Adding Services through the “Services” folder

Steps to Add 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”.

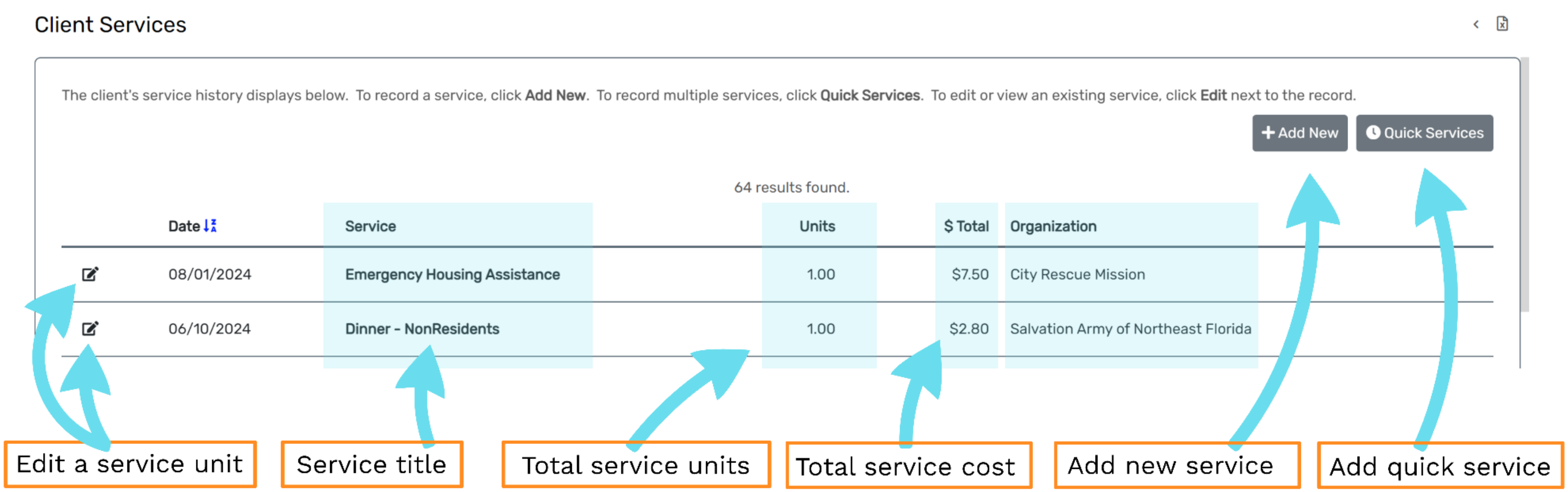
*** For instructions on how to perform a Find Client search, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*Search for Clients Using “Find Client” *in the* “HMIS Basic User 2025 Manual”.

**** 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.

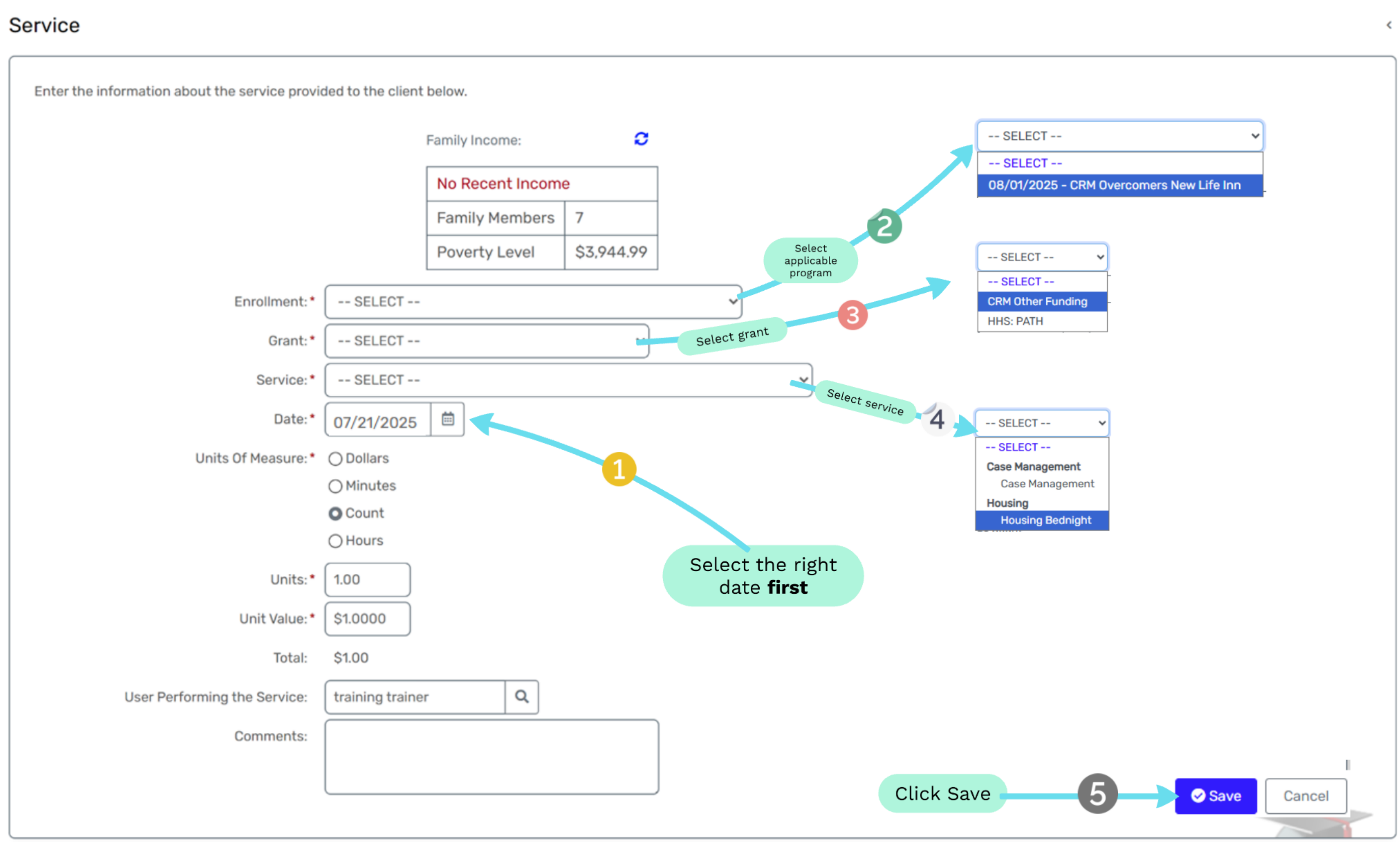
** For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/*General Page Anatomy and Page Terminology in *the* “HMIS Basic User 2025 Manual”.

Step 3: Select the “Add New” button at the top right section of the “Client Services” workspace container. ClientTrack will navigate to the “Service” workspace container.



Client Services Page Anatomy

Step 4: The *Service form* will ask to enter information about the service being provided to this client. Please refer to your organization's program guide and/or speak with your supervisor regarding how to best record service units for a client's specific program. Required elements are marked with a (*).



Client Services "Service" Form

Step 5: Select the "Enrollment" from the enrollment field dropdown menu.

Tips and Tricks - *Services - Choosing the correct enrollments*

- Services need to be tied to a specific enrollment to show up on reports such as the Service Summary Report.
  - Select the enrollment you need to record the service.
  - You will notice that only open enrollments (with no exit date) will show.

  (Refer to your program guide an/or speak to your supervisor regarding choosing enrollments)

Tips and Tricks – Choosing Correct Enrollments in Services

Step 6: Select the "Grant" from the grant field dropdown menu. The Grant field is used to link the service to the grant for APR purposes.

Tips and Tricks - *Services - Choosing the correct grant*

- Select the grant you need to record the service under.
- Selecting a grant also ensures that the service dropdown menu only lists services allowed by that grant
- You will notice that only grants for the client's active enrollments will be on the dropdown menu.

(Refer to your program guide an/or speak to your supervisor regarding choosing enrollments)

Tips and Tricks – Choosing Correct Grants in Services

Step 7: Select the "Service" from the service field dropdown menu.

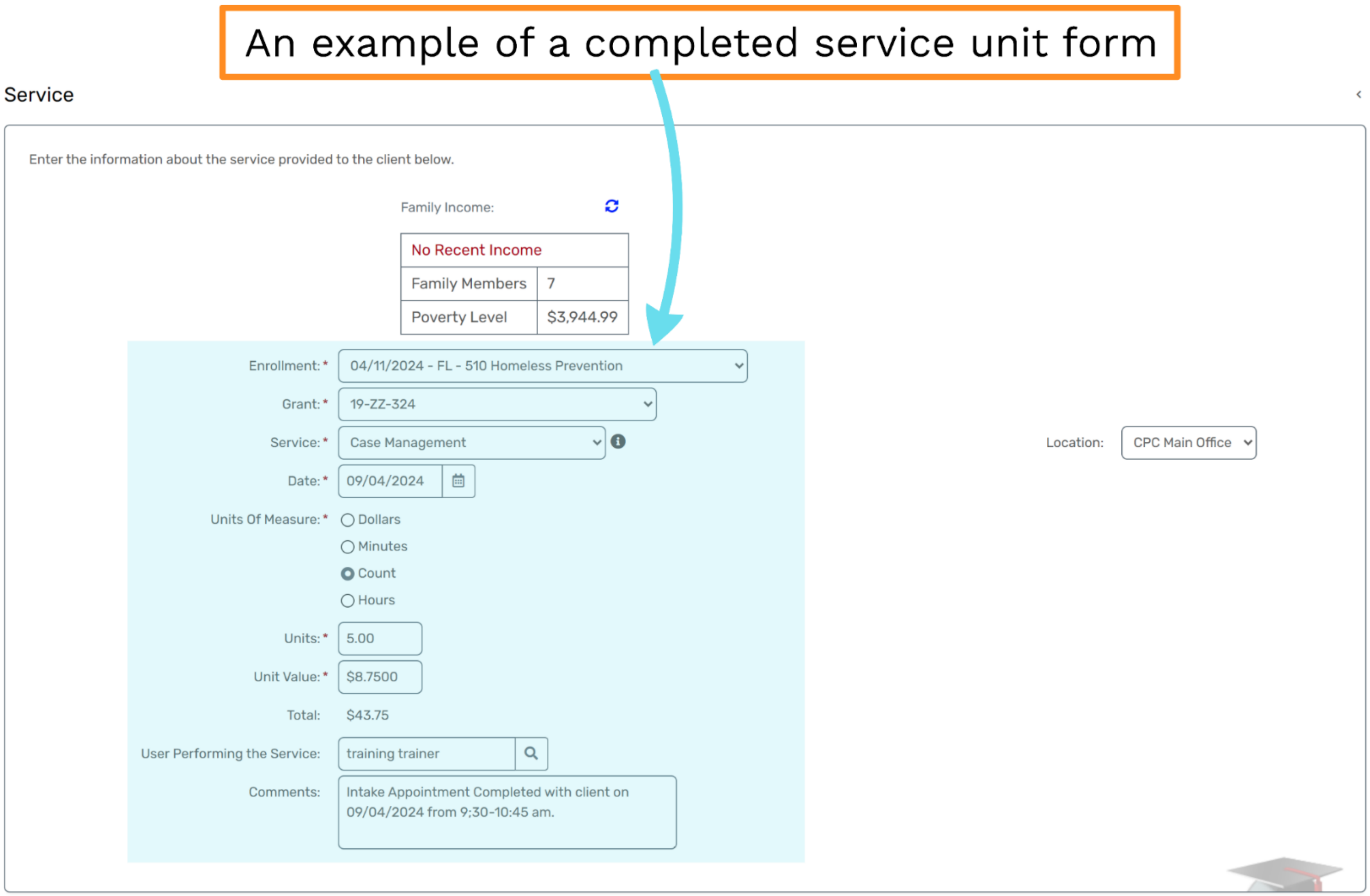
Step 8: Verify the “Date” field is correct. Services may be backdated by changing the date here, however, the service must occur on or after the enrollment date to tie properly for reporting.

Step 9: Verify the “Units of Measure” and enter the number of “Units” into the unit field.

Step 10: If required by a program, type a brief/descriptive comment in the “Comment” box*. This is especially necessary if providing a monthly service that should not be duplicated (ex. Rental assistance). Adding keywords will clarify any ambiguity around the details of the service.

** Each Service entered should have a Case Note* entered for that day as well that provides further documentation/details about the Service provided.*

** For instructions on managing and entering Case Notes, see Chapter 4: Client Workspace: Menu Options, Folders, and Subfolders/*Case Notes: Folder *in the* “HMIS Basic User 2025 Manual”.


An example of a completed service unit form

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:* 04/11/2024 - FL - 510 Homeless Prevention

Grant:* 19-ZZ-324

Service:* Case Management

Location: CPC Main Office

Date:* 09/04/2024

Units Of Measure:* Dollars / Minutes / Count / Hours

Units:* 5.00

Unit Value:* $8.7500

Total: $43.75

User Performing the Service: training trainer

Comments: Intake Appointment Completed with client on 09/04/2024 from 9:30-10:45 am.

Example of a Completed Service Unit Form

Step 10: Click “Save” to save changes or click “Cancel” to exit without saving. ClientTrack will navigate to the “Client Services” workspace container. The service entered is viewable from the “Client Services” workspace container.

Quick Services

Quick Services is a feature designed to help specific programs that need to record a high rate of services in a short timeframe. For more information regarding quick services, contact hmis@changinghomelessness.org