Outreach/Services



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"



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Click "Add Service"

Mgc. 33	Information below pertains to : Sadie Adams	
	Contacts	Add Contacts
REY CUSTOM FILE INFO	Emergency - Jack Johnson Primary (Home): 456-741-7391	×
IGS FILES		

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.

× iter.net/Legacy/manage_outreach_add.asp?SeniorID=100002 Q 15 Age: 99 Phone: 252-288-5479 Disability: MAC MAC ChrisCross 抗 My Training Site 🛛 🐊 Getting Star s ve, C lock Date 6/16/2023 Time 10:15 AM 41 2 A ::: Rides Personnel Events Meals Equip ң Manage List Type or click Interaction adie L Adams Age: 99 📎 DEFAULT PA Where / How did you help this person? Example: Phone Consultation, Home Consultation 826 Clark Ave, mation held Vew Bern, NC 28540 52-288-5479 Contac At Home By Phone Office Visit Emergenc Jack Johnso R AX TIUNTE Primary (Ho CUSTOM FILE INFO THE OTHER NOT 6/16/2023 - G ~ SEI

Expand the Window

4

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Expand the Window

(i) 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.

s ve, C	Age: 99 Phone: 252-288-5479 Disability:	Date 6/16/2023 lock
		<section-header><section-header><section-header><section-header><section-header><section-header><text></text></section-header></section-header></section-header></section-header></section-header></section-header>

cy/manage_outread	h_add.asp?SeniorID	=100002			
		Sadie Adams 1826 Clark Ave, New Bern, NC	Age: 99 Phone: 252-288-5479 Disability:	Date 6/16/2023 0CK	
	Interaction			Manage List	
	Category Edit			Type or click Interaction	
	Assistance Edit			Example: Phone Consultation, Home Consultation	
	Refer From			At Home By Phone	
	Refer To			Office	
	Service Units	0			
	Hours	1			
	Rate	0			
	Account	Select Account	~		
	Notes				
			ADD ADD and Open C	ustom Fields	

nanage_ou	rtreach_add.asp?SeniorID	=100002			-
		Sadie Adams 1826 Clark Ave, New Bern, NC	Age: 99 Phone: 252-288-547 Disability:	9 Date 6/16/2023 lock Time 10:15 AM	
	Interaction			Manage List	
	Category Edit				
	Assistance Edit			Example: Phone Consultation, Home Consultation	
	Refer From			At Home By Phone	
	Refer To			Office	
	Service Units	0			
	Hours	1			
	Rate	0			
	Account	Select Account	~		
	Notes				
			ADD and Open (Custom Fields	

7 Next you'll categorize the interaction.

r.net/Legacy/manage_outreach_add.asp7Senior	D=100002 Sadie Adams 1826 Clark Ave, New Bern, NC	Age: 99 Phone: 252-288-5479 Disability: Di	0
Interaction	By Phone	Multi Add - Single Add	
Category Edit		Manage List	
Assistance		Type or click Category What category would this Outreach action fall under?	
Refer From		Example: Are You Ok?, Advocacy, Heating Oil	
Refer To		Family Support	
Service Units	0	Insurance Medical	
Hours	1		
Rate	0		
Account	Select Account	~	
Notes			
	AD	ADD and Open Custom Fields	

8 Next you'll categorize the interaction. - 0 × Q Sadie Adams 1826 Clark Ave, New Bern, NC Age: 99 Phone: 252-288-5479 Disability: Date 6/16/2023 lock Time 10:15 AM By Phone Interaction Multi Add - Single Add ң Manage List Category Type or click Category stance Refer From Refer To Service Units 0 1 0 -- Select Account --~ Notes ADD ADD and Open Custom Fields

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 [OCK Time 10:15 AM	
Interaction	By Phone		Multi Add - Single Add	
Category Edit	Family Support		Manage List	
Assistance Edit			Type or click Assistance	
Refer From			What type of assistance was given to the person? Example: hearing aid check, mail information,	
Refer To			Cable Discount Electric Discount	
Service Units	0		Find A Referral Food Starnp Applications	
Hours	1		House	
Rate	0		OTHER Phone Discount	
Account	Select Account	~		
Notes				
	AD	D ADD and Open Cus	tom Fields	

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		Multi Add - Single Add	
Category Edit	Family Support		Manage List	
Assistance Edit			Type or click Assistance	
Refer From			Example: hearing aid check, mail information,	
Refer To			Cable Discount Electric Discount	
Service Units	0		Find A Referral Food Stamp Applications	
Hours	1		Fuel Assistance Housing	
Rate	0		OTHER Phone Discount	
Account	Select Account	~		
Notes				
	A	DD ADD and Open Cus	stom Fields	

cy/manage_outreach_a	dd.asp?SeniorID	=100002	Amo: 00				
		1826 Clark Ave, New Bern, NC	Phone: 252-288-5479 Disability:	9	Date 6/16/2023 lock Time 10:15 AM		
Ir	nteraction	By Phone		•	Manage List		
C: Ec	ategory dit	Family Support		Type or cli	ck Referral From		
As Ec	ssistance dit	Fuel Assistance		Example: WestTown Ser	or Center, Elderly Service Agency, Fred		
R	efer From				Doctor Family		
R	efer To			So	ial Surfices		
Se	ervice nits	0					
н	ours	1					
R	ate	0					
A	ccount	Select Account	~				
N	otes						
		A	DD ADD and Open C	ustom Fields			

Next you can indicate if they were referred to you

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	Sadie Adams 1826 Clark Ave, New Bern, NC	Age: 99 Date 6/16/2023 lock Phone: 252-288-5479 Time 10:15 AM Disability: Time 10:15 AM	
Interaction	By Phone	Control Manage List	
Category Edit	Family Support		
Assistance Edit	Fuel Assistance	Example: WestTown Senior Center, Elderly Service Agency, Fred	
Refer From		(Doctor Family)	
Refer To		Social Surfices	
Service Units	0		
Hours	1		
Rate	0		
Account	Select Account	✓	
Notes			
	А	ADD ADD and Open Custom Fields	

13	You can also indica	te if you are	referring the	m to someone	e else
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.ter.net/Legacy/manage_outreach	h_add.asp?SeniorID	=100002		- 0	× Q
		Sadie Adams 1826 Clark Ave, New Bern, NC	Age: 99 Date [6/16/2023] lock Phone: 252-288-5479 Time [0:15 AM] Disability: Time 10:15 AM]		
	Interaction	By Phone	Manage List		
	Category Edit	Family Support	Type or click Referral To		
	Assistance Edit	Fuel Assistance	Example: WestTown Senior Center, Elderly Service Agency, Fred		
	Refer From	Family	MOW Senior Center		
	Refer To				
	Service Units	0			
	Hours	1			
	Rate	0			
	Account	Select Account	▼		
	Notes				
			ADD ADD and Open Custom Fields		

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

	Sadie Adams 1826 Clark Ave, New Bern, NC	Age: 99 Phone: 252-288- Disability:	5479	Date 6/16/2023 Time 10:15 AM	lock	
Interaction	By Phone			Manage List		
Category Edit	Family Support		Type o	click Referral 1	Го	
Assistance Edit	Fuel Assistance		Who Example: WestTown	did you refer this person to? Senior Center, Elderly Service Ager	ncy, Fred	
Refer From	Family			MOW Senior Center		
Refer To				VNA		
Service Units	0					
Hours	1					
Rate	0					
Account	Select Account	~				
Notes						
	A	DD ADD and Ope	en Custom Fields]		

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.

Interaction By Phone	
Category Edit Family Support (Optional) Type Notes Example: Grant form info, payment info, grumpiness	
Assistance Fuel Assistance Now click the ADD Button	
Refer From Family	
Refer To Senior Center	
Service 0	
Hours 1	
Rate	
Account Select Account V	
Notes my notes Fr	
ADD ADD and Open Custom Fields	
📕 Q. Search 🕒 🖻 🧔 🔤 🤌 📾 👳 🕔 🎂 🗮 📓 🦧 🖓 💆 💆 🚳 😂 🦉 🕎 💷	

16 UNITS:

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Rate	
Account Select Account V	
Notes my notes Fr	
ADD ADD and Open Custom Fields	
📕 Q. Search 🕒 🖻 🧔 🔤 🤌 📾 👳 🕔 🎂 🗮 📓 🦧 🖓 💆 💆 🚳 😂 🦉 🕎 💷	

Click "Add" to save the record.

	my notes here			-	
Notes					
			ADD and O	pen Cust	om Fields
		NF			

Click "Add" to save the record.



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.

Image: Services Image: Servic		TRIPS	NOTES ADD NOTE 1. 6/16/2023 - General Information - Has bad balance. Tends to fall.
Inders Inters Inders Inters Inters <t< td=""><td></td><td>MERLS</td><td></td></t<>		MERLS	
Friday, June 16, 2028 June 16,			Search Service Notes Family Support - Bill Henderson - By Phone Units: 0 Hours: 1
LDGS FILES Show All			Friday, June 16, 2023 - 5 AM
	LOGS	FILES	Show All

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	TRIPS	NOTES CLICH HERE TO ADD NOTE 1. 6/16/2023 - General Information - Has bad balance. Tends to fall.
	MERLS	
!		Search Service Notes
	NOTES	1. Family Support - Bill Henderson - By Phone Units: 0 Hours: 1 Friday, June 16, 2023 - 5 AM Show More (100)

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



