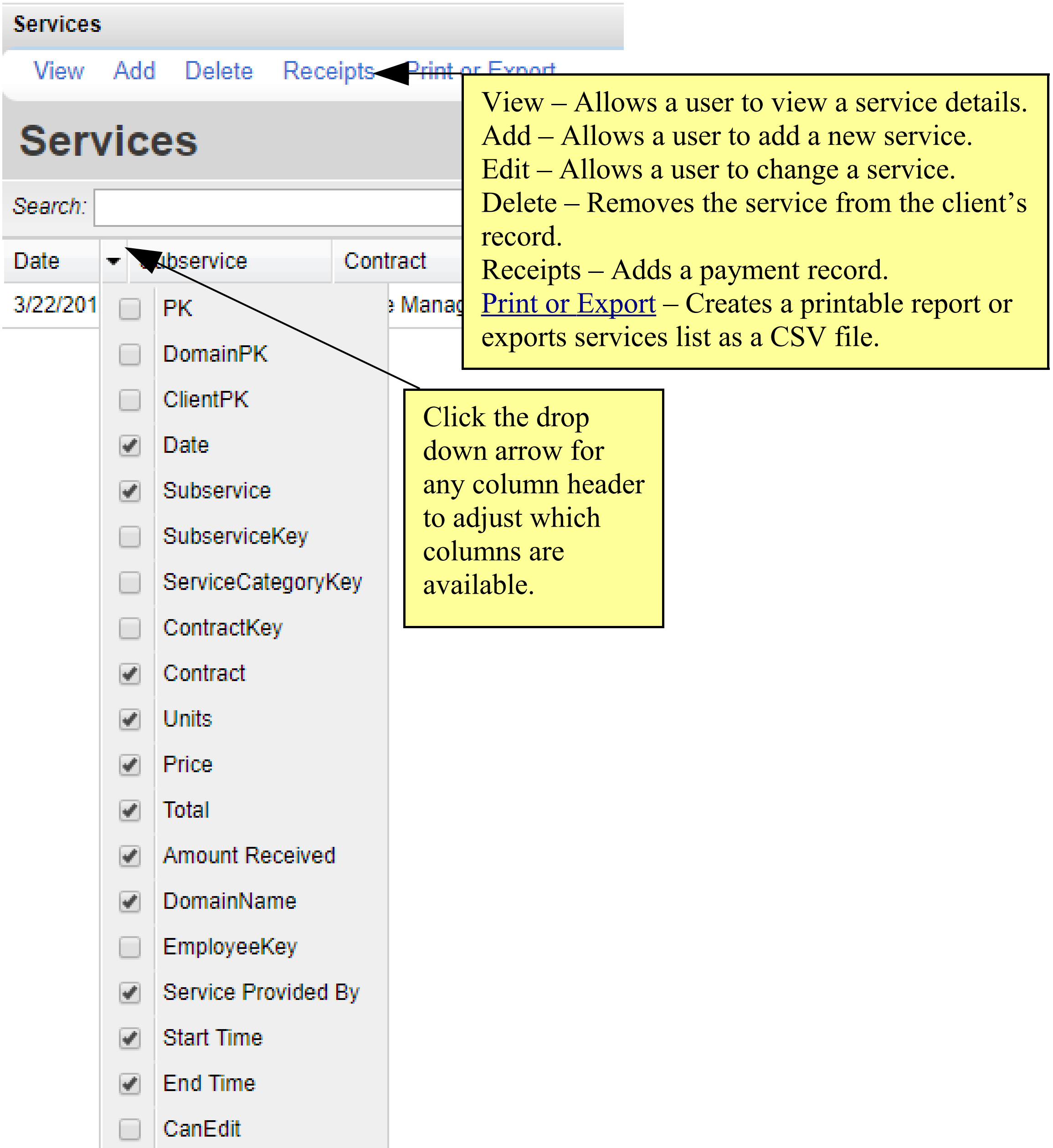
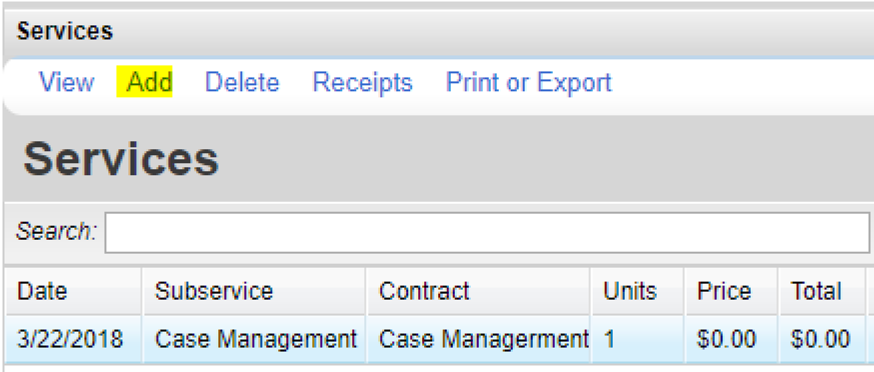
Entering Services

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

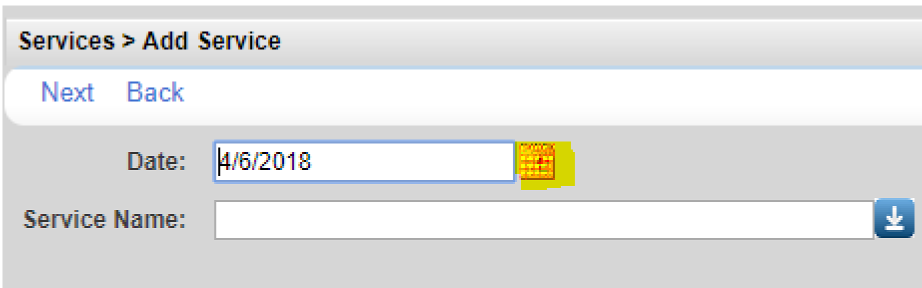


Note: Services are required for the RSR. The service category of services delivered determines what other data is required for the client in the RSR.

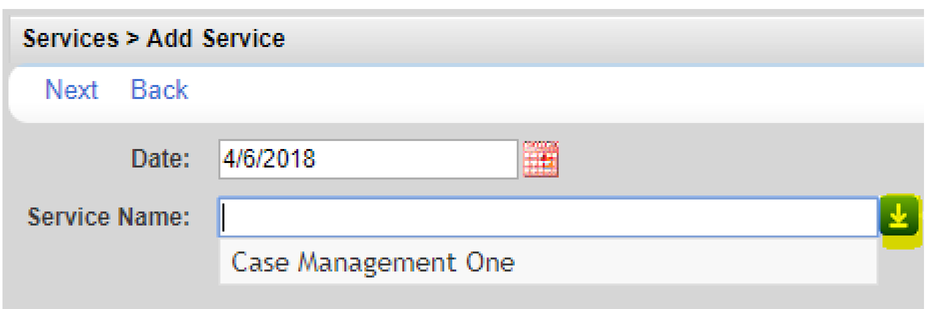
1. Click *Add*.



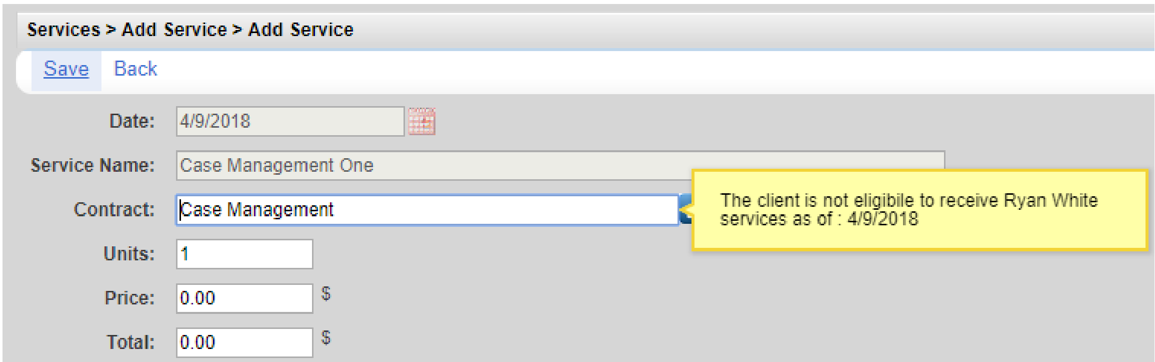
2. Enter *Date*.



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



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*.



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.

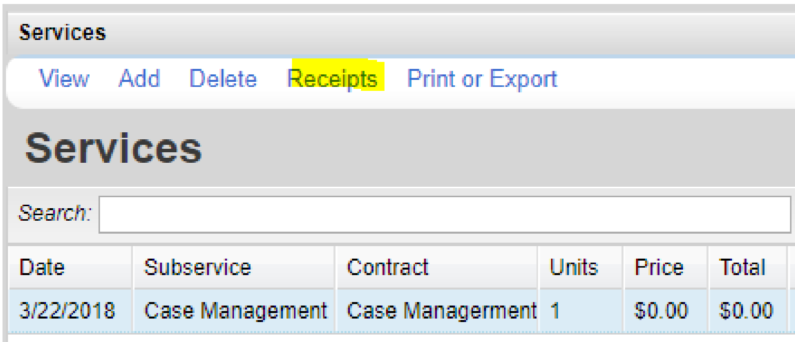
Price – The cost of the service. Price is used to calculate the total. This may be a default value set in the contract.

Total – The total value for units times the price.

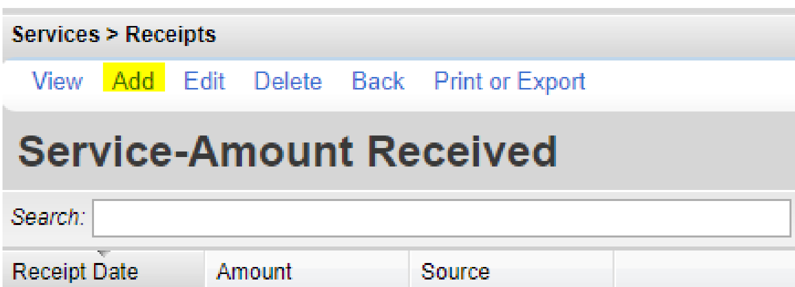
Note – The quality check message regarding eligibility is informing the user that as of the date of this service, that client is not eligible for the Ryan White funding source that service is funded for. The client's eligibility is updated in Eligibility History under Personal.

Receipts

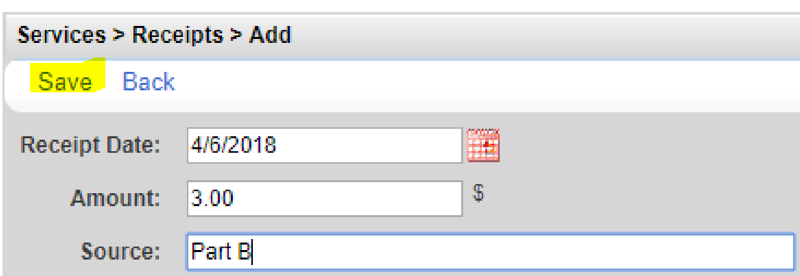
1. Click the service record to highlight it.
2. Click *Receipts*.

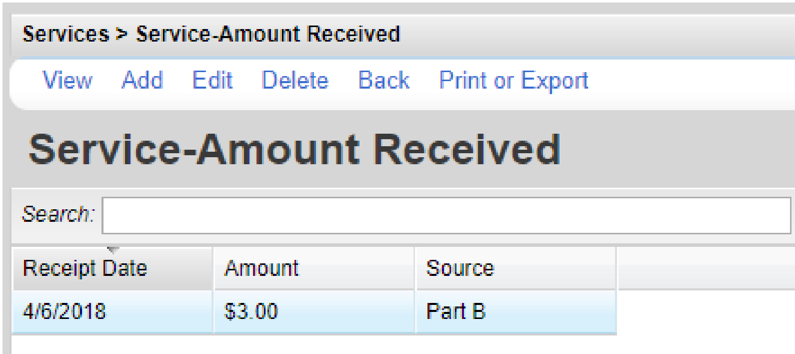


3. Click *Add*.



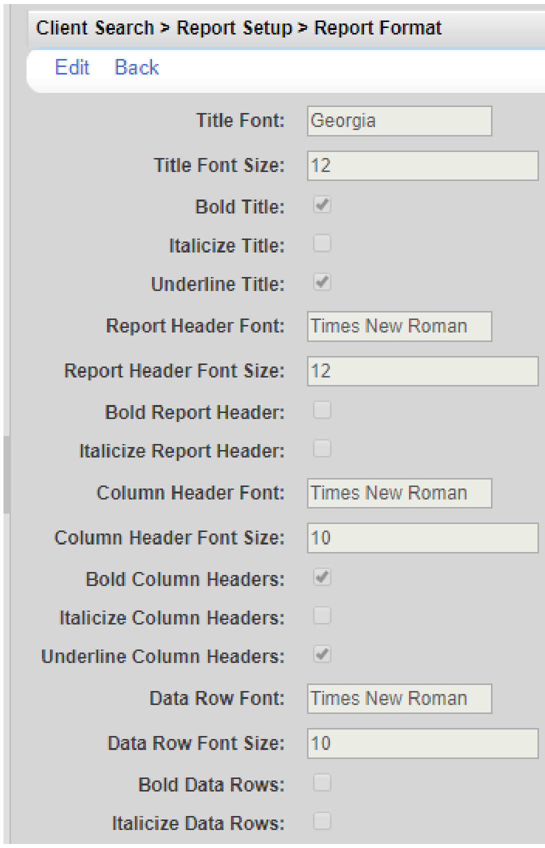
4. Enter *Date*.
5. Enter *Amount*.
6. Enter *Source*.
7. Click *Save*.





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

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


Client Search > Report Setup > Report Format

Edit Back

Title Font:	Georgia
Title Font Size:	12
Bold Title:	✓
Italicize Title:	
Underline Title:	✓
Report Header Font:	Times New Roman
Report Header Font Size:	12
Bold Report Header:	
Italicize Report Header:	
Column Header Font:	Times New Roman
Column Header Font Size:	10
Bold Column Headers:	✓
Italicize Column Headers:	
Underline Column Headers:	✓
Data Row Font:	Times New Roman
Data Row Font Size:	10
Bold Data Rows:	
Italicize Data Rows:	