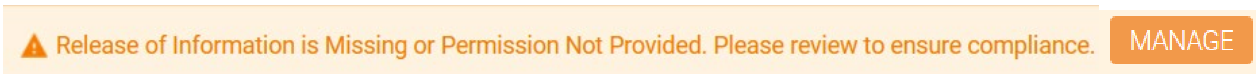
Suncoast Partnership

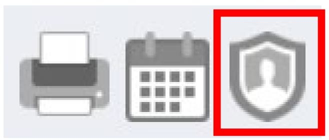
Step-by-Step: Program Services

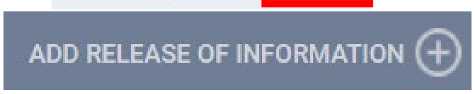
Adding Non-Financial Services

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.

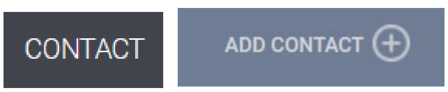


   a. You can also manager the UROI in the client's privacy.

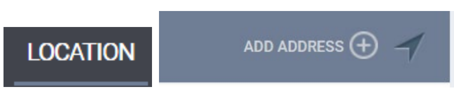


   b. 

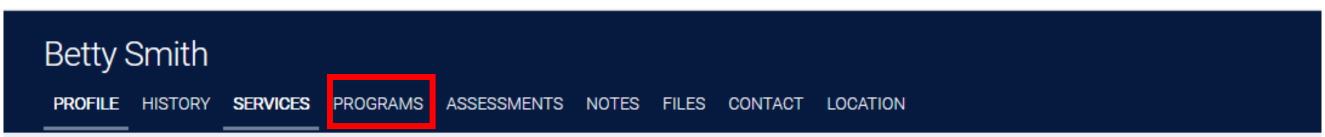
4. Review and add the client's **Contact Information.**



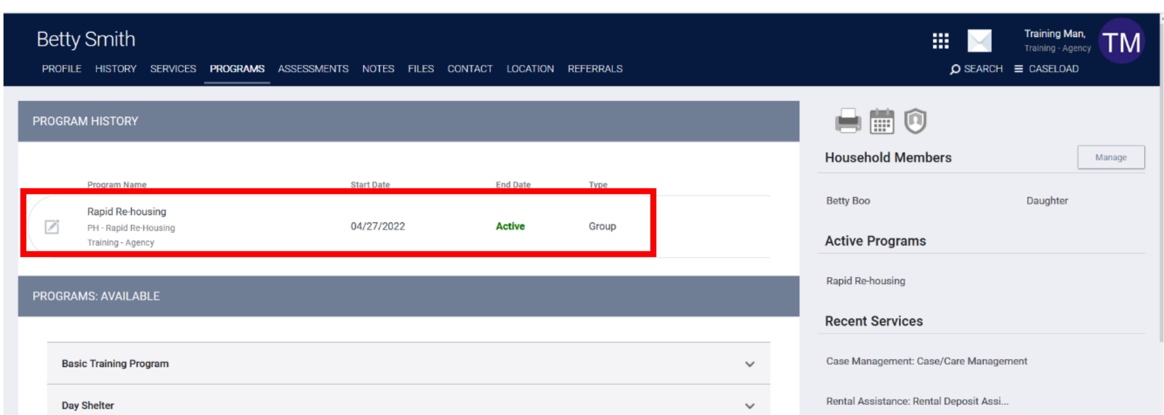
5. Review and add the client's **Location Information.**



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.



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

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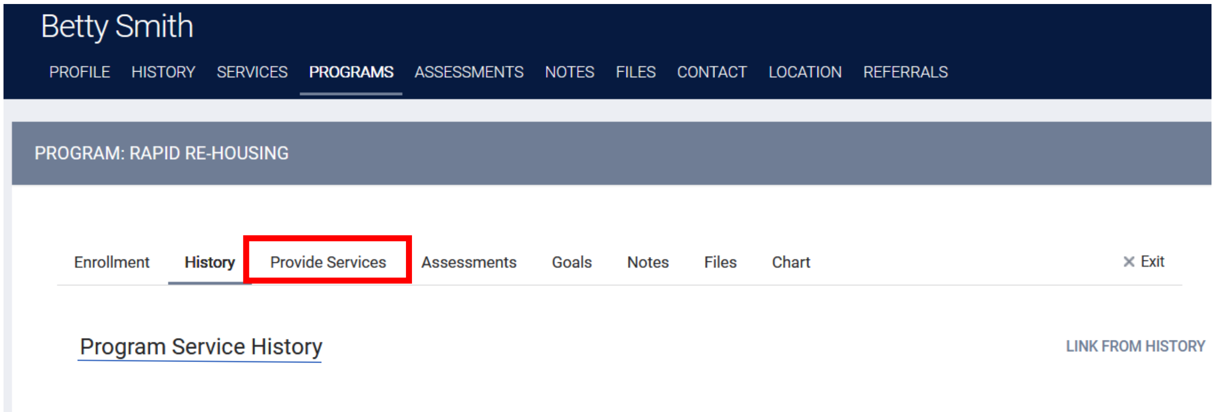
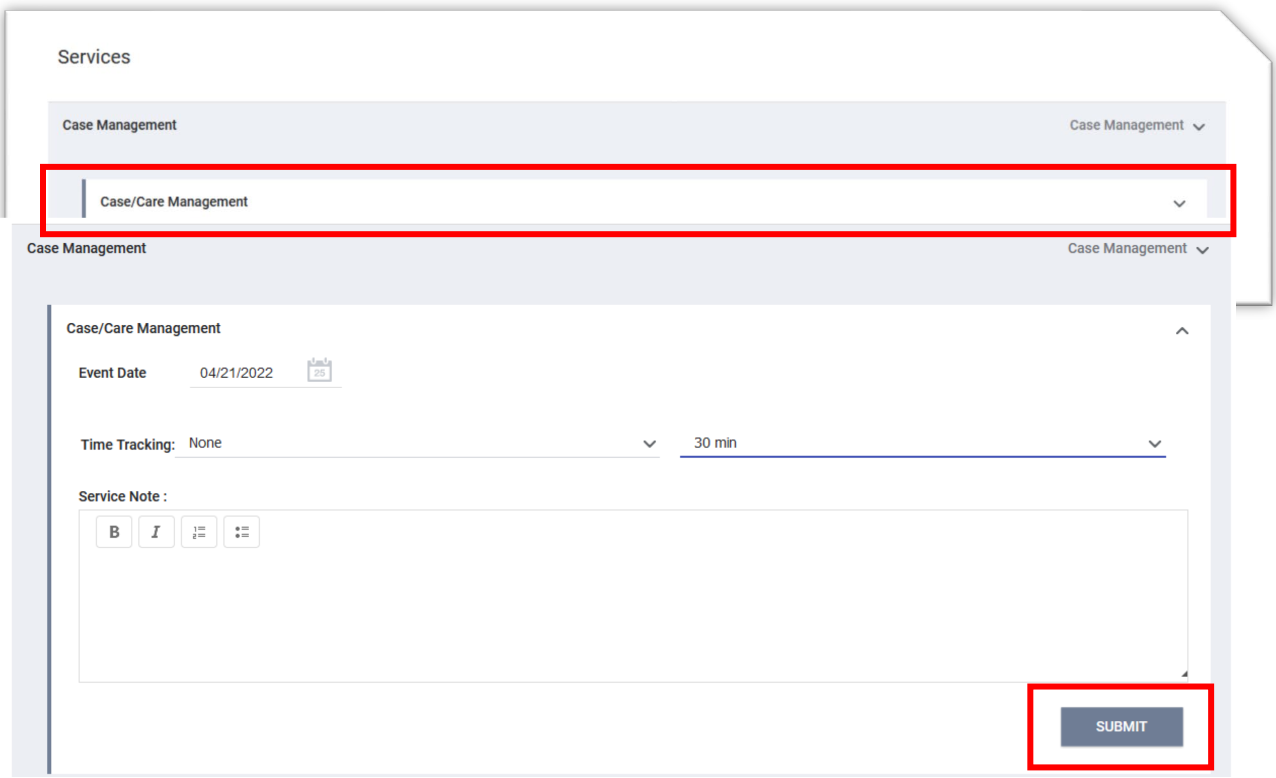


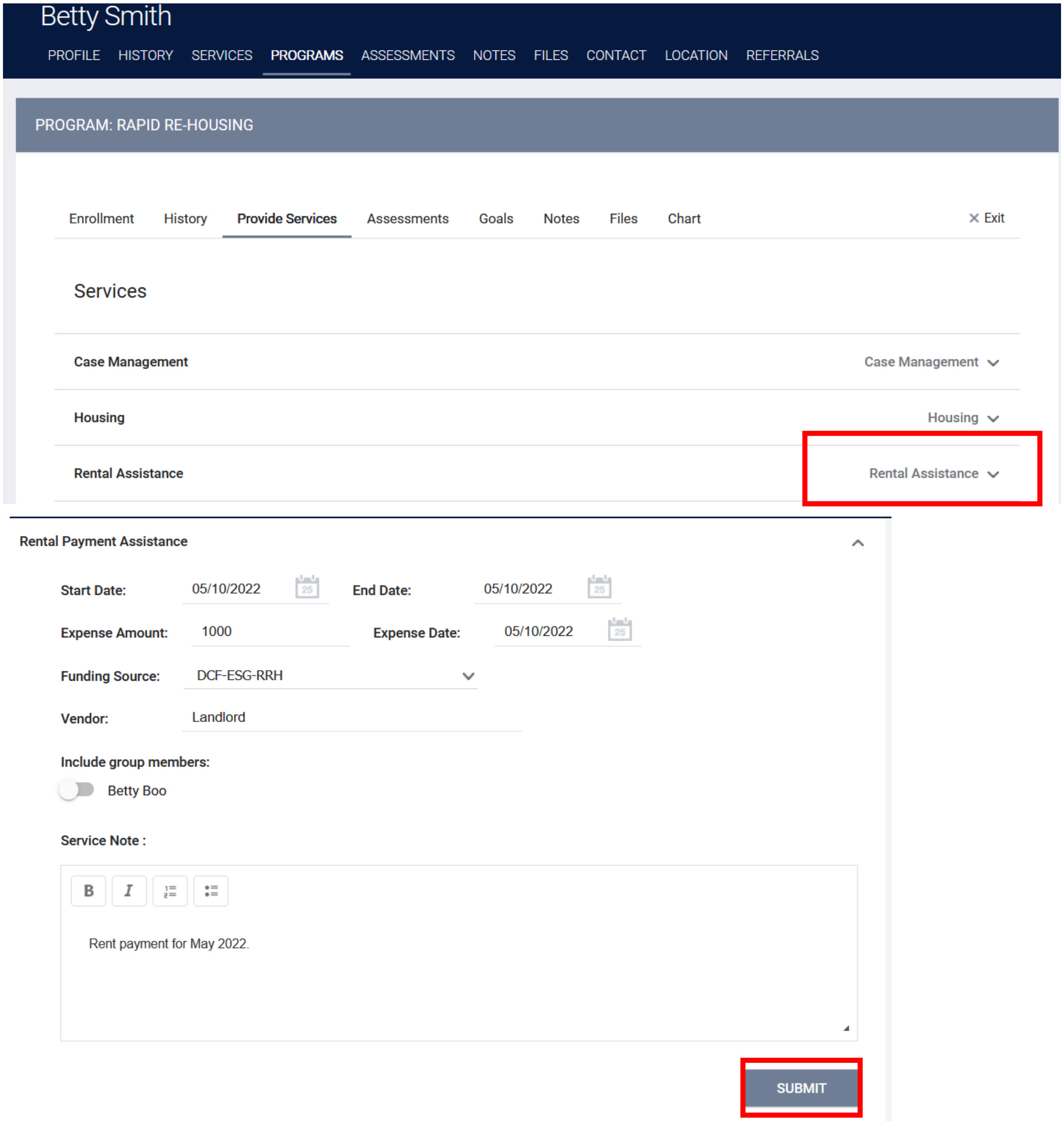
9. Select which service category you wish to provide client with by clicking the down arrow. This will open all available services under this category.
10. For case management services, you can time track if this is necessary for your program.

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



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.**



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