Coordinated Entry Data Entry Quick Access Guide
Adding a Provider and Linking the Provider to a CE-Service/CE-Referral

To Add a Provider To a Referral
- To Add a Provider To Your List of Providers

Providers must be set up to attach them to referrals. Follow the steps below to add a provider to the Provider database for use when documenting referrals.

- Click on the blue box next to the **"ClientTrack"** logo as outlined below to switch to the **"Providers"** screen.
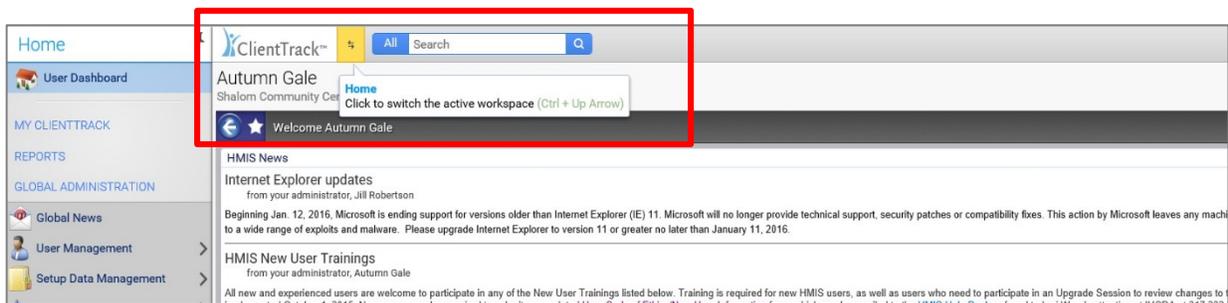
- Select the **"Providers"** box to the far right; you will see three options labeled, **"Home", "Clients", and "Providers."** Click on the white box labeled **"Providers"** to go to the Providers screen.
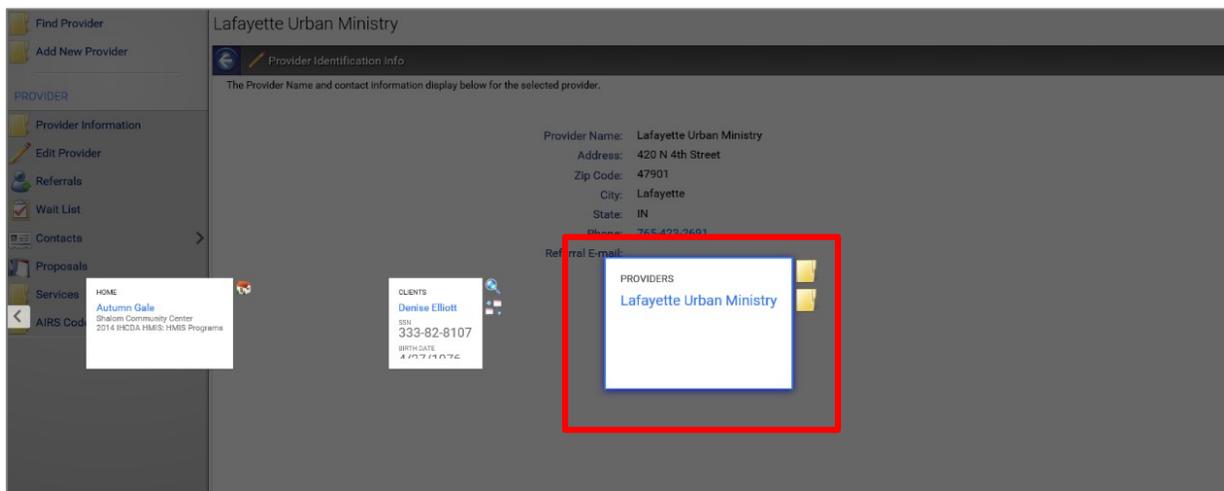

- It is always important to search to see if a Provider has already been added. You will search by clicking the **"Find Provider"** link in the upper left-hand corner of the screen and entering a Provider name. Do not change the Provider Type when completing the search. If the Provider has already been added, confirm the address, phone, etc. It is acceptable to have the Providers with the same name but differing addresses, phone, etc. For example, if adding a provider such as a utility company, the company may be listed more than once with different locations.
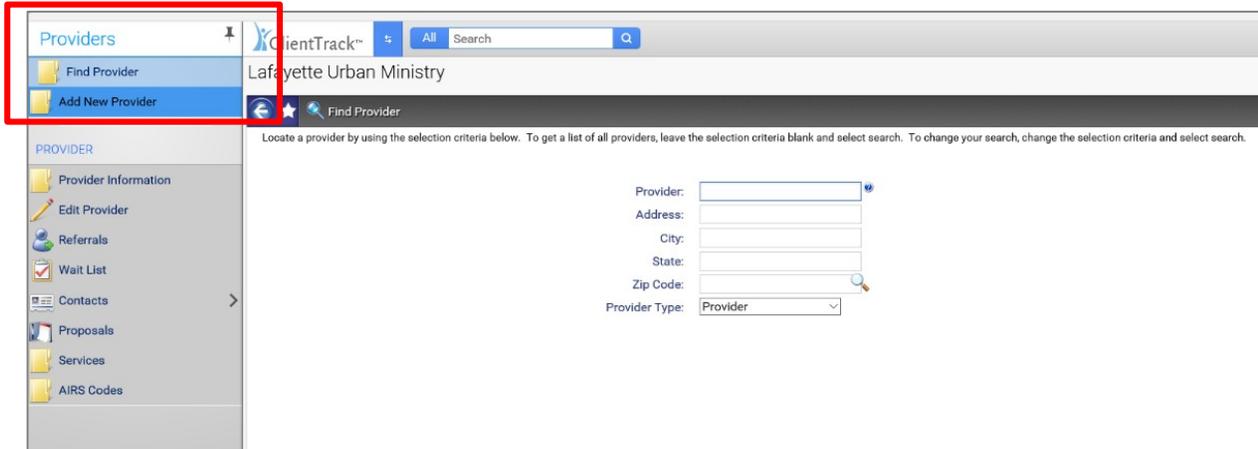
- **If you do not find the Provider when you search, move on to the next steps.**
- Click on **"Add New Provider"** below the "Find Provider" link in the far upper left-hand corner of the screen.
- Complete the provider information. You must complete information that has a red asterisk * before continuing.
- Click **"Next"** in the bottom right-hand corner of the screen.
- Complete **"Referral Contact"** information.
- Click on **"Finish"** to complete the addition of a Provider to your searchable list.

After adding the provider to the provider database through the above steps, *you need to complete one more step before you can access the provider when setting up referrals and services.*

You must correlate a service with the provider and you can do this by remaining on the provider record and clicking on **"Services"** in the list of Menu Items found on the left-hand side of the screen. Click on **"Add Provider Service"** and select a CE-Service/CE-Referral you want correlated with the provider. You can add as many services/referrals as you would like.
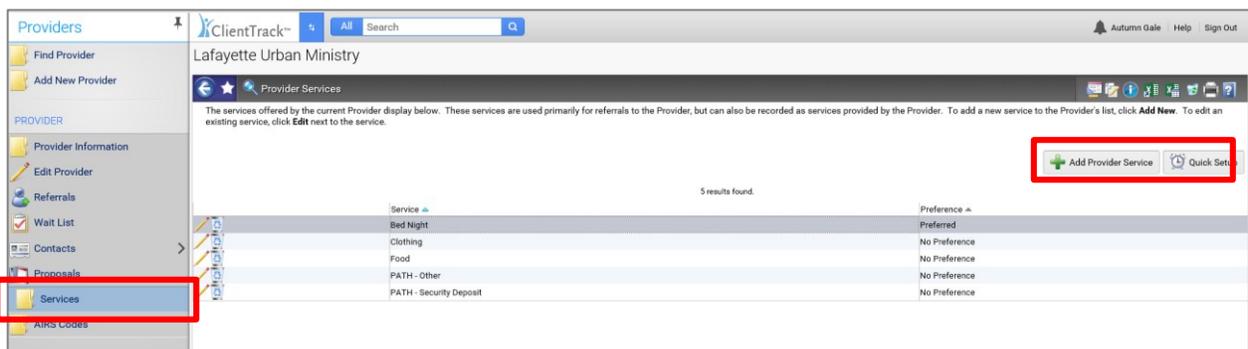
Once you have finished this final step, you will be able to select the provider when creating a referral or service.

If you need any assistance with adding a provider to a service, contact the help desk by e-mailing HMISHelpDesk@ihcda.in.gov