Client Summary

This page provides you with a detailed overview of information entered on a given case. Instead of navigating to each page individually, this page will show most information needed.

The pie charts show what percentage of data has been entered, providing directors with a visual aid of completeness. Hovering over these pie charts will show you an at-a-glance preview of information entered in that section. This way, you have quick access to information you need.

Client forms can be found in the dropdown at the bottom of this page. Click the printer icon to pull a print preview of that form and print. Other documents will take you to the Printed Materials page.

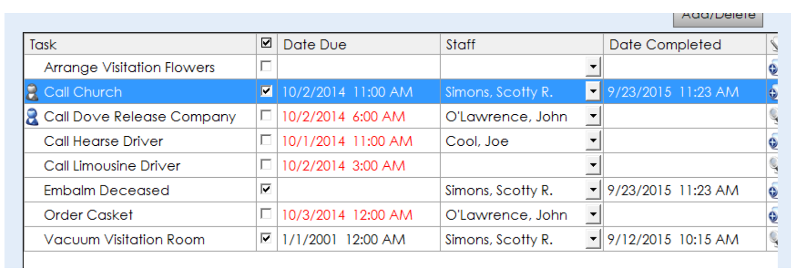
- If you have purchased V-Files, there will be a button on this page to view your Virtual Files.
- If you have purchased the Obituary Generator, there will be a quick access button to navigate to that section.

<u>Tasks</u>

This tab is only available if you have purchased E-View. This allows you to view and complete any tasks assigned for this client. These can be setup so they automatically are entered based off of the client type, whether they're a veteran, or other variables. If you have purchased E-View, watch our E-View video tutorial to set up your task pool and triggers.

This box displays 7 different columns for the task:

- Task name: title of task; what's to be completed
- Complete: checkbox when completed; will date and time stamp completion; also pulls any reports or documents attached to this task when checked
- Date Due: due date assigned to this task; set up in E-View setup
- Staff: the staff member assigned to this task; may be changed from the dropdown
- Date Completed: will automatically be date and time stamped when completed box is checked
- Notes: click + to add any notes regarding this task
- Reports/Documents: any reports or documents that are attached to this task



Task	☑	Date Due	Staff	Date Completed
Arrange Visitation Flowers	☐			
Call Church	☑	10/2/2014 11:00 AM	Simons, Scotty R.	9/23/2015 11:23 AM
Call Dove Release Company	☐	10/2/2014 6:00 AM	O'Lawrence, John	
Call Hearse Driver	☐	10/1/2014 11:00 AM	Cool, Joe	
Call Limousine Driver	☐	10/2/2014 3:00 AM		
Embalm Deceased	☑		Simons, Scotty R.	9/23/2015 11:23 AM
Order Casket	☐	10/3/2014 12:00 AM	O'Lawrence, John	
Vacuum Visitation Room	☑	1/1/2001 12:00 AM	Simons, Scotty R.	9/12/2015 10:15 AM

<u>Death Certificate Tracking</u>

This is an additional feature for purchase. Death Certificate Tracking Allows the user in Procession to enter when the DC has been sent to the physician, the register, and the family. This also gives you the ability to print reports on the status of each DC for any client in SRS.