All HUD CoC Program funded projects are to keep HMIS records of the time spent on case management with clients through service transactions.

If working with a household, the service transaction should include all household members.

**Recording a case management service transaction**

- Navigate to a client record by going to ClientPoint and entering the client ID # or searching for the client by name.
- From the client profile, click on the Service Transactions tab to bring up the Service Transaction Dashboard. Click on the ‘Add Multiple Services’ icon.

**Skip if working with a single.** If working with a multi-person household, check the boxes next to the names of all of the household members who are included in the program entry.

- If a household member shows up on the list, but is not a participant of your program, exclude them from the service transaction by leaving their box unchecked.
Ensure that the correct program is identified in the ‘Service Provider’ section. This will default to the program that you are currently entering data as.

- If you enter data for more than one program, always make sure to change your “Enter Data As” provider to the program you are entering information for.

Under the ‘Service List’ heading, change the Start Date to the actual date of the case management meeting, phone call, etc. The End Date will automatically change to the same date as the Start Date.

Next, click on the Edit Pencil next to the Service Type field and in the ‘Edit Service Type’ pop-up window choose the Case/Care Management (PH-1000) from the drop-down list. Click the Submit button to proceed.

Under ‘Service Costs’, the ‘Number of Units’ should reflect the number of hours spent on case management with the client on that date. The number of units should always be recorded by the quarter hour (ex. 0.25, 0.50, 0.75, 1, 1.25, etc).

In the ‘Unit Type’ choose Hour(s) from the drop-down list.
In the ‘Need Information’ section answer:

- Need Status = Closed
- Outcome = Fully Met

If finished, click the ‘Save and Exit’ button.

If you have additional services to add to this household’s record, you can click ‘Add Another’ and repeat the process for more services.

Services can be reviewed under the ‘Services’ tab of the ‘Service Transactions’ section of a client’s record. All ‘Case/Care Management’ service transactions dated 12/1/2013 or later should have both the Service Units and Service Units Type completed.