

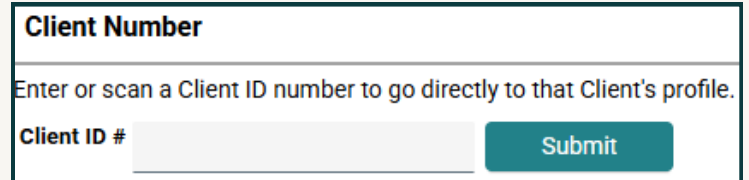
# Pinellas HMIS

## How To Add A Service Transaction

Service Transactions allow end users to track client needs, services provided, referrals, and outcomes. By adding a Service, a corresponding Need is automatically generated.

### 1 Navigate to the Client Profile

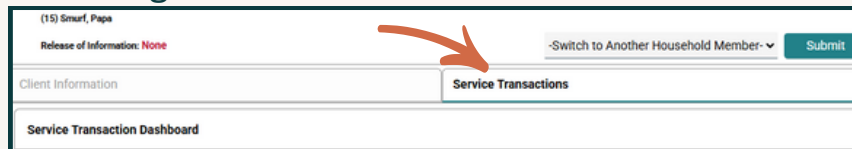
Click on "Clients" from the left-hand navigation pane. Search by client name or enter the client's HMIS ID # and click "Submit".



The screenshot shows a search form titled "Client Number". Below the title is a text input field with the placeholder text "Enter or scan a Client ID number to go directly to that Client's profile." To the right of the input field is a teal "Submit" button.

### 2 Navigate to Service Transactions

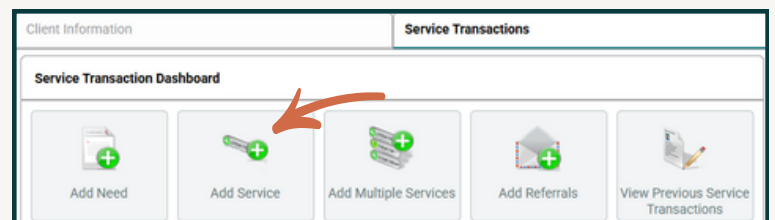
From the client's profile, click on the "Service Transactions" tab. This tab is where you can add, view, and manage services for the client.



The screenshot shows the top navigation area of a client profile. There are two tabs: "Client Information" and "Service Transactions". An orange arrow points to the "Service Transactions" tab. Above the tabs is a dropdown menu labeled "-Switch to Another Household Member-" and a "Submit" button.

### 3 Add a Service

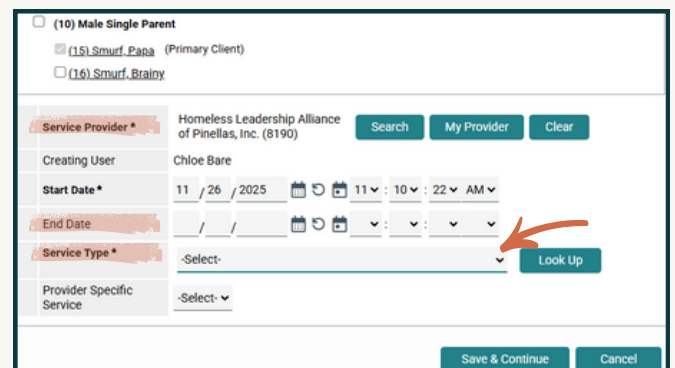
Click on the "Add Service" button. This will open the "Add Service" page where you will input the service details.



The screenshot shows the "Service Transaction Dashboard" with five buttons: "Add Need", "Add Service", "Add Multiple Services", "Add Referrals", and "View Previous Service Transactions". An orange arrow points to the "Add Service" button.

### 4 Service Details

On the "Add Service" page, ensure the appropriate household members are selected. Choose your Service Provider and select a "Service Type" from the dropdown. "Start Date" will auto-populate. Add an "End Date" (typically the same as the "Start Date"). Click "Save & Continue".



The screenshot shows the "Add Service" form. It includes a list of household members with checkboxes: "(10) Male Single Parent", "(15) Smurf, Papa (Primary Client)", and "(16) Smurf, Bralmy". Below this are fields for "Service Provider \*" (Homeless Leadership Alliance of Pinellas, Inc. (8190)), "Creating User" (Chloe Bare), "Start Date \*" (11/26/2025), "End Date", "Service Type \*" (a dropdown menu with an orange arrow pointing to it), and "Provider Specific Service". There are "Search", "My Provider", "Clear", "Look Up", "Save & Continue", and "Cancel" buttons.

## 5 Service Details Continued

Under “Service Notes”, add a brief description of the service provided. Then input the number of minutes spent on the Service.

Service Provider \* Homeless Leadership Alliance of Pinellas, Inc. (8190)  
Creating User Chloe Bare  
Start Date \* 11 / 26 / 2025  
End Date 11 / 26 / 2025  
Service Type \* Emergency Shelter (BH-1800)  
Provider Specific Service -Select-  
Service Staff -Select-  
Service Notes Brief description of the service provided.  
How many minutes were spent on this Service? 30

## 6 Optional: Service Costs

If used by your organization, input the “Number of Units” and “Total Cost of Units”. Click “Add Funding Source”. This will open a pop-up in which you can search for and select the appropriate funding source.

Service Costs  
Number of Units  
Unit Type -Select-  
Cost per Unit  
Total Cost of Units \$  
Apply Funds for Service  
Funding Sources  
Source Amount  
Add Funding Source Calculate Total: \$0.00

## 7 Optional: Follow Up Information

If desired, add a “Projected Follow Up Date” and select a “Follow Up User” from the dropdown. Follow Up Information is not required, but can be a helpful case management tool.

Follow Up Information  
Projected Follow Up Date  
Follow Up User Homeless Leadership Alliance of Pinellas, Inc. (8190)  
Follow Up Made -Select-  
Completed Follow Up Date  
Search My Provider Clear

## 8 Need Information

Select both a “Need Status” and “Outcome of Need” from the dropdowns. Note: all services should be entered as “Closed” and “Fully Met” as services are generally only entered into HMIS once they’re completed. Click “Save & Exit”.

Need Information  
Need Status \* Closed  
Outcome of Need Fully Met  
If Need is Not Met, Reason -Select-  
Save Save & Exit