POLIXEN

Clients

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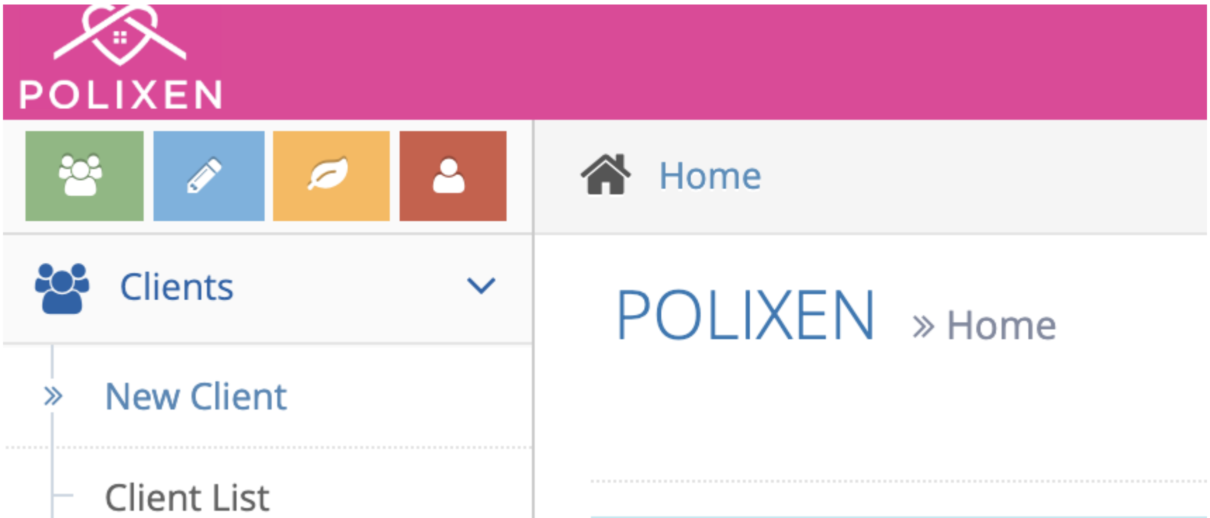
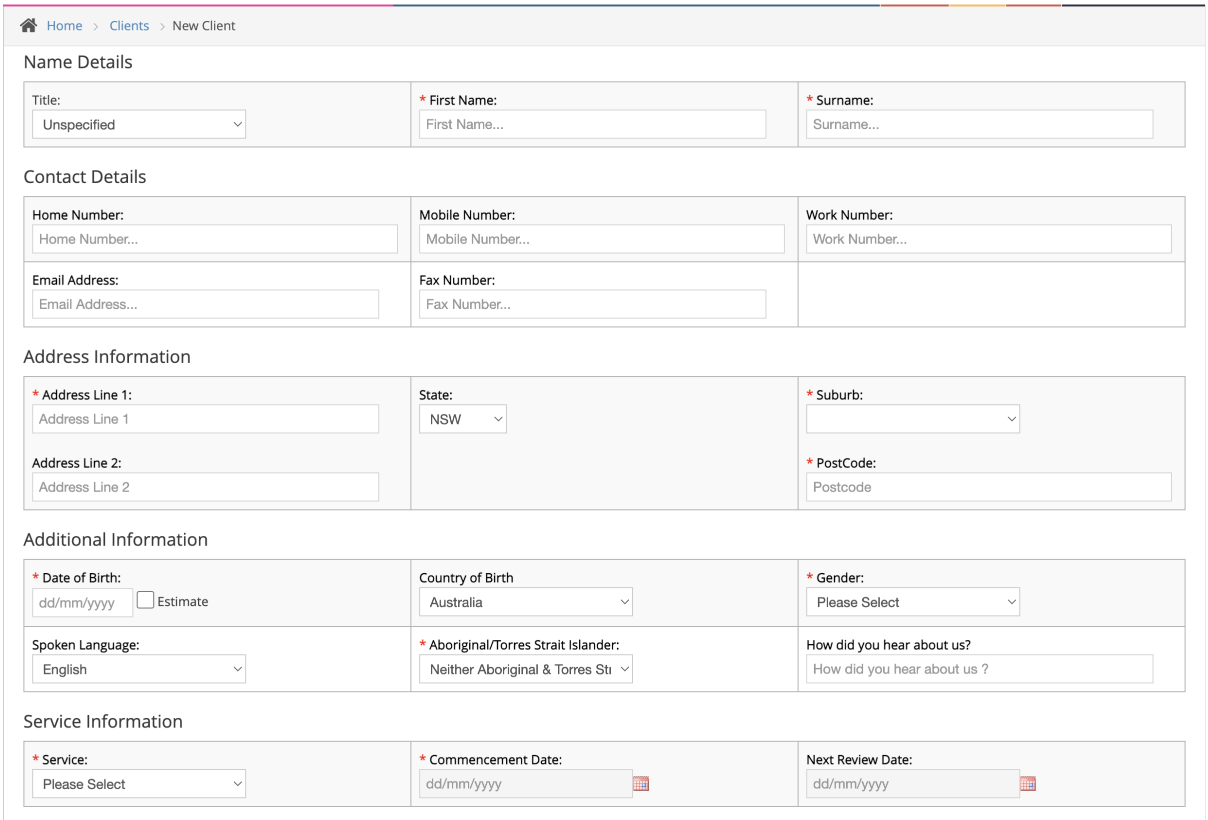
Add New Client

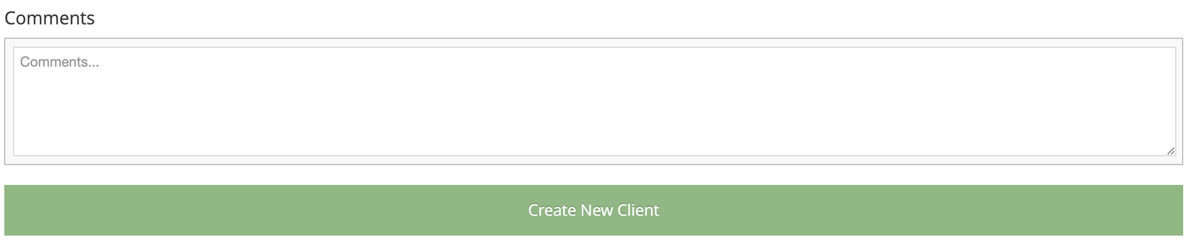
To add a new client to Polixen, click on “Clients” in the main side menu, then select “New Client”.



This will take you to the Create New Client page. On this page, you can enter details about your new client – the required fields are marked with a * as in the picture below.



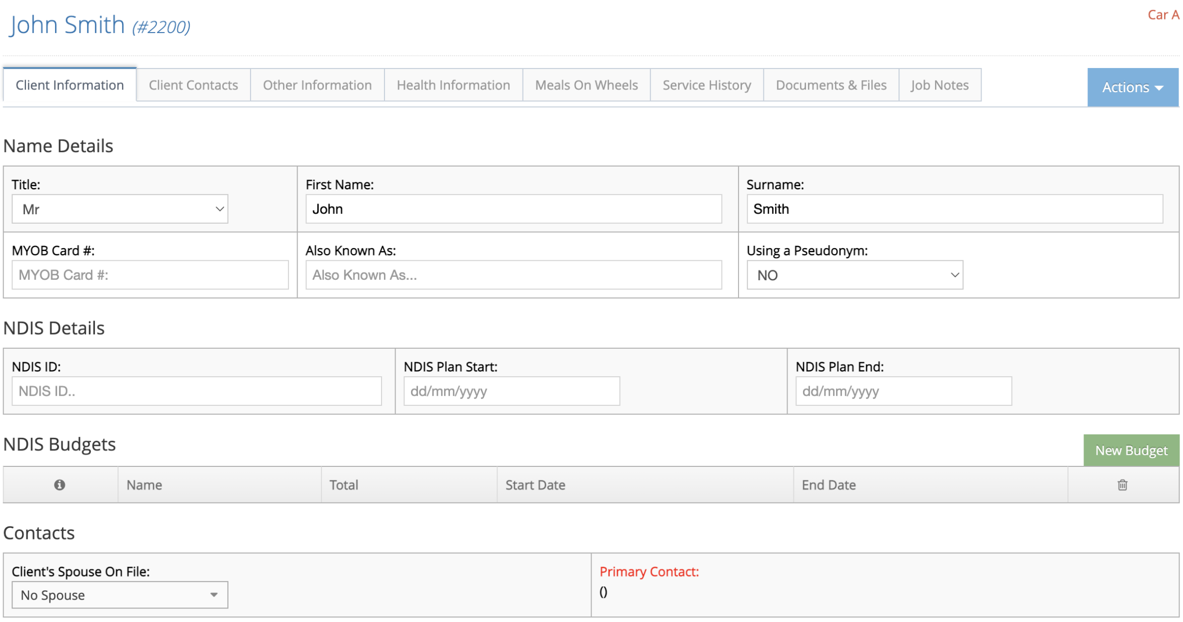
Once you've entered these details, you can click the “Create New Client button.”



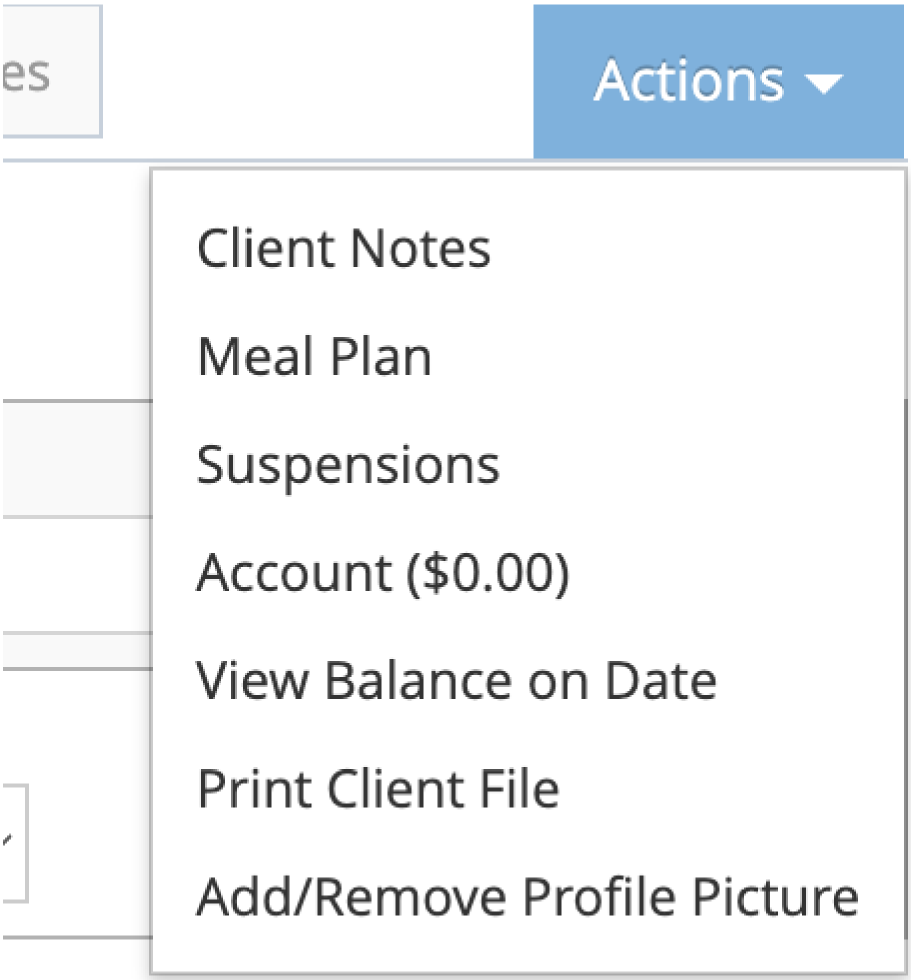
This button will create the client, and then take you to that client's Client Page where you can enter extra data.

View and update clients

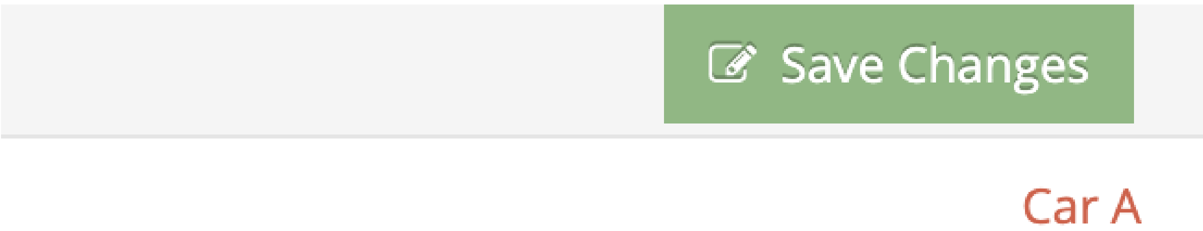
To navigate through the client's details and update them, use the Tabs across the top on the Client Page - Client Information, Client Contacts, etc.



You can click the Actions button on the top right-hand side to navigate to other pages about the client, such as their Account History, Meal Plan and Notes.

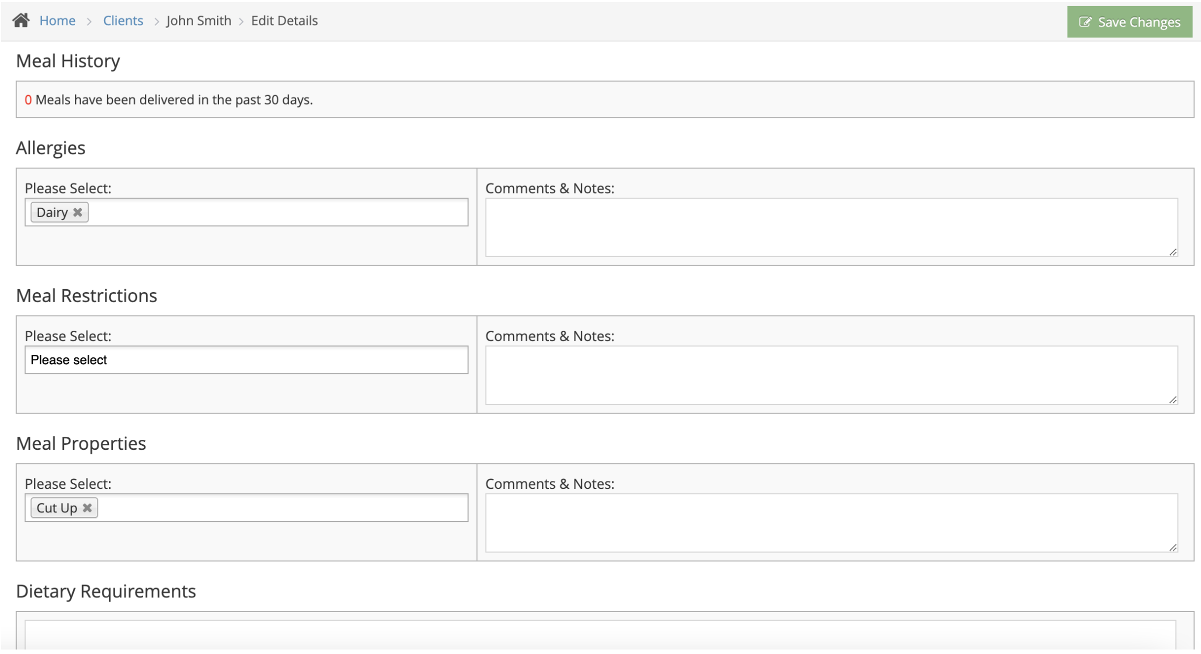


To update the client information once changes have been made to their details, click the Save Changes button at either the top or bottom of the screen. If there are errors on the Client Page (eg: invalid birthdate), you will be warned at this point.

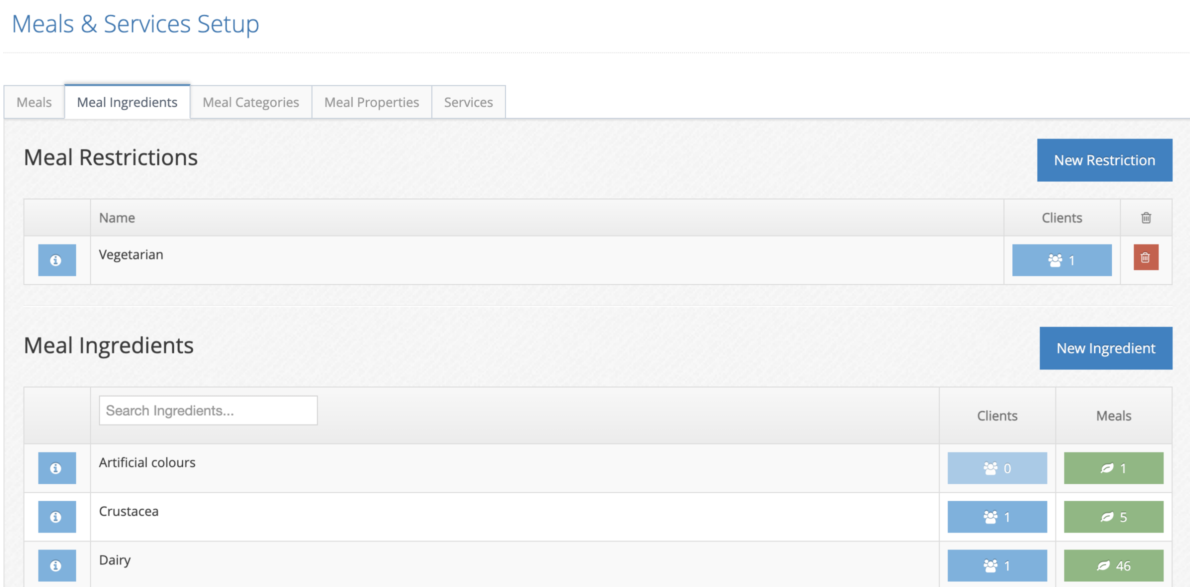


Dietary Requirements

To update the dietary requirements of a client, navigate to the Meals On Wheels Details tab on the Client Page. On this page, you will be able to apply Allergies, Restrictions and Properties to the client, as well as enter Dietary Requirements in a free-form text box.



The Ingredients (that will be linked to the Allergies), Restrictions and Properties can be set up under Administration > Meals & Services Setup. Once you've done that, you can apply them to a client.



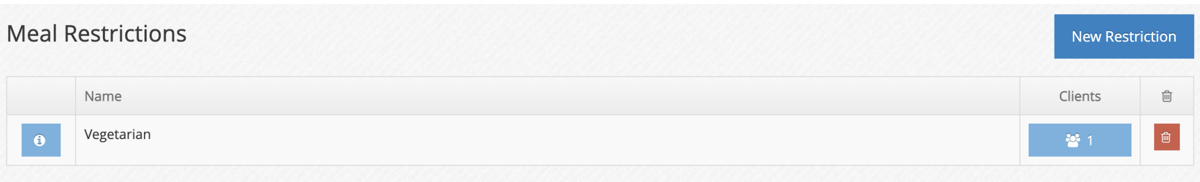
An Allergy will be added as an ingredient. These ingredients can be assigned to a client and a meal. For example, a client has an Egg allergy. If the Egg ingredient is added to all meals that contain Eggs, Polixen will know that this client is Allergic to those meals.


Meal Ingredients

New Ingredient

	Search Ingredients...	Clients	Meals
	Artificial colours	0	1
	Crustacea	1	5
	Dairy	1	46
	Egg	1	14
	Fish/Seafood	1	9
	Garlic	0	32
	Gluten	0	32
	Nuts or traces of Nuts	0	5
	Preservative 200	0	4

A Restriction is a group of ingredients. These groups can make it easier to assign multiple allergies to a client. For example: this client has a Vegetarian restriction. The Vegetarian restriction probably includes ingredients such as Beef, Lamb, Pork, etc. This means this client is now Allergic to all meals containing any ingredient in this group.

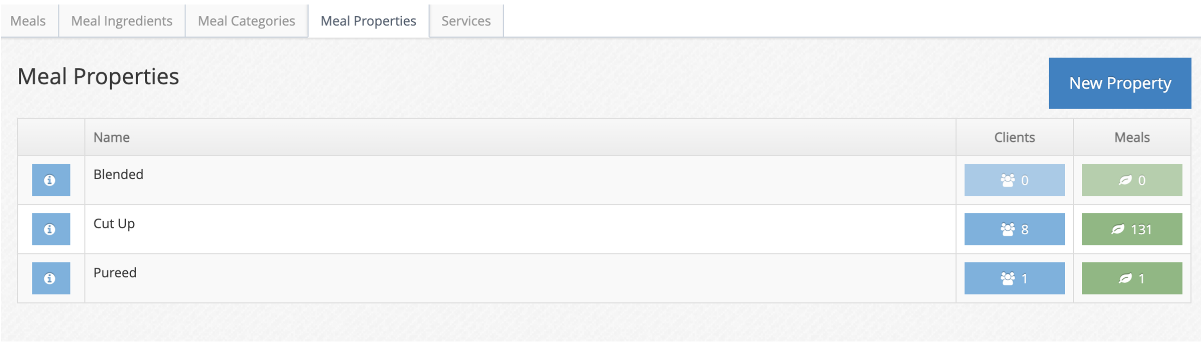

Meal Restrictions

New Restriction

	Name	Clients	
	Vegetarian	1	

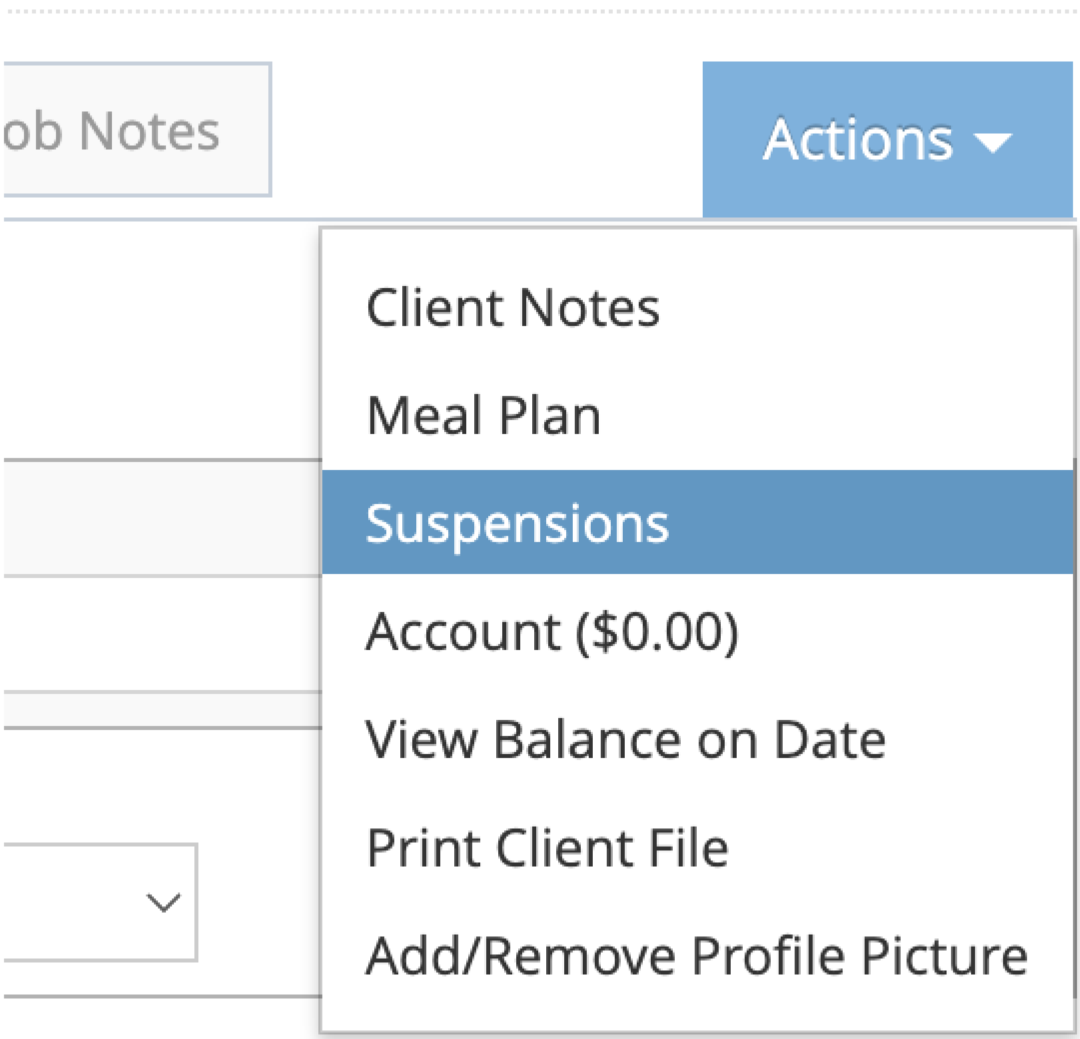
A Property is typically a meal preparation choice. For example, Minced, Pureed, etc. When a Property is assigned to a meal, and a client adds that meal to their Meal Plan, they can choose to select one of the Properties assigned to the meal. That is, they can choose how the meal is prepared. If a Property is assigned to a client, Polixen will treat that Property as a default selection. That means if a meal with that Property is added to a client's Meal Plan, you don't need to manually select the

Property for it to be chosen. This can make it easier for clients who will always want meals prepared a certain way.

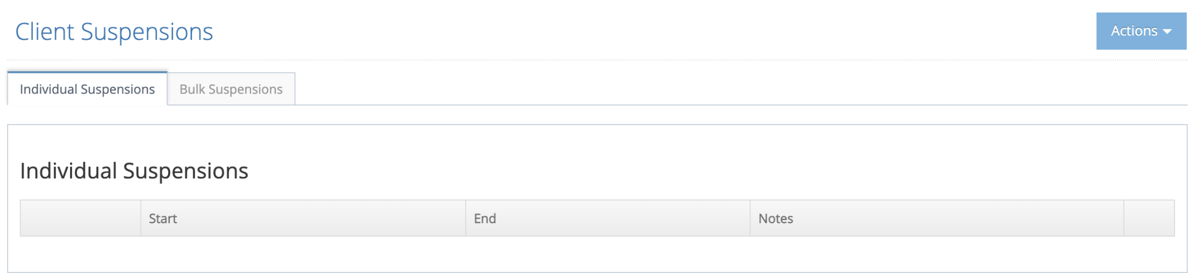


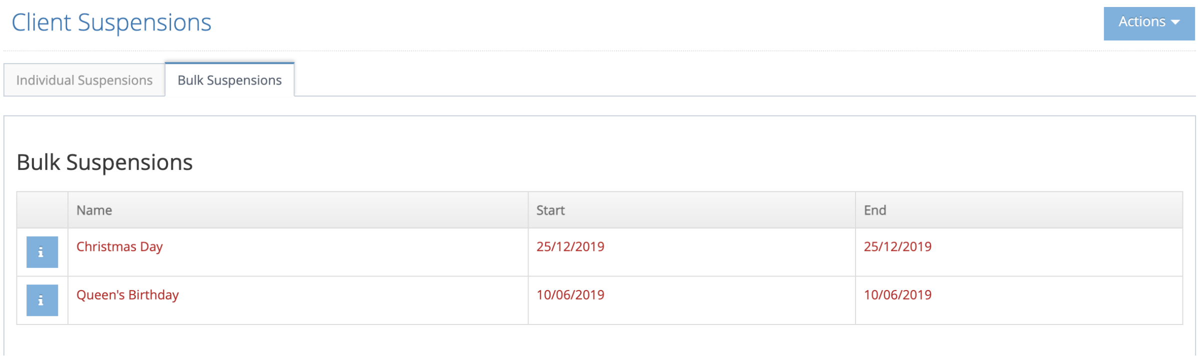
Client Suspensions

You can suspend a client if you don’t want them to receive meals and jobs for some time. To add a client suspension, go to the client’s suspension page. You can do that either by selecting the “Actions” button > “Suspensions” or by scrolling down to the Service Information section on the Client Information tab and clicking on “Client Suspensions”.



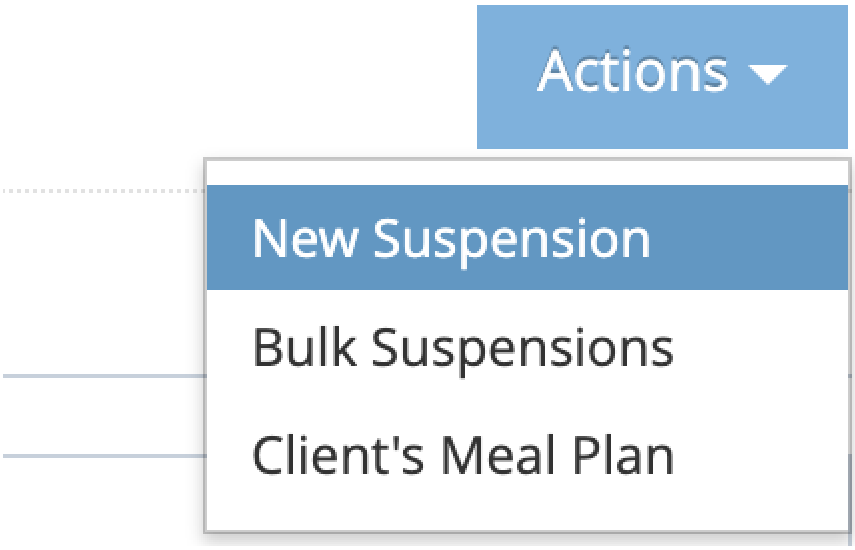
On the suspensions page, both Individual and Bulk suspensions are listed. Individual Suspensions only apply to one client, whereas Bulk Suspensions apply to all clients or a client group.





Individual Suspensions

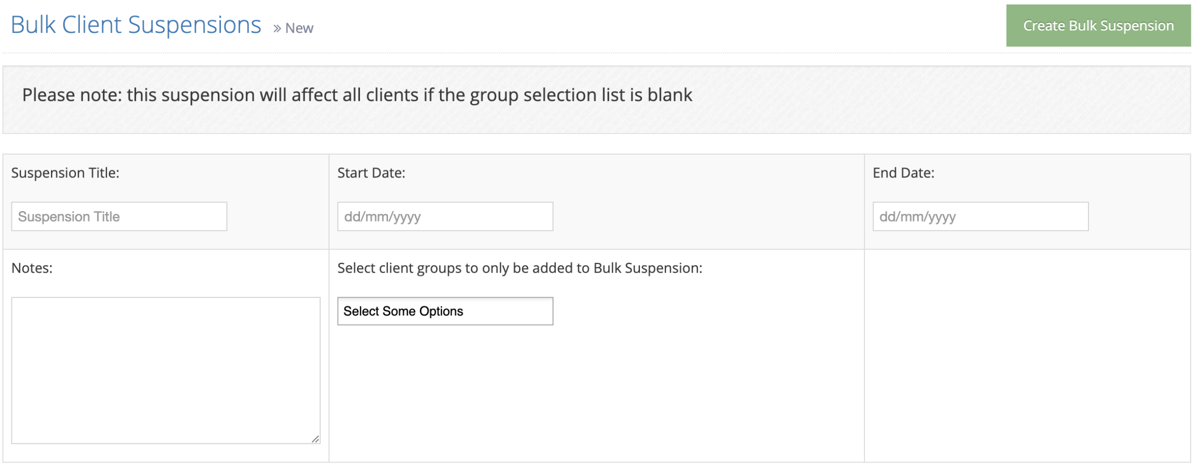
You can use the Tabs across the top to navigate between both lists, and the Actions button to create a new Individual Suspension.



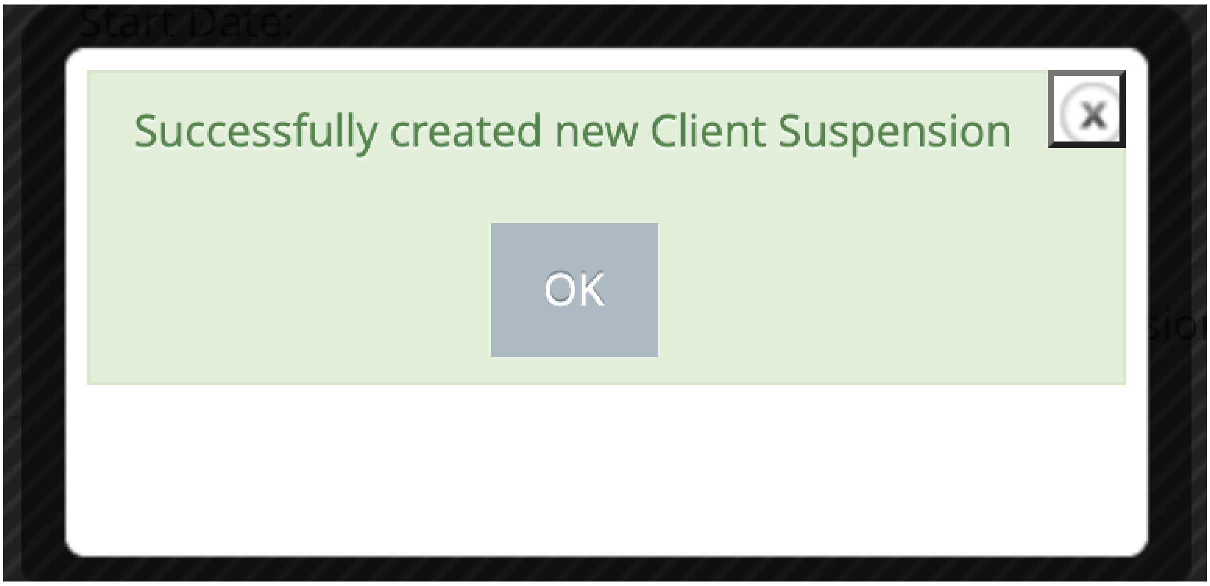
Bulk Suspensions

You can also choose to navigate to the Bulk Suspensions page. To create a new bulk suspension, click on the “New Suspension” button on the top right side.

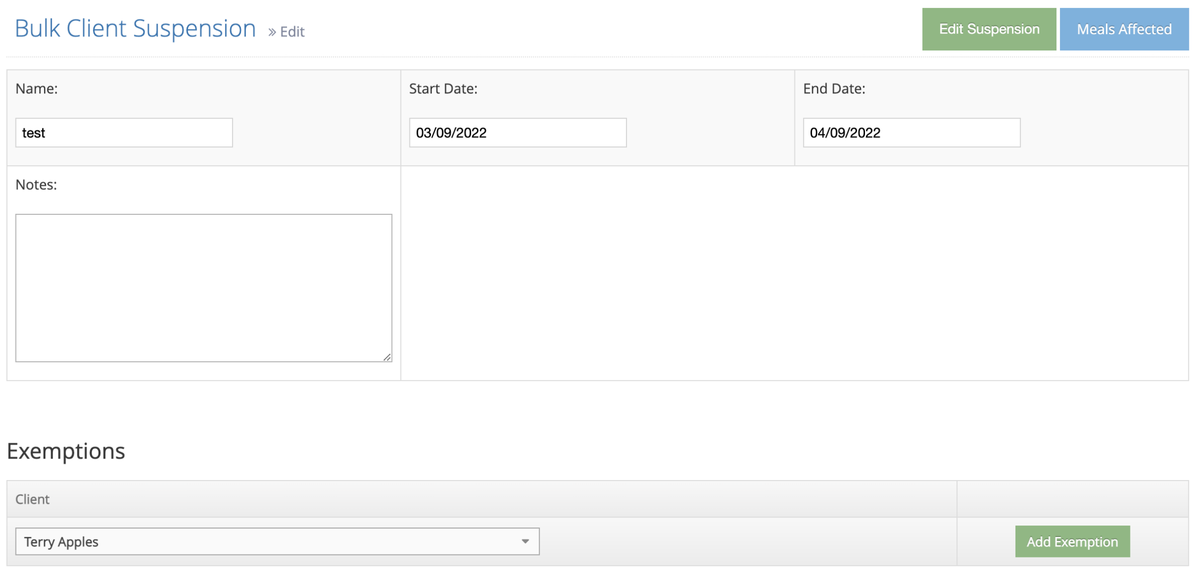
That will open a new page where you can add the Suspension Title, Start Date, End Date and notes. You can also select a specific group of clients to be added to the suspensions.



Click on “Create Bulk Suspension” to save it.



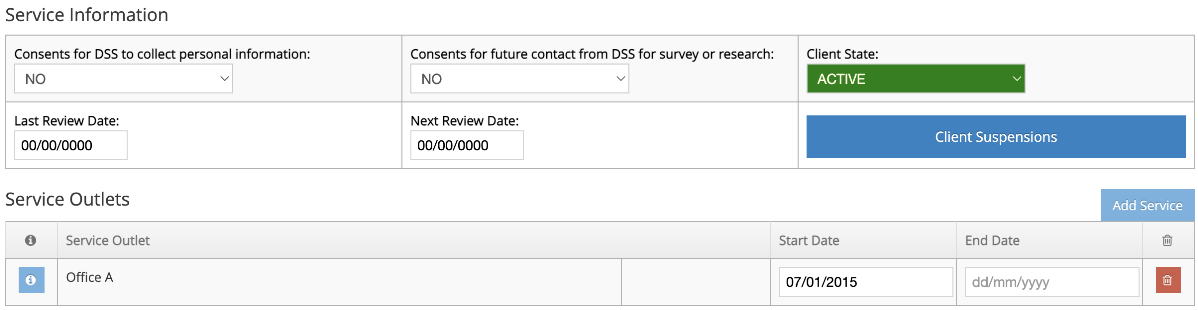
You’ll then be redirected to the Bulk Client Suspension page. On this page, you can make changes to the suspension and also add clients to be exempt from it. Select “Edit Suspension” to save changes.



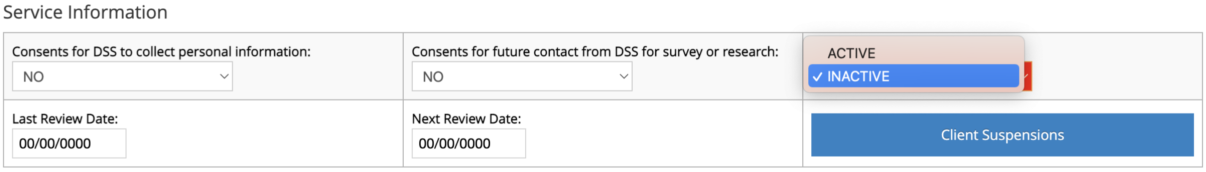
It’s possible to check what Meals will be affected by the suspension if you click on the “Meals Affected” button on the top right side.

Deactivate a Client

If you need to deactivate a client, go to the Client Information tab on their Client Page. Scroll down until you reach the Service Information and Service Outlets tables. Here you'll see all services this client is part of.



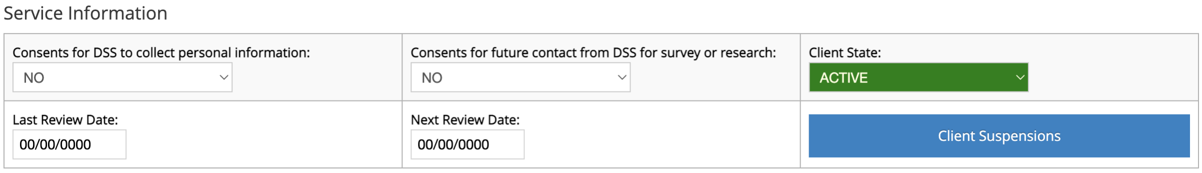
Before a client can be deactivated, they need an End Date for all services they're part of. Then you'll be able to change their Client Status to Inactive. Click on “Save Changes” to complete the process.



Once a client has been deactivated, they will no longer receive meals or have charges added to their accounts. You will not be able to view their Meal Plan, and they will be hidden by default on many pages. They will still exist in Polixen, and if they return, you can re-activate them (see below).

Reactivate a Client

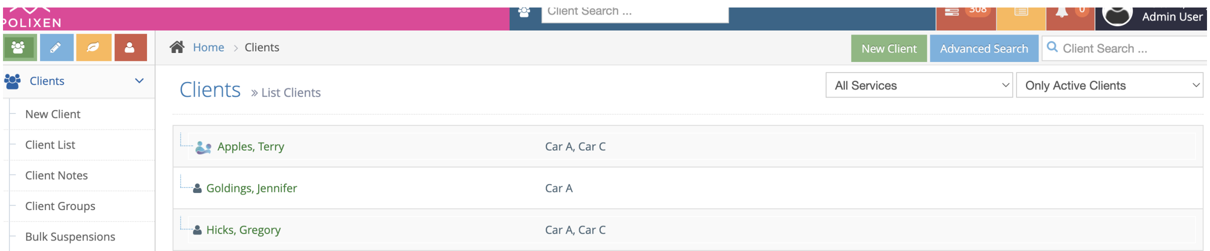
To re-activate a client, navigate to their Client Page. Then change their Client Status to Active and click the Add Service button to add them to a new service.



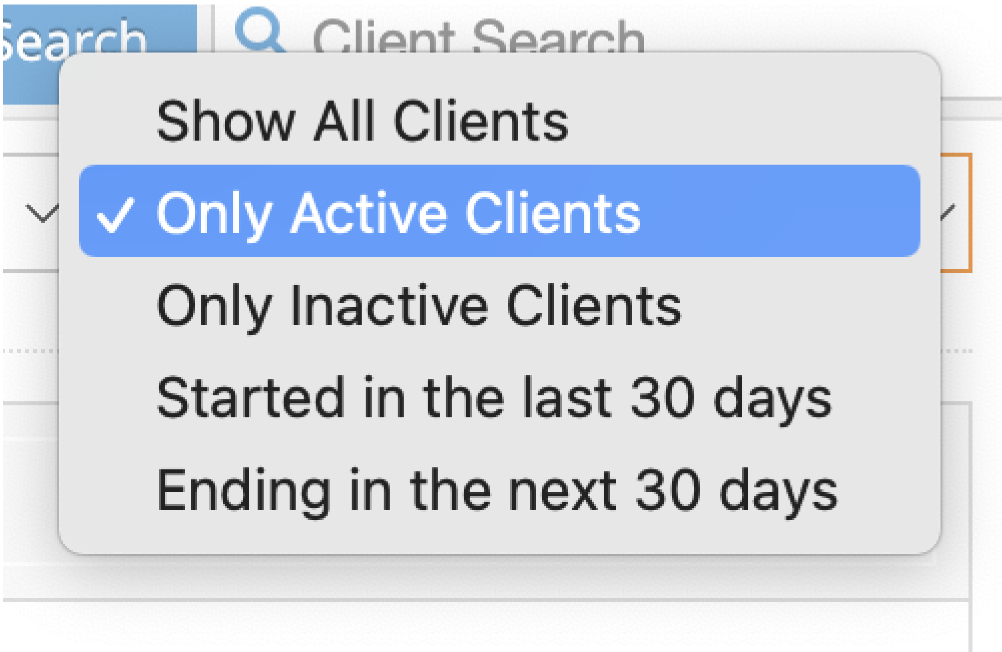
You must enter a Start Date for the new service. Once their new data is entered, click the Save Changes button to update the client. From their new start date, they'll appear on run sheets again, and have charges applied to their account.

Search for Clients

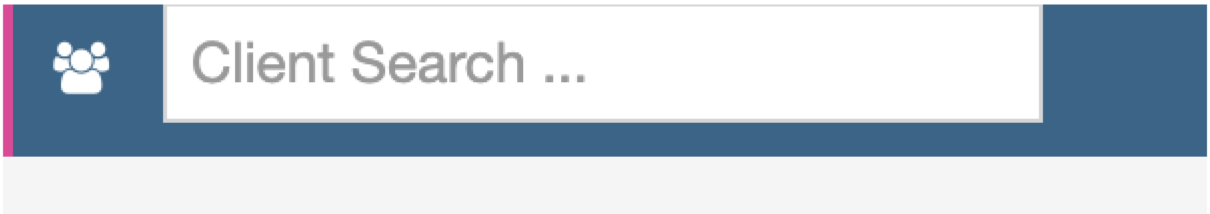
To see the list of all clients (active and inactive), click the Clients option in the menu, then click the Client List option. You can also click the green Clients icon above the main menu.



By default, you will see only Active clients in this list. You can use the Status Filter to choose between displaying All Clients, Active Clients only, or Inactive Clients only.



You can also use the Client Search text field to search for clients with particular names.



In this list, the clients' names are coloured either Red, Green or Blue. These colours relate to the client's current status in Polixen:

Clients with **Green** names are currently **active** in the Polixen system. They will receive meals and charges.

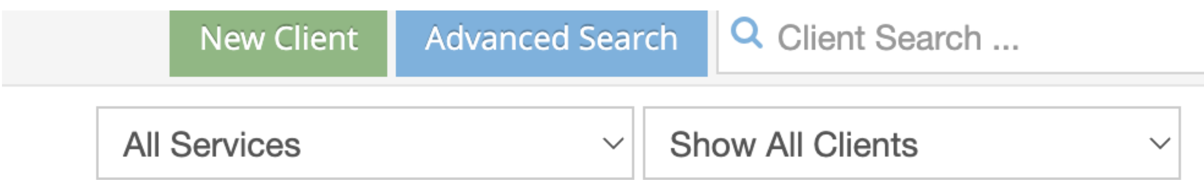
Clients with **Blue** names are currently active, but are also **currently suspended**. Although they are active, they won't receive meals or charges.

Clients with **Red** names are **inactive**. They won't receive meals or charges, and are hidden by default on many pages in Polixen (eg: you cannot view an inactive client's meal plan).

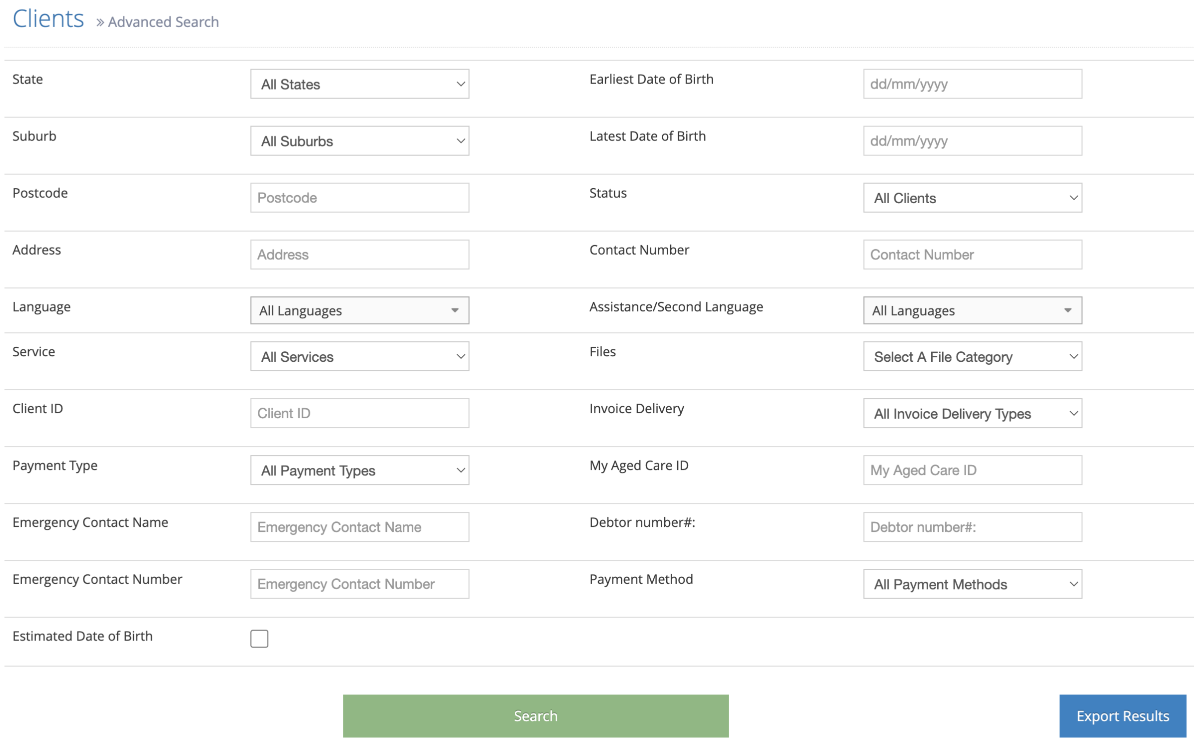
Clients with **Orange** names are currently **floating** in the Polixen system. That means they are active but they are currently not part of any service. These clients will have a warning symbol next to their name on the list.

Advanced Search

To use the advanced search, click the Clients option in the menu, then select Client List, or use the green Clients button above the main menu. Then click the blue Advanced Search button next to the Client Search field.



This button will take you to the Advanced Search page, where you can search for clients using different criteria such as their date of birth, phone number, or address. Once you've entered at least one search term, click the green Search button to display a list of clients that match your search terms.

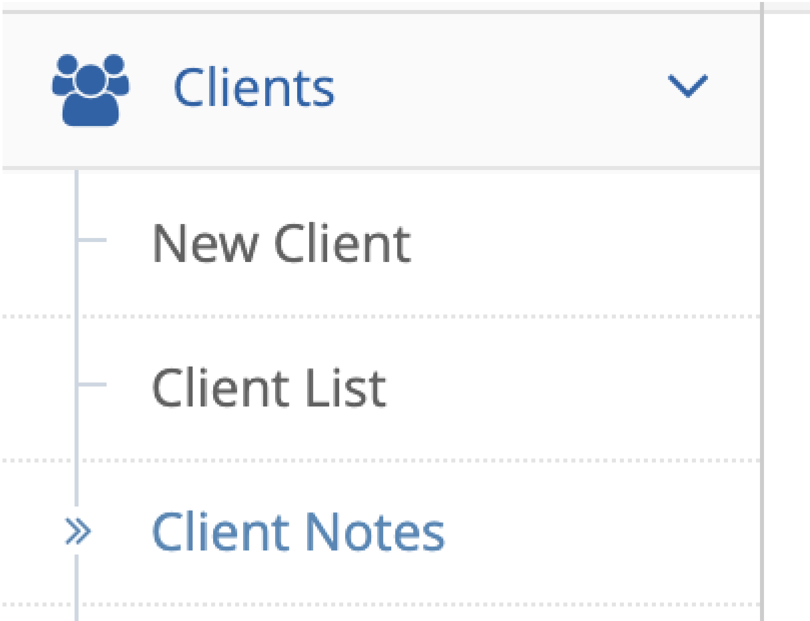


Client Notes

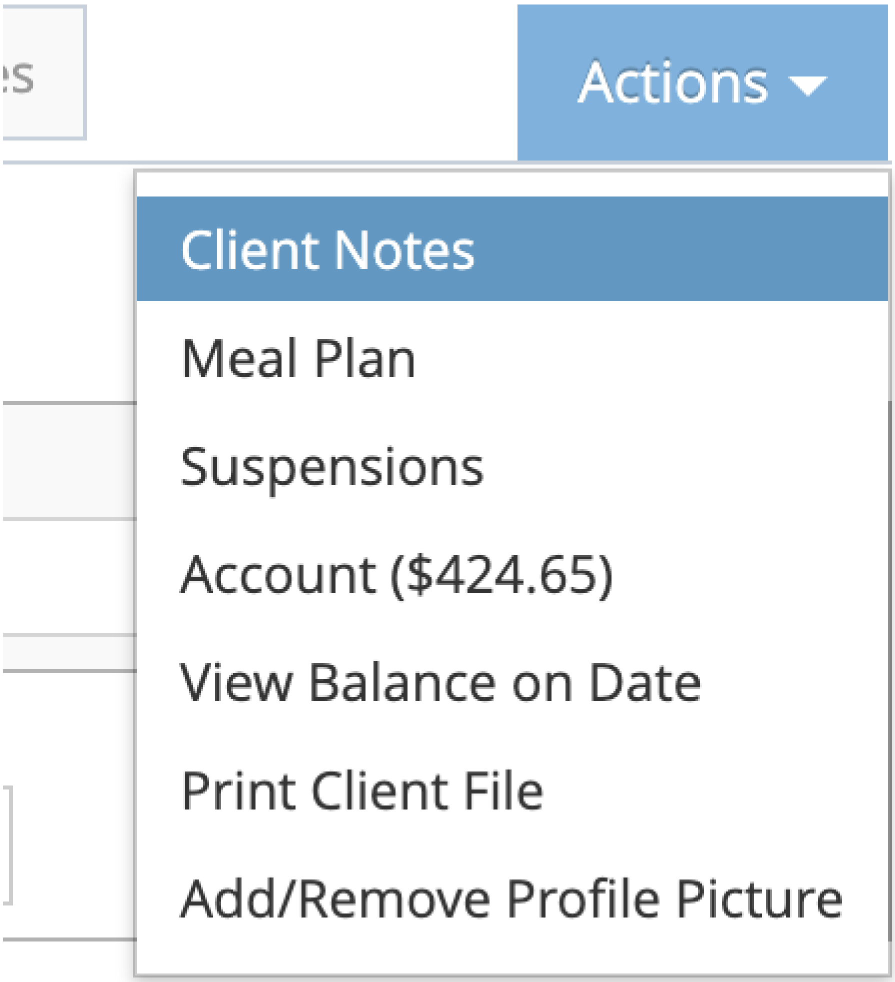
View Client Notes

The Client Notes are a way to keep track of communications with the client, or information changes for clients. You can manually create notes, and the system also creates notes when details are updated in the client's file (eg: when Suspensions are created, changed, or deleted).

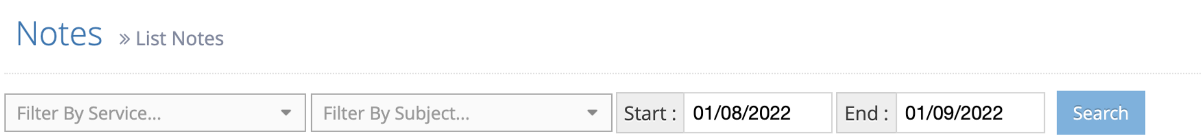
To get to the Client Notes page, click the Clients option in the menu, then select Client Notes.



If you are on a Client Page, you can also use the Actions button to go straight to that client's notes.



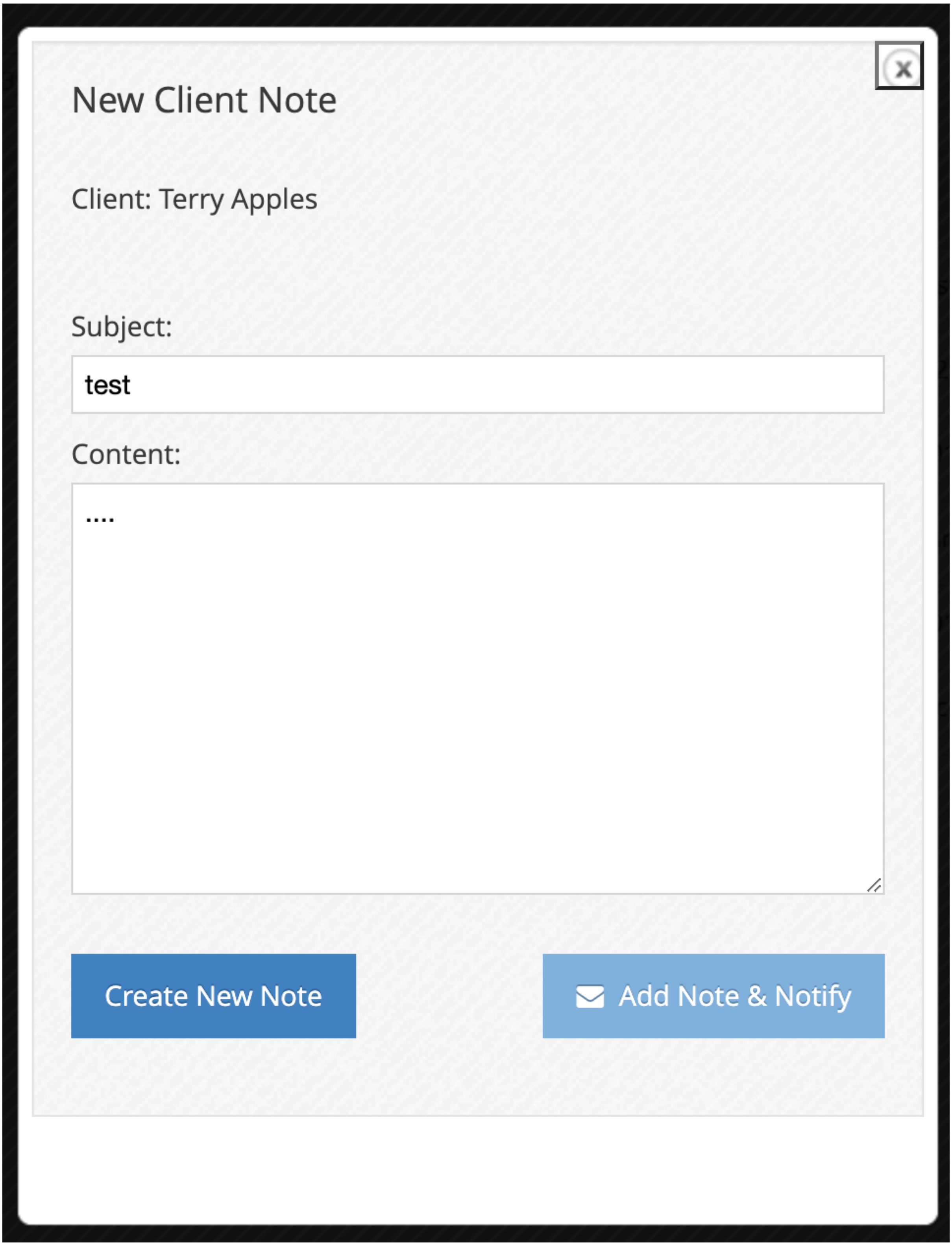
On the Client Notes page, you can filter the notes by clients, services, subject and by date range. If a date range is entered, only notes that were created or updated during that date range will be displayed. Once you enter a date range, click the “Search” button to apply it.



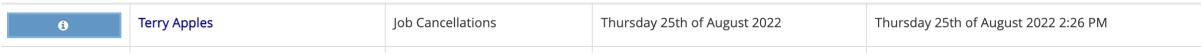
Create Client Notes

To create a new note, click the “New Note” button on the left side. You'll have to enter a client's name, the subject for the note, and the first entry for the note. Click on “Create New Note” to save it or “Add Note and Notify” to send an email notification about that note to selected staff.

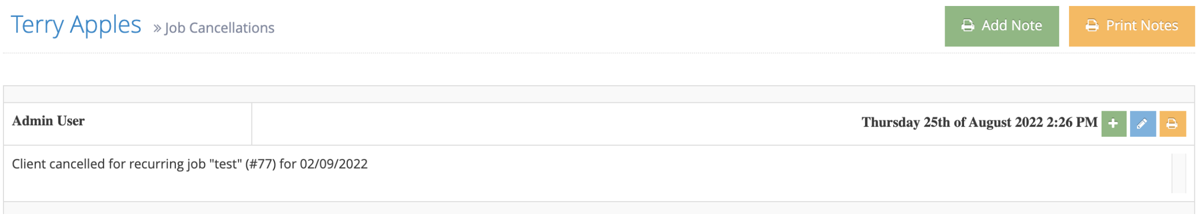
This is useful for letting people know that crucial information about a client has changed. If you choose to simply Add Note, no users will be notified about your entry, but they will be able to view it through the Client Notes page.



To view a note, click the blue Information button next to the note's subject.

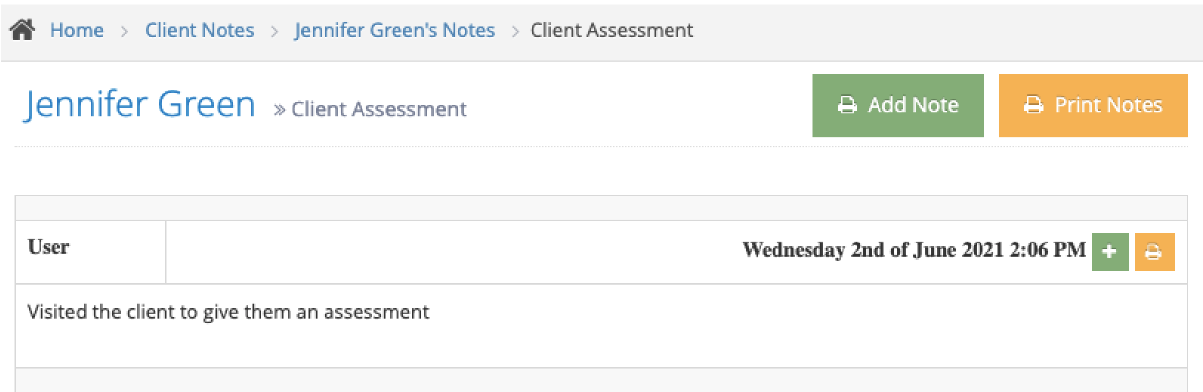


This will take you to the Note Page, where you can see every entry inside this particular note, for example, when the entry was added, and who added it. You can also print a hard copy of the note by clicking the Print Notes button, and add a new entry to the note using the “Add Note” button.

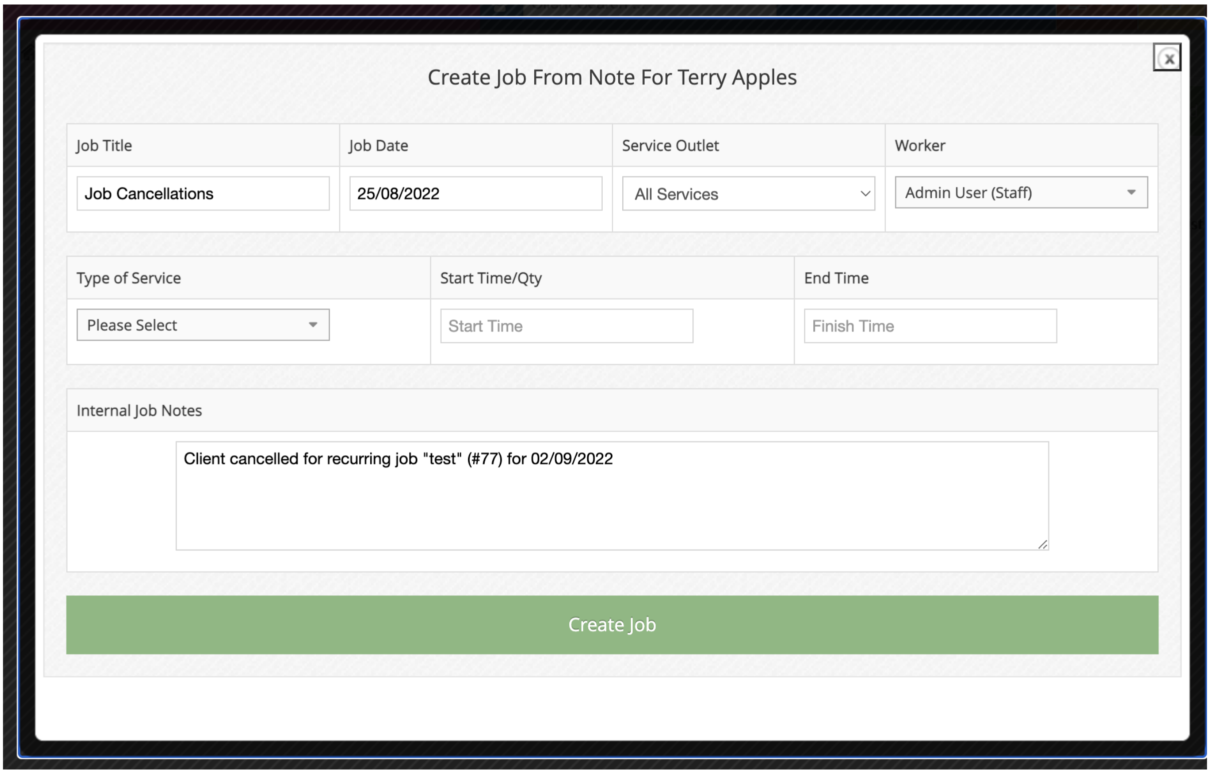


Create Jobs from Client Notes

You can also create once-off jobs from Client Notes. To do this, go to the Client Notes page and click the Information button next to the note you want to work on.



When viewing the note, click the green Plus button next to the specific note entry you want to turn into a job. This will then open the "Create Job From Note" popup.



The following fields will be pre-filled from the information in the client note:

- **Client Name**
- **Worker** (the user who created the note entry)
- **Job Date** (the date of the note entry)
- **Job Title** (the subject of the note)
- **Internal Job Notes** (the content of the note entry)

You will need to fill in the specific job services and times. When you click the “Create Job” button, it will create a once-off job with the details you entered. You can then view and edit that job like any other regular job.