Service Accounts - Client Service Accounts - Create, View, Edit, or Deactivate

Description: In this topic, the user will learn how to create, view, edit, or deactivate client service accounts. For programs, in order for attendance to be generated for clients, there must be an active service account linking the client to the program in which they are enrolled. Client service accounts are not required for hourly services.

*Please note: This task requires a supervisor role in the same cost center as the client. If the client has a home cost center for which the supervisor does not have a supervisor role, the home cost center supervisor must create the service account from the client details page.

Role Required: Super User, Supervisor

Permission Required: N/A

Required Entities Before Creation:

- Cost Center
- Funding Source
- Service Code
- Client Funding Account
- Program Profile or Employee Profile (depending on the type of account)

Create a Client Service Account

1. Log into DCI personal profile
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Enter the client's name in the filter and click **Search**
5. Click anywhere in the row to open the **Client Details** page
6. Click **Actions**
7. Select **New Service Account.** Complete the form wizard in the same manner as an Employee Service Account. When creating a Client Service Account, the following account types are available:
    a. Hourly
    b. Residential Program
    c. Day Program
    d. Group Service
    e. Parenting Program
    f. Transportation
    g. Client Transportation
8. Click **Save** to continue and **Yes** to confirm

Create a Client Service Account from the Residential, Day, Group Service, or Parenting Program Page

1. Log in to DCI personal profile
2. Click **Home** on the main menu
3. Click the **Program Type** (Residential Programs, Day Programs, Group Services, or Parenting Programs) on the submenu
4. Search for the program by typing the name in field "Type (Program) Name" and selecting it
5. Click **Search**
6. **Click anywhere in the row** to select the program
7. Click **Actions**
8. Select **New Client Service Account** from the drop-down menu
9. Complete the **form wizard**
10. Click **Save** and **Yes** to confirm

View, Edit, or Deactivate a Client Service Account

1. Log in to DCI personal profile
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Enter the client's name in the filter and click **Search**
5. **Click anywhere in the client row** to open the Client Details page
6. Click the **Accounts** tab
7. **Click anywhere in the client service account row** to open the Account Details page
8. Click **Actions**
9. Select **Edit Account** from the drop-down menu
10. View and make edits in the Edit Account form wizard

    i. Client service accounts should be deactivated when the client discontinues the service (i.e., the client is discharged)
    a. To deactivate the service account, change the status to **Inactive.**
11. Click **Save** and **Yes** to confirm

View, Edit, or Deactivate a Client Service Account from the Cost Center, Residential, Day, Group Service, or Parenting Program Page

1. Log in to DCI personal profile
2. Click **Home** on the main menu
3. Click the **Program Type** (Residential Programs, Day Programs, Group Services, or Parenting Programs) or **Cost Center** on the submenu
4. Enter the cost center or program in the filter and click **Search**
5. **Click anywhere in the row** to select the cost center or program
6. Click the **Accounts** tab
7. **Click anywhere in the client service account row** to open the Account Details page
8. Click **Actions**
9. Select **Edit Account** from the drop-down menu
10. View and make edits in the Edit Service Account form wizard
    a. To deactivate the service account, change the status to **Inactive.**
        i. Client service accounts should be deactivated when the client discontinues the service (i.e., the client is discharged)
11. Click **Save** and **Yes** to confirm

Related articles

- Group Service - Supervisor Guide
- Employee Service Accounts vs. Client Service Accounts
- Create Employee Service Accounts - Video
- Service Accounts - Client Service Accounts - Create, View, Edit, or Deactivate