

# Adding a Service

To record a service you provided to a client, start by opening your client's profile and scrolling down to the Entry/Exits dashlet. Verify that they have an open entry with your program—if they do not, create the entry before you add the service. If they have an entry, scroll down to the Services dashlet and click on Add Multiple Services.

**Client - (26860) Bowman, Test A**

Release of Information: Ends 10/07/2020

**Client Information**

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans | Measurements | Assessments

Added to the system 07/12/2007 02:25 PM

Name	Bowman, Test A	Gender	Trans Female (MTF or Male to Female)
Date of Birth	01/01/1998 (Age 21)	Primary Race	Client doesn't know (HUD)
Social Security	555-55-5555	Secondary Race	
		U.S. Military Veteran?	No (HUD)

**Release of Information**

Provider	Permission	Start Date	End Date
The Giving Closet	Yes	08/17/2016	08/17/2023
ASPIRE - HOME - COUNTY	Yes	11/06/2018	11/06/2022
SOAR Applicant Tracking Assessment	Yes	10/17/2019	10/17/2021
CSNW - FCS	Yes	10/17/2019	10/17/2021
Janus - Bridges	Yes	09/06/2019	09/06/2021
Impact NW - Homeless Prevention	Yes	08/28/2019	08/28/2021

**Entry/Exits**

Program	Type	Project Start Date	Exit Date
Council for the Homeless	HUD	10/28/2019	
HSC Diversion	HUD	10/25/2019	10/28/2019
HSC Prevention Diversion	HUD	04/25/2019	

**Households**

ID	Type	Head of Household	Relationship
43090	Single Male	Yes	Self
43201	Couple With No Children	Yes	Self
		No	partner

**Services**

Start Date	End Date	Provider
10/23/2019	10/23/2019	Share - Lincoln Place
10/23/2019	10/23/2019	Share - Lincoln Place
10/23/2019	10/23/2019	Share - Lincoln Place
10/22/2019	10/22/2019	Share - Day Center
10/17/2019	10/17/2019	CSNW - FCS
10/17/2019	10/17/2019	CSNW - FCS

**Add Multiple Services**

First, select the household members that were provided with the service. In this example, it was the head of household only that was provided with a service.

**Household Members**

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

- (43090) Single Male
- (26860) Bowman, Test A
- (43201) Couple With No Children
- (26860) Bowman, Test A
- (99994) Bowman, Cherise A

In the next section, select who provided the service and when. The provider will automatically be your current provider, whether you are in your default provider or using enter-data-as mode. The service provider must be the same as the related entry provider. Most services should be one day services, with matching start and end dates. The exception is rent payments; these should span the entire time for which rent was paid while the clients are in program.

**Multiple Services**

Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.

Service Provider\* **Council for the Homeless (220)**

Start Date\* 10/28/2019 10:00:53 AM

End Date 10/28/2019 10:00:53 AM

Please email [hmisrequest@councilforthehomeless](mailto:hmisrequest@councilforthehomeless) with any additional questions.

In the next section, select the service that was provided. Provider Specific Services only apply to a few programs, so if you don't see anything in that dropdown that is completely normal. All you need to complete is the Service Type dropdown. If you have irrelevant services or are missing services you need, let the HMIS team know and they can adjust your services appropriately.

The next section is only required if money was spent on this service. If funds were used, click on Add Funding Source, find your funding source in the pop-up (not pictured), and click the green circle with a plus sign. Again, if you do not see your funding source, please alert the HMIS team.

Adding a fund source will allow you to add the amount spent from that fund source. Do not add a fund source with no cost attached. If multiple funding sources were used to provide this service, you may add more funding sources and assign the correct amount to each. This example shows a \$75 service that used \$50 of flexible funds and \$25 of county funds. The total in the bottom right will auto-calculate.

Source	Amount
County	\$ 25.00
Flexible	\$ 50.00
<b>Total: \$75.00</b>	

In the last section, set the Need Status to Closed (in most circumstances—if this is being used differently in your program, always follow the program-specific guidance).

At this point you can also add more services for this client by clicking Add Another. This button will show another set of the same service fields, allowing you to complete them with different answers to add a different service. You can add up to five services this way.

When you are done, click Save and Exit. You have added a service!