

USER GUIDE



clientpath

Allegheny County Department of Human Services

Services

ACDHS Users · Provider Users

Version 1.0

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Prepared By:

coresphere

1 Revision History

Version	Prepared By	Date Created	Description
1.0	CoreSphere	January 24, 2022	Initial Version

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3 Service Process

ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
✓	✓	✓	✓	--	✓	✓	✓	--

Services can be assigned to Clients in one of two ways: (1) via a Referral, or (2) via a Client record (without a Referral). Services assigned via a Referral can only be done by those who have Full Access to the Referral record, and only when the Referral Status = Accepted.

1.1 Assign a Service – Launch Service Selection Wizard

1.1.1 Select Members

1. From either a Client record or Accepted Referral record, click the [Select Service button](#). The Service Selection Wizard (SSW) is displayed. The first screen is the Select Members screen. If the SSW was launched from a Referral, it will display all Clients from the Referral, with the primary Client pre-selected. If the SSW was launched from a Client record, it will display the pre-selected primary Client, as well as all Clients with an existing relationship.

Service Selection Wizard

Select Members :

Name	MCI ID	Relationship	DOB	Select	Get MCI ID
Cameron Edwards	1001049677	Self	5/15/2010	Selected	Get MCI ID
Carol Brady	1001049702	Wife	5/5/1977	Select	Get MCI ID
Sullivan Edwards	1001049676	Uncle	7/4/1978	Select	Get MCI ID

Back

Next

2. If a Client does NOT have an MCI ID, click the [Get MCI ID button](#) next to the appropriate Client. A Client cannot be selected for service without being MCI-cleared. *Continue to Step 3.*

Otherwise, if the Client DOES have an MCI ID, click the [Select button](#) next to the appropriate Client(s) to select them for service. The Client will become Selected. If a Client already has an MCI ID, the Get MCI ID button is disabled. *Skip to Step 5.*

- **MCI Clearance:** If the mandatory information to MCI-clear [First Name, Last Name, DOB, Legal Sex and SSN (optional)] has been entered in the Client record, an MCI Client Search pop-out will be displayed with a list of potential matches (with the highest percent match on top, if any).
 - Otherwise, if the mandatory information to MCI-clear is NOT entered, a message will appear stating that MCI clearance cannot be completed until [missing information] is entered. You must then navigate to the Client record, by clicking on the Client Name, to make the appropriate updates.
3. **If the proper MCI match exists, click the *radio box* next to the appropriate Client, and click the *Update MCI ID button*.** The Client record in ClientPath will be updated with the MCI ID. *Skip to Step 5.*

Otherwise, if the proper match does NOT exist, *continue to Step 4.*
 4. **If the proper MCI match does NOT exist, click the *Create New MCI ID button*.** The Client record in ClientPath will be updated with a new MCI ID.
 5. **Upon selecting the Client(s) for service, click the *Next button* to go to the next screen.**

Service Selection Wizard

Select Members :

Name	MCI ID	Relationship	DOB	Select	Get MCI ID
Cameron Edwards	1001049677	Self	5/15/2010	Selected	<button style="background-color: #95a5a6; border: none; padding: 2px 5px;">Get MCI ID</button>
Carol Brady	1001049702	Wife	5/5/1977	Selected	<button style="background-color: #95a5a6; border: none; padding: 2px 5px;">Get MCI ID</button>
Sullivan Edwards	1001049676	Uncle	7/4/1978	Selected	<button style="background-color: #95a5a6; border: none; padding: 2px 5px;">Get MCI ID</button>

Back
Next

1.1.2 Select Service

The Select Service screen displays a list of any SP Services you have access to (as a Service Contact), and only for those that have the Services Module enabled. Each SP Service in the list includes the Service Name and the Facility/Provider through which it is associated. If the SP Service is configured as Confidential, the SP Service will automatically be marked as confidential.

1. **Optionally *enter the SP Service Name* in the search box to filter down to your Service.**
2. **Click the *radio box* next to the Service you wish to assign.** This selection will apply to ALL off the selected Clients from the previous screen (Select Members screen).
3. **Click the *Next button* to navigate to the next screen.**

Service Selection Wizard

Select Services :

Service Name	Provider/Facility	Provider Type
<input checked="" type="radio"/> Stop Now and Plan (SNAP)	S.N.A.P. (STOP NOW AND PLAN)	Facility

1.1.3 Review Selection

The Review Selection screen of the Service Selection Wizard (SSW) includes 2-3 sections depending on the configuration of the associated SP Service. Regardless of configuration, summaries of the Selected Service and Selected Member(s) will be displayed. If the 'Service Delivery' Module was enabled for the selected SP Service, only then will the 'Service Delivery Configuration' section appear with the Frequency and Quantity pre-populated per the SP Service configuration.

Service Selection Wizard

Review Selection :

Selected Service

Service Name	Facility	Provider Type	Start Date
Stop Now and Plan (SNAP)	S.N.A.P. (STOP NOW AND PLAN)	Facility	Jan 24, 2022 <input type="button" value="Calendar"/>

Service Delivery Configurations

Frequency*	Quantity*	Planned End Date
Daily	5	Jan 28, 2022

Selected Members

Member Name	MCI ID	Relation
Cameron Edwards	1001049677	Self
Carol Brady	1001049702	Wife
Sullivan Edwards	1001049676	Uncle

1. Optionally, update the **Start Date** to a date in the past, if applicable.

2. Optionally, update the **Frequency** and/or **Quantity**. The Planned End Date will automatically adjust based on Start Date, Frequency, and Quantity.
3. Optionally, click the **Back button** to navigate back to previous screens.

1.1.4 Submit Assignment

1. Within the Review Selection screen, click the **Submit button** to create and save the assignment. Upon successful submission, a success message is displayed, an Assigned Service record will be created and you will automatically be navigated to the Assigned Service record.

HOLY FAMILY INSTITUTE INC.
Service Provider Portal

Record created.
Client Service record has been created.

Robert Wegner
Supervisor
Logout

Search...

IRT Referrals Client Services Clients Providers SP Services Staff Reports

Assigned Service
AS-00251

DETAILS RELATED INTAKE SERVICE DELIVERY HISTORY

Information

View Access
Full

SP Service Name
Stop Now and Plan (SNAP)

Provider
HOLY FAMILY INSTITUTE INC.

Primary Client
Cameron Edwards

Referral ID
R-00457

Assigned Worker
Robert Wegner

Start Date
1/24/2022

End Date

Confidential Referral
☐

Confidential Service
☐

Service Status
Active

Intake Information

Intake Status
Not Started

Record Interaction

Start Time
Date Time

End Time
Date Time

Type
--None--

Outcome
--None--

Subject

Information from the SSW is copied into the Assigned Service record. Additionally:

- The **Assigned Worker** field will populate with the name of the user who created the Assigned Service
- The **Provider** field will populate with the Provider the Owner is associated with
- An **Assigned Service ID** is assigned
- The **Service Status** defaults to **Active**.
- The **Created By** and **Last Modified By** fields are updated with the Name/Date/Time of who/when the record was created/updated.

1.2 Access an Assigned Service

ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
✓	✓	✓	✓	✓	✓	✓	✓	✓

All ClientPath users can view Assigned Services across all Clients, Services, and Providers. Assigned Services can be found through the Client Services tab, or by navigating to a Client record to view Services specific to that Client.

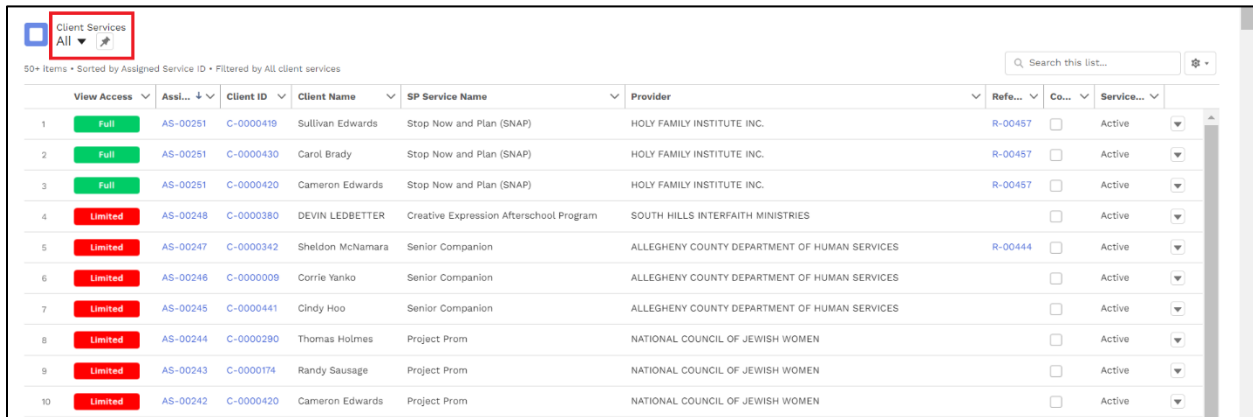
1.2.1 Confidential Services

Confidential Assigned Services are only viewable to the Assigned Worker/Owner, those above them in their Provider hierarchy, Admins and ACDHS Super Users. ACDHS/Provider Read-Only Users do not have access to any Confidential Assigned Services. If you do not have access to a Confidential Assigned Service, you will not see it in any list, report, or search result.

If Select Services was launched from a Referral and the SP Service selected in the SSW is not configured to be Confidential, but the Referral was marked confidential through the IRT, the Assigned Service record will automatically become confidential. Users with **Full Access** can optionally [de-select the Confidential checkbox](#) in the Referral to make both the Referral and Assigned Service non-confidential. Refer to Section 5 in the ClientPath Referrals User Guide to see how to edit a Referral.

1.2.2 Access Assigned Services Via Client Services Tab

1. Click the [Client Services tab](#) to see a list of Assigned Services that you have access to. By default, the 'Recently Viewed' list view may be displayed. This list only shows the Assigned Services you have recently viewed, not all Assigned Services.
2. Optionally, click the [drop-down arrow](#) at the top left and select the [All](#) list view.



	View Access	Assi...	Client ID	Client Name	SP Service Name	Provider	Refe...	Co...	Service...
1	Full	AS-00251	C-0000419	Sullivan Edwards	Stop Now and Plan (SNAP)	HOLY FAMILY INSTITUTE INC.	R-00457	<input type="checkbox"/>	Active
2	Full	AS-00251	C-0000430	Carol Brady	Stop Now and Plan (SNAP)	HOLY FAMILY INSTITUTE INC.	R-00457	<input type="checkbox"/>	Active
3	Full	AS-00251	C-0000420	Cameron Edwards	Stop Now and Plan (SNAP)	HOLY FAMILY INSTITUTE INC.	R-00457	<input type="checkbox"/>	Active
4	Limited	AS-00248	C-0000380	DEVIN LEDBETTER	Creative Expression Afterschool Program	SOUTH HILLS INTERFAITH MINISTRIES		<input type="checkbox"/>	Active
5	Limited	AS-00247	C-0000342	Sheldon McNamara	Senior Companion	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVICES	R-00444	<input type="checkbox"/>	Active
6	Limited	AS-00246	C-0000009	Corrie Yanko	Senior Companion	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVICES		<input type="checkbox"/>	Active
7	Limited	AS-00245	C-0000441	Cindy Hoo	Senior Companion	ALLEGHENY COUNTY DEPARTMENT OF HUMAN SERVICES		<input type="checkbox"/>	Active
8	Limited	AS-00244	C-0000290	Thomas Holmes	Project Prom	NATIONAL COUNCIL OF JEWISH WOMEN		<input type="checkbox"/>	Active
9	Limited	AS-00243	C-0000174	Randy Sausage	Project Prom	NATIONAL COUNCIL OF JEWISH WOMEN		<input type="checkbox"/>	Active
10	Limited	AS-00242	C-0000420	Cameron Edwards	Project Prom	NATIONAL COUNCIL OF JEWISH WOMEN		<input type="checkbox"/>	Active

For each Assigned Service in the All list view, links to the Assigned Service and Client records are displayed, as well as the Client Name, SP Service Name, Provider, link to associated Referral (if any), an indicator (selected) if the Assigned Service is confidential, and the Service Status. Once you see Assigned Service records listed, you can sort by clicking on the headers or filter the list further by using the search box.

Full Access vs. Limited Access: A green Full View Access or red Limited View Access icon is next to each Assigned Service to help you better understand which Assigned Services you see all or partial information for. If the Assigned Service is associated to your Provider, you have **Full Access** and can view all tabs within the Assigned Service record. This includes the ability to upload/view documents and record Interactions, External Referrals, Concrete Goods, Intake details, Service Delivery Details, and Discharge details, as applicable. If the Assigned Service is NOT associated to your Provider, you have **Limited Access** and can only view the Assigned Service Details tab and related Clients, but do NOT have access to upload/view documents or record Interactions, External Referrals, Concrete Goods, Intake details, Service Delivery Details, or Discharge details.

3. Optionally, click the [pushpin icon](#) next to the list view you want to make your default.
4. Click the [Assigned Service ID](#) to view a specific Assigned Service record. The Assigned Service record will be displayed.

1.2.3 Access Assigned Services Via Clients Tab

1. Click the [Clients](#) tab. A list of all Clients in ClientPath will be displayed.
2. Click the [Client ID](#) for the Client record you wish to view. The Client record will open with the Details tab displayed.
3. Click the [Services](#) tab within the Client record. A list of all services assigned to that specific Client are displayed, along with the Service Status, SP Service Name, Provider, Start and End Date.
4. Optionally click [column headers](#) to sort rows (ascending/descending).
5. Click the [Assigned Service ID](#) to view a specific Assigned Service record. The Assigned Service record will be displayed. See 4.2 above regarding Full Access and Limited Access.

Client
Sullivan Edwards

Date of Birth: 7/4/1978 Approximate Age: 43 Legal Sex: Male Client ID: C-0000419

DETAILS REFERRALS **SERVICES** CLIENT HISTORY

Client Services (5)
5 Items • Sorted by Start Date • Updated a few seconds ago

	Assigned S...	Service Sta...	SP Service Name	Provider	Start Date	End Date
1	AS-00251	Active	Stop Now and Plan (SNAP)	HOLY FAMILY INSTITUTE INC.	1/24/2022	
2	AS-00133	Discharged	Senior Companion	ALLEGHENY COUNTY DEPARTME...	11/30/2021	11/30/2021
3	AS-00134	Discharged	Families and Community Teamin...	TOUCHING FAMILIES, INC.	11/30/2021	11/30/2021
4	AS-00135	Discharged	Stop Now and Plan (SNAP)	HOLY FAMILY INSTITUTE INC.	11/30/2021	11/30/2021
5	AS-00242	Active	Project Prom	NATIONAL COUNCIL OF JEWISH ...	9/15/2021	

[View All](#)


1.3 View an Assigned Service Record

1.3.1 Details Tab

Upon navigating to an Assigned Service record (see 4.2 and/or 4.3 above), the [Details tab](#) will be displayed. The Details tab consists of:

- Information pertaining to the Assigned Service including SP Service Name, Provider, and Primary Client.
- Intake Information (initially blank but with an Intake Status = Not Started).

- Service Delivery Information (with the Frequency, Quantity, Planned Start and End Dates pre-populated as per the SSW) only if Service Delivery was configured for the SP Service

 Assigned Service
AS-00251

DETAILS RELATED INTAKE SERVICE DELIVERY HISTORY

Information

View Access	Start Date
Full	1/24/2022
SP Service Name	End Date
Stop Now and Plan (SNAP)	
Provider	Confidential Referral
HOLY FAMILY INSTITUTE INC.	<input type="checkbox"/>
Primary Client	Confidential Service
Cameron Edwards	<input type="checkbox"/>
Referral ID	Service Status
R-00457	Active
Assigned Worker	
Robert Wegner	

Intake Information


Intake Status	
Not Started	
Intake Last Modified By	Intake Last Modified Date/Time

Service Delivery Information


Frequency	Quantity
Daily	5
Planned Start Date	Actual Start Date/Time
1/24/2022	
Planned End Date	Actual End Date/Time
1/28/2022	

1.3.2 Related Tab

1. Click the **Related tab** within the Assigned Service record. The Related tab of an Assigned Service record displays data related to the Assigned Service, referred to as Related Lists. This includes (1) a list of all Clients included on the Assigned Service, and any associated (2) Interactions, (3) External Referrals, and (4) Concrete Goods. Each related list includes the number of records in parentheses, otherwise it will display 0. If a plus (+) sign is included in the count, that indicates there are more records than visible in the related list.
2. Optionally, click **column headers** to sort data (ascending/descending).
3. Optionally, click **View All** under the respective related list to view all records.
4. Optionally, click the **record ID** (link) for the record you wish to open/view.


 Assigned Service
AS-00256


DETAILS
 RELATED
 INTAKE
 SERVICE DELIVERY
 HISTORY


 Clients (2)
 1
 2 Items • Updated a few seconds ago

	Client ID	Client Name	Client Service St...	Discharge Date	Discharge Type	Discharge Reason	
1	C-0000436	Cynthia Brady	Active				▼
2	C-0000430	Carol Brady	Active				▼

View All

 Interactions (0)
 2

 External Referrals (0)
 3

 Concrete Goods (0)
 4

1.3.3 Intake Tab

Intake related information can be found within the Intake Tab of an Assigned Service record. This is only applicable for services that have Intake enabled. See additional guide for information on the Intake process.

1.3.4 Service Delivery Tab

Service Delivery related information can be found within the Service Delivery Tab of an Assigned Service record. This is only applicable for services that have Service Delivery enabled and intend to capture information to each specific service episode. See additional guide for information on the Service Delivery process.

1.3.5 History Tab

1. Click the **History tab** within the Assigned Service record. The History tab of an Assigned Service record displays a related list of changes to data within the Assigned Service record. This includes the:
 - Date the change was made
 - Field that was changed
 - User who made the change
 - Original Value that previously existed
 - New Value that was entered

- Optionally, click [View All](#) to view all records.

Assigned Service
AS-00251

DETAILS RELATED INTAKE SERVICE DELIVERY **HISTORY**

Assigned Service History (1)
1 item • Sorted by Date • Updated a few seconds ago

	Date	Field	User	Original Value	New Value
1	1/24/2022, 1:11 AM	Created.	Robert Wegner		

[View All](#)

1.4 Edit an Assigned Service

ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
✓	✓	✓	✓	--	✓	✓	✓	--

If you have **Full Access** to an Assigned Service record and the Service Status = Active, you can edit the Assigned Service. See steps below. If you have **Limited Access** to the Assigned Service, you do NOT have access to edit the Assigned Service.

- From within an Assigned Service record, click the [drop-down arrow](#) at the top right next to the group of buttons and click [Edit](#). The Assigned Service will open in a pop-up screen in editable mode.

Assigned Service
AS-00251

Upload/View Documents Assign Worker Start Intake **▼**

DETAILS RELATED INTAKE SERVICE DELIVERY HISTORY

Information

View Access: **Full**

SP Service Name: [Stop Now and Plan \(SNAP\)](#)

Provider: HOLY FAMILY INSTITUTE INC.

Primary Client: Cameron Edwards

Referral ID: R-00457

Start Date: 1/24/2022

End Date:

Confidential Referral: ☐

Confidential Service: ☐

Record Interaction

Start Time:

End Time:

Type:

- Update data as required and click the [Save button](#) to save your changes. Only the End Date can be changed. Changes are captured in the Assigned Service's History Tab.

1.5 Assign Worker to an Assigned Service

ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only

✓	✓	✓	✓	--	✓	✓	✓	--
---	---	---	---	----	---	---	---	----

If you have **Full Access** to an Assigned Service record and the Service Status = Active, you can assign a Worker to the Assigned Service. See steps below. If you have **Limited Access** to the Assigned Service, you do NOT have access to assign a Worker.

The default Assigned Worker (Owner) is the user who created the Assigned Service through the SSW. To change the assigned Worker:

1. Within an Assigned Service record, click the **Assign Worker** button. A search pop-up will be displayed.

2. In the search box, **type the name** of the staff member you want to search for. Only Active Staff members associated to the same Provider (as the Assigned Service) will be displayed.

3. Select the **staff member** you want to assign.
4. Click the **Save** button to save the worker assignment. Upon save, the Assigned Worker field is updated with the newly selected staff member's name. Additionally, the History tab of the Assigned Service record captures the change(s) to the Assigned Worker field.

1.6 Upload/View Documents

ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
✓	✓	✓	✓	✓	✓	✓	✓	✓

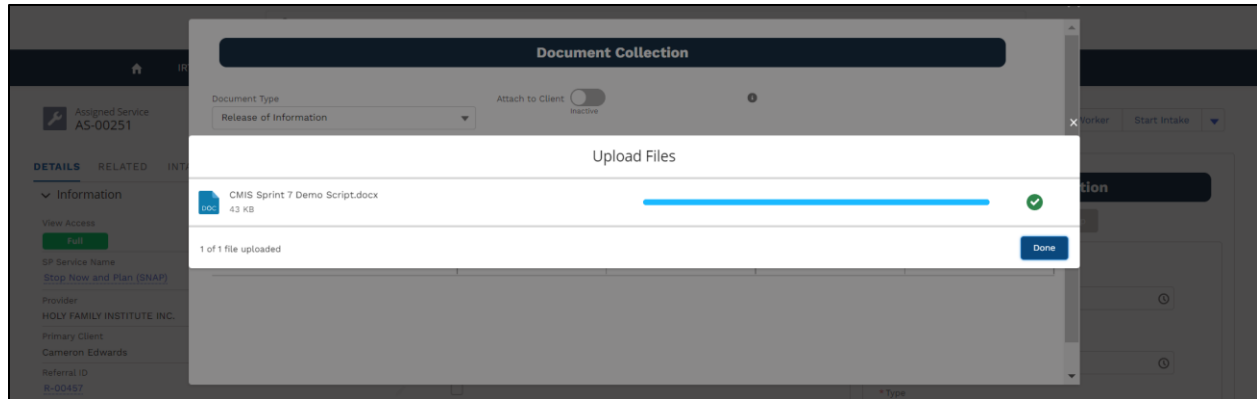
If you have **Full Access** to an Assigned Service record, you have access to Upload/View Documents related to the Assigned Service. Read-Only users do NOT have access to upload documents. If you have **Limited Access** to the Assigned Service, you do NOT have access to Upload/View Documents related to the Assigned Service.

1.6.1 Upload Documents

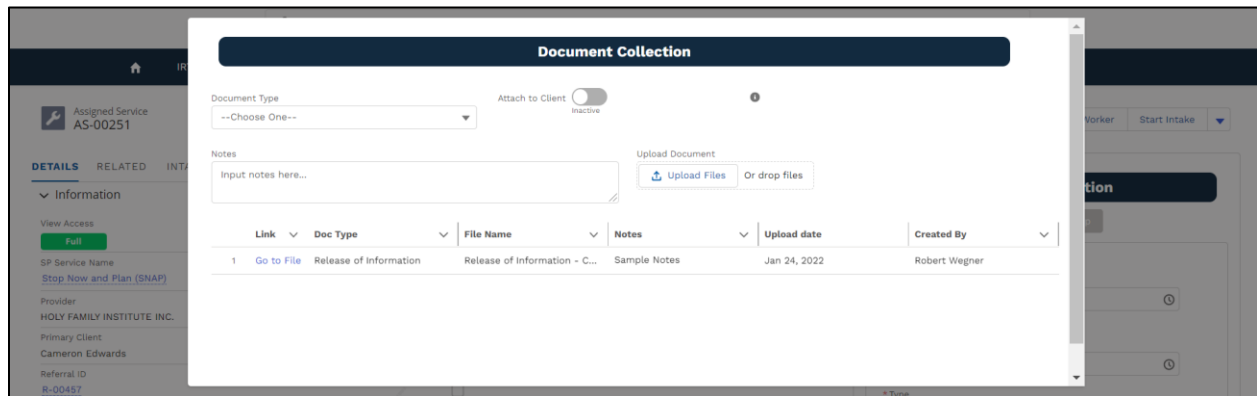
1. Within an Assigned Service record, click the [Upload/View Documents](#) button toward the top right of the screen. The Document Collection screen will be displayed.

The top screenshot displays the 'Assigned Service' record for AS-00251. The 'Upload/View Documents' button is highlighted in a red box. The bottom screenshot shows the 'Document Collection' modal window. It includes a 'Document Type' dropdown menu set to 'Release of Information', an 'Attach to Client' toggle switch, a 'Notes' text area, and an 'Upload Document' section with 'Upload Files' and 'Or drop files' options. A table with columns for Link, Doc Type, File Name, Notes, Upload date, and Created By is also visible.

2. Select a [Document Type](#) from the drop-down provided. Upon selection, the Document Type Description will appear for your reference.
3. Optionally, click the [Attach to Client](#) toggle. With this toggle enabled, the document will not only get attached to the Assigned Service record, but also attached to all Client records associated with the Assigned Service. If the Assigned Service is marked as Confidential, the Attach to Client toggle will not be available for selection.
4. Optionally, enter any [Notes](#) about the document.
5. Click the [Upload Files](#) button to search and [select a file](#) from your computer. Upon selection, the file will be uploaded.

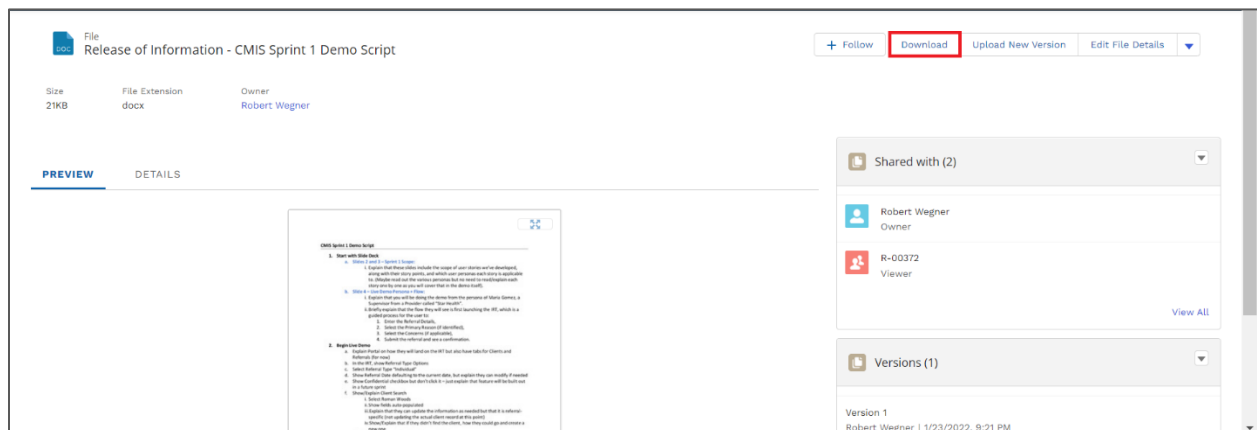


- Click the **Done** button once it is available. A row will be created for the attached file that includes a Link to the file, Doc Type, File Name, Notes (if any), Upload Date, and Created By.



1.6.2 View Documents

- Click the **Upload/View Documents** button to open the Document Collection screen.
- Click the **Go to File** link next to the document you wish to view. The Preview tab of the File record is displayed.



- Click the **Download** button to download the file.

- Optionally, click the [Details tab](#) to view details of the document.

1.7 Record Interactions

ACDHS Staff					Provider Staff			
Admin	Super User	Supervisor	Worker	Read-Only	Super User	Supervisor	Worker	Read-Only
✓	✓	✓	✓	--	✓	✓	✓	--

If you have **Full Access** to an Assigned Service record, you have access to view and record Interactions related to the Assigned Service. If you have **Limited Access** to the Assigned Service, you do NOT have access to view or record Interactions related to the Assigned Service.

A [Record Interaction](#) component resides on the right side of each Assigned Service record. Use this component to document any interactions you have with the Client(s) or other supports during the Services stage. All required fields are indicated with a red asterisk (*).

- Ensure all fields are entered/selected. Optionally click the [Start and Stop buttons](#) to automatically populate the Start/End Date and Time fields. Otherwise, [manually enter](#) those details.
- Click the [Save button](#) at the bottom of the component to save the interaction or click the [Clear button](#) to clear the form and start over. Upon save of an Interaction, an Interaction record is created, and you will be automatically navigated to that record. The duration of the interaction is automatically calculated based on Start Date/Time and End Date/Time. All Interactions associated to a given Assigned Service can be found within the Related tab of the Assigned Service record and within the Interactions related list.

The screenshot displays the 'Assigned Service' record for AS-00251. The left sidebar shows tabs for DETAILS, RELATED, INTAKE, SERVICE DELIVERY, and HISTORY. The main content area is divided into two sections: 'Information' and 'Intake Information'. The 'Information' section includes fields for View Access (Full), SP Service Name (Stop Now and Plan (SNAP)), Provider (HOLY FAMILY INSTITUTE INC.), Primary Client (Cameron Edwards), Referral ID (R-00457), Assigned Worker (Robert Wegner), Start Date (1/24/2022), End Date, Confidential Referral, Confidential Service, and Service Status (Active). The 'Intake Information' section is currently collapsed. On the right side, the 'Record Interaction' component is visible, featuring a 'Start' button and a 'Stop' button. Below these buttons, there are input fields for Start Time (Date: Jan 21, 2022; Time: 9:30 AM) and End Time (Date: Jan 21, 2022; Time: 10:15 AM). The 'Type' field is set to 'Phone Call' and the 'Outcome' field is set to 'Completed'.

1.7.1 Record Concrete Goods

Within an Assigned Service Interaction record, users with Core Plus profiles can view record any concrete goods (tangible items) provided to the Client(s) during the Services stage.

1. **Within the Interaction record, click the *Add Concrete Goods* button.** A pop-up will be displayed with a list of all Clients associated to the Assigned Service, as well as a list of Concrete Goods provided (if any).

2. **Click the *Create* button next to the respective Client.** A Record Concrete Goods pop-up is displayed.
3. **Ensure a *Concrete Good Category* is selected.** This information is required to Save.
4. **Ensure a *Description of Item(s) Provided* is entered.** This information is required to Save.

5. Ensure the **Number of Item(s) Provided** is entered. This information is required to Save.
6. Optionally enter an associated **Monetary Amount**.

HOLY FAMILY INSTITUTE INC.
Service Provider Portal

Search...

IRT Referrals Client Services

Interaction E-000329

Information

Subject First Meeting

Type In Person

Start Time 1/23/2022, 10:00 AM

Record Concrete Goods

Client Name: Sullivan Edwards

* Concrete Good Category
Clothing

* Description of Item(s) Provided
Winter Jackets

* Number of Item(s) Provided
3

Monetary Amount
\$30.00

Save Clear

Robert Wegner
Supervisor
Logout

Edit Add External Referral Add Concrete Goods

Interaction History (1)

Field	User	Original Value	New Value
Created.	Robert Wegner		

View All

7. Click the **Save button** to save the data or click the **Clear button** to clear the form and start over. Upon Save, a Concrete Good record is created, and a row is displayed within the Concrete Goods list.

HOLY FAMILY INSTITUTE INC.
Service Provider Portal

Search...

IRT Referrals Client Services

Interaction E-000329

Information

Subject First Meeting

Type In Person

Start Time 1/23/2022, 10:00 AM

End Time

Success !!
Concrete Goods saved for Client Sullivan Edwards

Client List

Client Id	Client Name	DOB	Concrete Goods
C-0000419	Sullivan Edwards	7/3/1978	Create
C-0000420	Cameron Edwards	5/14/2010	Create
C-0000430	Carol Brady	5/4/1977	Create

Concrete Goods

ID	Client Name	Category	Quantity	Description
CG-0000084	Sullivan Edw...	Clothing	3	Winter Jackets

Close

Robert Wegner
Supervisor
Logout

Edit Add External Referral Add Concrete Goods

Interaction History (1)

Field	User	Original Value	New Value
Created.	Robert Wegner		

View All

Referrals (0)

8. Click the **Close button** to close the Concrete Goods screen. Any Concrete Goods record created will also appear in the Concrete Goods related list on the right side of the Interaction record.

HOLY FAMILY INSTITUTE INC.
Service Provider Portal

Search...

IRT Referrals Client Services

Interaction E-000330

Information

Subject First Call

Type Phone Call

Start Time 1/21/2022, 9:30 AM

End Time 1/21/2022, 10:15 AM

Outcome Completed

Interaction Notes

Notes Notes regarding first call

System Information

Assigned Service ID AS-00251

Interaction ID E-000330

Duration 0 Hours 45 Minutes

Owner Robert Wegner

Edit Add External Referral Add Concrete Goods

Interaction History (1)

Date	Field	User	Original Value	New Value
1/24/2022, ...	Created.	Robert Wegner		

View All

External Referrals (0)

Concrete Goods (1)

Concrete Goods...	Interaction Date	Client Name	Concrete Good C...
CG-0000085	1/21/2022	Sullivan Edwards	Clothing

View All

1.7.2 Record External Referrals

Within an Assigned Service Interaction record, users with Core Plus profiles can view record any External Referrals provided to the Client(s) during the Services stage. This functionality can be used if you are referring the Client(s) to a service for another provider.

1. **Within the Interaction record, click the [Add External Referral button](#).** A pop-up will be displayed with a list of all Clients associated to the Assigned Service, as well as a list of External Referrals provided (if any).

Client List

Client Id	Client Name	DOB	External Referral
C-0000419	Sullivan Edwards	7/3/1978	Create
C-0000420	Cameron Edwards	5/14/2010	Create
C-0000430	Carol Brady	5/4/1977	Create

External Referrals

ID	Client Name	Category	Referred To
Close			

2. **Click the [Create button](#) next to the respective Client.** A Record External Referral pop-up is displayed.
3. **Ensure a [Referral Category](#) is selected.** This information is required to Save.
4. **Ensure a [Referred To](#) is entered.** This information is required to Save.
5. **Optionally enter any associated [Notes](#).**

Record External Referral

Client Name: Sullivan Edwards

* Referral Category: Employment and Training

* Referred To: ABC Training

Notes: Sample notes for External Referral

[Save](#) [Clear](#)

6. **Click the [Save button](#) to save the data or click the [Clear button](#) to clear the form and start over.** Upon Save, an External Referral record is created, and a row is displayed within the External Referrals list.

HOLY FAMILY INSTITUTE INC.
Service Provider Portal

Search...

IRT Referrals Client Services

Interaction E-000329

Information

Subject: First Meeting

Type: In Person

Start Time:

Success !!
External Referral saved for Client Sullivan Edwards

Client List

Client Id	Client Name	DOB	External Referral
C-0000419	Sullivan Edwards	7/3/1978	Create
C-0000420	Cameron Edwards	5/14/2010	Create
C-0000430	Carol Brady	5/4/1977	Create

External Referrals

ID	Client Name	Category	Referred To
ER-0000101	Sullivan Edwards	Employment and ...	ABC Training

[Close](#)

Robert Wegner
Supervisor
[Logout](#)

Edit Add External Referral Add Concrete Goods

Interaction History (1)

Field	User	Original Value	New Value
Created.	Robert Wegner		

[View All](#)

- Click the [Close button](#) to close the External Referrals screen. Any External Referrals record created will also appear in the External Referrals related list on the right side of the Interaction record.

Interaction E-000330

Edit Add External Referral Add Concrete Goods

Information

Subject: First Call

Type: Phone Call

Start Time: 1/21/2022, 9:30 AM

End Time: 1/21/2022, 10:15 AM

Outcome: Completed

Interaction Notes

Notes: Notes regarding first call

System Information

Assigned Service ID: AS-00251

Interaction ID: E-000330

Duration: 0 Hours 45 Minutes

Owner: Robert Wegner

Interaction History (1)

Date	Field	User	Original Value	New Value
1/24/2022, ...	Created.	Robert Wegner		

[View All](#)

External Referrals (1)

External Referr...	Interaction Date	Client Name	Referral Category
ER-0000102	1/21/2022	Sullivan Edwards	Employment and ...

[View All](#)

Concrete Goods (1)

Concrete Goods...	Interaction Date	Client Name	Concrete Good C...
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