



HMIS Document

ClientTrack User Guide

How to Create a Service

Homeless Services Network of Central Florida

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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.

Salvation Army

Dashboard

Find Client

Intake

Family Members

Profile

Enrollment and Services

Enrollments

Housing Program Eligibility and Availability

Quick Services

Services

CE Services

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.

First Name:

Last Name:

Middle Name:

Full Name (Last, First):

Client ID:

Social Security Number:

Birth Date:

Search

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”

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Clients / Client Services

Elmo Brown 6/6/1990 Male ClientID 579

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.

Add New Service Quick Services Add CE Event

3 results found.

Date	Service	Units	\$ Total	Organization
Yesterday (1 Services)				
07/13/2022	Housing Bednight	1.00		Salvation Army
Three Weeks Ago (2 Services)				
06/29/2022	Transportation	1.00	\$10.00	Salvation Army
06/29/2022	Case Management	1.00	\$0.00	Salvation Army

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.

Service 🔍 📄

Enrollment: 07/14/2022 - Salvation Army Men's Lodge-NBN Emergency Shelter:ES ▼

Grant: ORL:ESG-CV ▼

Service: Case Management ▼ Location: Central Florida ▼

Date: 07/14/2022 📅

Units Of Measure:

- Dollars
- Minutes
- Count
- Hours

Units: 1.50

Unit Value: \$0.00

Total: \$0.00

User Performing the Service: Racquel McGlashen 🔍

Comments: Spent 1.5 hours of case management reviewing expenses and creating a monthly budget.

✔ Save Cancel

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.