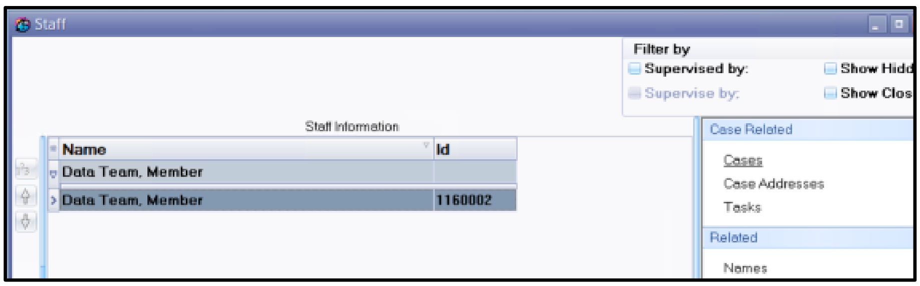
Quick Steps

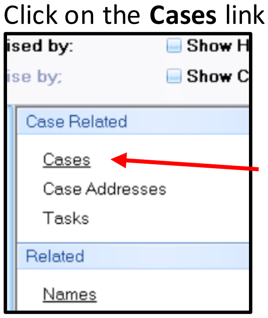
- Open the Case List Screen (if you are not already in it)
- Click the Case you are Working on
- From the Right Hand Menu Bar, Click on the Client Services Link
- Click the Add Button
- Fill out the Staff Services/Activities Form (all 3 sections)
- Click Save/Add More Service Button
- If Another Service 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:

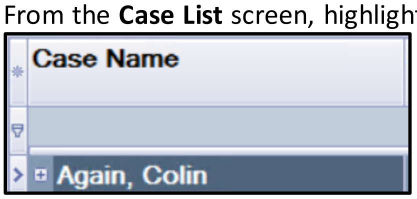
1. After logging into the database, the Staff window appears and the system identifies your name on the staff list.



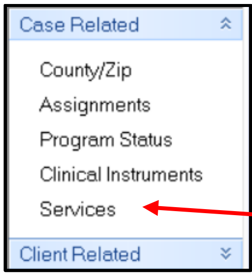
2. Click on the **Cases** link (on the side menu bar) to get to your open case list.



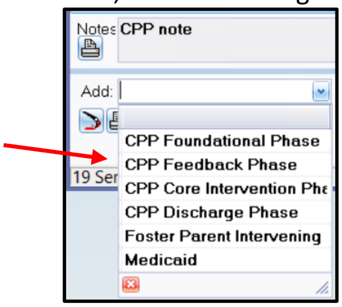
3. From the **Case List** screen, highlight the case that you want to work on.



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

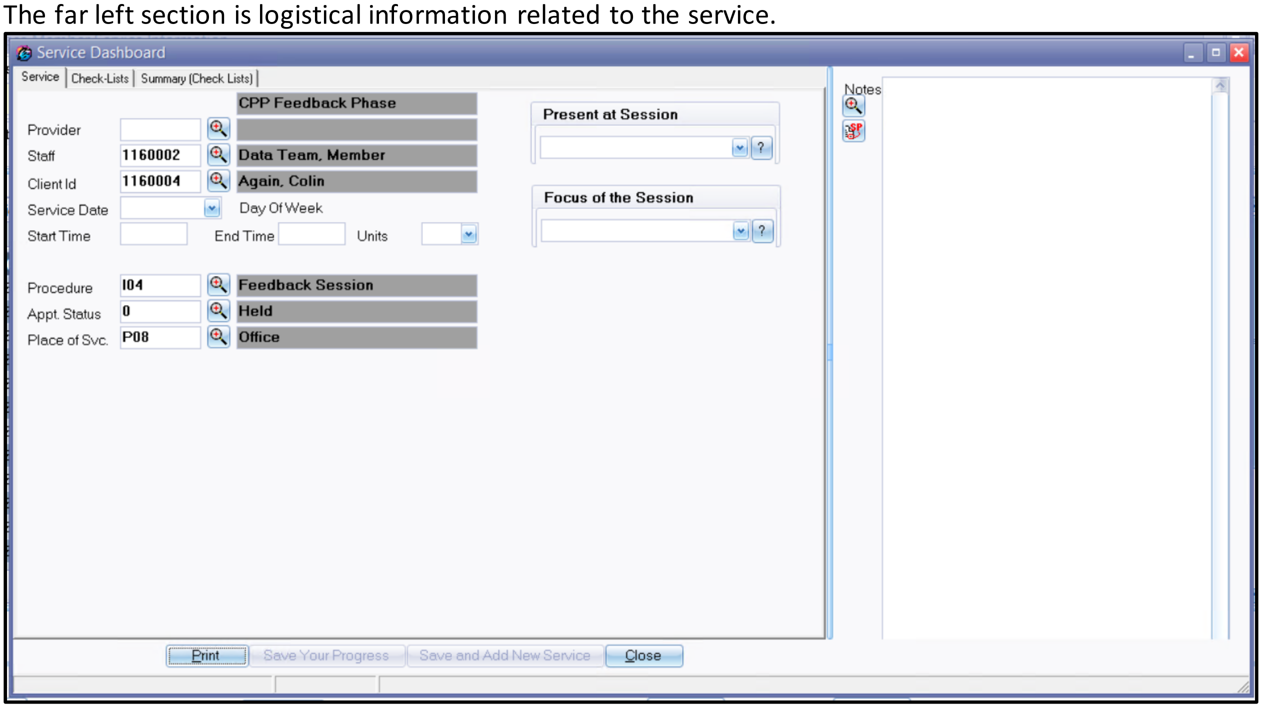


5. Use the down arrow to select the **CPP Phase, Foster Parent Intervening or Medicaid** from the Add field, then click the green arrow.



6. The **Staff Services/Activities** window will open.
Note, there is no auto-save function. Save your information by clicking **Save Your Progress** often in case of a power outage or disconnection.

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



Provider Use the magnifying glass look up tool to select the provider, select, and click **OK.**

Staff This field will automatically populate. Use the magnifying glass tool to select an option (if necessary), select, and click **OK**.

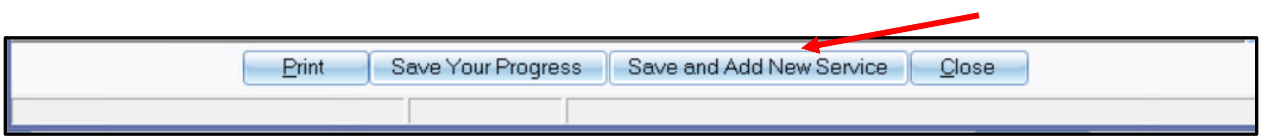
Client ID	Will automatically fill in for the client you have selected
Appointment Date/ Time	Type in the start and end times as well as the date of service (Service Date also has a dropdown tool to access a calendar).
Procedure	Use the magnifying glass tool to select a billable procedure, select, and click **OK.**
Appt. Status	The database will default the status. Use the magnifying glass tool to select another option as necessary, select, and click **OK.**
Place of Service	The database will default the place of service. Use the magnifying glass tool to select another option as necessary, select, and click **OK.**

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

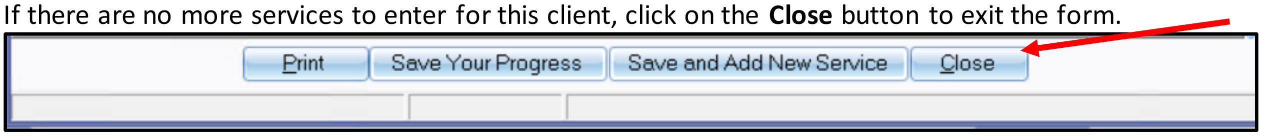
Present At Session	Use the dropdown arrow tool to check an option or checkmark more than one option of who was present at the session.
Focus of the Session	Use the dropdown arrow tool to check an option or checkmark more than one option related to the phase.

The right section will have a notes section, which is an optional field.

7. When the **Staff Services/Activities** window is complete, click on the **Save and Add New 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 ECSC Data & Web Services:

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