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# HMIS Support Manual - Creating Service Transactions

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**Summit County, Ohio  
Homeless Management Information System**



# SERVICE TRANSACTIONS IN HMIS

- Entering Service Transactions in ServicePoint allows the HMIS User to record a Client's need(s), to record the service(s) provided to meet that need, and to refer clients to other providers who can meet their needs
  - a. For example, employment might be identified as a **need** for a Client. A next step could be to provide a **service** of job training
  - b. The terminology can be confusing with the many lists of needs and services, so often times the services can be built into a quick list by the HMIS administrator
- If a provider cannot meet a Client's need because, a. the provider does not offer the service, b. the client is not eligible for the service, or c. any other reason, a referral can be made to another provider that can furnish the appropriate service
- Entering a Client's needs and services provides a complete and accurate picture of the services that have been provided to that client by a particular program
  - a. Tracking these service transactions could help identify such things as service gaps and/or trends in the community

## Adding a Service:

Use this function when adding a single service to a Client file:

1. Search for and select the Client in **ClientPoint**:

Summit County Continuum of Care  
December 25, 2020

Client Search > Client Search

Please Search the System before adding a New Client.

Name: First, Middle, Last, Suffix  
Name Data Quality: -Select-  
Alias:   
Social Security Number:  -  -   
Social Security Number Data Quality: -Select-  
U.S. Military Veteran?: -Select-  
Exact Match:   
Search ACTIVE Clients:   
Search INACTIVE / DELETED Clients:   
Search ALL Clients:

Client Number  
Enter or scan a Client ID number to go directly to that Client's profile.  
Client ID #: 2834 Submit

2. Click the **Service Transactions** tab to display the **Service Transaction Dashboard**:

Client - (2834) Test, Just A

(2834) Test, Just A  
Release of Information: None

Service Transactions

Service Transaction Dashboard

Add Need, Add Service, Add Multiple Services, Add Referrals, View Previous Service Transactions, View Shelter Stays, View Entire Service History

# SERVICE TRANSACTIONS IN HMIS

3. Click the [Add Service] button:

Client - (2834) Test, Just A Mass Visibility Update

(2834) Test, Just A  
Release of Information: None -Switch to Another Household Member-

Client Information Service Transactions

**Service Transaction Dashboard**

Add Service

Add Multiple Services

Add Referrals

View Previous Service Transactions

View Shelter Stays

View Entire Service History

Start Date \* 12 / 25 / 2020   5  : 01  : 14  PM

End Date    :  :

Service Type \* -Select-

Provider Specific Service -Select-

4. The **Add Service** screen will be displayed:

Client - (2834) Test, Just A Mass Visibility Update

(2834) Test, Just A  
Release of Information: None -Switch to Another Household Member-

Client Information Service Transactions

**Add Service**

**Household Members**

To include Household members for this Service, click the box beside each name. Only members from the SAME Household may be selected.

(100179) Two Parent Family

- (2834) Test, Just A (Primary Client)
- (132618) Test, Baby
- (150098) Test, Wifey A
- (179144) test, Justy (Left Household: 09/10/2020)

Service Provider \* Summit County Continuum of Care (3)

Creating User Candy Petticord

Start Date \* 12 / 25 / 2020   5  : 01  : 14  PM

End Date    :  :

Service Type \* -Select-

Provider Specific Service -Select-

# SERVICE TRANSACTIONS IN HMIS

- Select the household members to be included in the service - If all household members are receiving the service, click the checkbox next to the household type in the **Household Members** section:

**Household Members**

To include Household members for these Services, click the box beside each name. Only members from the SAME Household may be selected.

(100179) Two Parent Family

(2834) Test, Just A

(132618) Test, Baby

(150098) Test, Wifey A

(179144) test, justy (Left Household: 09/10/2020)

- Please note that “test, justy” should not be included in this selection because he left the household in September of 2020
- The **Service Provider** field defaults to the location from which the services are being added – In this case, we are using “Summit County Continuum of Care” (only for example):
    - The field defaults to the HMIS User’s current (**Enter Data As**) provider
    - Click [**Search**] to change the provider by locating a provider using the standard ServicePoint provider lookup or click [**My Provider**] to reset the provider to the default
    - Click [**Clear**] to reset the field
  - Enter a **Start Date** and **End Date** for the service in **mm/dd/yyyy** format
  - Select a **Service Type** by clicking the [**Look Up**] button to assign a service term using the AIRS taxonomy
  - The **Provider Specific Services** are those not found in the AIRS taxonomy, therefore this response may be left as “**Select**”. These responses will not appear on reports
  - Click [**Save & Continue**]:

**Add Service**

**Household Members**

To include Household members for this Service, click the box beside each name. Only members from the SAME Household may be selected.

(100179) Two Parent Family

(2834) Test, Just A (Primary Client)

(132618) Test, Baby

(150098) Test, Wifey A

(179144) test, justy (Left Household: 09/10/2020)

**Service Provider \*** Summit County Continuum of Care (3)

Creating User: Candy Petticord

**Start Date \*** 12/25/2020 5:01:14 PM

**End Date** 01/25/2021 12:00:00 PM

**Service Type \*** Emergency Food (BD-1800)

**Provider Specific Service** -Select-

# SERVICE TRANSACTIONS IN HMIS

## Adding Multiple Services:

1. Search for and select the Client in **ClientPoint**:

Summit County Continuum of Care  
December 26, 2020

ClientPoint > Client Search

Client Search

Please Search the System before adding a New Client.

Name: First, Middle, Last, Suffix

Name Data Quality: -Select-

Alias: [Text Field]

Social Security Number: [Text Field]

Social Security Number Data Quality: -Select-

U.S. Military Veteran?: -Select-

Exact Match:

Search ACTIVE Clients:

Search INACTIVE / DELETED Clients:

Search ALL Clients:

Search, Clear, Add New Client With This Information

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #: 2834 Submit

2. Click the **Service Transactions** tab to display the **Service Transaction Dashboard**:

Client - (2834) Test, Just A

Mass Visibility Update

(2834) Test, Just A

Release of Information: None

-Switch to Another Household Member- Submit

Client Information

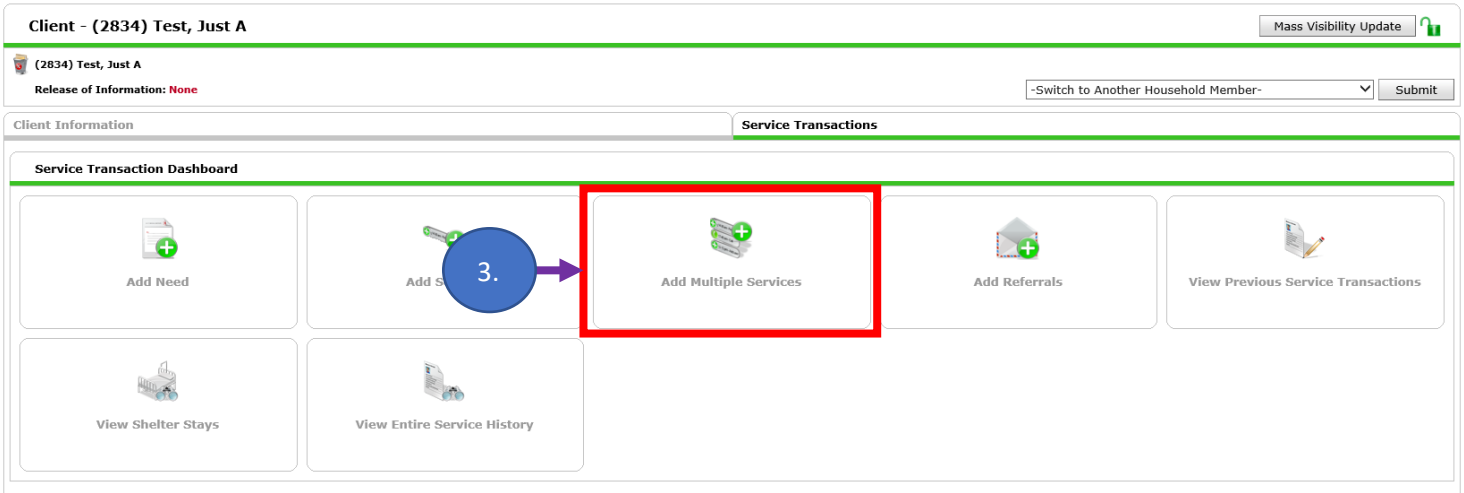
Service Transactions

Service Transaction Dashboard

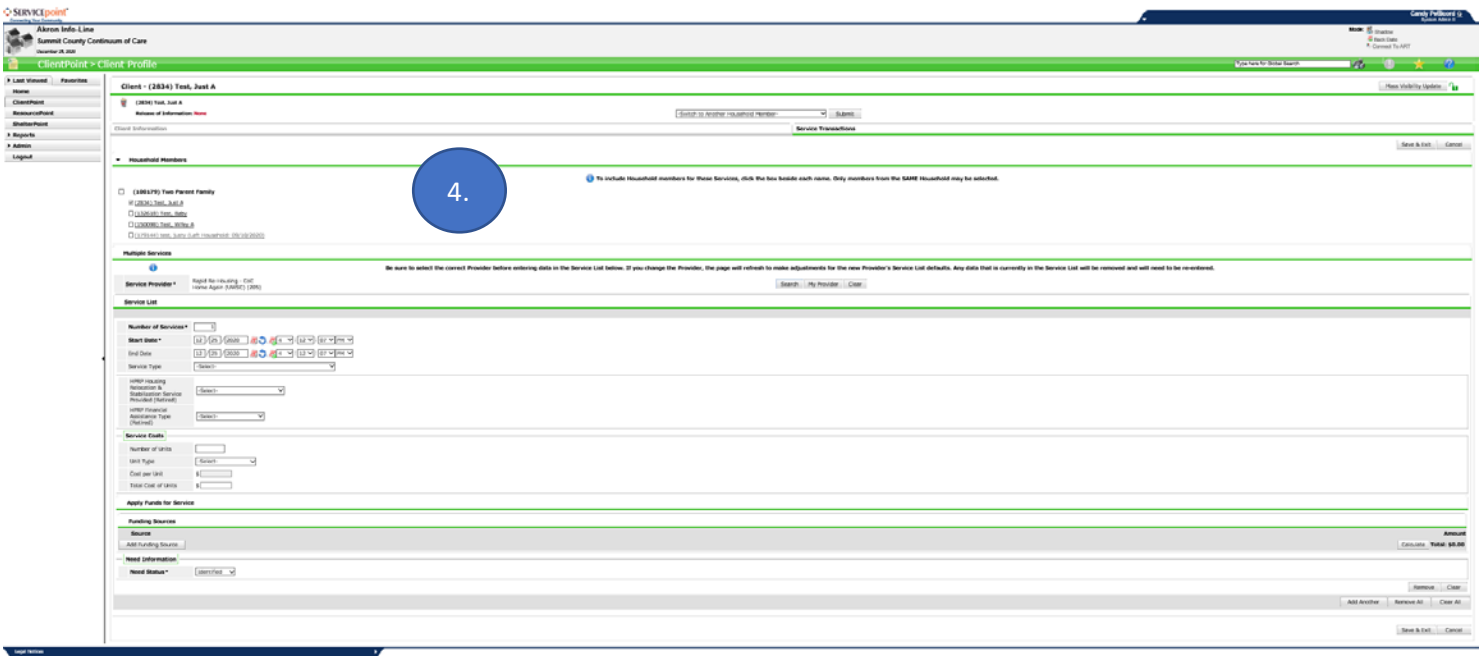
Add Need, Add Service, Add Multiple Services, Add Referrals, View Previous Service Transactions, View Shelter Stays, View Entire Service History

# SERVICE TRANSACTIONS IN HMIS

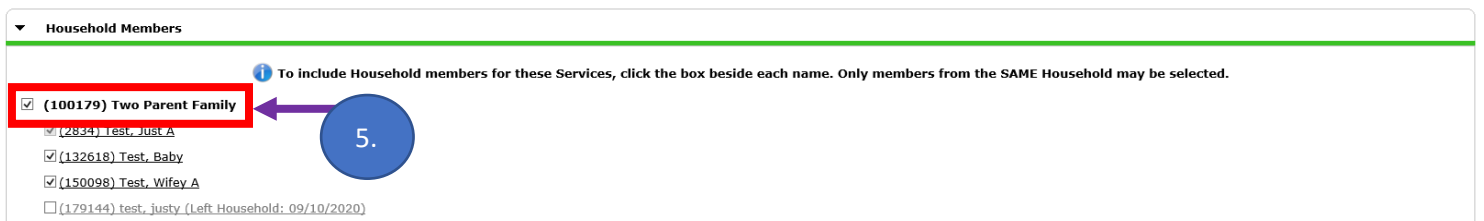
3. Click the [Add Multiple Services] button:



4. The Add Service screen will be displayed:



5. The first portion of this screen allows the selection of the household members included in the services - If all household members are receiving the services, click the checkbox next to the household type in the Household Members section:



# SERVICE TRANSACTIONS IN HMIS

b. Please note that “test, justy” should not be included in this selection because he left the household in September of 2020

6. The **Service Provider** field defaults to the location from which the services are being added – In this case, we are using “RRH - Home Again”:

**Multiple Services**

Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.

Service Provider \* Rapid Re-Housing - CoC Home Again (UWSC) (205) Search My Provider Clear

6.

7. Enter the **Number of Services\*** being provided, the **Start Date**, **End Date**, and **Service Type** of the service being provided:

**Service List**

Number of Services \*  Start Date \* 12/25/2020 End Date 12/25/2020 Service Type Rental Deposit Assistance (BH-3800.7250)

7.

8. The **Need Status\*** is Closed:

**Need Information**

Need Status \* Closed Remove Clear

8.

9. Click **[Add Another]** if adding another service (9a) or click **[Save & Exit]** (9b) if finished.

**Need Information**

Need Status \* Identified Remove Clear

9a. Add Another Remove All Clear All

9b. Save & Exit Cancel

10. The **Service** has now been added to the Client’s record:

**Client - (2834) Test, Just A** Mass Visibility Update

(2834) Test, Just A -Switch to Another Household Member- Submit

Release of Information: **None**

**Client Information** **Service Transactions**

Needs Services Referrals Shelter Stays Entire Service History

**Previous Services**

Select Dates Start Date End Date Search

Service Start Date	Service End Date	Service Type	Provider of Service	Service Provided	Funding Sources
12/25/2020	01/25/2021	Rental Deposit Assistance	Rapid Re-Housing - CoC Home Again (UWSC)	Yes	

10.

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Add Service Add Multiple Services Back to Dashboard Exit

# SERVICE TRANSACTIONS IN HMIS

11. By clicking on the **[Edit Pencil]** shown in the image above, on the next screen, the HMIS User will notice that the **Service Provider** and **Service Type** fields have become read-only

<b>Service Provider *</b>	Rapid Re-Housing - CoC Home Again (UWSC) (205)
Creating User	Candy Petticord
<b>Start Date *</b>	12 / 25 / 2020    5 : 44 : 44 PM
End Date	01 / 25 / 2021    5 : 44 : 44 PM
<b>Service Type *</b>	Rental Deposit Assistance (BH-3800.7250)

- The **Edit Pencil icon** must be selected to modify these values
- If the newly selected Service Provider is not compatible with a Funding Source selected for the service, a warning pop-up window will display

12. Further Information regarding the provided Service can be entered in the **Service Notes** section:

Service Notes	<div style="border: 1px solid gray; height: 50px; width: 100%;"></div>
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13. The **Service Costs** section can be used to capture financial data related to financial assistance type service transactions:

<b>Service Costs</b>	
Number of Units	<input type="text"/>
Unit Type	-Select- <input type="button" value="v"/>
Cost per Unit	<input type="text"/>
Total Cost of Units	\$ <input type="text"/>

14. In the **Apply Funds for Service** section, clicking the **[Add Funding Source]** button will display a pop-up which allows for the selection of a funding source

**Add Funding Source**

Fund Search

Search for Funds by using keywords for Fund Name, Category, or Description

Search:

Fund Search Results

Fund	Category
CoC 2019	N/A
CoC Hqge 2019	N/A
CoC Hqge 2020	N/A
MCRP 2020	N/A
HOME 2019	N/A
HOME 199A	N/A
HOME-COVID 80A	N/A
OHMS CLIP	N/A
SCVF	N/A
VA	N/A

Showing 1 of 10

- The funding sources available for selection are limited to those that are compatible with the selected Service Provider
- The Calculate button calculates the Total of the Funding Sources included on the service
  - **“Total”** is a calculated field that shows the sum of all Funding Sources
  - It is updated when **[Enter]** is pressed after entering an amount or when the **[Calculate]** button is clicked
  - This button is not a required part of the workflow and is intended to be used for information purposes only

<b>Apply Funds for Service</b>	
<b>Funding Sources</b>	
Source	Amount
Add Funding Source	<input type="button" value="Calculate"/> Total: \$0.00

c. Select the **[Delete]** icon (the **trash can**) to completely delete a Funding Source from a service

<b>Apply Funds for Service</b>	
<b>Funding Sources</b>	
Source	
CoC 2019	
Add Funding Source	



# SERVICE TRANSACTIONS IN HMIS

15. The **Follow Up Information** section allows the user to trigger reminder messages prompting them to perform client specific follow-ups such as three-month service reviews

- a. When a scheduled follow-up becomes due, the utility triggers a reminder message to appear on the HMIS User's home dashboard screen.
- b. Use of the follow-up function is optional.

16. The **Need Information** section is used for recording Client **Need Status, Outcome of Need, and If Need is Not Met, Reason.**

- a. When a service transaction is recorded in ServicePoint, the software automatically records a corresponding client need for that particular service.
- b. The status of the **need** can be set to **Identified, In Progress, or Closed**
- c. The status of the **Outcome of Need** can be recorded as **Fully Met, Partially Met, Service Pending, or Not Met.**
- d. If the **Need is Not Met**, the **Reason** options are: **All Services Full, Client not Eligible, Client Refused Service, Service Does Not Exist, Service Not Accessible.**

17. Click **[Save and Exit]** to display a list of the Client's Services on the **Previous Services** screen:

Service Start Date	Service End Date	Service Type	Provider of Service	Service Provided	Funding Sources
12/25/2020	01/25/2021	Rental Deposit Assistance	Rapid Re-Housing - CoC Home Again (UWSC)	Yes	

I hope you found this manual helpful. 😊 Please feel free to reach out to me with any questions:

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