RECOVERY HOUSE SOFTWARE MANUAL

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https://RecoveryHouseSoftware.com
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INTRODUCTION

In 2017, RPM Ministries Inc received as a gift an 8200 square foot house on 36 acres in Jasper, GA. Ronnie and Penny Haynes, Pastors of Ministry House and Celebrate Recovery, began their journey as owners and staff of a men's Residential Recovery House. Penny had a background of 25+ years programming software and administrating businesses, so she immediately began designing a software to run their THOR approved, and eventually State Licensed 12 month program for men 18+. Penny eventually became a Licensed Pastoral Counselor, and then a Certified Alcohol and Drug Counselor, Medication Assisted Treatment Specialist, and Certified Clinical Trauma Professional.

Penny was asked in 2021 to also become Executive Director of Ruth House Ministries for women in Ranger, GA. The first thing she did was bring over the software she had been developing along the way to set everything in order. She saw that all recovery programs were not alike, and that this organization required some additional features to be added to the software.

In 2023, after almost seven (7) years in development, the software was released as Recovery House Software, an affordable cloud-based, HIPAA compliant software that helps Recovery Programs manage their clients, staff, finances, treatment plans, documentation, audits, donation management and more.

Penny shared it with the Georgia Department of Community Supervision, and they said they wished that everyone utilized this software to capture all necessary information and prepare for annual audits.

So today, RPM Ministries Inc brings you their software, and thanks you for being a customer and supporting their recovery house (100% of the proceeds of this software fund the recovery program, scholarships and jobs for people in recovery).

QUICK SETUP GUIDE

Administrator

Changing the Admin Login Information

1) Log in with the Company Code ID, temporary Username, Password and PIN emailed to you.
2) Reset your Password and PIN.
3) Log in again with the new Password and PIN.

Changing the Admin Contact Information

4) From the top menu Search Bar, search for and select Admin.
5) Edit your Name and Contact Information and press Submit.

Changing the Admin Username (if desired)

6) Click on Other -> Login to change your Username if desired.

Completing the Admin Dashboard fields

7) Click on the top menu Main -> Admin.
8) This is the Administration Dashboard. Click on each menu option and complete each form as needed, specifically the User Roles.
9) Click Back to return to the main Dashboard.

Adding Units and Rooms

10) Click on the top menu To Do -> Units & Rooms. Complete the forms.

Adding Staff

11) Click on the top menu Contacts -> Add Contact.
12) If required, add Staff contacts. Make sure to:
    a) Select a Contact Type **(DO NOT ALTER "Staff", "Client" or "Client Prospect", as these are used for filtering and reporting)**.
    b) Complete a minimum of First and Last Name.
    c) Assign a Role at the bottom of the page for privileges access.
    d) Press Submit.

e) Click Assign Location in the middle of the form. Return to Contact page.

f) Click Other -> Login and create their Username, Password and Pin, and check the Reset box if you want them to choose their own Password and Pin upon log in. It defaults to

  i) Username: [Contact First and Middle Initial (if any) plus Last Name]

  ii) Password: Test1234!

  iii) PIN: 000000

  iv) Reset Checked

g) Press Submit

h) Use button to Email temporary login information if they have an email address.

i) Click on the Contact's name at the top of the page to return to their Profile page.

j) Click Uploads, check Profile Photo box, and upload Staff photo.

k) Provide the Staff member with their Username, temporary Password and PIN.

Adding Clients

13) Add Client Contacts.

a) Select a Contact Type.

b) Complete a minimum of First and Last Name. Submit.

c) Click Assign Location in the middle of the form. Return to Contact page.

d) Click Add Client Info and complete that form (Date of Birth, Intake Date, Graduation Date, Demographics, etc.)

e) Click Other -> Login and create their Username, Password and Pin, and check the Reset box if you want them to choose their own Password and Pin upon log in. It defaults to:

  i) Username: [Contact First and Middle Initial (if any) plus Last Name]

  ii) Password: Test1234!

  iii) PIN: 000000

  iv) Reset Checked

f) Click on the Contact's name at the top of the page to return to their Profile page.

g) Click Uploads, check Profile Photo box, and upload Client photo (if it turns sideways, there is a link to Rotate the photo).

h) Provide the Client with their Username, temporary Password and PIN.

Adding Opening Balance for Transactions (Operating Account)

14) If you are using the Transactions module,

a) click Accounts -> Add Transaction.

b) Enter an opening balance (the Ending Balance of your last bank statement) dated the last day of that bank statement, and enter a reconciliation date. This prepares you for your first Transaction Reconciliation.

Adding Opening Balance for Ledger (Client Account)

15) If you have a pre-existing Client Bank Account,

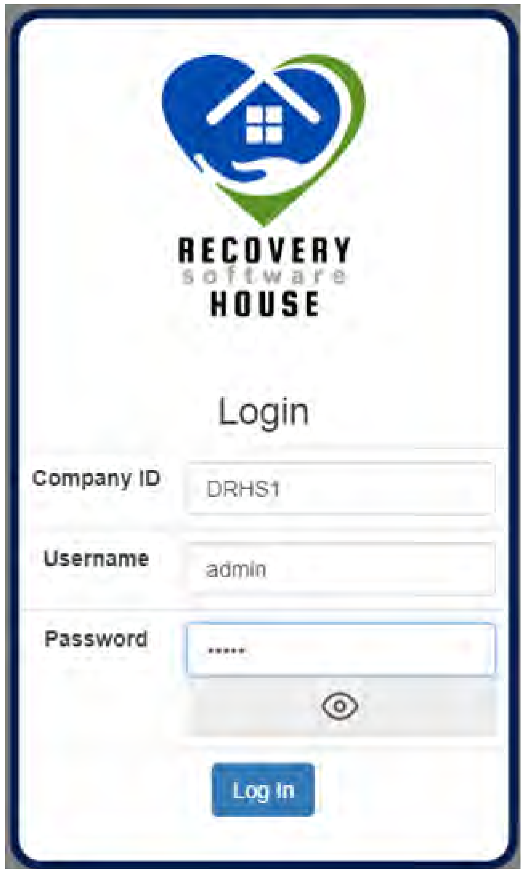
a) click Accounts -> Add Ledger Item.

b) Enter an opening balance (the Ending Balance of your last bank statement) dated the last day of that bank statement, and enter a reconciliation date. This prepares you for your first Ledger Reconciliation.

16) If you want to use our Payment Pages, you will need to set up a Paypal Business Account, and then get your Paypal Live and Sandbox Client ID and Secret Key. For step by step instructions, go to the Payment Information section of this manual.

LOGIN

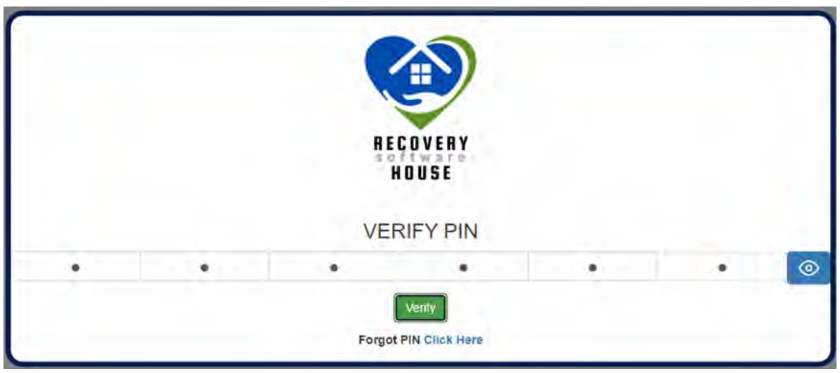
Go to https://rhs.recoveryhousesoftware.com



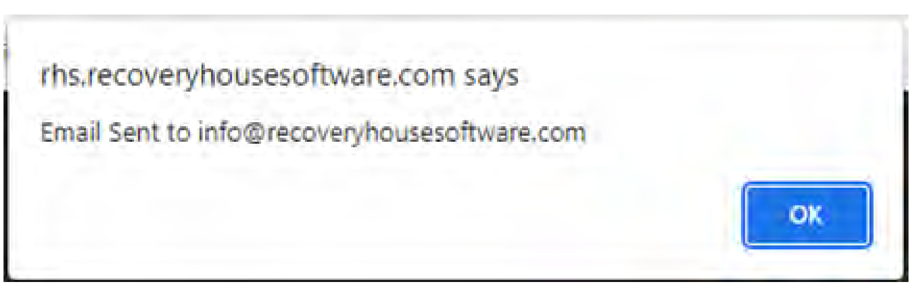
- **Company ID** – We will send the Organization's Program Administrator a unique Company ID via email, along with an Administrator temporary username, password and PIN which the Administrator can change.

  The Program Administrator will create and distribute usernames, passwords and pins for all other Users. The Program Administrator will decide if a user will be forced to create a new password and pin the first time a user logs in.

- **Username & Password** – You will receive a username and password from the Program Administrator. **You may be forced to change the temporary password the first time you log in.** Do not share your password with anyone else.
- **Forgetting your password –** your password is encrypted and cannot be seen by anyone else. However, you can request that your Organization's Program Administrator reset your password temporarily so that you can change the password.



- **PIN** – You will receive a PIN from the Program Administrator. **You may be forced to change the PIN the first time you log in.** Do not share your PIN with anyone else.
- **Forgetting your PIN**. Your PIN can be sent to you via email by clicking "Click Here".

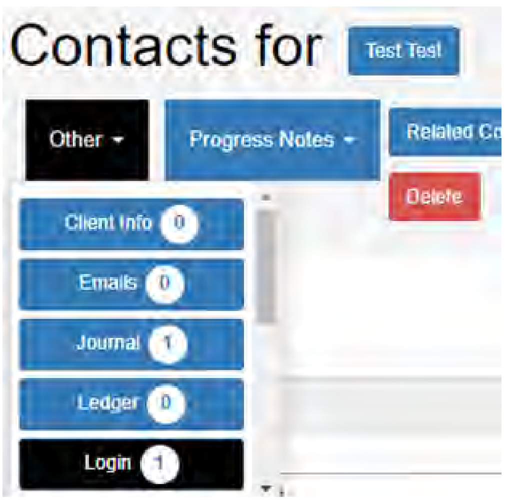


However, you can also request that your Organization's Program Administrator reset your PIN temporarily so that you can change the PIN.

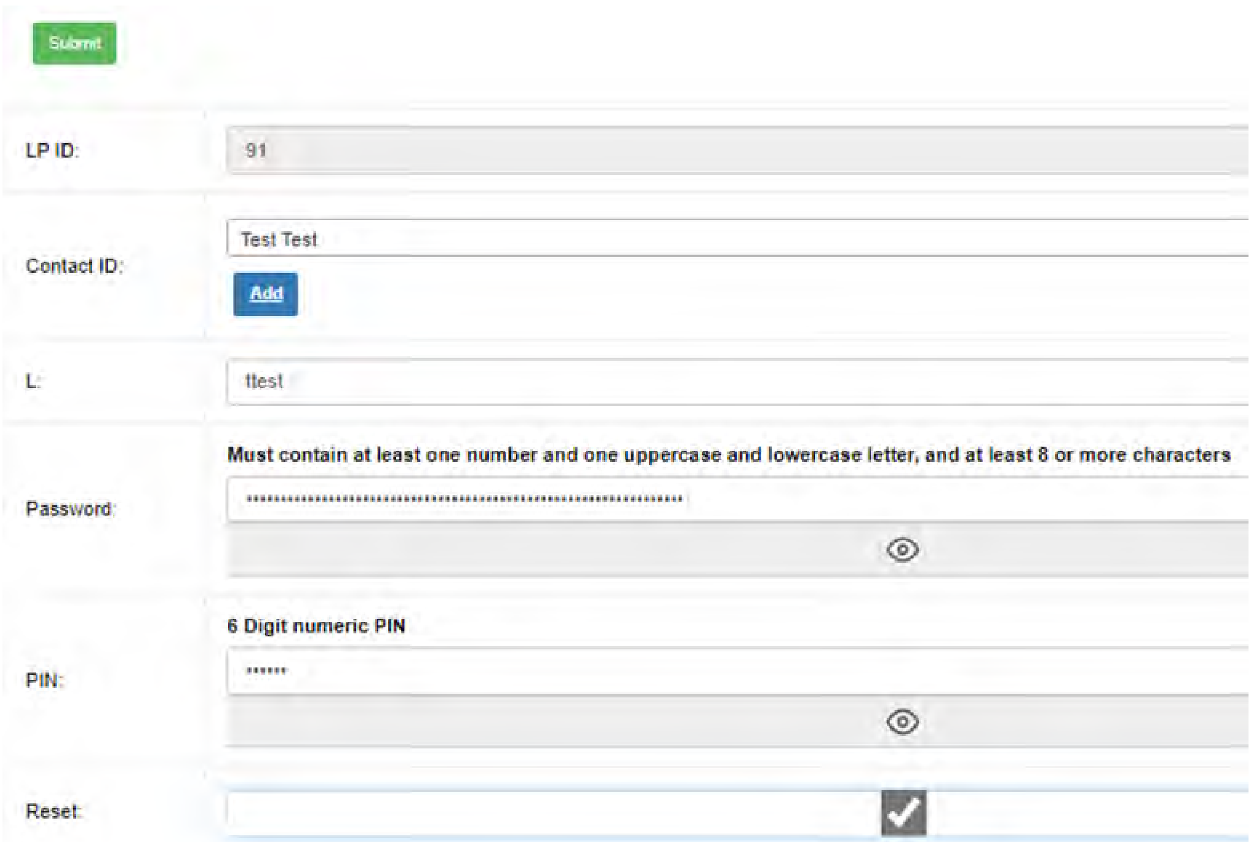
RESETTING YOUR PASSWORD AND PIN

Your Program Administrator must manually Reset your Password and PIN for you.

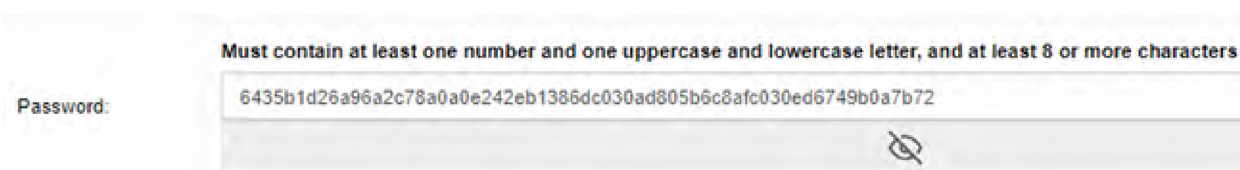
Administrator Instructions



- Go to the Contact page.
- Click on Other.
- Click on Login.

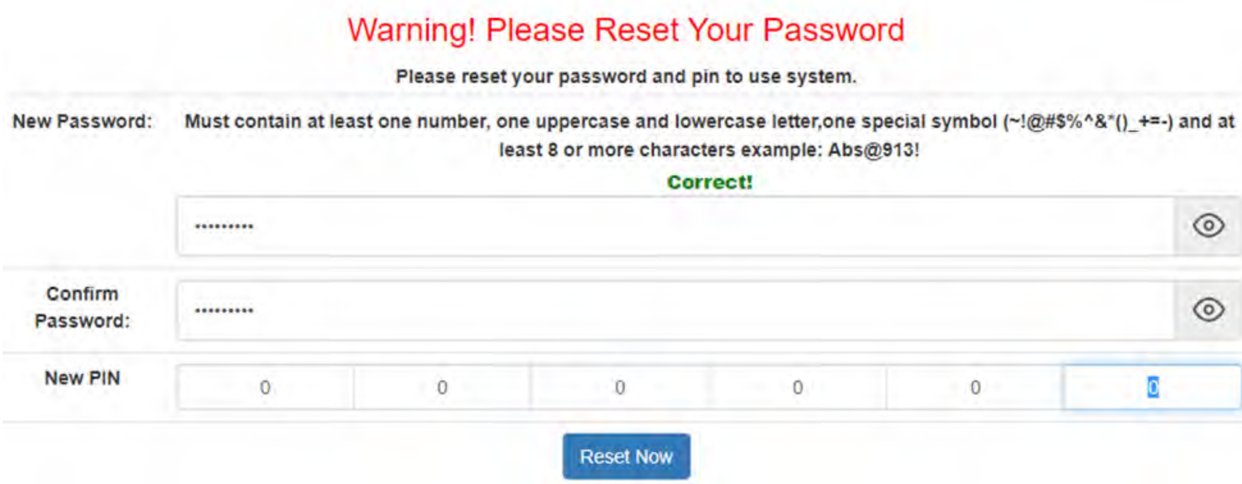


- Change the Password and PIN number and CHECK the Reset box.
- If you click on the , you will be able to see what you have typed into the box.
- Press Submit.
- Provide the temporary Password and PIN to the user.
- They will be forced to enter their own Password and PIN.

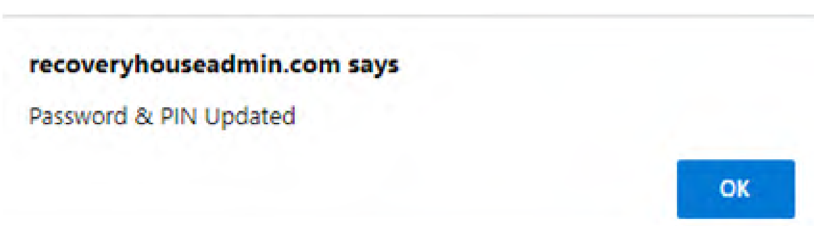


- Once you have pressed SUBMIT, you will no longer be able to see the password. It has been encrypted, and must be reset to change it.

- Log in using the temporary Password and PIN. You will immediately be asked to reset your Password and PIN.



- **Read the password creation instructions** – you must include at least
  1 number
  1 uppercase letter
  1 lowercase letter
  1 symbol
  8 characters
- You must type it once and then type it again.
- Click the  to see the password you are typing.
- Then enter your new pin.
- Press Reset.



- You will get a popup alert that your Password and Pin have been updated.

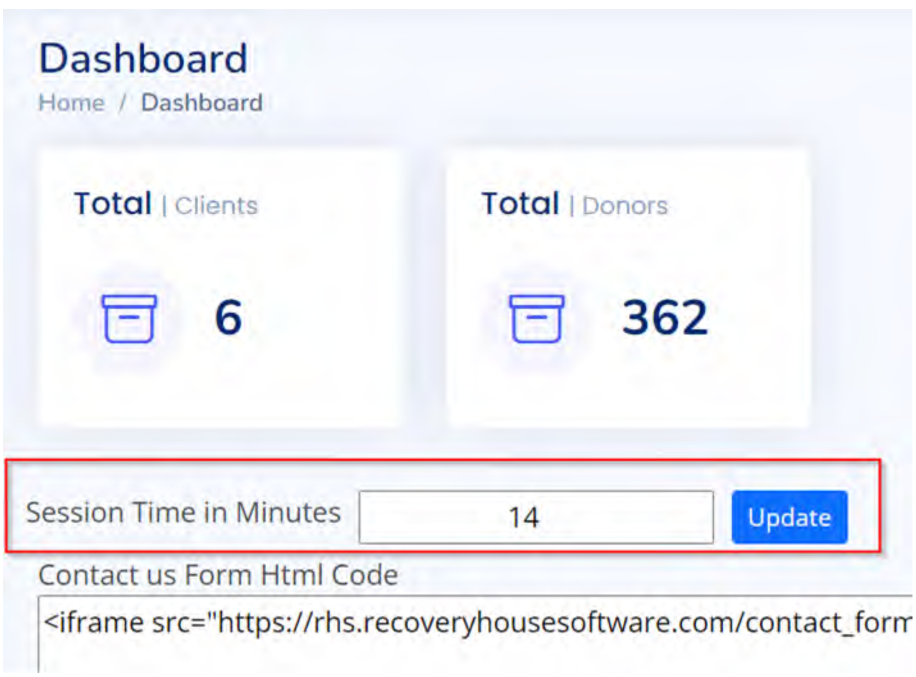
- You will return to the Login page where you will use your new Password and PIN.

SESSION TIME OUT

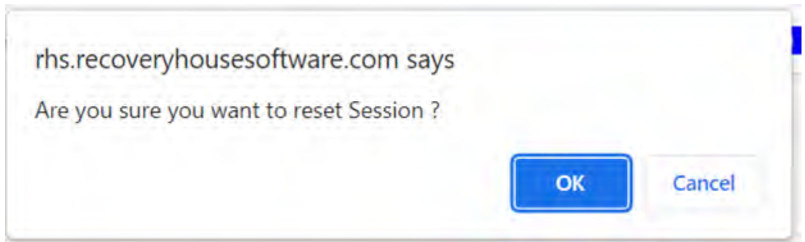
HIPAA Required Time Out of Sessions

Whenever you log into a web site, it keeps track of how long you stay logged into the program. HIPAA privacy requirements include limiting the amount of time your session can remain open if you are not active on a page. This helps limit the opportunity for unauthorized access to the protected information in your database should you step away from your desk and forget to lock your screen.

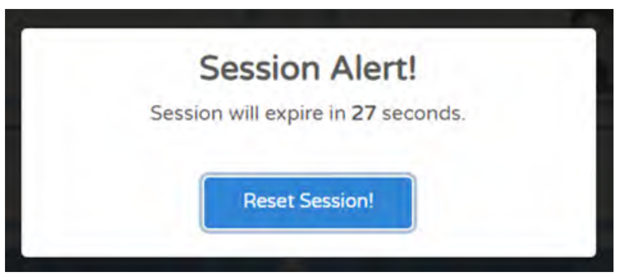
The Administrator can set the session time via the Admin Dashboard.



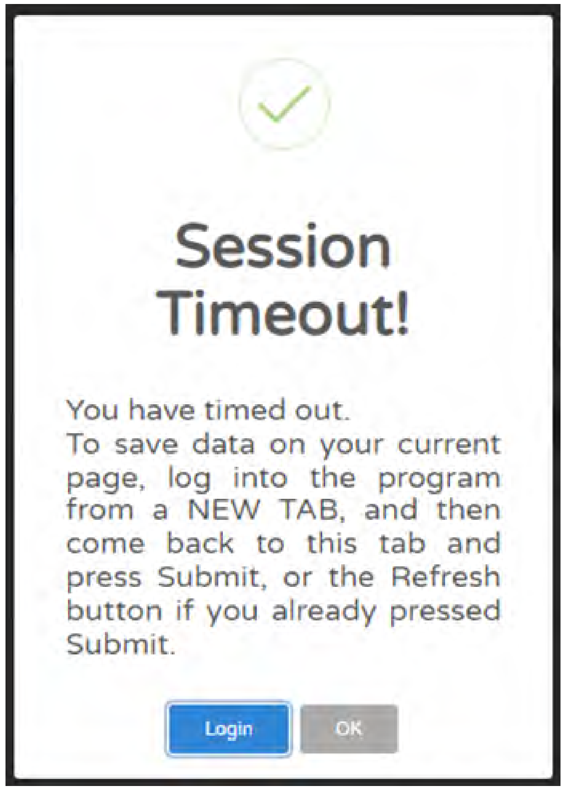
You can reset the session at any time using the circle at with 2 arrows above the menu, next to the Session Time countdown box. It will ask you to confirm if you want to reset the session.



After the session time expires, you see a popup screen that will give 30 seconds to reset the session.



If you miss that, you will get a popup box to log in again.



If you have unsaved data on any page at that time, simply click on the popup's LOGIN button, and the Login Page will open in a NEW tab. You can log in on that NEW tab to restart your active session. Then come back to your page with unsaved data and continue working.

There may be times when you are unaware that you have timed out, and you press Submit only for it to tell you that you have timed out.

DO NOT PANIC. Nothing is lost as long as you leave that page just as it is.

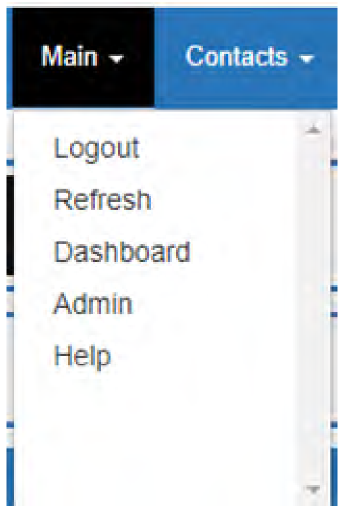
- Open the program in a **NEW tab** by clicking the Login link.
- Log in from the NEW tab.

- Return to your timed out page.
- Click the REFRESH link and it will finish submitting your data.

MENUS

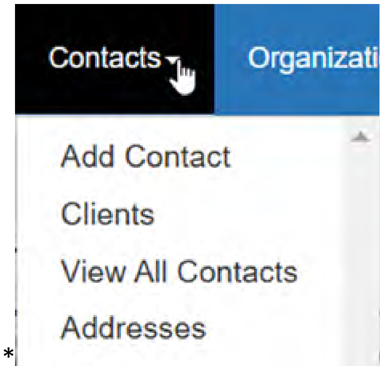
Your access to the various Menus and Pages is determined by your organization's Program Administrator. You may not have access to every option described in this manual when you log in.

Main



- **Logout** – Allows you to log out of your current account
- **Refresh** – Refreshes the screen of your current page
- **Dashboard** – Returns you to the Home page, also called the Dashboard
- **Admin** – An Administrator accessible Dashboard to configure your program, such as your company information to create the header on your reports, where to email reports, etc.
- **Help** – Takes you to our Helpdesk where you can watch videos or read articles about the program, or you can create a Help Ticket and our staff will answer your questions.

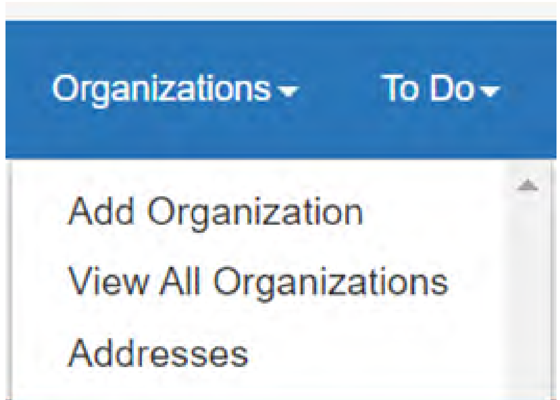
Contacts



***

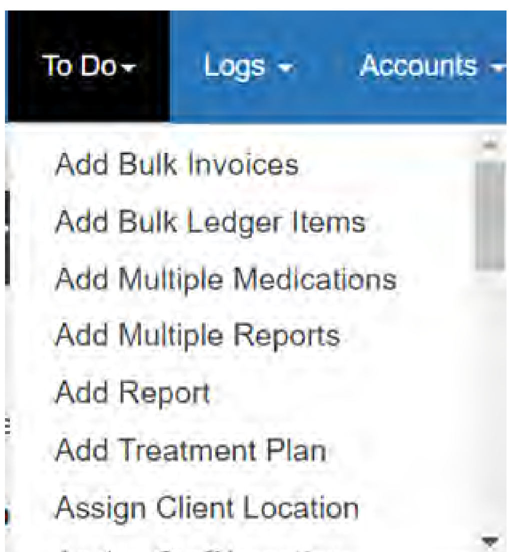
- **Add Contact** – Add a Contact to the database
- **Clients** – View all current clients
- **View All Contacts** – View, Search, Filter, Export, and Print the Contacts table
- **Addresses** – View all Contact and Organization Addresses
- **Bulk Connect Contacts to Organization –**
    - One tab will show you Organizations that contain the same names as the Contact. You can
        - Connect them,
        - Update the Organization contact type to match the Contact,
        - or Create a new Organization to connect.
    - The other tab will show Contacts without any matches and lets you Create new Organizations from existing Contacts
- **Bulk Create Contacts from Organizations**
    - One tab shows Organizations without Contacts. You can create new Contacts in Bulk from the name of the Organization, or create them one by one and add a First, Middle and Last Name

Organizations



- **Add Organization** – Add an Organization to the database
- **View All Organizations** – View, Search, Filter, Export, and Print the Organization table
- **Addresses** – View all Contact and Organization Addresses

To Do

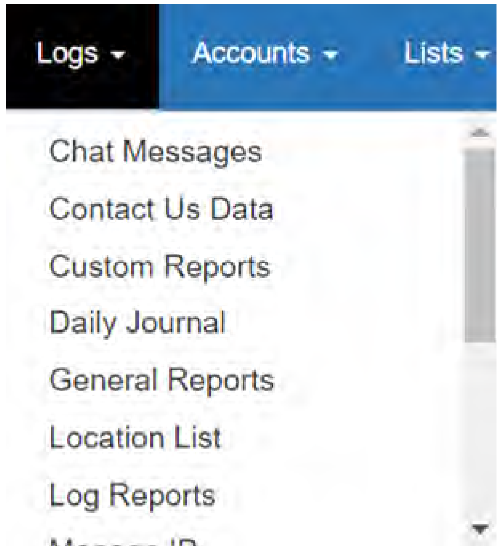


The list of options may change.

- **Add Bulk Invoices** – Create, review, save, upload and email invoices for any or all clients at one time from one page
- **Add Bulk Ledger Items** – Add Ledger charges for any or all clients from one page
- **Add Multiple Medications** – Log Medication Administration for multiple clients and medications at one time.
- **Add Multiple Reports** – Lets you create a single report for multiple people from one form, and also saves a PDF copy of the report in each person's uploads folder.
- **Add Report** – Add a new Report by selecting and completing a form of your choosing.
- **Add Treatment Plan** – Add or Edit Treatment Plans
- **Add Treatment Plan Note** – Add a Note to any client's Treatment Plan
- **Assign Client Location** – Assign a Unit, Room and Bed number for each Client.
- **Assign Staff Location** - Assign a Unit, Room and Bed number for each Staff.
- **Bulk Donation Report** – This module allows you to select a calendar year and create mass Donation letters, emails, labels and Contact lists from donations for that year, as well as archive the PDF versions to the Donor's Profile Page uploads.
- **Classes** – Enter Names and Descriptions of Classes and upload their curriculum.
- **Edit Chore Names** – Add or Edit Chore names and descriptions.
- **Forms** – Create custom reports with these forms by adding different types of labels, fields and templates.
- **Incomplete Projects** - View, Search, Filter, Export, Print and Edit Incomplete Projects.
- **Incomplete Tasks** - View, Search, Filter, Export, Print and Edit Incomplete Tasks.

- **Maintenance** – Keep track of Maintenance items. These can be seen on the Task Calendar in RED.
- **Messages** - View, Search, Filter, Export, Print and Edit Messages sent between Staff.
- **My Tasks** - View, Search, Filter, Export, Print and Edit Tasks assigned to you.
- **Projects** - View, Search, Filter, Export, Print and Edit Projects.
- **Recent Progress Notes** – View Client Progress Notes updated over the past 14 days.
- **Reports** – View, Search, Filter, Export, Print and Edit all Reports created using the Add Report button.
- **Tasks** - View, Search, Filter, Export, Print and Edit all Tasks.
- **Templates** – Create form letters, checklists to be included in Report Forms.
- **Units & Rooms** – Enter in the different Unit Names and Locations for your program, as well as their rooms and number of beds.
- **Verify Chores** – Verify completion of chores that clients have marked as Complete.
- **Verify Objective Completed** – Verify that a Treatment Plan Objective marked Complete by the client is Complete.

Logs

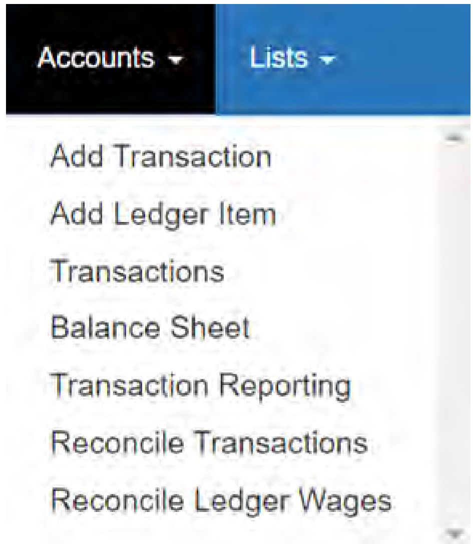


The list of options may change.

- **Chat Messages** - View, Search, Filter, Export, Print and Edit Chat Messages.
- **Contact Us Data** – Submissions from the Contact Us form that create Client Prospects.
- **Custom Reports** – Select a Custom Report to View, Search, Filter, Export, Print and Edit the results.
- **Daily Journal** – Show a list of Clients in alphabetical order with their journals in descending chronological order.
- **General Reports** – Print selected reports for selected clients.
- **Location List** – View, Search, Filter, Export, Print and Edit Client Locations.
- **Log Reports** – View data changes and page visits per User.
- **Manage IP** – Add and delete IP addresses for the Sign in and out module.
- **Medication** – Enter and view Medications, Medication Administration, and the Medication Administration Log.
- **Metrics** – Multiple reports about present and past clients
- **Records by Date** – Filter and view data entered in multiple tables by date range.
- **Refrigerator** – Enter and view temperatures for refrigerators and freezers.

- **Sign Out Data** – View, Search, Filter, Export, Print and Edit Sign in and out data.
- **Staff Treatment Plan Notes** – View, Search, Filter, Export, Print and Edit Staff Treatment Plan Notes

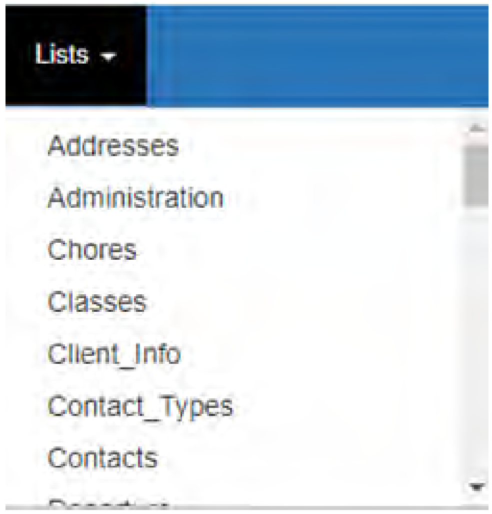
Accounts



The list of options may change.

- **Add Transaction** – Add a new financial Transaction.
- **Add Ledger Item** – Add a new Deposit, Withdrawal, Charge or Applied Payment to the Client Ledger.
- **Transactions** – View, Search, Filter, Export, Print and Edit Transactions.
- **Balance Sheet** – See Annual and Client Balance Sheets.
- **Transaction Reporting** – Search Transactions using various filtering and sorting criteria.
- **Reconcile Transactions** – Reconcile Transactions to an Operating Account Bank Statement.
- **Reconcile Ledger Wages** – Reconcile Ledger entries to a Client Bank Statement.

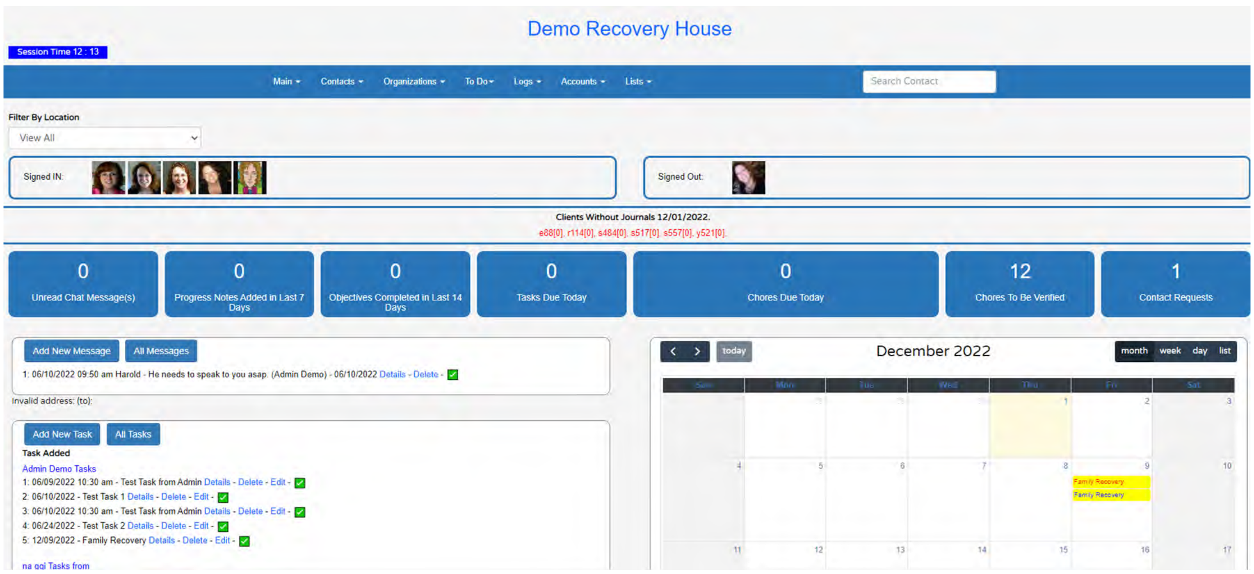
Lists



The list of options may change.

- **View database tables** – View, Search, Filter, Export, Print and Edit data from the underlying tables. ***We suggest Administrator access only.***

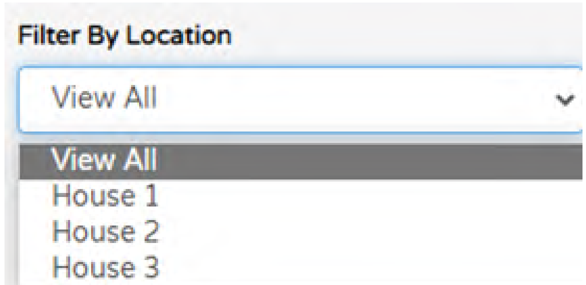
DASHBOARD



Session Time

This tells you how much time you have left on your session before you have to log in again and allows you to manually reset the session at will.

Filter By Location



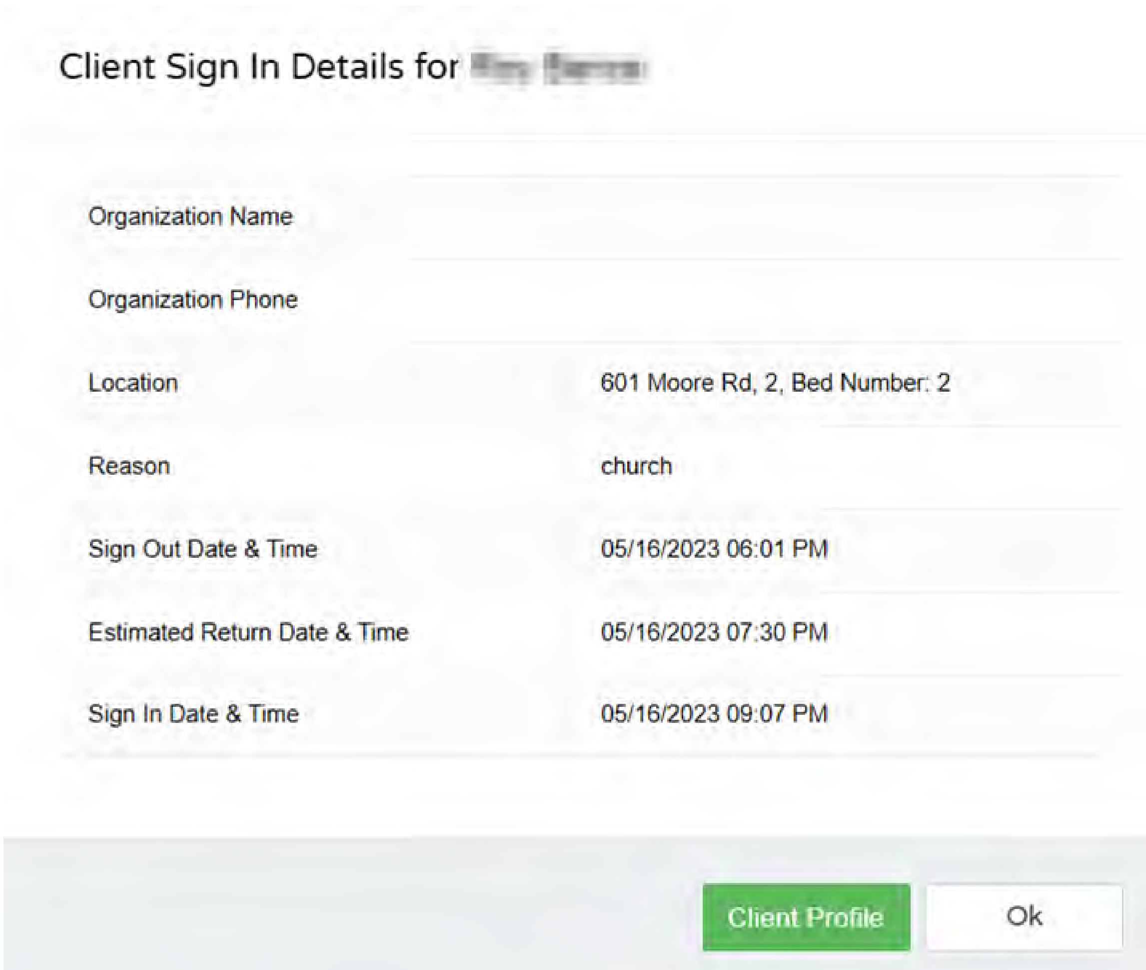
If your Organization has multiple locations within your city, you can view on your Dashboard combined data from all locations (units), or filter the data by location.

The default Dashboard filter for Staff is the location to which they have been assigned. If you assign Staff to House 1, their Dashboard will default to only showing data pertaining to clients in House 1. However, they can use the drop down box to view other location data.

The Administrator (Staff with Level 100) has an unfiltered default Dashboard view, showing data from all locations.

Sign In and Out

You can view at-a-glance who is signed in and out of the Location.

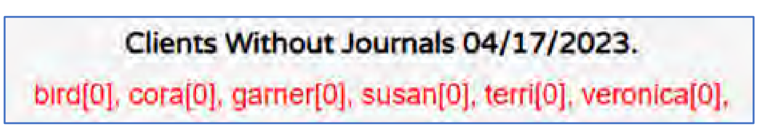


If you click on a Client image, a popup with their last sign in and out details appears.

You can also click a button to open and view their Client Profile page.

Click Ok to close the popup.

Clients Without Journals

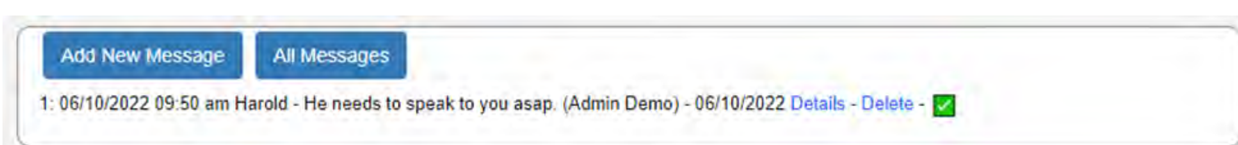


If you require your clients to journal their activities, this section gives you a quick glance to see who has completed any journals that day, and how many.

Large Buttons

- **Unread Chat Messages** – How many chat messages you have waiting for you.
- **Progress Notes added in Last 7 Days** – How many Clients have added Progress Notes to their Treatment Plan, detailing what they have done to work toward completing their Objectives.
- **Objectives Completed in Last 14 Days –** How many Objectives have been marked complete by Clients.
- **Tasks Due Today –** Tasks due on this day from all staff or clients (per filtered location).
- **Chores Due Today –** Chores assigned to be done today.
- **Chores To Be Verified –** Chores that clients have marked Complete that require verification by Staff.
- **Contact Requests –** Contact us form results, showing the number of unread results.

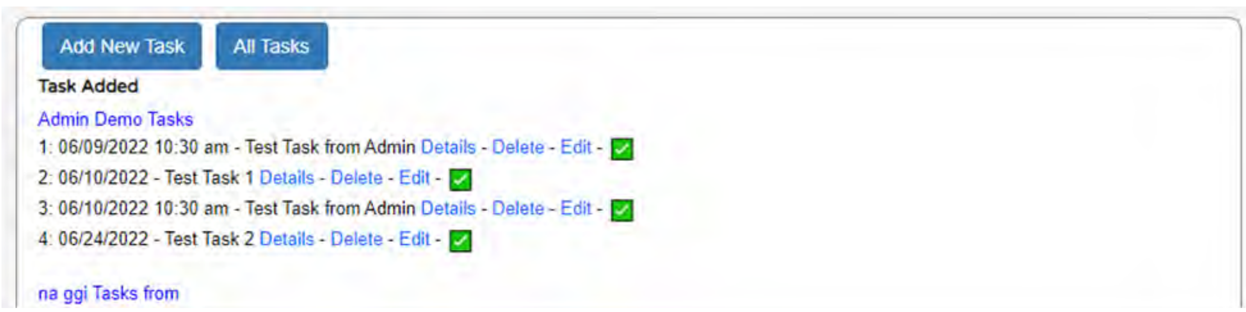
Messages



- **Add New Message –** Add a message to one or multiple Staff members which will be saved to each Recipient's Dashboard as well as sent via email.

  The Staff member can see the details, delete the message, or click the green check box to mark it as completed.
- **All Messages –** View all of the Staff messages.

Tasks



- **Add New Task –** Create a new task. Assign it to one or multiple people.
  Tasks can belong to a Project.
  If the task has a date, it will show up on the Task Calendar.
  If the task has a time, the time will show up on the Task Calendar.
  Once created, an email will be sent to the people assigned to the task.

  The Staff or Client options will depend upon who assigned the Task, but may include see the details, delete the task, Edit the Task, or click the green check box to mark it as completed.

  When the Task is completed, an email notification is sent to the person who assigned the task.

- **All Tasks –** View, edit, filter or delete all tasks.

Projects

- **Projects –** View each Project assigned to you. Options include see details, edit and click the green check box to mark it as completed.

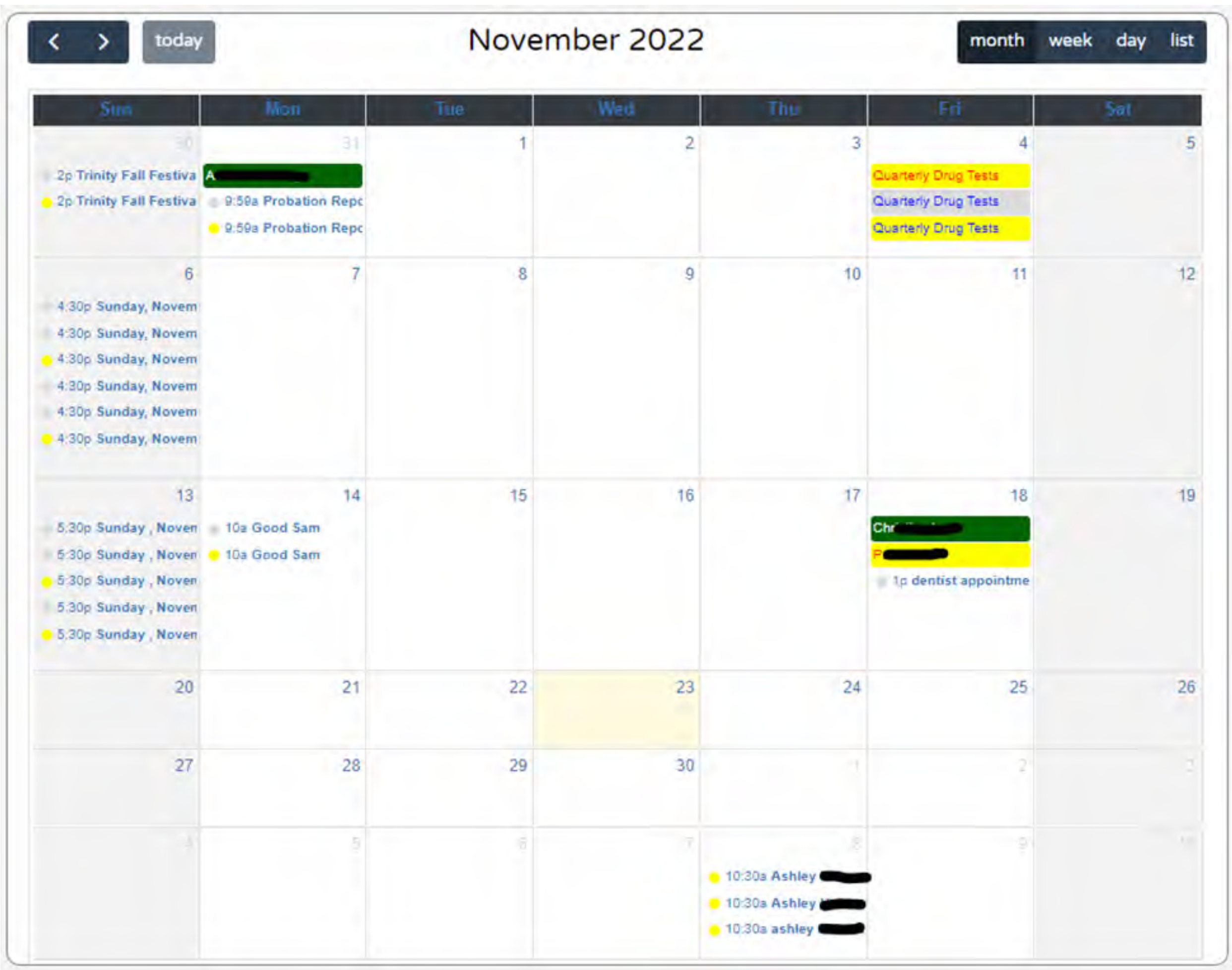
Chores

- **Assign Chore –** Assign chores to Clients and Staff. You can only assign one chore at a time, but you can assign more than one date and peron to a Chore.

Assignees, depending on who assigned the chore, can see details, edit and add notes, delete and click the green check box to mark it as completed

- **All Chores Assigned –** View, edit, filter or delete all chores assigned.

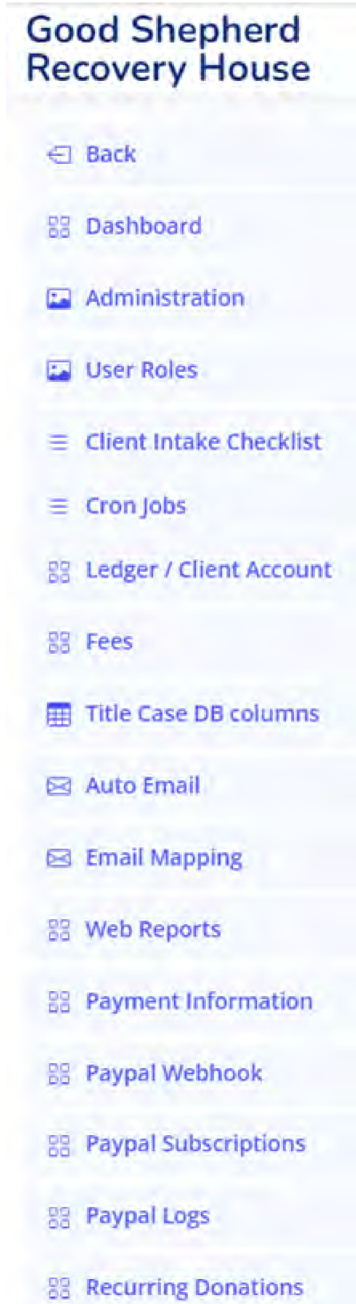
Task Calendar



- **Green Highlights –** Client birthdays.
- **Red Highlights –** Maintenance issues.
- **Yellow Highlights –** Past due and incomplete tasks.
- **Gray Highlights –** Completed tasks.

- **Red Font –** Task belongs to the current User.
- **Blue Font –** Task belongs to someone other than the current User.

ADMIN DASHBOARD



The list of options may change.

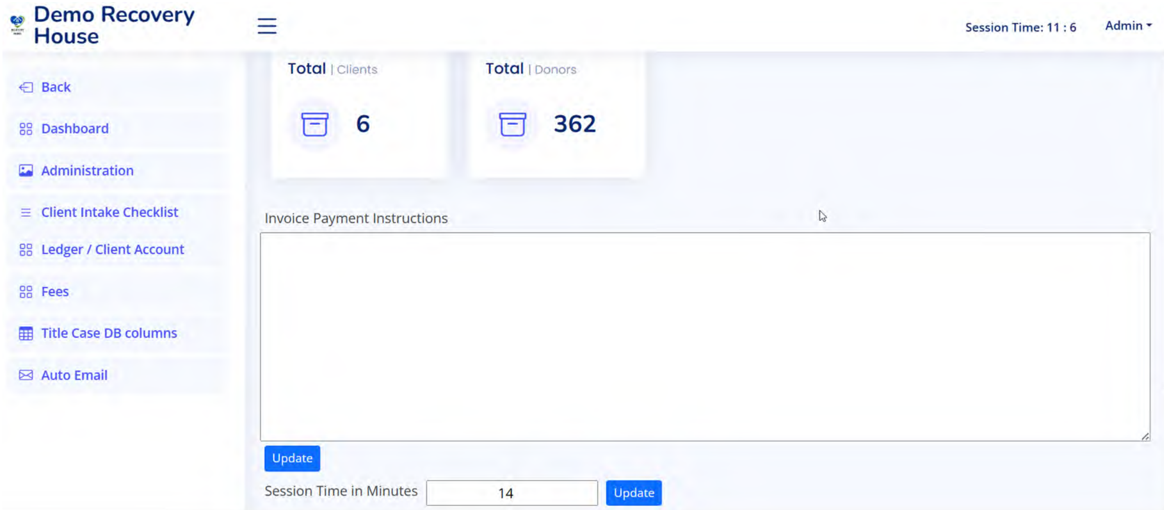
Back

This takes you back to the Main Dashboard.

Dashboard

The Admin Dashboard gives you an overview of your number of Clients and Donors.

Invoice Payment Instructions



Enter the Payment Instructions for your Invoices on the Administration Dashboard.

Contact Us Embed HTML Code


Contact us Form Html Code

<iframe src="https://rhs.recoveryhousesoftware.com/contact_form.php?id=DRHS1" height="100%" width="100%"></iframe>

Copy to Clipboard

Contact us Form Link Code

<h2>New Client Inquiry Form</h2>

Copy to Clipboard


Good Shepherd Recovery House

601 Moore Rd, Jasper, GA 30143

Mailing Address: PO Box 328, Holly Springs, GA 30142-0006

Phone: 678-459-2346 Fax: 888-826-6972

https://gsrecovery.org

Client Information

Client First Name: *

First Name is Required

Client Middle Name:

Client Last Name: *

Last Name is required.

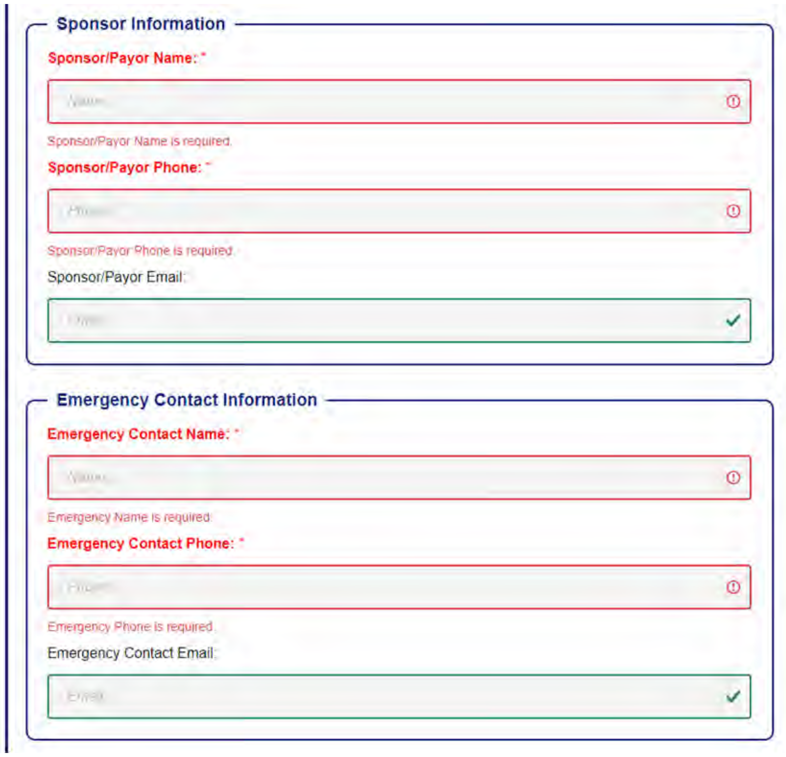
Client Date of Birth: (mm/dd/yyyy) *

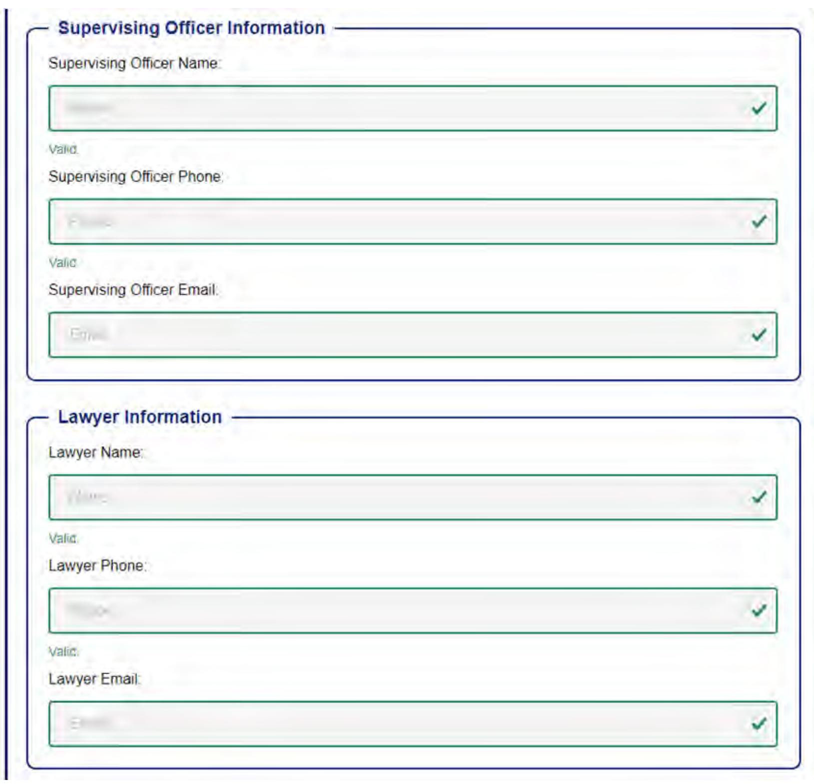
Date of Birth is required.

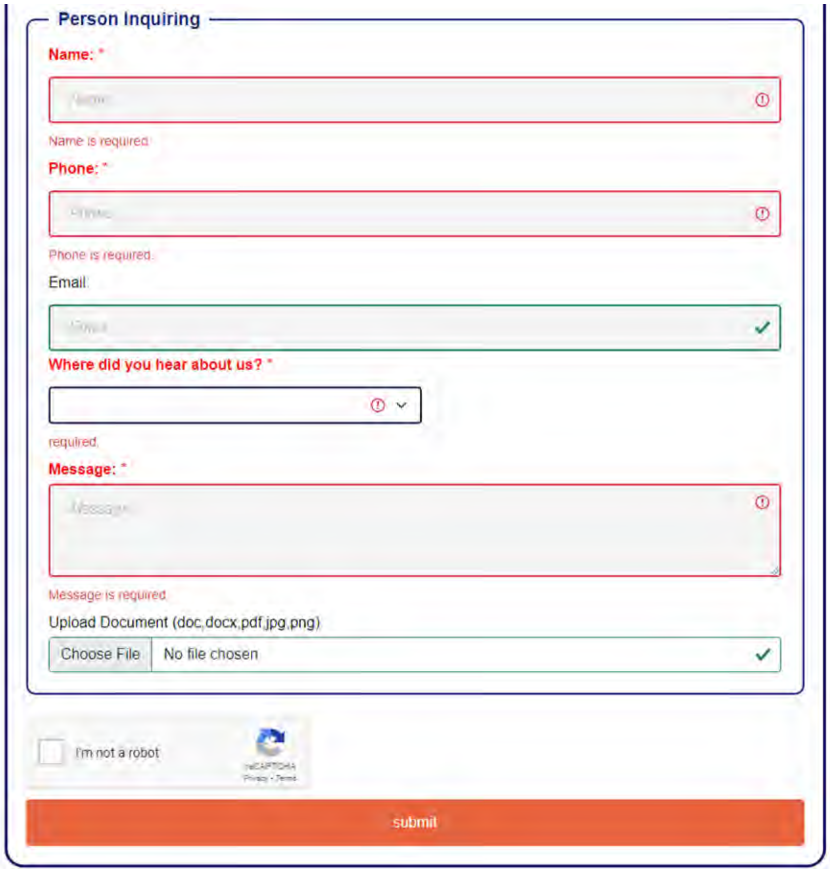
Client Drug(s) of Choice: *

Durg(s) of Choice is required.

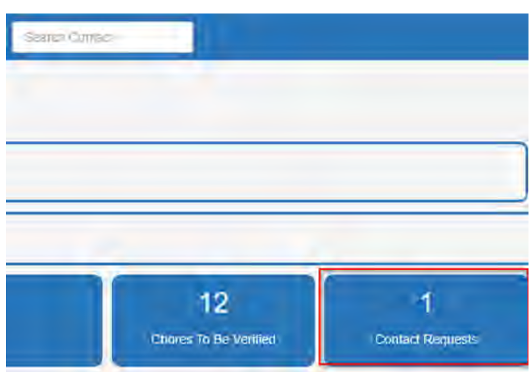
Incarceration Location (City, County, State): *


Sponsor Information
Sponsor/Payor Name: *
Sponsor/Payor Name is required.
Sponsor/Payor Phone: *
Sponsor/Payor Phone is required.
Sponsor/Payor Email:
Emergency Contact Information
Emergency Contact Name: *
Emergency Name is required.
Emergency Contact Phone: *
Emergency Phone is required.
Emergency Contact Email:

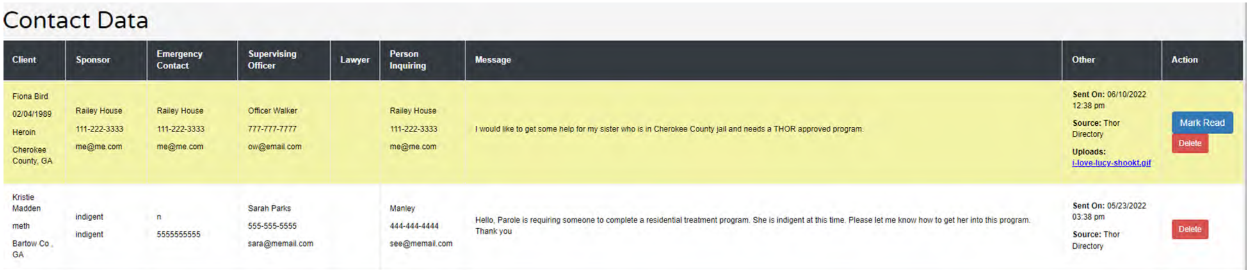

Supervising Officer Information
Supervising Officer Name:
Valid.
Supervising Officer Phone:
Valid.
Supervising Officer Email:
Lawyer Information
Lawyer Name:
Valid.
Lawyer Phone:
Valid.
Lawyer Email:



It also provides you with HTML code to place our Contact Us form (or link to our Contact Us form) on your web site so Client Prospects can send initial information, automatically creating a Client Prospect record in the database.



You can retrieve Contact Us message details from the main Dashboard from the far right Large Button labeled Contact Requests.

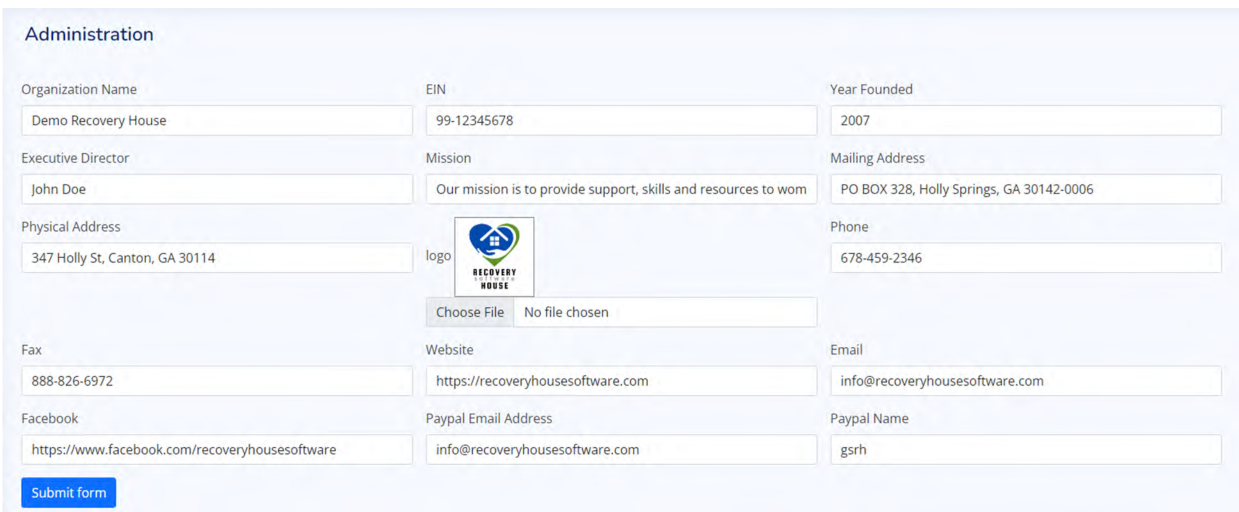


Contact Data

Client	Sponsor	Emergency Contact	Supervising Officer	Lawyer	Person Inquiring	Message	Other	Action
Fiona Bird 02/04/1989 Heroin Cherokee County, GA	Railey House 111-222-3333 me@me.com	Railey House 111-222-3333 me@me.com	Officer Walker 777-777-7777 ow@email.com		Railey House 111-222-3333 me@me.com	I would like to get some help for my sister who is in Cherokee County jail and needs a THOR approved program.	**Sent On:** 06/10/2022 12:38 pm **Source:** Thor Directory **Uploads:** i-love-lucy-shookt.gif	Mark Read Delete
Kristie Madden meth Bartow Co., GA	indigent indigent	n 5555555555	Sarah Parks 555-555-5555 sara@memail.com		Manley 444-444-4444 see@memail.com	Hello, Parole is requiring someone to complete a residential treatment program. She is indigent at this time. Please let me know how to get her into this program. Thank you	**Sent On:** 05/23/2022 03:38 pm **Source:** Thor Directory	Delete

The contact information is also emailed to the main Administrative email address entered into the Administration section of the Admin Dashboard (see next section).

Administration

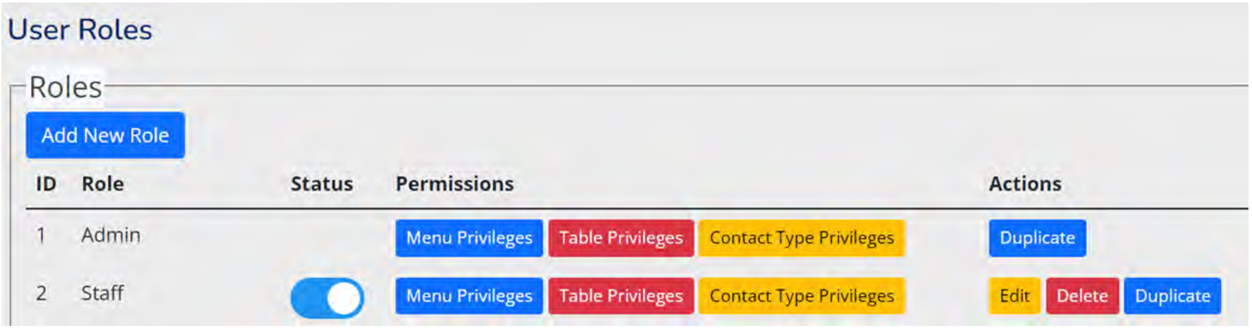


Administration

Organization Name: Demo Recovery House
EIN: 99-12345678
Year Founded: 2007
Executive Director: John Doe
Mission: Our mission is to provide support, skills and resources to wom
Mailing Address: PO BOX 328, Holly Springs, GA 30142-0006
Physical Address: 347 Holly St, Canton, GA 30114
logo
Choose File No file chosen
Phone: 678-459-2346
Fax: 888-826-6972
Website: https://recoveryhousesoftware.com
Email: info@recoveryhousesoftware.com
Facebook: https://www.facebook.com/recoveryhousesoftware
Paypal Email Address: info@recoveryhousesoftware.com
Paypal Name: gsrh
Submit form

The Administration form is the source for your signature lines, report header, logo, main contact information, main email, and other potentially used information.

User Roles



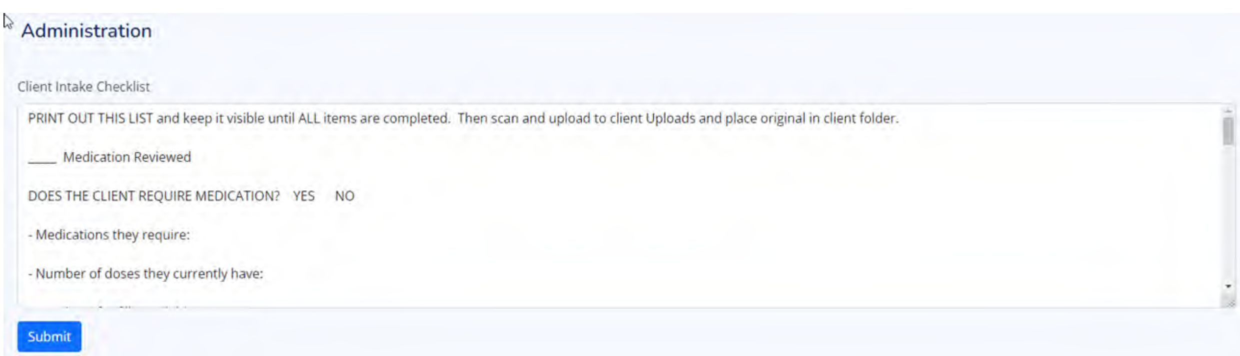
There are 2 default Roles – Admin, which can be edited and duplicated but not deleted, and Staff, which can be edited, duplicated and deleted.

Menu privileges show which options are on the top menu, as well as on the Contact Page.

Table Privileges determine what table level privileges Staff has.

Contact Type Privileges determine which Contacts Staff can access. Some Staff may still be on probation, and they are not allowed to access other client files who are under supervision. You can block Staff from accessing Client files.

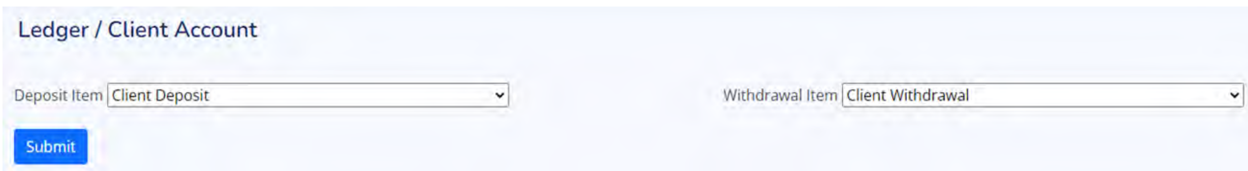
Client Intake Checklist



If you have a checklist of items to be completed for each new intake, you can enter it here.

Whenever a Contact is changed from Client Prospect to Client, this checklist is sent to any email (or email distribution list) you determine. You will enter the chosen email into the Admin Auto Email section.

Ledger / Client Account

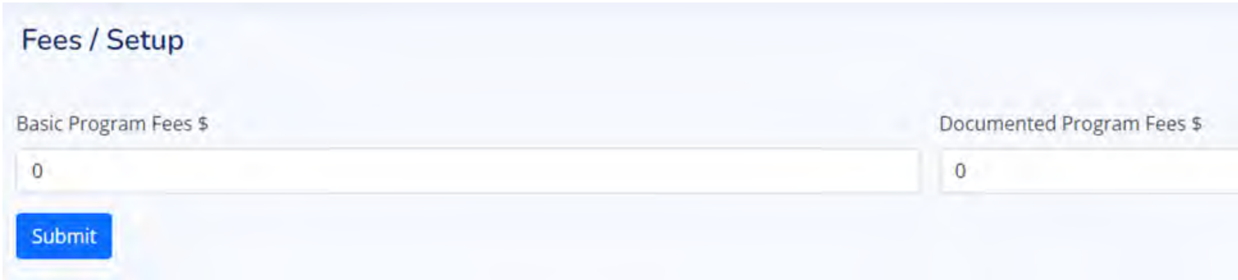


If you are using a separate Bank Account to handle your Clients' money, the Ledger will act as a Checkbook to track their money. Clients can create Ledgers from their Dashboard and view their charges, deposits and withdrawals. Staff can enter charges as well as monies deposited or withdrawn.

If you are using the Ledger module to reconcile a joint Client Bank Account, select from the drop-down boxes which Item will be used for actual monies deposited or withdrawn from the Client Bank Account. The default is Client Deposit and Client Withdrawal.

This allows the program to differentiate between charges the client has accrued (purchases on the client's behalf, drug tests, etc.) and actual money deposited or withdrawn from the joint Client Bank Account.

Fees



In the Custom Report Templates, there are placeholders that can be used to import certain data:

AUTO-FILL TERMS: CLIENT_ORGANIZATION, CLIENT_NAME, INTAKE_DATE, DISCHARGE_DATE, CLIENT_FIRST_NAME, CLIENT_ADDRESS, LAST_DONATION, BASIC_PROGRAM_FEES, DOCUMENTED_PROGRAM_FEES, LEDGER_BALANCE, LEDGER_DETAILS, WAGES_BALANCE, TOTAL_BALANCE_D, TOTAL_BALANCE_B, CLIENT_PHOTO

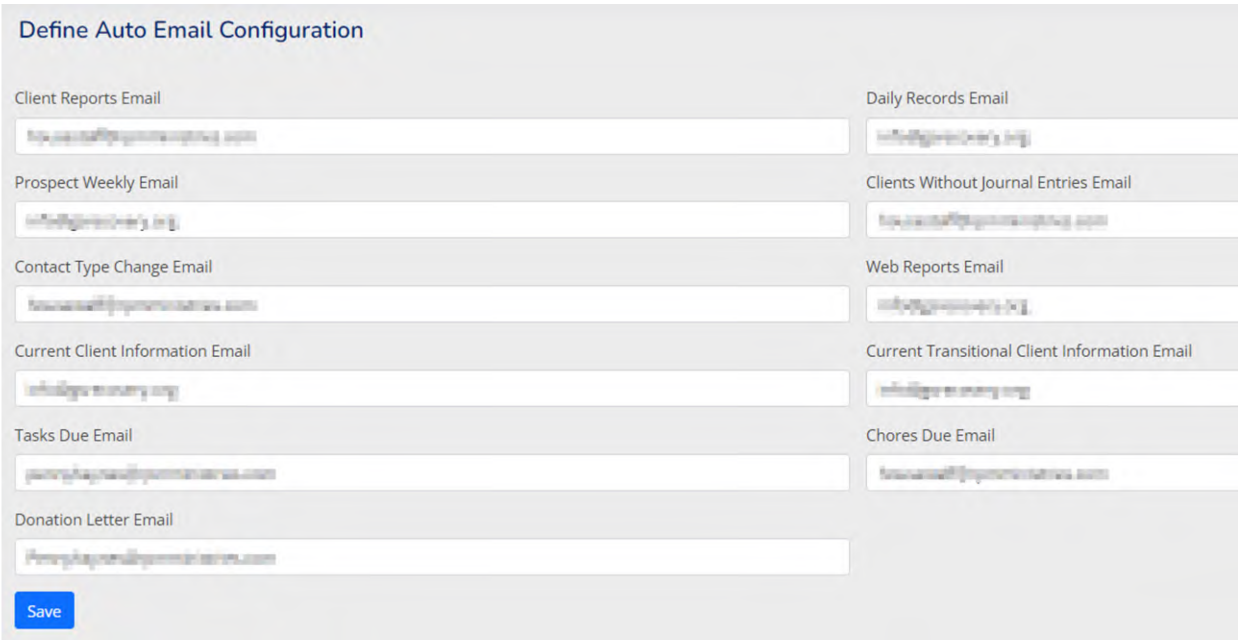
Two of those placeholders are Basic Program Fees and Documented Program Fees. Basically, they are 2 different levels of Program Fees, and the fields on this form determine what amounts are associated with Basic Program Fees and Documented Program Fees

Title Case DB Columns

Quality control is required with multiple Users entering data. Data may be entered in all caps or no caps, and anything in between.

This function allows you to clean up data, especially Contact Names and/or Addresses, and change them to Title Case – a capital letter at the beginning of each word. So *mary a. lawrence* or *MARY A. LAWRENCE* becomes *Mary A. Lawrence*. However, McDonald will become Mcdonald as well.

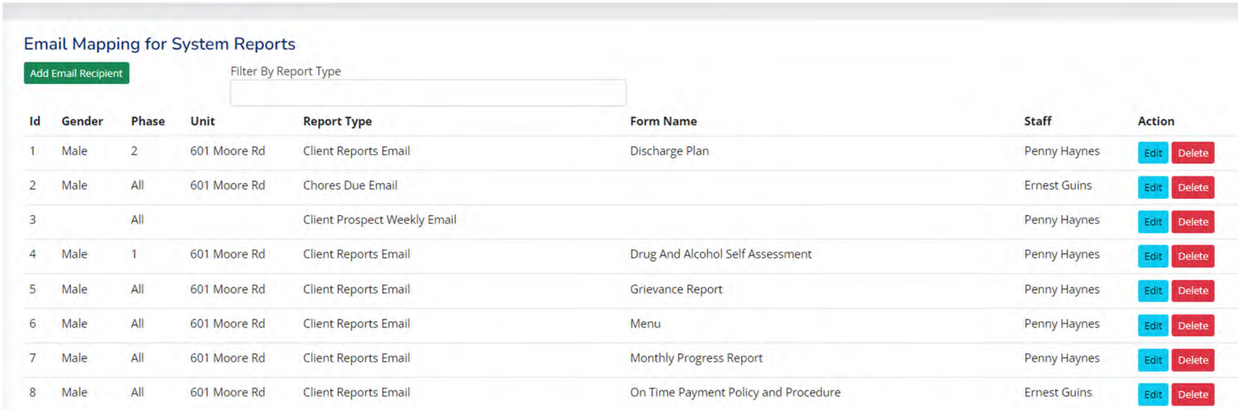
Auto Email



This section allows you to determine which email address will receive the listed Administrative (all locations) Reports IF it is NOT MAPPED elsewhere on the Email Mapping page. You can create email distribution lists via your email program to send one report to multiple people.

If you leave it blank, you will not get an Administrative version of the Report.

Email Mapping

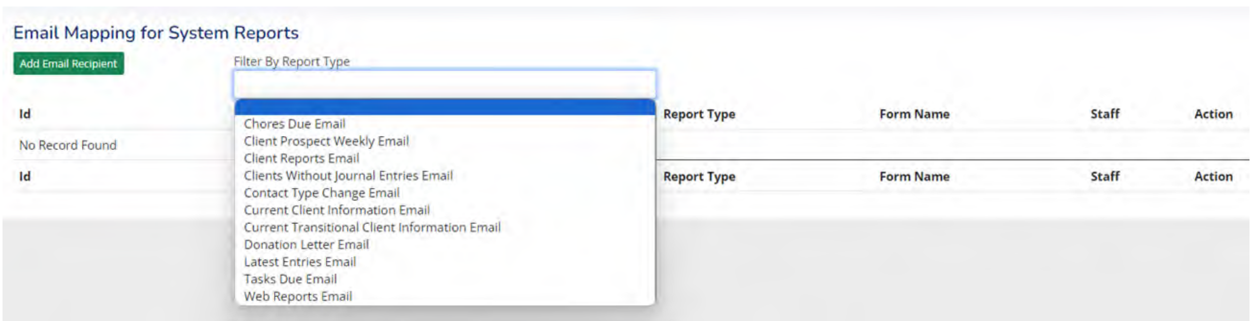


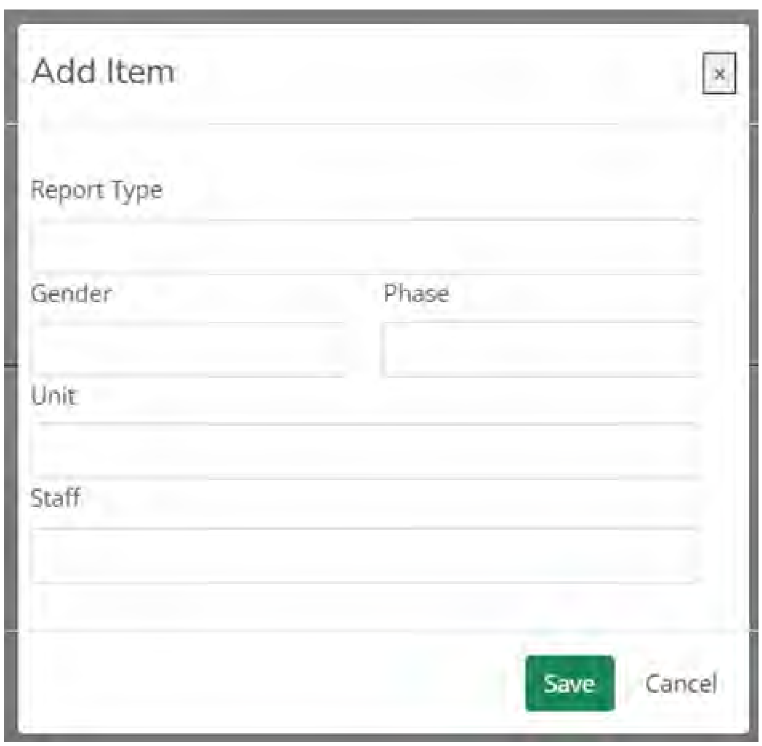
Email Mapping for System Reports

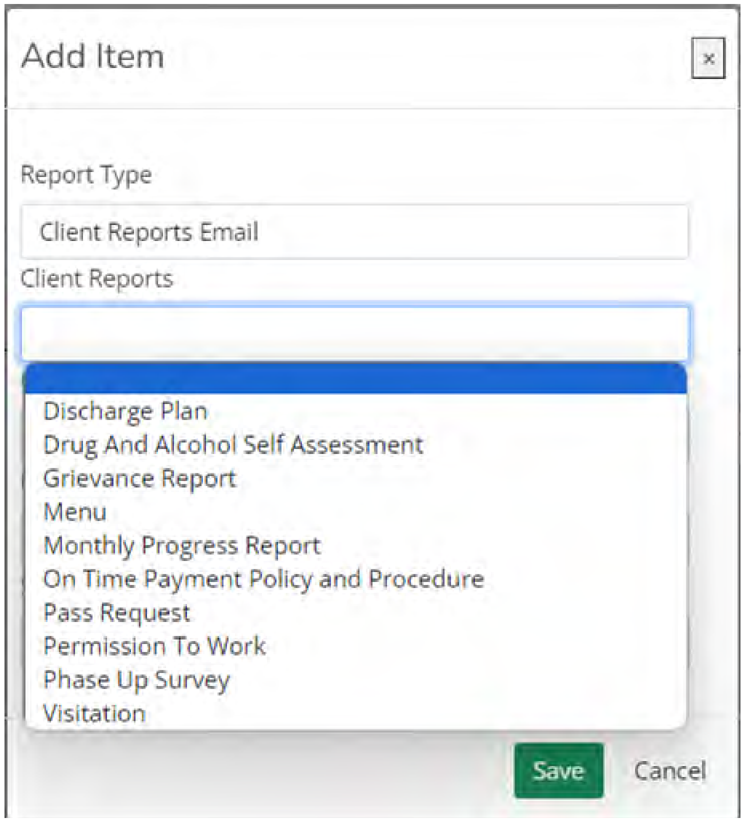
Add Email Recipient

Filter By Report Type

Id	Gender	Phase	Unit	Report Type	Form Name	Staff	Action
1	Male	2	601 Moore Rd	Client Reports Email	Discharge Plan	Penny Haynes	Edit Delete
2	Male	All	601 Moore Rd	Chores Due Email		Ernest Guins	Edit Delete
3		All		Client Prospect Weekly Email		Penny Haynes	Edit Delete
4	Male	1	601 Moore Rd	Client Reports Email	Drug And Alcohol Self Assessment	Penny Haynes	Edit Delete
5	Male	All	601 Moore Rd	Client Reports Email	Grievance Report	Penny Haynes	Edit Delete
6	Male	All	601 Moore Rd	Client Reports Email	Menu	Penny Haynes	Edit Delete
7	Male	All	601 Moore Rd	Client Reports Email	Monthly Progress Report	Penny Haynes	Edit Delete
8	Male	All	601 Moore Rd	Client Reports Email	On Time Payment Policy and Procedure	Ernest Guins	Edit Delete







This page allows you to map email recipients for every automated report, client report and web reports), and filter the information in each report by Gender, Phase, and Unit Location.

You can select the Report (if it has sub-reports, you will select that sub report).

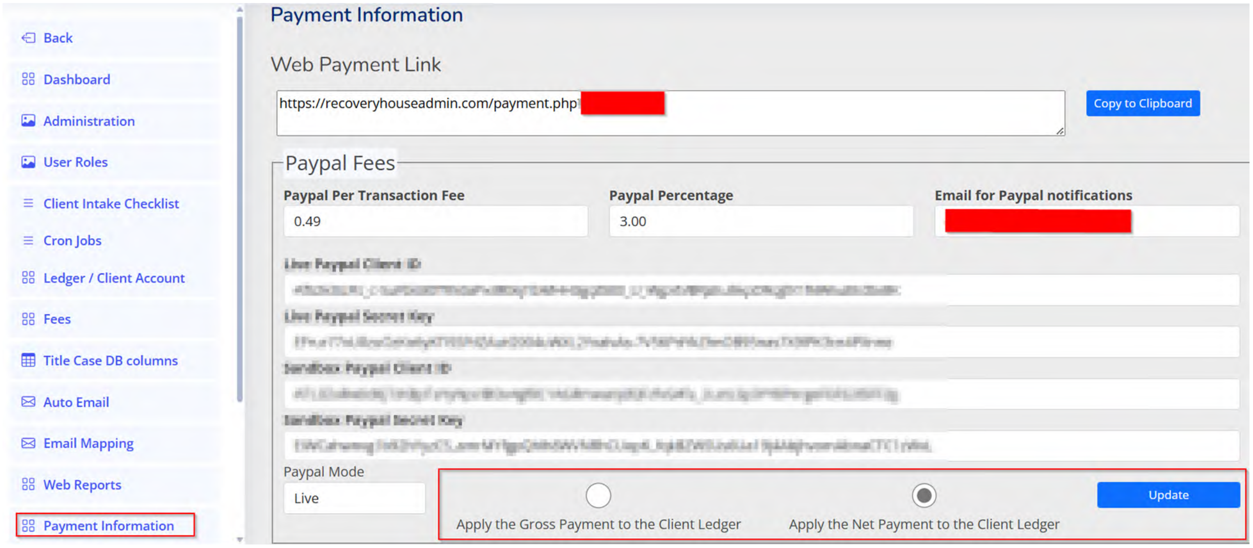
Then select Gender, Phase (you can select ALL phases), the Unit location and the Staff Member who should receive it. Press Save.

This way, you can send the FILTERED reports to specified staff during different phases of the client's recovery.

IF YOU DO NOT MAP A REPORT, the system will look and see if you put an email for that report under Auto Email and send an Administrative Report with ALL RECORDS for all locations to that email address.

IF YOU DO NOT ENTER AN EMAIL IN AUTO EMAIL, you will not get an Administrative Report.

Payment Information



This section controls the Paypal Payment Page options so Clients, Sponsors and Donors can make payments which automatically create Operating Account Transactions in the database.

You determine if Payments sent on behalf of Clients will have the GROSS or the NET amount applied to the Client's Ledger.

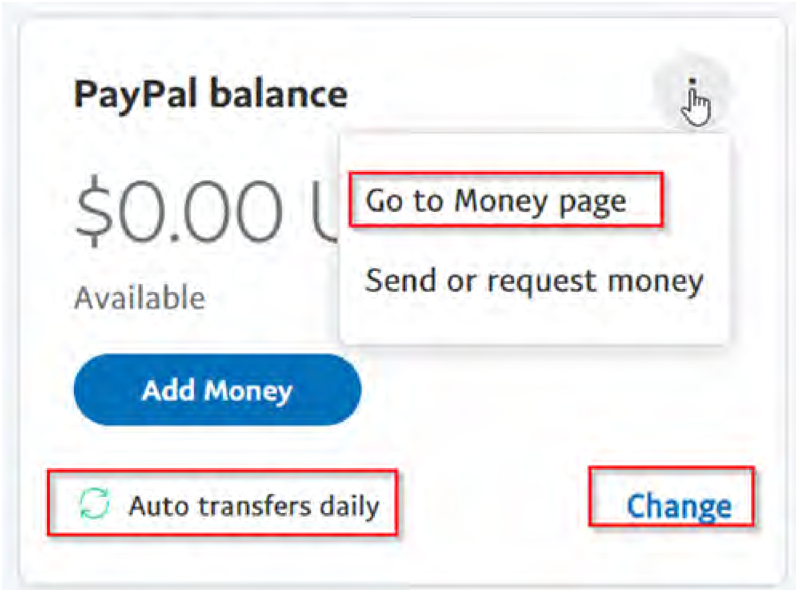
If you add Paypal Fees (you make the Customer pay the additional fees) in the Add New Item form, then you should select NET.

If you are NOT adding Paypal Fees, but are applying the full payment to the Client Ledger, then select GROSS.

You determine if Payors also pay associated Paypal fees and how much.

Paypal gives your Payors the option to use a Paypal Account OR use any debit or credit card (including a CashApp debit card).

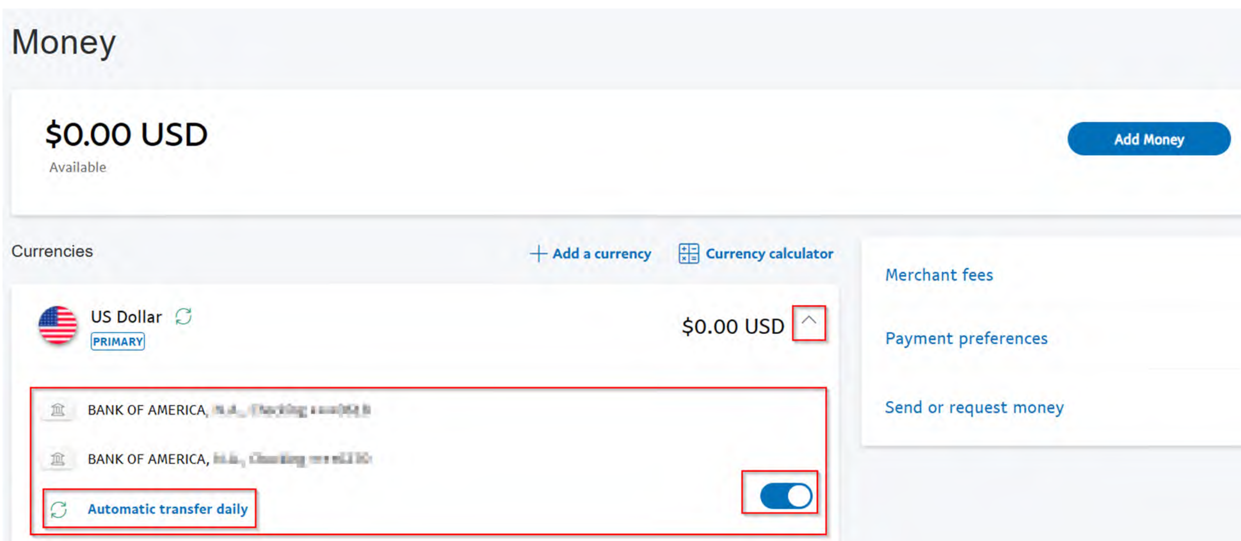
Paypal Auto Transfer



Paypal Business accounts have the option to automatically transfer balances to your bank account on a daily basis, making taking payments even easier.

On the Home Page, underneath your balance, you can edit your options.

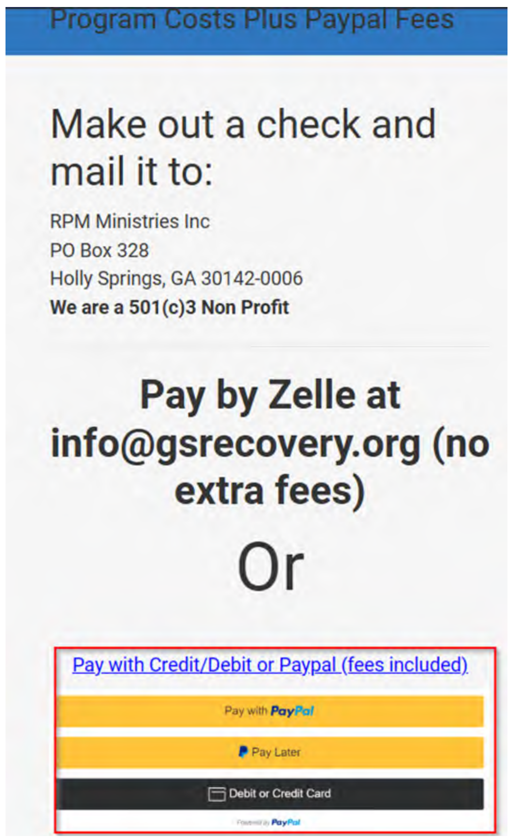
To set it up, to go the Money page and click the arrow across from your currency selection. Then turn on the feature.



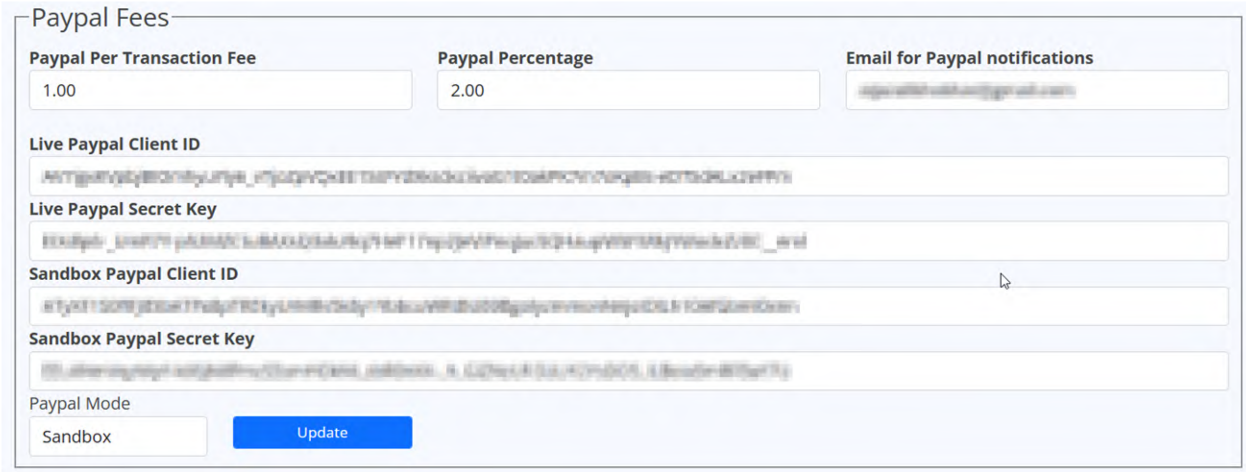
Web Payment Link

Click Copy to Clipboard to put your external Payment Page link on your web site and in any documentation so people can pay from the any browser.

Below is an example of using it on your web site. We used a picture of the Paypal Button and attached this URL to the image. (We will provide you with the image if you desire, and help you add this to your web site.)



Paypal Fees

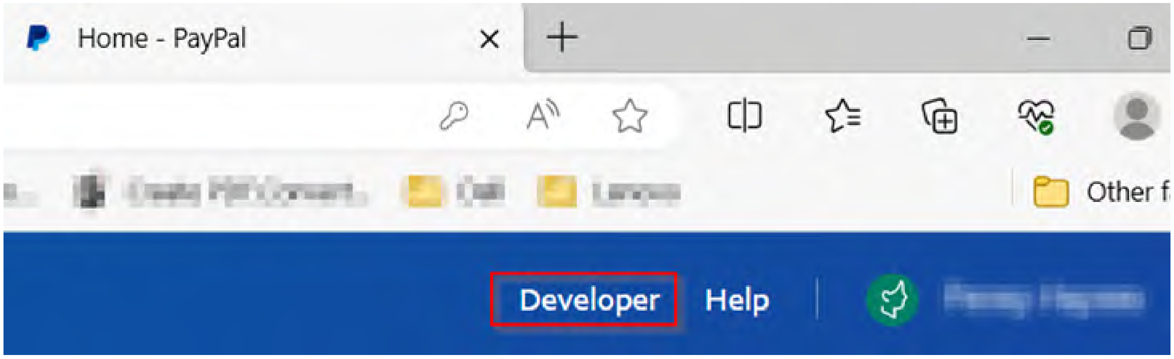


In this section, you can

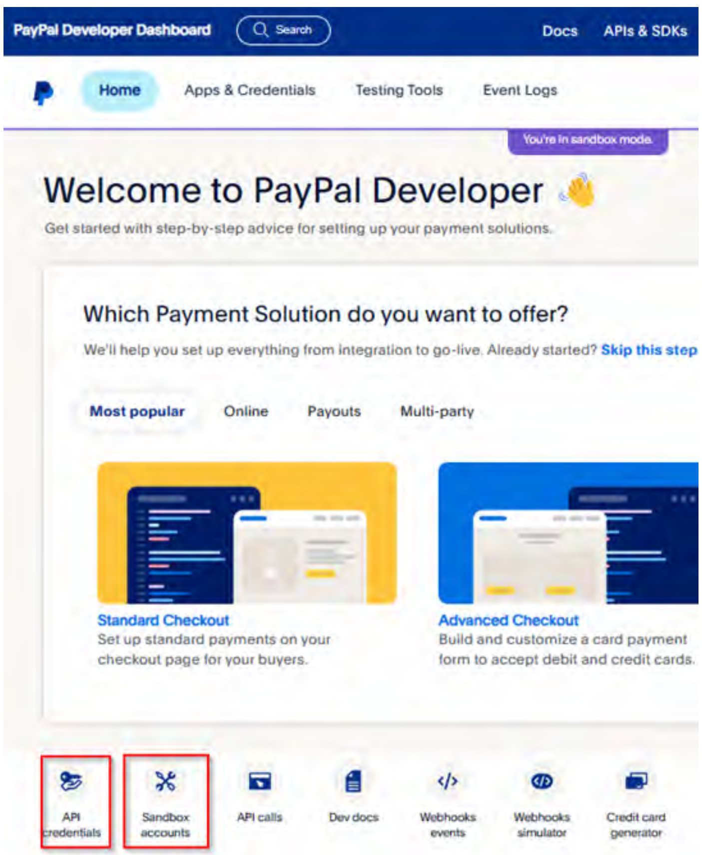
1) Add Paypal fees that can be added to your prices to cover the merchant fees. You can enter your Paypal Transaction Fee and Percentage, but it may be a little short. So play with the combination of fee and percentage until it covers your fees. Your clients only see the TOTAL fee that is added, not how it is calculated.

2) Enter your Paypal Live and Sandbox Client ID and Secret Key. This allows you to receive payments from Paypal through our software in either practice (Sandbox) mode or Live mode. ****We will help you set this all up for FREE – just ask.****

Paypal Client ID and Secret Key



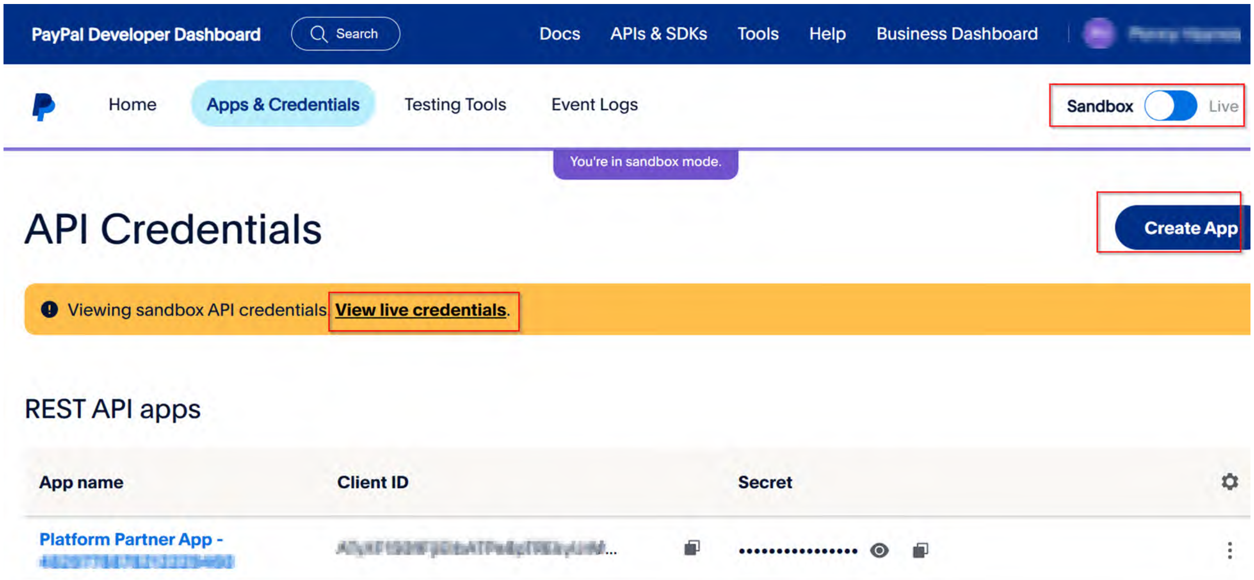
To find your Client IDs and Secret Keys, log into your Paypal account and click on Developer at the top of the page.



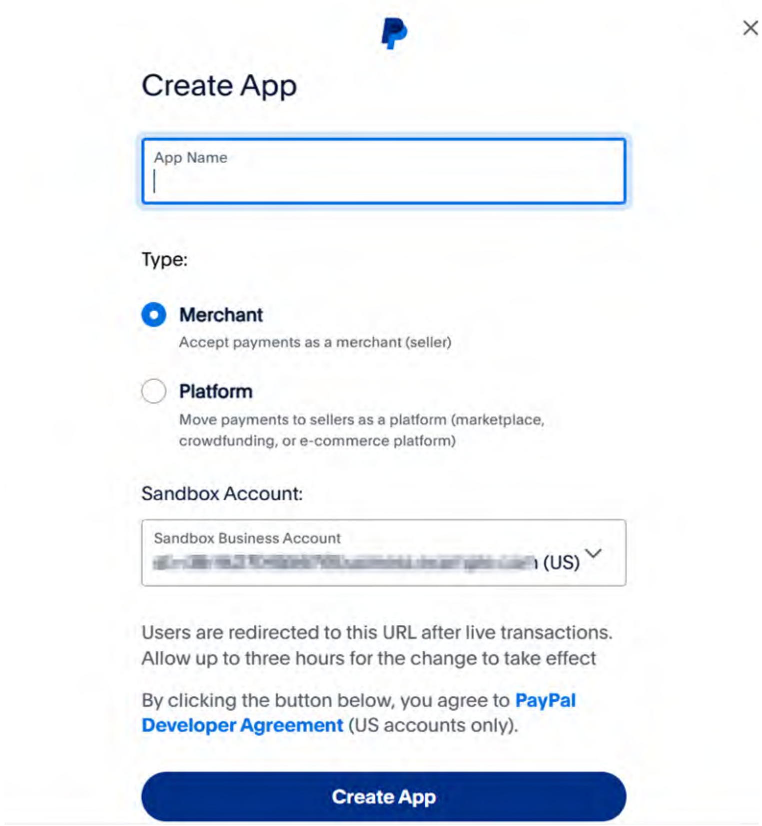
To set up your Client ID and Secret ID, click on **API credentials**.

Click Sandbox Accounts to see email addresses you can use to make test payments in Sandbox mode.

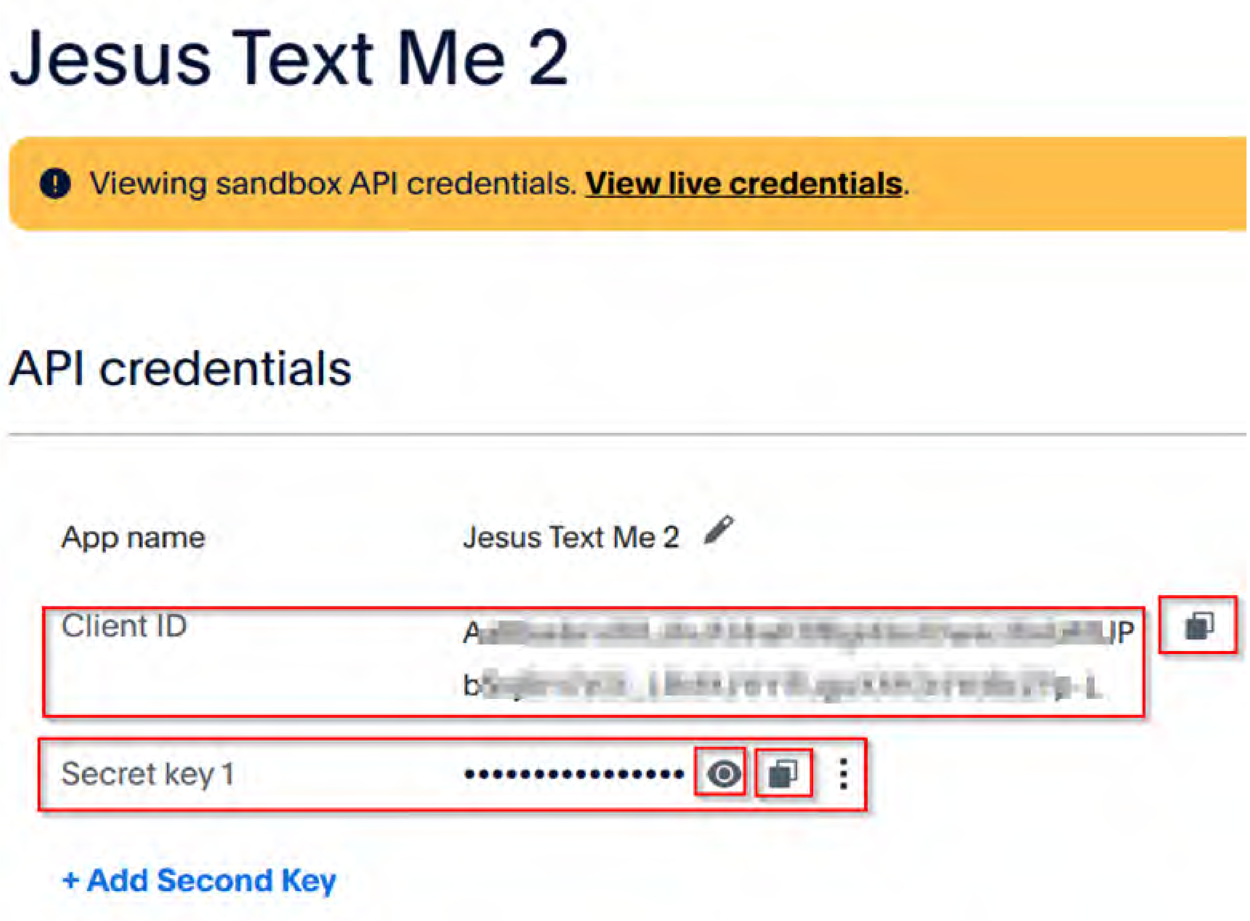
API CREDENTIALS page



Here you can click CREATE APP to set up your credentials.



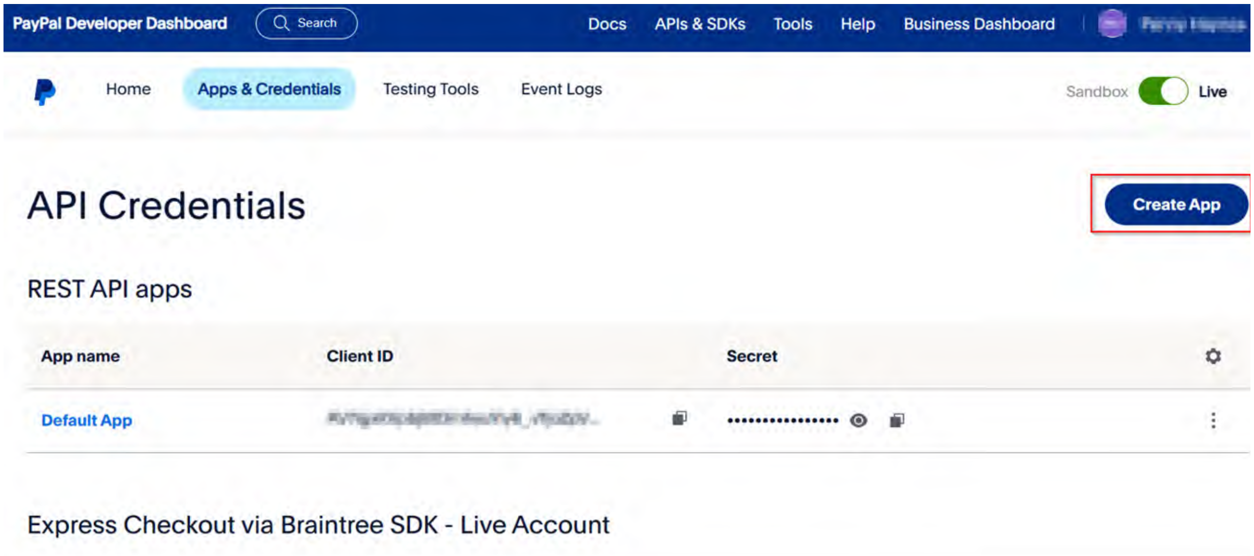
1) Add your Business name under App Name.
2) Select Merchant
3) Click Create App



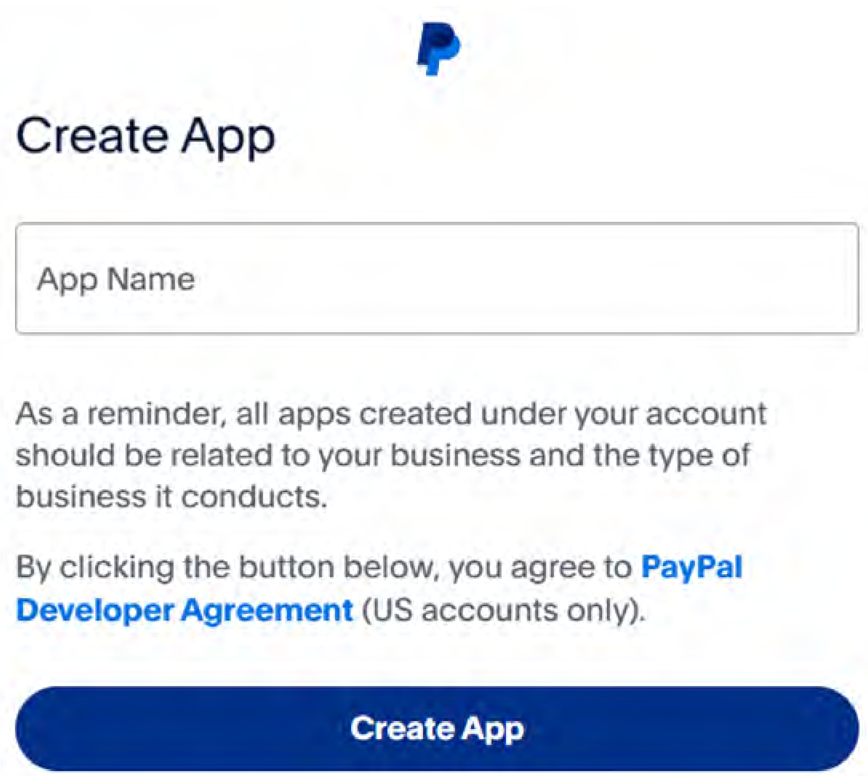
You will then see your Sandbox Client ID and Secret Key. You can copy it by clicking on the 2 boxes icon, and see your Secret Key by clicking on the eye icon.

Past it into the Admin Dashboard Payment Page for Sandbox Client ID and Secret Key.

Click on **View Live Credentials** to do the same with your Live Client ID and Secret Key.

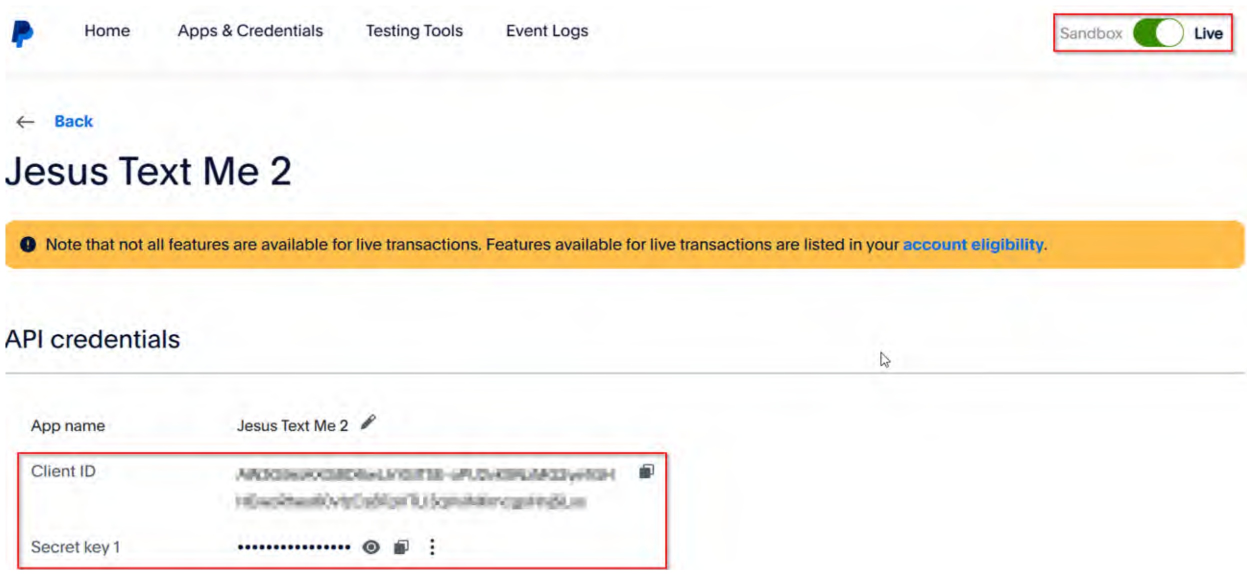


1) Click Create App



2) Enter your Business Name.

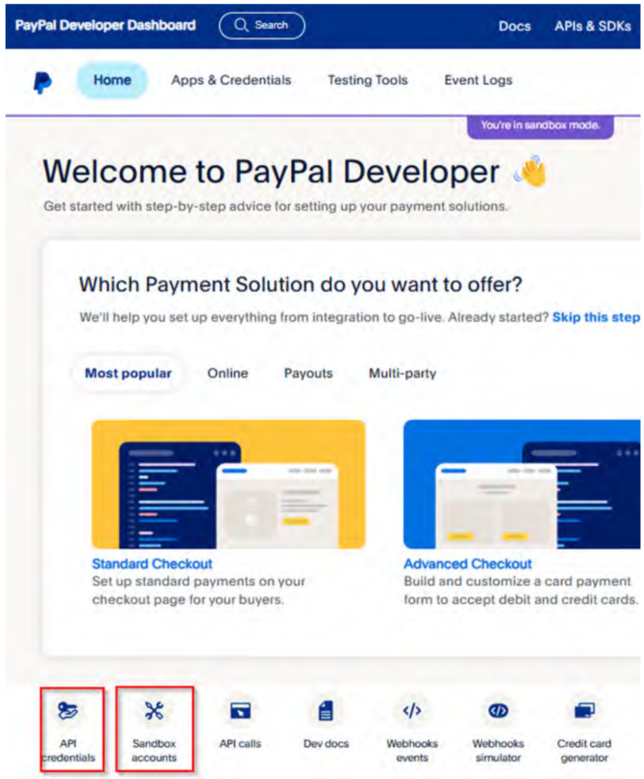
3) Click Create App



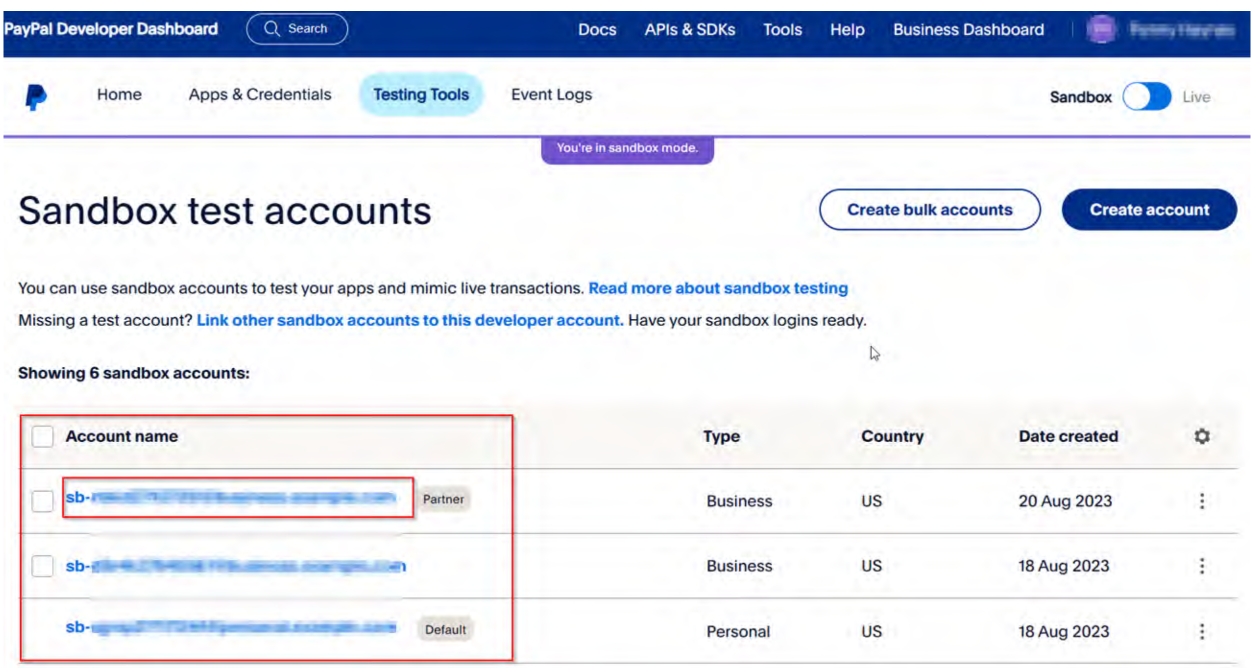
Copy the Client ID and Secret Key to the Admin Dashboard Payment Page Live Client ID and Secret Key fields.

There is a Paypal Mode drop down box below those fields where you select if you want to use Live or Sandbox right now. You can change it back and forth.

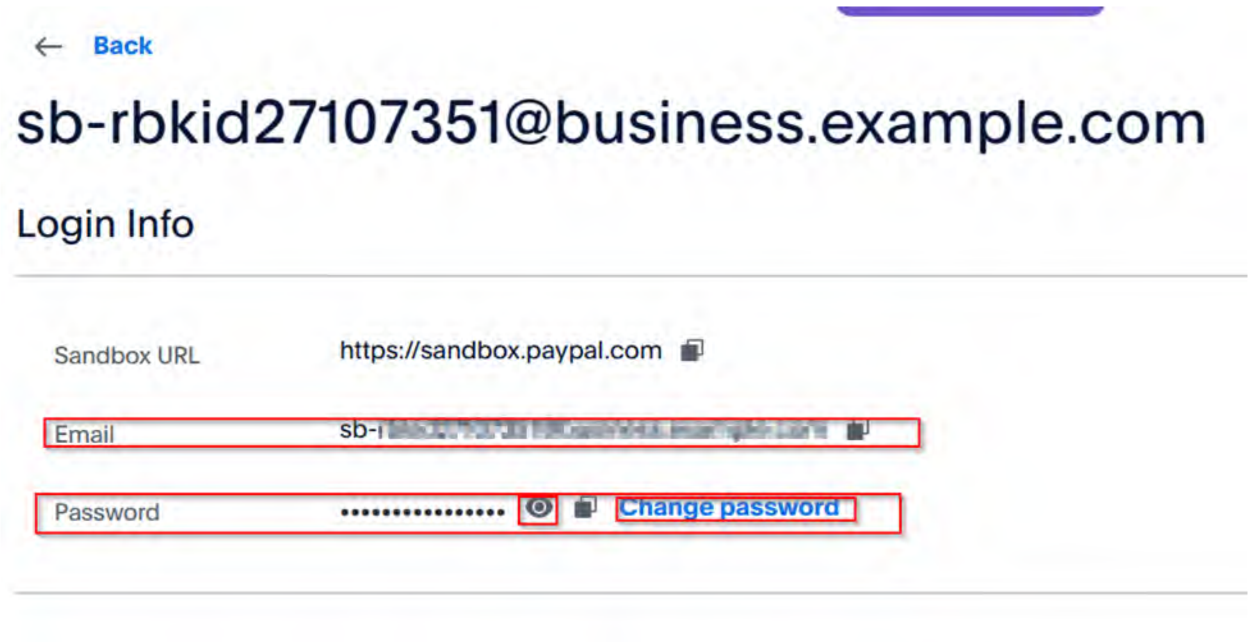
Emails to use with your Sandbox Account



Click Sandbox Accounts.



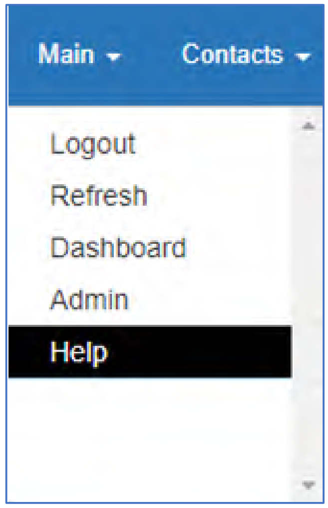
Click on which Sandbox Email you want to use for Testing the system and access/edit the Password.

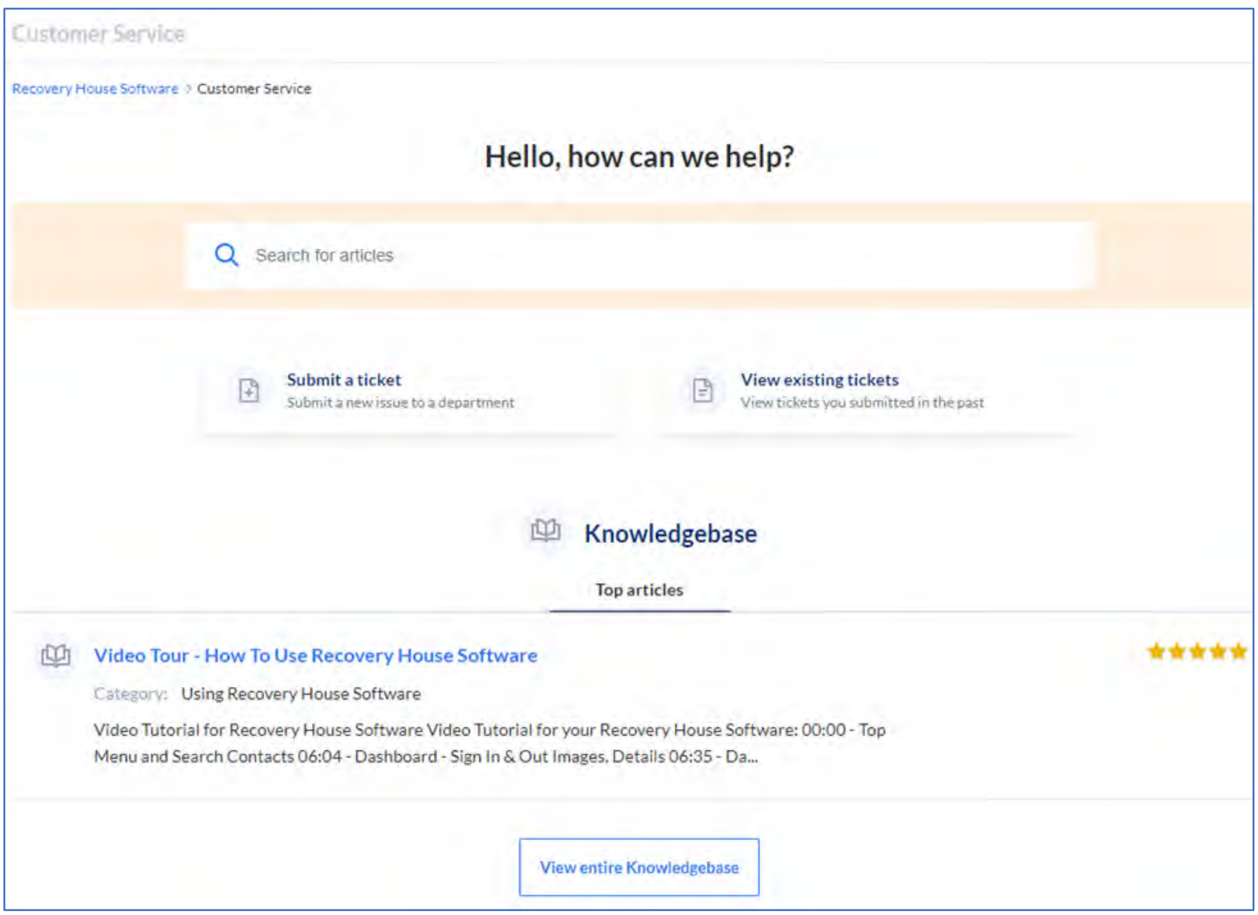


Click on the boxes to copy the Email address or Password to use for logging in when you test purchases in Sandbox. You can view, copy and change the password so it is easier to remember.

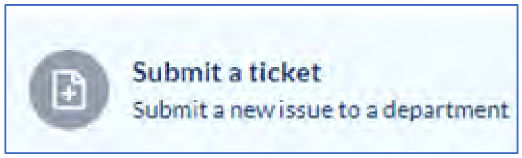
Save it somewhere to re-use for each test purchase.

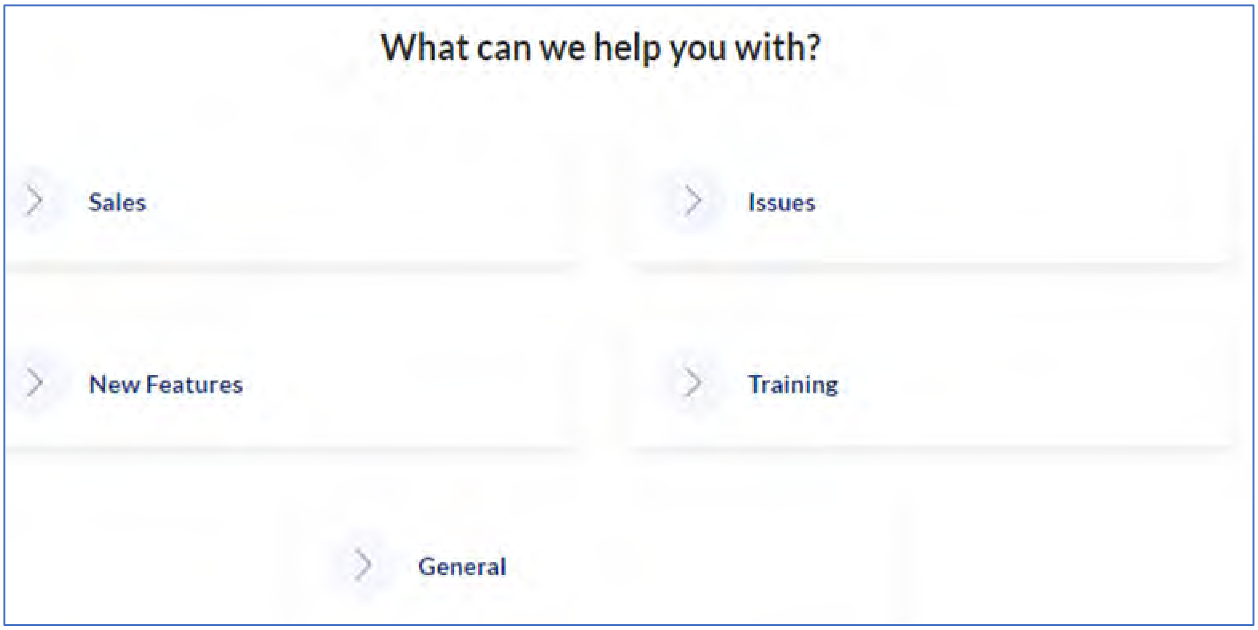
HELP


Main
Contacts
Logout
Refresh
Dashboard
Admin
Help


Customer Service
Recovery House Software > Customer Service
Hello, how can we help?
Search for articles
Submit a ticket
Submit a new issue to a department
View existing tickets
View tickets you submitted in the past
Knowledgebase
Top articles
Video Tour - How To Use Recovery House Software
Category: Using Recovery House Software
Video Tutorial for Recovery House Software Video Tutorial for your Recovery House Software: 00:00 - Top Menu and Search Contacts 06:04 - Dashboard - Sign In & Out Images, Details 06:35 - Da...
View entire Knowledgebase

Submit A Ticket



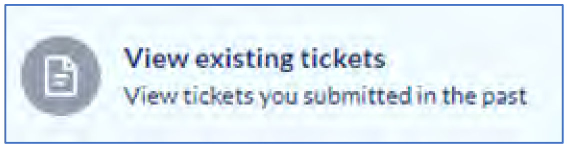


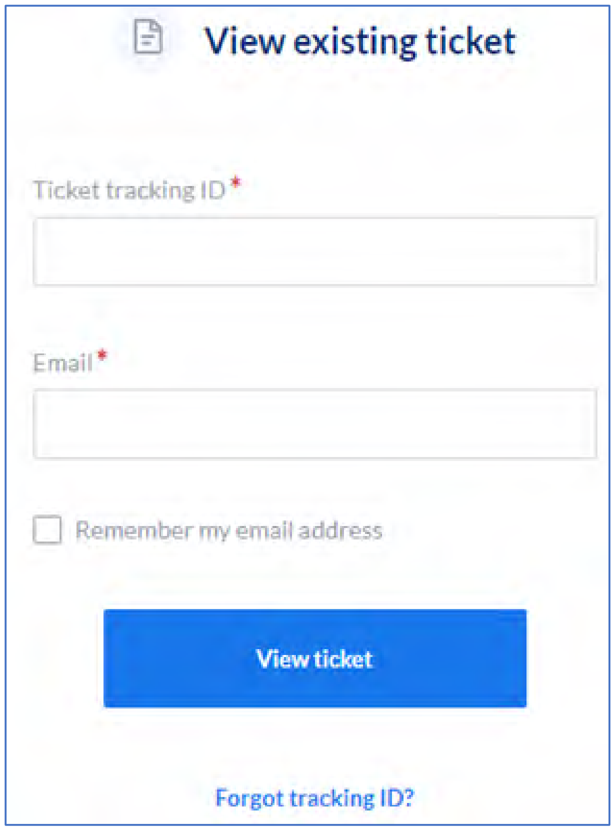
Our HelpDesk allows you to **Submit a Ticket** to Customer Support for any questions you have.

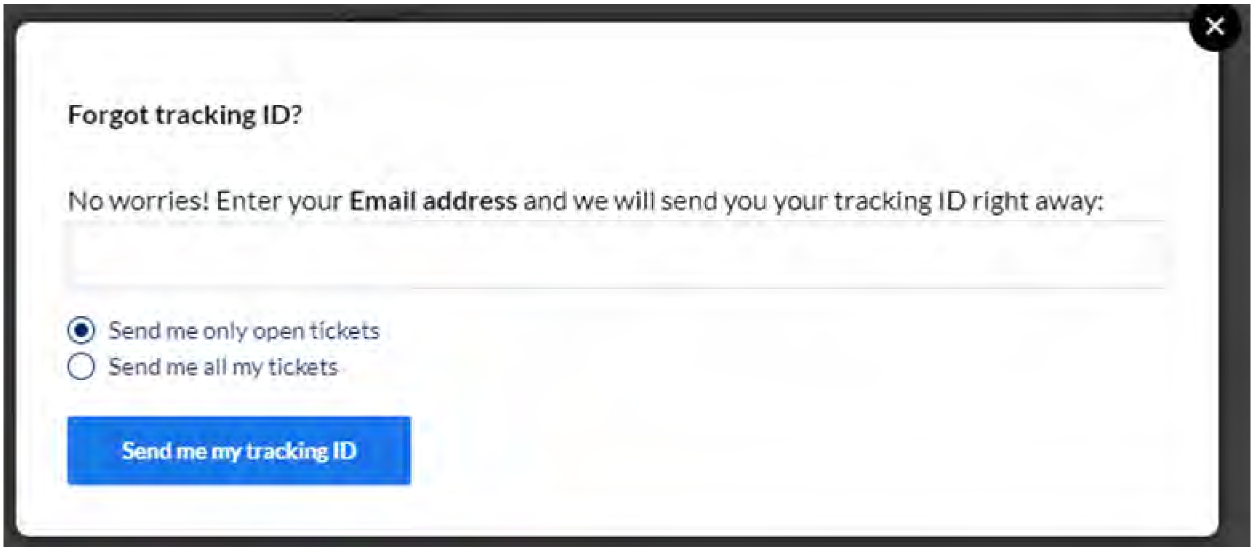
Select which category best suits your question:

- **Sales** – Anything to do with purchasing Recovery House Software.
- **Issues** – Software problems that need to be corrected.
- **New Features** – Ideas to improve the software.
- **Training –** Setting up a Training session to use the software.
- **General –** Any other questions or comments.

View Existing Tickets

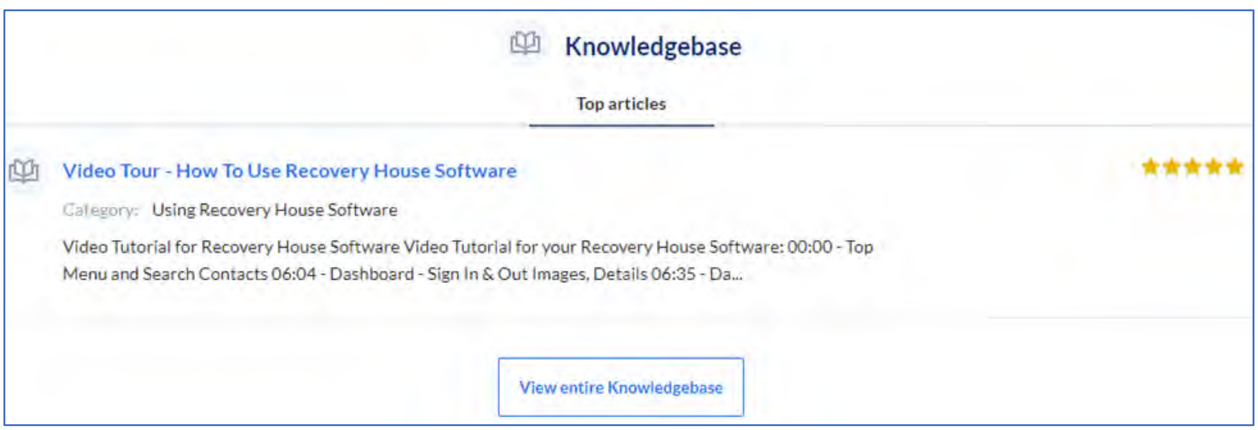






You can look up current or past Tickets. If you forget the tracking number, you can simply send your email address and it will send your Tracking ID.

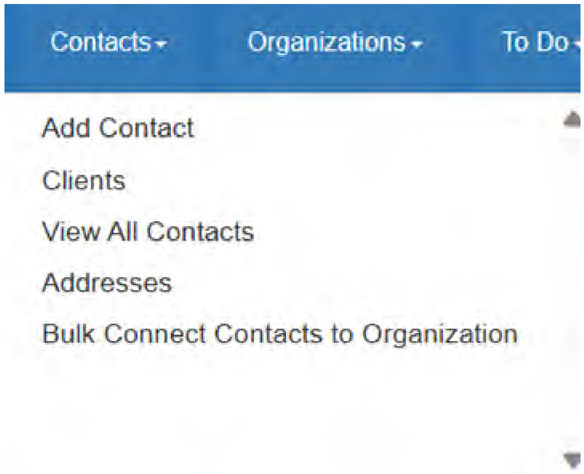
Knowledgebase

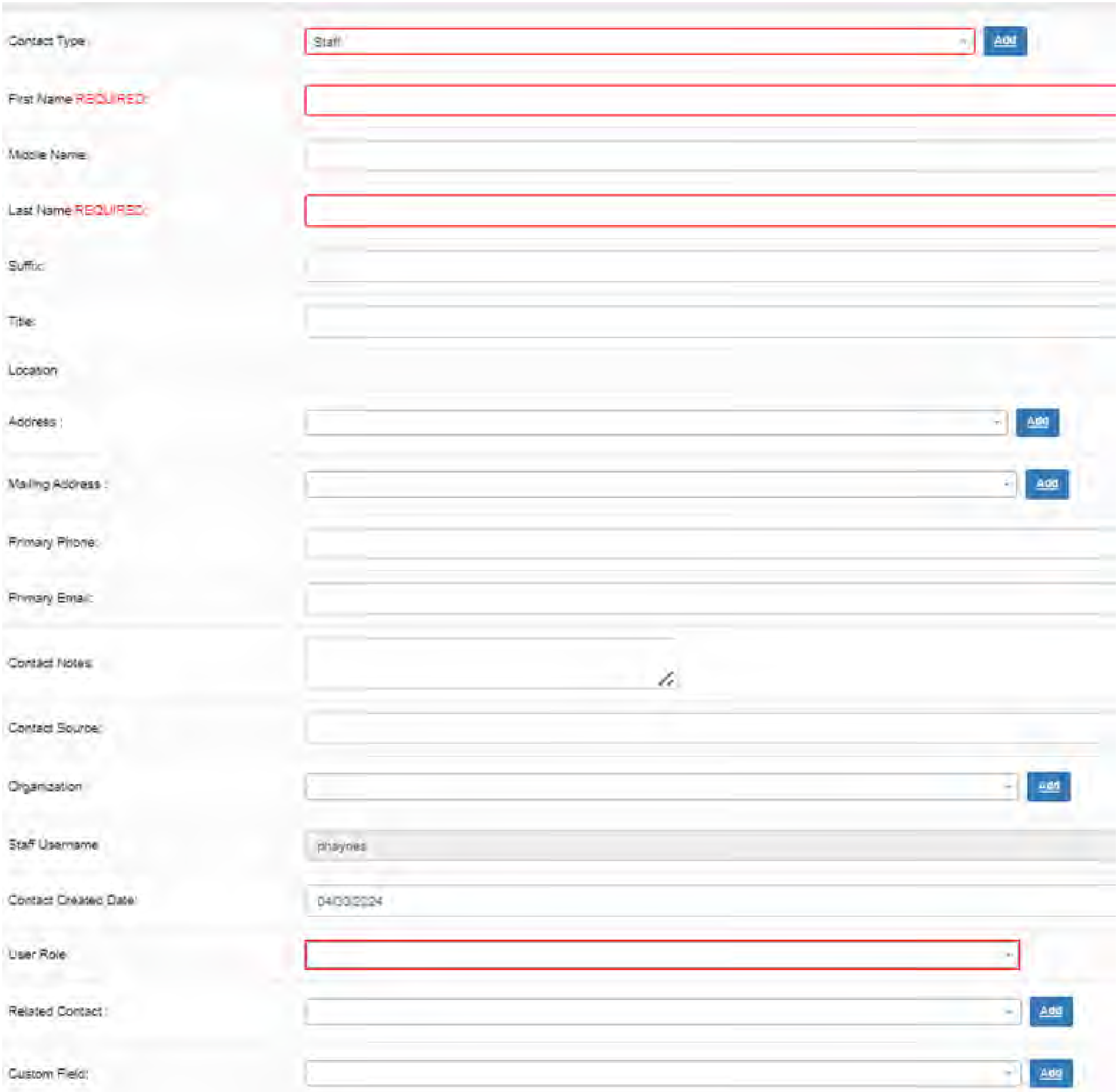


You can watch videos and articles about how to use the software.

CONTACTS

Add Contact





The only required fields are Contact Type, First Name and Last Name (except for Staff, which requires Role).

Then you can Addresses, Organizations and Related Contacts from this form by clicking the Add button, which brings up a pop-up form.

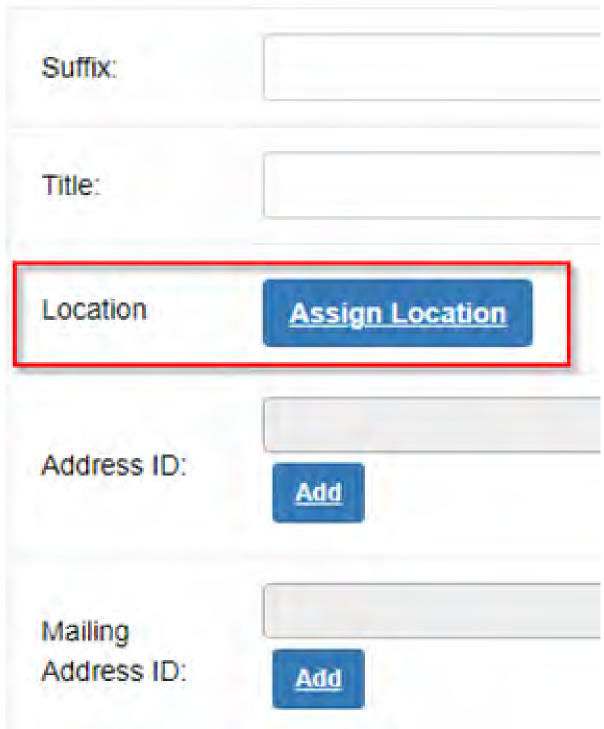
After you enter the new information and close out the pop-up form, select the new information from the drop-down box and press Submit.

If the Contact Type is Staff, you will need to select a Role for the Staff.

The Custom field is used in Metrics Reporting, such as if they are on Loan or Scholarship – whatever you want to track.

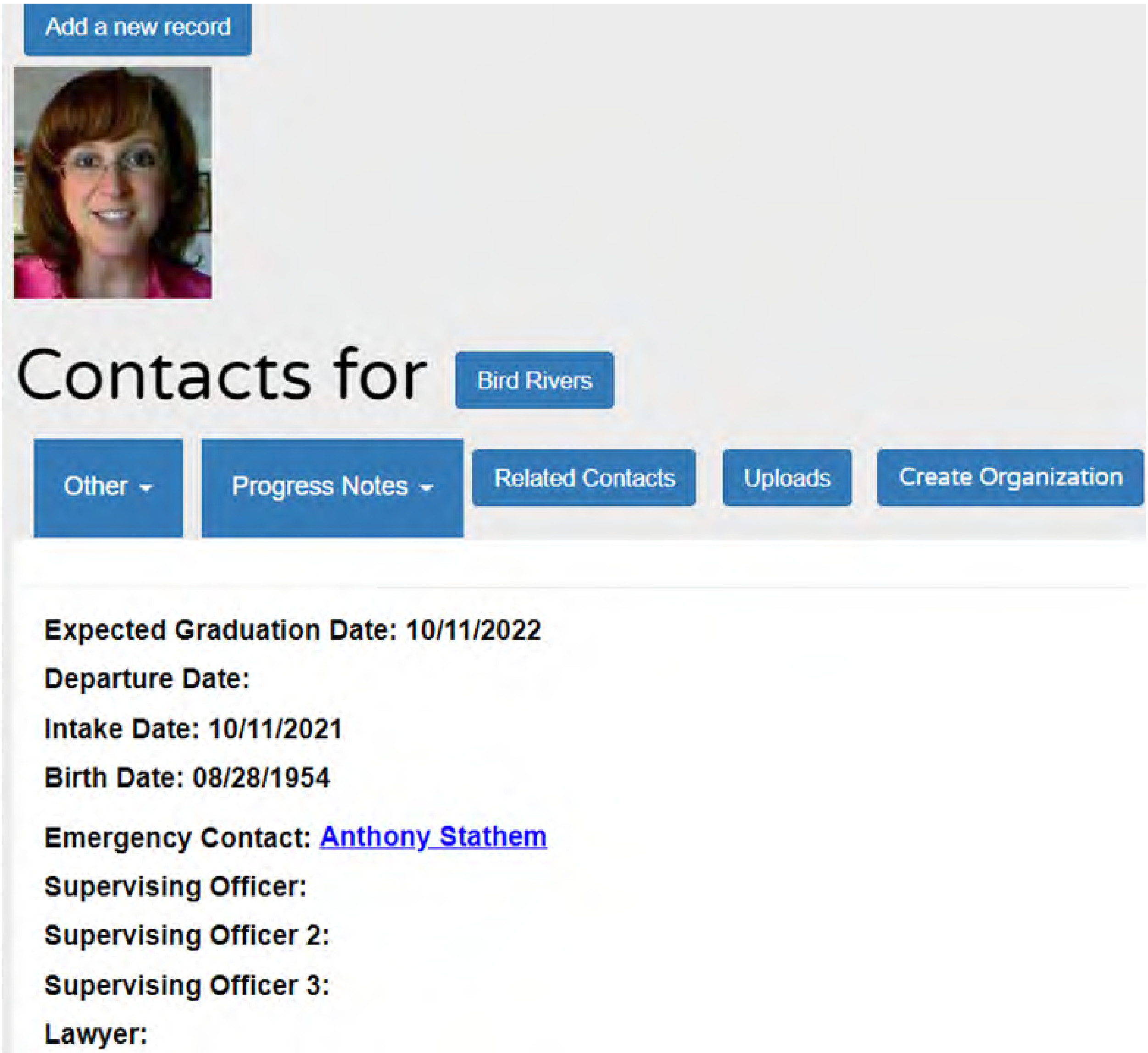
Press Submit. THEN assign a Location for Staff and Clients.

Assign Location



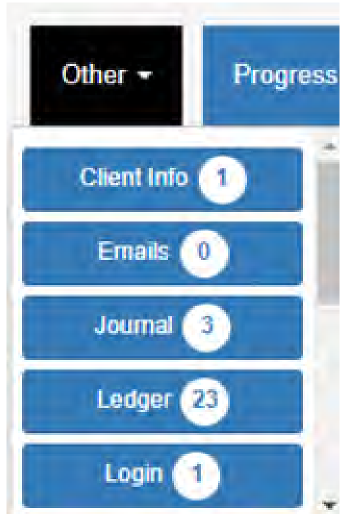
If you have not assigned a Location for the Contact, you can click the Assign Location button to do so.

Contact Page



This Client page allows you to see important information at a glance.

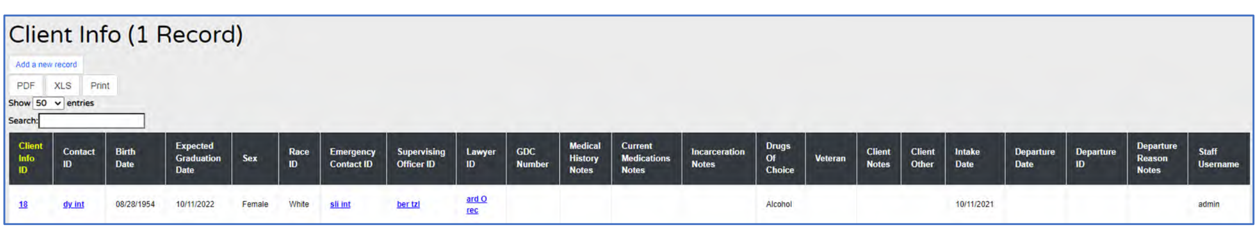
Contact Page Other



Client Info

If the Contact is Client, Client Prospect or Transitional Contact, and you have not completed the Client Info, you will see this red button reminding you to complete the Client Info. Or you can go to Other -> Client Info.

If a client leaves the program and returns, you can create a 2nd Client Info page, which will supersede the older Client Info, but not delete it. The other parts of the program will look for the latest Client Info information, such as new Intake Date, Graduation Date, etc.



Client Info (1 Record)

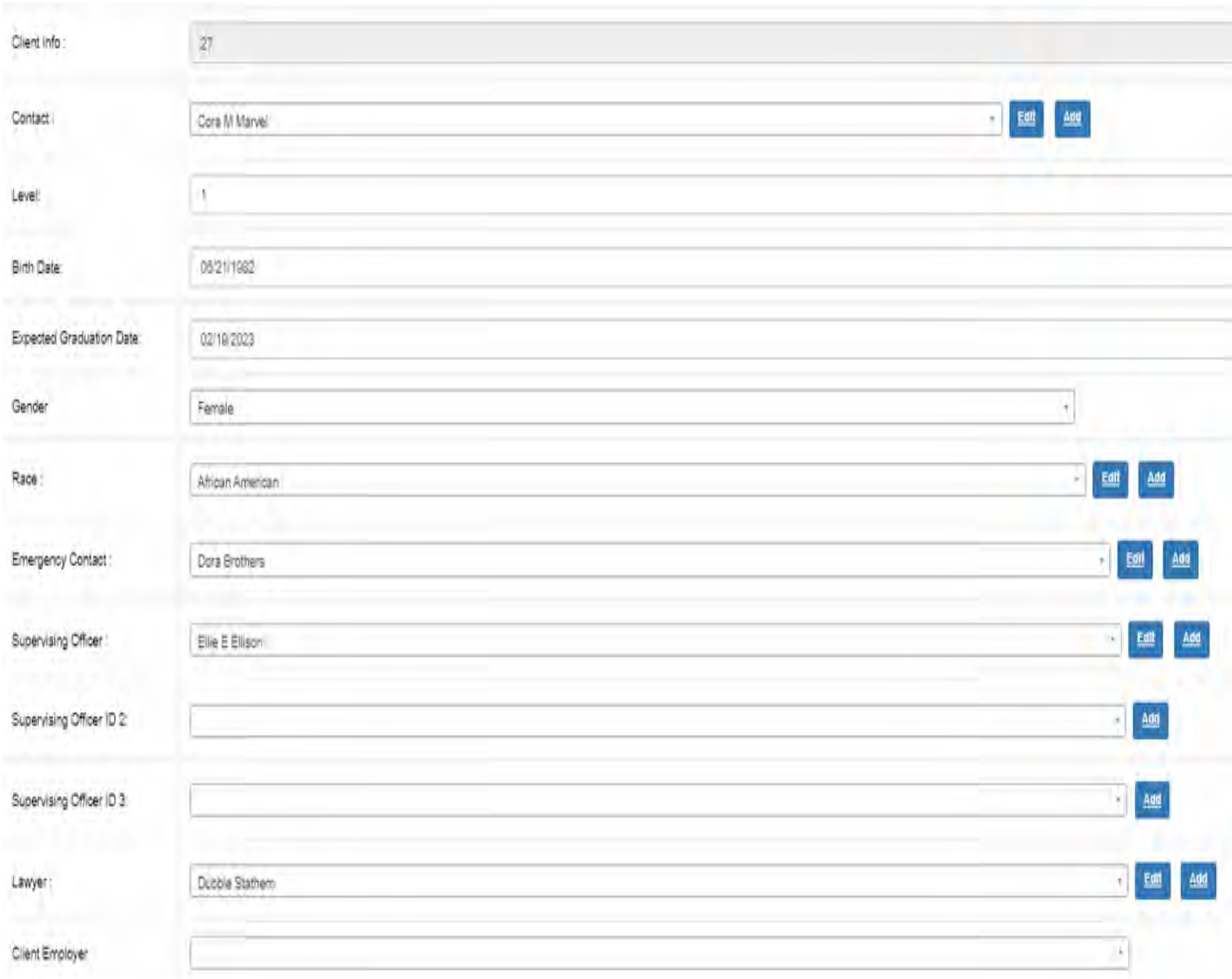
Add a new record

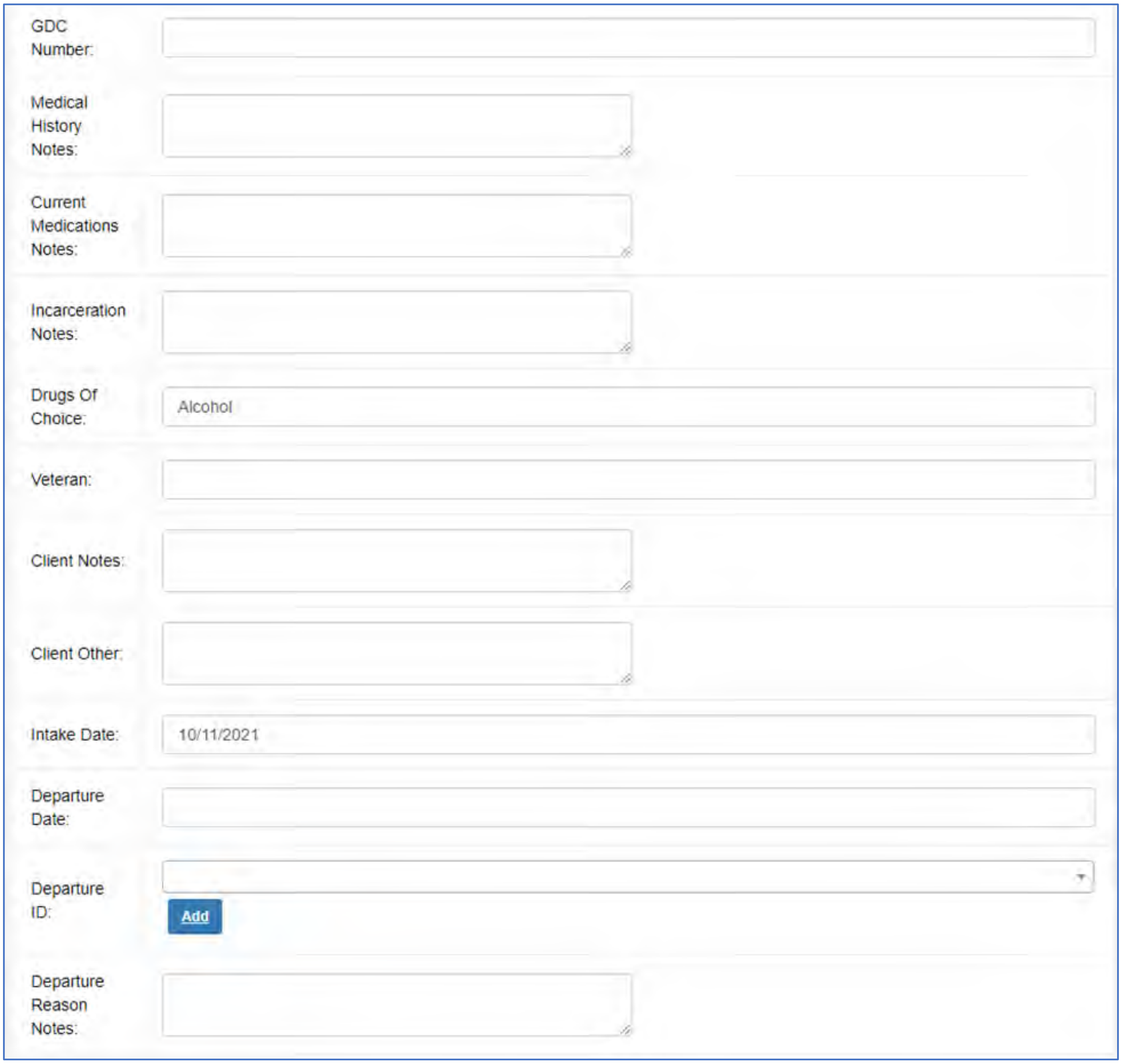
PDF XLS Print

Show 50 entries

Search:

Client Info ID	Contact ID	Birth Date	Expected Graduation Date	Sex	Race ID	Emergency Contact ID	Supervising Officer ID	Lawyer ID	GDC Number	Medical History Notes	Current Medications Notes	Incarceration Notes	Drugs Of Choice	Veteran	Client Notes	Client Other	Intake Date	Departure Date	Departure ID	Departure Reason Notes	Staff Username
18	dy int	08/28/1954	10/11/2022	Female	White	sli int	ber tzl	ard O rec					Alcohol				10/11/2021				admin


Client Info :
27
Contact :
Cora M Marvel
Edit
Add
Level:
1
Birth Date:
06/21/1982
Expected Graduation Date:
02/19/2023
Gender
Female
Race :
African American
Edit
Add
Emergency Contact :
Dora Brothers
Edit
Add
Supervising Officer :
Ellie E Ellison
Edit
Add
Supervising Officer ID 2:
Add
Supervising Officer ID 3:
Add
Lawyer :
Dubble Stathem
Edit
Add
Client Employer

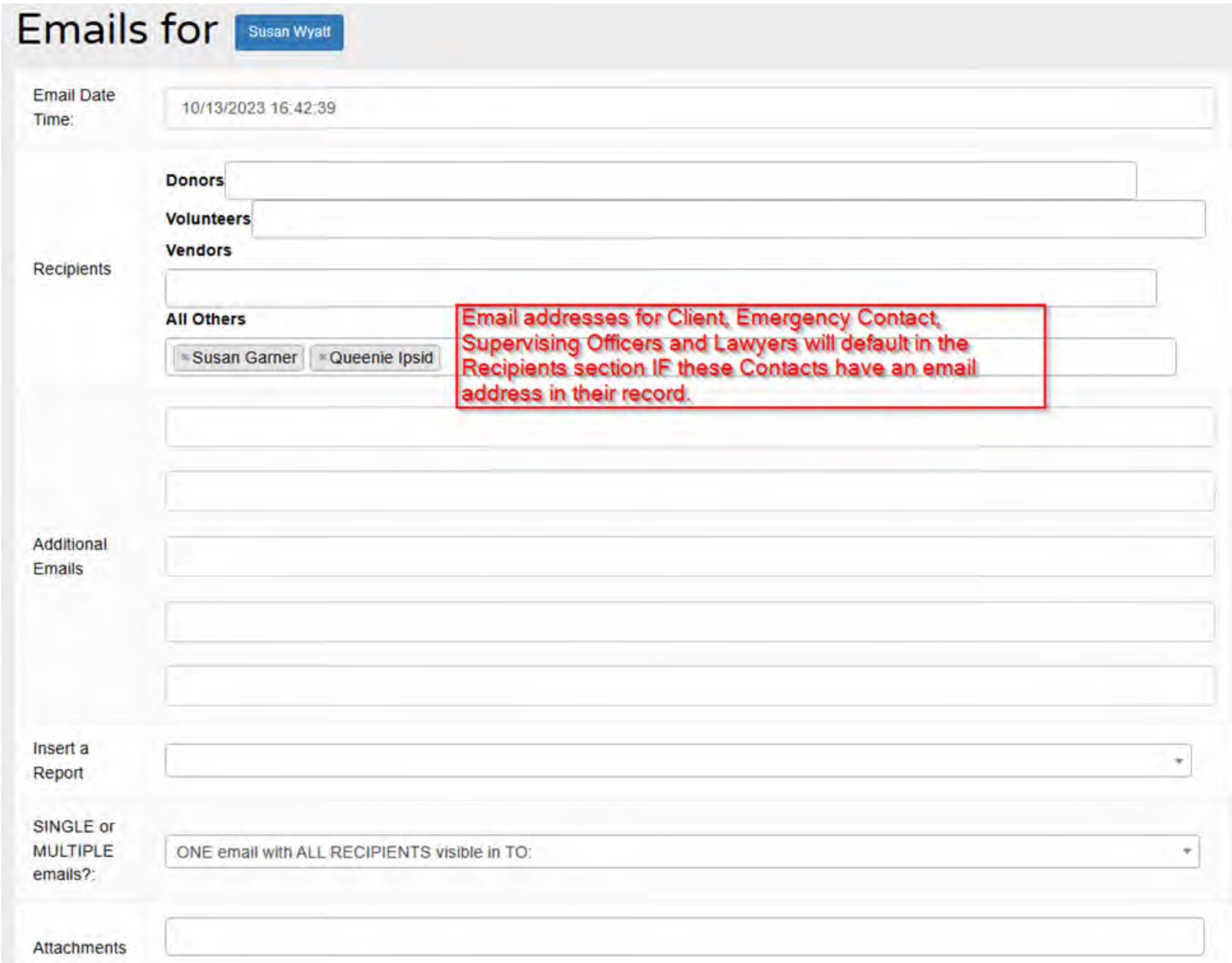


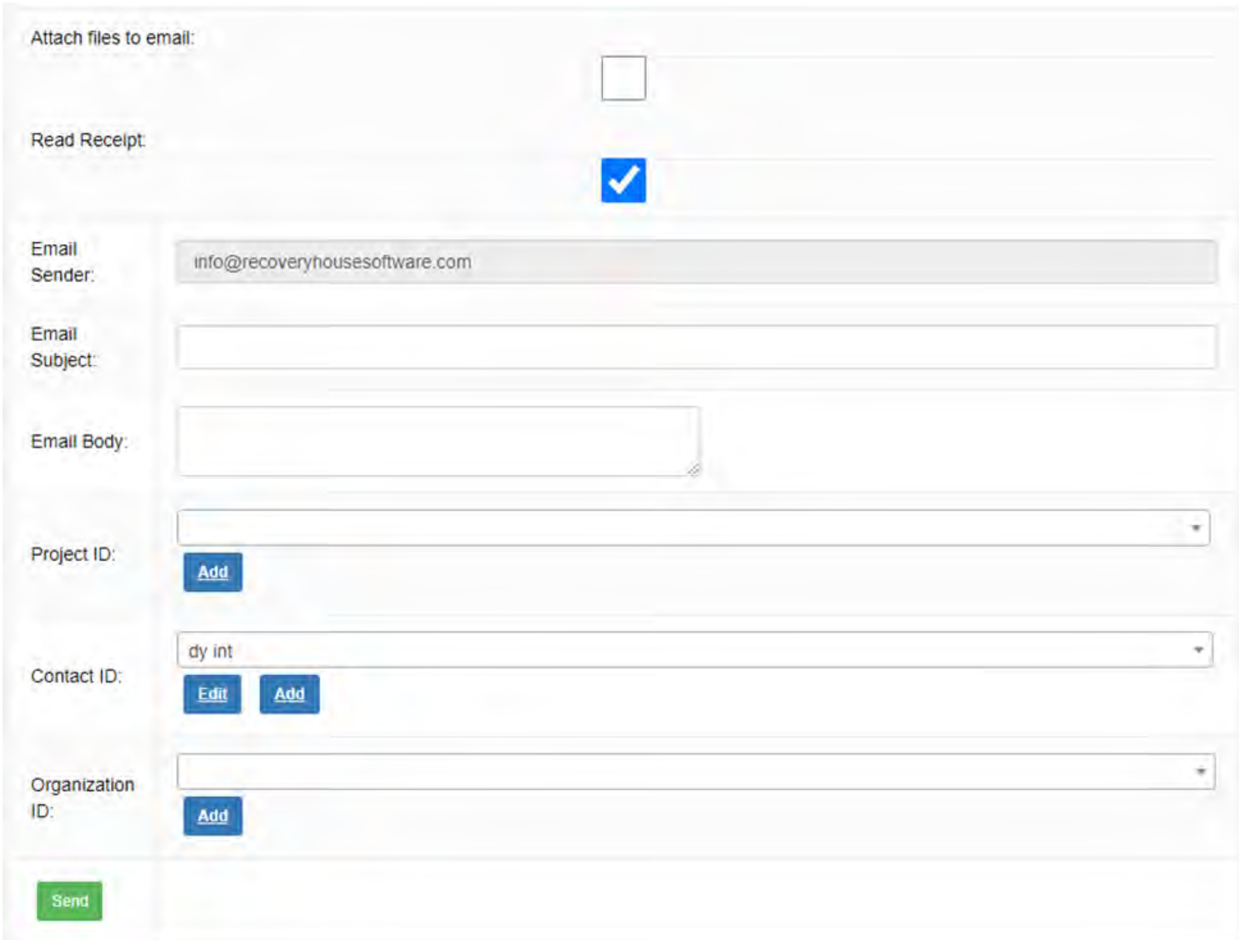
This information can be used for storing Demographics. The minimum information needed is the Date of Birth. This form is required for other functions to be activated (Treatment Plan, Date of Birth on Reports, etc.)

However, once a Contact becomes a Client or Past Client, this demographic information is used in our Metrics reporting. Reported fields are:

Intake Date, Departure Date, Departure ID (Type), Gender, Race, Veteran (if any information is entered into this field, this Contact is considered to be a Veteran).

Emails


Emails for
Susan Wyatt
Email Date Time:
10/13/2023 16:42:39
Recipients
Donors
Volunteers
Vendors
All Others
Susan Garner
Queenie Ipsid
Email addresses for Client, Emergency Contact, Supervising Officers and Lawyers will default in the Recipients section IF these Contacts have an email address in their record.
Additional Emails
Insert a Report
SINGLE or MULTIPLE emails?:
ONE email with ALL RECIPIENTS visible in TO:
Attachments



Emails are automatically CC'd to your Organization's mail email designated in the Admin Dashboard.

Contacts with email addresses are stored under Donors, Volunteers, Vendors and All Others.

If the Client, Emergency Contact, Supervising Officers or Lawyer selected in this Client's Client Info page have an email address, they will show up as default recipients on each newly created email. You can click the X next to their name to remove them from this correspondence.

You can also add email addresses on the fly in the Additional Emails section.

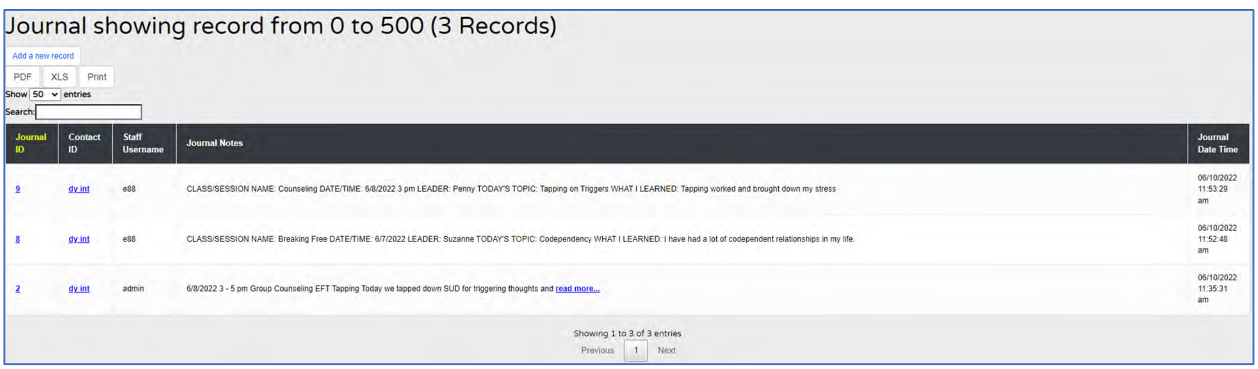
You can insert a report into the body of an Email and/or as an attachment (as a link to download the attachment, or with the file attached to the email).

You can determine if you want to send the emails to multiple recipients individually, all together with email addresses seen by all recipients, or by using your Administrative Email in the TO section, and putting everyone's email address in the BCC section.

You can attach emails to Contacts, Organizations and Projects.

After you press Submit, but before the email is sent, you will have a chance to review the recipients, the reports, and the attachments to give you a chance to review what you are sending and that you haven't selected a wrong recipient by mistake.

Journal



Journal showing record from 0 to 500 (3 Records)

Add a new record

PDF XLS Print

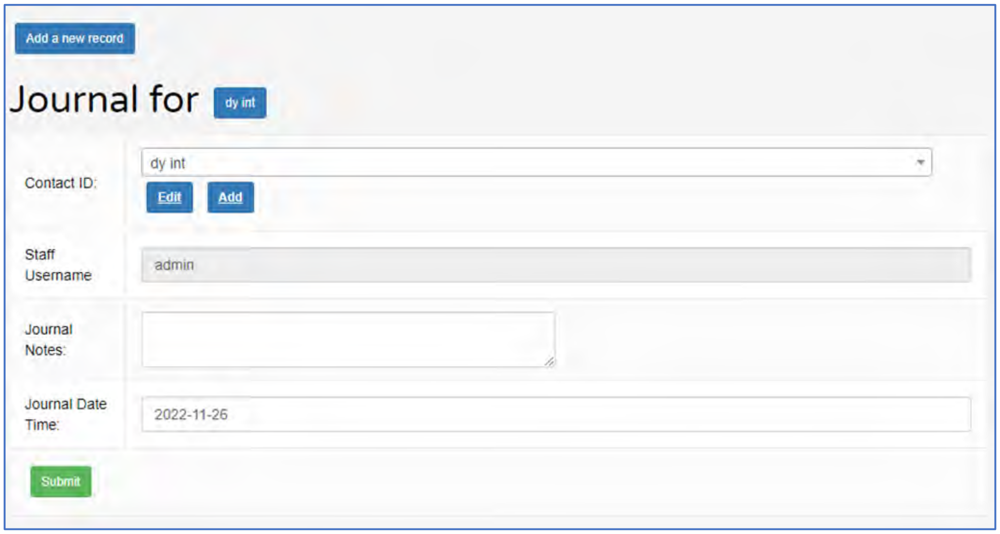
Show 50 entries

Search:

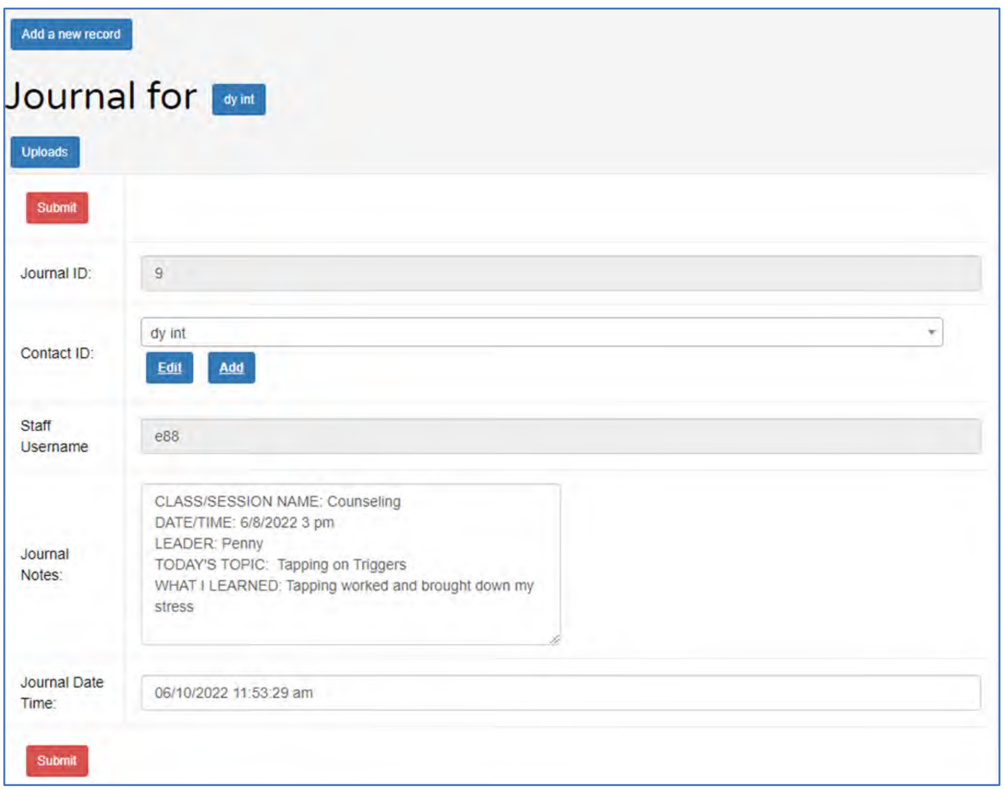
Journal ID	Contact ID	Staff Username	Journal Notes	Journal Date Time
9	dy int	e88	CLASS/SESSION NAME: Counseling DATE/TIME: 6/8/2022 3 pm LEADER: Penny TODAY'S TOPIC: Tapping on Triggers WHAT I LEARNED: Tapping worked and brought down my stress	06/10/2022 11:53:29 am
8	dy int	e88	CLASS/SESSION NAME: Breaking Free DATE/TIME: 6/7/2022 LEADER: Suzanne TODAY'S TOPIC: Codependency WHAT I LEARNED: I have had a lot of codependent relationships in my life.	06/10/2022 11:52:48 am
2	dy int	admin	6/8/2022 3 - 5 pm Group Counseling EFT Tapping Today we tapped down SUD for triggering thoughts and read more...	06/10/2022 11:35:31 am

Showing 1 to 3 of 3 entries

Previous 1 Next

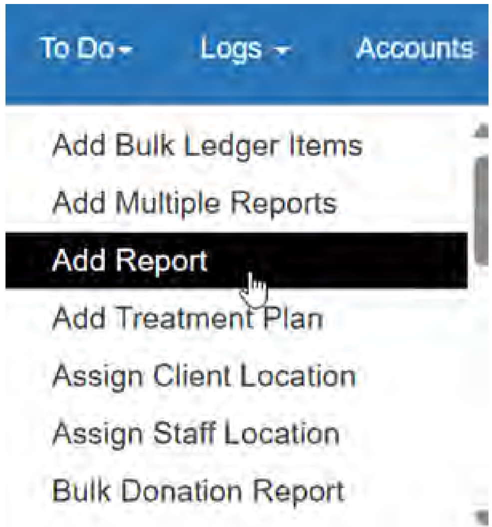


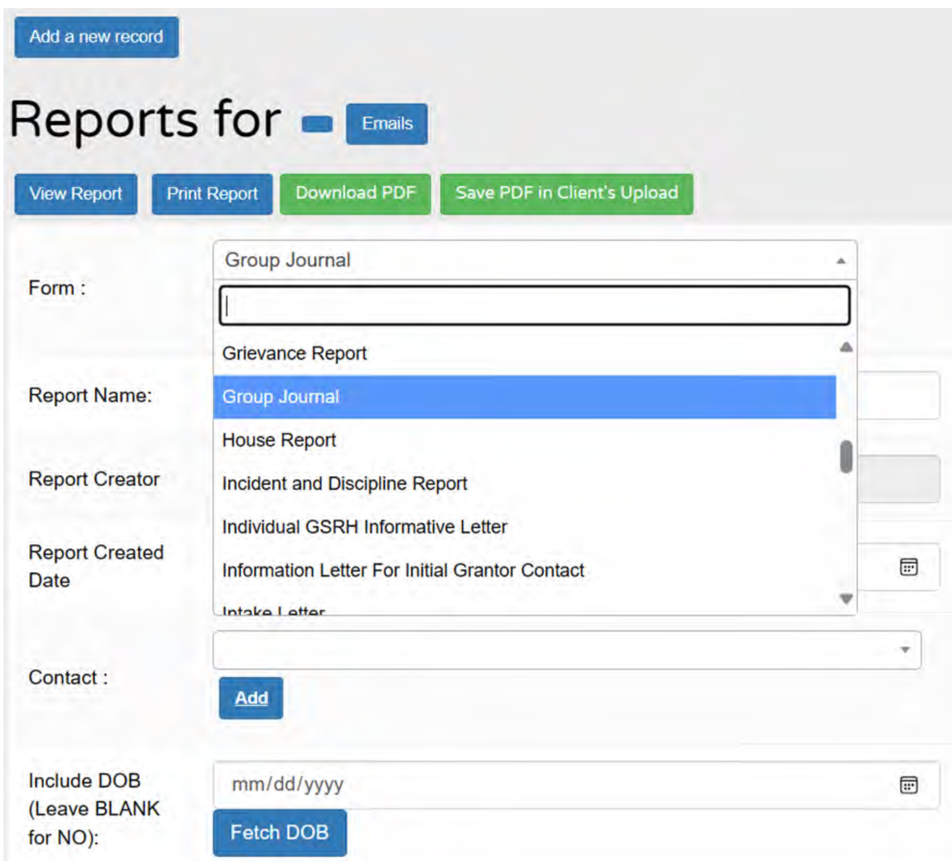
If Staff create a Journal Entry, it defaults to an empty Journal Notes box.

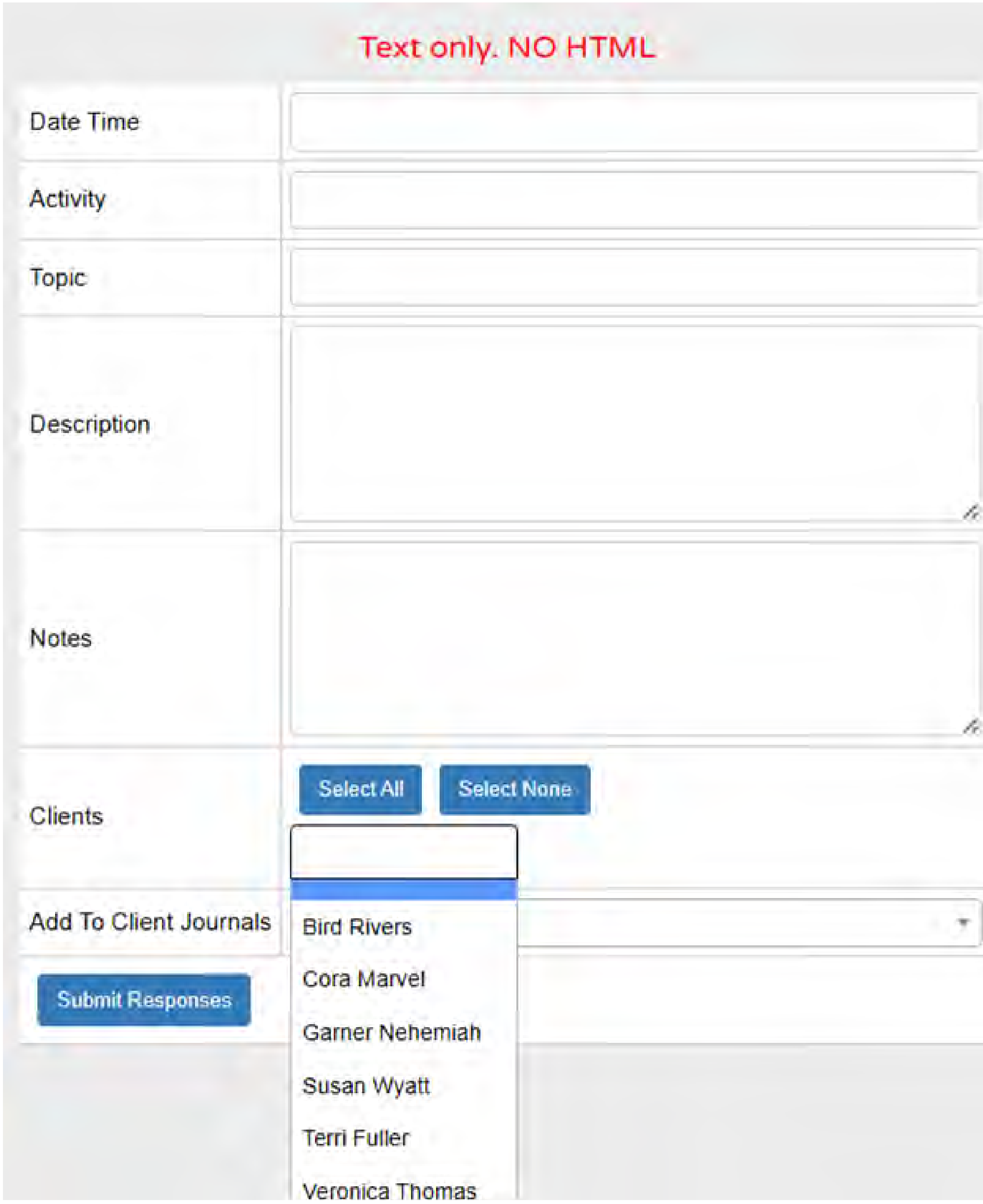


If a Client creates a journal, it defaults to a template that asks them to detail an activity. The Journal is a feature intended for Clients to document their completed activities.

Group Journal







There is also a built in Report called Group Journal that allows Staff to document a class and copy the Report notes to multiple Client journals at one time (Staff journal entries are NOT seen by Clients).

You select Group Journal and rename the Report whatever you want. You do not have to select a Contact or any other information on the initial part of the form.

After you press Submit, the 2nd part of the form appears and you can fill in your notes from class (we encourage you to not mention clients by name due to HIPAA regulations, and if you are asked to print out a Client's journal entries by an Authority, it will have other people's identifying information in the Journal).

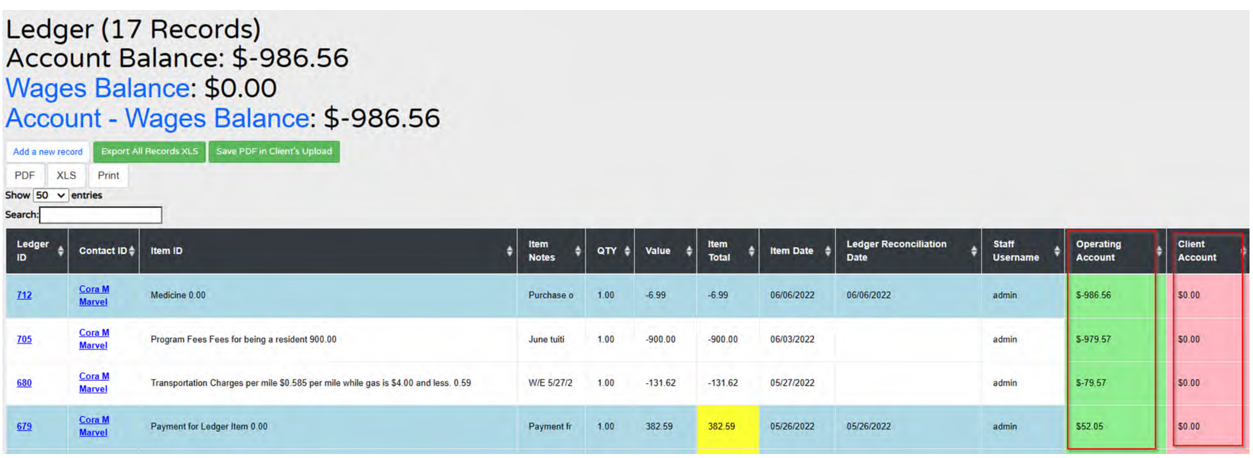
Then select which Clients attended the class.

Not until you select Yes for Add To Client Journals and press Submit will it be saved as individual journals for each client, so you can press Submit and edit the form until you are ready to add it to the Clients' journals.

The Staff Journal entries could be used as informal Progress Notes for Clients. (There is a formal Treatment Plan Notes section based on DAP.)

Clients can create and view Journals they created on the Client Dashboard. This journal defaults to the above Template of Class, Date/Time, Leader, Topic and Learned.

Ledger



Ledger (17 Records)
Account Balance: $-986.56
Wages Balance: $0.00
Account - Wages Balance: $-986.56

Add a new record | Export All Records XLS | Save PDF in Client's Upload
PDF | XLS | Print
Show 50 entries
Search:

Ledger ID	Contact ID	Item ID	Item Notes	QTY	Value	Item Total	Item Date	Ledger Reconciliation Date	Staff Username	Operating Account	Client Account
712	Cora M Marvel	Medicine 0.00	Purchase o	1.00	-6.99	-6.99	06/06/2022	06/06/2022	admin	$-986.56	$0.00
705	Cora M Marvel	Program Fees Fees for being a resident 900.00	June tuiti	1.00	-900.00	-900.00	06/03/2022		admin	$-979.57	$0.00
680	Cora M Marvel	Transportation Charges per mile $0.585 per mile while gas is $4.00 and less. 0.59	W/E 5/27/2	1.00	-131.62	-131.62	05/27/2022		admin	$-79.57	$0.00
679	Cora M Marvel	Payment for Ledger Item 0.00	Payment fr	1.00	382.59	382.59	05/26/2022	05/26/2022	admin	$52.05	$0.00

The Ledger performs multiple functions. It allows your Organization to assign charges and payments toward what the Client owes. It can also be used as an actual Client Bank Account Ledger tracking money deposits and withdrawals that can be used for Reconciling the Client Bank Statement every month.

The top of the page shows Balances three ways:

1) The Account Balance, which shows you how much money is owed to your Operating Account without any Wages applied.
2) Wages Balance (Client Acct), which shows you how much money the client has in the Client Bank Account.
3) Account - Wages Balance, which is the Client Balance + Client Wages (in other words, it is the amount that would be owed if you applied the money in the Client Bank Account toward their balance).

Yellow Highlights show Payments Received and applied toward the Client's Balance owed or money Deposited into their Client Bank Account.

Blue Highlights show Payments Received and applied toward the Client's Balance owed.

Red Font shows actual monies withdrawn or deposited into the Client Bank Account.

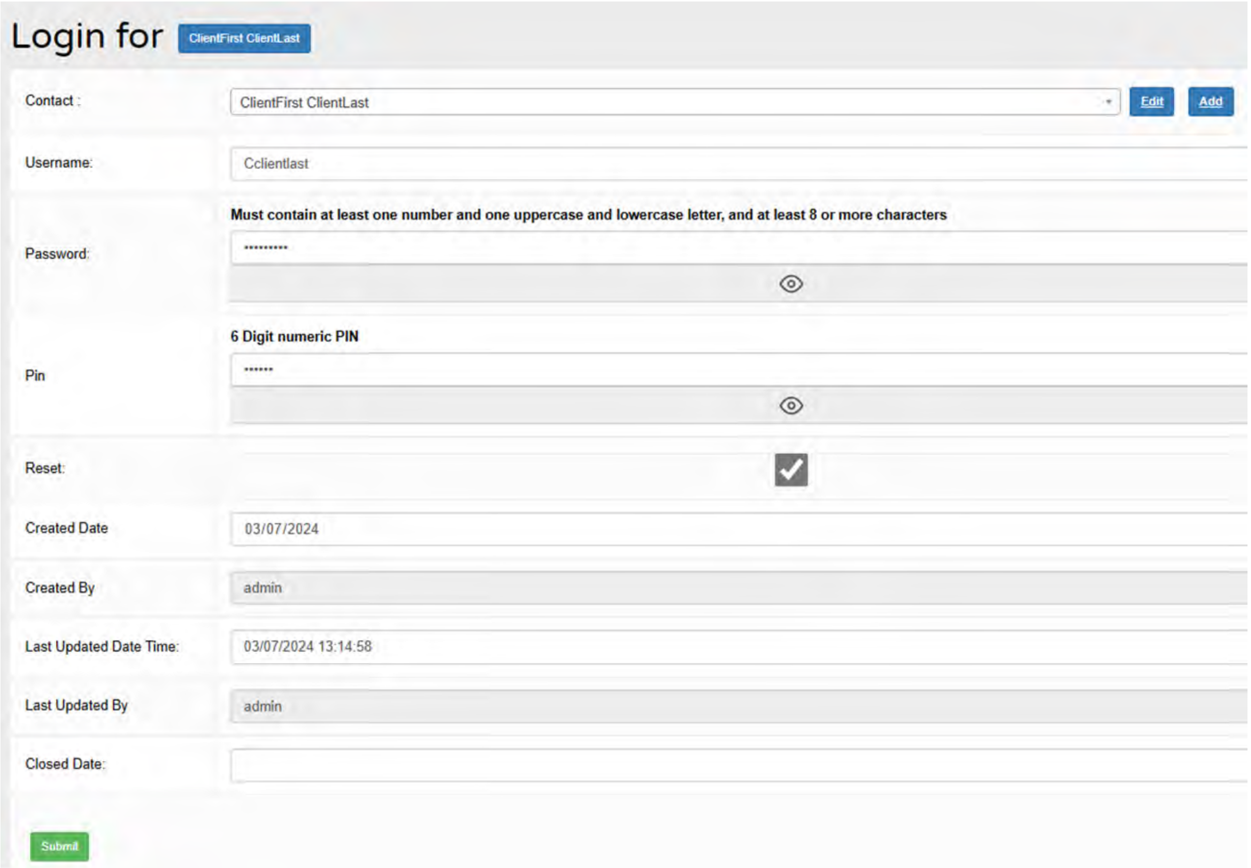
The Green Column is a running balance of the Client's Balance.

The Pink Column is a running balance of actual money in the Client Bank Account.

There is a **Save to PDF & Client's Uploads** button that will save a current copy of the Ledger to the Client's Uploads, so it can be sent via email as an attachment if necessary.

The Client Dashboard has a different version of the form that also allows the Client to print out their withdrawal and deposit sheets so they can document giving it to Staff to document the withdrawals and deposits for the Bank.

Login



The above picture shows what the form looks like when you open it for the first time to create a new login and password for a Contact.

This is the Username, Login, Password and PIN assignment page for Staff and Clients.

A default Username is created based on First Initial, Middle Initial and Last Name, Password and PIN. If that is already taken, it will append the Client ID to the end of the Username.

If you want the User to create their own Password and PIN, then check the Reset Box.

When first opening this form, it will default to:

Password: Test1234!

PIN: 000000

RESET: Yes (Checked)

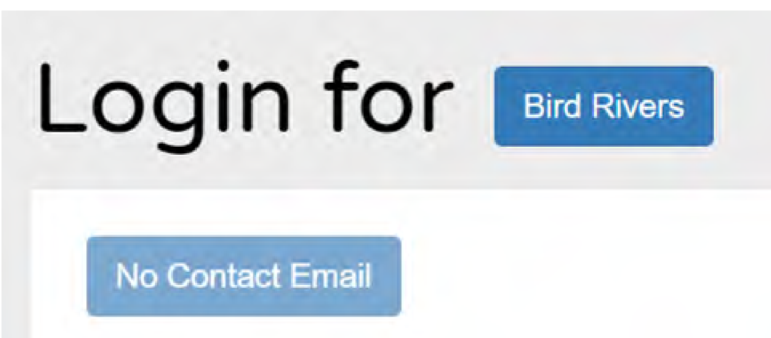
So if you are only setting a temporary Password or PIN, you can simply open the form and press Submit.

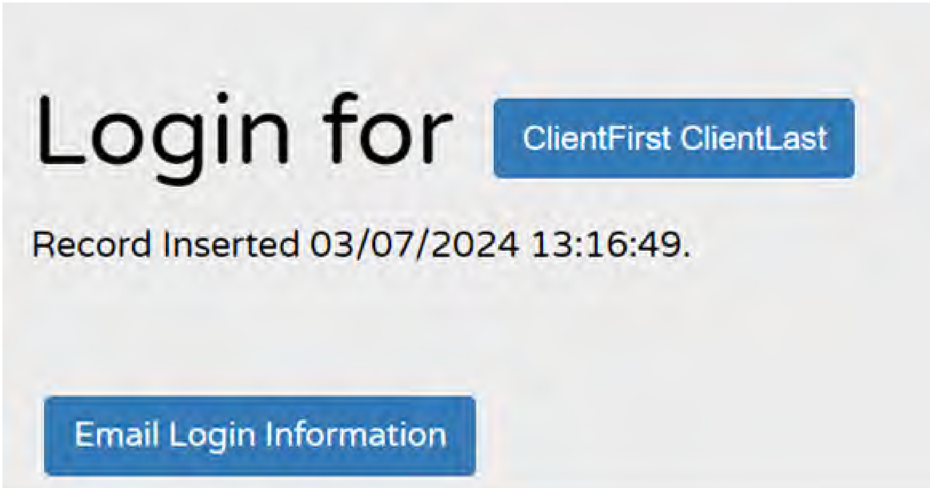
Give the Username, temporary Password and PIN to the User, and the Program will force them to create a new Password and PIN after their first successful login. Then the Program will force them to Log in again after they change their Password and PIN.

The Passwords are not accessible anywhere in the Program or the back end tables. If a User forgets their Password, you will have to reset it with a Temporary Password, provide that information to them, and let them choose a new Password and PIN.

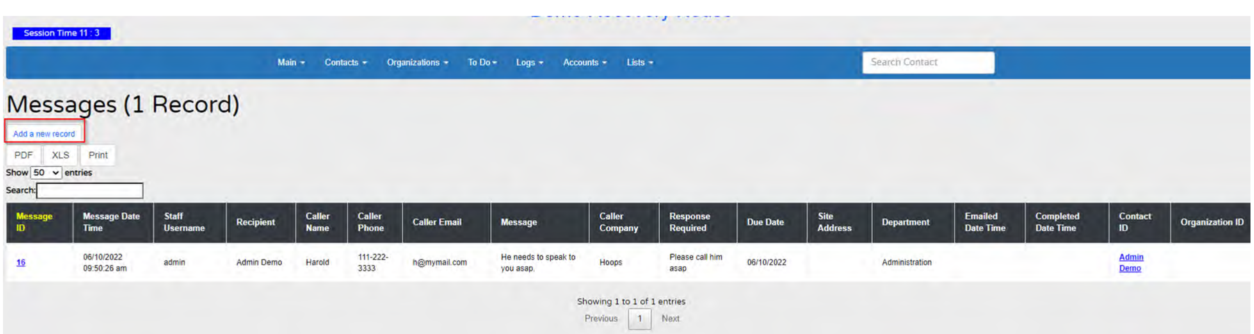
If they forget their PIN, there is an option to have the PIN emailed to their email address on file.

After you press submit, you will see a button that will either tell you that the Contact does not have an email, or it will let you email the Temporary login information to the Contact.



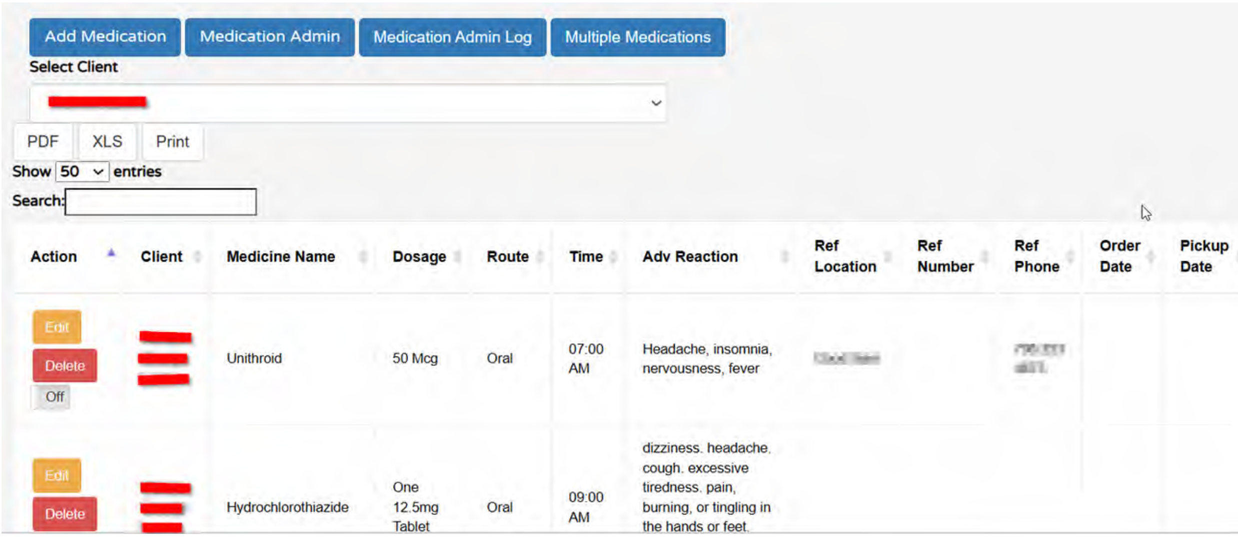


Messages



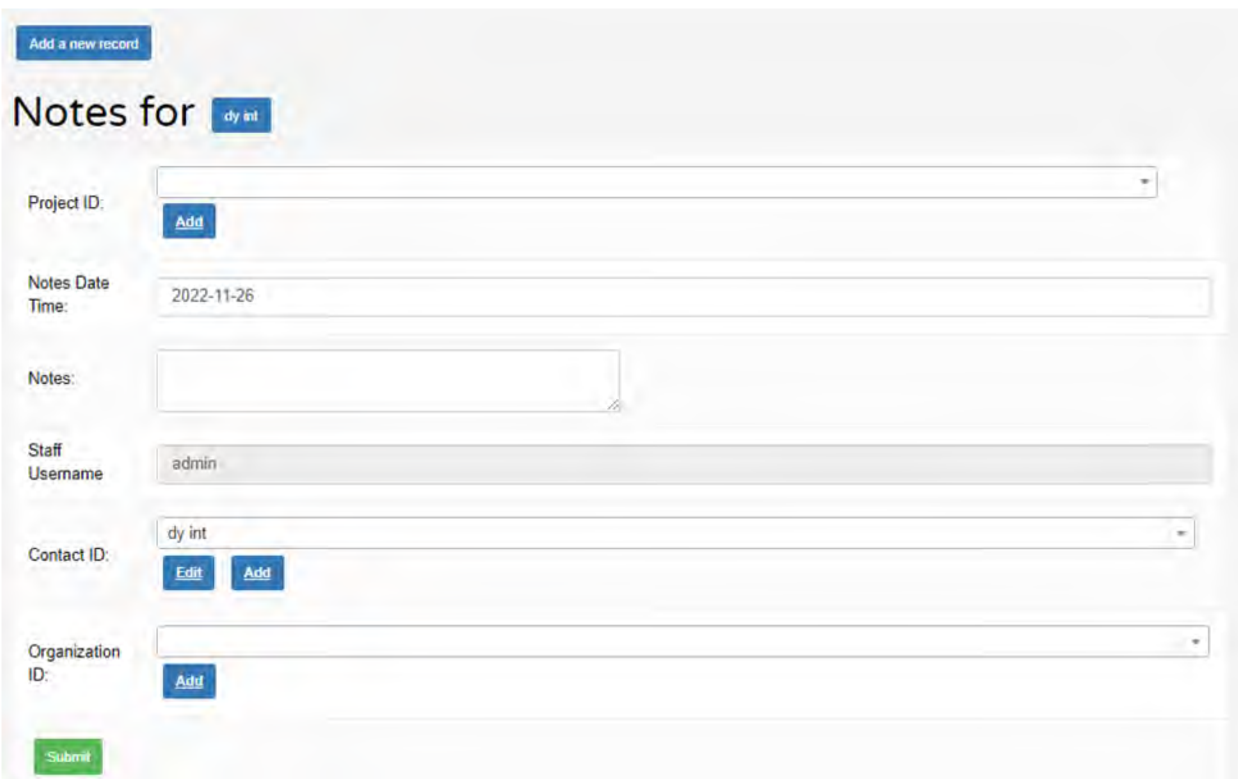
Messages can only be sent to Staff, so this option is only useful if you want to see what Messages have been sent to a Staff member, or add a Message to Staff.

Medication



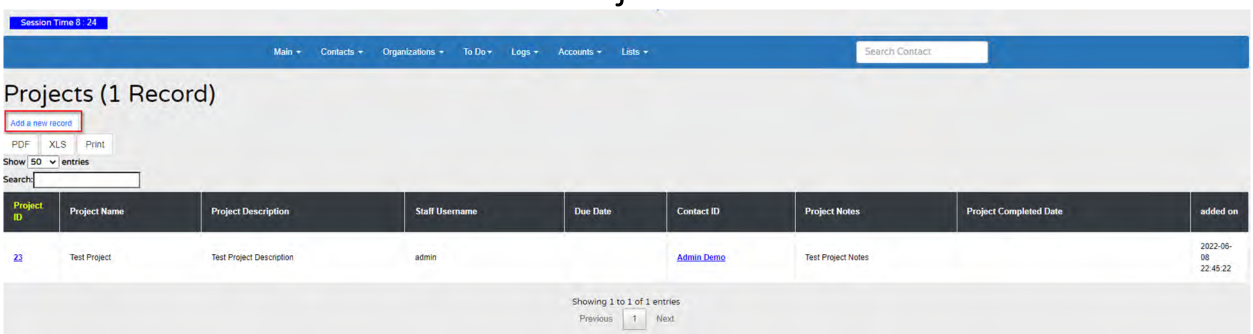
View medications and medication administration for this client.

Notes



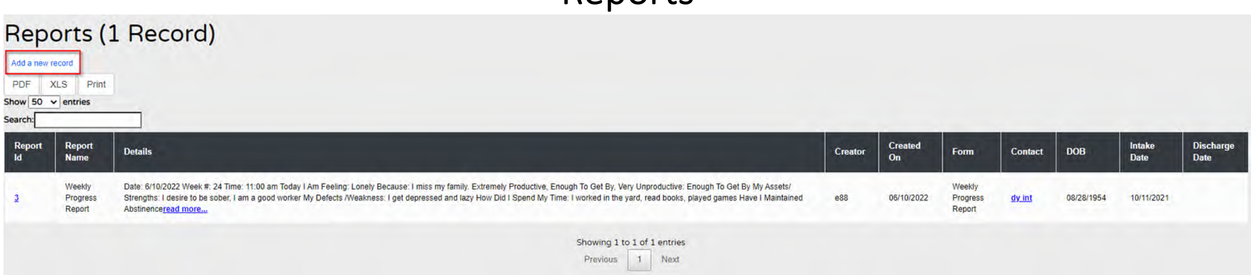
This section is another storage area for information. You can use it to store incoming emails from Probation Officers regarding clients, Notes on incoming Clients for whom no Treatment Plan has yet been created, etc.

Projects



Both Clients and Staff can be assigned Projects. You can view them or add a Project.

Reports



View all Reports created by Staff and Clients for this Contact and add a new Report.

Tasks

Tasks (2 Records)

Add a new record

PDF XLS Print

Show 50 entries

Search:

Task ID	Project ID	Task Name	Task Description	Staff Username	Due Date	Due Time	Contact ID	Task Notes	Task Completed Date	added on
8		CARES Community Service	Help at CARES	y521	06/14/2022	08:30:00	res B dle			2022-06-10 12:25:33
7		CARES Community Service	Help at CARES	y521	06/13/2022	08:30:00	res B dle			2022-06-10 12:25:33

Showing 1 to 2 of 2 entries

Previous 1 Next

View all Tasks created for this Contact and add a new Task.

Transactions

Transactions (4 Records)

Add a new record

PDF XLS Print

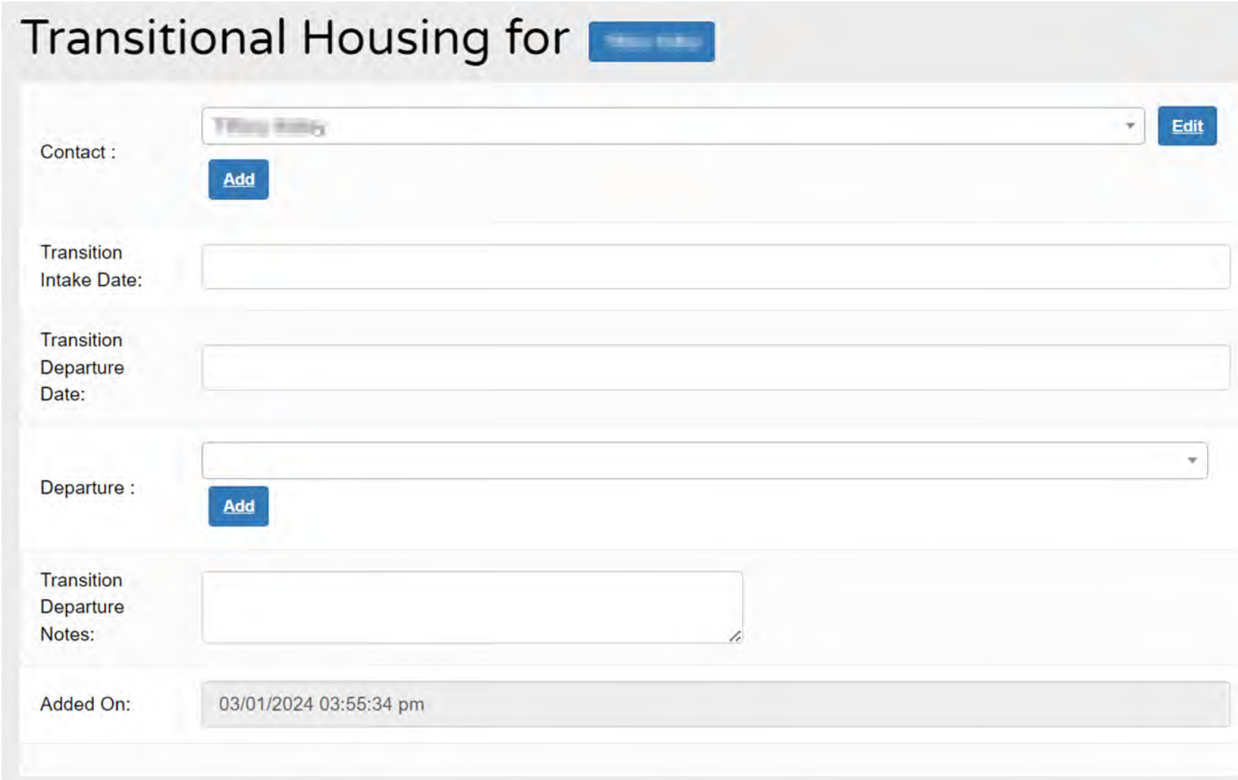
Show 50 entries

Search:

TR ID	TR Entry Type ID	Organization ID	Address ID	Payment Contact ID	TR Invoice Number	TR Sent Date	TR Amount	TR In Kind	TR Paid Date	TR Payment Type ID	TR Documentation Received ID	TR Documentation Stored ID	TR Notes	Contact ID	Ledger ID	Transaction Categories ID	TR Reconcilation Date	Staff Username	added on
2033	Payment	od Sa		nya dis		05/27/2022	-25.00	0.00	05/27/2022	Debit Card	Receipt			res B dle	688 521 8 Purchase o 1.00 -25.00 -25.00 2022-05-27 2022-06-01 admin	Other Types of Expenses: Paid for Client: Client Medical - Expenses		saddison	2022-06-01 18:43:48
2022	Payment	od Sa		nya dis		05/27/2022	-20.00	0.00	05/27/2022	Debit Card	Receipt			res B dle		Other Types of Expenses: Paid for Client: Client Medical - Expenses		saddison	2022-06-01 13:15:44
2021	Payment	od Sa		nya dis		05/27/2022	-20.00	0.00	05/27/2022	Debit Card	Receipt			res B dle	684 521 9 Purchase o 1.00 -20.00 -20.00 2022-05-27 2022-06-01 admin	Other Types of Expenses: Paid for Client: Client Medical - Expenses		saddison	2022-06-01 13:03:23
															670 521				

View all Operating Account Transactions related to this Contact and add a new Transaction.

Transitional Housing

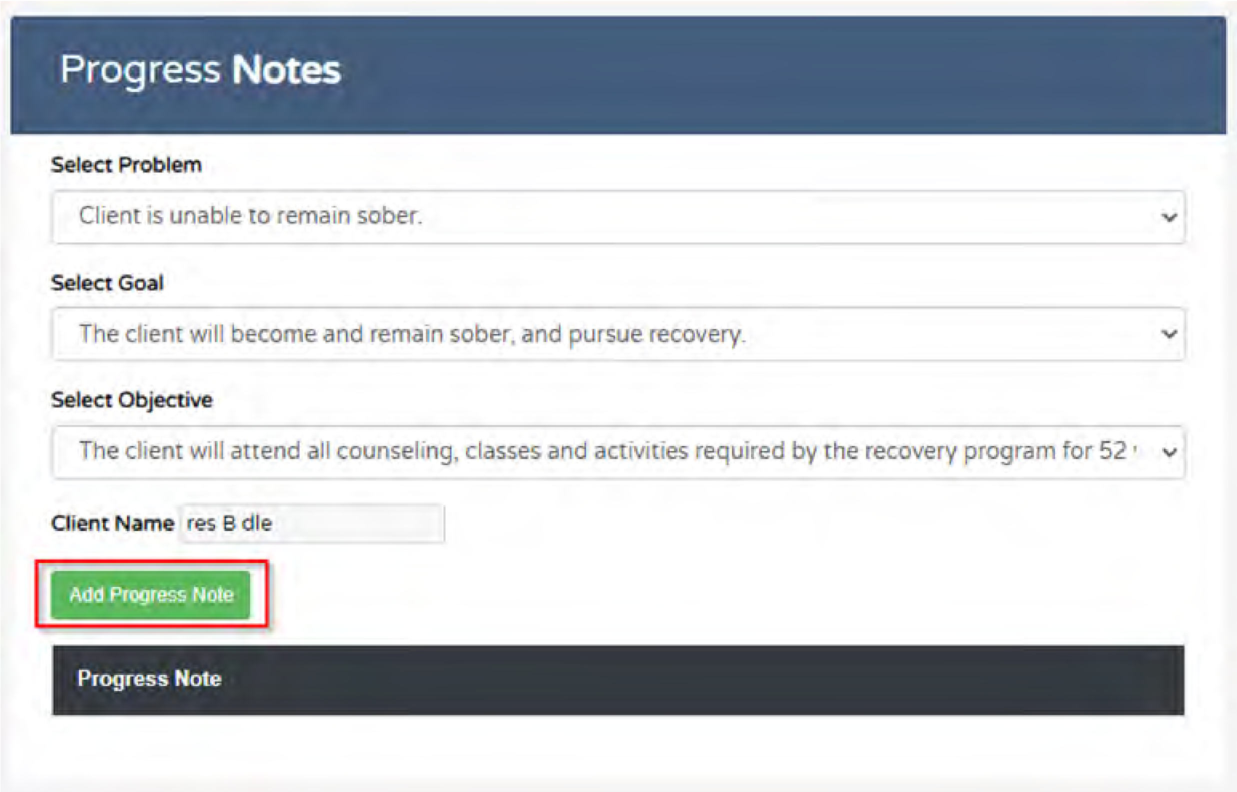


Once a client leaves the main program, you need to enter a Departure Date and Type of Departure for the Metrics Reporting to work accurately.

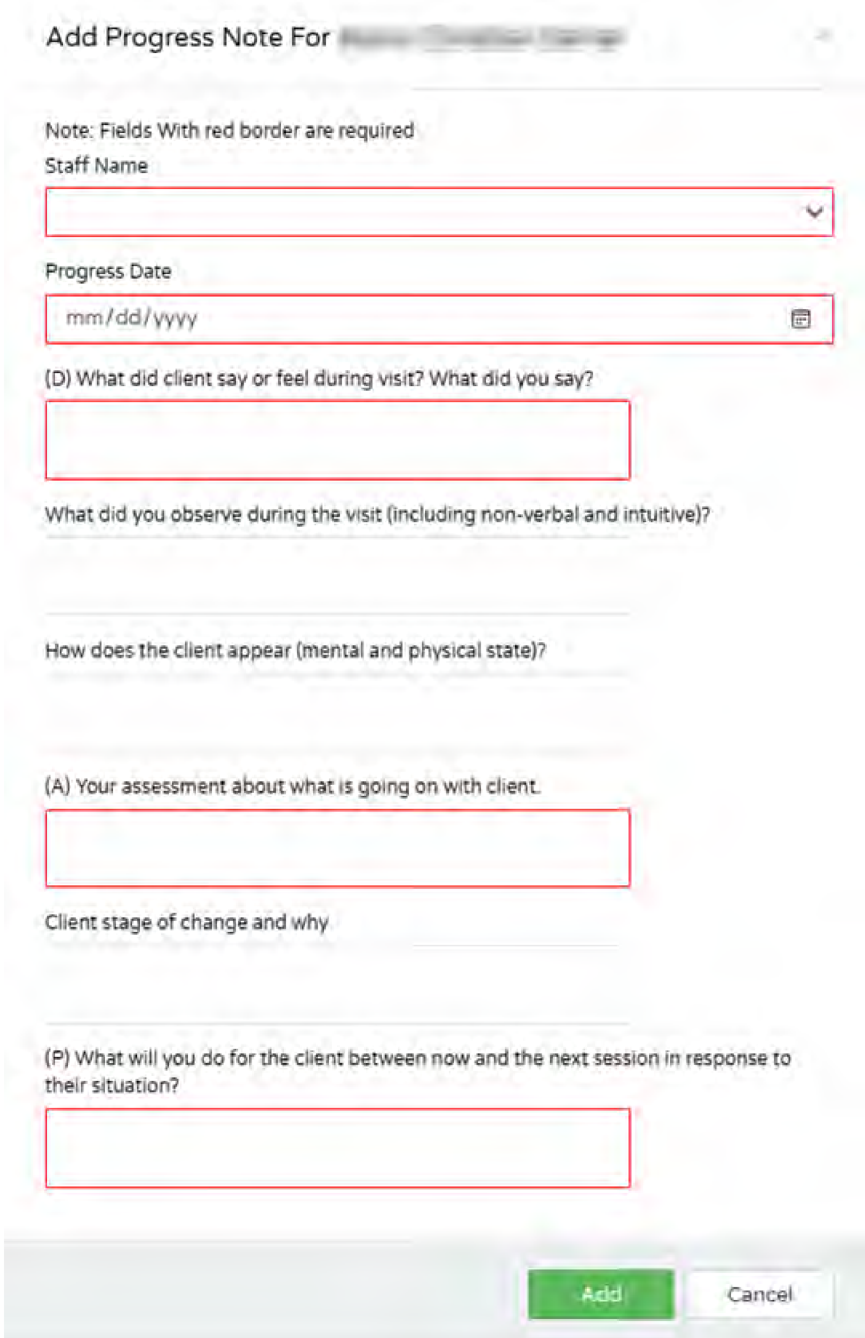
However, some clients may stay in a residence as a Transitional Client. This form allows you to also track demographics and statistics on how long Transitional Clients stay in Transitional Housing.

Contact Page Progress Notes

Add Progress Notes

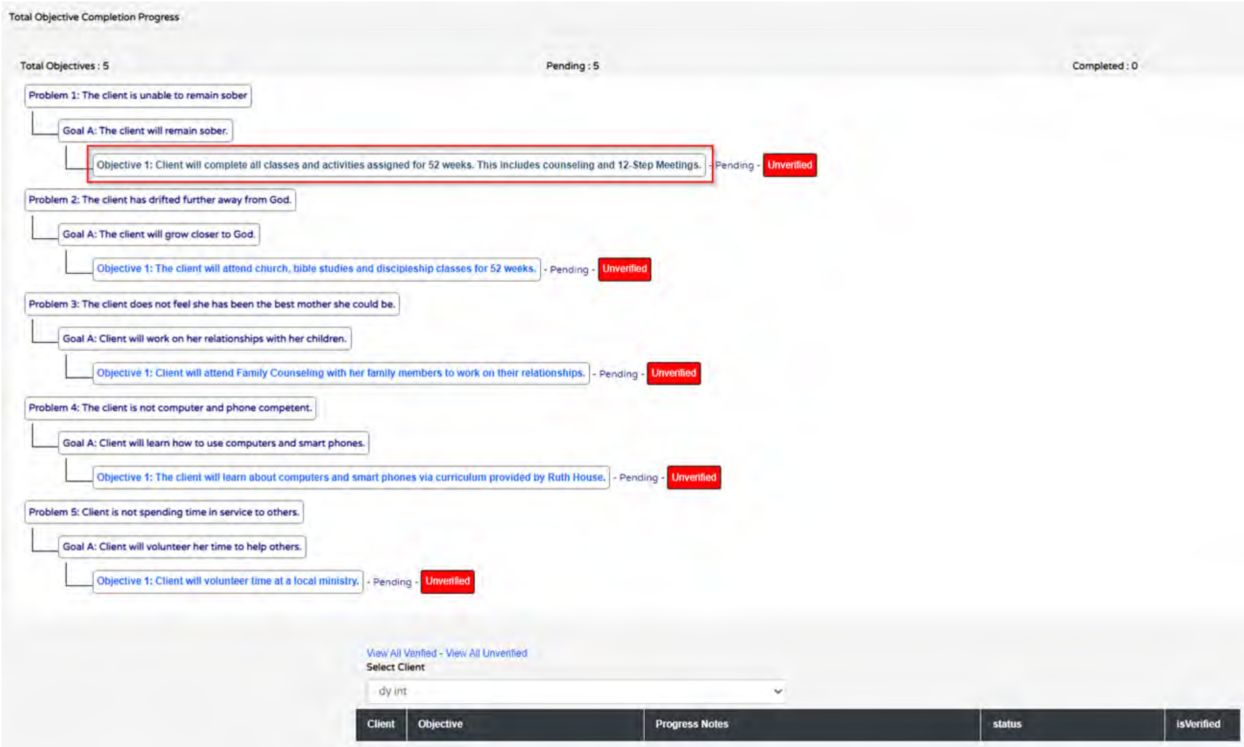


Select the Treatment Plan Problem, Goal and Objective for the Client and click Add Progress Note.

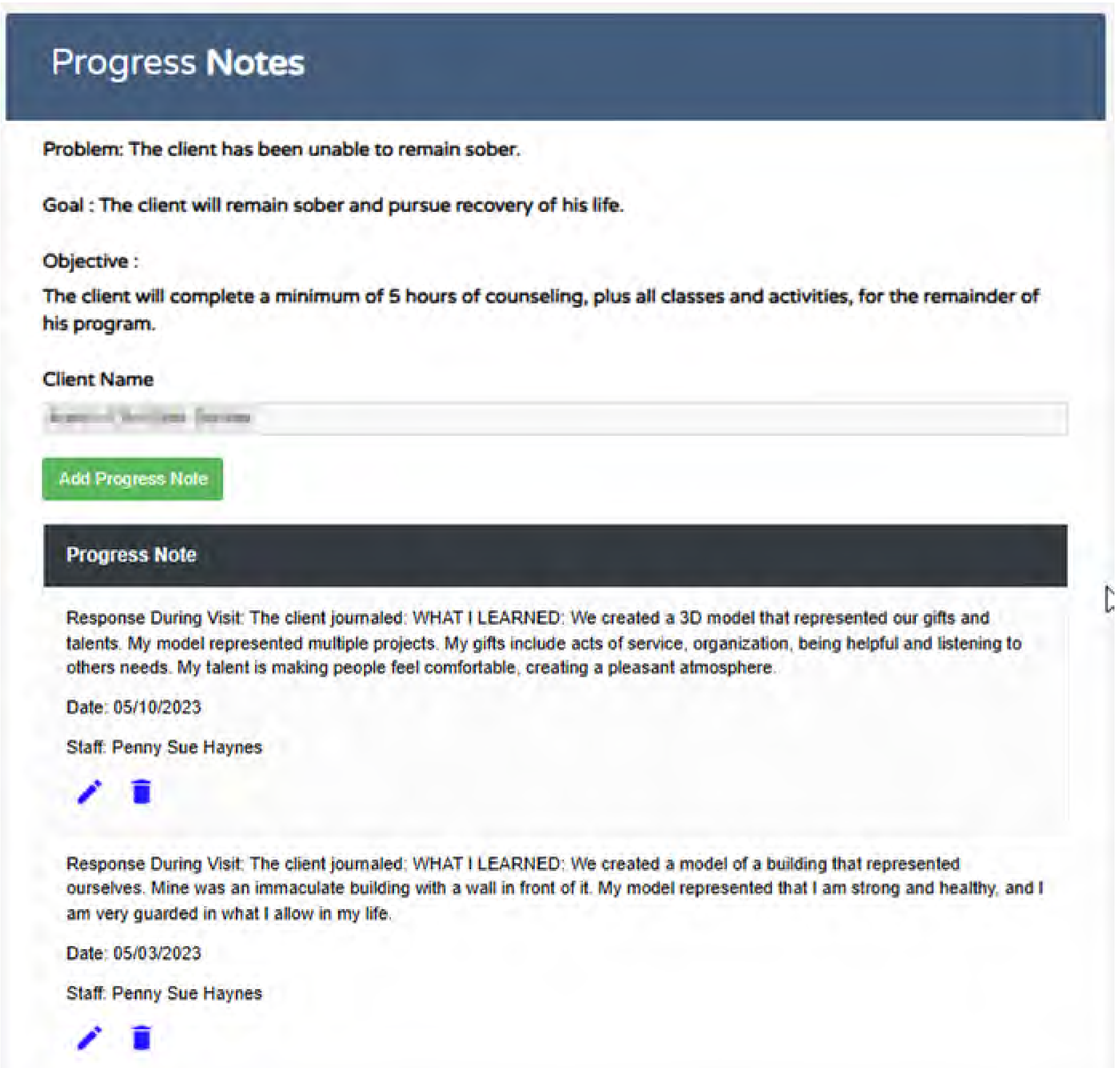


Then complete the fields in the form. It is based on DAP (Data, Assessment and Plan) Notes. Complete every required field, even if it is with NA (not applicable).

Progress Notes Chart



View the Client’s Treatment Plan along with the Client’s Treatment Plan Update notes, and whether or not the Objectives have been completed.



If you click on any Objective, you can enter Treatment Plan Notes for that Objective.

Treatment Report


Print Save as PDF

Demo Recovery House

347 Holly St, Canton, GA 30114

Mailing Address: PO BOX 328, Holly Springs, GA 30142-0006

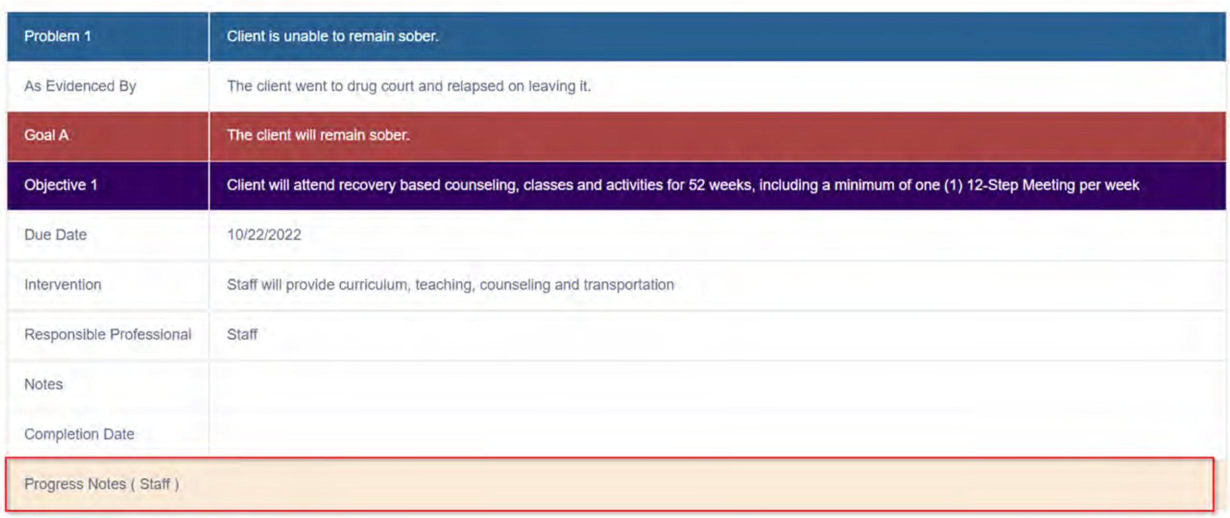
Phone: 678-459-2346 Fax: 888-826-6972

https://recoveryhousesoftware.com

Client Name	Garner C Nehemiah	Date of Birth	05/30/1984
Intake Date	10/22/2021	Date	11/01/2021
Initial Plan Date	11/01/2021	Plan Updated On	
Staff Name	Penny Haynes		
Mental Illness Diagnosis			
	SASSI-4 Screening Results Overview Random Responding: Results Indicate No Evidence of Random Responding Alcohol and/or Other Drug		

This is a printable and savable view of their entire assessment, treatment plan and objectives WITHOUT any client or staff notes.

Treatment Report (Staff)


Problem 1	Client is unable to remain sober.
As Evidenced By	The client went to drug court and relapsed on leaving it.
Goal A	The client will remain sober.
Objective 1	Client will attend recovery based counseling, classes and activities for 52 weeks, including a minimum of one (1) 12-Step Meeting per week
Due Date	10/22/2022
Intervention	Staff will provide curriculum, teaching, counseling and transportation
Responsible Professional	Staff
Notes	
Completion Date	
Progress Notes (Staff)	

This version shows Staff Treatment Plan Notes.

Treatment Report (Client & Staff)

As Evidenced By	The client went to drug court and relapsed on leaving it.
Goal A	The client will remain sober.
Objective 1	Client will attend recovery based counseling, classes and activities for 52 weeks, including a minimum of one (1) 12-Step Meeting per week
Due Date	10/22/2022
Intervention	Staff will provide curriculum, teaching, counseling and transportation
Responsible Professional	Staff
Notes	
Completion Date	
Progress Notes (User)	I have maintained my sobriety going on 12 weeks. I have attended celebrate recovery classes once a week for the past 12 weeks. - 12/30/2021 I have maintained my sobriety for for 20 weeks mow and I have attended 20 weeks of CR classes - 03/03/2022 I have attended 42 weeks of CR Classes - 06/09/2022
Progress Notes (Staff)	

This version shows Client and Staff Treatment Plan Notes.

Contact Page Related Contacts

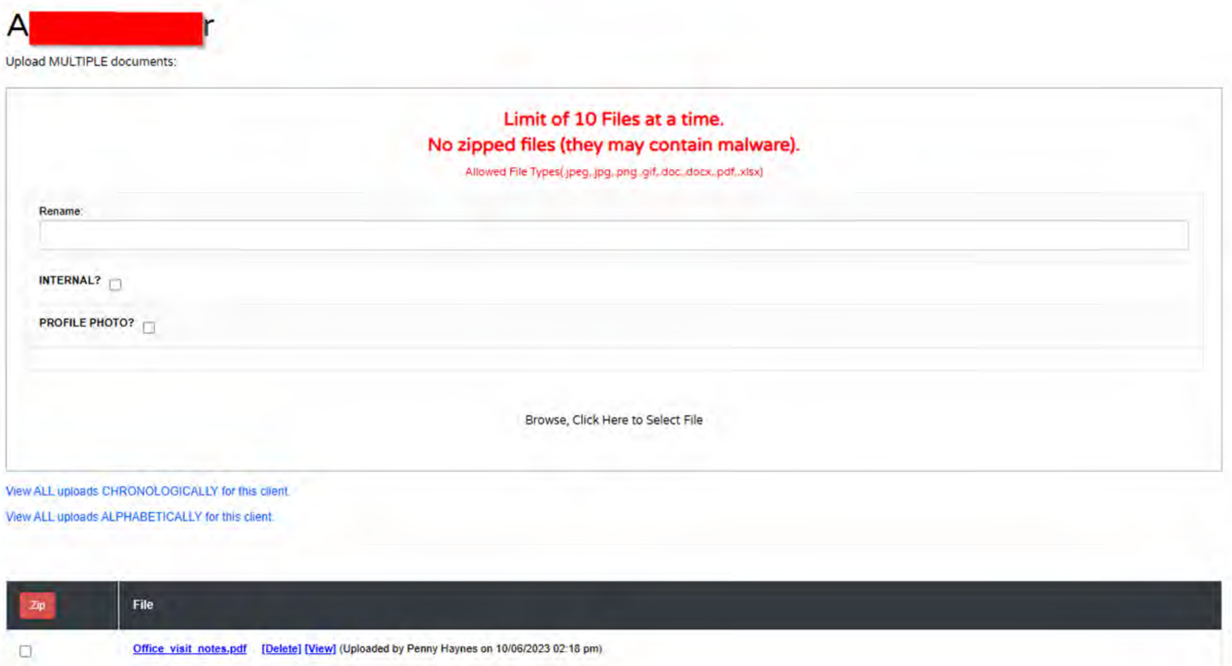
Contacts (1 Record) - Garner Nehemiah

Add a new record |

Contact ID	Contact Type ID	First Name	Middle Name	Last Name	Suffix	Title	Location	Address ID	Mailing Address ID	Primary Phone	Primary Email	Contact Notes	Contact Source	Organization ID	Staff Username	Contact Created Date
140	Emergency Contact	Ipsid		Ellie				4 L El Ga 30540 Gilmer	4 L El Ga 30540 Gilmer						admin	10/25/2021
268	Client Family	Kellen		Ellie											admin	11/11/2021
147	Client Family	Pearson		Karen				8 R JSP Ga 30143 Pickens							admin	10/25/2021
486	Supervising Officer	Ellie		Overhill											admin	02/15/2022

This shows any contacts that have this client selected as a related contact (bottom of contact page).

Contact Page Uploads



This is where you upload documents for the client.

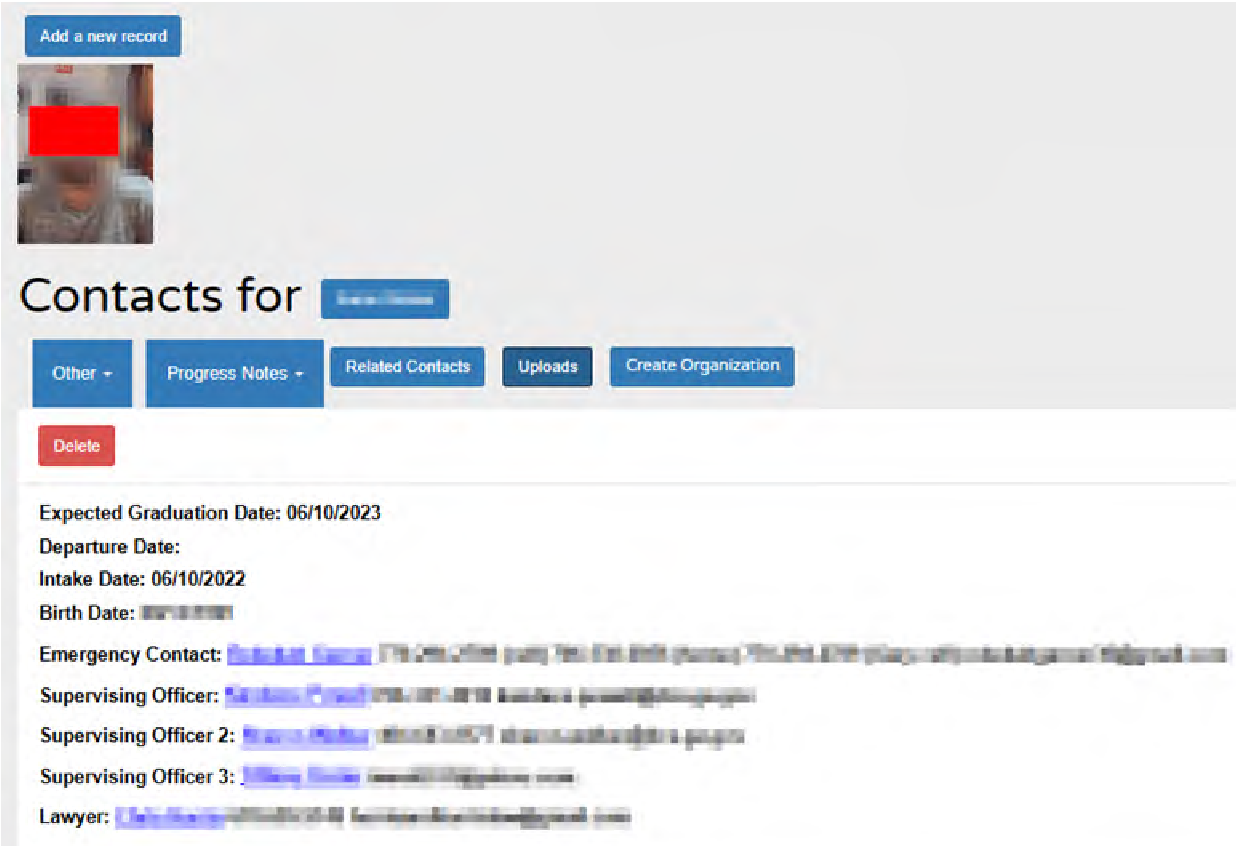
You can rename the document upon upload.

If you want the document to NOT be listed as a possible attachment in an email, check INTERNAL prior to uploading.

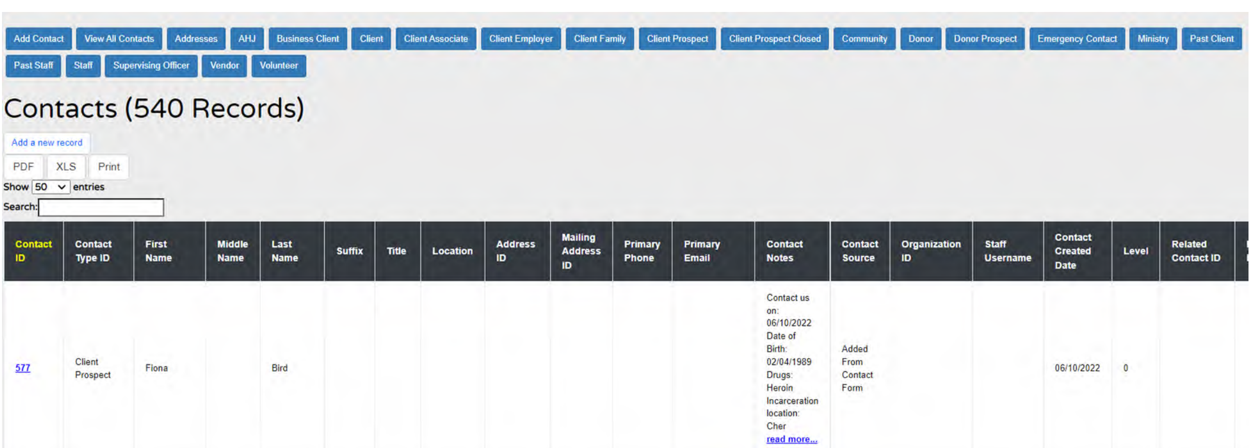
If you want the image uploaded to be a PROFILE PHOTO, check PROFILE PHOTO prior to uploading.

Client Contact Page Information At A Glance

Important information entered into the Client Info page shows up at the top of the Contact Page as At-A-Glance Reference information (Graduation Date, Intake Date, Departure Date, Date of Birth, Emergency Contact, Supervising Officer(s), Lawyer).



View All Contacts



You can export this table of information to PDF, XLS, or Print.

You can select the number of entries, or rows, to display.

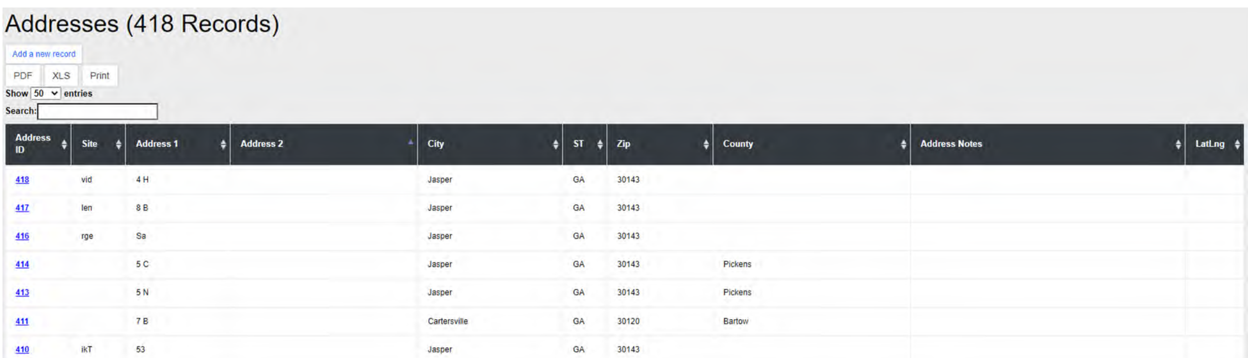
You can search for data within the columns.

You can filter by Contact Types.

You can sort by 1 column at a time.

You can select a record to view or edit it.

Addresses



Addresses (418 Records)

Add a new record

PDF XLS Print

Show 50 entries

Search:

Address ID	Site	Address 1	Address 2	City	ST	Zip	County	Address Notes	LatLng
418	vid	4 H		Jasper	GA	30143			
417	len	8 B		Jasper	GA	30143			
416	rge	Sa		Jasper	GA	30143			
414		5 C		Jasper	GA	30143	Pickens		
413		5 N		Jasper	GA	30143	Pickens		
411		7 B		Cartersville	GA	30120	Bartow		
410	ikT	53		Jasper	GA	30143			

You can export this table of information to PDF, XLS, or Print.

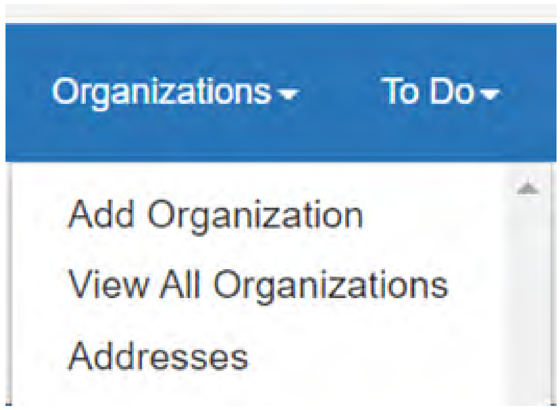
You can select the number of entries, or rows, to display.

You can search for data within the columns.

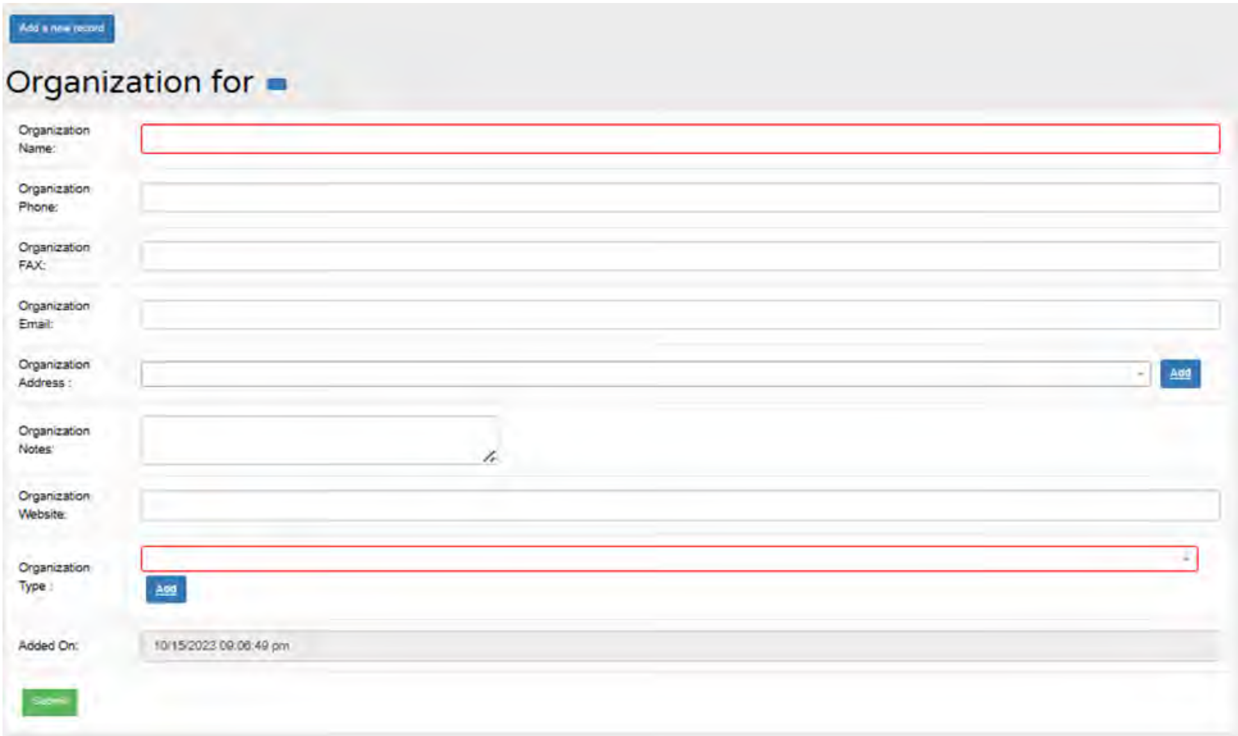
You can sort by 1 column at a time.

You can select a record to view or edit it.

ORGANIZATIONS



Add Organization

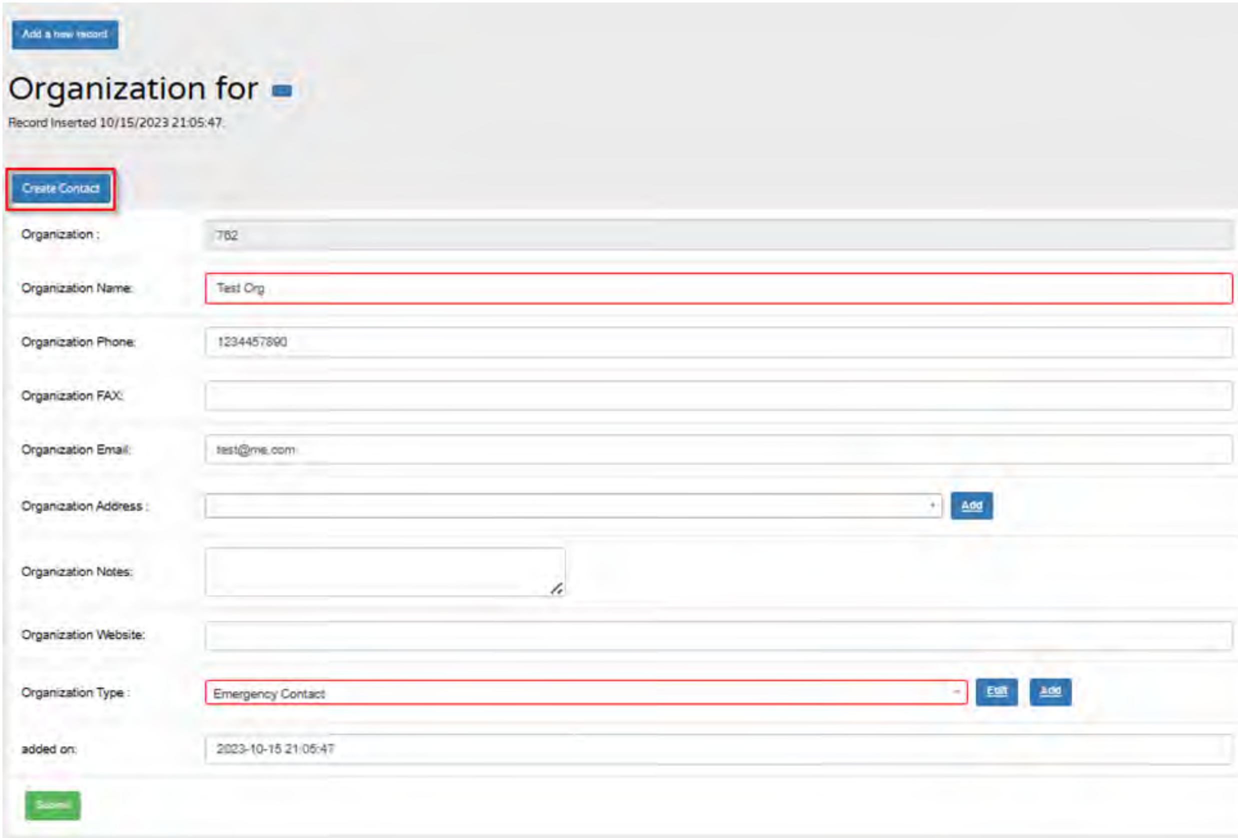


Only required fields are Organization Name and Organization Type.

It is best to enter all of the Organization field data first and Submit.

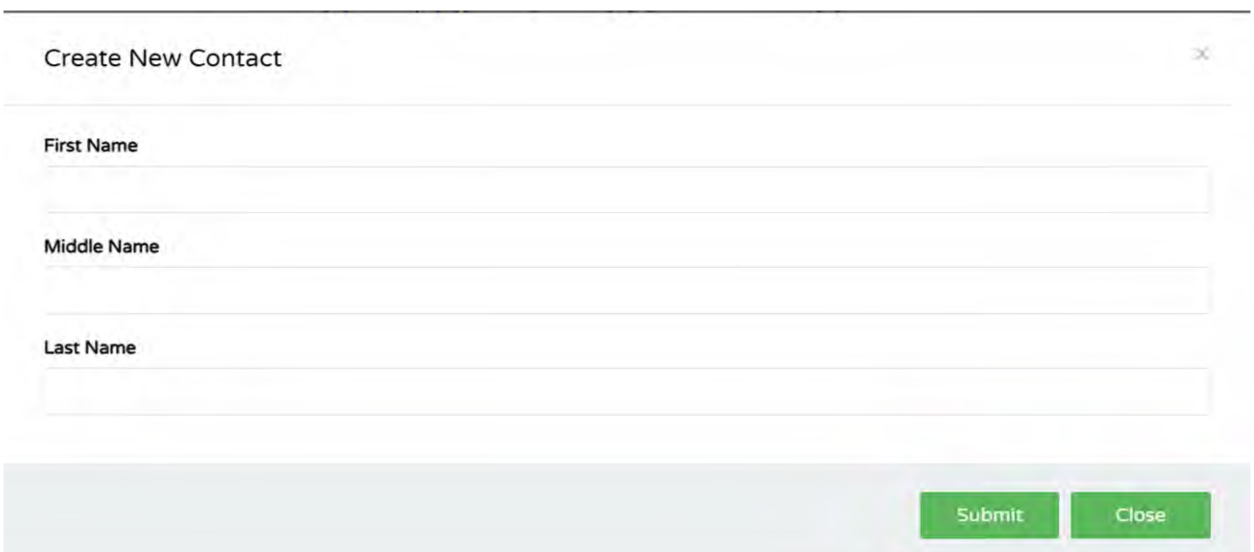
Then you can Addresses by clicking the Add button, which brings up a pop-up form.

After you enter the new information and close out the pop-up form, select the new information from the drop-down box and press Submit.



After you create an Organization, you can also create a new Contact based on the Organization Information.

Click Create Contact



Fill in the First, Middle (if any), and Last Name. It can be the name of the Organization (Walmart Walmart) if you want. Press Submit. A new Contact will be added with this Organization selected as the associated Contact Organization.

View All Organizations

Organization (516 Records)

Add a new record

PDF XLS Print

Show 50 entries

Search:

Organization ID	Organization Name	Organization Phone	Organization FAX	Organization Email	Organization Address ID	Organization Notes	Organization Website	Organization Type ID	added on
531	vid &				vid 4 H Jasper GA 30143			Donor	2022-06-06 15:29:14
530	y Ste							Client Family	2022-06-01 19:38:51
529	hley							Client	2022-06-01 19:35:11
528	CKY F							Emergency Contact	2022-06-01 17:44:52

You can export this table of information to PDF, XLS, or Print.

You can select the number of entries, or rows, to display.

You can search for data within the columns.

You can sort by 1 column at a time.

You can select a record to view or edit it.

Addresses

Addresses (418 Records)

Add a new record

PDF XLS Print

Show 50 entries

Search:

Address ID	Site	Address 1	Address 2	City	ST	Zip	County	Address Notes	LatLng
418	vid	4 H		Jasper	GA	30143			
417	len	8 B		Jasper	GA	30143			
416	rge	Sa		Jasper	GA	30143			
414		5 C		Jasper	GA	30143	Pickens		
413		5 N		Jasper	GA	30143	Pickens		
411		7 B		Cartersville	GA	30120	Bartow		
410	ikT	53		Jasper	GA	30143			

You can export this table of information to PDF, XLS, or Print.

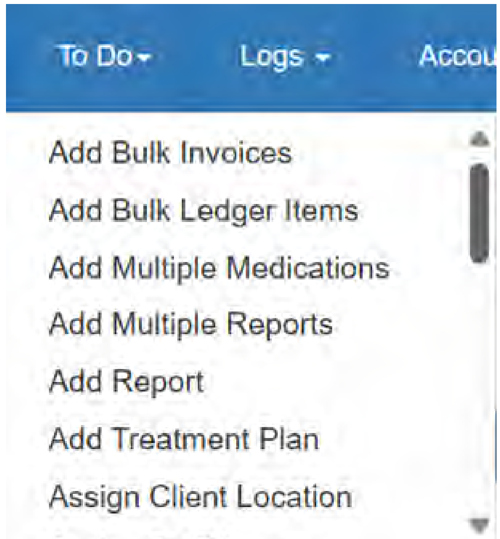
You can select the number of entries, or rows, to display.

You can search for data within the columns.

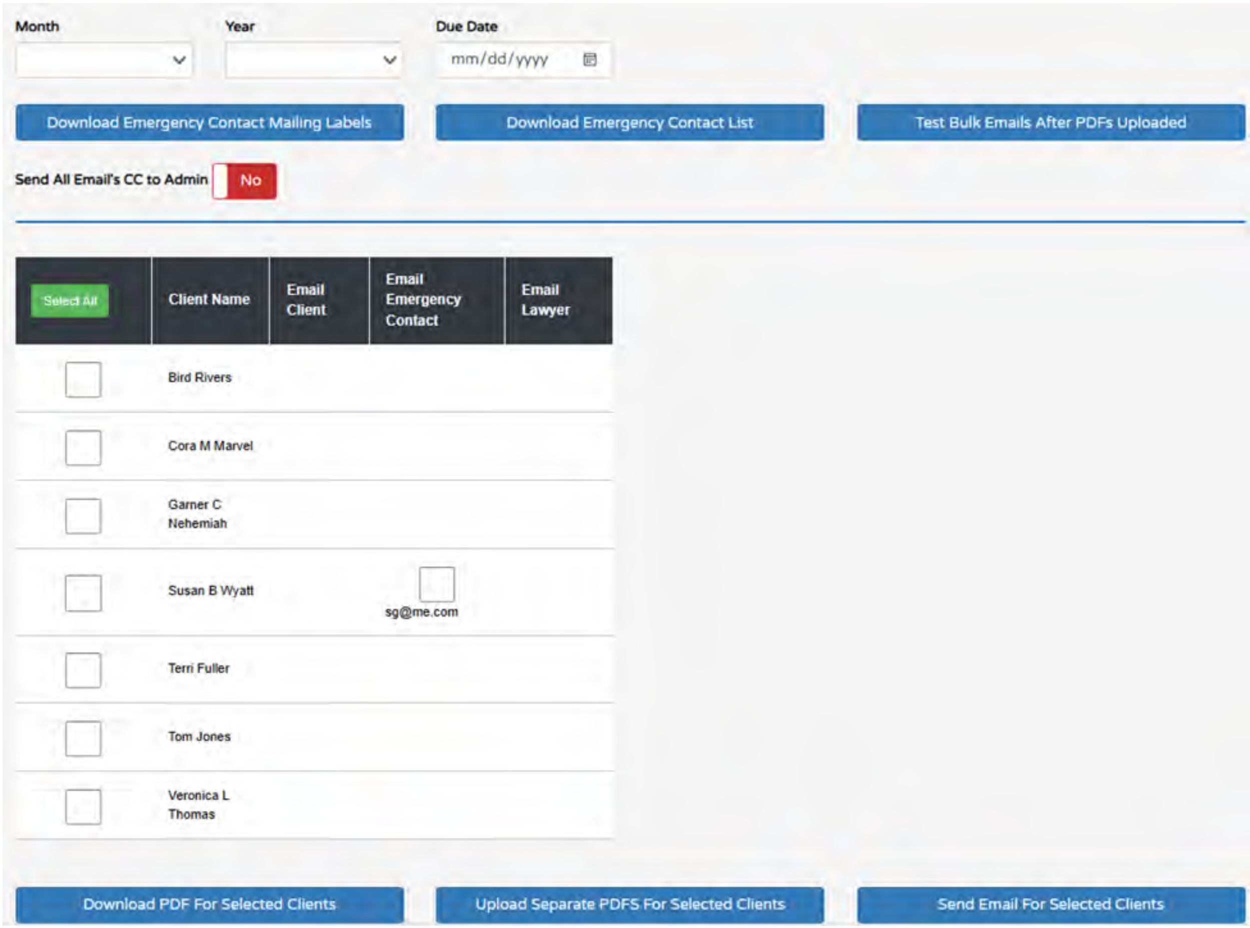
You can sort by 1 column at a time.

You can select a record to view or edit it.

TO DO


To Do
Logs
Add Bulk Invoices
Add Bulk Ledger Items
Add Multiple Medications
Add Multiple Reports
Add Report
Add Treatment Plan
Assign Client Location

Add Bulk Invoices



Select the Month and Year for the Services being invoiced, and Due Date for the Invoice. (REQUIRED)

You can review the Emergency Contact List, download mailing labels if needed, and after you have pressed the button to create and upload all client invoices, you can Test the system by having a few of them emailed to you for review.

There is a button to have your Admin email (the one entered in the Admin Dashboard) receive a copy of each invoice sent, in case you need to forward one again, or just to keep an additional set of records in your email.

Click on Select All or on the individual Clients you want to create an invoice for. (REQUIRED)

Then you can select on the email addresses of the people you want to email the invoice to. If they have email addresses, the people listed will be the client, the Emergency Contact and the Lawyer. (REQUIRED IF EMAILING INVOICES)

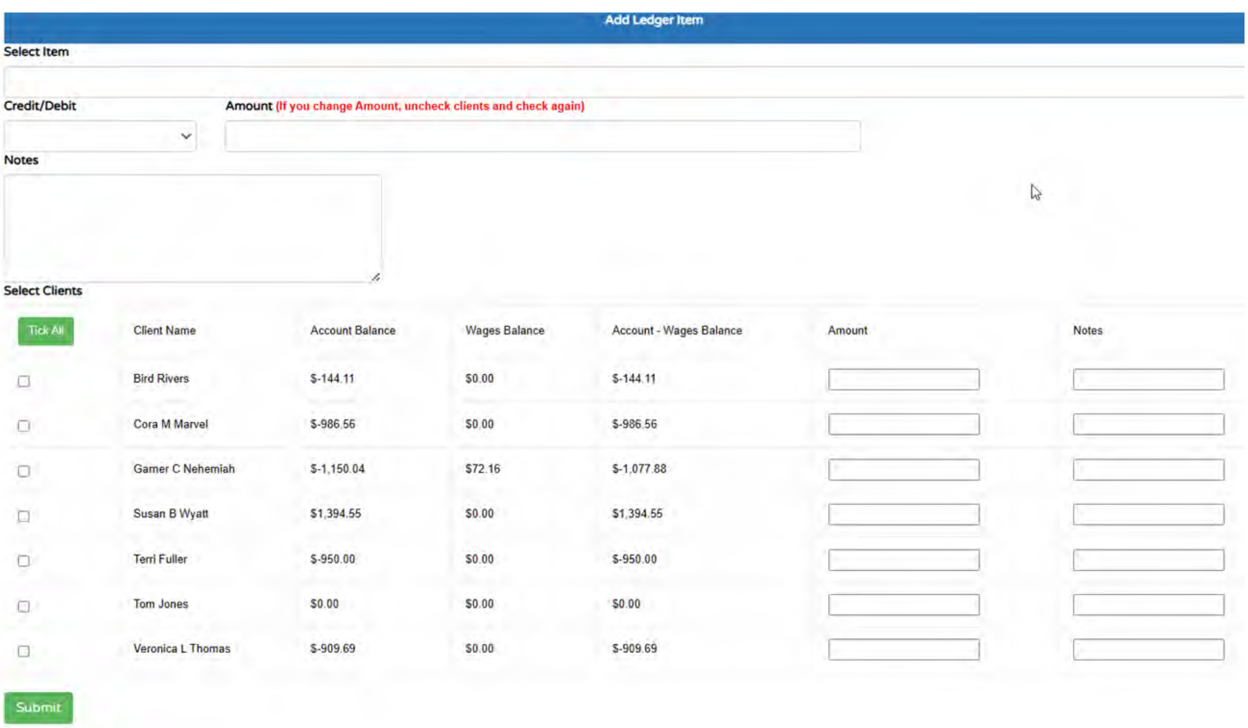
Then click Download PDF for Selected Clients to review the Invoices for accuracy if you choose.

Then click Upload Separate PDFs for Selected Clients and Invoices will be created, saved as PDF and uploaded to each Client's upload folder. (REQUIRED BEFORE sending detailed invoices.)

This is the point you may want to send a practice run of a few emails with the button on the top right.

Otherwise, you can click the Send Emails for Selected Clients button to email all Invoices with the PDF attachment. (REQUIRED).

Add Bulk Ledger Items

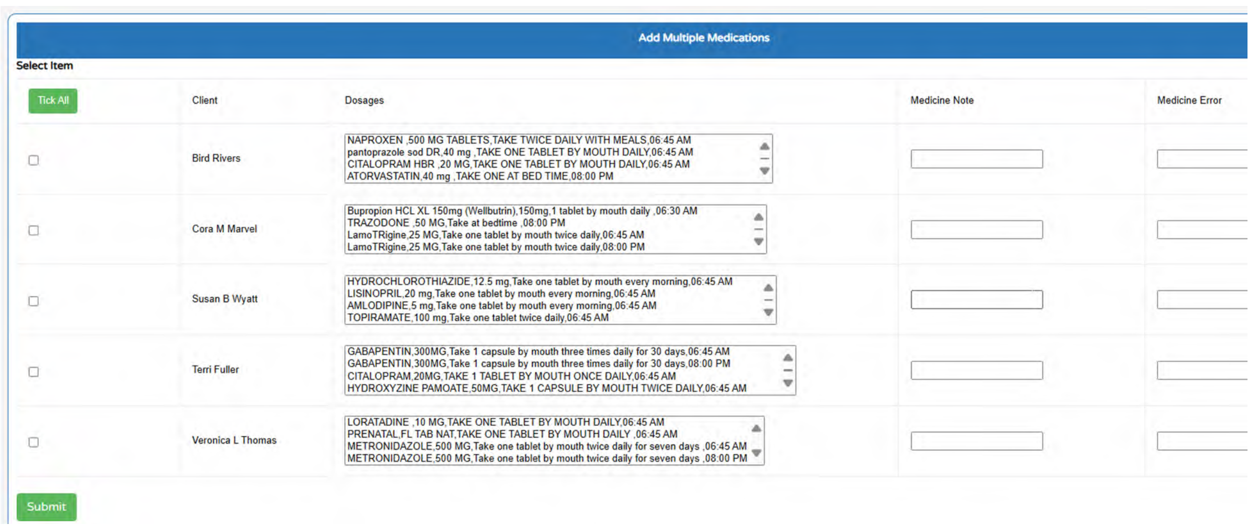


Like Add Multiple Report, you can add multiple charges to multiple clients at one time, and edit the amounts and notes.

Select an Item. Select Debit or Credit. Enter the amount being charged or added. Enter any applicable notes.

Click Tick All or check individual Clients. The information at the top of the page will be added to the right of each selected client. Press Submit to add these amounts to each Client's Ledger.

Add Multiple Medications



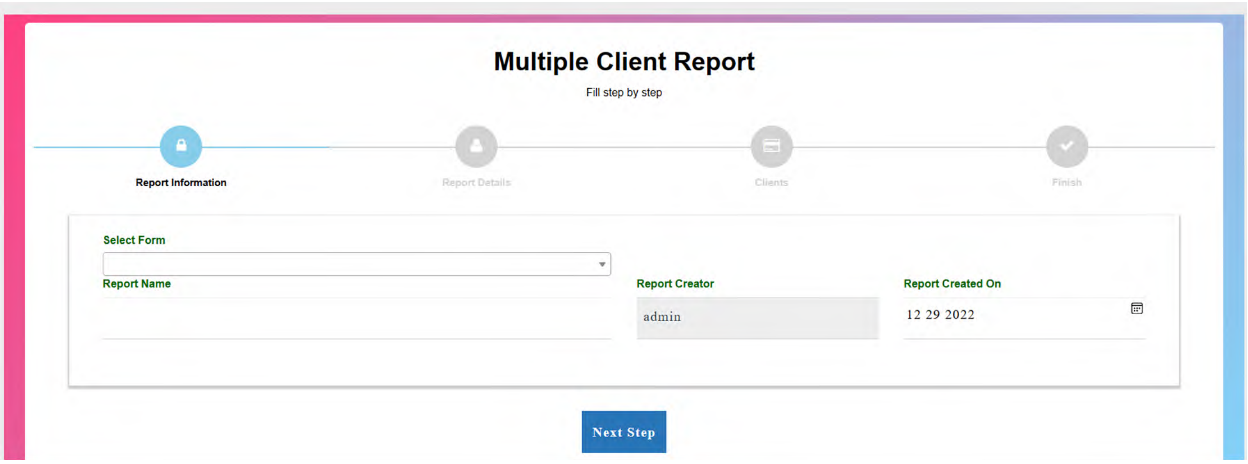
Select the Clients who are receiving medication(s) or select Tick All. Only clients with medication assigned to them will show up on this Form.

Then select the medication(s) for each person that are being received.

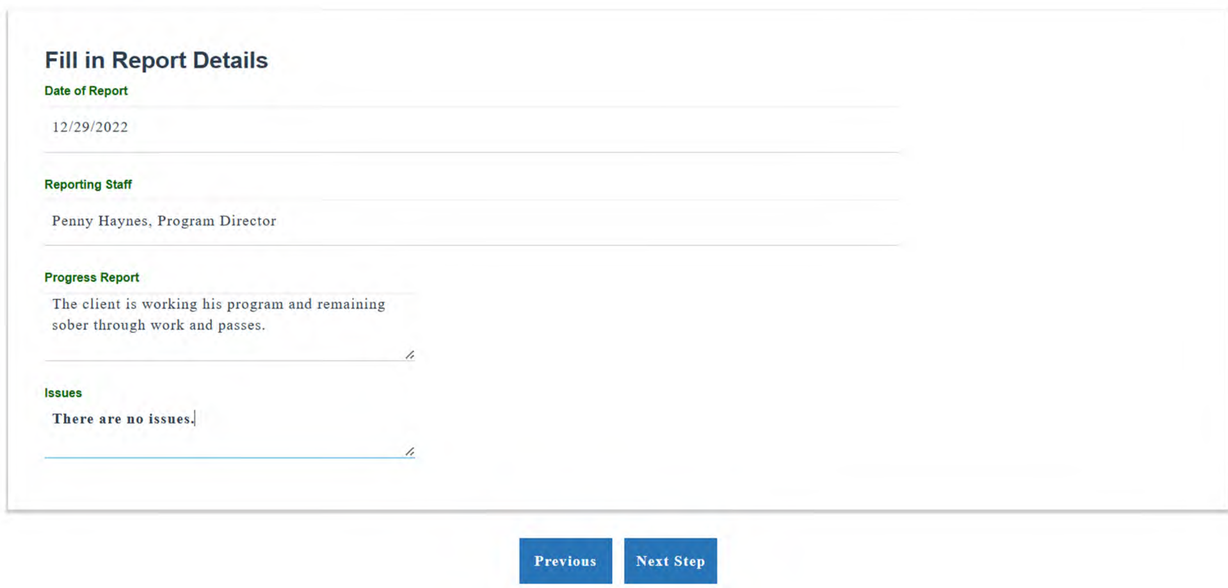
You can add a Medicine Note (the client took several doses home on pass) or Medicine Error (the client took the medication late).

Then press Submit and these will be added to each Selected Client's Medication Log.

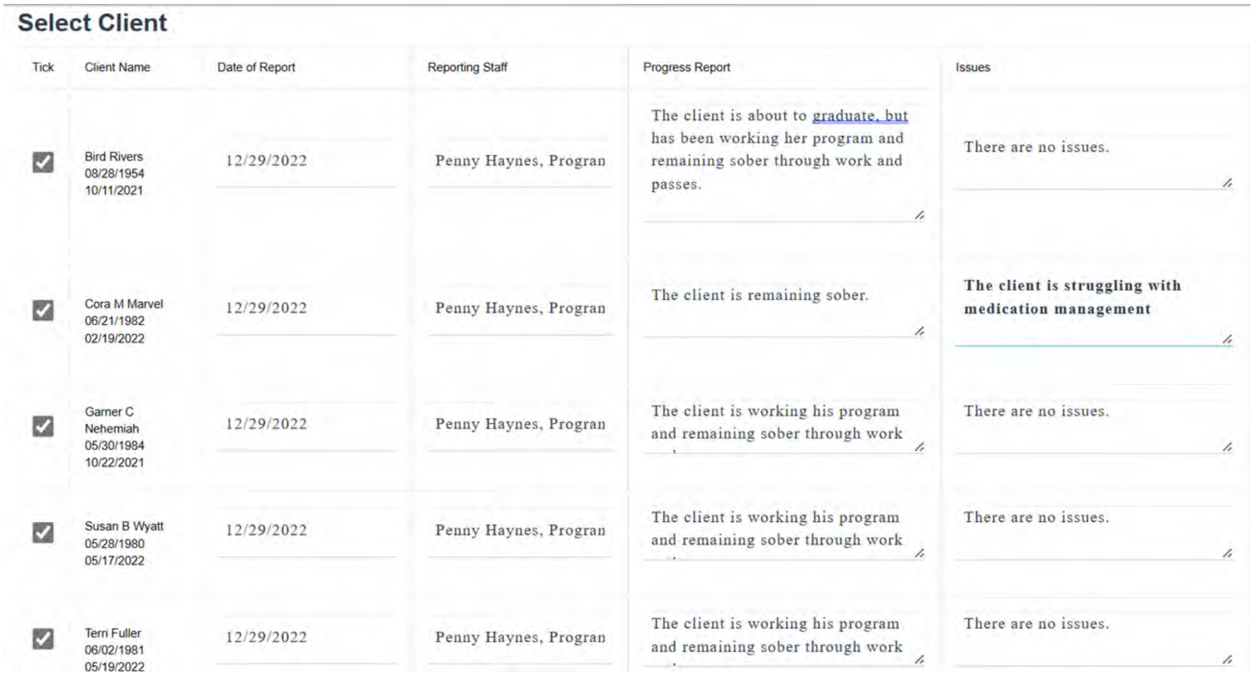
Add Multiple Reports



Select a report from the Select Form drop down box. Add the name. Go to the next step.



Fill in the fields in the report. Use whatever you will be entering for the majority of reports.



Select Client

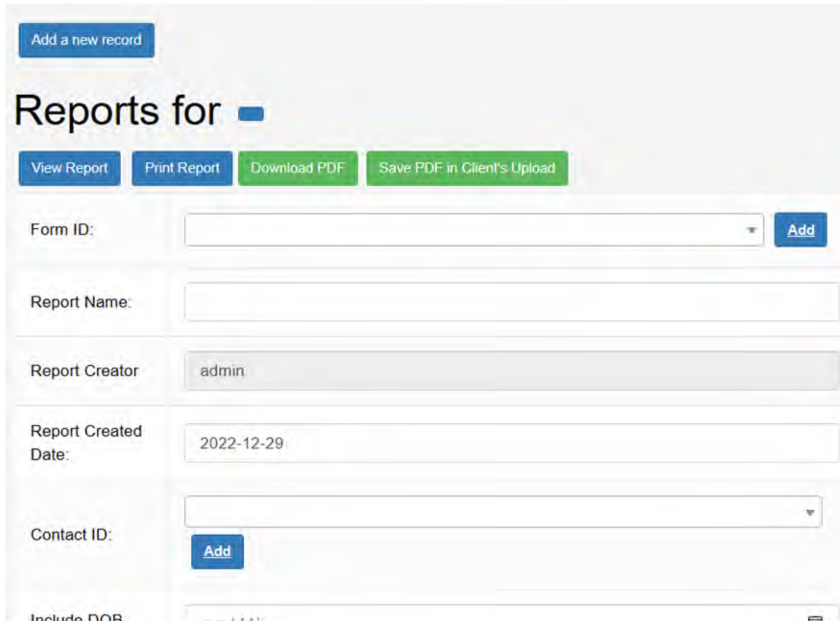
Tick	Client Name	Date of Report	Reporting Staff	Progress Report	Issues
☑	Bird Rivers 08/28/1954 10/11/2021	12/29/2022	Penny Haynes, Progran	The client is about to graduate, but has been working her program and remaining sober through work and passes.	There are no issues.
☑	Cora M Marvel 06/21/1982 02/19/2022	12/29/2022	Penny Haynes, Progran	The client is remaining sober.	**The client is struggling with medication management**
☑	Garner C Nehemiah 05/30/1984 10/22/2021	12/29/2022	Penny Haynes, Progran	The client is working his program and remaining sober through work	There are no issues.
☑	Susan B Wyatt 05/28/1980 05/17/2022	12/29/2022	Penny Haynes, Progran	The client is working his program and remaining sober through work	There are no issues.
☑	Terri Fuller 06/02/1981 05/19/2022	12/29/2022	Penny Haynes, Progran	The client is working his program and remaining sober through work	There are no issues.

Next, select the contacts you want to save reports for, and make any edits to the content as required.

If there is a Template in the field, it will be saved to the report after you press submit and cannot be edited from this page, but can be edited on the individual reports from the next page.

When you press Submit, the reports will be created for each selected client, saved as a PDF and stored in each contact's Uploads.

Add Report

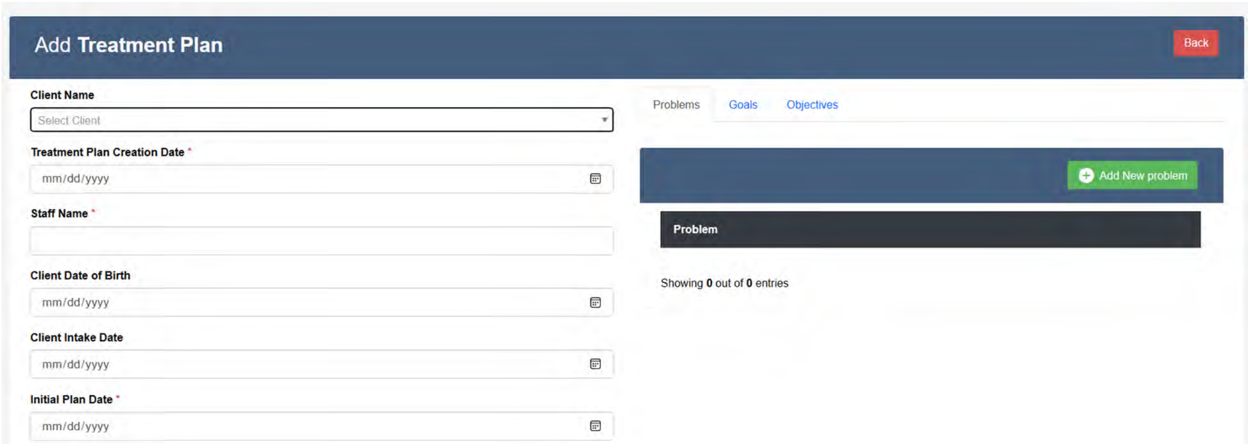


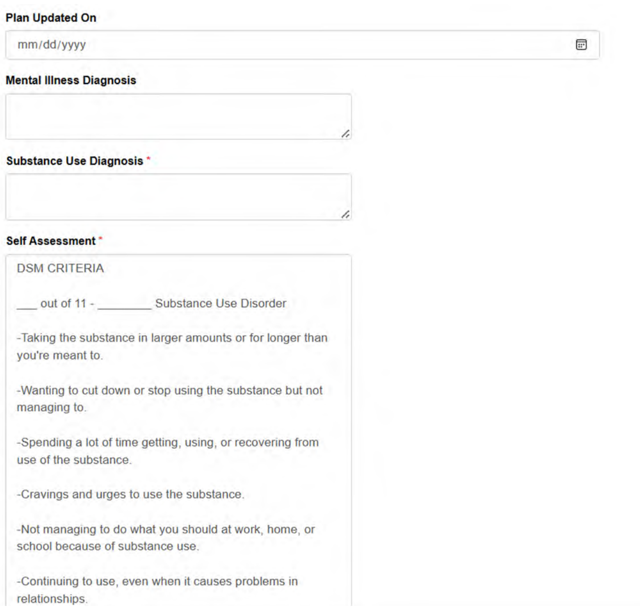
Add an individual report. Select a report from the drop down box and then complete the report. You can have the report add the Client Date of Birth, Intake Date and Departure Date. This top part is found on almost all Reports. Press Submit.

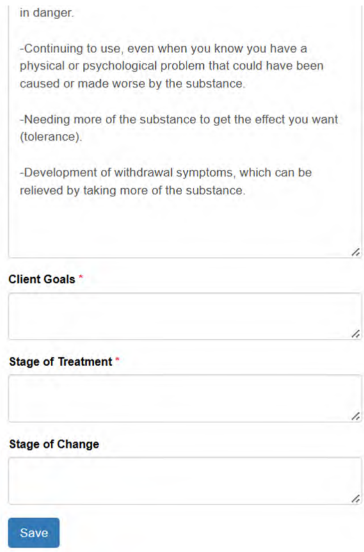
Then you complete the 2nd part of the form, which will have different fields depending on the Report. Press Submit.

You can then View, Print, Download as a PDF or Save the PDF in the Client's Upload folder.

Add Treatment Plan

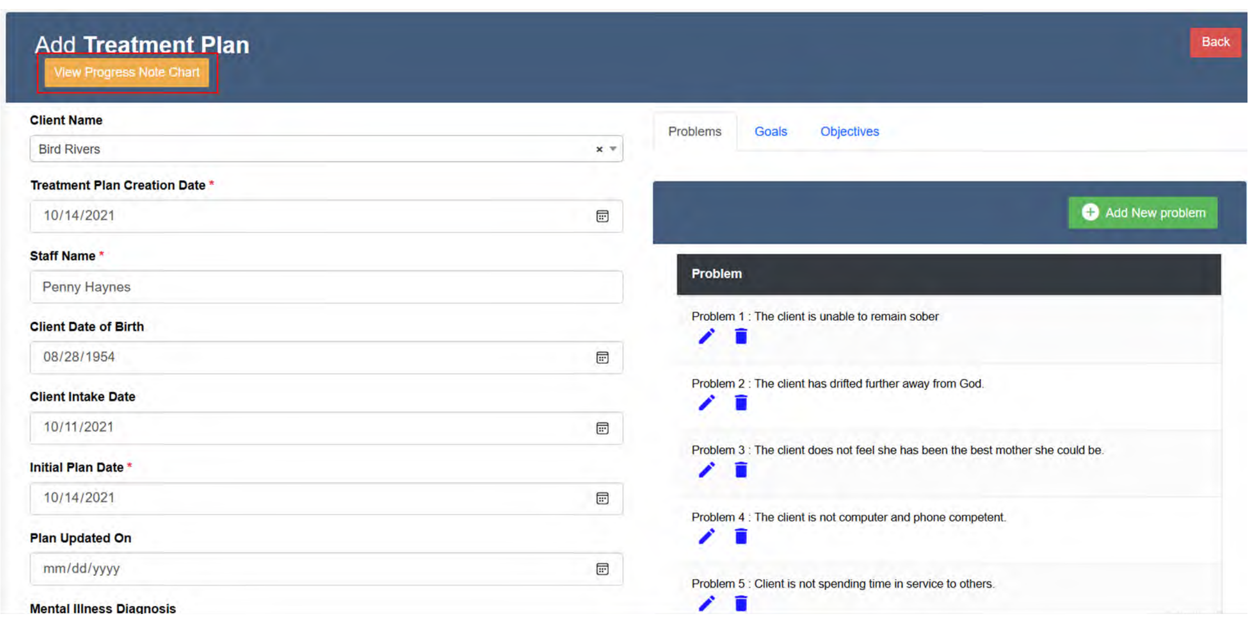






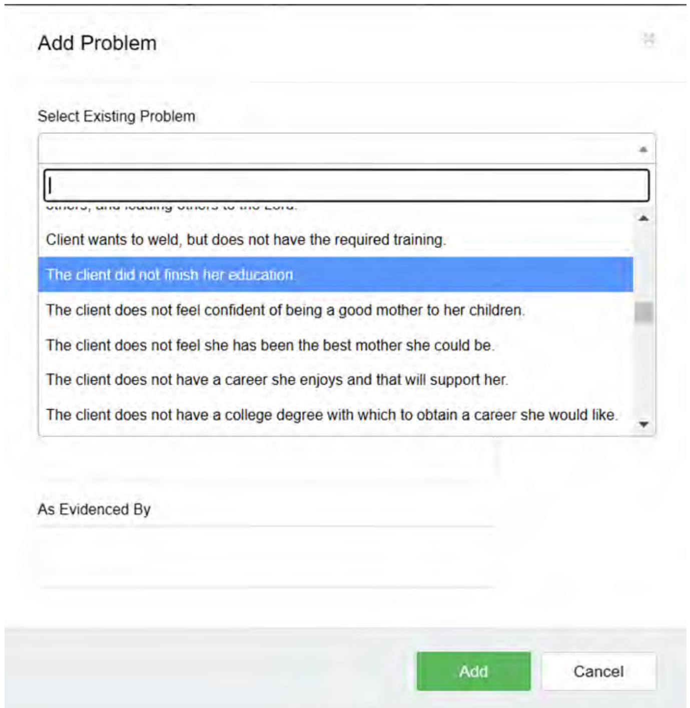
Select a client to create or view their Treatment Plan to edit it.

A Client MUST have a Client Info record to show up in the Client drop down box, as this form pulls Intake Date for the client.

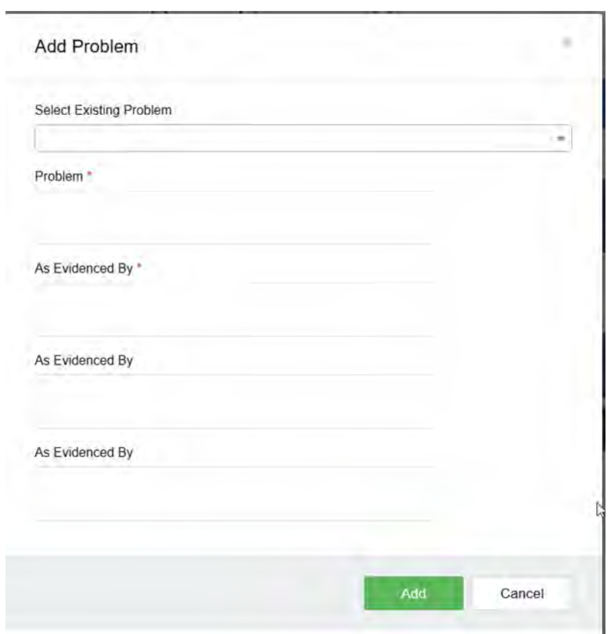


Once selected, you can click on View Progress Note Chart to see what Treatment Plan update notes the client has entered to prove they are working on their Treatment Plan.

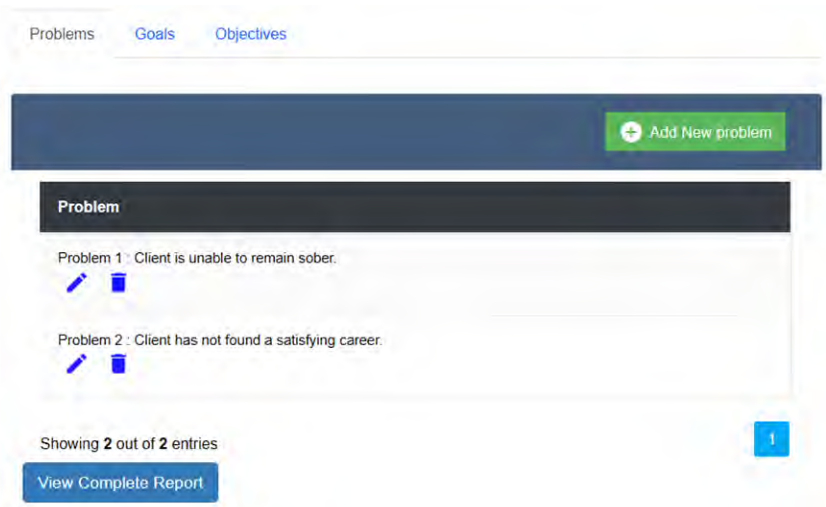
Client and Assessment information goes on the left-hand side, while Problems, Goals and Objectives are completed on the right-hand side of the form.



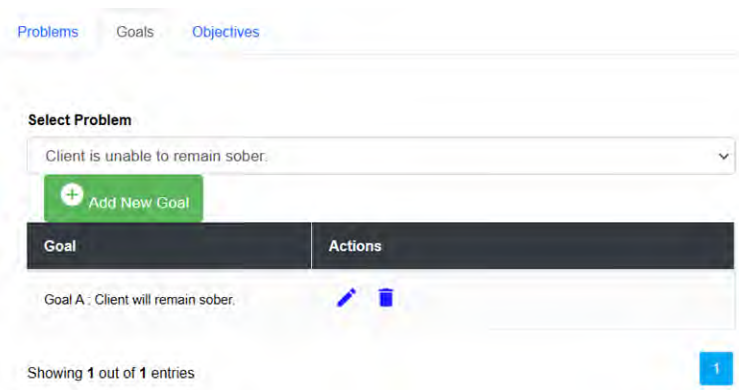
When you Add a Problem, Goal or Objective, it will allow you to select from previously created Problems, Goals and Objectives, to allow for more efficient and uniform Treatment Plans.



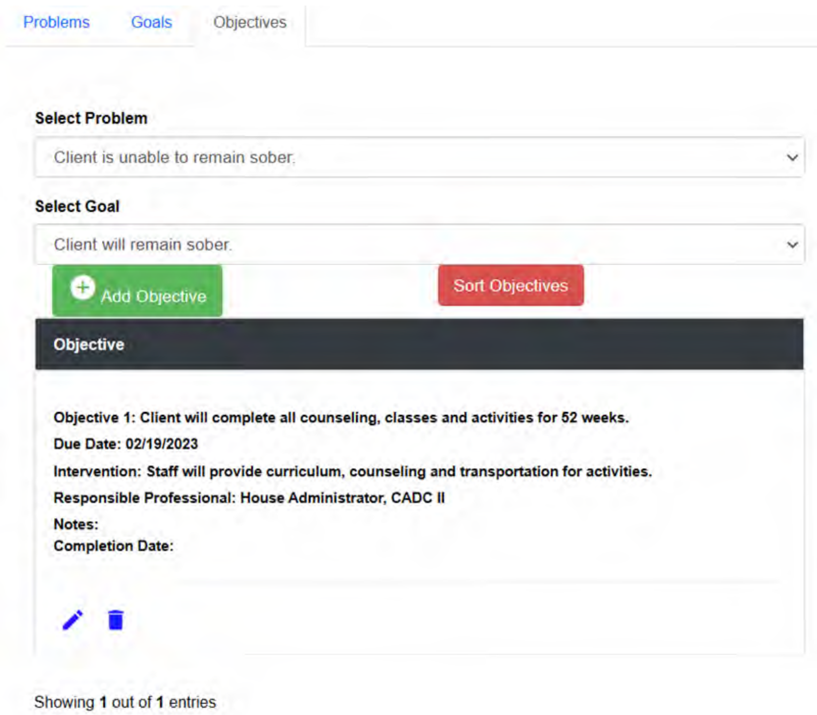
If nothing fits, then use the box below it to create a new entry.



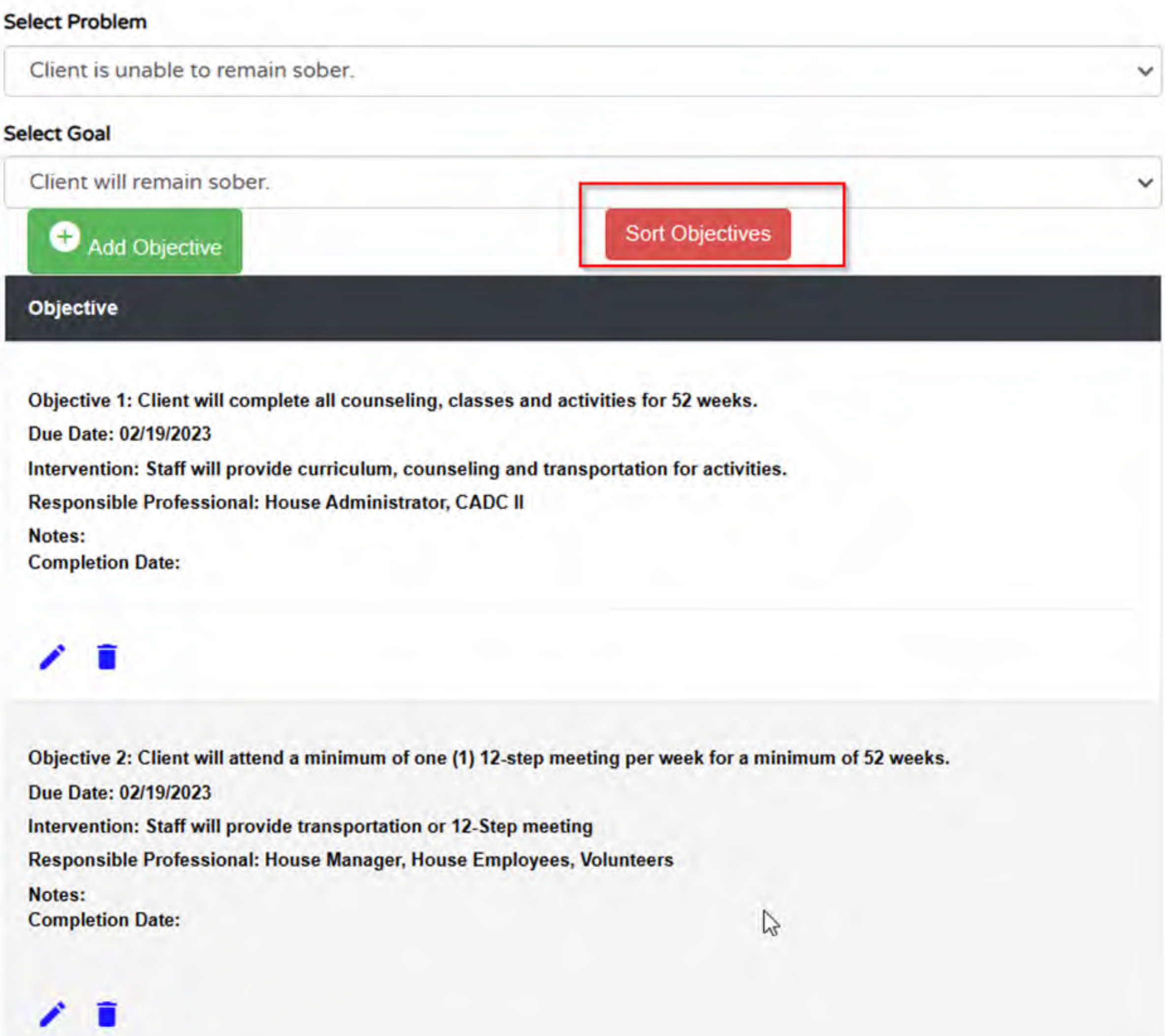
First enter the Problem.



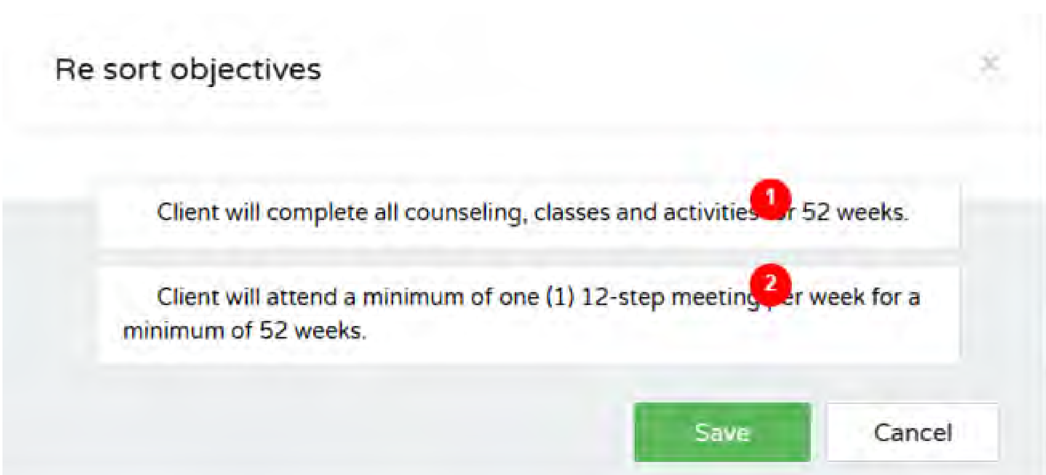
Next, select the Problem and enter the Goals.



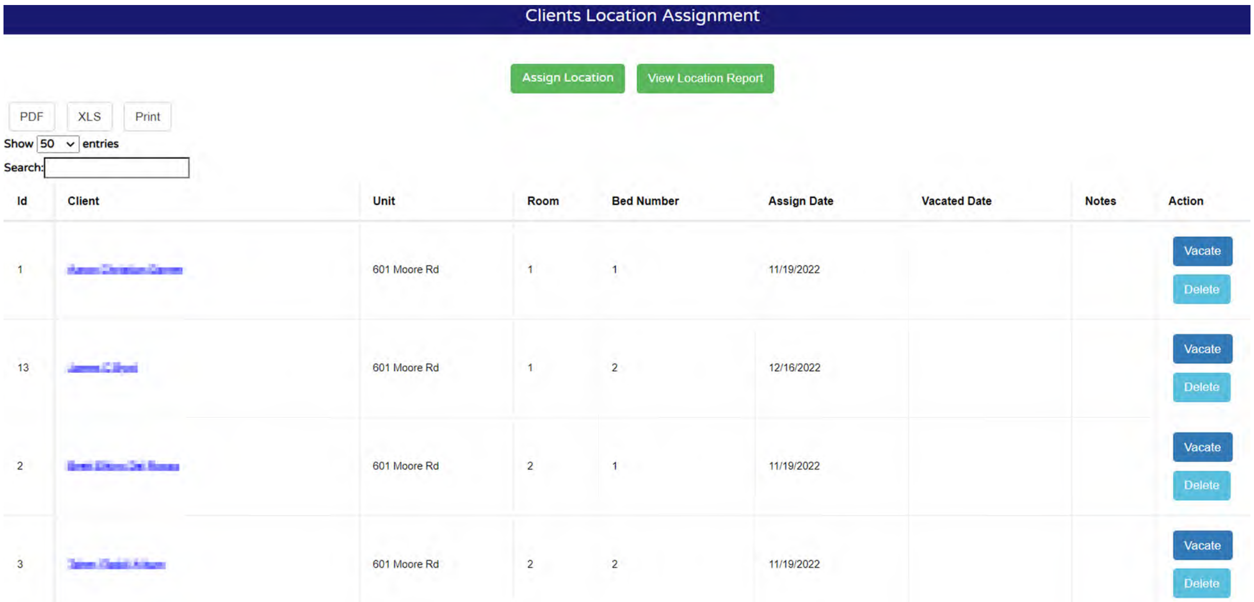
Then select the Problem and Goal and enter the Objectives.



You can also change the order of the Objectives by clicking Sort Objectives and clicking and dragging, then press Save.

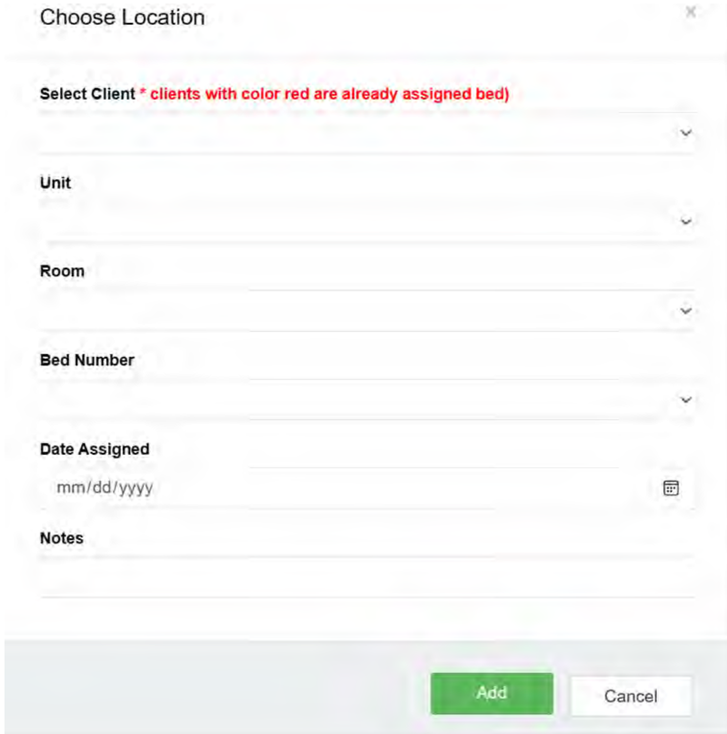


Assign Client Location

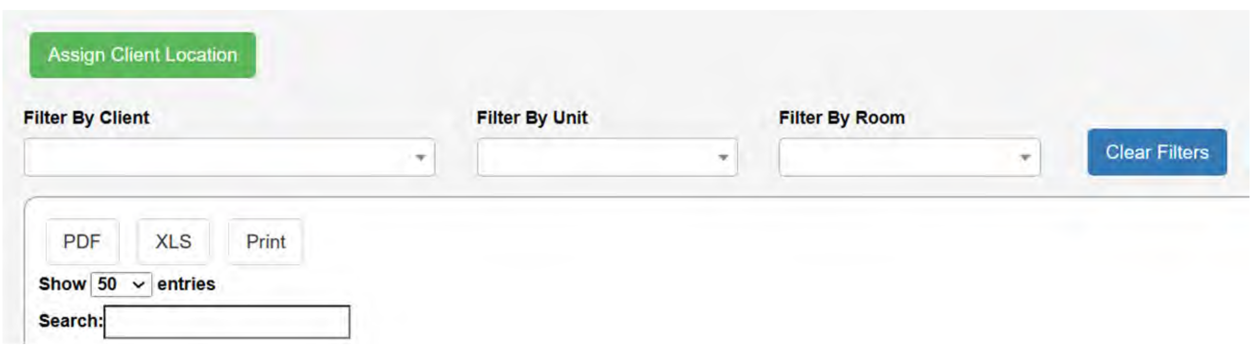


Assign locations and view the Location Reports (locations where clients have stayed during their program).

BEFORE you move someone, have them VACATE a bed so someone else can be moved into it. If you mistakenly assign someone a location, use DELETE to remove the assignment.

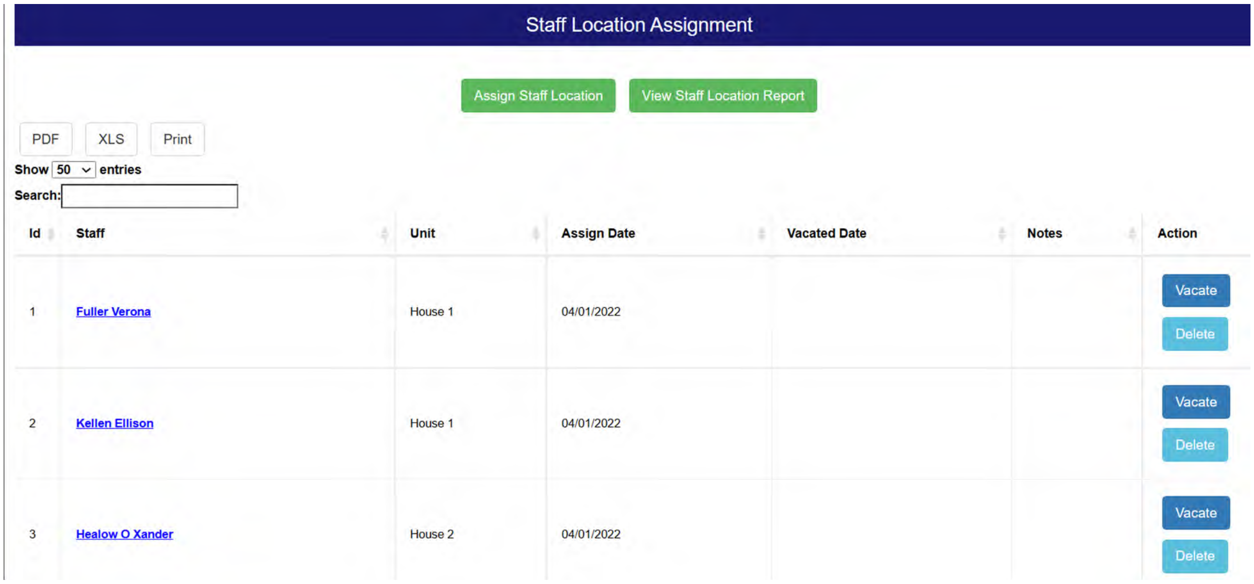


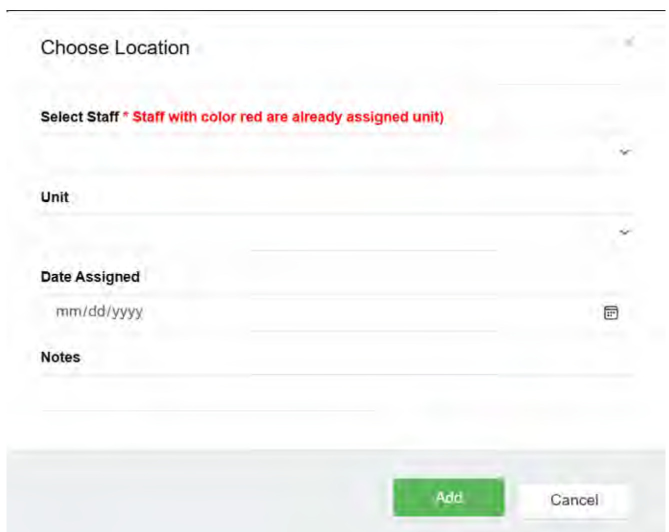
You cannot double assign a client. The program will not allow you. You also cannot select a room if all of the beds are occupied.



You can also run a report to see the different locations where a single client has stayed, filter by Unit or Room.

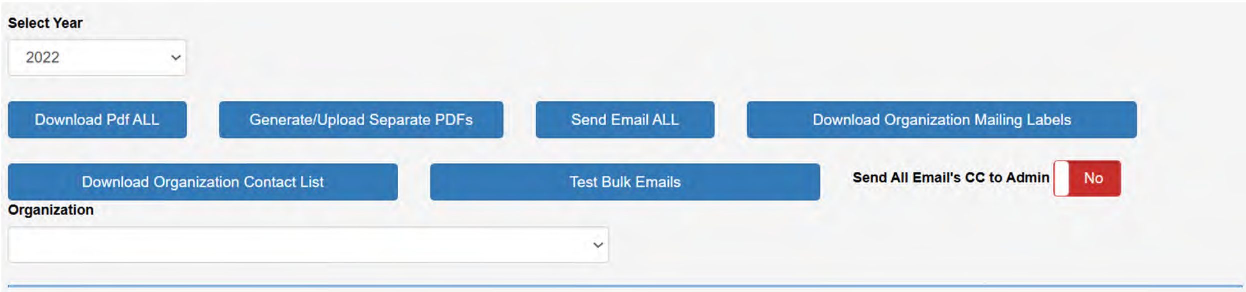
Assign Staff Location





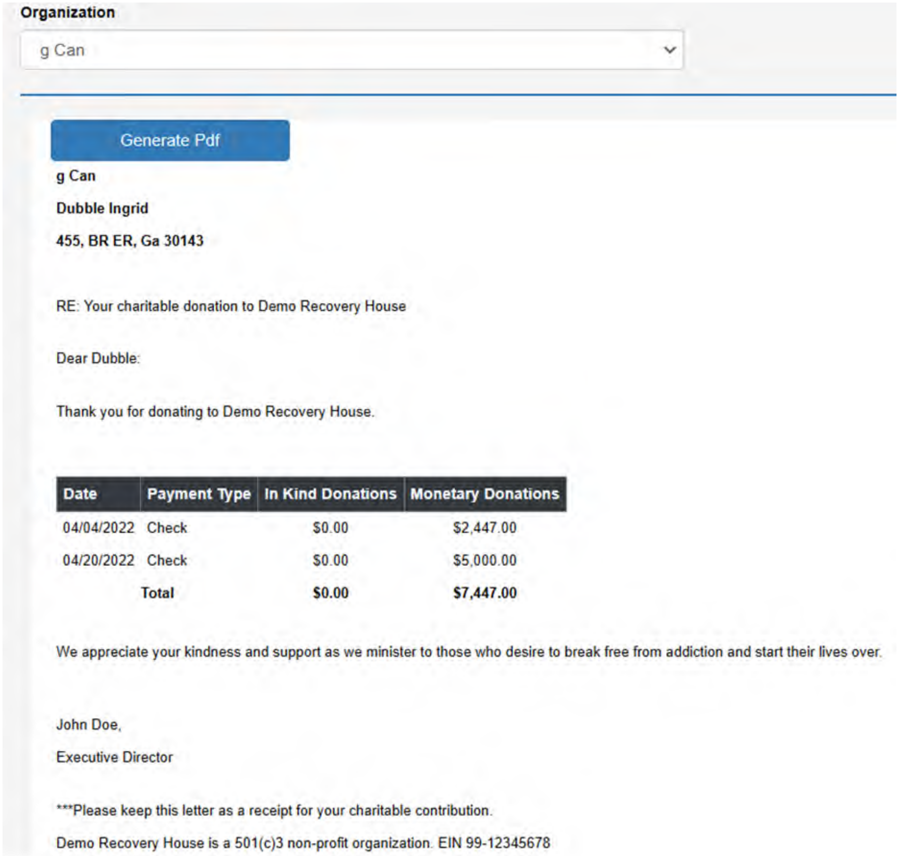
Assign Staff to locations. This will not limit them from seeing all of the information if they need it. However, the Dashboard will default to filter for their location. You can create an Administration location if Staff is not in a particular housing location.

Bulk Donation Report



If you are using our Accounting functions to keep track of Donations, this report will help you get out Donation Letters quickly at the beginning of each year.

1. You can download a PDF of all of the letters to review them for accuracy or mail them.
2. You can create a PDF of each individual letter and have it saved to that Donor's Uploads.
3. You can press one button and it will email the Donation Letter with the PDF attachment of the Donation Letter to each Donor with an email address on file.
4. For Donors without an email address, or to send backup letters via mail, you can download the Mailing Labels of every donor's address printed in the same order as the PDF of all of the Donor Letters.
5. You can download your Donor list to check addresses or see who needs a phone number or email address.
6. You can test your Bulk Email before you send it out (it will send to your Administrative email).
7. You can also choose to send a copy of every Donation Letter email to your Administrative email as verification that it was sent.



Organization

g Can

Generate Pdf

g Can

Dubble Ingrid

455, BR ER, Ga 30143

RE: Your charitable donation to Demo Recovery House

Dear Dubble:

Thank you for donating to Demo Recovery House.

Date	Payment Type	In Kind Donations	Monetary Donations
04/04/2022	Check	$0.00	$2,447.00
04/20/2022	Check	$0.00	$5,000.00
	Total	**$0.00**	**$7,447.00**

We appreciate your kindness and support as we minister to those who desire to break free from addiction and start their lives over.

John Doe,

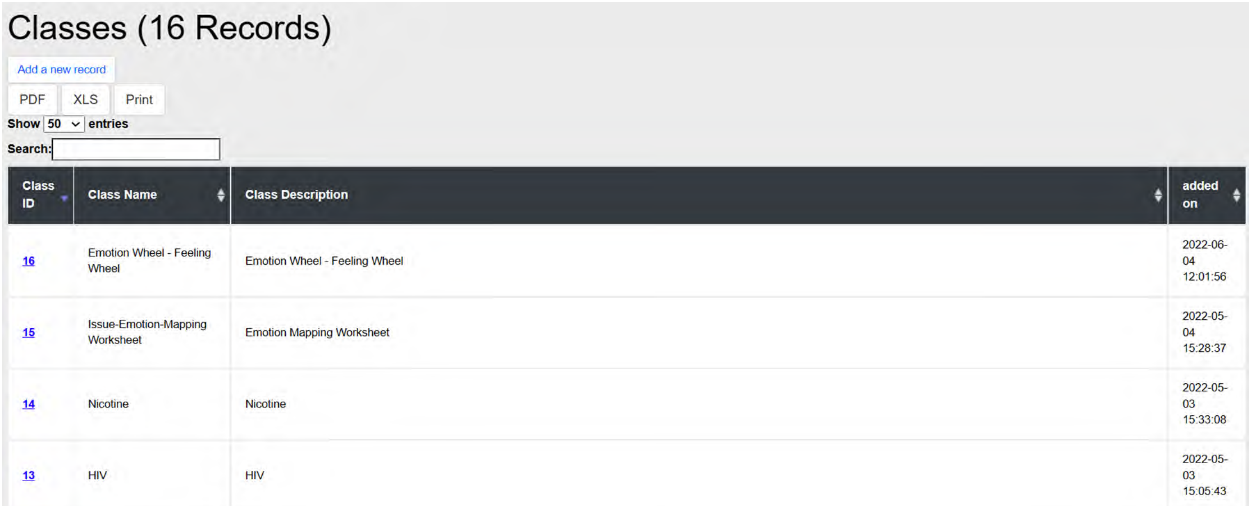
Executive Director

***Please keep this letter as a receipt for your charitable contribution.

Demo Recovery House is a 501(c)3 non-profit organization. EIN 99-12345678

8. You can also select individual donors and view their Donation Letters and save it to PDF in their folder.

Classes



Classes (16 Records)

Add a new record

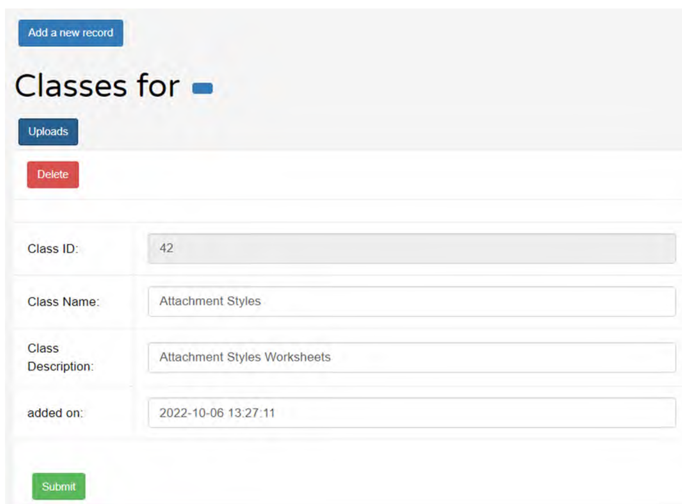
PDF XLS Print

Show 50 entries

Search:

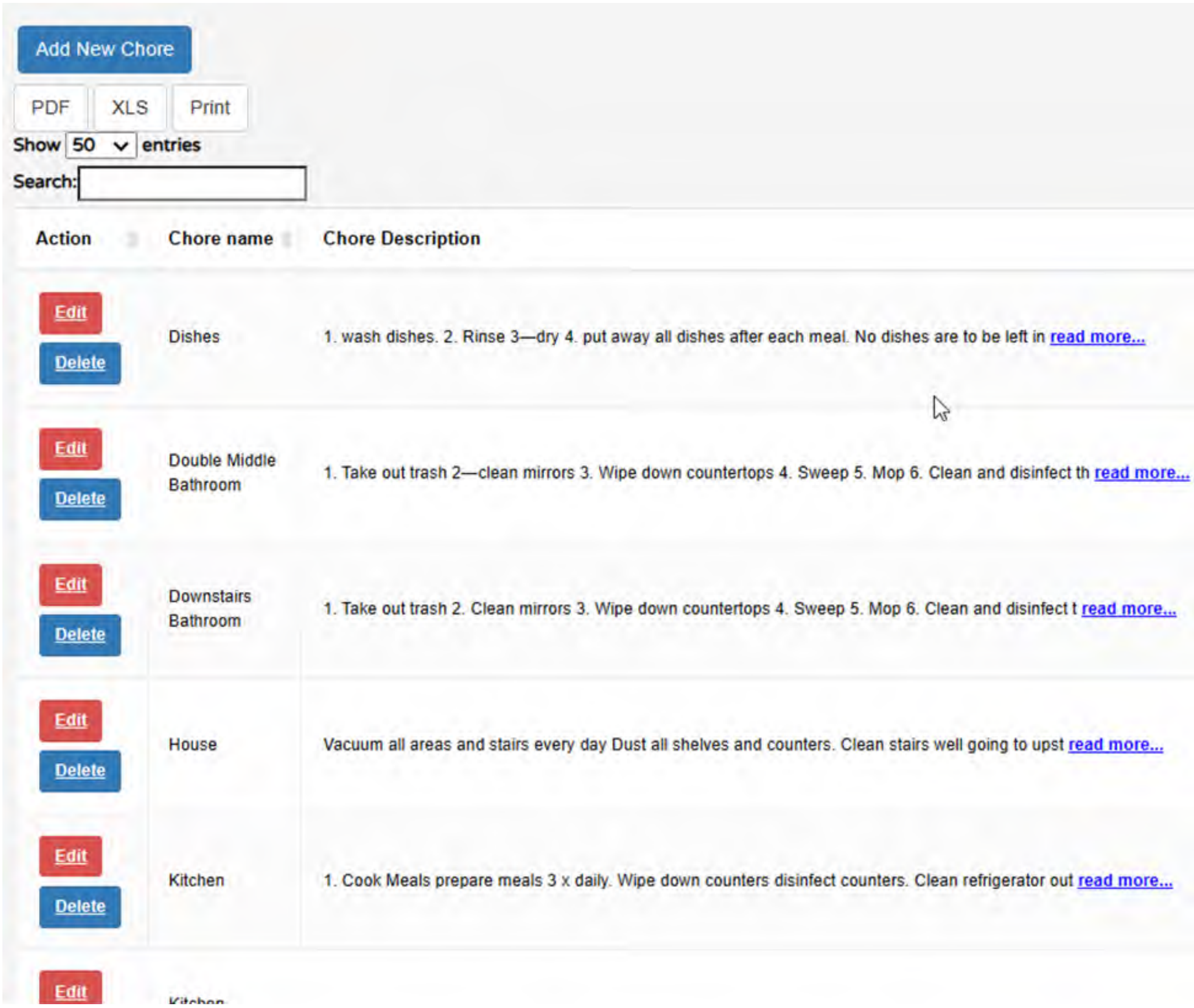
Class ID	Class Name	Class Description	added on
16	Emotion Wheel - Feeling Wheel	Emotion Wheel - Feeling Wheel	2022-06-04 12:01:56
15	Issue-Emotion-Mapping Worksheet	Emotion Mapping Worksheet	2022-05-04 15:28:37
14	Nicotine	Nicotine	2022-05-03 15:33:08
13	HIV	HIV	2022-05-03 15:05:43

View, search, export, print classes.

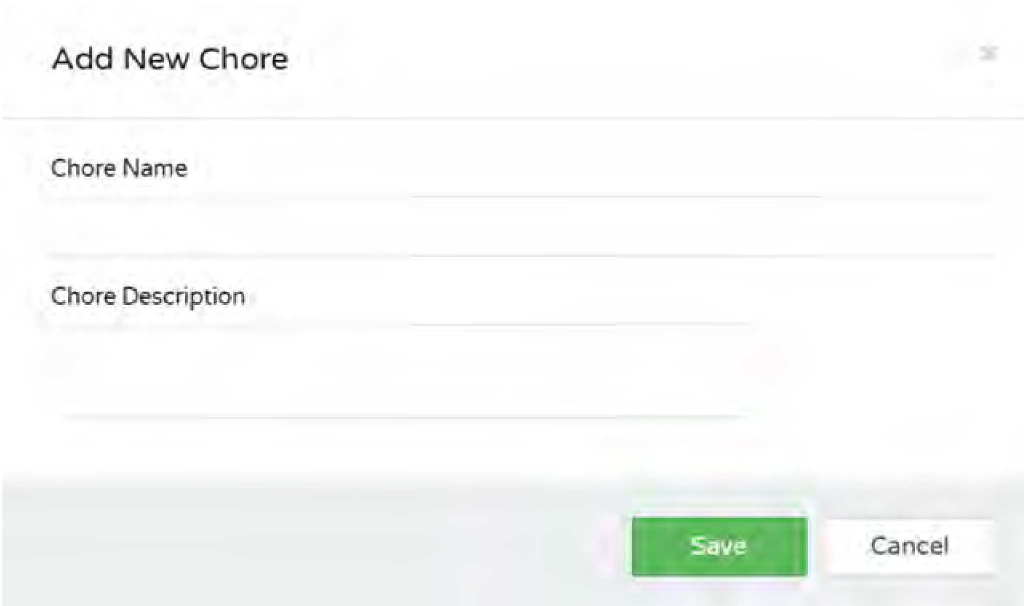


Add a class. Upload the curricula.

Edit Chore Names

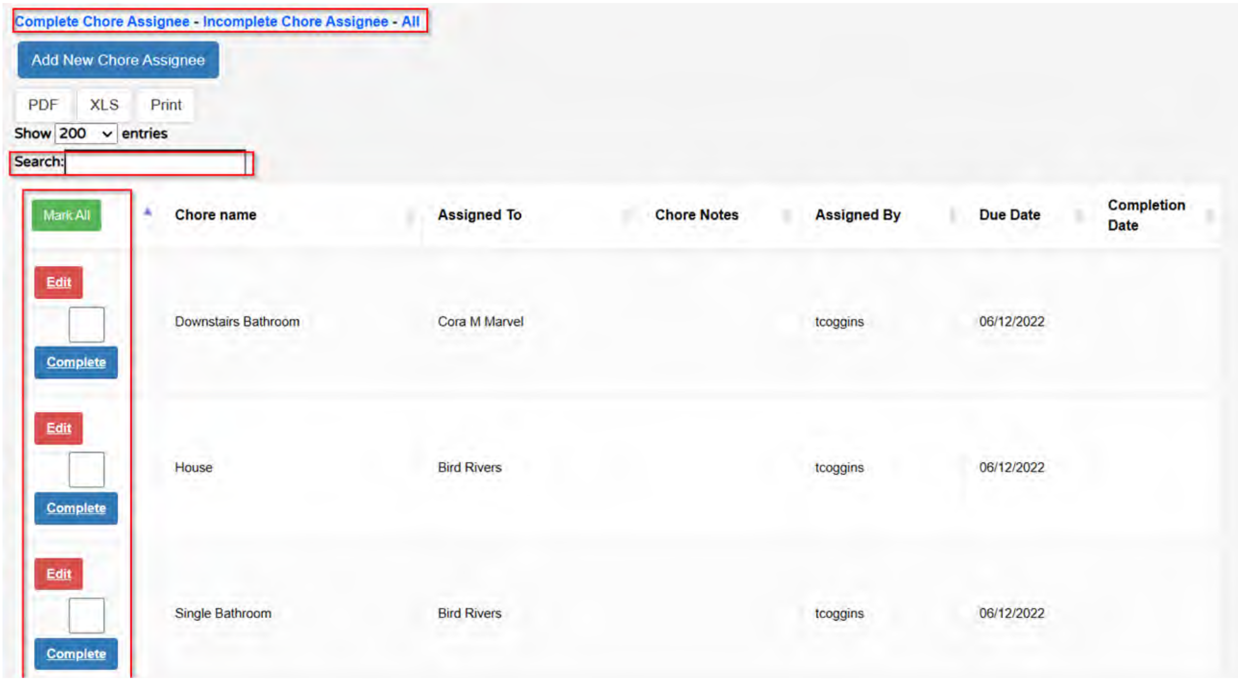


Edit, delete, search for, export, print and add chores.



Add a Chore Name and Description. Press Save.

To see a list of Assigned Chores, go to the Dashboard and click All Chores Assigned.



Complete Chore Assignee - Incomplete Chore Assignee - All

Add New Chore Assignee

PDF XLS Print

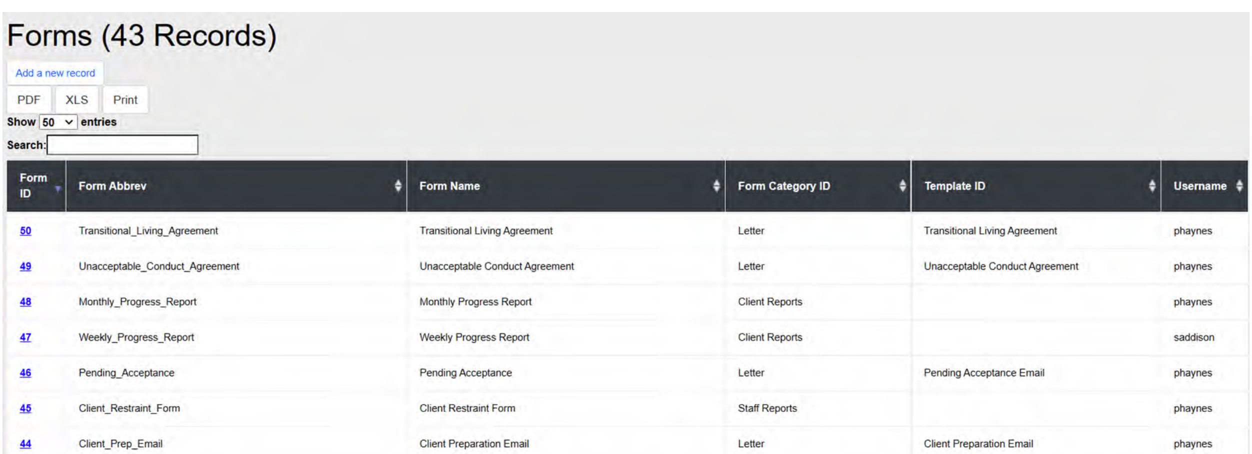
Show 200 entries

Search:

Mark All	Chore name	Assigned To	Chore Notes	Assigned By	Due Date	Completion Date
Edit Complete	Downstairs Bathroom	Cora M Marvel		tcoggins	06/12/2022	
Edit Complete	House	Bird Rivers		tcoggins	06/12/2022	
Edit Complete	Single Bathroom	Bird Rivers		tcoggins	06/12/2022	

From here, you can Edit or Mark them complete individually, or select all or some chores to delete them at the bottom of the page.

Forms



Forms (43 Records)

Add a new record

PDF XLS Print

Show 50 entries

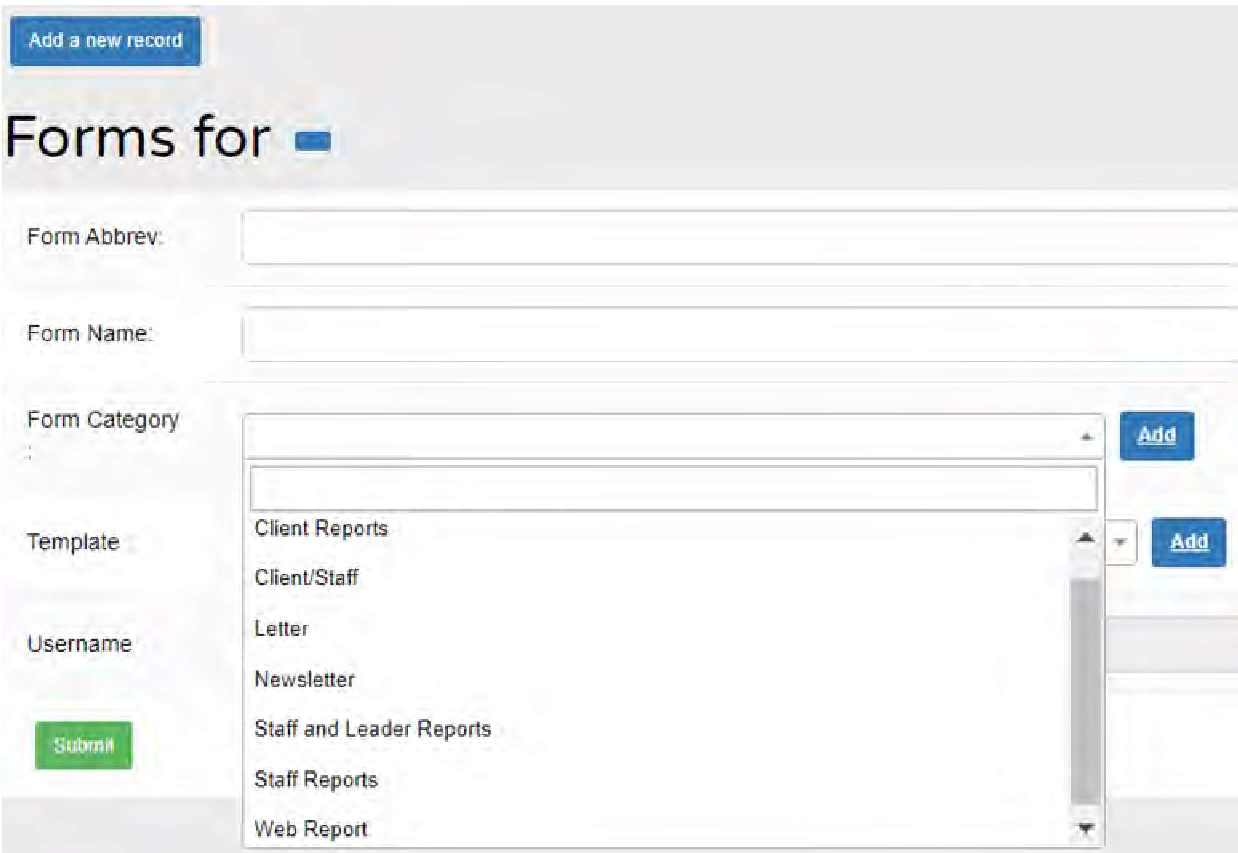
Search:

Form ID	Form Abbrev	Form Name	Form Category ID	Template ID	Username
50	Transitional_Living_Agreement	Transitional Living Agreement	Letter	Transitional Living Agreement	phaynes
49	Unacceptable_Conduct_Agreement	Unacceptable Conduct Agreement	Letter	Unacceptable Conduct Agreement	phaynes
48	Monthly_Progress_Report	Monthly Progress Report	Client Reports		phaynes
47	Weekly_Progress_Report	Weekly Progress Report	Client Reports		saddison
46	Pending_Acceptance	Pending Acceptance	Letter	Pending Acceptance Email	phaynes
45	Client_Restraint_Form	Client Restraint Form	Staff Reports		phaynes
44	Client_Prep_Email	Client Preparation Email	Letter	Client Preparation Email	phaynes

View, edit, search, export or print a list of all of the Forms that create Reports. You can create unlimited custom forms/reports.

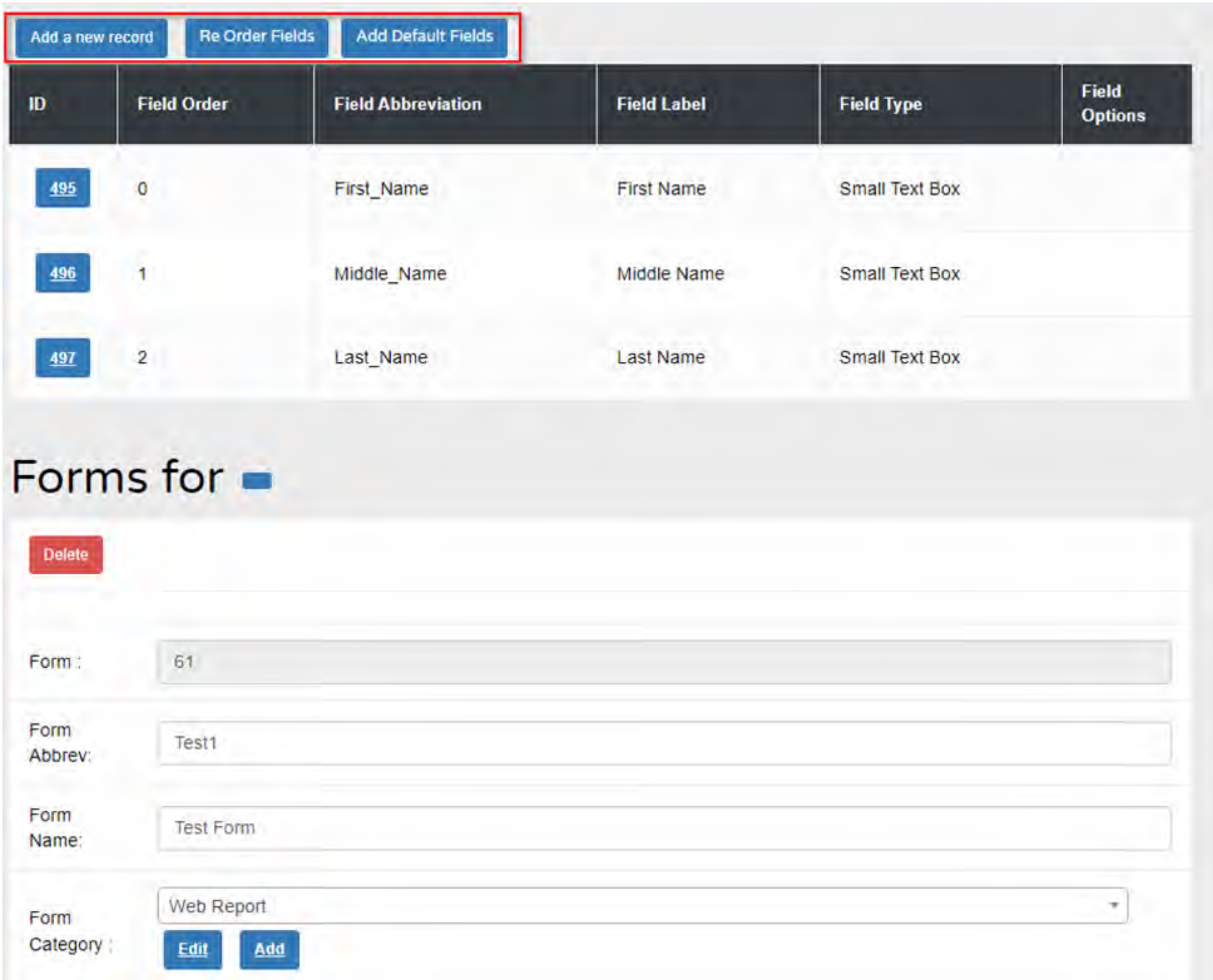
You can assign them to be Staff reports, or Client Reports (accessible on the Client dashboard), or Web Reports accessible to the public on a web page – listing of Web Report links are located in the Admin Dashboard).

First you add the basic information about a Form/Report.

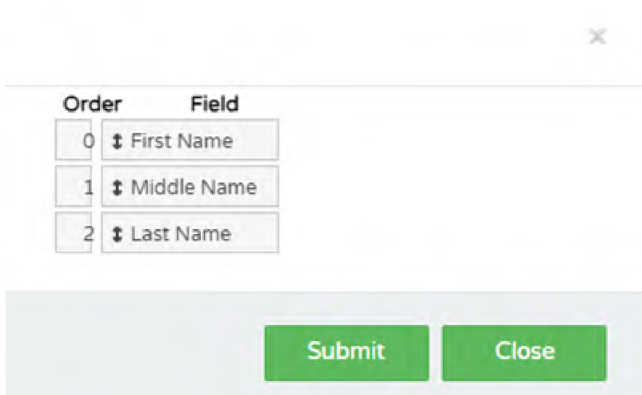


If you are using a Template on this form, select the name of the Template. You should normally start by creating a Template (see Template section) and then creating a Form and selecting that Template.

Once you press Submit, you will see the Fields area.



It begins with 3 default name fields. Then you create each of the individual fields. You can change the field order by clicking Re Order Fields.



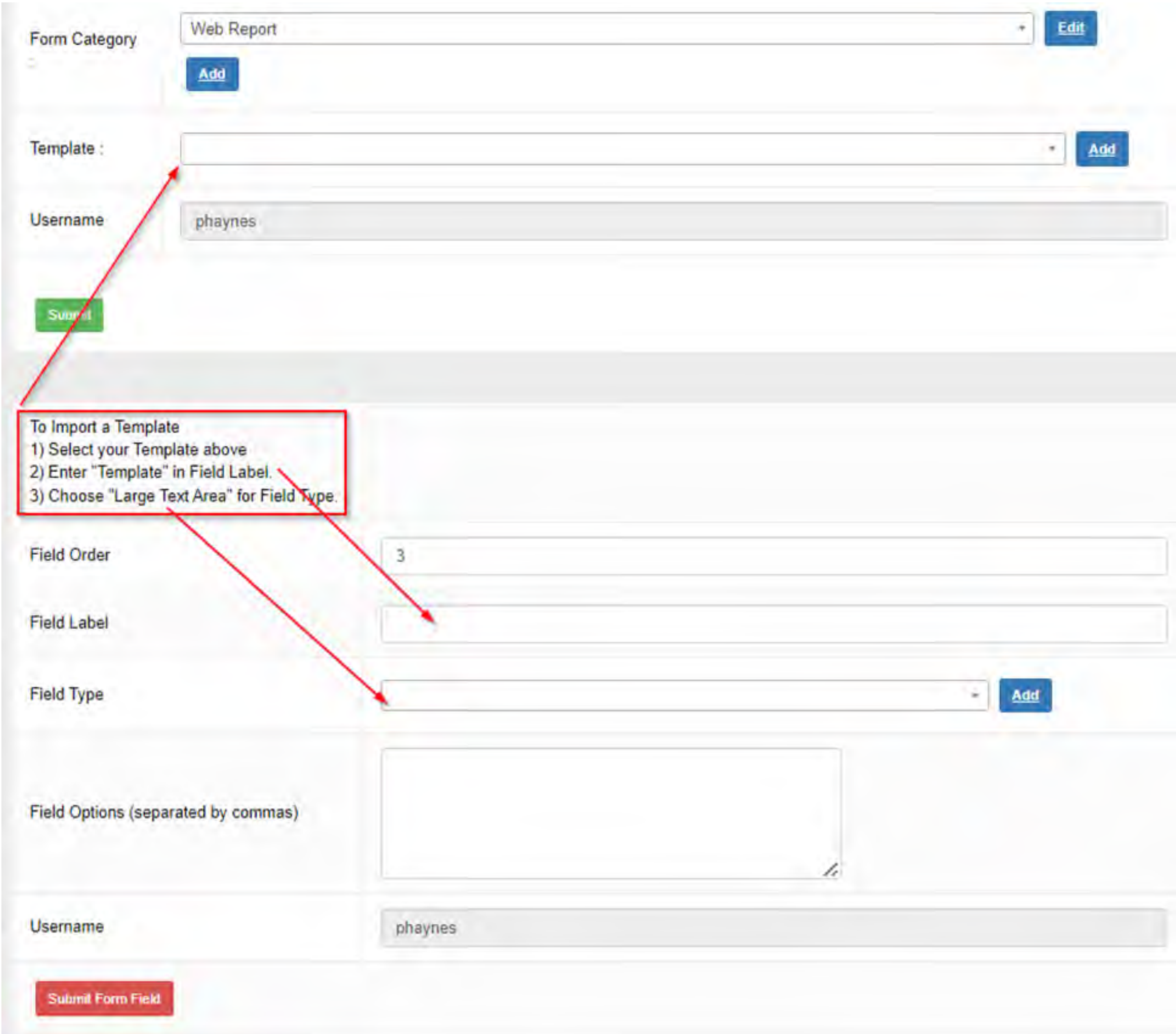
Drag the Fields to the correct order.

ID	Field Order	Field Abbreviation	Field Label	Field Type	Field Options
304	0	Resident	Resident	Small Text Box	
305	1	Month_and_Year	Month and Year	Small Text Box	
306	2	Resident_Phone_or_Cell_or_Email	Resident Phone or Cell or Email	Multi Select	Phone,Cell,Email
307	3	Resident_Phone_or_Cell_or_Email_Information	Resident Phone or Cell or Email Information	Small Text Box	
308	4	Staff_Phone_and_or_email	Staff Phone and /or email	Large Text Area	
309	5	Supervising_Officer_Name:	Supervising Officer Name:	Small Text Box	
310	6	Supervising_Officer_Email:	Supervising Officer Email:	Small Text Box	
311	7	I_do_or_do_not_plan_to_go_on_any_passes_this_month	I do or do not plan to go on any passes this month	Multi Select	Do, Do Not

Add a name for the field, a field type, and even field options.

The fields will be automatically numbered.

To add a Template, follow the instructions on the screen:

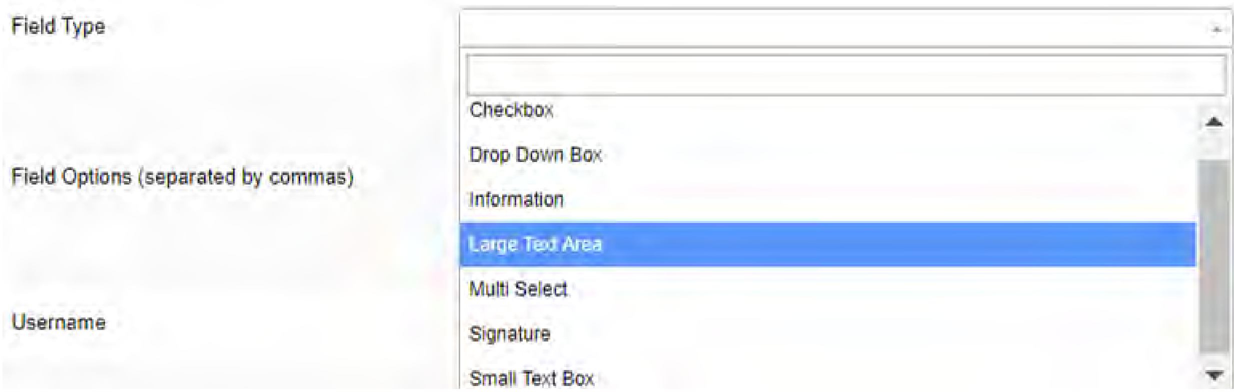


Make sure the Template has been created and is selected in the Form.

In the Field Label, enter the word Template.

Then select Large Text Area for the Field Type.

These are your Field Type Choices:



Checkbox – The User can check one or multiple boxes. (The choices will be entered in the Field Options field, separated by commas.)

Drop Down Box – The User can select 1 option from a Drop Down Box. (The choices will be entered in the Field Options field, separated by commas.)

Information – You can enter text here for instructions, or verbiage to which your User will be required to agree or respond. This is helpful when creating an Application.

Large Text Area – This provides a large area for the User to type long answers.

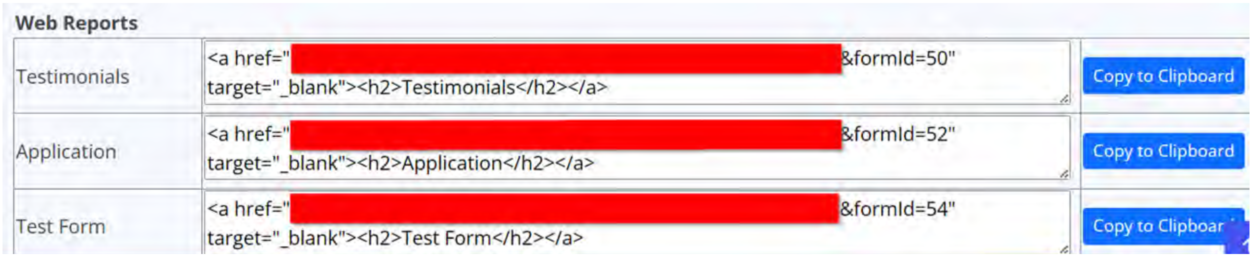
Multi Select – This allows the User to select multiple choices. (The choices will be entered in the Field Options field, separated by commas.)

Signature – You can add as many signature boxes as you like for signatures or initials. This is handy for Intake documentation. The client can sign their name with a mouse on a computer, or with their finger or a stylus on a phone, laptop or tablet.

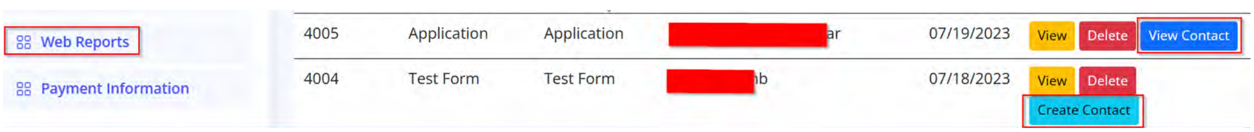
Small Text Box – This is a smaller box for smaller answers, like a name, phone or email address.

To test your Form, go to Add Report and select this form from drop down box.

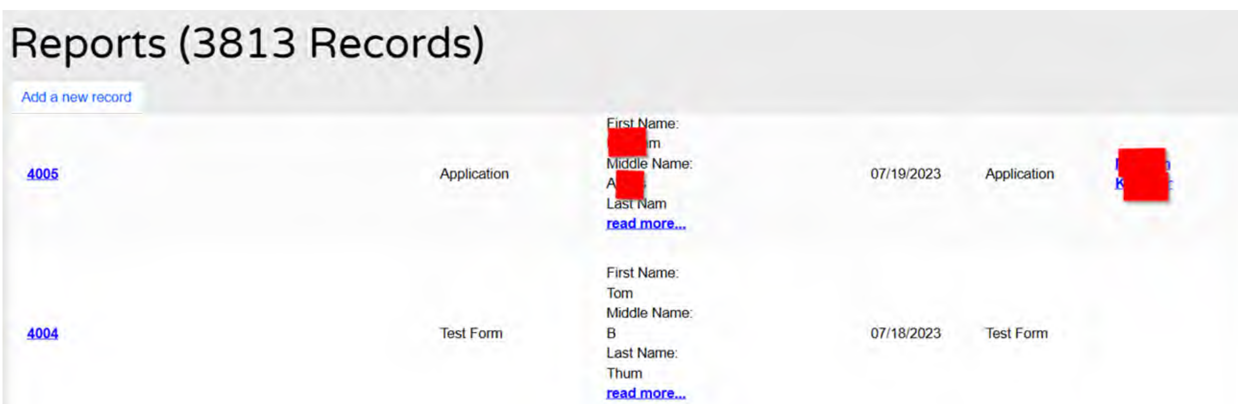
For a Web Form, once you have perfected it, the link to all Web Forms are listed on the Admin Dashboard, toward the bottom of the page.



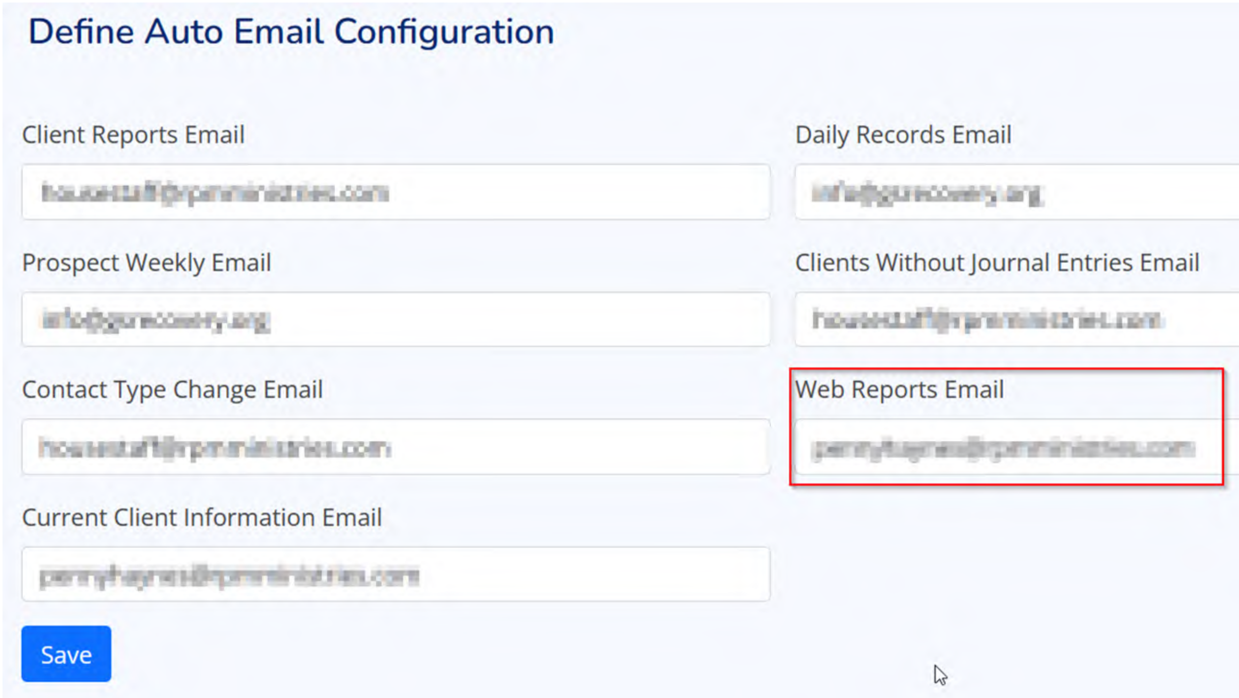
To see the saved RESPONSES to the Web Forms, go to the Admin Dashboard and click on Web Reports, where you can Add the User to your Contacts or View the Contact if already created.



You can also view the results in the Reports table, even if no Contact has been created.



You will receive an email with the results of each submitted Web Report to whichever email you choose.



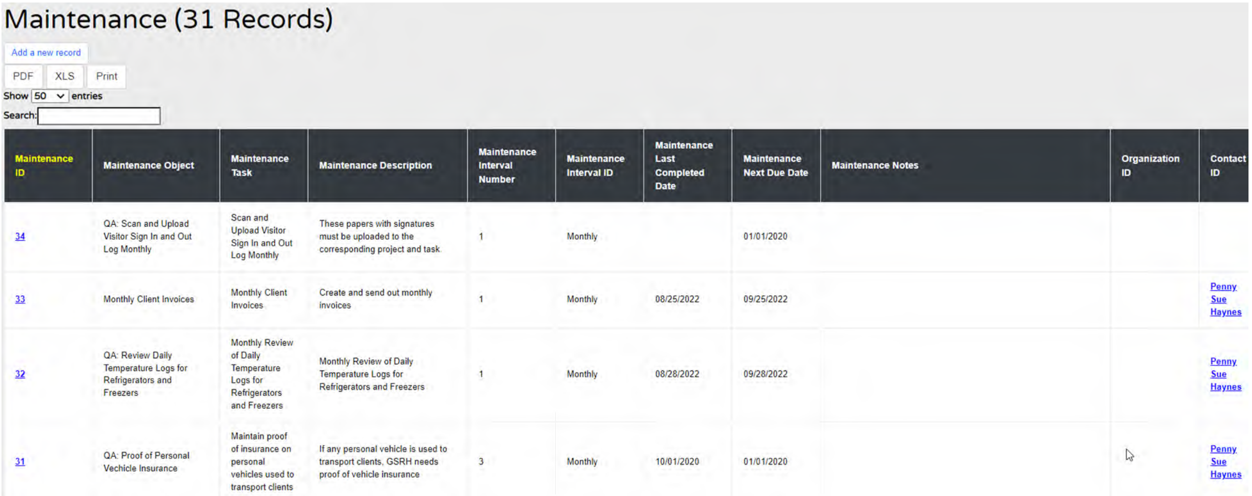
Incomplete Projects

Filtered to show only incomplete Projects.

Incomplete Tasks

Filtered to show only incomplete Tasks.

Maintenance



Maintenance (31 Records)

Add a new record

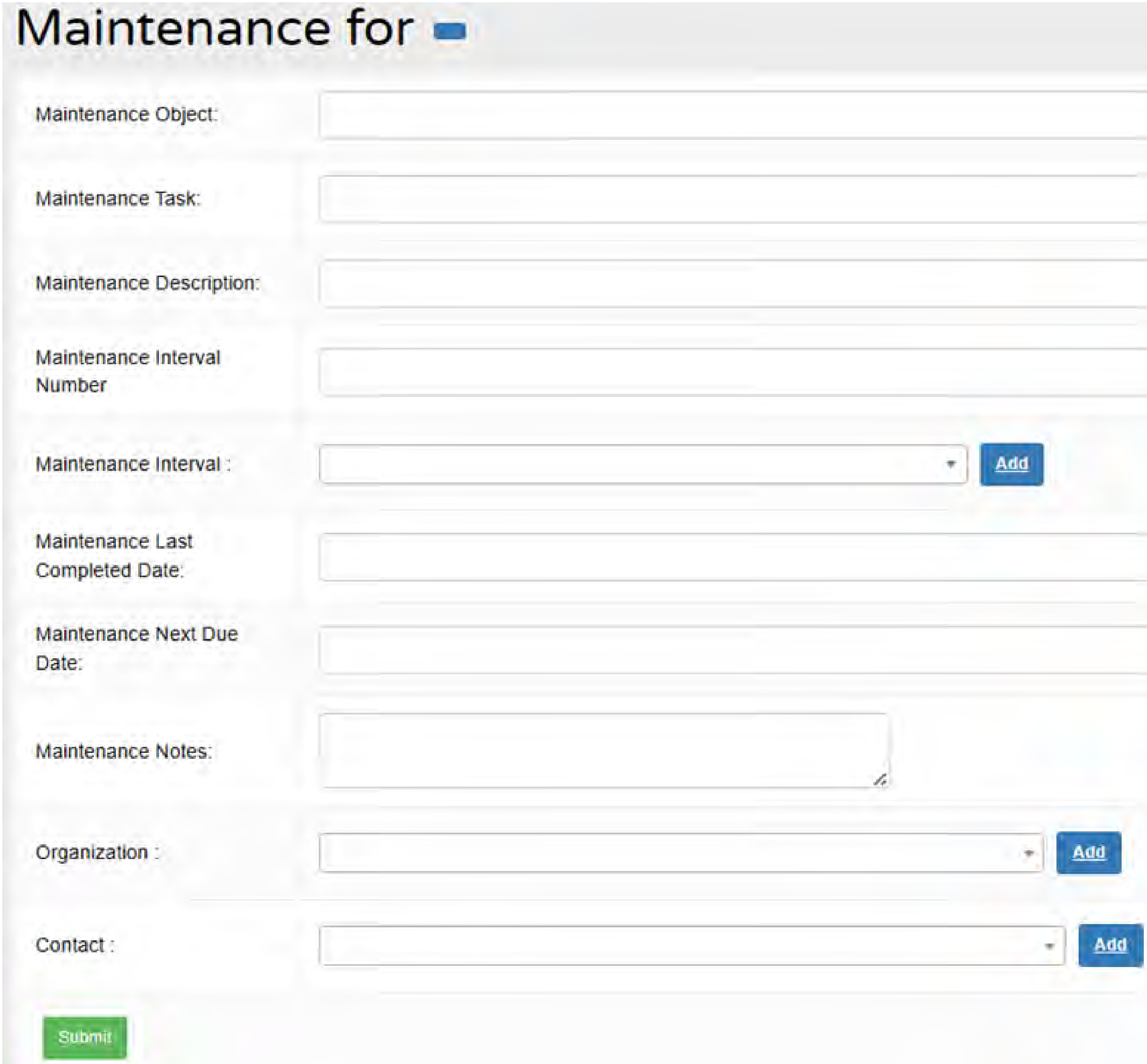
PDF XLS Print

Show 50 entries

Search:

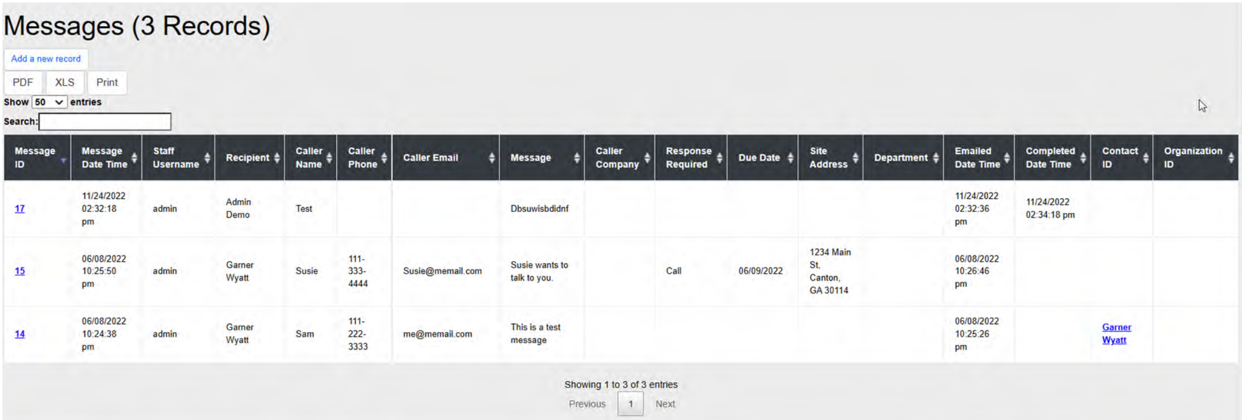
Maintenance ID	Maintenance Object	Maintenance Task	Maintenance Description	Maintenance Interval Number	Maintenance Interval ID	Maintenance Last Completed Date	Maintenance Next Due Date	Maintenance Notes	Organization ID	Contact ID
34	QA: Scan and Upload Visitor Sign In and Out Log Monthly	Scan and Upload Visitor Sign In and Out Log Monthly	These papers with signatures must be uploaded to the corresponding project and task	1	Monthly		01/01/2020			
33	Monthly Client Invoices	Monthly Client Invoices	Create and send out monthly invoices	1	Monthly	08/25/2022	09/25/2022			Penny Sue Haynes
32	QA: Review Daily Temperature Logs for Refrigerators and Freezers	Monthly Review of Daily Temperature Logs for Refrigerators and Freezers	Monthly Review of Daily Temperature Logs for Refrigerators and Freezers	1	Monthly	08/28/2022	09/28/2022			Penny Sue Haynes
31	QA: Proof of Personal Vechicle Insurance	Maintain proof of insurance on personal vehicles used to transport clients	If any personal vehicle is used to transport clients, GSRH needs proof of vehicle insurance	3	Monthly	10/01/2020	01/01/2020			Penny Sue Haynes

Maintenance is a separate area where you can track annual, quarterly or monthly projects so they will show on the Dashboard calendar as red items.



You enter the last time it was done, and then the next time it is due, and what the interval is supposed to be. When it is completed, you can change the Last Completed Date, and create a new Next Due Date.

Messages



Messages (3 Records)

Add a new record

PDF XLS Print

Show 50 entries

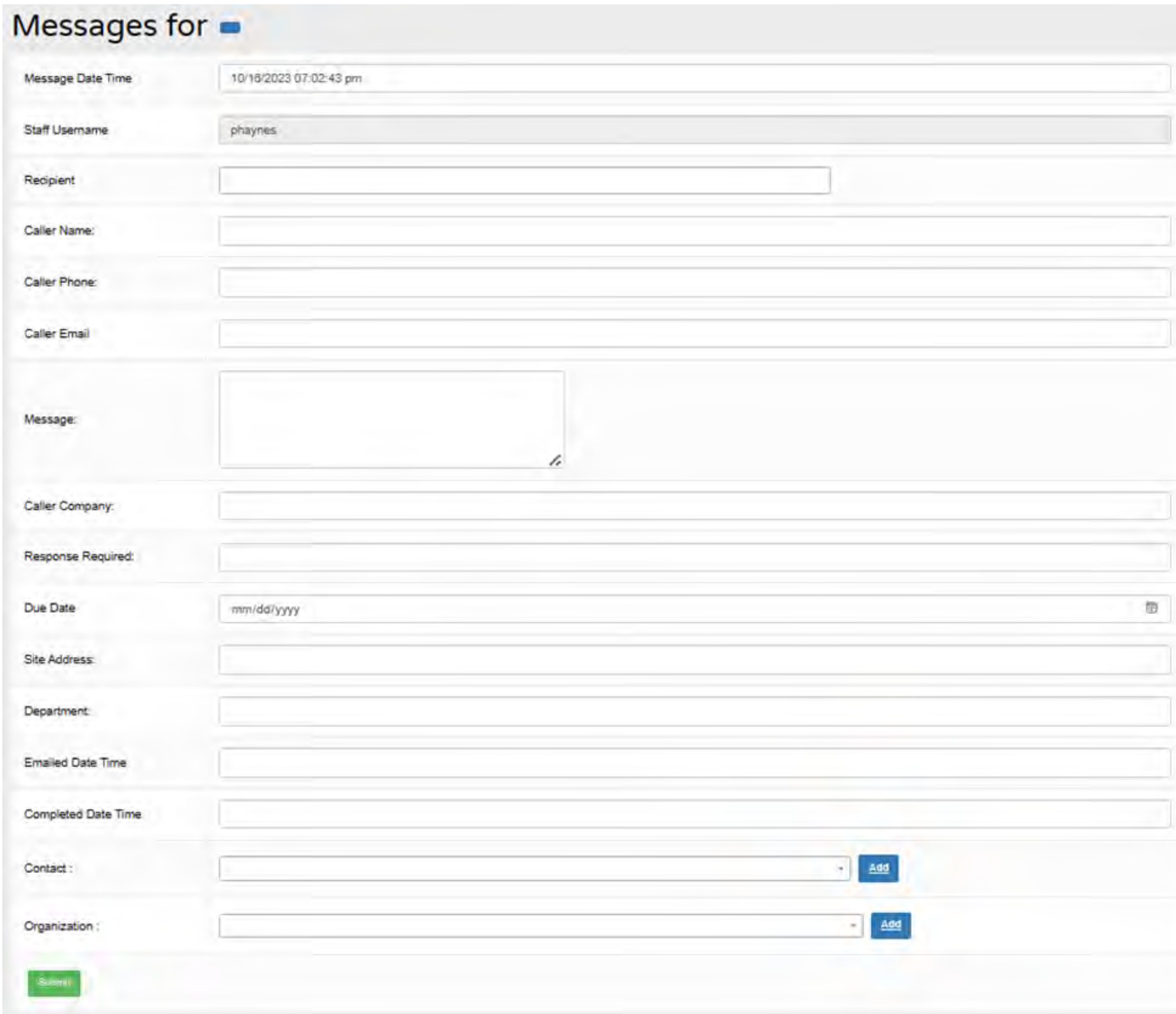
Search:

Message ID	Message Date Time	Staff Username	Recipient	Caller Name	Caller Phone	Caller Email	Message	Caller Company	Response Required	Due Date	Site Address	Department	Emailed Date Time	Completed Date Time	Contact ID	Organization ID
17	11/24/2022 02:32:18 pm	admin	Admin Demo	Test			Dbsuwisbdidnf						11/24/2022 02:32:36 pm	11/24/2022 02:34:18 pm		
15	06/08/2022 10:25:50 pm	admin	Garner Wyatt	Susie	111-333-4444	Susie@memail.com	Susie wants to talk to you.		Call	06/09/2022	1234 Main St, Canton, GA 30114		06/08/2022 10:26:46 pm			
14	06/08/2022 10:24:38 pm	admin	Garner Wyatt	Sam	111-222-3333	me@memail.com	This is a test message						06/08/2022 10:25:26 pm		Garner Wyatt	

Showing 1 to 3 of 3 entries

Previous 1 Next

Shows a table view of all messages sent between staff.

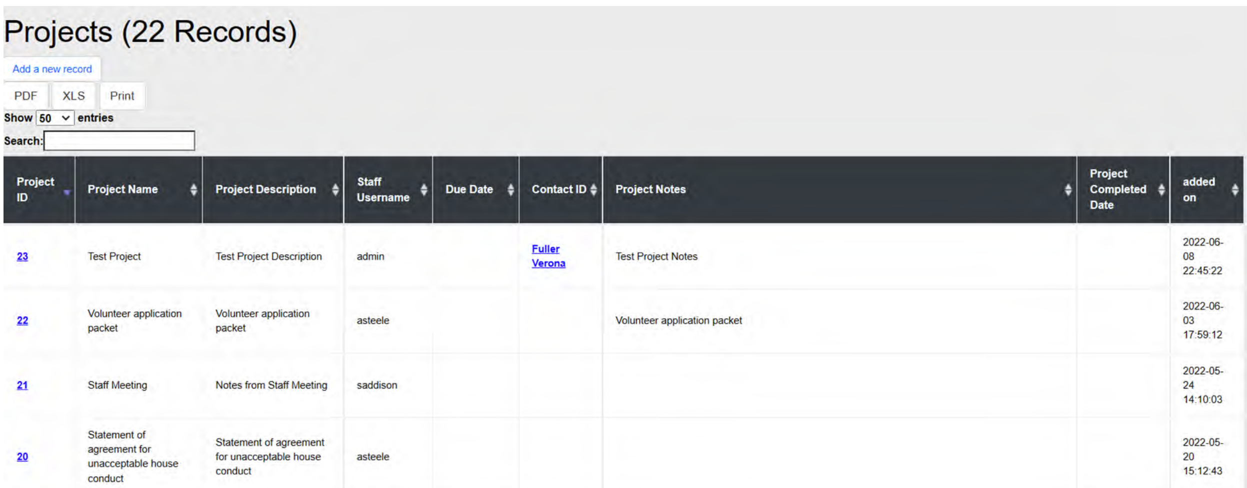


Add a Message. Required fields are Recipient, Caller Name and Message.

My Tasks

Tasks Table filtered to show only the Tasks for the current user.

Projects



Projects (22 Records)

Add a new record

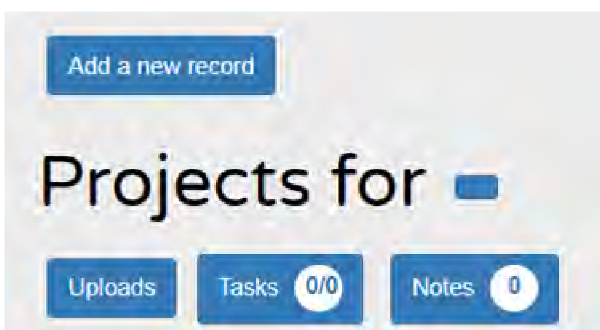
PDF XLS Print

Show 50 entries

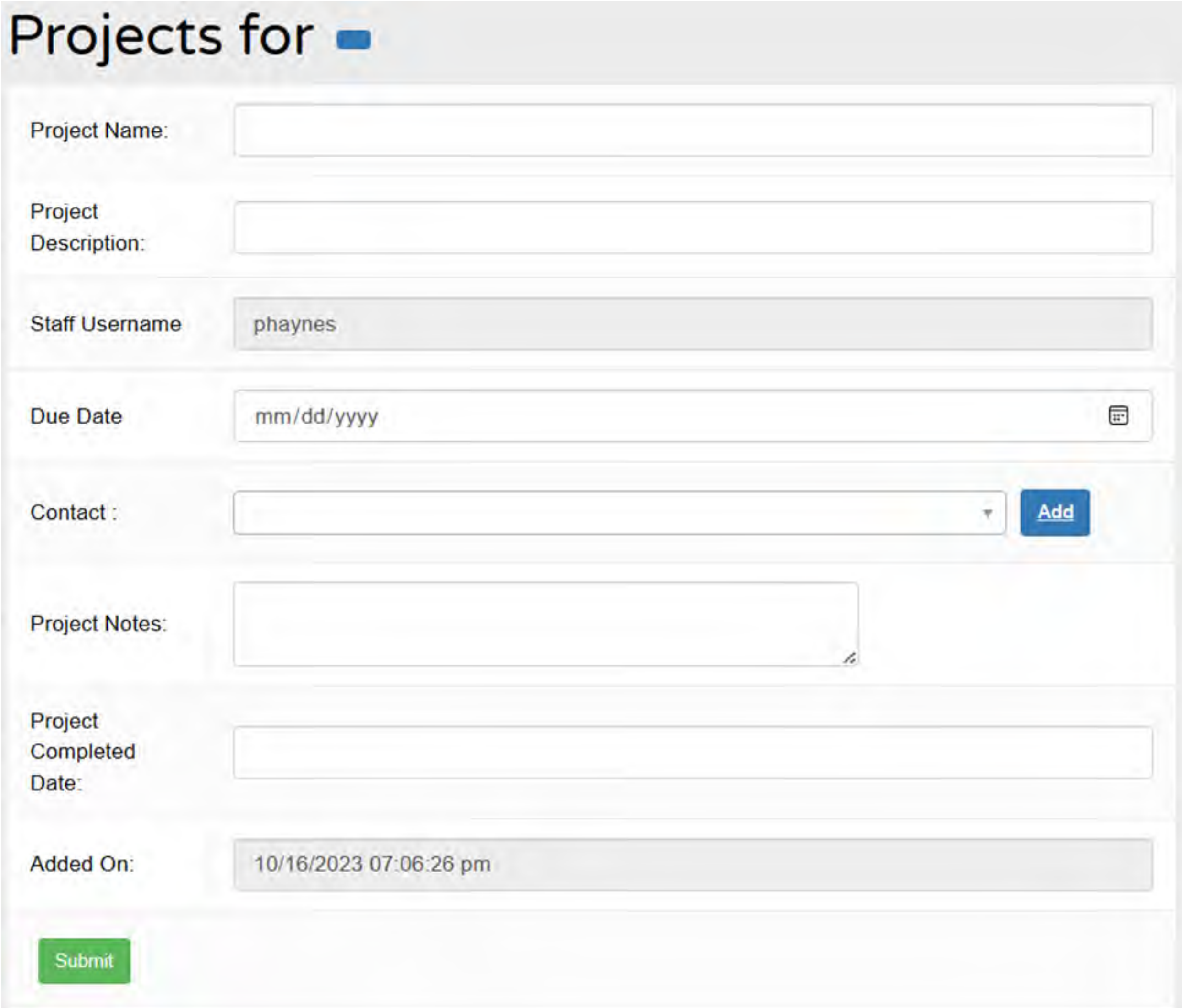
Search:

Project ID	Project Name	Project Description	Staff Username	Due Date	Contact ID	Project Notes	Project Completed Date	added on
23	Test Project	Test Project Description	admin		Fuller Verona	Test Project Notes		2022-06-08 22:45:22
22	Volunteer application packet	Volunteer application packet	asteele			Volunteer application packet		2022-06-03 17:59:12
21	Staff Meeting	Notes from Staff Meeting	saddison					2022-05-24 14:10:03
20	Statement of agreement for unacceptable house conduct	Statement of agreement for unacceptable house conduct	asteele					2022-05-20 15:12:43

View, sort, search, export, print all Projects.



Projects can have Uploads, tasks assigned to them (with their own Uploads), and Notes connected to Projects.



Add Projects. They can be assigned to someone and be marked complete.

Recent Progress Notes

Client	Problem, Goal, Objective	Progress Note	Created Date	Action
[illegible]	Problem: Client has not been able to remain sober Goal: Client will remain sober and pursue recovery. Objective: Client will complete HIV curriculum, have it reviewed by Staff for completion, and update Treatment Plan Notes with what he learned, as well as journal about each lesson.	I COMPLETED MY HIV HAND OUT	12-29-2022	Details Delete
[illegible]	Problem: Client has not been able to remain sober Goal: Client will achieve and maintain sobriety Objective: Client will complete HIV curriculum, have it reviewed by Staff for completion, and update Treatment Plan Notes with what he learned, as well as journal about each lesson.	Kratom Two compounds are found in Kratom leaves which are mitragynine and 7-a-hydroxymitragynine. They interact with opioid receptors in the brain, producing sedation, pleasure, and decreased pain, especially when users take it in large amounts. It can also lead to erectile dysfunction in men. HIV Stands for human immunodeficiency virus. It can only be spread through people, not by animals, insects, or plants. HIV is a virus that invades and destroys the cells of the immune system. Smoking Smoking cessation products are sold over the counter and by prescription. They should usually be used for a short amount of time to help with the symptoms from nicotine withdrawal. Quitting smoking can also cause an increased appetite. Smoking is very harmful to the body and can stunt your growth.	12-29-2022	Details Delete
[illegible]	Problem: Client has not been able to remain sober Goal: Client will achieve and maintain sobriety Objective: Client will complete HIV curriculum, have it reviewed by Staff for completion, and update Treatment Plan Notes with what he learned, as well as journal about each lesson.	HIV	12-29-2022	Details Delete
[illegible]	Problem: The client has not maintained a healthy lifestyle. Goal: The client will maintain a healthy lifestyle through eating and exercise. Objective: The client will work out 3 - 4 days per week.	I have yet to start working out but am working with my diet to maintain a healthy lifestyle	12-29-2022	Details Delete
[illegible]	Problem: Client is mandated to a Family Violence Class. Goal: Client will complete a Family Violence		12-29-	Details

Review the client Treatment Plan notes entered over the past 2 weeks.

Reports

Reports (6 Records)

Add a new record

PDF XLS Print

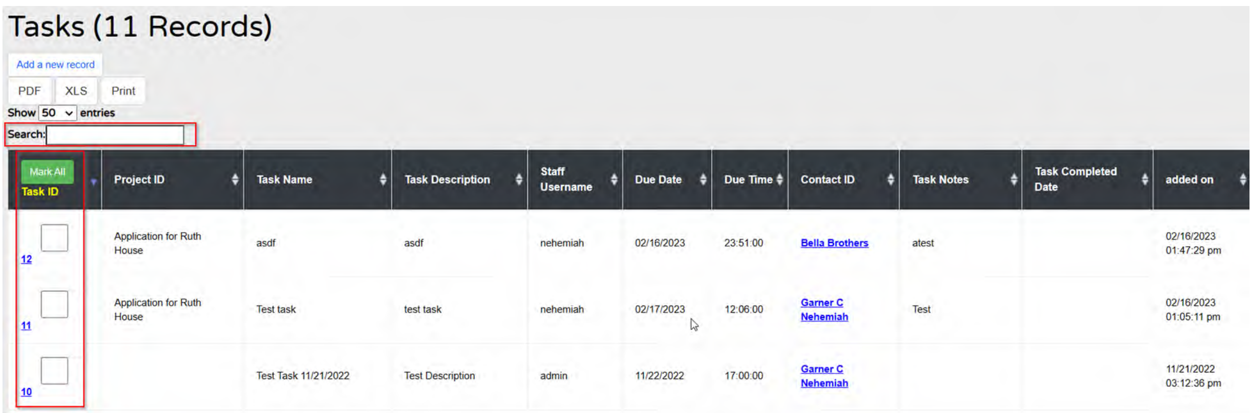
Show 50 entries

Search:

Report Id	Report Name	Details	Creator	Created On	Form	Contact	DOB	Intake Date	Discharge Date
6	Pass	Permission Received From Probation Officer: Yes Date of Report: 6/10/2022 Reporting Staff: Penny Haynes Requested Date(s) of Pass: 6/11/2022 Reason for Request: 12 hour pass with family Contact Name: Mia Farrow Contact Phone: 111-222-3333 Contact Email: mia@me.com Contact Address: 1234 Main St, Jasper, GA 30143 Notes: Authorized By & Date:	r114	06/10/2022	Overnight Pass Request	Garner Nehemiah	05/30/1984	10/22/2021	
5	Weekly Progress Report	Date: 6/10/2022 Week #: 3 Time: 12:00 pm Today I Am Feeling: Glad Because: I am getting up when I need to and getting things done and not getting in trouble. Extremely Productive, Enough To Get By, Very Unproductive: Extremely Productive My Assets/ Strengths: I am a good worker My Defects /Weakness: I like to take naps in the day How Did I Spend My Time: Cleaning, talking, laying oread more...	y521	06/10/2022	Weekly Progress Report	Susan Wyatt	05/28/1980	05/17/2022	
4	Pass	Permission Received From Probation Officer: Yes Date of Report: 6/10/2022 Reporting Staff: Requested Date(s) of Pass: 6/17/2022 Reason for Request: Overnight pass Contact Name: June Thomas (mother) Contact Phone: 888-999-9999 Contact Email: june.thomas@memail.com Contact Address: 12345 Main St, Canton, GA 30114 Notes:	s484	06/10/2022	Overnight Pass Request	Cora Marvel	06/21/1982	02/19/2022	

View all of the Reports in table view. Sort, search, save, print.

Tasks



Tasks (11 Records)

Add a new record

PDF XLS Print

Show 50 entries

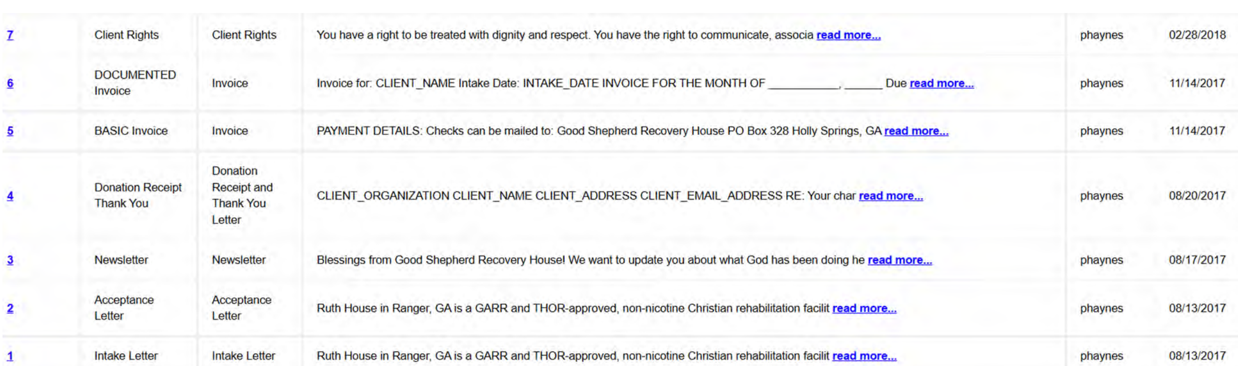
Search:

Mark All Task ID	Project ID	Task Name	Task Description	Staff Username	Due Date	Due Time	Contact ID	Task Notes	Task Completed Date	added on
12	Application for Ruth House	asdf	asdf	nehemiah	02/16/2023	23:51:00	Bella Brothers	atest		02/16/2023 01:47:29 pm
11	Application for Ruth House	Test task	test task	nehemiah	02/17/2023	12:06:00	Garner C Nehemiah	Test		02/16/2023 01:05:11 pm
10		Test Task 11/21/2022	Test Description	admin	11/22/2022	17:00:00	Garner C Nehemiah			11/21/2022 03:12:36 pm

View, sort, search, export, print all Tasks.

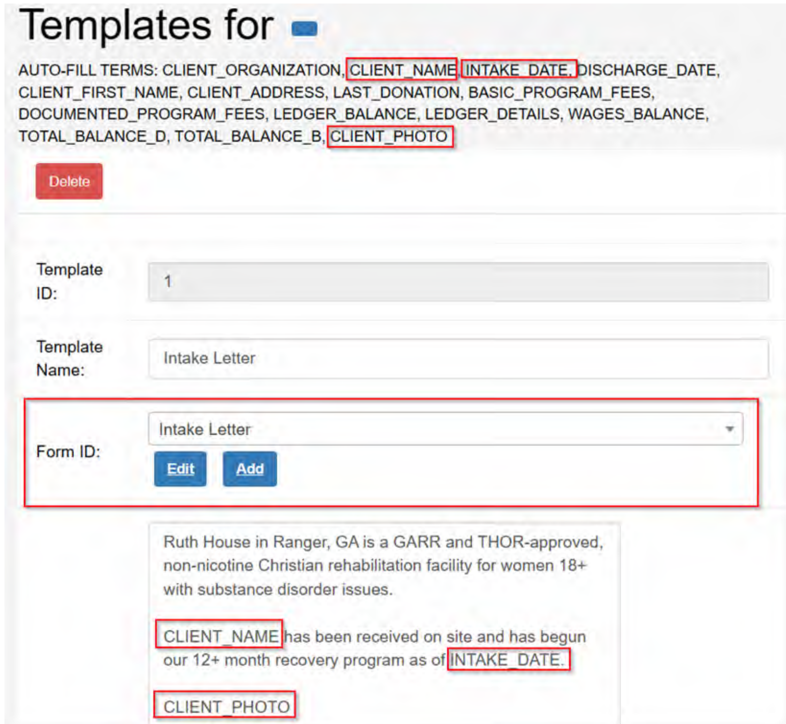
Select Tasks individually or Mark All and press Delete at the bottom of the page to Bulk Delete.

Templates

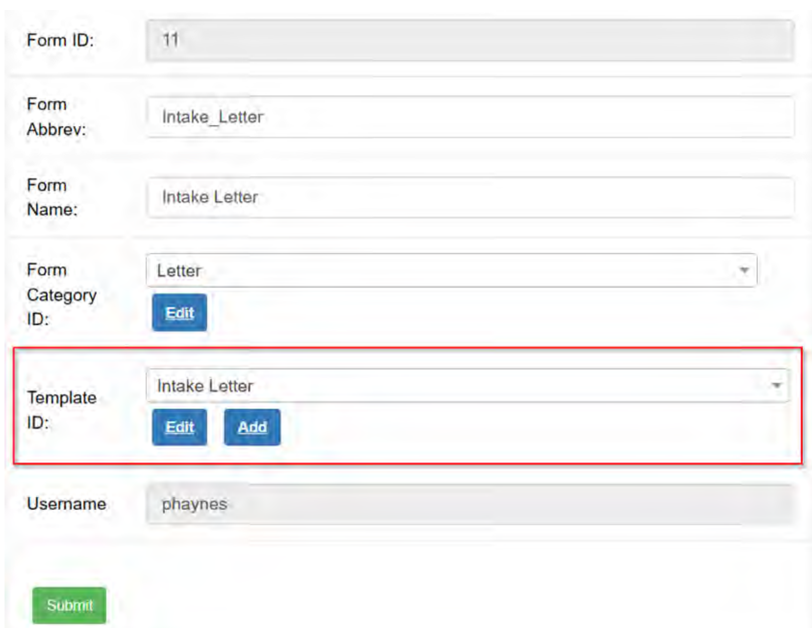


7	Client Rights	Client Rights	You have a right to be treated with dignity and respect. You have the right to communicate, associa read more...	phaynes	02/28/2018
6	DOCUMENTED Invoice	Invoice	Invoice for: CLIENT_NAME Intake Date: INTAKE_DATE INVOICE FOR THE MONTH OF __________, ______ Due read more...	phaynes	11/14/2017
5	BASIC Invoice	Invoice	PAYMENT DETAILS: Checks can be mailed to: Good Shepherd Recovery House PO Box 328 Holly Springs, GA read more...	phaynes	11/14/2017
4	Donation Receipt Thank You	Donation Receipt and Thank You Letter	CLIENT_ORGANIZATION CLIENT_NAME CLIENT_ADDRESS CLIENT_EMAIL_ADDRESS RE: Your char read more...	phaynes	08/20/2017
3	Newsletter	Newsletter	Blessings from Good Shepherd Recovery House! We want to update you about what God has been doing he read more...	phaynes	08/17/2017
2	Acceptance Letter	Acceptance Letter	Ruth House in Ranger, GA is a GARR and THOR-approved, non-nicotine Christian rehabilitation facilit read more...	phaynes	08/13/2017
1	Intake Letter	Intake Letter	Ruth House in Ranger, GA is a GARR and THOR-approved, non-nicotine Christian rehabilitation facilit read more...	phaynes	08/13/2017

You can view, edit, and create Templates such as an Acceptance Letter, Intake Letter, Graduation Letter.



Templates can also import information about the client for whom you are creating a report (such as Date of Birth, Name, Intake Date, etc.).



Templates must be connected to a form, and a form must be connected to a Template. Only 1 template per form can be used.

Add a new record

ID	Field Order	Field Abbreviation	Field Label	Field Type	Field Options
78	1	Date_of_Letter	Date of Letter	Small Text Box	
79	2	Recipient_First_And_Last_Name	Recipient First And Last Name	Small Text Box	
80	3	Template	Template	Large Text Area	
84	4	Staff_Signature_And_Title	Staff Signature and Title	Small Text Box	

Add to your Form a field named Template as a Large Text Area. When you press Submit on your Form, it will auto fill with the content of the Template.

Verify Chore

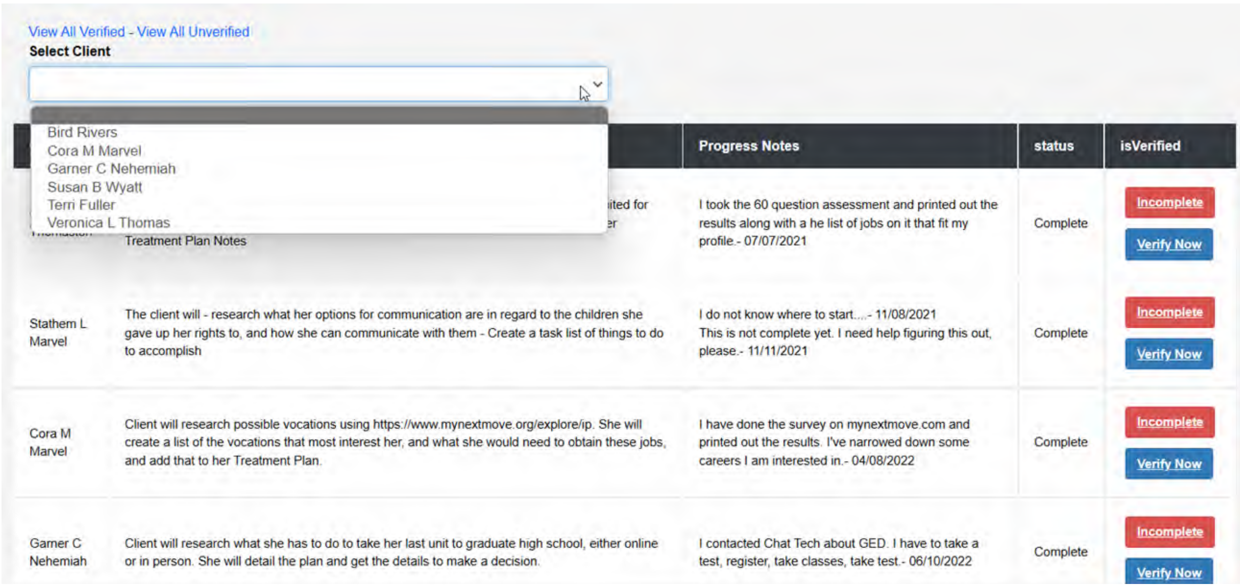
View All Verified - View All Unverified

Select Client

Client	Chore Name	Chore Description	Chore Notes	Due Date	Completed Date	status	isVerified
Terri Fuller	Laundry Room	1. Sweep 2. Mop 3. Dust and wipe down the washer and dryer. 4. take out the trash		06/06/2022	06/07/2022	Complete	Incomplete Verify Now
Terri Fuller	House	Vacuum all areas and stairs every day Dust all shelves and counters. Clean stairs well going to upstairs apartment dust walls on stairs. Dust and clean all light fixtures and ceiling fans pull all cushions off the couch vacuum out all couches and chairs. Clean all windows, water plants, take the trash out. Wash Dry Fold and put away all laundry! There should be no laundry left in the dryer or washer overnight! Clean dust and sweep the Library organize all areas in Library. Clean and disinfect all handrails. Sweep all stairs to the dining room also. Also, clean the loft area remove all kid's toys nothing in the loft area.		06/06/2022	06/07/2022	Complete	Incomplete Verify Now
Bird Rivers	House	Vacuum all areas and stairs every day Dust all shelves and counters. Clean stairs well going to upstairs apartment dust walls on stairs. Dust and clean all light fixtures and ceiling fans pull all cushions off the couch vacuum out all couches and chairs. Clean all windows, water plants, take the trash out. Wash Dry Fold and put away all laundry! There should be no laundry left in the dryer or washer overnight! Clean dust and sweep the Library organize all areas in Library. Clean and disinfect all handrails. Sweep all stairs to		06/06/2022	06/07/2022	Complete	Incomplete Verify Now

When clients mark their chores as completed from their dashboard, they are stored in this table until Staff verifies that the chores were completed, or Staff marks them incomplete. You can also filter by client.

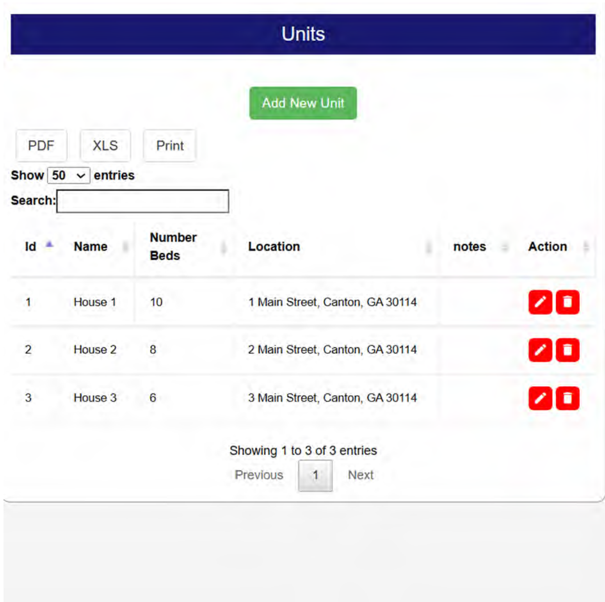
Verify Objective Completed



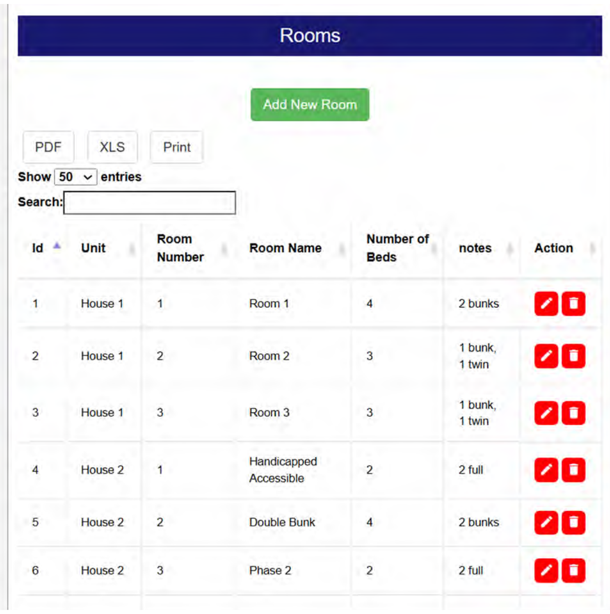
If a client has marked an Objective completed, you can review it to mark it Incomplete or Verify it.

This page will show you ALL Objectives completed, but you can filter it by client.

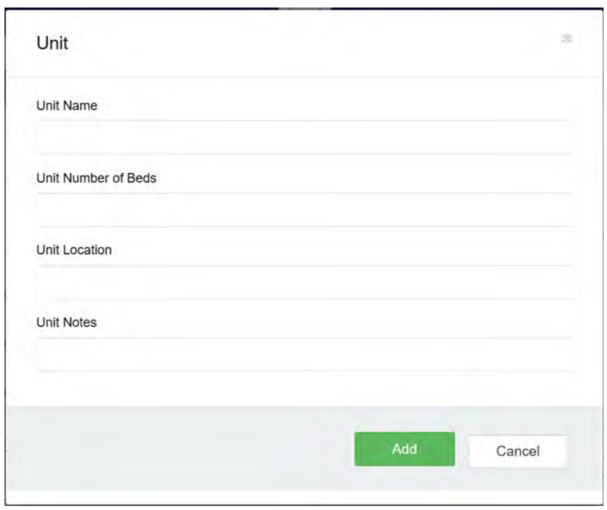
Units & Rooms

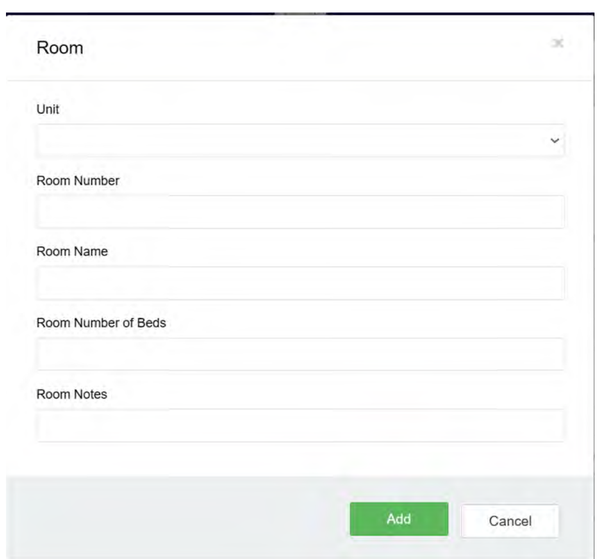


Id	Name	Number Beds	Location	notes	Action
1	House 1	10	1 Main Street, Canton, GA 30114		
2	House 2	8	2 Main Street, Canton, GA 30114		
3	House 3	6	3 Main Street, Canton, GA 30114		



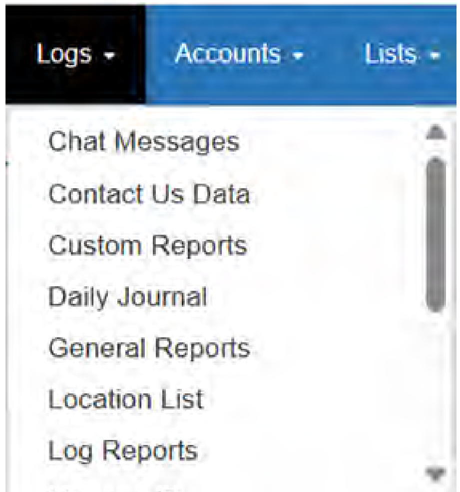
Id	Unit	Room Number	Room Name	Number of Beds	notes	Action
1	House 1	1	Room 1	4	2 bunks	
2	House 1	2	Room 2	3	1 bunk, 1 twin	
3	House 1	3	Room 3	3	1 bunk, 1 twin	
4	House 2	1	Handicapped Accessible	2	2 full	
5	House 2	2	Double Bunk	4	2 bunks	
6	House 2	3	Phase 2	2	2 full	



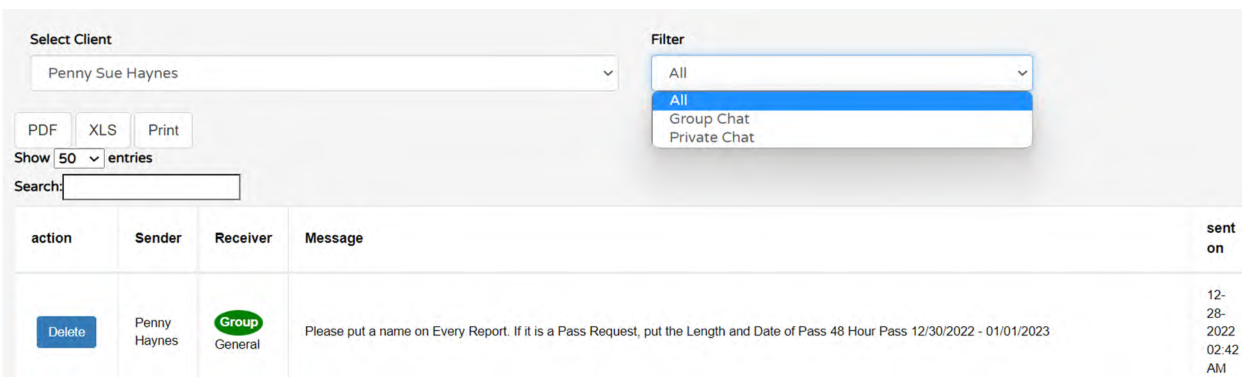


Add your location(s), and then your rooms and number of beds. Even if you have only 1 location, you need to enter it. If you have multiple locations, you can filter your Dashboard data by location to see only the location where you work or all locations.

LOGS



Chat Messages



Select a Contact, then select your filter and see all Chat messages, Group and Private.

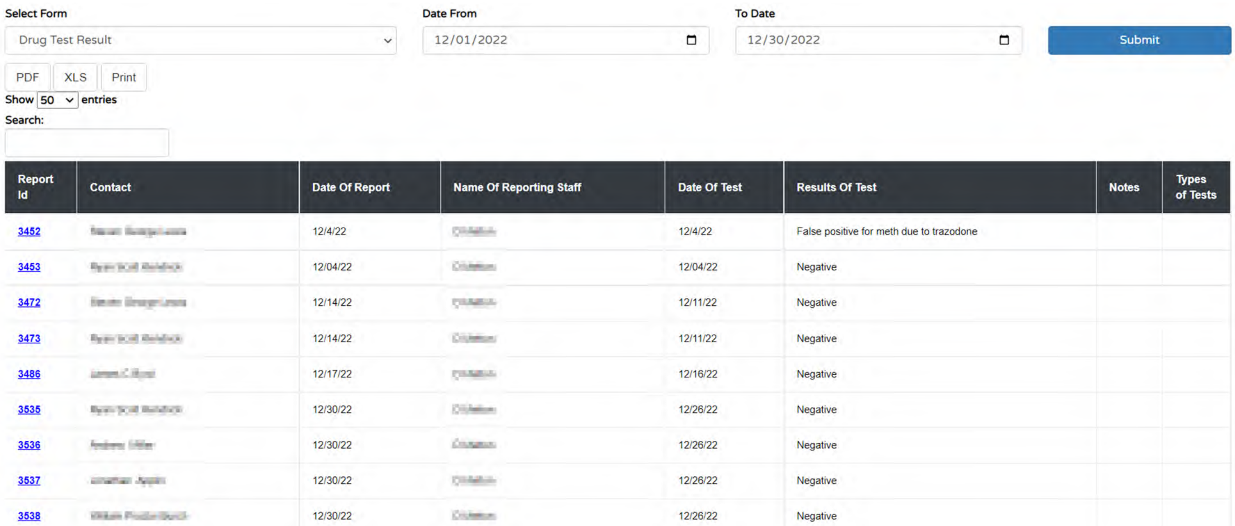
Contact Us Data

Contact Data

Client	Sponsor	Emergency Contact	Supervising Officer	Lawyer	Person Inquiring	Message	Other	Action
Fiona Bird 02/04/1989 Heroin Cherokee County, GA	Railey House 111-222-3333 me@me.com	Railey House 111-222-3333 me@me.com	Officer Walker 777-777-7777 ow@email.com		Railey House 111-222-3333 me@me.com	I would like to get some help for my sister who is in Cherokee County jail and needs a THOR approved program.	**Sent On:** 06/10/2022 12:38 pm **Source:** Thor Directory **Uploads:** i-love-lucy-shookt.gif	Mark Read Delete
Kristie Madden meth Bartow Co , GA	indigent indigent	n 5555555555	Sarah Parks 555-555-5555 sara@memail.com		Manley 444-444-4444 see@memail.com	Hello, Parole is requiring someone to complete a residential treatment program. She is indigent at this time. Please let me know how to get her into this program. Thank you	**Sent On:** 05/23/2022 03:38 pm **Source:** Thor Directory	Delete
Pam Waites 02/02/1958 Tramadol, but prescribed Fentanyl patches for	Joe Blow 2295602985 me@memail.com	Haley 444-555-6666 me@memail.com			Joseph 333-333-3333 hay@memail.com	I am searching for a program for my mother to treat her substance abuse, migraines, and mental health disorder(s). Would your program be a good fit for her? Also, do you accept Wellcare insurance. If not, do you have any information about other programs? Thank you for your time.	**Sent On:** 04/28/2022 12:24 pm **Source:** Friend	Delete

Anyone who completes our Contact Us form from your web site will have their data saved here. The Administrator should have already received an email when the Contact Us form was completed, but this is the permanent record of the data being saved to the database.

Custom Reports



Select Form: Drug Test Result | Date From: 12/01/2022 | To Date: 12/30/2022 | Submit

PDF | XLS | Print

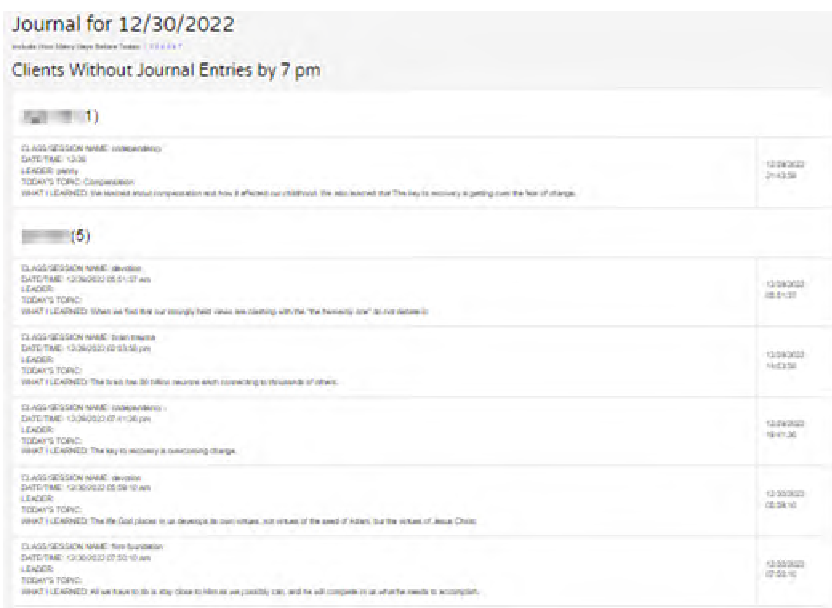
Show 50 entries

Search:

Report Id	Contact	Date Of Report	Name Of Reporting Staff	Date Of Test	Results Of Test	Notes	Types of Tests
3452	[illegible]	12/4/22	[illegible]	12/4/22	False positive for meth due to trazodone		
3453	[illegible]	12/04/22	[illegible]	12/04/22	Negative		
3472	[illegible]	12/14/22	[illegible]	12/11/22	Negative		
3473	[illegible]	12/14/22	[illegible]	12/11/22	Negative		
3486	[illegible]	12/17/22	[illegible]	12/16/22	Negative		
3535	[illegible]	12/30/22	[illegible]	12/26/22	Negative		
3536	[illegible]	12/30/22	[illegible]	12/26/22	Negative		
3537	[illegible]	12/30/22	[illegible]	12/26/22	Negative		
3538	[illegible]	12/30/22	[illegible]	12/26/22	Negative		

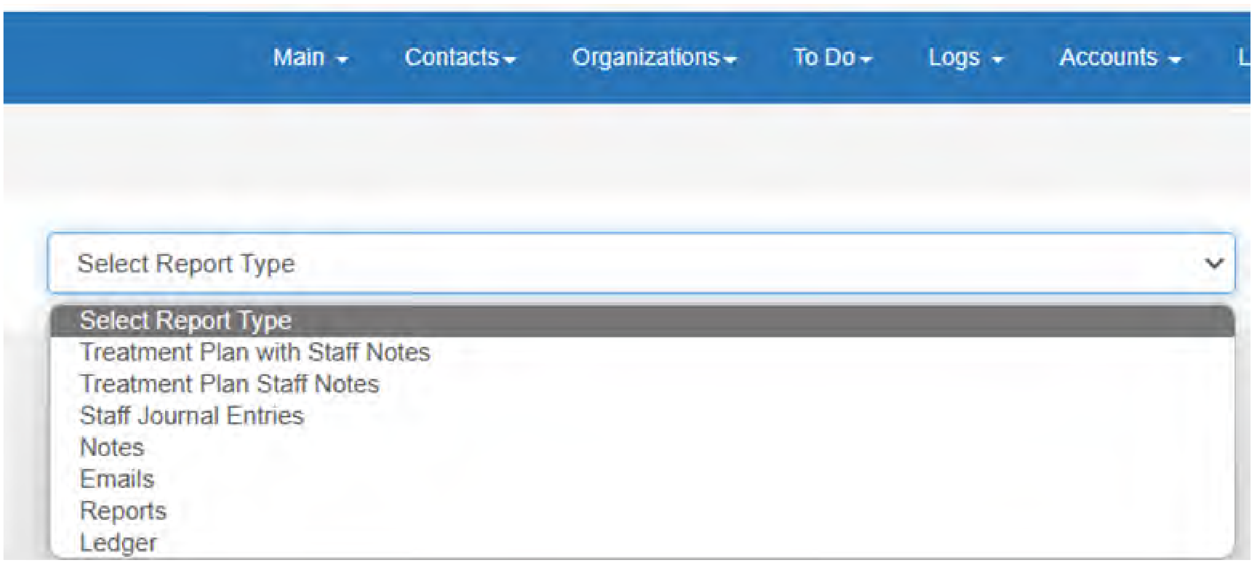
Select any of your Custom Reports and a date range and see the results. You can search, export, print results, as well as click to go to the record.

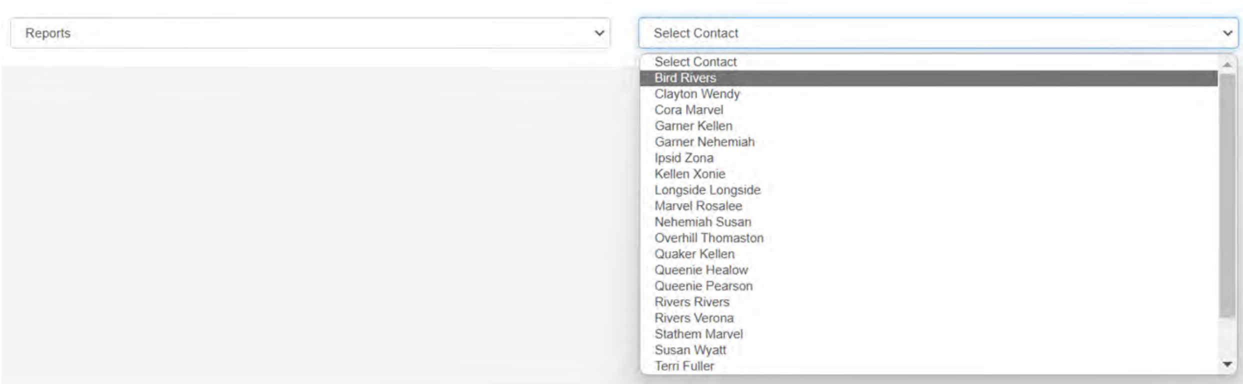
Daily Journal

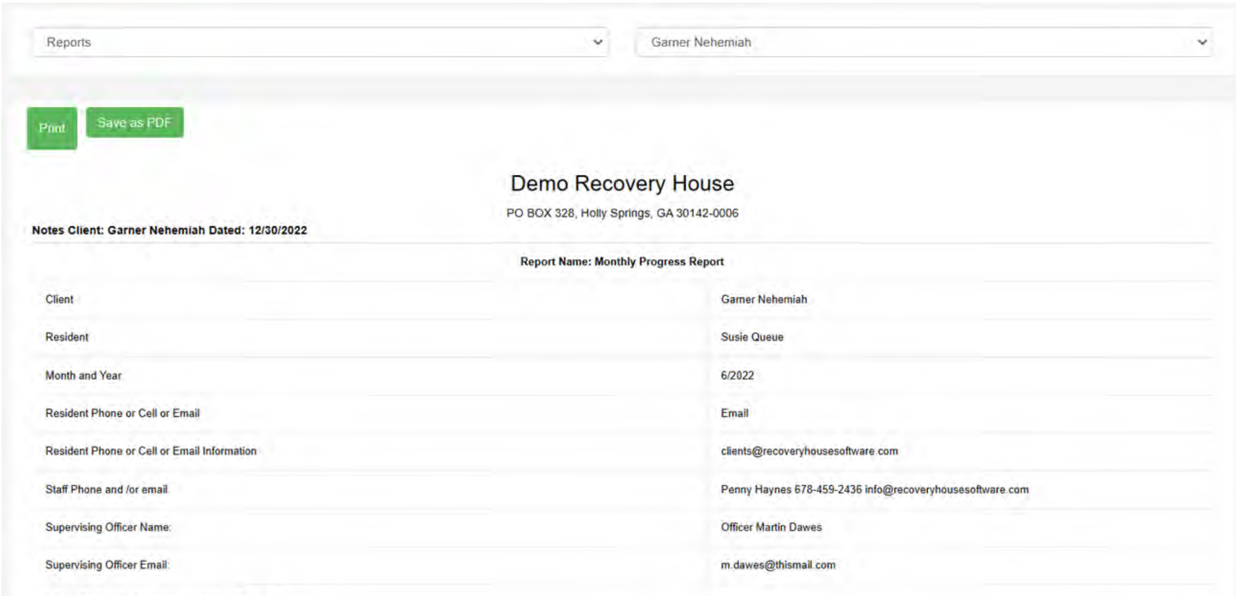


This allows you to see each client in alphabetical order and how many journals they have entered over the past week. You can filter by 1 through 7 days.

General Reports

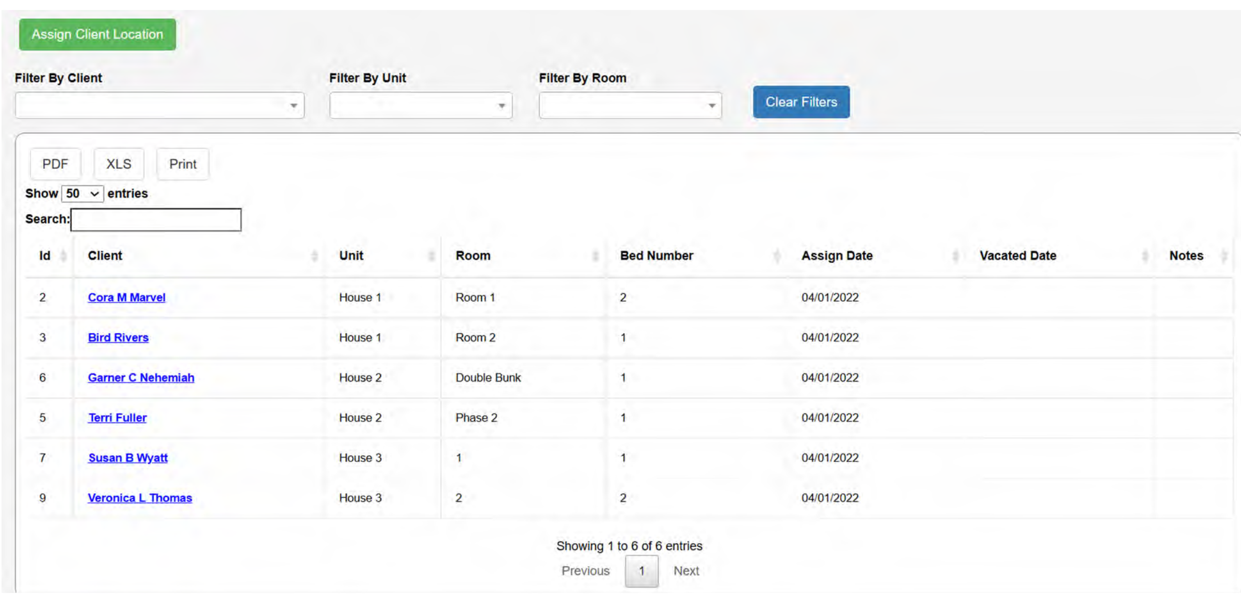






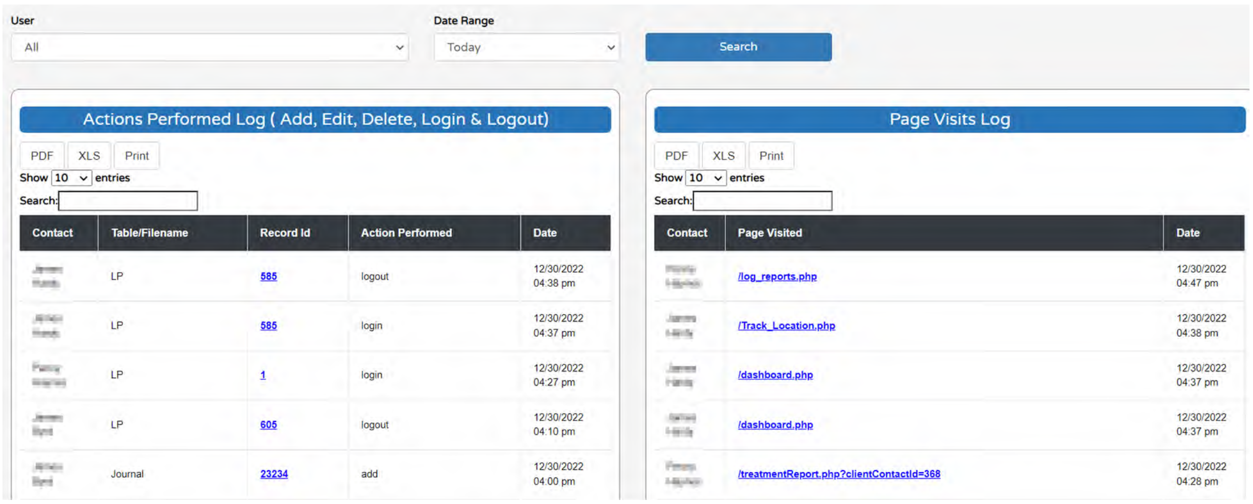
Select which types of Entries you want to run. Then select the Contact. You will then see all of those entries for that contact. You can Print the report or save it to PDF and download it.

Location List



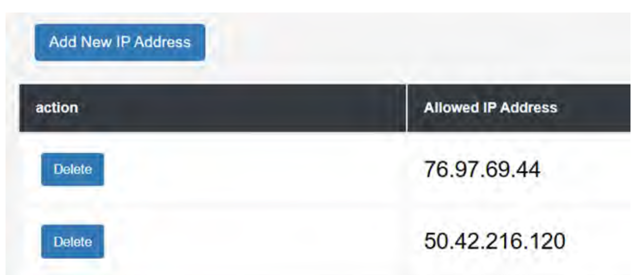
View where current clients are living. You can click on a Client name to open up their profile page. Use the Assign Client Location form to have a client VACATE a room before you move them to a new room, so the room is opened up for another client.

Log Reports



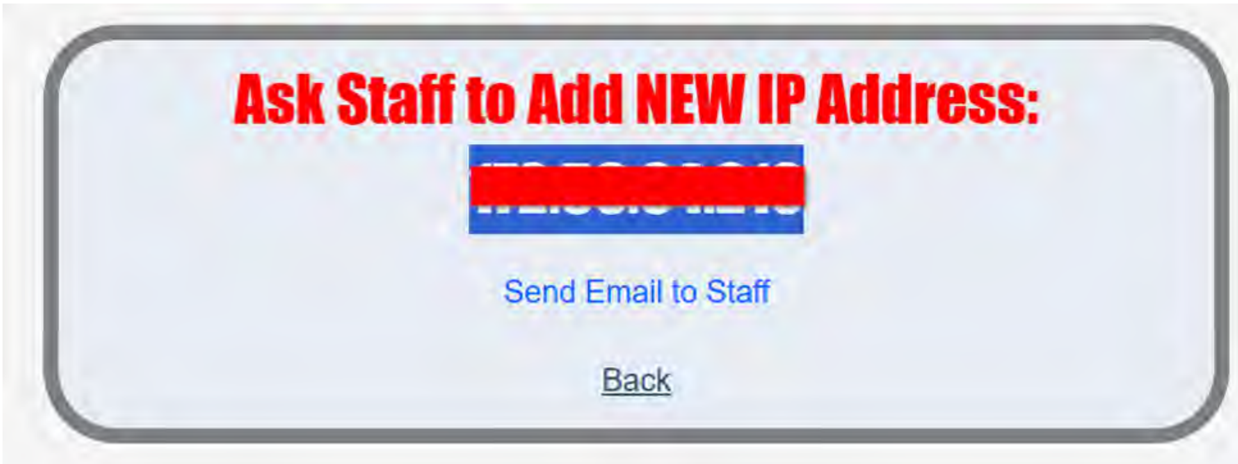
HIPAA requires that all record activity is logged and also saved on another server as a backup. You can filter by user and date range. You can export, search, print.

Manage IP

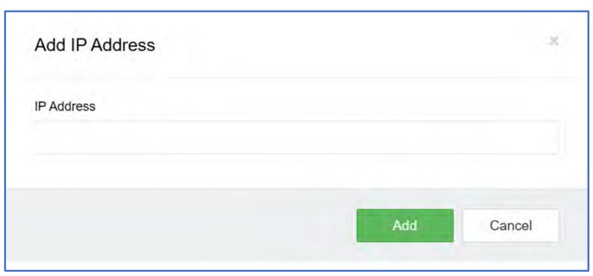


Clients cannot sign in or out unless the IP address of the device matches an IP address in this part of the program, so they cannot sign in or out from another location.

If your internet provider does not provide a static IP address, that means it will change.

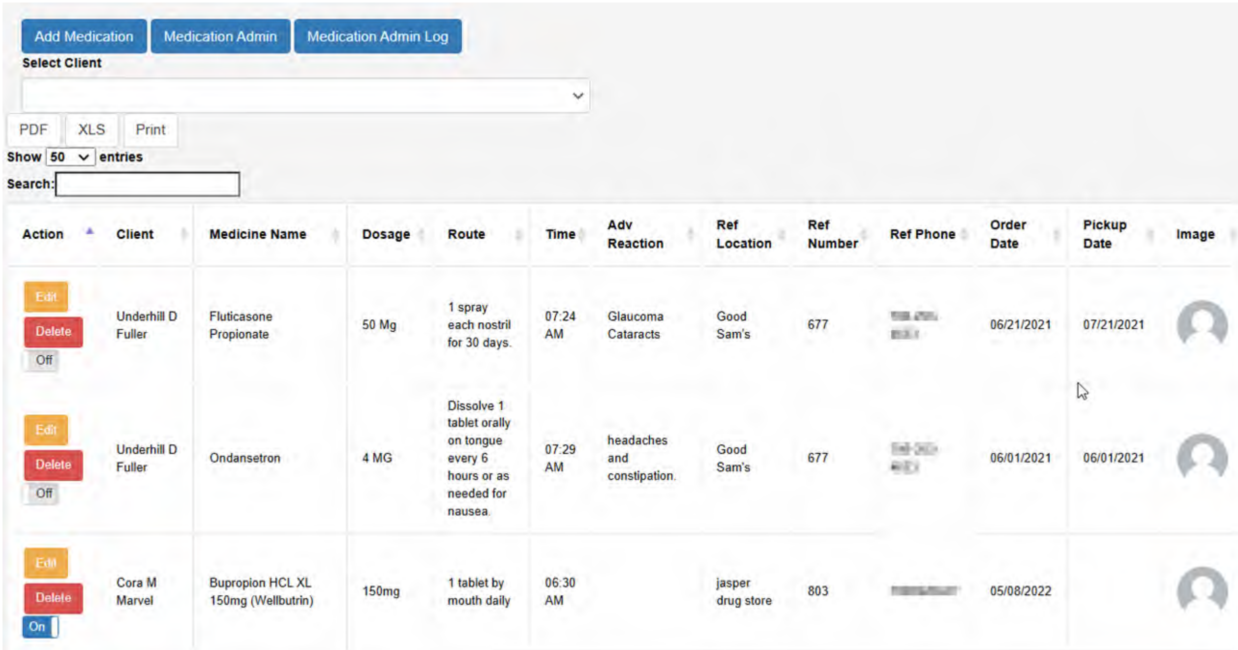


If a client attempts to sign in but the IP address is not valid, it will show the IP address they are presently on and give them the option to click a button to email staff that the IP Address has changed, and what the new address is. Take that IP address and add it via this form.

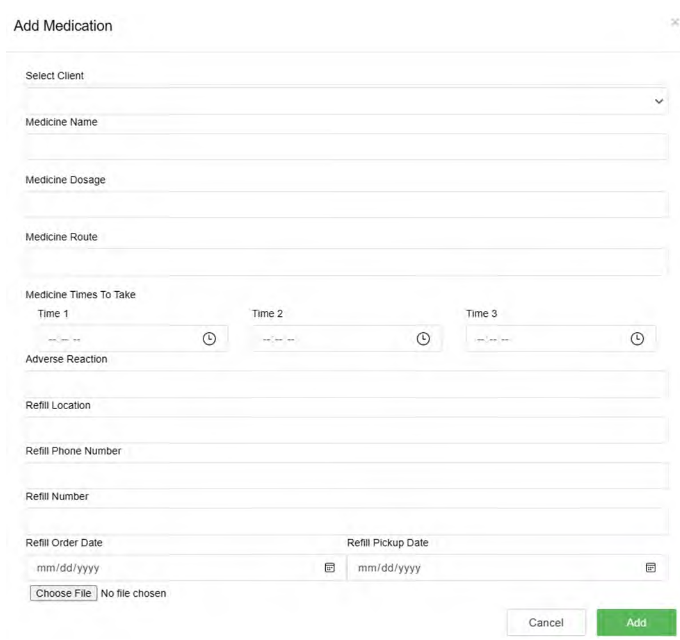


This is where you add valid IP addresses.

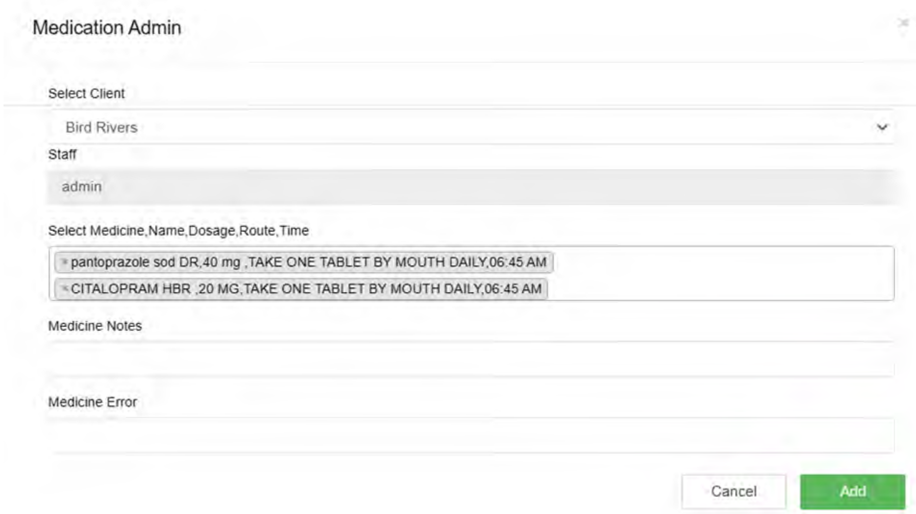
Medication



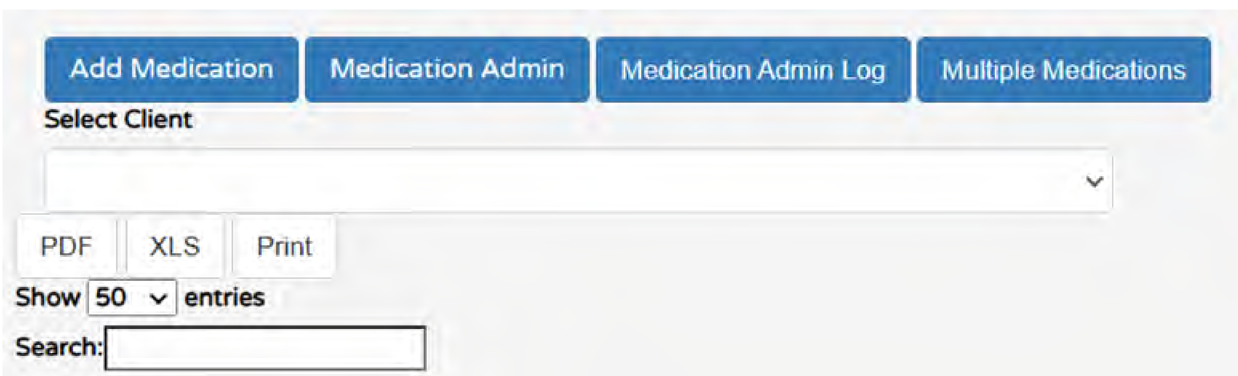
Track medication administration for clients. Add medication, keep a log of each medication administration and run reports for medication and medication administration per client.

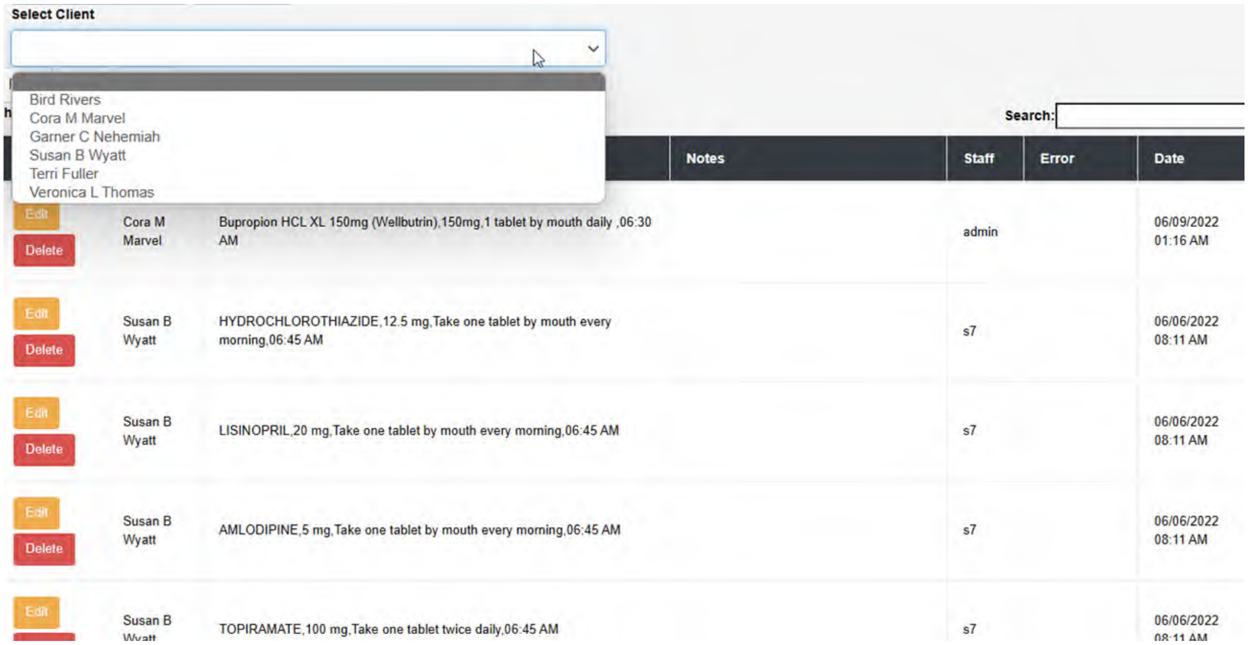


Select a client and then add the information about their medication, including adverse reactions, refill information, and even upload a picture as confirmation.



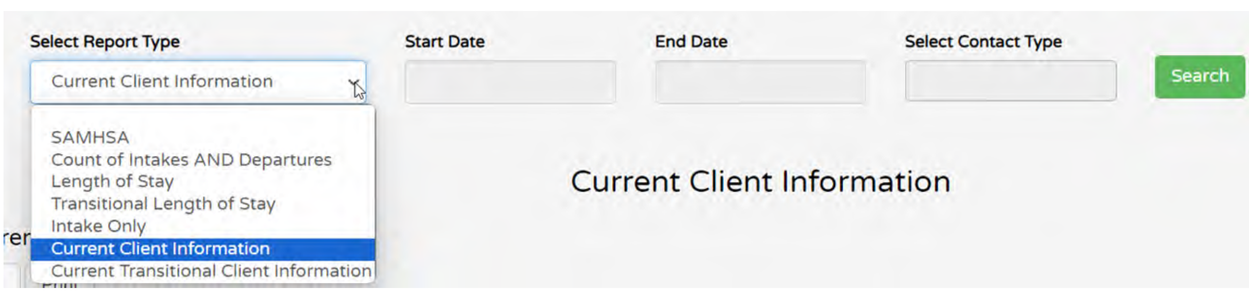
Log each time you administer medication. You can select multiple medications at one time per client. You can also use the Multiple Medication form for multiple clients at once.





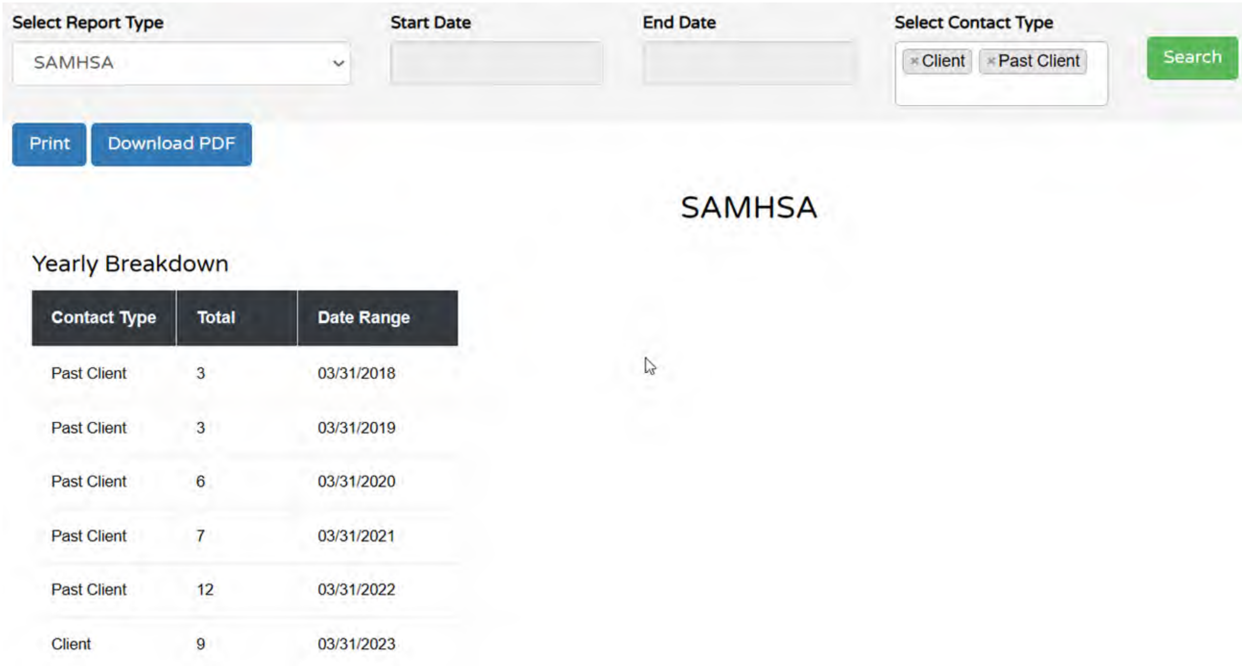
Search, filter, export and print Administration logs. (This is helpful if a client is taken by ambulance and the EMTs need a list of their medications.)

Metrics



Run reports on intakes, departures and current client information. More reports will be added upon client request. This page defaults to Current Client Information.

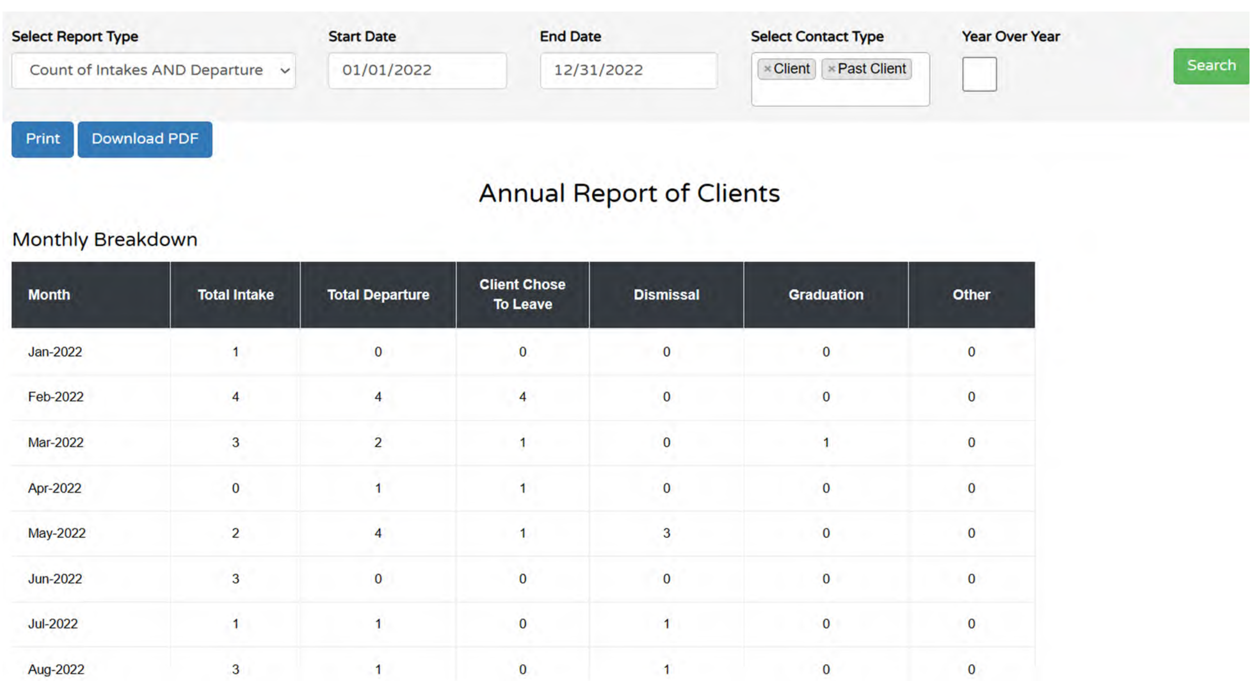
SAMHSA Annual Survey (How many clients were in your program on 3/31?)



Contact Type	Total	Date Range
Past Client	3	03/31/2018
Past Client	3	03/31/2019
Past Client	6	03/31/2020
Past Client	7	03/31/2021
Past Client	12	03/31/2022
Client	9	03/31/2023

Count of Intakes and Departures with totals and percentages

MONTHLY



Month	Total Intake	Total Departure	Client Chose To Leave	Dismissal	Graduation	Other
Jan-2022	1	0	0	0	0	0
Feb-2022	4	4	4	0	0	0
Mar-2022	3	2	1	0	1	0
Apr-2022	0	1	1	0	0	0
May-2022	2	4	1	3	0	0
Jun-2022	3	0	0	0	0	0
Jul-2022	1	1	0	1	0	0
Aug-2022	3	1	0	1	0	0

Total	22	20	11	6	3	0
Percentage			50.00%	27.27%	13.64%	0.00%
Month	Total Intake	Total Departure	Client Chose To Leave	Dismissal	Graduation	Other

YEARLY

Length of Stay

This report allows you to see how long Clients stayed in the program broken up by selected demographics.

Transitional Length of Stay

This report allows you to see how long Transitional Clients stayed in the program broken up by selected demographics.

Intake Only

How many clients did you receive every month.

Current Client Information

13 Total Current Clients

PDF XLS Print

Show 200 entries

Search:

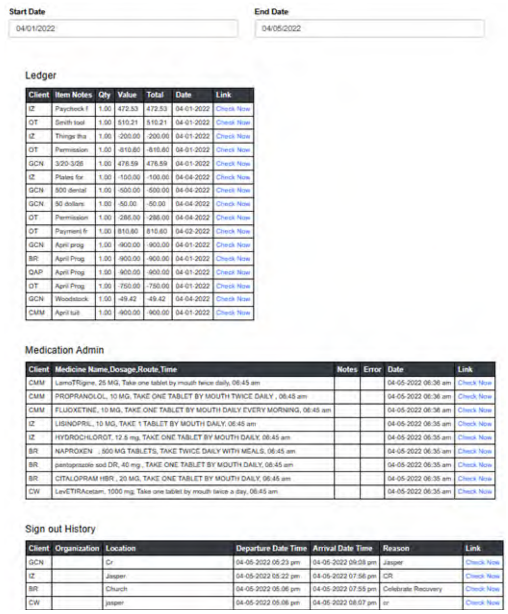
Client	Phase	Intake Date	Expected Graduation Date	Time Until Graduation	Employer	Operating Balance	Wages Balance	Last Payment	Custom Data	Contact Phone	Contact Email
[redacted]	2	11/07/2022	11/07/2023	21 day(s)	[illegible]	0.00	9.25	$1000.00 , 10/05/2023		[illegible]	[illegible]
[redacted]	2	11/29/2022	12/29/2023	2 month(s),12 day(s)	[illegible]	0.00	2,067.64	$1000.00 , 10/03/2023		[illegible]	[illegible]
[redacted]	2	01/11/2023	01/11/2024	2 month(s),25 day(s)	[illegible]	-2,342.78	10.00	$500.00 , 10/03/2023	Working Scholarship	[illegible]	[illegible]
[redacted]	2	12/16/2022	01/16/2024	2 month(s),30 day(s)	[illegible]	-2,726.16	0.00	$1000.00 , 10/05/2023	Loan	[illegible]	[illegible]
[redacted]	2	04/12/2023	04/12/2024	5 month(s),26 day(s)	[illegible]	-3,920.20	700.00	$1500.00 , 10/03/2023	Loan	[illegible]	[illegible]
[redacted]	2	04/28/2023	04/28/2024	6 month(s),11 day(s)	[illegible]	-4.00	303.00	$1000.00 , 09/27/2023		[illegible]	[illegible]

This report is also emailed to you every Monday so you can review who has paid and the status of their accounts. In the email report, if a client owes any money, they will be highlighted in red. You can select the email address to receive this report in the Admin Dashboard.

Current Transitional Client Information

The same as the Current Client Information, only for Transitional Clients.

Records By Date



Start Date

04/01/2022

End Date

04/05/2022

Ledger

Client	Item Notes	Qty	Value	Total	Date	Link
IZ	Paycheck f	1.00	472.53	472.53	04-01-2022	Check Now
OT	Smith tool	1.00	510.21	510.21	04-01-2022	Check Now
IZ	Things tha	1.00	-200.00	-200.00	04-01-2022	Check Now
OT	Permission	1.00	-810.60	-810.60	04-01-2022	Check Now
GCN	3/20-3/26	1.00	476.59	476.59	04-01-2022	Check Now
IZ	Plates for	1.00	-100.00	-100.00	04-04-2022	Check Now
GCN	500 dental	1.00	-500.00	-500.00	04-04-2022	Check Now
GCN	50 dollars	1.00	-50.00	-50.00	04-04-2022	Check Now
OT	Permission	1.00	-286.00	-286.00	04-04-2022	Check Now
OT	Payment fr	1.00	810.60	810.60	04-02-2022	Check Now
GCN	April prog	1.00	-900.00	-900.00	04-01-2022	Check Now
BR	April Prog	1.00	-900.00	-900.00	04-01-2022	Check Now
QAP	April Prog	1.00	-900.00	-900.00	04-01-2022	Check Now
OT	April Prog	1.00	-750.00	-750.00	04-01-2022	Check Now
GCN	Woodstock	1.00	-49.42	-49.42	04-04-2022	Check Now
CMM	April tuit	1.00	-900.00	-900.00	04-01-2022	Check Now

Medication Admin

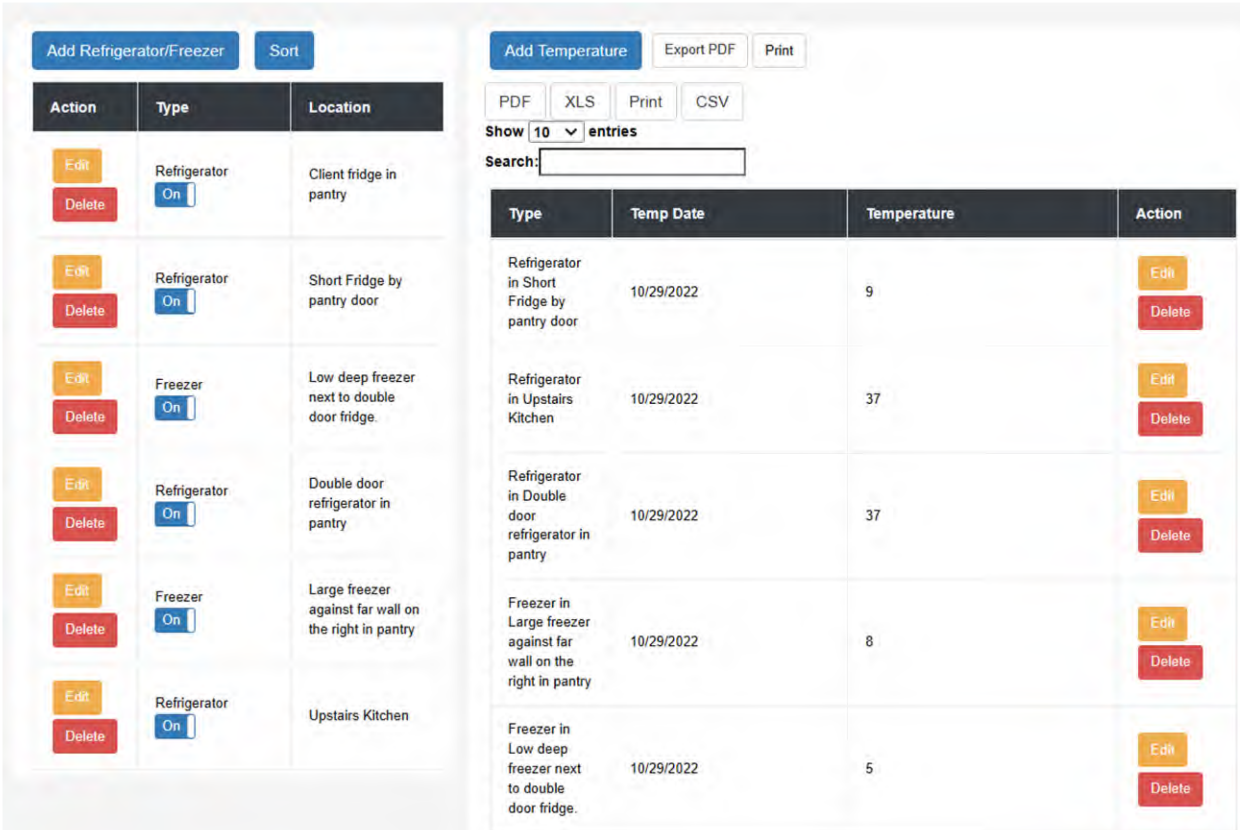
Client	Medicine Name,Dosage,Route,Time	Notes	Error	Date	Link
CMM	LamoTRigine, 25 MG, Take one tablet by mouth twice daily, 06:45 am			04-05-2022 06:36 am	Check Now
CMM	PROPRANOLOL, 10 MG, TAKE ONE TABLET BY MOUTH TWICE DAILY , 06:45 am			04-05-2022 06:36 am	Check Now
CMM	FLUOXETINE, 10 MG, TAKE ONE TABLET BY MOUTH DAILY EVERY MORNING, 06:45 am			04-05-2022 06:36 am	Check Now
IZ	LISINOPRIL, 10 MG, TAKE 1 TABLET BY MOUTH DAILY, 06:45 am			04-05-2022 06:35 am	Check Now
IZ	HYDROCHLOROT, 12.5 mg, TAKE ONE TABLET BY MOUTH DAILY, 06:45 am			04-05-2022 06:35 am	Check Now
BR	NAPROXEN , 500 MG TABLETS, TAKE TWICE DAILY WITH MEALS, 06:45 am			04-05-2022 06:35 am	Check Now
BR	pantoprazole sod DR, 40 mg , TAKE ONE TABLET BY MOUTH DAILY, 06:45 am			04-05-2022 06:35 am	Check Now
BR	CITALOPRAM HBR , 20 MG, TAKE ONE TABLET BY MOUTH DAILY, 06:45 am			04-05-2022 06:35 am	Check Now
CW	LevETIRAcetam, 1000 mg, Take one tablet by mouth twice a day, 06:45 am			04-05-2022 06:36 am	Check Now

Sign out History

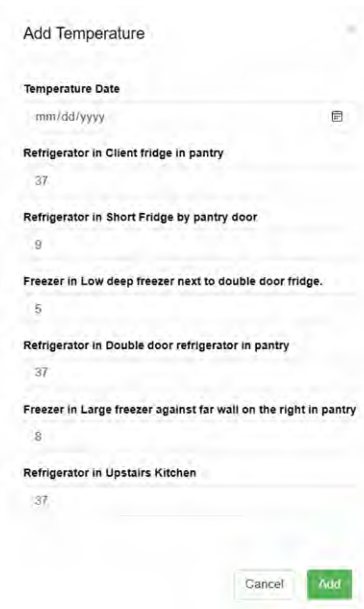
Client	Organization	Location	Departure Date Time	Arrival Date Time	Reason	Link
GCN		Cr	04-05-2022 05:23 pm	04-05-2022 09:08 pm	Jasper	Check Now
IZ		Jasper	04-05-2022 05:22 pm	04-05-2022 07:56 pm	CR	Check Now
BR		Church	04-05-2022 05:06 pm	04-05-2022 07:55 pm	Celebrate Recovery	Check Now
CW		jasper	04-05-2022 05:06 pm	04-05-2022 08:07 pm	cr	Check Now

Select starting and ending dates, and you will see all records entered during that time period. You can click on records to go directly to them.

Refrigerator

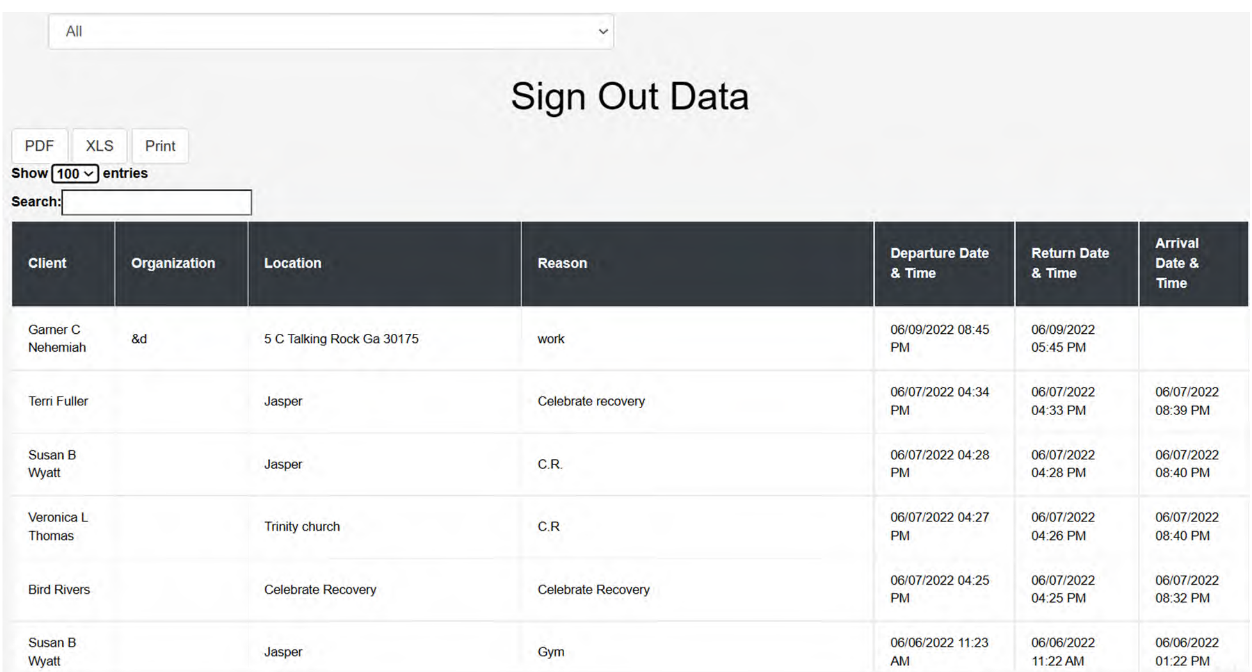


Some accrediting organizations require you to log your refrigerator and freezer temperatures daily. You can add, delete, edit, and if an appliance goes out of service, turn off" refrigerators and freezers. You can review the logs, as well as print, search and export.



Since temperatures normally remain approximately the same, the Form for capturing the temperatures will pull in the temperature for the day before, so you only need to edit temperatures that have changed.

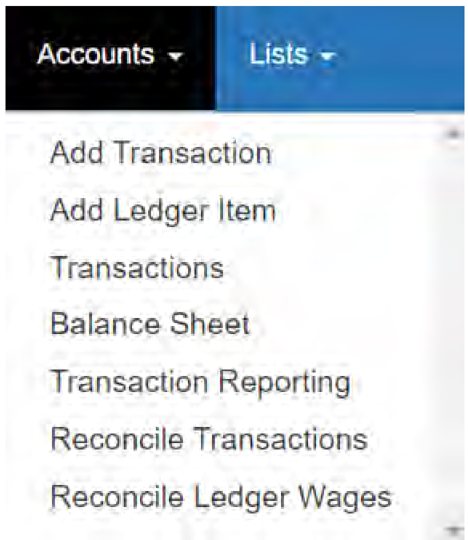
Sign Out Data



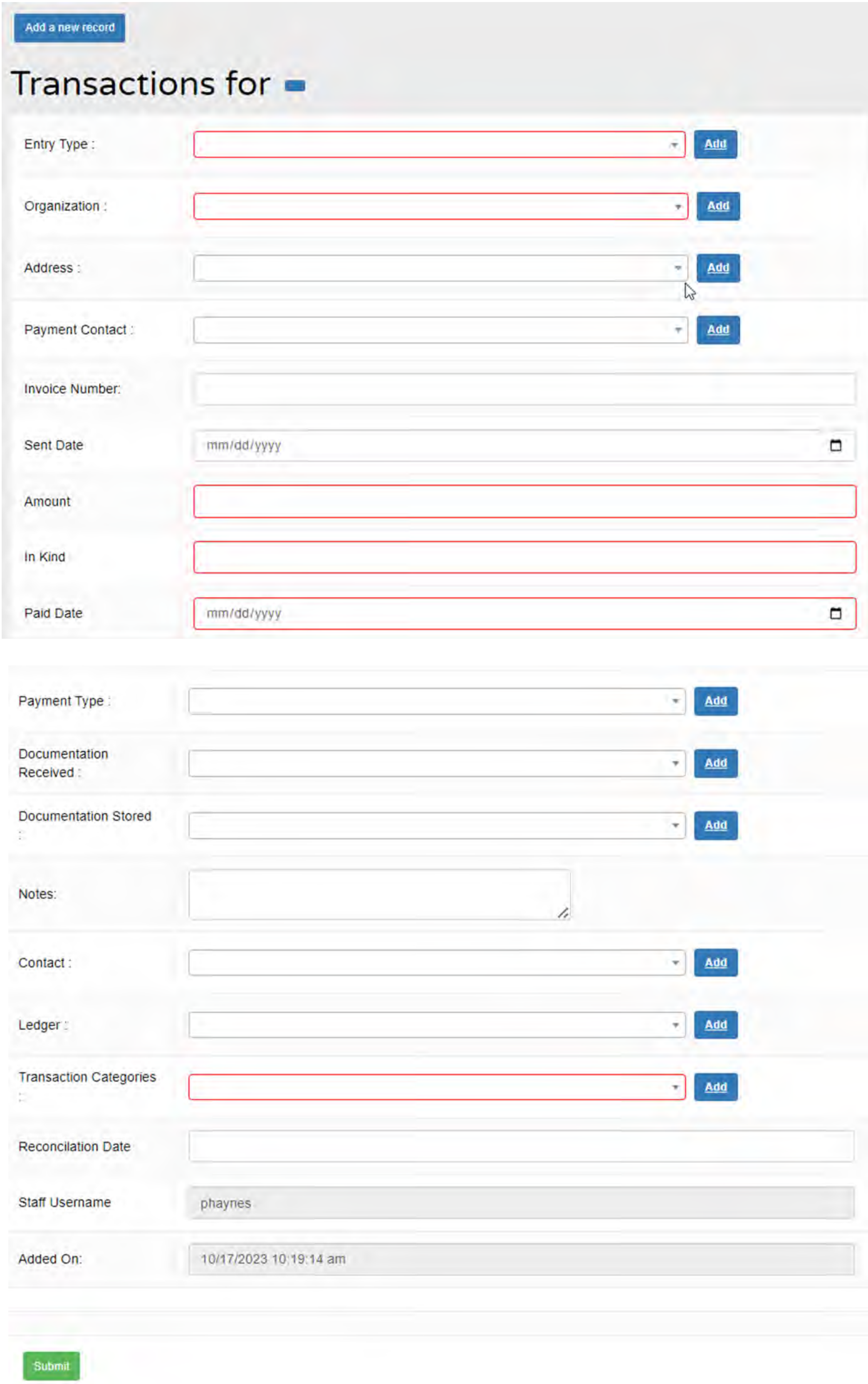
Client	Organization	Location	Reason	Departure Date & Time	Return Date & Time	Arrival Date & Time
Garner C Nehemiah	&d	5 C Talking Rock Ga 30175	work	06/09/2022 08:45 PM	06/09/2022 05:45 PM	
Terri Fuller		Jasper	Celebrate recovery	06/07/2022 04:34 PM	06/07/2022 04:33 PM	06/07/2022 08:39 PM
Susan B Wyatt		Jasper	C.R.	06/07/2022 04:28 PM	06/07/2022 04:28 PM	06/07/2022 08:40 PM
Veronica L Thomas		Trinity church	C.R	06/07/2022 04:27 PM	06/07/2022 04:26 PM	06/07/2022 08:40 PM
Bird Rivers		Celebrate Recovery	Celebrate Recovery	06/07/2022 04:25 PM	06/07/2022 04:25 PM	06/07/2022 08:32 PM
Susan B Wyatt		Jasper	Gym	06/06/2022 11:23 AM	06/06/2022 11:22 AM	06/06/2022 01:22 PM

View all sign in and out data. Filter by client. Search, export, print.

ACCOUNTS



Add Transaction


Add a new record
Transactions for
Entry Type :
Add
Organization :
Add
Address :
Add
Payment Contact :
Add
Invoice Number:
Sent Date
mm/dd/yyyy
Amount
In Kind
Paid Date
mm/dd/yyyy
Payment Type :
Add
Documentation Received :
Add
Documentation Stored :
Add
Notes:
Contact :
Add
Ledger :
Add
Transaction Categories :
Add
Reconcilation Date
Staff Username
phaynes
Added On:
10/17/2023 10:19:14 am
Submit

ENTRY TYPE

Start by selecting which type of transaction it is: **Payment, Received, Donation, Transfer, Merchant Fees, Gift Card, Loan**.

If it is a Payment or Merchant Fees, it will automatically change the amount to a negative number after you press submit.

For Received and Donation transactions, it will change the amount to a positive number.

For Transfers, you must enter a minus sign if it will be a negative number.

MERCHANT FEES

Merchant Fees is used for fees paid out to payment processors for monies received (Program Fees, etc.) or donated. It defaults to a negative amount.

If a Donor uses Paypal or Venmo or a Credit Card processor to send $100.00 to your organization, the transaction should show the entire amount donated ($100.00), so your Donation Letter will match the Donor's records.

However, when you transfer the money from your payment processor to your bank, the bank statement will show the net amount received ($98.00) after fees are deducted ($2.00).

So the Accounting system is set up for you to enter a Donation transaction of $100 received from Venmo, and then a separate Merchant Fees transaction to Venmo (-$2.00).

This way, when you reconcile your bank statement, you will check both the Donation ($100.00) and the Merchant Fees (-$2.00) transactions so the 2 entries total the amount credited on your Bank Statement.

ORGANIZATION

Select the Organization that you paid or who paid you. You can add an Organization on the fly. The Organization is important, because when you upload any attachments to the transaction, it will be filed under the Organization's folder.

ADDRESS

Address allows you to select or add an address for the transaction Organization.

PAYMENT CONTACT

Payment Contact ID is the contact for the Organization who either paid your organization, or who in your organization made a payment to someone else.

INVOICE NUMBER

This field can be used for Invoice Numbers, or any other short notes to help you reconcile your transactions. We use it in conjunction with Merchant Fees, to group together which Donation goes with which Merchant Fees transaction, or to note which transactions belong to a large bank deposit.

SENT DATE

You can enter Invoices to be paid and include the Sent Date for the Invoice. This field is optional. The most important field on the transaction is Paid Date.

AMOUNT

Enter the total amount received or paid.

IN KIND

Enter the donor-valued amount of the item received.

PAID DATE

This is the only REQUIRED date field for Transactions. This is the date that will be used on the Reconciliation and Reporting modules.

PAYMENT TYPE

How was the money received or paid? Paypal, Venmo, Debit Card, Credit Card, Online Banking, etc.

DOCUMENTATION RECEIVED

Where did you receive proof of this payment or receipt? Invoice, receipt, email, bank statement, etc.

DOCUMENTATION STORED

Where did you store that documentation? Did you upload to or copy into the database? Are you storing these documents elsewhere?

NOTES

Enter a description or explanation of the transaction. Paste in Credit Card, Paypal or Venmo transaction details.

CONTACT

Is this transaction connected to a Client? Will you be assigning a charge or a payment to the Client's ledger? If so, select the Client.

LEDGER

After you have assigned a payment or charge to a Client's ledger, the corresponding ledger item will show up in this field.

TRANSACTION CATEGORIES

Select a Category for the income or expense.

RECONCILIATION DATE

The software will add a Reconciliation date to this field after Reconciliation is completed and lock the record to everyone other than the Administrator. The Administrator can remove the Reconciliation date to re-open the Transaction and then enter it manually again.

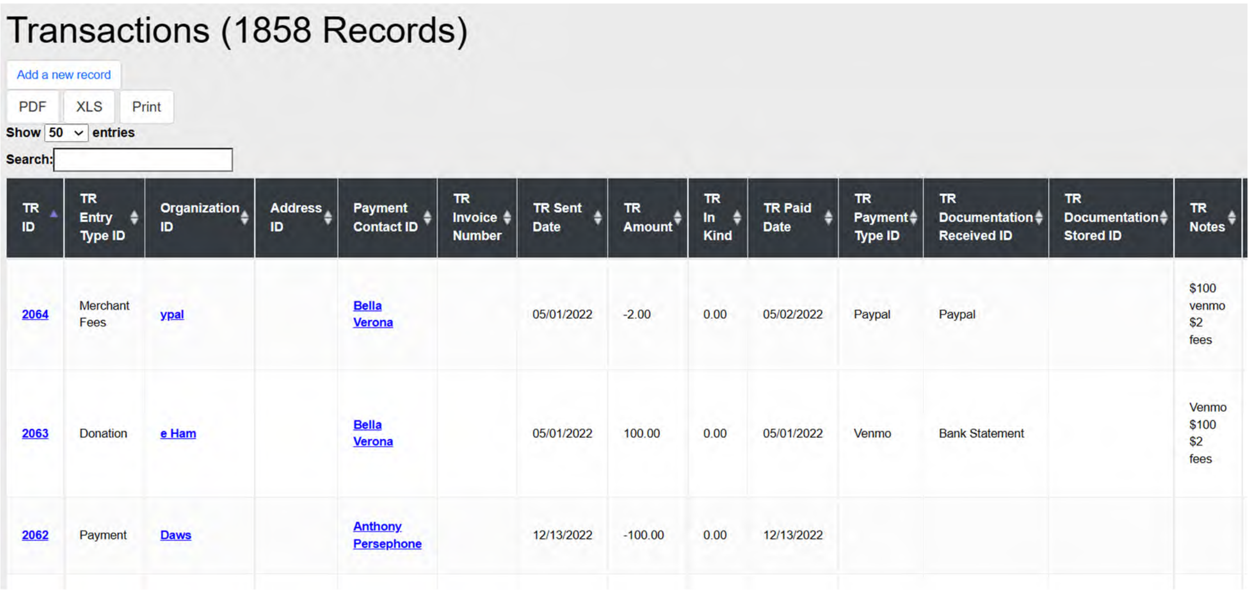
STAFF USERNAME

The software automatically saves the username of the person who creates the Transaction. If the transaction was created from an online public payment page, this will be blank.

ADDED ON

The software automatically saves the date and time the record was created.

Transactions



Transactions (1858 Records)

Add a new record

PDF XLS Print

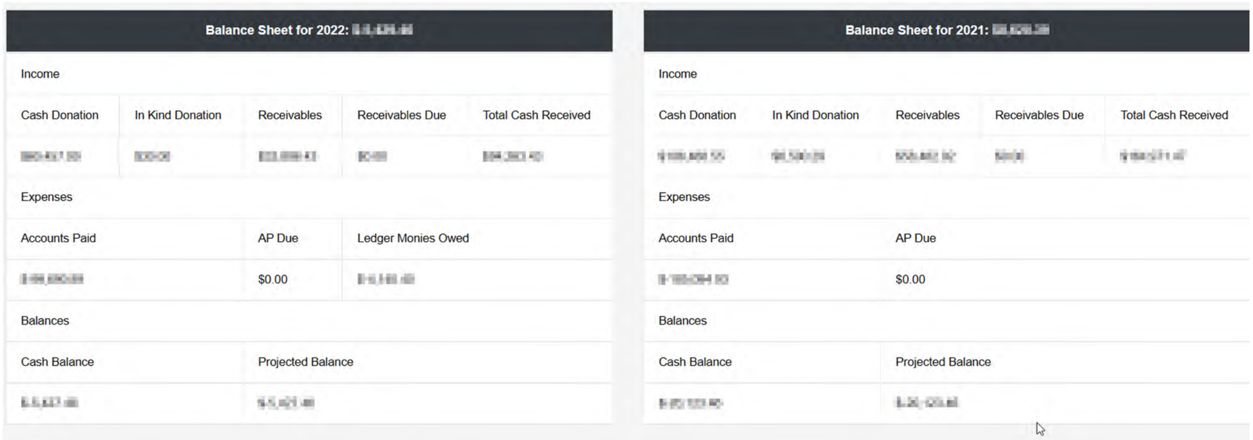
Show 50 entries

Search:

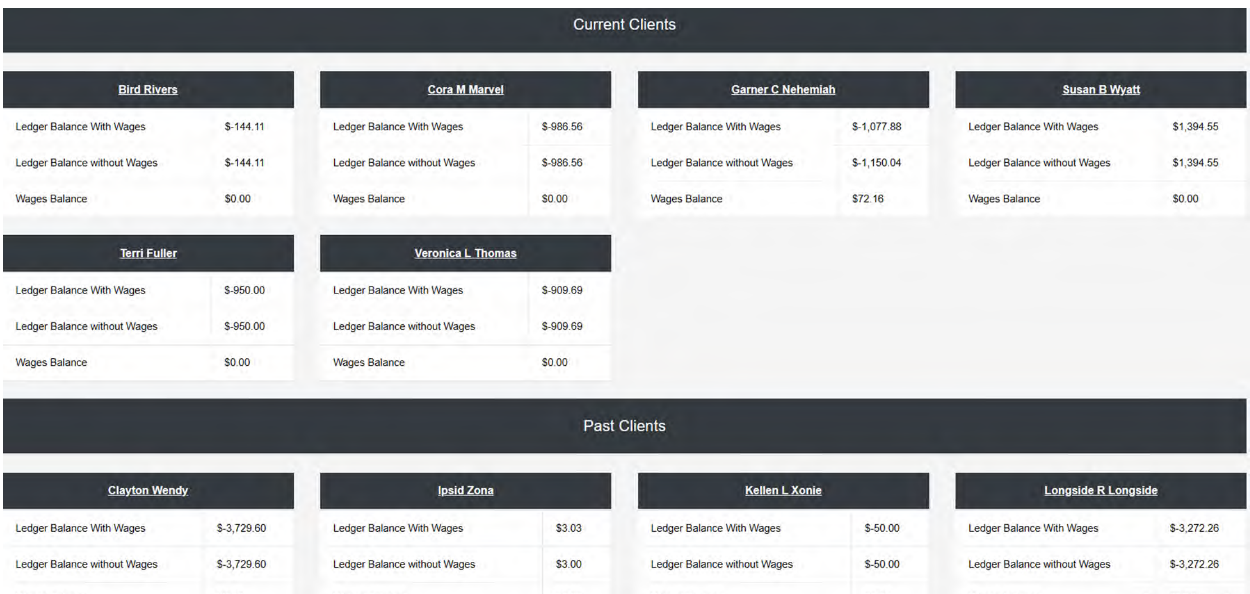
TR ID	TR Entry Type ID	Organization ID	Address ID	Payment Contact ID	TR Invoice Number	TR Sent Date	TR Amount	TR In Kind	TR Paid Date	TR Payment Type ID	TR Documentation Received ID	TR Documentation Stored ID	TR Notes
2064	Merchant Fees	ypal		Bella Verona		05/01/2022	-2.00	0.00	05/02/2022	Paypal	Paypal		$100 venmo $2 fees
2063	Donation	e Ham		Bella Verona		05/01/2022	100.00	0.00	05/01/2022	Venmo	Bank Statement		Venmo $100 $2 fees
2062	Payment	Daws		Anthony Persephone		12/13/2022	-100.00	0.00	12/13/2022				

View, search, sort, export and print transactions.

Balance Sheet



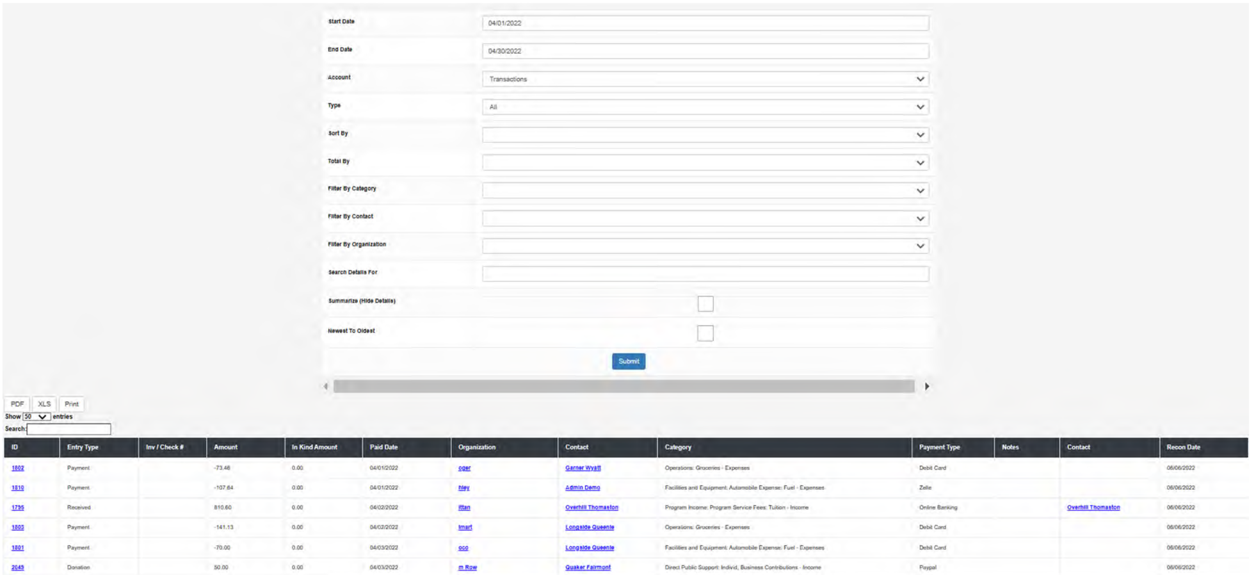
At the top you will see each year's Income and Expenses per the Transactions. In the current year, it will also show the monies owed by current clients (Ledger Monies Owed).



Further down the page, it will show Account Balances for current clients, as well as past clients. It will also show their Program Fees balance, as well as how much actual money they have in the joint client bank account (if your program uses one).

You can also click on the Client name and open up their Profile Page in another tab.

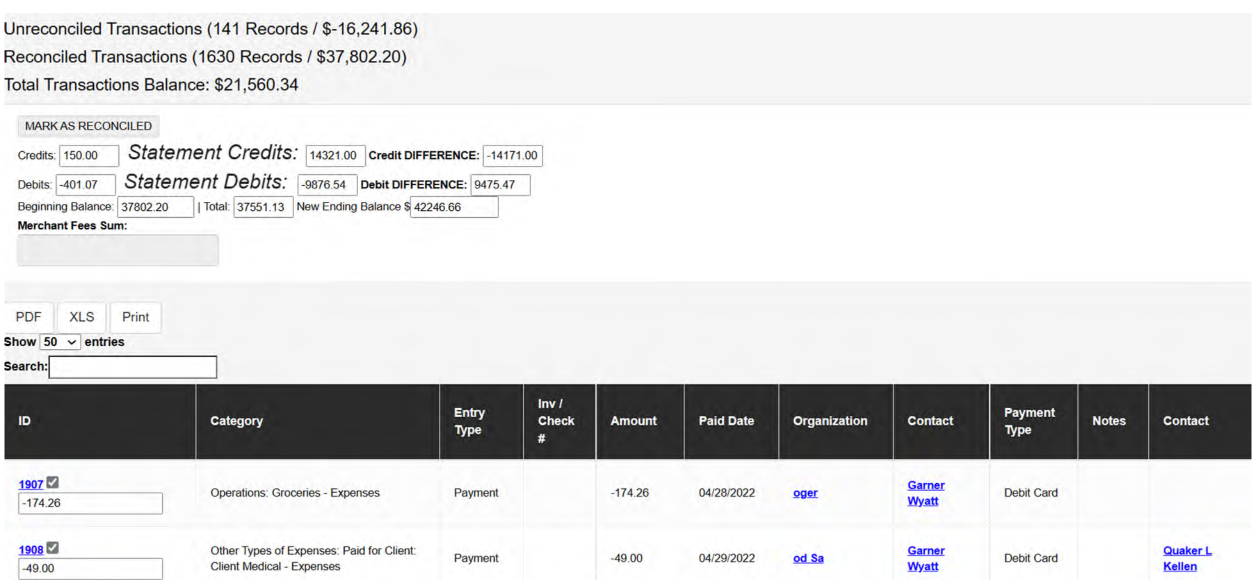
Transaction Reporting



Enter a date range, select the type of records (Transactions or Ledger Items), choose different parameters and filters.

Search, export, print and sort the results.

Reconcile Transactions



This form will allow you to review and check Transactions against your Bank Statement.

You enter the Credits and Debits from your Bank Statement.

As you check off Transactions that match the Bank Statement, you will see the page calculate the debits and credits and the difference between the Bank Statement.

If a Transaction is a Merchant Fee, you will see a separate calculation for Merchant Fees on the top left.

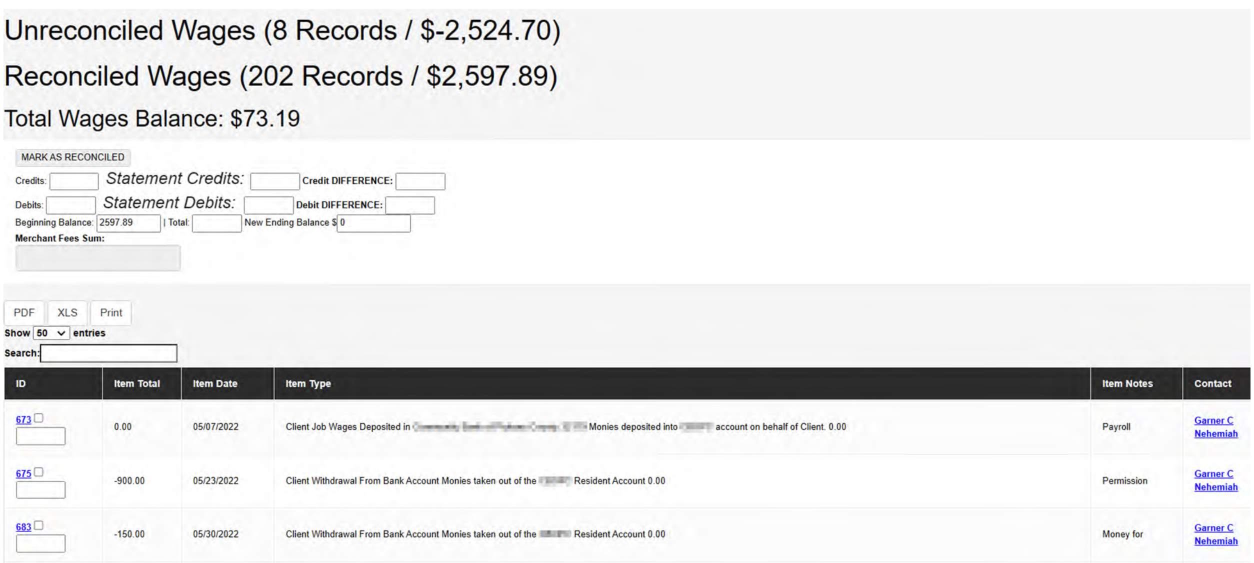
RECONCILIATION NOTES

- If there are Merchant Fees, then the Credit DIFFERENCE and Debit DIFFERENCE fields will match the Merchant Fees Sum.
- Payment processors deduct the fees before transferring the remaining money to your bank.
  - You receive a $100 donation via Venmo from Sally Jones.
  - Only $98 gets transferred to your bank because Venmo took out -$2.00.
  - So your Transaction Credits will show a Venmo donation for $100.00, which is $2.00 more than the $98.00 Bank Statement deposit will show.
  - Also, the negative -$2.00 paid as Bank Charges is $2.00 less than the Bank's Debits will show.
  - So Merchant Fees will be -$2.00, Credit DIFFERENCE will show positive $2.00, and Debit DIFFERENCE will show negative $-2.00. That all matches, so you can reconcile.

- Until the Credit DIFFERENCE and Debit DIFFERENCE match, the MARK AS RECONCILED button remains disabled. When those amounts match, a pop up will tell you that the MARK AS RECONCILED button is now ready.
- When you press MARK AS RECONCILED, today's date is set as the Reconciliation Date for each checked transaction.
- CREDIT CARD PAYMENTS: In order for our annual budgets to be correct, we must keep track of our purchases and their categories. Some purchases are made by credit card. However, the Bank Statement will only show a lump sum payment to the Credit Card Bank. Here is how we handle that.
    - We enter individual transactions for each Credit Card Purchase, making sure to enter
      *****Part of $1,234.51 CC Payment 12/01/2022*****
      in each Invoice Number field to tie the separate transactions together.
      This makes it easier to search/filter for and check all Transactions related to this one Credit Card payment shown in the Bank Statement.
- Credit Card REFUNDS will INFLATE your Credit DIFFERENCE and Debit DIFFERENCE, making your numbers look wrong, but they are not.
-
    - You enter a Transaction for a Payment to Marriott for $500 to reserve a hotel room with your credit card (debit of $500).
    - They refund $200 to your credit card after your stay, so you enter a Transaction Received for $200.00 (credit of $200).
    - Your bank statement only shows a Payment of $300 (debit of $300).

- So neither of your Transactions match the amount on your bank statement.
- So your Credit DIFFERENCE will show that you have $200 more than the bank statement shows.
- Your Debit DIFFERENCE will show that you have $200 less than the bank statement shows.
- In any case, the program know that all of the credits and debits match before you can reconcile.

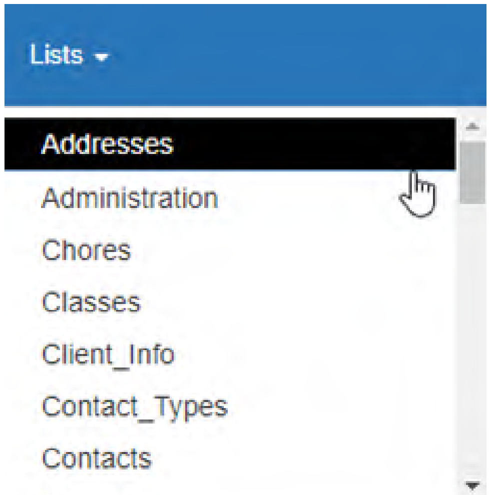
Reconcile Ledger Wages



This works exactly like the Reconcile Transactions module.

This is for a second bank account, intended to be for holding client money if your program helps your clients manage their money.

LISTS



You can export these tables of information to PDF, XLS, or Print.

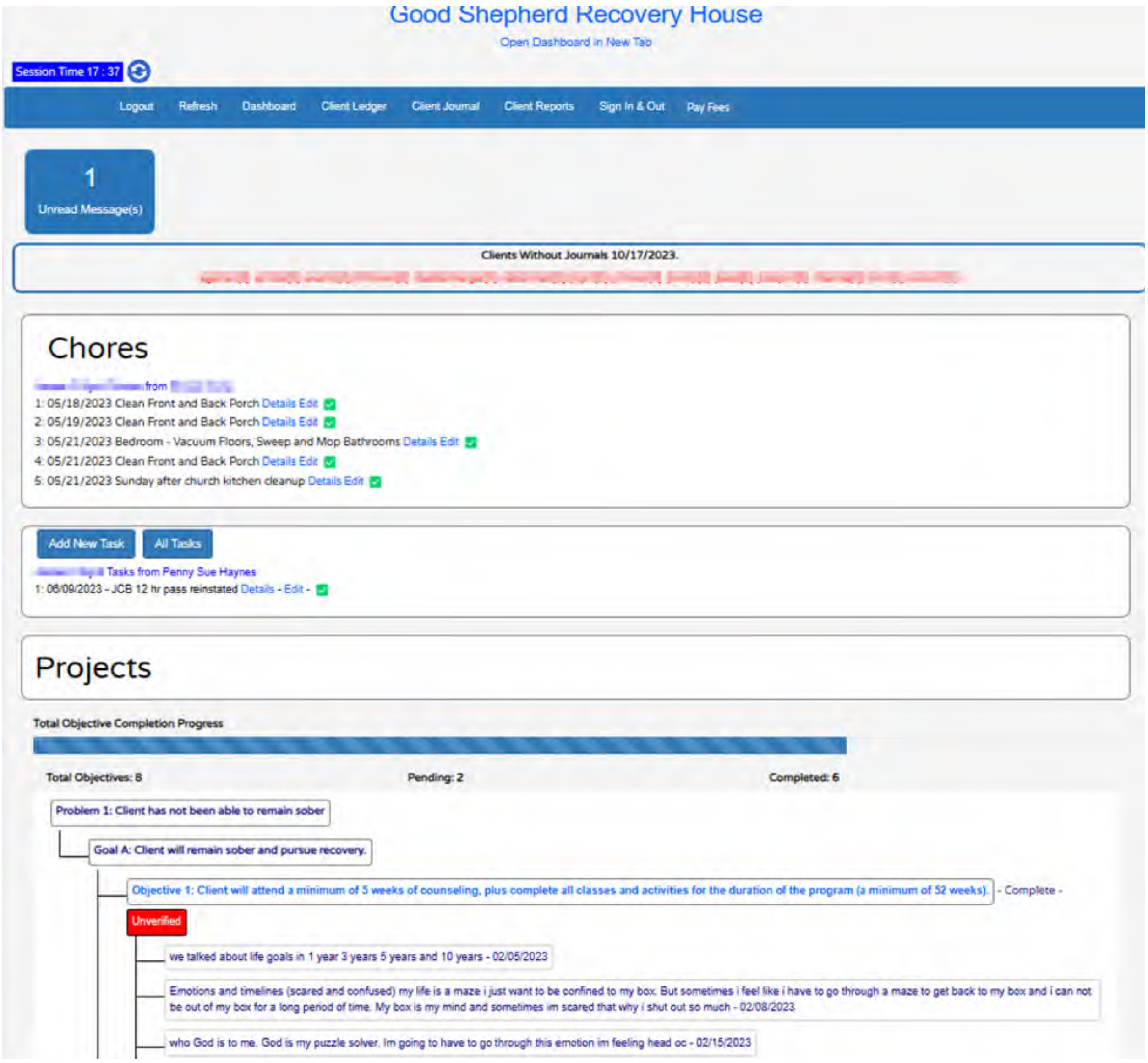
You can select the number of entries, or rows, to display.

You can search for data within the columns.

You can sort by 1 column at a time.

You can select a record to view or edit it.

CLIENT DASHBOARD

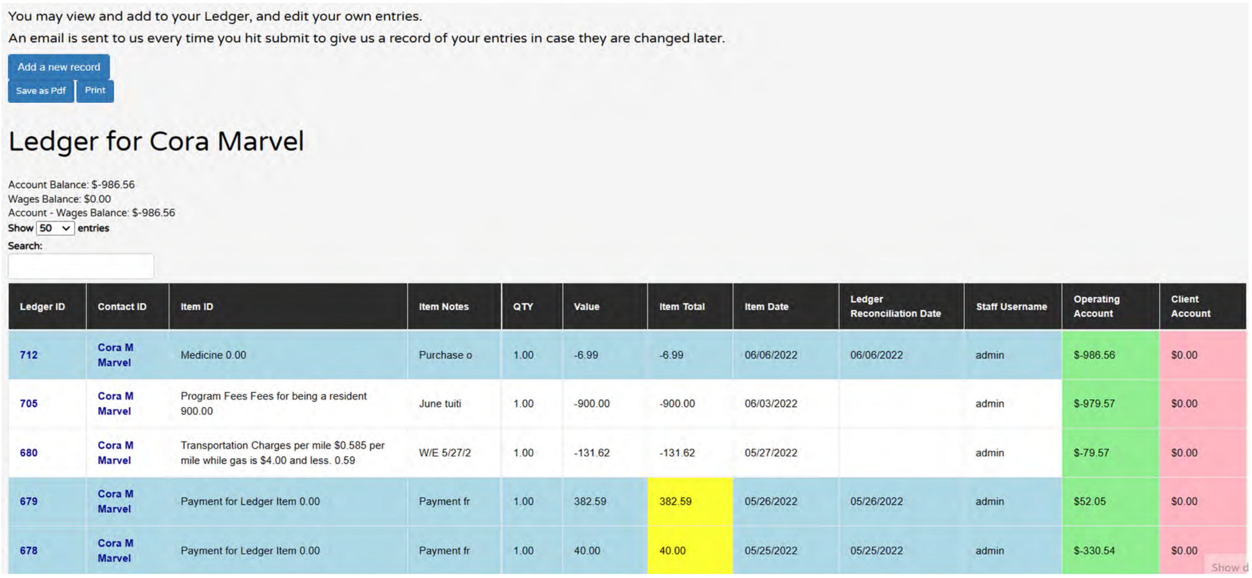


The Client menu gives the Client access to the

- Ledger, where they can keep track of their charges, as well as monies they deposits or withdraws from the Client Bank Account.
- Journal, where they enter notes from activities and classes to prove attendance.

- Reports, where they can enter Pass and Visitation Requests, do weekly or monthly reports, Discharge Plan, and any report created with the category Client Reports.
- Sign In & Out, where they digitally enter where they are going and when they plan to return, and then sign back in when they return home.
- Pay Fees, where they can pay by debit card, credit card, Cashapp Card or Paypal and the transactions are automatically entered into the database.

Client Ledger



You may view and add to your Ledger, and edit your own entries.
An email is sent to us every time you hit submit to give us a record of your entries in case they are changed later.

Add a new record
Save as Pdf | Print

Ledger for Cora Marvel

Account Balance: $-986.56
Wages Balance: $0.00
Account - Wages Balance: $-986.56
Show 50 entries
Search:

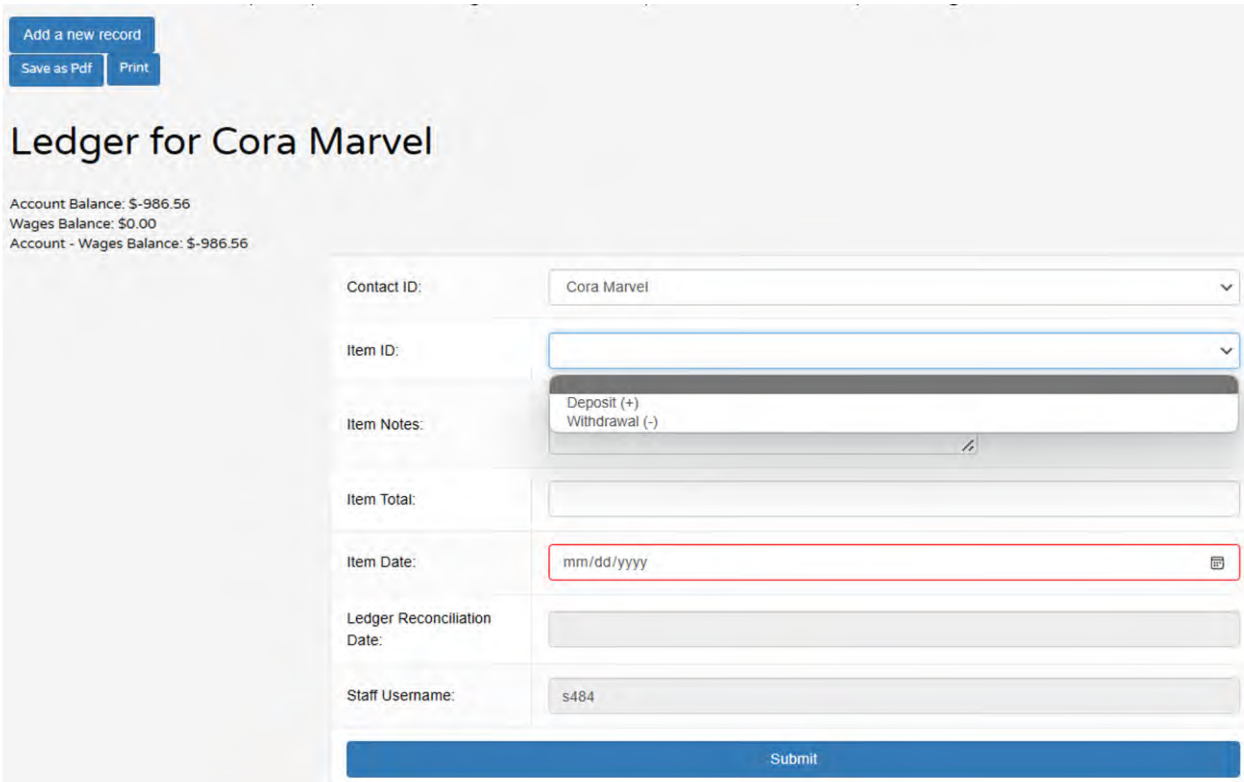
Ledger ID	Contact ID	Item ID	Item Notes	QTY	Value	Item Total	Item Date	Ledger Reconciliation Date	Staff Username	Operating Account	Client Account
712	Cora M Marvel	Medicine 0.00	Purchase o	1.00	-6.99	-6.99	06/06/2022	06/06/2022	admin	$-986.56	$0.00
705	Cora M Marvel	Program Fees Fees for being a resident 900.00	June tuiti	1.00	-900.00	-900.00	06/03/2022		admin	$-979.57	$0.00
680	Cora M Marvel	Transportation Charges per mile $0.585 per mile while gas is $4.00 and less. 0.59	W/E 5/27/2	1.00	-131.62	-131.62	05/27/2022		admin	$-79.57	$0.00
679	Cora M Marvel	Payment for Ledger Item 0.00	Payment fr	1.00	382.59	382.59	05/26/2022	05/26/2022	admin	$52.05	$0.00
678	Cora M Marvel	Payment for Ledger Item 0.00	Payment fr	1.00	40.00	40.00	05/25/2022	05/25/2022	admin	$-330.54	$0.00

Clients can see their Account charges and payments in their ledger.

If they have money kept in a Client Bank Account, they can enter deposits and withdrawals from this page. They can print out a form to have money deposited or withdrawn from the bank account.

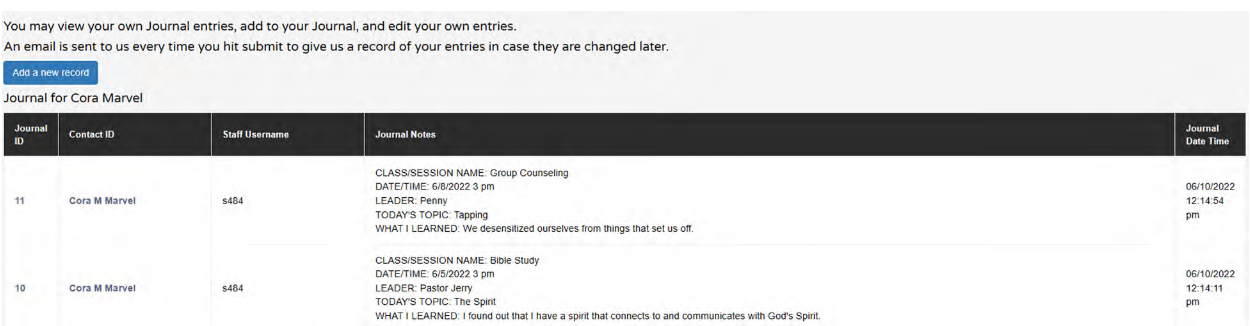
They are shown a running balance for both accounts. One column shows the Operating Account balance (green) and one column shows their Client Account balance (pink).

Add Ledger Item



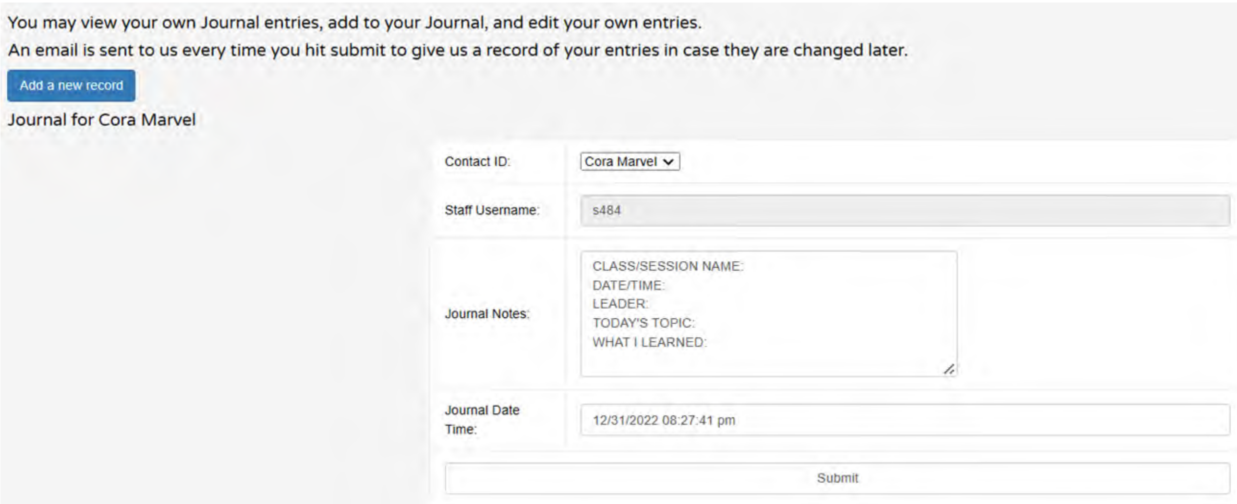
The client can add monetary records to their Ledger.

Client Journal



If you require your clients to keep a journal, there is a digital journal system.

Add Journal



Click Add a new record to add a new Journal entry.

Client Reports

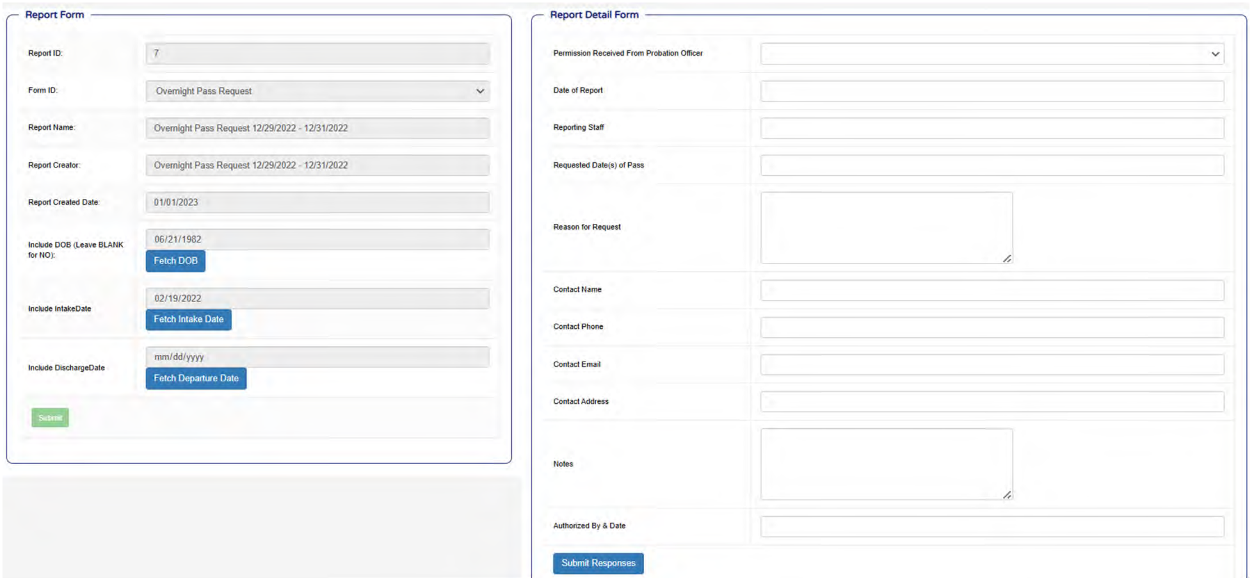
Clients can create Reports from their Dashboard, but they cannot edit them.

Once the Client completes the Report and presses Submit, an email is sent to designated staff to review (and if needed, authorize) the report.

This can be used for Visitation, Passes, Weekly or Monthly Reports, After Care Plans, Grievance forms, etc.

Staff creates these Reports under Forms and assigns the category Client Reports.

Add New Report



Clients complete the box on the left and press submit. Then the additional form fields will show on the right.

Sign In & Out

Clients can sign in and out from their Dashboard. They must provide their Employer information to staff to enter as an Organization with type Client Employer. Then they can select their Employer from the drop down box and it will automatically fill in their location.

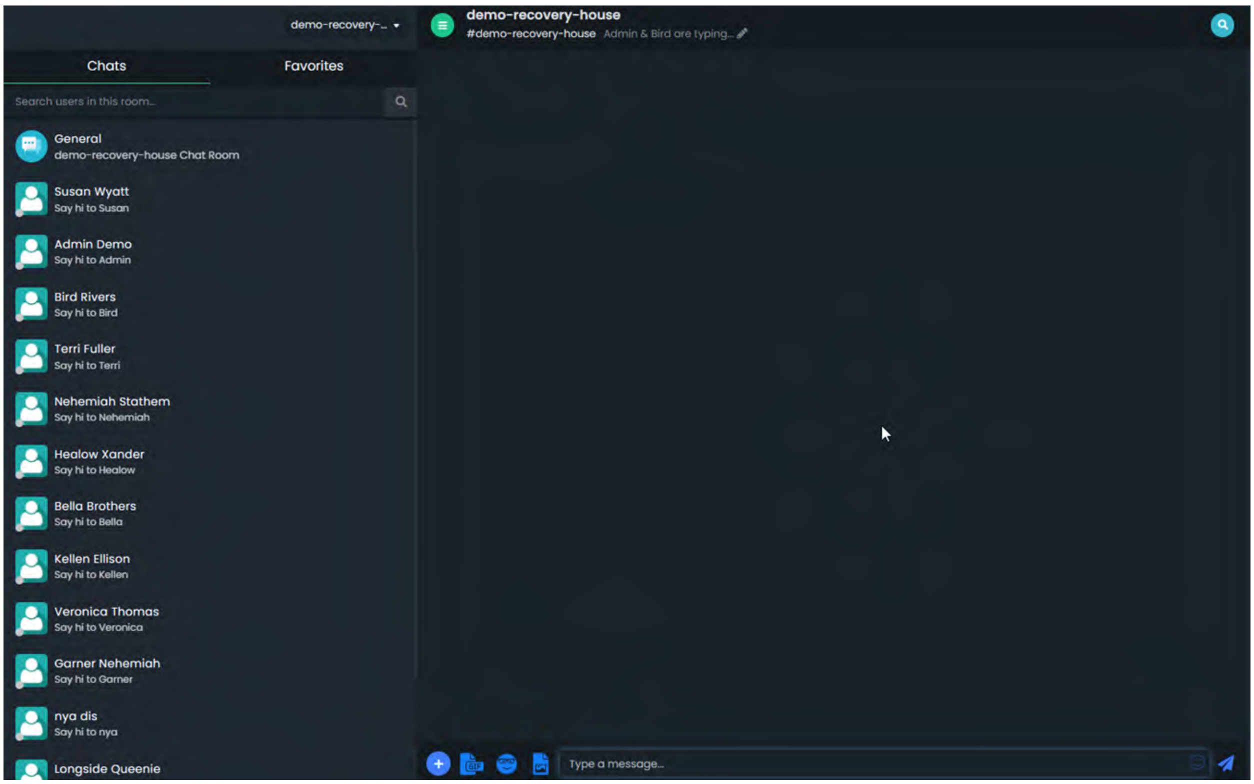
After signing out, the program logs him out of the software.

When he returns, he can log into the program and sign back in.

They can also review their Sign Out History.

Client	Organization	Location	Reason	Departure Date	Sign Out	Arrival Date	Sign In
Cora M Marvel	&d	5 C TR Ga 30175	work	2022-12-31	20:37:24		
Cora M Marvel		Ball ground	Womens church	2022-06-05	17:22:47	2022-06-05	21:39:04
Cora M Marvel		Jasper	Church	2022-06-05	10:12:51	2022-06-05	13:38:32
Cora M Marvel		Jasper	Gym	2022-06-03	08:58:42	2022-06-03	12:17:32
Cora M Marvel		Jasper	Church	2022-06-01	17:42:00	2022-06-02	14:06:54
Cora M Marvel		Jasper	Something	2022-06-01	07:49:48	2022-06-01	12:07:22
Cora M Marvel		Jasper	Work	2022-05-31	08:58:31	2022-05-31	15:04:14
Cora M Marvel		Eljay	Beach	2022-05-30	10:45:42	2022-05-30	19:50:51

Chat Messages

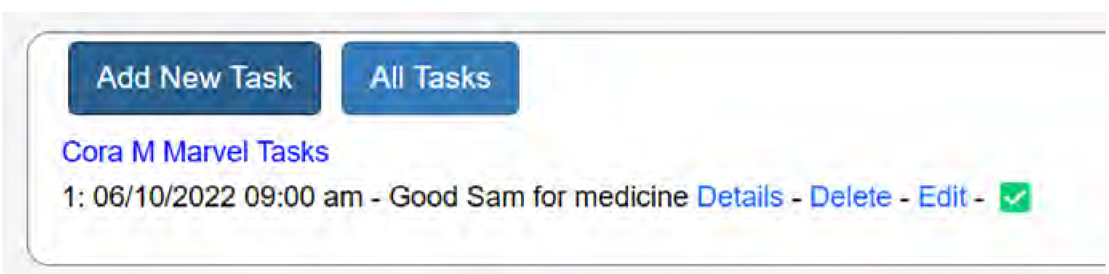


Clients and Staff can use our built in chat system. All chats are saved in the database, so you can get written acknowledgements that are time stamped and confirmed through the HIPAA log.

Chores

Staff can assign Chores to clients. Clients can see the instructions by clicking Details. They can edit the Chore by adding notes to it. They can click on the green Checkbox icon to mark it completed. Staff will then be able to verify chores from the Staff dashboard.

Tasks

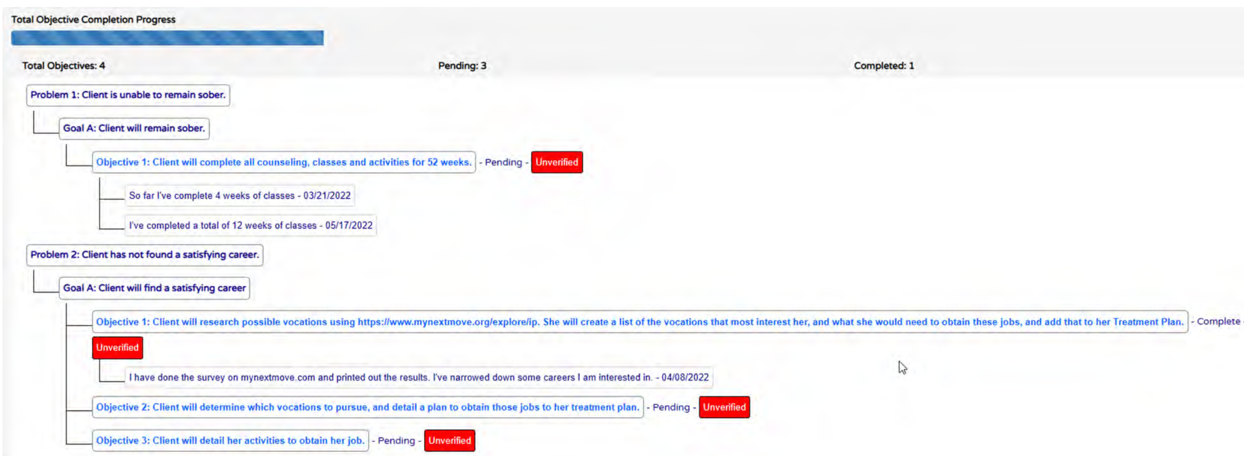


Staff and Clients can create and assign tasks for each other. An example of when a Client might assign a task to Staff is when they have made an appointment and the Staff needs to know about it for scheduling or transportation purposes. Tasks with dates and times show up on the Staff Dashboard Calendar.

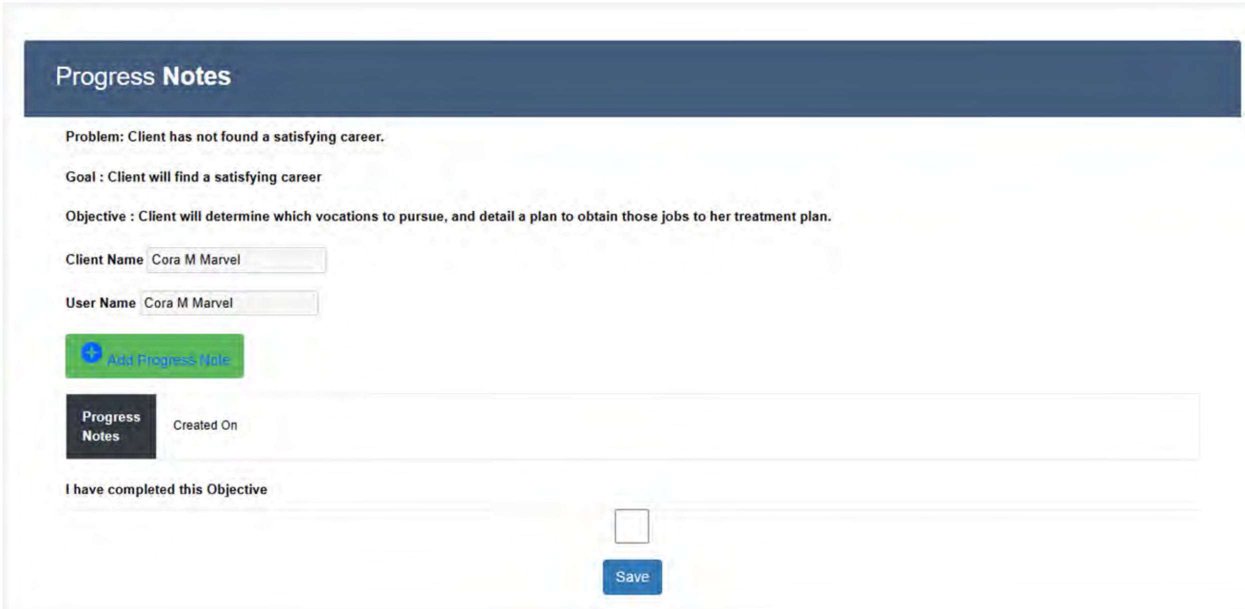
Projects

Staff can assign a Project to a Client. They can then edit the notes or mark it complete.

Treatment Plan



The client's Treatment Plan is always visible on their Dashboard. They can update their Treatment Plan with notes stating how they are working on their objectives. They can mark an objective complete, but it will not officially be complete until Staff confirms it is completed.



Clients click on a blue-linked Objective to add a note to it.

They click the box below **I have completed this Objective** when they finish.

They click Add Progress Note to enter details of how they worked on their objective.

For help, go to https://RecoveryHouseSoftware.com/contact, or call 678-459-2346 x 7.