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.

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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"**

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.

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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 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"**

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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.

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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.