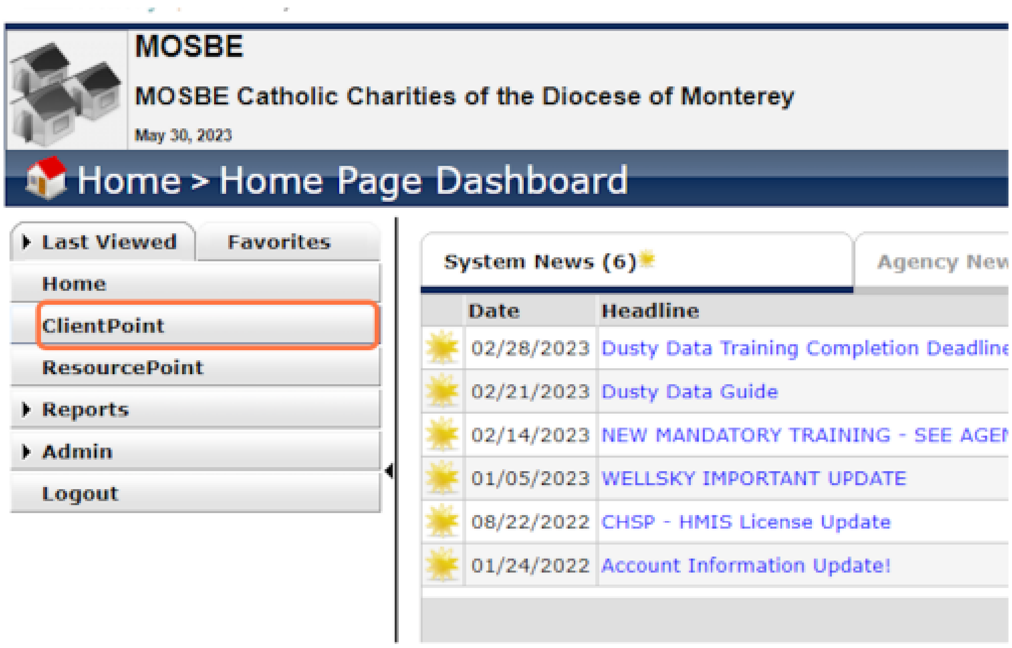
SERVICE TRANSACTIONS WORKFLOW

THE COALITION
OF HOMELESS SERVICES PROVIDERS

Service Transactions Workflow

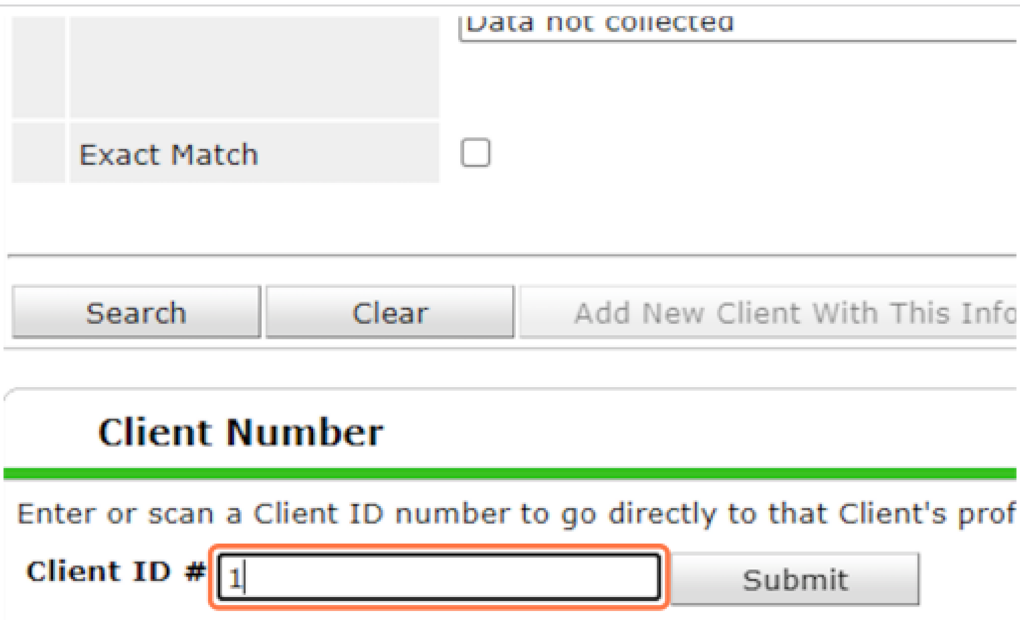
STEP 1

Click on ClientPoint



STEP 2

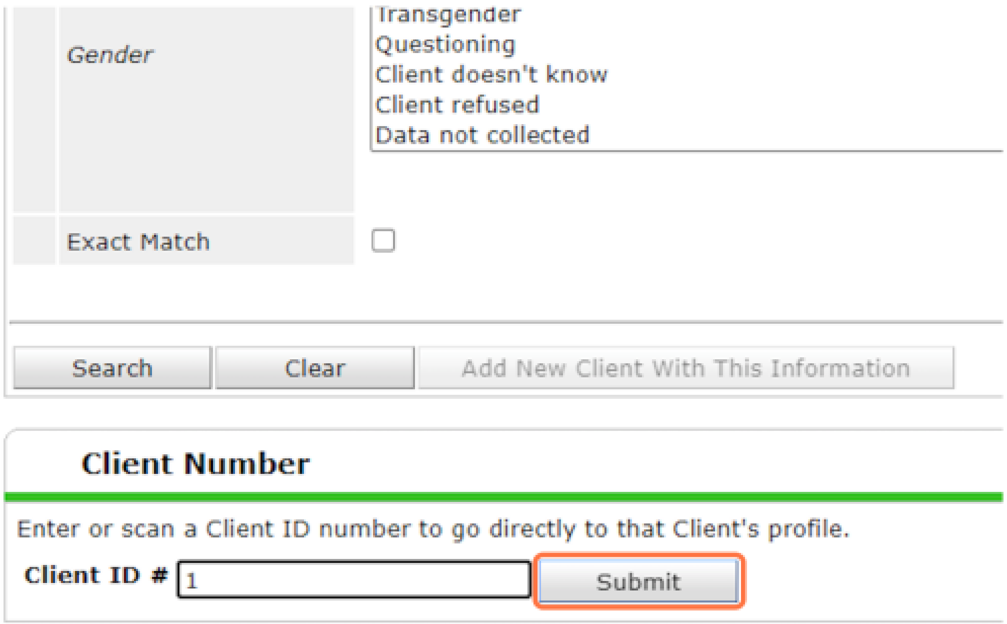
Enter Client ID



Service Transactions Workflow

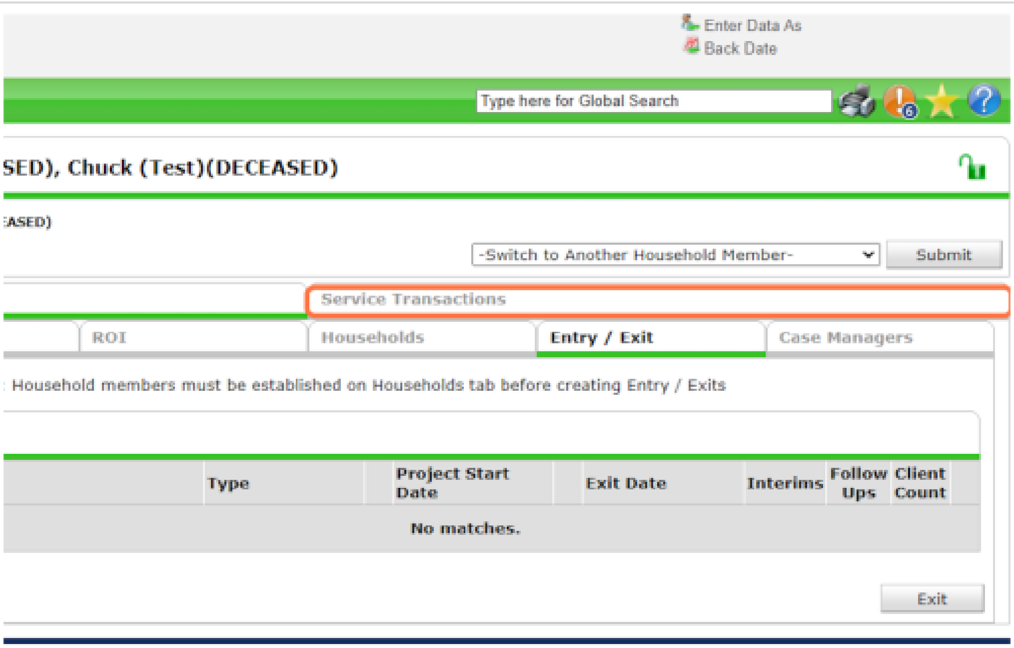
STEP 3

Click on Submit



STEP 4

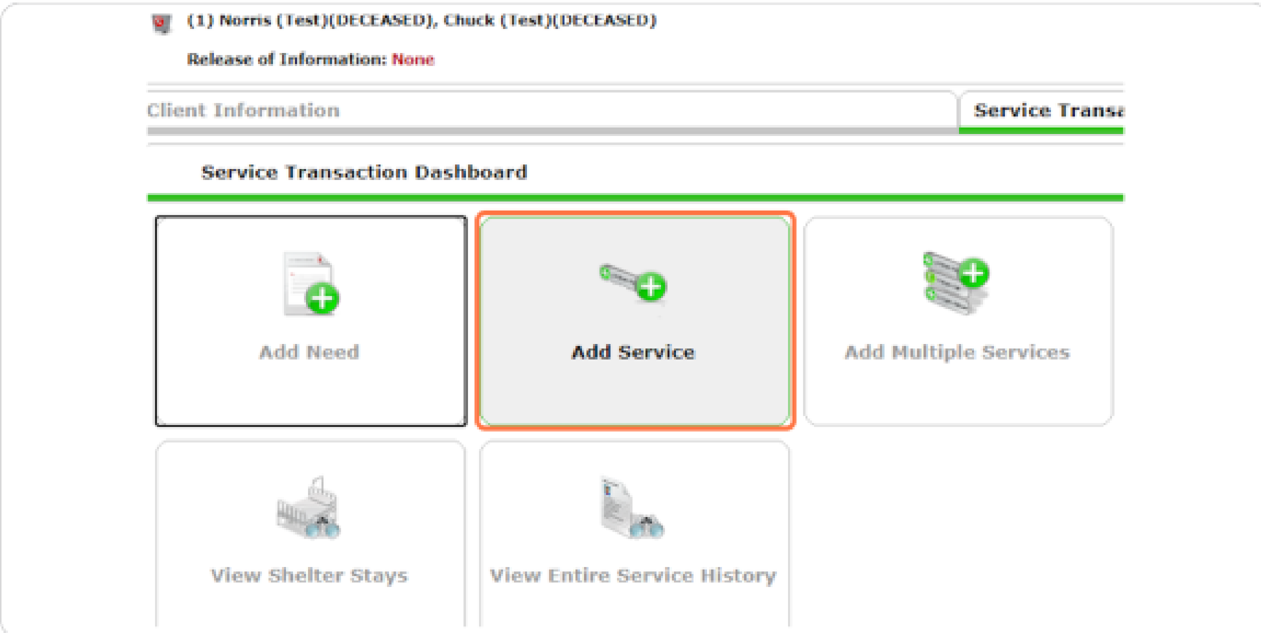
Click on the ServiceTransactions tab



Service Transactions Workflow

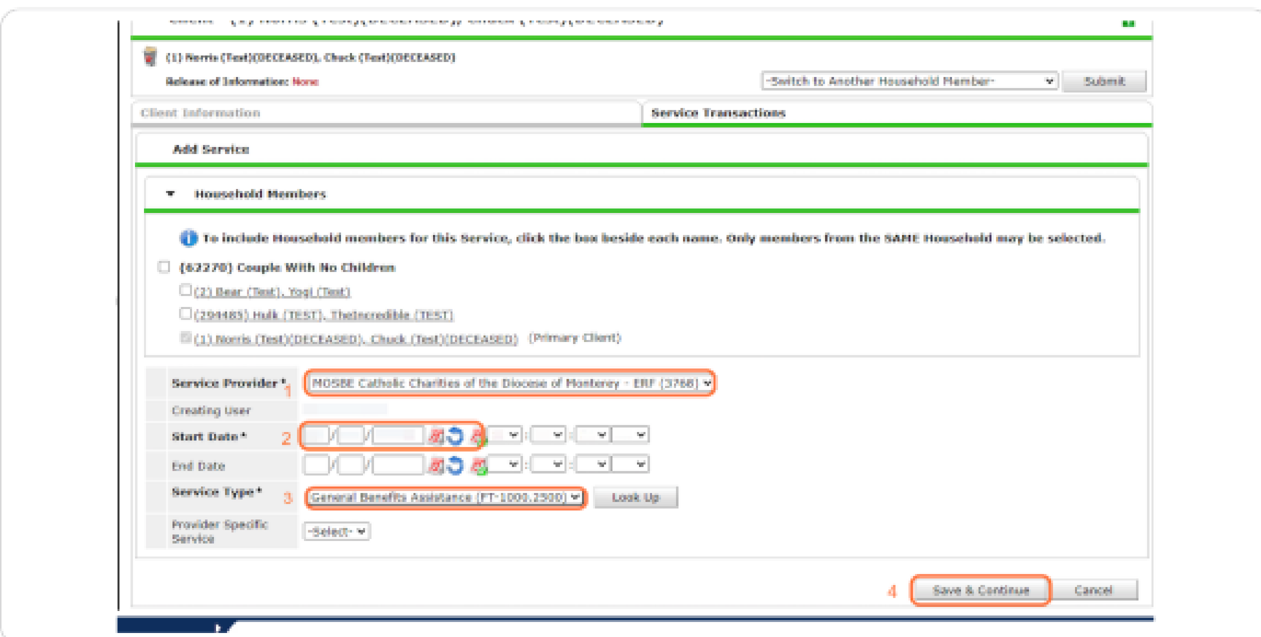
STEP 5

Click Add Service



STEP 6

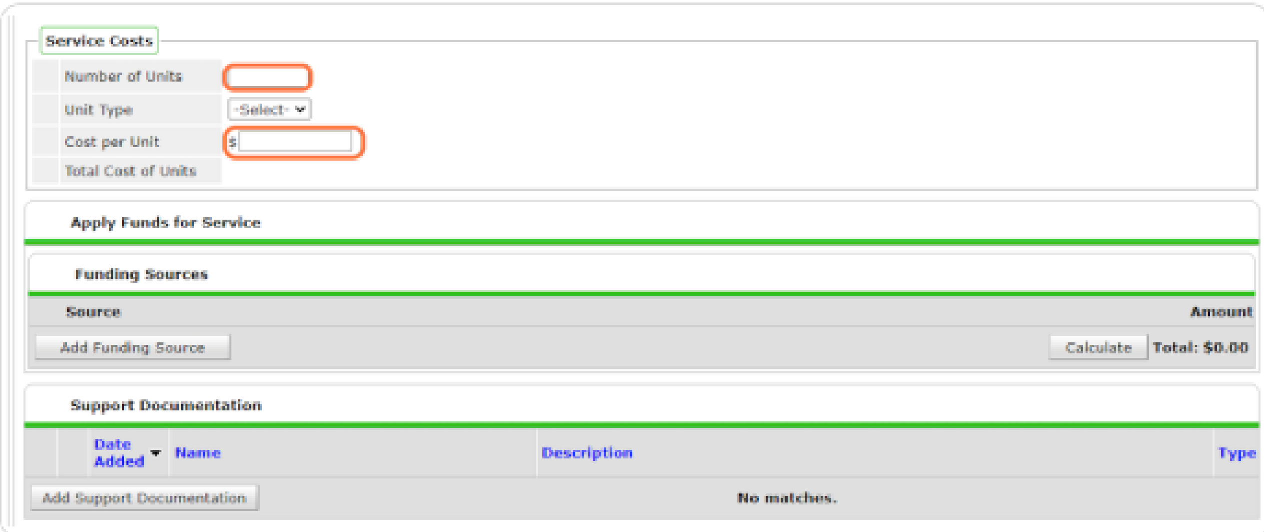
Select Provider, Enter the Start Date, Select the Service, then Save & Continue.



Service Transactions Workflow

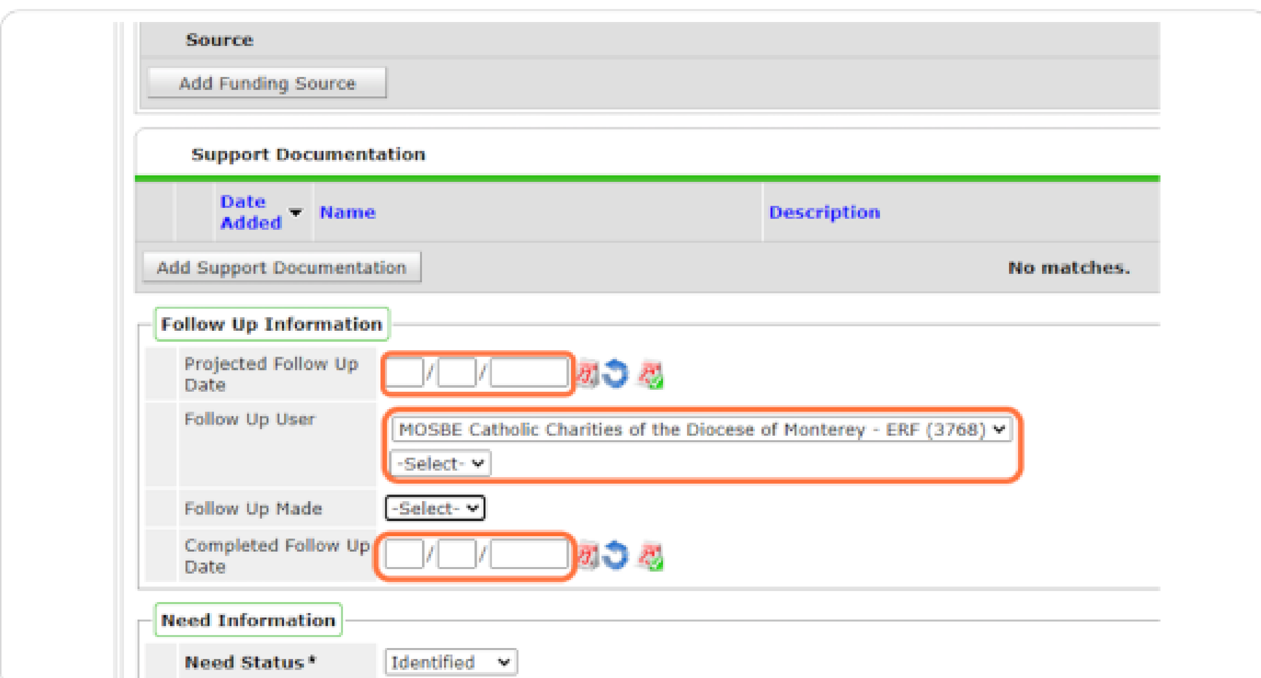
STEP 7

This section is optional. The data will reflect on the report; this does not affect the number of services.



STEP 8

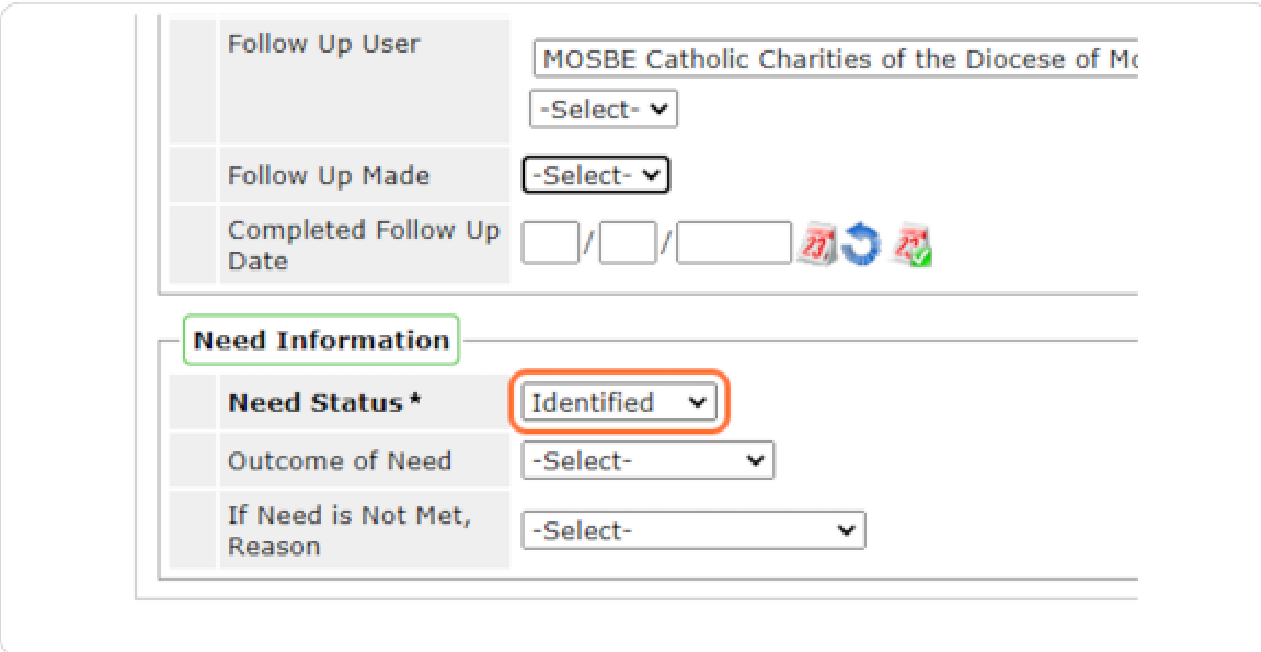
Complete the highlighted fields for FollowUp Information.



Service Transactions Workflow

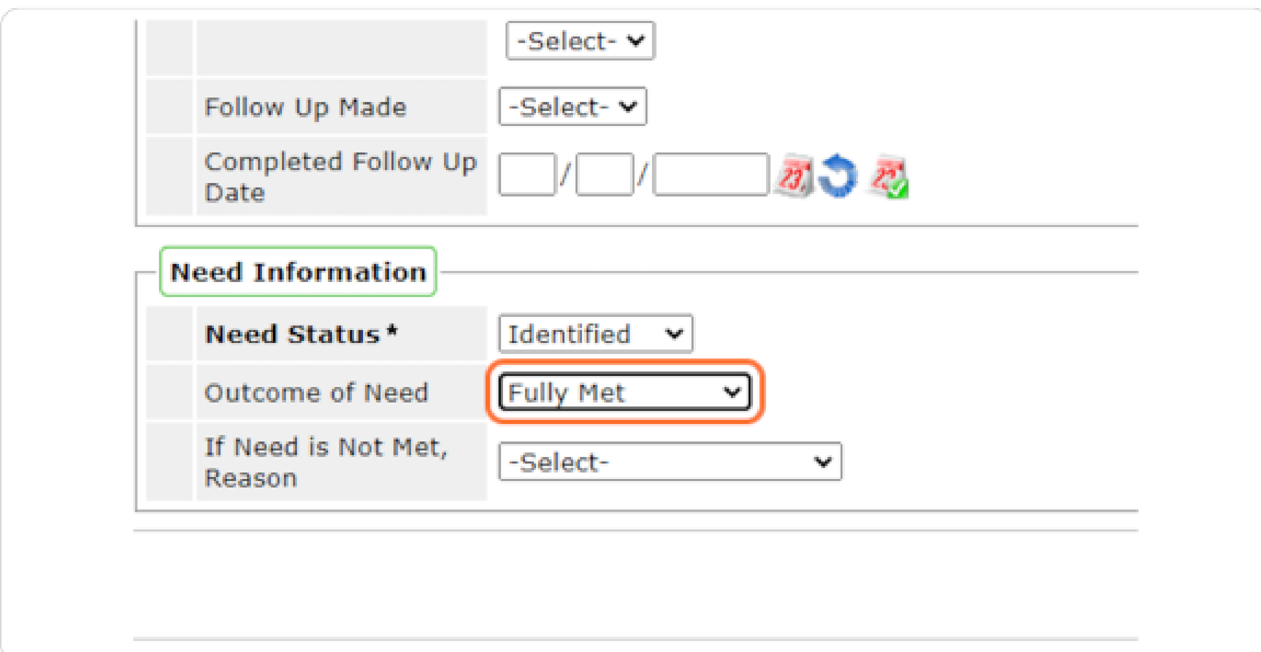
STEP 9

Identify the Need Status



STEP 10

Identify Outcome of Need (if applicable)



Service Transactions Workflow

STEP 11

Click on Save & Exit