



Community Services

Service Transactions Workflow

Version #CS5.16.00

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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.

Client Results								
	ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	1315	James, Margie	111-11-1111	02/22/1982				1 
Showing 1-1 of 1								

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

Client - (1315) James, Margie

(1315) James, Margie
Release of Information: Ends 10/06/2025

Switch to Another Household Member Submit

Client Information

Service Transactions

Service Transaction Dashboard

Add Need

Add Service

Add Multiple Services

Add Referrals

Eligibility Search

View Previous Service Transactions

View Shelter Stays

View Entire Service History

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

Add Need

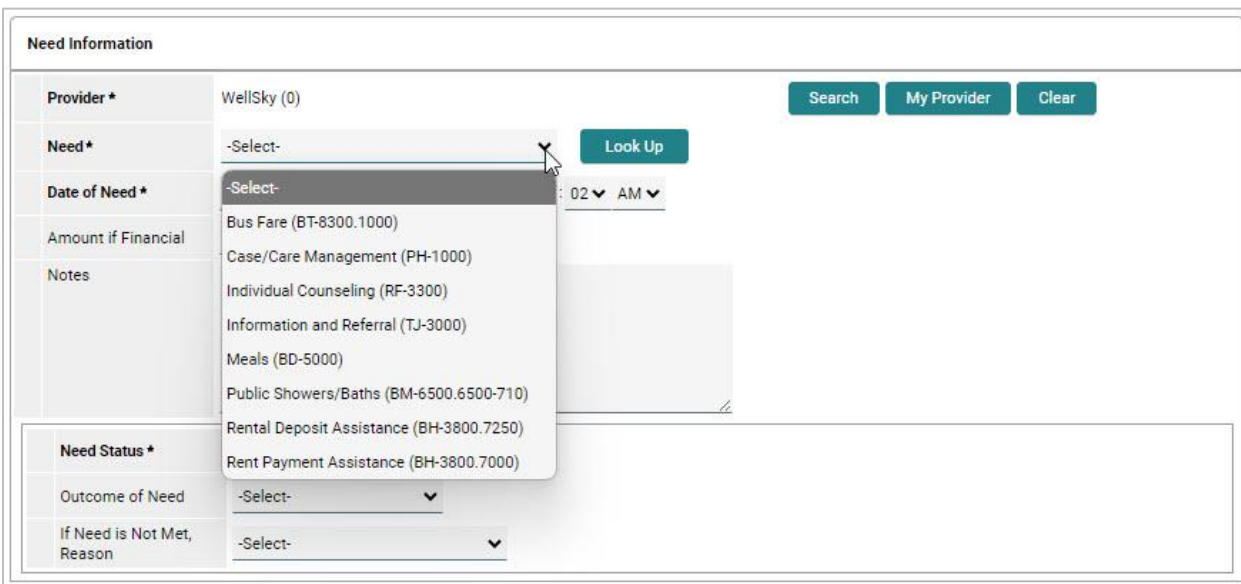
Household Members

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

☐ (376) Female Single Parent
☐ (1315) James, Margie
☒ (1335) James, Heidi

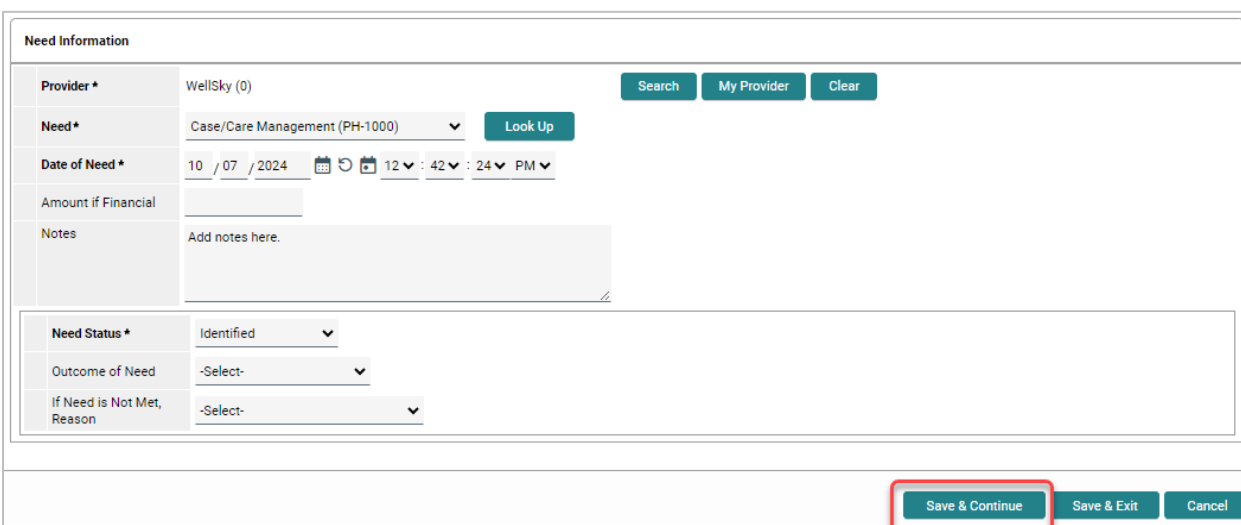
6. The provider automatically defaults to the provider with which your user account is associated. To change the provider in the Need Information section, click **Search** next to the Provider field and select a different provider.
7. Click the arrow in the Need field and select the need. This list is managed by your administrator.

- a. If the need is not listed, click **Look Up**. For more information, see [Look Up](#).



The screenshot shows the 'Need Information' form. The 'Provider *' field is set to 'WellSky (0)'. The 'Need *' dropdown menu is open, displaying a list of services: Bus Fare (BT-8300.1000), Case/Care Management (PH-1000), Individual Counseling (RF-3300), Information and Referral (TJ-3000), Meals (BD-5000), Public Showers/Baths (BM-6500.6500-710), Rental Deposit Assistance (BH-3800.7250), and Rent Payment Assistance (BH-3800.7000). The 'Date of Need *' field is set to '10 / 07 / 2024'. The 'Amount if Financial' field is empty. The 'Notes' field is empty. The 'Need Status *' dropdown is set to '-Select-'. The 'Outcome of Need' dropdown is set to '-Select-'. The 'If Need is Not Met, Reason' dropdown is set to '-Select-'. There are buttons for 'Search', 'My Provider', 'Clear', and 'Look Up'.

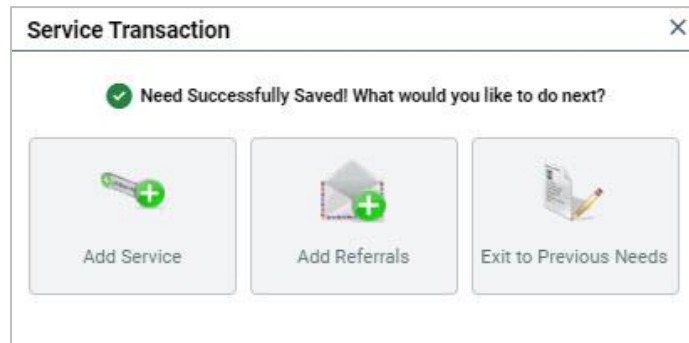
8. Edit the Date of Need, if necessary.
9. If the need is monetary, enter the amount in the Amount if Financial field.
10. Add notes, if needed.
11. Click **Save & Continue** to save the need.



The screenshot shows the 'Need Information' form with the 'Need *' dropdown set to 'Case/Care Management (PH-1000)'. The 'Date of Need *' field is set to '10 / 07 / 2024'. The 'Amount if Financial' field is empty. The 'Notes' field contains the text 'Add notes here.'. The 'Need Status *' dropdown is set to 'Identified'. The 'Outcome of Need' dropdown is set to '-Select-'. The 'If Need is Not Met, Reason' dropdown is set to '-Select-'. At the bottom right, the 'Save & Continue' button is highlighted with a red box. Other buttons include 'Search', 'My Provider', 'Clear', 'Look Up', 'Save & Exit', and 'Cancel'.

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.

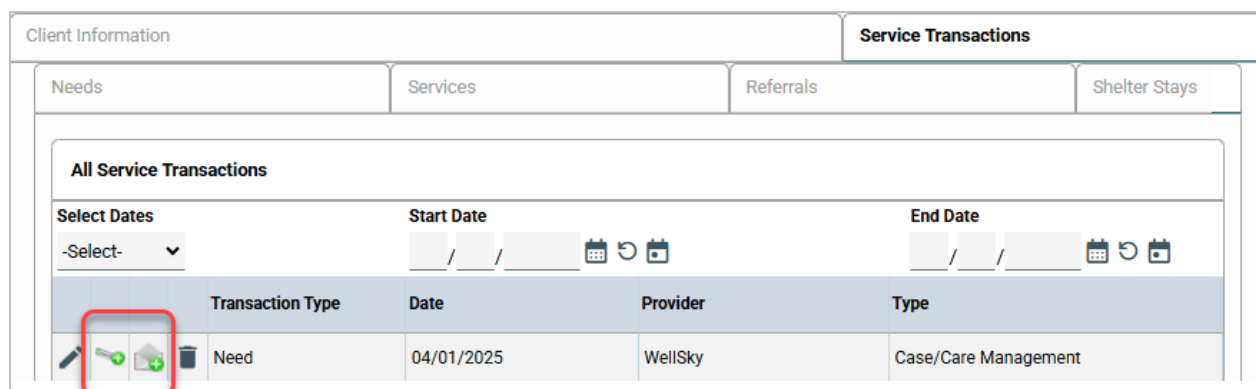


Add a service

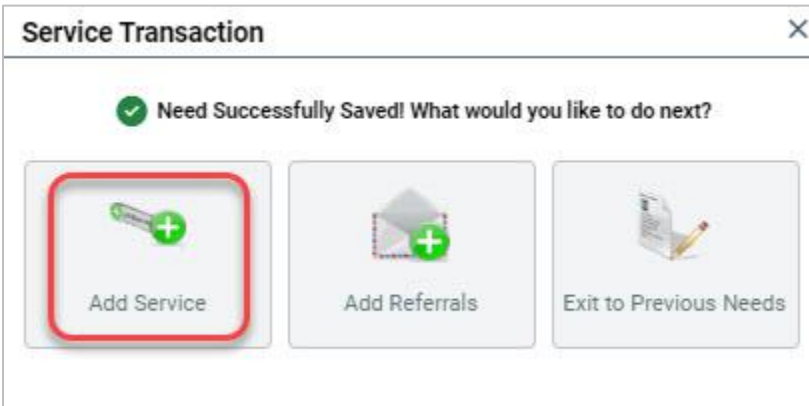
After a need has been identified, a service can be added to address the need.

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:

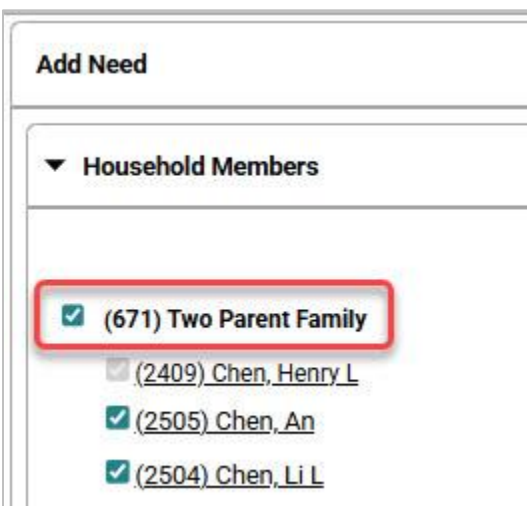
1. Open the client record.
2. Click the **Service Transactions** tab.
3. Click **View Entire Service History**.
4. In the Transaction Type column, locate the need.
5. Click either the **Add Service** or **Add Referral** icons.
6. Follow the steps in the relevant section of this document.



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.

Provider Search

Provider Search

Search for Providers by using keywords from the Provider Name or Description.

Search

Show Advanced Options

Search

Clear

Provider Number

Enter or scan a Provider ID number to search for that Provider.

Provider ID #

Submit

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
	Provider								Level	Phone	Location	Last Updated															
+	2-1-1 with Centralized Intake (40)								Level 1	Unknown	Phoenix, AZ 85020	11/25/2024															
+	7.19.19 GS Provider (667)								Level 2	Unknown	Shreveport, LA 71101	05/17/2023															

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**.

Add Service

▼ Household Members

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

☒ (376) Female Single Parent

☐ (1315) James, Marile (Primary Client)

☒ (1335) James, Heidi

Service Provider* WellSky (0) Search My Provider Clear

Creating User: Leslie Ritchie

Start Date* 10 / 07 / 2024 📅 🕒 1 : 00 : 22 PM ▼

End Date 10 / 07 / 2024 📅 🕒 1 : 00 : 22 PM ▼

Service Type* Case/Care Management (PH-1000) Look Up

Provider Specific Service -Select- ▼

Save & Continue Cancel

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.

Service Costs

Number of Units	4
Unit Type	30 minutes ▼
Cost per Unit	\$ 25.00
Total Cost of Units	\$100.00

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

▼ Apply Funds for Service

Distribute as Voucher
☐ Yes
☒ No

Vendor's Client Account Number

Name on Bill

James, Margie

Vendor

(7) Agency

Search

Clear

Code for Accounting Department

-Select- ▼

Funding Sources

Source	Amount
Client Co-Pay	\$ 5.00

Add Funding Source

Add Other Contributing Sources

Calculate

Total: \$5.00

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

Support Documentation

Date Added	Name	Description	Type
<div>Add Support Documentation</div> <div>No matches.</div>			

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

Upload Support Documentation

Name *

Choose File

Legal Statement.pdf












Description




Add a description here.




Upload

Cancel

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**.

Follow Up Information	
Projected Follow Up Date	10 / 17 / 2024   
Follow Up User	WellSky (0)    Kristy Hudson 
Follow Up Made	-Select- 
Completed Follow Up Date	__ / __ / __   

Need Information	
Need Status *	In Progress 
Outcome of Need	-Select- 
If Need is Not Met, Reason	-Select- 

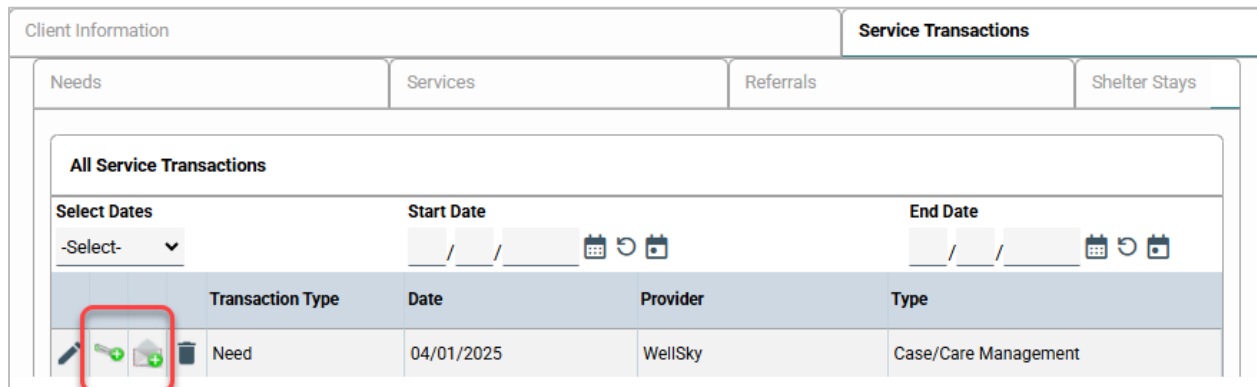
  

Add a referral




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.

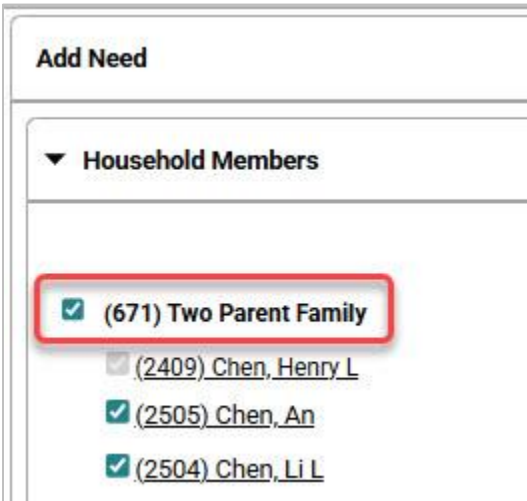


The screenshot displays the 'Service Transactions' section of a client record. It features a tabbed interface with 'Needs', 'Services', 'Referrals', and 'Shelter Stays'. The 'All Service Transactions' table is visible, showing a transaction with the type 'Need' on '04/01/2025' by 'WellSky'. A red box highlights the 'Add Referral' icon (a green plus sign) in the action column of this transaction row.

Client Information		Service Transactions											
Needs	Services	Referrals	Shelter Stays										
All Service Transactions													
Select Dates -Select- ▼		Start Date / /	End Date / /										
<table border="1"><thead><tr><th></th><th>Transaction Type</th><th>Date</th><th>Provider</th><th>Type</th></tr></thead><tbody><tr><td></td><td>Need</td><td>04/01/2025</td><td>WellSky</td><td>Case/Care Management</td></tr></tbody></table>					Transaction Type	Date	Provider	Type		Need	04/01/2025	WellSky	Case/Care Management
	Transaction Type	Date	Provider	Type									
	Need	04/01/2025	WellSky	Case/Care Management									

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.



Add Need

▼ **Household Members**

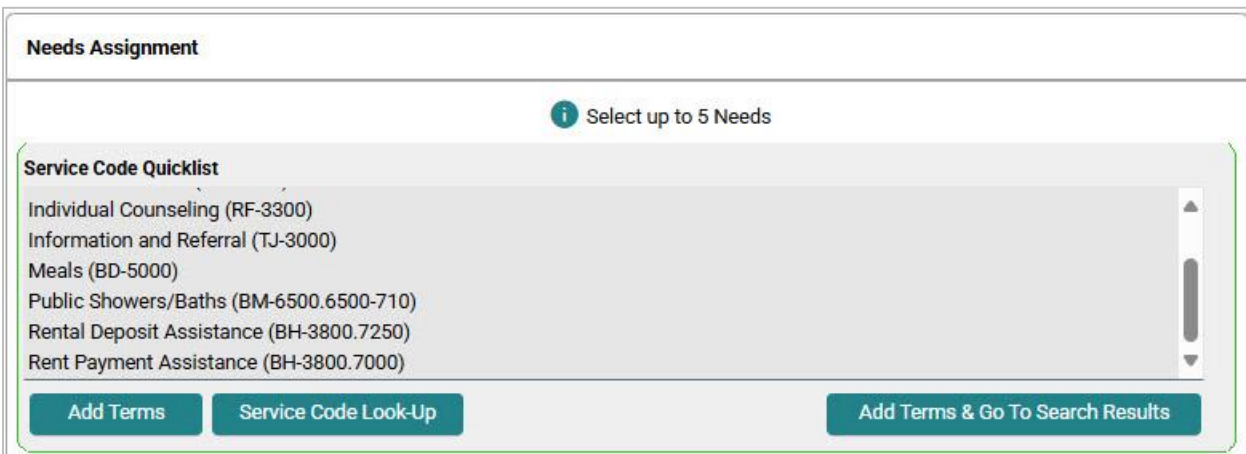
☒ **(671) Two Parent Family**

☐ (2409) Chen, Henry L

☒ (2505) Chen, An

☒ (2504) Chen, Li L

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.



Needs Assignment

i Select up to 5 Needs

Service Code Quicklist

- Individual Counseling (RF-3300)
- Information and Referral (TJ-3000)
- Meals (BD-5000)
- Public Showers/Baths (BM-6500.6500-710)
- Rental Deposit Assistance (BH-3800.7250)
- Rent Payment Assistance (BH-3800.7000)

Add Terms **Service Code Look-Up** **Add Terms & Go To Search Results**

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)	<input type="checkbox"/>	<input type="checkbox"/>	(1335) James, Heidi
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(1315) James, Margie
Center of Hope Shelter (776)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	(1335) James, Heidi
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	(1315) James, Margie

8. Click **Save All**.
 - a. A Referral Summary is displayed.

Client Information

Service Transactions

Needs

Services

Referrals

Shelter Stays

Entire Service History

Previous Referrals

Select Dates

-Select-

Start Date

End Date

More

Search

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

Add Referral

Showing 1-4 of 4

Back to Dashboard

Exit

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**.

- To edit a record, click **Edit** (Pencil icon).
- To add a service, click **Add Service** (Key icon).
- To add a referral, click **Add Referrals** (Envelope icon).

Client Information

Service Transactions

Needs

Services

Referrals

Shelter Stays

Entire Service History

All Service Transactions




























Select Dates

Start Date

End Date

-Select-

Search

Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
   Need	10/07/2024	WellSky	Domestic Violence Shelters	Identified	
   Need	10/07/2024	WellSky	Case/Care Management	Identified	
   Referral	10/07/2024	Homeless Outreach Shelter	Case/Care Management		
   Need	10/07/2024	WellSky	Case/Care Management	In Progress	
   Service	10/07/2024	WellSky	Case/Care Management		
   Need	10/07/2024	WellSky	Case/Care Management	Identified	
   Need	02/22/2016	WellSky	Rent Payment Assistance	Closed / Fully Met	
   Service	10/07/2024	WellSky	Rent Payment Assistance		
   Referral	02/22/2016	Amanda Level 2 Provider B	Rent Payment Assistance		

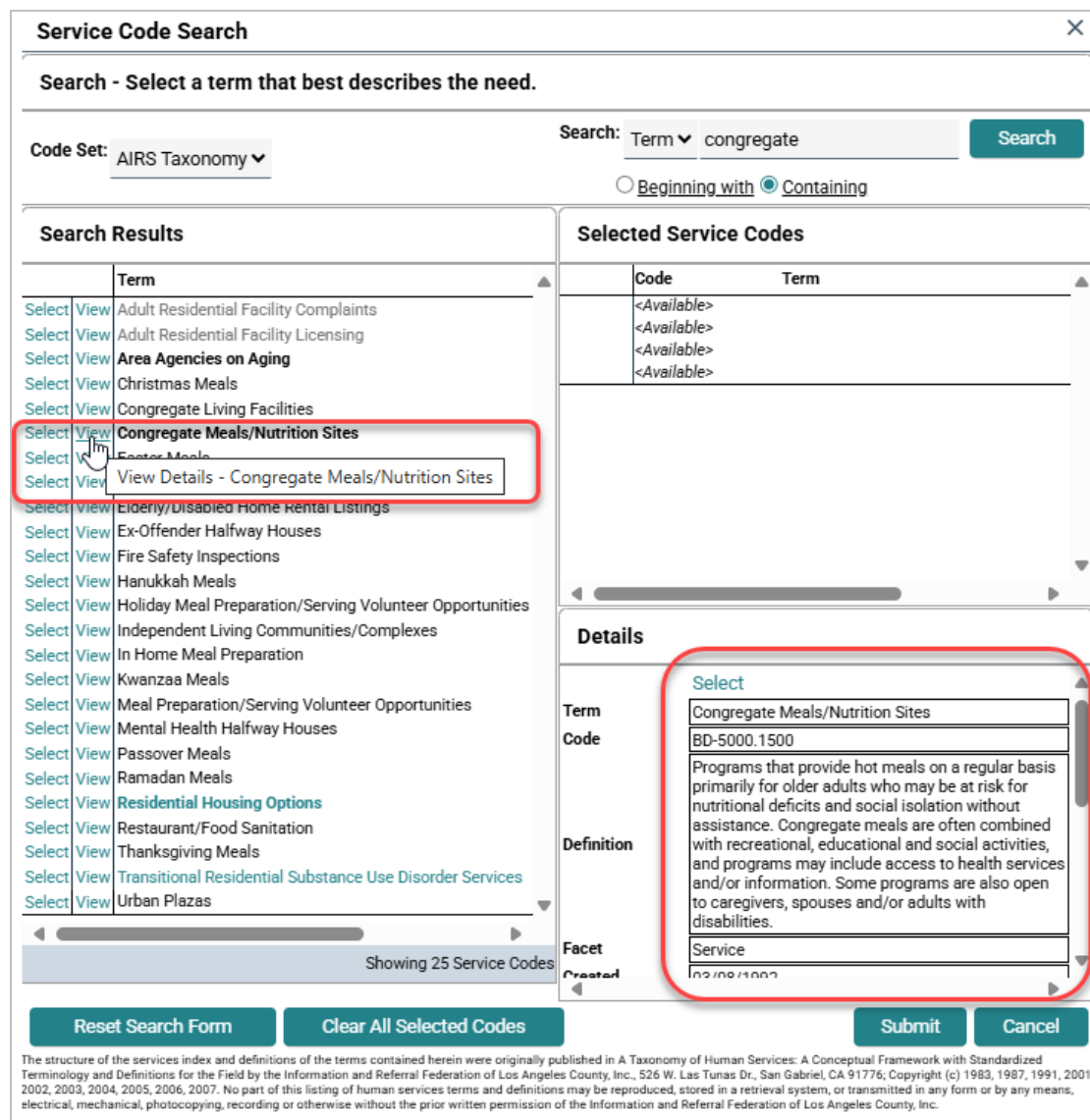
Showing 1-5 of 5

Back to Dashboard

Exit

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.



Service Code Search

Search - Select a term that best describes the need.

Code Set: **AIRS Taxonomy** Search: Term **congregate** Search

☐ Beginning with ☒ Containing

Search Results		Selected Service Codes	
	Term	Code	Term
Select View	Adult Residential Facility Complaints	<Available>	
Select View	Adult Residential Facility Licensing	<Available>	
Select View	Area Agencies on Aging	<Available>	
Select View	Christmas Meals	<Available>	
Select View	Congregate Living Facilities		
Select View	Congregate Meals/Nutrition Sites		
Select View	Elder Meals		
Select View	View Details - Congregate Meals/Nutrition Sites		
Select View	Elderly/Disabled Home Rental Listings		
Select View	Ex-Offender Halfway Houses		
Select View	Fire Safety Inspections		
Select View	Hanukkah Meals		
Select View	Holiday Meal Preparation/Serving Volunteer Opportunities		
Select View	Independent Living Communities/Complexes		
Select View	In Home Meal Preparation		
Select View	Kwanzaa Meals		
Select View	Meal Preparation/Serving Volunteer Opportunities		
Select View	Mental Health Halfway Houses		
Select View	Passover Meals		
Select View	Ramadan Meals		
Select View	Residential Housing Options		
Select View	Restaurant/Food Sanitation		
Select View	Thanksgiving Meals		
Select View	Transitional Residential Substance Use Disorder Services		
Select View	Urban Plazas		

Showing 25 Service Codes

Details

Select

Term: Congregate Meals/Nutrition Sites

Code: BD-5000.1500

Definition: Programs that provide hot meals on a regular basis primarily for older adults who may be at risk for nutritional deficits and social isolation without assistance. Congregate meals are often combined with recreational, educational and social activities, and programs may include access to health services and/or information. Some programs are also open to caregivers, spouses and/or adults with disabilities.

Facet: Service

Created: 10/2/19 11:00:00

Reset Search Form Clear All Selected Codes Submit Cancel

The structure of the services index and definitions of the terms contained herein were originally published in A Taxonomy of Human Services: A Conceptual Framework with Standardized Terminology and Definitions for the Field by the Information and Referral Federation of Los Angeles County, Inc., 526 W. Las Tunas Dr., San Gabriel, CA 91776; Copyright (c) 1983, 1987, 1991, 2001, 2002, 2003, 2004, 2005, 2006, 2007. No part of this listing of human services terms and definitions may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electrical, mechanical, photocopying, recording or otherwise without the prior written permission of the Information and Referral Federation of Los Angeles County, Inc.

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.

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

Service Code Search

Search - Select a term that best describes the need.

Code Set: AIRS Taxonomy

Search: Term

congregate

Search

Beginning with

Containing

Search Results

	Term
Select View	Adult Residential Facility Complaints
Select View	Adult Residential Facility Licensing
Select View	Area Agencies on Aging
Select View	Christmas Meals
Select View	Congregate Living Facilities
Select View	Congregate Meals/Nutrition Sites

Selected Service Codes

	Code	Term
Remove	BD-5000.1500	Congregate Meals/Nutrition Sites
	<Available>	
	<Available>	
	<Available>	

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

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



Version Control

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