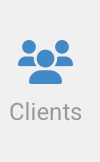
Clients Module

August 18th, 2023

# Overview

Clients can be defined as your valued customers. There are two distinct types of clients: Individuals and Groups. Individuals refer to individual customers, as well as families or retail customers. On the other hand, Groups comprise employers, companies, or associations.



## Individual and Group Clients

This module equips you with essential tools to efficiently manage both individual clients and groups/companies.

## Manage client information

Effortlessly oversee clients' service/case information, approve or decline memberships, add transactions, send agreements, and perform additional management tasks with ease.

# How To

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**Set up a primary individual client**

An individual **client** refers to an individual who either seeks your services or becomes a member in order to avail the services provided by your organization.

To add an Individual Client:

* Go to the clients module from the left menu bar > individual tab
* Click the +Add button.
* The next screen will be an online form to complete. There are four different client types:
  + Primary
  + Dependent
  + Group
  + Group Member
* Select the Primary, complete Name, date of birth, email, phone, and address information, and select Save.
* Next, select the desired offering and add the start date,
* The next screen is for billing/payment options.
* Next, add payment information in the billing tab.
* Files can be uploaded using the +Upload files button on the top right of the files tab.
* Once completed, files uploaded will appear and can be downloaded, renamed, and viewed by clicking on the ellipses on the far right.
* Client ID card can be viewed in the ID tab (if the setting has been turned on).
* Client status is “Submitted” by default and they will only be charged once “Approved”.

**Add a dependent to a primary client**

A **dependent** is an individual who is connected to another person, either through family ties or some form of association.

To add a Dependent to a Primary Member:

* Go to the clients module from the left menu bar
* Click on the +Add button on the top right
* Select Dependent and choose Primary member and relation to the primary member.
* Complete the form.
* Click Save.
* Next, the bundle option will show, select, and save.
* Complete Billing.
* Add any Files.

[Alternatively use the ellipsis button.](#qb8nc667p5eu)

**Set up a group or a company**

A **Group** or a **Company** encompasses a significant number of individuals who are interconnected. This may comprise a company, clinic, facility, or any other establishment that will collectively utilize the same range of services or products that you provide.

To add Group, go to the clients module:

* Go to the clients module from the left menu bar > Group tab
* The next screen will be an online form to complete. There are four different client types:
  + Primary
  + Dependent
  + Group
  + Group Member
* Select Group, add the group information and contact information for the group and select Save.
* Next, select the desired membership offering type and add start date,
* The next screen is for billing/payment options.
* Next add payment information in the billing tab.
* Files can be uploaded using the +Upload files button on the top right of the files tab.
* Once completed, files uploaded will appear and can be downloaded, renamed and viewed by clicking on the ellipses on the far right.
* Client ID card can be viewed in the ID tab. (if the setting has been turned on)
* To approve a client use the ellipses on the far right and select “Approve”.
* Client status is “Submitted” by default and they will only be charged once “Approved”.
* Bundle options may also be edited using the ellipses ->modify bundle option.

**Add someone to a Group**

An individual that is associated with the group or company that takes part in your company.

To add Members to a Group:

* Go to the clients module from the left menu bar > Group tab
* Locate the appropriate group to add your new member to.
* Click on the ellipses to the far right.
* Select Add Member.
* Form will default to Group Member
* Complete the form [same form to create group] including:
  + Personal information
  + Bundle
  + Billing
  + Files
* Members can now be seen by clicking the + to the left of the group name. (Click the - to shrink back to group).

**Client Quick View function (+)**

The purpose of this view is to provide a convenient overview of the enrollments, offerings, and services that the client has registered and paid for with your company. Additionally, it allows you to access information about their billing transactions and any ongoing cases initiated on their behalf.

* Click on the + sign on the left-hand side of clients to get a quick view of client details.
  + Membership on the primary client shows all of the enrollments associated with primary and dependents.
  + The billing section displays all recent transactions, including any upcoming recurring transactions, for easy reference.
  + The Cases section exhibits the most recent five cases associated with the client, providing the option to directly access and open a specific case from this location.

Update Billing

Clients billing information can be changed from their profile

* Go to the clients module from the left menu bar
* Go to client > ellipses > edit profile
* Switch to billings tab
* Choose the payment method you would like to add
* When multiple payment methods are on file, there will be an option to set as primary. The payment method thats is set as primary is the one that will be billed.

**Client Ellipsis functions (⋮)**

There are additional functionalities available for each client that you provide support you will find under the ellipsis.

**Edit profile.** In the edit profile section, you have the ability to modify various client information including address, phone number, email, tags, and add notes. It also allows you to view the existing membership status (if applicable), update billing details, and upload any relevant files for that specific client.

**Approve membership.** After you create a client either an Individual or a group they are put into a submitted status. No transactions will happen until the client or group is approved. Clients that are approved already transactions will automatically go through if a change in membership happens.

* Once approved, clients will receive a receipt and a welcome email (if a.
* Once declined, clients will receive email with notes (if any provided)
* **NOTE: If a client is approved 7 days after the enrollment date the client will NOT be charged.** A subscription will be created and the client will be charged on the next payment date (monthly, quarterly, yearly). Payment will have to be done manually through the “Add Transaction” found in the ellipsis for the first payment.

**Decline membership.** Once a client, whether an individual or a group, is created, they are initially placed in a submitted status. In the event that you decide not to include this client in your offerings or services for any reason, you have the option to decline them. However, you can always reinstate them by modifying the membership whenever necessary.

**Modify membership.** The modify membership section is only visible once membership is in approved status. This provides a comprehensive explanation of the membership, including fees, benefit dates, and options to either **complete** or **cancel** and add an end date. Here, you can view all currently **active** memberships as well as past **inactive** memberships. Additionally, you have the flexibility to change or update a membership by specifying a new start date for the desired benefit.

To add additional membership:

* Go to the clients module from the left menu bar
* Find the client you want to update membership for
* Click on ellipses > modify membership
* Click +Add on the modify membership popup
* Select membership from the list
* Click on drop down to switch to Public/Private bundle (Private can only be chosen/seen by admin).
* Add start date of new membership.
* Select Continue.
* Confirm.

To cancel existing membership

* Go to the clients module from the left menu bar
* Find the client you want to update membership for
* Go to ellipses > modify membership
* Click cancel button next to the membership
* Select date to cancel/complete membership
* Add note (optional)
* Confirm

Change membership start date.

Membership start dates that have yet to begin can be changed.

* Go to the clients module from the left menu bar
* Find the client you want to update membership for
* Go to ellipses > edit profile
* Membership tab
* Choose the desired membership type and start date.

Change membership end date.

For membership that have yet to end, membership end date can be changed.

* Go to the clients module from the left menu bar
* Find the client you want to update membership for
* Go to ellipses > modify membership
* Click on the drop down to view Active/Inactive memberships.
* Click complete and specify membership end date

**Add Transaction.** This is a manual method available to add a one-time transaction to a client for any of your offerings.

* Go to the clients module from the left menu bar
* Find the client you want to add transaction for
* Ellipses > Add transaction

**Send Agreement.** You can send a document to a client for their signature. This is particularly useful when you require the client to sign a document before approving their membership or enabling them to purchase services from your company.

* Go to the clients module from the left menu bar
* Find the client you want to send agreement to
* Ellipses > Send agreement

To permanently **delete a client/member** please contact support@vitafyhealth.com

**Client status meaning**

* **Submitted**
  + The initial status when a client is created is referred to as the "First Status." This status can be completely customized and altered as per your requirements.
* **Approved**
  + A fully executed client refers to an individual who has completed all necessary steps, including signing documents, making payments, and filling out all required forms. Such clients meet the eligibility criteria and qualify to avail themselves of your services.
* **Canceled** 
  + A client who chooses not to renew their membership ahead of time or a client for whom you no longer wish to offer services.
* **Declined**
  + A client who wishes to terminate their current membership or does not desire to continue with their existing membership.
* **Active**
  + A client who currently holds an active membership Their membership could be canceled, but the end date is in the future.
* **Inactive**
  + A client without an active membership, including any prior enrollments that are no longer active.

NOTE: If there are any missing items or if you require access to something mentioned above, please feel free to contact Vitafy support at support@vitafyhealth.com for any inquiries.

**Activate account for client login**

To send invite to clients so they can activate their Vitafy account:

* Go to the clients module from the left menu bar
* Find the client you want to send invite to activate account
* Go to ellipses > Send Invite
* If they misplaced the first activation email, another invite can be sent to activate the account
* The Activate Account link in the invite pre populates the clients sign up page with their email address but is editable (We suggest to add unique username for clients using same email under multiple profiles i.e. primary member and dependent members that have same email)

*Please note that clients can only have accounts (can send invite to) when their profile has an approved enrollment.*