Maintaining Service Types (by Placement Type)

Purpose

Through the process outlined below, you will learn how to maintain a group of Service Types by their associated Placement Type. This allows you to quickly update several core elements for a number of like Service Types for your county. For example, you may wish to update your Reporting Category for all of your county's Foster Care Service Types. By maintaining Service Types by Placement Type, you can easily go in and make a single update that will be copied to all Service Types associated with that Placement Type. Setting up core setups for each Placement Type also ensures that any new Service Types that are created will inherit the core characteristics of their like Service Type partners.

Maintaining a Service Type by Placement Type

1. Select Financial > Maintain by Placement Type

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2. From the Maintain by Placement Type page, select the Placement Type that you wish to work with. For our example here, we will be working with the Foster Home Placement Type.

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3. Notice that each Placement Type has a "core setup." This core setup was created as a conversion effort with this change being introduced. The conversion took the most common setup across all Service Types for a given Placement Type, but should be viewed for accuracy.

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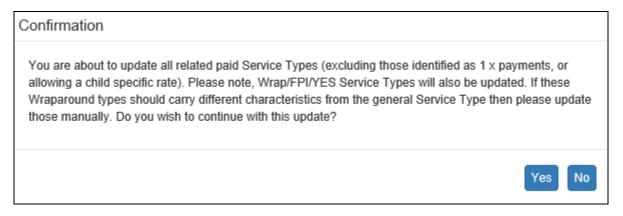
4. There are two ways to create a new core setup for a given Placement Type. The first option is to select the Insert button.

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5. In the Service Information by Placement group box, update the Recurring Payment group box by selecting either the Yes or No radio button for each item, the Reporting Category, and identify the SPC Code.

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6. Click Save. You will receive the following message:



Pay close attention to the fact that the update you are about to commit will not affect one-time payments or Service Types that use a child specific rate. Also note, that Wrap/FPI/YES versions of Service Types will be

updated, so if your county handles these types of payments separate from the regular version of the Service Type then you will need to individually update those, setting them back to their desired setup.

7. The second option to create a new core setup for a given Placement Type is to select the <u>Copy</u> hyperlink next to the core setup you wish to build off.

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8. Clicking the Copy button will insert a duplicate row. Each data element is a direct copy of the setup that it was copied from, and each element is enabled for editing. Make the necessary changes and Save the page.

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Viewing the Updates to Placement Type

Once updates have been made to Service Types via the Maintain by Placement Type page, you can view all components of the Service Type via the Maintain Service Type and Rate page.

To access the Maintain Service Type and Rate page, select Financial > Maintain Service Type and Rate.

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