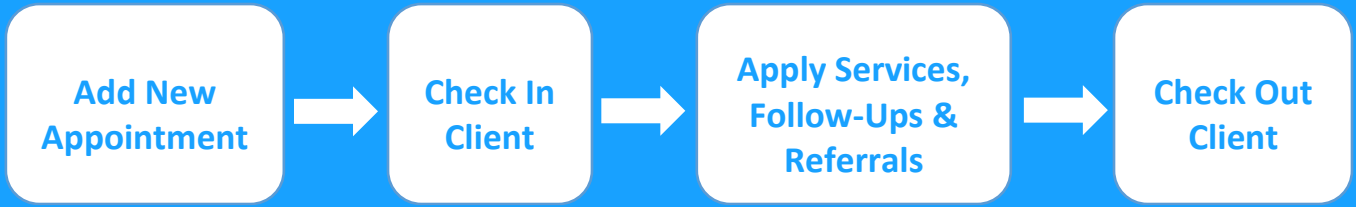


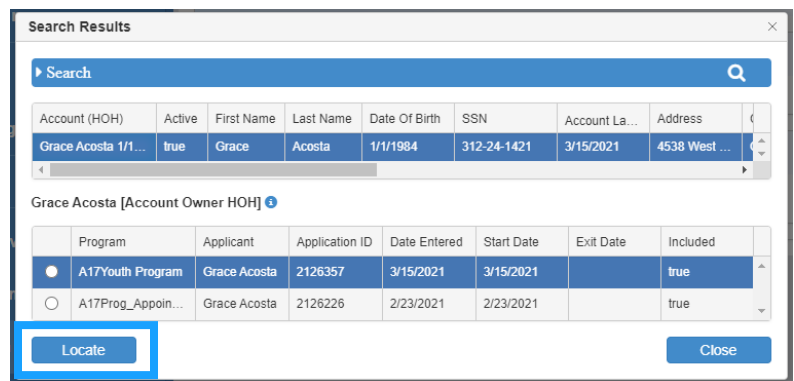
### Summary

Use the Light-Touch Service page, within Individual Services to create and establish a history of appointments and referrals for Light-Touch Services. Search for client in fields at top of page. Light-Touch Services page is used to create an appointment to provide advising in Housing, Financial Services, Transportation, Wellness, Mental Health, Food Security, and Workforce Development.



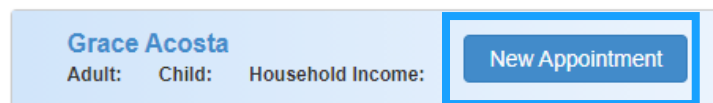
### Add New Appointment: On Light-Touch Service page

- Go to the **Light-Touch Service** page
- Locate Client in the **Look-Up** search bar
  - Enter Clients Name, Identifier or SSN
  - Click **SEARCH**
  - In Search Results popup-window:
    - Select Client Account
    - Click **LOCATE**

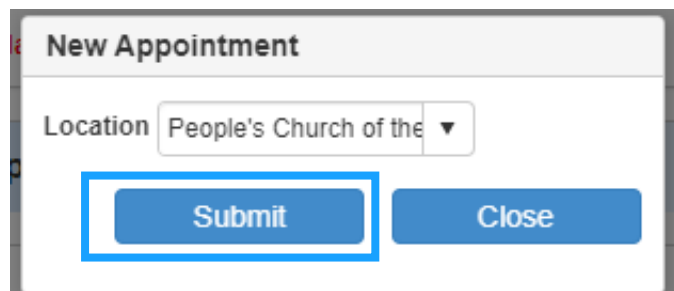


**Note: An Account must be created on the Account Summary page or in Portal for a Client to be Located.**

- Select **NEW APPOINTMENT**
- In the **New Appointment** popup window:
  - Select the **Location** for the Appointment from the dropdown
  - Click **SUBMIT**



**Note: A popup window will be displayed if a Location is limited to daily walk-in encounters, click YES to continue.**



## Check-In Client:

- After an Appointment has been created it will be listed under the selected Location
- Select **CHECK IN** next to the selected Location
  - In the popup window select **YES** to **Check In** for selected appointment.

[6/1/2021] Today's Appointment [Requested] **Check In**

Contact:

Location: People's Church of the Harvest [ Primary ] Comment:

**Services**

Employment

Health

Food

Food Addiction Counseling

Provide Fresh Fruits and Vegetables

Senior Food Box Delivery

Emergency Meal on Demand

Note:

Check-in the selected appointment?

**Yes** No

## Apply Services:

- Once **Check In** client has been selected, select **SERVICES** next to Today's Appointment [Check In]
- In the **SERVICES** popup window, mark the box with a Checkmark for the Services to apply
  - Provide a **NOTE** of the Light-Touch Services provided
  - Click **SAVE**

**Note: Selected Services and Note will be displayed on the Today's Appointment Check-In**

[6/1/2021] Today's Appointment [Check In] **Services** In: 12:33 PM

Contact: A17MEaddy

Location: People's Church of the Harvest [ Primary ] Comment:

**Services**

Employment

Health

Food

Food Addiction Counseling

Provide Fresh Fruits and Vegetables

Senior Food Box Delivery

Emergency Meal on Demand

Note:

**Services**

**Confirm Service:**

**Employment**  
No Service

**Health**  
No Service


**Food**


Food Addiction Counseling

Provide Fresh Fruits and Vegetables

Senior Food Box Delivery

Emergency Meal on Demand

Note \* 


Provided Food Assistance 

**Save** **Close**

## Follow-Up:

- Click on **FOLLOW-UP** to create a follow-up appointment.
- In the Follow-Up popup window, select the Service type and click **SEARCH**
  - Select the location for the Follow-up by clicking on the **MAKE APPOINTMENT** calendar icon.
- In the Follow-Up pop to Make Appointment, the Service location and information is listed.
  - Input Follow-Up Information, Appointment Date and Comment
  - Click **SUBMIT**
- Follow-Up Appointment is Created and has a green check-mark next to it.
  - Click on **FOLLOW-UP** to check the status
  - Click **CANCEL** to close window




Note: An  icon will appear, if there are any Upcoming Appointments to provide a quick view of requested appointment.


Grace Acosta  
 Adult: Child:  
 Household Income:

**Follow-up** Int. Referrals Ext. Referrals

Follow-up


Housing  Employment  Transportation  Health  Food **Search** Name: Grace Acosta

 **People's Church of the Harvest** (1 of 1)  
 People's Church of the Harvest [ Primary ] 3570 West 5th Avenue, Chicago, IL, USA  
 Mon Tue Wed Thu Fri Sun 09:00 AM - 05:00 PM  
 Avail: 6/2/2021




**Close**

Follow-up

 **People's Church of the Harvest**  
 ★ ★ ★ ★ ★  
 Location: People's Church of the Harvest [ Primary ]  
 Address: 3570 West 5th Avenue, Chicago, IL, USA  
 Day of Operation: Mon Tue Wed Thu Fri Sun  
 Business Hours: 09:00 AM - 05:00 PM  
 Phone: (325)325-3532  
 Earliest Available Date: 6/2/2021  
 Description: Communities Served : West Side

Service Location:  In Network  Other  
 Services:  Housing  Employment  Transportation  Health  Food

Appointment Date \* 6/21/2021 

Comment  
 Needs weekly food Assistance

**Submit** **Cancel**

Follow-up

**Created**

6/21/2021 [Requested]  
 Organization: People's Church of the Harvest Location: People's Church of the Harvest [ Primary ]  
 Contact:  
 Referral Comments: Needs weekly food Assistance.  
**Services**  
 Food  
 Food Addiction Counseling  Provide Fresh Fruits and Vegetables  Senior Food Box Delivery  
 Emergency Meal on Demand  
 Referral Response Note:

**Cancel**


## Internal Referrals:

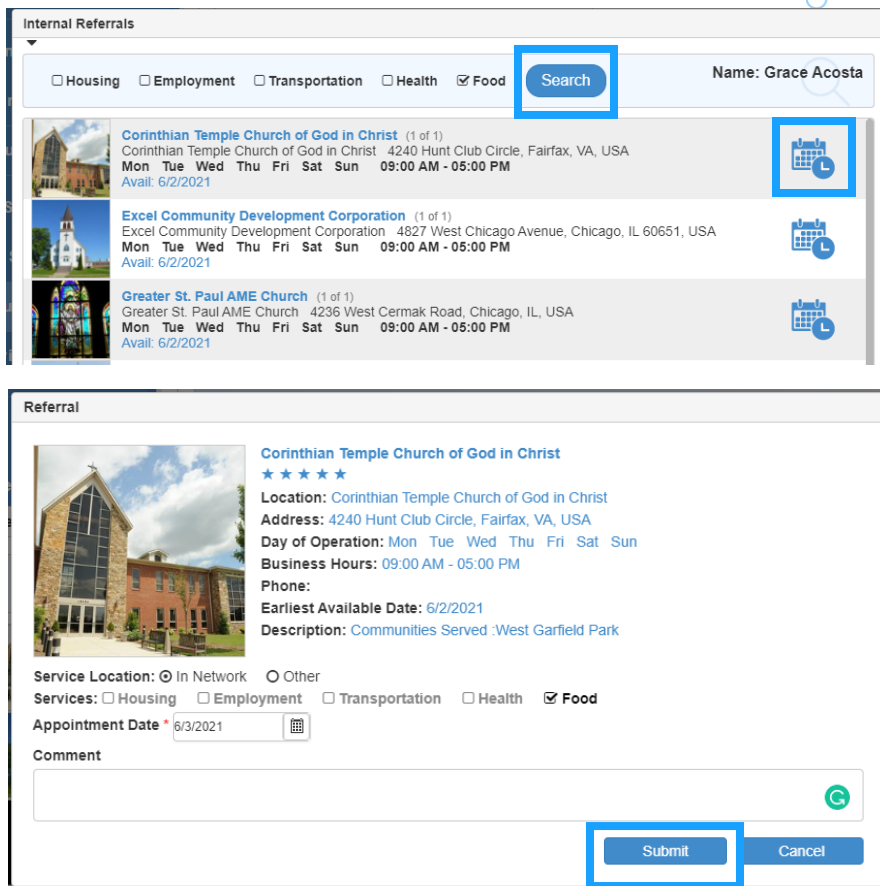
- Click on **INT. REFERRALS** to submit an Internal Referral.

Grace Acosta  
 Adult: Child:  
 Household Income:

Follow-up **Int. Referrals** Ext. Referrals







- In the Internal Referrals popup window, select the Service type being referral and click **SEARCH**
  - Select location for Internal Referral, as multiple locations may generate.
- Click on **MAKE APPOINTMENT** icon to create internal referral.
  - In popup window, input Referral Information, Appointment Date and Comment
    - Only one referral location per day can be made
  - Click **SUBMIT**

Note: An  icon will appear, to display list of Referrals in popup window.




**Internal Referrals**


Housing  Employment  Transportation  Health  Food  Name: Grace Acosta

-  **Corinthian Temple Church of God in Christ** (1 of 1)  
Corinthian Temple Church of God in Christ 4240 Hunt Club Circle, Fairfax, VA, USA  
Mon Tue Wed Thu Fri Sat Sun 09:00 AM - 05:00 PM  
Avail: 6/2/2021 
-  **Excel Community Development Corporation** (1 of 1)  
Excel Community Development Corporation 4827 West Chicago Avenue, Chicago, IL 60651, USA  
Mon Tue Wed Thu Fri Sat Sun 09:00 AM - 05:00 PM  
Avail: 6/2/2021 
-  **Greater St. Paul AME Church** (1 of 1)  
Greater St. Paul AME Church 4236 West Cermak Road, Chicago, IL, USA  
Mon Tue Wed Thu Fri Sat Sun 09:00 AM - 05:00 PM  
Avail: 6/2/2021 

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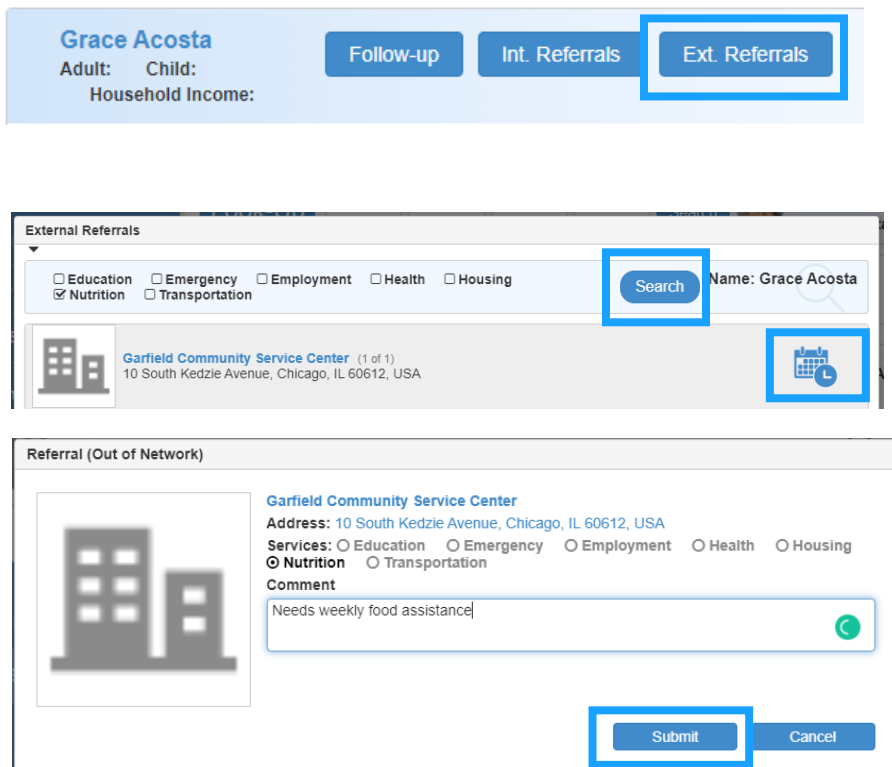
**Referral**

 **Corinthian Temple Church of God in Christ**  
★★★★★  
Location: Corinthian Temple Church of God in Christ  
Address: 4240 Hunt Club Circle, Fairfax, VA, USA  
Day of Operation: Mon Tue Wed Thu Fri Sat Sun  
Business Hours: 09:00 AM - 05:00 PM  
Phone:  
Earliest Available Date: 6/2/2021  
Description: Communities Served :West Garfield Park

Service Location:  In Network  Other  
 Services:  Housing  Employment  Transportation  Health  Food  
 Appointment Date \* 6/3/2021   
 Comment

## External Referrals:

- Click on **EXT. REFERRALS** to submit an External Referral.
- In the External Referrals popup window, select the Service type being referral and click **SEARCH**
  - Select location for External Referral, as multiple locations may generate.
- Click on **MAKE APPOINTMENT** icon to create external referral.
  - In popup window, input Referral Information, Appointment Date and Comment
    - Only one referral location per day can be made
  - Click **SUBMIT**





**Grace Acosta**  
Adult: Child:  
Household Income:

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**External Referrals**

Education  Emergency  Employment  Health  Housing  
 Nutrition  Transportation  Name: Grace Acosta

-  **Garfield Community Service Center** (1 of 1)  
10 South Kedzie Avenue, Chicago, IL 60612, USA 

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**Referral (Out of Network)**

 **Garfield Community Service Center**  
Address: 10 South Kedzie Avenue, Chicago, IL 60612, USA  
 Services:  Education  Emergency  Employment  Health  Housing  
 Nutrition  Transportation  
 Comment



## Check Out Client:

- Click on **CHECK OUT** to check out client
  - o Client should be marked as Check Out when services have been rendered
- A popup window will confirm if client should be marked Check-Out
  - o Click **YES**

[6/2/2021] Today's Appointment [Check In]		Services	<b>Check Out</b>	In: 2:22 PM
Contact: A17MEaddy				
Location: People's Church of the Harvest [ Primary ]		Comment:		
<b>Services</b> Employment Health Food <input type="checkbox"/> Food Addiction Counseling <input checked="" type="checkbox"/> Provide Fresh Fruits and Vegetables <input type="checkbox"/> Senior Food Box Delivery <input checked="" type="checkbox"/> Emergency Meal on Demand		<b>Note:</b> Provided Food Assistance		

Are you sure you want to check-out this appointment?