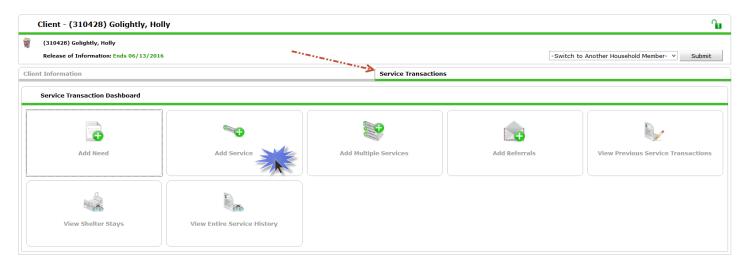
Adding Services

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.

Client Information			5	Service Transactions
Add Service				
▼ Household Men	nbers			
	() To includ	le Household members for this Service, clic	ck the box beside e	ach name. Only members from the SAME Household may be selected.
 (140616) Couple 1 (310428) Golighti (310429) Varjak, 	With No Children Iy, Holly (Primary Client)			1. Select all Household Members who are receiving this service. 2. Choose your Program.
Service Provider*	San Jose Obrero Mission - Families in Crisis (939)	Search My Provider Clear		 The Start Date and Time will automatically populate to current date. You should change it to the actual date of service, if necessary. If the service is complete, enter an End Date and Time.
Creating User Start Date*	Amanda Borta	2 20 v : 53 v PM v		4. Then select the appropriate Service Type as decided by your agency.
End Date Service Type *	//) 🤯 🔹: 🔹 👻 🗸 🗸	Up	Optional: Enter an applicable Provider Specific Service, if decided upon by your agency.
Provider Specific Service	-Select-	×		······
				Save & Continue Cancel

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 ¥	C C	Optional:	
Service Type *	In Person Support Groups (PN-8050.3300)		. Enter any service notes that may be helpful.	
Provider Specific Service	House Meeting v	2	2. Enter Service Costs (if applicable):	
Service Location	-Select- ¥	-··- , /	Number of Units (ex: 1 = 1 transit card given)	
Service Staff	-Select- V		Cost per Unit (ex: 1 transit card = \$5) The Total Cost of Units will auto-calculate based on number of units.	
Service Notes				_
Number of Units		, 14		
Number of offics				
Unit Type	-Select- v			
	-Select- v \$\$			
Unit Type Cost per Unit	\$ \$	Description		
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Unit Type Cost per Unit Total Cost of Units Support Documen Date Added V Nam	\$ \$ tation e ation	Description	Optional: You can also choose to upload support documentation related to this particular service or enter Follow-Up Information.	
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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**.

ent Information			Service Transactio	ons /	-		
Needs		ces (Referrals	Shelter Stays	Entire Ser	Entire Service History	
All Service Transaction	-						_
-Select-	Start I	Date / 20 つ 20	End Date	A 🔿 R		Search	
Transaction	Type Date	Provider		Туре	Need Statu	us / Outcome N	Need Goa
🧪 😒 💼 🧋 Need	09/10/2013	Chicago Alliance to End Homelessness	5 -	Rent Paymen	t Assistance Closed and	Met	
As Service	09/10/2013	Chicago Alliance to End Homelessness	a -	Rent Paymen	t Assistance		