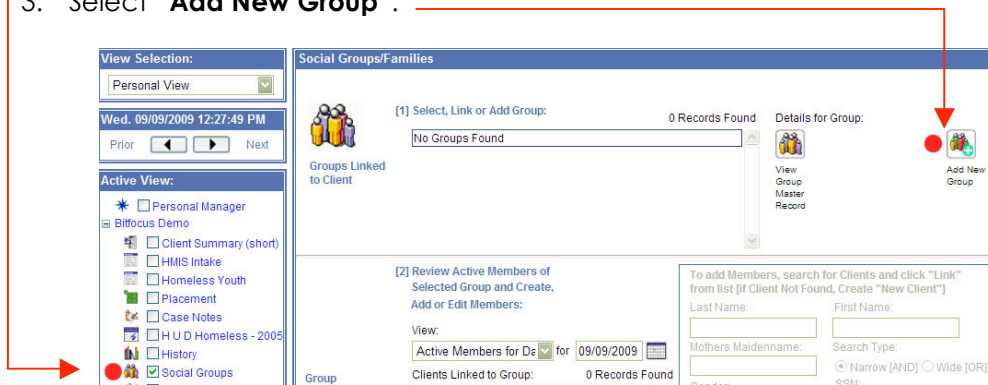


## Creating & Linking Family Groups

The **“Social Groups”** tool enables you to create family, social and other groups that can be linked, unlinked, added, or edited.

Note: Clients can be members of multiple groups.

1. Open the appropriate client record for the lead member (head of household).
2. Select **“Social Groups”** from the task menu.
3. Select **“Add New Group”**.



You must first search for an existing group.

4. Search for an existing group by **title**, **status**, and **type**.



5. If an existing group is not found, select **“Create New Group”**.

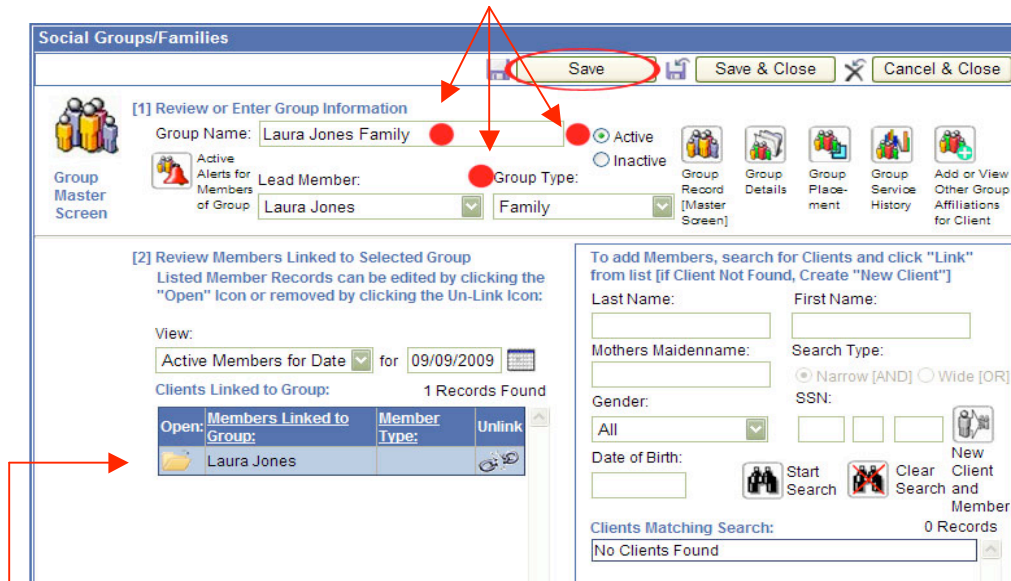
**Address:**

9101 W. Sahara Ave #105-158  
Las Vegas, NV 89117

**telephone:** (702) 614-6690  
**fax:** (702) 966-2478

**email:** info@bitfocus.com  
**web:** www.bitfocus.com

- Review or enter group information (name, status & type). Then click **Save**.



**Social Groups/Families**

[1] Review or Enter Group Information

Group Name:   Active  Inactive

Lead Member:  Group Type:

[2] Review Members Linked to Selected Group

Listed Member Records can be edited by clicking the "Open" icon or removed by clicking the Un-Link icon:

View:  for

Clients Linked to Group: 1 Records Found

| Open: | Members Linked to Group: | Member Type: | Unlink |
|-------|--------------------------|--------------|--------|
|       | Laura Jones              |              |        |

To add Members, search for Clients and click "Link" from list [if Client Not Found, Create "New Client"]

Last Name:  First Name:

Mothers Maidenname:  Search Type:

Gender:  SSN:

Date of Birth:

Start Search  Clear Search and Member

Clients Matching Search: 0 Records

No Clients Found

- After saving your group information, the current client will be listed as an active member. Open the member record for the current client to set the **Member Type** and **status**.



**Group Member Detail**

Save & Close  Cancel & Close

Type of Member:

Dates of Active Membership: Start Date:  End Date:

Status:  Yes  No

- Then click **Save & Close**.

- To add Members, search for Clients that may already be in the system.

- If the Client is found, click **"Link"**.

- If the Client is not found, click **"New Client"**.



To add Members, search for Clients and click "Link" from list [if Client Not Found, Create "New Client"]

Last Name:  First Name:

Mothers Maidenname:  Search Type:

Gender:  SSN:

Date of Birth:

Start Search  Clear Search and Member

Clients Matching Search: 1 Records

| Link | Open | Client Name | DOB        |
|------|------|-------------|------------|
|      |      | Jones, Bob  | 01/01/1960 |

New Client and Member

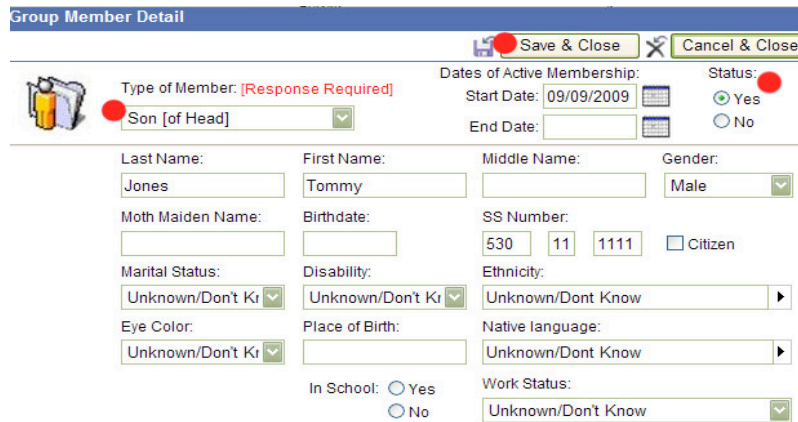
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12. Once you have linked an existing Client or added a new Client to the family group, repeat the previous steps to set the **Member type, status, and basic demographics**. Then click **Save & Close**.



When you have finished, the Family Group will be listed on the upper half of the Social Groups screen.



[1] Select, Link or Add Group:

1 Records Found

| Select                   | Groups Linked to Client: | Group Type: | Head of Group: | Status: |
|--------------------------|--------------------------|-------------|----------------|---------|
| <input type="checkbox"/> | Laura Jones Family       | Family      | Laura Jones    | Active  |

All linked Family Group Members will be listed on the lower half of the Social Groups screen.

Group Members:

[2] Review Active Members of Selected Group and Create, Add or Edit Members:

View: Active Members for Date: 09/09/2009

Clients Linked to Group: 3 Records Found

| Open:                    | Members Linked to Group: | Member Type:                         | Unlink |
|--------------------------|--------------------------|--------------------------------------|--------|
| <input type="checkbox"/> | Bob Jones                | Sibling [Brother or Sister of Heads] |        |
| <input type="checkbox"/> | Laura Jones              | Mother [Head of Household]           |        |
| <input type="checkbox"/> | Tommy Jones              | Son [of Head]                        |        |

To add Me from list [1]

Last Name:

Mothers M

Gender:

All

Date of Bir

Clients M:

No Client:

Note: If a Member leaves the household, they can be unlinked in this same area simply by selecting **"Unlink"** for that Member.

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