KeyWare

Quick Reference Guide

Version 1.0 – April 29, 2008

TribeWare

TVCCA Information Systems

Getting to KeyWare…
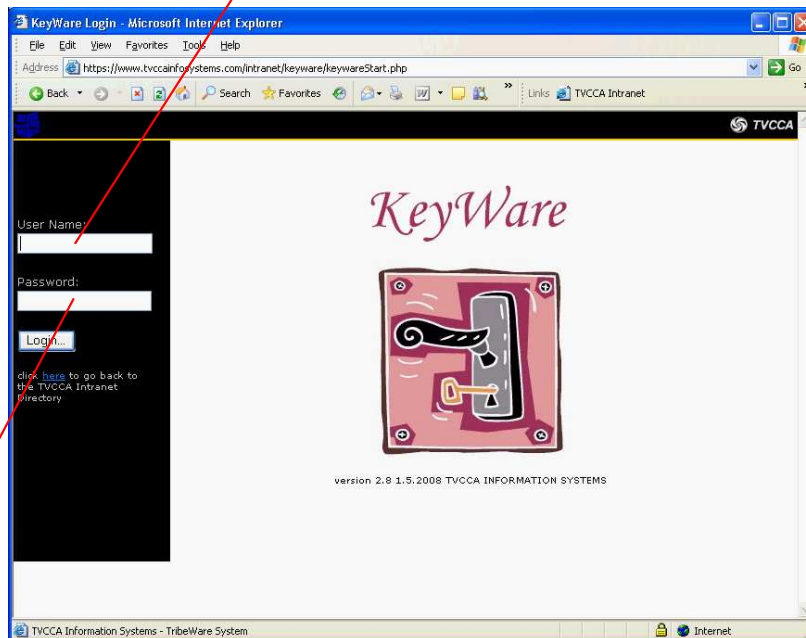
In Internet Explorer go to the following site: **http://www.tvccainfosystems.com**
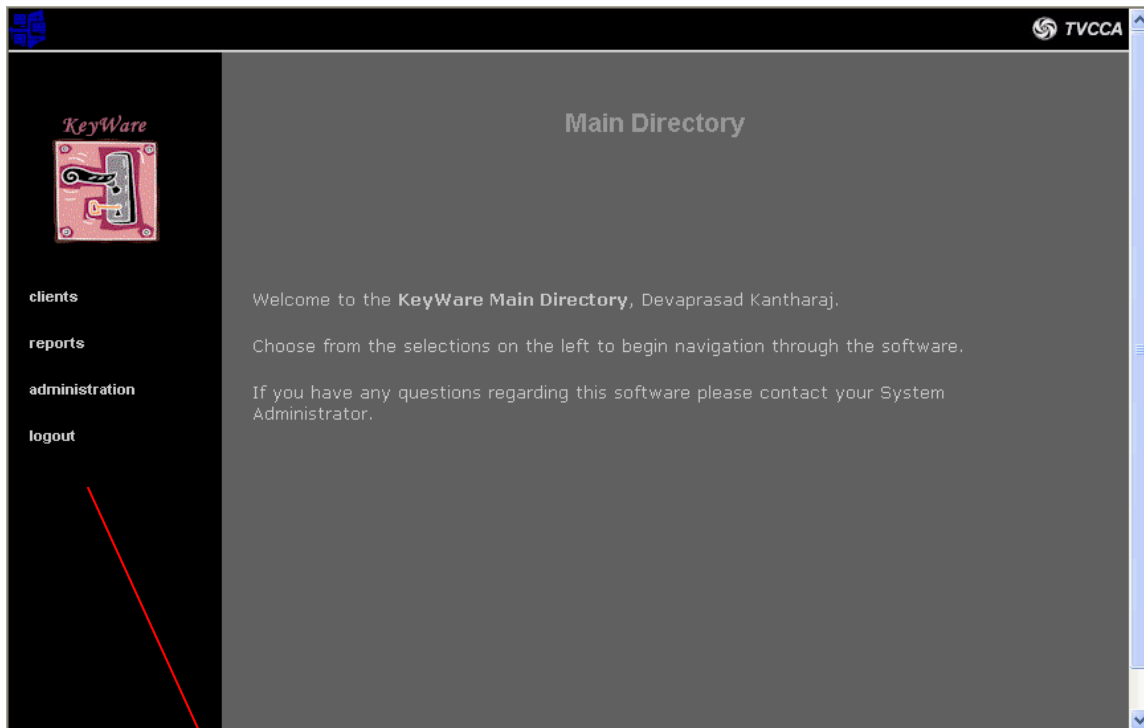
Logging into KeyWare…

1. Enter your username in the field indicated.

2. Enter your password in the field indicated.

3. Click the **LOGIN** button.

Type your user name here

Enter your password here.

The Main Directory…

Click on these links to navigate through KeyWare

CLIENTS: opens a page to search for clients

REPORTS: opens the reports directory from where one can run reports

ADMINISTRATION: if you have security privileges as a KeyWare Administrator, use this link to setup various parts of the software for your agency

LOGOUT: use this to properly logout of KeyWare

The Client Directory

Click here to begin client intake

Enter your search criteria in any one of the fields

Click here to begin the search

TO SEARCH FOR A CLIENT

1. Enter your search criteria in any one of the fields

2. Click the **FIND** button

TIPS for searching…

-If you are using the **social security** or **telephone number** fields, do not use any dashes, spaces, or other punctuation. For instance, if you are searching for Social Security number 012-34-5678, type in *0123425678*.

-Include the area code in the **telephone number** field. For instance, to search for (860) 999-1234, type in *8609991234*

-You can search for clients that begin with <u>partial</u> search criteria. For instance, to search for all clients' **last names** that begin with the letters 'Sa', type in *sa* in the last name field.

Viewing a Client…

The client's name and client ID (system identification number assigned by the software)

Universal note area – can be viewed by all staff in all TribeWare modules

Click on these links to navigate through the client screens

LINKS…

CLIENT VIEW: the current page which you are viewing

CLIENT SERVICES: opens a screen where all services/interventions for the client are listed and new ones can be added

CLIENT CASE NOTES: opens a screen to view and enter case notes for the client

CLIENT GOALS: opens a screen to view and enter client goals including goal templates

CLIENT DOCUMENTS: add, view, and print various forms and documents for the client

HOUSEHOLD VIEW: view and edit the household and household members including client income and other demographic information

CLIENT DIRECTORY: return to the Client Directory

The Household Information Screen…

General household information

Click on a household member to edit their information like their income or demographics

Click on these links to navigate through the household screens

LINKS…

HOUSEHOLD VIEW: the current page which you are viewing

HOUSEHOLD SERVICES: opens a screen where all services/interventions for the household (all household members) are listed

ASSESSMENTS: opens a screen to add, view, and print pre-assessments and full-assessments

CLIENT GOALS: opens a screen to view and enter client goals including goal templates

ELIGIBILITY: if enabled for your agency, will list programs for which the household is eligible

SNAPSHOTS: add or view household snapshot information
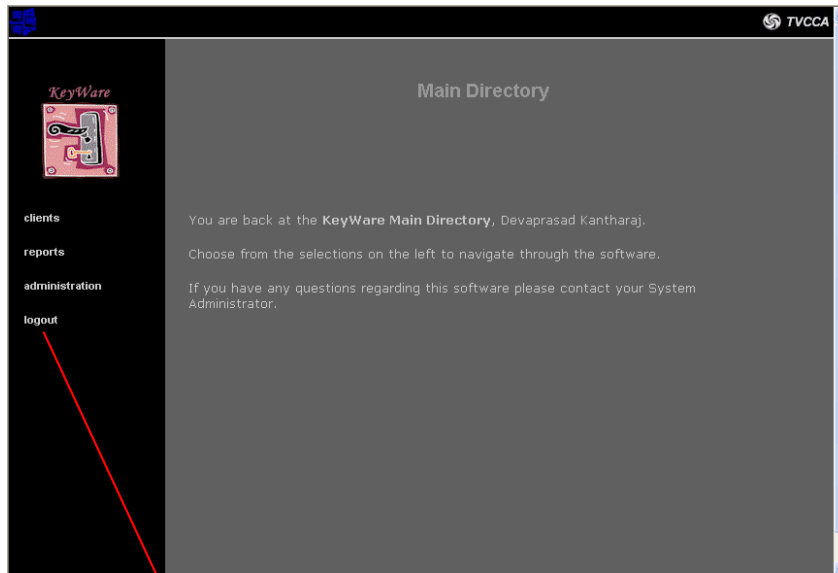
CLIENT VIEW: return to view the main client screen

Logging Out…

1. From **anywhere** in the software except during client intake, find the KeyWare logo on the upper-left portion of your screen and click on it to bring you back to the Main Directory

Click on this logo to bring you back to the Main Directory

2. Click on **LOGOUT** to properly logout of KeyWare.

*Click here to **properly** logout of KeyWare*

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