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| **Summary:** Use Add/Edit Services or Quick Services page to quickly record Activities and Services for your Client |  |
| **Start**: **Create Services record:** * Click **New**
* Select Date and Staff; Location and Comments are optional
* Click **SAVE**
* Select the Program component tab in the bottom section

The first time you create a record for the client, you will need to check the Program Component to use and click SAVE; afterward, the Component will be displayed on its own tab |  |
| **Next**: **on the Component tab:** * Check all Services to be logged for the client
* Update Number of Units if needed
* Select the Milestone in the dropdown
* Check Milestone Completed if true
* Click **SAVE**
 |  |
| **Optional**: **Set the Component tabs:** * Click Selected Tabs tab
* Check or uncheck to indicate which Components will be used
* Click **SAVE**

Unchecked tabs will not be displayed This can be changed as needed |  |