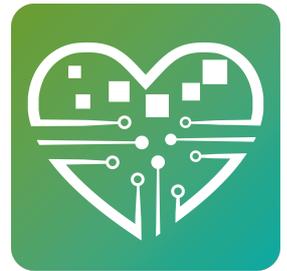


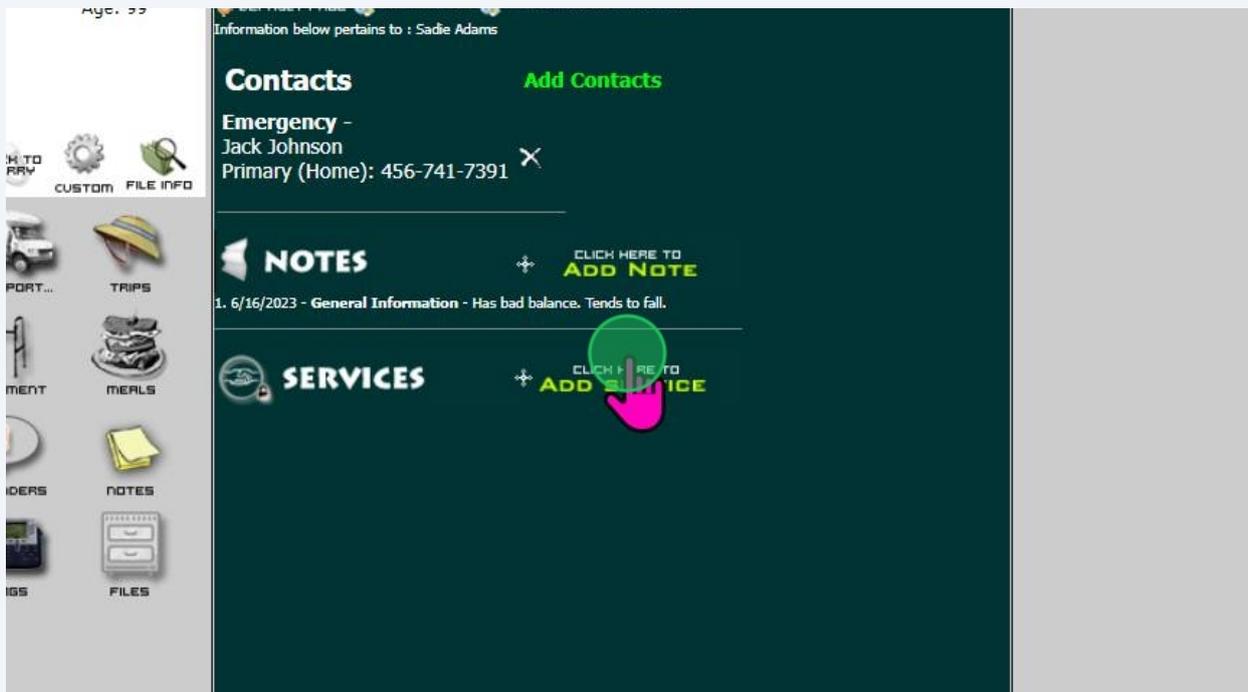
Outreach/Services



1

Services is designed for more confidential case notes that service providers are entering that not everybody at your organization should be able to see. Outreach Workers use it, Social Service Providers use it, Nurses use it, it depends on each center and who they have working there. But the main point is that you are able to decide who has access and who does not. Whenever any staff member gets their user name/login set up, an admin has to choose their permissions. During that process they are deciding whether or not you have access to the services section. If you have access you see the services section there and you can see past records as well as add new records and run reports. If you do not have access then you simply do not see the services section at all and it just doesn't exist for you.

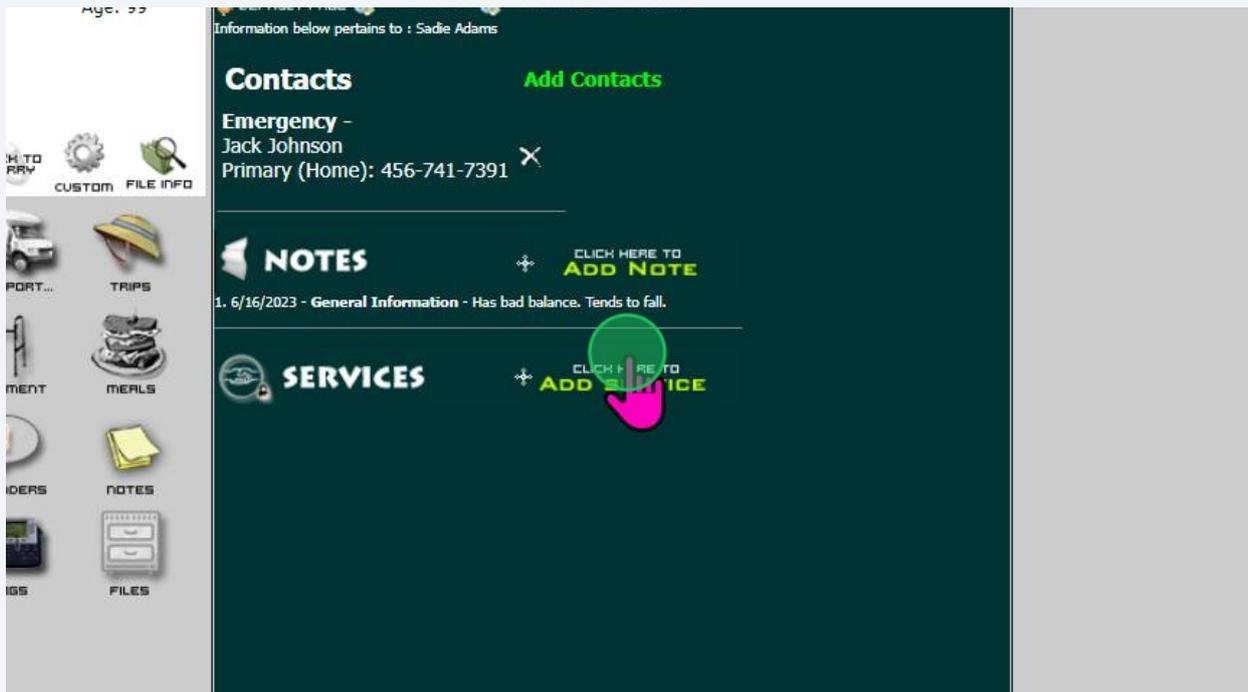
Click "Add Service"



2

Services is designed for more confidential case notes that service providers are entering that not everybody at your organization should be able to see. Outreach Workers use it, Social Service Providers use it, Nurses use it, it depends on each center and who they have working there. But the main point is that you are able to decide who has access and who does not. Whenever any staff member gets their user name/login set up, an admin has to choose their permissions. During that process they are deciding whether or not you have access to the services section. If you have access you see the services section there and you can see past records as well as add new records and run reports. If you do not have access then you simply do not see the services section at all and it just doesn't exist for you.

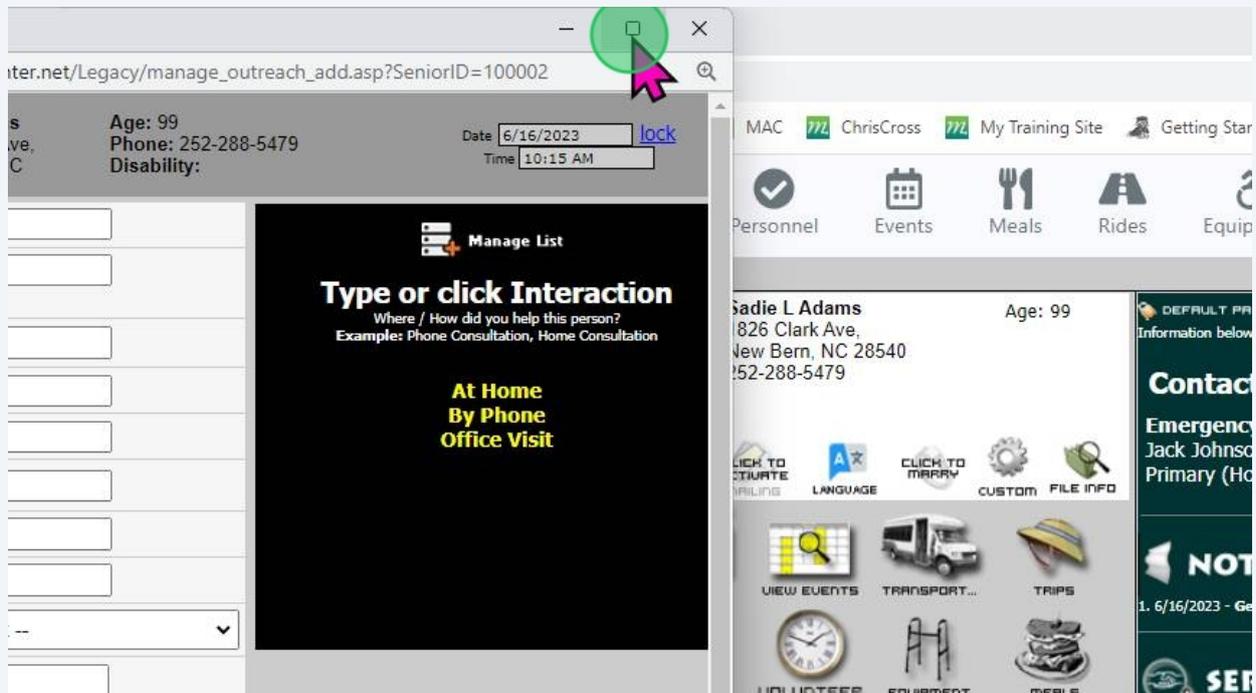
Click "Add Service"



3

Here we're creating a record of a one-on-one interaction that we had with this person on a specific date and time. The date and time will default to the current date and time but you can change those. You can put in past dates, future dates, and anytime that you want. Mostly what you'll be doing is choosing from lists. Just like with our note categories, all of these lists can be edited. There's always a link at the top to manage the list just like with our note categories.

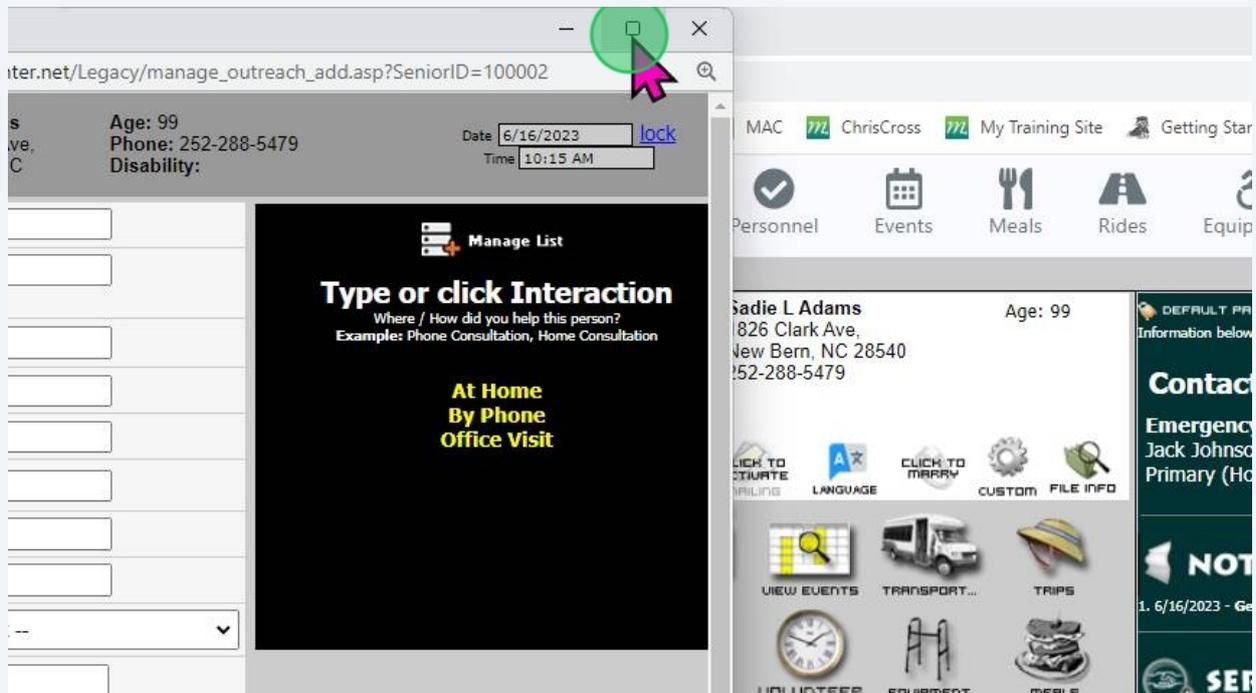
Expand the Window



4

Here we're creating a record of a one-on-one interaction that we had with this person on a specific date and time. The date and time will default to the current date and time but you can change those. You can put in past dates, future dates, and anytime that you want. Mostly what you'll be doing is choosing from lists. Just like with our note categories, all of these lists can be edited. There's always a link at the top to manage the list just like with our note categories.

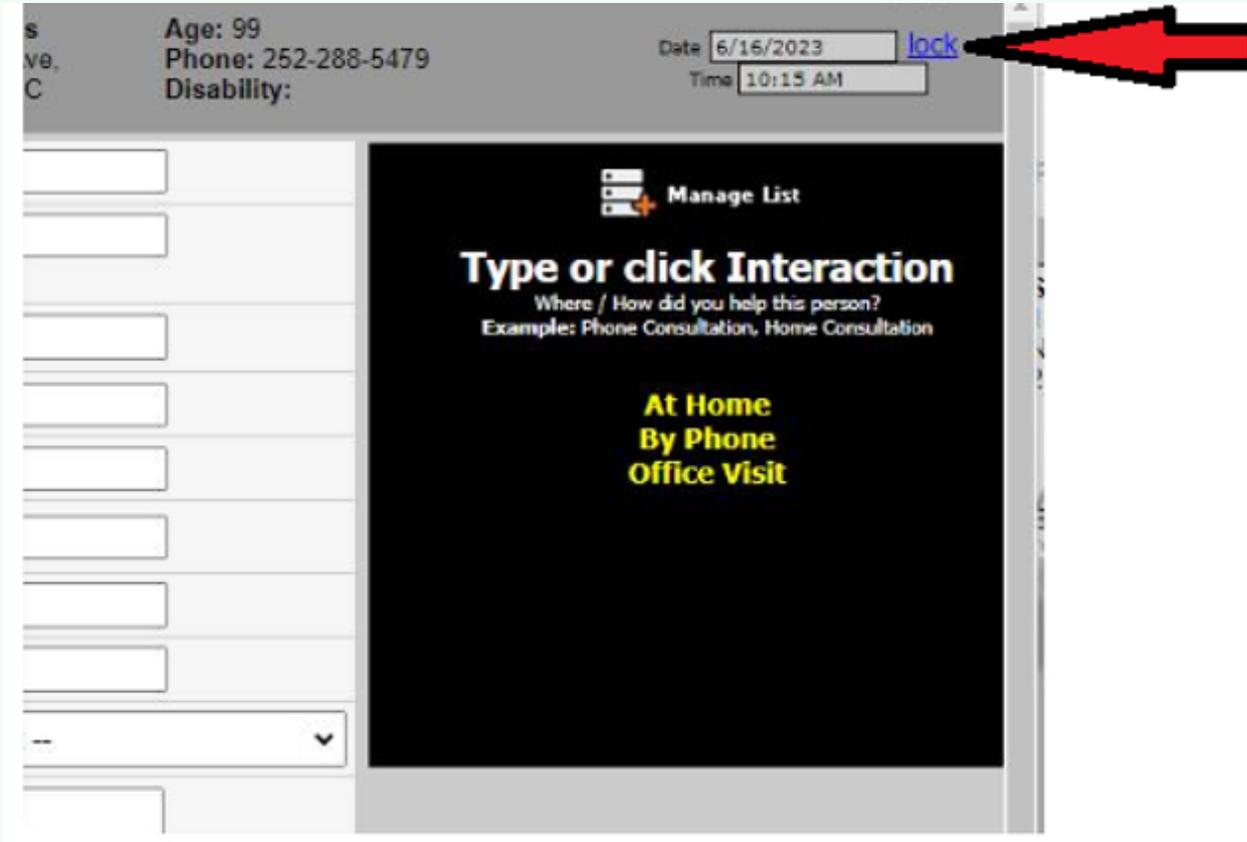
Expand the Window





Clicking the "Lock" link to the right of the date will lock the date field to that date.

The lock button allows you to set a default date. This way if you have multiple records to enter for one day in the past, you don't have to keep choosing the date over and over. Logging out of MySeniorCenter removes that default.



5 First we're going to choose an interaction type.

ter.net/Legacy/manage_outreach_add.asp?SeniorID=100002

Sadie Adams
1826 Clark Ave,
New Bern, NC

Age: 99
Phone: 252-288-5479
Disability:

Date: 6/16/2023 lock
Time: 10:15 AM

Interaction	<input type="text"/>
Category Edit	<input type="text"/>
Assistance Edit	<input type="text"/>
Refer From	<input type="text"/>
Refer To	<input type="text"/>
Service Units	0
Hours	1
Rate	0
Account	-- Select Account --
Notes	<input type="text"/>

ADD ADD and Open Custom Fields

Manage List

Type or click Interaction

Where / How did you help this person?
Example: Phone Consultation, Home Consultation

At Home
By Phone
Office Visit

6 First we're going to choose an interaction type.

ter.net/Legacy/manage_outreach_add.asp?SeniorID=100002

Sadie Adams
1826 Clark Ave,
New Bern, NC

Age: 99
Phone: 252-288-5479
Disability:

Date: 6/16/2023 lock
Time: 10:15 AM

Interaction	<input type="text"/>
Category Edit	<input type="text"/>
Assistance Edit	<input type="text"/>
Refer From	<input type="text"/>
Refer To	<input type="text"/>
Service Units	0
Hours	1
Rate	0
Account	-- Select Account --
Notes	<input type="text"/>

ADD ADD and Open Custom Fields

Manage List

Type or click Interaction

Where / How did you help this person?
Example: Phone Consultation, Home Consultation

At Home
By Phone
Office Visit

7 Next you'll categorize the interaction.

ter.net/Legacy/manage_outreach_add.asp?SeniorID=100002

Sadie Adams
1826 Clark Ave,
New Bern, NC

Age: 99
Phone: 252-288-5479
Disability:

Date: 6/16/2023 lock
Time: 10:15 AM

Interaction	By Phone
Category	<input type="text"/>
Assistance	<input type="text"/>
Refer From	<input type="text"/>
Refer To	<input type="text"/>
Service Units	0
Hours	1
Rate	0
Account	-- Select Account --
Notes	<input type="text"/>

Multi Add - Single Add
Manage List

Type or click Category
What category would this Outreach action fall under?
Example: Are You OK?, Advocacy, Heating Oil

- Are You Ok
- Family Support
- Heating Oil
- Insurance
- Medical

ADD ADD and Open Custom Fields

8 Next you'll categorize the interaction.

ter.net/Legacy/manage_outreach_add.asp?SeniorID=100002

Sadie Adams
1826 Clark Ave,
New Bern, NC

Age: 99
Phone: 252-288-5479
Disability:

Date: 6/16/2023 lock
Time: 10:15 AM

Interaction	By Phone
Category	<input type="text"/>
Assistance	<input type="text"/>
Refer From	<input type="text"/>
Refer To	<input type="text"/>
Service Units	0
Hours	1
Rate	0
Account	-- Select Account --
Notes	<input type="text"/>

Multi Add - Single Add
Manage List

Type or click Category
What category would this Outreach action fall under?
Example: Are You OK?, Advocacy, Heating Oil

- Are You Ok
- Family Support
- Heating Oil
- Insurance
- Medical

ADD ADD and Open Custom Fields

9 Next you can indicate a specific service

	Sadie Adams 1826 Clark Ave, New Bern, NC	Age: 99 Phone: 252-288-5479 Disability:	Date: 6/16/2023 lock Time: 10:15 AM
Interaction	By Phone	 <p>Multi Add - Single Add</p> <p>Manage List</p> <p>Type or click Assistance What type of assistance was given to the person? Example: hearing aid check, mail information, ...</p> <ul style="list-style-type: none">Cable DiscountElectric DiscountFind A ReferralFood Stamp ApplicationsFuel AssistanceHouseholdOTHPhone Discount	
Category	Family Support		
Assistance			
Refer From			
Refer To			
Service Units	0		
Hours	1		
Rate	0		
Account	-- Select Account --		
Notes			
<input type="button" value="ADD"/> <input type="button" value="ADD and Open Custom Fields"/>			

10 Next you can indicate a specific service

	Sadie Adams 1826 Clark Ave, New Bern, NC	Age: 99 Phone: 252-288-5479 Disability:	Date: 6/16/2023 lock Time: 10:15 AM
Interaction	By Phone	 <p>Multi Add - Single Add</p> <p>Manage List</p> <p>Type or click Assistance What type of assistance was given to the person? Example: hearing aid check, mail information, ...</p> <ul style="list-style-type: none">Cable DiscountElectric DiscountFind A ReferralFood Stamp ApplicationsFuel AssistanceHouseholdOTHPhone Discount	
Category	Family Support		
Assistance			
Refer From			
Refer To			
Service Units	0		
Hours	1		
Rate	0		
Account	-- Select Account --		
Notes			
<input type="button" value="ADD"/> <input type="button" value="ADD and Open Custom Fields"/>			

11 Next you can indicate if they were referred to you

ter.net/Legacy/manage_outreach_add.asp?SeniorID=100002

Sadie Adams
1826 Clark Ave,
New Bern, NC

Age: 99
Phone: 252-288-5479
Disability:

Date: 6/16/2023 lock
Time: 10:15 AM

Interaction	By Phone
Category Edit	Family Support
Assistance Edit	Fuel Assistance
Refer From	<input type="text"/>
Refer To	<input type="text"/>
Service Units	0
Hours	1
Rate	0
Account	-- Select Account --
Notes	<input type="text"/>

ADD ADD and Open Custom Fields

Manage List

Type or click Referral From

Who has referred this person to you?
Example: WestTown Senior Center, Elderly Service Agency, Fred

Doctor Family Social Services

12 Next you can indicate if they were referred to you

ter.net/Legacy/manage_outreach_add.asp?SeniorID=100002

Sadie Adams
1826 Clark Ave,
New Bern, NC

Age: 99
Phone: 252-288-5479
Disability:

Date: 6/16/2023 lock
Time: 10:15 AM

Interaction	By Phone
Category Edit	Family Support
Assistance Edit	Fuel Assistance
Refer From	<input type="text"/>
Refer To	<input type="text"/>
Service Units	0
Hours	1
Rate	0
Account	-- Select Account --
Notes	<input type="text"/>

ADD ADD and Open Custom Fields

Manage List

Type or click Referral From

Who has referred this person to you?
Example: WestTown Senior Center, Elderly Service Agency, Fred

Doctor Family Social Services

13 You can also indicate if you are referring them to someone else

ter.net/Legacy/manage_outreach_add.asp?SeniorID=100002

Sadie Adams
1826 Clark Ave,
New Bern, NC

Age: 99
Phone: 252-288-5479
Disability:

Date: 6/16/2023 lock
Time: 10:15 AM

Interaction	By Phone
Category Edit	Family Support
Assistance Edit	Fuel Assistance
Refer From	Family
Refer To	<input type="text"/>
Service Units	0
Hours	1
Rate	0
Account	-- Select Account --
Notes	<input type="text"/>

ADD ADD and Open Custom Fields

Manage List

Type or click Referral To
Who did you refer this person to?
Example: WestTown Senior Center, Elderly Service Agency, Fred

MOW Senior Center VNA

14 You can also indicate if you are referring them to someone else

ter.net/Legacy/manage_outreach_add.asp?SeniorID=100002

Sadie Adams
1826 Clark Ave,
New Bern, NC

Age: 99
Phone: 252-288-5479
Disability:

Date: 6/16/2023 lock
Time: 10:15 AM

Interaction	By Phone
Category Edit	Family Support
Assistance Edit	Fuel Assistance
Refer From	Family
Refer To	<input type="text"/>
Service Units	0
Hours	1
Rate	0
Account	-- Select Account --
Notes	<input type="text"/>

ADD ADD and Open Custom Fields

Manage List

Type or click Referral To
Who did you refer this person to?
Example: WestTown Senior Center, Elderly Service Agency, Fred

MOW Senior Center VNA

15

UNITS:

Some centers have a grading system in which they have to assign a certain amount of unit to an interaction based on a number of factors. Although this is one interaction, you can enter as many units as you want. Then, in statistics, you can not only see how many interactions for a date range but you can also get a total number of units.

HOURS:

Here you can also track how much time you have spent with a person and pull totals within statistics. Hours are entered as decimals. For example, fifteen minutes would be enter as .25.

RATE (Optional Field that is turned on under preferences):

Some centers do have an hourly rate they need to apply and from that they can generate invoices.

ACCOUNT (Optional Field that is turned on under preferences):

You can choose which payments received account the rate is be allocated to.

NOTES:

You can enter any notes you like.

New Bern, NC Disability: Time 10:15 AM

Interaction	By Phone
Category <small>Edit</small>	Family Support
Assistance <small>Edit</small>	Fuel Assistance
Refer From	Family
Refer To	Senior Center
Service Units	0
Hours	1
Rate	0
Account	-- Select Account --
Notes	my notes

(Optional) Type Notes
Example: Grant form info, payment info, grumpiness
Now click the ADD Button

ADD ADD and Open Custom Fields

16

UNITS:

Some centers have a grading system in which they have to assign a certain amount of unit to an interaction based on a number of factors. Although this is one interaction, you can enter as many units as you want. Then, in statistics, you can not only see how many interactions for a date range but you can also get a total number of units.

HOURS:

Here you can also track how much time you have spent with a person and pull totals within statistics. Hours are entered as decimals. For example, fifteen minutes would be enter as .25.

RATE (Optional Field that is turned on under preferences):

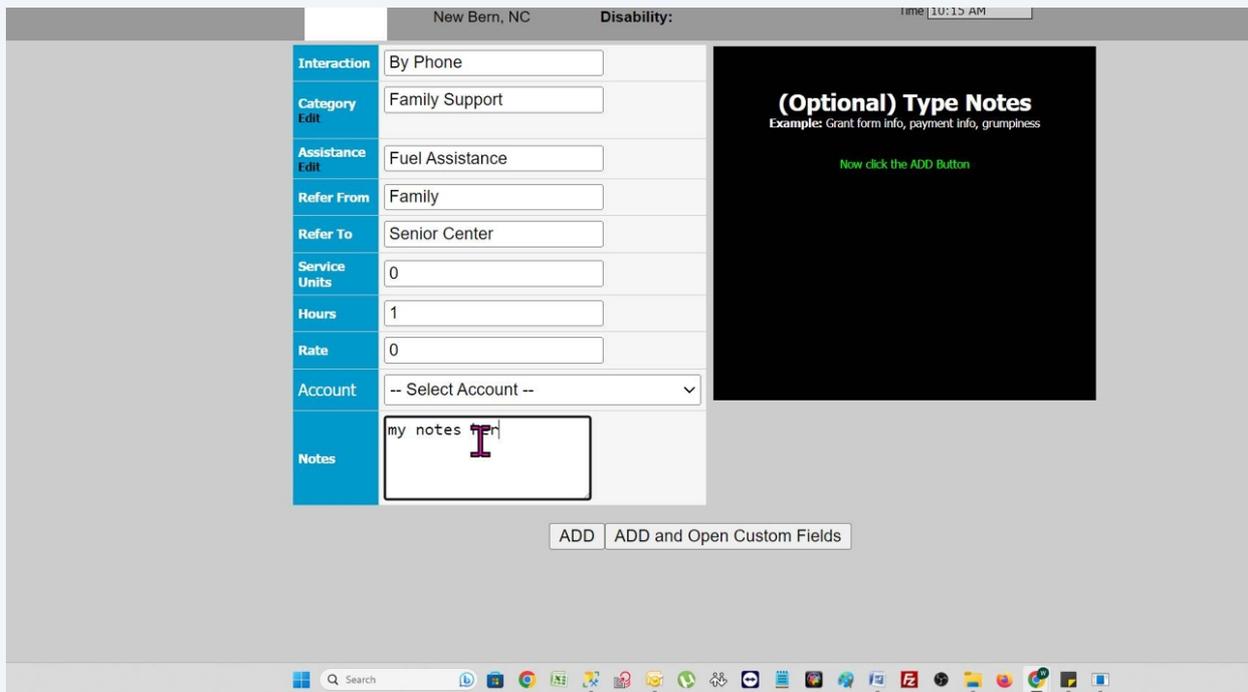
Some centers do have an hourly rate they need to apply and from that they can generate invoices.

ACCOUNT (Optional Field that is turned on under preferences):

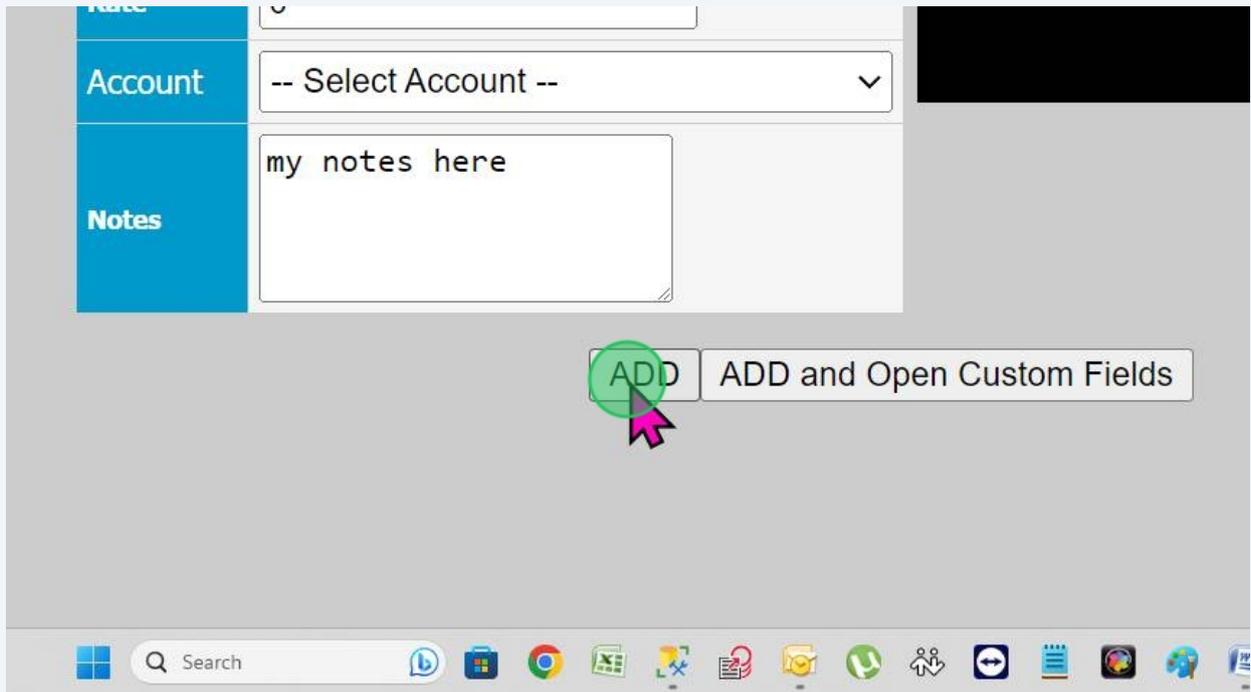
You can choose which payments received account the rate is be allocated to.

NOTES:

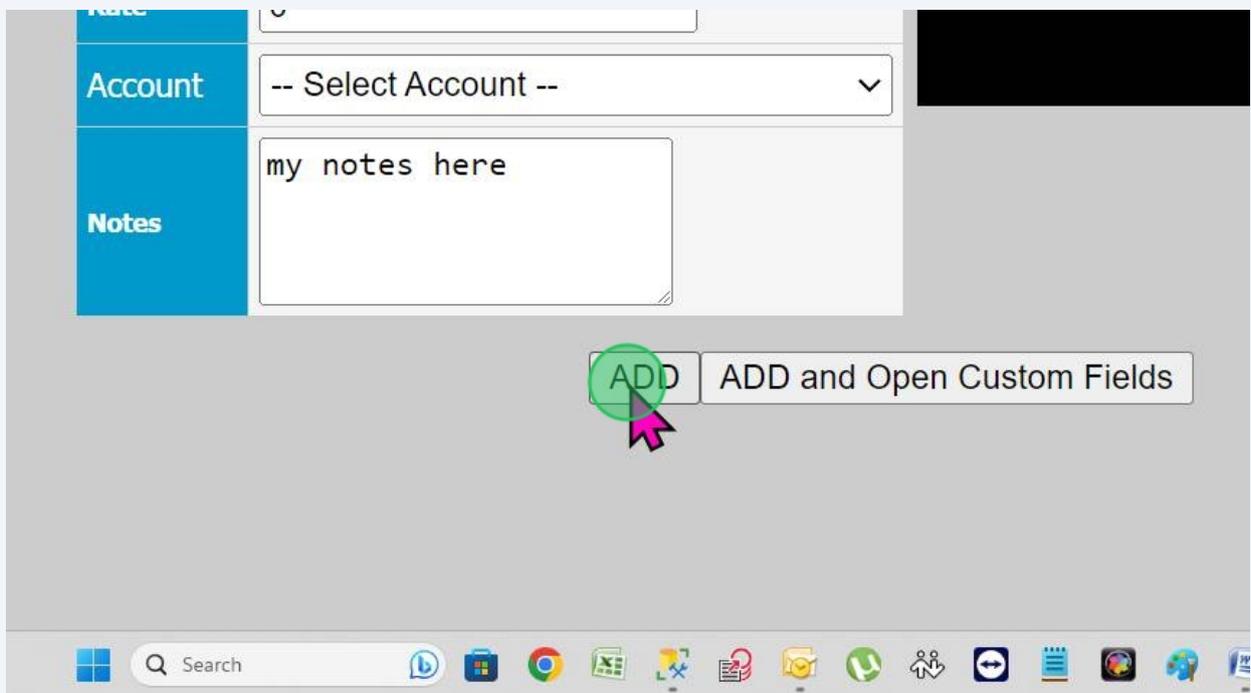
You can enter any notes you like.



17 Click "Add" to save the record.

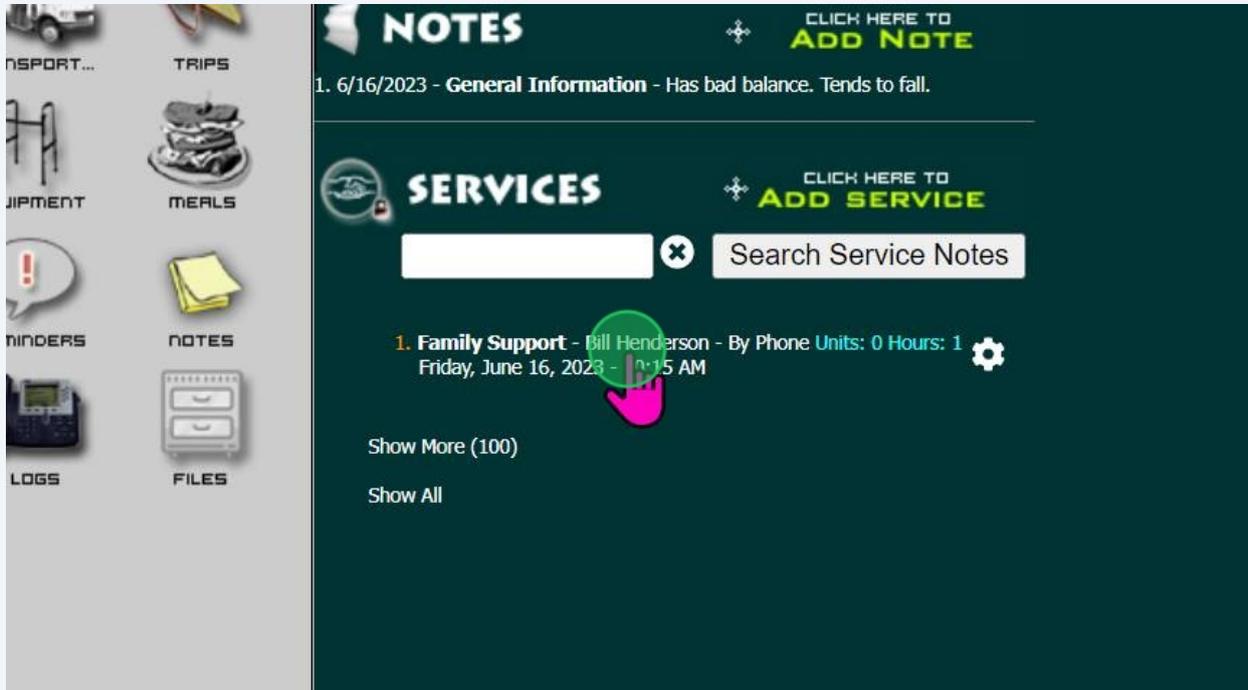


18 Click "Add" to save the record.



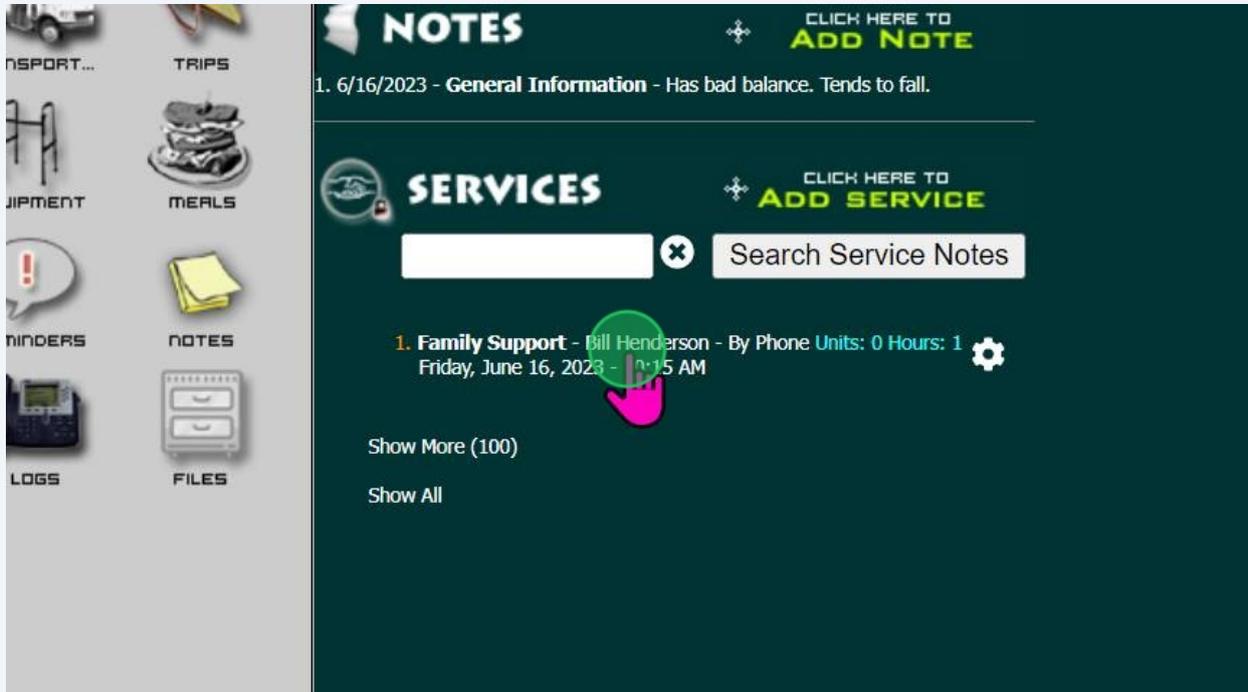
19

Now we can see that record listed there along with your name (the creator) and the date and time. Service records are sorted by date. The recent record is listed at the top. The search box shows up once you create the first record so once you have a long history of records you can easily search for specific records. Click directly on the record.



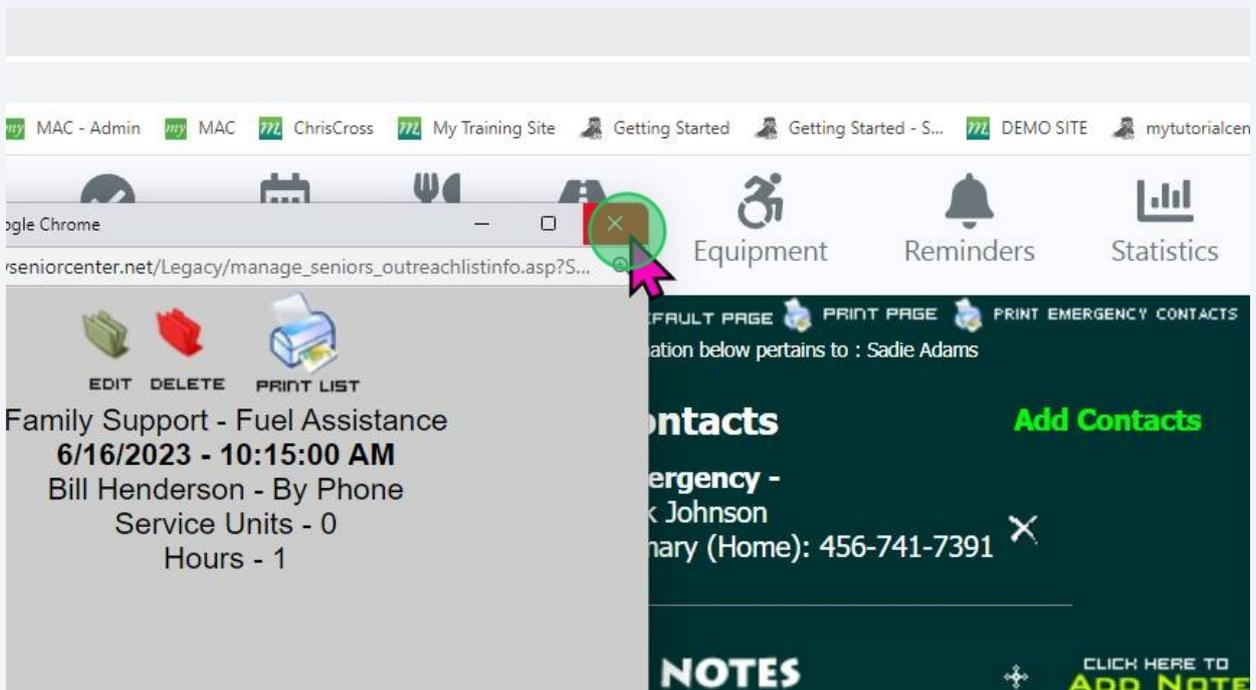
20

Now we can see that record listed there along with your name (the creator) and the date and time. Service records are sorted by date. The recent record is listed at the top. The search box shows up once you create the first record so once you have a long history of records you can easily search for specific records. Click directly on the record.



21

Here you can see all the details for the record. You can also see the edit, delete and print buttons. Close the window.



22

Here you can see all the details for the record. You can also see the edit, delete and print buttons. Close the window.

