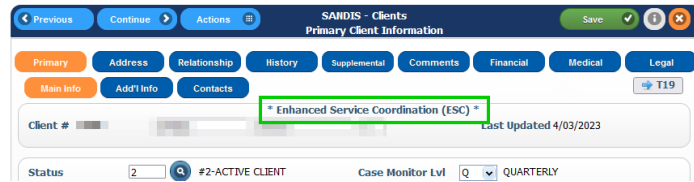


Service Delivery Type Tracking

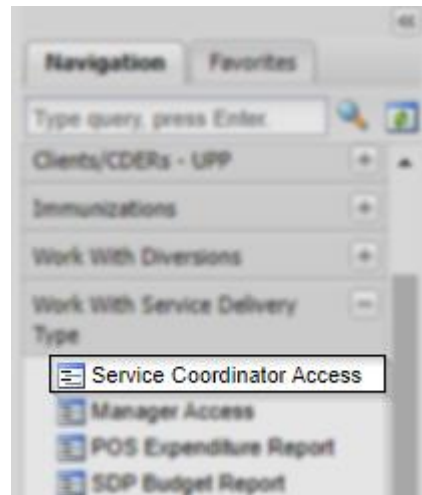
Clients enrolled in **Self Determination Program (SDP)** and/or **Enhanced Service Coordination (ESC)** will now display a message at the top of the primary screen in SANDIS.





Work with Service Delivery Type


A new program is available for Service Coordinators that displays a high-level view of clients' Service Delivery Information.

To find this new feature, use the navigation menu on the left side of the screen to find a category called **Work With Service Delivery**. Click the **+** icon and select **Service Coordinator Access**.



All clients enrolled in SDP will be displayed in a grid and will contain the client’s enrollment status, service delivery type, date enrolled and the reason for enrollment. This displayed list will default to all clients within the Service Coordinator’s caseload.

A user can also view the clients of other caseloads within their unit or any other units that they may have access to. Type in the desired caseload code next to **Service Coordinator** and click  or click the  icon to view a listing of Service Coordinator names and caseload codes.



The screenshot shows the SANDIS application interface. At the top, it says "SANDIS Work With Service Delivery Type" and "Showing only Clients with Service Delivery Type Activity". Below this is a search bar for "Service Coordinator" and a "Date Range" selector. There are three radio buttons: "Show All Clients", "Show only Enrolled (S/T)" (which is selected), and "Show Only UC#s with RO data". Below the radio buttons is a table with the following columns: Srv. Cde, UC#, Last Name, First Name, Date of Birth, Status, ESC, Svc. Delv. Type, Date, and Reason. The table contains several rows of data, all with a status of "#2-ACTIVE CLIENT" and a reason of "Initial Enrollment". At the bottom left of the table area, there is a button labeled "Export to Excel".

Srv. Cde	UC#	Last Name	First Name	Date of Birth	Status	ESC	Svc. Delv. Type	Date	Reason
					#2-ACTIVE CLIENT	N	Self-Determined	09/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	07/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	09/01/2020	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	03/01/2021	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	04/01/2023	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	03/01/2021	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	07/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	11/01/2021	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	10/01/2021	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	12/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	08/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	11/01/2021	Initial Enrollment

By default, clients that are enrolled in SDP will be displayed in the grid.

To show all clients within a caseload, regardless of SDP Status, click on the **Show All Clients** option. The program provides the option to toggle back and forth between both options.

Prv Cnt	UCIP	Last Name	First Name	Date of Birth	Status	ESC	Svc Divr Type	Date	Reason
					#2-ACTIVE CLIENT	N	Self-Determined	09/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	07/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	09/01/2020	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	03/01/2021	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	03/01/2021	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	04/01/2023	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	07/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	11/01/2021	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	10/01/2021	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	12/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	08/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	11/01/2021	Initial Enrollment

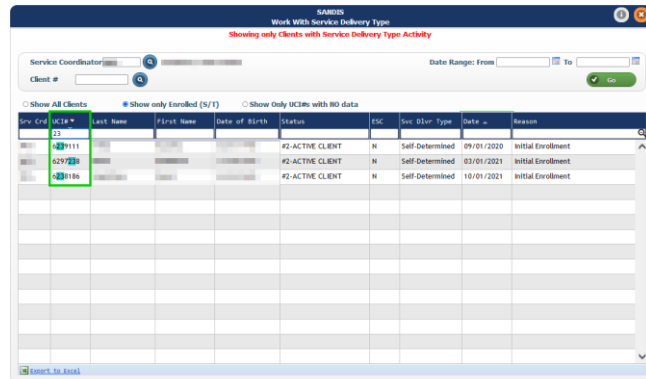
The list can be further sorted and filtered.


Click on any of the blue headers to toggle between ascending and descending order.

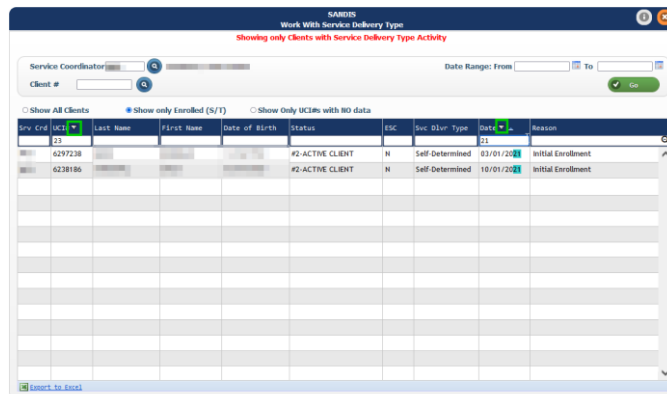
Prv Cnt	UCIP	Last Name	First Name	Date of Birth	Status	ESC	Svc Divr Type	Date	Reason
					#2-ACTIVE CLIENT	N	Self-Determined	09/01/2020	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	03/01/2021	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	03/01/2021	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	10/01/2021	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	11/01/2021	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	11/01/2021	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	07/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	07/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	08/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	09/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	12/01/2022	Initial Enrollment
					#2-ACTIVE CLIENT	N	Self-Determined	04/01/2023	Initial Enrollment



Beneath the blue header is a text box that can be used to filter the results dynamically.

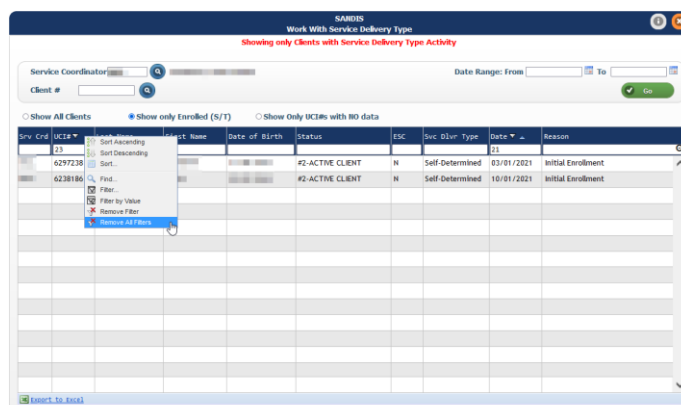
For example, typing '23' in the **UCI#** field will identify any time that value is matched, while simultaneously removing entries that do not match.



Multiple filters can be used at the same time. Type within multiple text fields to fine-tune your search results. Once a filter is active, an  icon will be displayed next to the name of the blue header.



To hide the Filter text box, click on the  icon. Any filters that were used will be left activated and can be viewed by the  icon. To stop using all filters, right-click anywhere on the blue headers and select **Remove All Filters**.



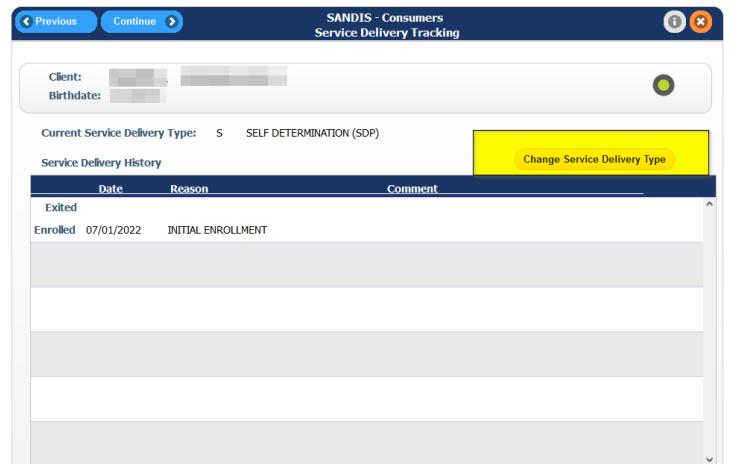
Similar to other SANDIS programs, this list can be exported to Excel and downloaded to a desktop by clicking the Export to Excel button.



Select a client by double-clicking on their record or by right-clicking and choosing the **Select** option.



Doing so will take you to the client's **Service Delivery Tracking** record. The Service Delivery Type can be changed* by clicking the **Change Service Delivery Type** button.



Press **Previous** to return back to the previous window.

*: Not all users are able to Change Service Delivery Type