

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)

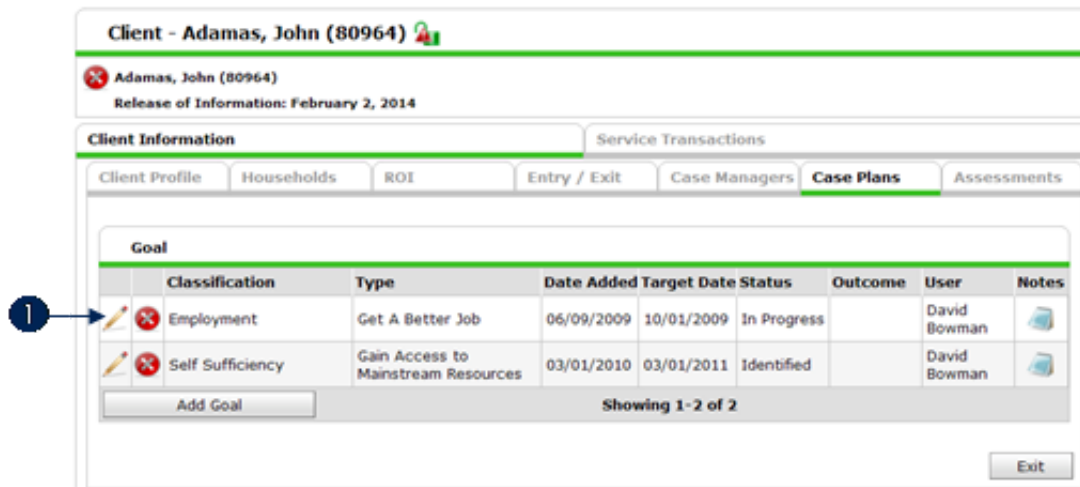


Figure 1-26

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)

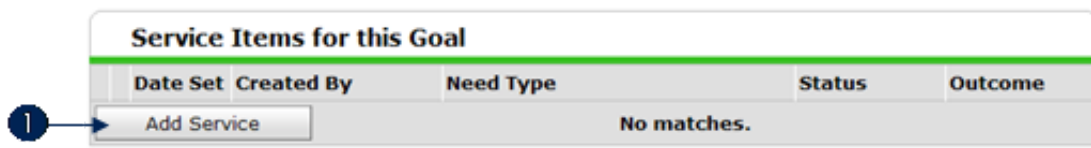
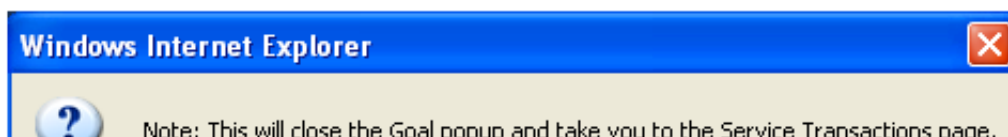


Figure 1-27

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)

The screenshot shows the 'Service Transactions' window. The top section is 'Add Service'. Under 'Household Members', there are two members listed: Barks, James and Monroe, Jim, both with checked boxes. The 'Service Provider' is Bowman Systems, LLC (0). The 'Start Date' is 03/01/2010. The 'End Date' is blank. The 'Service Type' is Basic Needs (B). The 'Provider Specific Service' is Lunch. The 'Service Notes' field is empty. The 'Service Costs' section includes 'Funding Sources' with an 'Add Funding Source' button and fields for 'Number of Units', 'Unit Type', and 'Cost of Units'. Below that are 'Projected Follow Up Date' fields for date, user, and status. The 'Funding Sources' table has columns for 'Source' and 'Amount Paid By Source'. The window has 'Save & Exit' and 'Exit' buttons at the bottom right.

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)

The screenshot shows a dialog box titled "Add New Funding Source". Inside, there is a section titled "New Source" with a green header. Below this header are two input fields. The first is labeled "Source *" and has a dropdown menu with "Internal Budget" selected; a circled "1" points to the dropdown arrow. The second is labeled "Source Funding" and has a text box containing "1000"; a circled "2" points to the text box. At the bottom of the dialog are three buttons: "Save" (with a circled "3" pointing to it), "Save and Add Another", and "Cancel".

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)

The screenshot shows the 'Service Costs' form with the following sections and callouts:

- Funding Sources:** A table with columns 'Source' and 'Amount Paid By Source'. It contains one entry: 'Internal Budget' with a value of '\$1000.00'. Below the table is an 'Add Funding Source' button.
- Unit Information:** Fields for 'Number of Units', 'Unit Type' (a dropdown menu), and 'Cost of Units'. A bracket labeled '1' encompasses these three fields.
- Follow Up Information:**
 - 'Projected Follow Up Date': A date input field with auto-fill icons, labeled '2'.
 - 'Follow Up User': A dropdown menu showing 'Bowman Systems, LLC (0)', 'Search', 'My Provider', and 'Clear' buttons. A callout '3' points to the 'My Provider' button, and '4' points to the dropdown menu.
 - 'Follow Up Made': A dropdown menu labeled '5'.
 - 'Completed Follow Up Date': A date input field with auto-fill icons, labeled '6'.
- Status and Outcome:**
 - 'Status *': A dropdown menu labeled '7'.
 - 'Outcome': A dropdown menu labeled '8'.
 - 'If Not, Reason': A dropdown menu labeled '9'.
- Buttons:** 'Save & Exit' and 'Exit' buttons at the bottom right, with a callout '10' pointing to the 'Save & Exit' button.

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.