

How To Log CASE MANAGEMENT

ServicePoint - ServiceItem - Microsoft Internet Explorer

Address: https://www3.servicept.com/idaho/scripts/svpserviceitem.php#secProvide

Client - Test, Just A. (#1)
Release of Info: 5 years 5 months 4 days left

Service Transaction - Edit Need/Service

Overview - # Clients: 1

Name	Date Set	Created By	Need Type	Status	Out
Test, Just A	03/25/2004	Idaho Housing and Finance Association	Case Management	Closed	Fu

Need / Diagnosis

Provider: Z Level 2 Test Provider (#664)

Date of Need / Diagnosis: 03/25/2004

Need / Diagnosis: -Select Need from Quicklist- or lookup
Case Management

PH-100

If Need is Financial, Amount:

Overall Need Status: Closed

Overall Outcome: Fully Met

If Not Met, Reason: -Select-

Notes about Need:

Annotations:

- * Find your client
- * Go to Service Transactions
- * Enter Need: Case Management
- * Complete appropriate information
- * Save

The screenshot shows two browser windows. The top window is titled 'ServicePoint - ServiceItem' and displays a table with columns for 'Provider', 'Start Date', 'End Date', 'Provider-specific Service', and 'Referred By'. An 'Add Service' button is circled in red. The bottom window is titled 'ServicePoint - Services Provided' and shows a form for adding a service. The form includes a dropdown for 'Provider' (Idaho Housing and Finance Association (#2)), a dropdown for 'Service' (Case Management), and date pickers for 'Service Start Date' (03/25/2004 04:14 PM) and 'Service End Date' (03/25/2004 06:14 PM). The 'Service Notes' field contains '2 hours'. At the bottom, there are buttons for 'Save & Add Another', 'Save & Exit', and 'Cancel'.

* Once the screen refreshes Add Service

- * Verify the need
- * Enter Valid start and end dates (to represent the date range representing multiple appointments)
- * In Service Notes enter in the TOTAL number of hours (if entering multiple appointments be sure to give a summary of date and hours) – this will be used in draw verification
- * Save