In-take Form Entry

1. Log-in into your W^5 account. If you have a volunteer, make sure you log-in for them before handing over the tablet.
2. Attach the USB cable from the scanner to the tablet. Tablet will automatically recognize the scanner.
3. Training video link go to. https://vimeo.com/464008663/d04ae2ebe0 (2 hours)
4. Choose a Site and click OK. If you do not know the site, clicking OK will bypass this. To change the site, logout and log back in.
5. **Best practice** to always **first search** the client using the search icon on top left. Various ways to search - first name, last name, birth date, email. Due to the common first/last name, birth date may be the fastest way to search a client.
6. Add a new case **+**.
7. To have strong database and reliable reports here are a few tips:
    a. Pay attention to **typos, lower cases and capitals**. Examples of typos to avoid:
        i. john or jJohn
        ii. John Smith, JR or John Smith, jr.
        iii. santsrosa, Santa Rosa, Santa Rosa,ca, Santarosa
        iv. Sebatopol, Sebstopol, Sebastopl
        v. Kelsevile, Kekseville
        vi. Forestvle
    b. If a client is unsheltered, we would like to still gather some limited information. Please enter “Homeless” in the address, enter the city and zip code.
    c. If there is no phone number, enter “707-523-7903” or “000-000-0000”
    d. If there is no birthdate, enter “01/01/1901”
8. If you entered incorrect information, use “Edit Case” to edit the information.
9. If there are suspected duplicate clients, flag the client and let Sarina or Allison know.
10. For Senior Basket (CSFP) Application, training video link go to https://vimeo.com/464008663/d04ae2ebe0 (starts at minute 57.55 of the video).