



## Summary

Use the Account Summary page to search, create or edit a client intake record. The Account Summary page displays only the user's account and household information.



## Add New Account: on Account Summary Page

Select **Look-Up** to search for a client:


- Enter the client's name.
- Click **SEARCH & ADD**
- If there is an existing account, matches will display on the **Search Results** tab.
  - Click on the existing client account by highlighting the selected account in blue.
  - Click **SELECT**
- To create an account for a new client:
  - Click on **Create New Account** tab.
  - Select the consent level.
  - Enter the first and last name.
  - Enter the date of birth and social security number, if available.
    - DOB and SSN may be required when applying for future services.
  - Enter phone number or email.
    - Check box if the client's phone number is not available.
  - Click **SIGN UP**
    - The client's account will display on the Account Summary page.

| Account (HOH)       | First Name | Middle Na... | Last Name | Date Of Birth | Last4 SSN | Account     | Email       | Phone1     | Add |
|---------------------|------------|--------------|-----------|---------------|-----------|-------------|-------------|------------|-----|
| Camden Hall 7/9/... | Camden     |              | Hall      | 7/9/1974      | 1974      | CFan202...  | CFan202...  | 9142662... | 680 |
| Camden Hall 7/9/... | Camden     |              | Hall      | 7/9/1974      |           | CHall202... | CHall202... |            |     |



## Add Contact Information: on Account Summary Page

Select the client's name in the **Profile** section.


- In the **Edit Account** popup window, enter the account profile information:
  - **Edit Account**
  - Add the **Contact Information**
  - Enter the **Last Known Permanent Address**:
    - Google Maps may auto-fill an address upon entering.
    - If the mailing address is not a residential address, check the box and enter the non-residential address.
  - To view the address history:
    - Click the **HISTORY** button  next to address.
  - Click **SAVE**

Click on  to **Change Account Name/Password**.

- In the **Change Account Name/Password** popup window, select an option to reset:
  - Account Name
    - Enter new account name/email address.
  - Password
    - Enter new password and confirm.
  - Click **OK**

Click on **Deactivate**  to deactivate account.

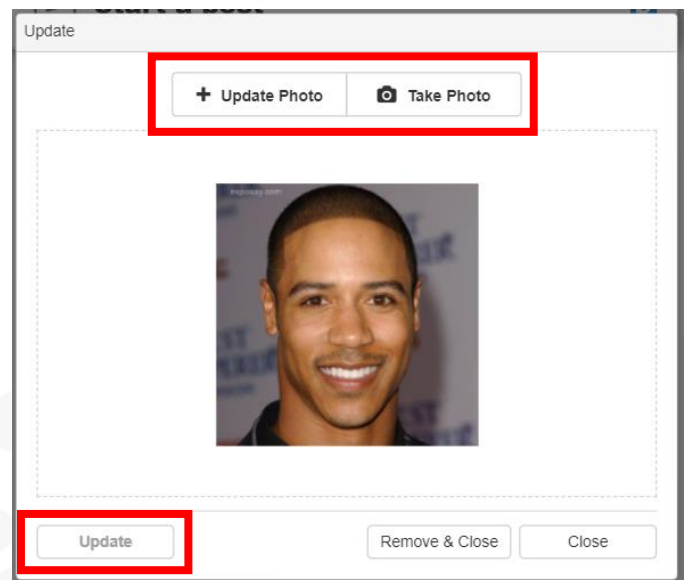
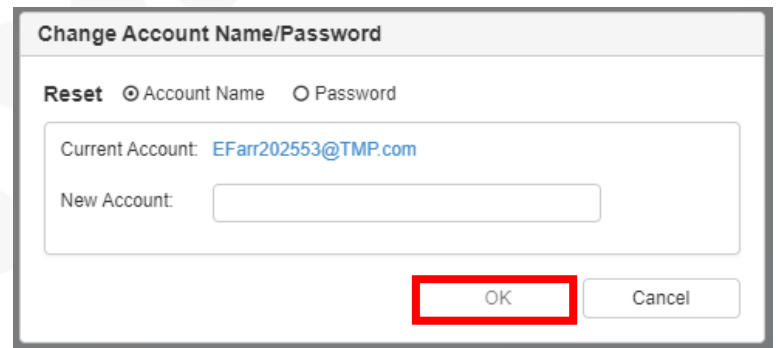
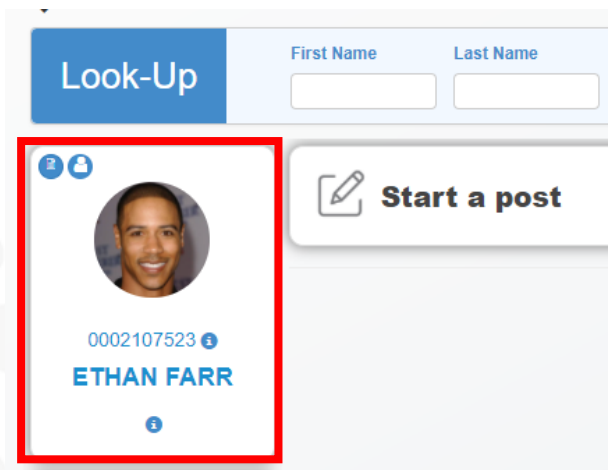
- In the popup window confirm deactivation by selecting **YES** or **NO**.

Click on the **Document Inventory** icon  to view documents in the Document Inventory.

- Quick access to pre-uploaded documents in a user's account.

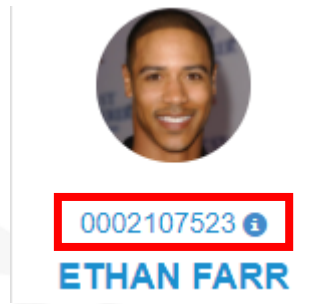
Select the **Profile Picture**:

- **Upload a photo** or **Take Photo** of client.
  - Client account needs to be active to upload a Photo.
- In the **Update** Photo popup window:
  - Click **UPDATE PHOTO** to upload a photo from your local computer or mobile device.







- A folder will display allowing you to select the desired photo.
    - Or click **TAKE PHOTO** to take a photo with your mobile device or web camera.
    - Click **UPDATE**
  - After saving, the photo will display in the top right section for all user pages.

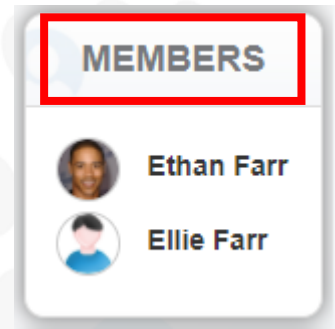


**Tip:** Click on  to view the account and the custom ID numbers.

## Add Member Information: on Account Summary Page

Click on **MEMBERS** to view and add new members.

- In the **Members** popup window, view:
  - General Household Info
  - Household Member(s)
  - Click **CLOSE**
- In the **Members** popup window, click on **ADD NEW MEMBER** to add a new member to the user's account.
  - In **Add** member popup window, enter member information for these required sections:
    - Basic Information
    - Additional Information
    - Race
    - Click **SAVE**
      - A popup window will display confirming the tax relationship status to the new member.
      - The new member will now display as a household member.
  - Click on **Delete**  to delete member.
  - To **Change Household Account Owner**, click on  next to selected household member name.
    - In the **Change Household Account Owner** popup window:
      - Next to selected household member choose **New Relationship** from the dropdown menu.
      - Click **SAVE**



**Add Member**

**BASIC INFORMATION**

First Name \*  Middle Name  Last Name \*  Suffix  Date Of Birth \*

Gender \*  Disabling Condition  Veteran Status  SSN (Highly recommended)

**ADDITIONAL INFORMATION**

Relationship to Head of Household \*  Marital Status  Ethnicity  Medical Insurance

Education  Residency Status  Primary Language   Interpreter Needed

Employment Status  USCIS Code  USCIS Number  USCIS Expiration Date

Deceased

**RACE (Choose As Many As Apply) \***

Native Hawaiian or Pacific Islander  White  American Indian, Alaska Native, or Indigenous  Asian or Asian American

Black, African American, or African  Client doesn't know

**Save** **Close**

**Change Household Account Owner**

**Current Owner:** Ethan Farr **New Owner:** Ellie Farr

**New Relationship: \***

Ethan Farr

**Save** **Close**




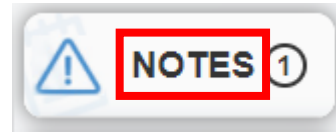
**Tip:** Click on household member's name to view and open the **EDIT MEMBER** popup window.



## Add Notes: on Account Summary Page

Select **NOTES** to add an alert/information note for clients to view on their account page.

- Client users cannot view alert/information notes.
- Internal staff are only able to view alert/information notes.
- Click **NOTES** to open the note popup window.
- In the **Notes** popup window: create, view, edit, or delete notes and note history.
  - Click on **ADD**  **ADD** to create a note.
    - Select Consent
    - Enter Subject
    - Enter Note Type
    - Expiration Date, if needed
    - Enter Note Information
    - Click **SAVE**





**Add Note**

Consent: Organization | Subject: Violence | Note By: AS1UserV6


Note Type: Alert | Note Date: 12/15/2020 | Expire Date: [calendar icon]



Note:

**Save** **Close**

- To edit a previous note, select the note, click **EDIT**  to update the information in the **EDIT NOTE** popup window.
  - Click **SAVE**
- To delete a note, select a note, and click **DELETE** .

**Note**

**ADD** 

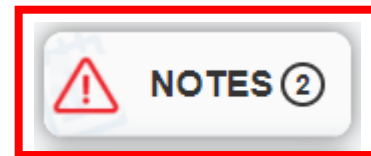
[11/11/2021]  

Consent: Organization | Note By: HCOProject | Note Type: | Expire Date: |

Note: May need extra assistance when in person.

**Close**

- Notes may have a circle with a number next to it. This number represents the number of notes for review.



**Tip: Selecting "ALERT" as the note type will cause the note icon to flash in red. The user's image/photo border will flash red on all client pages. Note history dates marked with "ALERT" will display in red font.**

## View Applications: on Account Summary Page

Select **APPLICATIONS**.

- Active applications will display in the applications section.
  - **Blue - Accepted**
  - **Green - In Review**
  - **Red - Exited**

**APPLICATIONS**

Accepted In Review Exited

No applications