

ENTERING MULTIPLE SERVICES

Use the steps below to record *multiple* services to a client/household at the same time

The 'Add Multiple Services' icon can be found in two locations:

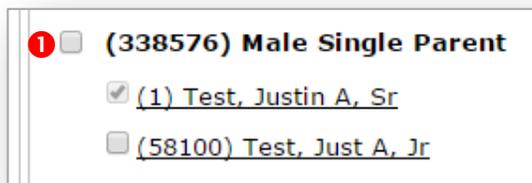
On the **Client Information-Summary** tab

or

In the **Service Transaction** tab menu



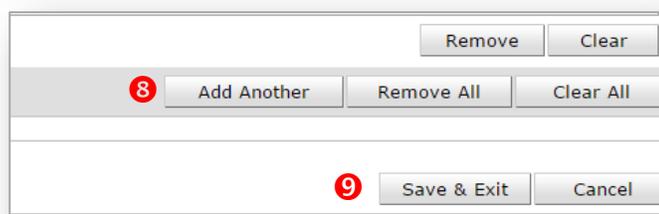
- 1 Check off any family members you want to include in the service transaction. **Services will be applied to all family members that are checked off.**



- 2 Enter the **number** of services you'd like to generate in **both** places (this will typically be 1)
- 3 Set Start Date as the last day of the month that the services took place
- 4 Choose Provider Specific Service
- 5 Choose Service Staff
- 6 Enter the Number of Units rounding to nearest 15 minutes (.25 hours)
- 7 Enter the Unit Type

The screenshot shows the 'Multiple Services' form. It includes a warning message, a 'Service Provider' dropdown menu, and a 'Service List' section. The 'Service List' section has a 'Number of Services' field set to 1 and a 'Need Status' dropdown set to 'Identified'. Below this are fields for 'Number of Services', 'Start Date', 'End Date', 'Service Type', 'Provider Specific Service', and 'Service Staff'. At the bottom of the form is a 'Service Costs' section with fields for 'Number of Units', 'Unit Type', 'Cost per Unit', and 'Total Cost of Units'. Red numbered callouts (1-7) are placed over the form to indicate the steps described in the adjacent list.

- 8 At the bottom of the screen, click 'Add Another' to add a different type services to this client's profile.



- 9 Click 'Save & Exit' to finish