



A Guide to Demographic Set Up Windows

People Classifications

People Classifications is a set up window that not only defines what classifications are used in the agency, but how they will be used throughout Gatekeeper. The purpose of this document is to provide details about the People Classifications window.

People Classifications

The window contains a list of both required classifications (in gray highlights) and those that the user chooses to add.

- Each line contains checkboxes that tells the system how this classification will be used in Gatekeeper.
 - **Case Note** – the person with this classification can insert a case note in both Anywhere and Gatekeeper
 - **Update web** – this allows for updates to occur with Ohiodd.net.????
 - **Confidential Classification** – no longer used.
 - **Default Mailing** – no longer used.
 - **Allow Relationships** – this checkbox tells the system that Relationships between 2 People records are permitted.
 - **Incidents** – with this checkbox, the user is permitted to write incidents if Incident Tracking is used.
 - **Day Service staff** – this is required if the agency is utilizing a Day Service environment. It defines who is the day service staff.
 - **Show in Caseload** – this checkbox tells the system what classifications should be displayed in the My Caseload Widget used in both Gatekeeper and Anywhere.
 - **Active** – this box allows the user to designate people in the People window this particular certification.

Description	Case Note	Update Web	Confidential Classification	Default Mailing?	Allow Relationships	Incidents	Day Service Staff	Show in Caseload	Active	User ID	Last Update
Administration - Others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PSI	05/15/2019 13:48
Advocate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PSI	06/25/2018 10:46
Applicant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	adm	05/26/2017 07:40
Authorization Contact	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	PSI	04/25/2017 16:25
Authorized Waiting List Contact	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PSI	04/25/2017 16:27

Attachment Categories

The window allows the user to define the type of Attachment categories that will be utilized within the agency.

- To add a line, click insert. The user will then create the Attachment name and determine if that category should be displayed in the Roster/Attachments in Anywhere.
- Security keys are created in the People window of Security.
 - Administrators may determine to give users permission to view all attachments or limit to certain categories.

Attachment Categories

Category	Show In Anywhere	User Id	Last Update
Certification	<input type="checkbox"/>	PSI	3/6/2017 14:31:43
General	<input checked="" type="checkbox"/>	Kcrew	10/7/2020 07:32:30

General General 2 Notes Classifications Relationships Location Intake RFID Attachments

Current All

Description	Category	Start Date	End Date	Show In Anywhere	Last Updated By	Last Updated On
Picture release.pdf	General	08/01/2023	00/00/0000	<input checked="" type="checkbox"/>	ahinger	07/20/23 10:25:44

Note Types

The window allows the user to define note types that could be used within the agency.

- To add a line, click insert. The user will then create the note type and determine if that category should be displayed in the Roster/Notes in Anywhere.
- Security keys are created in the People window of Security.
 - Administrators may determine to give users permission to view all notes or limit to certain note types.

Note Types

Note Type	Show In Anywhere	Last Updated By	Last Updated On
Employment	<input type="checkbox"/>	Kcrew	2/14/2019 11:09:45
General	<input checked="" type="checkbox"/>	PSI	8/3/2017 15:19:54

General General 2 Notes Classifications Relationships Location Intake RFID Attachments

Summary Detail Current All

Type	Start Date	End Date
Medical Information	07/20/2023	00/00/0000

Note: Chase is allergic to peanut butter. Awareness is recommended if Chase is with staff in environment outside of home.

Edit Locations

Locations play a big role in the security and functionality of Anywhere. Every user and consumer must have a location to display in Anywhere. Locations only need to be created when users need to limit the view of certain data, for example case notes.

To search:

- When clicked, a search box will open to search for existing locations.
 - Users may search by location name, address, organization or vendor

To add new:

- Choose an existing entry in the search box and click OK.
- Click insert. The form will highlight required fields.
 - Location Type – these fields are defined in Administration/Edit Code Table (see Code Table documentation to add a new Location Type.)
 - Location Code – the name of location that will appear when adding people to a location.
 - Address1: Street Address
 - City
 - Organization – Choose your county board from the dropdown
 - Vendor – enter a vendor or county board for your new location
 - Make sure to uncheck ‘Residence’ if this is not a residence.
- Secondary Location set up is completed in the Edit Secondary Locations and is outlined in the Outcome/Services documentation

Edit Locations

Roster (F4)

Location Secondary Locations

Active Residence State Site ID: 0 License #: # of Beds: 1

Loc. Type: Organization: Vendor: Service Loc.: Default Day Service Type:

Loc. Code: Address 1: Address 2: City: State: Zip: Phone: () - DRA Site: Last Updated: By: ahinger On: 07/20/2023 10:30:37 AM

General General 2 Notes Classifications Relationships Location Intake RFID Attachments

Day Services	Primary	Start Date	End Date	Supervision Level	Note	Alt. Acuity	Day Service Type	Default Group	User ID	Last Update
AOK Services (Day Service)	<input checked="" type="checkbox"/>	07/20/2023	00/00/0000						ahinger	07/20/23 10:40:06

Edit School Districts

The system is equipped with all school districts in the State of Ohio in alphabetical order based on county. There are times when new districts are added to the system or updates are made to school district names. Much of this information is included in the IDS download, however customers can add a Parent's School District if different than child. This part is not included in the IDS download.

To update:

- Click insert and add the state defined district code and the district name beginning with county if there are multiple school districts in the county.

District Code	District Name	DDIRN	User Id	Last Update
44206	Lancaster City		PSI	03/08/2018 01:53:47 PM
51185	Lawrence County		PSI	03/08/2018 01:53:47 PM

Billing Early Intervention IDS Path to Employment **School/Transition** Slot/Funding

State Student ID: School District: Allen-Bath local S.D.

Education Level: Parent's School District: Allen-Delphos City S.D.

Disability Condition:

Lunches:
 Free Lunch
 Reduced Lunch

Targeted Areas	Start Date	End Date	User Id	Last Update
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