



# Clients

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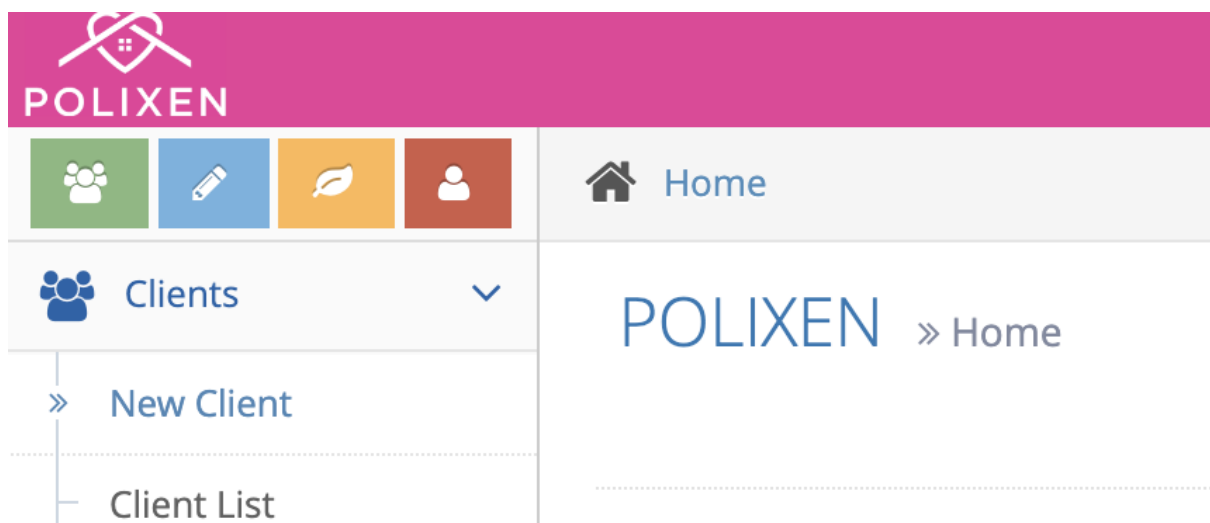
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## Add New Client

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.

[Home](#) > [Clients](#) > New Client

### Name Details

Title: Unspecified	* First Name: First Name...	* Surname: Surname...
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### Contact Details

Home Number: Home Number...	Mobile Number: Mobile Number...	Work Number: Work Number...
Email Address: Email Address...	Fax Number: Fax Number...	

### Address Information

* Address Line 1: Address Line 1	State: NSW	* Suburb: 
Address Line 2: Address Line 2		* PostCode: Postcode

### Additional Information

* Date of Birth: dd/mm/yyyy <input type="checkbox"/> Estimate	Country of Birth Australia	* Gender: Please Select
Spoken Language: English	* Aboriginal/Torres Strait Islander: Neither Aboriginal & Torres Sti	How did you hear about us? How did you hear about us ?

### Service Information

* Service: Please Select	* Commencement Date: dd/mm/yyyy	Next Review Date: dd/mm/yyyy
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#### Comments

Comments...

Create New Client

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.

John Smith (#2200)

Car A

Client Information	Client Contacts	Other Information	Health Information	Meals On Wheels	Service History	Documents & Files	Job Notes	Actions
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Name Details

Title: Mr	First Name: John	Surname: Smith
MYOB Card #: MYOB Card #:	Also Known As: Also Known As...	Using a Pseudonym: NO

NDIS Details

NDIS ID: NDIS ID..	NDIS Plan Start: dd/mm/yyyy	NDIS Plan End: dd/mm/yyyy
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NDIS Budgets

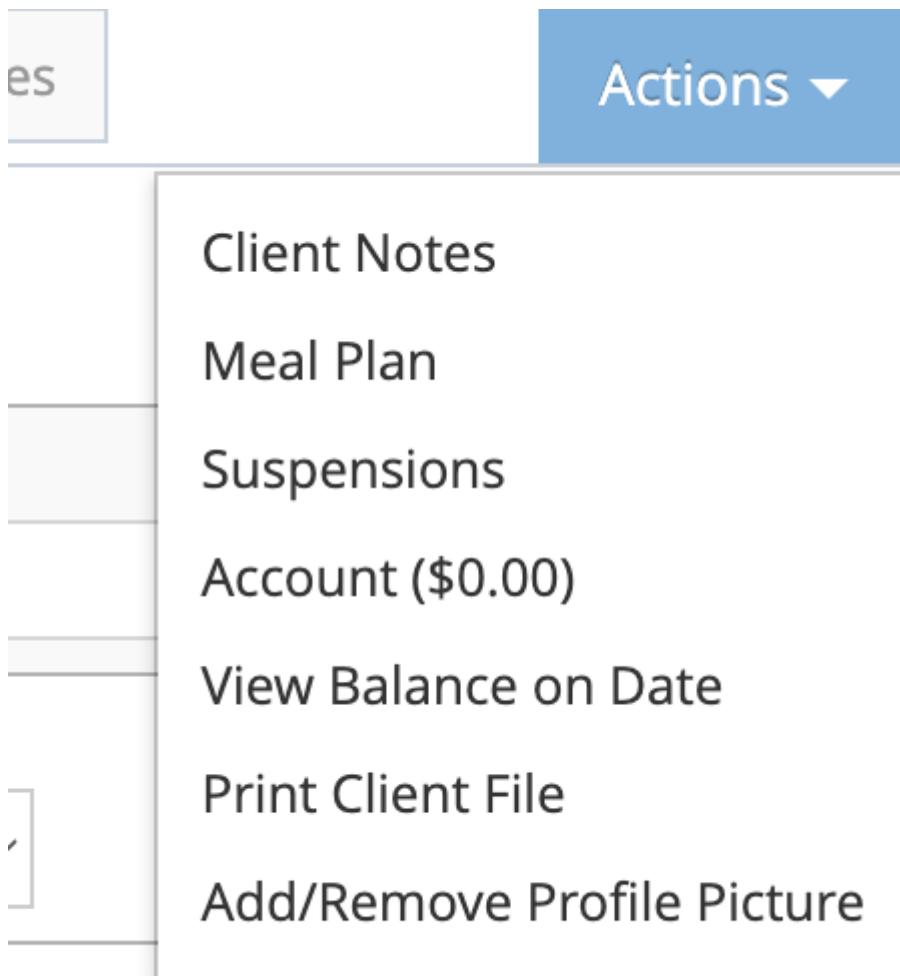
New Budget

	Name	Total	Start Date	End Date	
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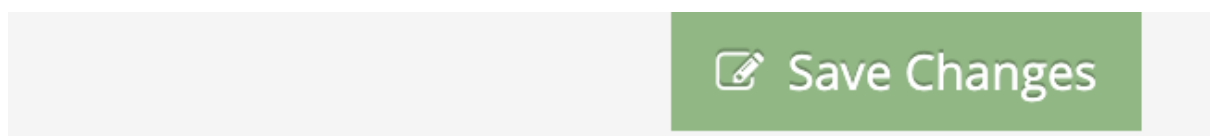
Contacts

Client's Spouse On File: No Spouse	Primary Contact: 0
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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.



Car A

## **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.

Home > Clients > John Smith > Edit Details

Save Changes

Meal History

0 Meals have been delivered in the past 30 days.

Allergies

Please Select:

Dairy ✖

Comments & Notes:

Meal Restrictions

Please Select:

Please select

Comments & Notes:

Meal Properties

Please Select:

Cut Up ✖

Comments & Notes:

Dietary Requirements

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.

Meals & Services Setup

Meals

Meal Ingredients

Meal Categories

Meal Properties

Services

Meal Restrictions

New Restriction


















	Name	Clients	
<div>ⓘ</div>	Vegetarian	<div>👤 1</div>	<div>🗑️</div>

Meal Ingredients





New Ingredient

	Search Ingredients...	Clients	Meals
<div>ⓘ</div>	Artificial colours	<div>👤 0</div>	<div>🌿 1</div>
<div>ⓘ</div>	Crustacea	<div>👤 1</div>	<div>🌿 5</div>
<div>ⓘ</div>	Dairy	<div>👤 1</div>	<div>🌿 46</div>

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.

Meals

Meal Ingredients

Meal Categories

Meal Properties

Services

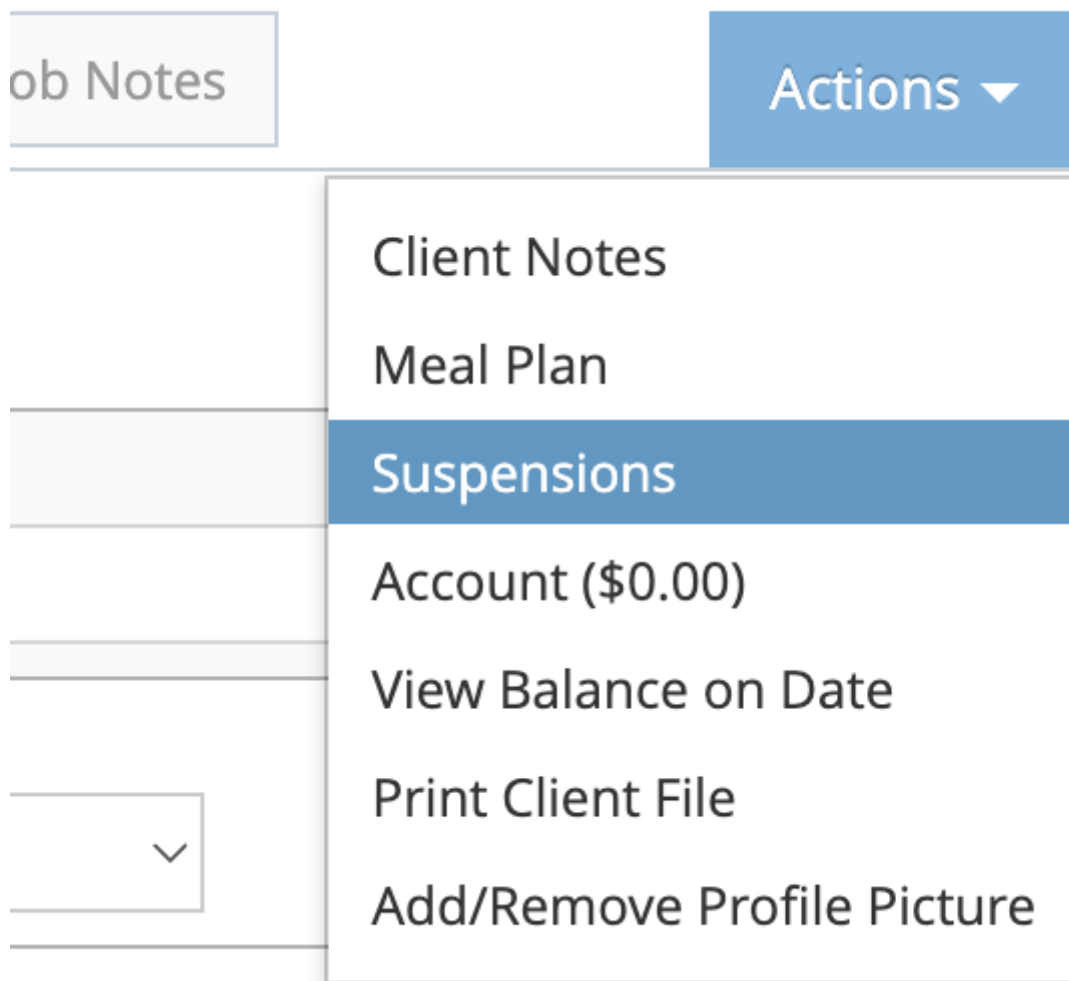
Meal Properties

New Property

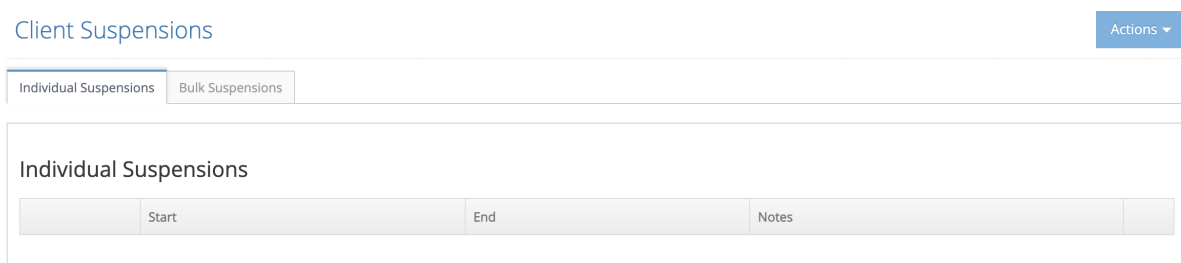
	Name	Clients	Meals
<div></div>	Blended	<div><div></div>0</div>	<div><div></div>0</div>
<div></div>	Cut Up	<div><div></div>8</div>	<div><div></div>131</div>
<div></div>	Pureed	<div><div></div>1</div>	<div><div></div>1</div>

## 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.



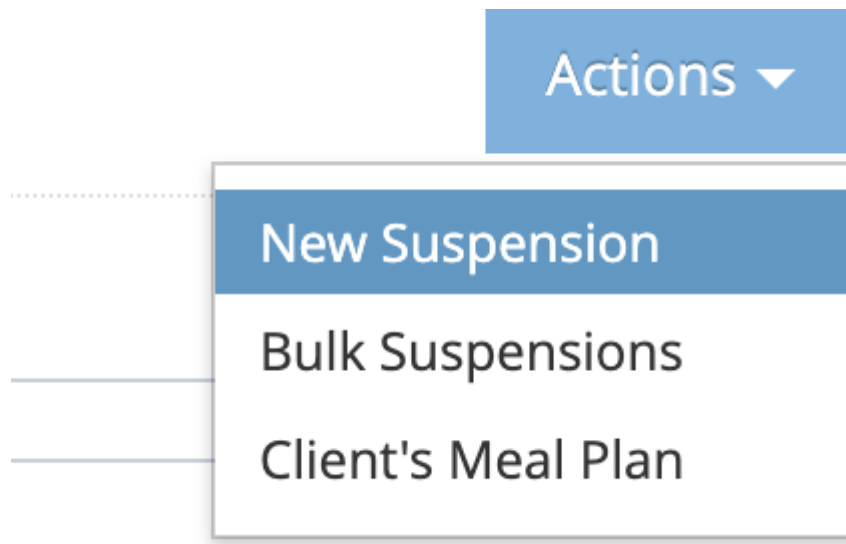


## Bulk Suspensions

	Name	Start	End
	Christmas Day	25/12/2019	25/12/2019
	Queen's Birthday	10/06/2019	10/06/2019

## 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.

	Name	Start	End	Exemptions	Created By	
	Christmas Day	25/12/2019	25/12/2019	0	Admin User	
	Queen's Birthday	10/06/2019	10/06/2019	0	Admin User	

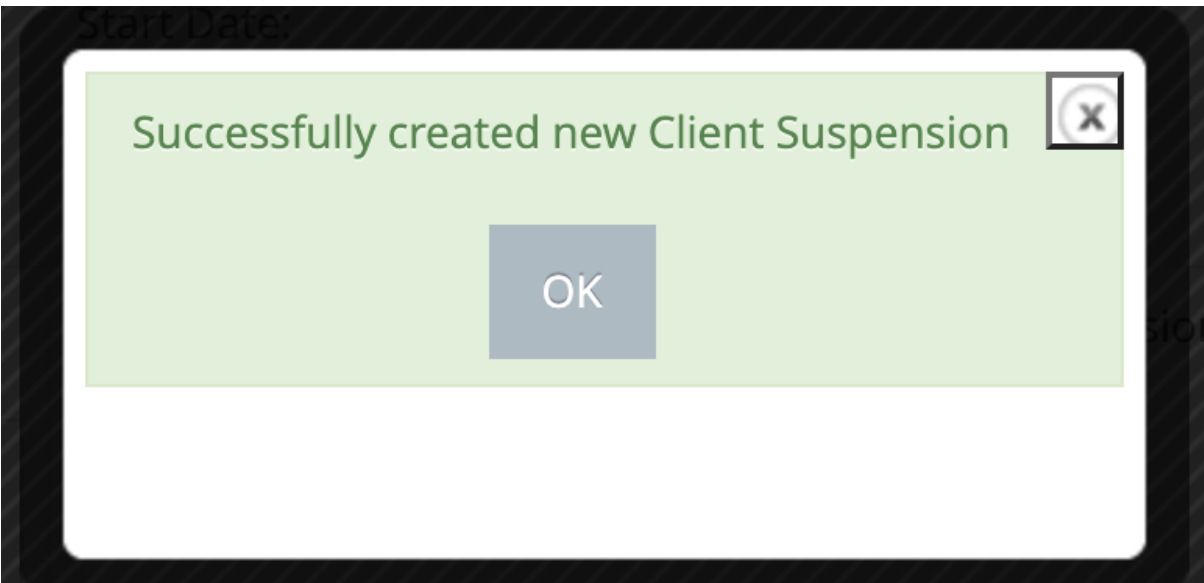
That will open a new page where you can add the Suspension Title, Start Date, End Date and notes. You can also select a specific group of clients to be added to the suspensions.

Bulk Client Suspensions » New Create Bulk Suspension

Please note: this suspension will affect all clients if the group selection list is blank

<b>Suspension Title:</b> <input type="text" value="Suspension Title"/>	<b>Start Date:</b> <input type="text" value="dd/mm/yyyy"/>	<b>End Date:</b> <input type="text" value="dd/mm/yyyy"/>
<b>Notes:</b> <div></div>	<b>Select client groups to only be added to Bulk Suspension:</b> <div>Select Some Options</div>	

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.

Name:	Start Date:	End Date:
<input type="text" value="test"/>	<input type="text" value="03/09/2022"/>	<input type="text" value="04/09/2022"/>
Notes:		
<div></div>		

## Exemptions

Client	
<input type="text" value="Terry Apples"/>	<input type="button" value="Add Exemption"/>

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.

## Service Information

Consents for DSS to collect personal information:	Consents for future contact from DSS for survey or research:	Client State:
<input type="text" value="NO"/>	<input type="text" value="NO"/>	<input type="text" value="ACTIVE"/>
Last Review Date:	Next Review Date:	<input type="button" value="Client Suspensions"/>
<input type="text" value="00/00/0000"/>	<input type="text" value="00/00/0000"/>	

## Service Outlets

Service Outlet	Start Date	End Date	
<input type="text" value="Office A"/>	<input type="text" value="07/01/2015"/>	<input type="text" value="dd/mm/yyyy"/>	<input type="button" value=""/>

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.

#### Service Information

Consents for DSS to collect personal information: NO	Consents for future contact from DSS for survey or research: NO	<div>ACTIVE</div> <div>✓ INACTIVE</div>
Last Review Date: 00/00/0000	Next Review Date: 00/00/0000	Client Suspensions

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.

#### Service Information

Consents for DSS to collect personal information: NO	Consents for future contact from DSS for survey or research: NO	Client State: ACTIVE
Last Review Date: 00/00/0000	Next Review Date: 00/00/0000	Client Suspensions

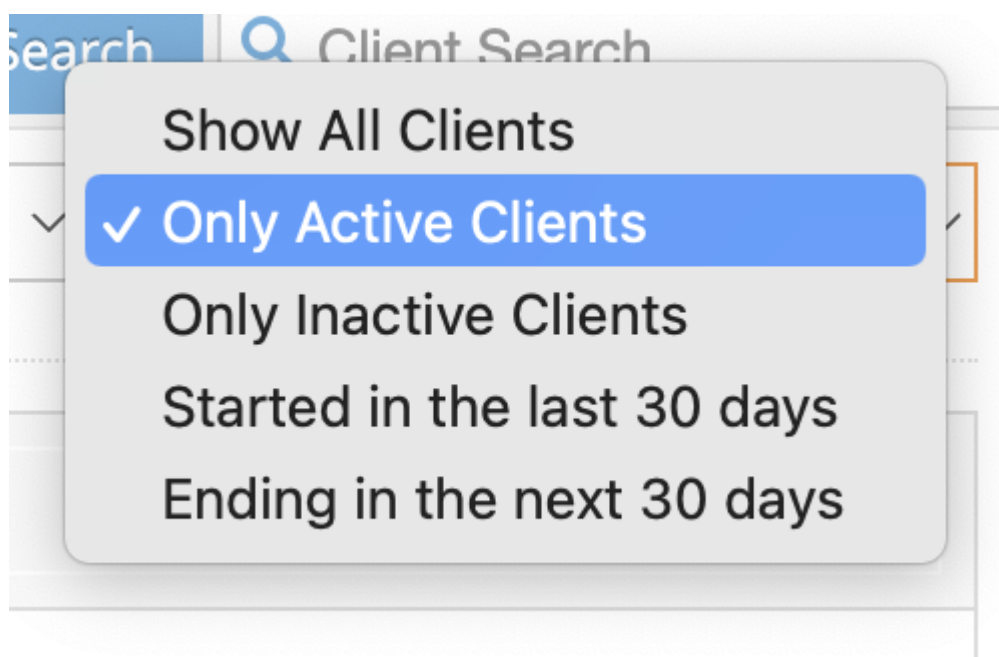
You must enter a Start Date for the new service. Once their new data is entered, click the Save Changes button to update the client. From their new start date, they'll appear on run sheets again, and have charges applied to their account.

## Search for Clients

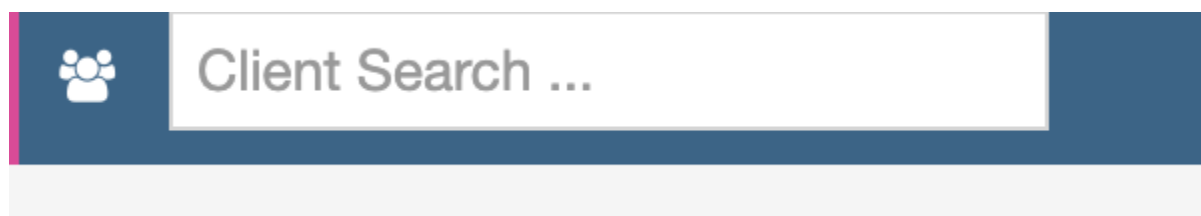
To see the list of all clients (active and inactive), click the Clients option in the menu, then click the Client List option. You can also click the green Clients icon above the main menu.

Clients » List Clients	
Apples, Terry	Car A, Car C
Goldings, Jennifer	Car A
Hicks, Gregory	Car A, Car C

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.

## Clients » List Clients


  Apples, Terry	Car A, Car C
  Goldings, Jennifer	Car A
  Hicks, Gregory	Car A, Car C
  Johnson, Mathew	Car B, Car A
  Jones, Bob	Car C
  McCrimmon, George	Car A
  McCrimmon, Raymond	Car B, Car A

## 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.

New Client

Advanced Search

 Client Search ...

All Services

Show All Clients

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.

State	<input type="text" value="All States"/>	Earliest Date of Birth	<input type="text" value="dd/mm/yyyy"/>
Suburb	<input type="text" value="All Suburbs"/>	Latest Date of Birth	<input type="text" value="dd/mm/yyyy"/>
Postcode	<input type="text" value="Postcode"/>	Status	<input type="text" value="All Clients"/>
Address	<input type="text" value="Address"/>	Contact Number	<input type="text" value="Contact Number"/>
Language	<input type="text" value="All Languages"/>	Assistance/Second Language	<input type="text" value="All Languages"/>
Service	<input type="text" value="All Services"/>	Files	<input type="text" value="Select A File Category"/>
Client ID	<input type="text" value="Client ID"/>	Invoice Delivery	<input type="text" value="All Invoice Delivery Types"/>
Payment Type	<input type="text" value="All Payment Types"/>	My Aged Care ID	<input type="text" value="My Aged Care ID"/>
Emergency Contact Name	<input type="text" value="Emergency Contact Name"/>	Debtor number#:	<input type="text" value="Debtor number#:"/>
Emergency Contact Number	<input type="text" value="Emergency Contact Number"/>	Payment Method	<input type="text" value="All Payment Methods"/>
Estimated Date of Birth	<input type="checkbox"/>		

Search

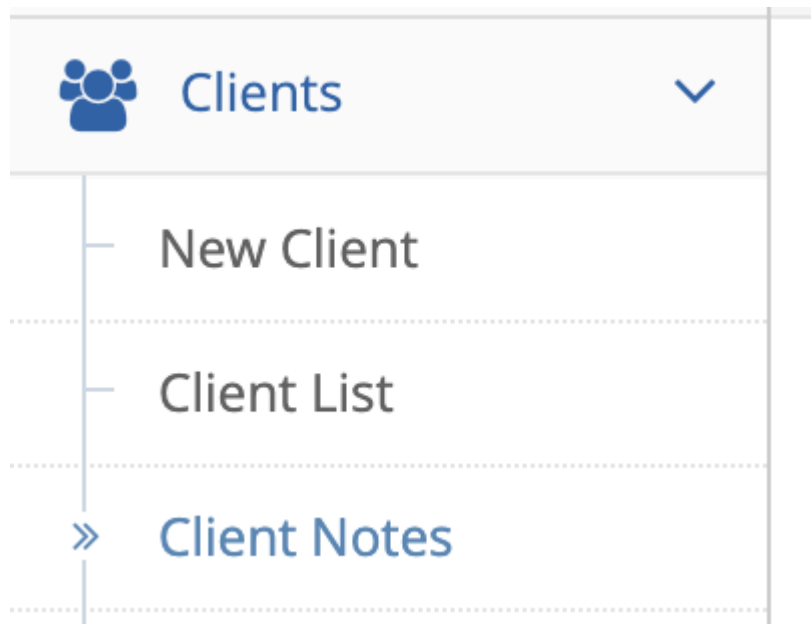
Export Results

## Client Notes

### View Client Notes

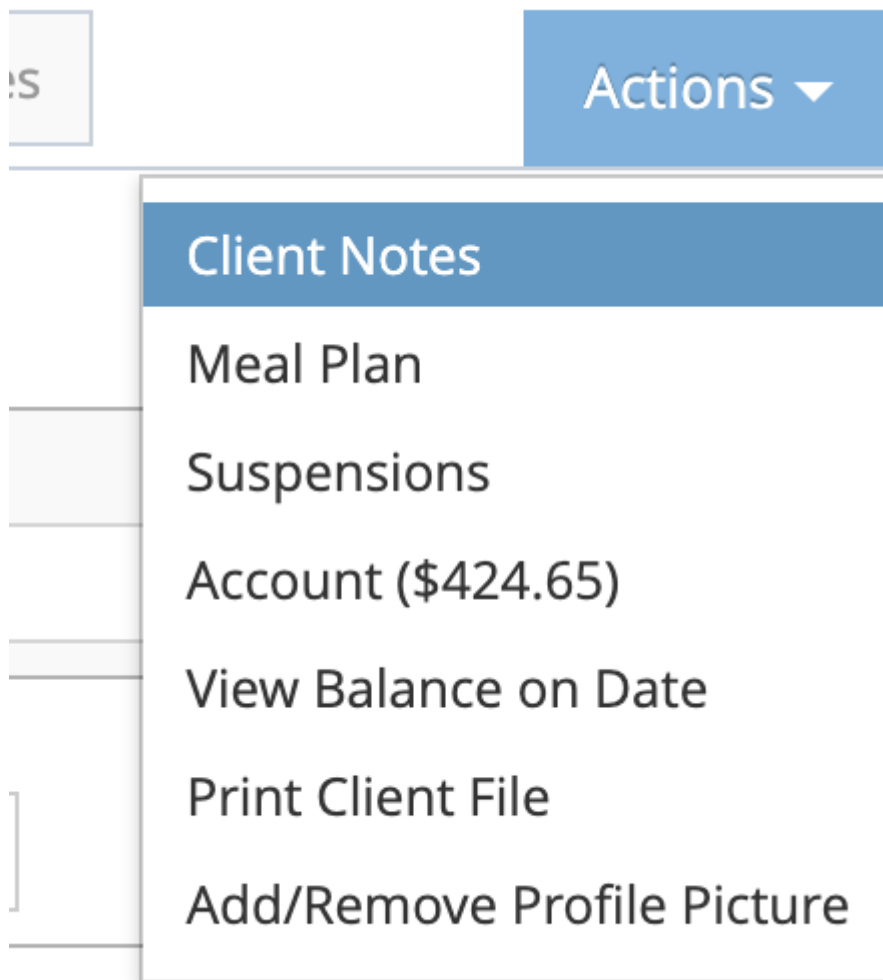
The Client Notes are a way to keep track of communications with the client, or information changes for clients. You can manually create notes, and the system also creates notes when details are updated in the client's file (eg: when Suspensions are created, changed, or deleted).

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.

[Notes](#) » List Notes

Filter By Service...	Filter By Subject...	Start : 01/08/2022	End : 01/09/2022	Search
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## **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.


New Client Note

Client: Terry Apples


Subject:  
test

Content:  
....

Create New Note

 Add Note & Notify

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




	Terry Apples	Job Cancellations	Thursday 25th of August 2022	Thursday 25th of August 2022 2:26 PM
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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.

Terry Apples » Job Cancellations






 Add Note

 Print Notes

Admin User	Thursday 25th of August 2022 2:26 PM	  
Client cancelled for recurring job "test" (#77) for 02/09/2022		

## 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.

 Home > Client Notes > Jennifer Green's Notes > Client Assessment		
Jennifer Green	» Client Assessment	 Add Note  Print Notes
User	Wednesday 2nd of June 2021 2:06 PM	 
Visited the client to give them an assessment		

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.

Create Job From Note For Terry Apples

Job Title	Job Date	Service Outlet	Worker
Job Cancellations	25/08/2022	All Services	Admin User (Staff)

Type of Service	Start Time/Qty	End Time
Please Select	Start Time	Finish Time

Internal Job Notes

Client cancelled for recurring job "test" (#77) for 02/09/2022

Create Job

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.