

# ClientTouch<sup>®</sup> User Guide (Abridged)



For ClientTouch Version 3.2

This abridged edition of the ClientTouch User Guide contains all of the instruction steps of the full User Guide. It does not contain the tutorial “Let’s Do It!” exercises or the screen shot illustrations contained in those exercises. The full User Guide can be downloaded separately from the Social Work Software web site.

Social Work Software  
[www.socialworksoftware.com](http://www.socialworksoftware.com)

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## Introduction

ClientTouch is software to help your organization keep information on the clients served, and to provide summarizing reports about clients and services.

This User Guide consists of a brief Overview followed by a series of in-depth tutorials. The best way to learn ClientTouch is to work through the tutorials. You will be able to learn things this way that you would not know by using a trial-and-error approach in experimenting with the software.

The tutorials start off explaining things in great detail. Later tutorials provide information in somewhat less detail, under the assumption that you have gained some ClientTouch skills. For example, early tutorials explain exactly how to find and open a particular Person record. Later tutorials might simply ask you to open a particular Person record.

Toward the end of this User Guide there is a section that describes how to prepare ClientTouch for live use.

## Overview of ClientTouch

### ***Data***

Each person that your organization serves will have a record set up in ClientTouch. Data with regard to persons is maintained in a number of separate windows in ClientTouch.

The following types of data exist for a person:

- Basic information such as name and identification numbers.
- Household information, including:
  - Names and key characteristics of household members.
  - Address and shelter information.
  - Household finances (income and expenses).
- Demographic information, including:
  - General demographics, such as ethnic group and marital status.
  - Education and primary employment information.
- Health information, including:
  - General health condition and health care provider information.
  - Diagnoses and treatment centers.
  - Medications.
- Characteristics: This area allows miscellaneous traits to be indicated for a person.
- Case Notes: Freeform notes of varying lengths.
- Services information, including:
  - Referrals In: Records of other organizations referring the person to your organization.
  - Referrals Out: Records of your organization referring the person to outside agencies.
  - Enrollments: Records of the person signing up or registering for services from one or more social service programs.
  - Outputs: Records of the person receiving a good or service from your organization.

ClientTouch also keeps information (name, address, contact person, phone) on other organizations or persons involved in the individuals' lives. These other organizations include other agencies (for referrals in and out), medical providers (for health records), and economic organizations (for employment information). A master list of Organizations is maintained, and any one Organization record may be referred to by many person records.

## **Reports**

ClientTouch provides for the creation of summarizing reports. These reports provide counts and totals related to clients served and services provided. The types of reports are as follow:

- **Information Sheet:** Contains information on a single person. Settings can be adjusted to control how much information is printed. A full person record can be printed if desired.
- **Enrollment Reports:** Count and summarize the enrollments in a particular time period. Reports can be generated for the entire organization or for just a part of it, such as for a particular social service program.
- **Output Reports:** Count and summarize the outputs in a particular time period. Reports can be generated for the entire organization or for just a part of it, such as for a particular social service program.
- **Person Reports:** Reports that count and summarize persons enrolled, counting each person only once (sometimes called "Unduplicated Counts"). Settings can affect whether all persons or a subset of persons are counted.
- **Referrals In:** Reports that count and summarize the referrals in. Settings can affect whether all referrals or only a subset of referrals are reported.
- **Referrals Out:** Reports that count and summarize the referrals out. Settings can affect whether all referrals or only a subset of referrals are reported.

## **Administration**

Each organization should have a ClientTouch System Administrator and a backup to adjust the settings that control ClientTouch. Administration functions include the following:

- **Maintaining Selection Lists:** ClientTouch has many fields that are drop-down pick lists, where the user clicks a down arrow, is presented with a list of choices, and then clicks on the desired choice. For almost all such fields, the items listed on the drop-down list are under the control of the organization using ClientTouch. This function allows the maintenance of these lists.
- **Maintaining Income and Expense Categories:** This is actually a special type of selection list. In ClientTouch, a person's entire monthly budget can be recorded if desired. This function allows the organization to decide on the structure for this budget.

- **Maintaining Units, Programs and Resources:** This is another special type of selection list. A “Unit” is an organizational unit such as a location, center or department. Each Unit can have one or more Programs. A “Program” is a social service program, such as providing food to the hungry or providing special classes to those entering the work force. Each Program can have one or more Resources. A “Resource” is a good or service provided by your organization in your efforts to help a person. This function allows the setting up of what is sometimes called the “structure” of Units, Programs and Resources.
- **Maintaining Standard Output Sets:** ClientTouch has an “Easy Output” function that allows for the quick recording of multiple Outputs. This function allows for standard sets of these multiple outputs to be set up.
- **Maintaining Worker Records:** Each person who uses ClientTouch is set up with a Worker record. ClientTouch security rights are assigned through this function.
- **Performing Data Administration:** This function allows for batch updates of certain status information.
- **Maintaining Control Settings:** This function allows for the adjustment of certain settings that affect how ClientTouch works.
- **Updating the License:** When an organization licenses ClientTouch, or changes how many users are licensed to use ClientTouch, this function is utilized.

## Tutorials

This section is organized as a series of tutorials. Within each tutorial are a number of sections headed “Steps.” You can refer back to these steps at any time to remind yourself how to do a particular task in ClientTouch. The tutorials also contain sections with the heading “Let’s Try It!” These let you apply the steps to the sample data that comes with ClientTouch.

When you or someone in your organization first installs ClientTouch®, the installation program also installs a small amount of sample data. If you are using ClientTouch before any real or “live” data is entered, you can learn about ClientTouch by adding to, changing and deleting this sample data.

This section has a number of tutorials that rely upon the sample data. If your organization is already using ClientTouch with live data, then you will want to be careful not to change any of the real data as you learn ClientTouch.

### ***General Computer Terminology and Skills***

When the instructions say to “*click*” on something, it means that you should move your mouse so that the arrow on your screen is over that something, then press the left mouse button.

When the instructions say to “*double-click*” on something, it means that you should move your mouse so that the arrow on your screen is over that something, then press your left mouse button twice very quickly without moving or jiggling your mouse.

When the instructions say to “*right-click*” on something, it means that you should move your mouse so that the arrow on your screen is over that something, then press the right mouse button.

A “*field*” is a place on a computer window that displays data to you, or where you can type in data. Fields usually have a white background, and are on windows with gray or colored backgrounds.

You need to be able to go from one field to another. One sure-fire way to do this is to take your mouse and click in the field you want to go to. Another way that often works is to press the “Tab” key on your keyboard to go to the next field.

Whenever you want more information about a window in ClientTouch, press the “F1” key on your keyboard. A Windows Help file will open with information about the window you are on.

### ***Tutorial 1: Starting and Exiting ClientTouch***

Every time you use ClientTouch, you will need to start it and log in. This tutorial covers those tasks.

#### **Start ClientTouch**

##### ***Steps***

1. On your computer find the Windows Task Bar. This is usually at the bottom of your computer screen and has a Start button. Click the Start button. You will see a pop-up menu.

2. Point to “All Programs” (or on some computers, just “Programs”), and you will see a cascading menu of program groups.
3. Point to the program group “ClientTouch.” You will see another cascading menu of items associated with ClientTouch.
4. Within the cascading menu for ClientTouch, point to the item labeled “ClientTouch 3.” It will have an icon like the one shown below.



5. Click the ClientTouch icon. You will see a window that has the word “ClientTouch®” and also displays the version number.
6. Eventually you will see the “Login to ClientTouch” window.

## Login

ClientTouch comes with its own built-in security. What you can do in ClientTouch depends upon what ClientTouch security rights you have.

There is one user account built into ClientTouch, named “Supervisor.” The Supervisor account comes with full rights to all areas of ClientTouch. When you first receive ClientTouch, the Supervisor password is blank. One of the steps of preparing ClientTouch for live use is to change the Supervisor password to prevent others from using that account.

While logging in, note that the Login Name field is not case. For example, if your Login Name is “Chris”, then logging in with “chris” or “CHRIS” will work fine.

The Password field *is* case sensitive. For example, if your password is “service7”, then “Service7” or “SERVICE7” will *not* work. Make sure you do not have your “Caps Lock” on accidentally when you type your password.

## Steps

7. Open the Login window. One way to do this is by starting ClientTouch, as described in the previous section.
8. In the Login window, type in your Login Name.
9. Go to the “Password” field. One way to do this is to press the “Tab” key on your keyboard. Another way is to take your mouse and click inside the Password field.
10. In the Password field, type in your password. In the Login window it will display as a series of asterisks, so that no one can look over your shoulder and learn your password.
11. Click the Login button. If you typed in a correct User Name and Password, you will next see the ClientTouch Main window, shown below.

## **Exit ClientTouch**

This section describes how to exit the ClientTouch program.

### *Steps*

1. On the ClientTouch main window, on the main menu bar, click on the word “File.” You will see a drop-down menu.
2. On the drop-down menu, click “Exit.” ClientTouch will close.

## **Tutorial 2: Changing Your Password**

When you first get your Login Name for using ClientTouch, the password will be blank. You should set a password so that others cannot use your Login Name to gain access to ClientTouch. You can also change your password any time you wish. Some organizations have policies requiring that passwords be changed on a periodic basis.

## **Change Your Password**

### *Steps*

1. On the ClientTouch main window, on the menu bar, click on “File,” then on the drop-down menu click “Change Password...”.
2. Type in your old password, and your new password twice. Click the OK button.

## **Tutorial 3: Finding and Viewing ClientTouch Person Data**

ClientTouch allows you to keep a great deal of information on the persons served by your agency. You not only keep information on their identity, demographics, and household, but also on who referred them to your agency and the services you provided. Almost all the information is optional, which means that your organization can keep just the information it wants to keep.

This tutorial covers working with person data.

## **Find a Person Record Using Name or Phone Number**

Finding a person involves typing in some search criteria and letting ClientTouch find the persons who match that criteria.

You can use a single search field, or several at one time. If you use several, then ClientTouch will try to find the person records that match *all* of your search criteria.

Another flexibility is that you can type just part of a name if you do not know the full name. For example, if you do not know if the name is “Johnson” or “Johnston,” you can type just “Johns” in the Last Name field and ClientTouch will find all last names that begin with those five letters.

The search fields are not case sensitive.

### *Steps*

3. On the ClientTouch main window, click the Persons button.

4. You will see the Persons window. In the appropriate fields, type in whatever you know about the person whose record you are trying to find.
5. Click the Search button. You will see a list of persons who match your search criteria.
6. Make sure the black triangle at the left is pointing to the record you want. If it is not, you can click on that record. Then click the Open button.

### **Find a Person Record Using Quick-Open (ID Number)**

ClientTouch can be configured to try to open a person record automatically using the identification number of a person. ClientTouch comes configured to attempt a quick-open based upon Social Security Number. If needed, you or the person preparing ClientTouch for your organization can configure ClientTouch to do a quick-open based upon a different type of ID Number. The ID Number must have a set number of characters to be used with Quick-Open.

#### *Steps*

7. In the Persons window, type the identification number of the person you are looking for in the ID Number field. (ClientTouch will search for a person record with that ID Number. If it finds it, and there is only one such record, ClientTouch will open the record automatically.)

### **View Data in the Main Person Window**

If you have the appropriate security rights, you can view the data for a person.

#### *General Steps*

Using the process of finding a person, described previously, will open the main Person window for that person.

### **View Household Data**

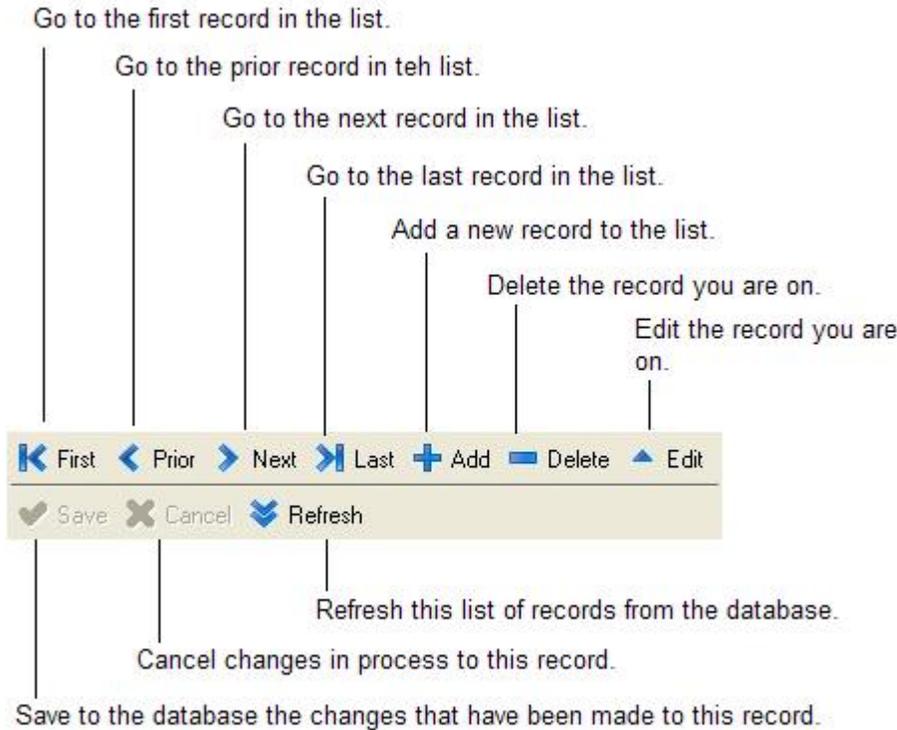
Household data consists of address and phone number, information on the type of shelter being lived in, information on household members, and information on household finances.

#### *Steps*

1. From the main Person window, click the Household button near the top of the window.
2. As needed, click on the window tab to go to a different “tabbed page” of a window.
3. In some cases you will see a list of rows, with one or more buttons above the set of rows. More information is provided in the next section titled “Navigate Multiple Rows Using Standard Buttons.” Also, clicking a Detail button will open a window with more information regarding that line.

### **Navigate Multiple Rows Using Standard Buttons.**

Throughout ClientTouch there are navigation buttons that are shown when there are multiple rows of data. One example of these navigation buttons appears above the ID Number list on the main Person window. The meanings of the navigation buttons are provided in the diagram below.



The first four buttons allow movement among the various records. You can also move among records by simply clicking on the record you want to select.

The button to add a record allows the addition of a new record. If the plus sign of the button icon does not have a blue dot (the one shown above does not have a blue dot), then the record will be added by simply adding a blank line to the list. You can then type the needed data in the blank line. If the plus sign has a square blue dot in the lower right corner of the plus sign, then when you click it a new window will open in which you can type the new data.

The delete button will delete the record you are on (the record pointed to by a black triangle on the left side). If you click this button, ClientTouch will give you a warning message and a chance to cancel before it completes the deletion process.

The Edit button puts the line into an “edit” mode, ready for changes. It is usually not necessary to click this button; if you just start typing in changes to data of an existing line, it will go into edit mode automatically.

If you do start editing a record, the Save and Cancel buttons will become active, not grayed out as they appear here. These allow you to save the changes you made, or to cancel them and revert to the way the record was before you started making changes.

The Refresh button gets the latest data from the ClientTouch database and displays it to you. It is rarely necessary to click this button.

## **View Demographic Data**

Demographic data consists of a number of miscellaneous characteristics about the person himself or herself. Education and employment information is also included in demographic data.

### *Steps*

1. From the main Person window, click the Demographics button near the top of the window.
2. As needed, click on the window tab to go to a different “tabbed page” of a window.

## **View Employment Records**

Employment records allow you to keep information on multiple instances of employment. Your agency can decide whether to keep information on only current employment, or to keep information on both current and past employment..

### *Steps*

3. From the main Person window, click the Demographics button near the top of the window.
4. On the Demographics window, click the Employment tab.
5. On the Employment tabbed page, click on the Employment record you want to see, then click on the Detail button.

## **View Health Data**

Health data consists of medical condition, health care provider information, diagnoses, medications, and emergency contacts. You may or may not be able to view health data, depending upon the security rights given to your Login Name.

### *Steps*

6. From the main Person window, click the Health button near the top of the window.
7. As needed, click on the window tab to go to a different “tabbed page” of a window.
8. In some cases you will see a list of rows, with one or more buttons above the set of rows. More information is provided in a previous section titled “Navigate Multiple Rows Using Standard Buttons.” Also, clicking a Detail button will open a window with more information regarding that line.

## **View Characteristics Data**

The Characteristics window lets you flag or mark a person record with any characteristics you want. This allows you to note traits for persons when there are no fields for those traits.

### *Steps*

1. On the main Person window, click the button for Characteristics.

## **View Case Notes**

Case Notes allow you to type freeform information about a person. A person record can have many Case Notes if needed, and each Case Note can contain a great deal of information.

Each Case Note is associated with a Unit, a Program, and a Case Note Type. A “Unit” is an organizational unit of your organization, such as a specific center, location, or department. A “Program” is a social services program, such as a program to provide groceries to the hungry or a program to help certain populations prepare to enter the work force. A “Case Note Type” is a way to categorize case notes. The master lists for all of these are set up by the ClientTouch System Administrator.

### *Steps*

1. On the main Person window, click the Case Notes button.
2. On the Case Notes window, scroll up and down to view all of the case notes.
3. If desired, click the Detail button to open a particular case note in a larger window.

## **View the Services Overview Window**

The Services Overview window, also called the Program-Related Overview window, allows you to see four types of records at once, to get an overview of service-related information for the client.

Each of these types of things (Referrals In, Referrals Out, Enrollments, and Outputs) is associated with a Unit and a Program. A “Unit” is an organizational unit of your organization, such as a specific center, location, or department. A “Program” is a social services program, such as a program to provide groceries to the hungry or a program to help certain populations prepare to enter the work force. The master lists for both of these are set up by the ClientTouch System Administrator.

### *Steps*

1. On the main Person window, click the Services Overview button.

## **View Referrals In**

A Referral In occurs when another agency or person refers a person/client to your organization.

### *Steps*

2. On the Program Related Overview window, position yourself on the Referral In that you want to see.
3. Click the Detail button for Referrals In.

## **View Referrals Out**

A Referral Out occurs when your organization refers a person/client to another organization.

### *Steps*

1. On the Program Related Overview window, position yourself on the Referral Out that you want to see.
2. Click the Detail button for Referrals Out.

## **View Enrollments**

An Enrollment is a record of a person's registration or signing up to receive services from your organization. An Enrollment can cover a long span of time.

### *Steps*

1. On the Program Related Overview window, position yourself on the Enrollment that you want to see.
2. Click the Detail button for Enrollment.

## **View Outputs**

An output is something that your organization gave out, either a tangible good or an intangible service. It is something your organization gave to a person (client) at a particular point in time.

### *Steps*

1. On the Program Related Overview window, position yourself on the Output that you want to see.
2. Click the Detail button for Output.

## **Generate an Information Sheet on a Person**

You can print an "Information Sheet" for a person record. This might contain some, part, or all of the information in ClientTouch about the particular person.

### *Steps*

1. On the main Person window, in the menu bar, click "File," then point and click on "Information Sheet Settings."
2. Adjust the settings to result in the type of report you want.
3. Click the Print Preview button. You will see the report preview in your screen.
4. Adjust the report preview window, if desired, by making it larger and/or by zooming in on the report. If the report has multiple pages, you can click the little black triangles to move forward or backward among the pages.
5. In the report preview window, click the Print button (it has an icon of a printer).
6. In the Print dialog box, make any adjustments such as selecting a printer, then click the OK button.

## **Generate an Emergency Contact Information Sheet for a Person**

You can print an “Emergency Contact Information Sheet” for a person record.

### *Steps*

1. On the main Person window, in the menu bar, click “File,” then point and click on “Emergency Contact Info Print Preview.” You will see the report preview in your screen.
2. Adjust the report preview window, if desired, by making it larger and/or by zooming in on the report.
3. In the report preview window, click the Print button (it has an icon of a printer).
4. In the Print dialog box, make any adjustments such as selecting a printer, then click the OK button.

## ***Tutorial 4: Adding and Changing ClientTouch Person Data***

If you have the appropriate security rights, you can add and change the data of person records.

### **Add a New Person Record**

As new persons are served by your agency, you will need to add new person records for those persons.

### *Steps*

1. The first step is to always try to find the person in the database. The record may already exist, and you don’t want to create a new record all over again (resulting in duplicate records). So try to find the person, as described in the prior tutorial. If you don’t find the person...
2. On the Persons window, click the “Add New” button. You will see the Person window with all fields blank except “(new)” in the last name field.
3. Type in the Courtesy Title, First Name, Middle Name, Last Name, and Name Suffix, if applicable.

### **Record an Enrollment**

An Enrollment is a record that a person has signed up or registered for services from your organization.

Enrollments also affect which Workers can view and/or change data for which Persons. If your organization is using detailed security that controls which Workers can work with which Person records, then Enrollments are important for this reason of security.

Due to its importance in security, you should add the Enrollment immediately after you create a new record and enter the new person’s name. This will help assure that you will be able to return to the new record later.

### *Steps*

1. On the Person window, click the Services Overview button.
2. On the Program-Related Overview window, in the Enrollments section, click the Add button.
3. On the Enrollment window, fill in the appropriate fields.
4. Close the window when done by clicking the “x” in the upper right corner.

## **Add an ID Number**

ClientTouch allows a person to have one or more identification numbers on file.

### *Steps*

1. In the area of the main Person window that has ID Numbers, click the Add button.
2. Click in the ID Number Type field to get a drop-down arrow. If it turns blue, click again to get the drop-down arrow.
3. Click the drop-down arrow and select an ID Number Type.
4. Press the Tab key on your keyboard to move to the ID Number field.
5. Type in the ID Number.

## **Use ID Number Auto-Assignment**

You can set up ClientTouch so that it will automatically assign a person a unique ID Number. The sample data is set up to do this with “HH Agency Number.”

### *Steps*

1. Follow steps 1 through 4 for adding an ID Number. If you use the ID Number Type that has been set up for auto-assignment, then step 5 will not be necessary because the number will be assigned and entered automatically by ClientTouch. (Note: In the sample Data “HH Agency Number” has been set up for Autonumber.)

## **Store the Photograph of a Person**

If you have the ability to create a digital photograph of a person, you can store that photograph with the person’s record in ClientTouch.

### *Steps*

1. Use whatever cameras, scanners, and software tools you wish to create a digital photograph of the person. Size the photograph so that the image is close to 121 pixels wide and 153 pixels high. Use your software tools to “Copy” the photograph to the “Windows Clipboard” See the documentation for your particular tools for instructions on how to do this.
2. In the main Person window, use your mouse pointer to right click on the photograph area.
3. On the pop-up menu, select “Paste from Clipboard”

## **Use Date of Birth, Age and “Is Minor” Fields**

If you key in a Date of Birth for a person, then the Age will automatically be calculated, and the checkbox for “Is Minor” will be automatically updated appropriately. (Note: You can put a check mark in “Is Minor” yourself if you do not know a person’s age but do know that they are a minor.) ClientTouch considers anyone under 18 years old to be a minor.

### *Steps*

1. On the main Person window, type the birth date in the field “Date of Birth”
2. On your keyboard, press the Tab key to move off the field. The person’s age will display. The field “Is Minor” will have a check mark appear if the person is under 18 years old.

## **Fill Out Other Fields on the Main Person Window**

This section describes most of the remaining fields on the main Person window.

### *Steps*

1. If a person uses or has used a different first name and/or different last name, type these in for Alternate First Name and Alternate Last Name. Select Type of Alternate Name from the drop-down list.
2. If a person uses another phone number besides the home phone number, type it if for Alternate Phone. Also type in the Alternate Phone Description.
3. If this person will be your main contact with the household, click on “Is Household Contact Person” to put a check mark in the box.
4. For “Relationship to Household Contact Person,” click the drop-down arrow and make the appropriate selection.
5. Click the drop-down arrows and make appropriate entries for Gender and Race.
6. The “Refer to Supervisor” field is a flag that can mean whatever you want it to mean. Some agencies use it to indicate that a person has been abusive or violent toward agency staff in the past. If you put a check mark in the “Refer to Supervisor” box, the words “REFER TO SUPERVISOR” will appear in the title bar of the window as a warning. These words will appear there each time that person’s record is opened.
7. The “Is Participant” field can mean anything your agency wants it to mean. (Having this box checked or unchecked does not affect ClientTouch processing in any way.)

## **Adjust Whether ClientTouch Counts Household Members**

You can have ClientTouch automatically keep track of how many adults and how many minors are in a person’s household. It does this based upon the Household Member records you add. As an alternative, you can tell ClientTouch that you will keep track of how many Adults and Minors are in the household, and enter those numbers yourself.

### *Steps*

1. Open the Household window.
2. If you want ClientTouch to keep track of the number of household members, make sure the checkbox marked “System Maintains Numbers of Adults and Minors” remains checked.
3. If you want to type in your own number of adults and minors, click the box to remove the checkmark from “System Maintains Numbers of Adults and Minors.” With this box unchecked, ClientTouch will let you change the numbers in the fields “Number of Adults in Household” and “Number of Minors in Household.”

## **Add a Household Member**

You can add one or more Household Members to a Person’s household. The records can have names, ID Numbers, and other key information.

### *Steps*

1. On the Household window, on the Household Members tabbed page, click the Add button. A new Household Member window will open.
2. Type in all appropriate information for the Household Member. Close the window when you are done.

## **Record the Address**

On the main Person window, you can see the address but you cannot change it. To enter or change an address, go to the Household window, to the “Address and Shelter” tabbed page.

ClientTouch has a special feature that lets you quickly enter the city, state, Zip Code, and county. This is the Quick-Fill Address feature. For example, if most of your clients live in one city, then that city name can be filled in using Quick-Fill. Other city names will need to be typed in.

Note: The “Address Top Line” field is for use in naming an institution or a building (for example, “Betty Ford Halfway House” or “Royal Oaks Apartments”). If this does not apply, just leave the field blank.

### *Steps*

1. On the Household window, click the “Address and Shelter” tab to go to the tabbed page with the address fields.
2. Type information into the address fields.
3. If Quick-Fill Address has been set up at your organization and is appropriate for this person, use Quick-Fill Address. Type a “q” (without the quotation marks) and tab out of a field for the Quick-Fill to occur. This works as follows:
  - “q” in the City field results in City, Sate and County being filled.
  - “q” in the State field results in the State being filled.
  - “q” in the Zip Code results in Zip Code being filled.
  - “q” in the County results in State and County being filled.

## **Record Household Finances, Demographics, Health, and Characteristics**

If you are using the steps of this tutorial as the normal method of entering a new person's record, now would be a good time to record household finances, demographics, health, and characteristics information. The windows that contain this information were viewed during the prior tutorial. Data entry on these screens works in a manner similar to what we have seen so far.

These windows have a number of fields where you select an organization from a drop-down pick list. For example, for the "Current or Latest School or College", you select a school or college from a drop-down list, and for "Primary Health Care Provider" you make a selection from a list of medical-related organizations. If an outside organization is not in the current list, you can minimize the current window, go back to the ClientTouch main window, and click the large Organizations button. A later tutorial in this User Guide explains how to add an Organization.

### *Steps (Overview)*

1. From the main Person window, click the button for Household, then click the Household Finances tab. Fill in the information.
2. From the main Person window, click the button for Demographics. Fill in information on both tabs of this window, then close the window.
3. From the main Person window, click the button for Health. Fill in information on the four tabs of this window, including adding any detailed information on medicine, then close the window.
4. From the main Person window, click the button for Characteristics. Add characteristics to the list as needed, then close the window.

## **Record Case Notes**

A Person can have one or more Case Notes, each of which can be many lines long if needed. ClientTouch automatically records who added the Case Note, as well as the date. Security settings for a Worker can be set so that the worker can change existing case notes, or so that the Worker is prevented from doing so.

Note: The Case Notes window will let you view multiple case notes. To change the number of case notes you see at one time, click "File" on the menu bar, then click "Set Number of Case Notes to Show," then set the number.

Note: ClientTouch has settings for each worker that determine if that worker can change a Case Note that has already been entered. The ClientTouch System Administrator has control of this setting.

### *Steps*

1. On the main Person window, click the button for Case Notes.
2. On the Case Notes window, click the Add button.
3. In the Case Note window, select Unit and Program if the defaults are not appropriate.

4. Set the Case Note Type field. This is simply a way of categorizing the case note.
5. The checkbox “Note Contains Personal Health Information” should be checked if the case note contains medical information about the person. This will mean that a user of ClientTouch will have access to this case note only if she or he has the security right that allows access to personal health information.
6. The large white area is where the note itself is typed. If needed, more information can be typed than can display in the window. The case note will hold all of the information, even if it is more than displays in the window. The information can be accessed by using the scroll bar.
7. Close the Case Note when it is complete.

### **Have a Household Member Move Out of a Household**

If a whole family moves from one address to another, you simply change the address on the Household window. It is a different situation if one member of a household moves out, leaving the rest of the household where it is. In this case, you will need this special function.

#### ***Steps***

1. Open the record of a person who is *not* moving out of the household. View that person in the main Person window.
2. Click the Household button to display the Household window.
3. In the Household window, on the Household Members tabbed page, click on the line of the person who is moving out of the household.
4. Click the Detail button.
5. On the Household Member window, on the main menu bar, click “File,” then click on “Move to Other Household...”
6. On the “Move to Selected Household” window, do one of the following:
  - If the person is moving out on his/her own to an entirely new household, click the button labeled “Move to New Household.” You will see a message asking you to confirm. Click OK to confirm.
  - If the person is moving to another established household and you already have that household in ClientTouch, then search for that other household, click your mouse on that line when you find it, then click the button labeled “Move to Household of Selected Person.” You will see a message asking you to confirm. Click the OK button to confirm that this is what you want.

## **Record a Referral In**

A Referral In occurs when another agency or individual refers a person to your agency. This is how you record it.

The Referral In window has a field, “Referral Source,” where you select an organization from a drop-down pick list. If an outside organization is not in the current list, you can minimize the Referral In window, go back to the ClientTouch main window, and click the large Organizations button. A later tutorial in this User Guide explains how to add an Organization.

### *Steps*

1. From the main Person window, click the button for Services Overview.
2. On the Program-Related Overview window, in the Referrals In section (upper left quadrant), click the Add button.
3. On the Referral In record, enter the appropriate information, then close the window.

## **Record an Output**

An Output is an instance of your organization providing a good or service to a Person. Here is how to record an Output.

One field in the Output window is Action. Your organization might be set up with these choices in its drop-down pick list:

- declined NA: Service declined. Good or service is not available now.
- declined NE: Service declined. Person is not eligible.
- planned: Service is planned for a later date.
- provided: Service was provided.

If you choose “planned” for the action, then once the output is actually provided you will need to return to this record and change the Action to “provided.”

### *Steps*

1. From the main Person window, click the button for Services Overview.
2. On the Program-Related Overview window, in the area for Outputs, click the Add button.
3. On the Output window, enter the appropriate information, then close the window.

## **Record a Referral Out**

A Referral Out occurs when you refer a person to an outside organization.

The Referral Out window has a field, “Referral Destination,” where you select an organization from a drop-down pick list. If an outside organization is not in the current list, you can minimize the Referral Out window, go back to the ClientTouch main window, and click the large Organizations button. A later tutorial in this User Guide explains how to add an Organization.

### *Source*

1. On the main Person window, click the button for Services Overview.
2. On the Program-Related Overview window, in the area for Referrals Out, click the Add button.
3. On the Referral Out window, enter the appropriate data, then close the window.

### **Set up for Easy Output**

The Easy Output functionality is a big help if you have clients who come in on a regular, periodic basis, such as every month or every week, and receive the same Output or set of Outputs each time. This section describes how to set up a Person to receive Easy Output.

Part of making Easy Output work is establishing Standard Output Sets. A later tutorial in this User Guide explains how to set up Standard Output Sets. This section explains how to link a Person with a Standard Output Set.

### *Steps*

1. Open the person's record in the main Person window.
2. At the bottom right of the window, click the drop-down arrow for "Standard Output Set." Select the appropriate Standard Output Set.

### **Record an Easy Output**

When you record an Easy Output, one or more Output records get added to the person. You are given a chance to change the information on the Output records if you wish.

ClientTouch has built into it a control that prevents Easy Outputs from being given out more often than they should be. Your organization's ClientTouch System Administrator can set this control. This is explained more in a later tutorial.

### *Steps*

1. On the main Person window, click the Easy Output button.
2. In the Outputs window, review the outputs to make sure all information is appropriate. Make any changes if needed, then close the window.

### **Use an External Document Pull-Up (For Example, with a Commodity Report)**

You can set ClientTouch so that, from within the Person record in ClientTouch, you click a button and an external document for that person will be opened. For example, the external document could be a Microsoft Word document or a Microsoft Excel document. If the external document does not exist, ClientTouch will create it based upon a template document.

This section shows how to implement External Document Pull-Up for a person if ClientTouch is configured to do this. (Information on how to configure ClientTouch to do this is presented later in this User Guide.)

Note: ClientTouch can be configured to refer to the external document by its specific name. In the sample data, ClientTouch is configured to refer to the external document as a Commodity Report.

### *Steps*

1. On the main Person window, put a checkmark in the field that is named for the external document.
2. In the lower right corner of the main Person window, click the button that is named for the external document.

## ***Tutorial 5: Backing Out of Adding or Changing Data***

Sometimes you might click a button to add some data, or might start changing data, and then realize that you don't want to make the addition or change. This tutorial shows you how to back out of these situations.

### **Back Out of Adding a Record**

If you clicked an Add button to add a record then realized that you didn't want to do that, here is how to back out of adding the record.

### *Steps*

1. Click the Cancel button.

### **Back Out of Changing Data**

If you start changing data in a window and have not yet left the window or clicked the Save button, you can usually back out of the changes you made.

### *Steps*

1. Click the Cancel button.

## ***Tutorial 6: Deleting Records in ClientTouch***

First, a note on nomenclature: In ClientTouch we sometimes refer to an Output record or a Medication record or some other piece of information about a person. These specific records occur when we can have more than one of something for a person. We also sometimes refer to the Person record as a whole. In this case, we are referring to the main person information as well as all the specific detail records about that person. From the context you can usually tell which type of record is being discussed.

Your organization may occasionally need to delete records in ClientTouch. For example, an Output record may have been entered in error, and need to be deleted. Or a duplicate Person record may have been entered by mistake, and the duplicate Person record needs to be deleted.

This tutorial describes how to delete both types of records.

Note: For safety purposes, this tutorial will delete only data that has been input in earlier tutorials. That way, if you are using Live data, you will not delete real data that your organization needs.

### **Delete a Detailed Record that is Part of a Person Record**

A Person record is made up of a number of smaller records. This section of the tutorial describes how to delete one of these smaller records.

#### *Steps*

1. Navigate to the window that shows the detailed record. If the record can be opened in its own window by clicking a Detail button, do so.
2. Click the Delete button.
3. On the confirmation message, click the OK button.

### **Delete an Entire Person Record**

Normally you should not delete an entire Person record. If a record gets entered in error, however, you can delete it using this process. You must have the proper ClientTouch security rights to delete a Person record.

Note: Deleting one person will not delete the other persons in that household. If you wish to delete the person record as well as all household members, you will need to delete each person separately.

#### *Steps*

1. Open the person in the main Person window.
2. Click the Delete button.

### ***Tutorial 7: Adding Organizations***

ClientTouch has a number of places where a Person record can refer to an outside organization. Some examples are Current or Latest School or College, Primary Employer, Primary Health Care Provider, Primary Pharmacy, Referral Source, and Referral Destination. ClientTouch keeps a master list of these outside organizations. Whenever you need to fill in one of the fields with an outside organization, you just click on a drop-down arrow and select the organization from a list.

If the organization you want isn't on the list, you can add it on the fly. This tutorial explains how.

### **Add an Organization**

Follow these steps for drop-down lists that hold organization names.

### ***Steps***

1. On the field that needs the Organization, click the drop-down arrow and try to locate the organization. You can also try to find the organization by typing the first few letters of the organization's name.
  - If you find the organization, click it to select it and you are done.
  - If you don't find the organization, go on to the next step.
2. Leave the window open and go to the main ClientTouch window. There are several ways you can do this:
  - Minimize ClientTouch windows until you are back at the main window.
  - Briefly tap the "Alt" key on your keyboard. The main window will come to the front.
  - Move windows around on your screen to make the main window visible. You can move a window by dragging it by its title bar at the top. ("Dragging" means to click and hold the left mouse button down while you move your mouse.)
3. On the main ClientTouch window, click the Organizations button.
4. On the Organizations window, search for the organization. (The organization may already exist, but not be marked as the type of organization used by the drop-down list.)
  - If you find the organization, click the Detail button to open it, then update the types of organizations to include this organization in the pick list, and finally close the windows.
  - If you do not find the organization, go on to the next step.
5. Click the Add button. It will open the Organization window.
6. Fill out the Organization window. Two points to keep in mind:
  - Set the Sort Name so the organization will be listed where desired in a drop-down list.
  - Check as many of the organization type boxes as is appropriate.
7. Close the Organization window.
8. Close the Organizations window.
9. Return to the window with the drop-down field and select the new organization.

### ***Tutorial 8: Creating ClientTouch Reports***

ClientTouch has a number of reports that let you summarize person data in various ways. This lets your organization get the counts and other statistics that can help when seeking funding.

The key to using the reports is to know what it is you want to count. For example, if the question is "How many people did our agency provide services for during the first half of the year?" then you want a "Person report." This is because what you are counting is persons, sometimes called "unduplicated counts of persons" On the other hand, if the question is "How many Enrollments did we have during the first half of the year?" then you want an "Enrollment report." Let's say that client Sally Smith enrolled in the Shelter program in January, then terminated in March, then enrolled in the Shelter program again in May, and terminated again in June. All of this will count for "1" on a Person report (there is one Sally Smith), but will count for "2" on an Enrollment

report (there are two enrollments, one with an Enrollment Date in January and one with an Enrollment Date in May).

Just to emphasize this point: If someone asks “How many people got Outputs of ‘PHP-Male’?” the inclination might be to say “Hmmm, PHP outputs... we need an Outputs report,” but this would be incorrect. What you want is a count of people, so you want a Person report.

In this section, we will start with Enrollment reports and Output reports to learn about these reports and about reports in general. We will then return to Case Note Reports and Case Note and Output Reports. We will then finish up with the remaining reports.

## **Generate Enrollment Reports**

An Enrollment report counts Enrollments. You first set report parameters that affect the content and format of the report. You can then view the report in print preview mode, and/or print the report.

### *Steps*

1. On the ClientTouch main window, on the menu bar, click “Reports,” then click “Enrollment Reports.”
2. On the Enrollment Reports window, type the title of the report in the Report Title field.
3. On the “What Enrollments to Count” tabbed page of the window, place checkmarks next to the fields that you want to use in selecting which Enrollments should be counted on the report. For each such field, type in the value that should be used when selecting records for the report. In some cases there are two fields for a range of values.
4. Click on the “Report Contents” tab.
5. Select what type of report you wish, “Counts” or “Cash Income Comparisons.”
6. If you wish to see individual records on the report, click the checkbox to put a check in “Show detailed records making up each count or comparison.”
7. If desired, set one or more fields to use for the Primary, Secondary, Tertiary, and Quaternary Count or Level.
8. Do one of the following:
  - a. Click the Print Preview button to view the report on screen. From the print preview window, you can then click the Print button if you wish, to bring up the Print dialog box.
  - b. Click the Print button to bring up the Print dialog box. If needed, adjust the Printer, Number of Copies, etc., then click the OK button.

## Generate Output Reports

An Output report counts Outputs. You first set report parameters that affect the content and format of the report. You can then view the report in print preview mode, and/or print the report.

### *Steps*

1. On the ClientTouch main window, on the menu bar, click “Reports,” then click “Output Reports.”
2. On the Output Reports window, type the title of the report in the Report Title field.
3. On the “What Outputs to Count” tabbed page of the window, place checkmarks next to the fields that you want to use in selecting which Outputs should be counted on the report. For each such field, type in the value that should be used when selecting records for the report. In some cases there are two fields for a range of values.
4. Click on the “Report Contents” tab.
5. If you wish to see individual records on the report, click the checkbox to put a check in “Show detailed records making up each count or comparison.”
6. If desired, set one or more fields to use for the Primary, Secondary, Tertiary, and Quaternary Count or Level.
7. Do one of the following:
  - a. Click the Print Preview button to view the report on screen. From the print preview window, you can then click the Print button if you wish, to bring up the Print dialog box.
  - b. Click the Print button to bring up the Print dialog box. If needed, adjust the Printer, Number of Copies, etc., then click the OK button.

## Generate Case Note Reports

A Case Note report prints Case Notes. You first set report parameters that affect the content and sorting of the report data. You can then view the report in print preview mode, and/or print the report.

### *Steps*

1. On the ClientTouch main window, on the menu bar, click “Reports,” then click “Case Note Reports.”
2. On the Case Note Reports window, type the title of the report in the Report Title field.
3. On the “What Case Notes to Print” tabbed page of the window, place checkmarks next to the fields that you want to use in selecting which Case Notes should be counted on the report. For each such field, type in the value that should be used when selecting records for the report. In some cases there are two fields for a range of values.

4. Click on the “Report Contents” tab.
5. Use the drop-down lists to indicate how the report data should sort.
6. Do one of the following:
  - a. Click the Print Preview button to view the report on screen. From the print preview window, you can then click the Print button if you wish, to bring up the Print dialog box.
  - b. Click the Print button to bring up the Print dialog box. If needed, adjust the Printer, Number of Copies, etc., then click the OK button.

### **Generate Case Note and Output Reports**

A Case Note and Output report prints Case Notes and Outputs together for the persons who appear on the report. You first set report parameters that affect the content and sorting of the report data. If your settings result in a Case Note or an Output within the parameters, then the person with that Case Note and/or Output will appear on the report. Under each person, all Outputs meeting the settings will be shown, and under that the Case Notes meeting the settings will be shown.

#### *Steps*

1. On the ClientTouch main window, on the menu bar, click “Reports,” then click “Case Note and Output Reports.”
2. On the Case Note and Output Reports window, type the title of the report in the Report Title field.
3. On the “What Case Notes and Outputs to Print” tabbed page of the window, place checkmarks next to the fields that you want to use in selecting which Case Notes and Outputs should be counted on the report. For each such field, type in the value that should be used when selecting records for the report. In some cases there are two fields for a range of values.
4. Click on the “Report Contents” tab.
5. Set whether you want to see Outputs in Summarized or Detailed fashion.
6. Do one of the following:
  - a. Click the Print Preview button to view the report on screen. From the print preview window, you can then click the Print button if you wish, to bring up the Print dialog box.
  - b. Click the Print button to bring up the Print dialog box. If needed, adjust the Printer, Number of Copies, etc., then click the OK button.

### **Generate Person Reports**

A Person report counts persons. This is also sometimes called an Unduplicated Counts report because each person is counted only once, even if they have multiple Enrollments or Outputs.

You first set report parameters that affect the content and format of the report. You can then view the report in print preview mode, and/or print the report.

***Steps***

1. On the ClientTouch main window, on the menu bar, click “Reports,” then click “Person Reports”
2. On the Person Reports window, type the title of the report in the Report Title field.
3. On the “What Persons to Count” tabbed page window, select Who to Count and the Ages to Include.
4. Click on the “What Enrollments to Select for” tab. If you want to count only persons who have certain types of Enrollments, Select either “Use Enrollments with specified values for selection,” otherwise select “Do not Use Enrollments for selection” If you select to use Enrollments, set parameters as appropriate.
5. Click on the “What Outputs to Select for” tab. If you want to count only persons who have certain types of Outputs, select “Use Outputs with specified values for selection,” otherwise select “Do not use Outputs for selection.” If you select to use Outputs, set parameters as appropriate.
6. Select the Report Contents tab. Select the Type of Report desired. If you are getting a Count report and detailed records should appear on the report, put a check mark in the box “Show detailed records making up each count.” If you are getting a Count report and you want groupings and subtotals, select as appropriate the Primary Count or Level, the Secondary Count or Level, the Tertiary Count or Level, and the Quaternary Count or Level.
7. Do one of the following:
  - a. Click the Print Preview button to view the report on screen. From the print preview window, you can then click the Print button if you wish, to bring up the Print dialog box.
  - b. Click the Print button to bring up the Print dialog box. If needed, adjust the Printer, Number of Copies, etc., then click the OK button.

**Generate Referral In Reports**

A Referral In report counts Referrals In (referrals from outside agencies to your agency). You first set report parameters that affect the content and format of the report. You can then view the report in print preview mode, and/or print the report.

***Steps***

8. On the ClientTouch main window, on the menu bar, click “Reports,” then click “Referral In Reports.”
9. On the Referral In Reports window, type the title of the report in the Report Title field.

10. On the “What Referrals In to Count” tabbed page, set report parameters as appropriate.
11. Click the “Report Contents” tab.
12. If you wish to see individual Referral In records on the report, click the checkbox to put a check mark in “Show detailed records making up each count or comparison.”
13. If desired, set one or more fields to use for the Primary, Secondary, Tertiary, and Quaternary Count or Level.
14. Do one of the following:
  - a. Click the Print Preview button to view the report on screen. From the print preview window, you can then click the Print button if you wish, to bring up the Print dialog box.
  - b. Click the Print button to bring up the Print dialog box. If needed, adjust the Printer, Number of Copies, etc., then click the OK button.

## **Generate Referral Out Reports**

A Referral Out Report counts Referrals Out (referrals your agency makes to other agencies). You first set report parameters that affect the content and format of the report. You can then view the report in print preview mode, and/or print the report.

### *Steps*

1. On the ClientTouch main window, on the menu bar, click “Reports,” then click “Referral Out Reports.”
2. On the Referral Out Reports window, type the title of the report in the Report Title field.
3. On the “What Referrals Out to Count” tabbed page, set report parameters as appropriate.
4. Click the “Report Contents” tab.
5. If you wish to see individual Referral Out records on the report, click the checkbox to put a check mark in “Show detailed records making up each count or comparison.”
6. If desired, set one or more fields to use for the Primary, Secondary, Tertiary, and Quaternary Count or Level.
7. Do one of the following:
  - a. Click the Print Preview button to view the report on screen. From the print preview window, you can then click the Print button if you wish, to bring up the Print dialog box.
  - b. Click the Print button to bring up the Print dialog box. If needed, adjust the Printer, Number of Copies, etc., then click the OK button.

## **Save a Report Archive File**

Reports can be saved into Report Archive Files. This allows you to do such things as e-mail a report to someone else. Archived reports can be viewed using a free utility, the Report Archive File Viewer. You are allowed to distribute the Report Archive File Viewer to other persons and organizations at no cost. Archived reports can also be viewed from within ClientTouch. This section describes how to save a report in a Report Archive File.

### *Steps*

1. Generate a report in one of the following ways:
  - a. Set parameters and click the Print Preview button. In the Print Preview window, click the Print button.
  - b. Set parameters and click the Print button.
2. On the Print dialog box, put a check mark in the “Print to File” checkbox.
3. In the “Where” field, do one of the following:
  - a. Type in a path and file name.
  - b. Click the button to the right of the field to open a Save As dialog box. Navigate to the folder where you want to save the report, type in a file name for the Report Archive File, and click the Save button.
4. On the Print dialog box, click the OK button.

## **View a Report Archive File**

See the beginning of the prior subsection, “Save a Report Archive File” (page 33), for a general introduction to Report Archive Files. This section describes how to view a report archive file in ClientTouch.

### *Steps*

1. On the ClientTouch main window, in the menu bar, click “Reports,” then click “Open Archive Report.”
2. If necessary, navigate to the folder that has the Report Archive File.
3. In the list of folder contents, click on the Report Archive File you want.
4. Click the Open button. You will see the report in print preview.

## ***Tutorial 9: Administering the ClientTouch System***

ClientTouch has a number of administrative functions that are covered in this tutorial.

Because we do not want to change any settings that affect how ClientTouch operates, the “Let’s Do It!” sections will only involve opening and closing the various windows.

## **Maintain Selection Lists**

Throughout ClientTouch, on various windows with information on persons, you often see fields with drop-down selection lists. This section describes how to maintain the choices on those selection lists.

Note: Some selection lists are maintained using other sections of ClientTouch administration. These are described in the tutorial in the upcoming sections on “Maintain Income/Expense Categories” (page 34), “Maintain Units, Programs and Resources” (page 35), and “Maintain Standard Output Sets” (page 36).

### *Steps*

1. On the ClientTouch main window, click “Administration,” then click “Selection Lists.” You will see the Selection Lists window.
2. On the Selection Lists window, click on the list in which you are interested.
3. Click the Detail button. You will see the items for that list open up in a separate window.
4. In the detailed window you can add, change and delete items. This will affect only what is presented in the drop-down lists. It will not affect the data in Person records.
5. Close the detailed window when you are finished maintaining the items.
6. Close the Selection Lists window.

## **Maintain Income/Expense Categories**

When setting up financial information on a household, you can build a budget made of income and expenses. You have control of how to categorize income and expense items. This section describes how to maintain those income and expense categories.

### *Steps*

1. On the ClientTouch main menu, on the menu bar, click “Administration,” then click “Income/Expense Categories.”
2. If you want to maintain an existing category, click on it, then click the Detail button to open the Income/Expense Category window for that category.
3. If you want to add a new category, click the Add button. This will open the Income Expense Category window, ready for entry of a new category and its items.
4. If you want to delete a category and all of its items, click the Delete button, then on the confirmation message click OK to confirm that you really want to delete the category and all its items.

5. When you work with the Income/Expense Category window for a particular category, you can maintain general category information in the upper part of the window. You can add, change and delete items in the lower part of the window.
6. Close windows when finished to return to the ClientTouch main window.

## **Maintain Units, Programs and Resources**

When using Enrollments, Outputs, Referrals In, Referrals Out, and Case Notes, you have an opportunity to set a Unit and Program that is appropriate for that Unit. In addition, when working with Outputs, you set a Resource that is dependent upon the Program. This section describes how to set up the master selection lists of Units, Programs and Resources.

Note: Maintaining Units, Programs and Resources here does not affect the data in the Person records that has already been recorded.

### *Steps*

1. From the ClientTouch main window, on the menu bar, click “Resources,” then click “Units, Programs, Resources.” This will display the Unites window, a list of Units.
2. On the Units window, you may do one or more of the following:
  - a. Click on a Unit and then click the Detail button, to see the detail for the Unit.
  - b. Click the Add button to open a Unit window to add a new Unit.
  - c. Click the Delete button, then click OK on the confirmation message to delete a Unit and all its Programs and Resources.
3. On the Unit window, the Unit is in the top half of the window and the Programs for the Unit are listed in the lower half of the window. In the lower half, you may do one or more of the following:
  - a. Click on a Program and then click the Detail button, to see the detail for the Program.
  - b. Click the Add button to open a Program window to add a new Program.
  - c. Click the Delete button, then in the confirmation message click the OK button to delete the Program and all of its Resources.
4. On the Program window, the Program is in the top half of the window and the Resources for the Program are in the bottom half of the window. In the lower half, you may do one or more of the following:
  - a. Click on a Resource and then click the Detail button, to see the detail for the Resource.
  - b. Click the Add button to open a Resource window to add a new Resource.

- c. Click the Delete button, then in the confirmation message click the OK button to delete the Resource.
5. On the Resource window, you can maintain Resource information.
6. When finished, close any open windows to return to the ClientTouch main window.

### **Maintain Standard Output Sets**

A Person record can be set up to receive a particular Standard Output Set with the click of a button. A Standard Output Set is one or more Outputs with settings for Unit, Program, Action and Resource already filled in. This section describes how to set up Standard Output Sets.

#### *Steps*

1. In the ClientTouch main window, on the menu bar, click “Administration,” then “Standard Output Sets.” The window lists all Standard Output Sets.
2. To see the detail on an existing Standard Output Set, click on it, then click the Detail button. The Standard Output Set window will open with that set’s data.
3. To add a new Standard Output Set, click the Add button. The Standard Output Set window will open, ready for entry of a new set.
4. To delete a Standard Output Set, click the Delete button, then on the confirmation box click the OK button.
5. When you are on the Standard Output Set window for a particular set, the name of the set is in the upper part of the window, and the lower part of the window contains one or more entries of what you want generated as outputs from this Standard Output Set. You can add, change, and delete these entries that generate Outputs.
6. When finished, close all windows to return to the ClientTouch main window.

### **Perform Batch Update**

The Batch Update function goes through the data, updating the “Is Minor” field of persons based upon their Date of Birth and the “As Of Date” that you enter when performing this function.

If you run this function once each month before doing monthly reports, then reports that select for a person to be a minor or adult, and reports that summarize by the “Is Minor” field, will be more accurate.

#### *Steps*

1. On the ClientTouch main window, on the menu bar, click “Administration,” then click “Data Administration.”
2. Click the Batch Update button.
3. Type in an appropriate “As of Date.”

4. Click the “Update ‘Is Minor’ Field” button.
5. Close windows to return to the ClientTouch main menu.

## Perform Data Synchronization

Data Synchronization allows you to take the data of two different ClientTouch databases and synchronize them. Here are a couple examples:

- If one database has a person (client) record that the other database does not, then after the synchronization both databases will have the client record.
- If both databases have the same person record due to a prior synchronization, and the client record has been updated in one of the databases but not in the other, then after the synchronization the person record in both databases will reflect the update.

It requires special setup to prepare databases for synchronization. Additional information can be obtained from Social Work Software.

For the steps involved in performing Data Synchronization, contact Social Work Software.

If you initiate synchronization and have not performed the proper setup for synchronization, you will see one of the following error messages :

“Files have not been properly set up for data synchronization. Please perform the setup and try again.”

“Error 5004: Either ACE could not find the specified file, or you do not have sufficient rights to access the file. The data dictionary file is not found on the server.”

## Adjust Control Settings

This describes how to adjust certain control settings that affect how ClientTouch works.

### *Steps*

1. On the ClientTouch main window, click “Administration,” then click “Control Settings.”
2. The “Licensee” tabbed page can hold the address and phone number of the organization that has licensed ClientTouch. Note: The Licensee Name appears in bold, and is updated through the “Update License” function, described on page 38.
3. Click the “Auto Fill” tab. The upper two-thirds of this page control what address items get filled in automatically with the address quick fill feature. The lower part of this page controls which ID Number Type will have ID Numbers automatically generated.

4. Click the “Easy Output” tab. This shows the minimum number of days since the last output for an Easy Output to occur. This is to prevent accidentally giving too many Easy Outputs. Theoretically if you want a person to receive an Easy Output only once a month, you would set this to “30”. In practice, though, we recommend setting it to something less than 30, to allow some variation of the days you give Easy Outputs. This allows for giving an Easy Output a little early to allow for holidays, etc. If you give an Easy Output to a person weekly, the theoretical setting would be “7” but we recommend something less than that, again to allow variation.
5. Click the “External Document” tab. ClientTouch can generate and/or open a specified type of external document for each Person. These settings control how this works, and includes the name of the External Document. (In the sample data that comes with ClientTouch, the Person main window has a button named “Commodity Report.” The button has that name because it is set here.)
6. Click the “General” tab. This merely leads to the “Additional Settings” button. Click the “Additional Settings” button. This opens the Settings window. One or more miscellaneous settings can be set here.
7. Close the Settings window.
8. Click the OK button on the Control Settings window.

## **Update License**

When you license the use of ClientTouch, you will use the Update License facility. You must have a License Number from Social Work Software to update the license.

### *Steps*

1. License ClientTouch and receive the License Number from Social Work Software.
2. On the ClientTouch main window, click “Administration,” then click “Update License.”
3. Type in all information.
4. Click the “Update License” button.
5. Store your license information in a safe, secure place.

## **Reset Supervisor Password**

If you set a password for the “Supervisor” login Name, then forget the password, this function allows you to reset the Supervisor password to blank. You must have all three parts of the License Number for your current license to reset the password.

### *Steps*

1. Find the license information for your agency’s license of ClientTouch.

2. On the ClientTouch main window, click “Administration,” then click “Reset Supervisor Password.”
3. Type in the three parts of the License Number.
4. Click the “Reset Password” button.

### ***Tutorial 10: Setting Up ClientTouch Security***

As you know, you must login to ClientTouch to use it. Each login Name has some security rights that allow it to perform certain functions in ClientTouch. Login Names can be set up with greater or lesser security rights, depending upon the needs of the person logging in.

#### ***Background Concepts***

A “worker” is an employee or volunteer who works at your organization. A particular worker might or might not be set up to have security rights to use ClientTouch. (Even if a Worker does not use ClientTouch, you might want to set up a Worker record so that the worker’s name will be in the selection list for Referrals In, Referrals Out, Enrollments, and Outputs.)

Some security settings are checkboxes. For example, if the “Can Run Reports” checkbox is checked on a Worker record, then that worker can run the various summarizing reports. If the “Can Run Reports” checkbox is not checked, then when that worker logs onto ClientTouch, almost all the items under the “Reports” menu will be grayed out and therefore not available. (The ability to read an Archive Report File will not be grayed out.)

Other security settings are “security scopes.” For a particular type of data, a certain scope is set. The possible scopes are:

- Can do nothing
- Can List: Can see something listed, without being able to see its details.
- Can List View: Can see something on a list and can view its details, but cannot make change to it.
- Can List View Add Change: Can see something on a list, can view its details, can add new things of the same type, and can change the data for things that already exist. Cannot delete.
- Can List View Add Change Delete: Can do everything, including delete an item.

On a worker’s record, there is a set of Minimum Security Scopes that is set for Person data in general, for the Personal Health Information of a person, and for Program-Related Information of a person. Personal Health Information consists of the information on the Health window, and also includes Case Notes that have been marked as containing Personal Health Information. Program-Related Information consists of the records that have “Program” as a field. Examples include Case Notes, Enrollments, Outputs, Referrals In, and Referrals Out.

Each worker can also have one or more Assignments. An Assignment allows greater “security Scope” for Person records where the person is enrolled in a particular program.

*Steps*

1. On the ClientTouch main window, click “Administration,” then click “Workers.” You will see the Workers window, which is a list of workers.
2. To change an existing worker record, click on that worker, then click the Detail button. You will see the Worker window with that worker’s information.
3. To add a new worker record, click the Add button. You will see the Worker window, ready for entry of a new worker.
4. To delete a worker record, click the Delete button, then on the warning message click the OK button to confirm deletion.
5. Within the Worker window, type the Login Name. This might be a first name, last name, or some combination, such as first initial and last name.
6. Within the Worker window, type in other information and set security settings.
7. Within the Worker window, click the Assignments button to open the Assignments window.
8. Add, change and delete Assignments for that worker, as needed. Each Assignment is defined for a Unit and Program, and consists of the security scope for Person, for Personal Health Info, and for Program-Related info.
9. When finished, close all windows to return to the ClientTouch main window.

## Preparing ClientTouch for Live Use

When you or someone in your organization first installs ClientTouch, the installation program will install a small amount of sample data. Before you and others begin to use ClientTouch for use with live data, you should delete some parts of this data and modify other parts of it.

### *Steps*

10. Update the License with license information you received from Social Work Software. For more information, see “Update License” on page 38.
11. Login as “Supervisor.” The password will be blank if it has not already been set by someone at your organization.
12. Change the password for the Supervisor. For more information, see “Change Your Password” on page 11. It would be a good idea to write down the password for Supervisor and store it in a safe, secure place, such as a locked filing cabinet.
13. Delete the person records of the sample data that comes with ClientTouch. For more information, see “Delete an Entire Person Record” on page 26. You will need to open and delete each person record in the sample data.
14. Delete the organization records in the sample data. For more on accessing Organizations, see “Tutorial 7: Adding Organizations” on page 26. For each organization, you will open its record, then click the Delete button.
15. Perform the following administrative tasks. For more information, see the appropriate sections at the indicated page numbers:
  - Maintain Selection Lists, page 34.
  - Maintain Income/Expense Categories, page 34.
  - Maintain Units, Programs and Resources, page 35.
  - Maintain Standard Output Sets, page 36.
  - Adjust Control Settings, page 37.
16. Delete all Worker records except the record for Supervisor. For information on accessing Worker records, see “Tutorial 10: Setting Up ClientTouch Security” on page 39.
17. Set up new Worker records with appropriate security rights. For more information, see “Tutorial 10: Setting Up ClientTouch Security” on page 39.
18. If you are converting from ClientTouch version 2.x to ClientTouch version 3.x, contact Social Work Software for data conversion tools and advice.