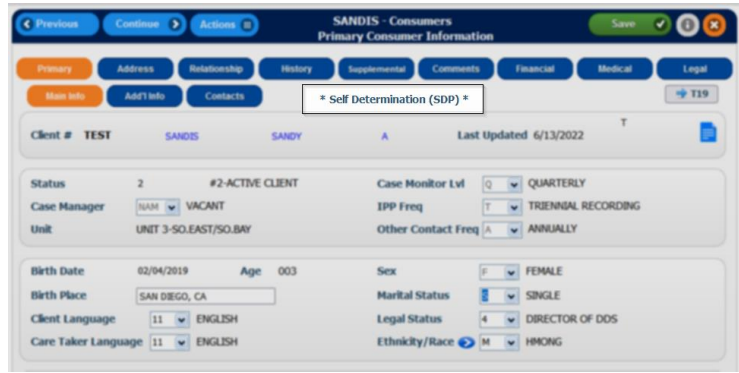



Service Delivery Type Tracking

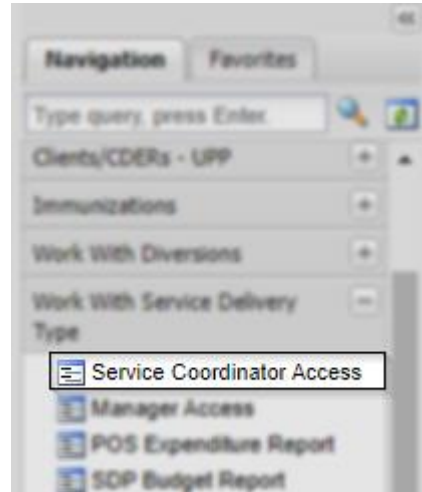
Clients enrolled in **Self Determination Program (SDP)** will now display a message at the top of the primary screen in SANDIS.




Work with Service Delivery Type

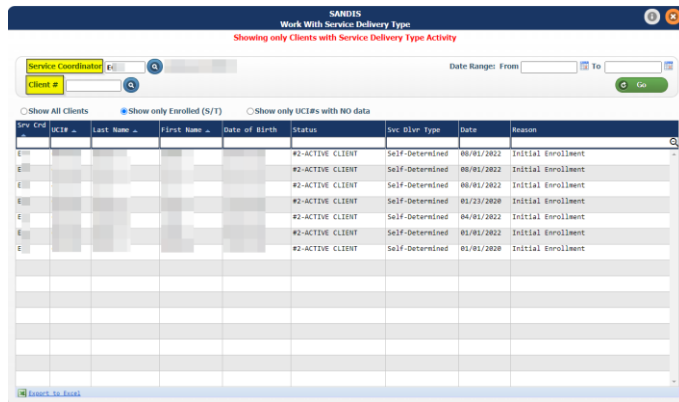
A new program is available at the Service Coordinator level that displays a high-level view of all clients enrolled in SDP.

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 shown in a list. 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 cross access to. Type in the desired caseload code next to **Service Coordinator** and press Enter or click the  icon to view a listing of Service Coordinator names and caseload codes.



SANDIS
Work With Service Delivery Type
Showing only Clients with Service Delivery Type Activity

Service Coordinator: []
Client #: []
Date Range: From [] To []

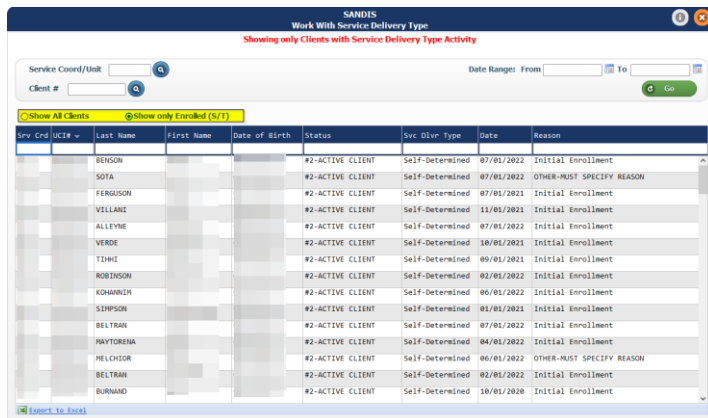
Show All Clients Show only Enrolled (S/T) Show only UCIs with NO data

Svc Crg	UCI#	Last Name	First Name	Date of Birth	Status	Svc Dlv'r Type	Date	Reason
E					#2-ACTIVE CLIENT	Self-Determined	08/01/2022	Initial Enrollment
E					#2-ACTIVE CLIENT	Self-Determined	08/01/2022	Initial Enrollment
E					#2-ACTIVE CLIENT	Self-Determined	08/01/2022	Initial Enrollment
E					#2-ACTIVE CLIENT	Self-Determined	01/23/2020	Initial Enrollment
E					#2-ACTIVE CLIENT	Self-Determined	04/01/2022	Initial Enrollment
E					#2-ACTIVE CLIENT	Self-Determined	01/01/2022	Initial Enrollment
E					#2-ACTIVE CLIENT	Self-Determined	01/01/2020	Initial Enrollment

[Export to Excel](#)

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

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.



SANDIS
Work With Service Delivery Type
Showing only Clients with Service Delivery Type Activity

Service Coord/Unit: []
Client #: []
Date Range: From [] To []

Show All Clients Show only Enrolled (S/T)

Svc Crg	UCI#	Last Name	First Name	Date of Birth	Status	Svc Dlv'r Type	Date	Reason
		BENSON			#2-ACTIVE CLIENT	Self-Determined	07/01/2022	Initial Enrollment
		SOTA			#2-ACTIVE CLIENT	Self-Determined	07/01/2022	OTHER-MUST SPECIFY REASON
		FERGUSON			#2-ACTIVE CLIENT	Self-Determined	07/01/2021	Initial Enrollment
		VILLANI			#2-ACTIVE CLIENT	Self-Determined	11/01/2021	Initial Enrollment
		ALLEYNE			#2-ACTIVE CLIENT	Self-Determined	07/01/2022	Initial Enrollment
		VERDE			#2-ACTIVE CLIENT	Self-Determined	10/01/2021	Initial Enrollment
		TIHI			#2-ACTIVE CLIENT	Self-Determined	09/01/2021	Initial Enrollment
		ROBINSON			#2-ACTIVE CLIENT	Self-Determined	02/01/2022	Initial Enrollment
		KOHARLH			#2-ACTIVE CLIENT	Self-Determined	06/01/2022	Initial Enrollment
		SIMPSON			#2-ACTIVE CLIENT	Self-Determined	01/01/2021	Initial Enrollment
		BELTRAN			#2-ACTIVE CLIENT	Self-Determined	07/01/2022	Initial Enrollment
		HAYTOBENA			#2-ACTIVE CLIENT	Self-Determined	04/01/2022	Initial Enrollment
		HELCHOR			#2-ACTIVE CLIENT	Self-Determined	06/01/2022	OTHER-MUST SPECIFY REASON
		BELTRAN			#2-ACTIVE CLIENT	Self-Determined	02/01/2022	Initial Enrollment
		BURNAND			#2-ACTIVE CLIENT	Self-Determined	10/01/2020	Initial Enrollment

[Export to Excel](#)

The list can be further sorted and filtered.

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

Srv Cnd	UCI#	Last Name	First Name	Date of Birth	Status	Svc Div Type	Date	Reason
		YOUNG			#2-ACTIVE CLIENT	Self-Determined	04/01/2021	Initial Enrollment
		WRIGHT			#2-ACTIVE CLIENT	Self-Determined	11/01/2021	Initial Enrollment
		WRIGHT			#2-ACTIVE CLIENT	Self-Determined	07/01/2021	Initial Enrollment
		WONG			#2-ACTIVE CLIENT	Self-Determined	05/01/2021	Initial Enrollment
		WONG			#2-ACTIVE CLIENT	Self-Determined	05/01/2021	Initial Enrollment
		WONG			#2-ACTIVE CLIENT	Self-Determined	08/01/2021	Initial Enrollment
		WILLIAMS			#2-ACTIVE CLIENT	Self-Determined	07/01/2021	Initial Enrollment
		WHITTY			#2-ACTIVE CLIENT	Self-Determined	09/01/2021	Initial Enrollment
		WALENDOVSKY			#2-ACTIVE CLIENT	Self-Determined	03/01/2020	Initial Enrollment
		VIRABOUTH			#2-ACTIVE CLIENT	Self-Determined	03/01/2022	Initial Enrollment
		VIRABOUTH			#2-ACTIVE CLIENT	Self-Determined	03/01/2022	Initial Enrollment
		VELLANE			#2-ACTIVE CLIENT	Self-Determined	11/01/2021	Initial Enrollment
		VERDE			#2-ACTIVE CLIENT	Self-Determined	10/01/2021	Initial Enrollment
		VARDAN			#2-ACTIVE CLIENT	Self-Determined	01/01/2022	Initial Enrollment
		TRUJILLO			#2-ACTIVE CLIENT	Self-Determined	07/01/2021	Initial Enrollment



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

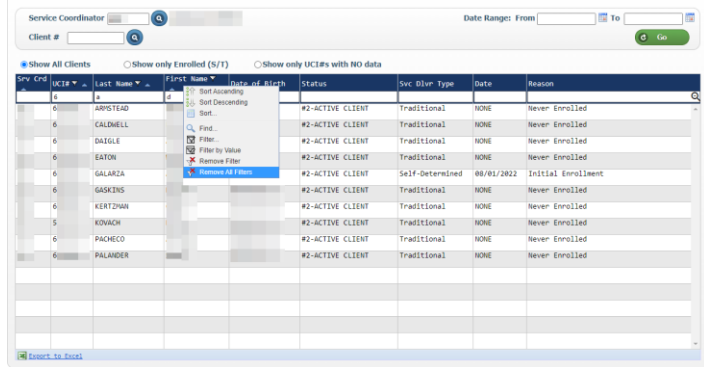
For example, typing ‘Wong’ in the **Last Name** field will limit the results to clients with the last name Wong.

Srv Cnd	UCI#	Last Name	First Name	Date of Birth	Status	Svc Div Type	Date	Reason
		WONG			#2-ACTIVE CLIENT	Self-Determined	05/01/2021	Initial Enrollment
		WONG			#2-ACTIVE CLIENT	Self-Determined	05/01/2021	Initial Enrollment
		WONG			#2-ACTIVE CLIENT	Self-Determined	08/01/2021	Initial Enrollment

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.

Srv Cnd	UCI#	Last Name	First Name	Date of Birth	Status	Svc Div Type	Date	Reason
0		REGINALD			IENT	Traditional	NONE	Never Enrolled
0		RASHAD			IENT	Traditional	NONE	Never Enrolled
0		ADAM			IENT	Traditional	NONE	Never Enrolled
0		WALTER			IENT	Traditional	NONE	Never Enrolled
0		ALAN			IENT	Self-Determined	08/01/2022	Initial Enrollment
0		SHANE			#2-ACTIVE CLIENT	Traditional	NONE	Never Enrolled
0		COLE			#2-ACTIVE CLIENT	Traditional	NONE	Never Enrolled
0		ELIANA			#2-ACTIVE CLIENT	Traditional	NONE	Never Enrolled
0		ADRIANA			#2-ACTIVE CLIENT	Traditional	NONE	Never Enrolled
0		SARAH			#2-ACTIVE CLIENT	Traditional	NONE	Never Enrolled

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.

Srv Crd	UCI#	Last Name	First Name	Date of Birth	Status	Svc Dlvr Type
NNH		YOURG			#2-ACTIVE CLIENT	Self-Determined
NED		WRIGHT			#2-ACTIVE CLIENT	Self-Determined
NIL		WRIGHT			#2-ACTIVE CLIENT	Self-Determined
3BE		WONG			#2-ACTIVE CLIENT	Self-Determined
3BE		WONG			#2-ACTIVE CLIENT	Self-Determined
PIA		WONG			#2-ACTIVE CLIENT	Self-Determined
NIN		WILLIAMS			#2-ACTIVE CLIENT	Self-Determined
NID		WHITTY			#2-ACTIVE CLIENT	Self-Determined
SCC		WALENDOWSKY			#2-ACTIVE CLIENT	Self-Determined
NIA		VIRABOUTH			#2-ACTIVE CLIENT	Self-Determined
NIA		VIRABOUTH			#2-ACTIVE CLIENT	Self-Determined
32B		VILLANI			#2-ACTIVE CLIENT	Self-Determined
NCD		VERDE			#2-ACTIVE CLIENT	Self-Determined
33I		VARDAN			#2-ACTIVE CLIENT	Self-Determined
NCG		TRUJILLO			#2-ACTIVE CLIENT	Self-Determined

[Export to Excel](#)

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

Date of Birth	Status	Svc Dlvr Type	Date
02/12/1995	#2-ACTIVE CLIENT	Self-Determined	04/01/2021
01/27/2005	#2-ACTIVE CLIENT	Self-Determined	11/01/2021
02/10/1997	#2-ACTIVE CLIENT	Self-Determined	07/01/2021
10/15/2007	#2-ACTIVE CLI	Select	05/01/2021
06/18/2010	#2-ACTIVE CLIENT	Self-Determined	05/01/2021
03/06/2012	#2-ACTIVE CLIENT	Self-Determined	08/01/2021
03/16/2000	#2-ACTIVE CLIENT	Self-Determined	07/01/2022
08/06/1985	#2-ACTIVE CLIENT	Self-Determined	09/01/2021
04/30/2009	#2-ACTIVE CLIENT	Self-Determined	03/01/2020

Doing so will take you to the client's **Service Delivery Tracking** record to view and where 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

