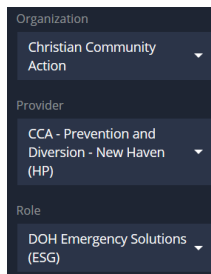## A). How to enroll a client into a program with a financial service account (6.2)

1. Make sure your provider and role are set correctly under your username in the top right
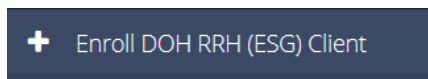

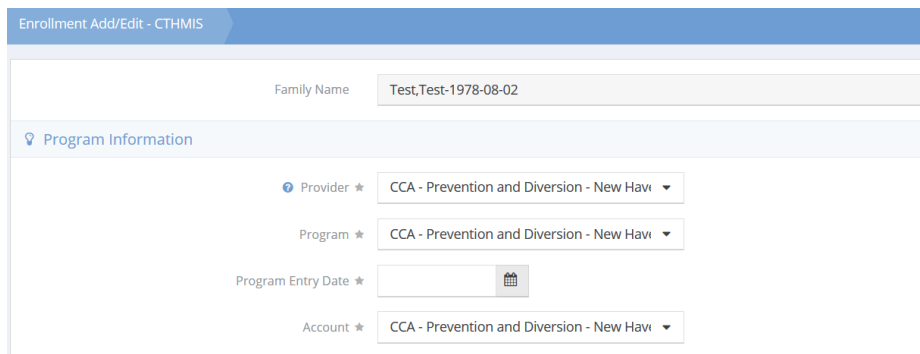2. Once you have set your provider and role, click on 'Enroll DOH RRH (ESG)' Client from the left side menu

3. Follow the enrollment workflow. Once you get to the program enrollment screen make sure to select the correct program and financial services account from the drop down menus
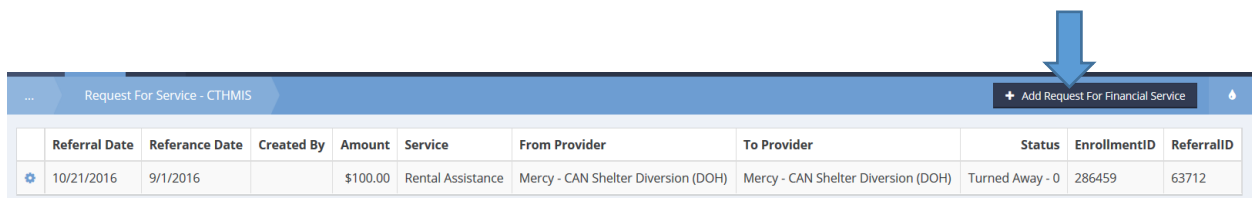

4. After selecting the program and account, follow the workflow and complete the enrollment

B). How to Create and Approve a Financial Services Request (6.2)

1. Make sure your Provider and Role are set correctly. The Financial Service Request option is only available for the DOH Emergency Solution Role and the SSVF Role.
2. Make sure your client has an OPEN enrollment. You will not be able to create a financial service request on an exited client
3. Find the client you need to create a financial service request for and then click on Case Management on the left side menu and select 'Service Request' from the list
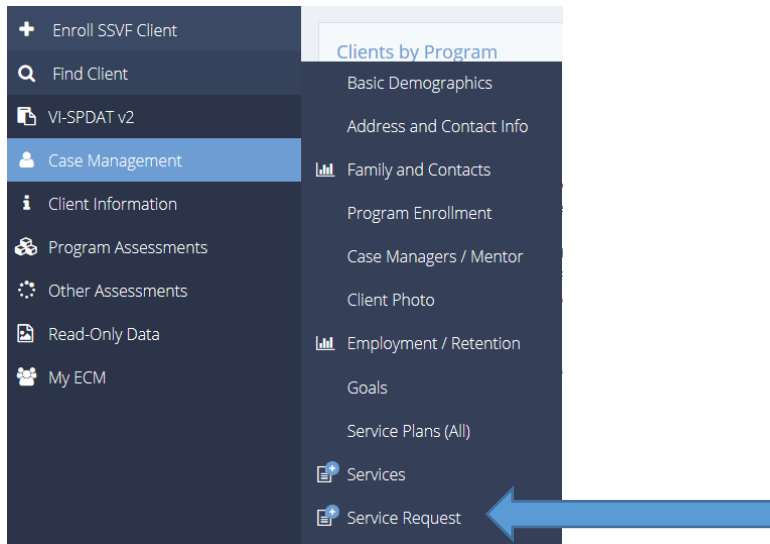
4. Any existing servicer requests will be listed here. If there are no service requests this screen will be blank.
5. To create a new service, select 'Add Request' in the top right.

	Referral Date	Referance Date	Created By	Amount	Service	From Provider	To Provider	Status	EnrollmentID	ReferralID
⚙	10/21/2016	9/1/2016		$100.00	Rental Assistance	Mercy - CAN Shelter Diversion (DOH)	Mercy - CAN Shelter Diversion (DOH)	Turned Away - 0	286459	63712

6. Complete the fields in the 'Requesting Service Form', 'Payment To' and 'Request Information'
7. Make sure to check your dates b/c they will default to today's date
8. Select the enrollment from the list, the account will auto-populate after you select the program
9. Select the financial service from the list

♀ Account Balance and Service Remaining Summary

	Units	Unit Value	Service Total
Service Remaining			
Account Balance			

♀ Requesting Service From

Enrollment ★ [CCA - Prevention and Diversion - N ▾]   Account [CCA - Prevention and Diversion - N ▾]

Service ★ [▾]

Transaction ★ Date [07/20/2017 📅]

Refer From ★ Provider [CCA - Prevention and Diversion - New ▾]

10. Next, select the payee. The payee lookup will give access to payees who already exist in HMIS.

11. If you can't find the payee then you can simply add them.

12. Complete the Request section. Make sure to enter the dollar amount. It defaults to 1

13. Once you complete the form you can hit save in the bottom right.
14. Your request will show in the Service Request view.

15. Your service request will be visible to whomever has been given person to approve the request. Your request will show as 'pending' status until the approver either approves or denies the request
16. A financial service cannot be edited. If you accidentally create and save a financial service request you will need to contact the person authorized to approve it. The request will need to be denied and then a new request can be created.

17. If an incorrect financial service request is APPROVED then a new request needs to be made for a negative dollar amount. If you approve an incorrect request for $600 then an new request needs to be created and approved for -$600.

C). Approving a Financial Service Request:

1. If you are set up to approve a financial service you need to make sure you set your role to 'Service Request Approval'
2. Click on Find Organization and search for your organization. Click on your organization in the search window
3. Once you find your organization, click on 'Service Requests'
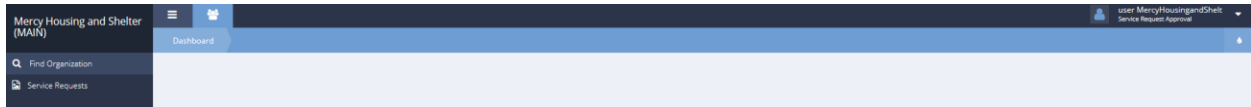
4. Then click on 'Service Request Approvals'
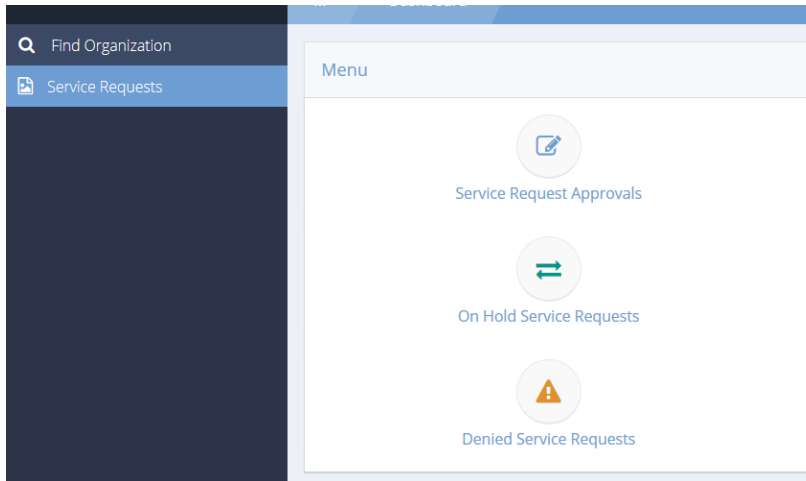
5. Click on the 'Step' option and select the account you will be approving for
6. Also select the status option to view pending approval or any other approvals that you would like to view – LEAVE REFERAL TYP BLANK
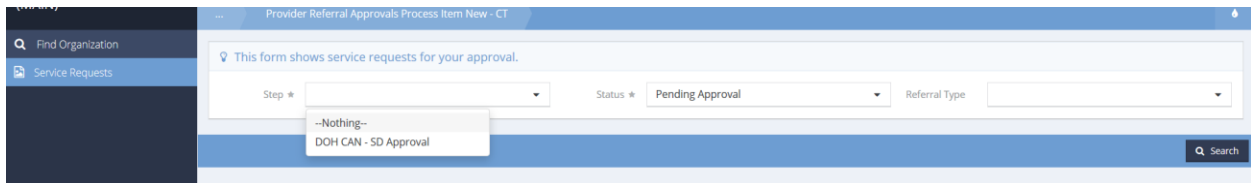
7. From Pending Approvals, select 'Search', this will bring up the list of all requests that are in pending status waiting for your approval

8. Click the check box next to the request, this will open the request and allow you to approve or deny the request. You will not be able to edit the request.

9. Once you approve or deny then click save. The request will be updated in the client record and the outcome will be visible to the case manager.