Service Transactions in Wellsky HMIS

Create a Service Transaction **2**
a. One service for one client 2
b. Multiple services for one client 4
c. One or multiple services for multiple clients 5
Creating a Client List 5
Transacting one or multiple services for multiple clients 6
Edit a Service Transaction **8**
Delete a Service Transaction **10**

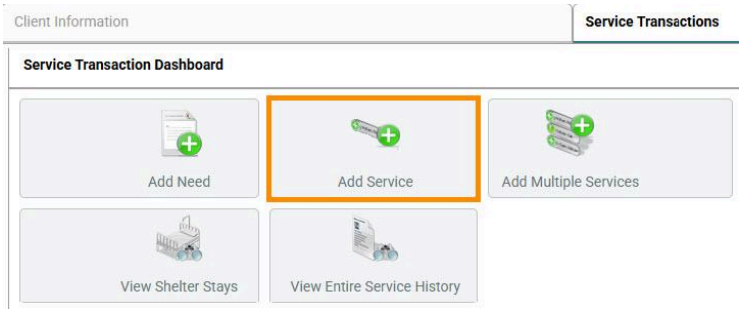
Service Transactions are only required for some programs, including but not limited to Multnomah County Homeless Services Department's *Housing Placement out of Shelter* (aka *In-Reach*) and *Street Outreach* programs and Oregon Housing and Community Services' *Homelessness Stabilization Division's RRH* programs. Please reach out to hmishelp@multco.us or your funding agency's Contract Manager to get more specific information on which services need to be entered into HMIS.

Create a Service Transaction

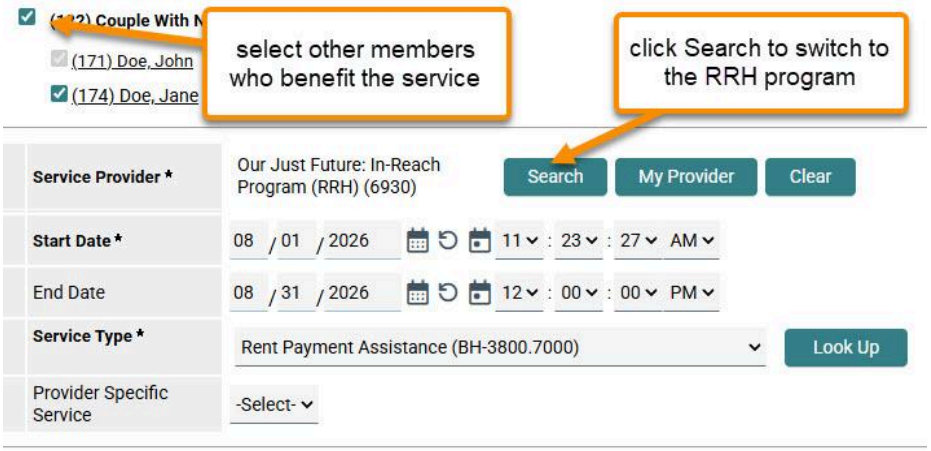
a. One service for one client

All transactions must be created from the profile of the person who is marked as Self (head of household) on the entry assessment. This will mark the head of household as the Primary Client on each transaction.

- Click **Service Transactions** on Client Profile page
- Click **Add Service**



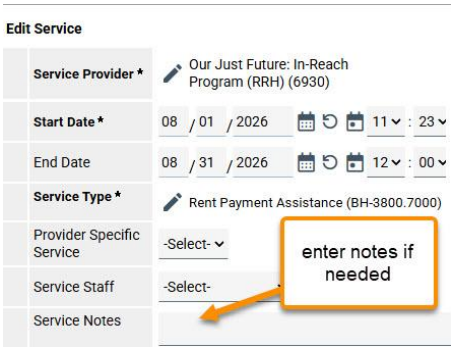
- Include all household members who have been enrolled in your entry/exit project on the service transaction by checking the box next to their name.
- The **Service Provider** must be the same as the Entry/Exit provider.



- Change the **Start Date** and **End Date** to reflect the beginning and end of the service.

Examples: A Rent Payment for August will have a start date of 08/01 and an end date of 8/31. A bus pass given on 2/24 will have start and end dates of 2/24.

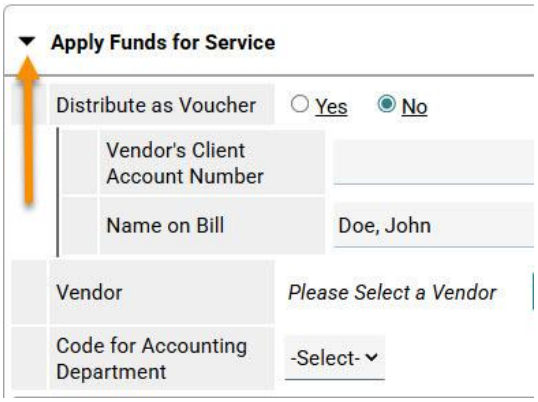
- Select a **Service Type**. Each Service Provider will have different Service Type options. If you believe the list of Service Types is inaccurate, please contact us.



- *Skip **Provider Specific** unless your organization has directed you otherwise.*
- Click **Save and Continue**.

- Under Edit Service, enter Service Notes if needed**.**

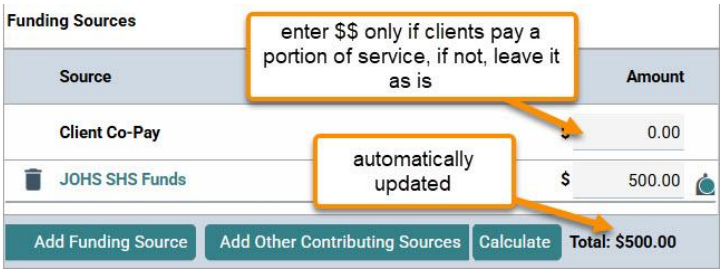
- If you need to track $$ with your service transactions, scroll down to the “Apply Funds for Service” section. Click the arrow to expand this section.





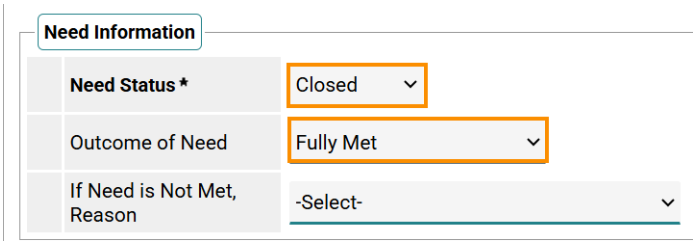
- Click **Add Funding Source**

- Under Fund Search Results, click the grey plus sign to select a fund source.
- Complete the **Amount** in the row you just added.
- Enter any additional Client Co-Pay $ amount in the row above. The Total will automatically calculate.



In the Need Information section:

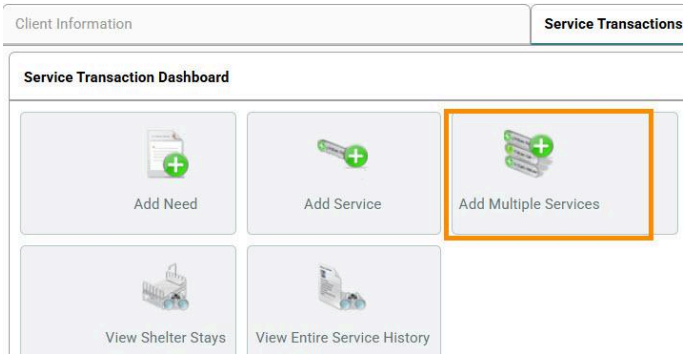
- **Need Status** to Closed
- **Outcome of Need** to Fully Met
- Click **Save & Exit** at the bottom of the page.



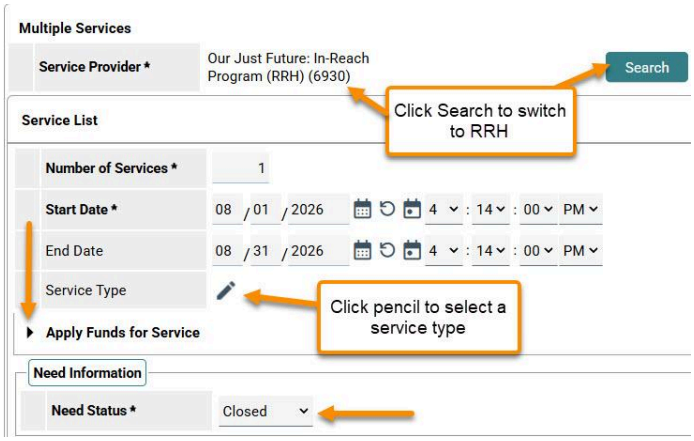
b. Multiple services for one client

Settings for this feature are configured specific to each program. Please contact us if you would like to use this feature and/or if your view looks different than what is presented here. All transactions must be created from the profile of the person who is marked as Self (head of household) on the entry assessment. This will mark the head of household as the Primary Client on each transaction.

- Click **Add Multiple Services**.
- Include all household members who have been enrolled in your entry/exit project on the service transaction.



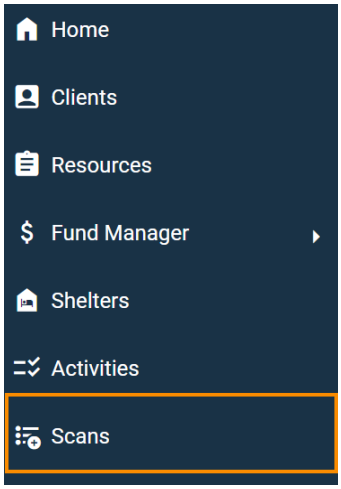
- Click **Search** to select the matching Entry/Exit provider.
- Edit the **Start Date** and **End Date**.
- Click the pencil next to Service Type to pick **Service Type**.
- Add the **Funding Source** and dollar amount if needed (more detailed steps on this on pages 19).
- Change **Need Status** to Closed.
- Click **Add Another**. That will produce a new set of the same questions to create another service.



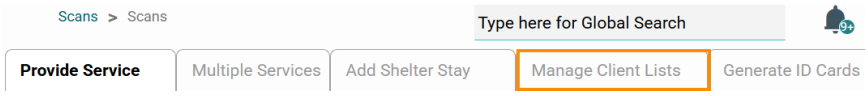
- Repeat until you've created all the service transactions for this participant.
- Click **Save and Exit**.

c. One or multiple services for multiple clients

Settings for this feature are configured specific to each program. Please reach out to hmishelp@multco.us if you would like to use this feature and/or if your view looks different than what is presented here.

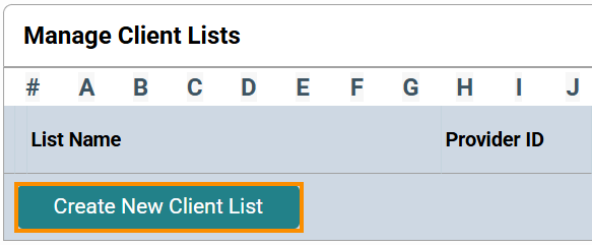


- Click on **Scans** in the left-hand navigational pane.
- Before creating any services for participants using this method, you must create a Client List. Click **Manage Client Lists**.

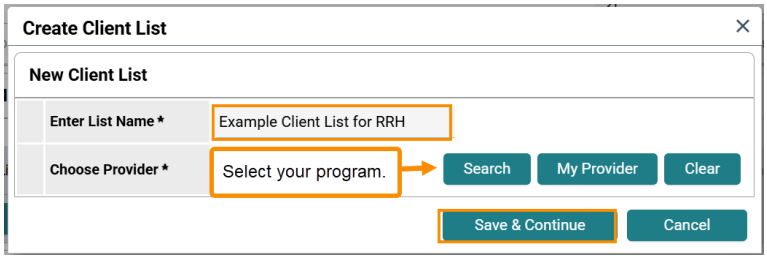


Creating a Client List

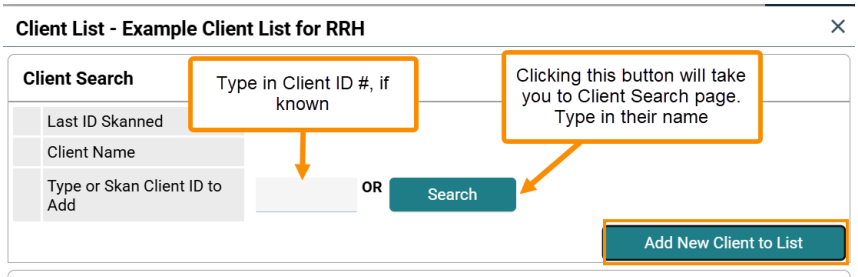
- Click **Create new Client List**



- Create a name for this Client List.
- Click **Search** to select the entry/exit provider.
- Click **Save & Continue**.



- Adding clients to the Client list occurs one client at a time. You can either type in their Client ID or search for them by name.



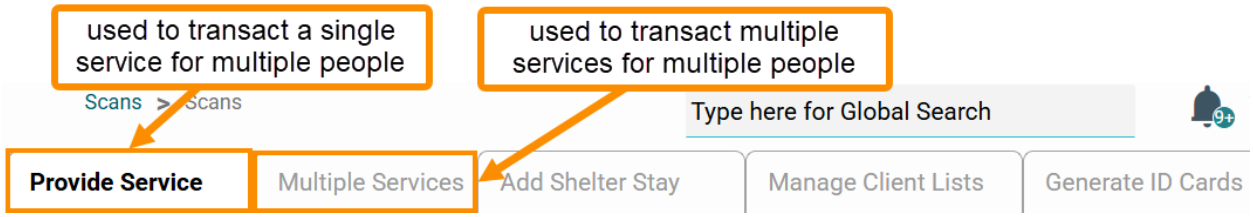
- Click **Add New Client to List** when you've found the person you're looking for.
- Complete that as many times as you need to to create a full list.
- Click **Exit**.



Transacting one or multiple services for multiple clients

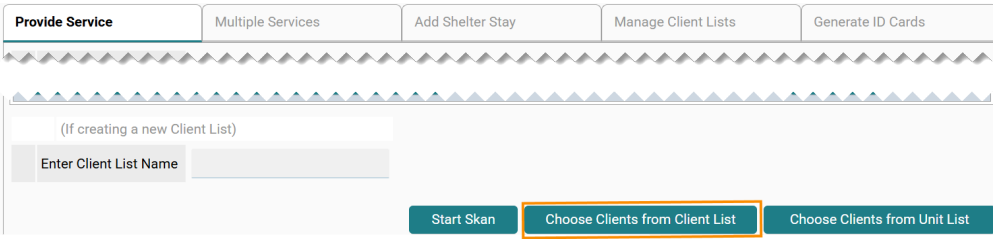
This step assumes that you have created a Client List and that the Client List contains every possible participant that you'd like to receive the service(s).

- Select either Provide Service or Multiple Services

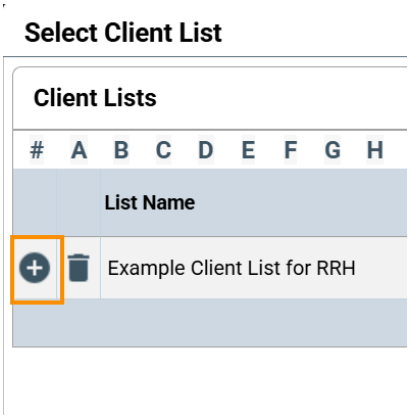


- Follow the prompts as described earlier in Service Transaction section to complete all required service transaction fields:
  - Service Provider
  - Start Date
  - End Date
  - Service Type
  - Need Status
  - Funding Source & $ Amount *(if required for your program)*

- Click **Choose Clients from Client List**



- Click the grey plus sign next to the Client List you'd like to pull from.

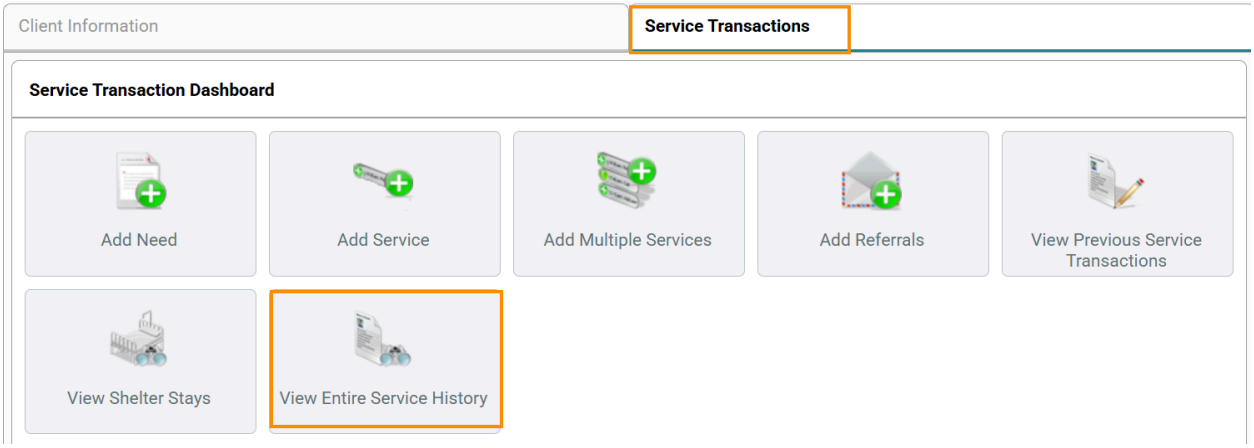




- Select one client at a time using checkboxes on the left, or select all by clicking **Check ALL Clients.** At any time you can unselect all clients you've already chosen by clicking **Clear ALL Clients**.
- Click **Enter Service for Clients** when you've selected all clients that have received the service(s).

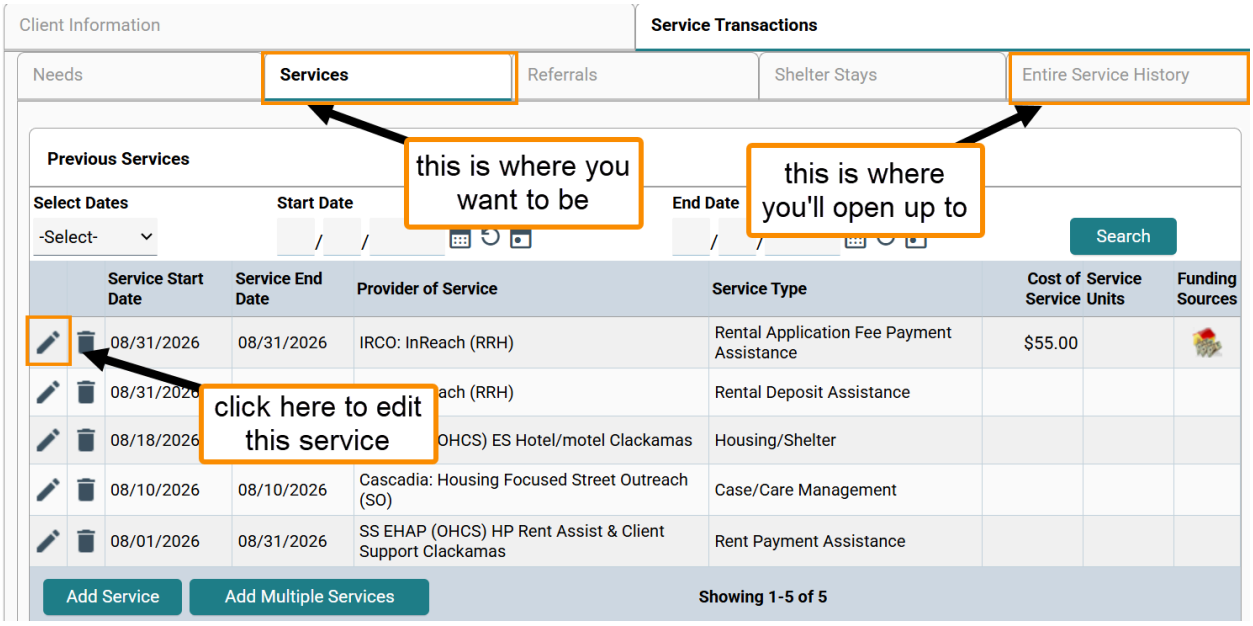
Edit a Service Transaction

- Open up the Client Profile and click into the Service Transactions tab.
- Click View Entire Service History.



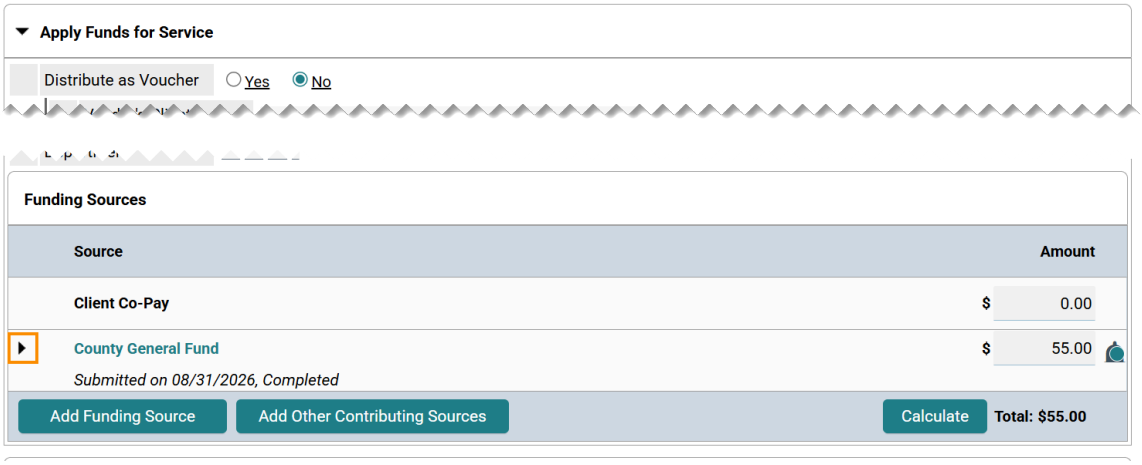
- Click on the Services tab.

- Click on the pencil icon to the left of the service you want to edit.

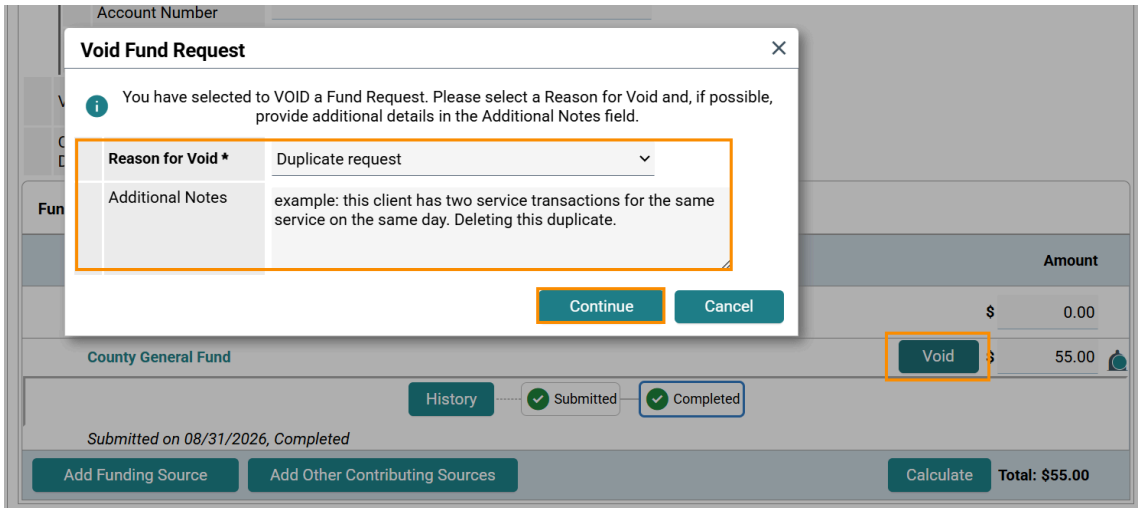


- This will open up the “Edit Service” screen. It’s the same screen used to fill in the details of the service when it was created. Any of the fields can be edited at this time.

- If you would like to change or remove the $$ in the Fund Source, click the right-facing arrow to open up the Fund Source line.

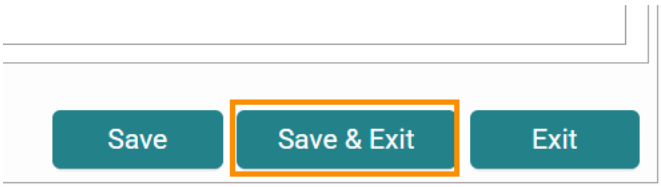


- To delete the $ amount altogether, click Void. Then, complete the following pop-up box with appropriate details.



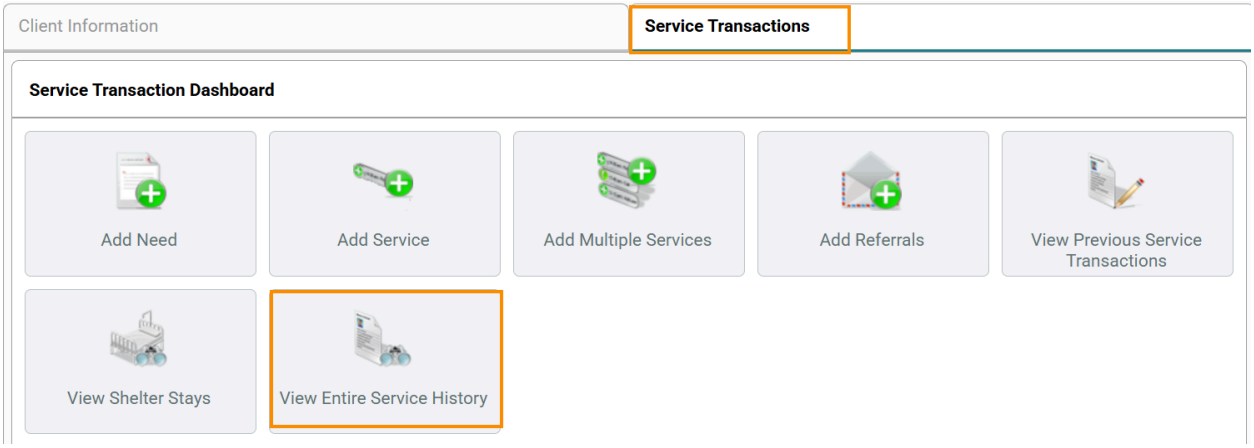
- To edit the $ amount, simply edit the value in the Amount field and it will automatically update.

- When all edits have been completed, scroll to the bottom of the page and click Save & Exit.



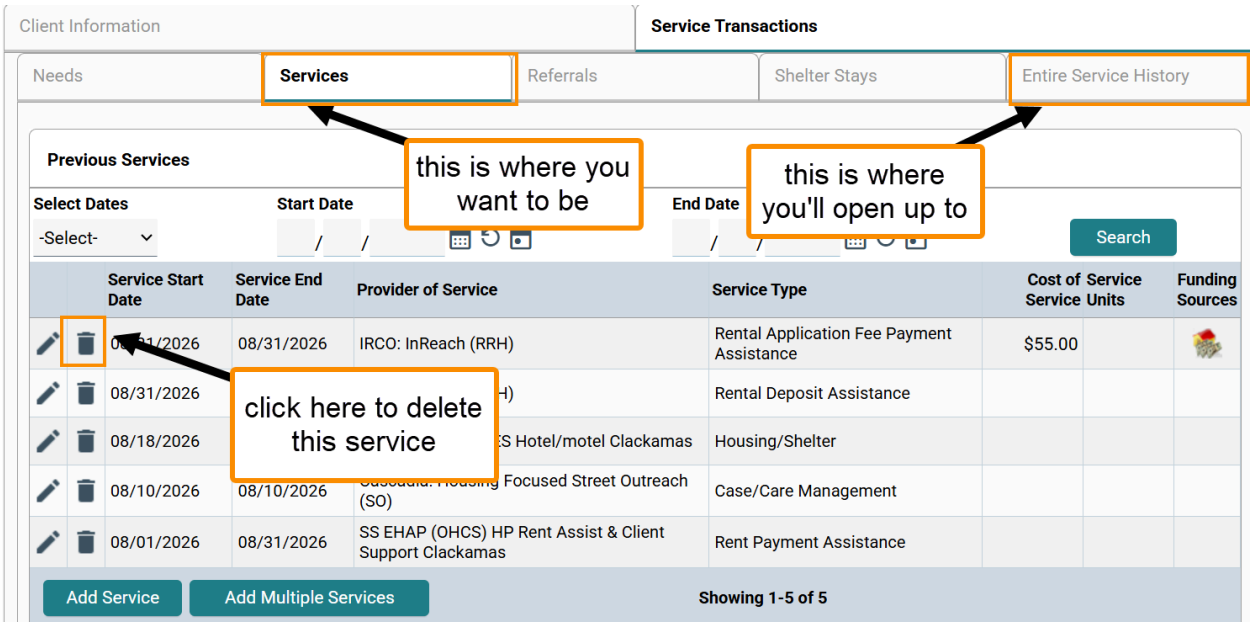
Delete a Service Transaction

- Open up the Client Profile and click into the Service Transactions tab.
- Click View Entire Service History.



- Click on the Services tab.

- Click on the bin icon to the left of the service you want to delete.



★ A service cannot be deleted if there is an active Fund Source with $ amount associated with it. You must Void the Fund Source (see prior section) first.