

## Shelter Count Guide: How to Enter a Service in HMIS

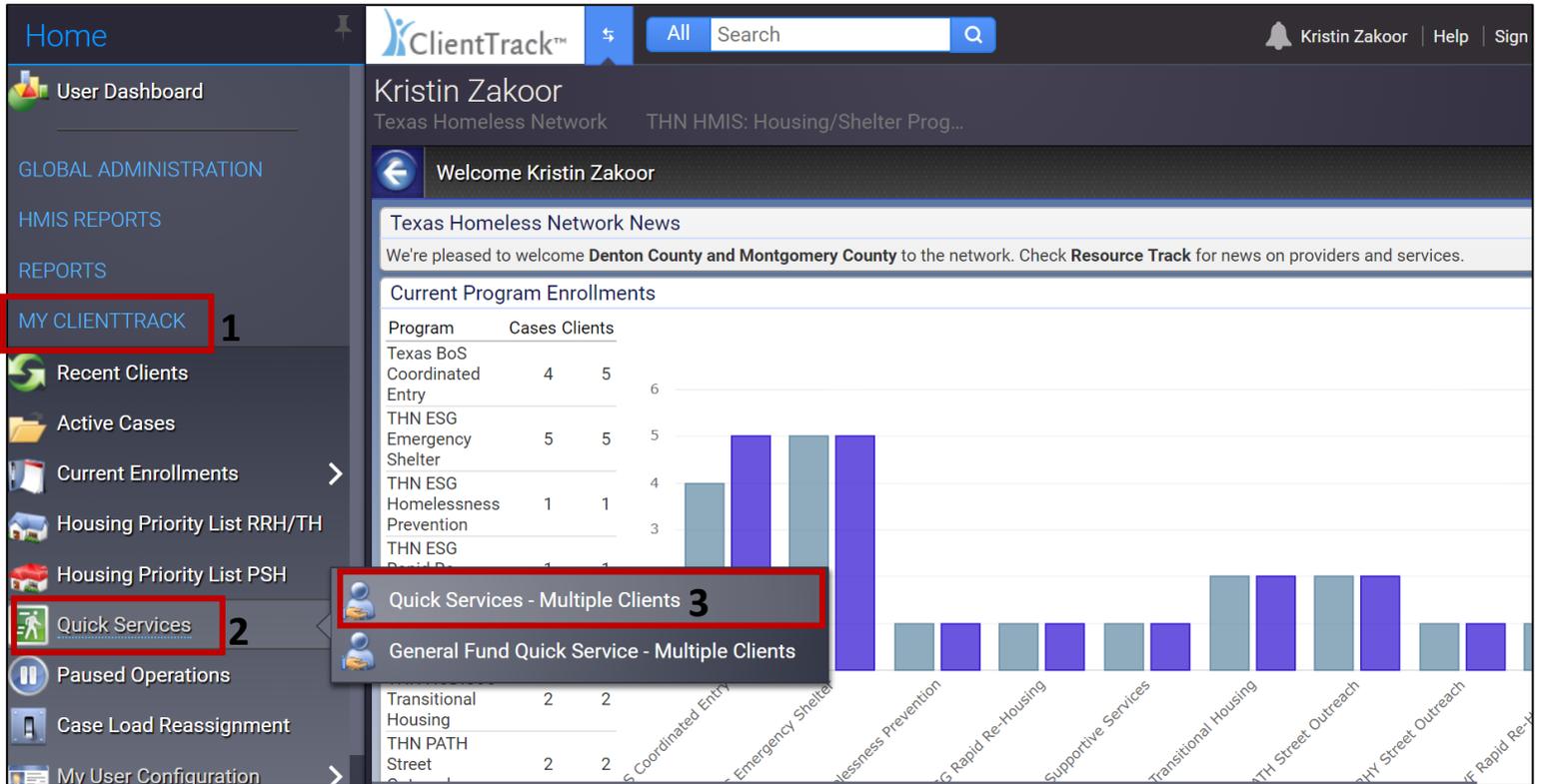
*\*Please remember to enter a "PIT Count 2018 Service" for each client that completes a Point-in-Time Count survey on January 25<sup>th</sup>, 2018.\**

For a quick video tutorial click [here](#)

How to:

In order to add a service to multiple clients at once, all clients need to be in the same program.

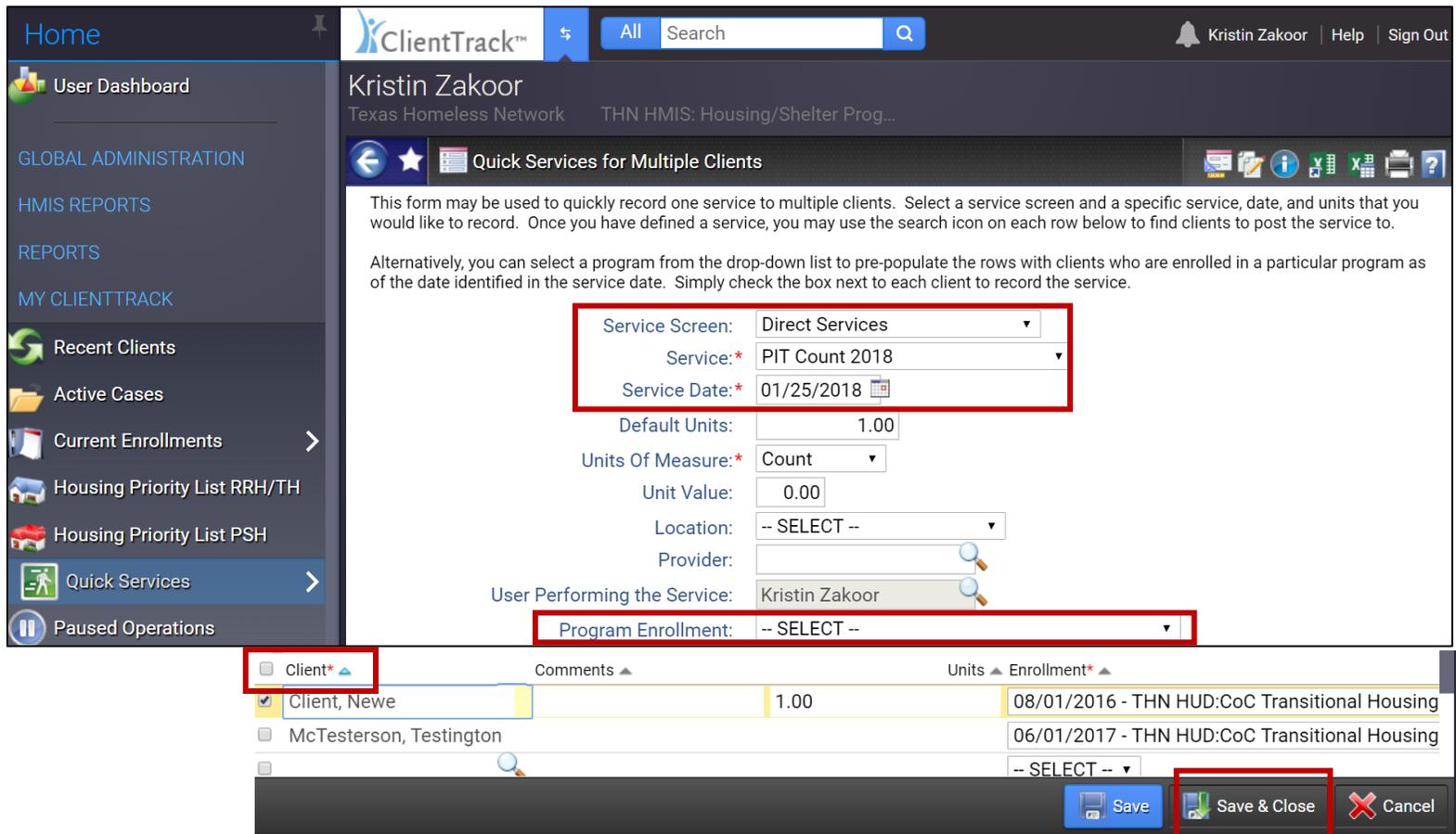
1. Start off in your "Home" work space and click on "MY CLIENTTRACK"
  - a. Hover over "Quick Services" and select "Quick Services-Multiple Clients."



The screenshot shows the ClientTrack web application interface. On the left sidebar, the 'MY CLIENTTRACK' menu item is highlighted with a red box and a '1'. Below it, the 'Quick Services' menu item is highlighted with a red box and a '2'. A dropdown menu is open from 'Quick Services', with 'Quick Services - Multiple Clients' highlighted by a red box and a '3'. The main content area shows a dashboard for Kristin Zakoor with a table of 'Current Program Enrollments' and a bar chart.

Program	Cases	Clients
Texas BoS Coordinated Entry	4	5
THN ESG Emergency Shelter	5	5
THN ESG Homelessness Prevention	1	1
THN ESG Rapid Re-Housing	1	1
Transitional Housing	2	2
THN PATH Street Outreach	2	2

2. On “Quick Service” screen, you will need to select the following:
  - a. Service Screen- “Direct Service”
  - b. Service- “PIT Count 2018” (once selected, “Default units” and “Unit of Measure” should auto-populate)
  - c. Service Date- “1/25/18”
  - d. Program Enrollment-“Choose your specific program”
  
3. Selecting Clients
  - a. You want to make sure you are selecting only the clients that are enrolled in the program AND have completed a PIT survey.
  - b. You may select clients in one of two ways:
    - i. If all the clients enrolled in the program completed the PIT survey then you can do a mass select of everyone by clicking on the box that has Client\* next to it.
    - ii. If you need to select one client at a time from the list, do so by clicking on the box before their name.
    - iii. Once finished selecting clients, click “Save and Close.”



The screenshot displays the 'Quick Services for Multiple Clients' form in the ClientTrack application. The form is titled 'Quick Services for Multiple Clients' and includes the following fields:

- Service Screen: Direct Services
- Service\*: PIT Count 2018
- Service Date\*: 01/25/2018
- Default Units: 1.00
- Units Of Measure\*: Count
- Unit Value: 0.00
- Location: -- SELECT --
- Provider: [Searchable field]
- User Performing the Service: Kristin Zakoor
- Program Enrollment: -- SELECT --

Below the form is a table of clients with checkboxes for selection. The table has columns for Client\*, Comments, Units, and Enrollment\*.

Client*	Comments	Units	Enrollment*
<input checked="" type="checkbox"/> Client, Newe		1.00	08/01/2016 - THN HUD:CoC Transitional Housing
<input type="checkbox"/> McTesterson, Testington			06/01/2017 - THN HUD:CoC Transitional Housing
<input type="checkbox"/>			-- SELECT --

At the bottom of the form, there are three buttons: Save, Save & Close, and Cancel. The 'Save & Close' button is highlighted with a red box.