SoberTracker.com

Welcome to SoberTracker. SoberTracker is a tool created to help manage the day to day tasks when working or volunteering in the Recovery industry. This tool will allow you to track all aspects of working with clients. Following a client through the initial contact to whenever your organization decides that it isn't any longer necessary. Every aspect is covered from initial assessment to ongoing support and beyond. Track all services a client has received and all status notes. FollowUp scheduling is a big piece of what is need when you need to stay in contact.

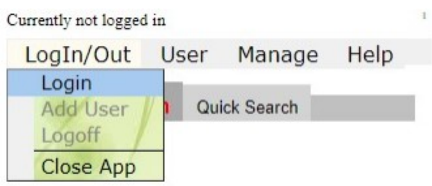
The software is internet based and can be ran on your phone, computer and pad device.

If you're one of those that are using sticky pad, notebooks or spreadsheets then this app if for you. It will streamline what you do. Reporting and follow up so much easier. No more missing critical calls. Also if your organization does funding this will allow you to track funding request, approvals and payments.

So put away the pad and pick up the keyboard. Go to www.SoberTracker.com

To gain access to the screens for approvals requires that a representative from the company is logged into the tracking system. The admin for the tools would have setup your company's database and at least one user. To login:

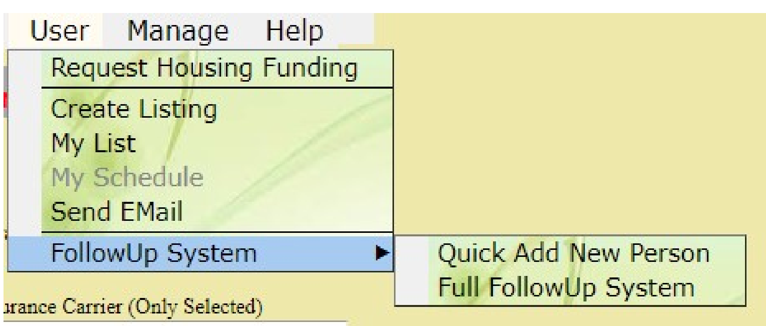
Go to the following webpage: www.sobertracker.org



When the screen comes up click on LogIn/Out and the menu will drop down.

Select **Login** and enter your user name and password:

After entering your user name and password click on Login. If you want to automatically login if you're at the same location then check the box 'Keep me logged in'. Additional menu items will now be available that weren't there prior to you logging in. Now you have access to SoberTracker screens.



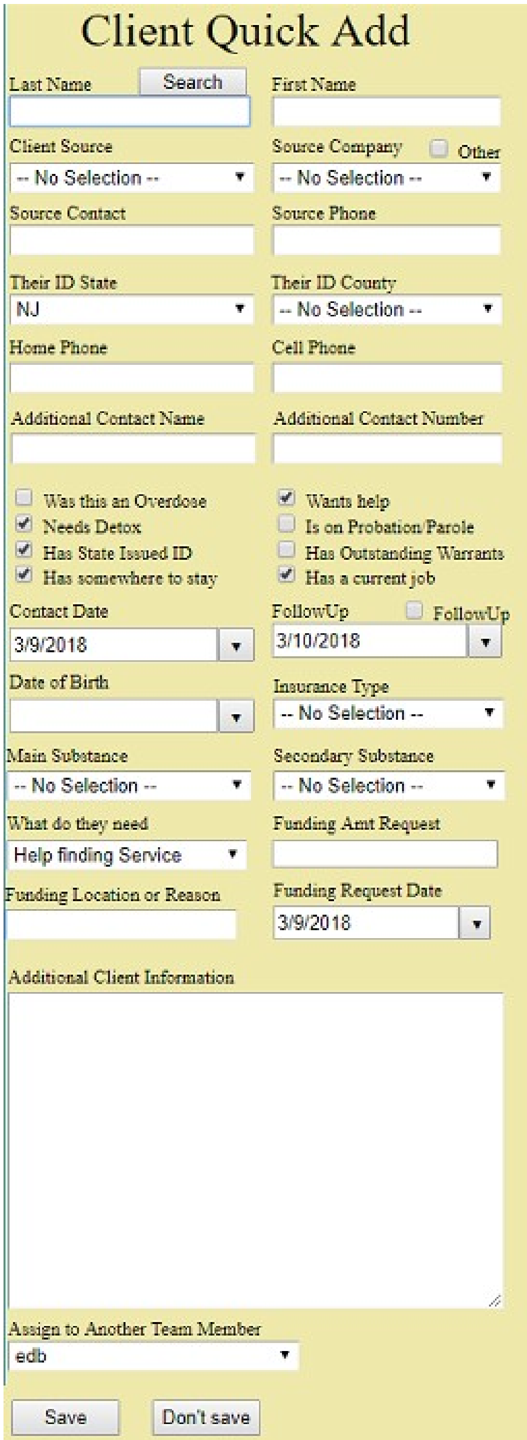
Select the **User** menu and **FollowUp System**

Quick Add New Person allows you to quickly add a person with the most important information. Great if you're on your cell phone, tablet or away from your office. ***Page 4***

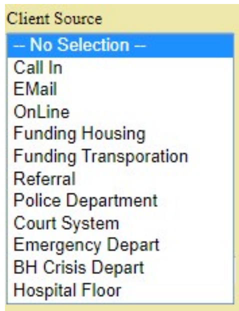
Full FollowUp System is the management system for keeping track of everyone you are helping. ***Page 5***

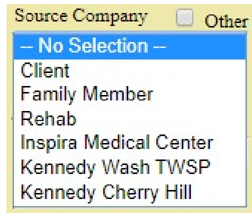
There are other menu options that we'll talk about further down in the manual.

Quick Add New Person



This is a one page entry form that can be used to quickly add a new people. There is a detailed entry form also that will be covered further below. This is great for tablet or cell phone entry.

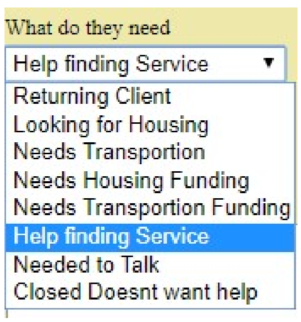




Client Source and **Source Company** come with default choices and you can add your own. Client Source is how they came to contacting you. Source Company is who referred them to you. If it was them then pick Client. If you want to enter a name that's not there then check the box that says Other.

Contact Date is the date that you first made contact with them. If they called you yesterday and you didn't get them into the computer until today then you would enter yesterday's date.

FollowUp is used if you want to be reminded that you need to follow up with this person on a certain date. If you pick a date make sure you check the box FollowUp.



Pick which general type of help they need. Once you pull them up later in the FollowUp system you can be more specific. If you met with someone that doesn't want help then pick Closed Doesn't want help. You can still set a follow up date if you want to be reminded later to contact them.

If this is for funding of sober living or transportation then pick the appropriate choice above and proposed funding information **Funding Amt Request, Funding Location or Reason** and **Funding Request Date**.

Additional Client Information is a place to enter any information that you have that will help anyone working with person understand and know what you know.

Assign to Another Team Member If you are a Team Lead and you are working with other people in your team then you could assign this person directly to someone.

This input form works great if you're at a location other than your office where you could use a computer, such as on your cell or notepad. The Add and Update Detail Client information screen is very detailed. If you do enter the information here you can always go into the detail later and update it.

Full FollowUp System (helpme helpme17)

The FollowUp screen is broken down into several sections.

Clients Next Last 1 of 9

	Full Name	Phone Numbers C,H	Assigned to	Current Staus	Status Date	Source	FollowUp Date	Is Shared
▶	Jamestown, Matthew	609-746-9447,	helpme	Needs Transportion Funding	3/9/2018 1:51:52 PM	Funding Transporation, Client		False
	Brooker, Pam	, 856-448-9755	helpme	Help finding Service	3/9/2018 1:47:18 PM	Call In, Client	3/13/2018 9:00:00 AM	False
	Parrish, Jeffery	609-447-6474,	helpme	Help finding Service	3/9/2018 1:42:57 PM	Call In, Client		False
	Leeds, Jennifer	973-878-9911,	helpme	Looking for Housing	3/9/2018 1:22:40 PM	Call In,		False
	Glassor, Erica	856-667-9134, 856-651-8791	helpme	Help finding Service	3/9/2018 1:17:51 PM	Call In, Client		False
	Downsen, Carl	609-773-9145,	helpme	Needed to Talk	3/9/2018 1:15:29 PM	EMail, Client		False
	Foster, Blanch	609-447-8841,	helpme	Help finding Service	3/9/2018 1:07:21 PM	Call In, Family Member		False

Clients Next Last 1 of 9

This is the top section that lists those that you have selected to review and update. When you first open the screen it selects everyone that has an open status (**Reset Search** in the menu under Search for Client will also reset the selection to all open status). Using the menus you can add or update clients, update the status of a client, set follow up dates for a client, reports and searching for clients.

This grid has features that will help you navigate. The top and bottom of the grid contains the following item:

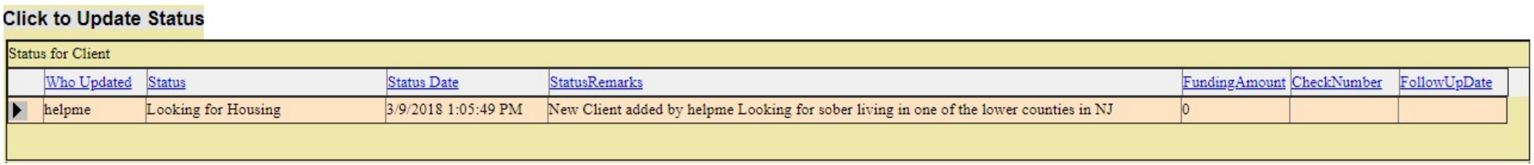
Clients Next Last 1 of 9 Clicking on **Next** will bring up the next page of clients in the gird. **Last** will take you to the last page. There are also **Prev** for the Previous page and **First** to go back to first page. The 1 of 9 represents the number of clients in your current search.

To select a client that is displayed on the screen just click anywhere on the line of the one you want. You'll know that you selected it because the color changed.

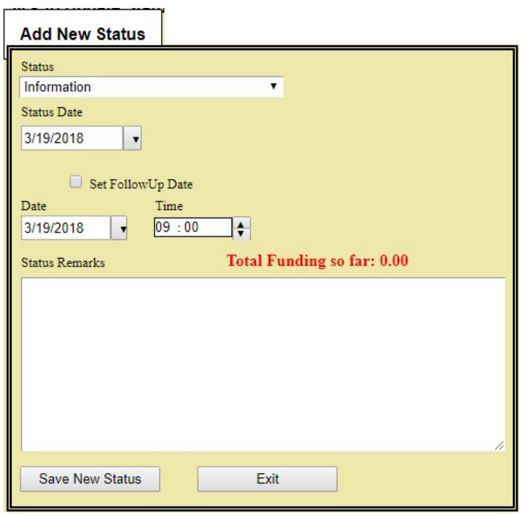
Assigned to column show who last updated the status on the client. **Current Status** column is the status of the client. There are many different statuses and will be covered later. **Status Date** is the last date and time when someone updates the status. **FollowUp Date** is the next time we have to contact or do something with this client. It's a reminder.

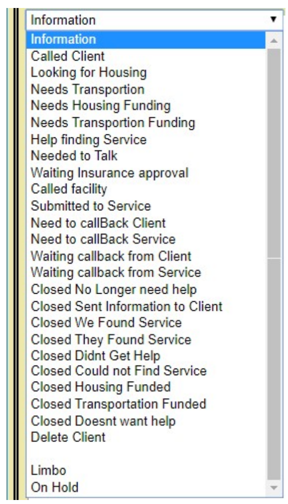
The grid can be sorted in any direction and by any column. Just click on the column header and a little up or down arrow will display showing you the order that you're sorting. The column headers are the blue letter such as Full Name

The second section contains the statuses of each client. Clicking on a client in the grid above will cause all of their statuses to display in this grid. To add a new status to a client you can either click on **Click to Update Status** or click on **Client – Add New status to Client** in the menu.



A status would be any type of event with this client. Such as a phone call, following up on services with an outside company, to mark them as we've finished helping them for now. There are many different statuses and your can add your own. When you Add New status the following window will open for you answer the questions:

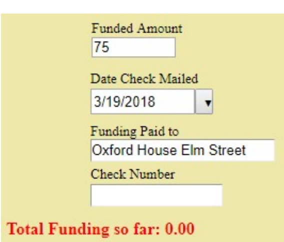




The statuses can vary on what is going on. To pick a new status you can click anywhere on the dropdown. All the statuses will change the main status of the event except **'Information'**. Many times we need to update the information that we've been working on without changing its status. Here is a list of them. You can customize the list by adding on more statuses.

The statuses that begin with 'Closed' means that you're done working on the original reason you're working with the client. If you want to follow up at any time in the future (even if it is closed) then check the box: Set a FollowUp Date and time to be reminded later.

The 'Status Date' is the date that this event took place. If you received a phone call last night and you want to update what the call was about then you would pick yesterday because that's when it happened. The system actually keeps track of when you actually posted it so there is an audit trail. As mentioned earlier if you want to be reminded later then check the box **'Set FollowUp Date'** and enter date and time. As an example let's say I needed to contact this person in 30 days to see how they are doing. I would set the follow up and on that day I would receive a email with everyone that needs to be contacted today and I also can pull it list of everyone in the using the menu item **'Search for a Client' Page ???** Then you would finish off by entering some notes or remarks. If a status of **Closed Housing Funded** or **Closed Transporation Funded** is selected then you will be asked the following additional questions:

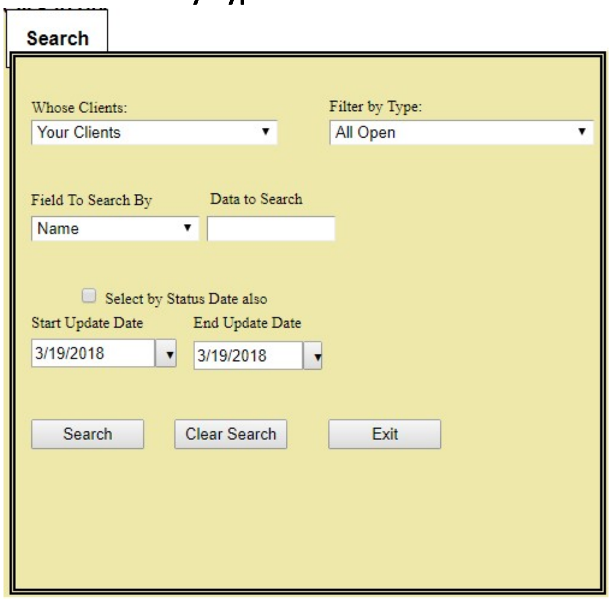


Funded amount is the amount that was funded. Date the check went out. Who the funding was paid to and the check number. Also **Total Funding so far:** is the amount that you've helped this client with funding.

SEARCH FOR A CLIENT

To search for a client go into the menu under **Client – Search for a Client – Search** and the following search window will open.

Searching allows you to filter through all of the clients in the system. This can done by selecting a group of clients by their statuses **Filter by Type** or an individual client in **Field to Search By**.

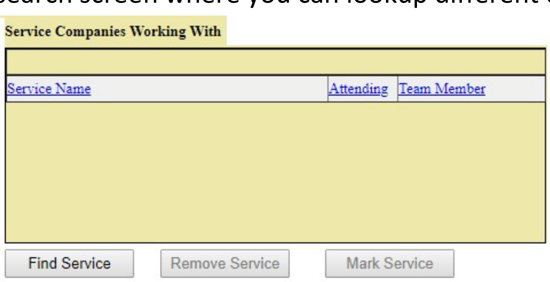


In **Filter by Type** you can pick by any statuses that you've assigned to a client or you can group them by **Open** and **Closed**. Click on **Filter by Type**, select which one you want and then click the **Search** button.

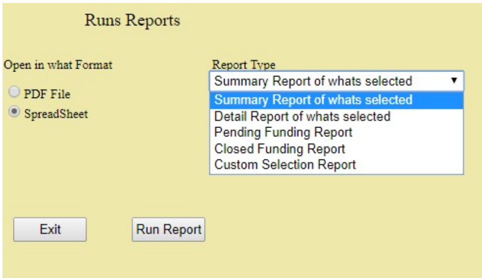
You can search for an individual client by any part of their name, phone numbers, address. As an example: If I was to enter Smith and name was what I was searching for then the search would return anyone that matched the **Filter by Type** and Smith. If you don't know what the Filter by type would be then pick **All Open and Closed**.

Once you're done searching you can click the **Exit** button and it will close the search window. You can reset your search parameters at any time by clicking **Clear Search** button or in the menu under **Search for Client – Reset Search**.

You can keep track of all the places you have a call out to by using this feature. Clicking on **Find Service** will take you into a search screen where you can lookup different companies and select one.



Reports. There are a few reports built into the system. Once you make your selection and click **Run Report** the report will show up down at the bottom of the internet browser you're using.



Summary and Detail report are based on what you have selected on the Follow Up screen. You can go back to that screen and filter on different types and come back here to print your selection. Detail means that the remarks will also be reported.

Pending Funding Report is a report of all clients that requested funding that haven't going out. **Closed Funding Report** is everyone that's been sent funding