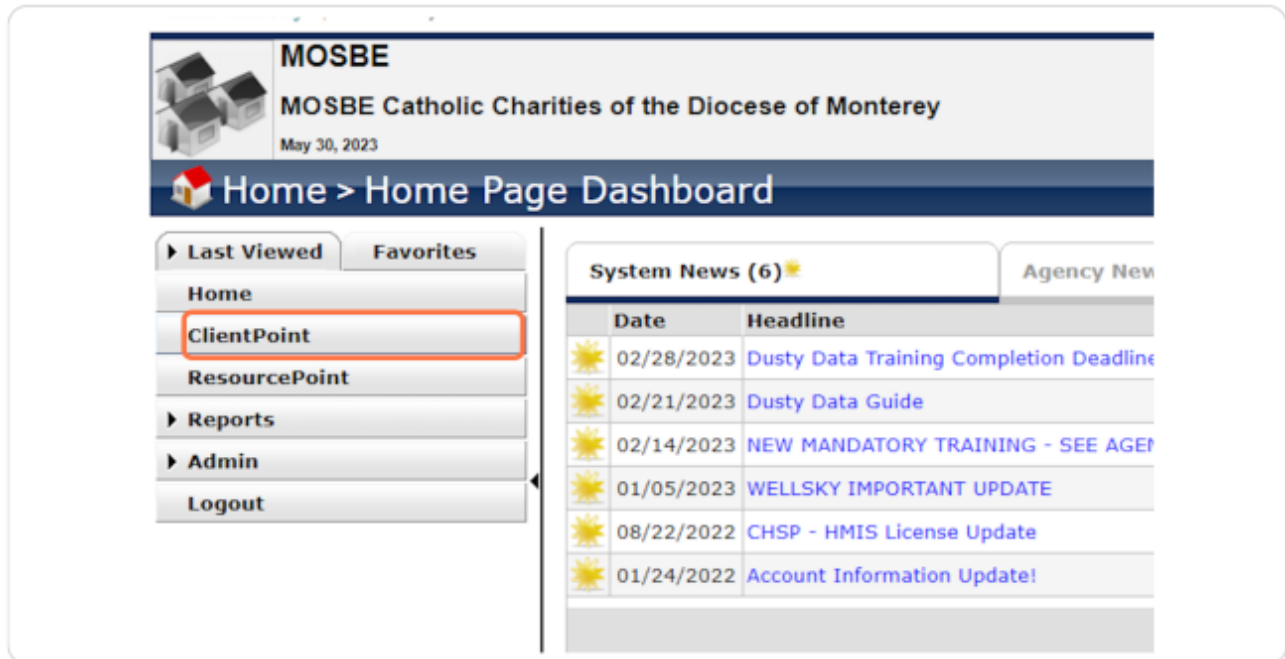


# **SERVICE TRANSACTIONS WORKFLOW**

# Service Transactions Workflow

## STEP 1

### Click on ClientPoint

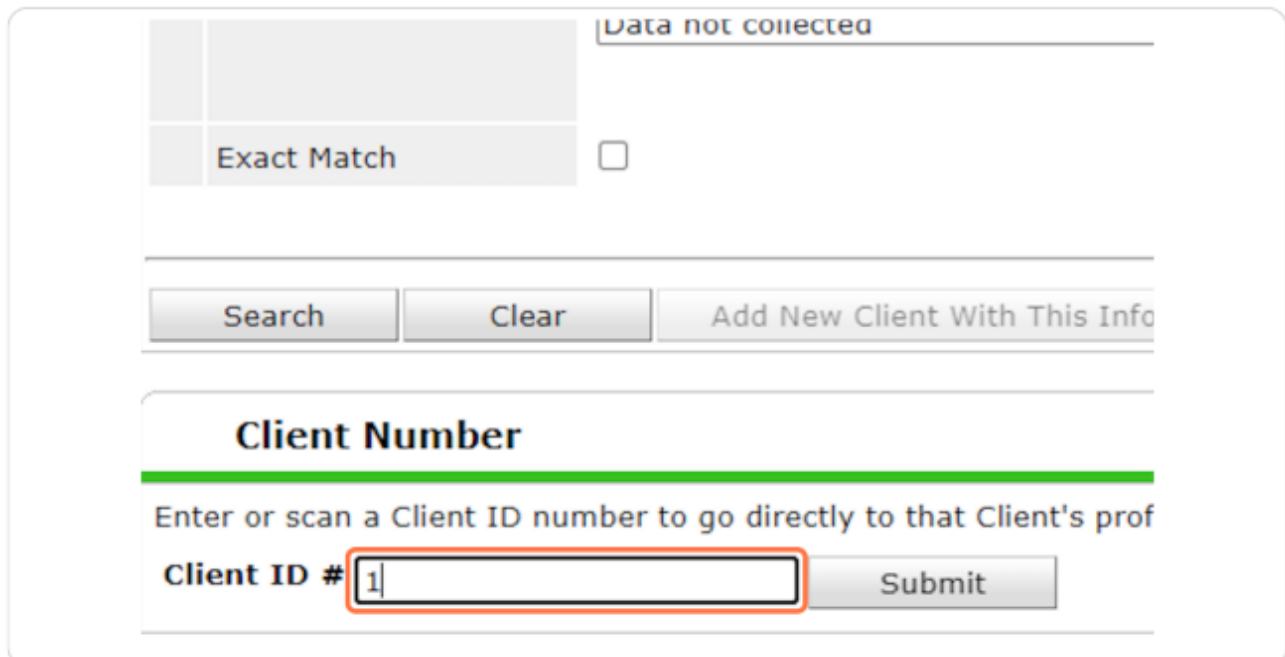


The screenshot shows the MOSBE Home Page Dashboard. The header includes the MOSBE logo, the text "MOSBE Catholic Charities of the Diocese of Monterey", and the date "May 30, 2023". Below the header is a navigation bar with "Home > Home Page Dashboard". On the left, there is a sidebar with a "Last Viewed" tab and a "Favorites" tab. The "Last Viewed" tab is active, and it lists several items: "Home", "ClientPoint" (highlighted with a red box), "ResourcePoint", "Reports", "Admin", and "Logout". On the right, there is a "System News (6)" section with a table of news items. The table has two columns: "Date" and "Headline". The news items are:

Date	Headline
02/28/2023	Dusty Data Training Completion Deadline
02/21/2023	Dusty Data Guide
02/14/2023	NEW MANDATORY TRAINING - SEE AGENCY
01/05/2023	WELLSKY IMPORTANT UPDATE
08/22/2022	CHSP - HMIS License Update
01/24/2022	Account Information Update!

## STEP 2

### Enter Client ID



The screenshot shows the Client ID entry form. At the top, there is a "Data not collected" label. Below it, there is a section for "Exact Match" with a checkbox. The "Search" button is highlighted with a red box. Below the search section, there is a "Client Number" section with a green header. The text "Enter or scan a Client ID number to go directly to that Client's profile" is displayed. Below this text, there is a "Client ID #" label and a text input field containing the number "1". The "Submit" button is highlighted with a red box.

# Service Transactions Workflow

## STEP 3

### Click on Submit

Gender

Transgender  
Questioning  
Client doesn't know  
Client refused  
Data not collected

Exact Match ☐

Search

Clear

Add New Client With This Information

**Client Number**

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # 

Submit

## STEP 4

### Click on the ServiceTransactions tab

Enter Data As  
Back Date

Type here for Global Search

SED), Chuck (Test)(DECEASED)

ASED)

-Switch to Another Household Member-

Submit

Service Transactions

ROIHouseholdsEntry / ExitCase Managers

Household members must be established on Households tab before creating Entry / Exits

Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
No matches.					

Exit

# Service Transactions Workflow

## STEP 5

### Click Add Service

(1) Norris (Test)(DECEASED), Chuck (Test)(DECEASED)  
Release of Information: **None**

Client Information | **Service Transactions**

**Service Transaction Dashboard**

Add Need

**Add Service**

Add Multiple Services

View Shelter Stays

View Entire Service History

## STEP 6

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

(1) Norris (Test)(DECEASED), Chuck (Test)(DECEASED)  
Release of Information: **None** -Switch to Another Household Member- Submit

Client Information | **Service Transactions**

**Add Service**

**Household Members**

**To include Household members for this Service, click the box beside each name. Only members from the SAME Household may be selected.**

☐ (62270) Couple With No Children

☐ (2) Bear (Test), Yogi (Test)

☐ (294485) Hulk (TEST), The Incredible (TEST)

☒ (1) Norris (Test)(DECEASED), Chuck (Test)(DECEASED) (Primary Client)

**Service Provider \*** 1 MDSBE Catholic Charities of the Diocese of Monterey - ERF (3768)

Creating User

**Start Date \*** 2 MM/DD/YYYY

End Date

**Service Type \*** 3 General Benefits Assistance (FT-1003.2320) Look Up

Provider Specific Service -Select-

4 Save & Continue Cancel

# Service Transactions Workflow

## STEP 7

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

Service Costs

Number of Units

Unit Type

Cost per Unit

Total Cost of Units

Unit Type

-Select-

\$

Apply Funds for Service

Funding Sources

Source

Amount

Add Funding Source

Calculate

Total: \$0.00

Support Documentation

Date Added

Name

Description

Type

Add Support Documentation

No matches.

## STEP 8

Complete the highlighted fields for FollowUp Information.

Source

Add Funding Source

Support Documentation

Date Added

Name

Description

Type

Add Support Documentation

No matches.

Follow Up Information

Projected Follow Up Date

Follow Up User

Follow Up Made

Completed Follow Up Date

Projected Follow Up Date

Follow Up User

Follow Up Made

Completed Follow Up Date

Projected Follow Up Date

Follow Up User

Follow Up Made

Completed Follow Up Date

Projected Follow Up Date

Follow Up User

Follow Up Made

Completed Follow Up Date

Need Information




Need Status \*

Identified

# Service Transactions Workflow

## STEP 9

### Identify the Need Status




Follow Up User	MOSBE Catholic Charities of the Diocese of Mo
	-Select- ▼
Follow Up Made	-Select- ▼
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   

**Need Information**

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

## STEP 10

### Identify Outcome of Need (if applicable)

	-Select- ▼
Follow Up Made	-Select- ▼
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   

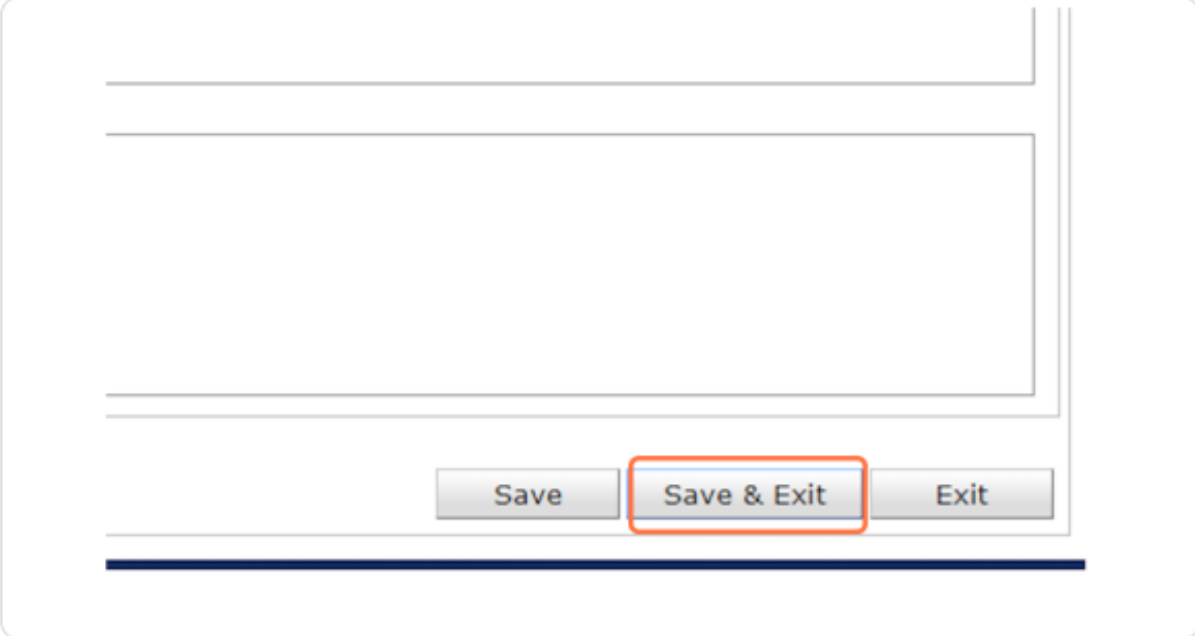
**Need Information**

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

# Service Transactions Workflow

## STEP 11

Click on Save & Exit



A screenshot of a web form for service transactions. The form contains several empty text input fields. At the bottom right of the form, there are three buttons: 'Save', 'Save & Exit', and 'Exit'. The 'Save & Exit' button is highlighted with a red rectangular border. Below the buttons is a thick dark blue horizontal line.