Service Items

ServicePoint allows you to add service items for **Case Plans**.

1. Locate the Goal to which you would like to add service item. (See Figure 1-26)

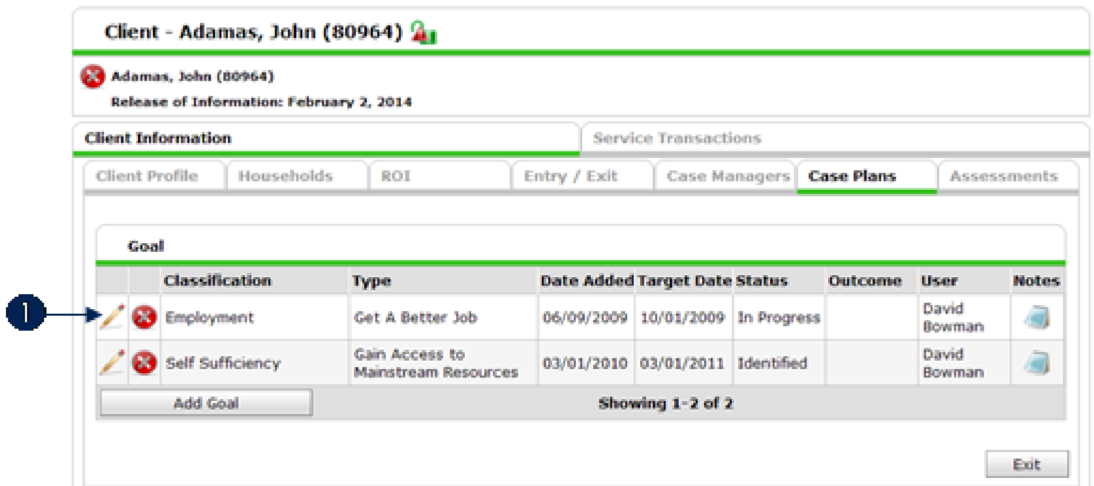


Figure 1-26

2. Click the **Edit** icon next to the **Goal**. **(1)** The **Goal** will open. Scroll down to see the **Service Items** (See Figure 1-27)

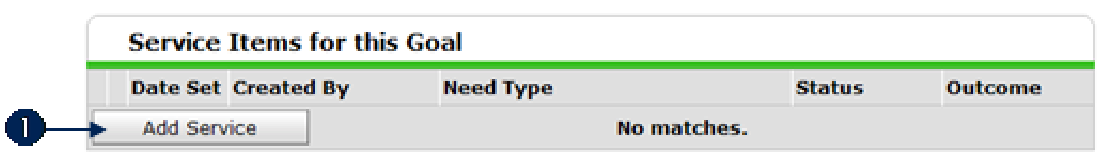
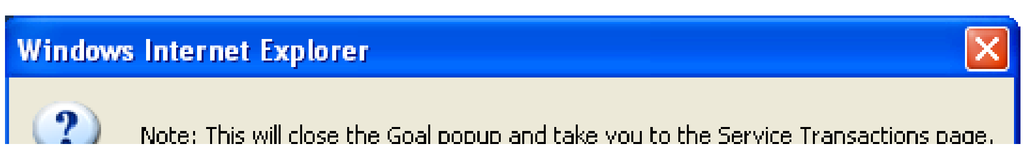


Figure 1-27

3. Click **Add Service**. **(1)** Since you will be taken to another screen, a window will appear to make sure you want to proceed. (See Figure 1-28)



4. Click **OK**. The screen will refresh to the **Service Transactions** screen. (See Figure 1-29)

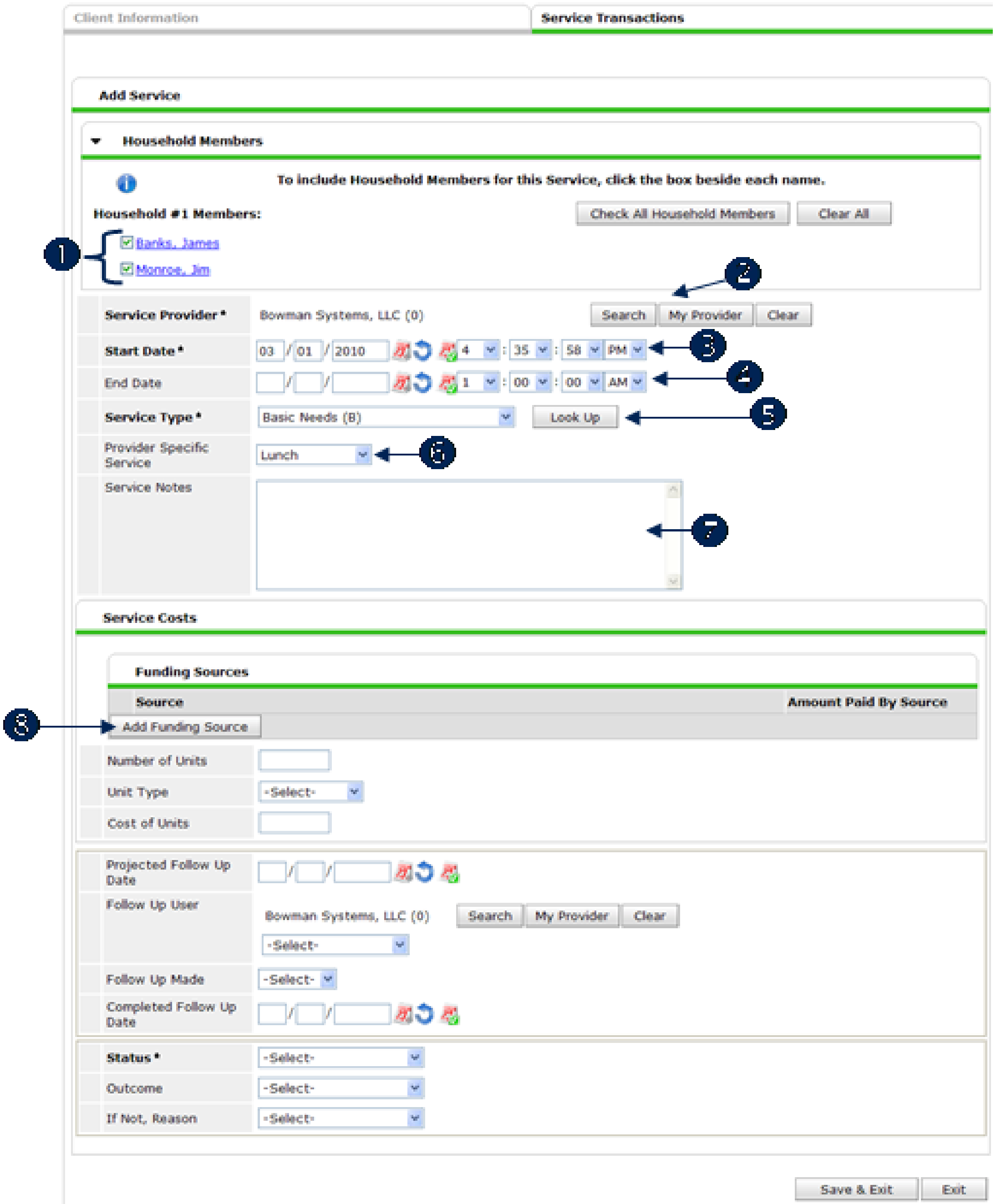


Figure 1-29

5. The *Service Transactions* window appears. Bold fields with an asterisk are required fields. Complete the upper section first:

   a: Add household members if necessary and available. **(1)**

   b: By default the service provider associated with this service item is selected. Change the provider if necessary by clicking **Search** or **My Provider**. **(2)**

   c: Enter the **Start Date** or use one of the auto-fill icons. **(3)** The date must be in the mm/dd/yyyy format.

   d: If this service transaction already has an end date—perhaps you are just now entering the entire transaction—then enter the End Date. **(4)**

   e: Choose the **Service Type** from the available quick picklist or click **Look Up** so search using AIRS taxonomy. **(5)**

> **Note:** *The service items in this picklist and the next one are set by the system administrator in the Admin Providers area.*

f: Choose the **Provider Specific Service** from the available options in the picklist. **(6)**

g: Type any **Service Notes** in the available field. **(7)**

6. Click **Add Funding Source** if you would like to track and report on a source. **(8)** (See Figure 1-30)

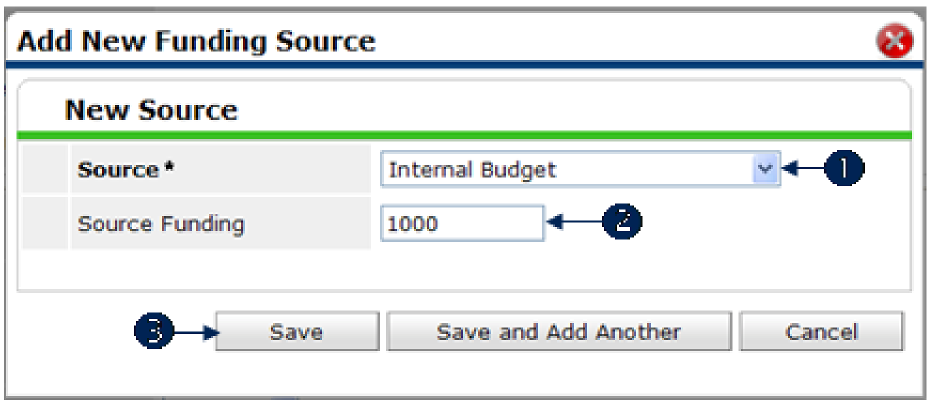


Figure 1-30

7. Enter the **Source** from the picklist, which is required. **(1)**
8. Enter the amount, which is not required. **(2)**
9. Click **Save** or **Save and Add Another** if you have additional funding sources. **(3)** The funding source will be added to the **Service Costs** section. (See Figure 1-31)

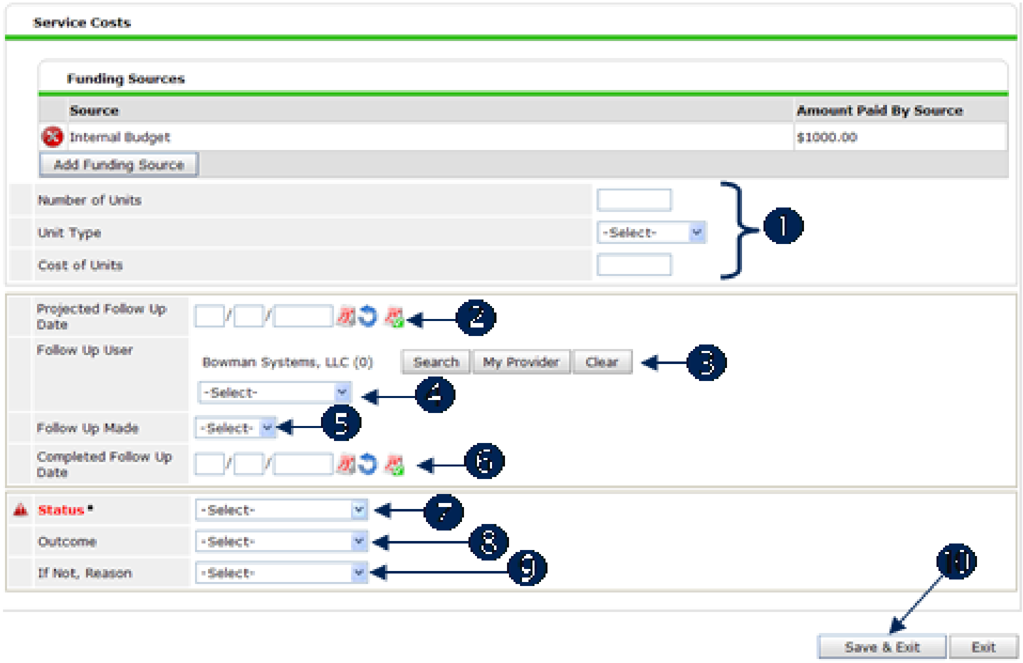


Figure 1-31

a: The information in the next section is controlled by the system administrator in the Admin Providers section. In this example, enter and select unit information. **(1)**

b: Enter the **Projected Follow Up Date** or use one of the auto-fill date icons. **(2)**

c: **Follow Up User**: This is the user who is assigned to follow up with the client. A picklist of available users appears based on the provider. Click **My Provider** to select your default provider for which the user list will be associated (or click **Search** to find another provider). **(3)** Select the user from the pick list. **(4)**

d: **Follow Up Made**: Select the status from the picklist. **(5)**

e: **Completed Follow Up Date**: Enter the date the follow-up was completed or select from one of the auto-fill icons. **(6)** The date must be in the mm/dd/yyyy format.

f: Select the **Status** from the available picklist. **(7)** This is a required field.

Note: *The values in this picklist and the following two are set by the system administrator in* Picklist Administration.

g: **Outcome**: Select from the options in the picklist. **(8)**

h: **If Not, Reason**: If there was no outcome, select the reason from the picklist. **(9)** required

i: Click **Save & Exit** to save the service item and return to the **Service Transactions** tab of the **Client Information** screen.