Outcome Tracker Quick-Guide for IDA Program Sites

Go to Vistashare.com
Log-in with user name and password.

Main Tabs will appear: My Vista, News, Forums, Set-up, People/Organizations, Activities and Reports (Sub Tabs will appear once a Main Tab has been selected).

Viewing clients, staff or partners:
-Go to People/Organization main-tab.
-Type in Name and select Search. Make sure appropriate Role or *All* is selected under Role: these are already set up in the system. If you search by the Role function only, it will bring names up for anybody associated with that Role. Select the names you want to view and click Search. Please note that certain sub-tabs will come up for certain Roles.
-Once client is selected (by clicking on their name), their particular sub-tabs will appear (View, Edit, Roles, Activity List, Notes and IDA Accounts)

Adding Transactions/Deposit Activity:
-Go to Person/Organization main-tab
-Type in Name and click on it once it appears underlined
Go to IDA Accounts sub-tab.
-Go to the Transactions Page
-Click New (next to Edit)
-Type in date, type of transaction, amount and so forth. Be sure to scroll down until at bottom. Select Create. The transaction will appear in white box.

To make a change in this section: Highlight the transaction you want to change and hit Edit. Re-enter and click Update. Note: Once statements have been locked (printed and disbursed to clients), the Edit function here no longer works. Click New and select Adjustment under type and fill other information accordingly.

Adding New Clients (or New organization):
-Make sure they aren't already in the system by searching under the People/Organ. tab.
-If not already there, go to People/Organization tab. At the right of the screen, you will see a link that says Add new Person. Click here. (Or click on Add a new organization).
-Enter Name and Select Role (Saver-Agency) and Hit Add.
-Fill out the clients' phone info, email and click Update. Now, complete the Address and Personal Info. section. Without completing, scroll past the following sections: Client Profile, IDA Profile, Monthly Income and Emergency info. Click Update at the bottom.
-Now click on the IDA Application sub-tab. Complete and hit Save.
-Next, go to the IDA Accounts sub-tab.
-Select your agency, program type (Adult-AFI) and Account Status (Open).
-Enter dates (this is up to you, but make sure the Open Date is the date the account officially opened at the financial institution. Enter it manually or with calendar.
-Note that the Savings End Date defaults to 3 years. Feel free to change.
-Scroll down passed where you would enter Closed Dates and select Intended Use.

-Select the Match Source Group and match rate
-Enter monthly savings goal: Leave max annual savings matched and max total savings at $1000.
-Enter Bank info. and leave Last Statement Date blank
-Hit Create and watch as it shows up in box on left.
-If they have more than one account, you would enter it here.

Entering Withdrawals:
a) For a Qualified match withdrawal:
-Select person under People/Organization tab
-Go to IDA Accounts sub-tab and click on Transactions page. Select New.
-Enter date and select Type (Matched w/d purchase) A Withdrawal sub-category pops up. Select Graduated. Scroll down and fill in info. Then click on New Asset and fill in info and hit Create. Then, hit Create again. You will see this info under the Asset page.

b) For an Emergency Withdrawal
-Select person under People/Organization tab
-Go to IDA Accounts sub-tab and click on Transactions page. Select New.
-Select Date and Type (Unmatched Withdrawal) A Withdrawal sub-category pops up.
-Select Emergency Withdrawal, enter any notes and amount and click on Create

c) For an unmatched, non-emergency withdrawal (if they take money out without permission or have excess that they want)
-Select person under People/Organization tab
-Go to IDA Accounts sub-tab and click on Transactions page. Select New.
-Select Date and Type (Unmatched Withdrawal). A Withdrawal sub-category pops up.
-Select Other Withdrawal (or Excess funds, if this is the case), enter notes and amount, and click on Create.

Entering Exit information:
a) After the final qualified withdrawal occurs:
-Make sure you followed step a) above under the Entering Withdrawals directions.
-If so, pull up person and go to IDA Accounts sub-tab
-On the Account Summary page, change account status to Closed, put closed date and reason.
-Click Update
-Go to Transactions Page and click on New
-Enter date of final withdrawal, select type (unmatched withdrawal). A Withdrawal sub-category pops up (put Excess funds if they have some left that won't be getting matched, or Terminated) the amount needed to zero out account, and then select Create. Balance should show as zero.

b) If the client is terminated:
-Search and pull up their name under the People/Organization tab.
-Go to IDA Accounts sub-tab

-On the Account Summary page, change account status to closed, put closed date and reason.
-Click Update
-Go to Transactions Page and click on New
-Enter date of final withdrawal, select type (unmatched withdrawal), amount needed to zero out account, and then select Create. Balance should show as zero.

Entering Training dates/times for a specific client:
-Pull up the participant.
-Click on the Activity List sub-tab.
-Click on Enroll in Activity
-Select the appropriate activity listed under Description, by clicking on it.
-Complete the info and click Update. They have now been tied to this Activity
-If you need to create a new activity that isn't already listed under Descriptions, see the "Create an Activity" instructions.

Printing out Statements:
-Go to Reports tab
-Click on Participant Summary folder and find IDA Statements towards middle of screen list.
-Select monthly IDA statements (next to Query) and a screen will pop up. Be sure your agency is highlighted, your financial institution(s) and the Adult (AFI) is highlighted. For Account status, you can have highlighted Open.
-Enter Statement begin and End Date and click on Run Report (usually month beginning and month ending).
-To view or Print, click on where it says IDA Statements.