# Caretaker Check in

#### MS Team member

1. A caretaker will come to the front desk to check in with their client

#### If This is Their First Time in

1. Have the person fill out the Caretaker Form. Look them up in Daxko, follow the corresponding steps below
2. Note in the top right corner of the Caretaker Form that is has been entered, include your initials and the date
3. File the Caretaker Form in the appropriate folder in the top drawer of the Membership File Cabinet

#### If person is not in Daxko

1. Activate the person as a new member. See how to activate a New Member SOP, choose community member as the membership type
2. Check them in
3. Add a yellow alert to their account saying: Caretaker for “Client Name”

#### If a Community Member

1. Click on the pencil next to the word inactive to edit
2. Choose Community Member
3. Enter additional information if requested by Daxko, especially Brithdays
4. Click next
5. Choose which members should be active
6. Click next
7. You can type in the adult member’s name and sign the waiver for them at this step
8. Click I agree
9. The system will set up this membership to automatically terminate in 1 year, it will also say there is no charge
10. Click next
11. Click on Membership Information
12. Check them in
13. Add a yellow alert to their account saying: Caretaker for “Client Name”

#### If Inactive Member on Active unit

1. Keep the community member as inactive
2. Add a yellow alert above their name that says: Member “First Name” is a caretaker for “Client Name”, please keep inactive due to active member in this unit

#### If active community member

1. Check them in
2. Add a yellow alert to their account saying: Caretaker for “Client name”