# 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."**
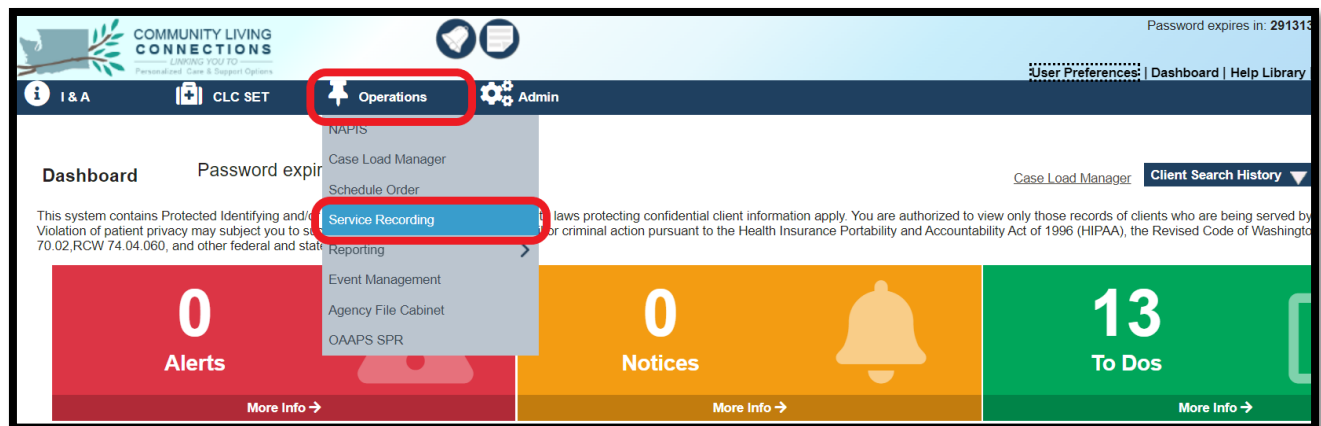
2. **Enter in the information for the month and service you want to record units for, then hit "Apply."**
   a. Month and Year - change this to the month and year you are recording units for.
   b. The Region and Provider should auto-populate.
   c. Select the Scope of Work you wish to add units for.
   d. If applicable, select the Program, Site, and Service Detail.
   e. If you need to change any of your selections, click "reset" next to one of the fields.
   f. 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.
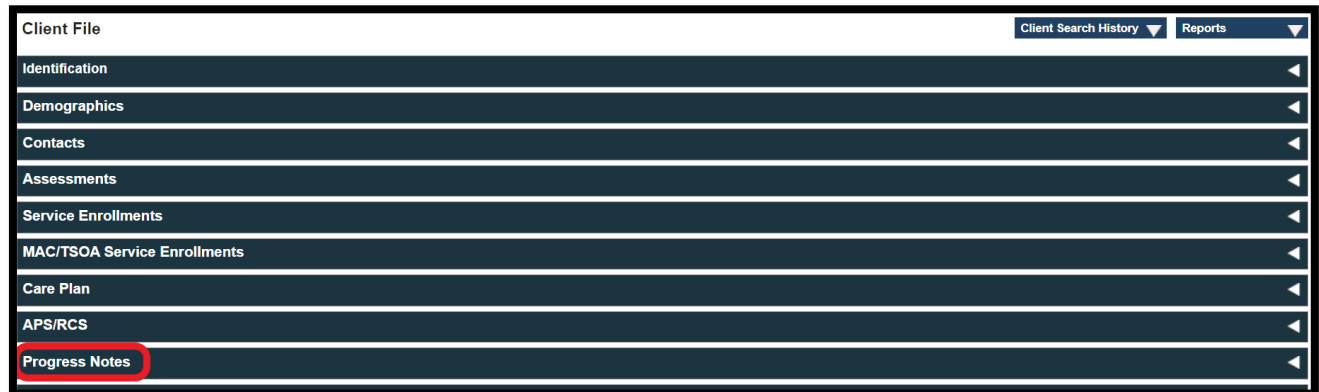

4. **If you are entering units for multiple services, you can repeat these steps but change the fields above and click "Apply."**

GetCare Guide

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.
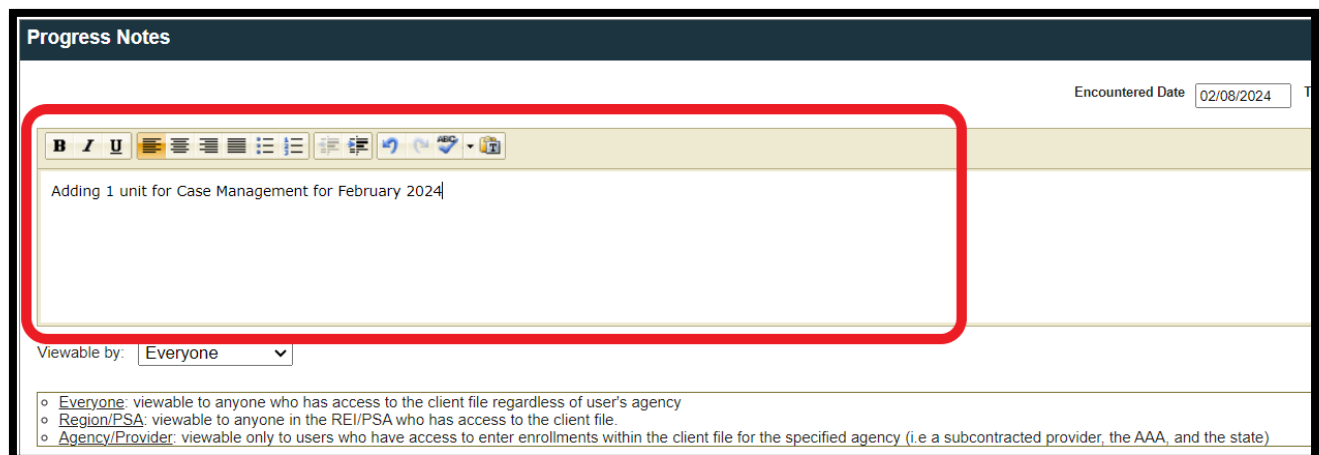
1. **Open the client file and click on "Progress Notes."**

Client File	Client Search History ▼	Reports ▼
Identification		◄
Demographics		◄
Contacts		◄
Assessments		◄
Service Enrollments		◄
MAC/TSOA Service Enrollments		◄
Care Plan		◄
APS/RCS		◄
Progress Notes		◄

2. **Click on "Add New Note" in the top left corner of the section.**

Progress Notes

Add New Note ⊕
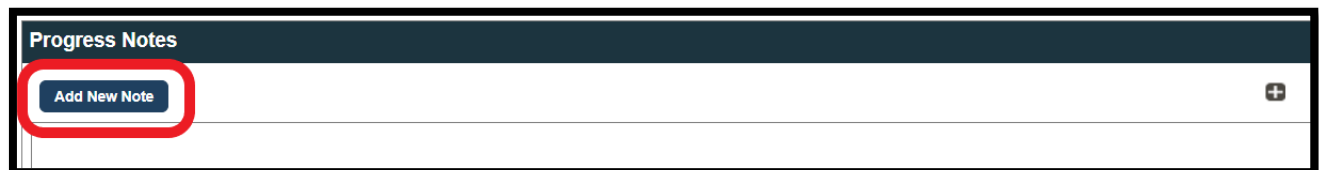
3. **Enter the name of the service, number of units, month, and year you are recording units for.**
   This is where case notes or additional details can be entered.

Progress Notes

Encountered Date 02/08/2024

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Adding 1 unit for Case Management for February 2024

Viewable by: Everyone

- Everyone: viewable to anyone who has access to the client file regardless of user's agency
- Region/PSA: viewable to anyone in the REI/PSA who has access to the client file.
- Agency/Provider: viewable only to users who have access to enter enrollments within the client file for the specified agency (i.e a subcontracted provider, the AAA, and the state)

4. Fill out the fields in the "Select Element" portion.
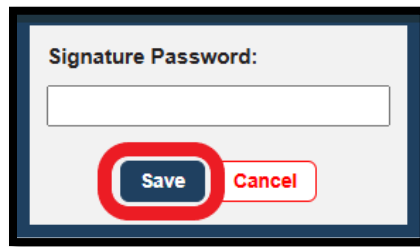
    a. Select Element: Units

    b. Unit Date: date you provided the service, or if entering a monthly total, select any day of the month units are being added for

    c. Service enrollment: Select the service you are recording units for

    d. Units: number of units

        -Check the "Service Detail" to see the definition of the unit for the service.

5. When finished, click "Save and Sign."

6. **Enter your "Signature Password" to save and submit the Progress Note.**