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.
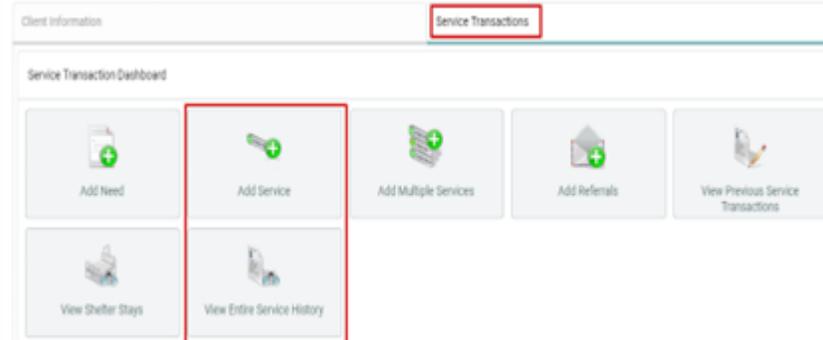
2.0 Work Instructions

1. Creating a Service Transaction

   a. Select client profile.

   b. Select "Service Transactions" tab.

   c. Select "Add Service" to record a service

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.

1.1. Select Participants

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 2 : 43 : 00 PM
Service Type *	Housing Related Coordinated Entry (BH-0500.3200)

1.3 Entered Service Information

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 2 : 43 : 00 PM
Service Type *	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

1.4 Updating an Open Need for Housing Related Coordinated Entry

a. Click on "View Entire Service History"

1.4 Updating an Open Need for Housing Related Coordinated Entry

Document Owner: HCDD /Effective Date:7/15/2024

Printed versions of this document may be outdated. Find the most up to date version online.

Page | 2

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.

3.0 Resources

3.1 Referenced Material
- CHA System Inactive Policy

3.2 Related Material
- Service Transactions Work Instructions

3.3 Contacts
- HMISAdmin@clackamas.us