

Adding a Service to a Provider's Existing Client

1. Go to your Client list.

Code	Provider	Status	Address	City			
G055	SENIOR RESOURCES OF GUILFORD	A	301 E. WASHINGTON STREET	GREENSBORO	Details..	Clients...	Services...

2. Find your client that needs a new service, click details

Home Region Allocation Region Budget Provider Budgets Providers Clients Export Repo

[Add Client](#) [Providers](#)

Client List

Provider Code : G030
 Agency Name : REGIONAL CONSOLIDATED SERVICES

Index on Last Name: [\[All\]](#) - [A](#) - [B](#) - [C](#) - [D](#) - [E](#) - [F](#) - [G](#) - [H](#) - [I](#) - [J](#) - [K](#) - [L](#) - [M](#) - [N](#) - [O](#) - [P](#) - [Q](#) - [R](#) - [S](#) - [T](#) - [U](#) - [V](#) - [W](#) - [X](#) - [Y](#) - [Z](#)

SSN4	Last Name	First Name	Sex	Date Of Birth	Provider Client Status	Registration Date	
3	BAILEY	JOANN	F	8 3	Active	10/21/2015	Details...
5	BALDWIN	DOROTHY	F	1 31	Active	9/9/2013	Details...
1	BALDWIN	LINDA	F	4 0	Active	7/1/2005	Details...
3	BARBEE	DOROTHY	F	6	Active	3/11/2008	Details...
5	BARBOUR	JESSIE	M	3 0	Active	5/12/2011	Details...
7	BARRATT	ROBERT	M	1 3	Active	7/7/2011	Details...
3	BARRETT	INELL	F	5 4	Active	2/13/2013	Details...
5	BEAL	JUDY	F	8 5	Active	8/4/2010	Details...

- Look halfway down the screen, click Add/Update Services

Provider Client Details

Provider Code : [G030](#)
 Agency Name : [REGIONAL CONSOLIDATED SERVICES](#)
 Last 4 Digits SSN : [XXXX](#)
 Name : [BALDWIN DOROTHY](#)
 Provider Client Established Date : 09 / 09 / 2013
 Provider Client Status : Active ▾
 Provider Client Assessment Date : 7/10/2015
 Provider Client Functional Status : At Risk .
 Provider Client Nutrition Health Score : N/A
 Client Status : A
 Date Of Birth : [XXXXXXXXXX](#)
 Registration Date : 9/9/2013
 Address : 414 WATKINS ST
 City : [AUGUSTA](#)
 State : [GA](#)
 Zip : 30602
 County : Randolph
 Phone : (303) XXX-XXXX
 Sex : Female
 Marital Status : Single (never married)

Emergency Contact Person

Name: [AXXXXXXXXXX](#)
 Day Time Phone: (303) 620-4504
 Evening Phone: () -

Provider Client Services

Date	Service Code	Service Name	Service Status	Allow Care Recipients
11/1/2013	041	IN-HOME LEVEL 1 - HOME MANAGEMENT	I	No
10/16/2013	140	HOUSING AND HOME IMPROVEMENT	I	No
8/29/2013	042	IN-HOME LEVEL 2 - PERSONAL CARE	I	No

Provider Client Assessments

- Click the new service you want to add. I used 853, but it could be another service

Provider Client Assessment

Provider Code : G030 Agency Name : REGIONAL CONSOLIDATED SE
 Last 4Digits of SSN : 0000 Date Of Birth : 12/20/1954
 First Name : DORIS Last Name : BALDWIN

	Service Code	Name	Service Status
<input checked="" type="checkbox"/>	041	IN-HOME LEVEL 1 - HOME MANAGEMENT	Inactive ▾
<input checked="" type="checkbox"/>	042	IN-HOME LEVEL 2 - PERSONAL CARE	Inactive ▾
<input type="checkbox"/>	044	IN-HOME LEVEL 3 - HOME MANAGEMENT	Active ▾
<input type="checkbox"/>	045	IN-HOME LEVEL 3 - PERSONAL CARE	Active ▾
<input checked="" type="checkbox"/>	140	HOUSING AND HOME IMPROVEMENT	Inactive ▾
<input type="checkbox"/>	235	IN-HOME LEVEL 1 - RESPITE	Active ▾
<input type="checkbox"/>	236	IN-HOME LEVEL 2 - RESPITE	Active ▾
<input type="checkbox"/>	237	IN-HOME LEVEL 3 - RESPITE	Active ▾
<input type="checkbox"/>	842	FC-IN-HOME RESPITE	Active ▾
<input type="checkbox"/>	853	FC-HANDYMAN-YARD WORK	Active ▾
<input type="checkbox"/>	854	FC-MEDICAL EQUIP & ASST TECHNOLOGY	Active ▾

- You will then fill out the assessment for the client; and attach the care recipient if it is a family caregiver client.
- After the assessment is done, you have to add the client to the SRW. Click Home, and then click Services

Code	Provider	Status	Address	City			
G055	SENIOR RESOURCES OF GUILFORD	A	301 E. WASHINGTON STREET	GREENSBORO	Details...	Clients..	Services...

7. Then you Click SRW

Randolph	RANDOLPH HOSPITAL - HOME HEALTH(G008)	FC-SUPPORT GROUPS(833)	Detail	SRWs	Reimbursements	Contributions
Randolph	REGIONAL CONSOLIDATED SERVICES(G030)	FC-HANDYMAN-YARD WORK(853)	Detail	SRWs	Reimbursements	Contributions
Randolph	REGIONAL CONSOLIDATED SERVICES(G030)	FC-INFORMATION AND ASSISTANCE(822)	Detail	SRWs	Reimbursements	Contributions
Randolph	REGIONAL CONSOLIDATED SERVICES(G030)	FC-IN-HOME RESPITE(842)	Detail	SRWs		Contributions
Randolph	REGIONAL CONSOLIDATED SERVICES(G030)	FC-MEDICAL EQUIP & ASST TECHNOLOGY(854)	Detail	SRWs	Reimbursements	Contributions
Randolph	REGIONAL CONSOLIDATED SERVICES(G030)	HOUSING AND HOME IMPROVEMENT(140)	Detail	SRWs	Reimbursements	Contributions
Randolph	REGIONAL CONSOLIDATED SERVICES(G030)	IN-HOME LEVEL 1 - HOME MANAGEMENT(041)	Detail	SRWs		Contributions
Randolph	REGIONAL CONSOLIDATED SERVICES(G030)	IN-HOME LEVEL 1 - RESPITE(235)	Detail	SRWs		Contributions

8. Click details

The screenshot shows the 'Aging Resource Management System' interface. At the top, the user name 'Susan.Ferriola' is displayed. Below the header, there are navigation tabs: 'Home', 'Region Allocation', 'Region Budget', 'Provider Budgets', and 'Provider'. A details window is open, showing the following information:

- Provider: REGIONAL CONSOLIDATED SERVICES(G030)
- Region: PIEDMONT TRIAD REGIONAL COUNCIL
- County: Randolph
- Service: FC-HANDYMAN-YARD WORK

Below this information is a table with the following columns: SRWCode, Description, and two unlabeled columns. The first row of data is:

SRWCode	Description		
853	HANDY MAN YARD WORK	Details	Service Totals

At the bottom of the details window, there are three buttons: 'Add Provider Site/Route/Worker', 'Provider Budgets', and 'Cancel'. The 'Details' link in the table is highlighted with a red circle.

9. Find the Client in the dropdown box

Provider Site/Route/Worker Information

Provider Code : G030
 Agency Name : REGIONAL CONSOLIDATED SERVICES
 Region : G
 County : Randolph
 Service : FC-HANDYMAN-YARD WORK(853)
 Site/Route/Worker Code : 853
 Description :
 CreateUser: TERI.MABRY
 CreateTime: 4/7/2016 2:45:22 PM
 ModifyUser: TERI.MABRY
 ModifyTime: 4/8/2016 9:55:22 AM
 Clients :

SSN4	Name	Sex	Date Of Birth	Client Status		
6000	BROWN M... ..	F	5/20/1910	A	[Remove]	Details
4707	SYKES C... ..	F	6/17/1926	A	[Remove]	Details

BOWERS-4198-M-07191930 ▾
BOWERS-4198-M-07191930

Provider Site/Route/Worker Information

Provider Code : G030
 Agency Name : REGIONAL CONSOLIDATED SERVICES
 Region : G
 County : Randolph
 Service : FC-HANDYMAN-YARD WORK(853)
 Site/Route/Worker Code : 853
 Description :
 CreateUser: TERI.MABRY
 CreateTime: 4/7/2016 2:45:22 PM
 ModifyUser: TERI.MABRY
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 Clients :

SSN4	Name	Sex	Date Of Birth	Client Status		
6000	BROWN M... ..	F	5/20/1910	A	[Remove]	Details
2000	SYKES C... ..	F	6/17/1926	A	[Remove]	Details

BOWERS-4198-M-07191930 ▾
[Add]

10. Click on the work ADD

11. The Click update. At the SRW Screen then Click Service totals

Home Region Allocation Region Budget Provider Budgets Provid

Provider: REGIONAL CONSOLIDATED SERVICES(G030)
Region: PIEDMONT TRIAD REGIONAL COUNCIL
County: Randolph
Service: FC-HANDYMAN-YARD WORK

SRWCode	Description		
853	HANDY MAN YARD WORK	Details	Service Totals

12. Now you can add Units.