Guidelines for Entering Database Information

Client Record

- When entering a client address, the browser may prompt you with the address you want. If you select the prompt, you must be very careful. Be sure the browser did not change the client name or any other info you have typed in. The browser may insert a home phone number for the client; it will not be correct.
- Always enter the client's phone number in the Home Phone field. Do not enter the primary number in the Cell Phone field. The reports all pick up the Home Phone. Enter phone numbers as xxx-xxx-xxxx.
- Date of birth must be entered mm/dd/yyyy. You do not enter Age. It is computed when you save the record.
- If an intake form does not contain an apartment name, go to the Apartment Report and sort on Address. Be sure to save the client record information you have entered or you risk losing it. If the address is not in the Apartment Report, you may have to Google the address to find the apartment name. The disadvantage of this is sometimes Google contains old information. The apartment name may have changed.
- You do not enter the Apartment phone number. It is picked up from the apartment file.
- In the Lease Verified field, enter the expiration date of the lease we have in our folders.
- We don't care what "Language Spoken at Home". If we have a client that does not speak English, we select the appropriate selection in this field. That way interviewers will know to pass that client to a Spanish speaking person.
- If there is something special about a client, enter the first and last names in upper case. Then in the comments indicate what is special about this client. The reason we do this is the appointment desk uses the "Online Card File". This report does not display the comment field. The upper case name will alert the person to look at the client record for important information.

History Record

- When entering a history record for a voucher (Rent or Electric), the history record should be created and entered on the date the voucher was issued. The date the voucher was paid is later in the record.
- NO SHOW. If a client no shows, a history record should show the appointment with the interviewer name marked as NO SHOW. No family information should be in the record.
- WALK IN. A walk in is a friend who shows up without an appointment and is not interviewed. That friend gets groceries only. Enter WALK IN in the interview name field, enter the family information, and the number of bags.
- The "Other" field in the history record is a place to record financial assistance that does not fit in any other field. For example, a $50 gift card would get a 50 in that field. In the comments you might explain what is in that field. It is a numeric field; do not put non numeric information in it.

- Enter diaper information in the comments. You do not need to enter the size. Do not enter diaper information in the “Other” field.
- The box at the bottom of the record is filled out by the person who writes a check to make a payment. The top portion of this box is for rent to an apartment. The bottom portion is for any other payment.

Apartment Record

- If the apartment name begins with the word “The”, we drop that word. So if the name was “The Nightmare on Audelia” we would enter the name as “Nightmare on Audelia”.
- When entering an apartment record, you may not have all the information. However, you should have (or get) the address, city & zip.   ***<This needs expansion>***

Validating What You Entered

- If you are entering History records, it is always desirable that you display what you have entered via Aid Report2. Errors tend to be very visible in that report.