

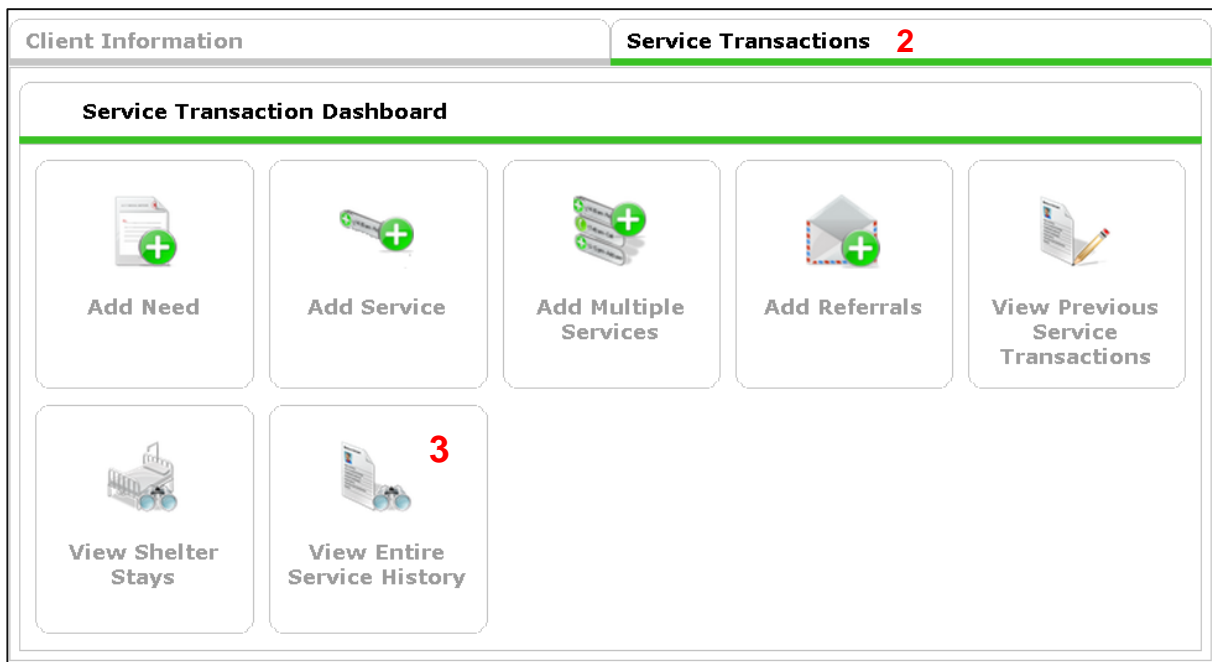
How to Add a Service

The service functionality can be used to easily track what services a client has received from your agency over time. This document will show you:

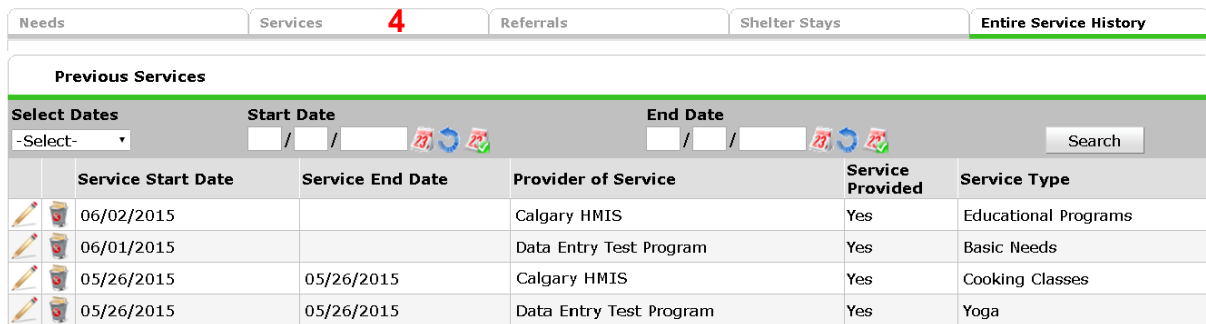
1. How to view what services your client has received
2. How to add a service
3. How to add multiple services at a time

How to View What Services Your Client has Received

1. Open the clients profile
2. Click Service Transaction tab
3. Click View Entire Service History



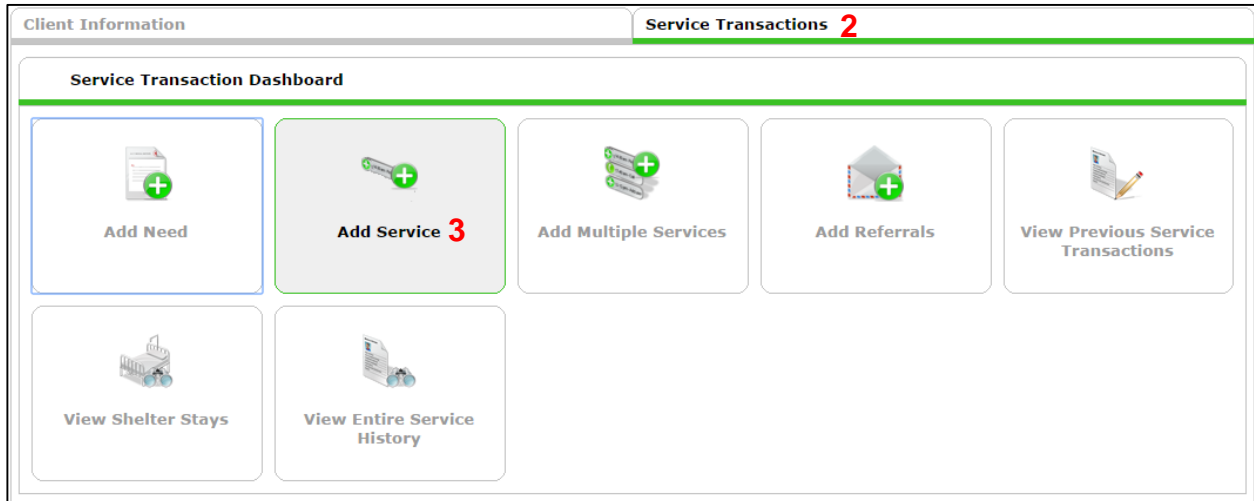
4. Click on the Services tab – you will see a list of all the services that have been provided to date.



Previous Services					
Select Dates	Start Date		End Date		
-Select-					Search
	Service Start Date	Service End Date	Provider of Service	Service Provided	Service Type
	06/02/2015		Calgary HMIS	Yes	Educational Programs
	06/01/2015		Data Entry Test Program	Yes	Basic Needs
	05/26/2015	05/26/2015	Calgary HMIS	Yes	Cooking Classes
	05/26/2015	05/26/2015	Data Entry Test Program	Yes	Yoga

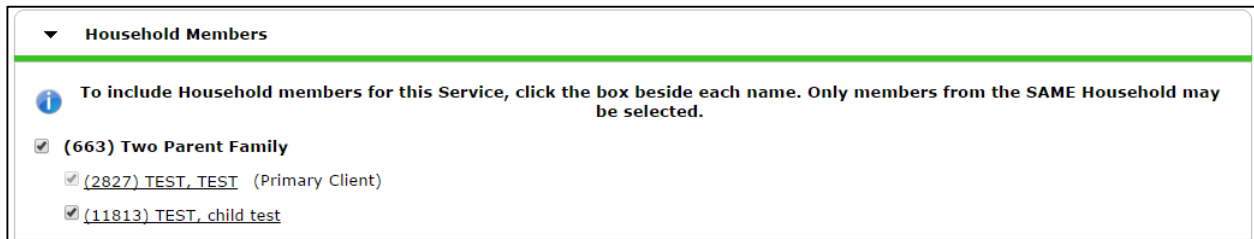
How to Add a Service

1. Open the clients profile
2. Click the Service Transaction tab
3. Click Add Service



On the next window:

4. *If applicable* - Check off Household Members if they are also receiving the service



5. Fill in the prompts
 - a. **Service Provider:** Default to your program – Ensure it is the program which is providing the service
 - b. **Creating User:** Default to you
 - c. **Start Date:** When is the service commencing
 - d. **End Date:** Is there an applicable end date
 - e. **Service Type:** If the clients need is not listed in the drop down menu, choose 'look up' to make use of the Canadian AIRS Taxonomy
 - f. **Provider Specific Service:** There may be a custom drop down list that your agency has created
6. Click Submit

a	Service Provider *	Calgary HMIS (1)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
b	Creating User	Britany Ardelli			
c	Start Date *	09 / 25 / 2014	<input type="button" value="Calendar"/>	<input type="button" value="Refresh"/>	<input type="button" value="Save"/>
d	End Date	/ /	<input type="button" value="Calendar"/>	<input type="button" value="Refresh"/>	<input type="button" value="Save"/>
e	Service Type *	-Select-	<input type="button" value="Look Up"/>		
f	Provider Specific Service	-Select-			

Additional options will appear. These sections are **optional** and do not need to be filled in to track a service.

- a. Service Costs – How much does it cost your agency to provide this service
- b. Funding Source – Which funder is paying for this service?
- c. Support Documentation – Attach forms, certificates, etc.
- d. Projected Follow Up Date – This will appear on your Home Page

a	Service Costs
Number of Units	<input type="text"/>
Unit Type	-Select-
Cost per Unit	\$ <input type="text"/>
Total Cost of Units	\$ <input type="text"/>
Apply Funds for Service	
b	Funding Sources
Source	
Amount	
<input type="button" value="Add Funding Source"/>	<input type="button" value="Calculate"/> Total: \$0.00
c	Support Documentation
<input type="button" value="Add Support Documentation"/>	No matches.
d	Follow Up Information
Projected Follow Up Date	/ / <input type="button" value="Calendar"/> <input type="button" value="Refresh"/> <input type="button" value="Save"/>
Follow Up User	Calgary HMIS (1) <input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
Follow Up Made	-Select-
Completed Follow Up Date	/ / <input type="button" value="Calendar"/> <input type="button" value="Refresh"/> <input type="button" value="Save"/>

7. Fill in the Need Information

A need will automatically be created for each service you add. Ensure to adjust the Need Status and Outcome of Need before clicking Save & Exit.

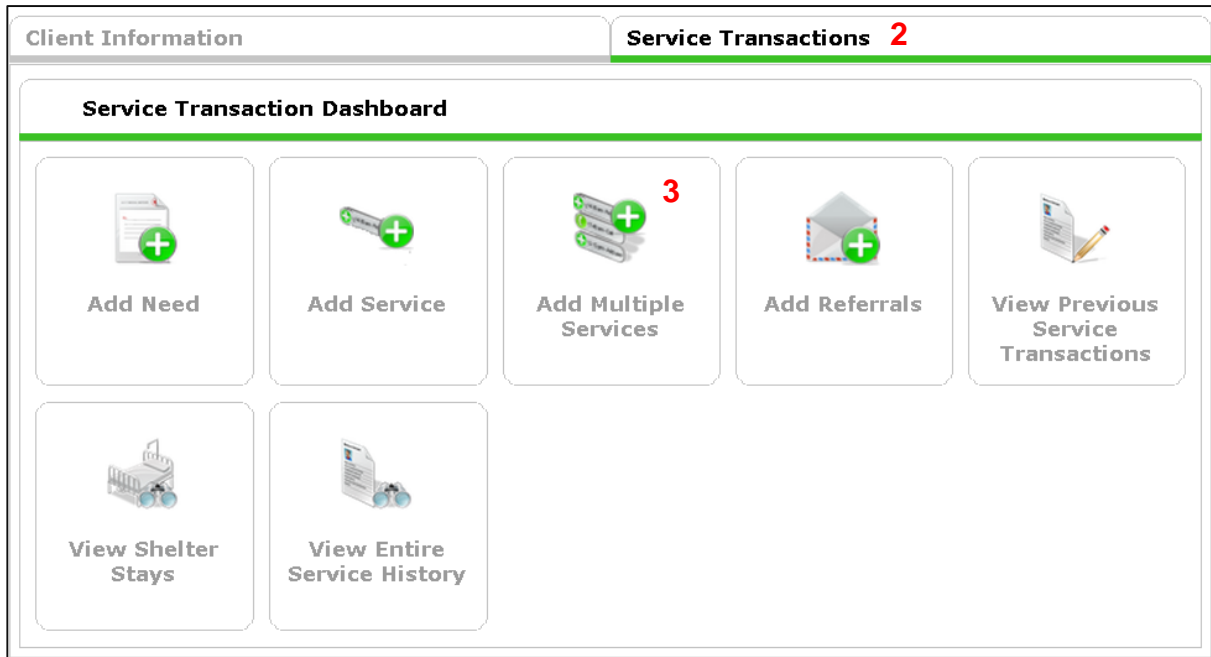
Example: If you have already provided the service to the client, your need should resemble the below:

Need Information	
Need Status*	Closed ▾
Outcome of Need	Fully Met ▾
If Need is Not Met, Reason	-Select- ▾

8. Click Save & Exit

How to Add Multiple Services

1. Open the clients profile
2. Click the Service Transaction tab
3. Click Add Multiple Services

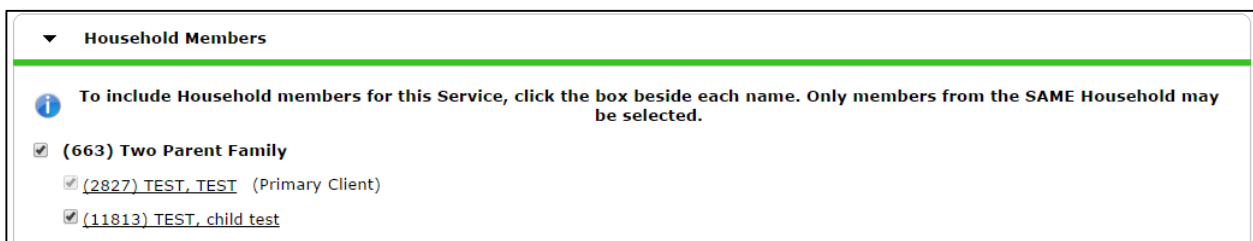


The screenshot shows the 'Service Transactions' tab selected, with a red '2' indicating the step. Below the tab is the 'Service Transaction Dashboard' containing the following buttons:

- Add Need
- Add Service
- Add Multiple Services (with a red '3' next to it)
- Add Referrals
- View Previous Service Transactions
- View Shelter Stays
- View Entire Service History

On the next window:

4. *If applicable* - Check off Household Members if they are also receiving the service



The screenshot shows the 'Household Members' section with the following content:

Household Members

1 To include Household members for this Service, click the box beside each name. Only members from the SAME Household may be selected.

- (663) Two Parent Family
 - (2827) TEST, TEST (Primary Client)
 - (11813) TEST, child test

5. In the Service List area, complete the following fields for every service:

- a. **Number of Services:** This number is typically one, but this field allows the user to add more than one service of the selected type. As an example, this may be used to add three meals in a day without having to add three separate transactions.

- b. **Service Type** from the pick list, or use the default service that is initially populated in the field. OR **Select a Provider Specific Service** from the pick list. The Provider Specific Service is chosen from a customized list created for the current provider.
- c. **Start Date and End Date** for the Service in mm/dd/yyyy format.
- d. **Need Information**: select a Need Status, Outcome, and If Not Met, Reason from the pick list. A need will automatically be created for each service you add. Ensure to adjust the Need Status and Outcome of Need before clicking Save & Exit.

Multiple Services

1 Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.

Service Provider* Homebase Team 1 - The Alex (29) ▾

Service List

Number of Services **Need Status** Identified ▾

Number of Services *	a	<input type="text" value="1"/>
Start Date*	c	06 / 02 / 2015 <input type="button" value="23"/> <input type="button" value="23"/> <input type="button" value="23"/> 2 ▾ : 26 ▾ : 03 ▾ PM ▾
End Date		06 / 02 / 2015 <input type="button" value="23"/> <input type="button" value="23"/> <input type="button" value="23"/> 2 ▾ : 26 ▾ : 03 ▾ PM ▾
Service Type	b	-Select- ▾
Provider Specific Service		-Select- ▾

Need Information

Need Status*	d	Identified ▾
Outcome of Need		-Select- ▾
If Need is Not Met, Reason		-Select- ▾

6 Remove **7** Clear

8 Add Another

9 Save & Exit **10** Cancel

6. Click **Remove** to remove a transaction from the screen. Click Remove All to remove all transactions from the screen.
7. Click **Clear** to reset the fields for the transaction. Click Clear All to clear all transactions on the screen.
8. Click **Add Another** to add a service transaction to the screen.
9. Click **Save & Exit** to save the multiple services. A list of the client's Services will display on the Previous Services screen.
10. Click **Cancel** to return to the previous screen without retaining the multiple services.