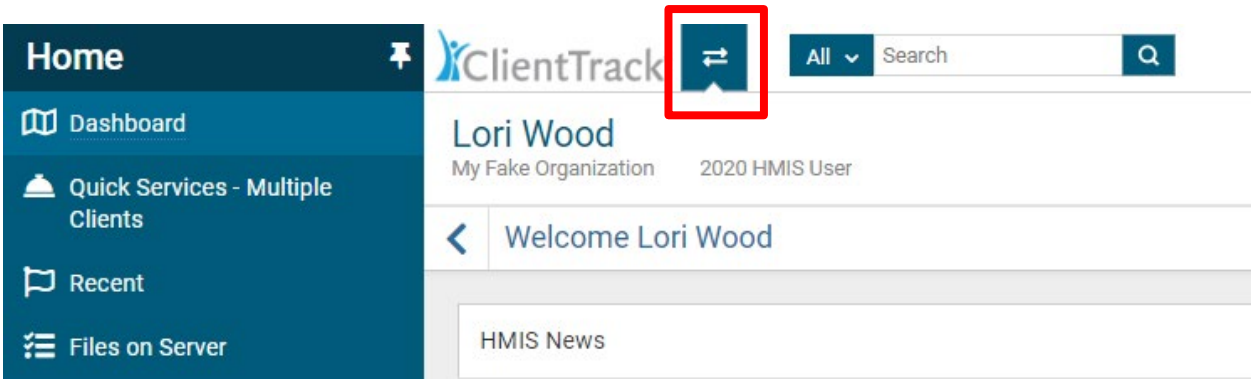
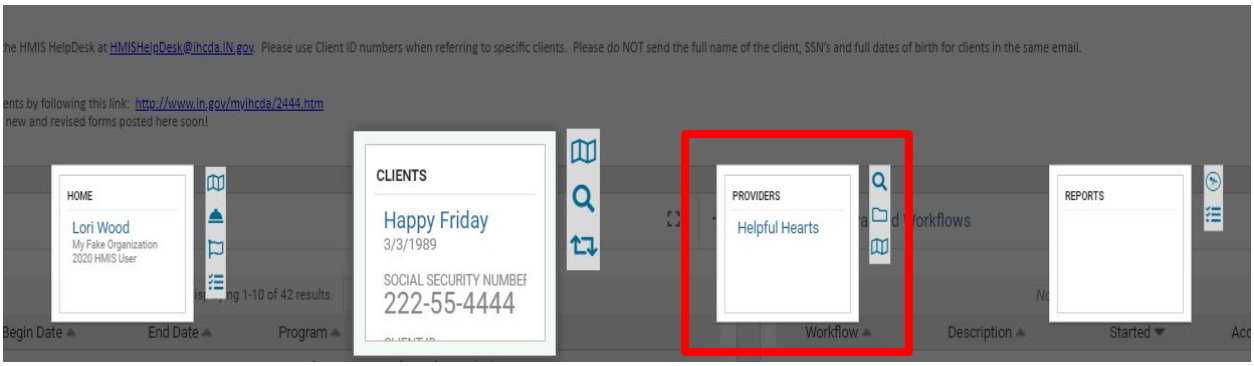
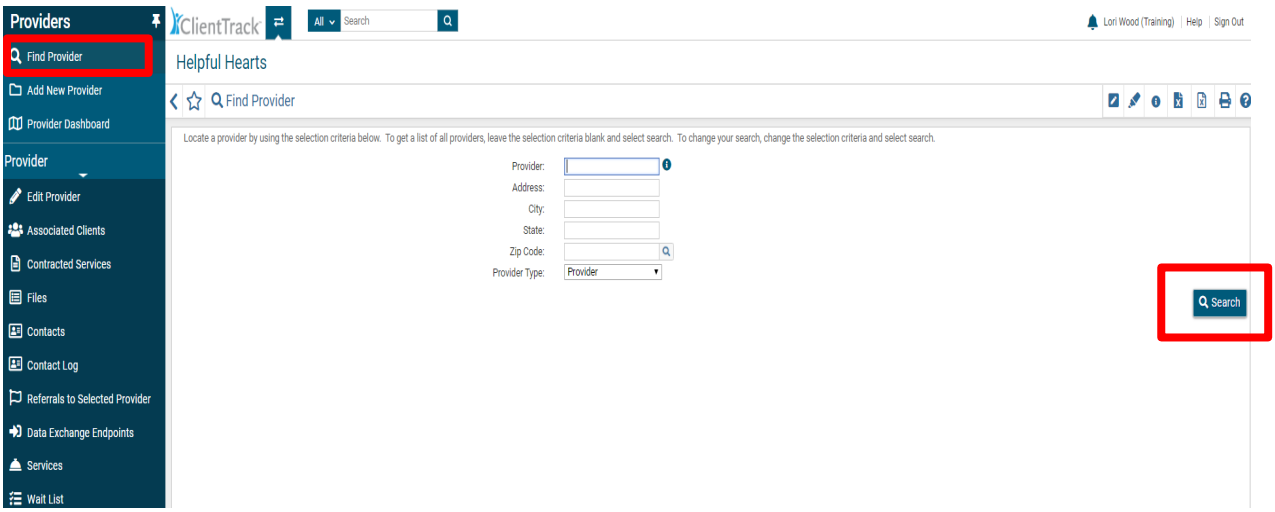
How to Add a Provider for Referrals

1. From the **"HOME"** workspace screen, click on the double arrow icon to the right of the ClientTrack logo to access the **"Workspace"** options.

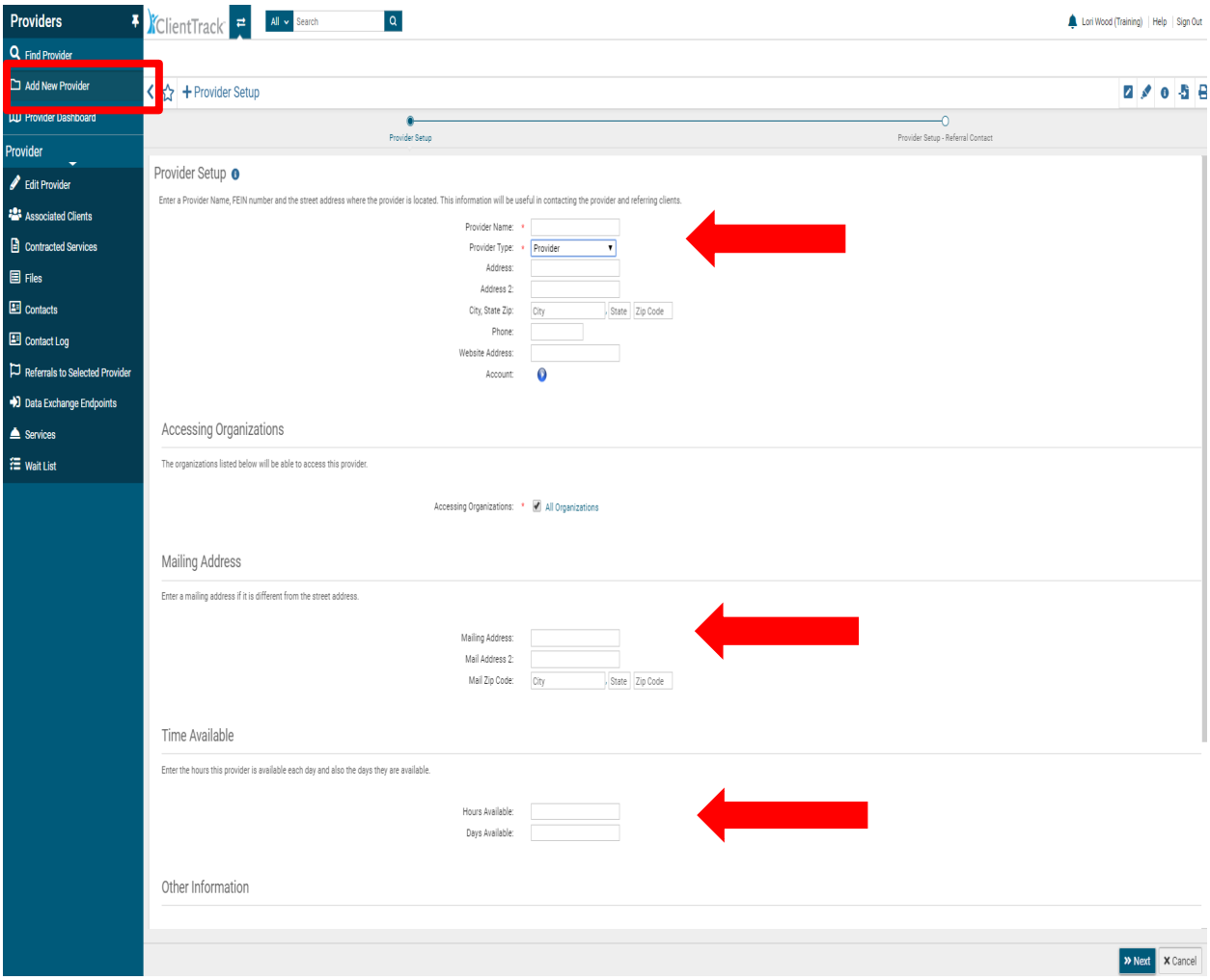


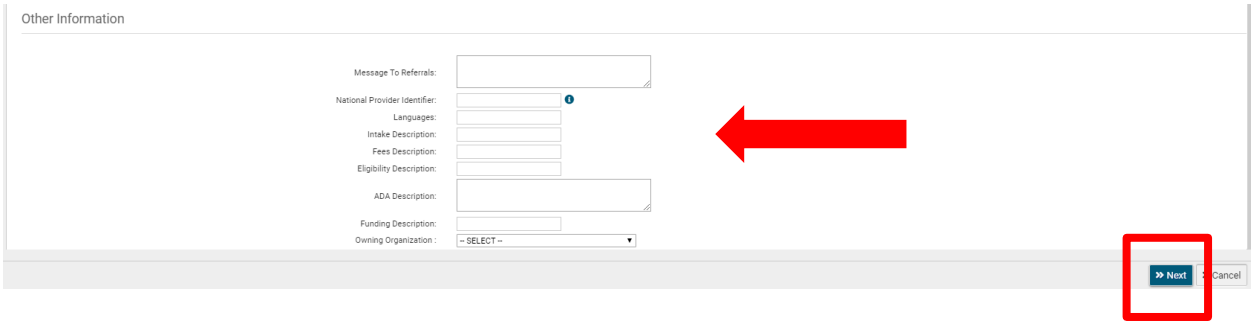


2. Click on the **"PROVIDERS"** workspace option as displayed above.
3. Conduct a search for the Provider by clicking on **"Find Provider"** located in the menu on the left-hand side of the page.
4. Type in the name of the Provider and click **"Search"**.

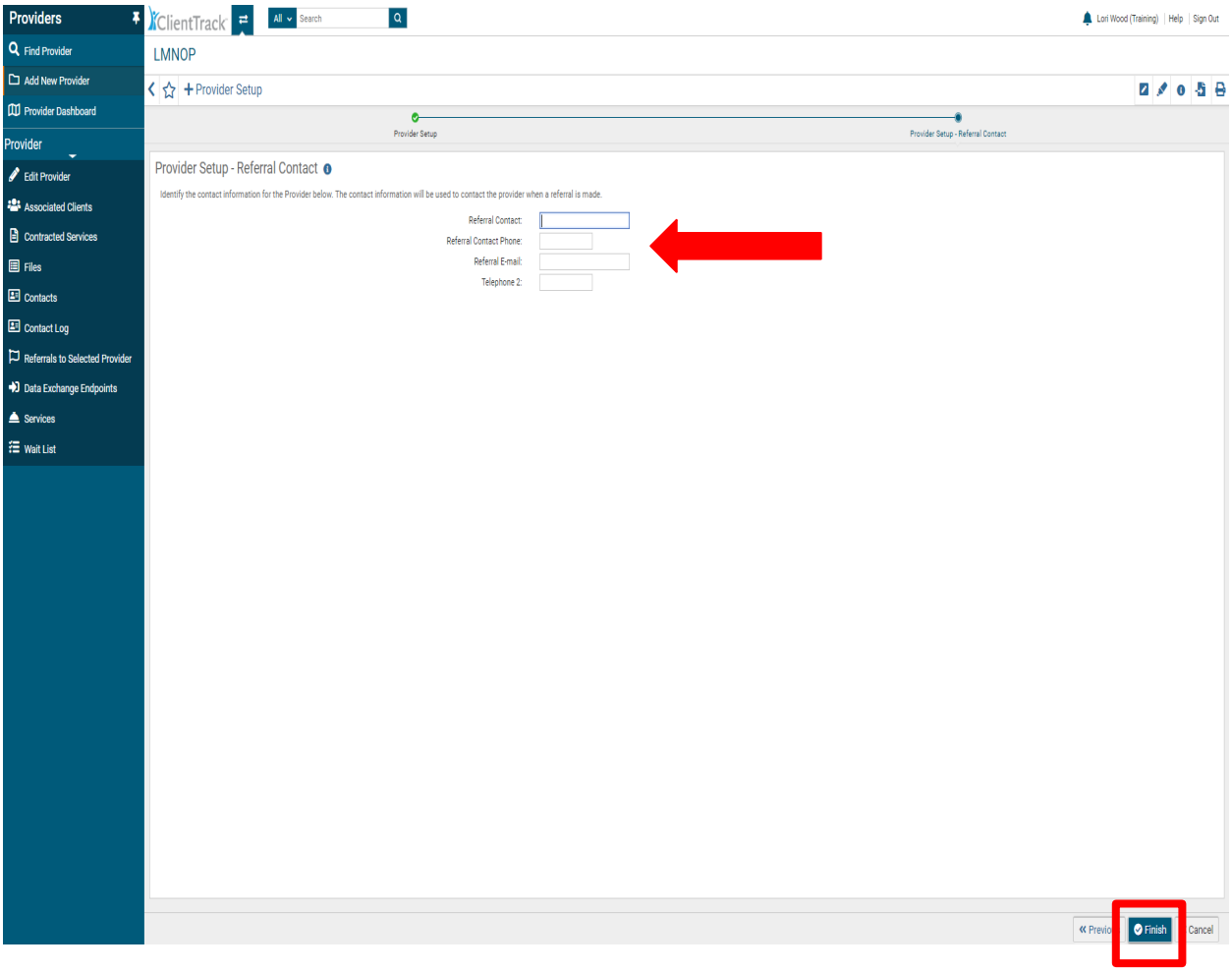


5. Once you determine the Provider is not in the system, click **"Add New Provider"** located in the menu on the left-hand side of the page.
6. Enter the **"Provider Name"**, choose the **"Provider Type"** from the drop-down menu, then complete the **"Mailing Address", "Time Available"**, and **"Other Information"** fields.
7. Click **"Next"** in the bottom right corner of the screen.

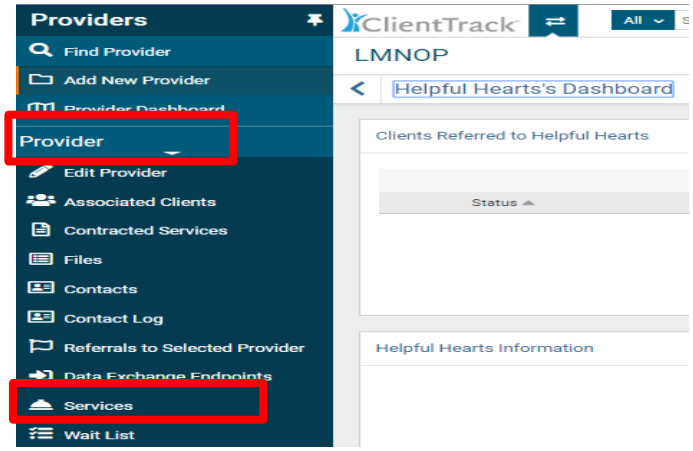




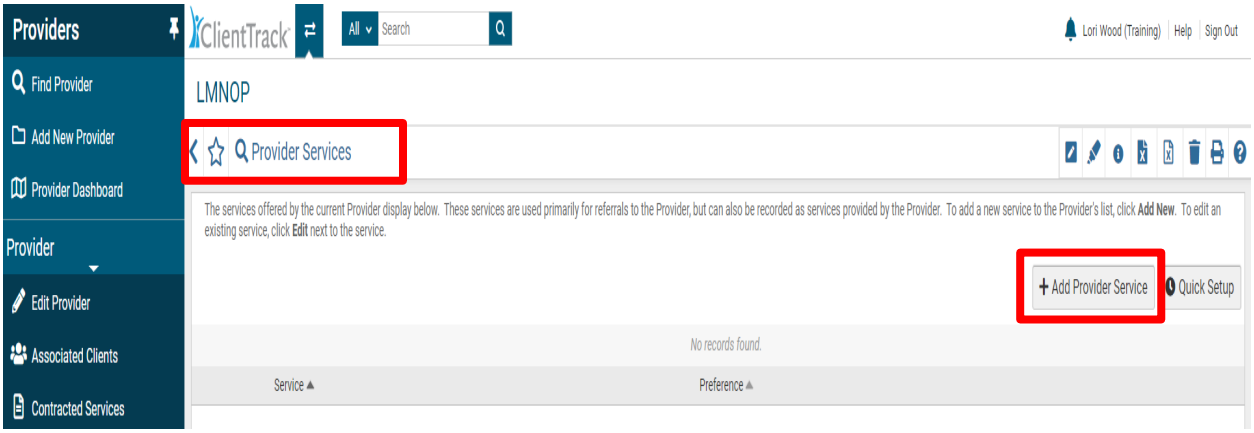
8. **Provider Setup-Referral Contact**: Enter the **"Referral Contact"** name, phone number and email address, then click **"Finish"** in the bottom right corner of the screen.



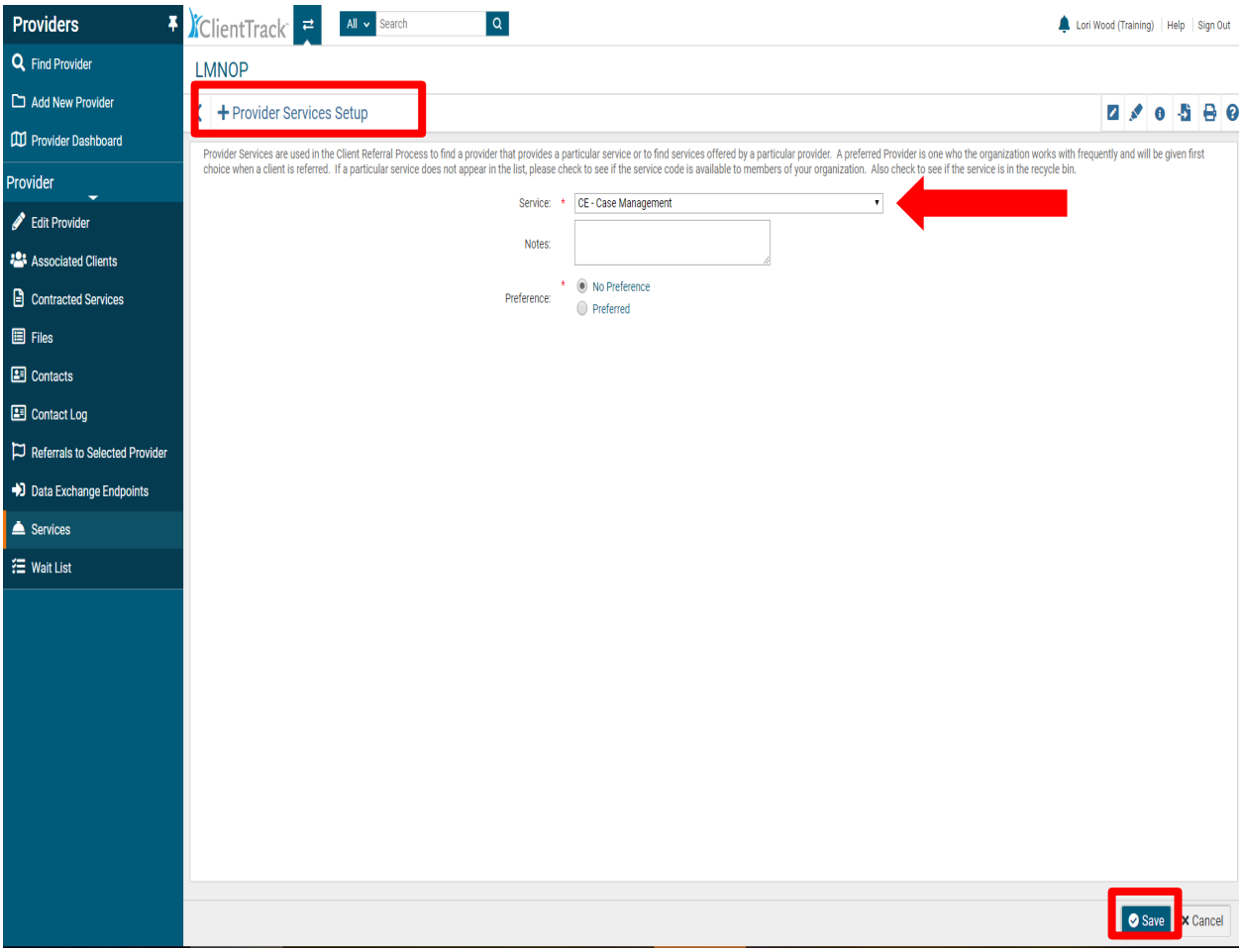
9. **Setting up "Services" for "Provider Referrals":** At least one service must be attached to the Provider's record. To attach service(s) to the Provider's record:
   a. Click on **"Provider"** located in the menu on the left-hand side of the screen. An additional menu will display below the **"Provider"** option. Next click **"Services"**



10. From the **"Provider Services"** screen, click **"Add Provider Service"**.



11. From the **"Provider Services Setup"** screen, click the **"Service"** drop down arrow to choose the service. After selecting the **"Service"** from the drop-down menu, click **"Save"** in the bottom right corner of the screen.



The Provider, Referral, and Service are now available for use in HMIS. Please contact the HMIS help desk if you need additional assistance at: HMIShelpdesk@ihcda.in.gov