FINANCIAL TRANSACTION SHEETS ON MOBIZIO

Using the app

- Sync the app
- Select the service user
- Scroll down and click on JRH – Service User Records
- Click on 'Service User Forms'
- Click on 'FINANCE'

If you are creating a new sheet (a new sheet should be started every day)

- Click on the plus sign (+) at the top right of the app and select 'FINANCIAL TRANSACTION SHEET'
- Enter all of the relevant details. (REMEMBER - you will need to enter the previous balance from the last time there was a transaction)
- You'll notice that as you enter figures in the 'Debit' or 'Credit' columns the new balance is automatically calculated and entered.
- Once signed, select the green 'SUBMIT' button
- **NEVER** under any circumstances delete an entry (the 'X' above the date). If a mistake has been made please inform your Team Manager

If you are adding a transaction to an existing sheet from the same day
- Click on the 3 dots at the top right of the app and select 'Edit Form'
- Scroll down to the last entry and click on the '+' sign saying 'Add Row'
- Enter all of the relevant details. (REMEMBER - you will need to enter the previous balance from the last time there was a transaction)
- You'll notice that as you enter figures in the 'Debit' or 'Credit' columns the new balance is automatically calculated and entered.
- Once signed, select the green 'SUBMIT' button
- **NEVER** under any circumstances delete an entry (the 'X' above the date). If a mistake has been made please inform your Team Manager

PETTY CASH TRANSACTION SHEETS ON MOBIZIO

- Sync the app
- Select the property
- Scroll down and click on JRH – Service User Records
- Click on 'Service User Forms'
- Click on 'FINANCE'

If you are creating a new sheet (a new sheet should be started every day)

- Click on the plus sign (+) at the top right of the app and select 'PETTY CASH TRANSACTION SHEET'
- Enter all of the relevant details. (REMEMBER - you will need to enter the previous balance from the last time there was a transaction)
- You'll notice that as you enter figures in the 'Debit' or 'Credit' columns the new balance is automatically calculated and entered.
- Once signed, select the green 'SUBMIT' button
- **NEVER** under any circumstances delete an entry (the 'X' above the date). If a mistake has been made please inform your Team Manager

If you are adding a transaction to an existing sheet from the same day
- Click on the 3 dots at the top right of the app and select 'Edit Form'
- Scroll down to the last entry and click on the '+' sign saying 'Add Row'
- Enter all of the relevant details. (REMEMBER - you will need to enter the previous balance from the last time there was a transaction)
- You'll notice that as you enter figures in the 'Debit' or 'Credit' columns the new balance is automatically calculated and entered.
- Once signed, select the green 'SUBMIT' button
- **NEVER** under any circumstances delete an entry (the 'X' above the date). If a mistake has been made please inform your Team Manager

DEBIT CARD TRANSACTION SHEET ON MOBIZIO

- Select the service user
- Scroll down and click on JRH – Service User Records
- Click on 'Service User Forms'
- Click on 'FINANCE'
- Click on the plus sign (+) at the top right of the app and select 'DEBIT CARD TRANSACTION SHEET'
- Complete the form (you'll need to look at the previous completed form to insert the 'Previous Balance' entry
- Click on the 'SUBMIT' button
- **NEVER** under any circumstances delete an entry (the 'X' above the date). If a mistake has been made please inform your Team Manager

DEBIT CARD WITHDRAWAL RECORD ON MOBIZIO

- Select the service user
- Scroll down and click on JRH – Service User Records
- Click on 'Service User Forms'
- Click on 'FINANCE'

- Click on the plus sign (+) at the top right of the app and select 'DEBIT CARD WITHDRAWAL RECORD'
- Complete the signing out part of the form
- Click on the 'SUBMIT' button
- To sign the card back in you'll need to open the same form and complete the signing in part and then click on the 'SUBMIT' button
- **NEVER** under any circumstances delete an entry (the 'X' above the date). If a mistake has been made please inform your Team Manager