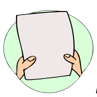
Service Arrangement Required Fields

Service Arrangement Introduction

Service Arrangements define purchased services – the details of the service, along with the limits for those services, and the financial information for making a payment. A Service Arrangement can be for a specific client with a specific vendor or can be for a specific vendor and no specific client. Most Service Arrangements are client specific. Generally, non-client specific Service Arrangements define the terms of a contract with a vendor. Depending on the terms, client information may or may not be included on the payments with a non-client specific Service Arrangement.

Before a client receives a service, an agency staff person arranges the details, such as locating a vendor, negotiating rates and the number of units to be provided. The social worker creates a Service Arrangement to record these details. Then the Service Arrangement goes through the service and payment approval process. Once the Service arrangement is approved it can be used as a template for a Payment.



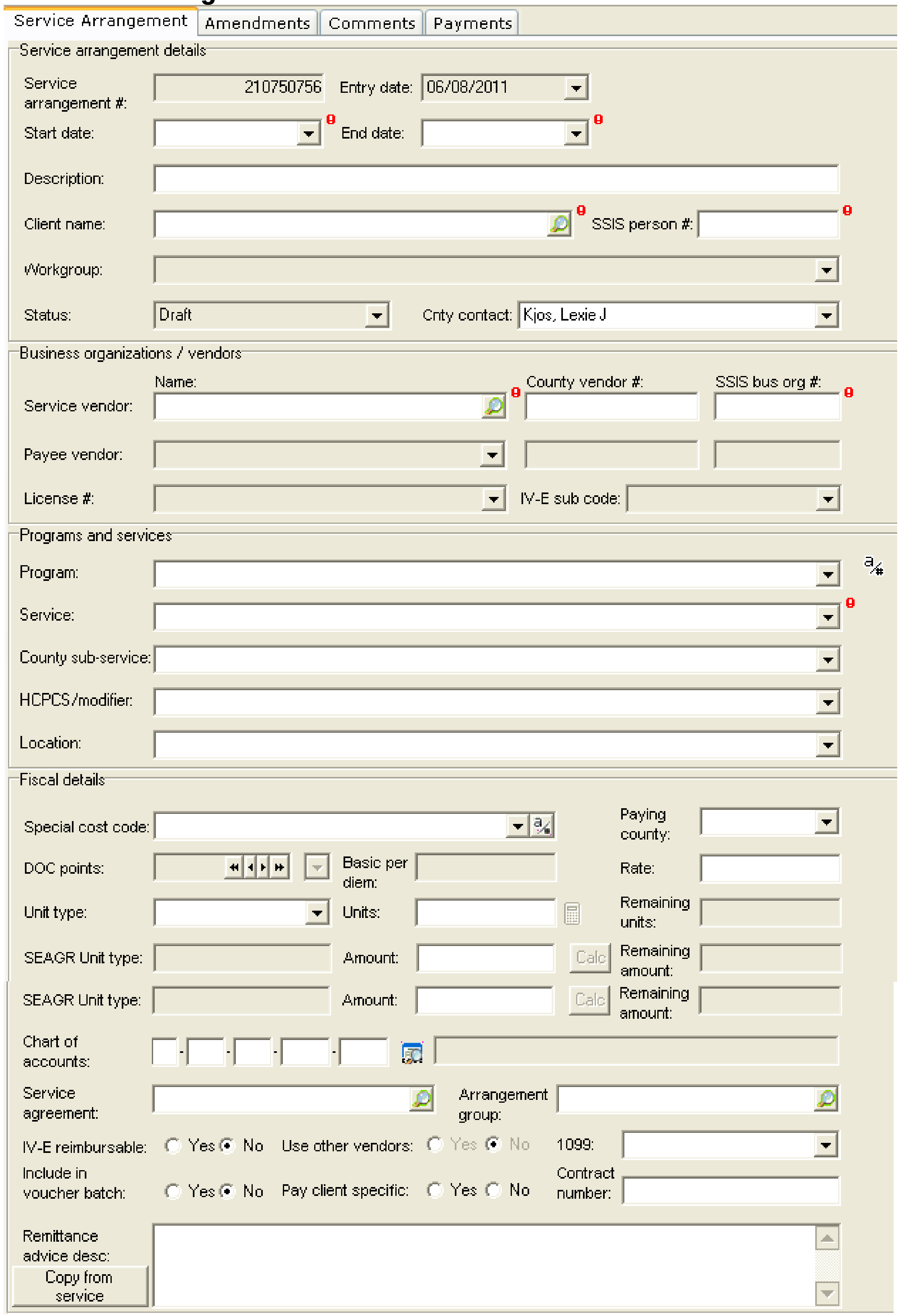
Reference: Refer to Service Arrangement flow chart for a complete diagram of the Service Arrangement life cycle.

Prior to making payments for a Service Arrangement, any field can be changed, but the change may require re-approval. The user must have the security to create a Service Arrangement of the same type (client specific or non-client specific).

Some fields can be changed even after payments are made without requiring re-approval. Users with security to edit the Service Arrangement and users with the security function Edit Service Arrangement Reporting Fields can change these fields.

The exception is Service Arrangements with a Canceled status, which cannot be changed.

Service Arrangement Screen



What's Editable When

Service Arrangement Status							
Canceled (Discarded)	Denied	Draft	Pending Service Approval	Pending Accounting Approval	Approved For Payment	Active (Payments Made)	Inactive
No changes allowed	No changes allowed	Any field *see note	Any field *see note	Any field Changes may require re-approval *see note	Any field Changes may require re-approval– *see note	See field list on page 5	See field list on page 5

Table 8-5: Editing Service Arrangements – Service Arrangement Design Spec.
**Note - Except system generated fields*

System Generated Fields

The following fields are system generated and non-editable, with the exception of County Contact.

Client Specific Service Arrangement	Non-Client Specific Service Arrangement
Service Arrangement #	Service Arrangement #
Entry Date	Entry Date
Status	Status
County Contact	County Contact

New Service Arrangement – Draft Status

To save a new Service Arrangement, the following fields must be completed. Once these fields are completed the Service Arrangement can be saved until further information is available.

Client Specific Service Arrangement	Non-Client Specific Service Arrangement
Client Name	Vendor Name
SSIS Person #	County Vendor #
	SSIS Business Organization #
Hint: If a client is selected, the SSIS Person # autofills and vice versa.	*Hint: If the vendor is found using the Business Organization search button, the County Vendor # and SSIS Business Organization # fields autofill.*
Service	Service
Start Date	Start Date
End Date	End Date
Program	Service
Service	

Service Approval

Before you send the Service Arrangement for Service Approval, the following fields must be completed. Once these fields are completed the Service Arrangement can be sent for Service Approval and Service Approval can be authorized with no additional information needed.

Client Specific Service Arrangement	Non-Client Specific Service Arrangement
Unit, Rate or Amount/ at least one is required.	Unit, Rate or Amount/ at least one is required.
Unit Type	Unit Type
Use Other Vendors.	Indicate if this Service Arrangement is to be paid Client Specific.

Hints:

- *If a Special Cost Code is selected the Unit, Rate, Amount or Unit Type fields may or may not be required. If they are not required, these fields are disabled.*
- *The Remaining Units field and the Remaining Amount field are system generated. These fields do not display any information until payments have been associated with the Service Arrangement.*

Hint: The remaining fields are fiscal related.

Reference: Refer to your supervisor or mentor for your agency's workflow for completing these fields, e.g., some agencies may require their social workers to select a Chart of Account code.

Approved for Service Approval – Approved for Payment

After the Service Approval has been given the Service Arrangement is ready for Accounting Approval. The following fields must be completed before Accounting Approval is given.

Client Specific Service Arrangement	Non-Client Specific Service Arrangement
Chart of Accounts	Chart of Accounts
IV-E Reimbursable	IV-E Reimbursable
Paying County (if visible)	Paying County (if visible)

Hints:

- *These fields can be completed at any time prior to this step if the information is known.*
- *These fields can be changed at any point prior to Approved for Payment status.*
- *A payment can be created from a Service Arrangement once the status of that Service Arrangement is "Approved for Payment."*

Active / Payments

Once Payments have been made, the following fields can be changed without additional approval:

Client Specific Service Arrangement	Non-Client Specific Service Arrangement
Start date	Start date
End date	End date
Description	Description
Workgroup	Workgroup
County contact	County contact
License #	License #
IV-E Sub-code	IV-E Sub-code
Service agreement	Service agreement
Arrangement group	Arrangement group
1099	1099
IV-E Reimbursable	IV-E Reimbursable
Include in voucher batch	Include in voucher batch
Contract number	Contract number
Remittance advice desc.	Remittance advice desc.

Hint: If other fields need to be changed, you will need to create an Amendment or create a new Service Arrangement.