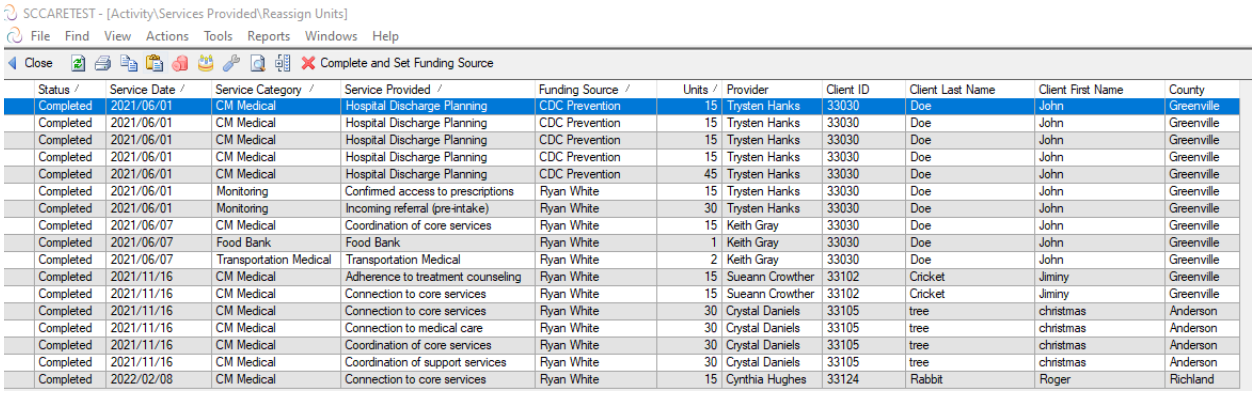
How to Change Funding Source, Service Category and/or Service Name on Service Provided Records

Supervisors have the ability to change the funding sources on Service Provided records in Provide® Enterprise.

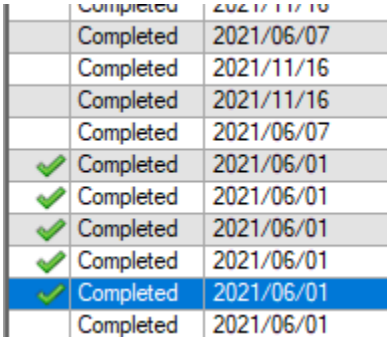
To do this, follow the steps below:

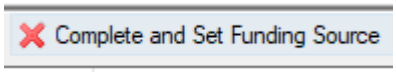
- Navigate to View\Activity\Services Provided\Reassign Units. This view only includes Services from the last 18 months that have not been deleted.



Status	Service Date	Service Category	Service Provided	Funding Source	Units	Provider	Client ID	Client Last Name	Client First Name	County
Completed	2021/06/01	CM Medical	Hospital Discharge Planning	CDC Prevention	15	Trysten Hanks	33030	Doe	John	Greenville
Completed	2021/06/01	CM Medical	Hospital Discharge Planning	CDC Prevention	15	Trysten Hanks	33030	Doe	John	Greenville
Completed	2021/06/01	CM Medical	Hospital Discharge Planning	CDC Prevention	15	Trysten Hanks	33030	Doe	John	Greenville
Completed	2021/06/01	CM Medical	Hospital Discharge Planning	CDC Prevention	15	Trysten Hanks	33030	Doe	John	Greenville
Completed	2021/06/01	CM Medical	Hospital Discharge Planning	CDC Prevention	45	Trysten Hanks	33030	Doe	John	Greenville
Completed	2021/06/01	Monitoring	Confirmed access to prescriptions	Ryan White	15	Trysten Hanks	33030	Doe	John	Greenville
Completed	2021/06/01	Monitoring	Incoming referral (pre-intake)	Ryan White	30	Trysten Hanks	33030	Doe	John	Greenville
Completed	2021/06/07	CM Medical	Coordination of core services	Ryan White	15	Keith Gray	33030	Doe	John	Greenville
Completed	2021/06/07	Food Bank	Food Bank	Ryan White	1	Keith Gray	33030	Doe	John	Greenville
Completed	2021/06/07	Transportation Medical	Transportation Medical	Ryan White	2	Keith Gray	33030	Doe	John	Greenville
Completed	2021/11/16	CM Medical	Adherence to treatment counseling	Ryan White	15	Sueann Crowther	33102	Cricket	Jiminy	Greenville
Completed	2021/11/16	CM Medical	Connection to core services	Ryan White	15	Sueann Crowther	33102	Cricket	Jiminy	Greenville
Completed	2021/11/16	CM Medical	Connection to core services	Ryan White	30	Crystal Daniels	33105	tree	christmas	Anderson
Completed	2021/11/16	CM Medical	Connection to medical care	Ryan White	30	Crystal Daniels	33105	tree	christmas	Anderson
Completed	2021/11/16	CM Medical	Coordination of core services	Ryan White	30	Crystal Daniels	33105	tree	christmas	Anderson
Completed	2021/11/16	CM Medical	Coordination of support services	Ryan White	30	Crystal Daniels	33105	tree	christmas	Anderson
Completed	2022/02/08	CM Medical	Connection to core services	Ryan White	15	Cynthia Hughes	33124	Rabbit	Roger	Richland

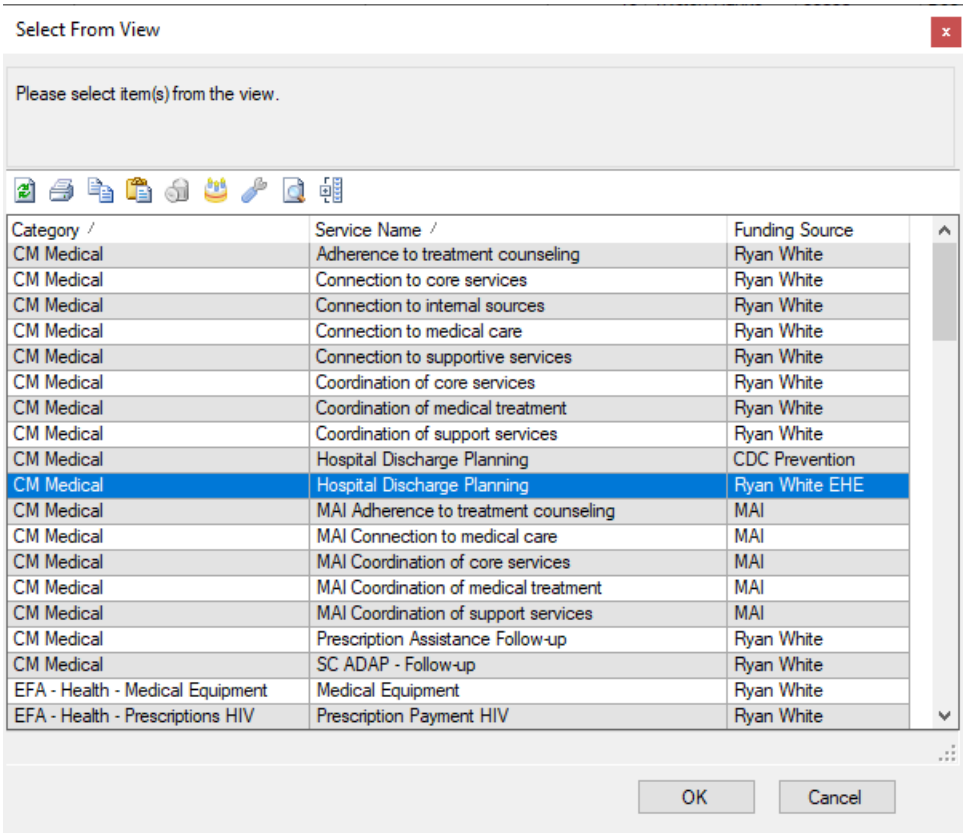
- Click in the empty column next to the “Status” column for each unit that you want to reassign Service Category, Service Provided and/or Funding Source. This will place a green checkmark

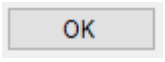
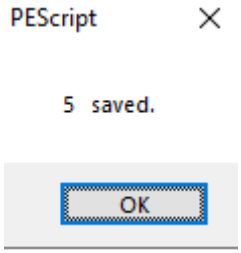


- Click the 

button on the task bar. A Dialog Box similar to that in the figure below will open:

- Find the Service Category, Service Name and Funding source that you wish to move the selected units to. NOTE: The choices in the list that you see will vary depending on what your agency is funded to provide.



- Click on the Service Category, Name or Funding Source to highlight the selected row, similar to that in the above figure.
- Click the 

button to continue. The selected Service Category, service name and Funding Source will be applied to the selected services.
- A dialog box similar to that in the figure below will open on your screen to let you know that the services have been modified.