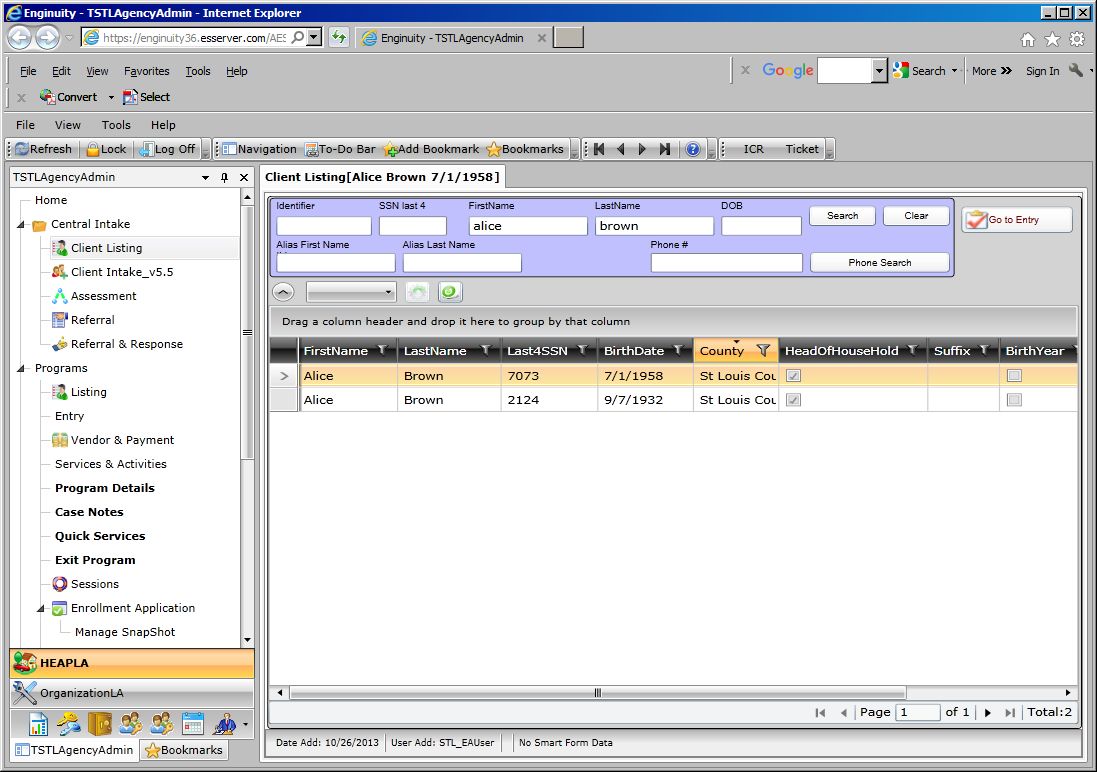
**The process to search for clients and enter and/or update the client demographic information has not changed. It is included in this for documentation purposes. This process has not change – continue to follow your agency’s approved procedures.**

1. Search the MIS system, using the **Client Listing Page** before entering the information. You can search by SSN, First Name, Last Name or DOB.



1. If the client is found, highlight the client name and click on the **Client Intake v5.5** to update information such as – family members, income, education levels (if known), insurance (if known). Click the SAVE button when finished.



1. If the client is **not** found, click on the New Household. Consent level is region Client Intake v5.5 page, which means the entire Missouri CAA network can view the client data. The following information is required on the Contact Tab:

SSN Street Name

SSN Code City

First Name County

Last Name State (always MO)

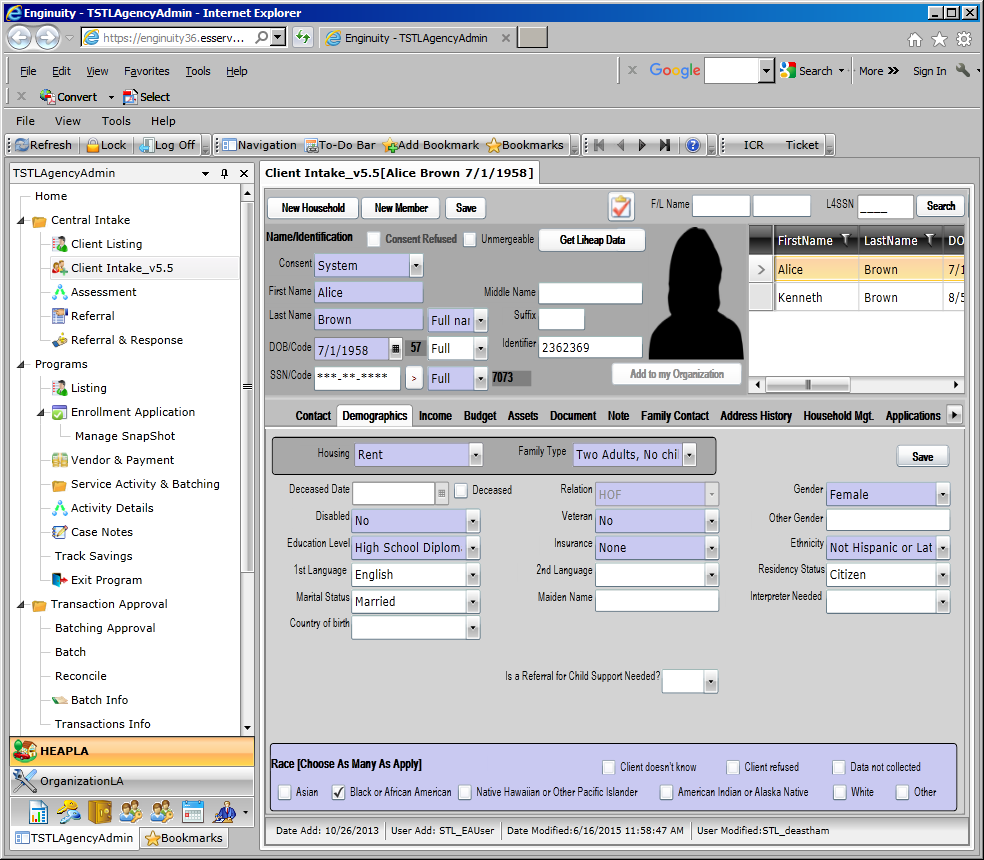
Date of Birth Zip

Street # Zip Data Quality

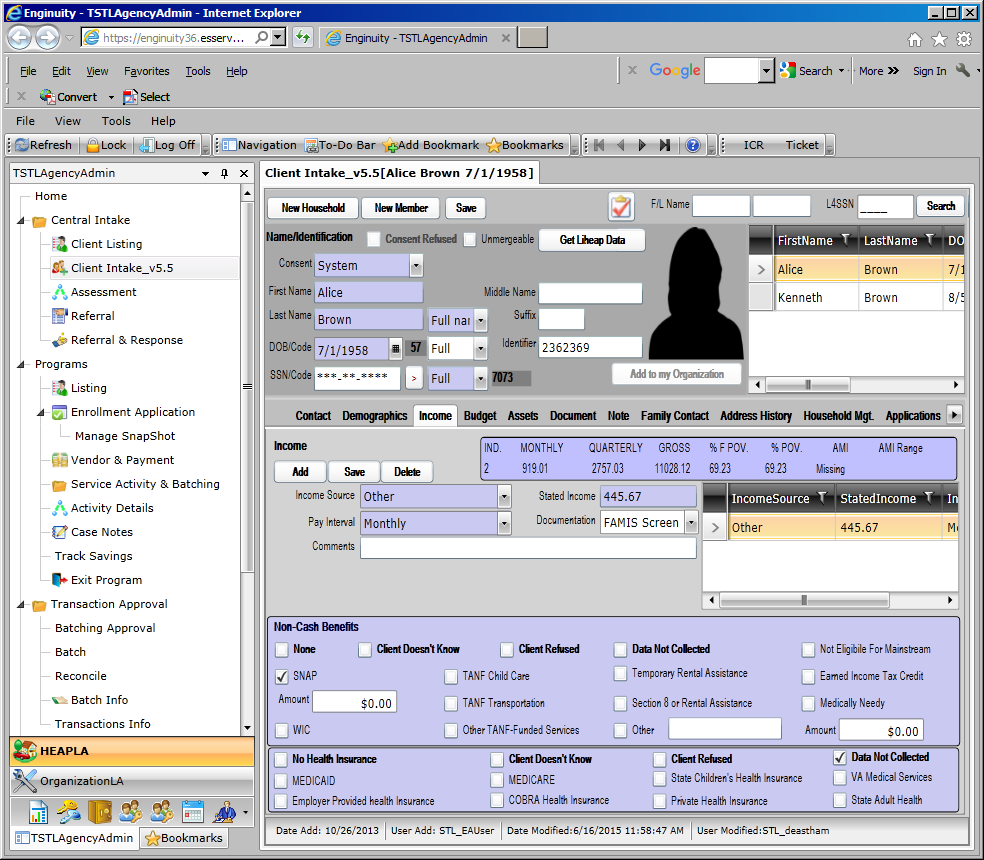
* If there is an apartment address, that information can also be entered
* Phone number can be entered
* Be sure to click the SAVE button when finished.

**CSBG required fields are highlighted in the blue boxes. Enter information for each family member in the household.**

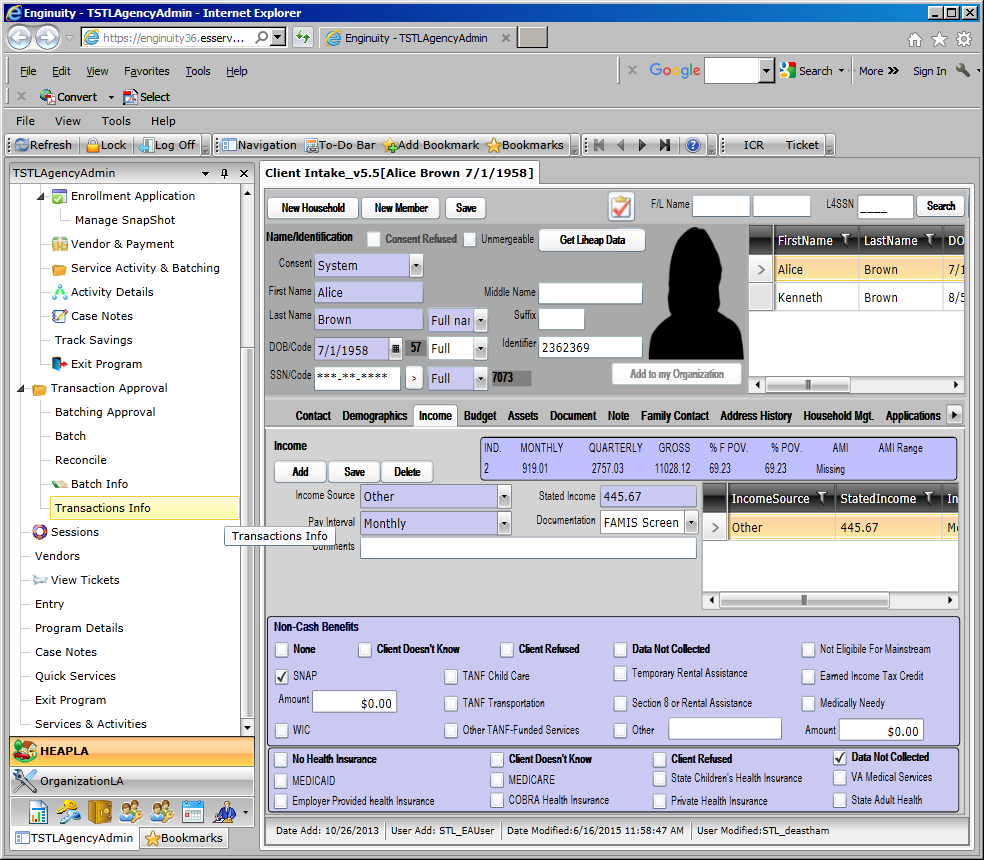
1. After entering the Contact information, click on Demographics Tab to enter household member information.



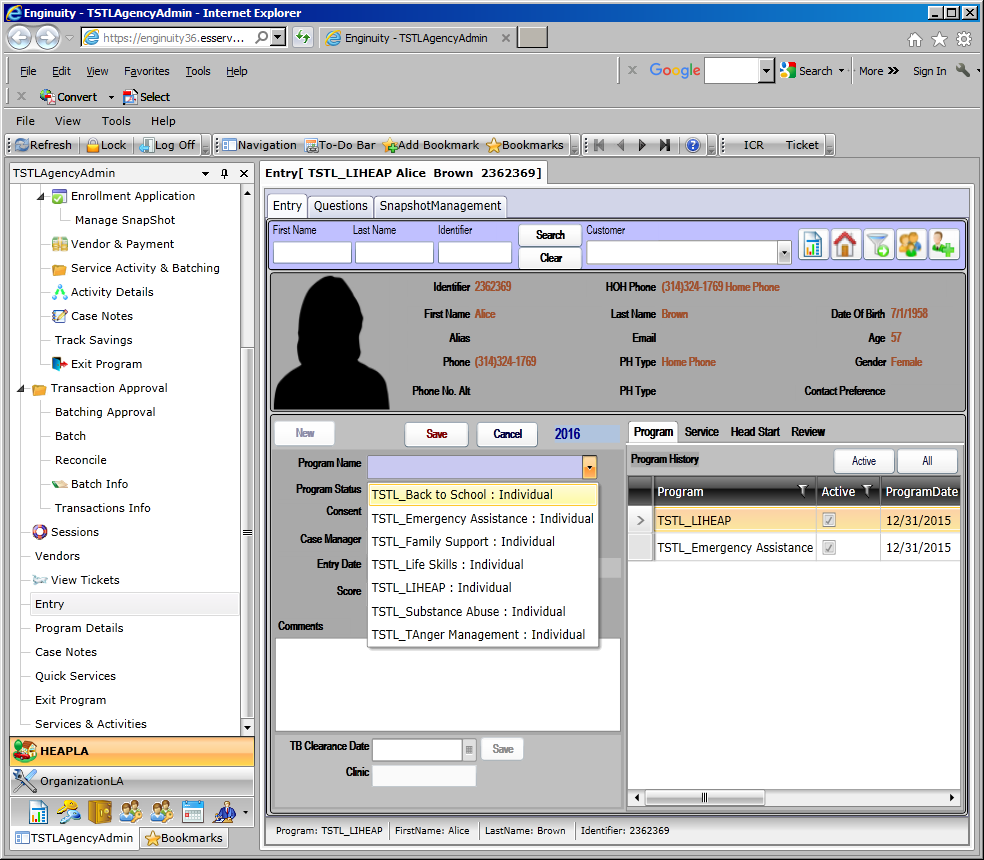
1. Enter information for each family member in the household. Click the SAVE button when finished.
2. Click on the Income tab to add income.



1. Once the Client Intake information has been entered you are ready to enroll in the Emergency Assistance program. On the Client Intake Page there is a button which will take you to program entry (right above the person’s head). OR click on the **Entry** in the programs listing.



**THIS IS THE NEW PROCESS**



Click the new button to view the list of programs for enrollment - select the Emergency Assistance program

Program status is enrolled

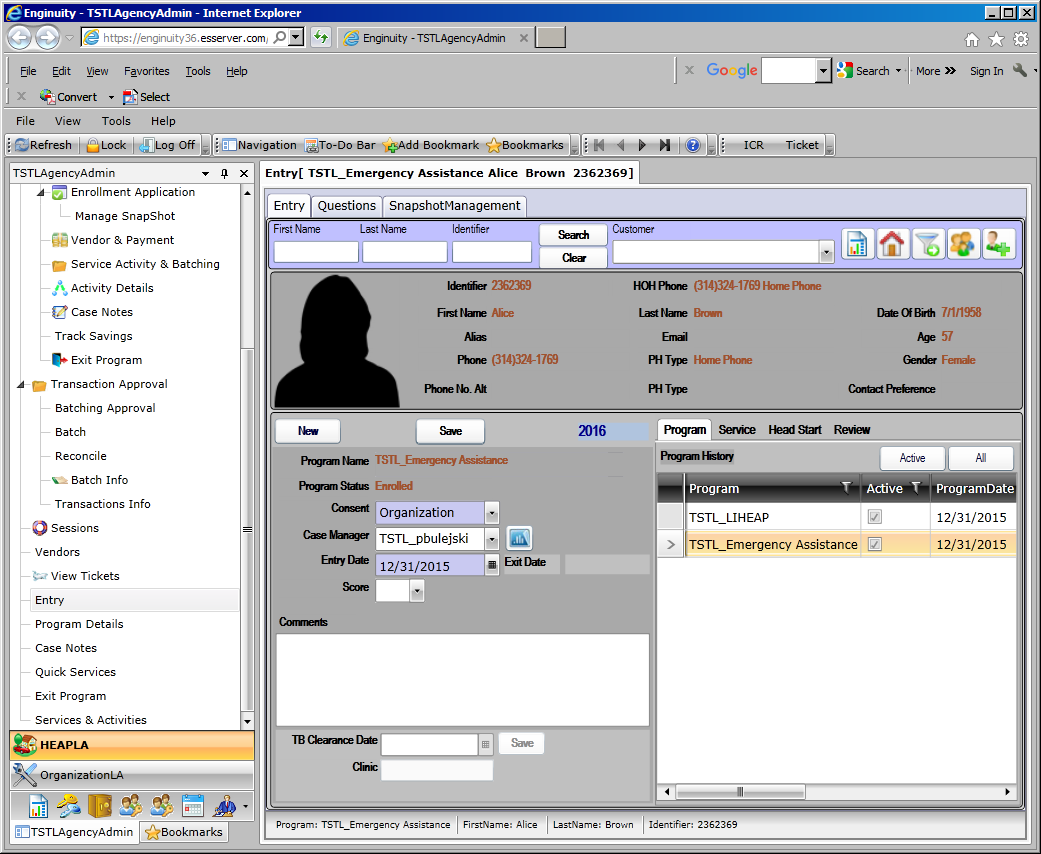
Consent level is ORGANIZATION

Case Manager will be entered once you hit the save button

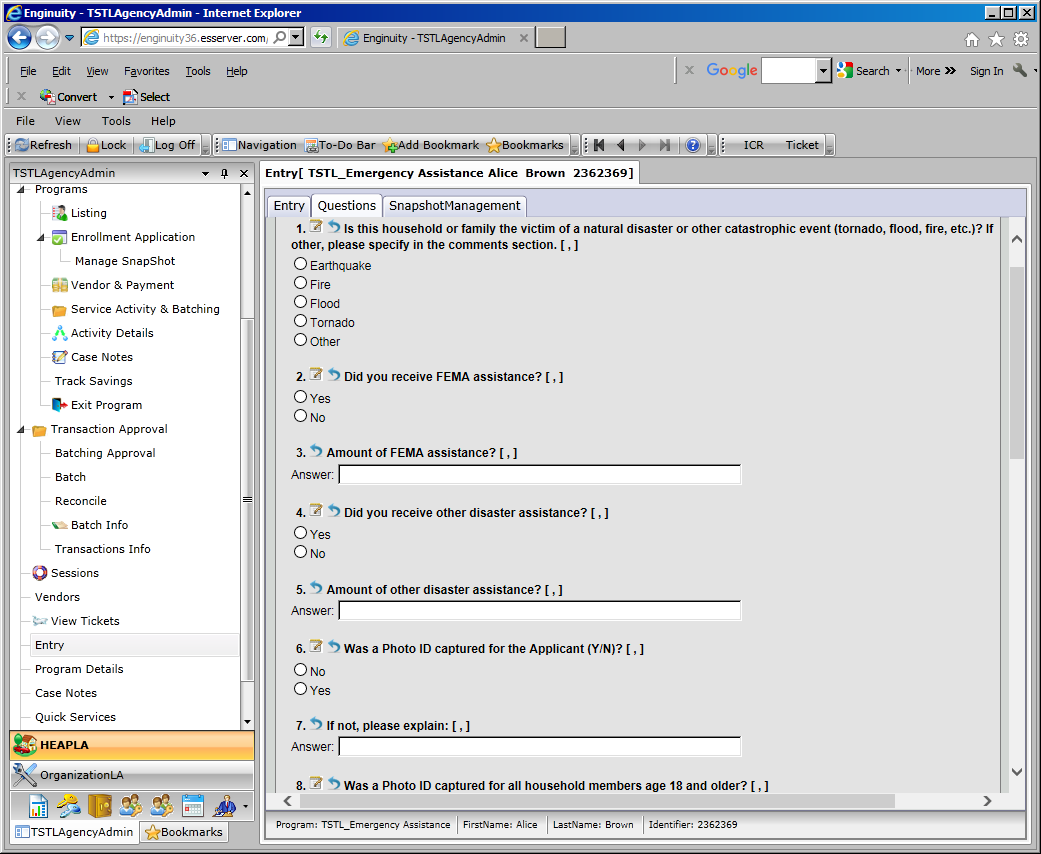
Enter the ‘entry date’

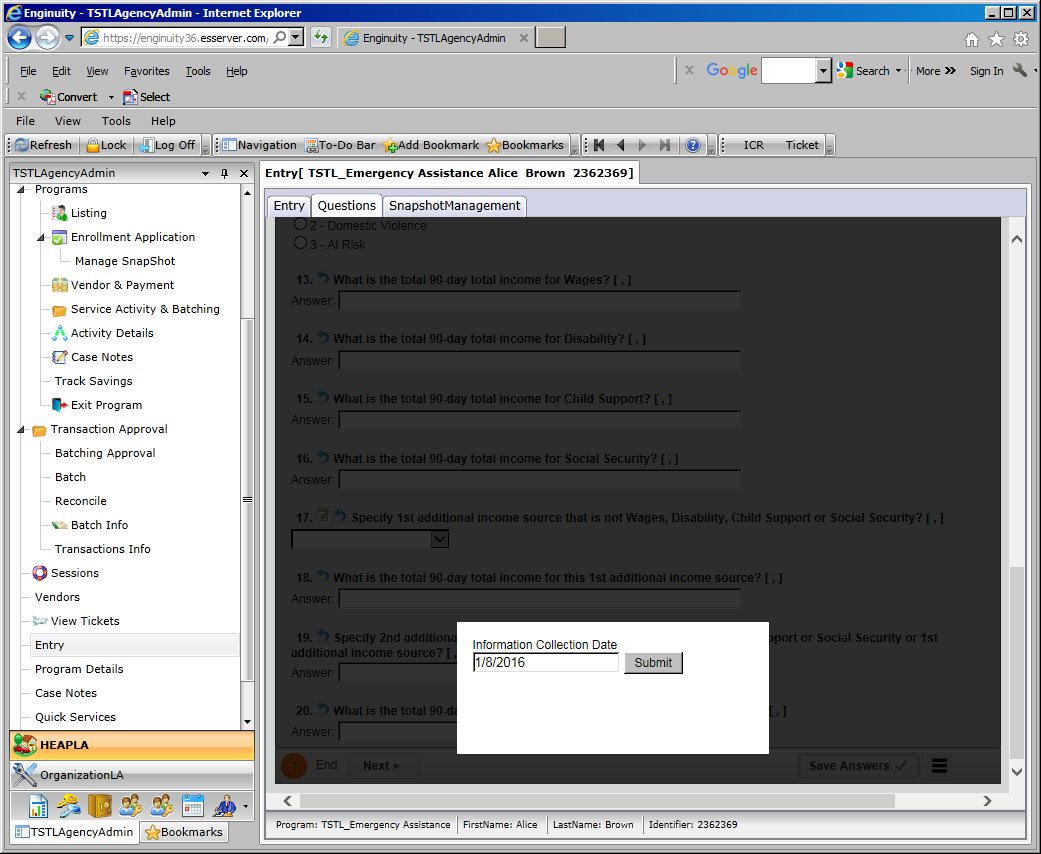
Click SAVE.

Client is now enrolled in Emergency Assistance.

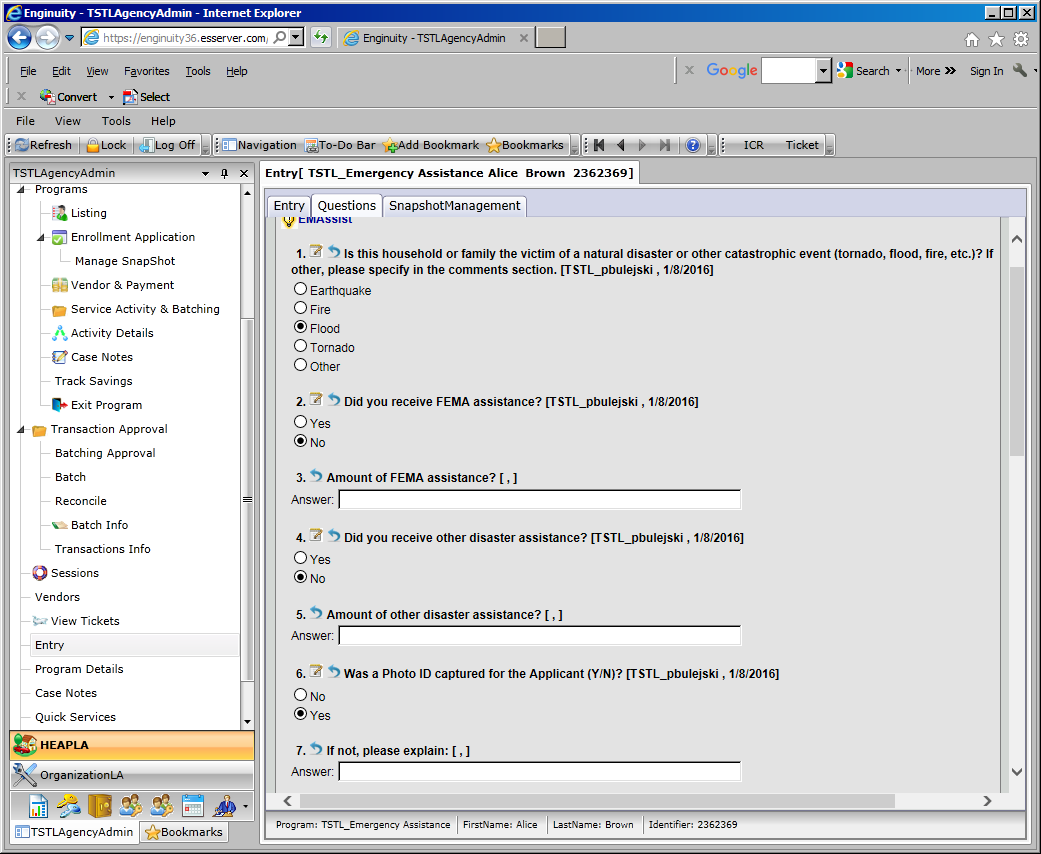


Click on the question tab to answer the questions. Answer the questions – then scroll down to the end, click save answers



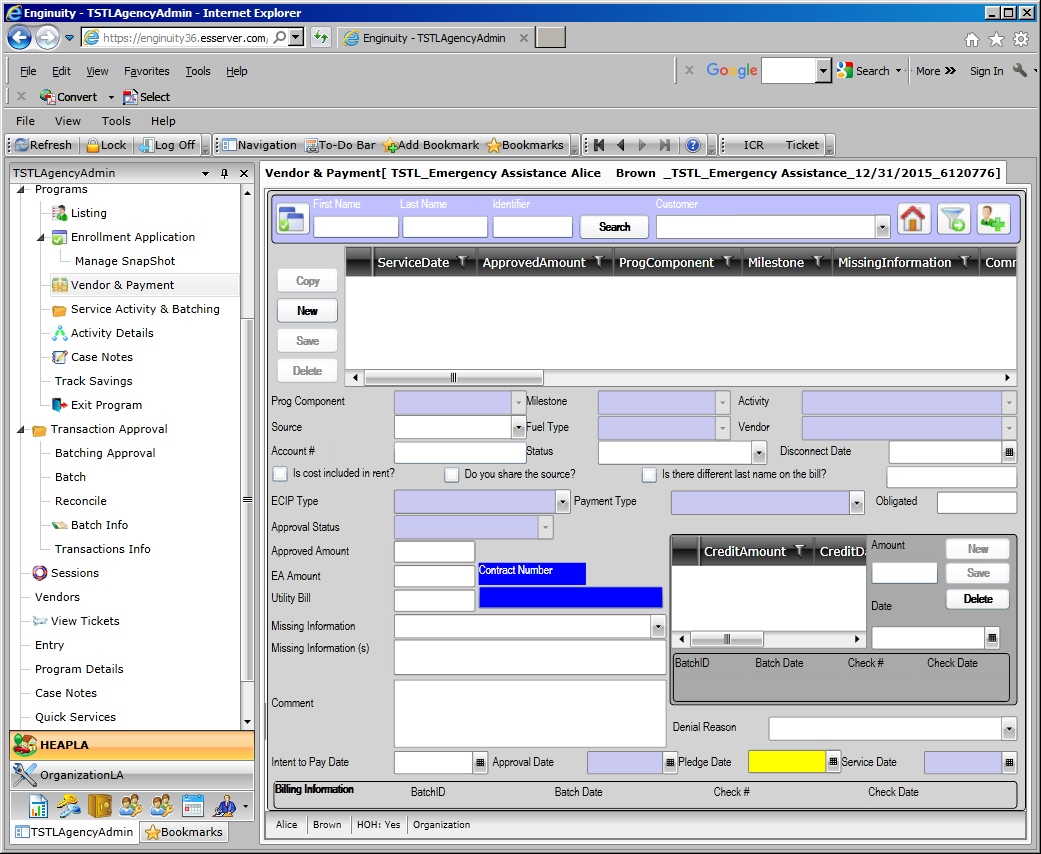


Click the submit button. If you want to view the summary of your answers, click the next button



From this point, you can proceed to the Vendor & Payment page.

**This process has not change – continue to follow your agency’s approved procedures.**



The data on this page is extremely critical for payments to the vendor and reports for fiscal and state.

Click on NEW button.

Several of the data fields are dependent on information entered in order to populate other fields. Many of the fields contain a drop down list and based on the contract, the entries vary.

The following fields outlined are major fields and control other data for fields based on entry.

|  |  |
| --- | --- |
| Program Components: | Dollar Help, Dollar More, Water, etc. (controls the milestone/activity available for selection) |
| Fuel Type: | Electricity, Natural Gas, Propane, Water, Wood etc. (controls what vendors are associated with the fuel type) |
| Vendor: | Select appropriate vendor for the fuel type |
| ECIP Type: | Dollar Help, Dollar More, etc. |
| Payment Type: | Select appropriate payment type |
| Obligated Amount: | $ amount pledged/obligated |
| Approved Amount: | $ amount approved for payment |
| Approval Status: | Select appropriate approval status for the transaction type |
| Approval Date: | Date utility contacted and pledge made |
| Service Date: | Date from the application |

* For the other fields, the information required has not changed.

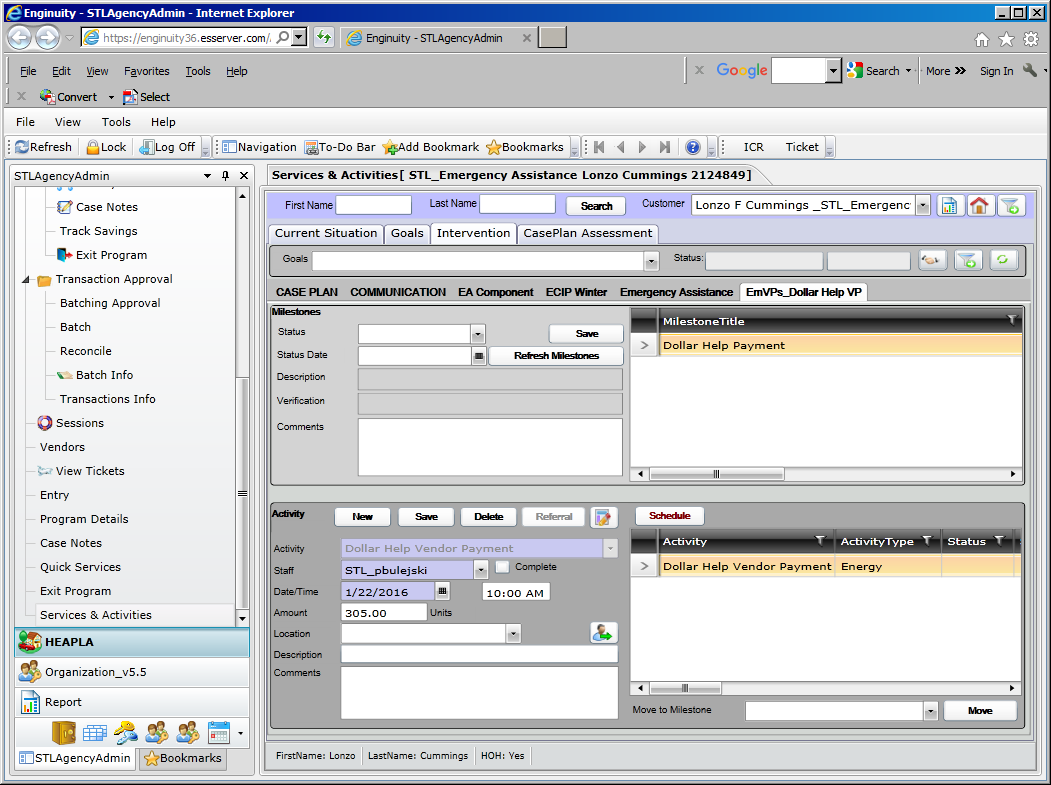
|  |  |
| --- | --- |
| Source: | Primary or Secondary |
| Account #: | Client utility account number |
| Status: | Service Terminated, Service Threatened |
| Disconnect Date: | Date from utility bill/disconnect notice |

* Once all the information is entered for that payment, click on SAVE button.
* If the blue contract box does not contain contract information, bring the transaction to your agency admin to correct.

Transactions entered are ready to be batched, processed and reconciled/paid in MIS.

**This process has not change – continue to follow your agency’s approved procedures.**

After the transaction has been entered on the Vendor Page, the service will be recorded on the Services & Activities Page. Click on the Intervention tab to locate the service.



Once the transaction has been reconciled/paid in MIS, the system will update the milestone record for that transaction. It is located on the Services & Activities page, Intervention tab - Dollar More/Dollar Help/etc.

