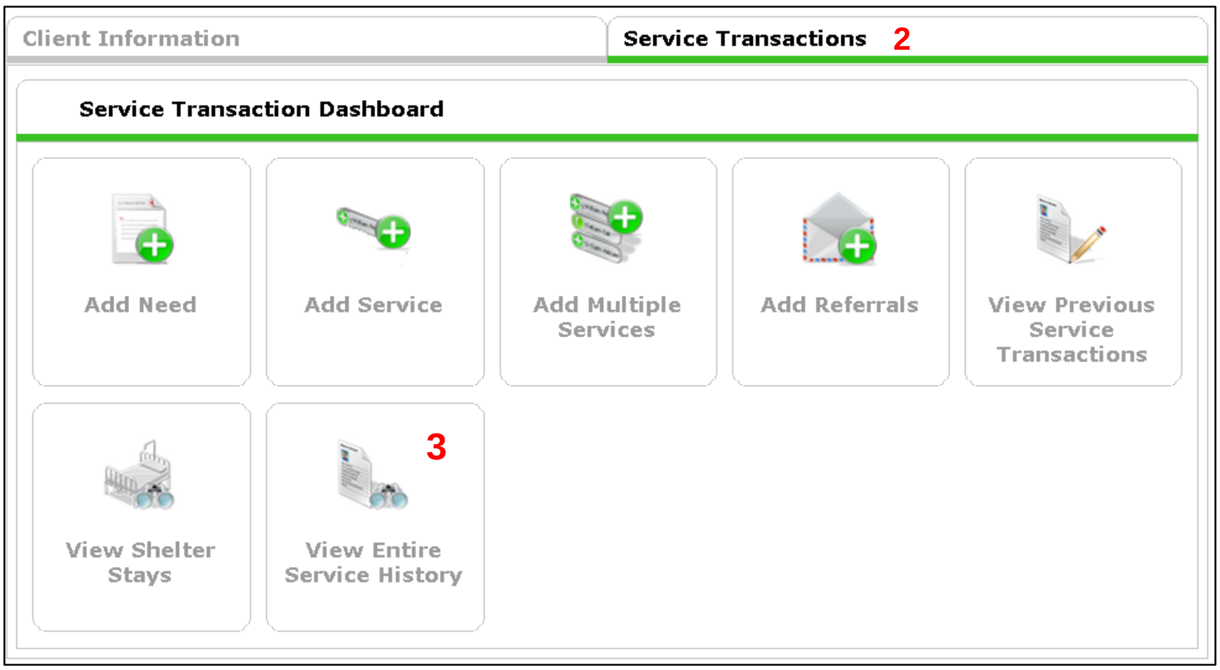
How to Add a Service

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:

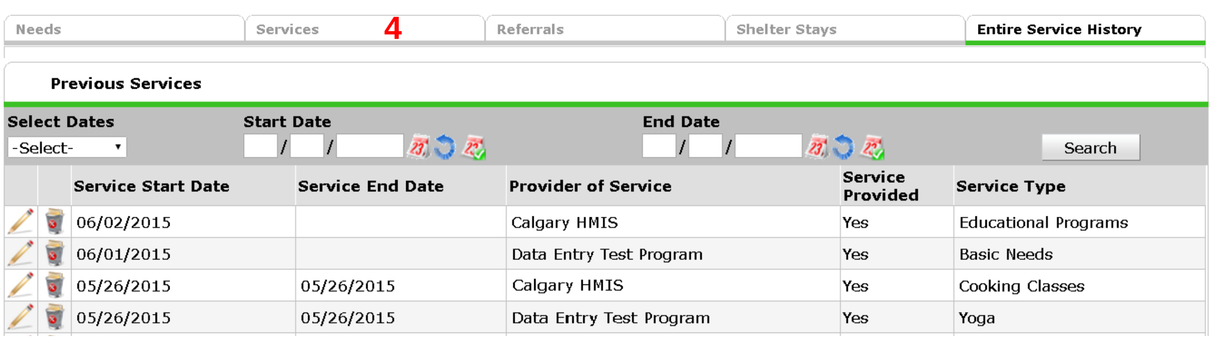
1. How to view what services your client has received
2. How to add a service
3. How to add multiple services at a time

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



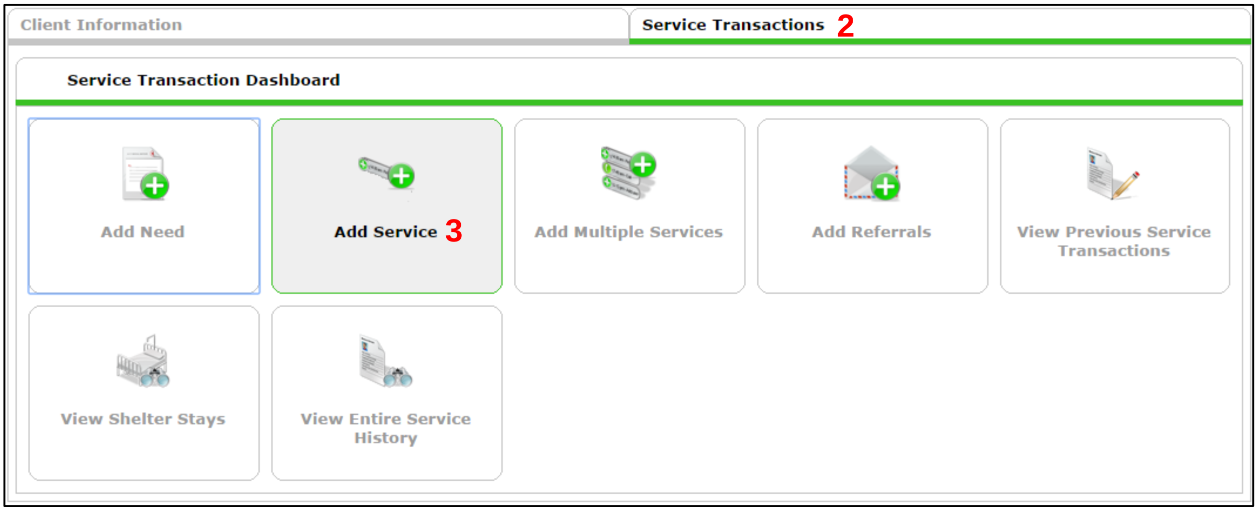
4. Click on the Services tab – you will see a list of all the services that have been provided to date.



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

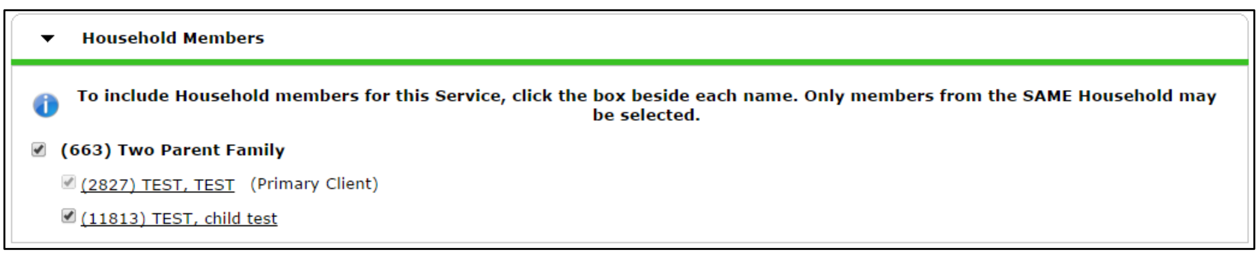
How to Add a Service

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



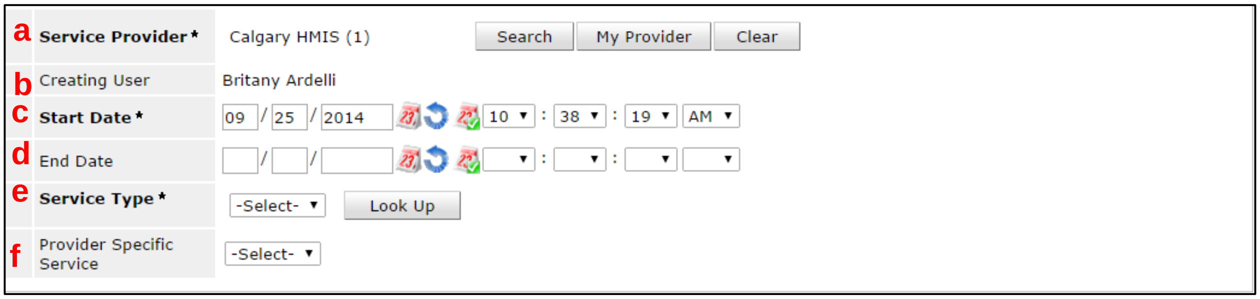
On the next window:

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



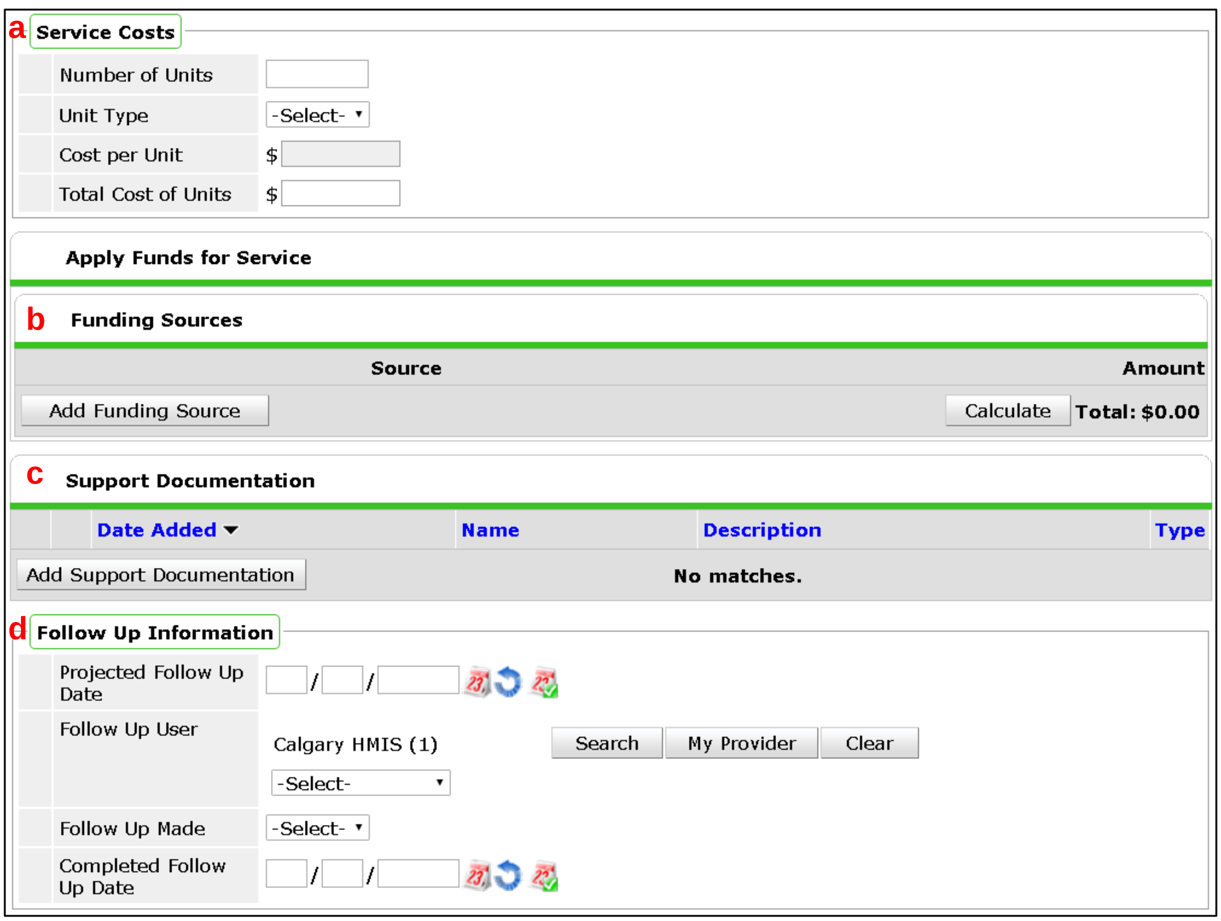
5. Fill in the prompts
   a. **Service Provider**: Default to your program – Ensure it is the program which is providing the service
   b. **Creating User**: Default to you
   c. **Start Date:** When is the service commencing
   d. **End Date:** Is there an applicable end date
   e. **Service Type**: 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



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

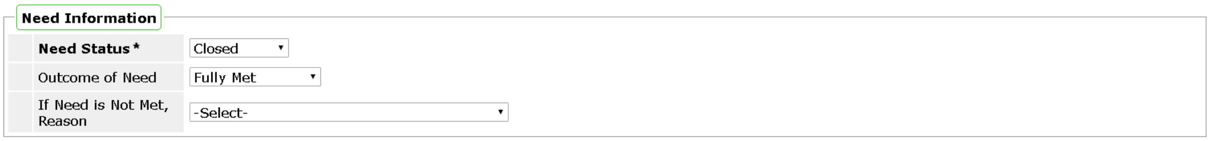
a. Service Costs – How much does it cost your agency to provide this service
b. Funding Source – Which funder is paying for this service?
c. Support Documentation – Attach forms, certificates, etc.
d. Projected Follow Up Date – This will appear on your Home Page



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:



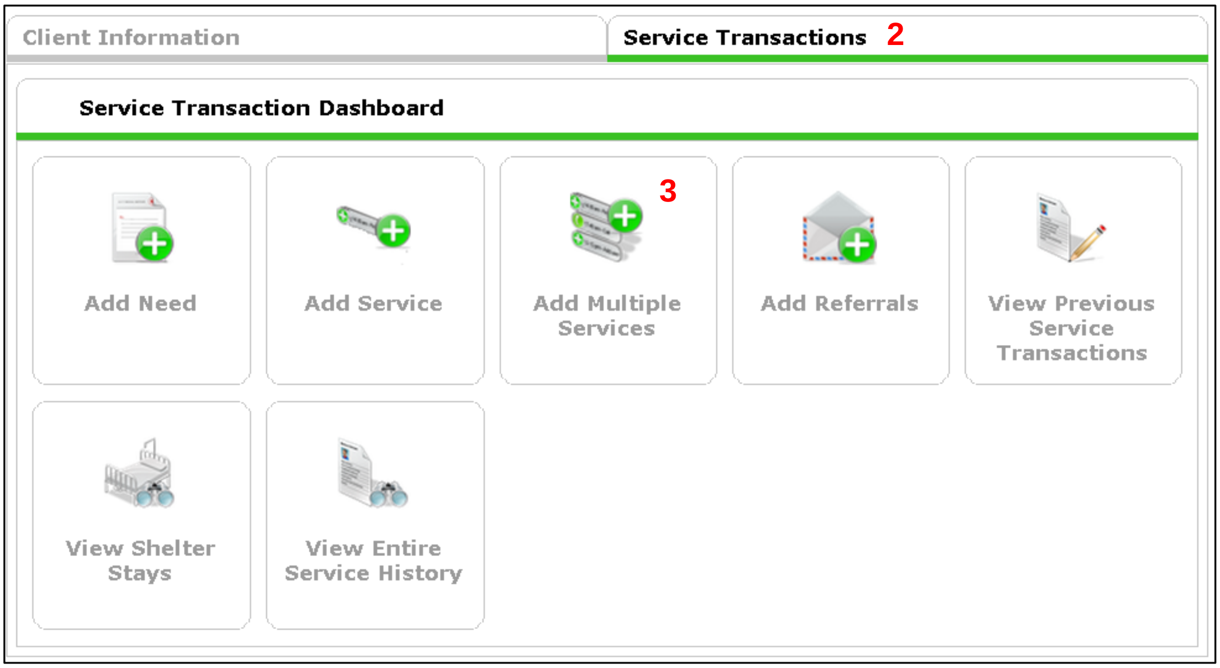
Need Information

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

8. Click Save & Exit

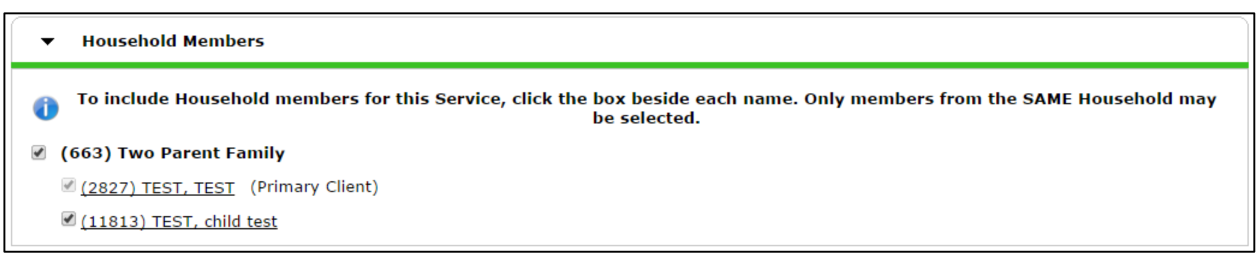
How to Add Multiple Services

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



On the next window:

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



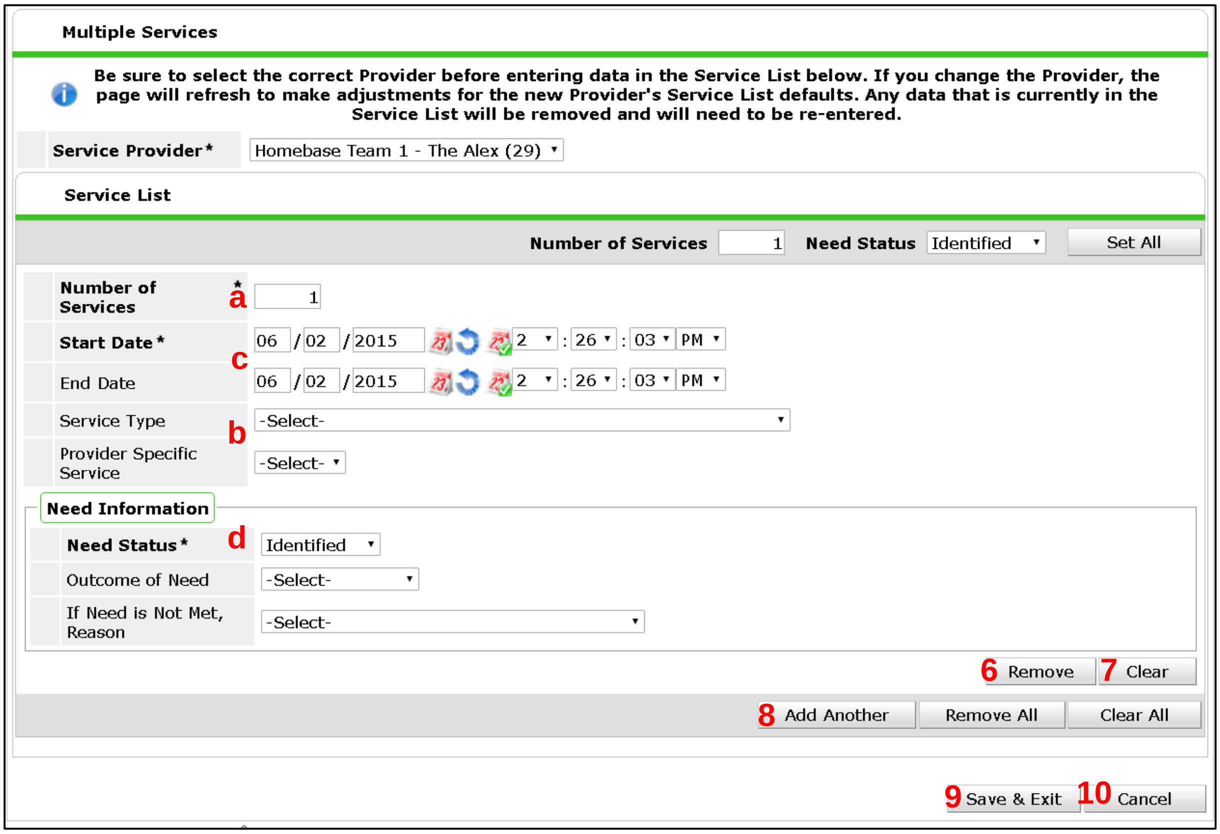
5. In the Service List area, complete the following fields for every service:

   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.



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.