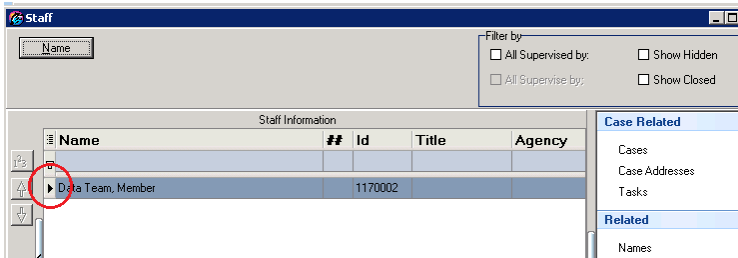


## Quick Steps

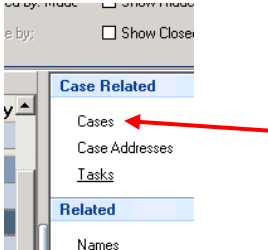
- Open the Case List Screen (if you are not already in it)
- Click on the + Sign to the Left of the Case you are Working on
- Click on the Client you are Entering the Service for
- From the Right Hand Menu Bar, Click on the Client Services Link
- Click the Add Button
- Fill out the Staff Services/Activities Form (all 3 sections)
- Click Save/Add More Service Button
- If Another Service Entry is Needed, Fill out the Staff Services/Activities Form (all 3 sections) and Click Save/ Add More Service Button
- If There is Not Another Service to Enter, Click the Close Button

## Detailed Steps:

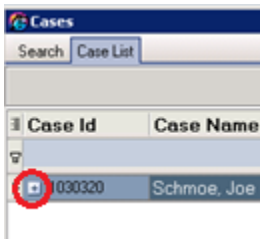
1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.



2. Click on the **Cases** link (on the side menu bar) to get to your open case list.



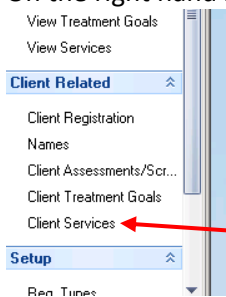
3. From the **Case List** screen, click on the + sign to the left of the case that you want to work on.



- Under the case, click on the client you are entering the service(s) for.

Case Id	Case Name	Open Dt	Close Dt	Void Dt	Create Dt	Update Dt	
1030320	Schmoe, Joe	9/15/2016			9/15/2016 12:00		
Client Id	Client	DOB	Svcs	Role Label	Relationship Label	Eff Dt	Exp Dt
1030320	Schmoe, Joe	1/1/1979	<input checked="" type="checkbox"/>	Mother		9/15/2016	

- On the right hand menu bar, click on the **Client Services** link.



- Click the **Add** button to add a new service.



- The **Staff Services/Activities** window will open.

**Note**, there is no auto-save function. Save your information by clicking **Save/Stay Open** often in case of a power outage or disconnection.

The far left section is logistical information related to the service.

**Staff Services/Activities**

Provider: [ ] [X] [ ]

Staff: 1170002 [X] Data Team, Member

Client Id: 1170028 [X] Doe, Jane

Appointment Date/Time

Start Time: [ ] End Time: [ ]

Service Date: 6/14/2017 Wednesday Units: [ ]

Procedure: [ ] [X] [ ]

Appt. Status: 0 [X] Held

Place of Svc: P08 [X] Office

Funding Information

Fund: [ ] [X] [ ]

Evaluations/Screens

Print Save/Stay Open Save

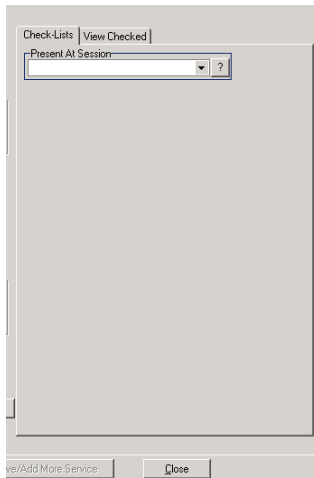
## Billable:

<b>Provider Staff</b>	Use the magnifying glass look up tool to select the provider, select, and click <b>OK</b> . This field will automatically populate. Use the magnifying glass tool to select an option (if necessary), select, and click <b>OK</b> .
<b>Appointment Date/ Time</b>	Type in the start and end times as well as the date of service (Service Date also has a dropdown tool to access a calendar).
<b>Procedure Appt. Status</b>	Use the magnifying glass tool to select a billable procedure, select, and click <b>OK</b> . The database will default the status. Use the magnifying glass tool to select another option as necessary, select, and click <b>OK</b> .
<b>Place of Service</b>	The database will default the place of service. Use the magnifying glass tool to select another option as necessary, select, and click <b>OK</b> .
<b>Fund</b>	Use the magnifying glass tool to select an option for fund information, select, and click <b>OK</b> .

## Non-billable:

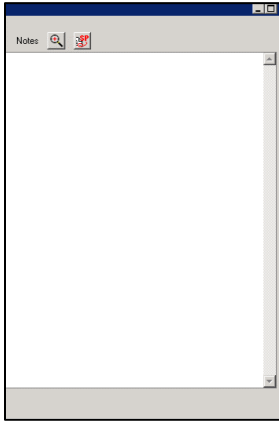
<b>Provider Staff</b>	Use the magnifying glass look up tool to select the provider, select, and click <b>OK</b> . This field will automatically populate. Use the magnifying glass tool to select an option (if necessary), select, and click <b>OK</b> .
<b>Appointment Date/ Time</b>	Type in the start and end times as well as the date of service (Service Date also has a dropdown tool to access a calendar).
<b>Procedure</b>	Use the magnifying glass tool to select a non-billable procedure, select, and click <b>OK</b> .
<b>Appt. Status</b>	The database will default the status. Use the magnifying glass tool to select another option as necessary, select, and click <b>OK</b> .
<b>Place of Service</b>	The database will default the place of service. Use the magnifying glass tool to select another option as necessary, select, and click <b>OK</b> .
<b>Fund</b>	This is not required for non-billable services.

The middle section will have dropdown choices concerning who was present at the visit.



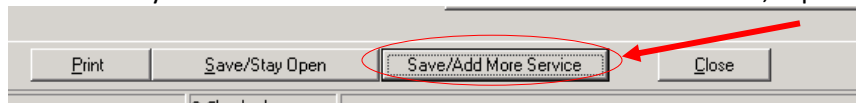
**Present At Session** Use the dropdown arrow tool to check an option or checkmark more than one option of who was present at the session.

The right section will have a notes section.

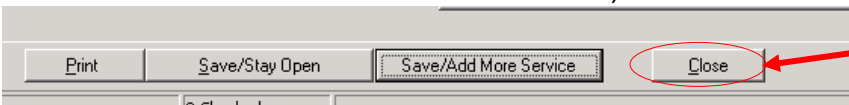


**Notes.** Clicking on the magnifying glass tool offers the choice between a free-form note field which can be used to copy and paste text from other documents. You also have the choice of using a **DAP** or **DAP2** field for Data/Assessment/Plan style notes.

- When the **Staff Services/Activities** window is complete, click on the **Save/Add More Service** button and the entry form will clear. If there are more services to enter, repeat step 7.



If there are no more services to enter for this client, click on the **Close** button to exit the form.



If you need further assistance please contact the ECSC Database Services Team:

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Local: (505) 277-0469

Toll Free: (855) 663-2821