

Service Transactions - Work Instructions



1.0 Overview

These work instructions encompass creating a transaction, adding multiple services, voiding and deleting transactions.

2.0 Work Instructions

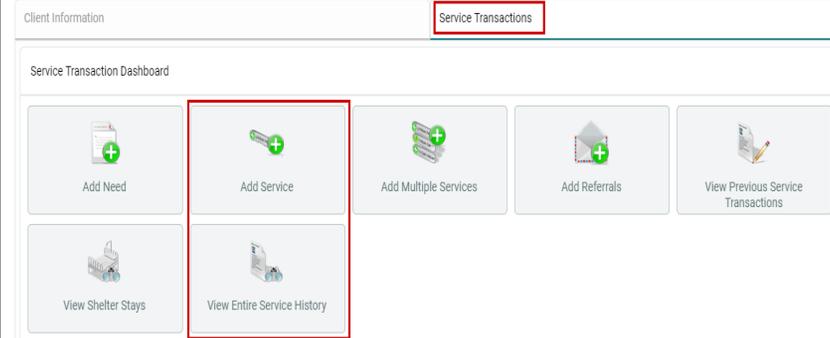
1. Creating a Transaction

- a. Select client profile.
 - If transaction involves multiple household members, use head of household's profile.
- b. Select "Service Transactions" tab.
- c. To review past transactions, select "View Entire Service History."
- d. Select "Add Service" to record a service.

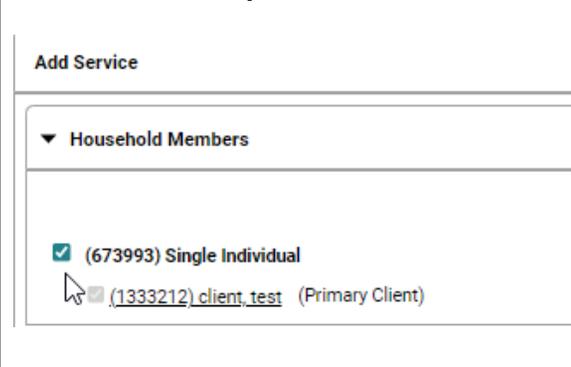
1.2 Select Participants

- a. The first page shows a list of all household members from the "Households" tab.
- b. Select appropriate client(s) included in transaction.
- c. If you have multiple clients on entry, the transaction should be created from the person marked as "Self" (head of household) on the entry.
 - This marks that person as the Primary Client.

1. Creating a Transaction



1.2 Select Participants



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1.3 Set Service Details

- a. Change "Service Provider" to your project's name (don't use your ADMIN provider).
- b. Select "Start Date" and "End Date" for service.
 - Dates should align with service provided.
 - For ongoing services (e.g. rent) set date to cover entire month paid.
 - "Start Date" must always be after client's entry date into system.
- c. Choose "Service Type."
- d. Proceed by selecting "Save & Continue."

1.4 Enter Service Information

- a. Enter any "Service Notes" required for chosen service type.

1.5 Complete "Service Costs" if Applicable

- a. Enter "Number of Units."
- b. Choose appropriate "Unit Type."
- c. Do not populate "Cost per Unit," or "Total Cost of Units."

1.3 Set Service Details

| | | | | |
|---------------------------|--|---------|-------------|-------|
| Service Provider* | Coordinated Housing Access (CoC) CE Clackamas (4433) | Search | My Provider | Clear |
| Creating User | Melanie Pascual | | | |
| Start Date* | 07 / 08 / 2024 | 3 | 54 | 38 PM |
| End Date | 07 / 08 / 2024 | 3 | 54 | 38 PM |
| Service Type* | Housing Related Coordinated Entry (BH-0500.3200) | Look Up | | |
| Provider Specific Service | -Select- | | | |

1.4 Enter Service Information

| | |
|---------------------------|--|
| Service Provider* | Coordinated Housing Access (CoC) CE Clackamas (4433) |
| Creating User | Melanie Pascual |
| Start Date* | 07 / 08 / 2024 |
| End Date | 07 / 08 / 2024 |
| Service Type* | Housing Related Coordinated Entry (BH-0500.3200) |
| Provider Specific Service | -Select- |
| Service Staff | -Select- |
| Service Notes | |

1.5 Complete Service Costs if Applicable

| | |
|---------------------|------------|
| Service Costs | |
| Number of Units | 1 |
| Unit Type | Phone Call |
| Cost per Unit | |
| Total Cost of Units | \$ |

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1.6 Apply Funding Details

- a. If billing a fund, expand “Apply Funds for Service” section.

1.6 Apply Funding Details

▼ **Apply Funds for Service**

Minimize Apply Funds for Service Panel

Vendor's Client Account Number

Name on Bill

Vendor

Code for Accounting Department

1.7 Add Funding Source

- a. Select “Search” to select a vendor if applicable.
 - i. Typically for rent or utilities.
- b. Select “Add Funding Source”
- c. In the pop-up, select a fund by selecting the green plus sign.
- d. Enter amount being billed to fund.
- e. Enter any applicable client co-pay.
- f. Fill out “Follow Up Information” if reminder if desired

1.7 Add Funding Source

Select Vendor

Vendor Search

Search for Vendors by using keywords for Vendor Name, Vendor ID, and Description.

Search

Show Matching Vendors ONLY

Vendor Search Results

| Vendor ID | Vendor Name | Address | Location | Distance |
|-----------|--------------------------------|---------|----------|----------|
| 33 | 60-Days Expired | Unknown | Unknown | N/A |
| 37 | Application Fee | Unknown | Unknown | N/A |
| 18 | Automotive Mechanic | Unknown | Unknown | N/A |
| 34 | City of Forest Grove Utilities | Unknown | Unknown | N/A |

1.8 Complete Transaction

- a. Choose “Need Status.”
- b. Choose “Outcome of Need”
- c. Select “Save & Exit.”

1.8 Complete Transaction

Need Information

Need Status *

Outcome of Need

If Need is Not Met, Reason

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2. Add Multiple Services

- a. In the "Services" tab, select "Add Multiple Services."

2.1 Select Clients

- a. Choose all clients involved in these transactions.
- b. Ensure each selected client is supposed to receive services being recorded.

2.2 Confirm Provider

- a. Verify correct Provider is selected before proceeding.

Note: Changing Provider after starting will cause you to lose all entered data.

2. Add Multiple Services

The screenshot shows the 'Service Transactions' interface. At the top, there is a 'Service Transactions' tab. Below it, there are three buttons: 'Add Service', 'Add Multiple Services' (highlighted with a red box), and 'View Entire Service History'. Under the 'Add Multiple Services' button, there is a section titled '2.1 Select Clients' with a dropdown menu for 'Household Members'. Below this, there is a list of clients with checkboxes: '(673993) Single Individual' (checked) and '(1333212) client_test' (checked). To the right of the list is an 'i To incl' icon. Below the client list, there is a section titled '2.2 Confirm Provider' with a dropdown menu for 'Multiple Services'. Below this, there is an 'i' icon and a message: 'Be sure to select the correct Provider before entering data'. Below the message, there is a 'Service Provider' dropdown menu with 'Coordinated Housing Access (CoC) CE Clackamas (4433)' selected.

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2.3 Record Services

- a. Your provider may automatically list specific services.
- b. Scroll through these and fill in details for each service as needed.
- c. "Number of Services" refers to how many transactions are being recorded (typically one per service). This is different from "Number of Units," which refers to the quantity of provided services.
- d. If a service was not provided, select "Remove" next to that service to delete it.
- e. You can adjust "Number of Services" and set the "Need Status" for all services at the top of service list.

2.4 Add Additional Services & Save

- a. If any required services are missing from the pre-populated list, add them by clicking "Add Another" at bottom of list.
- b. Once all services are correctly recorded, select "Save & Exit."

2.3 Record Services

Service List

| | |
|----------------------|--|
| Number of Services * | 5 |
| Start Date * | 07 / 08 / 2024 4 : 32 : 42 PM |
| End Date | 07 / 08 / 2024 4 : 32 : 42 PM |
| Service Type | Homelessness Prevention Programs (BH-0500.3140) |
| Moving On Assistance | Financial assistance for Moving On (e.g., security deposit, moving expenses) |

2.4 Add Additional Services & Save

Need Information

Need Status * Identified

Remove Clear

Add Another Remove All Clear All

Save & Exit Cancel

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3. Voiding a Transaction with Attached Funds

- a. Locate transaction you need to delete.
- b. Select pencil icon to edit.

3.1 Access Funding Sources & Voiding Transaction

- a. Scroll to “Funding Sources” section.
- b. You may need to expand “Apply Funds for Service.”
- c. Once finding the funding source that you desire to delete, select the triangle next to the fund.
- d. Select “Void” button that appears next to amount.

3.2 Completing the Void

- a. Choose appropriate “Reason for Void.”
- b. Select “Continue.”
- c. A strikethrough will appear through fund amount, indicating it has been voided.
- d. You may select “Add Funding Source” to add another fund amount if needed.

Save & Exit.

3. Voiding a Transaction with Attached Funds

3.2 Completing the Void

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4. Deleting a Transaction

- a. Transactions with a fund attach must be voided before deleted for all clients on transaction.
- b. View service history by navigating to client's profile and selecting "Entire Service History" tab.
- c. Locate desired transaction to delete.
- d. Select trash can next to "Need" to delete both "Need" and "Service."
- e. This deletes transaction for client whose profile you are on.
- f. Repeat process for every client listed on transaction.

4. Deleting a Transaction

The screenshot shows the 'Service Transactions' interface. At the top, there are tabs for 'Needs', 'Services', 'Referrals', and 'Shelter Stays'. The 'Entire Service History' tab is selected. Below the tabs, there is a search bar and a table of transactions. The table has columns for Transaction Type, Date, Provider, Type, Need Status / Outcome, and Need Goal. A 'Need' transaction is highlighted with a red box around its trash icon.

| Transaction Type | Date | Provider | Type | Need Status / Outcome | Need Goal |
|------------------|------------|--|-------------------------|-----------------------|-----------|
| Need | 08/14/2023 | 1st PLACE - At-Risk Families HP [EHA][HSC] | Rent Payment Assistance | Identified | |
| Service | 08/14/2023 | 1st PLACE - At-Risk Families HP [EHA][HSC] | Rent Payment Assistance | | |

3.0 Resources

3.1 Referenced Material

- [HHCC Health Housing Crosswalk](#)

3.2 Related Material

- [2024 HUD Data Manual](#)

3.3 Contacts

- HMISAdmin@clacmamas.us