## Service Transaction for Housing Related Coordinated Entry - Work Instructions



### 1.0 Overview

These instructions provide the necessary steps to enter a Service Transaction with the Service Type set to "Housing Related Coordinated Entry" to track a successful contact with a client within HMIS. A service transaction is a reportable field necessary to track active clients on the By Name List per the CHA System Inactive Policy.

### 2.0 Work Instructions

#### 1. Creating a Service Transaction

- a. Select client profile.
- b. Select "Service Transactions" tab.
- c. Select "Add Service" to record a service

ient information		Service Transact	ions	
Service Transaction Dashboard				
6	0	80		
AGO NEED	Add betwice	Add Multiple Services	Add Referans	Transactions
4	l.			
View Shelter Stays	View Entire Service History			
.1. Select F	Participants			
✓ Househ	old Members			
			To in	
🗌 (59) T	wo Parent Fami	ly		
<u> (13</u>	<u>6) Duck, Donalc</u>	(Primary Clie	ent)	
□ <u>(13</u>	8) Duck, Daffy			
□ (13	7) Duck, Daisy			

1. Creating a Service Transaction

#### 1.1 Select Participants

- a. The list displays all household members from the "Households" tab.
- b. If there are multiple clients within the entry,
  - a. The transaction should be created from person marked as
    - i. "Self" (head of household).
      - a. HMIS marks this person as the Primary Client.
- c. Make sure, only the Primary Client is selected.

# Service Transaction for Housing Related Coordinated Entry - Work Instructions



#### 1.2 Set Service Details

- a. Change "Service Provider" to CHA (4433)
- b. Select "Start Date" and "End Date" for service.
  - i. Dates should align with the date you connect with the Client.
- c. Change Service Type to
  - a. "Housing Related Coordinated Entry".
- d. Select "Save & Continue."

#### **1.3 Enter Service Information**

- a. Enter any "Service Notes" required for chosen Service Type.
- b. Select "Save & Exit."

#### **1.2 Set Service Details**

Service Provider *	Coordinated Housing Access (CoC) CE Clackamas (4433)
Creating User	Marita Gunter
Start Date *	07 / 18 / 2024 🛗 🖸 📅 2 🗸 : 43 🗸 : 00 🗸 PM 🗸
End Date	07 /18 /2024
Service Type *	Housing Related Coordinated Entry (BH-0500.3200)

#### **1.3 Entered Service Information**

Creating User       Marita Gunter         Start Date *       07 / 18 / 2024       10 2 · : 43 · : 00 · PM ·         End Date       07 / 18 / 2024       10 2 · : 43 · : 00 · PM ·         Service Type *       > Housing Related Coordinated Entry (BH-0500.3200)         Provider Specific       -Select · ·         Service Staff       -Select · ·         Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Creating User       Marita Gunter         Start Date *       07 / 18 / 2024       10 2 · : 43 · : 00 · PM ·         End Date       07 / 18 / 2024       10 2 · : 43 · : 00 · PM ·         Service Type *       Housing Related Coordinated Entry (BH-0500.3200)         Provider Specific       -Select · ·         Service Staff       -Select · ·         Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Creating User       Marita Gunter         Start Date *       07 / 18 / 2024       10 2 • : 43 • : 00 • PM •         End Date       07 / 18 / 2024       10 2 • : 43 • : 00 • PM •         Service Type *       Housing Related Coordinated Entry (BH-0500.3200)         Provider Specific       Select •         Service Staff       -Select •         Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist. • Marita G., CHA		(CoC) CE Clackamas (4433)
Start Date *       07       / 18       / 2024       Im © Im 2       : 00 ~ PM ~         End Date       07       / 18       / 2024       Im © Im 2       : 00 ~ PM ~         Service Type *       > Housing Related Coordinated Entry (BH-0500.3200)         Provider Specific       -Select- ~         Service Staff       -Select- ~         Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Start Date *       07       / 18       / 2024       Im © Im 2       : 43 × : 00 × PM ×         End Date       07       / 18       / 2024       Im © Im 2       : 43 × : 00 × PM ×         Service Type *       Im V       Housing Related Coordinated Entry (BH-0500.3200)         Provider Specific       -Select - ×         Service Staff       -Select - ×         Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Start Date *       07       / 18       / 2024       Im © Im 2       : 43 ~ : 00 ~ PM ~         End Date       07       / 18       / 2024       Im © Im 2       : 00 ~ PM ~         Service Type *       Housing Related Coordinated Entry (BH-0500.3200)       PM ~         Provider Specific       -Select - ~         Service Staff       -Select - ~         Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Creating User	Marita Gunter
End Date       07       18       2024       10       2       13       00       PM         Service Type *       It Housing Related Coordinated Entry (BH-0500.3200)         Provider Specific Service       -Select-          Service Staff       -Select-          Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	End Date       07 / 18 / 2024       Im I 2 · : 43 · : 00 · PM ·         Service Type • <ul> <li>Housing Related Coordinated Entry (BH-0500.3200)</li> <li>Provider Specific Service</li> <li>Service Staff</li> <li>Select · ·</li> <li>Service Notes</li> <li>Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA</li> </ul>	End Date       07 / 18 / 2024       11 2 2 2 4 3 2 100 PM 2         Service Type *       Image: Provider Specific Service       -Select - 2         Service Staff       -Select - 2         Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Start Date *	07 / 18 / 2024
Service Type ★              ✓ Housing Related Coordinated Entry (BH-0500.3200)          Provider Specific              -Select- ✓          Service Staff              -Select- ✓          Service Notes              Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist             Marita G., CHA	Service Type ★              ✓ Housing Related Coordinated Entry (BH-0500.3200)          Provider Specific              Select- ✓          Service Staff              -Select- ✓          Service Notes              Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist             Marita G., CHA	Service Type * <ul> <li>Housing Related Coordinated Entry (BH-0500.3200)</li> <li>Provider Specific Service</li> <li>Service Staff</li> <li>Select- </li> <li>Service Notes</li> <li>Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA</li> <li>Marita G., CHA</li> <li>Image: Service Service</li></ul>	End Date	07 / 18 / 2024 📅 🖸 🖬 2 🗸 : 43 🗸 : 00 🗸 PM 🗸
Provider Specific       -Select-          Service Staff       -Select-          Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Provider Specific       -Select-          Service Staff       -Select-          Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Provider Specific       -Select-          Service Staff       -Select-          Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Service Type *	Housing Related Coordinated Entry (BH-0500.3200)
Service Staff       -Select-          Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Service Staff       -Select-          Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Service Staff       -Select-          Service Notes       Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Provider Specific Service	-Select- 🗸
Service Notes Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Service Notes Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Service Notes Connected with client via email. States that they are still in need of services and are wondering about where they are at on the waitlist Marita G., CHA	Service Staff	-Select- 🗸

## a. Click on "View Entire Service History"

1.4 Updating an Open Need for Housing Related

# Service Transaction for Housing Related Coordinated Entry - Work Instructions



- b. Using the most recent Need related to Coordinated Entry,
  - a. click on the "Add Service" icon.
- c. The most recent Need will be located toward the top as history is in chronological order.
- d. Repeat steps 1.2 through 1.4.

Select Dates		Start Date		End Date		
-Select- 🗸			💼 Ð 💼	/	1	1 C 1
	Transaction Type	Date	Provider		Туре	
/	Need	07/18/2024	Coordinated Housing Access (CoC) CE Clackamas		Housin	ig Related Coordinated Entry
/	Service	07/18/2024	Coordinated Housing Access (CoC) CE Clackamas		Housing Related Coordinated Entry	
					Showi	ng 1-1 of 1

### 3.0 Resources

- **3.1 Referenced Material** 
  - <u>CHA System Inactive Policy</u>

#### **3.2 Related Material**

- Service Transactions Work Instructions
- 3.3 Contacts
  - HMISAdmin@clackamas.us