



The Center for Applied
Management Practices

2023

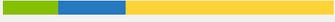


eLogicGenesis® 

GENERAL GUIDEBOOK



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eLogic Genesis

WELCOME MESSAGE



The Center for Applied
Management Practices

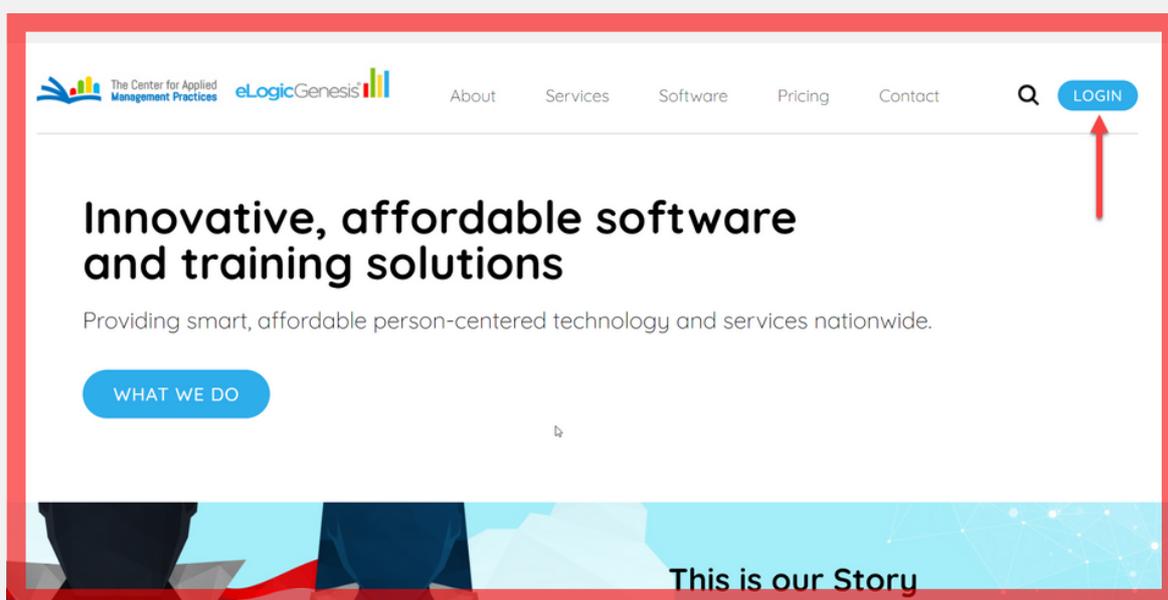
eLogicGenesis® 

Welcome to eLogic Genesis Software! We are delighted to have you as a user of our powerful software product. Whether you're a seasoned professional or just starting, our software is designed to streamline your work and enhance productivity.

With our intuitive interface and robust features, you'll be able to tackle complex tasks with ease. Our software offers various tools to meet your needs, from data analysis to project management. We're constantly innovating and improving our product to stay ahead of industry trends and ensure you have the best experience possible. We value your feedback and are here to support you every step of the way.

Our dedicated customer support team is ready to assist you with any questions, concerns, or suggestions. We're committed to your success and look forward to being a trusted partner in your journey.

LOGGING IN



Navigate to the eLogic Genesis website. and click the blue login button located in the top right corner.

LOGGING IN

eLogicGenesis

Login

Email

Password

Login

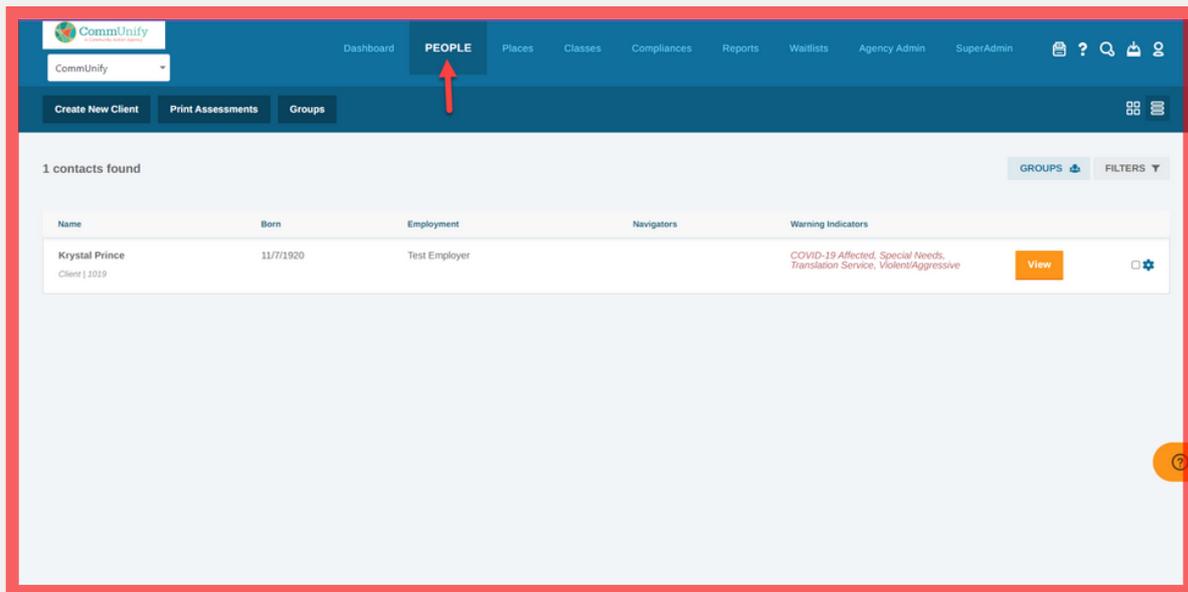
[Forgot password?](#)

For the best user experience, eLogic Genesis should be used with the Google Chrome browser.

Enter your email address and temporary password in the designated boxes on the login page, then click the login button.

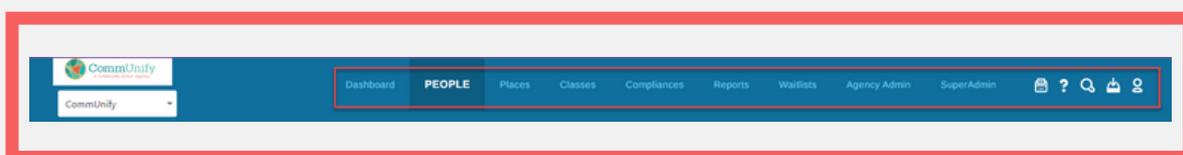
Note: This screen will be displayed when you click the link in your email.

LOGGING IN



You will see the landing page (People subtab) when you first log in. Note: Some tabs will not be visible on the landing page because of the enabled role permissions.

SYSTEM NAVIGATION BAR

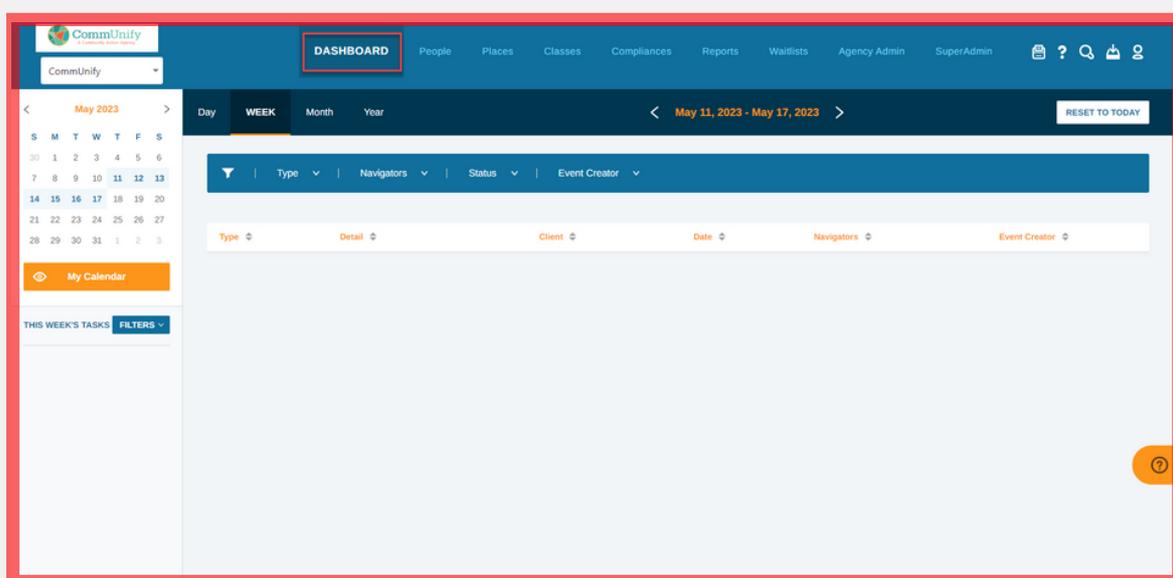


The System Navigation Bar is at the top of the eLogic Genesis home screen and is always available during a session.

The tabs on the System Navigation Bar change depending on your role when you log in. If you don't see one or more of the tabs listed below, your agency administration has disabled that tab for your role.

SYSTEM NAVIGATION BAR

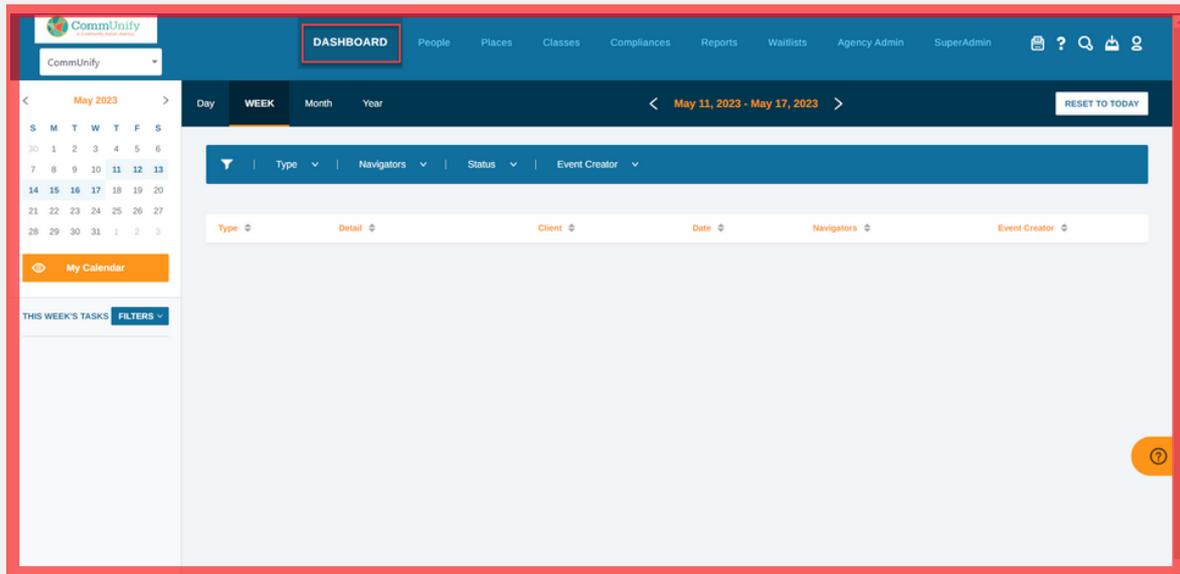
DASHBOARD



The Dashboard tab helps keep your caseload organized by displaying client events and due dates in one place. There are three key areas of the Dashboard tab: **Interactive Calendar**, **Date Navigation Bar**, and **Filter Options**.

SYSTEM NAVIGATION BAR

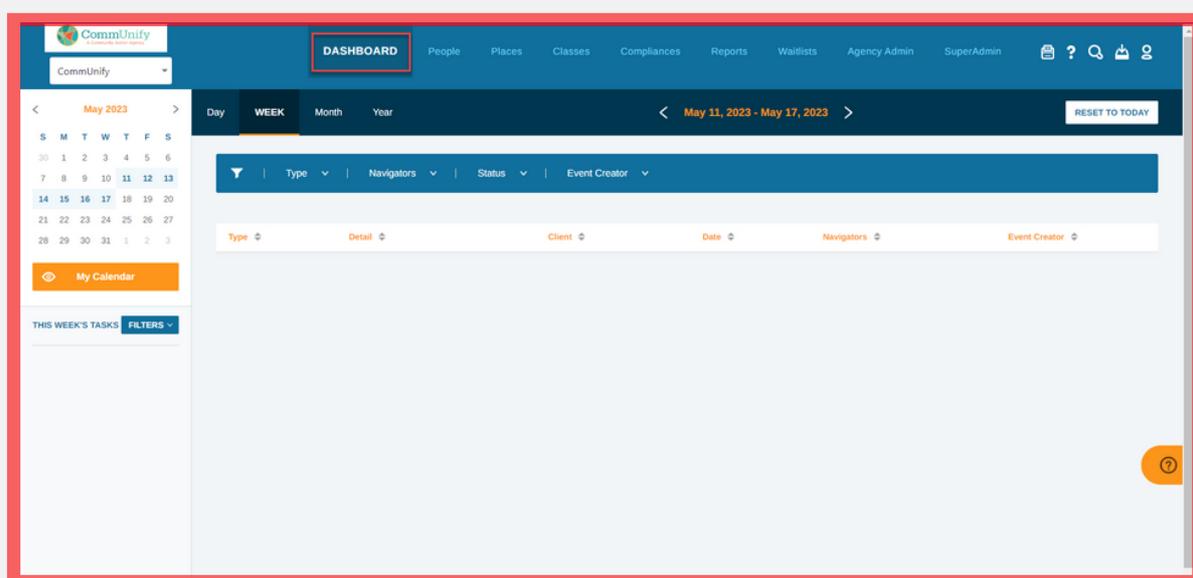
DASHBOARD



To access client events quickly, use the calendar module located at the upper left corner of the Dashboard interface.

SYSTEM NAVIGATION BAR

DASHBOARD



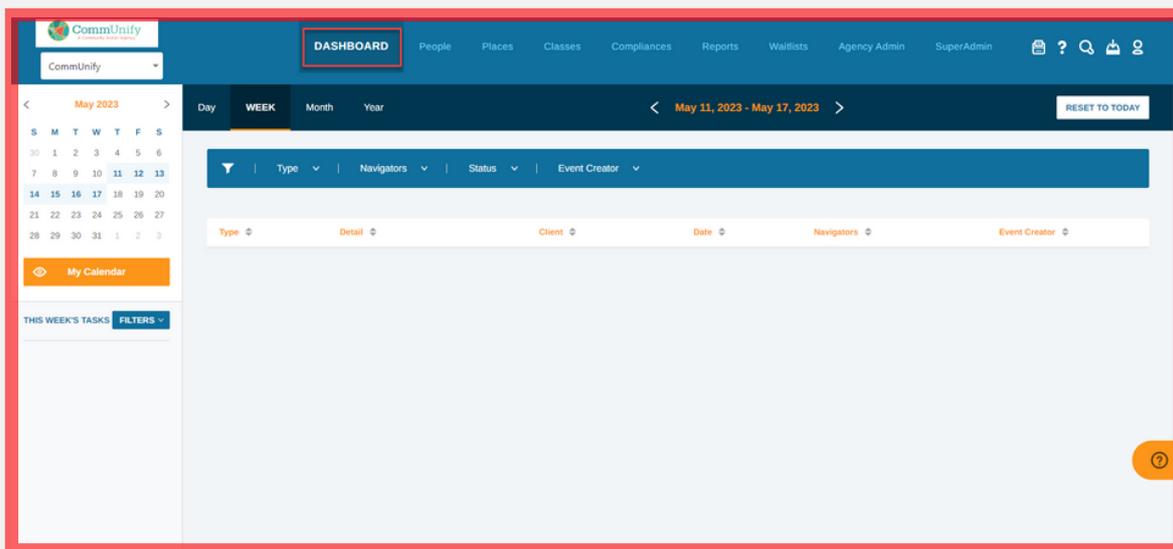
Observe the elevated date navigation bar that extends across the upper section of the dashboard.

Use the time frame toggles provided to explore client events from a specific starting day.

These toggles include days, weeks, months, and years.

SYSTEM NAVIGATION BAR

DASHBOARD



At the top of the Dashboard's main screen, Dashboard events can be filtered by: **Type** refers to the specific system area encompassing each event displayed on the Dashboard. **Navigators** allows you to filter dashboard events by selecting or deselecting other navigators. **Status** allows for event filtering based on the event or due date. **Event Creator** presents a list of all navigators who have created an event in the client records that are currently being displayed.

SYSTEM NAVIGATION BAR

DASHBOARD RESOURCES



For more in-depth information on this tab, click here:

<https://ellogicgenesis.zendesk.com/hc/en-us/articles/360049113033>

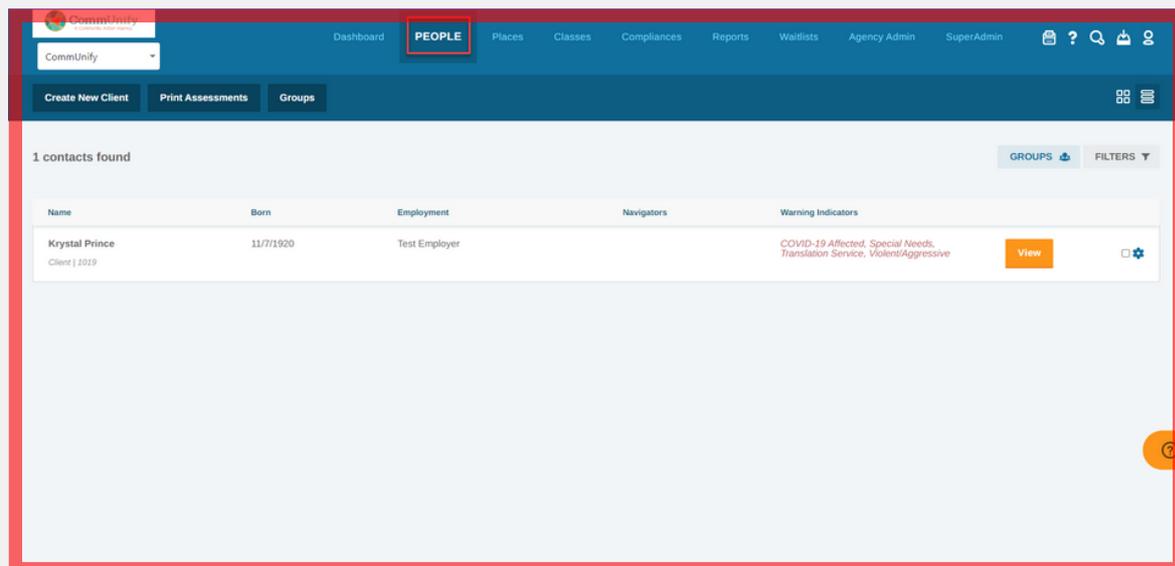
To watch a video walkthrough of how the Dashboard works, click here:

<https://ellogicgenesis.zendesk.com/hc/en-us/articles/360047999794>



SYSTEM NAVIGATION BAR

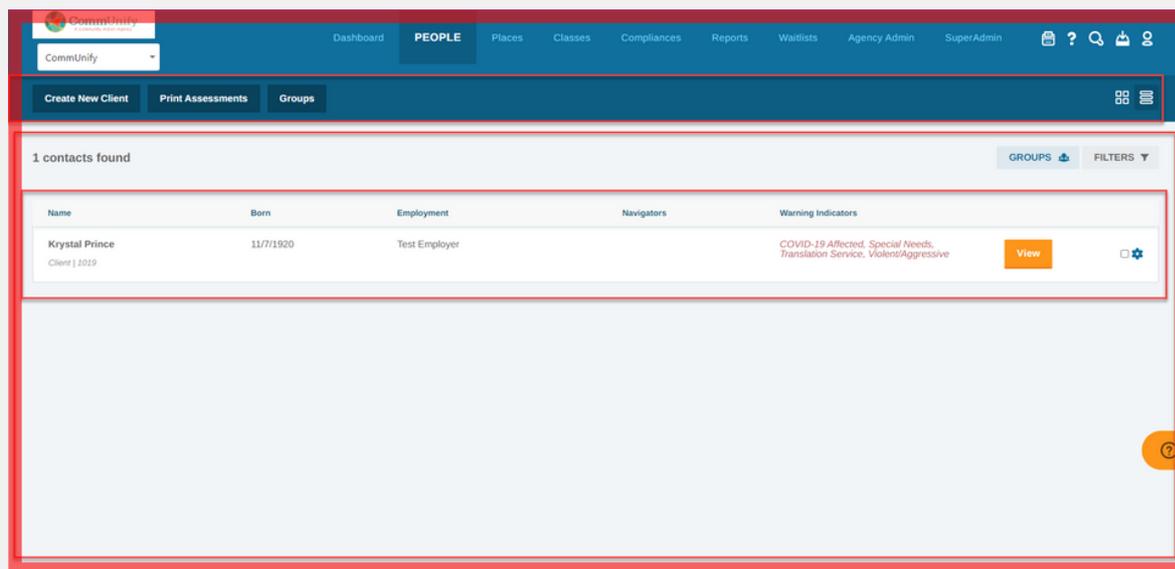
PEOPLE TAB



When logging into your account, the **People** tab will be displayed by default. It stores all personal records in eLogic Genesis, whether client or navigator records. The People Tab comprises three primary sections: the **Sub-navigation bar**, the **Main Screen**, and the **Client List**.

SYSTEM NAVIGATION BAR

PEOPLE TAB



The Sub-navigation Bar is positioned immediately below the system navigation bar.

The Main Screen section encompasses supplementary details and filtering tools for the displayed records.

The Client List comprises individual records that exhibit supplementary details. Click View to open the record to the intake page.

SYSTEM NAVIGATION BAR

PEOPLE TAB

The screenshot displays the CommUnity system interface. At the top, a navigation bar includes 'Dashboard', 'PEOPLE', 'Places', 'Classes', 'Compliances', 'Reports', 'Waitlists', 'Agency Admin', and 'SuperAdmin'. Below this, a secondary navigation bar lists 'DEFAULT', 'Goal Plans', 'Programs/Apps', 'Employment', 'Education', 'Trainings', 'Services', 'Weatherization', and 'Forms'. The main content area shows a client record for 'Krystal Prince' (Client | 10219). The record is categorized as 'Basic' and includes several intake pages: 'Violent/Aggressive', 'Translation Service', 'Special Needs', and 'COVID-19 Affected'. The record was created on 05/03/2023 at 1:13 PM. The 'Basic' tab is active, showing fields for Title, Middle Name, Suffix, Other Name, Secondary Email, Mobile Phone, Message Phone, First Name (Krystal), Last Name (Prince), Display Name, Email (ksprince07@gmail.com), Home Phone ((530) 555-8450), Work Phone ((581) 555-7059), and Birth Date* (11/07/1920). The client's age is listed as 32.

Upon opening a client record, you will be directed to the primary intake or default page. The system allows multiple intake pages to be associated with a single client record.

The intake pages and fields are tailored to your specific role for optimal customization. For client records, roles with more extensive interaction with clients will typically have more intake field options available.

SYSTEM NAVIGATION BAR

PEOPLE TAB

The screenshot shows the CommUnity system interface. The top navigation bar includes 'Dashboard', 'PEOPLE', 'Places', 'Classes', 'Compliances', 'Reports', 'Waitlists', 'Agency Admin', and 'SuperAdmin'. Below this is a secondary navigation bar with 'DEFAULT', 'Goal Plans', 'Programs/Apps', 'Employment', 'Education', 'Trainings', 'Services', 'Weatherization', and 'Forms'. The main content area is titled 'Basic' and displays a form for 'Krystal Prince', a Client | 2019. The form includes fields for Title, Middle Name, Suffix, Other Name, Secondary Email, Mobile Phone, Message Phone, First Name, Last Name, Display Name, Email, Home Phone, Work Phone, and Birth Date*. A red box highlights the record information box on the left, which contains the client's name, a 'Change' button, four warning indicators (Violent/Aggressive, Translation Service, Special Needs, COVID-19 Affected), and the creation date (05/03/2023 1:13 PM). Below the record information box are sections for 'Interactions', 'Contacts', and 'Notes'.

The record information box is the area above the left sidebar in client records that displays: **Name**, **Uploaded image**, if the record belongs to a Client or agency Employee, **Case number**, if the record has a **Client Account**, any selected **Warning Indicators**, and **Created date**.

SYSTEM NAVIGATION BAR

PEOPLE TAB

The screenshot displays the 'PEOPLE' tab in a system navigation bar. The client record for 'Krystal Prince' is shown, with a 'Basic' tab selected. The record information box on the left contains the following details:

- Client Name:** Krystal Prince
- Client Type:** Client | 2019
- Created:** 05/09/2023 1:13 PM
- Navigation Icons:** Status (Client Type dropdown), Record Status, Client Portal Status, Groups, Navigators, and Options.

The main record information box contains the following fields:

- Title:** [Empty]
- Middle Name:** [Empty]
- Suffix:** [Empty]
- Other Name:** [Empty]
- Secondary Email:** [Empty]
- Mobile Phone:** (189) 555-5984
- Message Phone:** [Empty]
- First Name:** Krystal
- Last Name:** Prince
- Display Name:** [Empty]
- Email:** ksprince07@gmail.com
- Home Phone:** (530) 555-8450
- Work Phone:** (581) 555-7059
- Birth Date:** 11/07/1920

Below the record information box are four navigation icons: **Status** shows Client Type dropdown menu, Record Status, and Client Portal Status. **Groups** shows all assigned Groups. **Navigators** shows all assigned Navigators. **Options** allows you to send direct Client Portal invitations and delete records.

SYSTEM NAVIGATION BAR

PEOPLE TAB

The screenshot displays the CommUnity system interface. The top navigation bar includes 'Dashboard', 'PEOPLE', 'Places', 'Classes', 'Compliances', 'Reports', 'Waitlists', 'Agency Admin', and 'SuperAdmin'. Below this, a secondary navigation bar lists 'DEFAULT', 'Goal Plans', 'Programs/Apps', 'Employment', 'Education', 'Trainings', 'Services', 'Weatherization', and 'Forms'. The main content area shows a client record for 'Krystal Prince' (Client | 1029). The record is divided into two sections: 'Basic' and 'Interactions'. The 'Basic' section contains fields for Title, Middle Name, Suffix, Other Name, Secondary Email, Mobile Phone, Message Phone, First Name, Last Name, Display Name, Email, Home Phone, Work Phone, and Birth Date. The 'Interactions' section is highlighted with a red box and contains a dropdown menu with options for 'Interactions', 'Contacts', and 'Notes'.

Client record tabs are under the navigation icons on the left sidebar. Each has a distinct purpose. For example, **Contacts** allow navigators to enter a client's important contacts. **Interactions** enable navigators to "tally" every time they've interacted with a client. In **Notes**, case notes are stored, organized, and accessible.

SYSTEM NAVIGATION BAR

PEOPLE TAB RESOURCES



For more in-depth information on this tab, click here:

<https://ellogicgenesis.zendesk.com/hc/en-us/articles/360050074253>

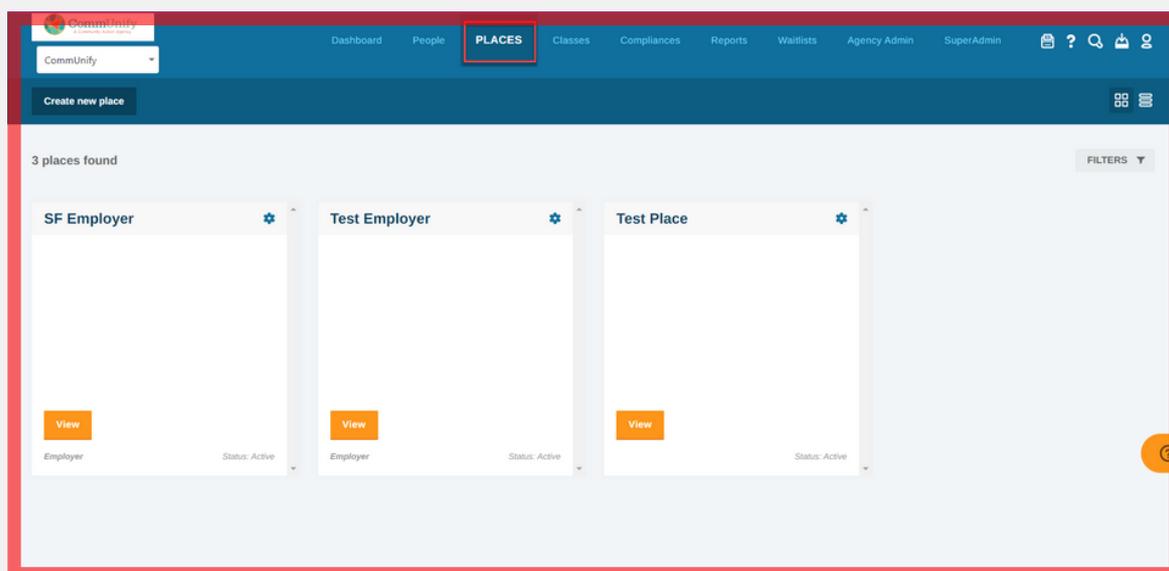
To watch a video walkthrough of how the People Tab works, click here:

<https://ellogicgenesis.zendesk.com/hc/en-us/articles/360047999914>



SYSTEM NAVIGATION BAR

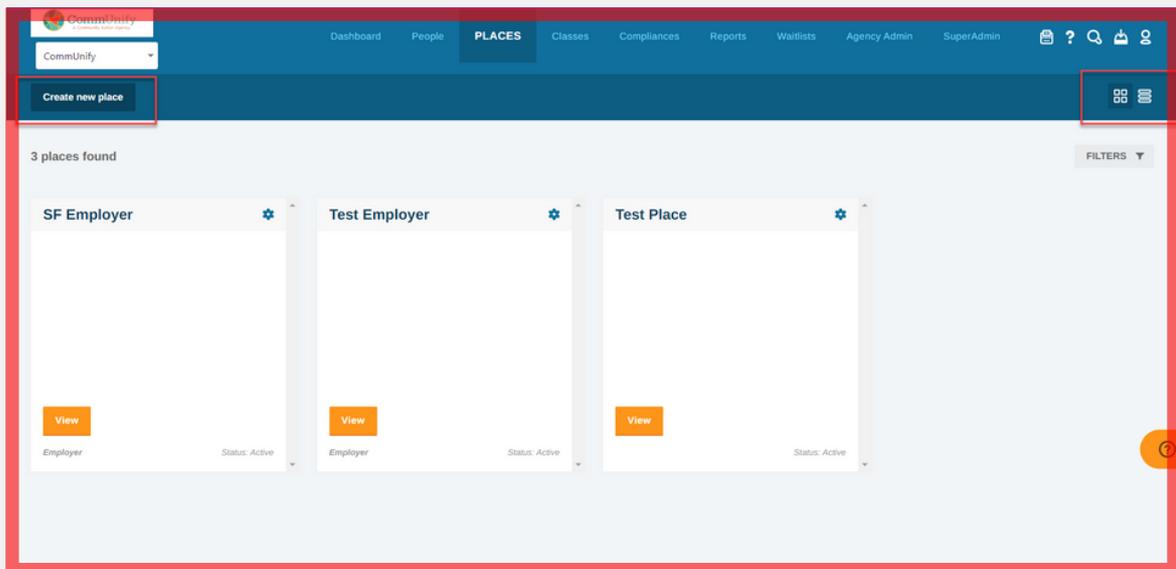
PLACES TAB



The Places tab stores all Employers, Referral Agencies, and Educational Institutions that have been created in eLogic Genesis. It comprises three primary sections: The **Sub-navigation bar**, the **Main Screen**, and the **Places list**.

SYSTEM NAVIGATION BAR

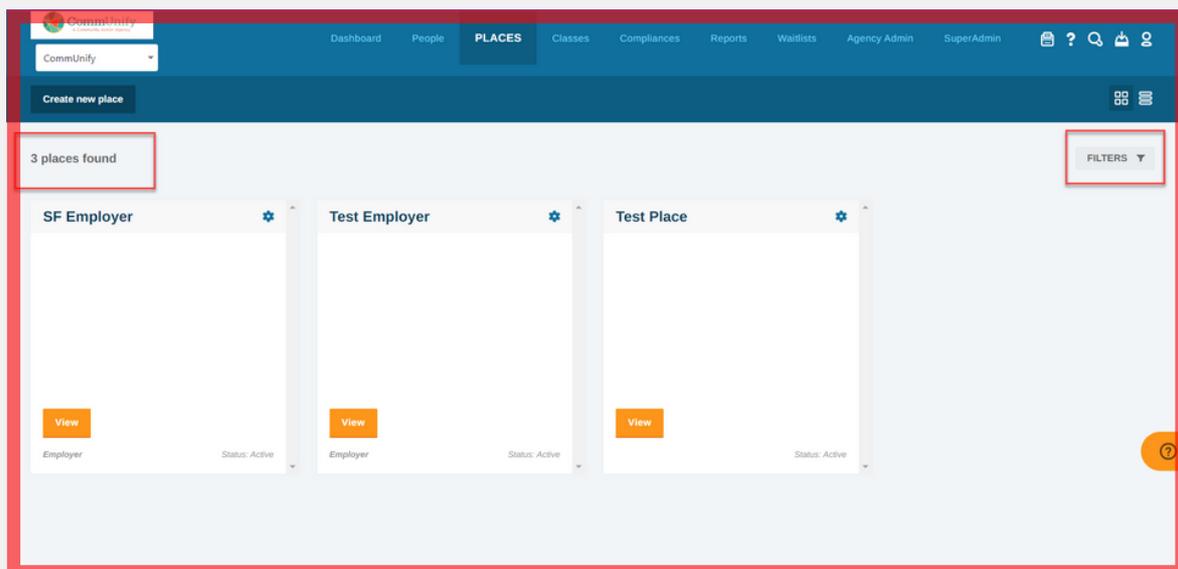
PLACES TAB



The sub-navigation bar is the bar located directly under the System Navigation Bar. Its tools and features include: **Create New Place** allows you to create a place in the system. **Grid View/List View** allow you to see the places in a grid or list format.

SYSTEM NAVIGATION BAR

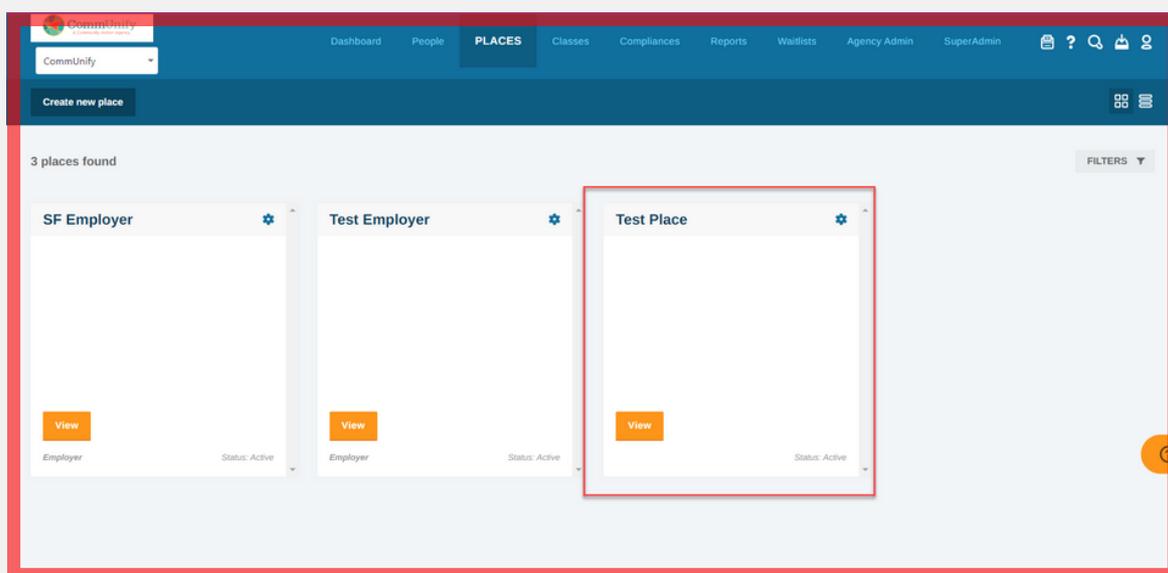
PLACES TAB



The **Main Screen** section contains additional information and tools to filter places displayed such as: the **Places count** feature displays the number of Referral Agencies, Employers, and Educational Institutions currently visible based on the selected Filter criteria. **Filters** will narrow down which places are shown on the page based on each filter setting.

SYSTEM NAVIGATION BAR

PLACES TAB



Under the Place List, each tile displays additional information, which includes: **Place name**, **Address**, **Contact**, **Place Type**, and **Place Status**.

Click **View** to open the place.

SYSTEM NAVIGATION BAR PLACES TAB RESOURCES



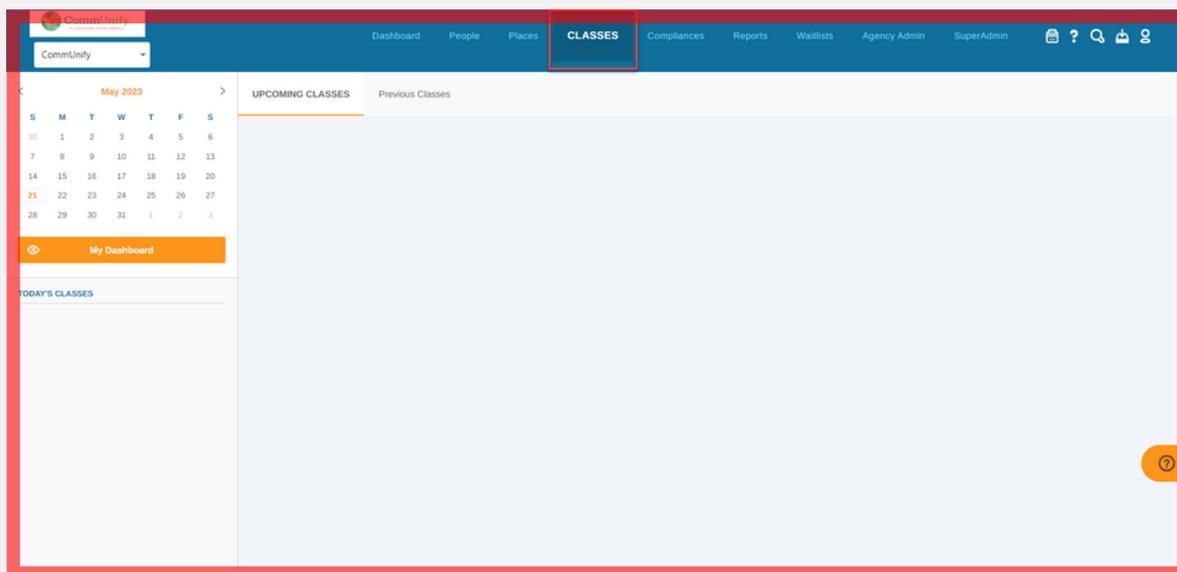
For more in-depth information on this tab, click here:

<https://ellogicgenesis.zendesk.com/hc/en-us/articles/360048500373>



SYSTEM NAVIGATION BAR

CLASSES TAB

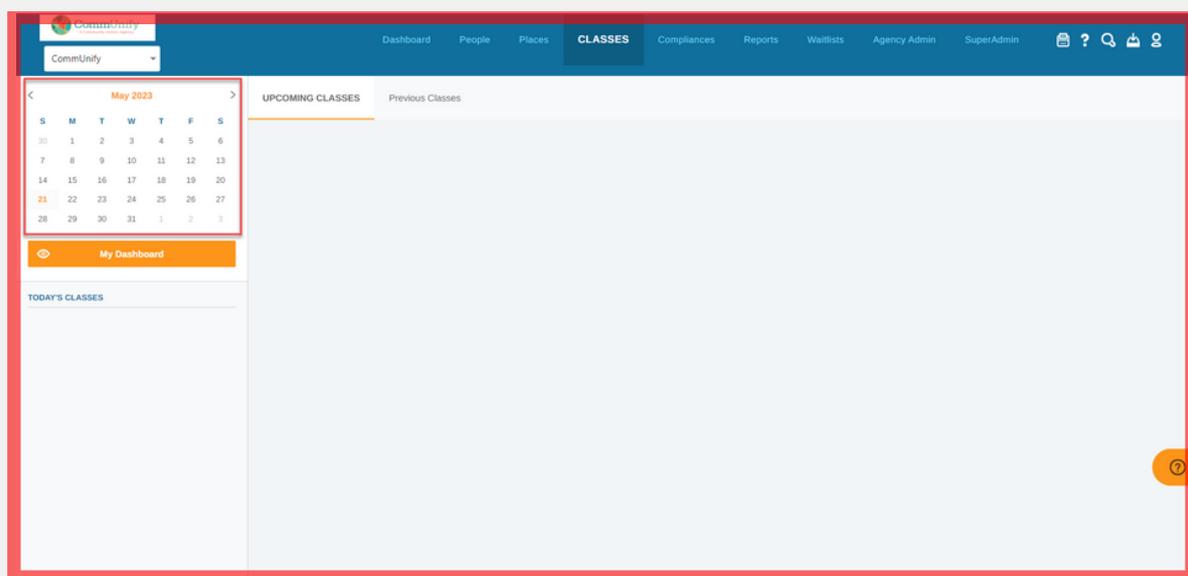


The Classes feature makes it possible to record registrants and take attendance using eLogic Genesis for any classes or trainings offered by your organization.

Note: A role permission from an Agency Admin is required to view this tab.

SYSTEM NAVIGATION BAR

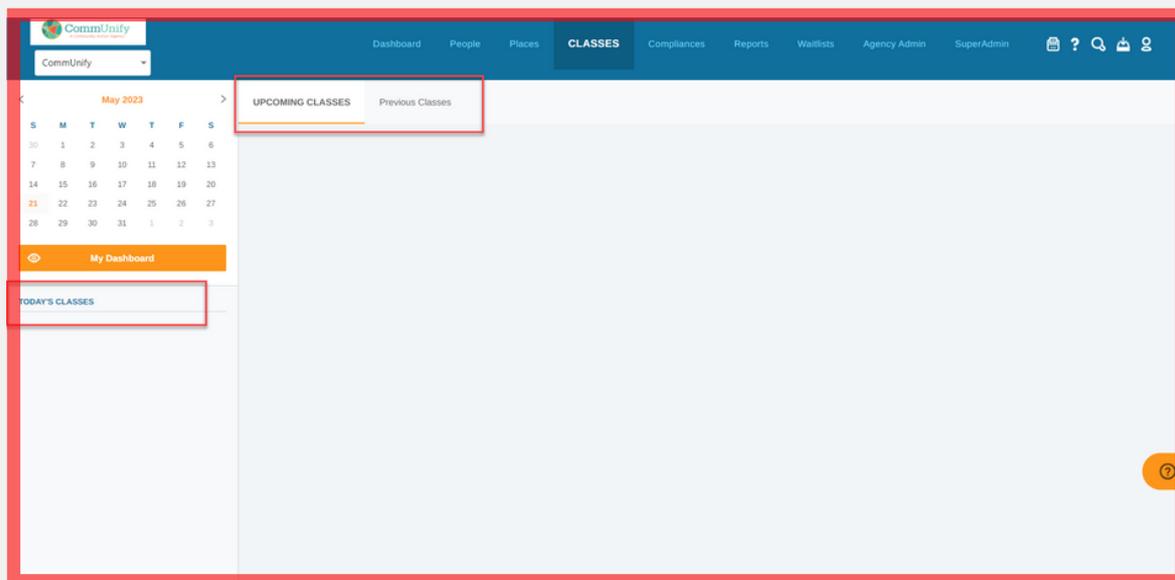
CLASSES TAB



To access designated class dates for clients, use the **calendar** module located at the upper left corner of the Classes interface.

SYSTEM NAVIGATION BAR

CLASSES TAB

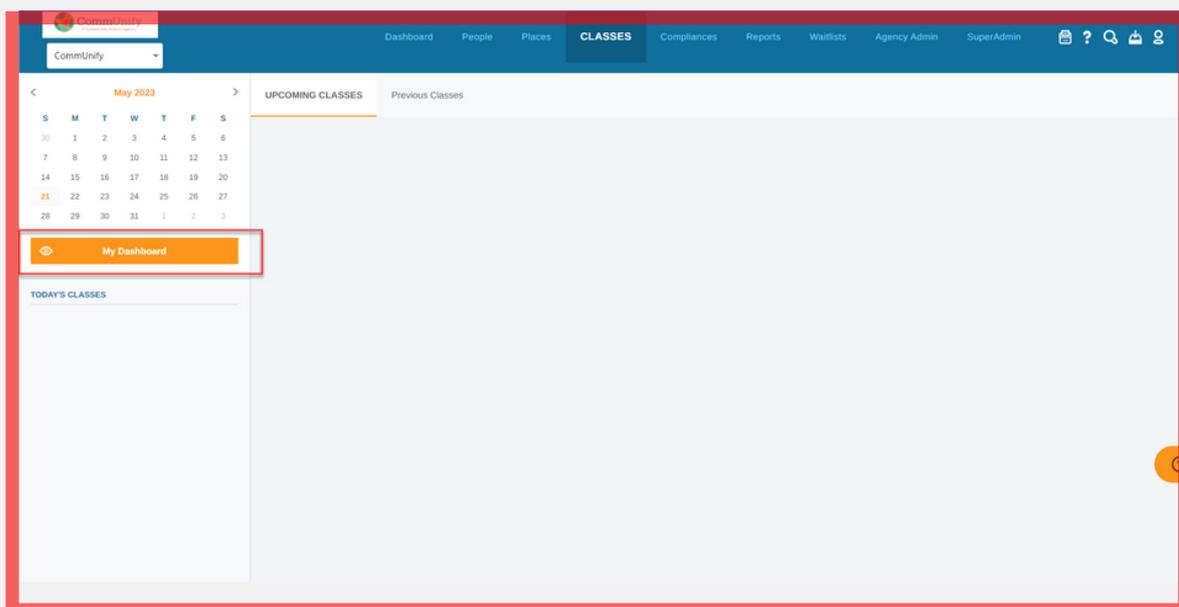


You can also view upcoming/current and previous classes.

To view **Upcoming/Current Classes**, Click Classes from the system navigation bar. All current classes will be listed below. **TODAY'S CLASSES** will be listed on the left under the calendar. To View **Previous Classes**, Click the Previous Classes toggle. All previous classes will be listed below.

SYSTEM NAVIGATION BAR

CLASSES TAB



Clicking the **My Dashboard** button located under the calendar will take you back to the main dashboard from the the Dashboard tab, where your caseload is organized by displaying all client events and due dates in one place.

SYSTEM NAVIGATION BAR

CLASSES TAB RESOURCES



For more in-depth information on this tab, click here:

<https://ellogicgenesis.zendesk.com/hc/en-us/articles/360049262614>

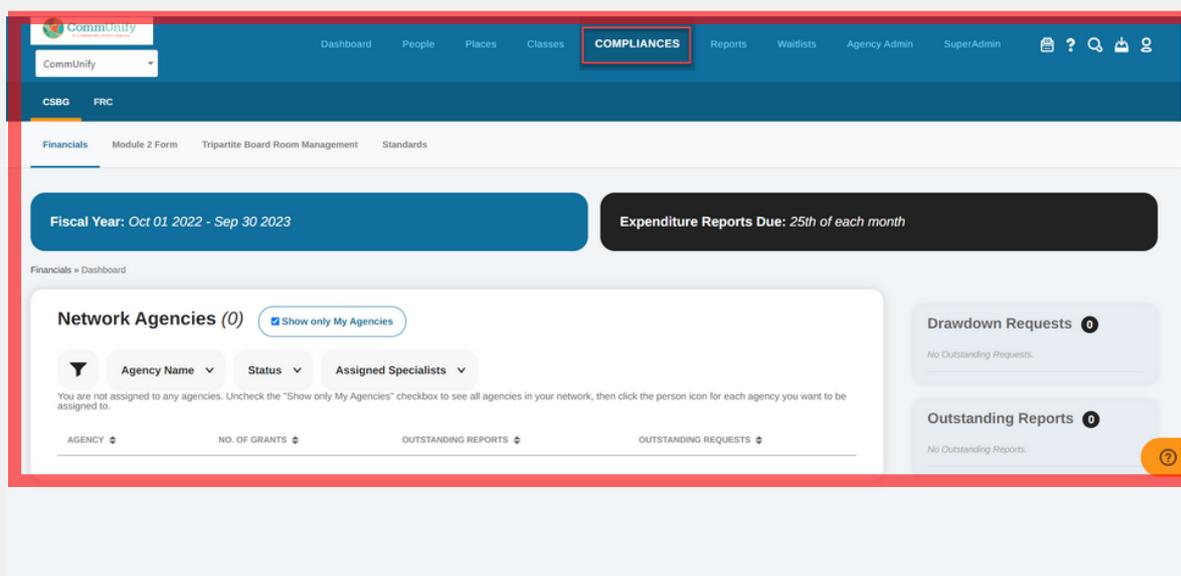
To watch a video walkthrough of how the Dashboard works, click here:

<https://ellogicgenesis.zendesk.com/hc/en-us/articles/360047989334>



SYSTEM NAVIGATION BAR

COMPLIANCES TAB



The Compliances tab is where you can access information regarding CSBG and FRC compliances.

Access to the Compliances tab is restricted to administrators or users with specific permissions.

SYSTEM NAVIGATION BAR

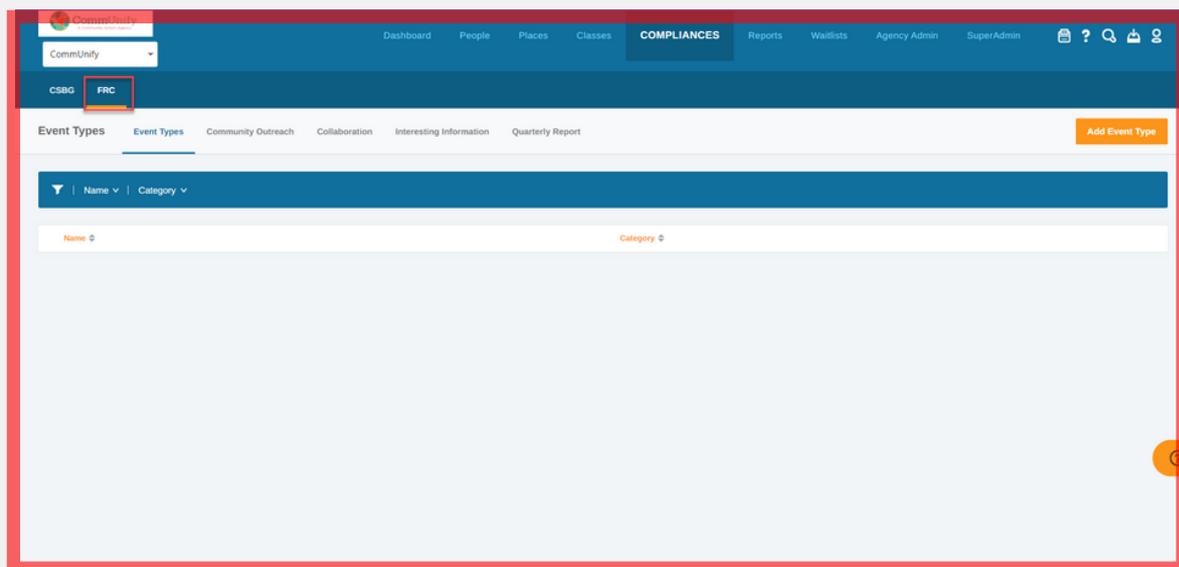
COMPLIANCES TAB

The screenshot shows the system navigation bar with the following items: Dashboard, People, Places, Classes, **COMPLIANCES**, Reports, Waitlists, Agency Admin, and SuperAdmin. Below the navigation bar, the CSBG section is highlighted, showing sub-tabs for Financials, Module 2 Form, Tripartite Board Room Management, and Standards. The main content area displays the Fiscal Year (Oct 01 2022 - Sep 30 2023) and Expenditure Reports Due (25th of each month). The Network Agencies (0) section includes a 'Show only My Agencies' checkbox and filters for Agency Name, Status, and Assigned Specialists. A table with columns for AGENCY, NO. OF GRANTS, OUTSTANDING REPORTS, and OUTSTANDING REQUESTS is visible. On the right, there are two summary cards: Drawdown Requests (0) and Outstanding Reports (0), both showing 'No Outstanding Requests'.

In the CSBG section, you can access Financials data, Standards data, the Module Two Form, and the Tripartite Board Manager.

SYSTEM NAVIGATION BAR

COMPLIANCES TAB



Under the FRC subsection, you can find data about Event Types, Community Outreach initiatives, Collaboration efforts, Quarterly Reports, and any additional Interesting Information.

SYSTEM NAVIGATION BAR

COMPLIANCES RESOURCES



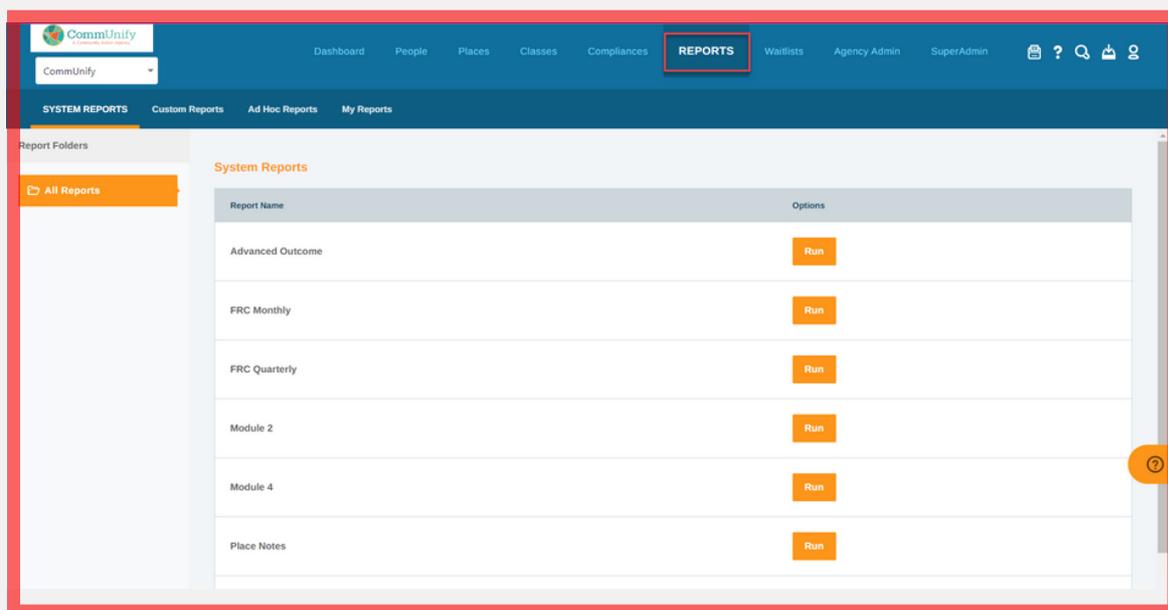
Read more about the Compliances Tab here:

<https://ellogicgenesis.zendesk.com/hc/en-us/articles/360049323034-System-Navigation-Bar-The-Basics>



SYSTEM NAVIGATION BAR

REPORTS TAB

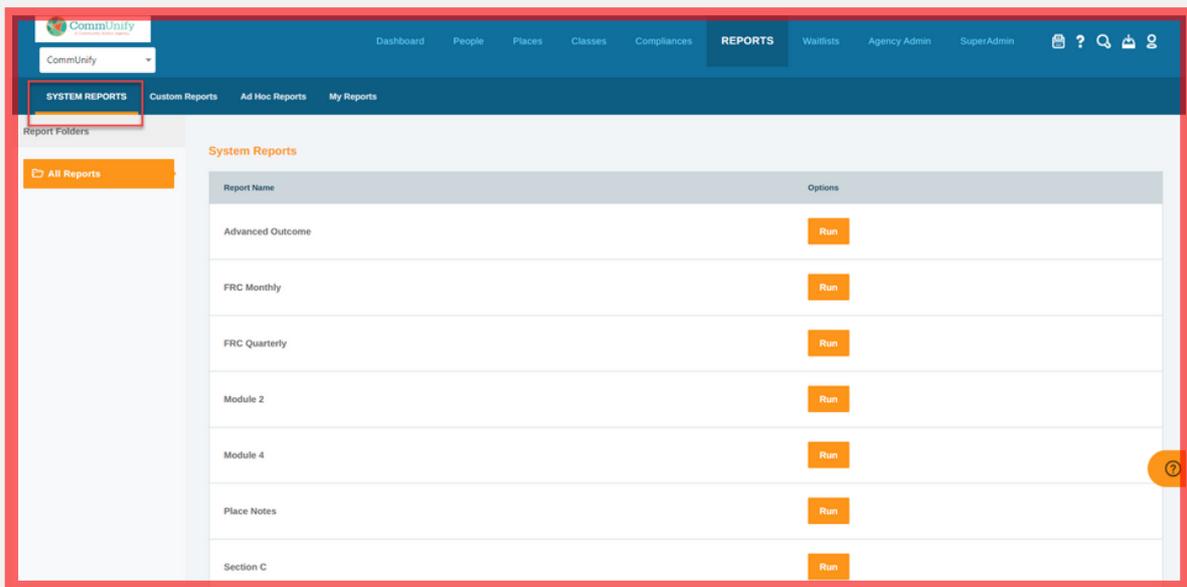


The Reports tab stores organization-level reports such as System Reports, Custom Reports spreadsheets, and statement-based Ad Hoc Reports.

Accessing the Reports tab in the system navigation bar is controlled by two role permissions.

SYSTEM NAVIGATION BAR

REPORTS TAB



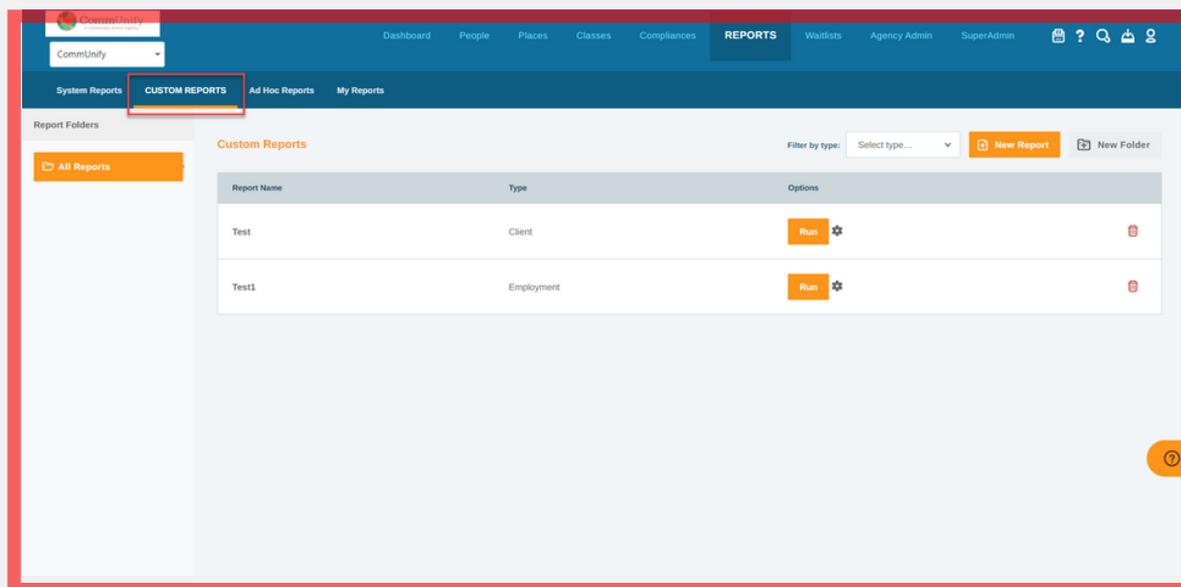
The screenshot displays the CommUnity Reports navigation bar. The 'REPORTS' tab is active, and the 'SYSTEM REPORTS' sub-tab is selected. The navigation bar includes links for Dashboard, People, Places, Classes, Compliances, Waitlists, Agency Admin, and SuperAdmin. The main content area shows a list of System Reports with columns for Report Name and Options (Run).

Report Name	Options
Advanced Outcome	Run
FRC Monthly	Run
FRC Quarterly	Run
Module 2	Run
Module 4	Run
Place Notes	Run
Section C	Run

System Reports are complex reports that the eLogic Genesis development team has created. Included in these reports are: Section C, Work Log, Place Notes, Module 4, and Advanced Outcome.

SYSTEM NAVIGATION BAR

REPORTS TAB

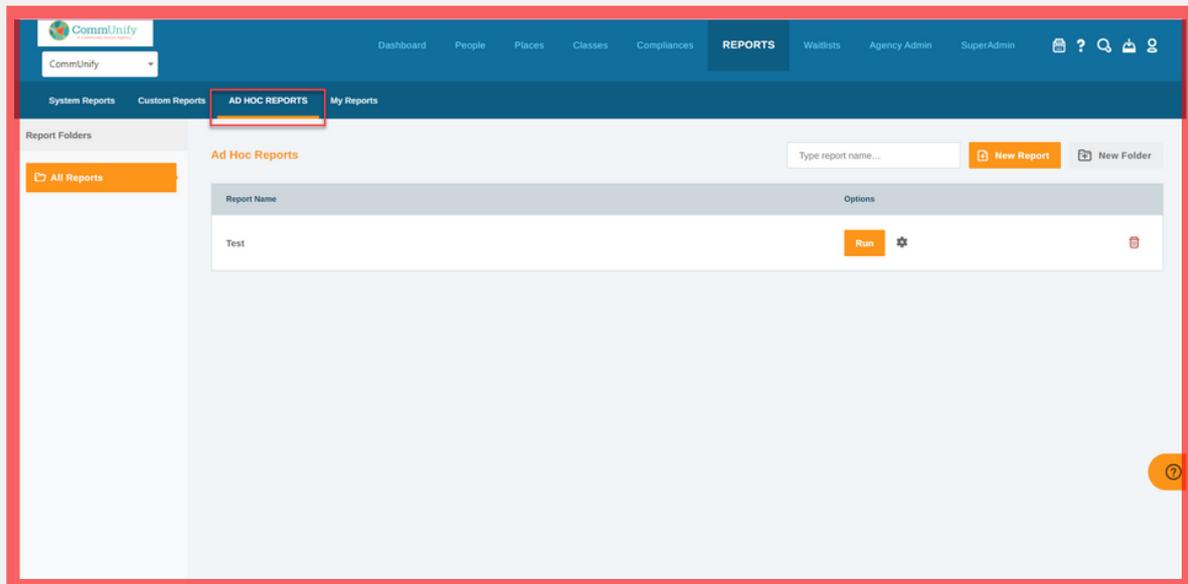


Custom Reports are spreadsheet reports that any user with the Reports Management Role Permission can generate. Custom Reports can be used to create reports on 15 distinct data categories.

The results of a Custom Report can be downloaded as a CSV file for use in another spreadsheet application, such as Microsoft Excel or Google Sheets.

SYSTEM NAVIGATION BAR

REPORTS TAB



Ad Hoc Reports are reports based on statements. The report builder inputs statements and assigns Rules to retrieve client records that meet the statements.

SYSTEM NAVIGATION BAR

REPORT TAB RESOURCES



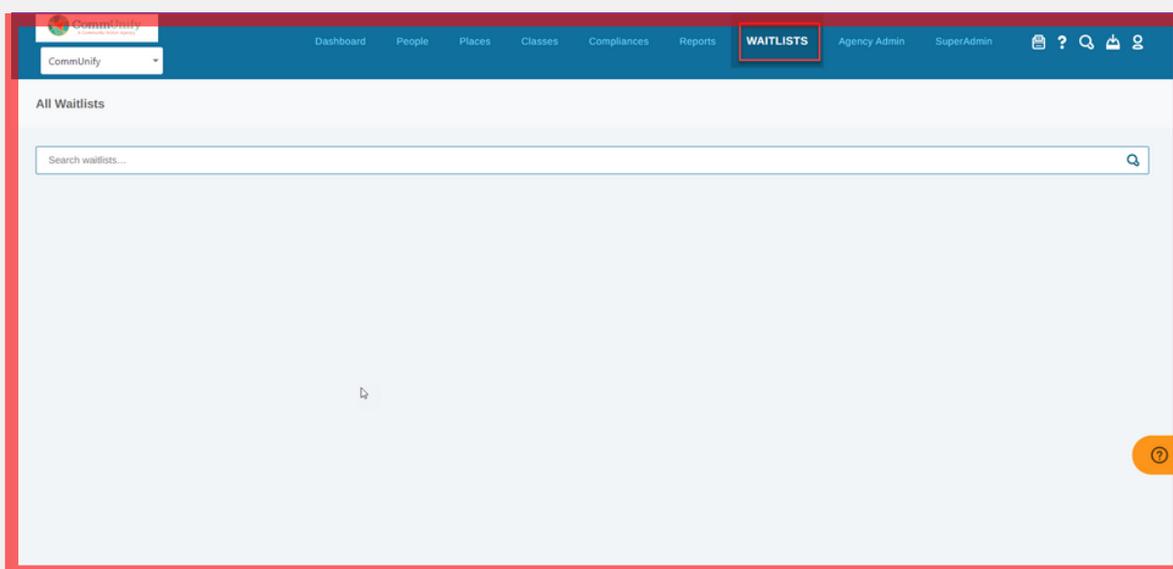
Read more about the Reports Tab here:

<https://ellogicgenesis.zendesk.com/hc/en-us/sections/360008679513-Reports>



SYSTEM NAVIGATION BAR

WAITLISTS TAB

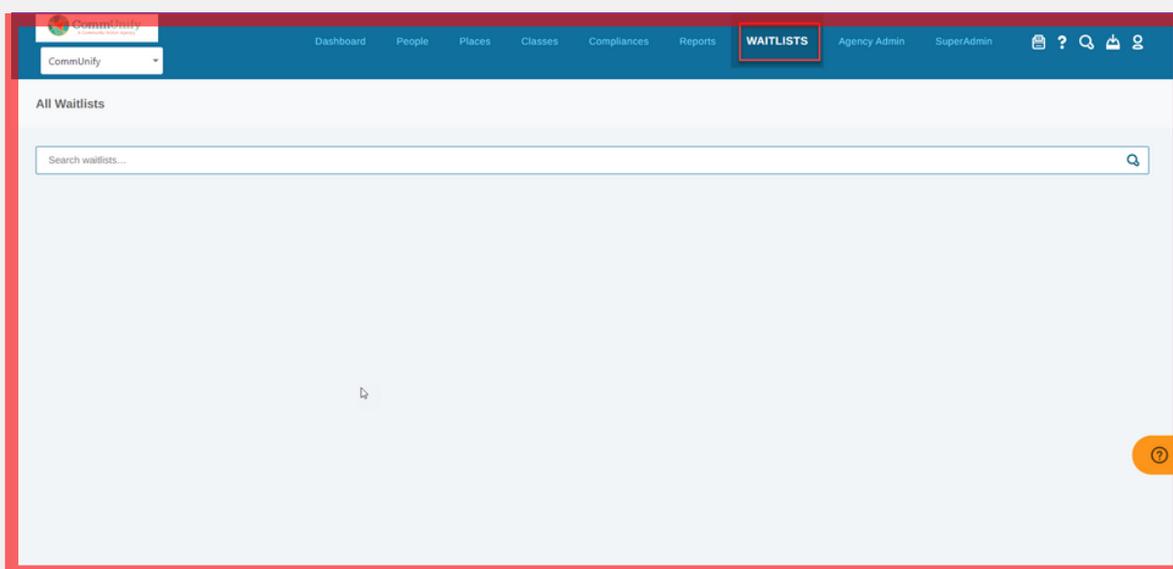


The Global Invitation Waitlist pertains specifically to the Client Portal for organizations that have distributed their Global Invitation Link to community members.

Managing the Global Invitation Waitlist involves the same stages as managing any other program's waitlist, but specific permission is required.

SYSTEM NAVIGATION BAR

WAITLISTS TAB

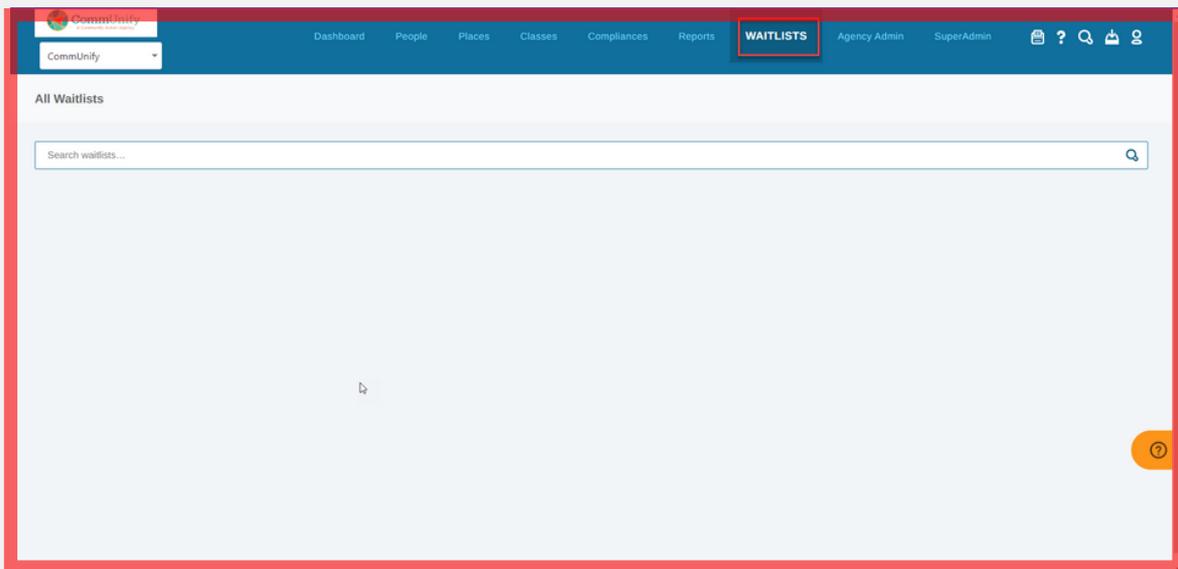


Waitlists organize new and returning clients who want to join your organization's programs. Navigators can add, delete, and accept clients from your organization's waitlists. eLogic Genesis provides three waitlists types:

Global Invitation, Agency Enrollment, and Program Enrollment Waitlists

SYSTEM NAVIGATION BAR

WAITLISTS TAB

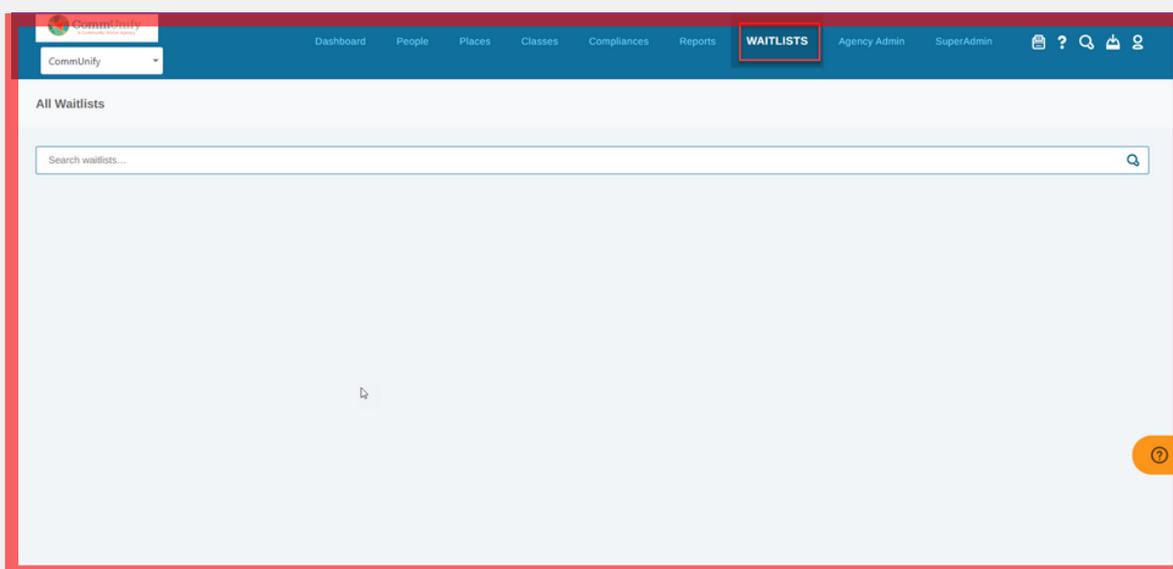


The Agency Enrollment Program Waitlist is a screening tool for new clients or clients who need to re-enroll to maintain their status within your organization.

Management of the Agency Enrollment Program Waitlist consists of the same stages as any other program waitlist.

SYSTEM NAVIGATION BAR

WAITLISTS TAB



Any program can have its waitlist for program enrollment, and Waitlists for Program Enrollment can be used in conjunction with or independently of the Client Portal.

Creating a waitlist for any or all of your organization's programs can assist with client enrollment organization and coordination.

SYSTEM NAVIGATION BAR

WAITLISTS RESOURCES



Read more about the Waitlists Tab here:

<https://ellogicgenesis.zendesk.com/hc/en-us/articles/360058607253>



SYSTEM NAVIGATION BAR ICONS



The Print icon appears to the right of the Waitlists tab. Click on the Print icon to print the current screen.

The Help Center icon appears as a question mark to the right of the Print icon. Click on the Help Center icon to visit the Help Center homepage.

The Global Search symbol (magnifying glass) is the third icon on the system navigation bar, and it is used for finding client or navigator records.

The Report Tray icon appears as a tray symbol. It will display a notification when it is time to run any Custom or Ad Hoc reports that have a reminder set.

SYSTEM NAVIGATION BAR ICON RESOURCES



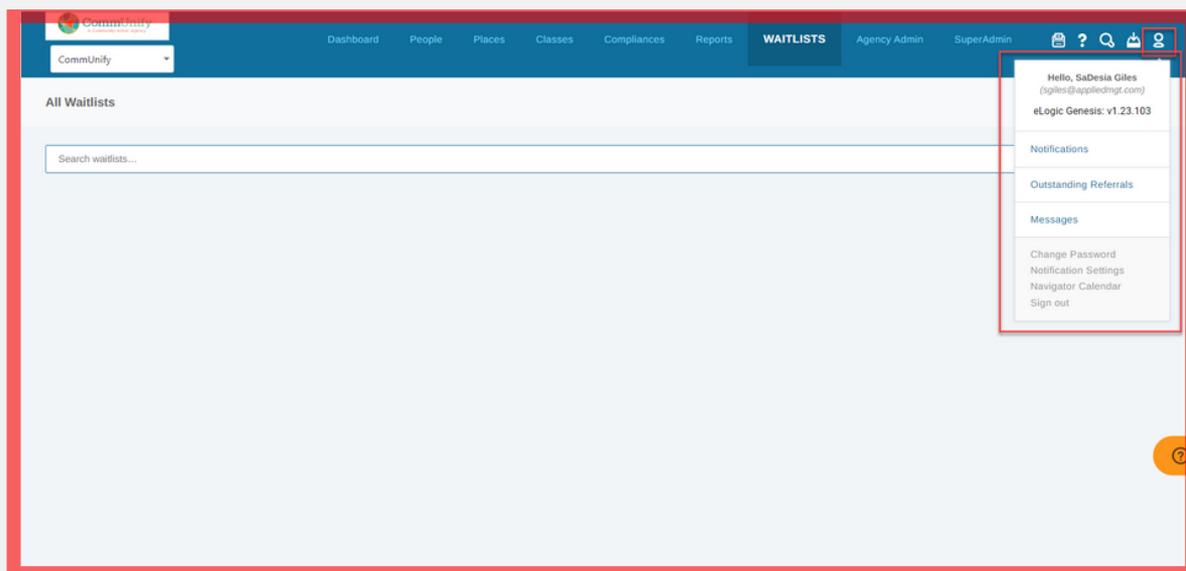
Read more about the Icons here:

<https://ellogicgenesis.zendesk.com/hc/en-us/articles/360049323034-System-Navigation-Bar-The-Basics>



SYSTEM NAVIGATION BAR

USER MENU



The User Menu appears as a user symbol to the right of the Reports Tray icon.

Click on the User Menu icon to view any notifications or outstanding referrals.

You'll also see a dropdown menu you can use to change your password, create a personal note, view your calendar or log out of eLogic Genesis.

SYSTEM NAVIGATION BAR

USER MENU RESOURCES



Read more about the User Menu feature here:

<https://ellogicgenesis.zendesk.com/hc/en-us/articles/360047772374>



eLogic Genesis

FAQS

1.

When it comes to the programs section when entering information, can we see other programs the clients are enrolled in?

Yes.

2.

Do only those with access to the specific program have access to the information?

Yes.

3.

Is there a section for notes that everyone can view, or are the notes only under the program section?

Any note entered will be available on the note landing page/screen (notes tab left sidebar). There are ways to lock down notes and add security parameters to specific notes.

4.

Is the Waitlists section programmatic or displayed by client?

It is mainly by program, but it depends on how you set it up. For example, you can create a waitlist for each program, and once a client is added to a waitlist, the liaison/program lead is responsible for accepting the client off the waitlist.

5.

Can we see all the programs a client is referred for to prevent double referrals?

Yes.

eLogic Genesis

FAQS Cont'd

6.

When you see the intake information, will you see other programs? Will the services be visible even though you can't access the file?

Yes.

7.

Will forms and reports be editable?

Yes.

8.

Are test reports available in the system to play around with?

Yes, through custom report building (located under the Reports Tab).



YOUR JOURNEY HAS BEGUN.

Let's Grow Together!