

Adding a Key Tag for Existing Client

Batman, Benny B

Last: Batman First: Benny Middle: B Suffix:

Homeless

Address 1: 222 Cave Ave. Address 2: Apt#, Lot#, etc

Zip Code: 88702 City: Cabot Cove State: PT County: Empire County

OPTIONAL Address Verified: No Yes

Main Phone: 2nd Phone:

No Phone Number

Family Size	1	Children	0	Adults	1	Seniors	0
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Family Notes:

Proxy:

Service Provided	Add Secondary Service	Date & Time	Optional Reporting	Reporting Event
Pantry - Choice - 3 day		04/26/2019 at 11:06 AM	(Show)	Pantry

First Name	Middle	Last Name	Suffix	Date of Birth	Age	Age Group	Gender	Identification	Status
Benny	B	Batman		01/01/1966	48	35 - 59	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	
Benny	B	Batman		01/01/1966	48	35 - 59	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive

Add Family Member

HOW DID THEY SIGN?

Signed Paper Form Not Required Required, NOT Signed

Alt ID Cards Face Sheet

SERVICE VISIT STATUS:

Reserved Served No Show Cancelled by Client Cancelled internal Duplicate void Rescheduled

1) In a new or existing client's daily record – click on the rectangular Alt IDs box to begin assigning their key tag.

Alt IDs:

"Take-a-Number" tracker (optional) Client's # in line -0 Choose Serving Status

Close Window & Add ANOTHER Service for this same family

Family Status New Family Previously Served

2) Next click on the green "Add Alt ID" box that is across from the person's name.

Close

First Name	Middle Name	Last Name	ID	Type	Status
Benny	B	Batman		Add Alt ID	
Benny	B	Batman			

"Take-a-Number" tracker (optional) Client's # in line -0 Choose Serving Status

Add Alt ID for Benny Batman

ID

ID

ID Type

Add Type

Cancel

Add ID

3) You do not need to select anything for "ID Type."

4) Place your cursor in the ID box and scan a new key tag. Most times the screen automatically processes the Alt ID and takes you back to the daily record seen in the first step.

5) However, if the page doesn't advance after scanning the card and populating the ID number in the correct box, select "Add ID" to manually advance the page.

The key tag has been assigned. To confirm, you can re-open the Alt IDs box from step 1. You'll now see the ID Number and Status of the card you just assigned. Don't worry about what "Type" says.

Close

First Name	Middle Name	Last Name	ID	Type	Status
Benny	B	Batman	12345	Other: Food Bank ID	<input checked="" type="radio"/> Active <input type="radio"/> Inactive
Add Alt ID					
Benny	B	Batman			

"Take-a-Number" tracker (optional)

Client's # in line -0

Choose Serving Status