SERVICES – VIDEO COMPANION GUIDE

CaseWorthy Training & Documentation

Contents

Video Companion Guide Overview

The purpose of this Video Companion Guide is to assist Users in their understanding of the material which is covered in the Video Resource Guides for System Administrators. This is NOT a standalone Guide.

This guide is largely the script which was created for the video. Please know that the examples used in the guide are *parallel* to those in the video, but the process is the same. *For example*, the video might show Cynthia Brown receiving a service while the guide shows screenshots for Claire Davis. The recording of the service for Claire will follow the same procedure as Cynthia.

Each guide correlates with an entire video series. Each section of the guide corresponds with an individual video in the series.

This guide may be used:

- while watching the videos
- for reference while taking the class independently
- for reference after the implementation process
- as a reference when documenting custom configuration

As CaseWorthy is continually growing and expanding, the Video Companion Guides for System Administrators will be updated to show changes before the videos. Information, which is not included in the video, but is current in the CaseWorthy application will appear similar to the text below:

UPDATE: Text that follows this icon will be updates to the material that are not yet available in video format.

Overview of Services

The CaseWorthy *Services* video series includes information about the following topics:

- Administration
    - Overview of Services
    - Service Categories
    - Adding New Services
    - Services Action Gear
    - Linking Services to Programs
- Case Management
    - Manage Services Dashboard
    - Posting Services
- Indirect Services

The initial videos in this series identify how System Administrators configure services. The Case Management videos illustrate how to utilize the Manage Services and how to post or record services. The final video covers Indirect Services functionality in terms of both system configuration and recording indirect services.

This first video identifies what a service is and the two types of services available.

Services Defined

Services are the records of transactions which document the interaction between the agency and its Clients.

Types of Services

There are two types of services, direct and indirect.

A **direct service** is provided directly to or on behalf of the Client and is recorded as a service transaction on the Client record. In other words, “I know who I provided this service to.”

An **indirect service** is provided to or on behalf of a Client. Typically, the service is provided to individuals who are not independently tracked as unique and identifiable Clients.

The next video in this series will discuss why service categories are important, as well as how to create them.

Admin: Service Categories

This 2nd video of the CaseWorthy *Services* video series covers why service categories are important, as well as how to create them.

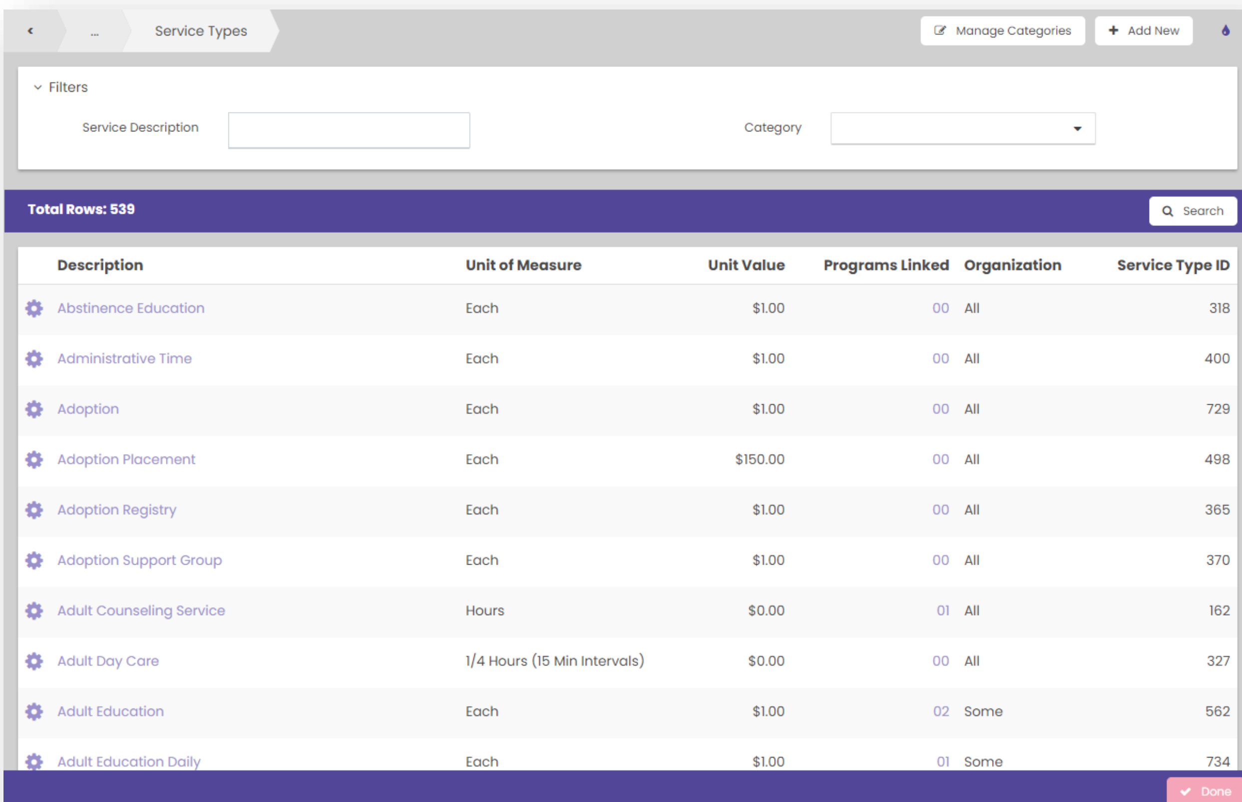
Importance of Categories

Categories play an important role for services. As with all categories, they allow for filtering in searches, queries, and reports but they are also linked to functionalities in other areas of CaseWorthy.

If a new category is needed, it should be created before creating the new service.

Manage Categories

To start managing service categories, navigate to Administration tab > Setup > Services.

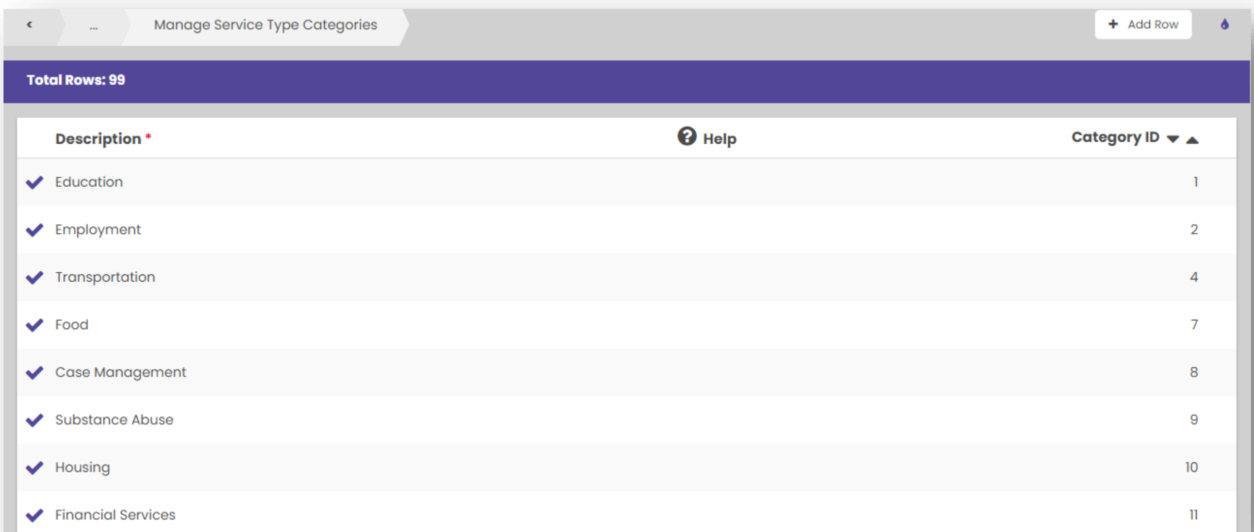


The *Service Types* form displays a list of baseline services available in CaseWorthy. The records can be filtered by description or by category at the top of the form.

NOTE: To have the list removed so that you can develop your own clean list of services, reach out to your Project Manager or Account Manager at CaseWorthy.

The top of the form includes the ability to filter the form results, add a new service, and manage categories.

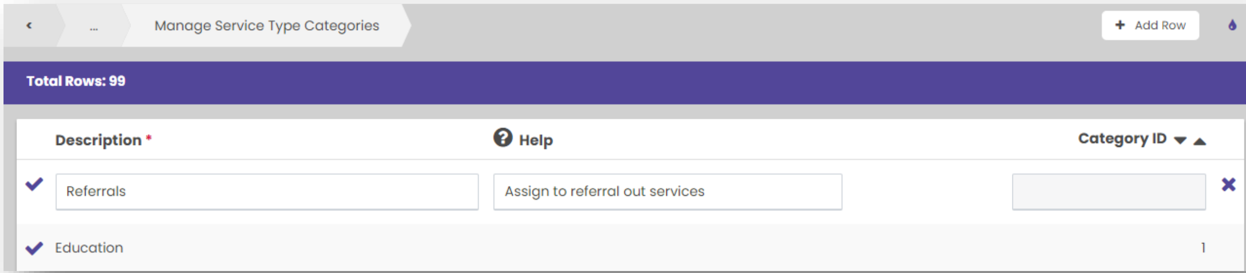
Let us begin with managing service categories. Click MANAGE CATEGORIES.



The categories you see here are those that are included in baseline, which means these will initially exist in your CaseWorthy database. These examples may provide a better idea of common ways to categorize services.

Some service categories are tied to functionality. Like with Organizations, Providers, and Users, a service can be associated with multiple categories. Service categories are especially designed for mapping service data to reports.

Adding a service category works the same way as adding other categories. (ADD ROW)



Give the category a distinguishing name, enter any appropriate help text, explaining why this category would be assigned, and the **Category ID** will be generated by the application when the form is saved.

If you need to edit a category name or its help text, select the record. If you need to delete a service category, click the **X**.

Click CANCEL to close the form without saving any changes. Click SAVE to save any edits or new entries.

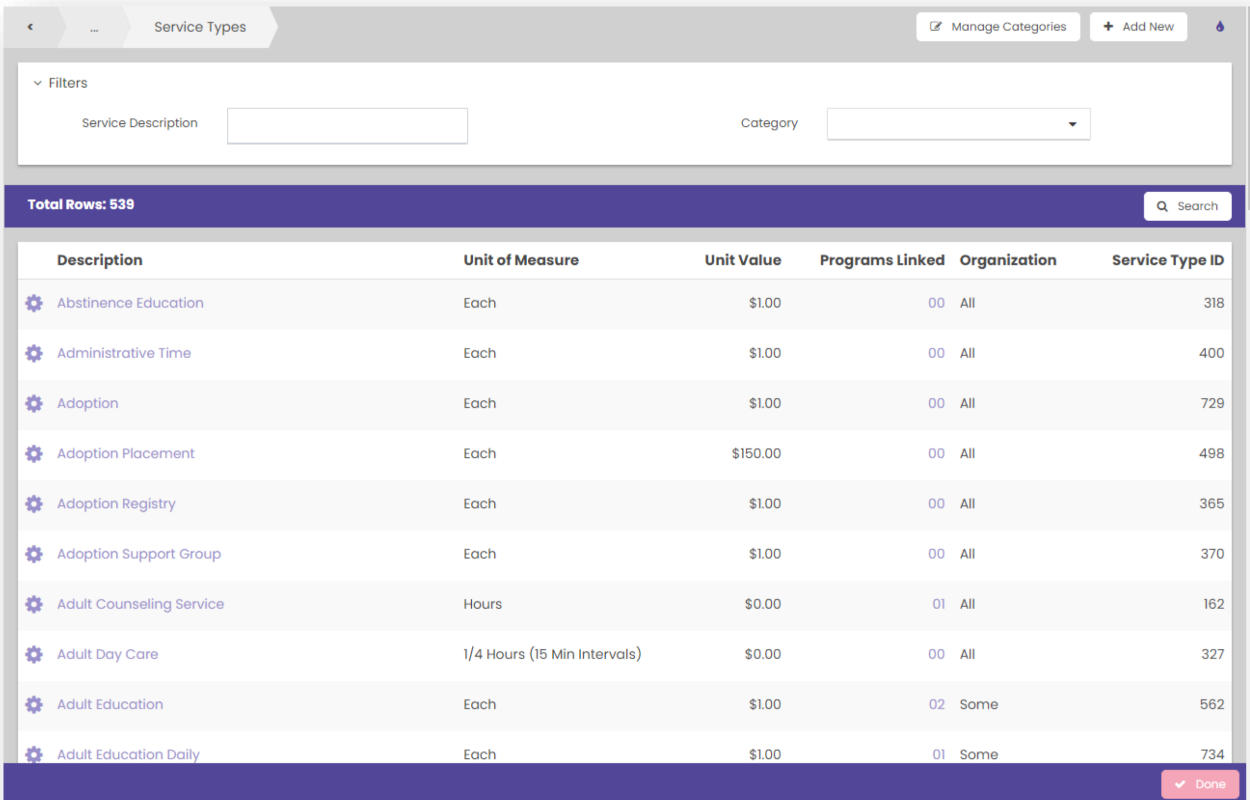
Next in the series, the *Adding New Services* video details how to create a new service and apply these categories.

Admin: Adding New Services

This 3rd video of the CaseWorthy *Services* video series details how to add a new service to the database.

Service Types Form

The *Service Types* form is similar to the other forms used with the MANAGE CATEGORIES and ADD NEW buttons at the top.



Description	Unit of Measure	Unit Value	Programs Linked	Organization	Service Type ID
Abstinence Education	Each	$1.00	00	All	318
Administrative Time	Each	$1.00	00	All	400
Adoption	Each	$1.00	00	All	729
Adoption Placement	Each	$150.00	00	All	498
Adoption Registry	Each	$1.00	00	All	365
Adoption Support Group	Each	$1.00	00	All	370
Adult Counseling Service	Hours	$0.00	01	All	162
Adult Day Care	1/4 Hours (15 Min Intervals)	$0.00	00	All	327
Adult Education	Each	$1.00	02	Some	562
Adult Education Daily	Each	$1.00	01	Some	734

See the *Service Categories* video to learn more about the MANAGE CATEGORIES button.

CaseWorthy is shipped with many baseline services. The records of services on this form can be filtered by **Service Description** or by **Category**.

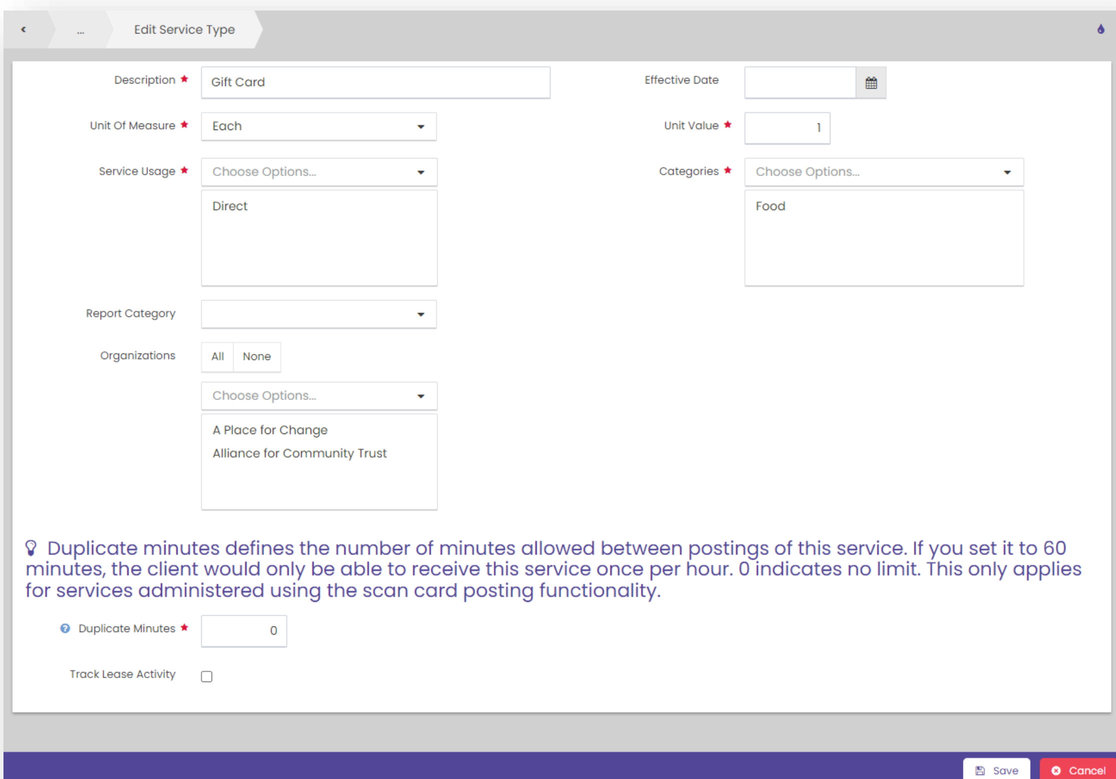
NOTE: To have the list removed so that you can develop your own clean list of services, reach out to your Project Manager or Account Manager at CaseWorthy.

The columns that display include:

- **Description**
- **Unit of Measure**
- **Unit Value**
- **Programs Linked**, which are how many programs are capable of using this service
- **Organization**
- **Service Type ID**, which is the unique identifier for this table, and it does not use billion numbering convention

Add a Service

Next, let us add a new service. Click ADD NEW.



The **Description** is used to name a specific service or service type. If services are similar but they have slightly different aspects, it is best to create them separately. This will ensure reports are accurate.

Effective Date is used if the unit value were to change. Updating the effective date will keep the previous date services reflecting the former value while allowing new date services to reflect the new value.

Unit of Measure & Unit Value

Unit of Measure and **Unit Value** work together.

Unit of Measure determines how the service will be measured and includes the following:

- Time items, which are typically used for case management or counseling types of services (units of times spent with a Client).
    - 'Days', which are often used for non-emergency shelters, like bed nights
    - 'Hours', 'Minutes', and partial hours
- 'Each' is used to record a number of times and is generally used most often as it keeps it generic. This is often used for a referral service, which is the most used.
- 'Dollar' can be used for financial services, but the specific amount can be entered when the service is entered, thus 'Each' is more likely to be used for things such as helping to pay utility bills.
- 'Mileage' includes transportation services
- 'Pounds' can be used for food banks, vouchers, and clothing banks

Unit Value defines the value associated with the unit of measure.

Service **Total** is the **Unit of Measure** multiplied by the number in **Unit Value**.

Service Usages

Service Usages are very important because they determine how services are used in the application. Multiple usages can be selected, and the first three are the most commonly used.

Direct Services

Direct means that the service is provided directly to or on behalf of the Client and is recorded as a service transaction on the Client record. In other words, you can say: "I know who I provided this service to."

IMPORTANT: Initially, baseline services do not have assigned usages. When configuring, be sure to add the 'Direct' usage to all services which will be recorded on Client records. If the service does not have 'Direct' usage, it will not be available to select when recording service, even though it is linked to the program.

Indirect Services

Indirect means that the service is provided to individuals who are not independently tracked. This can include an outreach event with many people. You might say "I don't know the people's names at the event" or, "The people are not Clients, and we do not know who they are." Another example is when a budgeting class is offered to the community and random people attend, including people not enrolled in a program.

The individuals can be identifiable Clients, but maybe you do not want to post services to each Client's record. Maybe just keeping track for record keeping purposes. For example, provide sack lunch or snacks for childcare or a workshop for a group of Clients.

An example of an indirect service that an Organization previously created was a service they titled Redirect. The agency found that they received a significant number of requests for help which they could not fulfill, but instead redirected the person in need to somewhere that could provide the help. The Organization created the indirect service of Redirect so that they could track the number of times they provided this recommended service.

Referral/Service Request

'Referral/Service Request' is an important aspect of the Service Request and the Referral functionality.

Other Service Usages

'Account – No Obligation & Obligation' are rarely used because financials are typically managed in a different application by a separate department.

'Account – Client Paid' tracks services for which the Client must contribute all or a portion of the payment.

'Time' is used by an employment training program who has piece work subcontracted to them.

'Medical Billing' is used for billing medical services and adds other necessary fields when selected.

Categories

Categories is mostly used to filter results on forms and reports to make the service easier to find. Categories will flag the service to appear on lists.

Some are required. For example, 'Internal Referrals' notes that the service is to be passed internally, and 'Job categories' work with job placement functionality. If 'Family Services' is selected, the service will only be able to be recorded for the Family and not for individuals.

Report Category is used for compliance reports to filter by category, often in custom reports. This is intentionally not a multi-select item so as to prevent services appearing multiple times on reports.

Organizations

Organizations allows for the service to be accessible to the Users of the selected Organization. Perhaps you have services that are very specific to a certain Organization's work but not necessary for other Organizations. This allows you to limit which Organizations have access.

Duplicate Minutes

Duplicate Minutes allows for preventing a service from being provided multiple times within a stated amount of time when using Scan Card functionality. This amount determines the number of minutes that are required between postings of the service on the Client's record.

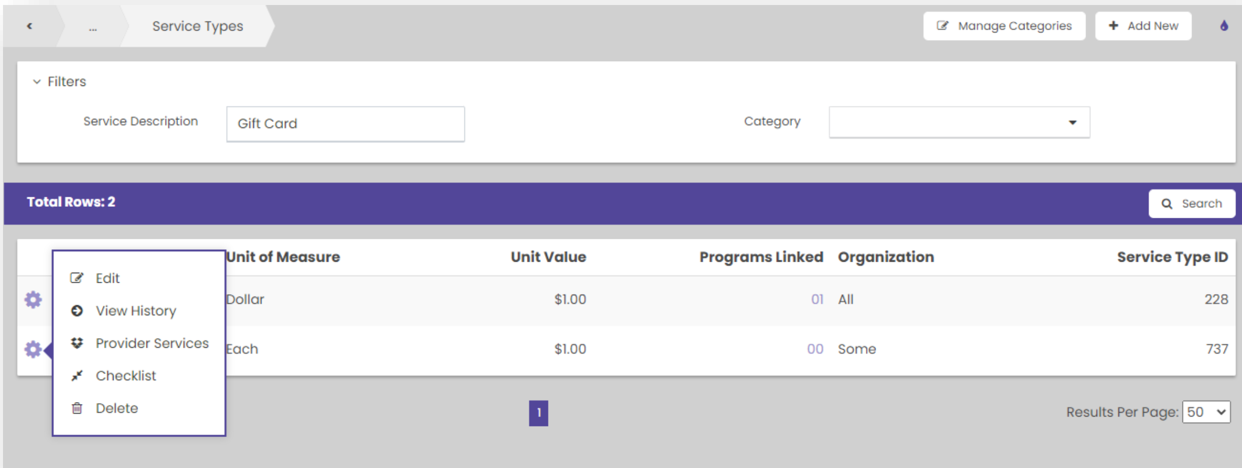
An example of when this is used is at a shelter that provides meal services and use scan cards to record the service. This will prevent a scan card from working if someone attempts to allow another person to utilize the card during the stated time period.

Track Lease Activity is used for services to track down payments on a mortgage or lease, for example.

Next in the series, the *Services Action Gear* video provides an overview of the menu options on the Services action gear.

Admin: Services Action Gear

This 4th video of the CaseWorthy *Services* video series provides an overview of the menu options on the Services action gear.



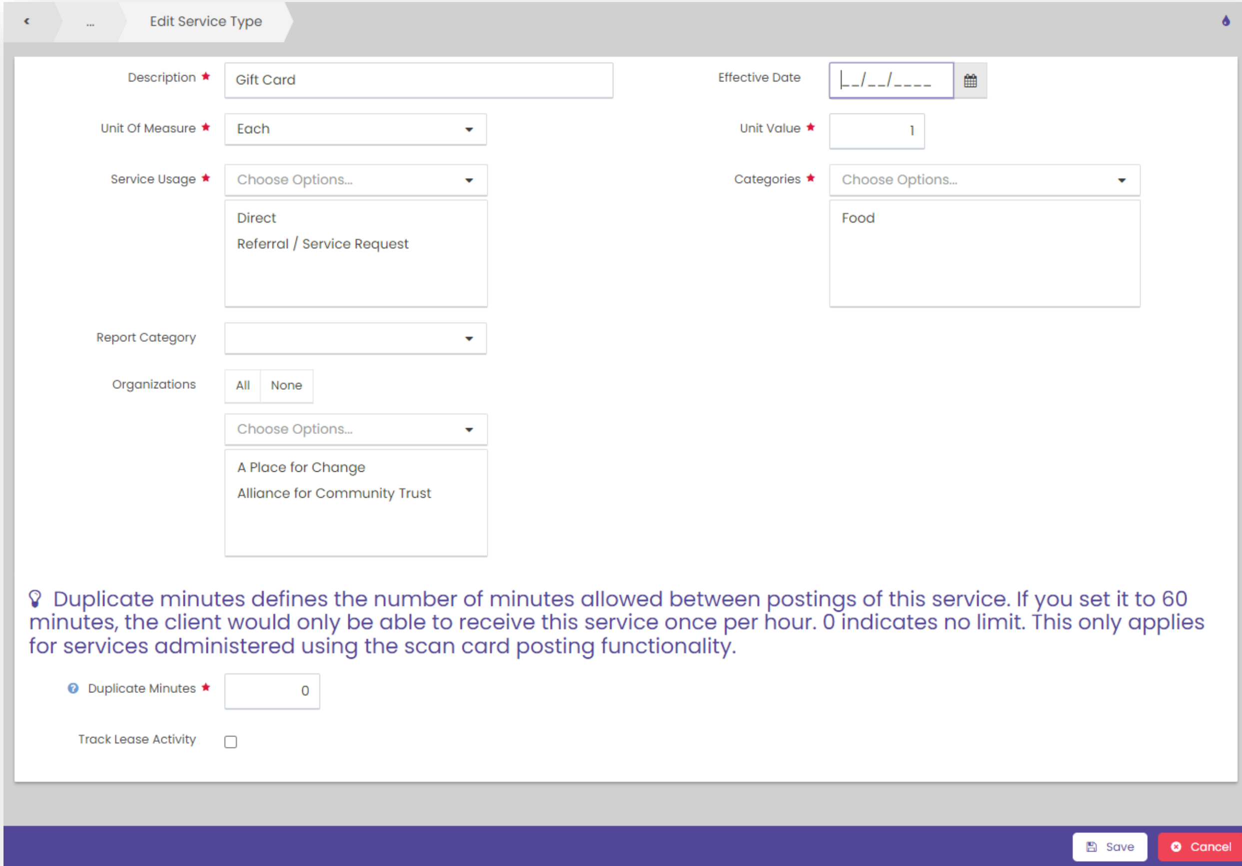
The *Service Types* form is similar to the other forms used with the MANAGE CATEGORIES and ADD NEW buttons at the top.

The *Service Types* form displays a list of all existing services for the Organization.

Off the action gear for each service:

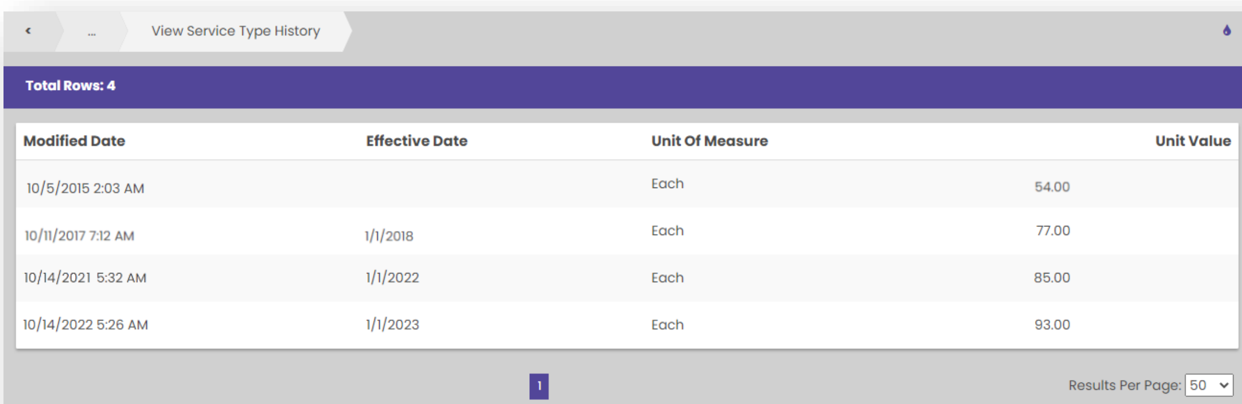
Edit

Select **Edit** to edit the details of the service.



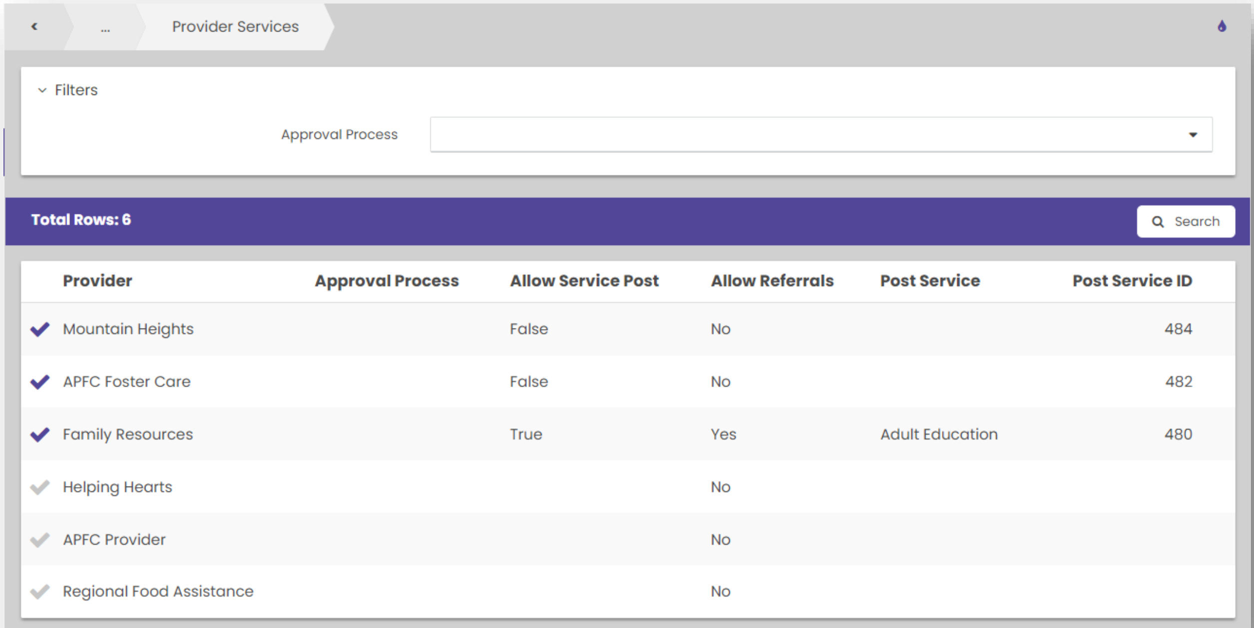
View History

Select **View History** to view a history of all changes made to the unit value.



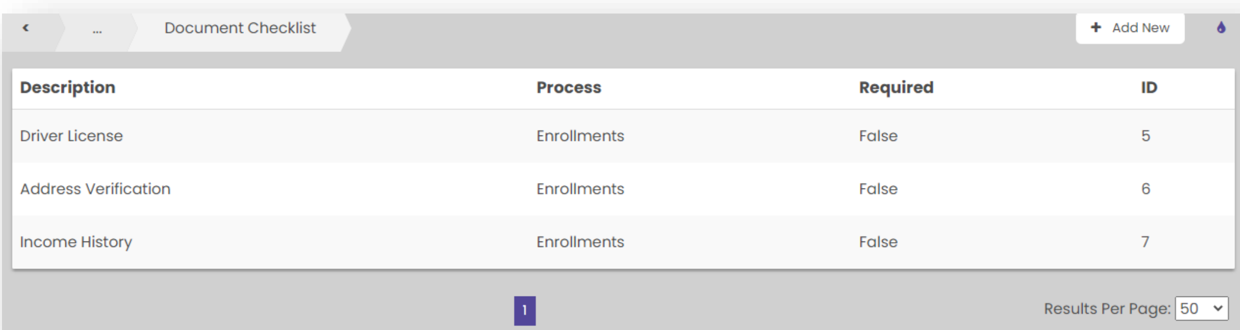
Provider Services

Select **Provider Services** to select which Providers should be linked to this service for service requests and referrals. This same link is available on the Provider's action gear.



Checklist

Select **Checklist** to view and add documents that can be tracked and that are collected over a period of time. Checklists can be helpful in ensuring necessary documents are collected from the Client.



Delete

Select **Delete** to delete the service from the database.

Next in the series, the *Linking Services to Programs* video provides details on how to link existing services to programs.

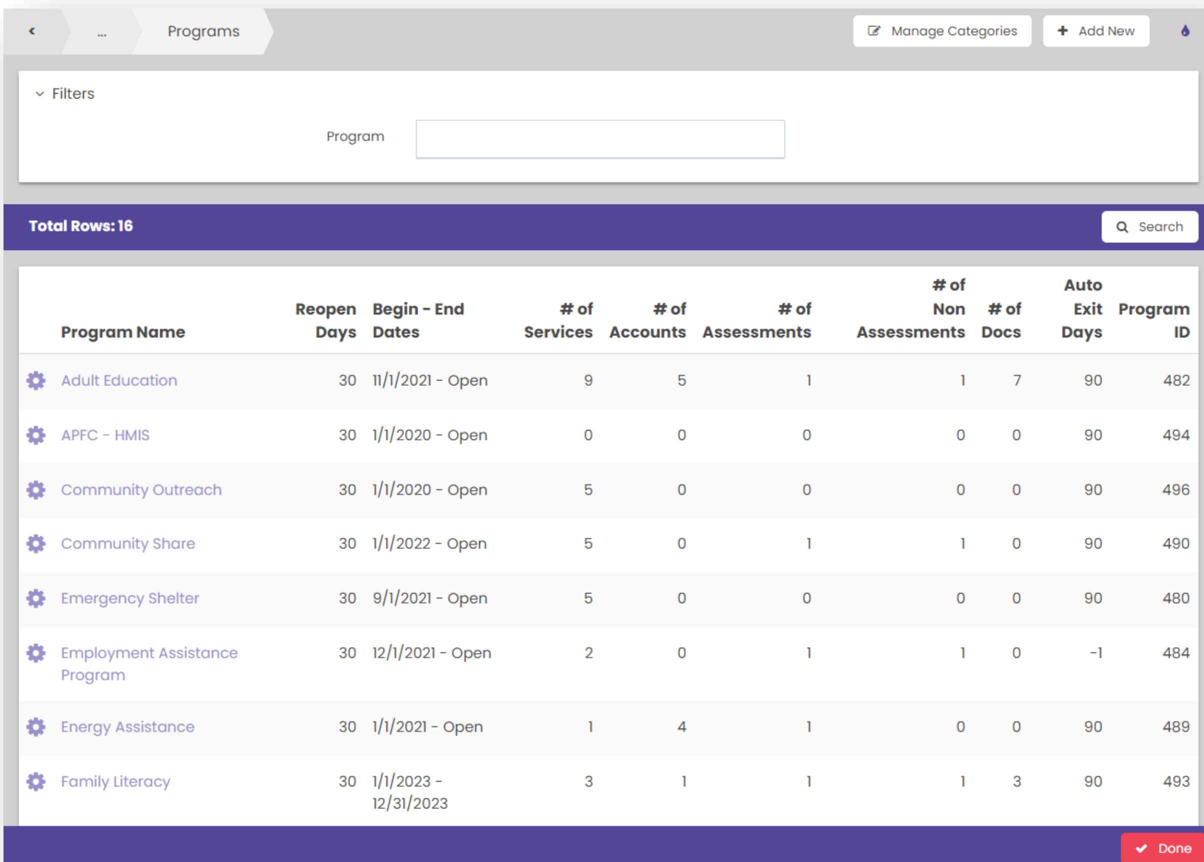
Admin: Linking Services to Programs

This 5th video of the CaseWorthy *Services* video series provides details on how to link existing services to programs.

The second step to setting up a service is to link the service to a program. Services cannot be used unless they are linked to programs.

IMPORTANT: If you are initially setting up your database, you may want to first create and configure all of your services and then link them to your programs, including baseline services such as adding a Service Usage of 'Direct'.

To link the service, navigate on the Administration tab. Select Setup, and then select Programs and Accounts. Select **Programs**. And then a list of all existing programs are displayed.

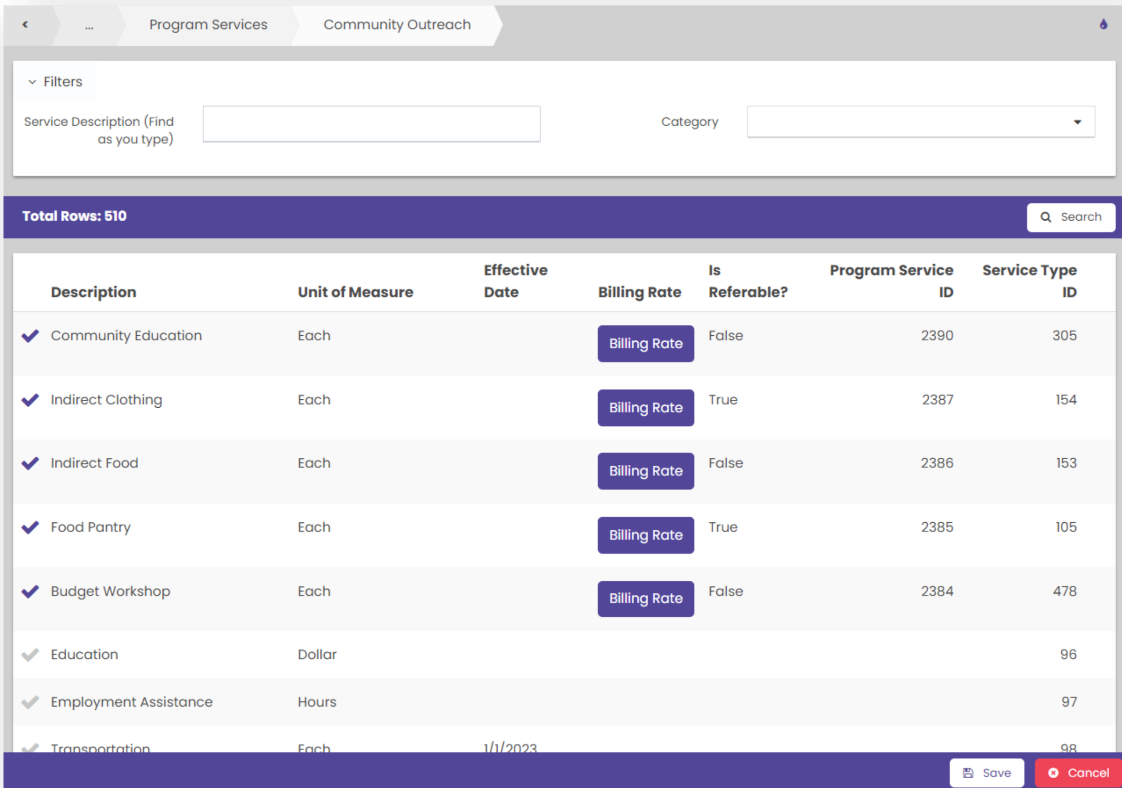


Program Name	Reopen Days	Begin - End Dates	# of Services	# of Accounts	# of Assessments	# of Non Assessments	# of Docs	Auto Exit Days	Program ID
Adult Education	30	11/1/2021 - Open	9	5	1	1	7	90	482
APFC - HMIS	30	1/1/2020 - Open	0	0	0	0	0	90	494
Community Outreach	30	1/1/2020 - Open	5	0	0	0	0	90	496
Community Share	30	1/1/2022 - Open	5	0	1	1	0	90	490
Emergency Shelter	30	9/1/2021 - Open	5	0	0	0	0	90	480
Employment Assistance Program	30	12/1/2021 - Open	2	0	1	1	0	-1	484
Energy Assistance	30	1/1/2021 - Open	1	4	1	0	0	90	489
Family Literacy	30	1/1/2023 - 12/31/2023	3	1	1	1	3	90	493

Off the action gear, select **Program Service**.

All services, including those that have been developed for baseline, are displayed.

Use the filter at the top of the form to filter the list by **Service Description** or **Category**.



Select the services to link to the program.

Click SAVE.

IMPORTANT: Important notes to remember:

- Only services that have been linked to a program can be directly assigned to a Client enrolled in the program.
- Clients can receive a service posting without being enrolled through resource usages.

- Services can be recorded for a Client even if the enrollment status is ‘Assessments Pending’.

Next in the series, the *Manage Services Dashboard* video explores the *Services* dashboard.

UPDATE: **Is Referrable** is used for Program Referral functionality. See the *Referral* video series for full details.

Case Management: Manage Services Dashboard

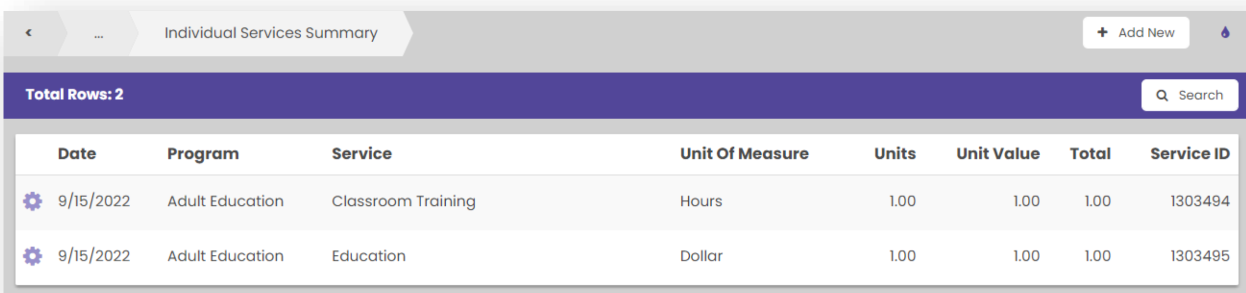
This 6th video of the CaseWorthy *Services* video series explores the *Manage Services* dashboard.

To access the dashboard, navigate to the Case Management tab. Select Case Management, and then select Services.

The *Manage Services* dashboard displays with menu links on the left and queries on the right.

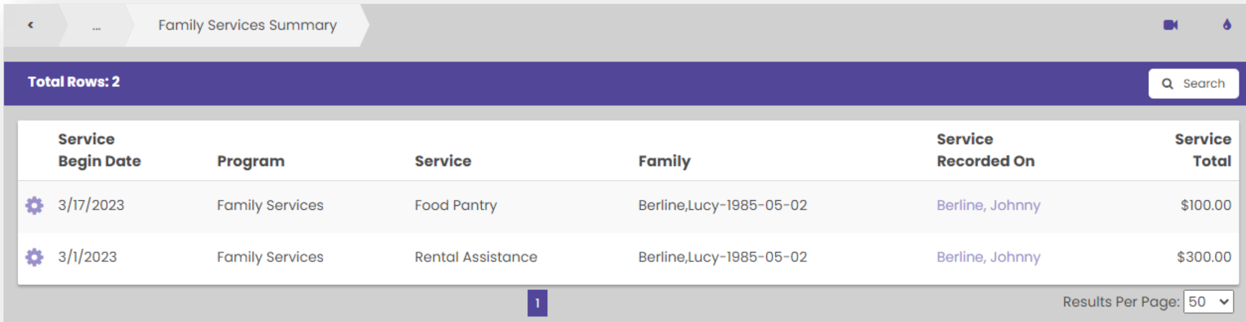
Service Management

Individual Services is both a menu option and a query on the dashboard. The menu allows you to post services to both family and individuals. The query displays a list of the most recently posted services.



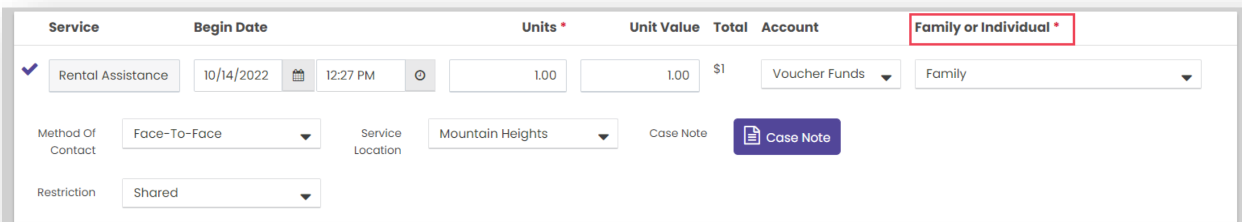
Date	Program	Service	Unit Of Measure	Units	Unit Value	Total	Service ID
9/15/2022	Adult Education	Classroom Training	Hours	1.00	1.00	1.00	1303494
9/15/2022	Adult Education	Education	Dollar	1.00	1.00	1.00	1303495

Family Services allows you to display the services which were provided to the family as a whole. The service will only appear on this form for the Head of Household of the enrollment but will appear in the Family Service query for all family members.

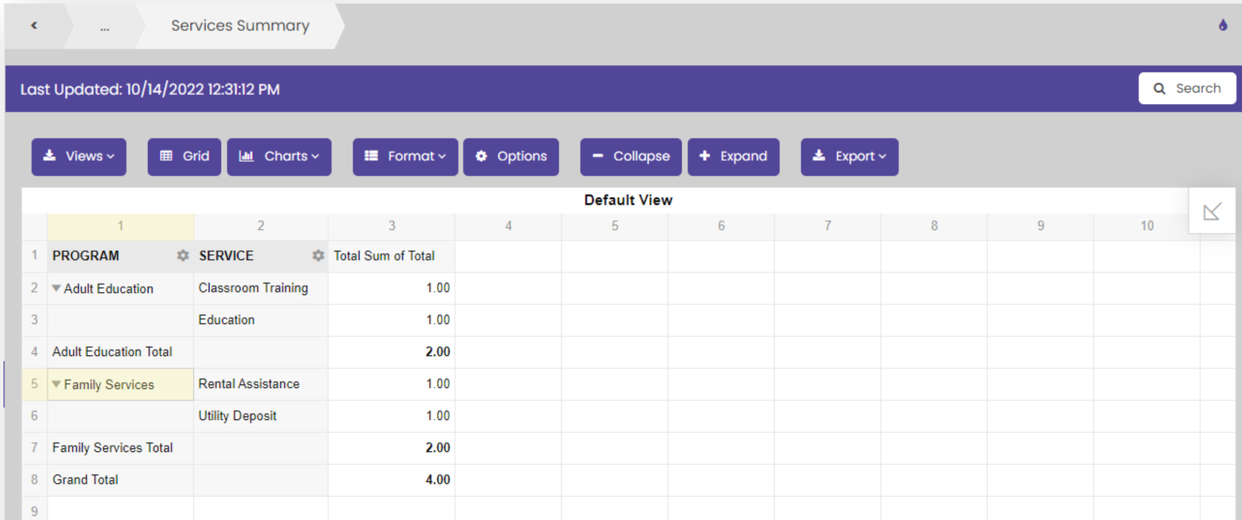


UPDATE: The family service can be edited or deleted from the record's action gear.

When recording the service, in **Family or Individual** 'Family' is selected.

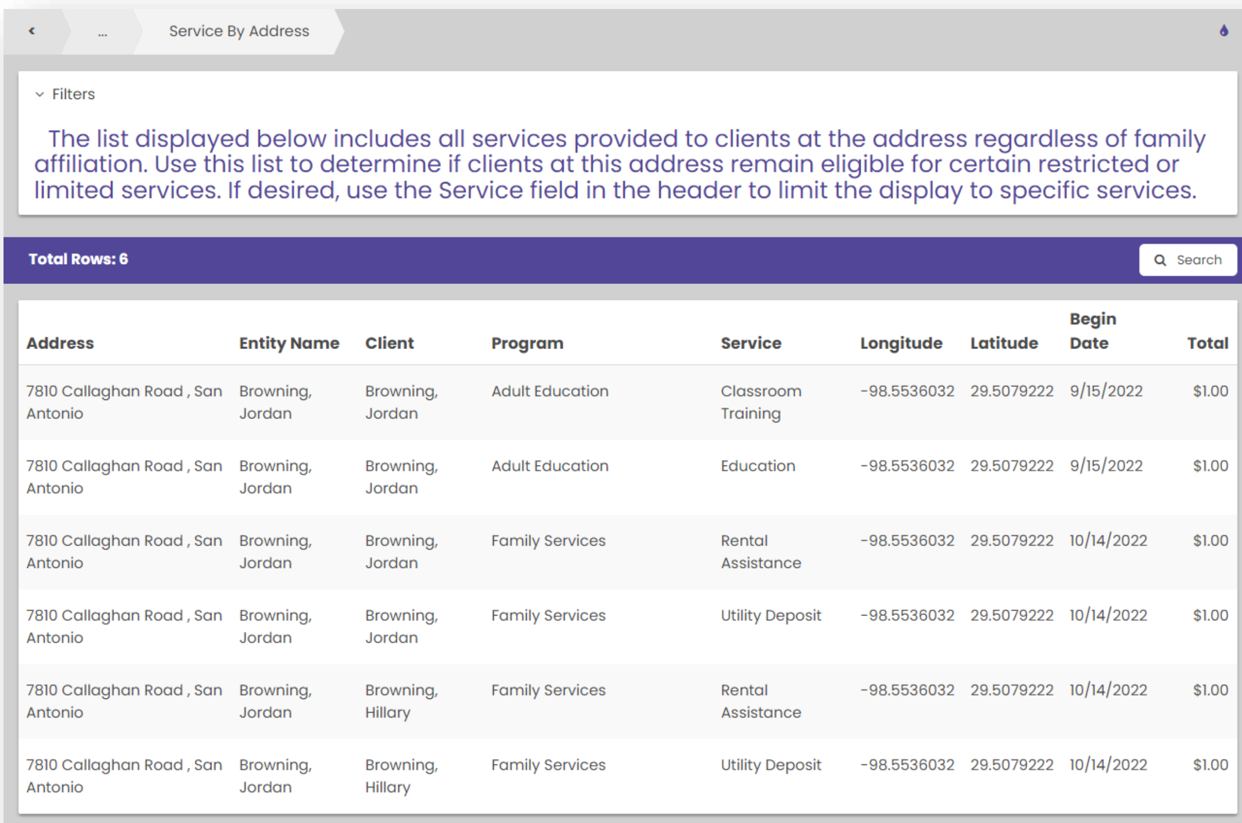


Individualized Services – Analytics sends data to a pivot table, which allows you to manipulate service posting data.



	PROGRAM	SERVICE	Total Sum of Total
2	Adult Education	Classroom Training	1.00
3		Education	1.00
4	Adult Education Total		**2.00**
5	Family Services	Rental Assistance	1.00
6		Utility Deposit	1.00
7	Family Services Total		**2.00**
8	Grand Total		**4.00**

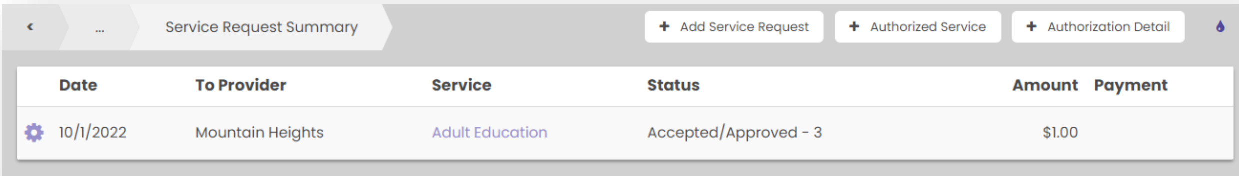
Services by Client Address displays a list of all services provided to Clients by address, regardless of family affiliation.



Address	Entity Name	Client	Program	Service	Longitude	Latitude	Begin Date	Total
7810 Callaghan Road , San Antonio	Browning, Jordan	Browning, Jordan	Adult Education	Classroom Training	-98.5536032	29.5079222	9/15/2022	$1.00
7810 Callaghan Road , San Antonio	Browning, Jordan	Browning, Jordan	Adult Education	Education	-98.5536032	29.5079222	9/15/2022	$1.00
7810 Callaghan Road , San Antonio	Browning, Jordan	Browning, Jordan	Family Services	Rental Assistance	-98.5536032	29.5079222	10/14/2022	$1.00
7810 Callaghan Road , San Antonio	Browning, Jordan	Browning, Jordan	Family Services	Utility Deposit	-98.5536032	29.5079222	10/14/2022	$1.00
7810 Callaghan Road , San Antonio	Browning, Jordan	Browning, Hillary	Family Services	Rental Assistance	-98.5536032	29.5079222	10/14/2022	$1.00
7810 Callaghan Road , San Antonio	Browning, Jordan	Browning, Hillary	Family Services	Utility Deposit	-98.5536032	29.5079222	10/14/2022	$1.00

Service Requests

Service Requests allows you to add a service request.



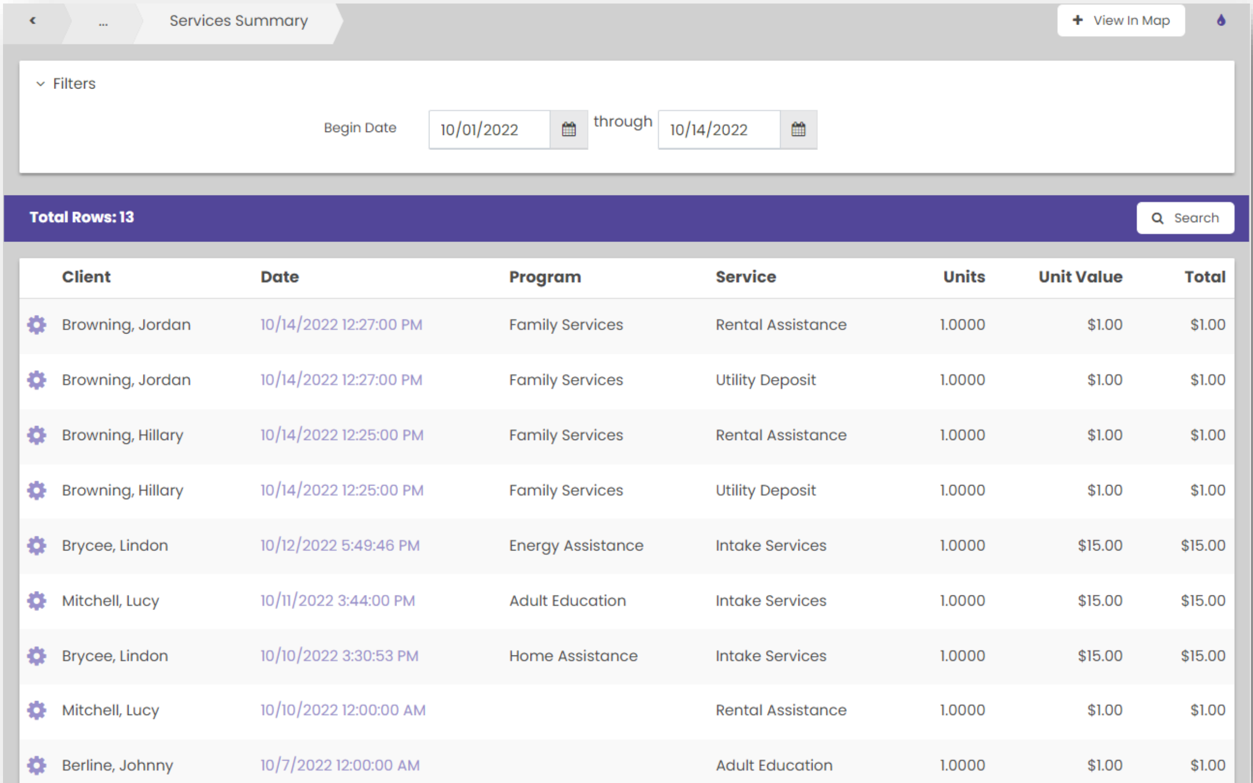
Service Request – Authorizations allows you to enter service requests that are associated with authorizations.

See the Service *Requests and Authorizations* video series for details on both these functionalities.

Other Service Forms

Batch Charge Entry Summary focuses on Medical Billing functionality and can be discussed further with your Program or Account Manager if utilized.

Service Summary (All) includes a summary report that displays all service transactions recorded by the User for a selected date range.



Client	Date	Program	Service	Units	Unit Value	Total
Browning, Jordan	10/14/2022 12:27:00 PM	Family Services	Rental Assistance	1.0000	$1.00	$1.00
Browning, Jordan	10/14/2022 12:27:00 PM	Family Services	Utility Deposit	1.0000	$1.00	$1.00
Browning, Hillary	10/14/2022 12:25:00 PM	Family Services	Rental Assistance	1.0000	$1.00	$1.00
Browning, Hillary	10/14/2022 12:25:00 PM	Family Services	Utility Deposit	1.0000	$1.00	$1.00
Brycee, Lindon	10/12/2022 5:49:46 PM	Energy Assistance	Intake Services	1.0000	$15.00	$15.00
Mitchell, Lucy	10/11/2022 3:44:00 PM	Adult Education	Intake Services	1.0000	$15.00	$15.00
Brycee, Lindon	10/10/2022 3:30:53 PM	Home Assistance	Intake Services	1.0000	$15.00	$15.00
Mitchell, Lucy	10/10/2022 12:00:00 AM		Rental Assistance	1.0000	$1.00	$1.00
Berline, Johnny	10/7/2022 12:00:00 AM		Adult Education	1.0000	$1.00	$1.00

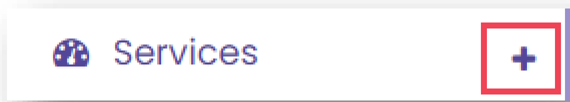
Next in the series, the *Posting Services* video details how to post a service.

Case Management: Posting Services

This seventh video of the CaseWorthy *Services* video series details how to post a service.

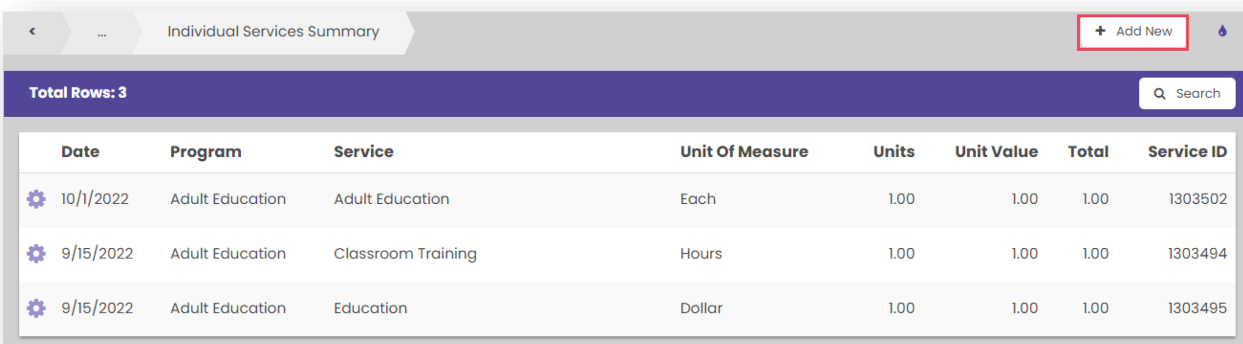
Jump Button Feature

On the Case Management tab, navigate to Case Management, and then Services.



Before selecting Services, notice the jump button feature that allows you to jump directly to the *Service Spreadsheet* where you can quickly add a service, bypassing selecting other menu options.

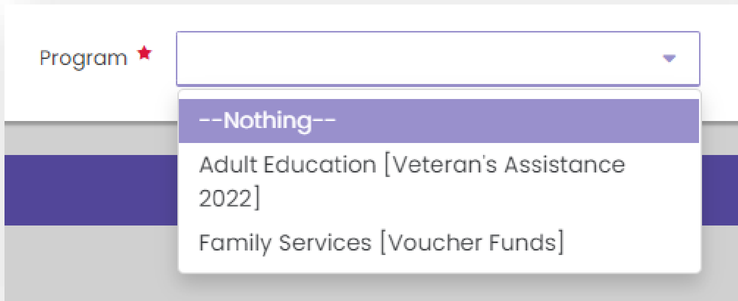
To access this form through the menu, select Services on the Case Management navigation menu, and then select **Individual Services** on the *Manage Services* dashboard. Click ADD NEW.



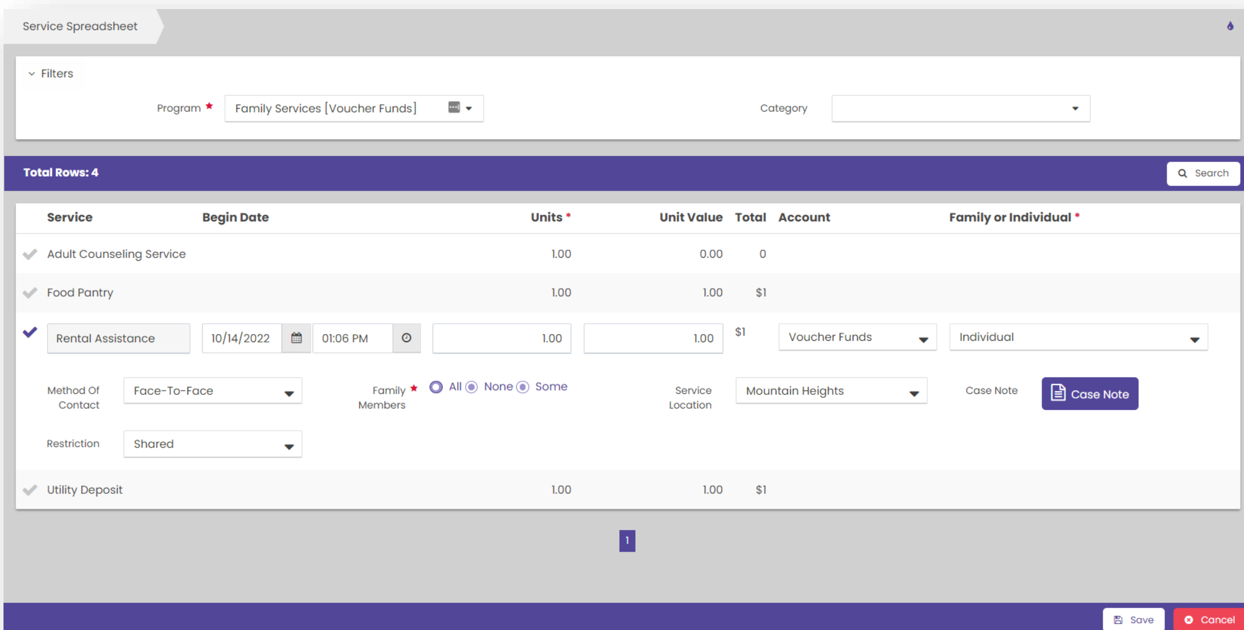
Date	Program	Service	Unit Of Measure	Units	Unit Value	Total	Service ID
10/1/2022	Adult Education	Adult Education	Each	1.00	1.00	1.00	1303502
9/15/2022	Adult Education	Classroom Training	Hours	1.00	1.00	1.00	1303494
9/15/2022	Adult Education	Education	Dollar	1.00	1.00	1.00	1303495

Manually Record a Service

Once on the *Service Spreadsheet*, select the **Program** from the dropdown. The programs that appear here are only those that the Head of Household is currently enrolled in.



The services that appear are only those that are linked to the program that also have a usage type of 'Direct'.



The **Begin Date** and time should be the service created date, and default to the current date and time.

Enter the number of **Units**, where **Units** x **Unit Value** = **Total**.

Select the **Account** from the dropdown, which is the funding source. The accounts that appear in the dropdown are linked to the selected program.

Family or Individual

The **Family or Individual** dropdown works in correspondence with the Family Members field:

Family

'Family' includes a service that serves an entire family as a whole. The posting will only appear on the Head of Household's record under **Family Services**. If selected, the Family Members field does not apply and is hidden.

NOTE: If the service includes the Family Services category, Family will be the only option when recording the service.

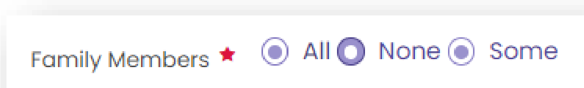
Individual

Selecting 'Individual' allows for more options. When selecting 'Individual', the User is then able to post this service transaction across family members without requiring the User to go into each family member's record individually. When selected, **Family Members** is required.

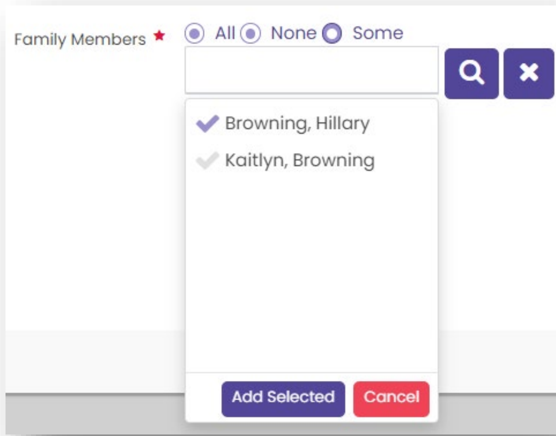
The **Family Members** option allows for selecting:

'All' wherein the active Client and every family member who is enrolled in the selected program will receive a service positing.

'None', where only the active Client will receive a service posting.



‘Some’, where the active Client and other family members that are enrolled in the program will each receive a service posting. When selecting ‘Some’, utilize the lookup feature to see other family members.



Other Services Fields

For **Method of Contact**, select how the service was provided.

The **Service Location** includes the Provider list, which is based on the program list. Multiple Providers may offer one program. For example, a food kitchen program that is offered by multiple Provider locations.

Case Note allows you to add a case note for a service posting.

The **Restriction** honors the Organization’s level of data sharing configuration.

Automatically Posting a Service

There are also various functionalities within CaseWorthy that automatically post services.

These include workflows, resource usages, case notes, approved service requests, and Provider referrals.

Next in the series, we cover the Indirect Services functionality

Indirect Service Functionality

In this final video of the *Services* video series, we will cover the database configuration that is necessary for using the Indirect Service functionality as well as how indirect services are recorded.

Indirect Services are like direct services in that they are records of service transactions provided to individuals. Indirect services are different in that the individuals who receive the service are not identified while direct services are recorded in association to specific Clients.

For example, indirect services may be used to record the number of snacks provided during an event, the number of people who attend an outreach event, or the number of community members who attend a workshop.

Database Configuration

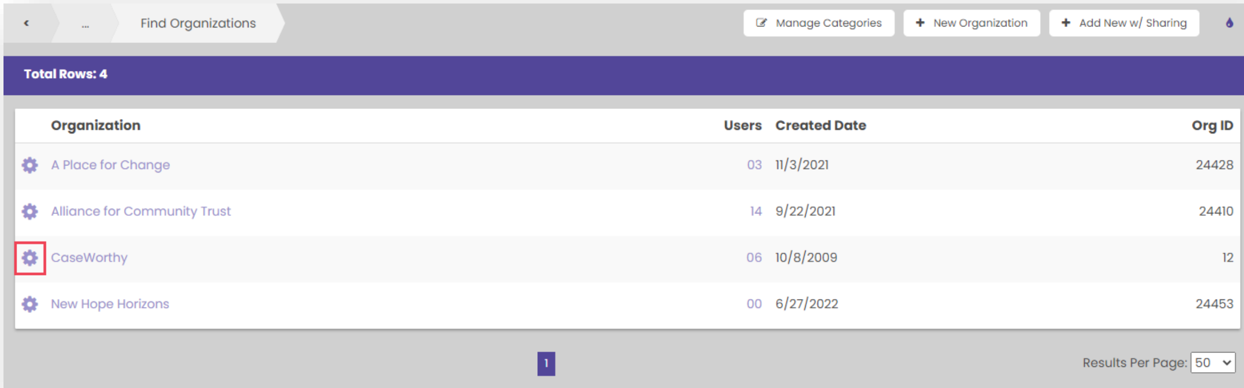
Indirect Service functionality requires data sharing, service configuration, program configuration and an enrollment to be recorded.

Data Sharing

Indirect Services are recorded for a unique Client record which is included in your CaseWorthy database when it is first received.

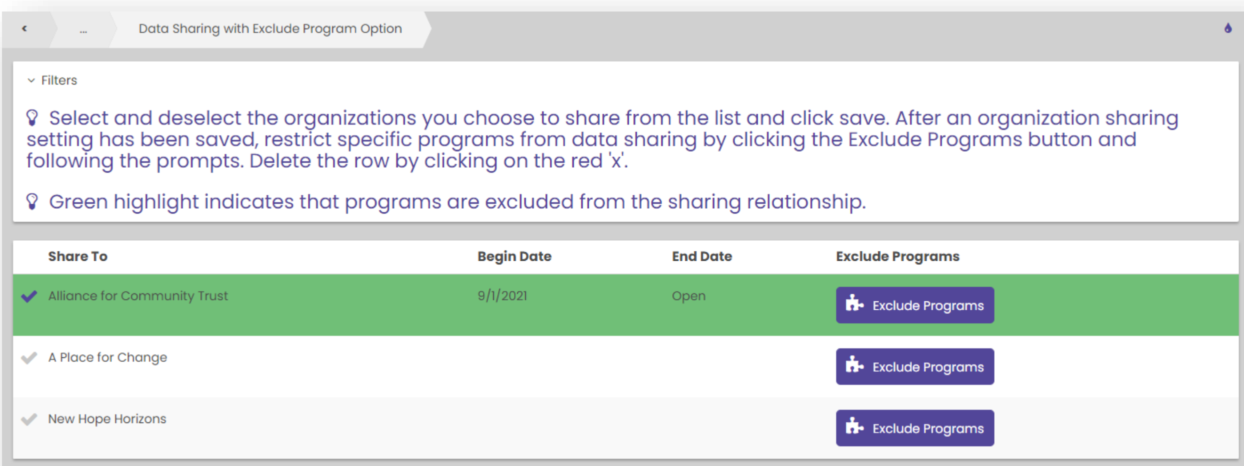
This unique Client record belongs to the CaseWorthy Organization. In order to access this Client record, the CaseWorthy Organization must have a data sharing relationship established to share its data with all Organizations which will record indirect services.

Organization Data Sharing relationships are managed on the Administration tab through Setup and Organizations.



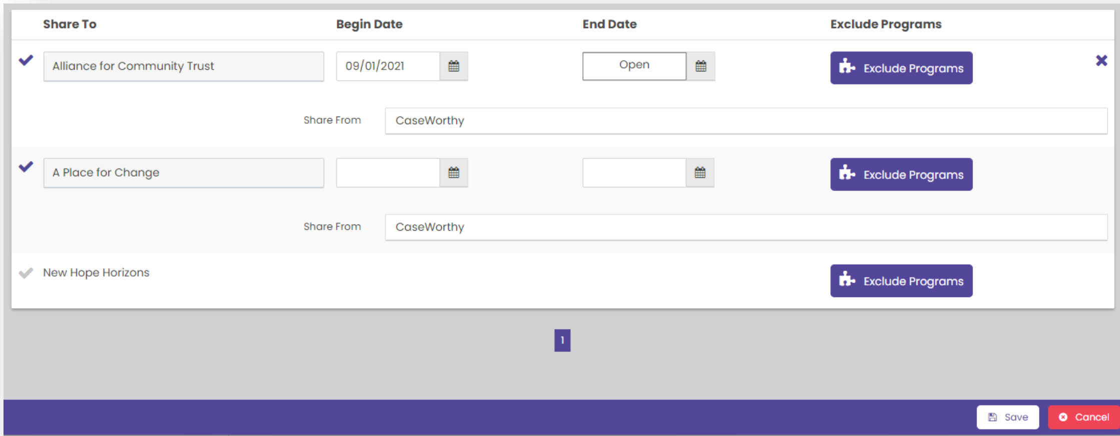
The CaseWorthy Organization record is included in your database primarily to allow access for CaseWorthy resources to troubleshoot and assist with issues you encounter. It is also necessary for Indirect Service functionality. Without the CaseWorthy Organization, the baseline functionality will not work.

Since we need to have CaseWorthy share with the Organizations that represent our agencies, we will access **Data Sharing** from CaseWorthy's action gear.



Here I can see which Organizations CaseWorthy shares data.

If Users of other Organizations need to record Indirect Services, select them here.



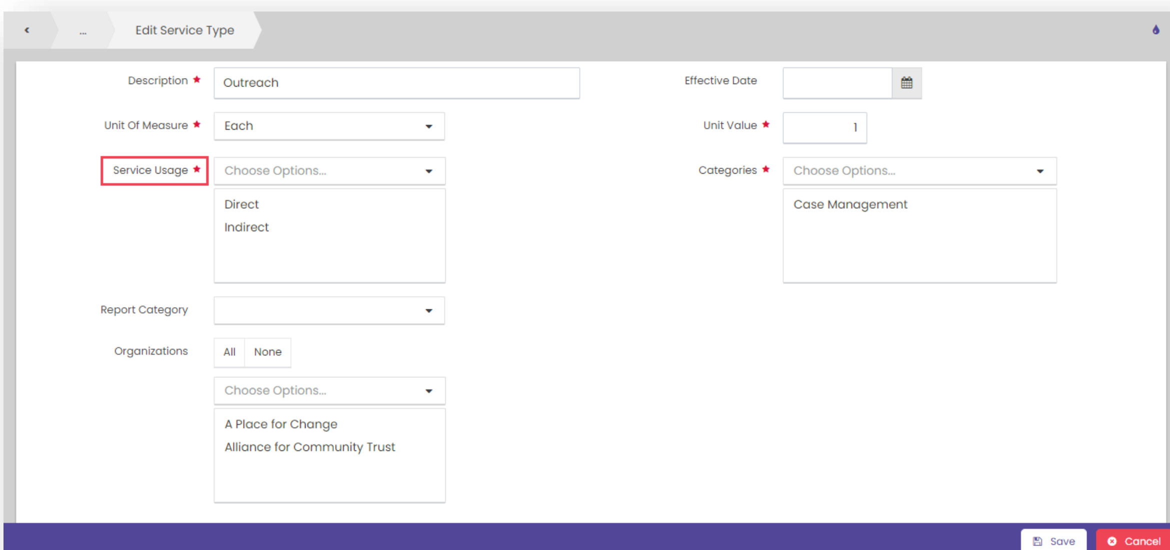
See the *Organization* video series to learn more about Data Sharing functionality.

Service Configuration

Services also need to be configured for Indirect Service functionality and the service needs to be associated with the program.

Service

Still on the Administration tab, navigate to Setup and Services. I'm going to update an existing service.



The service must have the **Service Usage** 'Indirect'.

Generally, it is also important to ensure that the service is available to the necessary **Organizations**.

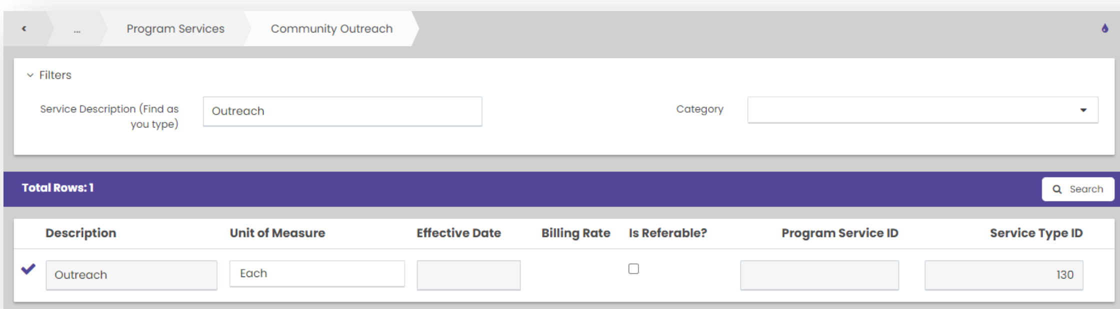
Update all services which will be used to record indirect services.

Program Service

Next, the indirect services need to be associated with the necessary programs.

On the Administration tab navigate to Setup, Programs and Accounts, and **Programs**.

From the program's action gear select **Program Service**.



Search for the service, select it, and SAVE.

This would be a good time to ensure the Program is available to the necessary Organizations.

Enroll the Indirect Client

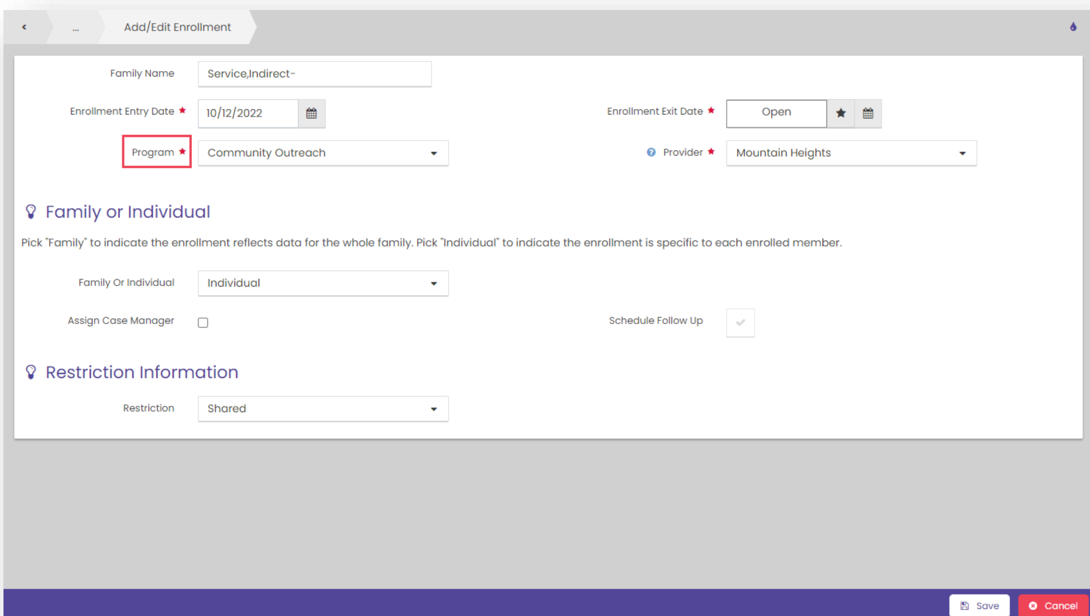
The last step in the setup is to enroll the Indirect Client into the program which provides the indirect service.

On the Case Management tab, use Find Client to access the Indirect Client record. You can search by Client ID ‘3’ and the record will automatically load.

TIP: If the Indirect Client record is not available, review the *[Data Sharing]* portion of this video.

From Case Management in the Navigation Menu select Program Enrollments. and **Program Enrollments**.

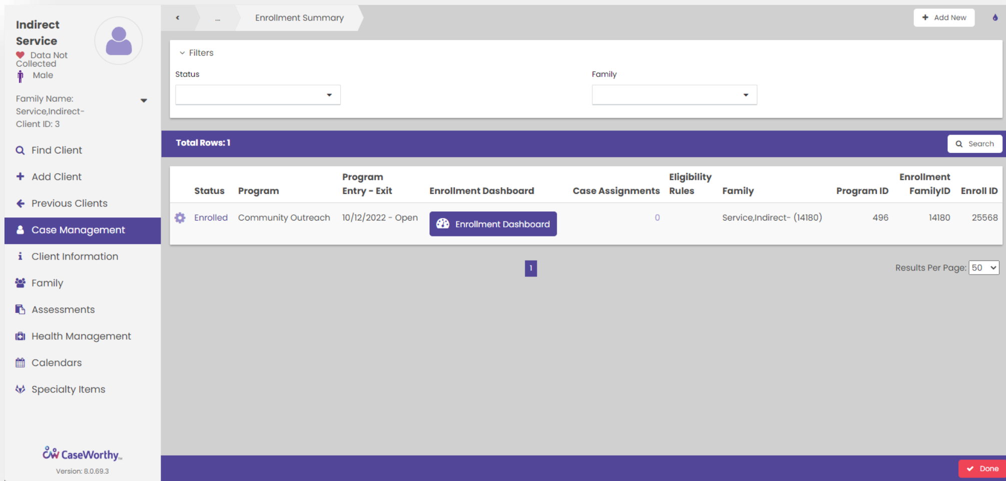
Enrolling the Indirect Client does not require completing assessments or other steps that are typically necessary for Clients. Just click ADD NEW.



Select the **Program**.

TIP: If the Program is not available, check the Program setup to ensure it is available to the Organization in which you are working as displayed in the User Corner.

SAVE the enrollment.



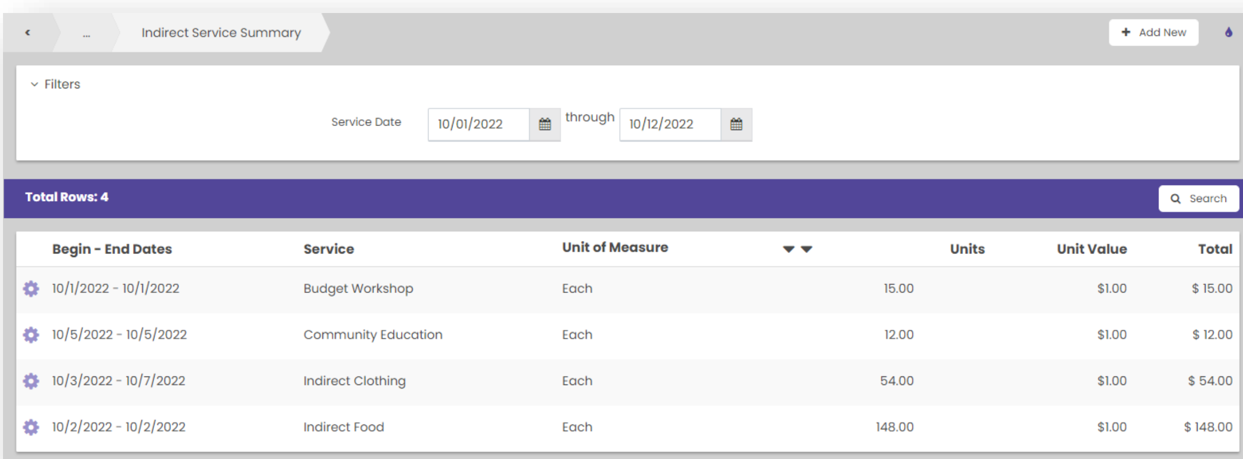
Now Indirect Services which are associated to this program can be recorded.

Recording Indirect Services

Indirect Services are recorded using the My CaseWorthy tab.

Select Indirect Services from the Navigation Menu.

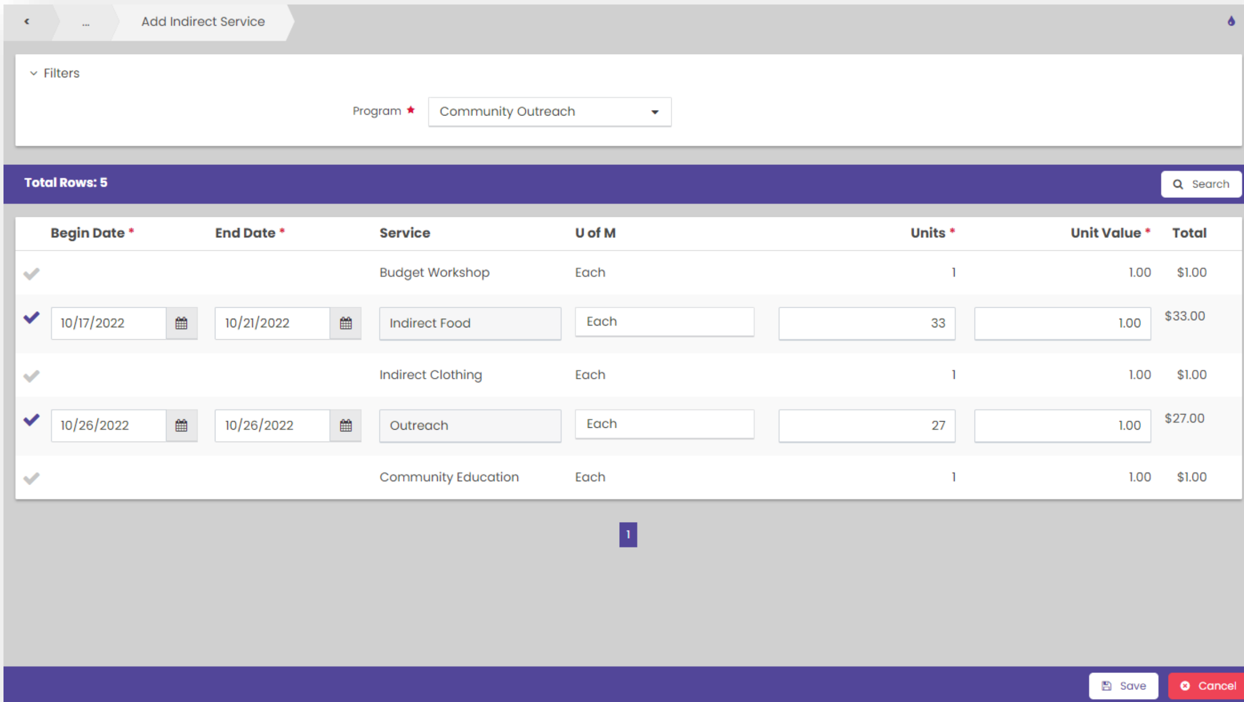
The *Indirect Service Summary* form displays records which were previously recorded.



Use ADD NEW to record newly provided Indirect Services.

Programs which have services with the 'Indirect Service' usage will display for the selection.

Multiple Indirect Services can be recorded in batch.



Select a **Service**.

Enter the **Begin** and **End** date. This may be the same date if it was a single event or a date range if it occurred over time.

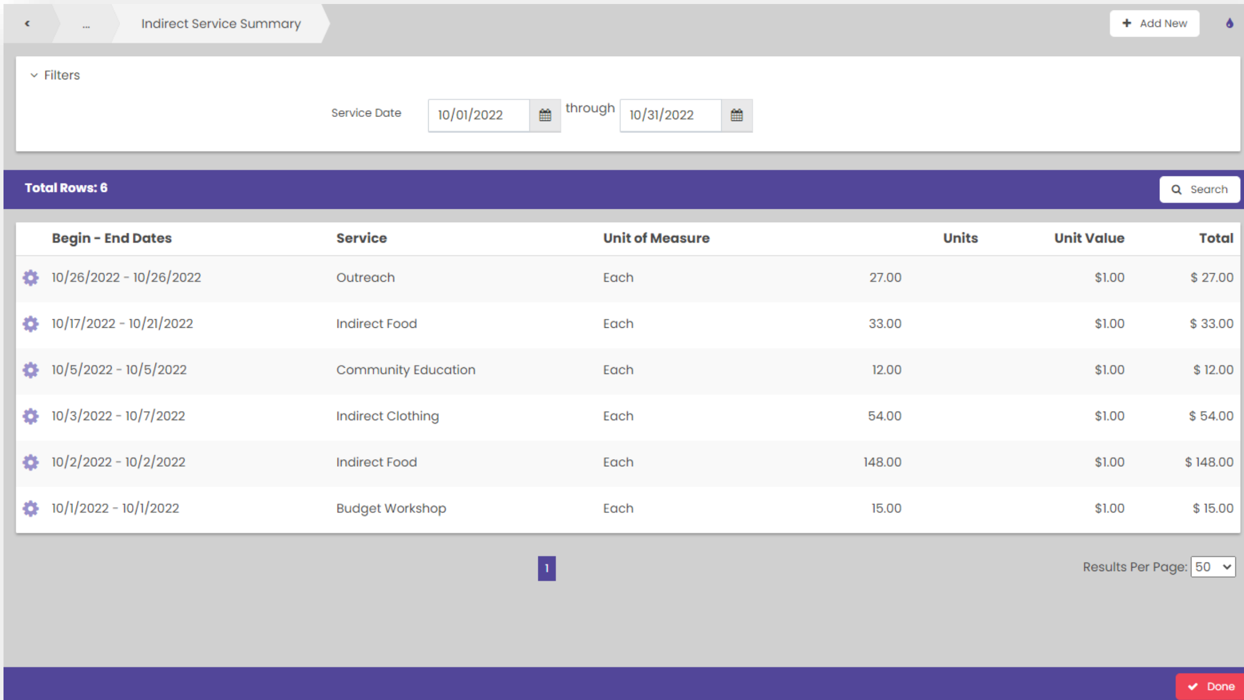
Next enter the number of **Units** that were provided.

Repeat the process for other services.

For example, record that Outreach was provided on October 26 and provided to 27 people.

When all records are entered, click SAVE.

Each record appears on the summary form.



Begin - End Dates	Service	Unit of Measure	Units	Unit Value	Total
10/26/2022 - 10/26/2022	Outreach	Each	27.00	$1.00	$ 27.00
10/17/2022 - 10/21/2022	Indirect Food	Each	33.00	$1.00	$ 33.00
10/5/2022 - 10/5/2022	Community Education	Each	12.00	$1.00	$ 12.00
10/3/2022 - 10/7/2022	Indirect Clothing	Each	54.00	$1.00	$ 54.00
10/2/2022 - 10/2/2022	Indirect Food	Each	148.00	$1.00	$ 148.00
10/1/2022 - 10/1/2022	Budget Workshop	Each	15.00	$1.00	$ 15.00

This concludes the CaseWorthy *Services* video series. Please join us for the next series, *Outcomes*.