



Step-by-Step: Program Services

Adding Non-Financial Services

1. Login to CSIS.
2. Search for Client
3. Verify the client has an active Universal ROI (UROI) is not active, the system will notify you with the image below.

 Release of Information is Missing or Permission Not Provided. Please review to ensure compliance. [MANAGE](#)

- a. You can also manager the UROI in the client's privacy.



ADD RELEASE OF INFORMATION (+)

- b.

4. Review and add the client's **Contact Information**.

CONTACT

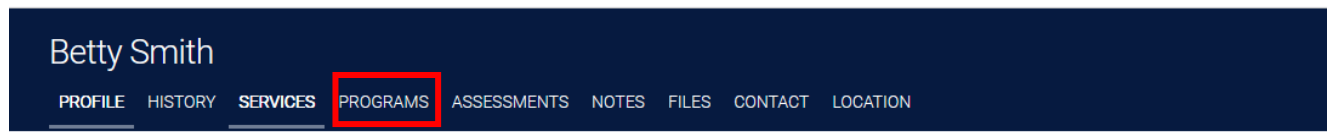
ADD CONTACT (+)

5. Review and add the client's **Location Information**.

LOCATION

ADD ADDRESS (+)

6. Click on the **"PROGRAM"** text along with of the screen



7. 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.

Program Name	Start Date	End Date	Type
<input checked="" type="checkbox"/> Rapid Re-housing PH - Rapid Re-Housing Training - Agency	04/27/2022	Active	Group

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

Betty Smith

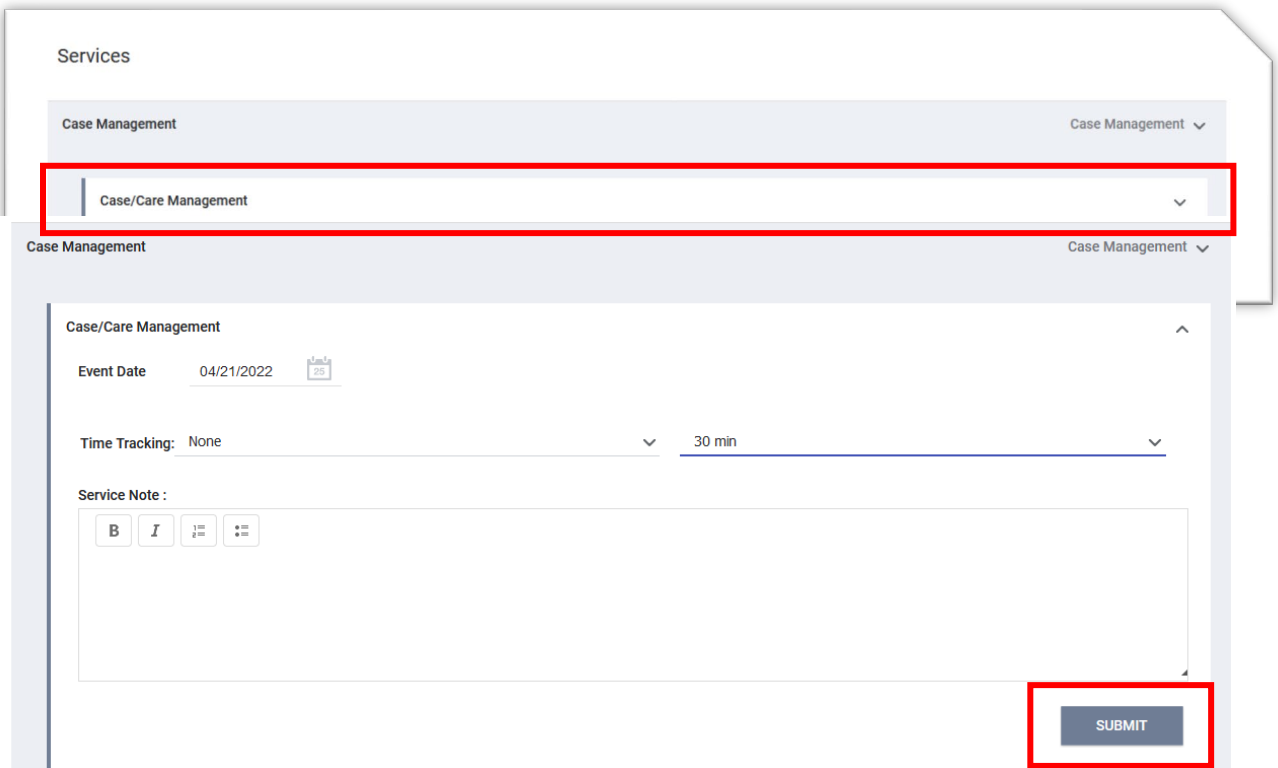
PROFILE HISTORY SERVICES **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

PROGRAM: RAPID RE-HOUSING

Enrollment History **Provide Services** Assessments Goals Notes Files Chart × Exit[Program Service History](#)[LINK FROM HISTORY](#)

9. Select which service category you wish to provide client with by clicking the down arrow. This will open all available services under this category.
10. 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.




Services

Case Management Case Management ▾

Case/Care Management ▾



Case Management Case Management ▾

Case/Care Management ^

Event Date 04/21/2022 

Time Tracking: None ▾ 30 min ▾

Service Note :

B *I*  

SUBMIT



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*  

Rent payment for May 2022.

SUBMIT

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