

Batch Service Entry Tip Sheet

This Tip Sheet will walk users through how to use the Batch Service Entry (My Office) screen. The Batch Service Entry screen is a permission that is given after attending Provider Admin Training. This tip sheet may change as trainings are updated. Please visit [the EHR website](#) for the most updated version. If any additional help is needed, you can contact us at bhs-ehrsupport@saccounty.gov.

What is Batch Service Entry?

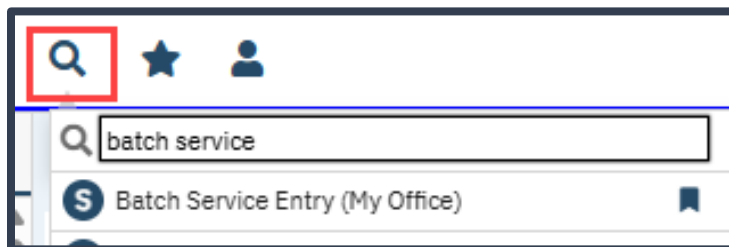
Batch Service Entry is a way for admin staff to enter multiple services for either one client or various clients within a program. This tool is particularly useful for residential or NTP programs who have their own EHR.

Special Considerations for Batch Service Entry

- A progress note will be created if it's required by the procedure code. For this reason, we do not recommend using Batch Service Entry screen for procedure codes such as TCM, Individual Therapy, and Assessment LPHA. It should primarily be used for day rates.
- Clinical staff do not have access to this feature. Admin staff will be the ones to enter services within Batch Service Entry.
- If you include too many services, the system may lock you out of the screen. It is typically safe to enter around 10-15 services without being locked out. You can enter more, however, if you get locked out of the screen (receive an error message when trying to access Batch Service Entry) you will need to contact the help desk to unlock the screen.

Batch Service Entry for a Single Client

1. Search **Batch Service Entry (My Office)** on the search icon.



2. The filters at the top will default to what was entered prior. Those filters will determine which clients are being displayed below. You'll want to make sure you have the **Date**, the **Program** selected, and select the **Last Name Begins With**. The other filters can be left blank. Click **Apply Filter** to view your results.

Batch Service Entry

04/07/2026 APCC-TWC-14th Ave(34CNPZ) Staff Name All Procedure Groups **Apply Filter**

Client Preference M TU W TH F Also Include Complete/Show Services for the day Only Show Clients Seen In Last 90 Days

Last Name Begins With T Organizational Hierarchy

Default Values

- The Default Values section will show all clients enrolled in that program during that time whose last name begins with the letter selected. The date of service will begin on the date you selected. Before adjusting anything next to the client's name, enter the **Staff, Procedure Code, Time In, Duration, Location and Mode of Delivery**. For residential services a Time out is not required.

Default Values

Staff Procedure Code Time In Time Out Dur. Location Mode Of Delivery

	Client Name	Staff	Procedure Code	Date	Time In	Time Out	Dur.	Location
<input type="checkbox"/>	Test Amber (800464858)	<input type="checkbox"/> All Clinician	<input type="text"/>	04/07/202	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Test Bruno (800464866)	<input type="checkbox"/> All Clinician	<input type="text"/>	04/07/202	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Test Dodger (800464865)	<input type="checkbox"/> All Clinician	<input type="text"/>	04/07/202	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Test Error	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- Click on the **Plus Sign** for the client you want to enter services for. Each time you click on the plus sign a new line will open. All the information entered above will carry forward to the line below. You will just need to adjust the **date** for each line. You can ignore the top line, that only has the date.

Staff Procedure Code Time In Time Out Dur. Location Mode Of Delivery

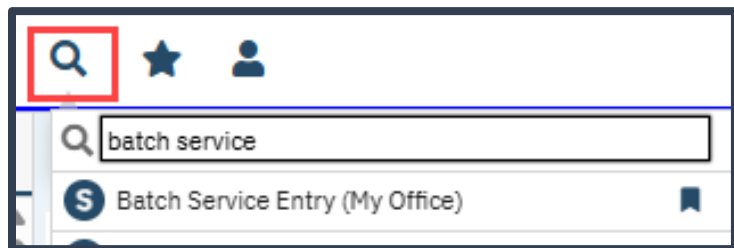
Draper, Amanda Adult Residential Day 8:00 AM 8:00 AM 1 Office Face-to-face

	Client Name	Staff	Procedure Code	Date	Time In	Time Out	Dur.	Location
<input type="checkbox"/>		<input type="checkbox"/> All Clinician	<input type="text"/>	04/16/202	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Test Amber (800464858)	<input checked="" type="checkbox"/> Draper, Am	Adult Residential Day	04/16/202	8:00 AM	8:00 AM	1	Office
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> Draper, Am	Adult Residential Day	04/16/202	8:00 AM	8:00 AM	1	Office
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> Draper, Am	Adult Residential Day	04/16/202	8:00 AM	8:00 AM	1	Office

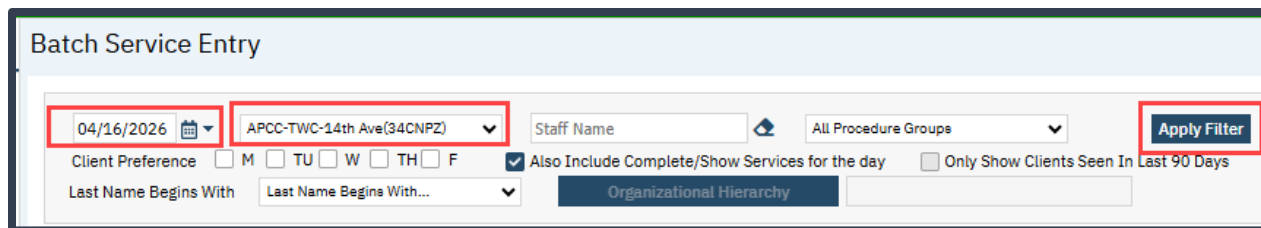
- Once complete, click **Save** at the upper right of the screen.

Batch Service Entry for Multiple Clients

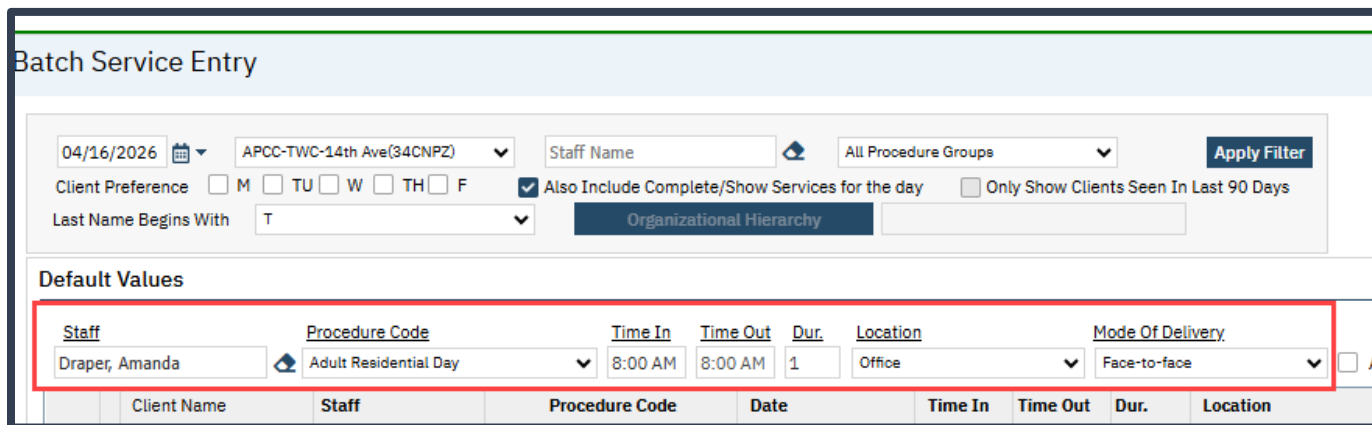
1. Search **Batch Service Entry (My Office)** on the search icon.



2. The filters at the top will default to what was entered prior. Those filters will determine which clients are being displayed below. You'll want to make sure you have the **Date** and the applicable **Program** selected. The other filters can be left blank. Click **Apply Filter** to view your results.



3. The Default Values section will show all clients enrolled in that program during that time. The date of service will begin on the date you selected. Before adjusting anything next to the client's name, enter the **Staff**, **Procedure Code**, **Time In**, **Time Out**, **Duration**, **Location** and **Mode of Delivery**. For residential services a Time out is not required.



- Click the **plus sign** for each client. This will bill the information on the line above for each of those clients.

Staff	Procedure Code	Time In	Time Out	Dur.	Location	Mode Of Delivery			
Draper, Amanda	Adult Residential Day	8:00 AM	8:00 AM	1	Office	Face-to-face	<input type="checkbox"/> Apply Default V		
Client Name	Staff	Procedure Code	Date	Time In	Time Out	Dur.	Location	Com	
+ Test Amber (800464858)	<input type="checkbox"/> All Clinician		04/16/202						
	<input checked="" type="checkbox"/> Draper, Am	Adult Residential Day	04/16/202	8:00 AM	8:00 AM	1	Office		
+ Test Bruno (800464866)	<input type="checkbox"/> All Clinician		04/16/202						
	<input checked="" type="checkbox"/> Draper, Am	Adult Residential Day	04/16/202	8:00 AM	8:00 AM	1	Office		
+ Test Error (800464857)	<input type="checkbox"/> All Clinician		04/16/202						
	<input checked="" type="checkbox"/> Draper, Am	Adult Residential Day	04/16/202	8:00 AM	8:00 AM	1	Office		
- Test Felix									

- Click **Save** to save the services.