

SECTION 500

ADDRESS BOOK

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SECTION 500: ADDRESS BOOK

501: Introduction

The **Address Book** function allows you to search for existing clients en masse rather than search for each client individually. In order to search for existing clients en masse, click on the **Address Book** tab and the following functions will be available:

1. **Summary View**; and/or,
2. **Client Address Book**.

Summary View - This function allows you to view all of your clients for a particular site/service or for all sites/services in one report. You will be able to Re-authorize, Un-authorize, Authorize and Hide the clients that are listed in this report. (See **Summary View** on page 5 - 3.)

Address Book - This function allows you to review clients alphabetically for a particular site/service or for all sites/services. By clicking on the clients name you will be on the **Client Information** page where you will be able to Re-authorize, Un-authorize and Authorize services for that client. (See *below for instructions on this function.*)

502: Address Book

1. In ClientTracker, click on the **Address Book** tab.
2. The **Client Address Book** page will appear. In the **Address Book Search Options** dialogue box under **Sites:**, click in the box next to the site (or choose **View All From Sites**) you want to enter client re-authorizations.
3. In the **Services:** content box, click in the box next to the service (or choose **View All Services**) you want to re-authorize.

Address Book Search Options will automatically default to show 10 clients per page. If you would like to change how many clients you want to see, use the drop down box next to the **Show: ___ clients per page** located in the **Address Book Search Options** dialogue box.

4. Below the **Address Book Search Options** dialogue box, click on the alphabet link that the client's last name starts with.

5. Below the **Address Book Search Options** dialogue box will be a listing of all of the clients that start with the alphabet link you chose. By clicking on the client's name (underlined/highlighted in green) link it will take to that client's **Client Information** page. (See **Section 900 - Client Information**)

At the bottom of the **Client Address Book** page, the report will tell you what page you are on and the **Total Records Found** for that search. To view additional pages, type the page number you wish to review in the box next to **Go To Page:**. Or you can click on the | button in order to view additional pages. Click on the ,, button to go to the last page of the report and click on the f button to go to the first page of the report.

503: Summary View

1. In ClientTracker, click on the **Address Book** tab.
2. The **Client Address Book** page will appear. In the **Address Book Search Options** dialogue box under the **Sites:** content box, click in the box next to the site (or choose **View All From Sites**) you want to view.
3. In the **Services:** content box, click in the box next to the service (or choose **View All Services**) you want to view.
4. In the **Address Book Search Options** dialogue box, click in the box next to **Use Summary View**. Click on the **Search** button.
5. The **Client Selection Criteria** dialogue box will appear on the **Client Address Book** page. The **Client Selection Criteria** contains the parameters you selected for the report in step 2 and 3. You can also revise your search by clicking on the **Revise Search Criteria**.
6. Below the **Client Selection Criteria** dialogue box is the **Client Address Book Summary View** content box. In the **Client Address Book Summary View** dialogue box, there are four (4) action buttons:
 - a. **Re-Authorize;**
 - b. **Unauthorize;**
 - c. **Authorize;** and,
 - d. **Hide.**

503.1: Re-authorize Clients

This function will update the client as active for the current fiscal year.

1. In ClientTracker, click on the **Address Book** tab.
2. The **Client Address Book** page will appear. In the **Address Book Search Options** dialogue box under the **Sites:** content box, click in the box next to the site (or choose **View All Form Sites**) you want to enter client re-authorizations.
3. In the **Services:** content box, click in the box next to the service (or choose **View All Services**) you want to re-authorize.
4. In the **Address Book Search Options** dialogue box, click in the box next to **Use Summary View**. Click on the **Search** button.
5. The **Client Selection Criteria** dialogue box will appear on the **Client Address Book** page. The **Client Selection Criteria** contains the parameters you selected for the report in step 2 and 3. You can also revise your search by clicking on the **Revise Search Criteria**.
6. Below the **Client Selection Criteria** dialogue box is the **Client Address Book Summary View** content box. In the **Client Address Book Summary View** dialogue box, there are four (4) action buttons:
 - a. **Re-Authorize;**
 - b. **Unauthorize;**
 - c. **Authorize;** and,
 - d. **Hide.**
7. Below the four (4) action buttons will be a listing of all of the clients previously authorized for the site(s)/service(s) you selected in step 2 and 3. The following information will be displayed:

Client Name	Social Security Number	Date of Birth
City	Site	Service
Authorization Date	Authorized for Current Fiscal Year (FY)	

8. Each client name is highlighted in green and underlined which indicates it is a link to that client's **Client Information** page. A blue asterisk next to the client name indicates that the client's information has not been viewed during the current fiscal year. It is imperative that all client information pages be viewed at least once a year to confirm that demographics, address, phone numbers, etc. are correct.
9. Select the client(s) you wish to **Re-Authorize** by clicking in the box next to the client(s) name. When you select the client(s), make sure you selected the appropriate service to be **Re-Authorized**. If several clients are chosen, they will all have the same **Re-Authorization** date.
10. After you have selected the client(s), click on the **Re-Authorize** action button.
11. Once you choose an action button, **Authorization Date Selection** window will appear. Select the date during the current quarter when the client was seen. Click on the **Save** button.
12. Once you click on the **Save** button, the **Client Address Book** page will contain a **Client Address Book Summary View - Exception Report** which will state one of the following:

Denied Re-authorization: If there is a reason the client can not be re-authorized for that service, the **Client Address Book Summary View - Exception Report** will describe the reason why the save was unsuccessful. If the client has already been authorized for the service during the current fiscal year, an **Exception Report** will be issued. (Remember, clients can only be authorized once for each service in each fiscal year. Service authorizations do not indicate how many times the client was seen.) **Exception Reports** will also be issued if the service requires a current assessment and the assessment in the database is out-of-date. If the **Re-authorization** was denied, go to the client's **Client Information** page to complete the **Registered Services** function. (See *Registered Services in Section 900.*)

OR

Successful Re-authorization: If the **Re-authorization** was successful, the **Client Address Book Summary View - Exception Report** will state 'The process ran successfully without any exceptions.'

13. In order to continue re-authorizing clients for other sites/services, click on the **Revise Search Criteria** link located in the **Client Selection Criteria** dialogue box on the **Client Address Book** page.

503.2: Un-authorize Clients

This function should only be used to unauthorize services in order to correct data entry error in the current quarter. Once the time period during which the client has been unauthorized is locked (such as the end of the quarter), the client can not be authorized through the **Address Book** function during the same fiscal year. Authorization for those clients must be completed through **Client Information** page under the **Registered Services** dialogue box. (See *Registered Services in Section 900.*)

1. In ClientTracker, click on the **Address Book** tab.
2. The **Client Address Book** page will appear. In the **Address Book Search Options** dialogue box under the **Sites:** content box, click in the box next to the site (or choose **View All From Sites**) you want to unauthorize clients.
3. In the **Services:** content box, click in the box next to the service (or choose **View All Services**) you want to unauthorize.
4. In the **Address Book Search Options** dialogue box, click in the box next to **Use Summary View**. Click on the **Search** button.
5. The **Client Selection Criteria** dialogue box will appear on the **Client Address Book** page. The **Client Selection Criteria** contains the parameters you selected for the report in step 2 and 3. You can also revise your search by clicking on the **Revise Search Criteria**.
6. Below the **Client Selection Criteria** dialogue box is the **Client Address Book Summary View** content box. In the **Client Address Book Summary View** dialogue box, there are four (4) action buttons:
 - a. **Re-Authorize;**
 - b. **Unauthorize;**
 - c. **Authorize;** and,
 - d. **Hide.**

7. Below the four (4) action buttons will be a listing of all of the clients previously authorized for the site(s)/service(s) you selected in step 2 and 3. The following information will be displayed:

Client Name	Social Security Number	Date of Birth
City	Site	Service
Authorization Date	Authorized for Current Fiscal Year (FY)	

8. Each client name is highlighted in green and underlined which indicates it is a link to that client's **Client Information** page. A blue asterisk next to the client name indicates that the client's information has not been viewed during the current fiscal year. It is imperative that all client information pages be viewed at least once a year to confirm that demographics, address, phone numbers, etc. are correct.
9. Select the client(s) you wish to **Unauthorize** by clicking in the box next to the client(s) name. When you select the client(s), make sure you selected the appropriate service to be **Unauthorized**. If several clients are chosen, they will all have the same **Un-authorization** date.
10. After you have selected the client(s), click on the **Unauthorize** action button.
11. Once you choose an action button, **Authorization Date Selection** window will appear. Select the date during the current quarter when the client should be un-authorized. Click on the **Save** button.
12. Once you click on the **Save** button, the **Client Address Book** page will contain a **Client Address Book Summary View - Exception Report** which will state one of the following:

Denied Un-authorization: If there is a reason the client can not be un-authorized for that service, the **Client Address Book Summary View - Exception Report** will describe the reason why the save was unsuccessful.

OR

Successful Un-authorization: If the **Un-authorization** was successful, the **Client Address Book Summary View - Exception Report** will state '**The process ran successfully without any exceptions.**'

13. In order to continue un-authorizing clients for other sites/services, click on the **Revise Search Criteria** link located in the **Client Selection Criteria** dialogue box on the **Client Address Book** page.

503.3: Authorize Clients

This function allows you to reverse an un-authorization during that current quarter.

1. In ClientTracker, click on the **Address Book** tab.
2. The **Client Address Book** page will appear. In the **Address Book Search Options** dialogue box under the **Sites:** content box, click in the box next to the site (or choose **View All From Sites**) you want to authorize clients.
3. In the **Services:** content box, click in the box next to the service (or choose **View All Services**) you want to authorize.
4. In the **Address Book Search Options** dialogue box, click in the box next to **Use Summary View**. Click on the **Search** button.
5. The **Client Selection Criteria** dialogue box will appear on the **Client Address Book** page. The **Client Selection Criteria** contains the parameters you selected for the report in step 2 and 3. You can also revise your search by clicking on the **Revise Search Criteria**.
6. Below the **Client Selection Criteria** dialogue box is the **Client Address Book Summary View** content box. In the **Client Address Book Summary View** dialogue box, there are four (4) action buttons:
 - a. **Re-Authorize;**
 - b. **Unauthorize;**
 - c. **Authorize;** and,
 - d. **Hide.**
7. Below the four (4) action buttons will be a listing of all of the clients previously authorized for the site(s)/service(s) you selected in step 2 and 3. The following information will be displayed:

Client Name	Social Security Number	Date of Birth
City	Site	Service
Authorization Date	Authorized for Current Fiscal Year (FY)	

8. Each client name is highlighted in green and underlined which indicates it is a link to that client's **Client Information** page. A blue asterisk next to the client name indicates that the client's information has not been viewed during the current fiscal year. It is imperative that all client information pages be viewed at least once a year to confirm that demographics, address, phone numbers, etc. are correct.
9. Select the client(s) you wish to **Authorize** by clicking in the box next to the client(s) name. When you select the client(s), make sure you selected the appropriate service to be **Authorized**. If several clients are chosen, they will all have the same **Authorization** date.
10. After you have selected the client(s), click on the **Authorize** action button.
11. Once you choose an action button, **Authorization Date Selection** window will appear. Select the date during the current quarter when the client was seen. Click on the **Save** button.
12. Once you click on the **Save** button, the **Client Address Book** page will contain a **Client Address Book Summary View – Exception Report** which will state one of the following:

Denied Authorization: If there is a reason the client can not be authorized for that service, the **Client Address Book Summary View –**

Exception Report will describe the reason why the save was unsuccessful.

OR

Successful Authorization: If the **Authorization** was successful, the **Client Address Book Summary View - Exception Report** will state 'The process ran successfully without any exceptions.'

13. In order to continue authorizing clients for other sites/services, click on the **Revise Search Criteria** link located in the **Client Selection Criteria** dialogue box on the **Client Address Book** page.

503.4: Hide Clients

This function will hide individual clients from the **Client Address Book Summary View** screen. You might want to use this function for clients who will definitely not be authorized during the fiscal year (i.e., they moved or died). Selecting **Hide** on this screen will not affect the ability to view the **Client Information** page when doing a client search.

1. In ClientTracker, click on the **Address Book** tab.
2. The **Client Address Book** page will appear. In the **Address Book Search Options** dialogue box under the **Sites:** content box, click in the box next to the site (or choose **View All From Sites**) you want to hide clients.
3. In the **Services:** content box, click in the box next to the service (or choose **View All Services**) you want to hide clients.
4. In the **Address Book Search Options** dialogue box, click in the box next to **Use Summary View**. Click on the **Search** button.
5. The **Client Selection Criteria** dialogue box will appear on the **Client Address Book** page. The **Client Selection Criteria** contains the parameters you selected for the report in step 2 and 3. You can also revise your search by clicking on the **Revise Search Criteria**.
6. Below the **Client Selection Criteria** dialogue box is the **Client Address Book Summary View** content box. In the **Client Address Book Summary View** dialogue box, there are four (4) action buttons:
 - a. **Re-Authorize;**
 - b. **Unauthorize;**
 - c. **Authorize;** and,
 - d. **Hide.**
7. Below the four (4) action buttons will be a listing of all of the clients previously authorized for the site(s)/service(s) you selected in step 2 and 3. The following information will be displayed:

Client Name	Social Security Number	Date of Birth
City	Site	Service
Authorization Date	Authorized for Current Fiscal Year (FY)	

8. Each client name is highlighted in green and underlined which indicates it is a link to that client's **Client Information** page. A blue asterisk next to the client name indicates that the client's information has not been viewed during the current fiscal year. It is imperative that all client information pages be viewed at least once a year to confirm that demographics, address, phone numbers, etc. are correct.
9. Select the client(s) you wish to **Hide** by clicking in the box next to the client(s) name. When you select the client(s), make sure you selected the appropriate service to **Hide**.
10. After you have selected the client(s), click on the **Hide** action button.
11. Once you choose the **Hide** action button, the **Client Address Book** page will contain a **Client Address Book Summary View - Exception Report** which will state 'The process ran successfully without any exceptions.'
12. In order to continue hiding clients for other sites/services, click on the **Revise Search Criteria** link located in the **Client Selection Criteria** dialogue box on the **Client Address Book** page.