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eLogicGenesis® 

Training Guide

Presented by:



The Center for Applied
Management Practices

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eLogic Genesis

Welcome

Welcome to eLogic Genesis! We are delighted to have you as a user of our SAAS. 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 case 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 user support team can help you with any questions, concerns, or suggestions. We're committed to your success and look forward to being a trusted partner in your journey.



eLogicGenesis[®] 



LOGGING IN

Logging In

Step 1

eLogicGenesis

Login

Email

...

Password

... 🔍

Login

[Forgot password?](#)

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

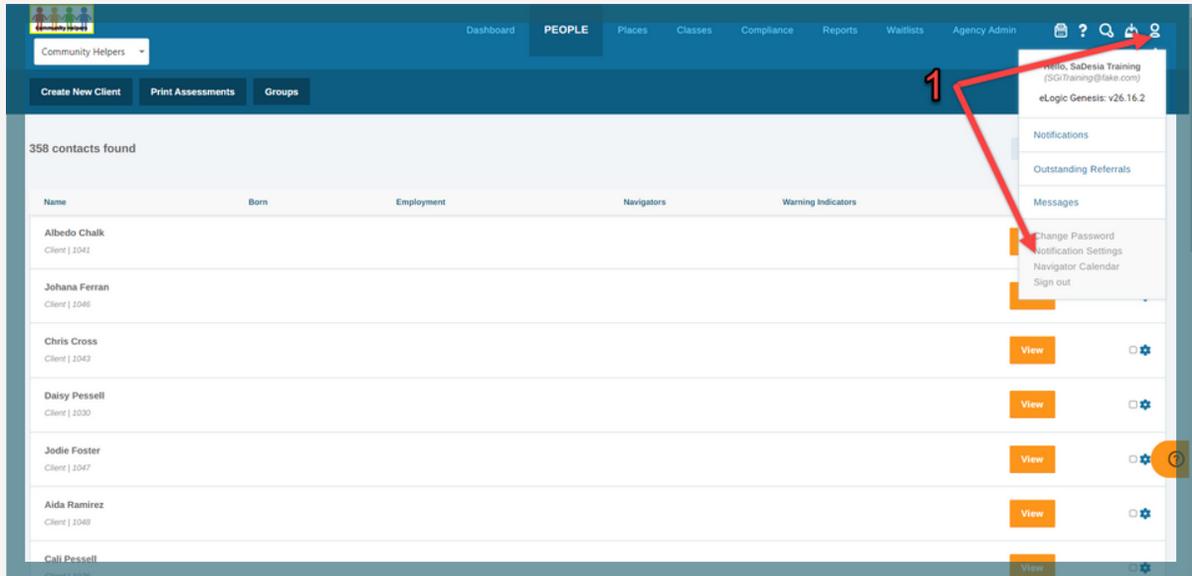
To access your Elogic Genesis account, please log in with your registered email and password.



USER SETTINGS

User Settings

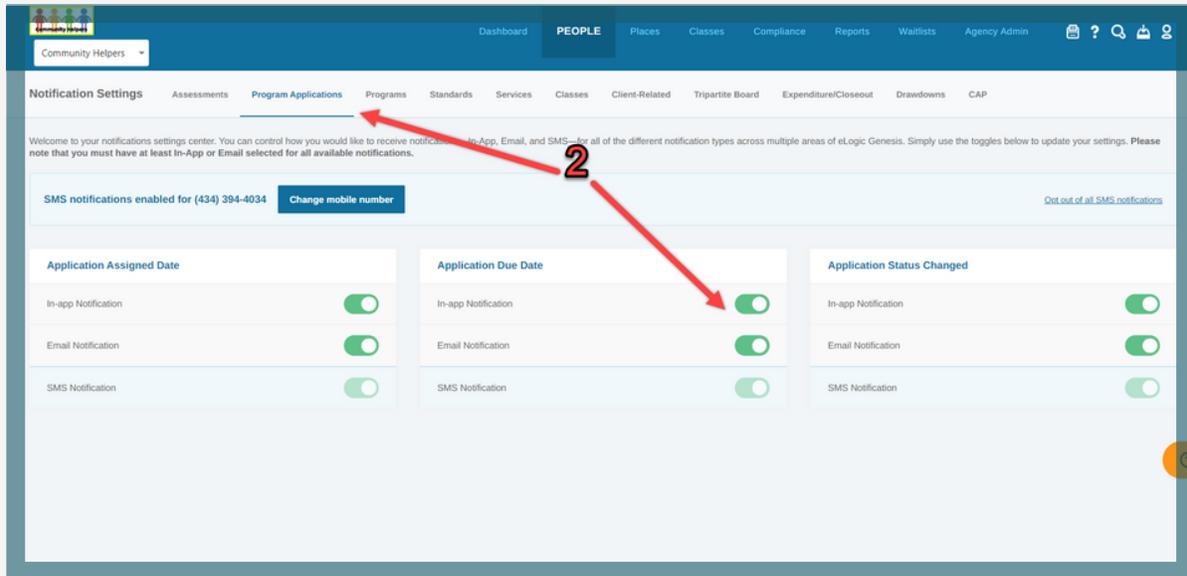
Step 1



Choose the user menu icon from the system navigation bar and click Notification Settings in the drop-down menu.

User Settings

Step 2



Toggle between the various notification boxes. By clicking the slide button for each notification option, choose your desired delivery method(s). With each choice, the system will automatically save.



**AGENCY
ADMIN:
PROGRAMS**

Agency Admin: Programs

Step 1

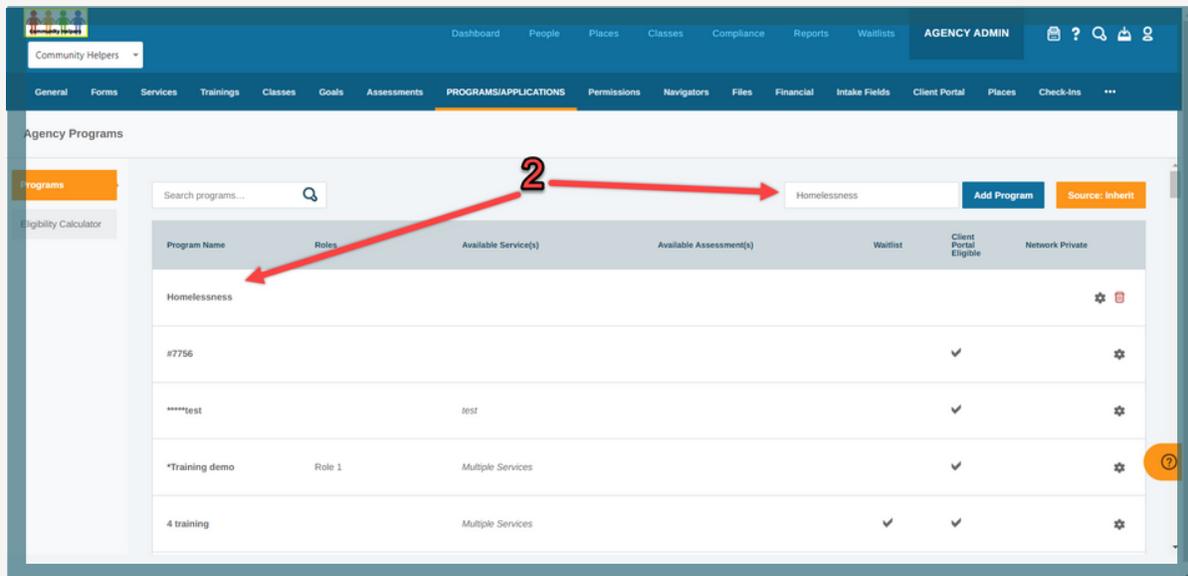
The screenshot shows the Agency Admin interface. The top navigation bar includes tabs for Dashboard, People, Places, Classes, Compliance, Reports, Waitlists, and AGENCY ADMIN. A red arrow points to the AGENCY ADMIN tab, and another red arrow points to the PROGRAMS/APPLICATIONS subtab. The main content area displays a table of programs with columns for Program Name, Roles, Available Service(s), Available Assessment(s), Waitlist, Client Portal Eligible, and Network Private. The table contains five rows of data.

Program Name	Roles	Available Service(s)	Available Assessment(s)	Waitlist	Client Portal Eligible	Network Private
#7756					✓	⚙️
****test		test			✓	⚙️
*Training demo	Role 1	Multiple Services			✓	⚙️
4 training		Multiple Services		✓	✓	⚙️
6 Training		Multiple Services			✓	⚙️

Choose the Agency Admin tab from the system navigation bar, then go to the Programs/Applications subtab.

Agency Admin: Programs

Step 2



Enter "Homelessness" in the textbox on the right and click Add Program.
The program will be shown below.

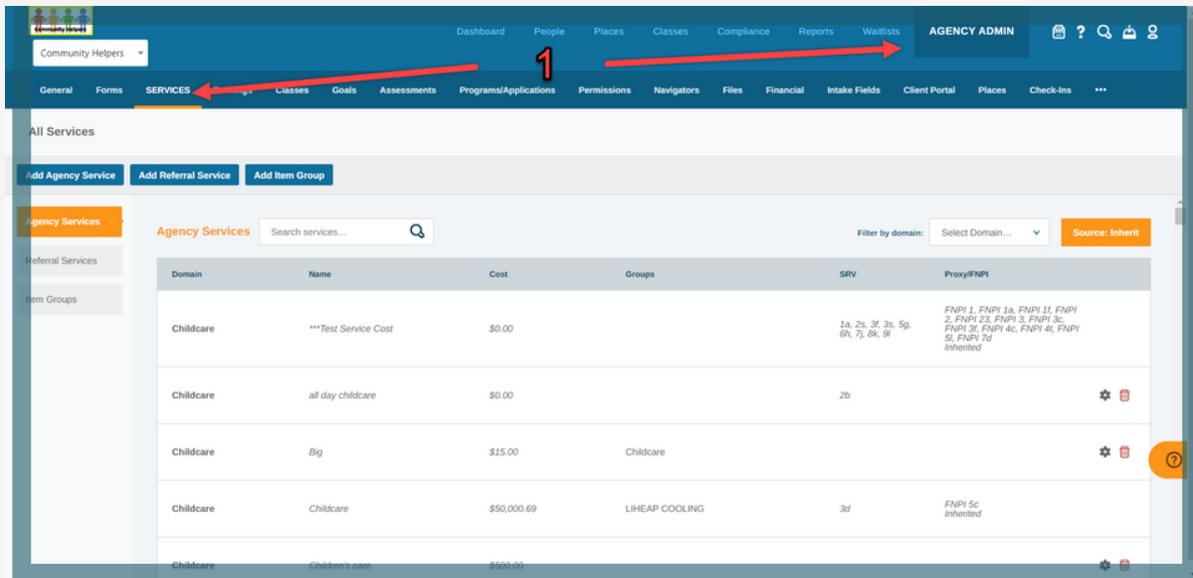


**AGENCY
ADMIN:
DIRECT &
REFERRAL
SERVICES**



Agency Admin: Direct Services

Step 1

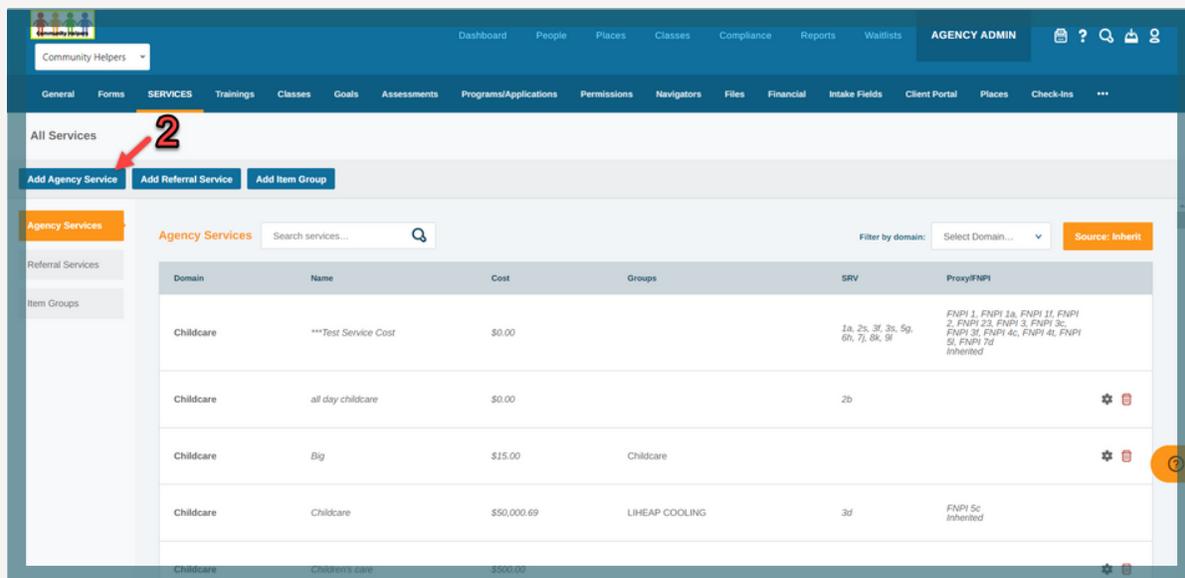


Direct Services:

Choose the Agency Admin tab from the system navigation bar, then go to the Services subtab.

Agency Admin: Direct Services

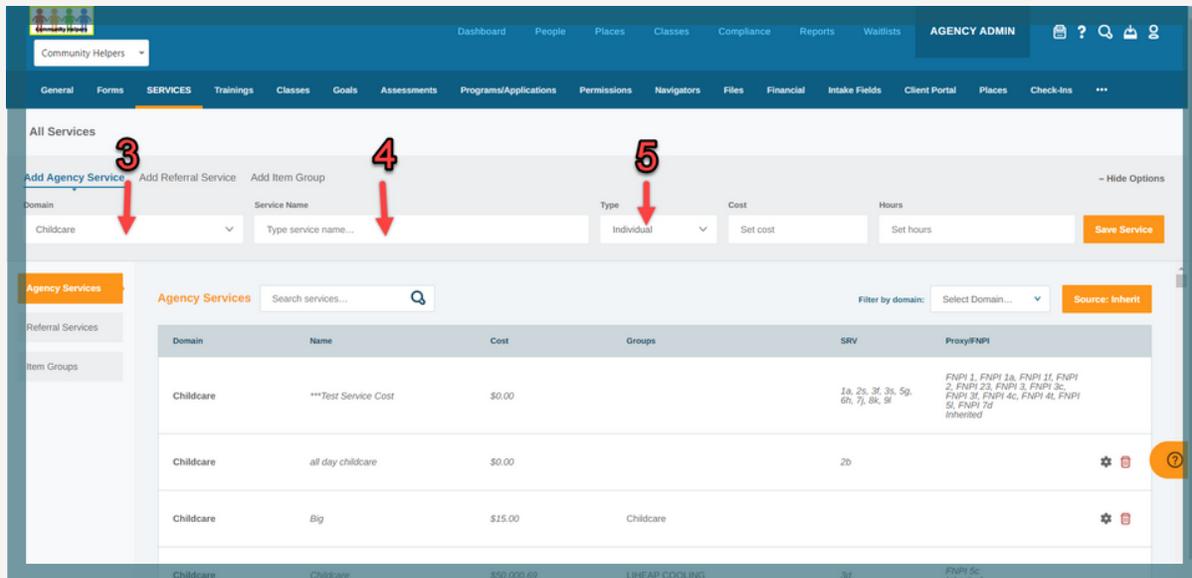
Step 2



Click Add Agency Service - the space below will enlarge.

Agency Admin: Direct Services

Steps 3-5



Choose Domain from the drop-down menu. In the textbox, type the name of the service (Warming Center, Supplies, Personal Care Item(s) or "Food Item(s)). Choose a service type from the drop-down menu.

Agency Admin: Direct Services

Steps 6-8

The screenshot shows the 'All Services' section in the Agency Admin interface. The 'Add Agency Service' form is active, with the following fields and values:

- Domain: Childcare
- Service Name: Type service name...
- Type: Individual
- Cost: Set cost (indicated by red arrow 6)
- Hours: Set hours (indicated by red arrow 7)
- Save Service (indicated by red arrow 8)

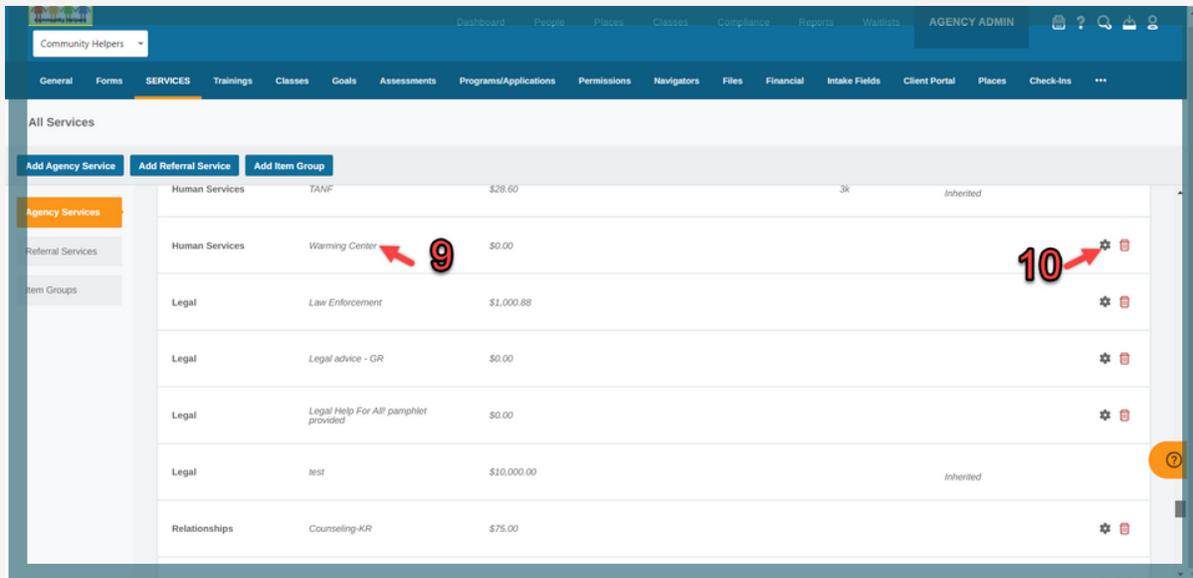
Below the form is a table of existing services:

Domain	Name	Cost	Groups	SRV	Proxy/FNPI
Childcare	***Test Service Cost	\$0.00		1a, 2a, 3f, 3i, 5g, 6h, 7j, 8k, 9f	FNPI 1, FNPI 1a, FNPI 1i, FNPI 2, FNPI 2i, FNPI 3, FNPI 3c, FNPI 3f, FNPI 4c, FNPI 4i, FNPI 5i, FNPI 7d Inherited
Childcare	all day childcare	\$0.00		2b	
Childcare	Big	\$15.00	Childcare		

Enter the service Cost to be set as the default (optional). Enter the service Hours to be set as the default (optional). Select Save Service.

Agency Admin: Direct Services

Steps 9-10



Locate the direct service you wish to view or edit.
Click the settings icon.

Agency Admin: Direct Services

Steps 11-12

Community Helpline

General Forms SERVICES Trainings Classes Goals Assessments Programs/Applications Permissions Navigators Files Financial Intake Fields Client Portal Places Check-Ins ...

Go to service: Human Services : Warming Center [← Back to all services](#)

Edit Service

Service Name
Warming Center

Domain
Human Services

Item Group
Select Item Group...

Type
Individual

Cost
0

Hours
0

Assign to Program(s)
Start typing program name...

Save Service

Add SRV
See the [complete list of SRVs](#) on pp. 57-64.

Add

Existing SRVs

Add FNPI ⓘ
See the [complete list of FNPIs](#) on pp. 49-56.

Add

Existing FNPIs

Quick Service
 Set as Quick Service

Funding Streams
 CSBG 2021
 CSBG 2022-2023 funding stream
 Natta Funding Stream testing 2023-2024
 test
 Test Funds

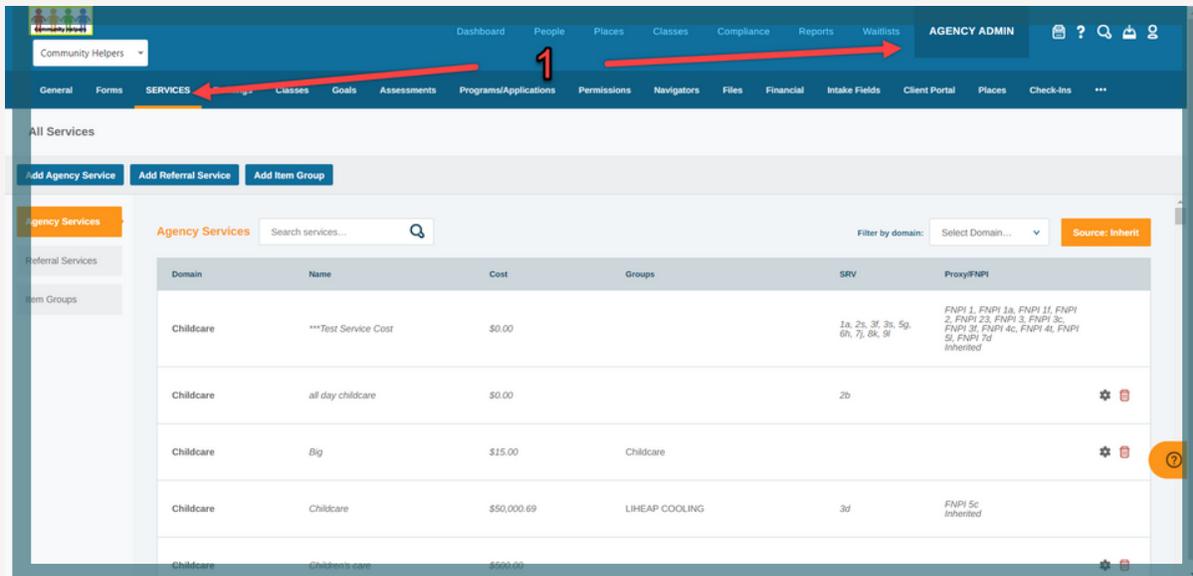
Set as Network private
Hide this service assignment in client records from other agencies for network-referred clients (recommended for services of a sensitive nature)

Click the checkbox next to Set as Quick Service.
Click Save Service.

Note: All direct services should be marked as “quick”.

Agency Admin: Referral Services

Step 1

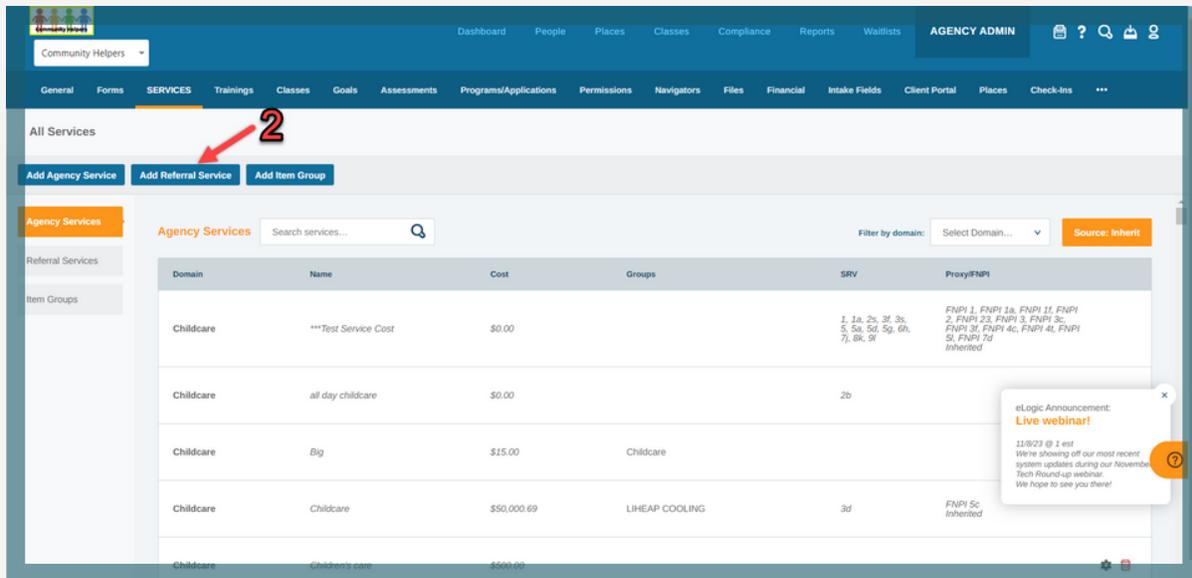


Referral Services:

Choose the Agency Admin tab from the system navigation bar, then go to the Services subtab.

Agency Admin: Referral Services

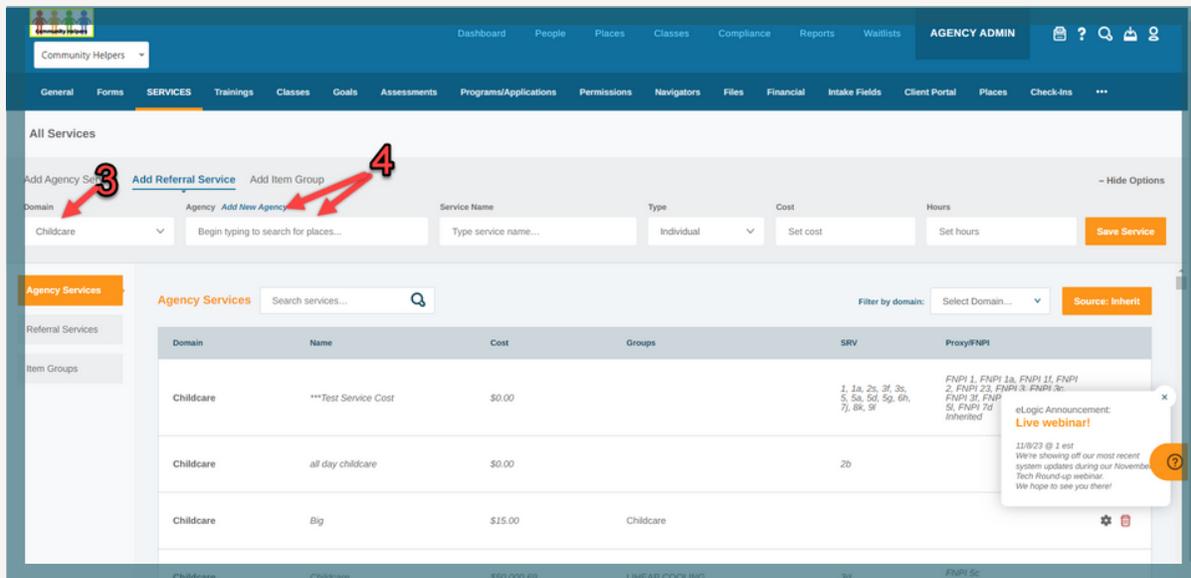
Step 2



Click Add Referral Service - the space below will enlarge.

Agency Admin: Referral Services

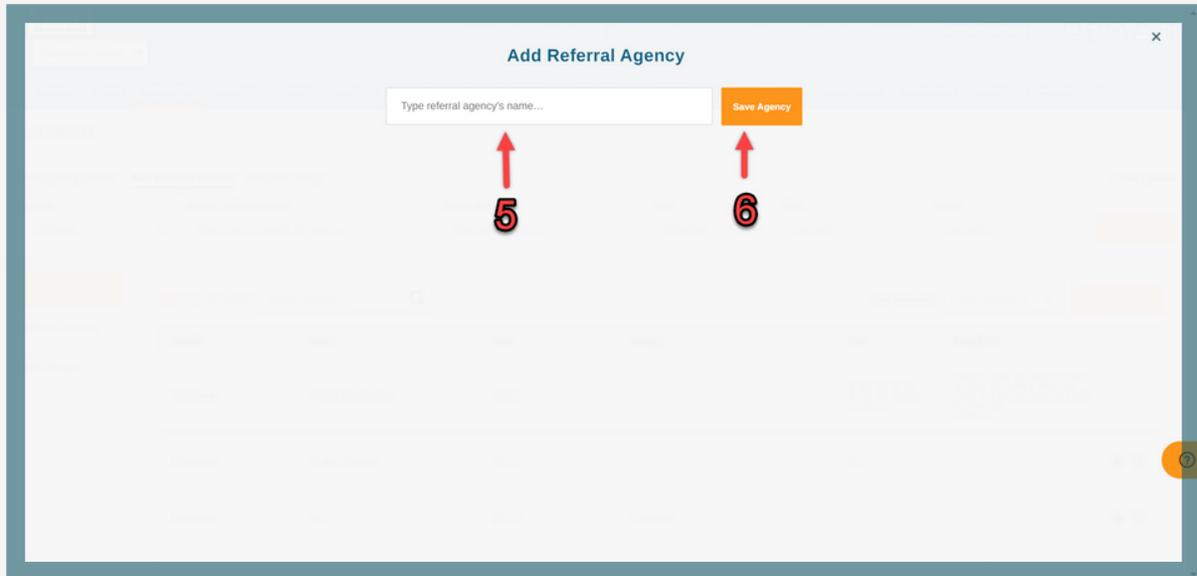
Steps 3-4



Choose Domain from the drop-down menu. Enter the Agency name in the textbox. If agency name appears in drop-down list below, you must click it to select. If agency name does not appear in drop-down list below, click Add New Agency above the Agency textbox - screen overlay will appear.

Agency Admin: Referral Services

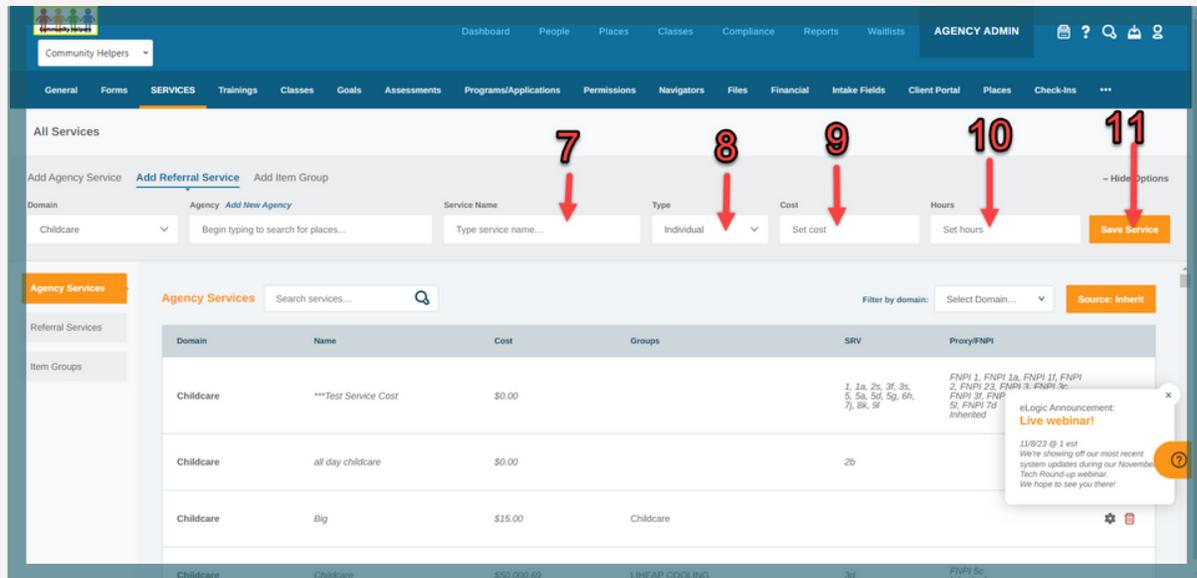
Steps 5-6



Enter Agency name and click Save Agency.

Agency Admin: Referral Services

Steps 7-11



Enter Service Name in textbox. Select service type from drop-down list. Enter service Cost to be assigned as default (optional). Enter service Hours to be assigned as default (optional). Click Save Service.

Agency Admin: Referral Services

Steps 12-13

The screenshot shows the 'All Services' page in the Agency Admin system. The 'Referral Services' section is active, displaying a table of services. The table has columns for Agency, Domain, Name, Cost, Groups, SRV, and ProxyFNPI. The first row is for 'Freddy Mac's Mac and Cheese' with Name 'food', Cost '\$0.00', and ProxyFNPI 'FNPI 1a, FNPI 2, FNPI 6, FNPI 6a Inherited'. A red arrow labeled '12' points to the 'Name' column, and another red arrow labeled '13' points to the settings icon in the 'ProxyFNPI' column.

Agency	Domain	Name	Cost	Groups	SRV	ProxyFNPI
Freddy Mac's Mac and Cheese	Human Services	food	\$0.00			FNPI 1a, FNPI 2, FNPI 6, FNPI 6a Inherited
Berta's Tech	Employment	Resume	\$0.00		1a, 2, 6, 6a	Inherited
Big J Tires	Transportation	New Car Tires	\$0.00			Inherited
Connecting Communities	Legal	Referral for Community Service Hours	\$0.00			Inherited

Locate the referral service you wish to view or edit.
Click the settings icon.

Agency Admin: Referral Services

Steps 14-15

The screenshot shows the 'Edit Service' form in the Agency Admin system. The form is titled 'Edit Service' and has a navigation bar at the top with tabs for General, Forms, SERVICES, Trainings, Classes, Goals, Assessments, Programs/Applications, Permissions, Navigators, Files, Financial, Intake Fields, Client Portal, Places, and Check-Ins. The 'Go to service:' field shows 'Freddy Mac's Mac and Cheese - H'. The form fields are: Service Name (food), Domain (Human Services), Item Group (Select Item Group...), Type (Individual), Cost (0), and Hours (0). The 'Assign to Program(s)' field is empty. A 'Save Service' button is highlighted with a red arrow and the number 15. On the right side, there are sections for 'Add SRV', 'Existing SRVs', 'Add FNPI', 'Existing FNPIs', and 'Funding Streams'. The 'Quick Service' checkbox is checked and highlighted with a red arrow and the number 14. The 'Set as Network private' checkbox is unchecked.

Click the checkbox next to Set as Quick Service.
Click Save Service.

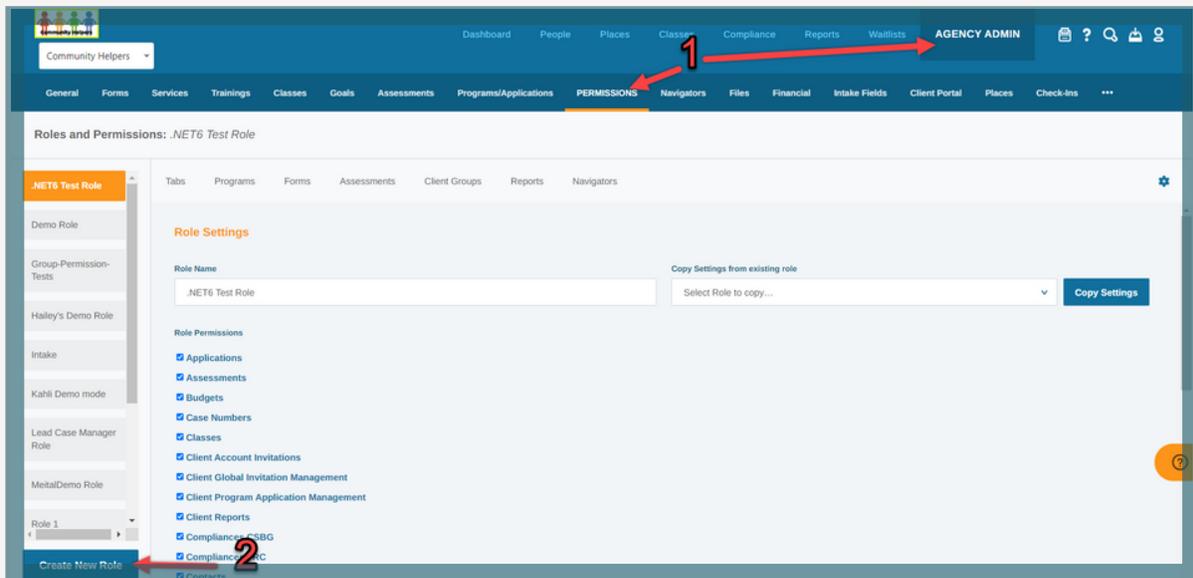
Note: All referral services should be marked as “quick.”



AGENCY ADMIN: PERMISSIONS

Agency Admin: Permissions

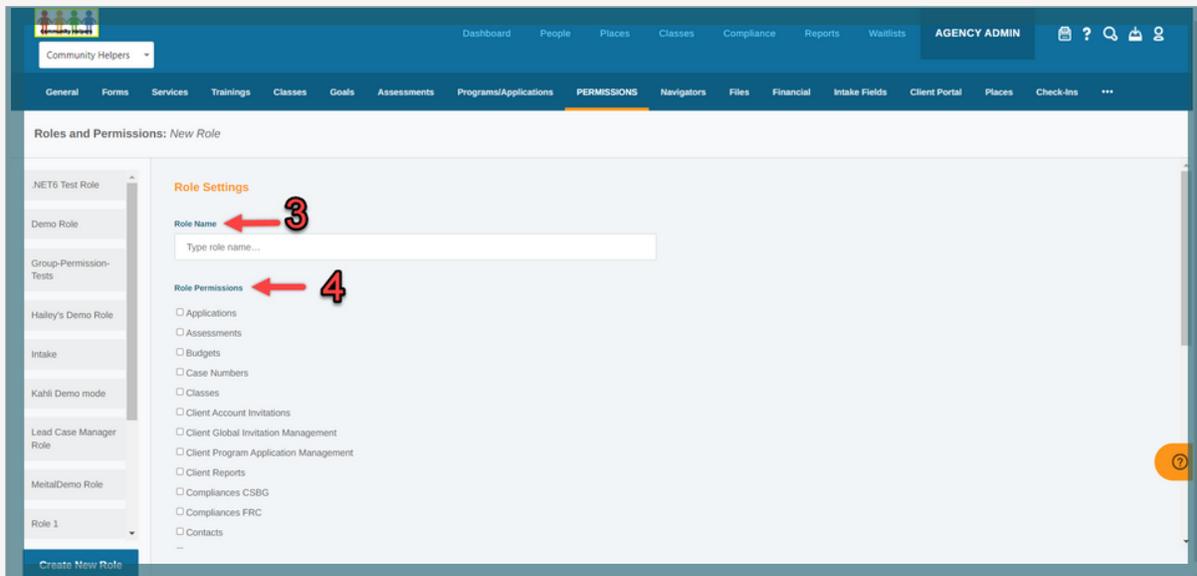
Step 1-2



Choose the Agency Admin tab from the system navigation bar, then go to the Permissions subtab. Scroll down and click the Create New Role button.

Agency Admin: Permissions

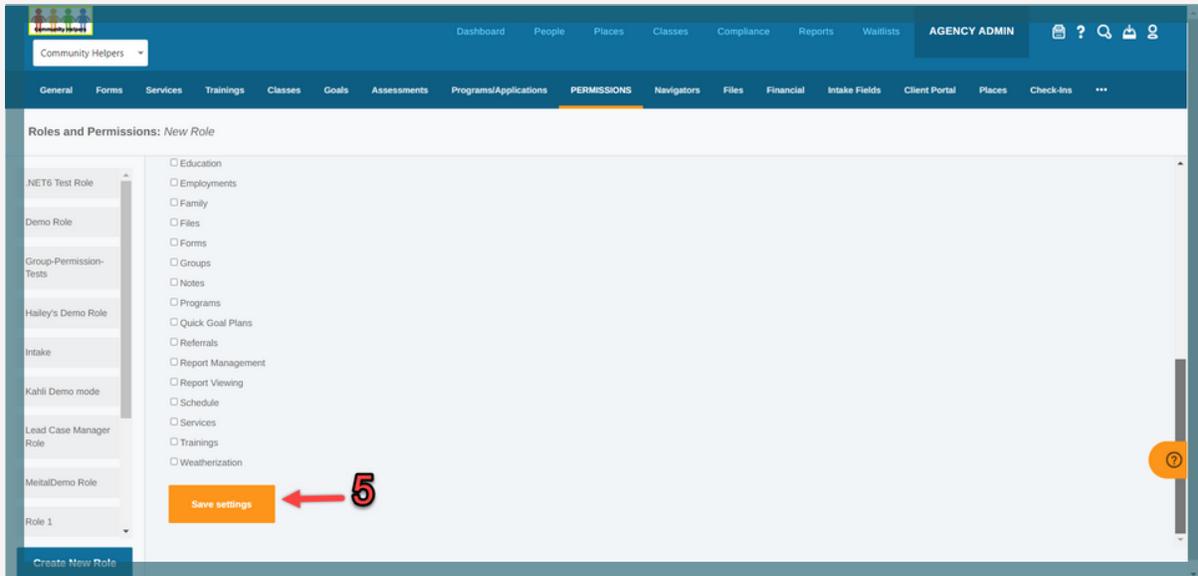
Steps 3-4



Enter the Role Name. Select the checkbox next to each role permission you want this role to have access to from the list.

Agency Admin: Permissions

Step 5



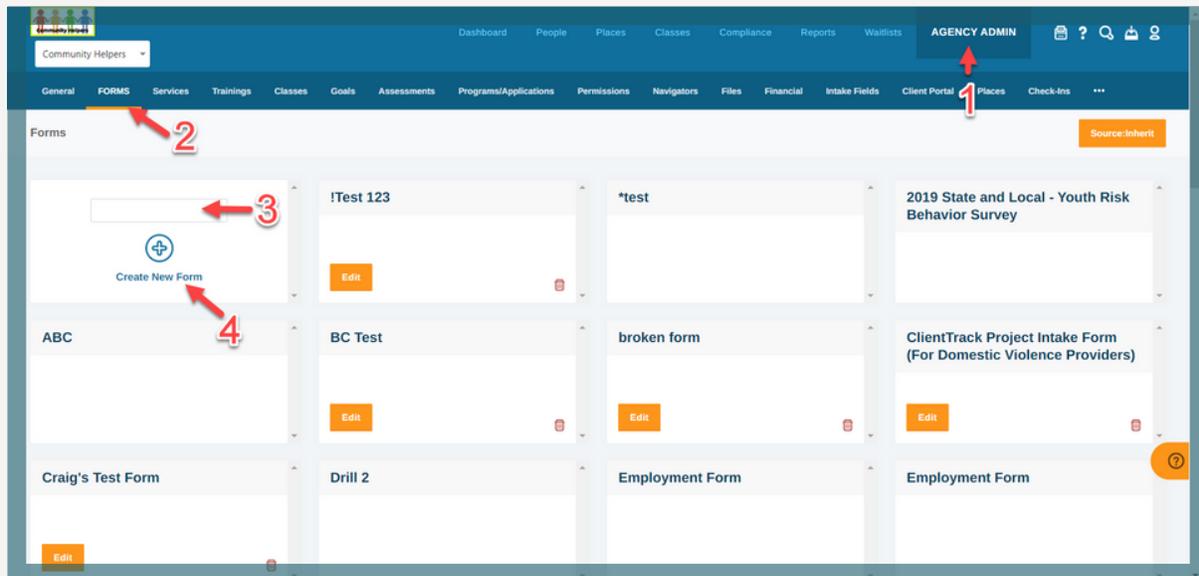
Scroll down and click Save settings.



AGENCY ADMIN: FORMS

Agency Admin: Forms

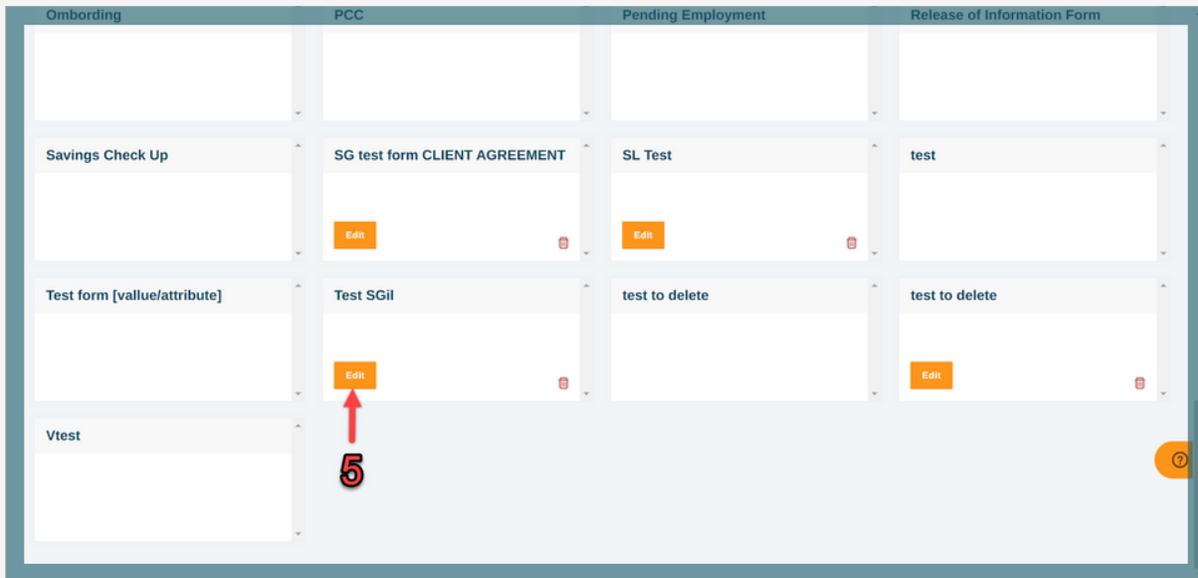
Steps 1-4



Click Agency Admin from the system navigation bar. Click Forms. Enter form name in the text field. Click Create New Form. The Form is created.

Agency Admin: Forms

Step 5



Locate the form you wish to enter or edit information and click Edit.

Agency Admin: Forms

Step 6

The screenshot displays the 'Create Form' interface in the Agency Admin system. The interface is divided into several sections:

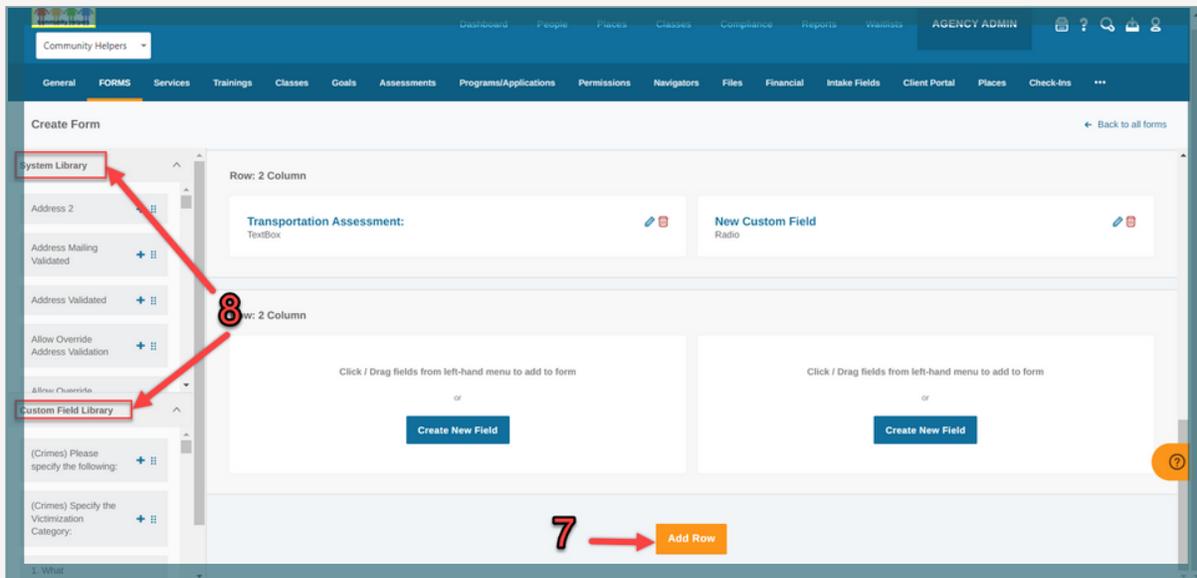
- System Library:** A list of pre-defined fields including 'Address 2', 'Address Mailing Validated', 'Address Validated', 'Allow Override Address Validation', and 'Allow Override'.
- Custom Field Library:** A list of custom fields including '(Crimes) Please specify the following:', '(Crimes) Specify the Victimization Category:', 'Demographic: Accessing Health', 'Demographic: Age', 'Demographic: Birth Date', and 'Demographic: Citizenship'.
- Form Configuration:** Fields for 'Form Title' (containing 'Test SGil'), 'Form Description' (containing 'Enter form description...'), and 'Default # of days to send reminder' (containing '0').

Red arrows and a circled number '6' highlight the 'Form Title', 'Form Description', and 'Default # of days to send reminder' fields, indicating the steps to be completed in this step.

Enter or edit Form Title, Form Description, and Default # of days to send reminder.

Agency Admin: Forms

Steps 7-8



Adding fields:

Click Add Row. From the System Library and Custom Field Library lists on the left, locate and click the field you wish to add to the form. Repeat as needed.

Agency Admin: Forms

Steps 9-14

The screenshot shows the 'Create Form' interface in the Agency Admin system. The interface is divided into a left-hand menu and a main workspace. The left-hand menu contains two sections: 'System Library' and 'Custom Field Library'. The 'System Library' includes items like 'Address 2', 'Address Mailing Validated', 'Address Validated', 'Allow Override Address Validation', and 'Allow Override'. The 'Custom Field Library' includes items like '(Crimes) Please specify the following:' and '(Crimes) Specify the Victimization Category:'. The main workspace is titled 'Row: 2 Column' and contains a form with three input fields: 'Field Type' (a dropdown menu), 'Field Name', and 'Field Description'. Below these fields is a 'Save' button. To the right of the form is a 'Create New Field' button. At the bottom of the workspace is an 'Add Row' button. Red arrows with numbers 9 through 14 point to these specific elements: 9 points to 'Add Row', 10 points to 'Create New Field', 11 points to 'Field Type', 12 points to 'Field Description', 13 points to 'Field Name', and 14 points to 'Save'.

Adding custom fields:

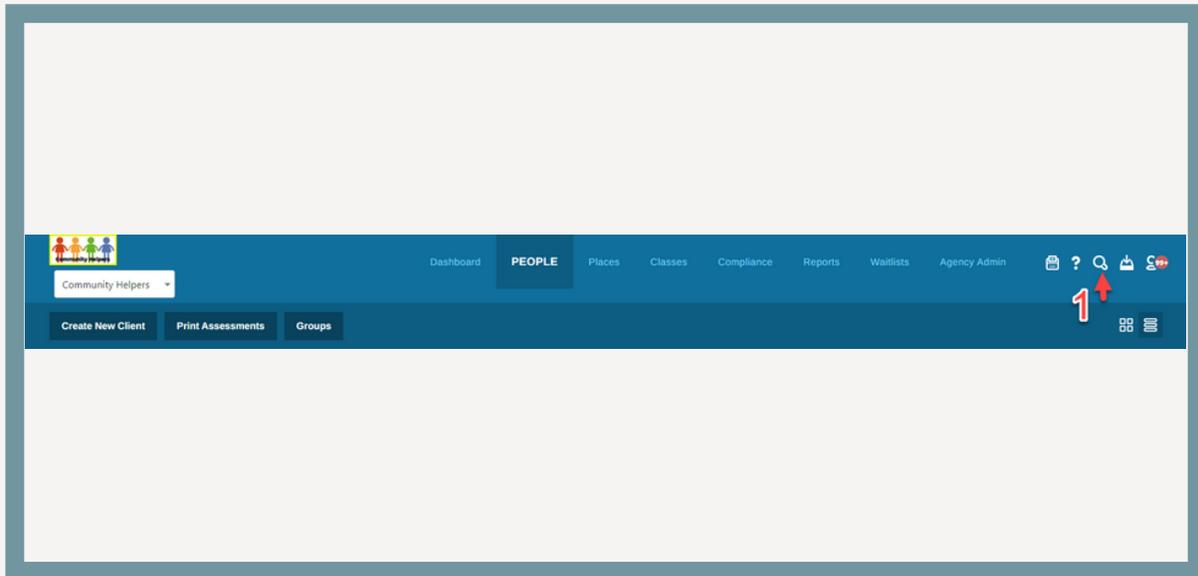
Click Add Row. Click Create New Field - a New Custom Field will be shown. Enter Field Name. Enter Field Description. Enter custom field Choices. Click Save.



TRACKING CLIENT DATA

Tracking Client Data

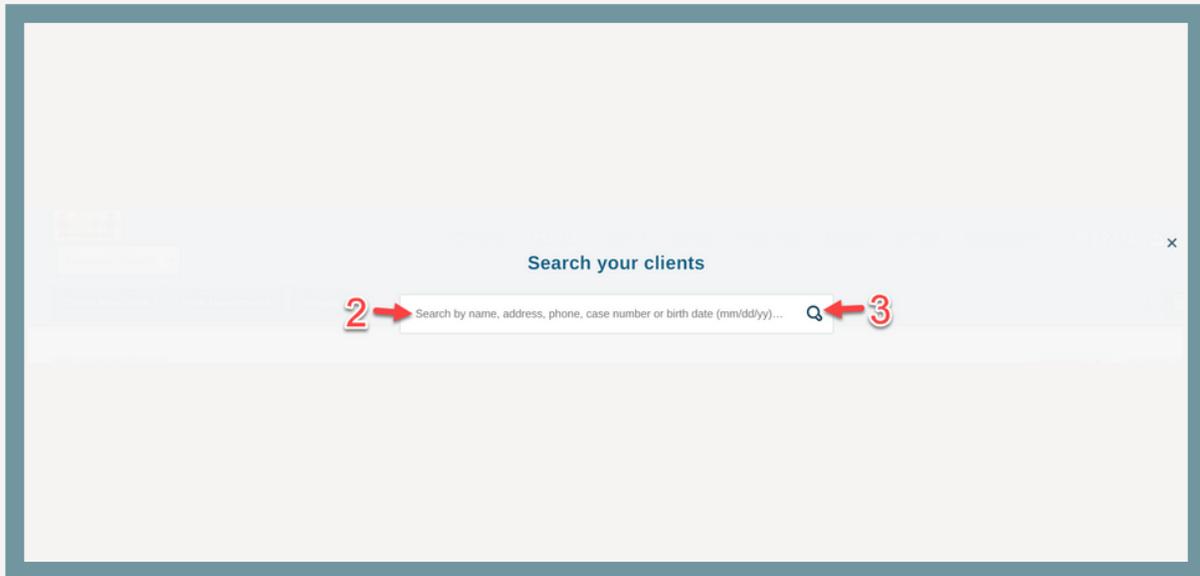
Step 1



Perform a quick search in the system to check if the client already exists. Locate the magnifying glass icon and click on it to open the search bar.

Tracking Client Data

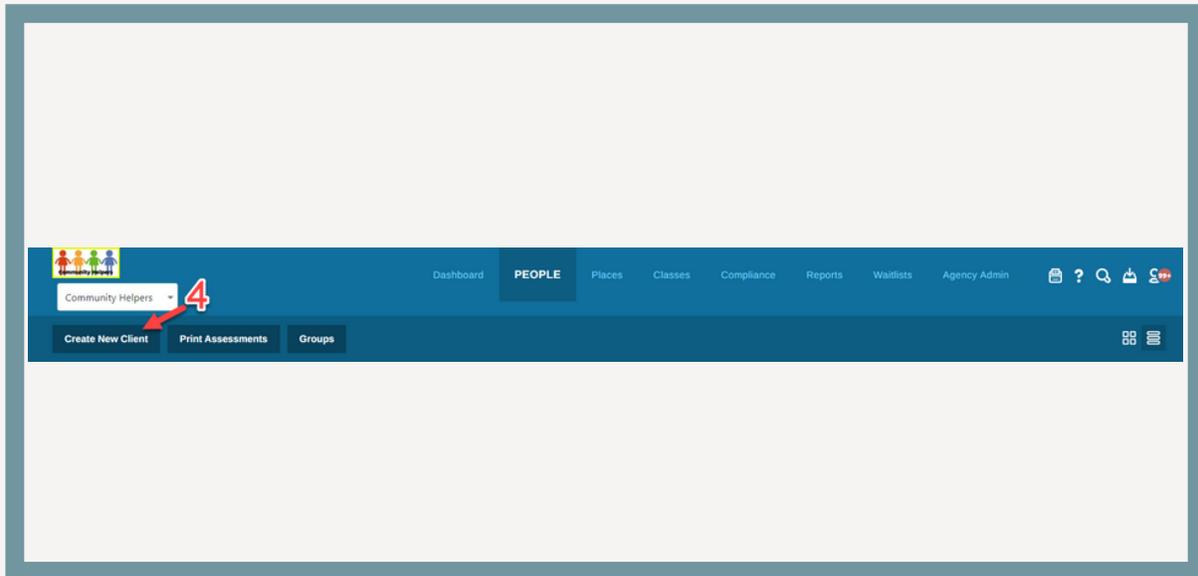
Steps 2-3



Click the search icon or press enter. If the client's name does not appear in the search results, they can be added as a new client.

Tracking Client Data

Step 4



Click the search icon or press enter. If the client's name does not appear in the search results, they can be added as a new client.

Tracking Client Data

Steps 5-8

The screenshot shows a web form titled "PEOPLE Create New Client". The form contains the following elements:

- Step 5:** Points to the "First Name" input field.
- Step 6:** Points to the "Type" dropdown menu, which currently shows "Client".
- Step 7:** Points to the "Add to existing family?" checkbox, which is checked.
- Step 8:** Points to the "Create Client" button.

Other visible elements include a "Last Name" input field, a "Search for HoH ..." input field, and a red "X" icon next to the "First Name" field.

Type the client's first and last name. Select the client type from the dropdown menu for clients, and select the employee type for volunteers and/or board members . If clients belong to an existing family: Check the "Add to existing family" box to search for and select the head of household's name. Click "Create Client".

Tracking Client Data

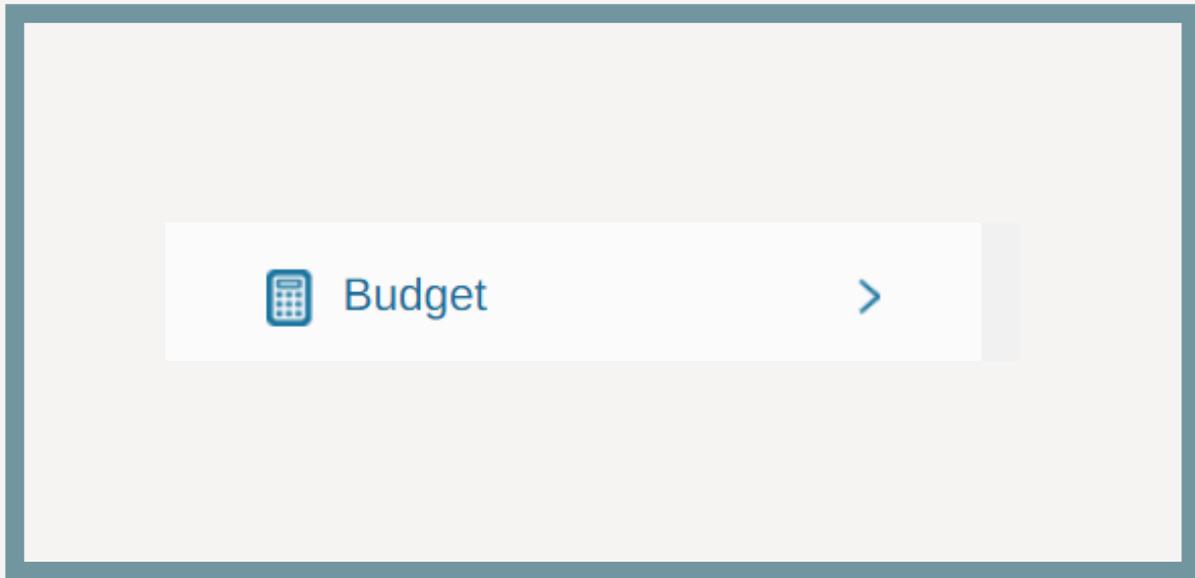
Step 9

The screenshot shows a web-based client intake form for a client named Brad Cooper. The form is titled 'Basic' and contains several sections of information. The 'Basic' section includes fields for Title, Middle Name, Suffix, Other Name, Secondary Email, Mobile Phone, and Message Phone. The 'Personal Information' section includes fields for First Name, Last Name, Display Name, Email, Home Phone, Work Phone, and Birth Date. A red arrow points to the First Name field, which contains the text 'Brad'. A red circle with the number '9' is next to the arrow, indicating the step number. The form is part of a larger system with a navigation menu at the top and a sidebar on the left.

After creating the client, you will be taken to the intake page. Enter name, DOB, phone number, referral source, race, and gender. The system saves automatically as you go.

Tracking Client Data

Step 10



Click the "Budget" subtab.

Tracking Client Data

Step 11

Community Helpers

Dashboard PEOPLE Places Classes Compliance Reports Waitlists Agency Admin

Intake Goal Plans Programs/Apps Employment Education Trainings Services Weatherization Forms

Brad Cooper
Client | 1320

Change

COVID-19 Affected

Created 12/21/2022 10:40 AM

Interactions

Contacts

Notes

Schedule

Budget

Assessments

Files

INCOME Expenses

Income Options

No Sources of Income Refused to Report Income Exclude From Household Income

Remaining - \$0.00 monthly, \$0.00 annually

Save changes

Budget Totals

Client Family

Income Types

Gross Income:	\$0.00
Net Income:	\$0.00
Employment Wage:	\$0.00
Non-Cash Benefits:	\$0.00
Daily Income:	\$0.00
Weekly Income:	\$0.00
Monthly Income:	\$0.00

PoP Types

Expense Types

With non-cash benefits

Select the applicable check-boxes:

- No Sources of Income - select if client doesn't have any sources of income
- Refused to Report Income - select if client refused to report income
- Exclude From Household Income - select if client income should be excluded from Family budget totals

Tracking Client Data

Steps 12-13

The screenshot displays the 'Income Options' section for a client named Brad Cooper. The interface includes a navigation menu at the top with options like 'Dashboard', 'PEOPLE', 'Places', 'Classes', 'Compliance', 'Reports', 'Waitlists', and 'Agency Admin'. The main content area is divided into 'Income Options' and 'Budget Totals'. The 'Income Options' section has a 'Remaining' status of '\$0.00 monthly, \$0.00 annually' and a table with columns for 'Income Type', 'Amount', 'Frequency', and 'Income Identified'. A red arrow labeled '13' points to the 'Income Identified' dropdown menu, and another red arrow labeled '12' points to the '\$ Add income source' link. The 'Budget Totals' section on the right shows various income and expense categories with their respective values.

Income Type	Amount	Frequency	Income Identified
my personal income	\$ 0.000	Daily	<input type="checkbox"/>
nat1	\$ Add income source		<input type="checkbox"/>

Total Monthly Income: \$0.00

Save changes

Click the Income Group to expand - all income types in that group will be visible. Locate the Income Type you wish to enter and click "\$ Add income source" to enter the amount.

Tracking Client Data

Steps 14-15

The screenshot displays the 'Income Options' section for a client named Brad Cooper. The interface includes a sidebar with navigation options, a top navigation bar, and a 'Budget Totals' panel on the right. The 'Income Options' section features a table with columns for 'Income Type', 'Amount', and 'Frequency'. A red arrow labeled '14' points to the 'Frequency' dropdown menu, which is currently set to 'Daily'. Another red arrow labeled '15' points to the 'Save changes' button at the bottom of the form. The 'Budget Totals' panel on the right shows various income and expense categories with their respective values.

Income Type	Amount	Frequency	Income Identified
my personal income	\$ 0.000	Daily	<input type="checkbox"/>
nata1	\$ Add income source		<input type="checkbox"/>

Total Monthly Income: \$0.00

Save changes

Select Frequency from the drop-down list

- Daily
- Weekly
- Bi-weekly
- Monthly
- Yearly

Click Save changes.

Tracking Client Data

Steps 16-19

The screenshot shows a software interface for tracking client data. The main navigation bar includes 'Dashboard', 'PEOPLE', 'Places', 'Classes', 'Compliance', 'Reports', 'Waitlists', and 'Agency Admin'. The 'PEOPLE' subtab is active, and the 'FORMS' subtab is selected, indicated by a red arrow and the number 16. The client profile for 'Brad Cooper' is visible on the left, with a 'COVID-19 Affected' status. The 'Forms' section shows a form titled 'Test SGil' with a dropdown menu (indicated by a red arrow and the number 18) and a 'Create Form' button (indicated by a red arrow and the number 19). A table below shows a list of forms with columns for Name, Created On, Finalized?, Finalize Date, Signature, and Created By.

Name	Created On	Finalized?	Finalize Date	Signature	Created By
New Client	08/30/2023	Yes	08/30/2023	SG	SaDesia Training
Test SGil	07/24/2023	Yes	08/22/2023	SG	SaDesia Giles
Test SGil	08/23/2023	No	n/a		SaDesia Training

Click the Form subtab. Click "Add Form". Select referral form from the dropdown. Click "Create Form". Form opens.

Tracking Client Data

Steps 20-22

The screenshot shows a software interface for tracking client data. The main content area displays a form for a client named Brad Cooper. The form includes the following fields:

- Registered State:
- License Plate Number:
- Insurance Company:
- Insurance Renewal Date:
- License Number:
- License Expiration Date:

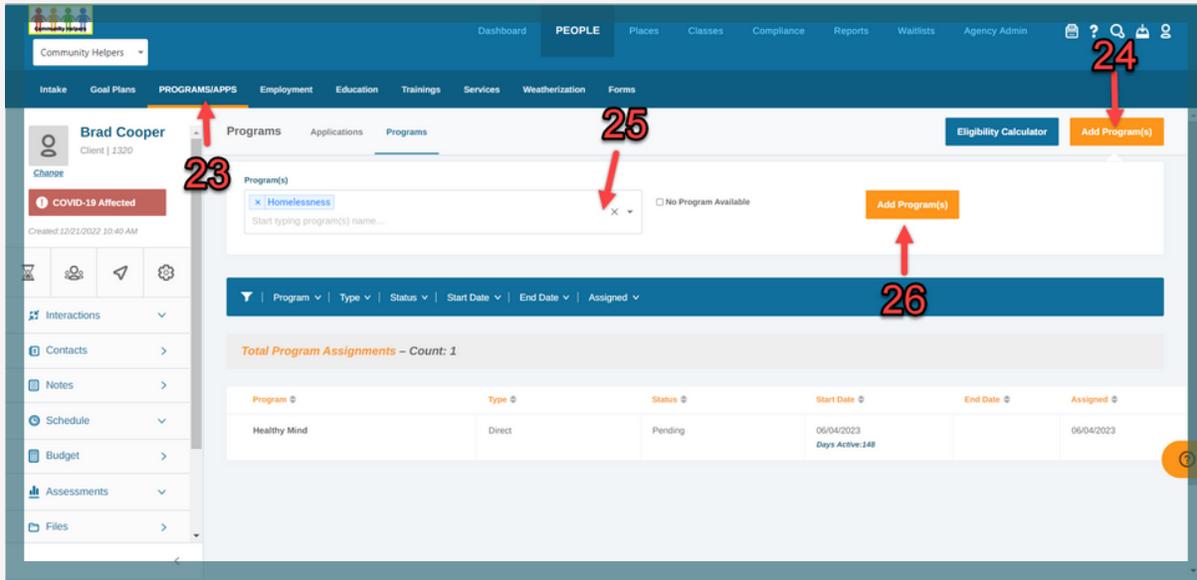
Red arrows and numbers indicate the steps to complete the form:

- Step 20: Points to the Insurance Renewal Date field.
- Step 21: Points to the Signature field.
- Step 22: Points to the Finalize button.

Fill in all fields. Enter signature and date. Click "Finalize".

Tracking Client Data

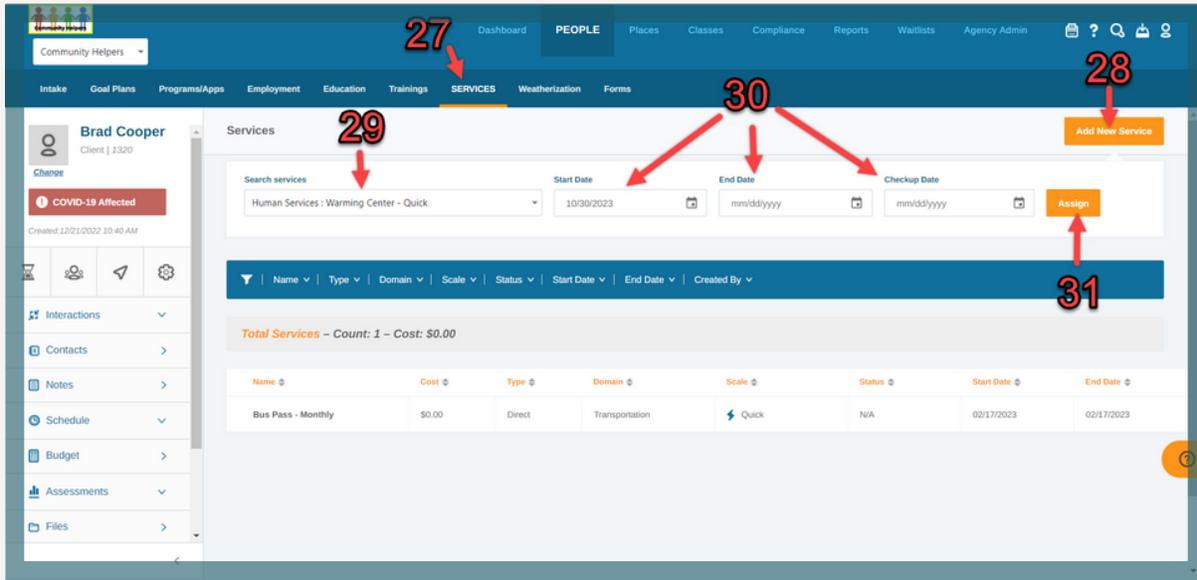
Steps 23-26



Select the Programs tab. Click Add Program(s) in the top right corner. Click the Program(s) drop-down and select "Homelessness". Click Add Program(s). The program is added to the table below.

Tracking Client Data

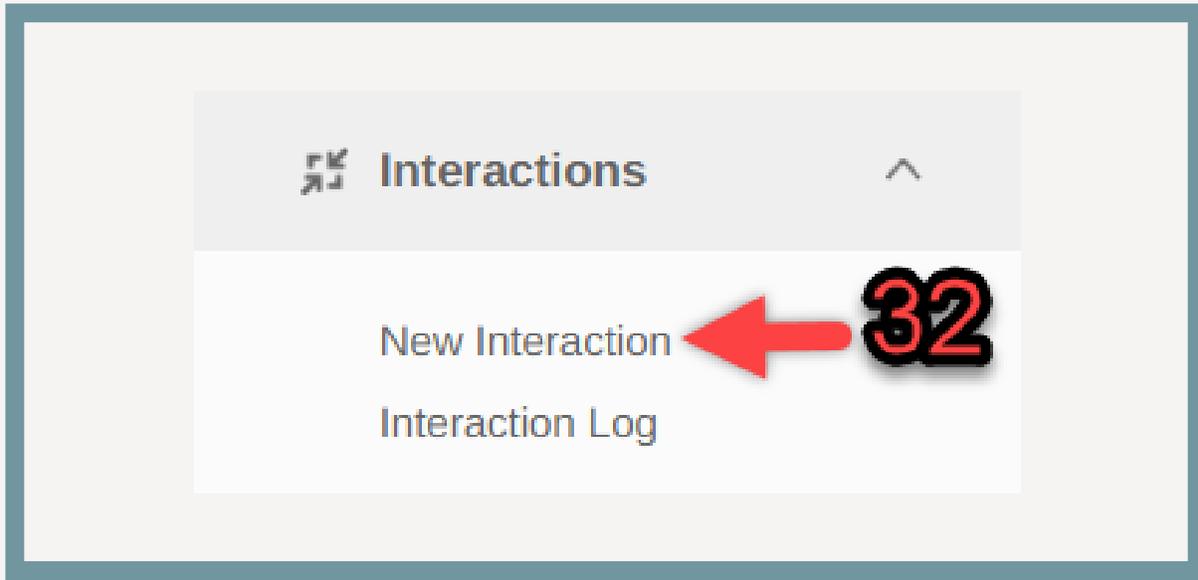
Steps 27-31



Click "Services" tab. Click "Add New Service". Refer to your in-house service list and select the appropriate services. Or select referral service. Set start, end , and checkup dates. Click "Assign". Service will be added to table below.

Tracking Client Data

Step 32



Click on the Interactions subtab and click "New Interaction". A screen overlay will appear.

Tracking Client Data

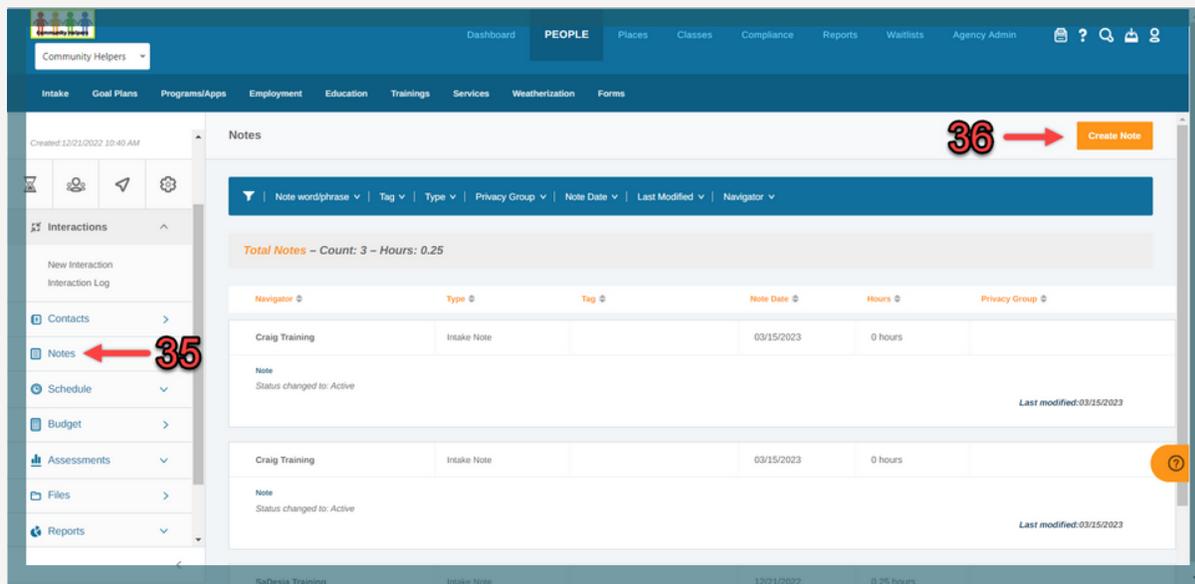
Steps 33-35

The screenshot shows a web form titled "New Interaction: Brad Cooper". A red box highlights the "Interaction Type" section, which includes radio buttons for "Myself" (selected) and "Brad", and buttons for "Appointment", "Email", "Flyer/Mailer", "Mail", "No Show", "Other", "Phone", "Reschedule", "Text", "Video Chat", and "Walk-in". The "Date of interaction" is set to 10/27/2023 and "Hours" is 0. Below the form, three numbered steps are indicated with red arrows: 33 points to the "Email" button, 35 points to the "Create Intake Note?" button, and 36 points to the "Save Interaction" button.

Fill in information. Add note (optional). Click "Save Interaction".

Tracking Client Data

Steps 36-37



Click "Notes" in left sidebar. Click "Create Note".
Overlay appears.

Tracking Client Data

Steps 38-39

The screenshot shows a web application window titled "Add Intake Note: Brad Cooper". The form contains the following fields:

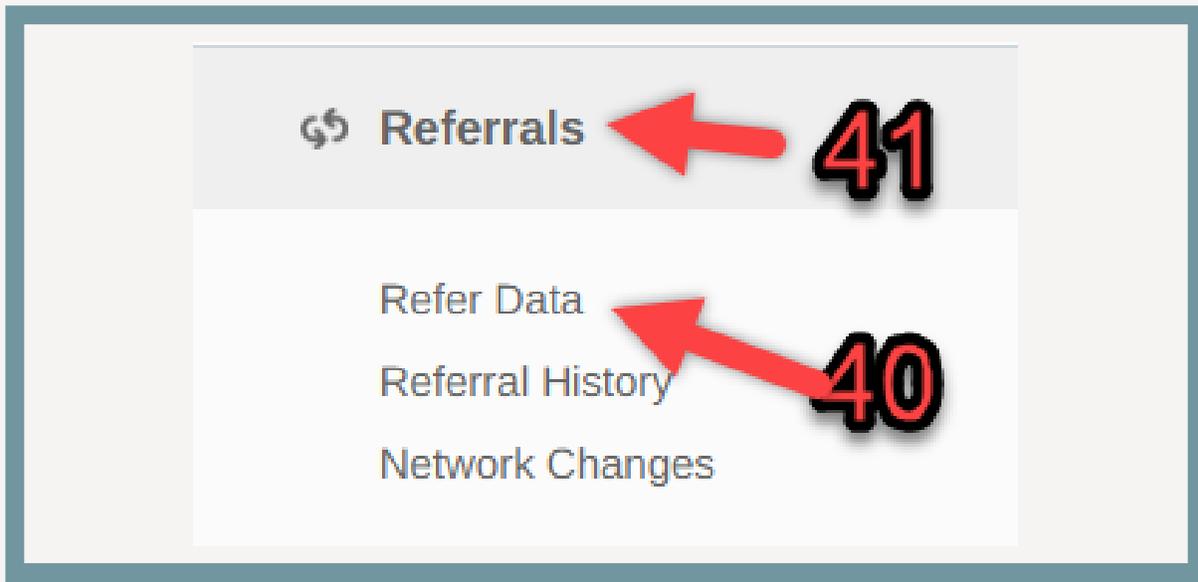
- Date Created:** A date picker showing "10/27/2023".
- Hours:** A text input field containing "0.25".
- Privacy Group:** A dropdown menu with "[None Selected]" selected.
- Tags:** A search input field with the placeholder text "Begin typing to search...".
- Note:** A large text area for entering the note content.
- Add Note:** An orange button at the bottom right of the form.

Step 38 is indicated by a red arrow pointing to the "Date Created" field. Step 39 is indicated by a red arrow pointing to the "Add Note" button.

Enter the date created, hours, privacy group, note tags, and note text. Click "Add Note". The Note will be added to the table.

Tracking Client Data

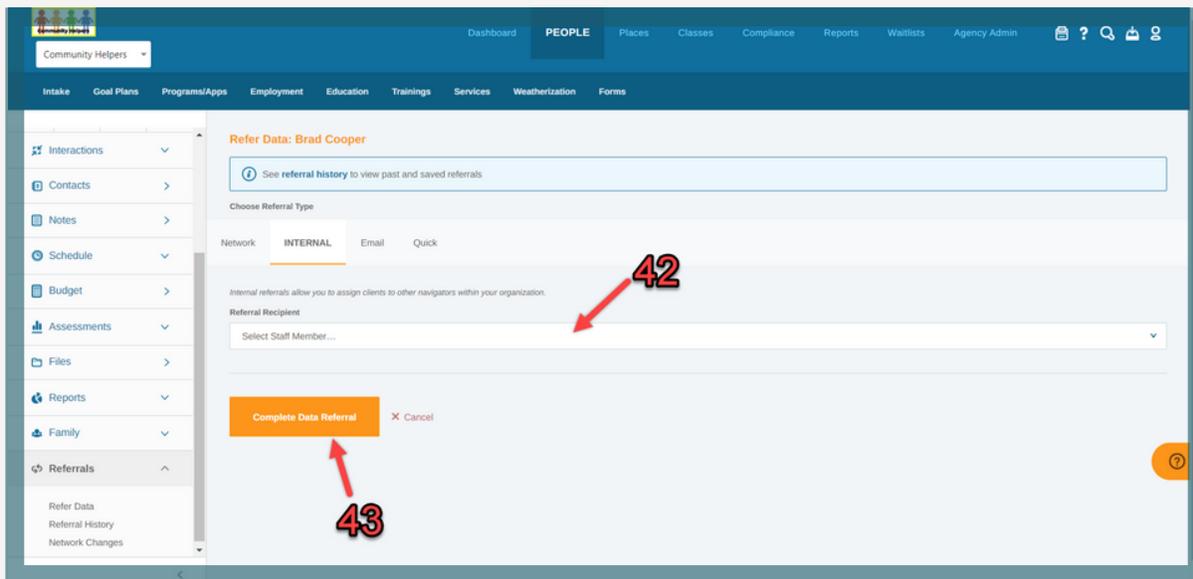
Steps 40-41



On the left sidebar, click on "Referrals" and then choose "Refer Data."

Tracking Client Data

Steps 42-43



Refer Client Internally:

Click "Referral Recipient" dropdown and select the navigator. Click "Complete Data Referral". Recipient will receive notification.

Tracking Client Data

Steps 44-46

The screenshot shows a web application interface for creating a referral via email. The interface includes a navigation menu on the left, a top navigation bar, and a main content area. Red arrows and numbers 44, 45, and 46 point to specific elements: 44 points to the 'Referral Recipient' email address input field, 45 points to the 'New Client' button under 'Select Forms', and 46 points to the 'Complete Data Referral' button at the bottom.

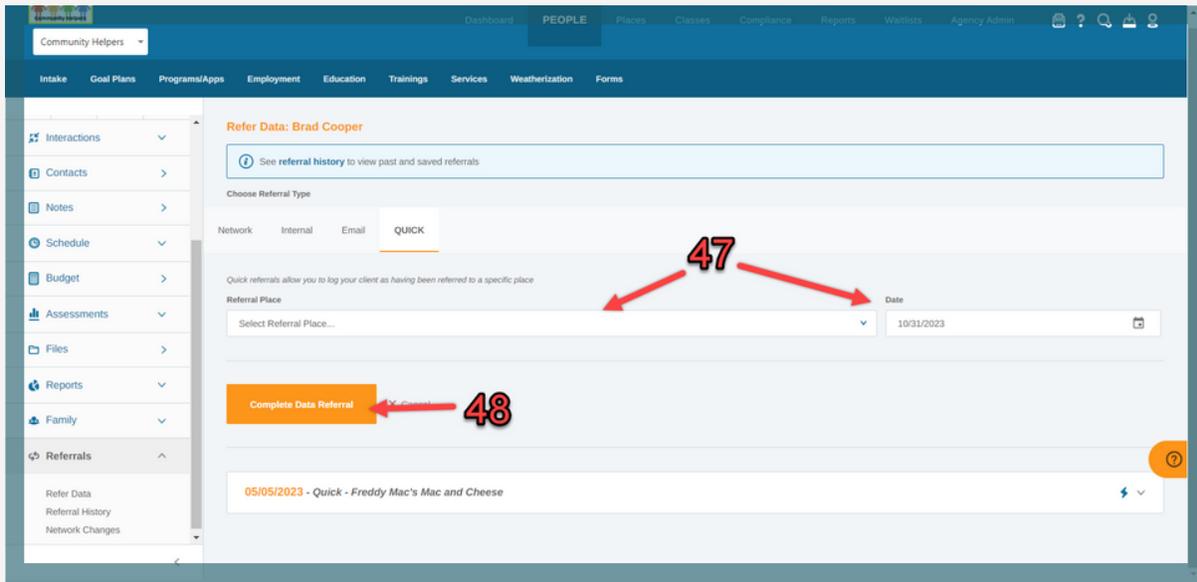
Refer Client via Email:

Enter referral recipient's email address.

Demographic data will be included. Select forms to include. Click "Complete Data Referral". An email referral will be sent.

Tracking Client Data

Steps 47-48



Document Quick Referral:

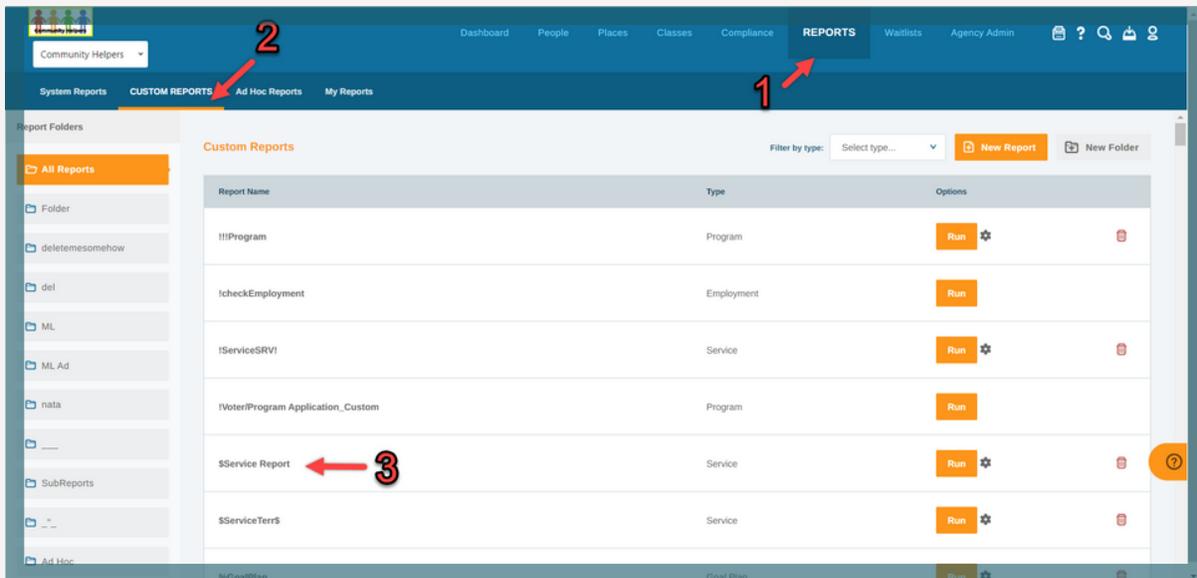
Select referral place from dropdown and enter referral date. Click "Complete Data Referral". Referral will be logged.



RUNNING REPORTS

Running Reports

Steps 1-3



Click Reports from the system navigation bar. Select the Custom Reports tab in the sub-navigation bar. From the list of reports below, locate the service report and click Run. You will be brought to the report's Filters in a new tab.

Running Reports

Steps 4-5

The screenshot shows the 'Service Report' interface. On the left, a sidebar lists filter categories: 'Client Assessed', 'Client Type', 'Client Created', 'Service', and 'Service Created'. The main area contains three filter sections, each with 'Start Date', 'End Date', and 'Defined Date Period' fields. A red arrow labeled '4' points to the 'Client Created' filter. At the bottom right, a red arrow labeled '5' points to the 'Run Report' button.

Locate the desired filters you wish to use to run the report and enter the appropriate parameters. When all desired report filters have been set up, scroll down and click Run Report.

Running Reports

Steps 6-8

The screenshot shows a web application interface for running reports. The navigation bar includes 'Dashboard', 'People', 'Places', 'Classes', 'Compliance', 'REPORTS', 'Waitlists', and 'Agency Admin'. The 'REPORTS' section is active, showing a 'Set Report Filters' section with a 'Data Filters' dropdown (labeled 6) and a 'Filter Combination Setting' section. The 'Data Filters' dropdown is open, showing a list of filters (labeled 7). The 'Filter Combination Setting' section shows a filter combination: 'Match ANY Client Assessed: 05/01/2023 - 10/31/2023 Client Type: Client Created: 05/01/2023 - 10/31/2023 Service: Warming Center Service Created: 05/01/2023 - 10/31/2023'. The 'Report View' dropdown (labeled 8) is also visible, showing options for 'Report View', 'List', 'Chart', and 'Graph'. Below the filters, a table displays service data with columns for Case Number, First Name, Service Name, Service Status, Service Start Date, and Service Created Date. The table contains 13 rows of data.

Case Number	First Name	Service Name	Service Status	Service Start Date	Service Created Date
1026	Adrienne	Community College Referral	N/A	08/12/2021	08/12/2021
1026	Adrienne	Cover Letter Development	N/A	08/12/2021	08/12/2021
1045	Kidz	Resume Development	N/A	06/07/2023	06/07/2023
1000	Samantha	Food Bank Referral	N/A	08/12/2021	08/12/2021
1434	Fred	Food Bank Referral	Approved	01/01/2023	07/05/2023
1438	George	Food Bank Referral	N/A	07/05/2023	07/05/2023
1202	Delta	Food Bank Referral	N/A	10/25/2021	10/25/2021
1203	Petey	Counseling Services-Substance abuse (Referral)	N/A	10/25/2021	10/25/2021
1171	Bob	Assisted living/Nursing Home	N/A	09/01/2023	09/01/2023
1025	Caroline	****Energy Assistance	N/A	08/12/2021	08/12/2021
1000	Samantha	Bus Tickets	N/A	08/12/2021	08/12/2021
1023	Jumpy	Bus Tickets	N/A	08/17/2021	08/17/2021

Select Data Filters on the left. Choose as many or few Report Column options to filter data. Click on column headers to arrange data in ascending or descending order. Select from list, chart, or graph formats to view the data differently.

Running Reports

Steps 9-11

Community Helpers

Dashboard People Places Classes Compliance **REPORTS** Waitlists Agency Admin

Service Report

Set Report Filters

To not include a filter when you run the report, simply leave the filter options blank.

Filter Combination Setting: Match ANY Client Assessed: 05/01/2023 - 10/31/2023 Client Type: Client Created: 05/01/2023 - 10/31/2023 Service: Warming Center Service Created: 05/01/2023 - 10/31/2023

Data Filters

Report View: [Icons]

Count: 283

Case Number	First Name	Service Name	Service Status	Service Start Date	Service Created Date
1026	Adrienne	Community College Referral	N/A	08/12/2021	08/12/2021
1026	Adrienne	Cover Letter Development	N/A	08/12/2021	08/12/2021
1045	Kid2	Resume Development	N/A	06/07/2023	06/07/2023
1000	Samantha	Food Bank Referral	N/A	08/12/2021	08/12/2021
1434	Fred	Food Bank Referral	Approved	01/01/2021	07/05/2023
1438	George	Food Bank Referral	N/A	07/05/2023	07/05/2023
1202	Delta	Food Bank Referral	N/A	10/25/2021	10/25/2021
1203	Petey	Counseling Services-Substance abuse (Referral)	N/A	10/25/2021	10/25/2021
1171	Bob	Assisted Living/Nursing Home	N/A	09/01/2023	09/01/2023
1035	Caroline	****Energy Assistance	N/A	08/13/2021	08/12/2021
1000	Samantha	Bus Tickets	N/A	08/12/2021	08/12/2021
1023	Jumpy	Bus Tickets	N/A	08/17/2021	08/17/2021

To change report filters, click "Change Filters". To download report results, click "Download CSV". The system will prepare and export the data as a CSV file. Click the "Print" button to print results. Repeat steps 1-11 for client interaction reports.



CONTINUOUS IMPROVEMENT

Continuous Improvement

Steps 1-2



For accuracy and efficiency, check service names, interaction logs, and referral methods.



Implement NOTS team suggestions to improve system usage.





Your journey

HAS BEGUN.

Let's Grow Together!