

Adding Families and Individuals



Welcome to the “Adding Families & Individuals” Guide,

The “*Adding Families & Individuals*” Guide was designed as a supplement to help end users better understand the software during the training process. We encourage users to refer to these guides during training and as a refresher once the trainers have left.

The ORS Quick Start Guides use a step-by-step process to walk users through various functions in the ORS Software. This particular guide will show users how to perform the following functions.

Adding Families

Adding Individuals

Assigning Individuals to Programs

Assigning a Family to a Program

Assigning Individuals to Special Codes

Adding Income to a Family

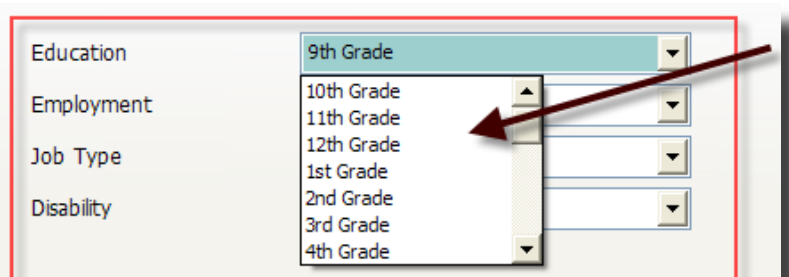
Adding Expenses to a Family

As you work through the Guide please make sure that you follow each step and DO NOT skip ahead. The sections in this guide build on one another to help simplify the entry process for users.

Also, you will notice Grey Boxes that contain Important Notes, Examples, and Reminders. Please make sure that you pay special attention to these areas.



To reduce the chance of human error while entering data, ORS is designed to allow users to select data from drop down boxes. The data inside of the drop down boxes are set up by your System Administrator. If at any time a drop down box does not contain the information that you need, please contact your system administrator, so they can add the data to the system.



Adding a Family

Step 1: Check the system for the Family and/or Individuals

Before you begin adding Families and Individuals, you need to ensure that they have NOT already been entered in the ORS Software.

Step 2: How to Search the System for Individual and/or Families

You can search for Families and Individuals in several ways in the ORS Software.

1- When you open the Client Tracking Module, you will see three tabs at the top of the screen. (Family, Individuals, and List of all Families) If you select the list page you will see all Families that have been entered into the system in the Large Grid as well as each Individual that is a member of the Highlighted Family in the Smaller Grid.

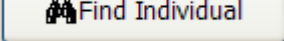
You may double click the header label to arrange the column in Alphabetical Order. You may also place your cursor in the field and type all, or a portion of the Families last name. This is a quick and easy way to find Families in the system.

The screenshot shows the 'family' application window with the 'List of all Families' tab selected. The main grid displays family information with columns for Family ID, Last Name, First Name, Phone, and Intake Date. The 'Last Name' header is highlighted, and an arrow points to it with the text 'Double click to alphabetize'. Below the main grid, an arrow points to the 'Last Name' field with the text 'Place your cursor in the "last name" field and type'. To the right, a smaller grid titled 'Individuals' shows members of the selected family, with columns for Individuals, In Family, and SS Number. An arrow points to this grid with the text 'Individuals that are members of the family'. Below the 'Individuals' grid is a 'Family Program Assignment' section with a table showing Family Size (4) and Family Totals (Monthly, Annual, %).

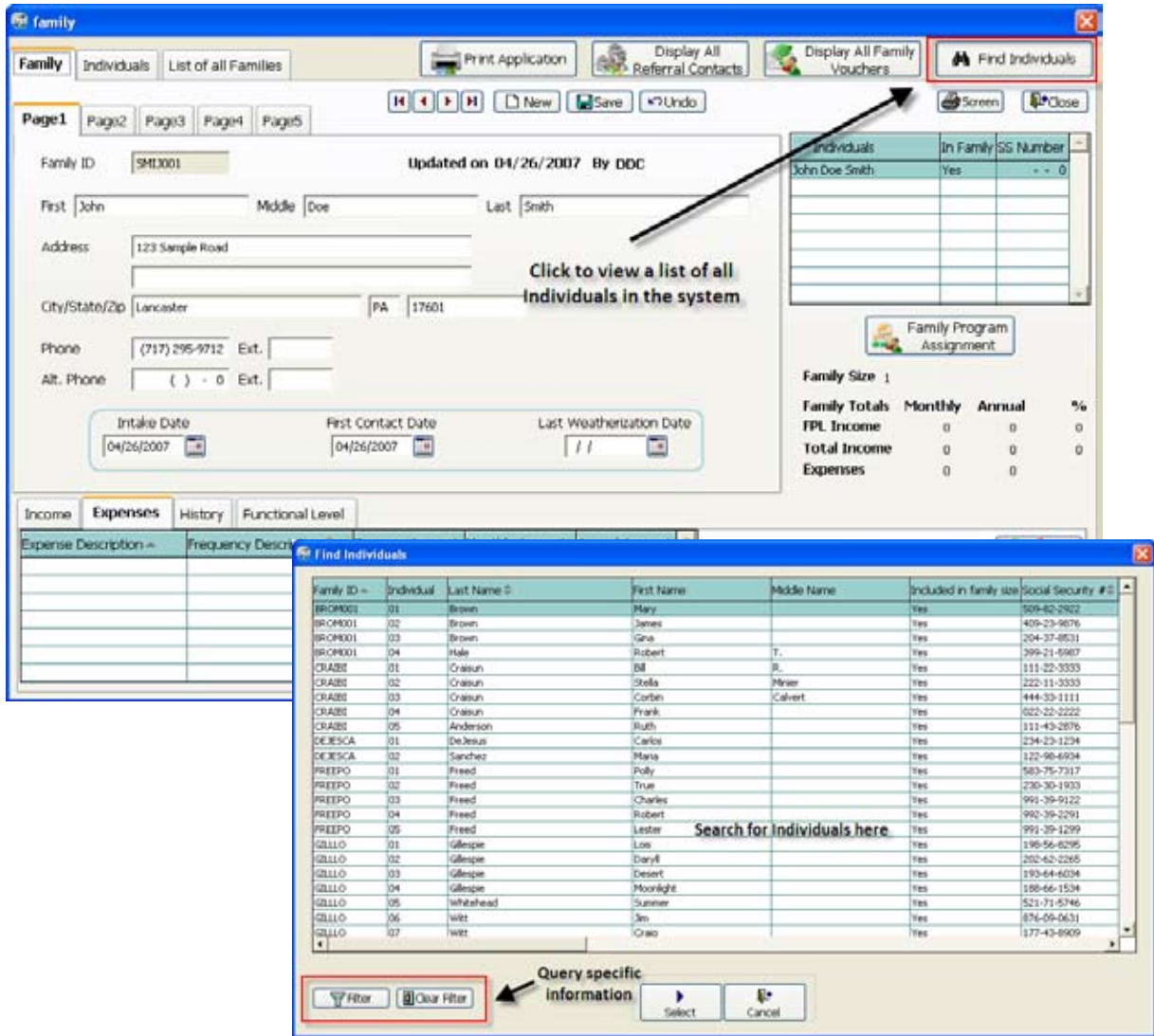
Family ID	Last Name	First Name	Phone	Intake Date
BROM001	Brown	Mary	(717) 294-9999	09/23/1998
CRAIBE	Craissun	Bill	(717) 393-1111	06/13/2001
DEJESCA	DeJesus	Carlos	(717) 297-5498	11/22/2002
FREEPO	Freed	Poly	(717) 397-7041	09/30/1997
GILLO	Gillespie	Lois	() 293-0101	08/07/1997
HOWAEL	Howard	Ellen	() 397-9115	06/10/1999
JEFFAD	Jeffries	Ada	(843) 555-1212	10/17/2003
JONT001	Jones	Tammy	(717) 295-9712	01/11/2006
LEAF3U	Leafin	Judy	(717) 399-9969	10/31/1996
MACNAL	MacNeil	Allison	() 391-8916	12/15/1999
MEADTH	Meade	Thomas	(717) 297-1111	08/15/1999
MILLWI	Miller	William	() - 0	02/05/1998
NGUYDO	Nguyen	Donald	() 290-1537	07/09/1997
PERRLO	Perry	Lois	() 295-0524	09/22/1999
SELTMA	Seltzer	Marge	(717) 665-3911	09/09/1997
WHITJA	Whitney	James	() 392-5316	10/17/1997

Individuals	In Family	SS Number
Mary Brown	Yes	509-82-2922
James Brown	Yes	409-23-9876
Gina Brown	Yes	204-37-8531
Robert T. Hale	Yes	399-21-5987

Family Totals	Monthly	Annual	%
FPL Income	2688	32260	156
Total Income	2910	35020	169
Expenses	1649	19792	

2- You may also search for Individuals by clicking the  Button on the top right portion of the screen. This will open the Find Individuals Window which allows you to search the list.

Because you are adding a new Family in this example, the Family will NOT be in the system, so you may continue to step 3.



The screenshot shows the 'family' application window. The main form displays details for Family ID 'SMJ001', updated on 04/26/2007 by DDC. The family members listed are John Doe Smith. A 'Find Individuals' window is overlaid on the bottom right, showing a list of individuals in the system. The window includes a search filter and a 'Query specific information' button.

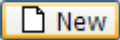
Family Details:

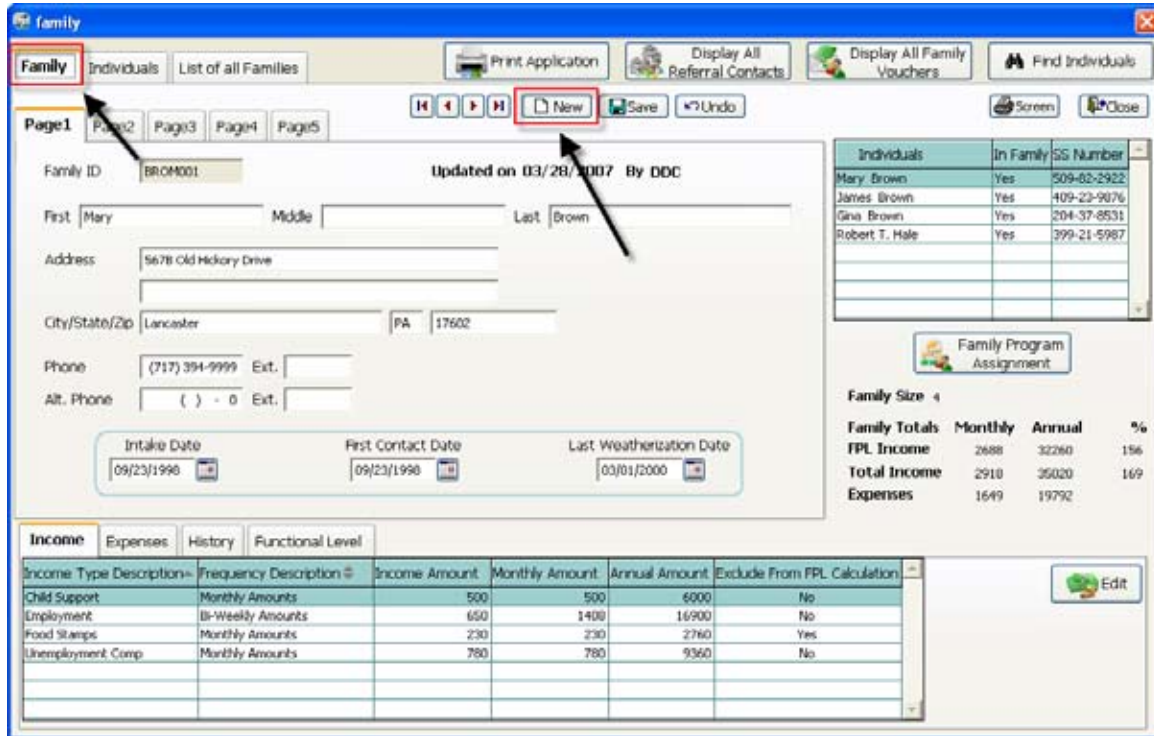
- Family ID: SMJ001
- Updated on: 04/26/2007 By DDC
- First Name: John, Middle Name: Doe, Last Name: Smith
- Address: 123 Sample Road
- City/State/Zip: Lancaster, PA 17601
- Phone: (717) 295-9712
- Intake Date: 04/26/2007, First Contact Date: 04/26/2007

Find Individuals Window:

Family ID	Individual	Last Name S	First Name	Middle Name	Included in family site	Social Security #
BROWN01	01	Brown	Mary		Yes	309-82-2922
BROWN01	02	Brown	James		Yes	409-23-9876
BROWN01	03	Brown	Jim		Yes	204-37-8531
BROWN01	04	Hale	Robert	T.	Yes	399-21-4987
CRASS	01	Crason	Bill		Yes	111-82-3333
CRASS	02	Crason	Stella	Mrs	Yes	222-11-3333
CRASS	03	Crason	Corbin	Calvert	Yes	444-33-1111
CRASS	04	Crason	Frank		Yes	622-22-2222
CRASS	05	Anderson	Ruth		Yes	111-43-2876
DEJESCA	01	DeJesus	Carlos		Yes	234-23-1234
DEJESCA	02	Sanchez	Maria		Yes	122-98-6904
PREEPO	01	Freed	Polly		Yes	583-75-7317
PREEPO	02	Freed	Trus		Yes	230-30-1903
PREEPO	03	Freed	Charles		Yes	991-39-9122
PREEPO	04	Freed	Robert		Yes	992-39-2291
PREEPO	05	Freed	Lester		Yes	991-39-1299
GILLO	01	Gilspie	Los		Yes	198-56-8295
GILLO	02	Gilspie	Daryl		Yes	202-62-2265
GILLO	03	Gilspie	Desert		Yes	193-64-6034
GILLO	04	Gilspie	Moonlight		Yes	188-66-1534
GILLO	05	Whitehead	Summer		Yes	521-71-5746
GILLO	06	wet	Jim		Yes	876-09-0631
GILLO	07	wet	Orao		Yes	177-43-8909

Step 3: Adding a New Family

Because the Individual/Family is NOT already in the system, you are going to start by adding a new family. Under the Client Tracking Module, select the Family Tab and click the  New button.



Step 4: Create a Family I.D.

The first field that you must enter is the “Family ID” field; you must add an unique family ID in this field as an identifier for this family. Most organizations have a specific format in which they use to create Family ID’s.



IMPORTANT - If your system is setup to automatically create a Family ID, then you **DO NOT** need to do this. The Family ID will be created once you save this record. Check with an administrator to confirm the rules your Agency has setup for the Family ID field.

The screenshot shows a web form with a navigation bar at the top containing 'Page1', 'Page2', 'Page3', 'Page4', and 'Page5'. To the right of the navigation bar are buttons for 'New', 'Save', and 'Undo'. The main form area contains the following fields:

- Family ID:** A text input field containing 'BROM001'. An arrow points to this field with the label 'Family ID Field'.
- Updated on:** A text field containing '03/28/2007'.
- By:** A text field containing 'DDC'.
- First:** A text input field containing 'Mary'.
- Middle:** An empty text input field.
- Last:** A text input field containing 'Brown'.

Step 5: Create a Name for the Family

You MUST now create a name for the Family. In ORS we create a name for the family by using a specific individuals name. This person is usually the Head of Household (HOH).

For Example, if you enter the name John Doe Smith, you have created the “John Smith Family”.



REMEMBER - The name you enter on this screen is nothing more than the Family Name. You are NOT adding any Individual information while you are under the Family Tab. You will enter specific information for John Smith under the Individuals Tab.

The screenshot shows the 'family' application window. The 'Family' tab is selected. The 'First' name field is highlighted with a red box and labeled 'Enter the Family Name'. The form includes fields for Family ID, First, Middle, and Last names, Address, City/State/Zip, Phone, and Alt. Phone. There are also date fields for Intake Date, First Contact Date, and Last Weatherization Date. A table on the right shows 'Family Totals' for Monthly and Annual FPL Income, Total Income, and Expenses. At the bottom, there is an 'Income' table with columns for Income Type, Description, Frequency, Amount, and Exclude From PPL Calculation.

Family Totals	Monthly	Annual	%
FPL Income	0	0	0
Total Income	0	0	0
Expenses	0	0	

Income Type	Description	Frequency	Description	Income Amount	Monthly Amount	Annual Amount	Exclude From PPL Calculation

Step 6: Enter Remaining Family Demographic Information on Pages 1,2,3,4 and 5

After you have entered the Family Name, continue entering the Family Information on page 1.

Once you have entered the information for Page 1, click the Page 2 Tab and enter the information on this page. Continue entering information on pages 3 through 5.



IMPORTANT - ORS does NOT require users to fill out ALL fields before moving on to the next section. If you do not have ALL client information you may still enter them into the system with the data that you have. You may then go back and complete the family and individual information later.

The screenshot shows the 'family' application window with the 'Page 1' tab selected. The form contains the following fields and sections:

- Family ID: []
- First: [John] Middle: [Doe] Last: [Smith]
- Address: []
- City/State/Zip: []
- Phone: () - 0 Ext. []
- Alt. Phone: () - 0 Ext. []
- Intake Date: [04/26/2007]
- First Contact Date: [04/26/2007]
- Last Weatherization Date: [/ /]
- Family Program Assignment: []
- Family Size: 0
- Family Totals:

	Monthly	Annual	%
FPL Income	0	0	0
Total Income	0	0	0
Expenses	0	0	
- Income Table:

Income Type Description	Frequency Description	Income Amount	Monthly Amount	Annual Amount	Exclude From FPL Calculation

Step 7: Save the Family

After you have entered the Family you click the Save Button. This Family is now saved in the system.


You may now begin entering individuals to this family.

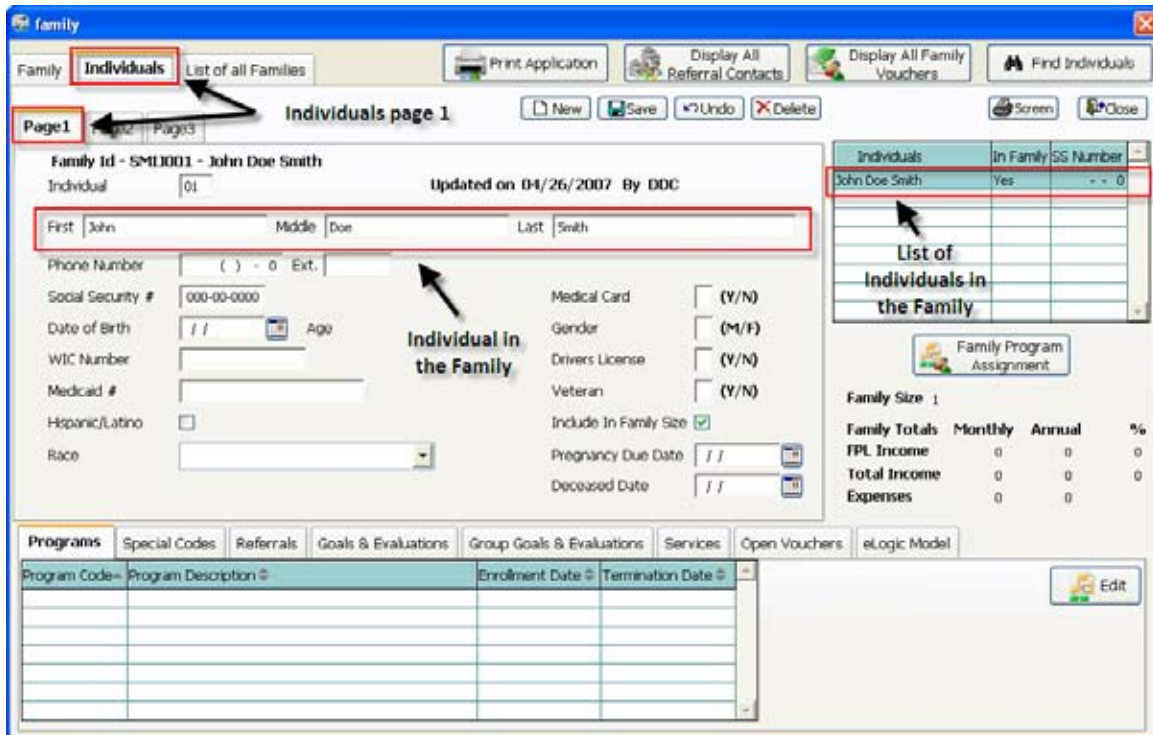
Adding an Individual

After you have setup the Family, it is time to enter the Individual(s) associated with this Family.

Step 1: Click the Individuals Tab

When you click the individuals tab, the system will open to Page 1, which will contain the name of the individual you entered on the Family page.

 **IMPORTANT** - You will notice that the individual's name that you entered for the family name, will automatically appear as the first individual in the family. For example if you created the John Smith Family, John Smith will be the first member of the family and you will enter specific demographic information for him.



Step 2: Enter Individual Demographic Information on Page 1

On Page 1 you will fill out the demographic information for this particular individual.

The screenshot shows a software window titled "family" with a menu bar and a toolbar. The main area is divided into several sections:

- Family Information:** Family id - 5M0001 - John Doe Smith. Updated on 04/26/2007 By DDC.
- Individual Information:** Individual 01. Fields for First (John), Middle (Doe), Last (Smith), Phone Number, Social Security # (000-00-0000), Date of Birth, WIC Number, Medicaid #, Hispanic/Latino, and Race.
- Medical and Identification:** Medical Card (Y/N), Gender (M/F), Drivers License (Y/N), Veteran (Y/N), Include In Family Size (checked), Pregnancy Due Date, and Deceased Date.
- Family Program Assignment:** A table with columns: Individuals, In Family, SS Number. Row: John Doe Smith, Yes, - - 0.
- Family Totals:** Family Size 1. Table with columns: Family Totals, Monthly, Annual, %. Rows: FPL Income, Total Income, Expenses.
- Programs:** A table with columns: Program Code, Program Description, Enrollment Date, Termination Date.
- Buttons:** Print Application, Display All Referral Contacts, Display All Family Vouchers, Find Individuals, New, Save, Undo, Delete, Screen, Close, Edit.

A red box highlights the main form area, and an arrow points to it from a text box at the bottom right that says "Enter demographic information for this individual".

Step 3: Enter Individual Demographic Information Page 2 and 3

On Page 2 and Page 3 you will enter more demographic information for this individual. Use the drop down boxes to populate the fields.

The screenshot displays a software window titled "family" with a tabbed interface. The "Individuals" tab is active, showing "Page 2" and "Page 3" as sub-tabs. The main form area is titled "Individuals Tab Page 2 & 3" and contains the following fields:

- Family Id - SMD0001 - John Doe Smith
- Individual Id - SMD0001 01 - John Doe Smith
- Primary Language (dropdown)
- Relation to HOH (dropdown)
- Marital Status (dropdown)
- Education (dropdown)
- Employment (dropdown)
- Job Type (dropdown)
- Disability (dropdown)
- Diagnosis (dropdown)
- Primary Diagnosis (dropdown)
- Secondary Diagnosis (dropdown)

On the right side, there is a table titled "Individuals" with columns "In Family" and "SS Number". The first row shows "John Doe Smith" with "Yes" in the "In Family" column and "0" in the "SS Number" column.

Below the table is a "Family Program Assignment" section with a "Family Size 1" label and a table for "Family Totals":

Family Totals	Monthly	Annual	%
FPL Income	0	0	0
Total Income	0	0	0
Expenses	0	0	

At the bottom, there is a "Programs" section with a table for "Program Code", "Program Description", "Enrollment Date", and "Termination Date".

A red box highlights the main form area, and an arrow points from the text "Enter demographic information for this individual" to the form fields.

Step 4: Save the Individual

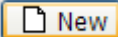
Once you have entered all the Demographic Information for the Individual, click the  Save Button to save the individual.

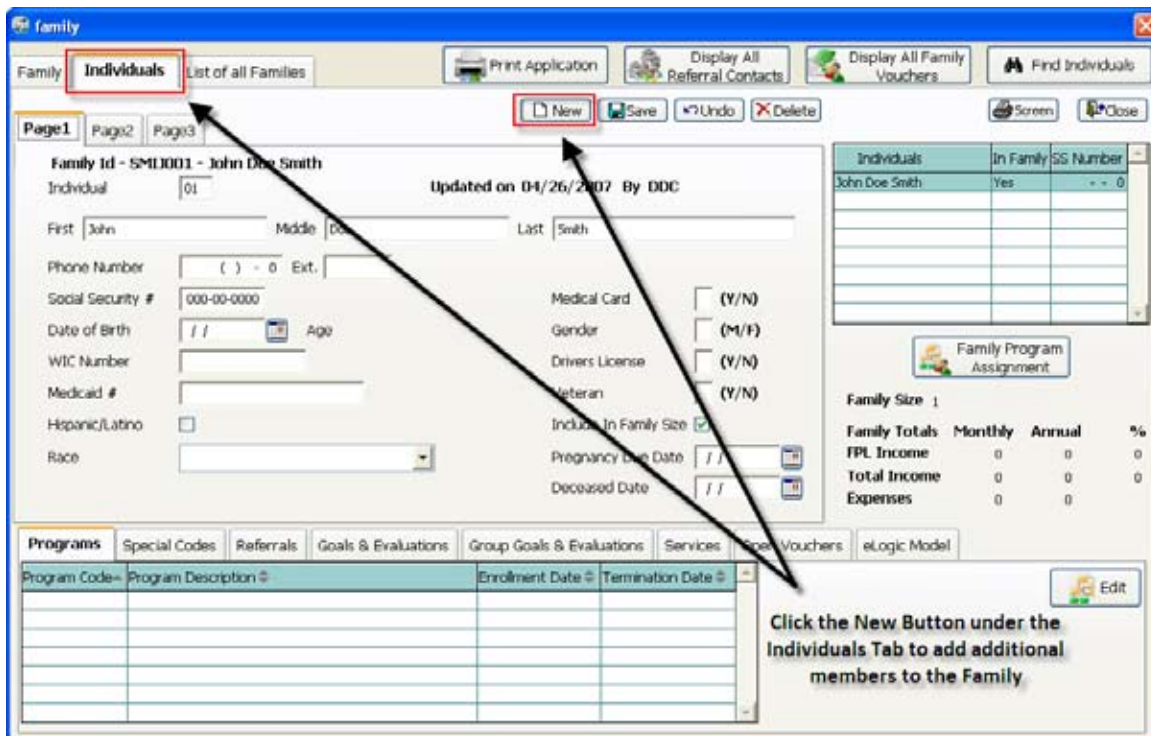
YOUR ARE NOT FINISHED ONCE YOU SAVE THE INDIVIDUAL!!



After you have entered an individual into the system you assign them to a program. See “Assigning Individuals to Programs” and “Assigning Individuals to Special Codes” to learn more.

Step 5: Enter Additional members to the Family

If there are other Family Members, click the  New Button and proceed from Step 2 of “Adding an Individual”. Enter all demographic information you have for each family member.



The screenshot shows the 'family' application window with the 'Individuals' tab selected. The 'New' button is highlighted with a red box and an arrow. The interface includes a form for entering individual information, a table for family members, and a 'Family Program Assignment' section. A text box at the bottom right provides instructions: 'Click the New Button under the Individuals Tab to add additional members to the Family'.

Assigning Individuals to Programs

Now that you have created a Family, and entered an Individual, you now may associate the Individual with a Program(s).



IMPORTANT - Not ALL Individuals will be assigned to Programs. Depending on how your organization is structured, some individuals may be assigned to multiple programs while others are not assigned at all. Please check with your System Administrator to better understand how clients will be assigned to programs.

Step 1: Click the Program Quick Tab

Click the Programs Tab at the bottom of the page and click the EDIT Button to open the program assignment screen.

The screenshot shows the 'family' software interface. At the top, there are navigation tabs for 'Family' and 'Individuals'. Below this, there are buttons for 'Print Application', 'Display All Referral Contacts', 'Display All Family Vouchers', and 'Find Individuals'. A toolbar contains 'New', 'Save', 'Undo', and 'Delete' buttons. The main area displays individual information for 'John Doe Smith', including fields for First, Middle, and Last names, phone number, social security number, date of birth, and various checkboxes for medical and driver's license status. A red box highlights the name fields, with an arrow pointing to them and the text 'We are working with John Doe Smith'. Below the individual information is a 'Programs' tab, which is highlighted with a red box. An arrow points to the 'Programs' tab with the text 'Click the Programs "Quick Tab"'. At the bottom right, there is an 'Edit' button, also highlighted with a red box, with an arrow pointing to it and the text 'Click the Edit Button'. On the right side of the interface, there is a table for 'Individuals' and a 'Family Program Assignment' section with a table for 'Family Totals'.

Individuals	In Family	SS Number
John Doe Smith	Yes	- - 0

Family Totals	Monthly	Annual	%
FPL Income	0	0	0
Total Income	0	0	0
Expenses	0	0	

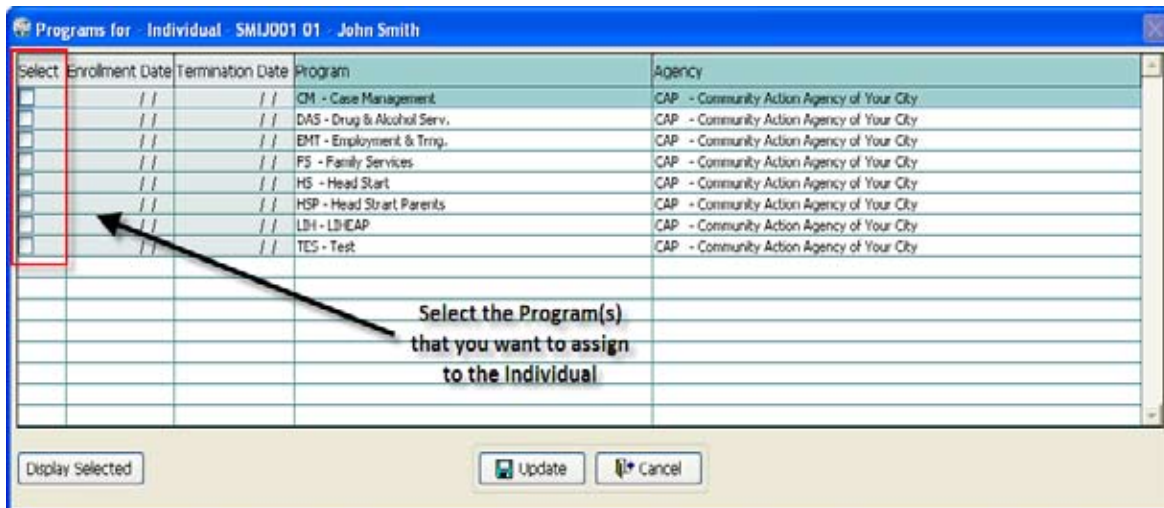
Step 2: Select the Program(s) you want to assign to the Individual

You may select more than one Program; however, you will ONLY be able to see the Programs that you have permission to work with.


You also have the ability to enter an “Enrollment and Termination Date” for each program. These dates are for tracking when an individual entered and left a program.



Example, Sally Johnson works in Case Management therefore she has been setup with the permission to ONLY add people to the Case Management Program. Sally would not be able to select LIHEAP, Head Start, or any other programs. These permissions are set up by your Agency’s System Administrator.



Step 3: Update and Save

Once you have selected the Program(s) that you want the individual to be assigned to, click the  Update Button.

Assigning a Family to a Program

In ORS you can select a Family and assign all members to a single program or to multiple programs. For example, if all members of a family are going to be assigned to the LIHEAP program and the Food Bank program, and you want to assign these two programs to all members of the family you can click the “Family Program Assignment” button and assign all members to the LIHEAP and Food Bank programs.



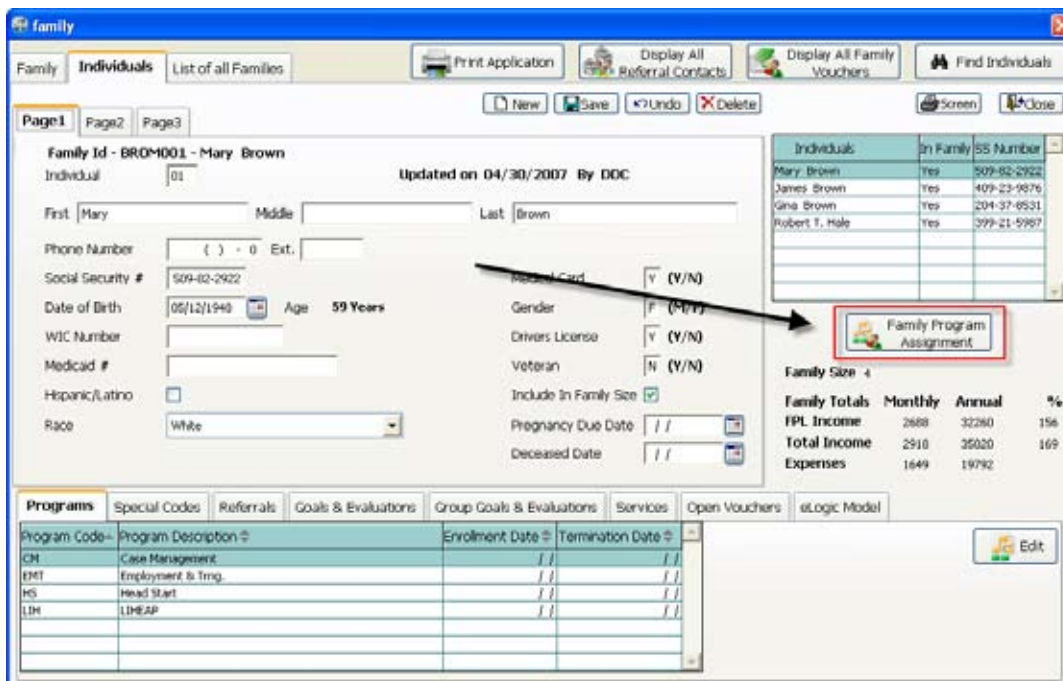
The “Family Program Assignment” button greatly reduces data entry because it eliminates the need to go to each family member and assign them to the program.

Step 1: Open the Family for which you want to assign a program

Click the Family Tab at the top of the page to open the family.

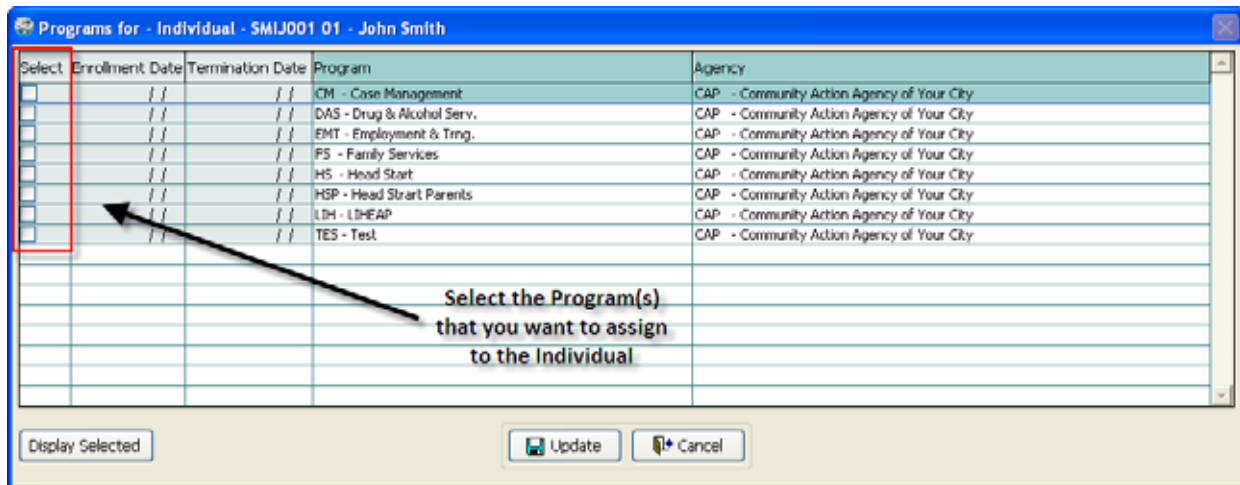
Step 2: Click the “Family Program Assignment” Button

Click the “Family Program Assignment” button to open a list of all of the possible programs that you can assign to this family.



Step 3: Select the Program(s) that you want to assign the Family Members to

Select the check box next to the program(s) you wish to assign to the family members and click the update button.



On this page you have the ability to enter an “Enrollment Date and Termination Date”. Use these fields to enter the date an individual has entered a program and the date when the individual left the program.



Remember that users will only be able to add family members to programs which they have been given access to. Example, Sally Johnson works in Case Management therefore she has been setup with the permission to ONLY add people to the Case Management Program. Sally would not be able to select LIHEAP, Head Start, or any other programs. These permissions are set up by your Agency’s System Administrator.

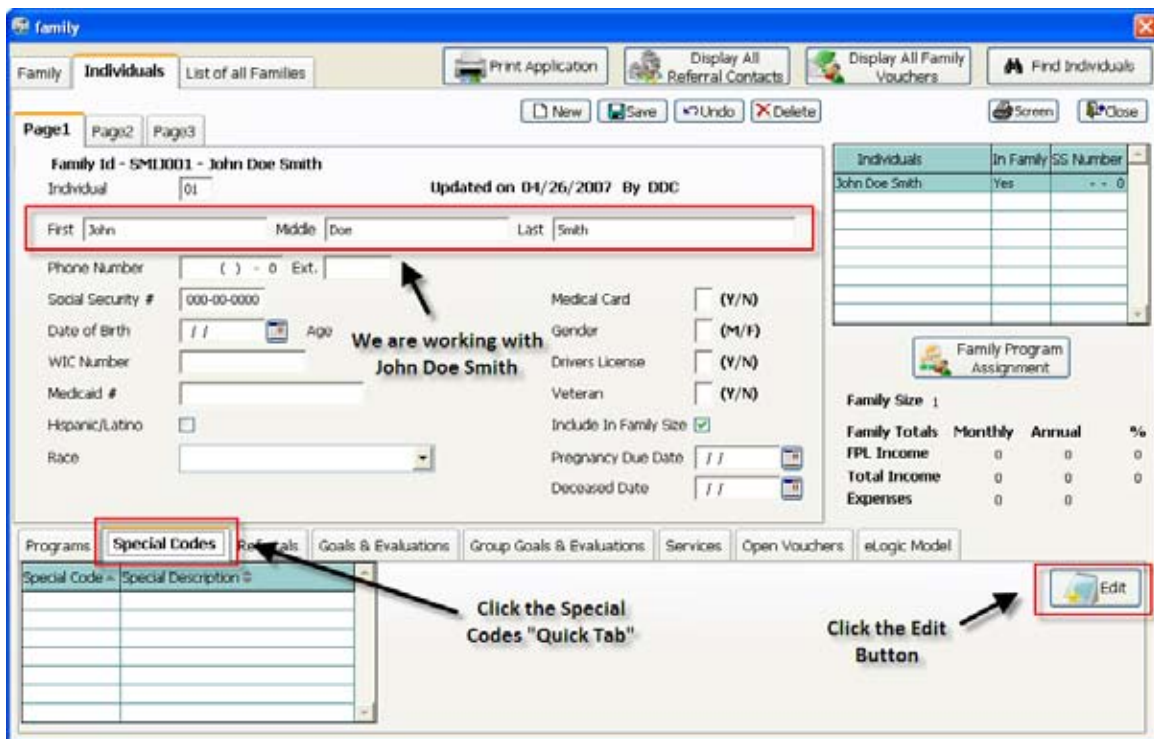
Assigning Individuals to Special Codes

Special Codes are an important part of the ORS Software. Special Codes allow users to associate Individuals to yes/no information. Special Code information has no date or program associated with it. For example, you might create a special code for “Clients who use Wheelchairs”. You would have your system Administrator create this special code in the system, which would allow workers to use this special code for individuals.

If you ever wanted to track how many Individuals you help that use a Wheelchair, you have this information in the system.

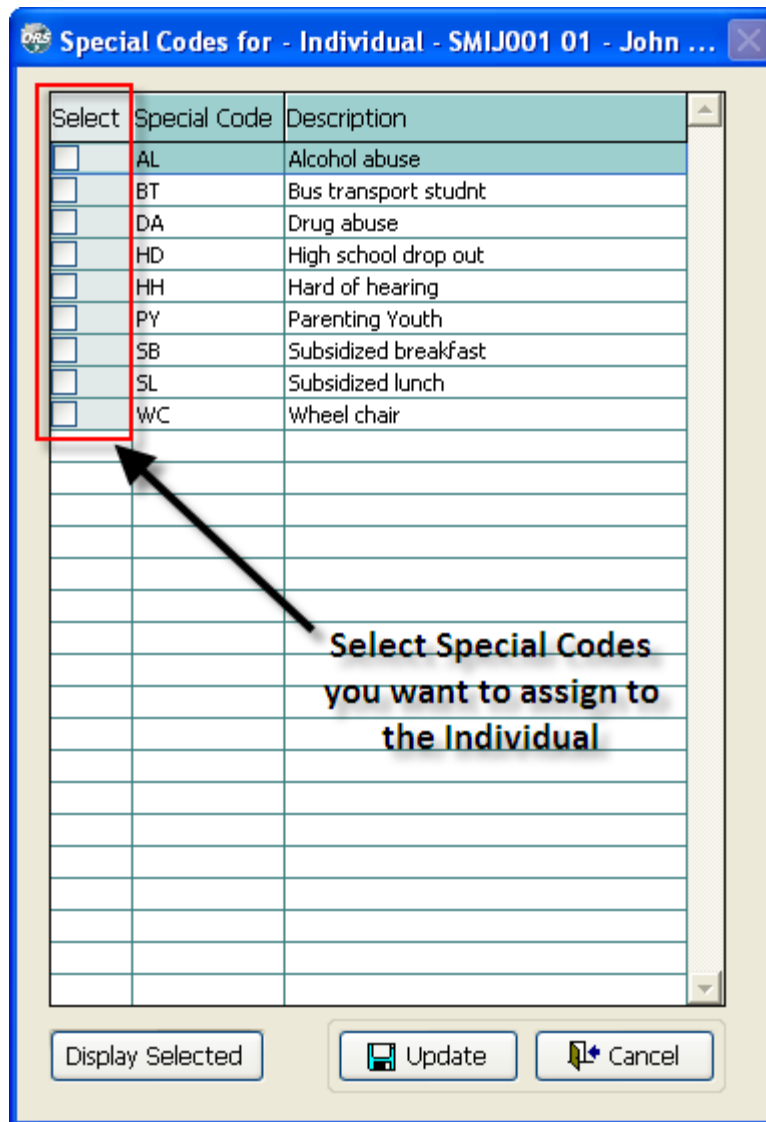
Step 1: Select the Special Codes “Quick Tab” at the bottom of the Individuals Page

Click the Special Codes Quick Tab at the bottom of the page and click the EDIT Button to open the Special Codes assignment screen.




Step 2: Select the Special Codes you want to assign to the Individual

Click the Special Codes that you want to associate with this Individual. You may select more than one Special Code.



Step 3: Update and Save

Once you have selected the Special Code(s) that you want to assign to the individual you click the  Update Button to save the information.

Adding Income to the Family

In the ORS Software you may add various income types and amounts for a specific Family. The following steps will demonstrate how to Add Income for a Family.



NOTE - In the ORS Software, users may associate income to specific individuals in the Family. For example, if Mary Brown has earned \$1,500 and Tom Brown earned \$1,000 the system will allow you to assign these earned income amounts to the individual. Because of this functionality, you should add all Family members before adding income.

Step 1: Select the Family Tab

Now that you have entered the Individuals in the Family you can begin adding income. Select the Family Tab.

Family ID: SMI001 Updated on 04/26/2007 By DDC

First: John Middle: Doe Last: Smith

Address: _____

City/State/Zip: _____

Phone: () - 0 Ext. _____

Alt. Phone: () - 0 Ext. _____

Intake Date: 04/26/2007 First Contact Date: 04/26/2007 Last Weatherization Date: / /

Individuals	In Family	SS Number
John Doe Smith	Yes	- - 0

Family Program Assignment

Family Size: 1

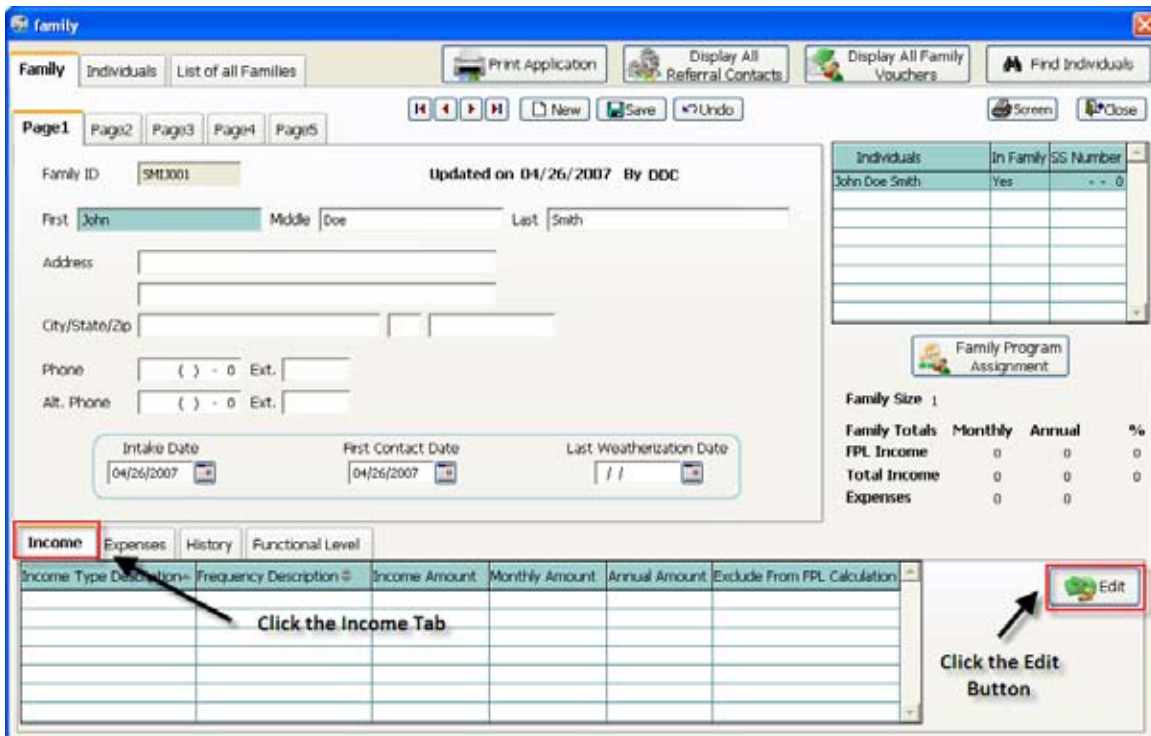
Family Totals	Monthly	Annual	%
FPL Income	0	0	0
Total Income	0	0	0
Expenses	0	0	

Income Type Description	Frequency Description	Income Amount	Monthly Amount	Annual Amount	Exclude From FPL Calculation

Edit

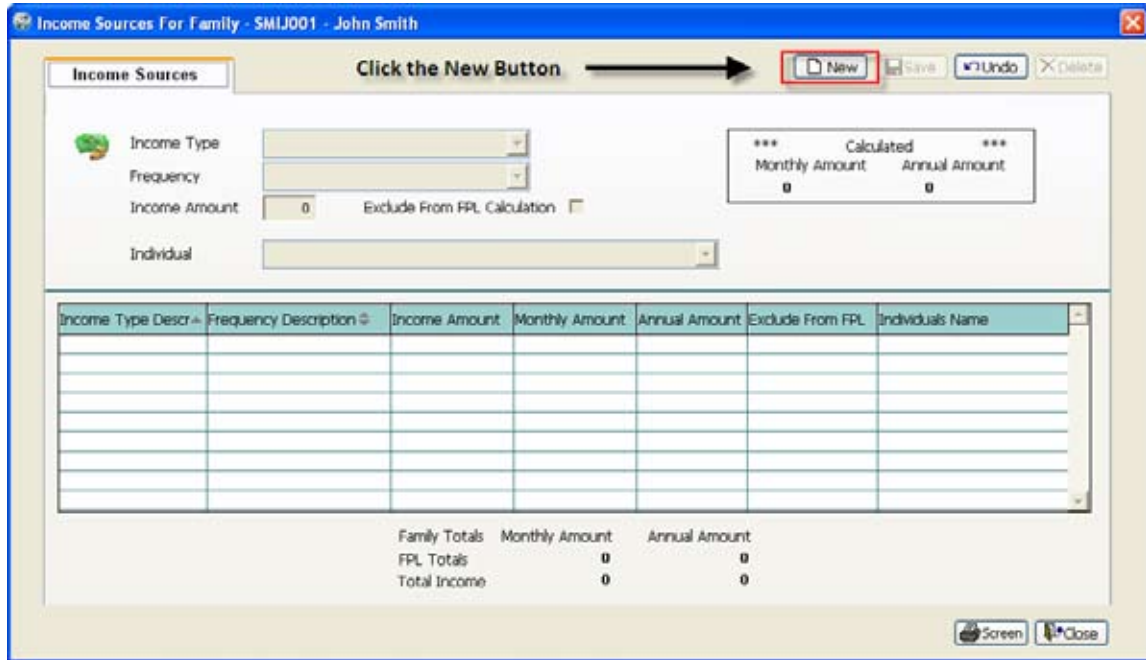
Step 2: Select the Income Tab at the bottom of the page.

Click the Income tab at the bottom of the page and click the EDIT button to open the income screen.



Step 3: Click the NEW Button

To add a new income for the family click the New button at the top of the page.



Step 4: Select the Income Type, Frequency, and Income Amount

Use the Income Type drop down box to see the various types of Income. Examples include, Child Support, Food Stamps, TANF, and General Assistance. Select the income type that is appropriate.

Use the Frequency drop down box to select the correct frequency for this Income Type. Examples include, Weekly, Biannually, Monthly, Daily, and more.

After you select the Frequency you enter the Income Amount. Enter the Total Income Amount in this field. Example, if John Smith receives \$100 Biannually from investments, you would select the Biannual frequency and enter \$100.

You also have the option to check the Exclude from FPL Calculations check box. This will keep this Income from being included in the calculation for FPL.

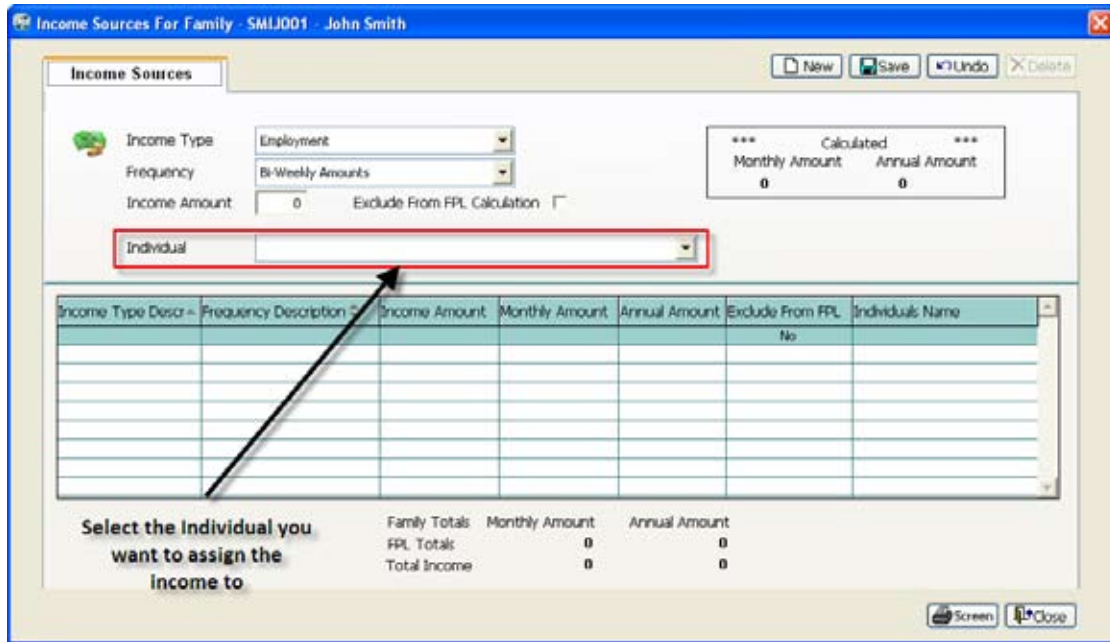
Income Type Desc	Frequency Description	Income Amount	Monthly Amount	Annual Amount	Exclude From FPL	Individuals Name
					No	

Select Income Type, Frequency and Income Amount

Family Totals	Monthly Amount	Annual Amount
FPL Totals	0	0
Total Income	0	0


Step 5: Assign Individual to Income

Use the Individual drop down box to assign this income to a family member.



Step 6: Save Changes

Click the  button on the Income Screen once you have made your changes.

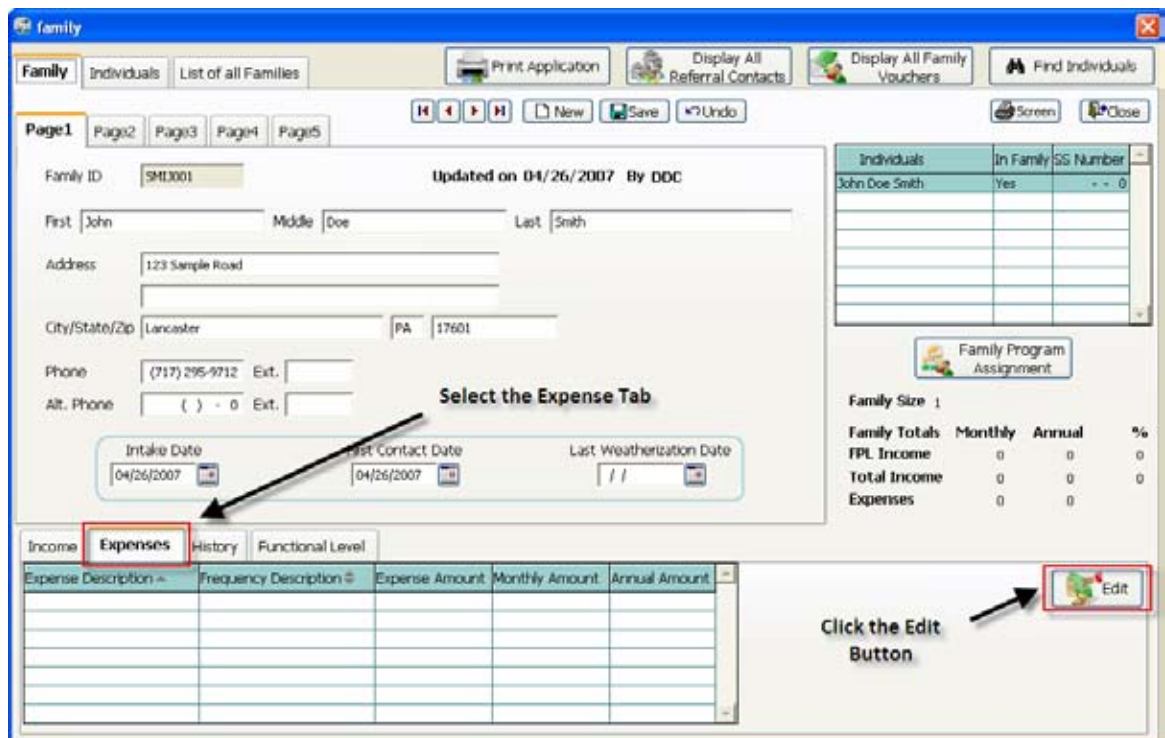
 **REMEMBER** - You have the ability to add multiple income types for a family. Once you create an income click the NEW button to add another. You will notice that as you add income(s) the grid is populated. Also, the FPL% and Income amounts change.

Adding Expense to the Family

In the ORS Software you may add various expenses for a Family. The following steps will show you how to Add Expenses for a Family.

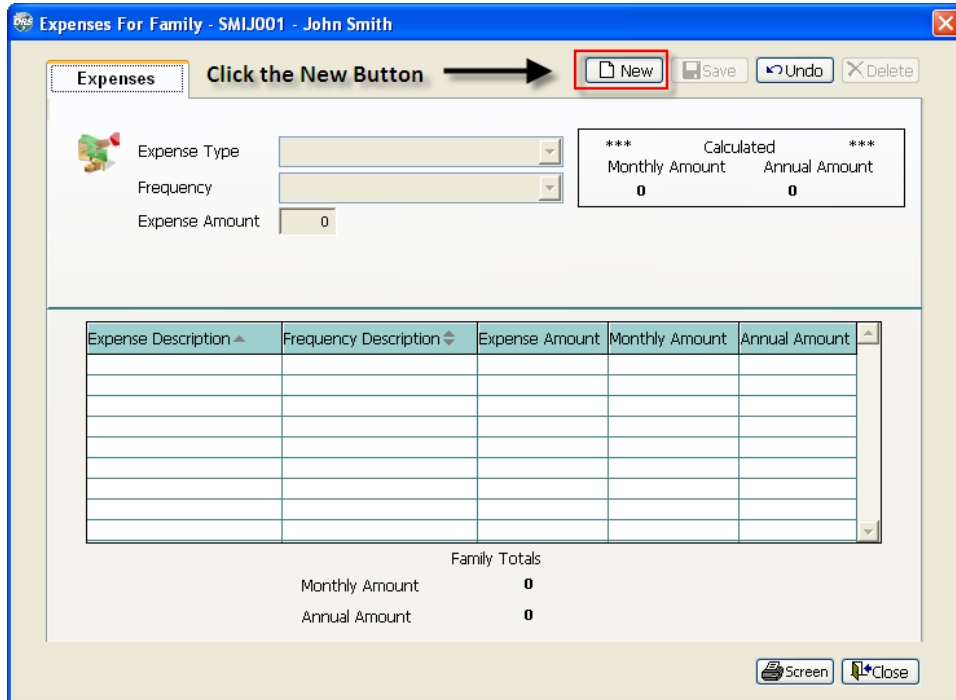
Step 1: Click the Expense Tab

Click the Expense tab at the bottom of the page and click the edit button to open the expense assignment screen.



Step 3: Click the NEW Button

To add a new expense for the family click the New button at the top of the page.



Step 4: Select the Expense Type, Frequency, and Expense Amount

Use the Expense Type drop down box to see the various types of Expenses. Examples include, Cable TV, Child Care, Electric, and Food. Select the expense type that is appropriate.

Use the Frequency drop down box to select how often the family pays this expense Type. Examples include, Weekly, Biannually, Monthly, Daily, and more.

After you select the Frequency you enter the Expense Amount. Enter the Total Expense Amount in this field. Example, if John Smith spends \$200 Biannually for cable Television, you would select the Biannual frequency and enter \$200.

The screenshot shows a software window titled "Expenses For Family - SMIJ001 - John Smith". At the top right are buttons for "New", "Save", "Undo", and "Delete". The main area contains a form with three fields: "Expense Type" (a dropdown menu), "Frequency" (a dropdown menu), and "Expense Amount" (a text box containing "0"). A red rectangular box surrounds these three fields, and a black arrow points from the bottom of this box towards the "Expense Type" dropdown. To the right of the form is a summary box with the text "*** Calculated ***" and two columns: "Monthly Amount" and "Annual Amount", both showing "0". Below the form is a table with five columns: "Expense Description", "Frequency Description", "Expense Amount", "Monthly Amount", and "Annual Amount". The table is currently empty. At the bottom left, there is a bold instruction: "Select Expense Type, Frequency and Expense Amount". At the bottom right are "Screen" and "Close" buttons. A "Family Totals" section at the bottom center shows "Monthly Amount" and "Annual Amount" both as "0".

Step 7: Save Changes

Click the  button on the Expense Screen once you have made your changes.



REMEMBER - You have the ability to add more than one expense for a family. Once you save an expense click the NEW button to add another. You will notice that as you add expenses, the grid is populated. The monthly and annual amount fields under the grid change as you add more expenses.