

MSC Training 01 - People and Their Data



In this training, we will review:

- Overview of the program showing all sections that are offered
- Managing and adding participants
- Standard and custom fields
- Adding photos
- Managing various drop-down menus (categories and types)
- Equipment Rental/loans
- Managing System Preferences and Touchscreen Settings
- Managing Volunteers, Instructor and Drivers

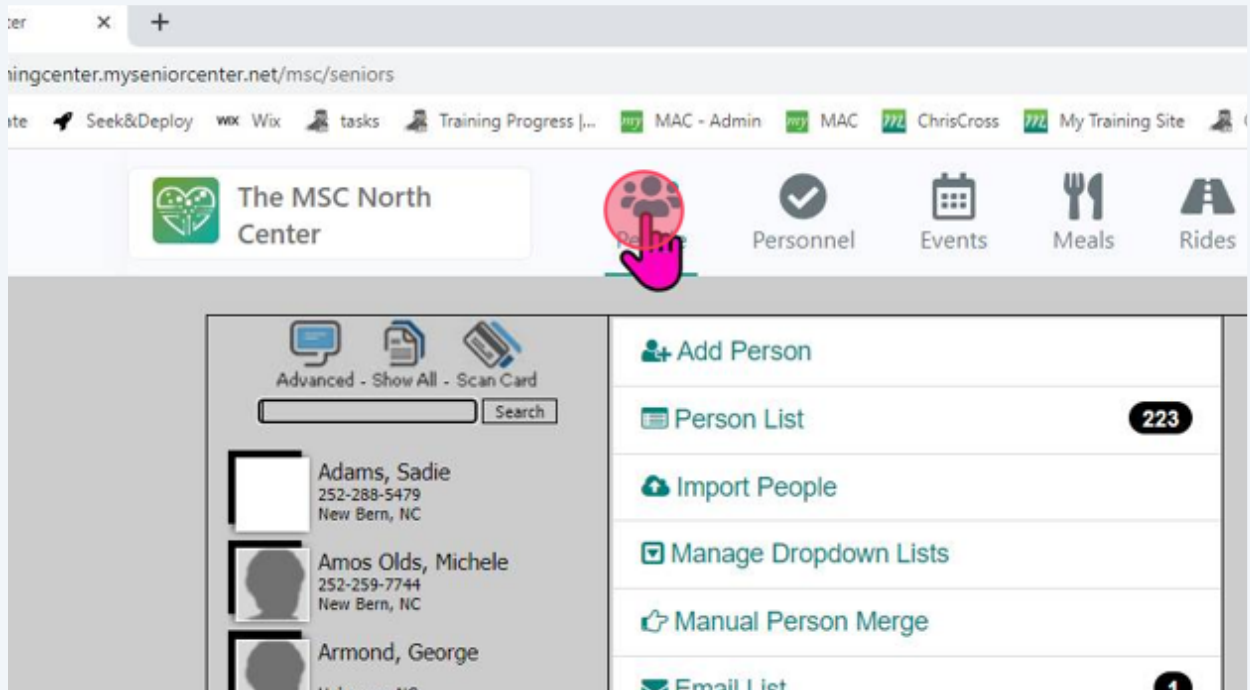
Adding and Updating People

1 After Logging in, Click "People"

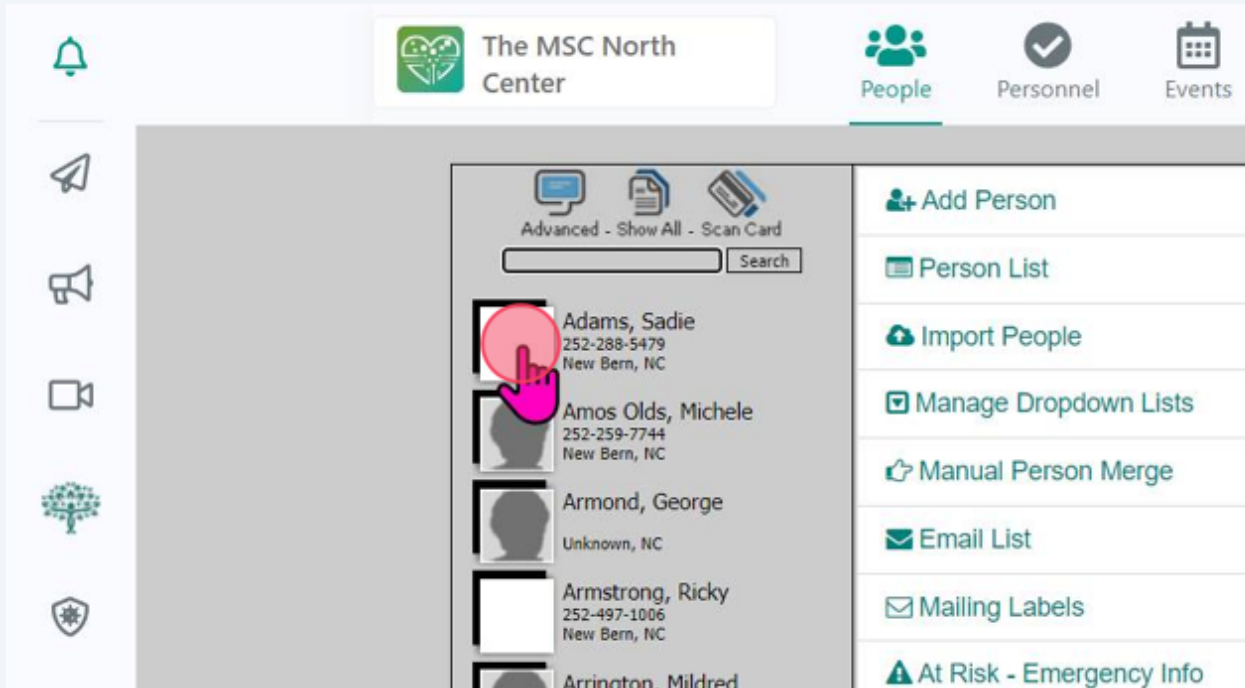
The screenshot shows a web browser window with the URL 'ningcenter.myseniorcenter.net'. The browser's address bar and tabs are visible. The main navigation bar includes the MSC North Center logo and several icons: a group of people (highlighted with a pink hand cursor), a checkmark, a calendar, a fork and knife, and a pair of glasses. Below the navigation bar, there are buttons for 'ADD TEMPLATE' and 'ROOM SCHEDULE', a search bar for event templates, and a section titled 'Event Templates' with a card for 'Bills Art Class'.

2

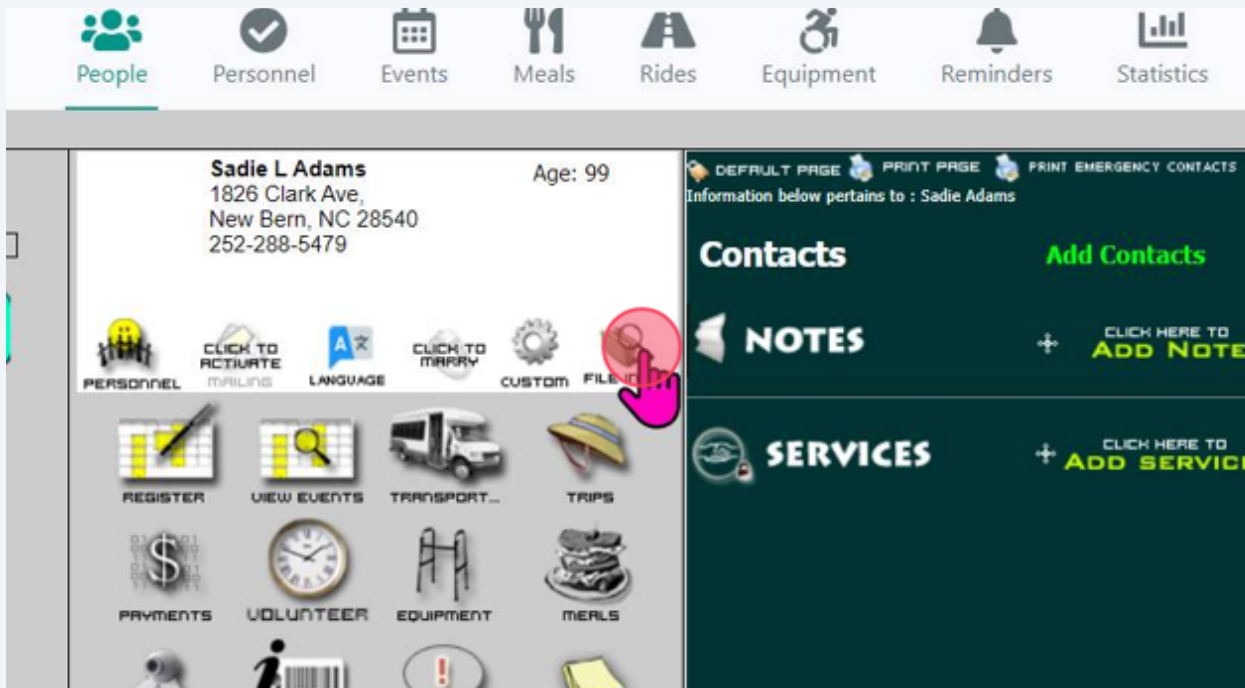
The people tab is your filing cabinet. Anybody and everybody that you're tracking in MySeniorCenter will have a file under the people tab. It doesn't matter if they are a participant, volunteer, instructor, etc. Everyone has a record in the people tab. When you 1st come to the people tab. You'll see a short list of people at a time. The people are alphabetically ordered and if you wanted to you could click the arrows down at the bottom of the list to go through the pages alphabetically. Normally you'll use the search box at the top of the list . You can search by first name, last name, middle name and nickname. You can also search by address, phone number, email address and zip code.



3 Click a Person



4 When you click on a person you're selecting that person's file and you'll see that person's information in the center pane. To get into that person's file click "File Info".



5

That opens up that person's file on the right hand side. That's our standard fields area in MSC. All centers that use MSC have the same exact fields here. This is what comes with MSC when any center starts using it. You'll see when entering a new person that it is not all required. Even if all you have is a person's name you can get them into MSC. Standard fields other than First and Last name can be ignored but they cannot be removed from MSC. To the left of the file Info Icon you'll find the Custom Icon. Click it.

The screenshot shows the MSC North Center software interface. At the top, there's a navigation bar with icons for People, Personnel, Events, Meals, Rides, Equipment, Reminders, and Statistics. Below this is a search bar and a list of people. The main area displays the profile for Sadie L. Adams, including her contact information and a grid of icons for various services like Register, View Events, Transport, Traps, Payments, Volunteer, Equipment, Meals, Add Photo, Assign Card, Refinders, Notes, Groups, Statistics, Logs, and Files. A red circle highlights the 'FILE INFO' icon. On the right, there's a form for personal information such as Disabilities, Allergies, Identification Number, Title, First Name, Nickname, Middle Initial, Last Name, Name Suffix, and Date of Birth.

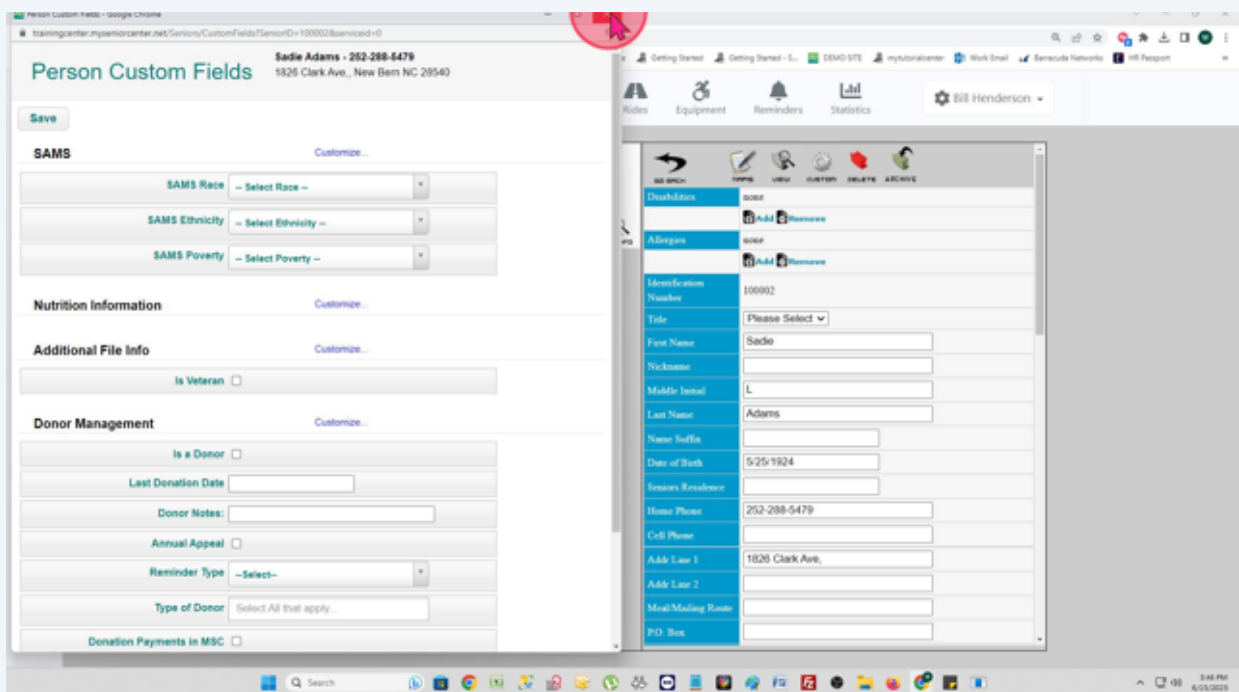
Field	Value
Disabilities	code Add Remove
Allergies	code Add Remove
Identification Number	100002
Title	Please Select
First Name	Sadie
Nickname	
Middle Initial	L
Last Name	Adams
Name Suffix	
Date of Birth	5/25/1924

6

That opens the custom fields window. You're doing the same exact thing here, just entering in information about the person but we call it the custom fields area because you can customize this section. Whenever a new customer sends us their data to get started with we will always build custom fields for anything that falls outside of what we have for standard fields but you will always have the ability to add more custom fields if anything new ever comes up that you need to start tracking. Click any customize link to add sections and fields to MSC. You can create drop down menus, multi-select menus, text fields, date fields and check boxes.

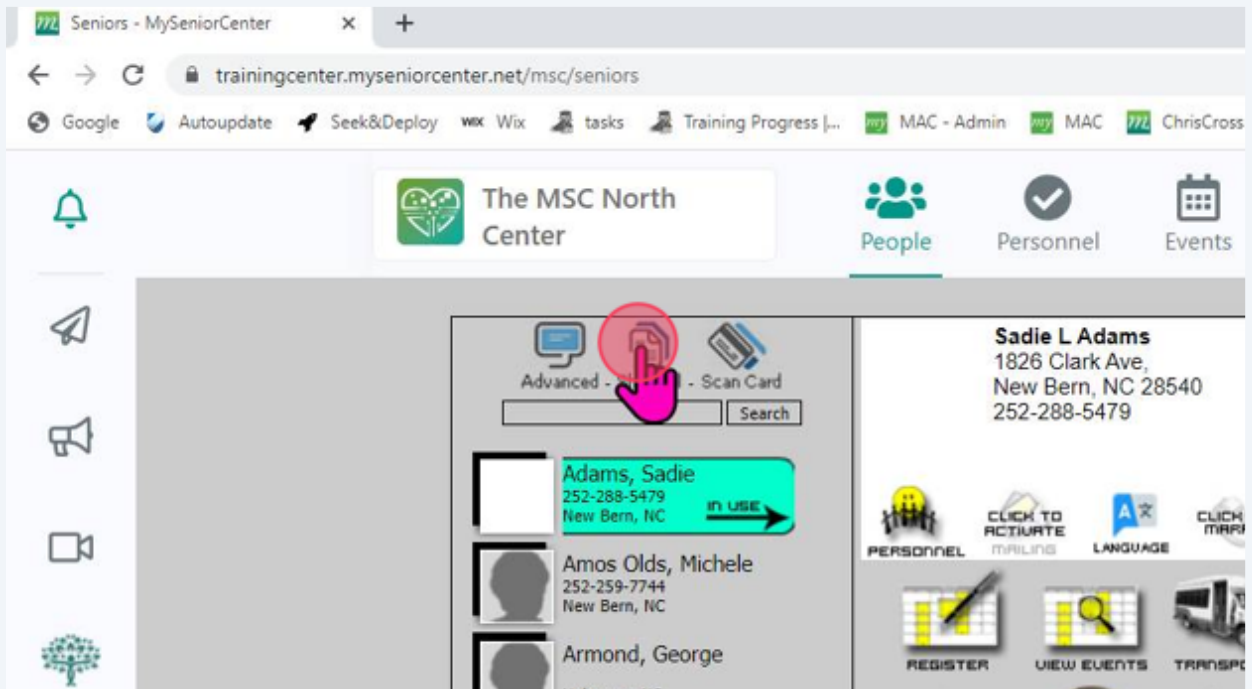
File info and custom fields are your two primary data areas in the program. Most information you collect on folks is going to be in one of the two spots. These are always separate sections so best practice is, when looking up information on a person, go to file info first then custom fields and you'll have everything on one screen.

Close the custom fields window.



7

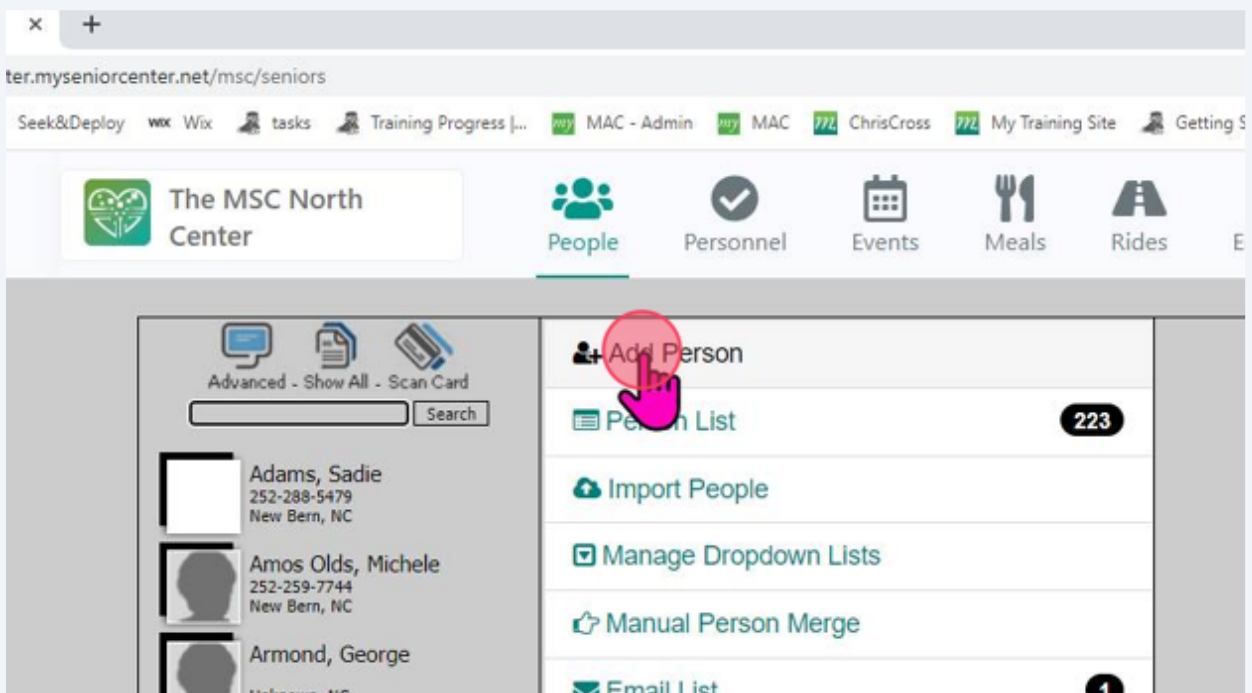
Click Show all above the search box. This always clears the search results and bring back all of the icons in the center pane.



8

Click " Add Person"

Remember, it doesn't matter who the person is yet. Everyone gets added the same way. Once added you can indicate things like , volunteer, driver, instructor, etc.



9

You'll get a pop-up window. The only thing MSC will force you to fill in is the first name and the last name. Everything else is optional but does serve a purpose.

- The nickname is for the touch screen. Whenever anyone checks in at the touch screen it says their first name on the screen. If you fill in a nickname it will use their nickname.
- Birth date is use for statistics. You will be able to see how many people are in different age groups and use the DOB as a filter when running any statistic. MSC also has a birthday list. With just a couple clicks you get a list of everyone that has a birthday in whatever month you chose then you can send out a broadcast call, text or email and even print out mailing labels for birthday cards.
- Filling in a phone number will allow you send out broadcast calls. Phone numbers can be formatted in any way.
- If you fill in a cell phone number then the broadcast calls go to both numbers.
- If you fill in only one or the other then broadcast calls go to whichever one you filled in. It is perfectly file to leave the phone spot blank if the person only has a cell phone.
- Email will allow you send out email broadcasts as well.
- Entering a person's address will allow you to print mailing labels. Statistics will show how many people are coming from each city.

Click "Add" to go to page two.

The image shows a registration form on the left and a pop-up window on the right. The form has the following fields:

First Name	Sam	M.I.	Kendle
Last Name	Smith		
Nickname	Ken		
Date of Birth	1/1/1901		
Phone	789-963-7854		
Cell Phone	785-745-9248		
E-Mail	ken@gmail.com		
Gender	Female		
Sexual Orientation	Unknown		
Joined Date	6/15/2023		
14 Springfield Court, Rochester, NH, USA			
Address Line 1	14 Springfield Court		
Address Line 2			
PO BOX			
City	Rochester		
State / Province	NH		
Zip / Postal Code	03867		

The pop-up window on the right is titled "Select Person's Address" and contains the text: "Type the Address Information for the Person Example: 5 Oak Lane, 39 Main Street". Below this text is a "Next" button with a right-pointing arrow.

At the bottom of the form, there is a red "ADD" button with a mouse cursor pointing to it. Below the button is a link: [Click here to print a blank registration form.](#)

10

Everything on page two is optional but it all does serve a purpose. Things like Ethnic Status, Disabilities, Allergies, Head of Household, lives alone all pull to the statistics. Disabilities and Allergies also pull to the emergency contact sheet. We also want to fill in their primary emergency contact info. You will also be able to enter additional contacts later. Click Custom if you wish to enter any custom field data.

addsenior2.asp?key=100226

MORE INFO FOR Sam Smith

Ethnic Status	Please Select	Allergies	none
	Manage List		Add Remove
Disabilities	none	Person's Residence	Please Select Manage List
	Add Remove	Meal Route	Please Select Manage List
Head of House	<input type="radio"/> Yes <input checked="" type="radio"/> No	Mailing Route	
Deceased	<input type="radio"/> Yes <input checked="" type="radio"/> No	P.O. Box	
Mailing List	<input type="radio"/> Yes <input checked="" type="radio"/> No	E-mail	ken@gmail.com
Person Lives Alone	<input type="radio"/> Yes <input checked="" type="radio"/> No	Emergency Name	
Lives in rural area	<input type="radio"/> Yes <input checked="" type="radio"/> No	Emergency Relation	
		Emergency Phone	

11

Be sure to click save before closing the custom fields window.

Person Custom Fields - Google Chrome

trainingcenter.myseniorcenter.net/Seniors/CustomFields?SeniorID=100226&serviceid=0

Person Custom Fields Sam Smith - 789-963-7854
14 Springfield Court, Rochester NH 03867

Save

SAMS [Customize...](#)

SAMS Race -- Select Race --


SAMS Ethnicity -- Select Ethnicity --

SAMS Poverty -- Select Poverty --

Nutrition Information [Customize](#)

12 Click "Save" when finished.

Deceased	<input type="radio"/> Yes <input checked="" type="radio"/> No	P.O. Box	
Mailing List	<input type="radio"/> Yes <input checked="" type="radio"/> No	E-mail	ken@gmail.com
Person Lives Alone	<input type="radio"/> Yes <input checked="" type="radio"/> No	Emergency Name	Sally
Lives in rural area	<input type="radio"/> Yes <input checked="" type="radio"/> No	Emergency Relation	Wife
		Emergency Phone	Smith

 Save Save And Add New

13 The window will close and the new person will be selected right away so you can continue on with the rest of the steps.

Navigation bar: People, Personnel, Events, Meals, Rides, Equipment, Reminders, Statistics

Sam Kendle Smith (Ken) Age: 122
14 Springfield Court
Rochester, NH 03867
789-963-7854
[E-Mail](#)

DESKTOP PAGE PRINT PAGE PRINT EMERGENCY CONTACT
Information below pertains to : Sam Smith


Contacts Add Contacts

NOTES + CLICK HERE TO ADD NOTES

SERVICES + CLICK HERE TO ADD SERVICES

CLICK TO ACTIVATE PERSONNEL CLICK TO ACTIVATE MAILING LANGUAGE CLICK TO MARRY CUSTOM FILE NEW

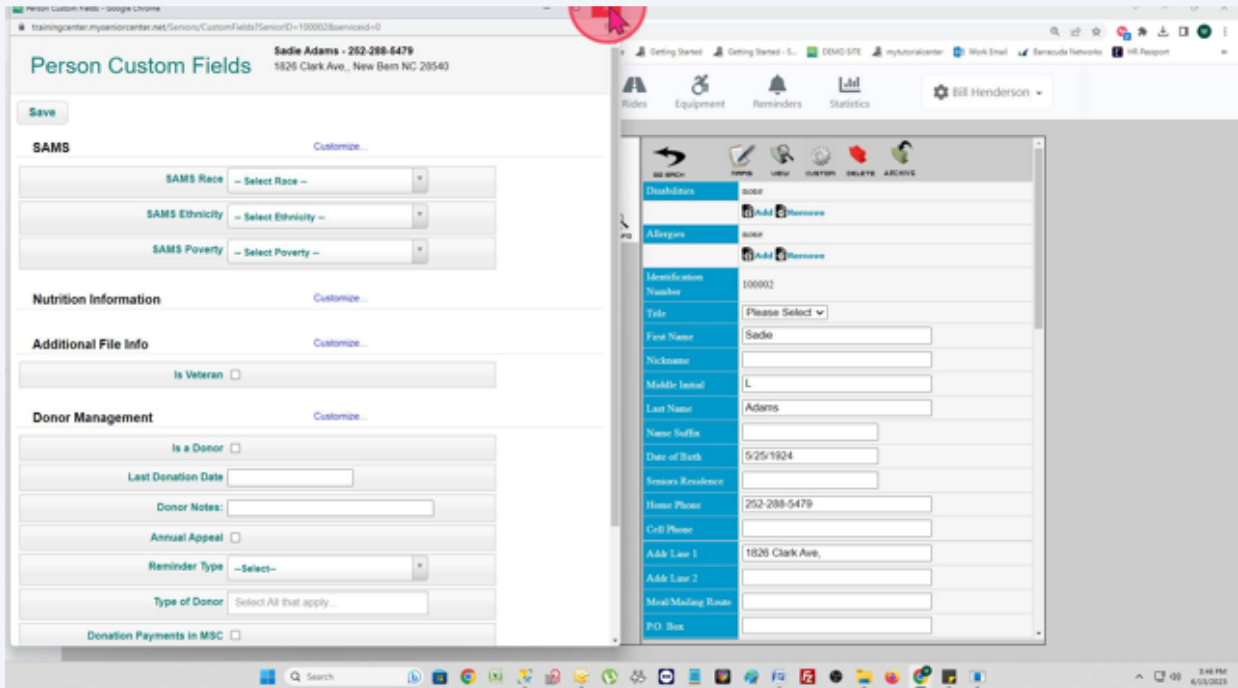
REGISTER VIEW EVENTS TRANSPORT... TRIPS
PAYMENTS VOLUNTEER EQUIPMENT MEALS



14

Everything we just added will be in File info and Custom Fields. Nothing is set in stone. Anything can be edited from file info or custom fields at any time.

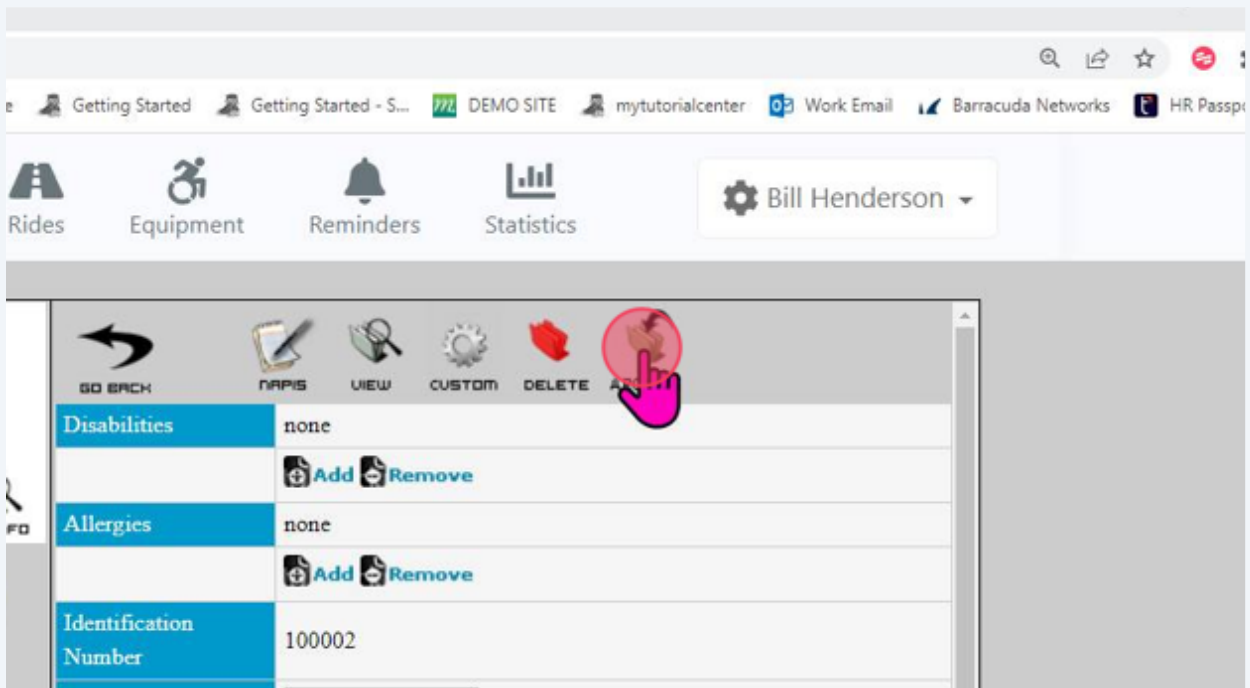
Close the Custom Fields Window



Deleting, Archiving and the Deceased Setting

15

In my senior center you're never really deleting a real person who has attended the center. When we delete someone it's like taking their file out of the filing cabinet and throwing it in the shredder. In my senior center. We have much better ways to handle the different situations that come up where you might think you should delete a person. For example, Maybe you found a duplicate record. You wouldn't want to just pick one to delete because there may be important information on one that's not on the other and vice versa. We have a way to merge duplicate records together so there's no need to delete one and lose important information. So in that situation you would not delete. If a person is no longer active at the center you can archive their file if you want to. When you archive someone's file you're not losing any information on them. If you were to look at a past roster for an activity that they attended on a specific date they're still going to be on that roster. If you run a report for a time period in which they were active they're still going to show up on that report. We're just giving ourselves the ability to hide their file away.



16

When you click archive and then confirm, the person will be highlighted yellow. Yellow means archived.

Archiving this person will hide them from the People section, but they will still continue to show up in statistics, event lists, etc.

You can view archived people by clicking on Advanced and checking the box next to View Archived People.

Confirm Archive

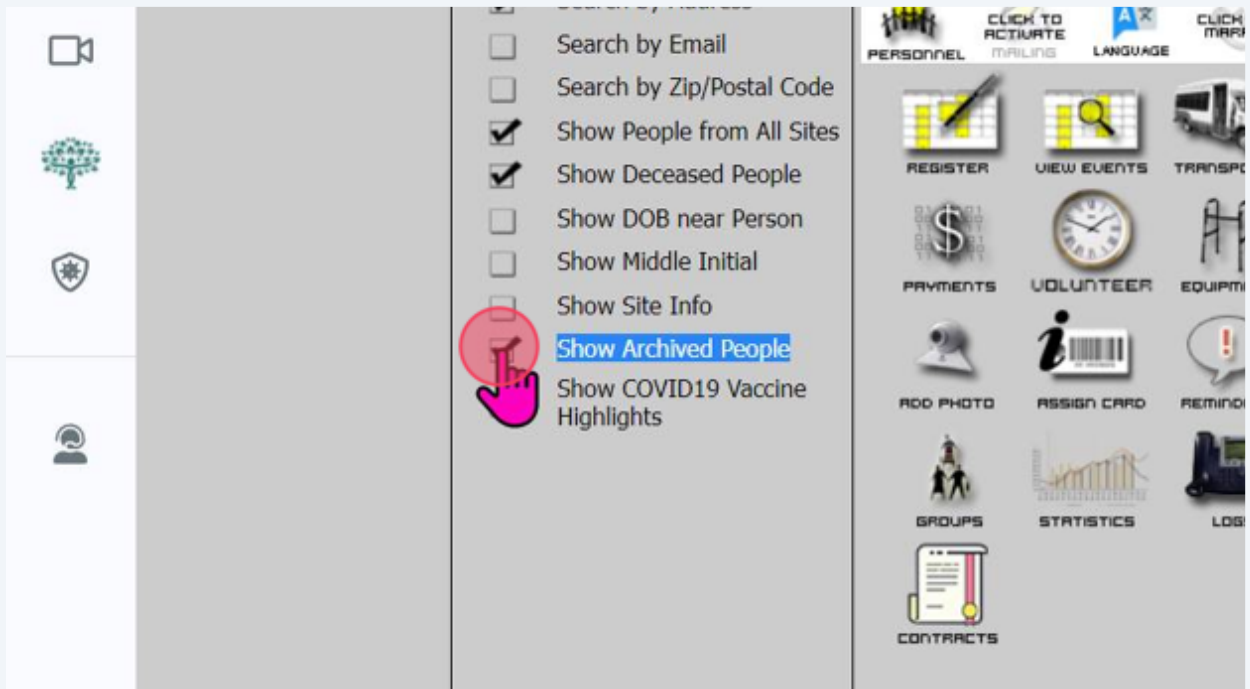
First Name	Last Name	Date of Birth
Sadie	Adams	5/25/1924

17

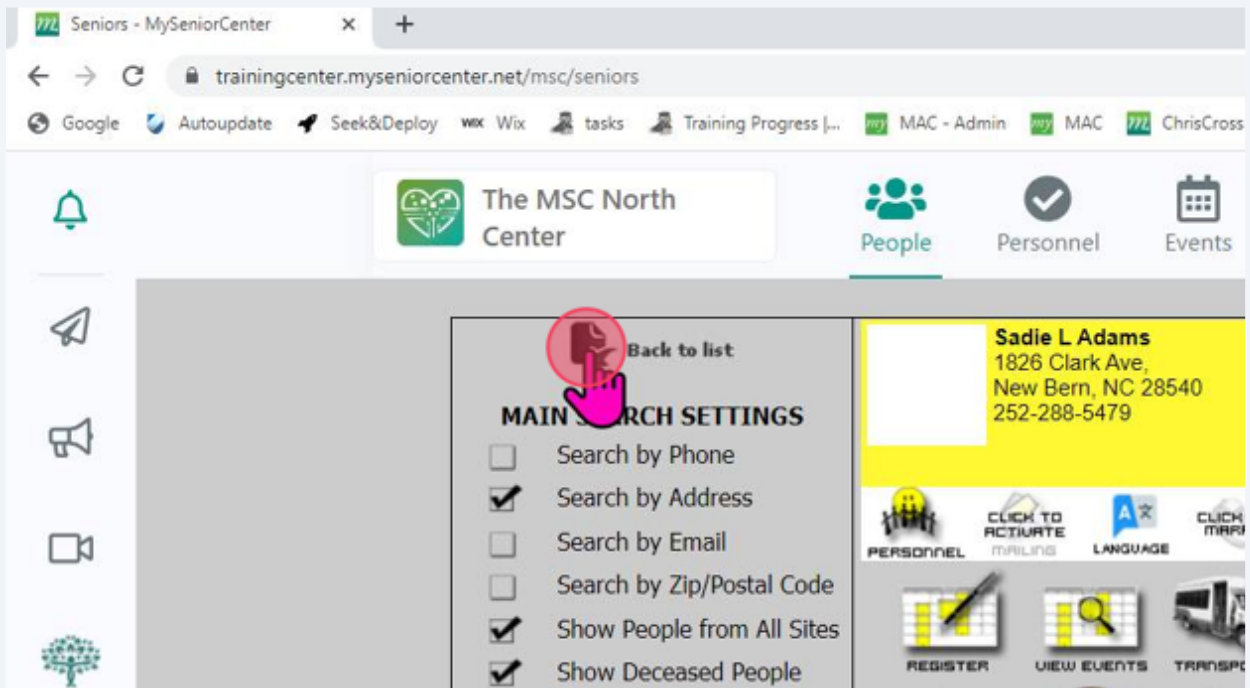
Now that the person is archived, click "Advanced" above the search box

The screenshot shows the MySeniorCenter web application. The 'People' tab is selected. A search box is at the top with a 'Show All' button and a 'Scan Card' button. A red circle highlights the 'Advanced' button above the search box. The main content area shows a list of people, with 'Adams, Sadie' highlighted in yellow. To the right, a detailed view for 'Sadie L. Adams' is shown, including her address and phone number. Below this, there are various icons for actions like Register, View Events, Transport, Traps, Payments, Volunteer, Equipment, Meals, Add Photo, Assign Card, Reminders, and Notes. A sidebar on the right contains 'Contacts', 'NOTES', and 'SERVICES' sections.

18 Here you can un-check "Show Archived People"

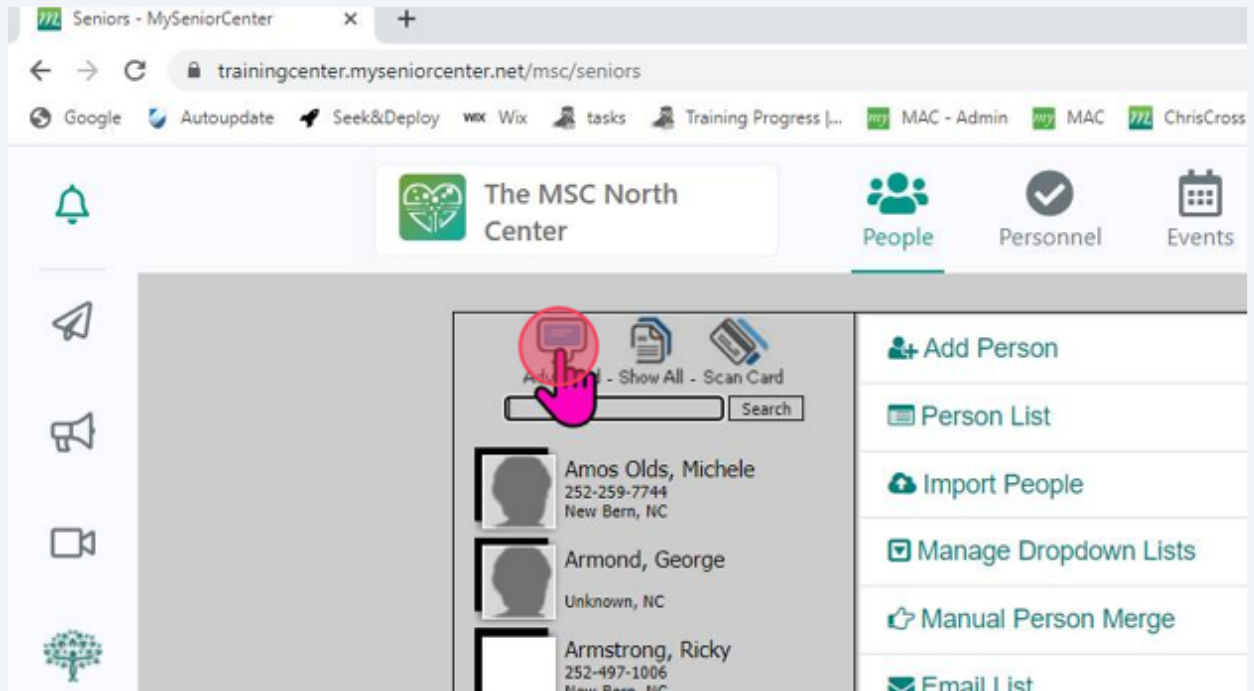


19 Click "Go Back to List"



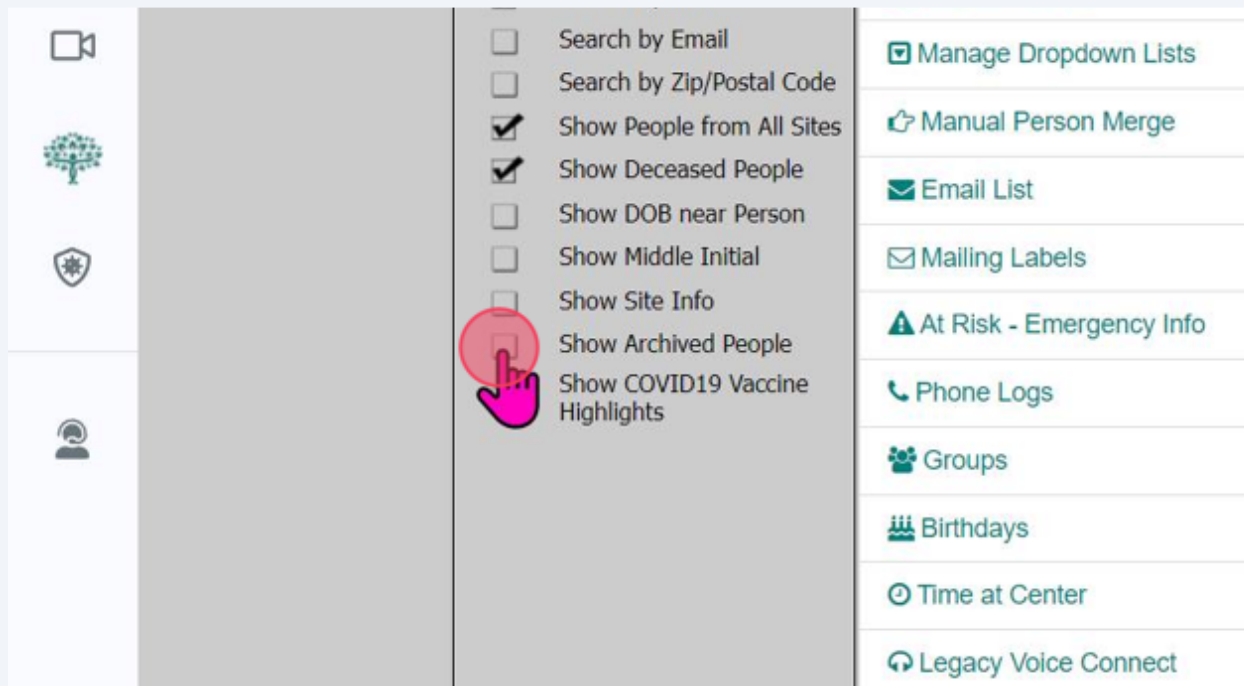
20

Now the person is hidden. They still exist and we have not lost anything. They are just hidden. Click "Advanced" above the search box again.

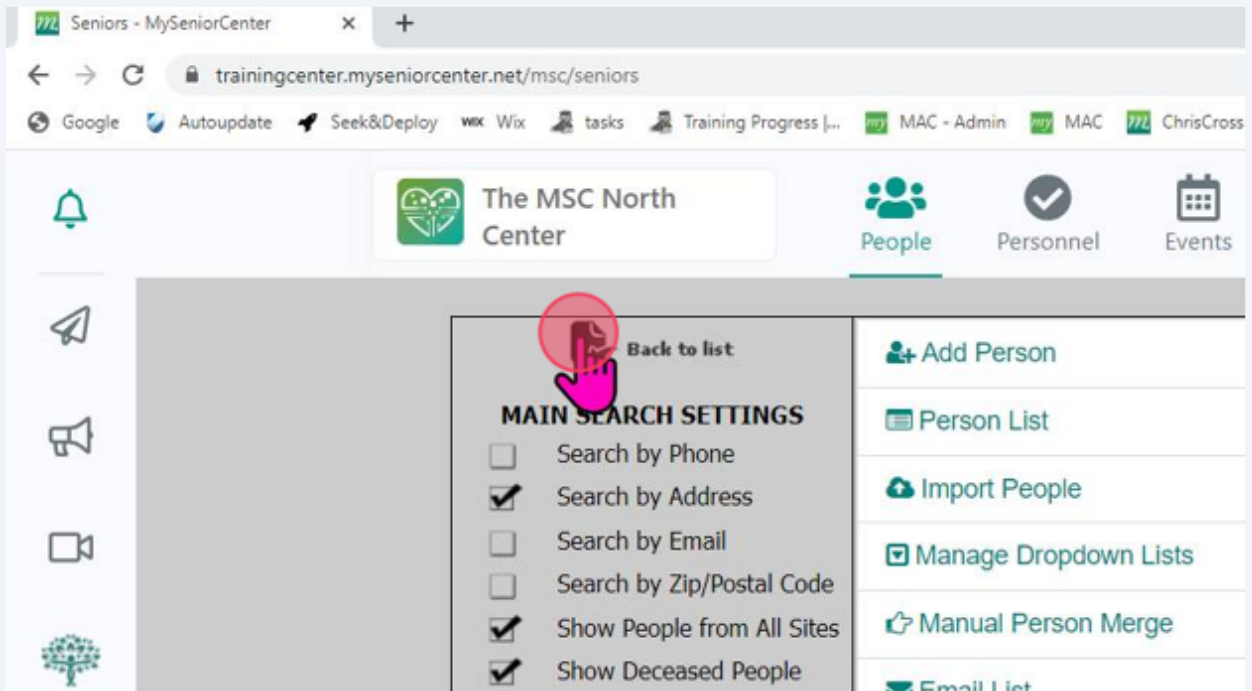


21

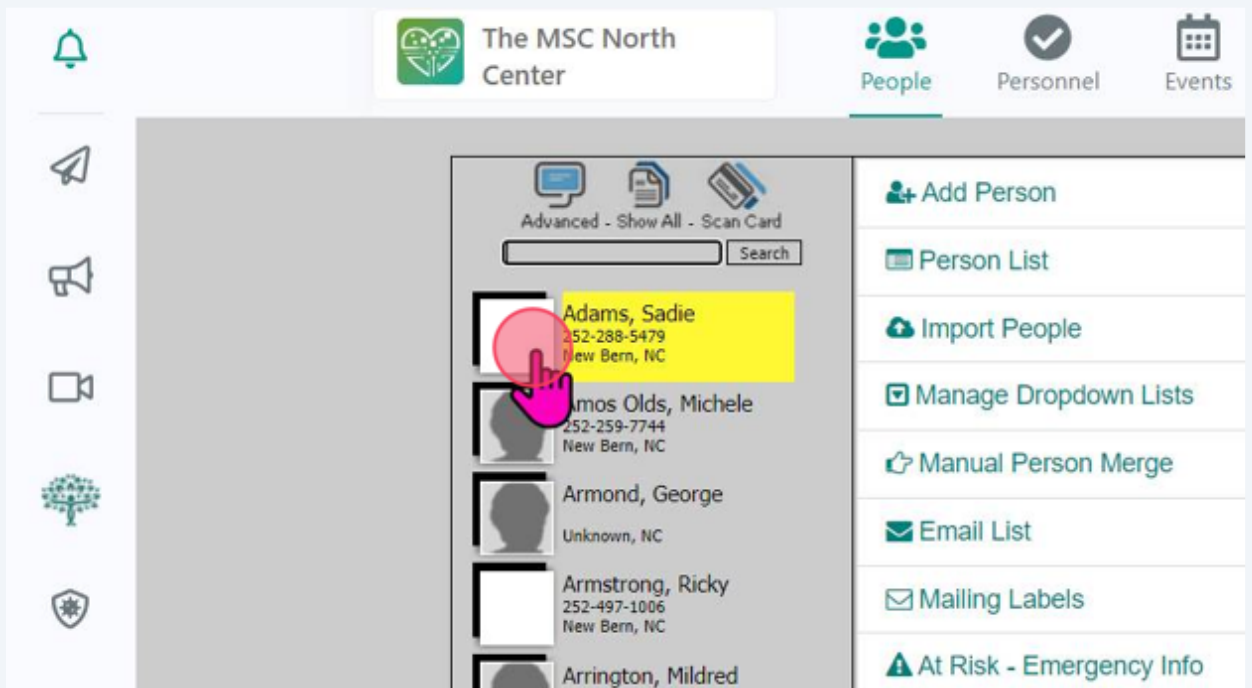
Here you can re-check the box



22 Click "Back to List"



23 The person show's back up in list. Click the person.



24 Click "File Info"

Navigation: People, Personnel, Events, Meals, Rides, Equipment, Reminders, Statistics

Personnel: Sadie L. Adams, Age: 99, 1826 Clark Ave, New Bern, NC 28540, 252-288-5479

Services Grid:

- PERSONNEL
- CLICK TO ACTIVATE MAILING
- LANGUAGE
- CLICK TO MARRY
- CUSTOM FILE INFO
- REGISTER
- VIEW EVENTS
- TRANSPORT...
- TRIPS
- PAYMENTS
- VOLUNTEER
- EQUIPMENT
- MEALS

Right Panel: Contacts (Add Contacts), NOTES (Add Note), SERVICES (Add Service)

25 Now the icon says Restore. Click "Restore"

Navigation: Rides, Equipment, Reminders, Statistics, Bill Henderson

Modal Navigation: GO BACK, FRAPIS, VIEW, CUSTOM, DELETE, RESTORE

Disabilities	none
	Add Remove
Allergies	none
	Add Remove
Identification Number	100002
Title	Please Select

26 The person's file is no longer archived and no longer highlighted yellow.

Navigation: People, Personnel, Events, Meals, Rides, Equipment, Reminders, Statistics

Sadie L Adams Age: 99
1826 Clark Ave,
New Bern, NC 28540
252-288-5479

PERSONNEL CLICK TO ACTIVATE MAILING LANGUAGE CLICK TO MARRY CUSTOM FILE INFO

REGISTER VIEW EVENTS TRANSPORT... TRIPS

PAYMENTS VOLUNTEER EQUIPMENT MEALS

CONTACTS Add Contacts

NOTES + CLICK HERE TO ADD NOTES

SERVICES + CLICK HERE TO ADD SERVICES

27 The deceased setting is similar to the archived setting. The date is not required. Change to Deceased to "Yes".

Navigation: Events, Meals, Rides, Equipment, Reminders, Statistics, Bill Henders

Language: English

Head of House Yes No

Deceased Yes No

Deceased Date

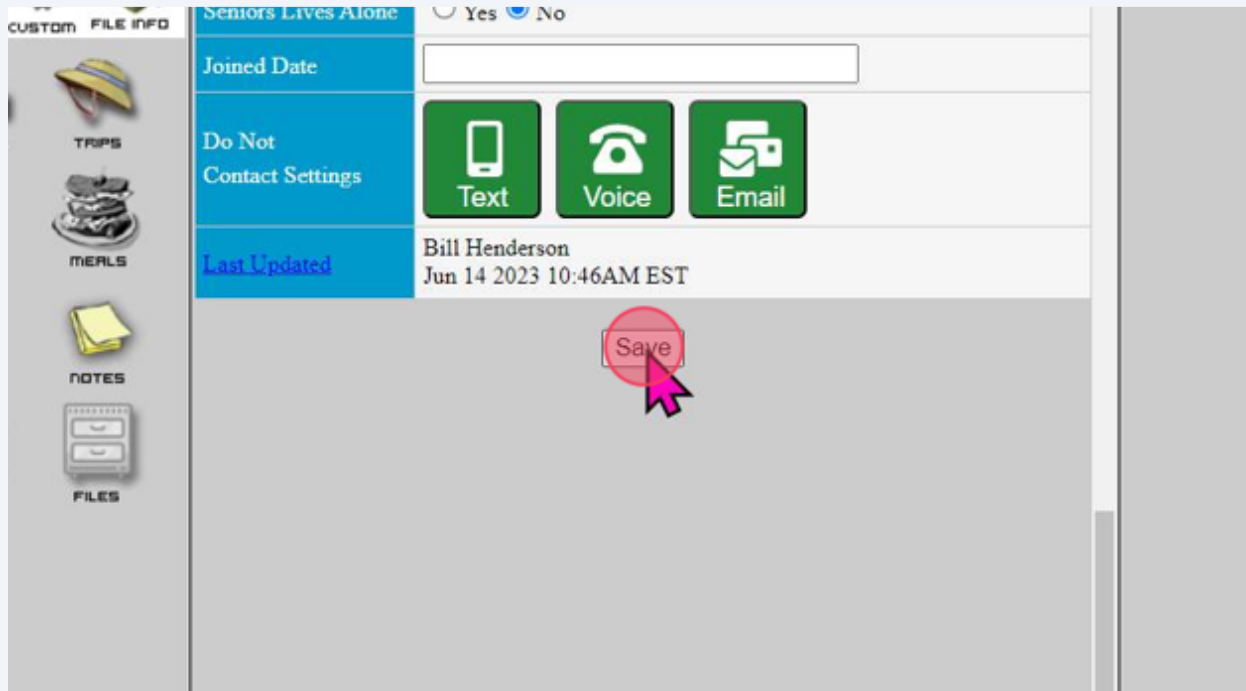
Seniors Lives Alone Yes No

Joined Date

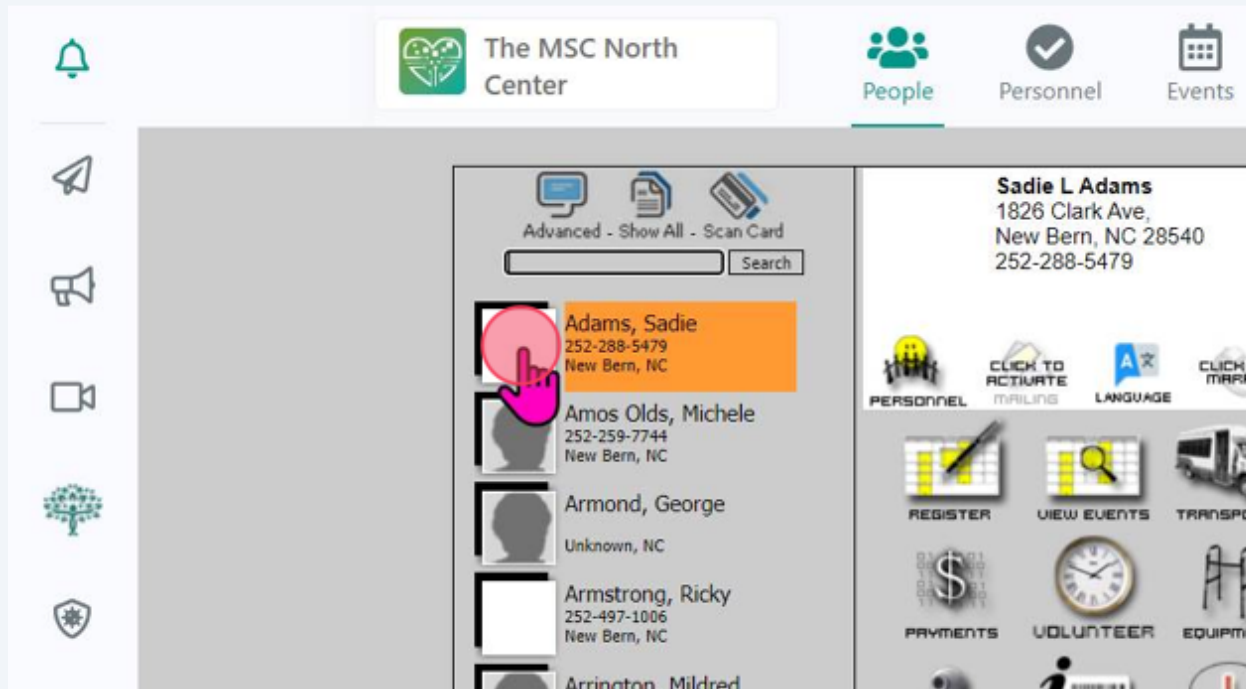
Do Not Contact Settings

Text Voice Email

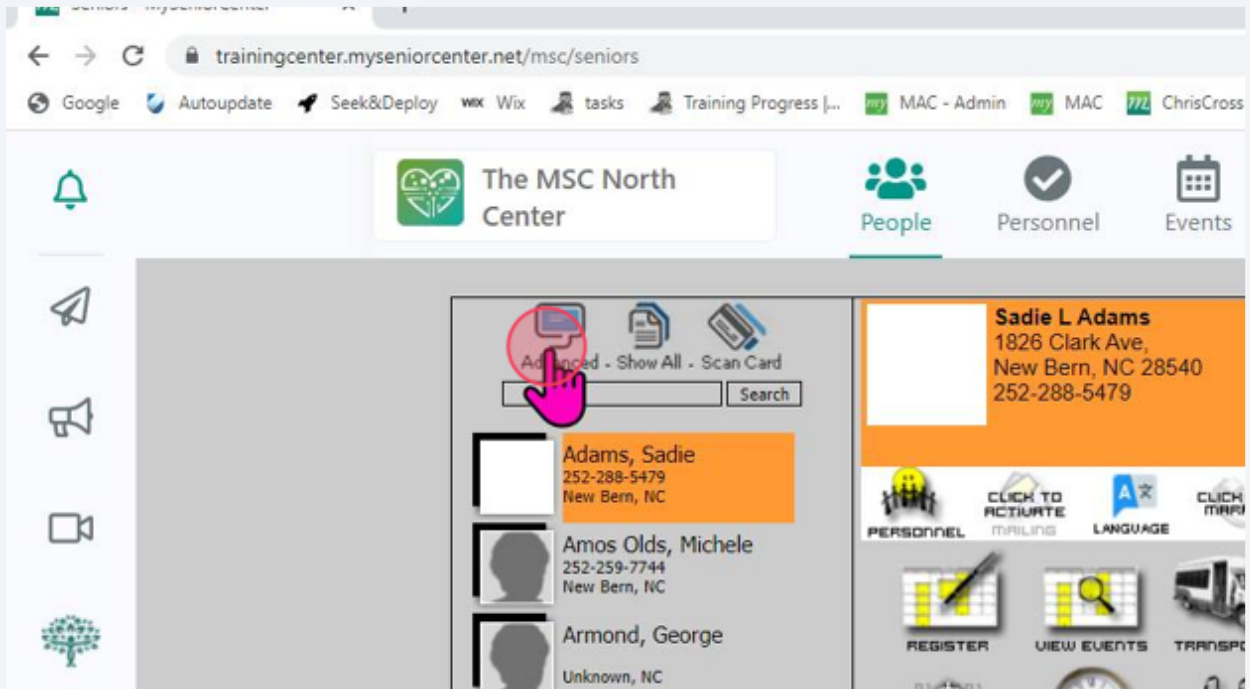
28 Click "Save"



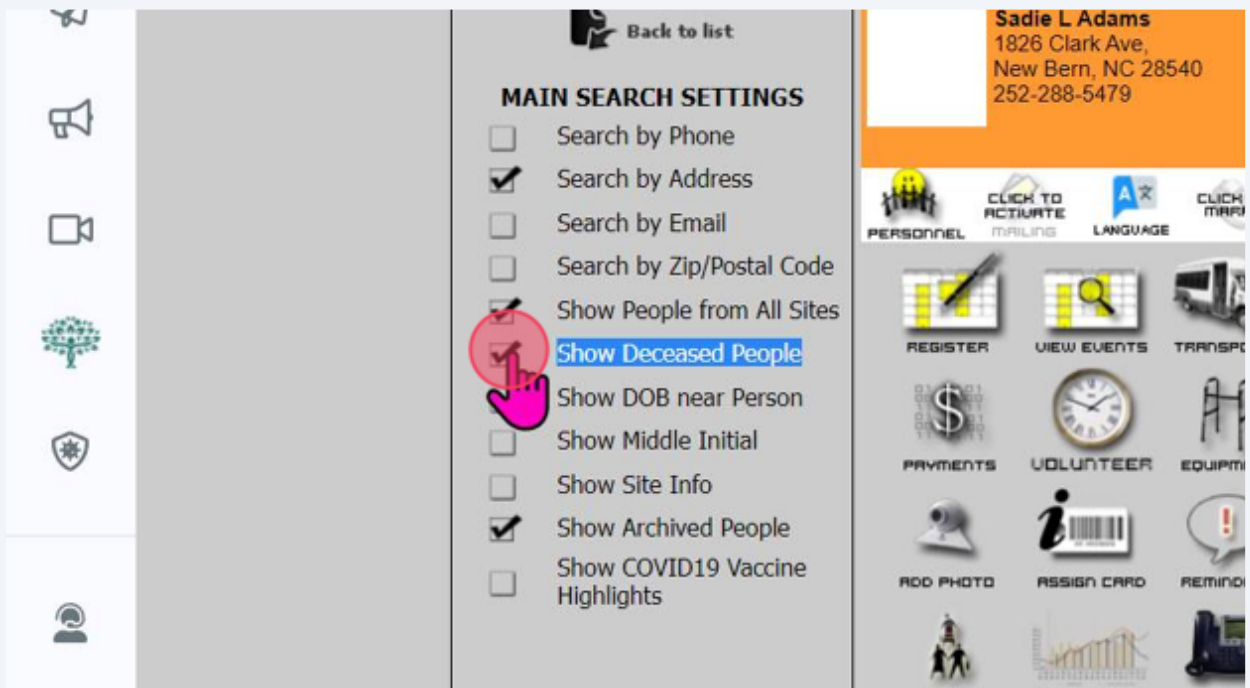
29 The person's file is highlighted orange. Orange means deceased.



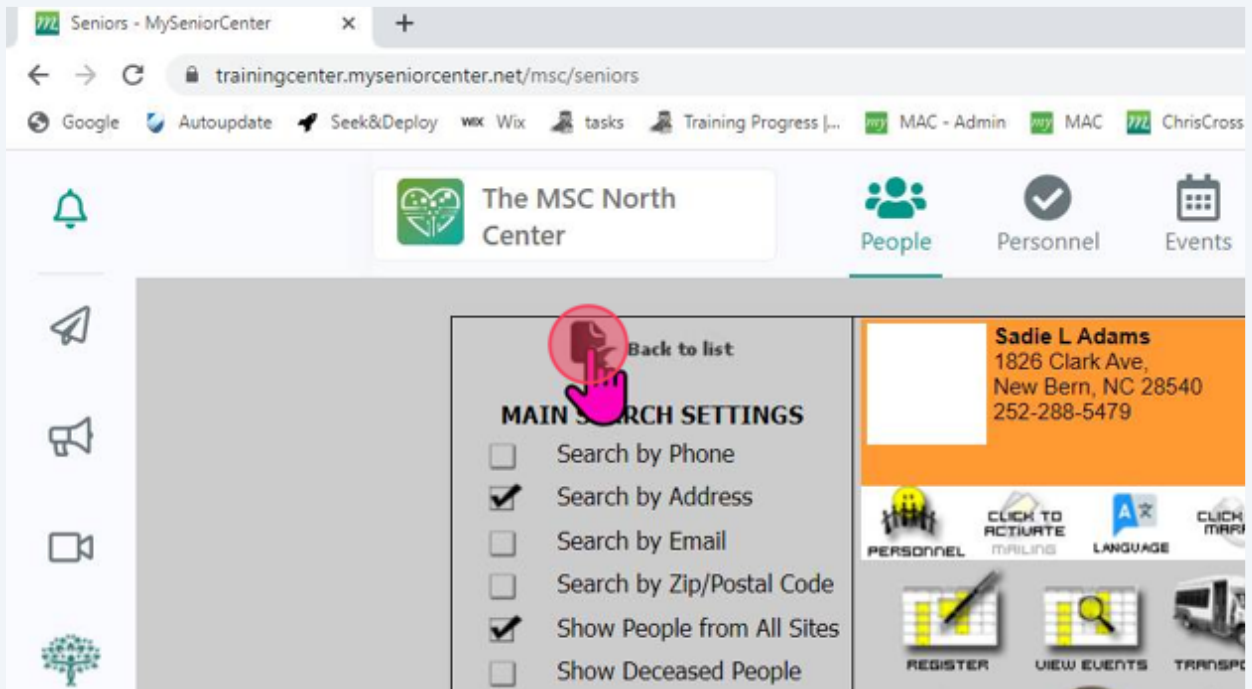
30 Click "Advanced" above the search box



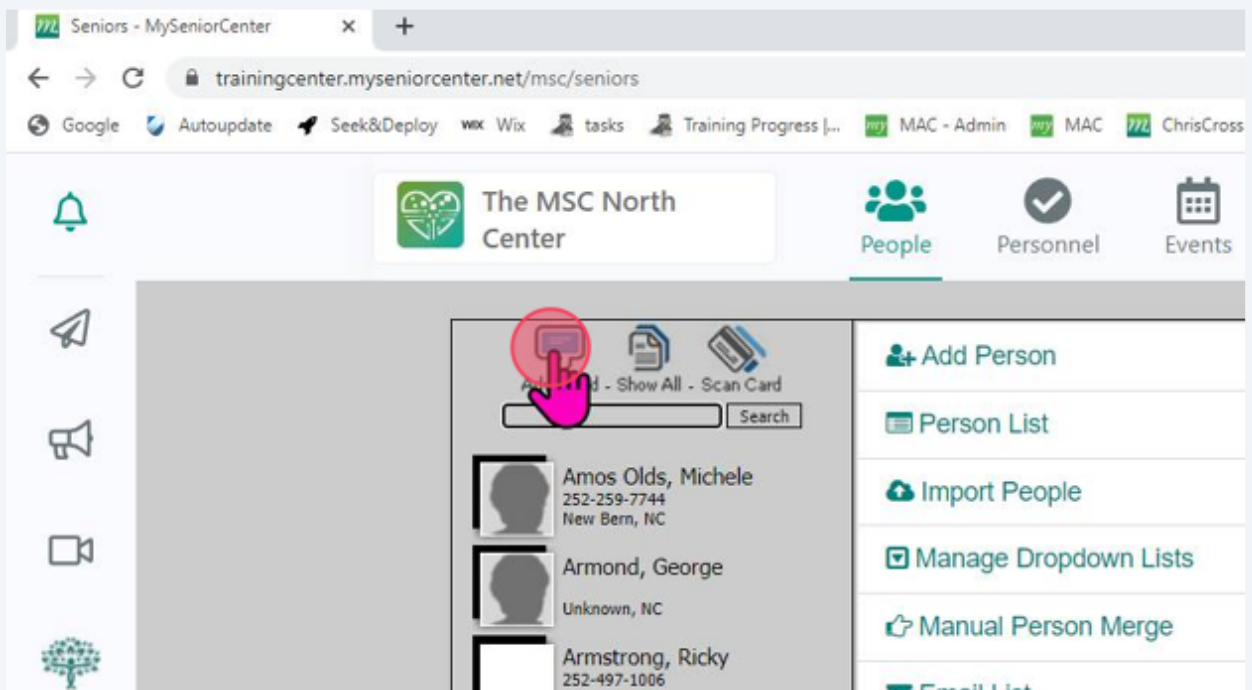
31 Just like with archiving, uncheck "Show Deceased People".



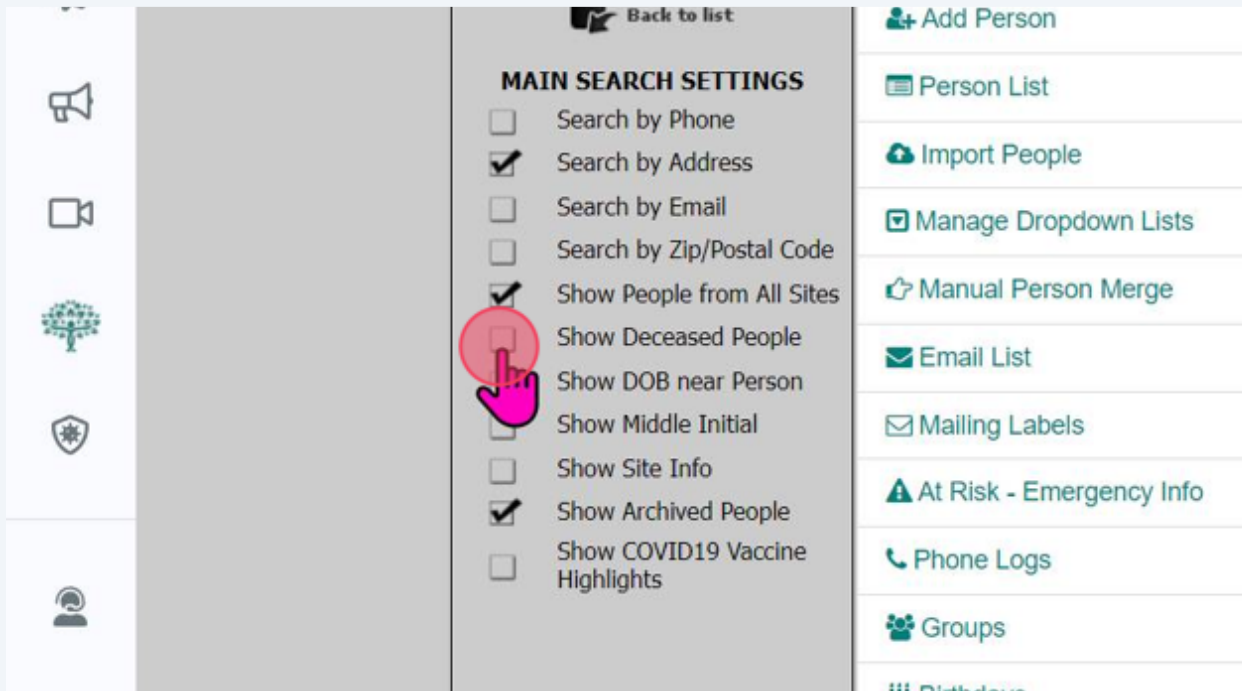
32 Click "Back to List"



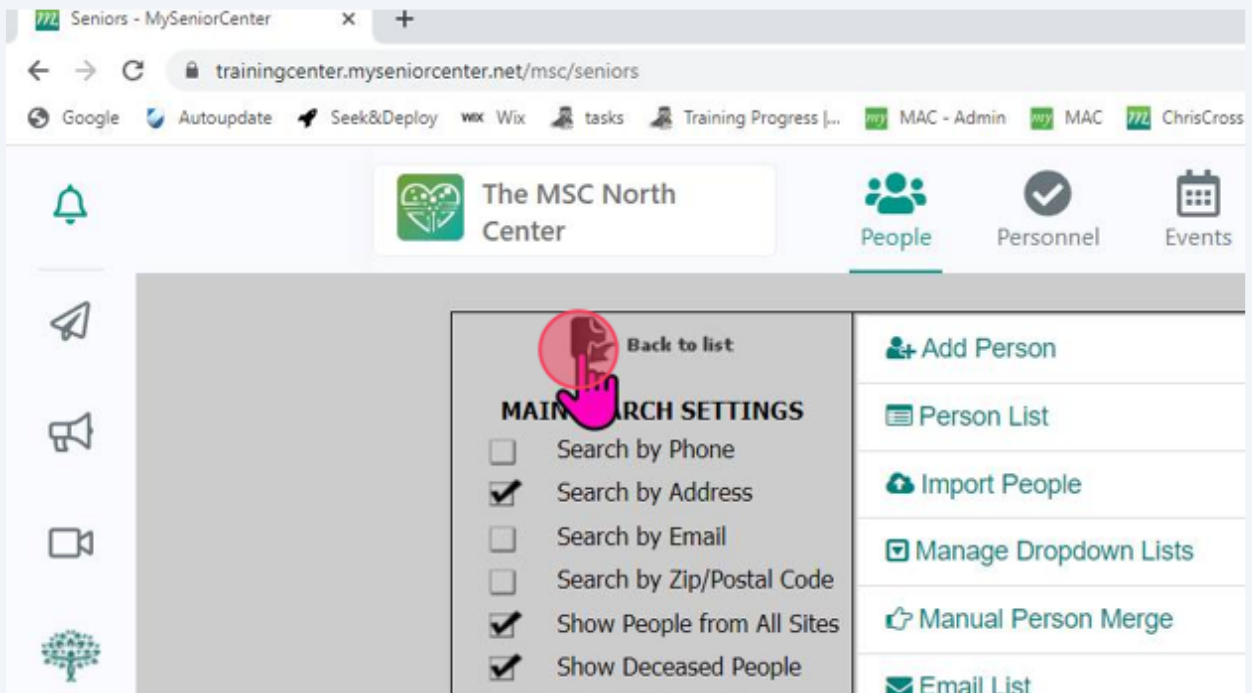
33 Deceased people are hidden from the list. Click "Advanced" above the search box.



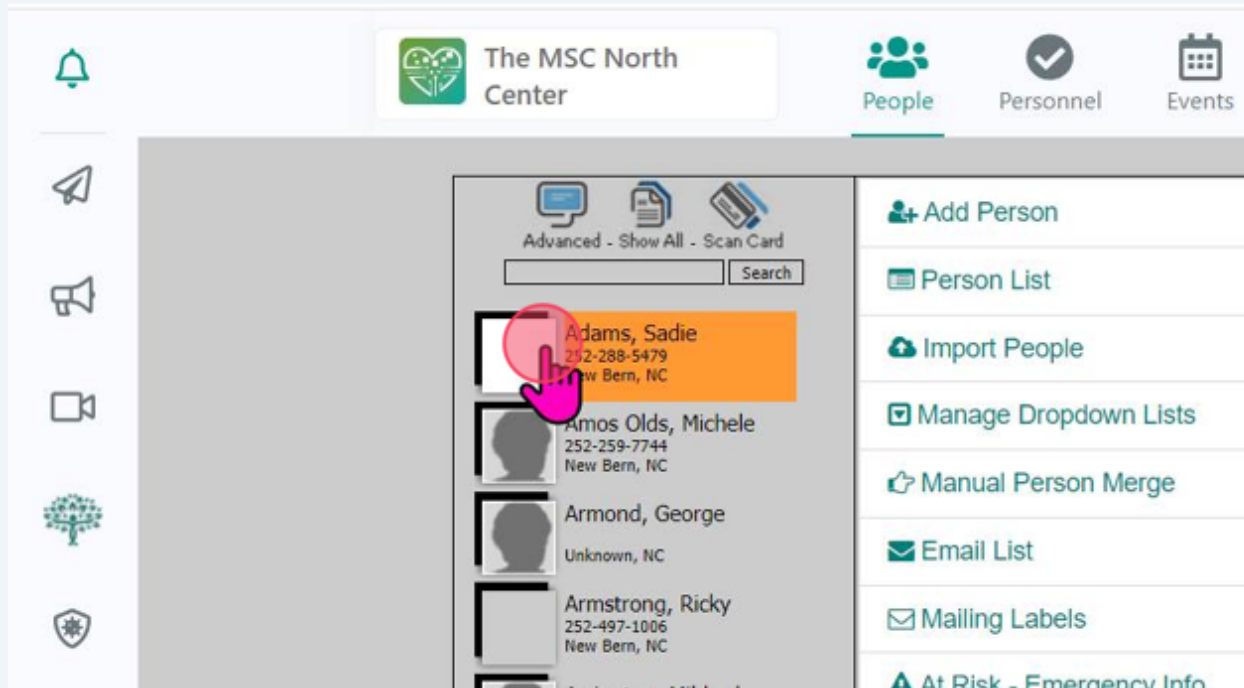
34 Re-check "Show Deceased"



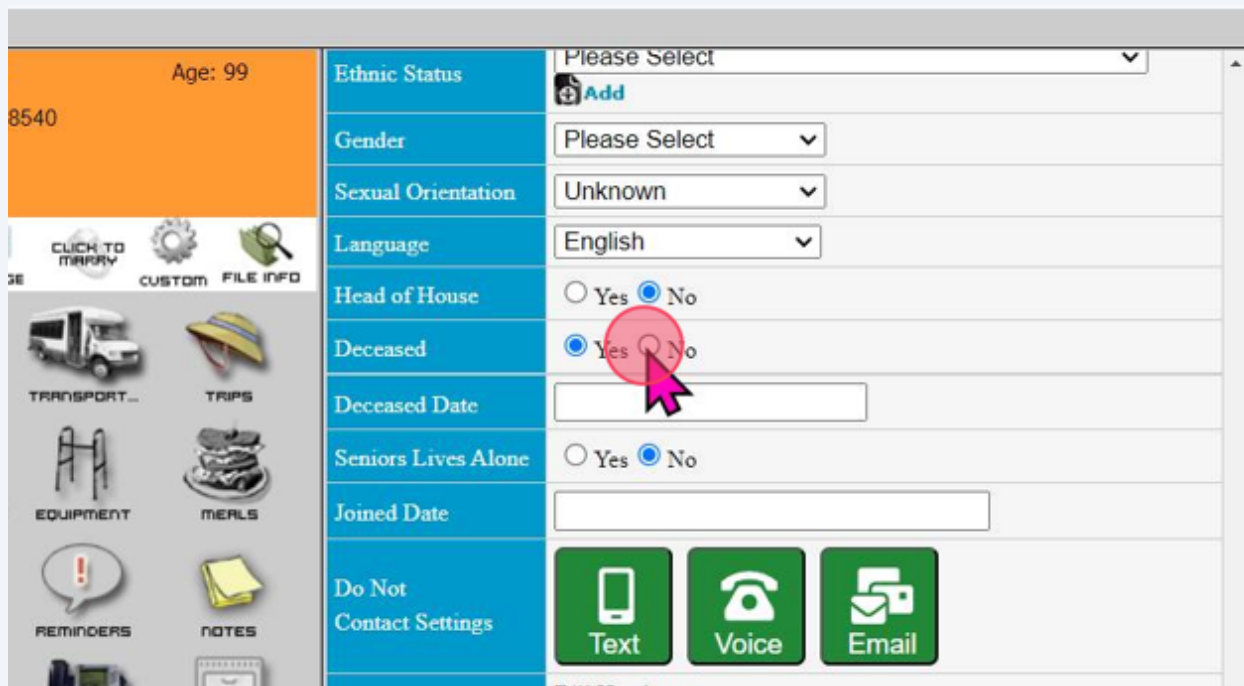
35 Click "Back to List"



36 Deceased People show back up again.



37 People do get set to deceased by accident from time to time. If this happens simply change deceased back to "No".



38 Click "Save"

Seniors Lives Alone	<input type="radio"/> Yes <input checked="" type="radio"/> No
Joined Date	<input type="text"/>
Do Not Contact Settings	<input type="button" value="Text"/> <input type="button" value="Voice"/> <input type="button" value="Email"/>
Last Updated	Bill Henderson Jun 16 2023 9:34AM EST



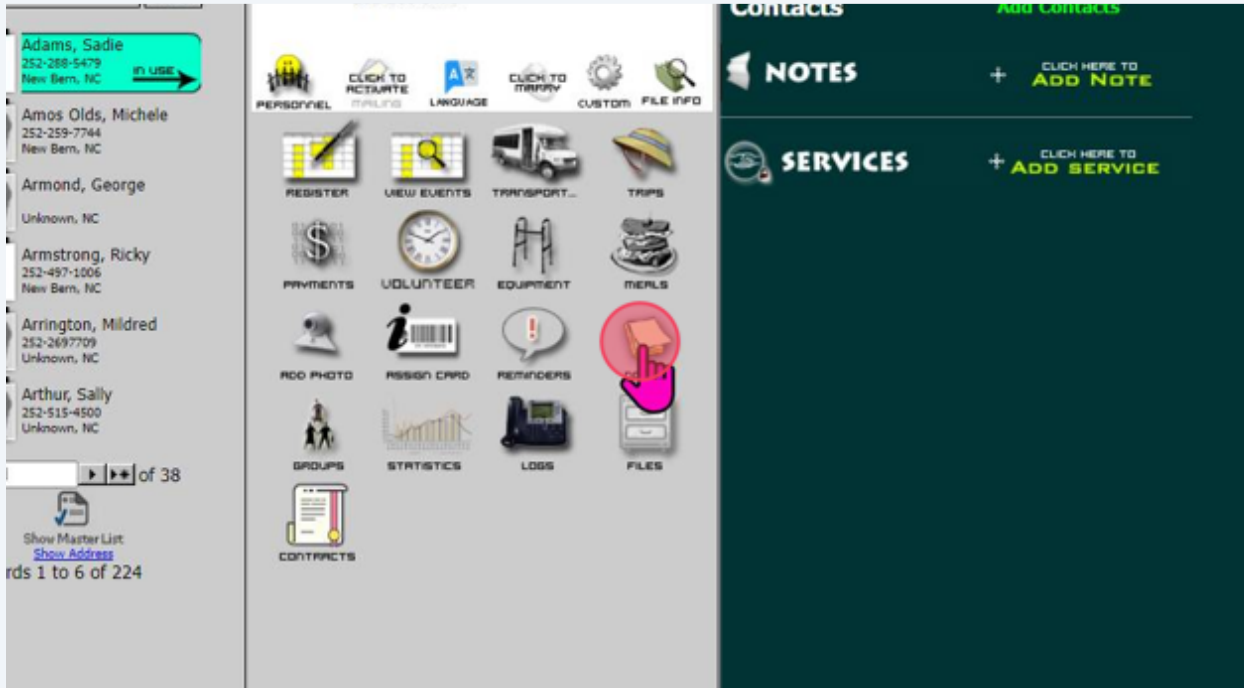
Both Archived and Deceased people are skipped in broadcasts. There are settings to include archived people if necessary but not deceased people. When you set a person to deceased, if they are pre-registered for any future events, they will be removed from those events as well as any groups they belong to.

The Sticky Notes Icon - Contacts, Notes and Services

Contacts

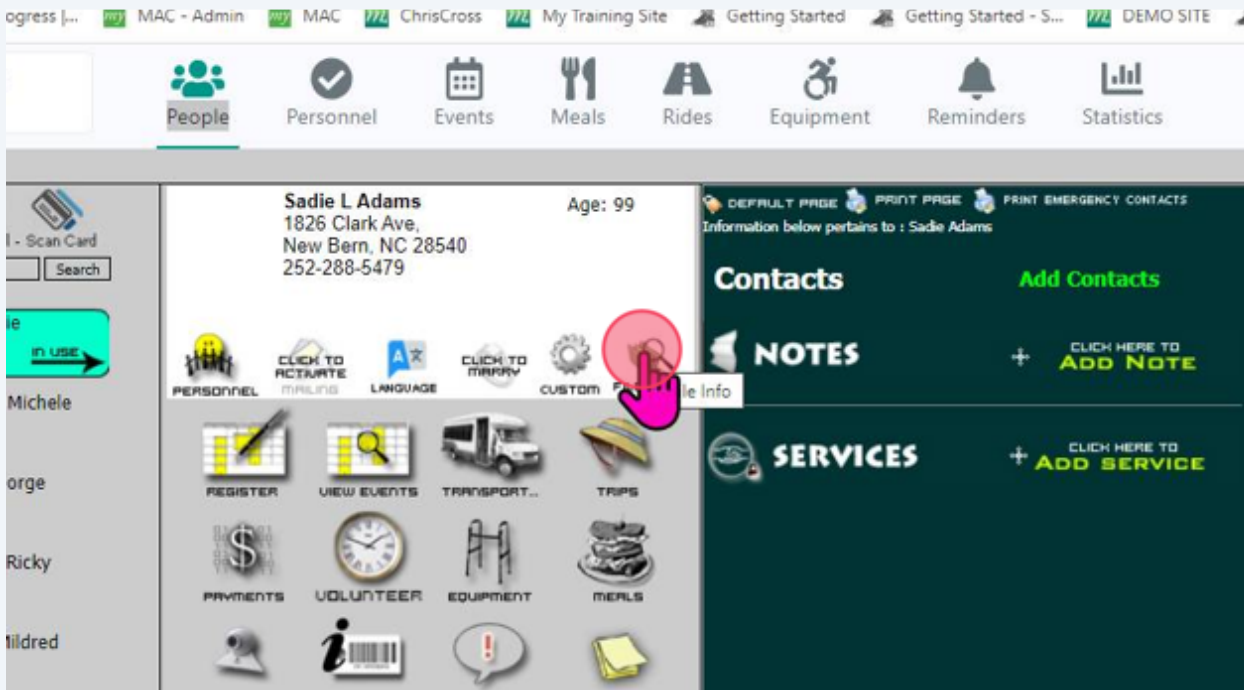
39

The sticky note icon is the default icon that's chosen when you 1st click on a person. The sticky notes icon brings up contacts notes and services.



40

Click "File Info"



41

When we created a new person we entered their primary contacts at that time. File info is where they live. That's where we would go if we needed to update them with any changes. Click the sticky note icon

A screenshot of a web application form for a person's profile. The form is divided into several sections, each with a blue header: 'Add Line 2', 'Meal/Mailing Route', 'P.O. Box', 'City' (with 'New Bern' entered), 'State / Province' (with 'NC' entered), 'Zip / Postal Code' (with '28540' entered), 'E-mail', 'Emergency Name' (with 'Andrea Malix' entered), 'Emergency Relation', 'Emergency Phone' (with '252-571-7673' entered), and 'Ethnic Status' (with 'Please Select' in a dropdown menu). A red circle with a white 'I' icon highlights the 'Emergency Name' field. On the left side of the form, there is a vertical navigation menu with icons for 'CUSTOM', 'FILE INFO', 'TRIPS', 'MEALS', 'NOTES', and 'FILES'. The 'NOTES' icon is a yellow sticky note.

42

The contacts under the sticky note icon are for any additional contacts you might have for this person. They could be more emergency contacts or they could be other types of contacts as well and you can add as many contacts as you like. Click add contact

A screenshot of a dashboard interface. At the top, there is a navigation bar with various icons and links: 'My Training Site', 'Getting Started', 'Getting Started - S...', 'DEMO SITE', 'mytutorialcenter', 'Work Email', and 'Barracuda N...'. Below this is a secondary navigation bar with icons for 'nts', 'Meals', 'Rides', 'Equipment', 'Reminders', and 'Statistics', along with a user profile for 'Bill Henderson'. The main content area is a dark green panel with the title 'Contacts' and the subtitle 'Information below pertains to : Sadie Adams'. It features three main sections: 'CONTACTS' with an 'Add Contacts' button, 'NOTES' with an 'Add Note' button, and 'SERVICES' with an 'Add Service' button. A red circle with a white 'I' icon highlights the 'Add Contacts' button. On the left side of the main panel, there is a vertical navigation menu with icons for 'CLICK TO TRAVEL', 'CUSTOM', 'FILE INFO', 'TRANSPORT...', 'TRIPS', 'EQUIPMENT', and 'MEALS'. The 'NOTES' icon is a yellow sticky note.

43 Click the type drop down and choose emergency

orID=100002&fp=GenContact

[Cancel](#)

Fill in as much information as needed then click Add below

Type	Please select a contact type ▾
Organization	Please select a contact type
First Name	Bill to
Last Name	Child
Relation	Emergency
Date of Birth	General
Email	Grandparent
Home	Hospital
Work	Midwife
Cell	Outreach
	Partner
	Parent/Guardian
	Physician
	Sibling

44 Fill in as much or as little information as you like about this contact. Nothing is required.

center.myseniorcenter.net/legacy/manage_seniors_contact_add.asp?SeniorID=100002&fp=GenContact

[Cancel](#)

Fill in as much information as needed then click Add below

Type	Emergency
Organization	
First Name	Jack
Last Name	Johnson
Relation	
Date of Birth	yy/mm/xxxx
Email	
Home	455-141-7821
Work	
Cell	
Address	
Address 2	
City	
State / Province	
Zip / Postal Code	

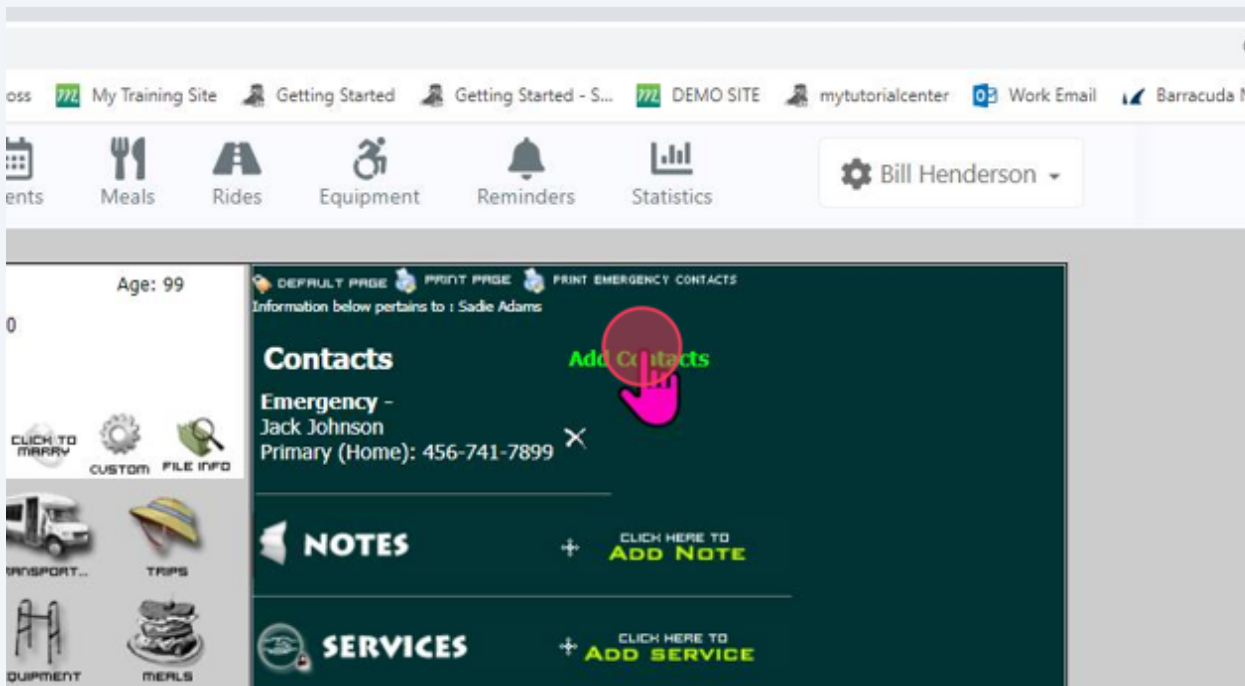
[ADD](#)

45 Click "ADD"



A screenshot of a contact form with the following fields: Cell, Address, Address 2, City, State / Province, and Zip / Postal Code. Each field is a white input box with a blue header. Below the fields is a red circular button with the word "ADD" in white, and a pink mouse cursor pointing at it.

46 Now we can see that contact listed there. Let's create another contact. Click add contact.



A screenshot of a user interface showing a contact list. The top navigation bar includes "My Training Site", "Getting Started", "DEMO SITE", "mytutorialcenter", "Work Email", and "Barracuda". Below the navigation bar are icons for "Meals", "Rides", "Equipment", "Reminders", and "Statistics". The main content area shows a contact card for "Sadie Adams" with the following details: "Age: 99", "Emergency - Jack Johnson", "Primary (Home): 456-741-7899". There are buttons for "Add Contacts", "Notes", and "Services". A pink mouse cursor is pointing at the "Add Contacts" button.

47

This time let's create a general contact. Fill in as much or as little information as you like.

niorID=100002&fp=GenContact

[Cancel](#)

Fill in as much information as needed
then click Add below

Type	Please select a contact type ▼
Organization	Please select a contact type
First Name	Bill to
Last Name	Child
Relation	Emergency
Date of Birth	General
Email	Grandparent
Home	Hospital
Work	Midwife
Cell	Outreach
Address	Partner
	Parent/Guardian
	Physician
	Sibling

48

Click "ADD"

Cell	
Address	
Address 2	
City	
State / Province	
Zip / Postal Code	

[ADD](#)

49

Now we can see the 2nd contact listed there. If you have an emergency situation you do not have to go digging around into the different areas. As soon as you find the individual whose contacts you need, click print emergency contacts to the right above the contacts.

The screenshot shows a web application interface. At the top, there is a navigation bar with several tabs: 'Cross', 'My Training Site', 'Getting Started', 'Getting Started - S...', 'DEMO SITE', 'mytutorialcenter', 'Work Email', and 'Barracuda'. Below this is a secondary navigation bar with icons for 'vents', 'Meals', 'Rides', 'Equipment', 'Reminders', and 'Statistics', along with a user profile for 'Bill Henderson'. The main content area displays information for 'Sadie Adams', including 'Age: 99'. A section titled 'Contacts' lists two entries: 'Emergency - Jack Johnson' with 'Primary (Home): 456-741-7899' and 'General - Zelda' with 'Primary (Home): 852-963-7894'. Above the 'Emergency' contact, there are several buttons: 'DEFAULT PRGE', 'PRINT PRGE', 'PRINT EMERGENCY CONTACTS', and 'CONTACTS'. A red circle with a hand cursor is positioned over the 'PRINT EMERGENCY CONTACTS' button. To the left of the contact list, there are icons for 'CLICK TO ENRICH', 'CUSTOM', 'FILE INFO', 'TRANSPORT...', and 'TRIPS'. At the bottom of the contact list, there is a 'NOTES' section with a '+ CLICK HERE TO ADD NOTE' button.

50

This will grab their primary contact from file info along with any other emergency types we create. Here. You can see Zelda is not listed because Zelda is a general contact not an emergency contact.

Sadie Adams
Age: 99 Dob:(5/25/1924)
1826 Clark Ave,
New Bern, NC28540
Phone:252-288-5479
Cell Phone:
Disabilities/Allergies:
Emergency Contacts
Andrea Malix
Home: 252-571-7673
Jack Johnson
Home: 456-741-7899

Equipment Reminders

DEFPULT PRIGE PRINT PRIGE PRINT
Information below pertains to : Sadie Adams

Contacts

Emergency -
Jack Johnson
Primary (Home): 456-741-7899

General -
Zelda
Primary (Home): 852-963-7894

NOTES +

SERVICES +

51

Click "Close"

Getting Started Getting Started - S... DEMO SITE

Equipment Reminders Statistics

DEFPULT PRIGE PRINT PRIGE PRINT EMERGENCY CONTACTS
Information below pertains to : Sadie Adams

Contacts Add Contacts

Emergency -
Jack Johnson
Primary (Home): 456-741-7899

General -
Zelda
Primary (Home): 852-963-7894

NOTES + CLICK HERE TO APP NOTE

52 If you need to update one of these contacts, click on it.

People Personnel Events Meals Rides Equipment Reminders Statistics

Sadie L Adams Age: 99
1826 Clark Ave.
New Bern, NC 28540
252-288-5479

PERSONNEL CLICK TO ACTIVATE MAILING LANGUAGE CLICK TO MODIFY CUSTOM FILE INFO

REGISTER VIEW EVENTS TRANSPORT... TRIPS

PAYMENTS VOLUNTEER EQUIPMENT MEALS

ADD PHOTO ASSIGN CARD REMINDERS NOTES

DEFPULT PAGE PRINT PAGE PRINT EMERGENCY CONTACTS
Information below pertains to : Sadie Adams

Contacts Add Contacts

Emergency -
Jack Johnson
Primary (Home): 456-741-7899

Gen.
Zelda
Primary (Home): 852-963-7894

NOTES + CLICK HERE TO ADD NOTE

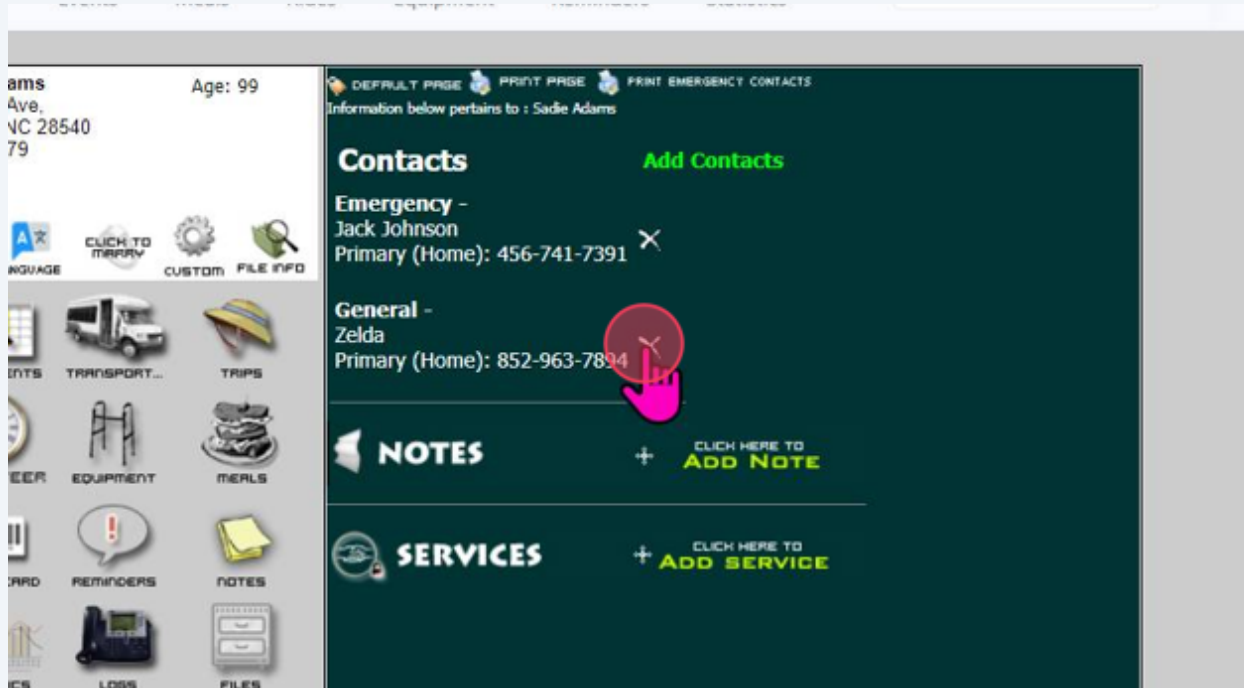
SERVICES + CLICK HERE TO ADD SERVICE

53 Make any changes needed then click "Edit"

Work	<input type="text"/>
Cell	<input type="text"/>
Address	<input type="text"/>
Address 2	<input type="text"/>
City	<input type="text"/>
State / Province	<input type="text"/>
Zip / Postal Code	<input type="text"/>

Edit

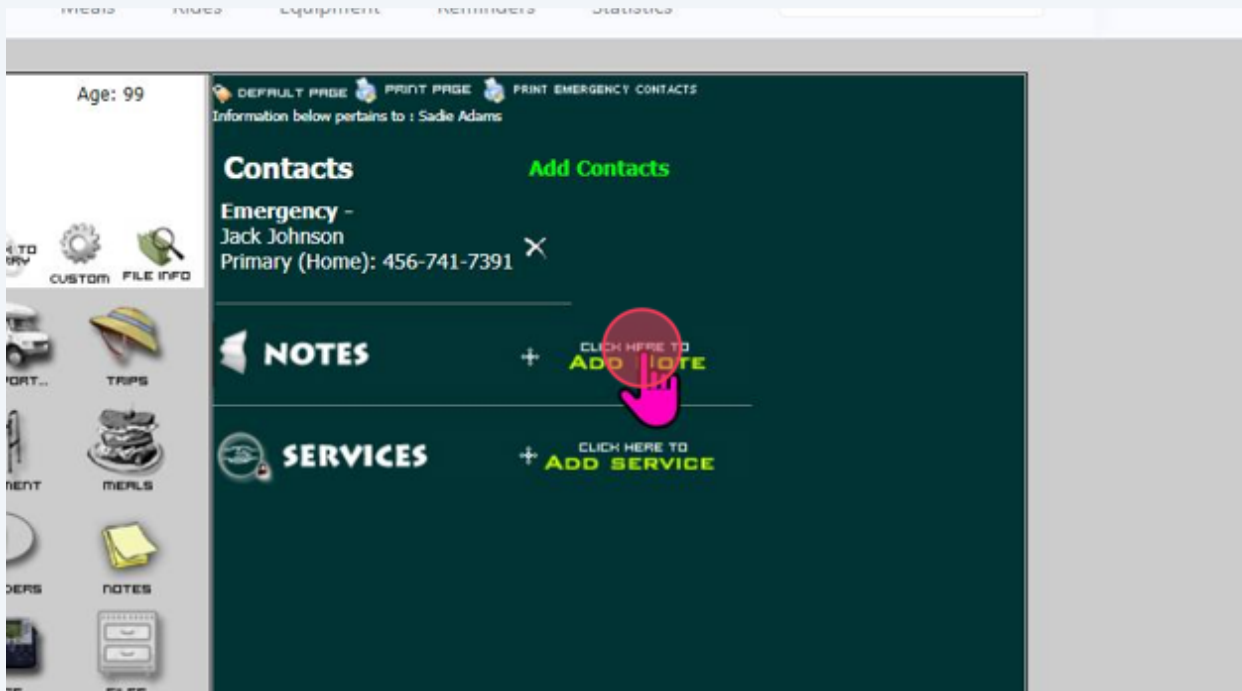
54 If you need to remove a contact, click the white X



Notes

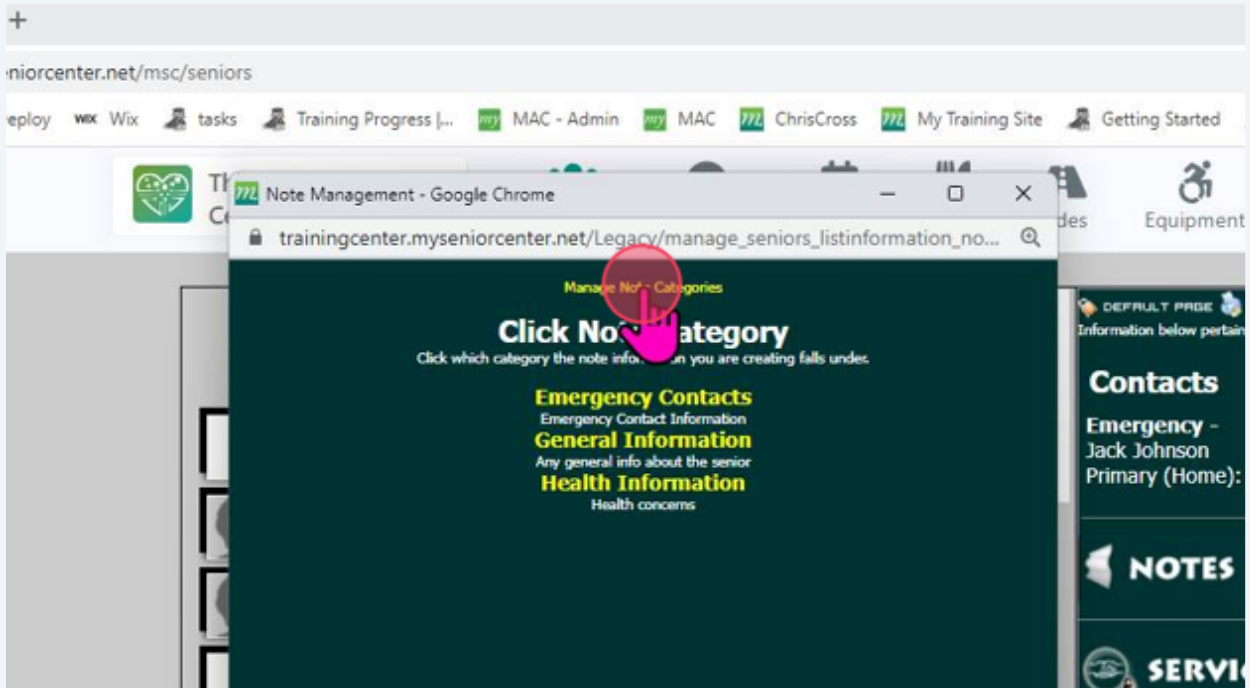
55

Notes are meant to be very general notes about the person. These notes are not meant for anything confidential or anything service related. We'll learn about those kinds of notes next. These notes are available to all staff members. There is no way to lock anybody out of these notes. When one of you puts in a note the rest of you will see the note as well and you'll also be able to see who put that note in along with the date. Notes do not provide any sort of reporting at all. That's just not what they're intended for. They're meant to be seen in MSC when you're looking at that person's file. Click "Add Note".



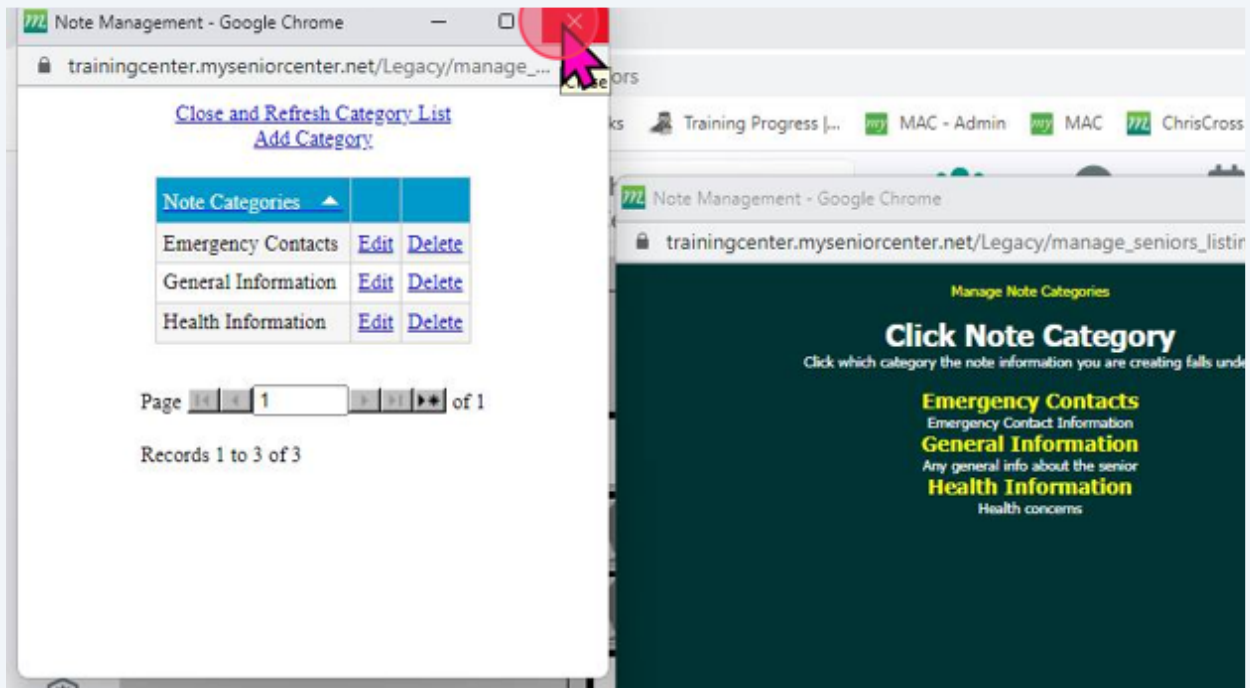
56

In the pop-up window you will choose a category. If you need to add/edit or delete choices from the category list, click "Manage Note Categories".

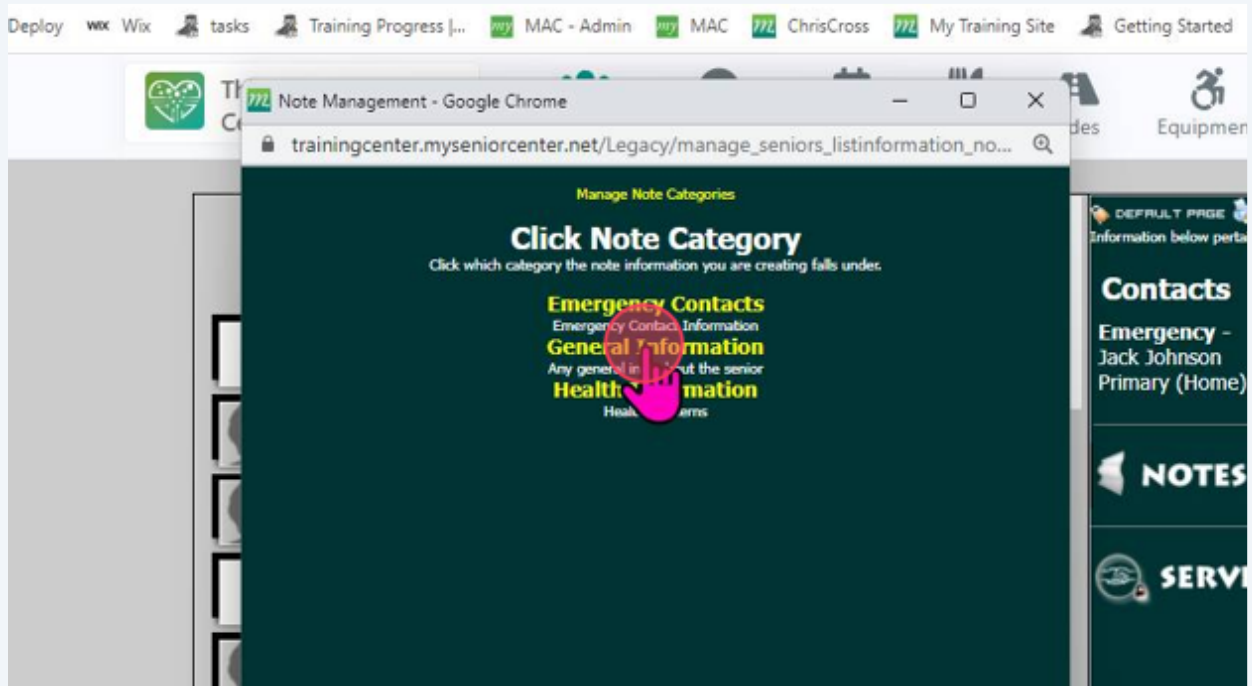


57

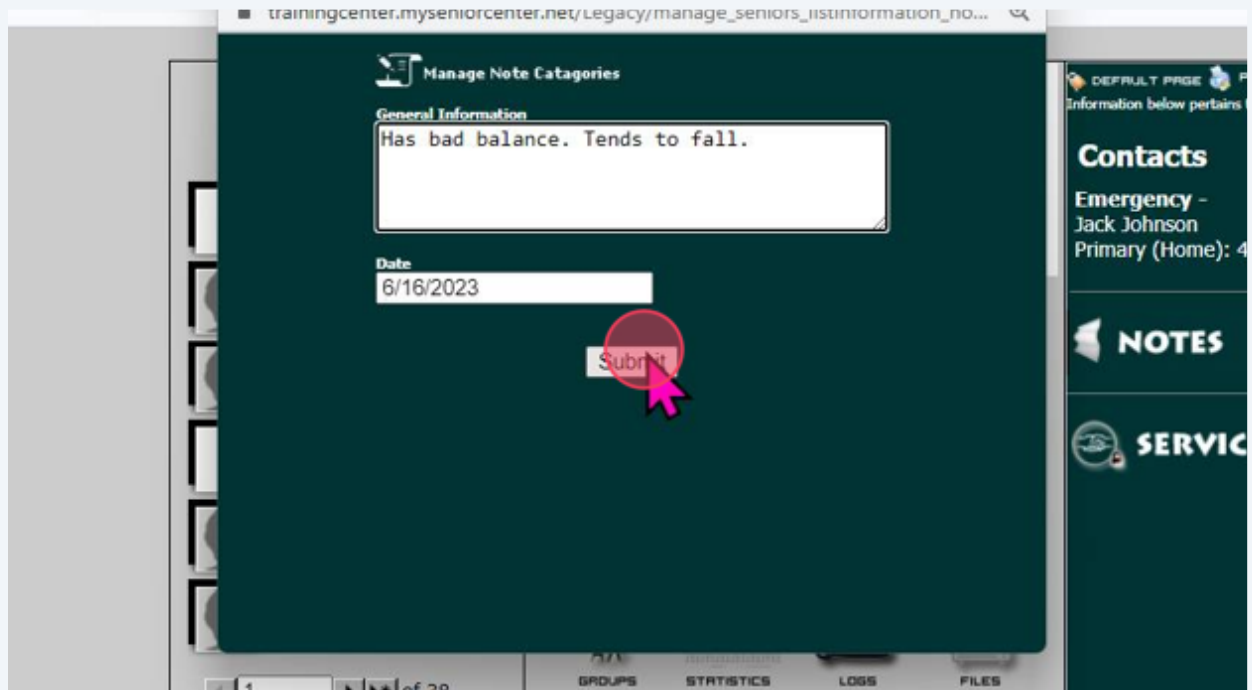
In the separate pop-up window you customize the list of categories. Close the window.



58 When putting in a note simply click a Category.

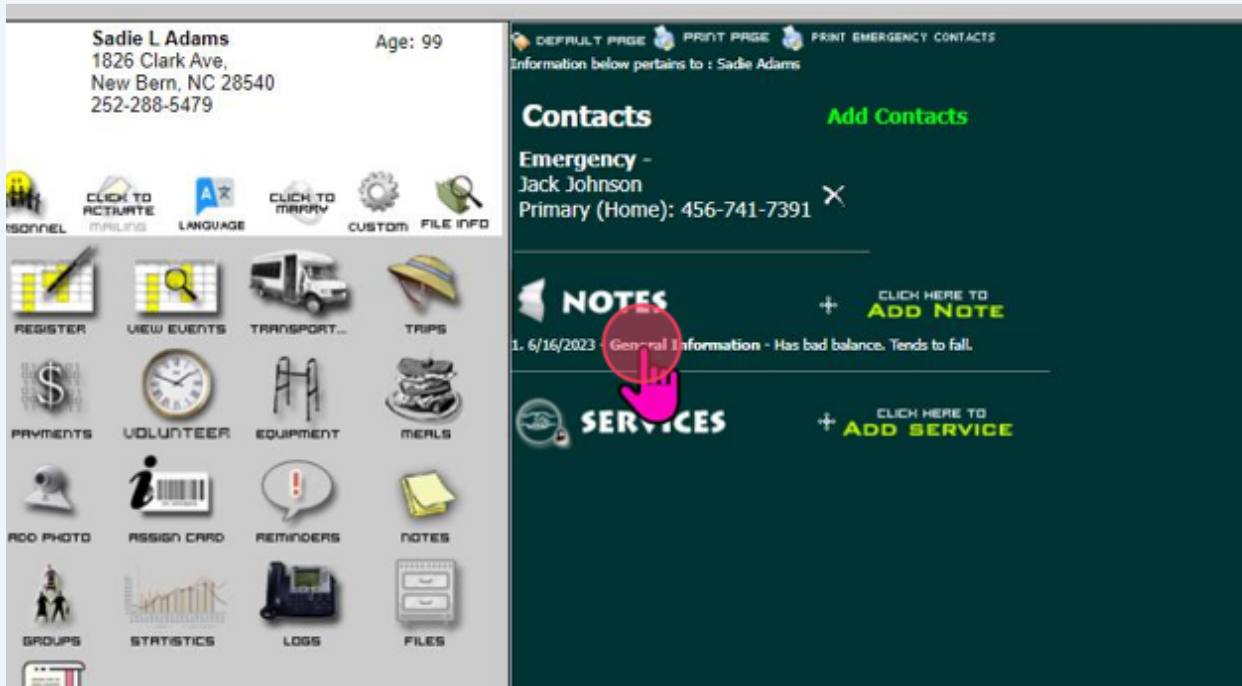


59 Type your note and click "Submit".



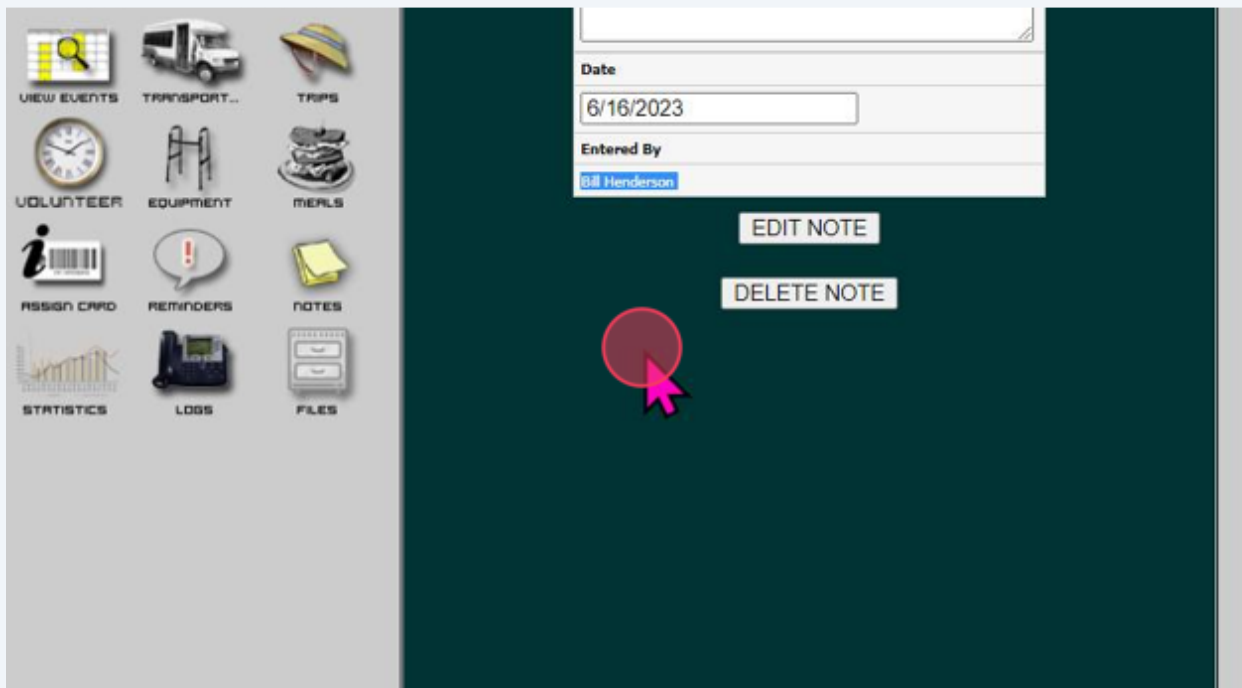
60

Now you can see that note listed there along with the date. Click on the note.



61

Here you can see who entered the note.



62 Click on the "Sticky Note Icon".

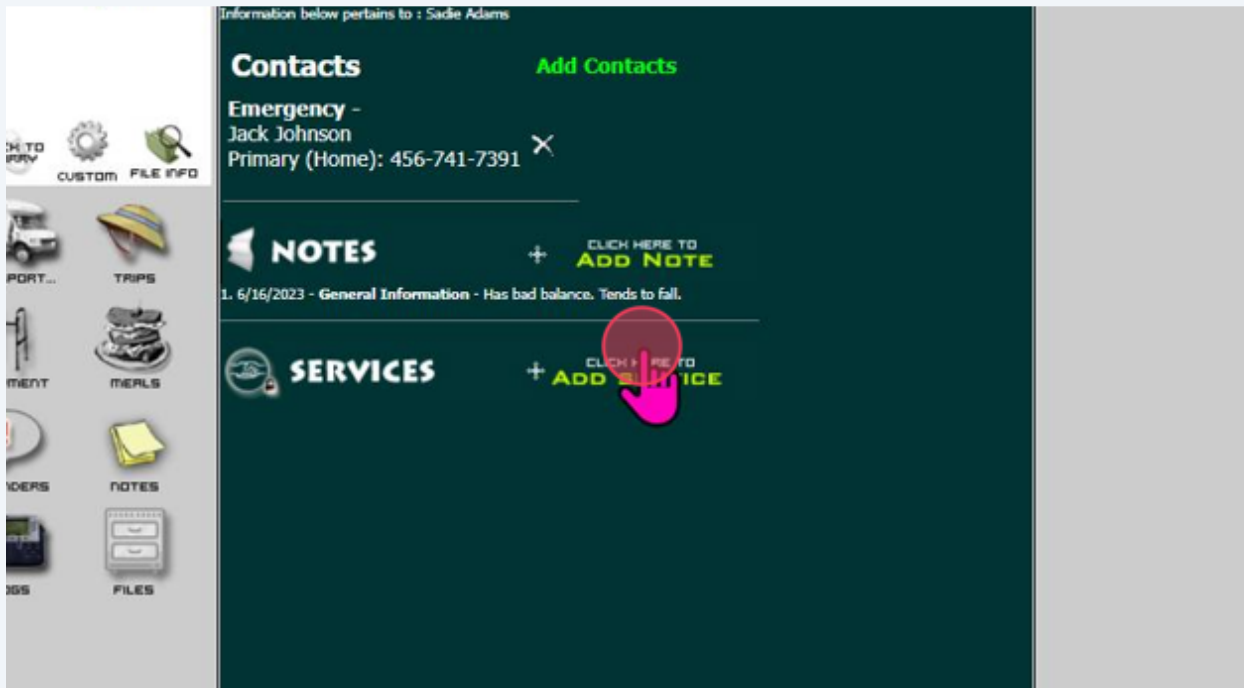
The screenshot displays a software interface with a central menu of icons and a note editing window on the right. The menu includes icons for PERSONNEL, REGISTER, VIEW EVENTS, TRANSPORT..., TRIPS, PAYMENTS, VOLUNTEER, EQUIPMENT, MERLS, ADD PHOTO, ASSIGN CARD, REMINDERS, FILES, GROUPS, STATISTICS, LOGS, and CONTRACTS. A pink hand cursor is pointing at the 'FILES' icon. The right window shows a note with the text 'Has bad balance. Tends to f...', a date field containing '6/16/2023', and an 'Entered By' field containing 'Bill Henderson'. Below the note are 'EDIT NOTE' and 'DELETE NOTE' buttons.

Services/Outreach

63

Services is designed for more confidential case notes that service providers are entering that not everybody at your organization should be able to see. Outreach Workers use it, Social Service Providers use it, Nurses use it, it depends on each center and who they have working there. But the main point is that you are able to decide who has access and who does not. Whenever any staff member gets their user name/login set up, an admin has to choose their permissions. During that process they are deciding whether or not you have access to the services section. If you have access you see the services section there and you can see past records as well as add new records and run reports. If you do not have access then you simply do not see the services section at all and it just doesn't exist for you.

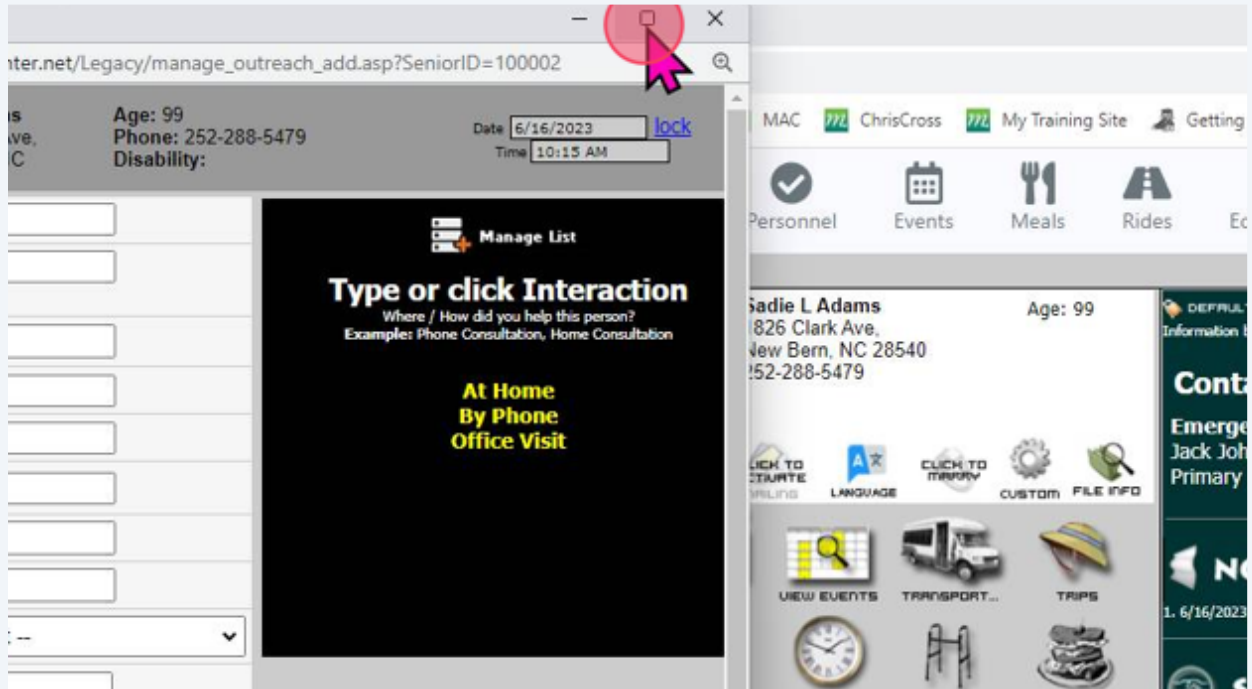
Click "Add Service"



64

Here we're creating a record of a one-on-one interaction that we had with this person on a specific date and time. The date and time will default to the current date and time but you can change those. You can put in past dates, future dates, and anytime that you want. Mostly what you'll be doing is choosing from lists. Just like with our note categories, all of these lists can be edited. There's always a link at the top to manage the list just like with our note categories.

Expand the Window



65 First we're going to choose an interaction type.

Header: Sadie Adams, 1826 Clark Ave., New Bern, NC; Age: 99; Phone: 252-288-5479; Disability: ; Date: 6/16/2023; Time: 10:15 AM; lock

Interaction	<input type="text"/>
Category	<input type="text"/>
Assistance	<input type="text"/>
Refer From	<input type="text"/>
Refer To	<input type="text"/>
Service Units	<input type="text" value="0"/>
Hours	<input type="text" value="1"/>
Rate	<input type="text" value="0"/>
Account	-- Select Account --
Notes	<input type="text"/>

Buttons: ADD, ADD and Open Custom Fields

Manage List

Type or click Interaction

Where / How did you help this person?
Example: Phone Consultation, Home Consultation

At Home
By Phone
Office Visit

66 Next you'll categorize the interaction.

Header: Sadie Adams, 1826 Clark Ave., New Bern, NC; Age: 99; Phone: 252-288-5479; Disability: ; Date: 6/16/2023; Time: 10:15 AM; lock

Interaction	By Phone
Category	<input type="text"/>
Assistance	<input type="text"/>
Refer From	<input type="text"/>
Refer To	<input type="text"/>
Service Units	<input type="text" value="0"/>
Hours	<input type="text" value="1"/>
Rate	<input type="text" value="0"/>
Account	-- Select Account --
Notes	<input type="text"/>

Buttons: ADD, ADD and Open Custom Fields

Multi Add - Single Add

Manage List

Type or click Category

What category would this Outreach action fall under?
Example: Are You OK, Advocacy, Hearing Aid

Are You Ok
Family Support
Hearing Aid
Insurance
Medical

67 Next you can indicate a specific service

Header: Sadie Adams, 1826 Clark Ave., New Bern, NC; Age: 99; Phone: 252-288-5479; Disability: [blank]; Date: 6/16/2023; Time: 10:15 AM; lock

Interaction	By Phone
Category	Family Support
Assistance	[blank]
Refer From	[blank]
Refer To	[blank]
Service Units	0
Hours	1
Rate	0
Account	-- Select Account --
Notes	[blank]

Buttons: ADD, ADD and Open Custom Fields

Multi Add - Single Add

Manage List

Type or click Assistance

What type of assistance was given to the person?
Example: hearing aid check, mail information, ...

- Cable Discount
- Electric Discount
- Find A Referral
- Food Stamp Applications
- Fuel Assistance
- Housing
- OT/CA
- Phone Discount

68 Next you can indicate if they were referred to you

Header: Sadie Adams, 1826 Clark Ave., New Bern, NC; Age: 99; Phone: 252-288-5479; Disability: [blank]; Date: 6/16/2023; Time: 10:15 AM; lock

Interaction	By Phone
Category	Family Support
Assistance	Fuel Assistance
Refer From	[blank]
Refer To	[blank]
Service Units	0
Hours	1
Rate	0
Account	-- Select Account --
Notes	[blank]

Buttons: ADD, ADD and Open Custom Fields

Manage List

Type or click Referral From

Who has referred this person to you?
Example: West Town Senior Center, Elderly Service Agency, Fred

- Doctor
- Family
- Social Services

69

You can also indicate if you are referring them to someone else

for.net/legacy/manage_outreach_add.asp?SeniorID=100002

Sadie Adams
1826 Clark Ave,
New Bern, NC

Age: 99
Phone: 252-288-5479
Disability:

Date: 6/16/2023 [lock](#)
Time: 10:15 AM

Interaction	By Phone
Category	Family Support
Assistance Unit	Fuel Assistance
Refer From	Family
Refer To	
Service Units	0
Hours	1
Rate	0
Account	-- Select Account --
Notes	

Manage List

Type or click Referral To

Who did you refer this person to?
Example: West Town Senior Center, Elderly Service Agency, Fred

MOW
Senior Center
VNA

ADD ADD and Open Custom Fields

70

UNITS:

Some centers have a grading system in which they have to assign a certain amount of unit to an interaction based on a number of factors. Although this is one interaction, you can enter as many units as you want. Then, in statistics, you can not only see how many interactions for a date range but you can also get a total number of units.

HOURS:

Here you can also track how much time you have spent with a person and pull totals within statistics. Hours are entered as decimals. For example, fifteen minutes would be enter as .25.

RATE (Optional Field that is turned on under preferences):

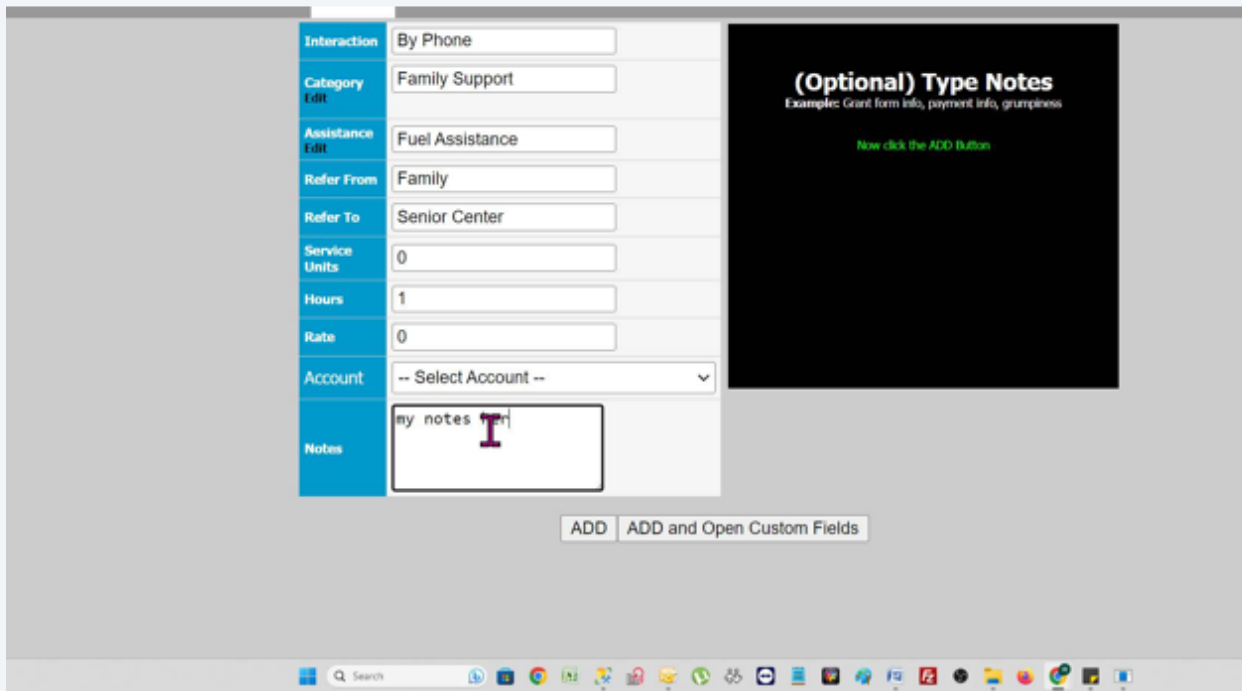
Some centers do have an hourly rate they need to apply and from that they can generate invoices.

ACCOUNT (Optional Field that is turned on under preferences):

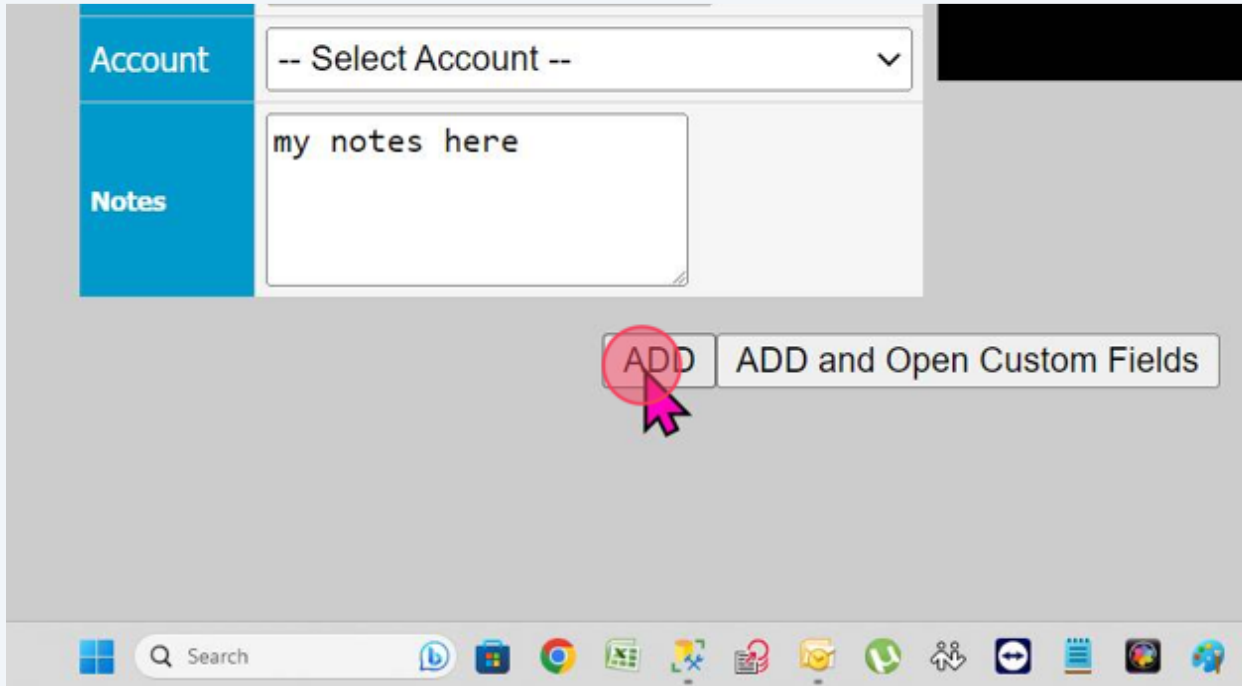
You can choose which payments received account the rate is be allocated to.

NOTES:

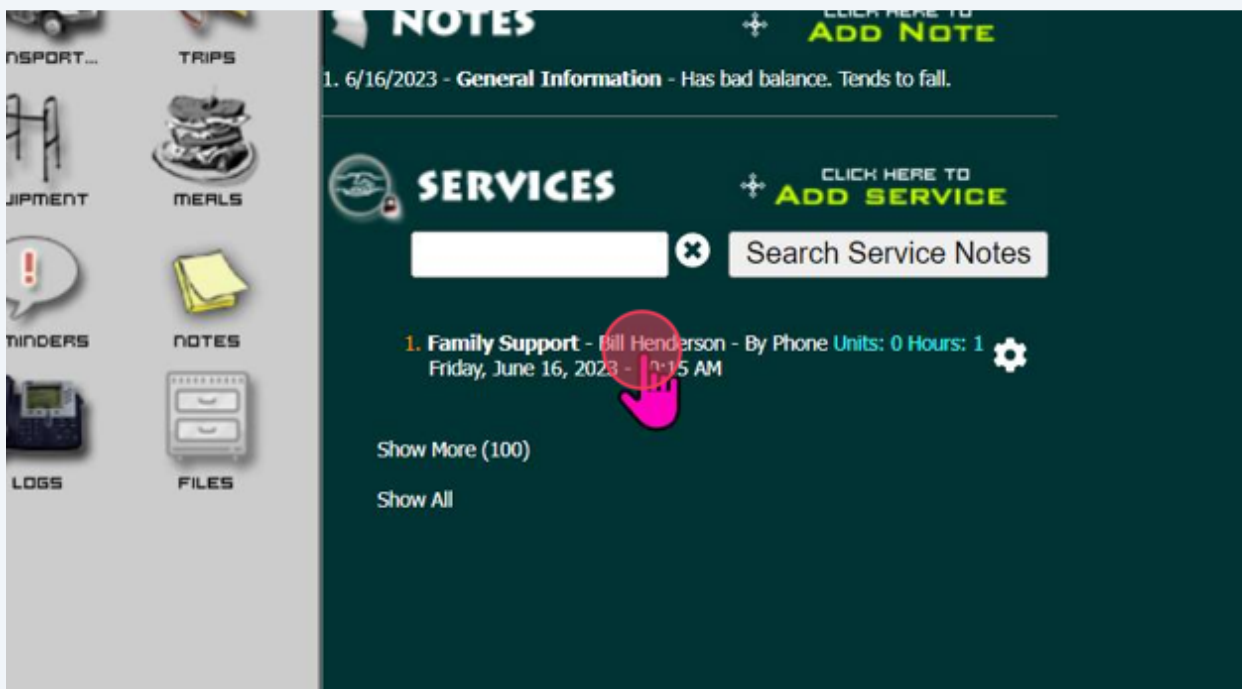
You can enter any notes you like.



71 Click "Add" to save the record.

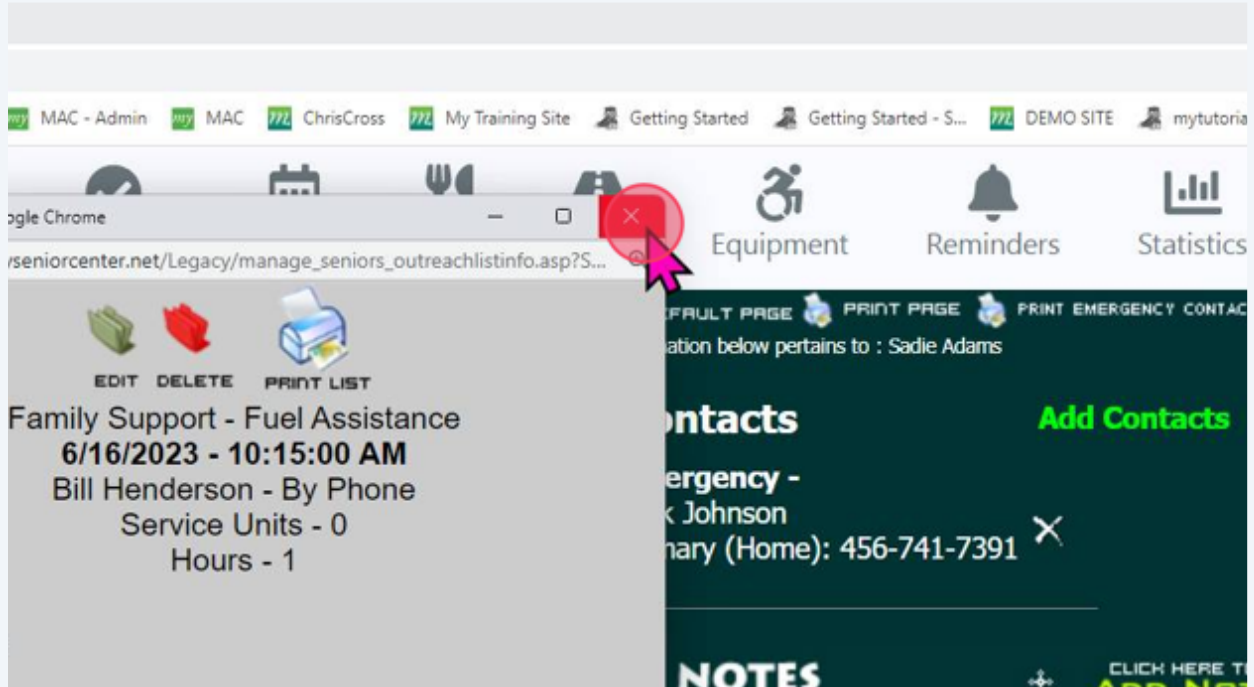


72 Now we can see that record listed there along with your name (the creator) and the date and time. Service records are sorted by date. The recent record is listed at the top. The search box shows up once you create the first record so once you have a long history of records you can easily search for specific records. Click directly on the record.



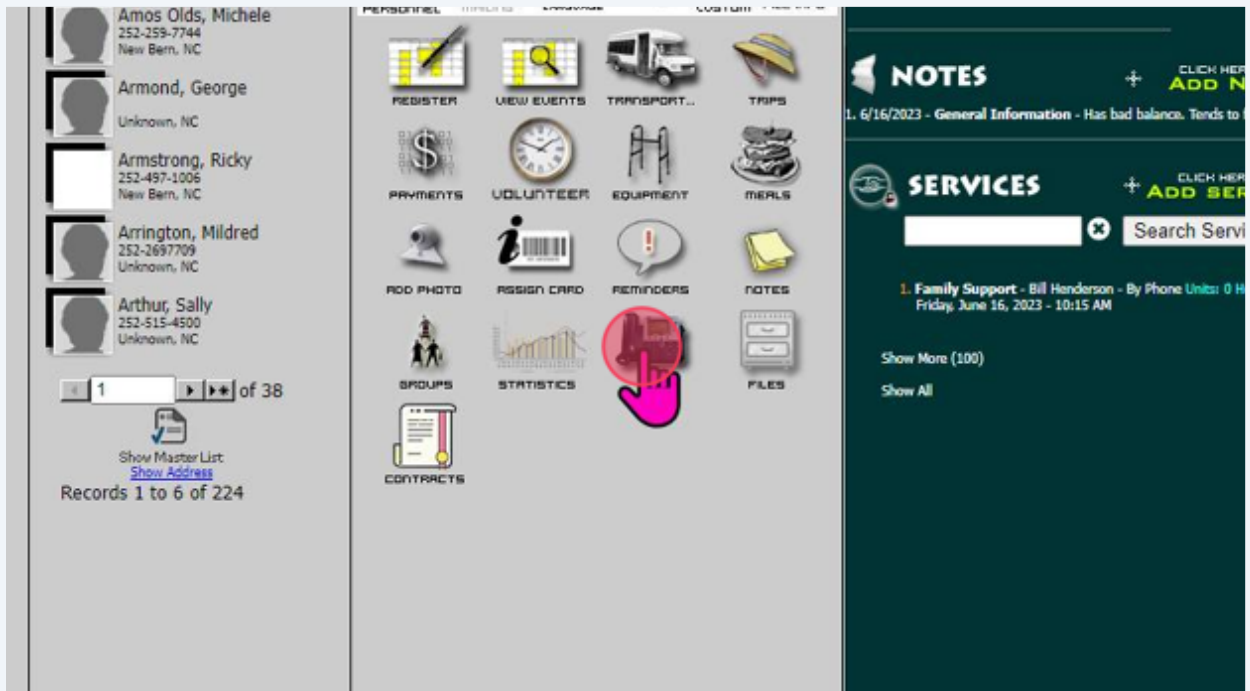
73

Here you can see all the details for the record. You can also see the edit, delete and print buttons. Close the window.



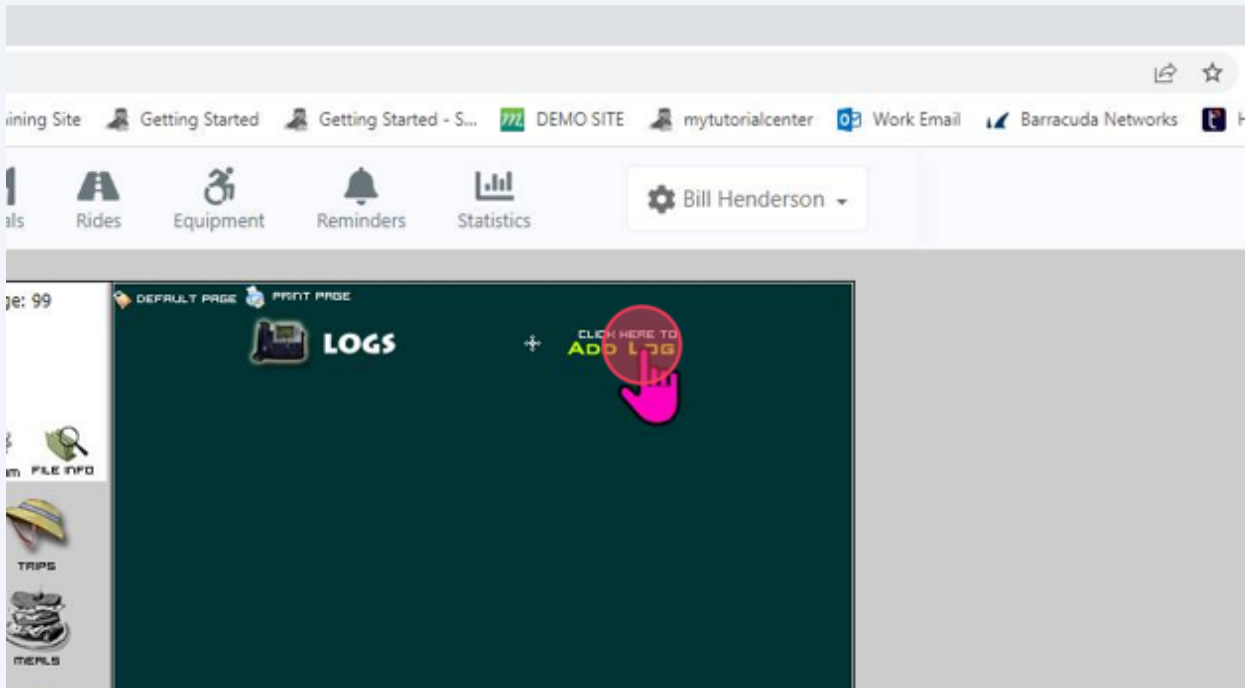
The Logs Icons

74 Click the "Logs" Icon



75

Logs is designed to keep track of non confidential interactions with people. Many centers rely on statistics about phone calls for grant reporting. Logs allows you to keep track of all of the other types of interactions that are non service related. No center is putting in a log for every call. If someone calls to ask what time you're open for example, you're not going to log that call. Logs is intended for things that you're spending a little bit more time with or maybe you're going to want to reference back to some notes because this person tends to call about this a lot. That's what logs is for. Click "Add Log".



76

Here we can see the person's name and phone as well as date and time. Phone, Date and time can all be changed. You will be choosing from lists again. Just like with services. These lists can all be customized just like the other lists we've seen so far.

Add Phone Log - Google Chrome
trainingcenter.myseniorcenter.net/Legacy/manage_seniors_logs.../addlogsadd.asp?SeniorID=100002

Name	Sadie Adams
Phone Log To/From	<input type="radio"/> To <input checked="" type="radio"/> From
Phone Number	252-288-5479
Date	6/16/2023
Time	03:08 PM
Main Category	
Sub Category	
Type	
Phone Log Notes	

Log To or Log From
Select Whether or Not the Log is for in incoming or outgoing action.

Next →

77

To make a choice simply click on the choices in the lists.

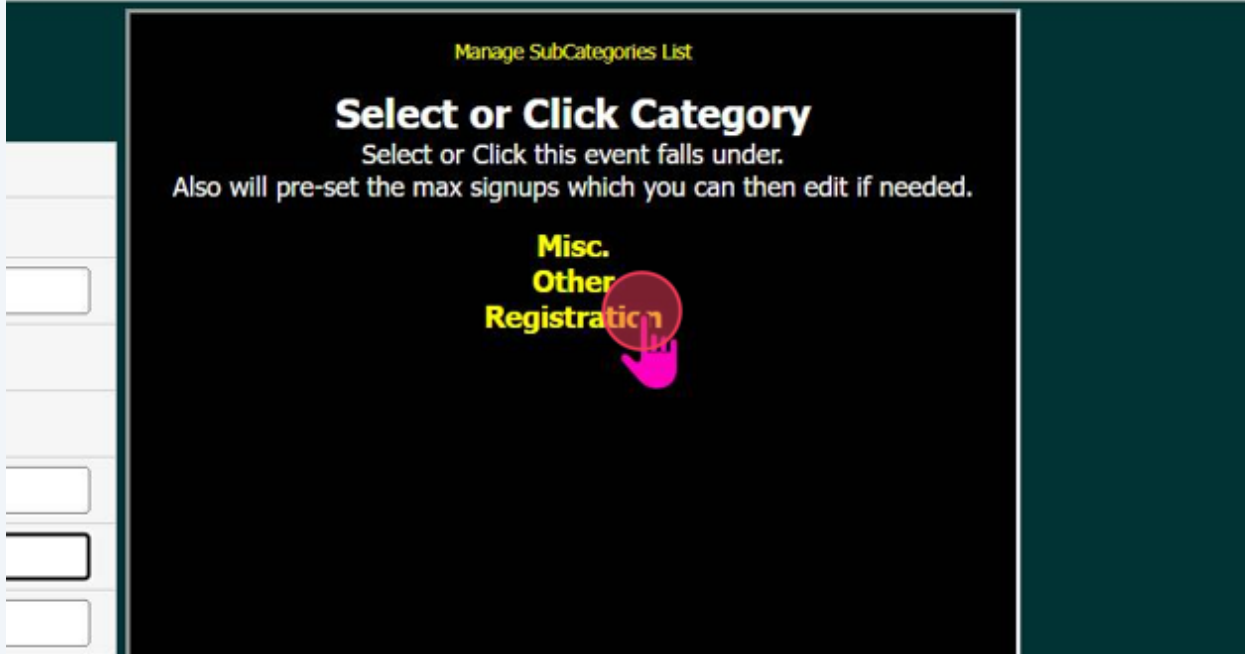
Choose a category

Manage Categories List

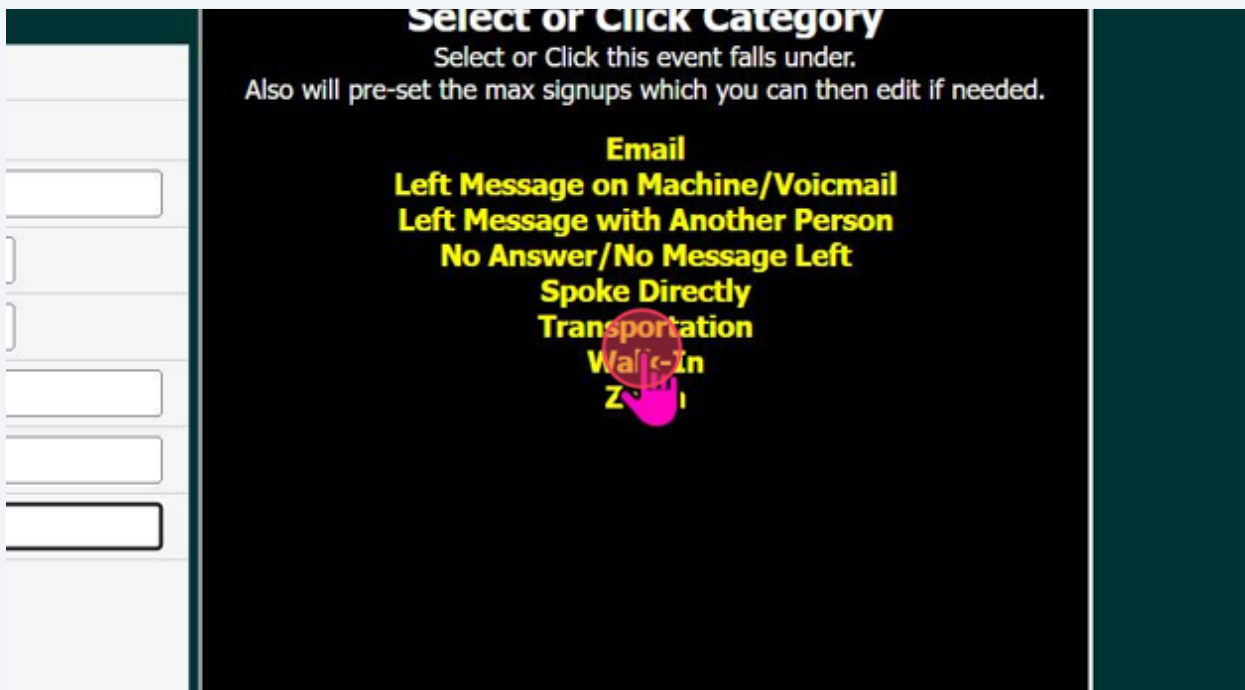
Select or Click Category
Select or Click this event falls under.
Also will pre-set the max signups which you can then edit if needed.

- Checkin
- Events
- Inquiry**
- Misc
- Transportation
- Trips


78 Choose a sub-category



79 Choose a type



80 Enter your notes

Time	<input type="text" value="03:08 PM"/>
Main Category	<input type="text" value="Events"/>
Sub Category	<input type="text" value="Registration"/>
Type	<input type="text" value="Walk-In"/>
Phone Log Notes	<div style="border: 1px solid gray; height: 40px; display: flex; align-items: center; justify-content: center;"></div>

SP
Tr

81 Click "Add Log"

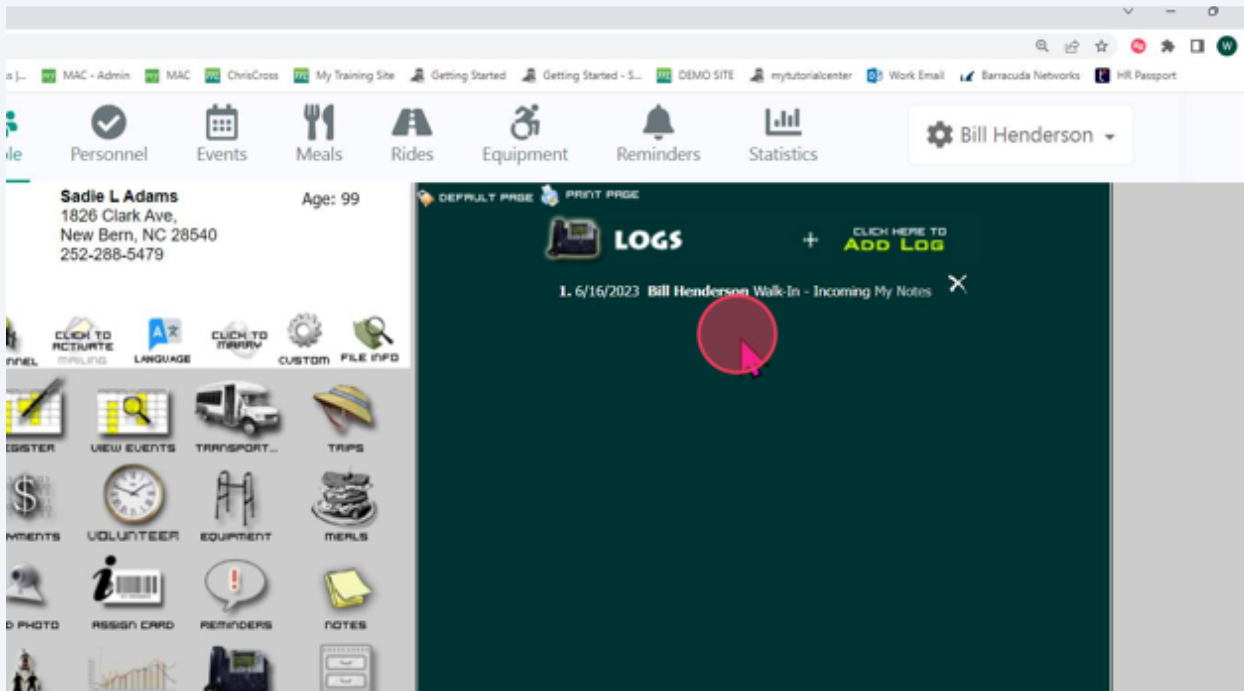
My Notes

SP
Tr

SP
Tr

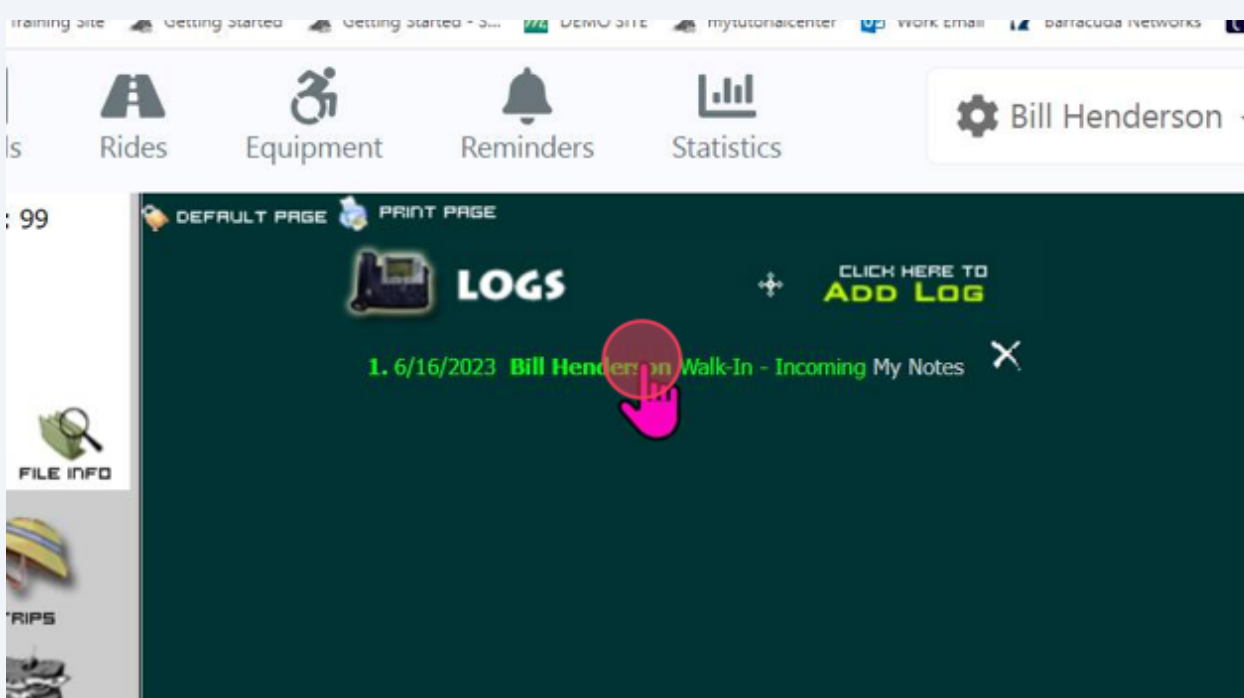
82

Now we can see that log listed there along with your name and the date. Logs are sorted by date and the most recent log is listed at the top. All staff have access to logs and can see all logs as well as the name of the person that entered the log. Logs provide full statistics.



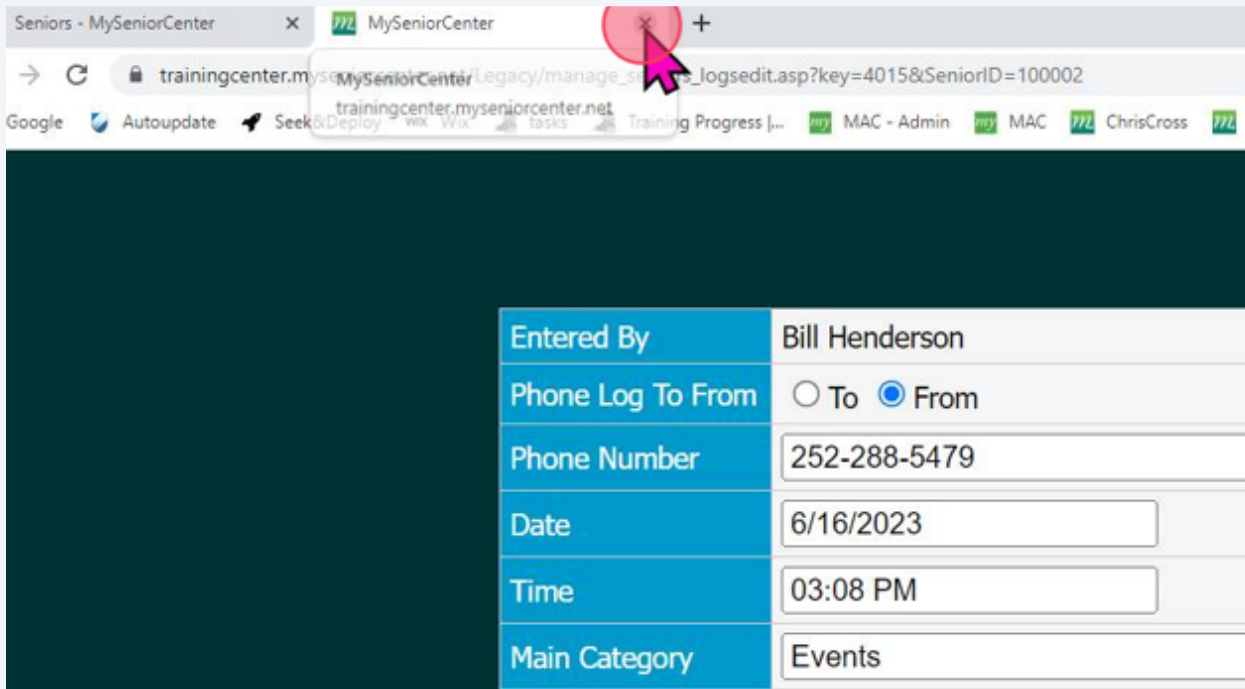
83

Click directly on the log.



84

Here you can see all the details for the log and make edits.
Close the window.



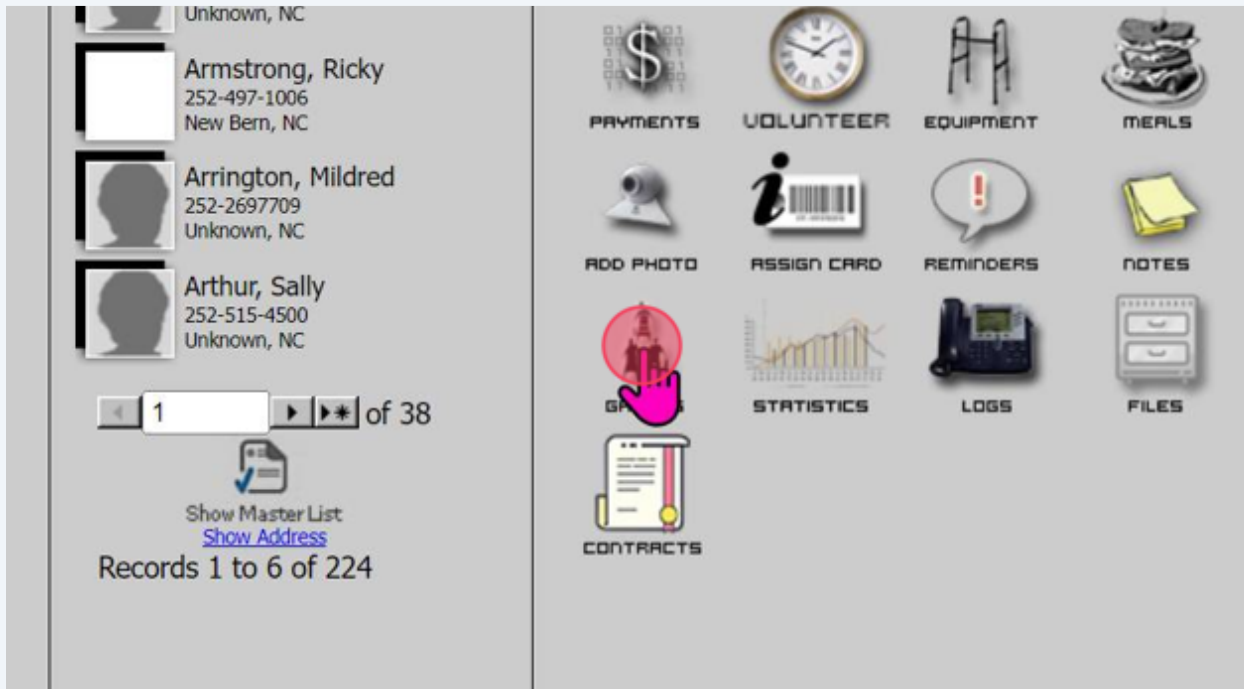
The screenshot shows a web browser window with the address bar containing the URL: `trainingcenter.myseniorcenter.net/Legacy/manage_seniors_logsedit.asp?key=4015&SeniorID=100002`. A mouse cursor is pointing at the close button (X) in the browser's tab bar. The main content area displays a form with the following fields:

Entered By	Bill Henderson
Phone Log To From	<input type="radio"/> To <input checked="" type="radio"/> From
Phone Number	252-288-5479
Date	6/16/2023
Time	03:08 PM
Main Category	Events

The Groups Icon

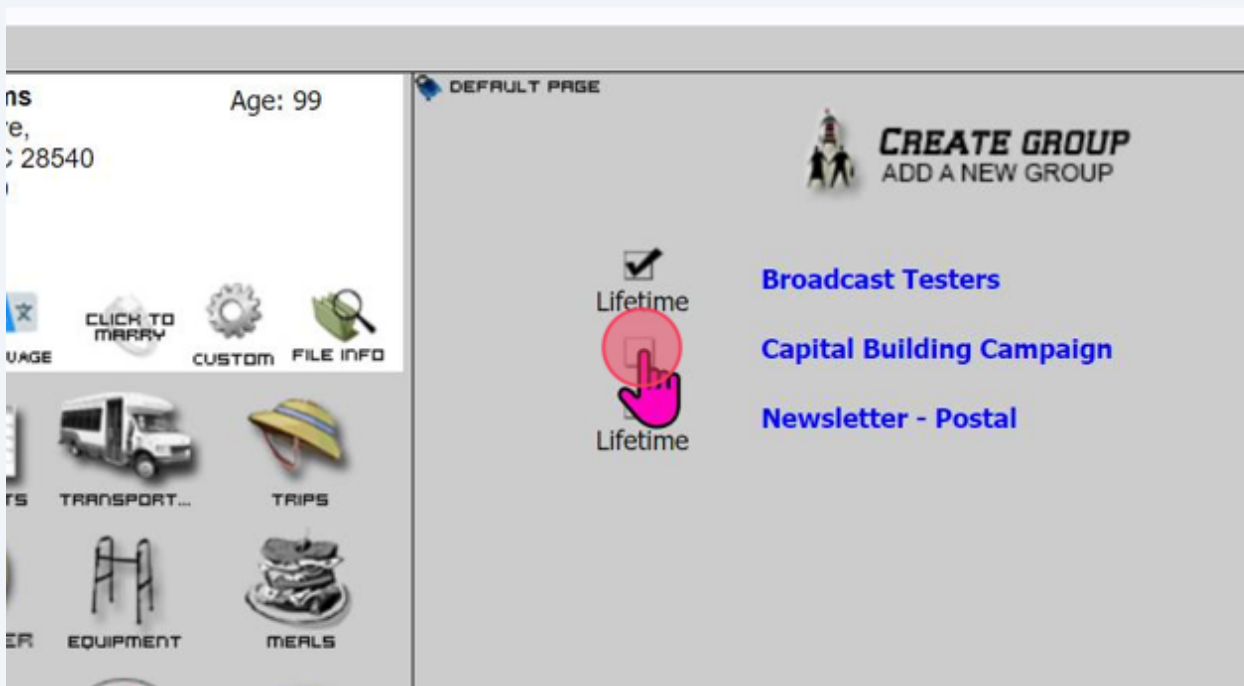
85

The most basic definition of groups is that groups allows you to group people together so that you can perform actions on them as a group rather than as individuals. Actions like sending out a broadcast call to everyone in the group or sending an email or a text or creating mailing labels for everyone in a group or using that group as a filter when you're running statistics. You can even leaving a message at the touch screen for everyone in that group. There's many reasons for creating a group.



86

To take someone out of a group simply uncheck the box



87 To add someone to a group check the box

Age: 99
e,
> 28540

CREATE GROUP
ADD A NEW GROUP

Lifetime **Broadcast Testers**

Lifetime **Capital Building Campaign**

Lifetime **Newsletter - Postal**

UAGE CLICK TO MARRY CUSTOM FILE INFO

TS TRANSPORT... TRIPS

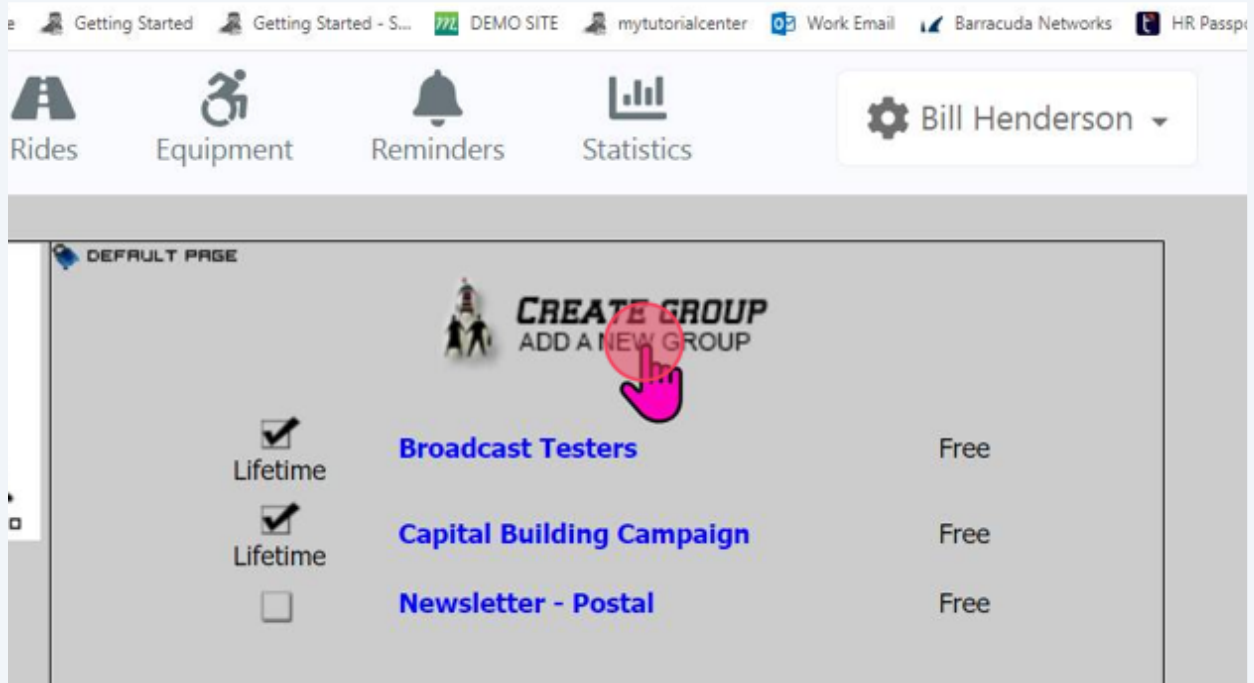
ER EQUIPMENT MEALS

ND REMINDERS NOTES

88

On the person level that's about all you're doing. You may be coming in to add someone to a group, take them out of a group, or maybe you're just coming in to see what groups they belong to. There is no limit to how many people can added to a group and there is no limit to how many groups a person may be in.

Click create group.



89

There are two types of groups. There's a simple group and there's a membership group. We're going to talk about simple groups first. With a simple group. All you have to do is give it a name and enter some notes. It's highly recommended that you do enter notes. These notes are really not for yourself but more for others and people in the future. This will cause less confusion down the road. Optionally you can choose from a list of sponsors. If you've created one. You can choose a payments received account to allocate any payments you're taking in from this group. The Membership Group setting is a simple yes or no. If you change it to yes there will be a badge next to the person's name in their profile under the people tab if they are in this group. With block swipe changed to yes, this means that when someone's membership has expired the touch screen will no longer allow them to check in. Changing required group to yes means anyone checking in at the touchscreen is required to be in this group to be able to check in at all. Changing display in my active center to yes will display this group in MyActiveCenter and allow people to add and remove themselves from the group. We'll talk about the other settings in a moment.

trainingcenter.myactivecenter.net/Groups/Modify/Type=0&accountId=2&siteid=1

Create a Group

Group Name:

Notes:

Sponsor:

Account:

Membership Group: NO

Block Swipe: NO Group member can swipe, even if expired.

Required Group: NO Prevents any non-members from Swipe or Event Signup.

Display in MyActiveCenter: NO This group will be NOT be displayed in the Portal

Group is Free: YES

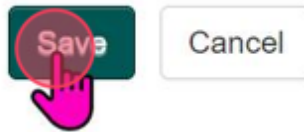
Lifetime: YES No expiration date.

90 Click "Save"

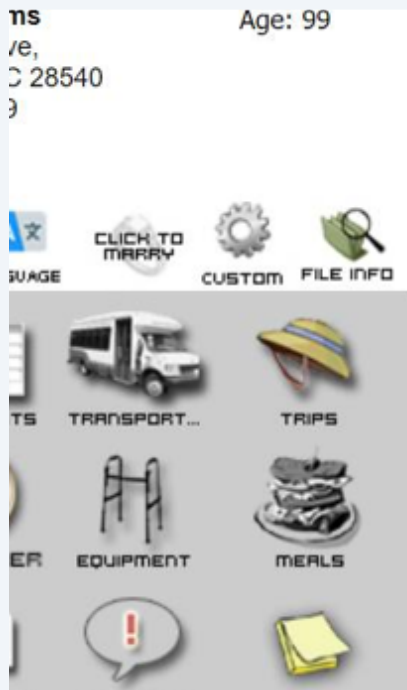
vents any non-members from Swipe or Event Signup.

s group will be NOT be displayed in the Portal

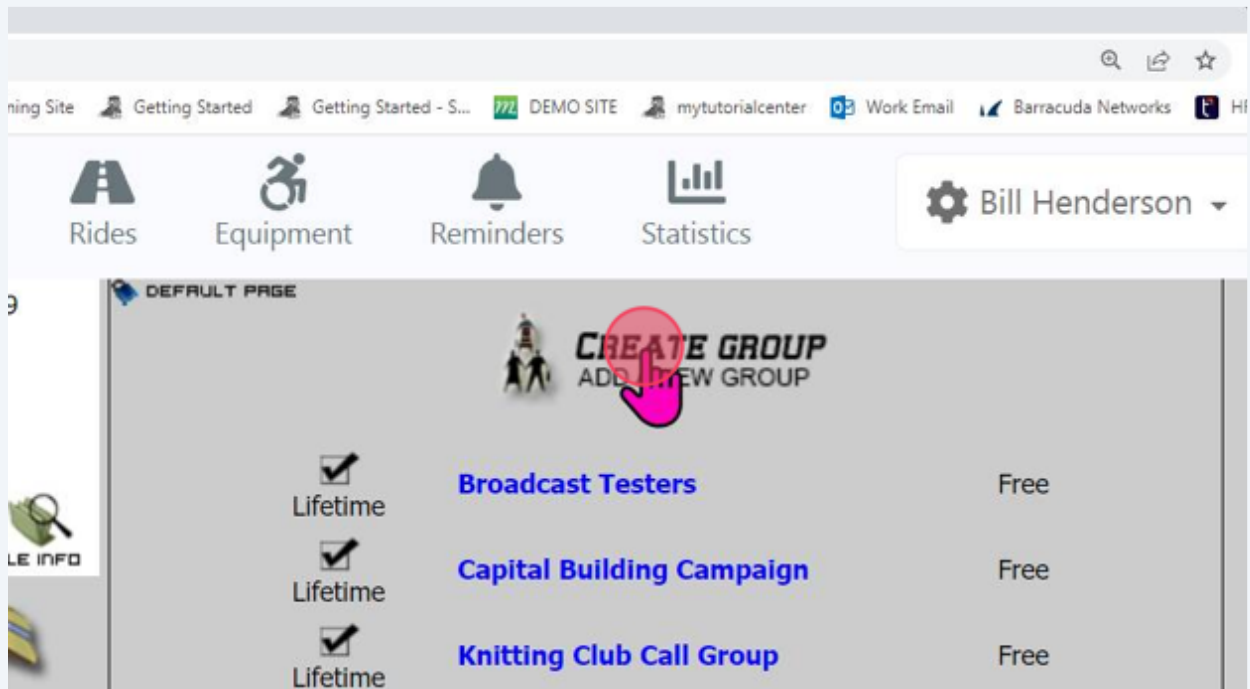
expiration date.



91 Now we can start adding people to that group



92 Click create group again



93 Let's name this group center membership and we'll put in some notes that tell people this is to keep track of people's memberships

The screenshot shows the 'Create a Group' form in a web application. The form includes the following fields and options:

- Group Name: Center Memberships
- Notes: keeps track of when people paid and when they are due to pay again
- Sponsor: [Dropdown menu]
- Account: [Dropdown menu]
- Membership Group: NO
- Block Swipe: NO (Group member can swipe, even if expired.)
- Required Group: NO (Prevents any non-members from Swipe or Event Signup.)
- Display in MyActiveCenter: NO (This group will be NOT be displayed in the Portal)
- Group is Free: YES
- Lifetime: YES (No expiration date.)


At the bottom of the form, there are 'Save' and 'Cancel' buttons.

94 Let's change group is free to no


Block Swipe:	<input type="checkbox"/> NO	Group member can swipe, even if ex
Required Group:	<input type="checkbox"/> NO	Prevents any non-members from Sw
Display in MyActiveCenter:	<input type="checkbox"/> NO	This group will be NOT be displayed
Group is Free:	<input checked="" type="checkbox"/> YES	
Lifetime:	<input checked="" type="checkbox"/> YES	No expiration date.

95 With lifetime at yes once a member joins and pays their fee they will be a member for life. Let's change that to no.

Required Group:	<input type="checkbox"/> NO	Prevents any non-members from Sw
Display in MyActiveCenter:	<input type="checkbox"/> NO	This group will be NOT be displayed
Group is Free:	<input type="checkbox"/> NO	
Lifetime:	<input checked="" type="checkbox"/> YES	Group member pays once, no expira
Amount:	\$ <input type="text" value="0"/>	




96 Let's change expires on a cycle to no.

Display in MyActiveCenter:	<input type="checkbox"/> NO	This group will be NOT be displayed
Group is Free:	<input type="checkbox"/> NO	
Lifetime:	<input type="checkbox"/> NO	Group member belongs to the group
Expires on a cycle:	<input checked="" type="checkbox"/> YES 	Group members have their own expiration date which will be determined when they join the group
Payment Plan:	<input type="button" value="Add New"/>	

97 With expires on a cycle set to no you will enter in one cost and one expiration date that will apply to everyone in the group regardless of when they are added to the group. Let's change expires on a cycle to yes.

Group is Free:	<input type="checkbox"/> NO	
Lifetime:	<input type="checkbox"/> NO	Group member belongs to the group
Expires on a cycle:	<input type="checkbox"/> NO	Group members all have the same expiration date
Amount:	\$ <input type="text" value="0"/>	
Expiration Date:	<input type="text"/>	



98 Click "Add New" To add a new payment plan.

Group is Free: NO

Lifetime: NO Group member belongs to the group

Expires on a cycle: YES Group members have their own expiration date to be determined when they join the group

Payment Plan:

99 Let's give our plan a name and cost and choose a renewal period. You can choose absolutely any renewal period that you want.

Expires on a cycle: YES Group members have their own expiration date. To be determined when they join the group.

Payment Plan:

Name:

Cost: \$

Renew every: Years: Months: Days:

100 Click "Save Payment Plan"

Group members have their own expiration date. The date will be determined when they join the group.

Annual Plan

10

Years: Months: Days:

Save Payment Plan

Cancel



101 Click "Add New" To add another plan.

Group is Free:

NO

Lifetime:

NO

Group member belongs to the group

Expires on a cycle:

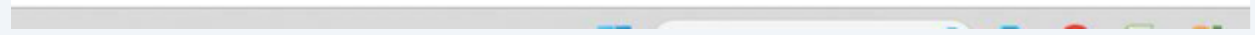
YES

Group members have their own expiration date. The date will be determined when they join the group.

Payment Plan:

Add New

\$25.00 - Annual Plan (1 year)



102 Again give your plan a name, cost and a renewal period.

NO Group member belongs to the group until an expiration date.

YES Group members have their own expiration date. The date will be determined when they join the group.

Payment Plan:

Name:

Cost: \$

Renew every: **Years:** **Months:** **Days:**

103 Click "Save Payment Plan"

Group member belongs to the group until an expiration date.

Group members have their own expiration date. The date will be determined when they join the group.

Years: **Months:** **Days:**

104 Click "Add New" To enter one last payment plan.

The screenshot shows a web form with three main sections: 'Lifetime:', 'Expires on a cycle:', and 'Payment Plan:'.
- 'Lifetime:' has a toggle set to 'NO'. A yellow tooltip to the right says 'Group member belongs to the group'.
- 'Expires on a cycle:' has a toggle set to 'YES'. A yellow tooltip to the right says 'Group members have their own expiration date be determined when they join the group'.
- 'Payment Plan:' has an 'Add New' button highlighted with a red circle and a hand cursor. Below it are two existing plans:
 - '\$25.00 - Annual Plan (1 year)' with edit and delete icons.
 - '\$50.00 - Two Year Plan (2 years)' with edit and delete icons.
The Windows taskbar is visible at the bottom with a search bar and several application icons.

105 And once more give your plan a name, cost and a renewal period.

The screenshot shows the same web form, but now the 'Add New' button is highlighted with a red circle and a hand cursor. The form fields are filled out as follows:
- 'Lifetime:' toggle is 'NO'.
- 'Expires on a cycle:' toggle is 'YES'.
- 'Payment Plan:' section:
 - 'Name:' text box contains 'Super VIP Plan'.
 - 'Cost:' text box contains '\$ 300.00'.
 - 'Renew every:' section has three input boxes for 'Years:', 'Months:', and 'Days:'. The 'Years:' box is highlighted with a red circle and a hand cursor.
 - A 'Save Payment' button is visible on the right side of the form.
The Windows taskbar is visible at the bottom.

106 Click Save payment plan.

Group member belongs to the group until an expiration date.

Group members have their own expiration date. The date will be determined when they join the group.

Super VIP Plan

300.00

Years: Months: Days:

100

Save Payment Plan Cancel

107 Click Save to save the group

terminated when they join the group.

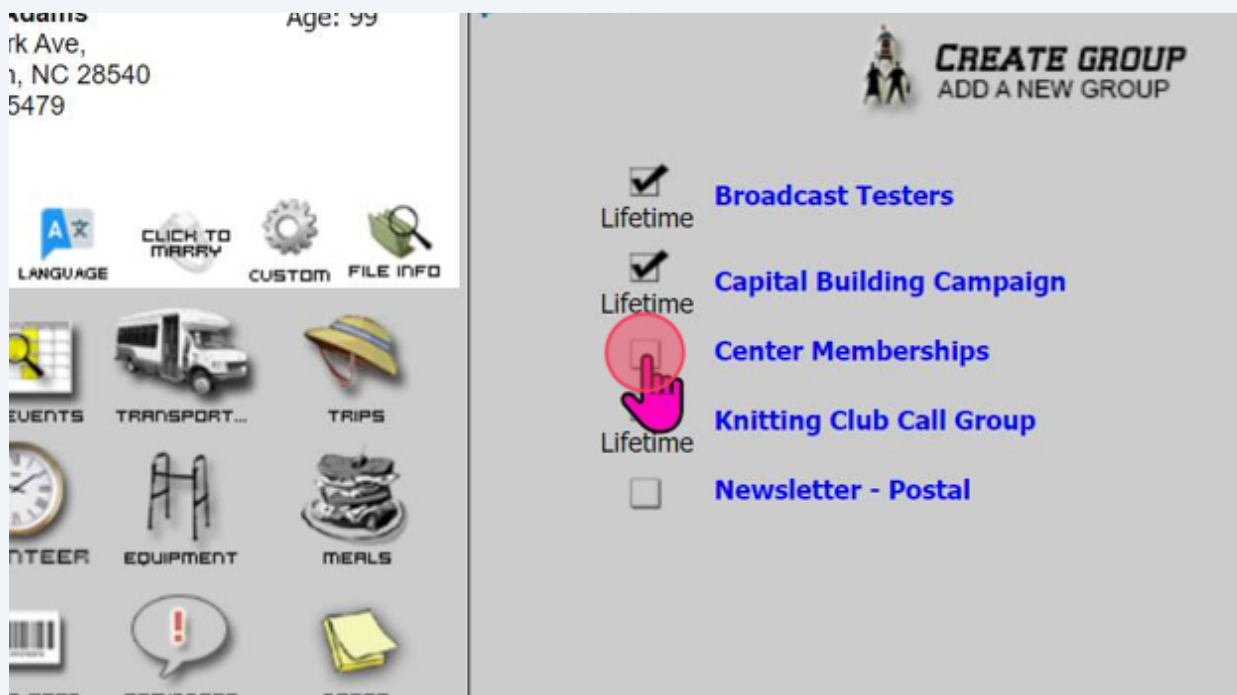
ear) [edit] [x]

: years) [edit] [x]

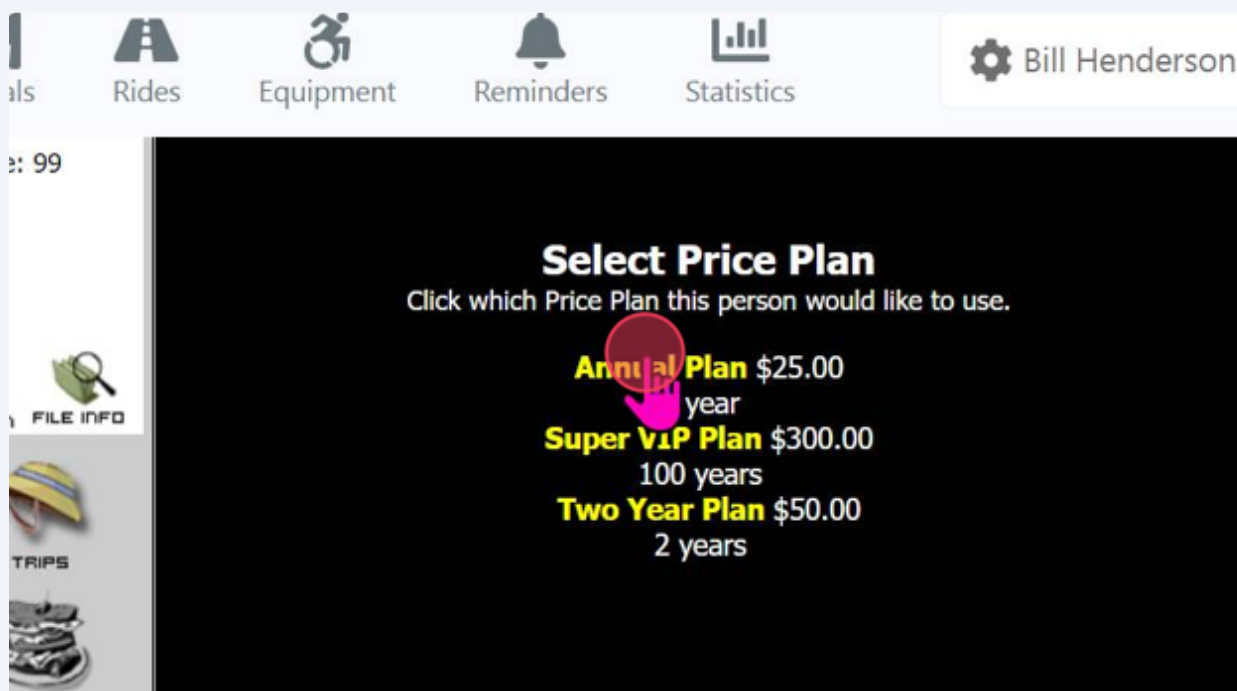
(100 years) [edit] [x]

Save Cancel

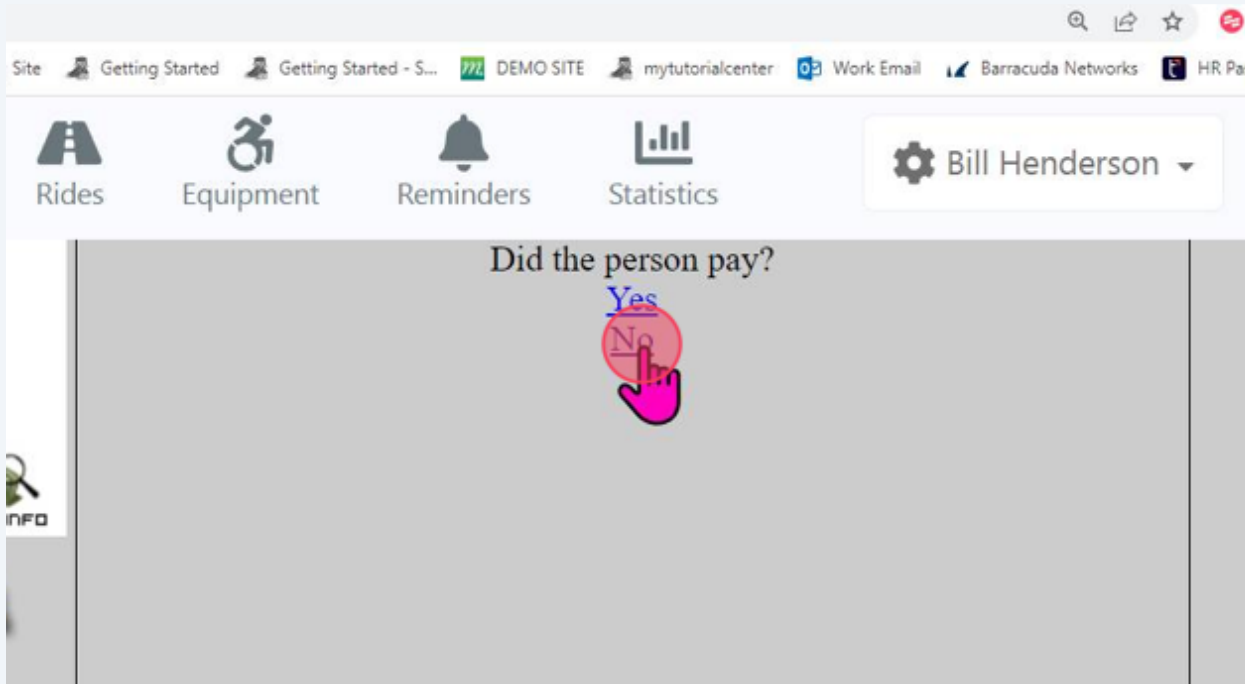
108 Add a person to the group by checking the Box for that group.



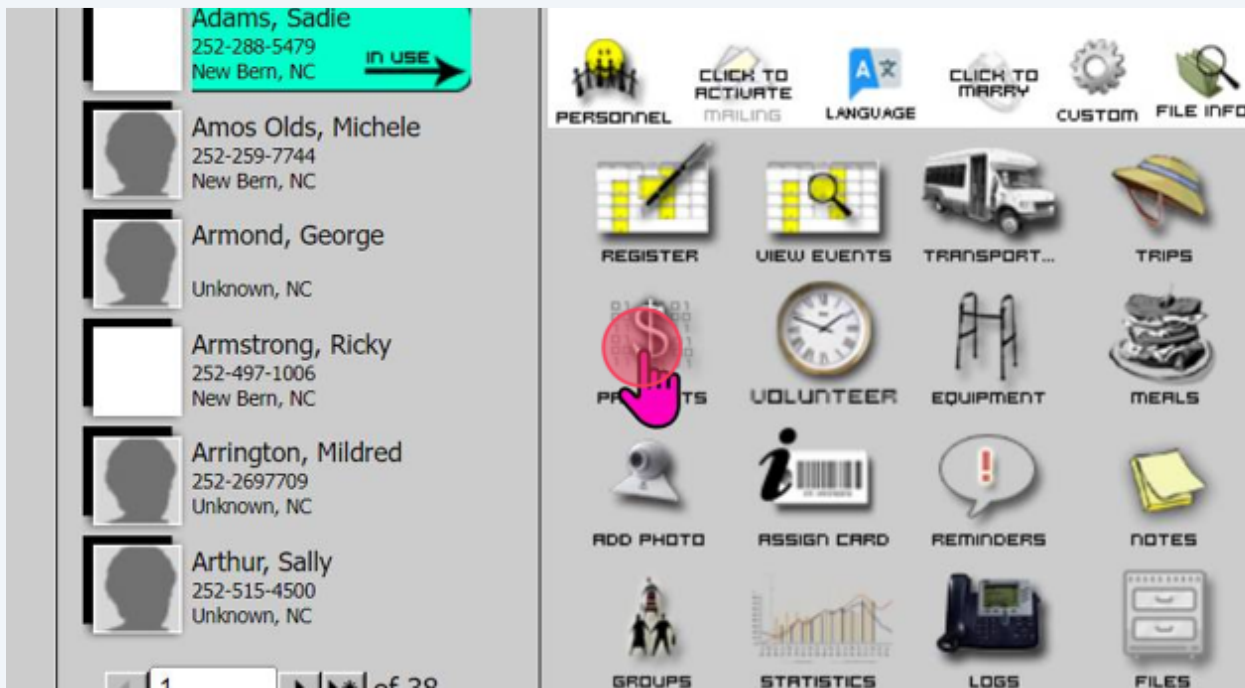
109 Select a payment plan.



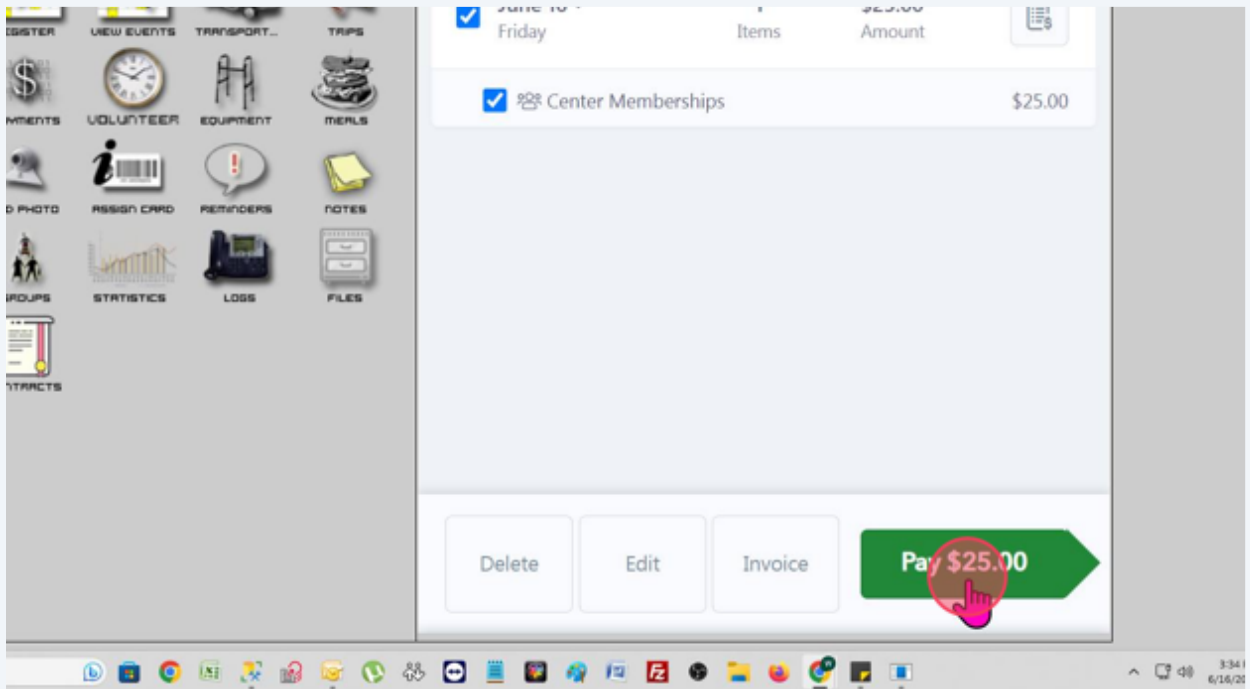
110 Here you will be asked if the Person paid but you may not be ready to settle that payment if you're signing them up for other things as well. Click "No" here.



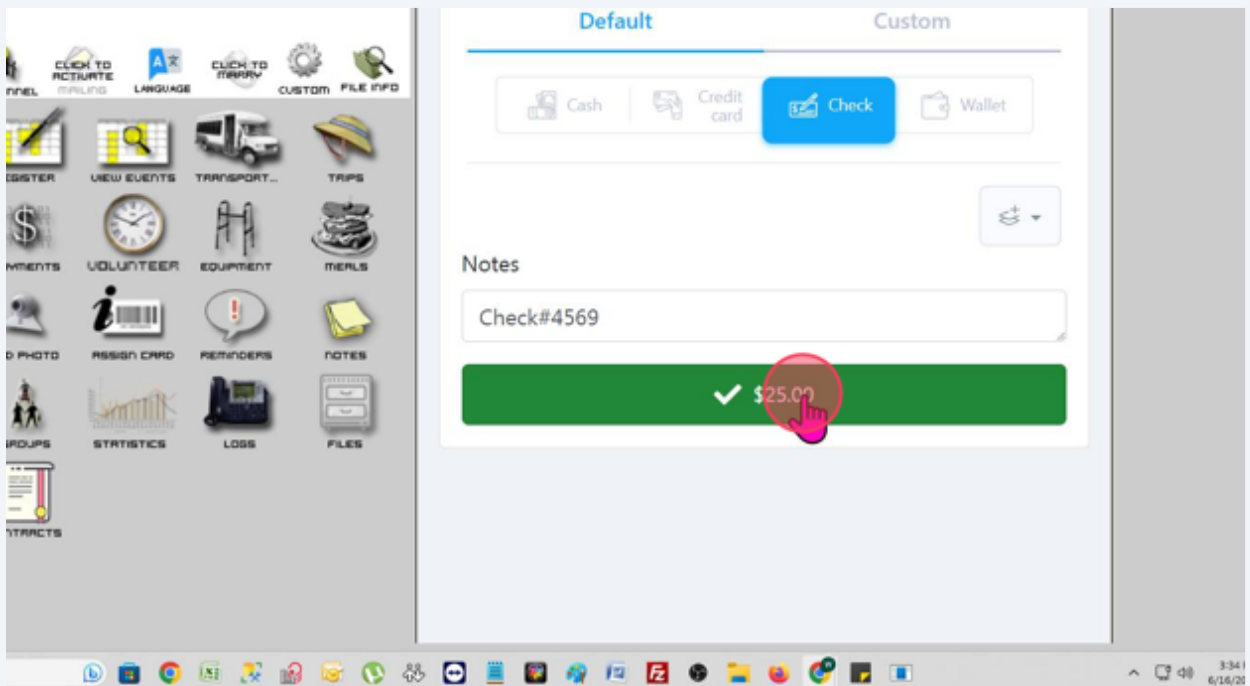
111 Once you are ready to settle the payment you can click on their payment icon.



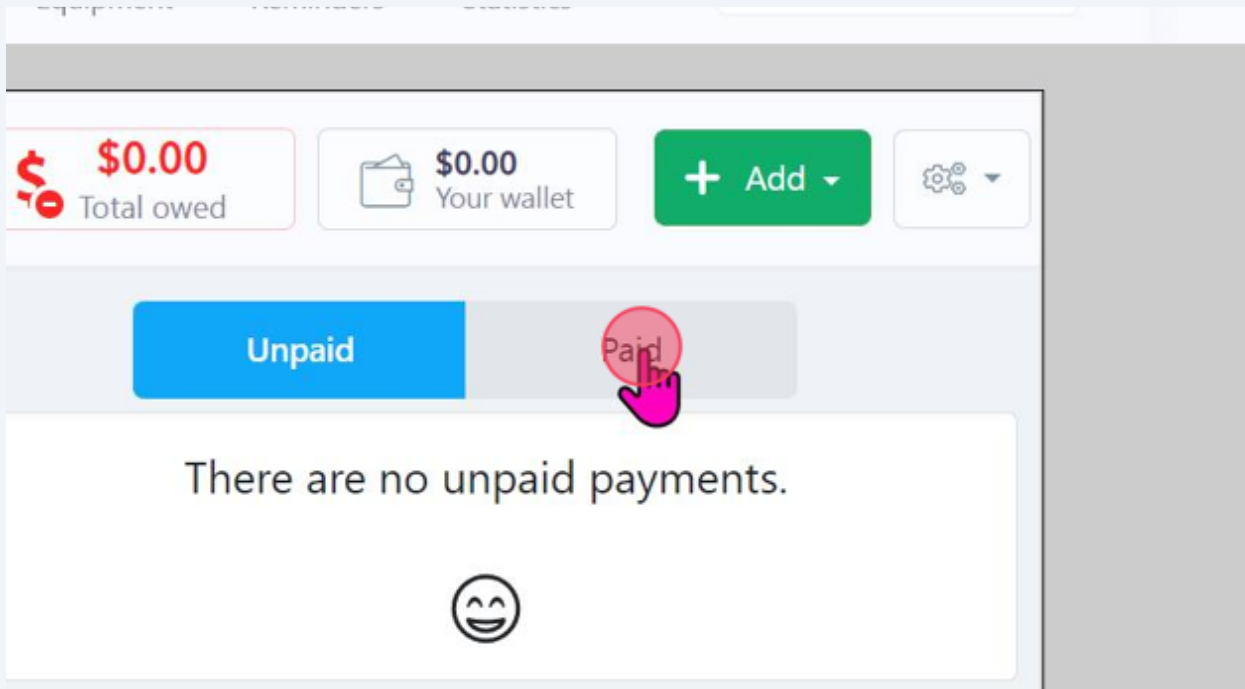
112 Here you will see their unpaid charge and can click pay at the bottom



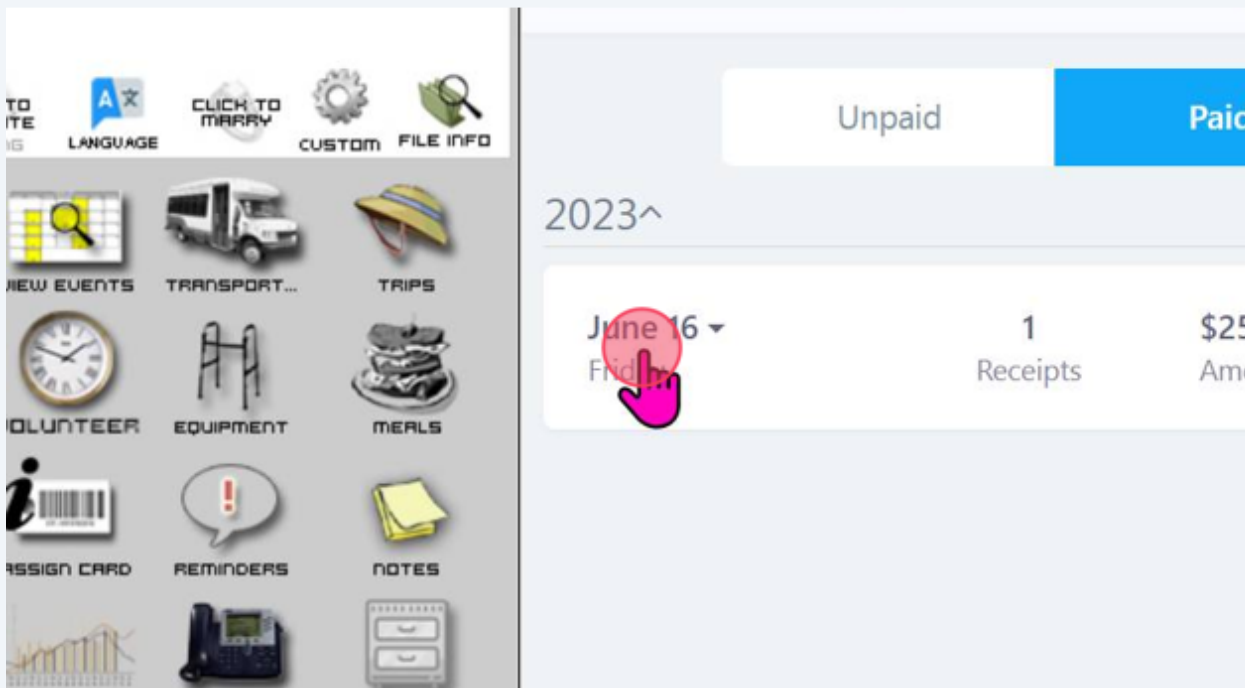
113 Now you'll choose a payment plan and enter any note you may need to. For example, check numbers can be typed in the notes field. Now click the big green button at the bottom



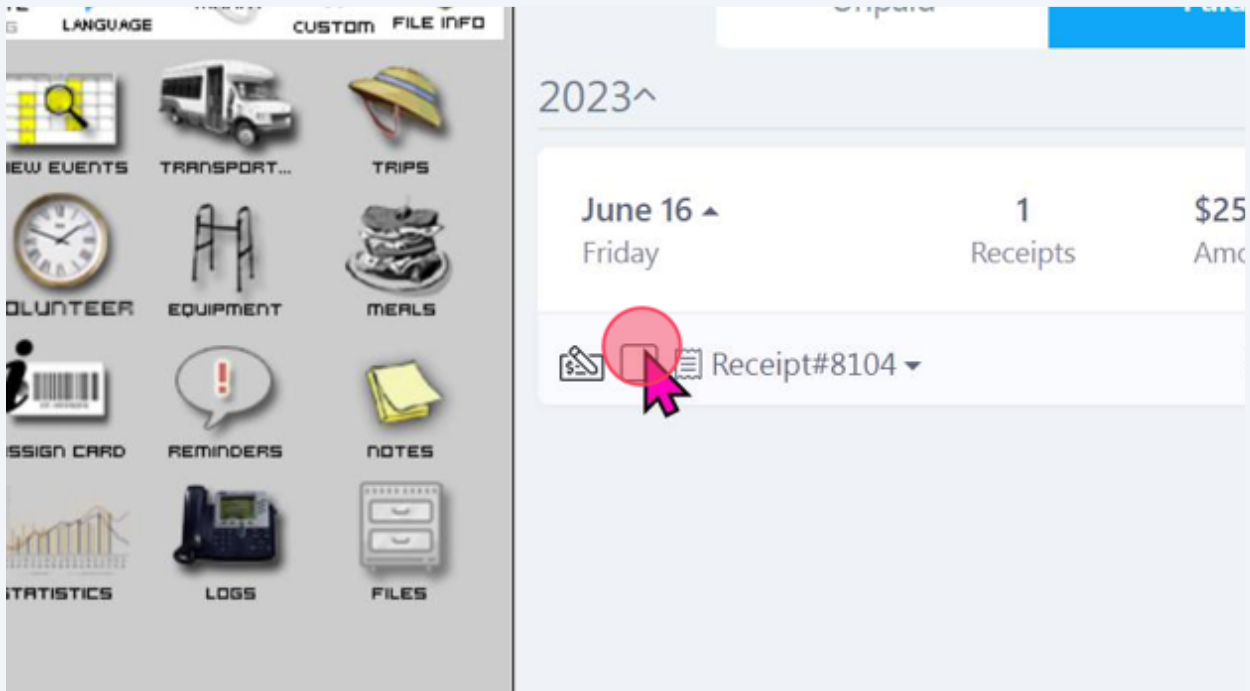
114 To print a receipt click the Paid tab.



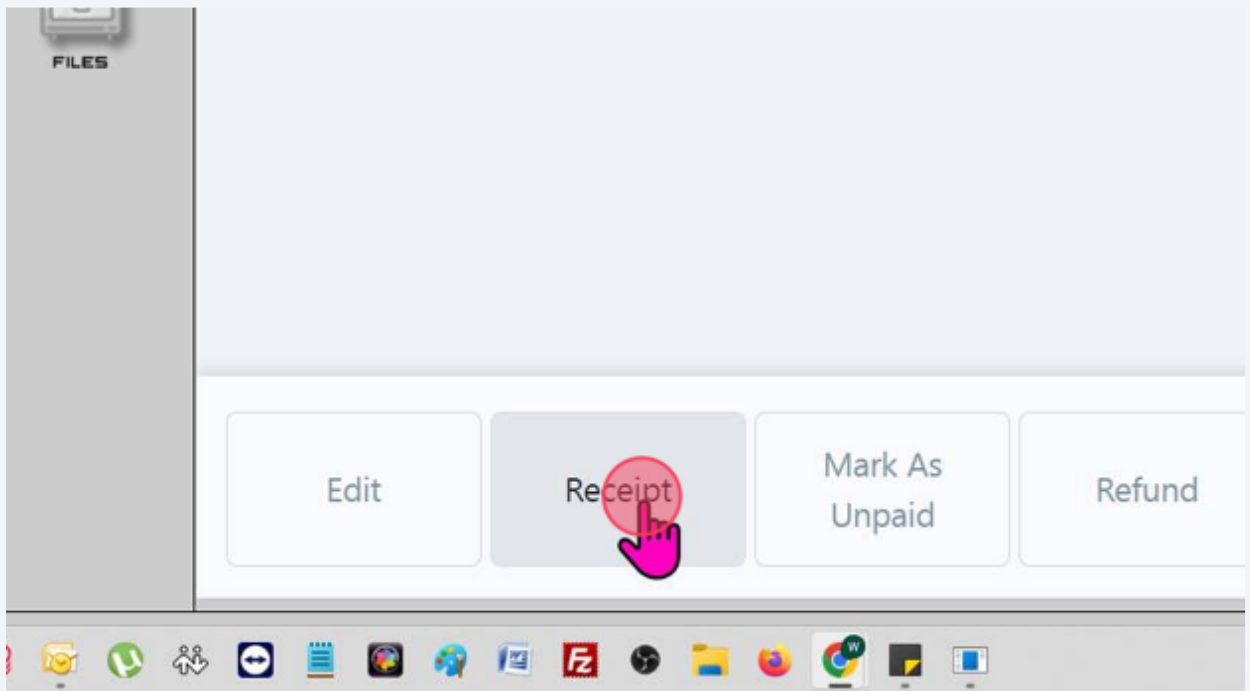
115 Choose a date.



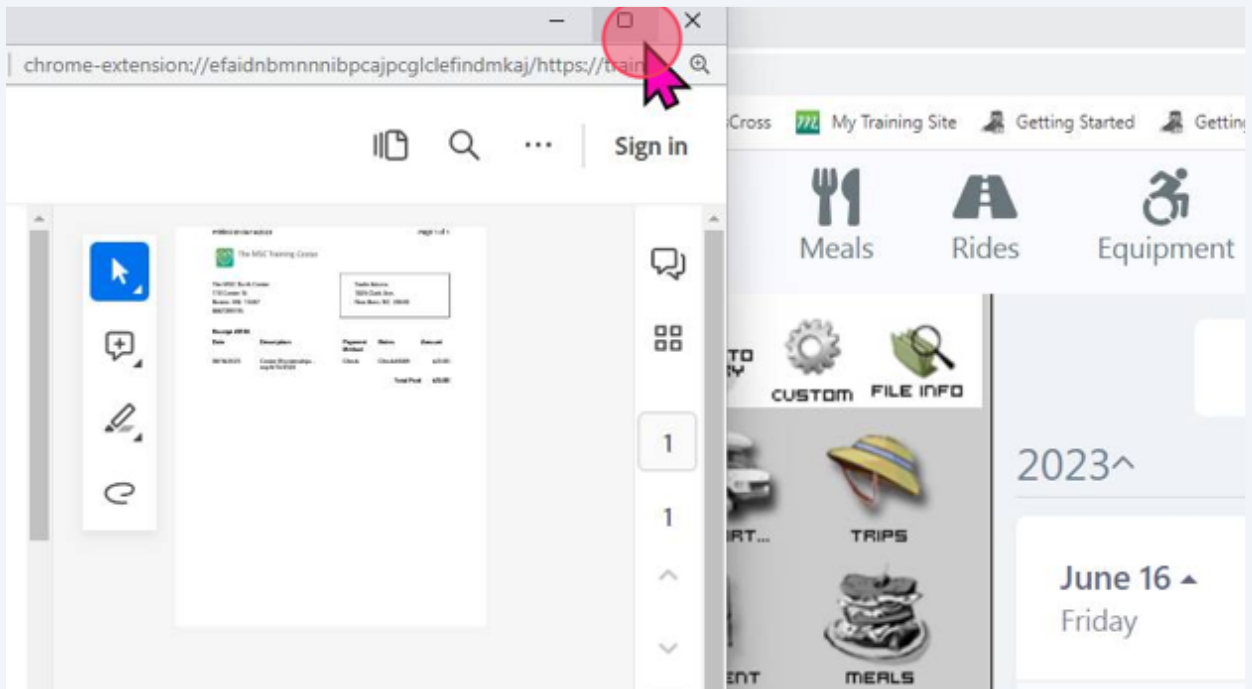
116 Choose a receipt



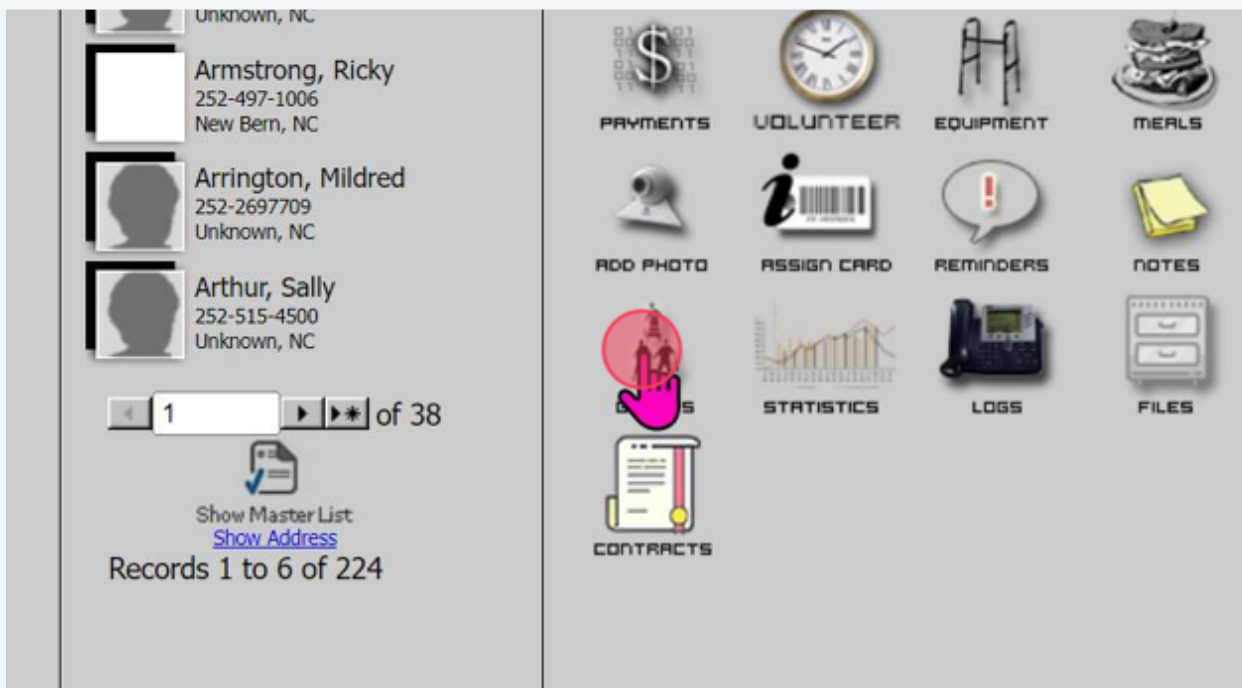
117 Click "Receipt" At the bottom



118 Receipts can either be printed or downloaded as a PDF.



119 Click Back on their groups icon



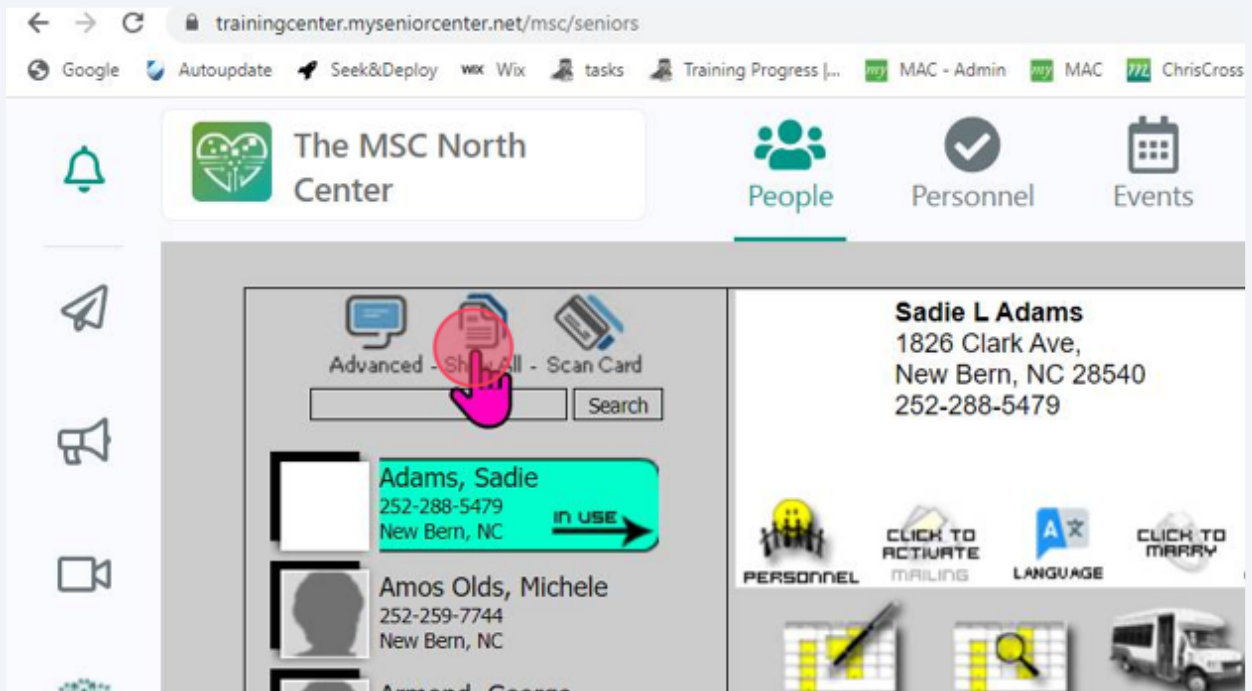
120

Here we can see there new expiration date and when they're ready to renew, instead of checking the box we simply click the renew button



121

Click show all above the search box



122 Click "Groups"

Unknown, NC

Armstrong, Ricky
252-497-1006
New Bern, NC

Arrington, Mildred
252-2697709
Unknown, NC

Arthur, Sally
252-515-4500
Unknown, NC

1 of 38

Show Master List
[Show Address](#)
Records 1 to 6 of 224

- Email List
- Mailing Labels
- At Risk - Emergency Info
- Phone Logs 19
- Groups 5**
- Birthdays
- Time at Center
- Legacy Voice Connect

123

Here you'll see the opposite view. Before, we were looking at a list of people and the groups they belong to. Now we're looking at the groups and the people that belong to them. This is where we can perform a bunch of different actions like printing or exporting to excel.

The MSC North Center

People Personnel Events Meals Rides Equipment Reminders

Groups

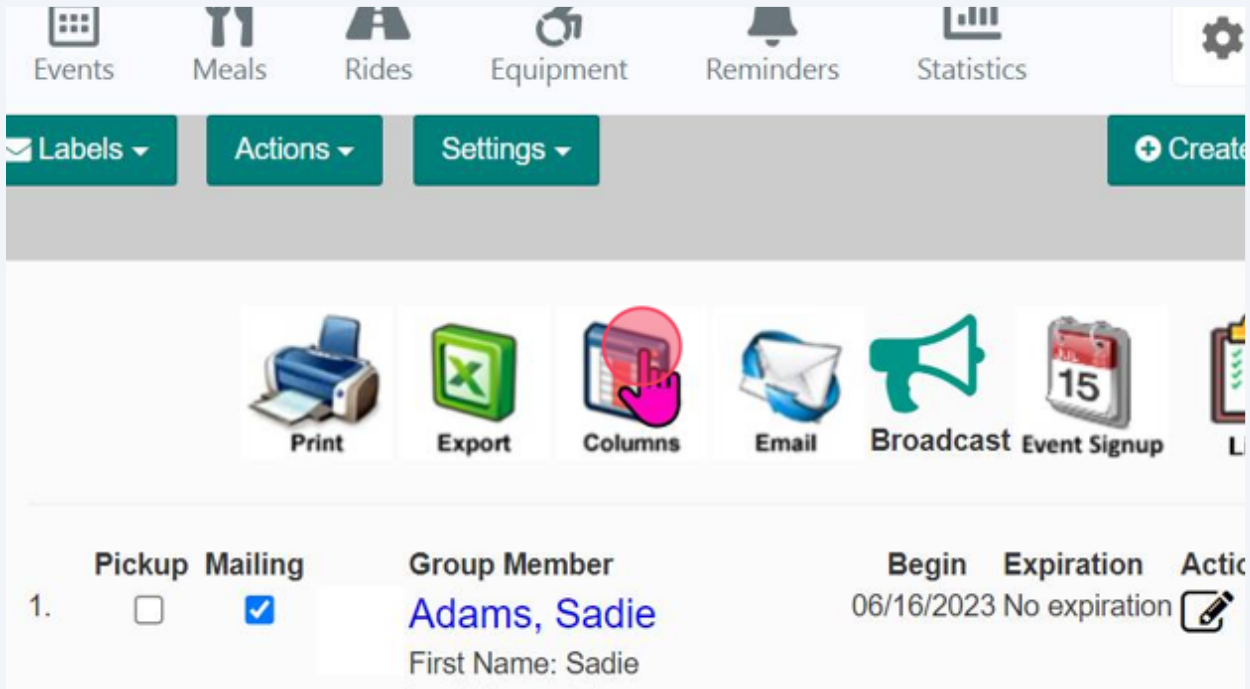
Select a group

- Broadcast Testers
- Capital Building Campaign
- Center Memberships**
- Knitting Club Call Group
- Newsletter - Postal

Print Export Columns Email

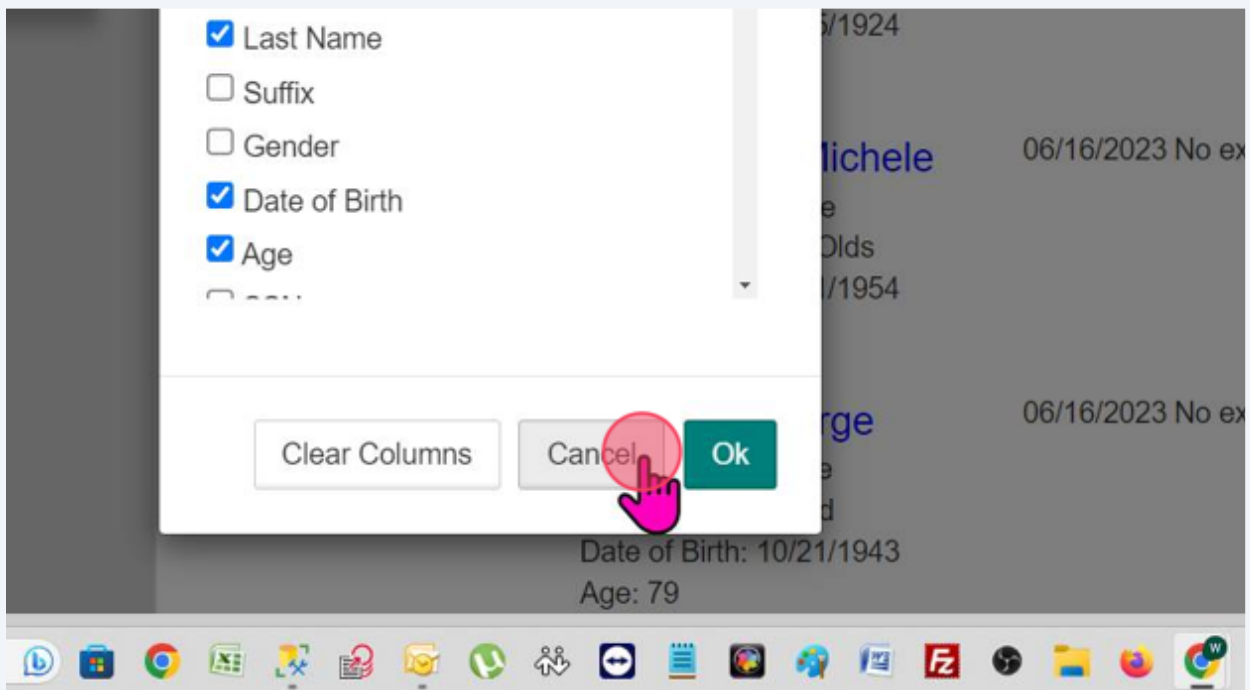
Pickup	Mailing	Group Member	
1.	<input type="checkbox"/>	Adams, Sadie First Name: Sadie Last Name: Adams Date of Birth: 05/25/1924 Age: 99 Joined Date:	06/

124 You can customize your excel export by clicking on columns icon.



125 Here you can choose from their file info fields and custom fields and completely customize your exported excel sheet.

Click "Cancel"



126

If you prefer to send emails using a 3rd party program like male chimp, simply click on the email button to get a list of email addresses that you can copy and paste into that third party program.

Mailing	Group Member	Begin	Expiration	Actions
<input checked="" type="checkbox"/>	Adams, Sadie First Name: Sadie Last Name: Adams	06/16/2023	No expiration	

127

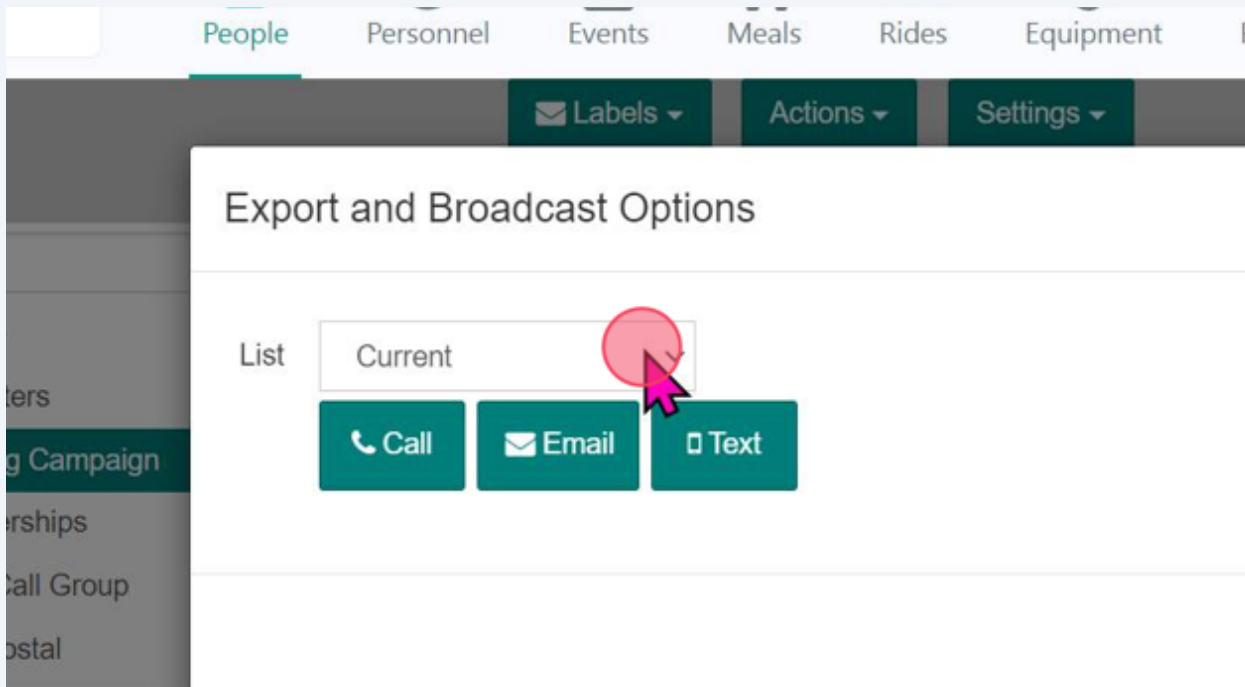
Click the broadcast button

Mailing	Group Member	Begin	Expiration	Actions
<input checked="" type="checkbox"/>	Adams, Sadie First Name: Sadie Last Name: Adams	06/16/2023	No expiration	

128

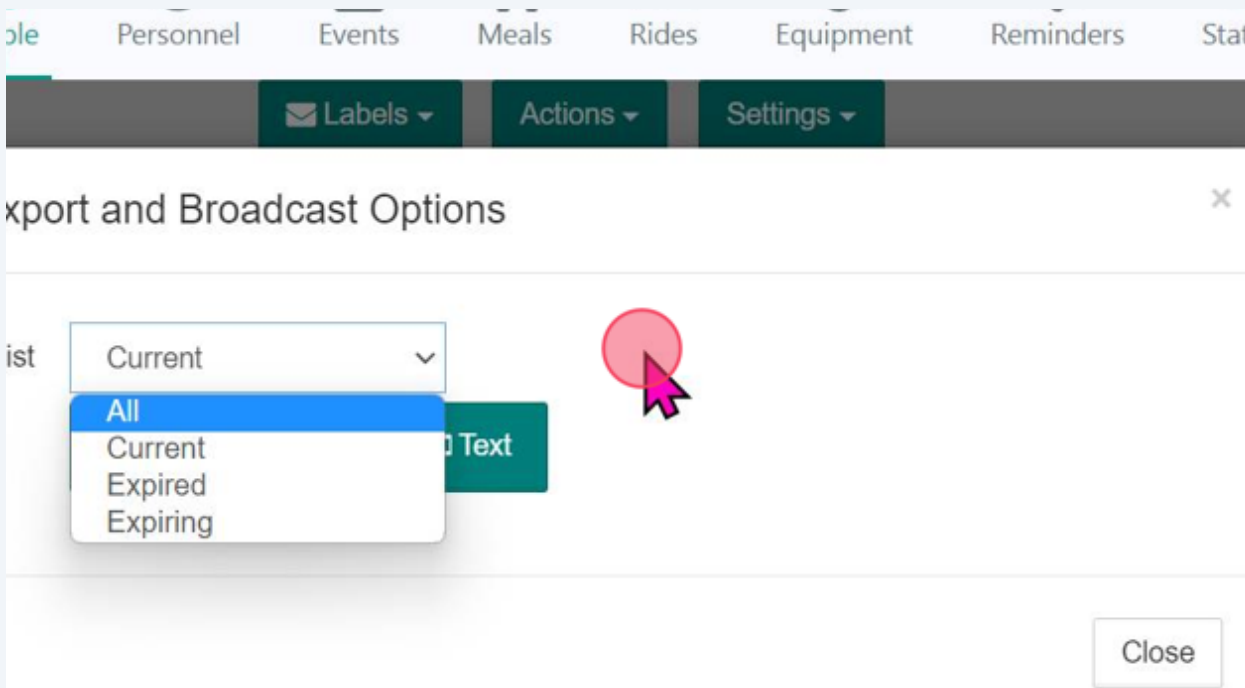
From here you can send a call, email, or text to everyone in the group.

Click the drop down list.

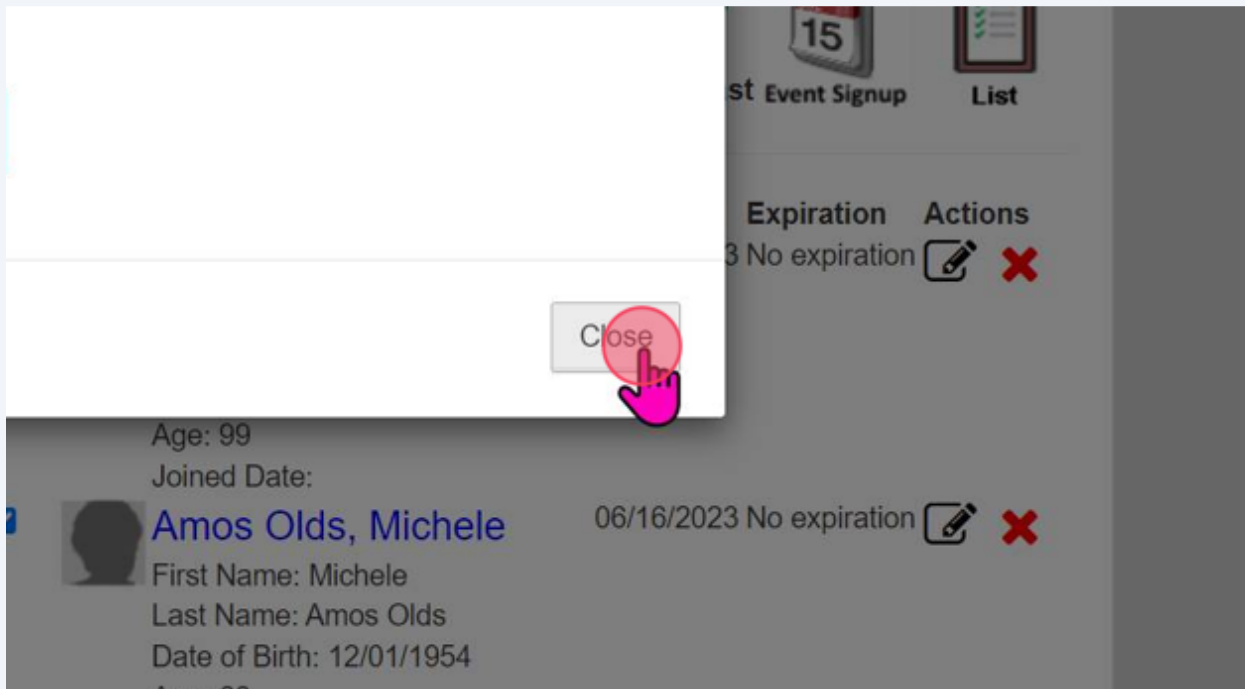


129

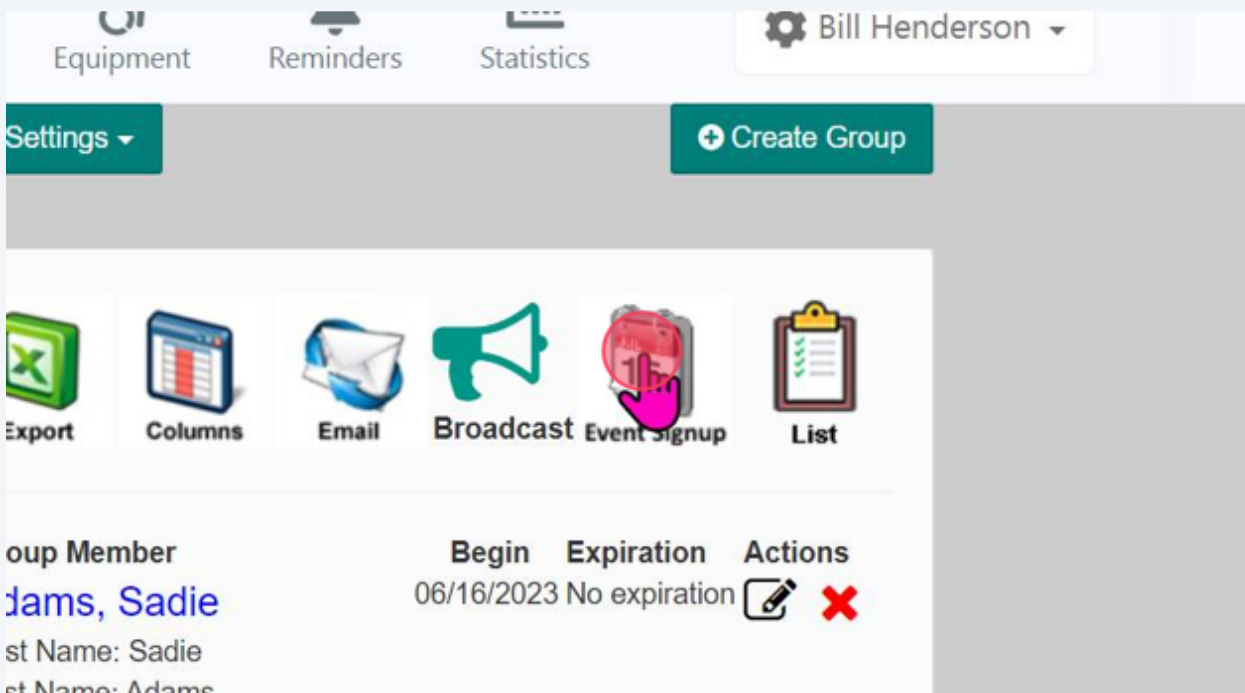
For your membership group you'll be able to decide if you want to send the broadcasts out to everyone, just people that are current on their membership, just people that have expired or people that are going to be expiring within a future date range.



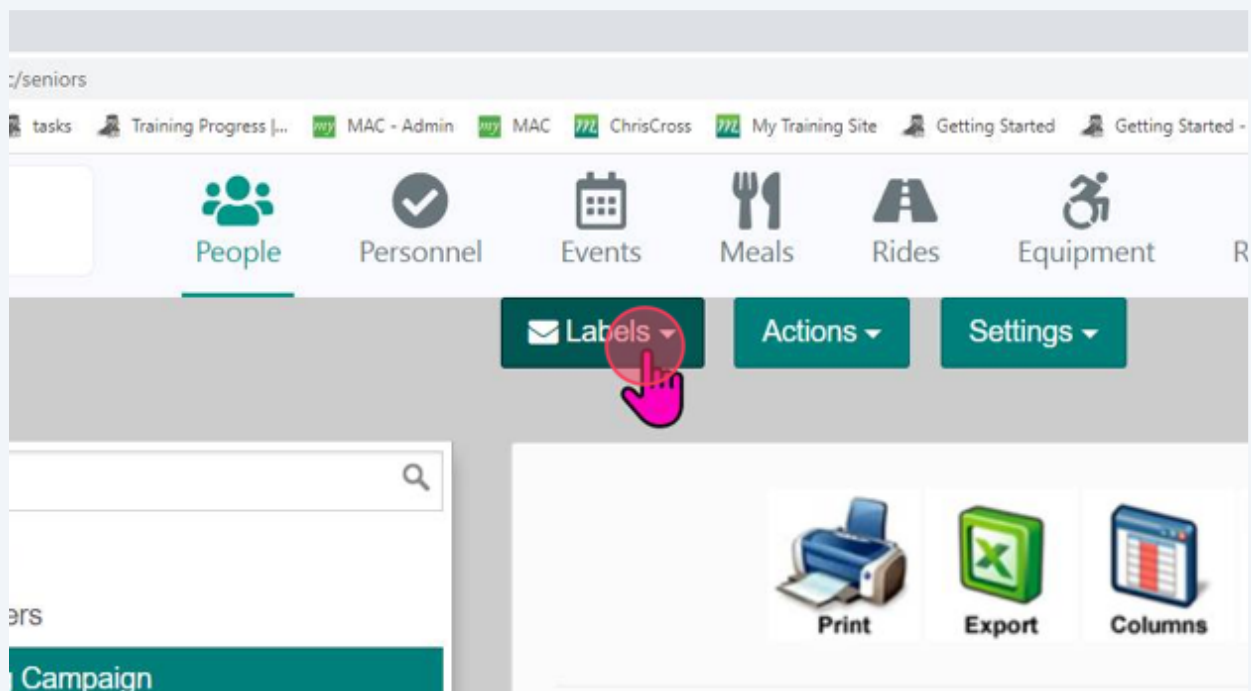
130 Click "Close"



131 Clicking event signup will bring to your list of events so you can register the people in this group for events as a group instead of individuals. It's a shortcut for adding groups of people to rosters.

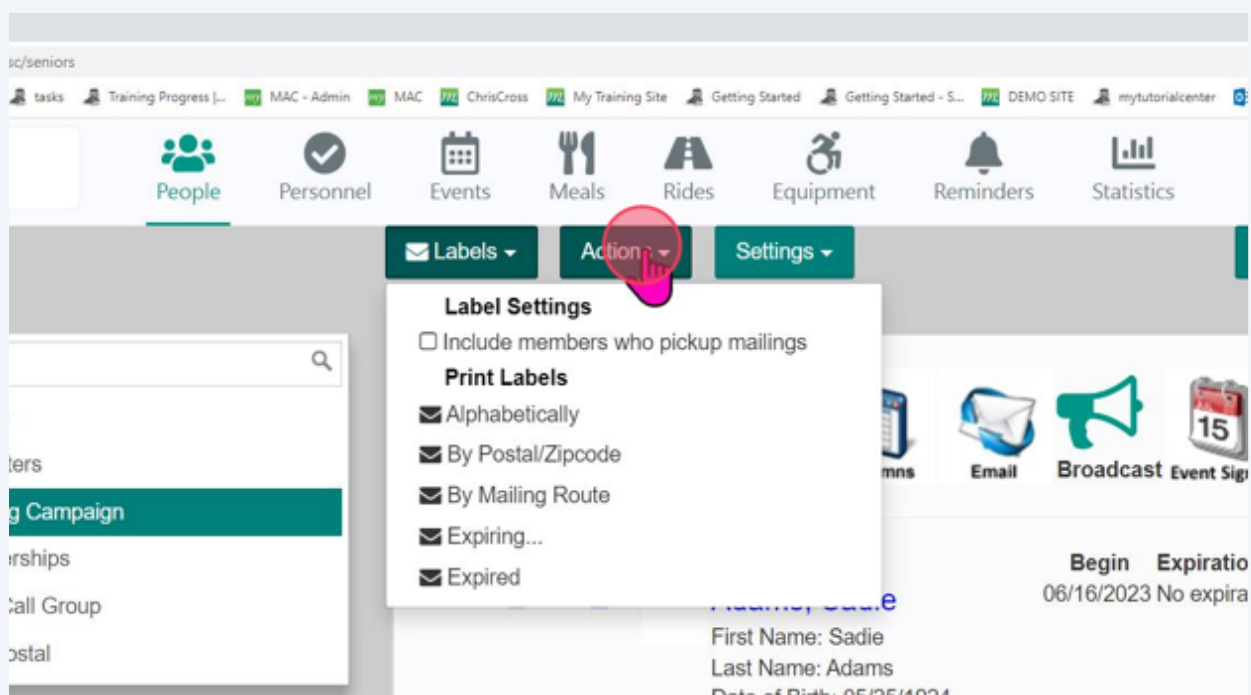


132 Click " Labels "



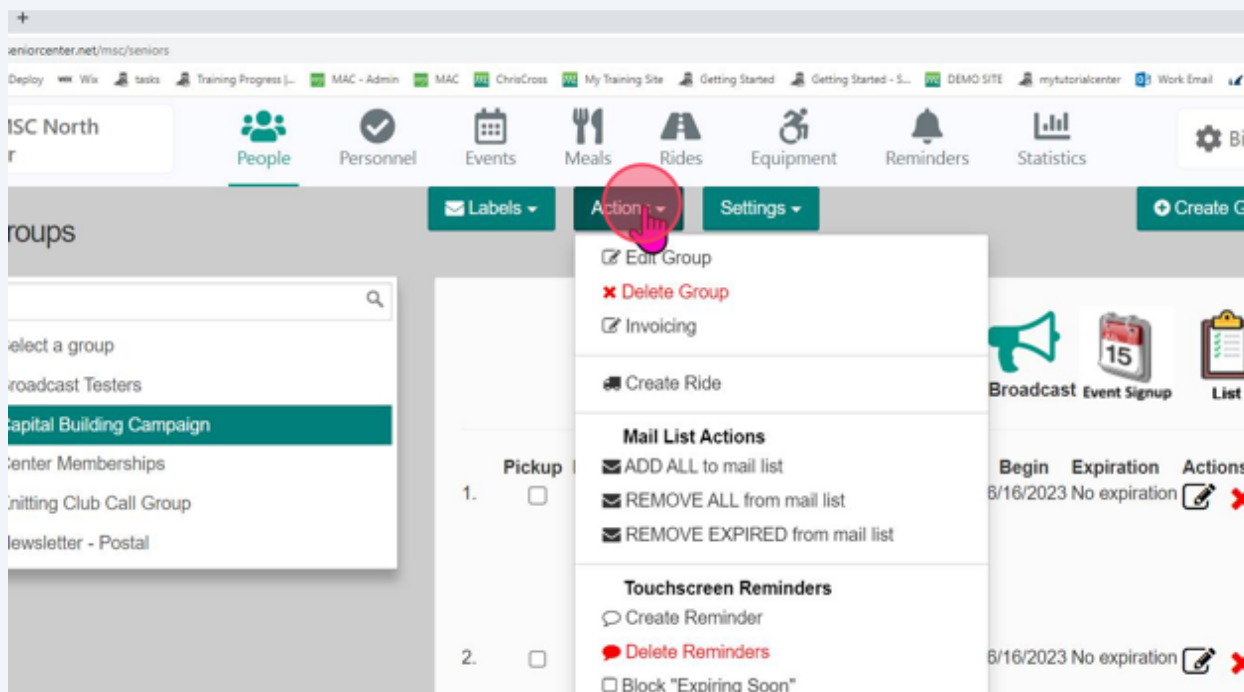
133 Here you have various choices for printing out mailing labels including the same choices you have with broadcasts.

Click the actions drop down



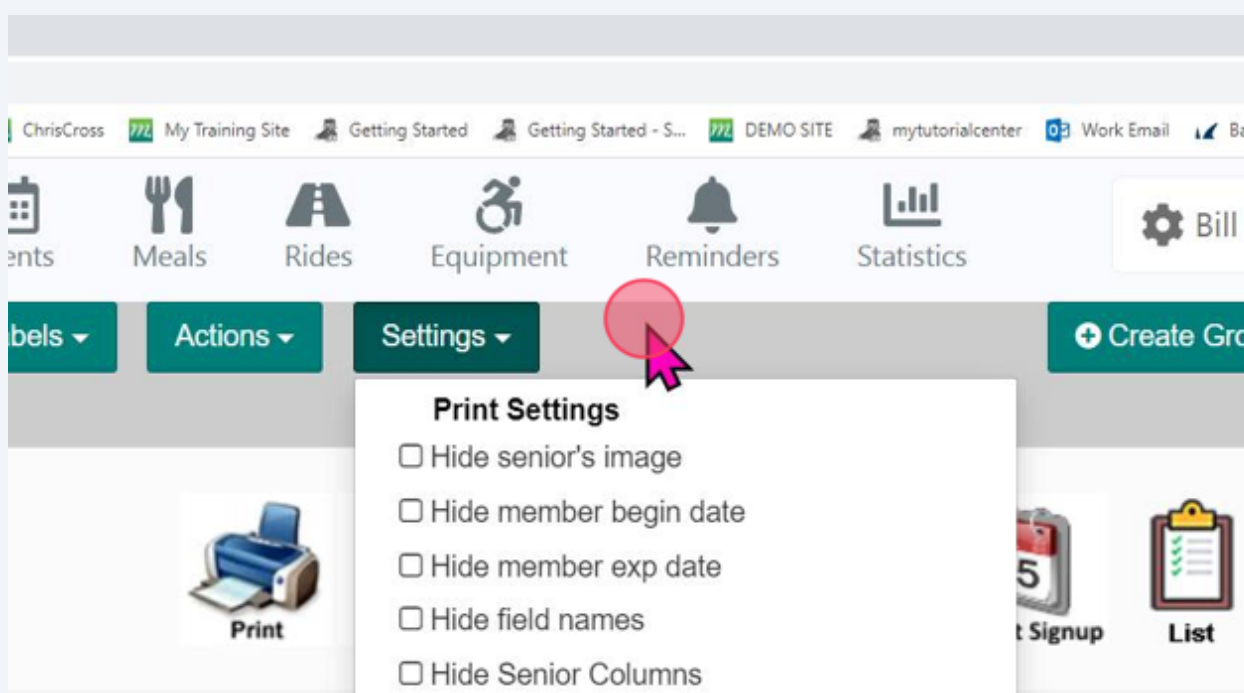
134

Here you can edit the group, delete the group, create invoices for the group as a group and create a ride for everybody all together as a group. You have some different mailing list actions and you can create a touch screen reminder that will pop up on the touchscreen the next time anybody in this group checks in.

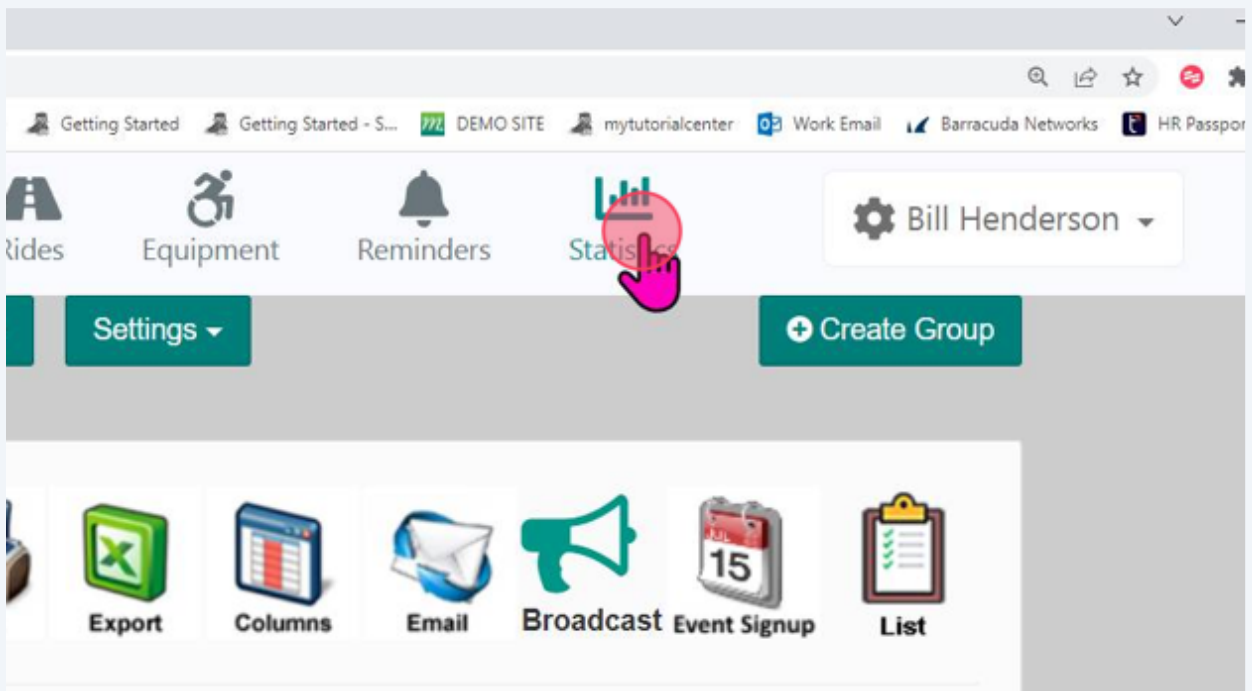


135

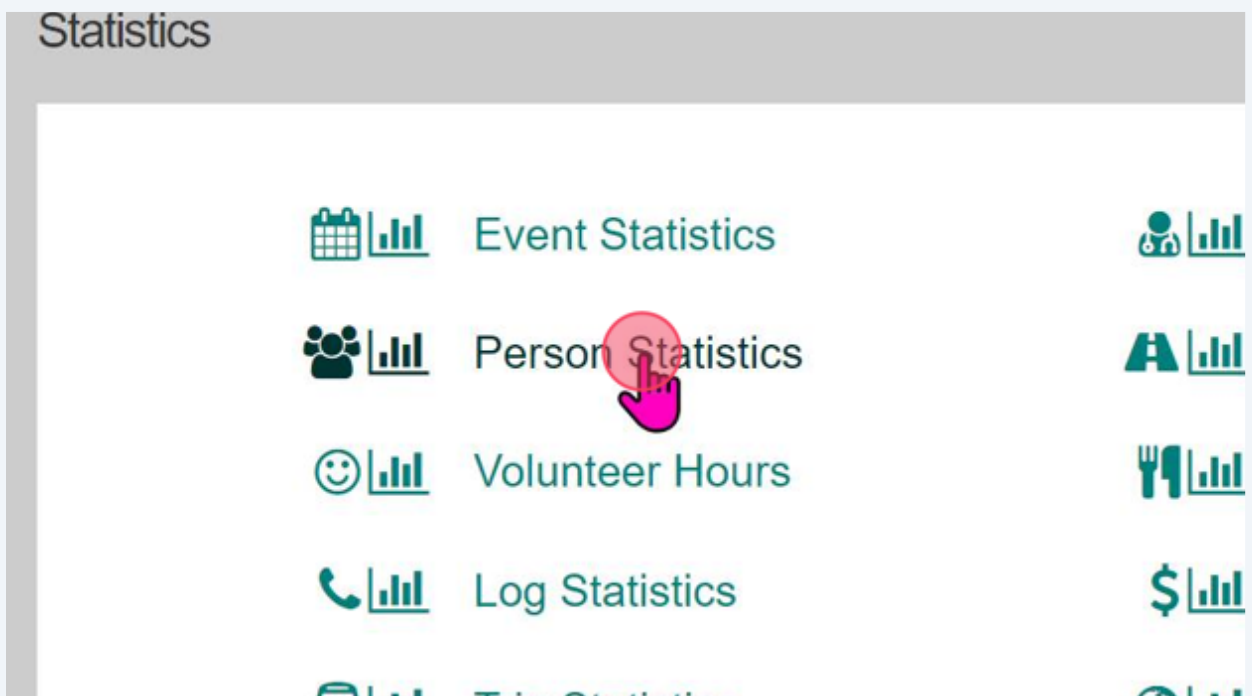
Under settings you'll find some different print options as well.



136 Click the statistics tab



137 Click "Person Statistics"



138 Click "Filters"

The screenshot shows a web application interface for 'Person Statistics'. At the top, there is a dark navigation bar with a 'dow' label. Below it, the title 'Person Statistics' is displayed in a large green font. A sidebar on the right contains icons for 'Meals' (fork and knife) and 'Ride' (bicycle). The main content area features a sub-header 'Person Statistics' and a 'Selected Date' field. Below this, there are three icons: 'Filters' (a folder with a hand cursor pointing to it), 'Settings' (a gear), and 'Columns' (a table icon). The main data area shows a summary: 'People that were active between 01/01/2023 and 03/31/2023'. Underneath, the 'Filters' section is expanded, showing 'Age: >= 0' and 'Site(s): The MSC North Center'. On the left side of the main area, there are options for time periods: 'y', 'erday', 'Week', 'Week', and 'Month'. The sidebar also includes icons for accessibility (person with a circle) and a fork and knife icon.

139

If you scroll through the filters you'll find the group's section where you can choose to get results on people that are in a certain group, not in a certain group or in one or more groups. You could also choose to only get current members for that group meaning if you have chosen a membership group, their membership is current. These filters show up in all of the statistics.

State/Province: [Load Values...](#)

Zip/Postal Code: [Load Values...](#)

Group

Group: Any
 In Group
 Not In Group
--Select Group--

In Group (1 or more): [Load Values...](#)

Current Member: Current for selected group(s) as of 6/16/2023

NAPIS

Living Arrangement: Select All/None
 lives alone
 lives with someone

140

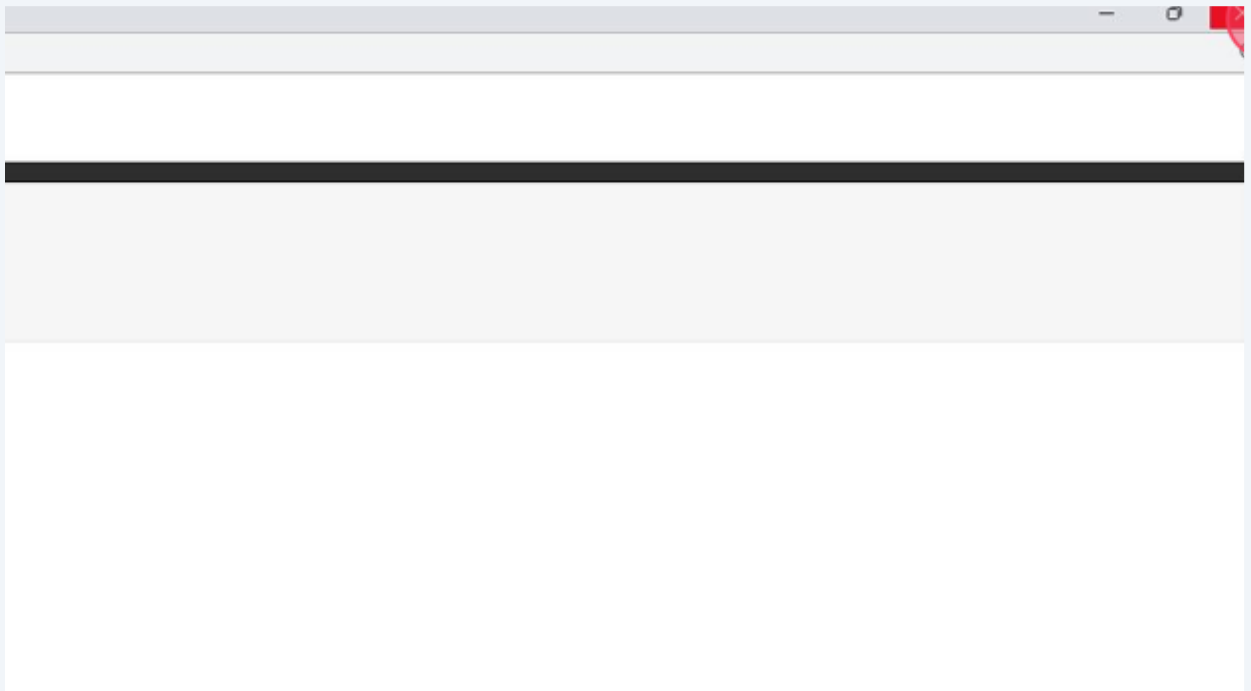
Click "Cancel"

ling Campaign
berships
o Call Group
Postal
e
someone

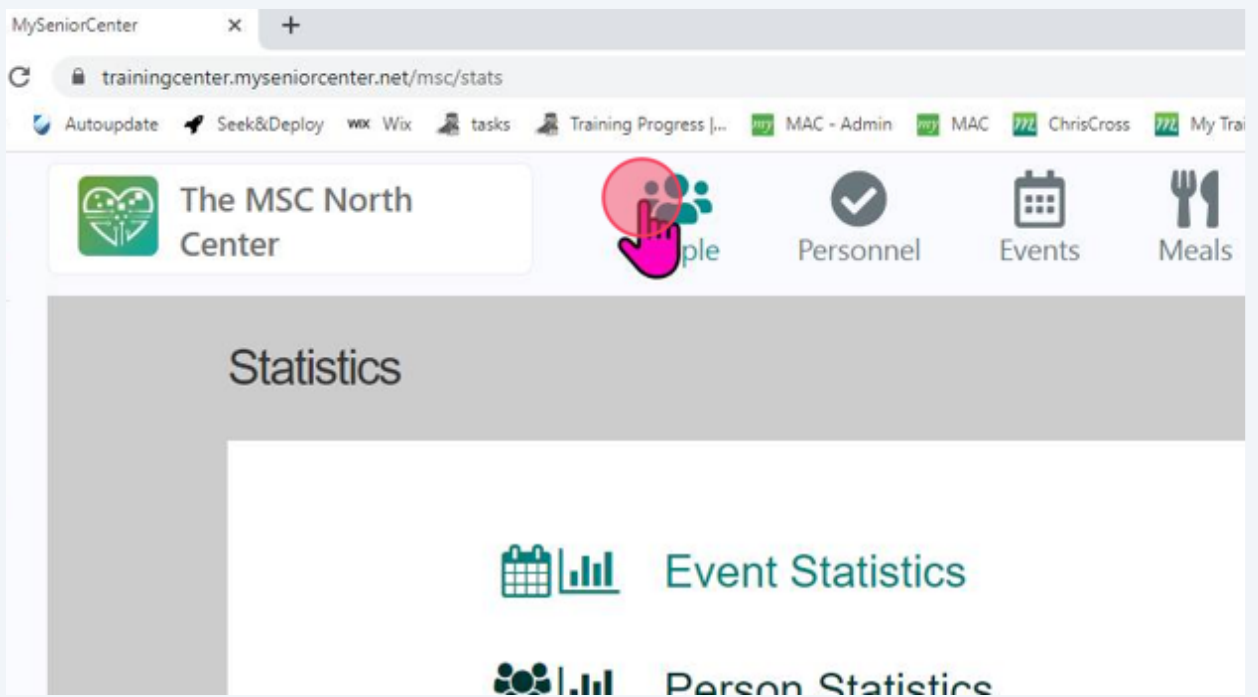
6/2023

Clear Filters Ok Cancel

141 Close the window



142 Go back to the people tab.



The Add Photo Icon

143 Click Add photo

The screenshot displays a software interface with a list of names on the left and a grid of icons on the right. A red circle highlights the 'ADD PHOTO' icon, which is being pointed to by a hand cursor. The list of names includes:

- Ruattis, Debie
252-288-5479
New Bern, NC in use
- Amos Olds, Michele
252-259-7744
New Bern, NC
- Armond, George
Unknown, NC
- Armstrong, Ricky
252-497-1006
New Bern, NC
- Arrington, Mildred
252-2697709
Unknown, NC
- Arthur, Sally
252-515-4500
Unknown, NC

Below the list, there is a page indicator showing '1 of 38' and a 'Show Master List' button with a 'Show Address' link. At the bottom, it says 'Records 1 to 6 of 224'.

The grid of icons includes:

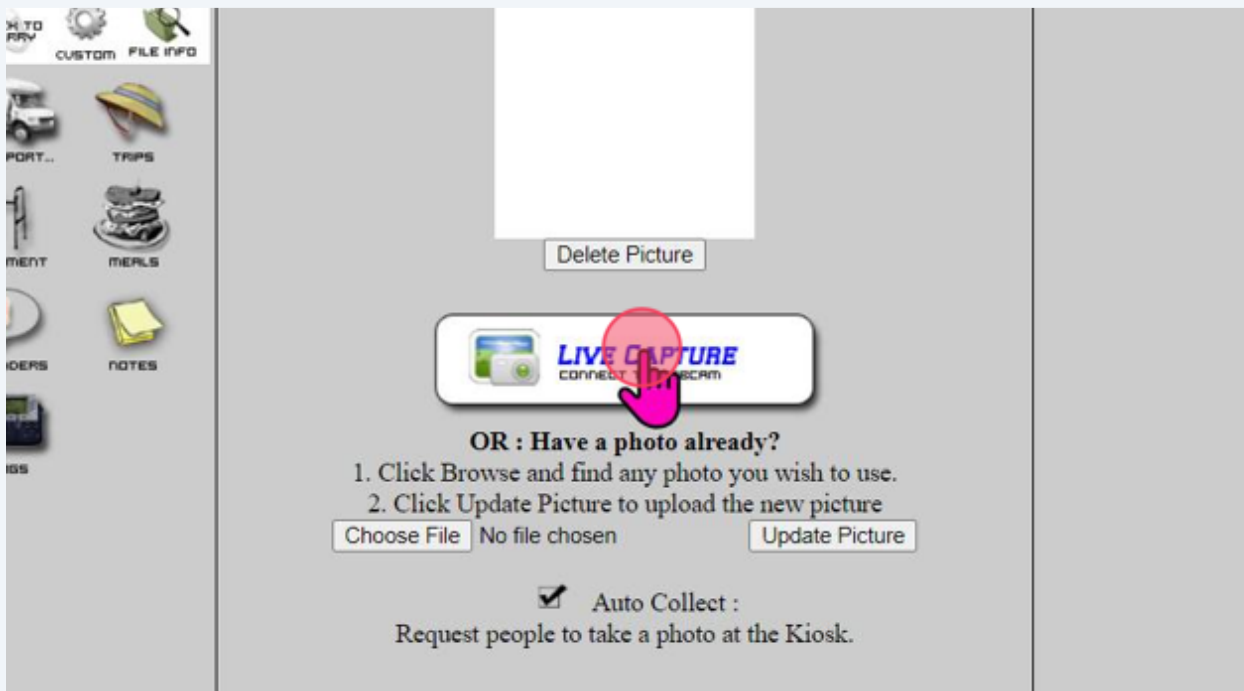
- CLICK TO ACTIVATE PERSONNEL
- CLICK TO ACTIVATE MAILING
- LANGUAGE
- CLICK TO MARRY
- CUSTOM
- FILE INFO
- REGISTER
- VIEW EVENTS
- TRANSPORT...
- TRIPS
- PAYMENTS
- VOLUNTEER
- EQUIPMENT
- MEALS
- ADD PHOTO (highlighted)
- ASSIGN CARD
- REMINDERS
- NOTES
- GROUPS
- STATISTICS
- LOGS

On the right side of the interface, there is a sidebar with the following text:

- Emergency
- Jack Johnson
- Primary (Home)
- NOTE
- 1. 6/16/2023 - Gener
- SERV
- 1. Family S
- Friday, Ju
- Show More (10
- Show All

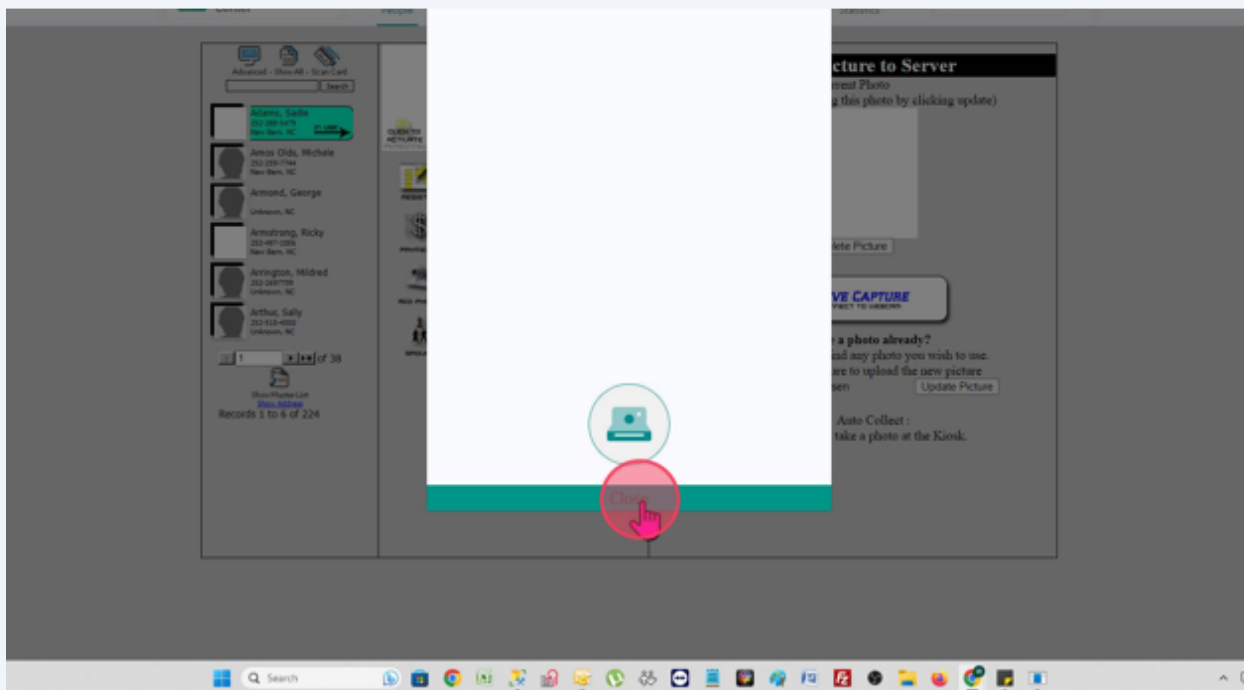
144

Here you can click live capture to take a photo of the person as long as you have a web cam connected to the computer that you are currently using. When you click Live Capture you'll get a pop up window and your computer should ask for permission to use your camera. Make sure to say yes.

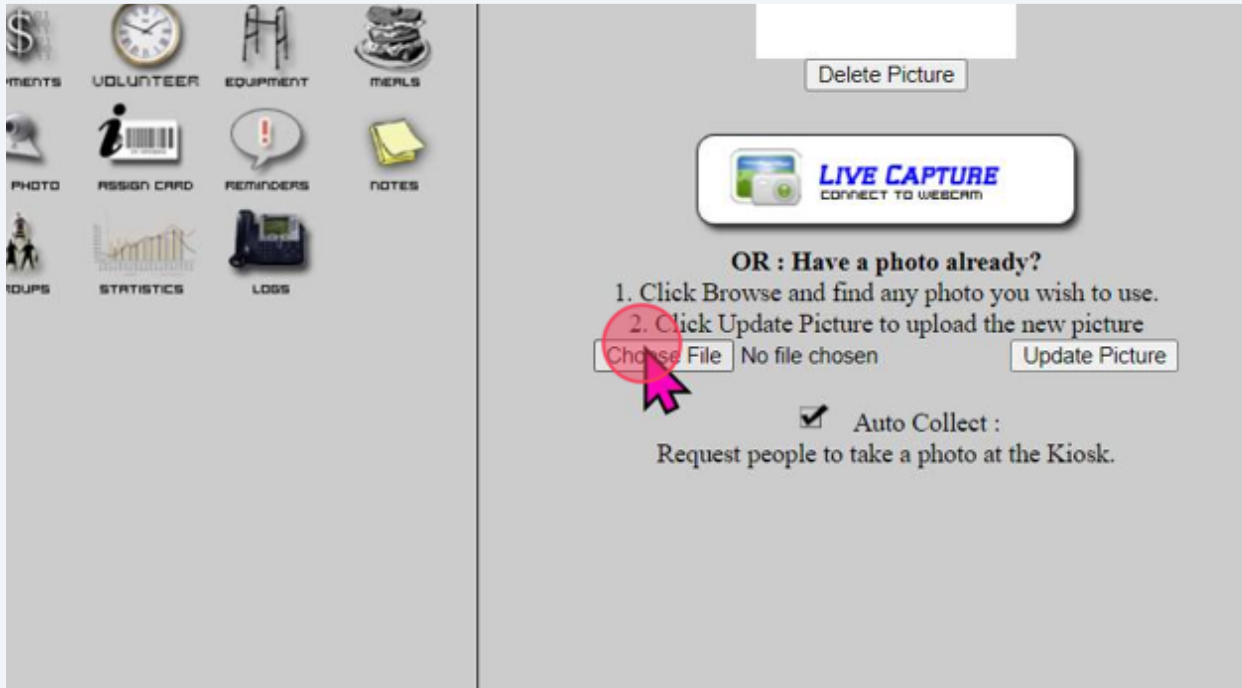


145

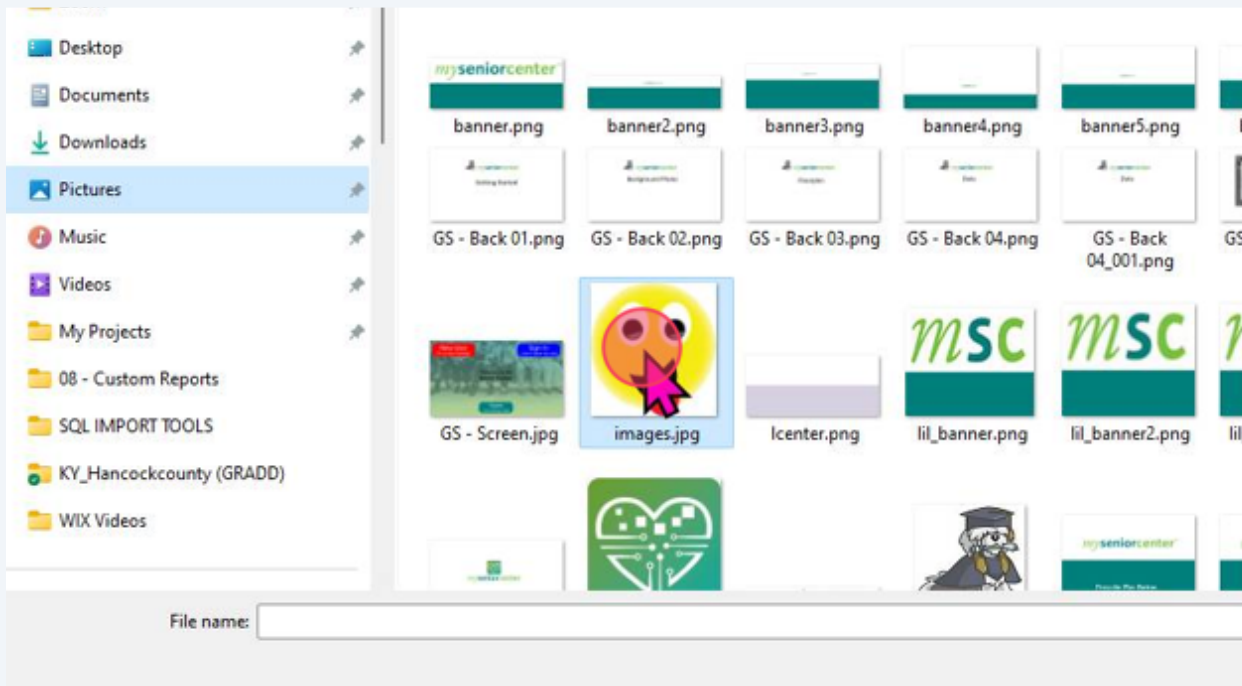
Now you'll see the person's face on the screen and you can click the green camera icon to take their picture.



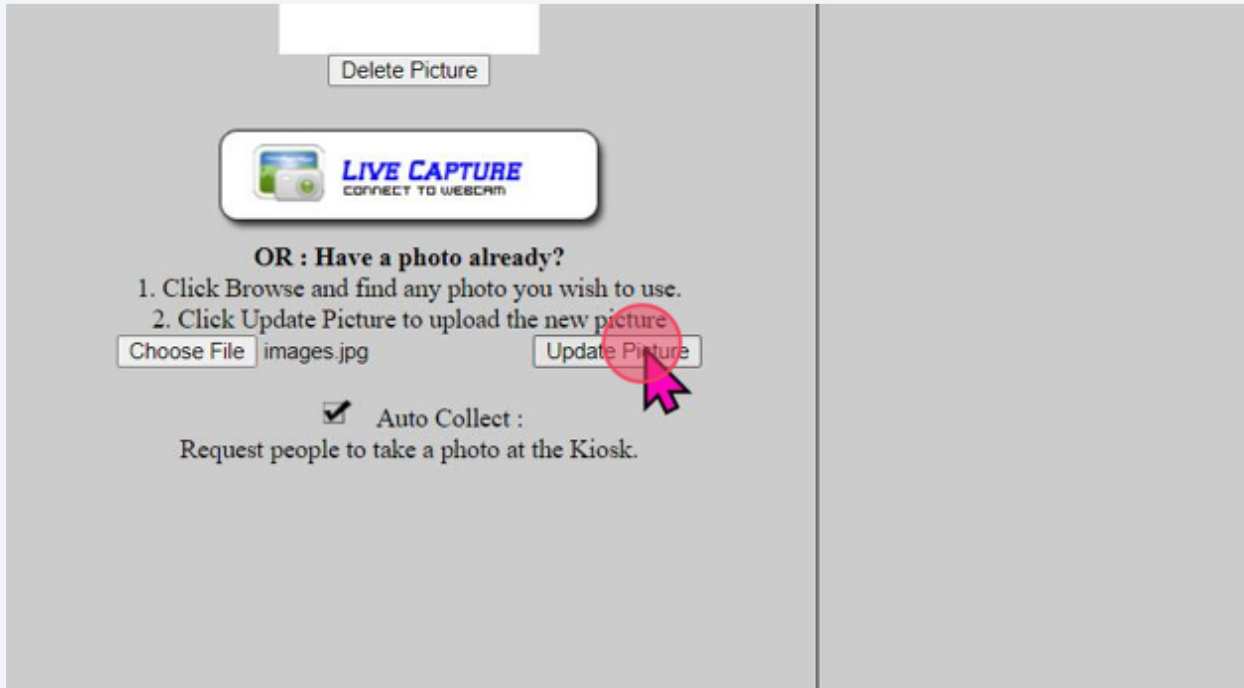
146 Alternatively you can click "Choose File" to upload a photo from Your computer. Click choose file.



147 Choose a picture.



148 Click "Update Picture"



149 You can also take pictures via the touch screen which will learn about in training two

The Assign Card Icon

150 Click Assign card

Adams, Sadie
252-288-5479
New Bern, NC

Amos Olds, Michele
252-259-7744
New Bern, NC

Armond, George
Unknown, NC

Armstrong, Ricky
252-497-1006
New Bern, NC

Arrington, Mildred
252-2697709
Unknown, NC

Arthur, Sally
252-515-4500
Unknown, NC

1 of 38

Show Master List
[Show Address](#)
Records 1 to 6 of 224

CLICK TO RETURN PERSONNEL
CLICK TO RETURN TRIPLOGS
LANGUAGE
CLICK TO TRIPLOG
CUSTOM
FILE INFO

REGISTER
VIEW EVENTS
TRANSPORT...
TRIPS
PAYMENTS
VOLUNTEER
EQUIPMENT
MEALS
ADD PHOTO
ASSIGN CARD
REMINDERS
NOTES
GROUPS
STATISTICS
LOGS

1. Click Br
2. Click U
Choose File

Reques

151 Grab a card out of the the box and type the number that is on the card into the textbox to the right.

The MSC North Center

People Personnel Events Meals Rides Equipment Reminders Statistics

Bill Henderson

Advanced - Show All - Scan Card

Adams, Sadie
252-288-5479
New Bern, NC

Amos Olds, Michele
252-259-7744
New Bern, NC

Armond, George
Unknown, NC

Armstrong, Ricky
252-497-1006
New Bern, NC

Arrington, Mildred
252-2697709
Unknown, NC

Arthur, Sally
252-515-4500
Unknown, NC

1 of 38

Show Master List
[Show Address](#)
Records 1 to 6 of 224

Sadie I. Adams
1325 Clark Ave
New Bern, NC 28540
252-288-5479
Age: 99

SEARCH

X7894213 Assign ID Card

Example: X32 or X281721 or X9867

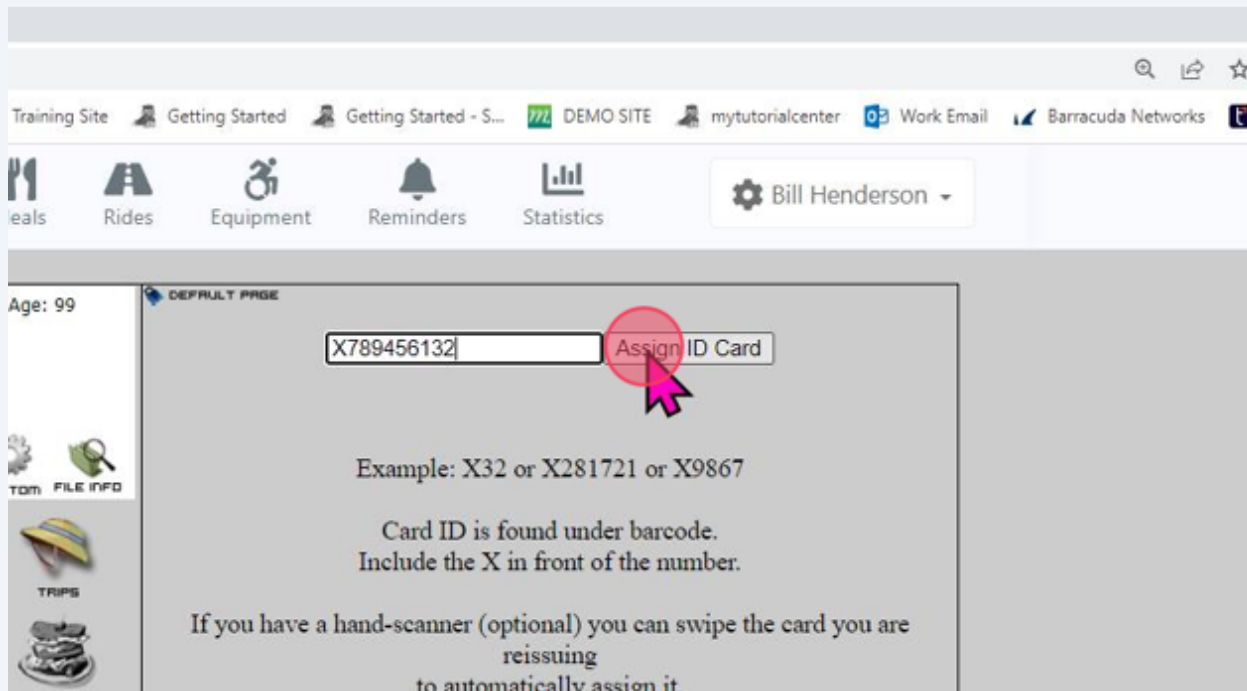
Card ID is found under barcode.
Include the X in front of the number.

If you have a hand-scanner (optional) you can swipe the card you are requesting to automatically assign it.

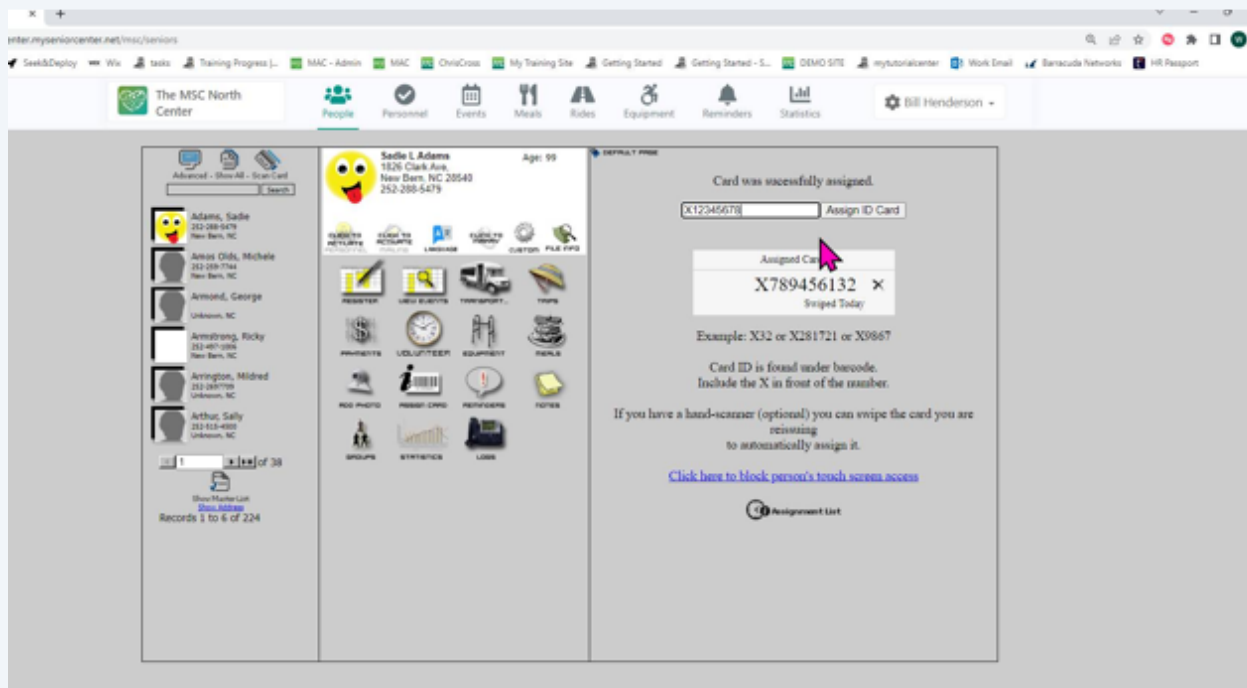
[Click here to block person's touch screen access](#)

Assignment List

152 Click "Assign ID Card".

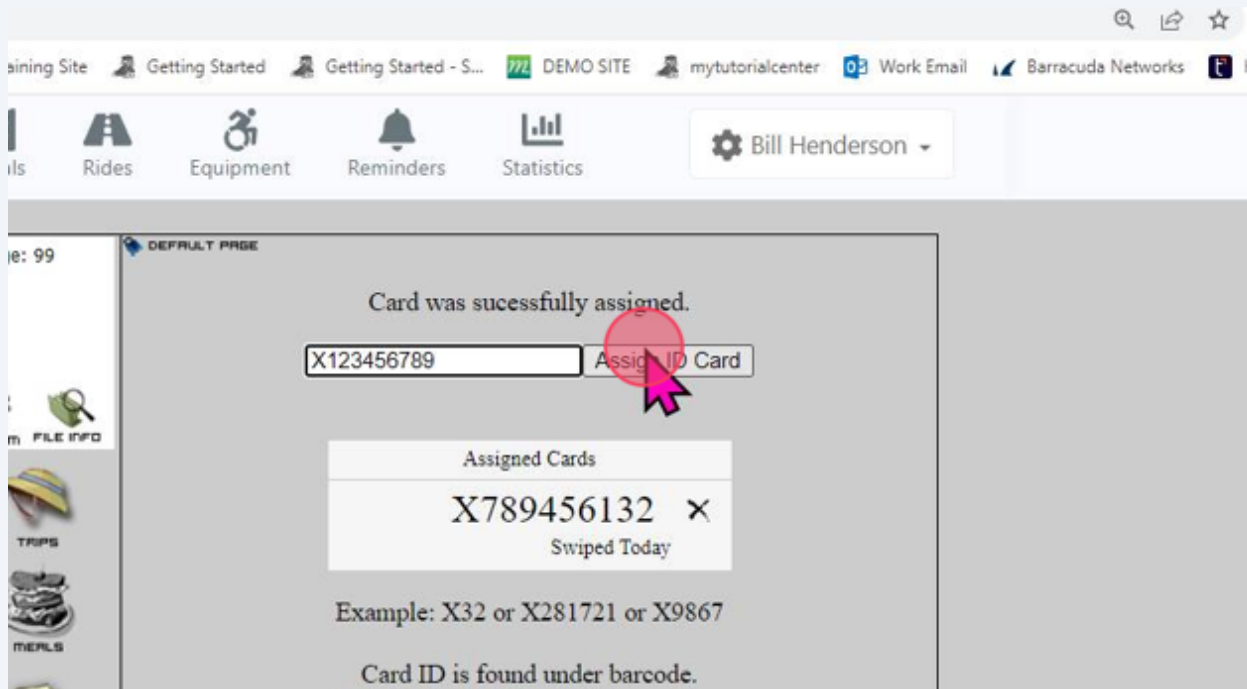


153 Immediately that card is ready to be scanned.



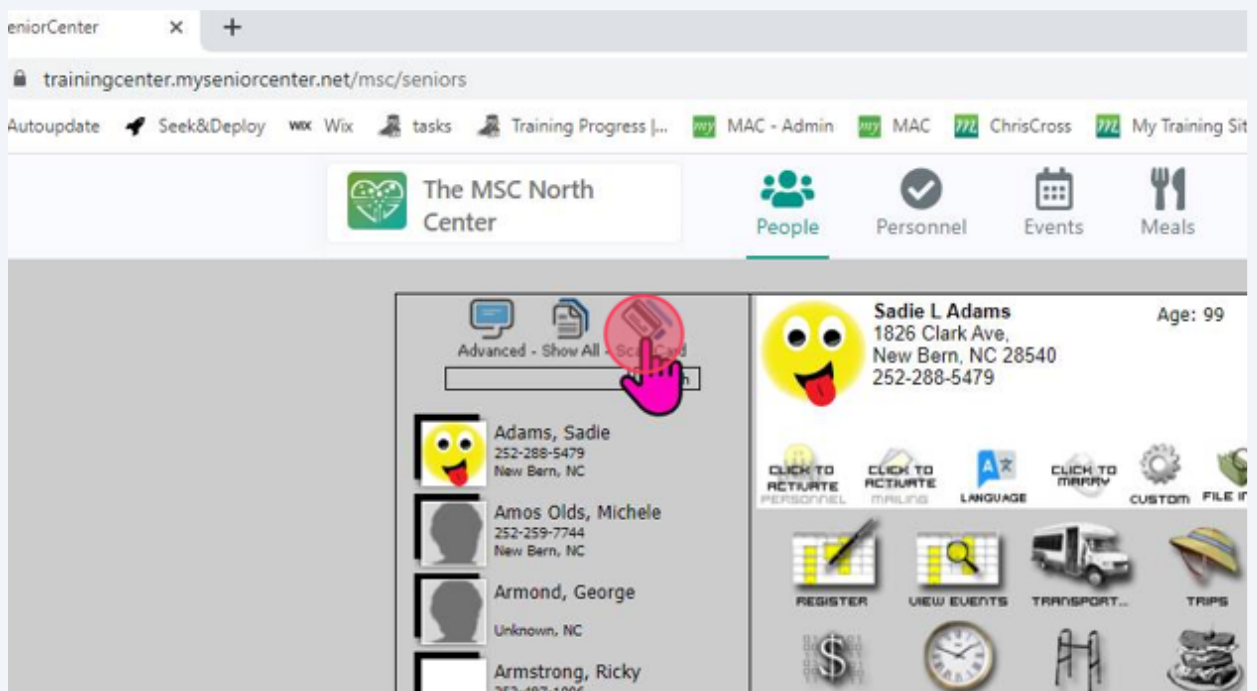
154

If they lose their card simply assign them another card. Either card will work even the old card as long as you have not deleted it. It's best to not delete it because you can search for that card's owner if it's found later on.



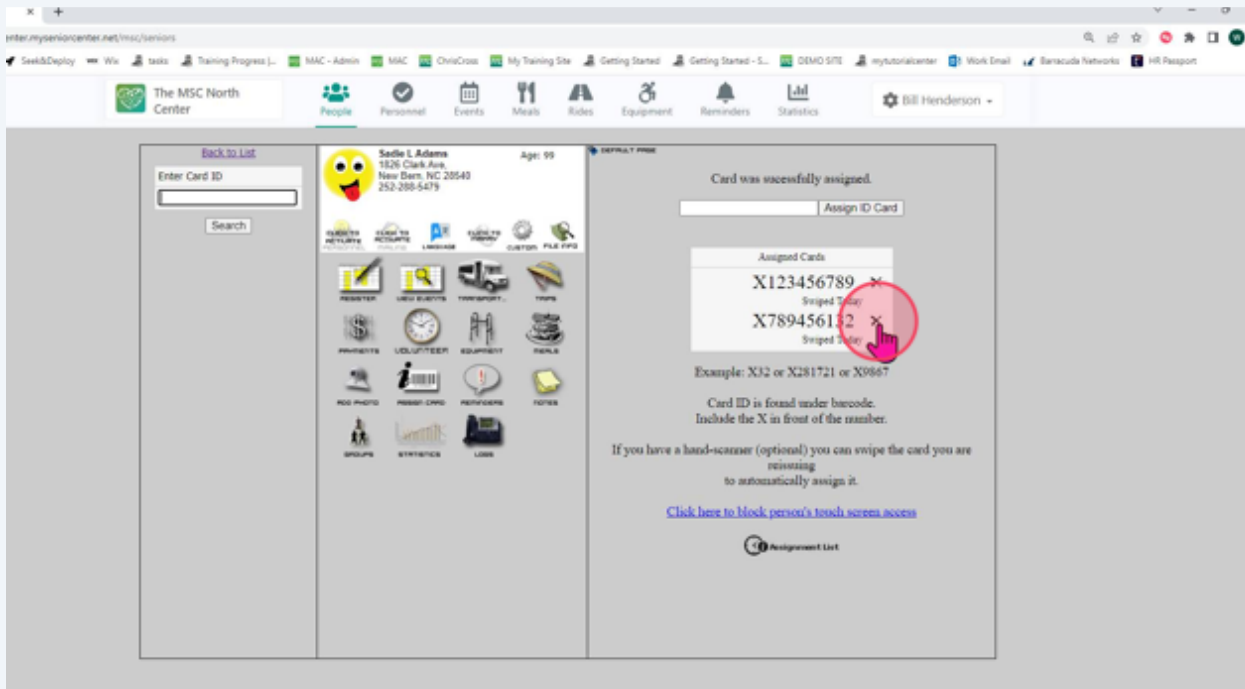
155

Click scan card above the search Box and you can type in the card number to search for who that card belongs to. If you had deleted the card and then found it you would have no way of knowing who it belongs to.



156

The only time you actually have to delete a card is if you want to recycle that card and assign it to someone else. Click the black X to delete it and now that is a blank card and can be reassigned to another person.



The Reminders Icon

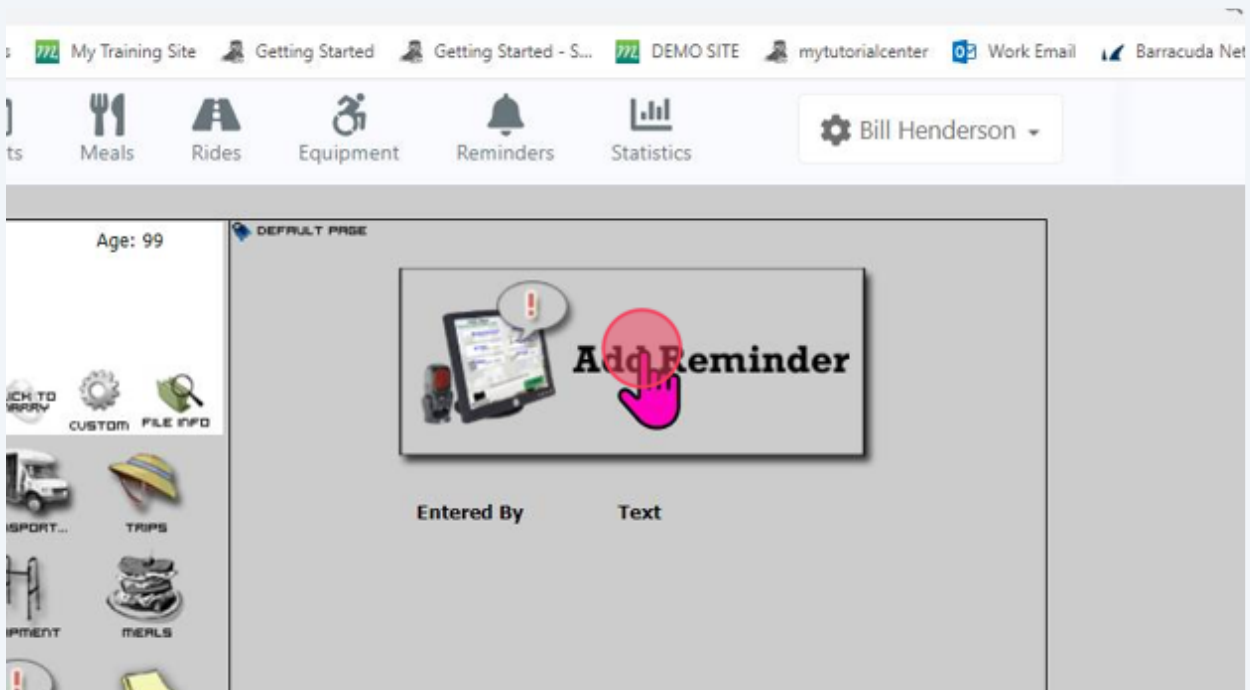
157

The reminders icon allows you to leave messages at the touch screen for the person to see the next time they scan their card. Reminders are the 1st thing they see at the touch screen. It pops up on the screen and covers the entire screen. You have to touch OK to make it disappear.

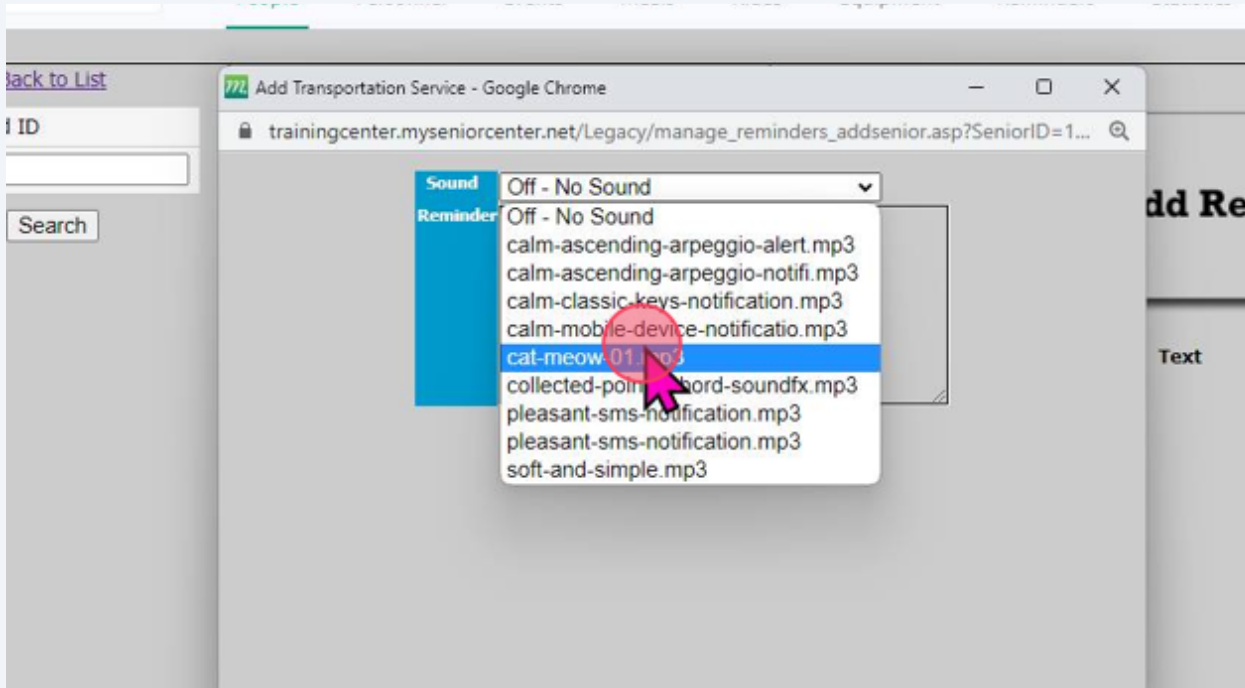


158

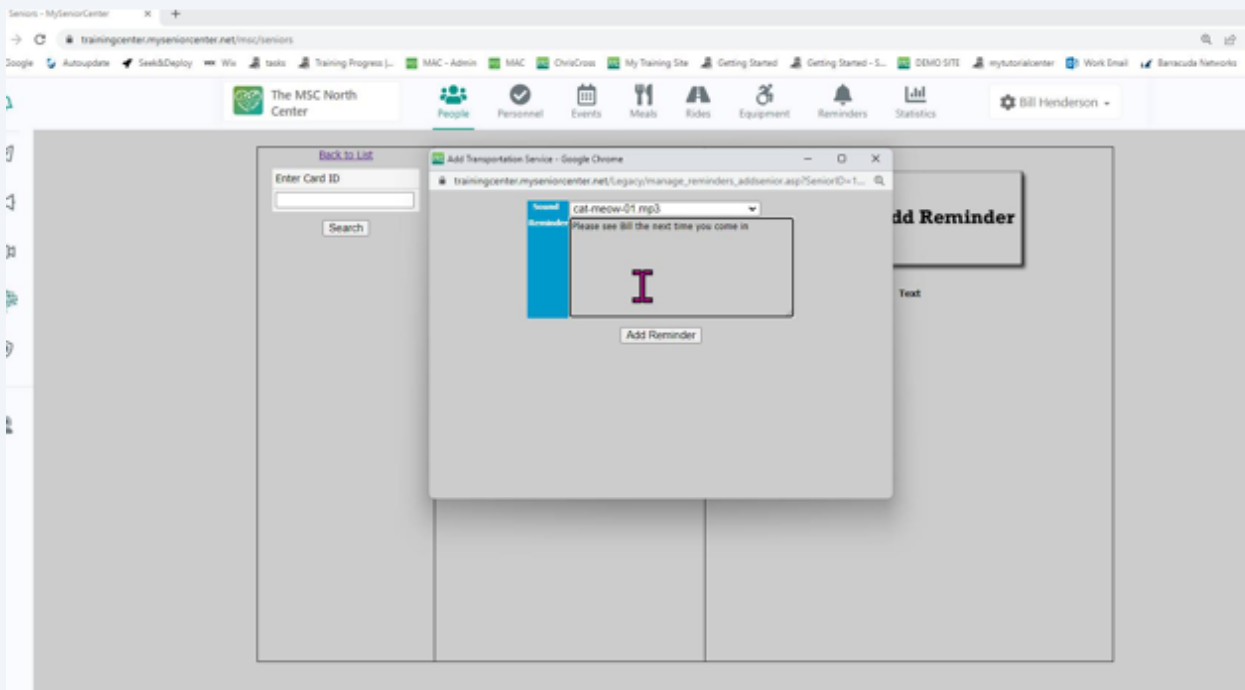
Click Add reminder



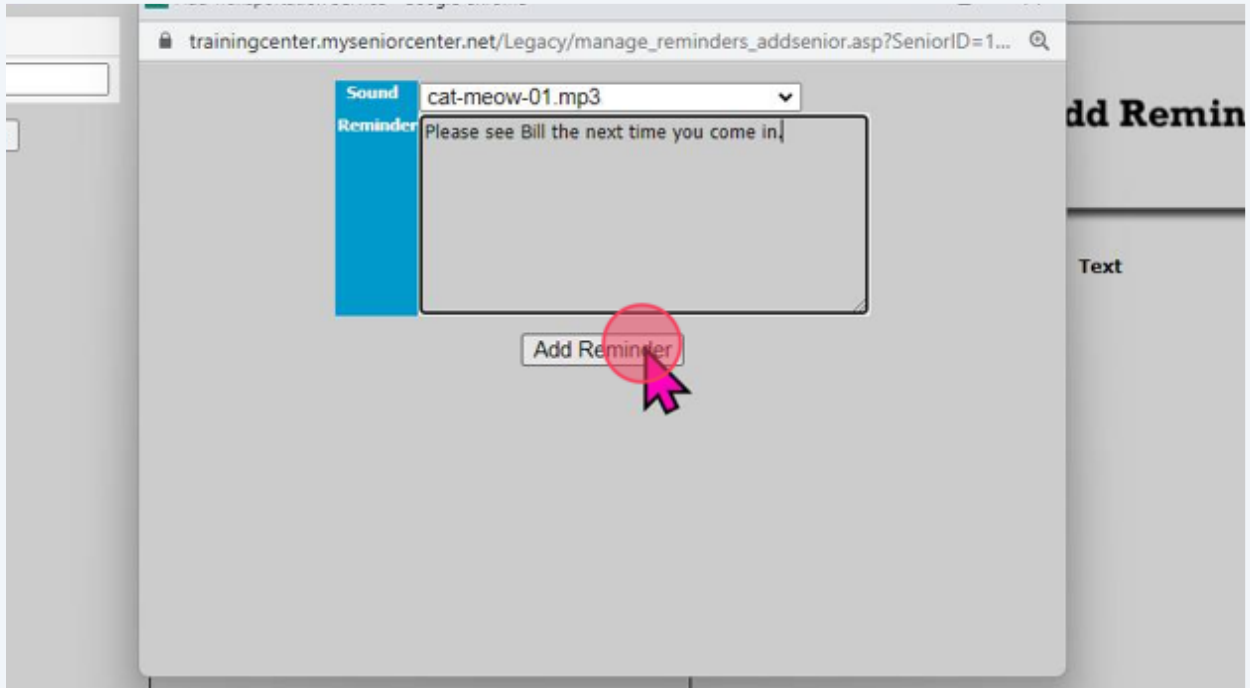
159 Choose a sound effect if you'd like. This is optional.



160 Type in your message

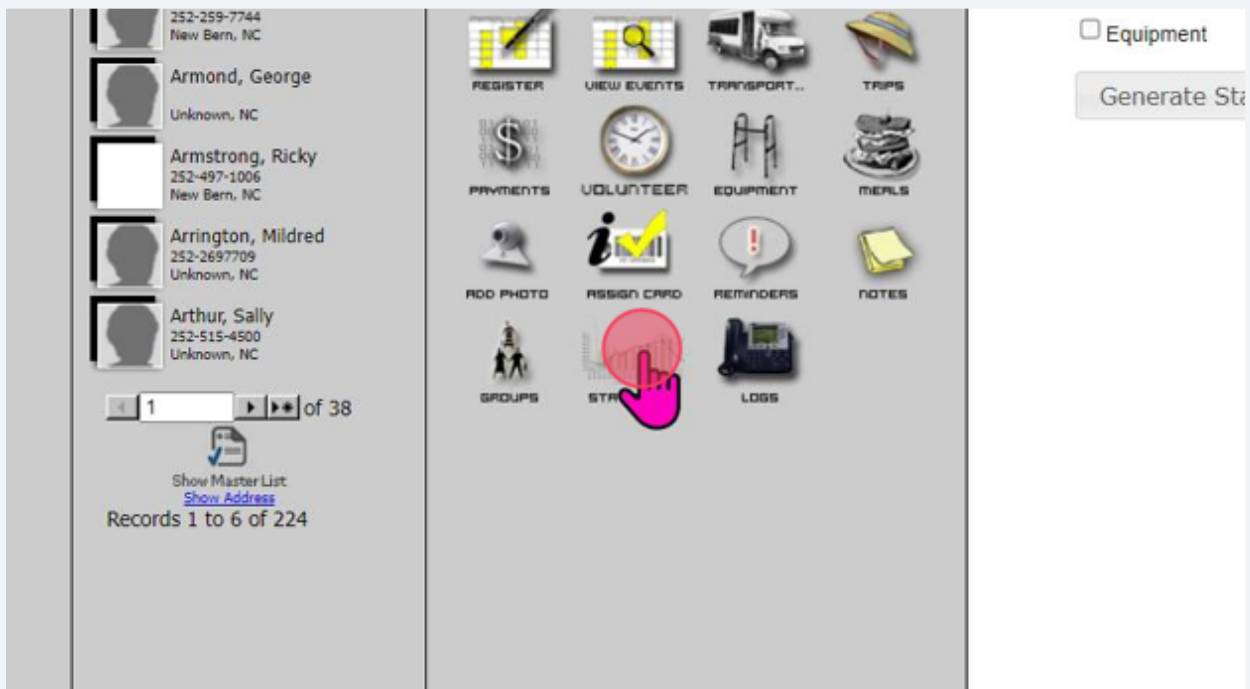


161 Click "Add Reminder"



The Statistics Icon

162 Here you can run quick statistics on any individual. Click the statistics icon.



163

Here you can choose the type of activity. You would like to see on the person and you can click either date to change the date range. Then click generates statistics.

e L Adams Age: 99
 Clark Ave,
 Bern, NC 28540
 288-5479

Activity between 01/01/2023 and 03/31/2023

Type: Event Checkins
 Phone Logs
 Volunteer Checkins
 Transportation
 Meals
 Equipment

Generate Statistics

164

Now you can print or export that statistic report

Adams, Sadie Age: 99
 1826 Clark Ave,
 New Bern, NC 28540
 252-288-5479

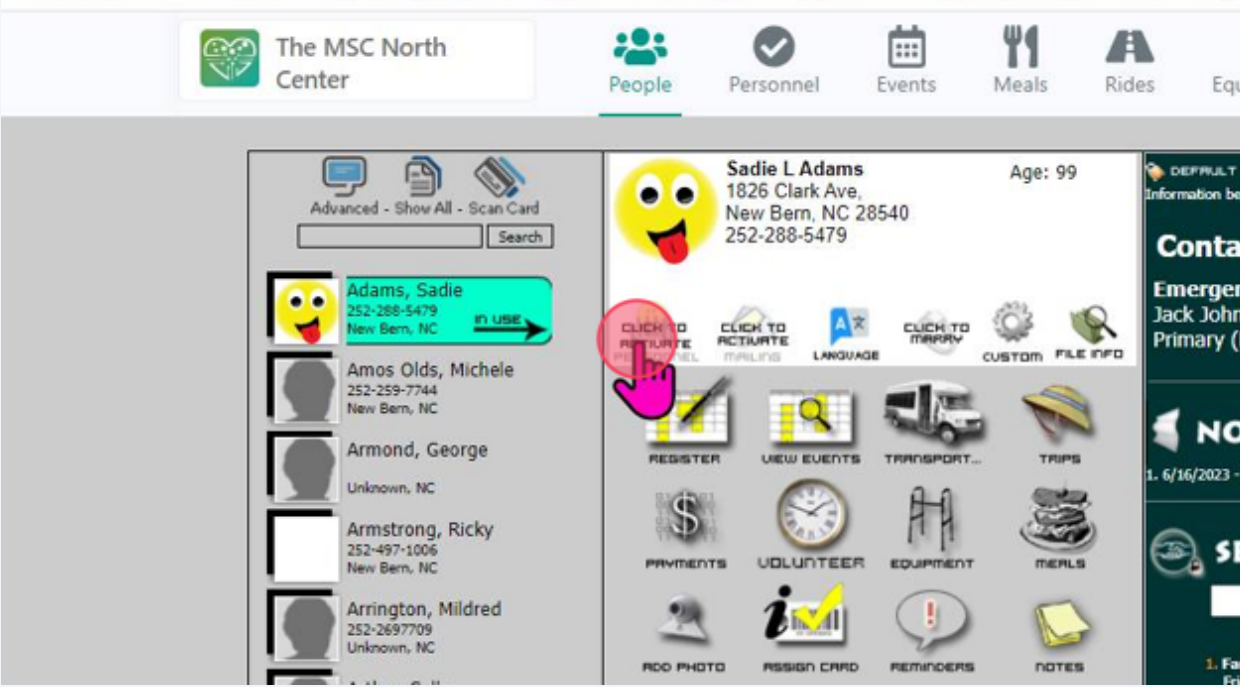
Activity from 01/01/2023 to 03/31/2023

Event Checkins 7

Date	Event	Hours	Cost
03/02/2023 09a	Health/Fitness Zumba	1	Free
03/07/2023 09a	Health/Fitness Zumba	1	Free
03/09/2023 09a	Health/Fitness Zumba	1	Free
03/16/2023 09a	Health/Fitness Zumba	1	Free
03/21/2023 01p	Classes/Workshops Art Class	1	Free
03/21/2023 09a	Health/Fitness Zumba	1	Free
03/21/2023 12p	Nutrition Lunch	1	Free
Total Hours		7	
Total Tickets			
Total Cost			\$0.00

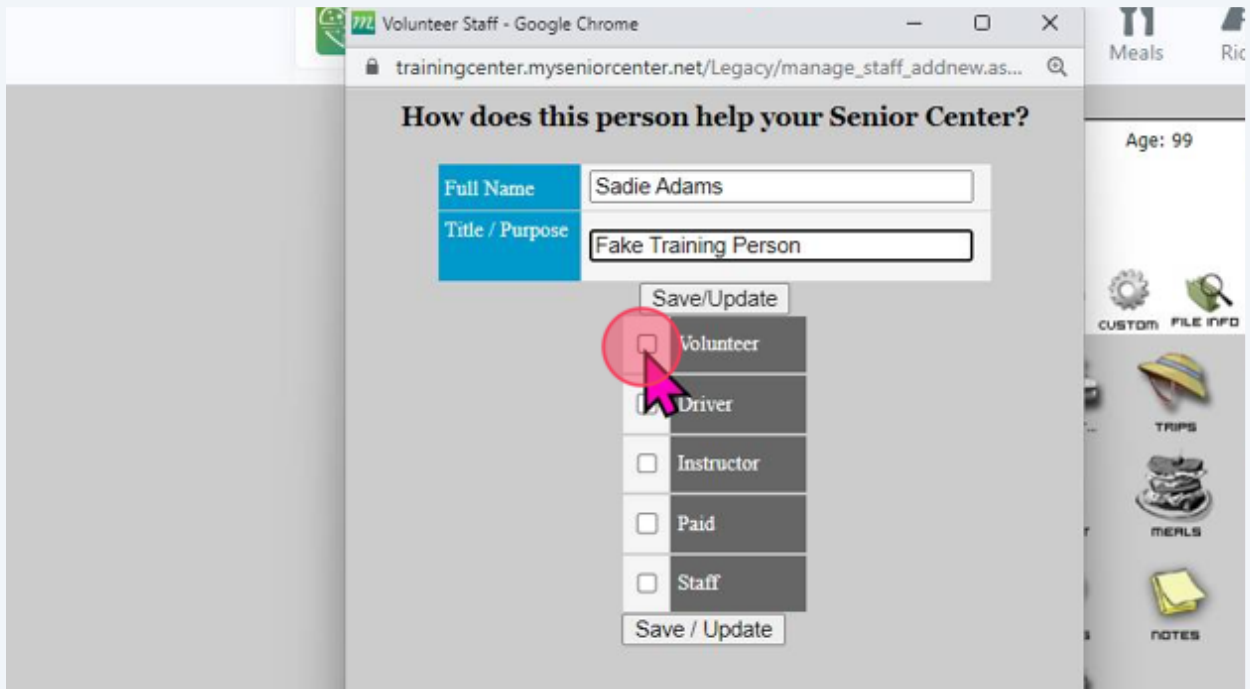
Volunteers, Drivers, Instructors, Paid and Staff

165 Click the "Click to Activate Personnel" icon just below the person's picture



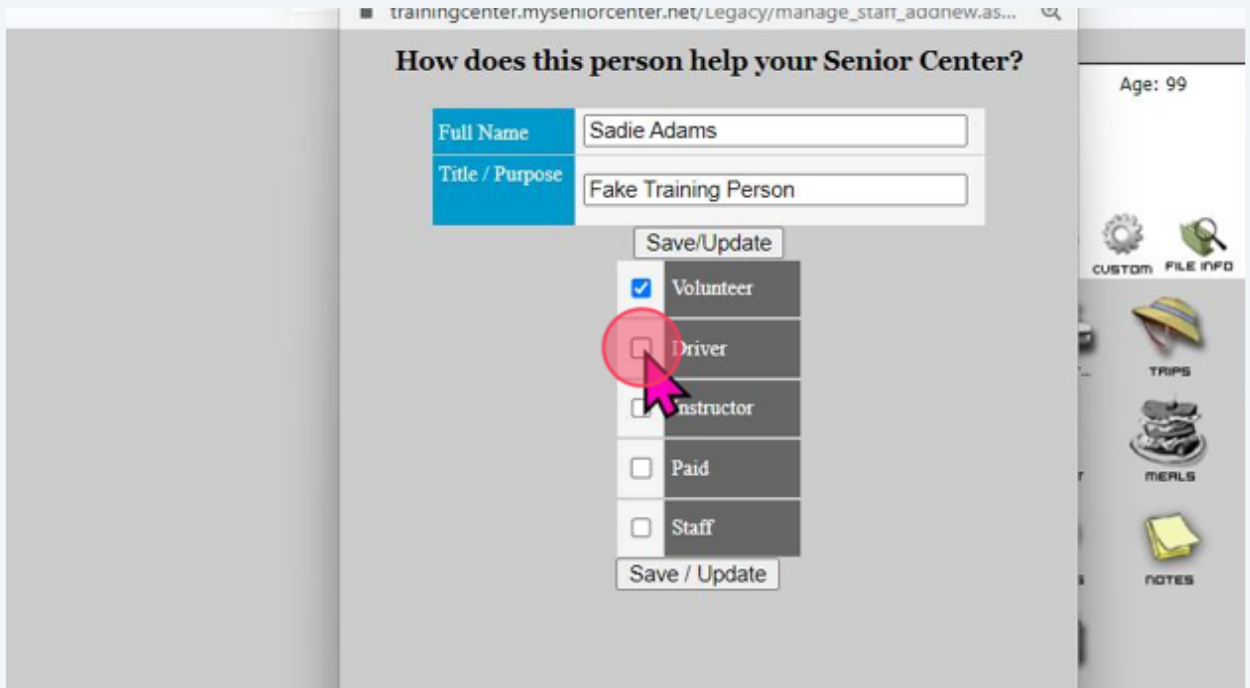
166

Here you can change the person's title/purpose and then you can indicate a few different things. Checking the volunteer box will add this person to your list of volunteers so that you can start entering in volunteer hours for the person.

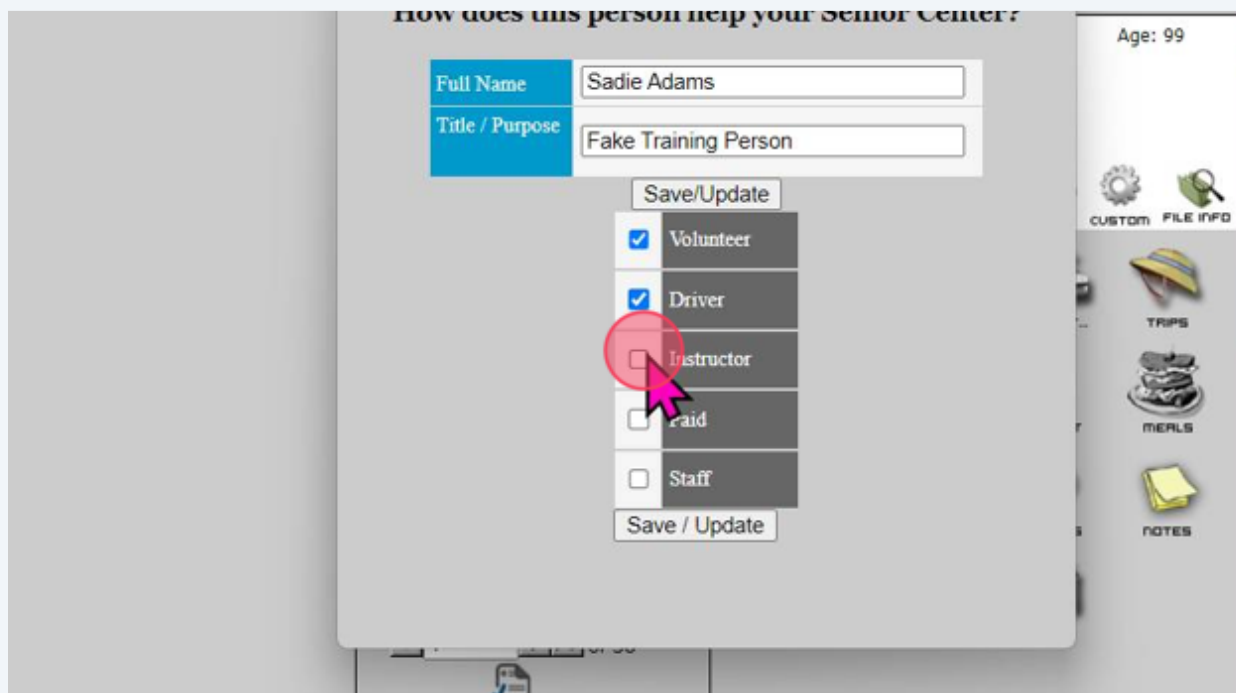


167

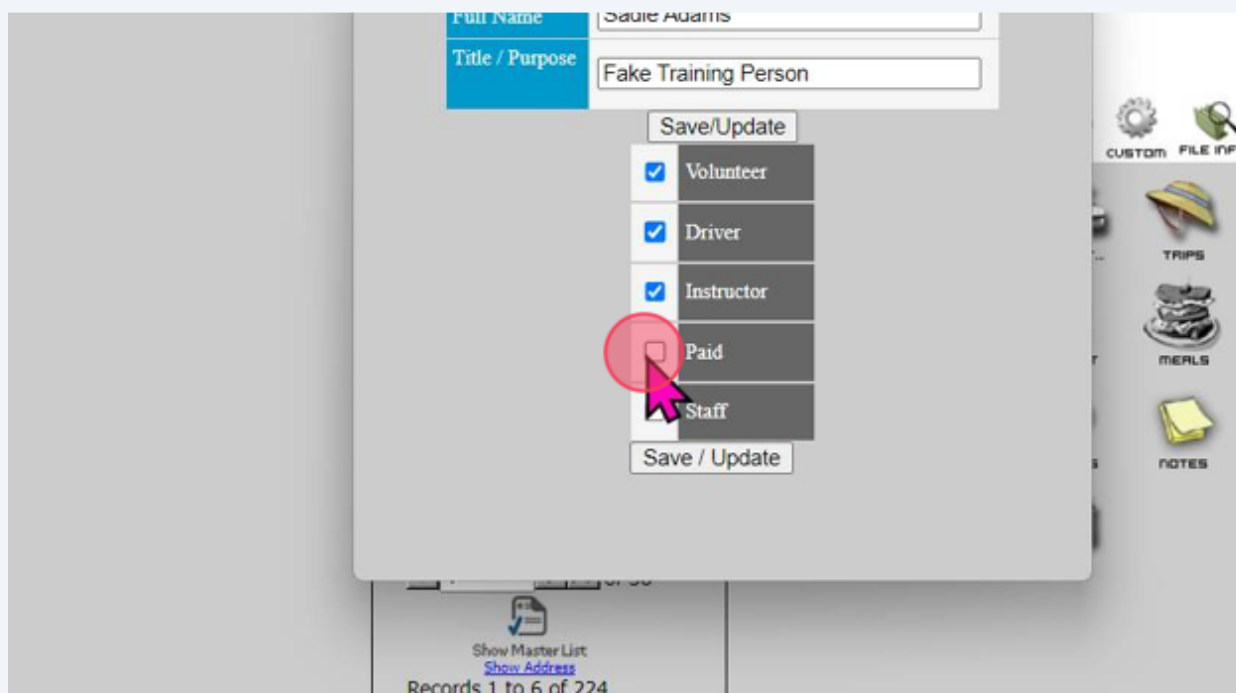
Checking the driver box will add this person to your list of drivers so if you schedule a ride for someone else you can choose this person as the driver.



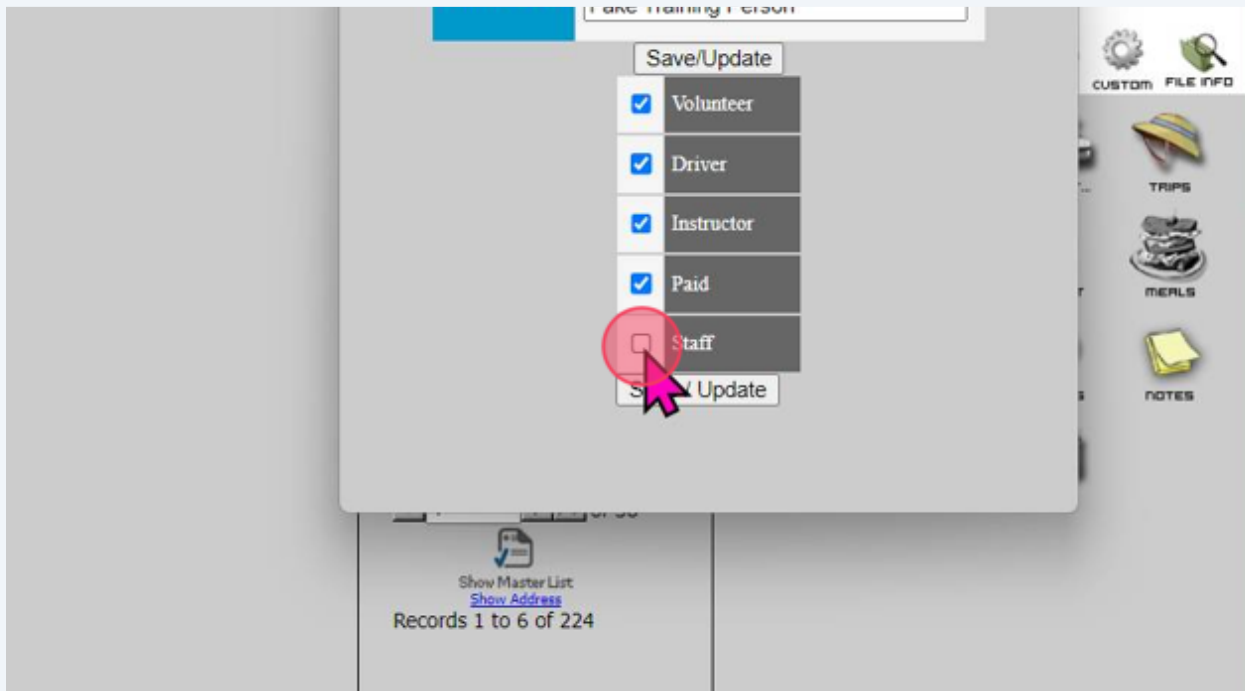
168 Checking the instructor Box will add this person to your list of instructors so if you're setting up a class you can choose this person as the instructor.



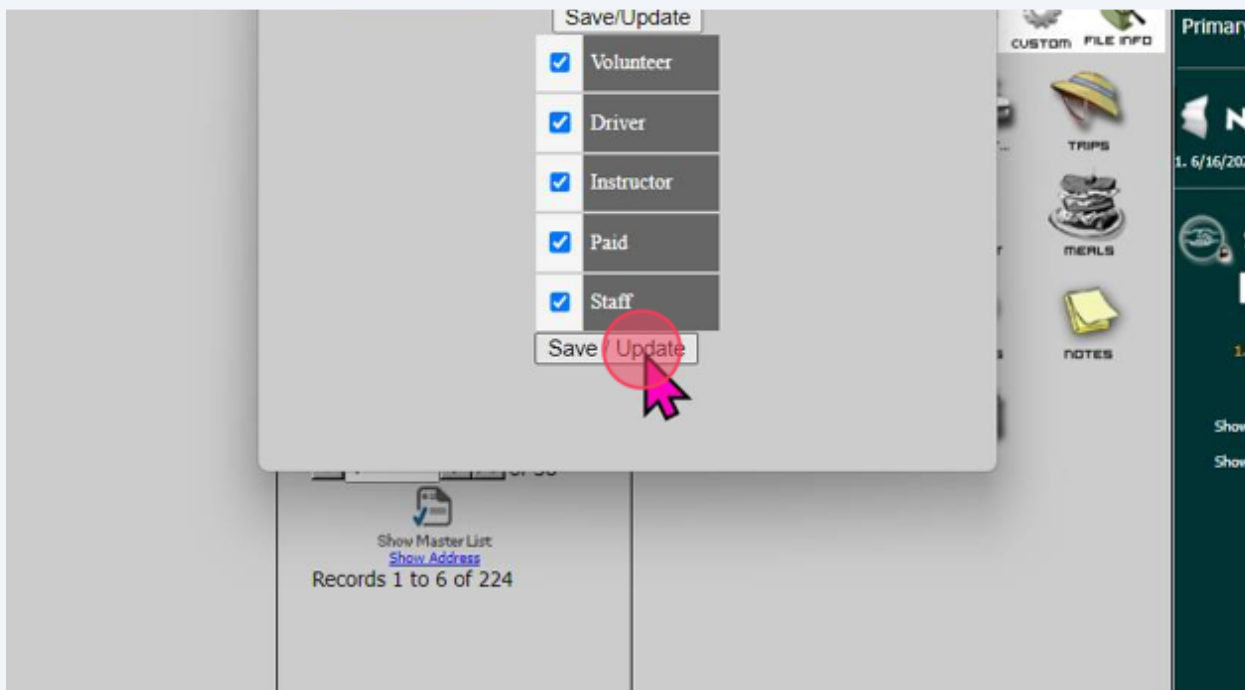
169 You can indicate that someone is paid.



170 You can also indicate if someone is a member of staff.



171 Click "Save / Update"



172

This person is still always going to have all of their information under the people tab. Now that you've made them a member of personnel they're also going to have their information under the personnel tab. Click the personnel tab.

inter.net/msc/seniors

Wix Wix tasks Training Progress |... MAC - Admin MAC ChrisCross My Training Site Getting Started

The MSC North Center

People Personnel Events Meals Rides Equipment

Advanced - Show All - Scan Card

Adams, Sadie
252-288-5479
New Bern, NC

Amos Olds, Michele
252-259-7744
New Bern, NC

Armond, George
Unknown, NC

Armstrong, Ricky
252-497-1006

Sadie L Adams
1826 Clark Ave.
New Bern, NC 28540
252-288-5479
Age: 99

PERSONNEL CLICK TO ACTIVATE MAILING LANGUAGE CLICK TO MODIFY CUSTOM FILE INFO

REGISTER VIEW EVENTS TRANSPORT... TRIPS

CONTACTS
Emergency - Jack Johnson
Primary (Home): 456-7

NOTES
1. 6/16/2023 - General Informa

SERVICES

173

Here you'll see a list of anybody that has any one of those checkboxes checked.

The MSC North Center

People Personnel Events Meals Rides Equipment

ADD PERSON ADD NEW PERSONNEL

ADD REMINDER VOLUNTEER REMINDER

CATEGORIES VOLUNTEER HOURS

Show All

checked	Full Name	Staff Title	Staff Best Phone	
<input checked="" type="checkbox"/>	Sadie Adams	Fake Training Person	252-288-5479	View
<input checked="" type="checkbox"/>	Ricky Armstrong	Standard Volunteer		View

Page 1 of 1
Records 1 to 2 of 2

174 Click "People"

ter.myseniorcenter.net/msc/staff

Seek&Deploy Wix Wix tasks Training Progress [...] MAC - Admin my MAC 772 ChrisCross 772 My Training Site Getting

The MSC North Center

Personnel Events Meals Rides Eq

ADD PERSON ADD NEW PERSONNEL ADD REMINDER VOLUNTEER REMINDER CATEGORIES VOLUNTEER HOUR

CORR	Staff Full Name	Staff Title	Staff Best P
No	Sadie Adams	Fake Training Person	252-288-54
No	Ricky Armstrong	Standard Volunteer	

Page 1 Records 1 to 2 of 2

175 Click the same person

Google Autoupdate Seek&Deploy Wix Wix tasks Training Progress [...] MAC - Admin my MAC 772 ChrisCross

The MSC North Center

People Personnel Event

Advanced - Show All - Scan Card

Person	Name	Phone	Location
	Adams, Sadie	252-288-5479	New Bern, NC
	Amos Olds, Michele	252-259-7744	New Bern, NC
	Armond, George	Unknown, NC	
	Armstrong, Ricky	252-497-1006	New Bern, NC
	Arrington, Mildred	252-2697709	

- Add Person
- Person List
- Import People
- Manage Dropdown Lists
- Manual Person Merge
- Email List
- Mailing Labels
- At Risk - Emergency Info

176 Click That person's volunteer clock.

Advanced - Show All - Scan Card
Search

Adams, Sadie
252-288-5479
New Bern, NC **IN USE**

Amos Olds, Michele
252-259-7744
New Bern, NC

Armond, George
Unknown, NC

Armstrong, Ricky
252-497-1006
New Bern, NC

Arrington, Mildred
252-2697709
Unknown, NC

Arthur, Sally
252-515-4500
Unknown, NC

1 of 38

Sadie L. Adams
1826 Clark Ave,
New Bern, NC 28540
252-288-5479
Age: 99

PERSONNEL
CLICK TO ACTIVATE TRAINING
LANGUAGE
CLICK TO MARRY
CUSTOM
FILE INFO

REGISTER
VIEW EVENTS
TRANSPORT...
TRIPS

PAYMENTS
VOLUNTEER
EQUIPMENT
MEALS

PHOTO
ASSIGN CARD
REMINDERS
NOTES

GROUPS
STATISTICS
LOGS

Contacts
Emergency -
Jack Johnson
Primary (Home): 456-741-7

NOTES
1. 6/16/2023 - General Information -

SERVICES

1. Family Support - Bill Henderson
Friday, June 16, 2023 - 10:15

Show More (100)
Show All

177 Click Add hours.

sCross My Training Site Getting Started Getting Started - S... DEMO SITE mytutorialcenter Work Email Barracuda

Events Meals Rides Equipment Reminders Statistics

Bill Henderson

Age: 99

1540

CLICK TO MARRY
CUSTOM
FILE INFO

TRANSPORT...
TRIPS

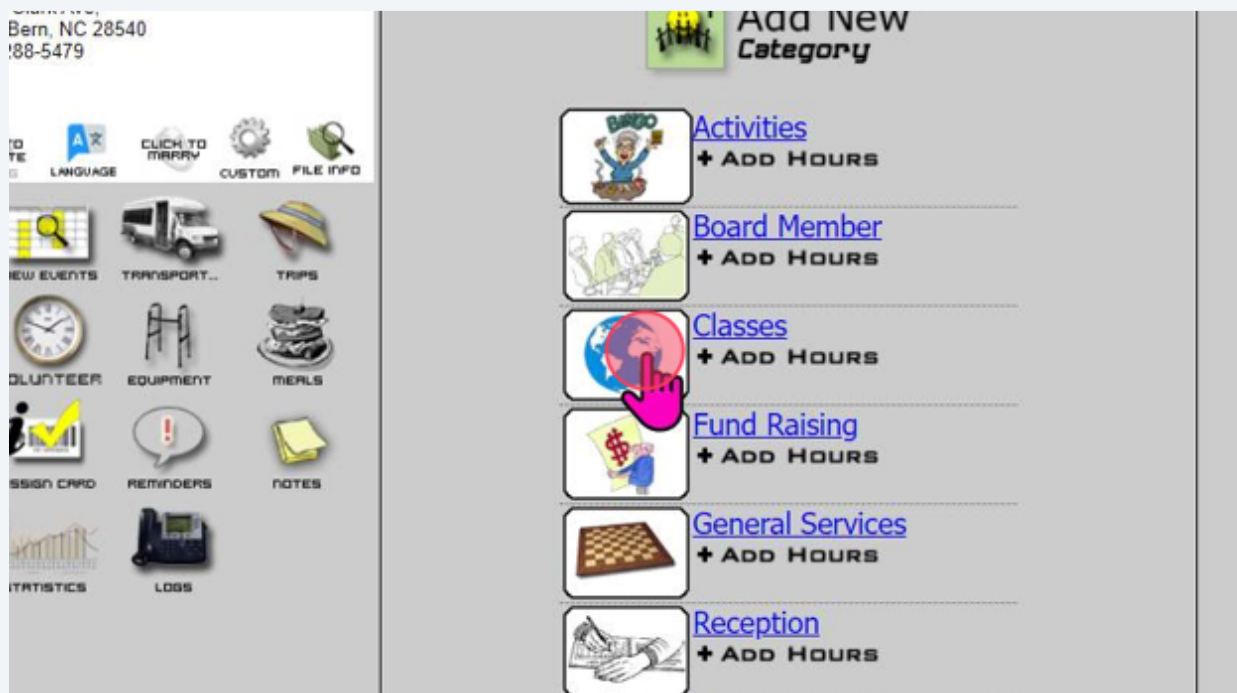
EQUIPMENT
MEALS

ADD HOURS
RECEPTION & RIDE STAFF HOURS

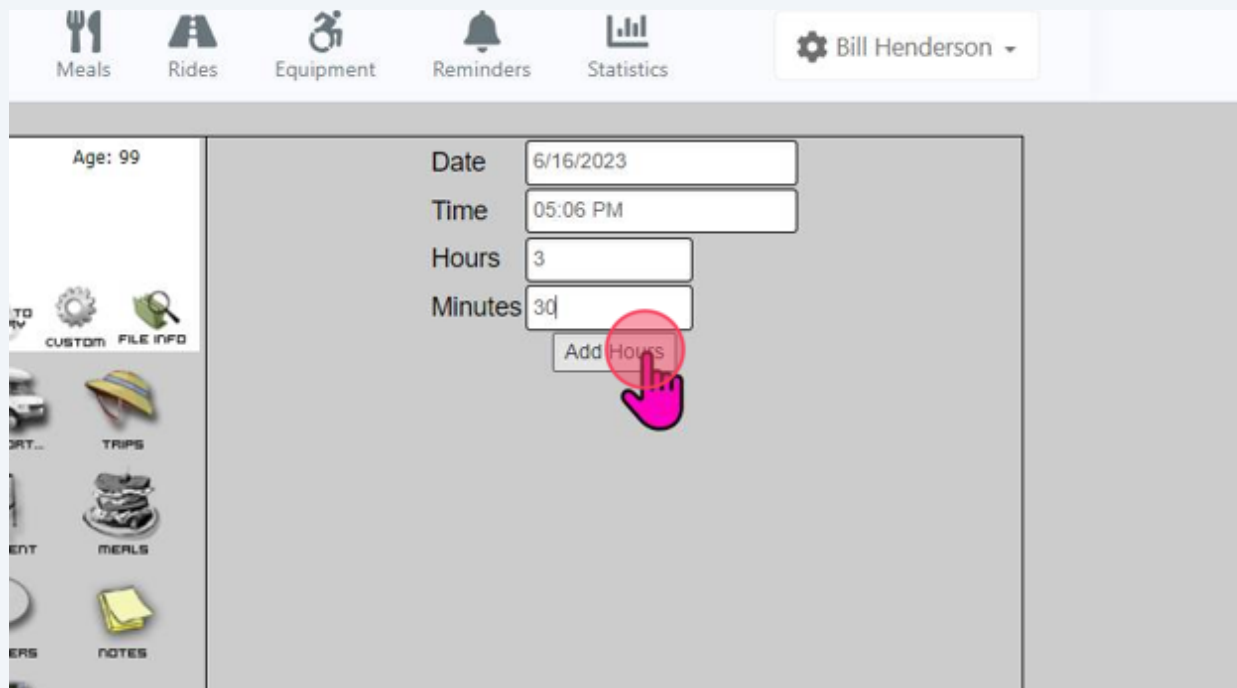
[Edit Category Access](#)

Date	Name	Time In	Edit	X
4/19/2023	Reception	0h 30m.	Edit	X
4/19/2023	Classes	3h 30m.	Edit	X
3/21/2023	Reception	0h 30m.	Edit	X
3/21/2023	Classes	3h 30m.	Edit	X

178 Select a category



179 The date and time will default to the current date and time but you can change those. You can put in past dates, future dates, and anytime you like. Then enter in hours and minutes and click add hours.



180

Now we can see those hours listed there. In training two you will learn how volunteers can enter their own hours at the touchscreen. Click the personnel tab.

181

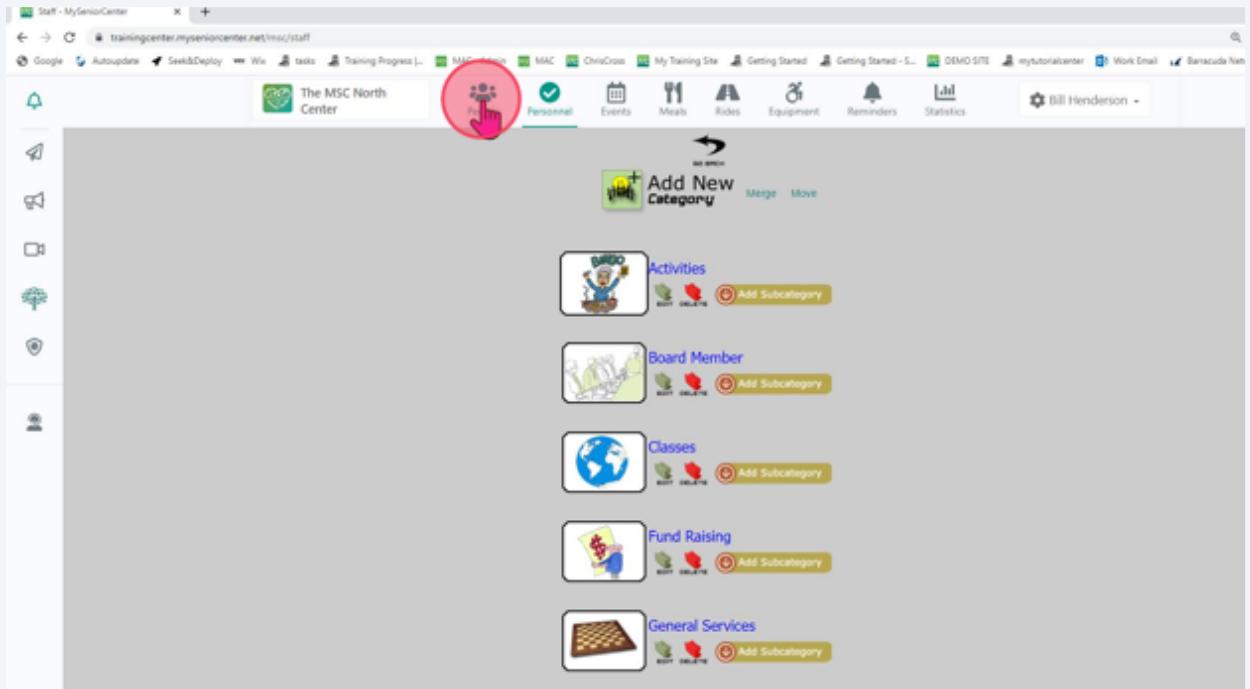
Click categories

CORR	Staff Full Name	Staff Title	Staff Best Phone			
No	Sadie Adams	Fake Training Person	252-288-5479	View	Edit	De-Activate
No	Ricky Armstrong	Standard Volunteer		View	Edit	De-Activate

Page 1 of 1
Records 1 to 2 of 2

182

Here you can customize that list of volunteer categories. You're able to add categories, edit categories, delete categories and you can add subcategories if you'd like to get more specific. Click back to the people tab.



183

You have completed MSC Training 01, People and their data. In MSC Training 02 you will learn all about keeping track of attendance.