

## Adding Units – Client Level Data

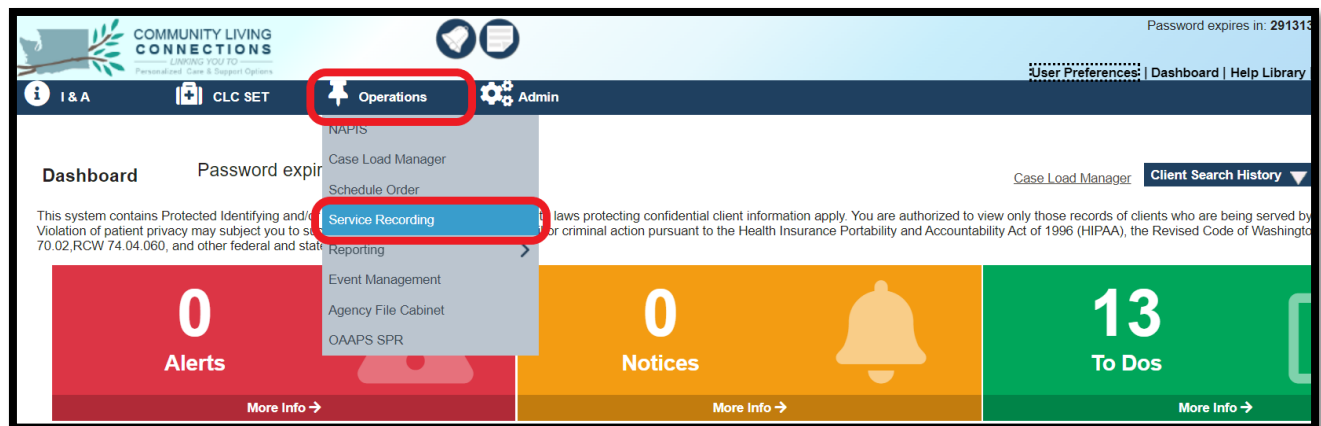
This is a general guide that shows how to record units using both Service Recording and Progress Notes for services where data is entered at the client level in GetCare. First, service enrollments need to be created for the client before units can be recorded. Please refer to the “Service Enrollment GetCare Guide” for information on how to create a service enrollment. Units can be recorded in two different ways, Service Recording and Progress Notes. Both are totally fine to use, and it is up to the agency/person to decide which way works best for them.

Please refer to the service area [Data Specifications on the Aging and King County website](#) for more information about which services are client level services, additional data requirements, and details in GetCare.

## Adding Units Using Service Recording

Units can be entered for multiple clients that are enrolled in a service when you use Service Recording. Units will be entered as totals for the month.

### 1. Hover over the “Operations” tab and click on “Service Recording.”



### 2. Enter in the information for the month and service you want to record units for, then hit “Apply.”

- Month and Year - change this to the month and year you are recording units for.
- The Region and Provider should auto-populate.
- Select the Scope of Work you wish to add units for.
- If applicable, select the Program, Site, and Service Detail.
- If you need to change any of your selections, click “reset” next to one of the fields.
- Hit “Apply.”

### 3. Enter the number of units next to the client's name, in the column under "Monthly Quantity." When finished, click "Save."

The clients that are listed are ones who have an active Service Enrollment created in their client file. If a client is missing from the list, open their client file and check to see if a service enrollment was created and the dates are correct for that service under the "Service Enrollments" section.

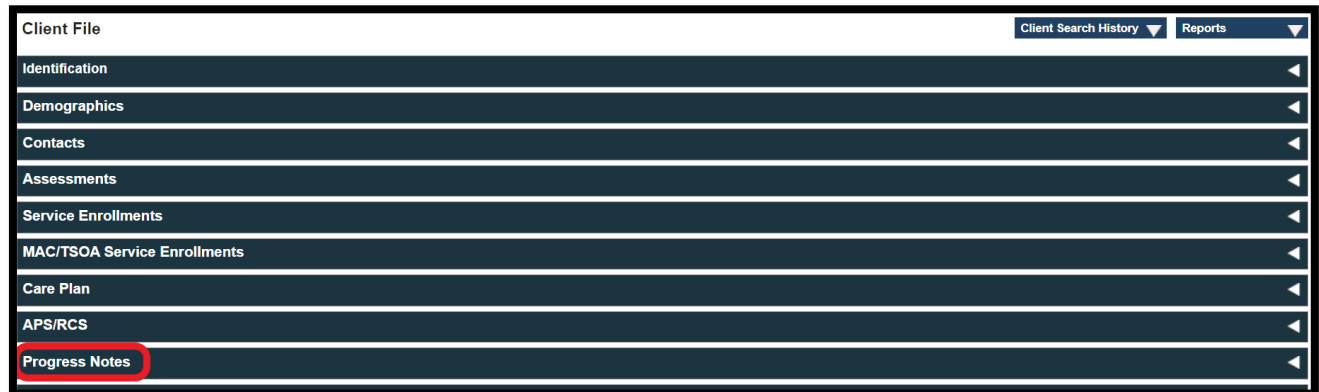
Program/Service Detail/Site	GC ID	DOB	Client Name	Monthly Quantity	Recording Quantity	Authorized Qty	Enrollment Date	Updated By	Update Date
OAA TIIIB/SCSA/TXIXMAC/ARPA/LOC/1 - Community Assistance Contact	553367	10/11/1964	[Client Name]	1.00	.00	0.00	10/01/2021 - 12/31/9999	[User]	02/07/2024
OAA TIIIB/SCSA/TXIXMAC/ARPA/LOC/1 - Community Assistance Contact	753631	02/22/1980	[Client Name]	8.00	.00	0.00	10/01/2021 - 12/31/9999	[User]	02/07/2024
OAA TIIIB/SCSA/TXIXMAC/ARPA/LOC/1 - Community Assistance Contact	537242	03/08/1957	[Client Name]		.00	0.00	10/01/2021 - 12/31/9999		

### 4. If you are entering units for multiple services, you can repeat these steps but change the fields above and click "Apply."

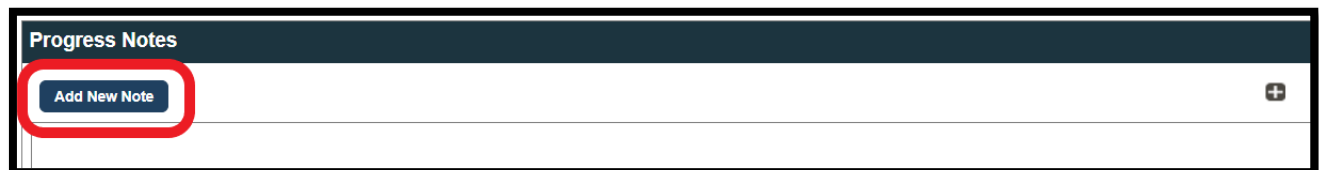
## Adding Units Using Progress Notes

Adding units using progress notes allows you to record more details about the service provided or include case notes. Units can be added as a total for the month, or as they occur throughout the month.

### 1. Open the client file and click on “Progress Notes.”

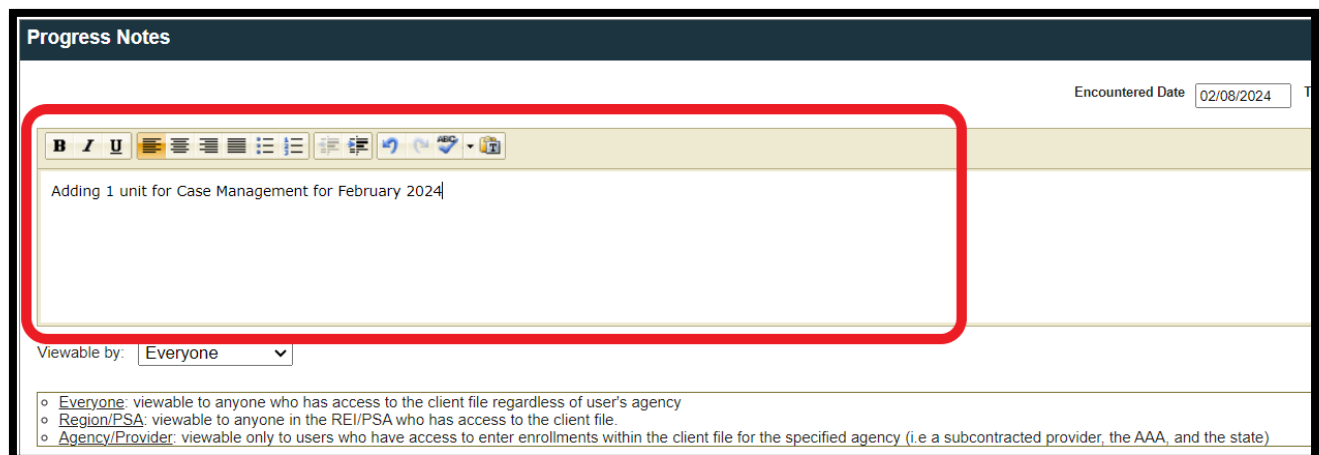


### 2. Click on “Add New Note” in the top left corner of the section.



### 3. Enter the name of the service, number of units, month, and year you are recording units for.

This is where case notes or additional details can be entered.



## 4. Fill out the fields in the “Select Element” portion.

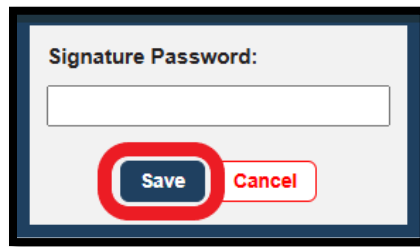
- Select Element: Units
  - Unit Date: date you provided the service, or if entering a monthly total, select any day of the month units are being added for
  - Service enrollment: Select the service you are recording units for
  - Units: number of units
- Check the “Service Detail” to see the definition of the unit for the service.

The screenshot shows the 'Progress Notes' form. At the top right, 'Encountered Date' is 02/08/2024 and 'Time' is 04:38 PM. Below the text area (which contains 'Adding 1 unit for Case Management for February 2024'), there is a 'Viewable by:' dropdown set to 'Everyone'. Below this is a list of three radio button options: 'Everyone', 'Region/PSA', and 'Agency/Provider'. The 'Select Element' portion, highlighted with a red box, includes a dropdown menu set to 'Units', a 'Unit Date' field with 02/08/2024, a 'Units' field with 1, and a 'Service Enrollment' dropdown menu with the text 'Deaf-Blind Service Center : Case Management - OAA TIIIB/ARPA/SCSA/LOC - 1 Hour - No Site Assigned'. At the bottom left of the red box is an 'Add Additional Element' button.

## 5. When finished, click “Save and Sign.”

The screenshot shows the 'Progress Notes' form with updated dates: 'Encountered Date' is 09/05/2025, 'Time' is 04:17 PM, and 'Entered Date' is 09/05/2025. The 'Viewable by:' dropdown is still 'Everyone'. The 'Select Element' portion is the same as in the previous screenshot. At the bottom right, there are four buttons: 'Save', 'Save as Draft', 'Save and Sign' (highlighted with a red box), and 'Cancel'.

6. Enter your “Signature Password” to save and submit the Progress Note.

A screenshot of a software dialog box titled "Signature Password:". It features a text input field for the password. Below the field are two buttons: "Save" (a dark blue button with white text) and "Cancel" (a light red button with dark red text). A red rounded rectangle highlights the "Save" button.

Signature Password:

Save Cancel