

PRINT THESE TWO PAGES FOR STAFF – POST THE VERSION YOU LIKE BEST BY EACH COMPUTER

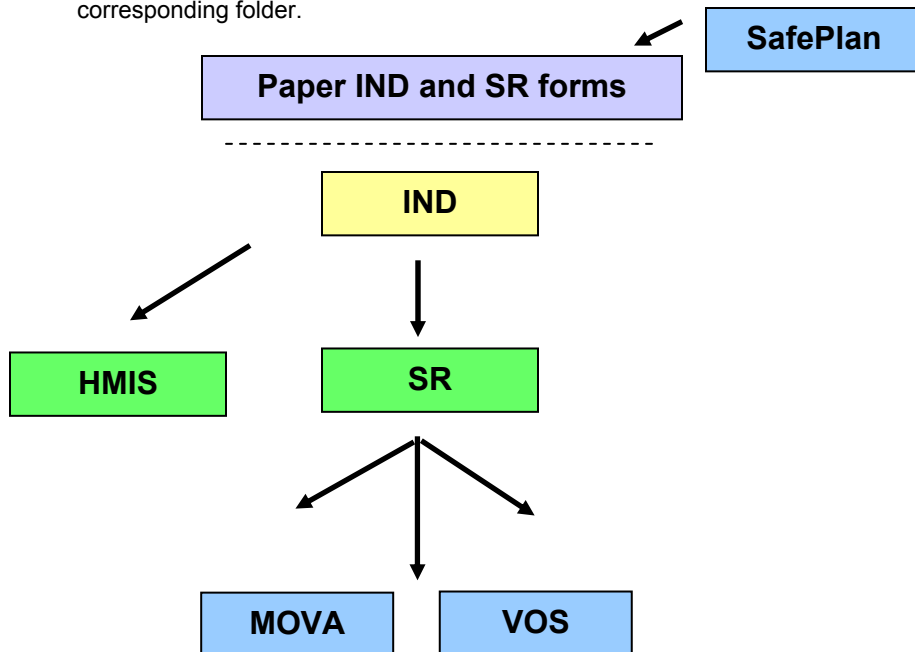
DATA ENTRY PROCEDURES – CHART ONE

INDIVIDUALS and HOUSEHOLDS DIRECTLY SERVED

As a required first step in all cases, open or create a client's IND Template. Complete or update the client's IND template before proceeding to the SR template and record any services provided. At the end of each month, after when the IND and SR templates are completely updated, you may then spawn any other templates and fill them out.

Each month you must revisit every IND form to at least change the month and/or year and to perhaps check boxes to indicate client has entered a new program or existed the agency. IF you fail to do both, your reports will show false numbers.

Remember to save all template immediately upon opening. using the client's ID as shown on that Template. The ending of the client's ID will be different on each template. And of course, each Template must be saved in the corresponding folder.



GROUP ACTIVITIES AND HOTLINE TRACKING

GRP

The GRP template is the only template you access without first visiting the IND. This is because it records group activities rather than information about a specific client.

Use the GRP Template to:

- record group sessions, or
- to access various items such as the ARF forms,
- access the hotline tracker forms

Each month, save and archive this form, as well as and any related subforms (for example, the extra pages of MSDR Table II).

The GRP template will get overwritten each month. If you want to archive each month's copy, be sure to save the form using a name that includes the year and month, in this order:

2006 01
2006 02
2006 03, etc.

By typing the year first, you avoid the files getting out of order, which would be a pain:

01 2006
01 2007
11 2006
11 2007
02 2006

DATA ENTRY PROCEDURES – CHART TWO

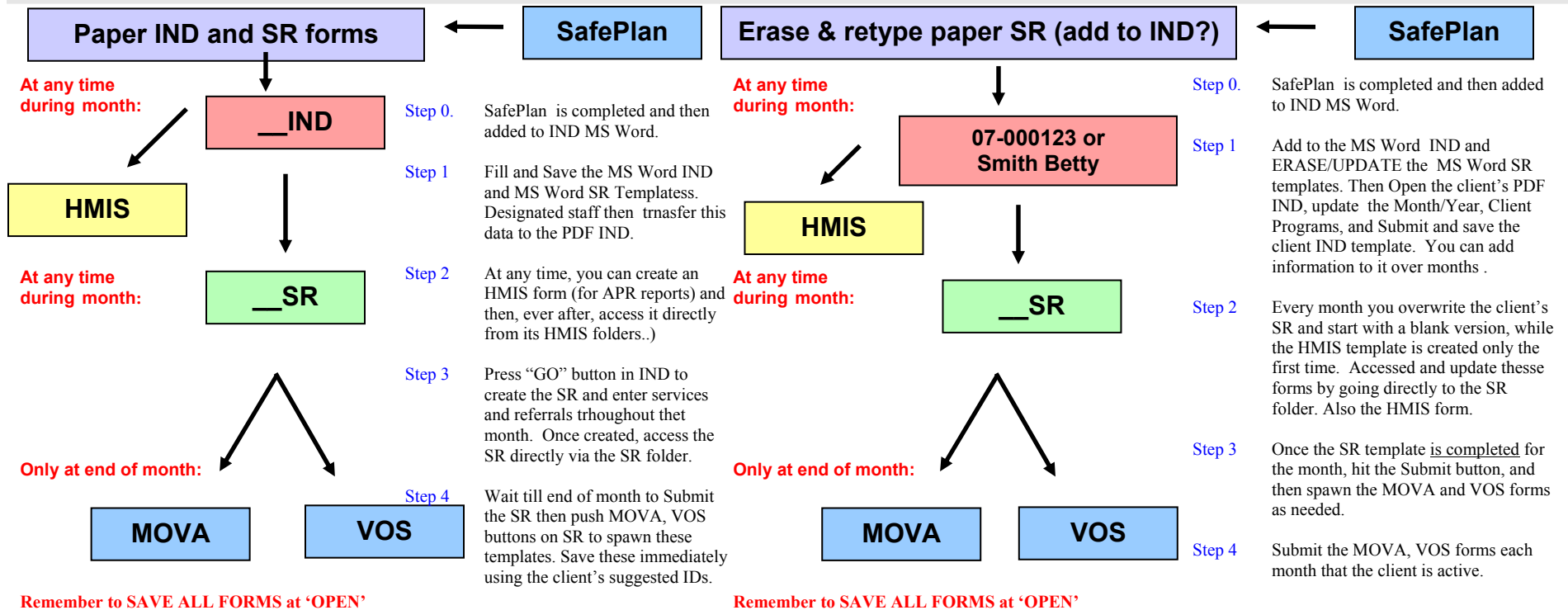
ENTERING DATA into the PDF FORMS

ALWAYS OPEN AND USE THE CLIENT TEMPLATES IN THE ORDER SHOWN:

(This sequence minimizes the data entry work, and lets you copy information from the first form to the later forms. It may require an overhaul of your staff process but it will save you time and helping you avoid mistakes.)

CREATING A NEW CLIENT

UPDATING CLIENT FILES = EXACT SAME SEQUENCE



GRP

The GRP template is used to record hotline calls and group activities, so will not contain any individual client's date