

Service Rapid Entry allows users to quickly add individual services to clients, skipping the step of looking up that client record.

Rapid Entry > Service Rapid Entry

Edit View Service List Back

Service Rapid Entry

Contains last:

:

As Of:

Users identify clients from a list of recently entered services, and then they can jump back and forth from that list to a service data entry screen. The first step is to generate that list.

The service list is generated based on the *As Of Date* selected and the *Contains Last* value.

- Calendar Months – Number of months prior to As Of Date.
- Calendar Years – Number of years prior to As Of Date.
- Records – Number of records prior to As Of Date.

Rapid Entry > Service Rapid Entry

Save Cancel

Service Rapid Entry

Contains last:

: Click here to select from 3 choices.

As Of:

- Calendar Months
- Calendar Years
- Records

Once the selections are saved, click *View Service List* to see the results and add services.

Rapid Entry > Service Rapid Entry > Services

Choose A Client New Service For Donald Duck New Service For Selected Client Edit Delete Back Print or Export

Services

Search:

| Date | Date | Last Name | First Name | Middle Name | Service | Units |
|------------|------------|-----------|------------|-------------|---------------------|-------|
| 07/05/2020 | 07/05/2020 | Jeffers | Blair | | A/O Medical Care | 11 |
| 07/02/2020 | 07/02/2020 | Beethoven | Ludwig | Mozart | Adherence counseli | 1 |
| 07/01/2020 | 07/01/2020 | Aadland | Abbey | | Applying tea leaves | 1 |
| 07/01/2020 | 07/01/2020 | Test | Abbie | | A/O Medical Care | 8 |

- Choose A Client – Allows users to use Find Client to look for a client not in the list.
- New Service for Donald Duck – The client selected in *Choose a Client* is linked here allowing users

quick access to add services to that client.

New Service for Selected Client – This allows users to add a service to the client selected.

Edit – This allows users to edit a service the user selected.

Delete – This allows users to delete a service selected.

Back – Takes user back to the As Of Date menu.

Print or Export – Allows users to print or export the service list.