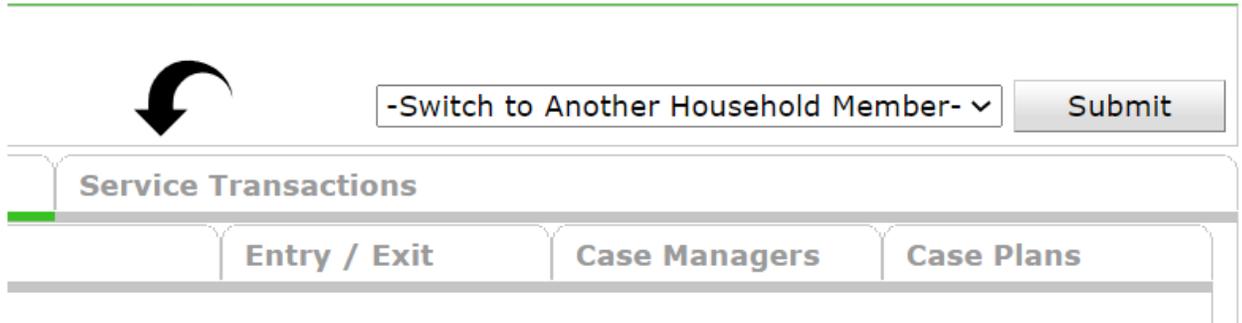


Service Transactions Guide

Purpose: This guide indicates how to record service transactions in HMIS including Bus Passes.

1. After logging into HMIS> Click on the Client Point tab> Search for the client's name that you are entering the service for> Click on the Service Transactions tab.

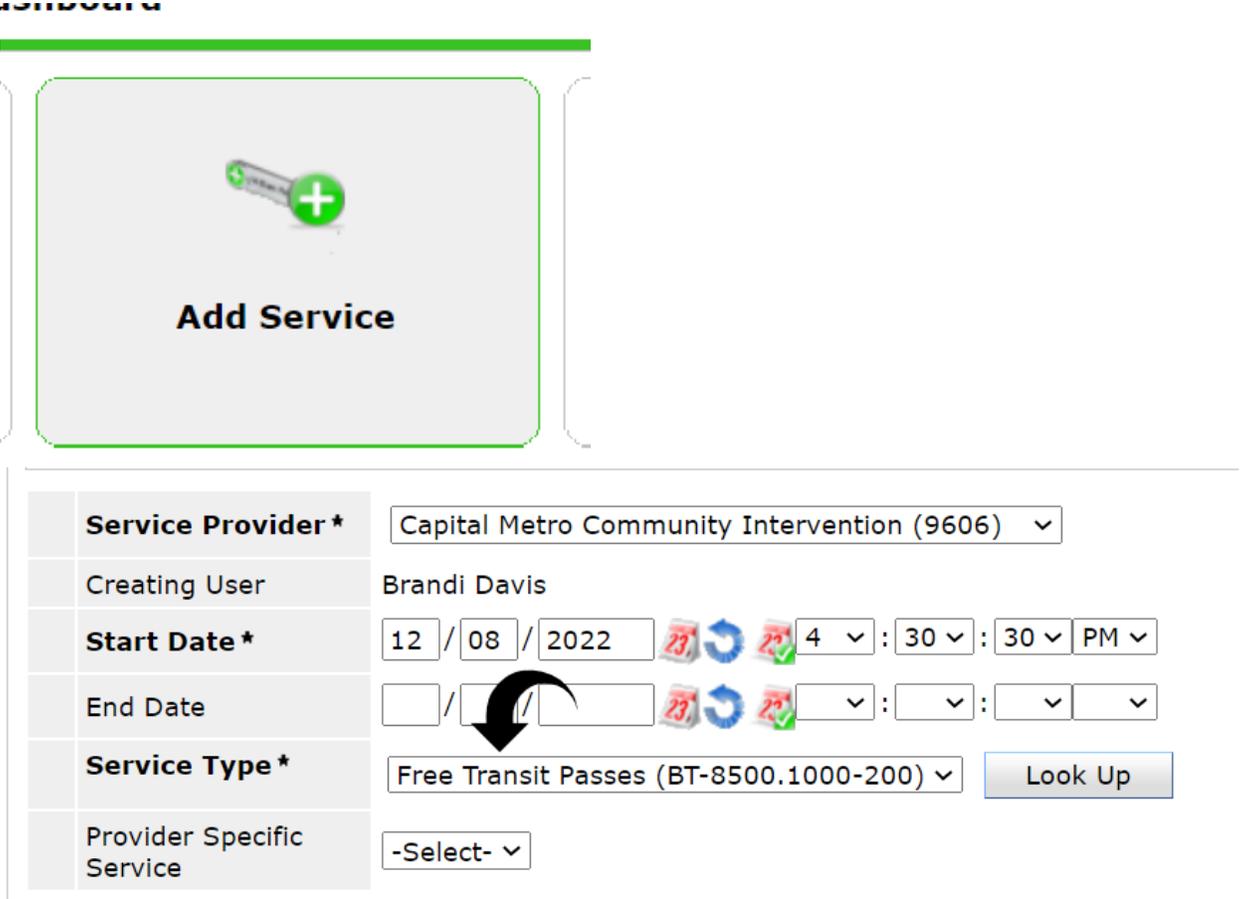


-Switch to Another Household Member- ▾ Submit

Service Transactions

Entry / Exit Case Managers Case Plans

2. Click on the Add Service tile> Choose Free Transit Passes from the Service Type drop down> Click Save and Continue.



Add Service

Service Provider *	Capital Metro Community Intervention (9606) ▾
Creating User	Brandi Davis
Start Date *	12 / 08 / 2022 23 4 ▾ : 30 ▾ : 30 ▾ PM ▾
End Date	/ / 23 : : : ▾
Service Type *	Free Transit Passes (BT-8500.1000-200) ▾ Look Up
Provider Specific Service	-Select- ▾

- If it is a one time service like a bus pass, go ahead and enter the end date as the same day the service was provided. It is decided internally within the agency you work with if it is required to enter anything under Service Notes and Service Costs. (You can use Service Notes to track the buss pass number, otherwise both sections can be left blank.) Click on Add Funding Source and choose TEF.

Service Provider *	Capital Metro Community Intervention (9606)
Creating User	Brandi Davis
Start Date *	12 / 08 / 2022 4 : 30 : 30 PM
End Date	12 / 08 / 2022 12 : 00 : 00 PM
Service Type *	Free Transit Passes (BT-8500.1000-200)
Provider Specific Service	-Select-
Service Notes	Bus pass #16171

Service Costs	
Number of Units	<input type="text"/>
Unit Type	-Select-
Cost per Unit	
Total Cost of Units	\$ <input type="text"/>

Apply Funds for Service	
Funding Sources	
Source	
TEF	
<input type="button" value="Add Funding Source"/>	

- Scroll down to Need Information> Click on the drop down next to Outcome of Need> Choose Fully Met> Click Save & Exit.

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