

## Adding Services into ClientTrack

**REMINDER:** client must be enrolled into a program before you can add services to their file.

First, identify if your client is currently active in the program you are needing to enter services for. As we can see, Strawberry is currently Active in the HOME project, this is a Rapid Rehousing program that provides services.

The screenshot displays the ClientTrack interface for a client named Strawberry Pancake. The client's profile shows they are active in the HOME project, which is a Rapid Rehousing program. A blue arrow points to the 'HOME' enrollment entry in the table.

**Client Profile:**

- Name: Pancake, Strawberry
- Birth Date: 1/17/2004
- Age: 20
- Gender: Woman (Girl, if child)
- Race: White
- Veteran: No

**Strawberry's Enrollments:**

1 result found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Project Exit Date	Days Enrolled	Exit Destination	Housing Move-In Date	Last Assessed	Program Type
▼ Active									
▼ PH - Rapid Re-Housing									
... HCPC - HOME	1	Household without Children	04/11/2024		6			4/11/2024	55

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There are 2 ways to enter a service. The first way is via “**Case Note**” Begin by locating “**Case Note**” under the “**Profile**” folder. Next locate the button “**Add New Case Note**”

The screenshot shows the 'Client Case Notes' page for 'Pancake, Strawberry' (ClientID 9977). The left sidebar has 'Case Notes' selected under the 'Profile' folder. The main content area shows a table of case notes with columns: Date, Regarding, User, Organization, and Print. A blue arrow points to the '+ Add New Case Note' button.

In the “**Regarding**” section, please notate the specific service the client is being provided. Additionally, enter a note in the case note explaining the service and the amount of service that was provided. For example: **Regarding:** Security Deposit. **Case Note:** Issued Check for Security Deposit by the amount of: \$1,500. If you need to *backdate* the service, please make sure to update the Date Field to the date the service was provided.

The screenshot shows the 'Case Note' entry form for 'Pancake, Strawberry' (ClientID 9977). The form fields are: Entry Date (04/17/2024), User (Katrina Panzica), Regarding (Security Deposit), and Note Type (-- SELECT --). The text editor contains the text: 'Client Name: Strawberry Pancake 04/17/2024 Issued Check for Security Deposit by the amount of: \$1,500.' A blue arrow points to the text editor.

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Continue to scroll down the page to the **Services** section. Make sure a line is check marked and continue to enter service information section by section. **Service** will be the type of service provided, for this example, it is Security Deposit. Next, select the **Enrollment** the service is tied to. Select the **Unit of Measure** this will be either dollar, minute, count, or hours depending on the service. Finally enter either a **Unit Value** or **Units** depending on the service type. Select save when finished.

The screenshot displays the 'Case Note with Services' form in ClientTrack. The client is Strawberry Pancake, born 1/17/2004, with ClientID 9977. The form includes a sidebar with navigation options like Dashboard, Find Client, Intake, and Profile. The main form area has a 'Services' section with a table for recording services. The table has columns for Service, Enrollment, Units Of Measure, Unit Value, and Units. A red arrow points to the 'Service' column, another to the 'Enrollment' column, a third to the 'Units Of Measure' column, a fourth to the 'Unit Value' column, and a fifth to the 'Units' column. A blue arrow points to the 'Save' button at the bottom right.

Service*	Enrollment*	Units Of Measure*	Unit Value*	Units*
<input checked="" type="checkbox"/> Security deposits	04/11/2024 - HCPC - HOME	Dollars	\$1,500.00	1.00
<input type="checkbox"/> -- SELECT --	-- SELECT --	-- SELECT --		

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The second way to add a service is to locate the “**Enrollment and Services**” folder. In that folder you will locate “**Services**”. Next select “**Add New Service**”

The screenshot displays the ClientTrack interface for a client named Strawberry Pancake. The sidebar on the left shows the navigation menu with 'Enrollment and Services' expanded and 'Services' highlighted. The main content area shows the client's service history with a table containing one record. A blue arrow points to the '+ Add New Service' button.

**Client Information:** Strawberry Pancake, 1/17/2004, ClientID 9977, Woman (Girl, if child)

**Client Services:**

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

No records found.

Date	Service	Units	\$ Total	Organization	Enrollment
		0.00	\$0.00		

Buttons: + Add New Service, Quick Services, + Add CE Event

Cancel

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You will then continue to fill out the form provided. Please select an **Enrollment** and **Service**, you will not need to select a Grant. If you need to backdate a service, please enter the desired date in the **Financial Assistance Start Date**. If this is not a pending transaction, then you can enter the same date in the **Financial Assistance End Date**. If you do not need to back date, leave automatically populated date. Continue to select the proper **Units of Measure, Units, Unit Value**. Select **Save** when completed.

The screenshot shows the 'Service' form for a client named 'Strawberry Pancake'. The form is titled 'Service' and includes the following fields and values:

- Enrollment: 04/11/2024 - HCPC - HOME
- Grant: -- SELECT --
- Service: Security deposits
- Location: Polk County
- Financial Assistance Start Date: 04/17/2024
- Financial Assistance End Date: 04/17/2024
- Units Of Measure: Dollars (selected)
- Units: 1.00
- Unit Value: \$1,500.00
- Total: \$1,500.00
- User Performing the Service: Katrina Panzica

At the bottom right, there is a 'Save' button and a 'Cancel' button. A 'Search' bar is visible at the top left of the form area.

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Once entered you will be able to verify on the **Services** page the newly entered service along with the **total dollar amount, units, organization** that entered the service, and the specific **enrollment** the service is associated with.

The screenshot shows the ClientTrack interface for a client named Strawberry Pancake. The client's information includes a date of birth of 1/17/2004, gender of Woman (Girl, if child), and ClientID 9977. The 'Client Services' section displays a table with one service record for 'Security deposits' on 04/17/2024. The table columns are Date, Service, Units, \$ Total, Organization, and Enrollment. The service record shows 1.00 units, a total of \$1,500.00, provided by Polk County, and associated with the HPCPC - HOME enrollment. The left sidebar contains navigation options, with 'Services' highlighted. A 'Cancel' button is located at the bottom right of the main content area.

Date	Service	Units	\$ Total	Organization	Enrollment
04/17/2024	Security deposits	1.00	\$1,500.00	Polk County	HPCPC - HOME

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