Quick Services – Multiple Clients

Video Coming Soon

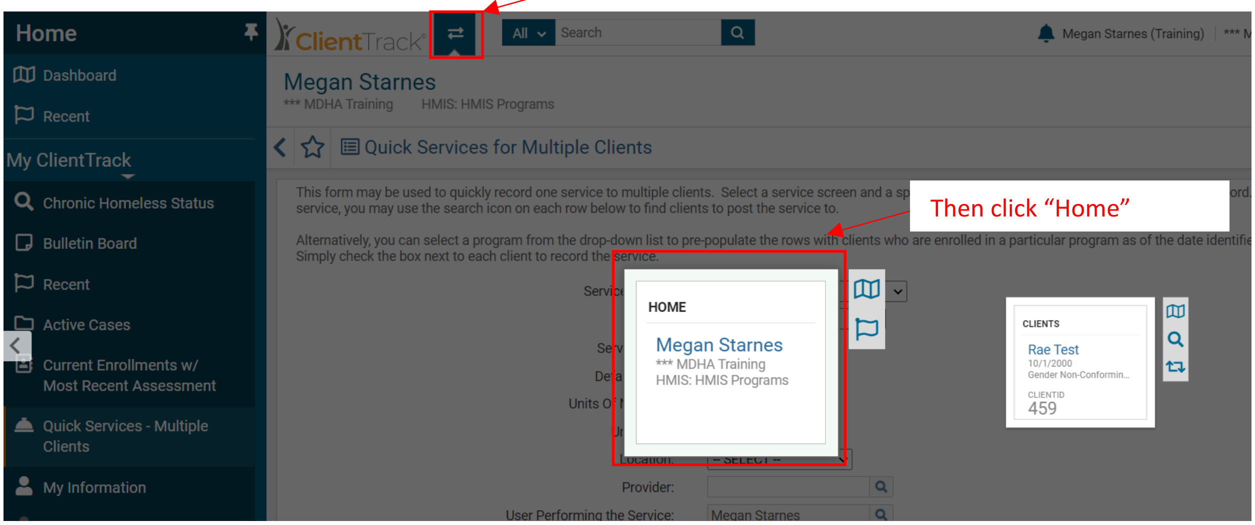
Introduction

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

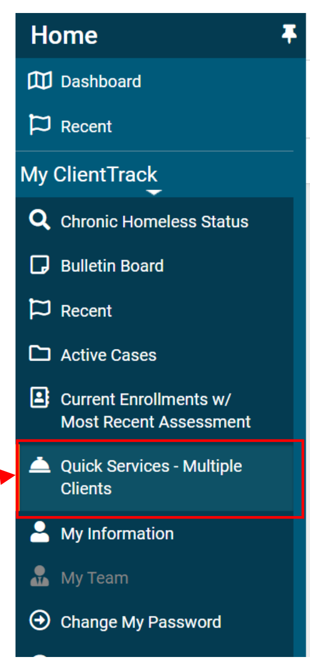
1. Navigate to your Home Workspace

Click these arrows

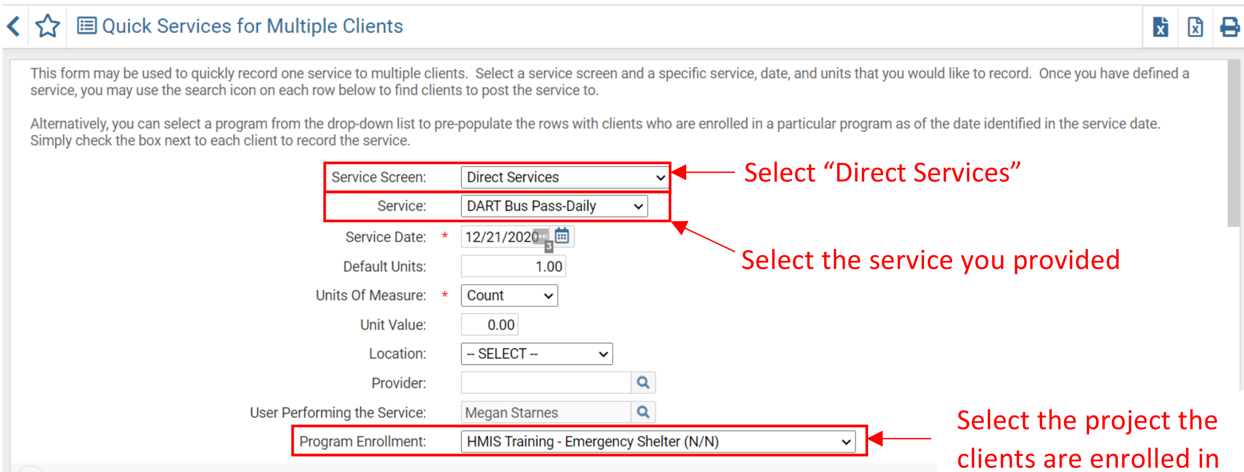


2. In the Favorites Menu on the left of the page, click "Quick Services – Multiple Clients"

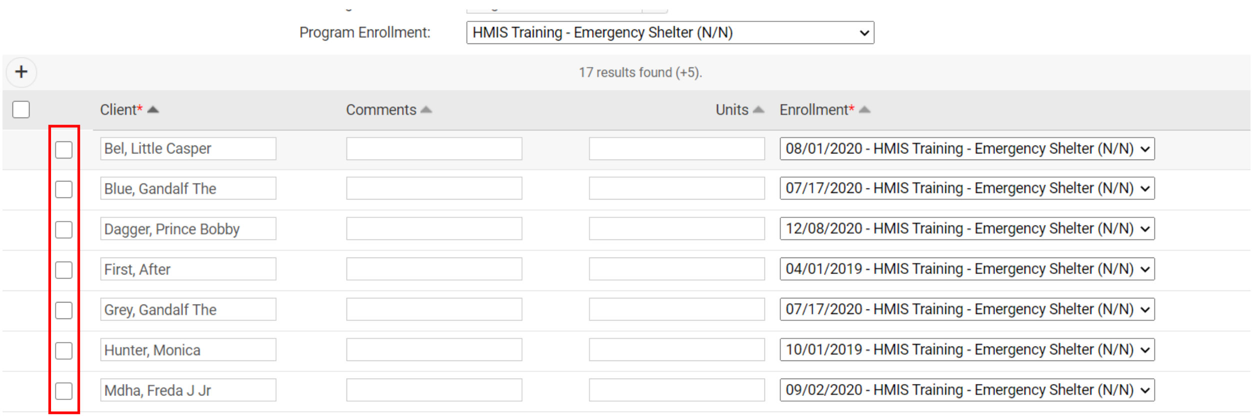
You may or may not see all of these options. Be sure you are under the "My ClientTrack" section of the favorite menu on your Home workspace. If you still do not see "Quick Services – Multiple clients" submit a service request via Spiceworks.



3. Complete these fields with the appropriate responses.



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



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.