

How to Add, Edit, or Delete a Service

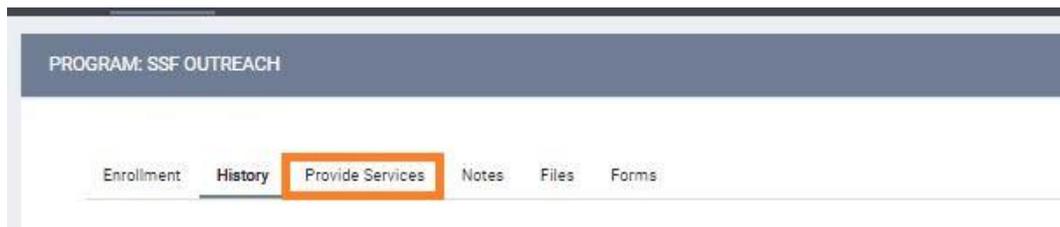
There are times when you need to add, edit, or delete services in a client's enrollment.

- This is a common training request as adding services is important to ensure your client remains active in program enrollments. We recommend services be recorded every 30 days to show chronicity status and a mandatory 90 days or the client will be auto-exited from the program.
- Other directions are provided below on how to edit a service as well. This will aid your workflow for example when a service date or financial amount needs to be changed.
- Also, learning how to delete a service allows for the HMIS to correct accidental program enrollments for clients. All services must be deleted before the HMIS team can delete an accidental enrollment.

Please follow the steps below.

Adding a Service

When all Enrollments are complete, the "Provide Services" tab will appear for your main client (head of household) within that program. Select this tab to explore various services offered by the program:



- After selecting the service you are providing, enter the Start and End Date, as well as any expense associated with the service. If applicable, verify that the proper funding source is selected and checkmark any group members who should also receive this service.

HMIS Job Aid



PROGRAM: ** STREET OUTREACH TRAINING PROGRAM

Enrollment History **Provide Services** Assessments Goals Notes Files Chart Forms ✕ Exit

Services

Alcohol & Drug Abuse Services Alcohol and Drug Abuse ▾

Case Management: Documentation Assistance Case Management ▾

Case Management: General Case Management ▾

General Case Management

Date: 07/07/2023 📅 Time: 11:19 🕒

Tracking: None ▾ None ▾

Geolocation: ADD LOCATION

SUBMIT

- If the service has an “End Date” field, it is recommended to project the End Date into the future to avoid being disabled prior to client exit. For example, if your program is 90 days and gives extensions, it’s safer and best practice to extend the services a few additional months upon program entry. All services “End Date” MUST be updated and should not exceed the client’s actual program exit date. All active services will appear at the bottom of the exit screen.

- Select the ‘Submit’ button to save changes and add any further services from previous steps

When you have finished, both the program enrollment and associated services should be visible from the Program History:

PROGRAM: SSF OUTREACH

Enrollment **History** Provide Services Notes Files Forms ✕ Exit

Program Service History

Service Name	Start Date	End Date	
Alcohol and other Drug Services:Referred Sacramento Steps Forward	12/12/2017	12/12/2017	🗨️

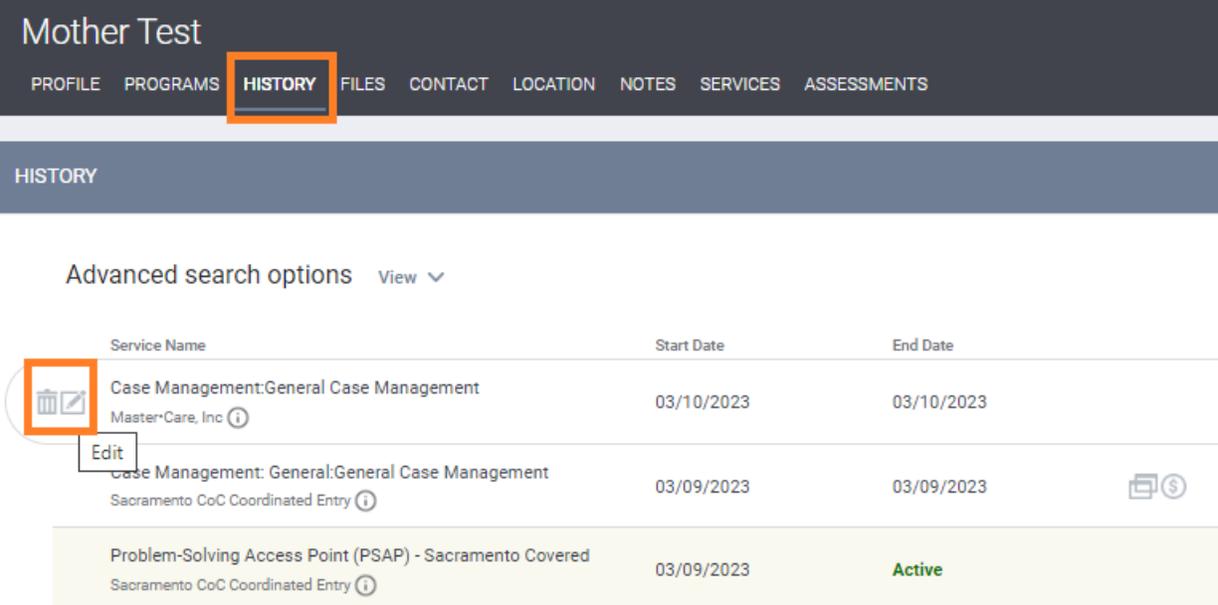
Reservation Service Referral

Managed with: Clarity Human Services

- If further services need to be added, return to the ‘Programs’ tab and repeat the above steps.

Editing a Service

To edit a service, click on the History tab of the Global Task Bar. This tab brings up all of the client's enrollments, services, assessments, referrals, and CE events. When you move your mouse near the service you want to edit, the trashcan and pencil icons appear. Click on the pencil to edit the service. Make whatever changes you need to make and scroll to the bottom to save.



Mother Test

PROFILE PROGRAMS **HISTORY** FILES CONTACT LOCATION NOTES SERVICES ASSESSMENTS

HISTORY

Advanced search options View ▾

Service Name	Start Date	End Date
Case Management:General Case Management Master-Care, Inc ⓘ	03/10/2023	03/10/2023
Case Management: General:General Case Management Sacramento CoC Coordinated Entry ⓘ	03/09/2023	03/09/2023
Problem-Solving Access Point (PSAP) - Sacramento Covered Sacramento CoC Coordinated Entry ⓘ	03/09/2023	Active

Delete a Service

To delete a service, click on the trash can shown to the left in the image above. The pop-up will ask you to confirm that you want to delete the service.