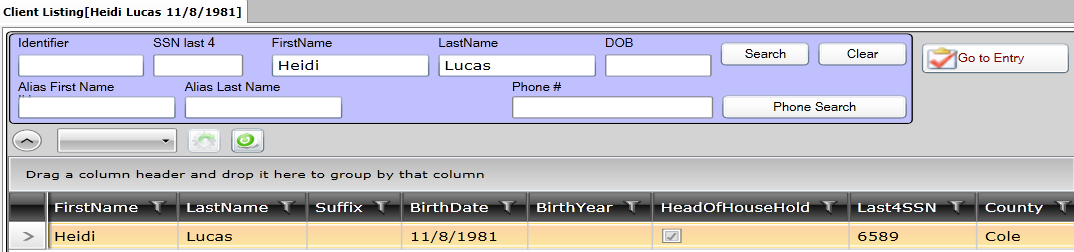
**The process to search for clients and enter and/or update the client demographic information has not changed. It is included in this for documentation purposes. This process has not change – continue to follow your agency’s approved procedures.**

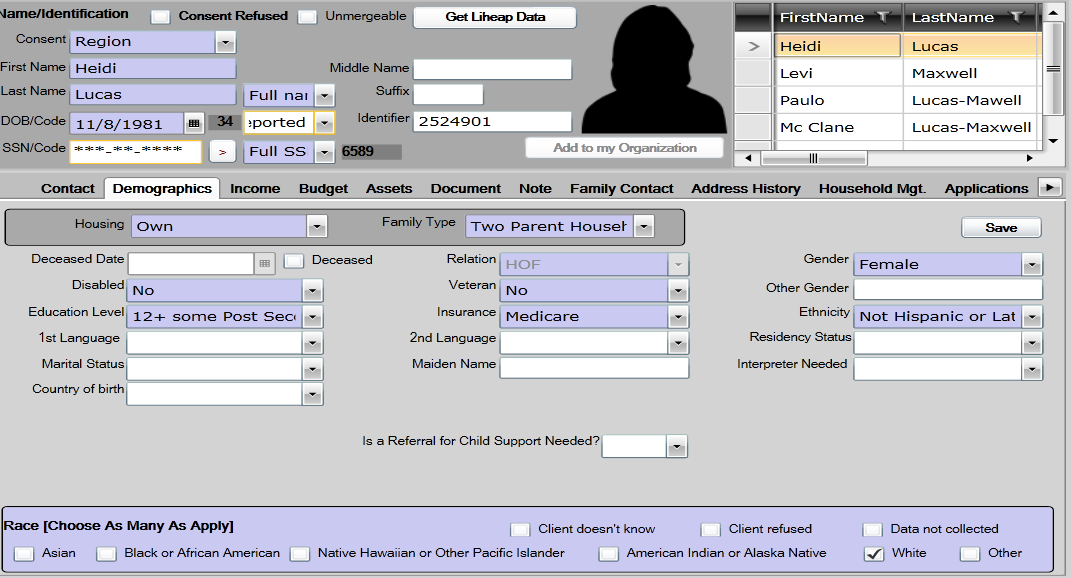
1. Search the MIS system, using the Client Listing Page before entering the information. You can search by SSN, First Name, Last Name or DOB.





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

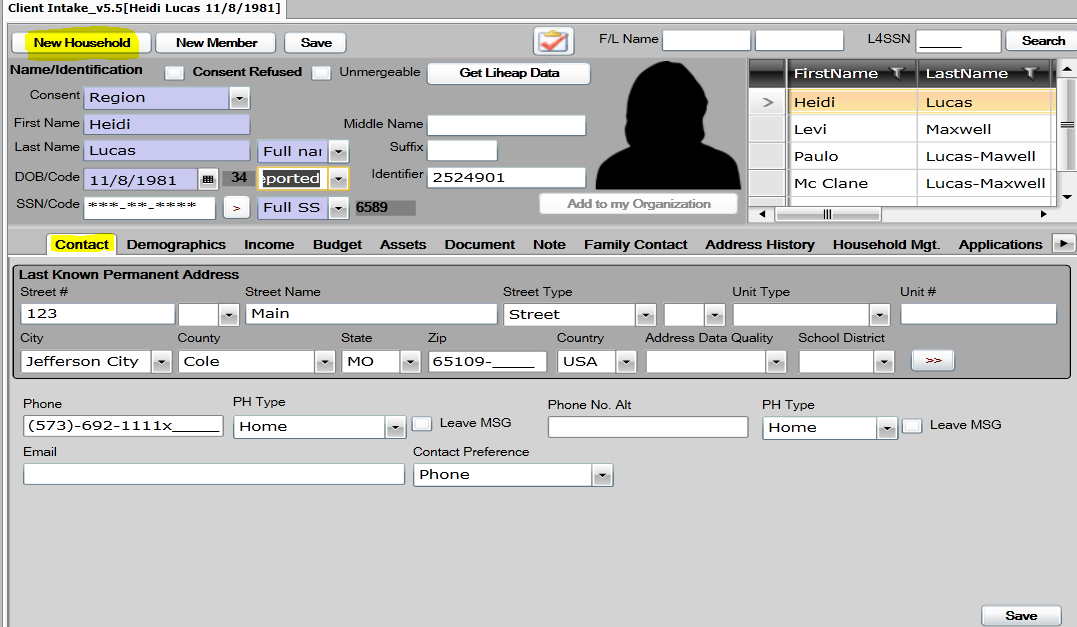
First Name County (always St Louis County)

Last Name State (always MO)

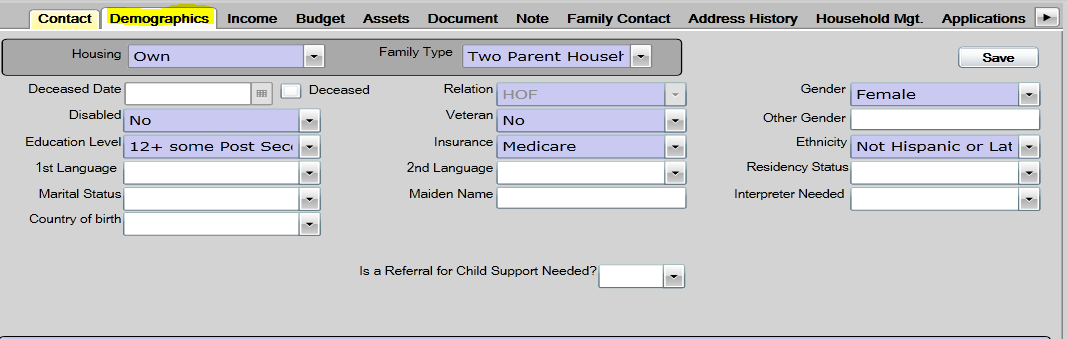
Date of Birth Zip

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.



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



1. The following information is required on the Demographics Tab for each family member that is entered on this page:

First Name Relation (HOH is always listed as HOF-head of family)

Last Name Disabled (if known)

Date of Birth Ethnicity (if known)

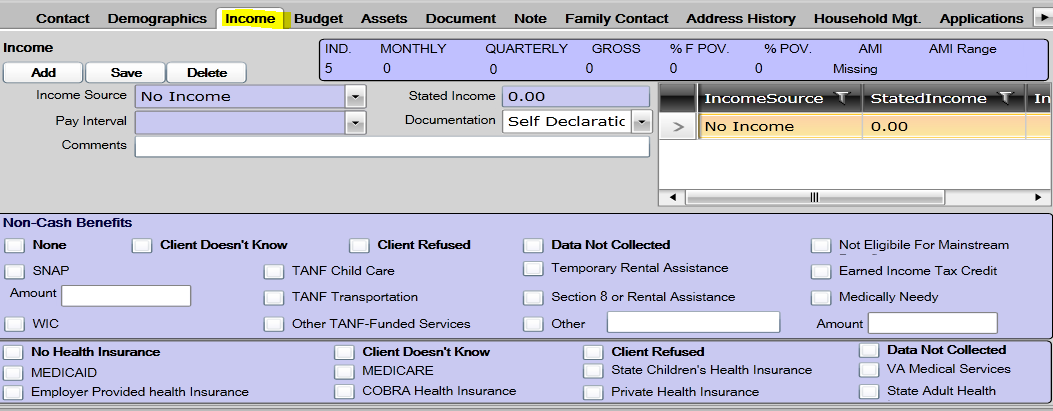
Gender Education level (if known)

Race Insurance (if known)

Housing Family Type

* Click the SAVE button when finished.

1. Click on the Income tab to add income.



1. Once the Client Intake information has been entered you are ready to enroll in the Tax 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 Family Support

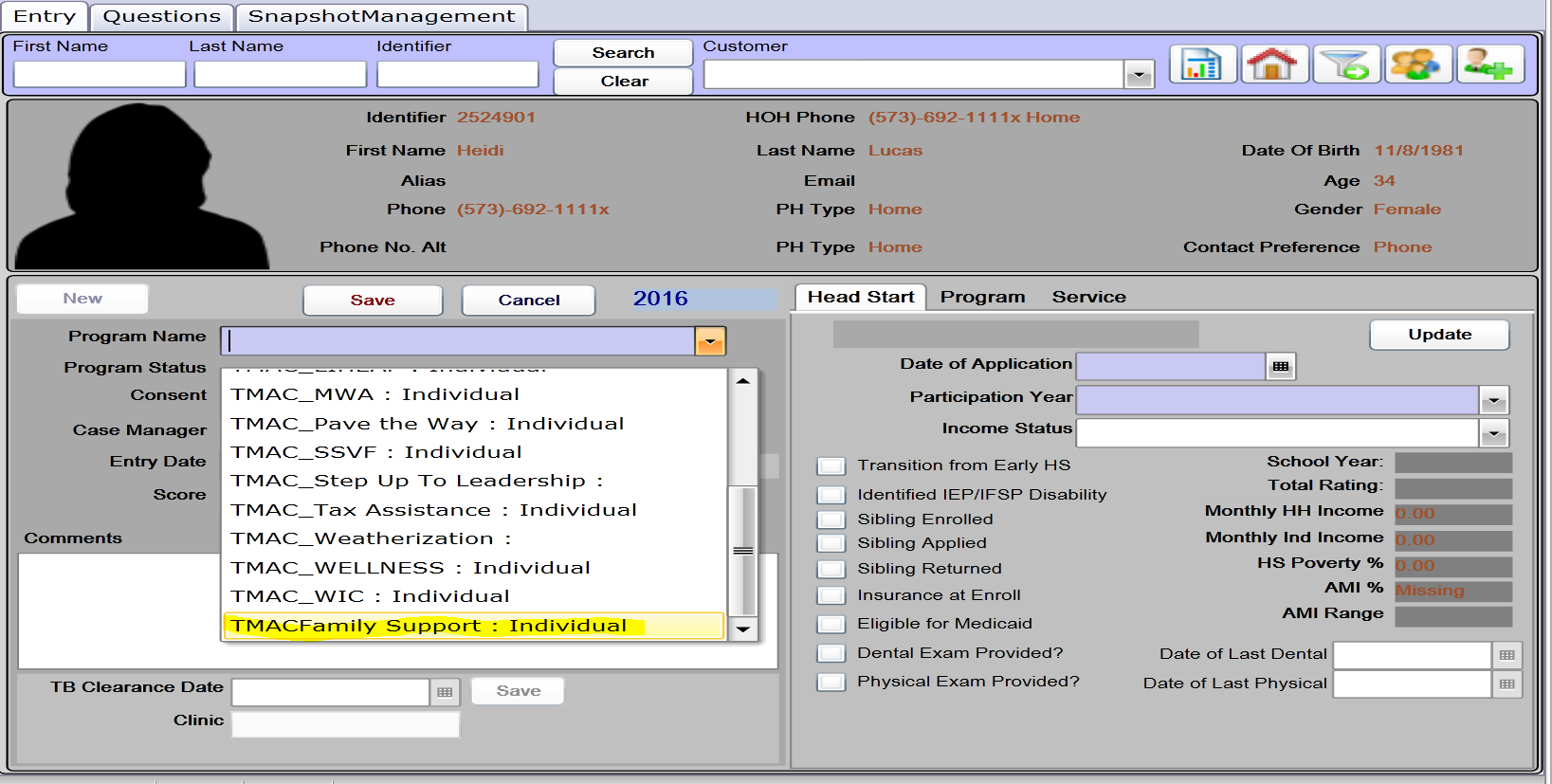
Program status is enrolled

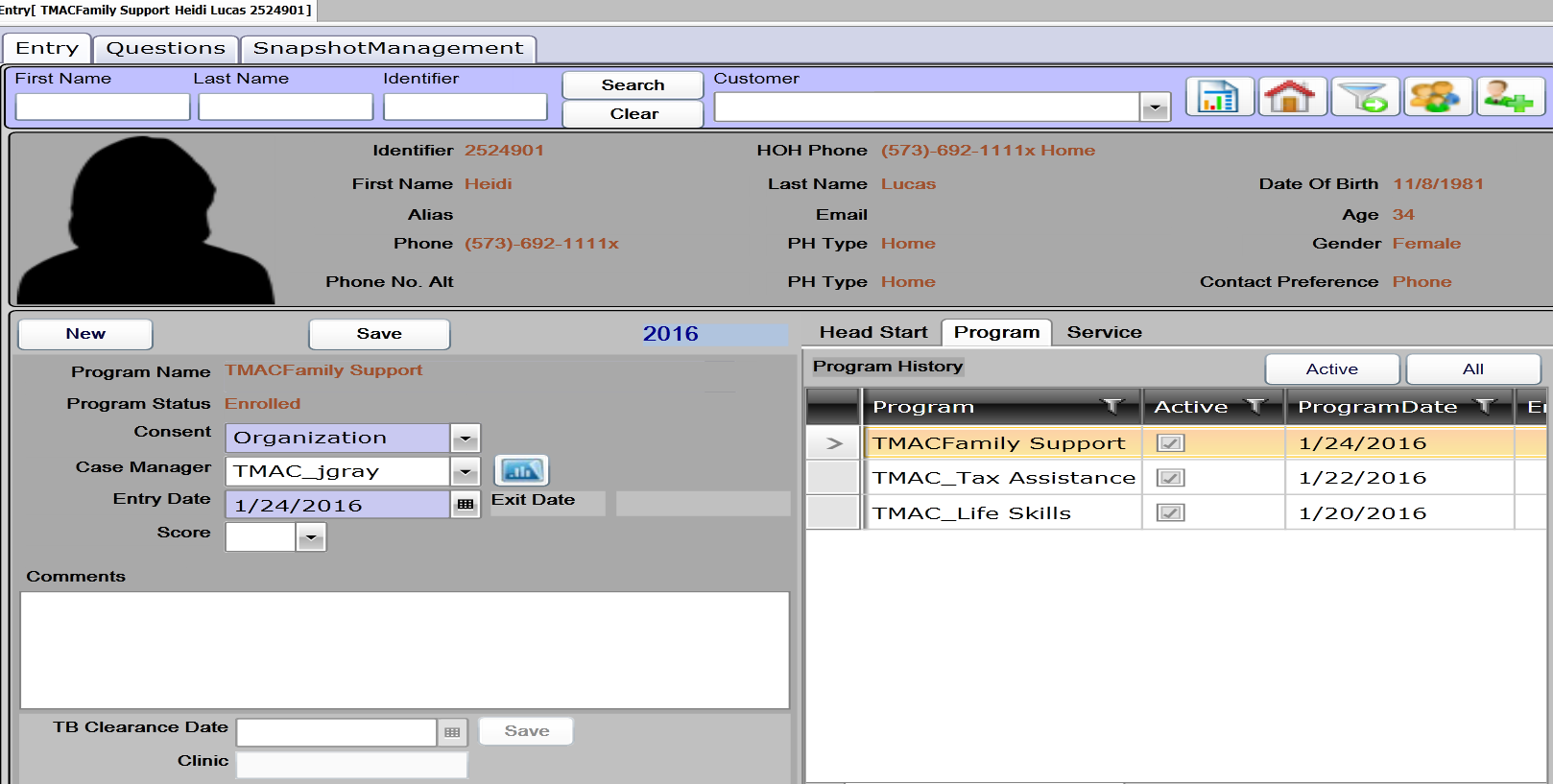
Consent level is ORGANIZATION

Case Manager will be entered once you hit the save button

Enter the ‘entry date’

Click SAVE.





To add the FSS scale go to the Program Details Page.

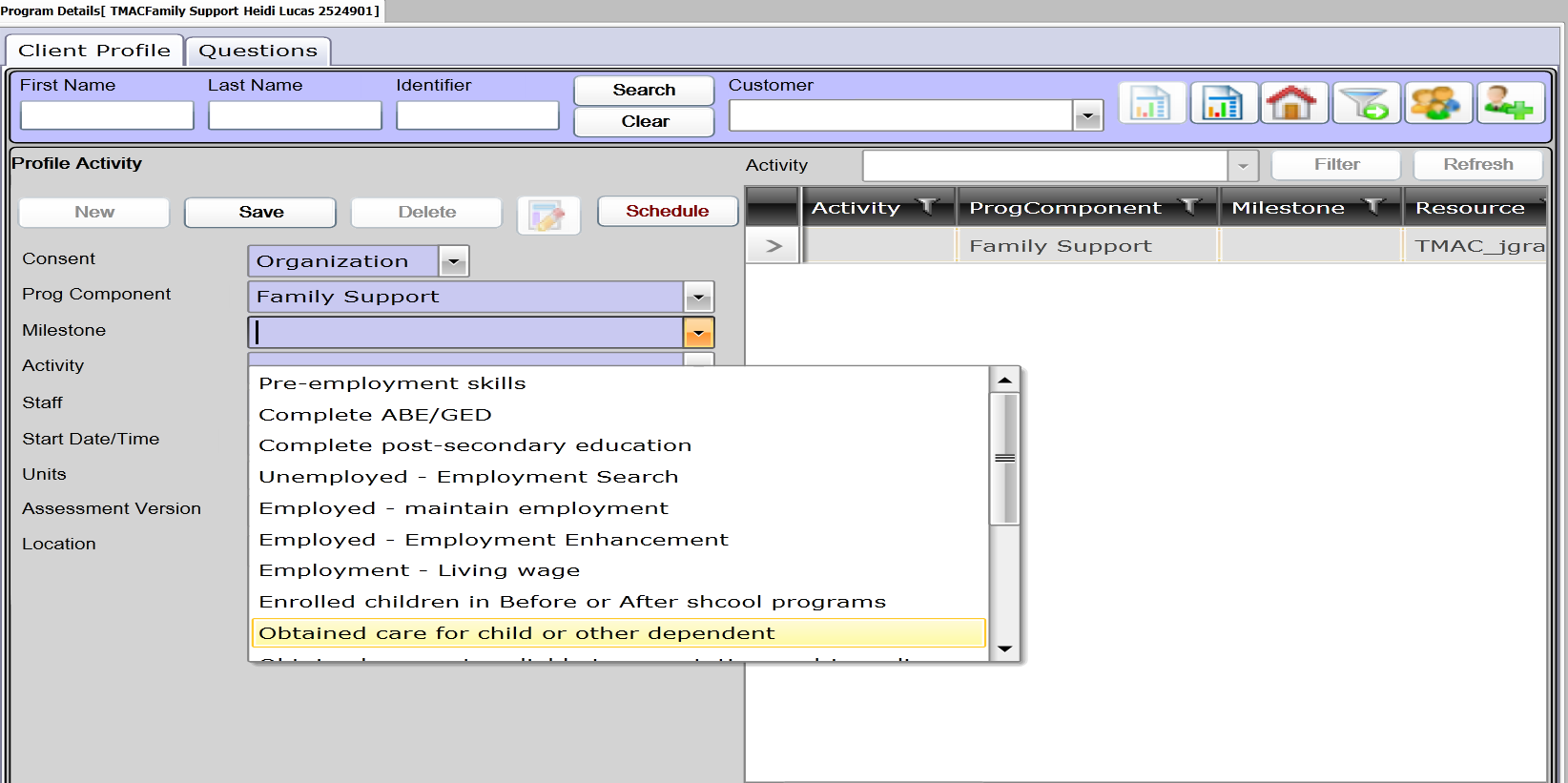




Consent-Populate Organization

Program Component-Family Support

Milestone-What is the milestone you are working on with your client. (you can pick multiple milestones on the Service & Activity Page.

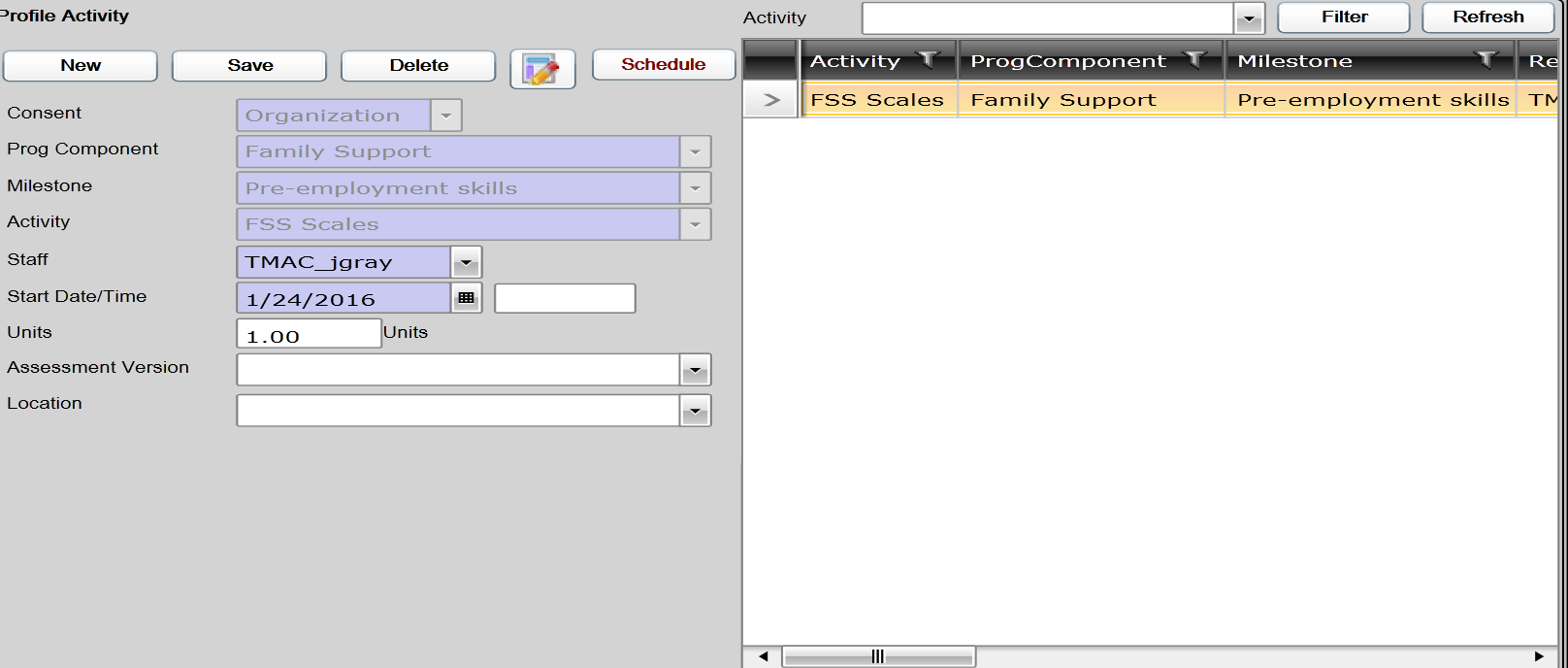


Acitivty FSS Scale

Staff defaults to user that is logged in

Date-date FSS completed

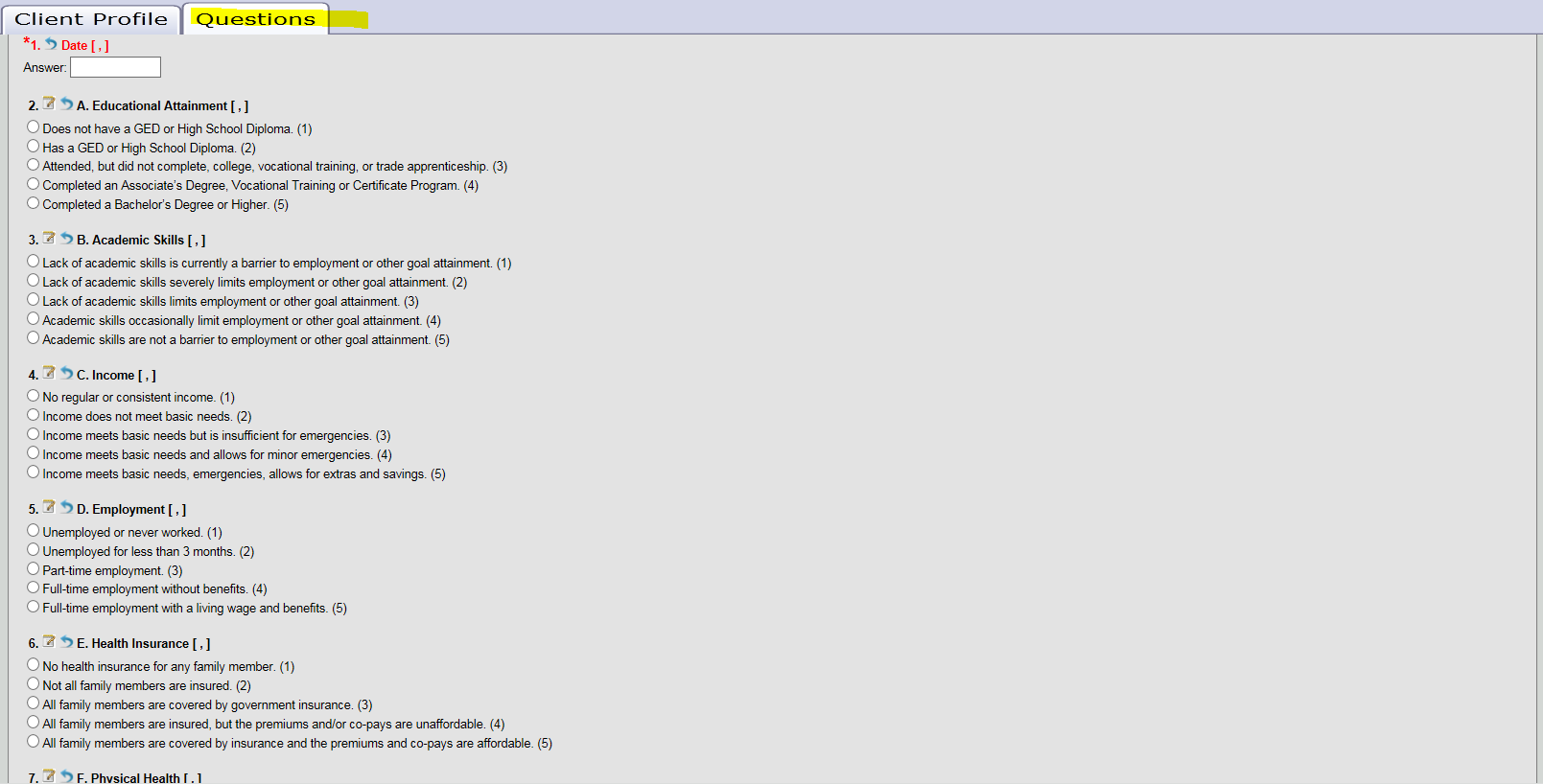
Click Save



Click on Question tab

Answer ALL Questions (use scroll bar)

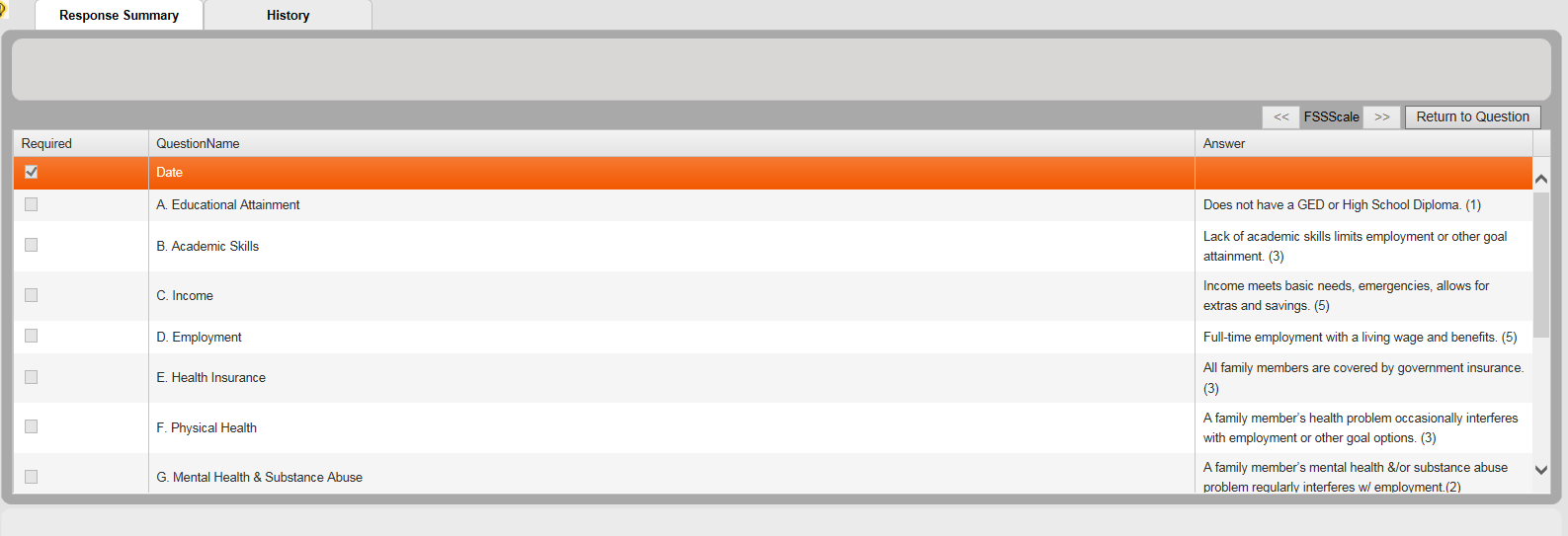
After you have answered all questions click



After you have answered all questions click Next.



This will bring you to the Response Summary tab. Review questions



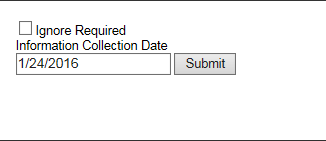
If you have answered a question incorrect you can click return to questions. You can scroll to the answer you would like to change then click next.



After you a verified questions are all answered you then will save answers.



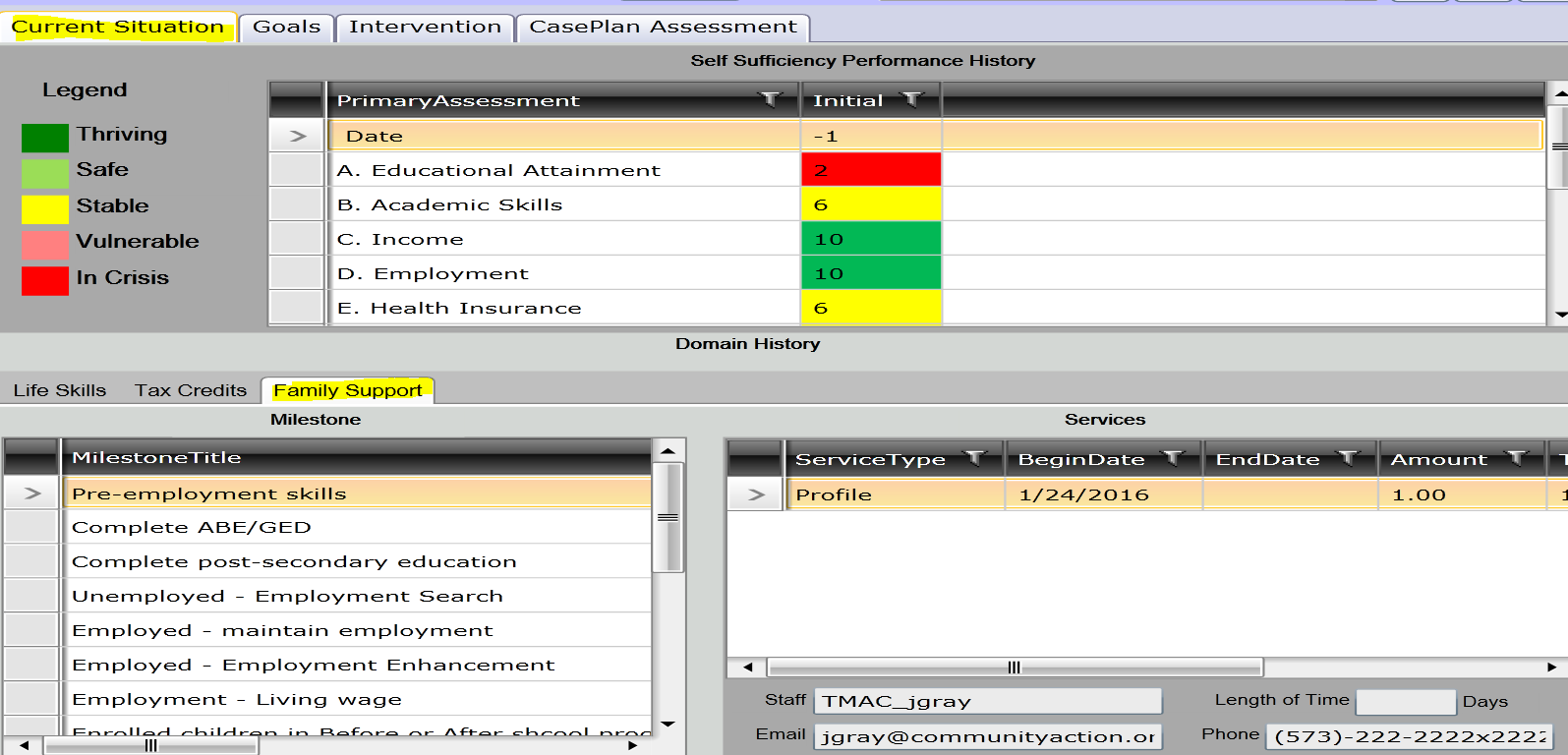
Information collection date box pop will appear. Change date if different than today’s date. Click submit. If date does need to be changed click submit.









Choose Family Support tab. Current Situation tab will show the answers scaling from the FSS scale you have completed on the Program Details page. 

Colors/Scaling

= 5 on the FSS scale (shows 10 on current situation tab)

=4 on FSS scale (shows 8 on the current situation tab)

=3 on FSS scale (shows 6 on the current situation tab)

=2 on FSS scale (shows 4 on the current situation tab)

=1 on FSS scale (shows 2 on the current situation tab)

Goals tab

Consent-Defaults to Organization

Current Situation- What is the current situation of the client?

Goal-What goal will the client be working toward to help their current situation?

Staff-defaults to user logged in

Statues defined-

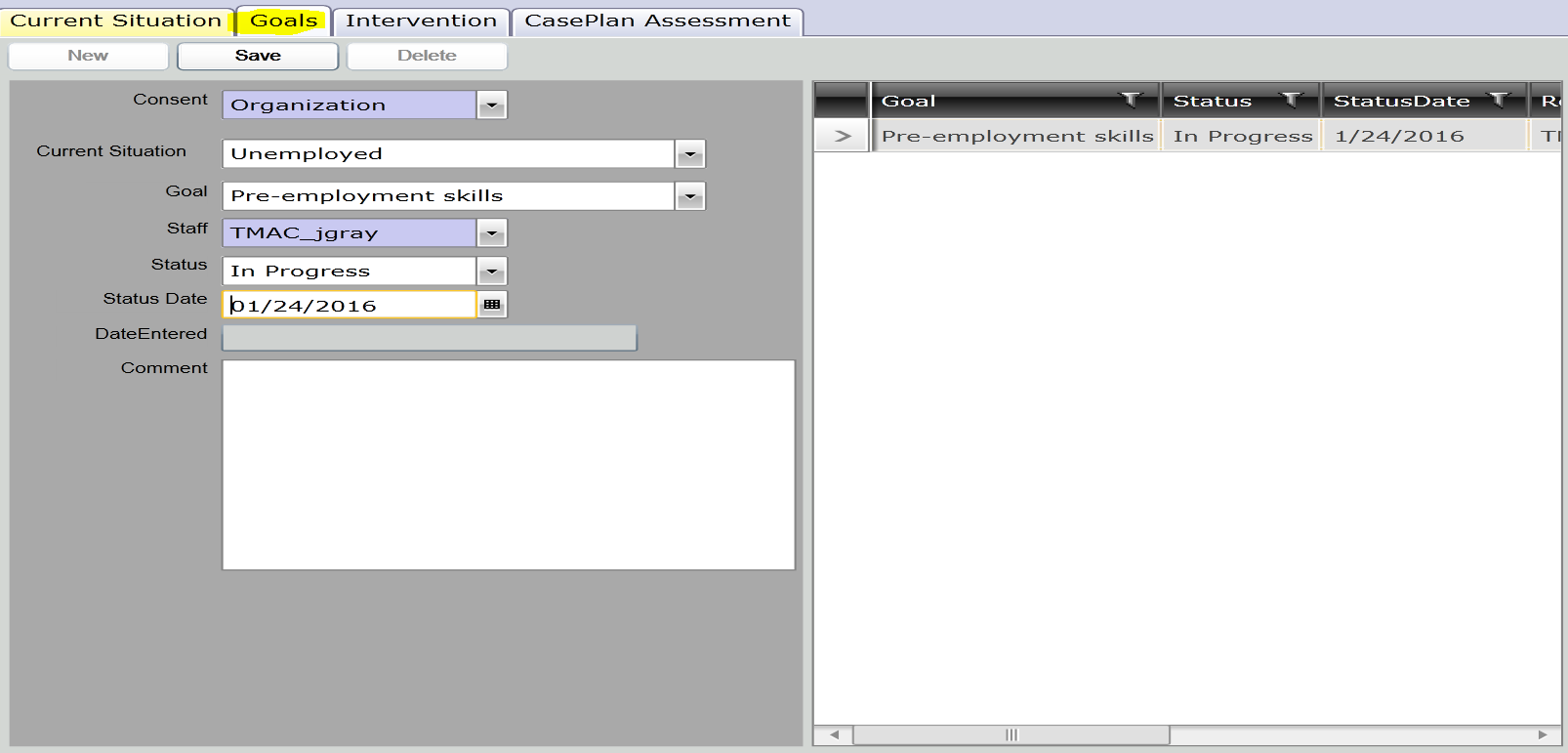
Incomplete didn’t not achieve the goal

In Progress currently working toward the goal

Complete the goals has been achieved

N/A-not applicable

Click Save



Intervention tab

Case Plan

Click New

Tasks-

What task does the client need to complete for the current goal the client is working on.

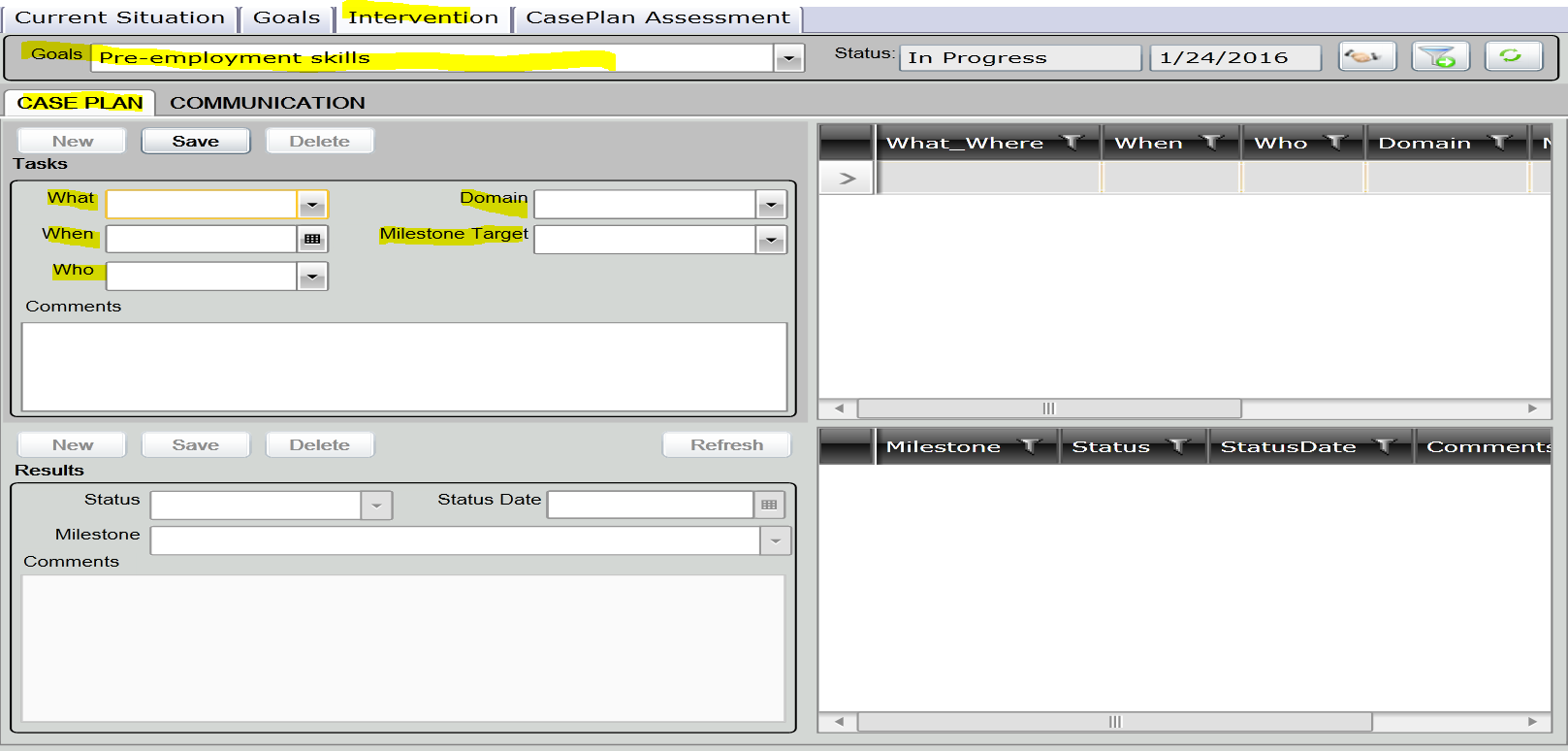
When is this task going to be completed or when does this task need to be completed by?

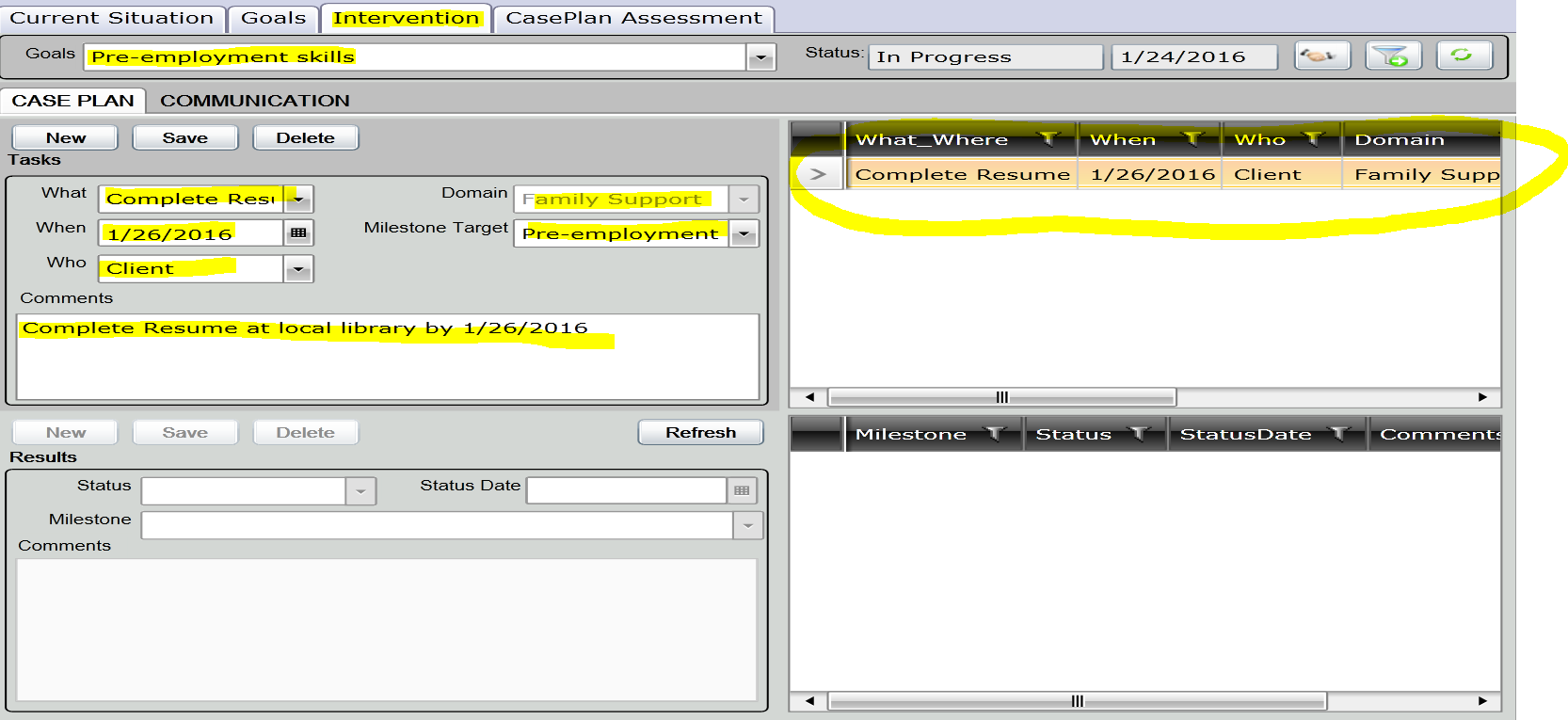
Who is responsible for this task-Client or Case Worker?

Domain-Family Support

Milestone Target-What milestone target this task being completed for?

Add comments







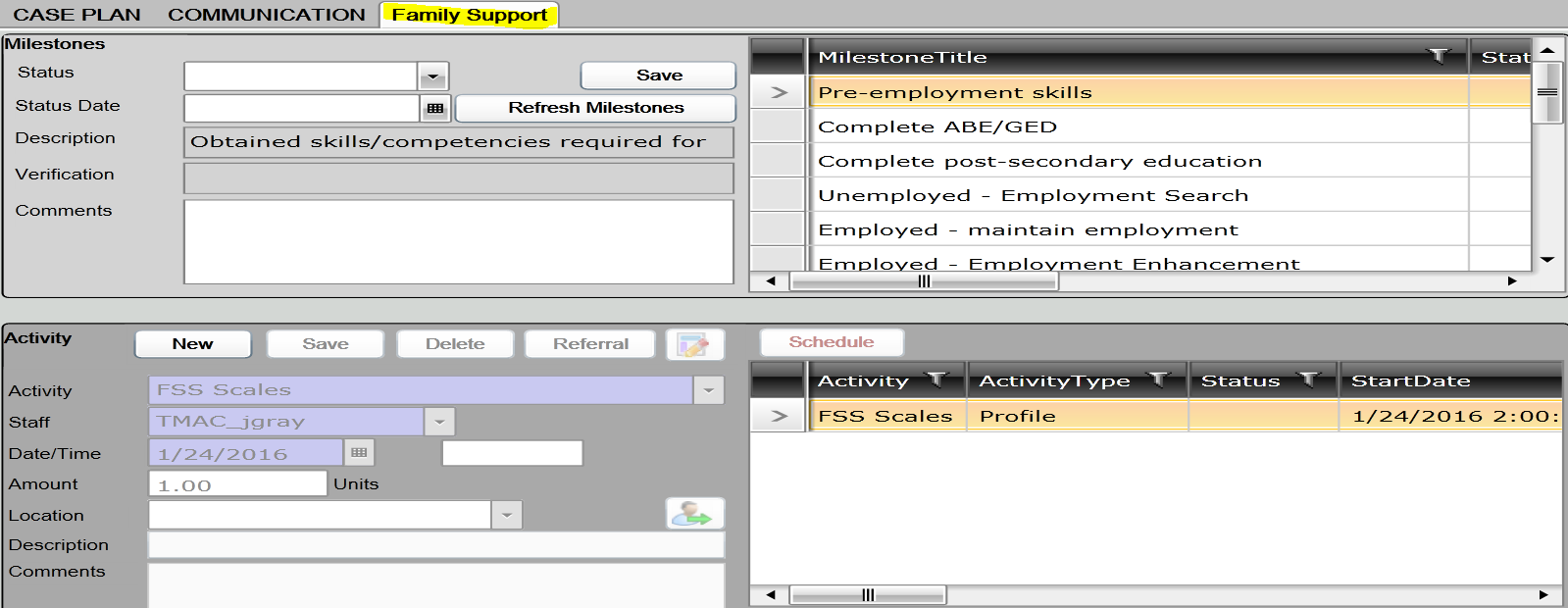
- Will filter to goal domains/components

-show all services client is program activities are currently enrolled.

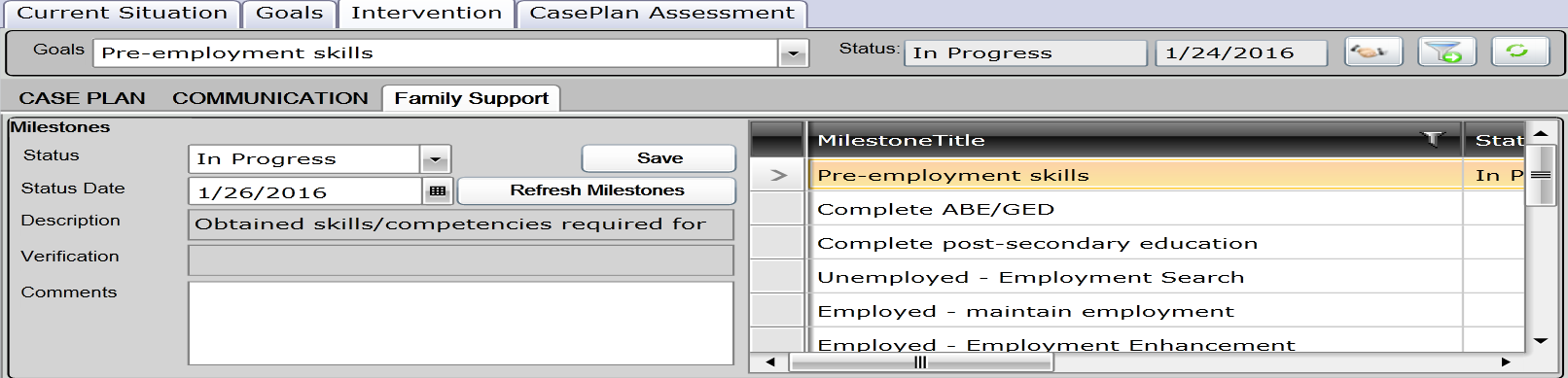
Click 

Family support tab will appear.

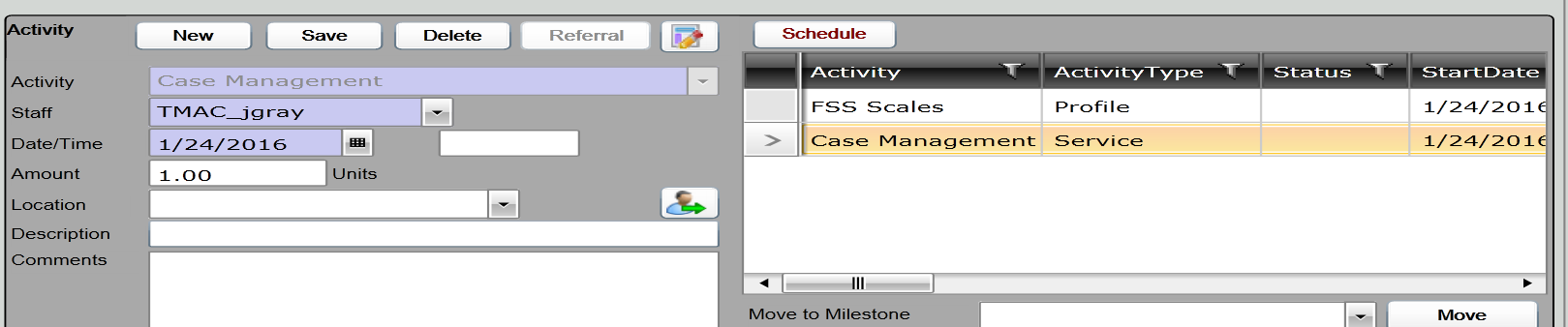
This tab you will link your milestones/identify status/and tie activity to each milestone.

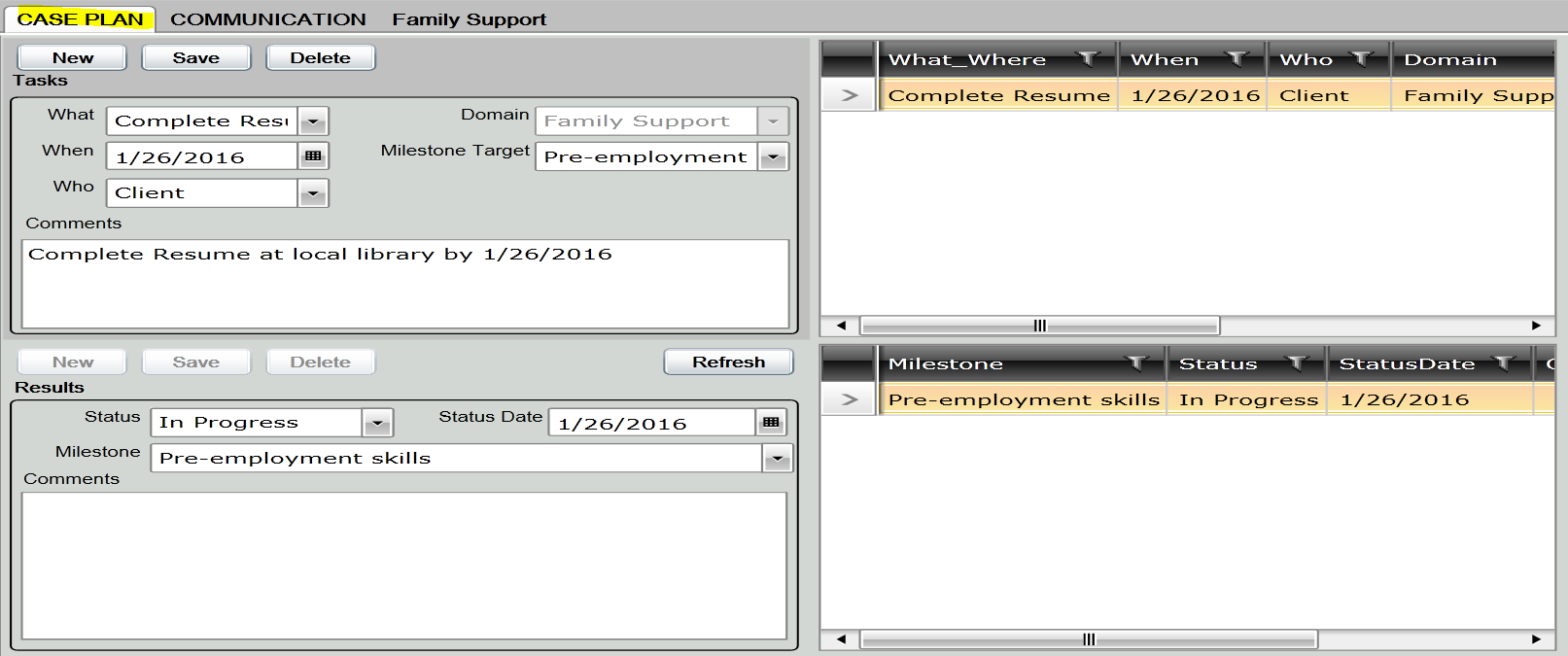


By clicking on milestone on the right this identifies what milestone you are updating. Enter status, date and click save.



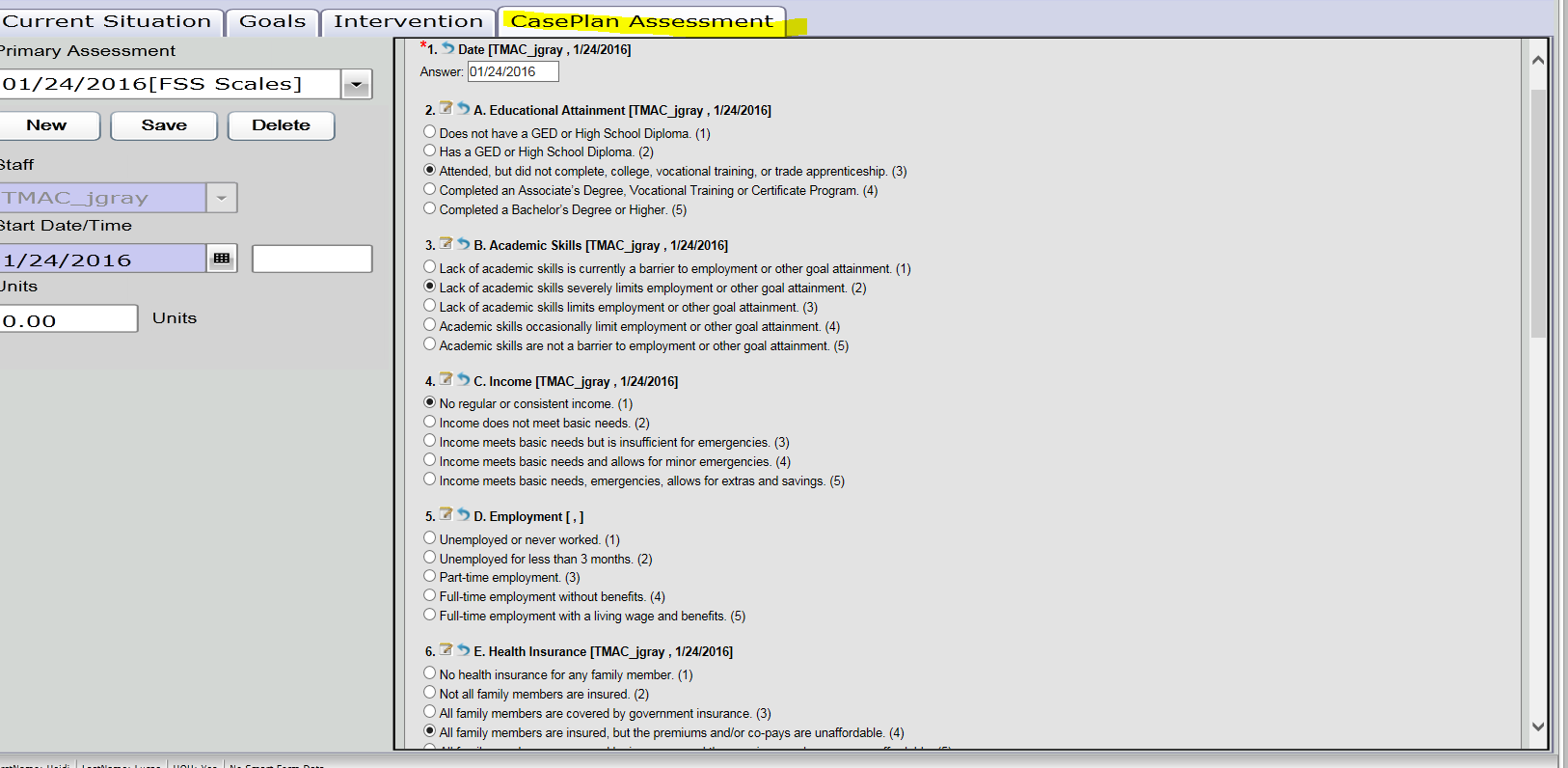
Each milestone must have an activity tied to it to count on the NPI reprots. FSS scale shows on this client because the FSS scale was completed for this milstone. If you want to add an additional milestone click new, choose milestone from drop down and click save.



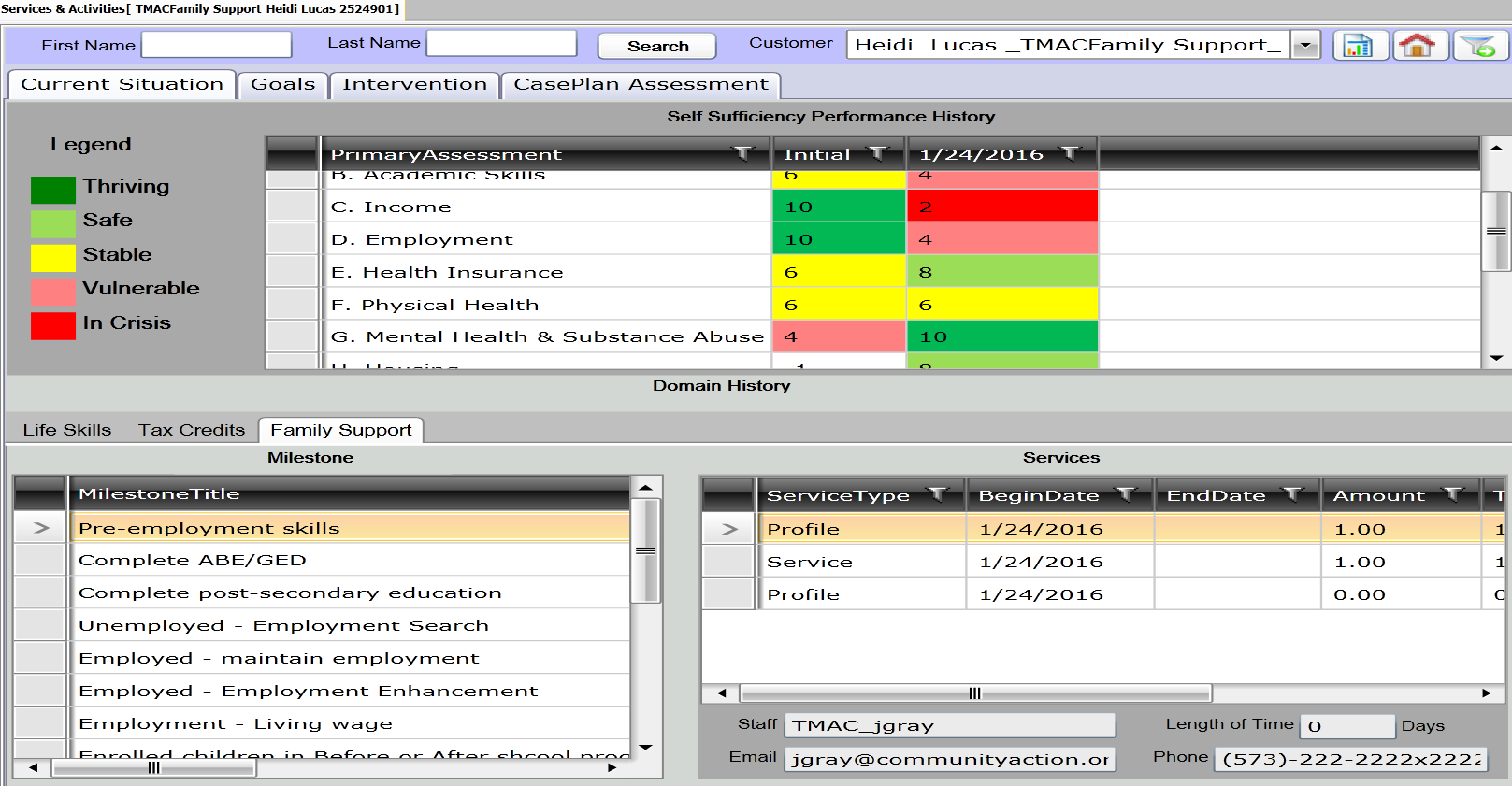
That milestone will now appear on the Case Plan Tab under results. 

On the CasePlan Assessment tab you can additional FSS scales. Your initial FSS will need to be completed on the Program Details Page.

Answer questions and the Save Answers on the bottom of the page. 



Now when I click on the current situation tab it will show my initial FSS and the new one that I have completed.







Click New

Consent-Defaults to Organization.

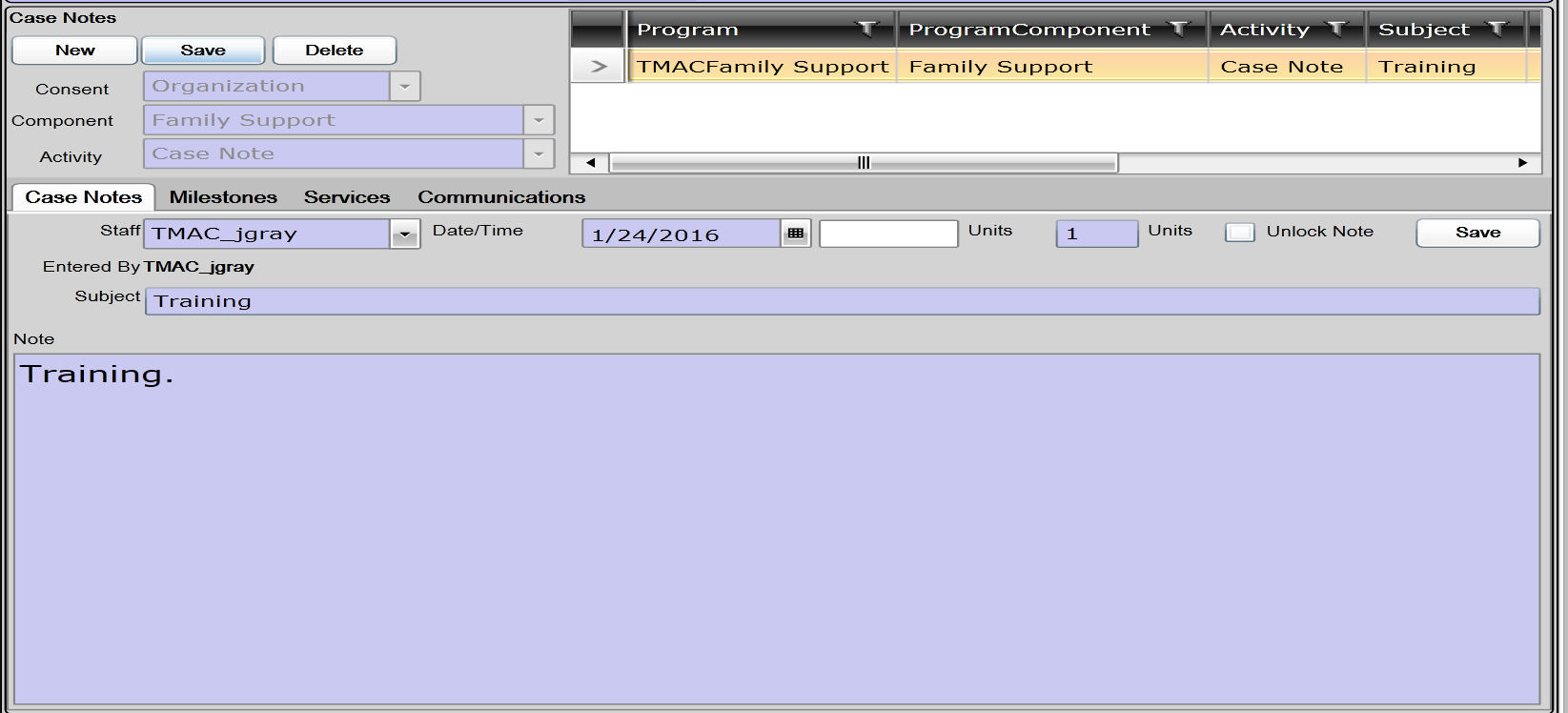
Component-Defaults to Family Support

Activity-Defaults to Case Note

Date-Defaults to date of entry. You can change the date.

Complete-Subject and Note information

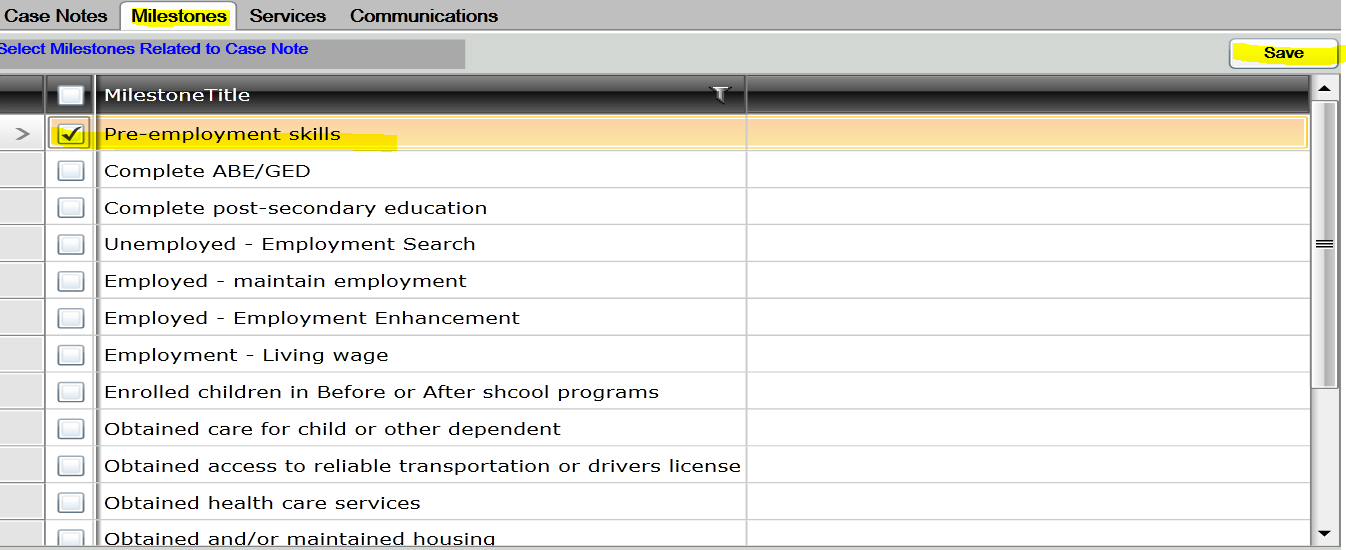
Click Save.



Milestone tab.

Check the box next to the milestone the case note is associated to. (You can select multiple milestones)

Click Save



Services Tab

Check Case Management as the service you are providing to the client. The milestone will appear in the dropbox.

Click Save

