AES
Adaptive Enterprise Solutions

...unlocking the dawn of better results for your organization

CENTRAL INTAKE GUIDE

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Overview of Central Intake Section

All Clients will go through an intake process. The Head of Household will be recorded first, and then other Family and/or Household members can be added. A search will always be conducted first to make sure duplicate entries have not been created; Users should also take care to use Client Legal Names to make searches easier.

The information entered in Central Intake will be captured in a Snapshot at the time of Program Entry; any later changes to the Central Intake information after Program Entry will not affect the information captured. See the User Guide for each module for more information about editing the Snapshot.

Required items are shaded a light blue; these items must be complete in order to add a Client to the system.

Glossary

Domain is the physical instance of the software used for one collaborative; there may be a Production domain and a Training domain

Application is the designation given to the collection of pages in the system used for a specific type of program, i.e. HMIS, Head Start, CSBG, or Weatherization; only one Application can be used at a time

Organization is an Agency set up to use the system

Program is a program within the Organization; it will include one or more Program Components, Target Goals and Activities

Household is the grouping of Clients who live at the same address

Family is the grouping of Clients in a Household who are related by blood, marriage or adoption; there may be more than one Family in a Household

The Basic Process of creating a new Client in the system

1. Search for Client
2. Create Client Intake record with contact information
3. Record demographic information
4. Record income information
5. Create other Family and/or Household members and add demographic and income information for each
6. Create Employment and Education records
7. Upload necessary documents
8. Create initial Assessment
9. Enter Client into Program (*see Application guide for more information*)
    a. Use Go To Entry button to open Entry page with active Client

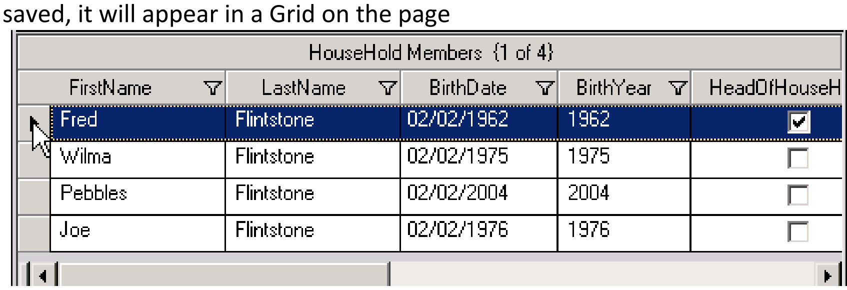
Common Elements to Intake pages

NEW and SAVE buttons

1 Most pages will have a NEW button
   a This starts the process on most pages
   b On the Household page, however, it starts a record for a new household member; you will use NEW only after recording the demographic information for the HOH Client
2 Most pages have at least one SAVE button
   a Make sure to use the SAVE button located in the section in which you’re currently working

Grids

1 When information is created and saved, it will appear in a Grid on the page



2 To select a record click in the space to the left side of the row
   a The entire row should be highlighted blue when selected
3 Most Grids show the number of the active record and the total number of records (i.e. 1 of 4)
4 Sort the records in a Grid by clicking on any Column Heading
   a Click a second time to sort in the reverse order
5 Click the Filter icon located on the right side of many column headings to filter the list by any of the items that appear
6 Place the cursor at the right edge of a column heading until it becomes a cross, then drag it to the right or left to widen or narrow the column
7 Change the order of the columns by clicking on a column heading and dragging it to a new position
   a The columns will not stay in this order the next time you log in

Selecting Client on page

Other than the two initial Intake pages, all Central Intake pages have a Customer dropdown at the top of the page; all household members of the active Client will be displayed in this dropdown.

1 Select the Client to use in the Customer dropdown

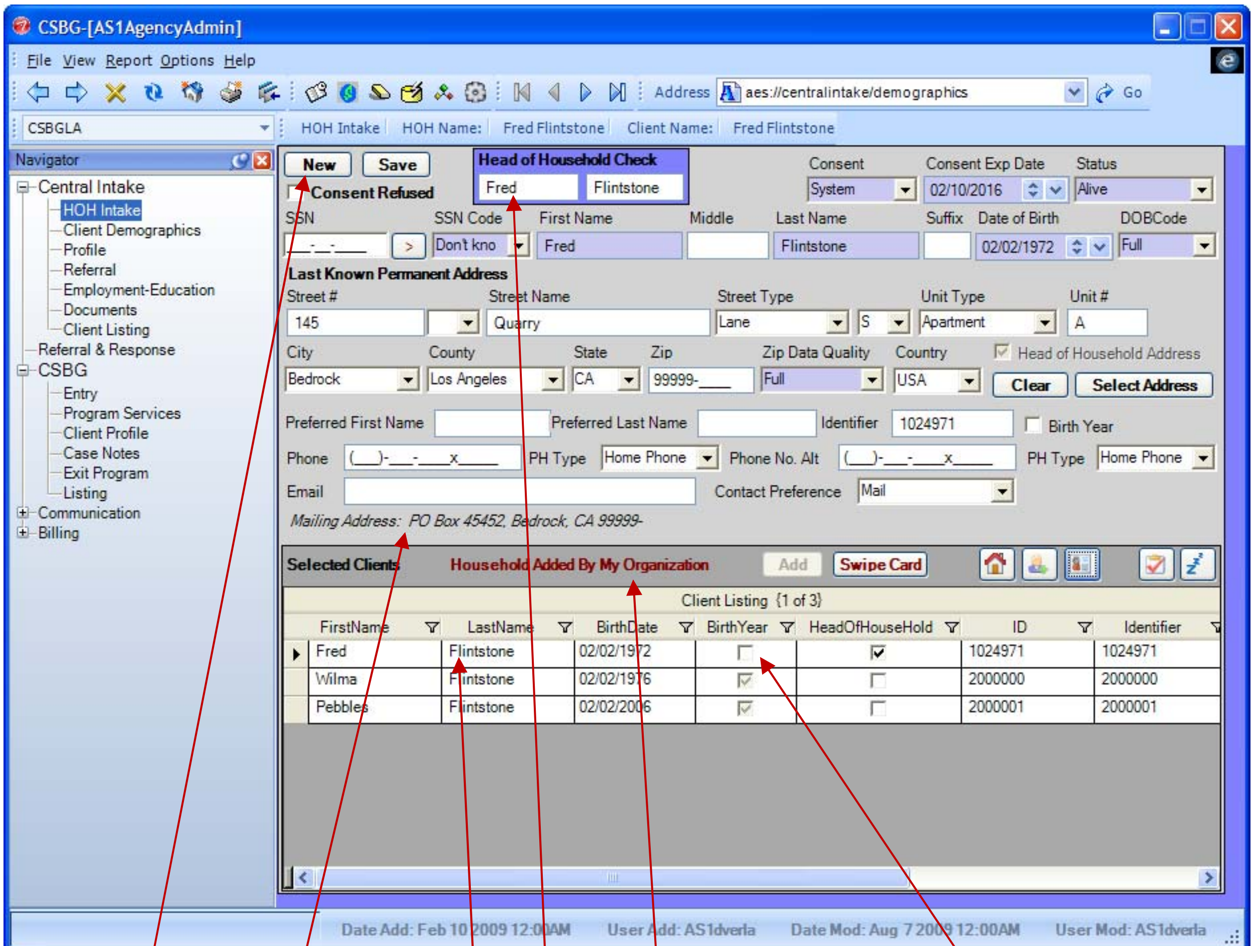
Current Client as well as Head of Household will be displayed in top Status Bar.

Initial Client Intake

The HOH Intake or Client Intake page is for recording all pertinent Client contact information including name, address, and date of birth. Always start Client Entry with a search to ensure duplicated Clients are not created. If entering entire household, start with the Head of Household, other family and household members will be entered on the Household Demographics page, see that page for instructions.

If this page is opened after searching on the Client Listing page, the Client record will appear grayed out if the initial intake was done at a different Agency. Click the ADD button to add permission rights for your Agency.

Note all required fields are shaded light blue.



Navigating the Demographics Page

- The NEW button clears all fields and starts a new record
- Enter Client name in Head of Household Check fields *only* to search for existing Client
- Light blue shaded fields are required
- After SAVE, information will appear in <u>CLIENT LISTING GRID</u>
- After additional family/household members are added on a different page, they will appear in the <u>CLIENT LISTING GRID</u> once the SRINK LIST TO CURRENT HOUSEHOLD or SHRINK LIST TO CURRENT FAMILY buttons are clicked
- If Mailing Address was created in Family contacts popup, it will appear directly beneath address information
- If Client was initially entered by this Organization, red letters will state that fact

Client Searches

The system will search for a Client record three times during the intake process:

1. After a first and last name is entered in Head of Household Check fields
2. After a Social Security number is entered
3. After First Name, Last Name and Date of Birth is entered

If there is a match, the Select Client popup window will appear displaying all matches.

4. Select the Client record to use
5. Click SELECT button
   a. If no record is correct, click the CANCEL button

Client information will appear on the page.

6. Check for accuracy
7. If changes are made, click SAVE button
8. Go to next page in Navigation Bar to check Client demographic information

> ➤ *Always start Client Intake with a search to avoid duplicate entries*
>
> ➤ *Use Legal Names to avoid having a Client entered more than once with different versions of the same name (i.e. William, Bill, and Billy)*
>
> ➤ *If Client record appears grayed out here, click the ADD button to add permission for your Agency*
>
> ➤ *Use the Client Listing page for a more Comprehensive Search*

Create New Client

1. Click NEW button at top of page

If Consent was refused, click to create checkmark in Consent Refused box and see *If Client Refuses Consent* below.

2. Enter Client name in Head of Household Check fields if conducting a search, otherwise leave blank
3. Enter Social Security Number
   a. If SSN is not known or not being collected, leave blank and select DON'T KNOW in SSN Code field
4. Enter **Social Security Code**
   a. This field is required
   b. Full = entire number is entered
   c. Partial = some digits are missing
   d. Don't Know = it is not known or being collected
   e. Refused = Client will not give numbers
5. Enter **First Name**, Middle Name, **Last Name** and Suffix
6. Enter **Birth Date**
   a. Single digit months and dates must be 2 digits, June 6 = 06/06
7. Select **DOB Code**
   a. Full = entire number is entered
   b. Partial = some digits are missing
   c. Don't Know = it is not known or being collected
   d. Refused = Client will not give numbers
8. Enter Last Known Permanent Address information
   a. Street # field is separate from Street Name and Street Type
   b. Direction indicators can go before or after Street Name
   c. Unit Type and Unit # is for apartments, suites, etc.
   d. City, Zip Code, State
   e. Zip code is not required, but **Zip Data Quality** IS required, Full = first five digits
9. Enter Preferred First and Last Name (Alias) if needed
10. Identifier will fill in automatically after SAVE
    a. Identifier may be entered if not using name information (see *If Client Refuses Consent* below)
11. Enter Phone numbers and Phone Types
12. Enter Email address
13. Enter Contact preference
14. Click SAVE button when all required fields are complete
    a. Client name will appear in CLIENT LISTING GRID and in top status bar when Save is successful
15. Go to next page in Navigation Bar to complete Client Intake

> ➤ *Create the Head of Household on this page; additional Family and Household members will be created on the next page*
>
> ➤ *Reports will look better and searches will be easier if names are entered with a capital first letter and remaining letters lower case (Fred Flintstone)*
>
> ➤ *Editing an address on this page will change it for all household members*

Use Existing Address

1 Enter several letters or numbers of address
2 Click SELECT ADDRESS button
3 Select address in popup window that appears
4 Click OK button

Create Family Contacts

1 Click ADD FAMILY CONTACTS icon button  located above the CLIENT LISTING GRID
2 In popup window, click NEW button
3 Enter or select Contact Type
4 Enter or select Relationship
5 Enter all Name and Address information
6 Click SAVE button
7 Repeat for additional contacts
8 Click CLOSE button when finished

➤ *Family Contacts are people liked to the Family in some way that the Agency may want to track; they may be emergency contacts, doctor, neighbor, etc.*

➤ *Family Contacts are NOT added to the database as Clients*

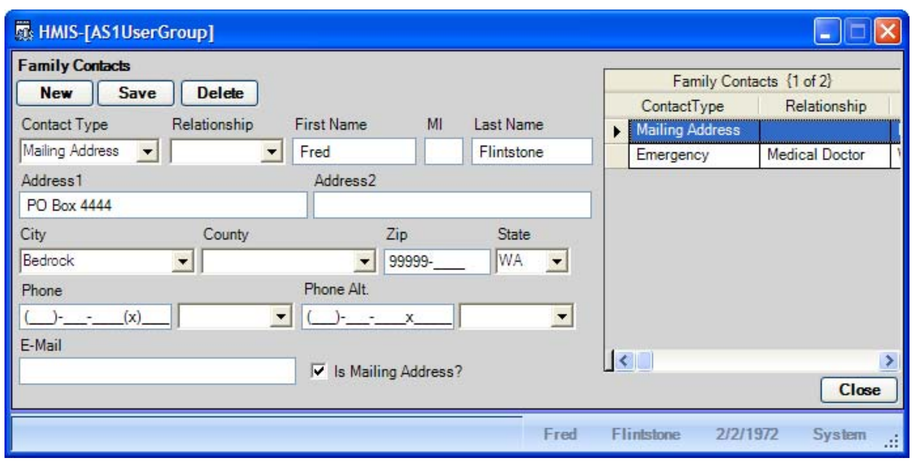
➤ *Family Contacts are shared by all members of the Family*

➤ *This is also the place to enter a Mailing Address if different than the Physical Address; the Mailing Address will apply to all members of the Same Family, not necessarily the entire Household*

Record Mailing Address

1 Click ADD FAMILY CONTACTS icon button  located above the CLIENT LISTING GRID
2 In popup window, click NEW button
3 Select mailing Address as Contact Type
4 Enter Name and Address information
   a Phone and Email can be left blank
5 Click to create checkmark in IS MAILING ADDRESS? checkbox
6 Click SAVE button
7 Click CLOSE button when finished

Mailing Address will appear on Intake page directly below address information.



View entire Family or Household in Client Listing Grid

This is only possible once other Family members have been entered on the Household page!

1 Click the SHRINK LIST To CURRENT HOUSEHOLD button 
OR
2 Click the SHRINK LIST TO CURRENT FAMILY button 

The entire Family or Household of the active Client will appear in the CLIENT LISTING GRID

Jump to Program Entry page

This will open the Program Entry page with the active Client; more information must be entered on the Household page before the Client may be entered into a Program.

1 Click JUMP TO PROGRAM ENTRY button

Jump to Beds page

This will open the Beds Assignment page; Client must be entered into a Program before assigning to a Bed.

1 Click JUMP TO BEDS button

Start Swipe Card Process

See *Swipe Card Guide* for complete process

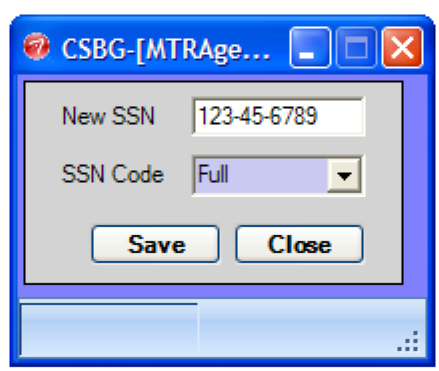
If Client refuses Consent

1 Click to create a checkmark in the Consent Refused checkbox
2 Enter Social Security Number
  a If SSN is not known or not being collected, leave blank and select DON'T KNOW in SSN Code field
3 Enter **Social Security Code**
  a This field is required
  b Full = entire number is entered
  c Partial = some digits are missing
  d Don't Know = it is not known or being collected
  e Refused = Client will not give numbers
4 First Name and Last Name fields will all be unavailable
5 Enter **Birth Date**
  a Single digit months and dates must be preceded by 0, i.e., June 6 = 06/06
6 Select **DOB Code**
  a Full = entire number is entered
  b Partial = some digits are missing
  c Don't Know = it is not known or being collected
  d Refused = Client will not give numbers
7 Enter Agency Identifier in middle of screen
  a This Identifier will be used for Client searches
8 Click SAVE button
9 Go to Household page to enter demographic information

Edit Social Security Number

If Social Security Number was entered incorrectly, it may be edited.

1 Click right arrow button next to SSN field >
2 In popup window, enter correct Social Security Number
3 Select new SSN Code
  a If full number was entered, select Full
4 Click SAVE
5 Click CLOSE

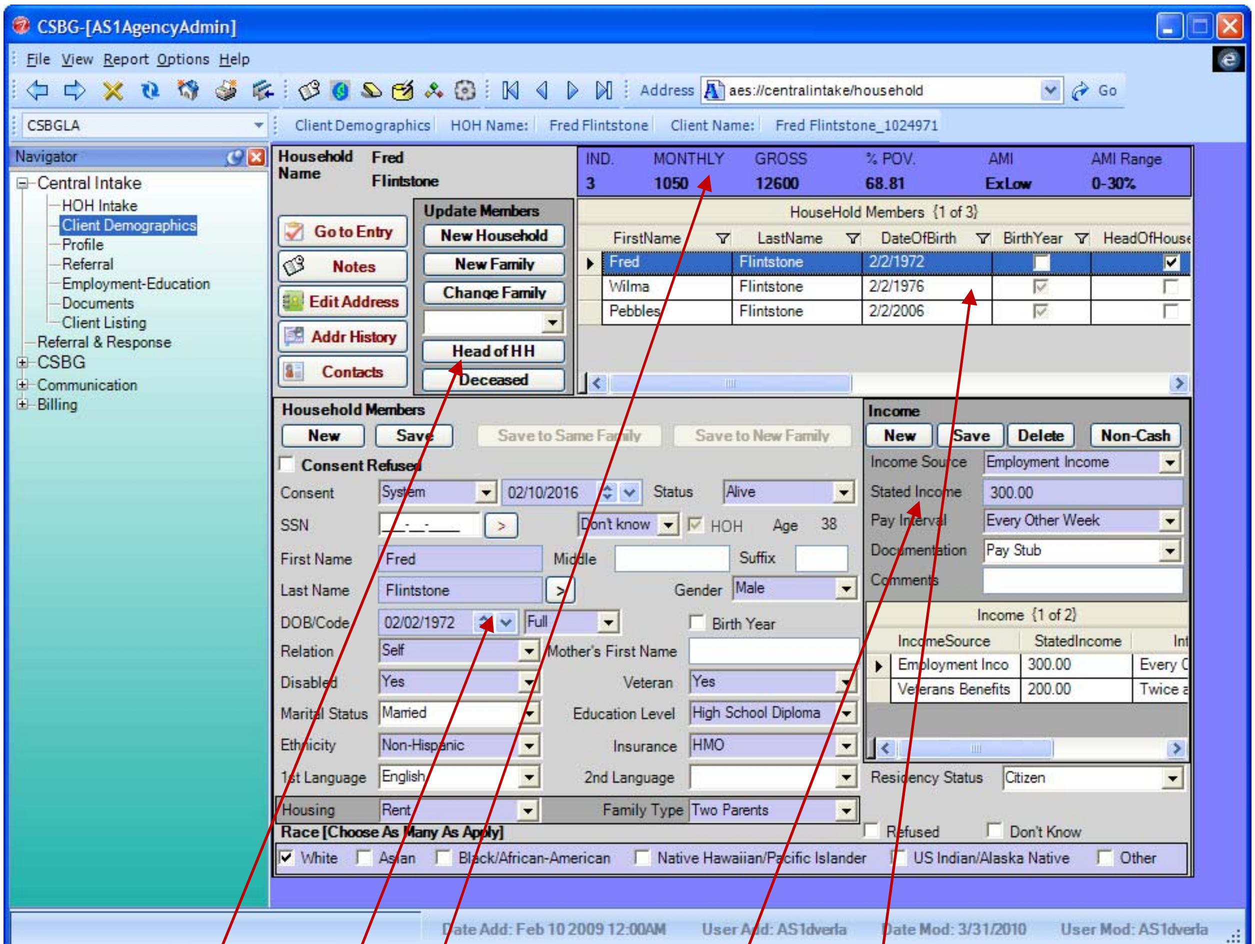


Add Demographics/Household Members

The Household page is used to record demographic and income information for the Client and all members of the household. All additional household members will be added directly on this page without having to go back to the Demographics page, and will be displayed in the grid at the top of the page. All pertinent information associated with each additional member (name, social security number, gender, income, etc.) can be added here.

Make sure all household members and all their demographic and income information is added before entering a Client into a Program.

Note all required fields are shaded blue.



Navigating the Household Page

- Active Client demographic information is in the lower left section
- Active Client income information is in the lower right section
- Buttons to manage information on the page are located in the top left section
- Family and Household members will appear in the HOUSEHOLD MEMBERS GRID
- Household income information is displayed directly above the grid

Add demographic information for Client

> ➤ *Fields on your page may be slightly different from what is pictured, but all required fields will be shaded blue*

Client Name, Social Security Number and Date of Birth are carried over from intake page and the age is calculated.

1 Select all additional information in each dropdown
   a Gender
   b Relation – this is relationship to Head of Family (for first Client entered will be SELF)
   c Mother's First Name
   d Disabled Status
   e Veteran Status
   f Marital Status
   g Education Level
   h Ethnicity
   i Insurance
   j 1st Language
   k 2nd Language
   l Housing
   m Family Type
   n Race
      i) Select as many as apply OR select Refused or Don't Know shown above blue choices section
   o These choices may be slightly different in some cases
   p Click SAVE button in left section

Client will appear in HOUSEHOLD MEMBERS GRID. If information is added or changed, save changes with SAVE button.

Add or Change Income information for Client

> ➤ *If there is an Income Record already created saying No Financial Resources, change that record instead of adding a new record*

Client income will start with No Financial Resources record. If that is true, skip to Add Non-Cash Benefits below.

Otherwise, change this record:

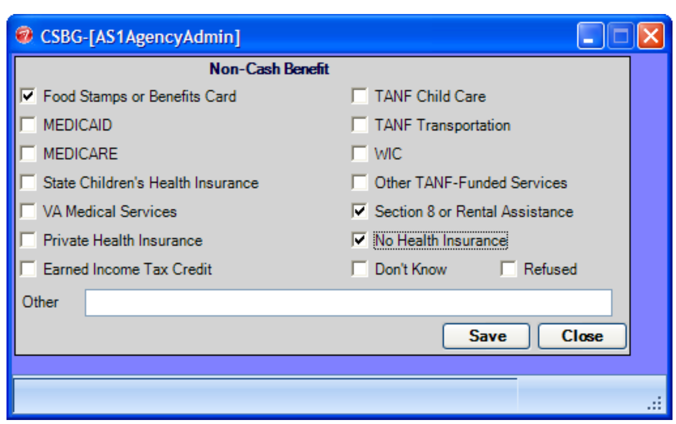
1 Select Income Source
2 Enter Stated Income
   a Enter income to match pay interval selected next
3 Select Pay Interval - Weekly, Every Other Week, Twice a Month, Monthly, Quarterly, Yearly
4 Select Documentation
5 Enter Comments
6 Click SAVE on right side of page
   a Use DELETE to remove unneeded record

To ADD additional income records:

1 Click NEW button on right side of page in income section
2 Select or enter the five fields described above
3 Click SAVE on right side of page
4 Repeat for additional income records

Add Non-Cash Benefits for Client

1 Click Non-Cash Benefits button
2 In the popup window, click to create checkmark next to all benefits received
3 If response is not listed, enter in Other field
4 Click SAVE button
5 Click CLOSE button when finished



Add new Household Members

> ➤ *When adding additional Household Members, you have the option of adding them to the SAME family as the initial Client or to a NEW family within the same Household*
>
> ➤ *Use the SAVE TO SAME FAMILY button to save new members to the same family as an existing member*
>
> ➤ *Use the SAVE TO NEW FAMILY button to save new member to a brand new family*
>
> ➤ *Use the SAVE button only when saving changes made to any Client's record*

1 Click NEW button in left side of page
2 If Consent was refused, click to create checkmark in Consent Refused box
3 Enter Social Security Number
   a If SSN is not known or not being collected, leave blank and select DON'T KNOW in SSN Code field
   b If SSN exists in system already, message will state that Client exists in another household and ask if you want to move Client to current Household
4 Enter **Social Security Code**
   a This field is required
   b Full = entire number is entered
   c Partial = some digits are missing
   d Don't Know = it is not known or being collected
   e Refused = Client will not give numbers
5 Enter **First Name**, Middle Name, **Last Name** and Suffix
6 Enter **Birth Date**
   a Single digit months and dates must be preceded by 0 (i.e. June 6 is 06/06)
7 Enter or select remaining demographic information
8 Click SAVE TO SAME FAMILY button to add the household member to the same family OR
   Click SAVE TO NEW FAMILY button to add the household member to a new family in the household
   a If there are already multiple Families in the household when saving to the same family, a message will appear asking to WHICH family you want to add the new member
9 Enter Income information (see *Add or Change Income Information* above)
10 Repeat for additional Household Members

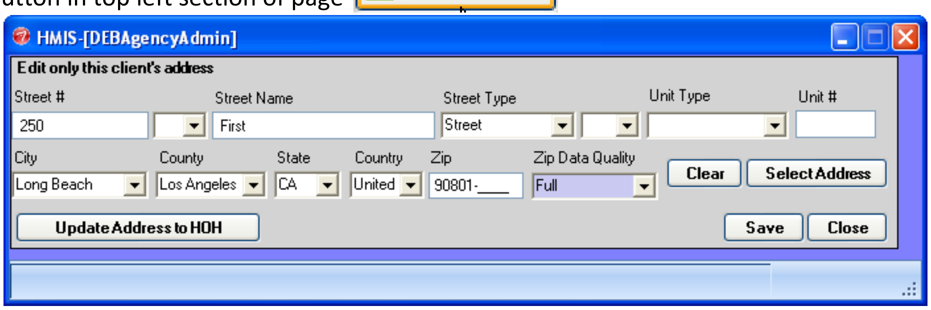
Make sure all family/household members are created and that their demographic and income data is input before entering the Clients into a Program.

Change Client Address

If changing address for entire Household, return to the previous page and make the change there. If making the change for one Household Member:

1 Select Client in HOUSEHOLD MEMBERS GRID
2 Click EDIT ADDRESS icon button in top left section of page

In popup window:



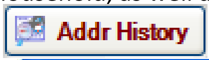
3 To edit address:
   a Make changes to existing address
4 To create new address:
   a Click CLEAR button to start with blank fields and enter new address information
5 To make Client address match Head of Household address:
   a Click UPDATE ADDRESS TO HOH button
   b Address will fill in automatically
6 Click SAVE button
7 Click CLOSE button

Changes here will cause Address ID to change for selected Client; address will be changed on Demographics page for selected Client(s).

View Client Address History

The popup window displays all changes made to a Client's household address information. It can track the timeframe that a Client resides in a particular household, as well as housing type, payment source, and fee

1 Select Client in HOUSEHOLD MEMBERS GRID



2 Click ADDRESS HISTORY button in top left section of page

3 To add additional information:

a Select address record

b Enter new information or change existing information

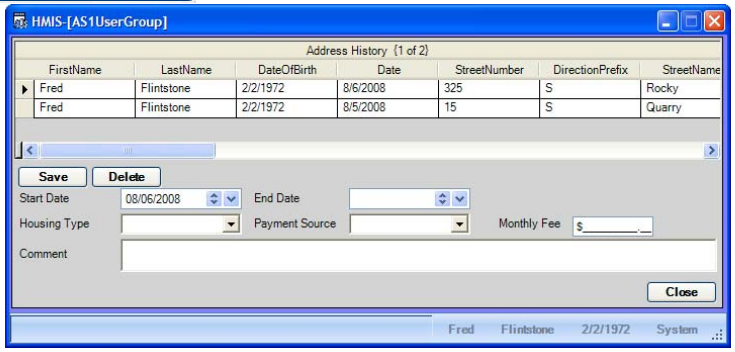
c Click SAVE button

4 To delete an address record

a Select address record to delete

b Click DELETE button

5 Click CLOSE button when finished



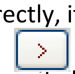
Create Family Contacts

Family Contacts are created on this page the same way as on the Demographic page (*see instructions included on Demographics page*).

Edit Social Security Number

If Social Security Number was entered incorrectly, it may be edited.

1 Click right arrow button next to SSN field



2 In popup window, enter correct Social Security Number

3 Select new SSN Code

a If full number was entered, select Full

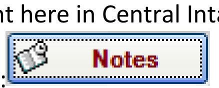
4 Click SAVE

5 Click CLOSE

Enter Notes

Put notes about the Client here in Central Intake.

1 Click NOTES button



2 In the popup window:

3 Click NEW

4 Select Consent

a This determines who can view this note

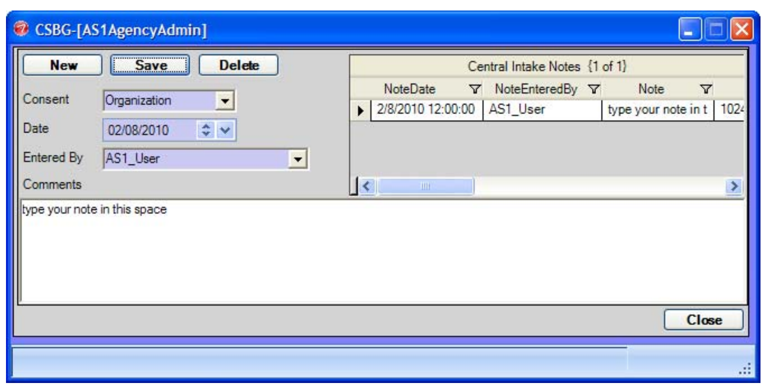
5 Select Date and who entered it

6 Enter Comments

7 Click SAVE

a Use DELETE to remove unwanted note record

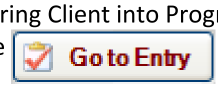
8 Click CLOSE when finished



Go to Program Entry page

Make sure all Client demographic and income data is input before entering Client into Program!

1 Select Client in HOUSEHOLD MEMBERS GRID on top right section of page

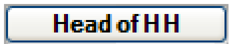


2 Click GO TO ENTRY button on left side of page

Entry page will open with active Client.

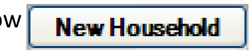
Manage Family and Household Members

Change Head of Household

1 Select Client to become Head of Household in HOUSEHOLD MEMBERS GRID at top of page
2 Click HEAD OF HH button 

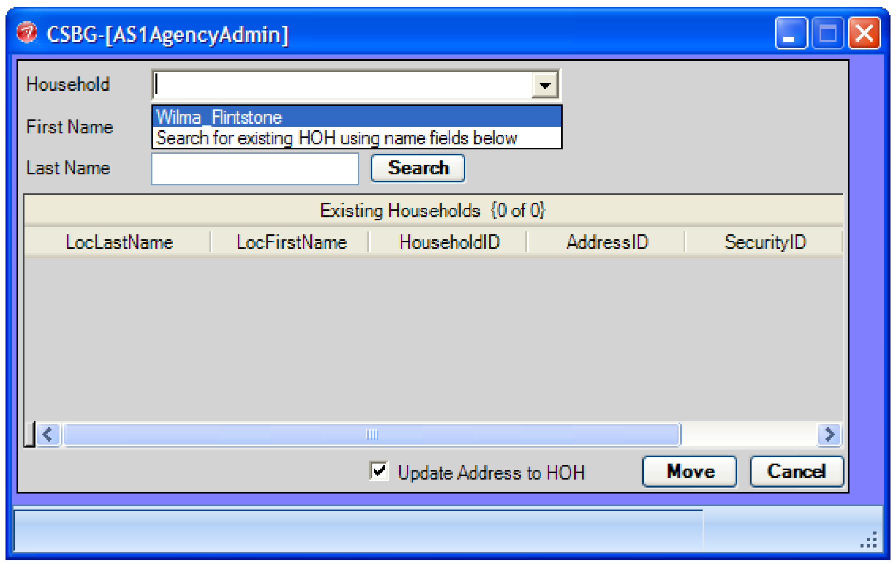
This Client will now be designated Head of Household, and it will automatically be changed for former HOH. A warning will appear advising you to update the Relation to HOH for all household members.

Move Individual(s) to a NEW Household

1 Select Individual(s) to move in HOUSEHOLD MEMBERS GRID on top right section of page
2 Click NEW HOUSEHOLD button on left side of page to open popup window 

3 In Household dropdown, select their own name
  a Name selected will become Head of Household of the new Household
  b If moving more than one individual, all the names will appear here, select the one to become HOH
4 Click MOVE

This moves the Individual(s) to a new Household and creates a Head of Household; it also assigns a new Family ID. A new address will need to be added (*see Change Client Address above*).



Move Individual(s) to a DIFFERENT, existing Household

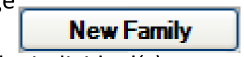
1 Select Individual(s) to move in HOUSEHOLD MEMBERS GRID on top right section of page
2 Click NEW HOUSEHOLD button on left side of page to open popup window
3 In Household dropdown, select Search for existing HOH using name fields below
4 Enter first and last name of the Head of Household in the destination household
5 Click SEARCH button
6 Matches will appear in EXISTING HOUSEHOLDS GRID
  a Select the desired Household
7 If Client address should change to the address of this Household, click to create checkmark in Update Address to HOH checkbox
8 Click MOVE button
  a Yes will change the Client address to match the address of the Household they are joining

This moves the Individual(s) to a different, existing Household; it also gives them a new Family ID. If they should join the Family in this Household, see *Move Individual(s) to an EXISTING Family in the same Household* below.

Move Individual(s) to NEW Family within same Household

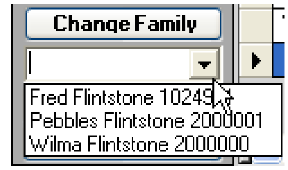
1 Select Individual(s) to move in HOUSEHOLD MEMBERS GRID on top right section of page

2 Click NEW FAMILY button on left side of page



This creates a new family within the same household and assigns a new Family ID to the individual(s).

Move Individual(s) to an EXISTING Family in the same Household



1 Select Individual(s) to move in HOUSEHOLD MEMBERS GRID on top right section of page

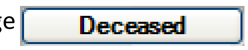
2 Select the new Family ID in dropdown box beneath CHANGE FAMILY button

3 Click CHANGE FAMILY button on left side of page

Individual(s) will move to the other family, but will leave rest of household as is.

Mark Client deceased

1 Select Client in HOUSEHOLD MEMBERS GRID at top of page

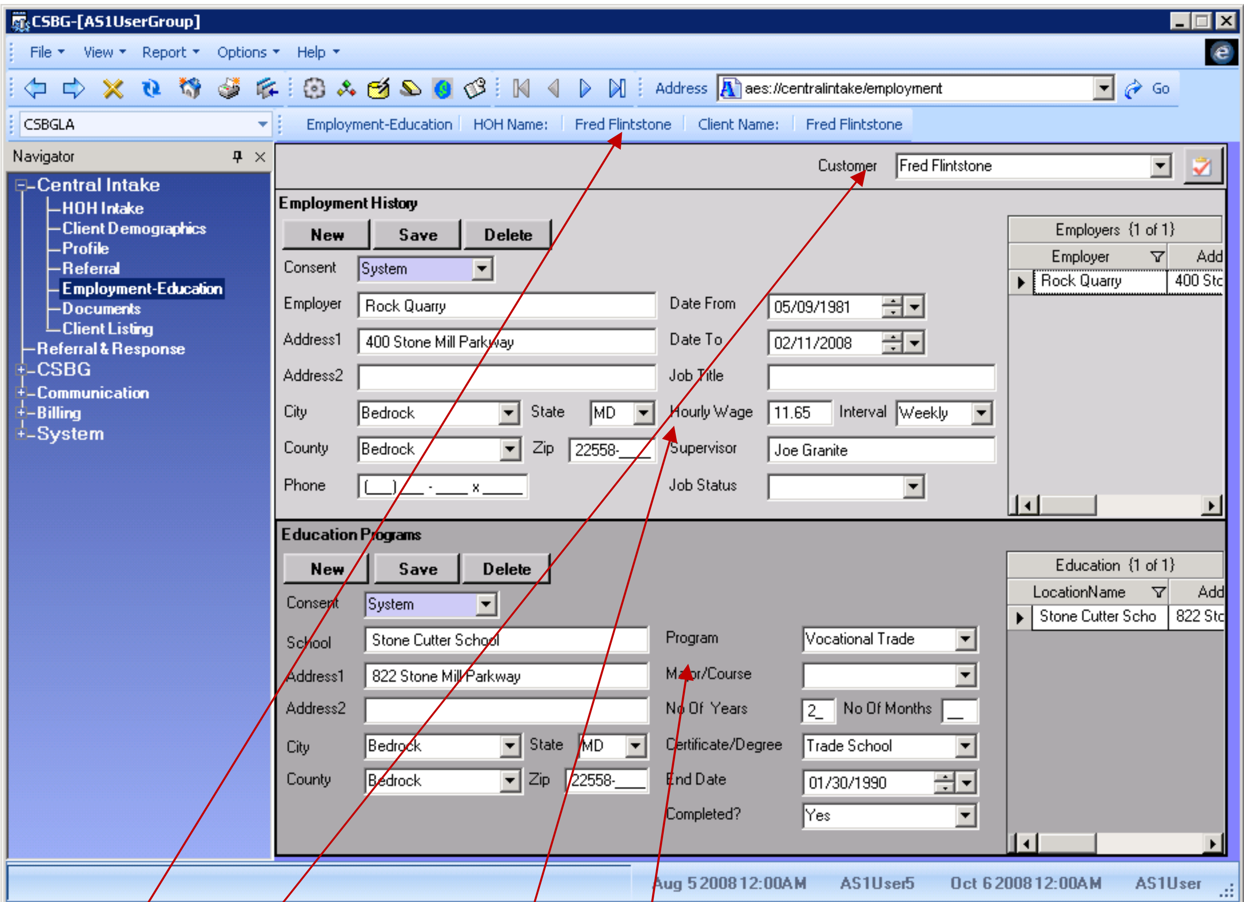


2 Click DECEASED button

Household member is removed from screen, but not from database.

Add Employment/Education Records

The Employment/Education page is split into two sections for entering previous employment and education information. Multiple entries can be entered for both sections and will be listed in the grid to the left of each section.



Navigating the Employment/Education Page

- Head of Household is listed at top of page, along with active Client
- Select Client in Customer dropdown
- Employment records are created and displayed in the top section
- Education records are created and displayed in the bottom section

Create Employment record

1 Make sure correct Client is selected
   a Use dropdown at top of page to select Customer
   b Head of Household is listed at top of page
2 Click NEW button in top section
3 Select Consent Level
   a This determines who will be able to see the document
4 Enter or select Employment information
5 Click SAVE button
   a Use DELETE button to remove unnecessary record
6 Repeat for additional Employment records

➤ *Employment and Education records are not required for Program Entry but are useful information*

➤ *Multiple records can be created for each Client*

Create Education record

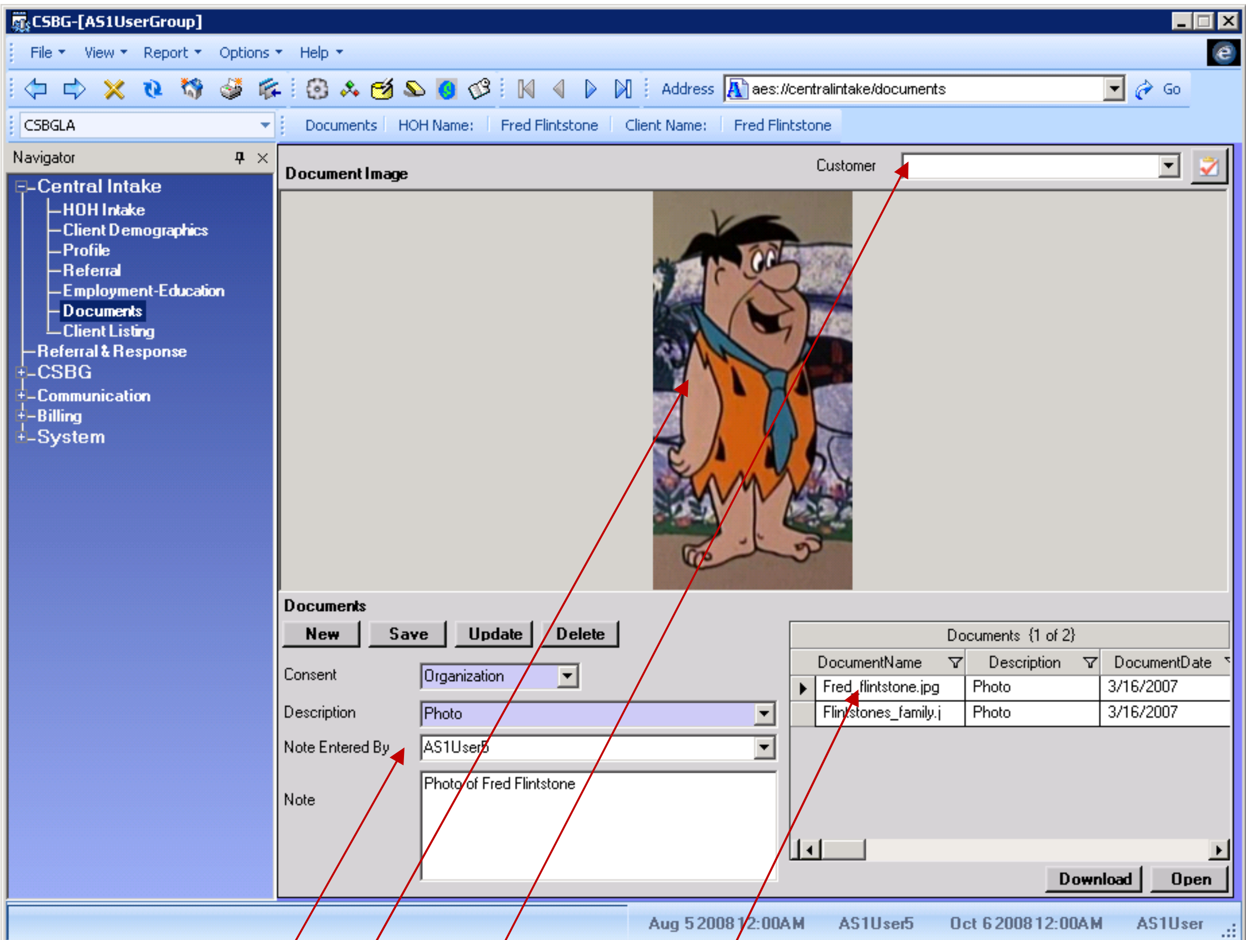
1 Make sure correct Client is selected
   a Use dropdown at top of page to select Customer
   b Head of Household is listed at top of page
2 Click NEW button in bottom section
3 Select Consent Level
   a This determines who will be able to see the document
4 Enter or select Education information
5 Click SAVE button
   a Use DELETE button to remove unnecessary record
6 Repeat for additional Education records

Jump to Program Entry

1 Make sure correct Client is selected
2 Click JUMP TO PROGRAM ENTRY icon button at top of page 

Add Documents

The Documents form is for listing any pertinent documentation associated with the client (i.e. word documents, spreadsheets, pictures, etc.) and their locations. If using Swipe Card technology, photos can be stored here to use on Client ID cards.



Navigating the Documents Page

- HOH and active Client are listed at top of page
- Select Client in Customer dropdown
- All saved documents are displayed in the <u>Documents Grid</u>
- If the document is a photo, it will be displayed in the top section
- Information about the selected document appears in the left bottom section

Add a new Document file

1 Make sure correct Client is selected
  a Use dropdown at top of page to select Customer; Head of Household is listed in Status Bar
2 Click NEW button
3 In popup window, navigate to desired document
4 Click OPEN
5 Select Consent Level
  a This determines who will be able to see the document
  b Each document may have a different consent level
6 Enter or select Description
7 Note Entered by fills in automatically with User ID
8 Enter Note
9 Click SAVE

Record will appear in DOCUMENTS GRID

Update a Document file

1 Make sure correct Client is selected
  a Use dropdown at top of page to select Customer; Head of Household is listed in Status Bar
2 Select file to update in the DOCUMENTS GRID
3 Click UPDATE button
4 Open dialog box will open, select new file
5 Click OPEN button

Delete a Document file

1 Make sure correct Client is selected
  a Use dropdown at top of page to select Customer; Head of Household is listed in Status Bar
2 Select record in DOCUMENTS GRID
3 Click DELETE

Record will disappear from DOCUMENTS GRID

Download a Document file to the local computer

1 Make sure correct Client is selected
  a Use dropdown at top of page to select Customer; Head of Household is listed in Status Bar
2 Select file to download in the DOCUMENTS GRID
3 Click DOWNLOAD button
4 Save As dialog box will open, select the location to save the file

Open a Document file

1 Make sure correct Client is selected
  a Use dropdown at top of page to select Customer; Head of Household is listed in Status Bar
2 Select file to open in the DOCUMENTS GRID
3 Click OPEN button

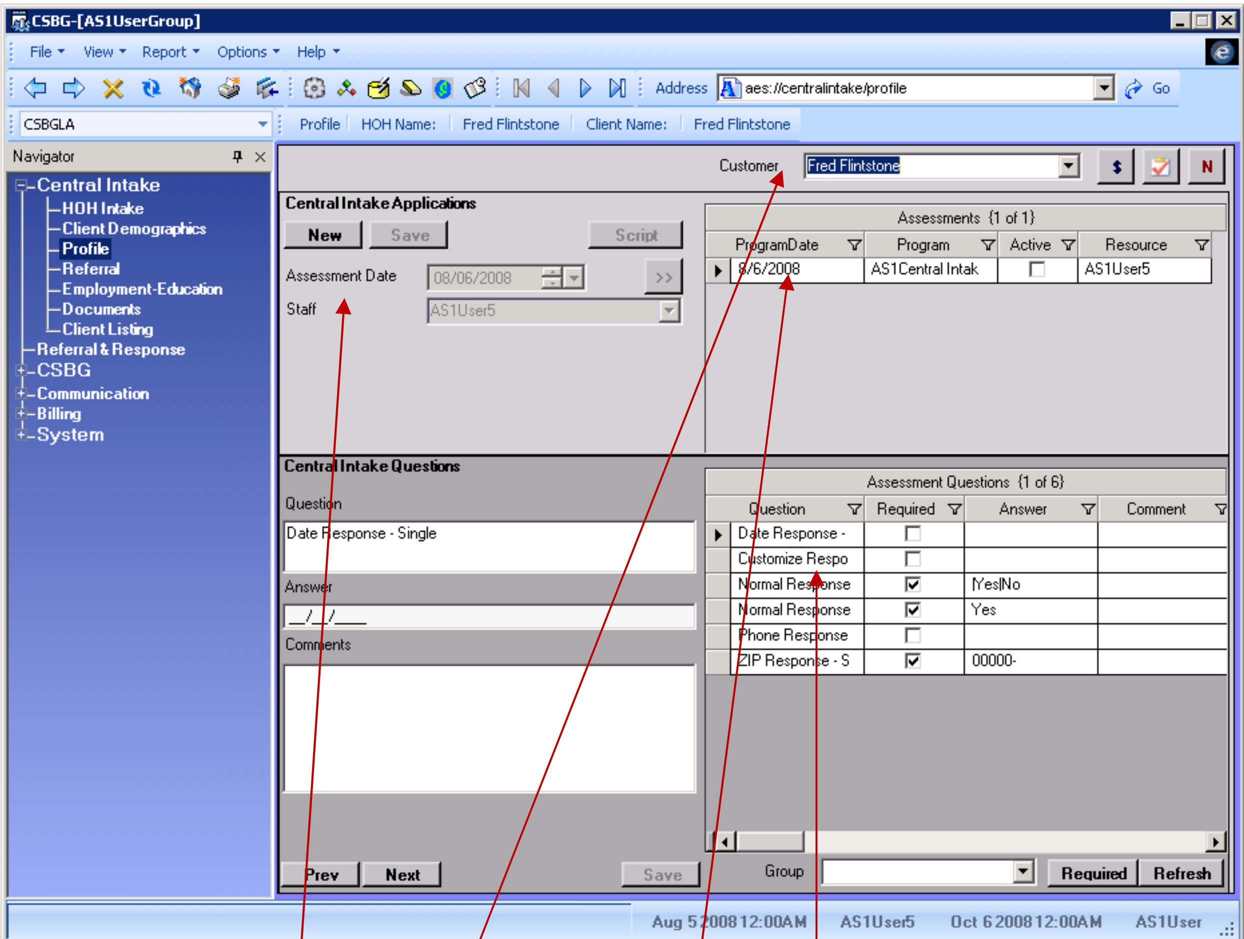
File will open in program registered to that file type.

Jump to Program Entry

1 Make sure correct Client is selected
2 Click JUMP TO ENTRY icon button at top of page 

Create Eligibility/Profile Record

The Eligibility page is used to do an initial assessment of the Client. An Income Snapshot can be viewed on this page, but not changed. The Client does not have to be enrolled into a Program to do the assessment.



Navigating the Eligibility Page

- HOH and active Client are listed at top of page
- Select Client in customer dropdown
- Create and Save a new Assessment in this section
- All existing Assessments will appear in the ASSESSMENTS GRID
- Questions for selections Assessment section will appear in the ASSESSMENT QUESTIONS GRID

A Profile record may need to be created in order to use the Referral page. If your Agency is not currently using the Profile questions, just click the NEW button and then the SAVE button, without answering any questions. The record will be created and the Referral page will be active. Go to the *Create Referral* section.

Create a new Profile/Assessment

1 Make sure correct Client is selected
  - a Use dropdown at top of page to select Customer
  - b Head of Household is listed in Status Bar

2 Click NEW button

3 Select Assessment Date

4 Select Staff member

5 Click SCRIPT button
  - a The Assessment will appear in a new window; answer to each question will cause the next appropriate question to appear

6 Click SUBMIT in assessment window when finished

7 Click SAVE on Profile page
  - a Profile record will appear in the ASSESSMENTS GRID and questions and answers will appear in ASSESSMENT QUESTIONS GRID

View Profile/Assessment Questions and Answers

1 Make sure correct Client is selected

2 Select Assessment in ASSESSMENTS GRID at top of page

View Income Snapshot

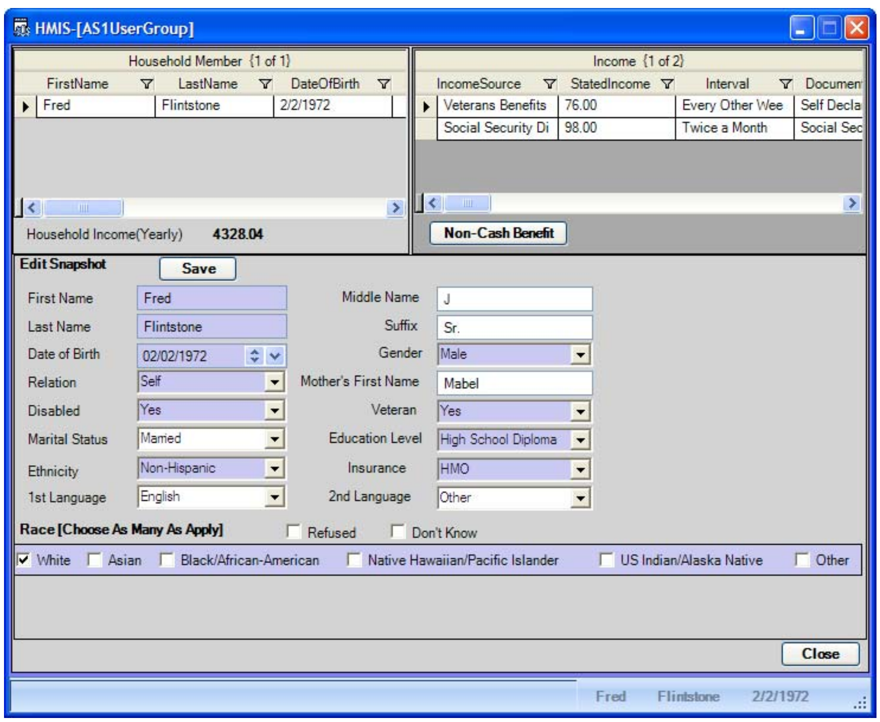
1 Make sure correct Client is selected

2 Click the $ button to open Income Snapshot  popup window

3 In the popup window, view
  - a Household Member income
  - b Non-Cash Benefits
  - c Demographic information

4 To edit demographic information:
  - a Make changes
  - b Click SAVE button

5 Click CLOSE button when finished



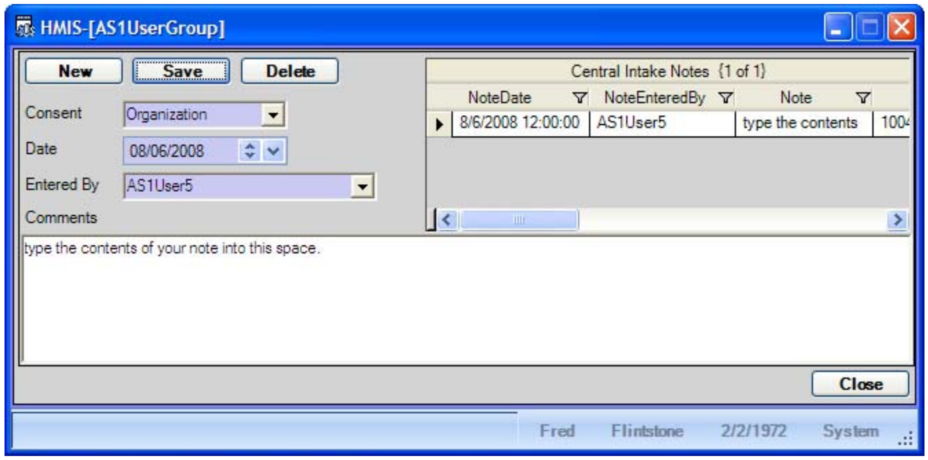
Jump to Program Entry

1 Make sure correct Client is selected

2 Click JUMP TO PROGRAM ENTRY icon button at top of page 

Create Note

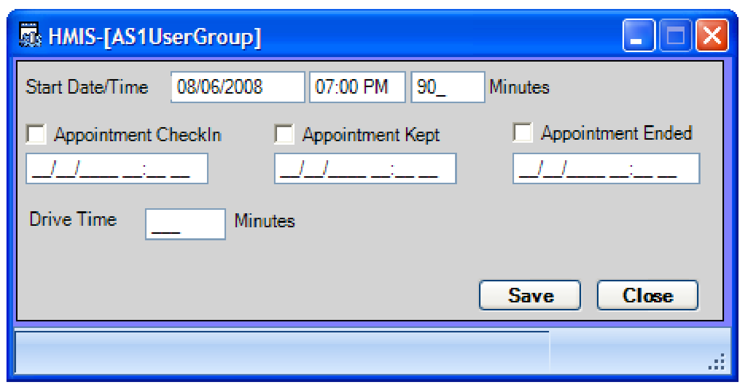
1. Make sure correct Client is selected
2. Click N button 
3. In popup window, click NEW button
4. Select Consent level
5. Select Date
6. Select Staff entering note
7. Enter note text in Comments box
8. Click SAVE button
   a. Use DELETE to remove unwanted note record
9. Click CLOSE when finished



Multiple notes may be created, and may be deleted with the Delete button, this will also display all notes created on the Household page.

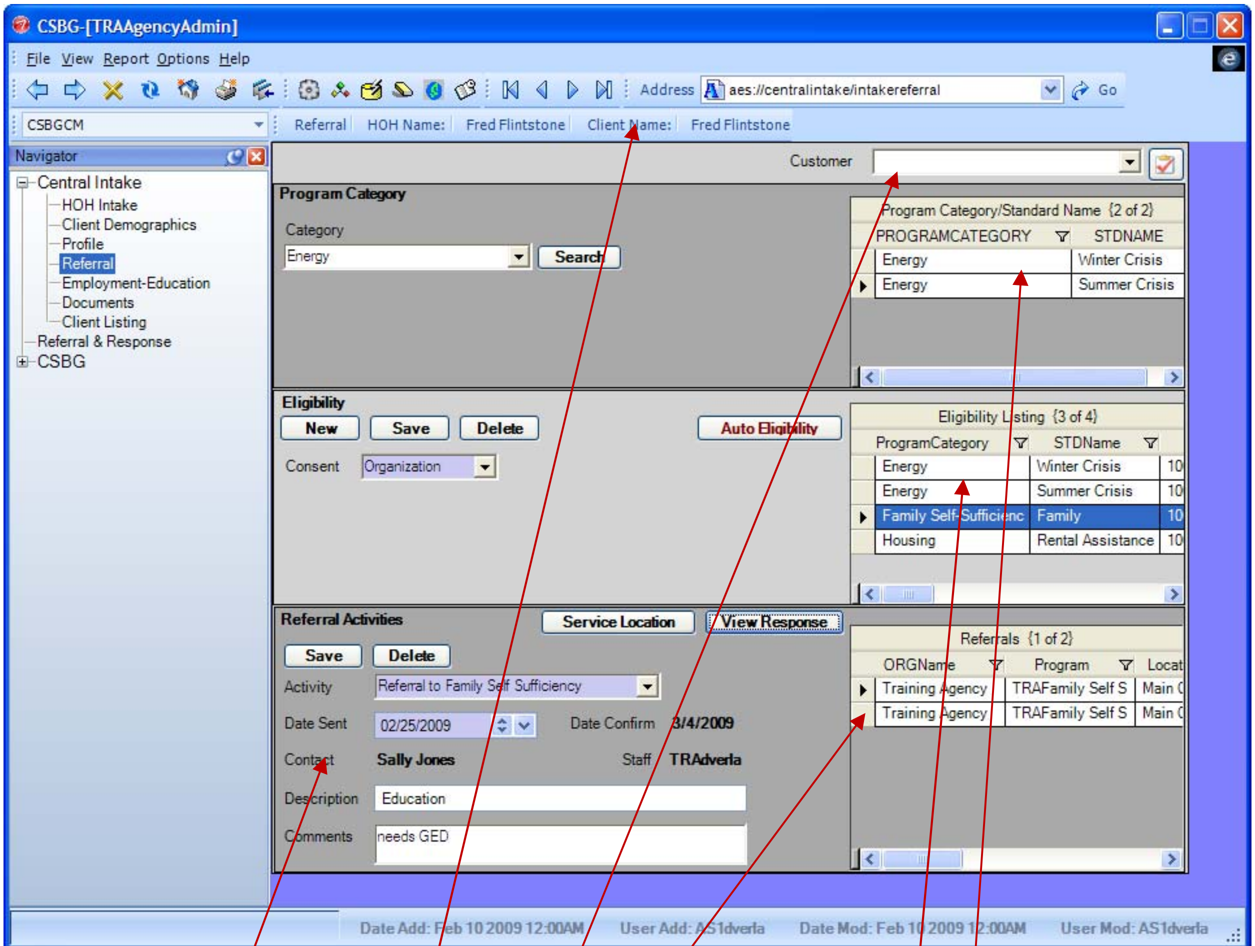
Schedule an Appointment

1. Make sure correct Client is selected
2. Click APPOINTMENT DETAIL button 
3. In popup window, enter Start Date and time
4. After appointment, click to create checkmarks in checkboxes
5. Enter times for Appointment Check-In, Kept and Ended
6. Enter number of minutes
7. Click SAVE button
8. Click CLOSE when finished



Create Referrals

The Referral page is for referring Clients to other Programs or Activities, both internal and external. After the Client has completed the initial Assessment, potential Referral Sources can be set up automatically on this page. Activities appearing in the dropdown have been designated on the Program Setup page or are the name of the external Program.



Navigating the Referral Page

- HOH and active Client are listed at top of page
- Select different Client in customer dropdown
- All available Categories will be listed in the Category dropdown in the top section
- All available selections for the selected Program Category will be displayed in the PROGRAM CATEGORY/STANDARD NAME GRID
- All Combinations the client is eligible to be referred to will be displayed in the ELIGIBLE LISTING GRID
- Referrals will be created in the Service Location popup window accessible with the Service Location button
- Referrals will be displayed in REFERRALS GRID the after being created
- Details about the selected Referral will appear in the lower left section

If the Client has completed an entire Assessment on the Profile page, go to *Automatically generate all possible Referral sources* section below.
If the Client has a profile record on the profile page, but no questions were answered, go to *Manually select possible Referral sources* section below.

Automatically generate all possible Referral sources

Automatic Referrals can be set up only if an Assessment has been completed on the Client.

1 Make sure correct Client is selected
  a Use dropdown at top of page to select Customer
  b Head of Household is listed in Status Bar
2 In the middle section, select Consent Level
3 Click the AUTO ELIGIBILITY button

All Category/STD Name combination this Client is eligible to be referred to, based on the answers given in the Assessment, will appear in the ELIGIBILITY LISTING GRID. Those conditions have been set up in advance with the Assessment and the Program Setup page Details section.

4 Select the item to use in the ELIGIBILITY LISTING GRID
5 Go to *Create Referral* section below

Manually select possible Referral sources

1 Make sure correct Client is selected
  a Use dropdown at top of page to select Customer
  b Head of Household is listed in Status Bar
2 In the top section, select Category
3 Click SEARCH button
  a A list of Standard names matching the category will appear in the PROGRAMS CATEGORY/STANDARD NAME GRID
4 Select the item to use in the PROGRAMS CATEGORY/STANDARD NAME GRID

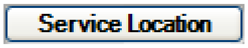
In the middle section:

5 Click NEW button
6 select Consent Level
7 Click the SAVE button

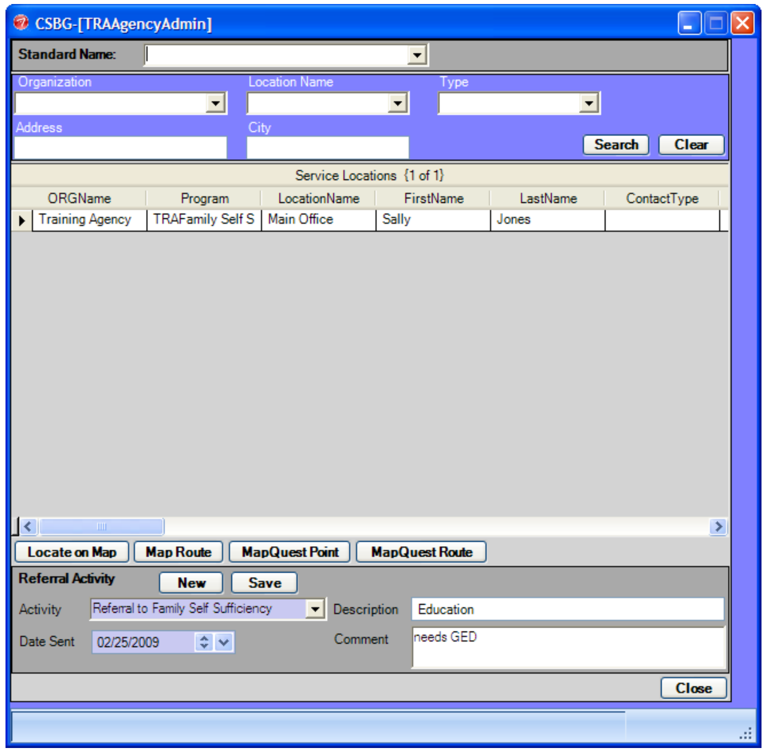
All Category/STD Names this Client is eligible to be referred to will appear in the ELIGIBILITY LISTING GRID. Those combinations have been set up in advance.

8 Select the item to use in the ELIGIBILITY LISTING GRID
9 Go to *Create Referral* section below

Create Referral

1 Make sure correct Client is selected
 a Use dropdown at top of page to select Customer
 b Head of Household is listed in Status Bar
2 Make sure correct Category/STD name combination has been selected in the ELIGIBILITY LISTING GRID
3 Click SERVICE LOCATION button 

4 In the popup window:
 a All available Locations for this Referral are displayed in the SERVICE LOCATIONS GRID



5 Filter the list by selecting any of the parameters in the top blue section, then click SEARCH
 a Use CLEAR to clear all search fields and begin a new search
6 Map any location or route using Microsoft MapPoint or MapQuest in Internet browser:
 a Select the Location(s) to map
 b Click LOCATE ON MAP or MAPQUEST button to Map
 c Click MAP ROUTE or MAPQUEST ROUTE button to create route
7 Click NEW button
8 Select Activity
9 Enter Description
10 Select Date Sent
11 Enter Comment
12 Click SAVE button
13 Select other Standard Name in dropdown at top of window to create referrals in that Standard Name if needed
14 Click CLOSE button when finished

Referral information will automatically populate onto Referral page.

View Referral Response

If a Response has been created, a Date Confirm will be displayed.

Make sure correct Referral is selected in the REFERRALS GRID.

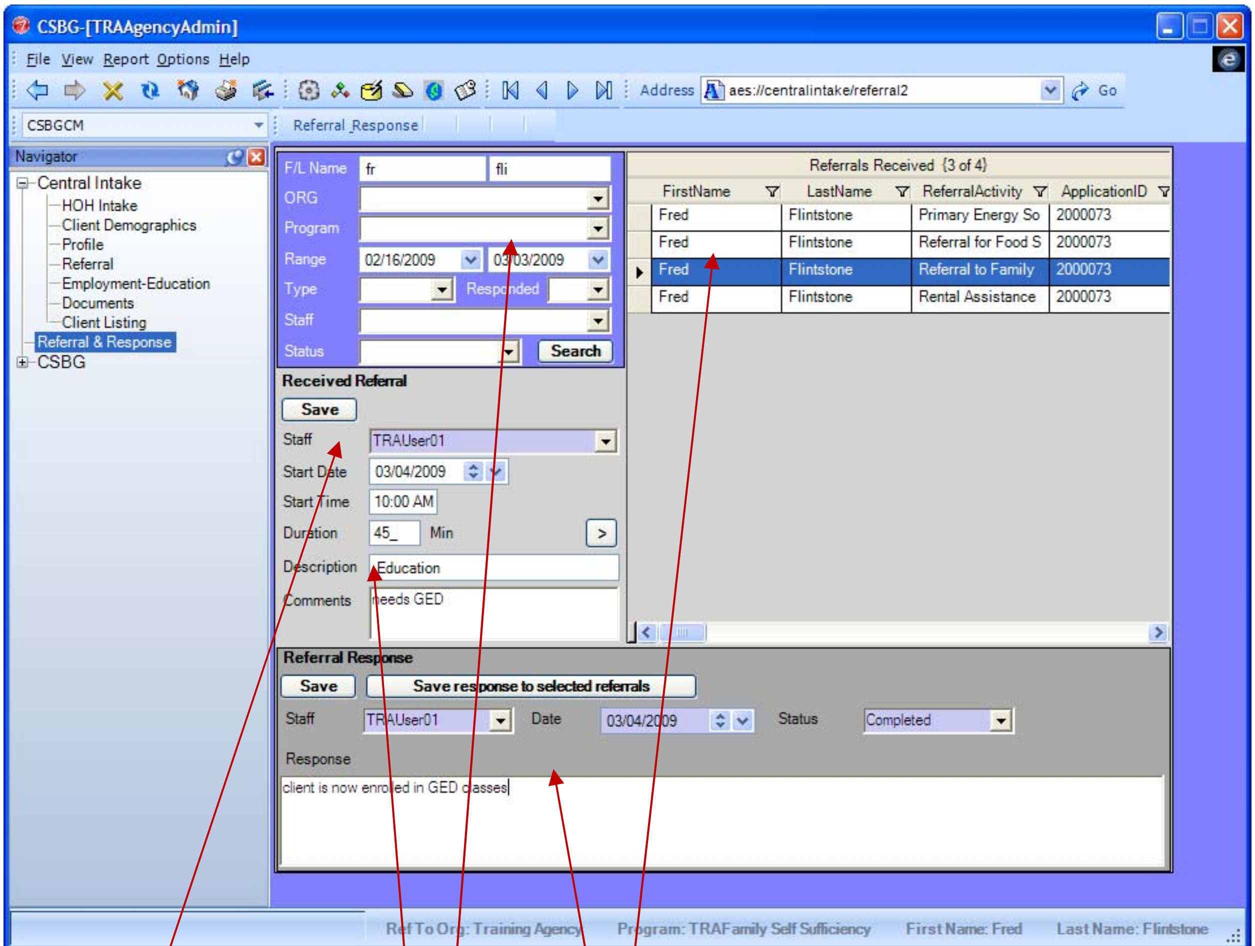
1 Click VIEW RESPONSE button
 a The response cannot be changed or edited, only viewed
2 Click CLOSE button when finished

Edit or Delete Referral Record

1 Select Referral in REFERRALS GRID
2 Make necessary changes
3 Click SAVE button
4 To delete record, click DELETE button

Referral & Response Page

The Referral & Response page allows users to look up a referral, both external and internal, made on a Client and respond to it by making an appointment and/or comments. The View Response button on the Referral page is a popup that allows the User to see the response made to the referral.



Navigating the Referral & Response Page

- Search for Referrals in the upper blue section
- All matching Referrals will be displayed in the REFERRALS RECEIVED GRID
- Create appointments in the middle section
- View or create a response to a Referral in the bottom section
- Staff and Date entered here will appear on Services page for Response Activity

Find Referral

There are several ways to search for referrals, select the search criteria, and then click SEARCH:

1 To find all Referrals for a particular Client:
   a Enter Client First and/or Last Name
      i) The entire name does not need to be entered
2 To find all Referrals for one Agency or Program:
   a Select Agency and/or Program
3 To find all Referrals during a range for Dates:
   a Enter Start and End Dates of time period
4 To find all Referrals made to external sources or to internal Programs:
   a Select External in Type dropdown for external sources
   b Select Internal in Type dropdown for internal Programs
5 To find all Referrals to which Responses have been made:
   a Select Yes or No
6 To find all Referrals made by a Staff Member
   a Select User Name in Staff dropdown
7 To find all Referrals with a particular Status
   a Select Status in dropdown

Referrals matching criteria will appear in REFERRALS RECEIVED GRID

Create a Client Appointment

After the Referral is received, an appointment can be made.

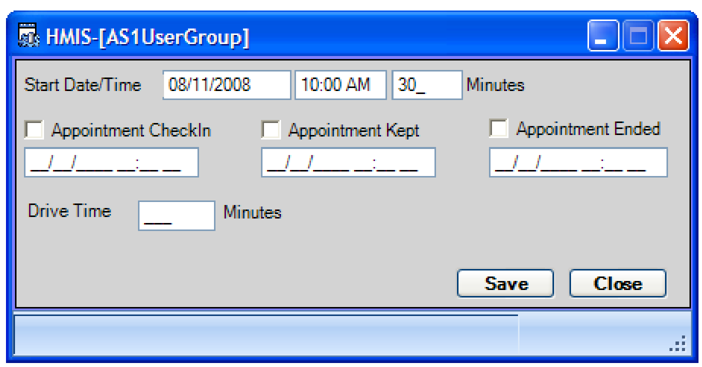
1 Make sure correct Referral is selected in REFERRALS RECEIVED GRID
2 In the middle container, enter the requested data for the future appointment
3 Description and comments appear automatically from the Referral page information
4 Click SAVE

Enter Appointment detail information

Make sure correct Client and appointment are selected.

1 Click SHOW APPOINTMENT DETAIL button 

2 In popup, start date and time will appear automatically if entered on main page
3 Click to create checkmark in Appointment Check in, Kept and/or Ended checkboxes
4 Enter dates and times in check in, kept and/or ended fields
5 Enter Drive Time in minutes
6 Click SAVE button
7 Click CLOSE button when finished



Respond to initial Referral

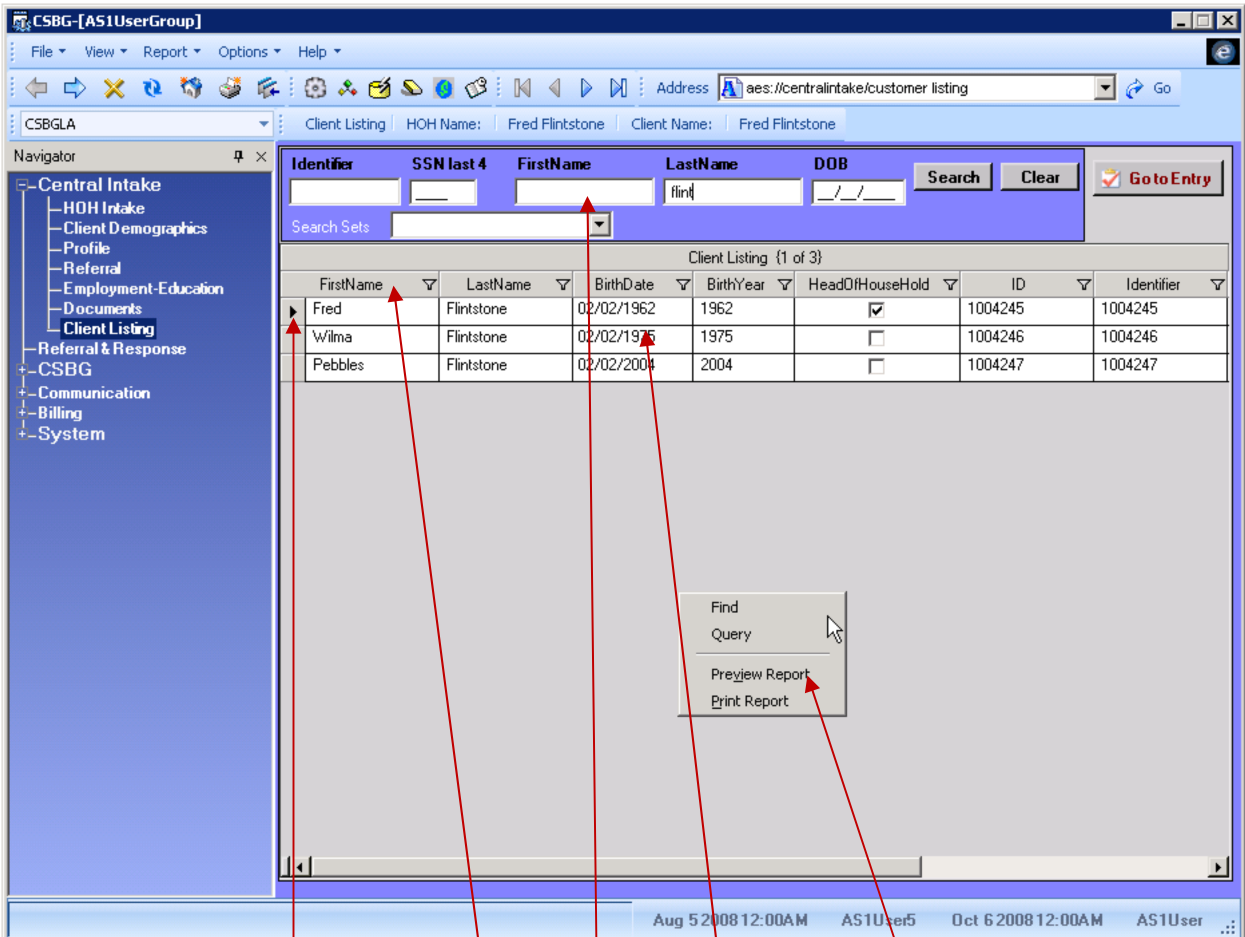
Make sure correct Referral(s) is selected in REFERRALS RECEIVED GRID

1 Select Staff
2 Select Date of response
3 Select Status of response
4 Enter Response information
5 Click SAVE to save to one Referral or SAVE RESPONSE TO SELECTED REFERRALS to save to multiple Referrals

This response will be available via the VIEW RESPONSE button on the Referral page.

Search for Clients

The Client Listing page is the most thorough place to search for Clients and will list all Clients in the system that the User has access to see based on Security Rights. Clients can be sorted by any existing criteria. Select the Client record in the CLIENT LISTING GRID to use on any other pages in the Central Intake section. If the record appears "grayed out" on the Intake page, use the ADD button to add permission for your Organization to use the Client record.



Navigating the Client Listing Page

- Search by any combination of parameters in top blue section
- All Clients matching search criteria will be displayed in the CLIENT LISTING GRID
- Sort the records by clicking on any Column Heading
- Find and Query functions are available on the right click menu and offer more search ability
- When selecting a Client record, make sure to click in the gray box located at the left edge of the row so the entire row is highlighted in blue

Quickly search for a Client

1. Enter any one or more of:
   a. Client Identifier
   b. Social Security Number – last four digits
   c. First Name and/or Last Name
   d. Date of Birth
2. Click SEARCH button
   a. All matching Clients will appear in CLIENT LISTING GRID
   b. If more than50 matches appear, sets of the total matches will appear in the Search Sets dropdown
3. To remove search criteria and start a new search, click CLEAR

> ➤ *Always start a Client Intake with a search to avoid duplicate entries*
>
> ➤ *The entire name does not need to be entered, sometimes just a few letters will find the correct Client*
>
> ➤ *To see all Clients, just click SEARCH*

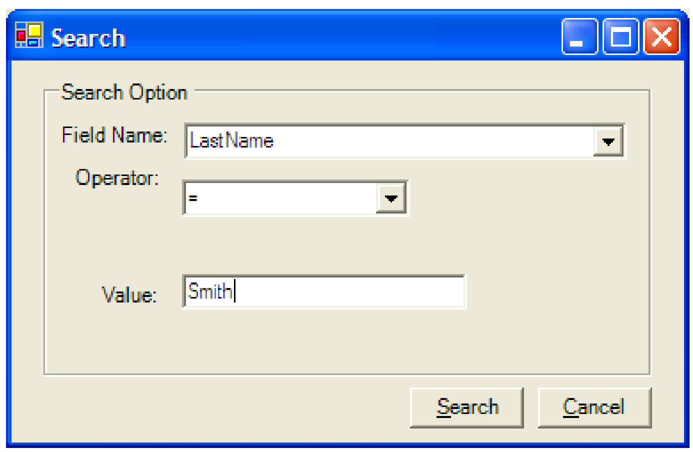
Sort Clients appearing in the Grid

1. Click a Column Heading to sort by that item
   a. A small arrow will be visible on the right side of the column heading showing the sort order
2. Click again to sort in the reverse order

Revise Columns by Width or order in Grid

1 Place cursor at right edge of Column Heading – it will turn into a cross
1 Drag to right or left until desired width
OR
2 Click a Column Heading to move to a different location in the Grid
3 Drag Column Heading to new location
Columns will not stay in this order o size for the next login

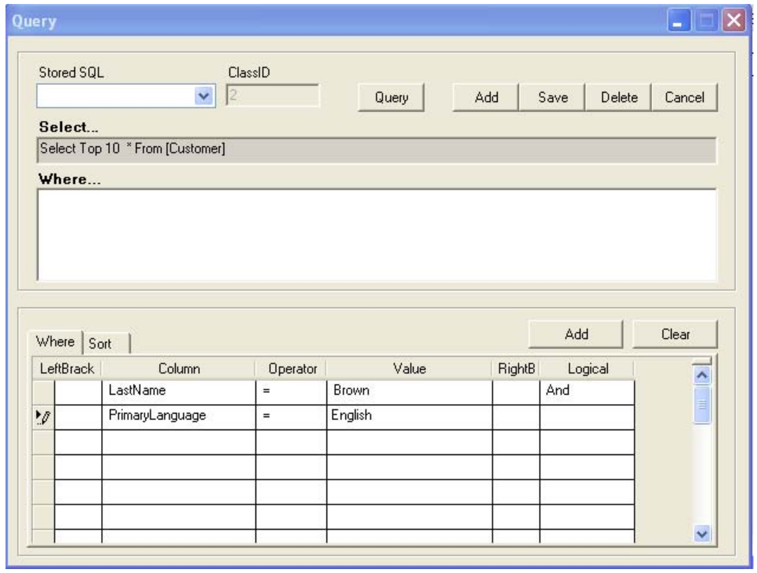
Search by other Criteria



1. Right Click
2. Select FIND
3. In the Dialog box, select or enter the three fields:
4. **Field Name** = all the criteria available to be searched
5. **Operator** = how to match
   a. **=** Equal to, will match exactly
   b. **!=** Not Equal to, will not match
   c. **>** Greater than
   d. **<** Less than
   e. **>=** Greater than or equal to
   f. **<=** Less than or equal to
   g. **Like** uses **%** as a wildcard character, so entering M% matches Mike, Michael, MMM; it is not case sensitive so M%T% is the same as m%t%, both will match maaaaaTxx
   h. **Not Like** is the reverse of Like
   i. **Between** and **Not Between** is useful for ranges of data
   j. **Is Null** lists all records with no entry for that field
   k. **Is Not Null** lists all records that do have an entry for that field
6. **Value** = what to match
   a. Enter the text to match the parameter chosen for the Field Name
7. Click SEARCH

Matching Clients will appear in CLIENT LISTING GRID

Search by more than one Criteria



1 Right Click
2 Select QUERY
3 In the popup window:
4 Select the WHERE tab
5 Left Bracket are needed only when creating complex queries to group items
6 Column = 1st parameter to search by in the dropdown (i.e. last name, race, gender)
7 Operator = how to match (*see descriptions in Search by other Criteria*)
8 Value = what to match (i.e. Mary)
9 Right Bracket are needed only when creating complex queries to group items
10 To add another parameter, select AND or OR in Logical column
  a AND = Client must match ALL criteria
  b OR = Client must match ANY one or more of the criteria
11 Add additional Criteria if needed
12 Click ADD button when finished
  a Use CLEAR to remove criteria
13 To add a Sort parameter:
  a Click SORT tab
  b Select the parameter to sort by in the dropdown
  c Click the >> button (<< removes a parameter)
  d Click ADD
14 Click QUERY to begin the search

Enter Client into a Program

1 Make sure correct Client is selected in CLIENT LISTING GRID
2 Click GO TO ENTRY button