**How to Add Clients to the TC Agendas in Central Reach: For Providers**

1. First, accept the ‘invite’ to be connected to your region(s)/team(s) contact in CR (this step will need to be completed 1 time only).
* Click on the Contacts icon and then choose ‘Invite Requests’

 

* Locate your region/team contact (you may have to use the search bar if you have many) then click ‘Accept’.

 

1. Ensure your Region(s)/Team(s) are set as a ‘Favorite’ in your CR account (this step will need to be completed 1 time only).
* Go To Contacts
* Search for your region/team contacts
* Open the contact
* Click the start next to the place for the profile picture

 

**TWO EASY WAYS TO ACCESS AND ADD TO YOUR AGENDA**

OPTION #1:

* When you login, your favorites will be on your dashboard. Click the Region/Team TC Agenda in your favorites.
* Locate Notes & Forms in your widgets and click on the agenda you wish to add to (each agenda is ONE week).
* You will add clients to the sections called ‘Other Agenda Additions 1-5’ or ‘Other Agenda Additions 6-10.’
* Add ALL requested information for each client.
* Click SAVE at the bottom of the page. **NEVER CLICK LOCK AND SAVE!!**

OPTION #2:

* Go to your files module in CR
* Locate the agenda you want to add to (text search by region/team, date of agenda, or words in the title) and click on the title to open it.
* Click on ‘Note & Form’ at the top of the screen.



* You will add clients to the sections called ‘Other Agenda Additions 1-5’ or ‘Other Agenda Additions 6-10.’
* Add ALL requested information for each client.
* Click SAVE at the bottom of the page. **NEVER CLICK LOCK AND SAVE!!**