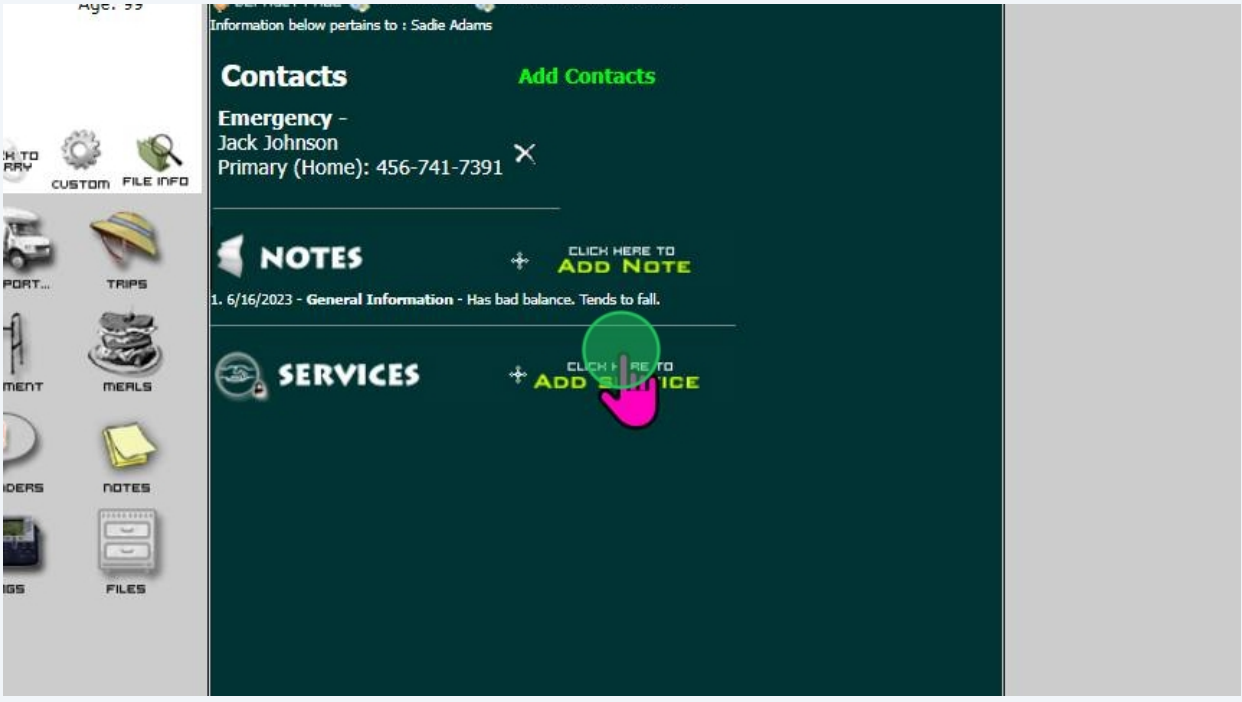
Outreach/Services

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"



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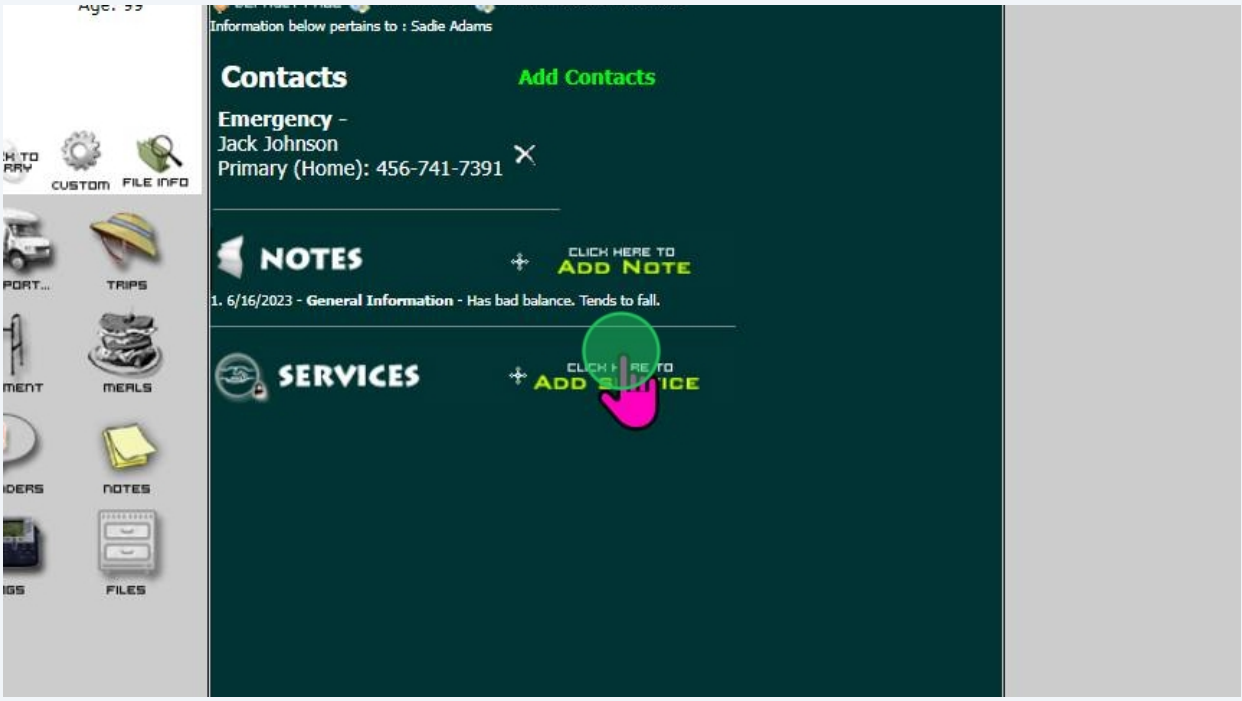
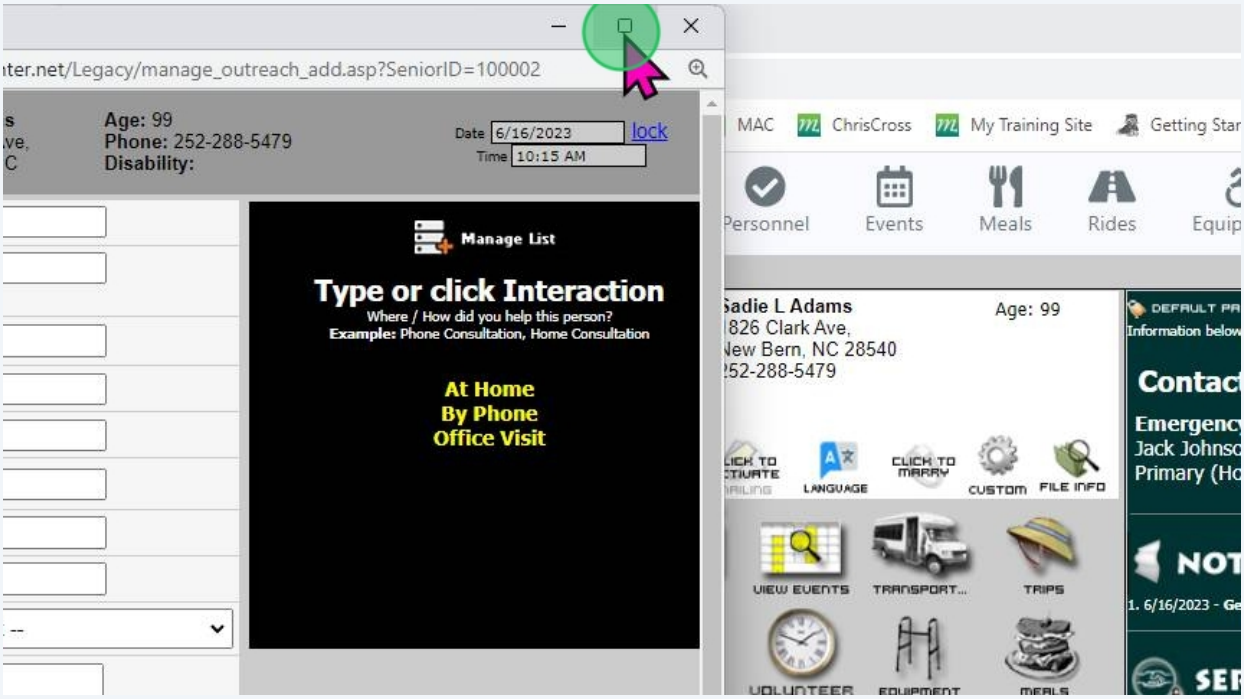


3 Here we're creating a record of a one-on-one interaction that we had with this person on a specific date and time. The date and time will default to the current date and time but you can change those. You can put in past dates, future dates, and anytime that you want. Mostly what you'll be doing is 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



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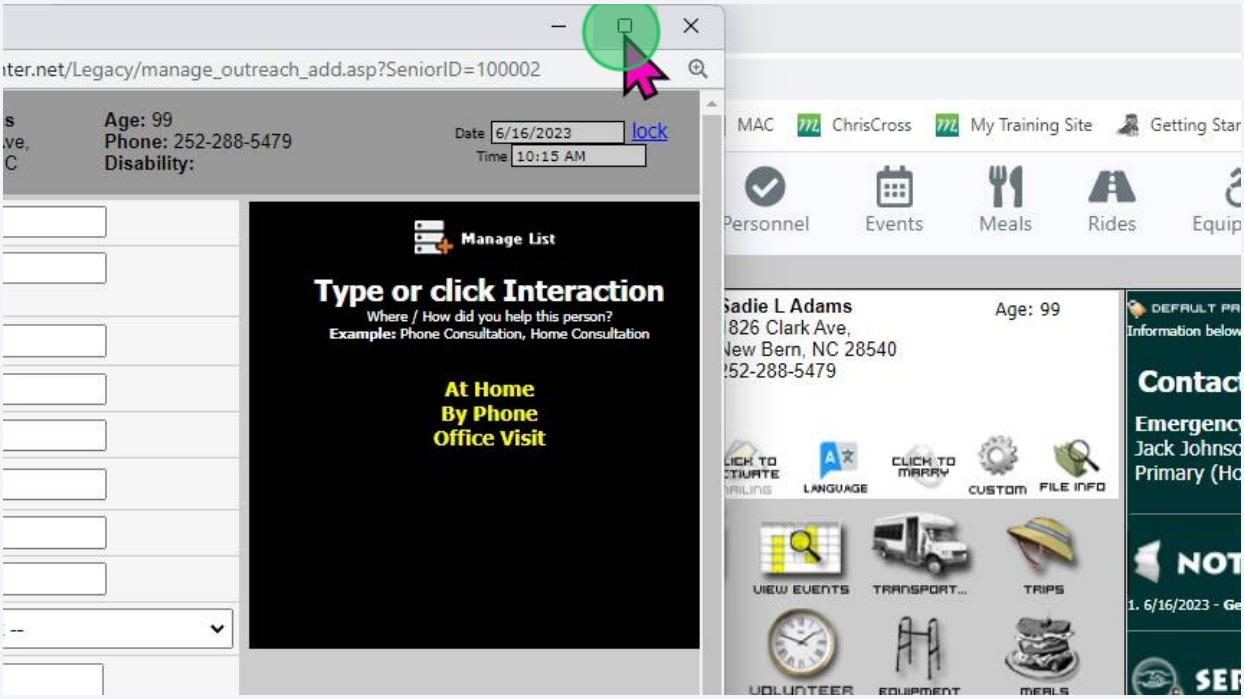
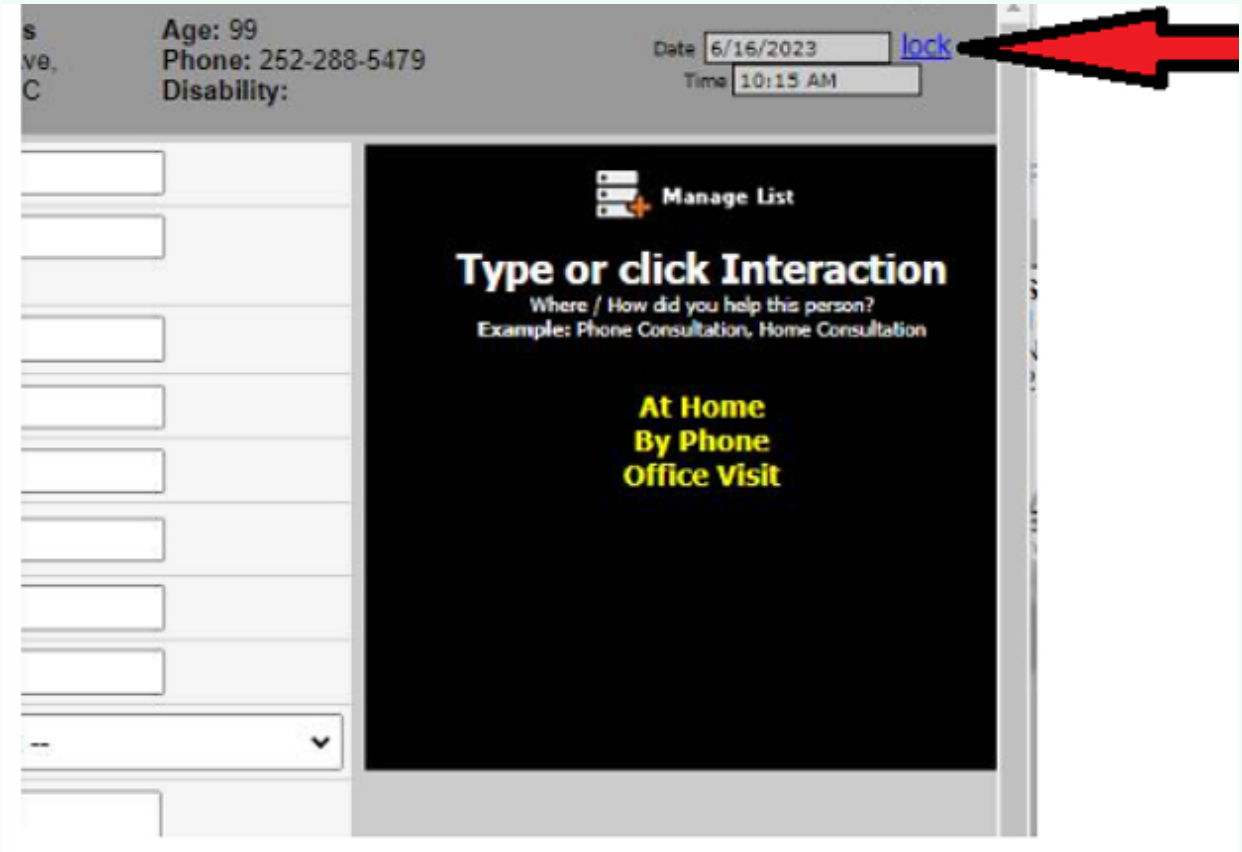
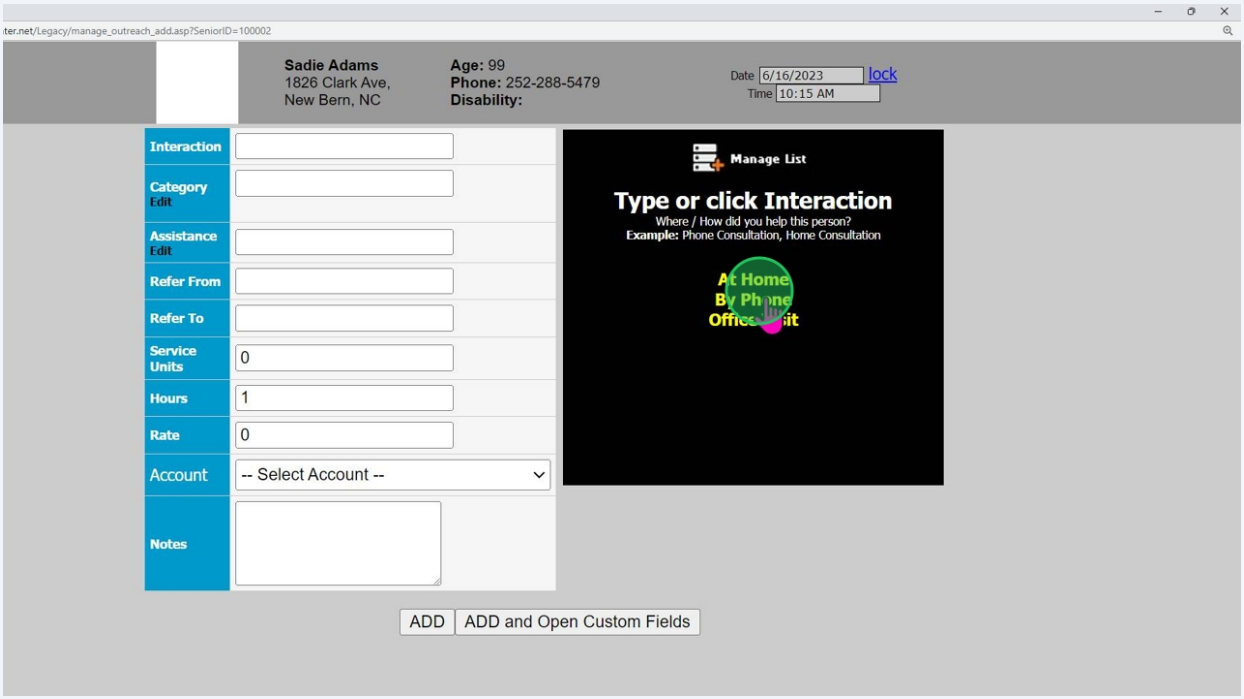


Clicking the "Lock" link to the right of the date will lock the date field to that date.

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.



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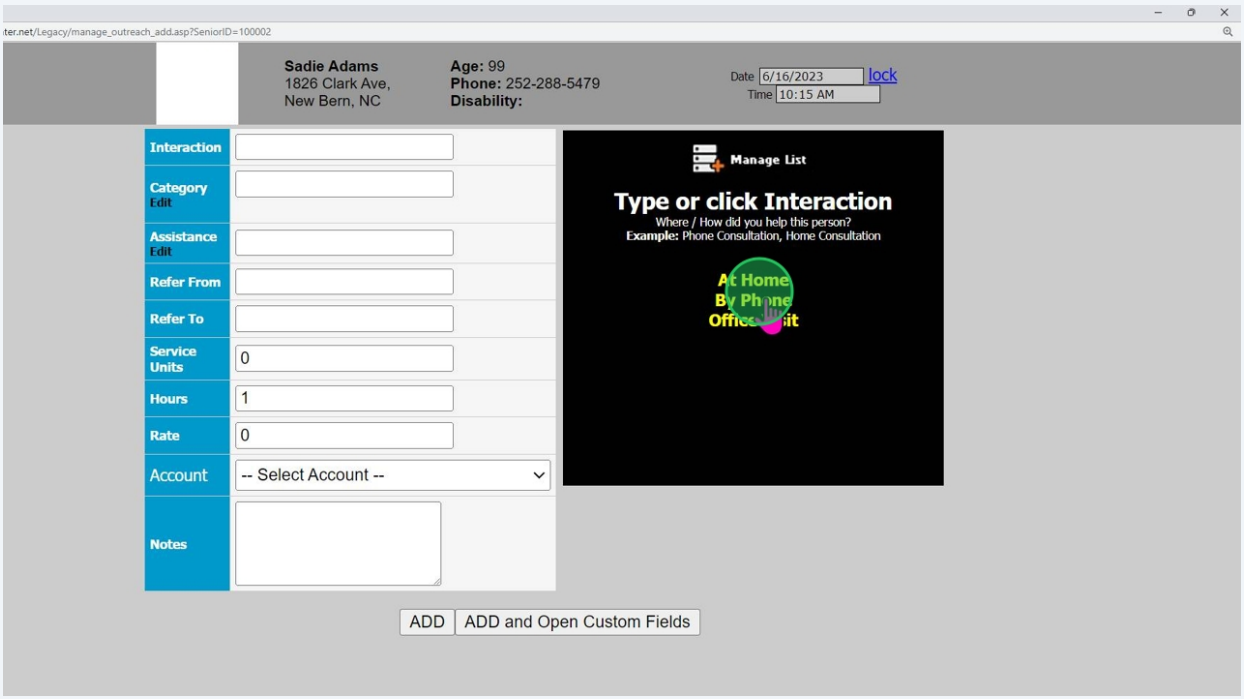
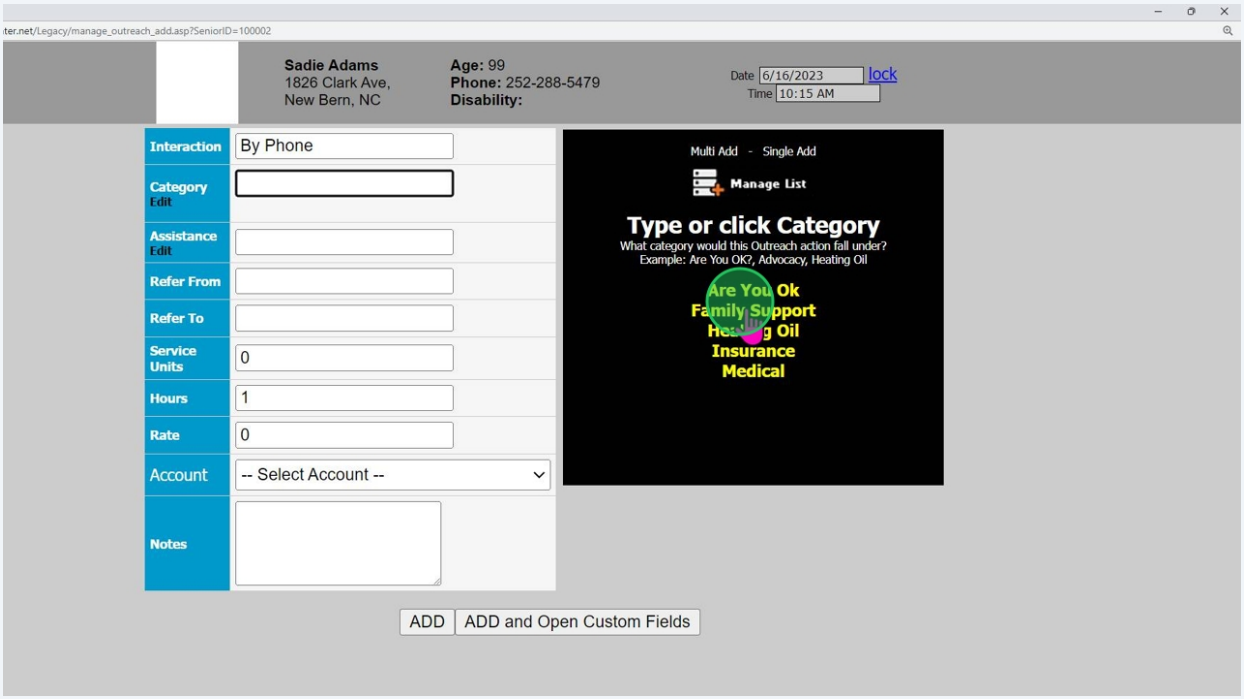


7 Next you'll categorize the interaction.



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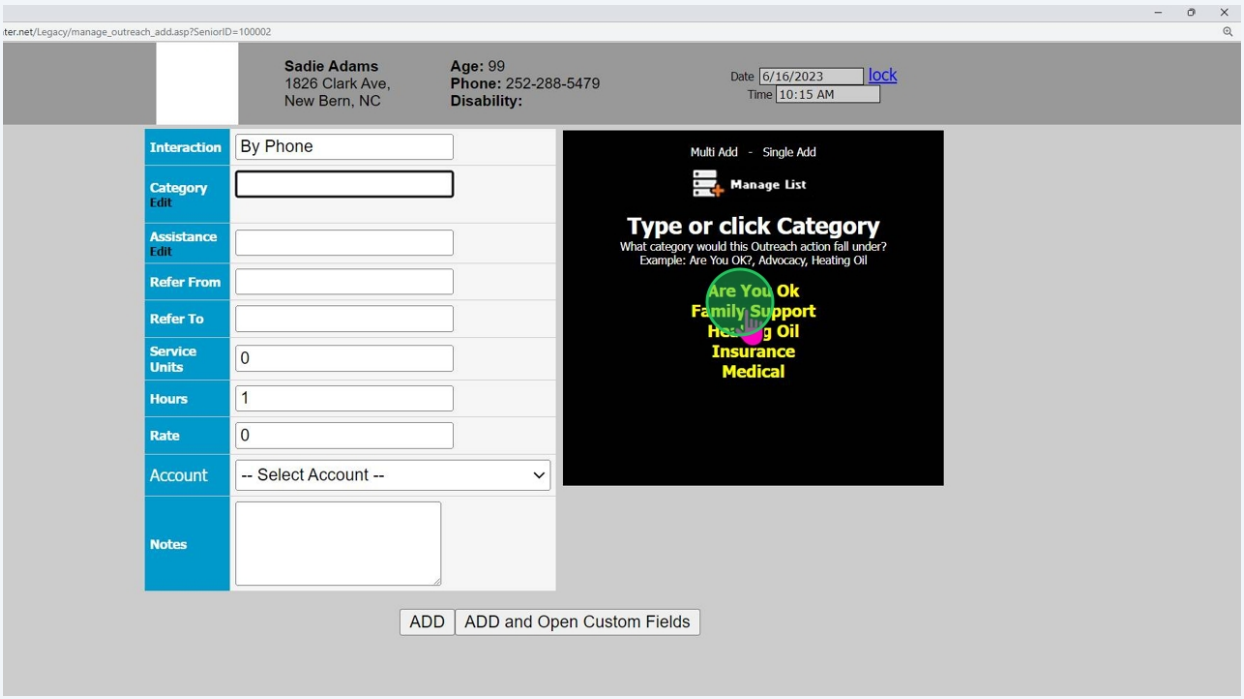
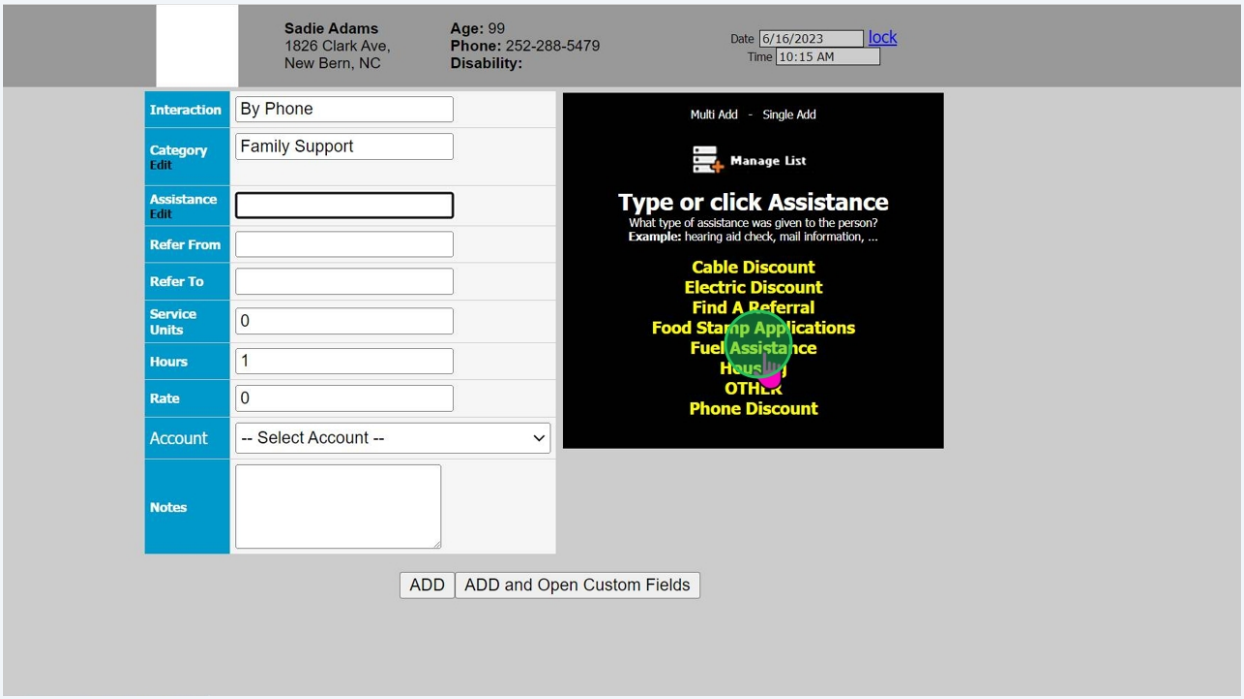


9 Next you can indicate a specific service



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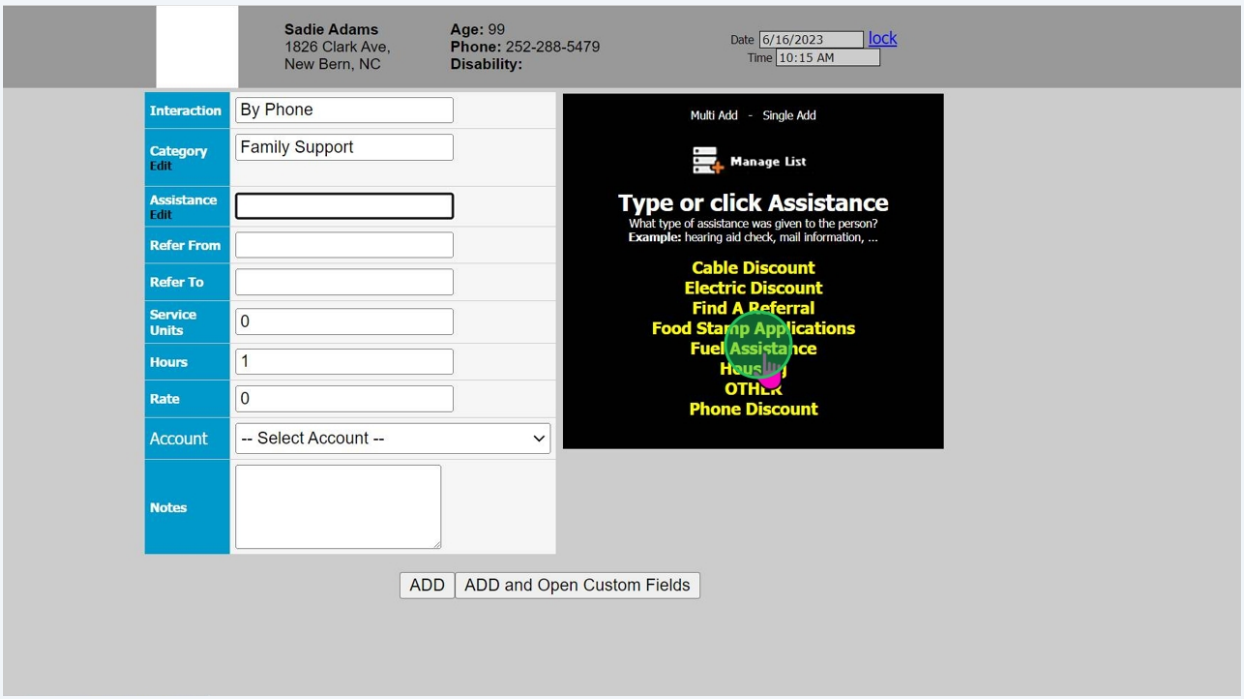
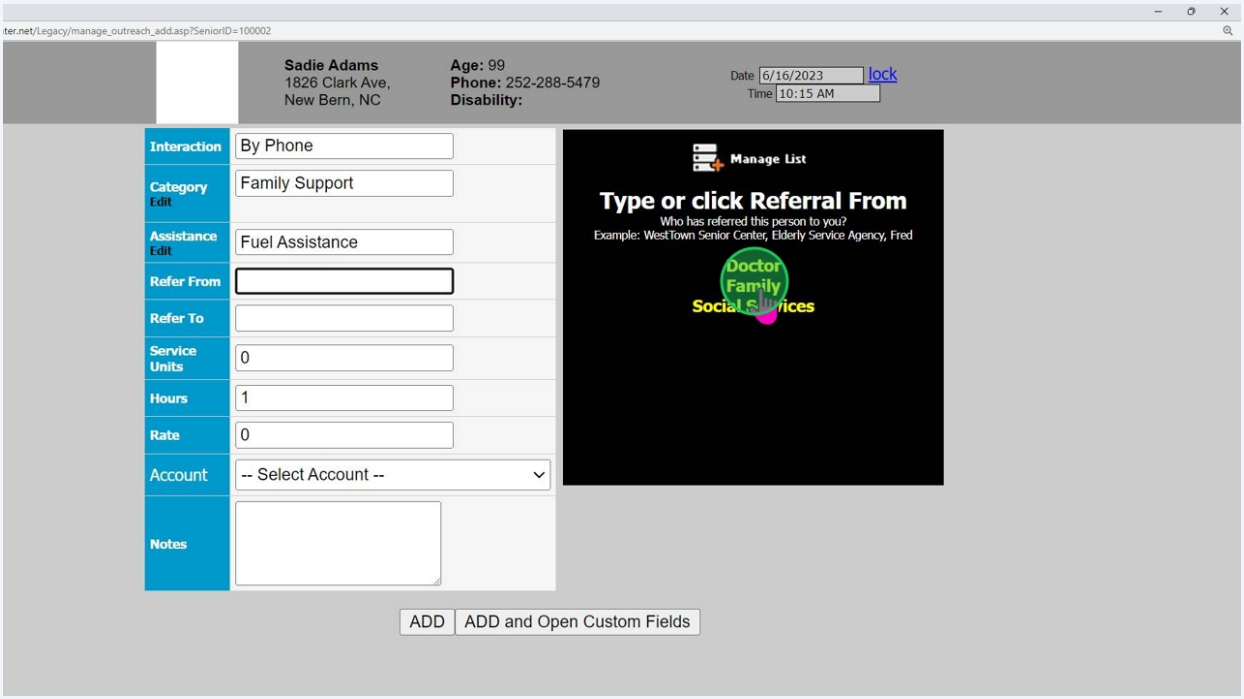


11 Next you can indicate if they were referred to you



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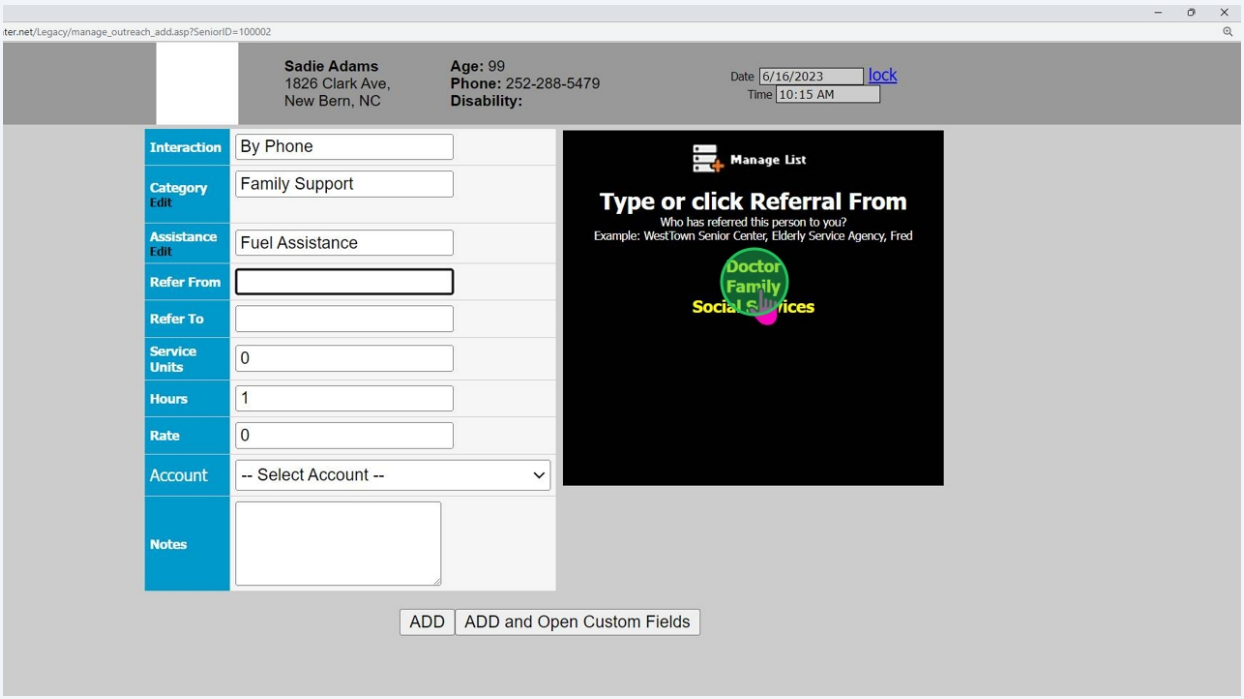
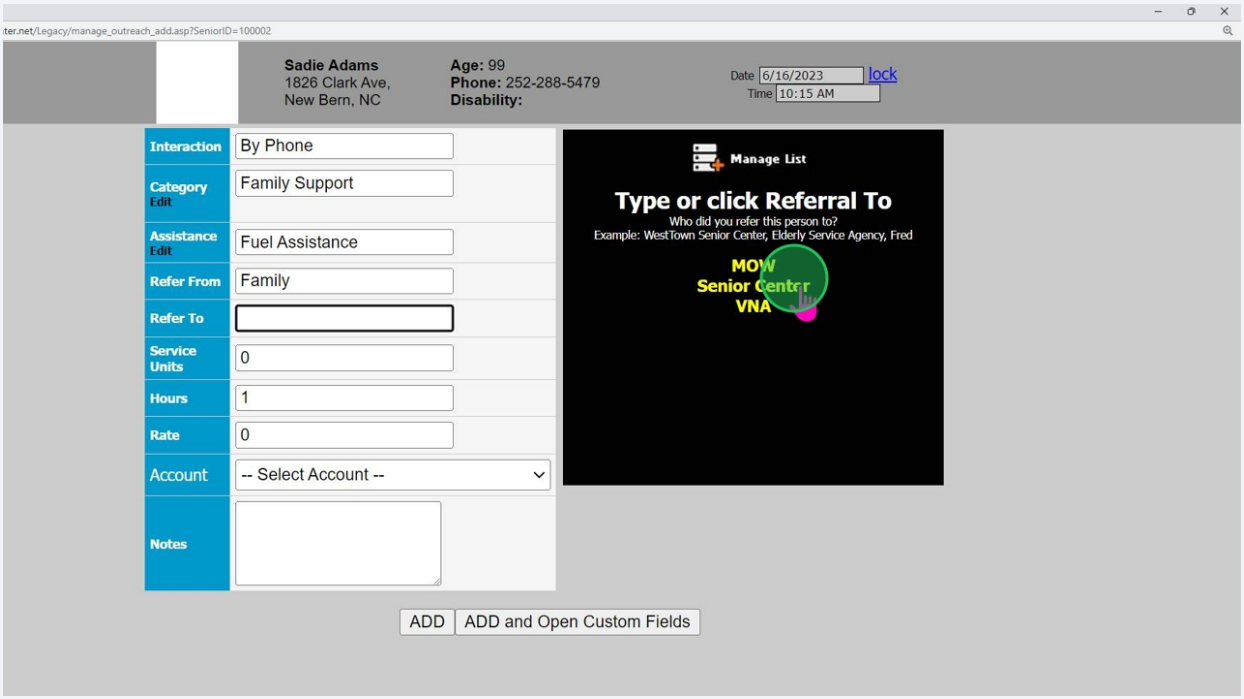


13 You can also indicate if you are referring them to someone else



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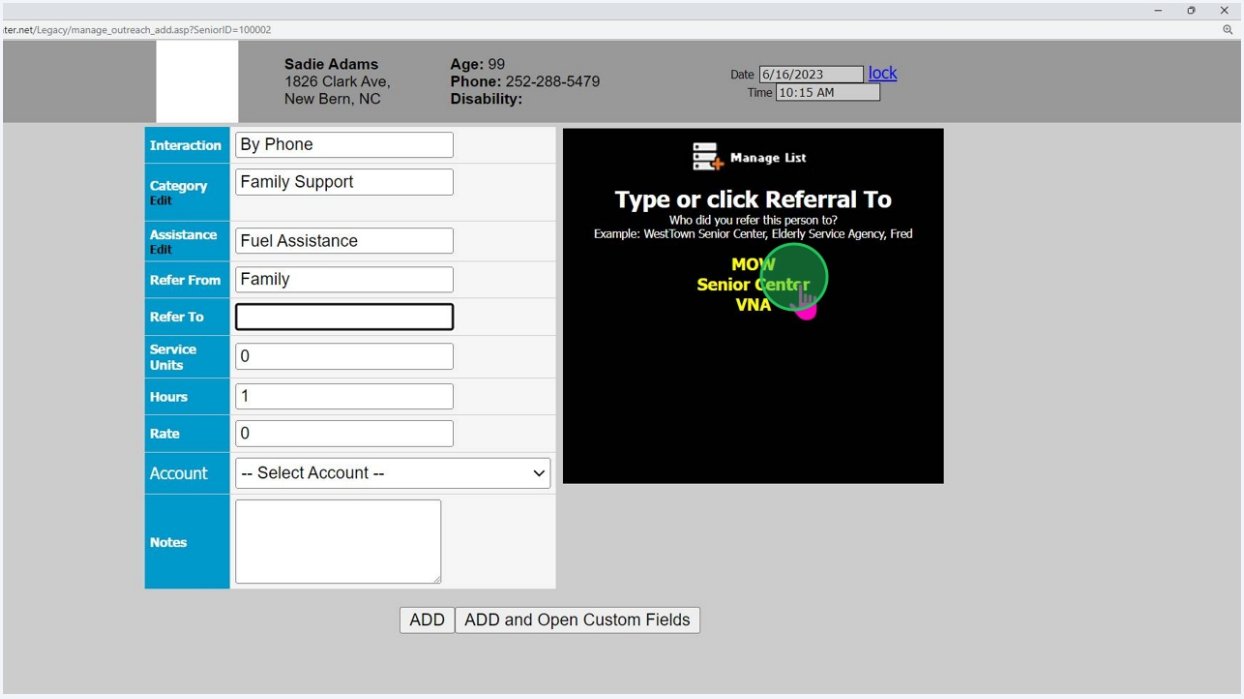


15

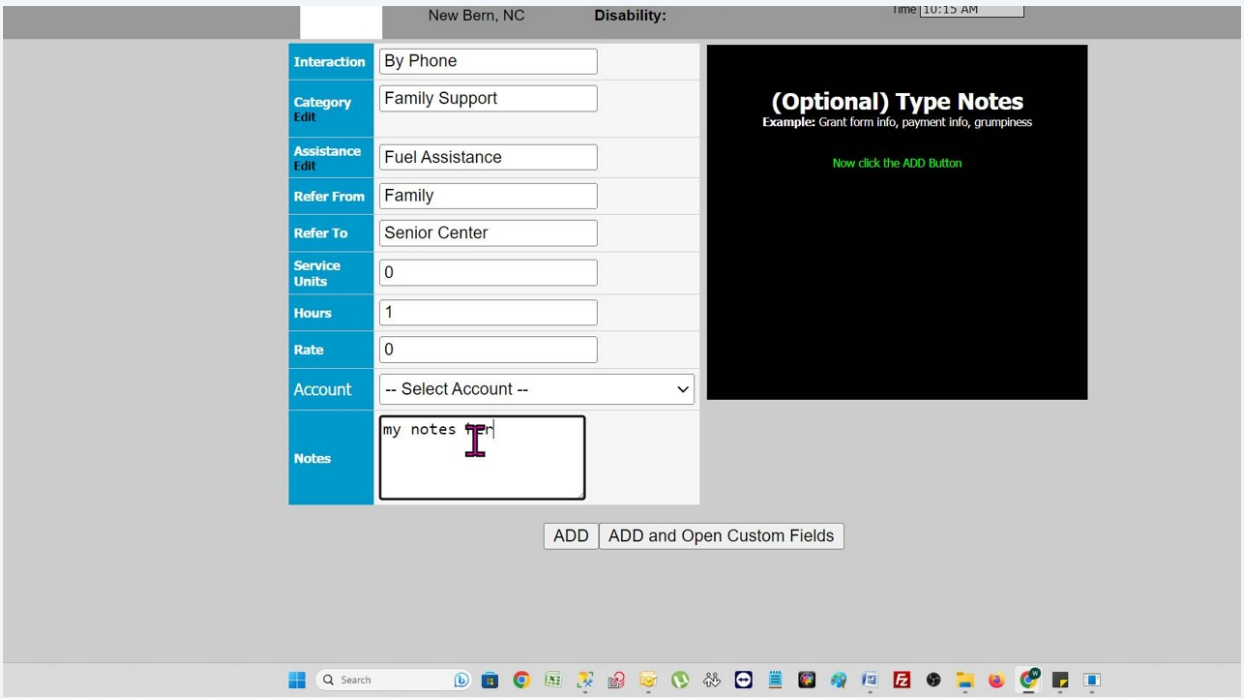
UNITS:
Some centers have a grading system in which they have to assign a certain amount of unit to an interaction based on a number of factors. Although this is one interaction, you can enter as many units as you want. Then, in statistics, you can not only see how many interactions for a date range but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



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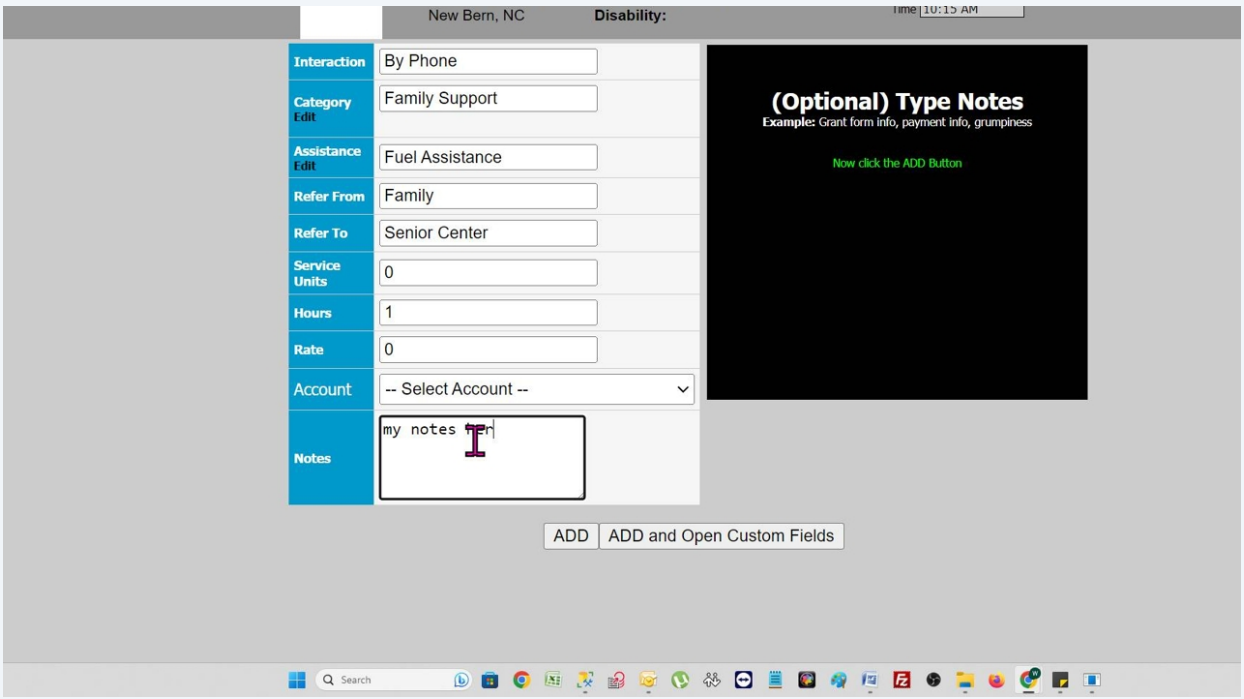
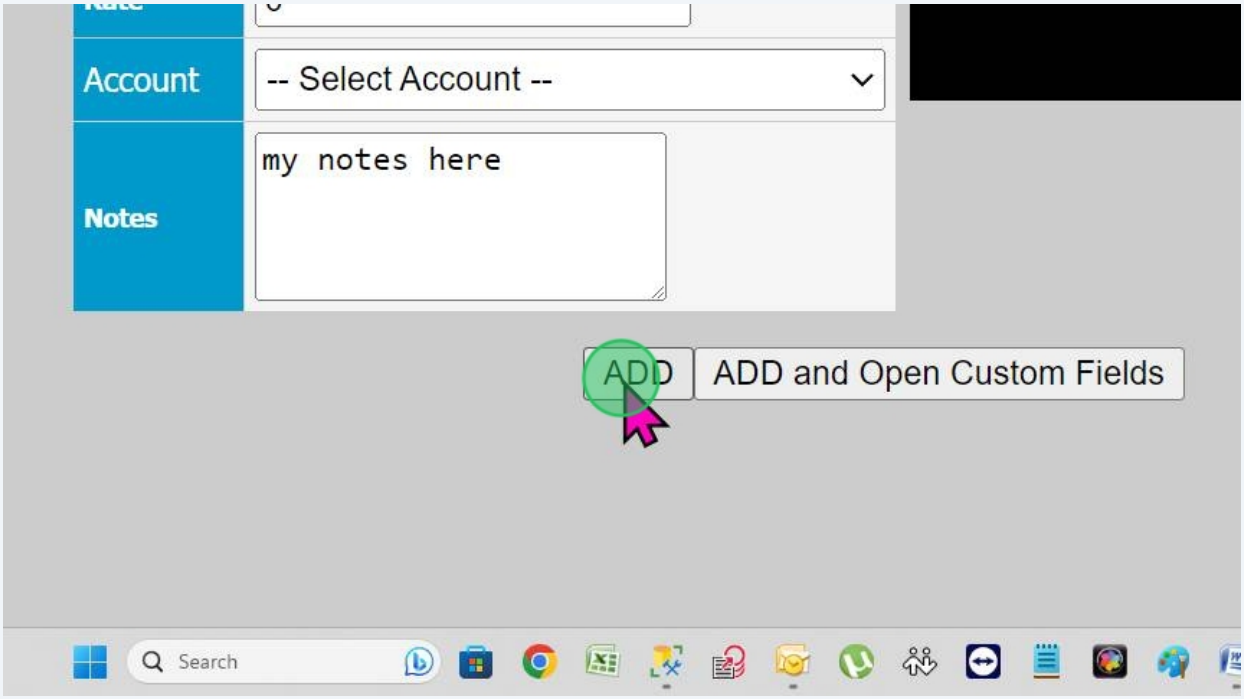


17 Click "Add" to save the record.



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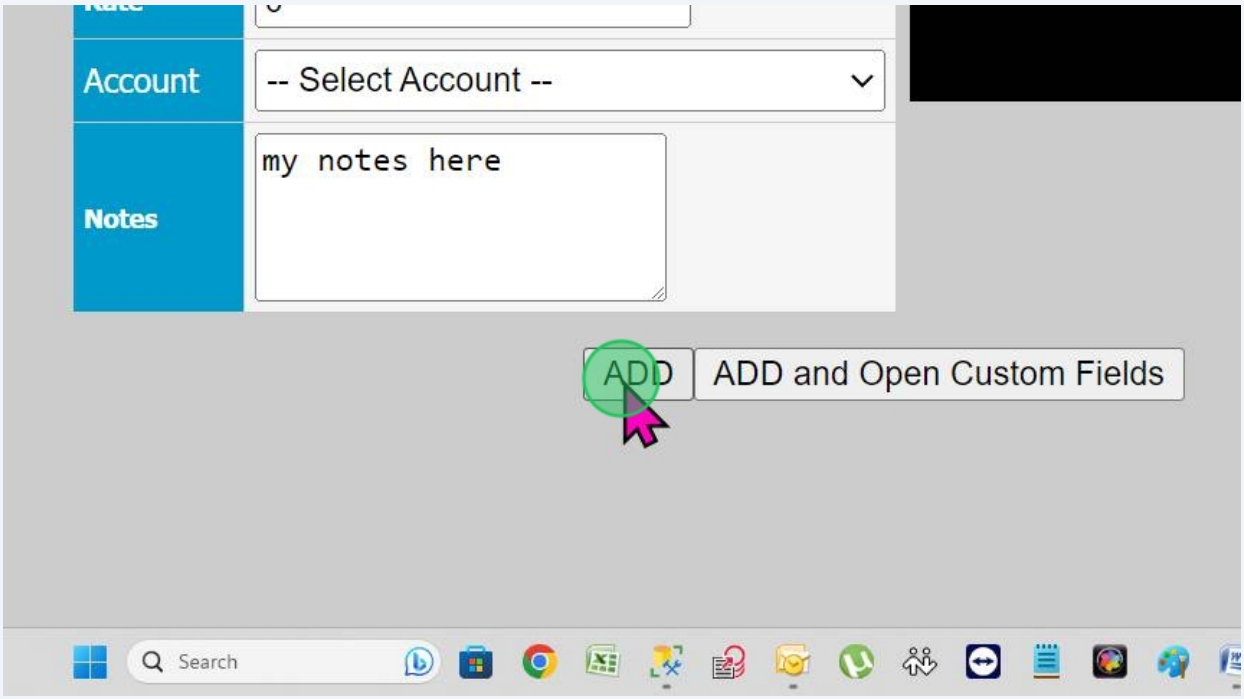
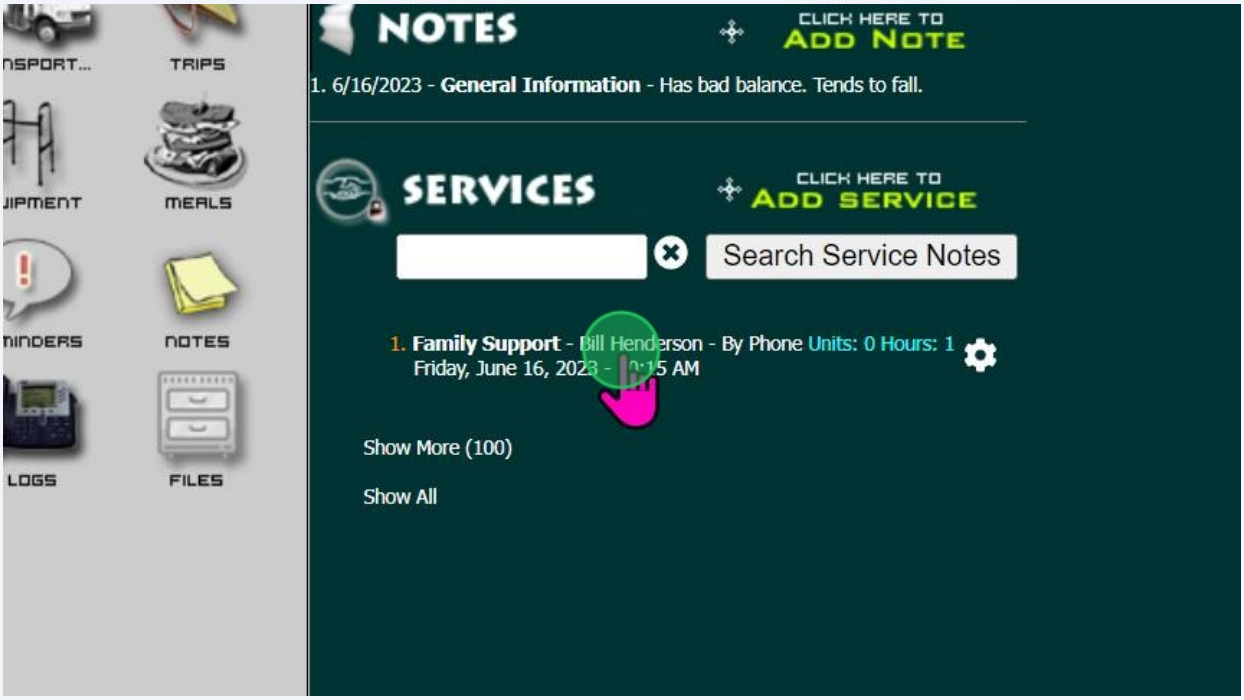


19 Now we can see that record listed there along with your name (the creator) and the date and time. Service records are sorted by date. The recent record is listed at the top. The search box shows up once you create the first record so once you have a long history of records you can easily search for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



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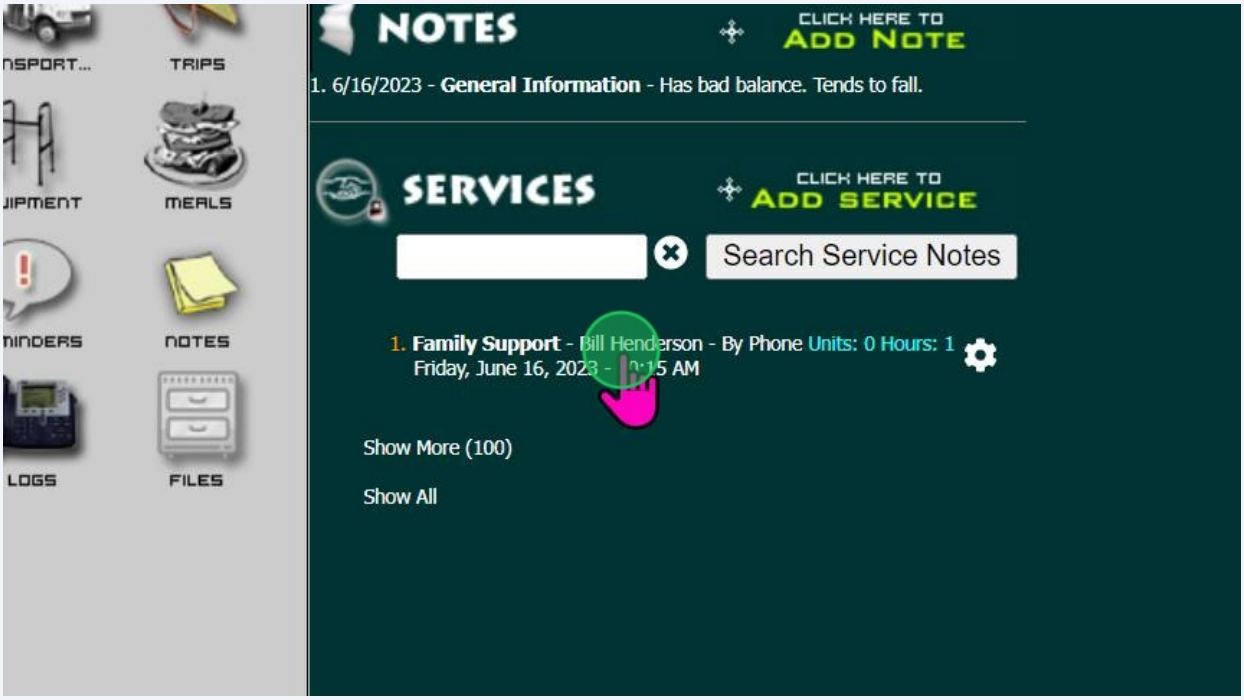
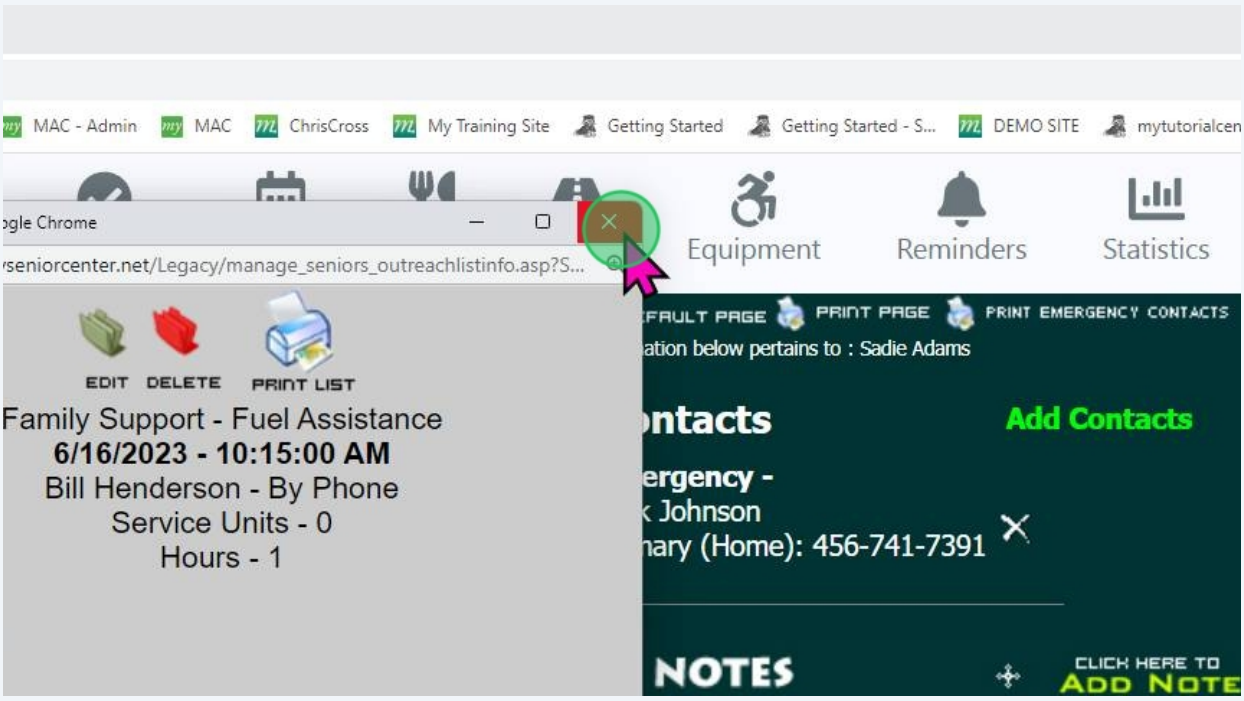
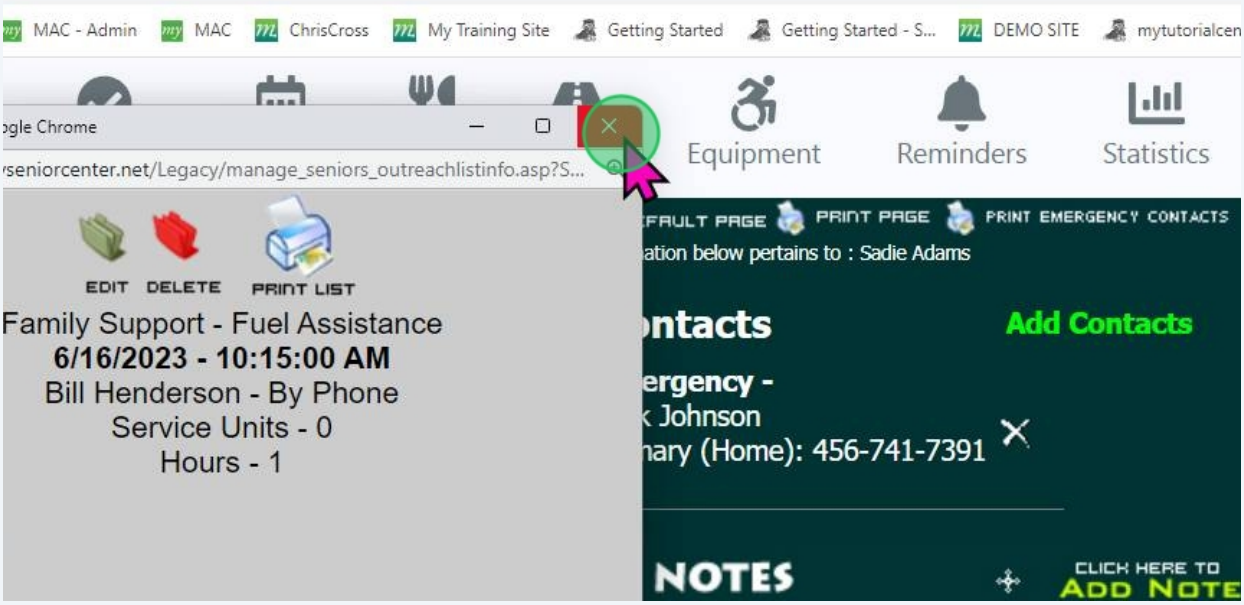


21 Here you can see all the details for the record. You can also see the edit, delete and print buttons.
Close the window.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