Administry Documentation

Release 2.3

Willard Solutions, LLC

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CONTENTS:

Administry makes day-to-day ministry easier. Administry allows you to instantly see a client's entire history with your organization, including pledge history, notes left by fellow caseworkers, and all of their contact information. No more searching through clumsy spreadsheets every time someone calls you for help!

Administry makes data analysis easier. Administry helps you communicate more effectively with donors and other stakeholders by showing you exactly how much money you've disbursed over time. It organizes pledges by category, vendor, even zip code so you can understand where your clients' true needs are.

Download this user guide as a PDF

CHAPTER

ONE

GETTING STARTED

Log in to Administry

To access Administry, you need login credentials. Ask your organization's officers or other leaders for more information. They will create an account for you and email you with a username and password. You will also need an Agency ID, a short number that uniquely identifies your agency. Please note that a valid email address is required to use Administry.

Once you have your login credentials, *log in!* Be sure to *update your password* as soon as possible.

After successfully logging in, you should see the Dashboard. This screen puts several important pieces of information at your fingertips – your recent clients, a list of caseworkers currently on call, a list of downloadable resources, and key stats about your agency's work.

Set up Your environment

(Administrators should complete these steps!)

1. *Review Administry settings*.
2. *Set up users*.
3. *Set up funds*.
4. *Add Vendors*.
5. *Add Services*.

Working with Clients

1. *Search for a client*.
2. *View information about a client*.

3. *Add a new client*.
4. *Add a new pledge*.
5. *Add an action*.
6. *Add notes* for other caseworkers.
7. *Add client flags*.

Approving and Printing Pledges

1. *Approve pledges*.
2. *Print pledge requests*.

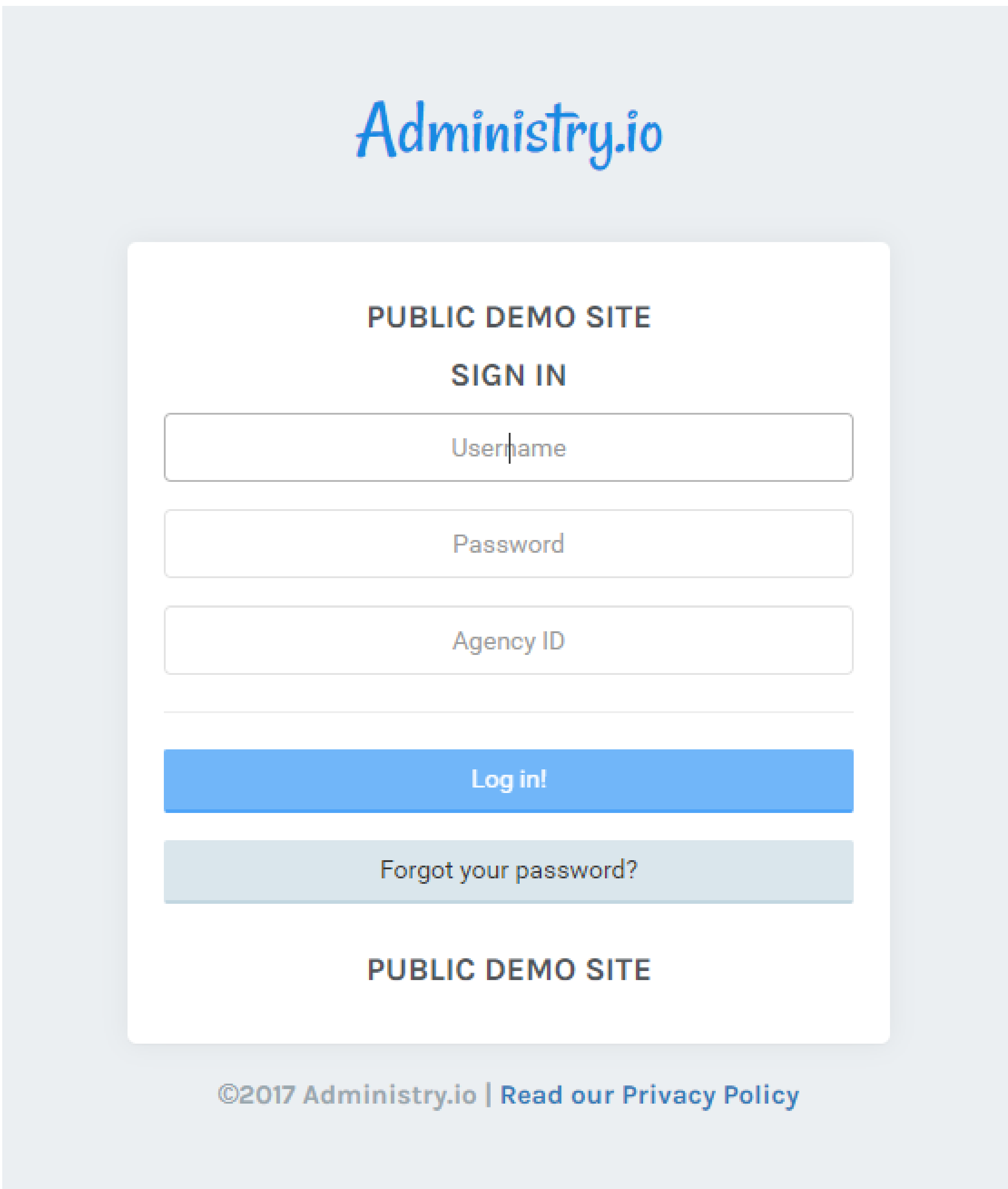
View Reports

1. *View reports*

CHAPTER

TWO

LOG IN TO ADMINISTRY



1. Open up your favorite internet browser (we recommend Google Chrome) and navigate to **www.administry.io**
2. Enter your credentials. The Agency ID is provided by your administrator.
3. Click Log In
4. *Change your password!*

Forget your password? Click the Forget Password link on the login screen. You will be prompted to enter your username, email address and agency ID. If this information matches what we have on file, Administry will automatically reset your password and email it to you.

Note: Users may be locked out after too many incorrect login attempts. Contact your agency administrator if you forget your password.

Log out of Administry

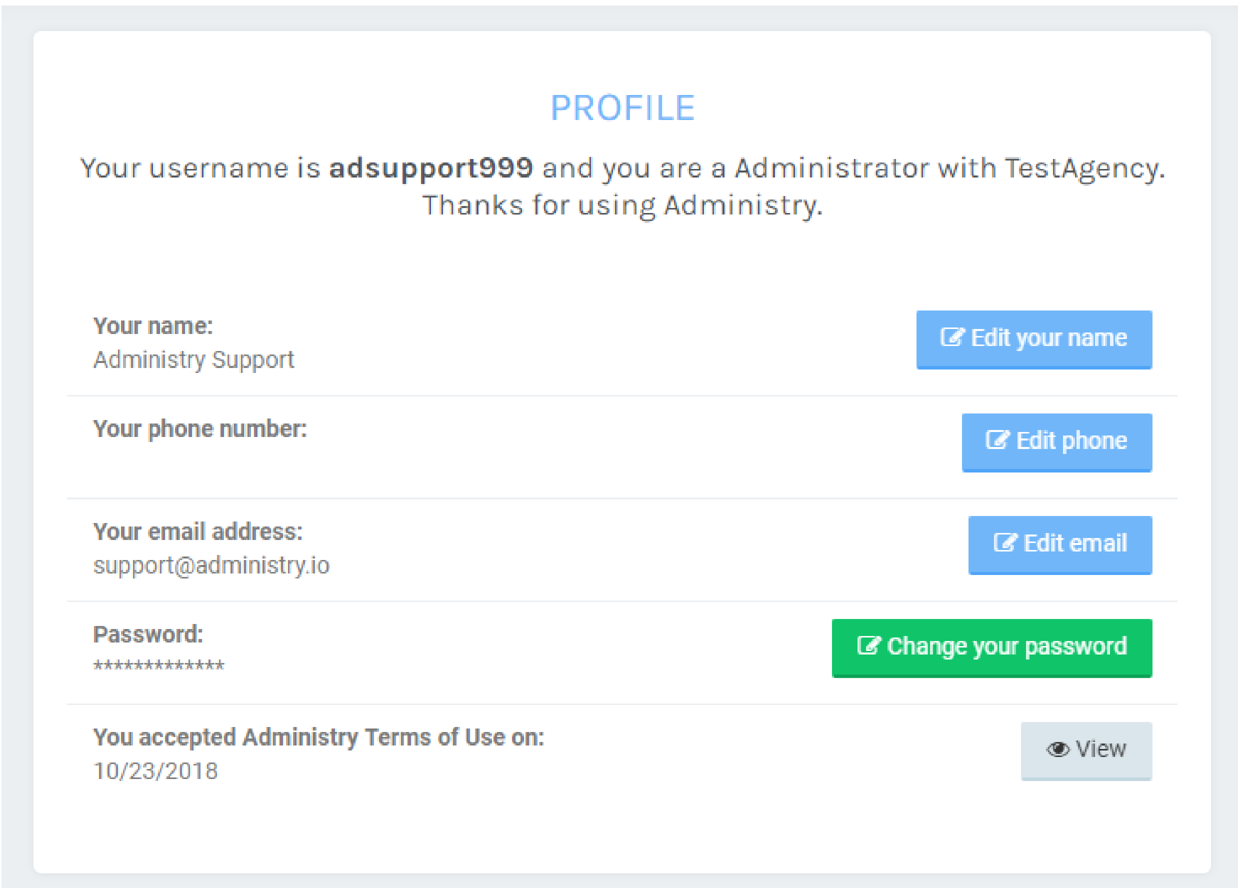
Be sure to log out of Administry when you are finished using it. Click on the user icon in the top right corner of the screen. Then in the dropdown menu, click on Log out.

Note: Users are automatically logged out when they are inactive for an extended period of time.

CHAPTER

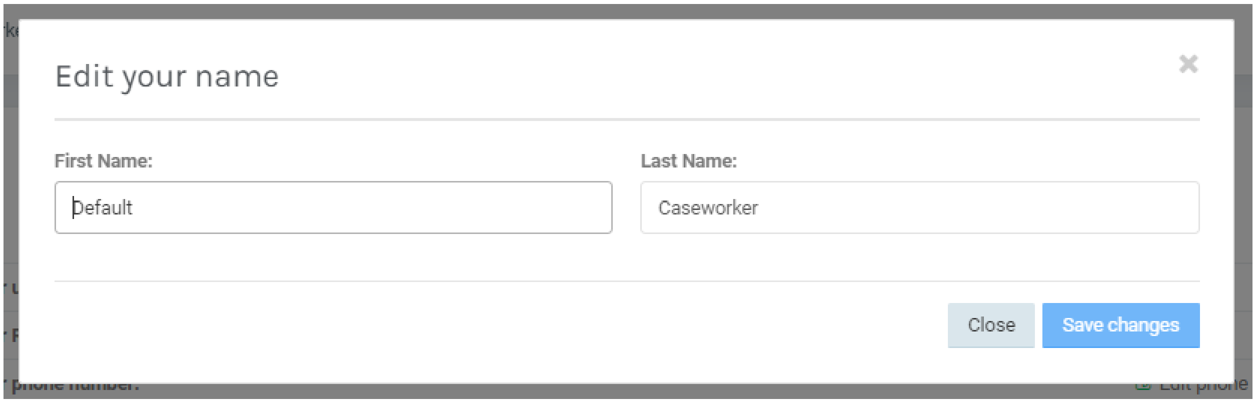
THREE

USER PROFILE



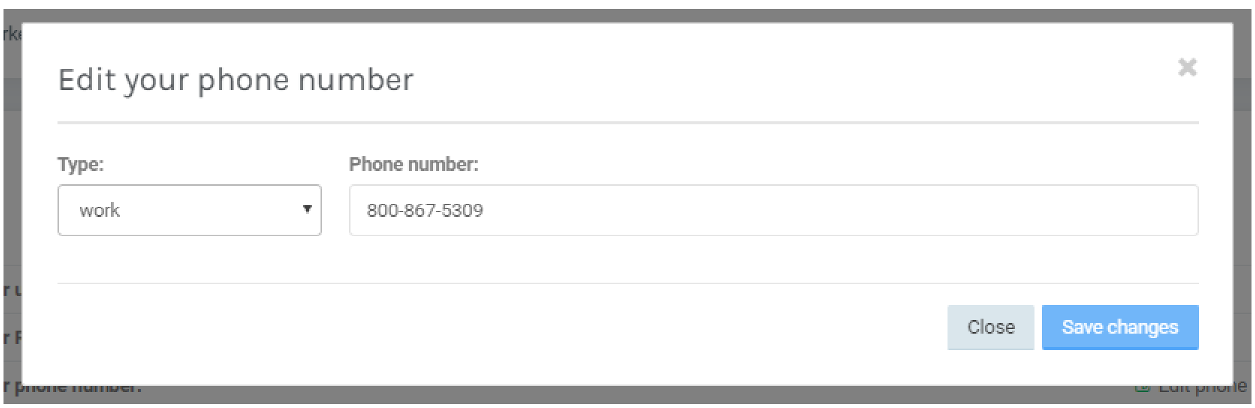
Each user has a profile that contains several important pieces of information. To view your user profile, click on the user icon in the top right corner of the screen. Then in the dropdown menu, click on My Profile.

Changing your display name



Click on 'Edit your Name' to change how your name appears in Administry. You must enter both a first and a last name. Users may not change their username. Only administrators may *change user roles*.

Changing your phone number



Your phone number is displayed to other caseworkers, and is helpful if they need to reach you when you are on call. Phone numbers are never shared outside of Administry.

- A valid 10-digit (including area code) phone number is required
- Phone number type defaults to Cell

Changing your email address

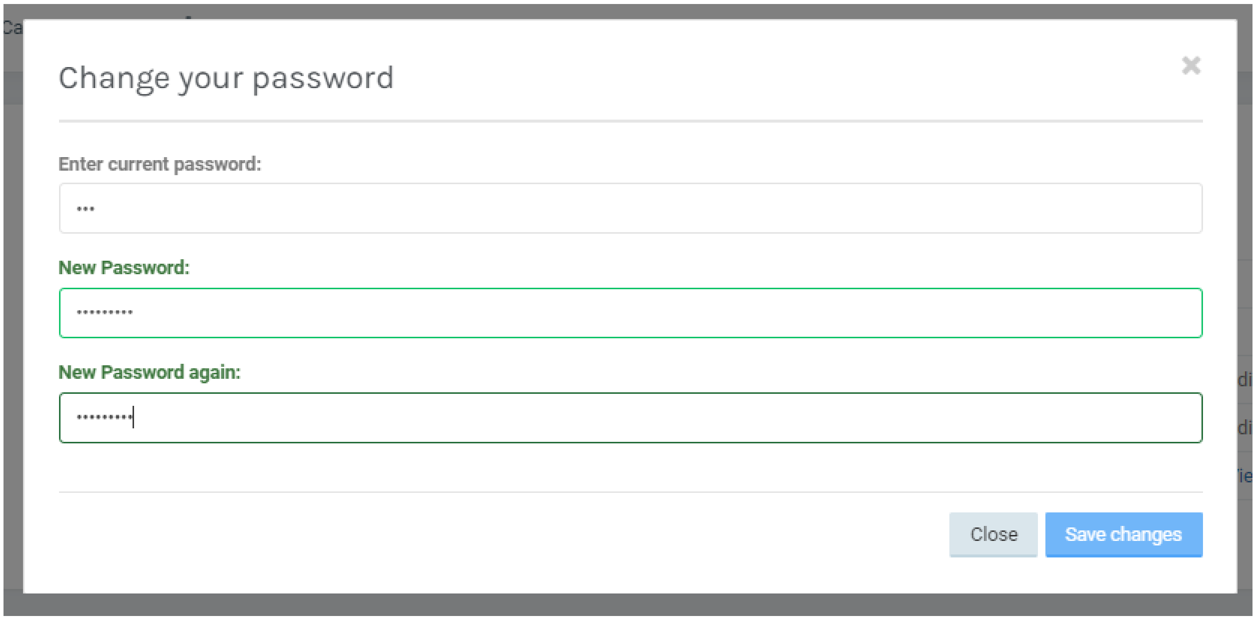
A working email address is necessary for using Administry: your password other important communication are sent via email, and your email address is displayed to other caseworkers who may need to reach you. Any time your email address changes, be sure to update it here.

- A valid email is required (must contain @, etc)
- Enable notifications if you are willing to receive updates about clients, or notifications about required actions (administrators only)
- Click 'Save Changes' to save

Administry Terms of Use

This line indicates the date you last viewed the Administry Terms of Use. All users are required to accept the terms of use before using Adminsitry. Click 'View' to review the Administry Terms of Use.

Changing your password



Passwords are automatically generated by Administry and emailed to you. Look for an email from Administry that contains your username, password and your agency ID. (Note that this email sometimes get sent to spam folders or Gmail's Promotions tab.)

When you log in the first time, change your password to something that will be easier to remember:

- You must enter your current password correctly in order to change your password.
- Passwords must be at least 8 characters and are case-sensitive.
- Type your new password carefully in the New Password box, then enter it again in the New Password Again box.
- Click Save Changes when you're finished.

Note: Administrators CANNOT see or set your password. They can only reset your password by sending a new password to your email.

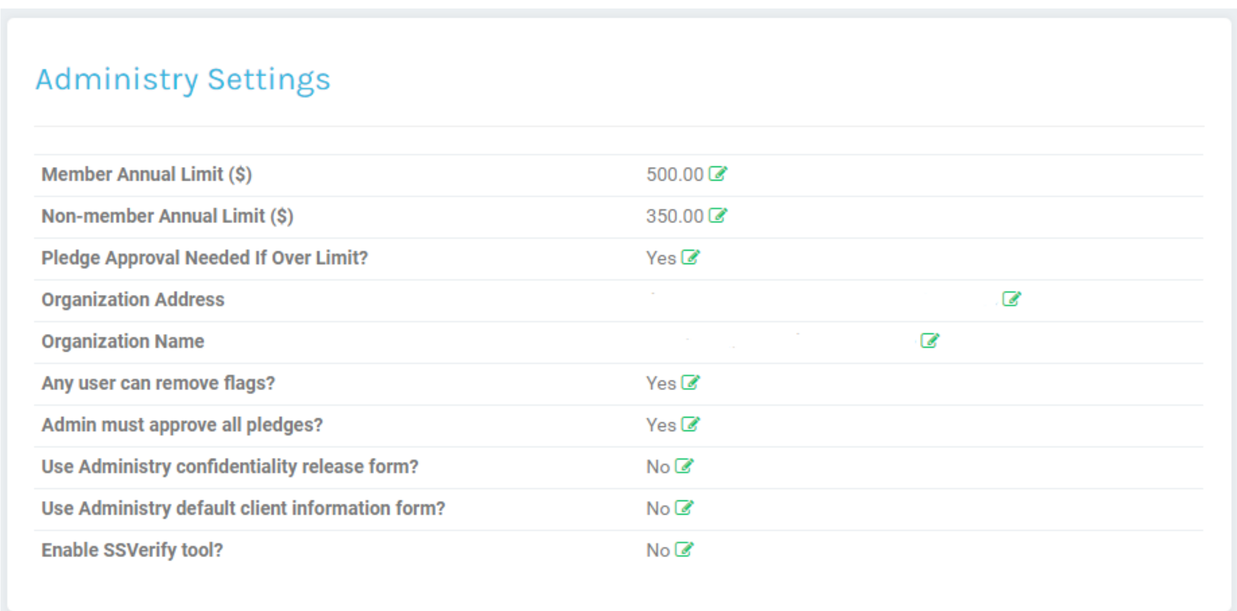
CHAPTER FOUR

ADMINISTRATOR TOOLS

Users with administrator rights have access to a variety of tools and settings to customize the application for their agency.

Administry Setup

Access setup by clicking on Setup in the Admin menu. To edit a setting, click on its row and a detail box will open on the right side of the screen. Click save after making edits or click another row to discard changes. More information about individual settings are below:



Member Annual Limit ($) *(Type: Dollar amount. Do not add the dollar sign ($), but decimal point is OK.)* Sets the annual pledge limit for clients marked as members. Many churches and agencies set a higher pledge limit for clients who are actively involved in church or parish life. Individual clients are assigned member or non-member status on their client dashboards. An administrator can approve a pledge over this pledge limit. Pledge limits calculations are based on a rolling calendar - they include all pledges within the past 12 months, and do not reset on January 1st.

Non-member Annual Limit ($) *(Type: Dollar amount. Do not add the dollar sign ($), but decimal point is OK.)* Sets the annual pledge limit for clients marked as non-members. Many churches and agencies set a higher pledge limit for clients who are actively involved in church or parish life. Individual clients are assigned member or non-member status on their client dashboards. An administrator can approve a pledge over this pledge limit. Pledge limits calculations are based on a rolling calendar - they include all pledges within the past 12 months, and do not reset on January 1st.

Pledge Approval Needed If Over Limit? *(Type: Yes/No)* Set this to 'Yes' if an administrator should be required to approve any pledges over the pledge limit.

Organization Address *(Type: Text)* The organization's mailing address. Changing this field will NOT affect the organization's billing details or how the name of the agency appears to other agencies.

Organization Name *(Type: Text)* The organization's name, which appears in multiple places throughout Administry. Changing this field will NOT affect the organization's billing details or how the name of the agency appears to other agencies.

Any user can remove flags? *(Type: Yes/No)* Set this to 'No' if only administrators should be allowed to delete client flags. some flags prevent pledges.

Admin must approve all pledges? *(Type: Yes/No)* Set this to 'Yes' if an administrator should be required to approve all pledges regardless of amount, vendor, or other factors.

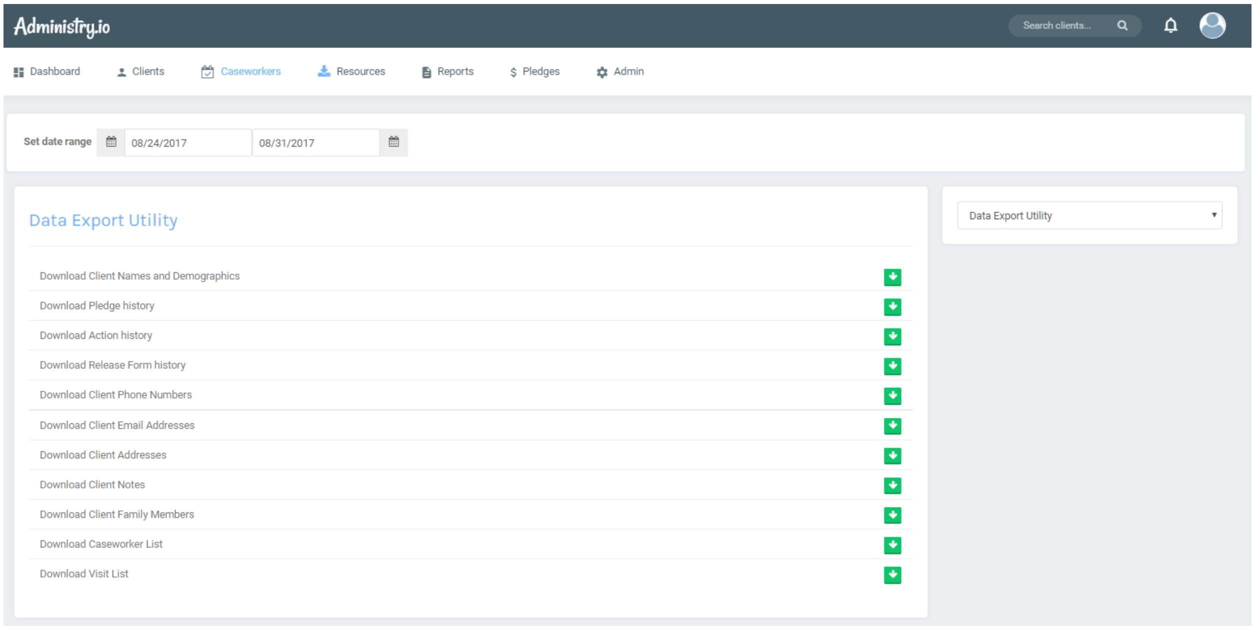
Use Administry confidentiality release form? *(Type: Yes/No)* Set this to 'Yes' to display the Client Confidentiality Form (CCF) in the Resource List. As explained in our Terms of Use document, Administry **strongly recommends** using this form to inform clients of their rights, and to capture their consent.

Use Administry default client information form? *(Type: Yes/No)* Set this to 'Yes' to display the Client Information Form (CIF) in the Resource List. As explained in our Terms of Use document, Administry **strongly recommends** using this form to collect demographic information about clients.

Enable SSVerify tool? *(Type: Yes/No)* Set this to 'Yes' to show the 'SSVerify' option in the Client Dashboard menu. This is a tool to ensure clients are who they say they are. When clients request assistance, caseworkers can use SSVerify to save a securely hashed copy of the client's social security number. Then, caseworkers can verify that clients are using the same social security each time they return for assistance.

Enable Payments module? *(Type: Yes/No)* Set this to 'Yes' to enable the Payments module in Administry. Only Data Managers and Admin will be able to view and add/edit payment data for pledges.

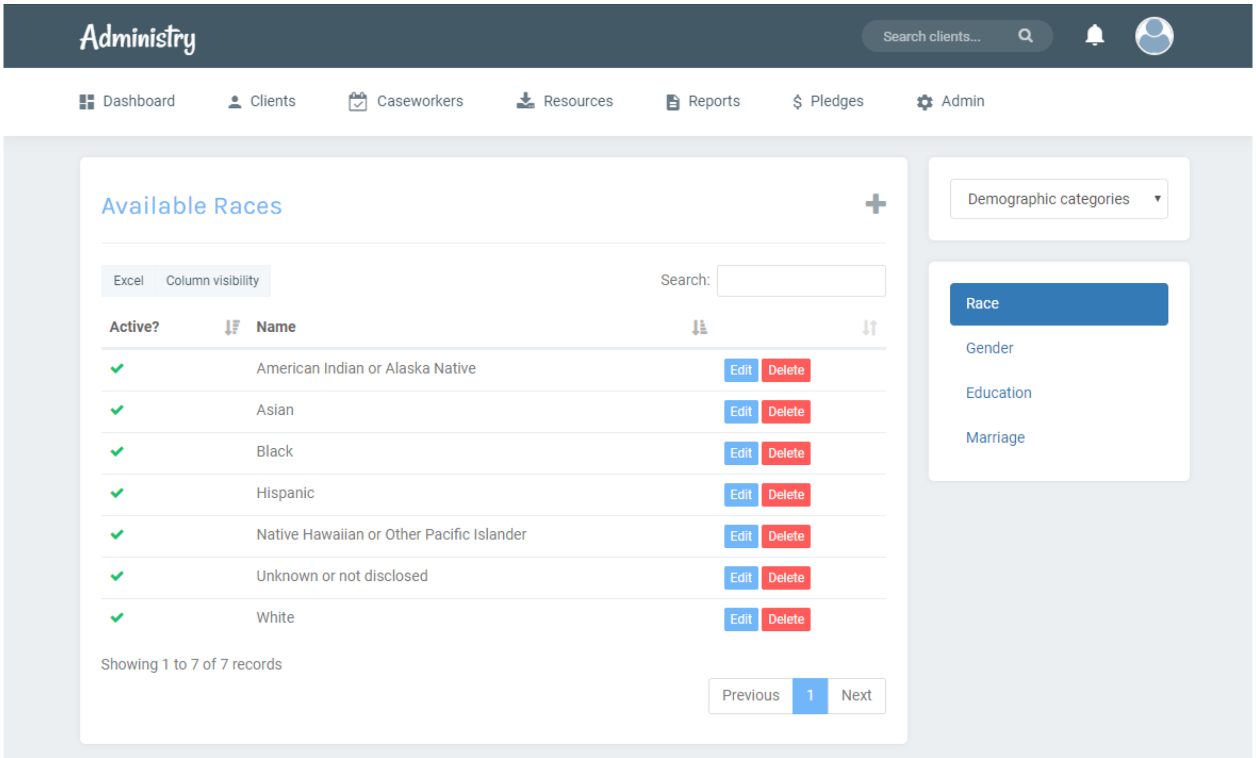
Data Export Utility



Agency administrators may choose to periodically export their agency data with the Data Export Utility. To launch the tool:

1. Click on Settings under the Admin menu.
2. Once the Settings page loads, click on the Settings dropdown menu on the top righthand corner of the screen. Select Data Export Utility.
3. Once the Data Export Utility loads, use the date filter at the top of the screen to limit the data export. (Note: some exports are not date-driven.)
4. For each type of data, click on the green download button. A download should begin momentarily.
5. Depending on your browser, you should see a Save As dialogue box, or you should see the file at the bottom of your screen. You can also check your browser's Download tab (Ctrl+J in Chrome, Firefox, and Internet Explorer) to view recent downloads.
6. Files are downloaded in CSV format, and should open with Microsoft Excel.

Demographics Setup



Administry tracks several demographic categories such as race, gender, highest education level and marital status. Several default categories are loaded automatically, but you can add and edit categories as necessary.

To add or edit demographic categories:

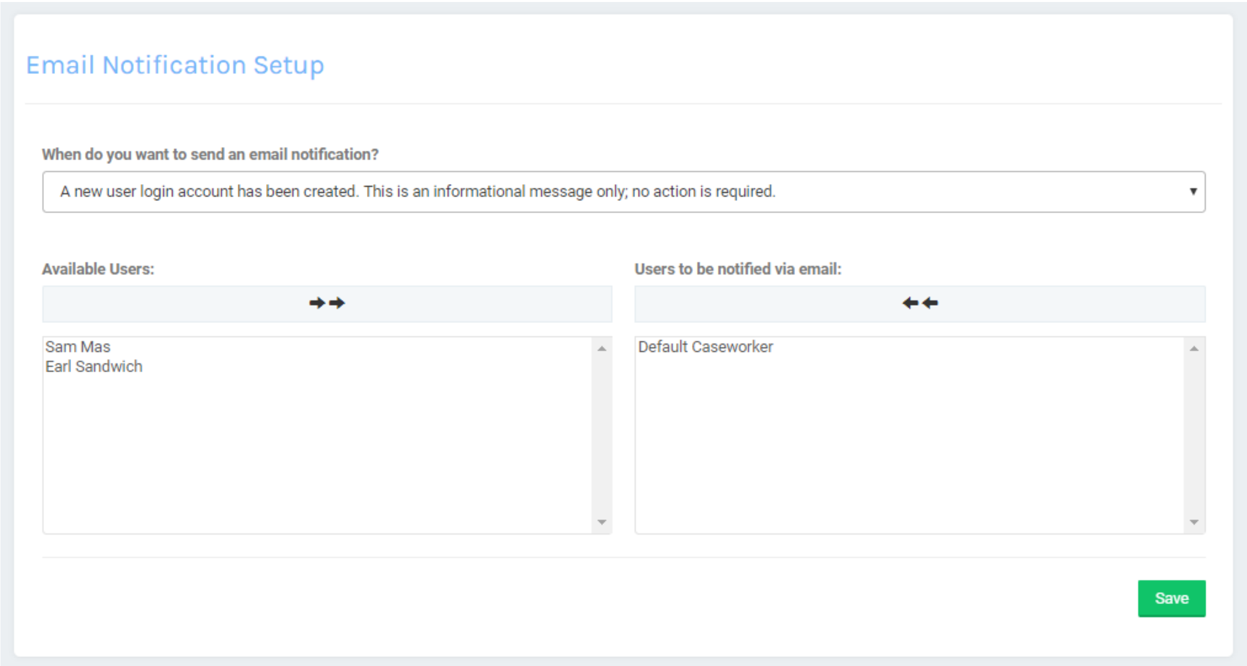
1. Under the Admin menu, select Administry Settings.
2. Once the Settings page loads, click on the Settings dropdown menu on the top righthand corner of the screen. Select Demographic Categories.
3. Choose a demographic category from the tabs on the right side of the screen. A list of active categories are displayed below.
4. Edit an existing option by clicking Edit, or delete an option by clicking Delete.

Note: Deleting demographic entries will also delete corresponding demographic information associated with clients. For instance, deleting a marital status will result in any clients with that status being set to null.

Email Notifications

Adminsitry can notify you via email when certain events take place in Administry. For instance, Administry can alert you via email whenever a pledge requires approval or whenever a new client is added.

Note: Only Administrator or Data Manager users may receive email notifications from Administry.



To set up email notifications:

1. Under the Admin menu, select Administry Settings.
2. Once the Settings page loads, click on the Settings dropdown menu on the top righthand corner of the screen. Select Change Email Notification Settings.
3. Choose an event from the dropdown list. This will load two list boxes.
4. Choose users from the first list to receive email notifications for the selected event by clicking on the user's name. This will move the user to the second list.
5. Add as many users as desired; all users will receive an email alert whenever the selected event takes place.
6. Click the double arrow at the top of the list to move all names between lists.
7. Click Save

Note: Users may disable email notifications in their user profile.

CHAPTER

FIVE

CONFIGURING USERS

Everyone who uses Administry must use their own account login. **Never share login info, or allow another user to use your account.**

Note: Accounts that are inactive for 60 days will be automatically deactivated. Administrators may reactivate these accounts.

Adding Users

1. After your agency signs up for Administry, your designated billing contact will receive an administrator username, password and an agency identification number. Visit *secure.administry.io* to login with this info.
2. Once logged in, look under the Admin menu, and select User Setup.
3. At the top of the Registered Users list, click on the plus sign to add a new user.
4. Once the New User window loads, enter the user's name, phone number, email, gender, and username. The username must be unique for every user - we recommend something like `johndoe` for a username (first and last name). Also, type the email address very carefully because Administry will use this email to send a password to the new user.
5. Select a user type. Your options are:

Administrator these users have full access to all of your organization's data, including the ability to add, edit and delete anything. At most, your organization should only have 2 or 3 administrator accounts.

Data Manager these users can change almost all of your organization's data, but they cannot change settings, users, or ledger accounts. These users can see and edit data about specific clients.

Caseworker these users can add and edit client information, make pledges, and access most of the information your agency stores in Administry. They cannot change settings or add users, and they cannot add services. Most of your user accounts should be set to this user type.

Read Only these users can view specific client information but cannot make changes. This type of account is good for pastors, supervisors, or board members who aren't actively working as caseworkers.

Reporting Access these users cannot see any specific client information, but may view aggregate reports about your agency's work, including total pledges, and the pledge map.

Resource Only these users only have access to resources under the Resources tab.

6. Click "Save and Close". You should now see the new user in the Registered Users list. Administry automatically sends an email to your new user with instructions on how to log in. This email also contains your agency code and their new password.

7. Repeat steps 3-6 for each of the users you want to add to Administry.

User Permissions

Access	Administrator	Data Manager	Caseworker	Read Only	Reporting Access	Resource Only
View/Download Resources	Yes	Yes	Yes	Yes	Yes	Yes
View Reports (summary only)	Yes	Yes	Yes	Yes	Yes	
View specific client info	Yes	Yes	Yes	Yes		
Assign Tasks	Yes	Yes	Yes	Yes		
Edit/addclients	Yes	Yes	Yes			
Edit/add/delete services	Yes	Yes				
Edit/add/delete funds	Yes	Yes				
Record Fund Transactions	Yes	Yes				
Delete/Merge Clients	Yes					
Approve/Print Pledges	Yes					
Record/Edit Payments	Yes					
Change Administry settings	Yes					
Add/edit users	Yes					

Editing Users

1. Under the Admin menu, select User Setup.
2. Find the user you want to edit in the Registered Users list. Highlight the user's row by clicking on it.
3. Look for the User Detail box displaying information about the user on the right side of the screen. Click on "Edit User Info".
4. Make your changes. **Note:** changing the username or account type will impact the user's ability to log into Administry, and may impact the level of access that user will have to your agency's data. Make changes carefully.
5. Click Save and Close when you're finished.

Resetting Passwords

For security purposes, passwords cannot be viewed or recovered in Administry. If a user forgets his or her password, an administrator must reset the user's password and Administry will automatically email the new password to the user. To reset a user's password:

1. Under the Admin menu, select User Setup.
2. Find the user in the Registered Users list. Click on the user who needs a password reset.
3. Look for the User Detail box displays information about the user on the right side of the screen. Click on the "Reset Password" button.
4. Administry automatically generates a new password and emails it to the user. (Make sure the user's email address is correct!)

Deactivating a User

Warning: Deactivated users will not be able to log into Administry! Only deactivate users who do not need to access Administry.

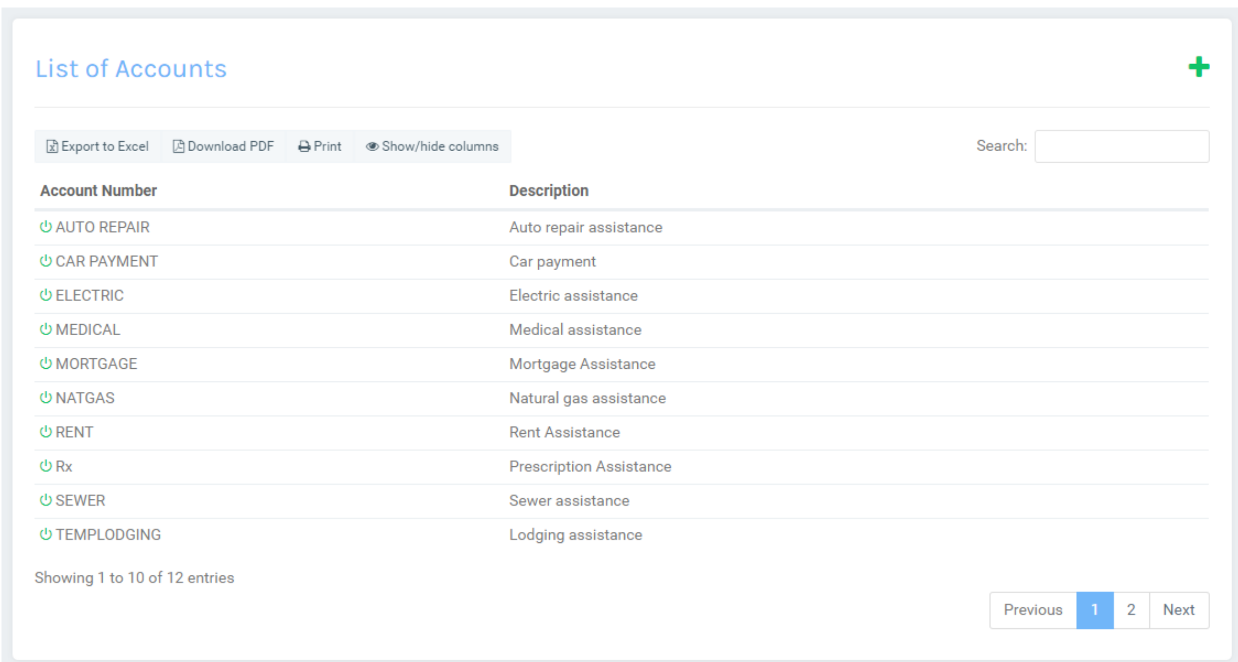
1. Under the Admin menu, select User Setup.
2. Find the user in the Registered Users list. Click on the user who needs to be deactivated.
3. Look for the User Detail box displaying information about the user on the right side of the screen. Click on "Edit User Info".
4. Once the user details form loads, toggle the "Active?" switch and then click "Save and Close".
5. To reactivate a user, toggle the "Active?" switch again.

CHAPTER

SIX

FUND SETUP

Funds help you track your vendors by category. Funds can help you compare money spent on rent versus money spent on utility bills, for instance. Administry comes preloaded with several fund categories, and you can add or deactivate funds at any time. It is a good idea, however, to set them up before recording pledges.



List of Accounts

Export to Excel | Download PDF | Print | Show/hide columns

Search:

Account Number	Description
AUTO REPAIR	Auto repair assistance
CAR PAYMENT	Car payment
ELECTRIC	Electric assistance
MEDICAL	Medical assistance
MORTGAGE	Mortgage Assistance
NATGAS	Natural gas assistance
RENT	Rent Assistance
Rx	Prescription Assistance
SEWER	Sewer assistance
TEMPLODGING	Lodging assistance

Showing 1 to 10 of 12 entries

Previous 1 2 Next

Working with Funds

The Funds screen gives you a list of active and inactive funds, fund balance information, and more. To view the Funds screen, Administrators can select Funds under the Admin Menu. To edit a Fund Name or description, click on the row, and the fund's details panel will appear on the right side of the screen. Click on Edit to make changes.

Note: The fund balance column shows the actual current fund balance. To view fund balances on a particular day, click on View transactions

View Fund Transactions

In Administry, a Fund Transaction is any financial debit or credit not attached to a pledge. (Transactions that are attached to pledges are called *payments*).

View Fund Transactions by clicking on Funds under the Admin menu. Then click on View Transactions for the fund you wish to view. This screen will display a combined list of all Fund Transactions as well as Payments (if the payment module is enabled) or Pledges (if the Payment module is not enabled).

1. Once the page loads, set the date range at the top of the screen. Note that the end date will be used to calculate the fund balance that displays on the right side of the screen. (The start date is NOT used to calculate this figure.)
2. Switch between funds with the dropdown next to the date range inputs.
3. Fund Transactions and payments appear in the list. Fund Transactions and payments may be edited by clicking on the edit button for each row. Pledges cannot be edited.
4. New fund transactions may be added by clicking the plus sign at the top of the Fund Transaction List. They may be recorded as debits (subtracted from the fund balance) or credits (added to the fund balance). Debits are shown in red, while credits are shown in green.

Add a Fund

1. Under the Admin menu, select Funds to add new funds.
2. At the top of the List of Funds list, click on the plus sign to add a new fund.
3. Once the New Fund window loads, fill in the required information:

- **Fund Name** - this field is used to identify the fund and should be unique. Often this is a number that ties to an external accounting ledger kept by your agency or church.
- **Fund Description** - this field is used to explain what the fund is used for. For example, this could be “Utility assistance” to help other users know that this fund tracks pledges made to utility companies.
- **Active?** - this field determines whether or not this fund can be tied to new vendors and pledges. Setting this to “off” will not delete transactions made against this fund.

4. Click Save and Close. Your new fund should appear in the List of Funds.

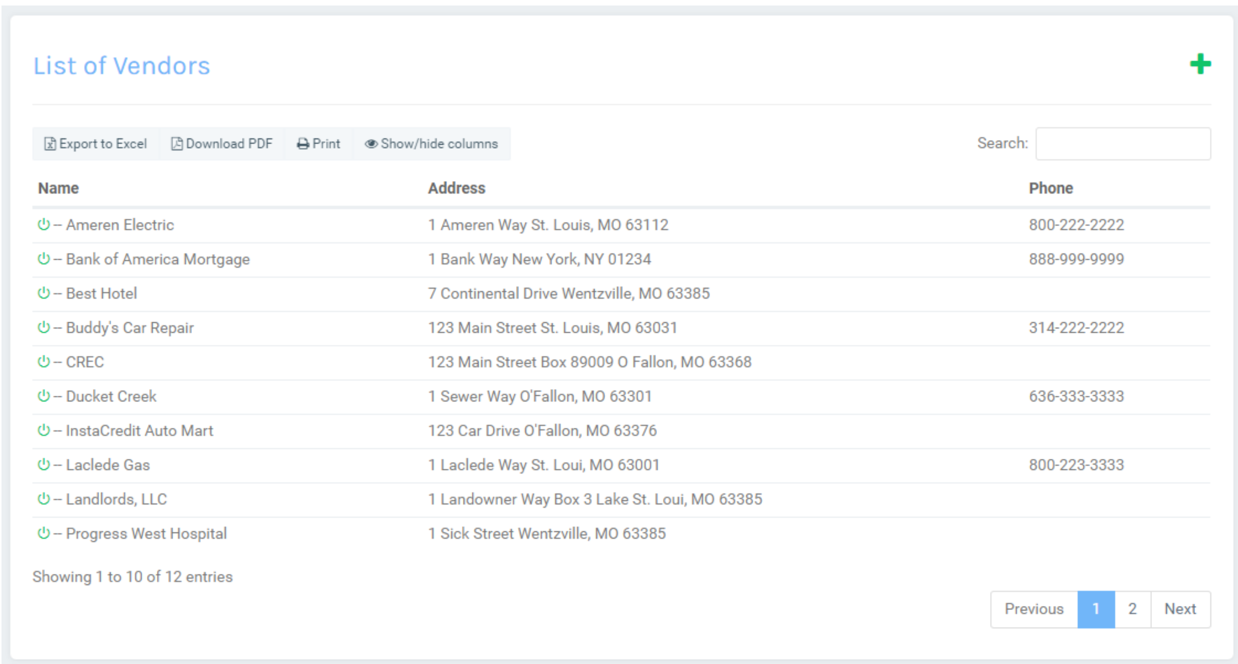
Every **vendor** must be assigned to a fund. See instruction for *adding new vendors*.

CHAPTER

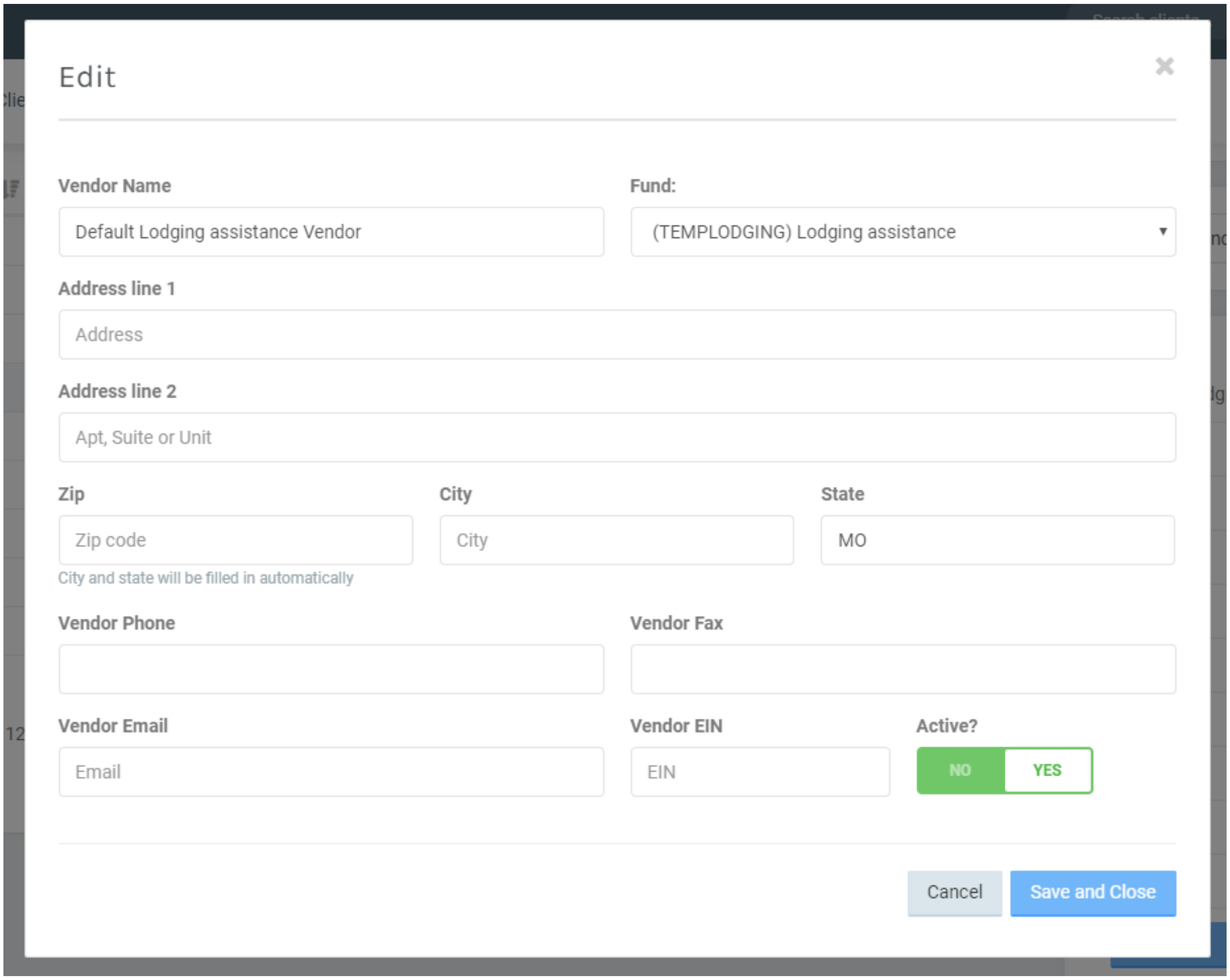
SEVEN

VENDORS

A **vendor** is any business your organization sends money to on behalf of a client. Utility companies, landlords, insurance companies, auto repair shops and doctor offices are the most common types of vendors.



Add a Vendor



1. Under the Admin menu, select Vendors.
2. At the top of the List of Vendors, click on the plus sign to add a new vendor.
3. Once the New Vendor window loads, fill in the required information. Ensure the mailing address is accurate. This information will print on the check request form, and will be the address your financial secretary uses to send payment. Also be sure to select the appropriate fund for the vendor. New funds can be *added in the Funds Setup section*.
4. Click Save and Close.

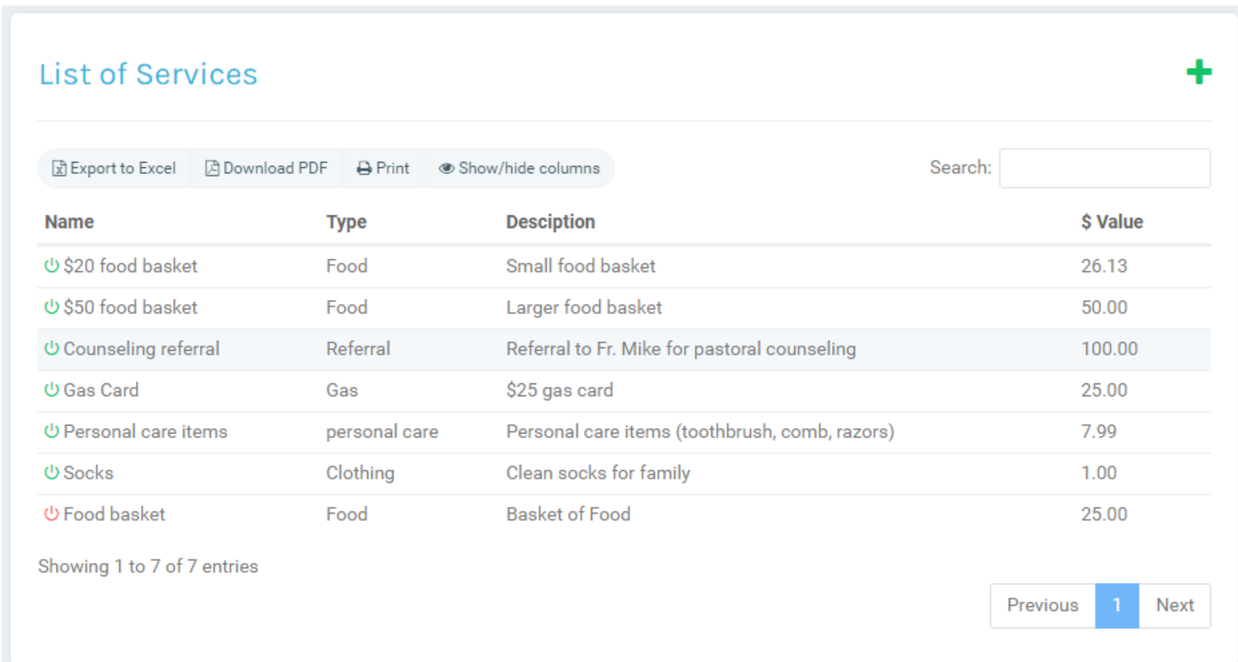
New Vendors may also be added while recording a pledge. Any caseworker can add a new vendor, but an administrator must approve pledges made to a new vendor.

CHAPTER

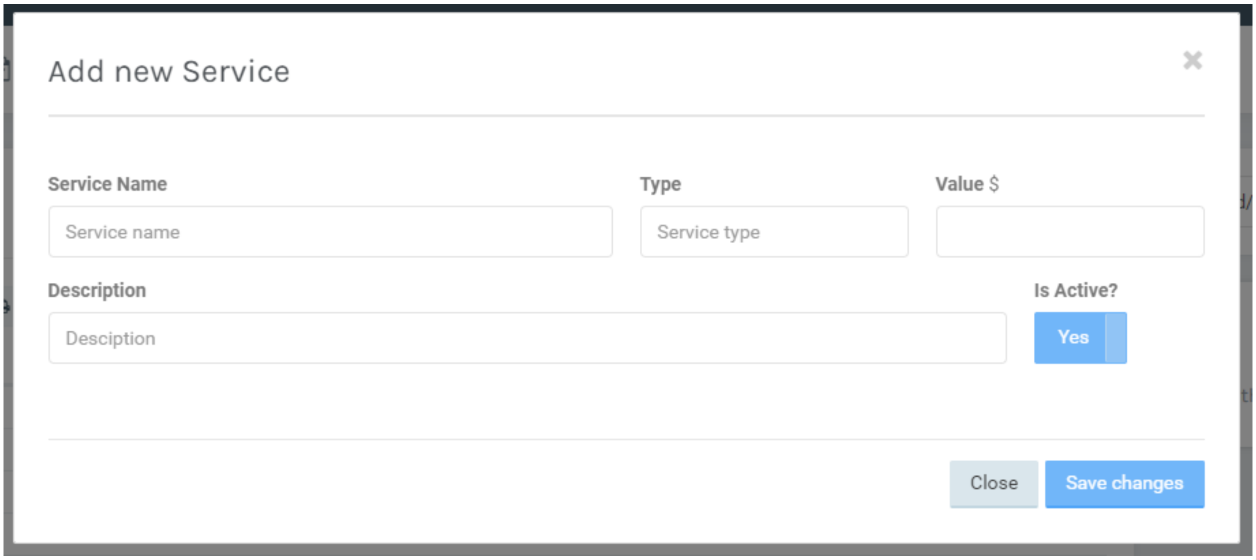
EIGHT

SERVICES

A **service** is any type of non-financial assistance given to a client in the form of an *Action*. A Service is a type of Action in the same way a Vendor is a type of Pledge.



Add a Service



1. Under the Admin menu, select Services.
2. At the top of the List of Services, click on the green plus sign to add a new vendor.
3. Once the New Vendor window loads, fill in as much information as possible:

- **Service Name**: The name of the service that displays in Administry reports and on the Client Dashboard.
- **Service Type**: A general category of service. Possible values include 'referral', 'in-kind', 'food', etc.
- **Value $**: The approximate value of the goods or services. For instance, if your agency typically gives out gas cards in $20 increments, assign a value of $20, or if a thrift store voucher typically costs your agency $50, enter $50 here. Some agencies define multiple sizes of food baskets, for instance, and assign different values to each.
- **Description**: A short description of the service.

4. Click Save and Close.

Note: Only administrators can create new services or edit existing services.

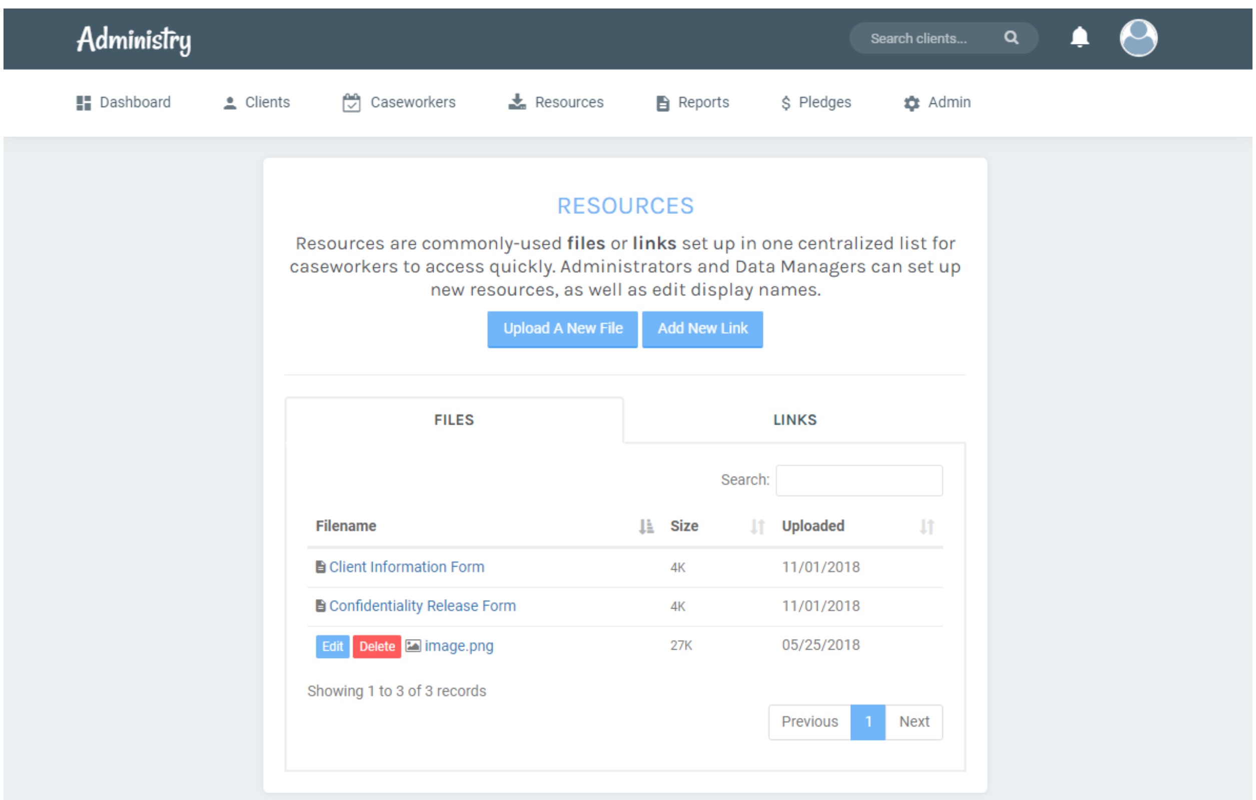
CHAPTER

NINE

RESOURCES

Administry allows your organization to upload documents, pictures, spreadsheets and other files for your caseworkers. This is a great way to ensure everyone has access to resource lists, organizational policies, intake forms, and other documents. These resources are accessible to all of your users, regardless of access level.

Add a Resource



1. Log in as an administrator and click on Resources.

2. On the right hand of the screen, click on the box with the text “To upload new resources, or drag and drop your files here”. After the file selection dialogue box opens, select the file to upload. You can also drag a file from your computer and drop it into this box.
3. If the file upload is successful, it should appear in the list of Downloadable Resources
4. To change the name of the file, click on the green edit button. **Use descriptive file names so your users can find what they need!**
5. To delete the file, click on the red X. **Caution:** You cannot undo a file deletion!

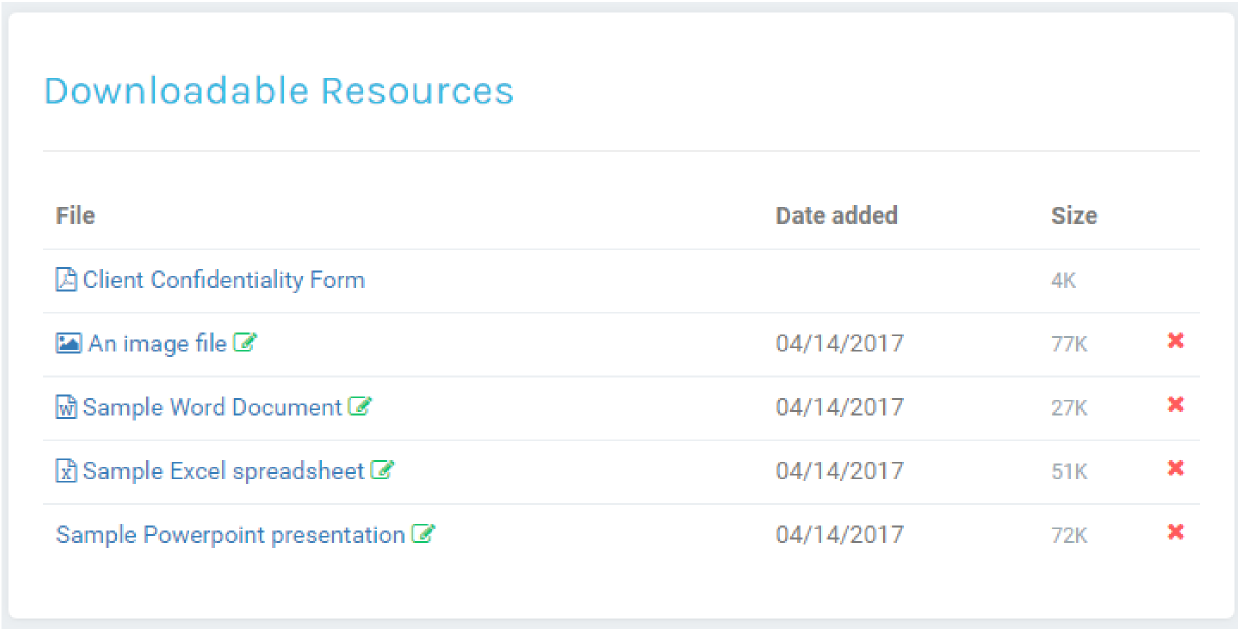
Note: Only Administrators can add, edit, and delete resources.

Allowable File Types

Administry only allows certain types of files to be uploaded. Make sure the file extension matches the type of file you upload!

Extension	File Type
.pdf	PDF document
.jpg or .jpeg	JPEG image
.png	PNG image
.doc or .docx	Microsoft Word document
.xls or .xlsx	Microsoft Excel spreadsheet
.txt	Plain Text document
.rtf	Rich-text document

Download a Resource



1. Click on Resources.
2. In the list of Downloadable Resources, click on the name of the file. Download should begin immediately. Depending on your browser, you should see a Save As dialogue box, or you should see the file at the bottom of your screen. You can also check your browser's Download tab (Ctrl+J in Chrome, Firefox, and Internet Explorer) to view recent downloads.

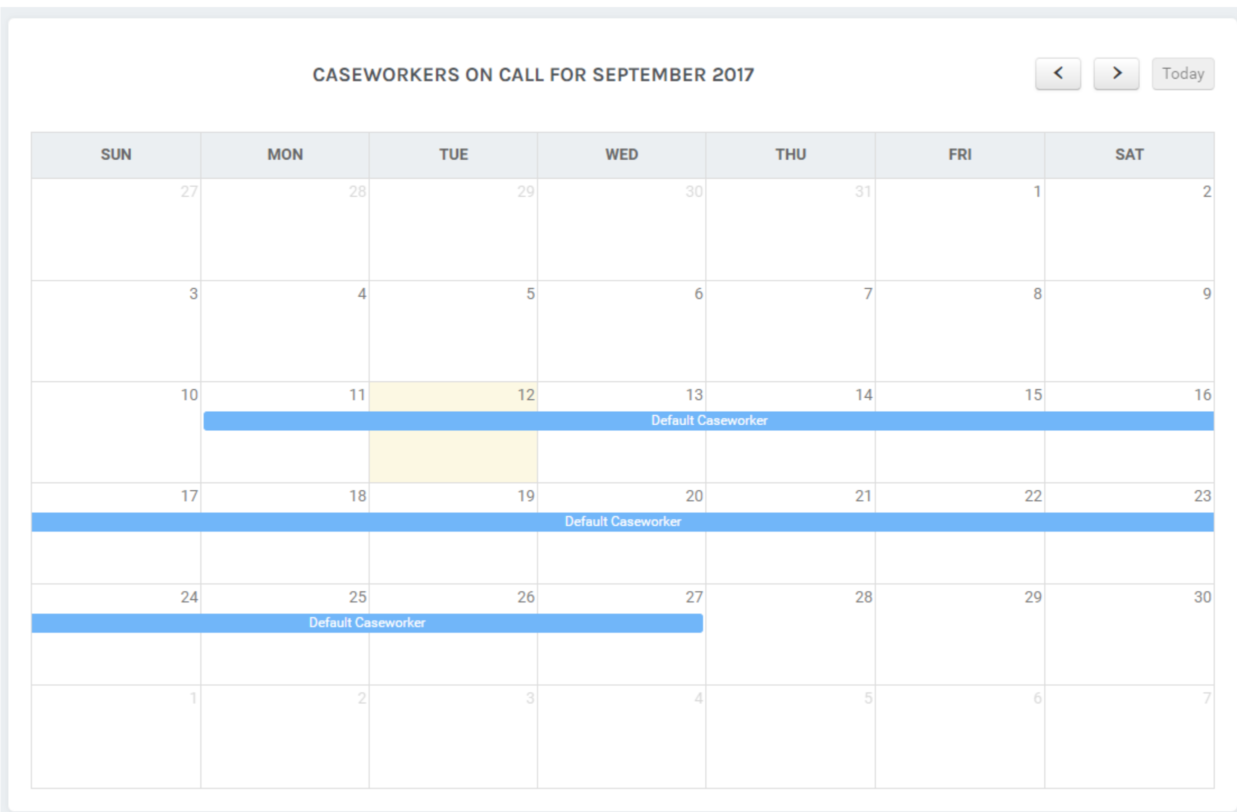
- This list also appears on each user's homepage.

CHAPTER TEN

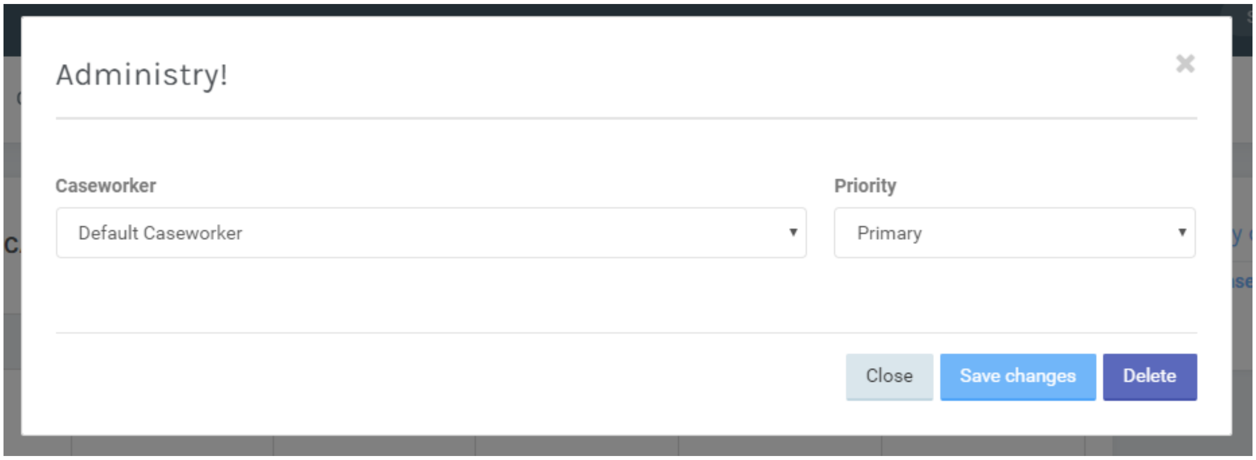
CASEWORKERS

On call Caseworkers

Administry allows agencies to schedule caseworkers who are on call throughout the week. The caseworkers currently on call are displayed on the Dashboard, and are viewable on the On call Calendar.



View the Calendar and edit caseworkers on call by clicking on the On Call option under the Caseworkers menu



1. To Add an on call caseworker, click on a day on the calendar.
2. When the dialogue box opens, select the caseworker, and the select the priority (options are Primary and Backup)
3. Click Save to save or cancel to cancel.
4. To delete an on call assignment, click on it on the calendar. Then click on the Delete button in the dialogue box.
5. To extend an on call assignment over multiple days, drag the right edge of the assignment on the calendar to the desired ending day. Assignments can also be dragged to new days.

Caseworker Directory

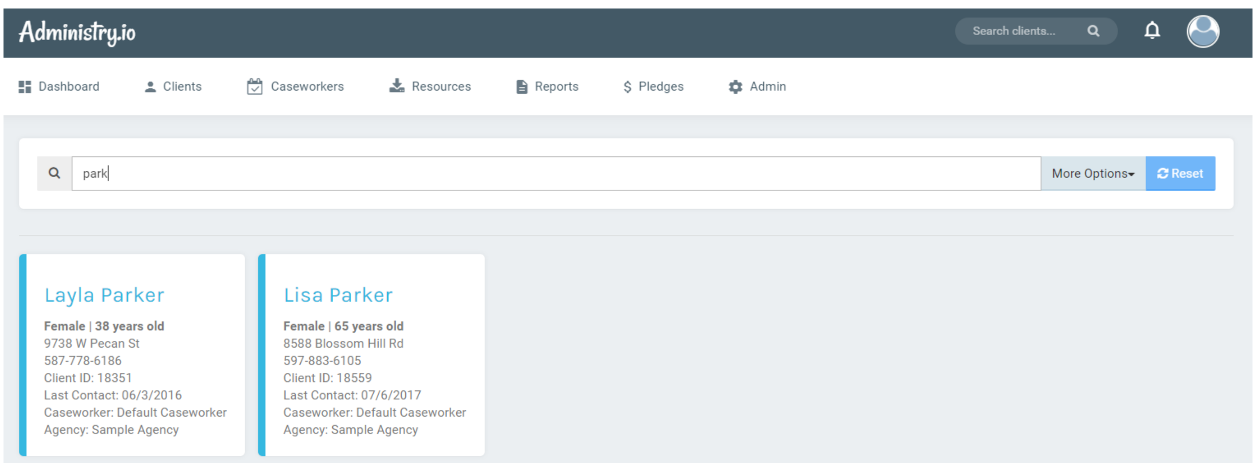
The Caseworker menu also includes a Caseworker Directory, which provides an accessible reference for caseworkers to easily contact one another. Resource-Only users may not access the Caseworker directory.

CHAPTER ELEVEN

SEARCHING FOR CLIENTS

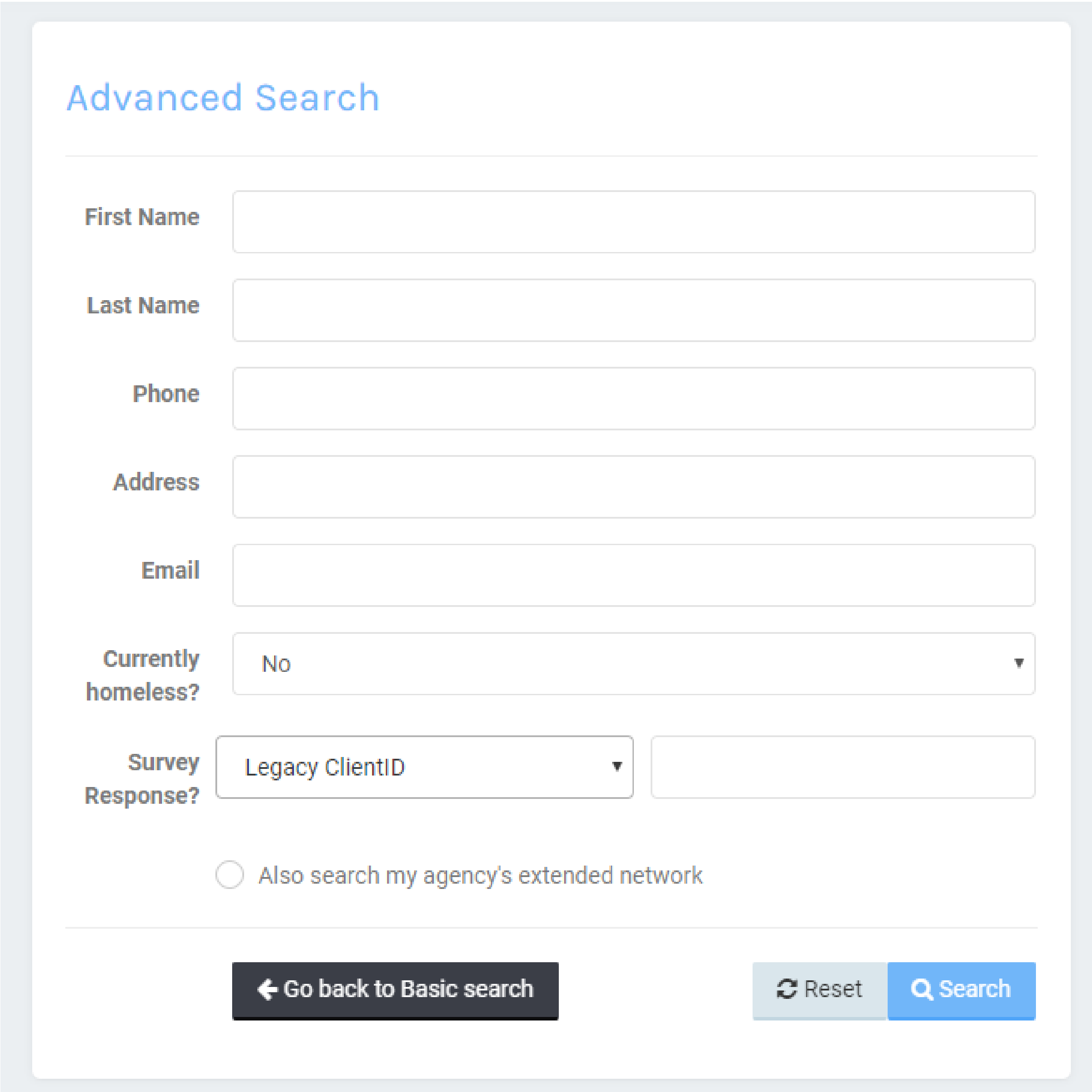
As a caseworker, a phone call from a client can raise lots of questions. Who is this client? Have we helped this person before? When was the last time I spoke to this client? Has this client spoken to another caseworker? How much can we afford to pledge toward this client? Administry puts the answers to these questions at your fingertips!

Search for a client by name or client ID



1. From any screen in Administry, type the client's name or client ID in the top search bar, and click the magnifying glass to search.
2. Alternatively, click on Search under the Clients menu. Type in the client's name in the search box.
3. Search results display the client name, client ID and other information to help you identify the correct client. To view more about a client, click on the client's name.

Advanced Search



From the Basic Search screen click on 'Advanced Search' to search by first or last name, email, phone number or address.

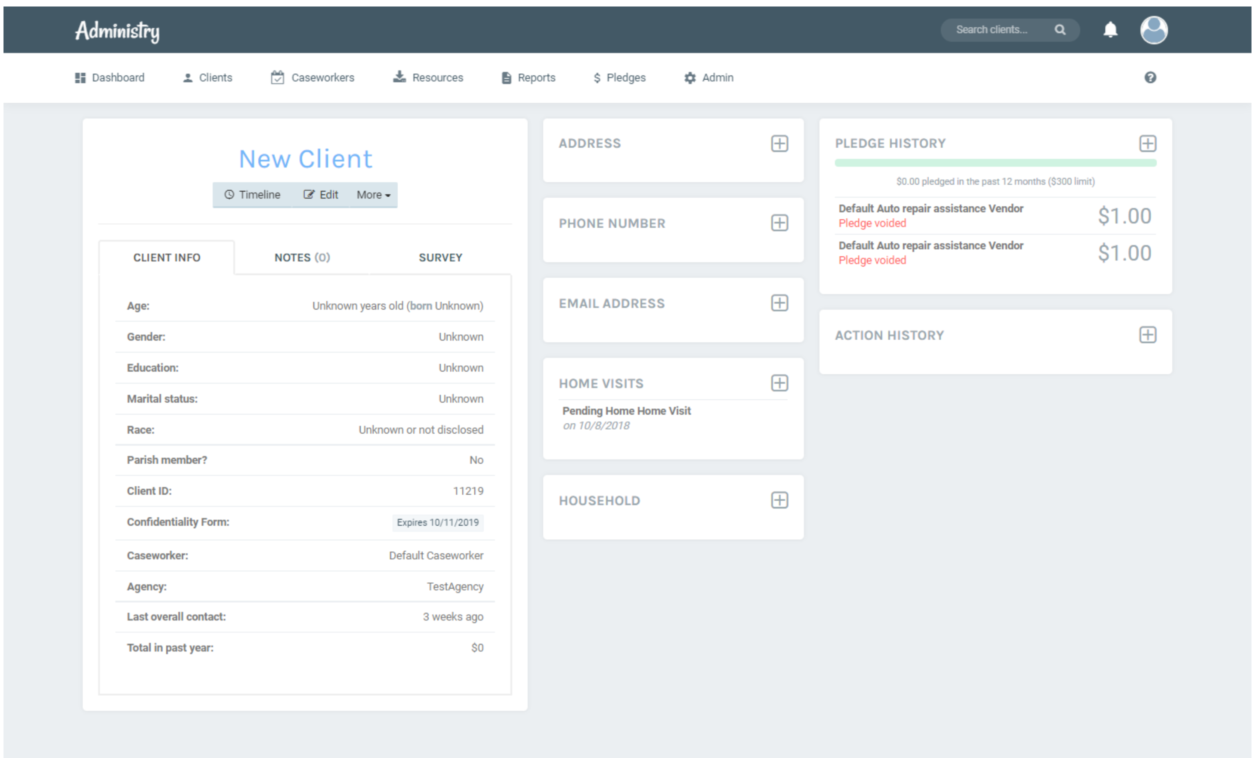
Survey Question: Custom client fields in Administry are called Survey Questions. You can use the Advanced search to local specific responses to survey questions. First select the question, then type in the response you're looking for. *If you need more comprehensive reporting on survey questions, please contact support to create a custom report.*

Also search my agency's extended network: This setting (selected by default) also searches agencies who share data with your agency. Search results from other agencies will show in a different color.

CHAPTER

TWELVE

VIEWING CLIENTS



Client Dashboard

The Client dashboard is one of the most powerful features of Administry. It shows you an overview of a client's entire history with your organization.

Load a client *by searching for a client*. The following information is displayed:

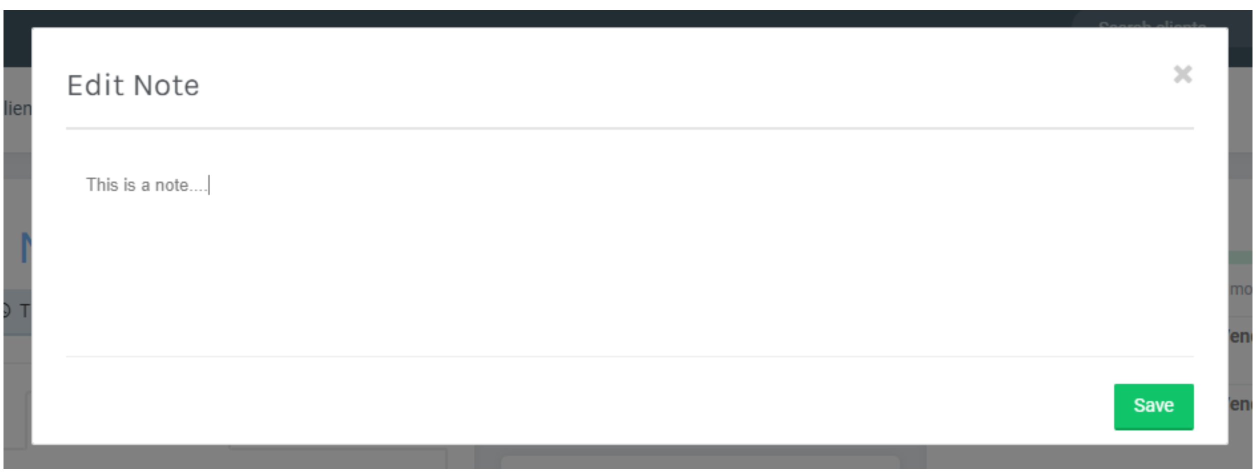
Client Name: Displays the full name of the current client

More Actions Shows more options for this client:

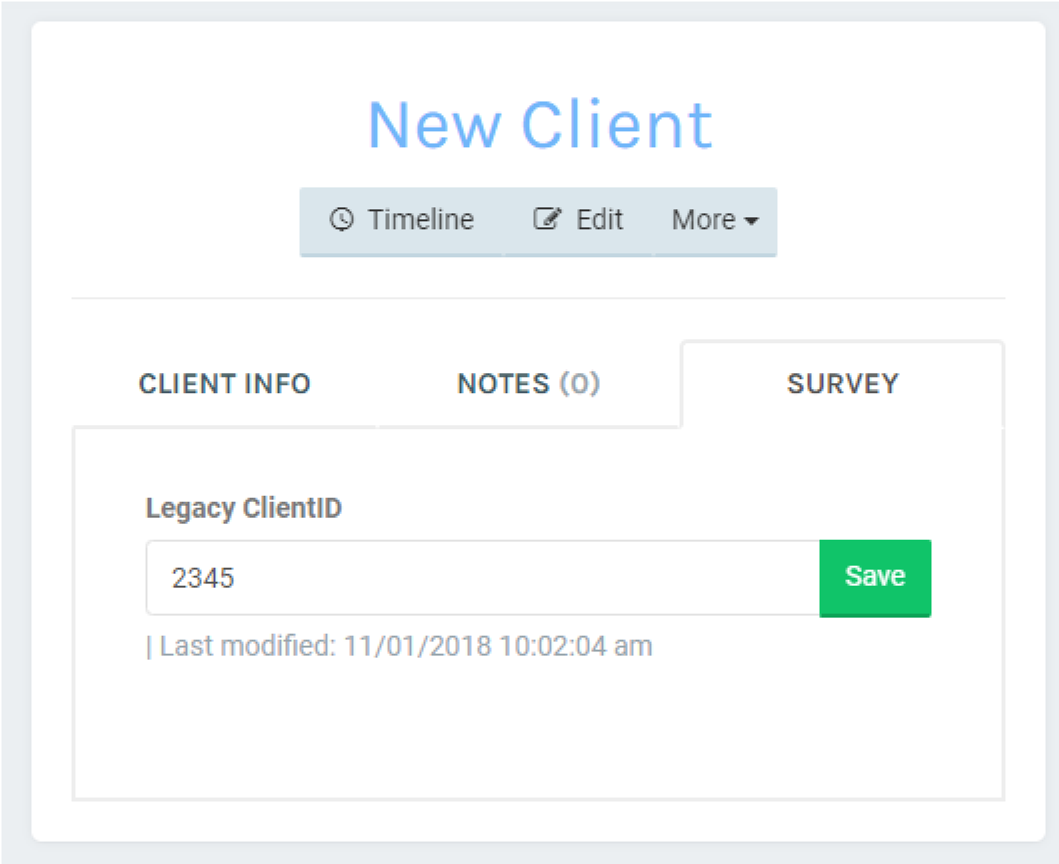
- **Assign a Follow-up Task:** This tool allows you to assign simple client tasks to other caseworkers.
- **Documents:** Launches the *Client Documents* tool
- **Add a note:** Creates a new *note* for this client
- **Add a Flag:** Add *client flags*
- **Print Client Info:** Displays client information in a printer-friendly format
- **SSVerify:** Launches the *SSVerify* tool
- **Merge Another Client:** (Administrators and Data Managers only) Merges another client profile into this client
- **Permanently Delete Client:** (Administrators only) Delete client, including all associated information
- **Search for another client:** Opens the search screen

Demographic information: This section displays demographic information about the client. This information can be changed by clicking on the More Actions dropdown

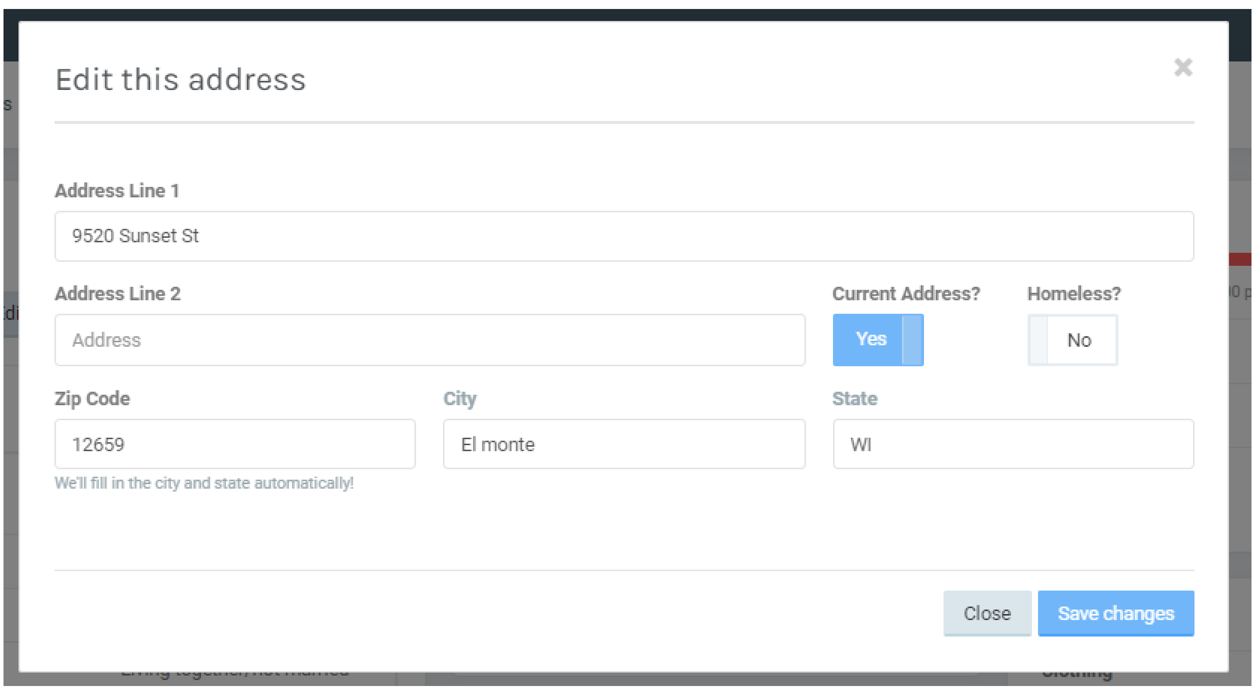
Notes: Summaries of all *client notes* are listed here. The full note can be viewed by clicking on the summary. Caseworkers can read all notes on a client, and can edit their own notes. Administrators can edit any note.



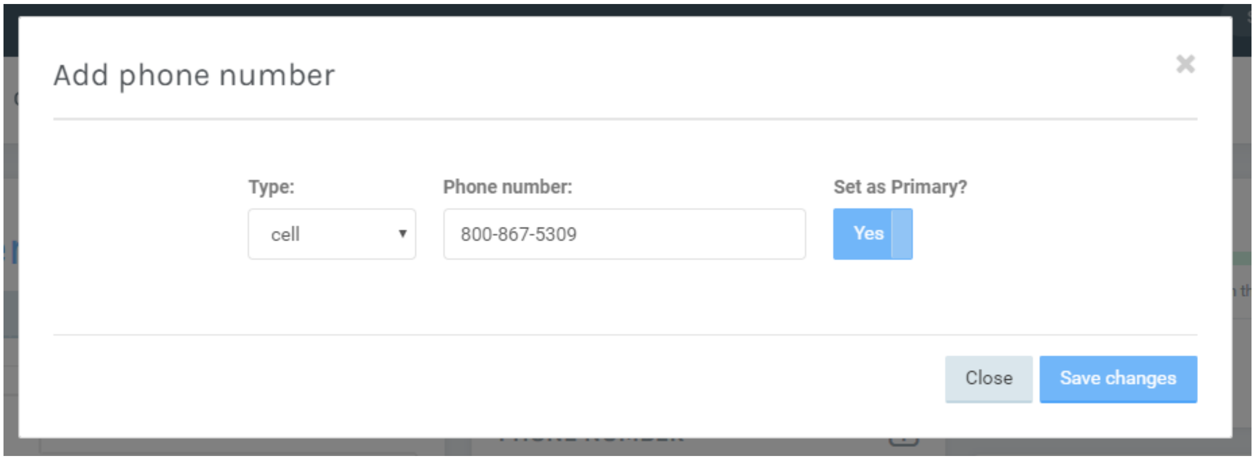
Survey: Custom fields in Administry are called Survey Questions. Administrators may create new survey questions; all currently-active questions appear here for each client. To save a new response, simply make your changes and click 'Save'. *Note: Adding a new response will overwrite any previous response.* The Last Modified date field for each question will also be updated when adding a new response. You can search for specific survey question responses from the *Advanced Search Page*, or request a custom report for other data related to survey questions.



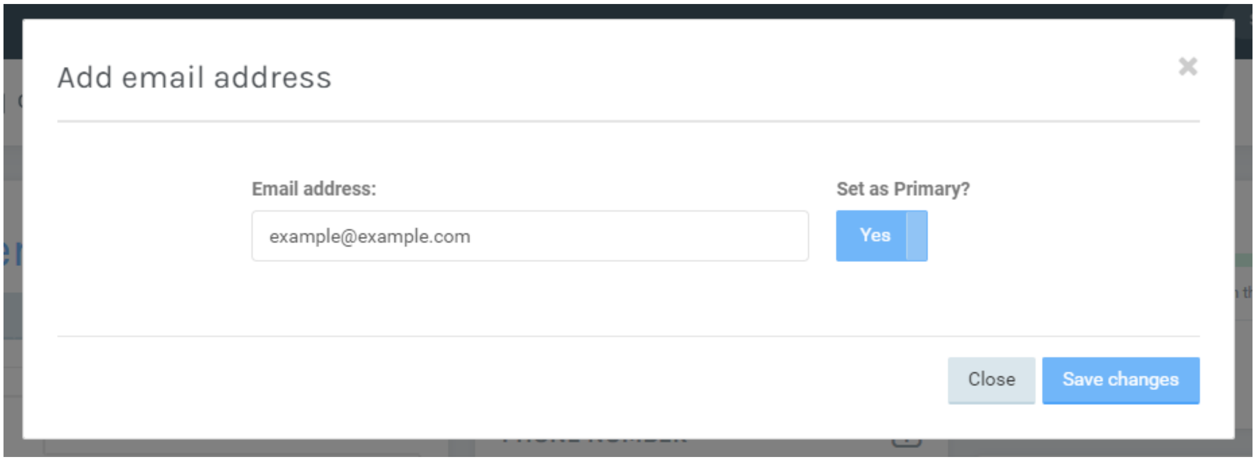
Address: Displays the primary address for the client. The primary address is in bold. Click on an address to edit or delete. Add a new address by clicking on the menu icon at the top of this box.



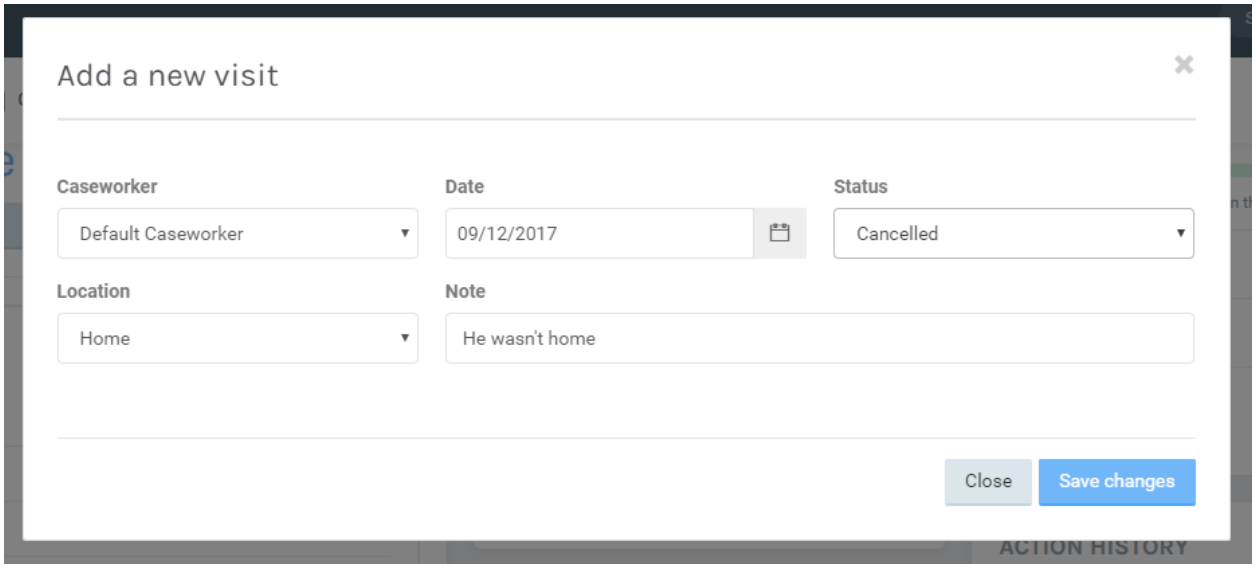
Phone Number: Displays phone numbers for the client. The primary phone number is in bold. Click on a phone number to edit or delete. Add a new phone number by clicking on the menu icon at the top of this box. When adding or editing addresses, Administry will automatically fill in the city and state based on the zip code (you can edit the city and state if necessary).



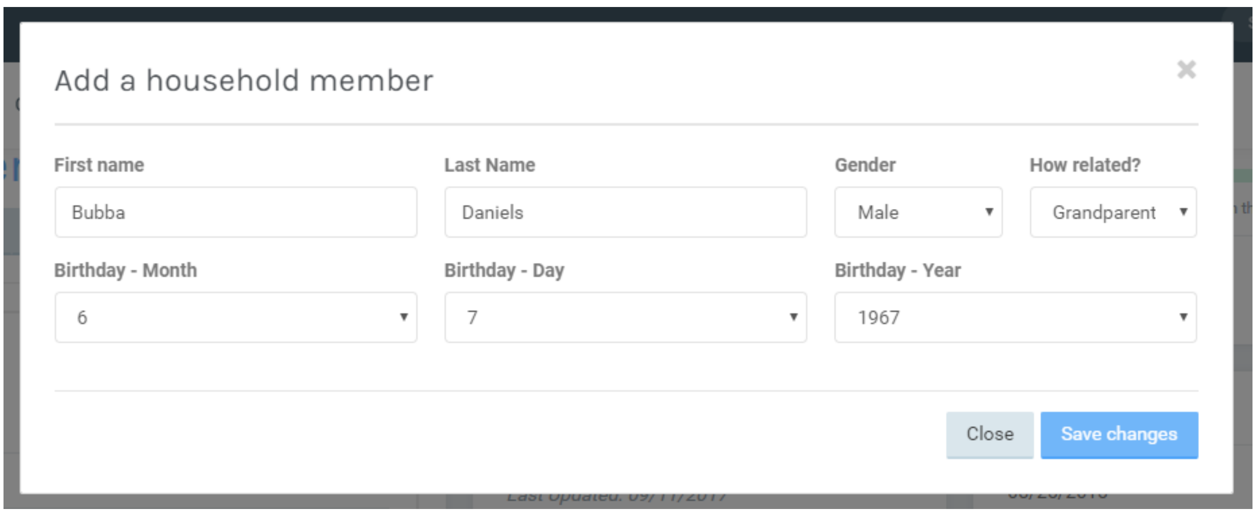
Email Address: Displays the primary email address for the client. The primary email address is in bold. Click on an email address to edit or delete. Add a new email address by clicking on the menu icon at the top of this box.



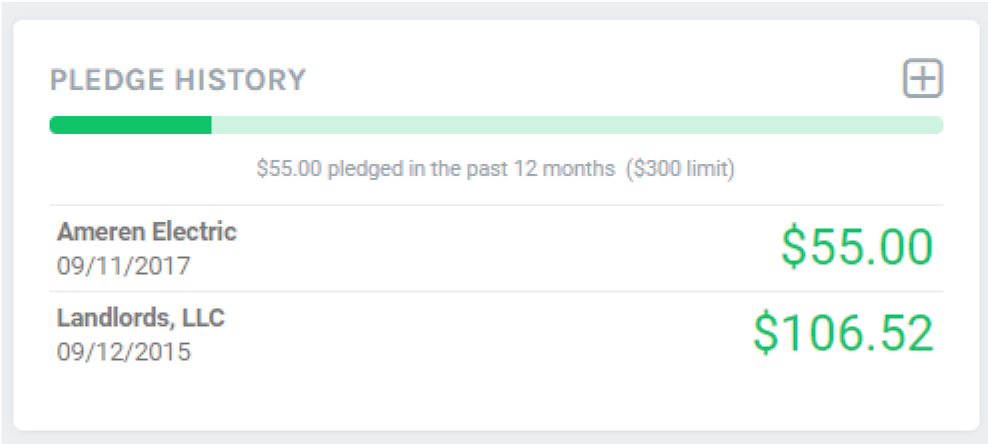
Visits: Displays history of visits for this client. Click on an entry to edit or delete. Add a new home visit by clicking on the menu icon at the top of this box. The location for a visit defaults to “Home”, but other locations are possible.



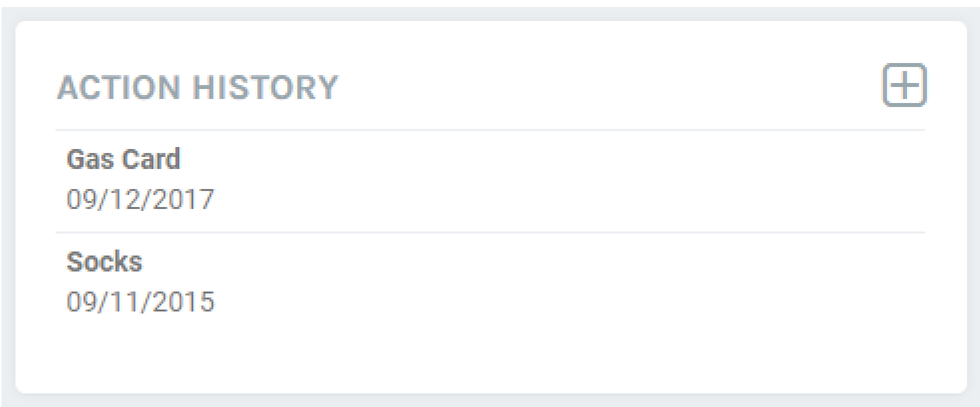
Household: Lists other people who live in the household. Click on a household member to edit or remove them. Add a new household member by clicking on the menu icon at the top of this box.



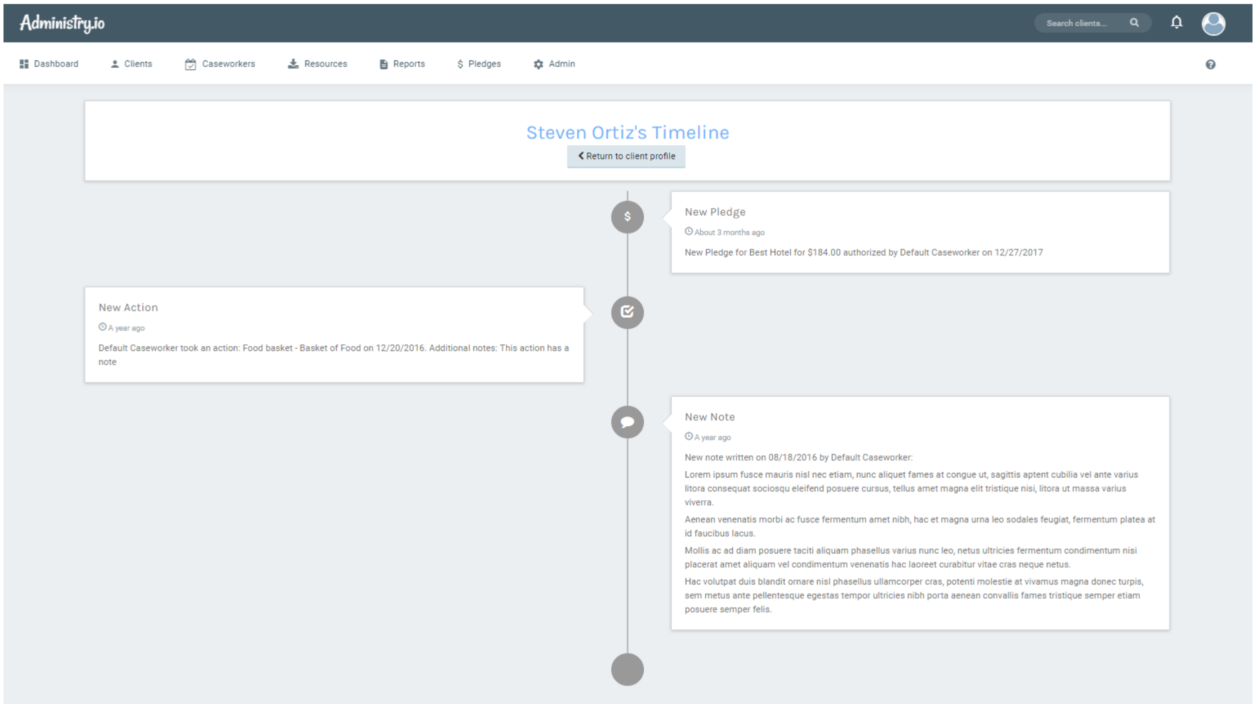
Pledge History: This box lists a summary of pledges made towards a client. The top bar indicates how much has been pledged towards this client in the past 12 months. The bar turns red when the pledge limit is matched or exceeded. Pledges are listed in chronological order, beginning with the most recent. Click on a pledge to view more information about a pledge, including payments made towards this pledge. See *Add a New Pledge*.



Action History: This box lists all actions taken on behalf of this client. *An Action includes any non-cash assistance, including food, gas cards, and referrals to other agencies.* Delete an action by clicking on it. See *Add a New Action*.



Client Timeline



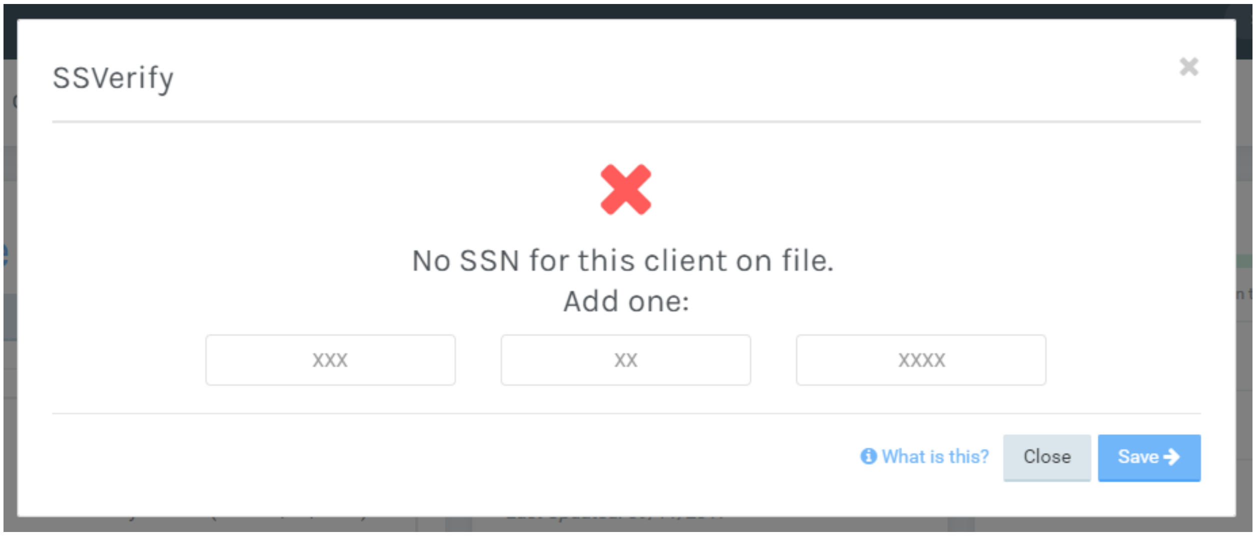
The Timeline button on the Client Dashboard displays client history in a timeline format, beginning with the most recent events. The time shows important events in the client's history, such as pledges, notes, actions, and flags. Click on 'Return to client view' to exit the timeline.

SSVerify

The SSVerify tool can help agencies verify the identities of clients to ensure funds are being used appropriately. When clients request assistance, caseworkers can use SSVerify to save a securely hashed copy of the client's social security number. Then, caseworkers can verify that clients are using the same social security each time they return for assistance.

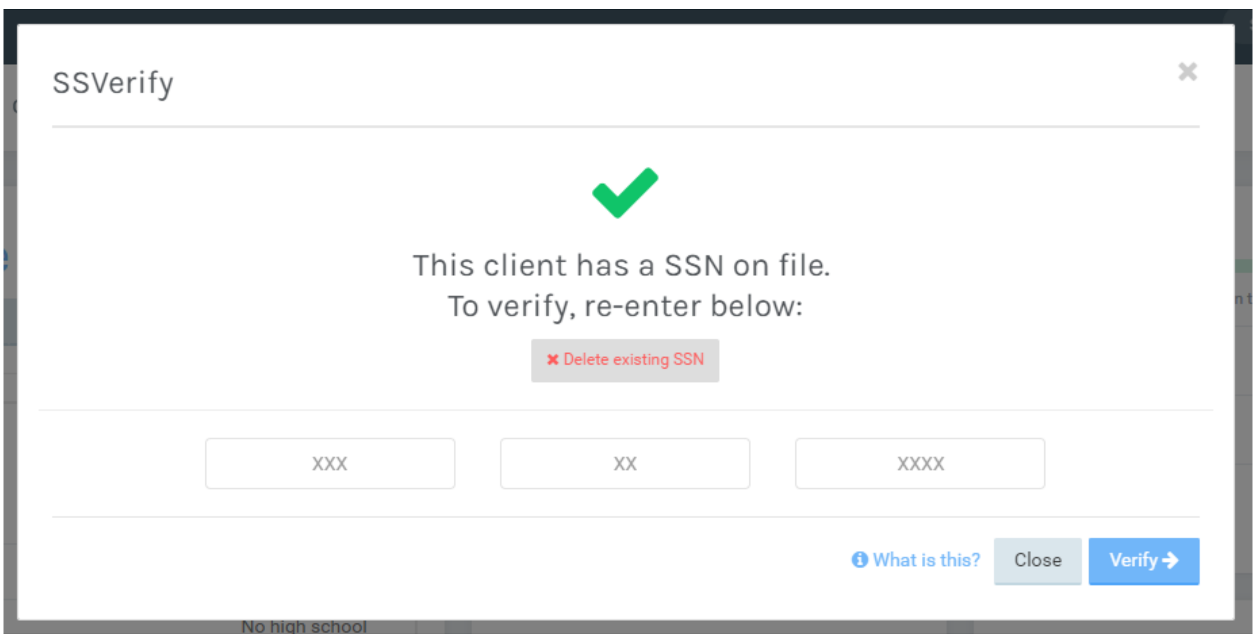
SSVerify is safe and secure - **Administry never stores social security numbers, and there is absolutely no way to extract a social security number from SSVerify.** Instead, this tool compares randomly and irreversibly hashed translations of social security numbers to ensure your clients' personal information is completely safe.

For privacy reasons, SSVerify does not search or communicate with any external services or databases to verify social security numbers. SSVerify can only confirm that a client is using the same social security number



To Add a SSN to SSVerify:

1. Log into Administry and *search for the client*.
2. Click on 'SSVerify' under the More dropdown menu below the client's name.
3. If a social security number has not been saved for this client, the tool prompts the caseworker to enter one.
4. Click 'Save' to save, or 'Cancel' to cancel.



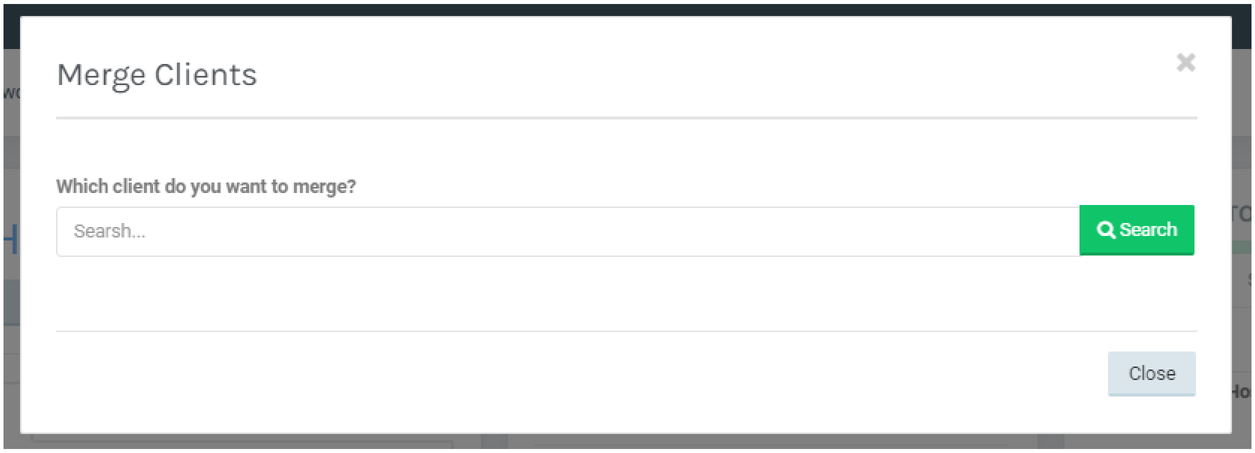
To Verify a SSN with SSVerify:

1. Log into Administry and *search for the client*.
2. Click on 'SSVerify' under the More dropdown menu below the client's name.

3. If a social security number has already been saved for this client, the tool prompts the caseworker to re-enter the number.
4. Click 'Verify' to compare the number with the number on file. A popup window displays whether or not the numbers match.
5. Caseworkers may also remove existing social security numbers by clicking "Delete existing SSN".

Note: Administry does not store social security numbers. There is no way to search by social security number, nor is it possible to view or retrieve a client's social security number in Administry.

Merging Clients



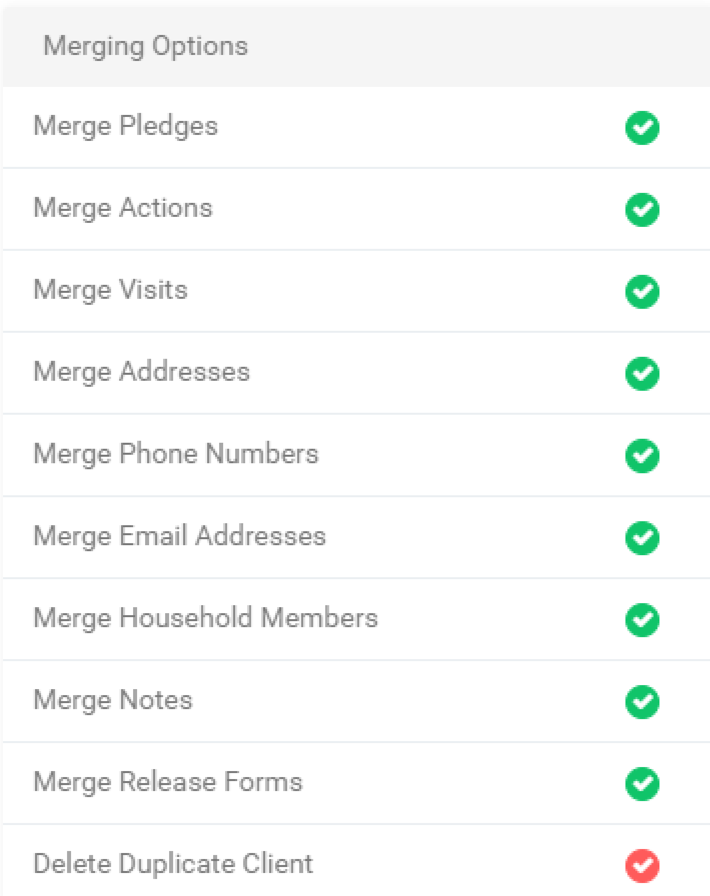
The Merge Tool allows users to combine client records that may have been duplicated in error. The tool can merge the following types of data:

- Pledges
- Actions
- Visits
- Household members
- Addresses
- Phone numbers
- Email addresses
- Confidentiality Release Forms

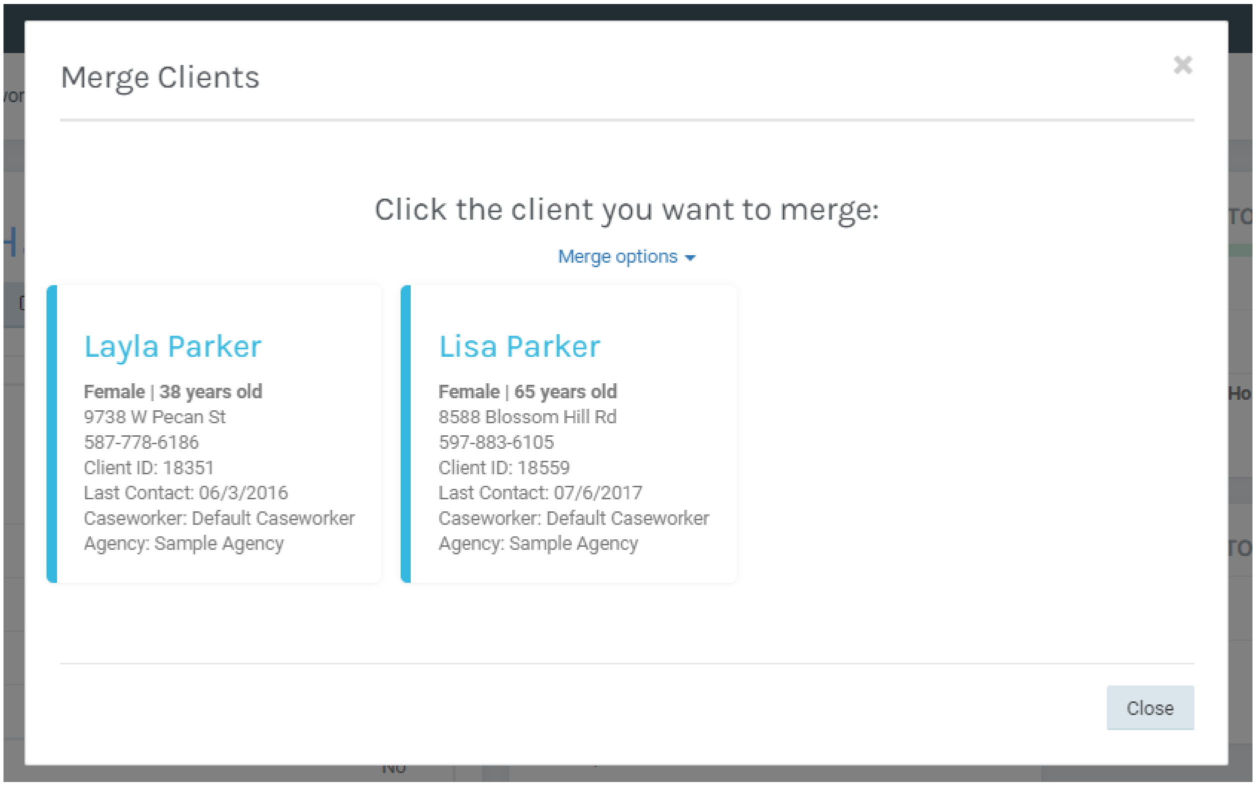
Note: Client demographic information (name, age, race, gender, etc) cannot be merged.

To Merge Clients:

1. Log into Administry and *search for the primary client* record
2. Click on 'Merge Another Client' under the More dropdown menu below the client's name
3. Once the window loads, search for the duplicate client you wish to merge into the currently loaded client record. You can search by first name, last name, or client ID
4. Click on Search to load clients matching search criteria
5. Click on 'Merge Options' to review information to be merged into the current client record



6. Click on the client you want to merge (be sure to check the client ID) and confirm your selection.



7. Once the merge process finishes, the merged client data should appear in the current client's dashboard. If the 'Delete Duplicate Client' option was checked, the duplicate client has been permanently deleted.

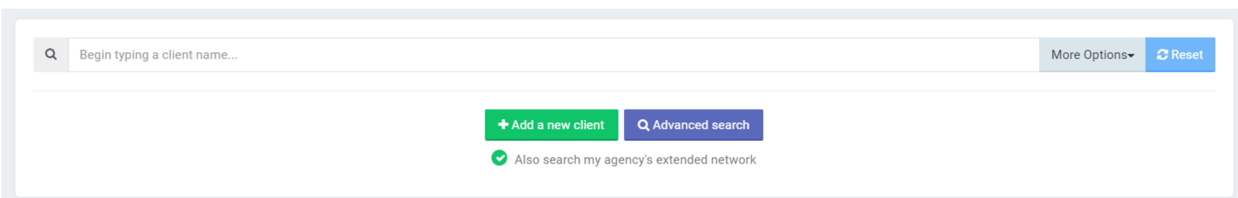
The merge tool also adds a note to the current client with details about what data was merged.

CHAPTER THIRTEEN

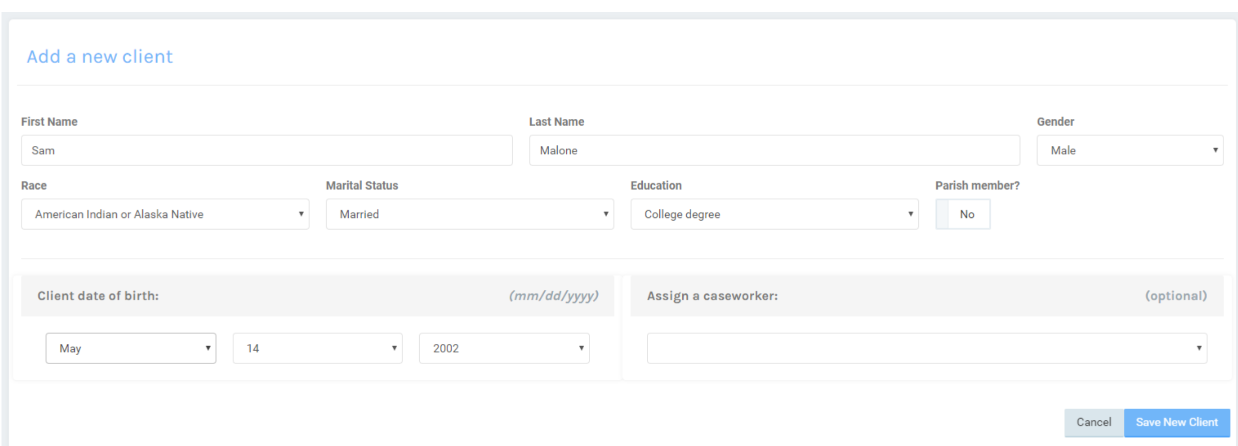
ADDING CLIENTS

All caseworkers can add new clients. It's recommended that caseworkers search for a client before adding a new one, but Adminsitry will also alert caseworkers when they try to add a client with a similar name.

From the Search screen



1. On the Search screen, click on the More Options button, then Add New Client. Alternatively, click on Add Client from the Clients menu.
2. Add as much of the client's information as possible. You can edit this information later.



First and Last Name: At minimum, a new client must have a first or last name. New clients cannot be created if both the first and last name is blank.

Gender, Race, Education, and Marital status: These options are defined in the *Demographics Setup* by users with administrator access.

Parish member: This option determines the maximum pledge amount. Members generally have higher pledge limits. These amounts are defined by users with administrator access in the *settings* area.

Client date of birth: Enter a birthdate in mm/dd/yyyy format. This is optional, and partial birthdates are not allowed. Several Administry reports are driven off birthdate, so add one if possible.

Assign a caseworker: Assign a caseworker to this client. This is an optional field, but if this is not set, Administry assumes the last caseworker to interact with this client is his or her assigned caseworker.

3. Click Save to add the client to Administry. The Client Dashboard should now load, where you may add phone numbers, addresses, pledges, and other client information.

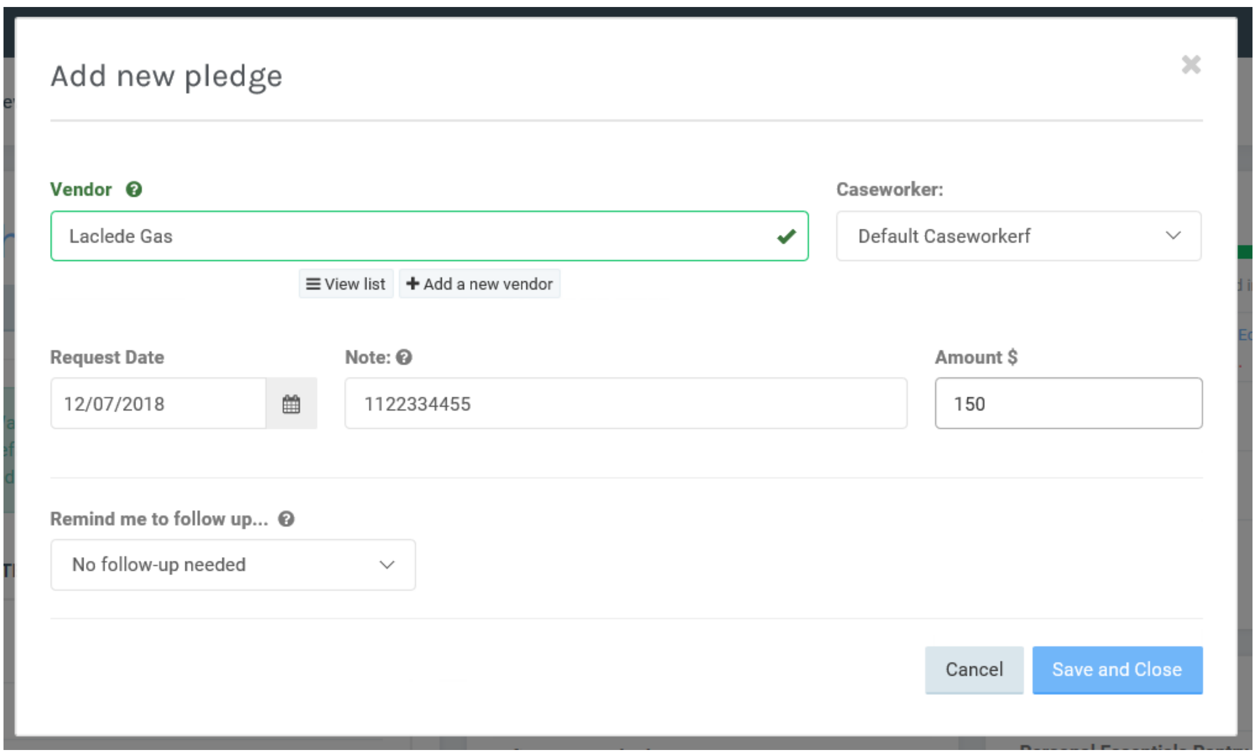
CHAPTER

FOURTEEN

ADDING PLEDGES

A **Pledge** is any kind of financial assistance provided on behalf of a client. Pledges are sent to *Vendors*, which are landlords, utility companies or other businesses to whom a client owes money.

After determining to make a pledge on behalf of a client, a caseworker should enter it into Administry.



1. Log into Administry and *search for the client*.
2. In the Pledge History box, first ensure that the client is below his or her pledge limit.
3. To add a new pledge, click on the plus sign at the top of the Pledge History box. (If your account lacks sufficient permissions, or if there is a Flag preventing pledges for this client, pledges may not be possible for this client. Contact one of your administrators with questions.)

4. Once the Add New Pledge window opens, search for the appropriate Vendor from the Vendor list. Ensure the mailing address matches the mailing address on the client's invoice, lease, or bill.
5. If the vendor does **not** appear in the Vendor list, click "Add a new vendor to this list". This opens a new window where to enter information for a new vendor. Type carefully - this address and other contact information will be used to submit payment to the vendor! Click save to resume adding a pledge.
6. Caseworkers cannot change the Caseworker field; only administrators can assign a pledge to another caseworker.
7. Ensure the amount of the pledge is entered correctly.
8. In the Note field, enter the client's account number or invoice number found on their bill. This information will be transferred to the memo line on the check your organization sends to the vendor. Ensure this field contains enough information for the vendor to tie this pledge to your client.
9. If you'd like Administry to automatically remind you to follow up about this pledge, change the "Remind me to follow up..." select box, and then add a note to remind you about follow-up details. Only you will see these notes.
10. Click Save & Close.

Note: Pledges that exceed the annual limit for this client will go into an approval queue and must be *approved* by an administrator before being finalized.

Note: Pledges made to a new Vendor will go into an approval queue and must be *approved* by an administrator before being finalized.

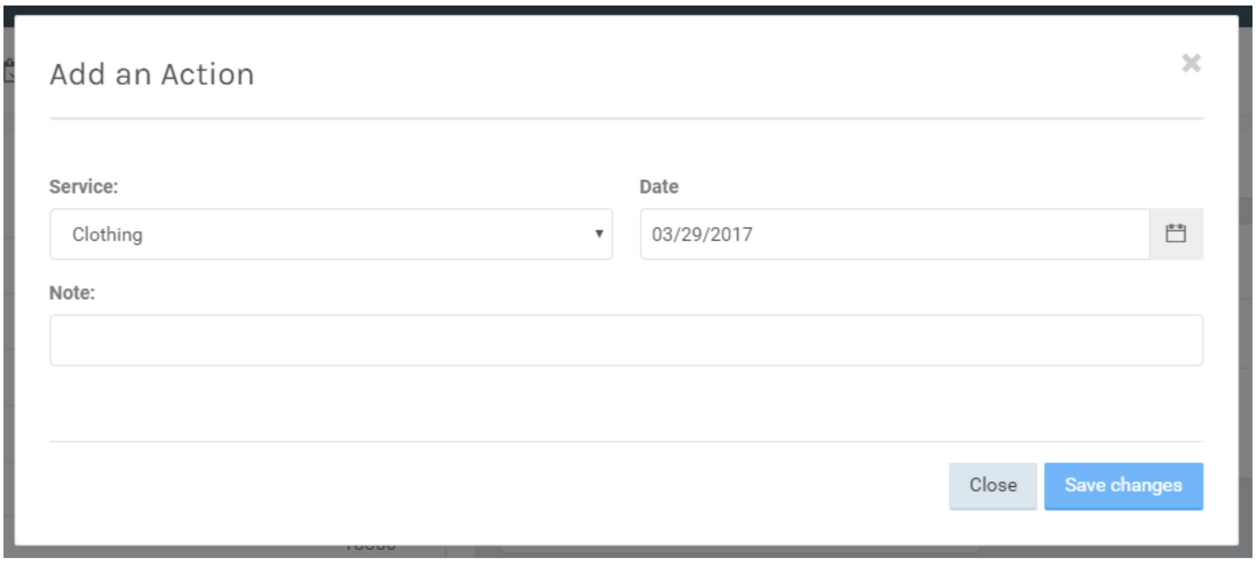
Caseworkers can edit their pledges only while they are in the approval queue. Once pledges have been finalized, they cannot be edited or deleted. If a pledge can be edited, an Edit button will appear next to the pledge in the Pledge History List.

CHAPTER

FIFTEEN

ADDING ACTIONS

An **Action** is any non-pledge assistance provided to a client, including food, gas cards, and referrals to other agencies. Actions are categorized by **Services** - that is, an Action is made for a Service, much like a Pledge is made to a Vendor.



1. Log into Administry and *search for the client*.
2. Click on the menu button at the top of the Action History box.
3. Once the Add New Action box loads, select the appropriate service from the dropdown list.
4. Set the date the action was taken.
5. The note field is optional, and provides a place to add additional explanation about the action.
6. Click Save & Close.

If a service does not appear in the dropdown list, it should be added as a note instead. Close the Add a New Action window without saving, and see *Adding client notes*. You may also want to contact an agency administrator to add the action to the service list.

CHAPTER SIXTEEN

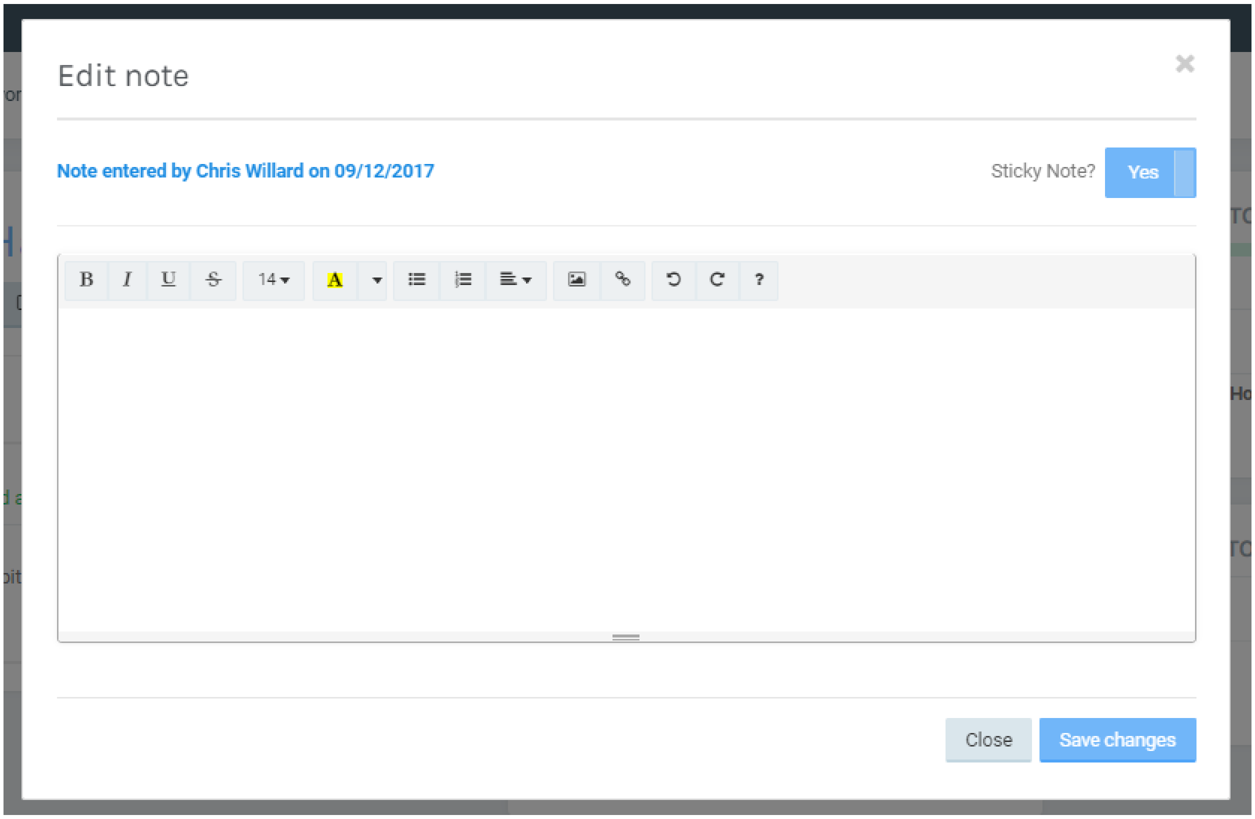
CLIENT NOTES

Client notes are very important for providing well-rounded care for your clients. Notes are also the main way you can communicate with other caseworkers. If your client comes back to your organization next month for help, another caseworker may be the one to provide assistance. A note can help that caseworker understand the reasoning behind your pledges and referrals.

Note: NEVER store social security numbers, credit card numbers, bank account information, or other sensitive data in Administry. Optionally, social security numbers may be verified using Administry's SSVerify Tool. Account numbers for utility payments, etc. should only be added in the appropriate pledge request fields.

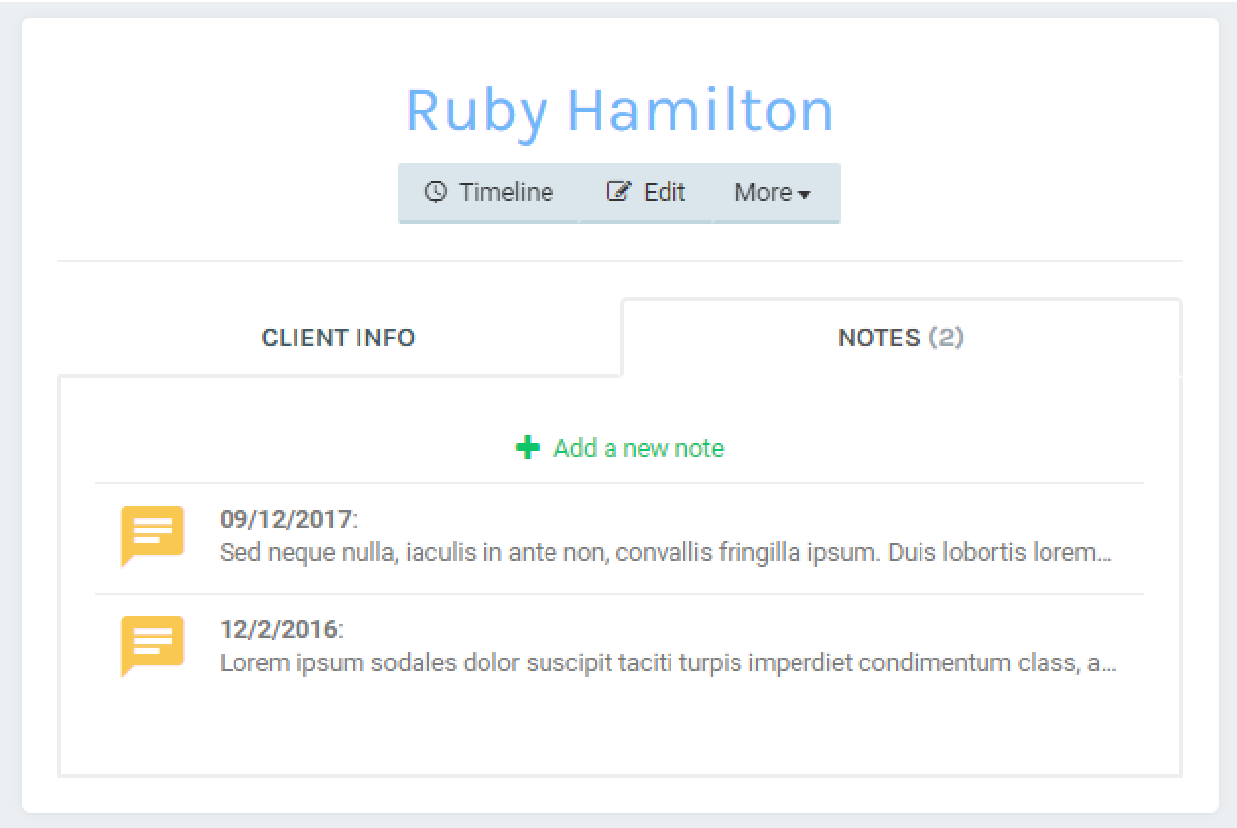
Note: Notes are not private. Any information added to a client note is viewable by other users within the same agency. If your agency chooses to share data with partner agencies, notes may be viewable outside your agency as well. Never add confidential, medical, financial, or other sensitive information to client notes.

Add a new note



1. Log into Administry and *search for the client*.
2. Click on the More Actions dropdown and then click Add a Note.
3. Once the Note window opens, add your note in the note area. The top menu bar provides options to change fonts and colors, add images, and insert links.
4. **Make Sticky Note:** Select this option if this note should appear first in the list of notes.
5. When finished, click Save. You can edit your note later if you need to make changes. Administrators can edit any note, but caseworkers can only edit their own notes.

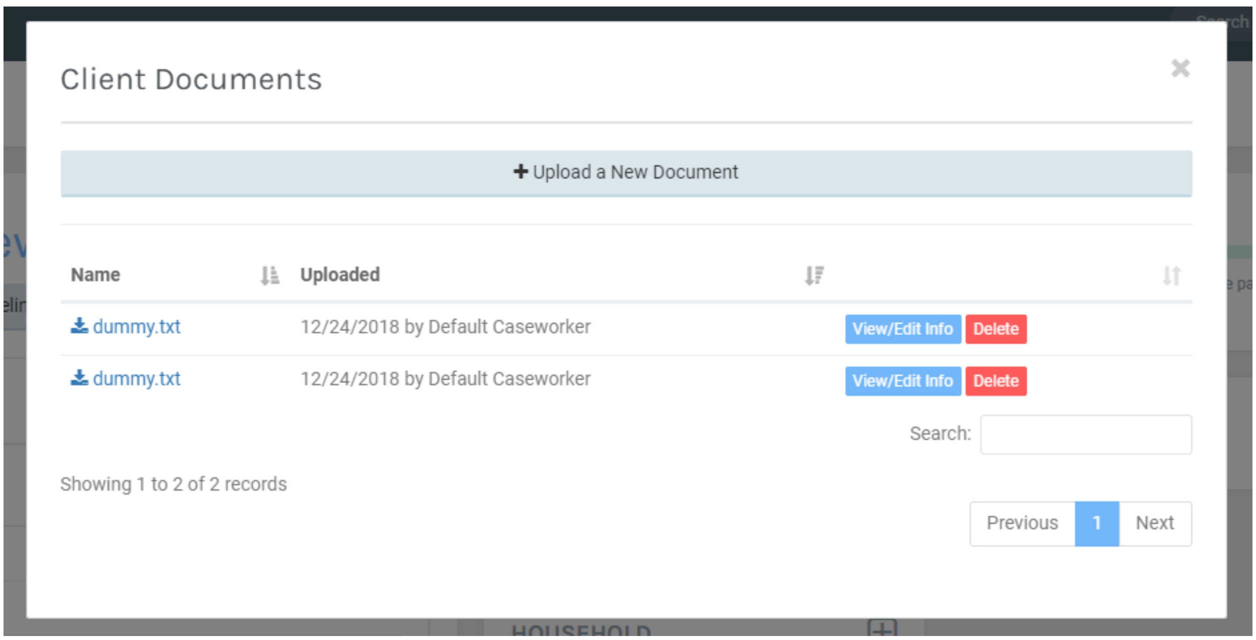
View/Edit existing notes



1. Log into Administry and *search for the client*.
2. Click on the Notes tab and locate the note you want to view or edit. Click on it to open the Note Viewer.
3. If you are the original author of this note - or if you are an administrator - edit the note by clicking Edit.

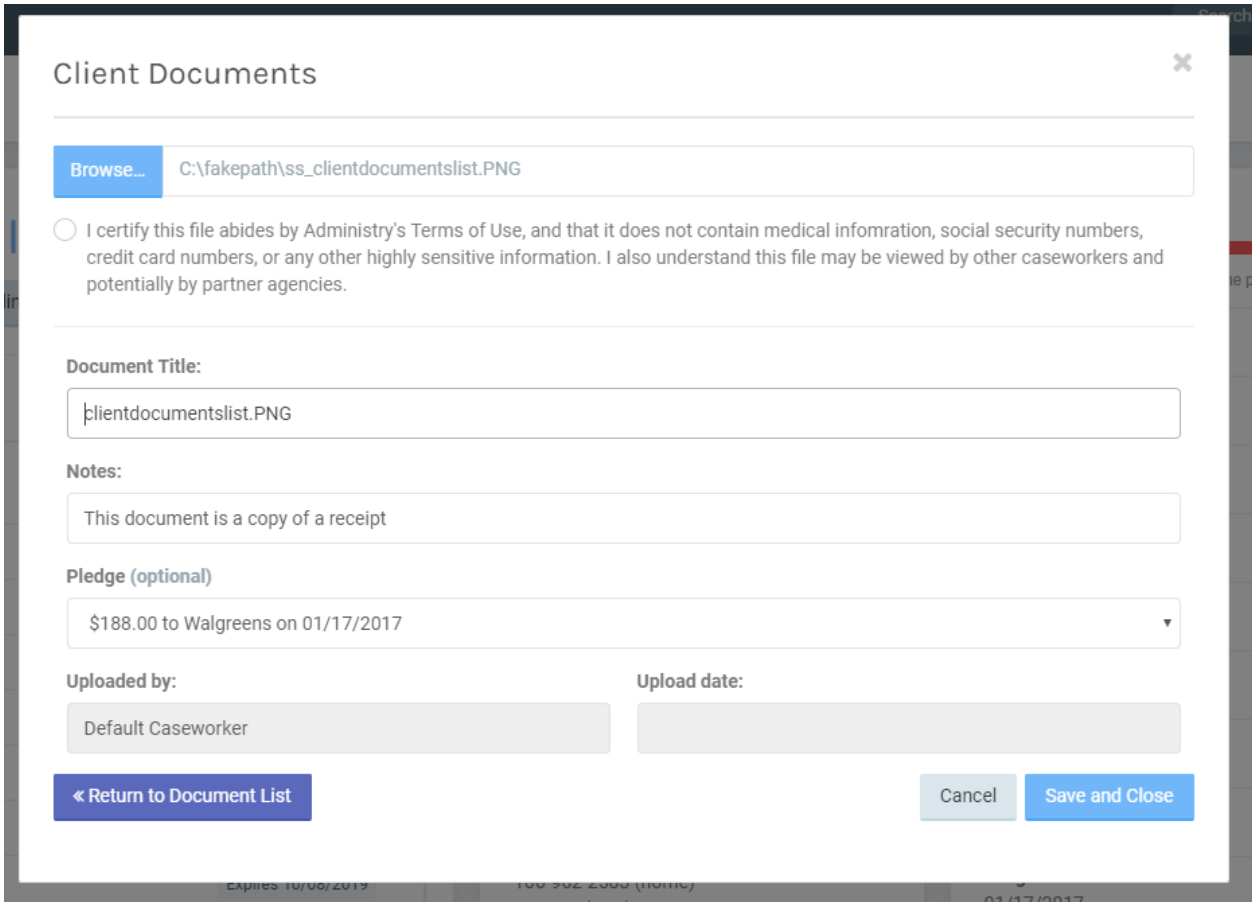
CHAPTER SEVENTEEN

CLIENT DOCUMENTS



The Client Document feature allows users to upload files and attach them to specific client records, and optionally, attach them to specific pledges as well. Users may select files saved from their computer, or take a photo of a document with their mobile device.

Note: Allowable file types include PDF, JPEG, PNG, TIFF, GIF, TXT, DOC, XLSX, and more. Uploaded files must be smaller than 25 MB.



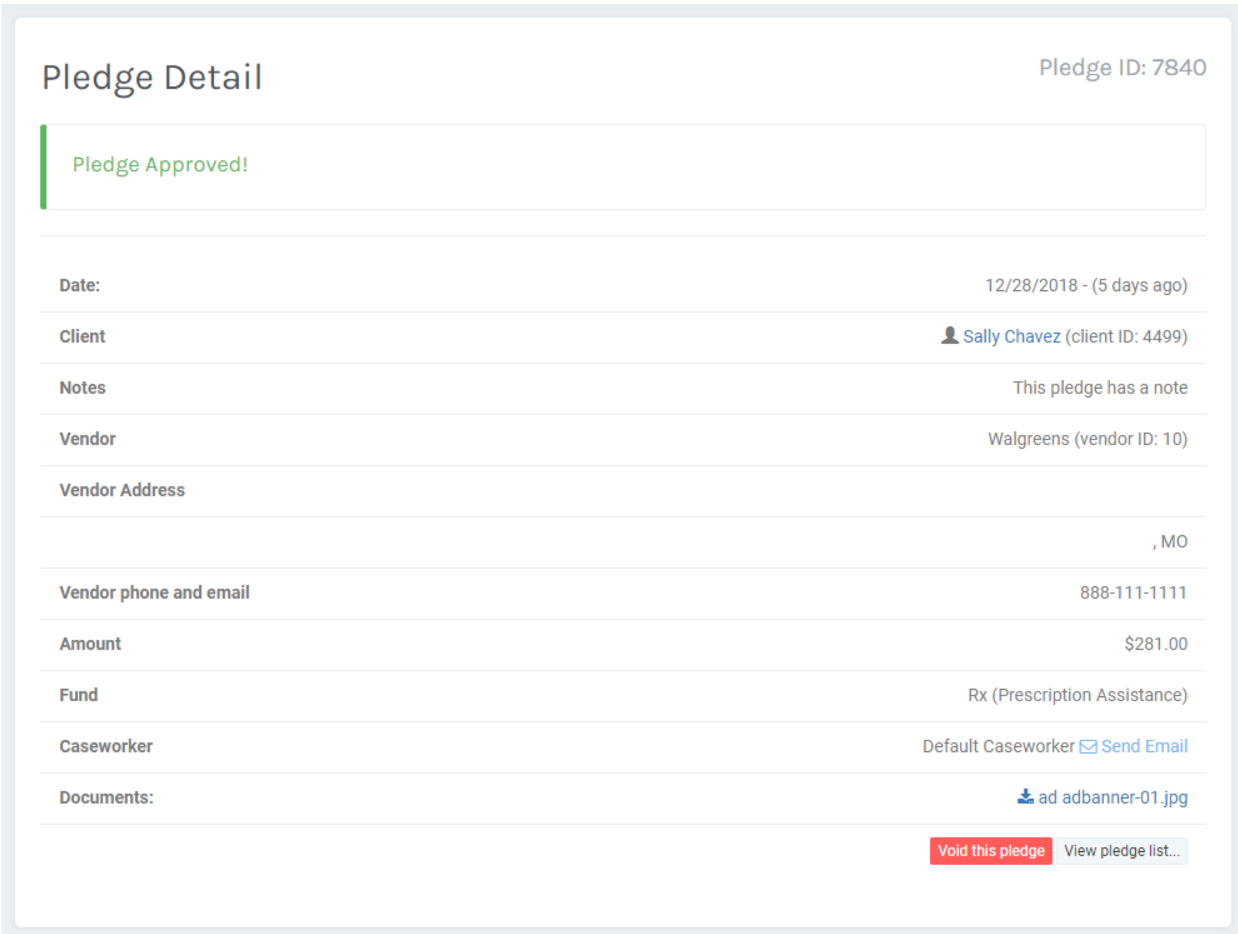
To add a new document:

1. Load a client profile and select the Documents option in the More dropdown menu.
2. Once the popup window loads, click on the "Upload a New Document" button.
3. Click "Browse..." to select a file to upload. If you're on a mobile device, you should be prompted to take a new photo or select an existing file.
4. After selecting your file/photo to upload, the local filename should appear in the readonly box next to the browse button. This simply displays where the file exists on your computer. The filename should also be added to the Document Title field - this is what the document will be called inside Administry, and users can edit this field.
5. Update the Document Title and Notes fields. These can be changed later as well.
6. If this document should be attached to a specific pledge, select the pledge from the Pledge dropdown box. Leave it blank if the document should only be attached to the client. This can be changed later.
7. The Uploaded By and Upload Date boxes will be filled in automatically, and cannot be changed.
8. Click save and close. Once the file uploads, you should see it appear in the Client Document List.

Viewing Documents:

All available documents for a given client are visible in the Client Document List. To view/download a document, click on the title. This will begin a download to your computer or mobile device, where the document can be opened with an appropriate installed program (such as Adobe Reader, Microsoft Excel, etc.).

If a client document has been attached to a specific pledge, it will also appear on the single pledge view screen. To view the single pledge view screen, click on a pledge (on the client profile or the pledge list). Once it loads, any client documents will be listed next to Documents:



Note: Users may not edit and re-upload client documents. If a client document needs to be altered, download it, delete it from Administry, and re-upload.

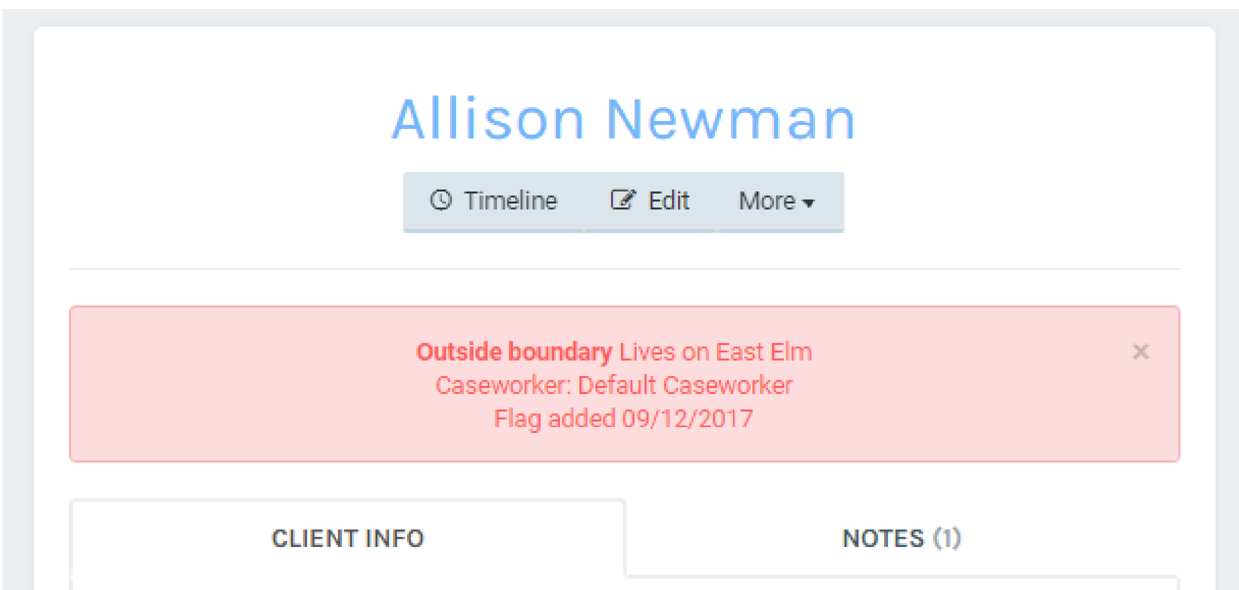
CHAPTER

EIGHTEEN

CLIENT FLAGS

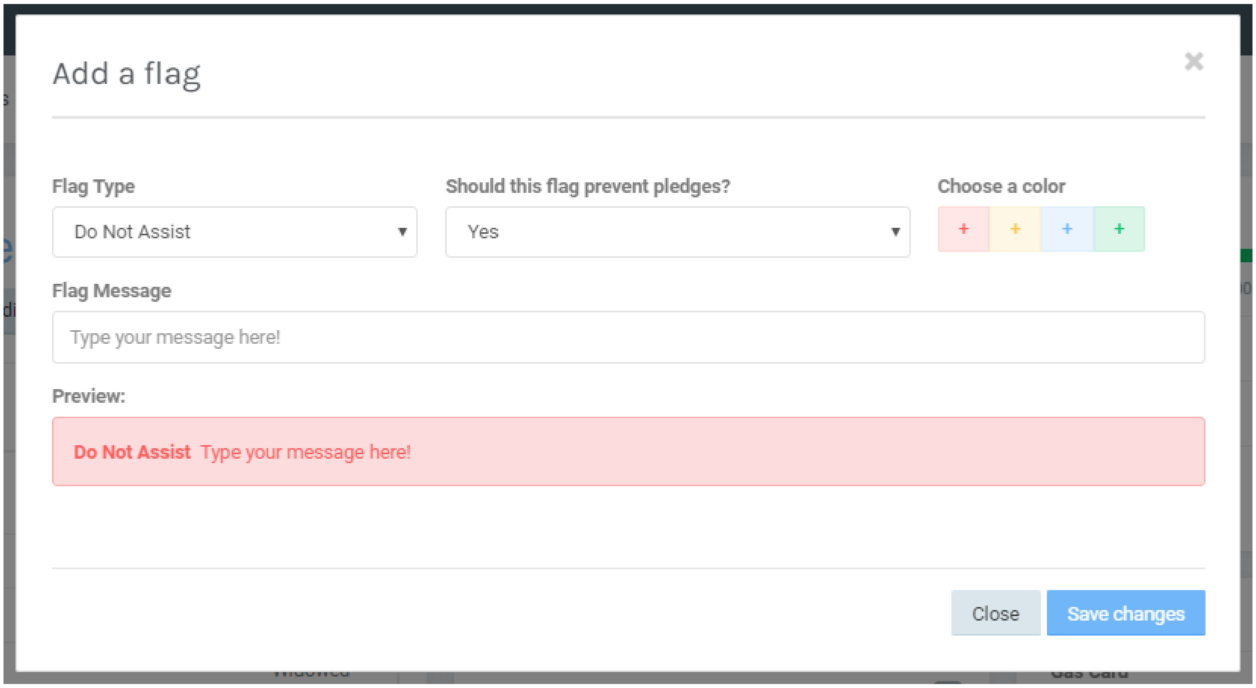
Caseworkers can flag clients to communicate important messages to other caseworkers about a client. Flags can be customized, and can even be used to prevent new pledges from being made on behalf of a client.

Flags appear prominently on the Client Dashboard:



To add a new flag:

1. Load a client *by searching for a client*.
2. Click on the 'More' button below the client name, and click on 'Flag Client'. This loads the flag editor:



3. Fill in the appropriate fields to customize the flag:

Flag Type Sets the heading for the flag. "Do not assist", "Alert", and "Pledge in Progress" are available options.

Should this flag prevent pledges? Set to 'Yes' if flag should prevent other caseworkers from making pledges toward this client. Note: If the *setting* "Any user can remove flags?" is set to 'No', no pledges can be made on behalf of this client until an administrator removes the flag.

Choose a color Sets the display color for the flag

Flag message Sets the display message for the flag. This should be descriptive enough to explain the reason for the flag, but not too long. Longer messages should be added as *notes*.

Preview This will update to show a preview of the flag.

4. Click 'Save Changes' to add the flag or 'Cancel' to cancel.
5. Once saved, the flag should appear on the client dashboard.

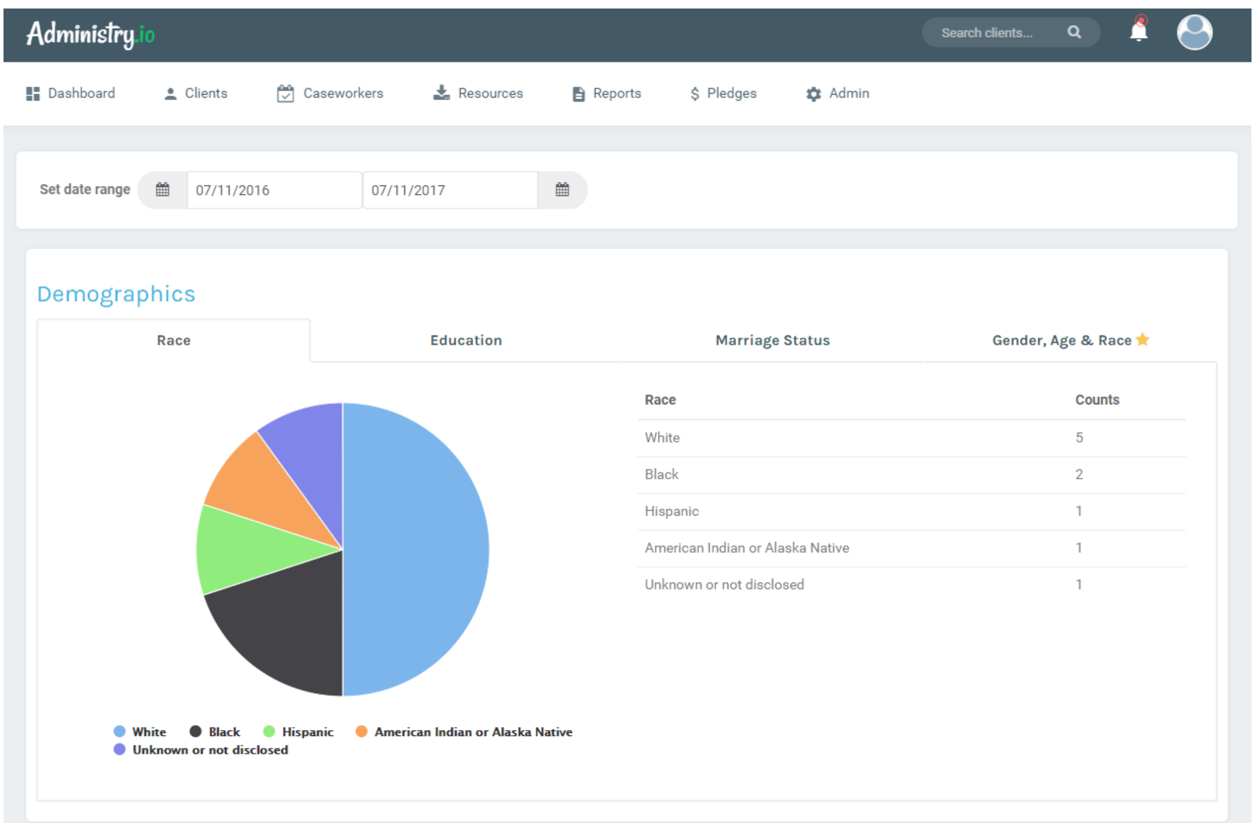
CHAPTER

NINETEEN

REPORTS

Administry provides several reports to summarize and visualize your agency's data.

Demographic Reports



These reports allow you to break down clients by age, race, gender, and other categories. For the purposes of this reports, clients are only counted when they have had an approved pledge during the date range set for the report. To access these reports, select Demographic Reports under the Reports menu. Available reports include:

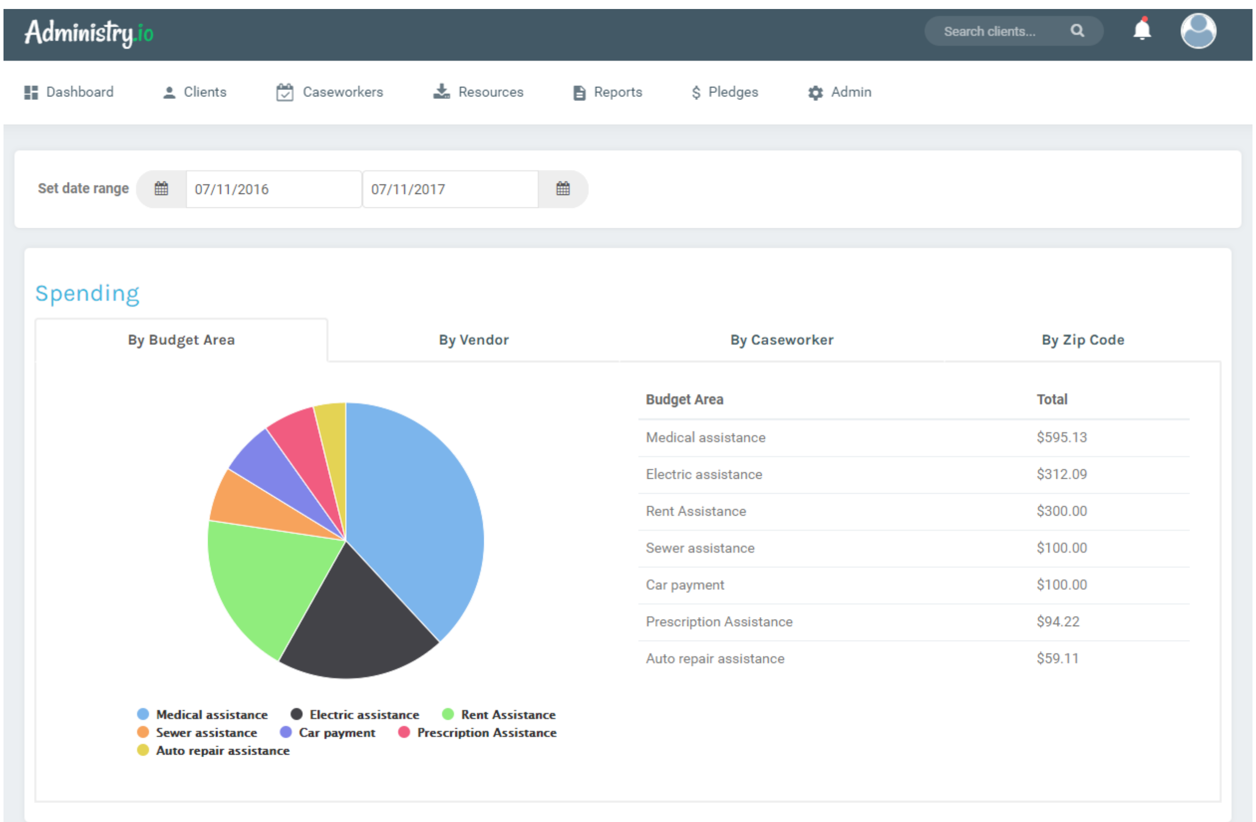
Race: Breakdown of clients by race designation. Use the date filter at the top of the page to limit results.

Education: Breakdown of clients by education level. Use the date filter at the top of the page to limit results.

Marriage status: Breakdown of clients by marriage status. Use the date filter at the top of the page to limit results.

Gender, Age & Race: Breakdown of clients by gender, age, and race. Age ranges may be changed by contacting Administry support. Use the date filter at the top of the page to limit results. Use the dropdown at the top to select gender. Use the second dropdown at the top of the page to count clients only or all people in the client's household.

Pledge Reports



These reports allow you to break down dollars pledged to clients. These reports may not reflect **actual** amounts spent. To access these reports, select Pledge Reports under the Reports menu. Available reports include:

By Fund: Breakdown of pledge dollars spent by fund. Use the date filter at the top of the page to limit results. This report does not include pending pledges that have not been approved.

By Vendor: Breakdown of pledge dollars spent by vendor. Use the date filter at the top of the page to limit results. This report does not include pending pledges that have not been approved.

By caseworker: Breakdown of pledge dollars spent by caseworker. Use the date filter at the top of the page to limit results. This report does not include pending pledges that have not been approved.

By zip code Breakdown of clients by zip code for the client's primary address. Use the date filter at the top of the page to limit results. This report does not include pending pledges that have not been approved.

Spending Reports

If your agency has enabled the Payment Module, these reports allow you to break down actual expenses recorded as Payments and Fund Transactions. To access these reports, select Spending Reports under the Reports menu. Available reports include:

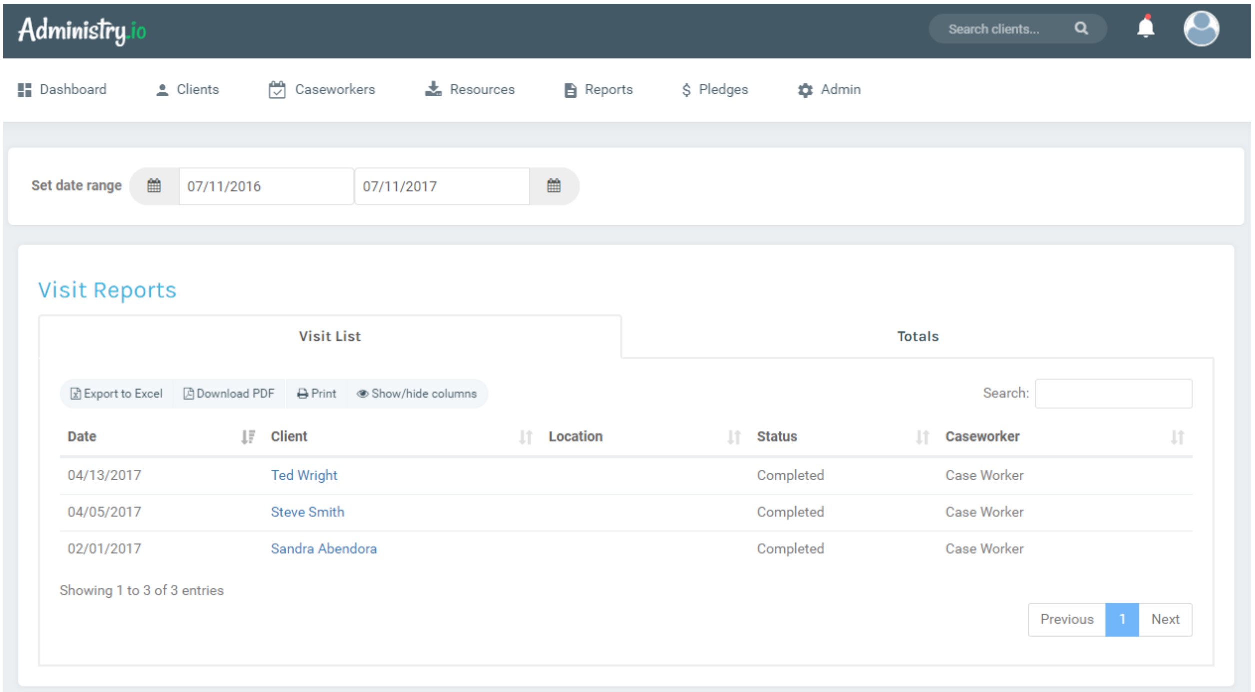
By fund: Breakdown of pledge dollars spent by fund. Use the date filter at the top of the page to limit results. This report does not include payments or transactions that have been voided.

By Vendor: Breakdown of pledge dollars spent by vendor. Use the date filter at the top of the page to limit results. This report does not include payments or transactions that have been voided.

By caseworker: Breakdown of pledge dollars spent by caseworker. Use the date filter at the top of the page to limit results. This report does not include payments or transactions that have been voided.

By zip code Breakdown of clients by zip code for the client's primary address. Use the date filter at the top of the page to limit results. This report does not include payments or transactions that have been voided.

Visit Reports

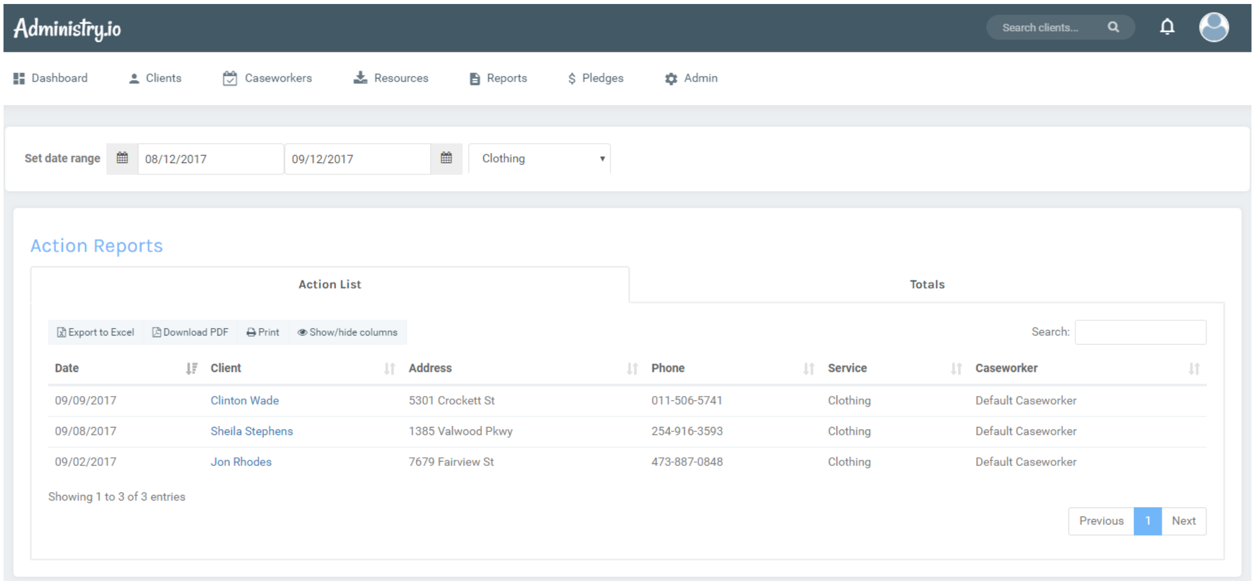


These reports provide information about client visits. Use the date filter at the top of the page to limit results. There are 2 types of visit reports:

Visit list: This report provides a listing of all visits recorded within the specified date range. Report can be sorted by clicking on the column headers, and filtered by entering a search term in the search box at the top of the table. Report may be exported to printed, Excel, or PDF.

Totals: This report counts all **completed** visits during the specified date range. The report categorizes sums by visit location.

Action Reports



These reports provide information about actions taken on behalf of clients. Use the date filter at the top of the page to limit results. There are 2 types of action reports:

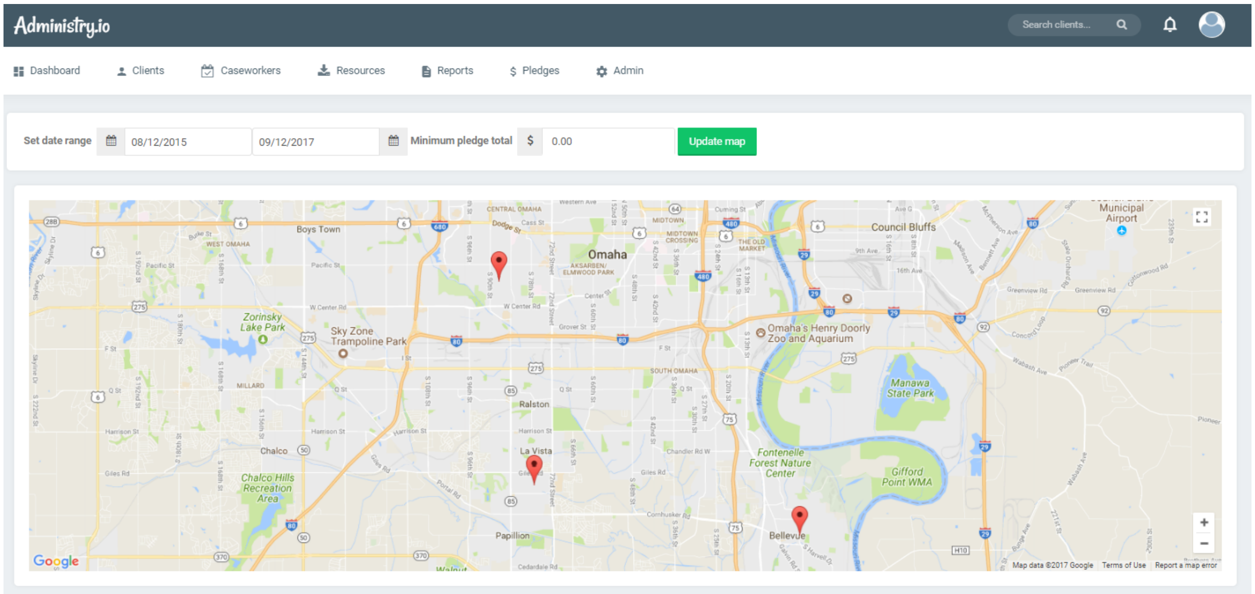
Action List: This report provides a listing of all actions recorded within the specified date range. Click on the service type dropdown next to the date range filter to view actions of specific types. Report can be sorted by clicking on the column headers, and filtered by entering a search term in the search box at the top of the table. Report may be exported to printed, Excel, or PDF.

Totals: This report counts all actions categorized by service type. The 'Total Value' column multiplies the number of actions by the amount in the service value field (see more information in the *services* page).

Pledge Map

This report displays pledges on an interactive map to help caseworkers better understand their agency's geographical impact. Use the date filter at the top of the page to limit results.

- The 'Minimum pledge total' box can be used to exclude pledge totals below a certain amount. For instance, a value of $100 will remove all pledge totals less than $100 from the map.
- Drag the map to pan, and use the map controls to zoom in and out.
- Click on a pin to view the number of pledges and the total dollars pledged during the specified date range.



Custom Reports

This section is where you can find other reports about your agency's work. Administry Support can help you dig into your data by creating new custom reports based on criteria you provide. These reports are dynamic, so you can run them anytime you want to see up-to-date data.

- To request a new custom report, create a support ticket.

CHAPTER

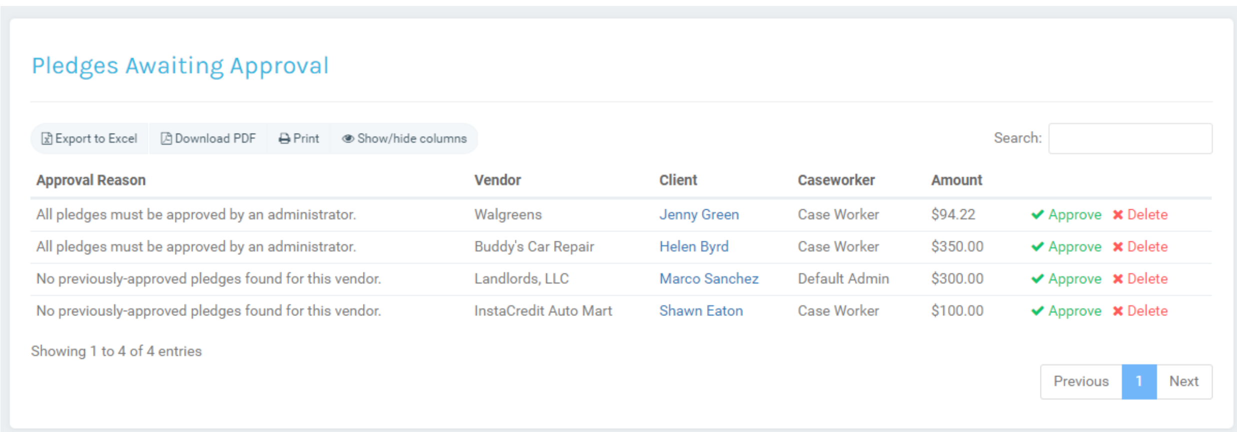
TWENTY

APPROVING PLEDGES

Some pledges must be approved by an administrator:

- whenever a pledge exceeds the client's annual pledge limit;
- whenever a pledge is made to a new vendor;
- whenever the "Admin must approve all pledges" setting is set to 'Yes'

Administrators receive a notification each time a pledge is made that needs approval.



Pledges Awaiting Approval

Export to Excel | Download PDF | Print | Show/hide columns

Search:

Approval Reason	Vendor	Client	Caseworker	Amount	
All pledges must be approved by an administrator.	Walgreens	Jenny Green	Case Worker	$94.22	Approve Delete
All pledges must be approved by an administrator.	Buddy's Car Repair	Helen Byrd	Case Worker	$350.00	Approve Delete
No previously-approved pledges found for this vendor.	Landlords, LLC	Marco Sanchez	Default Admin	$300.00	Approve Delete
No previously-approved pledges found for this vendor.	InstaCredit Auto Mart	Shawn Eaton	Case Worker	$100.00	Approve Delete

Showing 1 to 4 of 4 entries

Previous 1 Next

To approve a pledge

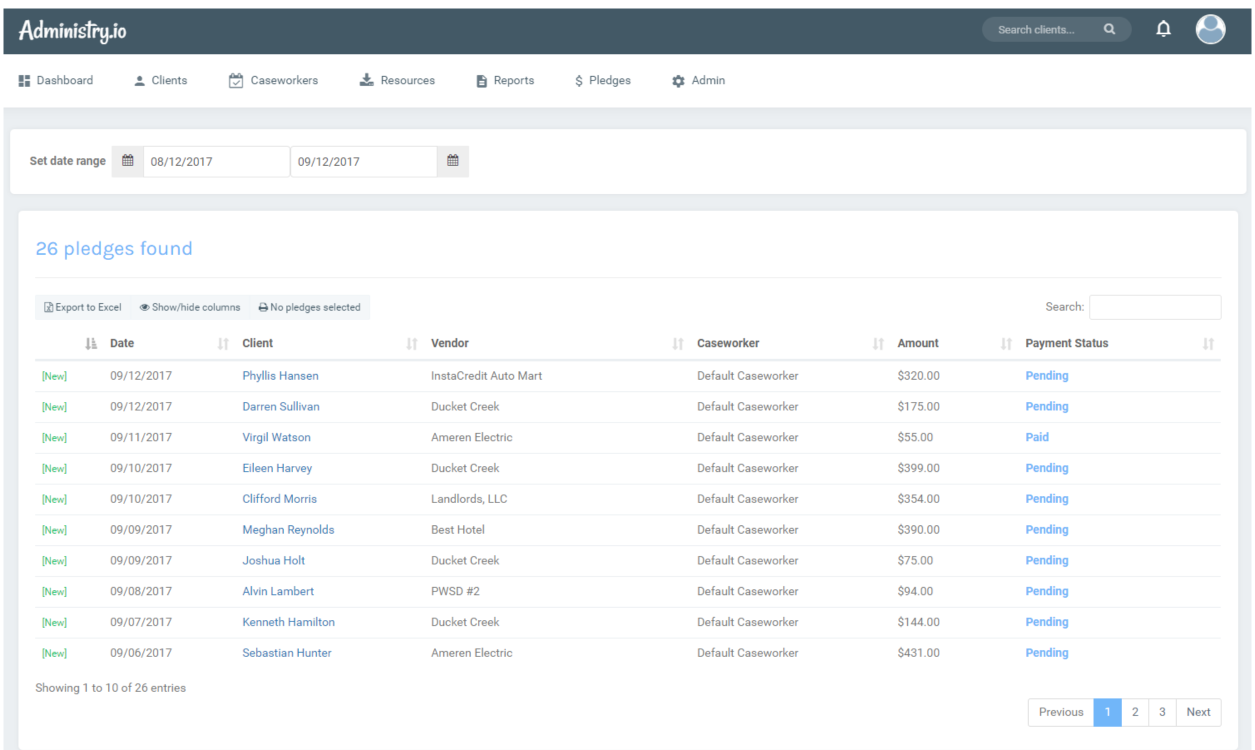
1. Click on Approvals in the Pledges menu
2. Once the list of Pledges Awaiting Approval loads, review any pledges waiting to be approved. Click on the client's name to visit the client's profile.
3. To approve a pledge, click Approve. To cancel a pledge, click Delete.

Approved pledges are visible on the *Print Pledges screen*.

CHAPTER TWENTYONE

PRINTING PLEDGES

After a pledge has been made by a caseworker and *approved* by an administrator (if necessary), pledges appear on the Print Pledges screen. This screen allows administrators to print check requests that can be sent to your organization's financial secretary to write and mail a check to the vendor.



To print a pledge request:

1. Click on Print Pledges in the Pledges menu.
2. Once the pledge list loads, locate the pledge you want to print. The date filter at the top can help locate pledges made within a certain time period.
3. Pledges that have *not* yet been printed appear with a green [NEW] indicator.

4. Click on pledges you want to print. Multiple selections are allowed, and the number of selected pledges is visible in the green Print button at the top of the list.
5. To print, click the green Print button at the top of the list. A popup window (or new tab) will open, and will ask for your permission to print the screen.
6. Close the popup window (or new tab) to return to the Print Pledges screen.

Note: Pledges that are awaiting approval do not appear in the Print Pledges list. In order to print these pledge requests, visit the Approvals page.

CHAPTER TWENTYTWO

PAYMENTS

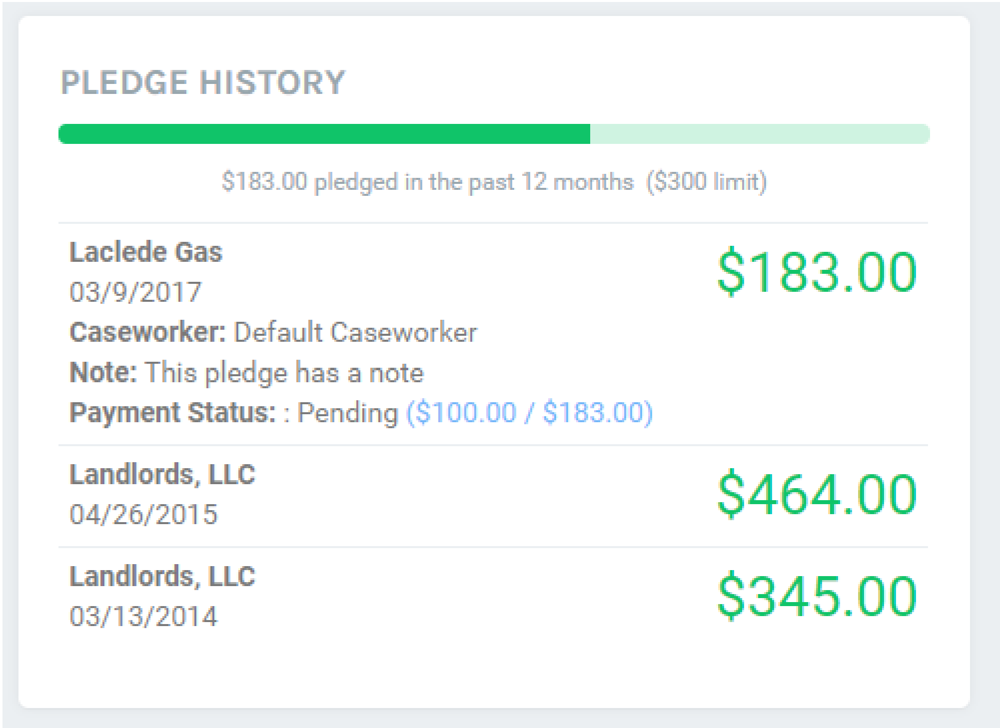
The Payment module allows agencies to track payments made towards a pledge. This can be enormously helpful for tracking checks, twinning arrangements, and client contributions.

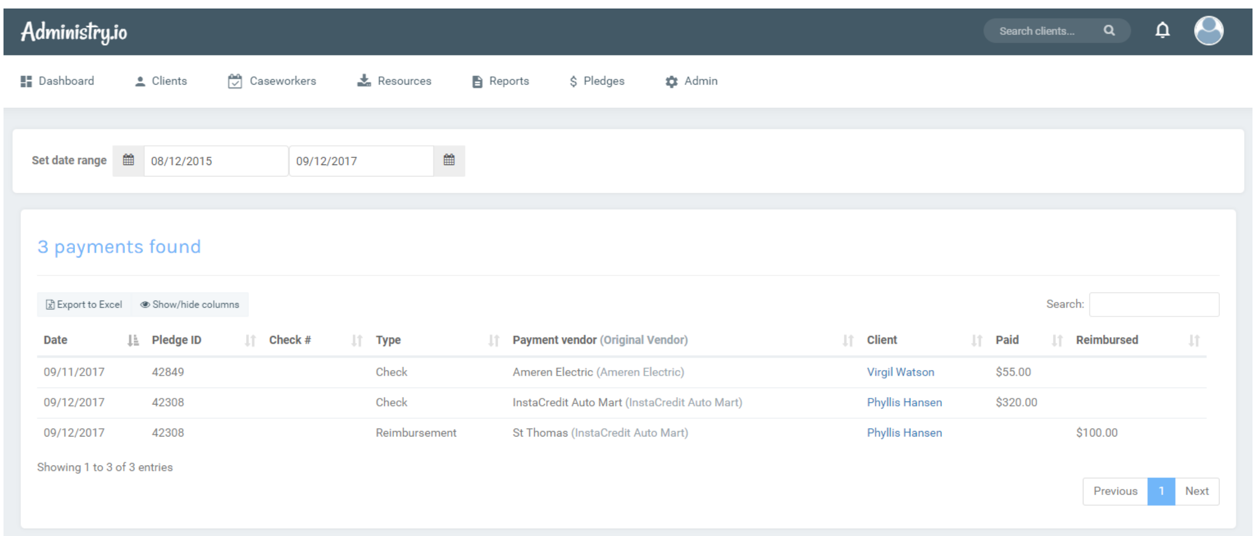
Note: The Payment module must be enabled by an Admin on the Settings screen.

To view payment status from a client profile:

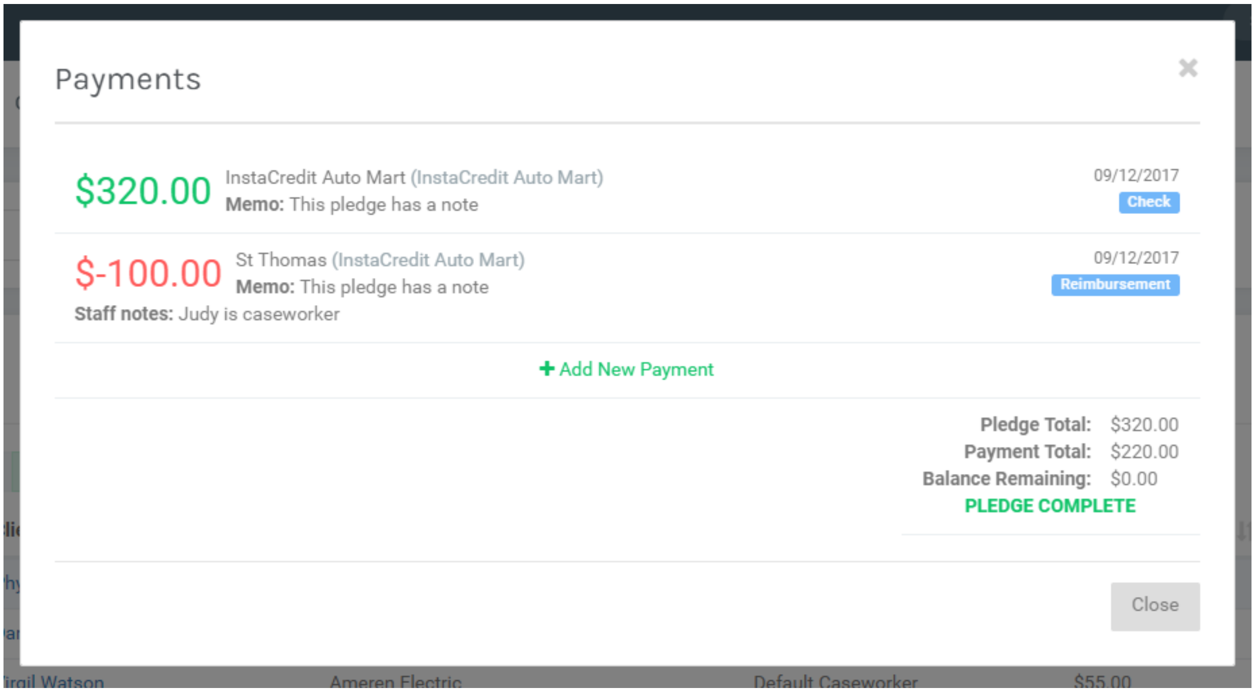
1. Log into Administry and *search for the client*.
2. On the Pledge History box, click on a completed pledge to view details about the pledge.
3. The Payment Status indicator shows whether payment is still pending, or if the pledge has been fulfilled. The blue text also indicates how much has been paid towards this pledge. (Note that this takes into account any twinning or other reimbursement pledges.)

To view, add, or edit payments for a pledge:



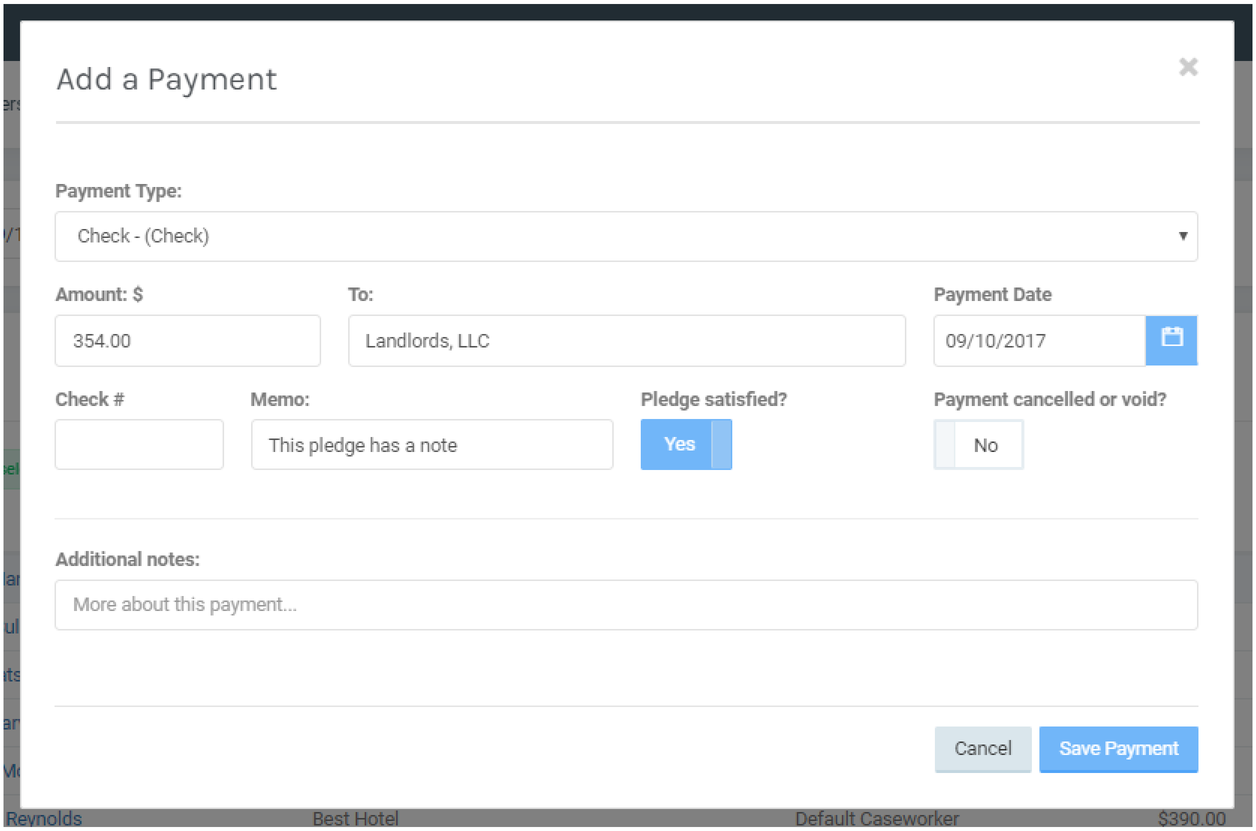


1. Pledge payments can be viewed in two ways: 1) from the client profile; or 2) from the Pledges screen under the Pledges menu. In either case, click on the payment status to load the payments viewer.



2. The payment viewer lists all payments made toward this pledge, as well as the net cost of the pledge (agency payments minus reimbursements). If a pledge has been marked as fulfilled, **PLEDGE COMPLETE** appears at the bottom of the payment viewer, and the "Balance Remaining" figure is automatically set to $0.00.

3. To add a payment, click on Add a new payment. Existing payments can be edited by clicking on them directly. Either action loads a payment detail form:



4. Select the payment type and enter details about the payment. The amount, vendor, pledge date, and 'Pledge fulfilled?' options are pre-filled but may be changed.

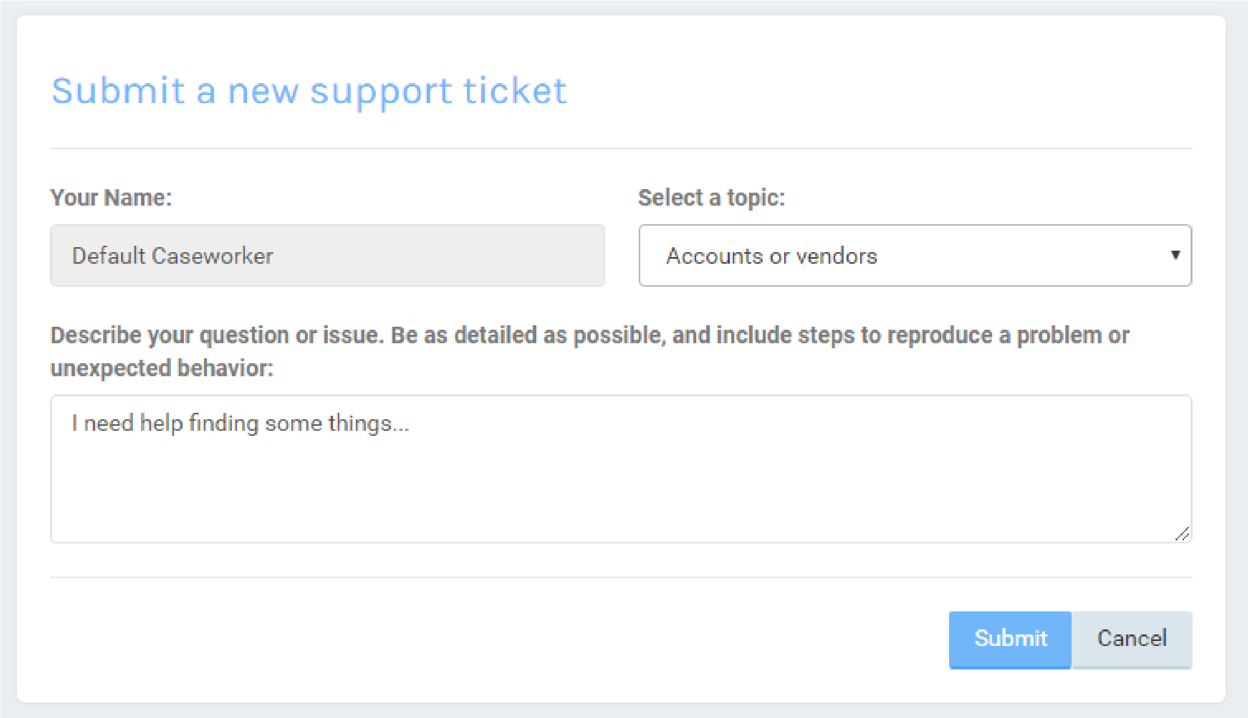
Note: Pledges will only be marked as complete when the 'Pledge fulfilled' option is set to 'Yes'!

Note: Twinning reimbursements are recorded as seperate payments. Add a payment in the full amount of the pledge, and then add a second payment for the amount of the reimbursement received from the partner agency.

A list of all payments may be viewed by clicking on Payments under the Pledges menu.

CHAPTER TWENTYTHREE

SUPPORT



Administry provides online support to answer questions that aren't provided here. To access the support portal:

1. *Log into Administry*.
2. At the bottom any page, click on 'Support'.
3. Once the support portal loads, add your question to the "Submit a new support ticket" area. Your name is automatically added and cannot be changed. Add as much detail as possible, then click 'Submit'.
4. Your ticket should appear under "My Recent Tickets". Click on a ticket to read it.

You should also receive an email confirmation of your support ticket. Administry Support normally responds to your support ticket within 24-48 hours.