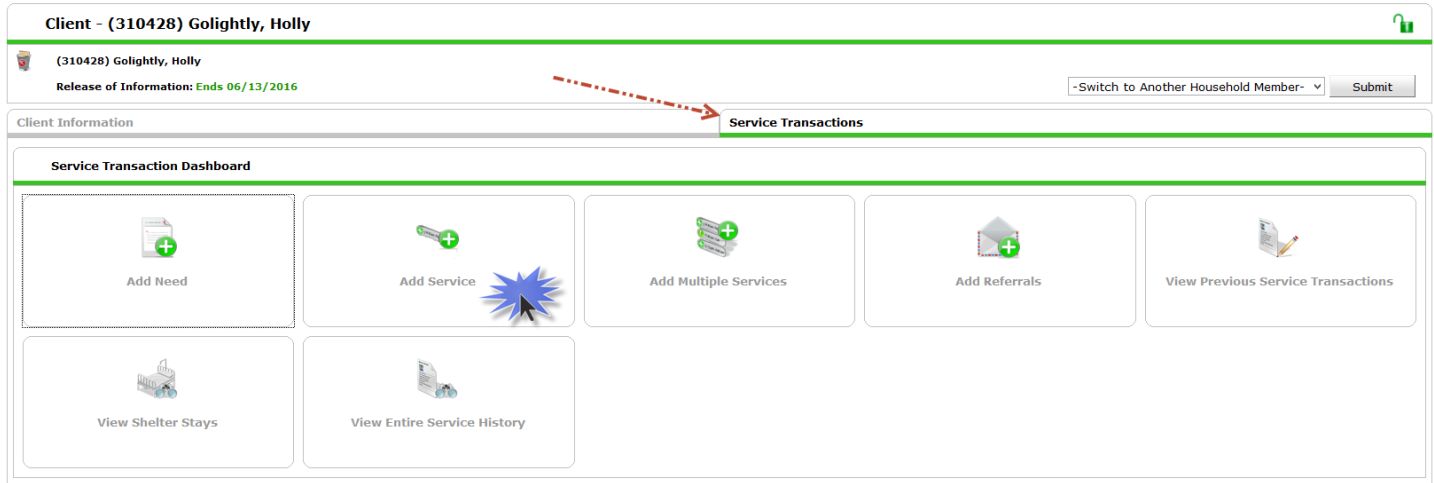


# Adding Services

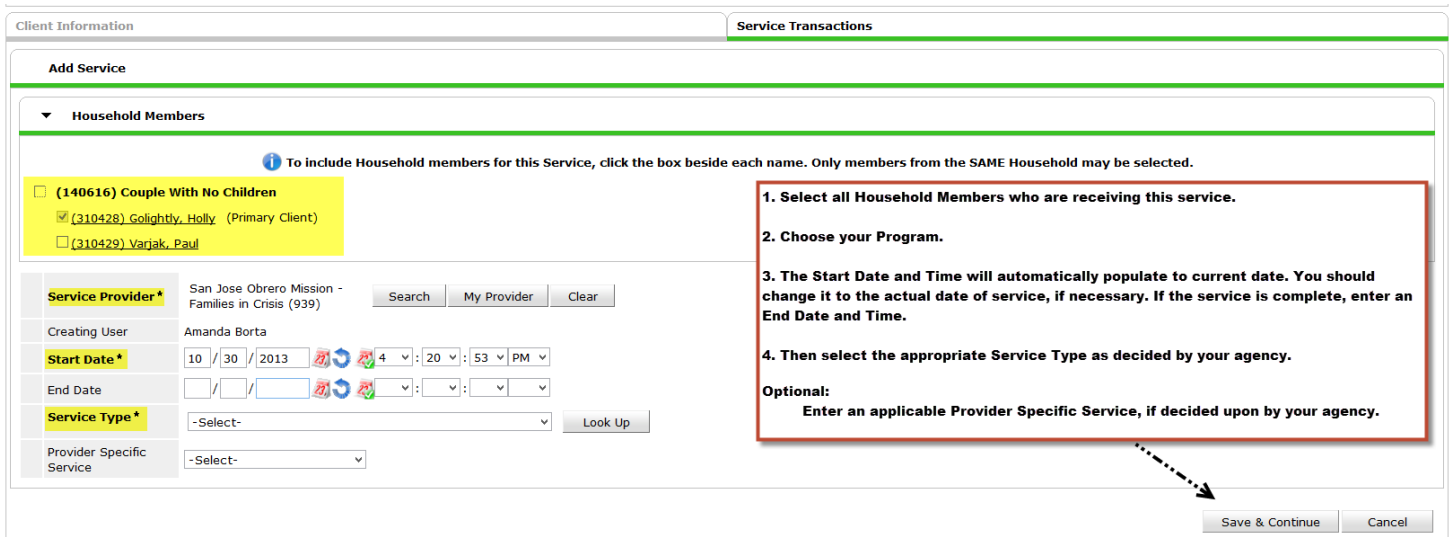
Note: Rapid Re-housing service transactions require additional steps. See program-specific workflow for details.

Go to your client's record by searching for name or client ID.

Once you are in the client record, go to the **Service Transactions Tab**.



Click on **Add Service**, even when entering a service referral. The system will automatically create a corresponding need for each service, so it will not be necessary to select Add Need.



Enter the necessary information and click **Save & Continue**.

Continue to Page 2

Additional sections will appear. Most of these sections are comprised of optional data collection elements. **You are only required to enter the Need Status, located at the bottom of the screen.**

**Service Provider\*** San Jose Obrero Mission - Families in Crisis (939)

Creating User: Amanda Borta

**Start Date\*** 10 / 30 / 2013 4 : 20 : 53 PM

**End Date** 10 / 30 / 2013 5 : 33 : 51 PM

**Service Type\*** In Person Support Groups (PN-8050.3300)

Provider Specific Service: House Meeting

Service Location: -Select-

Service Staff: -Select-

Service Notes:

**Optional:**

1. Enter any service notes that may be helpful.

2. Enter Service Costs (if applicable):

**Number of Units (ex: 1 = 1 transit card given)**  
**Cost per Unit (ex: 1 transit card = \$5)**  
**The Total Cost of Units will auto-calculate based on number of units.**

**Service Costs**

Number of Units:

Unit Type: -Select-

Cost per Unit: \$

Total Cost of Units: \$

**Support Documentation**

Date Added	Name	Description	Type
Add Support Documentation			

**Follow Up Information**

Projected Follow Up Date:

Follow Up User: Chicago Alliance to End Homelessness (1)  Search My Provider Clear

Follow Up Made: -Select-

Completed Follow Up Date:

**Need Information**

**Need Status\*** Closed and Met

Outcome of Need: -Select-

If Need is Not Met, Reason: -Select-

**Optional:**

You can also choose to upload support documentation related to this particular service or enter Follow-Up Information.

**Required:**

The Need Status will automatically populate as Identified. Choose the appropriate status of the service: **Identified, In Progress, Closed and Met, Closed and Unmet**

This status can be updated later as needed.

Save Save & Exit Exit

Remember, you may access your services at any time from the **Service Transactions tab**. Click on View Entire Service History to see all services entered for your client. **You may edit or update by clicking the pencil to the left.**

Client Information Service Transactions **Entire Service History**

Needs Services Referrals Shelter Stays

**All Service Transactions**

Select Dates: Start Date: -Select- End Date: -Select- Search

Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
Need	09/10/2013	Chicago Alliance to End Homelessness -	Rent Payment Assistance	Closed and Met	
Service	09/10/2013	Chicago Alliance to End Homelessness -	Rent Payment Assistance		