**LIHEAP**

* **Click on Listing** to locate the client in MIS
* **If client in the system**, verify by last 4 of SSN or DOB or County, review the client intake information (contact, demographic and income) update if necessary. Click on the Get LIHEAP button. If all members in the household on the application, the system will add the household members, create LIHEAP program enrollment, populate the question set and create the vendor transaction for the EA payment. *If there is a discrepancy with the EA application & MIS – a message will display and the program enrollment will not be created.*
* **If client not in the system**, add new member and enter client intake information (contact, demographic and income) information. Click on the Get LIHEAP button. If all members in the household on the application, the system add the household members, create LIHEAP program enrollment, populate the question set and create the vendor transaction for the EA payment. *If there is a discrepancy with the EA application & MIS – a message will display and the program enrollment will not be created.*
* **Program Enrollment Created using the Get LIHEAP Button**, to verify the enrollment information, click on Entry to verify the LIHEAP program created, click on questions to verify the questions were answered.
* **Program Enrollment NOT Created using the Get LIHEAP Button**, click on Entry, click new to enroll in LIHEAP program, enter date, click SAVE. Click on the question tab to answer the required questions. Click Save.
* **Create Vendor Payment** – click on new to enter new transaction for client. Follow your agency’s process for entry of transactions. This process has not changed with the new pages.
* **Follow your Agency’s process for transaction approval, batching and reconciliation/paid in MIS.**  This process has not changed with the new pages.

**Emergency Assistance – w/Vendor Payments**

* **Click on Listing** to locate the client in MIS
* **If client in the system**, verify by last 4 of SSN or DOB or County, review the client intake information (contact, demographic and income) update if necessary.
* **If client not in the system**, add new member and enter client intake information (contact, demographic and income) information.
* **Program Enrollment**, click on Entry, click new to enroll in Emergency Assistance program, enter date, click SAVE. If your agency answers questions for Emergency Assistance enrollment, click on the question tab to answer the required questions. Click Save.
* **Create Vendor Payment** – click on new to enter new transaction for client. Follow your agency’s process for entry of transactions. This process has not changed with the new pages.
* **Follow your Agency’s process for transaction approval, batching and reconciliation/paid in MIS.**  This process has not changed with the new pages.
* **Services & Activities**  - the service is created on the Services & Activities under the Intervention Tab. Once the payment has been made, the milestone will be set to complete.

**Emergency Assistance – Services &**

**Activities**

* **Click on Listing** to locate the client in MIS
* **If client in the system**, verify by last 4 of SSN or DOB or County, review the client intake information (contact, demographic and income) update if necessary.
* **If client not in the system**, add new member and enter client intake information (contact, demographic and income) information.
* **Program Enrollment**, click on Entry, click new to enroll in Emergency Assistance program, enter date, click SAVE. If your agency answers questions for Emergency Assistance enrollment, click on the question tab to answer the required questions. Click Save.
* **Add Services & Activity** – click on Services & Activities, click on Intervention Tab – if the program component on the organization/program targets page is set to auto create, the activity will automatically be entered on the services & activities/intervention tab page under that activity. Click on the component, click on the new to enter new service for client. Click Save.
* if the component is not set to auto create, you cannot add the program component using the new pages, will need to use the old Service & Activity Page, Jayna is working with a possible solution with Adsystech

1. Create a program component – emergency services – add all the activities under that component (similar to family support)
2. Add the ability to create a program component to the Services & Activities page

* **Follow your Agency’s process for transaction approval, batching and reconciliation/paid in MIS.**  This process has not changed with the new pages.

**Substance Abuse and/or Anger Management**

* **Click on Listing** to locate the client in MIS
* **If client in the system**, verify by last 4 of SSN or DOB or County, review the client intake information (contact, demographic and income) update if necessary.
* **If client not in the system**, add new member and enter client intake information (contact, demographic and income) information.
* **Assessment** – using the paper intake as a guide, create an abbreviated assessment for the client.
* **Referral** – add appropriate referrals for client based on paper intake.
* **Program Enrollment**, click on Entry, click new to enroll in Substance Abuse and/or Anger Management program, enter date, click SAVE. There is no question set for Substance Abuse/Anger Management Program.
* **Services & Activities** – the program components are set to auto create on the Organization/program targets page, so the activity will automatically be created on the services & activities/intervention page. Click on the component to view the service. If new service, the milestone status and date will need to be updated. Once the client has completed the program, the status should be changed to complete.

**Weatherization Program**

* **Click on Listing** to locate the client in MIS
* **If client in the system**, verify by last 4 of SSN or DOB or County, review the client intake information (contact, demographic and income) update if necessary.
* **If client not in the system**, add new member and enter client intake information (contact, demographic and income) information.
* **Program Enrollment**, click on Entry, click new to enroll in Weatherization Program, enter date, click SAVE. Click on the question tab to answer the questions for Weatherization enrollment. Click Save. Go back to the Entry tab and click on the ‘Send to State’ button. This button exports the client demographic date from MIS to MoWAP.

**\*\*\* the button does not currently display on the entry page, Jayna working with Adsystech to resolve \*\*\***

**\*\*\* Also the export of data is not working, Kurt & Jayna working with Adsystech and MoWAP Support to get it resolved \*\*\***

**Life Skills**

* **Click on Listing** to locate the client in MIS
* **If client in the system**, verify by last 4 of SSN or DOB or County, review the client intake information (contact, demographic and income) update if necessary.
* **If client not in the system**, add new member and enter client intake information (contact, demographic and income) information.
* **Program Enrollment**, click on Entry, click new to enroll in Life Skills, enter date, click SAVE.
* **Services & Activities** – the life skill classes/activities will display. Click on the Intervention Tab to enter the service/activity.
* **Program Details**  - on the Client Profile tab enter program component – Life Skills, select the appropriate milestone, activity = Pre/Post Test, accept or enter date, click save. Click on the Question tab to input the scores.

**Tax Assistance**

* **Click on Listing** to locate the client in MIS
* **If client in the system**, verify by last 4 of SSN or DOB or County, review the client intake information (contact, demographic and income) update if necessary.
* **If client not in the system**, add new member and enter client intake information (contact, demographic and income) information.
* **Program Enrollment**, click on Entry, click new to enroll in Tax Assistance, enter date, click SAVE.
* **Program Details**  - on the Client Profile tab enter program component – Tax Credits, select the appropriate milestone, activity = Tax Assistance Assessment, accept or enter date, click save. Click on the Question tab to input the scores.
* **Services & Activities** –Click on the Intervention Tab update the Milestone activity.

**Family Support**

* **Click on Listing** to locate the client in MIS
* **If client in the system**, verify by last 4 of SSN or DOB or County, review the client intake information (contact, demographic and income) update if necessary.
* **If client not in the system**, add new member and enter client intake information (contact, demographic and income) information.
* **Program Enrollment**, click on Entry, click new to enroll in Family Support, enter date, click SAVE.
* **Program Details**  - on the Client Profile tab enter program component – Family Support, select the appropriate milestone, activity = FSS Scale, accept or enter date, click save. Click on the Question tab to input the scores.
* **Services & Activities:** -
  + Current Situation tab to view the FSS results.
  + Under to Goals tab – enter current situation, goal, and status.
  + Go to the Intervention tab, Select Case Plan, enter tasks. Click on the Filter button – Family Support tab will display and milestones/status and activities can be entered/updated.
  + The Case Plan Assessment tab will allow additional assessment/FSS scale to be completed.
  + Click on Case Notes to enter notes pertaining to the client visit.
  + Click on the milestone tab to attach case note to a milestones for the client.
  + Click on Services tab to enter tied the service you provided to the client.