HMIS Document

ClientTrack User Guide

How to Create a Service

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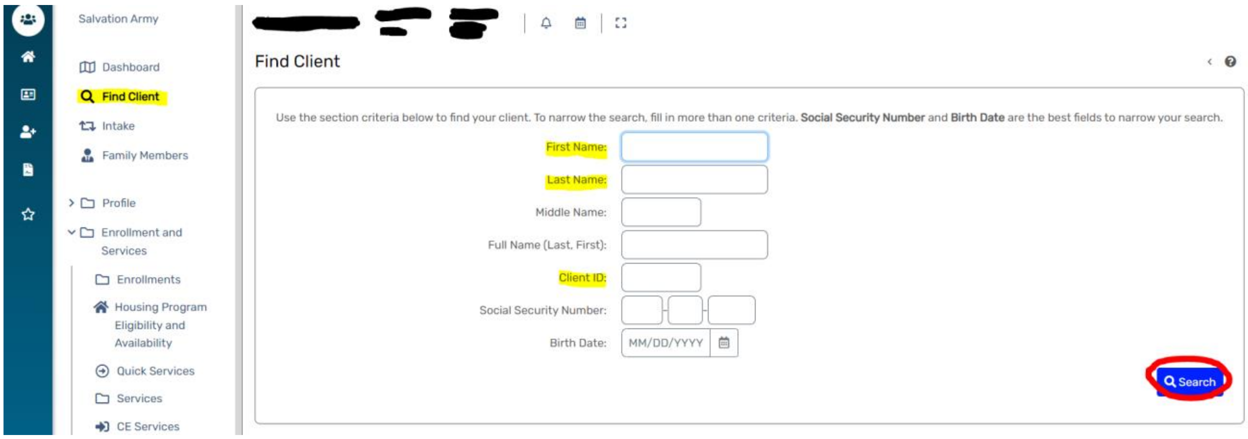
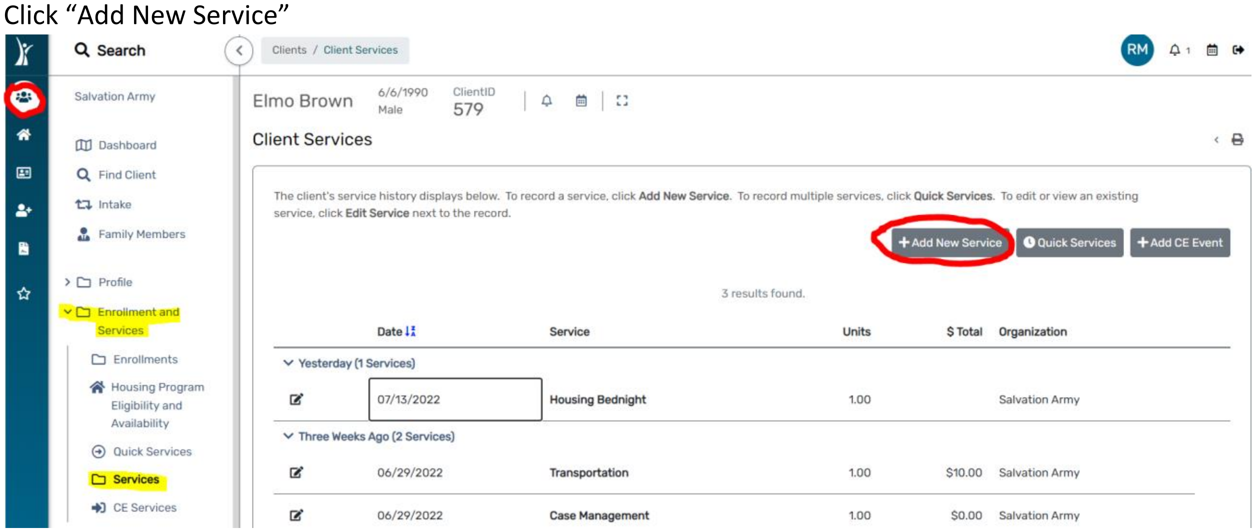
ClientTrack User Guide – How to Create a Service

1. Click into the Client workspace on the blue menu bar.
2. Use the “Find Client” function in the menu to go to the participant’s record.
    a. Either search using the HMIS ID number, or by first and last name to view a list of possible matches.



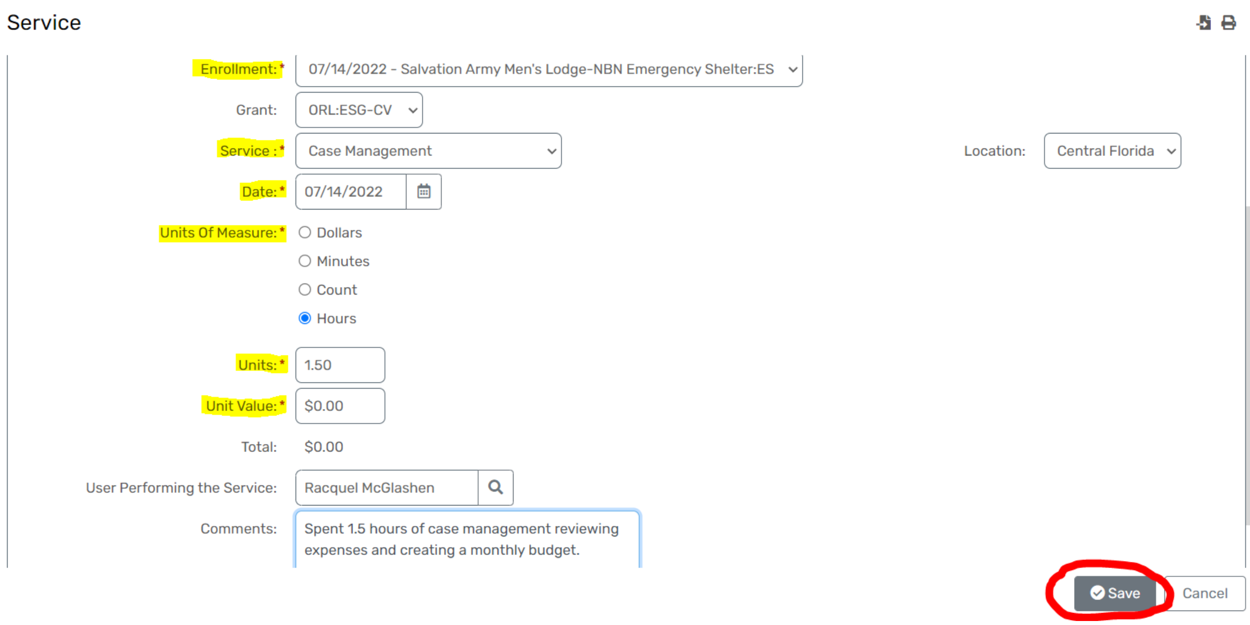
3. On the client’s record, go to “Services” – there are two ways to get there:
    a. On the client’s dashboard, scroll down and click on the “Services” section header title.
    b. On the side menu, expand the folder for “Enrollments and Services” and select “Services” from the list.
4. Click “Add New Service”



5. Complete the service form to capture the following data about the service provided:
    a. Enrollment – select the active program they are enrolled into linked to this service
    b. Grant (optional) – select a funding source to narrow down the list of services
    c. Service – select the service provided
    d. Date – enter the date the service was provided
    e. Unit of Measure – enter the frequency at which the service was provided

    i. Dollars – use this measure for service where additional funds are spent (eg. Rental/utility assistance)
    ii. Minutes/hours – use either of these measures for services where time is spent
    iii. Count – use this measure for services where item(s) are provided (eg. Bus passes, showers, meals, food pantry, clothing vouchers, diapers, etc).

  f. Units – the frequency at which a service was provided
    i. Example 1: Case management – 1 hour (hour = unit of measurement and 1 = how much of that service was spent)
    ii. Example 2: Transportation – 10ct of bus passes (count = unit of measurement and 10 = how much of that service was provided
    iii. Example 3: Rental assistance - $1000.00 for one month (dollars = unit of measurement and 1 month = how many times that services was provided
  g. Unit Value – if a dollar amount applies, enter how much each unit is valued at (eg. One month of rent = $1000.00). If a dollar amount does not apply, leave at $0.00.



6. Once the form is filled out, click “Save”.
  a. You should see the newly added service along with any other services entered prior to for this individual. This will also appear on the client’s dashboard.