ATLAS Training Guide

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ATLAS Training Guide

What is ATLAS

- ATLAS is a centralized data base
- Ensuring user flexibility, as well as, accuracy of client and agency reporting information
- Provides an efficient registration system for clients, and localized data to assist staff with improved coordination when providing service provisions
- Allows tracking client activities across multiple distribution channels
- An extensive Client Find/Merge system that not only prevents record duplication, but accurately merges found duplicates due to misinformation, misspelling, or name changes

Atlas Naming Standards Name:

Names can be typed in lower case. When the record is saved, the format will auto correct to legal name (John Doe) or (Jane Andy Doe).

Add Jr or Sr notations after the clients last name (John Doe Jr) or (John Doe Sr).

Address: No punctuations or special characters (2831 N 31st Ave) or (Po Box 3528).

Abbreviations:

Street = St	Route = Rte	North = N	First = 1st
Avenue = Ave	Alley = Aly	South = S	Second = 2nd
Road = Rd	Drive = Dr	East = E	Third = 3rd
Lane = Ln	Court = Ct	West = W	Forth = 4th
Way = Way	Circle = Cir	Northwest = Nw	Southwest = Sw
Terrace = Ter	Suite = Ste	Northeast = Ne	Southeast = Se
Boulevard = Blvd	Building = Bldg	Parkway = Pkwy	Highway = Hwy
Apartment = Apt	Space or Lot = Sp	Unit = Apt	

Post Office Box = Po Box

Additional Help

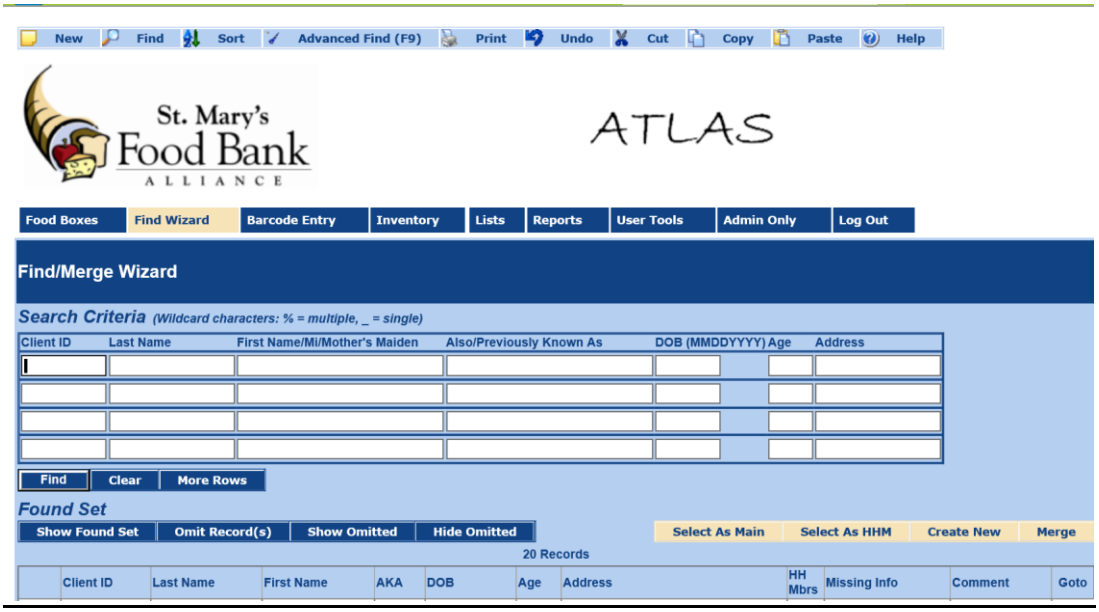
1. A help ticket can be created by selecting
2. This training guide can also be accessed by selecting "Help".

ATLAS

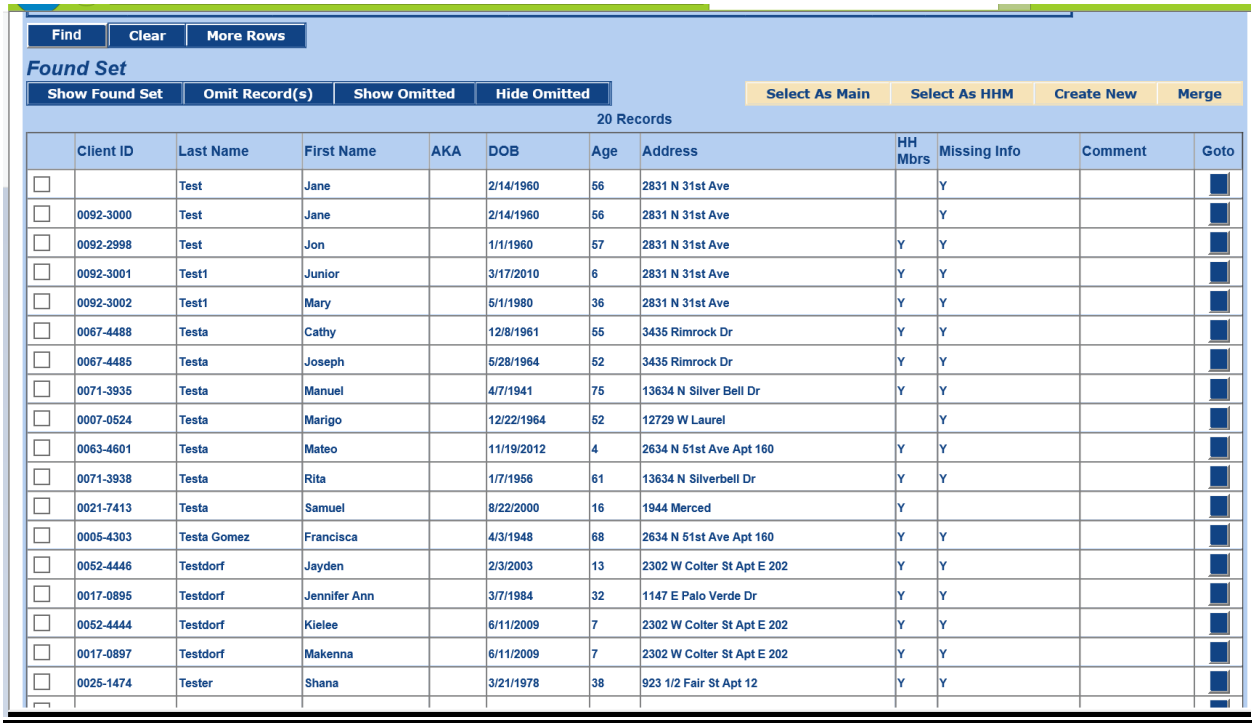
ATLAS Screen Map

Visuals of ATLAS and how it is broken down by section from first to last.

Find Wizard = where you do your search client verification



Found Set = Where to find existing clients



Client ID	Last Name	First Name	AKA	DOB	Age	Address	HH Mbrs	Missing Info	Comment	Goto
	Test	Jane		2/14/1960	56	2831 N 31st Ave		Y		
0092-3000	Test	Jane		2/14/1960	56	2831 N 31st Ave		Y		
0092-2998	Test	Jon		1/1/1960	57	2831 N 31st Ave	Y	Y		
0092-3001	Test1	Junior		3/17/2010	6	2831 N 31st Ave	Y	Y		
0092-3002	Test1	Mary		5/1/1980	36	2831 N 31st Ave	Y	Y		
0067-4488	Testa	Cathy		12/8/1961	55	3435 Rimrock Dr	Y	Y		
0067-4485	Testa	Joseph		5/28/1964	52	3435 Rimrock Dr	Y	Y		
0071-3935	Testa	Manuel		4/7/1941	75	13634 N Silver Bell Dr	Y	Y		
0007-0524	Testa	Marigo		12/22/1964	52	12729 W Laurel		Y		
0063-4601	Testa	Mateo		11/19/2012	4	2634 N 51st Ave Apt 160	Y	Y		
0071-3938	Testa	Rita		1/7/1956	61	13634 N Silverbell Dr	Y	Y		
0021-7413	Testa	Samuel		8/22/2000	16	1944 Merced	Y			
0005-4303	Testa Gomez	Francisca		4/3/1948	68	2634 N 51st Ave Apt 160	Y	Y		
0052-4446	Testdorf	Jayden		2/3/2003	13	2302 W Colter St Apt E 202	Y	Y		
0017-0895	Testdorf	Jennifer Ann		3/7/1984	32	1147 E Palo Verde Dr	Y	Y		
0052-4444	Testdorf	Kielee		6/11/2009	7	2302 W Colter St Apt E 202	Y	Y		
0017-0897	Testdorf	Makenna		6/11/2009	7	2302 W Colter St Apt E 202	Y	Y		
0025-1474	Tester	Shana		3/21/1978	38	923 1/2 Fair St Apt 12	Y	Y		

Client Information = D.O.B, Name, Adress, Race, Ethnicity, Marital Status, etc.

Client ID | Last Name: Test | First Name/Mi/Mother's Maiden: Jane | DOB (MMDDYYYY): 02/14/1960 | No DOB? | Age: 56 | Gender: F

Zip Code: 85009 | Homeless

Address: 2831 N 31st Ave

City / State: Phoenix | AZ

Phone

Also/Previously Known As

Case Manager Name

Race/Ethnicity

Single Race: Asian

Second Race

Ethincity

Marital Status

- Single Parent
- Single (never married)
- Married
- Separated
- Divorced
- Widowed
- Unknown

Employment

- Employed
- Unemployed
- Retired
- Student
- N/A

Misc

- Parent w/at least one child under 6
- Disabled
- Pregnant
- Veteran
- Food Stamps
- WIC
- Single Female Head of Household
- Deceased

Due Date (MMDDYYYY):

Income: 0.00 | Daily | Weekly | Bi-Weekly | Monthly | Yearly | Unknown

Household Members = Add, Unrelate, Verify

Income: 900.00 | Daily | Weekly | Bi-Weekly | Monthly | Yearly | Unknown

Annual Income: $0.00 | Household Annual Income $0.00

Family Size: 4

% of FPL

Household Members

New | Update | Merge

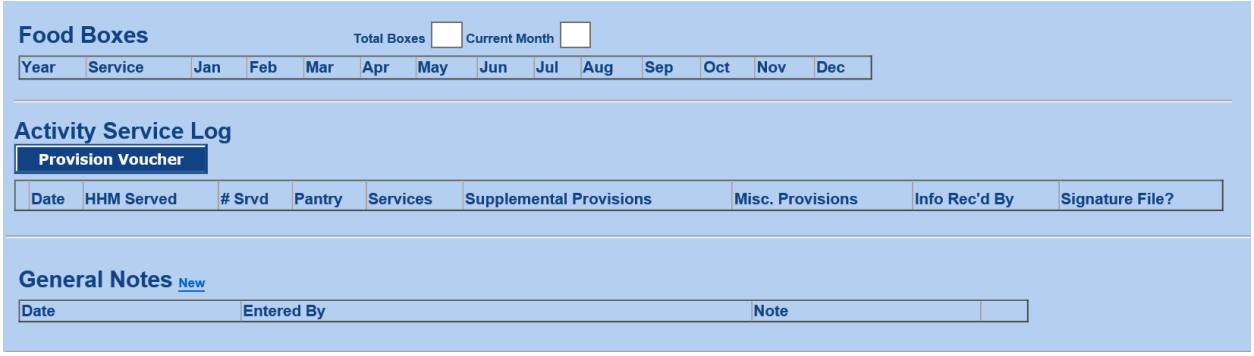
		ID	Last Name	First Name	DOB	Age	M/F	Family Relation	Date Added	Other Boxes Total	Other Boxes Current Month	Missing Info	Update	UnRelate	Goto
Edit	☐	0092-3002	Test1	Mary	6/1/1980	37	F	Adult Child	1/21/2017	0		Y			
Edit	☐	0092-3001	Test1	Junior	3/17/2010	7	M	Grandchild	1/21/2017	0		Y			
Edit	☐	0092-3000	Test	Jane	2/14/1960	57	F	Spouse	1/21/2017	0		Y			

Food Boxes

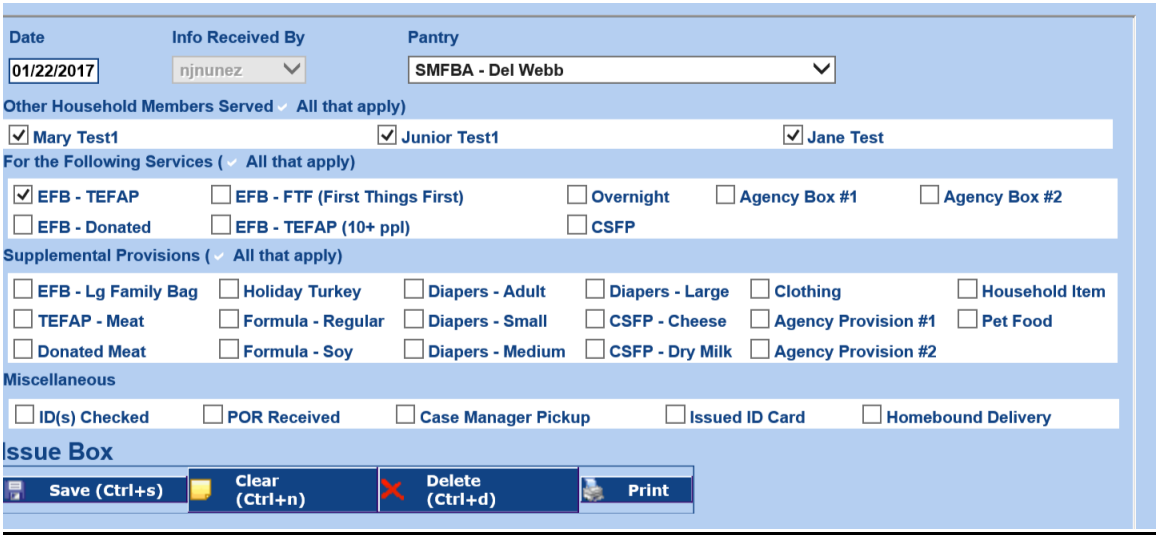
Total Boxes | Current Month

Year	Service	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

Activity log = last services received



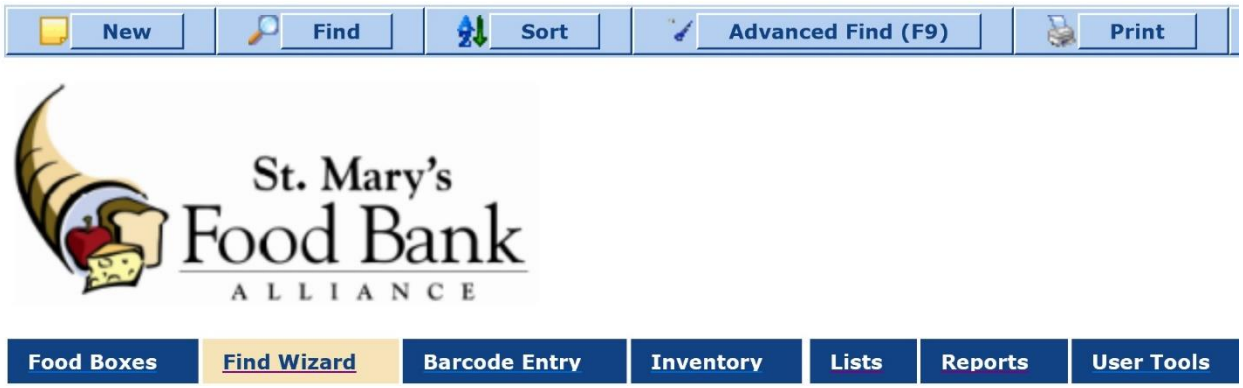
Services = Selection of services and provisions



Set Browser Compatibility Mode

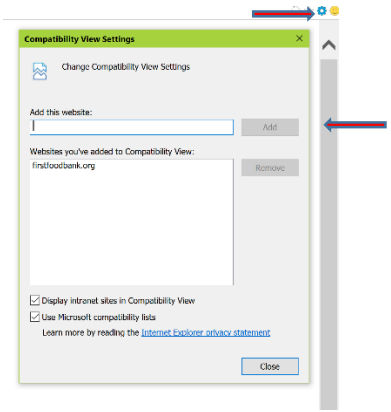
If a browser is not compatible with Atlas, buttons and functions may not work properly. It is also common for the screen to look different than expected. Internet Explorer is currently the only browser that works with Atlas.

- Some versions of internet explorer are not compatible with Atlas. When this occurs, the on-screen information may look distorted or be difficult to maneuver.

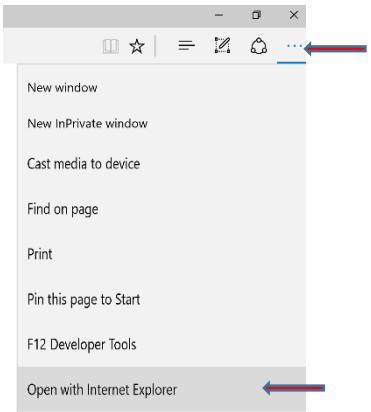


- Internet Explorer can be set to compatibility mode one of two ways.
  1) In the address bar select the paper icon.
  2) From Internet Explorer select Tools → Compatibility View Settings →Add Website Address firstfoodbank.org
  3) If you are using Windows 10 default browser Microsoft Edge
  4) Consult Internet Explorer help if neither option is available.

Option #2

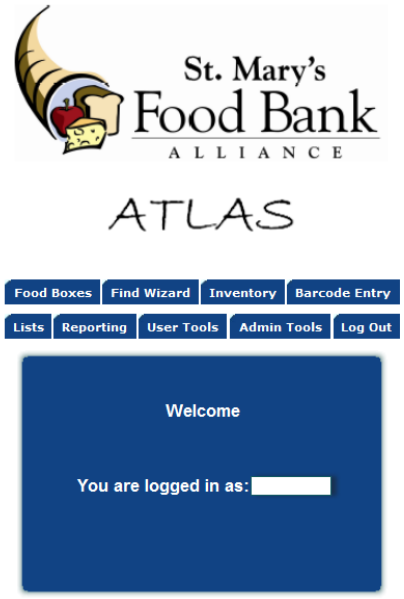


Option #3



How to Open ATLAS

- Atlas requires a computer with internet access and Windows Internet Explorer.
- Internet Explorer must be in compatibility mode for ATLAS to work correctly.
- The internet Address for ATLAS is HTTP://atlas.firstfoodbank.org/
  (Once you get to the landing page right click and add a shortcut to your desktop)
- Enter assigned user name and password at login page. (provided by SMFBA)
- ATLAS will automatically log accounts out after a designated period of inactivity.



- If there are any user messages they will immediately pop up after log in

Steps to Search for Existing Records

Properly searching for existing records in ATLAS helps avoid costly duplicates.
Begin with Selecting the “Find Wizard" navigation tab to search for an existing client record.

Under “Find Wizard” you must use these 3 steps to find a match prior to creating a new client ID.

1. Search by date of birth 1st.

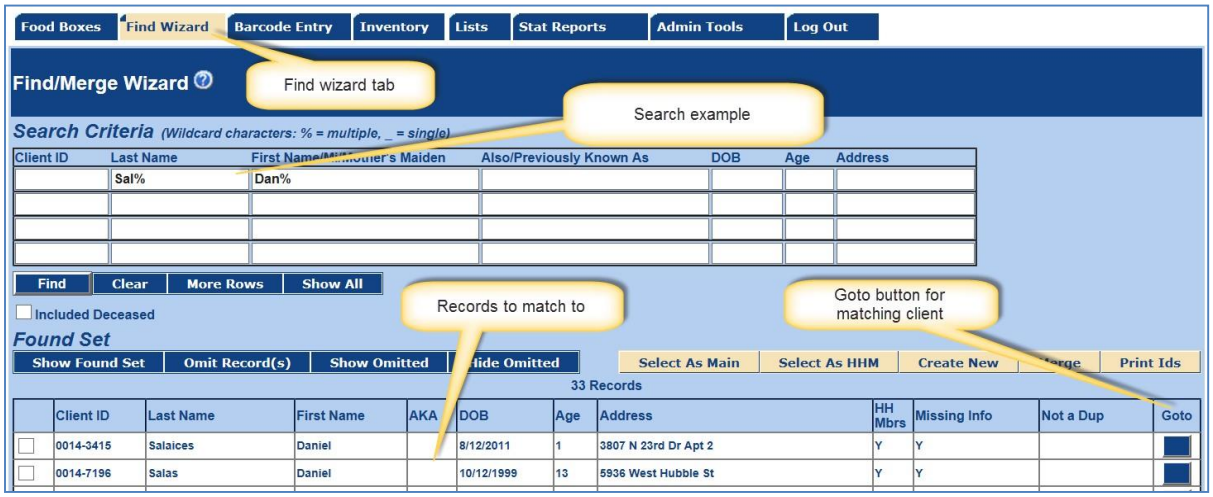
- Example: MMDDYYYY (Do not include slashes, ATLAS will automatically include them when the enter or tab function has been pressed
- Review “Found Set” results for a match.
- If match found select "Goto" and update record.
- If no match is found continue to step 2

2. Search by first 3 letters of last and first 3 letters of first name.

- Example: For Dan Salvador enter sal dan (you do not need to capitalize, or use punctuations ATLAS will do this for you)
- Select enter or find button (% will appear after text).
- Review “Found Set” results for a match.
- If match is found select "Goto" and update record.
- If no match is found continue to step 3

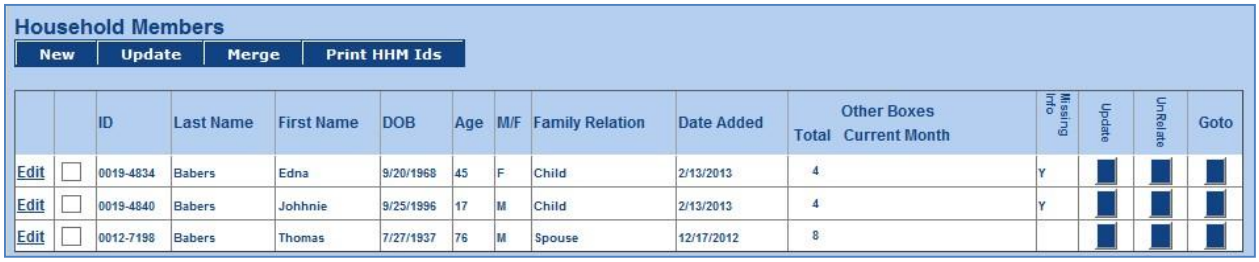
3. Search by partial address.

- Example: 1234 E Ma
- Select enter or find button (% will appear after text).
- Review “Found Set” results for a match.
- If match found select "Goto" and update record



Update Existing Client

- From a client's information card personal information can be changed and saved as needed.
- After Client Record is found and opened it should be reviewed for any changes in personal information.
- Update fields as needed. Save record when changes are complete. Save
- If address changes are made to the client select "Update" in the household member section to update all the household members with the same address.
- Review/update household member information as needed by selecting "Edit" for the correct client.
- Add new household members by selecting "New".



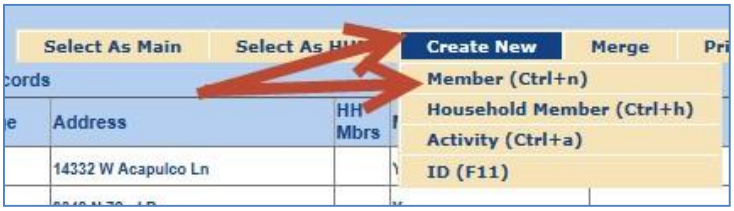
Mark Client as Deceased

- Open the client ID that needs to be changed.
- Check the deceased box under misc.
- If there are family members client will need to be unrelated.
- After being marked as deceased client can be found in the deceased list (see Lists).

Create a New Client Record

Enter a new client <u>only</u> after failing three attempts to find a match (see Searching Existing Records).

1. Select "Create New" and "Member" to open client id screen (quick key ctrl+n).



2. With acceptable ID and "proof of residency" or client referral form, the following fields need to be completed using the correct naming standards.

Fields to complete:

- Legal name, last and first.
- Date of Birth (Age will auto-populate).
- Gender.
- Zip code, (City and State will auto-populate).
- Home street address.
- Select appropriate single race and add second race if needed.
- Select ethnicity if needed. (If ethnicity is identified as Hispanic you must click Caucasian under Race to be able to enter Hispanic under ethnicity)
- Add case member name if needed.
- Enter remaining demographics as needed.
- Enter income and payment frequency. (Atlas will calculate annual amount). No proof is required and they do not have to disclose this information.

Select Save at the top of the page

- Any potential duplicates will be listed at the top of the form.
- Select "Goto", to abandon the new record and select the existing record.
- Select save, to issue a new client ID and continue with the new record.

Add New Household Member

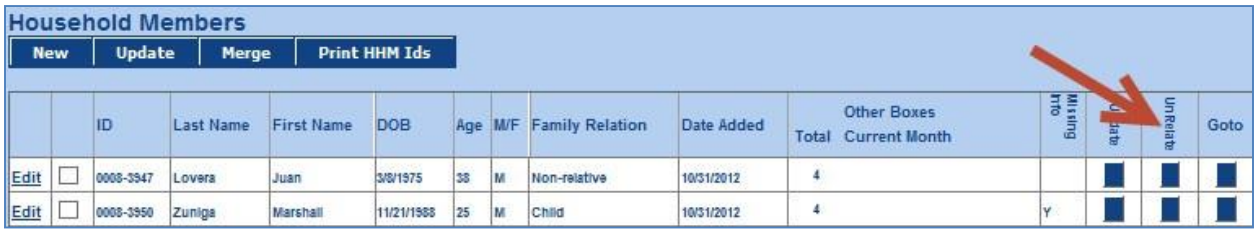
When in the client record select "New" then "Household Member" (quick key ctrl+h).

1. A new page opens which is similar to the client screen.
2. Select "Find" and check for duplicate records (quick key F3).

3. Last name and address is populated from previous page, so make sure you are inputting the appropriate information.
4. Complete remaining fields consistent with creating a new record.
5. Save when completed.

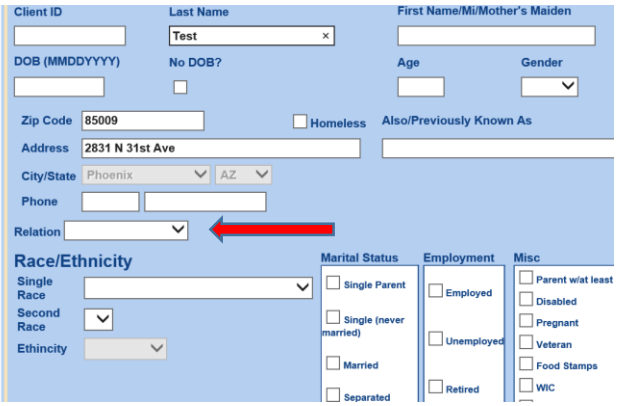
Remove / Unrelate Household Member

- To remove a household member from a client, select the “Unrelate" option in household member section.
- Best practice is to add the new address to the client that has been unrelated.



Add Existing ID Number/Client as a Household Member

1. Open client record the household member will be related to.
2. Select "New" household member (Ctrl+h).
3. From household member screen select "Find" option.
4. A search box will open to support finding the existing client record that needs to be related. (include appropriate information)
5. When identified choose "Select" next to the appropriate client record and add relationship.

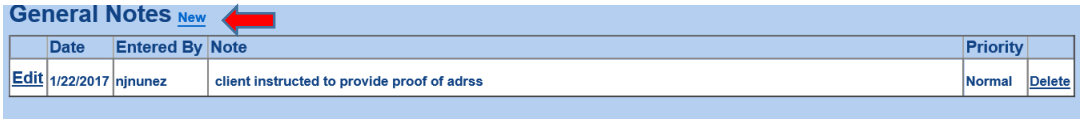


Adding Comments to a Client

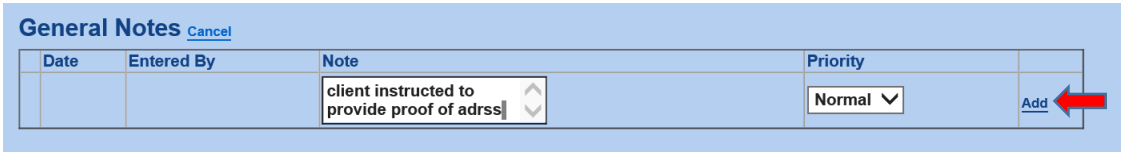
- Brief notes can be added to the client record in the comment field under the address.
- Different versions of the client's name can be added to the "also known as" field.
- A case manager's name and ID can be added to the "case manager" field.
- More detailed comments can be added to the general notes section at the bottom of the client record. After saving a note is made to the right of the screen showing a note is available.

Add/Read general notes.

- Click New



- Type note and click Add



Verify Last Activity for a Client

After opening a client's information card, activities are available for review. White indicates services were issued to the client, and gray indicates services were issued to a household member.

- By default, only the most recent five activities will be visible when the client record is opened.
- Review recent service activity for compliance issues based on Agency standard.

Activity Service Log

Provision Voucher | Print

		Date	HHM Served	# Srvd	Pantry	Services	Supplemental Provisions	Misc. Provisions	Info Rec'd By
Edit	☐	6/25/2014	Brenda Begay Breanna Adams	5	Cultural Cup Food Bank	EFB - TEFAP	Case Mgr Pickup Agency Provision #2		ccfb1
Edit	☐	5/23/2014	Xavier Mendez Vanessa Mendez	3	SMFBA - Knight Center	EFB - TEFAP			term6
	☐	3/28/2014	Xavier Mendez Vanessa Mendez	3	SMFBA - Knight Center	EFB - TEFAP			term7
Edit	☐	12/4/2013		1	SMFBA - Knight Center	EFB - TEFAP Overnight			term10
Edit	☐	10/25/2013		1	SMFBA - Knight Center	EFB - TEFAP			term9

Edit Existing Activity

- If you make a mistake with service distribution click edit, make appropriate changes, then click save

Activity Service Log

Provision Voucher

		Date	HHM Served	# Srvd	Pantry	Services	Supplemental Provisions	Misc. Provisions	Info Rec'd By	Signature File?
Edit	☐	1/22/2017	Jon Test Junior Test1	4	SMFBA - Del Webb				njnunez	

Selection of Services and Provisions

- Other household members served (Check all that apply)
- For the following services, be specific as to what is provided and know your pantry compliances.
- Supplemental provisions (Check all that apply)
- Miscellaneous (check all that apply)
- press **save**
- Scroll up to verify activity was submitted correctly in the activity section.
- Return to "Find Wizard" for new client seach/intake

Date: 01/22/2017 | Info Received By: njnunez | Pantry: SMFBA - Del Webb

Other Household Members Served (✓ All that apply)

☑ Mary Test1 ☑ Junior Test1 ☑ Jane Test

For the Following Services (✓ All that apply)

☑ EFB - TEFAP ☐ EFB - FTF (First Things First) ☐ Overnight ☐ Agency Box #1 ☐ Agency Box #2
☐ EFB - Donated ☐ EFB - TEFAP (10+ ppl) ☐ CSFP

Supplemental Provisions (✓ All that apply)

☐ EFB - Lg Family Bag ☐ Holiday Turkey ☐ Diapers - Adult ☐ Diapers - Large ☐ Clothing ☐ Household Item
☐ TEFAP - Meat ☐ Formula - Regular ☐ Diapers - Small ☐ CSFP - Cheese ☐ Agency Provision #1 ☐ Pet Food
☐ Donated Meat ☐ Formula - Soy ☐ Diapers - Medium ☐ CSFP - Dry Milk ☐ Agency Provision #2

Miscellaneous

☐ ID(s) Checked ☐ POR Received ☐ Case Manager Pickup ☐ Issued ID Card ☐ Homebound Delivery

Issue Box

Save (Ctrl+s) | Clear (Ctrl+n) | Delete (Ctrl+d) | Print