User Guide

Table of Contents

TABLE OF CONTENTS **2**

WELCOME TO CLIENTTRACK **5**

SYSTEM REQUIREMENTS **6**

LOGGING IN **8**

BASIC STEPS TO USE CLIENTTRACK **10**

GETTING HELP 10

EASE-OF-USE FEATURES 11

BASIC NAVIGATION 17

NAVIGATION ICONS: 23

WORKING WITH CLIENTS **25**

HOW IS THE CLIENT INTAKE PROCESS ACCOMPLISHED IN CLIENTTRACK? 25

FINDING AN EXISTING CLIENT 26

EDITING A CLIENT 28

FAMILIES **29**

RECORDING A FAMILY 29

FAMILY NAVIGATION 37

FAMILY INFORMATION 38

ACTION FUNCTIONS IN FAMILY 39

ENROLLMENTS **45**

WHAT IS AN ENROLLMENT IN CLIENTTRACK? 45

RECORDING ASSESSMENTS **50**

WHAT ARE ASSESSMENTS AND HOW ARE THEY RECORDED IN CLIENTTRACK? 50

MASTER ASSESSMENTS 50

INFORMATIONAL ASSESSMENTS 54

BARRIERS 58

QUICK BARRIER ENTRIES 61

Self-Sufficiency Matrix 61

SETTING GOALS 65

RECORDING SERVICES 70

Service Eligibility 76

REFERRALS 78

CASE NOTES 85

How are client case notes recorded in ClientTrack? 85

ADDITIONAL CLIENT INFORMATION 87

Address History 87

Interested Others 89

Notifications 91

Wait List 94

Bar List 97

Aliases 100

WORKFLOWS 103

HOUSING MANAGEMENT 106

Checking Bed Availability 108

Reservations in Housing Management 109

Checking in Clients 110

Client Entity Reservations and Check In 114

USING THE CLIENTTRACK CALENDAR 116

User and Client Calendars 116

Recurrences 121

Today Calendar 124

Scheduling a Task Directly From the Calendar 125

Linking ClientTrack to Microsoft Outlook 126

CLIENTTRACK SECURITY 128

How is client information shared and restricted in ClientTrack? 128

DATA SHARING TOOLS 128

INFORMATION RELEASE AGREEMENTS / MOUS 130

RESTRICTION OPTIONS 132

TRANSACTION RESTRICTION OPTIONS 134

CONTACTING CLIENTTRACK 135

CORPORATE HEADQUARTERS 135

Welcome to ClientTrack

Browser-Based & Easy to Use

ClientTrack™ is designed using Microsoft Visual Studio®.NET on the Microsoft.NET Framework to run via Microsoft Internet Explorer 7.0 +, Google Chrome, or Mozilla Firefox. Essentially, ClientTrack is Internet-capable and runs entirely in a browser. Because the developmental concept concerning all screens is ease-of-use, end users are able to use this application intuitively, allowing them to focus the majority of their attention on issues other than the application, especially their clients.

Configurability

The ClientTrack application offers a tremendous amount of functionality and allows organizations to tailor their workflow and menu system to their specific needs.

This online help covers the ClientTrack functionality as originally installed. Please note that as your organization configures your system, it may look different and have different menu names than those contained in this documentation. Therefore, when you are looking for help, search for generic terms. Also, check individual pages for customized help.

Case Manager Tools

ClientTrack supports the case manager in his/her work area as well as the client. We have included a separate area for the case manager to display his/her open tasks, number of client assignments, upcoming events, memorized reports, and more. This area is also configurable, so the case manager can easily configure and control the more important functions.

System Requirements

In order for the program to work properly, please check the system requirements listed below and make any necessary adjustments.

Use a computer with DSL or faster connection to the Internet

For best results, make sure the computer you are using to access ClientTrack has a DSL or faster connection to the Internet.

Use a computer with a modern browser

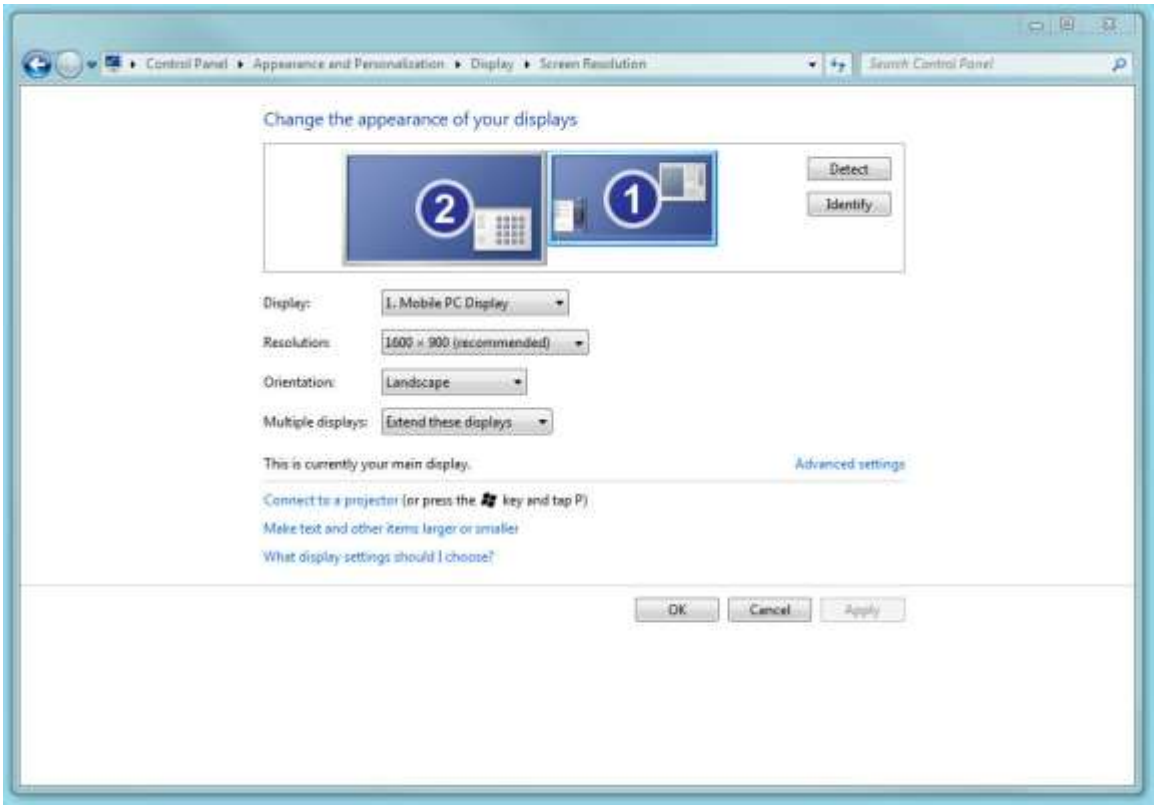
ClientTrack is designed to run on Microsoft Internet Explorer 7+, Google Chrome, and Firefox 9.0+. Operation of ClientTrack depends on the browser, *not* on the operating system installed on the computer. If the system will run one of the browsers above, ClientTrack should operate normally. The program may not operate properly in other browsers, such as Netscape Navigator or Safari.

Set your video display to 1024 x 768 or higher

Certain pages in ClientTrack will not display properly in resolutions less than 1024x768, although higher resolution settings are fine.

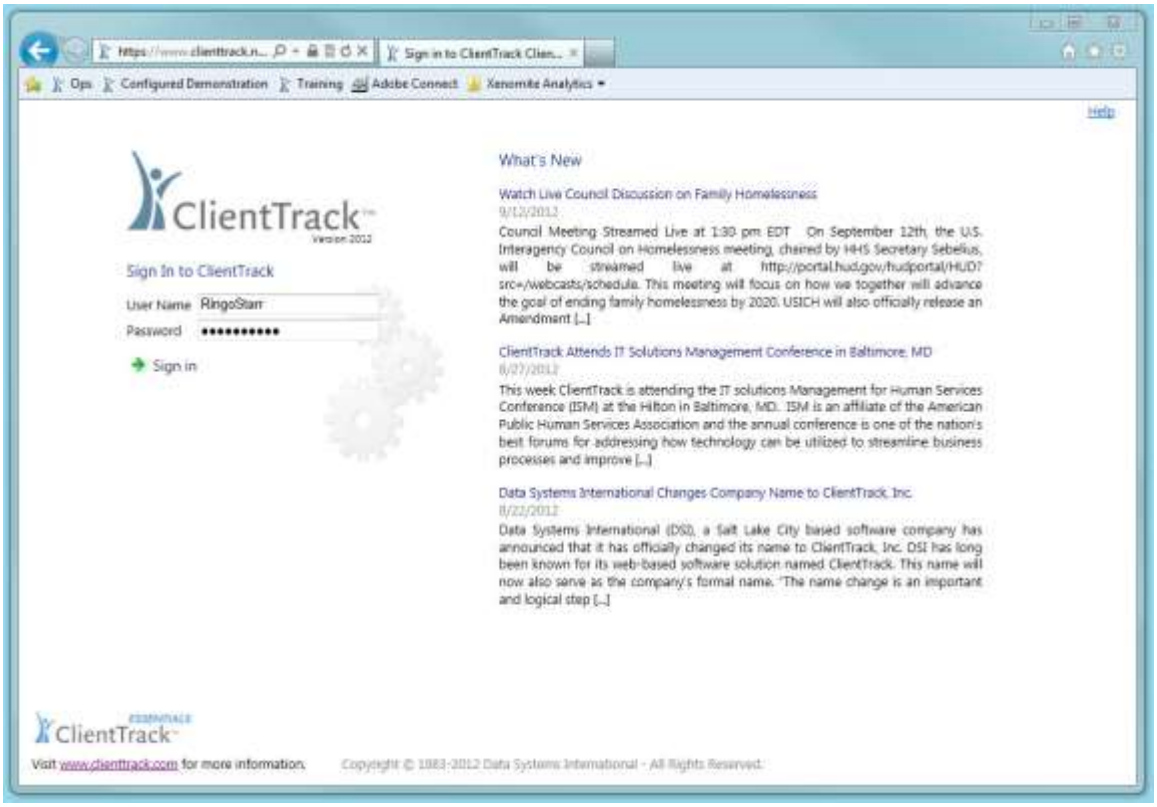
To set your video display (Windows 7)

1. Go to your Control Panel.
2. In the Appearance and Personalization section, click the Adjust screen resolution link.
3. Under Resolution select 1024 x 768 (or higher).
4. Click OK.


Control Panel ▸ Appearance and Personalization ▸ Display ▸ Screen Resolution
Search Control Panel
Change the appearance of your displays
Detect
Identify
Display:
1. Mobile PC Display
Resolution:
1600 × 900 (recommended)
Orientation:
Landscape
Multiple displays:
Extend these displays
This is currently your main display.
Advanced settings
Connect to a projector (or press the key and tap P)
Make text and other items larger or smaller
What display settings should I choose?
OK
Cancel
Apply

Logging in

Log in to ClientTrack by typing the User Name and *case sensitive* Password provided to you. Click Sign In or hit Enter on the computer keyboard.



After logging in, a new window will open in your browser. Be sure to disable any pop-up blockers that would prevent a new window from opening, prior to logging in.

Login Errors

This section lists common problems users may encounter while logging in.

Invalid login or password

If you receive this error when you try to sign in, double-check your login information. Remember that your user name is *not* case sensitive, but the password *is*. Also, check to be sure CAPS LOCK on the computer keyboard is turned off.

No second window appears:

If you typed your User Name and Password, clicked Sign In and nothing happens: First, check the task bar at the bottom of your computer screen to see if another browser window is open and minimized. If there is another window, click it, and you will see the ClientTrack home page.

If there is no second browser window open and minimized on the task bar, most likely a pop-up blocker has prevented the ClientTrack home page from opening. Verify that all pop-up blockers are turned off and sign-in again.

Basic Steps to Use ClientTrack

This help document is designed to teach you how to use ClientTrack to accomplish the following tasks:

- Intake new clients and record client information
- Understand how client information is shared and restricted in ClientTrack
- Record additional client information in ClientTrack
- Work with client Families in ClientTrack
- Create case notes
- Record client assessments
- Record goals and action plans
- Record services provided for clients
- Record referrals
- Use ClientTrack Workflows
- Assess shelter bed availability
- Make reservations for a facility
- Check clients into a facility
- Use the ClientTrack calendar

Getting Help

There are various ways to access Help in ClientTrack:

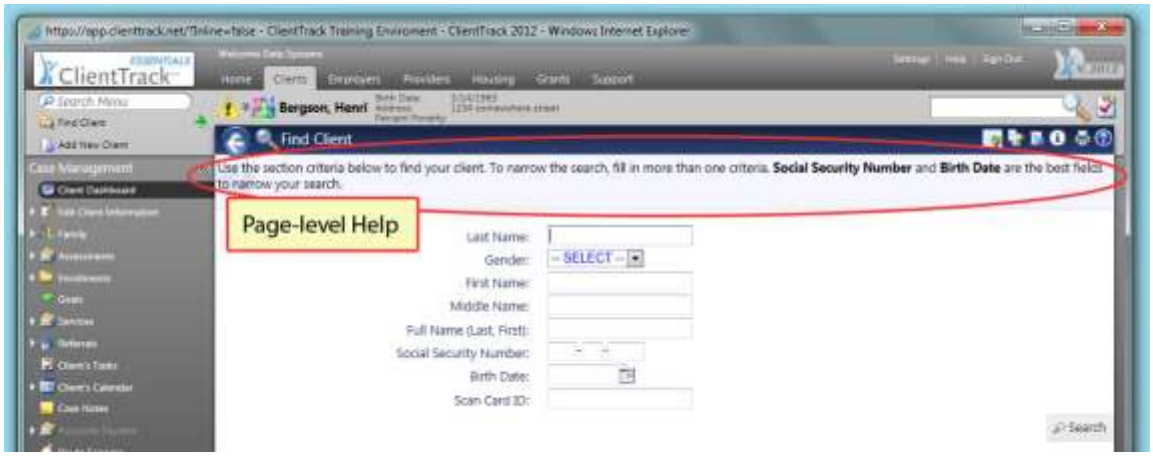
Page-level Help

Most pages in ClientTrack include basic help information displayed automatically as brief written notes designed to facilitate entries on the page.

Screen-Level Process Help

The help icon is available on many screens and pages in ClientTrack. Your organization has the ability to customize many of these notes during administrative setup. Click on the Help icon

to see if there is special help for your screen. If the help icon does not appear on a particular form, then there is not any help text identified for that form.



Help Menu

This document may be accessed and downloaded by clicking Help in the upper right corner of every ClientTrack screen.

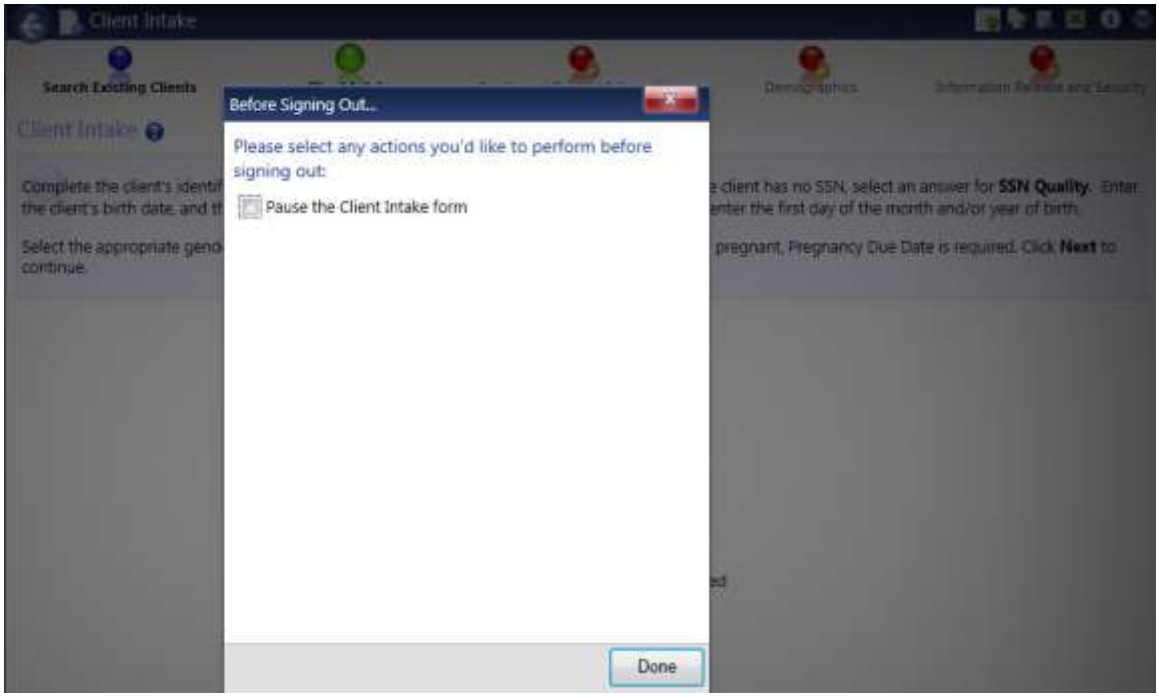
Ease-of-Use Features

Form Steps

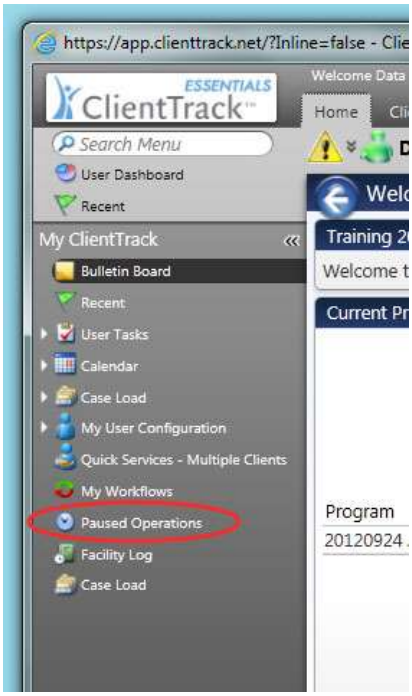
Form steps are designed to facilitate data entry by leading the user through an orderly process displayed as numbered steps at the top of the page.

Paused Operations

Many times you may not finish an entire process, and you may want to put a record on hold, log out of the program, and return to the particular form at a later time. If a user has not completed a process and selects Logout, a new window will open that presents the user with the option to pause the operation.



Selecting yes will save the data entered in the current form and allows the user to continue the process later. Selecting No will end the current process, and the data already entered on the form will not be saved. On many pages in the program, ClientTrack displays a Pause feature, which allows the user to pause the current operation, move to another page, and then return to the original process when desired. Processes that are halted using both Paused Operations methods are displayed in the User Home area under My ClientTrack.

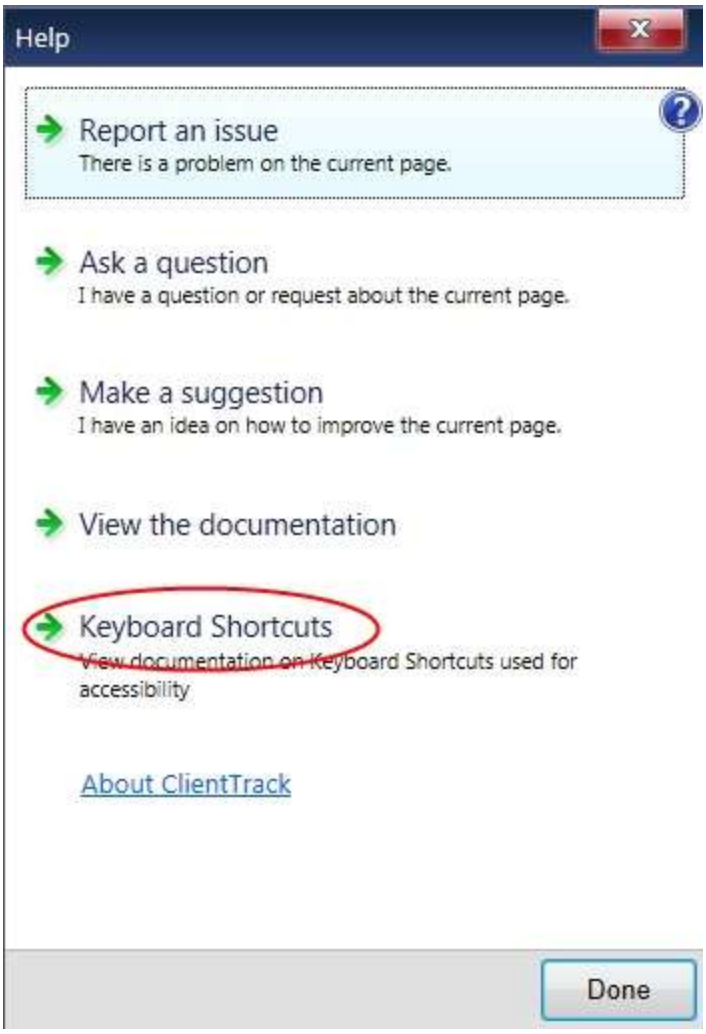


Required Fields

Required fields are referenced on the forms with a red asterisk * that displays at the end of the field label.

Keyboard Shortcuts

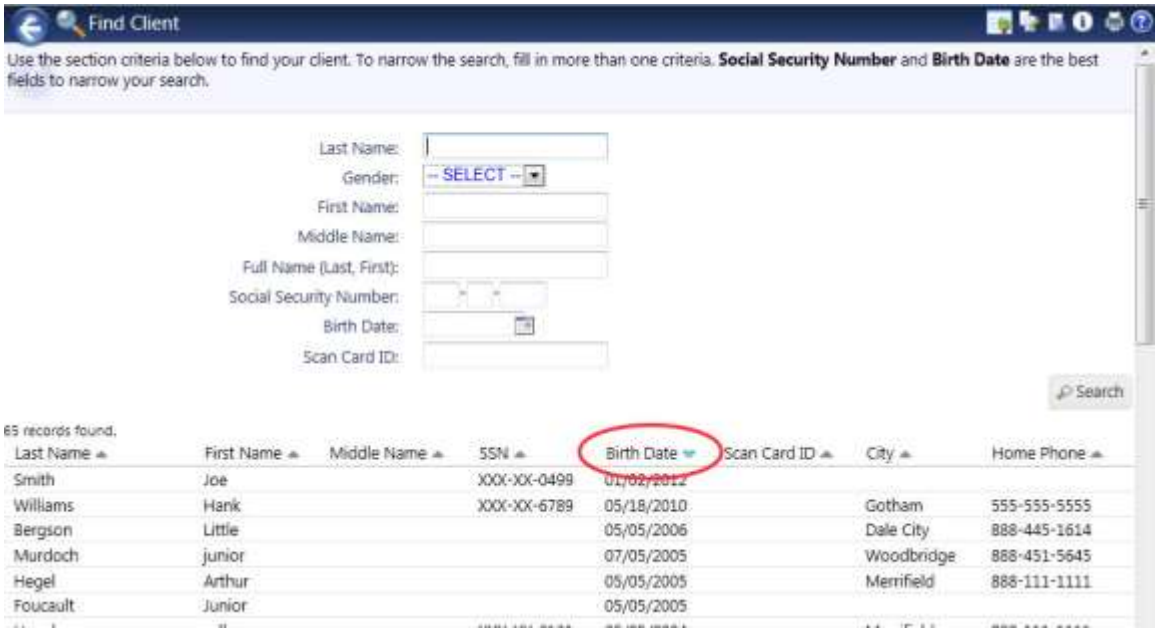
There are many keyboard shortcuts within ClientTrack. For example, when recording information on ClientTrack screens, you can use the Tab key on the computer keyboard to move from field to field. For a full list of keyboard shortcuts, click the help link in the top right corner, and then select Keyboard Shortcuts.



Sorting

In categories such as Find Client (see below), where results are displayed in column form, ClientTrack has a sorting feature. To sort results, click on the category heading or the grey arrow ▲. A blue arrow ▲ will appear next to the heading, telling you that the section is displayed in either alphabetical or numerical order. If you click on the same heading again, the arrow will switch directions ▼, indicating that the category is now displayed in reverse alphabetical or numerical order.

For example, clicking on Birth Date will sort the results with the earliest date listed first. Clicking on Birth Date again sorts the list with the latest date listed first.



Clicking and holding a column header will show a sort menu. Mouse over the sort option you want, and then release your mouse button to activate that sort option.

Data Validation

When a field is required and has not been properly completed, a message will display in red at the top of the screen indicating that more information is required. The application will also draw a red box around the field(s) that may have a problem.

Tip: Clicking an error message will place your cursor on the field that generated that message.

Client Intake

Search Existing Clients | Client Intake | Family and Contact Information | Demographics | Information Release and Security

Please address the following:

Gender is a required field

Client Intake

Complete the client's identifying information. Enter a full or partial Social Security Number. If the client has no SSN, select an answer for **SSN Quality**. Enter the client's birth date, and the client's current age will display. If an exact birth date is unknown, enter the first day of the month and/or year of birth.

Select the appropriate gender. If the client is female, pregnancy status is required. If the client is pregnant, Pregnancy Due Date is required. Click **Next** to continue.

Last Name: Locksley

First Name:* Robin

Middle Name:

Social Security Number: - -

SSN Quality:* Don't Know or Don't Have / Refused

Birth Date:

Client Age: N/A

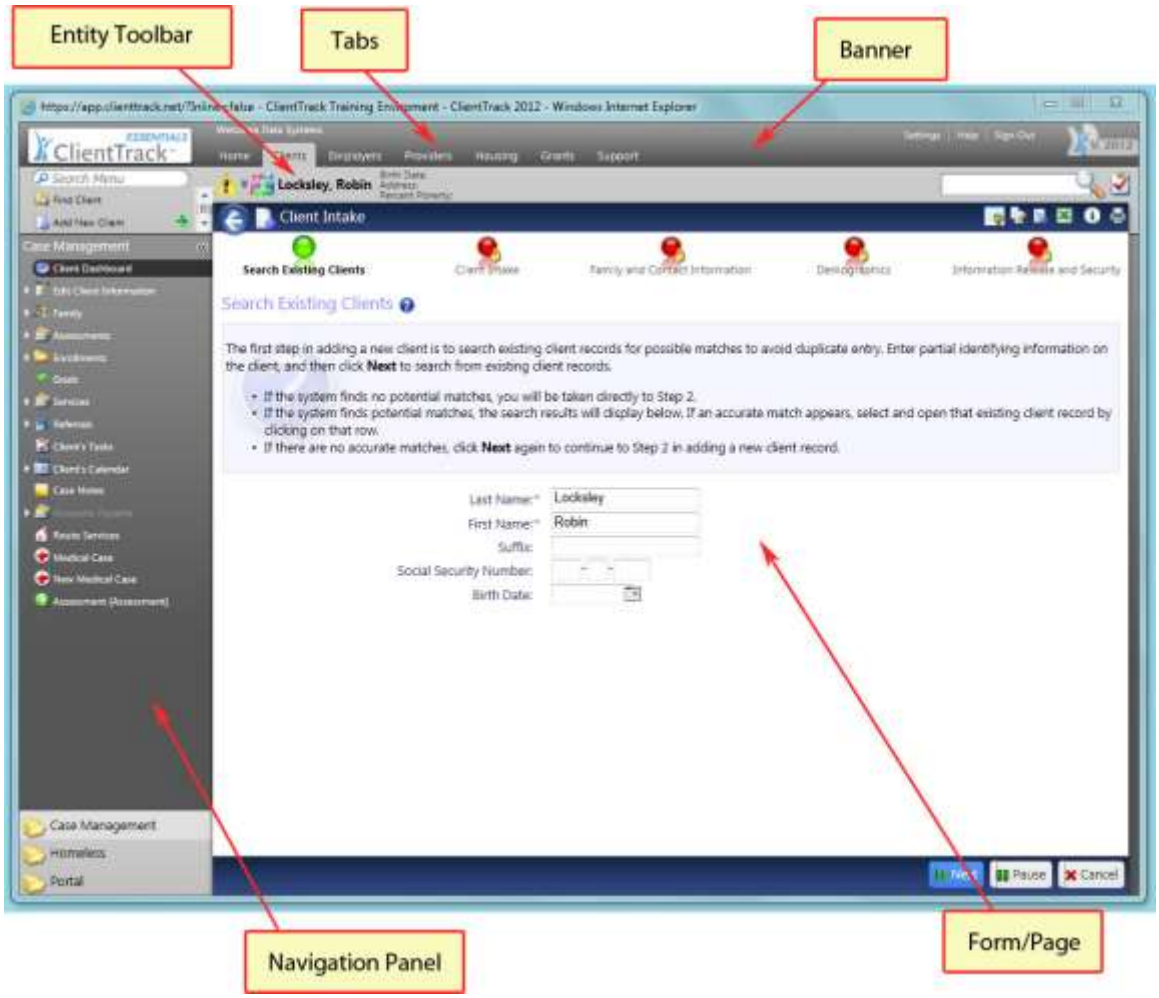
Birth Date Quality:* Full DOB Reported / Approximate or Partial DOB Reported / Don't Know / Refused

Gender:* -- SELECT --

Marital Status: -- SELECT --

Basic Navigation

ClientTrack consists of the following main areas:



Tabs

Several Tabs appear across the top of your screen. Each Tab indicates a specific area of the application in which you are able to work in.

- **Home Tab** – This tab is your "home base" as a user. Here, you can view information specific to you as a user like your caseload or update user information like your password.
- **Client Tab –** This tab provides you with access to information specific to a selected client. This is where most users spend the majority of their time in ClientTrack.
- **Employer Tab –** This tab provides you with access to information specific to a selected employer.

- **Provider Tab –** This tab provides you with access to information specific to a selected provider. Here, users can identify which services a provider provides and review a history of their referrals.
- **Housing Tab –** This tab provides you with access to manage information about a specific housing facility. Here, users can identify whether there are rooms available or check clients in.

Entity Toolbar

The Entity Toolbar identifies which entity you are currently working with. For instance, on the client tab the entity toolbar will display the client you have selected; on the Provider tab the entity toolbar will display the provider name that you have selected.

Note: If no entity has been selected, the Entity Toolbar will appear to be empty and some menu options may not be visible. Use the find functionality on each tab to select an entity.

Navigation Panel

The Navigation Panel is on the left. In the Navigation Panel, you will navigate to the different areas to perform your daily case management tasks, such as client intakes, assessments, services, and referrals.

Page/Form Area

The data entry form or page is on the right. This is where users create, edit, and review content.

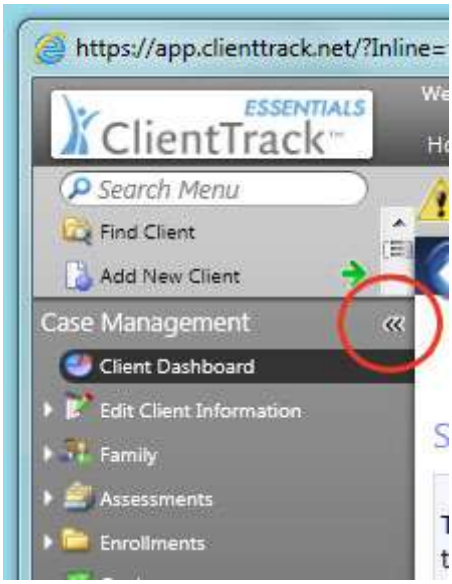
Banner

The Banner area of the application allows users to perform simple actions such as getting help or logging out. Users can also click on “My Configuration” to change their color theme or change workgroups and/or organizations (only available to certain users).

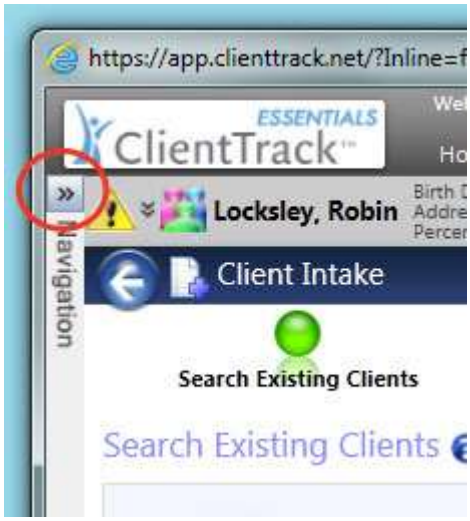
Navigation

Expanding/Collapsing the Navigation Panel

A small arrow icon in the left Navigation Panel can be used to expand or contract the panel.

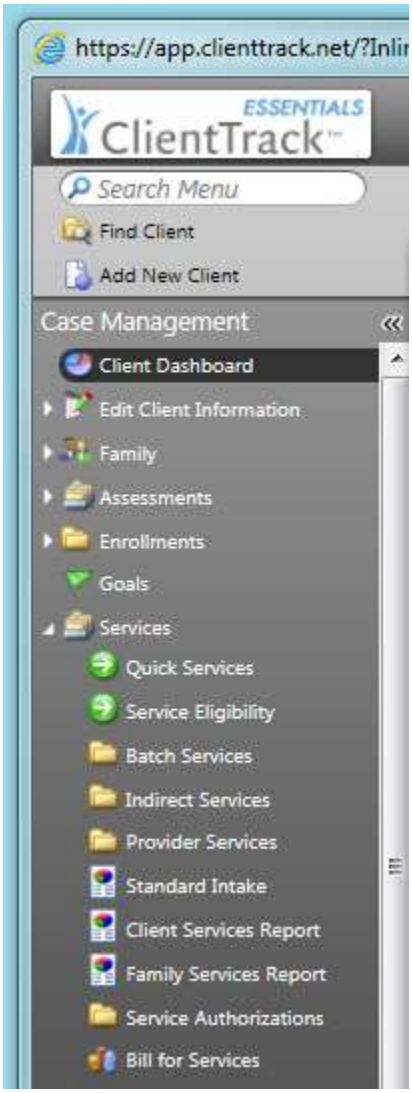


Clicking on the icon will collapse the left Navigation Panel. To restore the panel, click on the icon again.



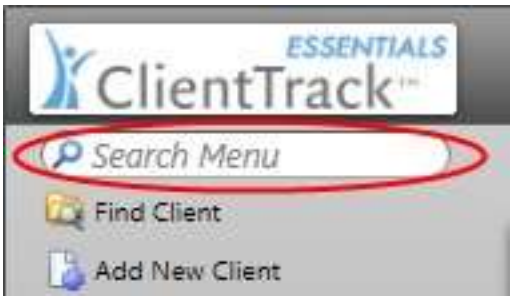
Expanding / Collapsing Navigation Folders

Clicking on the arrow adjacent to a menu category displays the available submenus. The downward arrow next to a category indicates that the folder is open. Click on the downward arrow to close the folder.

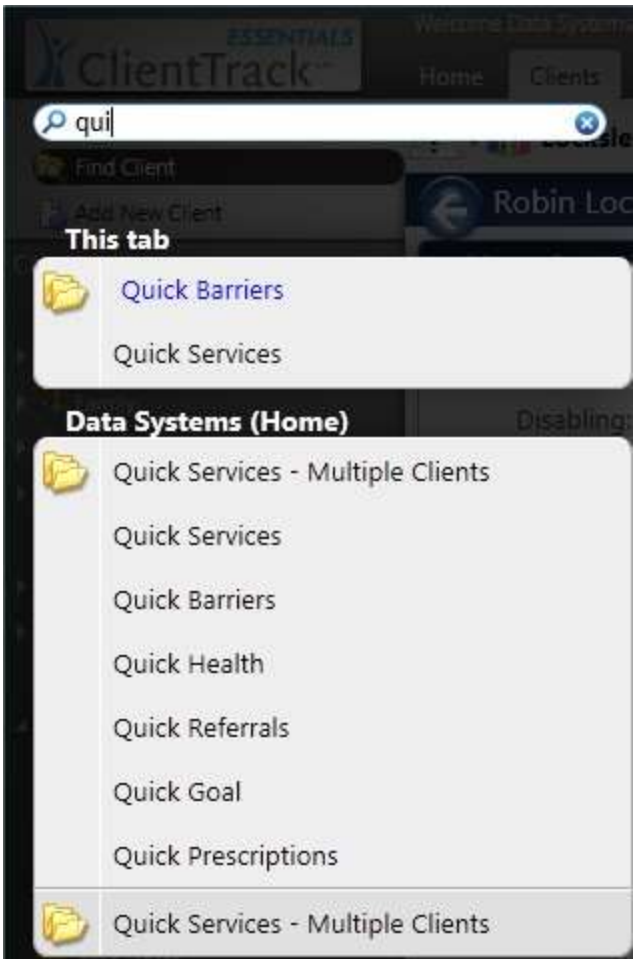


Searching the Navigation Panel

ClientTrack includes the ability to search the navigation panel for any menu option. Click the search menu button and begin typing the name of the menu option you are looking for.

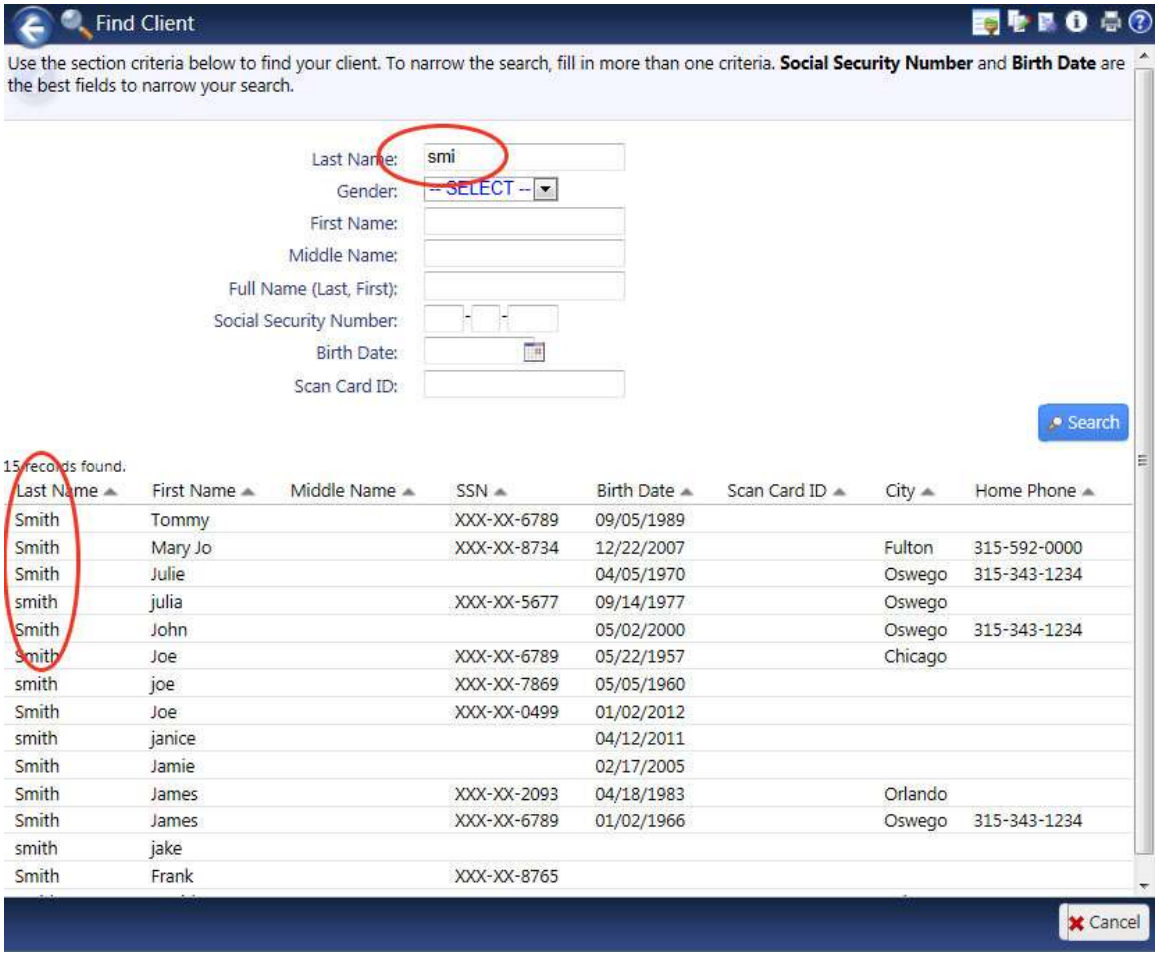


As you type, ClientTrack will show a list of menu options that match what you have entered.



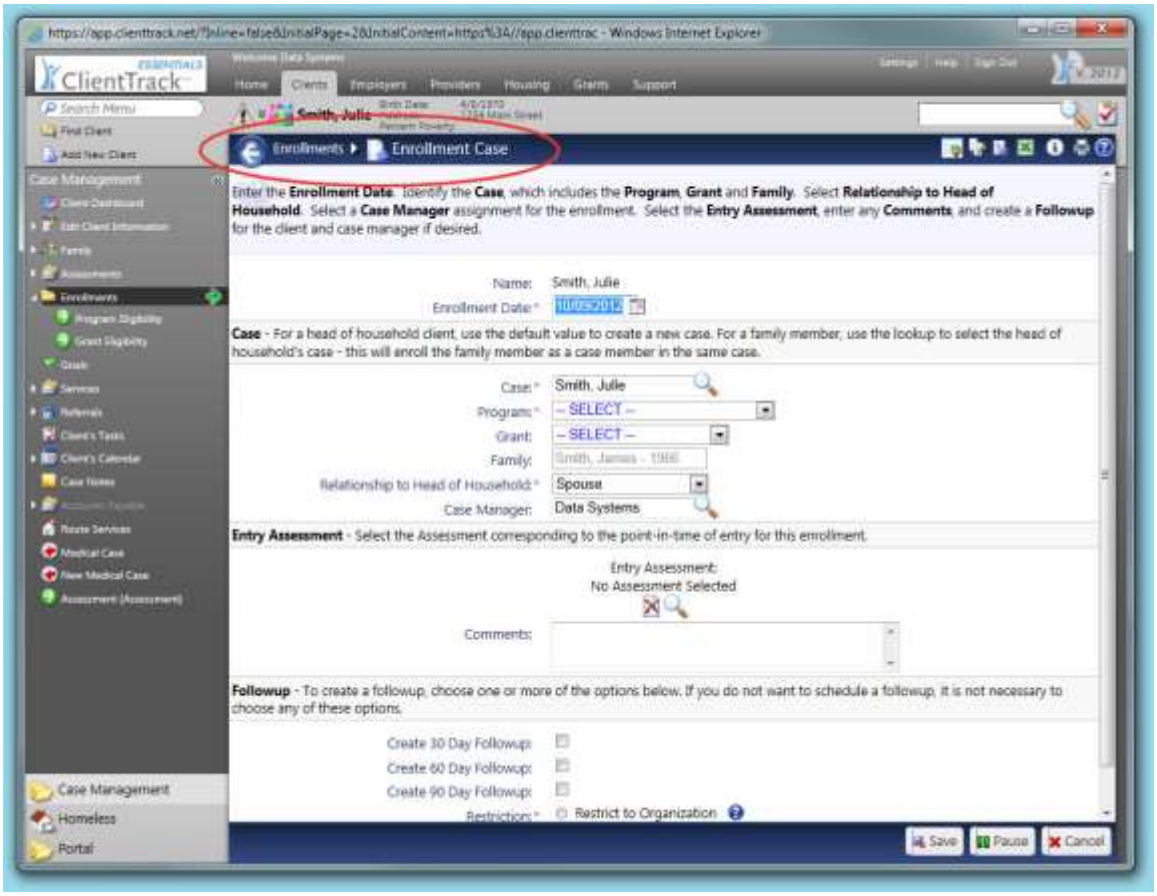
Search

ClientTrack makes searching easy. Anywhere in ClientTrack when a search button is displayed, type in any identifying information, such as part of the Last Name, and click Search. For example, you can type in just part of a client's last name to get a list of clients that match that last name. Or, you can simply click Search and all clients will be displayed.



Click Trails

Click trails serve a dual purpose. They indicate the user's location in ClientTrack, and by clicking on the displayed arrow, the program will return the user to the page listed in the title.



Navigation Icons:

Action Menu Displays a list of available actions	
Delete Delete a record	
Edit Edit a record	
Find Search records	
Print	

Print the page contents	
Date Displays a clickable calendar to facilitate date entries	
Family Navigation among family members' information. (See page 59.)	
Alerts The alerts icon displays when an alert has been posted concerning a client or other entity. The priority of the alert is displayed by color. Red = High Yellow = Medium Green = Low	

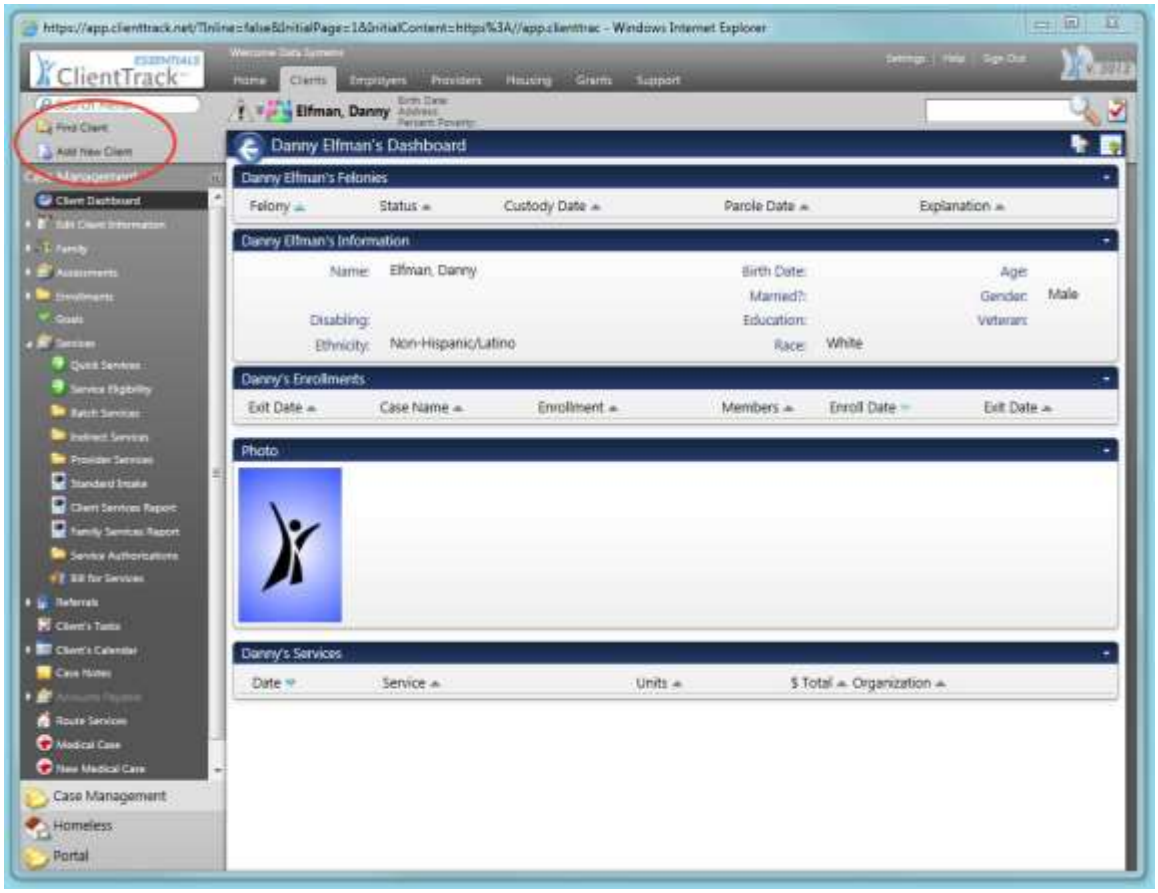
Working with Clients

How is the client intake process accomplished in ClientTrack?

During the intake process, new clients are first added to the ClientTrack database. The initial step involves searching the database to see if the client is already in the system. Then, you will enter basic client demographic data, which will help you accomplish specific assessments and provide the client with essential services.

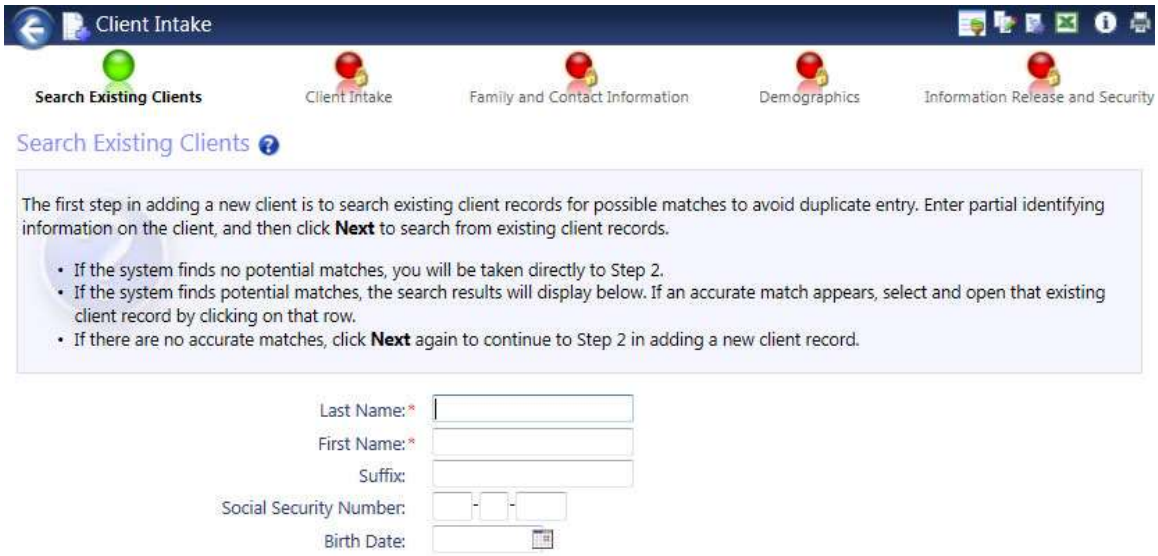
To begin the client intake process:

Click the Clients tab at the top of the page. In the left navigation panel click the Case Management menu. In the Case Management area you will see several of the client intake processes including the Add New Client and Find Client links as well as the Case Management menu group.



To add a new client to ClientTrack:

1. From the Left panel in the Case Management area, click Add New Client.
2. ClientTrack will take you through a series of Add Client Steps.
3. The first step usually asks for Client Name, SSN, and Birth Date. ClientTrack automatically checks for duplicate clients when you click next on this step.



4. If your client has a family, be sure to set up the family so you can attach the other family members to it. (In ClientTrack, you add each family member as a new client, and then tie their record to the family account created for the first family member.) With the first family member you add as a client, click Look-up next to the Family Account box, and then click Add New Family.
5. Click Finish.

Finding an Existing Client

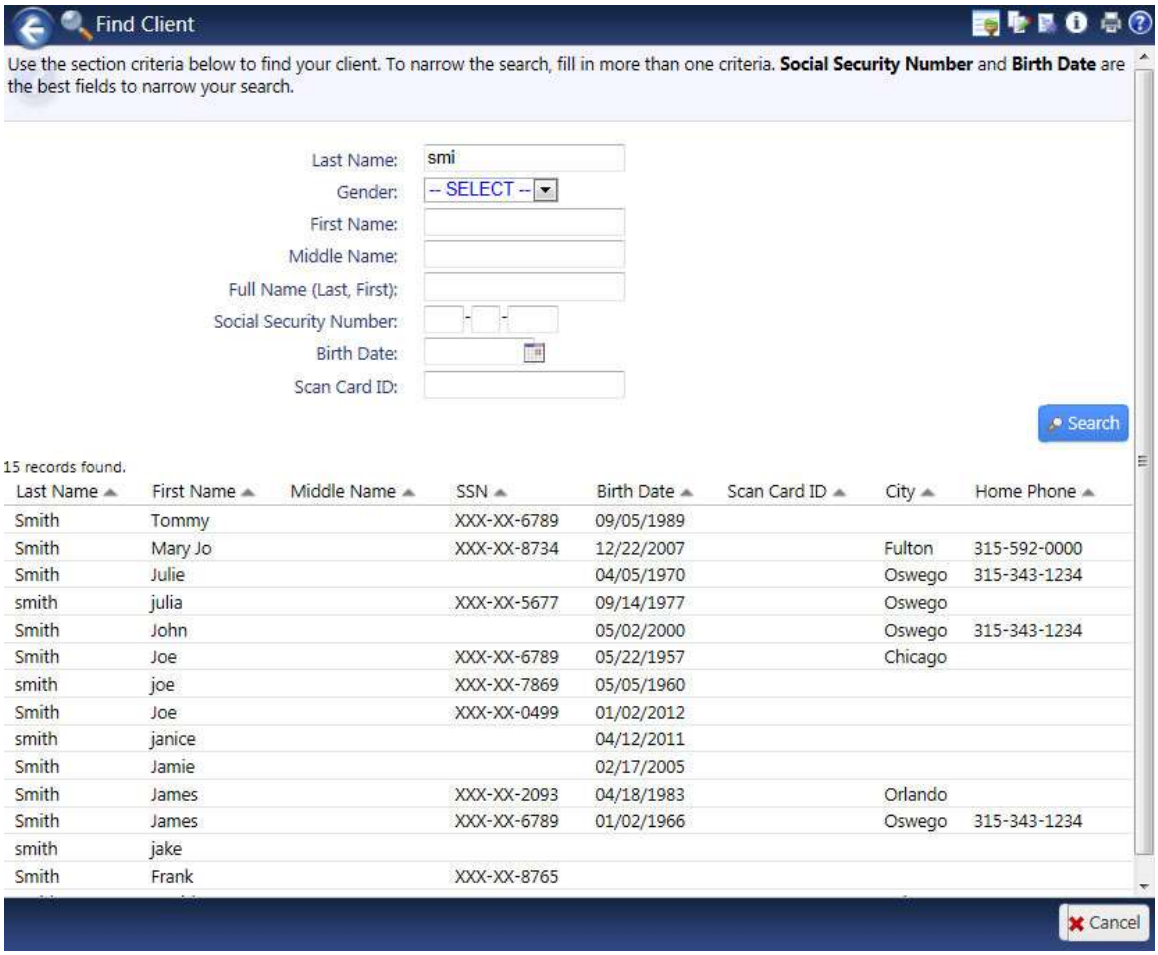
After you have added a client to the database, you can find that client's file easily from the Case Management Left Navigation Panel.

To find an existing client:

1. At the top of the Case Management area in the left panel, click Find Client.
2. Type in any identifying information, such as Last Name, and click Search. If you leave the form blank and then click Search, a list of all clients will be displayed.

3. If the client appears in the search results, click on the clients' name.

Tip: You can search on any of the fields listed. The more fields you fill out, the more specific your search will be.

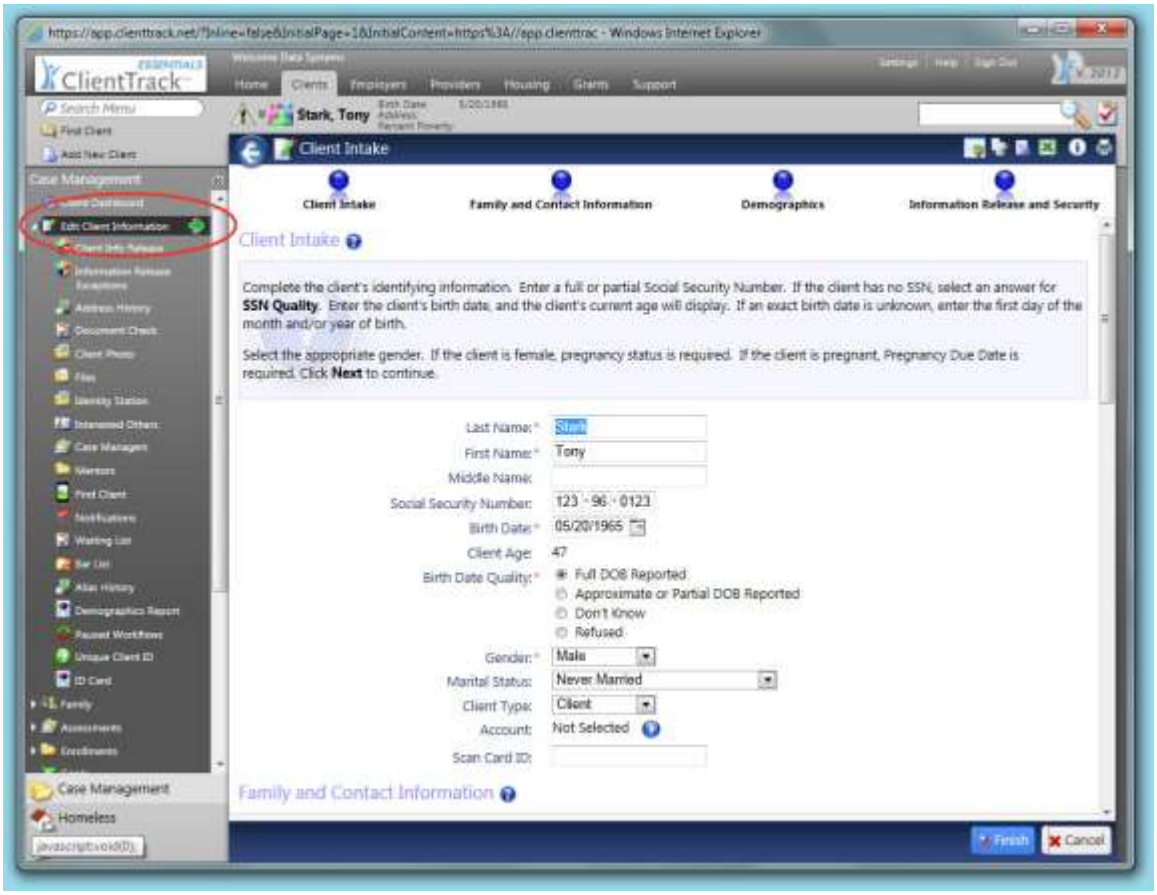


ClientTrack also offers a client quick search option at the top of the right navigation panel. To use quick search, type the client's last name and click the Find icon. The Find Client page will then be displayed.

Editing a Client

To edit a client:

1. On the Clients tab, in the Case Management menu, click Edit Client.
2. You can then edit by changing the fields or adding information to blank fields.



Note: This edit page will vary depending on the edit rights you have for each client.

Families

How is a family handled in ClientTrack?

Clients related to other clients are normally entered in the ClientTrack database as families. ClientTrack uses the term “family” to refer to a household. A client may be a member of multiple households, but always has a “primary household” identified.

Family information in ClientTrack

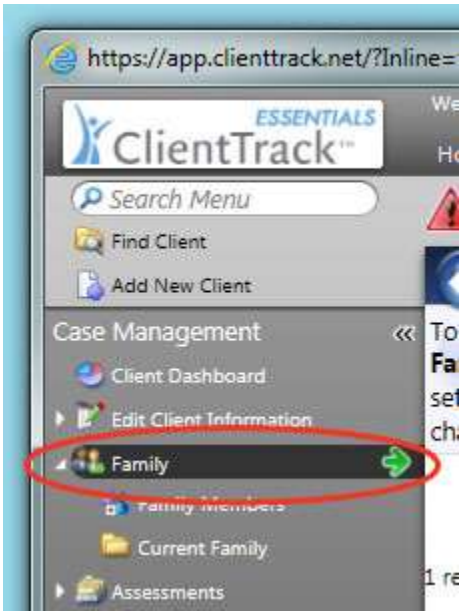
There are two primary ways to access family information in ClientTrack. On the top tab area, click the Client tab. In the left navigation panel click the Case Management menu. Click Edit Client, and then click Family. Or, click the Family icon  in the entity toolbar, then click Quick Add Family Member. Both of these methods will be described below.

Recording a Family

The family can be recorded several different ways.

To add an existing client to a new family:

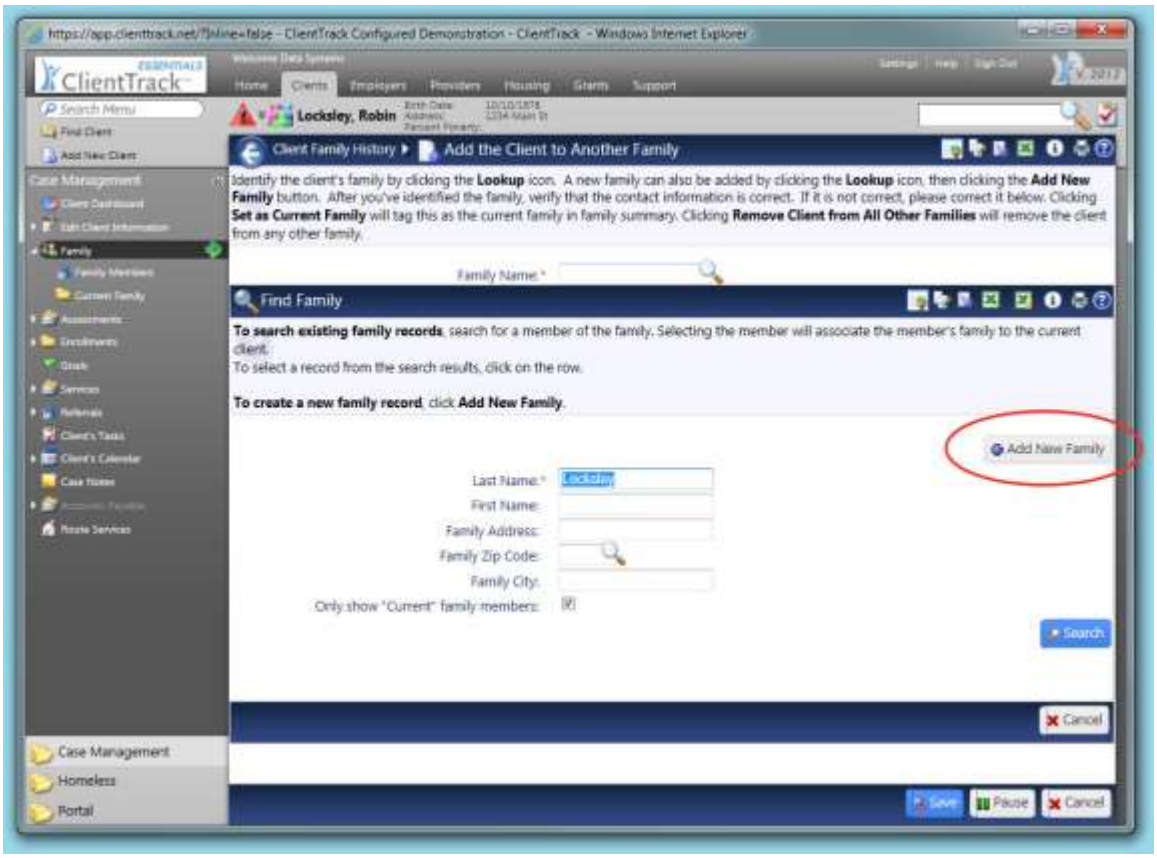
1. In the Case Management menu, click Edit Client then click Family.



2. On the Client Family History page, click Add New Family.

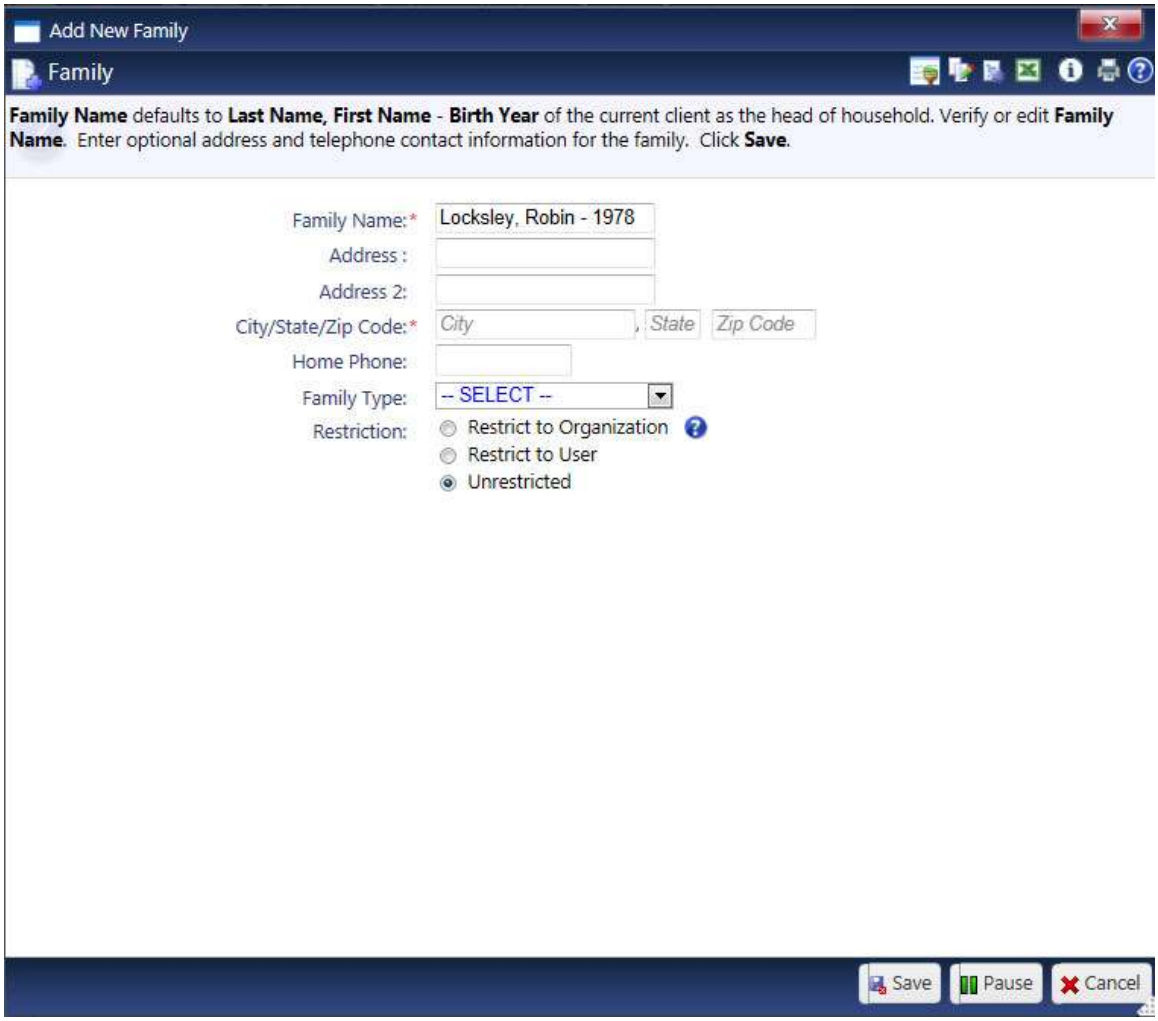
3. On the Add the Client to Another Family page, click the Find Icon.

4. The Find Family page will open. Click the Add New Family button to add a new family to the system.



5. Enter the family information on the Family page.

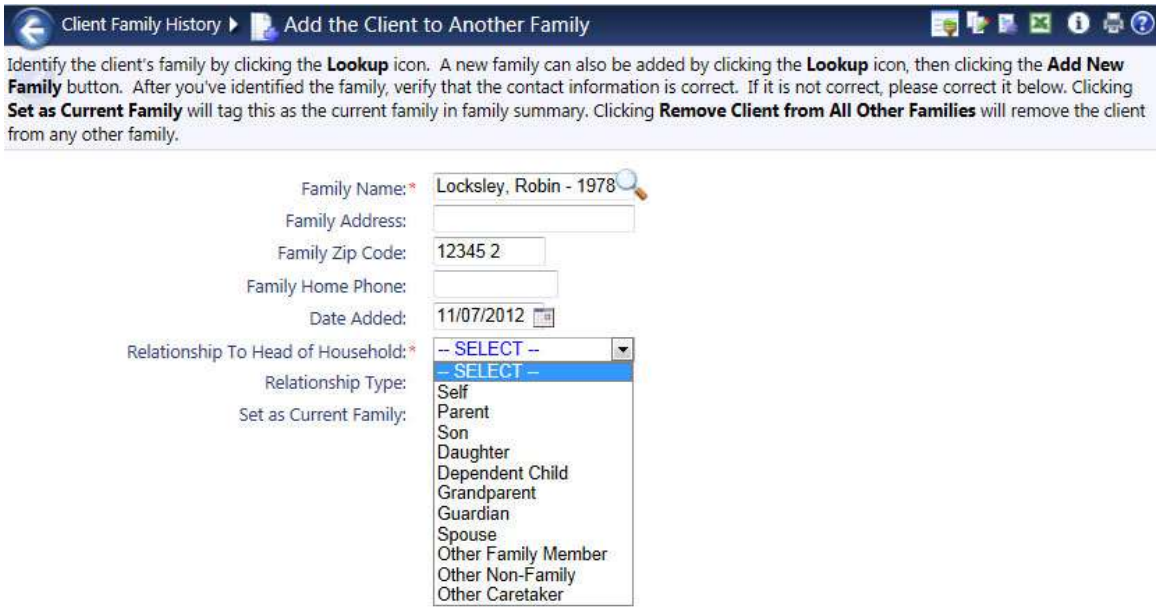
6. Click Save.



7. The new family name will then appear in the Family Account.

8. To add the client to this family, select his/her Relationship to Head of Household from the dropdown menu.

9. Enter any other desired information, then click Save.



To add a new family to a new client:

1. From the left panel of the Case Management menu, click Add New Client.
2. Click the Find icon next to the Family Account box wherever it appears on your add new page(s).

3. In the Find Family pop-up window, click Add New Family.

4. ClientTrack will default a Family Name as Last Name, First Name- Birth Year. Record other contact information in the Family window and click Save.

5. Complete the additional Client Information wizard steps.

To add a new client to an existing family:

1. In the left panel of the Case Management menu, click Add New Client.

2. Click the Find icon next to the Family Account box wherever it appears on your add new page(s).

3. Type any information into the fields and click Search.

4. Click on the appropriate family name and the program will return to the Family and Contact Information page and the appropriate family information will be automatically inserted into the Family Contact Information area.

5. Click Next and complete the additional Client Information Wizard steps.

Alternative method to add a new client to an existing family:

1. Click the Family Icon  in the top right corner of the right navigation panel.

2. Click Add Family Member.

3. Since the process of adding a new family member involves adding a new client to the ClientTrack database, the Client Intake page will be displayed. ClientTrack enters the Last Name of the new client automatically. If the last name of the family member is different, type the correct last name.

4. Since the new client will be linked to the current family, ClientTrack enters the Family name in the Family and Contact Information area. The Family name should not be changed.

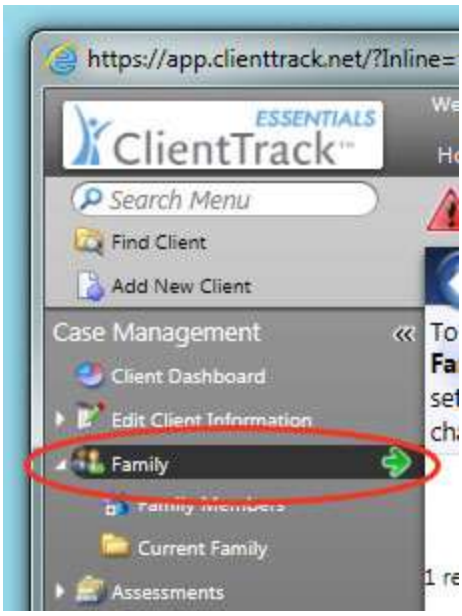
5. Clicking the Copy Address button will copy family contact information to the client's individual contact information.

6. When finished entering client information, click Save.

To add an existing client to an existing family:

Under the Case Management menu, click Find Client and locate the client that will be added to the family.

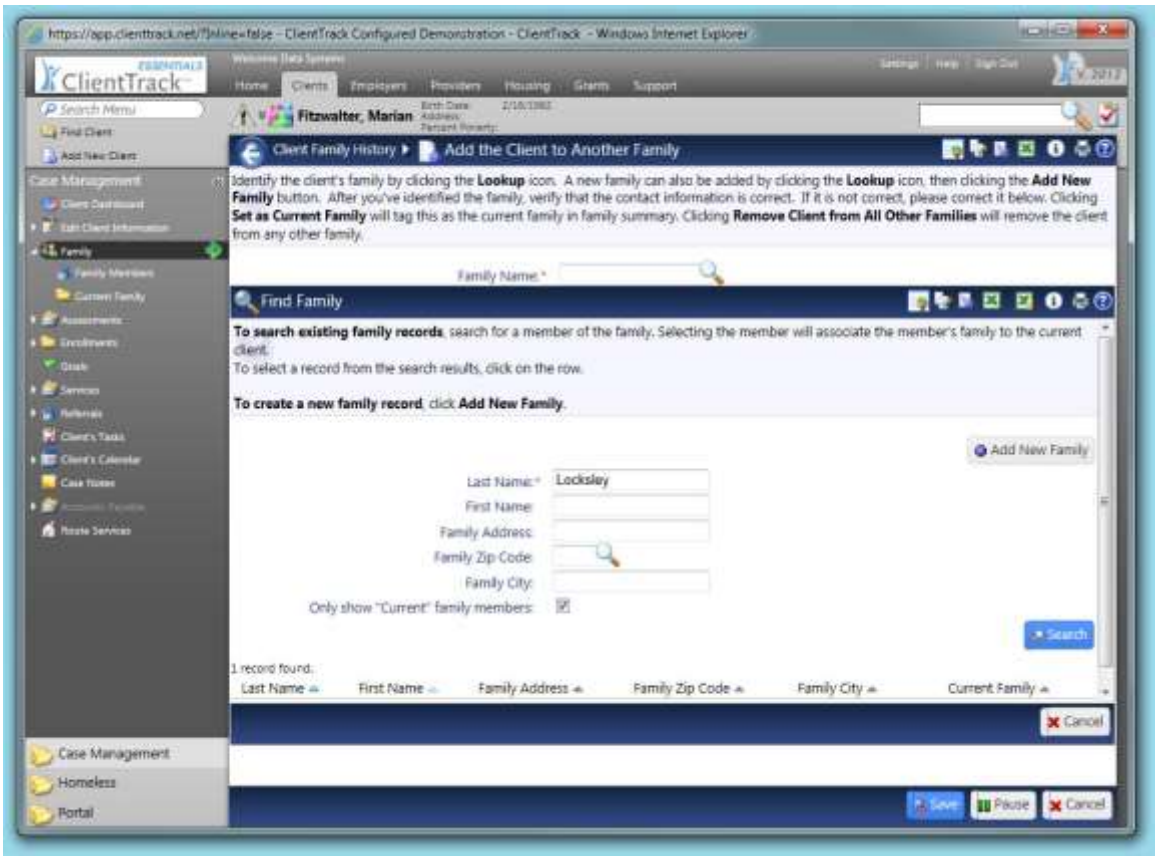
1. In the Case Management menu, click Edit Client and then Family.



2. On the Client Family History screen, click Add New Family.

3. On the Add the Client to Another Family page, click the Find Icon next to the Family Account field.

4. In the Find Family pop-up window, type some search criteria in the Family Name, Zip Code and/or City fields and click Search.
5. A list of families will display below the fields on the form. Click the appropriate family.



6. The pop-up window will close, and the family information will display in the Add the Client to Another Family page.
7. Click Save.

Family Navigation

If the client has been entered as a member of a ClientTrack family, the Family Icon  appears to the left of the entity (the current client's) name.

Clicking on the Family Icon allows users to:

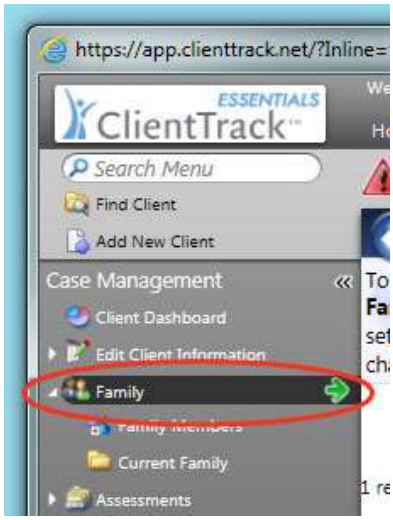
- View the names of the other family members (blue icons display for males  and pink icons display for females )
- Access family member's information
- Add a new client to the family
- Navigate among family members
- View Case Notes for each family member

Family Information

Various details of a client's family history recorded in the ClientTrack data base are available through the Client Family History page. This information is often used to determine eligibility for certain grants or funding sources based on information like family size, monthly income, and number of children.

To access the Client Family History page:

Under the Clients tab in the Case Management menu, click Edit Client, then click Family.



Tip: The family name is displayed in red to let you know which family is the current family for the selected client.

Action Functions in Family

Clicking the Action Gear next to the family name will display a number of options.

View Family Members

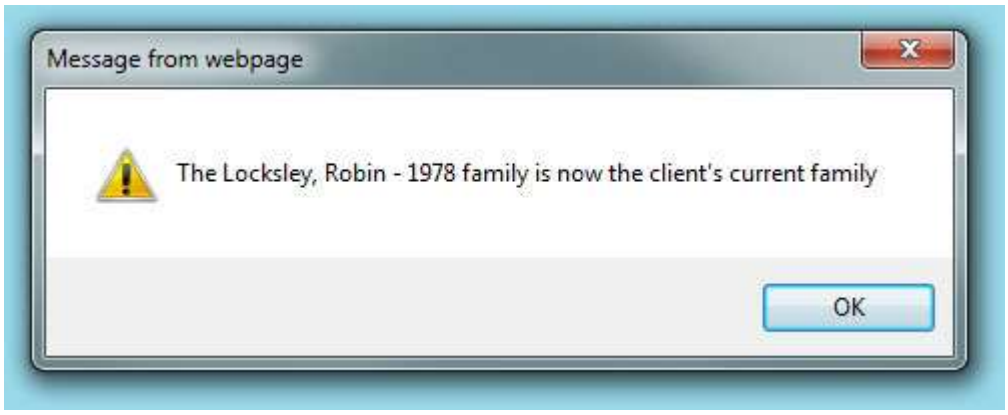
This option opens the Family Members page, which displays the members of the client's current family. The family members' information can be edited or deleted by using the Edit and Delete icons next to each family member's name.

Edit Family

The Edit Family option displays the Family page where you can edit basic family information.

Set as Current Family

Because a client may be linked to more than one family in ClientTrack, the Set as Current option allows you to set the current family for the client. When you click on Set as Current, a small window will open to verify the current family is set as the client's family.

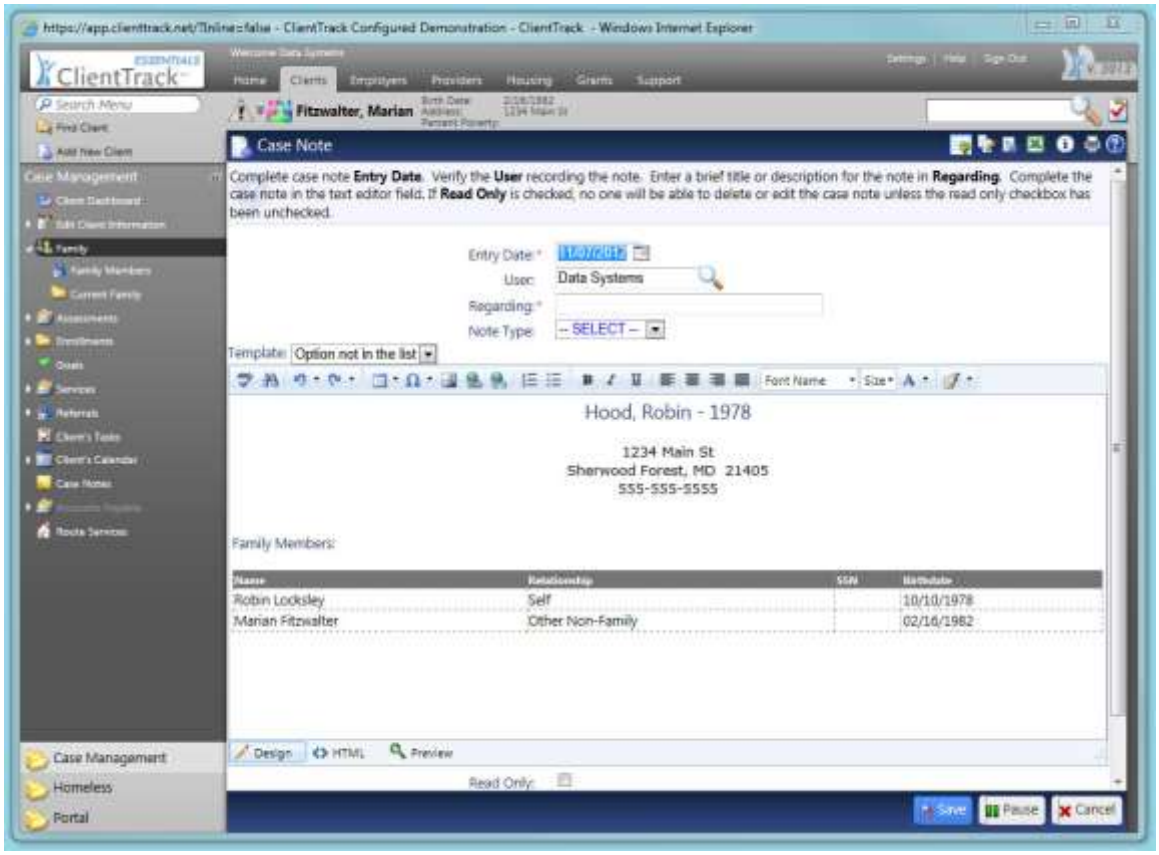


Family Alias

The Family Aliases option displays a history of family name changes that occur over time. If a family name was changed from "Allen" to "Allen, Jill - Family," then the alias option would display both names as illustrated below. Family aliases may be deleted by clicking the Delete icon.

Case Notes

The case notes option allows the user to record a case note on behalf of the family and attach the case note to the family name. Many times the case manager will interview an entire family and have specific notes for each family member but also have notes that relate to the entire family. Selecting Family Information in the Template dropdown list adds basic information for all family members to the case note text area.



Family Services Report

The Family Services Report option displays the Family Services Report page which allows you to generate a summary of services used during a selected time frame. This can be specific to a family, a grant or both.

1. In the Family Services Report page, to display an existing report that has already been entered into the ClientTrack database, select the desired report from the Saved Report dropdown menu.

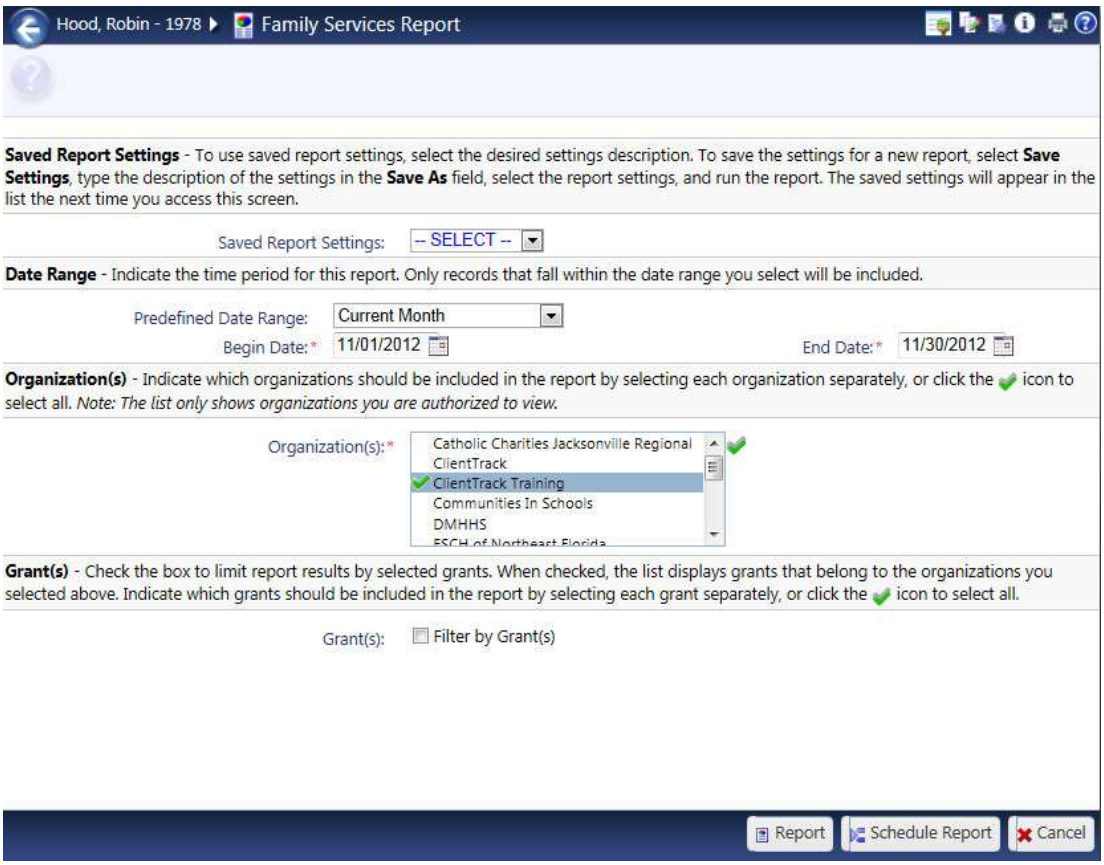
2. To save a new report, click Save Parameters in the dropdown menu.

3. After the Save As field opens, type a name for the new report.

4. Enter a date range for the services to be displayed on the report.

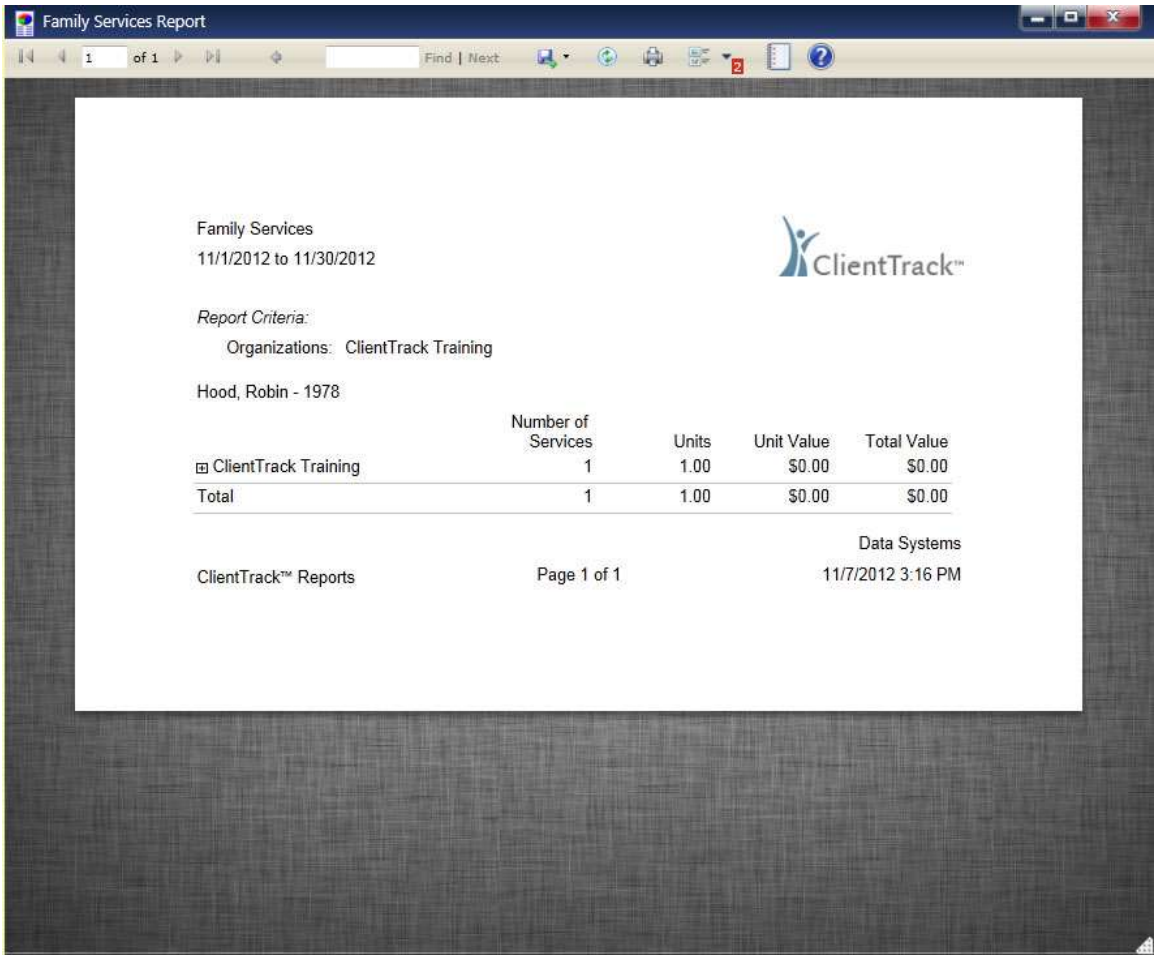
5. The Organization and Grant options allow the user to select particular agencies, organizations, and grants included in the report. To run the report for all available agencies, organizations, and grants, leave the field blank or click Select All under Organization and/or Grant.

6. To run the report, click Report.

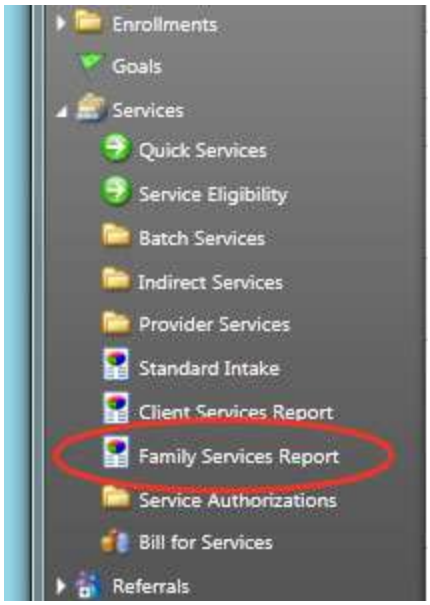


Tip: ClientTrack utilizes standard Windows keyboard functions. For example, multiple organizations or grants can be selected by holding down the Alt key and clicking on the desired items.

The report opens in a new window as illustrated below. If the report is longer than a single page, the navigation tools at the top of the page help the user move around in the document. In addition, the results may be displayed in a spread sheet or PDF file by clicking the appropriate buttons.



The Family Services Report can also be accessed in the Case Management menu under the Client tab by clicking Services and then Family Services Report.



Note: The Client Services Report option, located just above the Family Services Report, provides the same information for an individual client rather than a family.

Enrollments

What is an enrollment in ClientTrack?

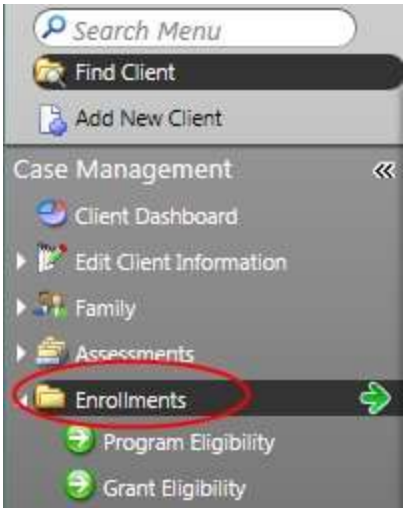
The basic components of enrollment include program name, begin date and end date. An enrollment can be associated with assessments for reporting purposes. It is important to remember that the function performed by an enrollment may come under a number of different names, so it is important to think in terms of function.

Note: Many items (such as assessments) need to be associated with an enrollment in order for reporting to work properly.

An enrollment is often used to mark out a range of time used to measure outcomes. For example, when a client begins working with an agency it is common for that agency to collect data about their income. When the agency has stopped working with the client they may measure income again. In terms of the enrollment the first income assessment occurred when entering the program and the latter when exiting the program. The difference between these two points demonstrates quantifiable changes that can help identify whether working with the client had a substantial effect on their situation.

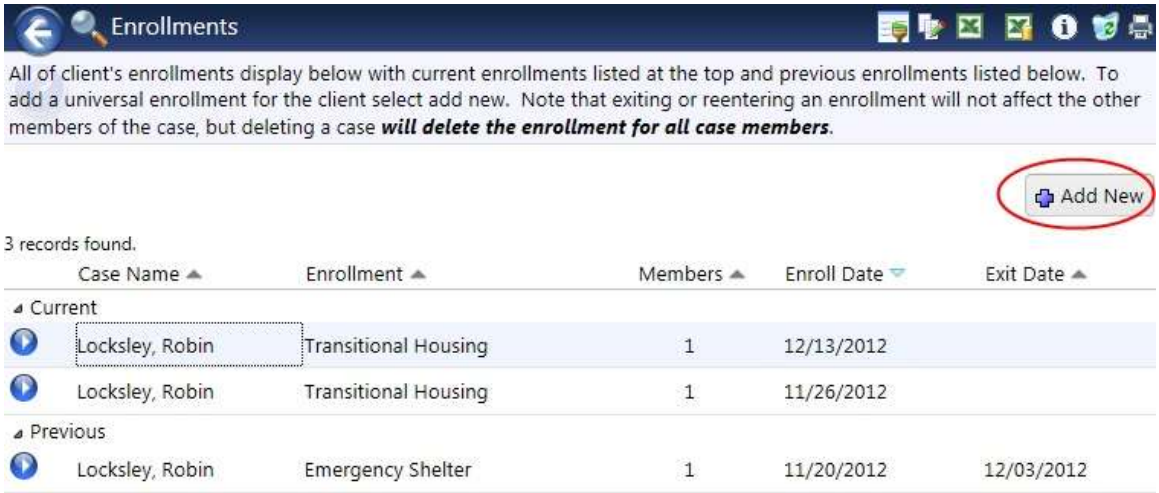
To access enrollments in ClientTrack:

On the Clients tab in the Case Management menu, click Enrollments.

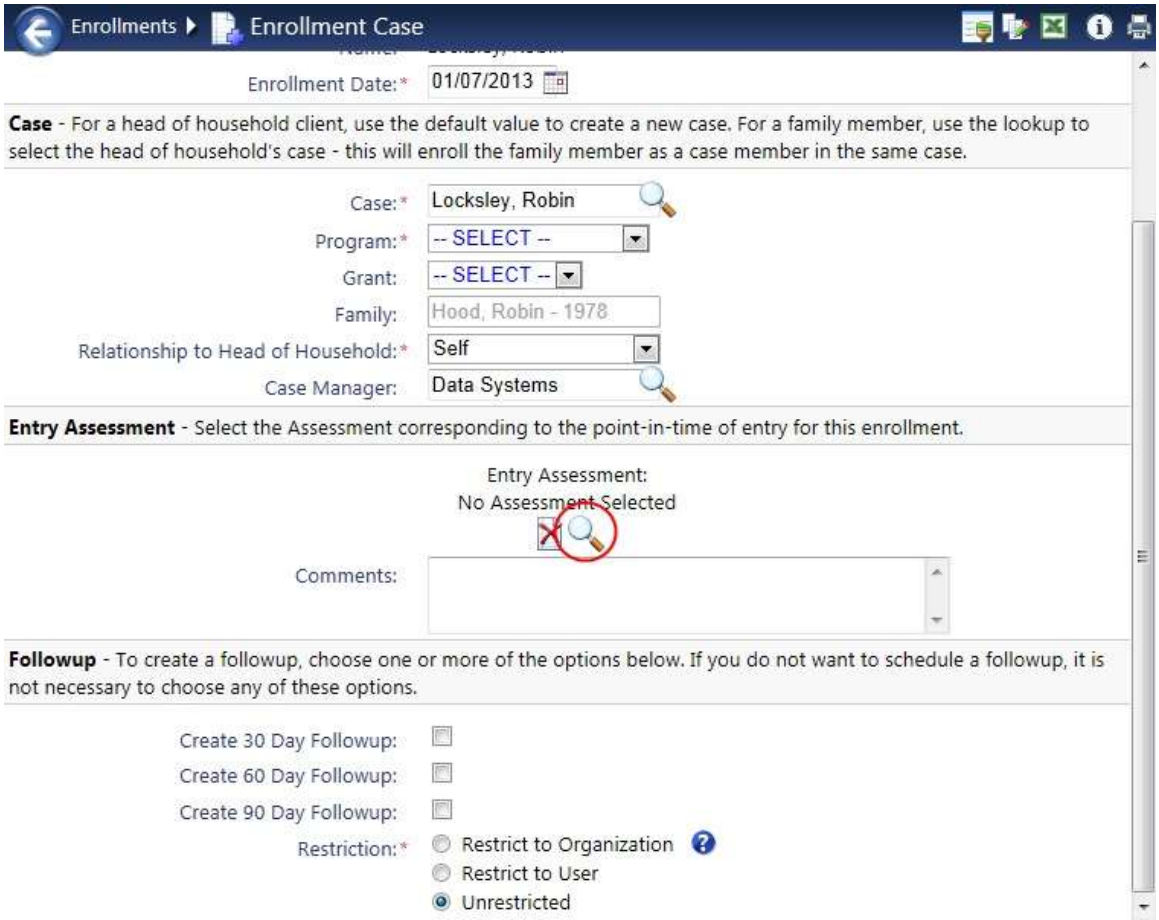


To enroll a client in a program:

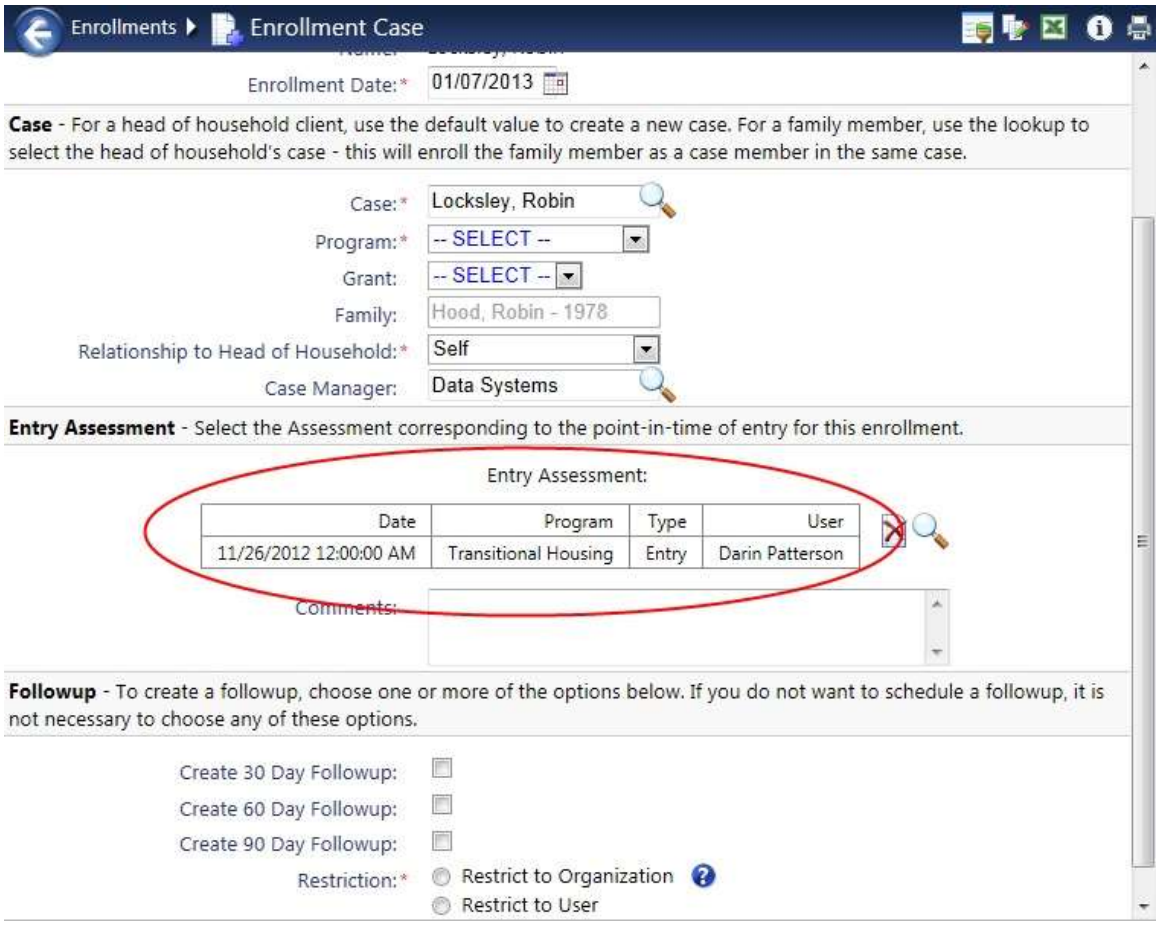
1. On the Enrollments page, click Add New.



2. Enter the Enrollment Date
3. Enter the Case for the enrollment. This defaults to the current client, but you can look up a head of household to enroll this family member in another case.
4. Select the Program to enroll the client in
5. If you wish to associate the enrollment with a Grant, select the correct Grant. This is often used for reporting purposes. For example, the HUD APR is dependent on associating the enrollment with a grant.
6. Change the Relationship to Head of Household and Case Manager, if necessary.
7. The next section allows you to associate the enrollment with an assessment. This section uses the assessment plug in which you will see on many forms that use assessments.
    a. Click on the magnifying glass icon to search for existing assessments or create a new assessment.



b. Once an assessment has been selected (by clicking on a search result or adding a new assessment) the plug in will display information about that assessment.

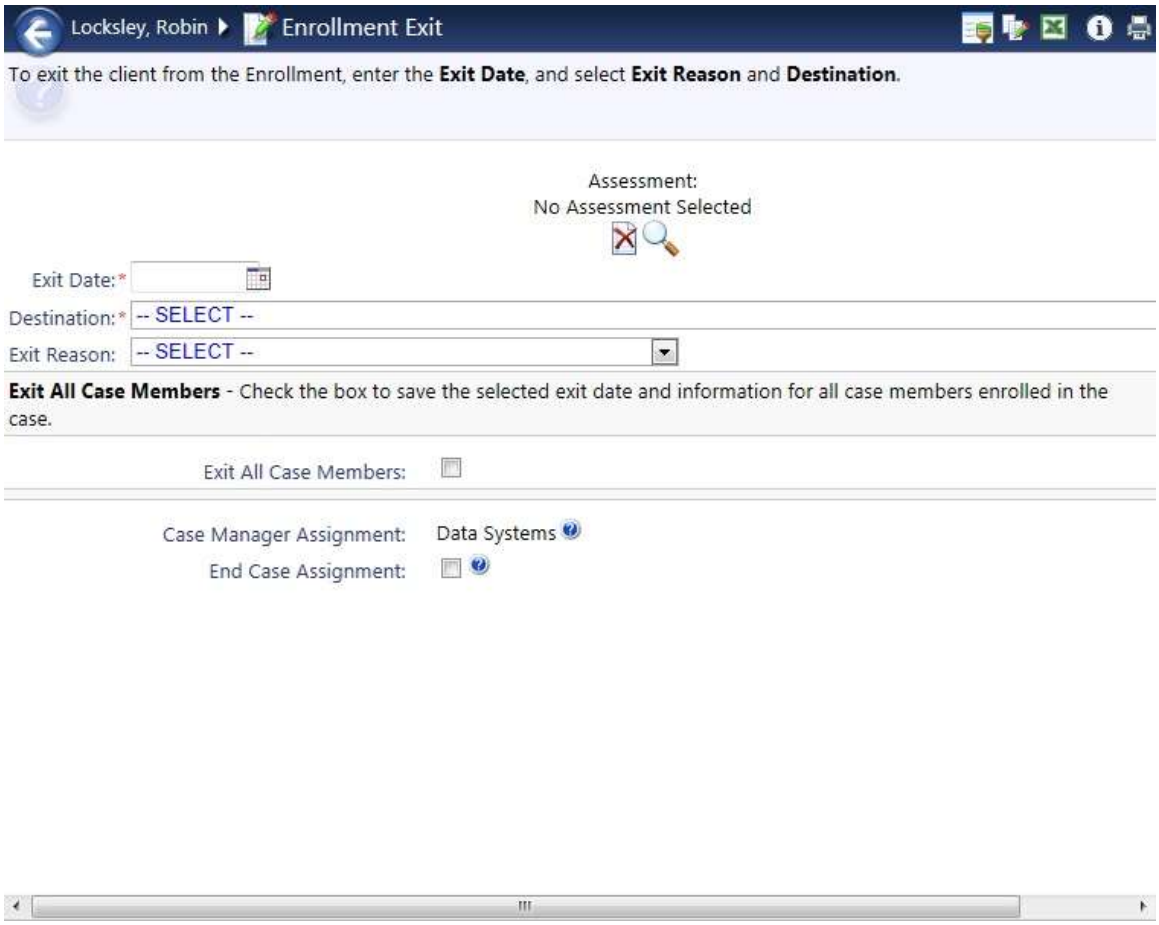


c. If you want to disassociate the assessment from the enrollment simply click on the delete icon to the left of the magnifying glass.

8. The next section allows the user to initiate a follow up. This will create a task scheduled for 30, 60, or 90 days after the enrollment date. The task will be created for both the client enrolled and the case manager identified in the case section.

Once an enrollment is created it will appear on the enrollments page. Clicking the action button  will allow you to perform the following tasks.

1. Edit the information entered when the enrollment was created.
2. Case Members, Goals, Action Plan, and Services are all used to collect their respective data points with a reference to the enrollment.
3. When the enrollment period has ended click on 'Exit the Enrollment'. This will prompt you for some data related to exiting the enrollment.



a. The assessment plug in is used here to associate the enrollment with an exit assessment. As mentioned above, this is important for measuring outcomes in that it allows comparison between the entry and exit assessments.
b. Use the 'Exit All Case Members' checkbox to exit every member of the case associated with this enrollment.

Recording Assessments

What are assessments and how are they recorded in ClientTrack?

Assessments are snapshots about a client concerning basic information like education, financial, health, and employment issues as well as barriers to client success. Unlike basic client information, such as name, address, and family information, assessments track client data that generally varies over time. After adding a new client and entering basic client information, the next step in ClientTrack involves recording client assessment information used to create goals and action plans. Depending on organization setup, client assessments can be accomplished through workflows, which are discussed later in this document. This section explains some of the different types of assessments and how to enter them individually. HMIS assessments, which are normally recorded through workflows, are also discussed later in this guide.

ClientTrack offers many different submenus in the Assessments section in order to evaluate client issues. To better explain the assessment process in ClientTrack, the following section divides the submenus into four basic groups: Master Assessment, Informational Assessments, Barriers, and the client Self-Sufficiency Matrix. The process to enter information and record client assessments is essentially the same for all categories.

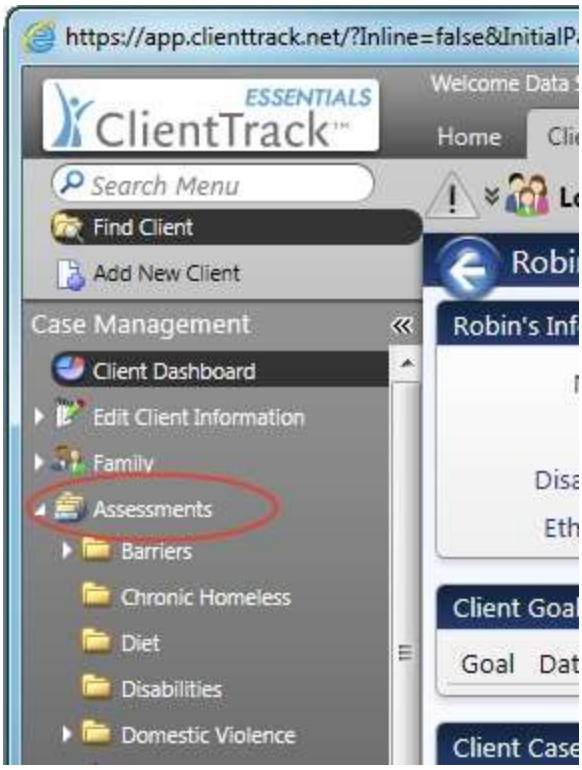
Master Assessments

What is a Master Assessment and how is it used in ClientTrack?

A Master Assessment ties together a number of separate, detailed assessments/data elements to a single process at a particular point in time. Data presented in the Master Assessment is controlled by the system administrator and is based on requirements of the Annual Progress Report (APR) if applicable. Master Assessments are normally created during Workflows, which will be explained later. The Master Assessment form creates an Assessment ID, which is used to tie all program-specific assessments together.

To access Master Assessments in ClientTrack:

On the Clients tab in the Case Management menu, click Assessments.



To create a new Master Assessment:

Note: Master Assessments are normally created during Workflows setup by the system administrator.

1. On the Master Assessments page, click Add New.

2. On the Master Assessment page, enter an Assessment Date.

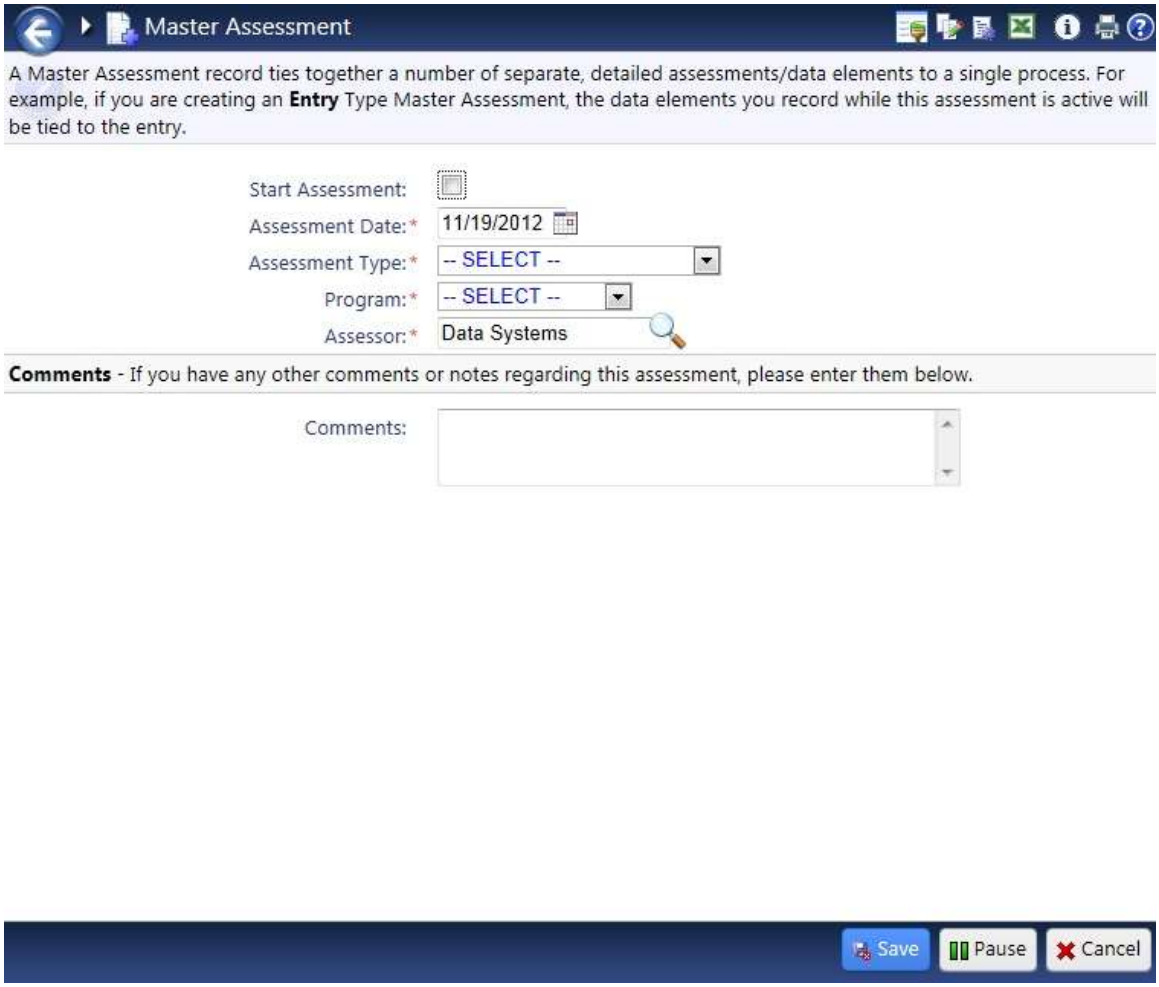
3. Select an Assessment Type.

4. Select a Program in which you intend to enroll the client.

5. ClientTrack automatically fills in the Assessor as the current user name.

6. Include any Comments.

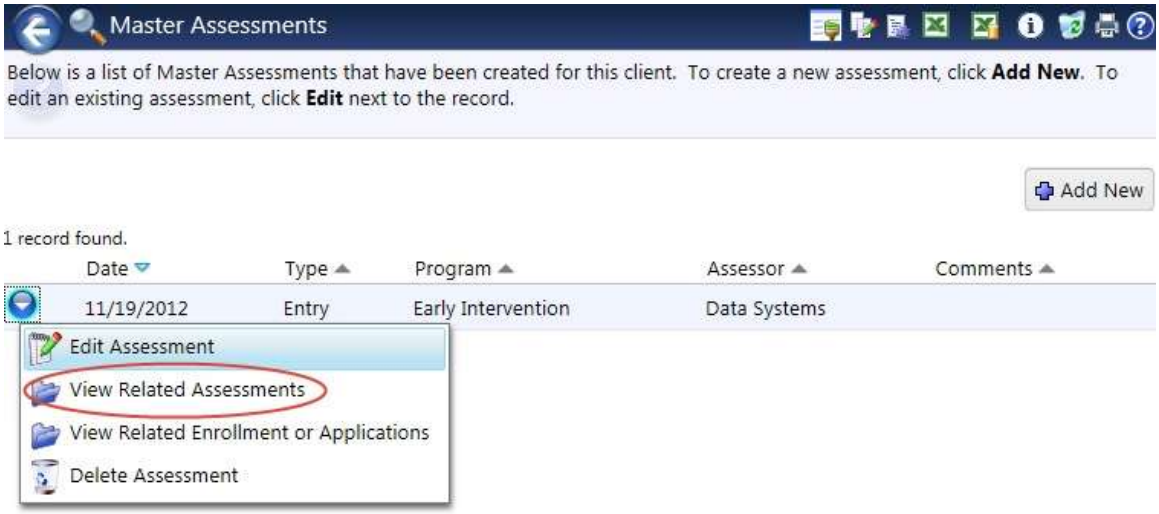
7. Click Save.



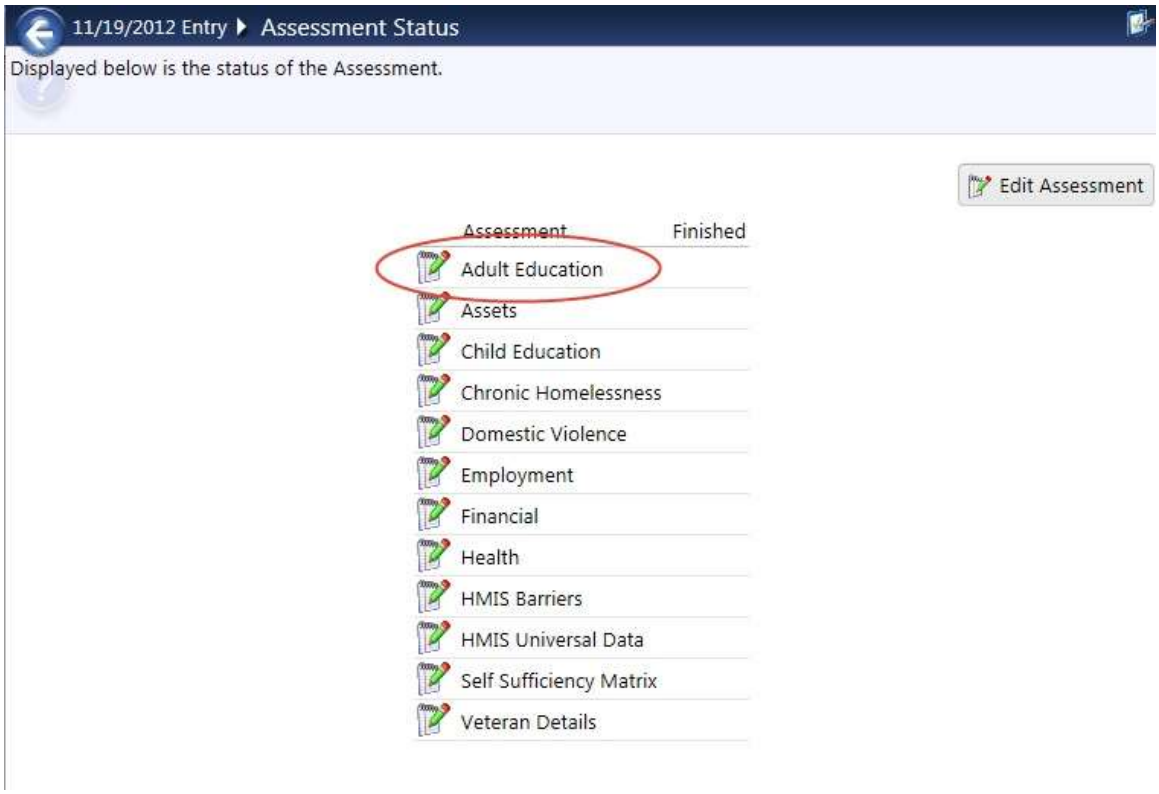
Once a Master Assessment has been created, it will appear on the Master Assessments page.

Clicking on the Action Menu  next to the assessment displays user options.

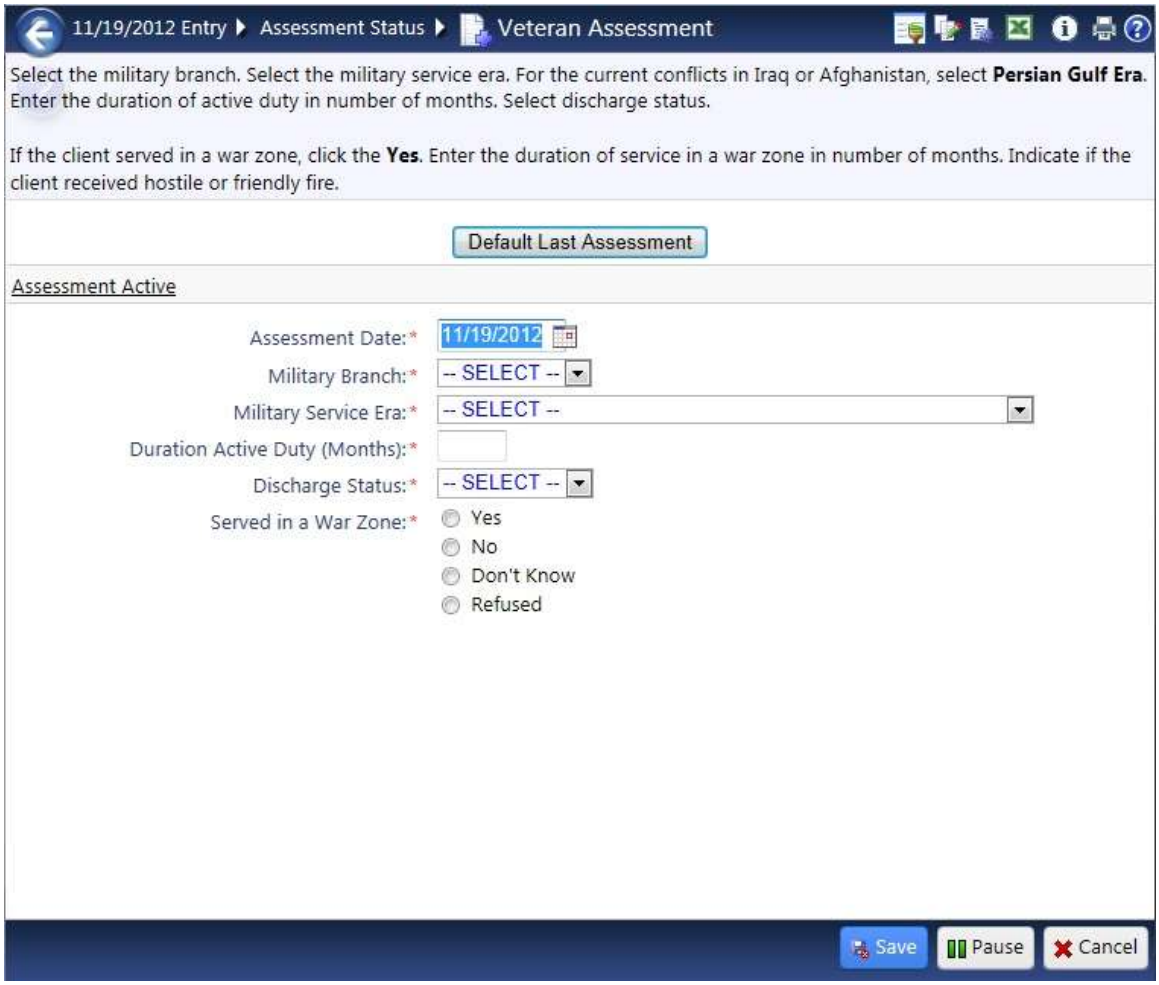
1. To enter individual assessments for this Master Assessment, click View Related Assessments.



2. On the Assessment Status page, click on the individual Assessments to access the entry page for each assessment.



3. Illustrated below is the Veteran Assessment page which will be displayed after clicking on Veteran.



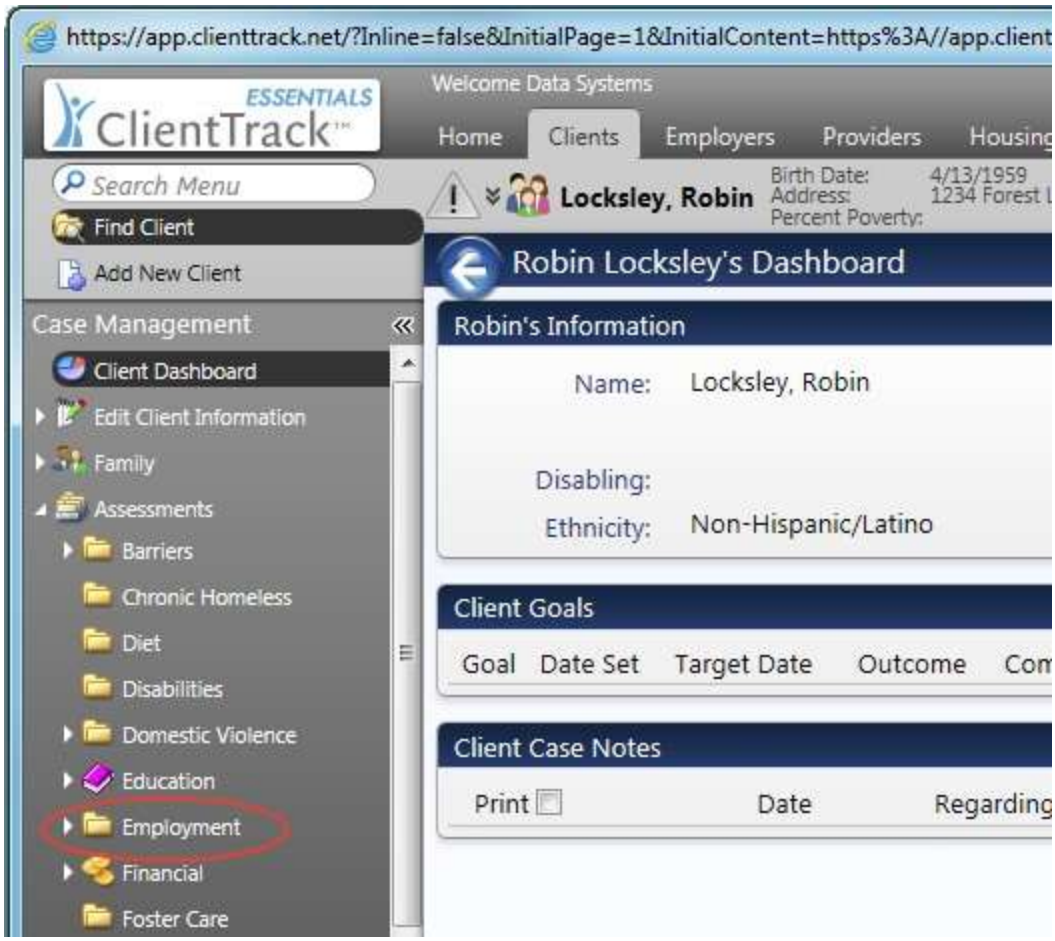
Informational Assessments

What is an informational type assessment and how are they entered in ClientTrack?

Informational assessments are used to collect a broad range of client data including health issues, veteran status, education, work history, and financial information. This type of information aids the case manager in determining the best way to assist clients.

To record client Employment data:

1. In the Case Management menu, click Assessments, and then Employment.



2. On the Employment Assessments page, click Add New.

Tip: Users who are recording an assessment that contains the same data as the previous assessment can save time by clicking Default Last Assessment that appears at the top of the page. By clicking this button, the fields will default to what was recorded during the last assessment.

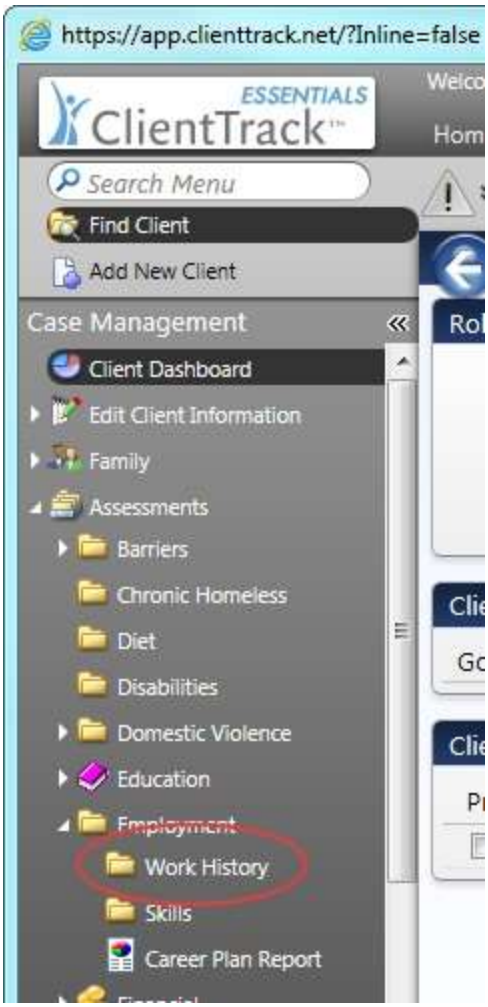
3. On the second Employment Assessment page, complete the appropriate data.

4. Click Save.

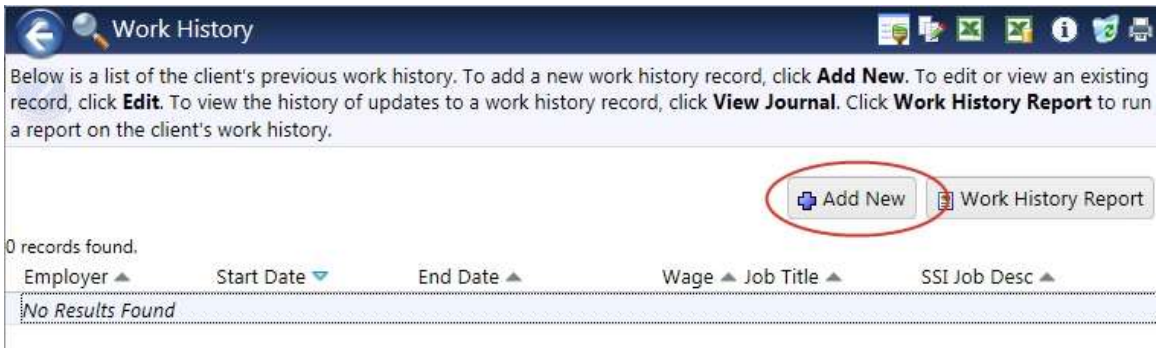
Once an Employment Assessment has been entered it will display on the client's Employment Assessments page. The assessment can be edited or deleted by clicking on the appropriate icons.

To record client Work History data:

1. In the Case Management Options menu, click Assessments, then click Employment, and then Work History.



2. On the Work History page, click Add New.

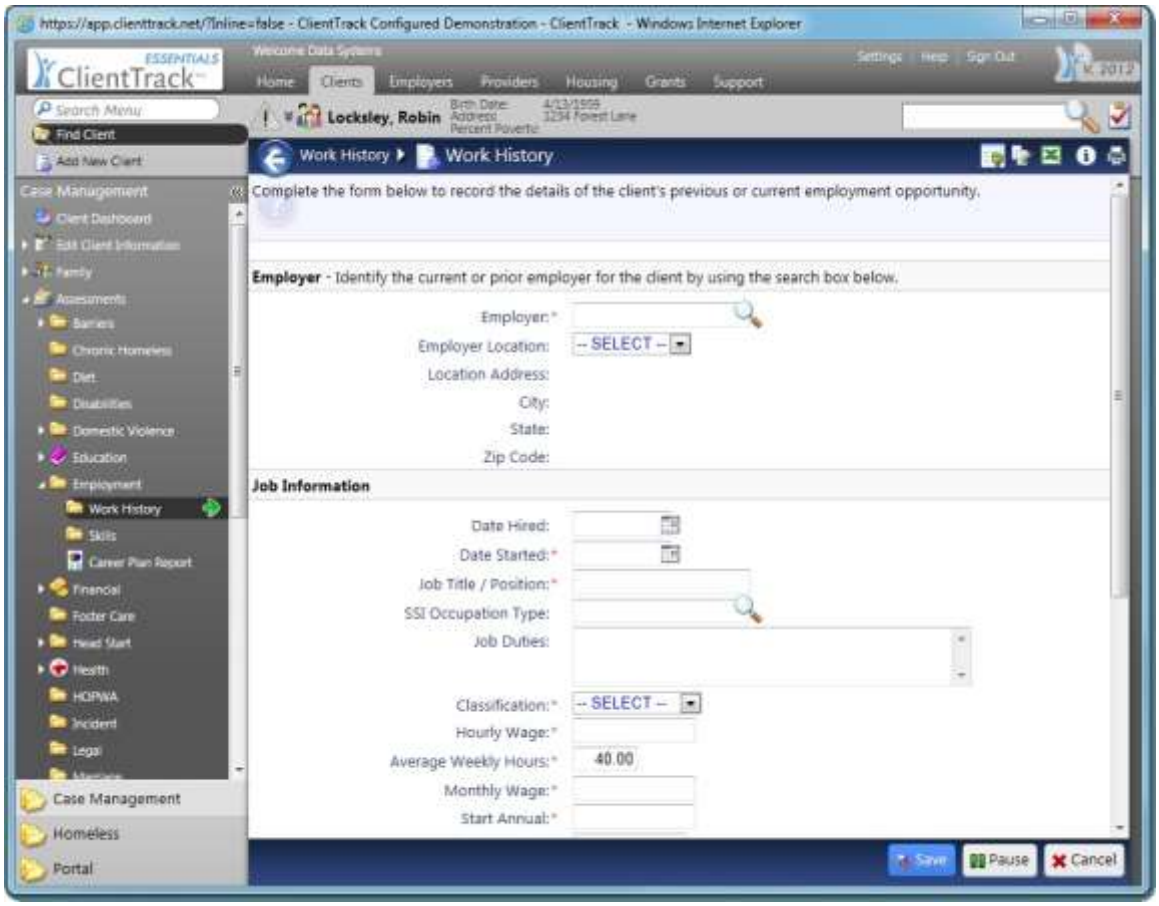


3. Type the Employer name and use the Find icon to locate the employer or add a new employer to the database

4. Type an hourly wage and average weekly hours at the time the client started the job. ClientTrack automatically calculates the Monthly and Start Annual fields.

5. If the client is no longer employed by this employer, complete the Work History – Termination Information section.

6. Click Save.

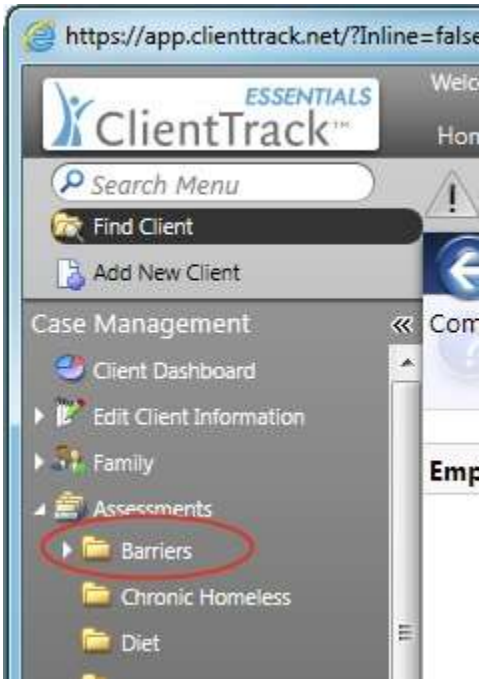


Barriers

Barriers represent personal issues that may affect a client's ability to successfully achieve specific goals. In addition to general barriers, ClientTrack has submenus to record HMIS Barriers and Felonies.

To record client Barriers:

1. In the Case Management Options menu, click Assessments, then click Barriers.



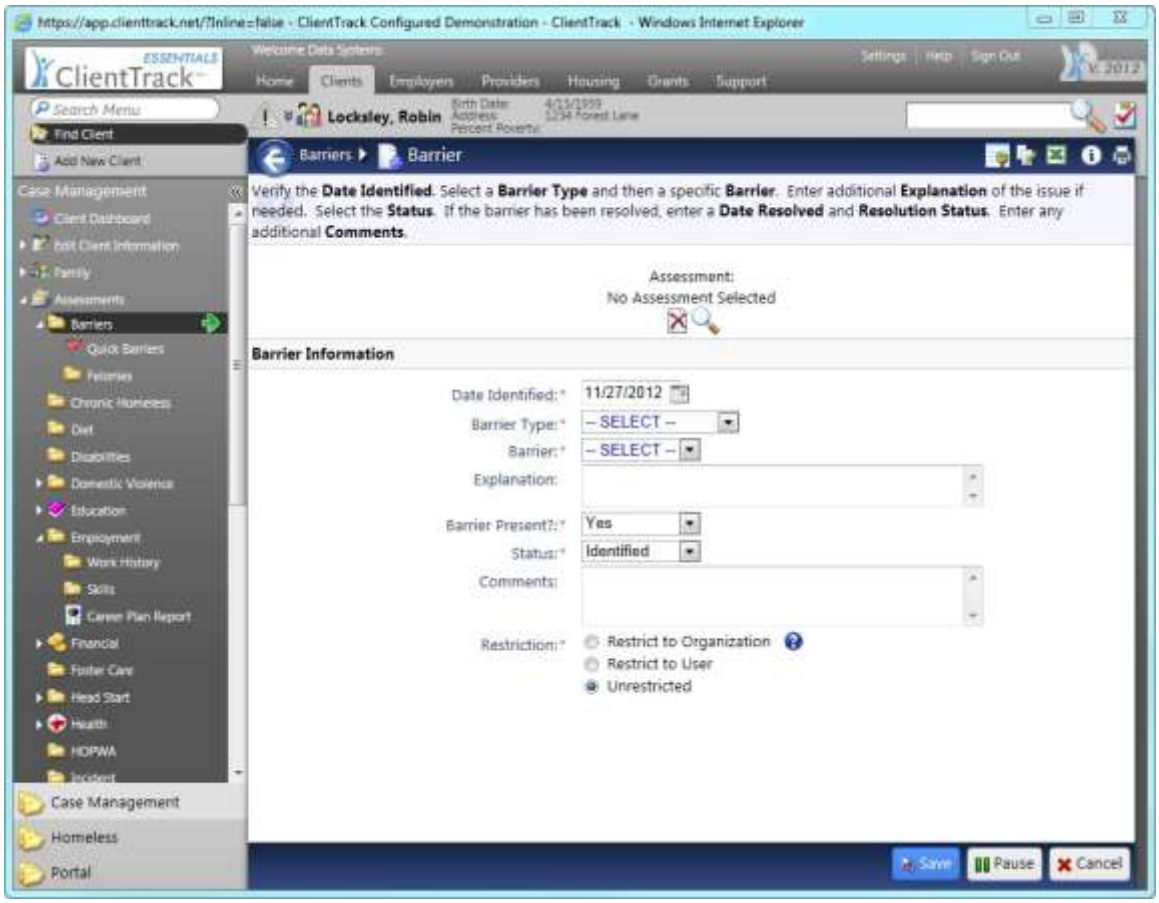
2. On the Barriers page, click Add New.

3. On the second Barrier form, enter the Date Identified.

4. The Barrier Type determines the barriers displayed in the Barrier dropdown menu, so select a Barrier Type before selecting an Issue.

5. Enter the additional information concerning the Barrier.

6. Click Save.



Once a Barrier has been entered it will display on the client's Barriers page. The assessment can be edited or deleted by clicking on the appropriate icons.

How are HMIS Barriers recorded in ClientTrack?

HMIS Barriers are recorded in the same manner as Barriers (described above), except that you must select HMIS Barriers as the Barrier Type.

Quick Barrier Entries

ClientTrack offers an alternative method to enter multiple client barriers on a single page.

To record client barriers using Quick Barrier entry:

1. On the Barriers page, click Quick Barriers.

2. On the Quick Barriers screen, verify Barrier is displayed in the Screen dropdown menu. Selections in the dropdown menu are controlled by the system administrator.

3. Identify the client's barriers by clicking the checkbox next to the appropriate Barrier. Clicking the checkbox in the header row (next to Barrier), will select all Barriers listed on the page.

4. If desired, type an Explanation.

5. Select a Restriction from the dropdown menu.

6. If your organization is set up to record case notes for a barrier, the Edit icon will be displayed to the right of the Restriction column. To enter case notes, click on the Edit icon. The Case Note editor will open and case notes can then be recorded.

7. If your system administrator has added help information for the specific Barrier, the Help icon will be displayed in the Help column. Positioning the mouse pointer over the icon will display the Help information.

8. When finished recording Barriers, click Save.

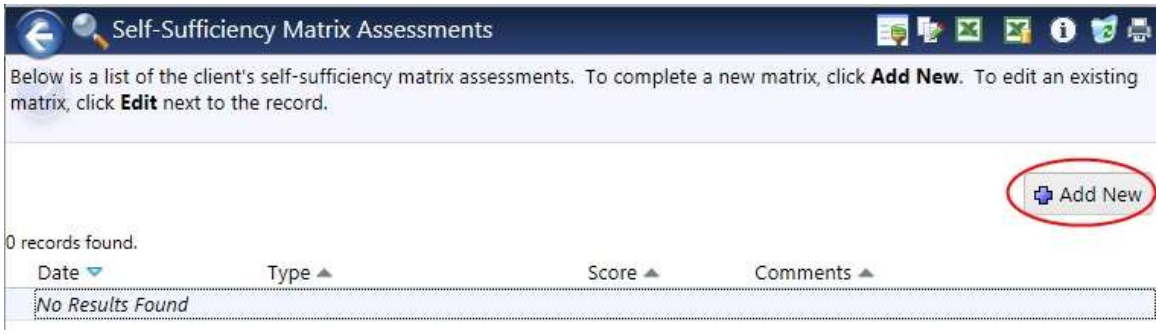
Self-Sufficiency Matrix

A client's Self-Sufficiency Matrix is a case manager's evaluation of a client's level of self-sufficiency at a particular point-in-time recorded in numerical format.

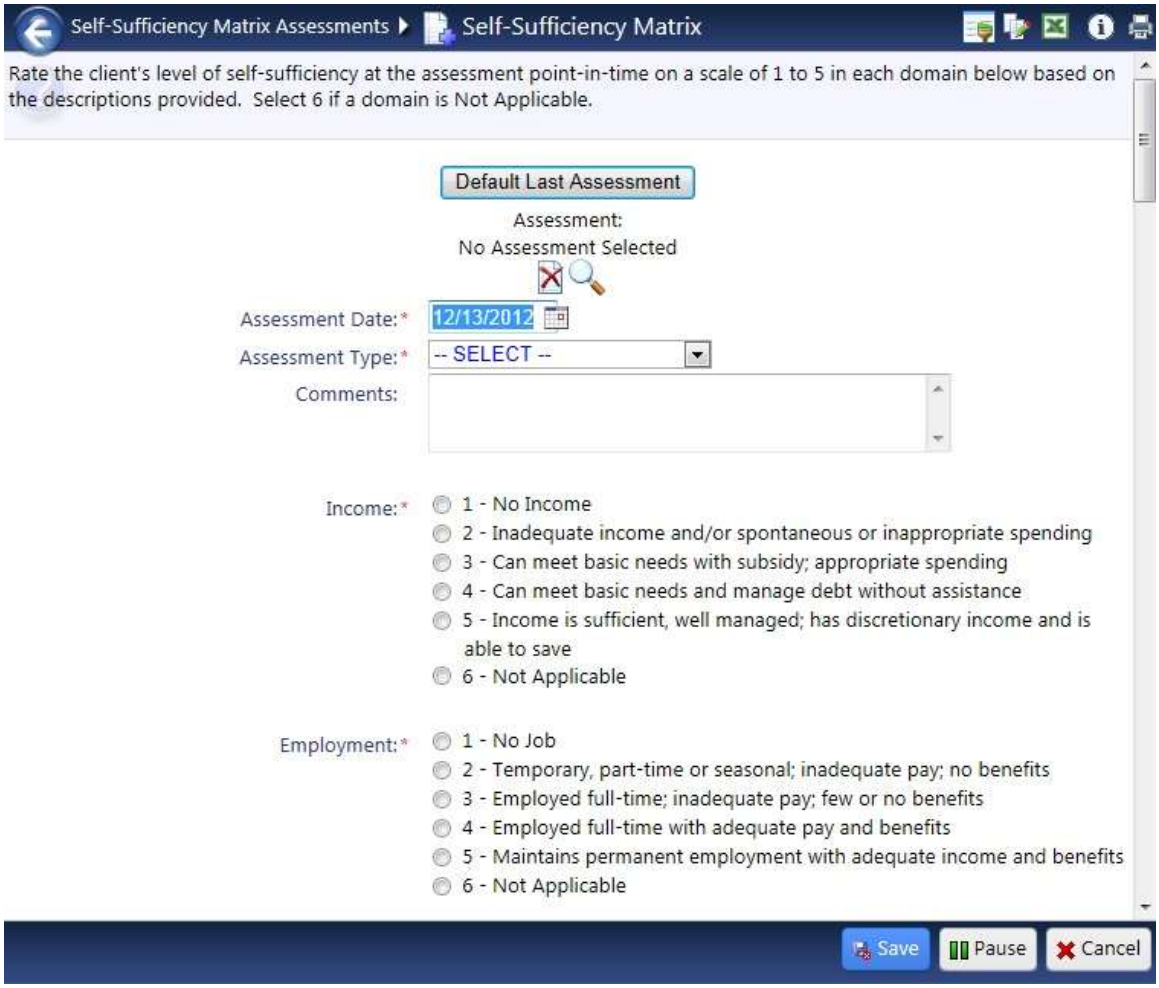
To create a Self-Sufficiency Matrix in ClientTrack:

1. In the Case Management menu, click Assessments, and then click Self-Sufficiency Matrix.

2. On the Self-Sufficiency Matrix Assessments page, click Add New.



3. On the Self-Sufficiency Matrix page, rate the client's level of self-sufficiency using a scale of 1 to 5 for each area of assessment by clicking the applicable radio button. Select 6 if a particular assessment area is not applicable to the client.



4. ClientTrack adds the values entered for each assessment and displays the total at the bottom of the page. Click Save.

Self-Sufficiency Matrix Assessments ▸ Self-Sufficiency Matrix

lethality is high
- 3 - Current level of safety is minimally adequate; ongoing safety planning is essential
- 4 - Environment is safe,however, future of such is uncertain; safety planning is important
- 5 - Environment is apparently safe and stable
- 6 - Not Applicable

Parenting Skills:*
- 1 - There are safety concerns regarding parenting skills
- 2 - Parenting skills are minimal
- 3 - Parenting skills are apparent but not adequate
- 4 - Parenting skills are adequate
- 5 - Parenting skills are well developed
- 6- Not Applicable

Credit History:*
- 1 - No credit history
- 2 - Outstanding judgments or bankruptcy/foreclosure
- 3 - Has a credit repair plan
- 4 - Moderate credit rating
- 5 - Good credit / manageable debt ratio
- 6 - Not Applicable

Matrix Score Summary - The Matrix Score calculates the average of all domain scores between 1 and 5, excluding domains where Not Applicable is selected.

Matrix Score: 3.06

Restriction:
- Restrict to Organization
- Restrict to User
- Unrestricted

Save | Pause | Cancel

Once a client Self-Sufficiency Matrix has been entered it will display on the client's Self-Sufficiency Matrix Assessment page. The assessment can be edited or deleted by clicking on the appropriate icons.

Self-Sufficiency Matrix Assessments

Below is a list of the client's self-sufficiency matrix assessments. To complete a new matrix, click **Add New**. To edit an existing matrix, click **Edit** next to the record.

Add New

1 record found.

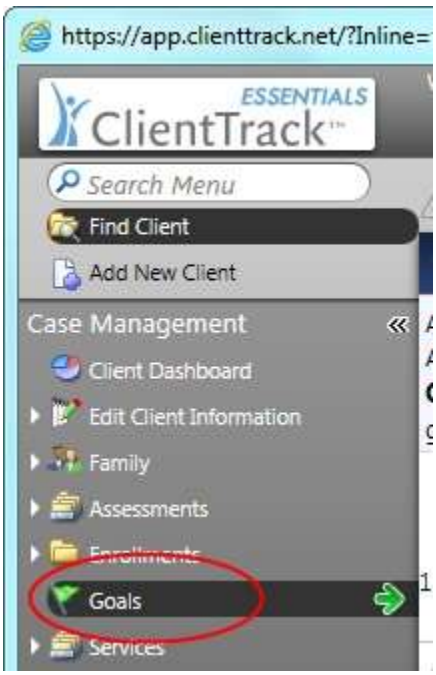
	Date	Type	Score	Comments
	12/13/2012	Entry	3.06	

Setting Goals

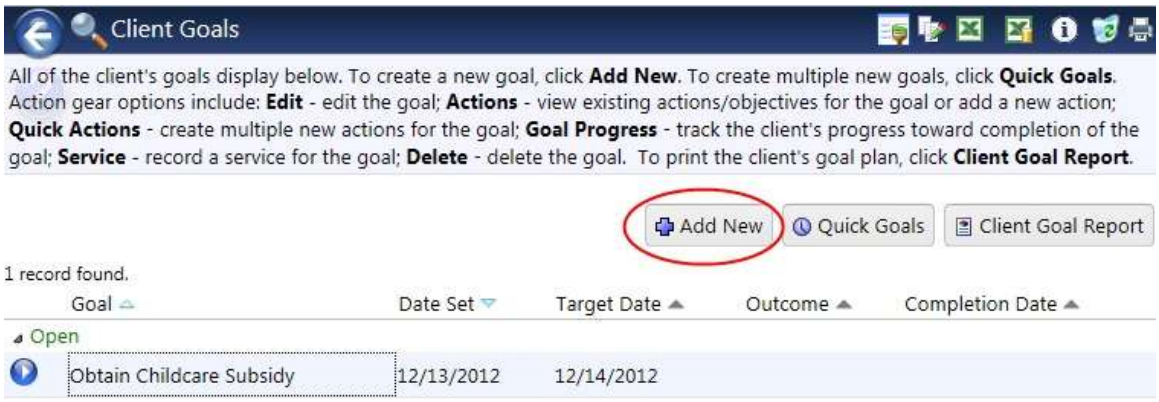
Once you have entered a client into the ClientTrack database and conducted a personal assessment, you can then assign goals to the client and establish action plans to achieve those goals. In addition, you can link specific services to those goals/action plans.

To assign client goals individually:

1. On the Clients tab in the Case Management menu, click Goals.



2. On the Client Goals page, click Add New.

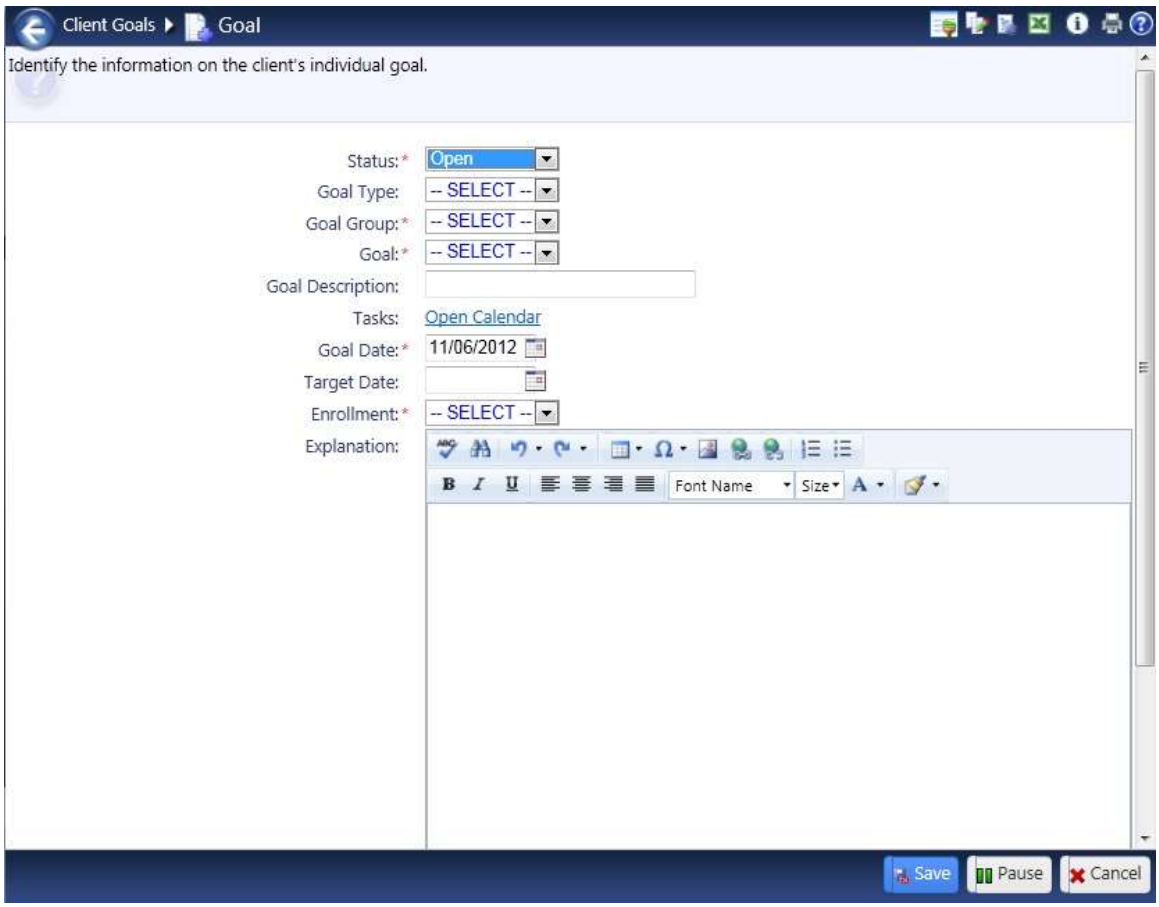


3. On the Client Goals page, complete all applicable entries concerning the Goal.

4. The Goal Type determines the Goals displayed in the Goal dropdown menu, so select a Goal Type before selecting Goal.

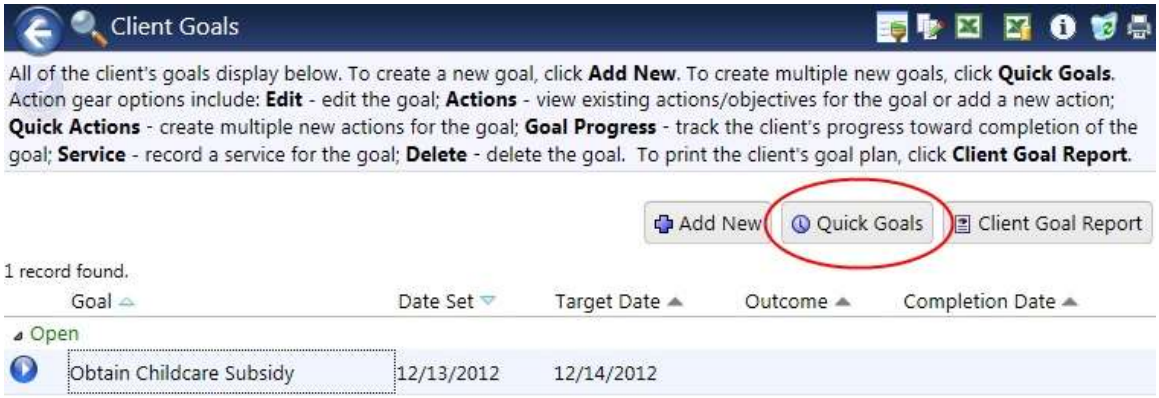
5. Type any detailed information concerning the client's goal in the text editor.

6. Click Save.



To assign multiple client goals quickly:

1. On the Client Goals page, click Quick Goals.



2. Select the appropriate Screen and Goal Type from the dropdown menus. These menus are a method to filter goals, and they are configured by the system administrator.

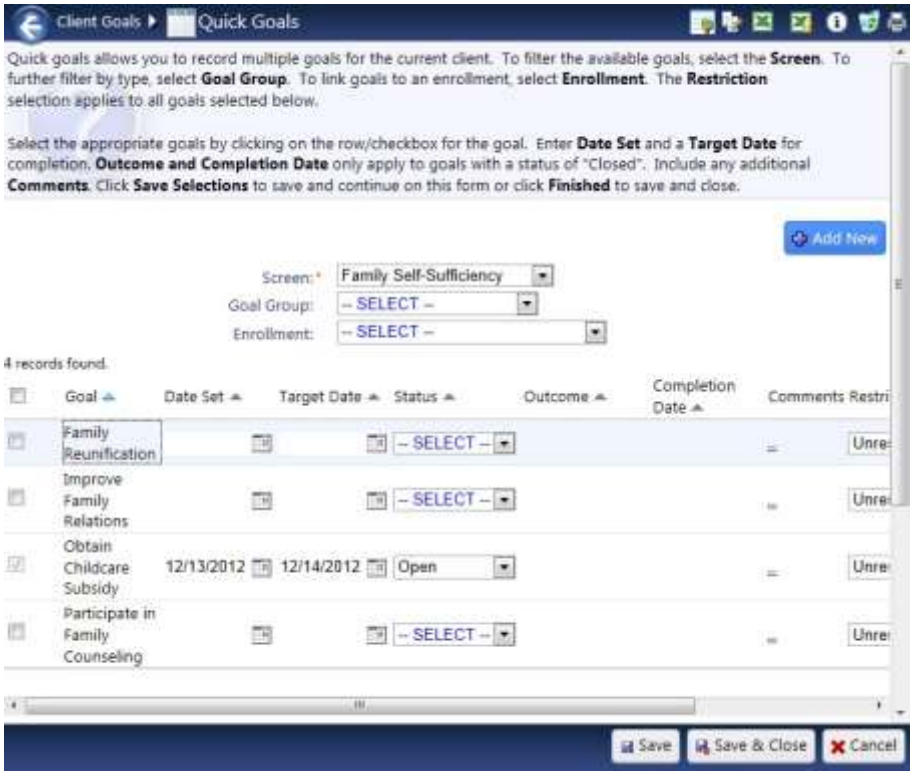
3. Check the box next to each Goal you would like to assign to the client.

4. To link goals to an Enrollment in a specific program, select the program in the Enrollment dropdown menu.

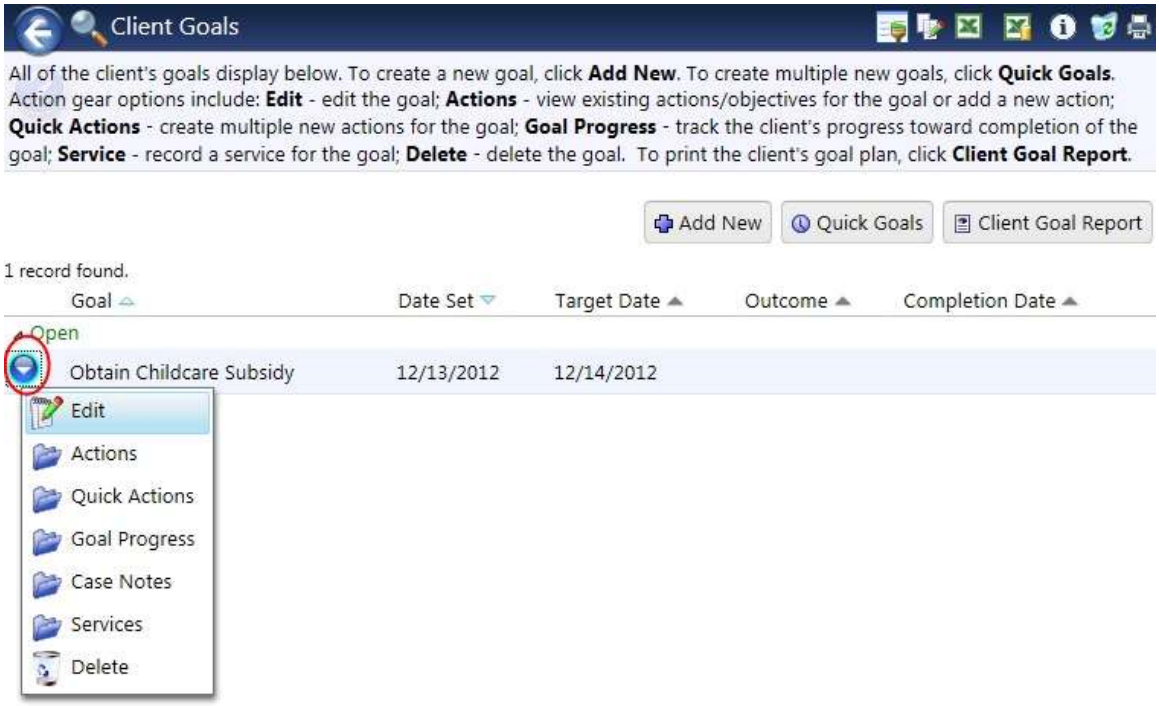
5. To assign all goals on the page to the client, check the box next to Goal.

6. Enter a Target Date and any Comments.

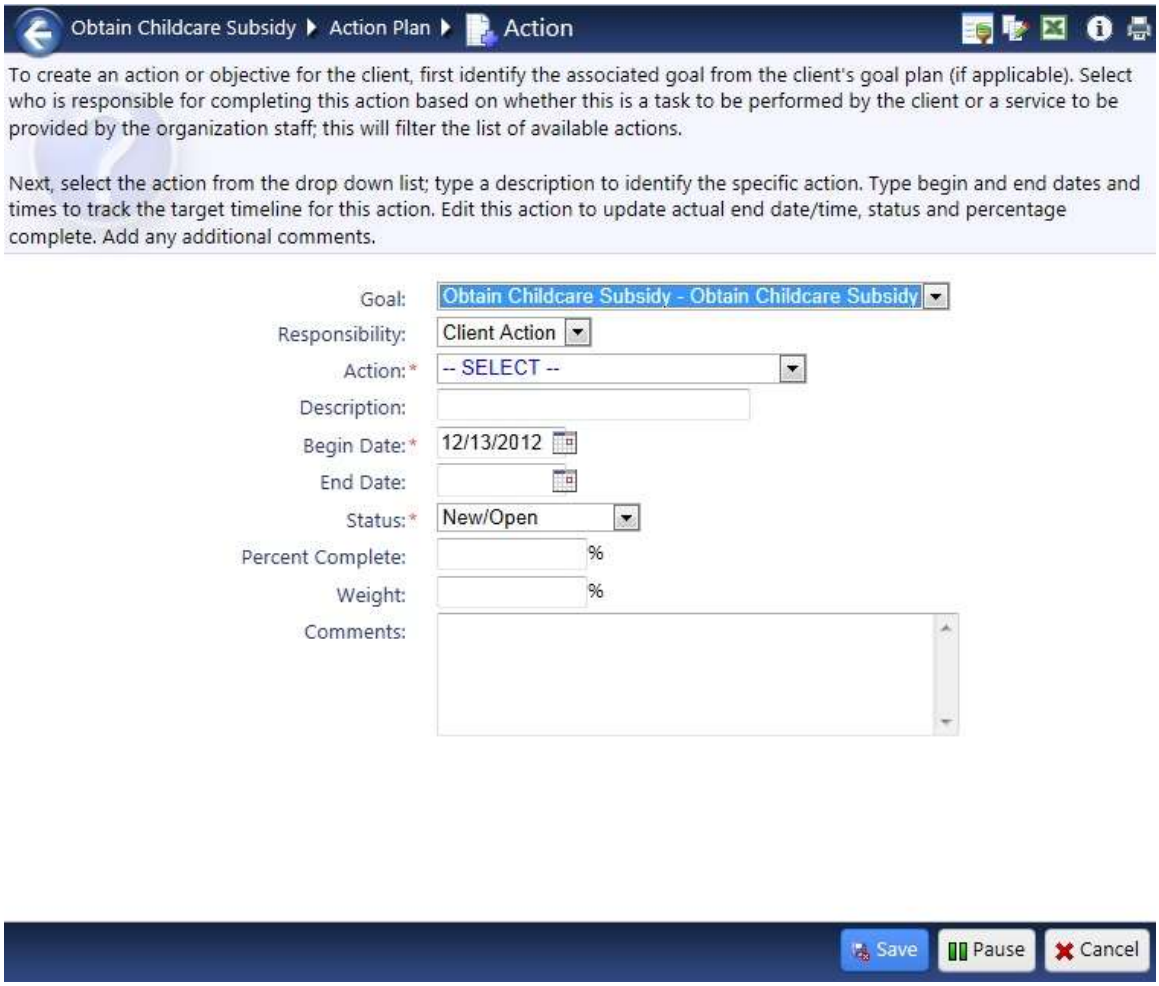
7. Click Save.



After client goals have been recorded, the client manager can edit the goals, establish an action plan to achieve the goals, track goal progress, and record a service for the goal. To access these options, on the Client Goals page, click the Action Menu next to the goal. To change any previously entered information concerning the goal, click Edit.



1. To set up an action plan to accomplish the client goal, click Actions.
2. On the Action Plan page, click Add New.
3. Enter the appropriate data on the Action page.
4. Click Save.



5. Depending on system configuration, clicking Quick Actions will open a spreadsheet where multiple actions may be entered quickly.

6. To track goal progress click Goal Progress.

7. To set up Services, click Services.

8. In the Service page, enter the information about the service provided to the client.

9. Click Save.

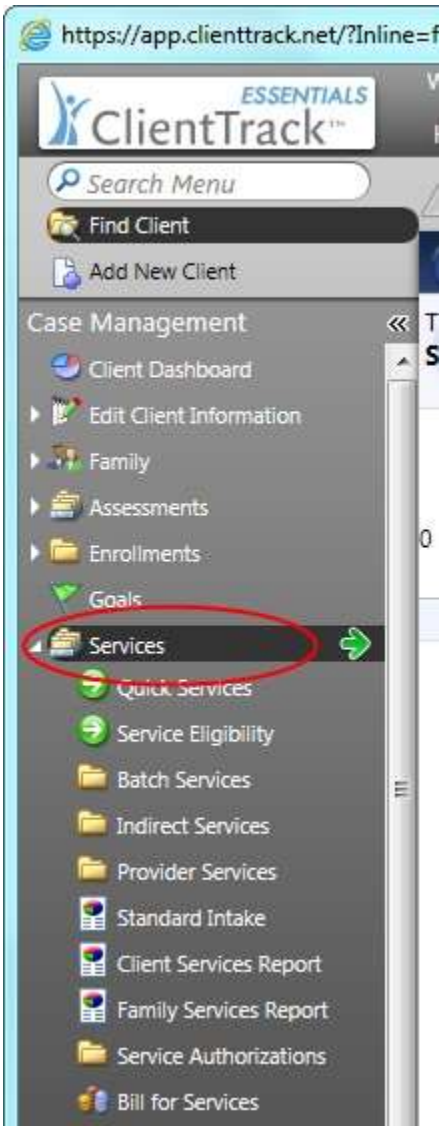
Recording Services

How does the case manager record services provided to a client in ClientTrack?

Services provided to clients are normally recorded on the Quick Services page accessed through the Case Management area of ClientTrack.

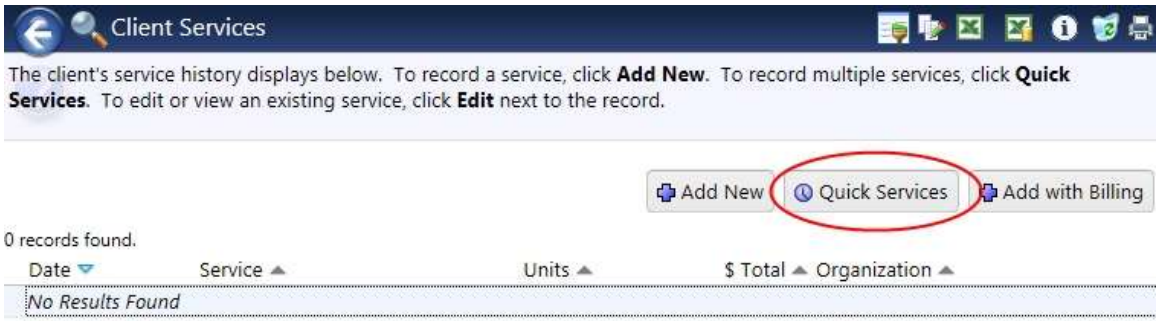
To access the Services area of ClientTrack:

On the Clients tab in the Case Management menu, click Services.



To record Services using Quick Service:

1. On the Client Services page, click Quick Service.



2. On the Quick Services page, select the appropriate Screen filter and Grant from the dropdown menus.
3. Type the Provider name or search for the provider's name by clicking the Find icon.
4. Record each Service provided to the client by checking the checkbox next to the particular Service.
5. Type the number of service Units provided to the client, the unit cost, and $/Unit. Depending on your organization's setup, the unit cost may appear automatically.
6. When finished recording services corresponding to the parameters entered at the top of the page, click Save Selections.
7. To record Services provided under a different set of parameters, repeat steps 2-6.
8. When finished recording Services, click Finished.

Client Services ▸ Quick Service

Use the **Service Screen** list to filter services available. You may also filter services available by **Grant** and/or **Provider**. Select the services the client has received and verify the **Units** and **Unit Values**.

Service Screen:* Direct Services

Family Income:

No Recent Income	
Family Members:	1
Poverty Level:	$907.50

Date:* 12/13/2012

Grant: -- SELECT --

Provider Name:

Enrollment:* -- SELECT --

User Performing the Service(s): Data Systems

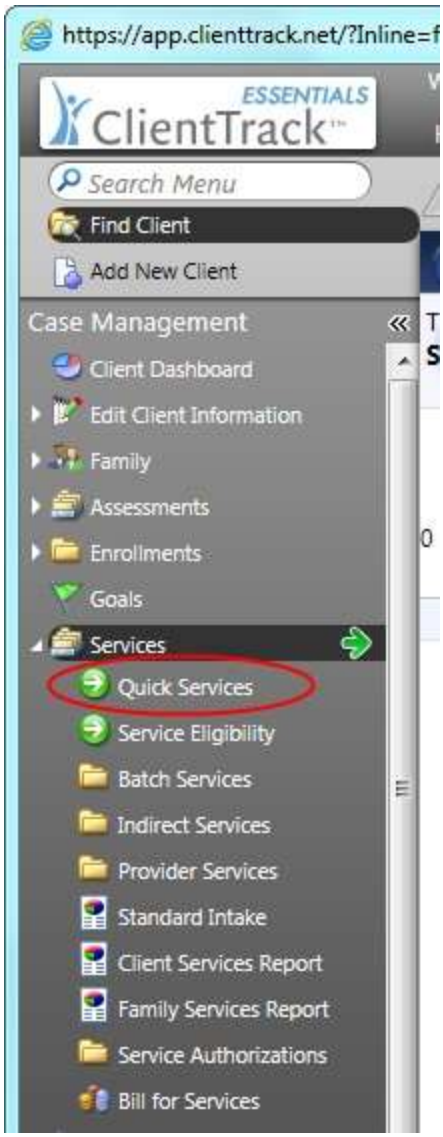
Location: Training

10 records found.

Service*	Unit Type	Units*	Unit Value*	Total Help	Restriction*
Assessments (0)					
Financial Assessment	Minutes	1.00	$1.00	$1.00	Restrict to Organization
Basic Needs (0)					
Clothing	Count	1.00	$1.00	$1.00	Unrestricted
Case Management (0)					
Case Management	Hours	1.00	$0.00	$0.00	Unrestricted
		0.00	$0.00	$0.00	

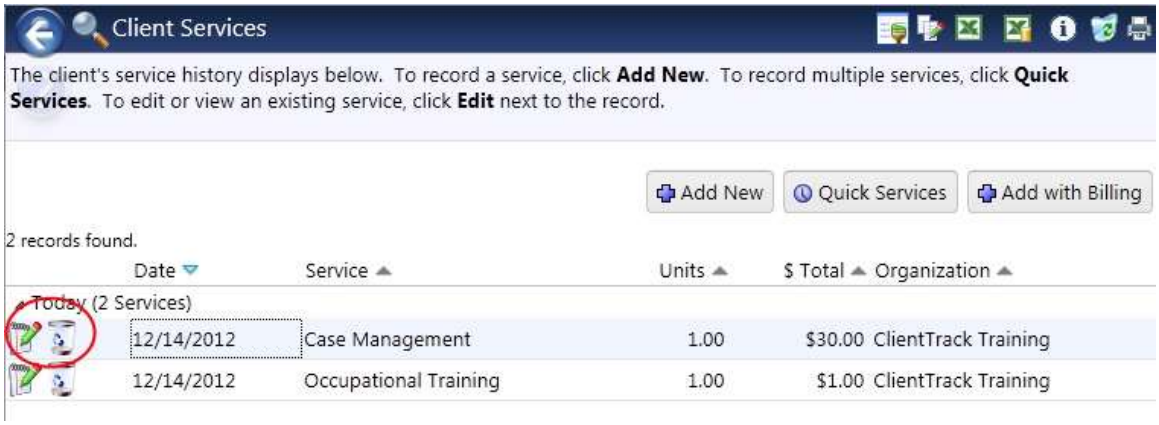
Save | Save & Close | Cancel

Note: The Quick Services page may also be accessed by clicking Quick Service in the Services menu.



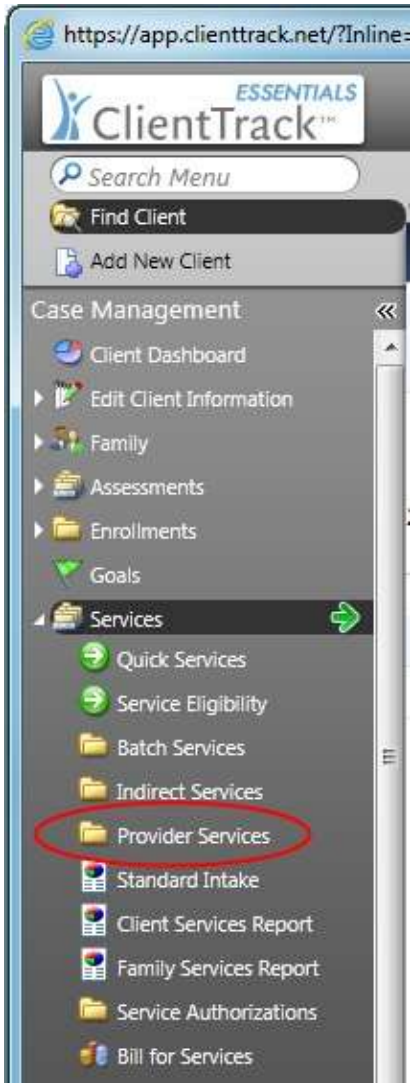
To view or edit a client's service records:

1. On the Clients tab in the Case Management menu, click Services.
2. Click the Edit or Delete icons on the Client Services page.



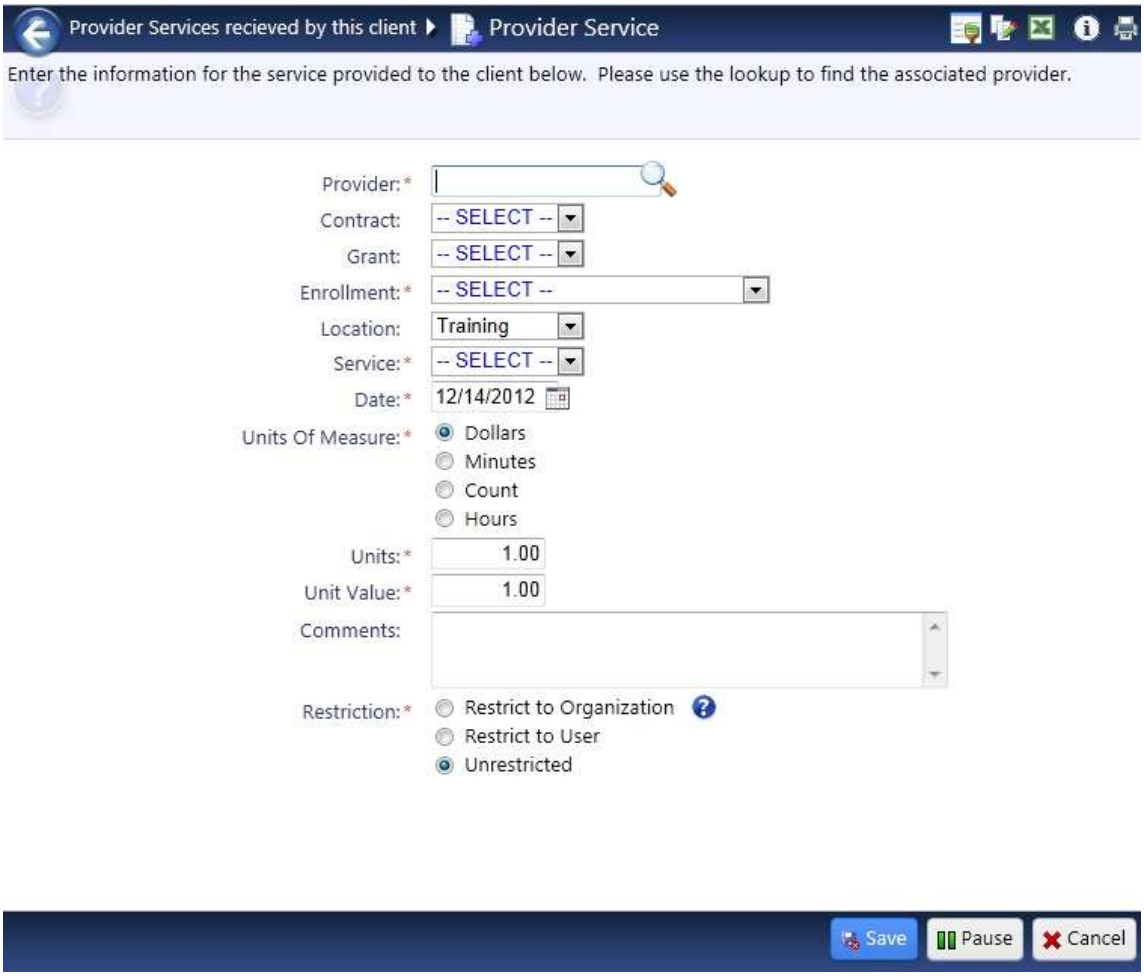
To view a list of a client's existing tasks and services with an associated Provider:

On the Clients tab in the Case Management menu, click Services then click Provider Services.



The Client Services with an Associated Provider page displays all existing tasks and services for the selected client with an associated provider. The Service can be edited or deleted by clicking the Edit or Delete icons. To enter a new Client Service with an Associated Provider, click Add New.

Enter the appropriate information on the Provider Services page, then click Save. The new Service will then be listed on the Client Services with an Associated Provider page.

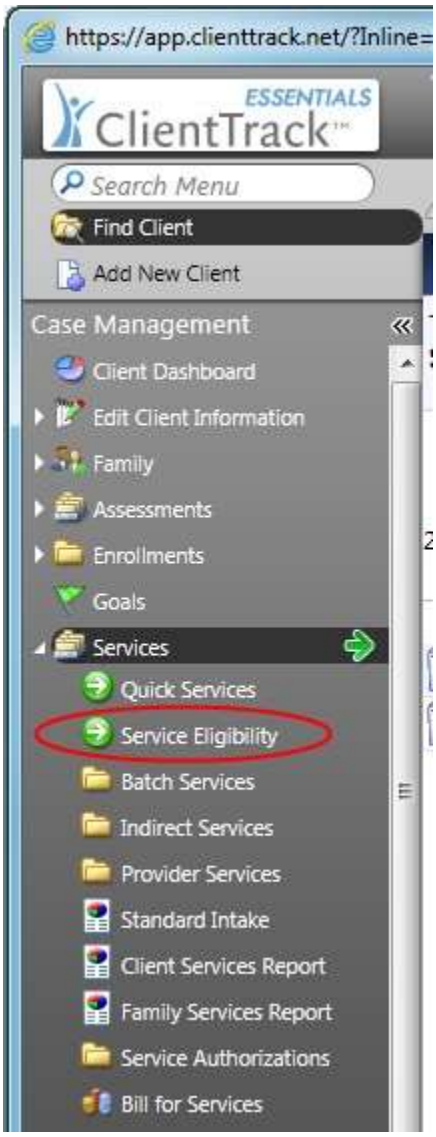


Service Eligibility

The Service Eligibility option in the Services menu assists the case manager in determining client eligibility for certain services. The program uses inputs from the system administrator during setup to determine client eligibility based upon client assessments and barriers.

To access Service Eligibility in ClientTrack:

On the Clients tab in the Case Management menu, click Services then click Service Eligibility.



The Determine Eligibility page displays services and corresponding client eligibility as determined by parameters created by the system administrator.


Service Eligibility
All direct services are listed below. By default only services that have eligibility criteria are displayed. The selected client is evaluated against the eligibility criteria for each service and a result for each is displayed below.
Only Display Services with Eligibility Criteria:
4 records found.
Service
Eligibility Criteria Applied
Eligibility Result
Adult Education
Adult
Passed
Food
Food Assistance
Not enough data
Homeless Prevention
Homeless or at Risk
Not enough data
Prenatal Care
Pregnant
Fail

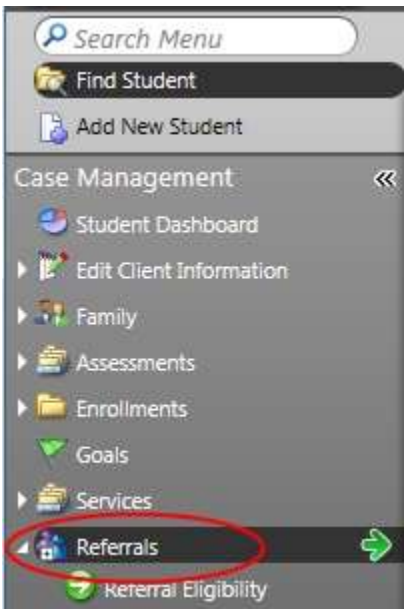
Referrals

What are Referrals and how are they recorded in ClientTrack?

If you are referring a client to another provider for services, you can record the referral as a service. Recording Referral Services is a two-step wizard process.

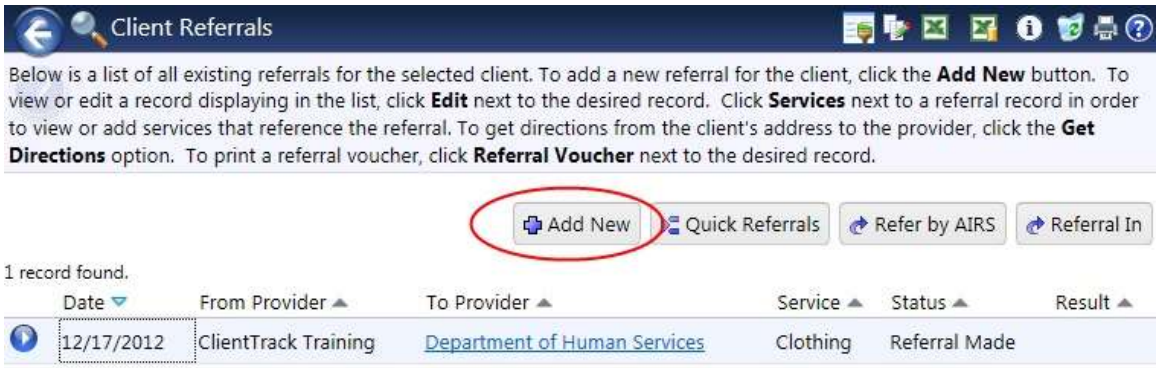
To access Referrals in ClientTrack:

On the Clients tab in the Case Management section, click Referrals.



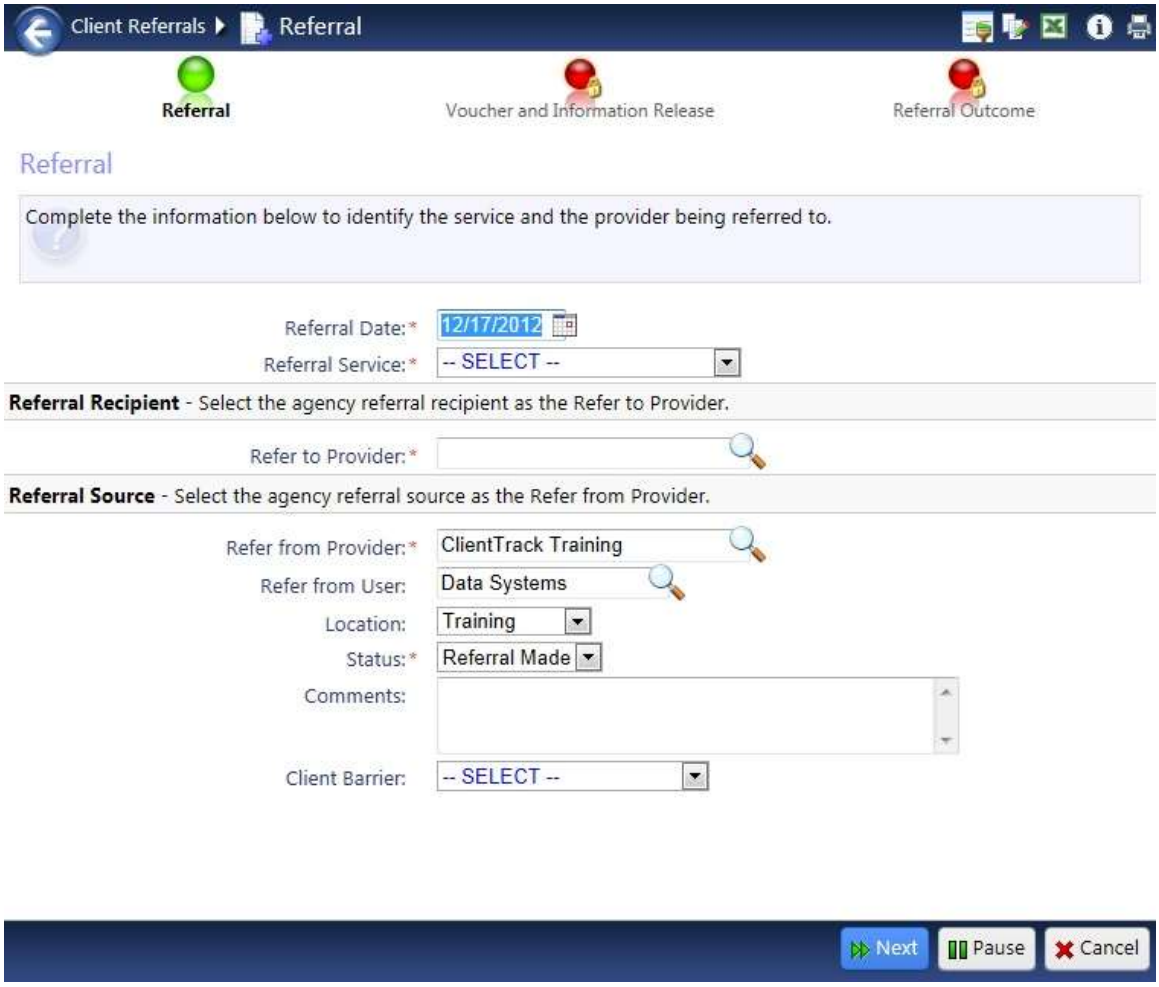
To record client referrals:

1. On the Client Referrals page, click Add New.



2. On second Client Referrals page, enter a Referral Date.

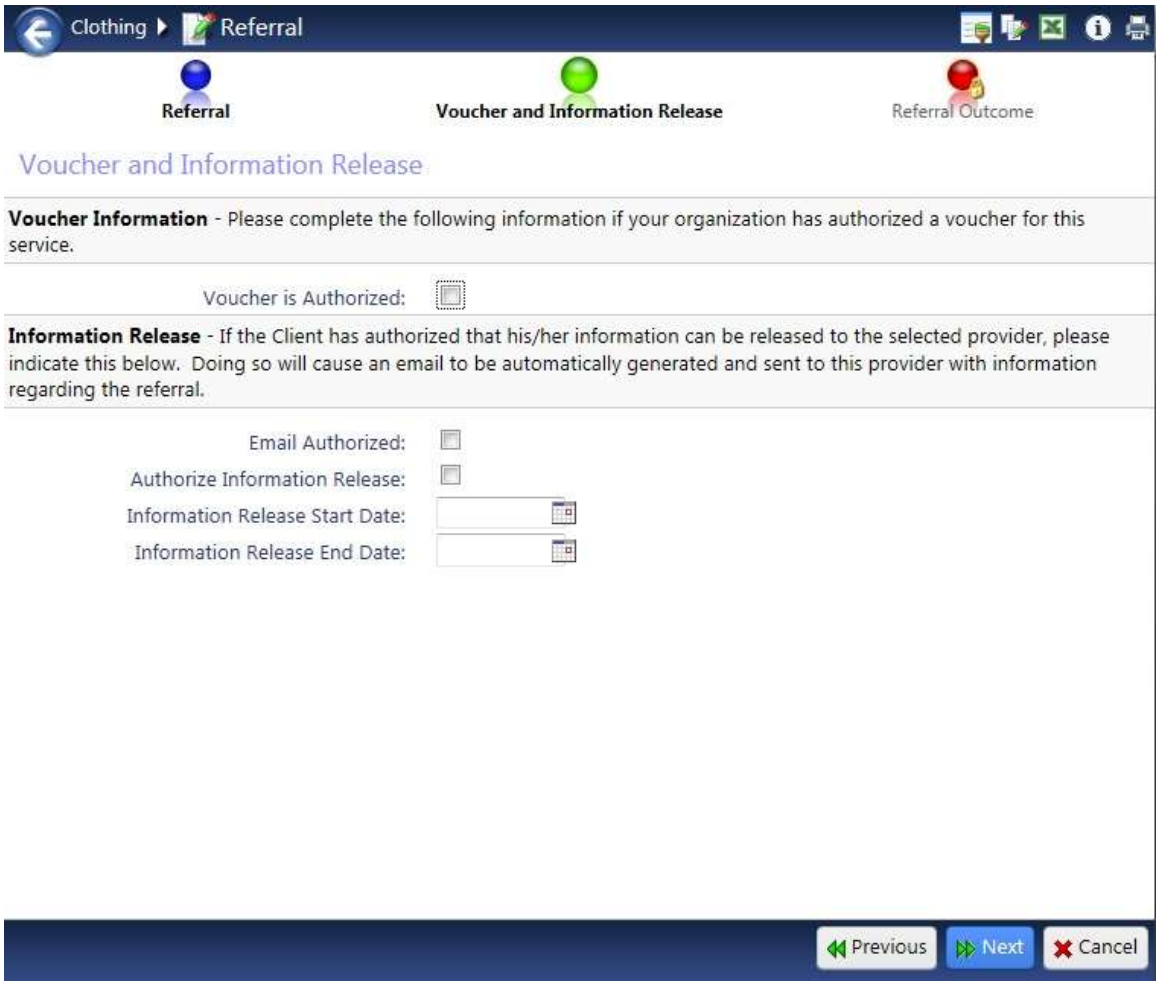
3. If desired, enter a Referral Need.
4. Select a Referral Service from the dropdown menu.
5. Click on the Refer to Provider search icon to look for providers that provide the service you have selected. (only providers that provide that service will be displayed for selection)
6. The Refer from Provider field defaults to your organization. If this referral is from another organization, you can click the search icon to find that organization
7. The Refer from User field defaults to the active user. You can click the search icon to find a different user.
8. Select the Status of the referral.
9. If desired, type Comments and select a Client Barrier.
10. Click Next.



11. On Step 2, if your organization has authorized a voucher for this service, click Voucher is Authorized.

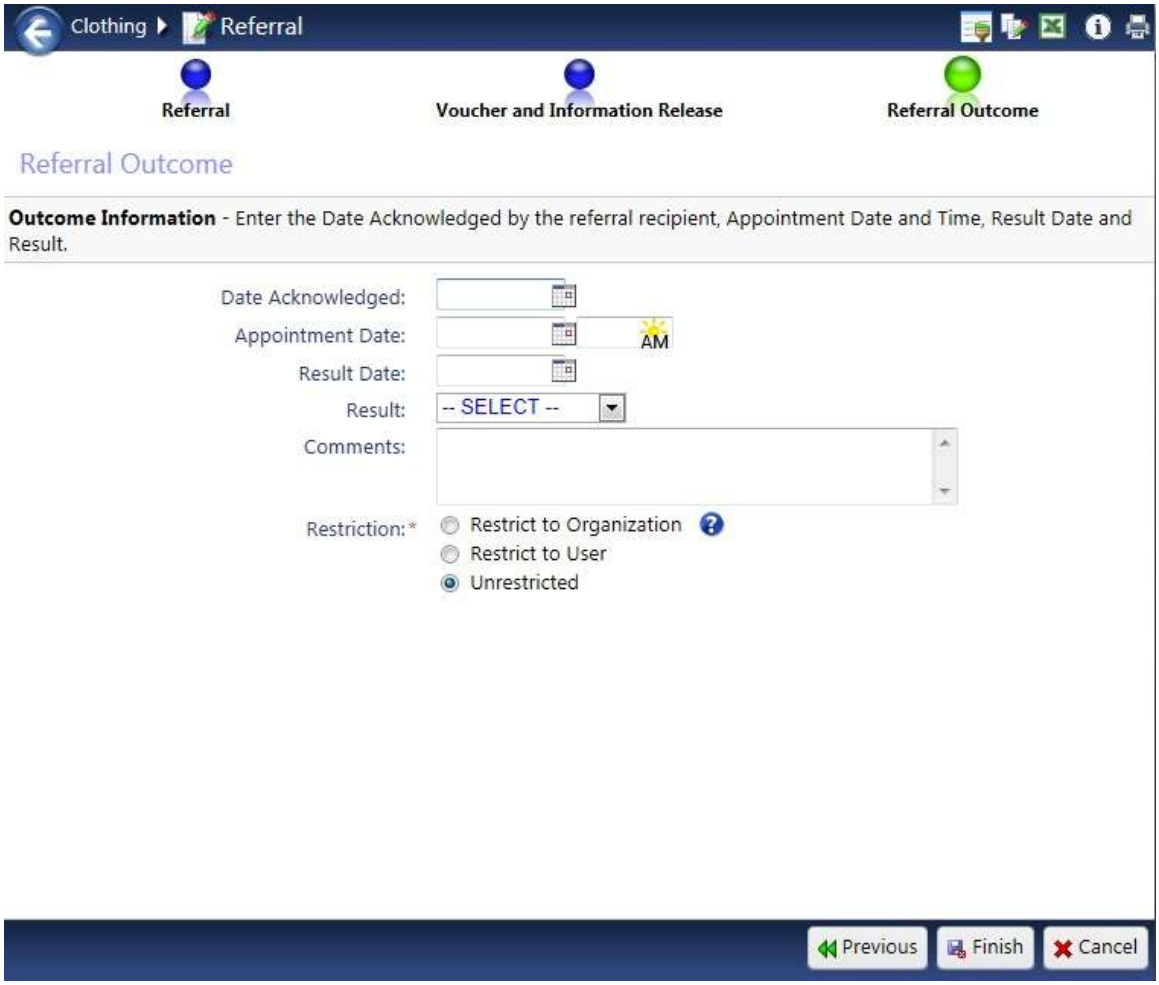
12. If the client has authorized that his/her information can be released to the selected provider, check Email Authorized. This will cause a window to open upon form completion that allows you to craft an email to send to this provider with information regarding the referral.

13. Click Next.



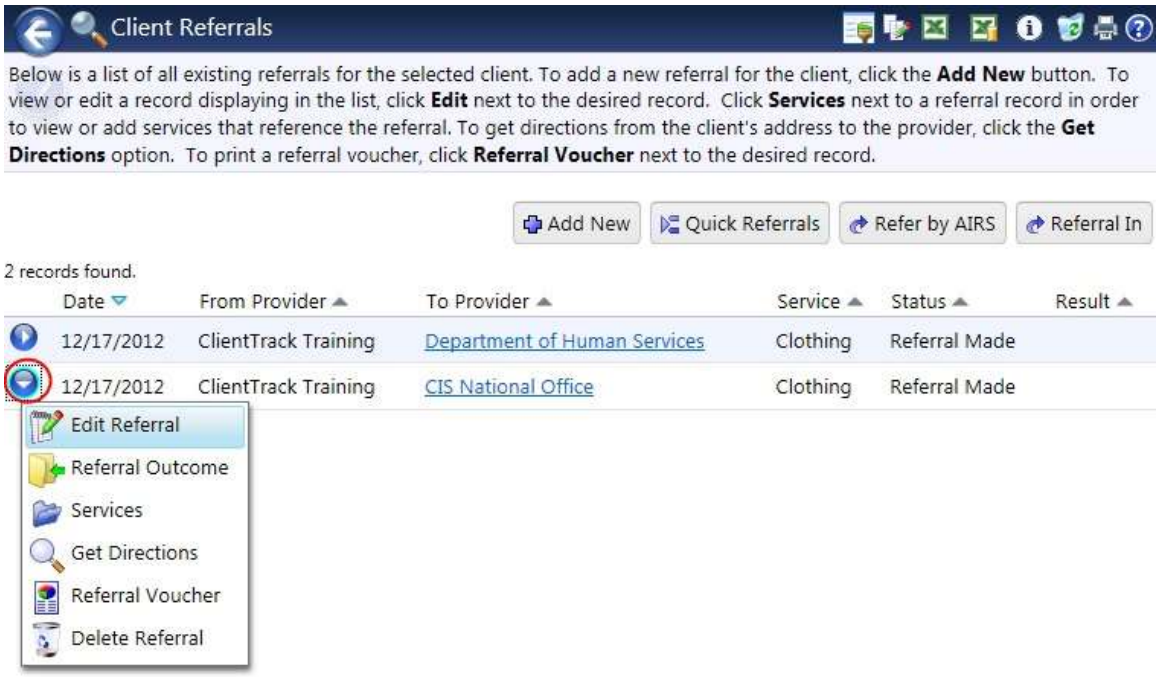
14. On Step 3, enter the Date Acknowledged by the referral recipient and any other desired information.

15. Click Finish.



Client Referral Actions

Once client referrals are recorded they will be displayed on the Client Referrals page. Clicking on the Action Menu will display a number of options. Referrals can be edited, deleted, and the referral voucher can be viewed and printed by clicking Referral Voucher. The Services option allows the user to view or add services that reference the referral.



Clicking Get Directions will display MapQuest to obtain directions to the provider.

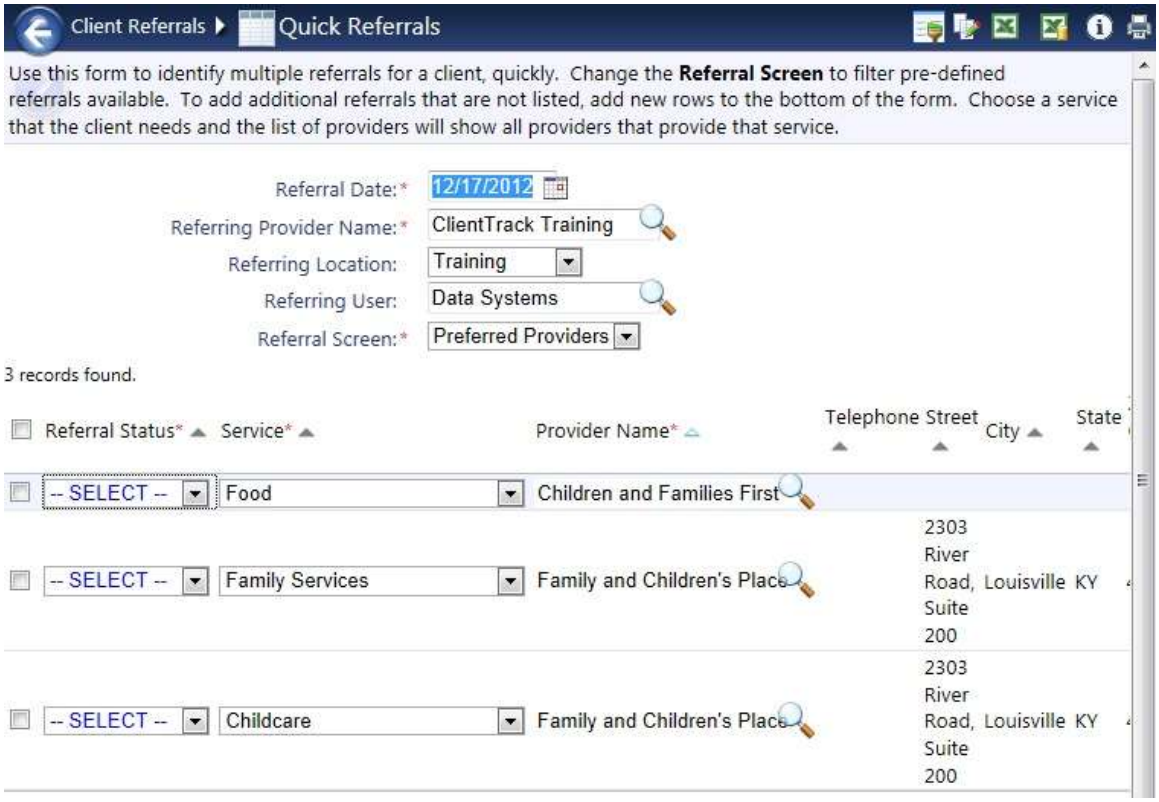
To record Quick Referrals:

1. On the Client Referrals page, click Quick Referrals.

2. On the Quick Referrals page, select a Screen from the dropdown menu to display corresponding Referral Services.

3. Click Refresh.

4. To display additional services, type a number in the Number of Additional Services box and click Refresh.

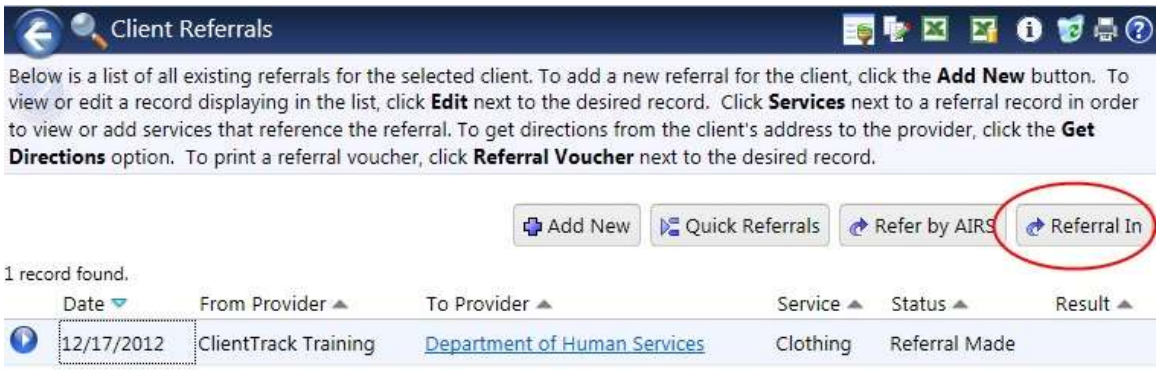


5. Select the desired Services by clicking the checkbox next to each service. To select all services listed, click the box next to Referral Service.

6. When finished recording referrals, click Finished.

To record a referral into your organization:

1. On the Client Referrals page, click Referral In.

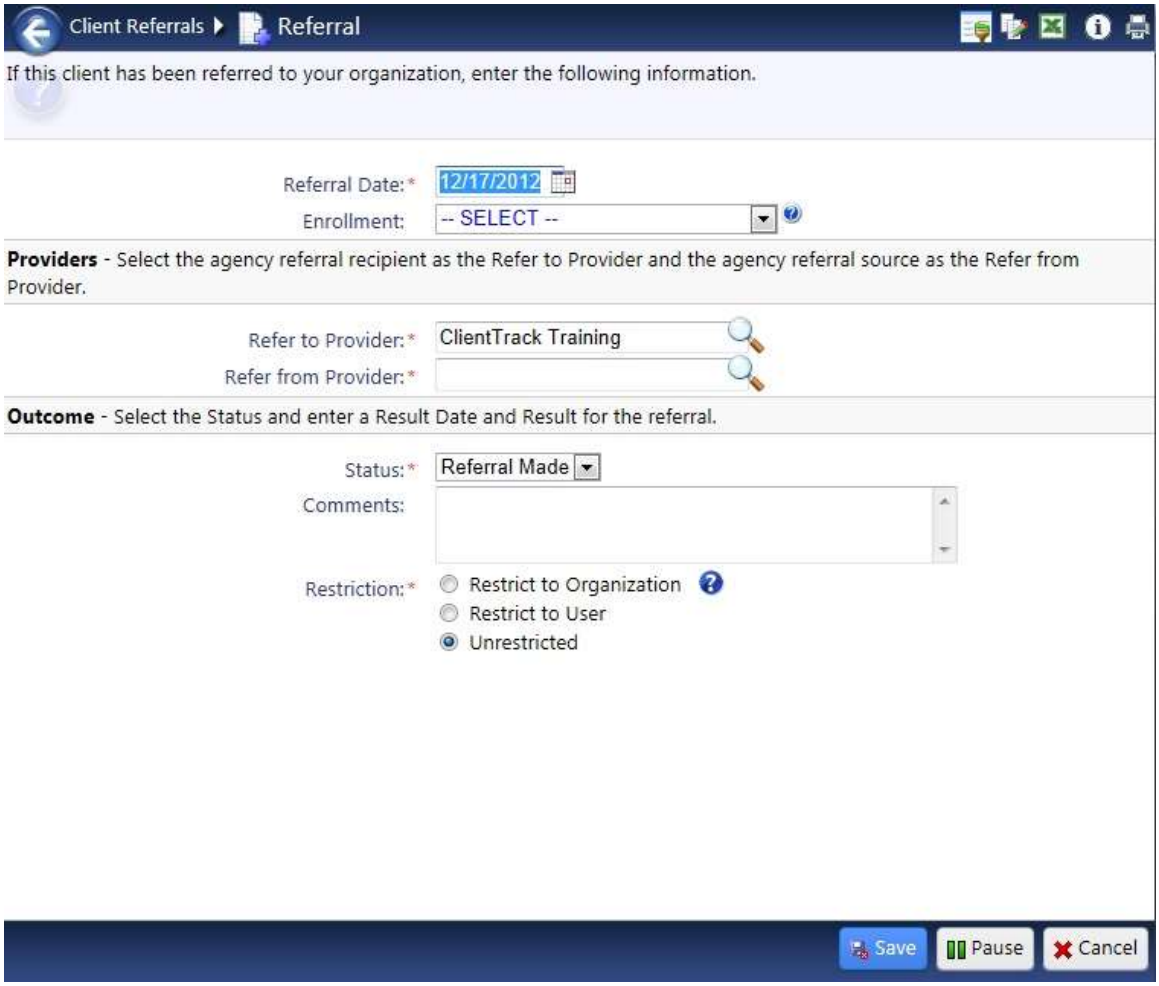


2. Since the client has been referred to your organization from another provider, Verify that your organization's name is in the Refer to Provider field on the Referral page.

3. Type the provider's name that referred the client to your organization in the Refer from Provider field.

4. Complete the additional information concerning the referral.

5. Click Save.



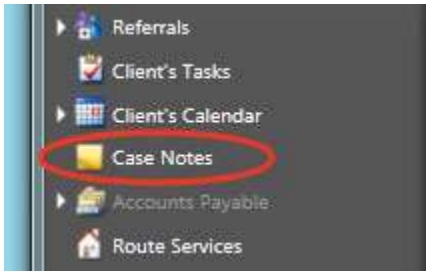
Case Notes

How are client case notes recorded in ClientTrack?

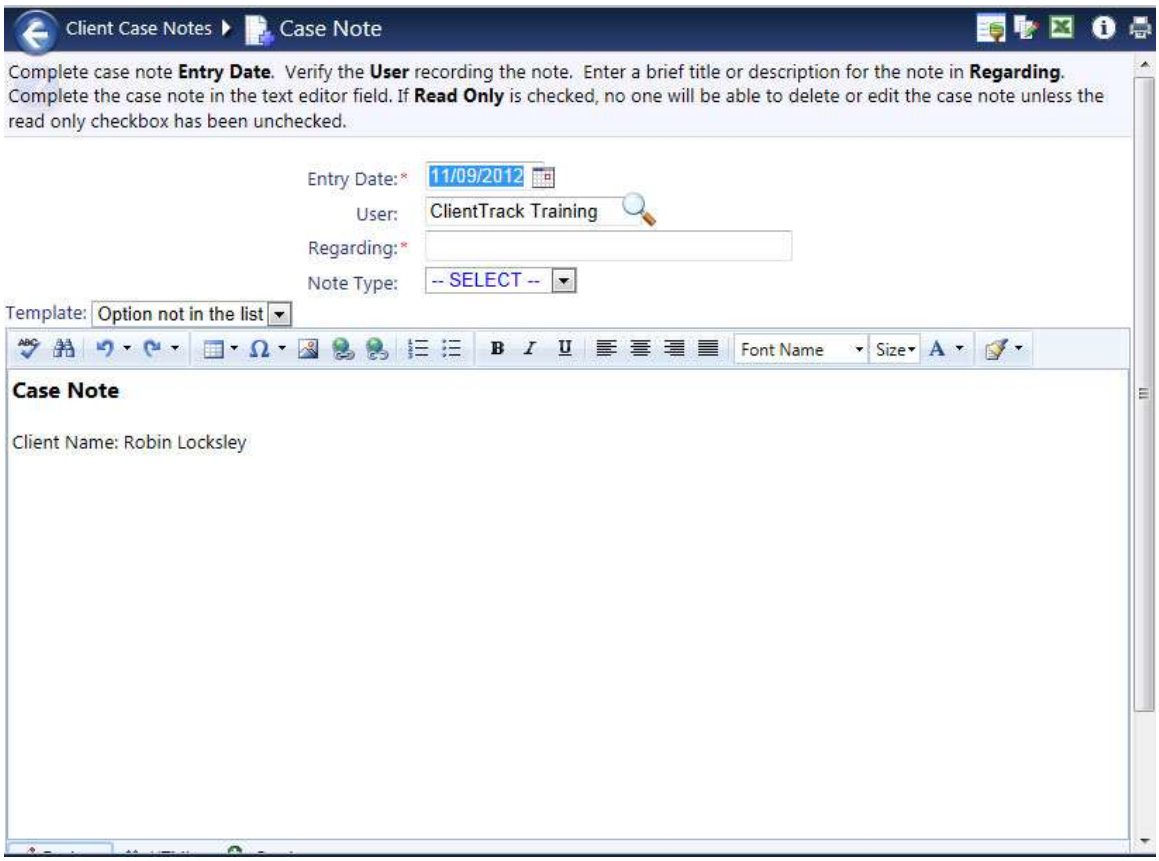
ClientTrack allows users to enter unlimited notes concerning clients' goals, actions, and progress.

To record client Case Notes in ClientTrack:

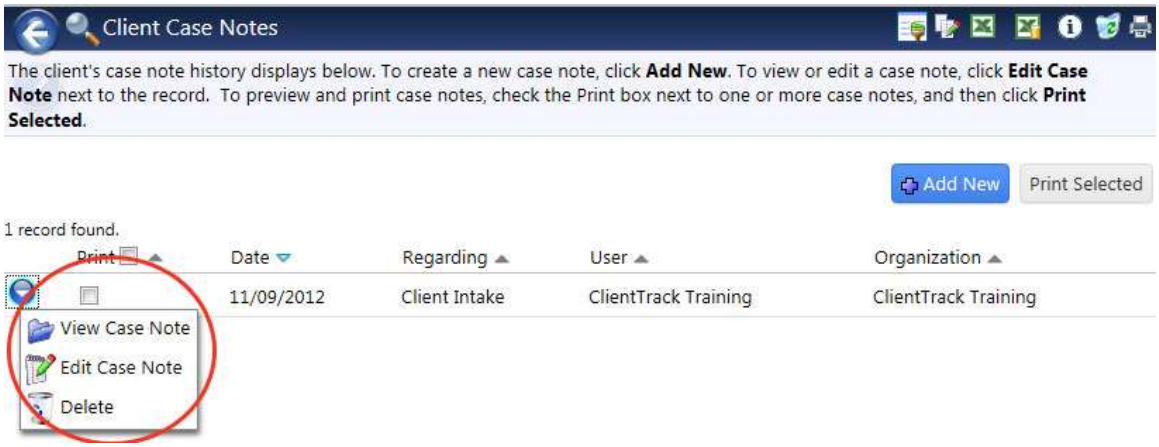
1. On Clients tab in the Case Management menu, select Case Notes, then click Add New.



2. On the Case Note page, you will see a Template dropdown menu. The templates displayed in the dropdown menu are controlled by your organization's system administrator. The selected template will change information displayed in the text entry section.
3. Select a Template from the dropdown menu.
4. ClientTrack automatically inputs the current date and the name of the user into the Entry Date and Case Manager fields. Verify that the information is correct.
5. Type the text in the text field. There are a variety of options in the text editor, including fonts, spell checking, and printing in the toolbar.
6. If Read Only is checked, no one will be able to delete or edit the case note until the read only checkbox has been unchecked.
7. Set a Restriction if desired.
8. Click Save.



Once a case note has been entered, it is displayed on the Client Case Notes page where you can edit, or delete it.



Additional Client Information

Client information includes data like Address History, Document Check, Interested Others, Family Members, Case Managers, Notifications, Alias History, Wait List, Bar List and Client Photo. Most of this is usually recorded under the Edit Client menu option.

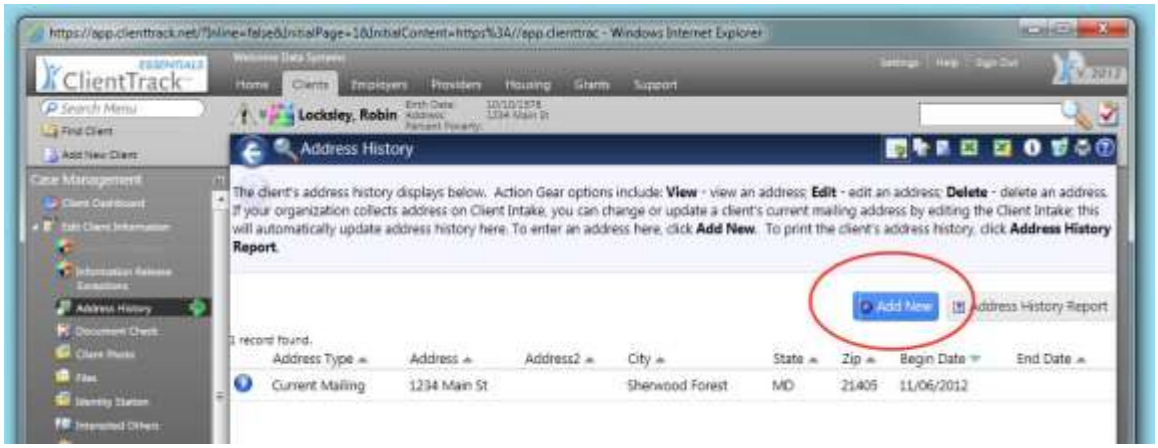
Note: The following section explains the most commonly used options in the Edit Client menu. If no entity has been selected, the Entity Toolbar will appear to be empty and some menu options may not be visible. Use the find functionality on each tab to select an entity.

Address History

The Address History section provides the current address and a list of previous addresses for the selected client. When you add a new client to ClientTrack, you will record an address in the basic information. If a client has additional addresses that may be useful to track, the addresses can be recorded in Address History. Any changes made to the client's address in the Edit Client menu will automatically be entered into the Address History.

To record address history:

1. Locate the client using Find Client.
2. On the Client tab, in the Case Management menu, click Edit Client then click Address History.
3. Click Add New.

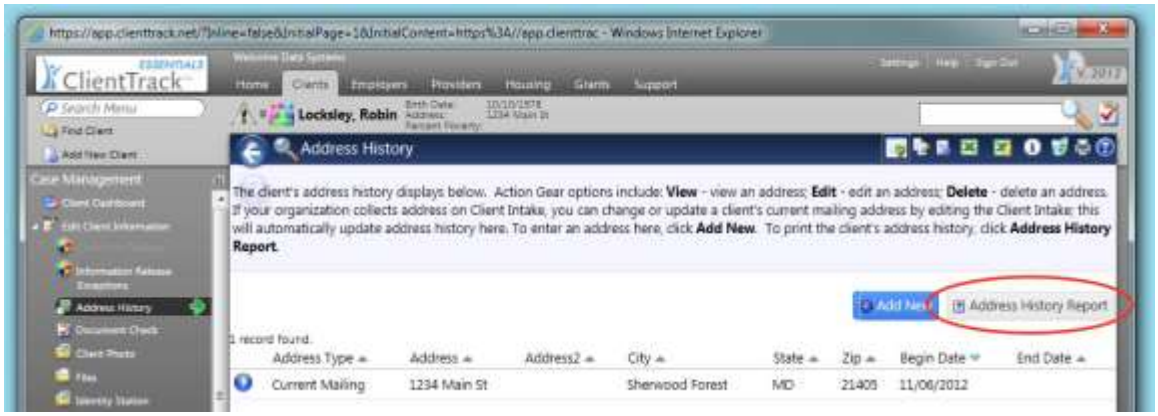


4. On the Client Address page, enter the Address Type and other required information.

5. Click Save.

Address History Report

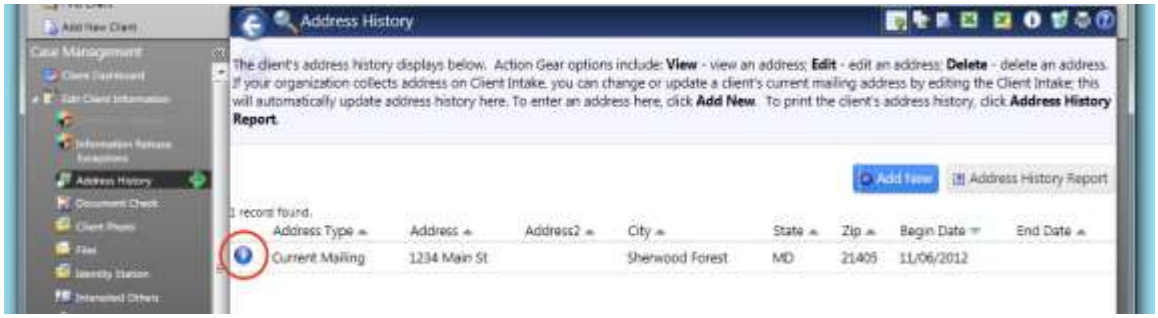
To create a report of the client's address history, on the Address History page, click Address History Report.



The report opens in a new window as illustrated below. If the report is longer than a single page, the navigation tools at the top of the page help the user move around in the document. In addition, the results may be displayed in a spread sheet or PDF file by clicking the appropriate buttons.

Once a client address has been entered, it will appear on the Address History page.

Clicking on the Action Menu next to the assessment displays user options to View, Edit, or Delete the record.



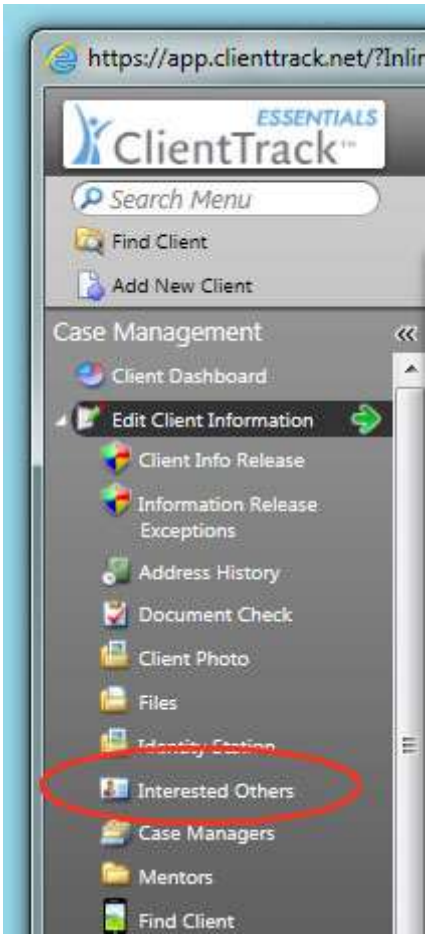
Interested Others

An interested other is an individual who has an interest or important association with the client and has not been recorded as a family member. Interested others include emergency contacts, physicians, counselors, or friends, etc.

Note: An interested other could also be an existing client.

To create an interested other:

1. On the Clients tab in the Case Management section, click Edit Client and then click Interested Others.



2. On the Interested Others page, click Add New.

3. On the second Interested Others page, select the Type/Description of the Interested Other from the dropdown menu.

4. Complete any additional information on the page.

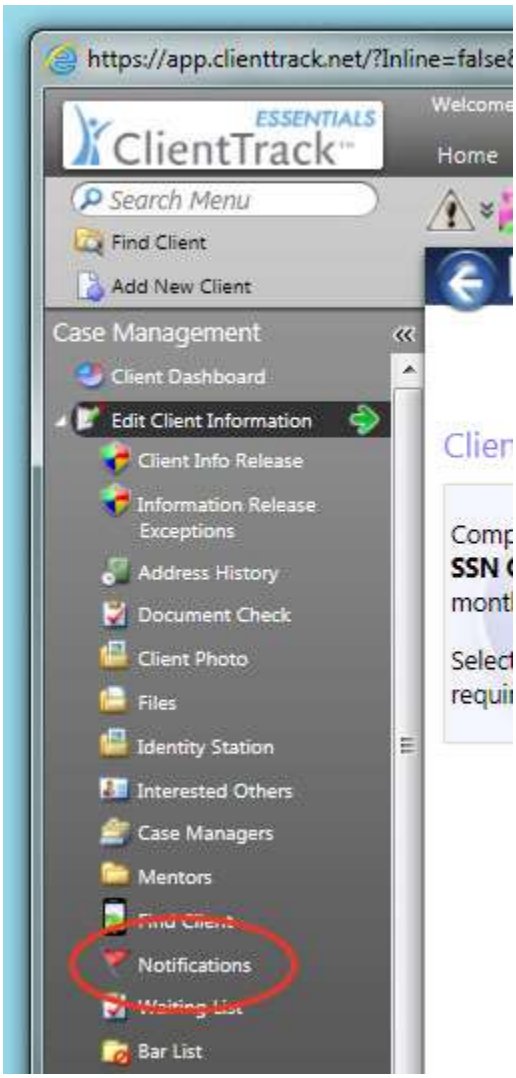
5. Click Save.

Notifications

Notifications allow users to enter alerts regarding a specific client. These alerts can be configured to immediately appear once you select a particular client.

To create a Notification:

1. On the Clients tab in the Case Management menu, click Edit Client and then click Notifications.



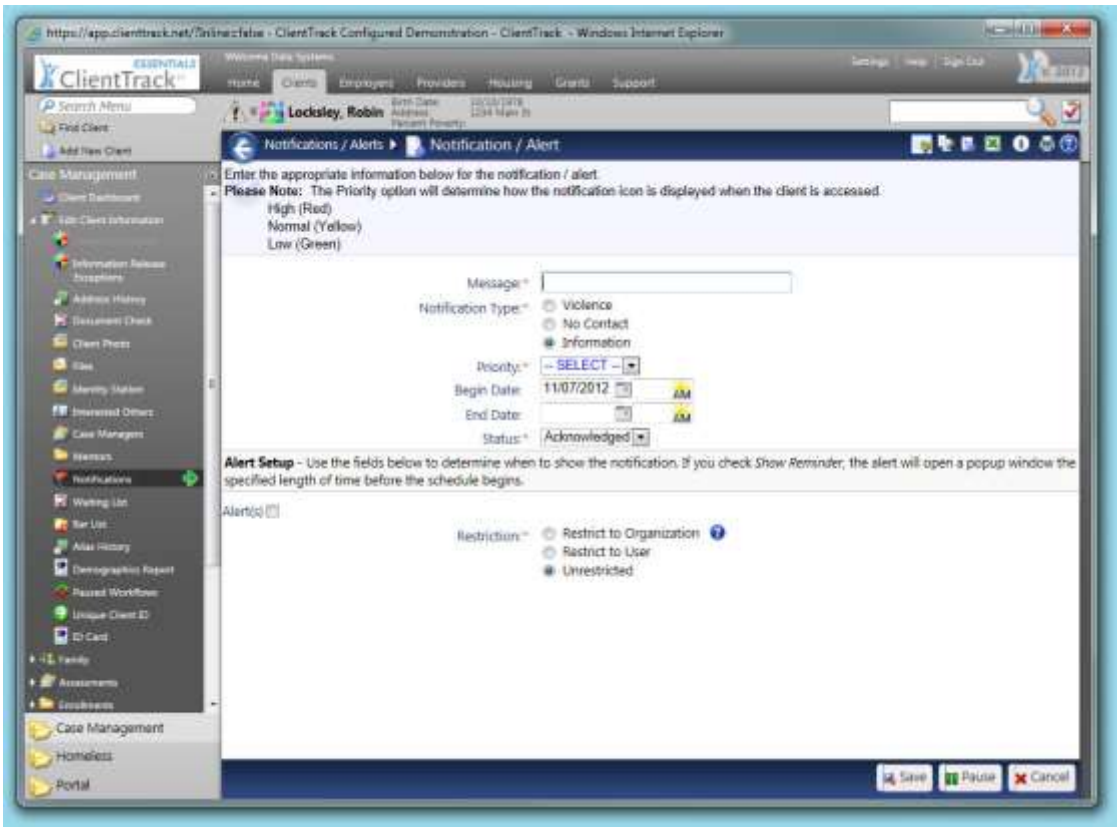
2. On the Notifications screen click Add New.

3. On the Client Notifications page, enter the notification information.

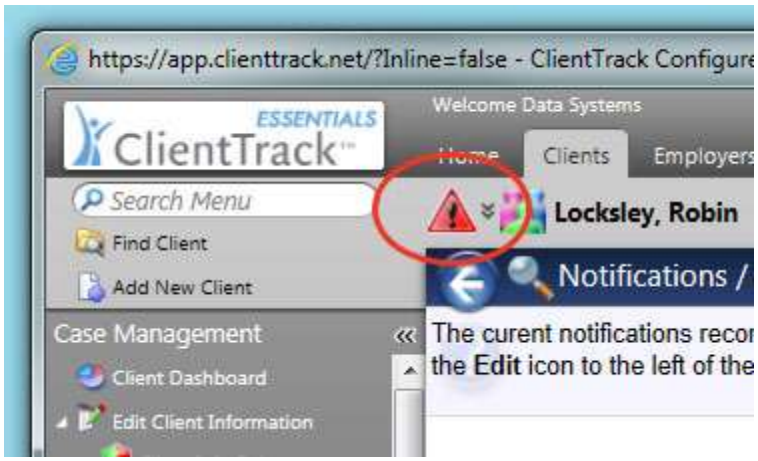
4. The Urgency Option selection determines the Notification icon that will appear when the client is accessed.

5. To create a popup alert for a task or for a schedule, check the Alert(s) checkbox and enter the date(s) and time(s) to show the alert.

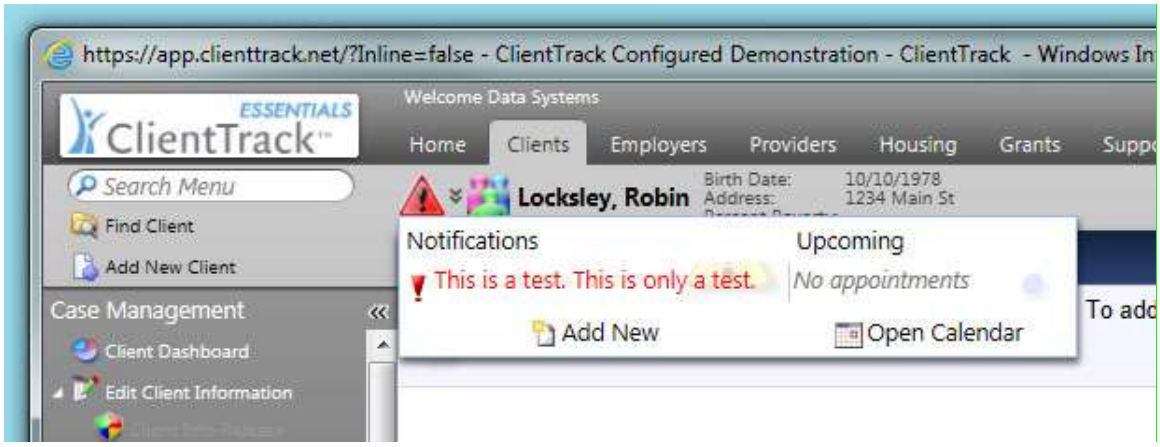
6. Click Save.



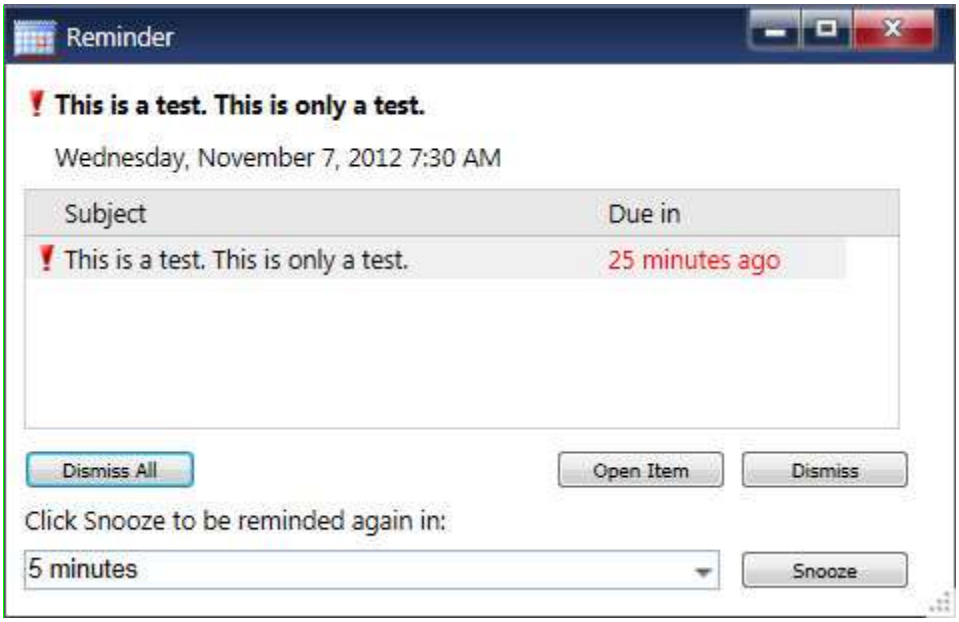
After you have entered in a notification, depending on the urgency, a red, yellow or green exclamation mark will show up next to the client's name. If there is more than one notification, the color representing the most urgent notification will be displayed.



Clicking on the exclamation mark will display a brief summary of the alerts.



The Notification popup page opens to display the notification information. You can modify the data, Snooze the alert, Dismiss the alert, or change the time in minutes that the popup window will be displayed.

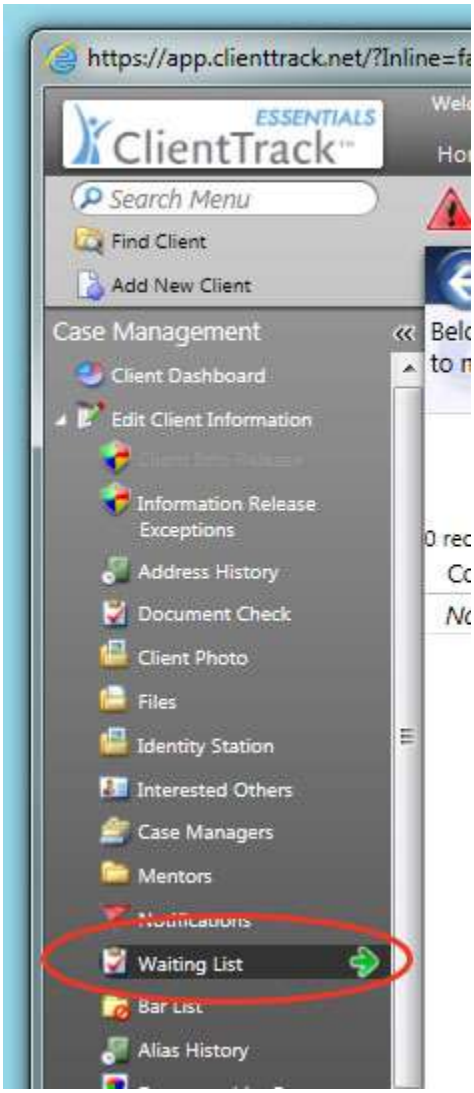


Wait List

The Client Wait list is a record of the referrals or facilities for which the client has been put on a waiting list. After clients are added to a waiting list, the provider assigned to the referral is able to access the list from the Wait List in the Provider Management area.

To access the Client Wait list:

On the Clients tab in the Case Management area, click Edit Client then click Wait List.



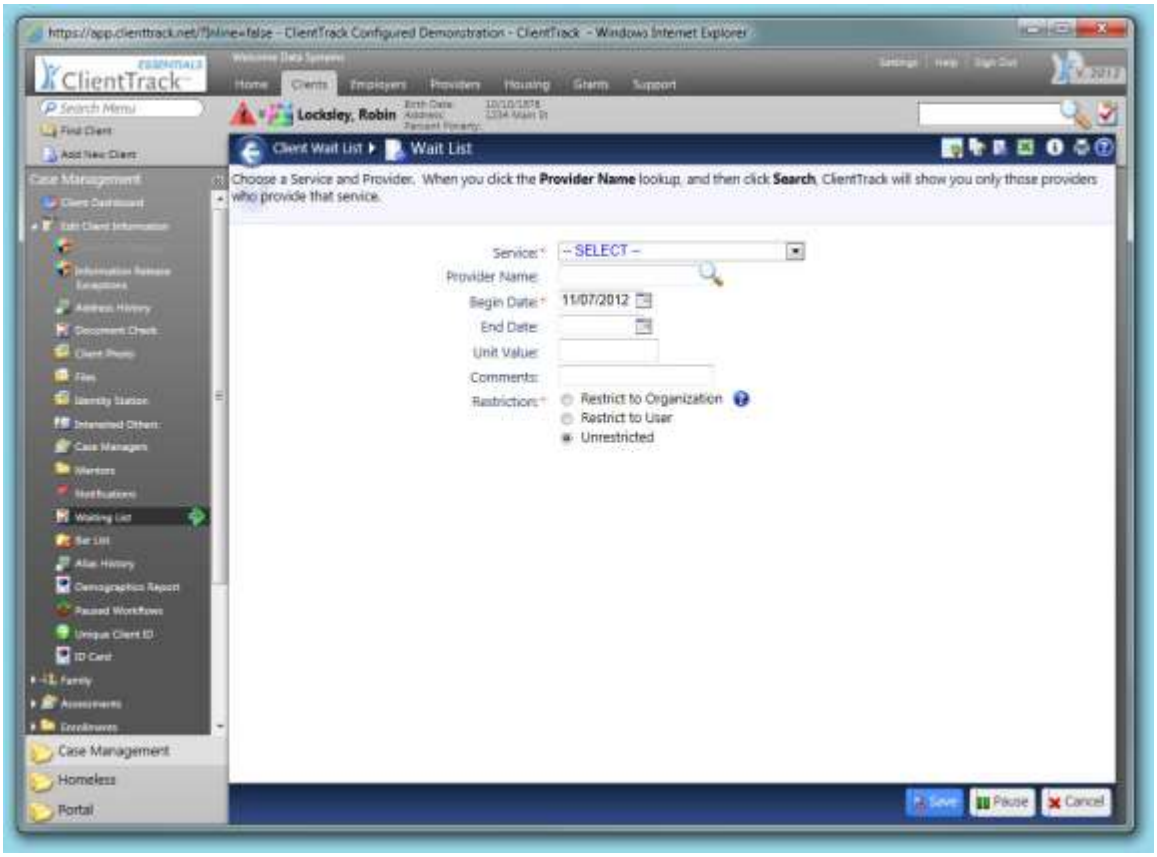
To add a referral or facility to a client Wait List:

1. On the Client Wait List page, click Add New.

2. Select a Service from the dropdown menu.

3. Enter any additional information.

4. Click Save.



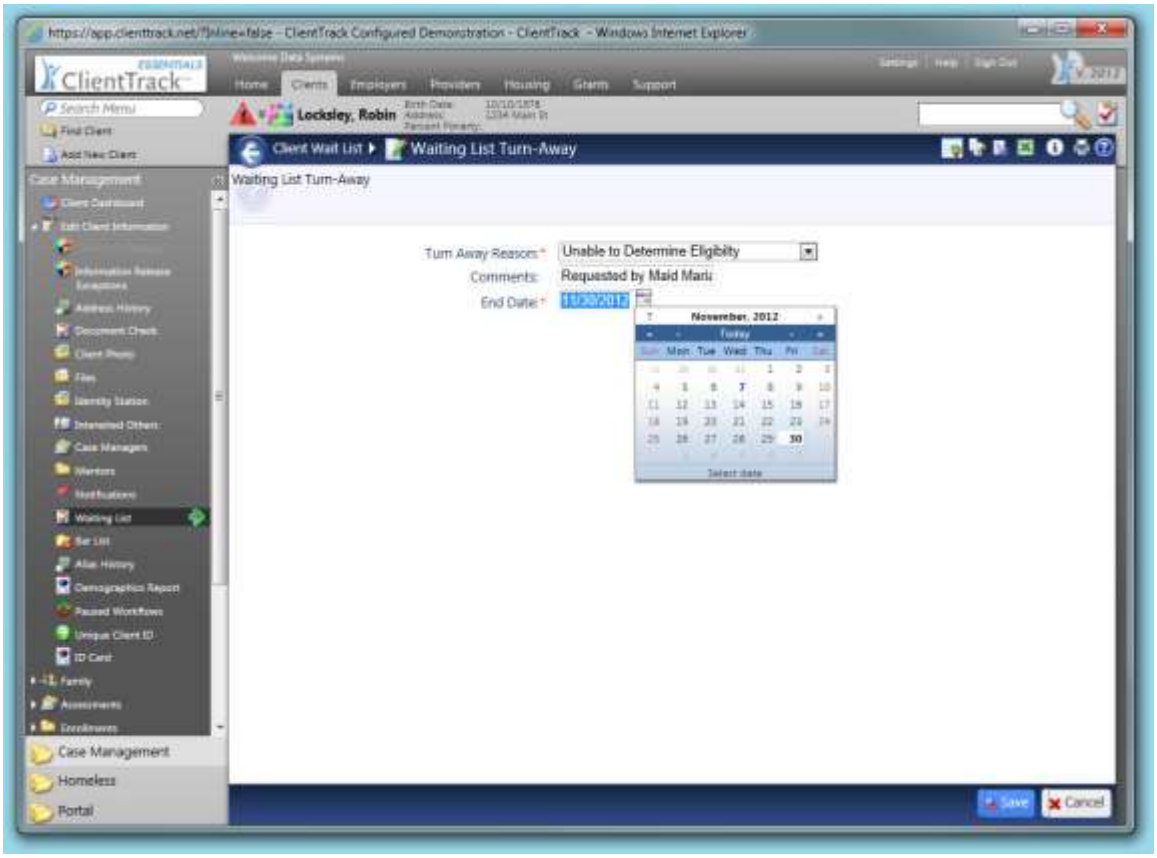
To record when a client has been turned away from a referral or facility on the Wait List:

1. On the Client Wait List page, click the Action Menu next to the appropriate item on the client's wait list.

2. Click Turn Away.

3. On the Waiting List Turn-Away page, enter the reason for the turn-away, any Comments, and an End Date.

4. Click Save.

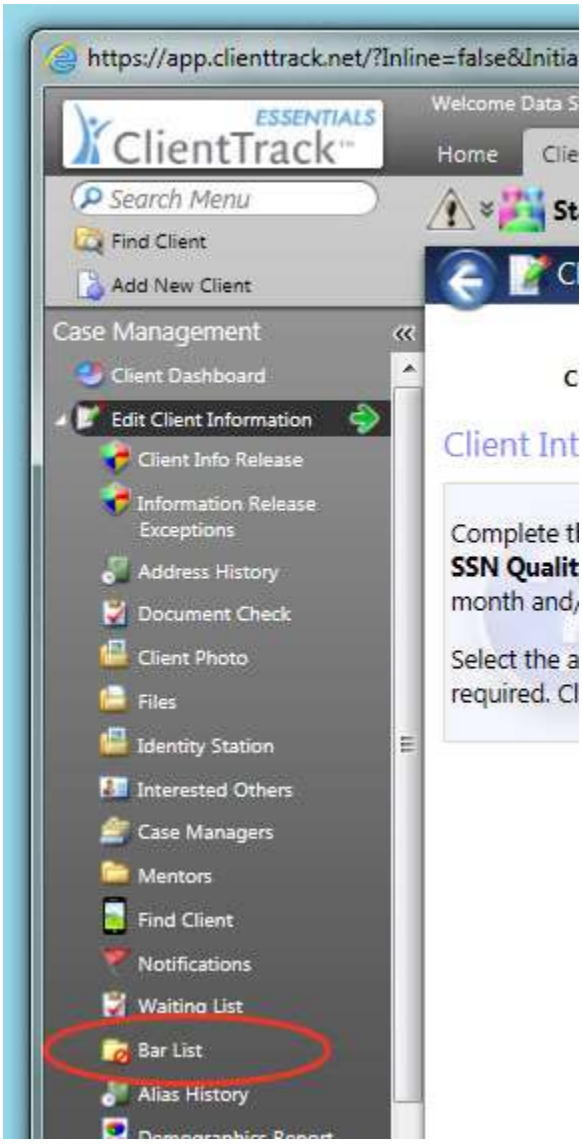


Bar List

The bar list is a record of all the services and the facilities from which this client has been barred. Clients may be barred for many different reasons. Once they have been barred from a service or facility, they will not be able to check in to the facility or receive the service.

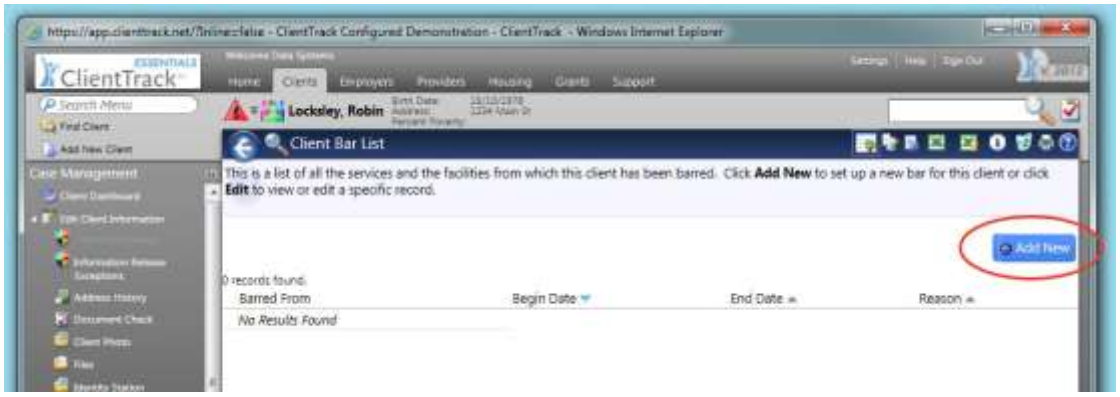
To access the client Bar List:

On the Clients tab in the Case Management area, click Edit Client then click Bar List.

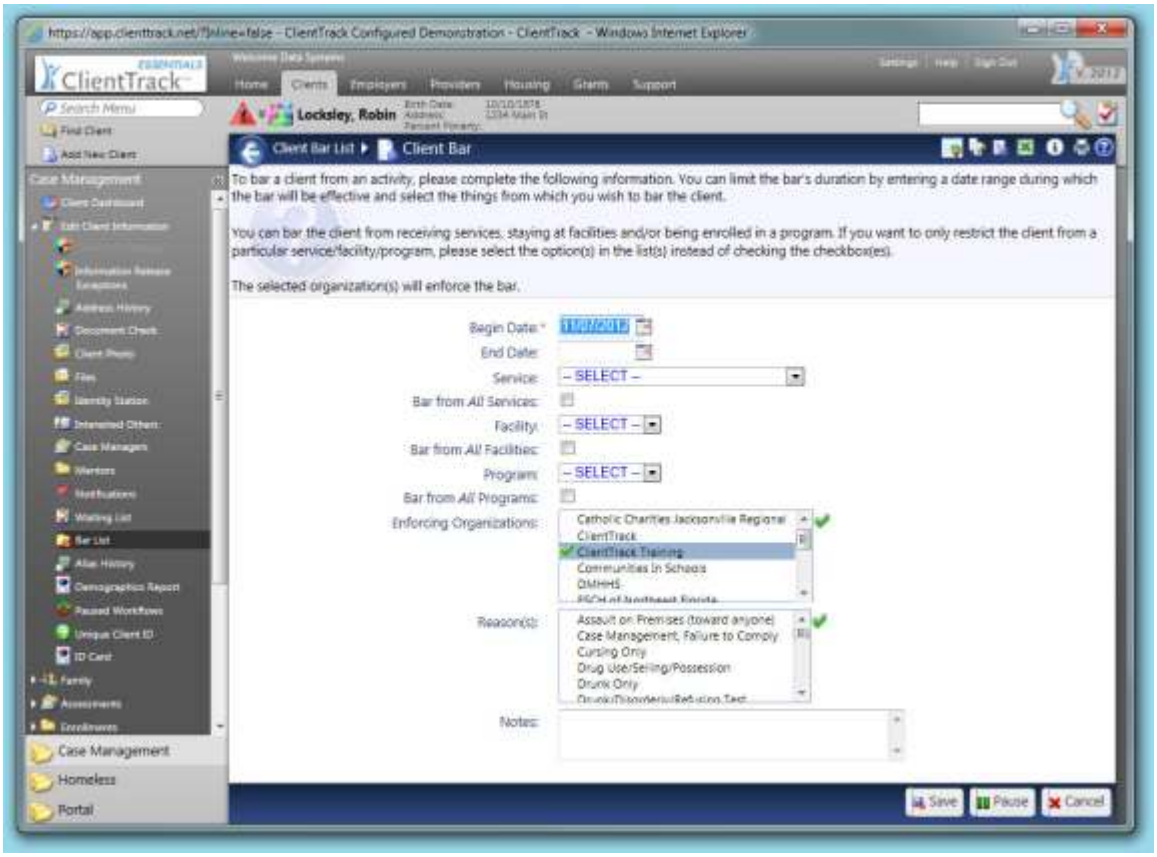


To add a client to the bar list:

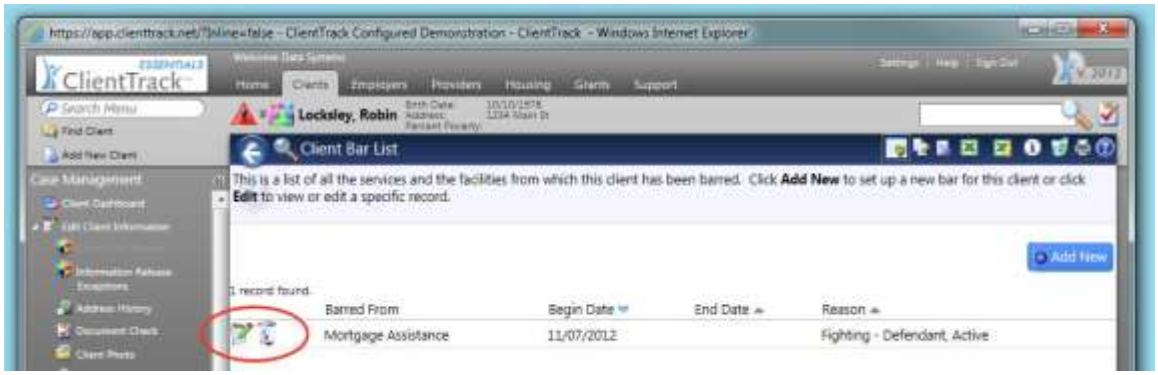
1. On the Client Bar List page, click Add New.



2. Enter a Begin Date.
3. If you wish to create a date range to bar the client, enter an End Date.
4. You have the option of barring a client from a single Service, Facility, or Program, or from all of these entities by checking the appropriate Bar From *All* checkbox.
5. Select the Organization(s) to enforce the bar.
6. Click Save.



After a client has been barred from a Service, Facility, or Program the Barred From items will be displayed on the client's Bar List Setup page. Items listed in the bar list may be edited or deleted by clicking on the Edit or Delete icon.

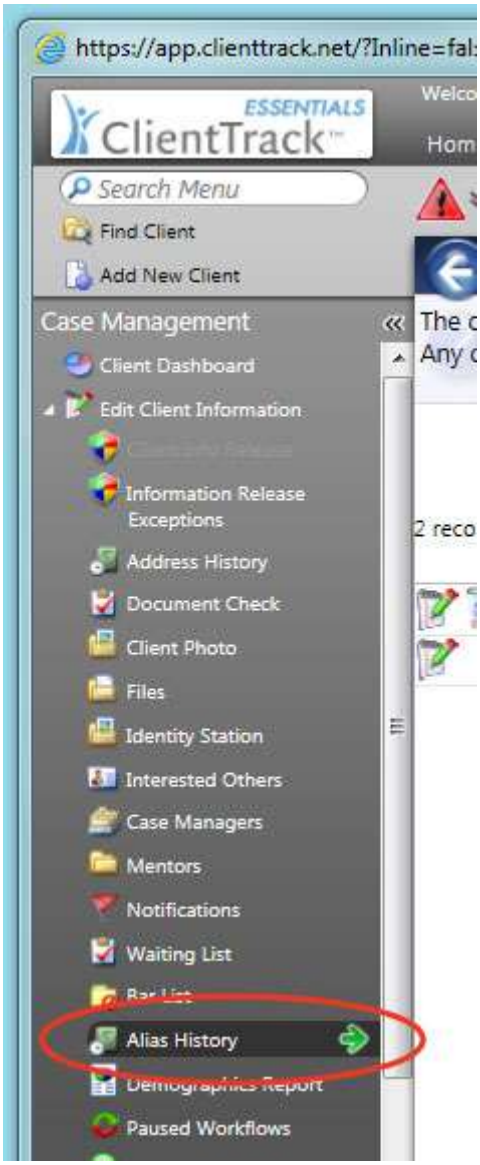


Aliases

An alias is any name a client may use to identify himself/herself. An alias is automatically created behind the scenes when the user edits the client's name, but additional aliases can also be added manually.

To add a client Alias:

1. On the Clients tab in the Case Management section, click Edit Client and then click Aliases.

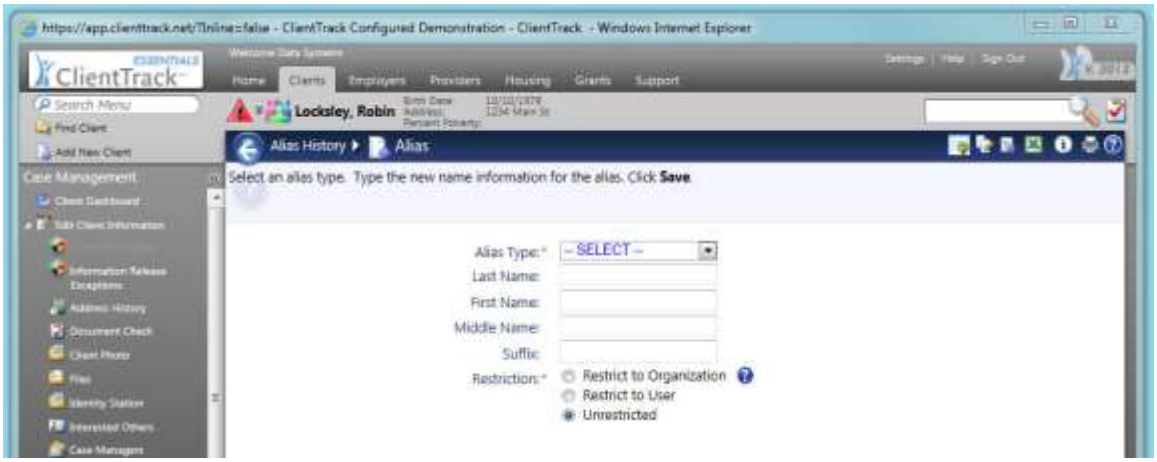


2. On the Alias History page, click Add New.

3. On the Client Alias page, fill in the new client alias information.

4. If you wish to restrict access to the new client alias, select the appropriate Restriction radio button.

5. Click Save.



To edit an existing alias:

1. On the Alias History page, next to the name you would like to edit, click the Edit icon.

2. On the Client Alias page, make the necessary changes.

3. Click Save.

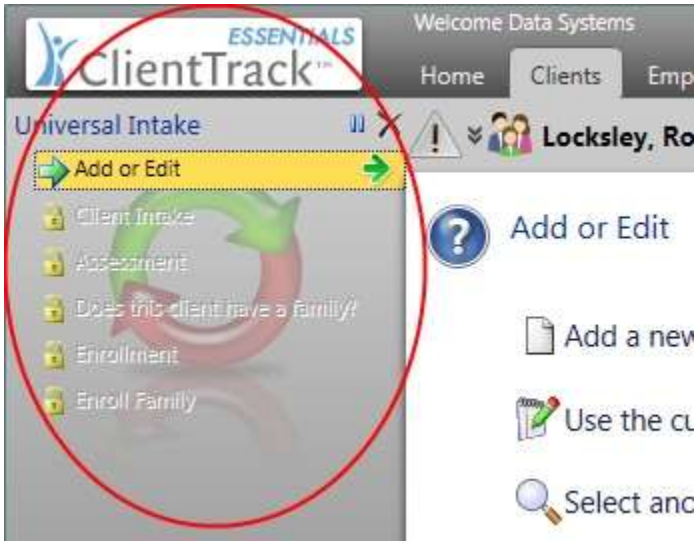
Workflows

Overview

The workflow process is a systematic method of capturing information that steps the user through a series of required entries. Workflows are created by the system administrator to make data entry an easy and organized procedure.

To begin a workflow:

Click on the workflow icon to begin the process. When a Workflow begins, the Workflow name along with a group of status icons and navigation buttons appear in the upper left navigation panel.



Workflow Navigation Buttons:

- -Delete Workflow
- -Stop Workflow
- -Pause Workflow

Workflow Status Icons:

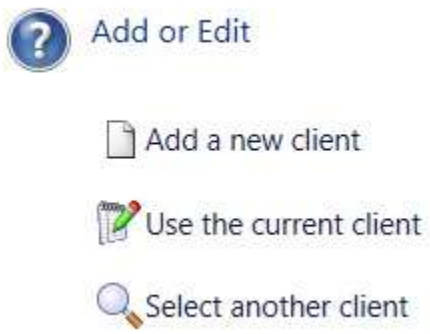
- - Workflow Step Completed.
- -Current Workflow Step

-Workflow Step Locked

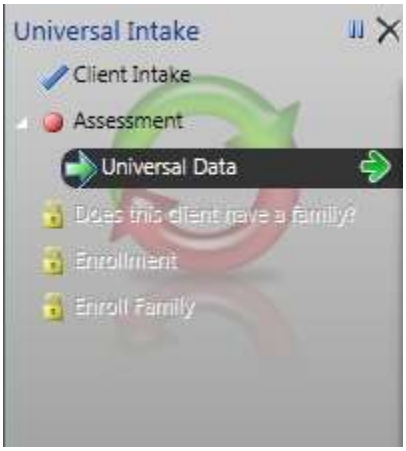
- Optional Step

- Required Step

After the Workflow begins, the forms and questions appear in the main form area.



As the user proceeds through the Workflow, the status icons will change to indicate progress.



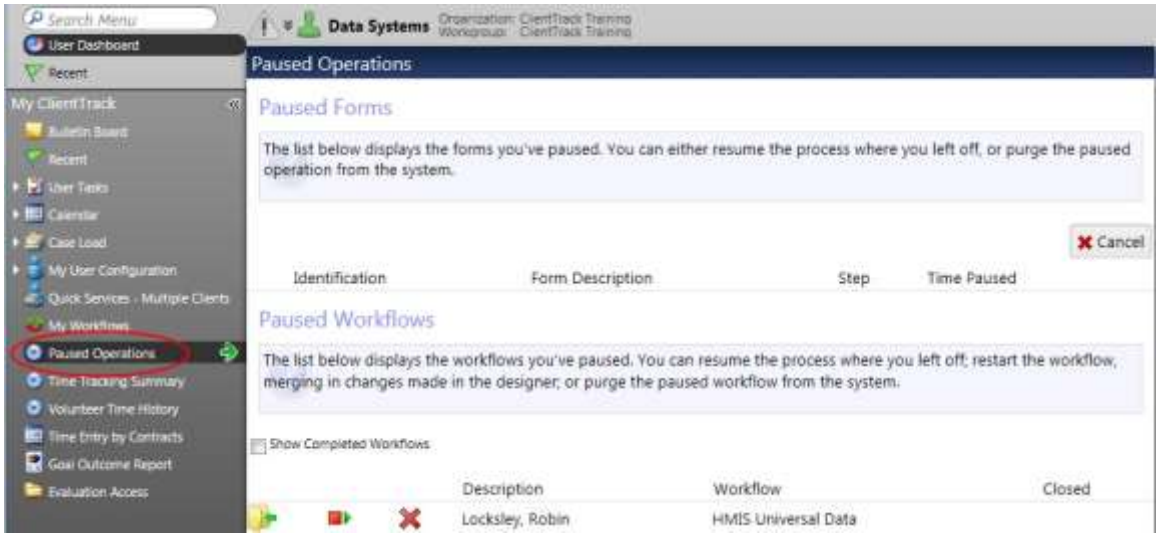
To pause a Workflow and return at a later time, click the Pause button. To cancel the Workflow and discard any unsaved data, click the delete button.

Note: Data is saved as each form step is completed.

Paused workflows may be resumed at any time.

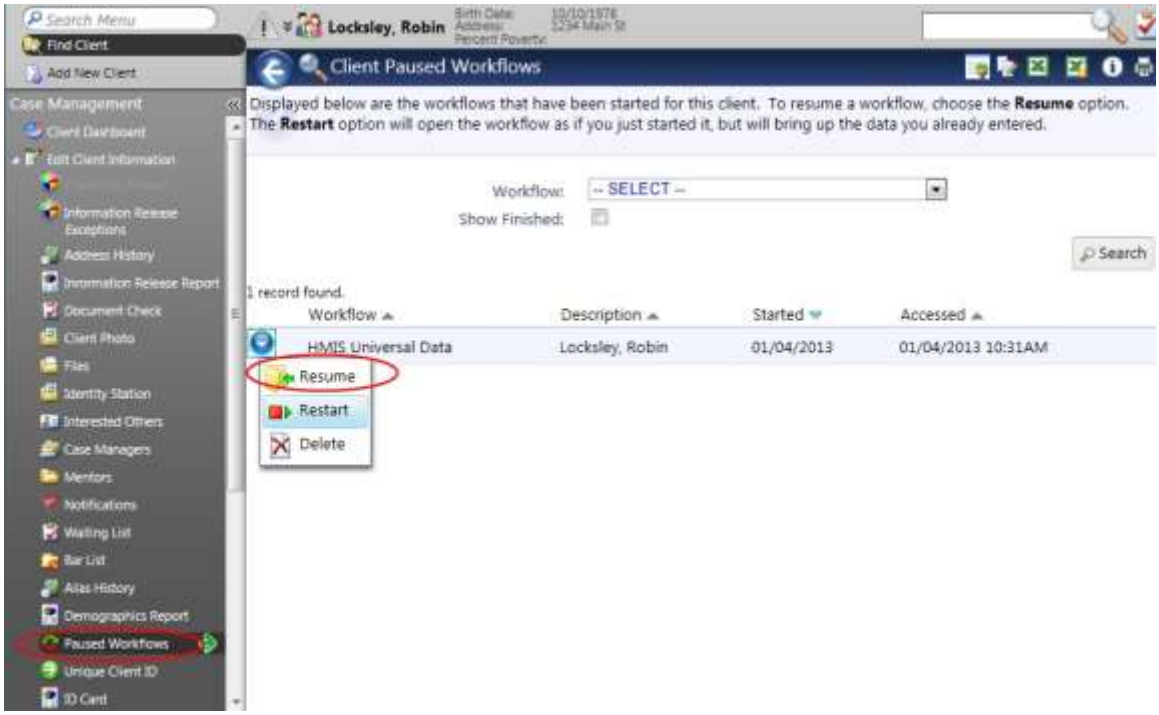
To access your paused operations

On the Home tab in the My ClientTrack section, click Paused Operations.



To Access a Client's Paused Workflows

In the Clients Tab under the Edit Client Information menu option, click Paused Workflows. From here you can use the action menu to resume a workflow where it was paused, restart a workflow from the beginning, or delete a workflow.

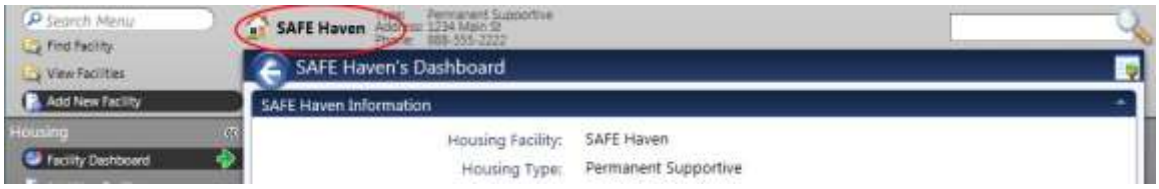


Note: Any user can manage a client's workflow from the Clients tab, regardless of whether they started the workflow or another user did.

Housing Management

Shelter and Transitional Housing processes are located on the Housing tab of ClientTrack. The Housing Management menus enable users to check availability, view current residents, and check clients into housing facilities. Housing reports are available in the Housing Reports menu option.

There are various methods to access housing information in ClientTrack. When an individual facility has been selected, it is displayed in the entity area, the same as a client.



To locate a housing facility in ClientTrack:

1. On the Housing tab, in the top left navigation panel, click Find Facility.

2. The Find Facility function operates the same as Find Client. Type any known data and click Search.

3. The View Facilities function will display a list of all facilities.

4. The selected facility information will be displayed on the Facility Dashboard Info page, and the facility will be listed as the current entity. The menu items in the left navigation panel refer to the facility listed as the entity.

ClientTrack uses the following icons to represent different types of housing facilities:

 - Shelter

 - Transitional

 - Program Unit

- Permanent

Checking Bed Availability

When you are assessing client needs, you may want to do quick search to check for bed availability on a specific date.

To check bed availability:

1. On the Housing tab in the Housing Options menu, click View Facilities.

2. The View Facilities page displays all the housing facilities available to members of your organization along with the occupancy of the facility for a specific Date. Each facility is listed with the number of available units as well as a brief description under the facility name.

3. To view availability for a different date, select a new Date and click Update.

4. Holding the mouse cursor over a facility will also display availability in an information balloon above the facility's icon.

5. Clicking on the facility name will make that facility the current entity and display additional details, including a breakdown of individual units with information such as the type of rooms in the facility and the ages and gender of clients that may occupy them.

Note: In order to check a client into a room, the client must meet any restrictions in the room designators, such as Male, Female, Adult, or Youth. When a room has a Family designation, a child of any gender can check into that room, regardless of any other gender restrictions.

Reservations in Housing Management

To make a bed reservation:

1. On the Housing tab in the Case Management menu, do either of the following:
    a. Click View Facilities
    b. Click New Reservation/Check In
2. Clicking on View Facilities will display the Housing Facilities page. Click Reservation.

3. Clicking on New Reservation/Check In will display the rooms/apartments for the current facility entity. Click Reservation for the specific room/apartment where you want to reserve a bed for the client.

4. On the Housing Reservation page, verify the Facility in the dropdown menu, and then select a Room and a Bed.

5. The Availability of the facility is automatically displayed. Enter a Reservation Begin Date and End Date.

6. Use the Search icon to find the client you wish to assign a reservation. ClientTrack will fill in the client's personal information automatically.

Note: The Housing Management menu is not client-specific, but facility-specific. The active client in the Case Management section will not be the default client in Housing Management. The user must select the client in the Housing Management section in order to create a reservation for that specific client.

Checking in Clients

To check in a client:

1. On the Housing tab in the Housing Options menu, do either of the following:

    a. Click View Facilities

    b. Click New Reservation/Check In

2. Clicking on View Facilities or Check Availability will display the Housing Facilities page. Click Check In.

3. Clicking on New Reservation/Check In will display the rooms/apartments for the current facility entity. Click Check In for the specific room/apartment where you want to check in the client.

4. If the facility is a shelter, the Shelter Check In page will be displayed. Verify the Facility in the dropdown menu.

5. If desired, select a specific Room and Bed. These items may be selected later.

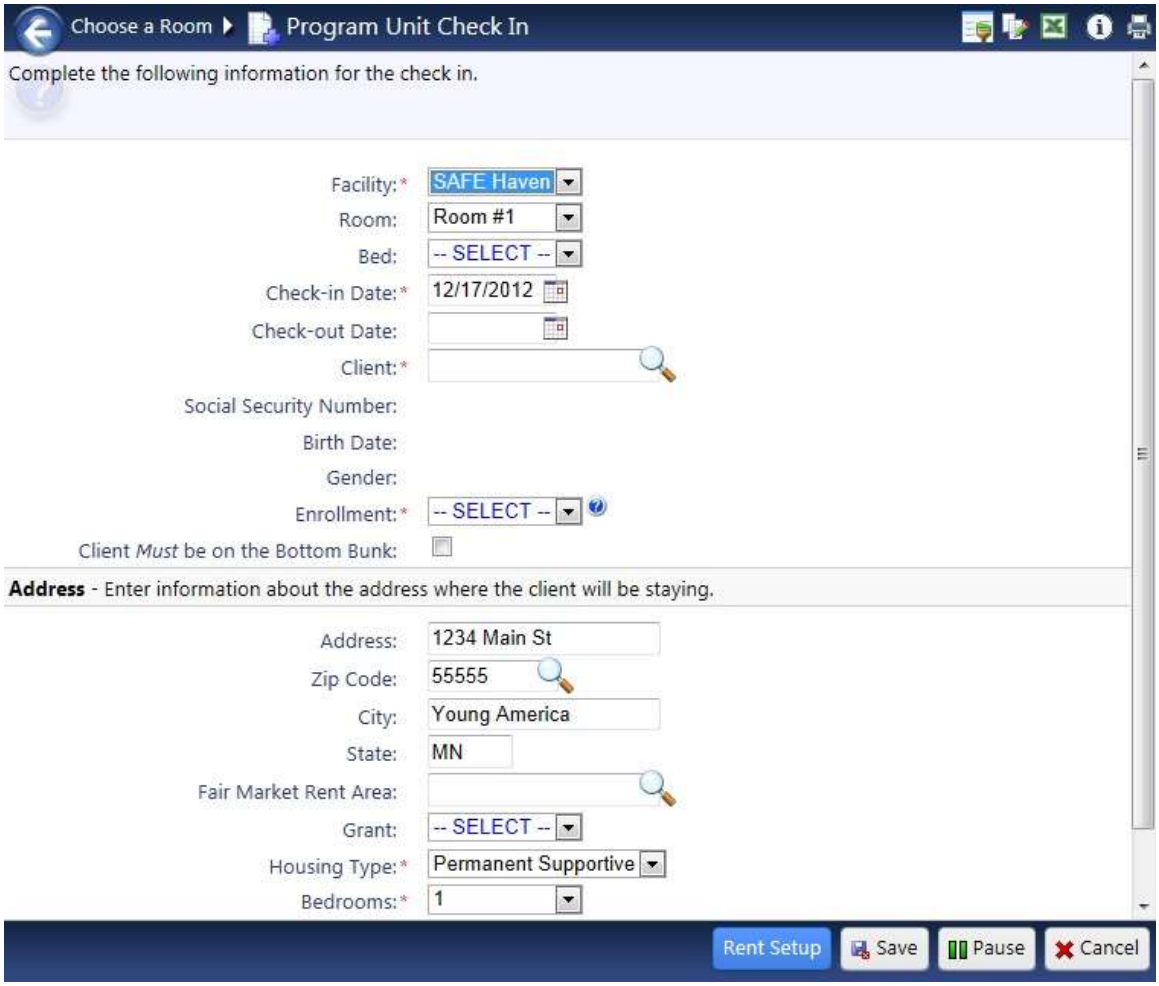
6. Select a Check-in Date and, if desired, a Check-out Date.

7. If you wish to assign the client a Chore, such as mopping the floors or removing the trash, select the chore in the dropdown menu.

8. To assign a Storage/Locker at the particular facility, use the Find icon to locate available resources and assign one to the client.

9. If the client must have a Bottom Bunk, check the box on the page.

10. Click Save.



11. If the client has not been assigned a bed, the Rooms in the facility page will display and the client's name and icon will appear at the top of the page. Click the name of the room where you would like to assign the client a bed.

The following icons appear in rooms:

 - Available

Occupied Beds

 - Female

 - Male

12. The client's icon will appear under Occupants without a bed assignment. Hold the mouse cursor over the icon and client information will be displayed. Then hold down the left mouse button and drag the icon to a bed.

13. The client's icon will then move to the bed. Holding the cursor over the icon will display client information.

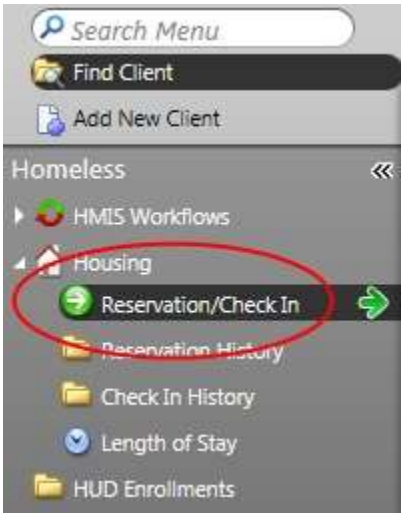
Note: If a client's record is restricted to the organization that created the record, the client's information will be blocked to other organizations authorized to view bed availability.

Client Entity Reservations and Check In

Client housing reservations can also be made in the Clients tab. Reservations made using this method will automatically be tied to the current client entity.

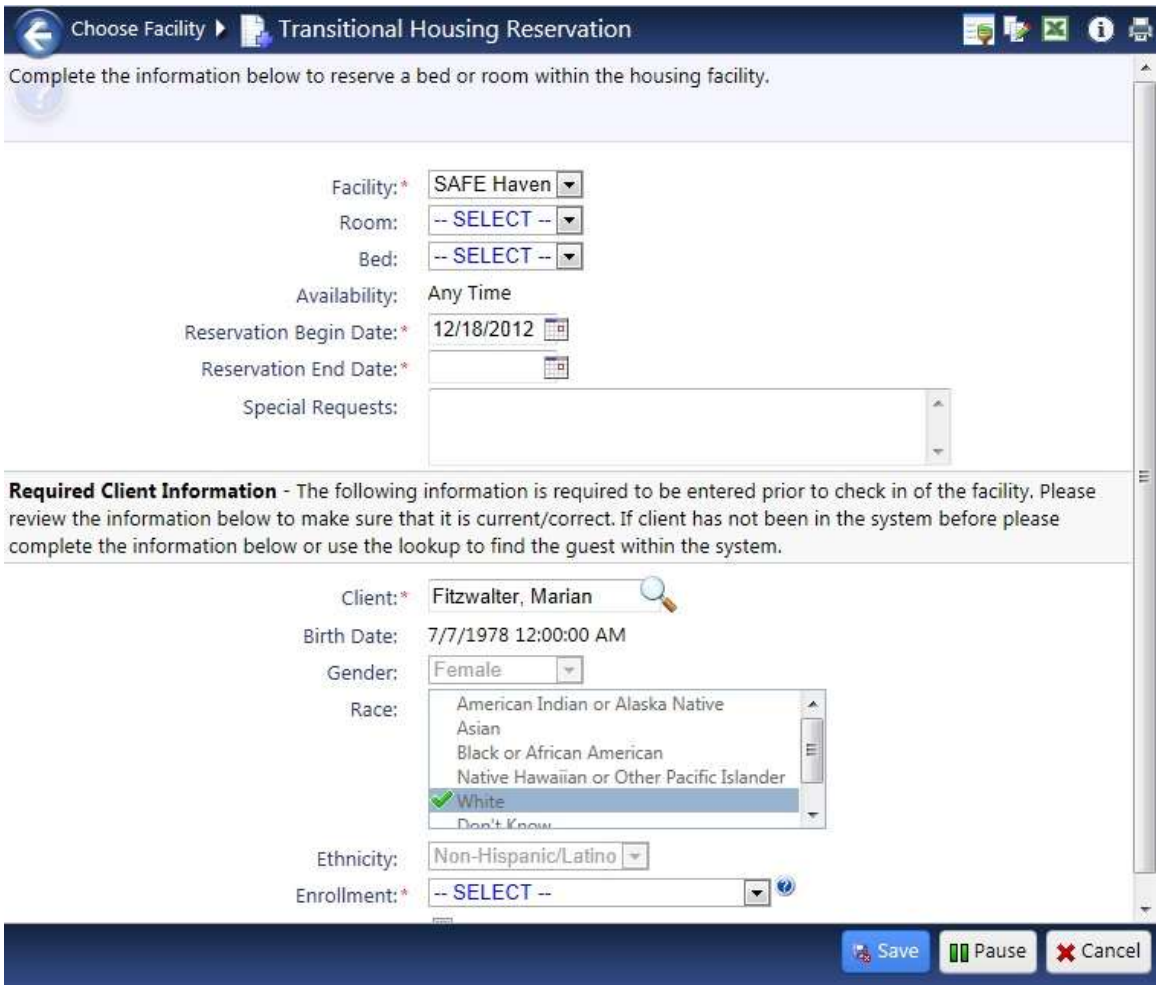
To make a reservation for the current client entity:

1. On the Clients tab in the Housing menu, click Reservation/Check In. The reservation will be referenced to the current client entity.



2. The Housing Facilities page will then be displayed with the active client's name displayed next to an icon. Click on Reservation in the facility where you would like to make a reservation.

3. The Housing Reservation page will then be displayed with the current client's information already entered. Follow the procedures listed above to reserve a bed for the client. The check in procedure is also the same.



Using the ClientTrack Calendar

ClientTrack has two calendar perspectives: the Client Calendar and the User Calendar. The User and Client calendars provide configuration options and schedules relative to the current user or the selected client. Each calendar view can be switched to a day planner to view schedules on an hourly basis for any day of the month.

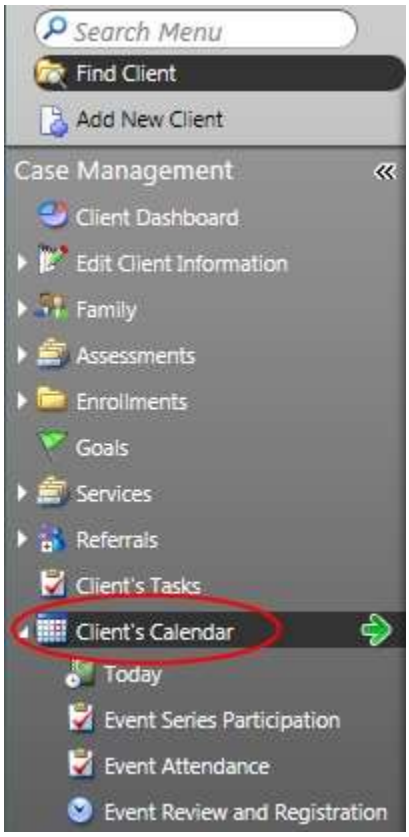
User and Client Calendars

The process to schedule events and navigate in the User Calendar and the Client Calendar are essentially the same. The following describes the Client Calendar.

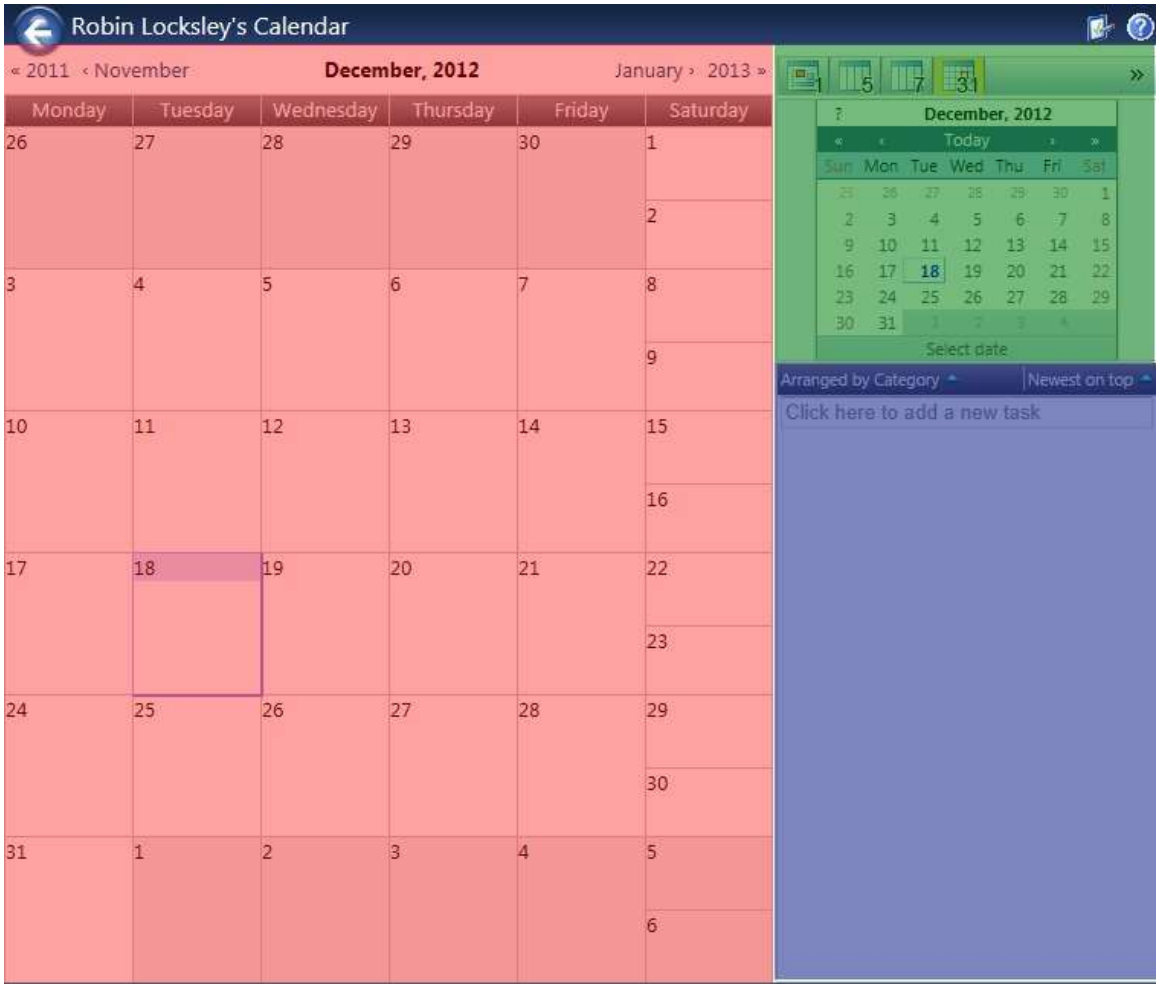
To access the Client's Calendar:

On the Clients tab, click Client's Calendar.

Note: The User Calendar can be accessed on the Home tab by clicking Calendar in the My ClientTrack menu group. All functionality described below is the same for either calendar.



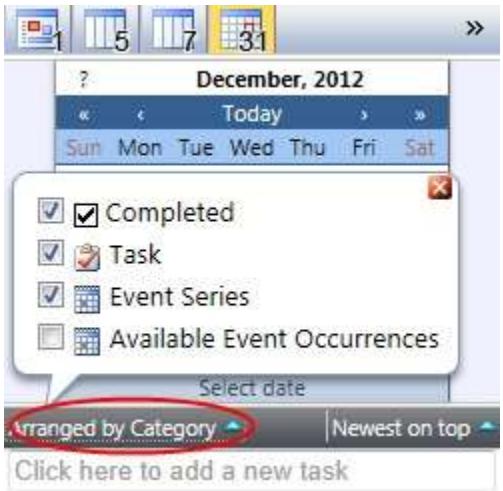
The calendar view has three main areas, the **Miniature Calendar**, the **Main Screen**, and the **Task Panel**.



Calendar Navigation:

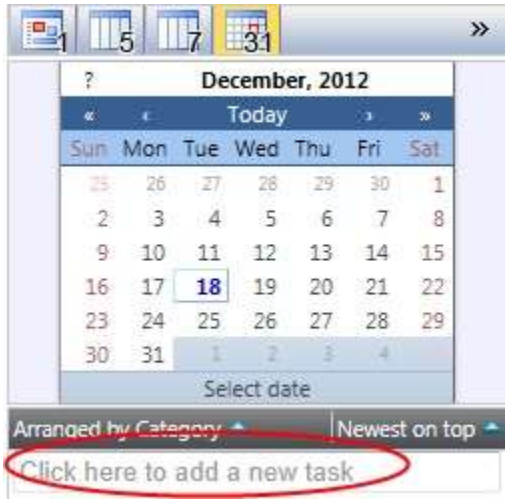
Navigation and task entry are identical in all three ClientTrack calendar displays. There are numerous ways to navigate in the calendar. The names of the current month, the previous month, and the next month, as well as numbers representing the previous year and next year are initially displayed at the top of the main screen. To change the calendar to the next or previous month, click on the name of the month. To change the calendar to the same month as the one displayed but in either the next or previous year, click the year number. The same navigation features are available in the miniature calendar, but the names and numbers have been removed. Simply click on the navigation buttons « › to change the month or year displayed in the miniature calendar.

The Task Pad below the miniature calendar displays tasks that may be added to the calendar. To control what types of tasks are displayed, right click in the gray area next to Task Pad. A small window will open where you can check the type of tasks to be displayed.



Adding tasks to a Calendar:

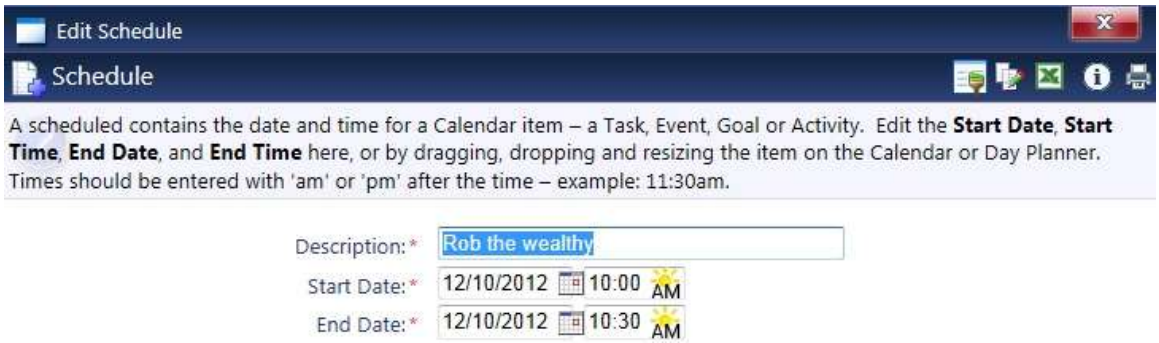
1. In the right side of the calendar screen, click the text box in the Task Pad.



2. The text will disappear. Type a description of the new task and hit Enter on the computer keyboard. The new task will move to the top of the list of tasks.

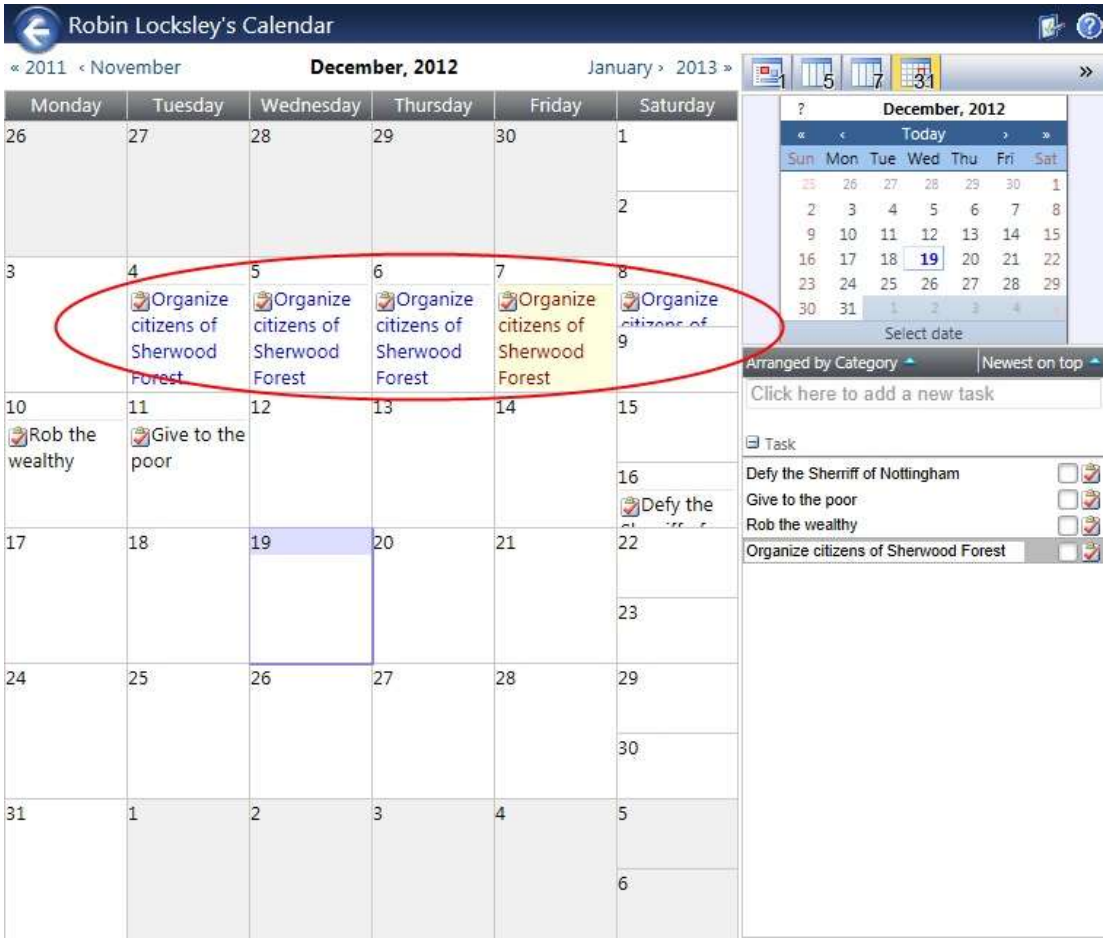
3. Place the cursor over the task and hold down the left mouse button. Drag the task to the date on the calendar to schedule the event. Release the left mouse button and a new window will open that will allow you to schedule the event.

4. ClientTrack automatically fills in the Start Date. Type an End Date or click on the small calendar icon to select a date. Fill in a start and end time, then click Save.



5. The Task will then appear on the calendar on the scheduled date. Holding the cursor over the date will open a small window with additional details displayed.

6. If the date range for the event encompasses more than one day, the event will display on all dates involved.



Note: Since the calendar control displays the range of begin and end dates of each event/activity, be sure to include an estimated end date when and where you can. Events where the end date is blank will display on the calendar indefinitely until the event is closed.

Recurrences

Each task can be scheduled on multiple days and at multiple times throughout the day. The Recurrences tool allows you to set a pattern that will automatically schedule recurring tasks rather than having to create individual schedules for each day.

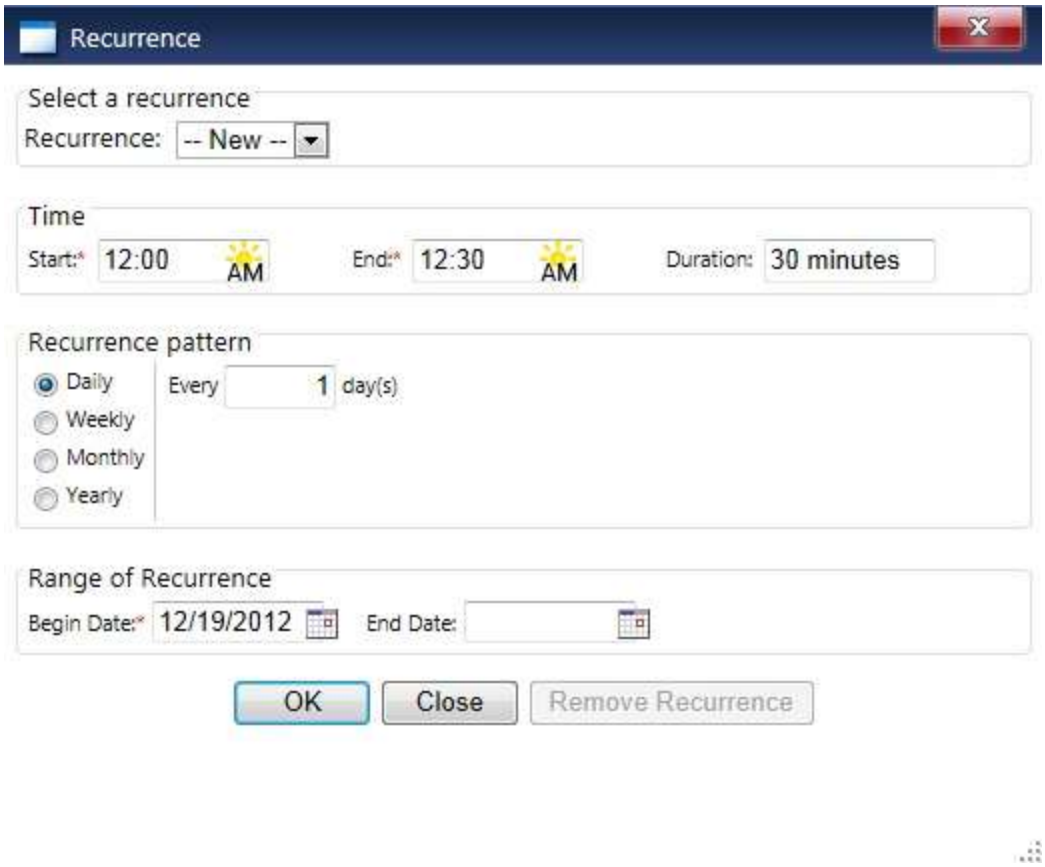
To set up a recurring task:

1. In the Task Pad, right click next to the task that you wish to schedule on a recurring basis.

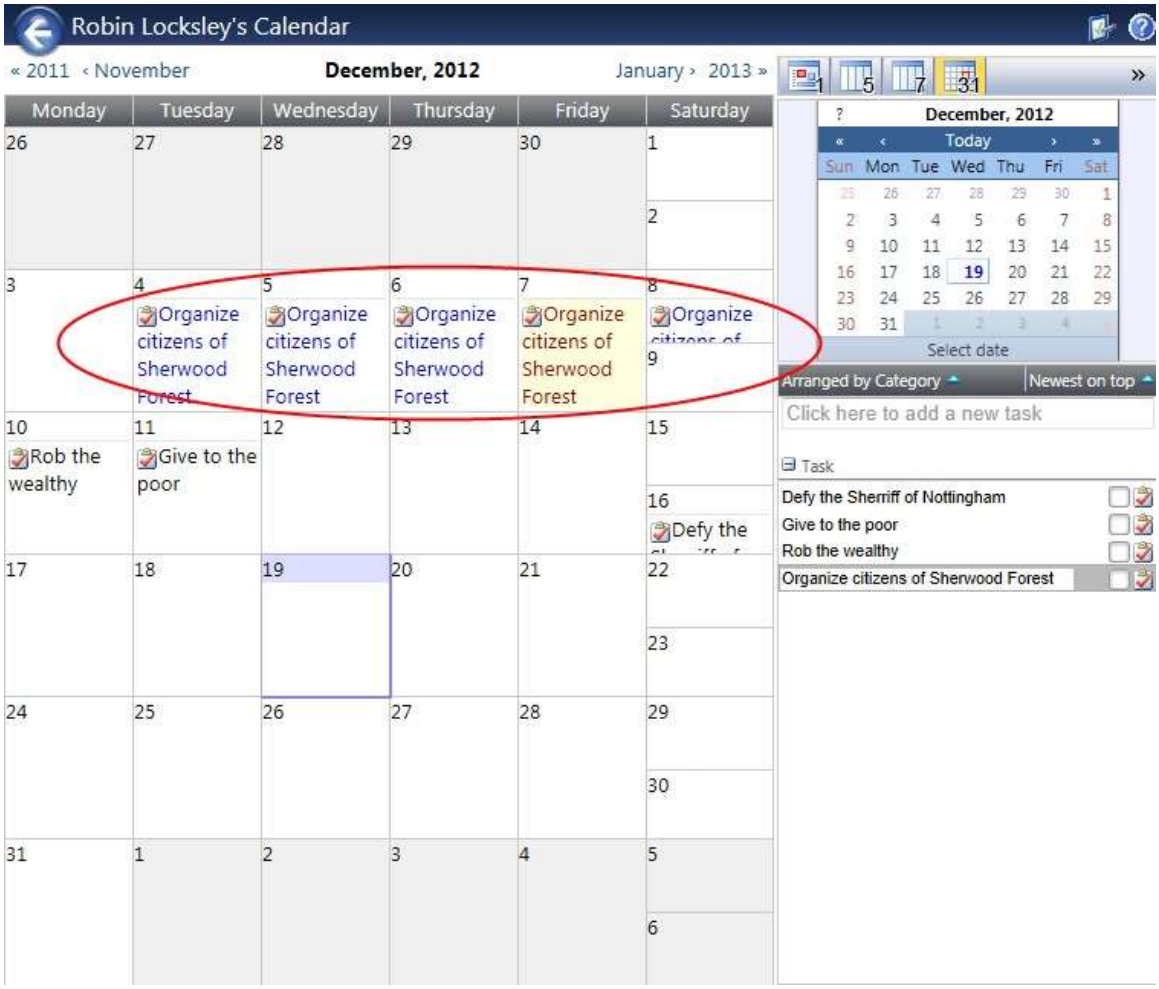
2. Click Recurrence in the context menu.

3. On the Recurrence page, Type a Start and End time and complete the desired Recurrence pattern and Range of Recurrence.

4. Click OK, then click Close.



7. The event will then appear on the calendar according the recurrence schedule created on the Recurrences page.



8. To modify or delete the current recurrence or to create a new recurrence, right click the task in the Task Pad and click Recurrence.

9. To modify the existing recurrence, change the Recurrence Pattern and/or the Range of Recurrence as desired, then click OK.

10. To create a new recurrence, select New in the dropdown menu at the top of the page and enter the information concerning the recurrence.

11. To delete the recurrence, click Remove Recurrence.

Note: Removing a recurrence only deletes the pattern created for the task and will not remove tasks that have been added to the calendar through the recurrence process. However, modifying a recurrence pattern will delete any previously generated schedules and generate new schedules matching the new pattern.

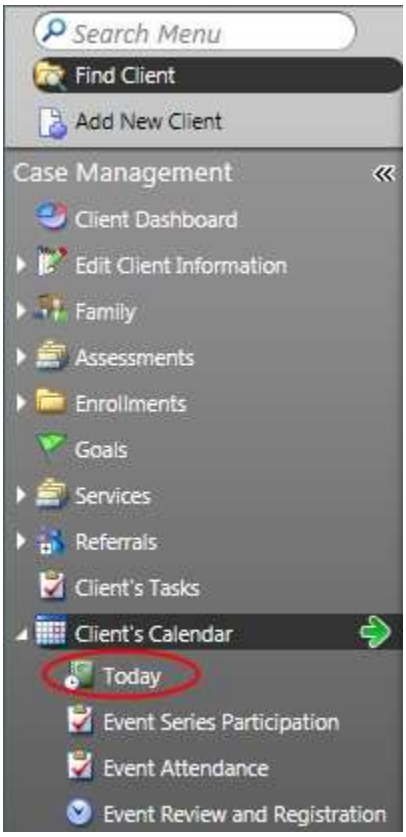
12. When finished, click OK then click Close.

Today Calendar

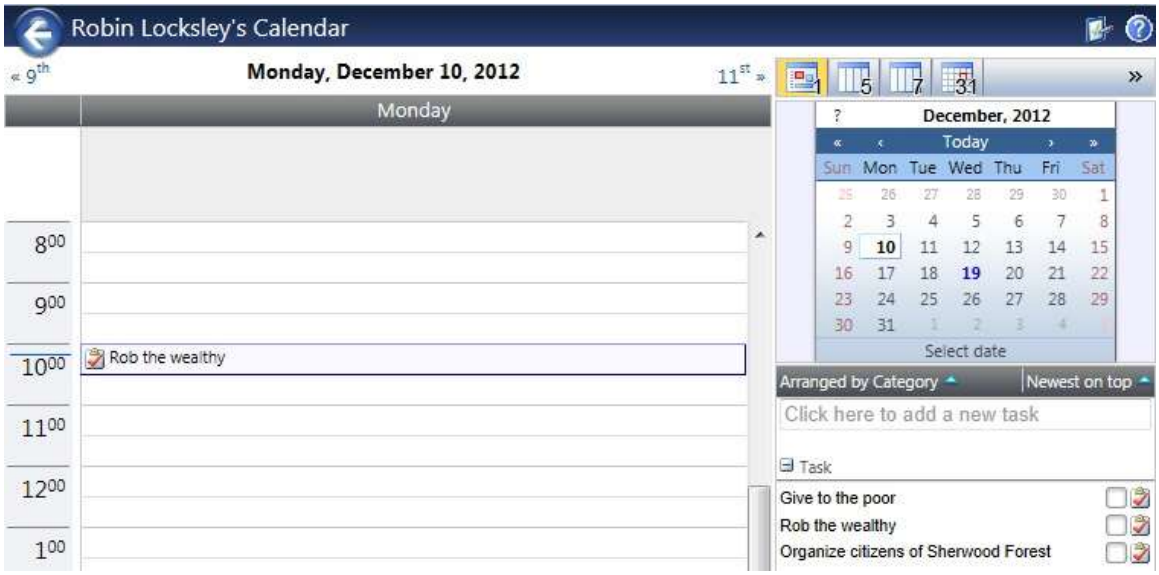
In addition to the calendar display, user and client schedules can also be entered in the today calendar, which displays events similar to Microsoft Outlook.

To schedule events on the Day Planner:

1. There are numerous ways to access the Day Planner in ClientTrack. On the Clients tab in the My Client Track menu and on the Clients tab in the Case Management menu, click to expand the Calendar option and then click Today. Also, whenever the monthly calendar is displayed, double clicking on the date in either the Main Screen or Miniature calendar will display the Day Planner. Once the Day Planner is displayed, click a date in the Miniature Calendar to change the date in the Day Planner.



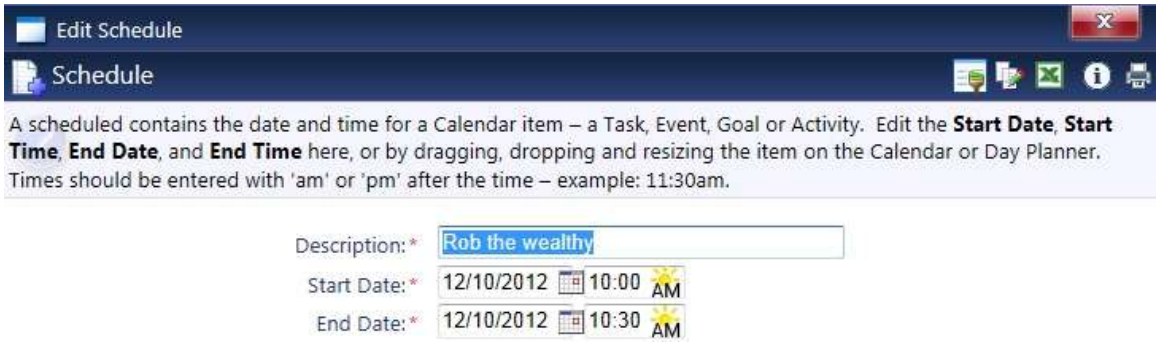
2. Items are scheduled in the Day Planner in the same manner as in the calendar, by dragging and dropping from the Task Pad. Drag the item to the hour you want to schedule the event. Once items are scheduled, they can be moved to a different time by dragging and dropping.



3. To move the event to a different date, right click the event and then click Edit Schedule.

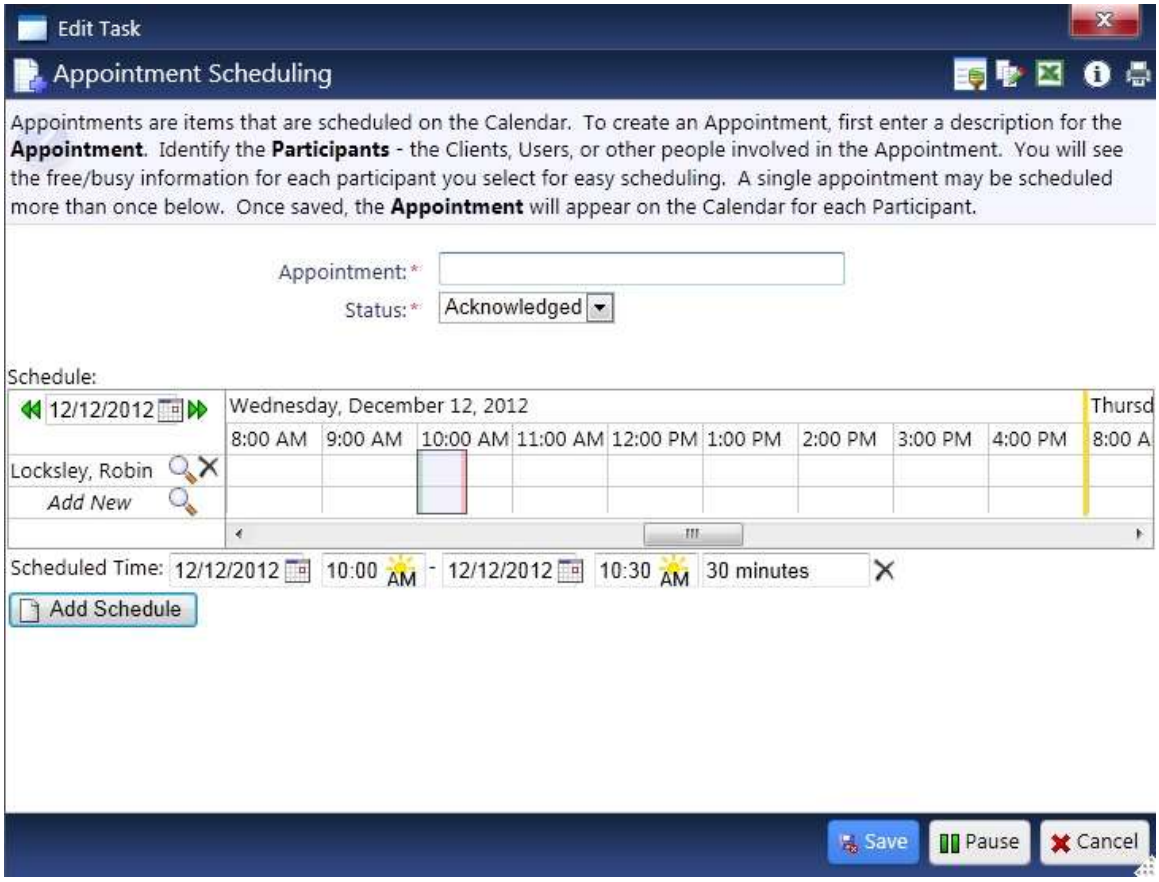
4. Change the scheduled Start Date and End Date and times as desired.

5. Click Save. The event will now appear in the Day Planner on the new day and time.



Scheduling a Task Directly From the Calendar

To schedule a task directly from the main calendar screen, double click on the date that you want to schedule the task. The Day Planner will then be displayed. Double click on the time that you would like to schedule the event. The Task page will then be displayed, where you can enter the information concerning the task.



Linking ClientTrack to Microsoft Outlook

Items scheduled in the ClientTrack User calendar can be synchronized with a user's Microsoft Outlook 2003 - 2010 calendar if desired.

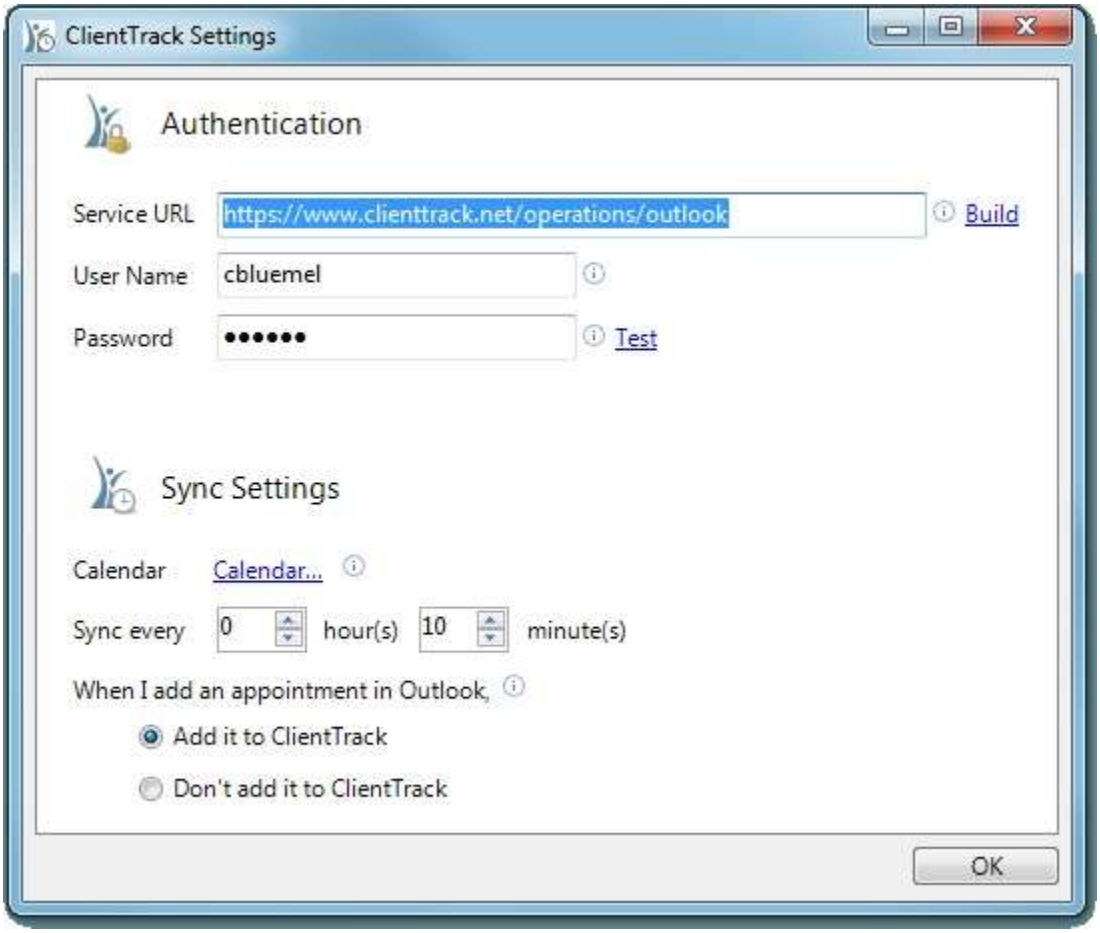
Outlook 2007 - 2010 offers bi-directional synchronization, while Outlook 2003 allows calendar items from ClientTrack to appear in Outlook, but not the other way around.

ClientTrack offers a plug-in program that may be downloaded to your computer to link the two programs together. You may request the application from your system administrator.

After the program is installed on a user's computer, a small window will open after starting Outlook to enter the user's login information.

1. To create the Service URL, click Build then enter the full web address for your database (including https://) and click OK.
2. The Username and Password are the same as those used to login to ClientTrack.
3. Define the sync interval (how often Outlook synchronizes with ClientTrack) and whether you want calendar items in Outlook to be synced to ClientTrack (Outlook 2007 - 2010 only).

4. Click OK to save your settings.



A new window will open that verifies that ClientTrack and Outlook are linked. Items entered in your ClientTrack calendar will now be displayed in your Outlook calendar.

ClientTrack Security

How is client information shared and restricted in ClientTrack?

The client record contains two basic components, client intake and client transactions. Organizations own the data they enter and have rights to share or restrict the information with other organizations. Sharing and restriction of records is managed through Data Sharing Tools and Restriction Options.

Note: Client intake information is the data that is collected on the client intake form (Add New Client or Edit Client Information). All other information is considered a client transaction. This includes assessments, services, case notes, etc.

Data Sharing Tools

Data sharing tools discretely share the transactions recorded by an organization and can also be used to selectively share client intake records. Data sharing tools include Information Release Exceptions and Information Release Agreements.

Note: Data sharing may be handled at an administrative level for your organization, so you may not see all data sharing tools.

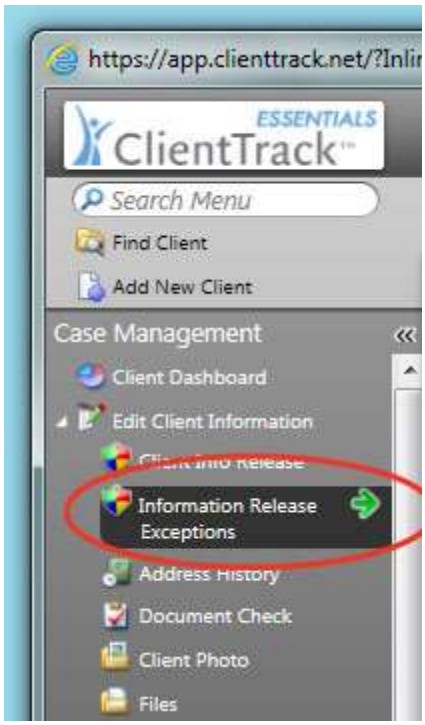
Information Release Exceptions

- Information Release Exceptions are one-way sharing relationships between two organizations; a granting organization shares to an accessing organization.
- An Information Release Exception is created on the client level and applies only to that client.
- An Information Release Exception contains begin and end dates.
- A client can have multiple Information Release Exceptions.
- Information Release Exceptions augment an Information Release Agreement if the client has been assigned to an Information Release Agreement.
- The Information Release Exception tool represents an Information Release form, which lists the accessing agency, is signed by the client, and kept on file by the agency.

Note: An organization can only share *out* to other organizations thru Information Release Exceptions.

To share client information to other organizations thru Information Release Exceptions:

1. On the Client tab, in the Case Management menu, click Edit Client then click Release Exceptions.

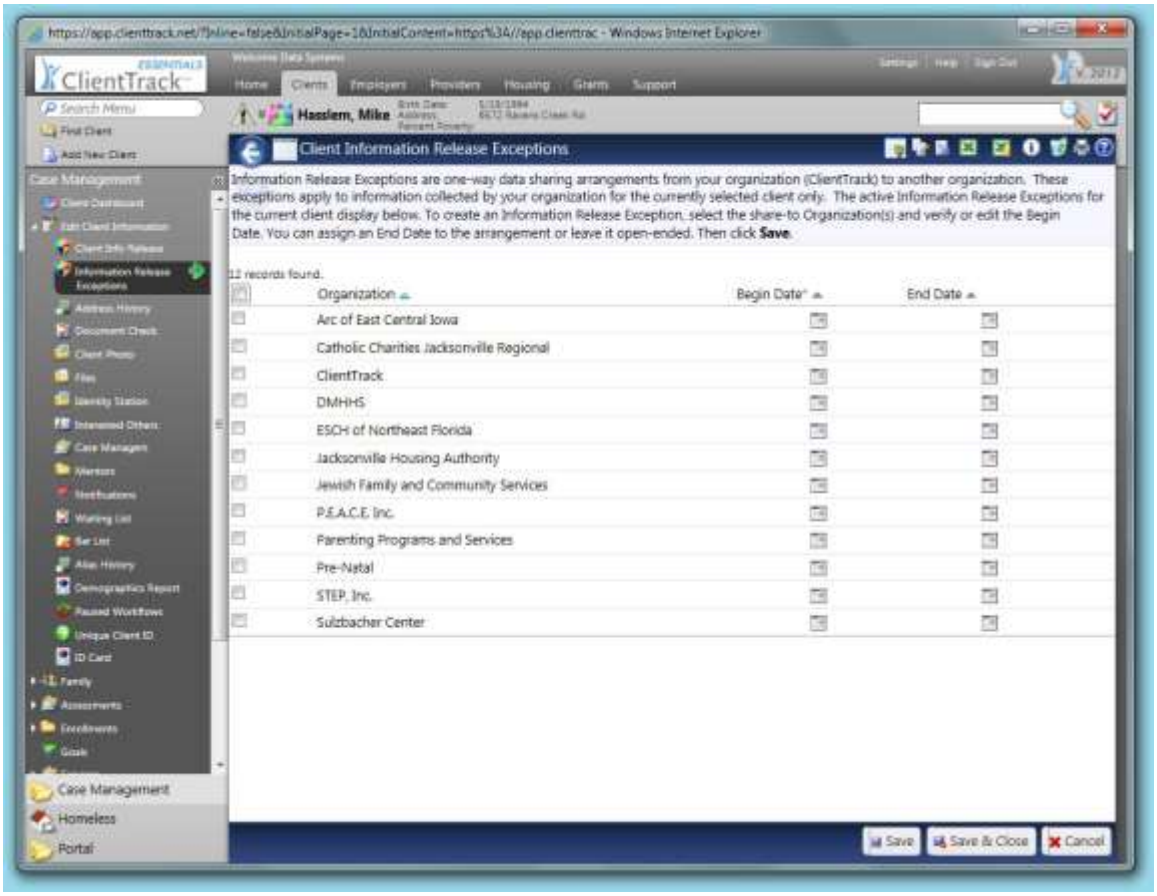


2. On the Client Information Release Exceptions page, select the organizations which will have a one-way sharing arrangement from your organization by clicking the checkbox next to each organization's name.

3. To select all organizations in the list, click the checkbox next to Organization at the top of the column.

4. Verify or edit the Begin Date, and if desired, enter an End Date.

5. Click Save.



Information Release Agreements / MOUs

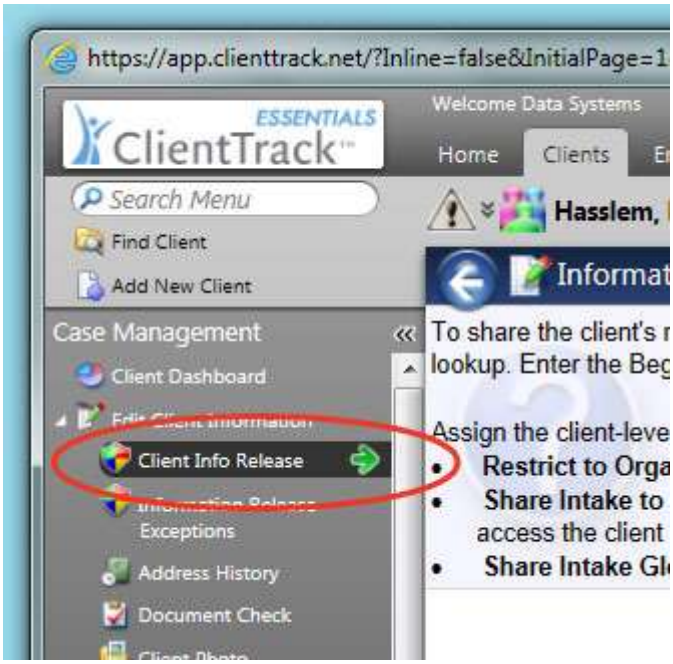
- An Information Release Agreement or Memorandum of Understanding (MOU) is a multi-directional sharing relationship between multiple organizations.
- MOUs are created by System Administrators and are available to any granting organization within the MOU.
- MOUs do not share all clients by default. A client must be assigned to an MOU in order to be a part of that sharing scenario.
- A client can only be assigned to one MOU.
- The MOU tool represents a written agreement signed by the participating agencies and an Information Release form listing either the collaboration or accessing agencies by name, signed by the client, and kept on file by the agency.

Note: Only the organization that created that client intake can assign an MOU to that client.

To share client information to other organizations thru an Information Release Agreement:

1. Locate the client using Find Client.

2. On the Client tab, in the Case Management menu, click Edit Client then click Information Release.



3. On the Information Release and Security page, click on the Find icon to display Information Release numbers for your organization.

4. On the Find Information Release page, select an Information Release # from the list of agreements that include your organization. Clicking the Find icon will display a list of participating organizations within the agreement.

5. After selecting the Information Release # ClientTrack will automatically reopen the Information Release and Security page with the selected number entered.

6. Type a Begin Date and an End Date for the information release.

7. If desired, enter an electronic signature in the Signature box.

8. Click Save.

Restriction Options

Restriction Options are security settings on each client intake and transaction record that control whether that record is accessible to other organizations. Restriction Options work in conjunction with Data Sharing Tools in the ClientTrack security model.

Client Restriction Options

The Security Restriction options on the Client Intake record are located on the Information Release and Security page and also appear on the Client Intake page. The client restriction governs the intake portion of the client record and controls access to the client record through the Find Client search. Only the creating organization can define or modify this security setting, and the creating organization must select only one of the following settings for each client.

Restrict to Organization

This setting overrides Information Release. No other organizations can see the client's name and intake information using the Find Client search method. In addition, they will be unable to open the client record. This setting is for clients who refuse to share their identity within the system, for organizations that do not want their clients to appear in the system, and for situations where the client's information does not need to be shared with other organizations for reporting purposes.

Note: Restrict to Organization on the client intake will hide the client's record from other organizations and can result in the creation of duplicate client records in the system.

Share Intake to MOU/Info Release

This setting hides the client name and intake from organizations that are not part of an MOU or Information Release Exception for that client. The client name and intake information can be viewed only by the accessing organizations listed in the active MOU or Information Release Exception.

Note: If there are no accessing organizations (no active MOU or Information Release Exception), then this setting functions similar to Restrict to Organization.

Share Intake Globally

This setting allows any organization in the system to see the client's name in the Find Client search method. Any organization can open the client's intake information and create transactions for that client. However, organizations will not be able to view information recorded by other organizations without an MOU or Information Release Exception. This is the system-wide default setting when a client intake is created.

Note: To use this setting for a client's record, the organization may need to obtain client consent to share information to other organizations in the system.

To manage the Client Security Restriction:

1. Locate the client using Find Client.
2. On the Client tab, in the Case Management menu, click Edit Client then click Information Release.
3. On the Information Release and Security page, select a Security Restriction.
4. Click Save.

Transaction Restriction Options

Transactions such as Assessments, Services and case notes, by default, are NOT shared. In order to share transactions across organizations, data sharing must be enacted through an Information Release Agreement or Information Release Exception. If data sharing is in place, records can be excluded from sharing on a record-by-record basis through the transaction level Restriction.

Note: Restriction Options on transaction edit forms may be hidden for your organization based on how your system is configured. In this case, transactions will be saved with a default restriction setting.

Restrict to Organization

Restrict to Organization will hide the record from other organizations that have access to the Client through Information Release.

Restrict to User

Restrict to User will hide the transaction record from all other users.

Unrestricted

Unrestricted is the default setting and will share the record for viewing but not editing by other organizations if the Client record is set to Share Intake to MOU/Info Release. If now MOU is specified, this will behave the same as Restrict to Organization

To assign a Transaction Restriction Option:

1. Locate the client using Find Client.

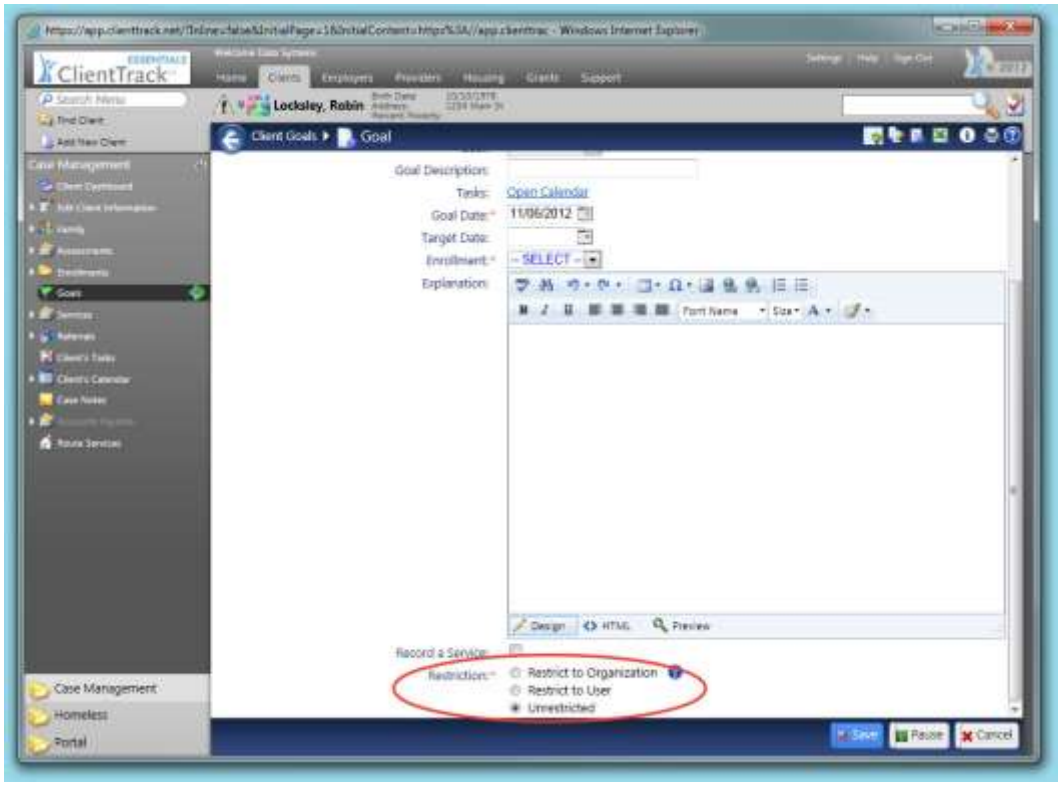
2. On the Client tab, in the Case Management menu, click a transaction summary form, such as Goals.

3. Click Add New.

4. Enter the required data and optional information as desired.

5. Click a Restriction option.

6. Click Save.



Contacting ClientTrack

Corporate Headquarters

Address:	ClientTrack 545 East 4500 South Suite E-260 Salt Lake City, UT 84107 USA

Telephone:	(888) 449-6328
Fax:	(866) 224-4506
Sales	info@clienttrack.com
Support	(855) 374-7877 helpdesk@clienttrack.com
Web Page:	www.clienttrack.com
Office Hours:	Monday – Friday 8 am to 6 pm Mountain Standard Time