Community Services

Service Transactions Workflow

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Contact WellSky Support

Please be sure to identify your full name and the name of your organization in voicemails or emails.

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Introduction

Service Transactions include identifying the client’s needs, the services and providers who can meet the needs, and creating referrals to providers for services.

Community Services uses the 211 Human Services Indexing System (211HSIS) Taxonomy (formerly known as AIRS Taxonomy). This taxonomy provides a standardized set of terms that are used to index and retrieve information about the wide variety of human services. In Community Services, the service that is selected for a client is the same as the Taxonomy Term. For example, Case Management is a named service, and it corresponds to the 211HSIS Taxonomy code of Long Term or Transitional Case/Care Management.

A Wizard will guide you through the process of creating a need, a service, and a referral. However, if you don’t create a need first, it is automatically added when you order the service and/or make a referral. Services and referrals can be just for the client, or for the client and members of their household.

EXAMPLE – Margie is a single mom to her 9 year old daughter, Heidi and has recently been evicted from her apartment. Now, she needs a place to stay and other case management services for her and her daughter.

Need: Emergency Shelter
Services: Shelter and Case Management
Referral: Local family shelter and a case manager

Add a need

Before a service is identified, a client need can be created first.

NOTE – This document outlines the process of creating a need first, then adding a service and finally, a referral. However, adding a need separately from a service or referral is not required. When you add services and referrals, the need is automatically created, saving data entry time.

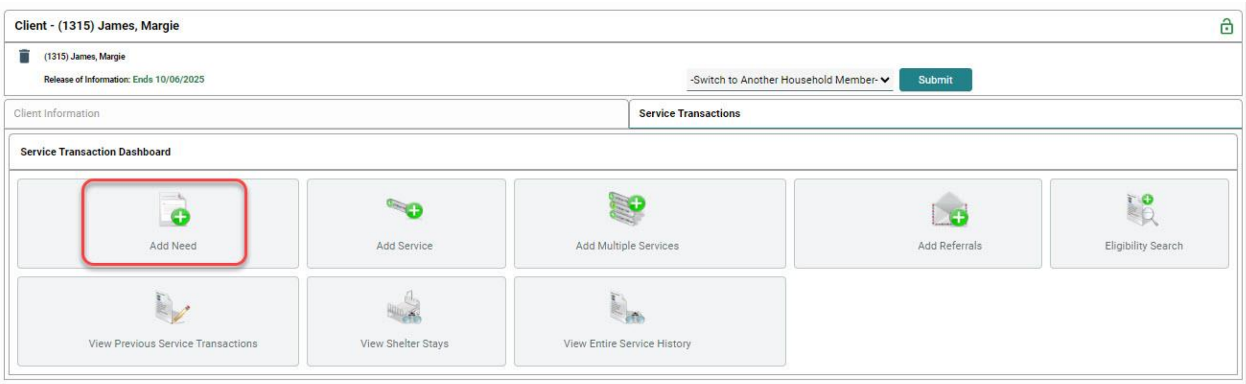
If you are only identifying the need but are not creating services and/or referrals, you can follow this process to add a need and come back to it later.

1. From the Side Navigation Panel, click **Clients**.

2. Search for and open the client record.

3. Click the **Service Transactions** tab. The Service Transaction Dashboard is displayed.

4. Click **Add Need**.

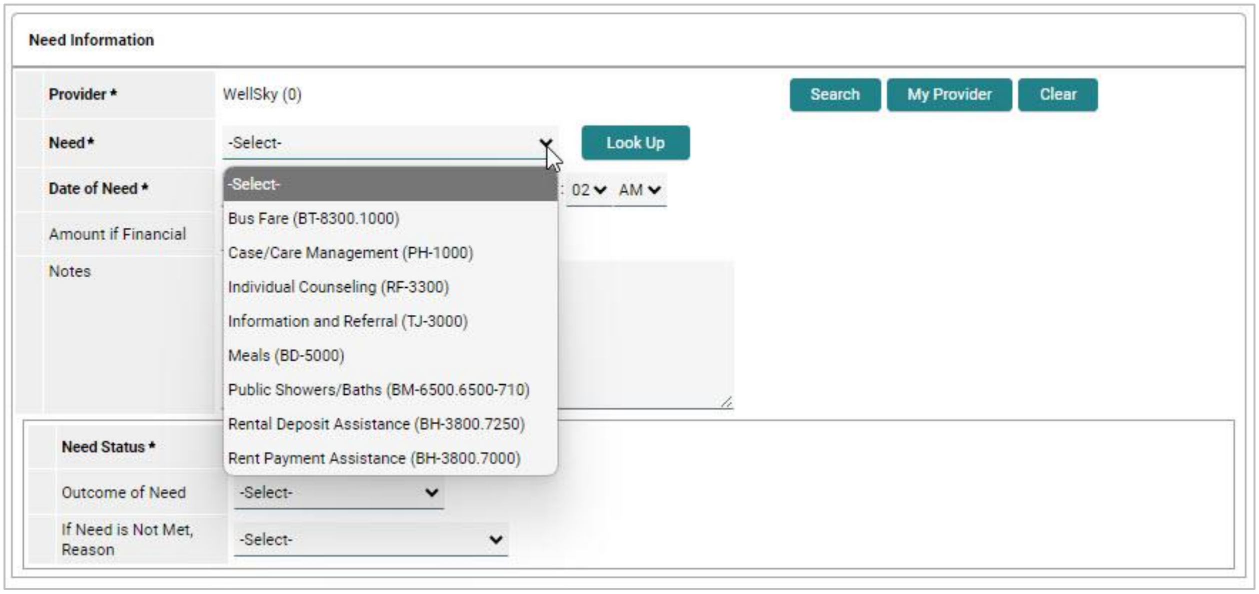


5. If the client is a member of a household, select the household member(s) with the same need.

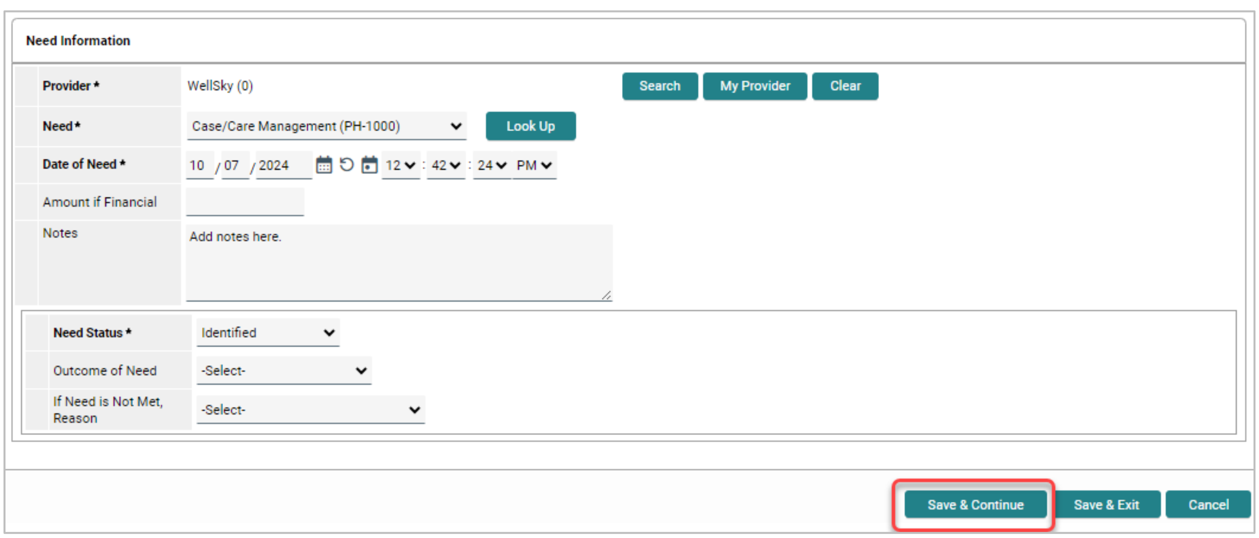
6. The provider automatically defaults to the provider with which your user account is associated. To change the provider in the Need Information section, click **Search** next to the Provider field and select a different provider.

7. Click the arrow in the Need field and select the need. This list is managed by your administrator.

a. If the need is not listed, click **Look Up**. For more information, see Look Up.

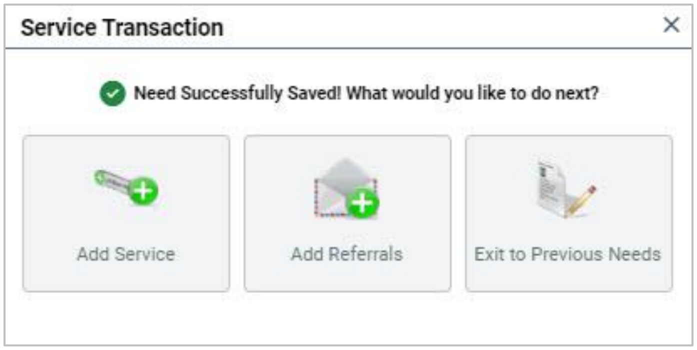


8. Edit the Date of Need, if necessary.
9. If the need is monetary, enter the amount in the Amount if Financial field.
10. Add notes, if needed.
11. Click **Save & Continue** to save the need.



12. A Service Transaction screen is displayed. From here, you can add a service or a referral or save the need and add the service and/or referral information later.
13. If there is only one need click **Exit to Previous Needs**.

TIP – A Wizard is displayed where you can continue to add a service and a referral. If you are only adding a need, you can add services and referrals later.

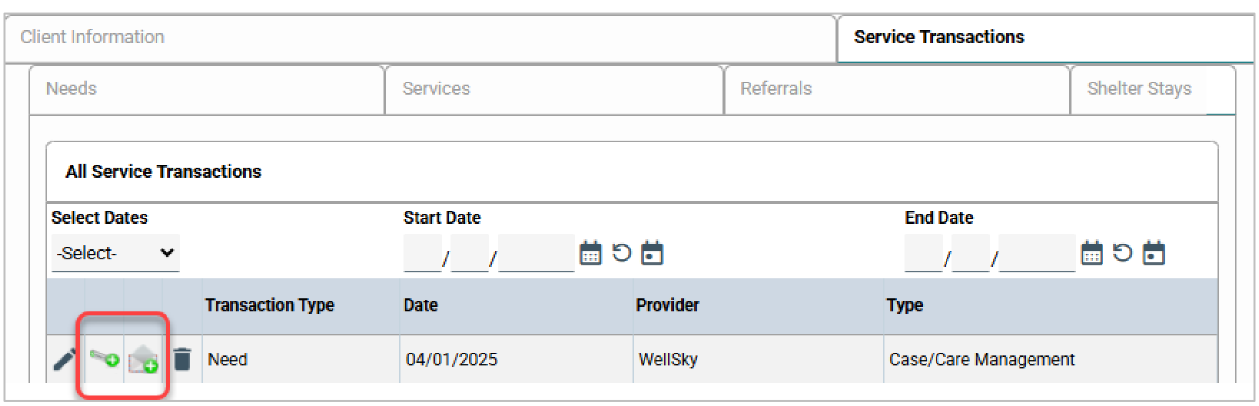


Add a service

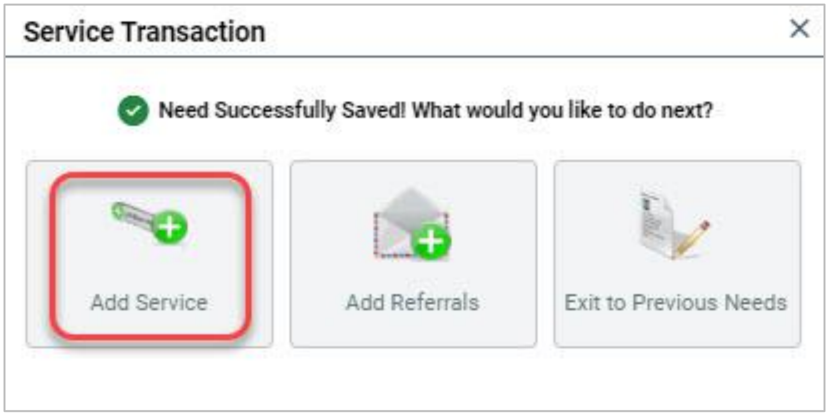
After a need has been identified, a service can be added to address the need.

NOTE – If you're adding a need, service, and referral at the same time, the Wizard will guide you through each step. When you add a need and then add the service and/or referral later, follow these steps:

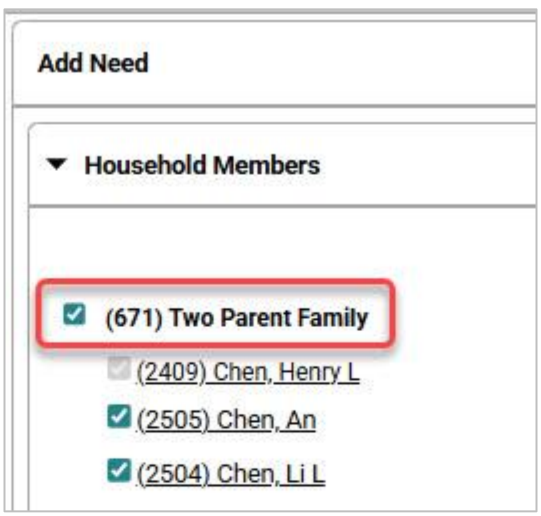
1. Open the client record.
2. Click the **Service Transactions** tab.
3. Click **View Entire Service History**.
4. In the Transaction Type column, locate the need.
5. Click either the **Add Service** or **Add Referral** icons.
6. Follow the steps in the relevant section of this document.



1. Click **Add Service**.



2. If the client is a member of a household, select household members to include in the service. If there are several household members and you want to select all of them, click the Family Type option.

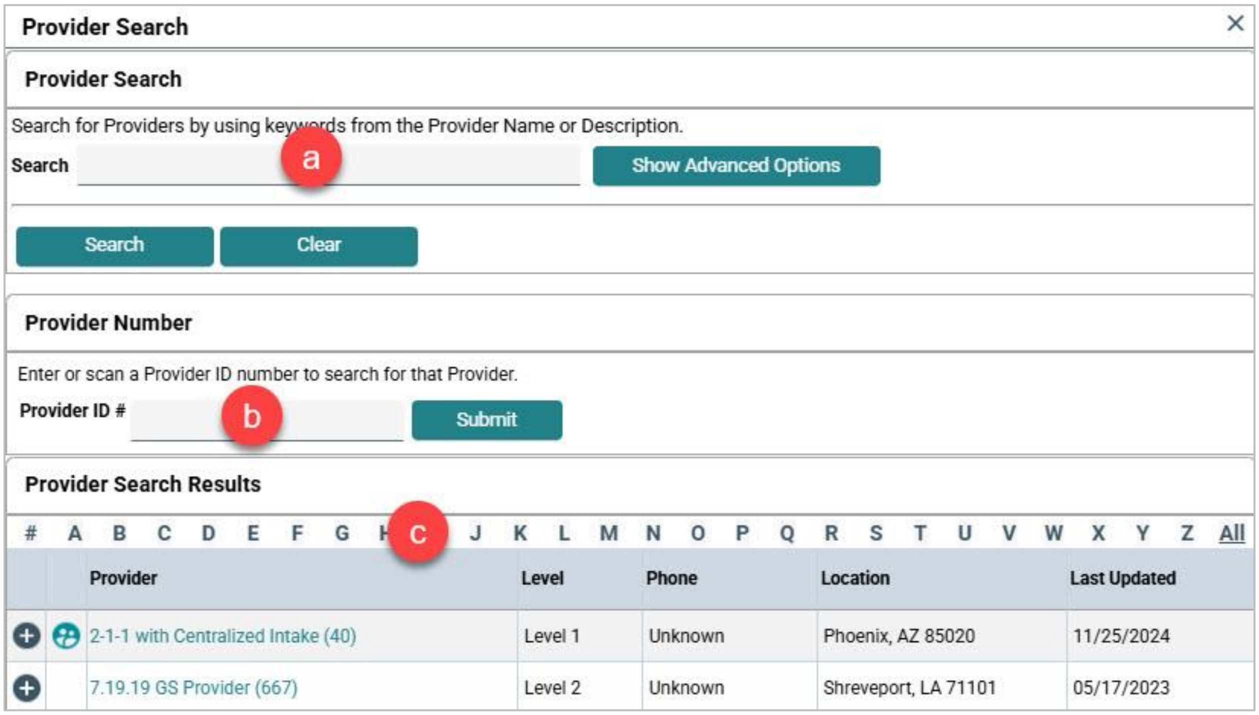


3. The Service Provider defaults to your assigned provider. To change it click **Search** and use one of the following methods to locate the provider record.

a. Enter all or part of the provider name in the Search field.

b. Enter the Provider ID and click **Submit**.

c. Click a letter of the alphabet to display a list of providers whose name begins with the letter.

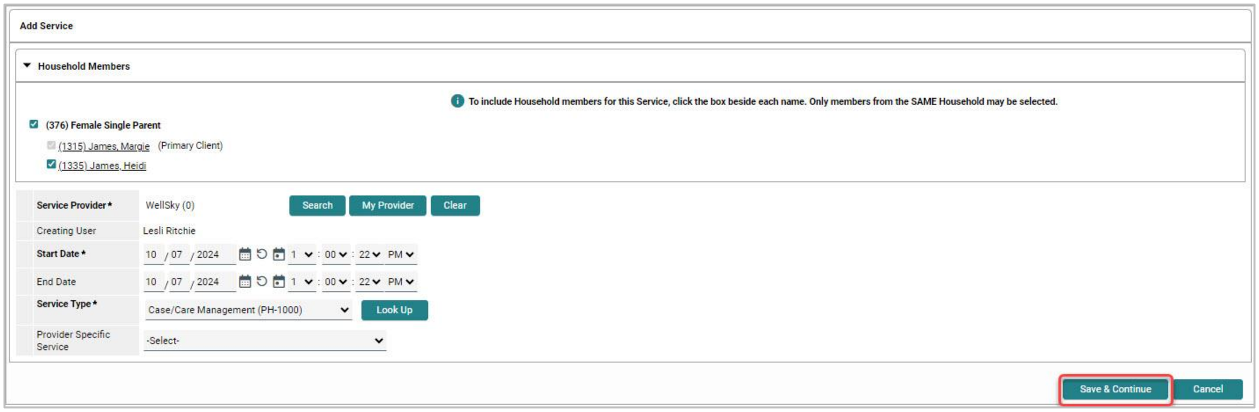


4. The date and time default to the current system date or the back date. Edit these fields, if needed.

5. Select the service type or click **Look Up**. For more information, see Look Up.

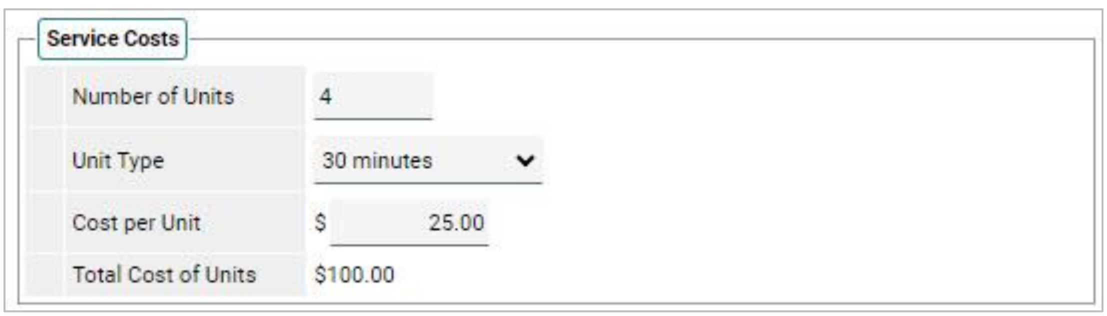
6. The Provider Specific Service field is a picklist users can create to display the services they use most frequently. Select a Provider Specific Service, if needed.

7. Click **Save & Continue**.

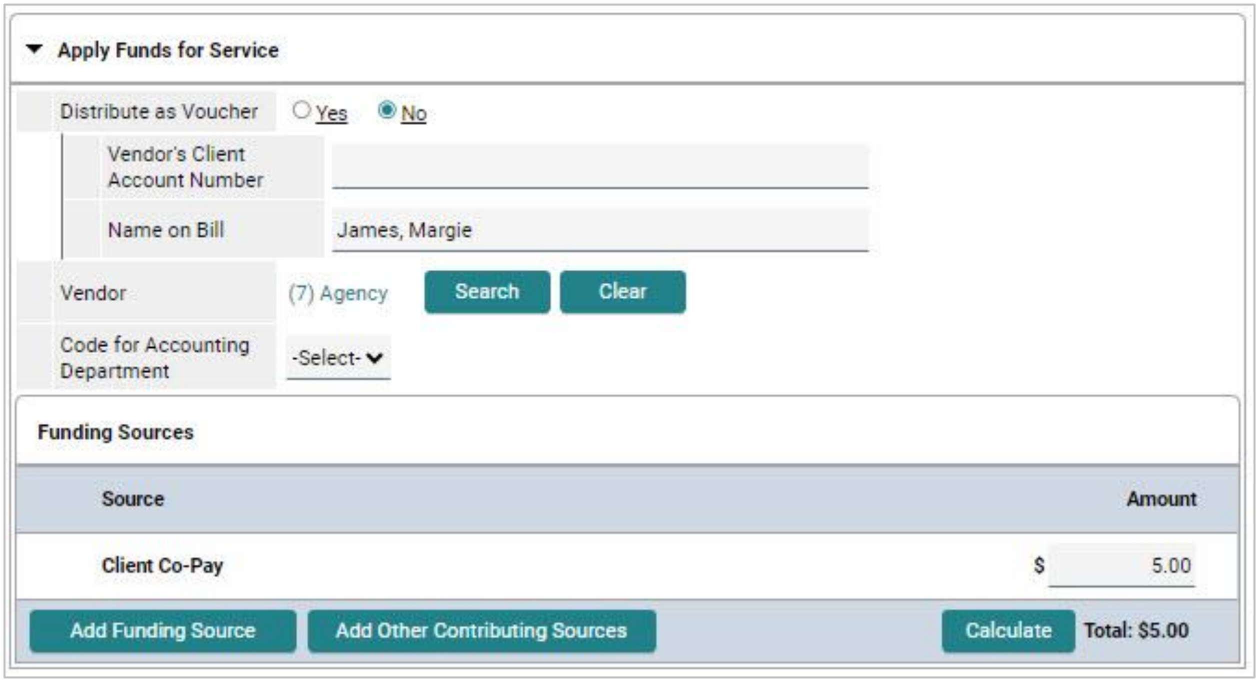


8. One or more sections are displayed, depending on your agency's workflow. Complete these sections as directed by your organization.

9. If your organization tracks service costs, in the Service Costs section, enter the number of units, the unit type, and the cost per unit. The Total Cost of Units is calculated automatically.



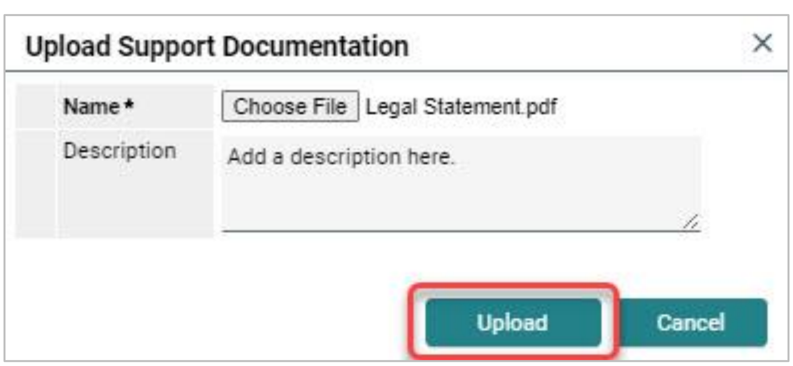
10. If your organization requires that you identify the funds to pay for the service, complete the Apply Funds for Service section.



11. Add supporting documentation, if needed. In the Support Documentation section, click **Add Support Documentation**.

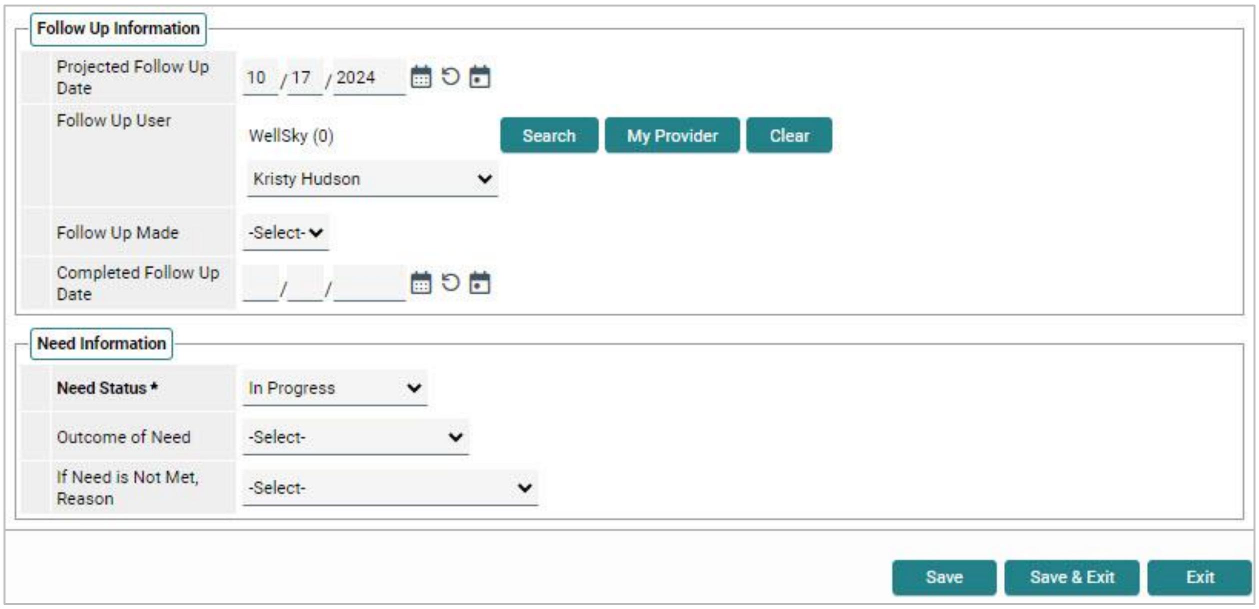
12. Click **Choose File** and browse to the file you want to attach. Add a description of the file, as needed.

13. Click **Upload**.



14. In the Follow Up Information section, identify the user who will follow up with the client. The Follow Up User will receive a notification on their Dashboard, in the Follow Up List and will update the Outcome of Need, and a reason the need was not met, if any.

15. When finished, click **Save & Exit**.

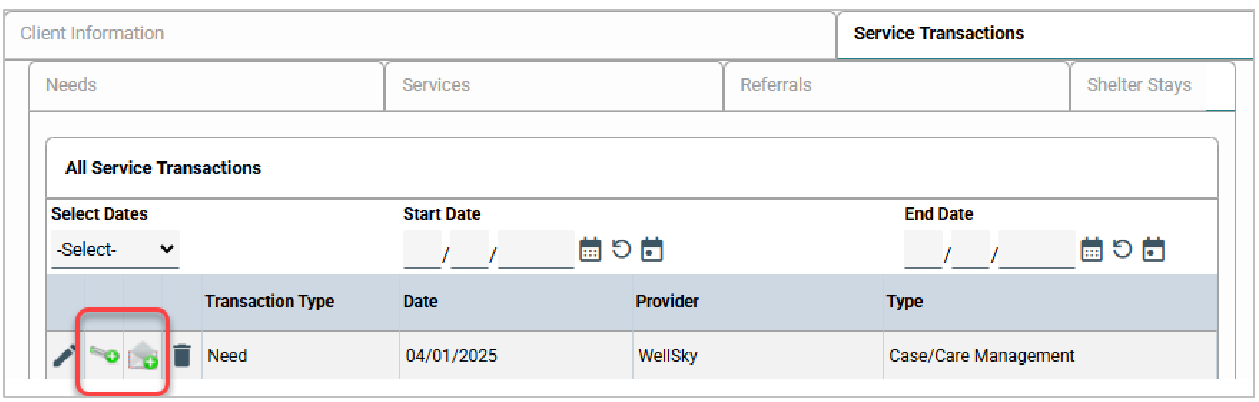


Add a referral

Referrals are used to direct clients to providers who offer services to meet their needs. In Community Services, referrals can be identified for follow up by a specified user and tracked on their Dashboard.

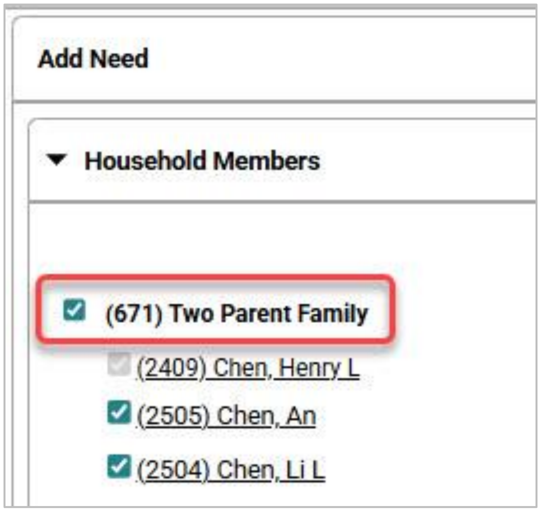
NOTE – If you're adding a need, service, and referral at the same time, the Wizard will guide you through each step. When you add a need and add the service and/or referral later, follow these steps:

1. Open the client record.
2. Click the **Service Transactions** tab.
3. Click **View Entire Service History**.
4. In the Transaction Type column, locate the need.
5. Click either the **Add Service** or **Add Referral** icons.
6. Follow the steps in the relevant section of this document.



1. After adding a service, click **Add Referral**.

2. If the client is a member of a household, select household members to include in the referral. If there are several household members and you want to select all of them, click the Family Type option.



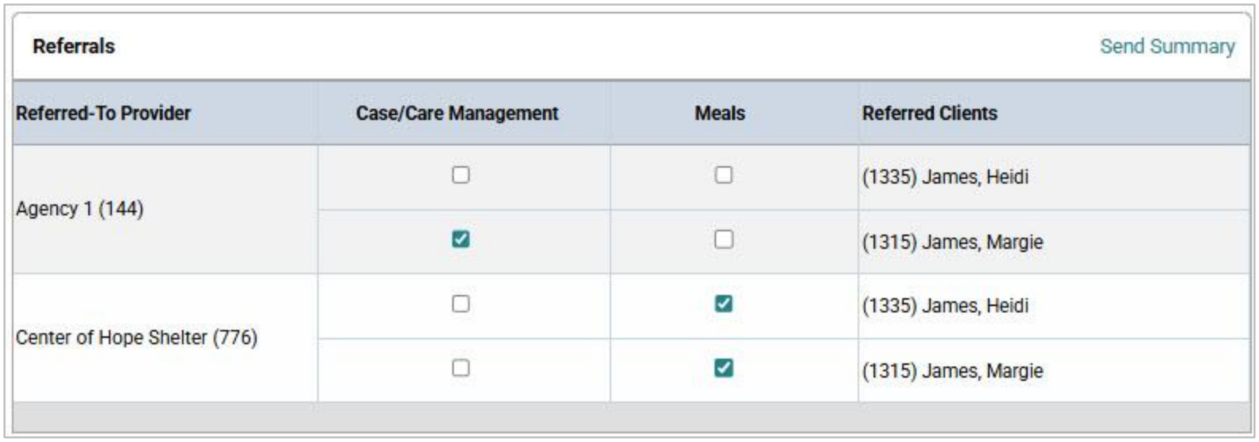
3. The date and time default to the current system date or the back date.

4. Select one or more providers from the Referral Provider Quicklist, then click **Add Provider**.

5. In the Needs Assignment section, select up to five services from the Service Code Quicklist. If the service is not listed, click **Service Code Look-Up** and select the service. For more information see Look Up.

6. Click **Add Terms & Go To Search Results**, which are displayed at the bottom of the screen.

7. Select the service and provider combination for each need. In this example, Margie is the Head of Household with her daughter, Heidi. Margie needs Case/Care Management, and they both need meals.

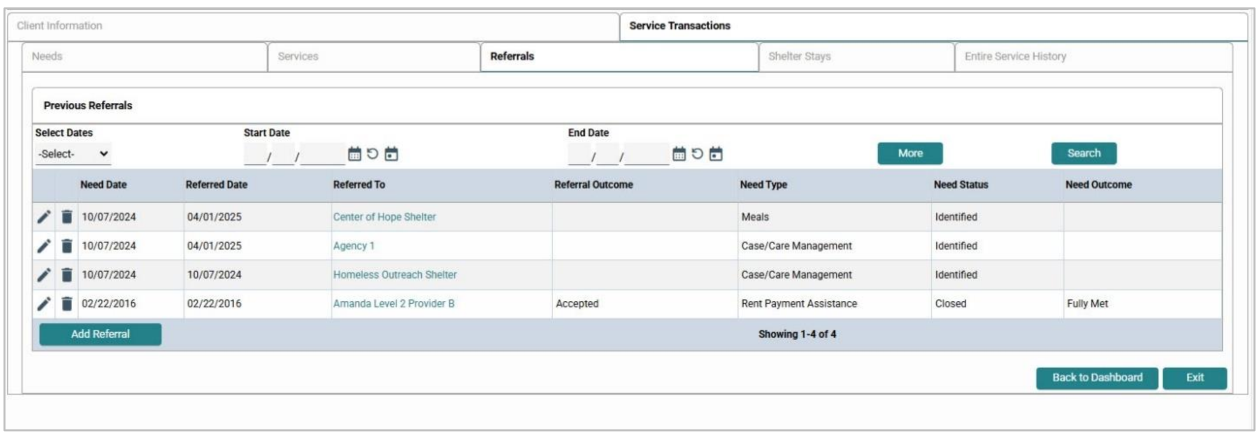


Referrals — Send Summary

Referred-To Provider	Case/Care Management	Meals	Referred Clients
Agency 1 (144)	☐	☐	(1335) James, Heidi
	☑	☐	(1315) James, Margie
Center of Hope Shelter (776)	☐	☑	(1335) James, Heidi
	☐	☑	(1315) James, Margie

8. Click **Save All**.

    a. A Referral Summary is displayed.



Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
10/07/2024	04/01/2025	Center of Hope Shelter		Meals	Identified	
10/07/2024	04/01/2025	Agency 1		Case/Care Management	Identified	
10/07/2024	10/07/2024	Homeless Outreach Shelter		Case/Care Management	Identified	
02/22/2016	02/22/2016	Amanda Level 2 Provider B	Accepted	Rent Payment Assistance	Closed	Fully Met

View service history

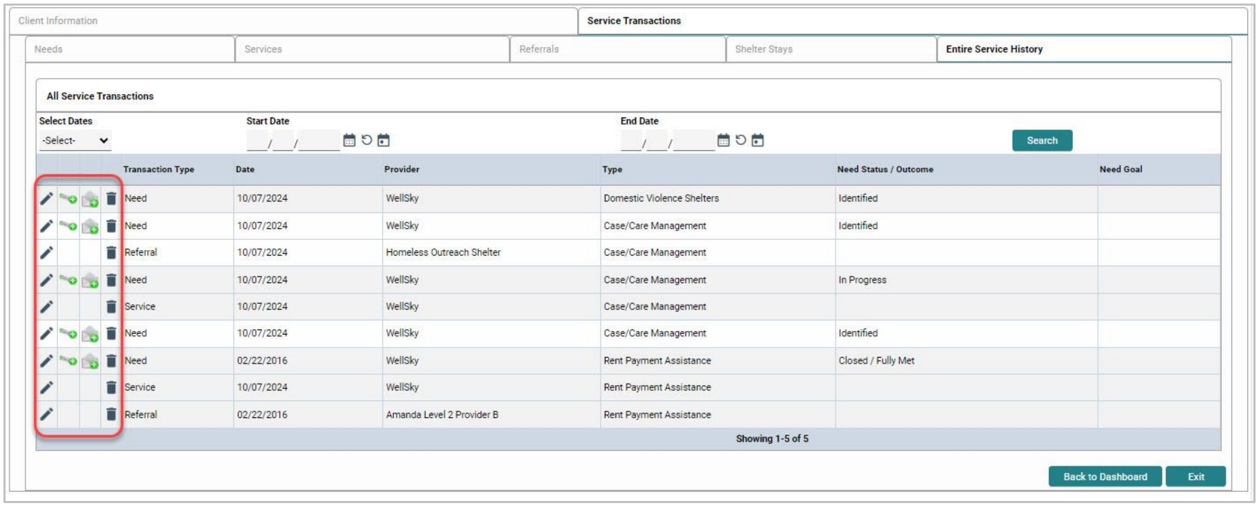
You can view a complete list of the client's service history, including needs, services, and referrals. You can also add services and referrals and delete items, if needed.

1. From the Service Transactions tab, click **Entire Service History**.

a. To edit a record, click **Edit** (Pencil icon).

b. To add a service, click **Add Service** (Key icon).

c. To add a referral, click **Add Referrals** (Envelope icon).

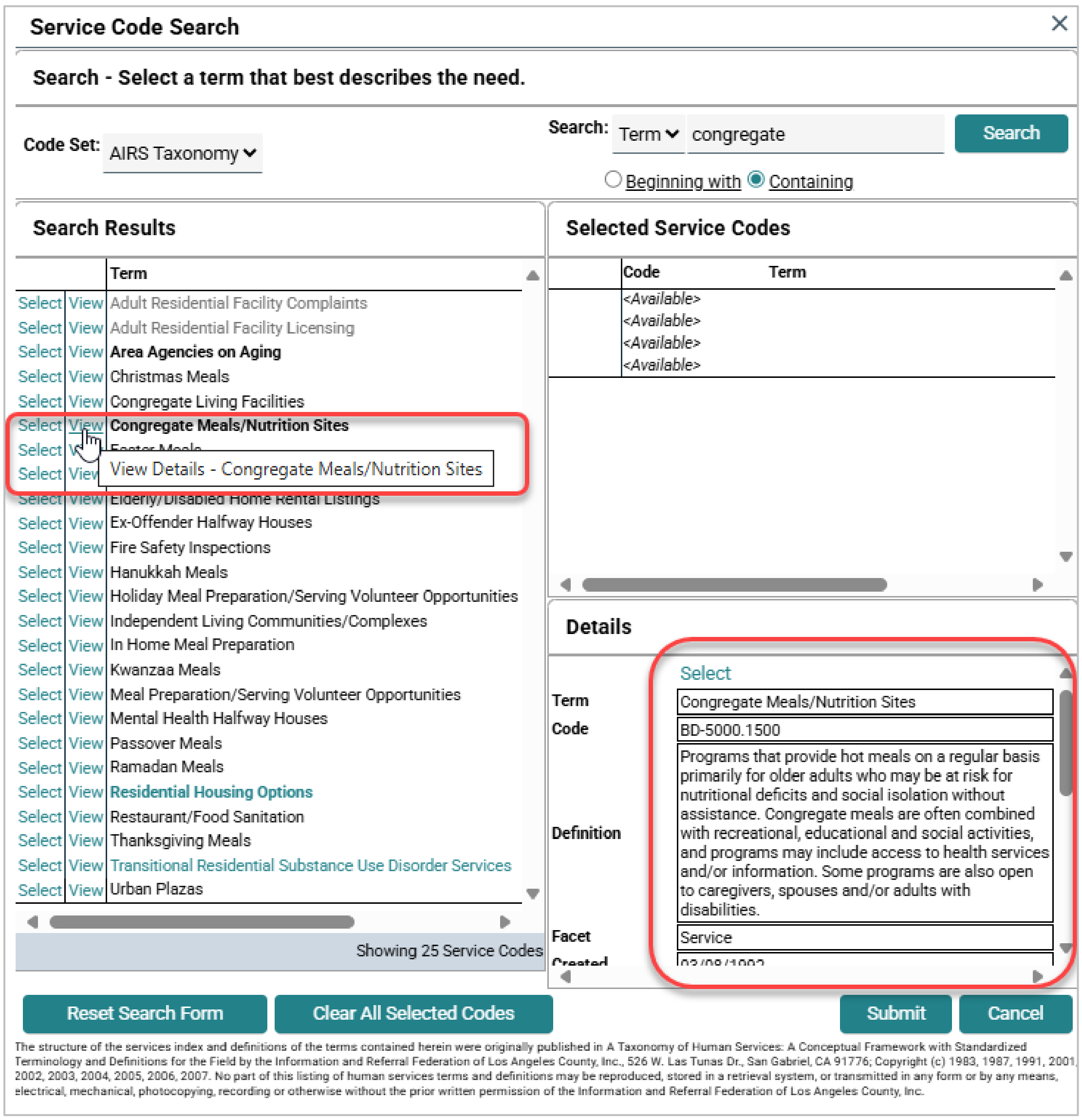


Look Up

1. If you don't see the option you need in the Quick List, click **Look Up** (or similar wording).

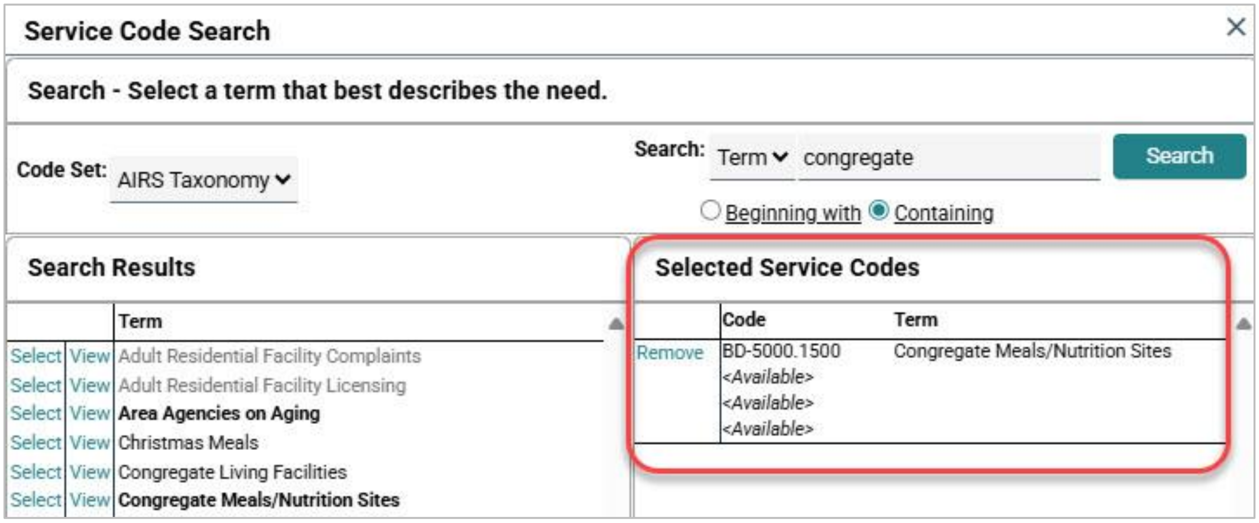
2. Enter search criteria. You can search by taxonomy code or keyword.

3. To view details about a taxonomy code, in the Search Results section, click **View** to display information on the right side of the Service Code Search section.



4. To select the taxonomy code, click **Select** in the Search Results column or, if you're viewing information about the code, click **Select** in the Details section.

5. The code is displayed in the Selected Codes section. Up to five codes can be selected.



TIP – Terms that are displayed in green are links. Click a link to drill down to the next level of taxonomy detail.

6. When you're finished, click **Submit**.

Version Control

Date	Changes
4/4/25	Updated to CS5.16.00