Collaborate. Coordinate. Evaluate.

Service Transactions

BOWMAN systems

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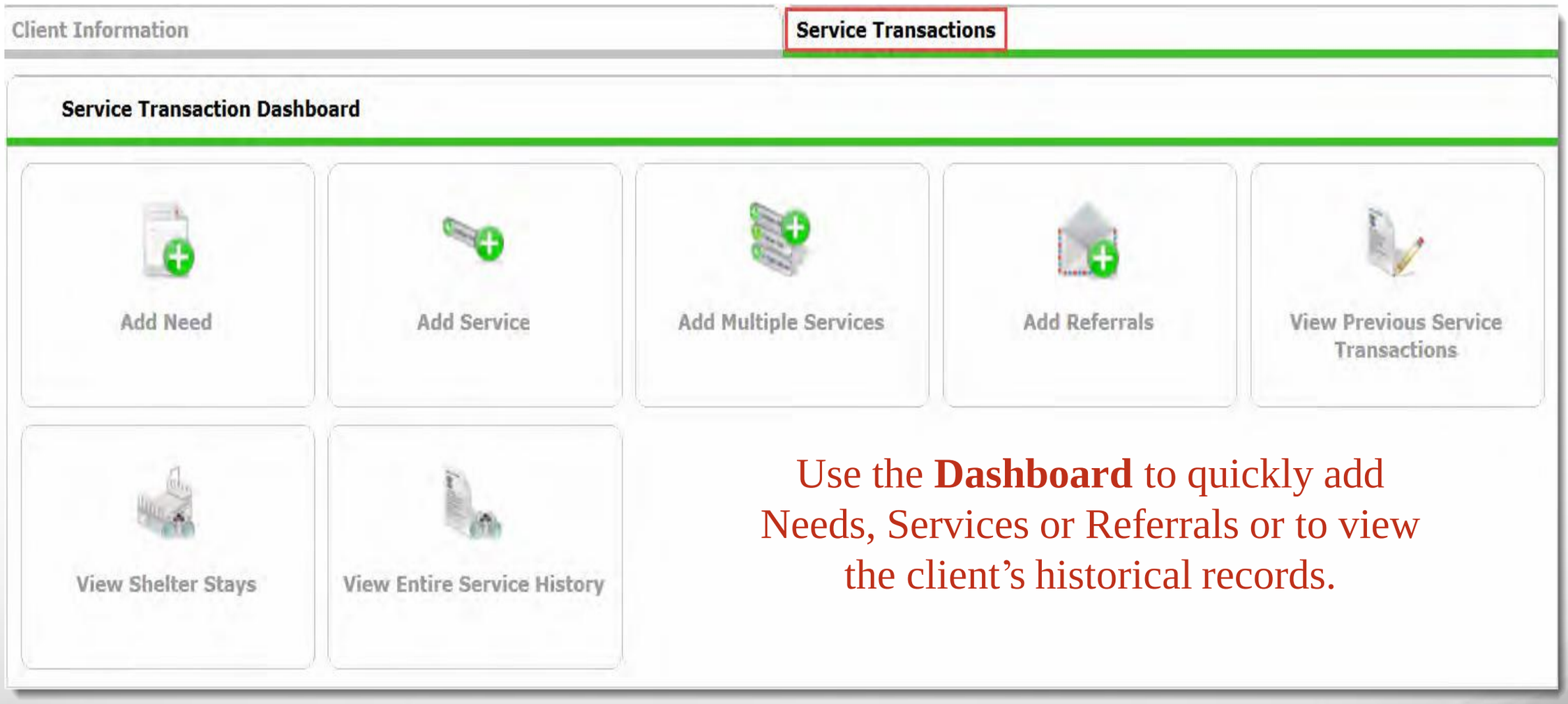
"ServiceTransactions Tab"



Use the **Dashboard** to quickly add Needs, Services or Referrals or to view the client's historical records.

Need → Service → Referral

Things you should know…

- A need must be created in order for the End User to add services or referrals to the Client record.
- Bowman Systems uses 211 LA/AIRS Taxonomy, an indexing system of Health and Social Services
- Taxonomy Term = Service Term = Services rendered by a provider
- Needs will always be the same as the Service Term

  Example :
  - Client's Need = Emergency Shelter,
  - Service Provided = Emergency Shelter
  - If a referral, this would also equal = Emergency Shelter because it is a Service that the receiving agency provides

Collaborate. Coordinate. Evaluate.

Service Transactions/ AIRS Taxonomy

- Each Provider should have a **Quick List** created of the most common needs/ services requested by their clients.
- When a Quick List is not created, users have to "Look-up" service Terms within ServicePoint's pop-up AIRS taxonomy
- Service Terms can be searched within the Search box or by searching within the hierarchy
- Click Select to the left of the taxonomy term
- Click View to view the description of the Service term under details

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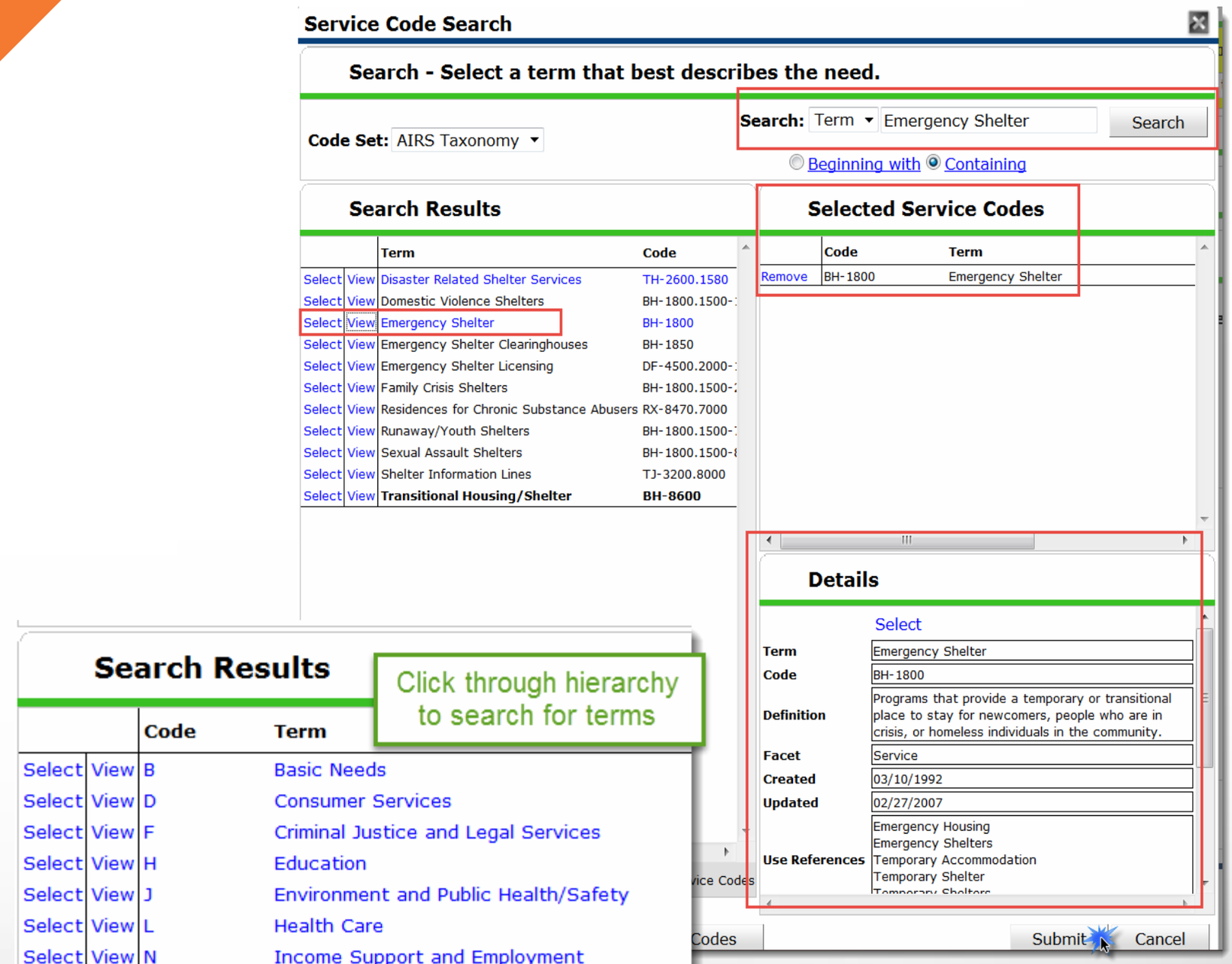
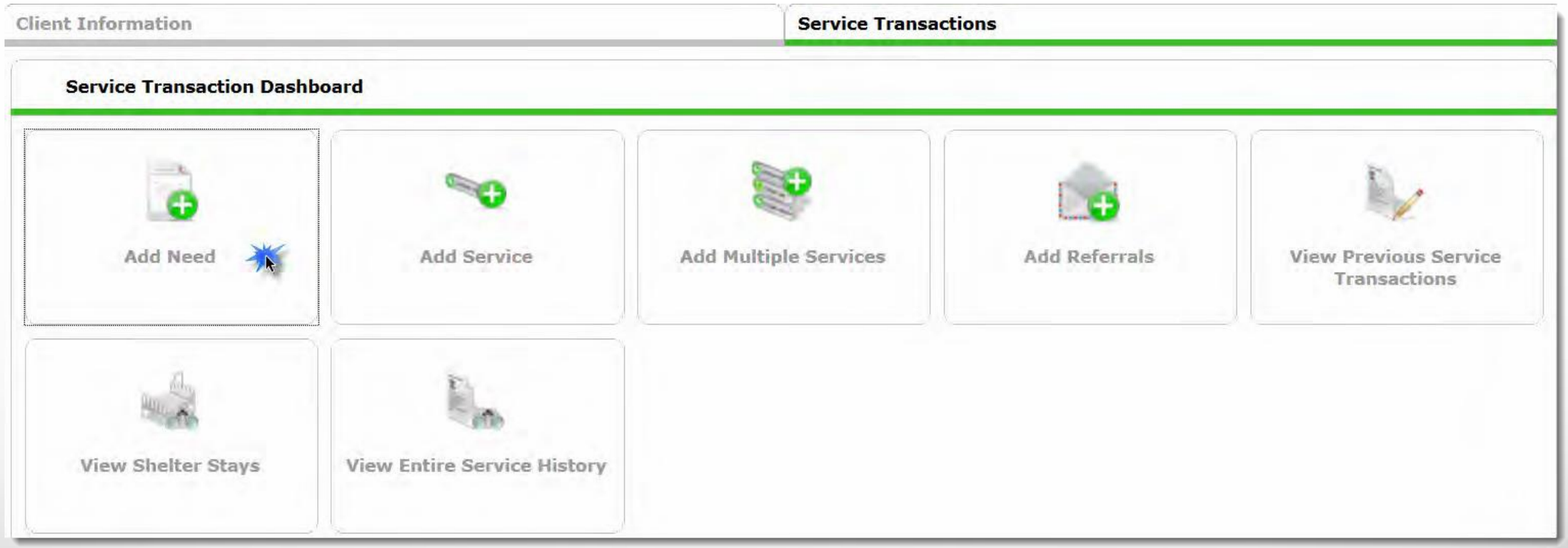


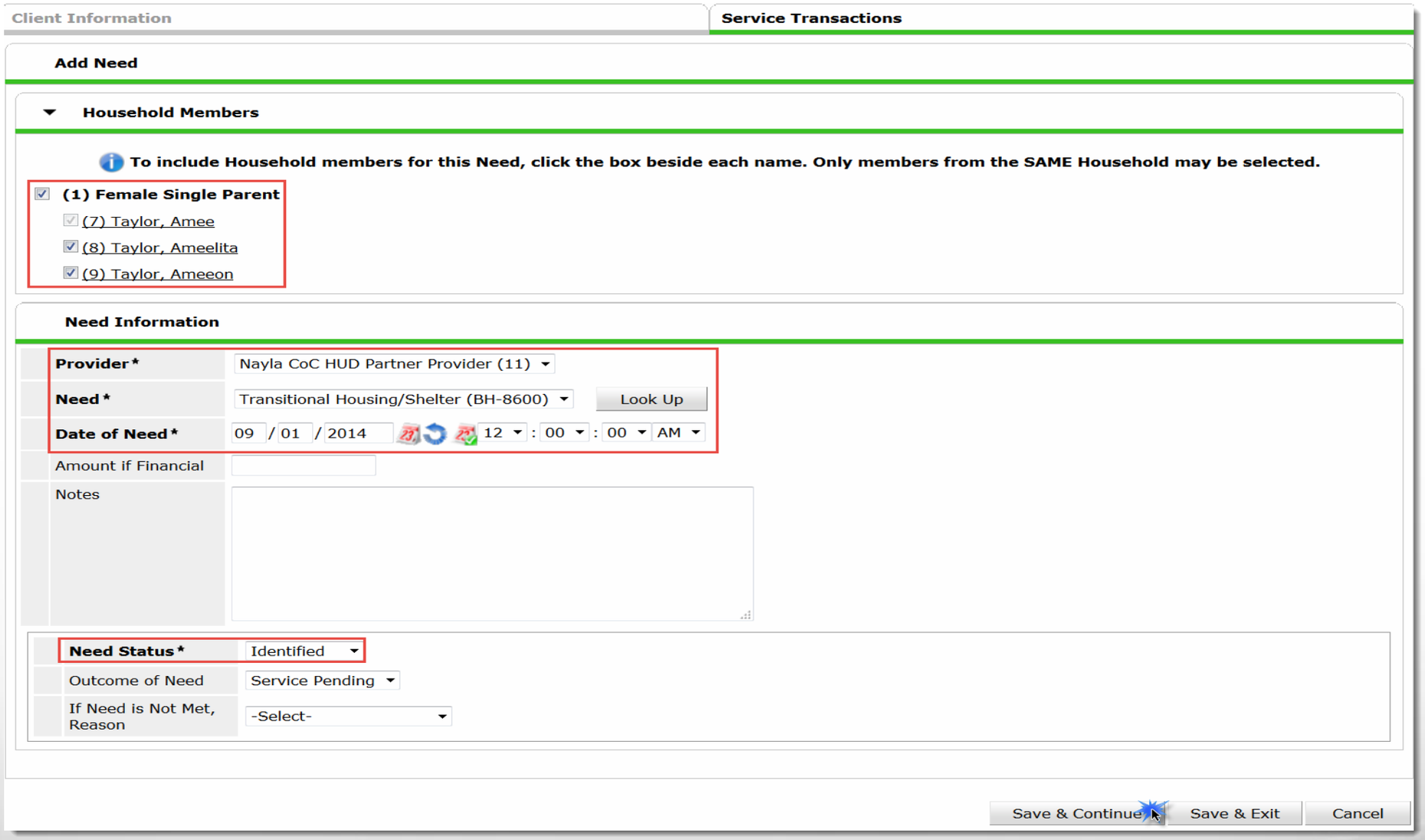
Need

➢If no services or referrals are to be provided and only need(s) are to be recorded, click Add Need



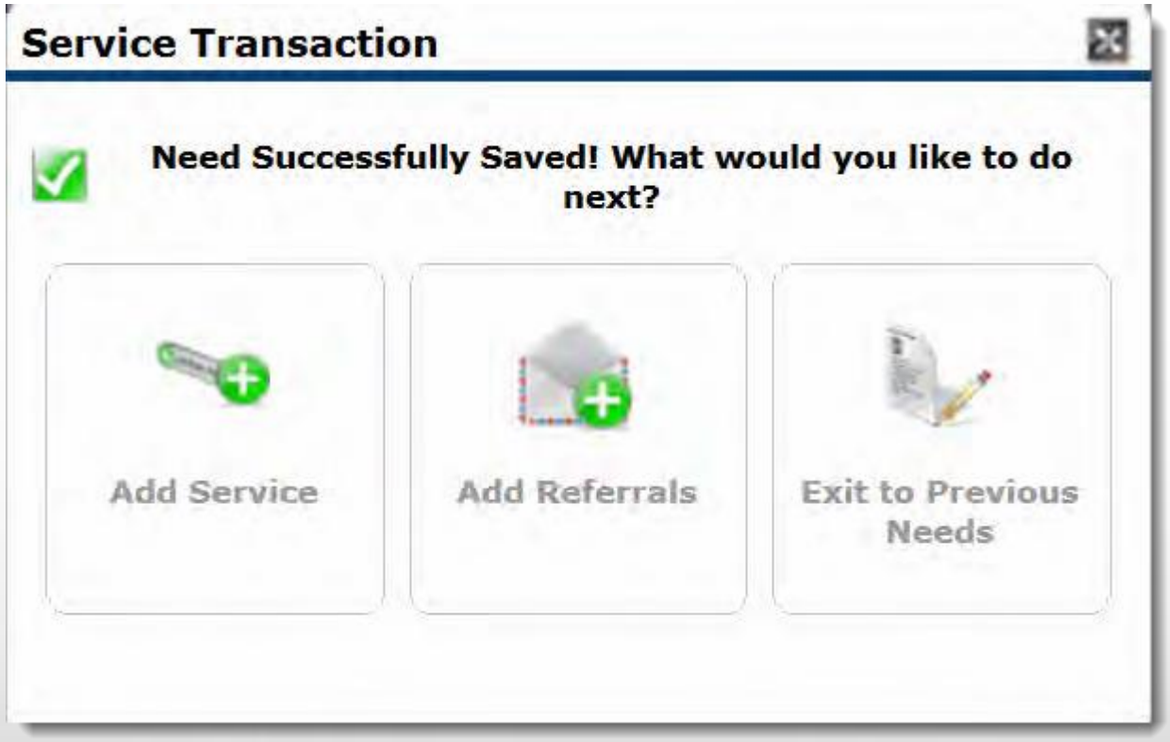
Need

- Select to which household members as necessary
- Select the Need from the quick list or use the Look Up to find a term that best describes the need.
- Click Save & Continue



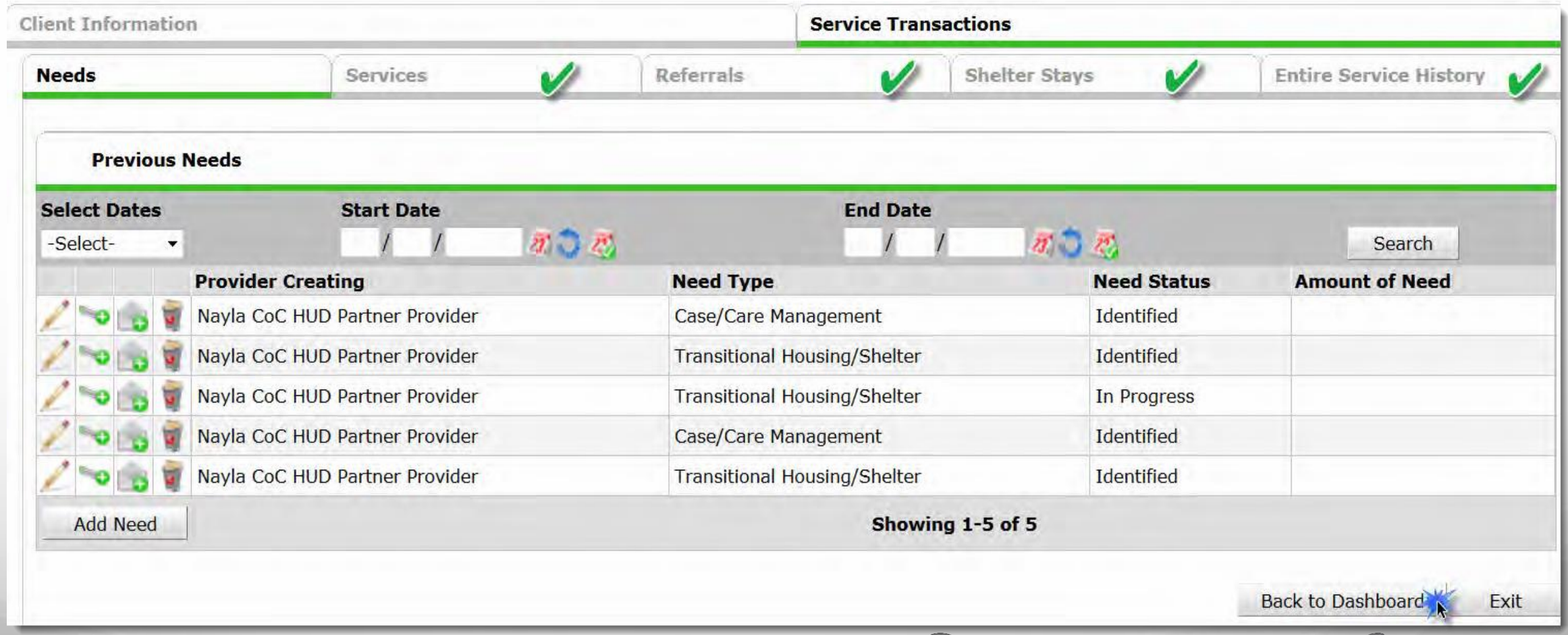
Service Transaction Action Worfklow

- An action window will appear to assist the user with the next data entry step in the process.
- A user could add a Service or Referral (Service and Referral workflows to follow)
- If there is only the need at this time, Click “Exit to Previous Needs” to go to the entire need history (see next slide).



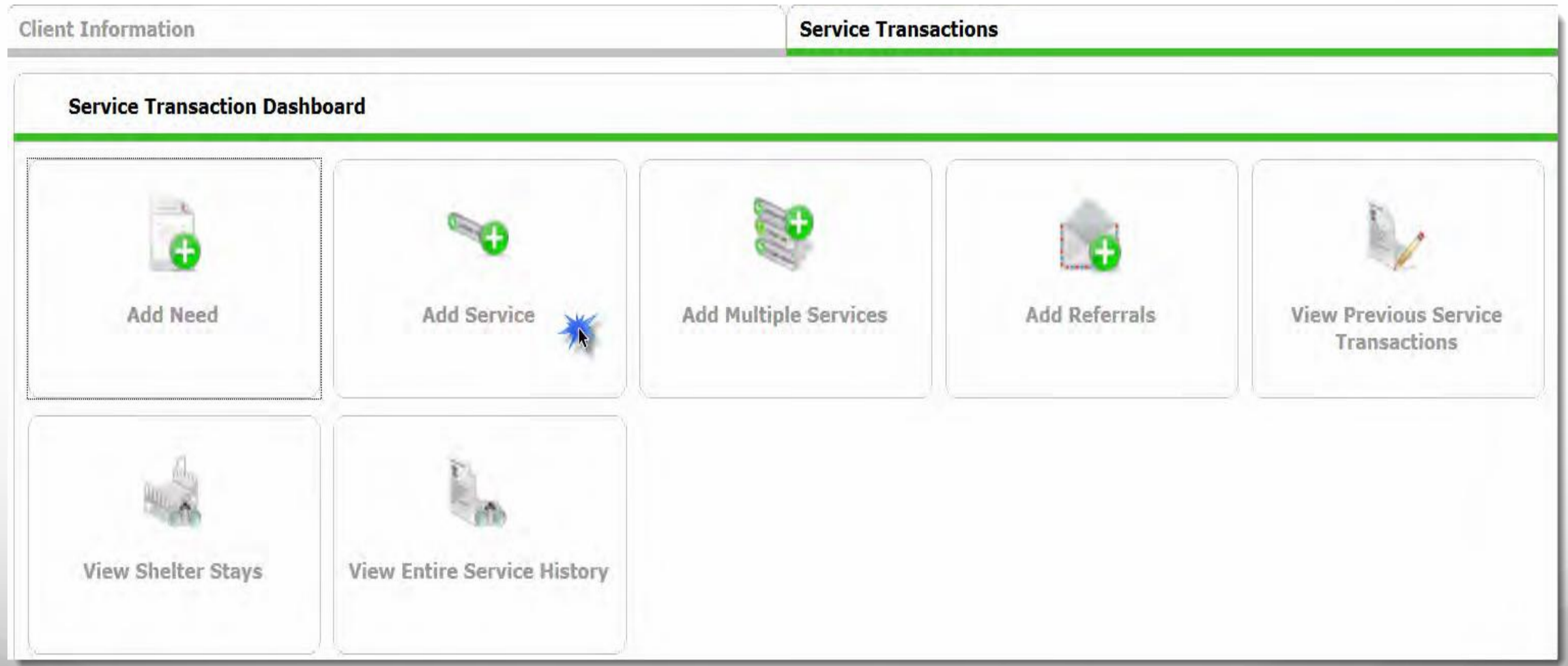
Service Transaction Action Worfklow

- A user can add more Needs, Services or Referrals from this window by clicking the appropriate tab.
- To get back to the Dashboard, click on the "Back to Dashboard" button at the bottom of the screen at this time



Add Service

➢ Click Add Service



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Add Service

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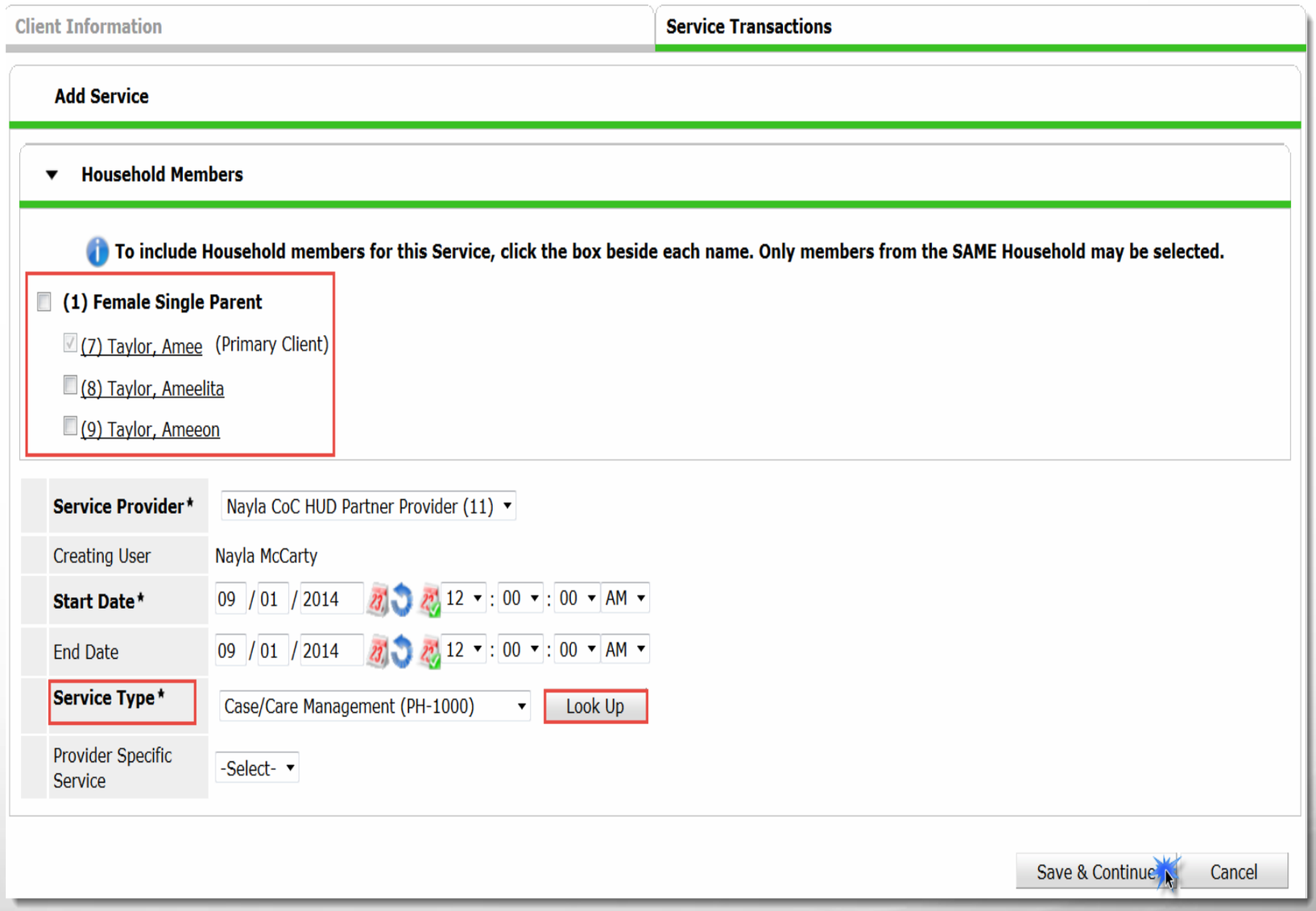
Adding initial Service

- Select Household Members as appropriate (check household type to include all family members at once)
- Date and time will default to either Current System date or Back Date
- Select Service Type from the Service Quick List drop down
- Or Look Up Service Code
- Click Save & Continue



Add Service

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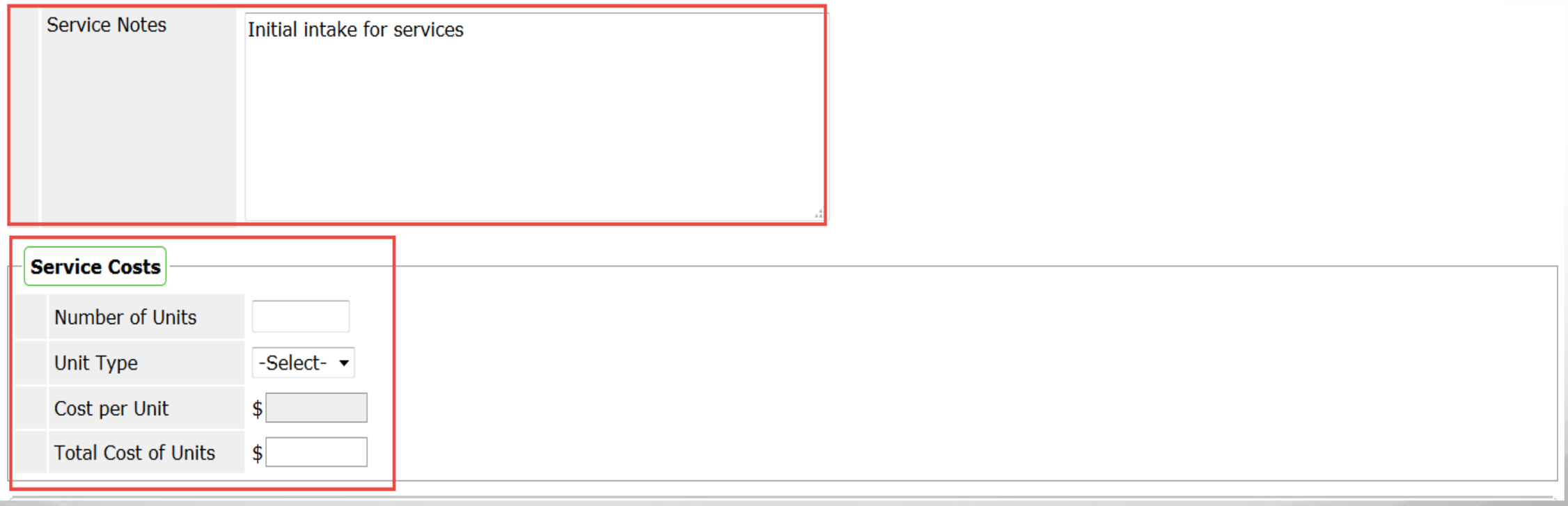
Areas on the Service Screen

Once the service is saved, different areas on the service screen are available to be completed. It depends on your agency's workflow which of these areas would need to be filled out.

- Add Service Notes as necessary
- If protocol at your organization, add Service Costs.
- Continue to scroll down



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Add Service

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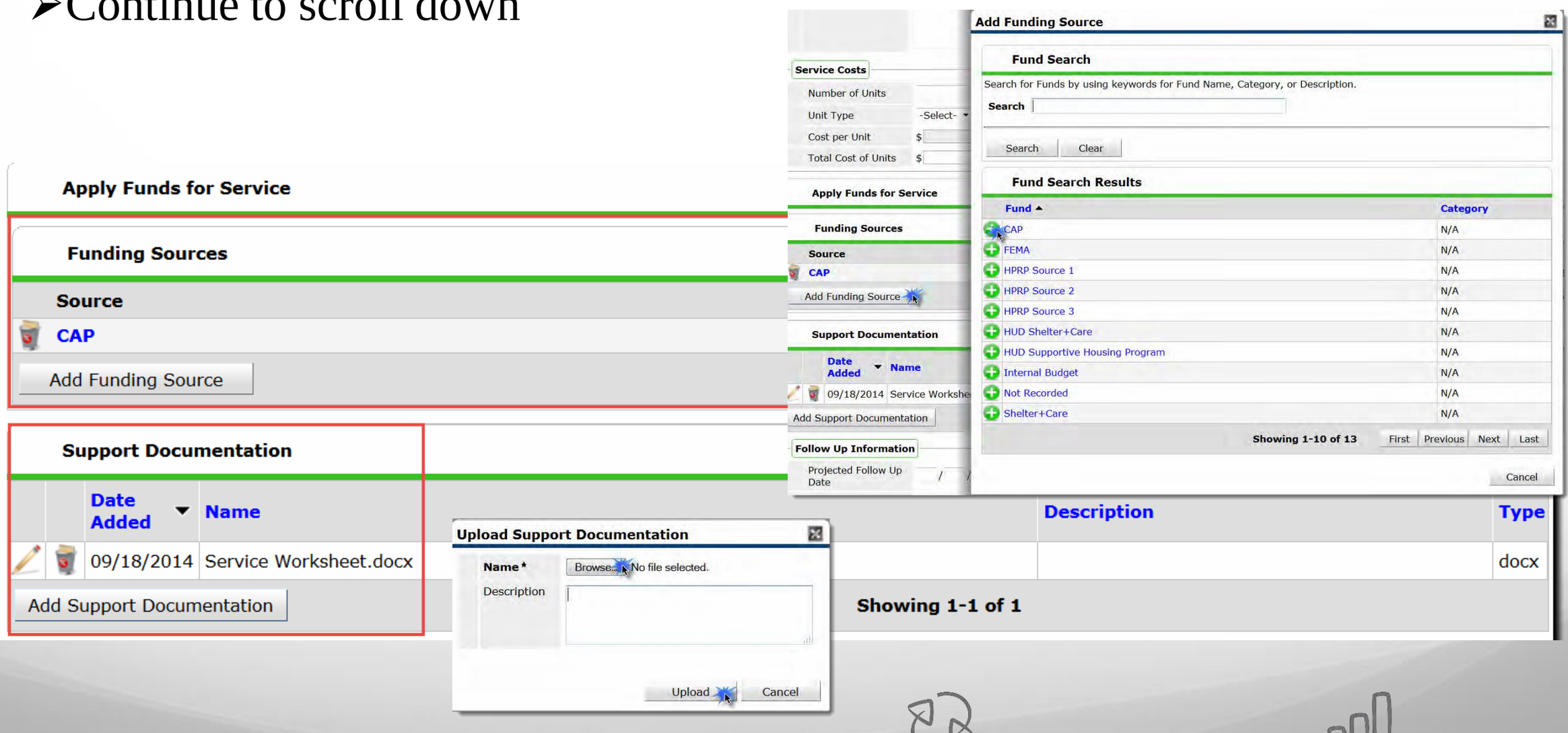
Continued Areas on the Service Screen

- If protocol at your organization, add Funding Source
- Add Support Documentation as appropriate
- Continue to scroll down



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Add Service

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Continued Areas on the Service Screen

- Add Follow-Up information as necessary
- Need Information for this service will be AUTOMATICALLY identified. Use the dropdown menu next to Need Status to select the appropriate status.
- Select Outcome of need if appropriate
- Select Reason if not met as appropriate, then click Save & Exit

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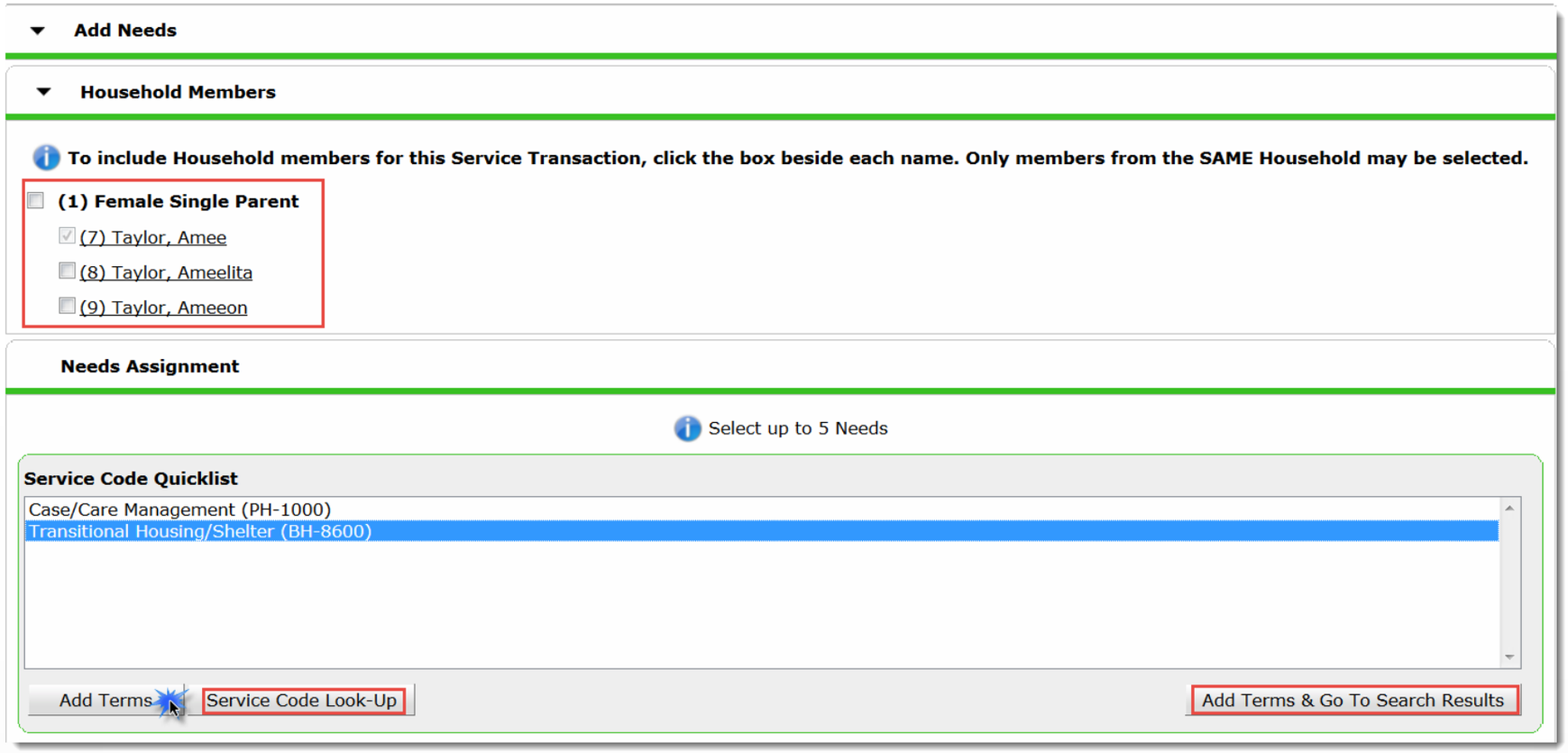
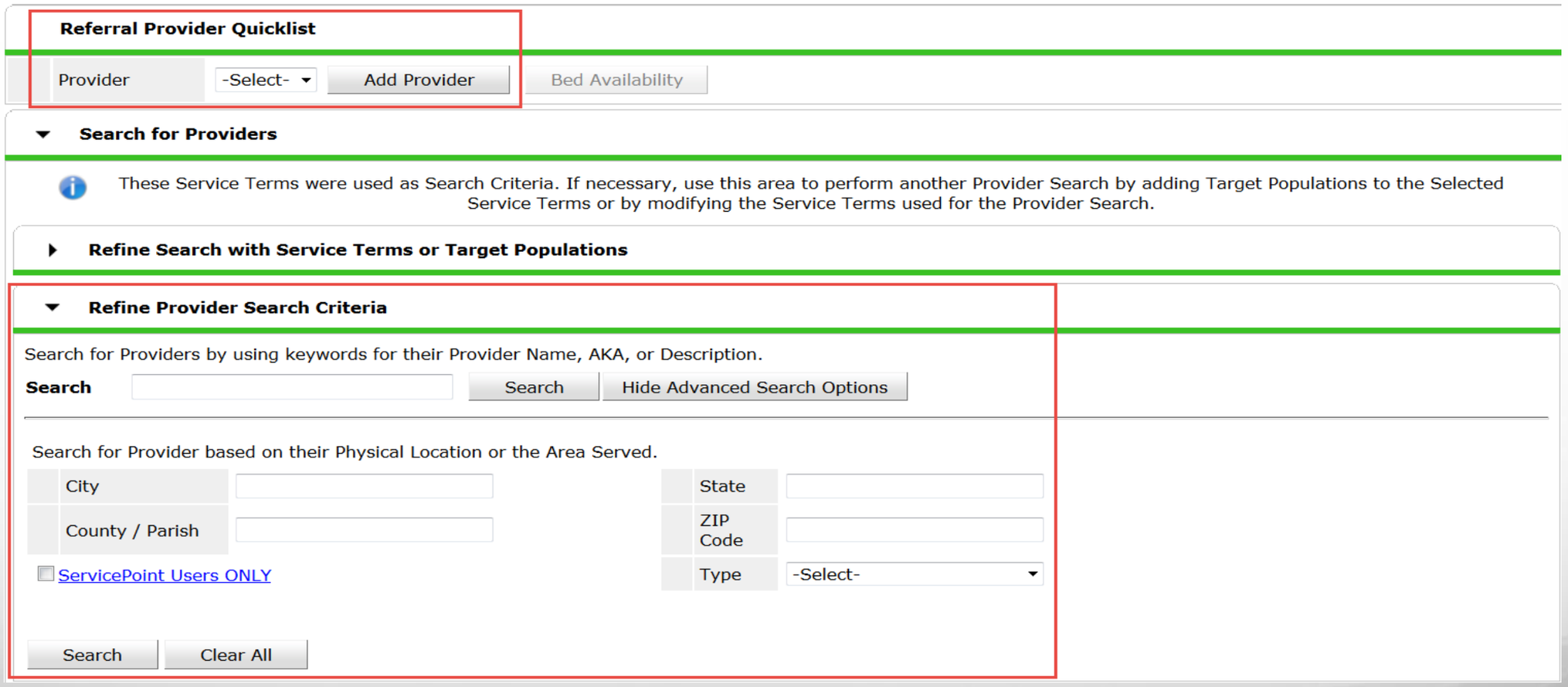
Add Referral



- Return to Service Transactions Dashboard, then click Add Referral
- Select household members as appropriate
- From the Service Code Quick List by highlighting the term then click Add Terms then scroll down, or click Add Terms & Go To Search Results
- OR click Service Code Look-Up

Add Referral

- If setup within your provider, you may have a list of Referral Providers. Click the Provider dropdown arrow to select a provider from the Referral Provider Quicklist
- Users have the option of narrowing based on geography. Use as necessary.

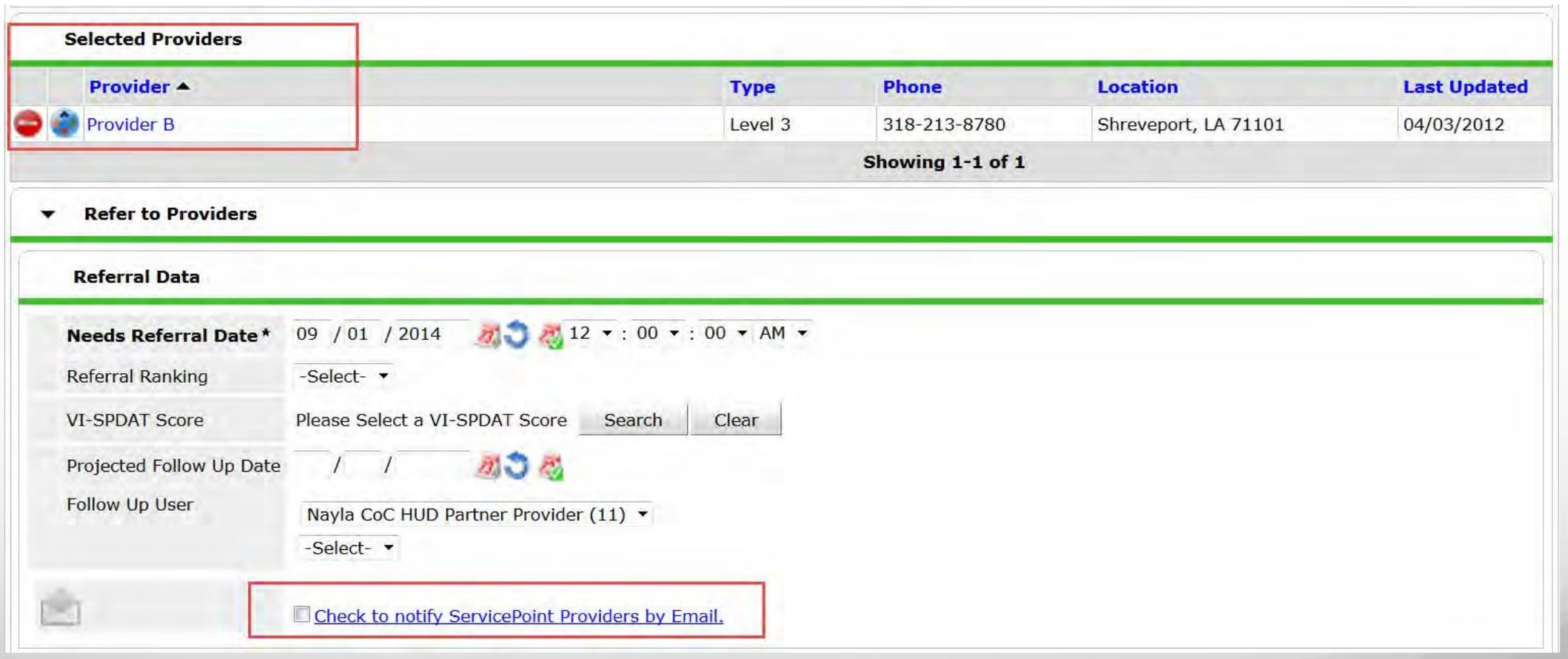


Add Referral

- Adding Needs at the beginning of the search, will automatically trigger a search for providers.
- Click the name of the provider to view this provider's service information, a new pop-up will appear.
- Matched needs show whether that provider provides the service based on the Need selected
- Click the green circle to select this provider for referral

Add Referral

- Referral Provider will appear within Selected Providers once selected
- If the Referral Provider uses ServicePoint, a notification can be sent. Click the box to the left of "Check to notify ServicePoint Providers by Email"



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Add Referral

- Enter Financial need if necessary
- Complete Need Status/Outcome as appropriate
- Click Save ALL! If you click Save Needs ONLY it will ONLY save the needs and NOT the referral.

Referrals Send Summary

Referred-To Provider	Transitional Housing/Shelter	Referred Clients
Provider B (6)	☑	(7) Taylor, Amee

Need Data

Date of Need* 09 / 01 / 2014 12 : 00 : 00 AM

Selected Needs

	Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
⛔	Transitional Housing/Shelter (BH-8600)		Identified -Select- -Select-	

Remove All Needs

Save Needs ONLY | Save ALL | Clear ALL | Cancel

Connecting Communities > Demonstrating Outcomes™

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Entire Service History View

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➢Review Historical Transactions!
Navigate **Back to Dashboard**

Client Information | **Service Transactions**

Needs | Services | Referrals | Shelter Stays | **Entire Service History**

All Service Transactions

Select Dates -Select- **Start Date** / / **End Date** / / Search

Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
Need	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Service	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
Need	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	
Service	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
Need	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	In Progress / Fully Met	
Shelter Stay	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
Need	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Service	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	
Referral	09/01/2014	Provider B	Transitional Housing/Shelter		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Closed / Fully Met	
Service	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Service	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified / Service Pending	

Showing 1-8 of 8

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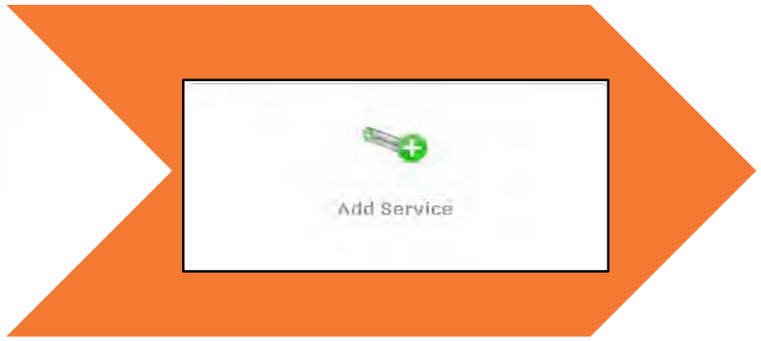

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➢Add services quickly by clicking the "Key" icon to the left of Needs within Entire Service History tab.

Client Information | **Service Transactions**

Needs | Services | Referrals | Shelter Stays | **Entire Service History**

All Service Transactions

Select Dates -Select- **Start Date** / / **End Date** / / Search

Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
Need	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Service	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
Need	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	
Service	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
Need	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	In Progress / Fully Met	
Shelter Stay	09/17/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
Need	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Service	09/17/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified	
Referral	09/01/2014	Provider B	Transitional Housing/Shelter		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Closed / Fully Met	
Service	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management	Identified	
Service	09/01/2014	Nayla CoC HUD Partner Provider	Case/Care Management		
Need	09/01/2014	Nayla CoC HUD Partner Provider	Transitional Housing/Shelter	Identified / Service Pending	

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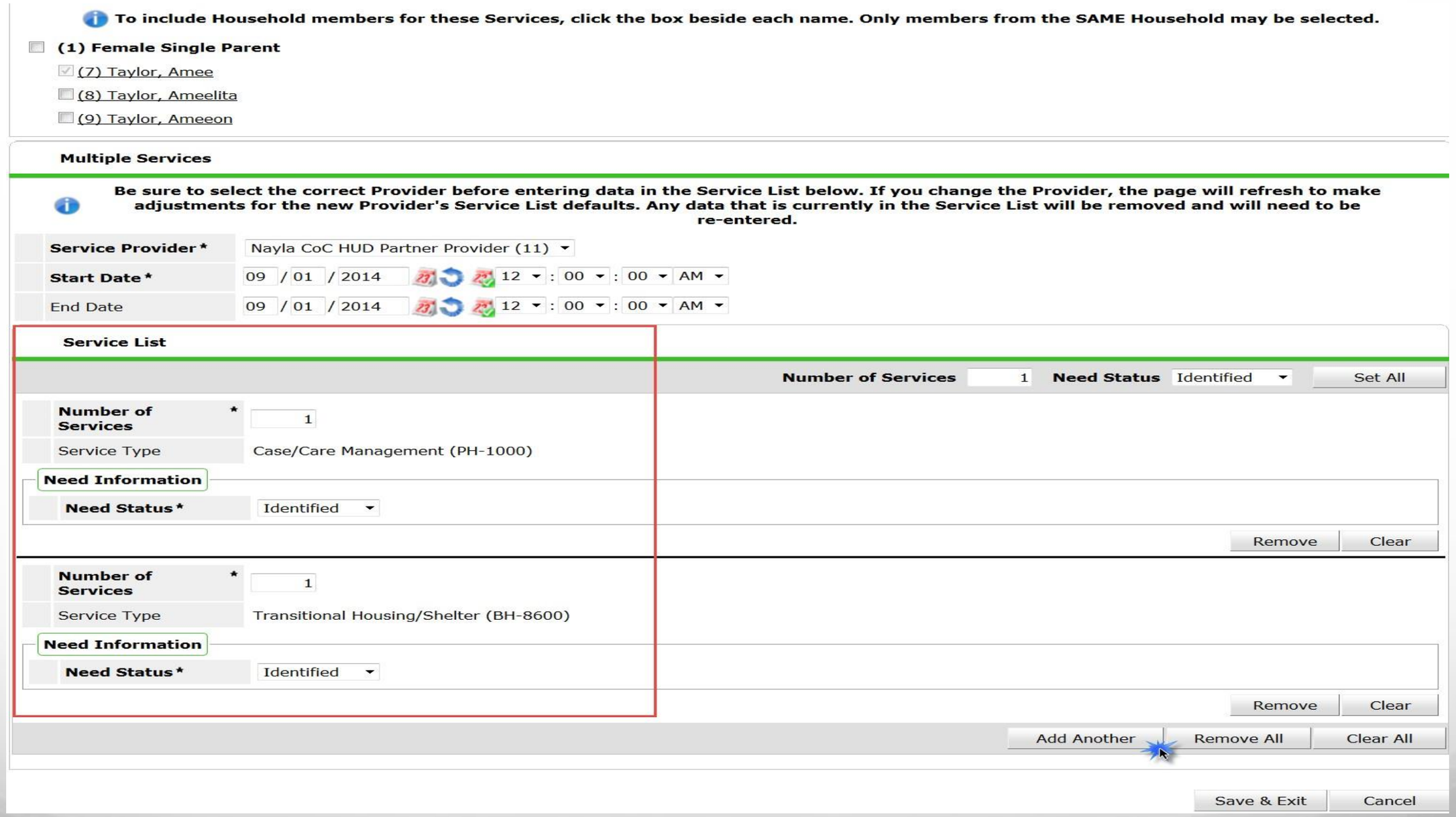
- Click Add Multiple Services within the Service Transactions Dashboard
- Select multiple services at one time