Service Transactions

It is very important that before you follow these steps and that you have already entered the household's Entry into the program by this point. For services to count in your reporting, the Start and End dates/times of your services must fall between your Entry and Exit dates/times. By following the entire workflow this will happen naturally and no adjustments should need to be made.

1. Click on **Add Multiple Services** from the Services dashlet on the Summary tab.

   (Whether you are only adding one Service or multiple Services in one sitting it's important that you always use the Add Multiple Services button)

2. Don't checkmark any additional household members.

3. Record the service **Start Date**. The **End Date** will automatically populate with the same date.

   (You can still change the End Date if needed).

4. Select a **Service** from the **Service Type** list.

   (SSVF providers may also need to select the SSVF Service or Financial Assistance Type that matches what was selected in the **Service Type** list and also enter SSVF Financial Assistance Amount).

   If the Service is a financial service:

   a. Click **Add Funding Source**:

   b. Click the ⊕ icon next to correct funding source to add it (e.g. HCRP, VA, YHDP)

   c. Enter the **Amount.**

   d. Click **Calculate.**

5. Select **Status of Need** and answer **Fully Met**.

6. Select **Outcome of Need** and answer **Closed**.

7. To record additional Services, click **Add Another**.

8. When you are done with services, click **Save & Exit**.

9. Click the **Client Information** tab to return to Summary.