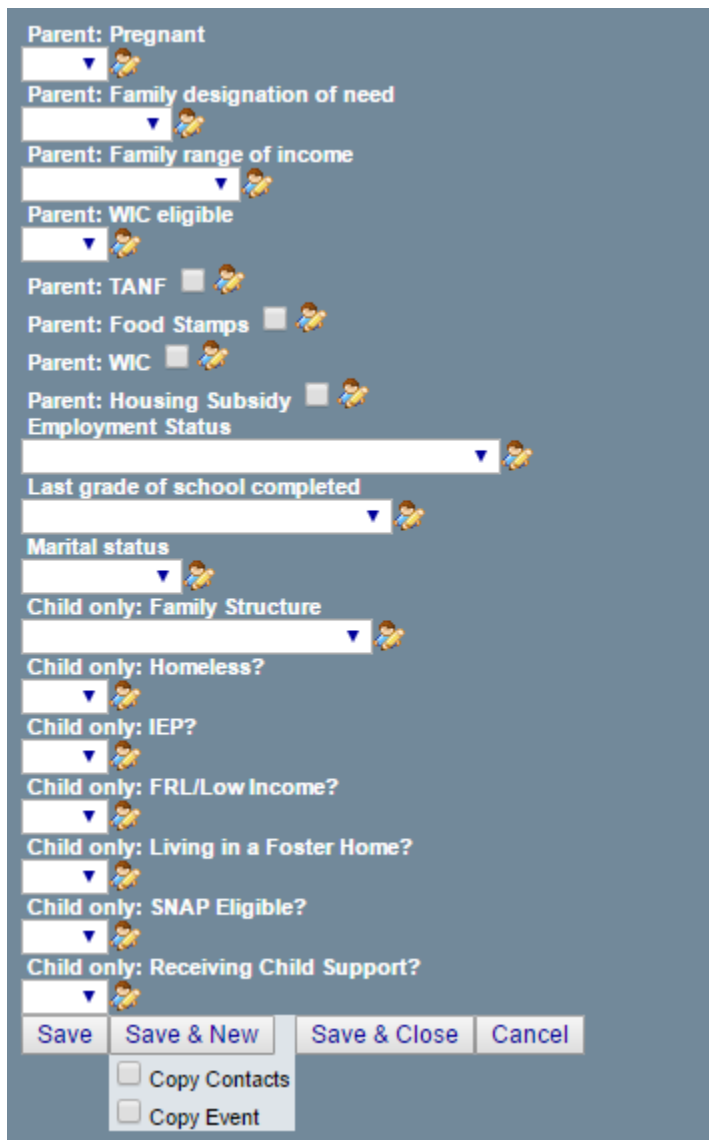


Update Family Member

Update Key Reporting Field Values

To ensure that the system will provide historical reporting based on key fields that may change over time, you must use an event, “Update Contact” in the system to make changes to the contact fields shown below. If, for instance, you need to report on number of families receiving services while experiencing homelessness in the previous quarter or year, the system will be able to find these families based on their status at that time. They may have since secured housing, so it is important that the change to homeless status is only ever updated within the “Update Contact” event and not directly on the contact record. All other fields on the contact record may be updated directly on the contact.



Parent: Pregnant

Parent: Family designation of need

Parent: Family range of income

Parent: WIC eligible

Parent: TANF

Parent: Food Stamps

Parent: WIC

Parent: Housing Subsidy

Employment Status

Last grade of school completed

Marital status

Child only: Family Structure

Child only: Homeless?

Child only: IEP?

Child only: FRL/Low Income?

Child only: Living in a Foster Home?

Child only: SNAP Eligible?

Child only: Receiving Child Support?

Save Save & New Save & Close Cancel

Copy Contacts

Copy Event

Update Family Member

You may update both the primary care giver and the child sub-contacts with the “Update Contact” event.

To update the primary contact

1 From within the contact view, go to the “New Event” Dropdown menu.
Choose “Update Contact” from the list of events.

2 Click on “New Event”

Contact View

Contact Code: JX Contact #92880 Active Save

Contact Info:
Jane Doe
Work Phone:
Home Phone:
Cell Phone:
Fax:
Role: Mother
Email:
Source: Another agency
Assigned To: UserId
Type: Individual

Print History Duplicates Face Sheet New Event

- 01) Personal Encounter
- 01) Personal Encounter
- 02) Group Encounter
- 03) Newborn Encounter
- 04) Prenatal Encounter
- 05) Personal Contact
- 06) Screening (Dev, Health, Vision, etc)
- 07) Family Resource Assessment
- 08) Family Service Plan
- 09) Referral
- A) Screening for Eligibility
- B) Child Enrollment
- C) Child Transition
- D) Child Exit
- Update Contact

More Contacts Events Donations/Payments Sub Contact Info Custom Fields Forms/Surveys Notes Mail Files

More Contacts Show Void Attach an Existing Contact New Contact

Sort by... Sort

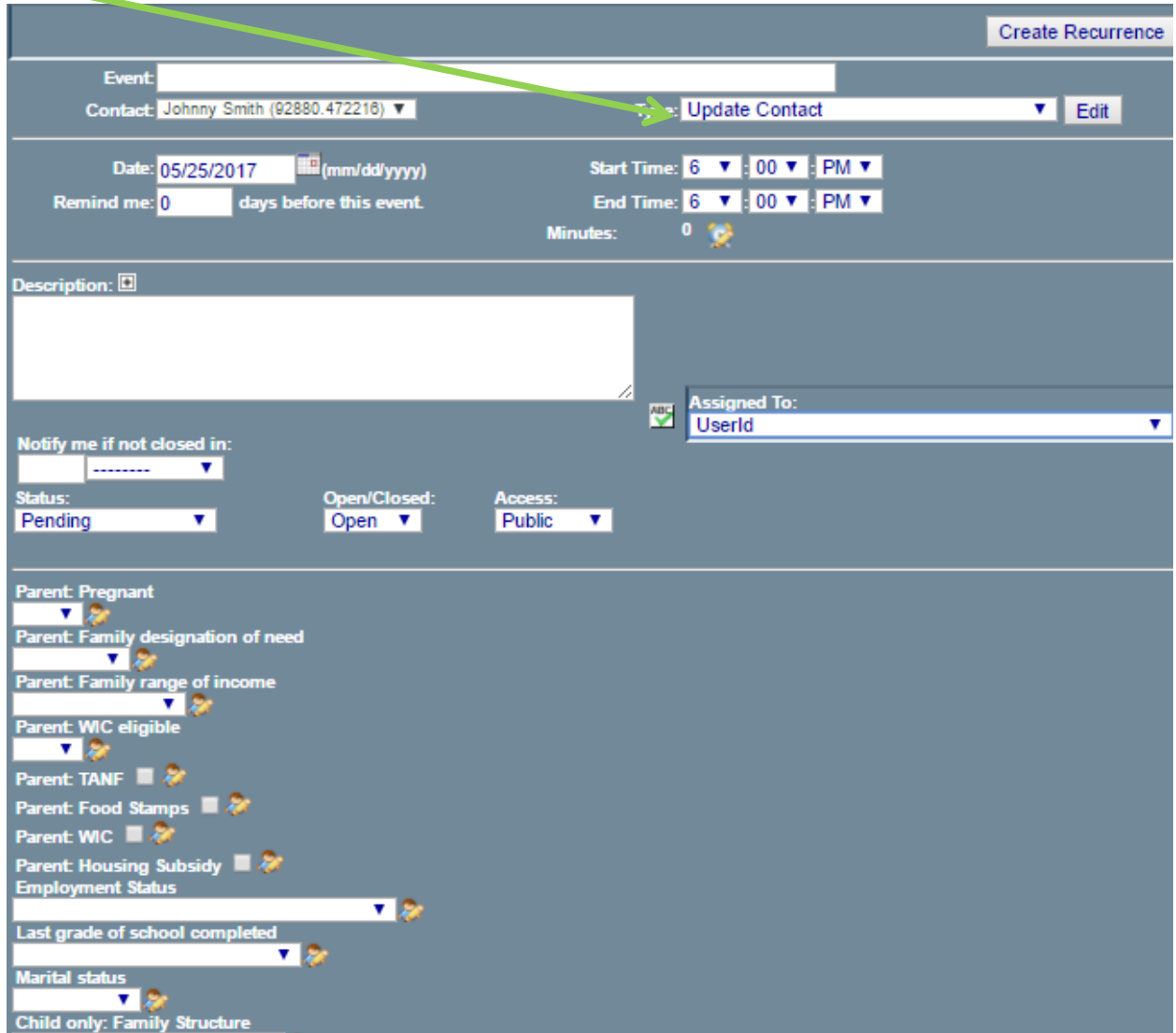
Name	Map	Address	Phone	Email	Assigned To	Role	Status	Created	Edit
Johnny Smith					UserId	Child	Active	5/19/2017	Event

3 To update the child/sub-contact, click on the “Event” icon

Update Family Member

If you are updating the primary contact, the event type will default. If you are updating the child, you need to change the event type from “01) Personal Encounter” to “Update Contact”

4



The screenshot shows the 'Update Family Member' form in the NewOrg Management System. The form includes the following fields and options:

- Event:** A dropdown menu currently set to 'Update Contact'. A green arrow points to this dropdown from a circle containing the number '4'.
- Contact:** Johnny Smith (92880.472216)
- Date:** 05/25/2017 (mm/dd/yyyy)
- Remind me:** 0 days before this event.
- Start Time:** 6:00 PM
- End Time:** 6:00 PM
- Minutes:** 0
- Description:** A large text area for entering details.
- Assigned To:** Userld
- Notify me if not closed in:** A dropdown menu.
- Status:** Pending
- Open/Closed:** Open
- Access:** Public
- Parent: Pregnant:** A dropdown menu.
- Parent: Family designation of need:** A dropdown menu.
- Parent: Family range of income:** A dropdown menu.
- Parent: WIC eligible:** A dropdown menu.
- Parent: TANF:** A checkbox.
- Parent: Food Stamps:** A checkbox.
- Parent: WIC:** A checkbox.
- Parent: Housing Subsidy:** A checkbox.
- Employment Status:** A dropdown menu.
- Last grade of school completed:** A dropdown menu.
- Marital status:** A dropdown menu.
- Child only: Family Structure:** A dropdown menu.

- Set the event date to the date on which the change occurred
- Make all of your updates
- Mark the event as “complete” and “closed”
- <Save & Close>

Update Family Member

Update all other non-key reporting field values

To update the primary contact fields

1

From within the contact view, click <Modify >

Contact View

Contact Code: JX Contact #9286... Active Save Add Flag

Contact Info: Jane Doe

Work Phone: Home Phone: Cell Phone: Fac: Source: Another agency Assigned To: UserId Type: Individual

Role: Mother Email:

Add an additional address Modify

More Contacts

Name	Map	Address	Phone	Email	Assigned To	Role	Status	Created	Edit
Johnny Smith					UserId	Child	Active	5/19/2017	

To update the sub-contact fields

2

Click <Edit>

Only make changes, as needed, to the fields you can see clearly below:

Update Contact

Contact Code: JX Assigned To: UserId Status: Active

Prefix: Jane Middle: Doe Last: Doe Suffix:

Work Phone: Home Phone: Cell Phone: Fax: Email: Allow Email: Blank (Send email to confirm consent) Password: Gender: Female Birth Date: (mm/dd/yyyy) Source: Another agency Type: Individual

Ethnicity: White/Non-Hispanic Language at home: English

Role: Mother Title: Company: Address: City: State/Prov: Zip/Postal Code: Country: Notes:

Save Cancel