

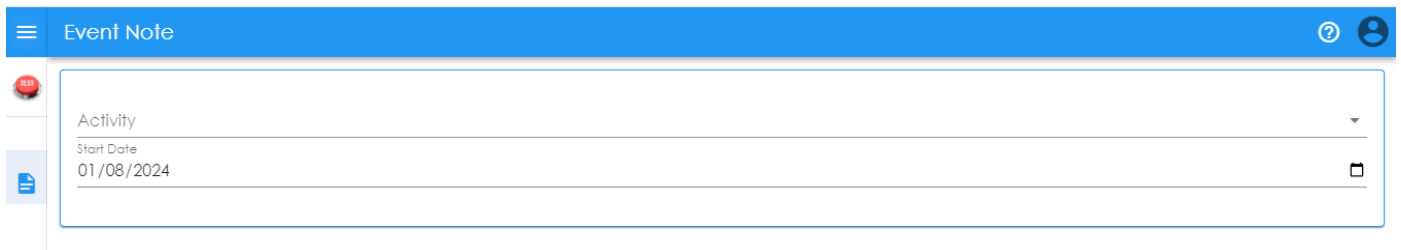
## Meet and Greets

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” from the Activity drop down.



The screenshot shows a software interface for an 'Event Note'. At the top, there is a blue header bar with a hamburger menu icon on the left, the text 'Event Note' in the center, and a user profile icon on the right. Below the header, there is a form area. On the left side of the form, there is a vertical sidebar with a red 'ES' icon and a document icon. The main form area contains a dropdown menu labeled 'Activity' with a downward arrow, which is currently open and shows 'Meet and Greet' selected. Below the dropdown, there is a field labeled 'Start Date' with the value '01/08/2024' and a calendar icon on the right.

4. Select the Start Date of the Meet and Greet. The default date is set to today. You can type or use the calendar option.
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 ⓘ ⌵

Activity  
Meet and Greet

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TEST CONSUMER

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|                          |                        |
|--------------------------|------------------------|
| Start Date<br>01/08/2024 | Start time<br>10:00 AM |
| End Date<br>01/08/2024   | End Time<br>10:30 AM   |

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Training Complete  
Yes

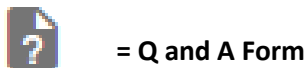
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Trained By:  
Mama Consumer- mother

🔗 23.12.13 W ©2024 quantum solutions

### How to complete the Training Checklist

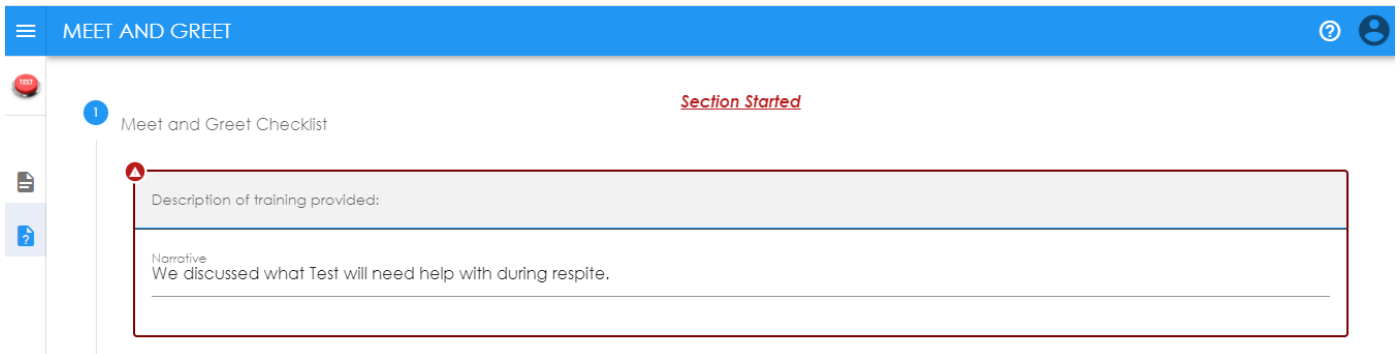
To finish your note, the next step is completing the training checklist. Click on the question mark icon and a new page will open. The icon location is in the side panel menu on the far-left side.



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.

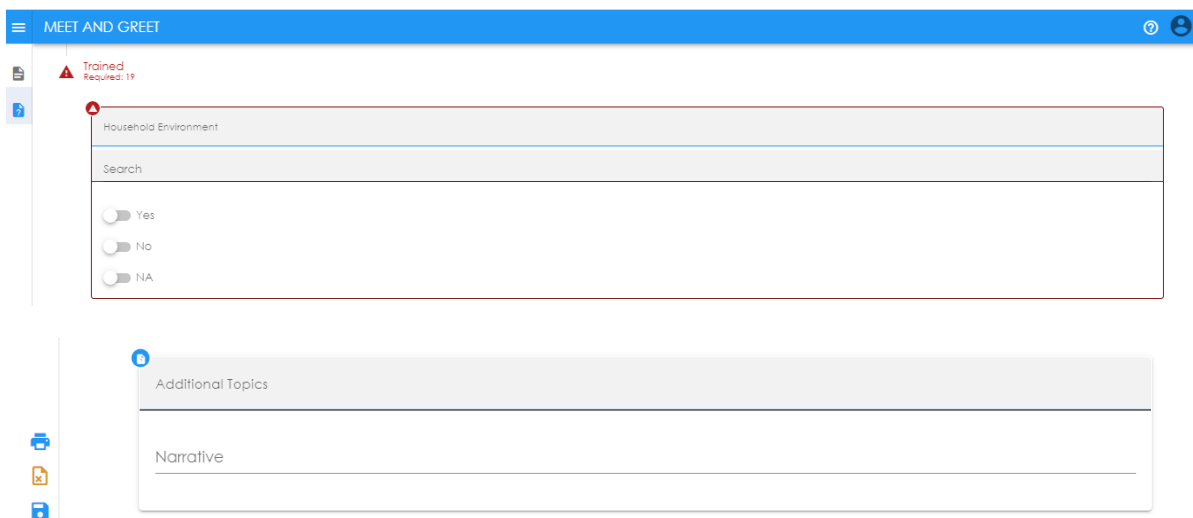


Click on the heading labeled **Trained**.



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.



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.

You have not answered all required questions

[CANCEL](#) [DELETE ANSWERS](#) [OK](#)

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