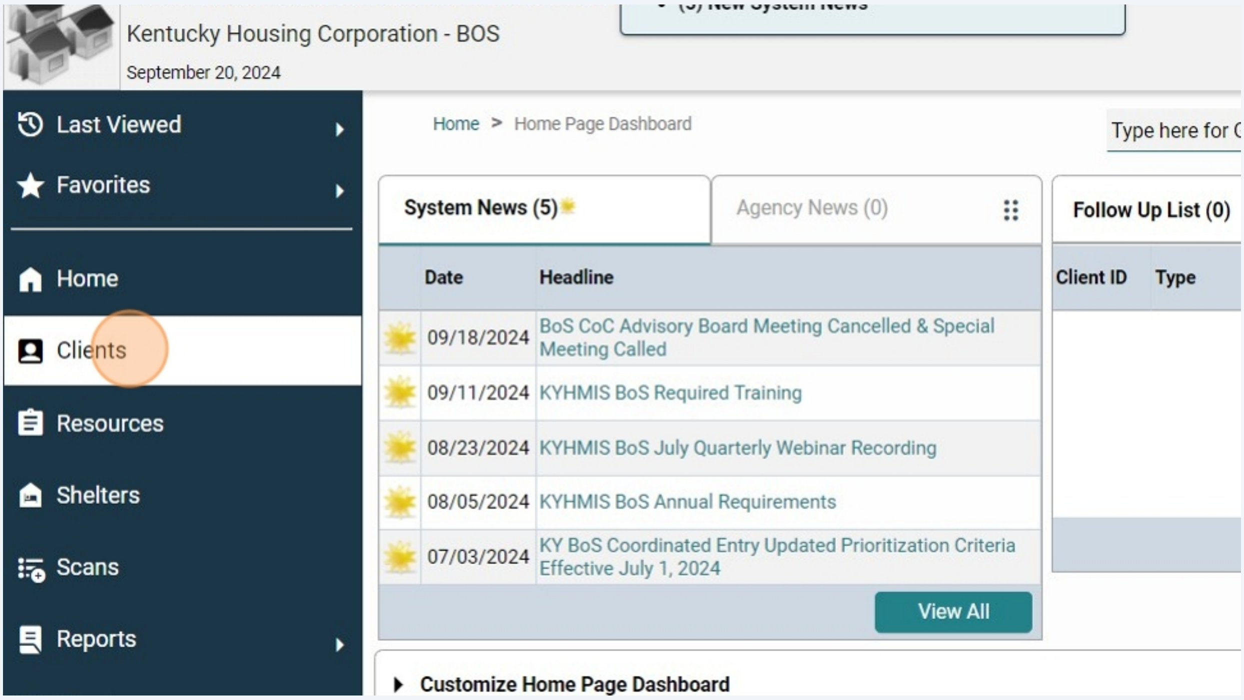
Service Transactions Workflow

Scribe

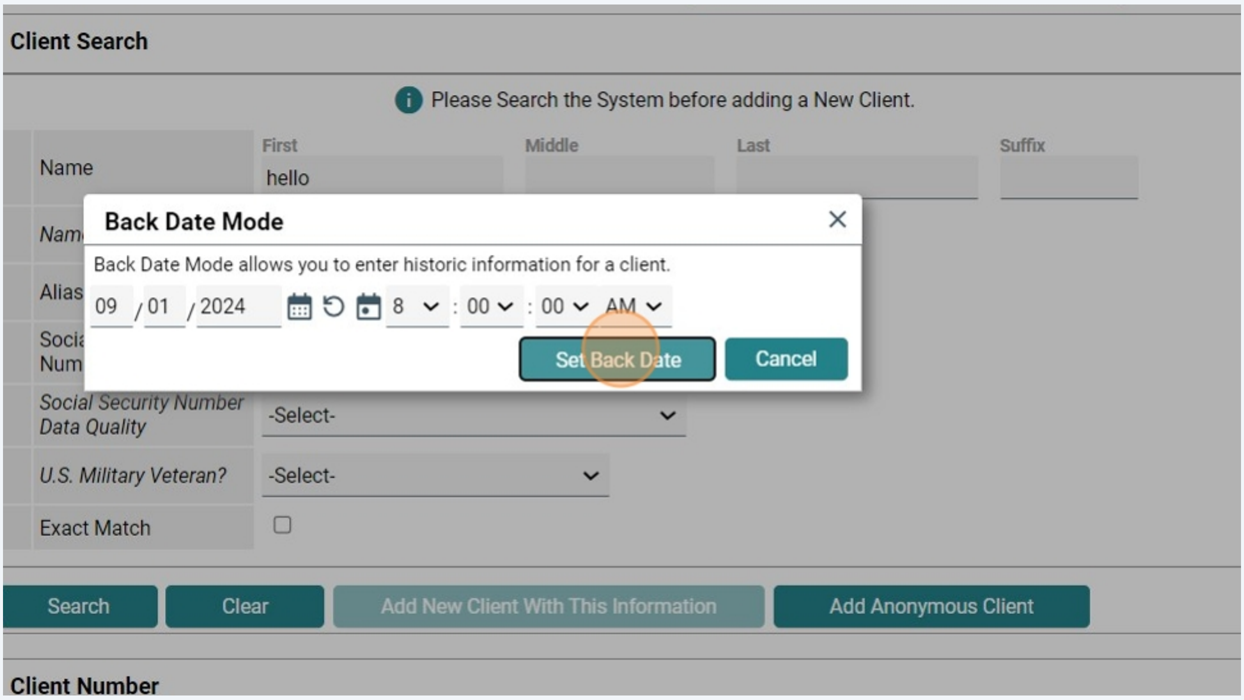
Workflow for recording Service Transactions in KYHMIS

1 Navigate to KYHMIS. https://wscs.wellsky.com/kyhomeless/com.bowmansystems.sp5.core.ServicePoint/index.html

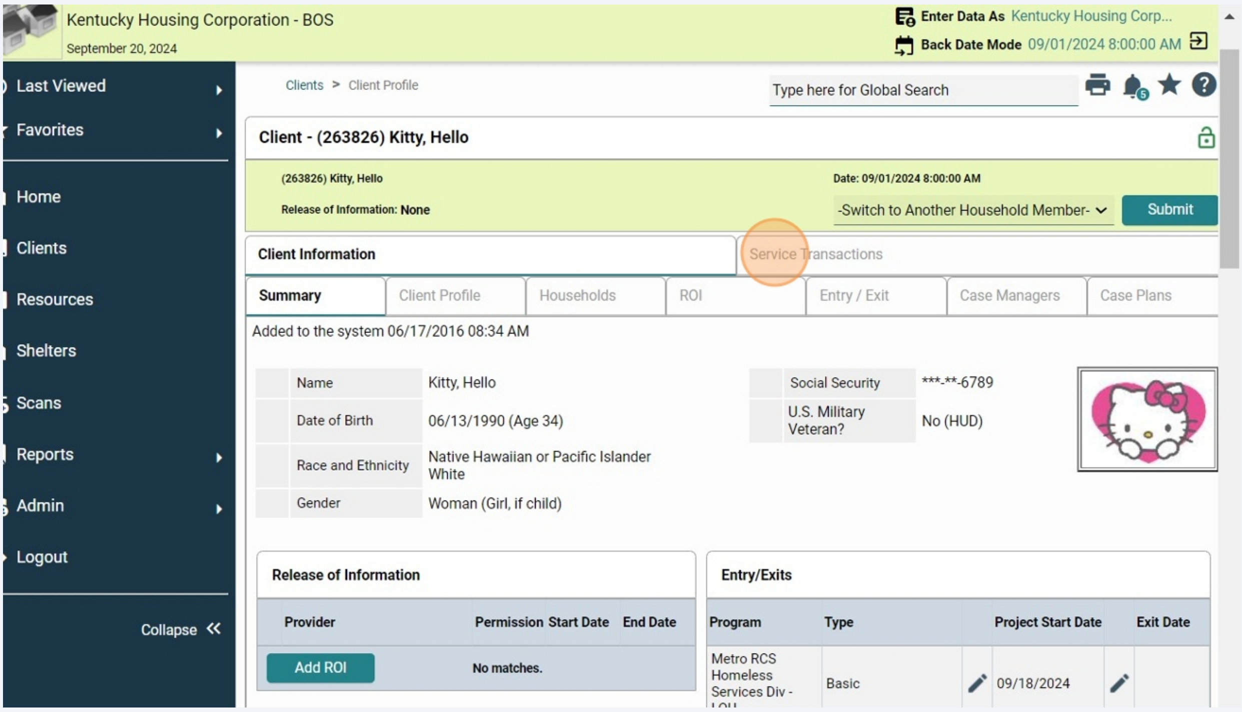
2 Click "Clients", and search for your Client Record.



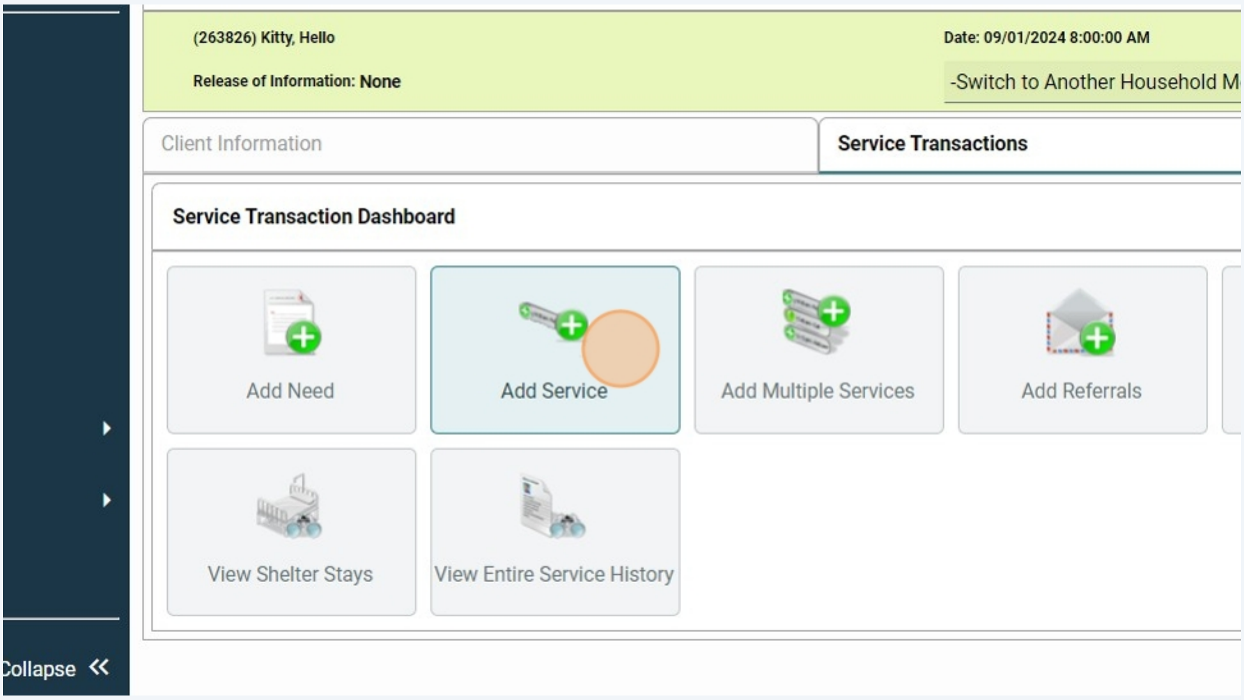
3 Click "Set Back Date" to set your Back Date to the date the Service Transaction happened.



4 Click the "Service Transactions" tab within the Client Record.



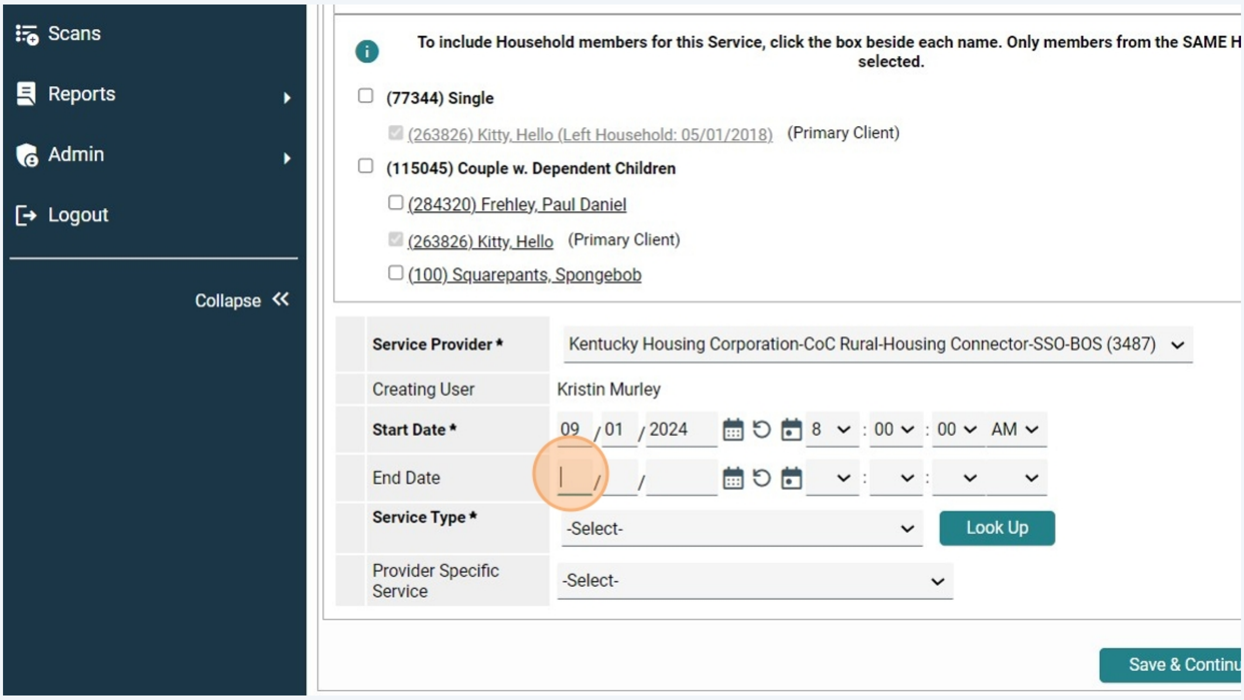
5 Click on the "Add Service" button.



Tip!

Use the Dashboard to quickly add Needs, Services, Referrals, or to view the client's historical service records.

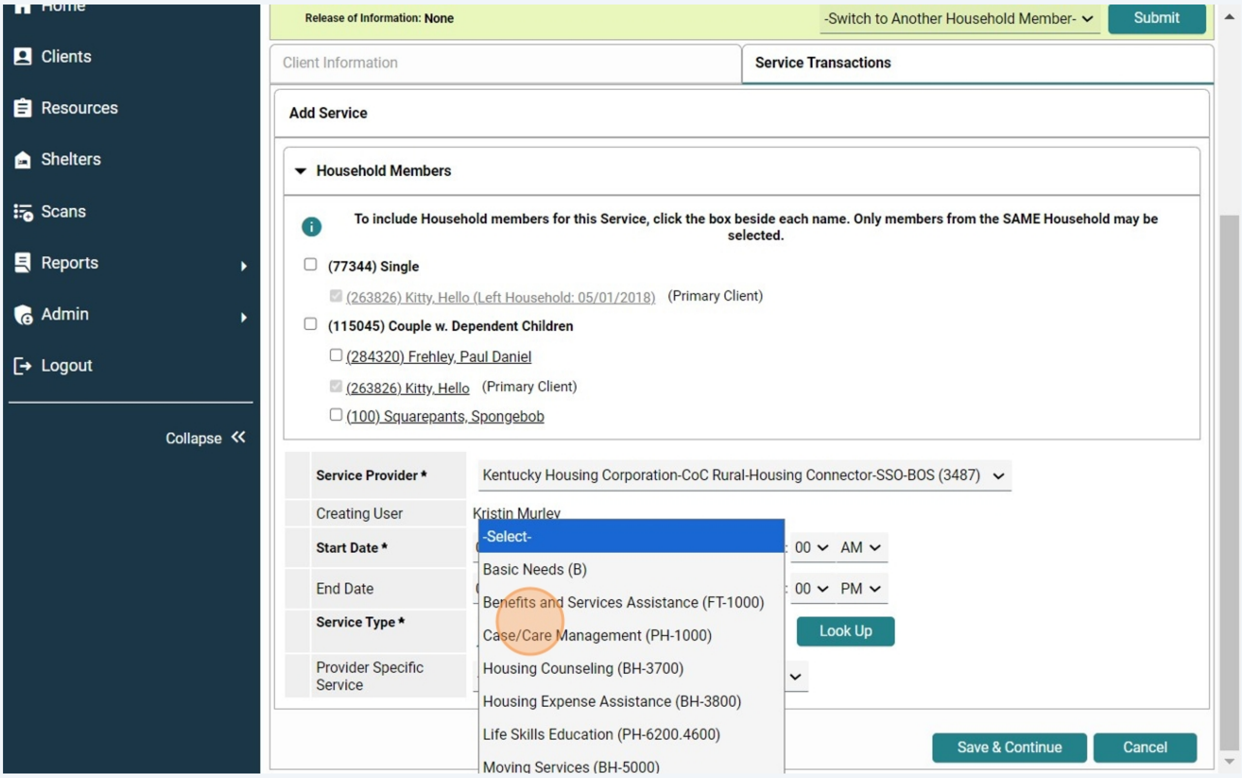
6 Next you will enter your Service Start & End Date(s).



7 Then you will select your "Service Type".

"Service Type" is the **general category** that the service you are providing falls under.

The "Service Type" list will be pre-populated for you, based on **funding type** & **project type**.



Alert!

***DO NOT** use the "Look Up" function. Use the pre-populated list.*

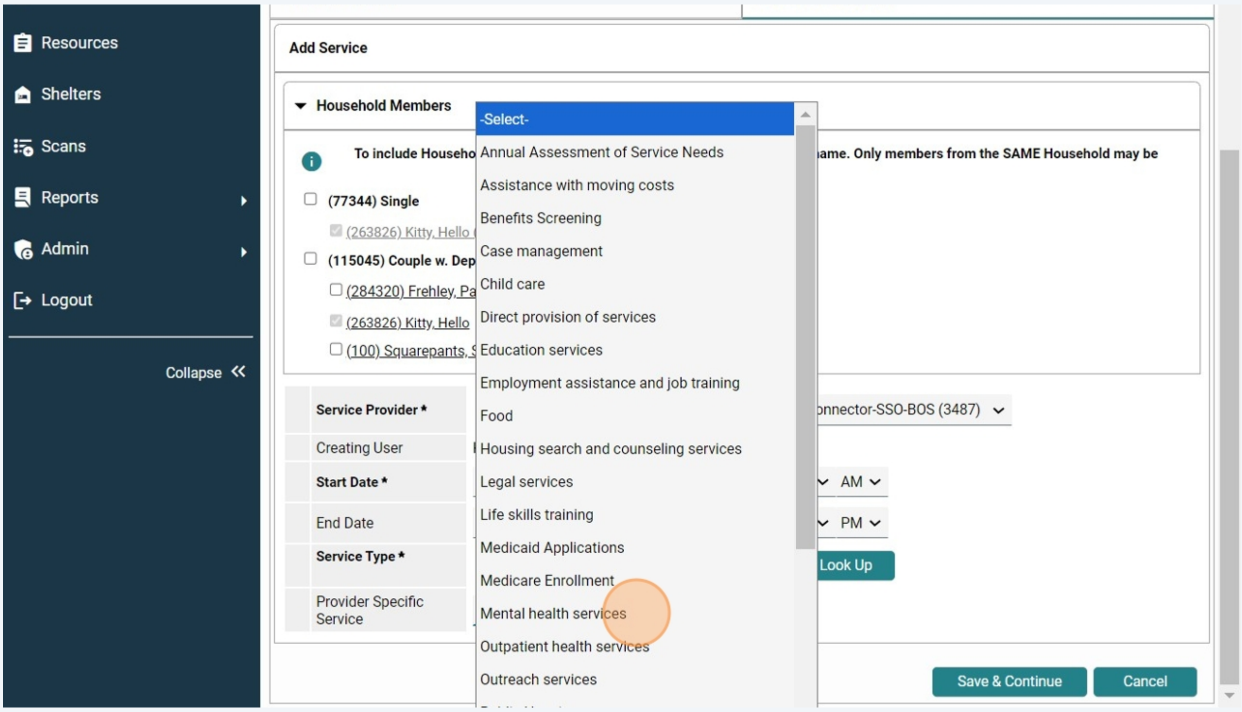
8

Next, select your "Provider Specific Service".

This is the specific service or activity that you are providing for the client(s).

The "Provider Specific Service" list will be pre-populated for you, based on **funding type** & **project type**.

Then click "Save & Continue".

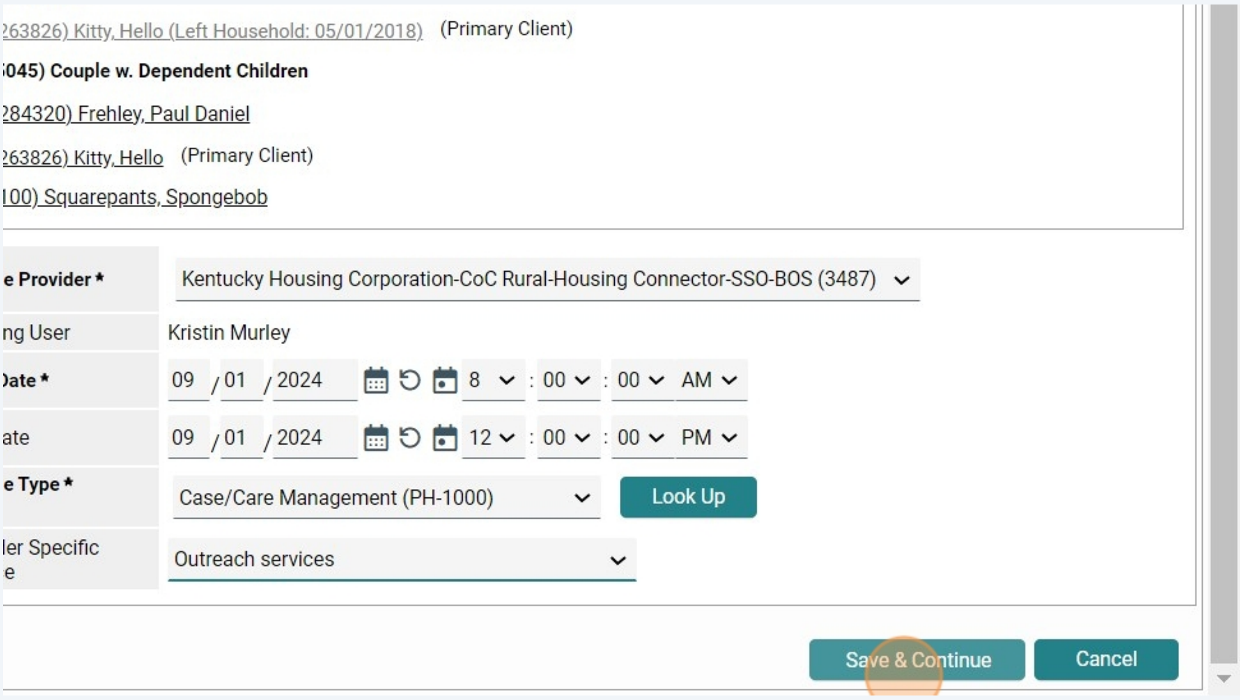


Alert!

*Use the **"Service Transaction Crosswalk"** on the HCA Partner Portal to assist you with quickly selecting your "Service Type" & "Provider-Specific Service".*

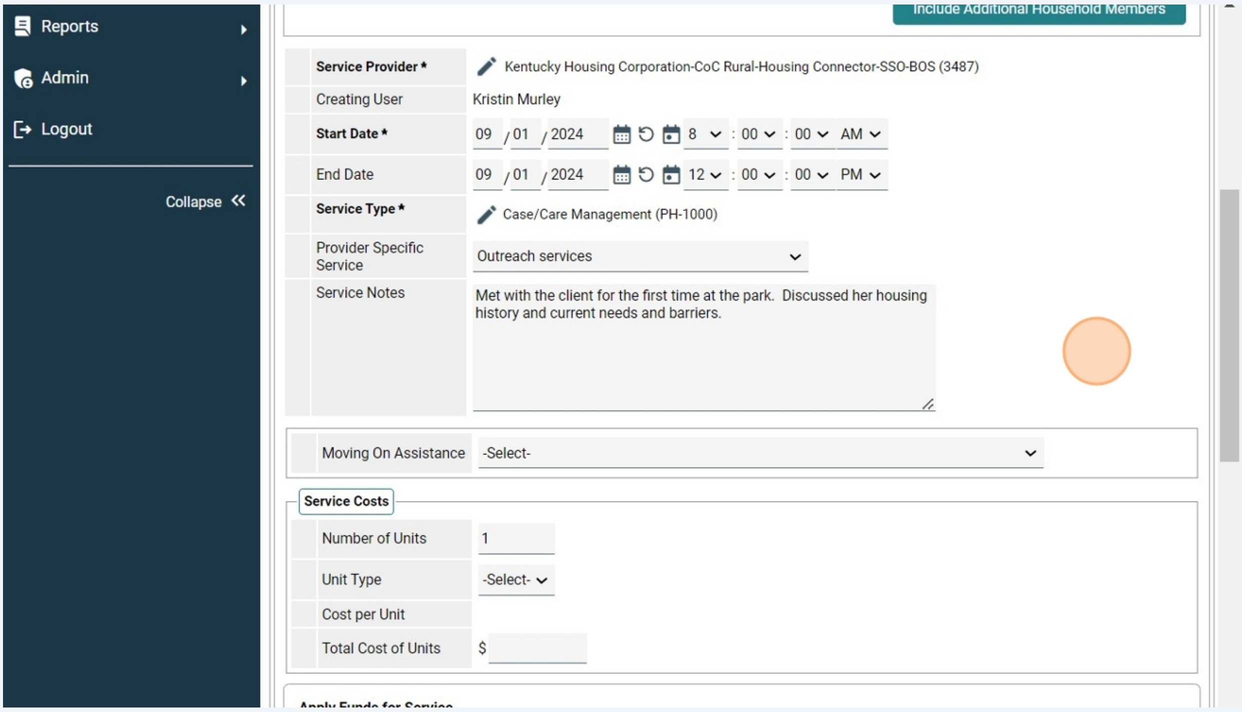
[Service Transaction and Case Notes - Intake Forms and Crosswalk - effective 10/1/24 – Housing Contract Administration Help Desk (zendesk.com/)]()

9 Click here.



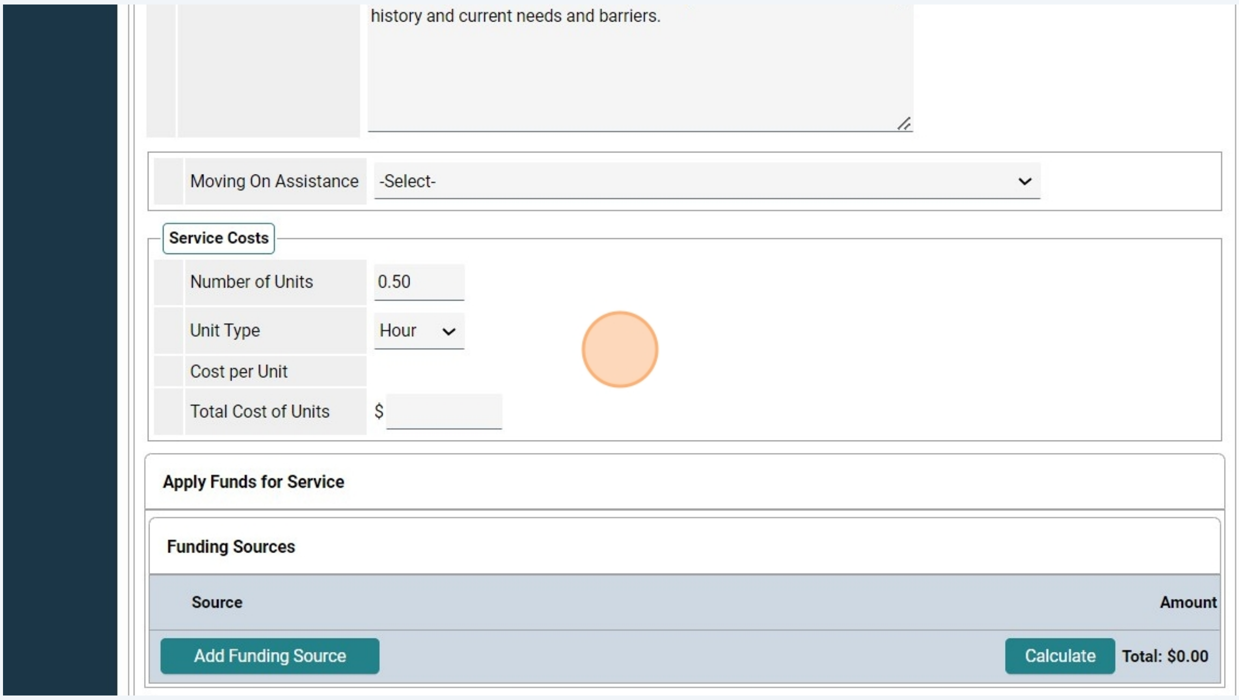
10 Next, fill in your "Service Notes".

This is a brief description of the service that you provided to the client(s).



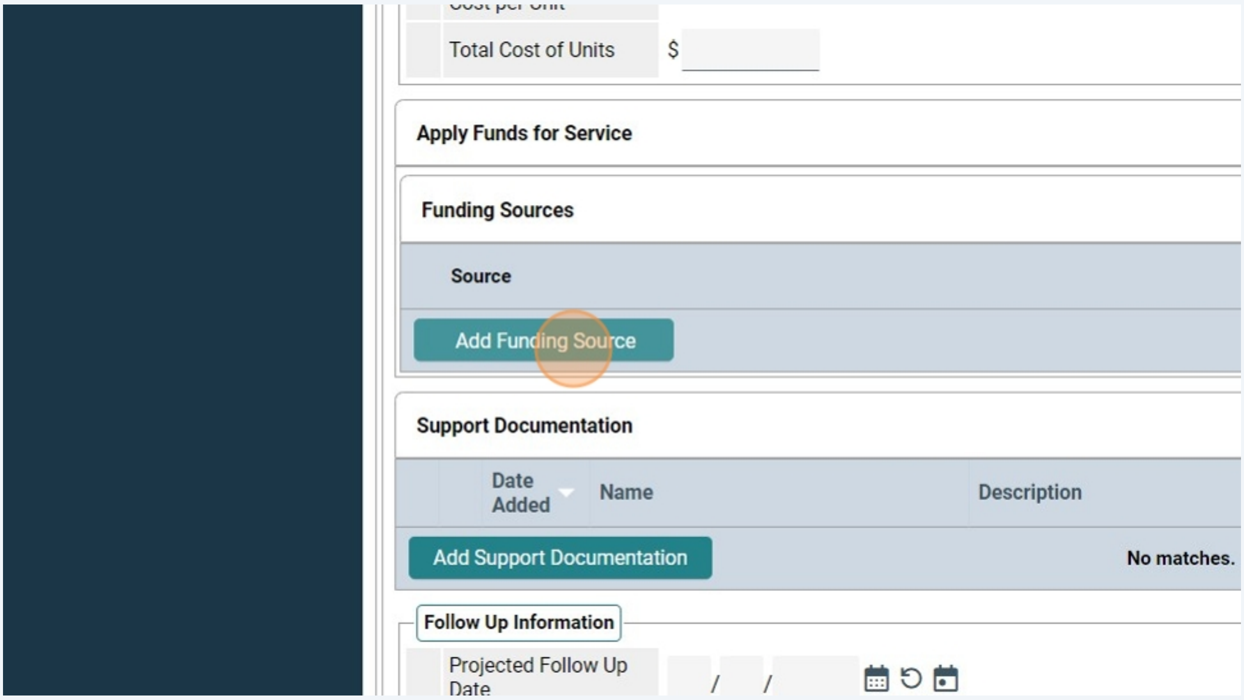
11 Next, enter your "Service Costs".

These can be tracked via Dollars, Hours, Days, Months & Weeks. You may or may not have an actual monetary cost to enter here.

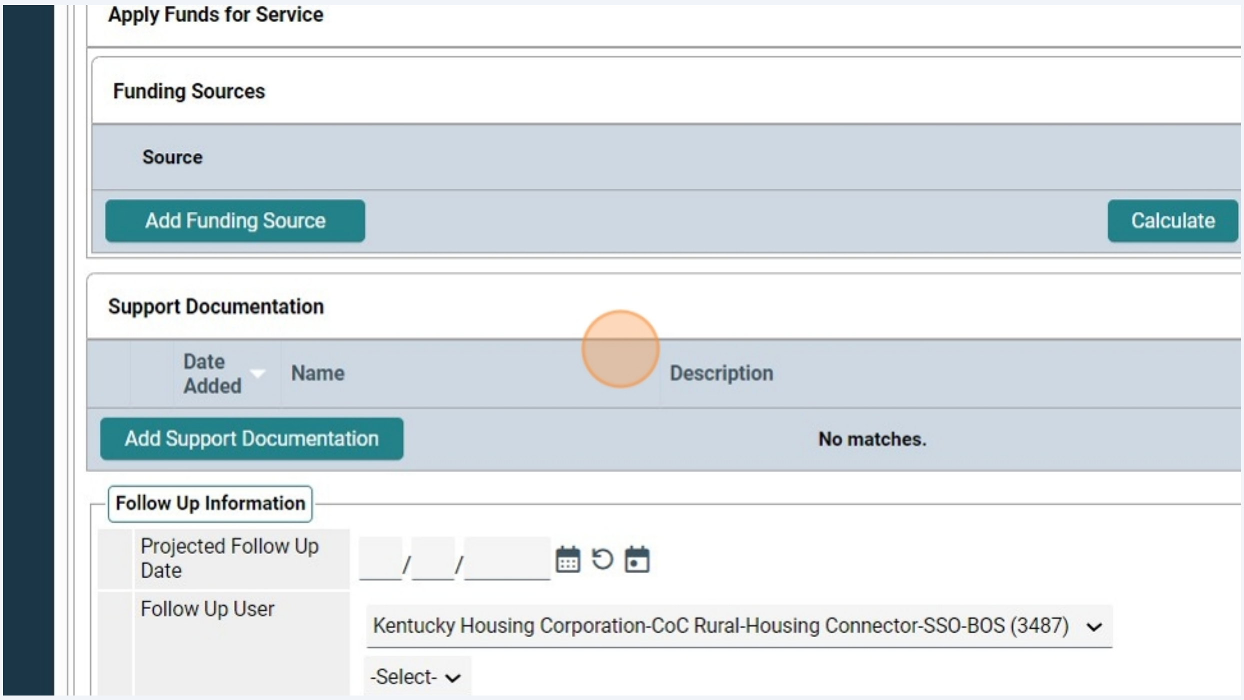


12 Next record your funding source by clicking "Add Funding Source".

Note- *this feature is only for service transactions with a monetary value attached. To use this feature you must enter a cost.*



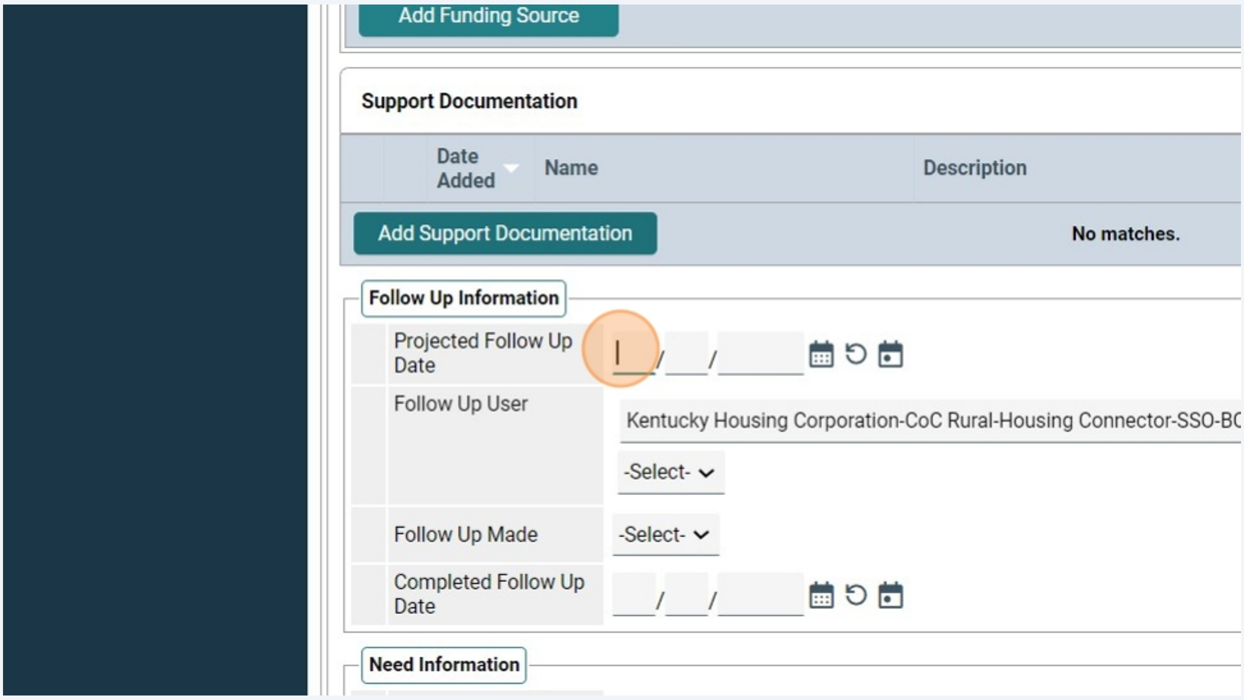
13 You can also click on "Add Support Documentation" to attach a copy of any documentation (ex: receipts, lease copy, invoice for moving services, etc.).



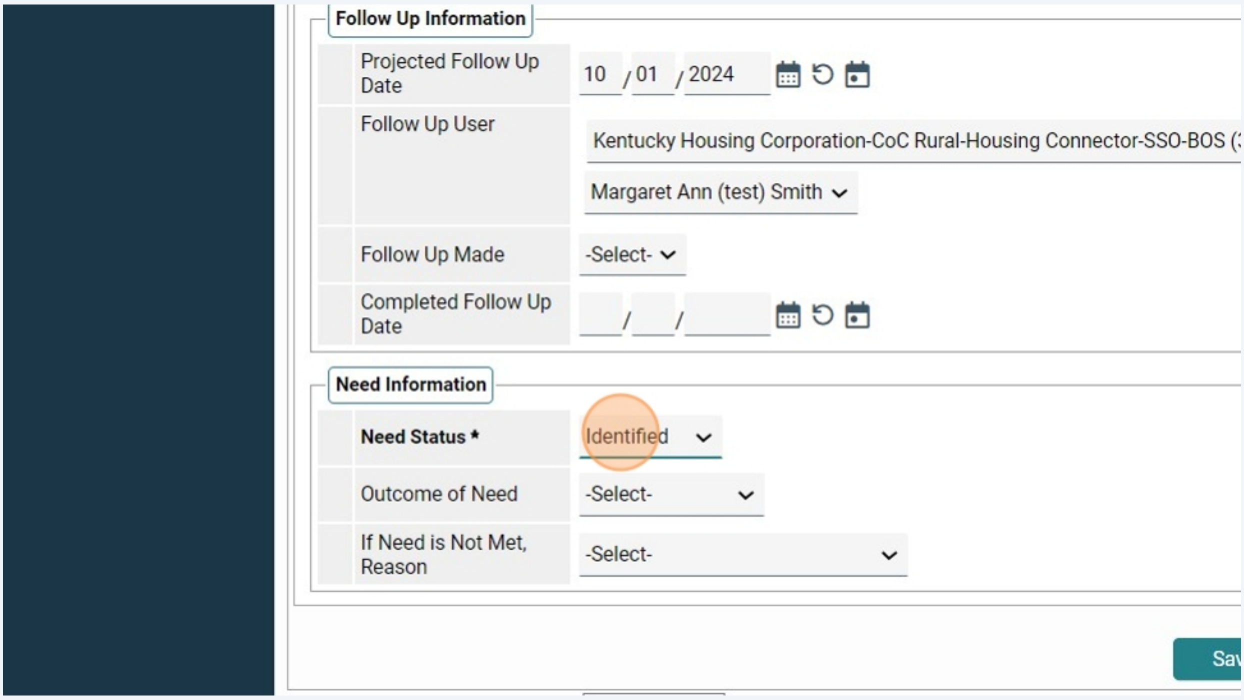
Tip!

Once the service is saved, different areas on the service screen are available to be completed. It depends on your agency's workflow which of these areas would need to be filled out.

14 Add "Follow Up Information" as necessary. This allows you to assign a user to follow up with this client, and a reminder can be added to your Dashlet when you login to KYHMIS.



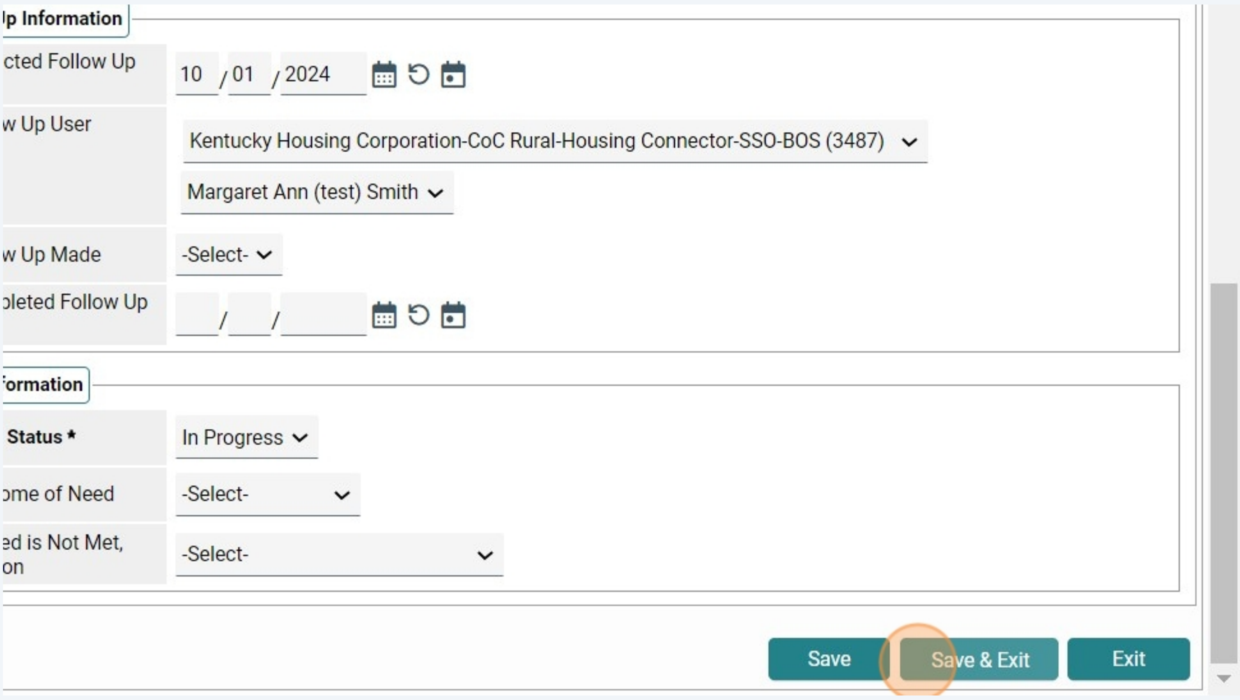
15 "Need Information" for this service will AUTOMATICALLY be identified. Use the drop-down menu next to "Need Status" to select the appropriate status.



16 Select "Outcome" of need if appropriate.

Select "Reason" if need not met as appropriate.

Click "Save & Exit".



Tip!

Click "Add Multiple Services" within the Service Transactions Dashboard.

*Select multiple services (**of the same service type**) at one time.*

17 Click on "View Entire Service History" from the Service Transactions Dashboard to see a history of the services to date that have been entered for the client.