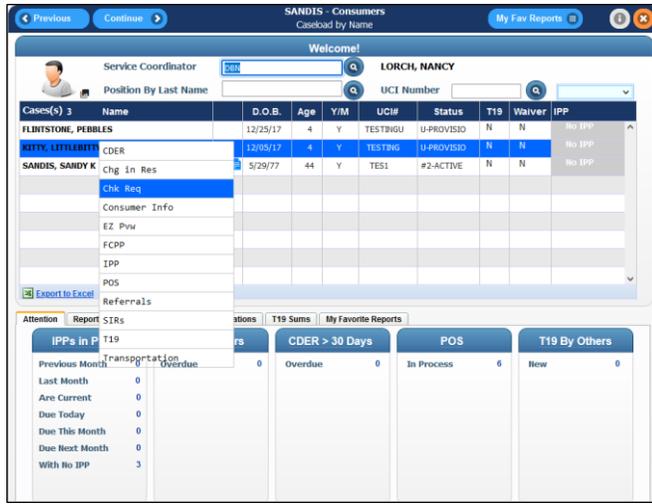


# Trust Check

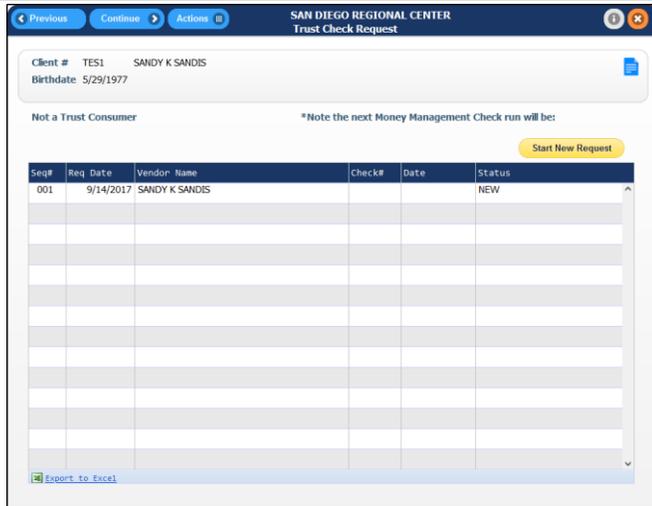
Regional Centers can assume Client Representative Payee for some of their clients. The **Client Check Request** feature in SANDIS7 can be used as a formal way to make requests from the trust or benefits staff in addition to keeping a running history of those requests.

From the Welcome Screen, right-click on the desired client to work with and select **Chk Req** from the pop-up menu that appears.



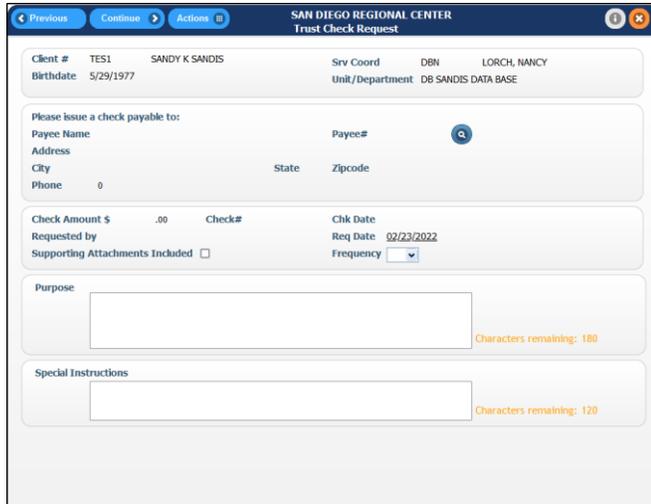
If available, a list of previous requests will be present. If there are no previous requests, the screen will be blank.

Click on the **Start New Request** button to create a **Trust Check Request**.

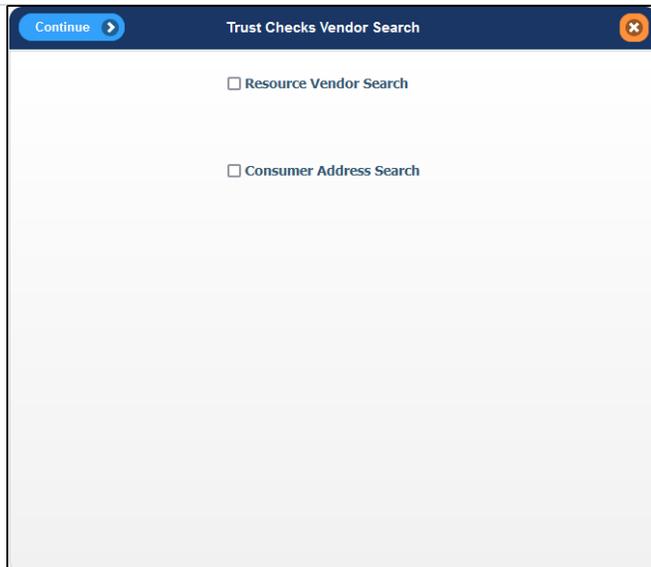


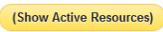
Fill the blank areas as needed.

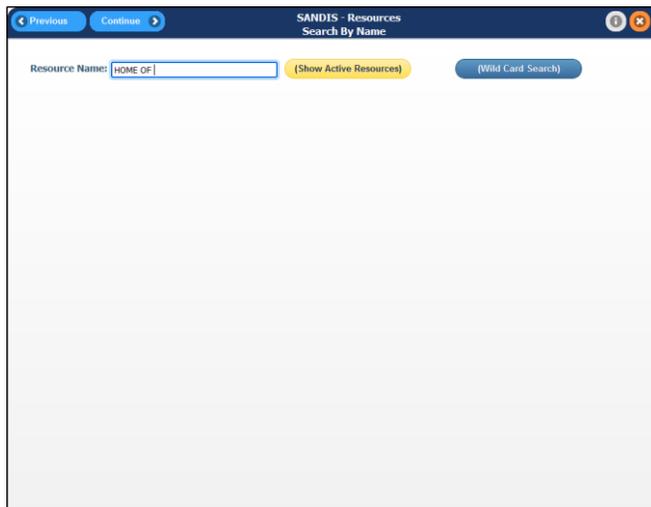
*Depending on the type of access granted to your profile, certain fields may not be able to be filled in.*



Under Payee#, there is a search feature to fill in the Payee Name, Address and Phone automatically prefill based on existing records. Click on the  icon to be directed to the **Trust Checks Vendor Search** screen.



**Resource Vendor Search** will provide a directory of vendors in SANDIS7. Type in the desired resource name, click on  to filter between **all resources** and **active resources only**. Once the resource name is entered, press  or Enter on the keyboard.



A list of results will appear. Right-click the desired record and choose **Select** to have the resource's information loaded into the **Trust Check Request** fields.

Res#	Name	City	Phone	SC_Loc
PV1657	HOME OF GUIDING HANDS 1908 FRIENDSHIP DRIVE	EL CAJON	(619) 938-2850	CAC S
PV2153	HOME OF GUIDING HANDS 1908 FRIENDSHIP DR	EL CAJON	(619) 938-2850	CAC S
PQ2124	HOME OF GUIDING HANDS	LAKESIDE	0	U
P72849	HOME OF GUIDING HANDS 10025 LOS RANCHITOS RD	LAKESIDE	0	U
PV1657	HOME OF GUIDING HANDS 1908 FRIENDSHIP DRIVE	EL CAJON	(619) 938-2850	U
PV2153	HOME OF GUIDING HANDS 1908 FRIENDSHIP DR	EL CAJON	(619) 938-2850	U

\* = Closed Resource

If searching by Consumer, a list of addresses recorded on the Client's UCI record will be displayed. Right-click the selected address and choose **Select**.

Address	Applies to
102 UPDOWN ROAD	CONSUMER LGL MAIL BUS MAIL LIST OTHER(TH
5644 SDRG WAY	DAD MOM EMG MAIL LIST EMG OTHER(NEIGHBOR)

*If an address is not displayed on this screen, it will be required to add it to the client's record.*

Ensure that the correct information was transferred over and ensure that the **Frequency** field is set to the correct issue frequency. The **Purpose** field must be completed and the **Special Instruction** field is available to provide instructions to fiscal staff, if necessary.

Client # TES1 SANDY K SANDIS Srv Coord DBN LORCH, NANCY  
 Birthdate 5/29/1977 Unk/Department DB SANDIS DATA BASE

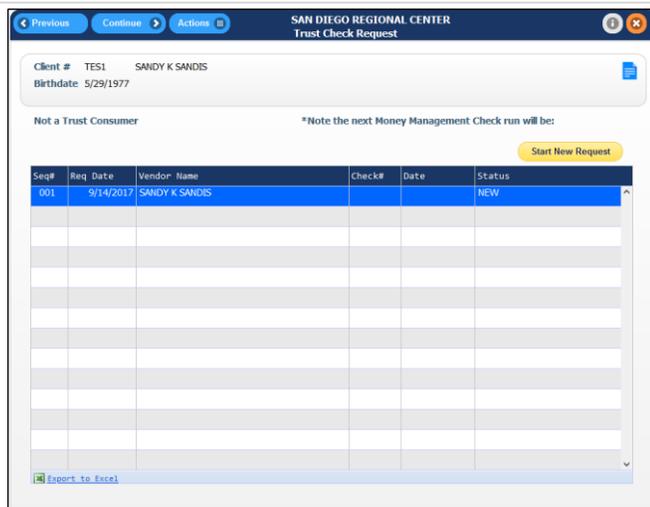
Please issue a check payable to:  
 Payee Name SANDY K SANDIS Payee# TES1  
 Address 5644 SDRG WAY  
 City SAN DIEGO State CA Zipcode 921235555  
 Phone (858) 888-3343

Check Amount \$ 100.00 Check# Chk Date  
 Requested by SANDIEPZ/ASTUDG Req Date 09/14/2017  
 Supporting Attachments Included  Frequency  Monthly  ONE TIME  
 One Time  
 Semi-monthly  
 Weekly

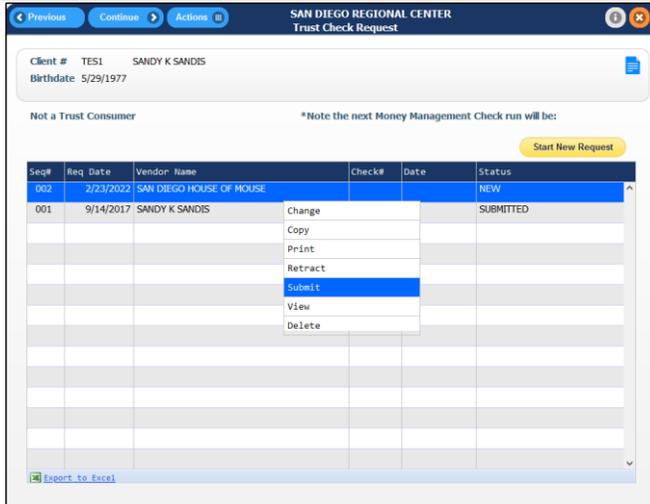
Purpose WHEELCHAIR TO IMPROVE CLIENT'S MANEUVER Characters remaining: 133

Special Instructions Characters remaining: 120

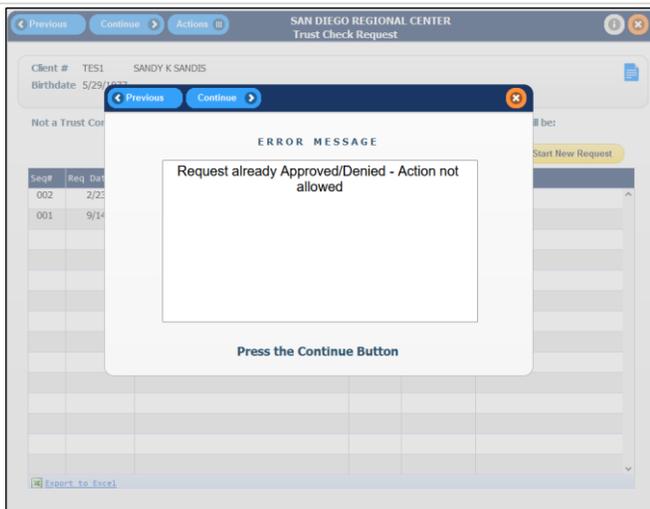
To save completed work without exiting, press **Save** ✓. Once all fields are completed and the check request is ready to be submitted, press **Continue** ▶ to be taken back to the Trust Check Request history screen for your UCI.



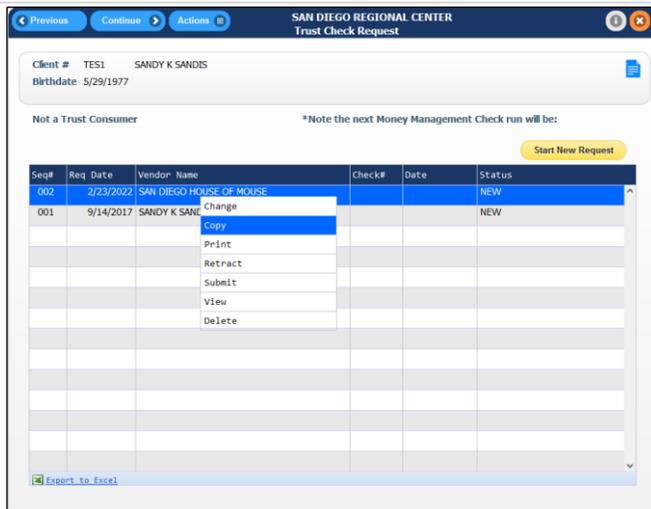
Right-click the newly created check request and select **Submit**. An email to your supervisor will be created and you will see the status of the request change to **Submitted**.



If more changes are needed, you are able to select **Retract** to revert the status to New. Please note that only records with status **New** can be edited. If a change is needed, retract the request and set it back to **New** Status.

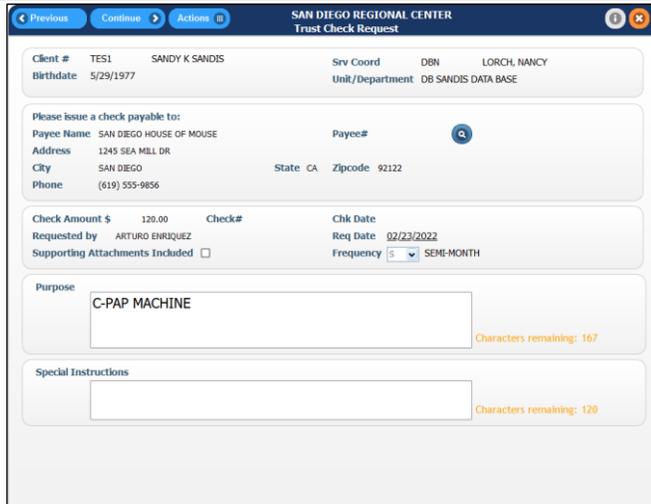


A previous request can be copied if necessary. In the Trust Check Request's screen, right-click a record and choose **Copy**. This will copy the record's Payee name, address, phone along with the check amount and purpose/special instructions fields into the new request.



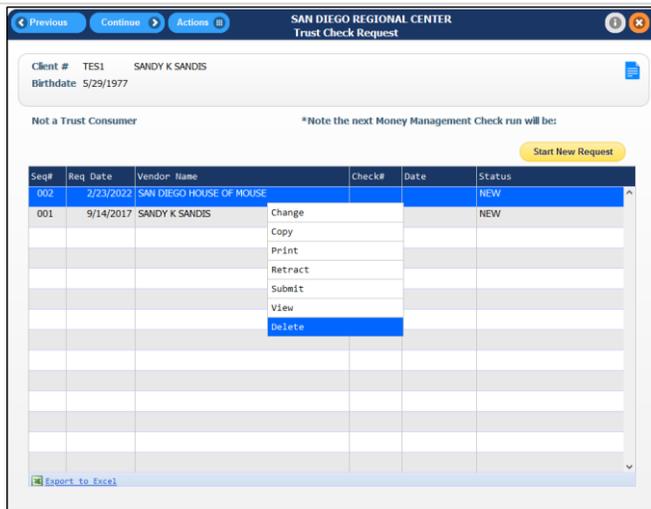
A record can be viewed in **View Only** mode by right-clicking the record and selecting **View**. Note that the fields will not be editable.

*It is recommended to view requests in this method until they are ready to be worked on.*

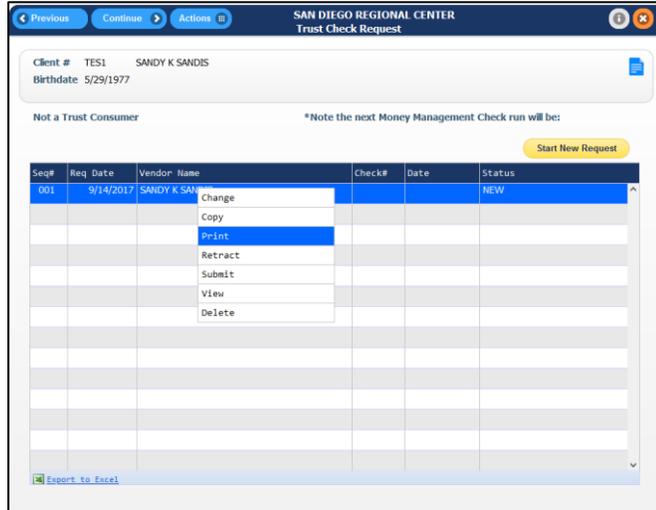


To delete a New request, simply right-click the record and select **Delete**.

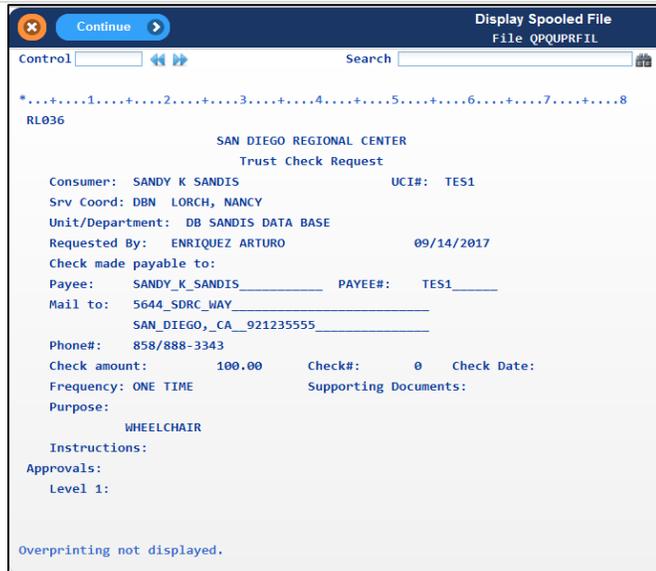
To view all deleted requests, select the **Actions** icon and choose **Show Deleted**. A deleted request can be brought back by right-clicking the record and selecting **Reactivate**.



To Print a copy of your request, right-click the record and select **Print**.



The request will be displayed, ensure it is accurate prior to continuing.



There are navigation buttons displayed on the bottom right corner of the screen.

When ready, press the  or the  button.

A pop-up will display to print or email the report. Press the  button next to the desired option.

