

Quick Services – Multiple Clients

Video Coming Soon

Introduction

If you need to record services for multiple clients on the same date, you can use the Quick Services – Multiple Clients feature.

How to use Quick Services – Multiple Clients

1. Navigate to your Home Workspace

The screenshot shows the ClientTrack Home workspace. A red box highlights the Home icon in the top navigation bar, with a red arrow pointing to it and the text "Click these arrows". Another red box highlights the "HOME" button in a client selection pop-up, with a red arrow pointing to it and the text "Then click 'Home'". The main content area shows the "Quick Services for Multiple Clients" form.

2. In the Favorites Menu on the left of the page, click “Quick Services – Multiple Clients”

You may or may not see all of these options. Be sure you are under the “My ClientTrack” section of the favorite menu on your Home workspace. If you still do not see “Quick Services – Multiple clients” submit a service request via Spiceworks.

The screenshot shows the Home workspace Favorites menu. The "Quick Services - Multiple Clients" option is highlighted with a red box and a red arrow pointing to it.

3. Complete these fields with the appropriate responses.

Quick Services for Multiple Clients

This form may be used to quickly record one service to multiple clients. Select a service screen and a specific service, date, and units that you would like to record. Once you have defined a service, you may use the search icon on each row below to find clients to post the service to.

Alternatively, you can select a program from the drop-down list to pre-populate the rows with clients who are enrolled in a particular program as of the date identified in the service date. Simply check the box next to each client to record the service.

Service Screen: **Direct Services** ← Select "Direct Services"

Service: **DART Bus Pass-Daily** ← Select the service you provided

Service Date: * 12/21/2020

Default Units: 1.00

Units Of Measure: * Count

Unit Value: 0.00

Location: -- SELECT --

Provider:

User Performing the Service: Megan Starnes

Program Enrollment: **HMIS Training - Emergency Shelter (N/N)** ← Select the project the clients are enrolled in

4. Scroll down and select the clients who received the service.

Program Enrollment: HMIS Training - Emergency Shelter (N/N)

17 results found (+5).

<input type="checkbox"/>	Client*	Comments	Units	Enrollment*
<input type="checkbox"/>	Bel, Little Casper			08/01/2020 - HMIS Training - Emergency Shelter (N/N)
<input type="checkbox"/>	Blue, Gandalf The			07/17/2020 - HMIS Training - Emergency Shelter (N/N)
<input type="checkbox"/>	Dagger, Prince Bobby			12/08/2020 - HMIS Training - Emergency Shelter (N/N)
<input type="checkbox"/>	First, After			04/01/2019 - HMIS Training - Emergency Shelter (N/N)
<input type="checkbox"/>	Grey, Gandalf The			07/17/2020 - HMIS Training - Emergency Shelter (N/N)
<input type="checkbox"/>	Hunter, Monica			10/01/2019 - HMIS Training - Emergency Shelter (N/N)
<input type="checkbox"/>	Mdha, Freda J Jr			09/02/2020 - HMIS Training - Emergency Shelter (N/N)

If you do not see your client here, they are not enrolled in this project. A service must be attached to an enrollment in HMIS, so you will need to enroll your client before recording this service for them.

5. Click "Save and Close", then check at least one or two of the clients' records to be sure the service was saved.