

Screening for Eligibility

1

From within the contact view, go to the “New Event” Dropdown menu.
Choose “A) Screening for Eligibility” and Click <New Event>

You will see the basic information for the event. Enter the following:

- Event Name
- Change contact to child's name
- Date screening took place
- Description (optional)
- Assigned to
- Status = Complete
- Closed

Click <Save>

After saving the event, you will have the ability to add the “Screening for Eligibility” form.

Screening for Eligibility

3 Enter the form

Event Edit Standard Summary ▼ Print Outlook **Event Details** Contacts Files

[Create Recurrence](#)

Event:

Contact: [Edit](#) Type: ▼

Date: (mm/dd/yyyy) Start Time: : : ▼

Remind me: days before this event. End Time: : : ▼

Minutes:

Description:

Assigned To
 ▼

[More Staff](#)

Notify me if not closed by: [Edit](#)

Status: ▼ Open/Closed: ▼ Access: ▼

Division ▼

Program ▼

Enrollment Date (mm/dd/yyyy)

Pre-Natal? ▼

Available Forms/Surveys [Create Eligibility Screening](#)

[Save](#) [Save & New](#) [Save & Close](#) [Cancel](#)

Copy Contacts
 Copy Event

Created: 4/19/2017 By: Amy Malone - enduser Modified: 4/19/2017 By: Amy Malone - enduser

Screening for Eligibility

Enter scores for the items applicable to the family. Suggested scores are noted. Administrators at each agency may decide to set their own values for individual lines, but this should be consistently applied across all screenings for that agency.

Eligibility Screening

IMPORTANT: Please click the **Save Changes** button below to save your entries before closing this window. You can return to complete the form later.

Save Changes

Event: Screening for Eligibility (3/6/2017)
 Contact: Jane Doe (JX)
 Subject: _____
 Date: 03/06/2017
 Type: N/A
 Public: Locked Unlocked
 Autosave

Page #1

1. Family is involved in domestic violence (5pts)
 (numbers only)
2. Family member has alcohol or substance abuse involvement (5pts)
 (numbers only)
3. Family member has a developmental delay (5pts)
 (numbers only)
4. Family has mental health needs (5pts)
 (numbers only)

4 Be sure to check <Autosave> when form opens and <Save Changes> before you leave or close this tab.

Save

Eligibility Screening Saved

[Return to Eligibility Screening](#)

5 You may return to Screening for Eligibility form to edit or print the completed form

Save Save & New Save & Close Cancel

Copy Contacts
 Copy Event

6 Close the forms tab, and <Save and Close> back on the Event tab

Note: If you serve multiple children from one family you will create a separate screening for eligibility event for each child being served.