

New feature in 4.01 upgrade

ADDING MULTIPLE SERVICES

Service Quicklist must be identified. This should be in place, however contact me to add any values missing.

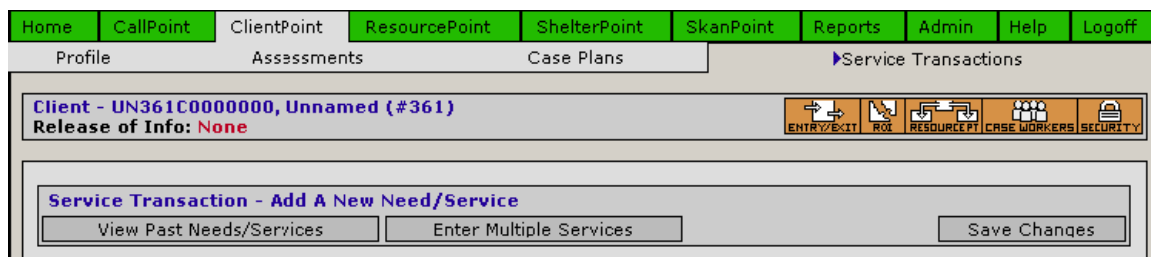
Adding Multiple Services

To streamline workflow and promote ease-of-use within ClientPoint, all users now have the option to enter multiple Services for a client at the same time. The Adding Multiple Services feature offers users more flexibility while increasing productivity. This feature is also available in ShelterPoint.

- This is intended for services you provide that do not require use of the notes field!
- This is NOT intended to be used for referrals!
- This does not allow use of the “... *include household members in this need/service ...*” option.

Complete the following steps to record multiple services that were provided to a client.

1. From the main ServicePoint screen, click on the ClientPoint tab. The ClientPoint search screen will display.
2. Search for an existing client or enter new client data. **Note:** For more information on searching for a client, see the “Searching for a Client Record” section of the ServicePoint Help File
3. Once on the client’s Profile screen, locate and click on the gray Service Transactions tab. The Service Transaction screen will display.
4. Locate and click on the Enter Multiple Services button



The Multiple Services screen displays. (See Figure 1-9)

The screenshot shows the 'Multiple Services' screen. At the top, there is a 'Services' header. Below it, the 'Multiple Services' section contains a 'Provider' dropdown menu set to 'Bowman Systems (#0)' and a 'Date' field set to '10/21/2005'. The main part of the screen is a 'Service List' table. Above the table, there are controls for 'Quantity' (set to 0) and 'Status' (set to '-Select-'), along with a 'Set All' button. The table has four columns: 'Quantity', 'Status', 'Description', and 'Service Code'. The rows are as follows:

Quantity	Status	Description	Service Code
0	-Select-	Food	BD
0	-Select-	Housing/Shelter	BH
0	-Select-	Emergency Shelter	BH-180
0	-Select-	Material Goods	BM
0	-Select-	Temporary Financial Aid	BR
0	-Select-	Transportation	BT

At the bottom of the screen, there are three buttons: 'Print', 'Save & Continue', and 'Cancel'.

5. On the Services screen, choose a provider from the Provider picklist.

Note: The date field will default to the current date.

6. In the Service List area of the screen, locate the Quantity column and enter a quantity for each service needed

7. Locate the Status column and from the associated picklists, enter the status for each service needed. This is not intended for mainstream resource referrals!

8. If the quantities for all services are to be the same, the user has the option of entering the quantity for the services at one time. Enter the desired number in the Quantity field and click the Set All button. This will enter the same number in all of the fields located under the Quantity column.

9. If the status for all services are to be the same, the user can choose the status from the Status field picklist, and click the Set All button. This will enter the chosen status in all of the picklist fields located under the Status column.

10. When all data has been entered, click the Save Changes button. Once saved, the user can exit.