

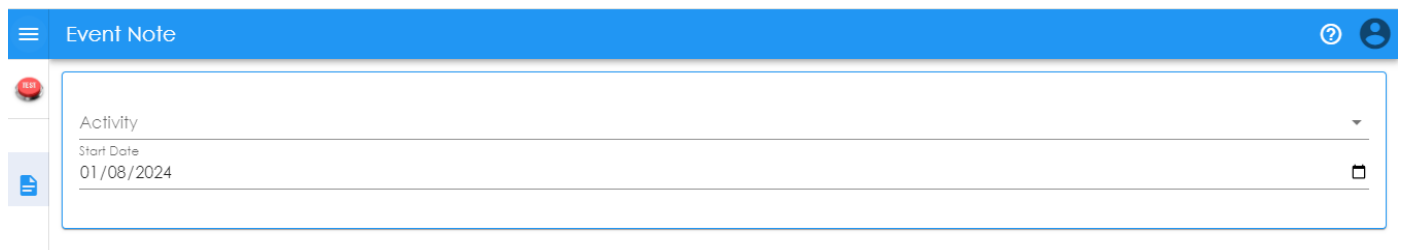
## Meet and Greets

1. Enter a participant name in the client selector on the dashboard.



Meet and Greets  
/ No Show

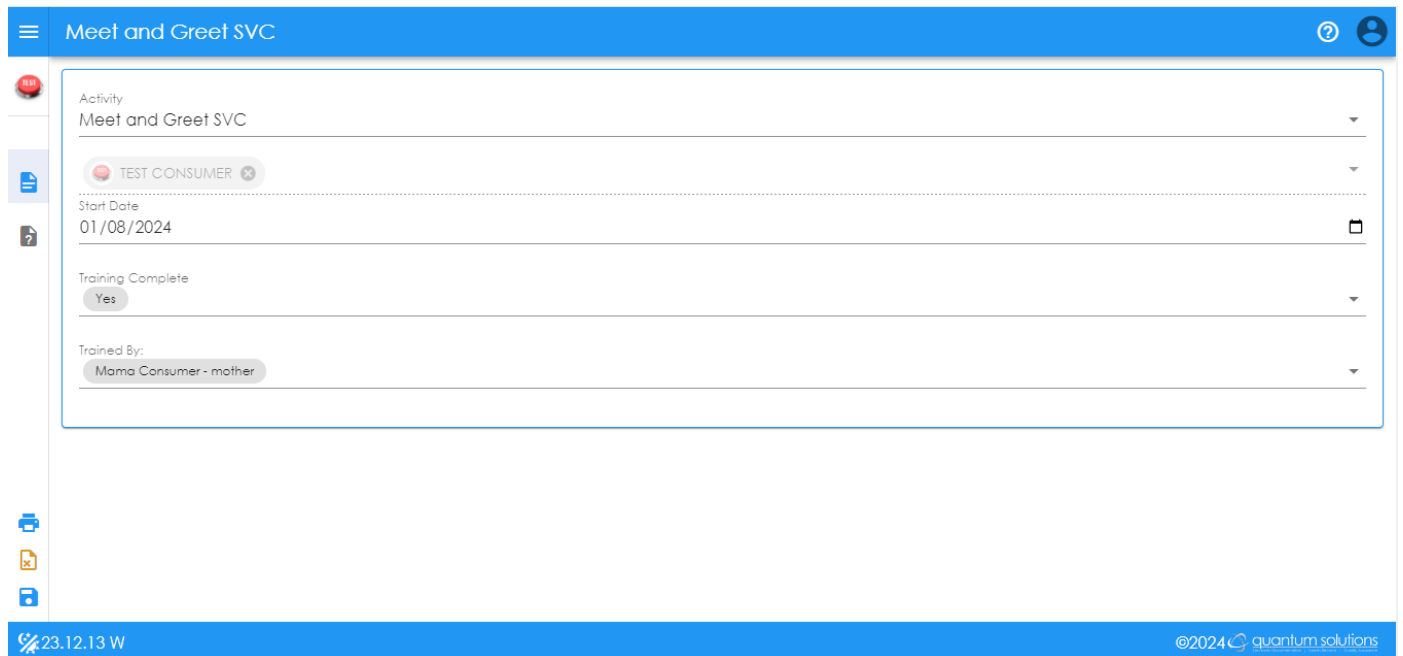
2. Click the “Meet and Greet/No Show” image.
3. Choose “Meet and Greet Daycare” or “Meet and Greet SVC” from the Activity drop down.



The screenshot shows a software interface for an 'Event Note'. At the top is a blue header bar with a hamburger menu icon on the left, the text 'Event Note' in the center, and a circular refresh icon and a user profile icon on the right. Below the header is a white form area with a red 'ERR' notification icon on the left. The form contains two rows: the first row is labeled 'Activity' and has a dropdown arrow on the right; the second row is labeled 'Start Date' and has the value '01/08/2024' and a calendar icon on the right. A document icon is visible on the left side of the form area.

4. Select the **Start Date** of the Meet and Greet. The default date is set to today.
5. Choose Yes or No for Training Complete
6. Enter the first and last name of the person who trained you + their relationship to the participant.

**Example- Mama Consumer – mother**



Meet and Greet SVC

Activity  
Meet and Greet SVC

TEST CONSUMER

Start Date  
01/08/2024

Training Complete  
Yes

Trained By:  
Mama Consumer - mother

23.12.13 W

©2024 quantum solutions



**Q and A Form-** The icon location is in the side panel menu on the far-left side.

### How to complete the Training Checklist

To finish your note, the next step is completing the training checklist. Click on the question mark icon and a new page will open.

Click on the heading called **Meet and Greet Checklist**. This will open a new field. Click on the word- Narrative - and record a short description of the meeting.



**Example- We discussed what Test will need help with during respite.**

☰ MEET AND GREET ? ⌂

1 Meet and Greet Checklist

Section Started

▲ Description of training provided:

Narrative  
 We discussed what Test will need help with during respite.

Click on the heading labeled **Trained**.



Turn the dial on for each training item (Yes or No) according to if you trained on the item or not. If it does not apply, turn the dial to N/A. An example of N/A would be if Test did not have seizures.

If you wish to add Additional Topics, you can type additional information in the last section as shown below.

☰ MEET AND GREET ? ⌂

1 Meet and Greet Checklist

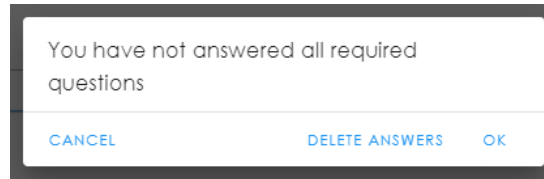
Section Started

▲ **Trained**  
Required: 19

Household Environment  
 Search  
 Yes  
 No  
 NA

2 Additional Topics  
 Narrative

Click **Finish**. The documentation will be saved and automatically closed. If you missed one or more questions, you would see a message prompting you to re-review the note.



Simply click OK and then return to the note and locate what was missed, re-submit the note.