

## How to Enter a Service Provided to a Client



1. Log-in to HIFIS. If you need assistance see the Quick Reference Guide on “How to Log Into HIFIS and Change Service Provider”.

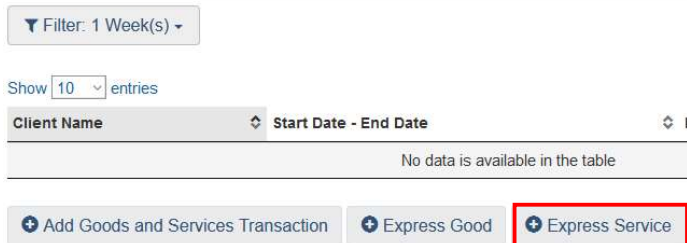
◆ **NOTE:** There are no steps 2 – 5, continue to step 6.

There are two different means by which you can enter a Good: 1) using **Front Desk** or 2) **searching the client**. Both accomplish the same result and boils down to preference; however, if using the Front Desk method, the user should know for certain which record in HIFIS represents the client. **First are the steps using Front Desk.**




6. Select **Front Desk**.
7. Select **Goods and Services**.

### Goods and Services List

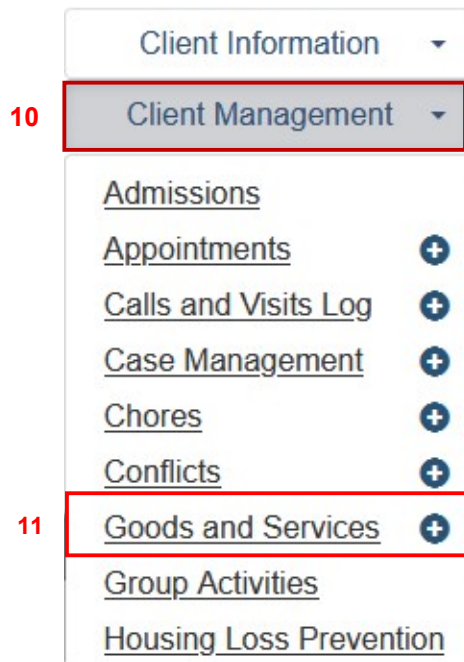


8. Click the **Express Service** button on the **Goods and Services List** screen.

Second are the steps searching the client.



9. After searching and finding the client, on the **Client List** screen select the client record that you want to add a Service to by clicking on the name of the client.



10. Select **Client Management**.  
11. Select **Goods and Services**.



12. Click the **Express Service** button on the **Client - Goods and Services** screen.

Both methods above accomplish the same results and bring you to the fields described below for completion. By using **Front Desk** you would need to search for the client in step 13 below because you have not yet identified the client; whereas by first **searching the client** you will not be presented with a Client Name field and you would start at step 14 below and complete the remaining fields.

### Add Express Services Transaction

Client Name(s) **13**  ★

Service **14**  ★

Program **15**  + - ★

Reason for Service **16**  ★

Expended Minutes **17**

Referred to **18**  ▼

Comments **19**

**20**

13. Search and select the client when Front Desk is used, otherwise continue to step 14 if searching the client was used.
14. Select a **Service** from the drop-down list.
15. Select the **Program** funding the services transaction.
- ◆ **NOTE:** If multiple values are available for Program only one value must be selected.
16. Select a **Reason for Service** from the drop-down list.
17. Optional: Enter the **Expended Minutes** it took to perform the service.
18. Optional: Select to **Referred to** from the drop-down list.
19. Optional: Enter **Comments**.
20. Select **Save** to complete the creation of the Service record.

◆ **NOTE:** By default, the effective Date is the current date and a user must edit the Goods and Services Details transaction if another date is desired. The steps below demonstrate how to change the date for a Goods and Services entry.

### Client - Goods and Services

30Days 90Days 180Days All

Show 10 entries Filter items

Service Provider	Date	Details	Action
Training Site 1	2021-02-13 - 2021-02-13	Advocacy <b>21</b>	

21. Click the edit **Goods and Services Details** icon on the **Client - Goods and Services** screen.

### Client - Edit Goods and Services

Reason for Service  ★

Program

Referred by

Referred from  ▼

Referred to  ▼

**22** Start Date and Time   ★

Case Management Activity

Number of Individuals

Comments

**23**

22. Edit the **Start Date and Time** for the Goods and Services.
23. Click **Save**.