

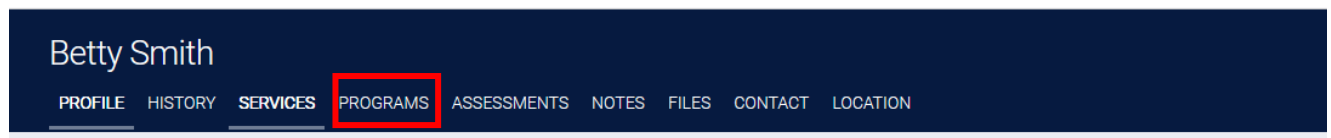


Step-by-Step: Program Services

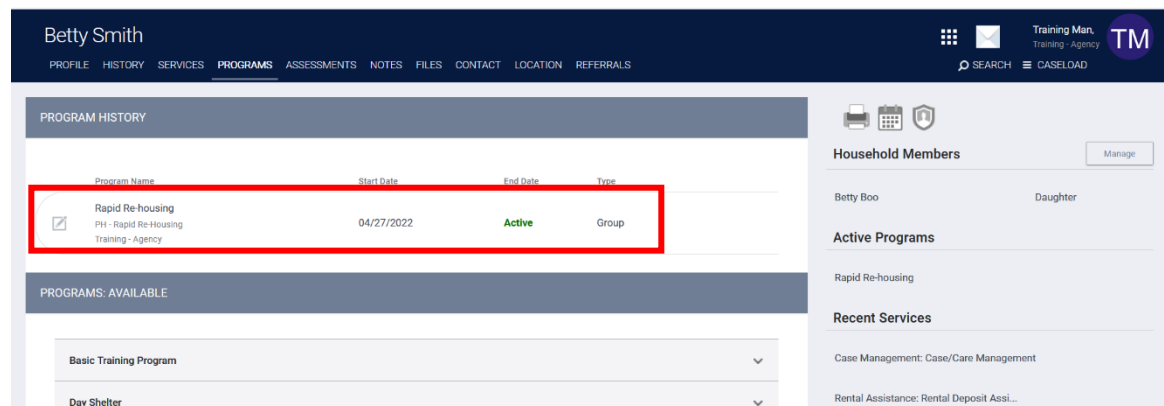
1. Login to CSIS.
2. Search for Client
3. To select client, hover your mouse over name and click on the box with the pencil to the left of the client's name.

The client demographic profile will appear. Review all information to ensure this correct. If client is missing a release of information, a warning will display across the top of the client's record. This will need to be completed before continuing.

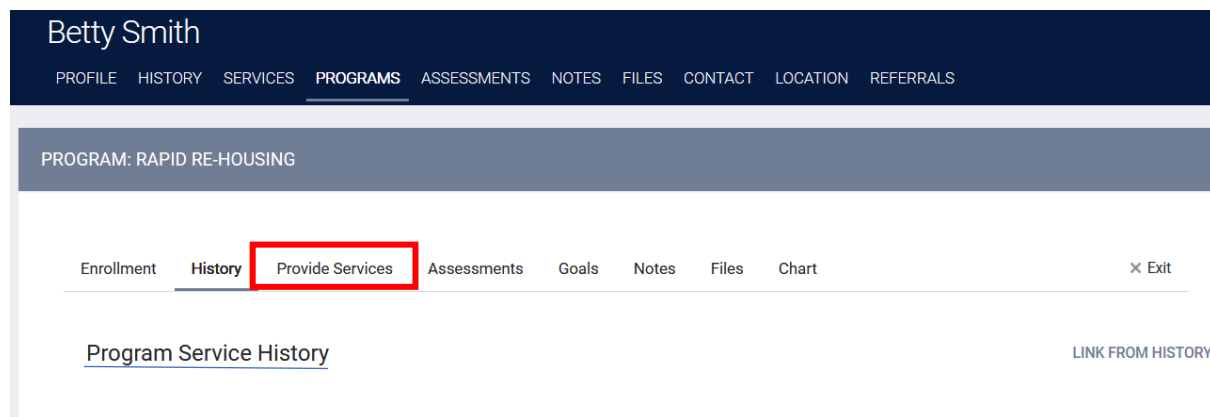
4. Click on the “**PROGRAM**” text along with of the screen



5. Client's Program History screen will appear. Select the client's active program you are wanting to add a service to, by clicking on the pencil to the left of the pencil.



6. The program history for this client will now display. To add a service select **Provide Service**





Adding Non-financial Services

1. Select which service category you wish to provide client with by clicking the down arrow. This will open all available services under this category.
2. For case management services, you can time track if this is necessary for your program.

*Please do not add case notes under the service notes section.

A screenshot of a web form titled "Services". At the top, there is a header bar with "Case Management" on the left and a dropdown arrow on the right. Below this is a dropdown menu currently showing "Case/Care Management", which is highlighted with a red rectangular box. Underneath the dropdown, the form contains fields for "Event Date" (set to 04/21/2022), "Time Tracking" (set to None), and a "Service Note" text area with formatting icons (B, I, U, and a bulleted list icon). A "SUBMIT" button is located at the bottom right of the form, also highlighted with a red rectangular box.



Adding Financial Services

1. To select the type of service you wish to provide by click on the down arrow to the left. Complete all service information (**start date, end date, expense amount, expense date, funding source, vendor**), include all household members (if not a VA program) on screen and **SUBMIT**.

Betty Smith

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: RAPID RE-HOUSING

Enrollment History Provide Services Assessments Goals Notes Files Chart × Exit

Services

Case Management

Case Management ▼

Housing

Housing ▼

Rental Assistance

Rental Assistance ▼

Rental Payment Assistance

Start Date:

05/10/2022

End Date:

05/10/2022

Expense Amount:

1000

Expense Date:

05/10/2022

Funding Source:

DCF-ESG-RRH ▼

Vendor:

Landlord

Include group members:

☐ Betty Boo

Service Note :

B I [icon] [icon]

Rent payment for May 2022.

SUBMIT

2. To add additional services, follow steps 7 through 8 to all have been completed.