

As of build 111, user's can edit services rather than having to delete them and then add a new service. In prior builds user's could edit units, the price, and custom fields, however starting in build 111 all service fields can be edited. User's can edit the service date and then enter a contract or jump to the services first to select a different service.

To edit a service, follow these instructions:

1. Click *Services*.
2. Click a service.
3. Click *View*.
4. Click *Edit*.
5. Click the *Date*.
6. Select a date in the calendar.
7. Select the *Contract*.
8. Select the *Service Name*.

Once the *Service Name* is selected, the default *Units* and *Price* are updated based settings in the *Contract* selected. All *Custom Service Fields* are replaced with those active for the current selected service.

9. Complete the remaining fields as needed.
10. Click *Save*.

Note: The *Contract* list is based on the *Date* selected. If a contract is missing from the list after changing the *Date*, verify the contract's *Start Date* and *End Date* under [Contract Management](#). The *Service Name* list is based on the *Contract* selected. Only the subservice active for the *Contract* selected appear in the *Service Name* list, unless the *Contract* is blank. If a service is missing from this list, activate the subservice for a contract item in the selected contract under [Contract Management](#).

If the *Date* is changed to a *Date* prior to the *Start Date* or after the *End Date* of the *Contract* previously selected in the edited service record, the *Contract* name is removed and left blank. User's can start by selecting the *Service Name* first if they choose. If the *Service Name* is selected first, the *Contract* list is updated based on the *Service Name* selected.

The screenshot shows the 'Edit' form for a service record. The breadcrumb trail is 'Find Client > Search Results > View Details > Services > View > Edit'. At the top left are 'Save' and 'Cancel' buttons. The form fields are: Provider: Kevin's Clinic; Client: talthaneil, tinurina; Date: 12/04/2019; Contract: (empty); Service Category: (dropdown menu showing 'Page 1 of 18'); Service Name: (dropdown menu with a search tooltip that says 'Type the first few characters to search through 172 choices.'). Below these fields, the following information is displayed: Units: A/O Medical Care; Price: Adherence counseling; Total: Advocacy. A 'Go To Top' button is visible on the right side.

By selecting the *Service Name* first, the *Contract* list is populated based on contracts this service is active for as of the *Date* selected.

The screenshot shows the 'Edit' form for a service record. The breadcrumb trail is 'Find Client > Search Results > View Details > Services > View > Edit'. At the top left are 'Save' and 'Cancel' buttons. The form fields are: Client: talthaneil, tinurina; Date: 12/06/2019; Contract: Part A; Service Category: Health ed./risk reduction/prevention; Service Name: Counseling. The 'Contract' and 'Service Name' fields are highlighted in yellow.

When editing services it is important to consider the effect on custom service fields. If the *Service Name* remains the same when the edited service is saved, the custom values are retained. If the *Service Name* is changed, the custom service values are blank allowing a new entry.

Here is an example for a custom service attachment record.

In this case, the *Service Name* A/O Medical Care has an attachment.


Find Client > Search Results > View Details > Services > View > Edit


Save Cancel


Edit

Provider: Kevin's Clinic

Client: talthaneil, tinurina

Date: 12/16/2020 

Contract: **First Contract** 

Service Category: Outpatient/Ambulatory Health Services 

Service Name: **A/O Medical Care**

Units:

Price: \$


Total: \$

Service Provided By:

Start Time:

End Time:

Service Comment:

Case Manager (WRMA webinar): 

Client Documents: **1 Attachments** (Access in view mode only)

If the *Contract* is changed and the *Service Name* remains the same after the edit, the attachment remains for the service.


Find Client > Search Results > View Details > Services > View > Edit


Save Cancel


Edit

Provider: Kevin's Clinic

Client: talthaneil, tinurina

Date: 12/16/2020 

Contract: 2015 Contract 

Service Category: Outpatient/Ambulatory Health Services 

Service Name: A/O Medical Care

Units: 1

Price: 0.01 \$


Total: 0.01 \$

Service Provided By:

Start Time: 12:00 AM

End Time: 12:00 AM

Service Comment:

Case Manager (WRMA webinar): 

Client Documents: 1 Attachments (Access in view mode only)


In this case, the *Service Name* was changed during the edit.


Find Client > Search Results > View Details > Services > View > Edit


Save Cancel

Edit

Client: talthaneil, tinurina

Date: 12/16/2020 

Contract: First Contract 

Service Category: Outpatient/Ambulatory Health Services 

Service Name: o/a mc

Units: 1

Price: 0.01 \$


Total: 0.01 \$

Provided By:

Start Time:

End Time:

Service Comment:

Case Manager (WRMA webinar): 

Client Documents: 0 Attachments (Access in view mode only)

The document attached to the other service is no longer in the *Attachment List*. A new document can then be uploaded if needed.