

How to Record Anonymous Visits & Household Members



Link2Feed

Anonymous visits are for individual household visits only—not for bulk entries at the end of the day. They are available only for standard, non-appointment programs. Appointment-based programs will not have this option.

1

In your location's **Case Management Dashboard**, navigate to the '**Search for Clients By...**' widget and record an anonymous visit by clicking the **'+New Anonymous Visit'** button underneath the search bar.

The **'+New Anonymous Visit'** button is available only if two conditions are met:



1. A Network Administrator has enabled **Anonymous Visits** in the Intake Options settings.
2. Your user account has the **Anonymous Intake permission** enabled in your user settings.

2

Choose a program and enter the required information, including the number of adults and children in the household, then click **Save to record the visit** or **Cancel to exit**.

After saving, a green **"Success – Visit record successfully added"** message will appear at the top right, and you will return to the Client Search tab.



Anonymous visits are available only for standard, non-appointment programs. Appointment-based programs will not have this option.

Success
Visit recorded successfully

An **anonymous household member** can be added when creating a new client or editing an existing client in the Personal tab.

1

Start by creating a new client OR access an existing clients profile tab. At the bottom of the Personal tab, click **'+Add'** button in the **Household Members** section. Within the **Household Member Info** pop-up box that appears, enter any partial info if needed, and click **'+Add Anonymous Member'**. Repeat to add additional members, then click Save Changes or **Save & Next**.



Add any partial information you'd like to include **before** selecting **'+Add Anonymous Member'**, as details cannot be edited once the member is created.

+ Add



The **Anonymous Household Members** feature can be enabled at the agency level if your Network has set it to On – Optional. In the agency's **Intake Options** section, set Anonymous Household Members to On.

You can update the profile later to complete required fields and convert an Anonymous Household Member into a full client. Once converted, filled-in info appears in reports, incomplete fields show as Unknown, and the client is no longer labeled Anonymous.

Have additional inquiries?

Ask the chat bot! Just click the message icon on the bottom left corner of the screen.

For other questions, please reach out to your manager for further assistance!