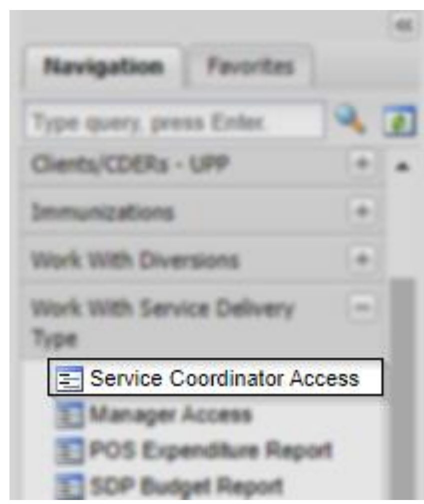
Service Delivery Type Tracking

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

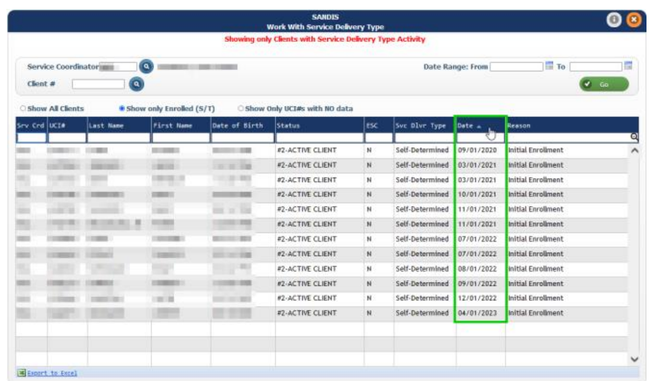
A new program is available for Service Coordinators that displays a high-level view of clients' Service Delivery Information.

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**.



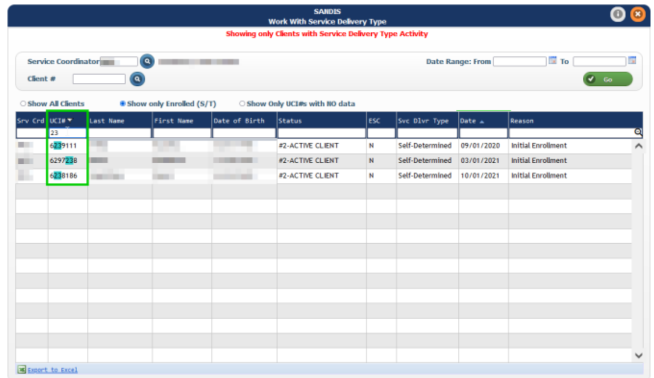
All clients enrolled in SDP will be displayed in a grid and will contain the client's enrollment status, service delivery type, date enrolled and the reason for enrollment. This displayed list will default to all clients within the Service Coordinator's caseload.

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 Go or click the icon to view a listing of Service Coordinator names and caseload codes.

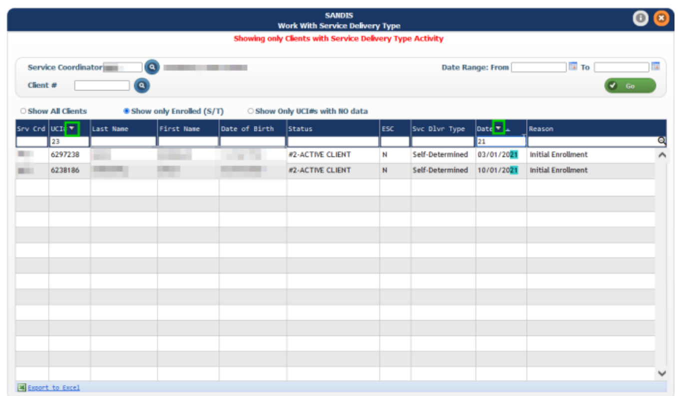
By default, clients that are enrolled in SDP will be displayed in the grid. To show all clients within a caseload, regardless of SDP Status, click on the **Show All Clients** option. The program provides the option to toggle back and forth between both options.	
The list can be further sorted and filtered. Click on any of the blue headers to toggle between ascending and descending order.	

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

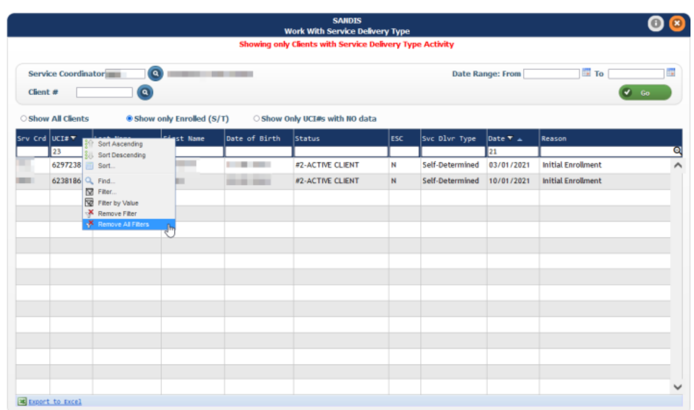
For example, typing ‘23’ in the **UCI#** field will identify any time that value is matched, while simultaneously removing entries that do not match.



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