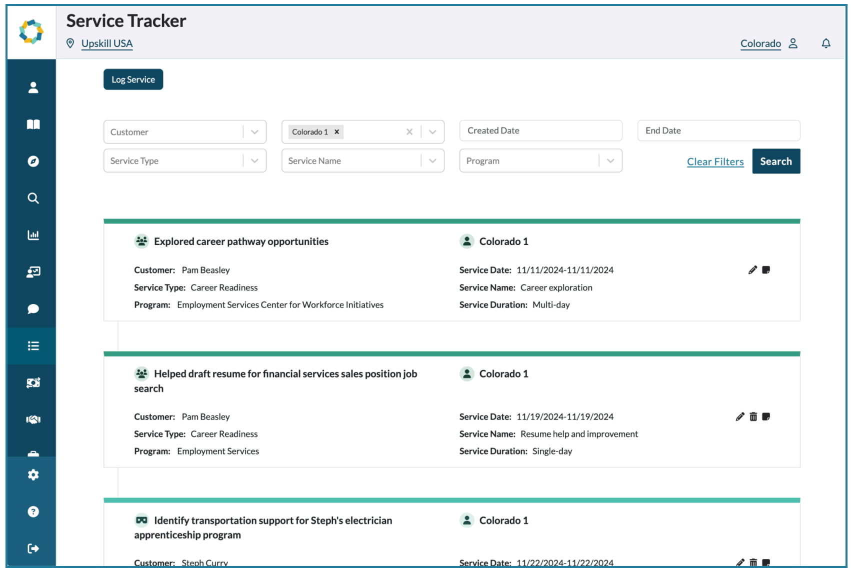
PAIRIN

MY JOURNEY
SERVICE TRACKER
Desk Guide for Professionals

Committed to making a positive impact **together**.

Introduction

This onboarding guide will inform you about the benefits of the Service Tracker, guide you through the configuration process to align the Service Tracker to your needs, and equip you on how to use it effectively.



My Journey's Service Tracker provides a simple way to log case management services and activities for Customers along with associated reporting.

Professionals can:

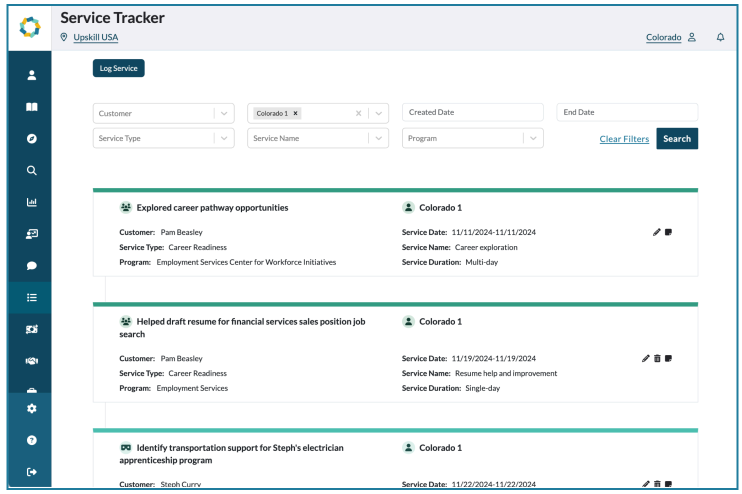
- Log services provided to customers (such as career or training services),
- Search and filter logged services by customer name, professional name, date, Service Type, Service Name, or Program, and
- Run service history reports with summaries or details on services logged at particular locations, across locations, for particular customers, and/or by particular professionals or across professionals.

Benefits

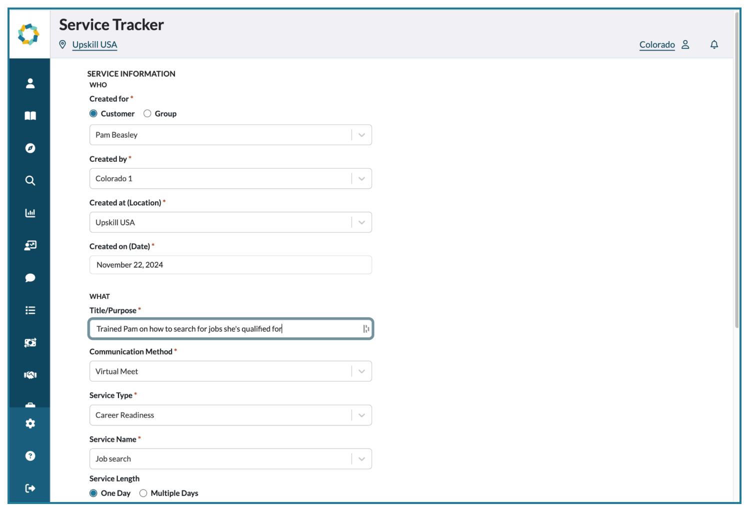
The Service Tracker simplifies and strengthens how professionals manage and measure service impact. More specifically, it provides

- **Streamlined tracking:** Quickly log and monitor every service provided to create one unified customer record and ensure no detail is missed
- **Enhanced insights:** Access in-depth insights to understand the impact of your services
- **Improved reporting:** Generate clear, comprehensive reports to demonstrate results to stakeholders and funders with ease

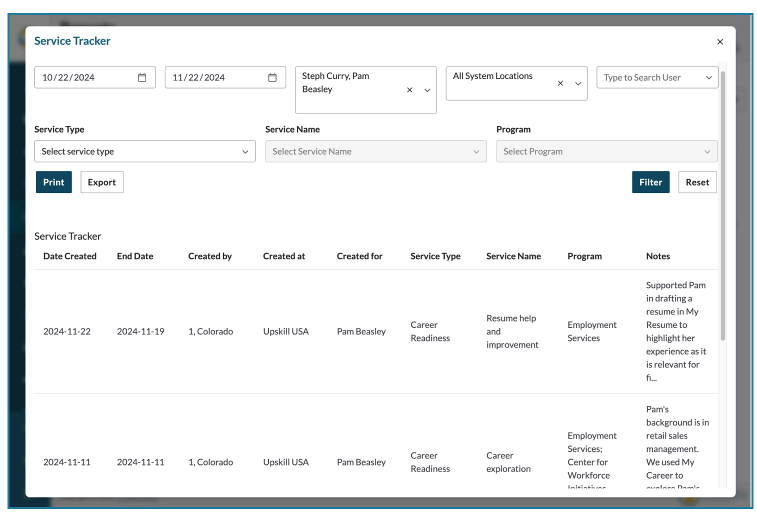
Key service information is front and center, so professionals can quickly access the **details that matter most**



An intuitive, single-page layout makes service logging **faster and smoother**



Simplified reports are easy to run with multiple filter options and feature useful details, like notes



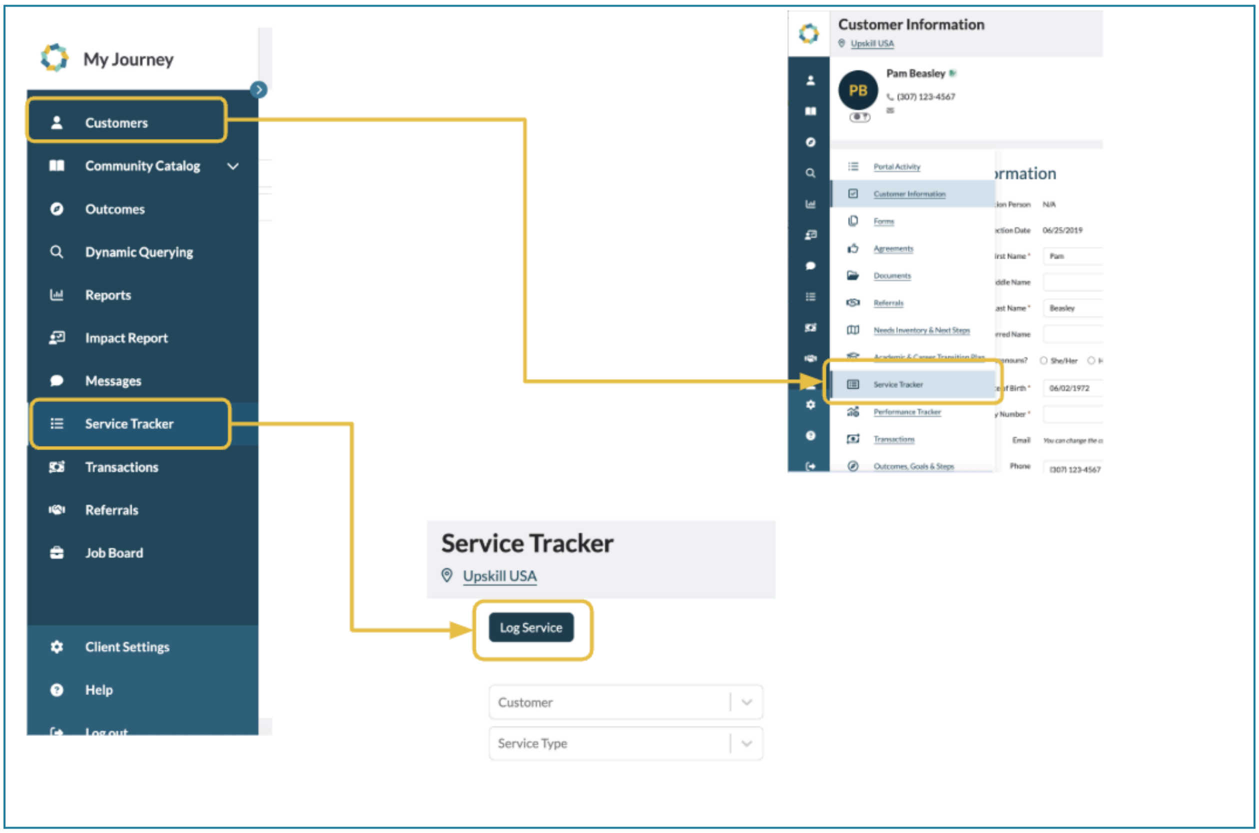
How to log a service

Step-by-step instructions

Step 1 – Access Service Tracker: Log into your instance of My Journey / My Pro Center and open the Service Tracker from either:

- Selecting "Service Tracker" in the left-hand panel and clicking "Log Service" or
- Open Service Tracker from within a customer's record.

The screen shot below shows both methods.



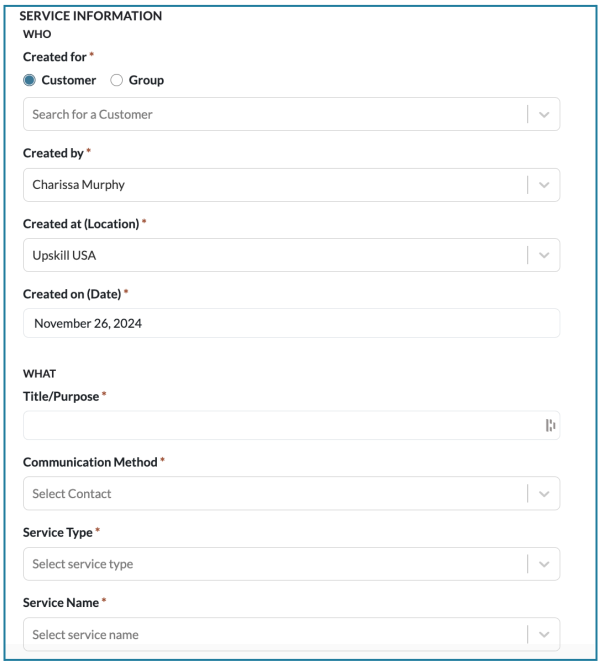
Step 2 – Fill out required fields: Enter the Title/Purpose, Communication Method, Service Type, Service Name, and any Notes.

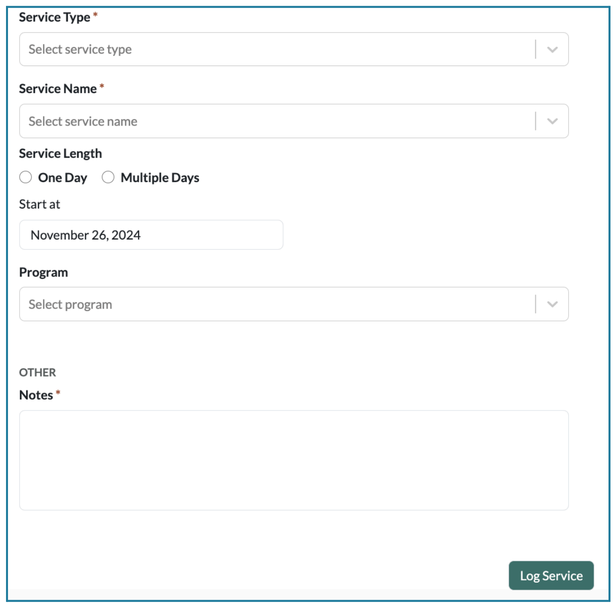
- Service Names appear after choosing a Service Type.

Step 3 – Add additional details: Optional fields include service length, start date, and Programs.

- Programs appear after choosing a Service Name.

Step 4 – Save entry: Click "Log Service." You'll return to the main Service Tracker page, where you can search, filter.





Suggested best practices and tips from PAIRIN

- **Establish standard templates for the Title/Purpose and Notes fields and train professionals** on those templates to establish consistency in the structure and content for what is provided in each of those open text fields. This will provide clearer instructions for professionals to follow and improve quality and efficiency for service log and customer record reviews. It will also improve the ease of customer handoffs among professionals.

- **Document and train professionals on a standard process for when services should be logged** (e.g., no later than 1 business day after a service is completed).

    - Include in the process whether the "Created on (Date)" should be the actual date entered or the date of the service.

- Use **Groups** to log a service for a group of individuals (e.g., if there's a cohort of customers who are involved in a particular series of classes or services on the same dates). Most clients have Group Services available. If you are unsure, please reach out to your PAIRIN Customer Success Consultant.

- Groups must be created before they can be selected from the Service Tracker.
- To create a Group, go to Messages in the left-hand panel and select "Message Groups" then "New Message Group." Enter the required fields and any additional Description (optional) and click "Save." Then that group will be searchable within the Service Tracker when the "Group" radio button is selected at the top of the log service page.

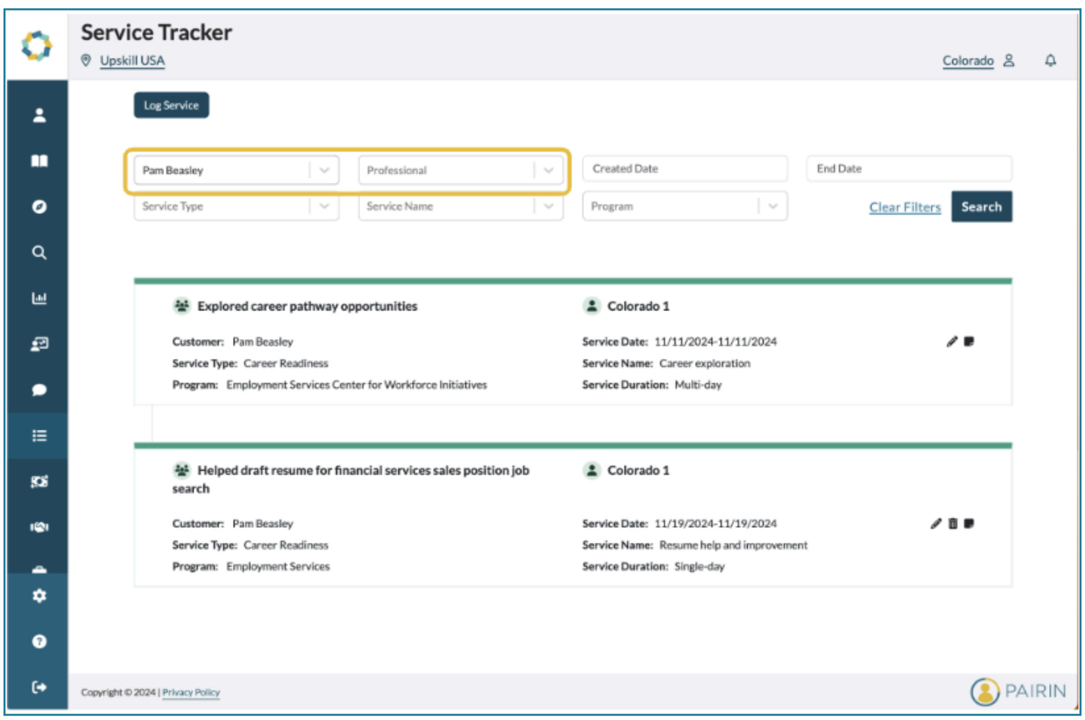
- Review Service Tracker field options annually and provide a single, team-approved Service Tracker Template list of requested edits to PAIRIN to ensure they're up-to-date.

Filter and view all logged services

Step-by-step instructions

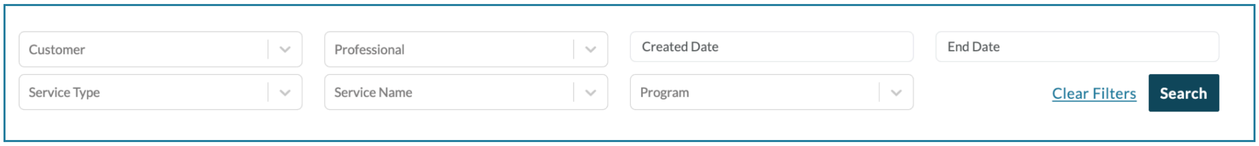
Step 1 – Set / adjust filters to view all services logged for a particular customer: On the main Service Tracker page, select the desired filters to view the relevant logged service history.

- Start entering the customer's name in the Customer field and select the correct name.
- Clear your name from the "Professional" field
- View the services logged for the selected customer



Step 2 – Refine results: Select and/or enter the desired filter options to view services logged by those particular field options.

- Filter options: You can filter by Customer name, Professional name, Created Date or End Date, Service Type, Service Name, or Program name
- Service history for each customer is visible to all approved professionals, providing a complete record across service points.



Suggested best practices and tips from PAIRIN

- Remember to clear out any fields if you do not want the service log results narrowed to that selection
- There is logic built into Service Type > Service Name > Program, so you must select Service Type before you can select a Service Name and you must select a Service Name before you can select a Program
- Reminder tip from Step 1: Document and train professionals on a standard process for when services should be logged (e.g., no later than 1 business day after a service is completed).
    - Include in the process whether the "Created on (Date)" should be the actual date entered or the date of the service. This will make using the filters to view service history more user friendly and consistent.

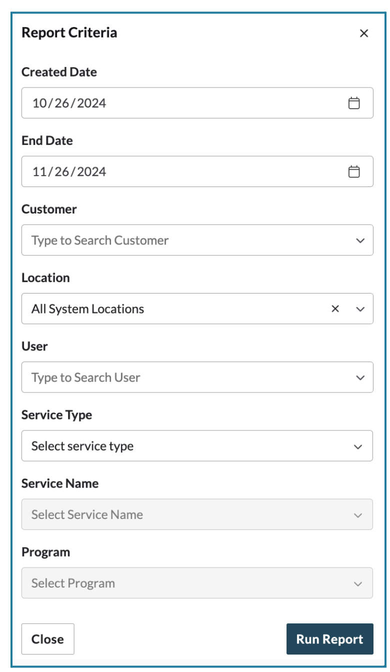
Generate Service Tracker reports

Step-by-step instructions

Step 1 – Open report: Go to "Reports" from the left-hand panel, then select "View" to open the Service Tracker report.

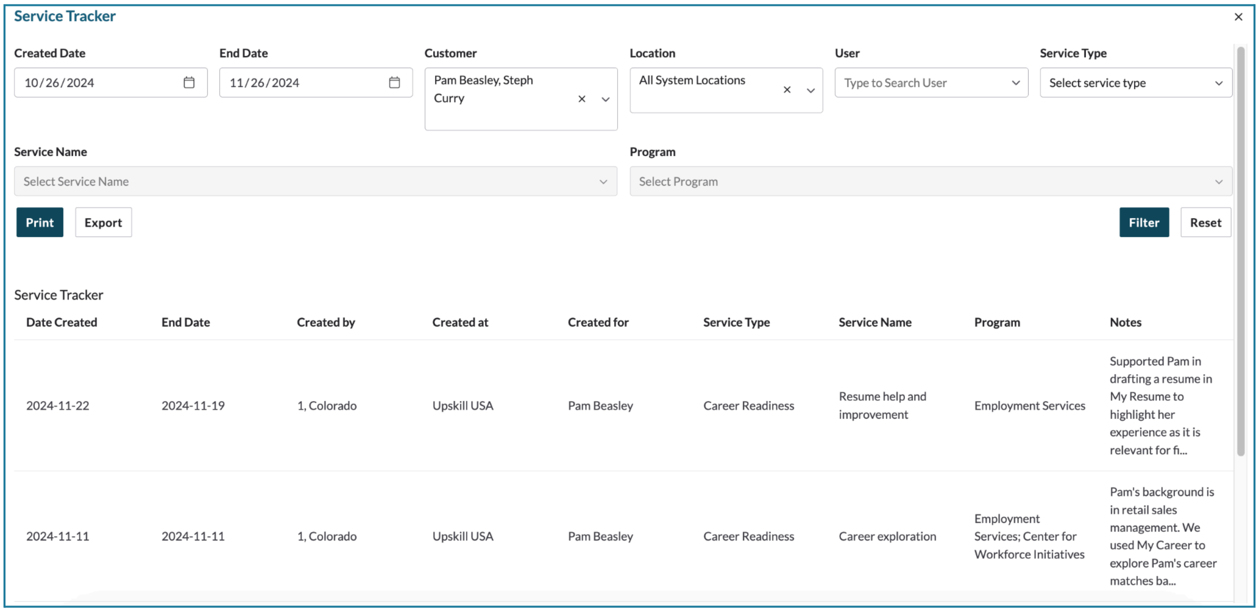
Step 2 – Set report criteria: Choose filters such as Created Date, Service End Date, Customer, Location, User (professional name), Service Type, Service Name, and/or Program.

- Then click "Run Report."



Step 2 – Refine results: Once the results run, you can further refine the filters as desired. Click "Filter" to reset the report data based on the selected filters.

Step 3 – Save results: Click "Print" to print or click "Export" and select Excel, CSV, or PDF to export to the desired export type.



Suggested best practices and tips from PAIRIN

- Customer, Location, and User fields allow multi-selection. You can select multiple in each of those fields to narrow the report results as desired.
- To further analyze the data, export to Excel or CSV to utilize filter, sort, and/or pivot options.