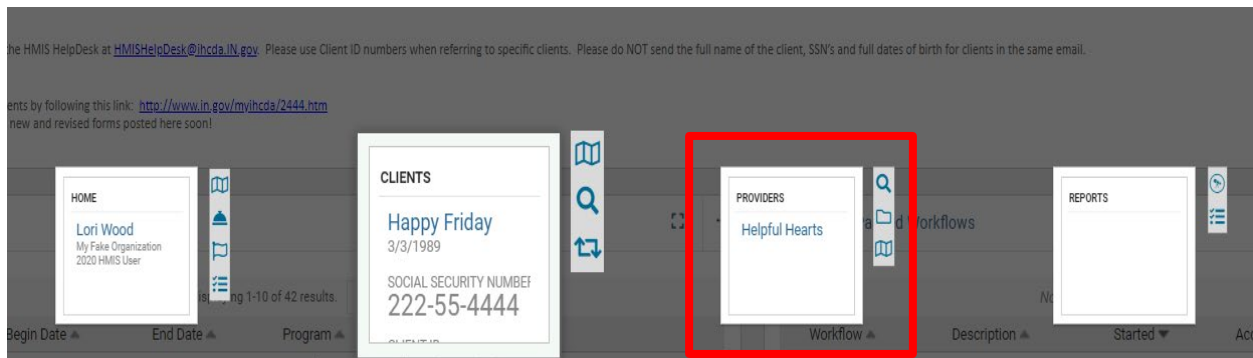
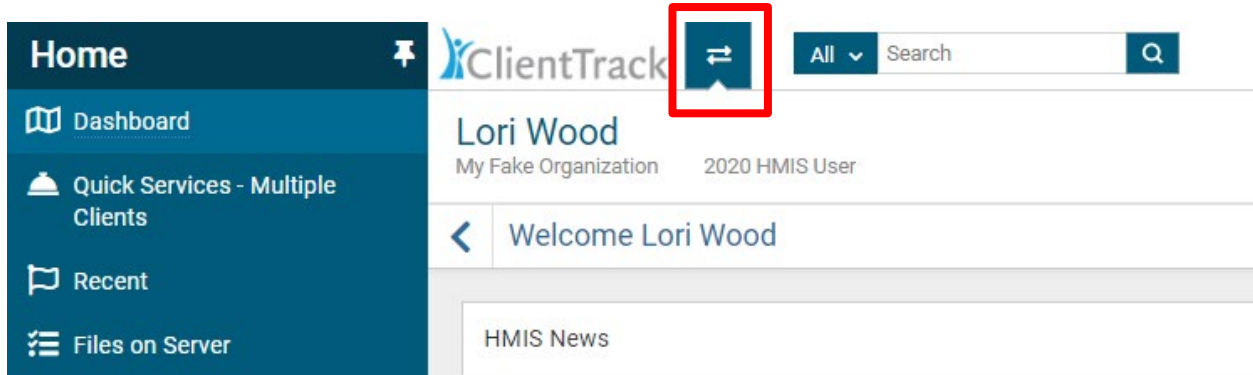
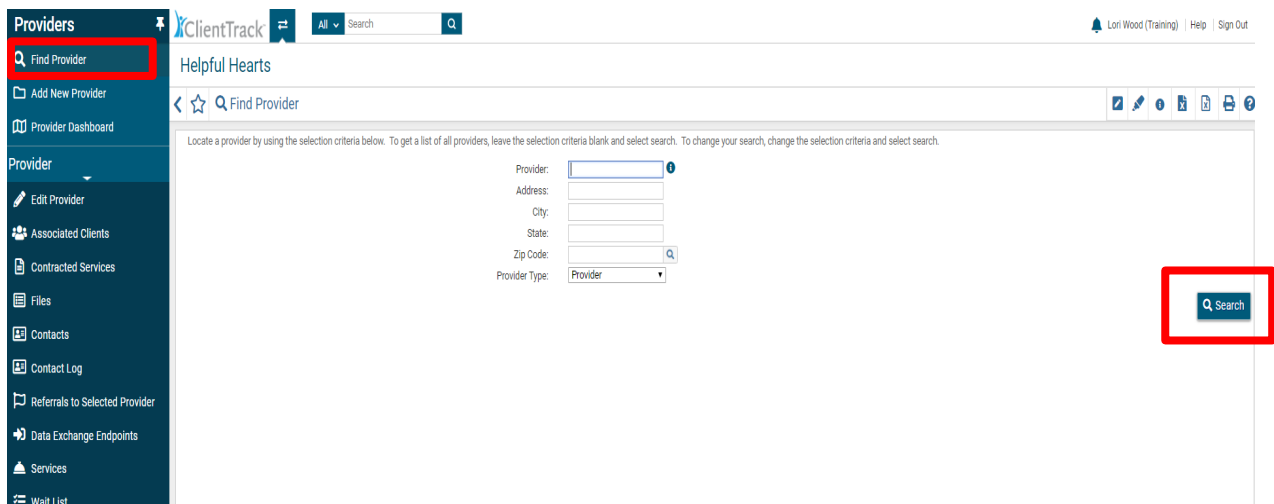


## How to Add a Provider for Referrals

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"**.



- 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.
- Enter the **"Provider Name"**, choose the **"Provider Type"** from the drop-down menu, then complete the **"Mailing Address"**, **"Time Available"**, and **"Other Information"** fields.
- Click **"Next"** in the bottom right corner of the screen.

The screenshot displays the 'Add New Provider' form in the ClientTrack system. The left-hand navigation menu is visible, with 'Add New Provider' highlighted. The main form area is titled 'Provider Setup' and contains several sections: 'Provider Setup', 'Accessing Organizations', 'Mailing Address', 'Time Available', and 'Other Information'. Red arrows point to the 'Provider Name' field, the 'Mailing Address' section, the 'Time Available' section, and the 'Other Information' section. A red box highlights the 'Next' button in the bottom right corner of the form.

**Provider Setup**

Enter a Provider Name, FEIN number and the street address where the provider is located. This information will be useful in contacting the provider and referring clients.

Provider Name:

Provider Type:

Address:

Address 2:

City State Zip:

Phone:

Website Address:

Account:

**Accessing Organizations**

The organizations listed below will be able to access this provider.

Accessing Organizations: ☐ All Organizations

**Mailing Address**

Enter a mailing address if it is different from the street address.

Mailing Address:

Mail Address 2:

Mail Zip Code:

**Time Available**

Enter the hours this provider is available each day and also the days they are available.

Hours Available:

Days Available:

**Other Information**

Message To Referrals:

National Provider Identifier:

Languages:

Intake Description:

Fees Description:

Eligibility Description:

ADA Description:

Funding Description:

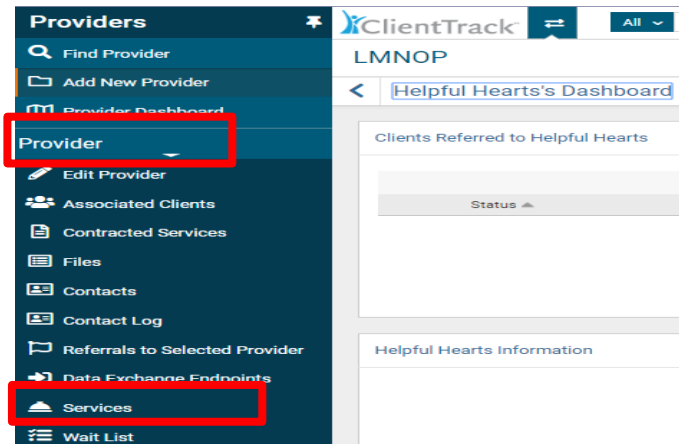
Owning Organization:

**Next** **Cancel**

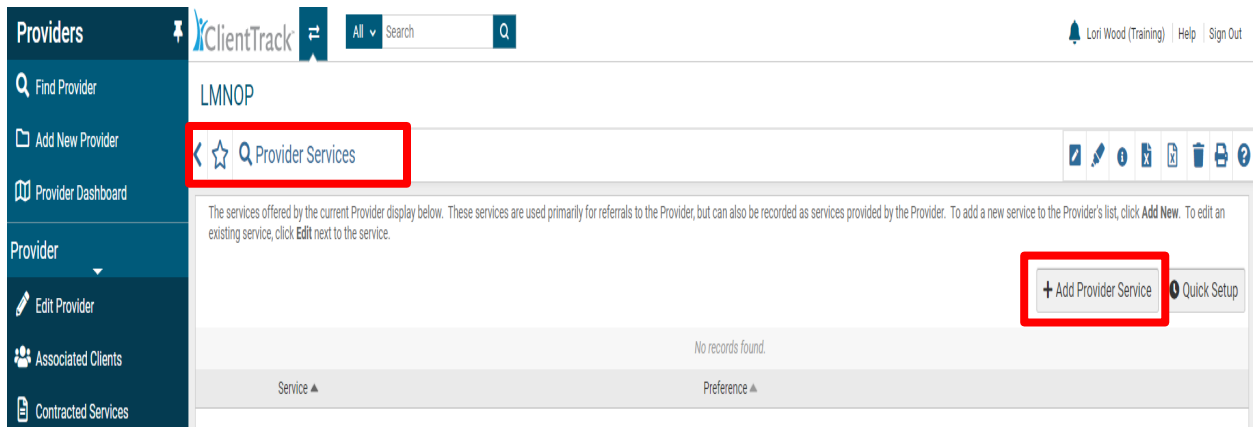
8. **Provider Setup-Referral Contact:** Enter the “Referral Contact” name, phone number and email address, then click “Finish” in the bottom right corner of the screen.

The screenshot shows the 'Provider Setup - Referral Contact' screen in the ClientTrack application. The left sidebar contains a 'Providers' menu with options like 'Find Provider', 'Add New Provider', 'Provider Dashboard', 'Edit Provider', 'Associated Clients', 'Contracted Services', 'Files', 'Contacts', 'Contact Log', 'Referrals to Selected Provider', 'Data Exchange Endpoints', 'Services', and 'Wait List'. The main content area has a progress bar at the top with 'Provider Setup' and 'Provider Setup - Referral Contact' steps. Below the progress bar, the title 'Provider Setup - Referral Contact' is followed by a description: 'Identify the contact information for the Provider below. The contact information will be used to contact the provider when a referral is made.' The form contains four input fields: 'Referral Contact', 'Referral Contact Phone', 'Referral E-mail', and 'Telephone 2'. A large red arrow points to the 'Referral Contact' field. At the bottom right, there are three buttons: 'Previous', 'Finish' (highlighted with a red box), and 'Cancel'.

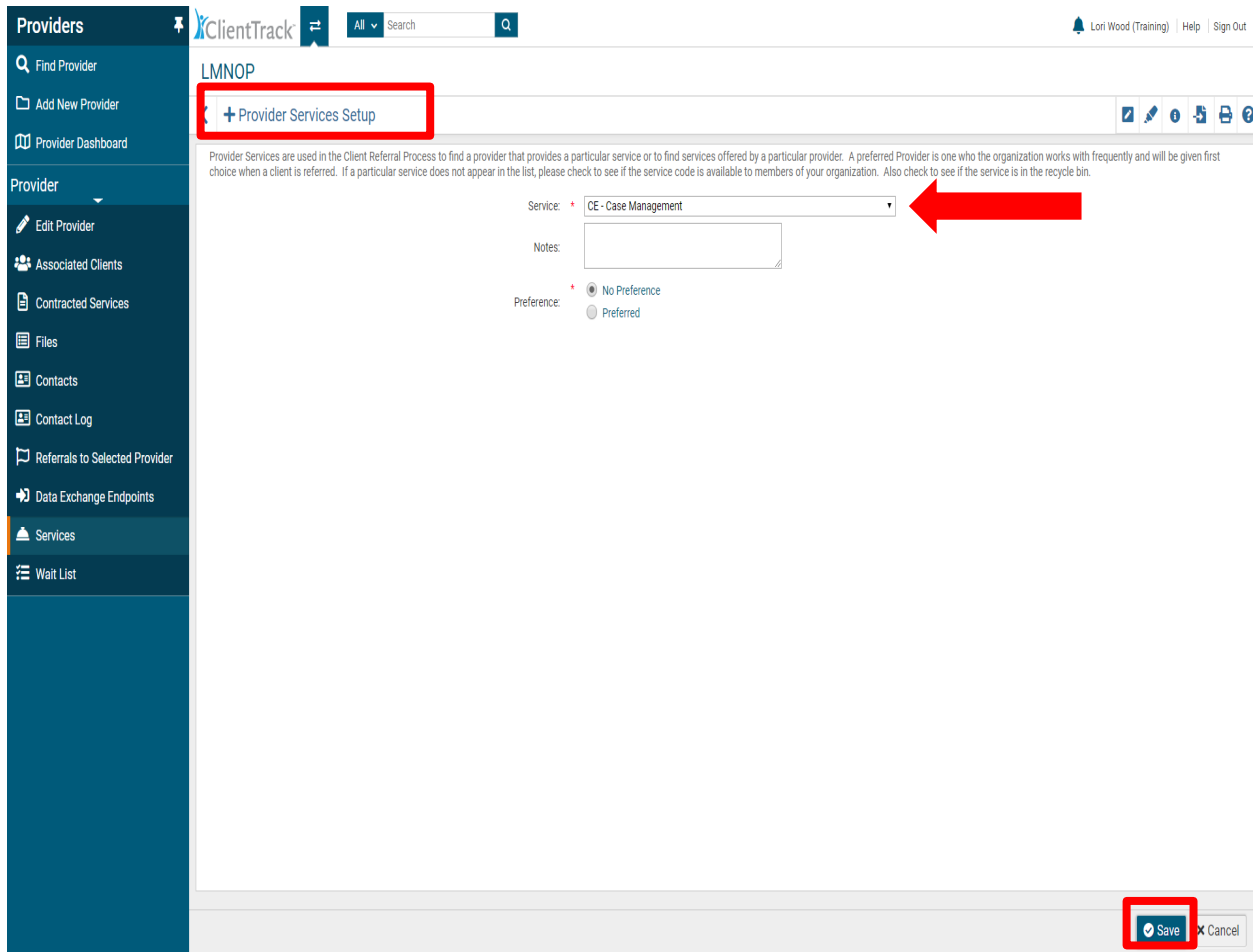
9. **Setting up “Services” for “Provider Referrals”:** At least one service must be attached to the Provider’s record. To attach service(s) to the Provider’s record:
- Click on “**Provider**” located in the menu on the left-hand side of the screen. An additional menu will display below the “**Provider**” 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](mailto:HMIShelpdesk@ihcda.in.gov)