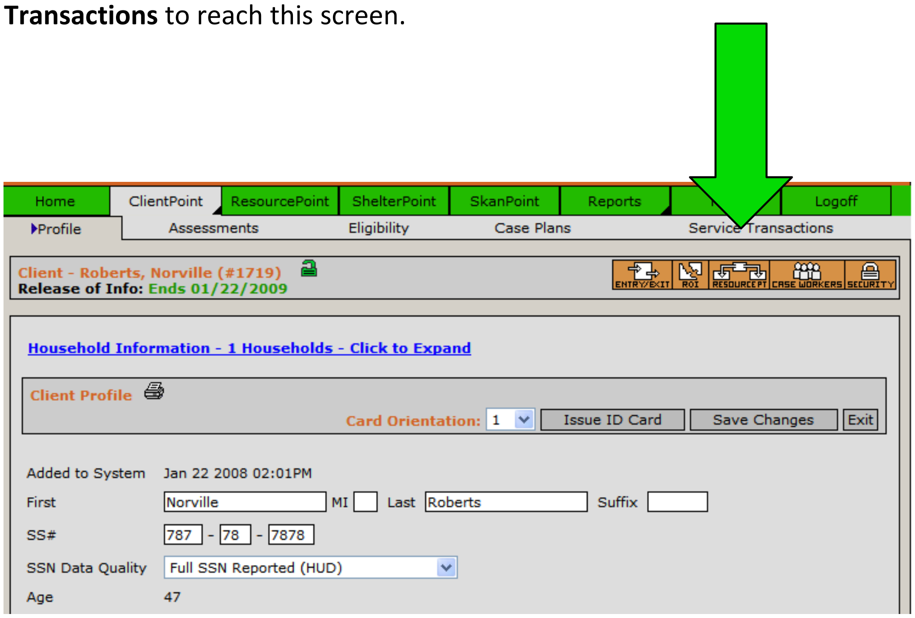
## Recording Services, Needs and Referrals

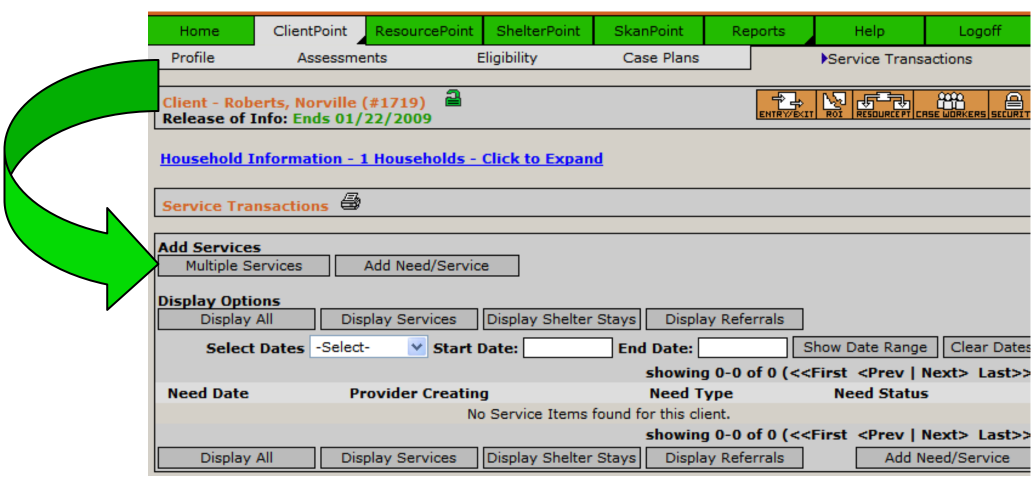
You can record single needs and services, multiple services, unmet needs, and referrals.  Select **Service Transactions** to reach this screen.




## Recording Multiple Services

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

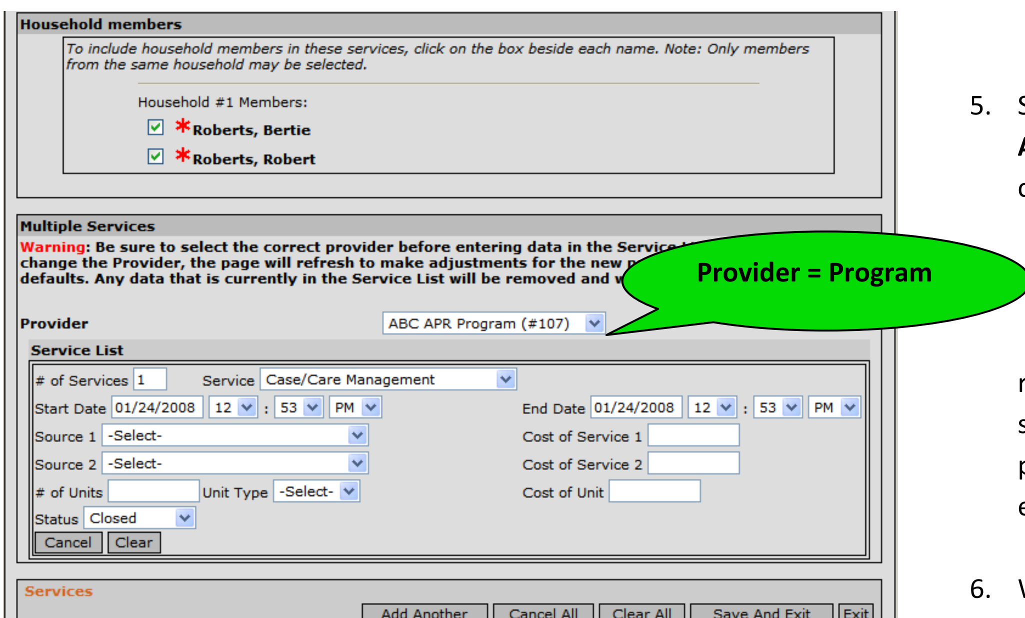
1. To record more than one service at a time, select **Multiple Services.**



2. Check boxes next to household members who are receiving the same services.

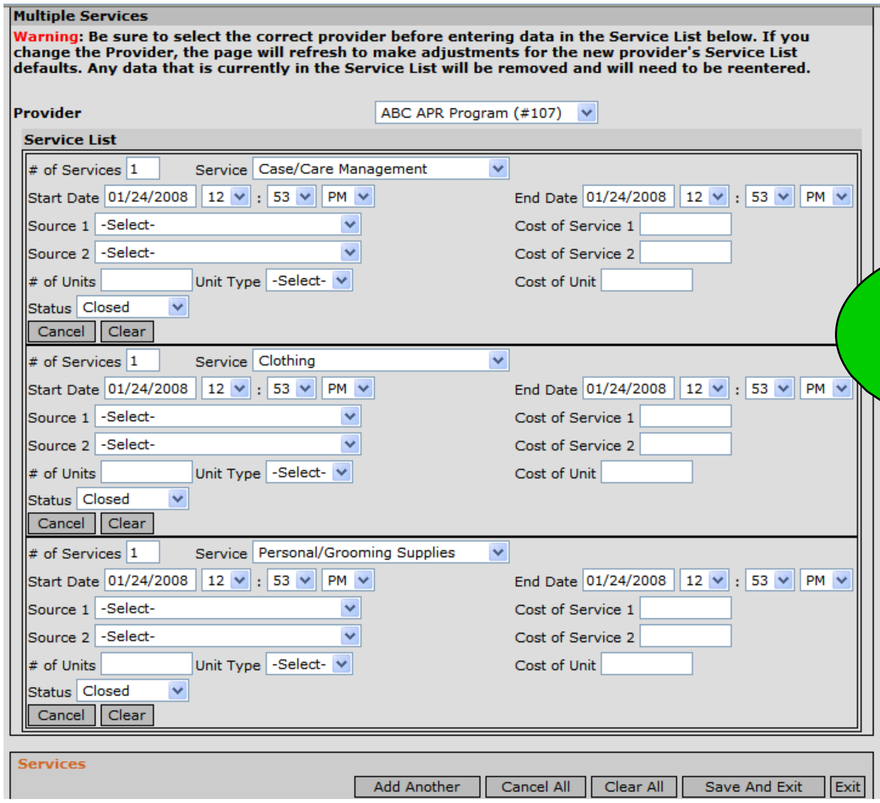
3. For **Provider**, select the **Program** the client is entering.

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




5. Select **Add Another** to continue adding services; record the services provided in each box.

6. When done, click **Save & Exit**.

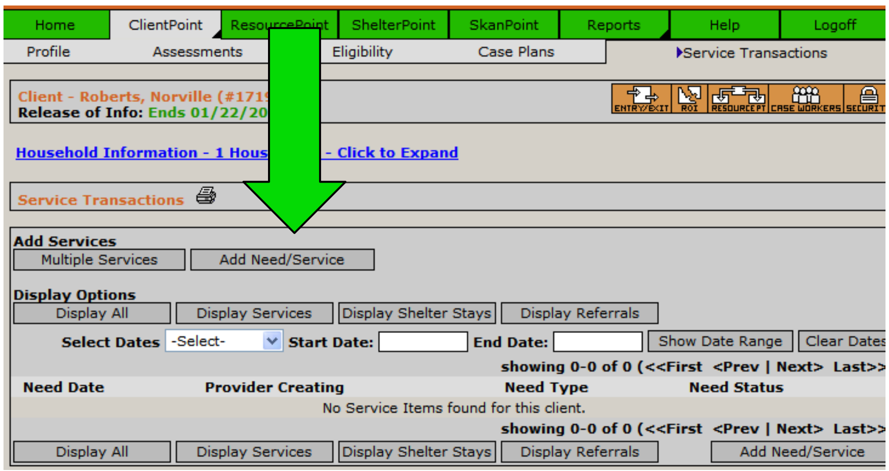



Each time you click *Add Another*, a new box will appear to record services.

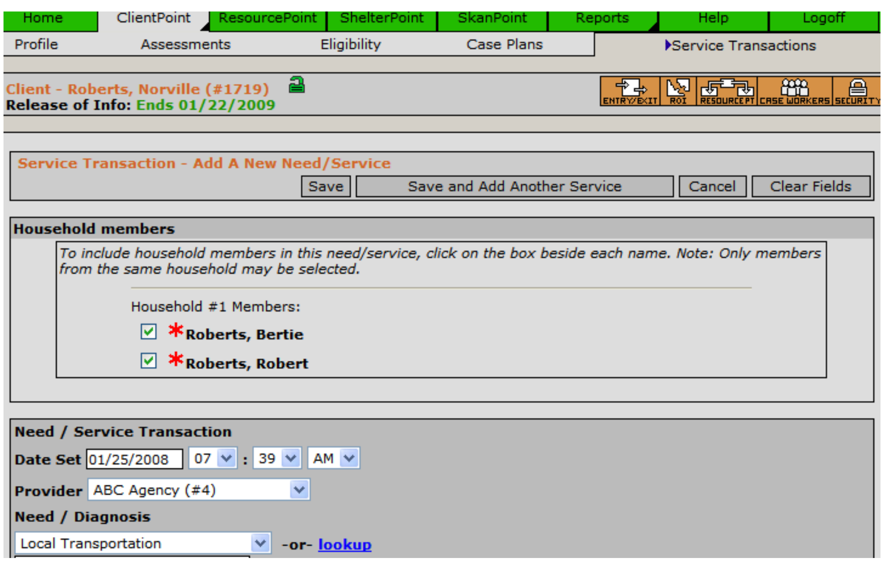
**Recording a Single Service**

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**.

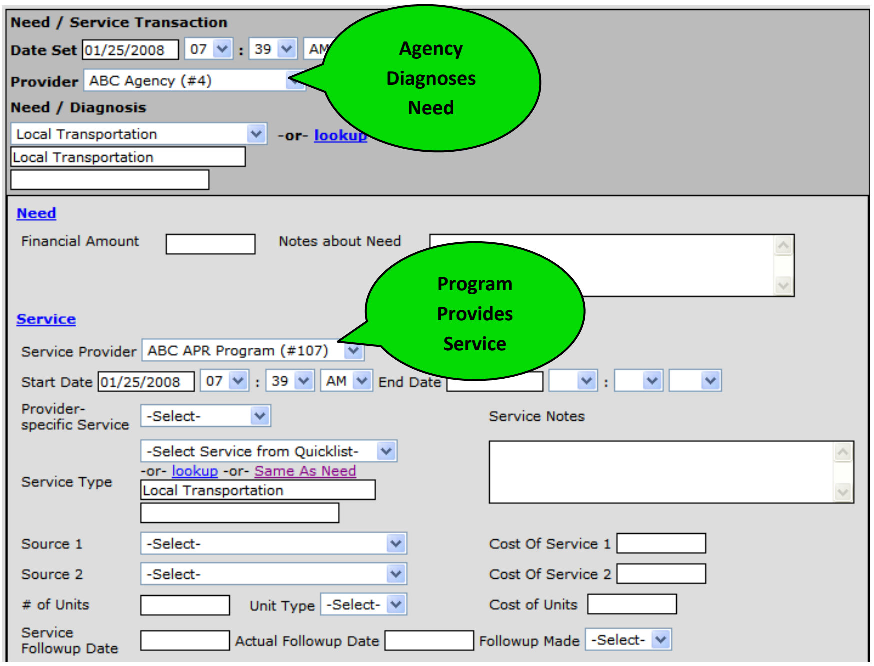
1. Select **Add Need/Service**.




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




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:



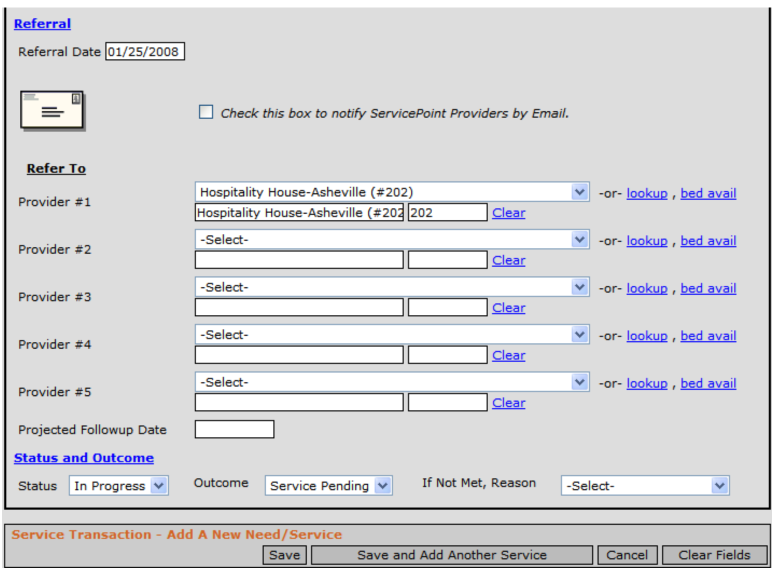

- **Date Set** should be the day the need was diagnosed.
- **Provider** is the Agency (Agency Diagnoses the Need).
- For **Need/Diagnosis**, select the client's need from the drop-down menu.
- Optional: **Financial Amount** is for your agency's tracking needs.
- Optional: **Notes about Need** allows 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**.




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:**