



Consumer and I&R Intake Procedure User Guide

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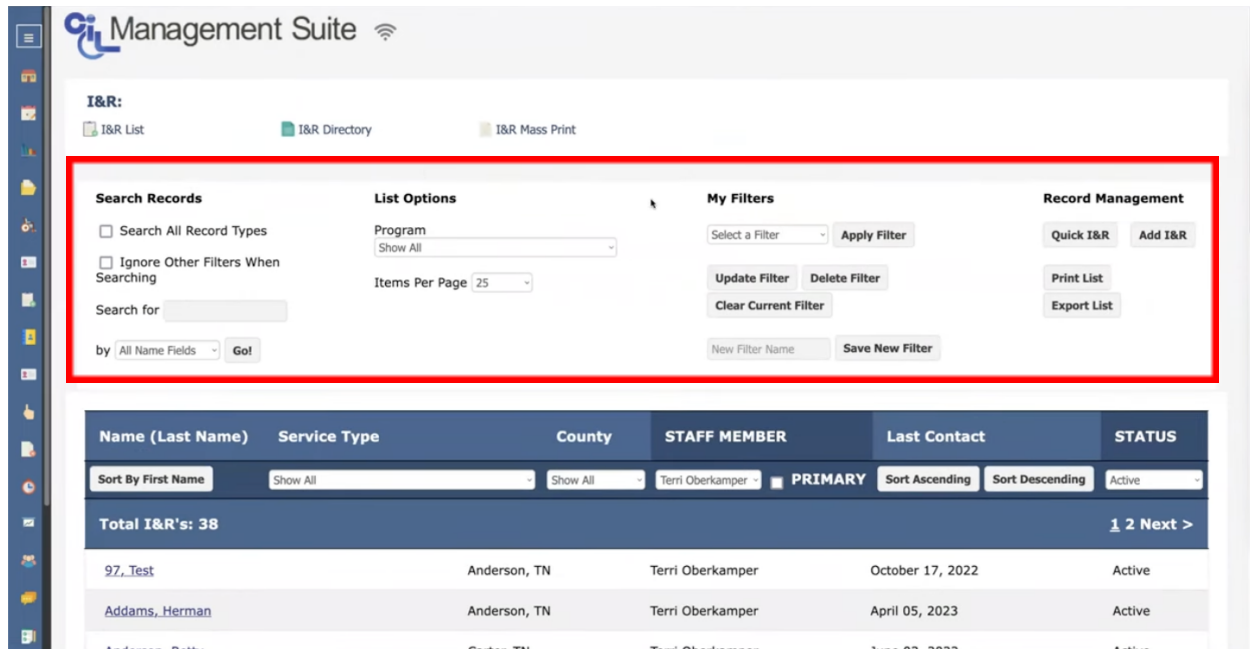
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1 Navigating the I&R Main Page

Section 1 will look at the features on the I&R page.

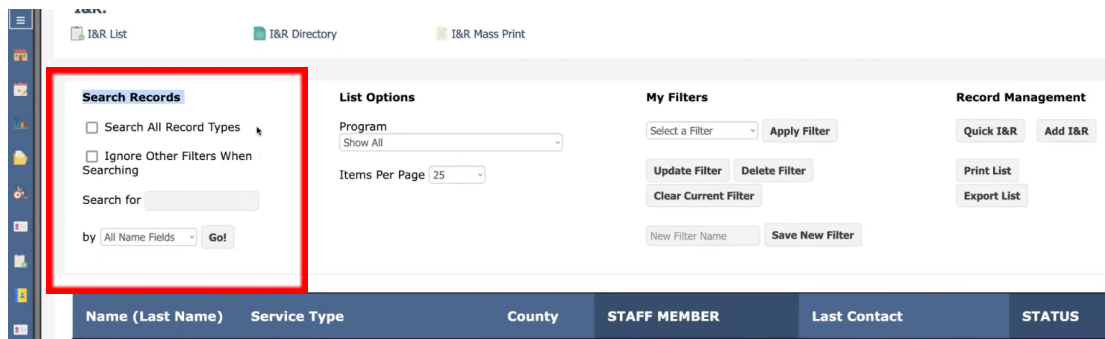
The I&R main page has multiple stacks or columns with different controls on the page for searching or displaying records.



I&R Main Page Features

1.1 Search Records

The first column has to do with searching records.

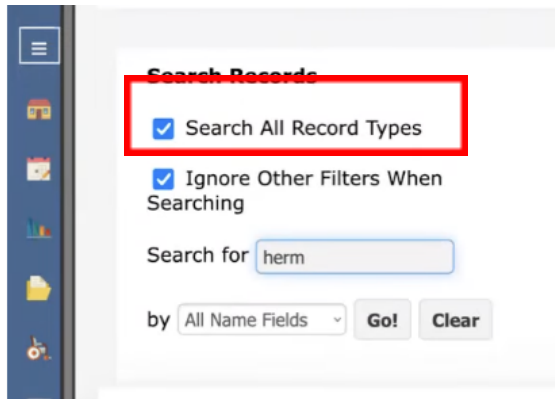


I&R Main Page - Search Records

By default, when you look for a record, it will only look for your consumers or I&Rs, and it will only look for ones that are active

If you would like to do a wider search, there a couple of options you can use:

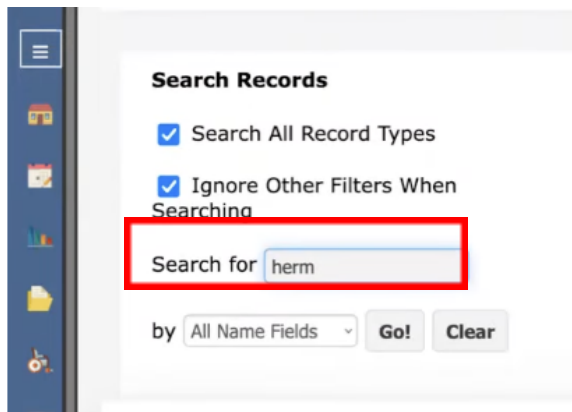
- Search All Record Types: will search Consumer and I&R records at the same time
- Ignore Other Filters When Searching: looks at both active and non-active records, and at records assigned to other staff members



Search All Record Types

When you check both boxes, that is the broadest search you can do.

—To search for records, start typing the name on the record in the “Search for” box



Search for box

The results of the search will have the name, location, staff member, last contact, and status.

After the name, in parentheses, it will say whether the record is a Consumer or I&R.

The screenshot shows the 'I&R Main Page' interface. At the top, there are four main sections: 'Search Records', 'List Options', 'My Filters', and 'Record Management'. The 'Search Records' section has checkboxes for 'Search All Record Types' and 'Ignore Other Filters When Searching', a search input field containing 'herm', and a 'by' dropdown set to 'All Name Fields'. The 'List Options' section includes a 'Program' dropdown set to 'Show All' and an 'Items Per Page' dropdown set to '25'. The 'My Filters' section has a 'Select a Filter' dropdown, an 'Apply Filter' button, and buttons for 'Update Filter', 'Delete Filter', 'Clear Current Filter', 'New Filter Name', and 'Save New Filter'. The 'Record Management' section has buttons for 'Quick I&R', 'Add I&R', 'Print List', and 'Export List'. Below these sections is a table with the following columns: 'Name (Last Name)', 'Service Type', 'County', 'STAFF MEMBER', 'Last Contact', and 'STATUS'. The table is sorted by 'First Name' in ascending order. The first four rows are highlighted in blue, and the first two rows are enclosed in a red box. The first row is 'Addams, Herman (I&R)' with staff member 'Terri Oberkamper' and last contact 'April 05, 2023'. The second row is 'I&R, Herman (I&R)' with staff member 'Mike Southern' and last contact 'April 18, 2017'. The third row is 'Mouse, Mickey Herman (Consumer)' with staff member 'Terri Oberkamper' and last contact 'March 07, 2023'. The fourth row is 'Munster, Herman (Consumer)' with staff member 'Terri Oberkamper' and last contact 'March 25, 2019'. Below the table, it says 'Total I&R's: 4'.

Name (Last Name)	Service Type	County	STAFF MEMBER	Last Contact	STATUS
Addams, Herman (I&R)		Anderson, TN	Terri Oberkamper	April 05, 2023	Active
I&R, Herman (I&R)			Mike Southern	April 18, 2017	Other
Mouse, Mickey Herman (Consumer)		Anderson, TN	Terri Oberkamper	March 07, 2023	Complete Goals
Munster, Herman (Consumer)		Cheatham, TN	Terri Oberkamper	March 25, 2019	Active

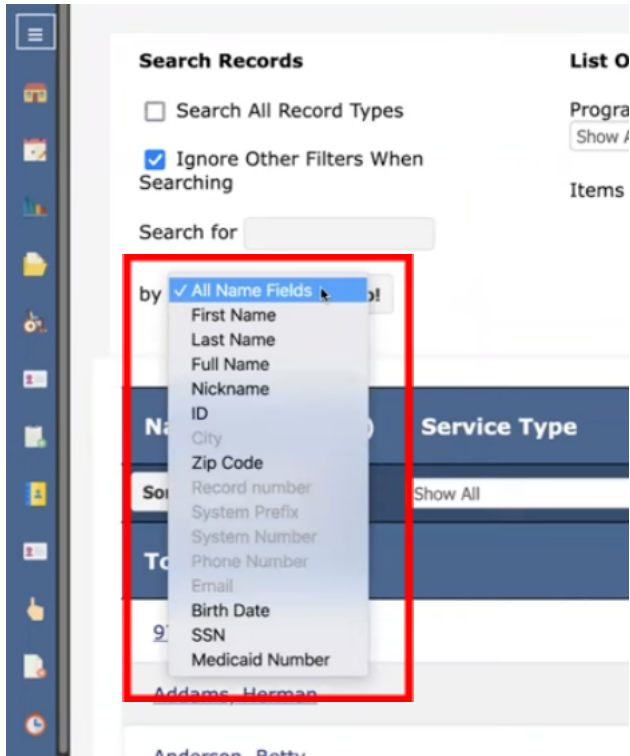
I&R Main Page

—When you’re done with your search, click “Clear” and that will take you back to your default set up

This screenshot is a close-up of the 'Search Records' section of the 'I&R Main Page'. It shows the search input field with 'herm' and the 'by' dropdown set to 'All Name Fields'. The 'Go!' and 'Clear' buttons are highlighted with a red box.

Clear Search Records

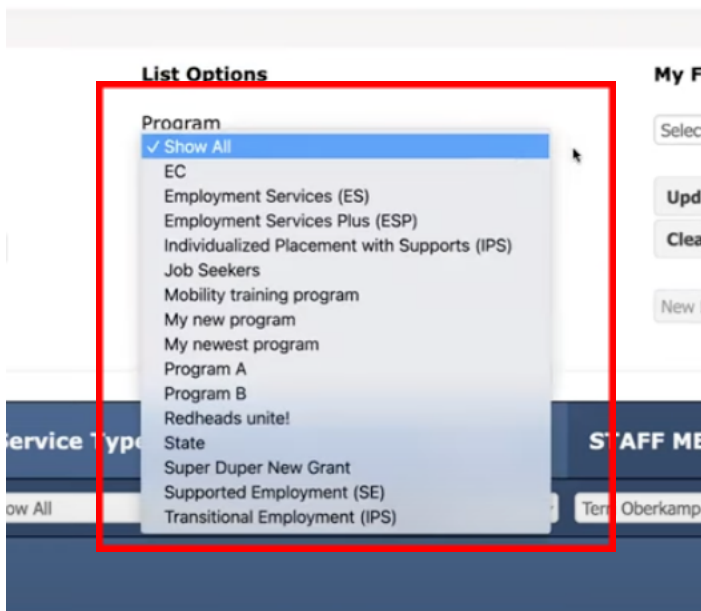
You can search for a record by choosing one of the following: all name fields, first name, last name, nickname, ID, zip code, Birth Date, SSN, Medicaid Number, etc.



Search Records By Dropdown

1.2 List Options

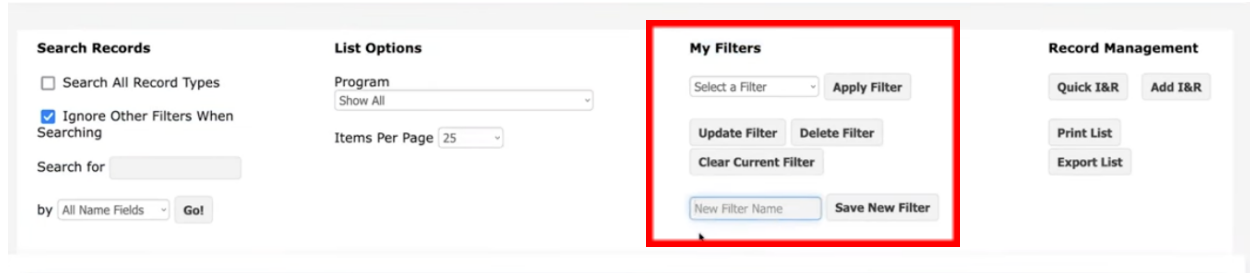
If people are members of a program, you can narrow it down to display only people who are in that specific program:



View List Options

1.3 My Filters

This section will let you override our default settings.

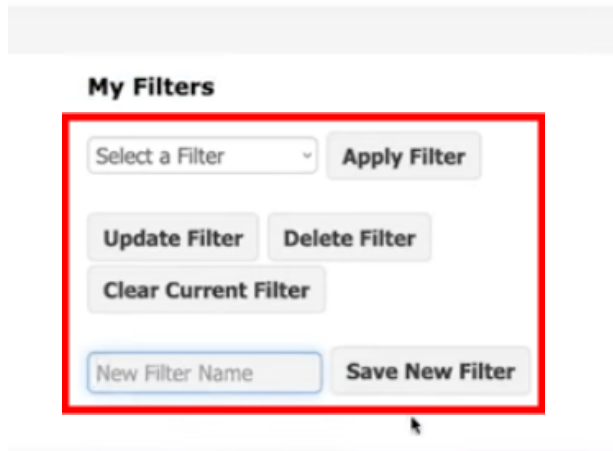


The screenshot shows a web application interface with four main sections: Search Records, List Options, My Filters, and Record Management. The 'My Filters' section is highlighted with a red border. It contains a dropdown menu labeled 'Select a Filter', an 'Apply Filter' button, and three buttons: 'Update Filter', 'Delete Filter', and 'Clear Current Filter'. At the bottom of the 'My Filters' section, there is a text input field labeled 'New Filter Name' and a 'Save New Filter' button. The 'Search Records' section includes checkboxes for 'Search All Record Types' and 'Ignore Other Filters When Searching', a search input field, and a 'Go!' button. The 'List Options' section has a 'Program' dropdown menu and an 'Items Per Page' dropdown menu set to 25. The 'Record Management' section includes buttons for 'Quick I&R', 'Add I&R', 'Print List', and 'Export List'.

My Filters

For example, you could change the page layout, sort order, or settings for dropdowns to what you prefer.

- Click “Select a Filter”
- Type a new filter name
- Click “Save New Filter”



This is a close-up view of the 'My Filters' section from the previous screenshot. It shows the 'Select a Filter' dropdown menu, the 'Apply Filter' button, and the 'Update Filter', 'Delete Filter', and 'Clear Current Filter' buttons. At the bottom, the 'New Filter Name' text input field and the 'Save New Filter' button are visible. A red border highlights the entire 'My Filters' section.

Search Using My Filters

To use a saved filter, select it from the drop-down list, then click the “Apply Filter” button.

1.4 Record Management

This is the section you use to create a new I&R Record.

The screenshot shows a web interface with four main sections: Search Records, List Options, My Filters, and Record Management. The Record Management section is highlighted with a red border and contains buttons for Quick I&R, Add I&R, Print List, and Export List.

Record Management

There are two buttons you can click to add a new record:

- “Add I&R”: very detailed, 3 pages long, lets you capture things about housing, employment status, etc. that the Quick I&R doesn’t cover
- “Quick I&R”: doesn’t cover all those things, if it’s just a phone call, in many cases you’ll want to use the Quick I&R

*See 2.1 for how to create a “Quick I&R” record

2 Creating an I&R Record

This section will show you how to create an I&R record using “Quick I&R”

2.1 Create a Quick I&R

—Click “Quick I&R” to create a new record

You will be taken to this page:

Management Suite

I&R:

I&R List I&R Directory I&R Mass Print

Quick I&R Add

Contact Type: No Type

First Name: (required) If you don't enter a name, it will be saved as "Unknown I&R".

Middle Name or Initial:

Last Name:

County: Unknown

Show/Hide Contact Info

Primary Staff: Terri Oberkamper

Contact Method: Standard (U.S. Post Office mail)

Start Date: 05/18/2023

Quick I&R Add

— Click “Contact Type” dropdown to determine what type of contact you are adding the record for.

*If there are any contact types not listed that you would like added, contact your local Admin.

Quick I&R Add

Contact Type:

- ✓ No Type
- Consumer (self)
- Educator
- Employer
- Rep or Family Member
- Service Provider
- Vendor
- Other

First Name: (required) If you do

Middle Name or Initial:

Last Name:

County: Unknown

Show/Hide Contact Info

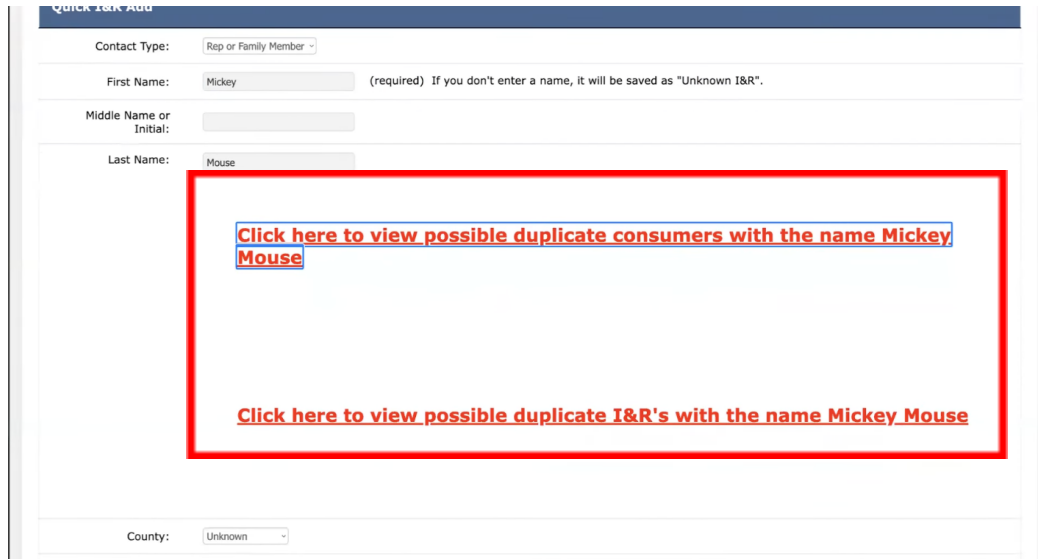
I&R: Contact Type

—Input the First, Middle, and Last Name

*If you don't enter a first or last name, the system will automatically use the name of “Unknown I&R”

2.2 Duplicate Record Message

After entering a name, if it is a duplicate record, this message will appear:



The screenshot shows a web form titled "Quick Add" with the following fields: "Contact Type" (set to "Rep or Family Member"), "First Name" (set to "Mickey"), "Middle Name or Initial" (empty), and "Last Name" (set to "Mouse"). A red-bordered box highlights a message that reads: "Click here to view possible duplicate consumers with the name Mickey Mouse" and "Click here to view possible duplicate I&R's with the name Mickey Mouse". At the bottom of the form, the "County" is set to "Unknown".

I&R: Duplicate Record Message

—Click on links to view possible duplicate records

*For those using Jaws, or other screen readers, you will get a popup dialog box instead of a written field.

2.3 Enter County and Contact Information

—Select a county if they give you that information

The counties that will appear in the dropdown are all those that exist in your database.

County Information

If they give you any other contact information, you can add that as well.

—Click “Show/Hide” Contact Info to input additional contact information

I&R: Show/Hide Contact Info

Additional contact fields will appear:

I&R: Contact Info

For each phone number section, you can indicate if the phone number can receive texts or not.

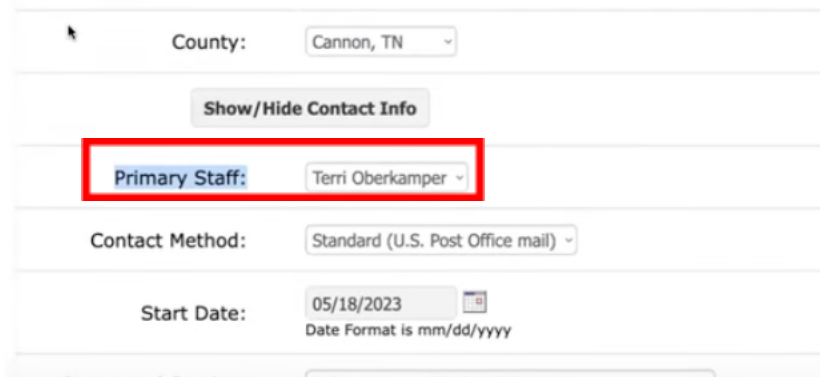
There are additional sections for address, city, zip code, email.

They may opt in/out of the mailing lists and bulk emails.

*Duplication checks are performed on phone numbers and email addresses in addition to the name.

2.4 Choose a Primary Staff Member

—Indicate who will be working with this person moving forward by clicking on the dropdown list of staff members.



The screenshot shows a form with the following fields:

- County: Cannon, TN
- Show/Hide Contact Info button
- Primary Staff: Terri Oberkamper (highlighted with a red box)
- Contact Method: Standard (U.S. Post Office mail)
- Start Date: 05/18/2023 (Date Format is mm/dd/yyyy)

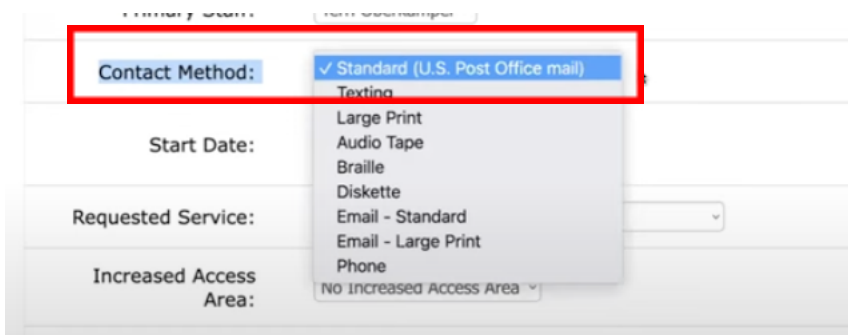
I&R: Primary Staff Member

You may be able to tell which staff member it should be assigned to based on the question being asked by the consumer. For example, if the person has a question about housing, you may have a staff member dedicated to housing questions and concerns.

When you assign a staff member, this staff member will get a reminder notification that they have been assigned as a primary staff member for someone and the notification will include a link to the newly created record.

2.5 Choose Contact Method

—Choose how to contact the I&R by clicking on the dropdown list for contact method.



The screenshot shows a form with the following fields:

- Contact Method: Standard (U.S. Post Office mail) (highlighted with a red box)
- Start Date:
- Requested Service:
- Increased Access Area: NO Increased Access Area

The dropdown menu for Contact Method is open, showing the following options:

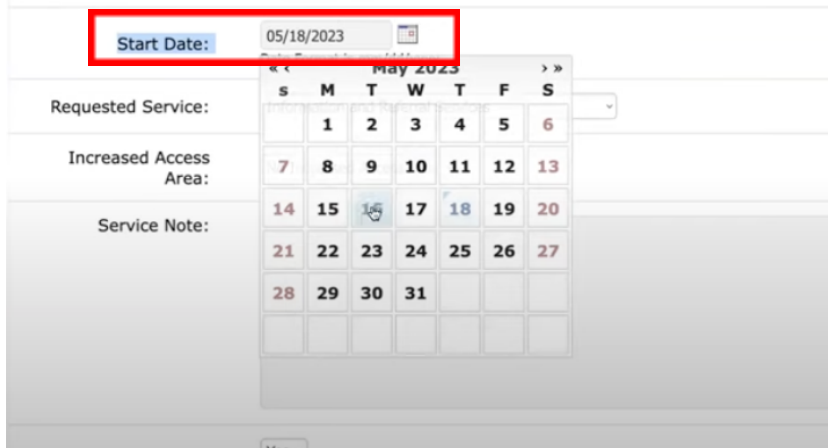
- Standard (U.S. Post Office mail) (checked)
- Texting
- Large Print
- Audio Tape
- Braille
- Diskette
- Email - Standard
- Email - Large Print
- Phone

I&R: Contact Method

*This list of contact methods is under the control of your local database Admins, so if there are options you don't do or would like to have on this list, contact them.

2.6 Start Date

—Input the date by either typing the date directly or you can use the calendar pop up to select the correct date. This will default to the current date.



The screenshot shows a form with a 'Start Date' field highlighted in red, containing the date '05/18/2023'. Below the field is a calendar pop-up for May 2023. The calendar has a grid with days of the week (S, M, T, W, T, F, S) and dates from 1 to 31. The date 15 is selected, and a mouse cursor is over it. The form also includes fields for 'Requested Service:', 'Increased Access Area:', and 'Service Note:'.

I&R: Start Date

*This record can be backdated if needed.

2.7 Requested Service

County: Cannon, TN

Show/Hide Contact Info

Primary Staff: Terri Oberkamper

Contact Method: Standard (U.S. Post Office mail)

Start Date: 05/15/2023

Requested Service: Information and Referral Services

Increased Access Area: No Increased Access Area

Service Note: (required)

Allow Time Tracking: **If "Yes" is selected then this will allow time to be tracked against this service.**

Log Time Entry: No

I&R: Requested Service

Because this is an I&R record, all services attached to that record automatically go under Information and Referral Services.

—Click the dropdown to see a list of services they may be asking questions about.

County: Cannon, TN

Show/Hide

Primary Staff:

Contact Method:

Start Date:

Requested Service:

- mobility impairment mobility training
- Mobility training
- My new service
- New Service Type
- Other
- Peer Counseling Services
- Personal Assistance Services
- Physical Restoration Services
- Preventive Services
- Prostheses, Orthotics, and other appliances
- Recreational Services
- Rehabilitation Technology Services
- Service type 2
- Something
- Therapeutic Treatment**
- Transition from high school to college
- Transportation Services
- Visual impairment mobility training
- Vocational Services
- Youth/Transition Services

Increased Access Area:

Service Note: (required)

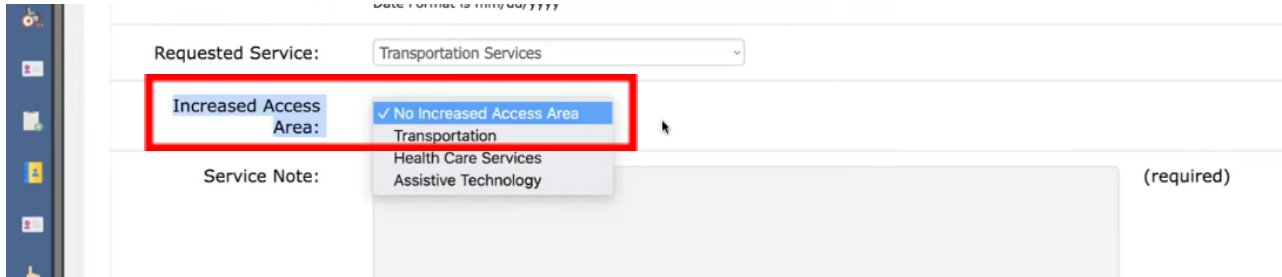
I&R: Requested Service Dropdown

This section is helpful for follow-up and so that local admins can run a service report looking at typical areas of concern for I&Rs.

2.8 Increased Access Area

This section feeds into the federal reporting system.

—Click the dropdown to see a list of access areas they may need. If none of them apply, click “No Increased Access Area”



Requested Service: Transportation Services

Increased Access Area: No Increased Access Area
 Transportation
 Health Care Services
 Assistive Technology

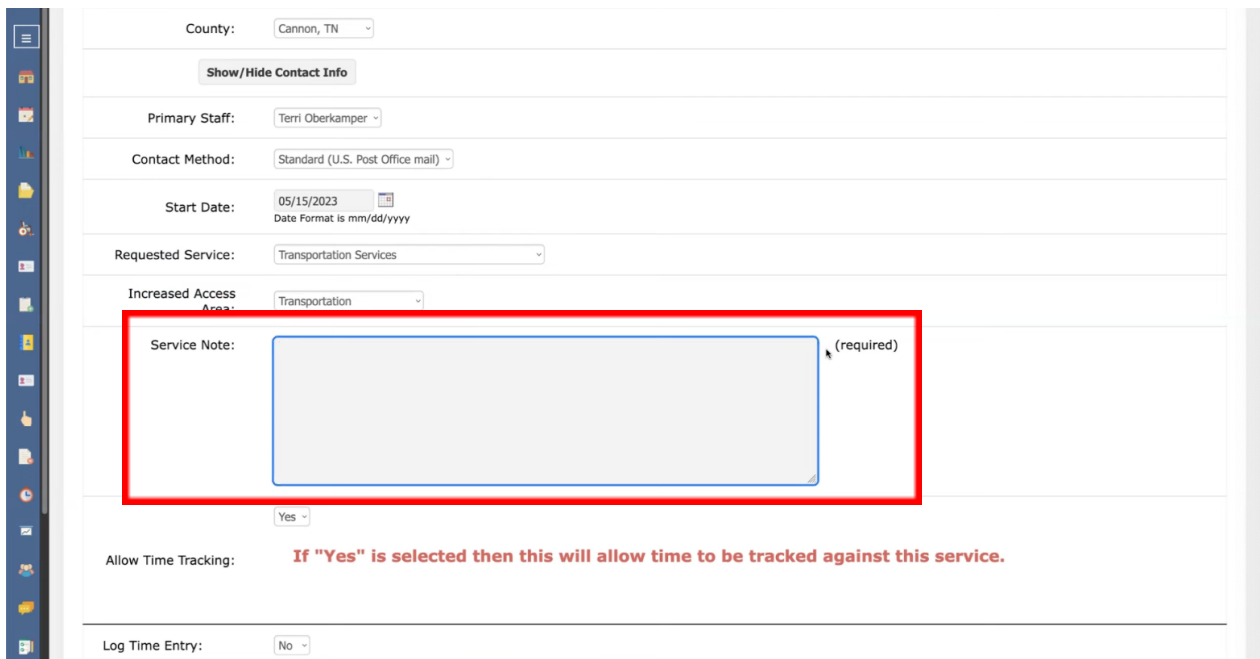
Service Note: (required)

I&R: Increased Access Area

2.9 Note Field

This page will create both the I&R record and a service request. All service requests require a note.

—Add your follow-up notes in the note field.



County: Cannon, TN

Show/Hide Contact Info

Primary Staff: Terri Oberkamper

Contact Method: Standard (U.S. Post Office mail)

Start Date: 05/15/2023
Date Format is mm/dd/yyyy

Requested Service: Transportation Services

Increased Access Area: Transportation

Service Note: (required)

Yes

Allow Time Tracking: **If "Yes" is selected then this will allow time to be tracked against this service.**

Log Time Entry: No

I&R: Service Note Field

2.10 Allow Time Tracking and Create Time Entry

This allows you to track the time you spent offering services.

—Click yes to allow time tracking.

I&R: Allow Time Tracking

*You might not have this on your database. If you would like this section added, talk to your local database admins.

—Change “Log Time Entry” from “No” to “Yes”

—Indicate how long you spent in hours or fractions of hours (for example, if you spent 30 minutes, the time should be indicated as 0.50)

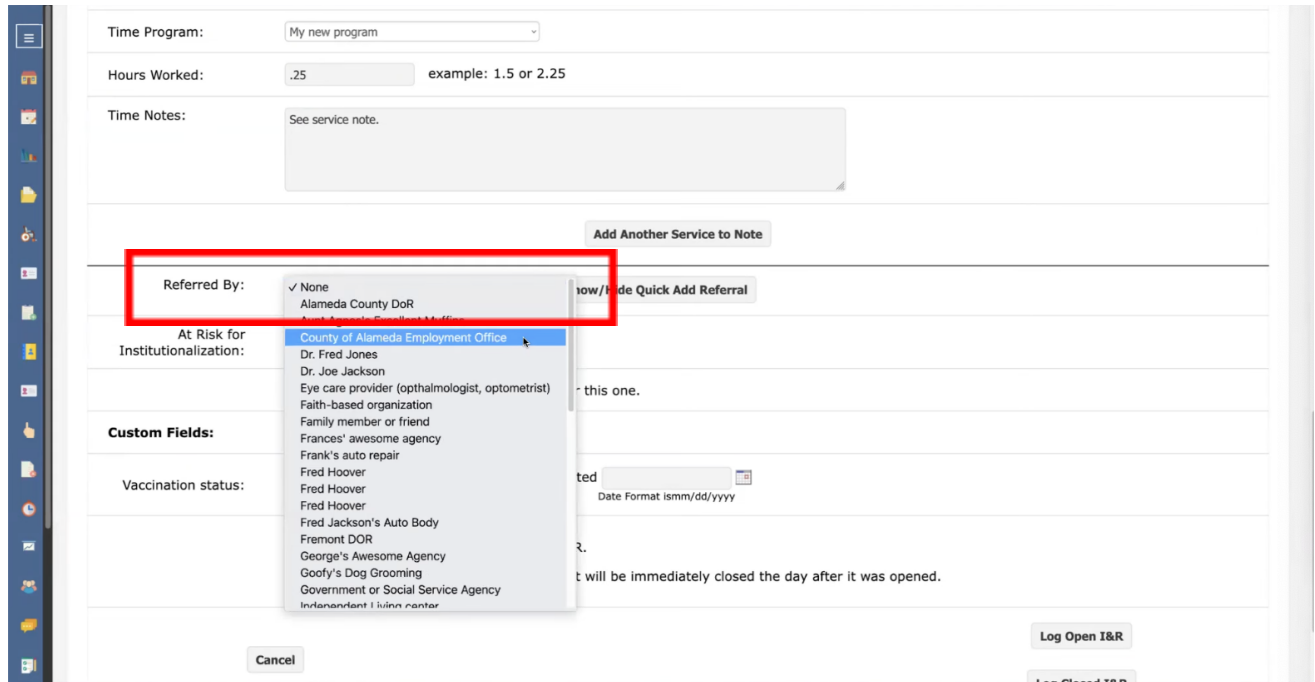
—Add a note to the “Time Notes”

— Click “Add Another Service to Note” to select additional service types and add a batch of services at the same time. All of them will refer to the Service Note, so make sure it includes everything you discussed with the I&R.

I&R: Time Entry

2.11 “Referred By” Dropdown

This section is populated from your center’s Referral Contacts page and this will indicate which organization referred this person to your center.

A screenshot of a web-based form for recording an Intake & Referral (I&R). The form includes fields for 'Time Program' (set to 'My new program'), 'Hours Worked' (set to '.25'), and 'Time Notes' (containing 'See service note.'). A red box highlights the 'Referred By' dropdown menu, which is open and shows a list of options including 'None', 'Alameda County DoR', 'County of Alameda Employment Office', 'Dr. Fred Jackson', 'Dr. Joe Jackson', 'Eye care provider (ophthalmologist, optometrist)', 'Faith-based organization', 'Family member or friend', 'Frances' awesome agency', 'Frank's auto repair', 'Fred Hoover', 'Fred Hoover', 'Fred Hoover', 'Fred Jackson's Auto Body', 'Fremont DOR', 'George's Awesome Agency', 'Goofy's Dog Grooming', 'Government or Social Service Agency', and 'Independent Living center'. Other form elements include 'At Risk for Institutionalization', 'Custom Fields', 'Vaccination status', and buttons for 'Log Open I&R' and 'Log Closed I&R'.

I&R: Referred By Dropdown

- Click on the dropdown for “Referred By” to indicate who referred the person
- Check the box for “At Risk for Institutionalization” if needed
- If you would like to create another I&R record right after this current one, check this box that says “Check this box to create another I&R after this one.”

2.12. Custom Fields

If you would like to create custom fields, such as a vaccination status field, etc. then you can contact your local database admins to request those fields be added to the I&R intake form.

2.13 Create Record

To create the record, you have two choices:

1. “Log Open I&R” – creates an active record, meaning you will do follow-up with them, they may call back, or you are not sure if the record should be closed or not.

2. “Log Closed I&R” – creates a record that closes automatically on the following day (most centers only use this if it’s completely anonymous, there is no way to follow up with the record)

Referred By: County of Alameda Employment Office Show/Hide Quick Add Referral

At Risk for Institutionalization:

Check this box to create another I&R after this one.

Custom Fields:

Vaccination status: Vaccinated (required) Date Reported 05/15/2023
Date Format ismm/dd/yyyy

Log Open I&R: This will create an active I&R.
Log Closed I&R: This will create an I&R that will be immediately closed the day after it was opened.

Cancel Log Open I&R Log Closed I&R

ESP Privacy Policy | Terms & Agreements Font Size: 100% Feedback

I&R: Log Open/Closed I&R

—Click “Log Open I&R”
Great job! You’ve created a brand new I&R record.

Here is the basic layout of an I&R record:

[Go to I&R Tabs](#)

I&R

[Show All Fields](#)
[Set Reminder](#)
[Make Private](#)
[Edit Record](#)
[Change into Consumer](#)
[Record Document Center](#)
[Delete Record](#)

I&R DEMOGRAPHIC INFORMATION
OTHER I&R INFORMATION

<p>Name: Mickey I&R</p> <p>Phone 1:</p> <p>Phone 2:</p> <p>Email:</p> <p>County: Cannon, TN (Update County History)</p> <p>Show Mailing Address</p> <p>Current Status: Active</p> <p>Race(s): None</p> <p>Ethnicity: Unknown</p> <p>Older Blind (OIB): No</p> <p>Center Surveys: View Center Surveys</p> <p>Exclude from Bulk Emails: No</p> <p>Templates: hello Print Template</p> <p>Size of Household:</p> <p>Primary Staff: Terri Oberkamper</p>	<p>Additional Information: Edit</p> <p>I&R Image: Manage Image</p> <p>ID Number: 618</p> <p>Start Date: May 15, 2023</p> <p>Last Contact Date: May 15, 2023</p> <p>ILP Status: Unknown</p> <p>ILP Target Date:</p> <p>Age:</p> <p>Gender: Unknown</p> <p>Pronouns:</p> <p>Primary Language: Unknown</p> <p>Housing Status: Other</p> <p>Employment Status: Other</p> <p>PPR/704 Record: Yes</p> <p>Registered Voter: No</p>
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I&R Record

3 Create a New Consumer Record

—Click “Consumers” in the main menu bar on the left:

- Home
- Calendar & News
- Reports
- Documents
- Equipment
- Consumers**
- I&R
- Referral Contacts
- Alt Contacts
- Attendants
- Complaints
- Time Tracking
- Community Activities
- Group Events

I&R:
[I&R List](#) [I&R Directory](#) [I&R Mass Print](#)

Search Records

Search All Record Types

Ignore Other Filters When Searching

Search for:

by: All Name Fields [Go!](#)

[Clear](#)

List Options

Program: Show All

Items Per Page: 25

My Filters

Select a Filter [Apply Filter](#)

[Update Filter](#) [Delete Filter](#)

[Clear Current Filter](#)

New Filter Name:

[Save New Filter](#)

Record Management

[Quick I&R](#)

[Add I&R](#)

[Print List](#)

[Export List](#)

Name (Last Name)	Service Type	County	STAFF MEMBER	Last Contact	STATUS
<div style="display: flex; justify-content: space-between; align-items: center;"> Sort By First Name Show All Show All Show All Sort Ascending Show All </div>					
PRIMARY					
<div style="display: flex; justify-content: space-between; align-items: center;"> Total I&R's: 37 1 2 Next > </div>					
Grouse, Mickey (Consumer)		Anderson, TN	Mike Southern	July 13, 2022	Active

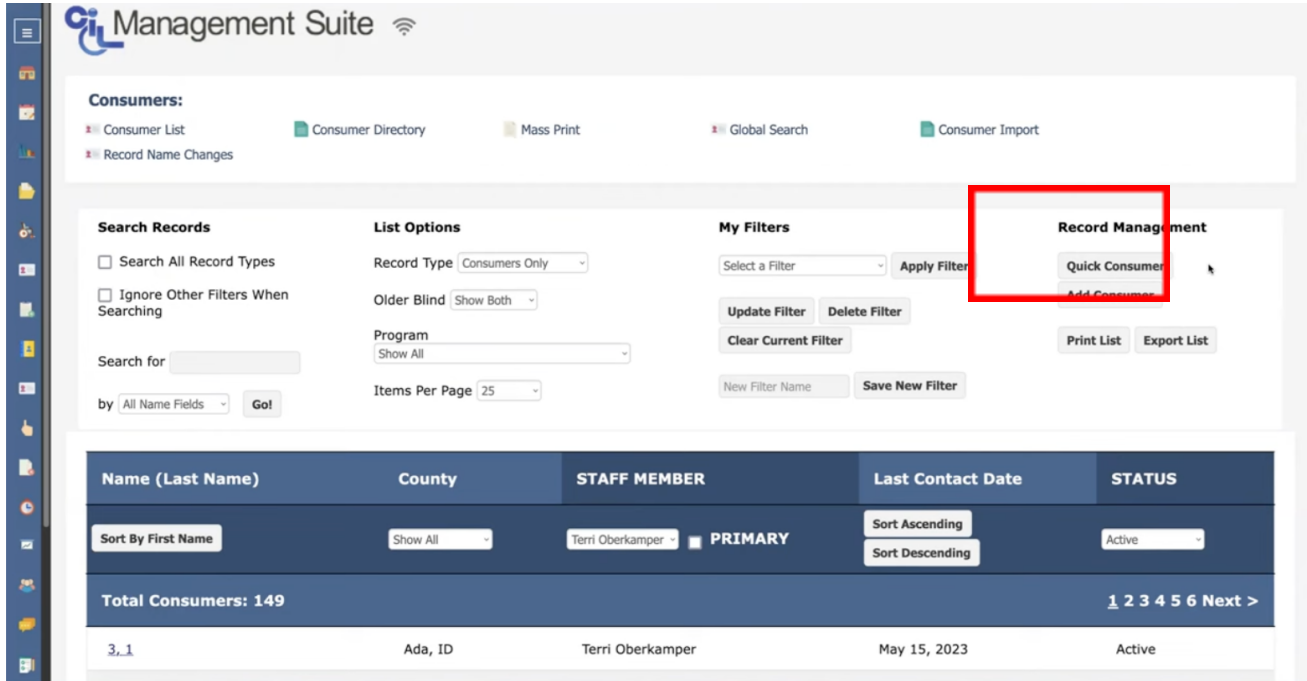
Main Menu: Consumers

20

The Consumer main page has the same basic page layout as I&R (see tips in Section 1 of this document for how to navigate this page).

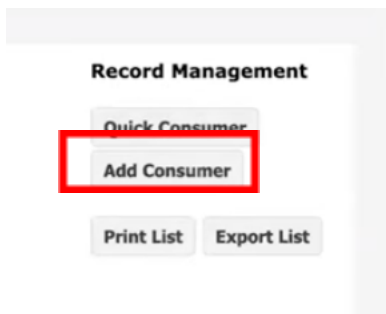
There are two options for adding a new Consumer Record (just like in Section 1.4):

- “Quick Consumer” form: won’t use that often, will give you a very basic consumer form but only has very limited information – won’t be able to capture housing/employment status or other things
- “Add Consumer” form: used more often



New Consumer Record Options

—Click on “Add Consumer”



Add Consumer

3.1 Consumer Information – Page 1 of 3

— Click “Show All Intake Fields” if you’d like to see all possible intake fields that could possibly be on the form.

Please note that all fields not marked as “(required)” are optional. Not all fields are used by every center. Your local database admins can decide which fields should be visible and which should be required, using the “Custom Intake Forms” feature in Configuration.

Page 1 starts off with a few checkboxes:

- **Count as Consumer** – this box is automatically checked. If you uncheck the box, it will create a third type of consumer record that is called a non-consumer record. Non-consumer records aren’t counted on federal or state reports.
 - Some centers use “non-consumer” records to account for aides, family members, attendants, etc. that may accompany the consumer to some activities.
- **PPR/704 Record** – this box is automatically checked. This makes sure this record gets counted on any state or federal reports.
- **Older Blind (OIB)** – this checkbox will be on your database if the center provides the specific services available to people 55 years and older with significant sight impairment.

Consumer Information (Step 1/3) Show All Intake Fields Step 2 -->

Count as Consumer:

PPR/704 Record: If checked this record will show on the PPR/704 and any state reports that match the PPR/704 numbers. Only uncheck this box if you DO NOT want this record to show on the PPR/704.

Older Blind (OIB):

Start Date: 05/18/2023 Date Format is mm/dd/yyyy (required)

First Name: (required)

Middle Name or Initial:

Last Name: (required)

Nickname:

Phone 1 Title: ex. Mobile, Home etc.

Phone 1 Instructions: ex. Only call after 5 PM Max 255 characters

(555) Phone 1 can receive text/SMS

Consumer Information Step 1

—Click on “Start Date” to enter the date. (See section 2.6, same as I&R record)

—Enter “First Name” and “Last Name”

—Enter a “Nickname” if they have a preferred one

Consumer Information (Step 1/3) Show All Intake Fields Step 2 -->

Count as Consumer:

PPR/704 Record: If checked this record will show on the PPR/704 and any state reports that match the PPR/704 numbers. Only uncheck this box if you DO NOT want this record to show on the PPR/704.

Older Blind (OIB):

Start Date: 05/18/2023 Date Format is mm/dd/yyyy (required)

First Name: (required)

Middle Name or Initial:

Last Name: (required)

Nickname:

Phone 1 Title: ex. Mobile, Home etc.

Phone 1 Instructions: ex. Only call after 5 PM
Max 255 characters

Phone 1: (555) Phone 1 can receive text/SMS

Consumer Information Step 1

—Input phone number information (Title, Instructions, and Phone Number)

First Name: Dora (required)

Middle Name or Initial:

Last Name: Duck (required)

Nickname:

Phone 1 Title: Cell phone ex. Mobile, Home etc.

Phone 1 Instructions: ex. Only call after 5 PM
Max 255 characters 0

Phone 1: (555) Phone 1 can receive text/SMS

Phone 2 Title: ex. Mobile, Home etc.

Phone 2 Instructions: ex. Only call after 5 PM
Max 255 characters

Phone 2: (555) Phone 2 can receive text/SMS

Physical Address:

Consumer Information Phone Info

—Input address information (see explanation of address information below)

- Title Field – can describe the address (homeless, care facility, apartment complex, etc.)

- Instructions – field to input information for what would you need to know if you’re doing an in-home visit, accessibility of the residence, reminder that they have pets in the house, etc. or anything you need to know before you do a home visit with them.
- Physical Address – Fill in the address. May need to manually fill it in if it doesn’t automatically populate the county and zip code options.

— The “Mailing Address is same as Physical Address” box is checked by default. If unchecked, a second set of address fields will appear for you to input the mailing address.

The screenshot shows a form with the following fields:

- Physical Address Title: [text input]
- Physical Address Instructions: [text area]
- Physical Address 1: [text input]
- Physical Address 2: [text input]
- Physical County: [dropdown menu, value: Unknown] (required)
- Physical City: [dropdown menu, value: Select a City]
- Physical Zip Code: [dropdown menu, value: Select a Zip Code]
- Mailing Address is same as Physical Address:

 A 'Lookup' button is located to the right of the Physical Zip Code field.

Consumer Info Address

— Input a Record Number, if desired (the number doesn’t have to be just numbers; it can hold up to 50 characters. This field can be used as an additional information field.)

—Input email address (there is a section for a secondary email if necessary)

The screenshot shows a form with the following fields:

- Record Number: [text input]
- Email: [text input]
- Secondary Email: [text input]

 The 'Record Number' field is highlighted with a red rectangular box.

Consumer Info Record Number

—Input additional information such as:

- Check box to exclude from mailing lists
- Check box to exclude from bulk emails
- Check box if they are head of household
- Indicate the size of the household.

Consumer Info Exclude Lists

3.2 Demographic Info – Page 2 of 3

—Move to Page 2 by clicking on “Step 2”

Consumer Info Page 2

—Input “Date of Birth” by typing it in or using the pop-up calendar.

Consumer Info Date of Birth

*If you put the date in as younger than the OIB category (see page 1) and you’ve checked the box for OIB, you will receive the notice.

Consumer Info OIB Notice

- Input Social Security number
- Input Medicaid number

*Your center may or may not have these fields.

Consumer Info Social Security

- Input Veteran Status by clicking on the dropdown
- Input ILP Status (this field is required) by clicking on the dropdown. There are three options:

Consumer Info: ILP Status

—Input ILP Target Date

Consumer Info: ILP Target Date

—Indicate the gender by clicking on the dropdown:

- Federal system only allows male and female

—Enter the “Pronouns” into the text field

—Enter the “Ethnicity” by clicking on the dropdown. The dropdown shows either “Hispanic/Latino” or “Other”. If you choose “Other” you choose from the “Race” list below.

Veteran: Non-Veteran (never served in US military) -

ILP Status: ILP signed - (required)

ILP Target Date: 05/17/2024

Gender: Female - (required)

Pronouns: She/Her/Hers

Ethnicity: Select an ethnicity - (required)

Race:
 American Indian/Alaska native
 Asian
 Black or African American
 Native Hawaiian or other Pacific Islander
 White
 Unknown/Declined to Respond (required)
 The list of races is created from the PPR/704 report, no other races are available than these. (required)

Primary Language: None -

Language(s) Used:
 ASL
 English
 Esperanto
 French
 German
 Italian
 Japanese
 Klingon
 Mandarin (Chinese)
 Spanish

Consumer Info: Gender/Ethnicity

- Indicate the “Primary Language” by clicking on the dropdown.
- Click the “Languages Used” checkboxes for any additional languages they speak.

Ethnicity: Other - (required)

Race:
 American Indian/Alaska native
 Asian
 Black or African American
 Native Hawaiian or other Pacific Islander
 White
 Unknown/Declined to Respond (required)
 The list of races is created from the PPR/704 report, no other races are available than these. (required)

Primary Language: None -

Language(s) Used:
 None
 ASL
 English
 Esperanto
 French
 German
 Italian
 Japanese
 Klingon
 Mandarin (Chinese)
 Spanish

Marital Status: Unknown -

Housing Status: Other - (required)

Employment Status: Other -

Education Level: Other -

Contact Method: Standard (U.S. Post Office mail) -

Consumer Info: Primary Language

- Indicate the following by clicking on the dropdowns:
 - Marital Status
 - Housing Status
 - Employment Status
 - Education Level

- Contact Method
- Registered Voter
- Income Level
- Income Sources

*List of required fields might be different than the list above. These fields are added by your local admins so they may vary according to your center.

.....
 Unknown/Declined to Respond (required) The list of races is created from the PPR/704 report, no other races are available than these. (required)

Primary Language: English

Language(s) Used:

- ASL
- English
- Esperanto
- French
- German
- Italian
- Japanese
- Klingon
- Mandarin (Chinese)
- Spanish

Marital Status: Single

Housing Status: Dependent - Family/Friends (required)

Employment Status: Other

Education Level: Other

Contact Method: Standard (U.S. Post Office mail)

Registered Voter: N/A

Income Level: Unknown

Income Sources:

- WON THE LOTTO!
- Pension
- SSI
- SSDI
- SSI and SSDI
- Employment

Consumer Info: Additional Info

3.3 Consumer Info for Dora Duck – Page 3 of 3

—Move to Page 3 by clicking on “Step 3”

Income Level: \$10,001 - \$20,000

Income Sources:

- WON THE LOTTO!
- Pension
- SSI
- SSDI
- SSI and SSDI
- Employment

<-- Back Step 3 -->

Consumer Info: Page 3

—Click on Show All Intake Fields

Consumer Info: Show Intake Fields

- Type in the organization that referred them in the “Referred by” box
- Check the box if the consumer is At Risk for Institutionalization

Consumer Info: Referred By

If you have checked the box for “Older Blind (OIB)”, the section for “Older Blind (70B) Information will be on page 3.

- Click on the dropdown to indicate the following:
 - Living Arrangement
 - Visual Impairment Severity
 - Visual Impairment Major Cause

Consumer Info: OIB Info

- Click Done to complete the record

Units approved:

Start date: 05/18/2023 End date:
Date Format is mm/dd/yyyy Date Format is mm/dd/yyyy

Vaccination status: (required)

Date Reported: 05/18/2023
Date Format is mm/dd/yyyy

Consumer Info: Done

3.4 Consumer Info (Services, Goals, Disabilities, and Programs)

— Input their services, goals, disability information, and program memberships, if desired. (This will be covered in another section of the User Guide.)

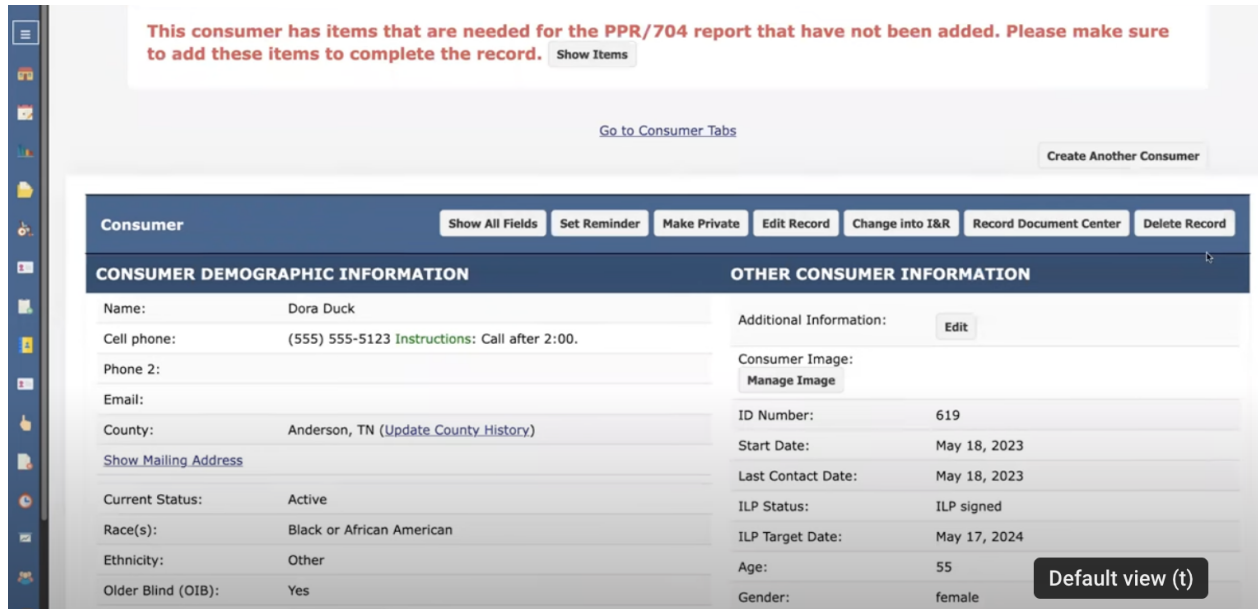
Consumer Info: Services

— Press “Skip”

Consumer Info: Skip

3.5 Consumer Demographic Information Page

This page shows you all the information that you put into the system on pages 1-3 on one page.



Consumer Info Page

4 Features on the Consumer Record

In this section we will go through each of the features on the consumer record.

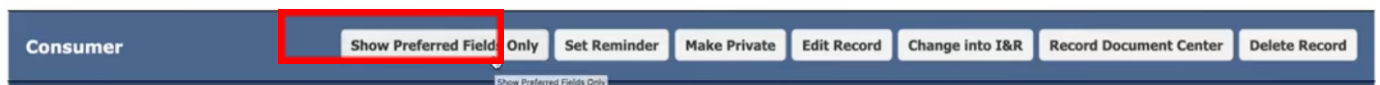
4.1 Show Preferred Fields Only/Show All Fields

—Click “Show All Fields” to see all fields



Consumer: Show All Fields

—Click “Show Preferred Fields Only” to see only the fields you’d like to see. This is set up using the “Preferred Demographic Fields” page in Configuration.



Consumer: Show Preferred Fields

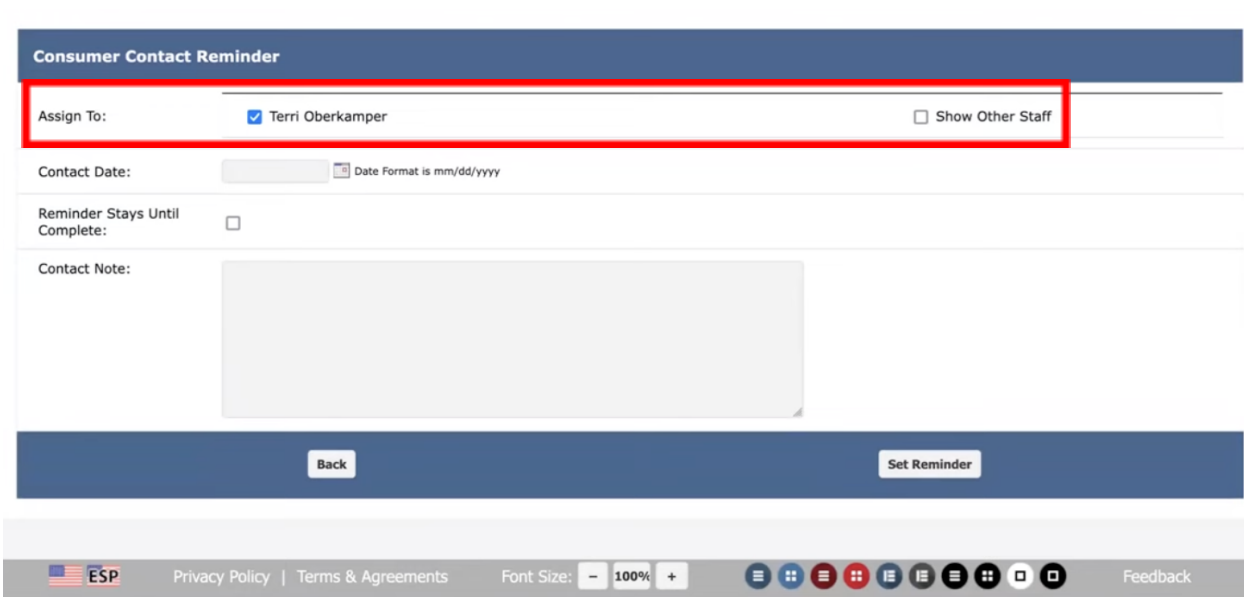
4.2 Set Reminder

—Click “Set Reminder” to set a reminder for yourself or other staff members



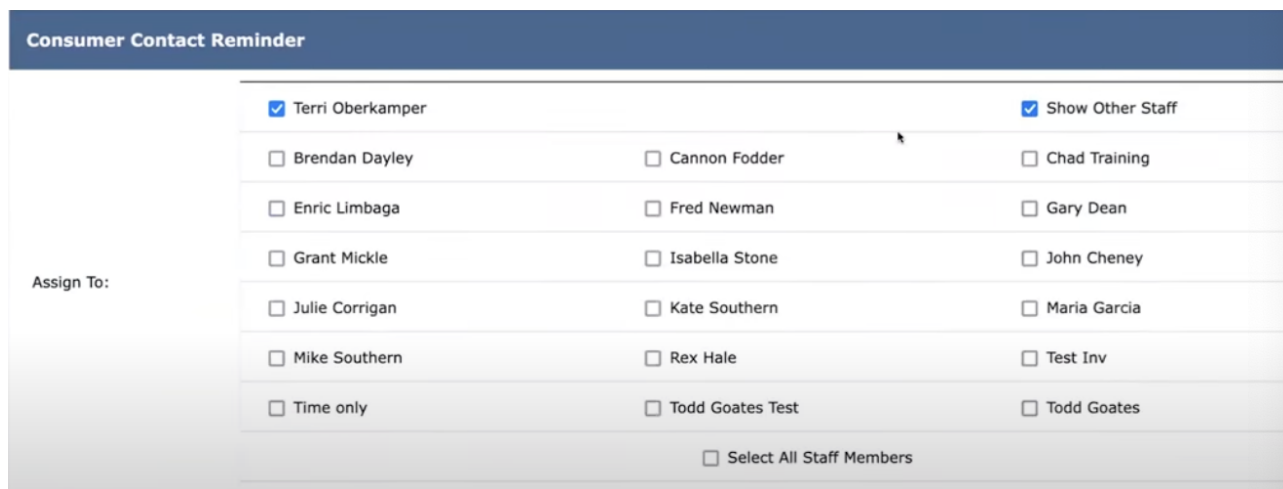
Consumer Info: Set Reminder

—Assign to a staff member by checking the box



Reminder: Assign Staff Member

—Click “Show Other Staff” to assign to another staff member



Reminder: Other Staff

- Set the date for the reminder
- Check the box for “Reminder Stays Until Complete” if desired
- Enter text for the reminder in the “Contact Note” field
- Click “Set Reminder”

Contact Date: 05/31/2023 Date Format is mm/dd/yyyy

Reminder Stays Until Complete:

Contact Note:

Back Set Reminder

Reminder: Contact

4.3 Make Private

—Click “Make Private” to make the record private so that only the assigned staff members and local database administrators would be able to see this record.

Consumer Show All Fields Set Reminder Make Private Edit Record Change into I&R Record Document Center Delete Record

Consumer: Make Private

By default, anyone at your center who is authorized to work with consumers can look at this information, so if you would like to restrict who can see the record, click “Make Private”.

“Make Private” could be used for situations if someone is:

- Underage
- Has a disability that is sensitive in nature
- Sensitive topic on their record such as in a situation of domestic violence

The person’s name on this record will still appear on the consumer list page, but if someone who is not authorized tries to access their record, they will receive a notice saying that they don’t have access to view the record and asking if they would like to leave a Contact Note.

4.4 Edit Record

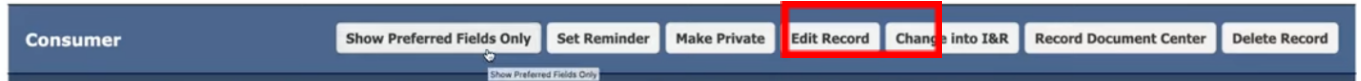
—Click “Edit Record” if there is something you need to update on the intake form.

Consumer Show Preferred Fields Only Set Reminder Make Private Edit Record Change into I&R Record Document Center Delete Record

Consumer: Edit Record

4.5 Change into I&R

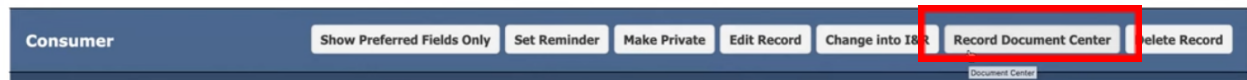
—Click “Change into I&R” to change this consumer record into an I&R record.



Consumer: Change into I&R

4.6 Record Document Center

—Click “Record Document Center” to upload electronic documents related to this individual.

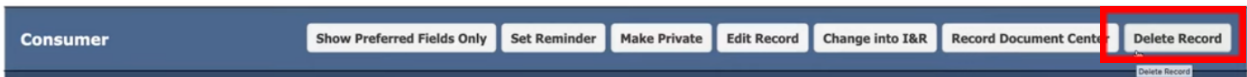


Consumer: Record Document Center

The format or quantity of documents doesn't matter, but there is a max file size per document of 5 megabytes.

4.7 Delete Record

—Click “Delete Record” to delete the record.



Consumer: Delete Record

*Only the primary staff member or administrator will be able to delete the record.

*If you delete a record by accident, there is an audits area in which deleted records can be restored.

4.8 Body of the Record

Within the body of the record, there are a few extra buttons.

Consumer		Show Preferred Fields Only	Set Reminder	Make Private	Edit Record	Change into I&R	Record Document Center	Delete Record
CONSUMER DEMOGRAPHIC INFORMATION				OTHER CONSUMER INFORMATION				
Name:	Dora Duck	Additional Information:		Edit				
Cell phone:	(555) 555-5123 <i>Instructions: Call after 2:00.</i>	Consumer Image:		Manage Image				
Phone 2:		ID Number:	619					
Email:		Record Number:						
Secondary Email:		System Numbers:	Manage Numbers					
Staying with Daffy:	123 Fake St. <i>Instructions: Turn left at stop sign.</i>	Start Date:	May 18, 2023					
Staying with Daffy Line 2:		Last Contact Date:	May 18, 2023					
City:	Norris	ILP Status:	ILP signed					
State/Province:	Tennessee	ILP Target Date:	May 17, 2024					
Zip/Postal Code:	37828	Social Security #:	This consumer has no SSN on file					
County:	Anderson, TN (Update County History)	Date of Birth:	February 01, 1968					
Show Mailing Address		Age:	55					
Current Status:	Active	Gender:	female					
Record Type:	Consumer	Pronouns:	She/Her/Hers					
Race(s):	Black or African American	Primary Language:	English					
Ethnicity:	Other	Language(s) Used:	None					
Contact Type:	No Type							

Consumer: Body of Record

4.8.1 Additional Information

—Click “Edit” by “Additional Information” to input additional information that staff members would need to know about this record.

OTHER CONSUMER INFORMATION

Additional Information:

Consumer Image:

ID Number: 619

Record Number:

System Numbers:

Consumer: Additional Info

Management Suite

Consumers:

Consumer List Consumer Directory Mass Print Global Search Consumer Import

Record Name Changes

Additional Information:

ESP Privacy Policy | Terms & Agreements Font Size: 100% Feedback

Consumer: Additional Info Note

4.8.2 Consumer Image

—Click “Manage Image” under Consumer Image

OTHER CONSUMER INFORMATION

Additional Information:

Consumer Image:

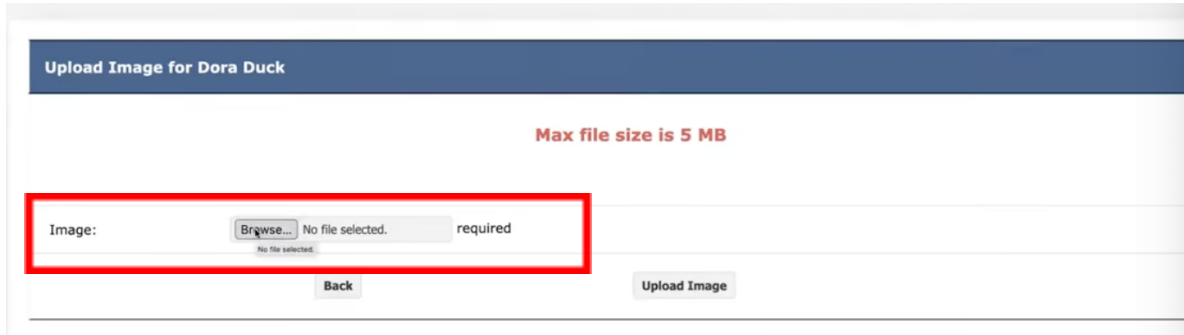
ID Number: 619

Record Number:

System Numbers:

Consumer: Consumer Image

—Upload an image of the consumer by selecting “browse” and then upload the image that is already downloaded on your computer.

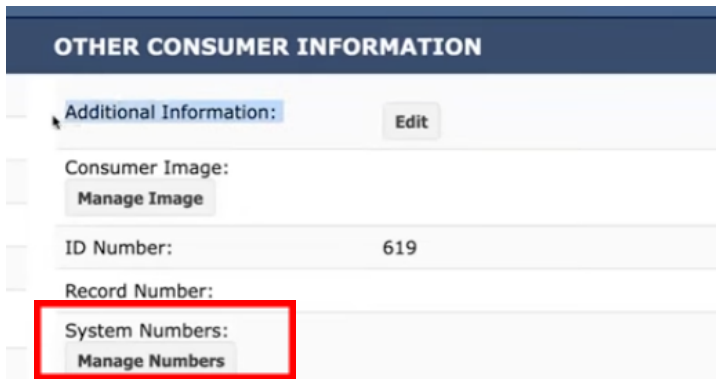


Consumer: Upload Image

4.8.3. System Numbers

(This feature can be used to create an anonymized identifier for the consumer. It may not be in use at your center.)

—Click “Manage Numbers” under “System Numbers” to input a system number.



Consumer: System Numbers

—Click on the dropdown to select a prefix. These prefixes will be different for each center.

—Click “Add Prefix”

Consumer System Numbers for Dora Duck

New Prefix: Prefix B

Add Prefix

Current System Numbers

Back

System Number: New Prefix

The new number will then display on their record.

System Numbers:

Manage Numbers

Prefix B0040;

Consumer: System Numbers

4.8.4 Center Surveys

This section is where surveys that your local database administrators have made can be found.

Contact Type:	No Type	Primary Language:	English
Older Blind (OIB):	Yes	Language(s) Used:	None
Living Arrangement:	Lives with others	Veteran:	Non-Veteran (never served in US military)
OB Surveys:	Create Survey	Medicaid #:	This consumer has no Medicaid number on file
Center Surveys:	View Center Surveys	Marital Status:	Single
Exclude from Mailing Lists:	No	Housing Status:	Dependent - Family/Friends
Exclude from Bulk Emails:	No	Employment Status:	Part-time (competitive)
Templates	hello	Education Level:	Trade/Vocational
	Print Template	PPR/704 Record:	Yes
		Visual Impairment Severity:	Legally Blind (excluding totally blind)

Consumer: Center Surveys

4.8.5 Templates

Some forms may have a “Templates” dropdown. This will allow you to generate a form letter. Your local database administrators can create these documents.

Exclude from Mailing Lists:	No	Employment Status:	Part-time (competitive)
Exclude from Bulk Emails:	No	Education Level:	Trade/Vocational
Templates:	hello	PPR/704 Record:	Yes
	Print Template	Visual Impairment Severity:	Legally Blind (excluding totally blind)
Head of Household:	No	Visual Impairment Major Cause:	Other
Size of Household:	0	Contact Method:	Large Print
Referred by:	Goofy's Dog Grooming	Income Level:	\$10,001 - \$20,000
Primary Staff:	Terri Oberkamper	Income Source(s):	SSDI

Consumer: Templates

4.8.6 Print Eligibility

—Click “Print Eligibility” to generate a pdf file with a record containing the consumer’s disability situation and services they have requested.

Print Eligibility | Print Intake | Print Record | Print Mailing Label | Complaints (0) | Reset Last Contact Date | Select Last Contact Date | Merge Record

Consumer: Print Eligibility

Consumer Eligibility Form

To be eligible for Awesome CIL services, a person must experience a significant disability which limits their ability to function independently. In order to document that you are eligible for our services, please answer the following questions,

I, Dora Duck, state that I have the following disability(ies):

Primary Disability: _____

Secondary Disability(ies): _____

Additional Comments: _____

My disability(ies) substantially limits me from functioning independently in the following area(s):

self-care
 mobility
 education
 employment
 housing
 Other (specify): _____

The services I am requesting will help me: (Check all that apply)

improve my ability to function in my family or community
 maintain my ability to function in my family or community
 obtain, maintain or advance in employment

I understand that it is my choice to have services provided to me under an Independent Living Plan (a formal plan which states my goals and services I will receive) or I can choose not to have (Waiver) such a plan. I choose:

Independent Living Plan Waiver

Consumer's Signature: _____ Date: _____

By signing below, I determine as a representative of the service provider that the applicant is eligible for services and has met the basic requirements specified in Section 364.40 .

II. Specialist Signature: _____ Date: _____

PPR/704 Record: Yes
 Visual Impairment Severity: Legally Blind (excluding totally blind)
 Visual Impairment Major Cause: Other
 Contact Method: Large Print
 Income Level: \$10,001 - \$20,000
 Income Source(s): SSDI Employment
 Registered Voter: Yes
 Primary Disability:
 Relocated/Continued:
 At Risk for Institutionalization: No

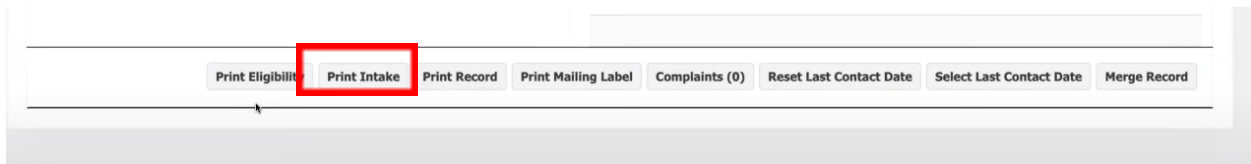
Print Mailing Label | Complaints (0) | Reset Last Contact Date | Select Last Contact Date | Merge Record

Open/Close

Print Eligibility: PDF

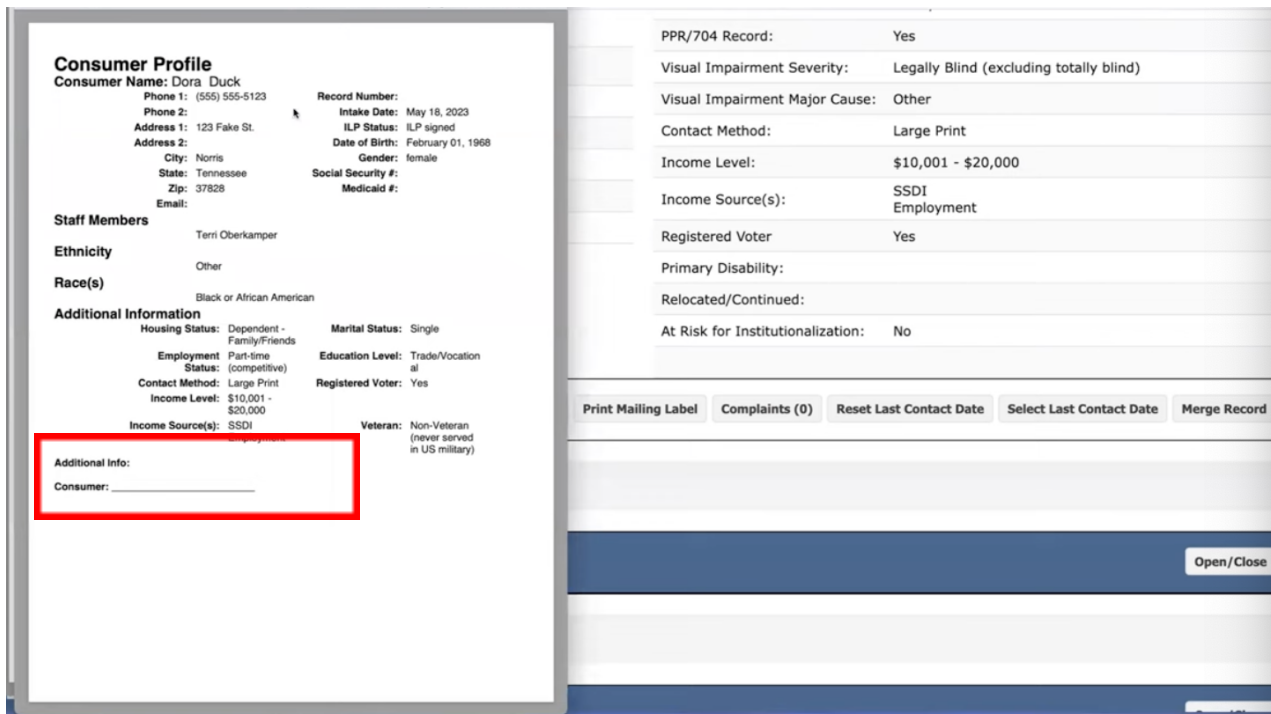
4.8.7 Print Intake

—Click “Print Intake” to generate a pdf that contains the consumer’s contact and demographic information.



Consumer: Print Intake

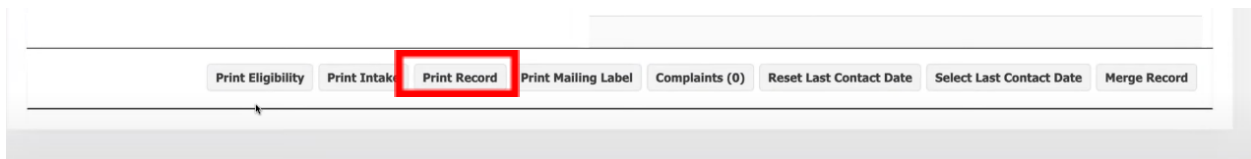
The generated PDF can be seen here. Note there is a signature line for the consumer to verify that the information is accurate.



Print Intake: PDF

4.8.8 Print Record

—Click “Print Record” to see notes from the consumer record.



Consumer: Print Record

The page will then give you multiple checkboxes indicating the notes from the record that you would like to print.

Consumer Tabs To Print ■ Include all Tabs

Title: *Optional*

Consumer Demographics Include Mailing Address

Other Information *Marital Status, Housing Status, Employment Status, etc.*

Other Information is only available if Consumer Demographics is selected

System Numbers

Additional Information

Primary Staff

All Allowed Staff

Overview Notes

Contact Notes

Disabilities

Goals

Services Exclude Time Tracking entries on Services

Print Record: Section Options

You can also decide the format you would like the notes in. The default format is PDF, but you can switch to other formats as well.

For PDF only

Add Staff Signature Lines : 0 1 2 3 4

Note Order: Ascending Descending

Adjust font size by:

Output Format: PDF Word

The Word format is not as easy to follow visually but should be easier to use with screen readers, which is its intended purpose

Only include notes by the following staff ■ Include all Staff

Only notes entered for this consumer by staff that are checked here will show on the printed form.

Print Record: Format Choices

You can also filter by:

- Choosing the staff member who entered them.
- Choosing a date range of when the notes were entered.

Only include notes by the following staff Includ all Staff Open/Close

Only notes entered for this consumer by staff that are checked here will show on the printed form.

Terri Oberkamper

Only print the following Contact Notes Select all Contact Notes Open/Close

Date Range Use Today's Date This Month Last Month This Quarter Last Quarter Last 6 Months Last Calendar Year

Start Date: 05/18/2023 Default is the start date for this Consumer End Date: 05/18/2023 Default is today

Back Print

Print Record: Notes/Date

4.8.9 Print Mailing Label

—Click “Print Mailing Label” to format their mailing address into a label.

Print Eligibility Print Intake Print Record **Print Mailing Label** Complaints (0) Reset Last Contact Date Select Last Contact Date Merge Record

Consumer: Print Mailing Label

4.8.10 Complaints

(This feature may not be installed at your center.)

—Click “Complaints” to see any complaints this consumer is involved in.

Print Eligibility Print Intake Print Record Print Mailing Label **Complaints (0)** Reset Last Contact Date Select Last Contact Date Merge Record

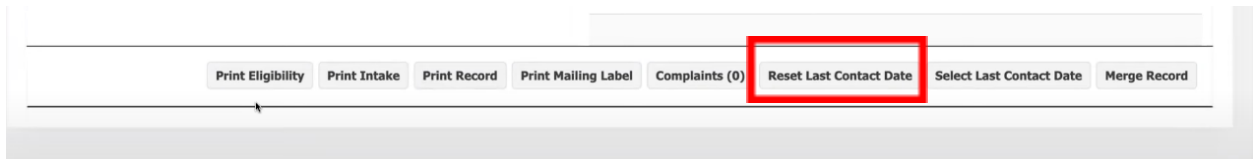
Consumer: Complaints

When the number says (0), it will take you straight to the page where you input complaints.

If there is a non-zero number in parentheses, you will find the list of complaints there.

4.8.11 Reset Last Contact Date

—Click “Reset Last Contact Date” to reset the date that this person was last contacted.

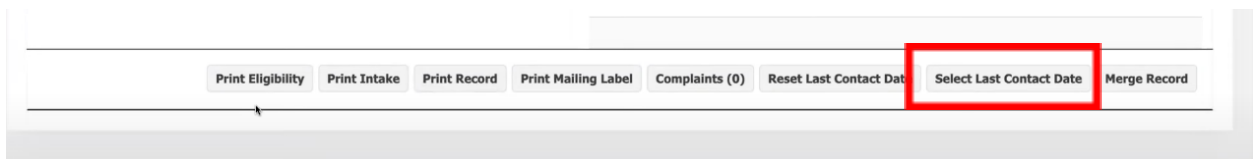


Consumer: Reset Last Contact Date

4.8.12 Select Last Contact Date

—Click “Select Last Contact Date” to manually input the last contact date.

*This will override any automatic dates that the system may input

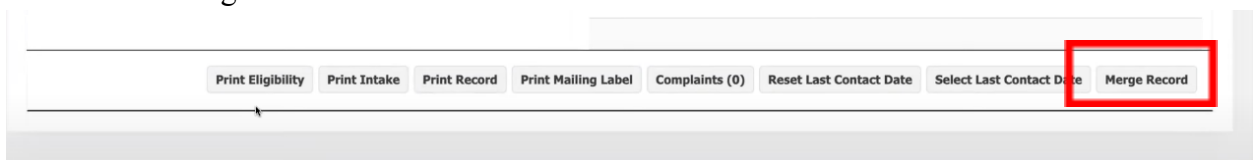


Consumer: Select Last Contact Date

4.8.13 Merge Record

—Click “Merge Record” to merge duplicate records into a single record.

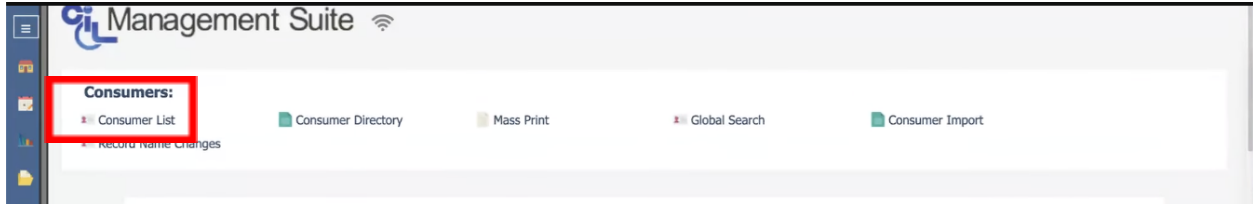
*The merged record will contain all the information and notes from both records



Consumer: Merge Record

4.9 Consumer List Page Filters

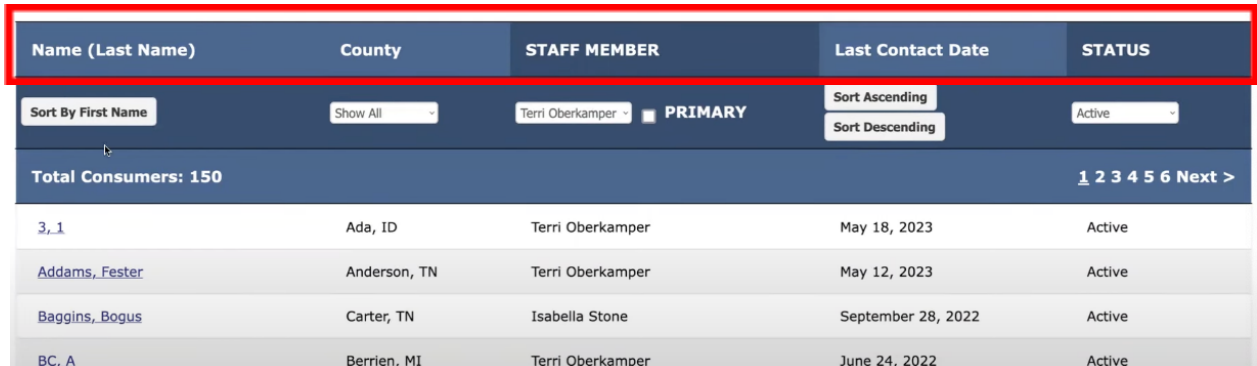
—Click “Consumer List”



Consumer List

There are several ways in which you can filter the consumer list page.

- Last Name or First Name
- County
- Staff Member
- Last Contact Date
- Status

A screenshot of the Consumer List page. The top section is a dark blue header with a red border. It contains several filter controls: 'Name (Last Name)', 'County', 'STAFF MEMBER', 'Last Contact Date', and 'STATUS'. Below the header, there are more filters: 'Sort By First Name', 'Show All', 'Terri Oberkamper', 'PRIMARY', 'Sort Ascending', 'Sort Descending', and 'Active'. A summary bar shows 'Total Consumers: 150' and a pagination control '1 2 3 4 5 6 Next >'. Below this is a table with five columns: Name, County, Staff Member, Last Contact Date, and Status. The table contains four rows of data.

Name (Last Name)	County	STAFF MEMBER	Last Contact Date	STATUS
3, 1	Ada, ID	Terri Oberkamper	May 18, 2023	Active
Addams, Fester	Anderson, TN	Terri Oberkamper	May 12, 2023	Active
Baggins, Bogus	Carter, TN	Isabella Stone	September 28, 2022	Active
BC, A	Berrien, MI	Terri Oberkamper	June 24, 2022	Active

Consumer List Filters