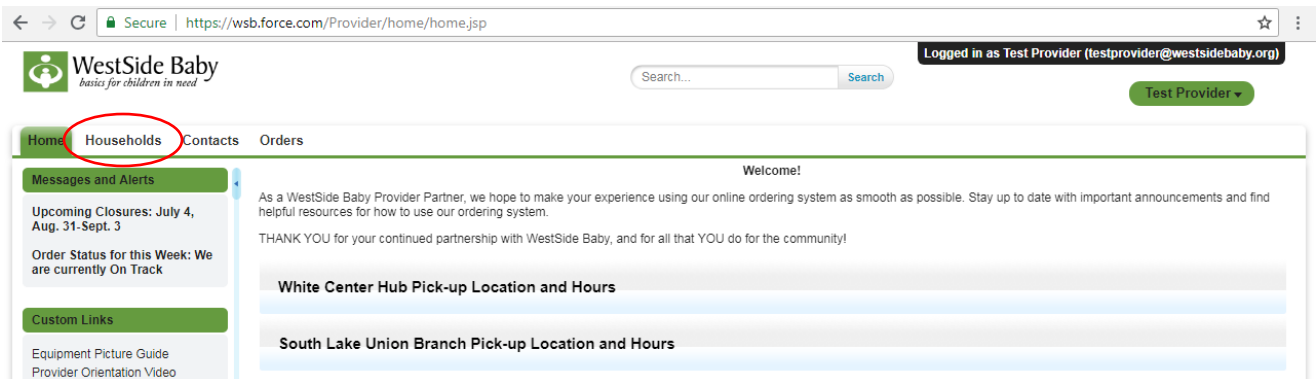


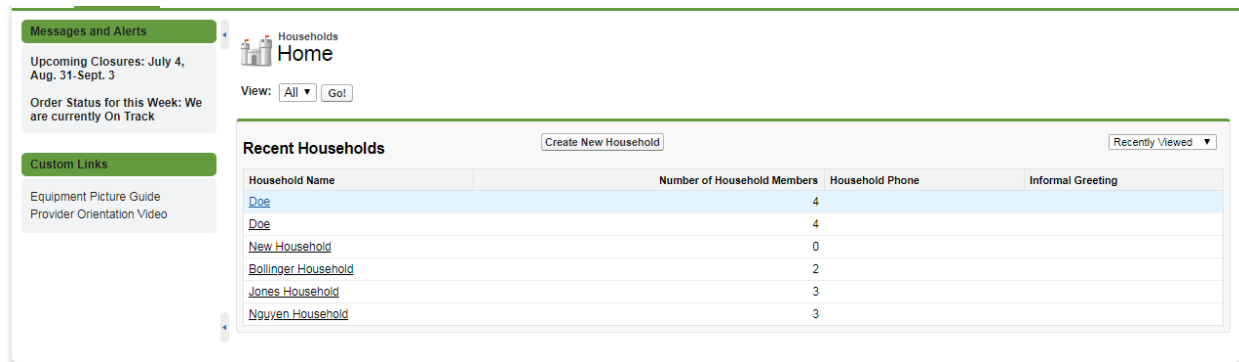
How to Create a New Recipient

To create a new recipient you must FIRST create a “Household” record for that recipient.

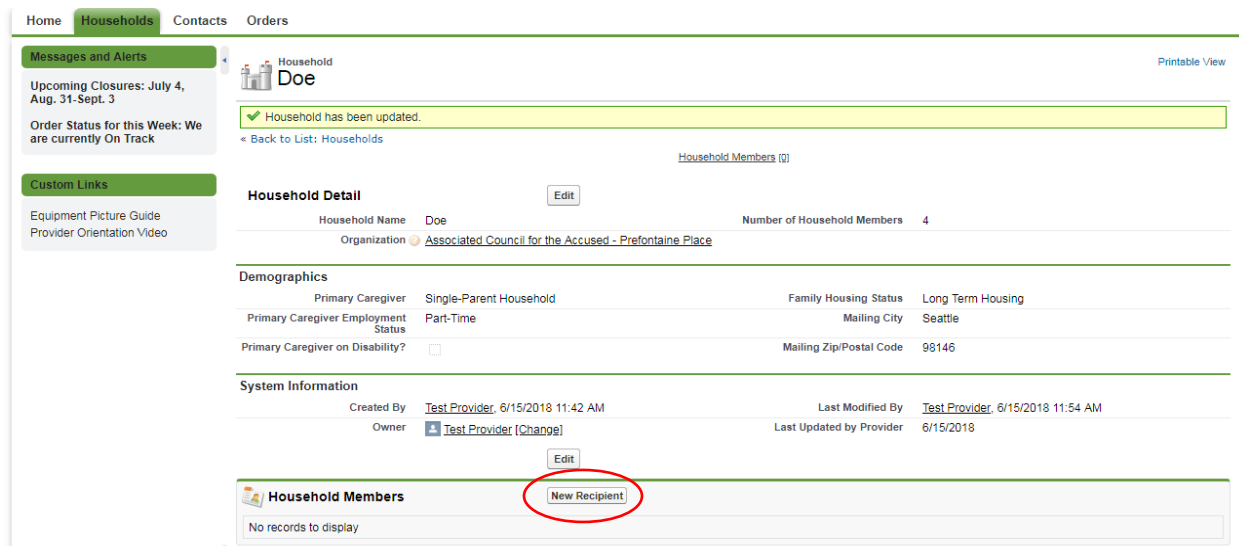
- 1) From the Provider Homepage, click the “Households” Tab



- 2) From the full list of your Household records, select the “Household Name” that is associated with the new recipient you wish to enter.



- 3) Select the “New Recipient” button next to the “Household Members” heading



How to Create a New Recipient

- 4) You will be directed to the New Contact page. Enter accurate demographic information about the individual client that you wish to order items on behalf of in the listed fields, including:
 - a. First Name
 - b. Last Name
 - c. Household – This will already be filled in based on the Household that you selected. **Do NOT edit this field.**
 - d. Account Name- This will already be filled in based on the Agency/Program/Site that your account is registered. **Do NOT edit this field.**
 - e. Gender – select “Male”, “Female”, “Other”, or “Unknown/Unborn” from the drop-down menu
 - f. Height – enter the height of the child **in inches**
 - g. Weight – enter the weight of the child **in pounds** **this is extremely important information, and must be as accurate as possible.
 - h. Clothing Size- select from the drop-down menu.
 - i. Shoe Size- select from the drop-down menu.
 - j. Birth Month – select the month that the child was born or is due to be born from the drop-down menu
 - k. Birth Year – select the year the child was born or is due to be born from the drop-down menu
 - l. Race/Ethnicity – select from the drop-down menu
 - m. Language Spoken at Home

WestSide Baby
basics for children in need

Search... Search

Logged in as Test Provider (testprovider@westsidebaby.org) Test Provider

Home Households **Contacts** Orders

Messages and Alerts

Upcoming Closures: July 4, Aug. 31-Sept. 3

Order Status for this Week: We are currently On Track

Custom Links

Equipment Picture Guide
Provider Orientation Video

Contact Edit

New Contact

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

Contact Edit Save Save & New Cancel

Salutation --None--

First Name

Last Name

Household Doe

Account Name Associated Council for the A

Contact Owner Test Provider

Last Updated by Provider

Demographics Required Information

Gender --None--

Height

Weight

Clothing Size --None--

Shoe Size --None--

Birth Month --None--

Birth Year --None--

Race/Ethnicity --None--

Language Spoken at Home --None--

Save Save & New Cancel

- 1) Once completed,
 - a. Select the “Save” button at the bottom of the page to save the Recipient Contact record. This will direct you to a page where you can edit information for this Recipient by

How to Create a New Recipient

selecting the “Edit” button or create an order for this recipient by selecting the “Create Order” button.

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Logged in as Test Provider (testprovider@westsidebaby.org)

Search... Search

Test Provider

Home Households **Contacts** Orders

Messages and Alerts
Upcoming Closures: July 4, Aug. 31-Sept. 3
Order Status for this Week: We are currently On Track

Custom Links
Equipment Picture Guide
Provider Orientation Video

Contact Edit
Save Save & New Cancel

Salutation --None--
First Name Jane
Last Name Doe
Household Doe
Account Name Associated Council for the A

Contact Owner Test Provider
Last Updated by Provider

Demographics
Gender Female Birth Month June
Height 20 Birth Year 2018
Weight 8 Race/Ethnicity Multi-Racial
Clothing Size Newborn (0-3 months) Language Spoken at Home English
Shoe Size Baby 0

Save Save & New Cancel

WestSide Baby
basics for children in need

Logged in as Test Provider (testprovider@westsidebaby.org)

Search... Search

Test Provider

Home Households **Contacts** Orders

Messages and Alerts
Upcoming Closures: July 4, Aug. 31-Sept. 3
Order Status for this Week: We are currently On Track

Custom Links
Equipment Picture Guide
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Contact Jane Doe
Printable View

Show Feed Click to add topics

Contact has been saved.

Back to List

Contact Detail
Edit Create Order

Name Jane Doe Contact Owner Test Provider [Change]
Household Doe Last Updated by Provider 6/15/2018
Account Name Associated Council for the Accused - Prefontaine Place HH Last Updated by Provider 6/15/2018

Demographics
Gender Female Birth Month June
Height 20 Birth Year 2018
Weight 8 Race/Ethnicity Multi-Racial
Clothing Size Newborn (0-3 months) ESL Unknown
Shoe Size Baby 0

Demographics (calculated)
Age 0 Years Height (formula) 1.67

System Information
Created By Test Provider 6/15/2018 3:00 PM
Last Modified By Test Provider 6/15/2018 3:00 PM

Edit Create Order

Back To Top Always show me more records per related list

How to Create a New Recipient

- a. Alternately, you can select the “Save & New” button at the bottom of the page. This will direct you the page where you can enter another Recipient contact under this same Household (i.e. a sibling, etc.)

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basics for children in need

Logged in as Test Provider (testprovider@westsidebaby.org)

Search... Search

Test Provider

Home Households **Contacts** Orders

Messages and Alerts

Upcoming Closures: July 4, Aug. 31-Sept. 3

Order Status for this Week: We are currently On Track

Custom Links

Equipment Picture Guide
Provider Orientation Video

Contact Edit
New Contact

✔ Contact has been saved.

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

Contact Edit Save Save & New Cancel

Salutation --None-- Contact Owner Test Provider

First Name Last Updated by Provider

Last Name

Household Doe

Account Name Associated Council for the A

Demographics Required Information

Gender --None-- Birth Month --None--

Height Birth Year --None--

Weight Race/Ethnicity --None--

Clothing Size --None-- ESL --None--

Shoe Size --None--

Save Save & New Cancel