

Managing Services for the SLVCEH - Housing Prioritization (HAST) enrollment

Reminder:

To keep an SLVCEH - Housing Prioritization (HAST) enrollment open, a service must be added at least once every 31 days to demonstrate active engagement.

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Methods for Adding Services

1. From Client Enrollment

This is the standard method taught in new end-user training.

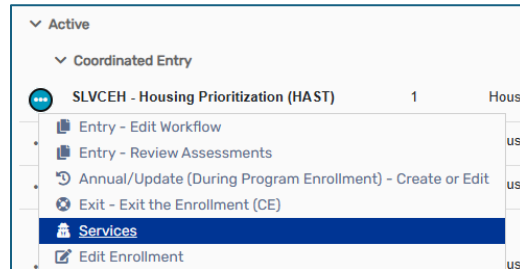
Step 1:

Navigate to the client's dashboard and locate the **SLVCEH - Housing Prioritization (HAST)** enrollment.

Enrollment Description	Active Household Members	Household Type	Project Start Date
<ul style="list-style-type: none"> ▼ Active <ul style="list-style-type: none"> ▼ Coordinated Entry 			
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ⋮ SLVCEH - Housing Prioritization (HAST) 	1	Household without Children	06/10/2026

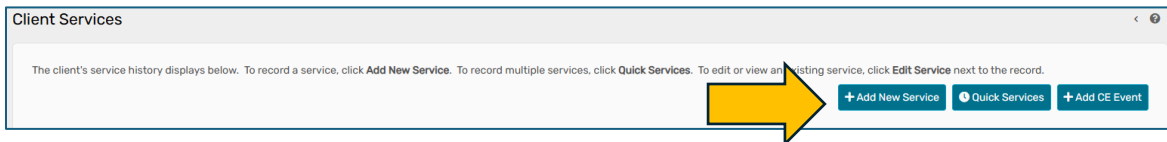
Step 2:

Click the **three little dots** next to the enrollment name and select Services.

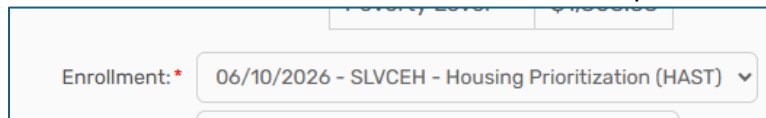


Step 3:

Click **Add New Service**.



Important: Ensure the correct enrollment is selected in the dropdown.



Step 4:

Select the service by typing "**SLV**" to quickly filter results and click **Save**.

Grant: -- SELECT --

Service: * SLVCEH - Housing Prioritization Continued Engagement

Date: * 06/11/2026

2. Quick Services (Client Workspace)

Use this option to add services directly from the client's service menu.

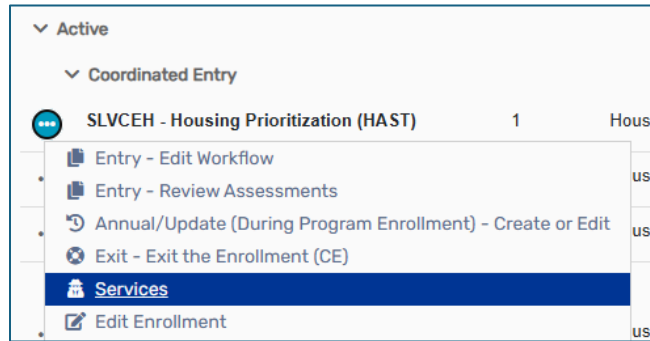
Step 1:

Navigate to the client's dashboard and locate the **SLVCEH - Housing Prioritization (HAST)** enrollment.

Enrollment Description	Active Household Members	Household Type	Project Start Date
<ul style="list-style-type: none"> ▼ Active <ul style="list-style-type: none"> ▼ Coordinated Entry 			
<ul style="list-style-type: none"> <ul style="list-style-type: none"> <ul style="list-style-type: none"> ⋮ SLVCEH - Housing Prioritization (HAST) 	1	Household without Children	06/10/2026

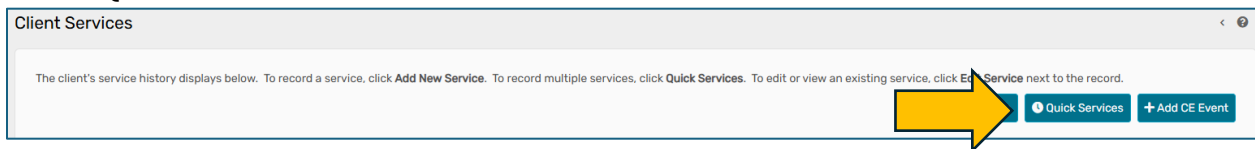
Step 2:

Click the **three little dots** next to the enrollment name and select **Services**.



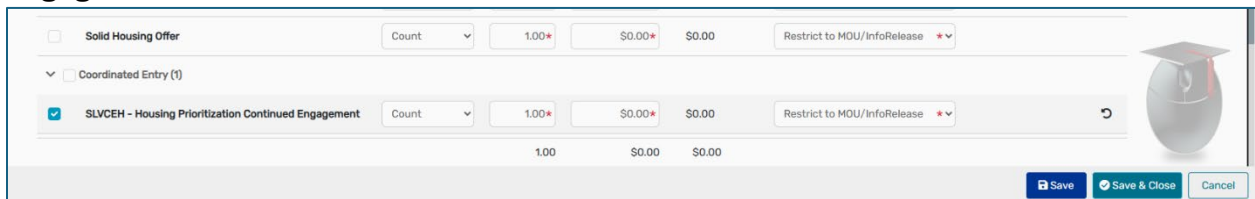
Step 3:

Select Quick Services.



Step 4:

Under Coordinated Entry, select "**SLVCEH - Housing Prioritization Continued Engagement**".



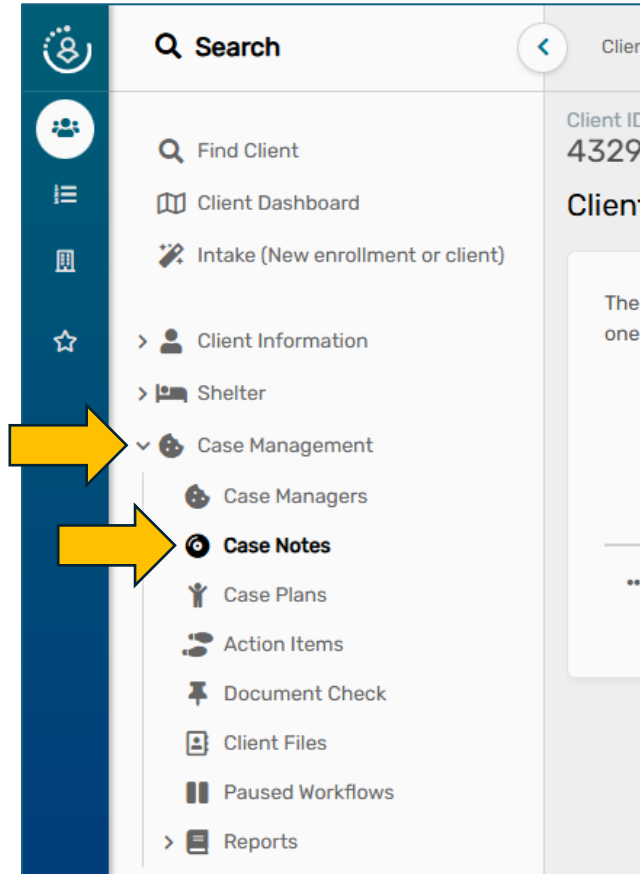
Click **Save and close**.

3. Case Notes (Multiple Enrollments)

This method allows you to add services to different enrollments simultaneously while documenting a case note.

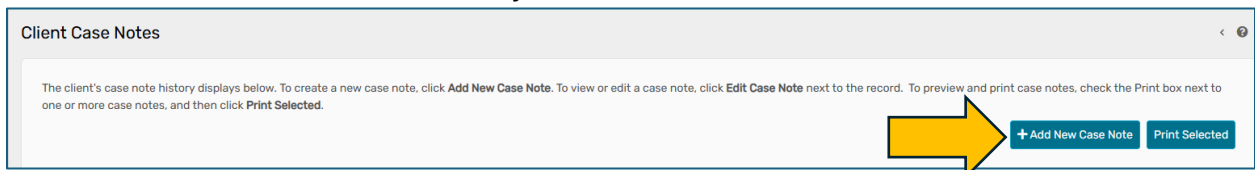
Step 1:

Go to the client's Case Management menu and select Case Notes.



Step 2:

Click **Add New Case Note** and enter your note.



Managing Services for the SLVCEH – Housing Prioritization (HAST) Enrollment

Step 3:

Instead of using a default enrollment, go to the services section at the bottom.

The screenshot shows the 'Services' section of a form. At the top, there is a 'Default Enrollment' dropdown menu with the text '-- SELECT --' and a red 'X' over it. Below this, there is a table with columns for 'Service', 'Enrollment', and 'Units Of Measure'. The 'Enrollment' column for the first row is highlighted with a green box and contains the text '-- SELECT --'.

Step 4:

Select the first service and its corresponding enrollment (e.g., Case Management for an emergency shelter).

Step 5:

Add a second service by typing "SLV" and selecting the **SLVCEH - Housing Prioritization (HAST)** enrollment.

The screenshot shows the 'Services' section of a form. At the top, there is a 'Default Enrollment' dropdown menu with the text '-- SELECT --'. Below this, there is a table with columns for 'Service', 'Enrollment', 'Units Of Measure', 'Unit Value', and 'Units'. The table contains two rows of services:

Service	Enrollment	Units Of Measure	Unit Value	Units
<input checked="" type="checkbox"/> Case Management	11/02/2025 - STH - MVP Emergency Shelter	Minutes	\$0.00	30.00
<input checked="" type="checkbox"/> SLVCEH - Housing Prioritization Continued Engagement	06/10/2026 - SLVCEH - Housing Prioritization (HAST)	Count	\$0.00	1.00
<input type="checkbox"/> -- SELECT --	-- SELECT --	-- SELECT --	*	*

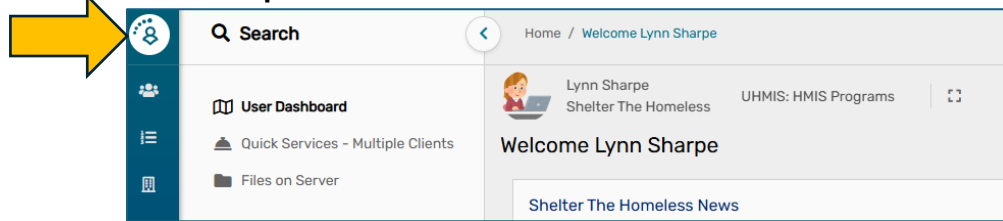
Click **Save**.

4. Quick Services (Home Workspace)

This is the most efficient way to add services for multiple clients at once.

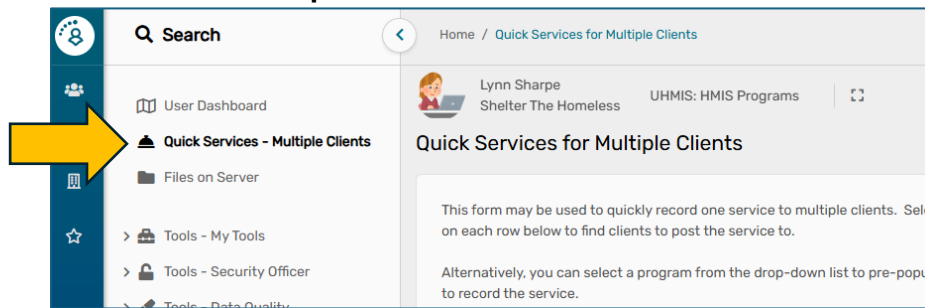
Step 1:

Click the **Home Workspace**.



Step 2:

Select **Quick Services for Multiple Clients**.

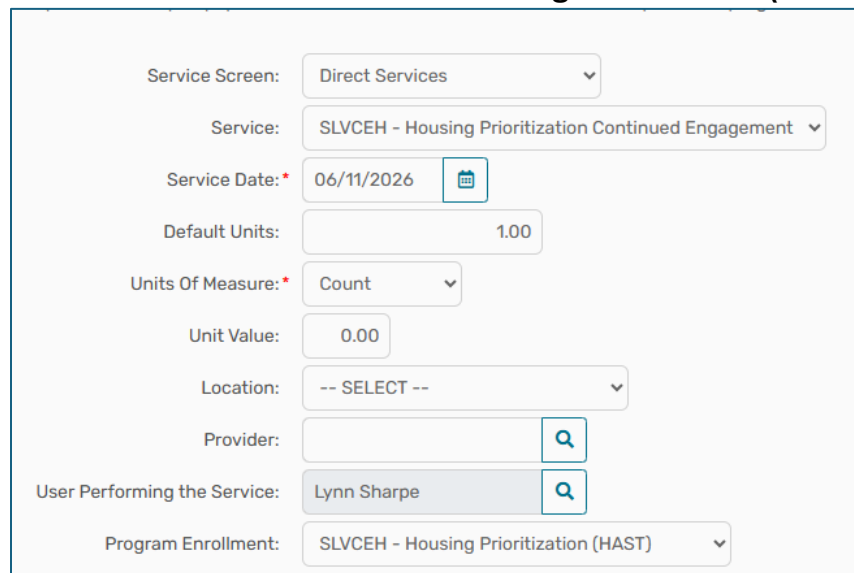


Step 3:

Under the Services screen, select **Direct Services** and find the **SLVCEH - Housing Prioritization Continued Engagement** service.

Step 4:

Pick the service date and select the **SLVCEH - Housing Prioritization (HAST)** enrollment.

A screenshot of a service configuration form. The fields are: Service Screen: Direct Services (dropdown); Service: SLVCEH - Housing Prioritization Continued Engagement (dropdown); Service Date: 06/11/2026 (calendar icon); Default Units: 1.00 (input); Units Of Measure: Count (dropdown); Unit Value: 0.00 (input); Location: -- SELECT -- (dropdown); Provider: (input with search icon); User Performing the Service: Lynn Sharpe (input with search icon); Program Enrollment: SLVCEH - Housing Prioritization (HAST) (dropdown).

Managing Services for the SLVCEH – Housing Prioritization (HAST) Enrollment

A list of every client enrolled in that program at your agency will appear; select all applicable clients.

The screenshot shows a web application interface for managing client enrollments. At the top, it says "Program Enrollment: SLVCEH - Housing Prioritization (HAST)" and "6 results found (+5)". Below this is a table with the following columns: Client ID, Comments, Units, Enrollment, and Restriction. The table contains several rows, some of which are checked. The bottom of the interface has three buttons: "Save", "Save & Close", and "Cancel".

Client ID	Comments	Units	Enrollment	Restriction
<input checked="" type="checkbox"/> Austin, Steve *		1.00	06/10/2026 - SLVCEH - Housing Prioritization (HAST) *	Restrict to MOU/InfoRelease
<input type="checkbox"/> banana, cde *			06/08/2026 - SLVCEH - Housing Prioritization (HAST) *	Restrict to MOU/InfoRelease
<input type="checkbox"/> Cena, John *			06/10/2026 - SLVCEH - Housing Prioritization (HAST) *	Restrict to MOU/InfoRelease
<input checked="" type="checkbox"/> McGo, HASTY *		1.00	06/10/2026 - SLVCEH - Housing Prioritization (HAST) *	Restrict to MOU/InfoRelease
<input checked="" type="checkbox"/> spellman, hilda *		1.00	06/10/2026 - SLVCEH - Housing Prioritization (HAST) *	Restrict to MOU/InfoRelease
<input type="checkbox"/> spellman, sabrina *			06/10/2026 - SLVCEH - Housing Prioritization (HAST) *	Restrict to MOU/InfoRelease
<input type="checkbox"/> [Search] *			-- SELECT -- *	Restrict to MOU/InfoRelease
<input type="checkbox"/> [Search] *			-- SELECT -- *	Restrict to MOU/InfoRelease
<input type="checkbox"/> [Search] *			-- SELECT -- *	Restrict to MOU/InfoRelease

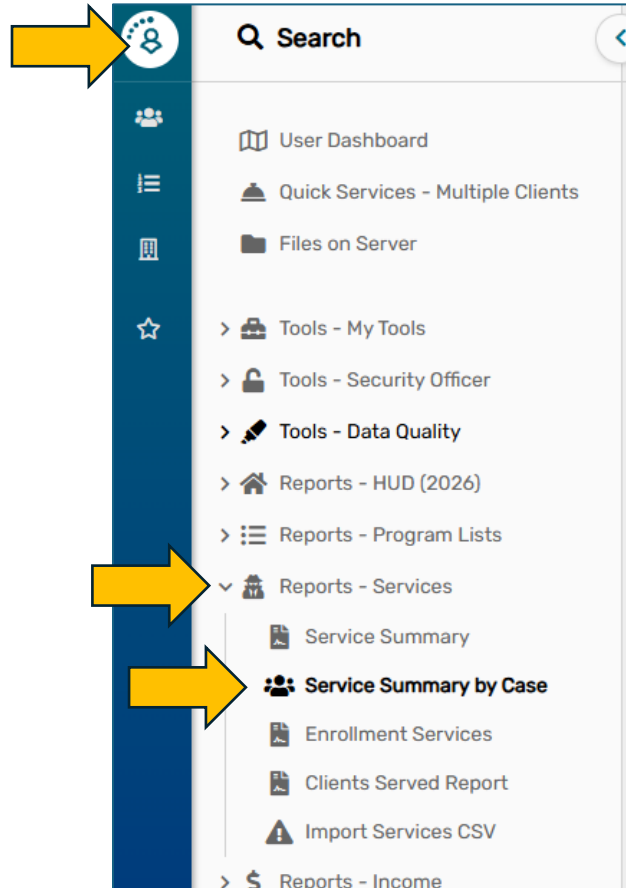
Click **Save and Close**.

Monitoring Service Entry with Services Summary

Use reports to verify that services have been recorded for all clients before the end of the month.

Step 1:

In the **Home Workspace**, navigate to **Reports - Services > Service Summary by Case**.



Step 2:

Set the timeframe (e.g., the current month) and select your organization.

Date Range

Indicate the time period for this report. Only records that fall within the date range you select will be included.

Predefined Date Range:

Service Date Between: * and

Managing Services for the SLVCEH – Housing Prioritization (HAST) Enrollment

Organization(s)

Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. *Note: The list only shows organizations you are authorized to view.*

Organization(s): Shelter The Homeless
SLCo SAMI Community Navigation Program
Soap2Hope
South Valley Sanctuary
Southern Association of Community...

Step 3:

Check “Program(s)” and select **SLVCEH - Housing Prioritization (HAST)**.

Program(s)

Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the icon to select all.

Program(s): Filter by Program(s)

UWC - IANF-KHH
SHSS ES '24-'27
SLVCEH - Coordinated Intake
 SLVCEH - Housing Prioritization (HAST)
STH - Atkinson Men's HRC

Step 4:

Check “Services,” use **Ctrl+F** and type **"SLVC"** to find the specific service quickly.

Service Summary Report by Case

Services

Select the specific services for the report, or leave the field blank to run the report for all services. *NOTE: The services in this list are filtered according to the organizations and funding sources selected above.*

Services: Filter by Services

Shower (621)
Shower (738)
 SLVCEH - Housing Prioritization Continued Engagement (990)
Smoking Cessation Class (634)
SOAR Application Filed (681)

Step 5:

(Optional) Check “User(s)” and select the **User** if you only want to see services you personally entered.

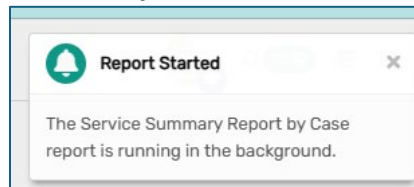
User(s)

Check the box to limit report results by selected users. When checked, the list displays users that belong to the organizations you selected above. Indicate which users should be included in the report by selecting each user separately, or click the icon to select all.

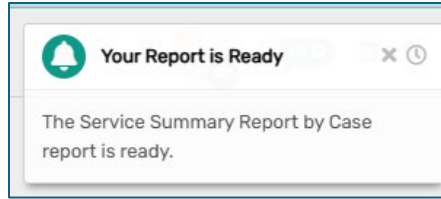
User(s): Filter by User(s)

Step 6:

Click Report, wait for it to process, then you can view the summary.



Managing Services for the SLVCEH – Housing Prioritization (HAST) Enrollment



Service Summary Report by Case

6/1/2026 to 6/30/2026

Report Criteria:
 Organizations: Shelter The Homeless
 Services: SLVCEH - Housing Prioritization Continued Engagement (990)
 Programs: SLVCEH - Housing Prioritization (HAST)
 First Time Served: N/A

Service	Service Entries	Units	Total Value	Undup. Clients	Total Cases	Children in Cases	Adults in Cases	Seniors in Cases	Total Individuals in Cases
SLVCEH - Housing Prioritization Continued Engagement	5	5.00	\$0.00	2	2	1	2	0	3
Duplicated Total	5	5.00	\$0.00	2	2	1	2	0	3
Unduplicated Totals	5	5.00	\$0.00	2	2	1	2	0	3

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Step 7:

Click on the service name in the results will show a detailed list of clients and their service dates.

Service	Service Entries	Units	Total Value
<u>SLVCEH - Housing Prioritization Continued Engagement</u>	5	5.00	\$0.00
Duplicated Total	5	5.00	\$0.00

Managing Services for the SLVCEH – Housing Prioritization (HAST) Enrollment

SLVCEH - Housing Prioritization Continued Engagement

1 of 1

Search Find | Next

ClientTrack
BY CASEWORTHY

Service Summary by Case
6/1/2026 to 6/30/2026

Report Criteria:

Organizations: Shelter The Homeless
 Services: SLVCEH - Housing Prioritization Continued Engagement (990)
 Programs: SLVCEH - Housing Prioritization (HAST)

First Time Served: N/A

SLVCEH - Housing
 Prioritization Continued
 Engagement

Client Name	Service Date	Units	Total Value	Undup. Clients	Total Cases	Children in Cases	Adults in Cases	Seniors in Cases	Total Individual Cases
spellman, hilda	6/10/2026	1.00	\$0.00	1	1	1	1	0	2
McGoo, HASTY	6/11/2026	1.00	\$0.00	1	1	0	1	0	1
McGoo, HASTY	6/11/2026	1.00	\$0.00	1	1	0	1	0	1
McGoo, HASTY	6/11/2026	1.00	\$0.00	1	1	0	1	0	1
McGoo, HASTY	6/12/2026	1.00	\$0.00	1	1	0	1	0	1
Unduplicated Totals		5.00	\$0.00	2	2	1	2	0	3