

WELCOME TO CLIENTTRACK AND THE WORLD OF HMIS



Introductory Training, Client Intake and Basic Client Track Features.

This presentation is designed for those new to ClientTrack and HMIS.

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Important terms

- ⦿ **Organization-** Agency that receives a grant has a program and provides services.
- ⦿ **Program-** set up under a grant and provides services, usually same name as grant. You must enroll clients in programs to generate an APR for a grant.
- ⦿ **Grant-** Money given by a funding entity to a Grantee.
- ⦿ **Service-** something you provide to a client which is tied to a program
- ⦿ **Workflow-** a set of steps you need to follow to intake or exit a client from a program

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Logging In

- ⦿ To log in to the Live database go to www.clienttrack.net/modesto
- ⦿ To log into the Training database go to www.clienttrack.net/modestotest
- ⦿ After you log in make sure that at the top of the webpage it says Modesto if you are in the live database or it says Modesto Testing if you are in the training database

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Logging in

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Logging in

Modesto Testing for Training database or Modesto for live database

This is the user dashboard, and will be the first thing you see when logging into ClientTrack.

Housing Authority of the County of Stanislaus

Welcome to ClientTrack

The HMIS System for Stanislaus Housing and Support Services Collaborative (SHSSC)

Administered by the Housing Authority County of Stanislaus

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Logging in

- To avoid Errors make sure to close the browser completely if you are going to switch databases
- Don't bounce around from the training database to the live database as it may cause errors and you might end up entering your clients into the wrong database.
- If you end up going into the wrong database by mistake you will have to reenter all your clients.

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Tabs

- At the top of each page there are 4 tabs
 - 1- Home,
 - 2- Clients
 - 3- Housing
 - 4- Support
- Each Tab will change the menu groups located on the bottom left side of the page
- Each menu group will change menu options on the left side of the page

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ClientTrack Layout

Tabs

Menu Options

Menu Groups

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Tab 1 Home

- The home tab allows you to
 - Set up your calendar,
 - Manage your user information
 - Look at your recent clients
 - Allow you to run reports and the HUD APR.
 - Continue Paused applications

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Tab 2, Clients

- All client Intake, Enrollment and Exit is handled through this tab its menu groups and options.
- Everything from enrollment to assessments to editing client information is found in the ClientsTab

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Client Dashboard

- The Client Dashboard displays the most important information about the current client
- This means current and previous enrollments and services.
- Basic defining information such as Name, Age and DOB.

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Clients Tab Overview

The screenshot shows the ClientTrack 2011 software interface. The browser title is "Modesto Testing - ClientTrack 2011 - Windows Internet Explorer". The user is logged in as "super user". The interface is divided into several sections:

- Navigation Menu (Left):** Includes Case Management, Add New Client, Client Dashboard, Find Client, Case Notes, Edit Client Info, Family, Assessment, Enrollments, Services, and Calendar.
- Client Information (Top Right):** Displays "John Lennon's Dashboard" and "John Lennon's Information". Fields include Birth Date (10/9/1940), Age (70), Gender (Male), Married? (Married & living w/spouse), Education, Race (White), and Veteran status (No).
- Enrollments Table (Middle Right):**

Case Name	Enrollment	Members	Enroll Date	Exit Date
Lennon, John	TESTER GRANT - TESTSomething	1	07/07/2011	
Lennon, John	HAL01 - SCAP	1	06/21/2011	
Lennon, John	HPRP-Modesto - HPRP	1	06/14/2011	
Lennon, John	HPRP-02-Children's Crisis Cent - HPRP	2	06/14/2011	
- Services Table (Bottom Right):**

Date	Units	\$ Total	Organization
07/13/2011	1.00	\$0.00	HMS HACs
07/07/2011	1.00	\$0.00	HMS HACs
07/07/2011	1.00	\$20.00	HMS HACs
06/14/2011	1.00	\$0.00	HMS HACs

Annotations in the image include "TAB 2" pointing to the top navigation bar, "Case Management Options" pointing to the left menu, and "Clients Tab Menu Groups" pointing to the bottom menu bar.

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Tab 3 Housing

- ⦿ This Tab is currently not being used.
- ⦿ This is a work in progress in order to allow a bed management type model for emergency shelters
- ⦿ This will allow them to easily track entry and exits of ES clients.

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Tab 3 Support

- ⦿ The Support tab allows you to submit questions or issues to the HMIS Technician. If the HMIS technician cannot answer the question or provide a solution he can then submit it to DSI the company that makes client track. This means that no matter what your question is you can get an answer to it

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Workflows

- ⦿ ClientTrack has a workflow system which guides you through the intake and Exit processes.
- ⦿ The workflow is to guarantee that all information that needs to be entered gets entered.
- ⦿ There is a workflow for each program entry and exit.

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Program Workflows

- ⦿ You select your program and your Intake or Exit... Simple
- ⦿ If data collection requirements change in time this keeps things simple because you still only click on the workflow for your program.
- ⦿ At this point many will look the same especially ESG and CDBG and in fact will have the same workflow but it simplifies things for the future.

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Enrollments and Services

- ⦿ Enrollments are so we can tell what program and what grant a client is receiving services for.
- ⦿ If you do not assign a service to a client then they will not show up on the APR.
- ⦿ You also need to exit client from enrollment in order to keep a current list of active clients.
- ⦿ Services must last at least 1 day for it to show up on the APR.

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Assessments

- ⦿ Assessments are a set of questions that represent a client's status at a point in time.
- ⦿ When you intake a client you have to do a master assessment, and other assessments depending on the program.
- ⦿ If you use a workflow you save the trouble of figuring out which assessments to use.

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Exits

- ⦿ An Exit marks that a client has left the program, if you never exit a client it is like he never left and will cause errors when trying to generate an APR
- ⦿ It is important that you exit a client promptly so that you can get consistently accurate reports.

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Adding a client

- ⦿ To add a client you must first be in the Clients Tab.
- ⦿ On the left hand side there is an option called "Add a Client" clicking on this will take you to the client search (explained later)
- ⦿ If a client is not found you can start your client intake gathering only the basic client information
- ⦿ You can then click on any workflow to enroll the client in a program.

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Client Search

- The client search comes up when you are trying to add a client or when you are trying to find a client.
- In order to get the widest range of results when searching you need to put in the least amount of information required.
- Even though it asks for a lot of information only enter First and last name.

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Finding a Client

- If you already have a client in the system there is absolutely no reason why you should enter ALL the data again.
- With ClientTrack, once you enter a client his information stays in the system forever so even if he comes back two years from now his information should still be in the system which would make it easier for you to do the intake.

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Client Search

Modesto Testing - ClientTrack 2011 - Windows Internet Explorer

Welcome super user

Settings Help Sign Out CT2010

Home Clients Housing Support

Case Management

Search Menu

Add New Client

Client Dashboard

Find Client

Case Notes

Edit Client Information

Family

Assessments

Enrollments

Services

Calendar

VA

SHP

HPRP

ESG

Case Management

Lennon, John Birth Date: 10/9/1940 Limited English: No Percent Poverty:

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number and Birth Date** are the best fields to narrow your search.

First Name:

Last Name:

Middle Name:

Full Name (Last, First, Middle):

Social Security Number:

Birth:

Search Client

ONLY Search by First and Last name to produce largest number of results

Search

Cappel

Security and Sharing

- For HPRP sharing please refer to the HPRP Sharing document available from the HMIS Technician
- After you input the client and after each assessment you will be asked what restrictions you wish to apply.
- ALWAYS Restrict to Organization unless HPRP.
- If you do not restrict to Organization Everyone will be able to look at the information you entered.

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Security and Sharing

The screenshot shows the 'Information Release and Security' configuration page for client 'Lennon, John'. The page includes fields for 'Information Release #', 'Begin Date', and 'End Date'. Under 'Security Restriction', three options are listed: 'Restrict to Organization' (selected), 'Share Intake to MOU/Info Release', and 'Share Intake Globally'. A callout box with the text 'Always Restrict to Organization' points to the selected radio button.

Always Restrict to Organization

Assign the client-level Security Restriction.

- **Restrict to Organization** will override any information releases and hides the entire client record from all other organizations.
- **Share Intake to MOU/Info Release** allows only the organizations granted access to the client record thru information releases.
- **Share Intake Globally** allows all organizations to access the client intake and create transactions.

Information Release #:

Begin Date:

End Date:

Security Restriction:

- Restrict to Organization
- Share Intake to MOU/Info Release
- Share Intake Globally

Signature:

[Clear Signature](#)

Any Questions?