
Agenda – July 30-31, 2019

IACIS Training

Location: CityChurch, 2400 Oakwood Rd, Ames, IA 50014
North Ed Meeting Room

Tuesday, July 30

9:30 – 10:00 Introductions, Objectives and Overview

10:00 - Household/Member/Program Activity Data Entry

- **Program/Service – Updating demographics**
- **Payments**
- **Follow Ups**
- **Problem Statements**
- **Referrals**
- **Legislative Tracking**

11:00 – Break

11:15 – LIHEAP DISCUSSION

- **Vendor Notifications**
- **Vendor Correction**
- **Crisis Application (when using LIHEAP funds)**

12:30 - LUNCH

1:15 - Error Tracking

2:00 - Case Management and Self Reliance Review

2:45 - Break

3:00 - Paperless – Electronic Signatures

3:45 – Client Contacts or Quick Security Overview

Wednesday, July 31

- 8:30 Review of Tuesday Topics
- 9:00 ReportBUILDER – **ARCHITECT LEVEL ONLY**
- 9:30 Selecting/Saving Report Criteria
- 10:00 Selecting/Saving Reports
- 10:45 BREAK
- 11:00 Report Filters and Secondary Criteria
- 12:30 LUNCH
- 1:15 Exporting to Excel (Laser Excel – data sets less than 10,000 records)
- 1:45 Exporting to Excel (Custom Excel – data sets greater than 10,000 records)
- 2:15 Annual Report/Module 4 Reporting
- 2:45 Wrap Up