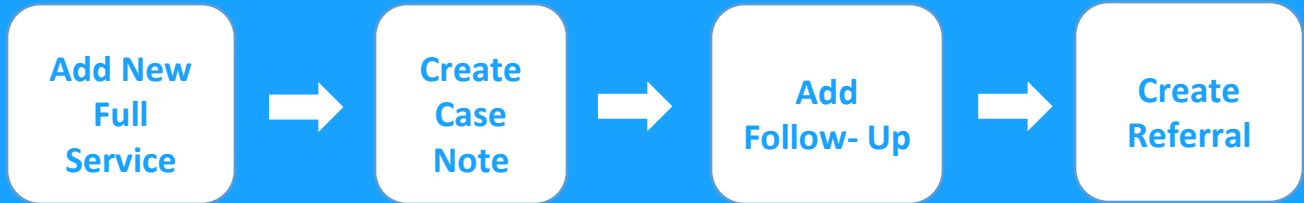


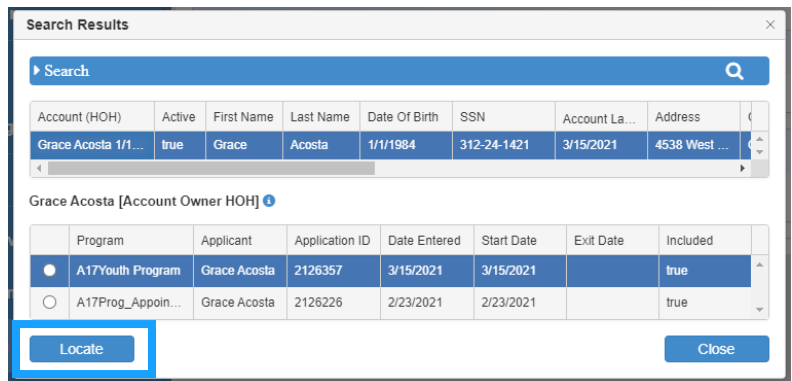
### Summary

Use the Full Service page, within Individual Services to create and establish a history of services provided. Search for client in fields at top of page. Full Services page is used to create an appointment to provide advising in Housing & Homeless, Household Income, Transportation, Wellness, Mental Health, Workforce Development, Supportive Services and Food Security.



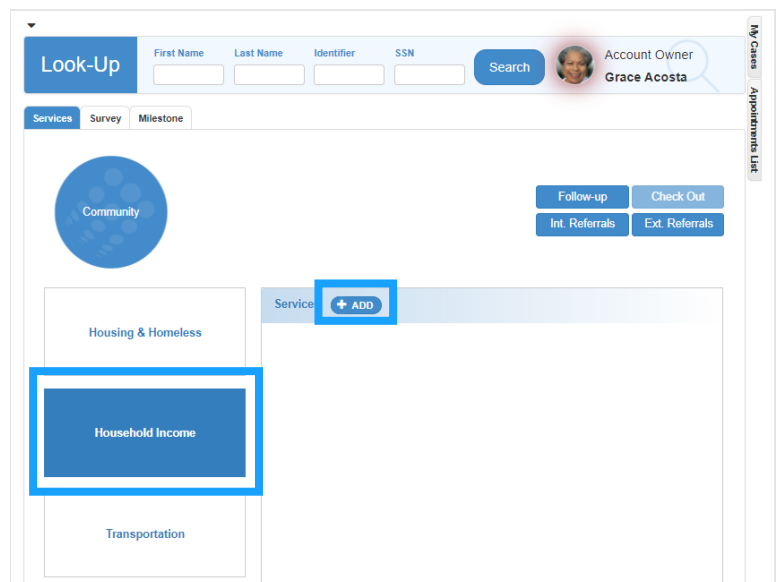
### Add New Full Service: On Full Service page

- Go to the **Full Service** page
- Locate Client in the **Look-Up** search bar
  - Enter Clients Name, Identifier or SSN
  - Click **SEARCH**
  - In Search Results popup-window:
    - Select Client Account
    - Click **LOCATE**



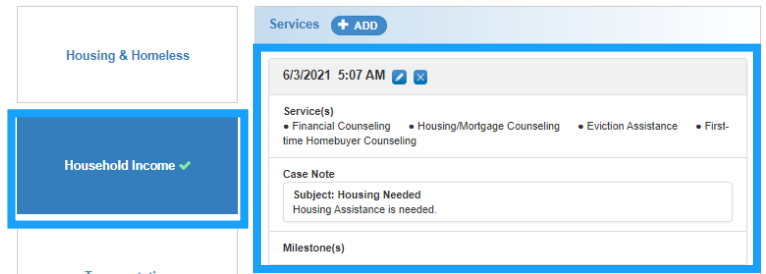
**Note: An Account must be created on the Account Summary page or in Portal for a Client to be Located.**

- On the **Services** tab, select the Service type being provided
  - The selected service will be highlighted in blue
  - Click **ADD**
- In the **Case Notes** popup window:
  - Select the Services needed by marking the checkbox
  - Enter in the Case Note information
  - Click **SAVE**



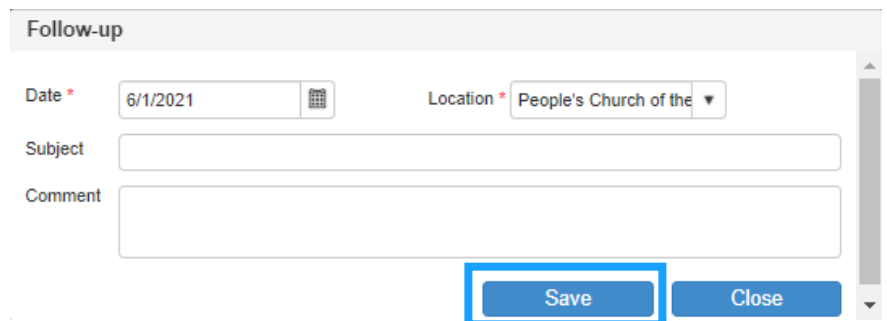
**Note: Click on the Microphone for Speak-to-Text when completing Note summary.**

- The Full Service has been created and displayed on the clients account with Case Notes
  - Click **EDIT** to edit
  - Click **DELETE** to delete



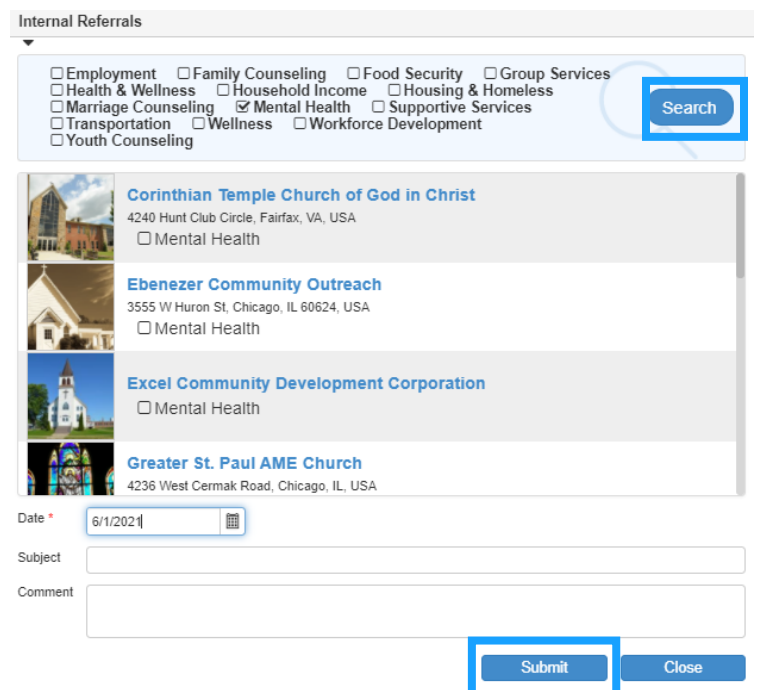
## Follow-Up:

- Click on **FOLLOW-UP** to create a follow-up appointment.
- In the Follow-Up popup window:
  - Input Date, Location, Subject and Comment
  - Click **SAVE**



## Internal Referrals:

- Click on **INT. REFERRALS** to submit an Internal Referral.
- In the Internal Referrals popup window, select the Service type being referral and click **SEARCH**
  - Select location for External Referral, as multiple locations may generate.
- Checkmark box for Internal Referral Location
  - Input Date, Subject and Comment
    - Only one referral location per day can be made
  - Click **SUBMIT**



## External Referrals:


- Click on **EXT. REFERRALS** to submit an External Referral.
- In the External Referrals popup window, select the Service type being referral and click **SEARCH**
  - Select location for External Referral, as multiple locations may generate.
- Checkmark box for External Referral Location
  - Input Date, Subject and Comment
    - Only one referral location per day can be made
  - Click **SUBMIT**

**External Referrals**


Housing  
  Education  
  Employment  
  Health  
  Nutrition  
 Transportation  
  Emergency  
  Income  
  Independent Living Program

**Search**


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Employment




**SNAP**  
 6701 Cub Run Ct, Centreville, VA, USA  
 Emergency



**South Chicago Community Service Center**  
 8650 South Commercial Avenue, Chicago, IL 60617, USA  
 Employment



**Trina Davila Community Service Center**  
 4312 West North Avenue, Chicago, IL 60639, USA  
 Employment    Emergency

Date \*  

Subject

Comment