

7.8 View / Edit Provider Budget SRWs

Click on the **SRWs** link to view Site/Route/Workers details. All the Site/Route/Workers associated with this Provider will appear.

Provider: ALAMANCE COUNTY TRANSPORTATION AUTHORITY(G004)			
Region: PIEDMONT TRIAD COG			
County: Alamance			
Service: TRANSPORTATION			
SRWCode	Description		
100	TRANSIT BUS	Details	Service Totals
401	GENERAL TRANSP	Details	Service Totals
455	RALEIGH EAST SIDE	Details	Service Totals
501	SHAW TOWN COMMUNITY	Details	Service Totals
555	BURLINGTON PLACE	Details	Service Totals
Add Provider Site/Route/Worker		Provider Budgets	Cancel

Figure 88 – Site/Route/Workers Details

Click on **Provider Budgets** OR **Cancel** to return to the previous screen.

Click on the **Add Provider Site/Route/Worker** button to add a new SRW.

This information is pulled from the Provider Budgets

Add Provider Site/Route/Worker

Provider Code : G004
 Agency Name : ALAMANCE COUNTY TRANSPORTATION AUTHORITY
 Region : PIEDMONT TRIAD COG
 County : Alamance
 Service : TRANSPORTATION(250)

Site/Route/Worker Code :

Description :

Enter a 3-digit number and a description

Click Add to save new SRW.

Figure 89 – Add Site/Route/Worker

Users may add the information in the two editable fields and click **Add** to save or **Cancel** to return to the previous screen.

The Site/Route/Worker Code field cannot be left blank. If the exact same Site/Route/Worker Code already exists for the service and county, an error message will display.

Click on [Details](#) to make changes to the Provider Site/Route/Worker Information.

Provider: ALAMANCE COUNTY TRANSPORTATION AUTHORITY(G004)
 Region: PIEDMONT TRIAD COG
 County: Alamance
 Service: TRANSPORTATION

SRWCode	Description		
100	TRANSIT BUS	Details	Service Totals
401	GENERAL TRANSP	Details	Service Totals
455	RALEIGH EAST SIDE	Details	Service Totals
501	SHAW TOWN COMMUNITY	Details	Service Totals
555	BURLINGTON PLACE	Details	Service Totals

Add Provider Site/Route/Worker Provider Budgets Cancel

Click **Details** to view or add new clients to the Site/Router/Worker Information.
 Click **Service Totals** to add or update monthly Service Total records for clients

Figure 90 - Site/Route/Worker Information

Provider Site/Route/Worker Information

Provider Code : G004
 Agency Name : ALAMANCE COUNTY TRANSPORTATION AUTHORITY
 Region : G
 County : Alamance
 Service : TRANSPORTATION(250)
 Site/Route/Worker Code : 455
 Description : RALEIGH EAST SIDE

CreateUser: Arms.Provider
 CreateTime: 3/9/2007 2:51:08 PM
 ModifyUser: Arms.Provider
 ModifyTime: 5/30/2007 3:45:01 PM
 Clients :

SSN4	Name	Sex	Date Of Birth	Client Status		
2*	BAITY RUTH	F	2/	A	[Remove]	Details
2L	CHANDLER GAYLE	F	5/	A	[Remove]	Details
	GANT MARY	F	10	A	[Remove]	Details
	GODFREY SARAH	F	1/	A	[Remove]	Details
1111	HARRELL BOB	M	7/1,	A	[Remove]	Details

BAKER-0770 5-0815-10-10
[\[Add\]](#)

[Update](#) [Cancel](#)

Edit Description

Clients can only be added to SRW if the following is met **BOTH** items

1. Provider Client Status must be Active
2. Service Status must be Active.

Figure 91 – S/R/W Additional Details

The **Remove** feature will only allow the user to remove a client from the SRW that do not have any units on the service total record.

To view Service Totals for a client, click **Details**. The service total record displays for the client.

Provider Site/Route/Worker Service Totals																
Provider: FRIENDSHIP ADULT DAY SERVICES(G002)										Region - County : G - Alamance						
Service : ADULT DAY CARE(030) [Maximum monthly units: 0]										Site/Route/Worker : 100 - ADULT DAY CARE						
SSN4	Name	Status	Date Of Birth	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
1111	BEAM JOHN	A	12/23/1933	20	23											43
				20	23	0	0	0	0	0	0	0	0	0	0	43

Figure 92—Service Details (from Site/Route/Worker)

Enter the total monthly units by month. Users may modify the figures in any month. Click one of the four buttons...

- **Verify** - Recalculate the Totals.
- **Update** - Save the changes and return to previous screen
- **Provider Budgets** to return to the Provider Budgets screen without saving
- **Cancel** to return to the previous screen without saving

The user can click on **Service Totals** to go directly to the Service Totals Report screen.

SRWCode	Description	Details	Service Totals
100	TRANSIT BUS	Details	Service Totals
401	GENERAL TRANSP	Details	Service Totals
455	RALEIGH EAST SIDE	Details	Service Totals
501	SHAW TOWN COMMUNITY	Details	Service Totals
555	BURLINGTON PLACE	Details	Service Totals

In this example, the client status = D and is highlighted in red to indicate the client is death. This system will not allow additional units to be added for the month after the death date has been saved in ARMS. When keying units, the cursor will skip clients that have a status of D or I (Inactive).

Provider Site/Route/Worker Service Totals																
Provider: ALAMANCE COUNTY TRANSPORTATION AUTHORITY(G004)										Region - County : G - Alamance						
Service : TRANSPORTATION(250) [Maximum monthly units: 250]										Site/Route/Worker : 455 - RALEIGH EAST SIDE						
SSN4	Name	Status	Date Of Birth	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
245	BAITY RUTH	D	11/11/1933													0
223	CHANDLER GAYLE	A	5/6/1966													0
243	GANT MARY	A	10/2/1939													0
423	GODFREY SARAH	A	1/1/1934													0
111	HARRELL BOB	R	7/1/1934													0
				0	0	0	0	0	0	0	0	0	0	0	0	0

A = Active Client – client record updated in the new ARMS system
D = Death
R = New Registration for Current Fiscal Year.

Figure 93 - Service Totals Data Entry Screen