Emergency Assistance
User Guide

Contents

About MAACLink

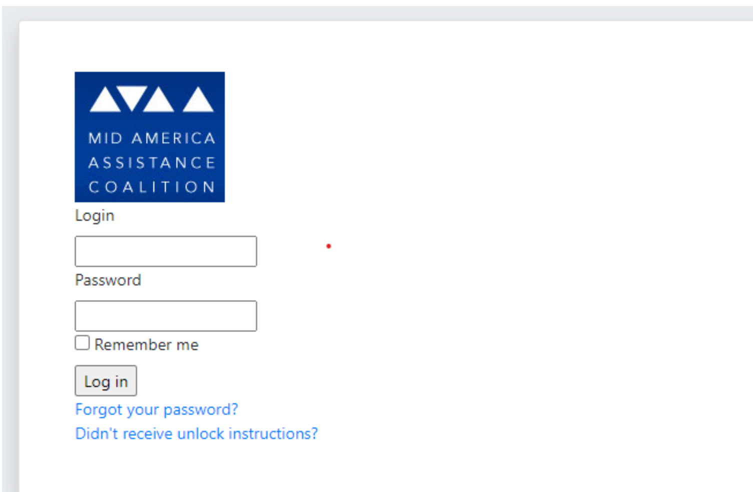
MAACLink is a social service software platform used by nonprofit and social service agencies for client tracking, resource monitoring and community data sharing, among other reasons. This online software system is easily integrated to the specific needs of agencies, their requirements and unique services.

This guide will walk users through the Emergency Assistance (EA) functionality of MAACLink.

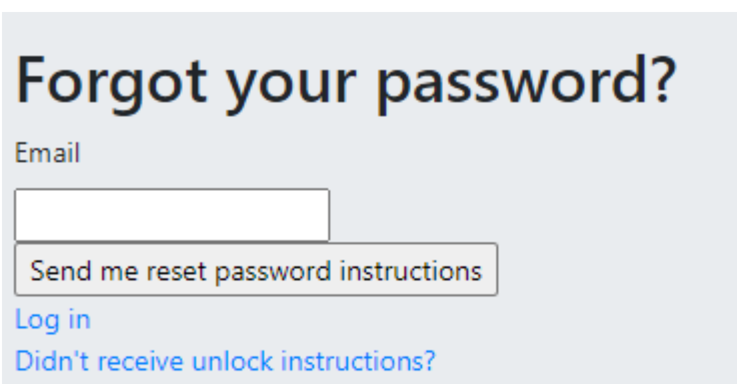
Log In

Log In to MAACLink, navigate to the URL provided by your MAACLink Administrator.

Type in the **user name** and **password** provided and click the **Log In** button.



If you cannot remember your Password, click the **Forgot your Password?** link to receive password reset instructions to the email address on file for your account.



If you need to update your address on file, contact your MAACLink Administrator.

Once you are signed in, across the top of the screen there are different tabs (**Home**, **Case Manager** etc.) depending on your account set up.

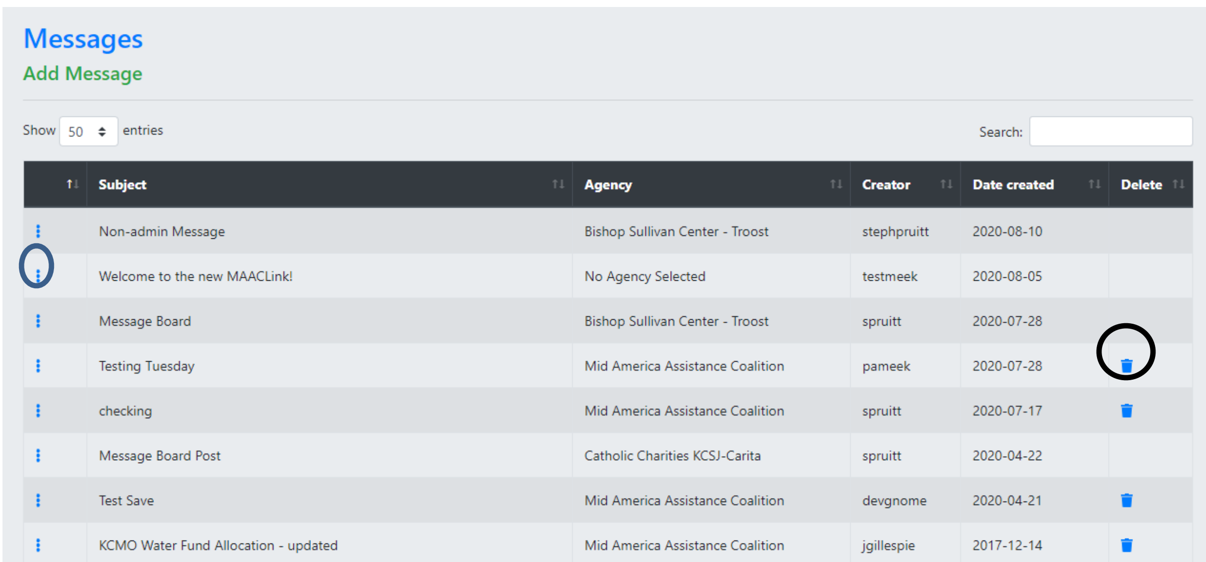
Each tab will display different **Menu** options on the left that allow navigation through MAACLink.

Message Board

Upon login, the **Home** tab will automatically display the **Message Board**. The Message Board is a place where Agencies post messages to communicate with ~~other~~ each other about new programs, funds, operating hours, and other agency-related information.

To **View** a **Message**, click the blue ellipses icon to the left of the Message.

If your Agency created the Message, **Delete** using the blue trashcan icon on the right when the Message is no longer relevant.



Messages

Add Message

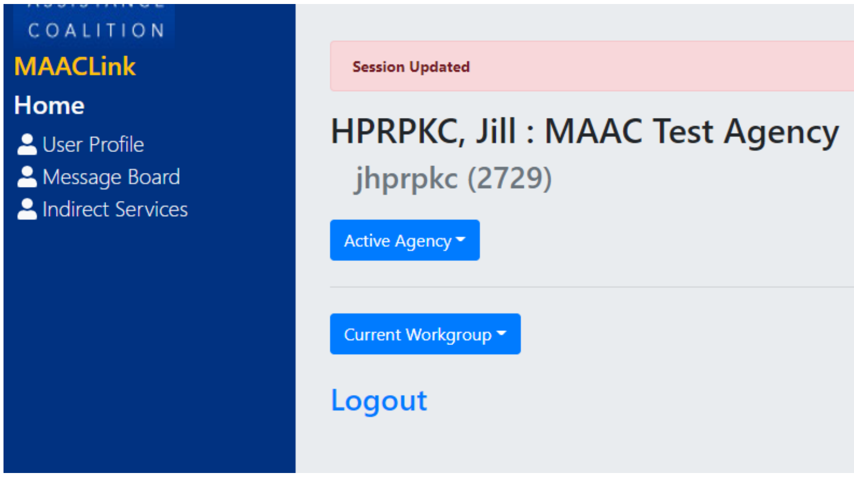
Show 50 entries

Search:

	Subject	Agency	Creator	Date created	Delete
	Non-admin Message	Bishop Sullivan Center - Troost	stephpruitt	2020-08-10	
	Welcome to the new MAACLink!	No Agency Selected	testmeek	2020-08-05	
	Message Board	Bishop Sullivan Center - Troost	spruitt	2020-07-28	
	Testing Tuesday	Mid America Assistance Coalition	pameek	2020-07-28	
	checking	Mid America Assistance Coalition	spruitt	2020-07-17	
	Message Board Post	Catholic Charities KCSJ-Carita	spruitt	2020-04-22	
	Test Save	Mid America Assistance Coalition	devgnome	2020-04-21	
	KCMO Water Fund Allocation - updated	Mid America Assistance Coalition	jgillespie	2017-12-14	

To **Add** a new Message, click the **Add Message** button above the Messages. Complete the **Subject** and **Message** fields, then click **Finish**.

User Profile/Logout



The **User Profile** will display your name and the name of the Agency you are currently logged into. Always check the **User Profile** before moving forward with data entry if you access multiple sites in MAACLink. All information entered will be logged under the Agency name displayed.

To update your Agency, click the “Active Agency” drop down and select the appropriate agency name.

User Profile is also where you will need to log out at the end of your session. Simply closing your browser window may not end your MAACLink session. When you are ready, navigate to the **User Profile** menu option on the **Home** tab, then click **Logout**.

Case Manager – Recent Clients

When you are ready to work with your Client in MAACLink, click the **Case Manager** tab.

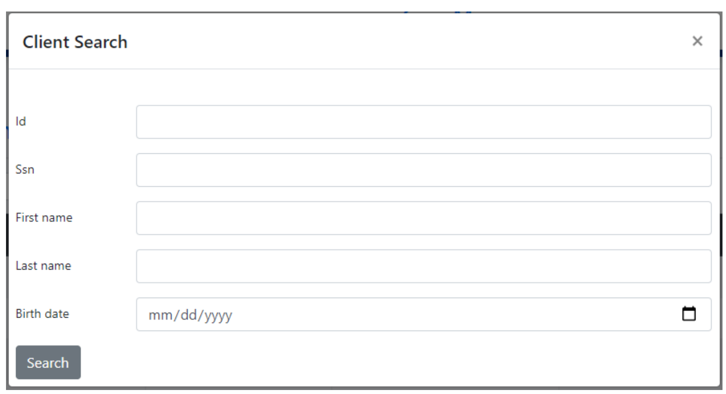
The first screen you will see is your **Recent Clients**. These are Clients your account has accessed in the past. To view a Client's Profile from here, click the blue ellipses icon on the left of their listing.

Case Manager – Client Search

If your Client is not a Recent Client, you will do a search of the MAACLink Client database to see if a Profile already exists for them. Click the **Client Search** option on the left menu.

Search Tips:

Less is more! You can type partial names ('Tim' for example), and your results list will include all names that match at least that information ('Tim' would also show 'Timmy' and 'Timothy,' etc. Clients).



Be sure you are spelling the name correctly, and typing the name into the correct fields.

"ID" is the Client ID – The unique ID for a Client Profile in MAACLink. You may search with that if the information is on a document you have from previous assistance at your agency (the Standard Intake Form, for example).

When you're ready, click the **Search** button.

Your screen will update to show your search results. If you locate your Client, click the blue ellipses next to their listing to move forward to their Client Profile.

If your Client is not on this list, try searching at least one other way before determining the Client is not in the database.

Clients

Add New Client

Show 50 entries

Search:

	ID	SSN	Last Name	First Name	Birth Date
⋮	583170	444559987	Client	Joe	1981-01-01
⋮	677703	123456789	Client	Jill	1971-09-01
⋮	693495	333224444	Client	Quincy	1978-06-30
⋮	720338		Client	Darien	1977-07-15
⋮	720340	987654321	Client	Lee	1990-01-01
⋮	720526	987654321	Client	Lee	1980-01-01
⋮	722810		client	testing	1975-01-01
⋮	722811		client	female	1985-07-07
⋮	722822		Client	Male	1980-01-01

Note: There is also a Search function on the right-hand side of the results grid. This feature allows you to search and filter the results below. This is NOT a MAACLink database search.

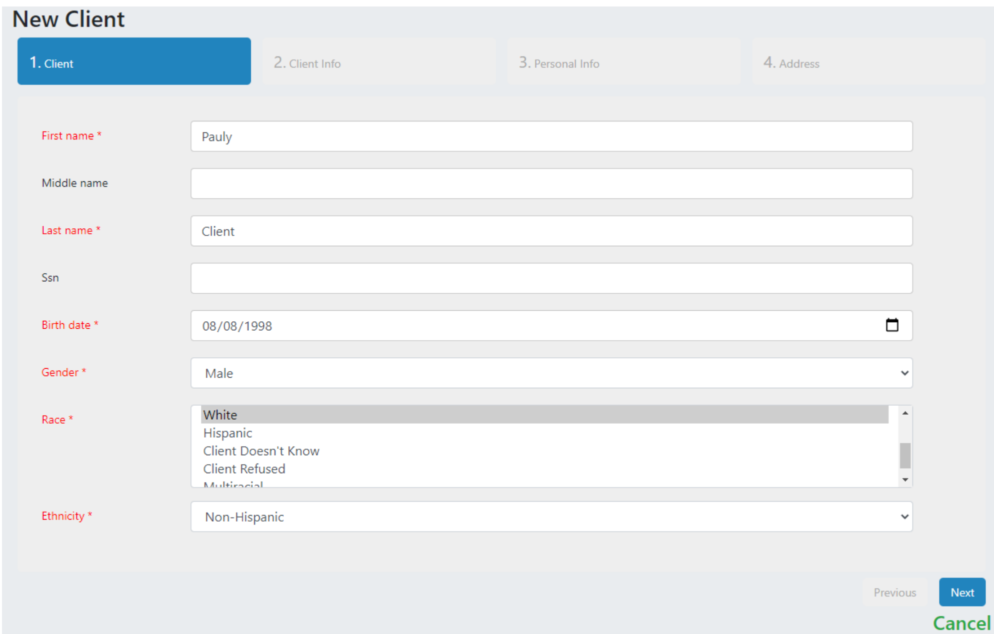
Add Client

If you're unable to locate your client by searching, you will need to create a new Client Profile. Navigate to the **Add Client** option on the left menu. The process to add a new client is 4 steps long.

NOTE: **Add Client** should only be used after an extensive search has been completed and the client was not found. Refer to **Client Search** section of this guide.

Screen 1 – New Client

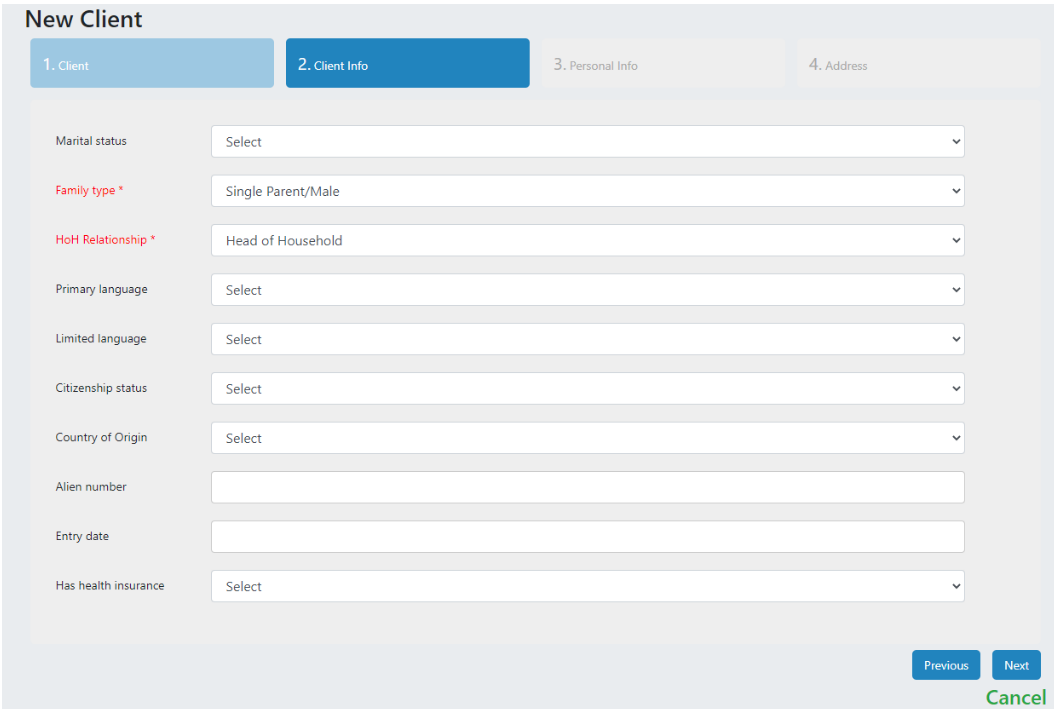
Complete all fields with an asterisk (*), then click **Next**.



Add Client Continued - Screen 2 – Client Info

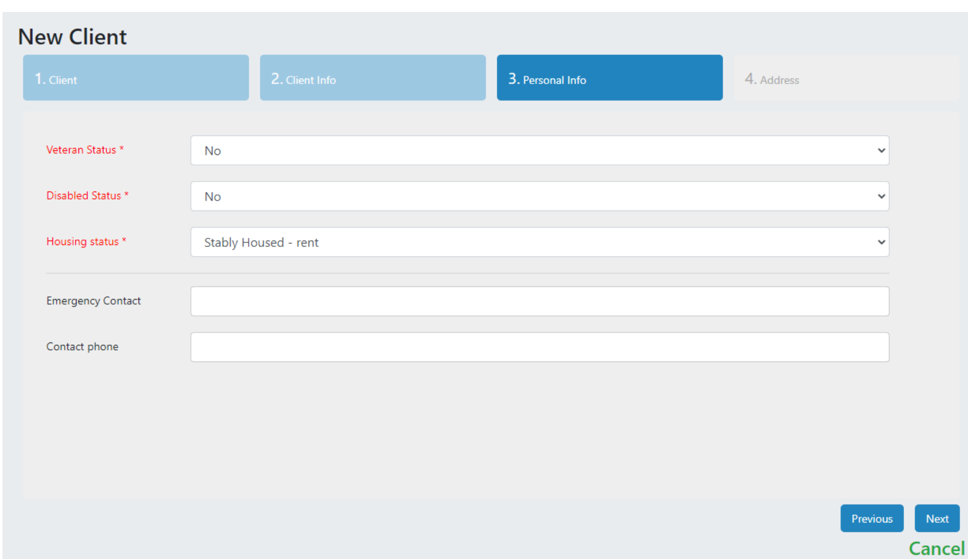
Each household must have a designated Head of Household to be able to navigate MAACLink after the Household is configured. This can always be edited later ~~on~~ as Households change.

Complete all fields with an asterisk (*) then click the **Next** button.



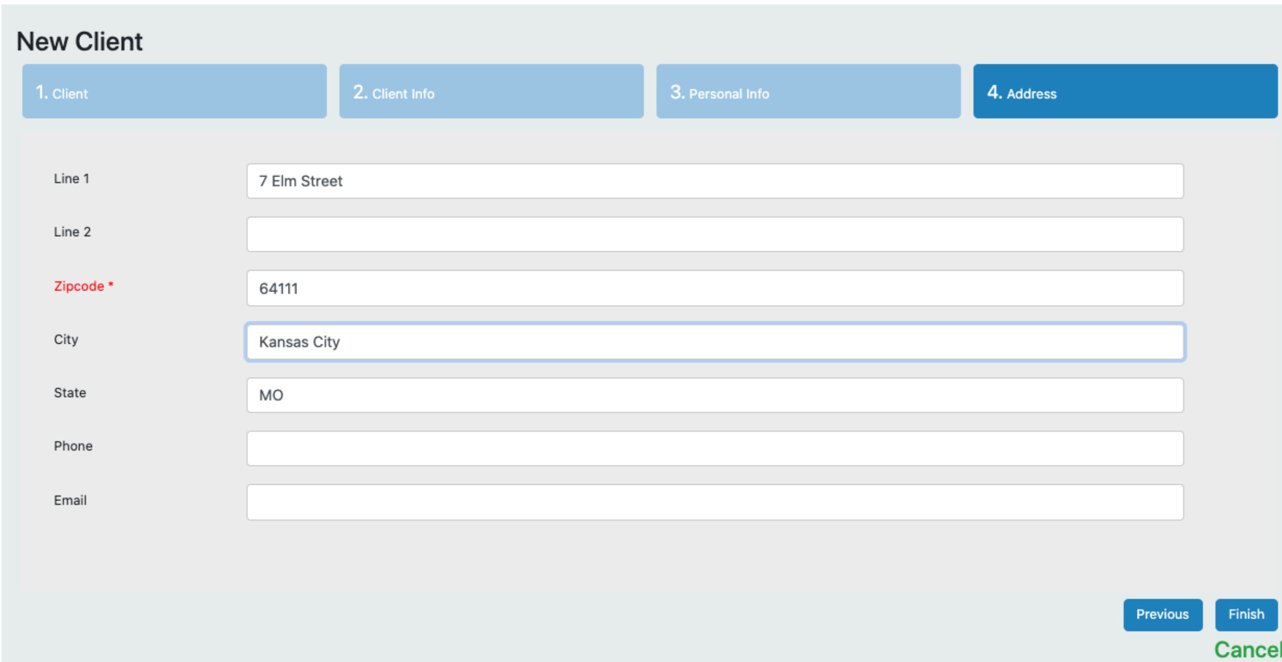
Screen 3 – Personal Info

Complete the required fields (*), then click Next.



Add Client Continued – Screen 4 – Address

Enter your Client’s Address information (and other contact information if required) then click the **Finish** button.



When the screen refreshes, you will be on your Client’s Profile and can move forward.

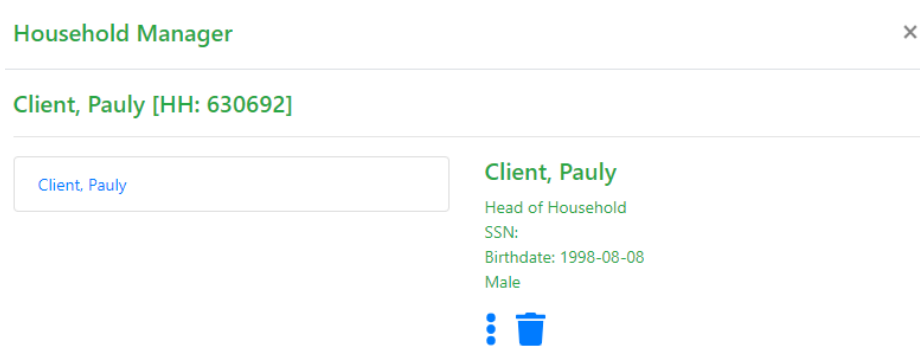
Configuring Households

Once you are on your Client's Profile, either from the search or from adding them new, you'll review their Household members next. Households are configured through the **Household Manager.**

To view the current Household configuration, click the blue sun-house icon near the top of the **Client Profile** screen to open the **Household** information. This feature will allow you to view Members, Remove Members, and toggle to other Members' Profiles.

The list on the left of the pop-up will display all individuals currently associated with this household. The name in green at the top denotes the Client Profile that is currently open in the background. If these are already your Client's current household members, you may click the **X** to close the pop-up and move forward.

To **Remove** a Member, click a name (not your current Client) on the left, then click the trashcan icon that appears on the right. This only removes them from this household; it does not delete their Profile.



To **View**/toggle to another Member's Profile, click a name on the left, then click blue ellipses icon that appears on the right. MAACLink will refresh and you will be on this Member's Profile.

To **Add Members** to this Household, close the Household information pop-up (if needed), and click the **Add Members** house icon. The actions here are:

Add Existing Member: Adds a Client to this household who already has an existing Client Profile in MAACLink. Clicking this button will open the client search box where the existing Client Profile can be located. NOTE: Try this step first to locate Household Members that might already be in MAACLink.

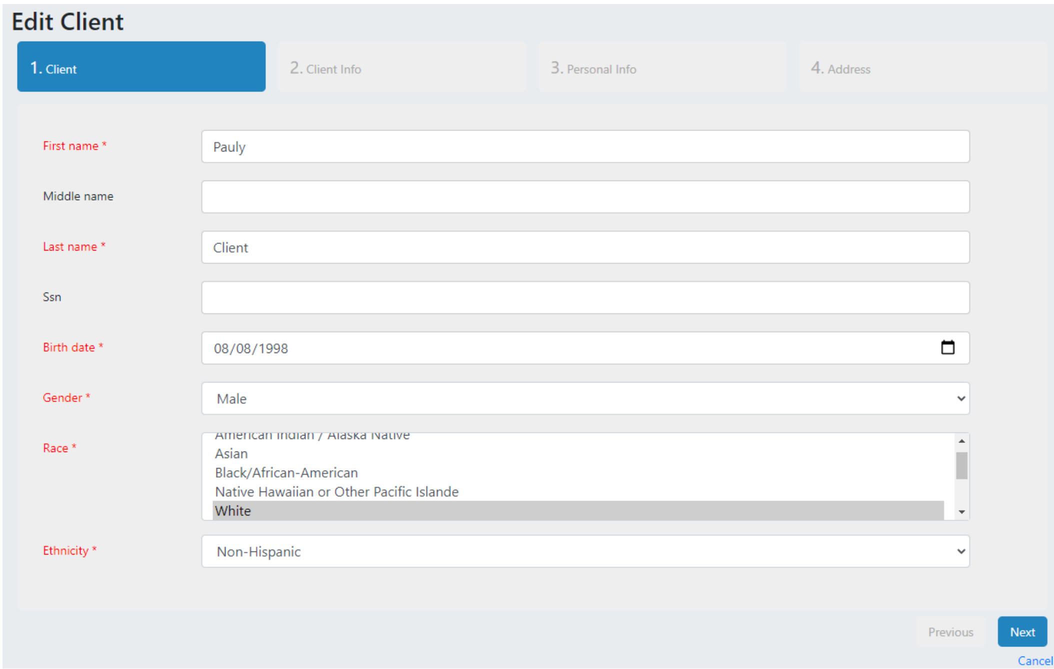
Add New Member: Adds a client to this household who does not currently have a Client Profile in MAACLink. This will take you to the **Add Client** workflow. NOTE: **Add Client** should only be used after using **Add Existing Client** and the client was not found.

Note: After managing the household, use the blue ellipses icon to navigate back to the Head of Household before working with the Assessments and Services.

Edit Clients

To make any changes to any of your Household Members' **Client Profiles,** navigate to the **Edit Client** menu option on the left or click the **Edit Client** icon next to the Client's name.

Follow the workflow to make any necessary edits to this Client's information, then click **Finish** to save.



Helpful Tip: To update a Client's relationship to the current Head of Household, that field is on the Client Info Screen (2). This is also where you can assign a Client AS Head of Household if one is needed after reconfiguring a household.

On Screen 4, you will have the option to edit the existing Address OR enter a brand new Address.

To add a NEW Address, check the "New Address" checkbox first, then enter the new Address information. This will add a new Address item to your Client's Address History.

To edit/correct your Client's existing Address, leave the box unchecked and this information will override the Client's existing Address information.

To **Edit** other Household Members, click the blue sun-house icon to open the **Household** information pop-up. Click the next Member in the grid, and click the blue ellipses to view their Profile.

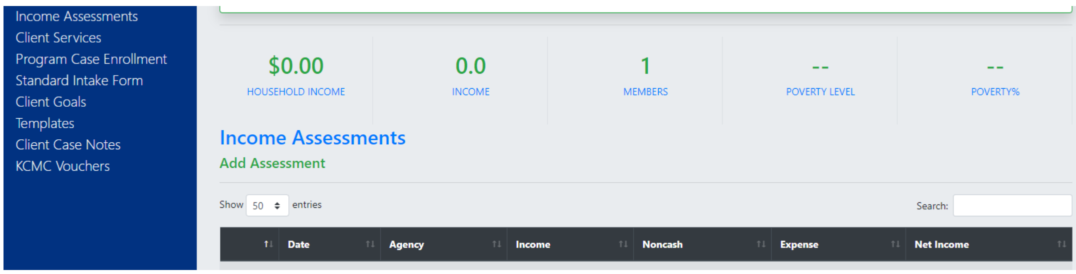
Repeat the steps of **Edit Client** for any Household Member that needs to be updated. When you are finished, if you are not currently on your Client's Profile, be sure to visit the Household information pop-up again to toggle back to their Profile before adding Services.

Income Assessments

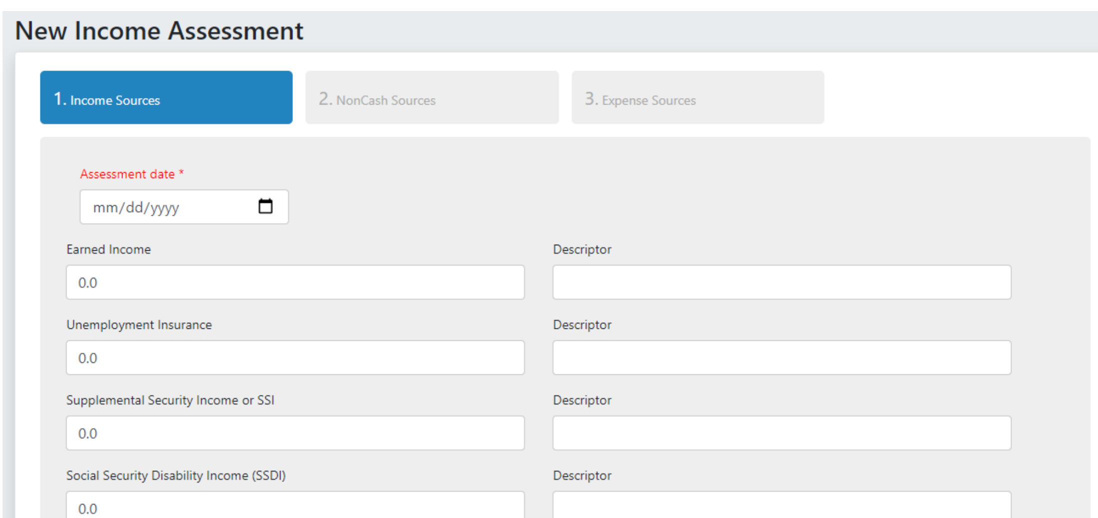
To view, edit or create a new **Income Assessment**, navigate to the **Income Assessment** option in the left menu. All previous **Income Assessments** for the client appear on the summary list in the grid.

Income Assessments capture income, non-cash sources, and expenses of a Client. Create separate Income Assessments for each Household Member who receives income or non-cash benefits. MAACLink will calculate household income automatically. The poverty percent will calculate based on the combined income for the household and is calculated at the Federal Poverty level.

To create a new **Income Assessment:**



1. Click the **Add Assessment** button above the history grid.
2. Enter the **Assessment Date.**
3. Review/Complete **Screen 1 - Income Sources** received in the last 30 days. Click **Next**.
4. Review/Complete **Screen 2 - NonCash Sources** received in the last 30 days. Click **Next**.
5. Review/Complete **Screen 3 – Expense Sources** for the past 30 days. Click **Finish**.



Tip: On each screen, enter dollar amounts (as digits and decimal points only) in the box below the **Source**. An optional note can be made in the **Descriptor** box.

To **View/Edit** an existing **Income Assessment**, click the blue ellipses next to the Assessment in the history.

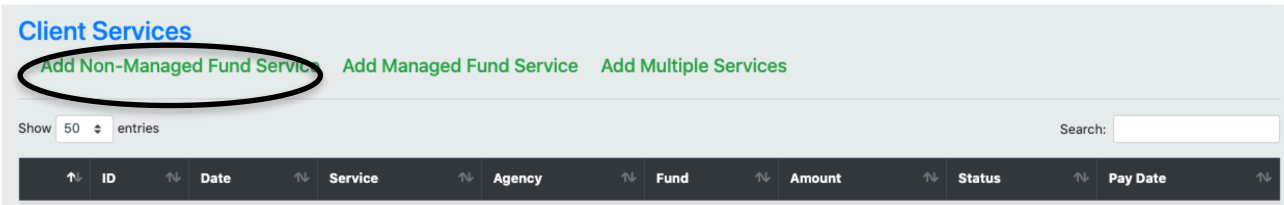
Client Services

To view, edit or create a new **Client Service**, navigate to the **Client Services** option on the left menu. All **Client Service** entries for the client appear on the summary list in the grid. Click on the column header to sort the history by that column. Use the “Search” box on the right to filter to a specific keyword.

Creating Non-Managed Fund Services

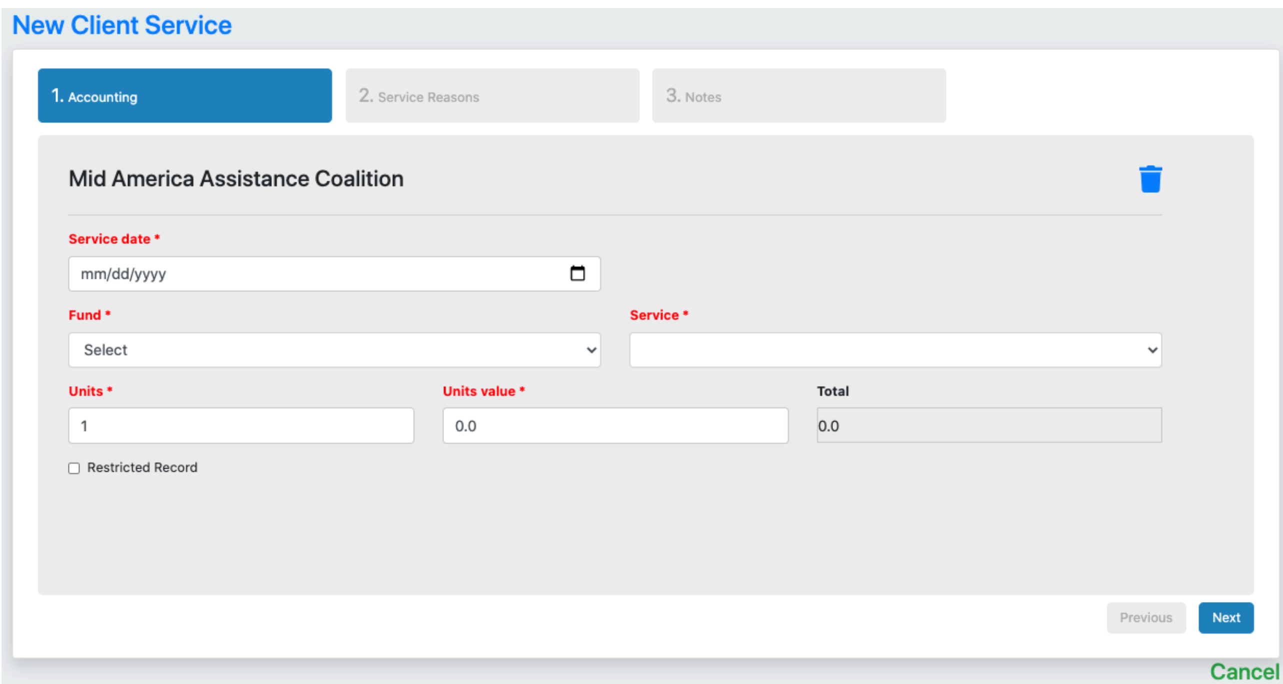
To add a new **Client Service** for a **Non-Managed Fund:**

1. Click the **Add Non-Managed Fund Service** button above the summary list.



2. You will have 3 Screens to review.
   - **Screen 1 - Accounting**:

Service Date – Date service was given.



Fund – Grant you are paying this service through.
Service – Service you are providing (options based on Fund selected).
Units – Number of items given (typically 1 for financial assistance payments)
Unit Value – The value per unit (typically amount of the bill this fund is paying)
Total field will automatically multiply Units x Unit Value to be the amount for this service.

When you're ready, click **Next**.

- **Screen 2 – Service Reasons** (all optional fields). Review and click **Next**.
- **Screen 3 – Notes** (optional **Comments** can be entered here). Review then click **Finish.**

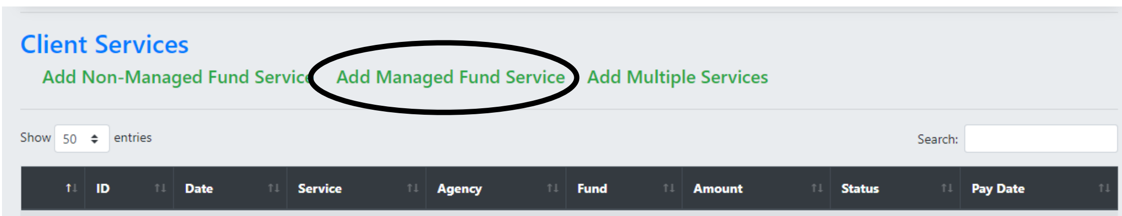
The page will refresh and you'll receive a confirmation message that the Service has saved. The confirmation will either indicate that it was successfully submitted.

Your Service will now display on the summary list.

Creating Managed Fund Services

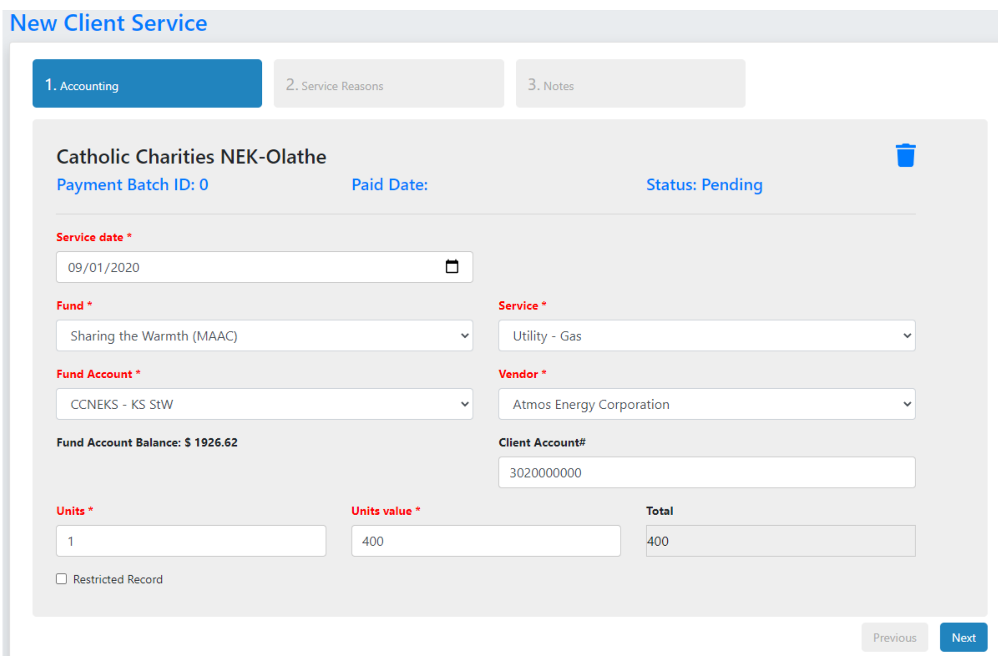
To add a new **Client Service** for a **Managed Fund:**

1. Click the **Add Managed Fund Service** button above the summary list.



2. You will have 3 Screens to review.

- **Screen 1 - Accounting**:



Service Date – Date service was given.
Fund – Grant you are paying this service through.
Service – Service you are providing (options based on Fund selected).
Fund Account – Your current available Fund Balance.

Vendor – Who receives payment for this service (options are based on Service selected).
Client Account# -- Customer account number for service being provided
Units – Number of items given (typically 1 for financial assistance payments)
Unit Value – The value per unit (typically amount of the bill this fund is paying)
Total field will automatically multiply Units x Unit Value to be the amount for this service.
When you're ready, click **Next**.

- **Screen 2 – Service Reasons** (all optional fields). Review and click **Next**.
- **Screen 3 – Notes** (optional **Comments** can be entered here).
  Review then click **Finish.**

The page will refresh and you'll receive a confirmation message that the Service has saved. The confirmation will either indicate that it was successfully submitted, OR it will notify you the service was denied.

Your Service will now display on the summary list. The "Status" column will show you that the service is "Pending" for review. Once the service has been paid, the field will update to "Paid" with a "Pay Date".

While the service is in "Pending Status," you may be able to edit or delete the request. To view the entry, click the blue ellipses next to the item. If you make any changes, be sure to move through the workflow and click the **Finish** button at the end.

***Additional information related to specific Managed Funds can be obtained by speaking with your MAACLink administrator.**

Creating Multiple Services

Multiple services is a way to capture more than one service at a time for the same client. This feature can only be used for Non-Managed Funds.

NOTE: This feature requires additional set-up by MAAC Staff.

To add Multiple Services:
1. Click the Add Multiple Services button on the Client Services screen.

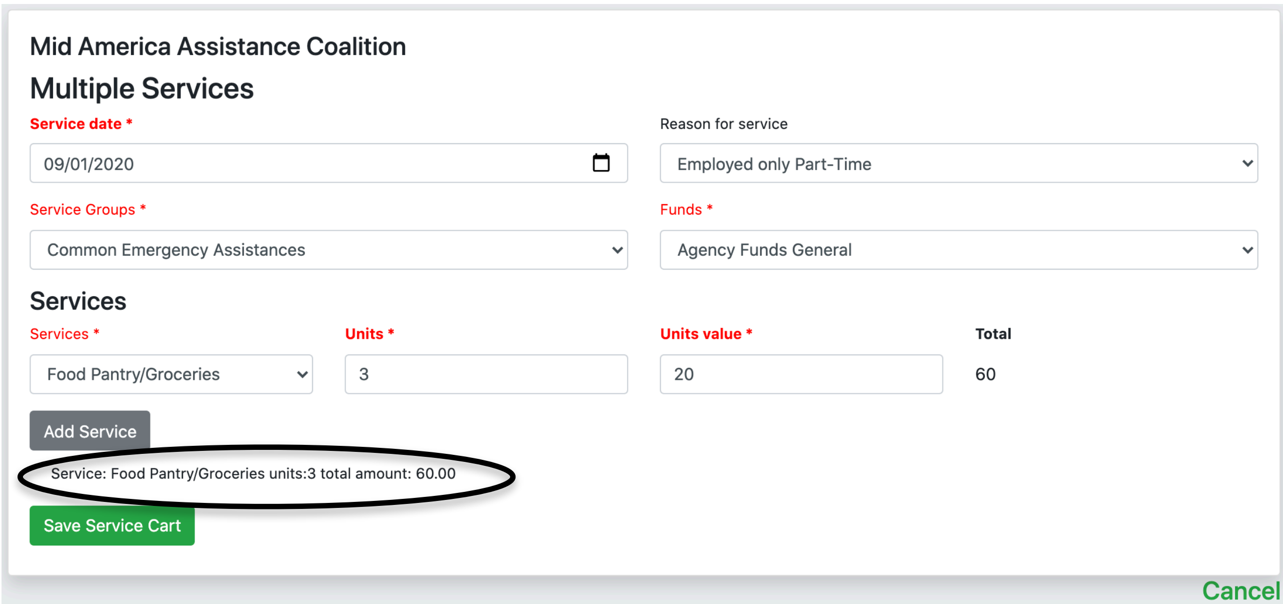
Client Services

Add Non-Managed Fund Service   Add Managed Fund Service   Add Multiple Services

Show 50 entries   Search:

	ID	Date	Service	Agency	Fund	Amount	Status	Pay Date
⋮	16749639	2020-09-06	Bus Fare/Tokens	Mid America Assistance Coalition	Agency Funds General	15.00		
⋮	16749643	2020-09-07	Utility - Water	Mid America Assistance Coalition	KCMO Water Services Fund	20.00	Auto Denied	
⋮	16749646	2020-09-09	Adoption Services	Mid America Assistance Coalition	Agency Funds General	10.00		
⋮	16749647	2020-09-09	Utility - Water	Mid America Assistance Coalition	KCMO Water Services Fund	10.00	Auto Denied	
⋮	16749648	2020-09-09	Utility - Water	Mid America Assistance Coalition	KCMO Water Services Fund	10.00	Auto Denied	
⋮	16749652	2020-09-09	Advocacy - Legal Aid	Mid America Assistance Coalition	Agency Funds General	0.00		

1. Select the Date
2. Select the Service Group
3. Select the Fund
4. Select the Service
5. Adjust Units and Unit Value accordingly



6. Click the Add Service button
7. The service will be added to the Service Cart
8. Repeat steps 1-5 to enter all services for the client, if necessary
9. Click the Save Service Cart button

The page will refresh and return to the Client Services summary screen. The newly added services will display on screen.

Creating Indirect Services

Indirect Services are used to record services provided without tying the service(s) to a client profile. This can be used for meals, holiday giveaways, outreach, etc. where client information and consent is not documented. This allows the agency to record services without going to each **Client Profile** and recording the services individually.

To enter Indirect Services:
1. Click the **Add Services** button at the top of the summary screen

Indirect Services

Add Indirect Service

Show 50 entries

Search:

	Service ID	Service Date	Service	Agency	Fund	Cost	Units	Delete
	16749598	2020-08-21	Fan	Mid America Assistance Coalition	Fan Club	51000.0	2550.0	
	16749601	2020-08-21	Address Verification	Mid America Assistance Coalition	Agency Funds General	0.0	0.0	
	16749602	2020-08-21	School Supplies/Books	Mid America Assistance Coalition	General Donations	0.0	0.0	
	16749593	2020-08-20	Air Conditioner	Mid America Assistance Coalition	Fan Club	11250.0	450.0	

Indirect Services

×

1. Service

Community assistance council

Service date 09/05/2020

Fund Agency Funds General

Service School Supplies/Books

Units 50

Units value 30

Request amount 1500

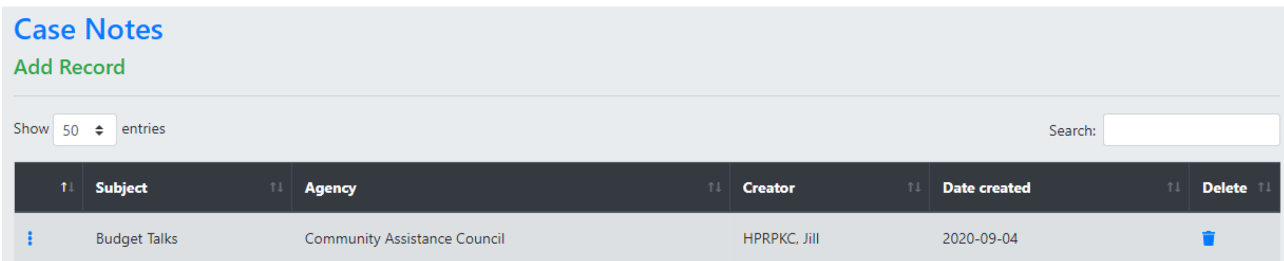
Previous Finish

1. Select the **Service Date**
2. Select the **Fund**
3. Select the **Service**
4. Enter the number of **Units**
5. Enter **Value Per Unit**, **Request Amount** will automatically calculate
8. Click **Finish** at the bottom on the right

The screen will refresh back to view the **Indirect Services** and the entry will appear at the top of the list.

Client Case Notes (Optional)

Client Case Notes can be used to capture case management sessions, budget planning, or other notes after meeting with your clients. To view, edit, print or create a new **Client Case Note**, navigate to the **Client Case Notes** menu. All **Client Case Note** entries that your agency has access to view appear on the summary list.



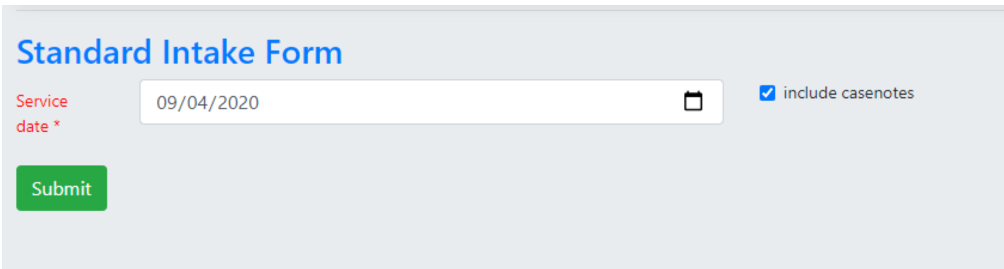
To create a new **Note**, click the **Add** button above the history grid. Complete the **Entry Date**, **Subject**, and **Message** fields. If needed, set the restriction to "By Agency" so that only other users at your agency can view the message. Click **Finish**.

To **View/Edit** a **Note**, click the blue ellipses next to it. To **Delete**, click the blue trash can next to the item.

Standard Intake Form

To generate a **Standard Intake Form** for the active Client Profile, navigate to the **Standard Intake Form** menu option. The **Standard Intake Form** produces a snapshot of client information, services and financial assessments given on a certain date. This is a document that is generated and can be printed or saved to a computer.

To produce a **Standard Intake Form**

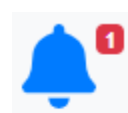


1. Enter the **Service Date**. Only Client Services provided by your agency with that Service Date will appear on the Standard Intake Form. Back-date the field if needed if you are generating this report on a later date.
2. Check **include casenotes** to add Client Case Notes that were entered on the Service Date to the Standard Intake Form.
3. Click **Submit**. The form will generate and open in a new tab or window.
   NOTE: Pop-ups must be allowed in the browser window

Client Alerts

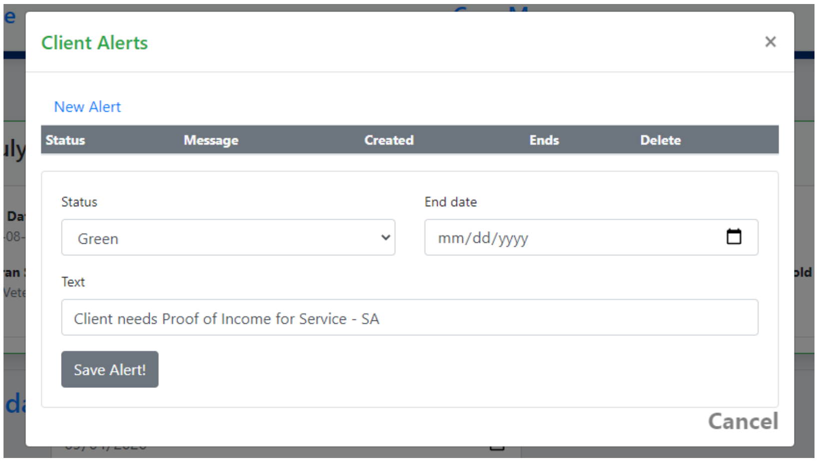
Client Alerts are used to share information about the client with other MAACLink users who view the **Client Profile**. The **Alert** is not as detailed as a case note, and is brief and objective.

Alerts are found at the top of **Client Profile.** The blue bell icon is the **Alert** interface. The client has an active alert if there is a red flag by the bell with the number of active Alerts.

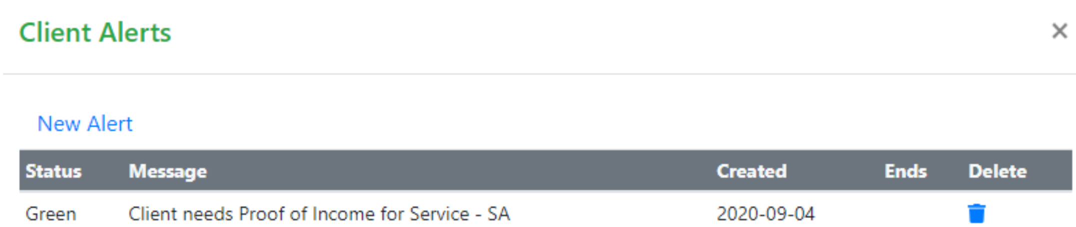


To create an **Alert**:

1. Click on the **Alert** interface (blue bell)
2. Click the **New Alert** button
3. Assign a level of importance by choosing an appropriate **Color** in the drop-down menu
4. Enter a brief note in the **Text** field
5. Provide an **End Date** (optional). The alert will disappear on the **End Date**. If no **End Date** is set, it will remain indefinitely.
6. Click the **Save Alert!** button

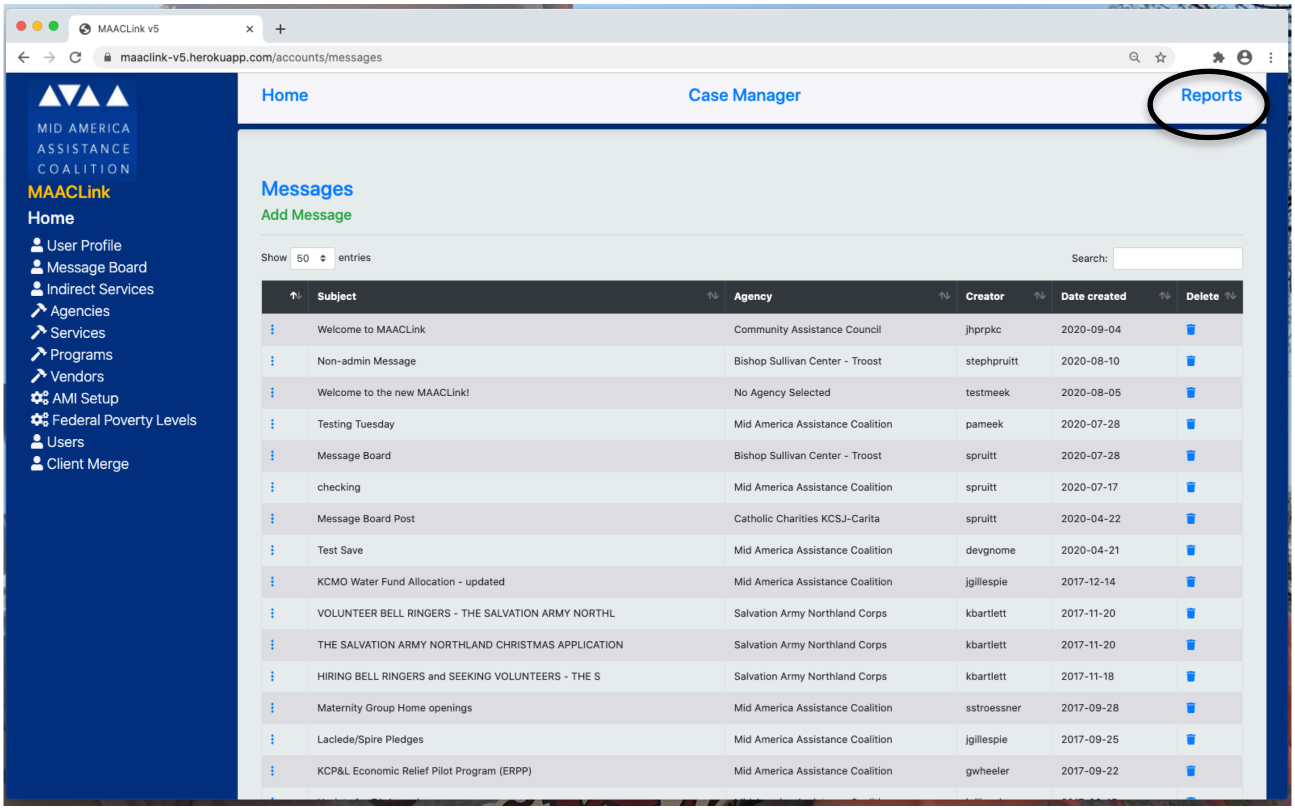


To view Active **Client Alerts**, click on the Alert Icon. The text will display at the bottom of the box. If your agency created the Alert, you will be able to click the **Delete** trash can when the Alert is no longer relevant.



Reports

Across the top of the screen there are different tabs (**Home, Case Manager, etc.**) depending on the account set up. The Reports tab will be on the far right hand side of the screen.



How Reports Are Calculated

Reports in MAACLink will report on the clients' Profile and Household configuration at time of service. This is why it is very important for both the Profile and Household to be configured and corrected before the service is entered in MAACLink.

How to Run a Report

All reports begin with setting the parameters. Any parameter marked with a red asterisk is required. Additional parameters can be set and will filter the data accordingly.

Clients Served

Begin Date: *

mm/dd/yyyy

End Date: *

mm/dd/yyyy

Agencies *

Amethyst Place
Antioch Bible Baptist Church
Avenue of Life
Benilde Hall Program
Bishop Sullivan Center - Kansas
Bishop Sullivan Center - Troost
Bishop Sullivan Center - Truman
Blue Valley Multi Service Center
CAA of GKC-Clay County
CAA of GKC-Independence

Fund

Service

States

KS
MO

Counties

Zipcode

Users

Gnomes, Digital
Jackson, Lea
Marcason, Jan
Banks, Estelle
Zimmerman, Ladonna
David Johnson,
Charles, Stephanie
Johnson, David

Age, min

Age, max

☐ Use last 4 of SSN ☐ Homeless Only ☐ Veterans Only ☐ Disabled Only

☐ **Only CSV File**

☐ **Save Report**

Submit

return to reports

After the parameters are set, click the **Submit** button in the lower left hand corner to generate the report. The report will open in a separate tab. The **return to reports** link under the **Submit** button takes you back to the Reports menu.

Note: When multiple reports are pulled in succession the appropriate Report Category must be selected before the next parameters are entered. This applies whether the same report is used with new parameters, or a completely different report is pulled.

Security of Client Level Data

Most reports display only aggregate numbers. However, some display client names, SSN, DOB and other client level data that needs to be protected. When working with reports that contain this sensitive information, the file must be password protected and must not be shared with individuals who should not have access to client information.