

Service Transaction 101

Sal Muñoz

May 30, 2019

Service Transactions 101

- What are service transactions and why are they used?
 - AIRS Taxonomy
- Services Assigned to Projects
 - Reviewing your project's services
 - Form to adjust them
- SkanPoint
 - Documenting services en masse
 - Client lists and unit lists
- Reporting
- Questions

What are service transactions
and why are they used?

Service Transactions in HMIS

- Service transactions in HMIS are a way to track the services provided to clients
- These services operate on a transactional basis - every service documented fills in an identified need of that client
- Not every agency uses service transactions in HMIS in the same way
 - Depends on funding and project type

Service Transactions in HMIS

The services that are listed in HMIS come from the Alliance of Information and Referral Systems (AIRS) Taxonomy

From the AIRS Taxonomy website:

“The 211 LA County Taxonomy is the North American standard for indexing and accessing human services resource databases. The Taxonomy is a hierarchical system that contains more than 9,000 fully-defined terms that cover the complete range of human services. It serves as a common language that facilitates interoperability between different I&R resource databases”

Source: <https://www.airs.org/i4a/pages/index.cfm?pageid=3386>

Service Transactions in HMIS

Client - (1) Hoskins, Bob 🔍

(1) Hoskins, Bob
 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
Assessments

Added to the system 04/03/2019 06:04 PM

Name	Hoskins, Bob	Gender	Male	
Date of Birth	04/03/1966 (Age 53)	Primary Race	Asian (HUD)	
Social Security		Secondary Race		
		U.S. Military Veteran?		

Households				Entry/Exits			
ID	Type	Head of Household	Relationship	Program	Type	Project Start Date	Exit Date
1	Single Male	Yes	Self	Cornerstone Community Outreach - Sylvia Interim	HUD	05/29/2019	
	*Hoskins, Bob						
171	Single Male	Yes	Self	Cornerstone Community Outreach - Sylvia Interim	HUD	05/29/2019	
	Smith, Johnny						
	*Hoskins, Bob	No	Head of household's spouse or partner	All Chicago - Emergency Shelter	HUD	04/03/2017	

Add Entry / Exit Showing 1-3 of 3

Release of Information			Services		
Provider	Permission Start Date	End Date	Start Date	End Date	Provider
Add ROI No matches.			Add Service Add Multiple Services No matches.		

Outstanding Incoming Referrals **Outstanding Outgoing Referrals**

Service Transactions in HMIS

The Service Transaction screen the first time clicking on the tab.

The screenshot displays the 'Service Transaction Dashboard' for Client (1) Hoskins, Bob. The interface includes a header with the client name and a 'Submit' button. Below the header, there are two tabs: 'Client Information' and 'Service Transactions', with the latter being the active tab. The dashboard contains eight interactive tiles, each with an icon and a text label. The 'Add Service' tile is highlighted with a green border and a green plus sign icon. The other tiles are: 'Add Need' (document icon), 'Add Multiple Services' (stack of documents icon), 'Add Referrals' (envelope icon), 'Eligibility Search' (document with magnifying glass icon), 'View Previous Service Transactions' (document with pencil icon), 'View Shelter Stays' (shelter building icon), and 'View Entire Service History' (document with magnifying glass icon).

Client - (1) Hoskins, Bob

(1) Hoskins, Bob

Release of Information: **None**

-Switch to Another Household Member- ▾ Submit

Client Information Service Transactions

Service Transaction Dashboard

Add Need

Add Service

Add Multiple Services

Add Referrals

Eligibility Search

View Previous Service Transactions

View Shelter Stays

View Entire Service History

Service Transactions in HMIS

After adding a service or clicking “View Entire Service History”.

Client - (1) Hoskins, Bob 

(1) Hoskins, Bob
Release of Information: **None** -Switch to Another Household Member- ▼

Client Information **Service Transactions**

Needs Services Referrals Shelter Stays Entire Service History

Previous Services

Select Dates Start Date End Date

-Select- ▼ / /    / /   

	Service Start Date	Service End Date	Provider of Service	Service Provided
 	05/29/2019	05/29/2019	All Chicago - Emergency Shelter	Yes

Service Transactions in HMIS

- Service Provider: The project providing the service
- Start Date: Can be backdated to reflect the date a service was provided
- Service Type: Shows the services linked to that project
 - If you do not see a service provided, the “Look Up” button allows a user to find a service in the taxonomy

Service Provider *	All Chicago - Rapid Re-housing (RRH) (1155) ▼
Creating User	Sal Munoz
Start Date *	05 / 29 / 2019    9 ▼ : 38 ▼ : 28 ▼ PM ▼
End Date	05 / 29 / 2019    9 ▼ : 38 ▼ : 28 ▼ PM ▼
Service Type *	Rental Deposit Assistance (BH-3800.7250) ▼ <input type="button" value="Look Up"/>
Provider Specific Service	-Select- ▼

Service Transactions in HMIS

- The taxonomy works in a hierarchy
- Phrasing is important if you are trying to find something in the services provided
- If you are unsure what a term may represent, clicking “View” next to the term will populate the details section in the bottom right corner

Service Code Search

Search - Select a term that best describes the need.

Code Set: AIRS Taxonomy Search: Term [] Search

Beginning with Containing

Search Results		Selected Service Codes
	Code	Term
Select	View	B Basic Needs
Select	View	D Consumer Services
Select	View	F Criminal Justice and Legal Services
Select	View	H Education
Select	View	J Environment and Public Health/Safety
Select	View	L Health Care
Select	View	N Income Support and Employment
Select	View	P Individual and Family Life
Select	View	R Mental Health and Substance Use Disor
Select	View	T Organizational/Community/International Se

Showing 10 Service Codes

Selected Service Codes	
Code	Term
<Available>	

Details

Term	[]
Code	[]
Definition	[]
Facet	[]
Created	[]
Updated	[]
Use	[]
References	[]
See Also	[]
References	[]

Reset Search Form Clear All Selected Codes Submit Cancel

The structure of the services index and definitions of the terms contained herein were originally published in A Taxonomy of Human Services: A Conceptual Framework with Standardized Terminology and Definitions for the Field by the Information and Referral Federation of Los Angeles County, Inc., 326 W. Las Tunas Dr., San Gabriel, CA 91776; Copyright (c) 1983, 1987, 1991, 2001, 2002, 2003, 2004, 2005, 2006, 2007. No part of this listing of human services terms and definitions may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electrical, mechanical, photocopying, recording or otherwise without the prior written permission of the Information and Referral Federation of Los Angeles County, Inc.

Service Transactions in HMIS

1. Describes the project and the service provided
2. Apply “Funds for Service” is only applicable to projects that spend down from a fund (ie. State Homeless Prevention or Diversion)
 - a. Additionally, these projects will need to upload support documentation
3. Indicating the Need Status is critical
 - a. Use anything that does not have a prefix like CES or FHP

The screenshot shows the HMIS Service Provider form for 'All Chicago - Rapid Re-housing (RRH) (1155)'. The form is divided into several sections:

- Service Provider:** All Chicago - Rapid Re-housing (RRH) (1155)
- Creating User:** Sal Munoz
- Start Date:** 05/29/2019
- End Date:** 05/29/2019
- Service Type:** Rental Deposit Assistance (BH-3800.7250)
- Service Location:** -Select-
- Service Notes:** (Empty text area)
- HRRP Housing Relocation & Stabilization Service Provided (Retired):** -Select-
- HRRP Financial Assistance Type (Retired):** -Select-
- HRRP Financial Assistance Start Date (Retired):** []/[]/[]
- HRRP Financial Assistance End Date (Retired):** []/[]/[]
- Service Costs:**
 - Number of Units: []
 - Unit Type: -Select-
 - Cost per Unit: \$ []
 - Total Cost of Units: \$ []
- Apply Funds for Service:** (Highlighted with a red and green border)
- Conditional Commitments:**

Responsible Party	Condition	Due Date	Status
No matches.			
- Support Documentation:**

Date Added	Name	Description	Type
No matches.			
- Follow Up Information:**
 - Projected Follow Up Date: []/[]/[]
 - Follow Up User: All Chicago (1)
 - Follow Up Made: -Select-
 - Completed Follow Up Date: []/[]/[]
- Need Information:**
 - Need Status: Identified
 - Outcome of Need: -Select-

Services Assigned to Projects

Project Services

- Each individual project has its own defined set of services attached with it
 - The Services linked to “All Chicago - Outreach Project” will differ from the services offered by “All Chicago - Homelessness Prevention”

How to Review Your Project Services

Simply go to the Service Transaction Screen to review what each service looks like.

Let's take a look in the training site.

Changing Project's Services

If the services attached to your projects are not correct, or there are no services attached to your project, then you can submit a form and the HMIS team will input the appropriate services to the designated project:

<https://hmis.allchicago.org/hc/en-us/articles/360028632092-Service-Designation-Form>

SkanPoint

SkaniPoint

At times, you may need to document a service across multiple clients in your project.

Provide Service	Multiple Services	Add Shelter Stay	Manage Client Lists	Generate ID Cards
Service Provider *	 All Chicago - Outreach Project (1499)			
Service Type *	 Outreach Programs (TJ-6500.6300)			
Start Date *	05 / 29 / 2019    10 ▾ : 09 ▾ : 51 ▾ PM ▾			
End Date	/ /    ▾ : ▾ : ▾ ▾			
Provider Specific Service	-Select- ▾			

The best tool for this is SkanPoint. SkanPoint should be just above "Reports" in the navigation menu; if you do not see it, email HMIS@AllChicago.org.

SkanoPoint Tabs

- **Provide Service**
- **Multiple Services**
 - If you have provided multiple services to one client, you can list document all of those in one transaction
- **Add Shelter Stay**
 - Not necessary since ShelterPoint completes this function
- **Manage Client Lists**
 - This allows you to generate a list of clients that may have current entries or that interact frequently with your project
- **Generate ID Cards**

Let's Try SkanPoint Out

SkaniPoint

If you are interested in exploring how SkaniPoint can be used for your agency, please let the HMIS Team (HMIS@AllChicago.org) know and we can arrange to talk through how you can integrate it into your workflow (if you have never done so before).

Reporting

Reporting

Report Dashboard

Provider Reports

 Call Record Report	 Client Served Report	 CoC-APR 2018	 Daily Unit Report	 Entry/Exit Report
 ESG CAPER (HDS V1.3) 2018	 Fund Availability Report	 Needs Report	 PATH 2018	 Referrals
 Service Transaction				

Reporting

Report Options	
Provider *	All Chicago - Emergency Shelter (883) ▼
Provider Search Type *	The selected provider ONLY ▼
Services *	<input type="checkbox"/> Needs Entered by my provider <input type="checkbox"/> Services Provided by my provider (Non-shelter stays) <input type="checkbox"/> Shelter Stays provided by my provider <input type="checkbox"/> Needs Referred to my provider <input type="checkbox"/> Referrals Made by my provider
Service Code	<input type="button" value="Choose Service Code"/> <input type="button" value="Clear"/>
Need Date Range	<input type="text"/> / <input type="text"/> / <input type="text"/>    <input type="text"/> / <input type="text"/> / <input type="text"/>   
Service Provided Date Range	<input type="text"/> / <input type="text"/> / <input type="text"/>    <input type="text"/> / <input type="text"/> / <input type="text"/>   
Need Outcome	-All- ▼
<input type="button" value="Build Report"/> <input type="button" value="Download Results"/>	

Resources

Resources

- Service Designation Form:
 - <https://hmis.allchicago.org/hc/en-us/articles/360028632092-Service-Designation-Form>
- Data Entry, Best Practices and Running Reports:
 - <https://hmis.allchicago.org/hc/en-us/categories/115000933406-Data-Entry-Best-Practices-and-Running-Reports>
- HMIS ServicePoint Data Entry:
 - <https://hmis.allchicago.org/hc/en-us/sections/200368587-HMIS-ServicePoint-Data-Entry>
- Service Transaction Training Snippets:
 - <https://hmis.allchicago.org/hc/en-us/articles/360024992951-Service-Transaction-Training-Snippets>

Questions?

- Email:
 - HMIS@AllChicago.org
 - Smunoz@allchicago.org