



**RECOVERY**  
software  
**HOUSE**

**RECOVERY**  
**HOUSE**  
**SOFTWARE**  
**MANUAL**

RPM MINISTRIES INC

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## INTRODUCTION

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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.

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- 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

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- 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.

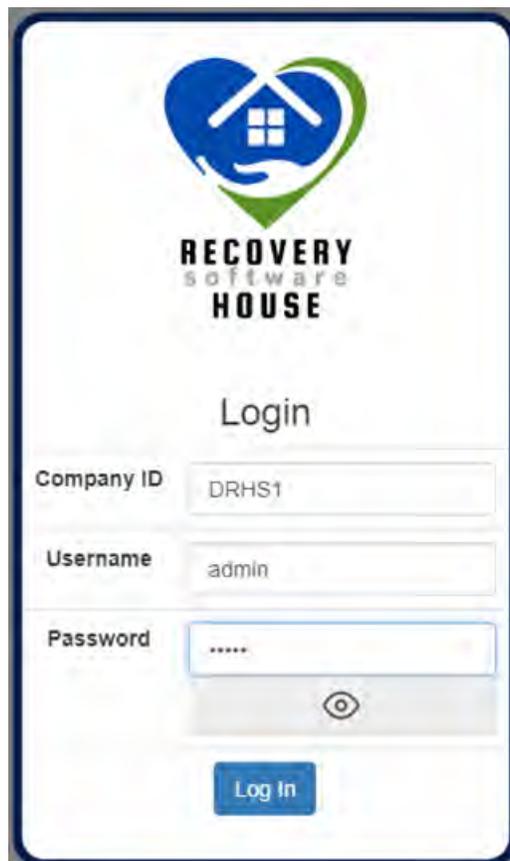
## **Adding Opening Balance for Ledger (Client Account)**

- 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

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Go to <https://rhs.recoveryhousesoftware.com>

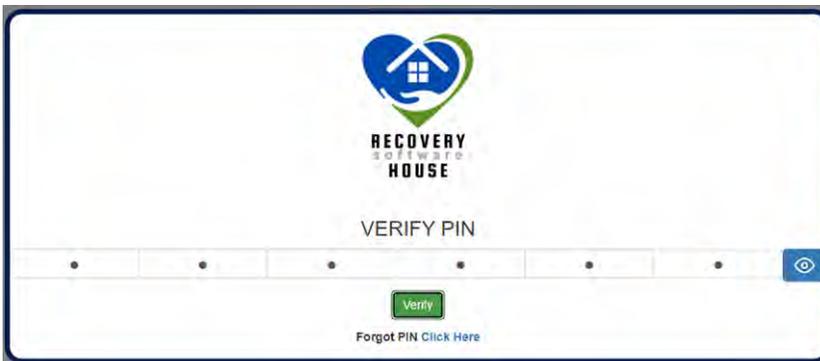


- **Company ID** – We will send the Organization’s Program Administrator a unique Company ID via email, along with an Administrator temporary username, password and PIN which the Administrator can change.

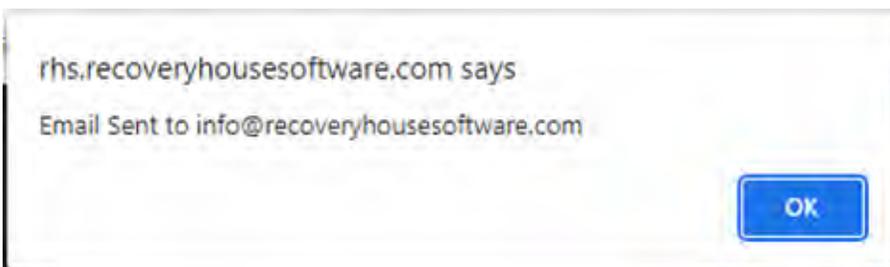
The Program Administrator will create and distribute usernames, passwords and pins for all other Users. The Program Administrator will decide if a user will be forced to create a new password and pin the first time a user logs in.

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- **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”.



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

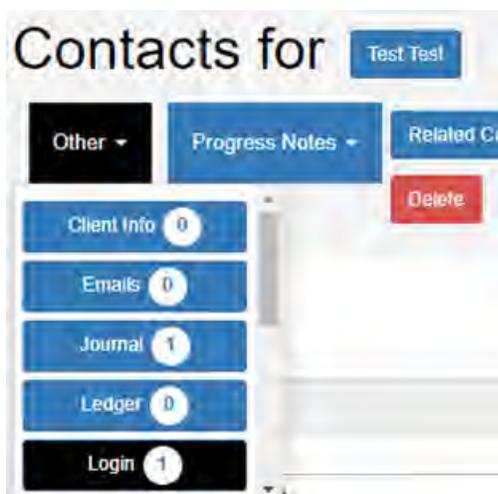
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# RESETTING YOUR PASSWORD AND PIN

---

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.

# Recovery House Software Manual

The screenshot shows a registration form with the following fields and elements:

- Submit:** A green button at the top left.
- LP ID:** A text input field containing the value "91".
- Contact ID:** A text input field containing "Test Test" and a blue "Add" button below it.
- L:** A text input field containing "ttest".
- Password:** A text input field with a strength indicator above it: "Must contain at least one number and one uppercase and lowercase letter, and at least 8 or more characters". The field contains masked characters and a toggle icon (an eye) to the right.
- PIN:** A text input field with a strength indicator above it: "6 Digit numeric PIN". The field contains masked characters and a toggle icon (an eye) to the right.
- Reset:** A checkbox that is checked, with a checkmark icon to its right.

- 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.

This is a close-up of the Password field from the previous screenshot. It shows the strength indicator: "Must contain at least one number and one uppercase and lowercase letter, and at least 8 or more characters". The password field contains the encrypted string: "6435b1d26a96a2c78a0a0e242eb1386dc030ad805b6c8afc030ed6749b0a7b72". A toggle icon (an eye) is visible to the right of the field.

- 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.

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## User Instructions

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

**Warning! Please Reset Your Password**

Please reset your password and pin to use system.

New Password: Must contain at least one number, one uppercase and lowercase letter, one special symbol (~!@#\$\$%^&\*()\_+=-) and at least 8 or more characters example: Abs@913!

**Correct!**

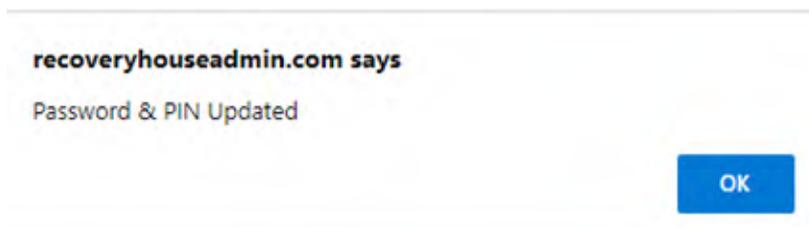
..... 

Confirm Password: .....

New PIN

**Reset Now**

- **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.

## Recovery House Software Manual

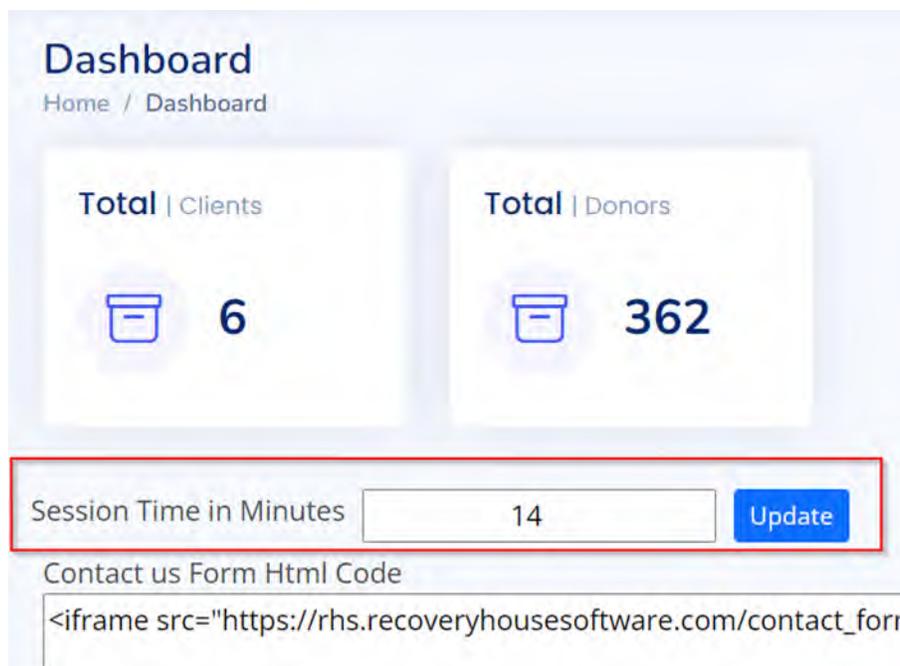
- You will return to the Login page where you will use your new Password and PIN.

## SESSION TIME OUT

### HIPAA Required Time Out of Sessions

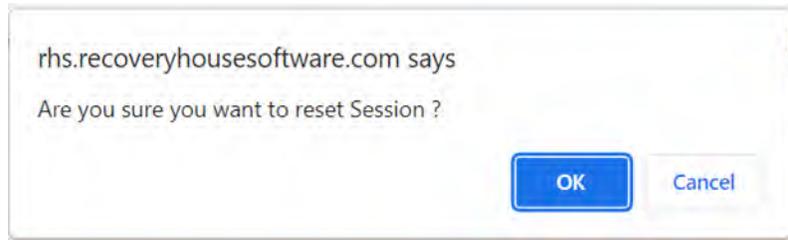
Whenever you log into a web site, it keeps track of how long you stay logged into the program. HIPAA privacy requirements include limiting the amount of time your session can remain open if you are not active on a page. This helps limit the opportunity for unauthorized access to the protected information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

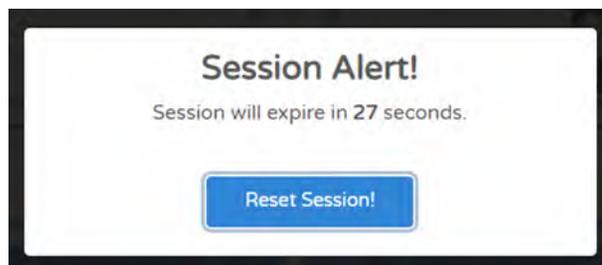


You can reset the session at any time using the circle with 2 arrows above the menu, next to the Session Time countdown box. It will ask you to confirm if you want to reset the session.

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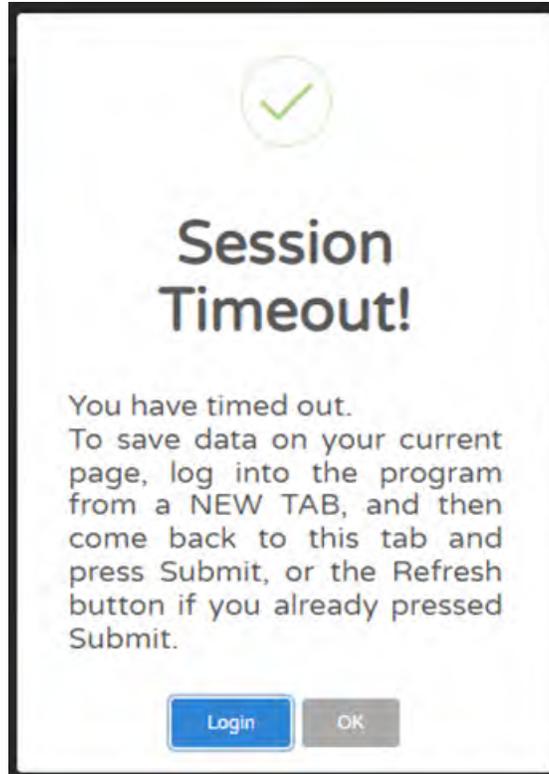


**After the session time expires, you see a popup screen that will give 30 seconds to reset the session.**



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

## Recovery House Software Manual



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.

***Your session has timed out.  
To save submitted data:  
Click to Login on another tab.  
Then click Refresh on this page to resubmit your data.***

**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.

## Recovery House Software Manual

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

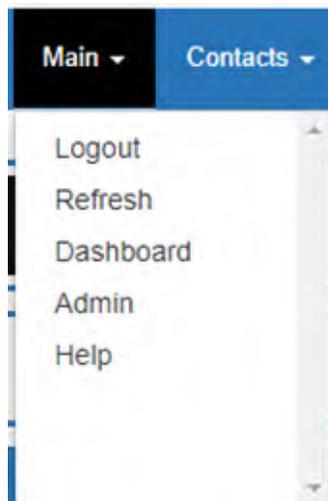


## MENUS

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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.

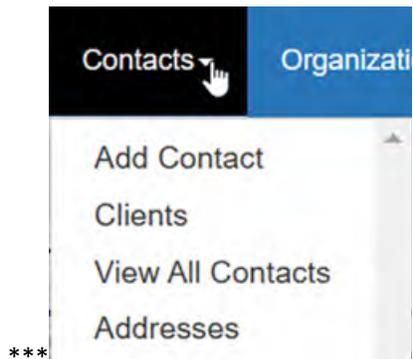
Main



- **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.

# Recovery House Software Manual

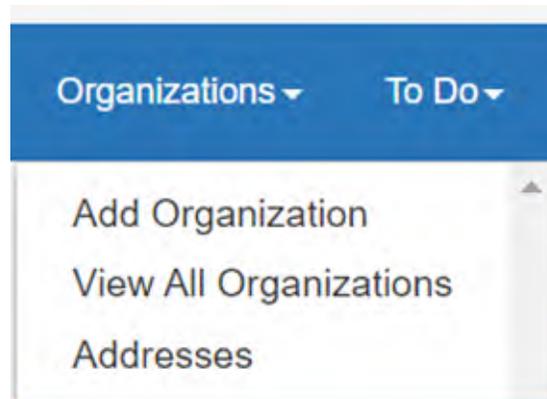
## Contacts



- **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

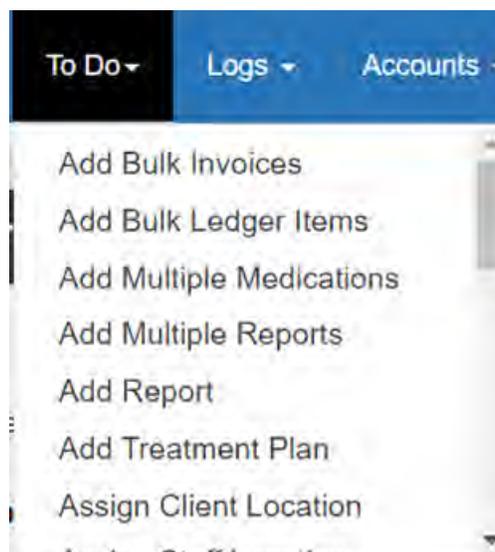
# Recovery House Software Manual

## 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.

# Recovery House Software Manual

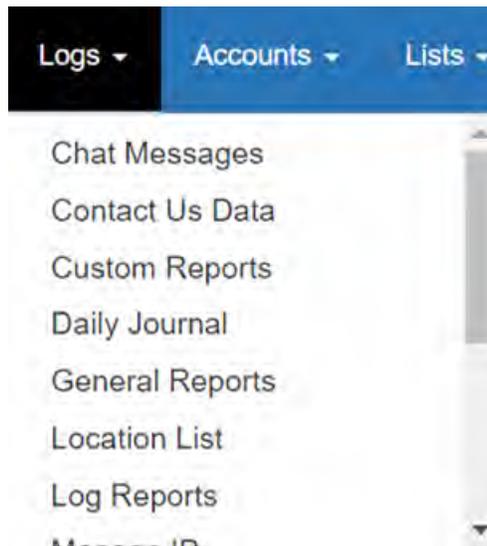
- **Add Bulk Invoices** – Create, review, save, upload and email invoices for any or all clients at one time from one page
- **Add Bulk Ledger Items** – Add Ledger charges for any or all clients from one page
- **Add Multiple Medications** – Log Medication Administration for multiple clients and medications 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.

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- **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.

# Recovery House Software Manual

## Logs



The list of options may change.

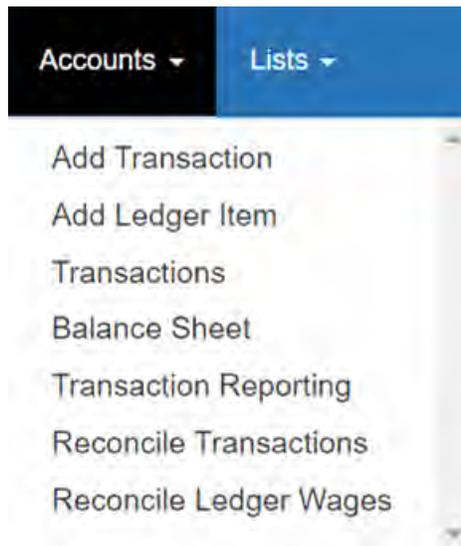
- **Chat Messages** - View, Search, Filter, Export, Print and Edit Chat Messages.
- **Contact Us Data** – Submissions from the Contact Us form that create Client Prospects.
- **Custom Reports** – Select a Custom Report to View, Search, Filter, Export, Print and Edit the results.
- **Daily Journal** – 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.

## Recovery House Software Manual

- **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

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## Accounts

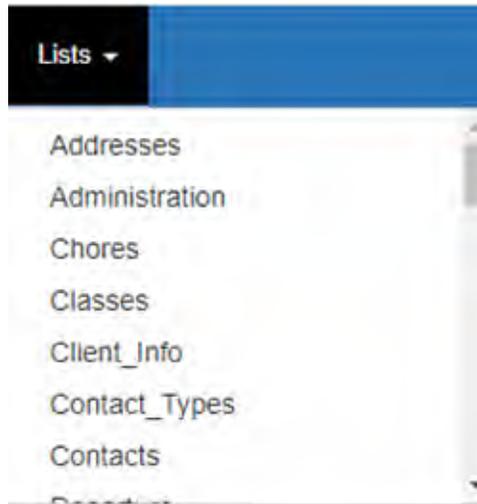


The list of options may change.

- **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.

# Recovery House Software Manual

## 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.\*\*\***

# Recovery House Software Manual

## DASHBOARD

Session Time 12 : 13

Main -> Contacts -> Organizations -> To Do -> Logs -> Accounts -> Lists -> Search Contacts

Filter By Location  
View All

Signed In: [User Avatars] Signed Out: [User Avatar]

Clients Without Journals 12/01/2022.  
e88[0], r114[0], s484[0], s517[0], s557[0], y521[0].

0 Unread Chat Message(s) 0 Progress Notes Added in Last 7 Days 0 Objectives Completed in Last 14 Days 0 Tasks Due Today 0 Chores Due Today 12 Chores To Be Verified 1 Contact Requests

Add New Message All Messages  
1. 06/10/2022 09:50 am Harold - He needs to speak to you asap. (Admin Demo) - 06/10/2022 Details - Delete - [X]

Invalid address: (to):

Add New Task All Tasks  
Task Added  
Admin Demo Tasks  
1. 06/09/2022 10:30 am - Test Task from Admin Details - Delete - Edit - [X]  
2. 06/10/2022 - Test Task 1 Details - Delete - Edit - [X]  
3. 06/10/2022 10:30 am - Test Task from Admin Details - Delete - Edit - [X]  
4. 06/24/2022 - Test Task 2 Details - Delete - Edit - [X]  
5. 12/09/2022 - Family Recovery Details - Delete - Edit - [X]  
na ool Tasks from

December 2022  
month week day list

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8 Family Recovery Family Recovery	9	10
11	12	13	14	15	16	17

### Session Time

Session Time 14 : 17

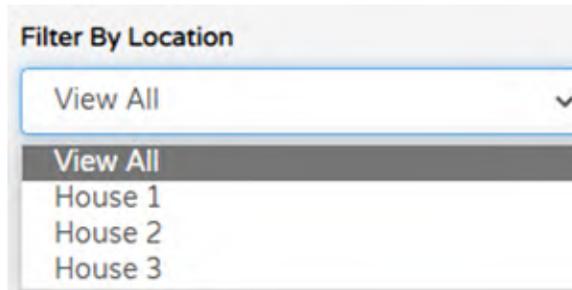
Reset session

Main -> Contacts ->

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.

# Recovery House Software Manual

## 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.

# Recovery House Software Manual

## Client Sign In Details for

Organization Name	
Organization Phone	
Location	601 Moore Rd, 2, Bed Number: 2
Reason	church
Sign Out Date & Time	05/16/2023 06:01 PM
Estimated Return Date & Time	05/16/2023 07:30 PM
Sign In Date & Time	05/16/2023 09:07 PM

[Client Profile](#)

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

**Clients Without Journals 04/17/2023.**  
bird[0], cora[0], garner[0], susan[0], terri[0], veronica[0],

# Recovery House Software Manual

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



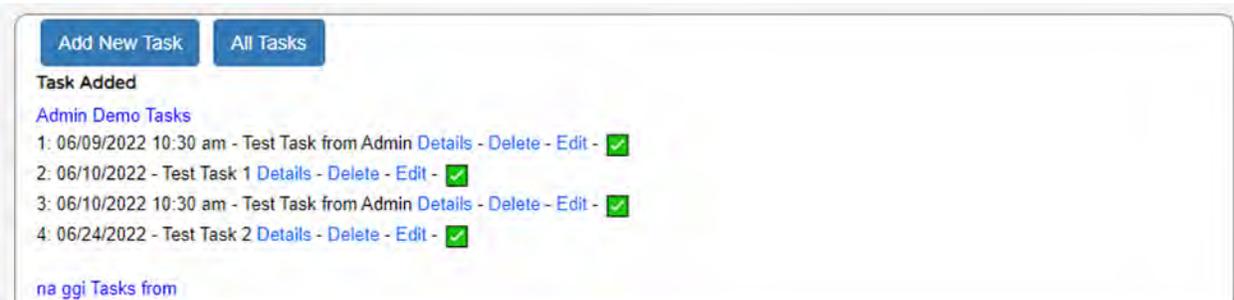
# Recovery House Software Manual

- **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.

# Recovery House Software Manual

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

## Projects



The screenshot shows a box titled "Projects". Below the title, it says "Admin Demo Projects" and "1: Test Project Details - Edit" with a green checkmark icon.

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

## Chores



The screenshot shows a box titled "Chores". At the top, there are two buttons: "Assign Chore" and "All Chores Assigned". Below the buttons, it says "dy int Chores from" and lists three items: "1: 06/08/2022 Single Bathroom Details - Edit - Delete" with a green checkmark, "2: 06/08/2022 House Details - Edit - Delete" with a green checkmark, and "3: 06/08/2022 Dishes Details - Edit - Delete" with a green checkmark.

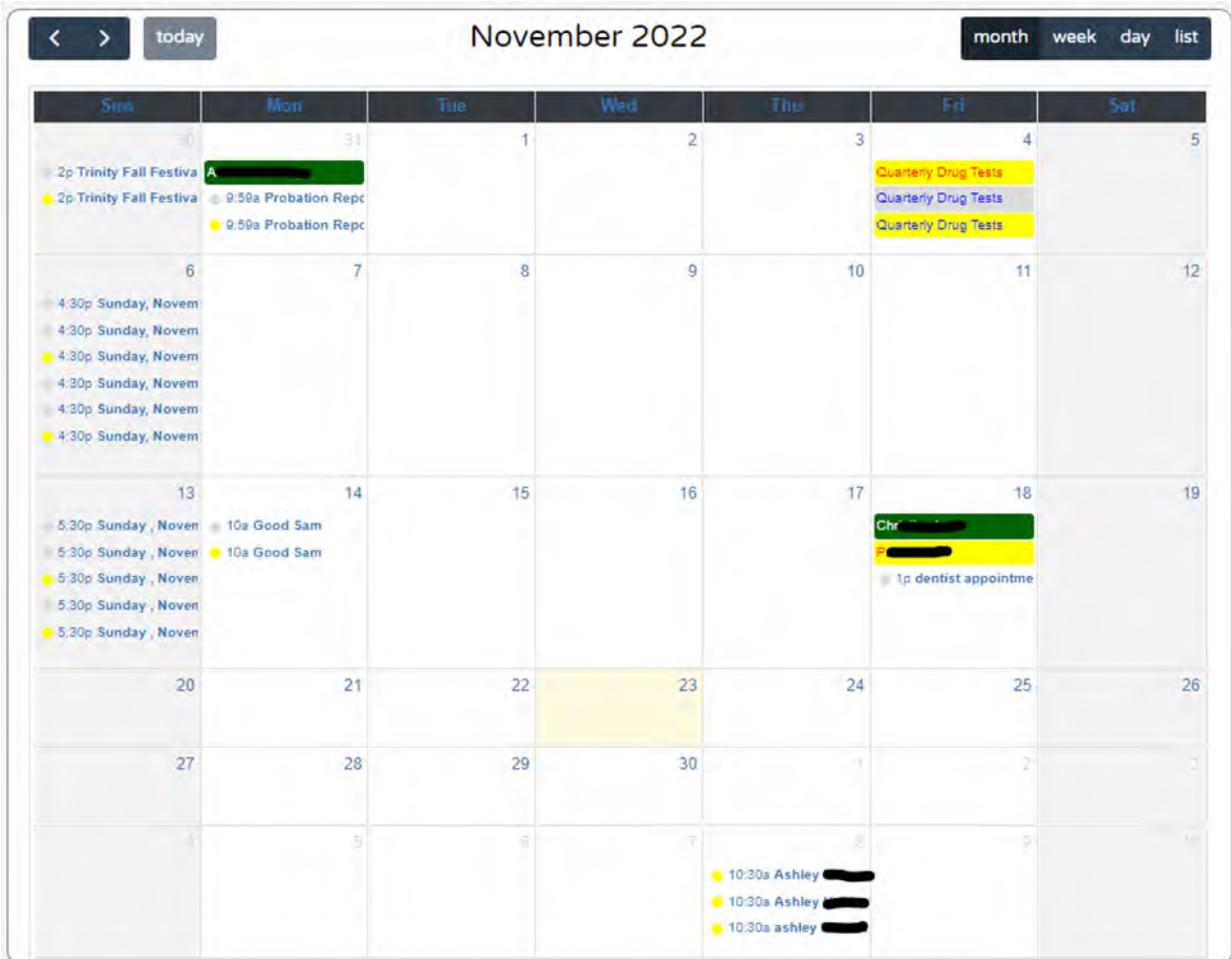
- **Assign Chore** – Assign chores to Clients and Staff. You can only assign one chore at a time, but you can assign more than one date and peron to a Chore.

# Recovery House Software Manual

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.

## Recovery House Software Manual

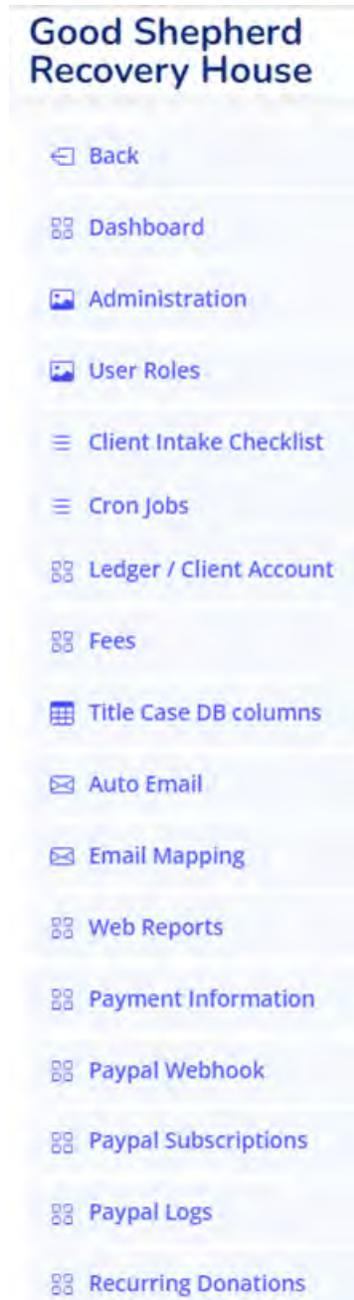
- **Red Font** – Task belongs to the current User.
- **Blue Font** – Task belongs to someone other than the current User.

---

# ADMIN DASHBOARD

---

# Recovery House Software Manual



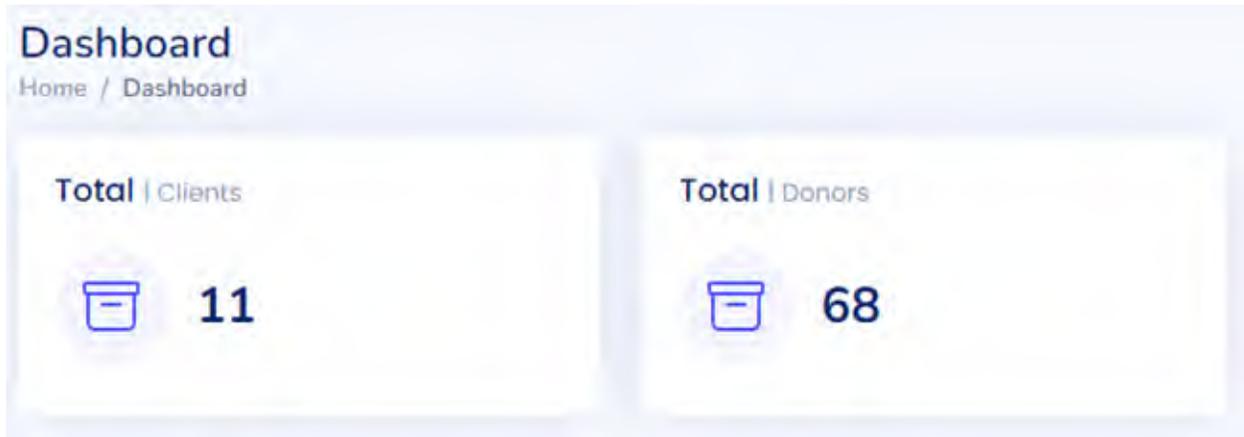
The list of options may change.

Back

This takes you back to the Main Dashboard.

# Recovery House Software Manual

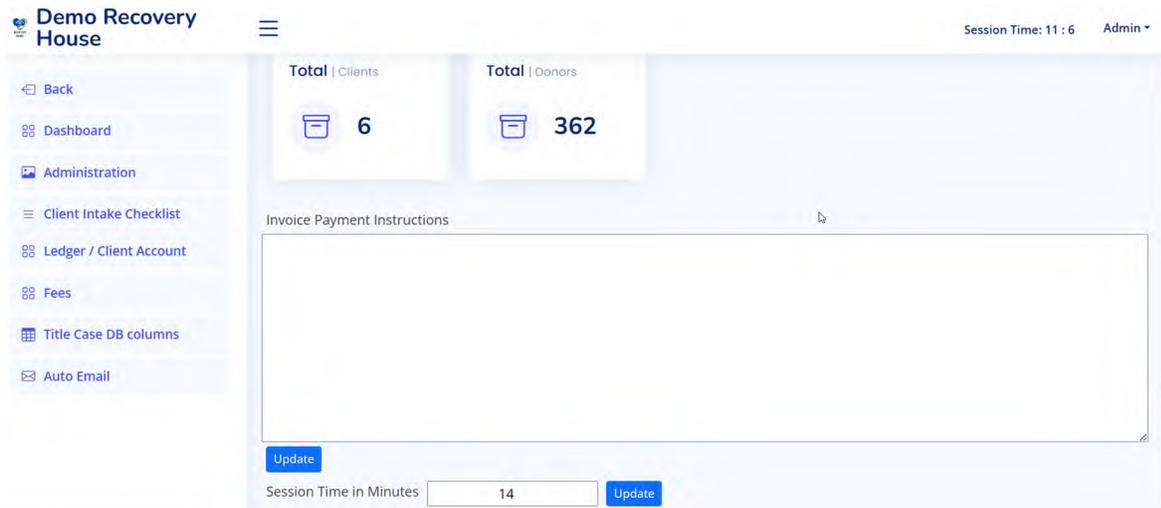
## Dashboard



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

# Recovery House Software Manual

## Invoice Payment Instructions



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

# Recovery House Software Manual

## 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

```
<a href="https://rhs.recoveryhousesoftware.com/contact_form.php?id=DRHS1" target="_blank"><h2>New Client Inquiry Form</h2></a>
```

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: \***

 ⓘ  
Drug(s) of Choice is required.

**Incarceration Location (City, County, State): \***

 ✓

# Recovery House Software Manual

### 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:

# Recovery House Software Manual

**Person Inquiring**

**Name: \***

Name is required.

**Phone: \***

Phone is required.

Email:

Where did you hear about us? \*

required.

**Message: \***

Message is required.

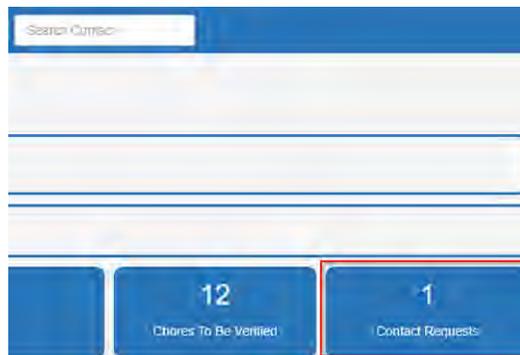
Upload Document (doc, docx, pdf, jpg, png)

Choose File No file chosen

I'm not a robot

submit

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.

# Recovery House Software Manual

## Contact Data

Client	Sponsor	Emergency Contact	Supervising Officer	Lawyer	Person Inquiring	Message	Other	Action
Fiona Bird 02/04/1989 Heron Cherokee County, GA	Raley House 111-222-3333 me@me.com	Raley House 111-222-3333 me@me.com	Officer Walker 777-777-7777 ow@email.com		Raley 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: <a href="#">Upload Lucy Shookoff.pdf</a>	<a href="#">Mark Read</a> <a href="#">Delete</a>
Kristle Madden math Barlow Co., GA	indigent indigent	n 5555555555	Sarah Paris 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	<a href="#">Delete</a>

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

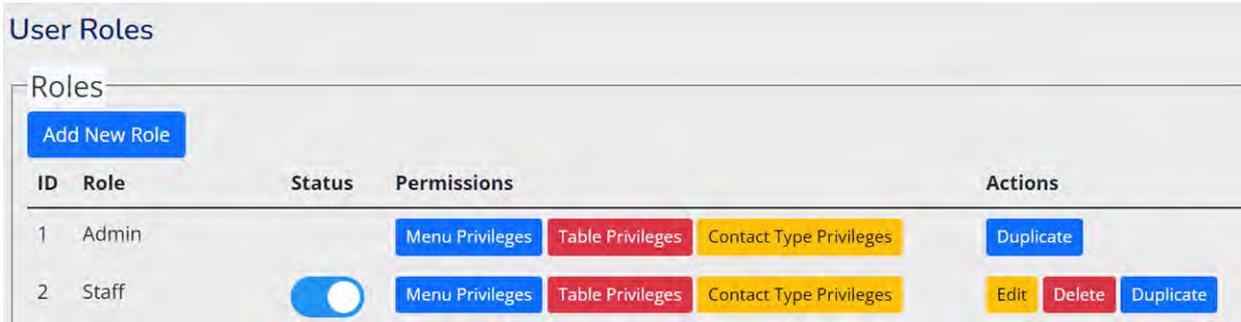
Organization Name	EIN	Year Founded
<input type="text" value="Demo Recovery House"/>	<input type="text" value="99-12345678"/>	<input type="text" value="2007"/>
Executive Director	Mission	Mailing Address
<input type="text" value="John Doe"/>	<input type="text" value="Our mission is to provide support,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

# Recovery House Software Manual

## 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

Administration

Client Intake Checklist

PRINT OUT THIS LIST and keep it visible until ALL items are completed. Then scan and upload to client Uploads and place original in client folder.

\_\_\_\_ Medication Reviewed

DOES THE CLIENT REQUIRE MEDICATION? YES NO

- Medications they require:

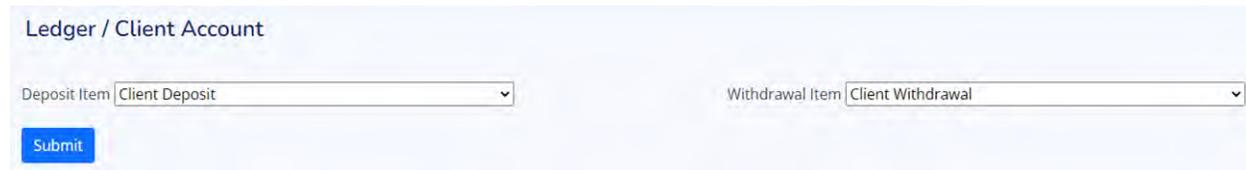
- Number of doses they currently have:

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

# Recovery House Software Manual

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



The screenshot shows a form titled "Ledger / Client Account". It contains two dropdown menus: "Deposit Item" with "Client Deposit" selected, and "Withdrawal Item" with "Client Withdrawal" selected. Below the dropdowns is a blue "Submit" button.

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

# Recovery House Software Manual

Fees / Setup

Basic Program Fees \$

Documented Program 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

Change Database Columns to Title Case

Select Table

Select Column Name

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.

# Recovery House Software Manual

## Auto Email

**Define Auto Email Configuration**

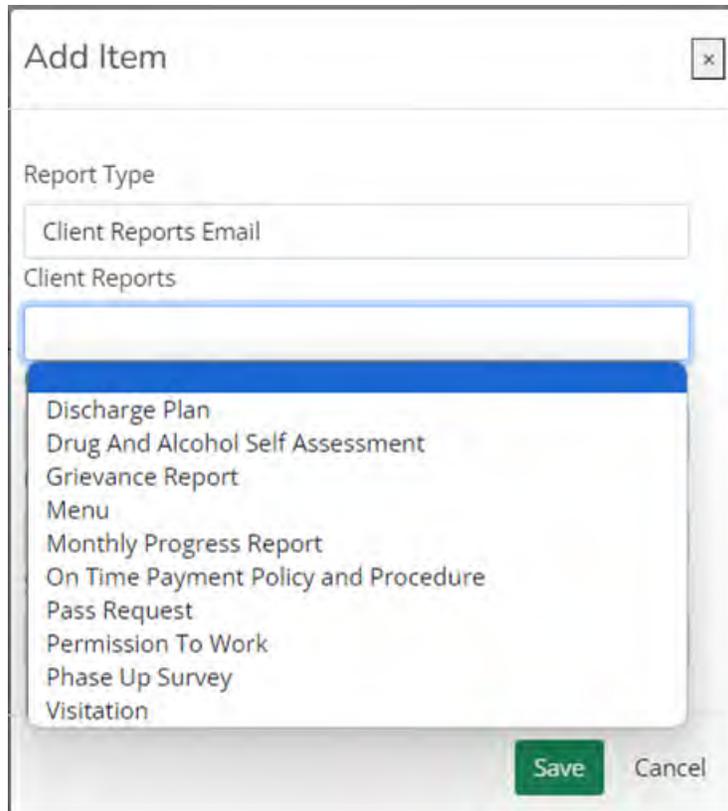
Client Reports Email	Daily Records Email
<input type="text" value="hsusa@mail@recoveryhouse.org"/>	<input type="text" value="info@recovery.org"/>
Prospect Weekly Email	Clients Without Journal Entries Email
<input type="text" value="info@recovery.org"/>	<input type="text" value="hsusa@mail@recoveryhouse.org"/>
Contact Type Change Email	Web Reports Email
<input type="text" value="hsusa@mail@recoveryhouse.org"/>	<input type="text" value="info@recovery.org"/>
Current Client Information Email	Current Transitional Client Information Email
<input type="text" value="info@recovery.org"/>	<input type="text" value="info@recovery.org"/>
Tasks Due Email	Chores Due Email
<input type="text" value="perry@perry@recoveryhouse.org"/>	<input type="text" value="hsusa@mail@recoveryhouse.org"/>
Donation Letter Email	
<input type="text" value="Perry@perry@recoveryhouse.org"/>	

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.



# Recovery House Software Manual



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.

# Recovery House Software Manual

## Payment Information

The screenshot shows the 'Payment Information' form. On the left is a navigation sidebar with items like 'Back', 'Dashboard', 'Administration', 'User Roles', 'Client Intake Checklist', 'Cron Jobs', 'Ledger / Client Account', 'Fees', 'Title Case DB columns', 'Auto Email', 'Email Mapping', 'Web Reports', and 'Payment Information' (highlighted). The main form area is titled 'Payment Information' and contains a 'Web Payment Link' field with a 'Copy to Clipboard' button. Below this are 'Paypal Fees' fields: 'Paypal Per Transaction Fee' (0.49), 'Paypal Percentage' (3.00), and 'Email for Paypal notifications'. There are also fields for 'Live Paypal Client ID', 'Live Paypal Secret Key', 'Sandbox Paypal Client ID', and 'Sandbox Paypal Secret Key'. At the bottom, there is a 'Paypal Mode' section with two radio buttons: 'Live' (selected) and 'Apply the Net Payment to the Client Ledger'. An 'Update' button is located to the right of the radio buttons.

The screenshot shows the 'Items' table. At the top left is an 'Add New Item' button. Below it is a 'Mark All' button. The table has columns for 'Item Name', 'Item Price', 'Price With Paypal Fees', 'Category', and 'Action'. There are four rows of items, each with a checkbox and 'Edit' and 'Delete' buttons. Below the table are 'Update Fees' and 'Delete' buttons.

	Item Name	Item Price	Price With Paypal Fees	Category	Action
<input type="checkbox"/>	Test item	\$1.99	\$2.52	Office Supplies	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	Background Check	\$35.00	\$36.19	Programs and Counseling Income	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	Medical Fees	\$100.00	\$102.49	Resources for Programs and Counseling	<a href="#">Edit</a> <a href="#">Delete</a>
<input type="checkbox"/>	Program Fees	\$1,000.00	\$1,020.48	Resources for Programs and Counseling	<a href="#">Edit</a> <a href="#">Delete</a>

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.

## Recovery House Software Manual

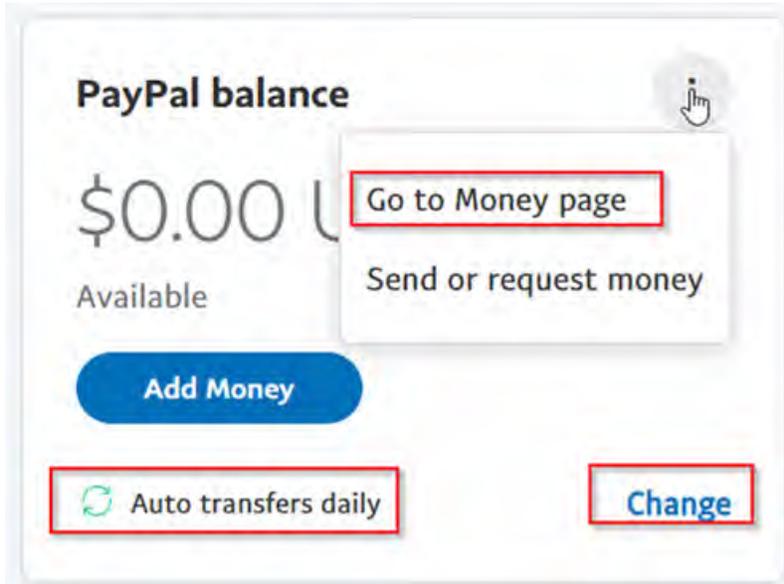
If you are NOT adding Paypal Fees, but are applying the full payment to the Client Ledger, then select GROSS.

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).

# Recovery House Software Manual

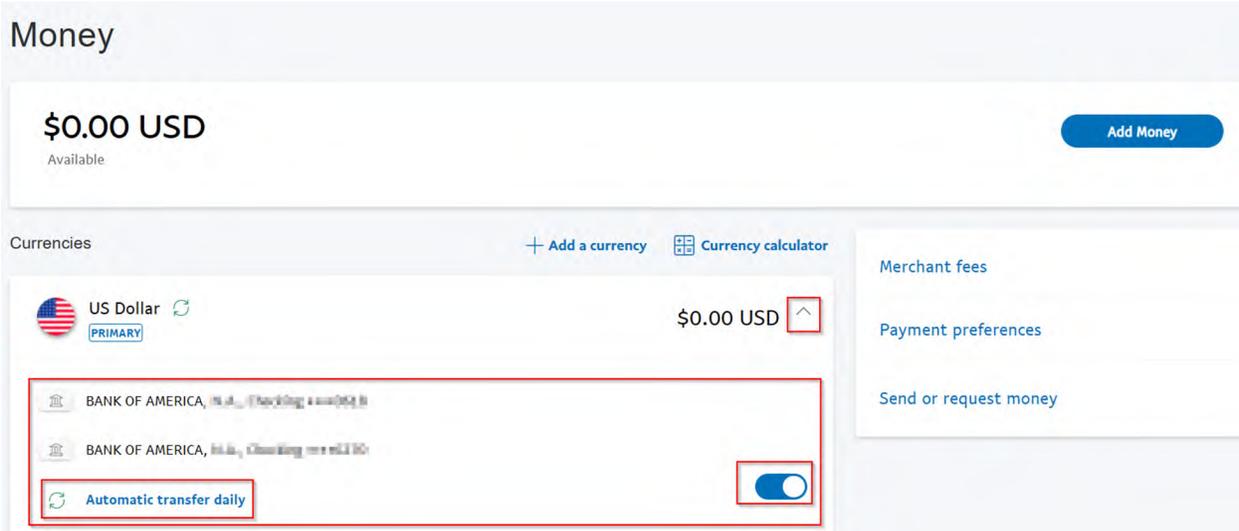
## Paypal Auto Transfer



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.



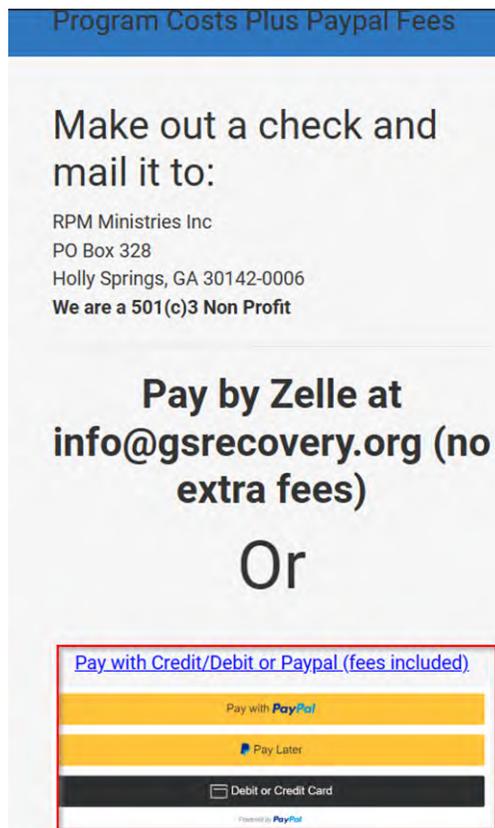
# Recovery House Software Manual

## 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.)*



# Recovery House Software Manual

## Paypal Fees

Paypal Fees

Paypal Per Transaction Fee: 1.00

Paypal Percentage: 2.00

Email for Paypal notifications: recoveryhouse@gmail.com

Live Paypal Client ID: [Redacted]

Live Paypal Secret Key: [Redacted]

Sandbox Paypal Client ID: [Redacted]

Sandbox Paypal Secret Key: [Redacted]

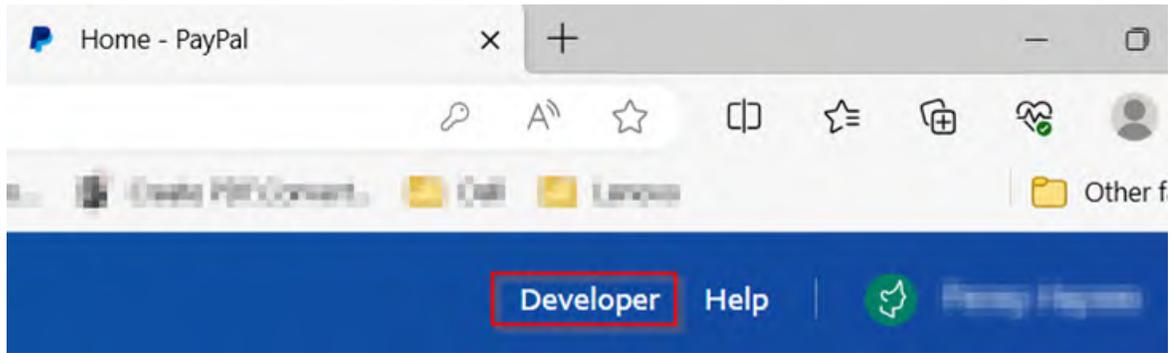
Paypal Mode:

In this section, you can

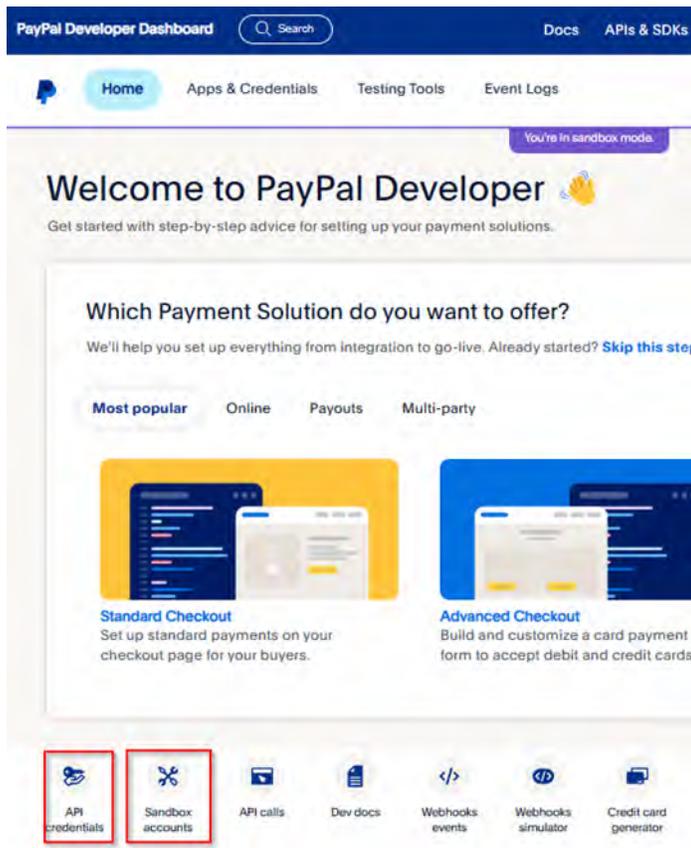
- 1) Add Paypal fees that can be added to your prices to cover the merchant fees. You can enter your Paypal Transaction Fee and Percentage, but it may be a little short. So play with the combination of fee and percentage until it covers your fees. Your clients only see the TOTAL fee that is added, not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

# Recovery House Software Manual

## 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.





# Recovery House Software Manual

PayPal Developer Dashboard

Home **Apps & Credentials** Testing Tools Event Logs

Sandbox  Live

## API Credentials

**Create App**

REST API apps

App name	Client ID	Secret	
Default App	AKV7gaxzq3p8t2mfev7y8_v7j2d3V...	.....	

Express Checkout via Braintree SDK - Live Account

- 1) Click Create App

## Create App

App Name

As a reminder, all apps created under your account should be related to your business and the type of business it conducts.

By clicking the button below, you agree to [PayPal Developer Agreement](#) (US accounts only).

**Create App**

- 2) Enter your Business Name.
- 3) Click Create App

# Recovery House Software Manual

[← Back](#)

## Jesus Text Me 2

Note that not all features are available for live transactions. Features available for live transactions are listed in your [account eligibility](#).

### API credentials

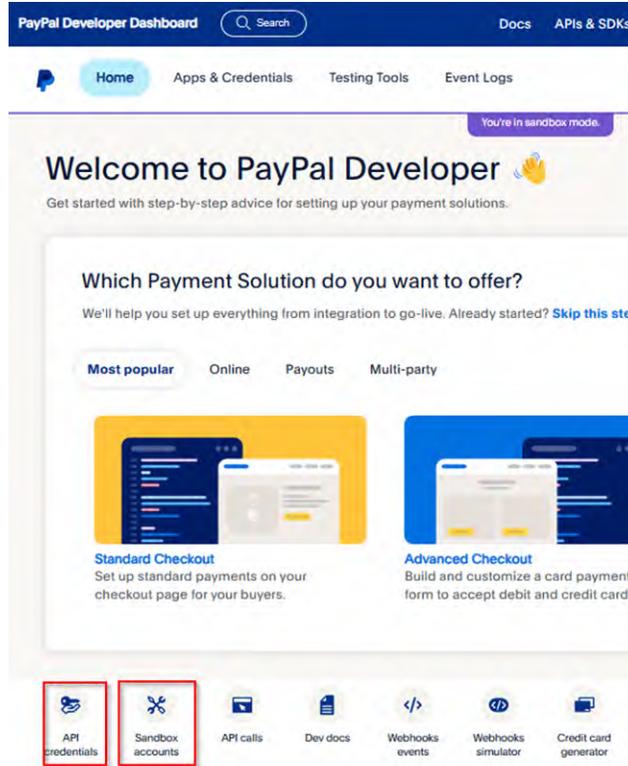
App name	Jesus Text Me 2 
Client ID	AKG28WVXG8C8E-LY5DTE-uPLVH3PLM3Q3yR2H F8w28w8V7yC2d3Pw7Lj5gn4H8r9g4H2Lm 
Secret key 1	.....   

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

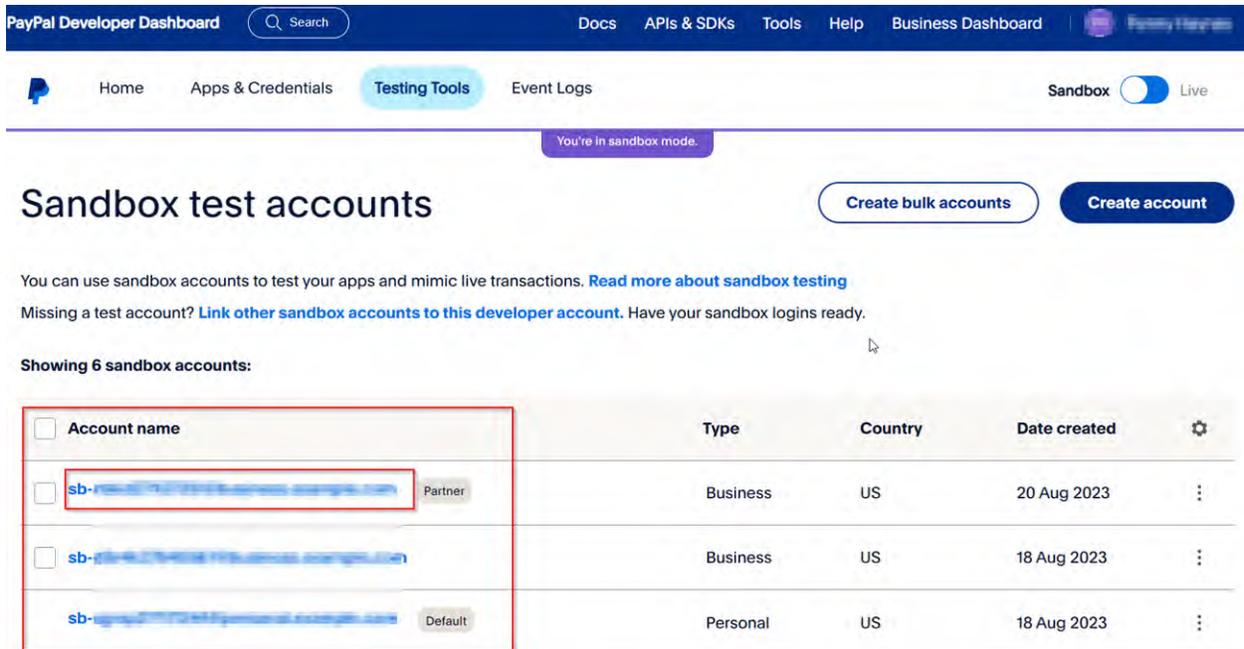
There is a Paypal Mode drop down box below those fields where you select if you want to use Live or Sandbox right now. You can change it back and forth.

Emails to use with your Sandbox Account

# Recovery House Software Manual



Click Sandbox Accounts.



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

# Recovery House Software Manual

← [Back](#)

## sb-rbkid27107351@business.example.com

### Login Info

---

Sandbox URL <https://sandbox.paypal.com> 

Email  

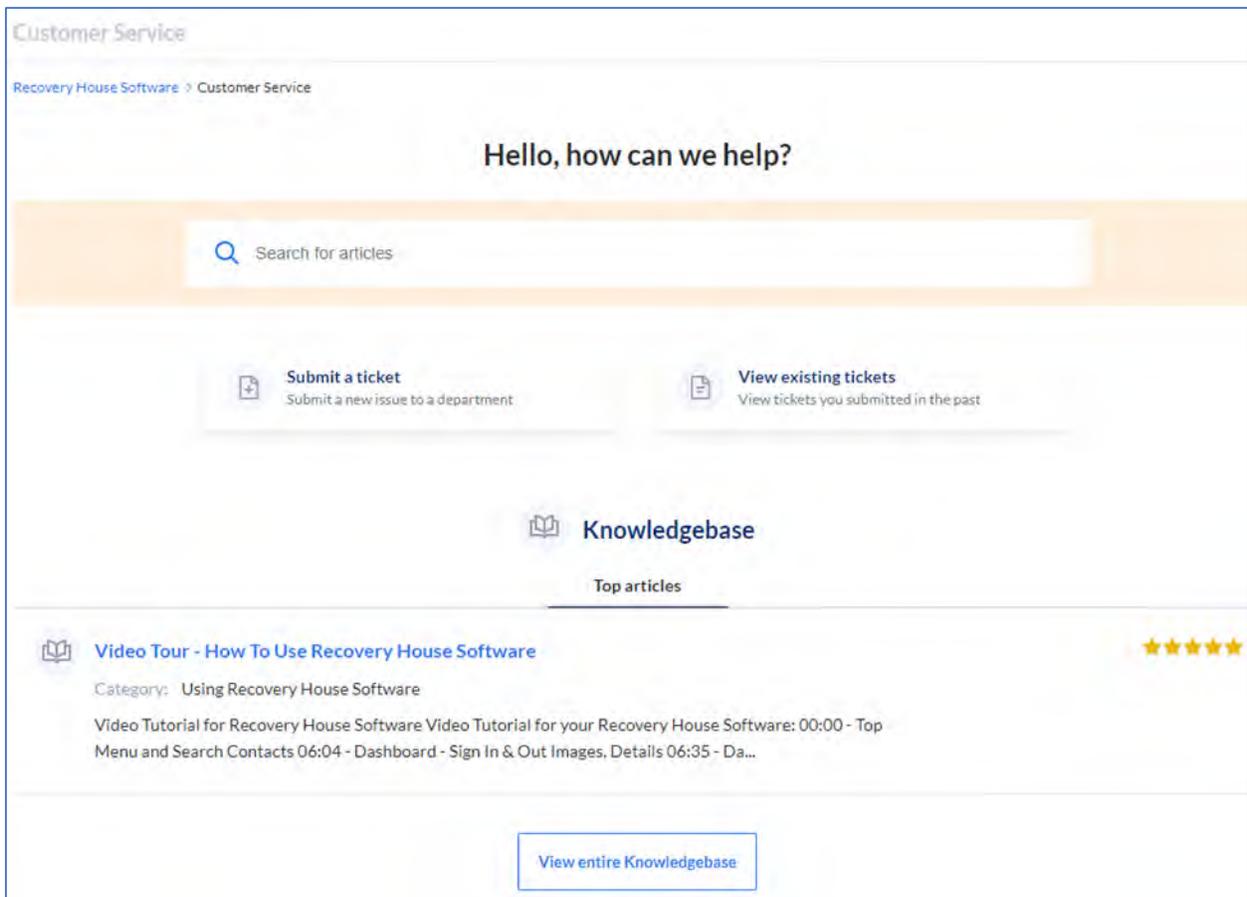
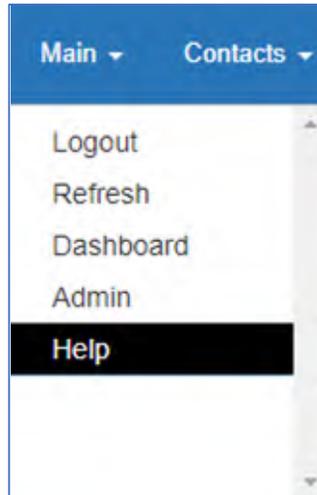
Password    [Change password](#)

---

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.

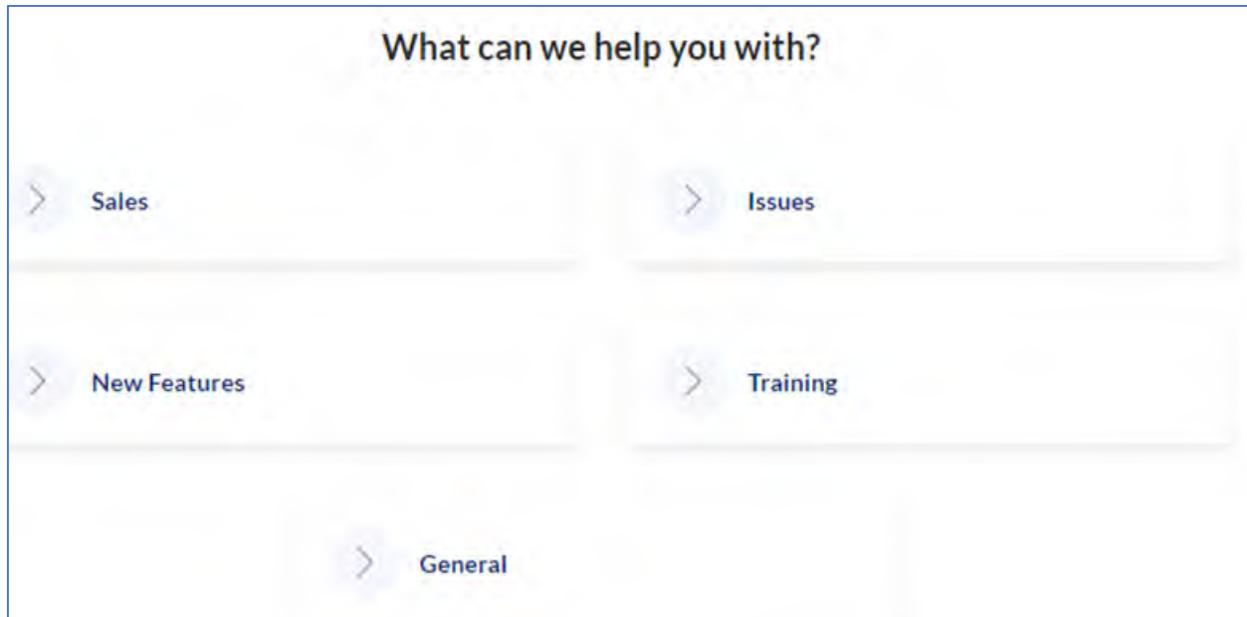
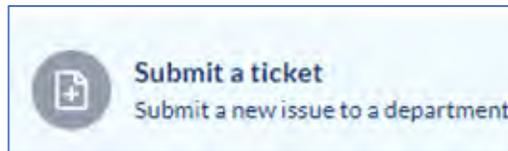
Save it somewhere to re-use for each test purchase.

# HELP



# Recovery House Software Manual

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.

# Recovery House Software Manual

## View Existing Tickets

**View existing tickets**  
View tickets you submitted in the past

**View existing ticket**

Ticket tracking ID \*

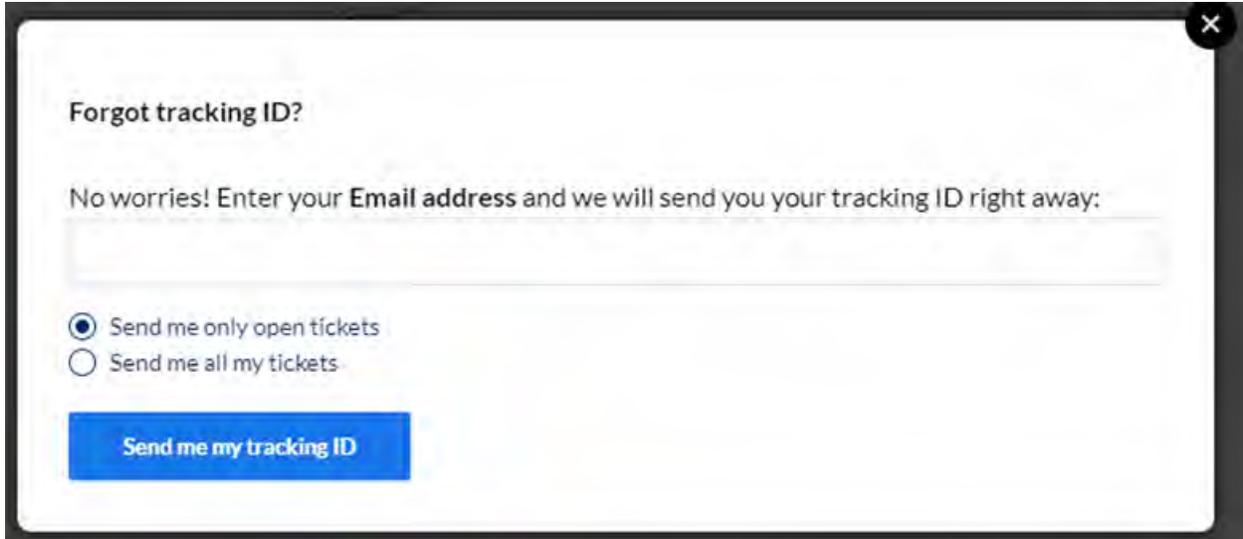
Email \*

Remember my email address

**View ticket**

[Forgot tracking ID?](#)

# Recovery House Software Manual



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

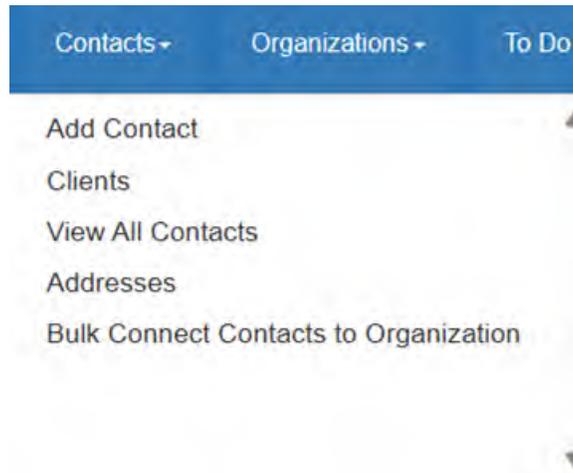


You can watch videos and articles about how to use the software.

# CONTACTS

---

Add Contact



# Recovery House Software Manual

Contact Type: Staff [Add]

First Name **REQUIRED**: [ ]

Middle Name: [ ]

Last Name **REQUIRED**: [ ]

Suffix: [ ]

Title: [ ]

Location: [ ]

Address: [ ] [Add]

Mailing Address: [ ] [Add]

Primary Phone: [ ]

Primary Email: [ ]

Contact Notes: [ ]

Contact Source: [ ]

Organization: [ ] [Add]

Staff Username: phaynes

Contact Created Date: 04/09/2024

User Role: [ ]

Related Contact: [ ] [Add]

Custom Field: [ ] [Add]

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

Then you can Add 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.

# Recovery House Software Manual

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

Suffix:

Title:

Location

Address ID:

Mailing Address ID:

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

## Contact Page

# Recovery House Software Manual

[Add a new record](#)



## Contacts for [Bird Rivers](#)

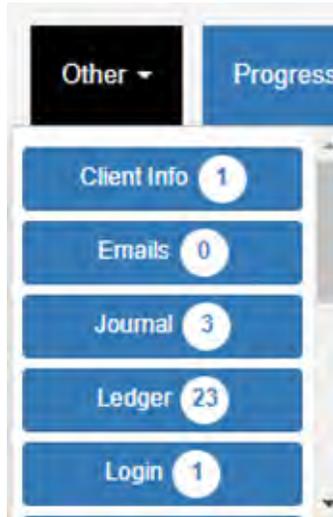
[Other ▾](#) [Progress Notes ▾](#) [Related Contacts](#) [Uploads](#) [Create Organization](#)

**Expected Graduation Date:** 10/11/2022  
**Departure Date:**  
**Intake Date:** 10/11/2021  
**Birth Date:** 08/28/1954  
**Emergency Contact:** [Anthony Stathem](#)  
**Supervising Officer:**  
**Supervising Officer 2:**  
**Supervising Officer 3:**  
**Lawyer:**

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

# Recovery House Software Manual

## 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 2<sup>nd</sup> 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	<a href="#">9V.Int</a>	08/28/1954	10/11/2022	Female	White	<a href="#">93.Int</a>	<a href="#">96.Int</a>	<a href="#">91.Q</a> <a href="#">95</a>					Alcohol				10/11/2021				admin

# Recovery House Software Manual

Client Info :	27
Contact :	Cora M Marvel <span>Edit</span> <span>Add</span>
Level:	1
Birth Date:	09/21/1982
Expected Graduation Date:	02/18/2023
Gender:	Female
Race :	African American <span>Edit</span> <span>Add</span>
Emergency Contact :	Dora Brothers <span>Edit</span> <span>Add</span>
Supervising Officer :	Ellie E Ellison <span>Edit</span> <span>Add</span>
Supervising Officer ID 2:	<span>Add</span>
Supervising Officer ID 3:	<span>Add</span>
Lawyer:	Dobbe Statham <span>Edit</span> <span>Add</span>
Client Employer:	

# Recovery House Software Manual

GDC Number:	<input type="text"/>
Medical History Notes:	<input type="text"/>
Current Medications Notes:	<input type="text"/>
Incarceration Notes:	<input type="text"/>
Drugs Of Choice:	<input type="text" value="Alcohol"/>
Veteran:	<input type="text"/>
Client Notes:	<input type="text"/>
Client Other:	<input type="text"/>
Intake Date:	<input type="text" value="10/11/2021"/>
Departure Date:	<input type="text"/>
Departure ID:	<input type="text"/> <input type="button" value="Add"/>
Departure Reason Notes:	<input type="text"/>

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).

# Recovery House Software Manual

## Emails

**Emails for** Susan Wyatt

Email Date Time: 10/13/2023 16:42:39

**Recipients**

**Donors**

**Volunteers**

**Vendors**

**All Others**

Susan Garner  Queenie Ipsid

**Additional Emails**

**Insert a Report**

**SINGLE or MULTIPLE emails?:**

**Attachments**

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.

# Recovery House Software Manual

Attach files to email:

Read Receipt:

Email Sender: info@recoveryhousesoftware.com

Email Subject:

Email Body:

Project ID:  Add

Contact ID: dy int Edit Add

Organization ID:  Add

Send

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).

# Recovery House Software Manual

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	<a href="#">dy.int</a>	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	<a href="#">dy.int</a>	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	<a href="#">dy.int</a>	admin	6/8/2022 3 - 5 pm Group Counseling EFT Tapping Today we tapped down SUD for triggering thoughts and <a href="#">read more...</a>	06/10/2022 11:35:31 am

Showing 1 to 3 of 3 entries

Previous 1 Next

# Recovery House Software Manual

The screenshot shows a web interface for creating a journal entry. At the top left is a blue button labeled "Add a new record". Below it, the title "Journal for" is followed by a small blue button with the text "dy int". The form contains several fields: "Contact ID:" with a dropdown menu showing "dy int" and "Edit" and "Add" buttons below it; "Staff Username:" with a text input field containing "admin"; "Journal Notes:" with a large empty text area; and "Journal Date Time:" with a text input field containing "2022-11-26". A green "Submit" button is located at the bottom left of the form.

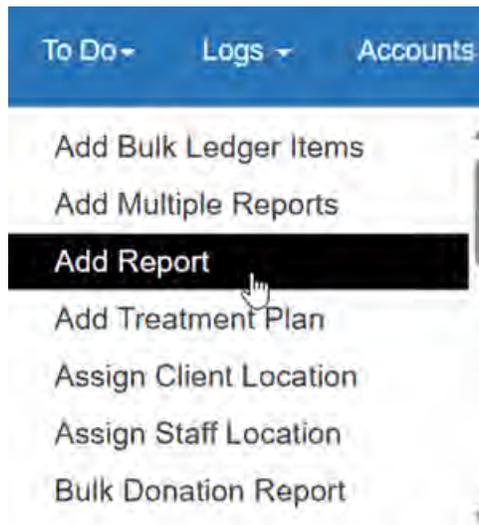
If Staff create a Journal Entry, it defaults to an empty Journal Notes box.

The screenshot shows a web interface for creating a journal entry. At the top left is a blue button labeled "Add a new record". Below it, the title "Journal for" is followed by a small blue button with the text "dy int". The form contains several fields: "Journal ID:" with a text input field containing "9"; "Contact ID:" with a dropdown menu showing "dy int" and "Edit" and "Add" buttons below it; "Staff Username:" with a text input field containing "e88"; "Journal Notes:" with a large text area containing the following text: "CLASS/SESSION NAME: Counseling", "DATE/TIME: 6/8/2022 3 pm", "LEADER: Penny", "TODAY'S TOPIC: Tapping on Triggers", and "WHAT I LEARNED: Tapping worked and brought down my stress"; and "Journal Date Time:" with a text input field containing "06/10/2022 11:53:29 am". A red "Submit" button is located at the bottom left of the form.

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.

# Recovery House Software Manual

## Group Journal



A screenshot of the 'Reports for' form in the software. At the top left is a blue button labeled 'Add a new record'. Below it, the text 'Reports for' is followed by a blue button labeled 'Emails'. A row of four buttons is present: 'View Report' (blue), 'Print Report' (blue), 'Download PDF' (green), and 'Save PDF in Client's Upload' (green). The form fields include: 'Form :', 'Report Name:' (with a dropdown menu showing 'Group Journal' selected), 'Report Creator', 'Report Created Date', 'Contact :', and 'Include DOB (Leave BLANK for NO):'. The 'Contact :' field has an 'Add' button. The 'Include DOB' field has a 'Fetch DOB' button. A date input field shows 'mm/dd/yyyy'.

# Recovery House Software Manual

Text only. NO HTML

Date Time	<input type="text"/>
Activity	<input type="text"/>
Topic	<input type="text"/>
Description	<input type="text"/>
Notes	<input type="text"/>
Clients	<input type="text"/> <input type="button" value="Select All"/> <input type="button" value="Select None"/>
Add To Client Journals	<input type="text"/> <input type="button" value="Submit Responses"/>

- Bird Rivers
- Cora Marvel
- Garner Nehemiah
- Susan Wyatt
- Terri Fuller
- Veronica Thomas

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 2<sup>nd</sup> 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

# Recovery House Software Manual

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 tufti	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	WIE 5/27/2	1.00	-131.62	-131.62	05/27/2022		admin	\$-79.57	\$0.00
673	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.

# Recovery House Software Manual

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.

# Recovery House Software Manual

## Login

Login for ClientFirst ClientLast

Contact :  Edit Add

Username:

Must contain at least one number and one uppercase and lowercase letter, and at least 8 or more characters

Password:  👁

6 Digit numeric PIN

Pin  👁

Reset:

Created Date

Created By

Last Updated Date Time:

Last Updated By

Closed Date:

Submit

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:

# Recovery House Software Manual

Password: Test1234!

PIN: 000000

RESET: Yes (Checked)

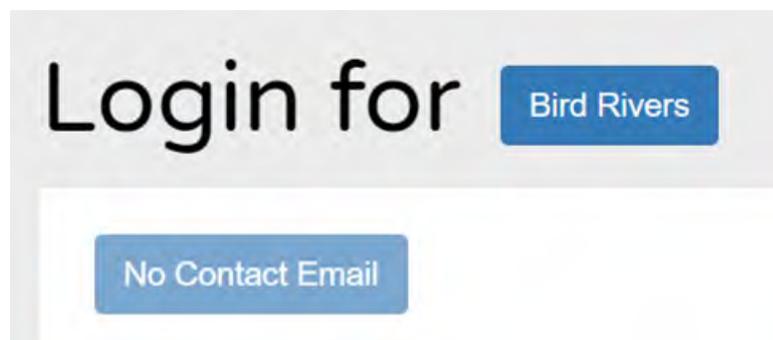
So if you are only setting a temporary Password or PIN, you can simply open the form and press Submit.

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.

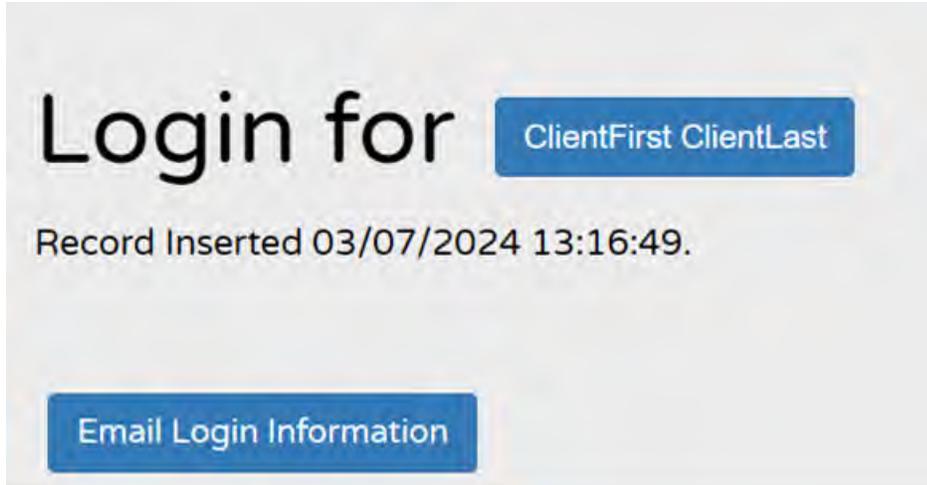
The Passwords are not accessible anywhere in the Program or the back end tables. If a User forgets their Password, you will have to reset it with a Temporary Password, provide that information to them, and let them choose a new Password and PIN.

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.



# Recovery House Software Manual



## Messages

Session Time 11:3

Main -> Contacts -> Organizations -> To Do -> Logs -> Accounts -> Lists -> Search Contact

### Messages (1 Record)

[Add a new record](#)

PDF XLS Print

Show 50 entries

Search:

Message ID	Message Date	Staff Username	Recipient	Caller Name	Caller Phone	Caller Email	Message	Caller Company	Response Required	Due Date	Site Address	Department	Enailed Date Time	Completed Date Time	Contact ID	Organization ID
18	06/10/2022 09:50:28 am	admin	Admin Demo	Harold	111-222-3333	h@mymail.com	He needs to speak to you asap.	Hoops	Please call him asap	06/10/2022		Administration			<a href="#">Admin Demo</a>	

Showing 1 to 1 of 1 entries

Previous 1 Next

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

# Recovery House Software Manual

[Add Medication](#) [Medication Admin](#) [Medication Admin Log](#) [Multiple Medications](#)

Select Client  
[Redacted]

PDF XLS Print

Show 50 entries

Search: [ ]

Action	Client	Medicine Name	Dosage	Route	Time	Adv Reaction	Ref Location	Ref Number	Ref Phone	Order Date	Pickup Date
<a href="#">Edit</a> <a href="#">Delete</a> Off	[Redacted]	Unithroid	50 Mcg	Oral	07:00 AM	Headache, insomnia, nervousness, fever	[Redacted]	[Redacted]	[Redacted]		
<a href="#">Edit</a> <a href="#">Delete</a>	[Redacted]	Hydrochlorothiazide	One 12.5mg Tablet	Oral	09:00 AM	dizziness, headache, cough, excessive tiredness, pain, burning, or tingling in the hands or feet.					

View medications and medication administration for this client.

## Notes

[Add a new record](#)

### Notes for [dy int](#)

Project ID: [ ] [Add](#)

Notes Date Time: 2022-11-26

Notes: [ ]

Staff Username: admin

Contact ID: [dy int](#) [Edit](#) [Add](#)

Organization ID: [ ] [Add](#)

[Submit](#)

# Recovery House Software Manual

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

The screenshot shows the 'Projects' section of the software. At the top, there is a navigation bar with 'Main', 'Contacts', 'Organizations', 'To Do', 'Logs', 'Accounts', and 'Lists'. A search bar is also present. Below the navigation bar, the title 'Projects (1 Record)' is displayed. There are buttons for 'Add a new record', 'PDF', 'XLS', and 'Print'. A dropdown menu shows 'Show 50 entries'. A search input field is also visible. The main content is a table with the following columns: Project ID, Project Name, Project Description, Staff Username, Due Date, Contact ID, Project Notes, Project Completed Date, and added on. The table contains one record with Project ID 22, Project Name 'Test Project', Project Description 'Test Project Description', Staff Username 'admin', Contact ID 'Admin Demo', Project Notes 'Test Project Notes', and added on '2022-06-08 22:45:22'. At the bottom, there is a pagination control showing 'Showing 1 to 1 of 1 entries' with 'Previous' and 'Next' buttons.

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

## Reports

The screenshot shows the 'Reports' section of the software. At the top, there is a navigation bar with 'Main', 'Contacts', 'Organizations', 'To Do', 'Logs', 'Accounts', and 'Lists'. A search bar is also present. Below the navigation bar, the title 'Reports (1 Record)' is displayed. There are buttons for 'Add a new record', 'PDF', 'XLS', and 'Print'. A dropdown menu shows 'Show 50 entries'. A search input field is also visible. The main content is a table with the following columns: Report ID, Report Name, Details, Creator, Created On, Form, Contact, DOB, Intake Date, and Discharge Date. The table contains one record with Report ID 2, Report Name 'Weekly Progress Report', Details 'Date: 6/16/2022 Week #: 24 Time: 11:00 am Today I Am Feeling: Lonely Because: I miss my family. Extremely Productive: Enough To Get By. Very Unproductive: Enough To Get By My Assets/ Strengths: I desire to be sober, I am a good worker My Defects /Weakness: I get depressed and lazy How Did I Spend My Time: I worked in the yard, read books, played games Have I Maintained Abstinence: read more...', Creator 'e88', Created On '06/16/2022', Form 'Weekly Progress Report', Contact 'dxjrl', DOB '08/28/1954', Intake Date '10/11/2021', and Discharge Date. At the bottom, there is a pagination control showing 'Showing 1 to 1 of 1 entries' with 'Previous' and 'Next' buttons.

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

# Recovery House Software Manual

## 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
1		CARES Community Service	Help at CARES	y521	06/14/2022	08:30:00	<a href="#">res.B.dile</a>			2022-06-10 12:25:33
2		CARES Community Service	Help at CARES	y521	06/13/2022	08:30:00	<a href="#">res.B.dile</a>			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 Contract 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 Reconciliation Date	Staff Username	added on
2033	Payment	os.Sa		nva.dile		05/27/2022	-25.00	0.00	05/27/2022	Debit Card	Receipt			<a href="#">res.B.dile</a>	688 521 8 Purchase 0 1.00 -25.00 -25.00 2022-05-27 2022-06-01 admin	Other Types of Expenses: Paid for Client: Client Medical - Expenses		saddson	2022-06-01 18:43:48
2022	Payment	os.Sa		nva.dile		05/27/2022	-20.00	0.00	05/27/2022	Debit Card	Receipt			<a href="#">res.B.dile</a>		Other Types of Expenses: Paid for Client: Client Medical - Expenses		saddson	2022-06-01 13:15:44
2021	Payment	os.Sa		nva.dile		05/27/2022	-20.00	0.00	05/27/2022	Debit Card	Receipt			<a href="#">res.B.dile</a>	684 521 9 Purchase 0 1.00 -20.00 -20.00 2022-05-27 2022-06-01 admin	Other Types of Expenses: Paid for Client: Client Medical - Expenses		saddson	2022-06-01 13:03:23
														<a href="#">res.B.dile</a>	670 521				

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

# Recovery House Software Manual

## Transitional Housing

Transitional Housing for Transitional Housing

Contact :  Edit  
Add

Transition Intake Date:

Transition Departure Date:

Departure :  Add

Transition Departure Notes:

Added On: 03/01/2024 03:55:34 pm

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.

# Recovery House Software Manual

## Contact Page Progress Notes

### Add Progress Notes

**Progress Notes**

**Select Problem**

Client is unable to remain sober. ▾

**Select Goal**

The client will become and remain sober, and pursue recovery. ▾

**Select Objective**

The client will attend all counseling, classes and activities required by the recovery program for 52 ▾

**Client Name** res B dle

**Add Progress Note**

**Progress Note**

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

# Recovery House Software Manual

Add Progress Note For XXXXXXXXXXXXXXXXXXXX

Note: Fields With red border are required

Staff Name

Progress Date

(D) What did client say or feel during visit? What did you say?

What did you observe during the visit (including non-verbal and intuitive)?

How does the client appear (mental and physical state)?

(A) Your assessment about what is going on with client.

Client stage of change and why

(P) What will you do for the client between now and the next session in response to their situation?

Add Cancel

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).

# Recovery House Software Manual

## Progress Notes Chart

Total Objective Completion Progress

Total Objectives : 5      Pending : 5      Completed : 0

Problem 1: The client is unable to remain sober.  
Goal A: The client will remain sober.  
Objective 1: Client will complete all classes and activities assigned for 52 weeks. This includes counseling and 12-Step Meetings. - Pending - Unverified

Problem 2: The client has drifted further away from God.  
Goal A: The client will grow closer to God.  
Objective 1: The client will attend church, bible studies and discipleship classes for 52 weeks. - Pending - Unverified

Problem 3: The client does not feel she has been the best mother she could be.  
Goal A: Client will work on her relationships with her children.  
Objective 1: Client will attend Family Counseling with her family members to work on their relationships. - Pending - Unverified

Problem 4: The client is not computer and phone competent.  
Goal A: Client will learn how to use computers and smart phones.  
Objective 1: The client will learn about computers and smart phones via curriculum provided by Ruth House. - Pending - Unverified

Problem 5: Client is not spending time in service to others.  
Goal A: Client will volunteer her time to help others.  
Objective 1: Client will volunteer time at a focal ministry. - Pending - Unverified

[View All Verified](#) - [View All Unverified](#)  
Select Client  
dy int

Client	Objective	Progress Notes	status	isVerified
--------	-----------	----------------	--------	------------

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

# Recovery House Software Manual

**Progress Notes**

**Problem:** The client has been unable to remain sober.

**Goal :** The client will remain sober and pursue recovery of his life.

**Objective :**  
The client will complete a minimum of 5 hours of counseling, plus all classes and activities, for the remainder of his program.

**Client Name**

**Add Progress Note**

**Progress Note**

**Response During Visit:** The client journaled: WHAT I LEARNED: We created a 3D model that represented our gifts and talents. My model represented multiple projects. My gifts include acts of service, organization, being helpful and listening to others needs. My talent is making people feel comfortable, creating a pleasant atmosphere.

**Date:** 05/10/2023

**Staff:** Penny Sue Haynes

**Response During Visit:** The client journaled: WHAT I LEARNED: We created a model of a building that represented ourselves. Mine was an immaculate building with a wall in front of it. My model represented that I am strong and healthy, and I am very guarded in what I allow in my life.

**Date:** 05/03/2023

**Staff:** Penny Sue Haynes

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

# Recovery House Software Manual

## 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.

# Recovery House Software Manual

## Treatment Report (Client & 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 ( User )	<p>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</p> <p>I have maintained my sobriety for for 20 weeks now and I have attended 20 weeks of CR classes - 03/03/2022</p> <p>I have attended 42 weeks of CR Classes - 06/09/2022</p>
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		Overhall											admin	02/15/2022

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

# Recovery House Software Manual

## Contact Page Uploads

A [REDACTED] r

Upload MULTIPLE documents:

**Limit of 10 Files at a time.**  
**No zipped files (they may contain malware).**  
Allowed File Types(.jpeg, .jpg, .png, .gif, .doc, .docx, .pdf, .xlsx)

Rename:

INTERNAL?

PROFILE PHOTO?

[Browse, Click Here to Select File](#)

[View ALL uploads CHRONOLOGICALLY for this client.](#)

[View ALL uploads ALPHABETICALLY for this client.](#)

Zip	File
<input type="checkbox"/>	<a href="#">Office_visit_notes.pdf</a> [Delete] [View] (Uploaded by Penny Haynes on 10/06/2023 02:16 pm)

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).

# Recovery House Software Manual

[Add a new record](#)



## Contacts for [View Details](#)

[Other](#) | [Progress Notes](#) | [Related Contacts](#) | [Uploads](#) | [Create Organization](#)

[Delete](#)

**Expected Graduation Date:** 06/10/2023  
**Departure Date:**  
**Intake Date:** 06/10/2022  
**Birth Date:** ██████████  
**Emergency Contact:** [\[Redacted\]](#)  
**Supervising Officer:** [\[Redacted\]](#)  
**Supervising Officer 2:** [\[Redacted\]](#)  
**Supervising Officer 3:** [\[Redacted\]](#)  
**Lawyer:** [\[Redacted\]](#)

## View All Contacts

[Add Contact](#) | [View All Contacts](#) | [Addresses](#) | [AHJ](#) | [Business Client](#) | [Client](#) | [Client Associate](#) | [Client Employer](#) | [Client Family](#) | [Client Prospect](#) | [Client Prospect Closed](#) | [Community](#) | [Donor](#) | [Donor Prospect](#) | [Emergency Contact](#) | [Ministry](#) | [Past Client](#)

[Past Staff](#) | [Staff](#) | [Supervising Officer](#) | [Vendor](#) | [Volunteer](#)

### Contacts (540 Records)

[Add a new record](#)  
[PDF](#) | [XLS](#) | [Print](#)  
 Show  entries  
 Search:

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	Level	Related Contact ID
<a href="#">517</a>	Client Prospect	Fiona		Bird								Contact us on: 06/10/2022 Date of Birth: 02/04/1989 Drugs: Heroin Incarceration location: Cher <a href="#">read more...</a>	Added From Contact Form			06/10/2022	0	

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

# Recovery House Software Manual

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	Lat/Lng
<a href="#">418</a>	vid	4 H		Jasper	GA	30143			
<a href="#">417</a>	len	8 B		Jasper	GA	30143			
<a href="#">416</a>	rpe	8a		Jasper	GA	30143			
<a href="#">414</a>		5 C		Jasper	GA	30143	Pickens		
<a href="#">413</a>		5 N		Jasper	GA	30143	Pickens		
<a href="#">411</a>		7 B		Cartersville	GA	30120	Barlow		
<a href="#">410</a>	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.

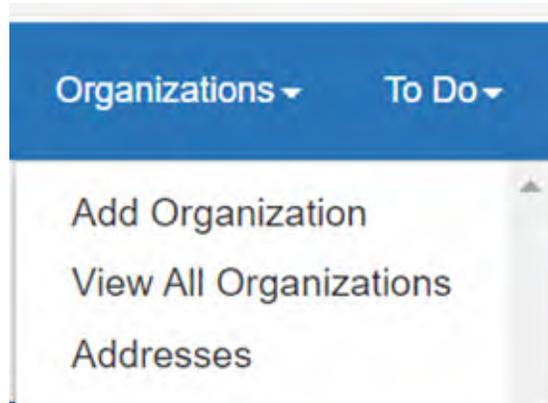
You can search for data within the columns.

You can sort by 1 column at a time.

You can select a record to view or edit it.

# ORGANIZATIONS

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# Recovery House Software Manual

## Add Organization

The screenshot shows a web form for adding a new organization record. At the top left, there is a blue button labeled 'Add a new record'. Below it, the form is titled 'Organization for' followed by a small blue square icon. The form contains the following fields:

- Organization Name: A text input field with a red border.
- Organization Phone: A text input field.
- Organization FAX: A text input field.
- Organization Email: A text input field.
- Organization Address: A text input field with a small blue 'Add' button to its right.
- Organization Notes: A text area with a small blue 'Add' button to its right.
- Organization Website: A text input field.
- Organization Type: A text input field with a small blue 'Add' button to its right.
- Added On: A date and time field showing '10/15/2023 09:08:49 pm'.

At the bottom left of the form, there is a green button with a white arrow pointing right.

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 Add 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.

# Recovery House Software Manual

**Organization for** Record Inserted 10/15/2023 21:05:47.

**Create Contact**

Organization : 762

Organization Name: Test Org

Organization Phone: 1234457890

Organization FAX:

Organization Email: test@ms.com

Organization Address :

Organization Notes:

Organization Website:

Organization Type : Emergency Contact

added on: 2023-10-15 21:05:47

Submit

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

Click Create Contact

Create New Contact

First Name

Middle Name

Last Name

Submit Close

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.

# Recovery House Software Manual

## 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
<a href="#">531</a>	vid &				vid 4 H Jasper GA 30143			Donor	2022-06-06 15:29:14
<a href="#">530</a>	y Ste							Client Family	2022-06-01 19:38:51
<a href="#">529</a>	hley							Client	2022-06-01 19:35:11
<a href="#">528</a>	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	Lat/Lng
<a href="#">418</a>	vid	4 H		Jasper	GA	30143			
<a href="#">417</a>	len	8 B		Jasper	GA	30143			
<a href="#">416</a>	rpe	8a		Jasper	GA	30143			
<a href="#">414</a>		5 C		Jasper	GA	30143	Pickens		
<a href="#">413</a>		5 N		Jasper	GA	30143	Pickens		
<a href="#">411</a>		7 B		Cartersville	GA	30120	Barlow		
<a href="#">410</a>	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.

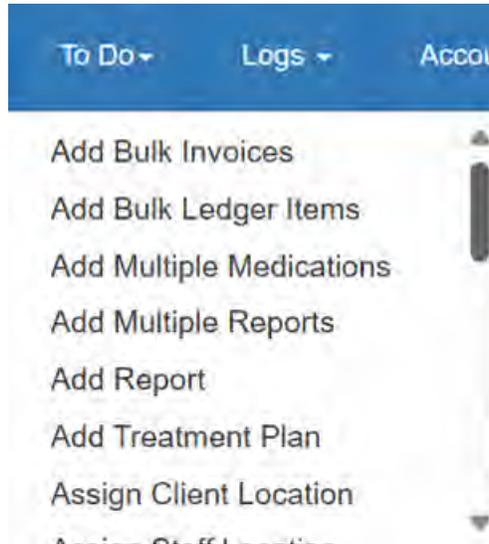
You can sort by 1 column at a time.

# Recovery House Software Manual

You can select a record to view or edit it.

## TO DO

---



# Recovery House Software Manual

## Add Bulk Invoices

Month  Year  Due Date

Send All Email's CC to Admin

<input type="button" value="Select All"/>	Client Name	Email Client	Email Emergency Contact	Email Lawyer
<input type="checkbox"/>	Bird Rivers			
<input type="checkbox"/>	Cora M Marvel			
<input type="checkbox"/>	Garner C Nehemiah			
<input type="checkbox"/>	Susan B Wyatt		<input type="checkbox"/> sg@me.com	
<input type="checkbox"/>	Terri Fuller			
<input type="checkbox"/>	Tom Jones			
<input type="checkbox"/>	Veronica L Thomas			

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)

# Recovery House Software Manual

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

**Add Ledger Item**

Select Item

Credit/Debit  Amount (If you change Amount, uncheck clients and check again)

Notes

Select Clients

<input type="checkbox"/>	Client Name	Account Balance	Wages Balance	Account - Wages Balance	Amount	Notes
<input type="checkbox"/>	Bird Rivers	\$-144.11	\$0.00	\$-144.11	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Cora M Marvel	\$-986.56	\$0.00	\$-986.56	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Garner C Nehemiah	\$-1,150.04	\$72.16	\$-1,077.88	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Susan B Wyatt	\$1,394.55	\$0.00	\$1,394.55	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Terri Fuller	\$-950.00	\$0.00	\$-950.00	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Tom Jones	\$0.00	\$0.00	\$0.00	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Veronica L Thomas	\$-909.69	\$0.00	\$-909.69	<input type="text"/>	<input type="text"/>

# Recovery House Software Manual

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

Add Multiple Medications				
Select Item				
<input type="checkbox"/>	Client	Dosages	Medicine Note	Medicine Error
<input type="checkbox"/>	Bird Rivers	NAPROXEN 500 MG TABLETS TAKE TWICE DAILY WITH MEALS .06:45 AM pantoprazole sod DR 40 mg TAKE ONE TABLET BY MOUTH DAILY.06:45 AM CITALOPRAM HBR 20 MG TAKE ONE TABLET BY MOUTH DAILY.06:45 AM ATORVASTATIN 40 mg TAKE ONE AT BED TIME .08:00 PM	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Cora M Marvel	Bupropion HCL XL 150mg (Wellbutrin) 150mg 1 tablet by mouth daily .06:30 AM TRAZODONE 50 MG Take at bedtime .08:00 PM Lamotrigine 25 MG Take one tablet by mouth twice daily .06:45 AM Lamotrigine 25 MG Take one tablet by mouth twice daily .08:00 PM	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Susan B Wyatt	HYDROCHLOROTHIAZIDE 12.5 mg Take one tablet by mouth every morning .06:45 AM LISINOPRIL 20 mg Take one tablet by mouth every morning .06:45 AM AMLODIPINE 5 mg Take one tablet by mouth every morning .06:45 AM TOPIRAMATE 100 mg Take one tablet twice daily .06:45 AM	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Terri Fuller	GABAPENTIN 300MG Take 1 capsule by mouth three times daily for 30 days .06:45 AM GABAPENTIN 300MG Take 1 capsule by mouth three times daily for 30 days .08:00 PM CITALOPRAM 20MG TAKE 1 TABLET BY MOUTH ONCE DAILY.06:45 AM HYDROXYZINE PAMOATE 50MG TAKE 1 CAPSULE BY MOUTH TWICE DAILY.06:45 AM	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Veronica L Thomas	LORATADINE 10 MG TAKE ONE TABLET BY MOUTH DAILY.06:45 AM PRENATAL FL TAB NAT TAKE ONE TABLET BY MOUTH DAILY .06:45 AM METRONIDAZOLE 500 MG Take one tablet by mouth twice daily for seven days .06:45 AM METRONIDAZOLE 500 MG Take one tablet by mouth twice daily for seven days .08:00 PM	<input type="text"/>	<input type="text"/>

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.

# Recovery House Software Manual

## Add Multiple Reports

The screenshot shows the 'Multiple Client Report' interface. At the top, it says 'Multiple Client Report' and 'Fill step by step'. Below this is a progress bar with four steps: 'Report Information' (active), 'Report Details', 'Clients', and 'Finish'. The 'Report Information' step contains a form with the following fields: 'Select Form' (a dropdown menu), 'Report Name' (a text input field), 'Report Creator' (a text input field with 'admin' entered), and 'Report Created On' (a date input field with '12 29 2022' entered). A 'Next Step' button is located at the bottom of the form.

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

The screenshot shows the 'Fill in Report Details' form. It has the following sections and fields: 'Date of Report' (12/29/2022), 'Reporting Staff' (Penny Haynes, Program Director), 'Progress Report' (The client is working his program and remaining sober through work and passes.), and 'Issues' (There are no issues.).

[Previous](#) [Next Step](#)

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

# Recovery House Software Manual

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

# Recovery House Software Manual

The screenshot shows a web interface for adding a new report. At the top left is a blue button labeled "Add a new record". Below it, the text "Reports for" is followed by a blue square icon. A row of four buttons is displayed: "View Report" (blue), "Print Report" (blue), "Download PDF" (green), and "Save PDF in Client's Upload" (green). The form consists of several rows of input fields:

- Form ID:** A dropdown menu with an "Add" button to its right.
- Report Name:** A text input field.
- Report Creator:** A text input field containing the value "admin".
- Report Created Date:** A text input field containing the date "2022-12-29".
- Contact ID:** A dropdown menu with an "Add" button below it.
- Include DOB:** A text input field.

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 2<sup>nd</sup> 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.

# Recovery House Software Manual

## Add Treatment Plan

### Add Treatment Plan Back

**Client Name**

**Treatment Plan Creation Date \***

**Staff Name \***

**Client Date of Birth**

**Client Intake Date**

**Initial Plan Date \***

**Plan Updated On**

**Mental Illness Diagnosis**

**Substance Use Diagnosis \***

**Self Assessment \***  
DSM CRITERIA  
\_\_\_ out of 11 - \_\_\_ Substance Use Disorder  
-Taking the substance in larger amounts or for longer than you're meant to.  
-Wanting to cut down or stop using the substance but not managing to.  
-Spending a lot of time getting, using, or recovering from use of the substance.  
-Cravings and urges to use the substance.  
-Not managing to do what you should at work, home, or school because of substance use.  
-Continuing to use, even when it causes problems in relationships.

Problems **Goals** Objectives

+ Add New problem

Problem

Showing 0 out of 0 entries

# Recovery House Software Manual

in danger.

-Continuing to use, even when you know you have a physical or psychological problem that could have been caused or made worse by the substance.

-Needing more of the substance to get the effect you want (tolerance).

-Development of withdrawal symptoms, which can be relieved by taking more of the substance.

**Client Goals \***

**Stage of Treatment \***

**Stage of Change**

Save

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. **\*\*\***

**Add Treatment Plan** Back

[View Progress Note Chart](#)

**Client Name**  
Bird Rivers

**Treatment Plan Creation Date \***  
10/14/2021

**Staff Name \***  
Penny Haynes

**Client Date of Birth**  
08/28/1954

**Client Intake Date**  
10/11/2021

**Initial Plan Date \***  
10/14/2021

**Plan Updated On**  
mm/dd/yyyy

**Mental Illness Diagnosis**

Problems **Goals** Objectives

**Add New problem**

**Problem**

Problem 1 : The client is unable to remain sober

Problem 2 : The client has drifted further away from God.

Problem 3 : The client does not feel she has been the best mother she could be.

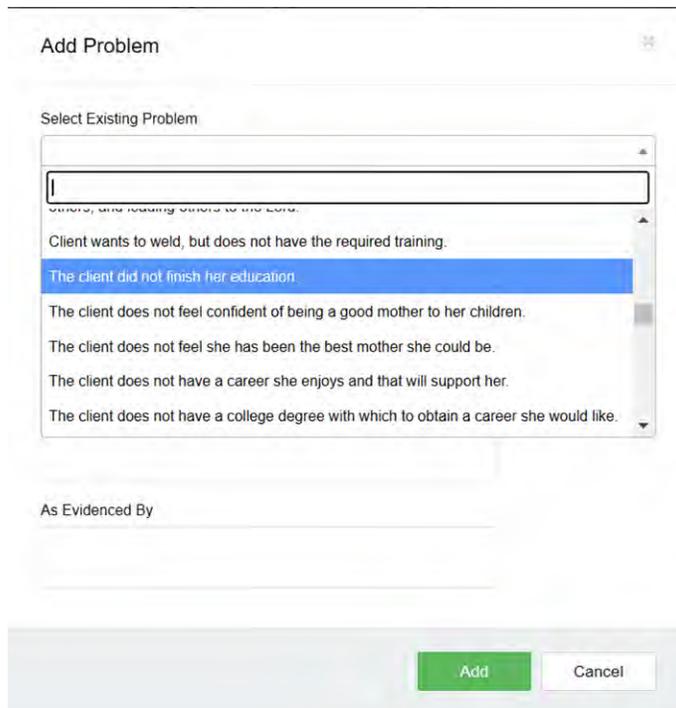
Problem 4 : The client is not computer and phone competent.

Problem 5 : Client is not spending time in service to others.

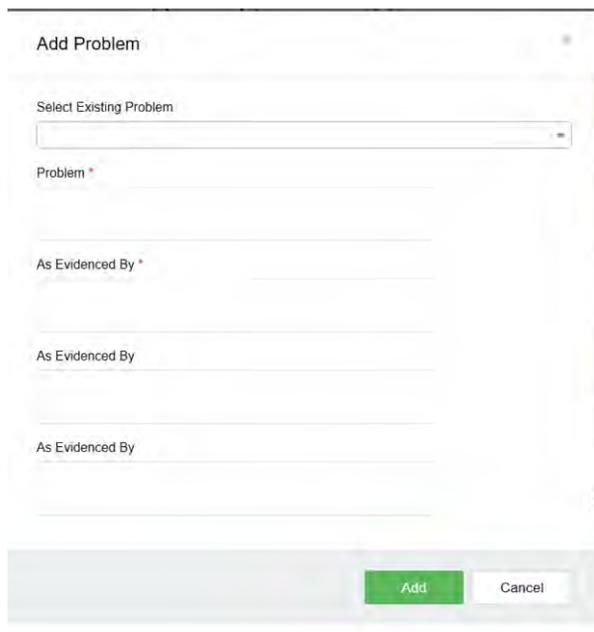
Once selected, you can click on View Progress Note Chart to see what Treatment Plan update notes the client has entered to prove they are working on their Treatment Plan.

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.

# Recovery House Software Manual

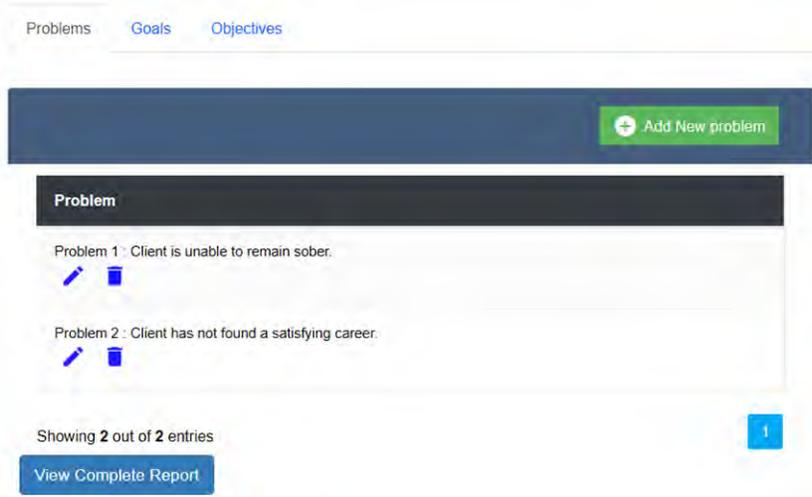


When you Add a Problem, Goal or Objective, it will allow you to select from previously created Problems, Goals and Objectives, to allow for more efficient and uniform Treatment Plans.

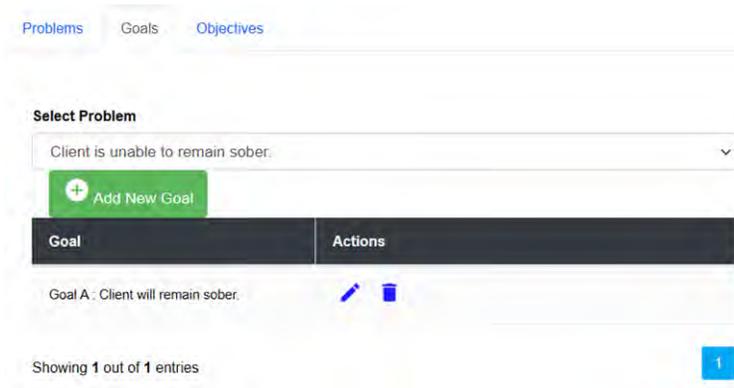


If nothing fits, then use the box below it to create a new entry.

# Recovery House Software Manual



First enter the Problem.



Next, select the Problem and enter the Goals.

# Recovery House Software Manual

Problems   Goals   Objectives

Select Problem  
Client is unable to remain sober.

Select Goal  
Client will remain sober.

+ Add Objective   Sort Objectives

**Objective**

Objective 1: Client will complete all counseling, classes and activities for 52 weeks.  
Due Date: 02/19/2023  
Intervention: Staff will provide curriculum, counseling and transportation for activities.  
Responsible Professional: House Administrator, CADG II  
Notes:  
Completion Date:

Showing 1 out of 1 entries

Then select the Problem and Goal and enter the Objectives.

# Recovery House Software Manual

Select Problem

Client is unable to remain sober.

Select Goal

Client will remain sober.

+ Add Objective

Sort Objectives

**Objective**

Objective 1: Client will complete all counseling, classes and activities for 52 weeks.  
Due Date: 02/19/2023  
Intervention: Staff will provide curriculum, counseling and transportation for activities.  
Responsible Professional: House Administrator, CADC II  
Notes:  
Completion Date:

Objective 2: Client will attend a minimum of one (1) 12-step meeting per week for a minimum of 52 weeks.  
Due Date: 02/19/2023  
Intervention: Staff will provide transportation or 12-Step meeting  
Responsible Professional: House Manager, House Employees, Volunteers  
Notes:  
Completion Date:

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

Re sort objectives

Client will complete all counseling, classes and activities for 52 weeks.

Client will attend a minimum of one (1) 12-step meeting per week for a minimum of 52 weeks.

Save Cancel

# Recovery House Software Manual

## Assign Client Location

**Clients Location Assignment**

[Assign Location](#) [View Location Report](#)

PDF XLS Print

Show 50 entries

Search:

Id	Client	Unit	Room	Bed Number	Assign Date	Vacated Date	Notes	Action
1	<a href="#">James Christian Gentry</a>	601 Moore Rd	1	1	11/19/2022			<a href="#">Vacate</a> <a href="#">Delete</a>
13	<a href="#">James C Boyd</a>	601 Moore Rd	1	2	12/16/2022			<a href="#">Vacate</a> <a href="#">Delete</a>
2	<a href="#">James William Del Rosario</a>	601 Moore Rd	2	1	11/19/2022			<a href="#">Vacate</a> <a href="#">Delete</a>
3	<a href="#">James Charles Adams</a>	601 Moore Rd	2	2	11/19/2022			<a href="#">Vacate</a> <a href="#">Delete</a>

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.

# Recovery House Software Manual

Choose Location

Select Client \* clients with color red are already assigned bed)

Unit

Room

Bed Number

Date Assigned  
mm/dd/yyyy

Notes

Add Cancel

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.

Assign Client Location

Filter By Client Filter By Unit Filter By Room Clear Filters

PDF XLS Print

Show 50 entries

Search:

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

# Recovery House Software Manual

**Staff Location Assignment**

Assign Staff Location View Staff Location Report

PDF XLS Print

Show 50 entries

Search:

Id	Staff	Unit	Assign Date	Vacated Date	Notes	Action
1	<a href="#">Fuller Verona</a>	House 1	04/01/2022			<span style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 3px;">Vacate</span> <span style="background-color: #17a2b8; color: white; padding: 2px 5px; border-radius: 3px;">Delete</span>
2	<a href="#">Kellen Ellison</a>	House 1	04/01/2022			<span style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 3px;">Vacate</span> <span style="background-color: #17a2b8; color: white; padding: 2px 5px; border-radius: 3px;">Delete</span>
3	<a href="#">Healow O Xander</a>	House 2	04/01/2022			<span style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 3px;">Vacate</span> <span style="background-color: #17a2b8; color: white; padding: 2px 5px; border-radius: 3px;">Delete</span>

Select Staff \* Staff with color red are already assigned unit)

Unit

Date Assigned

Notes

Add Cancel

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

# Recovery House Software Manual

Select Year  
2022

Download Pdf ALL    Generate/Upload Separate PDFs    Send Email ALL    Download Organization Mailing Labels

Download Organization Contact List    Test Bulk Emails    Send All Email's CC to Admin  No

Organization

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.

# Recovery House Software Manual

**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
	<b>Total</b>	<b>\$0.00</b>	<b>\$7,447.00</b>

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

# Recovery House Software Manual

## 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 new record](#)

### Classes for

[Uploads](#)

[Delete](#)

Class ID:

Class Name:

Class Description:

added on:

[Submit](#)

Add a class. Upload the curricula.

# Recovery House Software Manual

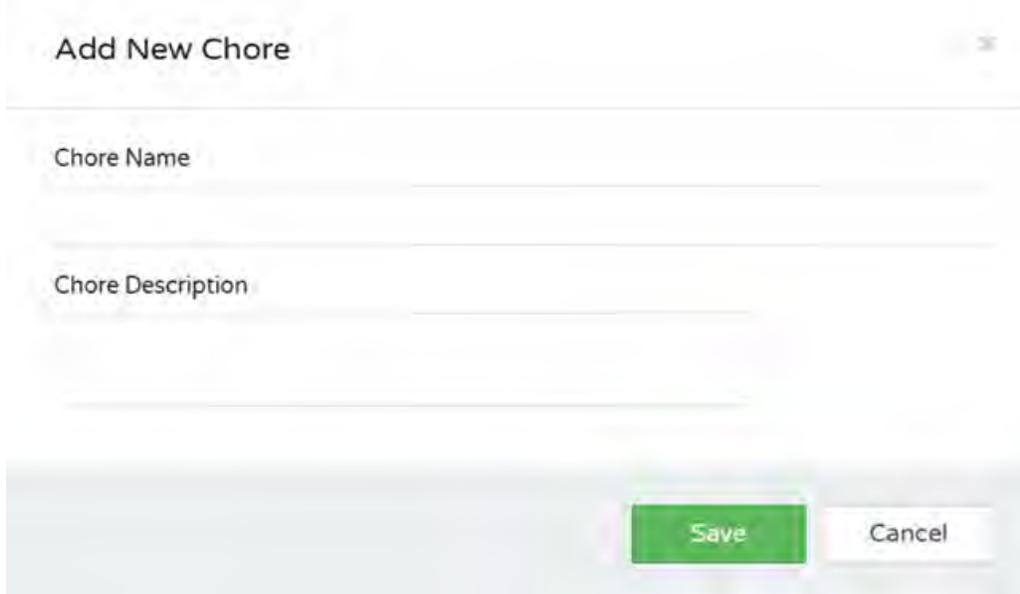
## Edit Chore Names

The screenshot displays the 'Edit Chore Names' interface. At the top, there is a blue 'Add New Chore' button. Below it are three buttons for 'PDF', 'XLS', and 'Print'. A 'Show 50 entries' dropdown menu and a search input field are also present. The main area is a table with three columns: 'Action', 'Chore name', and 'Chore Description'. Each row represents a chore and includes 'Edit' and 'Delete' buttons. The chores listed are: Dishes, Double Middle Bathroom, Downstairs Bathroom, House, Kitchen, and another Kitchen entry.

Action	Chore name	Chore Description
<a href="#">Edit</a> <a href="#">Delete</a>	Dishes	1. wash dishes. 2. Rinse 3—dry 4. put away all dishes after each meal. No dishes are to be left in <a href="#">read more...</a>
<a href="#">Edit</a> <a href="#">Delete</a>	Double Middle Bathroom	1. Take out trash 2—clean mirrors 3. Wipe down countertops 4. Sweep 5. Mop 6. Clean and disinfect th <a href="#">read more...</a>
<a href="#">Edit</a> <a href="#">Delete</a>	Downstairs Bathroom	1. Take out trash 2. Clean mirrors 3. Wipe down countertops 4. Sweep 5. Mop 6. Clean and disinfect t <a href="#">read more...</a>
<a href="#">Edit</a> <a href="#">Delete</a>	House	Vacuum all areas and stairs every day Dust all shelves and counters. Clean stairs well going to upst <a href="#">read more...</a>
<a href="#">Edit</a> <a href="#">Delete</a>	Kitchen	1. Cook Meals prepare meals 3 x daily. Wipe down counters disinfect counters. Clean refrigerator out <a href="#">read more...</a>
<a href="#">Edit</a>	Kitchen	

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

# Recovery House Software Manual



Add New Chore

Chore Name

Chore Description

Save Cancel

Add a Chore Name and Description. Press Save.

## Chores



Assign Chore All Chores Assigned

Bird Rivers Chores from

- 1: 06/08/2022 Single Bathroom Details - Edit - Delete ✓
- 2: 06/08/2022 House Details - Edit - Delete ✓
- 3: 06/08/2022 Dishes Details - Edit - Delete ✓
- 4: 06/09/2022 Single Bathroom Details - Edit - Delete ✓
- 5: 06/09/2022 House Details - Edit - Delete ✓
- 6: 06/09/2022 Dishes Details - Edit - Delete ✓
- 7: 06/10/2022 Single Bathroom Details - Edit - Delete ✓
- 8: 06/10/2022 House Details - Edit - Delete ✓
- 9: 06/10/2022 Dishes Details - Edit - Delete ✓
- 10: 06/12/2022 House Details - Edit - Delete ✓
- 11: 06/12/2022 Single Bathroom Details - Edit - Delete ✓

Garner C Nehemiah Chores from

- 1: 06/06/2022 Upstairs Apartment Details - Edit - Delete ✓
- 2: 06/07/2022 Upstairs Apartment Details - Edit - Delete ✓

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

# Recovery House Software Manual

Complete Chore Assignee - Incomplete Chore Assignee - All

Add New Chore Assignee

PDF XLS Print

Show 200 entries

Search:

	Chore name	Assigned To	Chore Notes	Assigned By	Due Date	Completion Date
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Downstairs Bathroom	Cora M Marvel		tcoggins	06/12/2022	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	House	Bird Rivers		tcoggins	06/12/2022	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	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

# Recovery House Software Manual

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.

The screenshot displays the 'Forms for' creation interface. At the top left, there is a blue button labeled 'Add a new record'. Below this, the title 'Forms for' is followed by a small blue square icon. The form consists of several input fields: 'Form Abbrev.', 'Form Name', 'Form Category', 'Template', and 'Username'. The 'Form Category' dropdown menu is open, showing a list of categories: 'Client Reports', 'Client/Staff', 'Letter', 'Newsletter', 'Staff and Leader Reports', 'Staff Reports', and 'Web Report'. There are blue 'Add' buttons next to the 'Form Category' and 'Template' dropdowns. A green 'Submit' button is located at the bottom left of the form.

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.

# Recovery House Software Manual

The screenshot shows a software interface with three buttons at the top: "Add a new record", "Re Order Fields", and "Add Default Fields". Below these is a table with the following data:

ID	Field Order	Field Abbreviation	Field Label	Field Type	Field Options
495	0	First_Name	First Name	Small Text Box	
496	1	Middle_Name	Middle Name	Small Text Box	
497	2	Last_Name	Last Name	Small Text Box	

Below the table, there is a section titled "Forms for" with a dropdown menu. A "Delete" button is visible. The form configuration includes:

- Form : 61
- Form Abbrev: Test1
- Form Name: Test Form
- Form Category : Web Report

Buttons for "Edit" and "Add" are located below the "Form Category" dropdown.

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.

The "Re Order Fields" dialog box shows a table with the following data:

Order	Field
0	First Name
1	Middle Name
2	Last Name

At the bottom of the dialog are "Submit" and "Close" buttons.

Drag the Fields to the correct order.

# Recovery House Software Manual

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:

# Recovery House Software Manual

Form Category: Web Report Edit

Add

Template: Add

Username: phaynes

Submit

**To Import a Template**  
1) Select your Template above  
2) Enter "Template" in Field Label.  
3) Choose "Large Text Area" for Field Type.

Field Order: 3

Field Label:

Field Type: Add

Field Options (separated by commas):

Username: phaynes

Submit Form Field

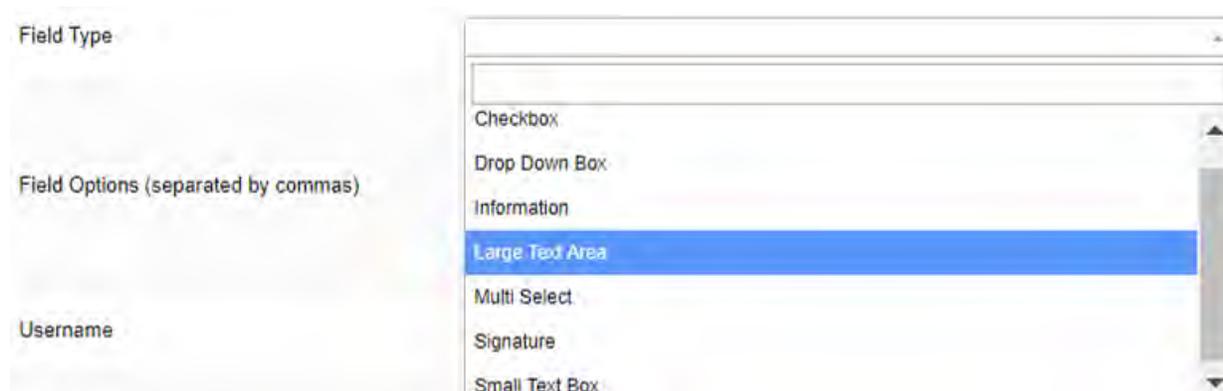
Make sure the Template has been created and is selected in the Form.

In the Field Label, enter the word Template.

Then select Large Text Area for the Field Type.

# Recovery House Software Manual

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.

# Recovery House Software Manual

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.

Web Reports		
Testimonials	<code>&lt;a href=" [REDACTED] &amp;formId=50" target="_blank"&gt;&lt;h2&gt;Testimonials&lt;/h2&gt;&lt;/a&gt;</code>	Copy to Clipboard
Application	<code>&lt;a href=" [REDACTED] &amp;formId=52" target="_blank"&gt;&lt;h2&gt;Application&lt;/h2&gt;&lt;/a&gt;</code>	Copy to Clipboard
Test Form	<code>&lt;a href=" [REDACTED] &amp;formId=54" target="_blank"&gt;&lt;h2&gt;Test Form&lt;/h2&gt;&lt;/a&gt;</code>	Copy to Clipboard

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.

<a href="#">Web Reports</a>	4005	Application	Application	[REDACTED] ar	07/19/2023	View	Delete	View Contact
<a href="#">Payment Information</a>	4004	Test Form	Test Form	[REDACTED] b	07/18/2023	View	Delete	Create Contact

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

## Reports (3813 Records)

[Add a new record](#)

<a href="#">4005</a>	Application	First Name: [REDACTED] m Middle Name: A [REDACTED] Last Name: <a href="#">read more...</a>	07/19/2023	Application	[REDACTED]
<a href="#">4004</a>	Test Form	First Name: Tom Middle Name: B Last Name: Thum <a href="#">read more...</a>	07/18/2023	Test Form	

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

# Recovery House Software Manual

## Define Auto Email Configuration

Client Reports Email	Daily Records Email
<input type="text" value="housestaff@prpministries.com"/>	<input type="text" value="info@gurecovery.org"/>
Prospect Weekly Email	Clients Without Journal Entries Email
<input type="text" value="info@gurecovery.org"/>	<input type="text" value="housestaff@prpministries.com"/>
Contact Type Change Email	Web Reports Email
<input type="text" value="housestaff@prpministries.com"/>	<input type="text" value="pennyhynes@prpministries.com"/>
Current Client Information Email	
<input type="text" value="pennyhynes@prpministries.com"/>	

## Incomplete Projects

Filtered to show only incomplete Projects.

## Incomplete Tasks

Filtered to show only incomplete Tasks.

## Maintenance

# Recovery House Software Manual

## 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			<a href="#">Penny Sue Haynes</a>
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			<a href="#">Penny Sue Haynes</a>
31	QA: Proof of Personal Vehicle 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			<a href="#">Penny Sue Haynes</a>

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.

# Recovery House Software Manual

## Maintenance for ■

Maintenance Object:	<input type="text"/>
Maintenance Task:	<input type="text"/>
Maintenance Description:	<input type="text"/>
Maintenance Interval Number	<input type="text"/>
Maintenance Interval :	<input type="text"/> <input type="button" value="Add"/>
Maintenance Last Completed Date:	<input type="text"/>
Maintenance Next Due Date:	<input type="text"/>
Maintenance Notes:	<input type="text"/>
Organization :	<input type="text"/> <input type="button" value="Add"/>
Contact :	<input type="text"/> <input type="button" value="Add"/>

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

# Recovery House Software Manual

## 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 02:32:16 pm	admin	Admin Demo	Test			Dbsuwisbdidf						11/24/2022 02:32:36 pm	11/24/2022 02:34:18 pm		
15	06/08/2022 10:25:59 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.

### Messages for

Message Date Time: 10/16/2023 07:02:43 pm

Staff Username: phaynes

Recipient:

Caller Name:

Caller Phone:

Caller Email:

Message:

Caller Company:

Response Required:

Due Date: mm/dd/yyyy

Site Address:

Department:

Emailed Date Time:

Completed Date Time:

Contact:  Add

Organization:  Add

Submit

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

# Recovery House Software Manual

## My Tasks

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

## Projects

Projects (22 Records)

[Add a new record](#)

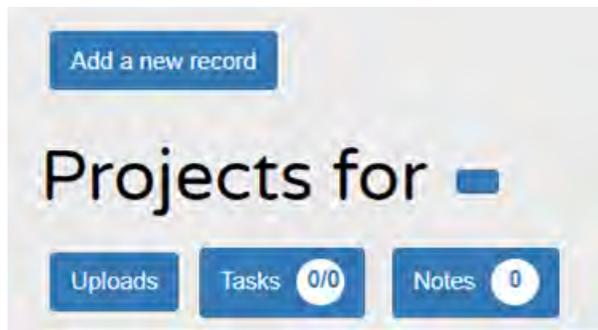
PDF XLS Print

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		<a href="#">Fuller</a> <a href="#">Verona</a>	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.

# Recovery House Software Manual

## Projects for

Project Name:	<input type="text"/>
Project Description:	<input type="text"/>
Staff Username	phaynes
Due Date	<input type="text" value="mm/dd/yyyy"/> 
Contact :	<input type="text"/>  <input type="button" value="Add"/>
Project Notes:	<input type="text"/>
Project Completed Date:	<input type="text"/>
Added On:	10/16/2023 07:06:26 pm
<input type="button" value="Submit"/>	

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

# Recovery House Software Manual

## Recent Progress Notes

Client	Problem, Goal, Objective	Progress Note	Created Date	Action
...	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	<a href="#">Details</a> <a href="#">Delete</a>
...	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	<a href="#">Details</a> <a href="#">Delete</a>
...	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	<a href="#">Details</a> <a href="#">Delete</a>
...	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	<a href="#">Details</a> <a href="#">Delete</a>
...	Problem: Client is mandated to a Family Violence Class. Goal: Client will complete a Family Violence		12-29-2022	<a href="#">Details</a>

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 <a href="#">read more...</a>	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 Marcel	06/21/1982	02/19/2022	

# Recovery House Software Manual

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
<input type="checkbox"/>	12	Application for Ruth House	asdf	asdf	nehemiah	02/16/2023	23:51:00	<a href="#">Bela Brothers</a>	atest	02/16/2023 01:47:28 pm
<input type="checkbox"/>	11	Application for Ruth House	Test task	test task	nehemiah	02/17/2023	12:06:00	<a href="#">Garner C Nehemiah</a>	Test	02/16/2023 01:05:11 pm
<input type="checkbox"/>	10		Test Task 11/21/2022	Test Description	admin	11/22/2022	17:00:00	<a href="#">Garner C Nehemiah</a>		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 <a href="#">read more...</a>	phaynes	02/28/2018
6	DOCUMENTED Invoice	Invoice	Invoice for: CLIENT_NAME Intake Date: INTAKE_DATE INVOICE FOR THE MONTH OF _____, _____ Due <a href="#">read more...</a>	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 <a href="#">read more...</a>	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 <a href="#">read more...</a>	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 <a href="#">read more...</a>	phaynes	08/17/2017
2	Acceptance Letter	Acceptance Letter	Ruth House in Ranger, GA is a GARR and THOR-approved, non-nicotne Christian rehabilitation faciit <a href="#">read more...</a>	phaynes	08/13/2017
1	Intake Letter	Intake Letter	Ruth House in Ranger, GA is a GARR and THOR-approved, non-nicotne Christian rehabilitation faciit <a href="#">read more...</a>	phaynes	08/13/2017

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

# Recovery House Software Manual

## Templates for ■

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

Delete

Template ID:

Template Name:

Form ID:  Edit Add

Ruth House in Ranger, GA is a GARR and THOR-approved, non-nicotine Christian rehabilitation facility for women 18+ with substance disorder issues.

CLIENT\_NAME has been received on site and has begun our 12+ month recovery program as of INTAKE\_DATE.

CLIENT\_PHOTO

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

Form ID:

Form Abbrev:

Form Name:

Form Category:  Edit

Template ID:  Edit Add

Username:

Submit

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

# Recovery House Software Manual

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	<div style="border: 1px solid red; padding: 2px; display: inline-block;">Incomplete</div> <div style="border: 1px solid blue; padding: 2px; display: inline-block; background-color: #007bff; color: white;">Verify Now</div>
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	<div style="border: 1px solid red; padding: 2px; display: inline-block;">Incomplete</div> <div style="border: 1px solid blue; padding: 2px; display: inline-block; background-color: #007bff; color: white;">Verify Now</div>
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 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	<div style="border: 1px solid red; padding: 2px; display: inline-block;">Incomplete</div> <div style="border: 1px solid blue; padding: 2px; display: inline-block; background-color: #007bff; color: white;">Verify Now</div>

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.

# Recovery House Software Manual

## Verify Objective Completed

View All Verified - View All Unverified

Select Client

		Progress Notes	status	isVerified
Bird Rivers Cora M Marvel Garner C Nehemiah Susan B Wyatt Terri Fuller Veronica L Thomas				
	Treatment Plan Notes	I took the 60 question assessment and printed out the results along with a he list of jobs on it that fit my profile. - 07/07/2021	Complete	<span>Incomplete</span> <span>Verify Now</span>
Stathem L Marvel	The client will - research what her options for communication are in regard to the children she gave up her rights to, and how she can communicate with them - Create a task list of things to do to accomplish	I do not know where to start....- 11/08/2021 This is not complete yet. I need help figuring this out, please. - 11/11/2021	Complete	<span>Incomplete</span> <span>Verify Now</span>
Cora M Marvel	Client will research possible vocations using https://www.mynextmove.org/explore/ip. She will create a list of the vocations that most interest her, and what she would need to obtain these jobs, and add that to her Treatment Plan.	I have done the survey on mynextmove.com and printed out the results. I've narrowed down some careers I am interested in.- 04/08/2022	Complete	<span>Incomplete</span> <span>Verify Now</span>
Garner C Nehemiah	Client will research what she has to do to take her last unit to graduate high school, either online or in person. She will detail the plan and get the details to make a decision.	I contacted Chat Tech about GED. I have to take a test, register, take classes, take test - 06/10/2022	Complete	<span>Incomplete</span> <span>Verify Now</span>

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

# Recovery House Software Manual

### Units

Add New Unit

PDF XLS Print

Show 50 entries

Search:

Id	Name	Number Beds	Location	notes	Action
1	House 1	10	1 Main Street, Canton, GA 30114		<span style="color: red;">✖</span> <span style="color: red;">✖</span>
2	House 2	8	2 Main Street, Canton, GA 30114		<span style="color: red;">✖</span> <span style="color: red;">✖</span>
3	House 3	6	3 Main Street, Canton, GA 30114		<span style="color: red;">✖</span> <span style="color: red;">✖</span>

Showing 1 to 3 of 3 entries

Previous 1 Next

### Rooms

Add New Room

PDF XLS Print

Show 50 entries

Search:

Id	Unit	Room Number	Room Name	Number of Beds	notes	Action
1	House 1	1	Room 1	4	2 bunks	<span style="color: red;">✖</span> <span style="color: red;">✖</span>
2	House 1	2	Room 2	3	1 bunk, 1 twin	<span style="color: red;">✖</span> <span style="color: red;">✖</span>
3	House 1	3	Room 3	3	1 bunk, 1 twin	<span style="color: red;">✖</span> <span style="color: red;">✖</span>
4	House 2	1	Handicapped Accessible	2	2 full	<span style="color: red;">✖</span> <span style="color: red;">✖</span>
5	House 2	2	Double Bunk	4	2 bunks	<span style="color: red;">✖</span> <span style="color: red;">✖</span>
6	House 2	3	Phase 2	2	2 full	<span style="color: red;">✖</span> <span style="color: red;">✖</span>

### Unit ✖

Unit Name

Unit Number of Beds

Unit Location

Unit Notes

Add
Cancel

### Room ✖

Unit

Room Number

Room Name

Room Number of Beds

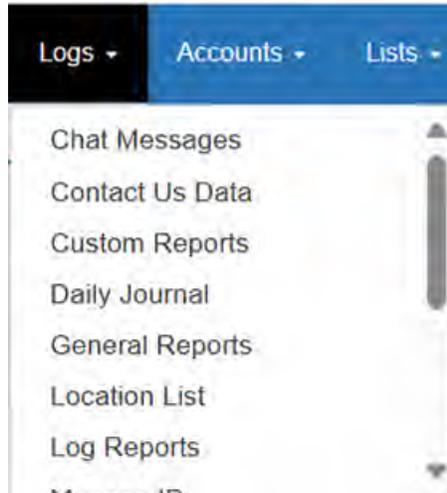
Room Notes

Add
Cancel

# Recovery House Software Manual

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 Client: Penny Sue Haynes

Filter: All (dropdown menu showing All, Group Chat, Private Chat)

PDF XLS Print

Show 50 entries

Search:

action	Sender	Receiver	Message	sent on
<a href="#">Delete</a>	Penny Haynes	Group General	Please put a name on Every Report. If it is a Pass Request, put the Length and Date of Pass 48 Hour Pass 12/30/2022 - 01/01/2023	12-28-2022 02:42 AM

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

# Recovery House Software Manual

## 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.	<b>Sent On:</b> 06/10/2022 12:38 pm <b>Source:</b> Thor Directory <b>Uploads:</b> <a href="#">Love-Lucy-shook.gif</a>	<a href="#">Mark Read</a> <a href="#">Delete</a>
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	<b>Sent On:</b> 05/23/2022 03:38 pm <b>Source:</b> Thor Directory	<a href="#">Delete</a>
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.	<b>Sent On:</b> 04/28/2022 12:24 pm <b>Source:</b> Friend	<a href="#">Delete</a>

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

# Recovery House Software Manual

Select Form:  Date From:  To Date:

PDF XLS Print

Show  entries

Search:

Report Id	Contact	Date Of Report	Name Of Reporting Staff	Date Of Test	Results Of Test	Notes	Types of Tests
3452	Bryan Swain	12/4/22	C. Williams	12/4/22	False positive for meth due to trazodone		
3453	Bryan Swain	12/04/22	C. Williams	12/04/22	Negative		
3472	Bryan Swain	12/14/22	C. Williams	12/11/22	Negative		
3473	Bryan Swain	12/14/22	C. Williams	12/11/22	Negative		
3486	James C. Ford	12/17/22	C. Williams	12/16/22	Negative		
3535	Bryan Swain	12/30/22	C. Williams	12/29/22	Negative		
3536	Andrew Miller	12/30/22	C. Williams	12/29/22	Negative		
3537	Jonathan Apple	12/30/22	C. Williams	12/29/22	Negative		
3538	William Probst	12/30/22	C. Williams	12/29/22	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

Journal for 12/30/2022

Include How Many Days Before Today: 7

Clients Without Journal Entries by 7 pm

(1)

CLASS/SESSION NAME: independent  
DATE/TIME: 12/30  
LEADER: jenny  
TODAY'S TOPIC: Completion  
WHAT I LEARNED: We learned about completion and how it affected our children. We also learned that the key to recovery is getting over the fear of change.

(5)

CLASS/SESSION NAME: devision  
DATE/TIME: 12/30/2022 05:01-07 am  
LEADER:  
TODAY'S TOPIC:  
WHAT I LEARNED: When we find that our strongly held views are clashing with the "the heavenly way" do not decide.

CLASS/SESSION NAME: team meeting  
DATE/TIME: 12/30/2022 02:00-03:00 pm  
LEADER:  
TODAY'S TOPIC:  
WHAT I LEARNED: The best way to solve issues which connecting to thousands of others.

CLASS/SESSION NAME: independent  
DATE/TIME: 12/30/2022 07:01-08 pm  
LEADER:  
TODAY'S TOPIC:  
WHAT I LEARNED: The key to recovery is overcoming change.

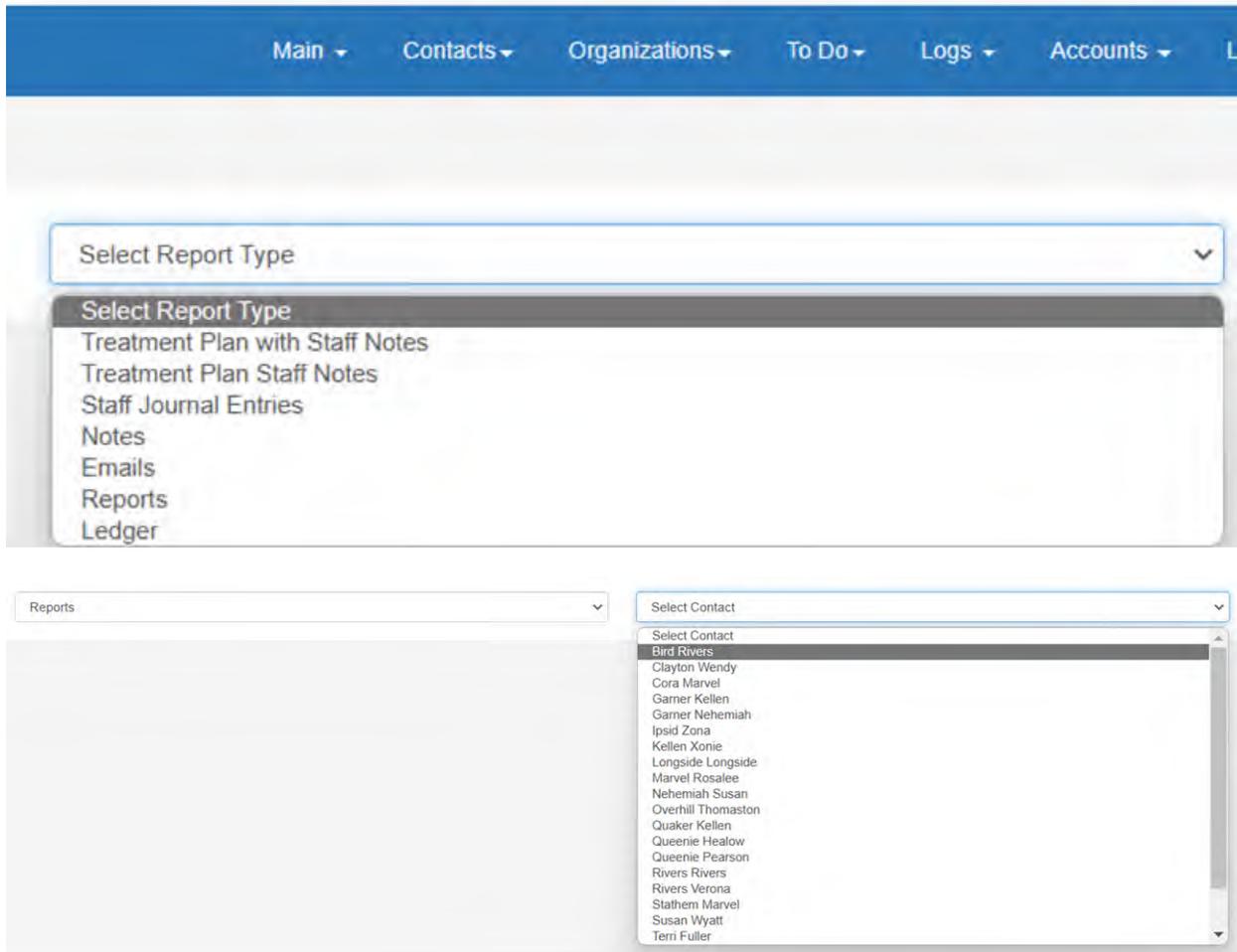
CLASS/SESSION NAME: devision  
DATE/TIME: 12/30/2022 05:08-10 am  
LEADER:  
TODAY'S TOPIC:  
WHAT I LEARNED: The life God places in us depends on our values, not virtues of the seed of Adam, but the virtue of Jesus Christ.

CLASS/SESSION NAME: free foundation  
DATE/TIME: 12/30/2022 07:00-10 am  
LEADER:  
TODAY'S TOPIC:  
WHAT I LEARNED: All we have to do is stay close to Him as we possibly can, and He will complete in us what He needs to accomplish.

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.

# Recovery House Software Manual

## General Reports



# Recovery House Software Manual

Reports: Reports | Garner Nehemiah

Print | Save as PDF

**Demo Recovery House**  
PO BOX 328, Holly Springs, GA 30142-0006

Notes Client: Garner Nehemiah Dated: 12/30/2022

Report Name: Monthly Progress Report

Client	Garner Nehemiah
Resident	Susie Queue
Month and Year	6/2022
Resident Phone or Cell or Email	Email
Resident Phone or Cell or Email Information	clients@recoveryhousesoftware.com
Staff Phone and/or email	Penny Haynes 678-459-2436 info@recoveryhousesoftware.com
Supervising Officer Name:	Officer Martin Dawes
Supervising Officer Email:	m.dawes@thismail.com

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

Assign Client Location

Filter By Client | Filter By Unit | Filter By Room | Clear Filters

PDF | XLS | Print

Show 50 entries

Search:

Id	Client	Unit	Room	Bed Number	Assign Date	Vacated Date	Notes
2	<a href="#">Cora M Marvel</a>	House 1	Room 1	2	04/01/2022		
3	<a href="#">Bird Rivers</a>	House 1	Room 2	1	04/01/2022		
6	<a href="#">Garner C. Nehemiah</a>	House 2	Double Bunk	1	04/01/2022		
5	<a href="#">Terri Fuller</a>	House 2	Phase 2	1	04/01/2022		
7	<a href="#">Susan B Wyatt</a>	House 3	1	1	04/01/2022		
9	<a href="#">Veronica L. Thomas</a>	House 3	2	2	04/01/2022		

Showing 1 to 6 of 6 entries  
Previous 1 Next

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

# Recovery House Software Manual

room before you move them to a new room, so the room is opened up for another client.

## Log Reports

The screenshot displays two log report sections. The top section is titled 'Actions Performed Log ( Add, Edit, Delete, Login & Logout)'. It includes a 'User' dropdown set to 'All', a 'Date Range' dropdown set to 'Today', and a 'Search' button. Below this are export options for PDF, XLS, and Print, and a 'Show 10 entries' dropdown. A search input field is present. The table below has columns: Contact, Table/File Name, Record Id, Action Performed, and Date. The data rows are as follows:

Contact	Table/File Name	Record Id	Action Performed	Date
James Mandi	LP	888	logout	12/30/2022 04:38 pm
James Mandi	LP	888	login	12/30/2022 04:37 pm
James Mandi	LP	1	login	12/30/2022 04:27 pm
James Mandi	LP	808	logout	12/30/2022 04:10 pm
James Mandi	Journal	23234	add	12/30/2022 04:00 pm

The second section is titled 'Page Visits Log'. It also has export options (PDF, XLS, Print), a 'Show 10 entries' dropdown, and a search input field. The table below has columns: Contact, Page Visited, and Date. The data rows are as follows:

Contact	Page Visited	Date
James Mandi	/log_reports.php	12/30/2022 04:47 pm
James Mandi	/Track_Location.php	12/30/2022 04:38 pm
James Mandi	/dashboard.php	12/30/2022 04:37 pm
James Mandi	/dashboard.php	12/30/2022 04:37 pm
James Mandi	/treatmentReport.php?clientContactId=388	12/30/2022 04:28 pm

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

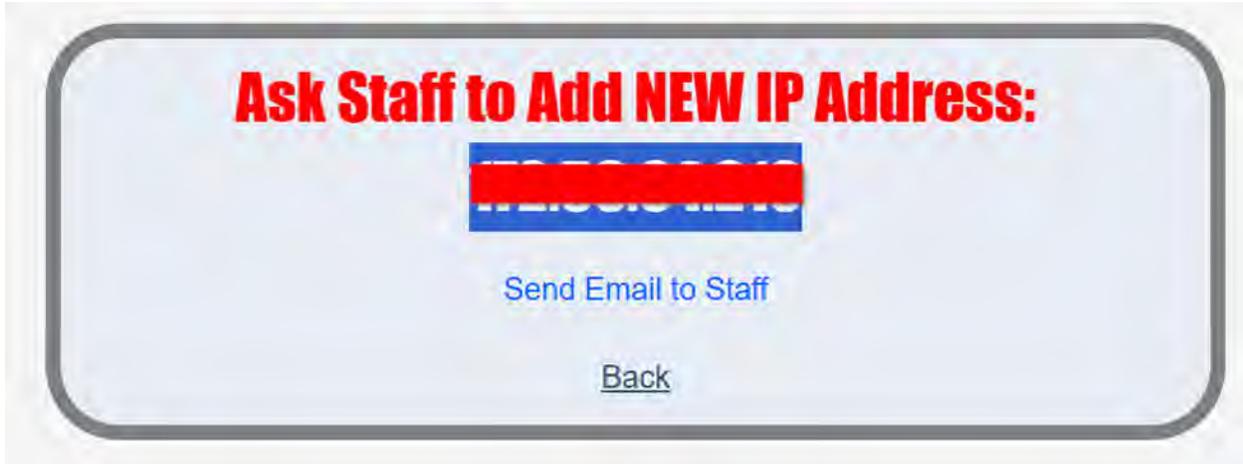
The screenshot shows a 'Manage IP' interface with an 'Add New IP Address' button at the top. Below is a table with two columns: 'action' and 'Allowed IP Address'. The data rows are as follows:

action	Allowed IP Address
Delete	76.97.69.44
Delete	50.42.216.120

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.

# Recovery House Software Manual

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.

A screenshot of a form titled "Add IP Address". The form has a white background and a blue border. At the top left, the title "Add IP Address" is displayed. Below the title, there is a text input field labeled "IP Address". At the bottom right of the form, there are two buttons: a green "Add" button and a white "Cancel" button.

This is where you add valid IP addresses.

## Medication

# Recovery House Software Manual

Action	Client	Medicine Name	Dosage	Route	Time	Adv Reaction	Ref Location	Ref Number	Ref Phone	Order Date	Pickup Date	Image
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Off</a>	Underhill D Fuller	Fluticasone Propionate	50 Mg	1 spray each nostril for 30 days.	07:24 AM	Glaucoma Cataracts	Good Sam's	677		06/21/2021	07/21/2021	
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Off</a>	Underhill D Fuller	Ondansetron	4 MG	Dissolve 1 tablet orally on tongue every 6 hours or as needed for nausea.	07:29 AM	headaches and constipation.	Good Sam's	677		06/01/2021	06/01/2021	
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">On</a>	Cora M Marvel	Bupropion HCL XL 150mg (Wellbutrin)	150mg	1 tablet by mouth daily	06:30 AM		jasper drug store	803		05/08/2022		

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

Add Medication

Select Client

Medicine Name

Medicine Dosage

Medicine Route

Medicine Times To Take

Time 1 Time 2 Time 3

Adverse Reaction

Refill Location

Refill Phone Number

Refill Number

Refill Order Date Refill Pickup Date

mm/dd/yyyy mm/dd/yyyy

Choose File No file chosen

Cancel Add

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

# Recovery House Software Manual

The screenshot shows a web form titled "Medication Admin". It includes a "Select Client" dropdown menu with "Bird Rivers" selected. Below that is a "Staff" dropdown menu with "admin" selected. The "Select Medicine, Name, Dosage, Route, Time" section contains two checkboxes, both of which are checked, with the following text: "pantoprazole sod DR, 40 mg, TAKE ONE TABLET BY MOUTH DAILY, 06:45 AM" and "CITALOPRAM HBR, 20 MG, TAKE ONE TABLET BY MOUTH DAILY, 06:45 AM". There are also text input fields for "Medicine Notes" and "Medicine Error". At the bottom right, there are "Cancel" and "Add" buttons.

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.

The screenshot shows a navigation bar with four blue buttons: "Add Medication", "Medication Admin", "Medication Admin Log", and "Multiple Medications". Below the buttons is a "Select Client" dropdown menu. Underneath the dropdown are three buttons: "PDF", "XLS", and "Print". Below these buttons is a "Show 50 entries" label with a dropdown arrow next to the number "50". At the bottom, there is a "Search:" label followed by a text input field.

# Recovery House Software Manual

Select Client

Bird Rivers  
Cora M Marvel  
Garner C Nehemiah  
Susan B Wyatt  
Terri Fuller  
Veronica L Thomas

Search:

	Notes	Staff	Error	Date
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Cora M Marvel	Bupropion HCL XL 150mg (Wellbutrin), 150mg, 1 tablet by mouth daily, 06:30 AM	admin	06/09/2022 01:16 AM
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Susan B Wyatt	HYDROCHLOROTHIAZIDE, 12.5 mg, Take one tablet by mouth every morning, 06:45 AM	s7	06/06/2022 08:11 AM
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Susan B Wyatt	LISINAPRIL, 20 mg, Take one tablet by mouth every morning, 06:45 AM	s7	06/06/2022 08:11 AM
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Susan B Wyatt	AMLODIPINE, 5 mg, Take one tablet by mouth every morning, 06:45 AM	s7	06/06/2022 08:11 AM
<input type="button" value="Edit"/>	Susan B Wyatt	TOPIRAMATE, 100 mg, Take one tablet twice daily, 06:45 AM	s7	06/06/2022 08:11 AM

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

Select Report Type

Current Client Information

SAMHSA  
Count of Intakes AND Departures  
Length of Stay  
Transitional Length of Stay  
Intake Only  
Current Client Information  
Current Transitional Client Information

Start Date

End Date

Select Contact Type

Current Client Information

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

# Recovery House Software Manual

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

Select Report Type: SAMHSA  
 Start Date:   
 End Date:   
 Select Contact Type:  Client  Past Client

### SAMHSA

#### Yearly Breakdown

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

Select Report Type: Count of Intakes AND Departure  
 Start Date: 01/01/2022  
 End Date: 12/31/2022  
 Select Contact Type:  Client  Past Client  
 Year Over Year:

### Annual Report of Clients

#### Monthly Breakdown

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

# Recovery House Software Manual

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.

# Recovery House Software Manual

## 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)	[REDACTED]	0.00	9.25	\$1000.00 , 10/05/2023		[REDACTED]	[REDACTED]
[REDACTED]	2	11/29/2022	12/29/2023	2 month(s),12 day(s)	[REDACTED]	0.00	2,067.64	\$1000.00 , 10/03/2023		[REDACTED]	[REDACTED]
[REDACTED]	2	01/11/2023	01/11/2024	2 month(s),25 day(s)	[REDACTED]	-2,342.78	10.00	\$500.00 , 10/03/2023	Working Scholarship	[REDACTED]	[REDACTED]
[REDACTED]	2	12/16/2022	01/16/2024	2 month(s),30 day(s)	[REDACTED]	-2,726.16	0.00	\$1000.00 , 10/05/2023	Loan	[REDACTED]	[REDACTED]
[REDACTED]	2	04/12/2023	04/12/2024	5 month(s),26 day(s)	[REDACTED]	-3,920.20	700.00	\$1500.00 , 10/03/2023	Loan	[REDACTED]	[REDACTED]
[REDACTED]	2	04/28/2023	04/28/2024	6 month(s),11 day(s)	[REDACTED]	-4.00	303.00	\$1000.00 , 09/27/2023		[REDACTED]	[REDACTED]

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

# Recovery House Software Manual

Start Date:  End Date:

## Ledger

Client	Item	Notes	Qty	Value	Total	Date	Link
IZ	Paycheck 1		1.00	472.53	472.53	04-01-2022	<a href="#">Check Note</a>
OT	Smith tool		1.00	515.21	515.21	04-01-2022	<a href="#">Check Note</a>
IZ	Therapy th		1.00	200.00	200.00	04-01-2022	<a href="#">Check Note</a>
OT	Permisson		1.00	410.80	410.80	04-01-2022	<a href="#">Check Note</a>
GCN	320-3207		1.00	474.59	474.59	04-01-2022	<a href="#">Check Note</a>
OT	Phone fu		1.00	100.00	100.00	04-04-2022	<a href="#">Check Note</a>
GCN	850 dental		1.00	500.00	500.00	04-04-2022	<a href="#">Check Note</a>
GCN	30 dollars		1.00	50.00	50.00	04-04-2022	<a href="#">Check Note</a>
OT	Permisson		1.00	286.00	286.00	04-04-2022	<a href="#">Check Note</a>
OT	Payment 6		1.00	810.80	810.80	04-03-2022	<a href="#">Check Note</a>
GCN	April prog		1.00	900.00	900.00	04-01-2022	<a href="#">Check Note</a>
BR	April Prog		1.00	900.00	900.00	04-01-2022	<a href="#">Check Note</a>
GAAP	April Prog		1.00	900.00	900.00	04-01-2022	<a href="#">Check Note</a>
OT	April Prog		1.00	750.00	750.00	04-01-2022	<a href="#">Check Note</a>
GCN	Woodwork		1.00	49.42	49.42	04-04-2022	<a href="#">Check Note</a>
CMF	April tool		1.00	900.00	900.00	04-01-2022	<a href="#">Check Note</a>

## Medication Admin

Client	Medicine Name	Dosage	Route	Time	Notes	Error	Date	Link
CMF	Lamictop	25 MG	Take one tablet by mouth twice daily	06:45 am			04-05-2022 06:36 am	<a href="#">Check Note</a>
CMF	PROPRANLOL	10 MG	TAKE ONE TABLET BY MOUTH TWICE DAILY	08:45 am			04-05-2022 06:36 am	<a href="#">Check Note</a>
CMF	FLUXETINE	10 MG	TAKE ONE TABLET BY MOUTH DAILY EVERY MORNING	06:45 am			04-05-2022 06:36 am	<a href="#">Check Note</a>
IZ	LIENOPRI	10 MG	TAKE 1 TABLET BY MOUTH DAILY	06:45 am			04-05-2022 06:36 am	<a href="#">Check Note</a>
IZ	HYDROCHLOROT	12.5 mg	TAKE ONE TABLET BY MOUTH DAILY	08:45 am			04-05-2022 06:36 am	<a href="#">Check Note</a>
BR	NAIPROFEN	500 MG	TABLETS, TAKE TWICE DAILY WITH MEALS	08:45 am			04-05-2022 06:36 am	<a href="#">Check Note</a>
BR	penicillinsic acid DR	40 mg	TAKE ONE TABLET BY MOUTH DAILY	08:45 am			04-05-2022 06:36 am	<a href="#">Check Note</a>
BR	CITALOPRAM HBR	20 MG	TAKE ONE TABLET BY MOUTH DAILY	06:45 am			04-05-2022 06:36 am	<a href="#">Check Note</a>
CW	LevETHAcocam	1000 mg	Take one tablet by mouth twice a day	08:45 am			04-05-2022 06:36 am	<a href="#">Check Note</a>

## Sign out History

Client	Organization	Location	Departure Date Time	Arrival Date Time	Reason	Link
GCN		IZ	04-05-2022 05:23 pm	04-05-2022 06:08 pm	leave	<a href="#">Check Note</a>
OT		jeppan	04-05-2022 05:22 pm	04-05-2022 07:06 pm	CR	<a href="#">Check Note</a>
BR		Church	04-05-2022 05:06 pm	04-05-2022 07:53 pm	Celebrate Recovery	<a href="#">Check Note</a>
CW		jeppan	04-05-2022 05:08 pm	04-05-2022 08:07 pm	pr	<a href="#">Check Note</a>

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

# Recovery House Software Manual

The screenshot displays the software interface for managing refrigerators and freezers. On the left, there is a list of appliances with columns for Action, Type, and Location. Each entry includes 'Edit' and 'Delete' buttons, a status indicator (e.g., 'On'), and the location description. On the right, there is a 'Temperature' log section with buttons for 'Add Temperature', 'Export PDF', and 'Print'. Below these are filters for PDF, XLS, Print, and CSV, a 'Show 10 entries' dropdown, and a search box. The temperature log table has columns for Type, Temp Date, Temperature, and Action (Edit/Delete).

Action	Type	Location
Edit Delete	Refrigerator On	Client fridge in pantry
Edit Delete	Refrigerator On	Short Fridge by pantry door
Edit Delete	Freezer On	Low deep freezer next to double door fridge.
Edit Delete	Refrigerator On	Double door refrigerator in pantry
Edit Delete	Freezer On	Large freezer against far wall on the right in pantry
Edit Delete	Refrigerator On	Upstairs Kitchen

Type	Temp Date	Temperature	Action
Refrigerator in Short Fridge by pantry door	10/29/2022	9	Edit Delete
Refrigerator in Upstairs Kitchen	10/29/2022	37	Edit Delete
Refrigerator in Double door refrigerator in pantry	10/29/2022	37	Edit Delete
Freezer in Large freezer against far wall on the right in pantry	10/29/2022	8	Edit Delete
Freezer in Low deep freezer next to double door fridge.	10/29/2022	5	Edit Delete

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.

# Recovery House Software Manual

Add Temperature

Temperature Date  
mm/dd/yyyy

Refrigerator in Client fridge in pantry  
37

Refrigerator in Short Fridge by pantry door  
9

Freezer in Low deep freezer next to double door fridge.  
5

Refrigerator in Double door refrigerator in pantry  
37

Freezer in Large freezer against far wall on the right in pantry  
8

Refrigerator in Upstairs Kitchen  
37

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

All

### Sign Out Data

PDF XLS Print

Show 100 entries

Search:

Client	Organization	Location	Reason	Departure Date & Time	Return Date & Time	Arrival Date & Time
Gamer 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

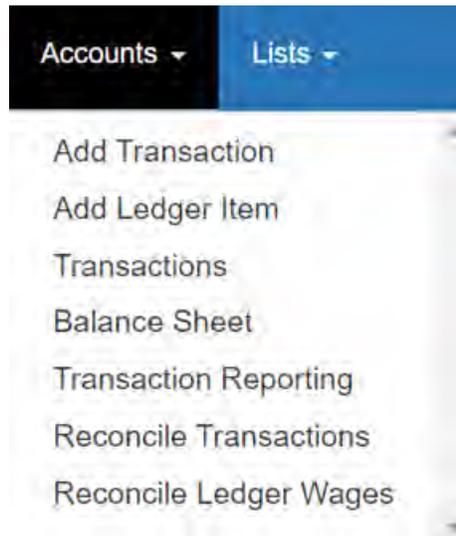
# Recovery House Software Manual

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

---

## ACCOUNTS

---



Add Transaction

# Recovery House Software Manual

[Add a new record](#)

## Transactions for ■

Entry Type :	<input type="text"/>	<a href="#">Add</a>
Organization :	<input type="text"/>	<a href="#">Add</a>
Address :	<input type="text"/>	<a href="#">Add</a>
Payment Contact :	<input type="text"/>	<a href="#">Add</a>
Invoice Number:	<input type="text"/>	
Sent Date	<input type="text" value="mm/dd/yyyy"/>	
Amount	<input type="text"/>	
In Kind	<input type="text"/>	
Paid Date	<input type="text" value="mm/dd/yyyy"/>	

Payment Type :	<input type="text"/>	<a href="#">Add</a>
Documentation Received :	<input type="text"/>	<a href="#">Add</a>
Documentation Stored :	<input type="text"/>	<a href="#">Add</a>
Notes:	<input type="text"/>	
Contact :	<input type="text"/>	<a href="#">Add</a>
Ledger :	<input type="text"/>	<a href="#">Add</a>
Transaction Categories :	<input type="text"/>	<a href="#">Add</a>
Reconciliation Date	<input type="text"/>	
Staff Username	<input type="text" value="phaynes"/>	
Added On:	<input type="text" value="10/17/2023 10:19:14 am"/>	

[Submit](#)

# Recovery House Software Manual

## **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

# Recovery House Software Manual

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**

# Recovery House Software Manual

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.

# Recovery House Software Manual

## 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
<a href="#">2064</a>	Merchant Fees	<a href="#">ypal</a>		<a href="#">Bella Verona</a>		05/01/2022	-2.00	0.00	05/02/2022	Paypal	Paypal		\$100 venmo \$2 fees
<a href="#">2063</a>	Donation	<a href="#">e.Ham</a>		<a href="#">Bella Verona</a>		05/01/2022	100.00	0.00	05/01/2022	Venmo	Bank Statement		Venmo \$100 \$2 fees
<a href="#">2062</a>	Payment	<a href="#">Daws</a>		<a href="#">Anthony Persephone</a>		12/13/2022	-100.00	0.00	12/13/2022				

View, search, sort, export and print transactions.

# Recovery House Software Manual

## Balance Sheet

Balance Sheet for 2022: 1/1/22-12/31/22					Balance Sheet for 2021: 1/1/21-12/31/21				
Income					Income				
Cash Donation	In Kind Donation	Receivables	Receivables Due	Total Cash Received	Cash Donation	In Kind Donation	Receivables	Receivables Due	Total Cash Received
\$20,437.00	\$0.00	\$11,889.41	\$0.00	\$32,326.41	\$19,848.00	\$0.00	\$0,442.10	\$0.00	\$20,290.10
Expenses					Expenses				
Accounts Paid		AP Due	Ledger Monies Owed		Accounts Paid		AP Due		
\$18,800.00		\$0.00	\$1,526.41		\$18,800.00		\$0.00		
Balances					Balances				
Cash Balance		Projected Balance			Cash Balance		Projected Balance		
\$13,527.00		\$4,509.00			\$1,000.00		\$1,290.10		

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).

Current Clients							
<b>Bird Rivers</b>		<b>Cora M Marvel</b>		<b>Garner C Nehemiah</b>		<b>Susan B Wyatt</b>	
Ledger Balance With Wages	\$-144.11	Ledger Balance With Wages	\$-986.56	Ledger Balance With Wages	\$-1,077.88	Ledger Balance With Wages	\$1,394.55
Ledger Balance without Wages	\$-144.11	Ledger Balance without Wages	\$-986.56	Ledger Balance without Wages	\$-1,150.04	Ledger Balance without Wages	\$1,394.55
Wages Balance	\$0.00	Wages Balance	\$0.00	Wages Balance	\$72.16	Wages Balance	\$0.00
<b>Terri Fuller</b>		<b>Veronica L Thomas</b>					
Ledger Balance With Wages	\$-950.00	Ledger Balance With Wages	\$-909.69				
Ledger Balance without Wages	\$-950.00	Ledger Balance without Wages	\$-909.69				
Wages Balance	\$0.00	Wages Balance	\$0.00				
Past Clients							
<b>Clayton Wendy</b>		<b>Ipsid Zona</b>		<b>Kellen L Xonie</b>		<b>Longside R Longside</b>	
Ledger Balance With Wages	\$-3,729.60	Ledger Balance With Wages	\$3.03	Ledger Balance With Wages	\$-50.00	Ledger Balance With Wages	\$-3,272.26
Ledger Balance without Wages	\$-3,729.60	Ledger Balance without Wages	\$3.00	Ledger Balance without Wages	\$-50.00	Ledger Balance without Wages	\$-3,272.26
Wages Balance	\$0.00	Wages Balance	\$0.03	Wages Balance	\$0.00	Wages Balance	\$atur\$0.00December

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.

# Recovery House Software Manual

## Transaction Reporting

The screenshot shows a web interface for Transaction Reporting. At the top, there are several filter fields: Start Date (04/01/2022), End Date (04/30/2022), Account (Transactions), Type (All), Sort By, Total By, Filter by Category, Filter by Contact, Filter by Organization, Search Details For, and checkboxes for Summaries (Hide Details) and Newest To Oldest. A Submit button is located below the filters. Below the filters, there are export options: PDF, XLS, and Print. A search bar is present with the text 'Show 50 entries'. The main part of the screenshot is a table with the following columns: ID, Entry Type, Inv / Check #, Amount, In Kind Amount, Paid Date, Organization, Contact, Category, Payment Type, Notes, Contact, and Record Date. The table contains several rows of transaction data.

ID	Entry Type	Inv / Check #	Amount	In Kind Amount	Paid Date	Organization	Contact	Category	Payment Type	Notes	Contact	Record Date
1322	Payment		73.48	0.00	04/03/2022	oger	Garner Wyatt	Operations: Groceries - Expenses	Debit Card			04/06/2022
1323	Payment		107.84	0.00	04/03/2022	od_Sa	Admin Depts	Facilities and Equipment: Automobile Expense: Fuel - Expenses	Debit			04/06/2022
1325	Received		810.60	0.00	04/03/2022	litas	Overnight Transactions	Program Income: Program Service Fees: Tuition - Income	Online Banking		Overnight Transactions	04/06/2022
1333	Payment		141.13	0.00	04/03/2022	litas	Loganville Quaker	Operations: Groceries - Expenses	Debit Card			04/06/2022
1331	Payment		70.00	0.00	04/03/2022	sc2	Loganville Quaker	Facilities and Equipment: Automobile Expense: Fuel - Expenses	Debit Card			04/06/2022
2445	Deposit		30.00	0.00	04/03/2022	od_Sa	Garner Payment	Direct Public Support Indirect Business Contributions - Income	Deposit			04/06/2022

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

Unreconciled Transactions (141 Records / \$-16,241.86)

Reconciled Transactions (1630 Records / \$37,802.20)

Total Transactions Balance: \$21,560.34

MARK AS RECONCILED

Credits: 150.00 **Statement Credits:** 14321.00 **Credit DIFFERENCE:** -14171.00

Debits: -401.07 **Statement Debits:** -9876.54 **Debit DIFFERENCE:** 9475.47

Beginning Balance: 37802.20 | Total: 37551.13 New Ending Balance \$ 42246.66

Merchant Fees Sum:

The screenshot shows the Reconcile Transactions interface. At the top, there are export options: PDF, XLS, and Print. A search bar is present with the text 'Show 50 entries'. The main part of the screenshot is a table with the following columns: ID, Category, Entry Type, Inv / Check #, Amount, Paid Date, Organization, Contact, Payment Type, Notes, and Contact. The table contains two rows of transaction data.

ID	Category	Entry Type	Inv / Check #	Amount	Paid Date	Organization	Contact	Payment Type	Notes	Contact
1907 -174.26	Operations: Groceries - Expenses	Payment		-174.26	04/28/2022	oger	Garner Wyatt	Debit Card		
1908 -49.00	Other Types of Expenses: Paid for Client: Client Medical - Expenses	Payment		-49.00	04/29/2022	od_Sa	Garner Wyatt	Debit Card		Quaker L Kellen

# Recovery House Software Manual

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.

## Recovery House Software Manual

- 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).

# Recovery House Software Manual

- 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

Unreconciled Wages (8 Records / \$-2,524.70)

Reconciled Wages (202 Records / \$2,597.89)

Total Wages Balance: \$73.19

MARK AS RECONCILED

Credits:  Statement Credits:  Credit DIFFERENCE:

Debits:  Statement Debits:  Debit DIFFERENCE:

Beginning Balance: 2597.89 | Total:  New Ending Balance \$ 0

Merchant Fees Sum:

PDF XLS Print

Show 50 entries

Search:

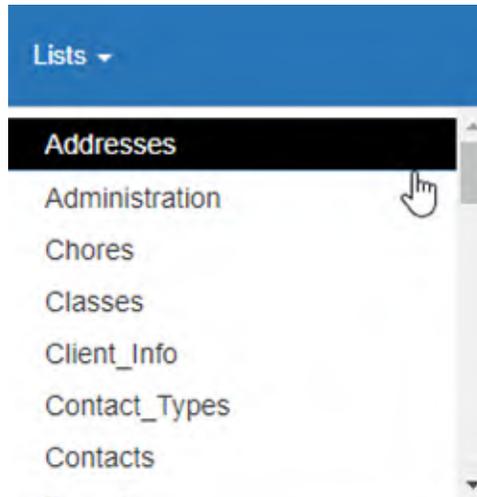
ID	Item Total	Item Date	Item Type	Item Notes	Contact
<a href="#">673</a> <input type="checkbox"/>	0.00	05/07/2022	Client Job Wages Deposited in <input type="text"/> Monies deposited into <input type="text"/> account on behalf of Client. 0.00	Payroll	<a href="#">Garner, C. Nehemiah</a>
<a href="#">675</a> <input type="checkbox"/>	-900.00	05/23/2022	Client Withdrawal From Bank Account Monies taken out of the <input type="text"/> Resident Account 0.00	Permission	<a href="#">Garner, C. Nehemiah</a>
<a href="#">683</a> <input type="checkbox"/>	-150.00	05/30/2022	Client Withdrawal From Bank Account Monies taken out of the <input type="text"/> Resident Account 0.00	Money for	<a href="#">Garner, C. Nehemiah</a>

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.

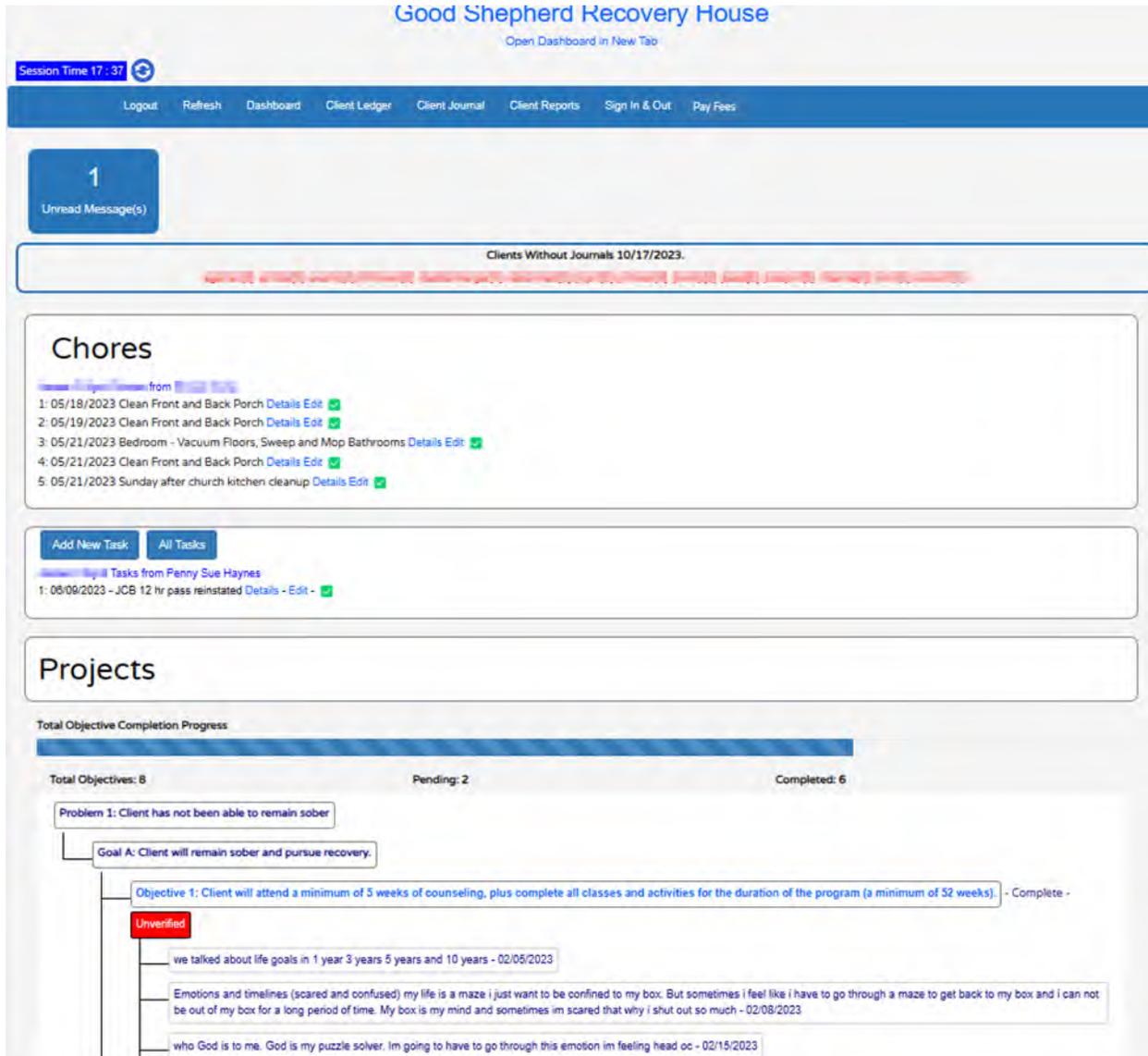
You can select the number of entries, or rows, to display.

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.

## Recovery House Software Manual

- 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.

# Recovery House Software Manual

## 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 tufti	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).

# Recovery House Software Manual

## Add Ledger Item

[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

Contact ID:

Item ID:

Item Notes:

Item Total:

Item Date:

Ledger Reconciliation Date:

Staff Username:

[Submit](#)

The client can add monetary records to their Ledger.

## Client Journal

You may view your own Journal entries, add to your Journal, 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](#)

Journal for Cora Marvel

Journal ID	Contact ID	Staff Username	Journal Notes	Journal Date Time
11	Cora M Marvel	s484	CLASS/SESSION NAME: Group Counseling DATE/TIME: 6/8/2022 3 pm LEADER: Penny TODAY'S TOPIC: Tapping WHAT I LEARNED: We desensitized ourselves from things that set us off.	06/10/2022 12:14:54 pm
10	Cora M Marvel	s484	CLASS/SESSION NAME: Bible Study DATE/TIME: 6/5/2022 3 pm LEADER: Pastor Jerry TODAY'S TOPIC: The Spirit WHAT I LEARNED: I found out that I have a spirit that connects to and communicates with God's Spirit.	06/10/2022 12:14:11 pm

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

# Recovery House Software Manual

## Add Journal

You may view your own Journal entries, add to your Journal, 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](#)

Journal for Cora Marvel

Contact ID:	Cora Marvel
Staff Username:	s484
Journal Notes:	<p>CLASS/SESSION NAME: DATE/TIME: LEADER: TODAY'S TOPIC: WHAT I LEARNED:</p>
Journal Date Time:	12/31/2022 08:27:41 pm
<input type="button" value="Submit"/>	

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

## Client Reports

[Add New Report](#)

Report ID	Report Name	Details	Creator	Created On	Form	DOB	Intake Date	Discharge Date
4	Pass	Permission Received read more... From Probation Officer: Yes Date of Report: 8/19/2022 Reportin read more...	s484	06/10/2022	Overnight Pass Request	06/21/1982	02/19/2022	

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

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The image shows two side-by-side forms. The left form, titled 'Report Form', has several input fields: 'Report ID' (7), 'Form ID' (Overnight Pass Request), 'Report Name' (Overnight Pass Request 12/29/2022 - 12/31/2022), 'Report Creator' (Overnight Pass Request 12/29/2022 - 12/31/2022), 'Report Created Date' (01/01/2023), 'Include DOB (Leave BLANK for NC)' (06/21/1982) with a 'Fetch DOB' button, 'Include Intake Date' (02/19/2022) with a 'Fetch Intake Date' button, and 'Include Discharge Date' (mm/dd/yyyy) with a 'Fetch Departure Date' button. A green 'Submit' button is at the bottom. The right form, titled 'Report Detail Form', has a dropdown for 'Permission Received From Probation Officer', and text boxes for 'Date of Report', 'Reporting Staff', 'Requested Date(s) of Pass', 'Reason for Request', 'Contact Name', 'Contact Phone', 'Contact Email', and 'Contact Address'. It also has a larger text area for 'Notes' and a field for 'Authorized By & Date'. A blue 'Submit Responses' button is at the bottom.

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

## Sign In & Out

The image shows a 'Sign In and Out' form. It has a title 'Sign In and Out' at the top. Below the title are five input fields: 'Organization' (dropdown menu with '&d' selected), 'Location' (text box with '5 C TR Ga 30175'), 'Reason' (text box with 'work'), 'Return Date' (calendar icon, text box with '01/01/2023'), and 'Return Time' (clock icon, text box with '08:34:53 AM'). At the bottom of the form are two green buttons: 'Sign Out' and 'Sign Out History'.

# Recovery House Software Manual

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.

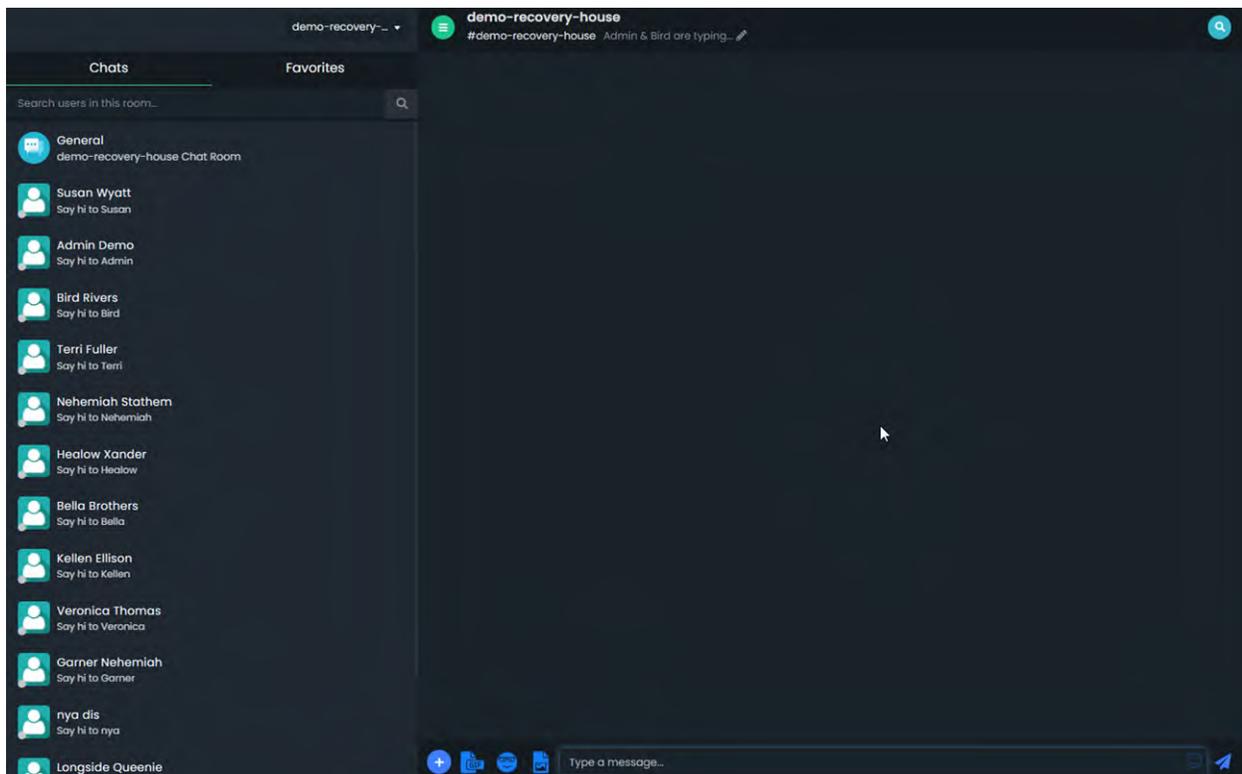
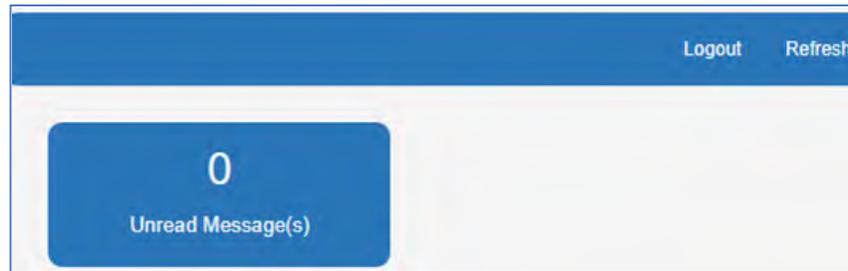


They can also review their Sign Out History.

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

# Recovery House Software Manual

## 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.

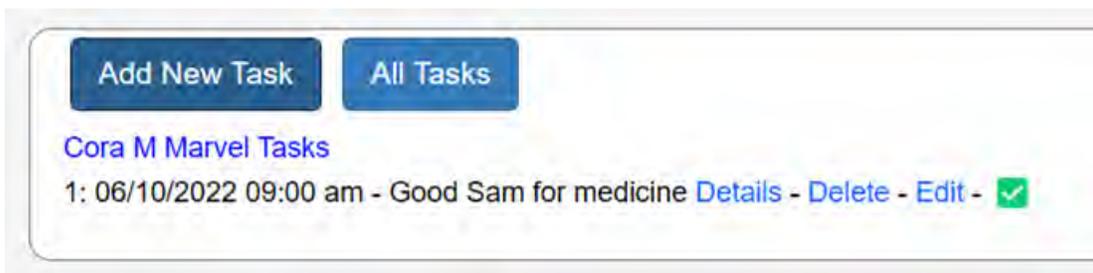
## Chores

# Recovery House Software Manual



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.

# Recovery House Software Manual

## Projects



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

## Treatment Plan

Total Objective Completion Progress

Total Objectives: 4      Pending: 3      Completed: 1

Problem 1: Client is unable to remain sober.

Goal A: Client will remain sober.

Objective 1: Client will complete all counseling, classes and activities for 52 weeks. - Pending - Unverified

So far I've complete 4 weeks of classes - 03/21/2022

I've completed a total of 12 weeks of classes - 05/17/2022

Problem 2: Client has not found a satisfying career.

Goal A: Client will find a satisfying career

Objective 1: Client will research possible vocations using <https://www.mynextmove.org/explore/ip>. She will create a list of the vocations that most interest her, and what she would need to obtain these jobs, and add that to her Treatment Plan. - Complete - Unverified

I have done the survey on mynextmove.com and printed out the results. I've narrowed down some careers I am interested in. - 04/08/2022

Objective 2: Client will determine which vocations to pursue, and detail a plan to obtain those jobs to her treatment plan. - Pending - Unverified

Objective 3: Client will detail her activities to obtain her job. - Pending - Unverified

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.

# Recovery House Software Manual

The screenshot shows a web interface for adding progress notes. At the top, there is a dark blue header with the text "Progress Notes". Below this, the following text is displayed:

- Problem:** Client has not found a satisfying career.
- Goal :** Client will find a satisfying career
- Objective :** Client will determine which vocations to pursue, and detail a plan to obtain those jobs to her treatment plan.

Below the text, there are two input fields:

- Client Name** Cora M Marvel
- User Name** Cora M Marvel

A green button with a plus icon and the text "Add Progress Note" is visible. Below this, there is a table with the following structure:

Progress Notes	Created On

Below the table, there is a checkbox labeled "I have completed this Objective" and a blue "Save" button.

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.

The screenshot shows a dialog box titled "Add Progress Note". It has a close button (X) in the top right corner. The main content area is labeled "Progress Note" and contains a large text input field. At the bottom of the dialog, there are two buttons: a green "Add" button and a grey "Cancel" button.

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

# Recovery House Software Manual

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