

Service Transactions

April 2026



NC COALITION to end
HOMELESSNESS

Presentation Agenda

- ✓ Service Transactions Overview
- ✓ Creating a Service Transaction
- ✓ Creating a Need
- ✓ Reporting
- ✓ Resources



Service Transactions Overview

- Electronic recording of a specific service provided to a client or household, such as a rental assistance, case management, etc.
- Documenting these transactions allows service providers to track client interactions, generate reports for funders, and gain insights into service delivery to better combat homelessness.
- For Program Managers and Case Managers looking for ways to better track Supportive Services, especially for those interested in applying for CoC NOFO funds.



Creating a Service Transaction

Steps for Creating Service Transactions

- Service Transactions include identifying the client's needs, the services and providers who can meet the needs, and creating referrals to providers for services
- Set "Enter Data As" mode
- Set "Back Date" mode
- Search for Client
- Navigate to their "Service Transactions" tab

Client Information

Service Transactions

Service Transaction Dashboard


Add Need


Add Service


Add Multiple Services


Add Referrals


View Previous Service Transactions


View Shelter Stays


View Entire Service History

Steps for Creating Service Transactions

Client Information

1

Service Transactions

2

Services

Referrals

Shelter Stays

Entire Service History

Previous Services

Select Dates

-Select-

Start Date

End Date

Search

Service Start Date	Service End Date	HPRP Housing Relocation & Stabilization Service Provided	HPRP Financial Assistance Type	Provider of Service	Service Type
3 Add Service Add Multiple Services					
No matches.					

Back to Dashboard

Exit

Steps for Creating Service Transactions

Client Information

Service Transactions

Add Service

▼ Household Members

i

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

4

☒

(2) Two Parent Family (married w/children)

☒

(7) [hhousing, Edward](#)

☐

(5) [hhousing, Joseph](#) (Primary Client)

☒

(6) [hhousing, Sarah](#)

Service Provider *

North Carolina Coalition to End Homelessness (2)

Search

My Provider

Clear

Creating User

Rachelle Dugan

Start Date *

04 / 14 / 2026

2

:

00

:

00

AM

End Date

04 / 14 / 2026

2

:

00

:

00

AM

5 Service Type *

Case/Care Management (PH-1000)

Look Up

Provider Specific Service

-Select-

6

Save & Continue

Cancel

NCCEH

Steps for Creating Service Transactions

Service Provider *	 North Carolina Coalition to End Homelessness (2)
Creating User	Rachelle Dugan
Start Date *	04 / 14 / 2026    2 : 00 : 00 AM
End Date	04 / 14 / 2026    2 : 00 : 00 AM
Service Type *	 Case/Care Management (PH-1000)
Provider Specific Service	-Select- ▾
7 Service Notes	Met with Client to update Case Plan and Goals (Optional)

Service Costs

8 Number of Units	1
9 Unit Type	hrs ▾
Cost per Unit	\$
Total Cost of Units	

- The Service Costs section can be used to track Staff Time, Money spent on rent or other needs, etc.
- The Total Cost of Units is calculated automatically.

Steps for Creating Service Transactions

Support Documentation **Optional**

10 Add Support Documentation

Follow Up Information

Projected Follow Up Date / /

Follow Up User North Carolina Co Homelessness (2 -Select-

Upload Support Documentation

Name * 11 Choose File No file chosen

Description

12 Upload Cancel

No matches.

- Uploading an attachment is a great way to store documents containing Personally Identifiable Information
 - Examples: Leases, Utility Bills/Payment Receipts, etc.

Steps for Creating Service Transactions

Support Documentation

Date Added	Name	Description	Type
Add Support Documentation		No matches.	

Follow Up Information

Projected Follow Up Date

Follow Up User

North Carolina Coalition to End Homelessness (2)

Search

My Provider

Clear

-Select-

Follow Up Made

-Select-

Completed Follow Up Date

> Optional Section

Need Information

13 Need Status *

Closed

14 Outcome of Need

Fully Met

If Need is Not Met, Reason

-Select-

15

Save

Save & Exit

Exit



The background of the image is a solid teal color, overlaid with a repeating pattern of white line-art icons. These icons represent various types of buildings, including houses, multi-story apartment or office buildings, and industrial structures like factories with smokestacks. Some icons also include small trees or clouds. The pattern is dense and covers the entire background.

Reporting Services

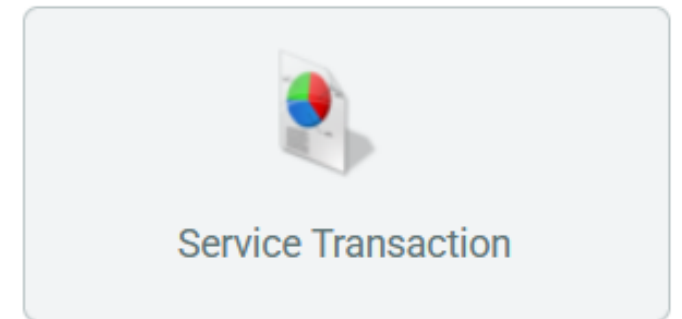
Service Transaction Dashboard Report

Navigation Path: Reports > Service Transactions

- Used to monitor the services provided and recorded by the project within HMIS.

- Can be accessed by all HMIS users

**Contains Client Personally Identifiable Information*



Service Transaction Dashboard Report

Report Options

Provider *

Heading Home - Rowan County
- Emergency Shelter (7389)

Search

My Provider

Clear

Provider Search Type *

The selected provider ONLY

▼

Services *

☐ Needs Entered by my provider

☒ Services Provided by my provider (Non-shelter stays)

☒ Shelter Stays provided by my provider

☐ Needs Referred to my provider

☐ Referrals Made by my provider

Service Code

Case/Care Management Referrals (PH-2400.1300)

Choose Service Code

Clear

Need Date Range

Service Provided Date Range

10

01

2025

Need Outcome

-All-

▼

Build Report

Download Results

The logo for NCCEH (North Carolina Children's Emergency Homelessness) features a stylized icon of a house with a chimney and a tree to its left, all enclosed within a rounded square border. Below the icon, the letters "NCCEH" are displayed in a bold, sans-serif font.

Service Transaction Dashboard Report

[Build Report](#)[Download Results](#)

Service Transaction

Need Date	Name	Need Type	Created By	Referred To	Service	Service Provider
10/01/2025	(1070112)	Crisis Residential Treatment	County - Center for Men - ES - State ESG		Crisis Residential Treatment	Center for Men - ES - State ESG
10/01/2025	(1031173)	Inpatient Substance Use Disorder Treatment Facilities	County - Center for Men - ES - State ESG		Inpatient Substance Use Disorder Treatment Facilities	Center for Men - ES - State ESG
10/01/2025	(1031173)	Case/Care Management	County - Center for Men - ES - State ESG		Case/Care Management	Center for Men - ES - State ESG
10/06/2025	(1038587)	Emergency Shelter	County - Center for Men - ES - State ESG		Emergency Shelter	Center for Men - ES - State ESG
10/07/2025	(1070877)	Emergency Shelter	County - Center for Men - ES - State ESG		Emergency Shelter	Center for Men - ES - State ESG
10/07/2025	(1038587)	Food Stamps/SNAP	County - Center for Men - ES - State ESG		Food Stamps/SNAP	Center for Men - ES - State ESG

0347 Billing Summary Report

Navigation Path: Business Objects > Folders > Public Folder > ART Gallery Reports and Resources > ART Gallery Reports > 0347 – Billing Summary

- Report relates to Service Costs section in the Clients Service Transaction
- To streamline agencies billing process and examine billable services by program, service type, client, and case worker.

Title
 0347 - Billing Summary - v3

**Includes Client Personally Identifiable Information*

0347 Billing Summary Report

Prompts

▼

 0347 - Billing Summary - HHT

Edit Prompt Values

EDA Provider	Heading Home - Rowan County - Emergency Shelter(7389)	Constan... ▼
Enter Start Date:	10/1/2025 12:00:00 AM	Constan... ▼
Enter End Date PLUS 1 Day:	4/12/2026 12:00:00 AM	Constan... ▼
Do Not Include Open Servic...	10/1/2025 12:00:00 AM	Constan... ▼
Select Provider(s) for Report:	Heading Home - Rowan County - Emergency Shelter(7389)	Constan... ▼
Select Billable Service Types:	Health Care Referrals; Gas Money; Furniture; Educational Programs; Driver Licenses; Case/Care Management	Constan... ▼

0347 Billing Summary Report– Report Tabs

Tab A - By Project

- Displays total unit costs and Services by project type

Tab B - By Service Type

- Displays total Service cost by service type

Tab C - By Client

- Displays all services provided to each client

Tab D – Detail

- Provides detail on Service Types provided to each client

Tab E - Additional Information

- Includes Reporting Prompts

Reporting/Resources

Business Objects:

- 347 billing report summary

Dashboard Reporting:

- [Dashboard Report: Service Transactions](#)

ZenGuide Resources:

- [Recording Services in HMIS](#)



Contact NCCEH

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NCEndHomelessness 

@NCHomelessness 

nc_end_homelessness 

Contact NCCEH Data Center Help Desk

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NCCEH