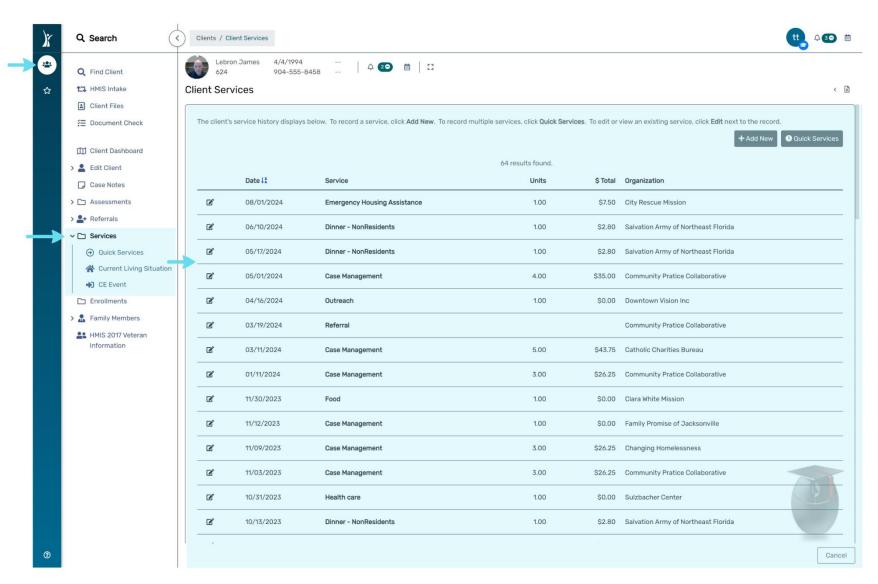## Services: Folder

A service is a task performed for or on behalf of a client or a tangible item provided to a client. Each service has a name, a unit of measure (dollars, hours or minutes, count), a value, and an associated date. Services can be grouped together in a service group. Services are associated with grants which means that by selecting a grant when adding a service, only services "allowed" by that grant will populate in the dropdown menu.

Steps to Navigate to the "Services" Folder

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the "Client Workspace".***

For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".

** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".*

*** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".*

Step 2: Select the "Services" secondary sidebar* menu option. ClientTrack will navigate to the "Client Services" workspace container, and a dropdown menu will appear under the "Services" folder.

For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the "HMIS Basic User 2025 Manual".

Navigating to the "Services" Folder

Viewing and Editing Services through the "Services" folder

Steps to Edit or View Services via the "Services" Folder

Step 1: Select the appropriate client profile via Quick Search*, Find Client: Folder**, or through selecting a client profile through other methods available through ClientTrack. By selecting a client profile, ClientTrack will navigate to the "Client Workspace".***

* For instructions on how to perform a Quick Search, see Chapter 2: Navigating in ClientTrack/General Navigation/Home Screen/Quick Search in the "HMIS Basic User 2025 Manual".

** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Search for Clients Using "Find Client" in the "HMIS Basic User 2025 Manual".

*** To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/Workspaces in the "HMIS Basic User 2025 Manual".

Step 2: Select the "Services" secondary sidebar menu option. ClientTrack will navigate to the "Client Services" workspace container*, and a dropdown menu will appear under the "Services" folder.

* For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/General Page Anatomy and Page Terminology in the "HMIS Basic User 2025 Manual".

Step 3: Select the edit icon* next to the appropriate service entry to view or edit. ClientTrack will navigate to the "Service" workspace container.

*To view a list of icons and buttons used in Client Track HMIS, see Chapter 1: HMIS ClientTrack Basics/Key Terminology and Navigation/Icons and Buttons in the "HMIS Basic User 2025 Manual".

Client Services

The client's service history displays below. To record a service, click **Add New**. To record multiple services, click **Quick Services**. To edit or view an existing service, click **Edit** next to the record.

[+ Add New] [🕐 Quick Services]

64 results found.

	Date	Service	Units	$ Total	Organization
✎	08/01/2024	Emergency Housing Assistance	1.00	$7.50	City Rescue Mission
✎	06/10/2024	Dinner – NonResidents	1.00	$2.80	Salvation Army of Northeast Florida

Edit a service unit | Service title | Total service units | Total service cost | Add new service | Add quick service

Client Services Page Anatomy

Step 4: View or edit entries as applicable.   Required elements are marked with a (*). Click "Cancel" to exit without saving. Click "Save" to save changes. ClientTrack will navigate to the "Client Services" workspace container.

Service

Enter the information about the service provided to the client below.

Family Income:

No Recent Income	
Family Members	7
Poverty Level	$3,944.99

Enrollment: * `-- SELECT --`

Grant: * `-- SELECT --`

Service: * `-- SELECT --`   Location: `CPC Main Office`

Date: * `09/03/2024`

Units Of Measure: *
- ○ Dollars
- ○ Minutes
- ● Count
- ○ Hours

Units: * `1.00`

Unit Value: * `$1.0000`

Total: $1.00

User Performing the Service: `training trainer` 🔍

Comments:

Client Services "Service" Form