> CLOSING the GAP <

Organization Owner Quick Start Guide

As an owner, you can add new clients and advocates to the system, assign advocates to clients, update client and advocate profiles, and view and upload documents to client profiles. This quick start guide provides brief summaries of each of these functions. For more detailed information, please refer to the corresponding section of the full User Guide.

1) Add a New Client

a. Go to the “Clients” section of your account dashboard
b. Click on “Sign Up Clients” and enter client’s information
c. Click the “Add Client” button to complete the process
d. To confirm the creation of the new client’s account, click on “[Organization Name] Clients”
e. Change the case type to “Unassigned Open Cases” and search for the new client’s name in the list

2) Add a New Advocate

a. Go to “Your Account” on your account dashboard
b. Click on “[Organization Name] Profile”
c. Click “Add Members” or click “[Organization Name] members” then “Add Members”
d. Enter in the advocate information and click “Add Member”

3) Assign an Advocate to a Client

a. Click on a client’s name in the clients list
b. Click the “Assigned Advocate” drop-down
c. Select an advocate from the list
d. The assignment is complete as soon as you select the advocate in the list
e. The system automatically generates e-mails to the advocate and client to notify them of the assignment

4) Update a Client Profile

a. Go to the “Clients” section of your account dashboard
b. Select “[Organization Name] Clients”
c. Select a client from the list and click “Edit”
d. Update the client information and click “Save”

5) Update an Advocate Profile

a. Go to the “Your Account” section of your account dashboard
b. Click on “[Organization Name] Profile”
c. Select “[Organization Name] Members”
d. Select the member to update and click “Edit”
e. Update the advocate information and click “Save”

6) View Client Documents

a. Navigate to “Clients”
b. Select “[Organization Name] Clients”
c. Select a client from the list
d. Click on “Client File” to view case related files

7) Upload Client Documents

a. Go to the “Clients” section of your account dashboard
b. Click on a client’s name to open their profile
c. Click on “Client Files”
d. Click the “Browse…” button and select a file
e. Click the “Upload File” button

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