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.

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.

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

ⓘ **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 «

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 & Continu

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.

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

045) Couple w. Dependent Children

284320) Frehley, Paul Daniel

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e Provider *	Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) ⌄
ng User	Kristin Murley
ate *	09 / 01 / 2024 📅 ↺ 📅 8 ⌄ : 00 ⌄ : 00 ⌄ AM ⌄
ate	09 / 01 / 2024 📅 ↺ 📅 12 ⌄ : 00 ⌄ : 00 ⌄ PM ⌄
e Type *	Case/Care Management (PH-1000) ⌄ **Look Up**
er Specific e	Outreach services ⌄

Save & Continue   **Cancel**

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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 « |

Include Additional Household Members

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	$

Apply Funds for Service

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	$
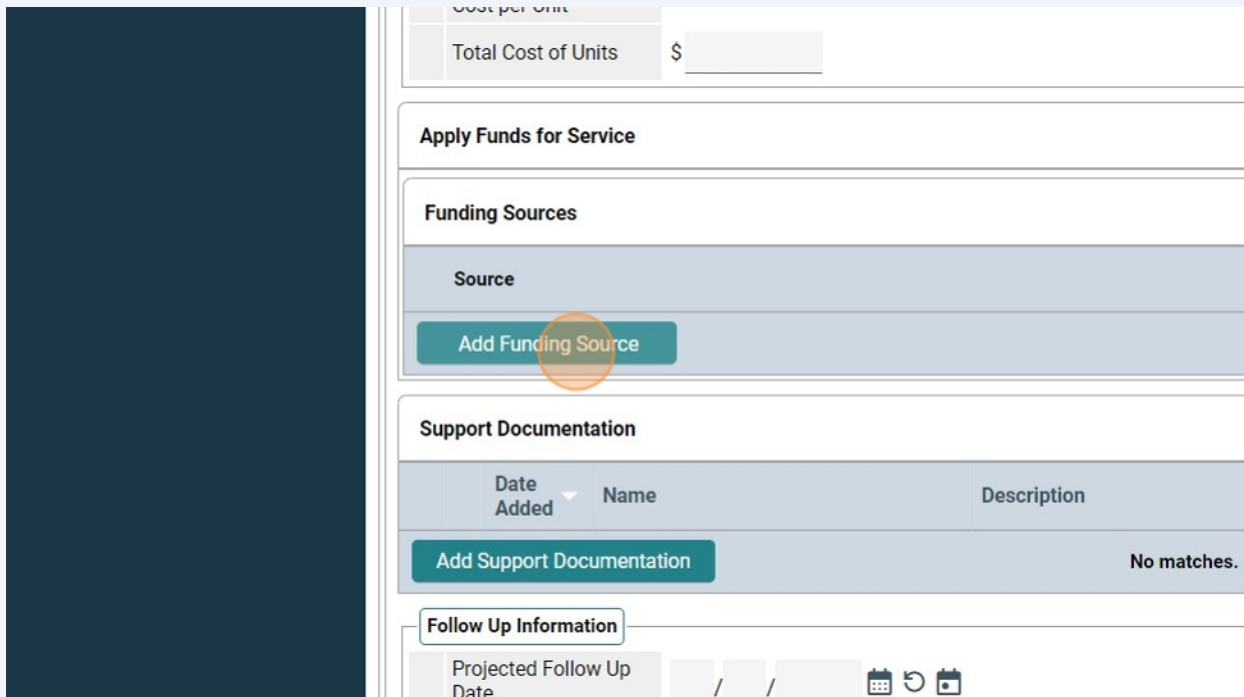
Apply Funds for Service

Funding Sources

Source	Amount

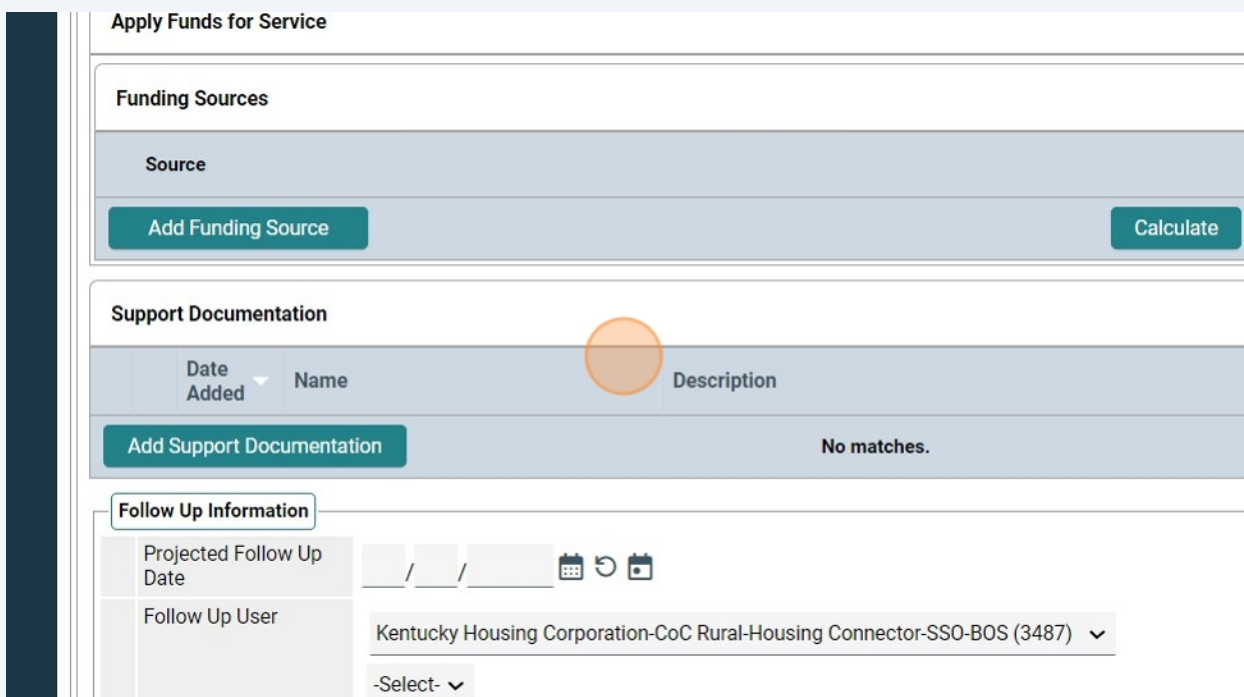Add Funding Source   Calculate   Total: $0.00

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.*

Total Cost of Units $

Apply Funds for Service

Funding Sources

Source

Add Funding Source

Support Documentation

Date Added	Name	Description
Add Support Documentation		No matches.

Follow Up Information

Projected Follow Up Date   /   /

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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.).

Apply Funds for Service

Funding Sources

Source

Add Funding Source   Calculate

Support Documentation

Date Added	Name	Description
Add Support Documentation		No matches.

Follow Up Information

Projected Follow Up Date   ____/____/____

Follow Up User   Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) ⌄

-Select- ⌄

> (i) **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.

Follow Up Information

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

Need Information

Need Status *	Identified ∨
Outcome of Need	-Select- ∨
If Need is Not Met, Reason	-Select- ∨

Sa

16 Select "Outcome" of need if appropriate.

Select "Reason" if need not met as appropriate.

Click "Save & Exit".

Up Information

cted Follow Up	10 / 01 / 2024
w Up User	Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) ∨
	Margaret Ann (test) Smith ∨
w Up Made	-Select- ∨
pleted Follow Up	/ /

formation

Status *	In Progress ∨
ome of Need	-Select- ∨
ed is Not Met, on	-Select- ∨

Save   Save & Exit   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.