

Quick Services for Multiple Clients

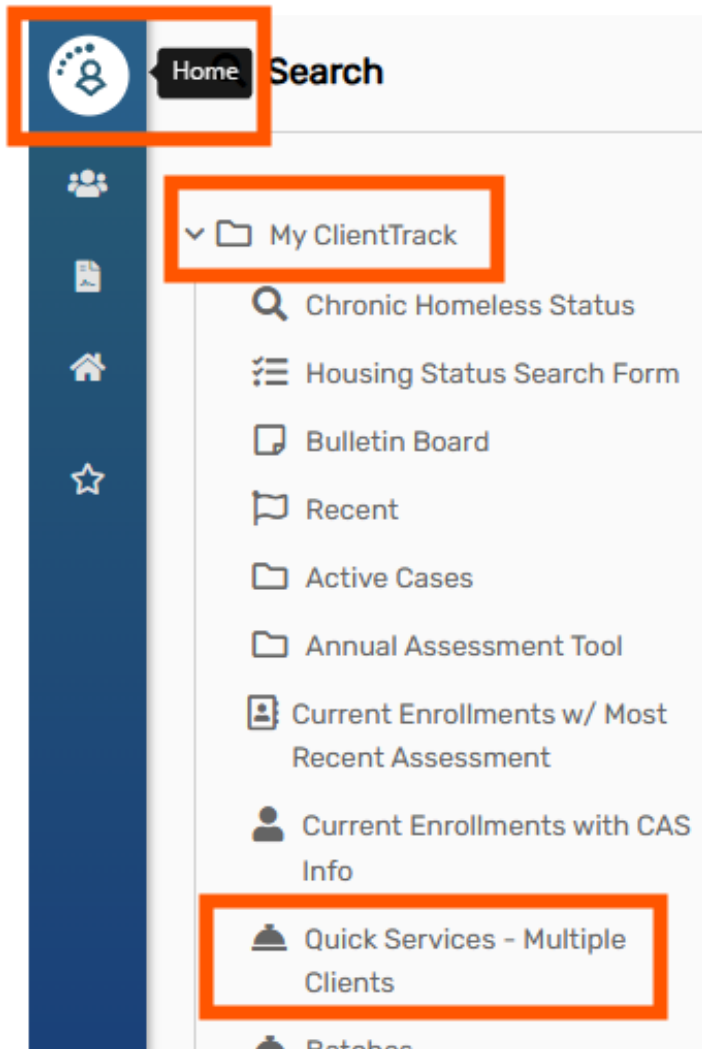
Introduction

You can use the Quick Services – Multiple Clients feature when you are recording a service with the following criteria:

- One services
- Provided to multiple clients
- Who are enrolled in your program
- On the same date

Recording Multiple Quick Services

1. Navigate to your **Home Workspace menu**, select **Quick Services – Multiple Clients**.



3. Complete the required fields:

- **Service Screen:** Direct Services
- **Service:** select the service you provided
- **Service Date:** enter the date the service was provided
- **Program Enrollment:** select the program these clients are enrolled in

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: Bedding ← Select the service you provided

Service Date: 09/02/2022

Default Units: 1.00

Units Of Measure: Count

Unit Value: 0.00

Location: -- SELECT --

Provider:

User Performing the Service: Haley Walton

Program Enrollment: ASC - Emergency Shelter (E/E) ← Select the project the clients are enrolled in

4. Scroll down and **check the box** next to each client who received the service on this service date.

4 results found (+5).

☐	Client*	Comments	Units	Enrollment*
☐	Test, Haley			09/02/2022 - ASC - Emergency Shelter (E/E)
☐	test, hmis			08/17/2022 - ASC - Emergency Shelter (E/E)
☐	Test, Jane			08/15/2022 - ASC - Emergency Shelter (E/E)
☐	Test, Joe			08/08/2022 - ASC - Emergency Shelter (E/E)
☐				-- SELECT --
☐				-- SELECT --
☐				-- SELECT --
☐				-- SELECT --
☐				-- SELECT --

Note: If you do not see a client here, they do not have an active enrollment in your program. 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**. You may want to go spot-check 1 or 2 client records to confirm the service was correctly recorded.