Summary

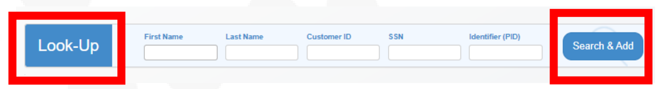
Use the Account Summary page to search, create or edit a client intake record. The Account Summary page displays only the user's account and household information.

Add New Account → Add Contact Information → Add Notes → Add Member Information → View Application

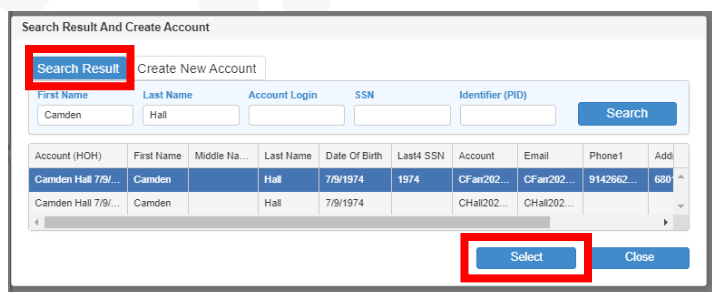
Add New Account: on Account Summary Page

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

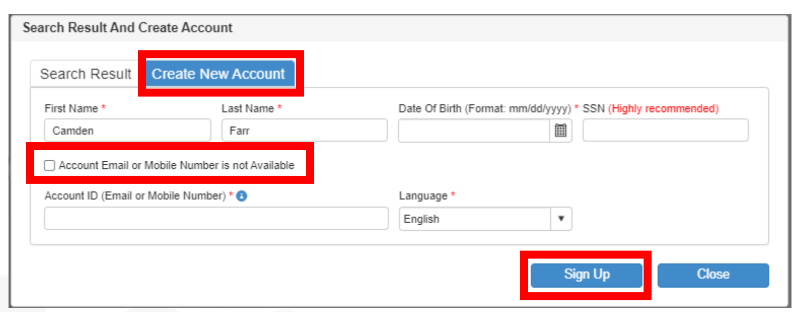
- ○ Enter the client's name.
- ○ Click **SEARCH & ADD**



- 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**

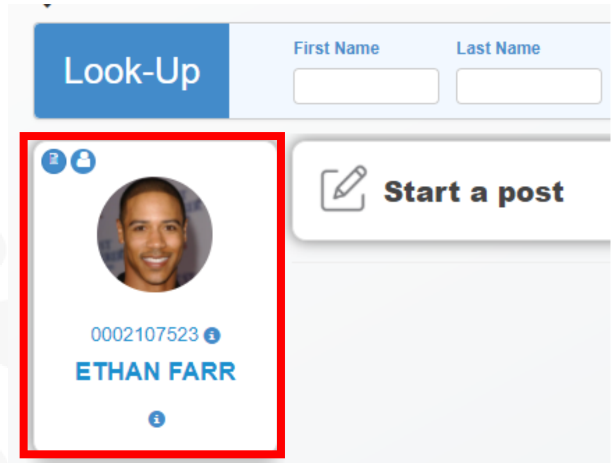


- To create an account for a new client:
  - ○ Click on **Create New Account** tab.
  - ○ Select the consent level.
  - ○ Enter the first and last name.
  - ○ Enter the date of birth and social security number, if available.
    - ▪ DOB and SSN may be required when applying for future services.
  - ○ 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.



Add Contact Information: on Account Summary Page

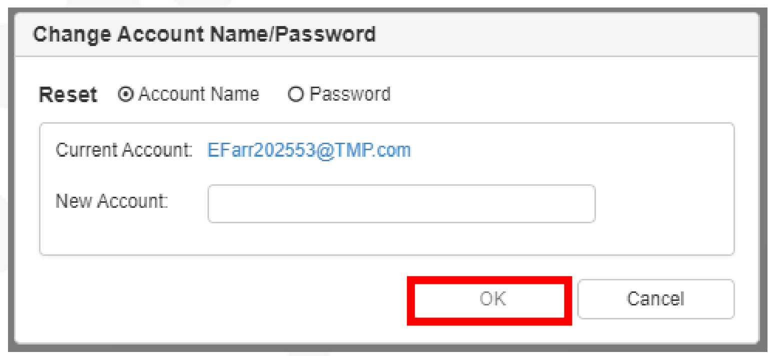
Select the client's name in the **Profile** section.



- 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.

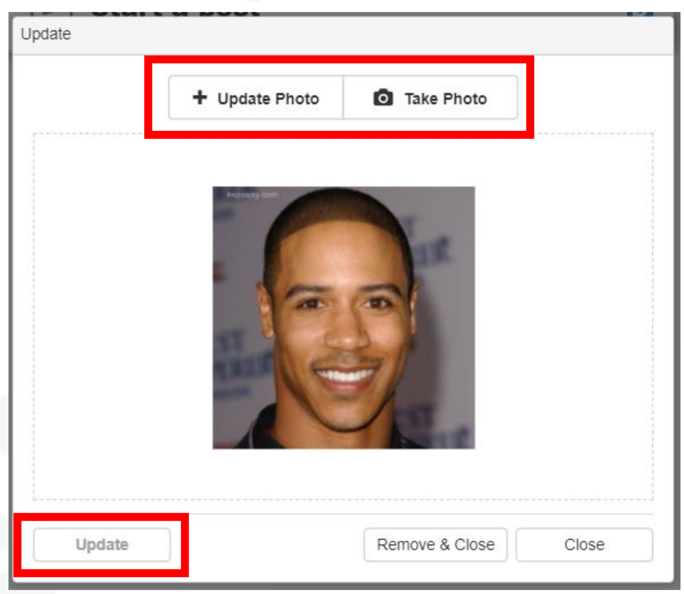
- In the popup window confirm deactivation by selecting **YES** or **NO.**

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

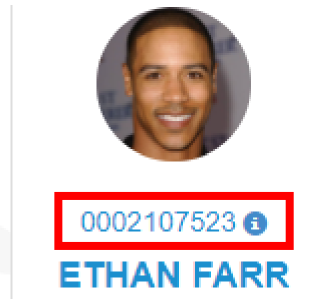
- Quick access to pre-uploaded documents in a user's account.

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.

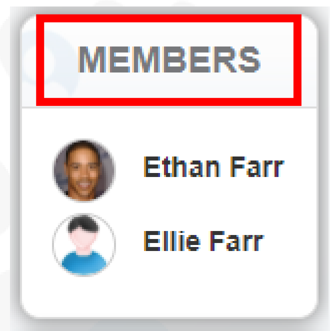


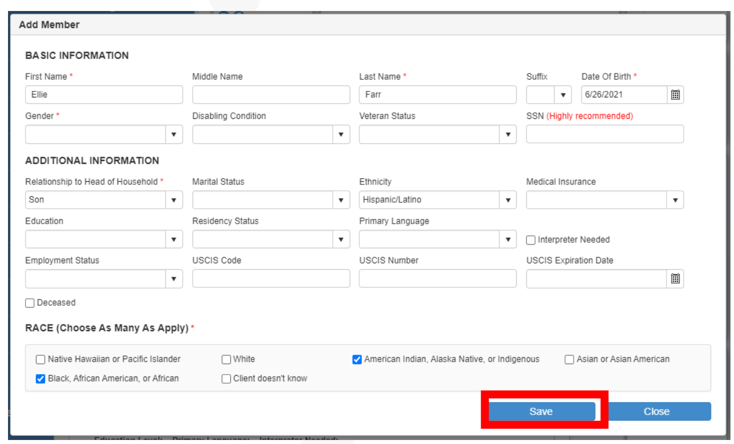
Tip: Click on to view the account and the custom ID numbers.

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**

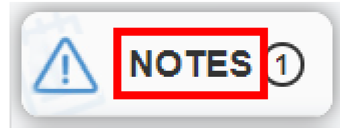




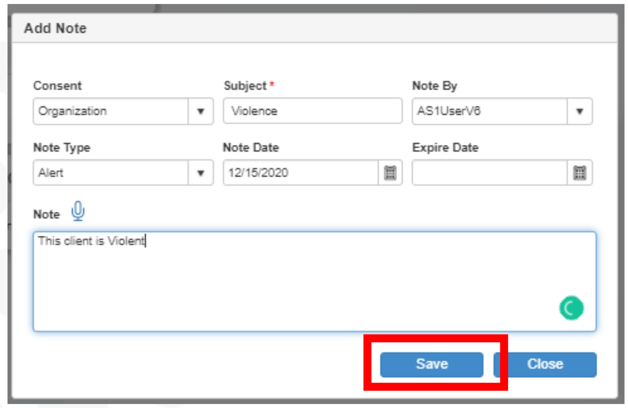
Tip: Click on household member's name to view and open the EDIT MEMBER popup window.

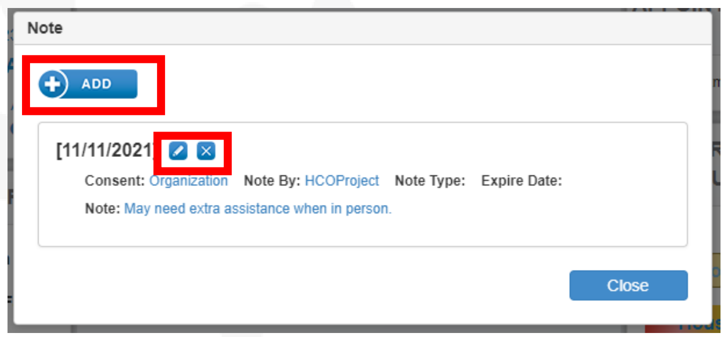
Add Notes: on Account Summary Page

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

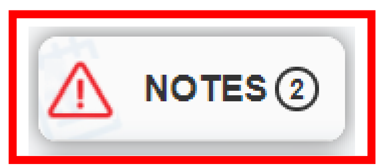


- Client users cannot view alert/information notes.
- Internal staff are only able to view alert/information notes.
- Click **NOTES** to open the note popup window.
- In the **Notes** popup window: create, view, edit, or delete notes and note history.
  - Click on **ADD** ADD to create a note.
    -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





  - 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** .
    - Click **YES** or **NO** to confirm note deletion.
- 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**