

# Step-By-Step Guide to Saving Customer Information

---

The following is a step-by-step guide to saving customer information into the Self-Sufficiency Calculator.

## STEP #1: FIND THE SELF-SUFFICIENCY CALCULATOR ON THE INTERNET

Go to [www.thecalculator.org](http://www.thecalculator.org).

## STEP #2: LOG-IN TO THE CALCULATOR AS A CASE WORKER

On the main page for the Self-Sufficiency Calculator, click on the button at the bottom left of the screen: "Case Manager Log In [click here](#)." On the case manager page, enter your ID & password and click on the "Login" button. Once you have logged in you can register a new customer, search for or list customers, edit registration data, or enter exit data.

*\*(Your manager will give you a Case Manager ID and Password. If you do not have those, please see your manager.)*

## If you are registering a new WIA customer...

### STEP #3: REGISTER A NEW CUSTOMER

Click on "Register New Client." This will take you to the Personal Info page.

### STEP #4: COMPLETE INFORMATION ON CLIENT INFORMATION PAGE

Answer each of the questions on the Personal Info page for your new WIA customer.

### STEP #5: PROCEED TO CALCULATOR

After you've completed the Personal Info Page, click the "Continue to Calculator" button at the bottom of the screen.

### STEP #6: ENTER CUSTOMER DATA

Enter your customer's data on the Wages/Income and Expenses pages. You can navigate easily through the pages using either the tabs at the top of the page, or the "Next" button at the bottom of each page.

### STEP #7: REVIEW CUSTOMER DATA

Go to the Review page to double check the information you have entered. Click on any of the blue "edit" buttons to make necessary changes. Once you have reviewed the information, click on the "Move to Final Report" button.

### STEP #8: SAVE INFORMATION

From the drop down menu at the bottom of the Final Report page, select "Print this page," click on the "GO" button and print the report for your file. Then select "Save registration data & exit calculator" and click on the "GO" button.

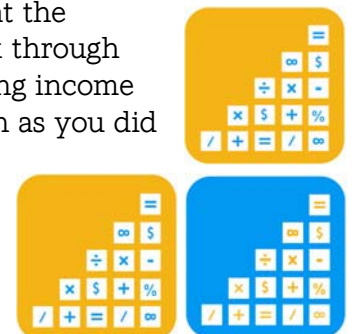
## If you are exiting a WIA registered customer...

### STEP #3: EXIT A CUSTOMER

After logging-in as a case manager, use the client search field to locate the customer's record (you can search by first name, client ID, or SKIES Seeker ID).

### STEP #4: ENTER CUSTOMER DATA

Once you have arrived at the Personal Info page, work through each of the pages entering income and expense information as you did at registration. (Note: the data you entered at registration will appear



on these pages at exit. Edit as needed and leave data that is still current at exit.)

### STEP #5: REVIEW CUSTOMER DATA

Go to the Review page to double check the information you have entered. Click on any of the blue "edit" buttons to make necessary changes. Once you have reviewed the information, click on the "Move to Final Report" button.

### STEP #6: SAVE INFORMATION

From the drop down menu at the bottom of the Final Report page, select "Print this page" and click on the "GO" button and print the report for your file. Then select "Save exit data & exit calculator" and click on the "GO" button.

## If you need to edit customer registration data...

### STEP #3: LOCATE CUSTOMER RECORD

After logging-in as a case manager, use the client search field to locate the customer's record (you can search by first name, client ID, or SKIES Seeker ID).

### STEP #4: EDIT RECORD

Once you have located the record, click on "edit record" and use the tabs to get to the appropriate page(s) to edit registration data.

### STEP #5: SAVE INFORMATION

Once you have made the necessary changes to customer registration data, go to the Final Report page. From the drop down menu at the bottom of the page, select "Print this page," click on the "GO" button, and print the report for your file. Then select "Save registration data & exit calculator" and click on the "GO" button. [Please note: registration data should reflect customer information at the time of registration; only make edits if you find that the information initially entered was incorrect at the time. Do not make edits to reflect changes in circumstances that occur after registration.]