



## System Documentation

FOR



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### Version Information

Number: 1.1    Revision Date: 3/23/2004 11:43:00 AM  
Number: 2.0    Revision Date: 3/7/2008 12:08:00 PM

## Table of Contents:

Background Information .....	4
Logging in to the Application .....	5
Changing Password .....	5
Retrieving a Forgotten Password .....	6
Creating a Mailing File per Center .....	7
Creating a Mail Merge with Microsoft Word and Mailing Files .....	8
Selecting a Single Client .....	12
Adding a Client .....	12
Searching for a Client .....	13
Generating a Mailing List per Client .....	13
Generating a Printable Information Report per Client .....	13
Adding/Editing a Client's Photo .....	14
Viewing/Adding/Editing a Residential Contact .....	15
Viewing/Adding/Editing a County Case or SRS Contact .....	17
Viewing/Adding/Editing a Guardian/Co-Guardian Contact .....	19
Viewing/Adding/Editing Other Contacts: Physician, Therapist, Employer, Family/Friend, Conservator .....	21
Viewing/Adding/Editing General Client Information (Income Information, Past Employment Info, etc.) .....	23
Viewing/Adding/Editing Program Information .....	24
Remove Client/Contact Relationship .....	25

## 1. Background Information

- a. User Privileges/Roles
  - i. Three Roles
    1. Admin: Privilege to add/edit/remove users, clients, and client info.
    2. Edit: Privilege to add/edit/remove clients and client info
    3. Read Only: Privilege to view clients and client info
  - ii. Roles are assigned by an Admin user.
- b. Understanding Tabs
  - i. Tabs act just as a folder tab in a filing cabinet. The tabs separate and organize data, so just as a folder labeled "Program Info" would contain information about the client's program, so too, does the tab labeled "Program Info."
- c. Understanding Links & Buttons
  - i. The application uses constant buttons and links throughout the application. Listed below are a few of them and their functions.
    1. *"Add New..." link*: When clicked this link allows users to add new information for the client (e.g. "Add New Physician", "Add New Referral").
    2. *"Edit..." link*: When clicked this link allows users to edit existing information for the client (e.g. "Edit Physician", "Edit Referral").
    3. *"Save & Return To..." link*: When clicked this link allows users to save the information on which they were working and return to the main page.
    4. *"Save & Continue to..." link*: When clicked this link allows users to save the information on which they were working and continue to the next set of client information.
    5. *"Save & Add Another..." link*: When clicked this link allows users to save the information on which they were working and add another piece of information of the same type (e.g. You have just entered all information for a new program and wish to add another so you would click the "Save & Add Another Program" link).
    6. *"Cancel..." link*: When clicked this link allows users to return to the main page *without* saving any information entered.
    7. *"Delete..." link*: When clicked this link allows users to remove information from the client (e.g. When editing a client's residential contact you wish to remove the client/contact relationship so you would click the "Delete this Client/Contact Relationship" link).
    8. *"Add" button*: When clicked this button allows users to add information for the client.
    9. *"Edit" button*: When clicked this button allows users to edit information for the client.
    10. *"View" button*: When clicked this button allows users view information for the client
  - ii. Required Fields
    1. Required fields are indicated with a star (\*) and must be filled in before saving the data.

## 2. Logging in to the System

- Open <https://www.mwsservices.net> in your web browser
- Enter your email address and password assigned to you by the administrator
- Hit the "Enter" key or click the "sign-in" button.

### Account Login

Email:

Password:

[sign-in >>](#)



## 3. Changing Password

- Log in to the application.
- Click on the "My Account" tab.

[Home](#) [My Account](#)



- Enter your current password you use to log in to the application in the text box labeled "Current Password."
- Enter your new password in the text box labeled "New Password."
- Enter your new password again in the text box labeled "Confirm New Password."
- Click on the "OK" button to change your password.
- The application will inform you that your password has been changed.
- Click the "Cancel" button if you do not want to change your password and would like to return to the Home page.

### Change Password

Current Password:



New Password:

Confirm New Password:

[OK](#) [Cancel](#)



#### 4. Retrieving a Forgotten Password

- a. Open <https://www.mwsservices.net> in your web browser
- b. Click on the "forgot password" link below the username, password, and "sign-in" button.  
  

- c. Enter your email address in the text box labeled "Email:" and click the "OK" button.

Email:

[OK](#) [Cancel](#)



- d. The application will automatically change the password for the account/email address you entered in the text box and will inform you that the password has been successfully changed and that you will receive an email with the new password shortly. If you do not receive an email or if you have problems with your new password contact the administrator of your system.

## 5. Creating a Mailing File per Center

- a. Log in to the application
- b. Under the "Mailing File" heading on the left side of your screen, click the center for which you wish to create a mailing file.

[Mailing File](#)

---

### Create Mail File for:

[Burnsville - DTH](#)

- c. Click on the check boxes next to each type of mailing file you wish to generate. For example, if you wish to create a mailing file of all clients at the center you selected you would simply check the box next to "All clients." You may check multiple boxes, too, so if you want to create a mailing file for all guardians and all family members you would simply check the boxes next to "All guardians" and "All family members."
- d. Click the "Generate Mail File" link

[Create Mail File: Burnsville - DTH](#)

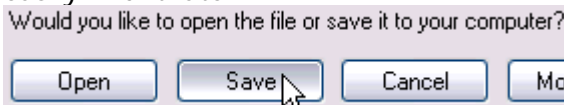
---

- All clients
- All residential providers
- All county case managers
- All state rehabilitation counselors (SRS)
- All guardians
- All family members

[Generate Mail File](#) [Cancel](#)

---

- e. A window will pop up asking you to open or save the mailing file you have generated. Click on the "Save" button to save the file to a location on your local computer where you can easily find it later.

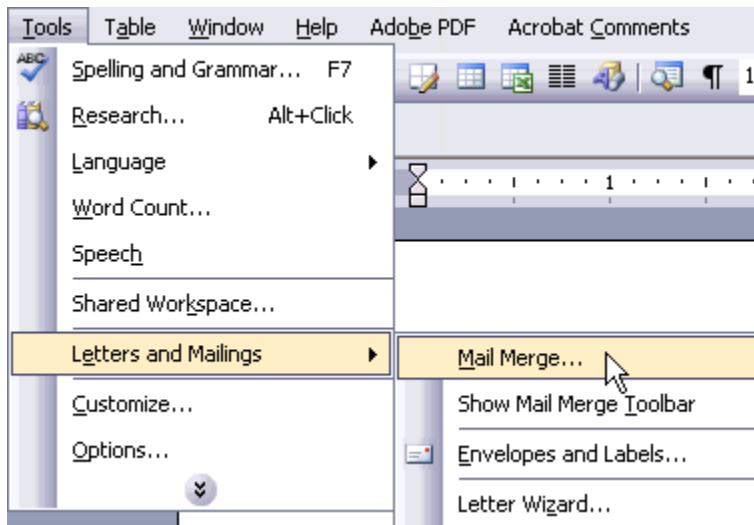


- f. Click the "Cancel" button to return to the Home page.
- g. See "Creating a Mail Merge with Microsoft Word and Mailing Files" if you wish to perform a mail merge with this newly generated mailing file.

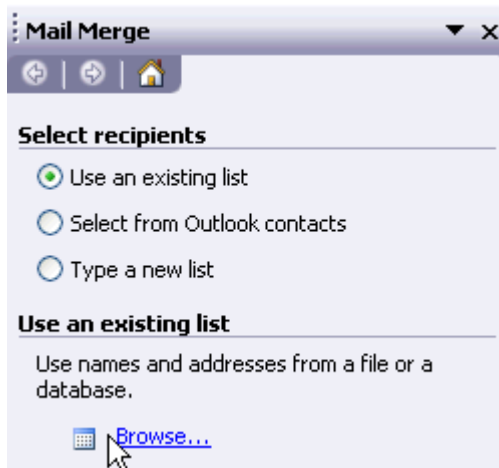
## 6. Creating a Mail Merge with Microsoft Word and Mailing Files

NOTE: The following steps for creating a mail merge document were created using Microsoft Office XP. If you are using another version of Microsoft Office the steps may be different but should follow the same basic process.

- a. Open the mail merge file (.doc file) you wish to merge with an excel spreadsheet in Microsoft Word or create a new mail merge file.
- b. Select "Tools" → "Letters and Mailings" → "Mail Merge"

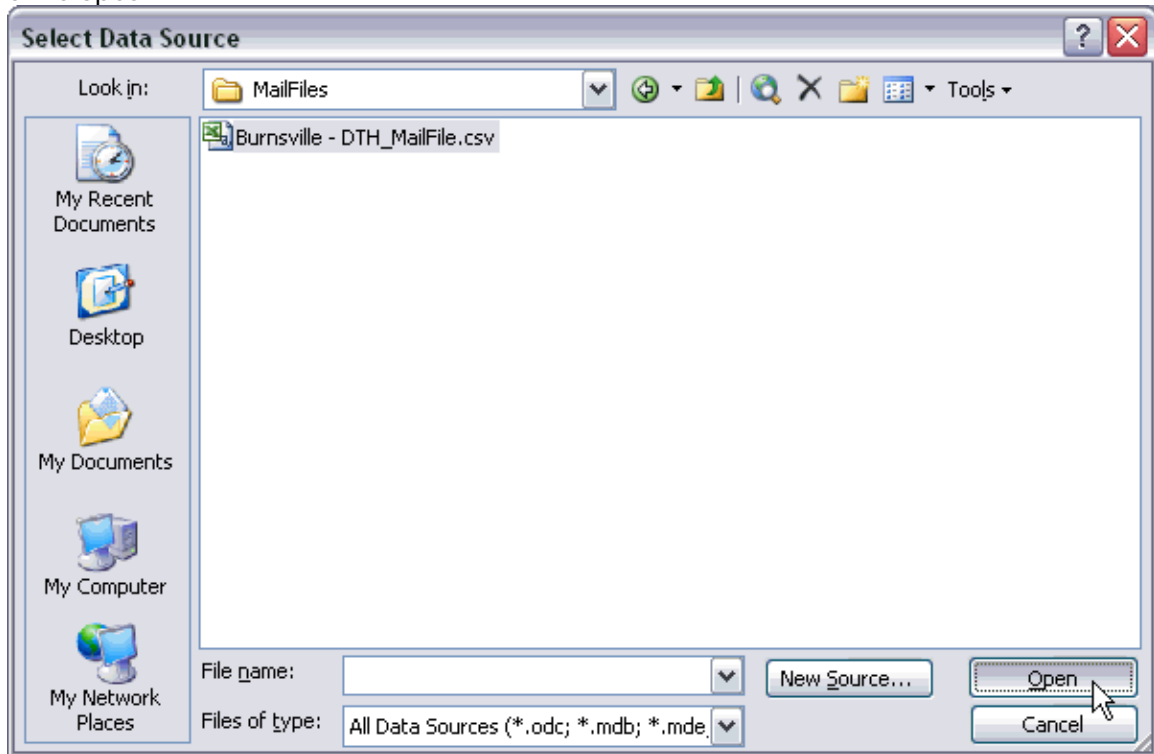


- c. In the pane that opens make sure "Use an existing list" is selected and click the "Browse..." button.

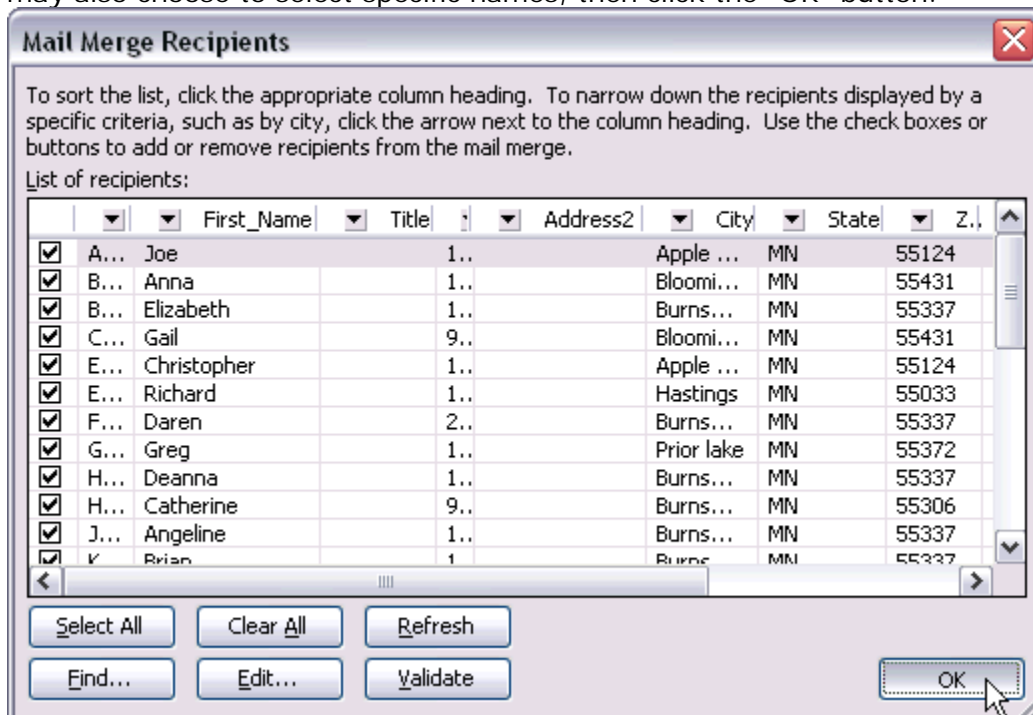




- d. Open the Microsoft Excel file that contains the names you wish to use for the letters or envelopes.



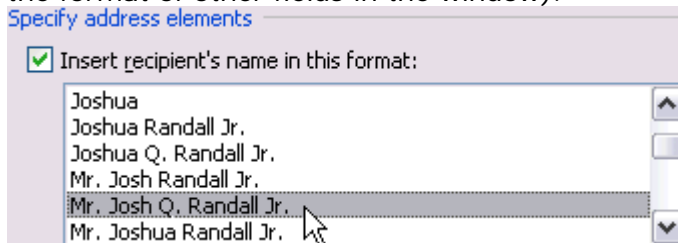
- e. A window will appear showing you all of the recipients found in the Microsoft Excel document. Make sure all the names are selected by clicking the "Select All" button or you may also choose to select specific names, then click the "OK" button.



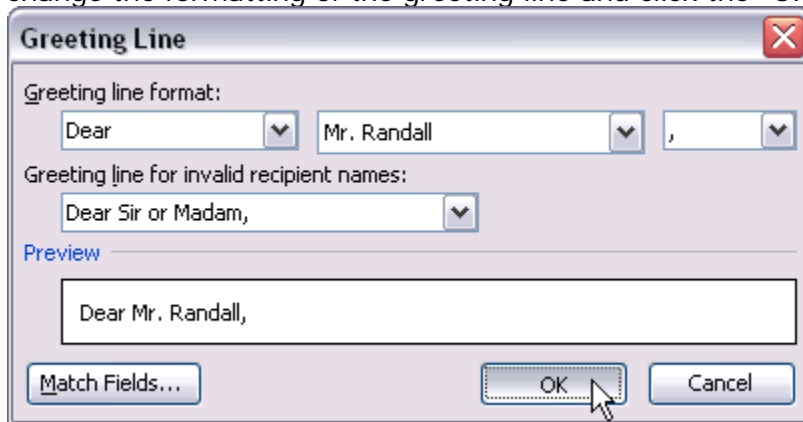
- f. Click the "Write your letter" link at the bottom of the pane.

➔ [Next: Write your letter](#)

- g. Click the "Address block..." link at the top of the pane and choose the format you wish the recipient's name to appear and click "OK". (For advanced users, you may choose to change the format of other fields in the window).



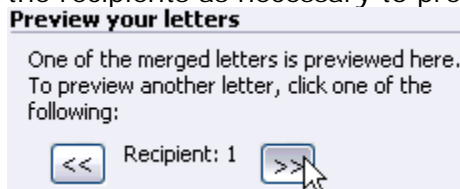
- h. Click the "Greeting line..." link at the top of the pane under the "Address block..." link to change the formatting of the greeting line and click the "OK" button when finished.



- i. Click the "Preview your letters" link.

➔ [Next: Preview your letters](#)

- j. Microsoft Word will automatically populate the fields with the information from the Microsoft Excel file. Click the "<<" and ">>" buttons at the top of the pane to scan through the all the recipients as necessary to preview the letters.



- k. Click the "Complete the Merge" link to complete the mail merge

➔ [Next: Complete the merge](#)

- l. Click the "Edit Individual Letters" link to view the letters Microsoft Word created.

 [Edit individual letters...](#)

- m. A window will appear asking you to choose which records to merge. Click "OK" to choose all of the records in the Excel sheet (For advanced users, you may choose to limit the records that will be merged).



- n. A new Microsoft Word document will open with the newly merged data from the Microsoft Excel sheet and the template mail merge document.

## 7. Selecting a Single Client

- a. Log in to the application.
- b. All of your clients will be listed alphabetically by their last name under the "My Clients" heading. The following fields are defined for each client:
  - i. Title: Client's title (e.g. Mr. Ms. Mrs., etc.)
  - ii. Full Name: Client's full name (including middle name, if supplied).
  - iii. Account Created On: Date and time the client's account was created
  - iv. Created By: User who created the client's account
  - v. Client Status: Status of the client (can be active or inactive)
- c. To select a single user simply click their name.

Title	Full Name	Account Created On	Created By	Client Status
	<a href="#">Marilyn A. Hen</a>	1/30/2004 12:00:00 AM	cstrong@mwsservices.net	active

- d. If the client you are looking for is not shown simply click the pages to the bottom-right of the client listing to page through the rest of your clients.

1 [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) ...

## 8. Adding a Client

- a. Log in to the application.
- b. Click on the "Add New Client" link located near the right side of your screen.
- c. Fill in the required and any desired fields.
- d. If you wish to save this client but not continue to enter any further information at this time, click on the "Save & Return to Home Page" link.

[Save & Return to Home Page](#)

- e. If you wish to save this client *and* continue to enter contact information for this client, click the "Save & Continue to Contact Info" link. See "Editing a Client's Contact or Demographic Information" for help on entering or editing client contact information.

[Save & Continue to Contact Info](#)

- f. If you wish to discard this information and not add this new client, click the "Cancel & Return to Home Page" link.

[Cancel & Return to Home Page](#)

## 9. Searching for a Client

- Log in to the application.
- Enter your search in the text box labeled "Admin Client Search" in the upper right-hand corner and click the "Search >>" button. (Hitting enter will not work – you must click the "Search >>" button.)

Client Search:  [search >>](#)

Client Search:  [search >>](#)

NOTE: You can only search on a client's last name. For example, if the client's last name is Smith then examples of correct search strings to find the client would be "S", "Sm", "Smi", "Smit", and "Smith". The search is not case sensitive.

- To clear your search results and display all clients click the "Clear Search Results" link.

[Clear Search Results](#)

Title	Full Name	Account Created On	Created By	Status	Change Status
	Greg Smith	1/30/2004 12:00:00 AM	cstrong@mwsservices.net	inactive	<a href="#">Activate/Inactivate this Client</a>
	Mary Kay Smith	1/30/2004 12:00:00 AM	cstrong@mwsservices.net	active	<a href="#">Activate/Inactivate this Client</a>

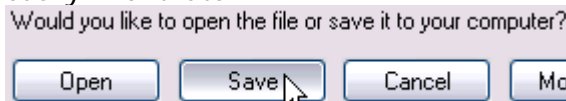
## 10. Generating a Mailing List per Client

- Log in to the application
- Select a client for which you wish to generate a mailing list (See "Selecting a Single Client")
- Click the "Generate Mailing List" link at the top of the screen below the "Printable Information Report" link.

[Printable Information Report](#)

[Generate Mailing List](#)

- A window will pop up asking you to open or save the mailing file you have generated. (This list will consist of all contacts who have requested to be on this client's mailing list). Click on the "Save" button to save the file to a location on your local computer where you can easily find it later.



- See "Creating a Mail Merge with Microsoft Word and Mailing Files" if you wish to perform a mail merge with this newly generated mailing file.

## 11. Generating a Printable Information Report per Client

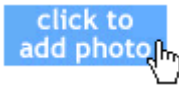
- Log in to the application.
- Select a client for which you wish to generate a printable information report (See "Selecting a Single Client")
- Click on the "Printable Information Report" link at the top of the screen above the "Generate Mailing List" link.

[Printable Information Report](#)

[Generate Mailing List](#)

## 12. Adding/Editing a Client's Photo

- Log in to the application
- Select a client for which you wish to add or edit a photo (See "Selecting a Single Client")
- If no photo has been added, click on the "click to add photo" button. If a photo has been added, click the pencil (edit) icon to the right of the existing photo to upload a new photo.

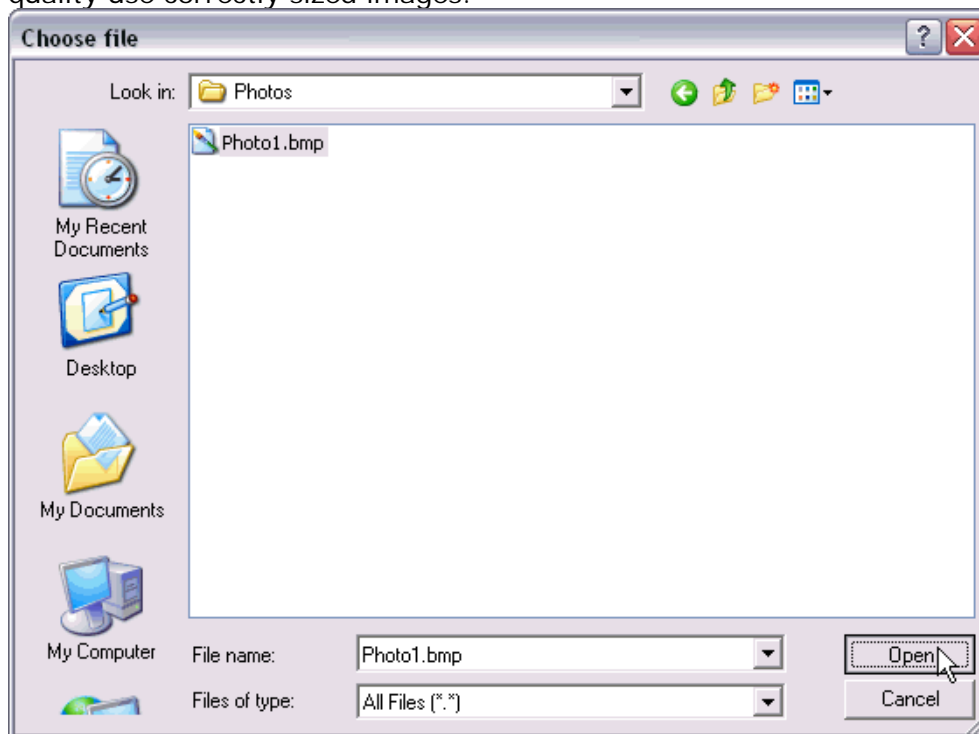


- Click the browse button.

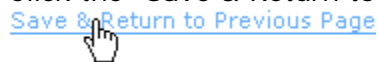


- A window will pop up. Find and select the new photo of the client and click the "Open" button.

NOTE: The photo must be 150 pixels x 150 pixels, less than 3MB in file size, and must only be in .jpg, .jpeg, .bmp, or .gif formats. If the image size is not 150 pixels x 150 pixels the image will be resized to this specification and may become distorted. For the best image quality use correctly sized images.

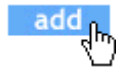


- Click the "Save & Return to Previous Page" to upload and save the new photo for this client.



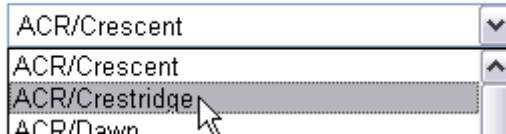
### 13. Viewing/Adding/Editing a Residential Contact (or Respite Contact)

- a. Log in to the application
- b. Select a client for which you wish to edit contact or demographic information (See "Selecting a Single Client").
- c. **To Add a Residential Contact (or Respite Contact)**
  - i. Click the "add" button in the box labeled "Residential Contact" (or "Respite Contact") on the right side of the screen.



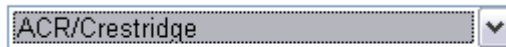
- ii. Select an agency from the drop down labeled "Select an Existing Agency:" to which this residential contact belongs. NOTE: If the agency you are looking for does not appear in the drop down please contact your administrator.

**Select an Existing Agency:**



- iii. Click the "Apply Change" link.

**Select an Existing Agency:**



[Apply Change >>](#)



- iv. The application will automatically populate the full address, the type of residence, the residential provider number, and phone, and fax numbers for the selected agency.
  - v. Fill in all remaining required and desired information.
  - vi. Click the "Save & Return to Previous Page" link.

[Save & Return to Previous Page](#)



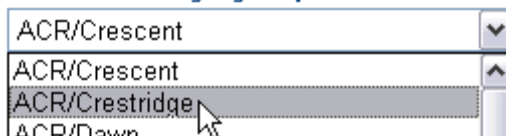
#### d. **To Edit a Residential Contact (or Respite Contact)**

- i. Click the "edit" button in the box labeled "Residential Contact" (or "Respite Contact") on the right side of the screen.



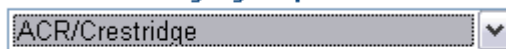
- ii. To change the corresponding agency information (address, phone/fax numbers, type of residence, and residential provider number), select an agency from the drop down labeled "Select an Existing Agency:".

**Select an Existing Agency:**



- iii. Click the "Apply Change" link.

**Select an Existing Agency:**



[Apply Change >>](#)



- iv. The application will automatically populate full address, the type of residence, the residential provider number, and phone, and fax numbers for the selected agency
  - v. Edit all remaining required and desired information.
  - vi. Click the "Save & Return to Previous Page" link.

[Save & Return to Previous Page](#)



#### e. **To View a Residential Contact (or Respite Contact)**

- i. Click the "view" button in the box labeled "Residential Contact" (or "Respite Contact") on the right side of the screen.



- ii. Click the "Close" link when finished viewing the information.





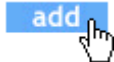
## 14. Viewing/Adding/Editing a County Case or SRS Contact

- a. Log in to the application
- b. Select a client for which you wish to edit contact or demographic information (See "Selecting a Single Client").

NOTE: If the contact you are looking for is not listed in the drop down menu mentioned below, click the "click here" link in the instructions below the drop down of contacts. This will clear the contact information and give further instructions on what steps to take to have the contact added to the drop down. After noting these instructions, click the "Save & Return to Previous Page" link.

### c. To Add a County Case Or SRS Contact

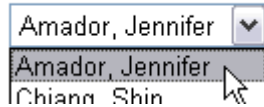
- i. Click the "add" button in the box labeled "County Case Contact" or "SRS Contact" depending on which type of contact you want to add.



- ii. Select an existing contact from the drop down labeled "Select an Existing Contact".  
NOTE: If the agency you are looking for does not appear in the drop down please contact your administrator.

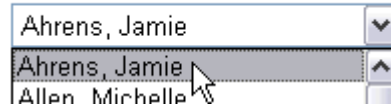
(SRS)

Select an Existing Contact:



(County Case)


Select an Existing Contact:



- iii. Click the "Apply Change" link.

(SRS)

Select an Existing Contact:



[Apply Change >>](#)

(County Case)

Select an Existing Contact:



[Apply Change >>](#)

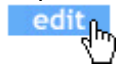
- iv. The application will automatically populate the contact information for this contact.
- v. Click the "Save & Return to Previous Page" link.

[Save & Return to Previous Page](#)



**d. To Edit a County Case Or SRS Contact**

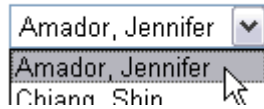
- i. Click the "edit" button in the box labeled "County Case Contact" or "SRS Contact" depending on which type of contact you want to edit.



- ii. Select an existing contact from the drop down labeled "Select an Existing Contact".

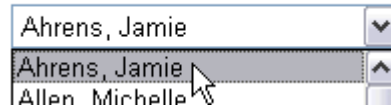
(SRS)

Select an Existing Contact:



(County Case)

Select an Existing Contact:



- iii. Click the "Apply Change" link.

(SRS)

Select an Existing Contact:



[Apply Change >>](#)



(County Case)

Select an Existing Contact:



[Apply Change >>](#)



- iv. The application will automatically populate the contact information for this contact.

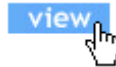
- v. Click the "Save & Return to Previous Page" link

[Save & Return to Previous Page](#)



**e. To View a County Case OR SRS Contact**







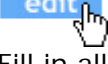
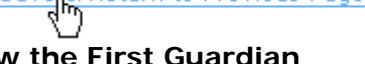




- i. Click the "view" button in the text box labeled "County Case Contact" or "SRS Contact" depending on which type of contact you want to view.



- ii. Click the "Close" link when finished viewing the information.



## 15. Viewing/Adding/Editing a Guardian/Co-Guardian Contact

- a. Log in to the application
- b. Select a client for which you wish to edit contact or demographic information (See "Selecting a Single Client").
- c. **To Add the First Guardian**
  - i. Click the "add" button in the box labeled "Co-Guardian 1:"  

  - ii. Fill in all required and desired information.
  - iii. Click the "Save & Return to Previous Page" to save the information entered and return to the previous page.  

- d. **To Add the Second Guardian**
  - i. Click the "add" button in the box labeled "Co-Guardian 2:"  

  - ii. Fill in all required and desired information.
  - iii. Click the "Save & Return to Previous Page" to save the information entered and return to the previous page.  

- e. **To Edit the First Guardian**
  - i. Click the "edit" button in the box labeled "Co-Guardian 1:"  

  - ii. Fill in all required and desired information.
  - iii. Click the "Save & Return to Previous Page" to save the information entered and return to the previous page.  

- f. **To Edit the Second Guardian**
  - i. Click the "edit" button in the box labeled "Co-Guardian 2:"  

  - ii. Fill in all required and desired information.
  - iii. Click the "Save & Return to Previous Page" to save the information entered and return to the previous page.  

- g. **To View the First Guardian**
  - i. Click the "view" button in the box labeled "Co-Guardian 1:"  

  - ii. Click the "Close" link when finished viewing the information.  

- h. **To View the Second Guardian**
  - i. Click the "view" button in the box labeled "Co-Guardian 2:"  

  - ii. Click the "Close" link when finished viewing the information.  


## 16. Viewing/Adding/Editing Other Contacts: Physician, Therapist, Employer, Family/Friend, Conservator

- a. Log in to the application.
- b. Select a client for which you wish to edit contact or demographic information (See "Selecting a Single Client").
- c. **To Add a Contact**
  - i. Click the link for the type of contact you wish to add (e.g. "Physician Contacts", "Referral Contacts").

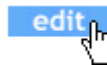


- ii. Click the "Add New..." link depending on which type of contact you want to add (e.g. "Add New Referral")  
[Add New Referral](#)
  - iii. Enter all required and desired information.
  - iv. Click the "Save & Return to..." link to save the information entered and return to the previous page (e.g. "Save & Return to Additional Contacts").  
[Save & Return to Additional Contacts](#)

### d. **To Edit a Contact**

- i. Click the link for the type of contact you wish to edit (e.g. "Physician Contacts", "Referral Contacts")



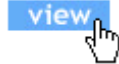
- ii. Click the "edit" button depending on which type of contact you want to edit.  

    - iii. Enter all required and desired information.
    - iv. Click the "Save & Return to..." link to save the information entered and return to the previous page (e.g. "Save & Return to Additional Contacts").  
[Save & Return to Additional Contacts](#)

e. **To View a Contact**

- i. Click the link for the type of contact you wish to view (e.g. "Physician Contacts", "Referral Contacts")





- ii. Click the "view" button depending on which type of contact you want to view.



- iii. Click the "Close" link when finished viewing the information.



## 17. Viewing/Adding/Editing Other Client Information: Contact, Demographic, Medical, Income, Past Employment, Transportation, Educational, and Background Information.





- a. Log in to the application.
- b. This type of client information is located in the following tabs:
  - i. Primary Info Tab
    1. Contact Information
    2. Demographic Information
  - ii. Program Info Tab
    1. Income Information
  - iii. Emergency/Medical Info Tab
    1. Medical Information
  - iv. Past Employment Info Tab
    1. Past Employment Information
  - v. General Info Tab
    1. Transportation Information
    2. Educational Information
    3. Background Information
- c. **To Edit this Client Information**
  - i. Click the tab under which the client information is found (see above)
  - ii. Click the "Edit..." link corresponding to the information you wish to edit (e.g. "Edit Transportation Information").  
[Edit Transportation Information](#)
  - iii. Enter all required and desired information.
  - iv. Click the "Save & Return..." link to save the information entered and return to the previous page (e.g. "Save & Return to General Info").  
[Save & Return to General Info](#)

## 18. Viewing/Adding/Editing Program Information





- a. Log in to the application.
- b. Select a client for which you wish to edit contact or demographic information (See "Selecting a Single Client").
- c. Click the "Program Info" tab.

 **Program Info**



### d. To Add a Program

- i. Click the "Add New Program" link  
 [Add New Program](#)
- ii. Fill in all required and desired information.
- iii. **To Save the Program Info and Return to the Program Info Page**, click the "Save & Return to Program Info" link.  
 [Save & Return to Program Info](#)
- iv. **To Save the Program Info and Continue to Enter Income Info**, click the "Save & Continue to Income Info" link.  
 [Save & Return to Additional Contacts](#)
- v. **To Save the Program Info and Add Another Program**, click the "Save and Add Another Program" link.  
 [Save & Add Another Program](#)

### e. To Edit a Program

- i. Click the "edit" button to the left of the Center/Program.  
 **edit**
- ii. Fill in all required and desired information.
- iii. **To Save the Program Info and Return to the Program Info Page**, click the "Save & Return to Program Info" link.  
 [Save & Return to Program Info](#)
- iv. **To Save the Program Info and Continue to Enter Income Info**, click the "Save & Continue to Income Info" link.  
 [Save & Return to Additional Contacts](#)
- v. **To Save the Program Info and Add Another Program**, click the "Save and Add Another Program" link.  
 [Save & Add Another Program](#)

### f. To View a Program

- i. Click the "view" button to the left of the Center/Program.  
 **view**
- ii. Click the "Close" button when finished viewing the information.  
 [Close](#)

## 19. Remove Client/Contact Relationship

- a. Log in to the application.
- b. Select a client for which you wish to edit contact or demographic information (See "Selecting a Single Client").
- c. Select a contact (e.g. Residential, Guardian, County Case, etc.) to edit by clicking the "edit" button associated with the contact.



- d. Click the "Delete this Client/Contact Relationship" to delete the client/contact relationship.

[Delete this Client/Contact Relationship](#)