

Service Transactions

1. From the Household View Screen, click on the name of your program.
2. From the Household Transactions Summary Screen you can enter a **New Transaction** by selecting the type of Service Transaction from the **Service Transaction** dropdown menu and clicking the New Transaction button.

3. Enter the info in the Service Transaction New screen as in the 3 examples below.

Example 1. Rx Assistance

Service Transaction New

APC Service: Health Care-RX ASSISTANCE

HH Member(Choose the Applicant(App) and all the clients(C) receiving the service)

App	C	Client
<input checked="" type="radio"/>	<input type="checkbox"/>	DEPUTY DOG
<input type="radio"/>	<input checked="" type="checkbox"/>	POLLY PUREBRED

Service Details:

Start Date: * End Date:

of Units: DOLLAR* Intake Worker: *

Value/unit: \$1.00 Dollar Value: \$25.00

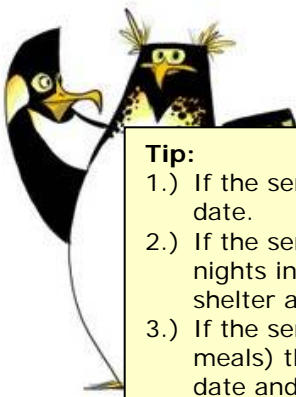
In this example- I gave a voucher for \$25 to Polly.

HH Member- Only one person in the HH actually received/used this service so only her name is checked.

Dates- This service was a one time event so the start and end date are the same.

Units- enter the number of Units.

click save



Tip:

- 1.) If the service occurred on a specific date use this date for the start and end date.
- 2.) If the service occurred over a series of contiguous dates (such as three nights in a row at a shelter) then enter the date entered and exited the shelter as the start and end date.
- 3.) If the service occurred multiple times throughout the month (such as daily meals) then use the first and last day of the month as the start and end date and enter the total meals for the month.

Example 2. Utility Assistance

Service Transaction New

APC Service: Housing/Shelter-UTILITY ASSISTANCE

HH Member(Choose the Applicant(App) and all the clients(C) receiving the service)

App C Client

DEPUTY DOG

POLLY PUREBRED

Service Details:

Start Date: * End Date:

of Units: DOLLAR* Intake Worker: *

Value/unit: \$1.00 Dollar Value: \$50.00

In this example- I gave a voucher for \$50 to the Household.

HH Member- Click on all the names since the utilities are used by whole HH.

Dates- The utility payment is for the month of March so I entered March 1 and March 31.

Units- I entered \$50 because that is the amount on the voucher.

click save

If the payment was for a past due amount (arrearages) then the start and end date would be the same date- the date I committed the funds or wrote the check.

Example 3. Night of Shelter

Service Transaction New

APC Service: Temporary Housing-NIGHT SHELTER

HH Member(Choose the Applicant(App) and all the clients(C) receiving the service)

App C Client

DEPUTY DOG

POLLY PUREBRED

Service Details:

Start Date: * End Date:

of Units: NIGHTS* Intake Worker: *

Value/unit: \$12.50 Dollar Value: \$50.00

Grant **Amount**

In this example- I gave four nights of shelter to the Household.

HH Member- Click on all the names since the whole household received shelter.

Dates- This household received 4 nights of shelter throughout the month so I enter March 1 and March 31.

Units- I entered 4 because that is the number of nights they stayed at the shelter/

click save

- When you go back to the household transaction screen you can see the list of transactions the household has received from your program.

Service Transactions (click service type to edit)

Service Type	Intake Worker	Start Date	End Date	Service Name	# of Units
Health Care	LNS	03-19-2009	03-19-2009	RX ASSISTANCE	25
Temporary Housing	LNS	03-01-2009	03-31-2009	NIGHT SHELTER	4
Housing/Shelter	LNS	03-01-2009	03-31-2009	UTILITY ASSISTANCE	50

If you have questions on how to enter a service transaction or if you need a transaction added to the dropdown list, please contact Lisë Stuart at (541) 682-3379 or Lise.STUART@CO.Lane.OR.US.