

Service Transactions (v.1)

To indicate a service for your client, click on the **Service Transactions** link under the CLIENTPOINT tab. You can also navigate to this screen by clicking on **Add Need/Service** from within a goal in the *Case Plans* section under the CLIENTPOINT tab.

You can add a single service or multiple services for the client and/or the client's household at the same time.

Note: Household members must be established in the *Profile* section before creating an Entry/Exit.

1. To add a single service:
 - a. If other members of the client's household will be receiving the service, select the check boxes next to the appropriate members' names in the Household members section.
 - b. If you enter data for more than one program, be sure to select the correct Provider.
 - c. Enter the date of the need.
 - d. Either select the **Need/Diagnosis** from the drop down quick list or click on the [lookup](#) link to look up the service in ARIS Taxonomy.
 - e. Select the **Overall Need Status** and the **Overall Outcome** from drop down lists.
 - f. If need is not met, select **Not Met, Reason** from the dropdown menu.
 - g. Enter **Notes about Need** if applicable.
 - h. Click **Save Changes**.

The screenshot displays the 'Service Transaction - Add A New Need/Service' form. At the top, there is a navigation bar with tabs: Home, ClientPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports, Help, and Logoff. Below this, there are sub-tabs: Profile, Assessments, Case Plans, and Service Transactions. The client information is 'Client - Test, Just A. (#1)' with 'Release of Info: None'. The form includes a 'Household members' section with a table listing 'Household #1 Members' and a checked box next to '*Test, Jimmy A.'. The 'Need / Diagnosis' section contains several dropdown menus: 'Provider' (Bismarck CAP - PSH - S+C #1 (#31)), 'Date of Need / Diagnosis' (08/22/2007), 'Need / Diagnosis' (Food Pantries), 'Overall Need Status' (Closed), and 'Overall Outcome' (Fully Met). There is also a text area for 'Notes about Need' containing 'Provided 1 week of food items for father and son'. At the bottom, there are buttons for 'Enter Multiple Services' and 'Save Changes'.

2. To add multiple services at one time:
 - a. Click on **Add Multiple Services** in the bottom left hand corner of the screen.
 - b. If other members of the client's household will be receiving the services, select the check box next to the appropriate member's names in the Household members section.
 - c. If you enter data for more than one program, be sure to select the correct Provider.
 - d. Enter the %Service Start Date+and %Service End Date+.
 - e. Enter the %Quantity+and Select the %Status+for the service.
 - f. Click **Save Changes**.

Services

Save Changes Exit

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:

* Test, Jimmy A.

Multiple Services

Provider: Bismarck CAP - PSH - S+C #1 (#31)

Service Start Date: 08/22/2007 09:34 PM

Service End Date: 08/23/2007 09:00 AM

Quantity: 0 Status: -Select- Set All

Quantity	Status	Description	Service Code
1	Closed	Basic Needs	B
0	-Select-	Food	BD
0	-Select-	Food Pantries	BD-180.200
0	-Select-	Soup Kitchens	BD-500.830
1	Closed	Emergency Shelter	BH-180
0	-Select-	Transitional Housing/Shelter	BH-180.950
0	-Select-	Weatherization Programs	BH-300.180-95
0	-Select-	Rent Payment Assistance	BH-380.700

To view past needs and services, click on **View Past Needs/Services**.

Service Transaction - Add A New Need/Service

View Past Needs/Services Enter Multiple Services Save Changes

A *Service Transactions* list will display.

Service Transactions

Add Need/Service

Need Date	Need Status	Need Type	Outcome	Provider Creating
08/22/2007	Closed	Food Pantries	Fully Met	Bismarck CAP
08/22/2007	Closed	Basic Needs	Fully Met	Bismarck CAP
08/22/2007	Closed	Emergency Shelter	Fully Met	Bismarck CAP