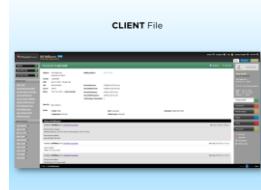
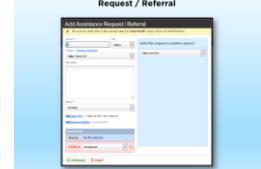


CharityTracker Walk-Thru

PowerPoint Presentation

Slides Notes

	<p>Login Page:</p> <p>Each “user” of CharityTracker must have their own unique log in which consists of an email address and password.</p> <p>Only network administrators (agencies) and agency administrators (agents) can grant access to the system.</p>
	<p>Home Page:</p> <p>Here is the screen everyone sees when they log into their CharityTracker account.</p> <p>(Top of Screen) Community Dashboard:</p> <p>This is a cumulative wide network total of the</p> <ol style="list-style-type: none"> 1. People served 2. Acts of Kindness 3. Dollar Amount of Assistance <p>(Middle of Screen) Bulletins:</p> <p>This allows you to enter a message to share with others in your network. All users in your network will also receive an email with message. Others can also respond to your bulletin with a message of their own.</p> <p>(Top Left of Screen) Search:</p> <p>You can search for a client here. We always suggest inputting their name in the search bar to see if they already have a case in the system.</p>
	<p>My Agency Tab:</p> <p>This tab can be found on the top right of the screen and allows you to personalize information about your agency like location, hours of operation, what type of assistance you can provide etc.... This will be visible to others on the network.</p>

	<p>Agencies:</p> <p>This tab allows you to see all the agencies that are in your network and info associated with them. Just like you have set up the info in your agency, other agencies can do the same and share with others as well.</p> <p>The (Services) sub-tab is a searchable directory of all the services that each agency provides.</p>
	<p>Client File:</p> <p>Each client case has 5 sections: Personal Info, Assistance, Relationships, Notes and Alerts.</p> <p>(Personal Info) tab keeps track of basic info for client including demographics. There is also a “history of modifications” which is a record of changes that have been made to info.</p>
	<p>Assistance tab keeps track of all assistance given to your client and those living with them. To add an assistance record, click “add assistance” button. After filling in the assistance info, you can choose to share the info with other agencies or keep it private to just your agency.</p>
	<p>Add Request/Referral button allows you to send info about a client’s needs to another agency, if your agency can’t assist or can provide only a portion of need. By using the “services feature” you can select an agency that may possibly be able to further provide help to client. The agency selected will receive an email sharing info about need.</p>
	<p>Relationships tab allows you to keep track of others associated with client based on household, living with and or related and that relation.</p>
	<p>Notes tab allows you to make a note on a client. You can choose to make this note visible to other agencies or keep it private to just your organization.</p>
	<p>Alerts tab keeps track of all alerts regarding your client. You can call attention to an emergency matter by posting an “Alert” to other agencies on your network. Example John Smith had a house fire and is in need of basic necessities.</p>

	<p>Outcomes: With this feature, you can set and keep track of specific goals in your client's life and proactively participate in goal completion.</p>
	<p>Client Info: (Adding A New Client) If a client comes into your agency and you search the network and their info and ROI hasn't been entered, then you will need to put their info into a new case and get the Release of Info signed before sharing with others in your network. There are three components of a "client info file": 1. Identification 2. Income and Expenses 3. Demographics</p>
	<p>Income and Expenses</p>
	<p>Demographics</p>
	<p>Release of Information (ROI) Once these fields are entered, you will be able to click on the "Verify ROI" tab. This will take you to the pre-populated form to print off and have the client sign. You must also sign the form verifying you witnessed agreement. You can also use an electronic signature pad to accomplish this, please <i>save to file</i>. Please save document for at least 3 years from ROI date.</p>
	<p>Reports: If you can record it into CharityTracker, you can report it. There are different reporting options as well including CSV, List and Table. If there is a report that you want to re-create over and over again, you can create a "Saved" report.</p>
	<p>Community Service Directory (New Simon Solutions Web-based Service) Works with CharityTracker Enables all agencies to post basic information about their services Enables general public to view information</p>