

# Entering Services

To enter a new service or make changes to previously entered services click *Services*.

The screenshot shows the 'Services' management interface. At the top, there is a navigation bar with buttons for 'View', 'Add', 'Delete', 'Receipts', and 'Print or Export'. Below this is a search bar and a table of services. The table has columns for 'Date', 'Subservice', and 'Contract'. A dropdown menu is open under the 'Date' column header, showing a list of fields with checkboxes. A callout box explains the functions of the navigation buttons: 'View' for viewing details, 'Add' for adding new services, 'Edit' for changing services, 'Delete' for removing services, 'Receipts' for adding payment records, and 'Print or Export' for creating reports or CSV files. Another callout box points to the dropdown menu, explaining that clicking the drop-down arrow for any column header allows users to adjust which columns are available.

**Services**

View Add Delete Receipts Print or Export

**Services**

Search:

Date	Subservice	Contract
3/22/201	<input type="checkbox"/> PK <input type="checkbox"/> DomainPK <input type="checkbox"/> ClientPK <input checked="" type="checkbox"/> Date <input checked="" type="checkbox"/> Subservice <input type="checkbox"/> SubserviceKey <input type="checkbox"/> ServiceCategoryKey <input type="checkbox"/> ContractKey <input checked="" type="checkbox"/> Contract <input checked="" type="checkbox"/> Units <input checked="" type="checkbox"/> Price <input checked="" type="checkbox"/> Total <input checked="" type="checkbox"/> Amount Received <input checked="" type="checkbox"/> DomainName <input type="checkbox"/> EmployeeKey <input checked="" type="checkbox"/> Service Provided By <input checked="" type="checkbox"/> Start Time <input checked="" type="checkbox"/> End Time <input type="checkbox"/> CanEdit	e Manag

View – Allows a user to view a service details.  
Add – Allows a user to add a new service.  
Edit – Allows a user to change a service.  
Delete – Removes the service from the client’s record.  
Receipts – Adds a payment record.  
Print or Export – Creates a printable report or exports services list as a CSV file.

Click the drop down arrow for any column header to adjust which columns are available.

Note: Services are required for the RSR. The service category of services delivered determines what other data is required for the client in the RSR.

1. Click *Add*.

**Services**

[View](#) **Add** [Delete](#) [Receipts](#) [Print or Export](#)

## Services


Search:


Date	Subservice	Contract	Units	Price	Total
3/22/2018	Case Management	Case Management	1	\$0.00	\$0.00

2. Enter *Date*.

**Services > Add Service**

[Next](#) [Back](#)


Date:  


Service Name:  

3. Click the drop down arrow.
4. Select a service.
5. Click *Next*.

**Services > Add Service**

[Next](#) [Back](#)

Date:  

Service Name:  

Case Management One

6. Click the drop down arrow for *Contract*, if applicable.
7. Select a *Contract*.
8. Enter the number of *Units*.
9. Enter the *Price*.
10. Click *Save*.

The screenshot shows a web application interface for adding a service. The breadcrumb trail is "Services > Add Service > Add Service". There are "Save" and "Back" buttons. The form contains the following fields and values:

- Date: 4/9/2018
- Service Name: Case Management One
- Contract: Case Management
- Units: 1
- Price: 0.00 \$
- Total: 0.00 \$

A yellow tooltip message is displayed over the Contract field, stating: "The client is not eligible to receive Ryan White services as of : 4/9/2018".

**Date** - The service date must be on or after the enrollment date.

**Contract** - Contracts listed are active as of the date selected and have the selected subservice available in a contract item. If the service is only funded for one contract that contract will auto-fill under the Contract field.

**Units** – Number of units of service. Units are used to calculate the Total.

**Price** – The cost of the service. Price is used to calculate the total. This may be a default value set in the contract.

**Total** – The total value for units times the price.

**Note** – The quality check message regarding eligibility is informing the user that as of the date of this service, that client is not eligible for the Ryan White funding source that service is funded for. The client's eligibility is updated in Eligibility History under Personal.

## Receipts

1. Click the service record to highlight it.
2. Click *Receipts*.

Services

[View](#) [Add](#) [Delete](#) [Receipts](#) [Print or Export](#)

### Services

Search:

Date	Subservice	Contract	Units	Price	Total
3/22/2018	Case Management	Case Management	1	\$0.00	\$0.00

3. Click *Add*.

Services > Receipts

[View](#) [Add](#) [Edit](#) [Delete](#) [Back](#) [Print or Export](#)

### Service-Amount Received


Search:

Receipt Date	Amount	Source
--------------	--------	--------

4. Enter *Date*.
5. Enter *Amount*.
6. Enter *Source*.
7. Click *Save*.

Services > Receipts > Add

[Save](#) [Back](#)

Receipt Date:  

Amount:  \$

Source:

Services > Service-Amount Received

[View](#) [Add](#) [Edit](#) [Delete](#) [Back](#) [Print or Export](#)

## Service-Amount Received

Search:

Receipt Date	Amount	Source
4/6/2018	\$3.00	Part B

To print values in a window click *Print or Export* to get to the *Report Setup*.

Client Search > Report Setup

[Back](#)

## Print or Export

<a href="#">Print Current Page</a>	Generate a report for the current page in a printable format
<a href="#">Print All Pages</a>	Generate a report for the current list in a printable format
<a href="#">View Current Page as a PDF document</a>	Generate a PDF document for the current page in a printable format
<a href="#">View All Pages as a PDF document</a>	Generate a PDF document for the current list in a printable format
<a href="#">Printable List Format Options</a>	Customize the report format
<a href="#">CSV Export (All Pages)</a>	Download the list as a CSV File

Click *Printable List Format Options* to edit the format of printed pages.

[Edit](#) [Back](#)

Title Font:	<input type="text" value="Georgia"/>
Title Font Size:	<input type="text" value="12"/>
Bold Title:	<input checked="" type="checkbox"/>
Italicize Title:	<input type="checkbox"/>
Underline Title:	<input checked="" type="checkbox"/>
Report Header Font:	<input type="text" value="Times New Roman"/>
Report Header Font Size:	<input type="text" value="12"/>
Bold Report Header:	<input type="checkbox"/>
Italicize Report Header:	<input type="checkbox"/>
Column Header Font:	<input type="text" value="Times New Roman"/>
Column Header Font Size:	<input type="text" value="10"/>
Bold Column Headers:	<input checked="" type="checkbox"/>
Italicize Column Headers:	<input type="checkbox"/>
Underline Column Headers:	<input checked="" type="checkbox"/>
Data Row Font:	<input type="text" value="Times New Roman"/>
Data Row Font Size:	<input type="text" value="10"/>
Bold Data Rows:	<input type="checkbox"/>
Italicize Data Rows:	<input type="checkbox"/>