Service Transactions
The Data Center at NCCEH
Service Transactions

- Allows agencies to track client engagement
  - Available for any project type
  - Check with funder to see if required
- Track any service in the AIRS code directory
  - Contact the Data Center to make sure the back end settings are complete
HUD RRH requires service transactions

- Services dates must be **after** the entry
- Services end dates must be **before** the exit

**Program Entry**
03/01/16

- 04/11/16 Case Management
- 04/13/16 Housing Search Assistance
- 04/28/16 Rental Payment
- 05/31/16 Case Management

**Program Exit**
06/01/16

**Rental Deposit**
When services take place on one date

For one time services
Case management, rental arrears, utility deposits, security deposits, etc.

Start Date: Date the payment was made
End Date: Same as Start Date

Example
A case manager met with a client on 03/11/2016 for case/care management

Start Date: 03/11/2016
End Date: 03/11/2016
When services cover a date range

For rental and utility payment assistance

Start Date  FIRST day of the month covered by the payment
End Date    LAST day of the month covered by the payment

Example

A payment to cover a client’s rent for the period of January 1, 2016-January 31, 2016 was made on December 28, 2015

Start Date  1/1/2016
End Date    1/31/2016
Service Transactions

Can only be entered between entry and exit
Add household members, dates, and Service Type

<table>
<thead>
<tr>
<th>Household Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>(32) Married Couple (no children)</td>
</tr>
<tr>
<td>✓ (103) Lacks, Henrietta (Primary Client)</td>
</tr>
<tr>
<td>✓ (118) Lacks, David</td>
</tr>
</tbody>
</table>

**Service Provider**: Urban Ministries of Durham - Durham County - Fresh Start II RRH - HUD (7168)

**Start Date**: 11/08/2017 00:00 AM

**End Date**: 11/08/2017 00:00 AM

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

Auto-populates to your EDA mode
Check household members, then scroll down for more details.
These do not apply to your projects – if your agency is interested in using the Billing Summary report or FundManager to track financial assistance, contact the NCCEH Data Center.
Support Documentation

- Optional, but helpful electronic record
- Add File Attachments under Support Documentation
Complete the Service Transaction with Need Information

Does this service require further action in or out HMIS?
• Make sure that if the Need Status is not “Closed” there is a plan to close it
Resources
ncceh.org/hmis
access local support for Balance of State, Durham, & Orange CoCs

919.410.6997 or hmis@ncceh.org
helpdesk for local support