

Service Transactions Workflow

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.

The screenshot shows the KYHMIS dashboard for the Kentucky Housing Corporation - BOS, dated September 20, 2024. The dashboard includes a navigation menu on the left with items: Last Viewed, Favorites, Home, Clients (highlighted with an orange circle), Resources, Shelters, Scans, and Reports. The main content area displays a 'Home Page Dashboard' with a search bar and several news sections: 'System News (5)', 'Agency News (0)', and 'Follow Up List (0)'. The 'System News' section contains a table with the following data:

Date	Headline
09/18/2024	BoS CoC Advisory Board Meeting Cancelled & Special Meeting Called
09/11/2024	KYHMIS BoS Required Training
08/23/2024	KYHMIS BoS July Quarterly Webinar Recording
08/05/2024	KYHMIS BoS Annual Requirements
07/03/2024	KY BoS Coordinated Entry Updated Prioritization Criteria Effective July 1, 2024

Below the news sections is a 'View All' button and a 'Customize Home Page Dashboard' link.

3

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

Client Search

Please Search the System before adding a New Client.

Name	First	Middle	Last	Suffix
	hello			

Back Date Mode

Back Date Mode allows you to enter historic information for a client.

09 / 01 / 2024 8 : 00 : 00 AM

Set Back Date **Cancel**

Social Security Number

Social Security Number Data Quality -Select-

U.S. Military Veteran? -Select-

Exact Match

Search **Clear** **Add New Client With This Information** **Add Anonymous Client**

Client Number

4

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

Kentucky Housing Corporation - BOS

September 20, 2024

Enter Data As Kentucky Housing Corp...

Back Date Mode 09/01/2024 8:00:00 AM

Clients > Client Profile

Type here for Global Search

Client - (263826) Kitty, Hello

(263826) Kitty, Hello Date: 09/01/2024 8:00:00 AM


Release of Information: None -Switch to Another Household Member- **Submit**

Client Information **Service Transactions**

Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans
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Added to the system 06/17/2016 08:34 AM

Name	Kitty, Hello	Social Security	***-**-6789
Date of Birth	06/13/1990 (Age 34)	U.S. Military Veteran?	No (HUD)
Race and Ethnicity	Native Hawaiian or Pacific Islander White		
Gender	Woman (Girl, if child)		



Release of Information			Entry/Exits			
Provider	Permission Start Date	End Date	Program	Type	Project Start Date	Exit Date
Add ROI	No matches.		Metro RCS Homeless Services Div -	Basic	09/18/2024	

5 Click on the "Add Service" button.

The screenshot shows a web application interface for a client named Kitty. At the top, there is a header bar with the client's name and phone number, the date and time, and a link to switch households. Below this is a navigation bar with 'Client Information' and 'Service Transactions' tabs. The main content area is titled 'Service Transaction Dashboard' and contains six buttons: 'Add Need', 'Add Service' (highlighted with a blue border), 'Add Multiple Services', 'Add Referrals', 'View Shelter Stays', and 'View Entire Service History'. A dark sidebar on the left has a 'Collapse' button with a double-left arrow.



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).

Scans

Reports

Admin

Logout

Collapse <<

i To include Household members for this Service, click the box beside each name. Only members from the SAME H selected.

(77344) Single

(263826) Kitty, Hello (Left Household: 05/01/2018) (Primary Client)

(115045) Couple w. Dependent Children



(284320) Frehley, Paul Daniel



(263826) Kitty, Hello (Primary Client)

(100) Squarepants, Spongebob

Service Provider * Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) ▾

Creating User Kristin Murley

Start Date * 09 / 01 / 2024   8 : 00 : 00 AM ▾

End Date   : : : ▾

Service Type * -Select- ▾ [Look Up](#)

Provider Specific Service -Select- ▾

Save & Continue

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**.

Release of Information: None -Switch to Another Household Member- Submit

Client Information Service Transactions

Add Service

Household Members

To include Household members for this Service, click the box beside each name. Only members from the SAME Household may be selected.

(77344) Single

(263826) Kitty_Hello (Left Household: 05/01/2018) (Primary Client)

(115045) Couple w. Dependent Children

(284320) Frehley_Paul Daniel

(263826) Kitty_Hello (Primary Client)

(100) Squarepants_Spongebob

Service Provider * Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) v

Creating User Kristin Murley

Start Date * -Select- 00 v AM v

End Date Basic Needs (B) 00 v PM v

Service Type * Case/Care Management (PH-1000) Look Up

Provider Specific Service Housing Counseling (BH-3700) v

Housing Expense Assistance (BH-3800)

Life Skills Education (PH-6200.4600)

Moving Services (BH-5000)

Save & Continue Cancel



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".

The screenshot shows the 'Add Service' form. The 'Household Members' section is expanded, showing a list of members with checkboxes and names. Below this is a 'Service Provider' dropdown menu. The 'Service Type' section is expanded, showing a list of services. A red circle highlights 'Mental health services' in the list. At the bottom of the form are 'Save & Continue' and 'Cancel' buttons.



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.

263826) Kitty, Hello (Left Household: 05/01/2018) (Primary Client)

045) Couple w. Dependent Children

284320) Frehley, Paul Daniel

263826) Kitty, Hello (Primary Client)

100) Squarepants, Spongebob

Service Provider *	Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) ▼
Creating User	Kristin Murley
Start Date *	09 / 01 / 2024 8 : 00 : 00 AM ▼
End Date	09 / 01 / 2024 12 : 00 : 00 PM ▼
Service Type *	Case/Care Management (PH-1000) ▼ Look Up
Provider Specific Service	Outreach services ▼

Save & Continue

Cancel

10 Next, fill in your "Service Notes".

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

Reports

Admin

Logout

Collapse <<

Service Provider *	Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487)
Creating User	Kristin Murley
Start Date *	09 / 01 / 2024 8 : 00 : 00 AM ▼
End Date	09 / 01 / 2024 12 : 00 : 00 PM ▼
Service Type *	Case/Care Management (PH-1000)
Provider Specific Service	Outreach services ▼
Service Notes	Met with the client for the first time at the park. Discussed her housing history and current needs and barriers.
Moving On Assistance	-Select- ▼
Service Costs	
Number of Units	1
Unit Type	-Select- ▼
Cost per Unit	
Total Cost of Units	\$

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.

history and current needs and barriers.

Moving On Assistance -Select-

Service Costs

Number of Units	0.50
Unit Type	Hour
Cost per Unit	
Total Cost of Units	\$

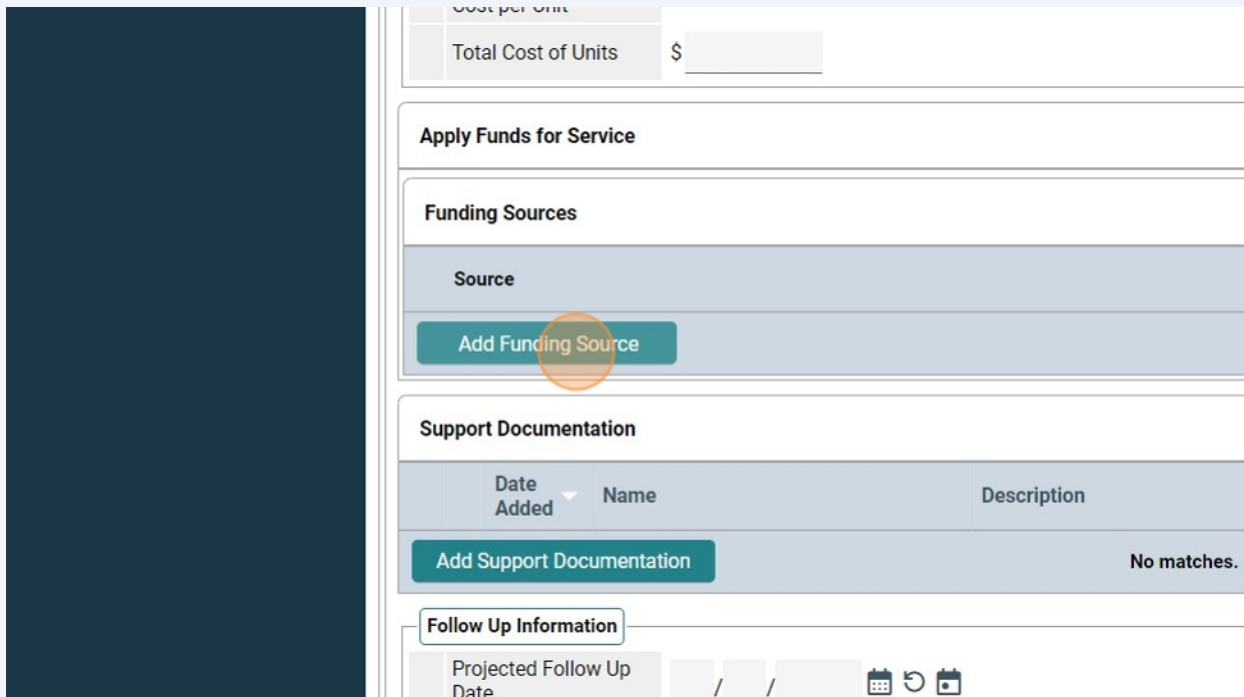
Apply Funds for Service

Funding Sources

Source	Amount
Add Funding Source	
Calculate Total: \$0.00	

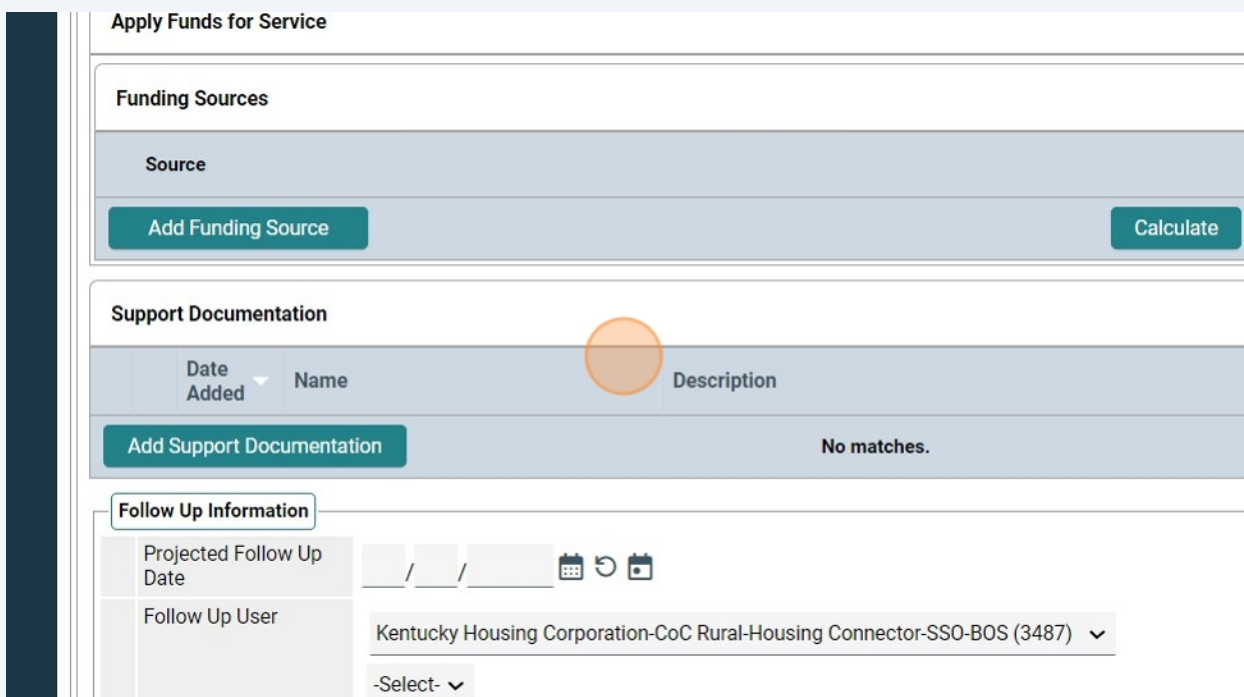
12 Next record your funding source by clicking "Add Funding Source".

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



The screenshot shows a web form titled "Apply Funds for Service". At the top, there is a field for "Total Cost of Units" with a dollar sign and an input box. Below this is a section titled "Funding Sources" with a "Source" label and a teal "Add Funding Source" button. An orange circle highlights this button. Underneath is a "Support Documentation" section with a table header containing "Date Added", "Name", and "Description". A teal "Add Support Documentation" button is on the left, and "No matches." is on the right. At the bottom is a "Follow Up Information" section with a "Projected Follow Up Date" field and a "Follow Up User" dropdown menu.

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.).



This screenshot shows the same "Apply Funds for Service" form. In this view, the "Add Support Documentation" button in the "Support Documentation" section is highlighted with an orange circle. The "Calculate" button is visible in the "Funding Sources" section. The "Follow Up Information" section shows the "Projected Follow Up Date" field with a date picker and the "Follow Up User" dropdown menu, which is currently set to "Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487)".



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.

The screenshot displays a web interface for managing service information. On the left is a dark blue sidebar. The main content area is divided into several sections:

- Add Funding Source**: A teal button at the top.
- Support Documentation**: A table with columns for 'Date Added', 'Name', and 'Description'. Below the table is a teal button labeled 'Add Support Documentation' and the text 'No matches.'
- Follow Up Information**: A section with several fields:
 - Projected Follow Up Date**: A date input field with a calendar icon and a refresh icon. This field is highlighted with an orange circle.
 - Follow Up User**: A dropdown menu with the selected value 'Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BC' and a '-Select-' option.
 - Follow Up Made**: A dropdown menu with a '-Select-' option.
 - Completed Follow Up Date**: A date input field with a calendar icon and a refresh icon.
- Need Information**: A section at the bottom.

15

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

The screenshot shows a web form with two main sections: "Follow Up Information" and "Need Information".

Follow Up Information:

- Projected Follow Up Date: 10 / 01 / 2024
- Follow Up User: Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) Margaret Ann (test) Smith
- Follow Up Made: -Select-
- Completed Follow Up Date: [] / [] / []

Need Information:

- Need Status *: Identified (highlighted with an orange circle)
- Outcome of Need: -Select-
- If Need is Not Met, Reason: -Select-

A "Save" button is visible in the bottom right corner.

16

Select "Outcome" of need if appropriate.

Select "Reason" if need not met as appropriate.

Click "Save & Exit".

The screenshot shows a web form with two main sections: "Follow Up Information" and "Need Information".

Follow Up Information:

- Projected Follow Up Date: 10 / 01 / 2024
- Follow Up User: Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) Margaret Ann (test) Smith
- Follow Up Made: -Select-
- Completed Follow Up Date: [] / [] / []

Need Information:

- Status *: In Progress
- Outcome of Need: -Select-
- If Need is Not Met, Reason: -Select-

At the bottom right, there are three buttons: "Save", "Save & Exit" (highlighted with an orange circle), and "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.

Release of Information: None -Switch to Another Household M

Client Information Service Transactions

Service Transaction Dashboard

Add Need Add Service Add Multiple Services Add Referrals

View Shelter Stays **View Entire Service History**

Collapse <<