OCTOBER 2023

eLogicGenesis©

Training Guide

Presented by: The Center for Applied Management Practices

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eLogic Genesis

Welcome

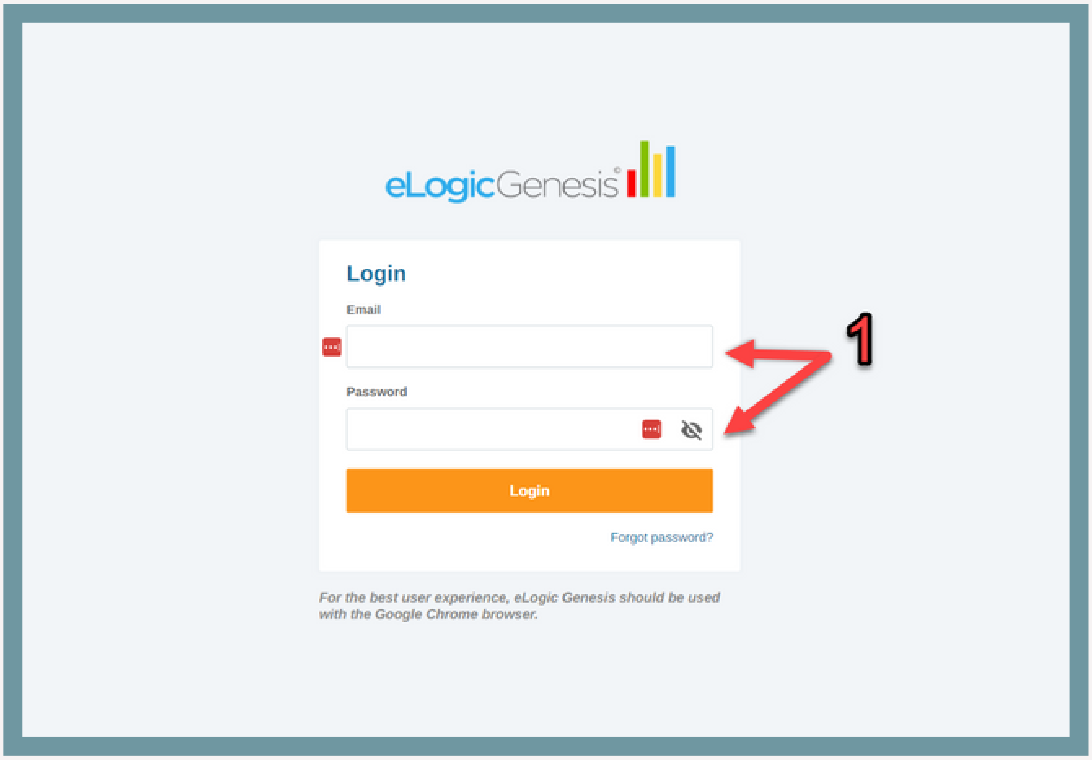
Welcome to eLogic Genesis! We are delighted to have you as a user of our SAAS. Whether you're a seasoned professional or just starting, our software is designed to streamline your work and enhance productivity. With our intuitive interface and robust features, you'll be able to tackle complex tasks with 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

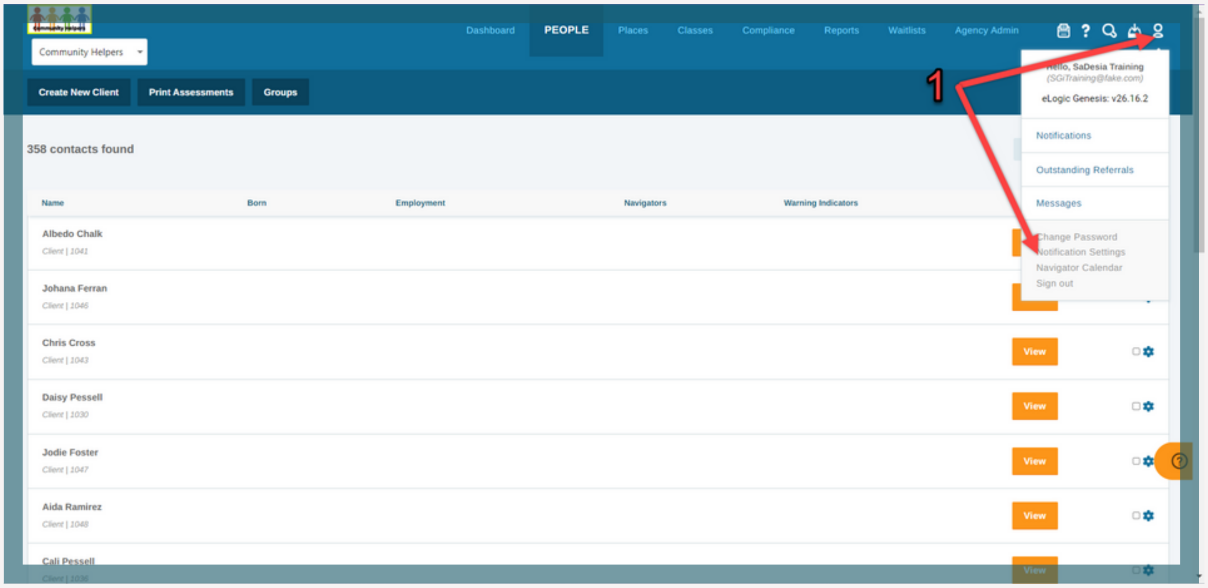


To access your Elogic Genesis account, please log in with your registered email and password.

USER SETTINGS

User Settings

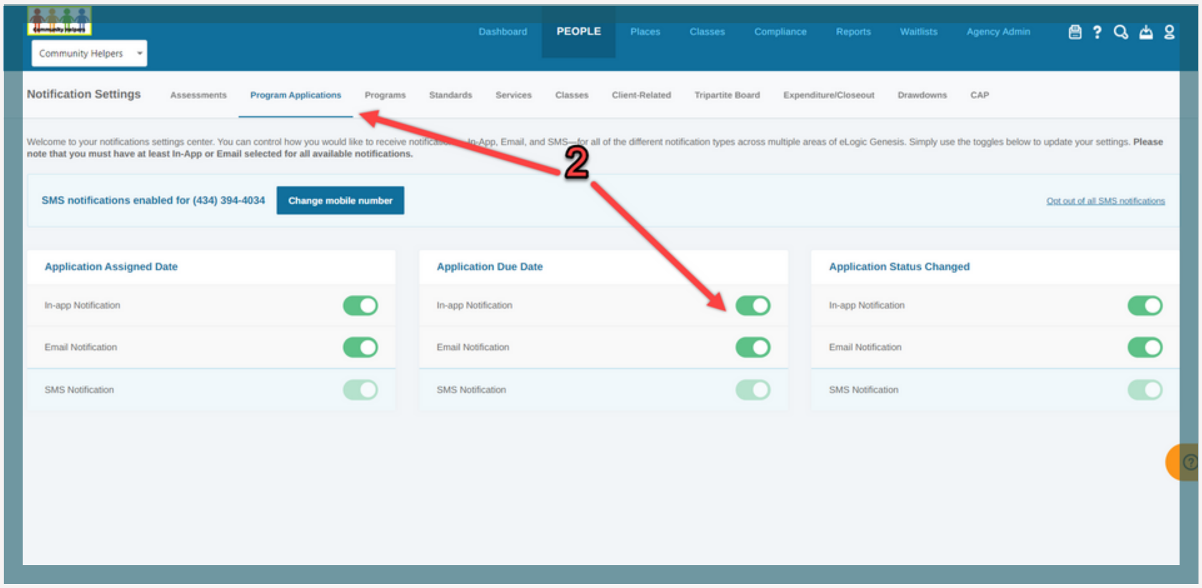
Step 1



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

User Settings

Step 2

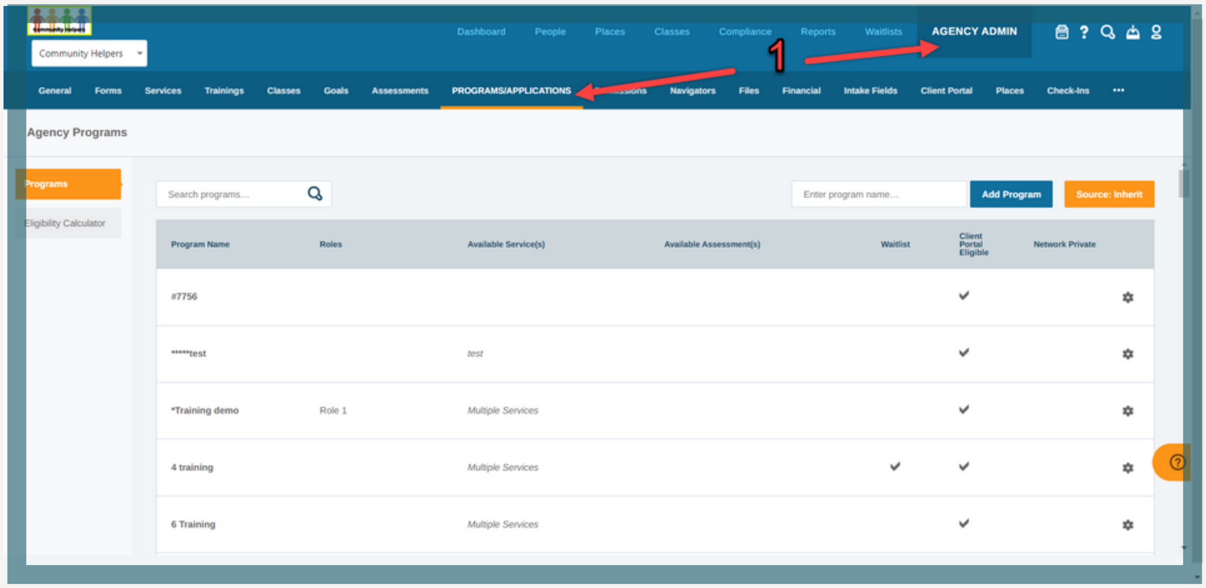


Toggle between the various notification boxes. By clicking the slide button for each notification option, choose your desired delivery method(s). With each choice, the system will automatically save.

AGENCY ADMIN: PROGRAMS

Agency Admin: Programs

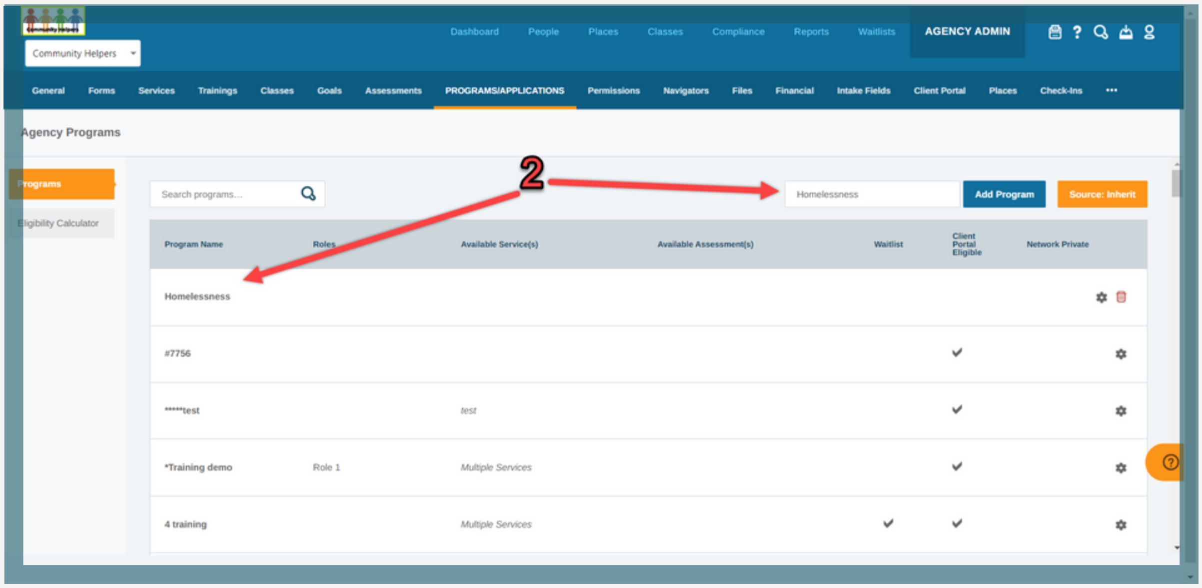
Step 1



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

Agency Admin: Programs

Step 2

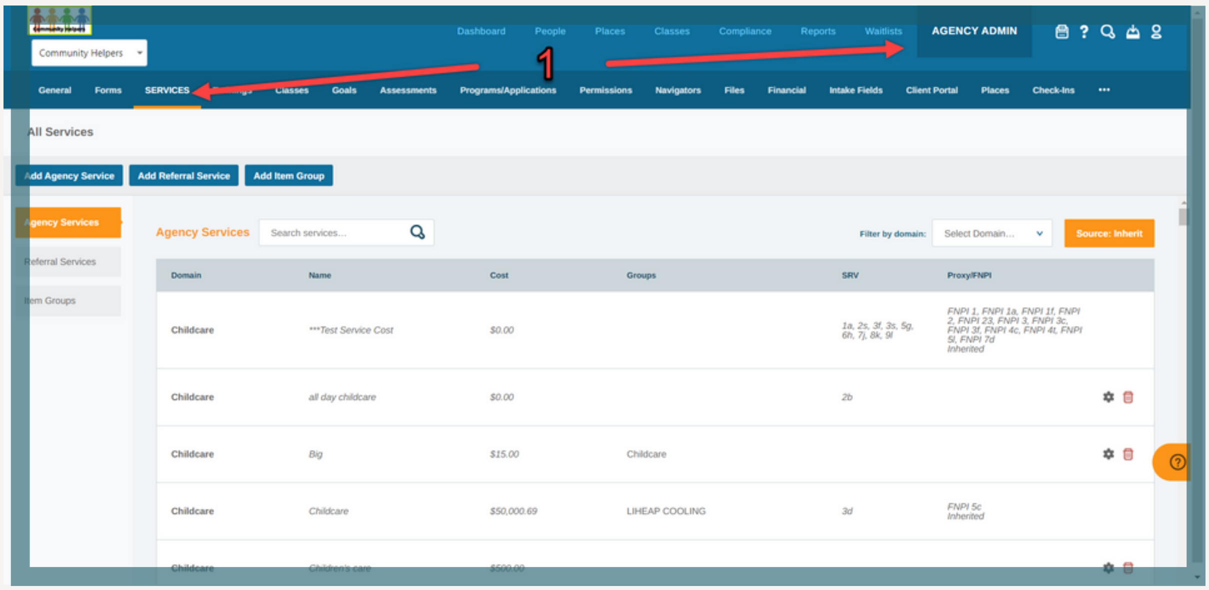


Enter "Homelessness" in the textbox on the right and click Add Program.
The program will be shown below.

AGENCY ADMIN: DIRECT & REFERRAL SERVICES

Agency Admin: Direct Services

Step 1

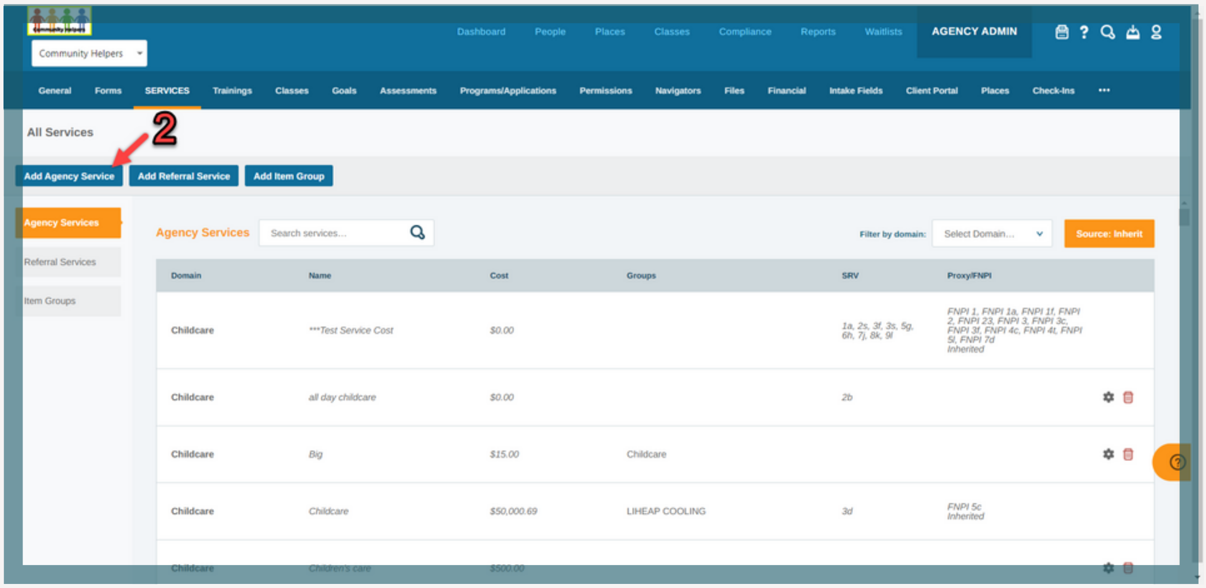


Direct Services:

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

Agency Admin: Direct Services

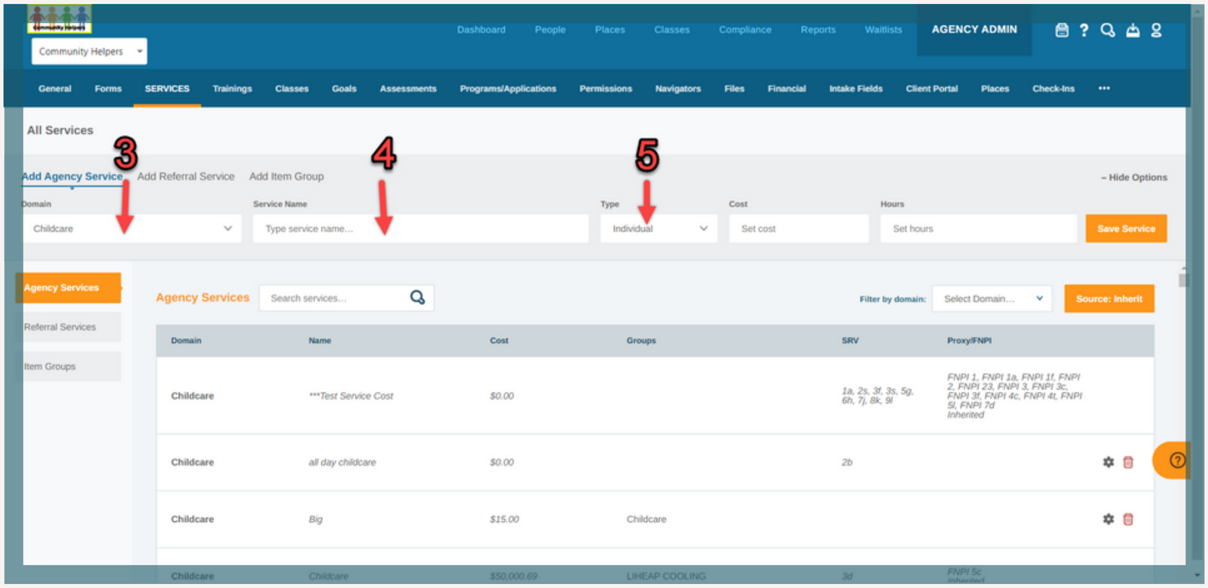
Step 2



Click Add Agency Service - the space below will enlarge.

Agency Admin: Direct Services

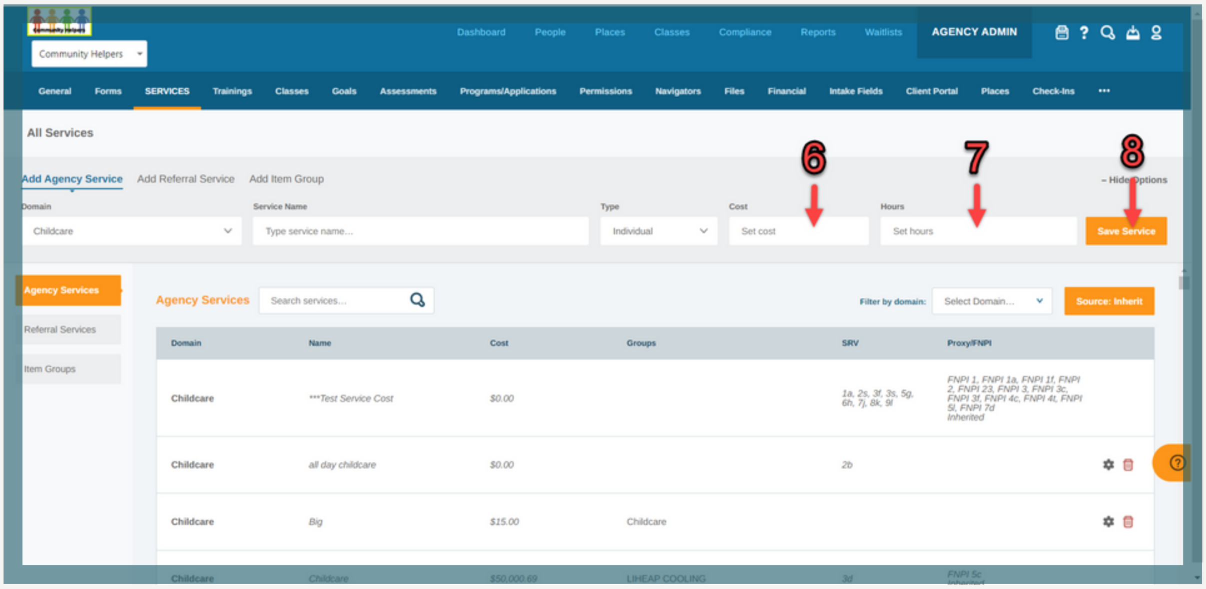
Steps 3-5



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

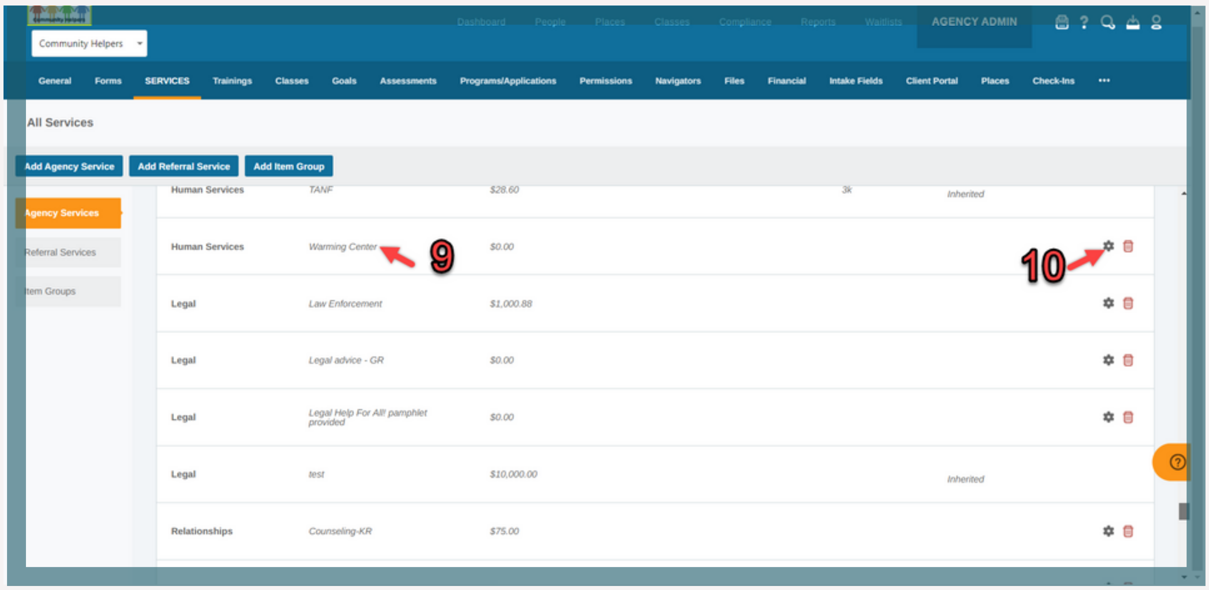
Steps 6-8



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

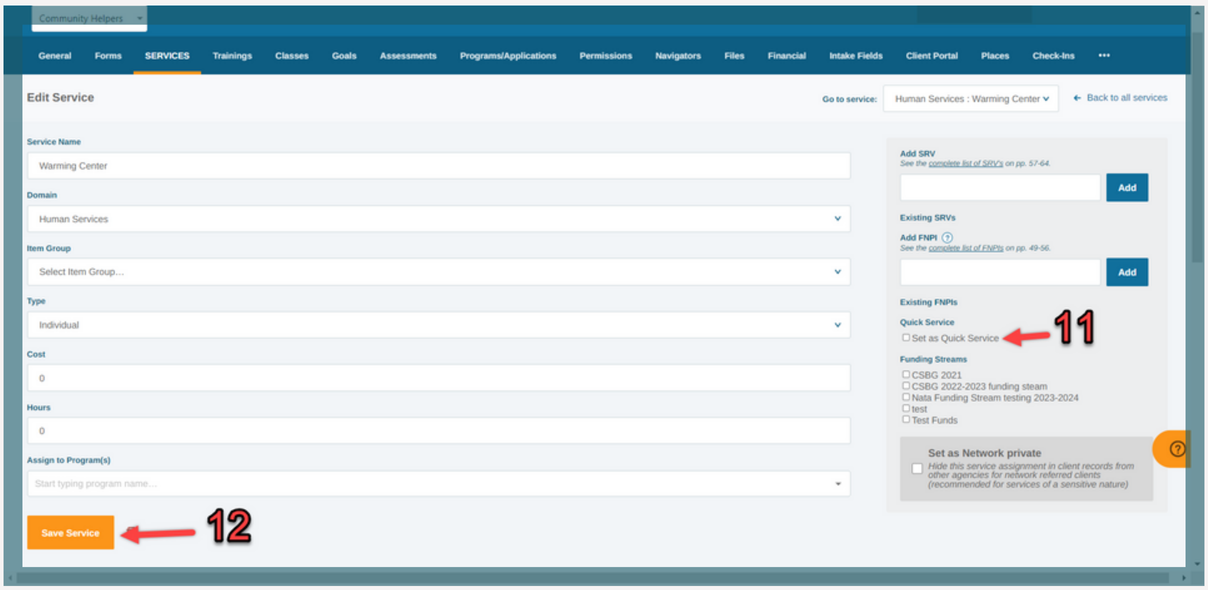
Steps 9-10



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

Agency Admin: Direct Services

Steps 11-12

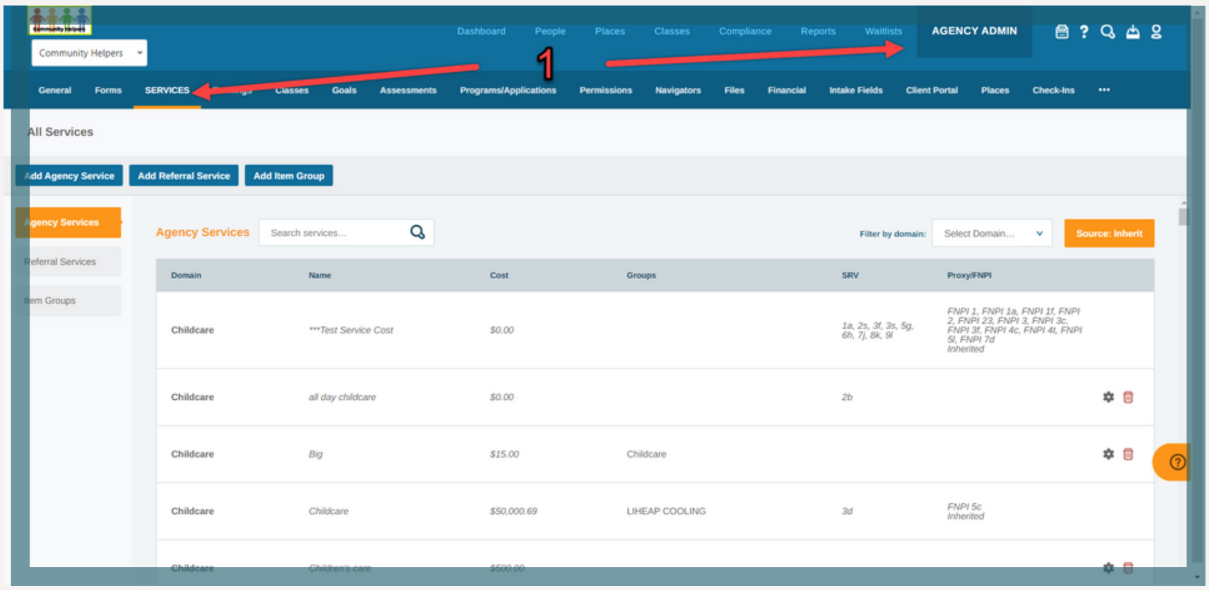


Click the checkbox next to Set as Quick Service.
Click Save Service.

Note: All direct services should be marked as "quick".

Agency Admin: Referral Services

Step 1

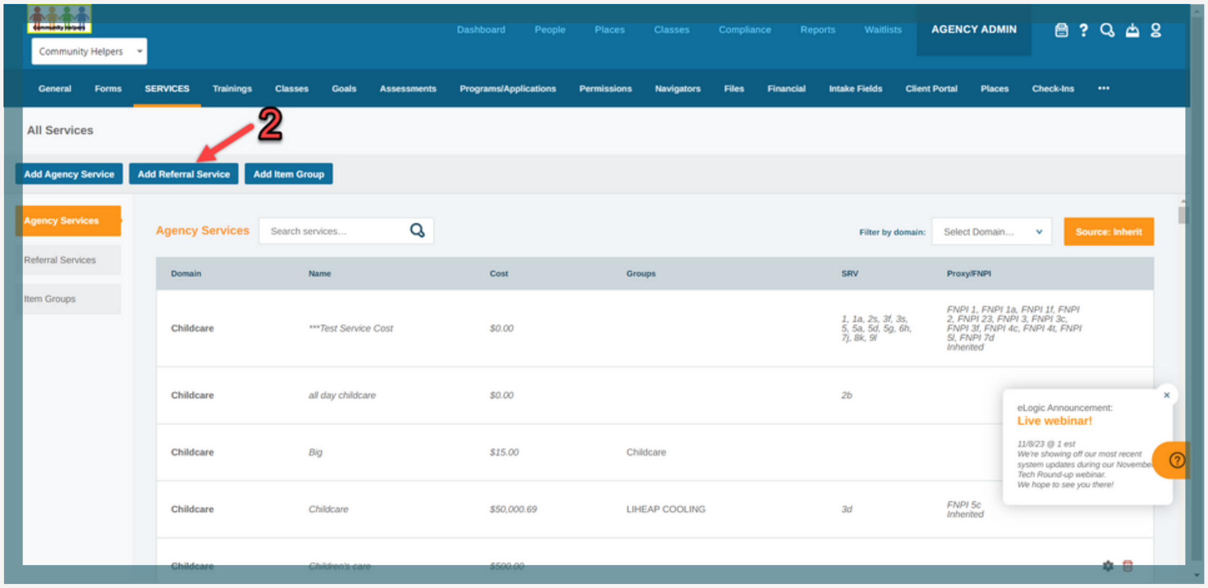


Referral Services:

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

Agency Admin: Referral Services

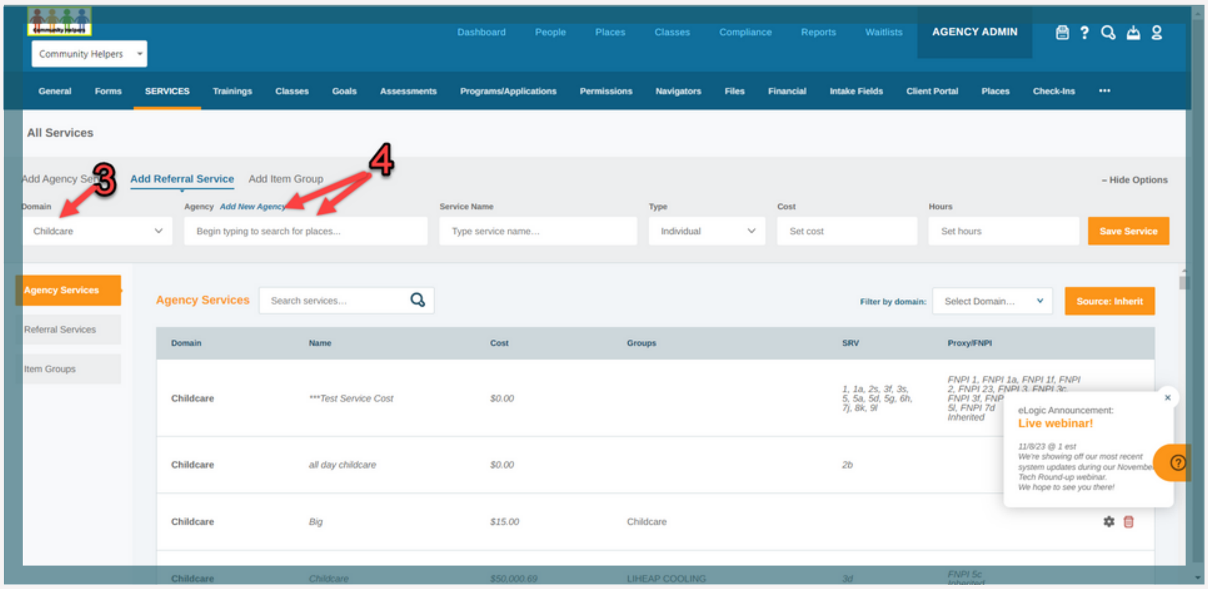
Step 2



Click Add Referral Service - the space below will enlarge.

Agency Admin: Referral Services

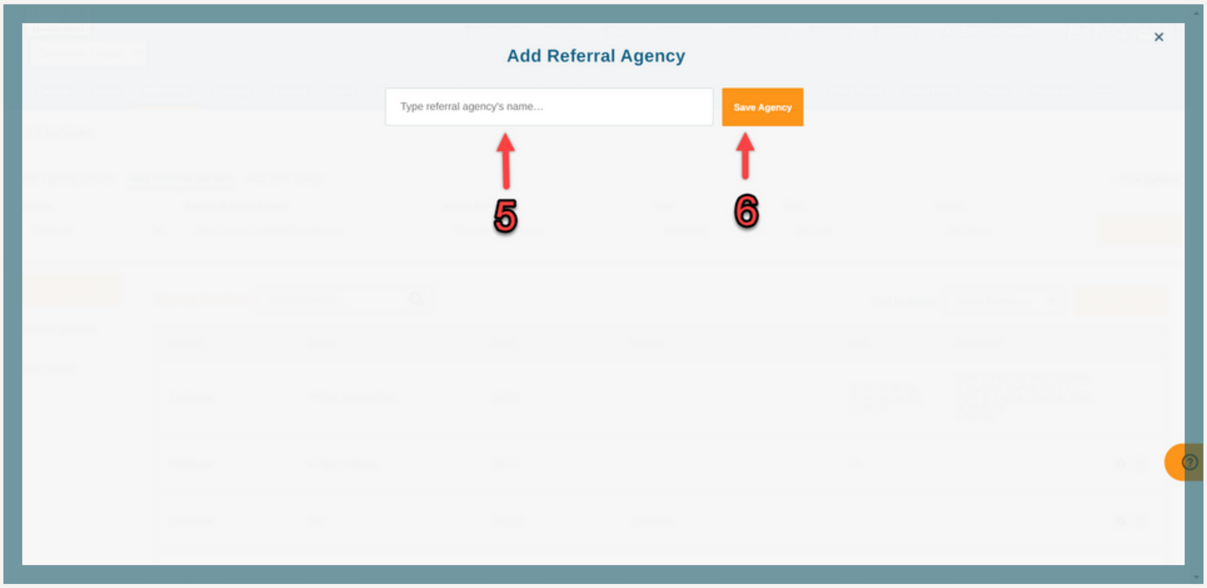
Steps 3-4



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

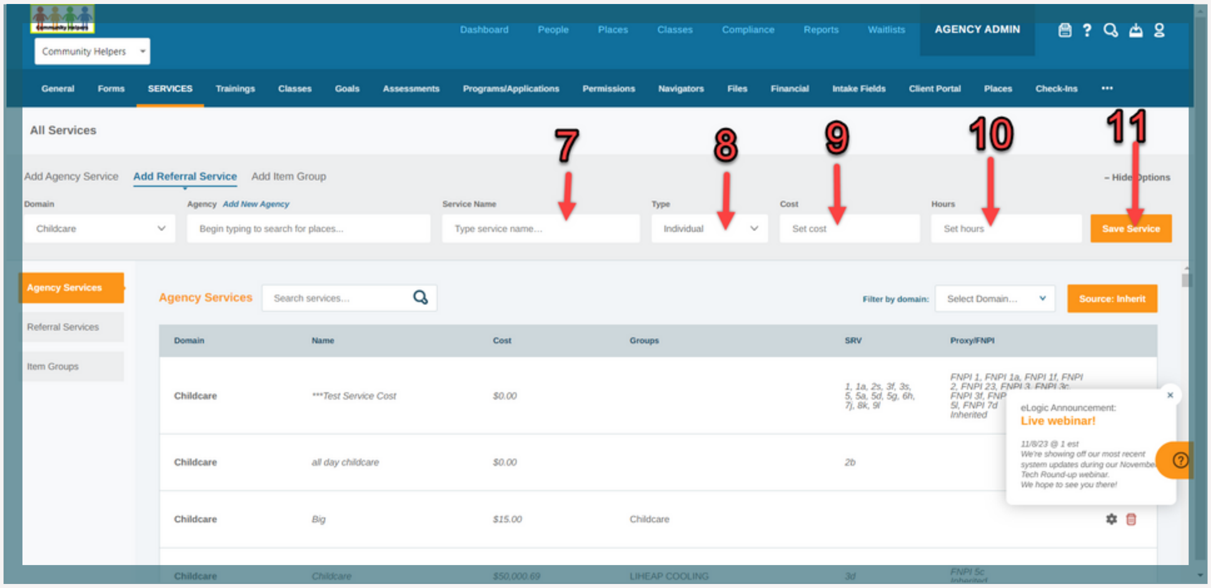
Steps 5-6



Enter Agency name and click Save Agency.

Agency Admin: Referral Services

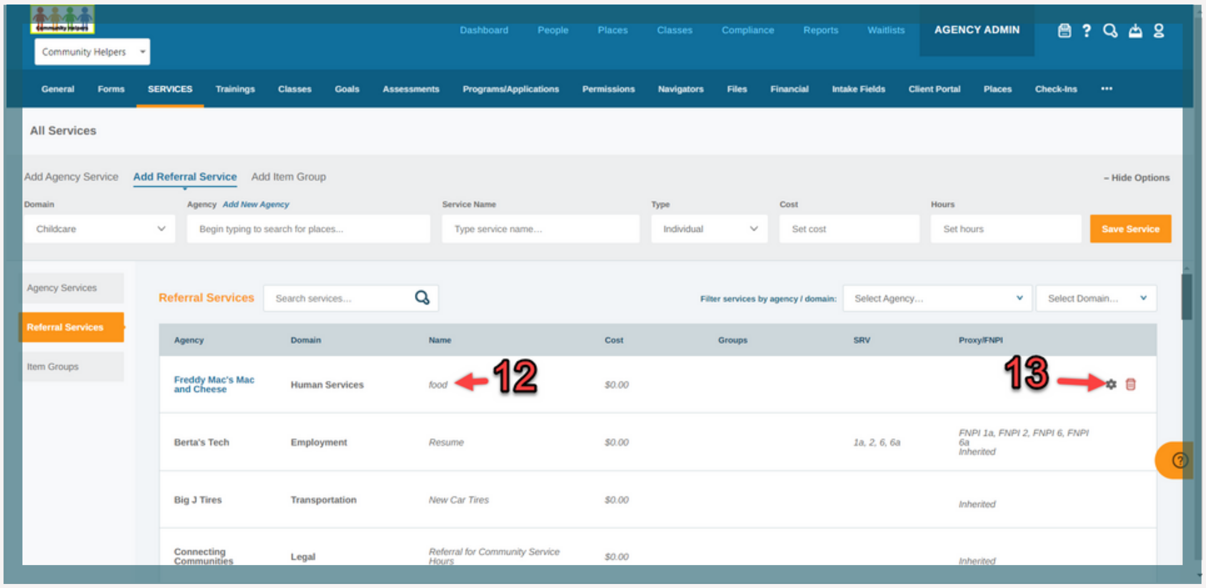
Steps 7-11



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

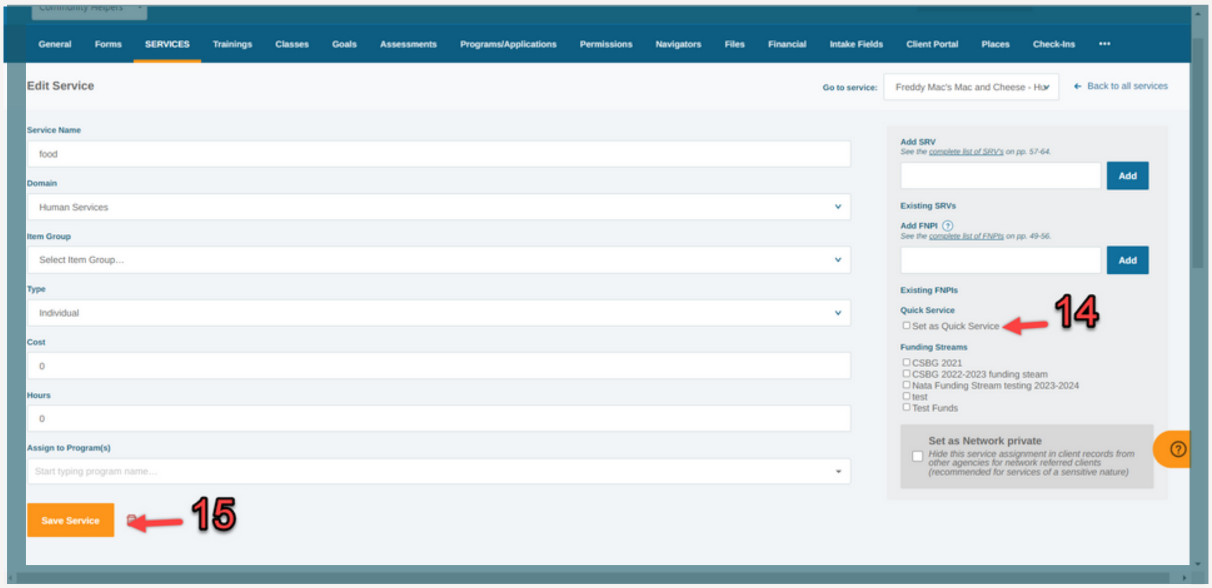
Steps 12-13



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

Agency Admin: Referral Services

Steps 14-15



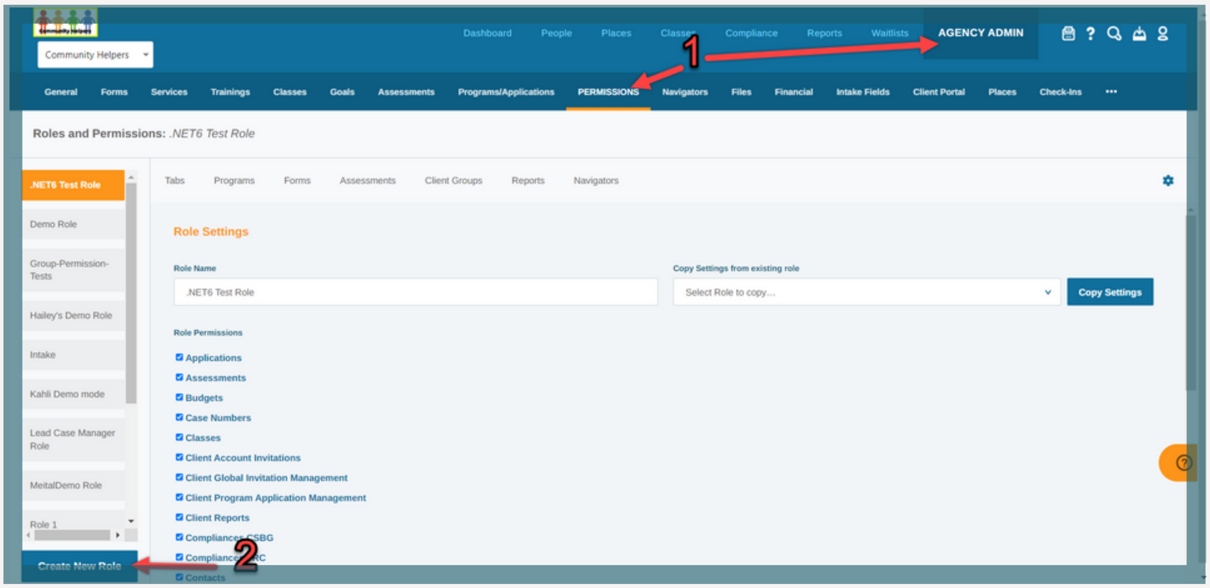
Click the checkbox next to Set as Quick Service.
Click Save Service.

Note: All referral services should be marked as "quick."

AGENCY ADMIN: PERMISSIONS

Agency Admin: Permissions

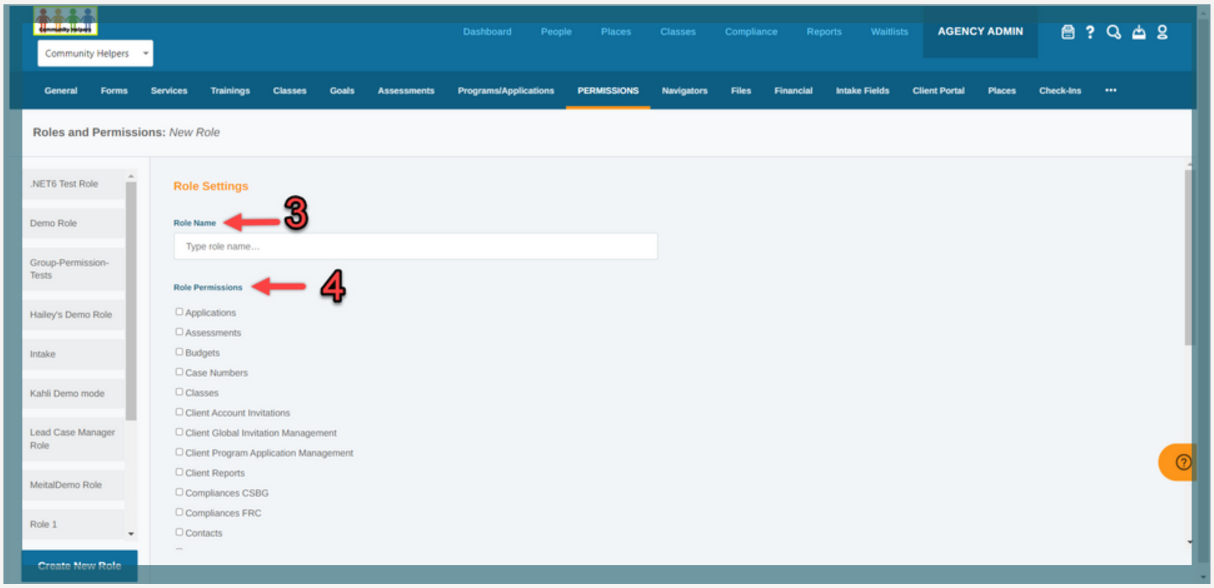
Step 1-2



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

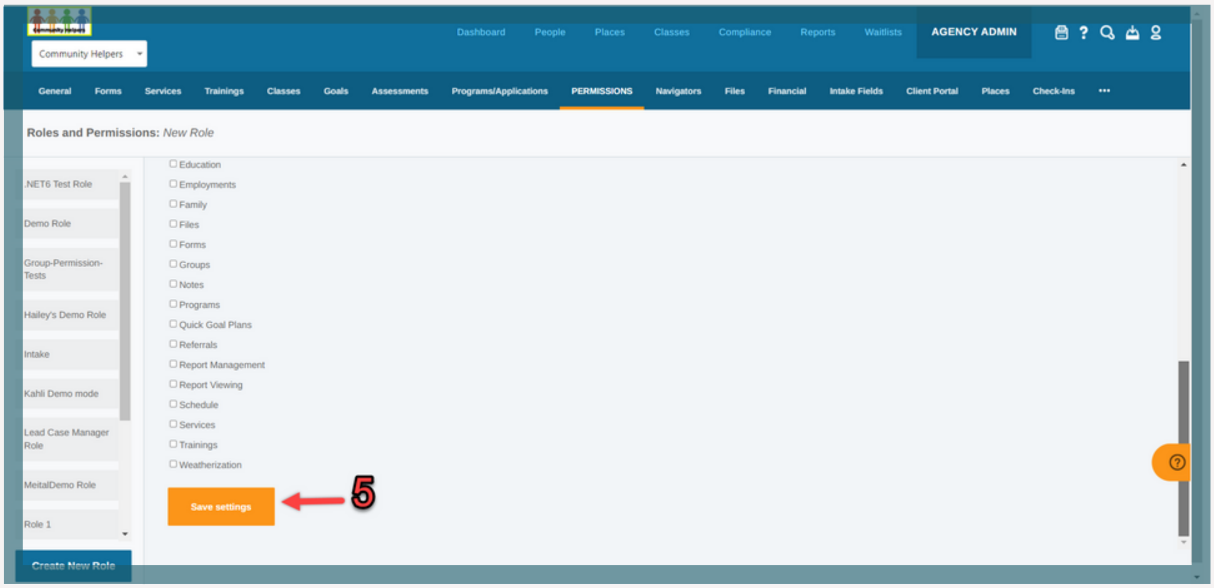
Steps 3-4



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

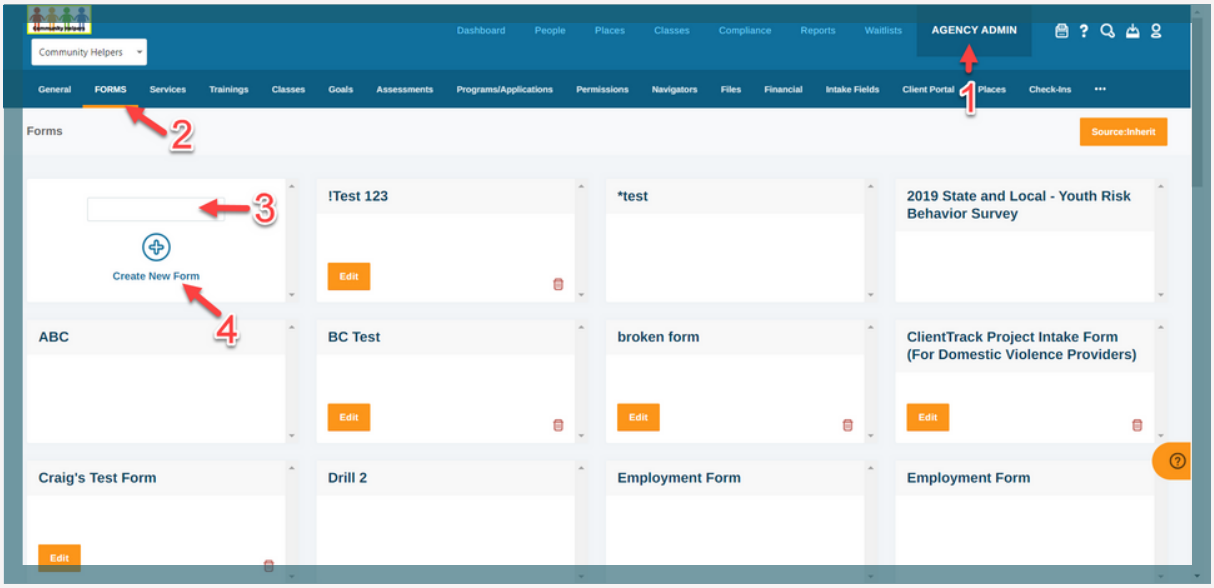


Scroll down and click Save settings.

AGENCY ADMIN: FORMS

Agency Admin: Forms

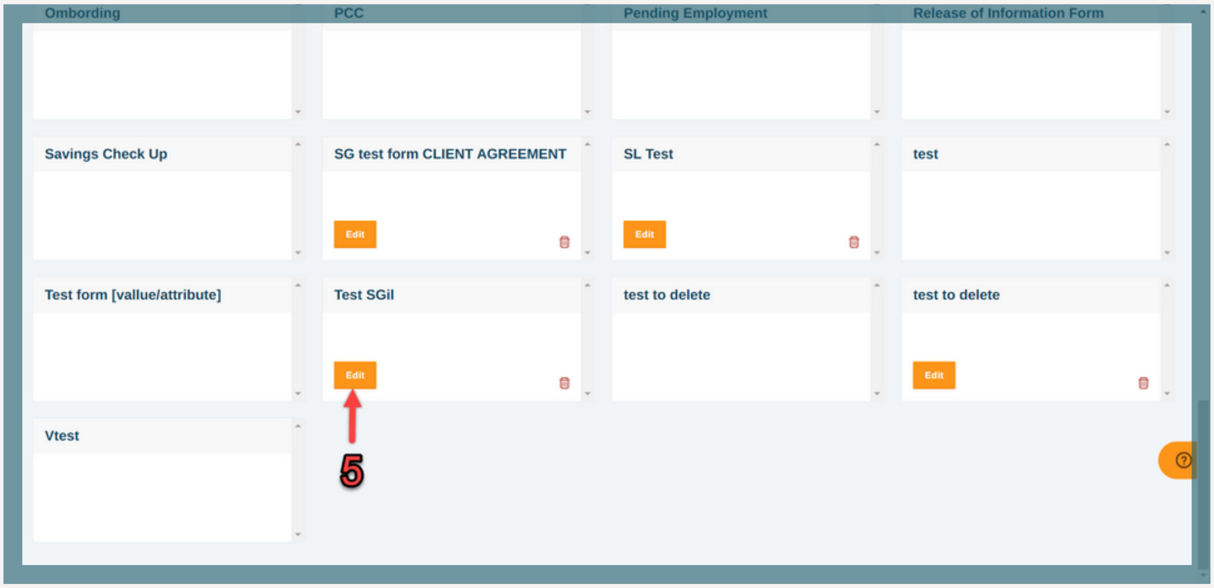
Steps 1-4



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

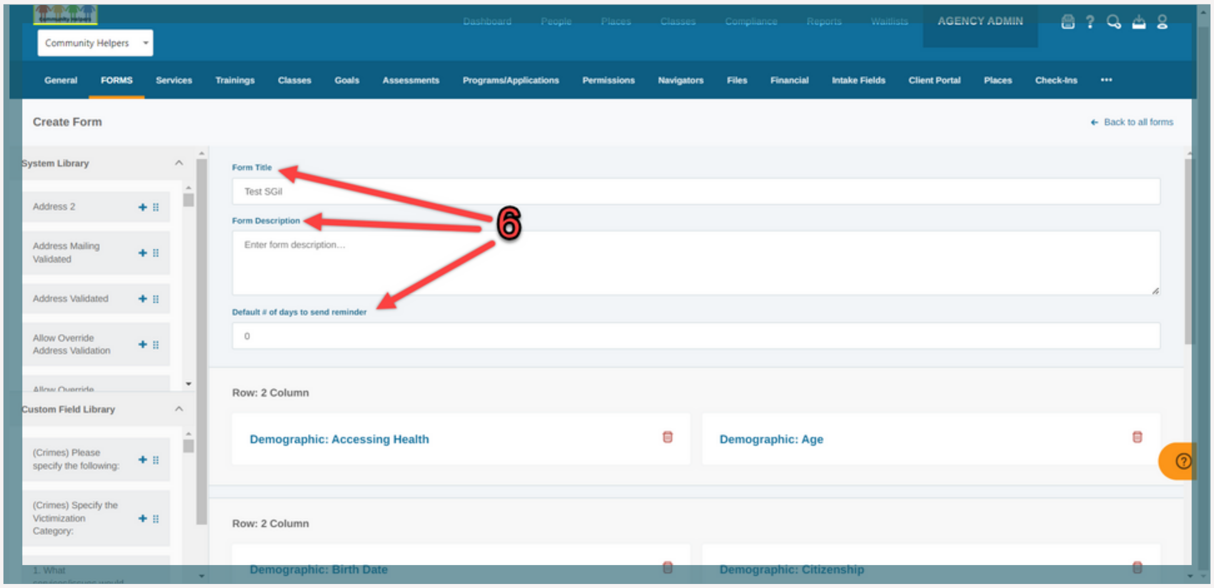
Step 5



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

Agency Admin: Forms

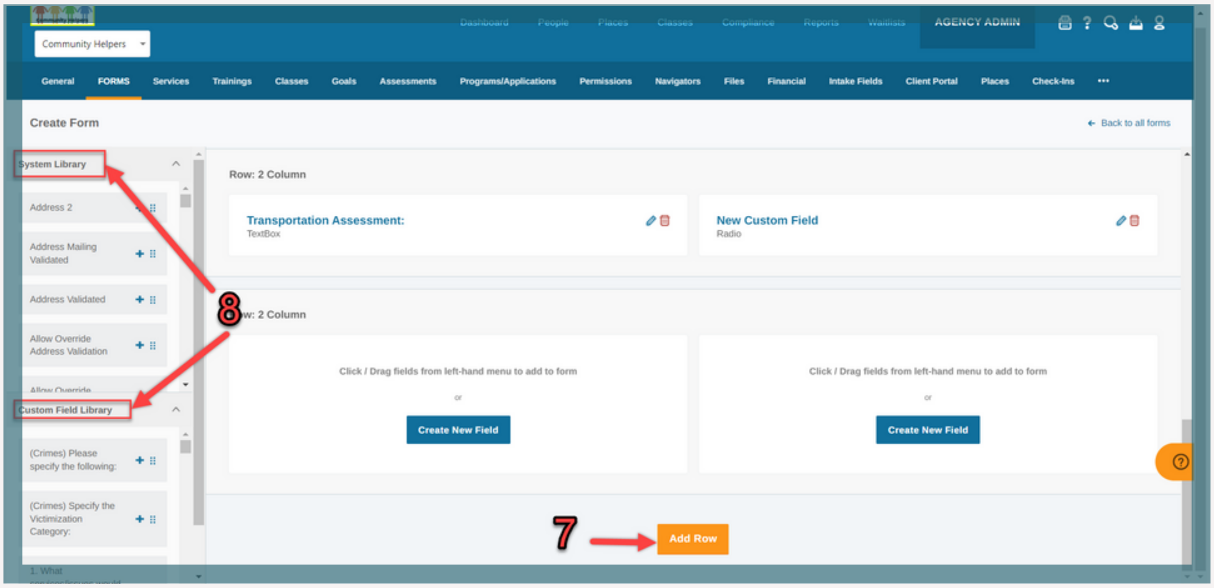
Step 6



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

Agency Admin: Forms

Steps 7-8

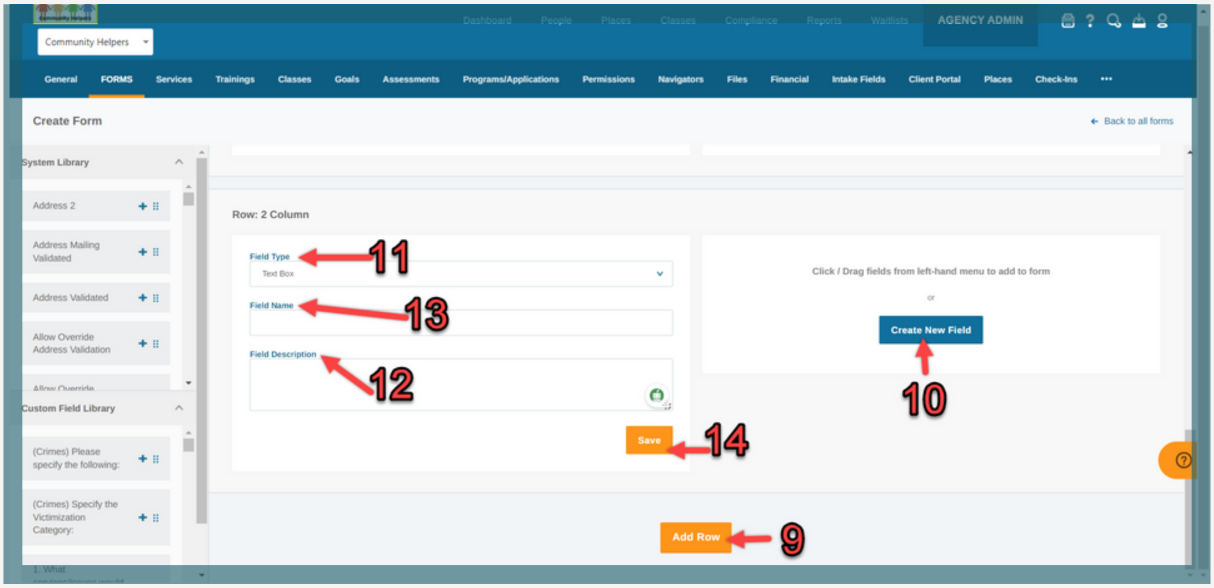


Adding fields:

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



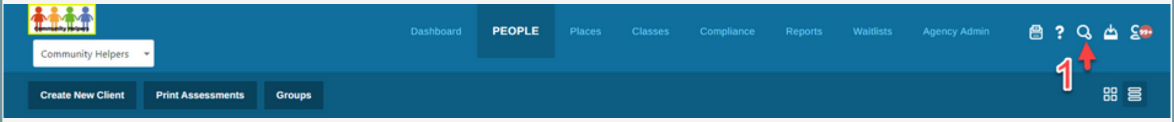
Adding custom fields:

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

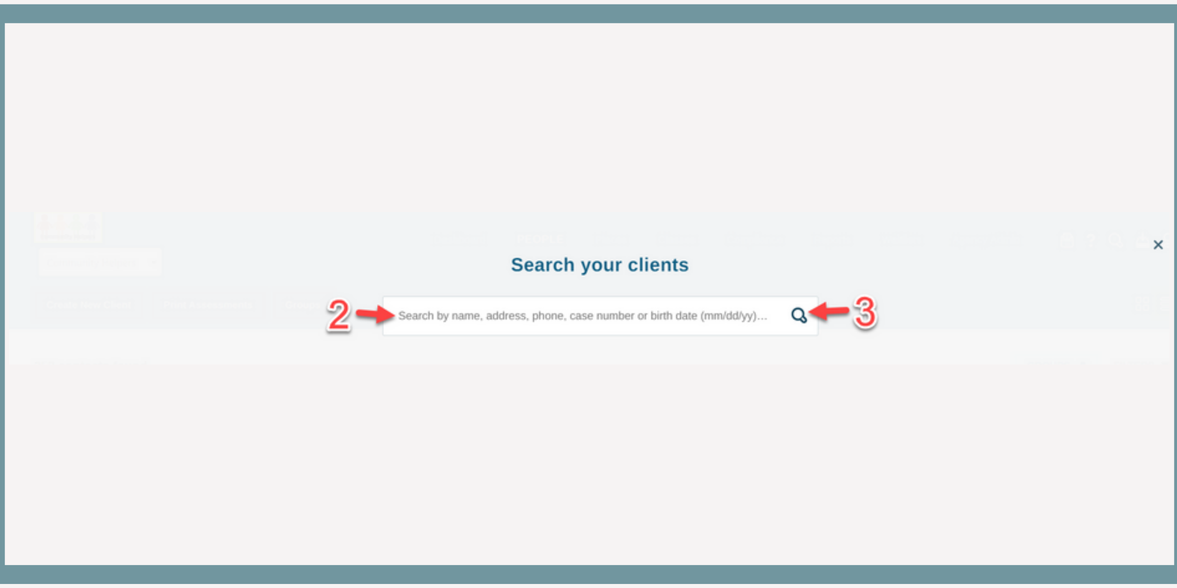
Step 1



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.

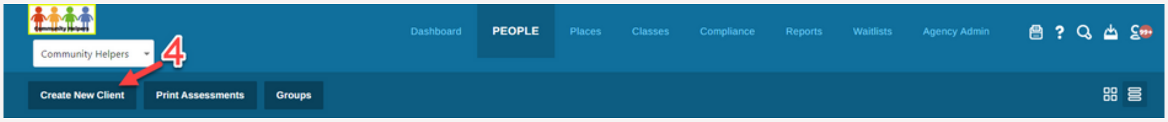
Tracking Client Data

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.

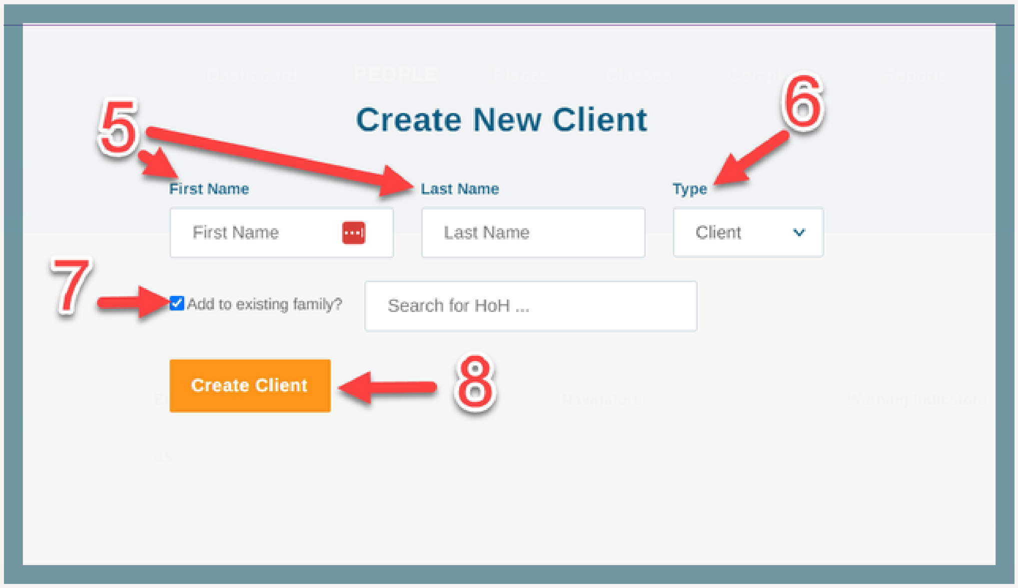
Step 4



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.

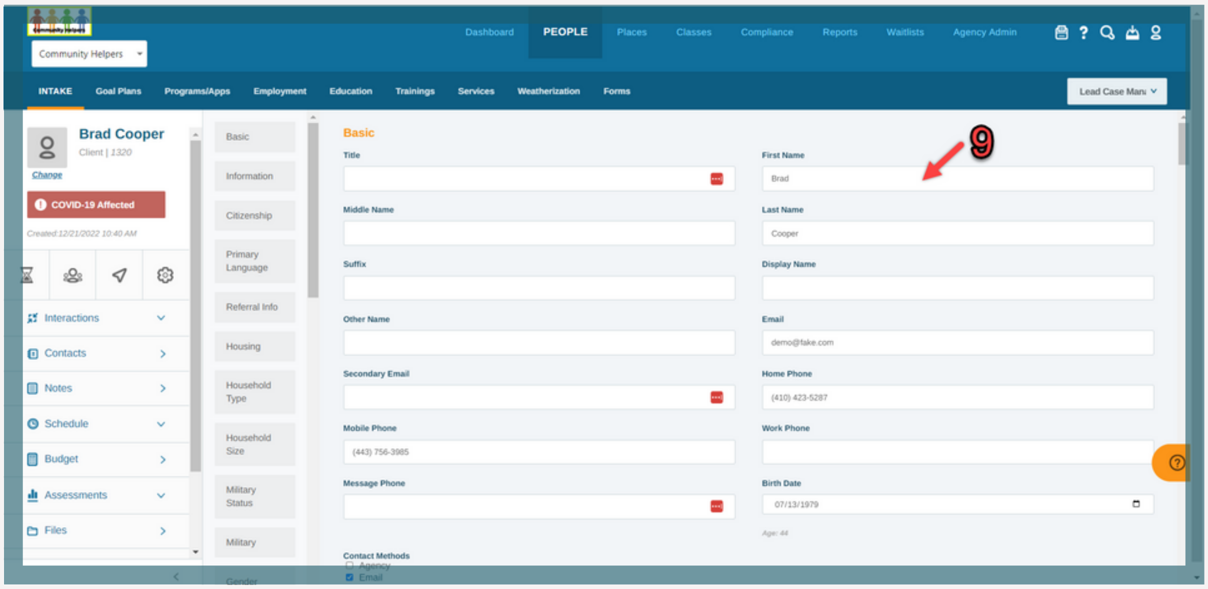
Tracking Client Data

Steps 5-8



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".

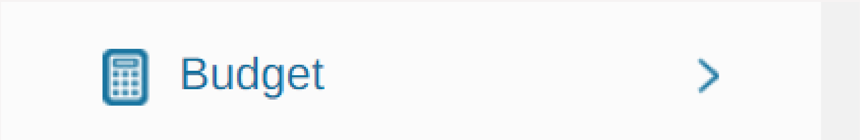
Step 9



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

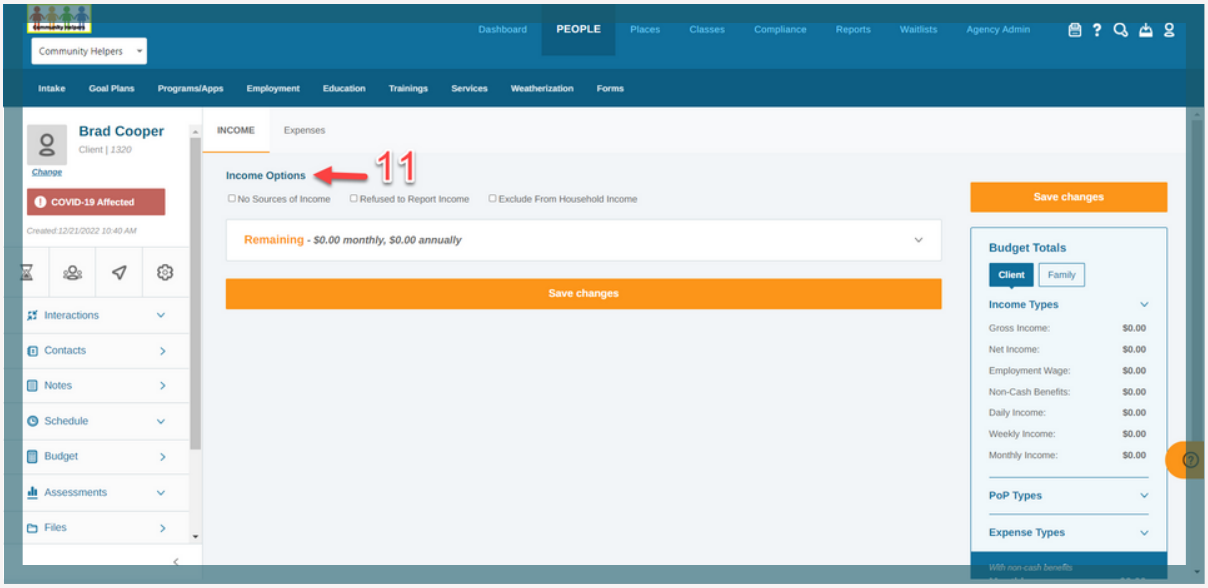
Step 10



Click the "Budget" subtab.

Tracking Client Data

Step 11

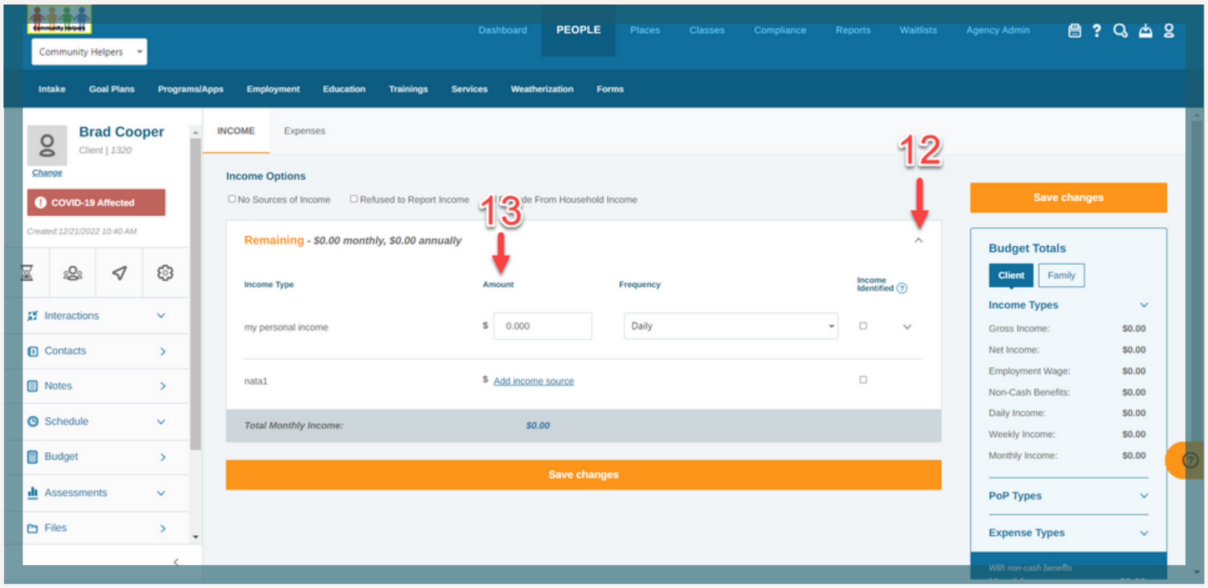


Select the applicable check-boxes:

- 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

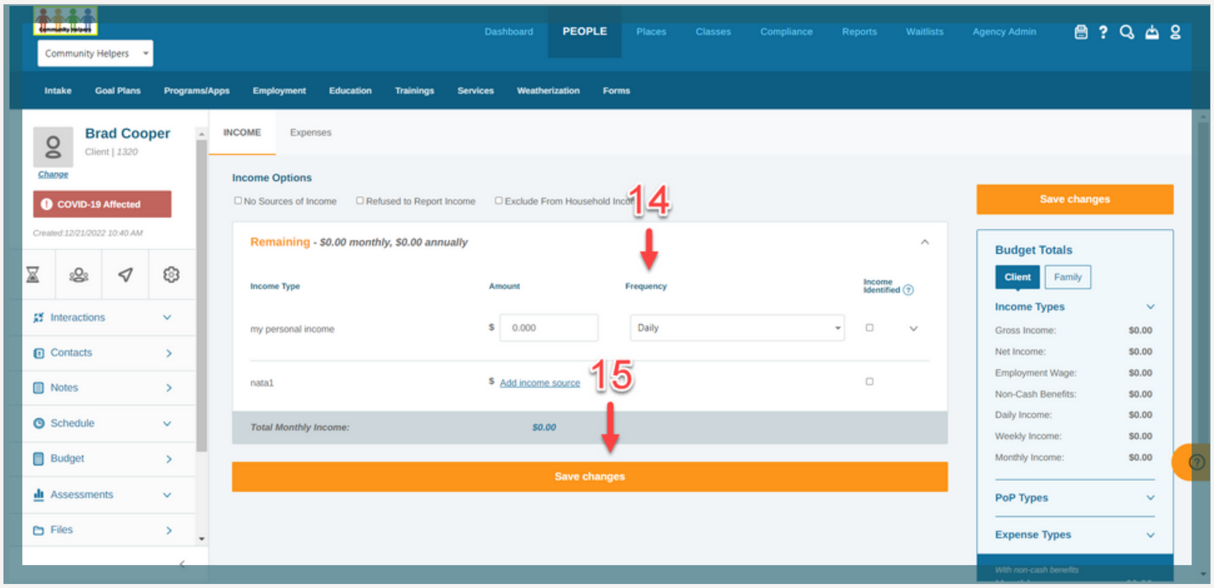
Steps 12-13



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



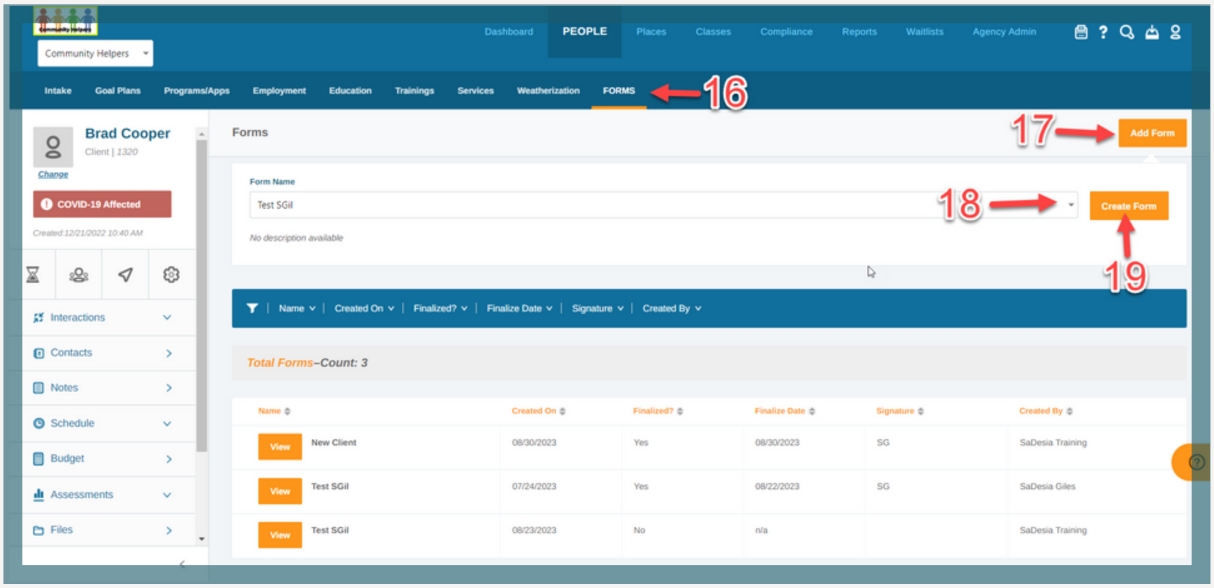
Select Frequency from the drop-down list

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

Click Save changes.

Tracking Client Data

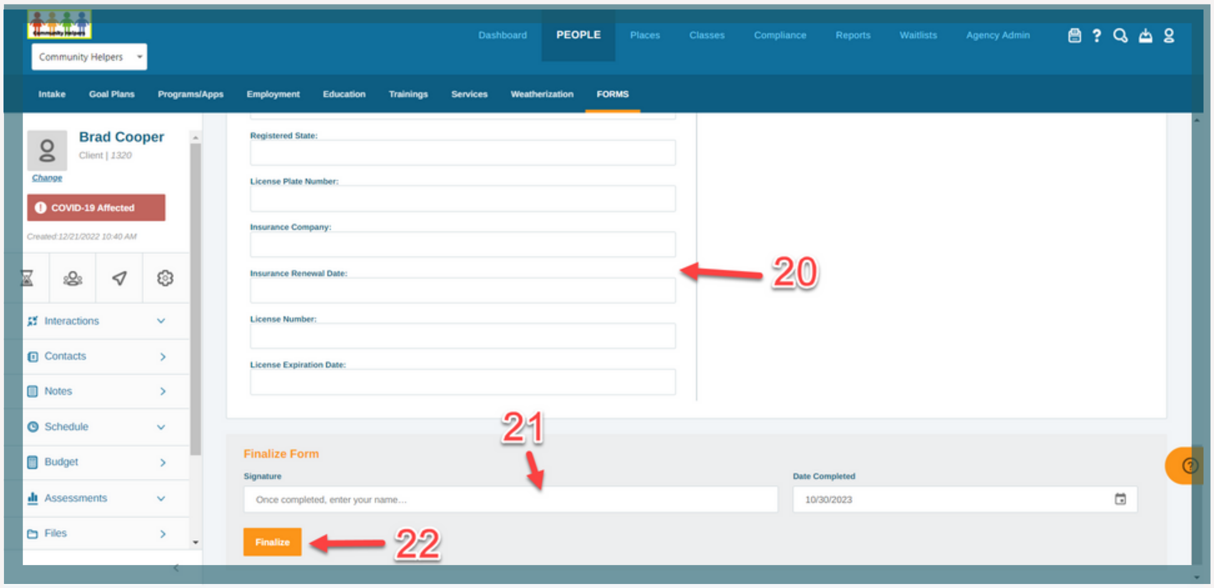
Steps 16-19



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

Tracking Client Data

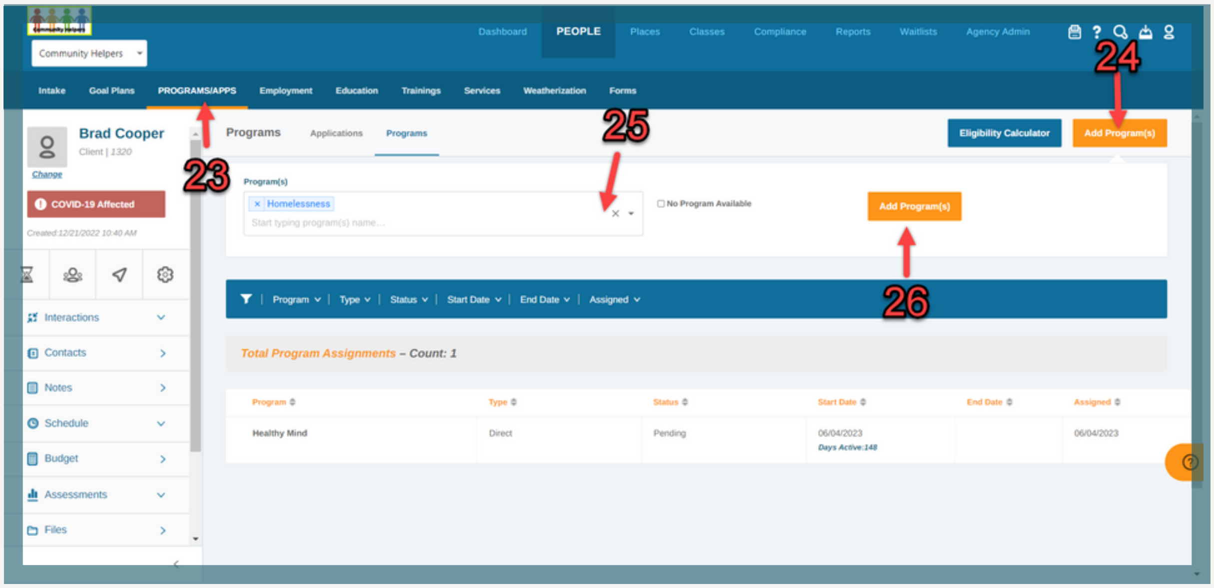
Steps 20-22



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

Tracking Client Data

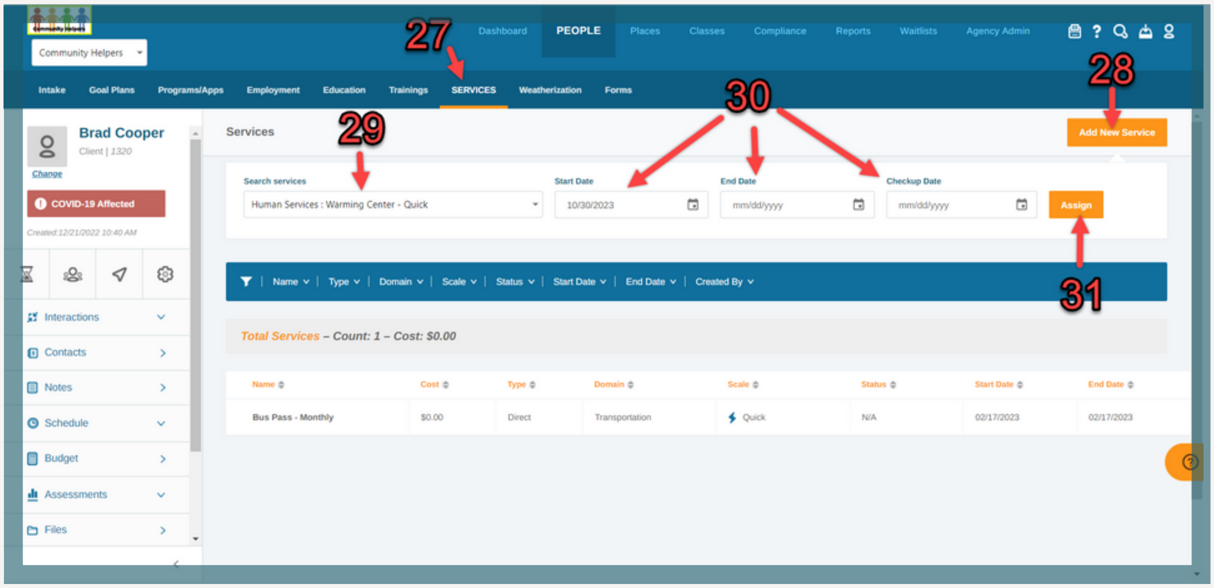
Steps 23-26



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

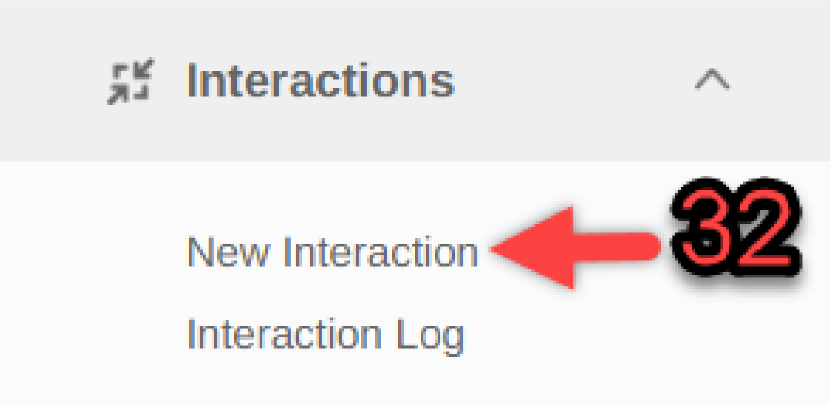
Steps 27-31



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

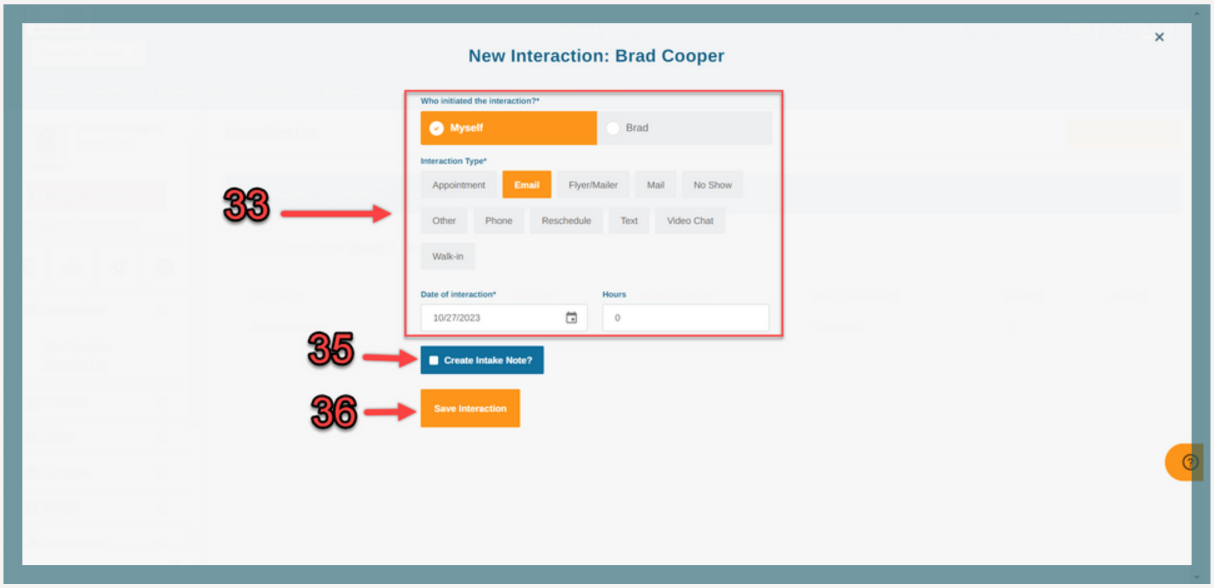
Step 32



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

Tracking Client Data

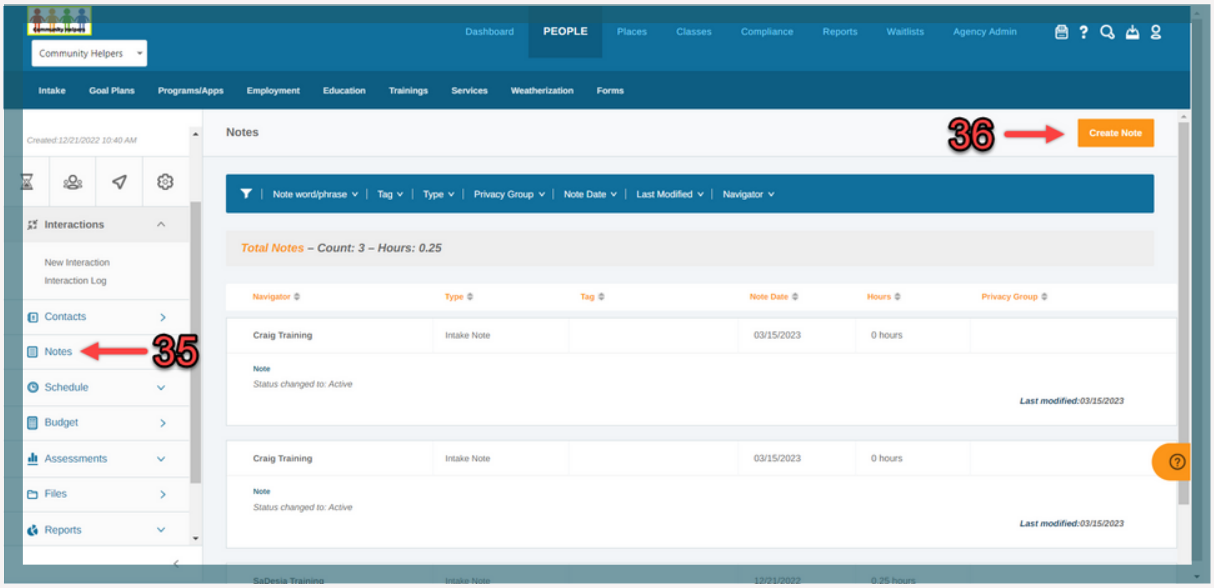
Steps 33-35



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

Tracking Client Data

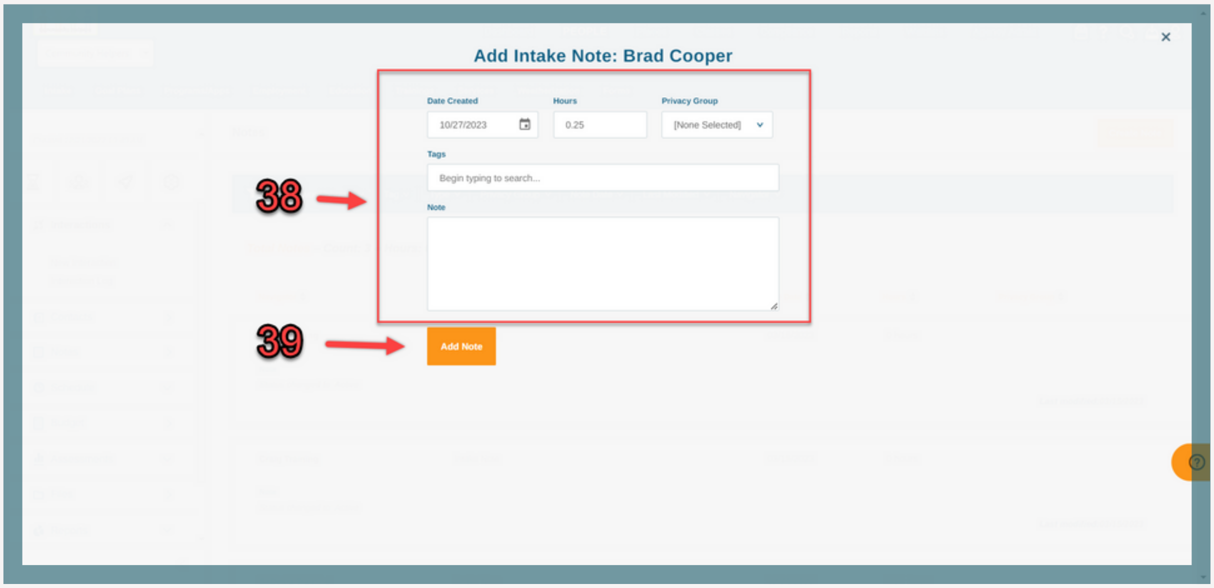
Steps 36-37



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

Tracking Client Data

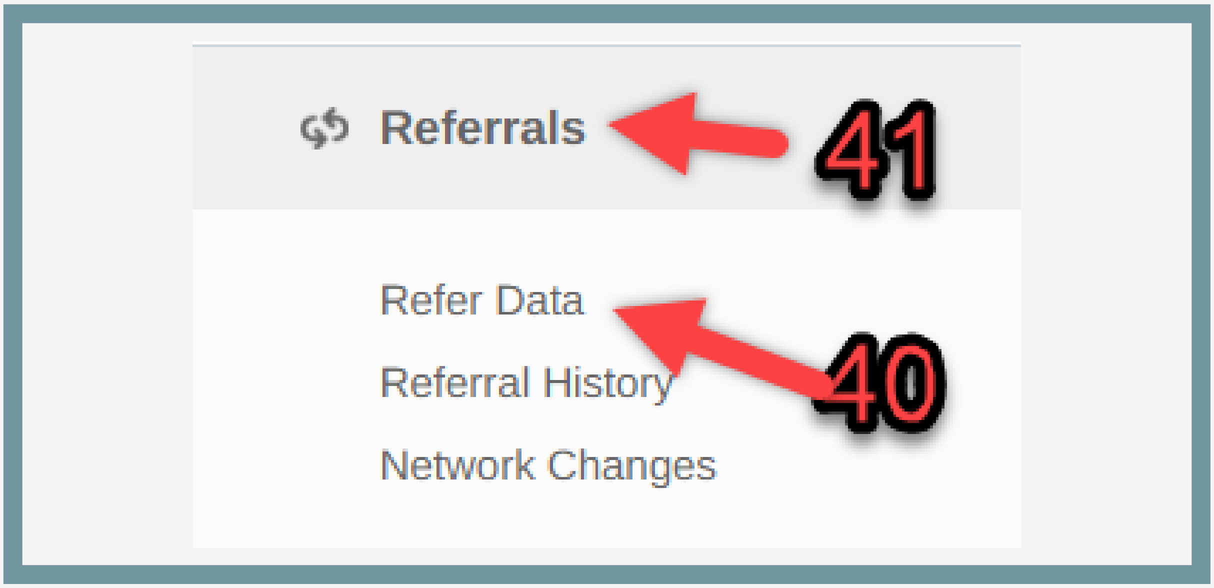
Steps 38-39



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

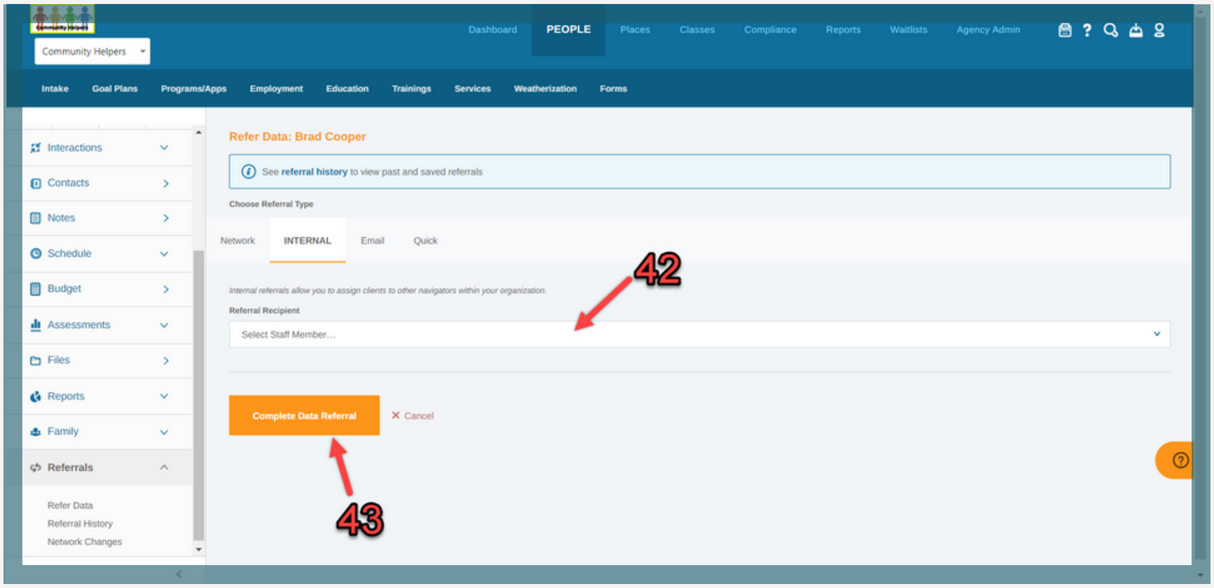
Steps 40-41



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

Tracking Client Data

Steps 42-43

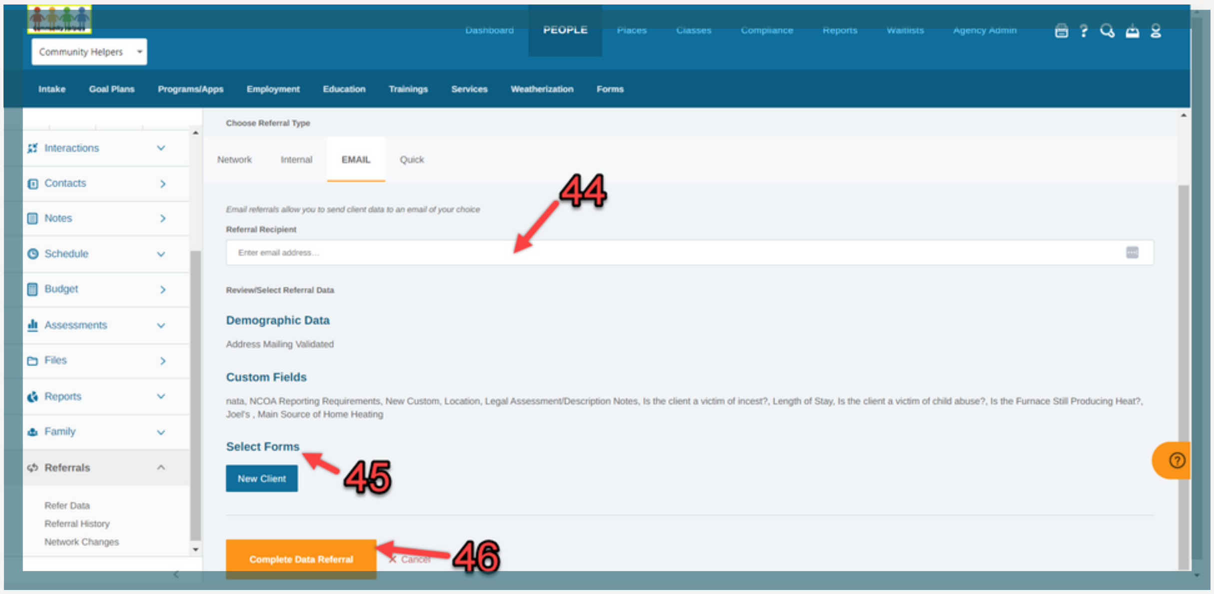


Refer Client Internally:

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

Tracking Client Data

Steps 44-46

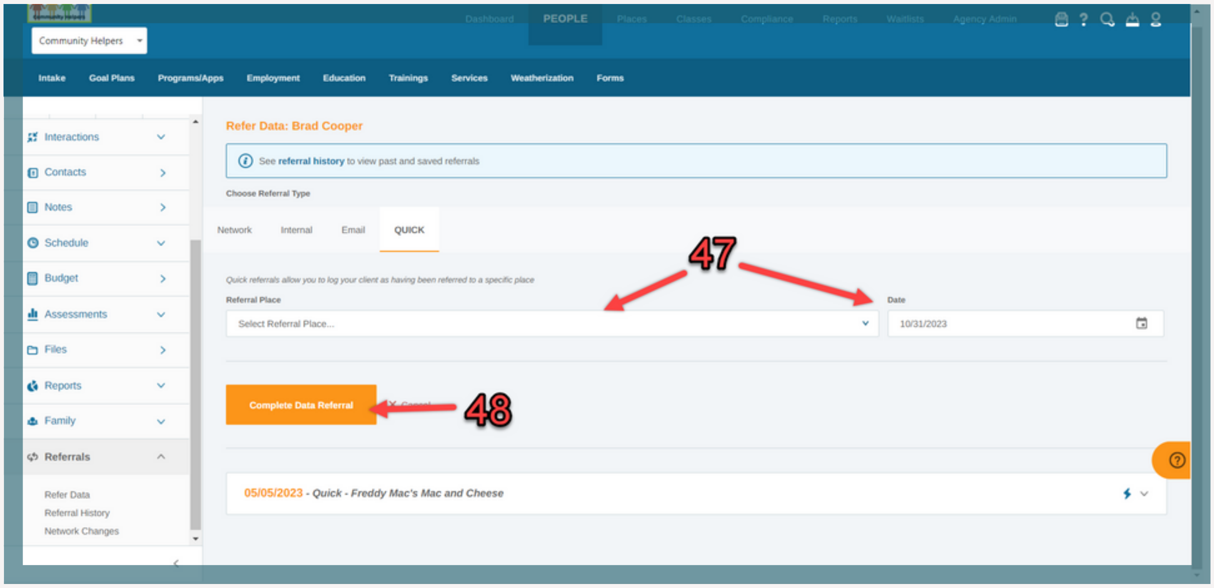


Refer Client via Email:

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



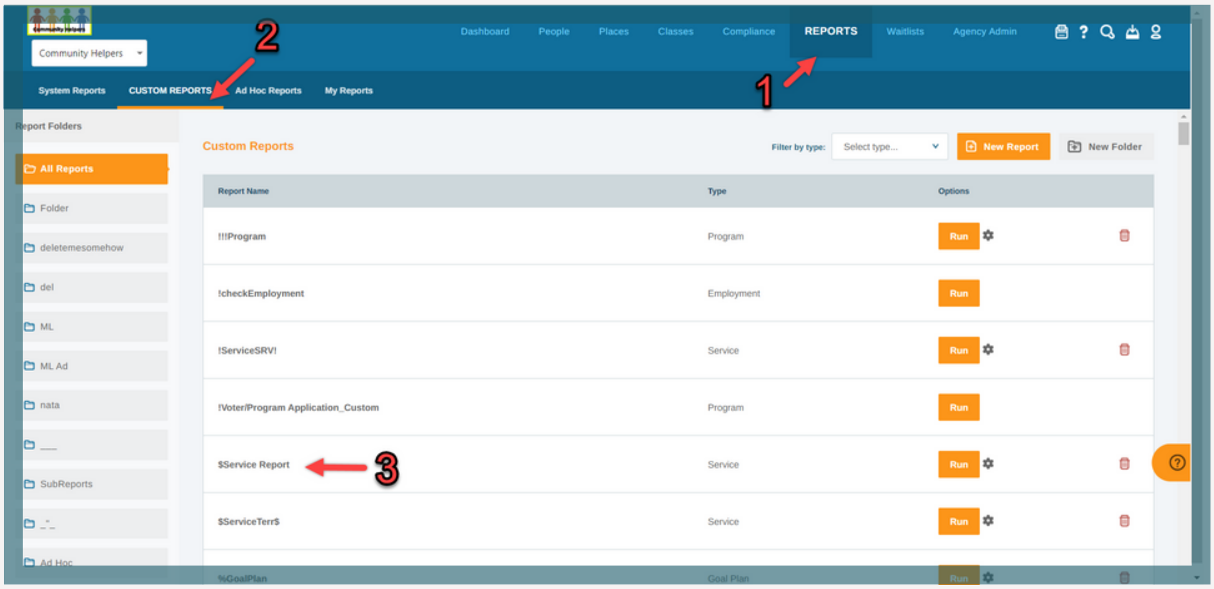
Document Quick Referral:

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

RUNNING REPORTS

Running Reports

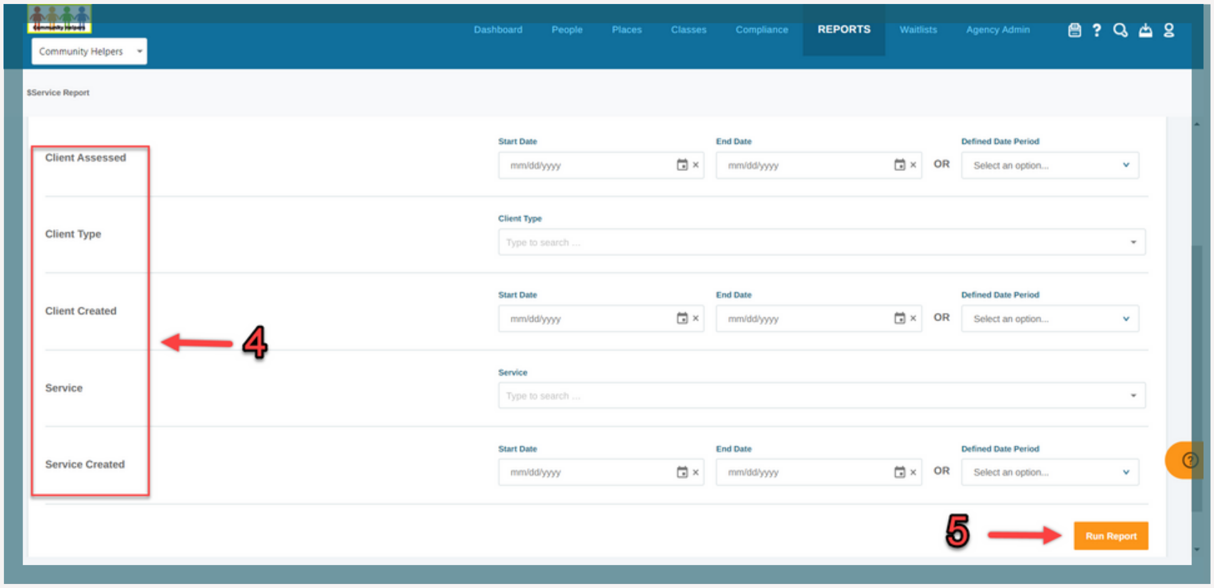
Steps 1-3



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

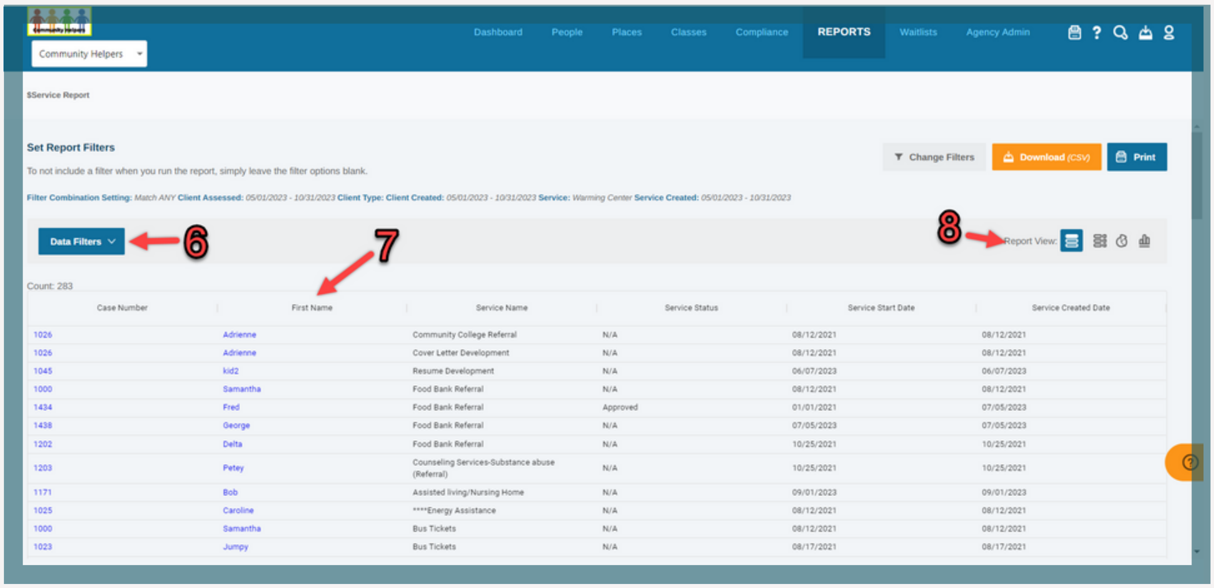
Steps 4-5



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

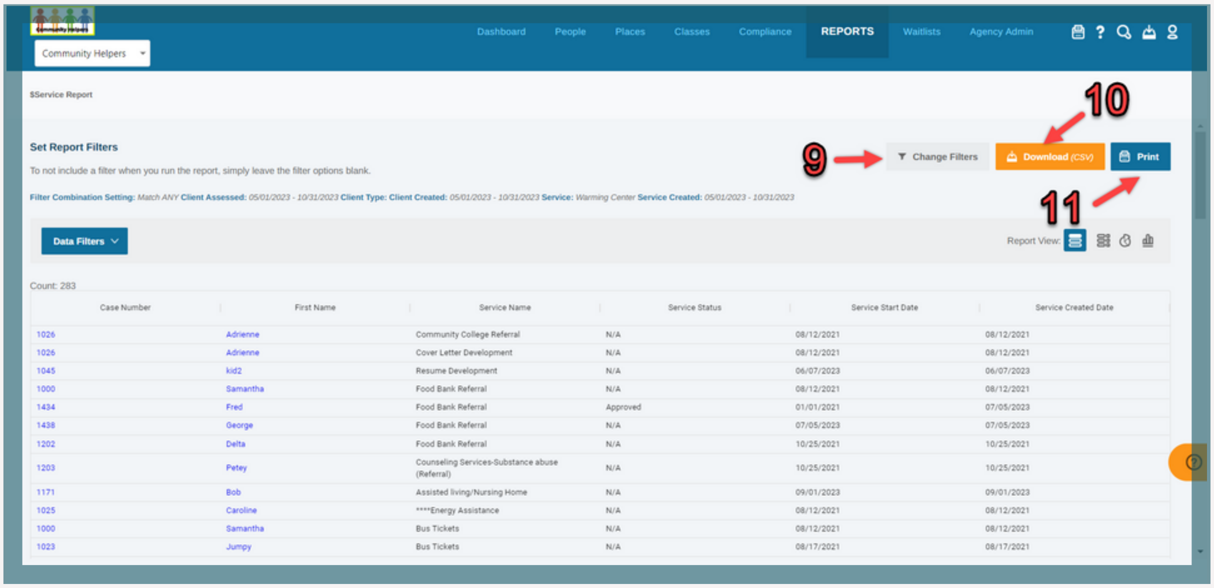
Steps 6-8



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



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!