

# Service Transactions




**MUSKEGON COUNTY**  
Homeless Continuum  
of Care Network



# Service Transactions: What are they?

- Service Transactions are used in HMIS to track interactions and services provided to a client. Service Transactions must be recorded between the Entry and Exit Date for workflows using Entry and Exits.
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# Who should be entering Service Transactions?

- **Everyone!!(HMIS Users)** Entering a Service transaction proves that you provided a service to a client. It's like a receipt for your services! Or a way to track the progress of a client's hard work while enrolled in a program.
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# Service Transactions:

- Service Transactions can be added for just one individual within the household, assuming that certain members are being offered different services. Or can be added to an entire household at once!

▼ Household Members

 To include Household members for this Se


(38) Two Parent Family

(108) Bob, Billy (Primary Client)

(109) Bob, Kelly

(110) Bob, Little

▼ Household Members

 To include Household me

(38) Two Parent Family

(108) Bob, Billy (Primary Client)

(109) Bob, Kelly

(110) Bob, Little



# Service Transactions:

- At minimum, HMIS users should be entering at least **one service transaction per month** for the client. More than likely this minimum can be met by ensuring you are communicating with a client at least ONCE a month, a simple check-in.
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(38) Two Parent Family

(108) Bob, Billy (Primary Client)

(109) Bob, Kelly

(110) Bob, Little


<b>Service Provider *</b>	Region 4 Muskegon CoC (1349)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>						
Creating User	Diolinda Sali									
<b>Start Date *</b>	12 / 06 / 2024	<input type="button" value="Calendar"/>	<input type="button" value="Refresh"/>	<input type="button" value="Calendar"/>	10 ▾	:	23 ▾	:	39 ▾	AM ▾
End Date	12 / 06 / 2024	<input type="button" value="Calendar"/>	<input type="button" value="Refresh"/>	<input type="button" value="Calendar"/>	10 ▾	:	29 ▾	:	27 ▾	AM ▾
<b>Service Type *</b>	Case/Care Management (PH-1000) ▾		<input type="button" value="Look Up"/>							
Provider Specific Service	-Select- ▾									

- A "case/care management" service type is a perfect option for documenting your monthly contact with a client.
- NOTE: Make sure to end date these service types for the same day!

## Service Notes

Completed Monthly Check in Call

### Goals

	Classification	Type	Date Added	Date Set	Notes	Latest Note Date	
 	Communication	Maintain Ongoing Communication	12/06/2024	12/06/2024			

[Add Goal](#) Showing 1-1 of 1







### Client Notes

Provider	Note Date	Note Preview	Full Note
<a href="#">Add New Client Note</a> <a href="#">Print</a> <span>No matches.</span>			

- NOTE: In your Service Notes section, **keep it short!** If there is more detail that needs to be added, it is best to add that information in the **Case Plans section** and associate it with their specific goal.
- Or in the Client Notes section which can be found on the Client Profile.

# Service Transactions:

- There are several different options to choose from for Service types, from Rent Payments, Birth Certificates, Family Counseling services, and Household Goods, and many more! Utilize the **Look Up** button next to **Service Type** to explore your options!

Service Provider *	Region 4 Muskegon CoC (1349)	Search	My Provider	Clear		
Creating User	Diolinda Sali					
Start Date *	12 / 06 / 2024	  	11 ▾	: 15 ▾	: 18 ▾	AM ▾
End Date	12 / 06 / 2024	  	11 ▾	: 18 ▾	: 59 ▾	AM ▾
Service Type *	-Select- ▾	<b>Look Up</b>				
Provider Specific Service	-Select- ▾					





# Service Transactions: Permanent Supportive Housing

- In some cases, you may enter a service for a client for something like Financial Literacy Classes. You've set up your client and you will want to engage with that client to see how things are going. This would likely be a service transaction where you are **not going to immediately end-date** because the client has not fully completed the supportive service they were offered.
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# Service Transactions: Permanent Supportive Housing

- As the HMIS user, you and your client have identified the need for Financial Literacy Classes, and because the client hasn't yet finished their classes, you'll want to indicate that the need was partially met.

Need Information	
Need Status *	Identified <input type="button" value="v"/>
Outcome of Need	Partially Met <input type="button" value="v"/>
If Need is Not Met, Reason	-Select- <input type="button" value="v"/>



# Service Transactions

Any questions?

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Time for a demonstration!

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