



# Interaction Quick Reference Guide

## Step 1: Locate or Enter in Community Member

Enter the community member's name and click on SEARCH. If the community member's name is displayed, select PROFILE and start the Interaction.

Community Search

Community members who have interacted with your organization all in one place. You can search and add new community members.

Community Members

SEARCH ADD

First Name	Last Name	DOB (MM/DD/YYYY)	Email	Mobile Phone Number	Home Phone Number	Intake Date	Actions
Alicia	Jones			7327680663		01/08/2024	PROFILE
james	jones	08/25/1979		3734567899		09/22/2023	PROFILE
Jones	Whysk	10/23/1985			7322341623	01/03/2024	PROFILE

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## Step 2: Start Interaction

Once you click SAVE, the Interaction box will appear. Click on the globe icon, and choose Organization from the drop-down menu.

Interaction

Interaction Type

Interaction

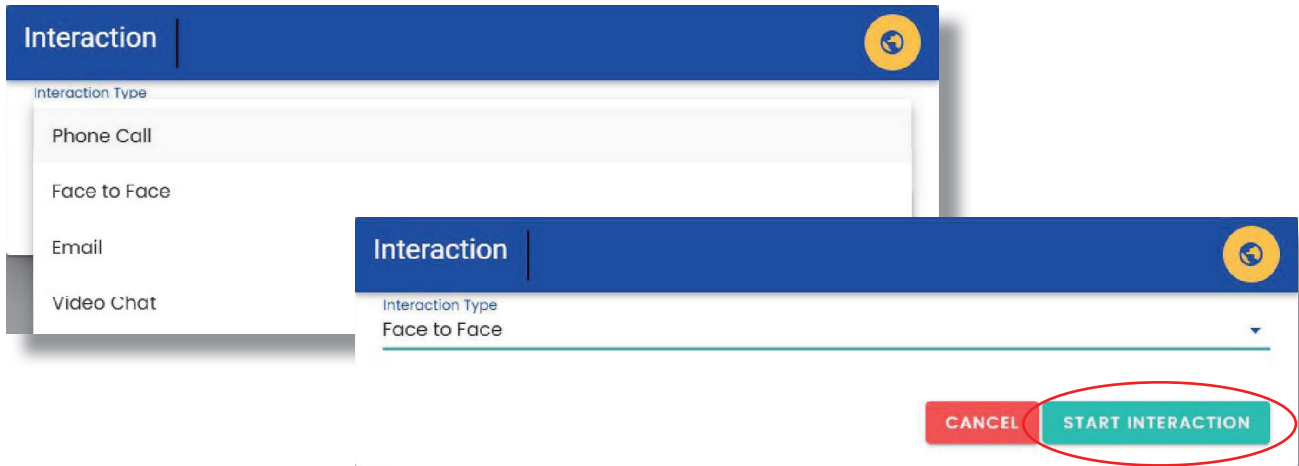
Interaction Type

- Global
- Organization
- Program
- Personal

CANCEL



Use the drop-down menu to select the type of interaction, then click on START INTERACTION.



## Step 3: Consent

The CONSENT window will appear. If not already completed, provide the necessary information. Consent forms can be customized by your organization administrator based on your organization's requirements.

**Michael Jones** 44 yrs Contact (555) 222-3333 (Mobile)

**CONSENT** | DASHBOARD | CONTACT | ADDITIONAL | FORMS | DOCUMENTS | HMIS

You are entering a shelter-based home we collect our information on the allco platform. Do you give consent to share your information.

yes  
 no

What are your needs today?  
Shelter

Gender  
Male

Who are you calling on behalf today?  
Self

Are you currently enrolled in a recovery/withdrawal program?  
No

SAVE



# Step 4: Community Member Engagement

The Dashboard provides the tools necessary to engage with the community member and begin to provide them with required services such as Needs, Referrals, and Program Enrollments.

**Michael Jones**  
44 yrs - M

**Contact**  
(555) 222-3333 (Mobile)

CONSENT **DASHBOARD** CONTACT ADDITIONAL FORMS DOCUMENTS HMIS

**Needs** ADD VIEW HISTORICAL

**Referrals** ADD INTERNAL ADD

Referring Organization	Referred to Organization	Status	Date Created	Actions
No Referrals				

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**Program Enrollments** ADD

Program Name	Status	Date Created	Actions
No Program Enrollments			

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**Activity** ADD NOTE

INTERACTIONS NOTES

No recorded interactions