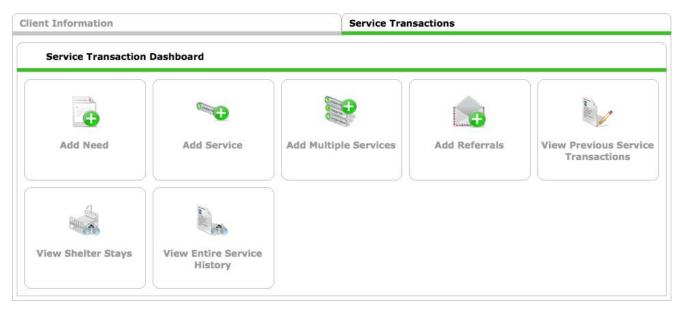# Service Transactions Addendum SP5.11

This document provides further guidance on creating Service Transactions. The Standard Workflow (PDF) must be initiated prior to adding services. Services are to be added after an Entry into the program has been created, and before a client Exits from the program. Services will be applied to all household members who are benefiting from the service.

Add Multiple Services

Add Multiple Services is intended for use when adding more than one service transaction, but may also be used to add a single service. This is the recommended workflow.

1. Household Members = Include household members that are also receiving the service

2. Service Provider = Select the program that is providing the service by choosing from the pick list, if available, or by selecting [Search] or [My Provider]. The Service Provider should match the Entry/Exit Provider.

Service List
1. Number of Services = Enter the number of the specified service that was provided. Typically the number of Services = 1.

2. Start Date = Date the service is provided. This date cannot occur before the program **Entry Date**.

3. End Date = Date that the service ended or is scheduled to end. This date may be the same as the **Start Date**. However, this date cannot occur before the **Service Start Date** or after the program **Exit Date.** Each service must have an **End Date** recorded.

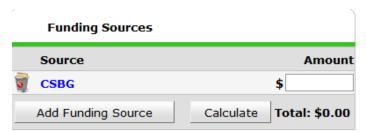4. Service Type = Select the **Service** that is provided.

5. <u>Provider Specific Service</u> = If applicable, select the specified service as identified by your program.

6. <u>Service Location</u> = If applicable, select the specified location that the service occurred as identified by your program.

7. <u>Service Staff</u> = If applicable, select the specified staff that provided the service as identified by your program.

Service Costs

1. <u>Number of Units</u> = If applicable, enter a numerical value of how much is being provided. Examples may include: 2 gas cards, 1 month of rent, 1 hour of Case Management, etc.

2. <u>Unit Type</u> = Defines how the unit is being measured. Select the appropriate type from the provided pick list, if applicable. Examples may include: Hours, Vouchers, Months, etc.

3. <u>Cost per Unit</u> = This value is calculated by the system based on the number of units and Total Cost of Units values.

4. <u>Total Cost of Units </u> = Total cost for this service

Apply Funds for Service

1. <u>Funding Sources</u> = If applicable, | Add Funding Source | to designate the grant(s) that is paying for this service.

   a. ⊕ Funding Source and designate the amount per Funding Source

Funding Sources	
Source	**Amount**
🗑 CSBG	$
Add Funding Source	Calculate	Total: $0.00

Need Information

1. <u>Need Status</u> and <u>Outcome of Need</u> = Select the current status and Outcome of the Need that is being met through the specified Service. Most often, the Need is **Closed** and the Outcome is **Fully Met** once the Service has been provided.

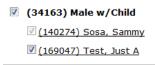2. <u>If Need is Note Met, Reason</u> = Leave blank if a Service is being provided

| Add Another | to include additional services and repeat the process above, or select | Save & Exit | once complete.

| Back to Dashboard | to return to the **Service Transaction Dashboard**

Add Service

Add Service is intended for use when adding a single service transaction. The workflow is very similar to adding Multiple Services, but there are the added options such as attaching **Support Documentation,** adding **Follow Up Information,** or complete additional assessment questions.

1. <u>Household Members</u> = Include household members that are also receiving the service
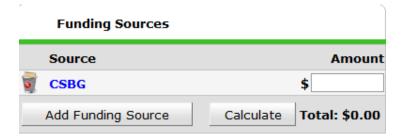

2. <u>Service Provider</u> = Select the program that is providing the service by choosing from the pick list, if available, or by selecting [Search] or [My Provider]. The Service Provider should match the Entry/Exit Provider.

3. <u>Start Date</u> = Date the service is provided. This date cannot occur before the program **Entry Date**.

4. <u>End Date</u> = Date that the service ended or is scheduled to end. This date may be the same as the **Start Date**. However, this date cannot occur before the **Service Start Date** or after the program **Exit Date.** Each service must have an **End Date** recorded.

5. <u>Service Type</u> = Select the *Service* that is provided.

6. <u>Provider Specific Service</u> = If applicable, select the specified service as identified by your program.
7. <u>Service Location</u> = If applicable, select the specified location that the service occurred as identified by your program.

8. <u>Service Staff</u> = If applicable, select the specified staff that provided the service as identified by your program.

9. Service Notes = Enter notes specific to the Service if more information is to be provided.

Service Costs

1. <u>Number of Units</u> = If applicable, enter a numerical value of how much is being provided. Examples may include: 2 gas cards, 1 month of rent, 1 hour of Case Management, etc.

2. <u>Unit Type</u> = Defines how the unit is being measured. Select the appropriate type from the provided pick list, if applicable. Examples may include: Hours, Vouchers, Months, etc.

3. <u>Cost per Unit</u> = This value is calculated by the system based on the number of units and Total Cost of Units values.

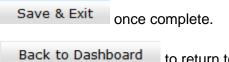4. <u>Total Cost of Units</u> = Total cost for this service

Apply Funds for Service

1. <u>Funding Sources</u> = If applicable, [Add Funding Source] to designate the grant(s) that is paying for this service.

    a. Funding Source and designate the amount per Funding Source

Need Information

1. <u>Need Status</u> and <u>Outcome of Need</u> = Select the current status and Outcome of the Need that is being met through the specified Service. Most often, the Need is **Closed** and the Outcome is **Fully Met** once the Service has been provided.

2. <u>If Need is Note Met, Reason</u> = Not applicable if Service is being provided

 once complete.

 to return to the **Service Transaction Dashboard**

Add a Need

Add Need is used to capture client needs that will not be met through this program's services, and improves reporting on unmet needs.

1. Household Members = Include household members that are also receiving the service

    ☑ **(34163) Male w/Child**
       ☑ (140274) Sosa, Sammy
       ☑ (169047) Test, Just A

1. Provider = Select the program that is assessing the Need by choosing from the pick list, if available, or by selecting [Search] or [My Provider].
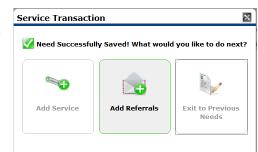
Need Information

2. Need = Select the client's Need from the pick list provided, or [Look Up] the closest term that fits the client's need. If you are unable or unsure how to use the **Look Up** feature, contact the HMIS Help Desk for support.

3. Date of Need = Date the Need was identified. ***Date of Need*** = Must be completed

4. Amount if Financial = Enter a dollar amount, if applicable.

5. Notes = Enter notes specific to the Need if more information is to be provided.

Need Status

1. Need Status = Select the current status from the provided pick list.

2. Outcome of Need = Select the Outcome from the provided pick list.

3. If Need is Note Met, Reason = Select the closest reason why from the provided pick list.

[Save & Continue] to display the **Service Transaction** screen, as shown on the right. Users may choose to add a corresponding **Service** or **Referral** at this time. Otherwise, click **Exit** to return to **Previous Needs** on the Needs tab.

[Back to Dashboard] to return to the **Service Transaction Dashboard**
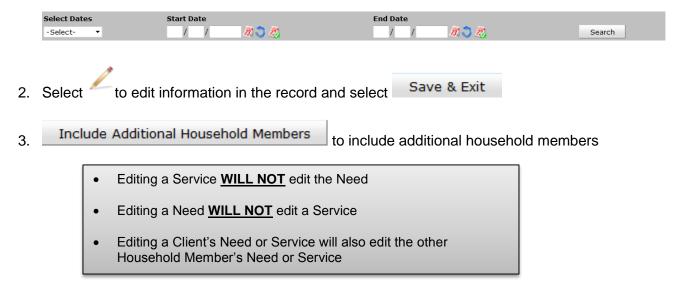
Edit or Remove Needs and Services

Editing or Removing Needs and Services should be used with great caution in order to avoid inaccurate reporting and unnecessary data entry.

1. From the **Service Transaction** tab within the Client's record, select the **Entire Service History** tab to view both Needs and Services, otherwise choose an alternative tab.

Edit

1. Locate the item to be edited. You may limit items viewed by using the Search feature.

2. Select ✏ to edit information in the record and select [Save & Exit]

3. [Include Additional Household Members] to include additional household members

- Editing a Service **WILL NOT** edit the Need

- Editing a Need **WILL NOT** edit a Service

- Editing a Client's Need or Service will also edit the other Household Member's Need or Service

Remove

🗑 will delete a Need or Service.

- Deleting a Need **WILL** delete the Service

- Deleting a Service **WILL NOT** delete the Need

- Deleting a Need/Service **WILL NOT** delete the Need or Service from the other Household Member's record.

Add

🔧➕ select to add a Service to an existing Need

✉➕ select to add a Referral to an existing Need