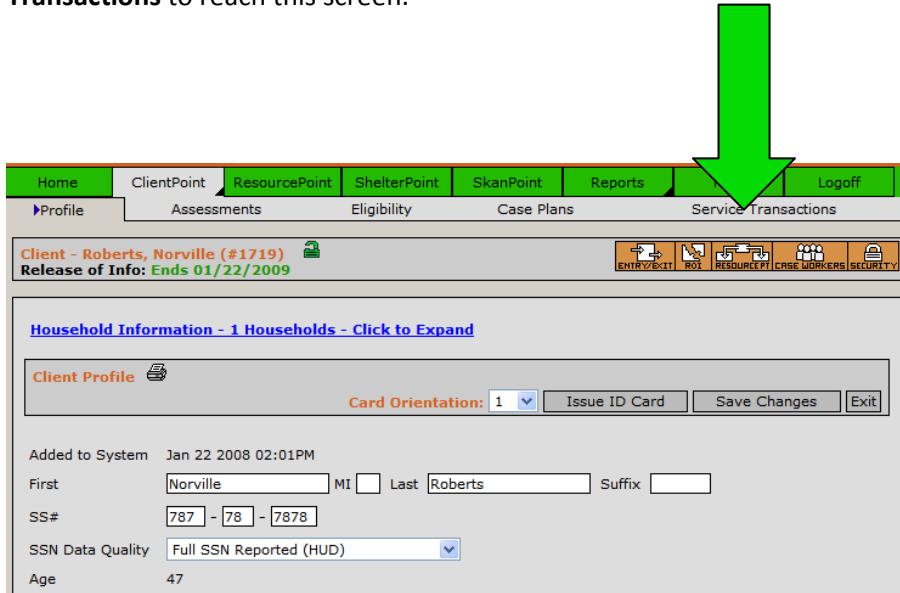


Recording Services, Needs and Referrals

You can record single needs and services, multiple services, unmet needs, and referrals. Select **Service Transactions** to reach this screen.

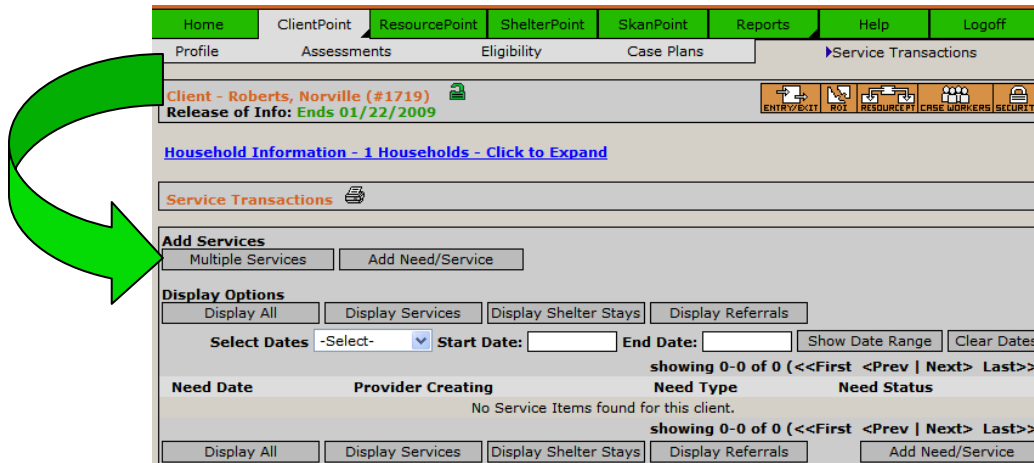


The screenshot shows the top navigation bar with tabs: Home, ClientPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports, and Logoff. Below this is a sub-navigation bar with tabs: Profile, Assessments, Eligibility, Case Plans, and Service Transactions. A large green arrow points down to the Service Transactions tab. The main content area displays client information for "Client - Roberts, Norville (#1719)" with a "Release of Info: Ends 01/22/2009" notice. Below this is a "Household Information - 1 Households - Click to Expand" section. The "Client Profile" section includes a "Card Orientation" dropdown set to "1", and buttons for "Issue ID Card", "Save Changes", and "Exit". The "Added to System" date is "Jan 22 2008 02:01PM". The "First" name is "Norville" and "Last" is "Roberts". The "SS#" is "787 - 78 - 7878". The "SSN Data Quality" is "Full SSN Reported (HUD)". The "Age" is "47".

Recording Multiple Services

Choose Multiple Services to easily record multiple services from one screen.

1. To record more than one service at a time, select **Multiple Services**.



The screenshot shows the "Service Transactions" page for the same client. The "Service Transactions" tab is selected in the sub-navigation bar. The "Add Services" section has two buttons: "Multiple Services" and "Add Need/Service". A large green arrow points from the "Multiple Services" button to the left. Below this is the "Display Options" section with buttons for "Display All", "Display Services", "Display Shelter Stays", and "Display Referrals". The "Select Dates" section has a dropdown menu set to "-Select-", "Start Date:" and "End Date:" fields, and buttons for "Show Date Range" and "Clear Dates". The "Need Date" section has a "Provider Creating" dropdown and a "Need Type" dropdown. The "Need Status" section has a "Need Status" dropdown. The "No Service Items found for this client." message is displayed. The "Display All" button is highlighted in the bottom row.

2. Check boxes next to household members who are receiving the same services.
3. For **Provider**, select the **Program** the client is entering.
4. Complete fields:
 - **# of Services** defaults to 1; this can be changed if necessary. For example, if you want to record the actual number of times a client used the phone, you would record that here.
 - Select the **Service** your program is providing from the drop down menu.
 - Select the **Start Date** to record when the client began receiving services.
 - **End Date** defaults to today's date. If you know a specific End Date, enter it. If you leave the End Date blank it will only record services provided on the Start Date.
 - Optional: **Source** and **Cost of Service** can be used to track grant sources. It is not required for the APR, but can be used in reports to track cost of providing services.
 - Optional: **# of Units** and **Unit Type** can be used to describe what was provided. For example, you could record that 5 bus passes (# of Units) were in a transportation book (Unit Type).
 - Optional: **Cost of Unit** can be used to record the cost of unit. For example, the bus pass cost \$.50.
 - **Status** records whether needs were met, not met, or referred. While Status is not necessary for the APR, if your agency and/or program wants to run a Needs Report, Status must be selected.
 - Identified = Need Referred to another agency
 - In Progress = Ongoing Service your agency is providing
 - Closed = Your agency met the need

Household members

To include household members in these services, click on the box beside each name. Note: Only members from the same household may be selected.

Household #1 Members:

*Roberts, Bertie

*Roberts, Robert

Multiple Services

Warning: Be sure to select the correct provider before entering data in the Service List. If you change the Provider, the page will refresh to make adjustments for the new provider and its defaults. Any data that is currently in the Service List will be removed and will not be saved.

Provider ABC APR Program (#107)

Service List

of Services 1 Service Case/Care Management

Start Date 01/24/2008 12 : 53 PM End Date 01/24/2008 12 : 53 PM

Source 1 -Select- Cost of Service 1

Source 2 -Select- Cost of Service 2

of Units Unit Type -Select- Cost of Unit

Status Closed

Cancel Clear

Services

Add Another Cancel All Clear All Save And Exit Exit

5. Select **Add Another** to continue adding services; record the services provided in each box.
6. When done, click **Save &**

Exit.

Multiple Services

Warning: 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 reentered.

Provider

Service List

# of Services	<input type="text" value="1"/>	Service	<input type="text" value="Case/Care Management"/>				
Start Date	<input type="text" value="01/24/2008"/>	:	<input type="text" value="12"/> : <input type="text" value="53"/> <input type="text" value="PM"/>	End Date	<input type="text" value="01/24/2008"/>	:	<input type="text" value="12"/> : <input type="text" value="53"/> <input type="text" value="PM"/>
Source 1	<input type="text" value="-Select-"/>			Cost of Service 1	<input type="text"/>		
Source 2	<input type="text" value="-Select-"/>			Cost of Service 2	<input type="text"/>		
# of Units	<input type="text"/>	Unit Type	<input type="text" value="-Select-"/>	Cost of Unit	<input type="text"/>		
Status	<input type="text" value="Closed"/>						
<input type="button" value="Cancel"/>	<input type="button" value="Clear"/>						

# of Services	<input type="text" value="1"/>	Service	<input type="text" value="Clothing"/>				
Start Date	<input type="text" value="01/24/2008"/>	:	<input type="text" value="12"/> : <input type="text" value="53"/> <input type="text" value="PM"/>	End Date	<input type="text" value="01/24/2008"/>	:	<input type="text" value="12"/> : <input type="text" value="53"/> <input type="text" value="PM"/>
Source 1	<input type="text" value="-Select-"/>			Cost of Service 1	<input type="text"/>		
Source 2	<input type="text" value="-Select-"/>			Cost of Service 2	<input type="text"/>		
# of Units	<input type="text"/>	Unit Type	<input type="text" value="-Select-"/>	Cost of Unit	<input type="text"/>		
Status	<input type="text" value="Closed"/>						
<input type="button" value="Cancel"/>	<input type="button" value="Clear"/>						

# of Services	<input type="text" value="1"/>	Service	<input type="text" value="Personal/Grooming Supplies"/>				
Start Date	<input type="text" value="01/24/2008"/>	:	<input type="text" value="12"/> : <input type="text" value="53"/> <input type="text" value="PM"/>	End Date	<input type="text" value="01/24/2008"/>	:	<input type="text" value="12"/> : <input type="text" value="53"/> <input type="text" value="PM"/>
Source 1	<input type="text" value="-Select-"/>			Cost of Service 1	<input type="text"/>		
Source 2	<input type="text" value="-Select-"/>			Cost of Service 2	<input type="text"/>		
# of Units	<input type="text"/>	Unit Type	<input type="text" value="-Select-"/>	Cost of Unit	<input type="text"/>		
Status	<input type="text" value="Closed"/>						
<input type="button" value="Cancel"/>	<input type="button" value="Clear"/>						

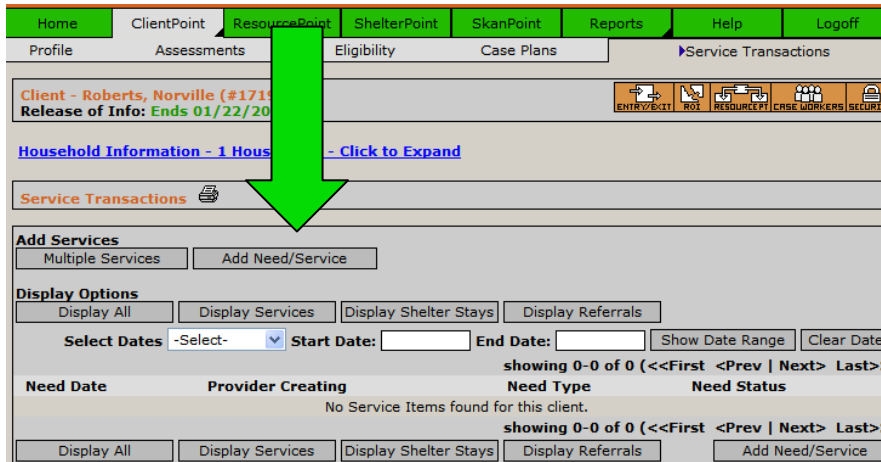
Each time you click **Add Another**, a new box will appear to record services.

Services

Recording a Single Service

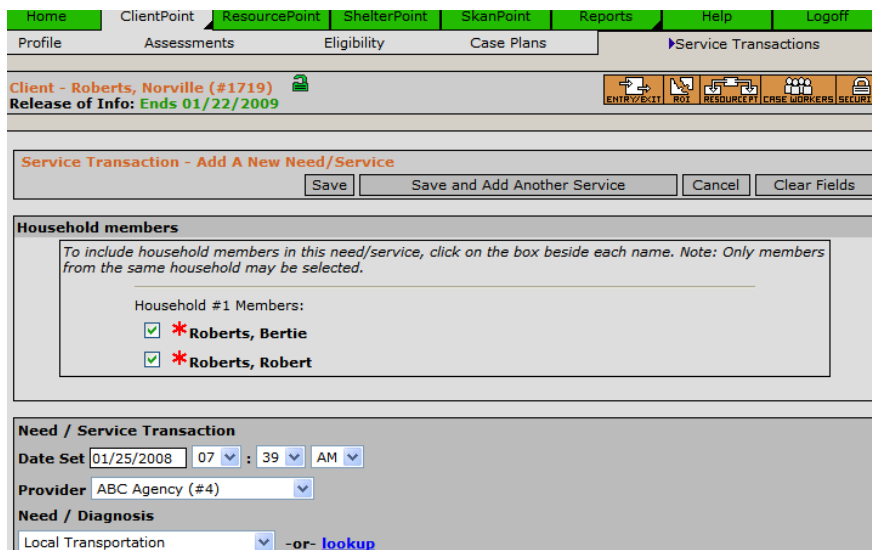
Record a single need and/or service in order to make referrals, track referrals and unmet needs, and to be able to add non-confidential notes about the need. Also use this function to record **Unmet Needs**. For Unmet Needs, only complete the fields in the **Needs** section (Leave **Services** blank) and click **Save**.

1. Select **Add Need/Service**.



The screenshot shows the top navigation bar with tabs: Home, ClientPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports, Help, and Logoff. Below the navigation bar are tabs for Profile, Assessments, Eligibility, Case Plans, and Service Transactions. The main content area displays client information for 'Roberts, Norville (#1719)' with a release of info ending on 01/22/2009. A section titled 'Household Information - 1 Household' has a 'Click to Expand' link. Below this is the 'Service Transactions' section, which includes an 'Add Services' sub-section with a button for 'Add Need/Service'. There are also 'Display Options' and 'Select Dates' sections.

2. Check boxes next to household members who have the same need and are receiving the same service.



The screenshot shows the 'Service Transaction - Add A New Need/Service' form. It includes a 'Save' button, a 'Save and Add Another Service' button, a 'Cancel' button, and a 'Clear Fields' button. The 'Household members' section contains a note: 'To include household members in this need/service, click on the box beside each name. Note: Only members from the same household may be selected.' Below the note, under 'Household #1 Members:', there are two entries: 'Roberts, Bertie' and 'Roberts, Robert', each with a checked checkbox. The 'Need / Service Transaction' section includes fields for 'Date Set' (01/25/2008 07:39 AM), 'Provider' (ABC Agency (#4)), and 'Need / Diagnosis' (Local Transportation).

3. The screen is split between **Need** information and **Service** information. Remembering that the *Agency diagnoses the Need* and the *Program provides the Service*, complete the fields:

Need / Service Transaction

Date Set 01/25/2008 07 : 39 AM

Provider ABC Agency (#4)

Need / Diagnosis

Local Transportation -or- [lookup](#)

Local Transportation

Need

Financial Amount Notes about Need

Service

Service Provider ABC APR Program (#107)

Start Date 01/25/2008 07 : 39 AM End Date : :

Provider-specific Service -Select-

Service Type -Select Service from Quicklist-
-or- [lookup](#) -or- [Same As Need](#)

Local Transportation

Source 1 -Select- Cost Of Service 1

Source 2 -Select- Cost Of Service 2

of Units Unit Type -Select- Cost of Units

Service Followup Date Actual Followup Date Followup Made -Select-

Agency Diagnoses Need

Program Provides Service

- **Date Set** should be the day the need was diagnosed.
- **Provider** is the Agency (Agency Diagnoses the Need).
- For **Need/Diagnosis**, select the client's need from the drop-down menu.
- Optional: **Financial Amount** is for your agency's tracking needs.
- Optional: **Notes about Need** allows you to write non-confidential notes about your client's needs. Depending on the client's level of consent, these notes may be viewed by other agencies.
- **Service Provider** is the program that is providing the service.
- Select the **Start Date** to record when the client began receiving services.
- **End Date** defaults to today's date. If you know a specific End Date, enter it.
- Optional: **Provider Specific Service** is if your agency provides a special service that is not in the AIRS taxonomy.
- Select **Service Type** from the drop down menu, or click [lookup](#) to search for a service in the AIRS taxonomy. You can click [Same As Need](#) to automatically fill in the same service as the need that was diagnosed.
- Optional: **Service Notes** allows you to write non-confidential notes about the service.
- Optional: **Source** and **Cost of Service** can be used to track grant sources. It is not required for the APR, but can be used in reports to track cost of providing services.
- Optional: **# of Units** and **Unit Type** can be used to describe what was provided. For example, you could record that 5 bus passes (# of Units) were in a transportation book (Unit Type).
- Optional: **Cost of Unit** can be used to record the cost of unit. For example, the bus pass cost \$.50.
- Optional: Record a date to follow up with the client in **Service Followup Date**.

- Optional: Record the **Actual Followup Date**.
- Optional: Select whether a **Followup** was **Made**.

4. When all necessary fields are complete, click **Save**.

Making a Referral

Record Referrals from the **Add Need/Service** page. To make a referral, record the **Needs**, but leave the **Service** information blank.

1. Select **Referral Date**.

Referral

Referral Date: 01/25/2008

Check this box to notify ServicePoint Providers by Email.

Refer To

Provider #1: Hospitality House-Asheville (#202) -or- lookup , bed_avail
 Hospitality House-Asheville (#202) 202 Clear

Provider #2: -Select- -or- lookup , bed_avail
 Clear

Provider #3: -Select- -or- lookup , bed_avail
 Clear

Provider #4: -Select- -or- lookup , bed_avail
 Clear

Provider #5: -Select- -or- lookup , bed_avail
 Clear

Projected Followup Date:

Status and Outcome

Status: In Progress Outcome: Service Pending If Not Met, Reason: -Select-

Service Transaction - Add A New Need/Service

Save Save and Add Another Service Cancel Clear Fields

2. Do not use *Check this box to notify ServicePoint Providers by Email*.

3. Select referring agency in **Provider** boxes.

4. Optional: Enter a **Projected Followup Date**.

5. Optional: **Status** records whether needs were met, not met, or referred. While Status is not necessary for the APR, if your agency and/or program wants to run a Needs Report, Status must be selected.

- Identified = Need Referred to another agency
- In Progress = Ongoing Service your agency is providing
- Closed = Your agency met the need

6. Optional: **Outcome**

- Service Pending
- Fully Met
- Partially Met
- Not Met

7. Optional: **If Not Met, Reason**

- All Services Full
- Client Not Eligible
- Client Refused Service
- Service Does Not Exist
- Service Not Accessible

Viewing Services Provided

You can view Needs Diagnosed, Services Provided, Unmet Needs, Referrals, and Shelter Stays from the **Service Transactions** page. Select one of the following options: **Display All, Display Needs, Display Services, Display Shelter Stays, or Display Referrals.**

Display All View:

Client - Roberts, Norville (#1719)
Release of Info: Ends 01/22/2009

Household Information - 1 Households - Click to Expand

Service Transactions

Add Services
Multiple Services Add Need/Service

Display Options
Display Needs Display Services Display Shelter Stays Display Referrals

Select Dates -Select- Start Date: End Date: Show Date Range Clear Date

showing 1-3 of 3 (<<First <Prev | Next> Last>

Transaction Type	Date	Provider	Type	Need Status	Need Outcome
Need	01/24/2008	ABC Agency	Case/Care Management	Closed	Fully Met
Service	01/24/2008	ABC APR Program	Case/Care Management		
Need	01/24/2008	ABC Agency	Clothing	Closed	Fully Met
Service	01/24/2008	ABC APR Program	Clothing		
Need	01/24/2008	ABC Agency	Personal/Grooming Supplies	Closed	Fully Met
Service	01/24/2008	ABC APR Program	Personal/Grooming Supplies		

showing 1-3 of 3 (<<First <Prev | Next> Last>)

Display Needs Display Services Display Shelter Stays Display Referrals Add Need/Service

