ClientTrack™

User Guide

HMIS Emergency Shelter Projects

Table of Contents

HMIS Introduction

A Homeless Management Information System (HMIS) is the information system designated by a local Continuum of Care (CoC) to comply with the requirements of CoC Program interim rule 24 CFR 578. It is a locally-administered data system used to record and analyze client, service, and housing data for individuals and families who are homeless or at risk of homelessness.

In 2010 the U.S. Interagency Council on Homelessness (USICH) affirmed HMIS as the official method of measuring outcomes in its *Opening Doors: Federal Strategic Plan to Prevent and End Homelessness.* Since then many of the federal agencies that provide McKinney-Vento Act and other sources of funding for services to specific homeless populations have joined together and are working with HUD to coordinate the effort.

HMIS is now used by the federal partners and their respective programs in the effort to end homelessness, which includes:

- U.S. Department of Health and Human Services (HHS)
- U.S. Department of Housing and Urban Development (HUD)
- U.S. Department of Veterans Affairs

Universal Data Elements

HMIS Universal Data Elements are elements required to be collected by all projects participating in HMIS, regardless of funding source.

The Universal Data Elements establish the baseline data collection requirements for all contributing CoC projects. They are the basis for producing unduplicated estimates of the number of people experiencing homelessness, accessing services from homeless assistance projects, basic demographic characteristics of people experiencing homeless, and patterns of service use, including information on shelter stays and homelessness over time.

The Universal Data Elements are the foundation on which the Annual Homeless Assessment Report (AHAR) is developed. The AHAR provides Congress the national estimates of the current state of homelessness across the United States and the use of homeless assistance programs. It is used locally to inform state and local communities on how their specific homeless information compares nationally. The AHAR is used by the U.S. Interagency Council on Homelessness to measure progress towards goals specified in *Opening Doors* and by all of the federal partners to inform homelessness policy. Universal Data Elements also help local communities to better target resources, and position programs to end homelessness.

The following are the Universal Data Elements:

- 3.1 Name
- 3.2 Social Security Number
- 3.3 Date of Birth
- 3.4 Race
- 3.5 Ethnicity
- 3.6 Gender
- 3.7 Veteran Status
- 3.8 Disabling Condition
- 3.917 Living Situation
- 3.10 Project Entry Date
- 3.11 Project Exit Date
- 3.12 Destination
- 3.13 Personal ID
- 3.14 Household ID
- 3.15 Relationship to Head of Household
- 3.16 Client Location

Program Specific Data Elements are client level data elements required by a specific Federal program or program component.

Emergency Shelter projects require the collection of the following Program-Specific Data Elements in addition to the Universal Data Elements:

- 4.2 Income and Sources
- 4.3 Non-Cash Benefits
- 4.4 Health Insurance
- 4.5 Physical Disability
- 4.6 Developmental Disability
- 4.7 Chronic Health Condition
- 4.8 HIV/AIDS
- 4.9 Mental Health Problem
- 4.10 Substance Abuse
- 4.11 Domestic Violence

HUD Data Standards Tutorials can be accessed at:
https://www.hudexchange.info/programs/hmis/guides/data-element/

HMIS Workstation Security Procedures

Most security breaches are due to human error rather than systematic issues. In order to keep the application and data secure, Contributory HMIS Organization (CHO) End Users must also implement some additional security measures.

Policy: CHO End User's computer screens should be placed in a manner where it is difficult for others in the room to see the contents of the screen.

Description:

The placement of the monitor can play a role in establishing security at the agency. CHO users should consider placing the monitor in a way that it is difficult for others to see the screen without you knowing it. **Good placement:** When someone walks into the room where the computer is, all they should be able to see should be the back of it. **Bad placement:** When someone walks into the room, they can look over your shoulder without you knowing it, and read material off the screen.

Policy: Do not write down your username and password and store it in an unsecured manner.

Description:

Do not post your HMIS user name or password information under your keyboard, on your monitor, or laying out for others to see. This type of behavior can lead to large security breaches. Passwords and usernames that are written down must be secured in a locked drawer.

Policy: Don't ever share your login information with anybody (including Site or Project Managers).

Description:

If someone is having trouble accessing HMIS, direct them to contact your Agency Administrator, call or send an e-mail to the HMIS Support Desk. Sharing usernames and passwords, or logging onto a system for someone else is a serious security violation of the user agreement. CHO users are responsible for all actions taken in the system utilizing their logons. With the auditing and logging mechanisms within HMIS any changes anyone makes or actions that are taken will be tracked back to your login.

Policy: When you are away from your computer log out of HMIS or lock down your workstation.

Description:

Stepping away from your computer while you are logged into HMIS can also lead to a serious security breach. Although there are timeouts in place to catch inactivity built into the software, it does not take effect immediately. Therefore, anytime when you leave the room and are no longer in control of the computer, you must do one of two things. First, you can lock down your workstation. Most Windows-based operating systems allow users to lock their workstation by simply pressing CTRL-ALT-DELETE keys and choosing “Lock Workstation”. This will require users to enter in their Windows password when returning. Secondly, if this is not an option for you, then at a minimum log out of HMIS.

Data Timeliness Benchmarks

Description:

To be most useful for reporting, an HMIS must include the most up-to-date information possible, on clients served by CHOs.

Procedure:

Information must be entered into HMIS within **fourteen (14) calendar days** from the point of the event, (Intake/enrollment, service delivery, or discharge).

Required HUD Benchmark:

1. Client information must be entered by CHO’s **within 5 business days following the month** in which the client was served by the contributory program.
2. Every CHO must update client information at exit and/or at annual assessment, per requirements relative to each universal and program-specific data element.

Signing in to ClientTrack

- **Web Address:** https://www.clienttrack.net/riverside
- **User Name:** Enter your assigned User Name
- **Password:** Enter your ***case sensitive*** Password

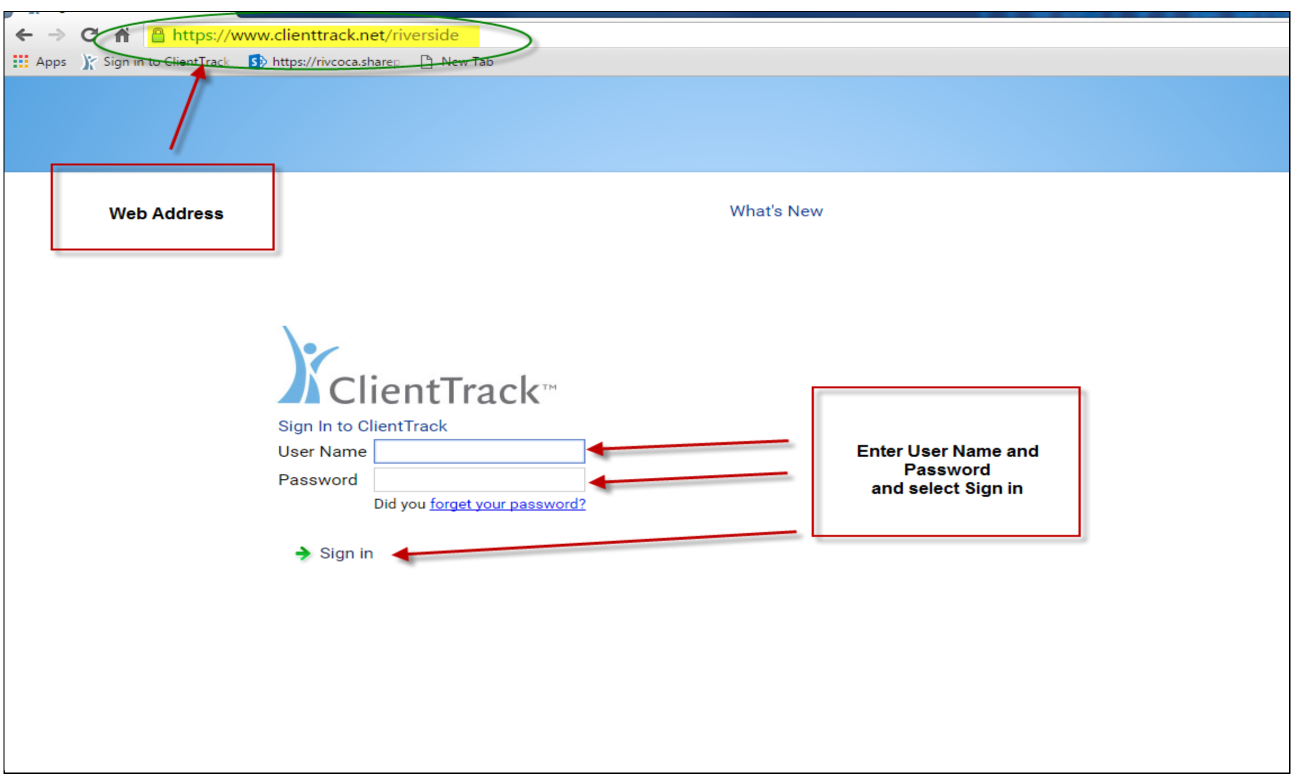
  (*First time user must change temporary password*)*

- Select “Sign In”

Be sure to **disable** any pop-up blockers that would prevent a new window from opening, prior to logging in.

*Once you log-in using the temporary password provided, you will be prompted to create a new password of your choosing. The password you choose must:

- Be at least **8 characters**
- Have at least **one number**
- Have at least **one non-letter, non-numeric character** (such as: !@#$%&*)
- Contain at least **one capital letter**

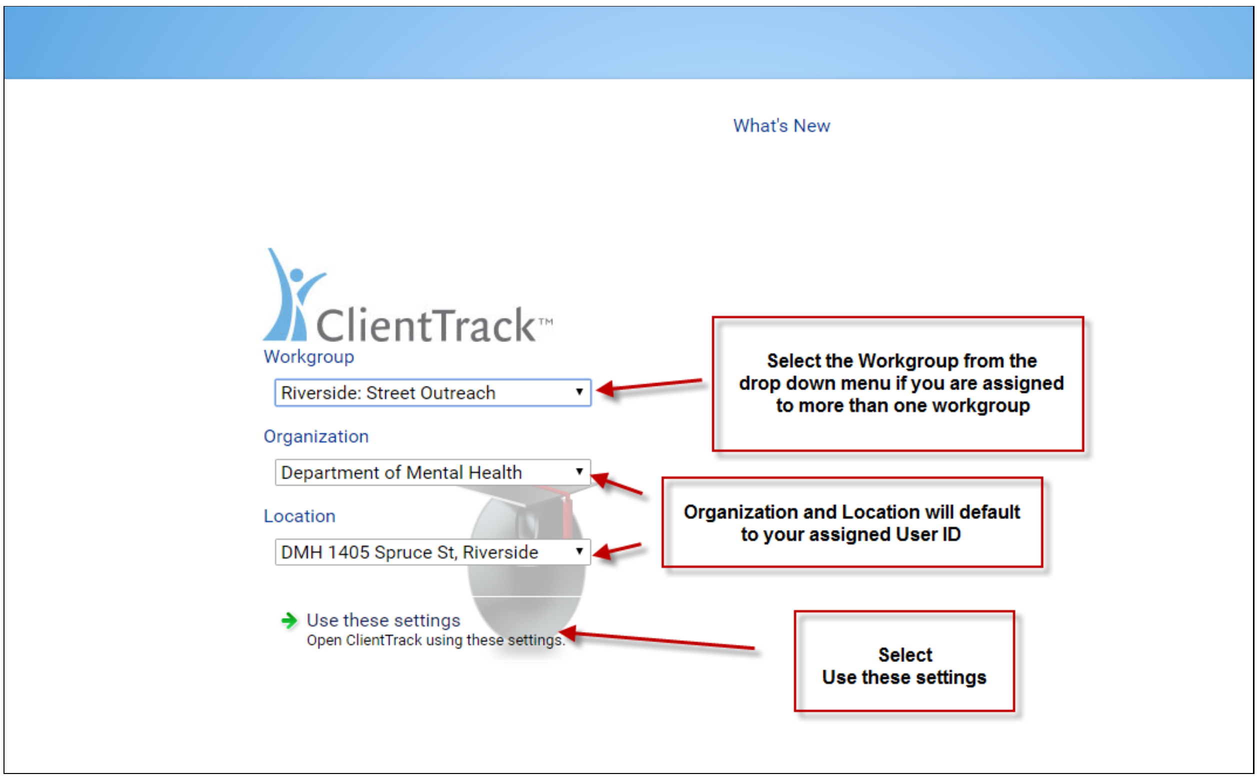


Workgroup

After you sign-in you will be directed to the Workgroup screen. Workgroups reflect functional roles determined by program type. Organizations determine which data the user can access, workgroups control which menu options the user can select.

- **Workgroup** If you are assigned to more than one Workgroup, select the appropriate Workgroup from the dropdown menu
- **Organization** Organization will default to your organization
- **Location** Location will default to your organization location

- Select "Use these settings"



Basic Navigation

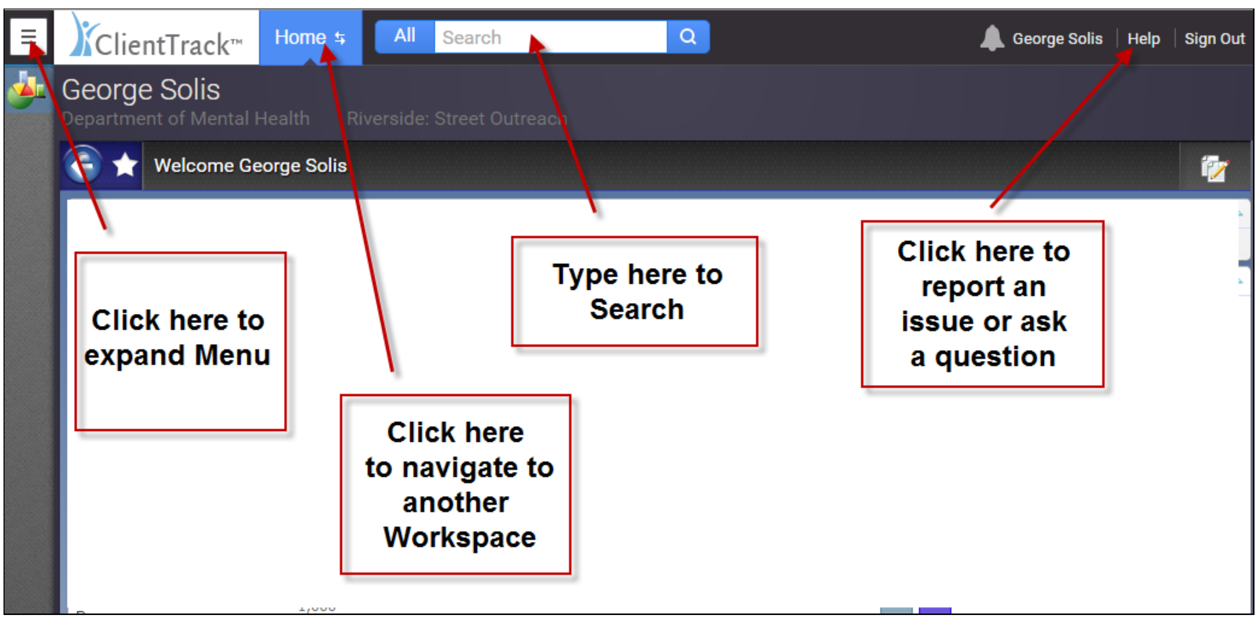
There are three Workspaces in ClientTrack.

- **Home Workspace** – Contains the User Dashboard. Some functions from this workspace include: report generation, user's paused operations, user's support tickets and changing a user's password.
- **Clients Workspace** – This workspace will default to the user's most recent client. Some functions from this workspace include: Client search, client intake, client assessments, client enrollments, client referrals and client services.
- **Support Workspace** – This workspace displays any submitted issues, questions or suggestions submitted by the user.

Home Workspace

The Home Workspace will be the default workspace when your first sign-in to ClientTrack.

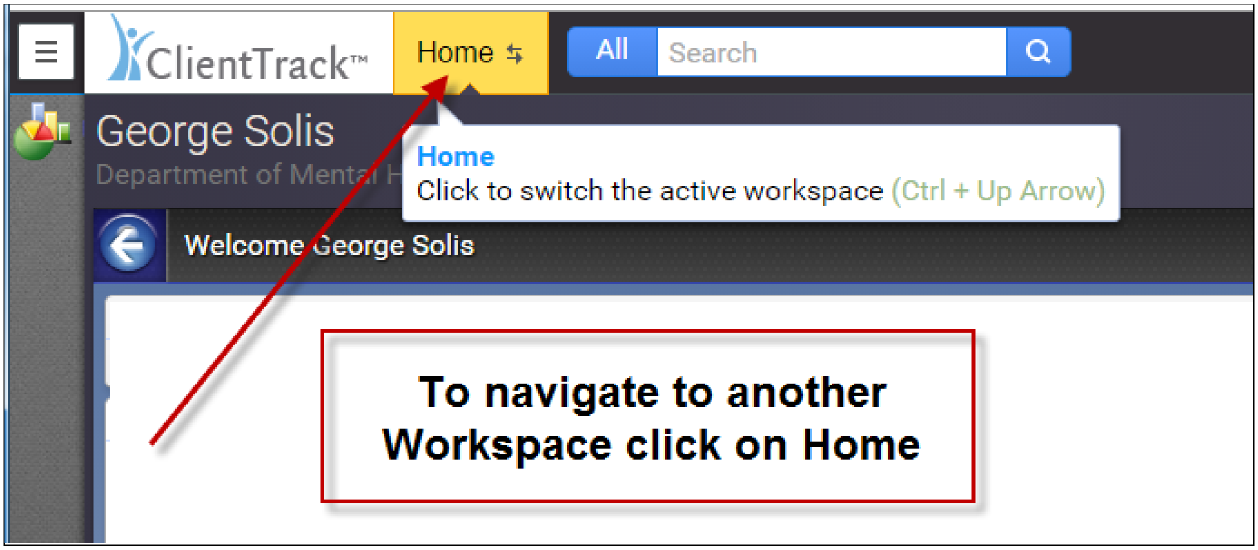
- Click on the left hand Menu Icon to expand the menu options
- Click on the Workspace navigation tab next to the ClientTrack logo to switch between workspaces
- Utilize the search function at the top of the page
- Use "Help" to report an issue or ask a question



Navigating between Workspaces

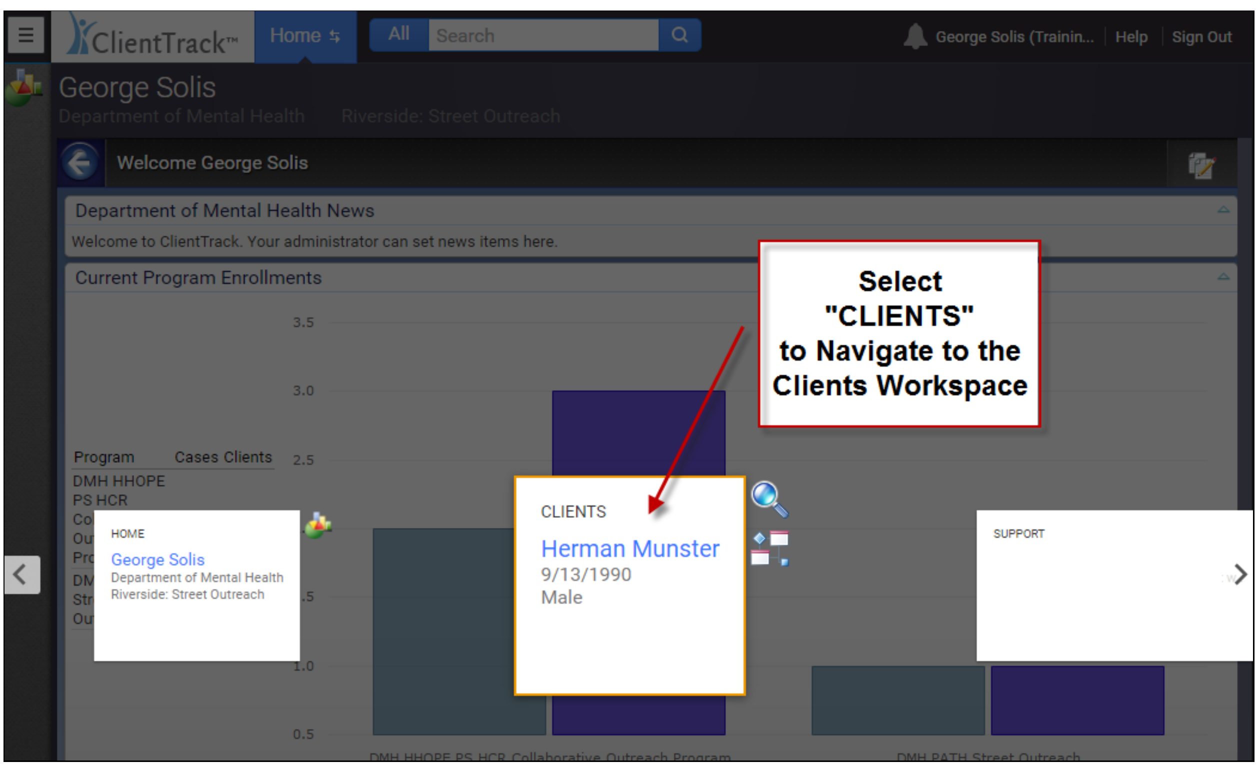
To navigate from the Home Workplace to the Clients Workspace

➢ Click on "Home" next to the ClientTrack logo.



A pop-up window will open that will allow you to navigate to another workspace.

➢ Select "Clients" to navigate to the Clients Workspace.



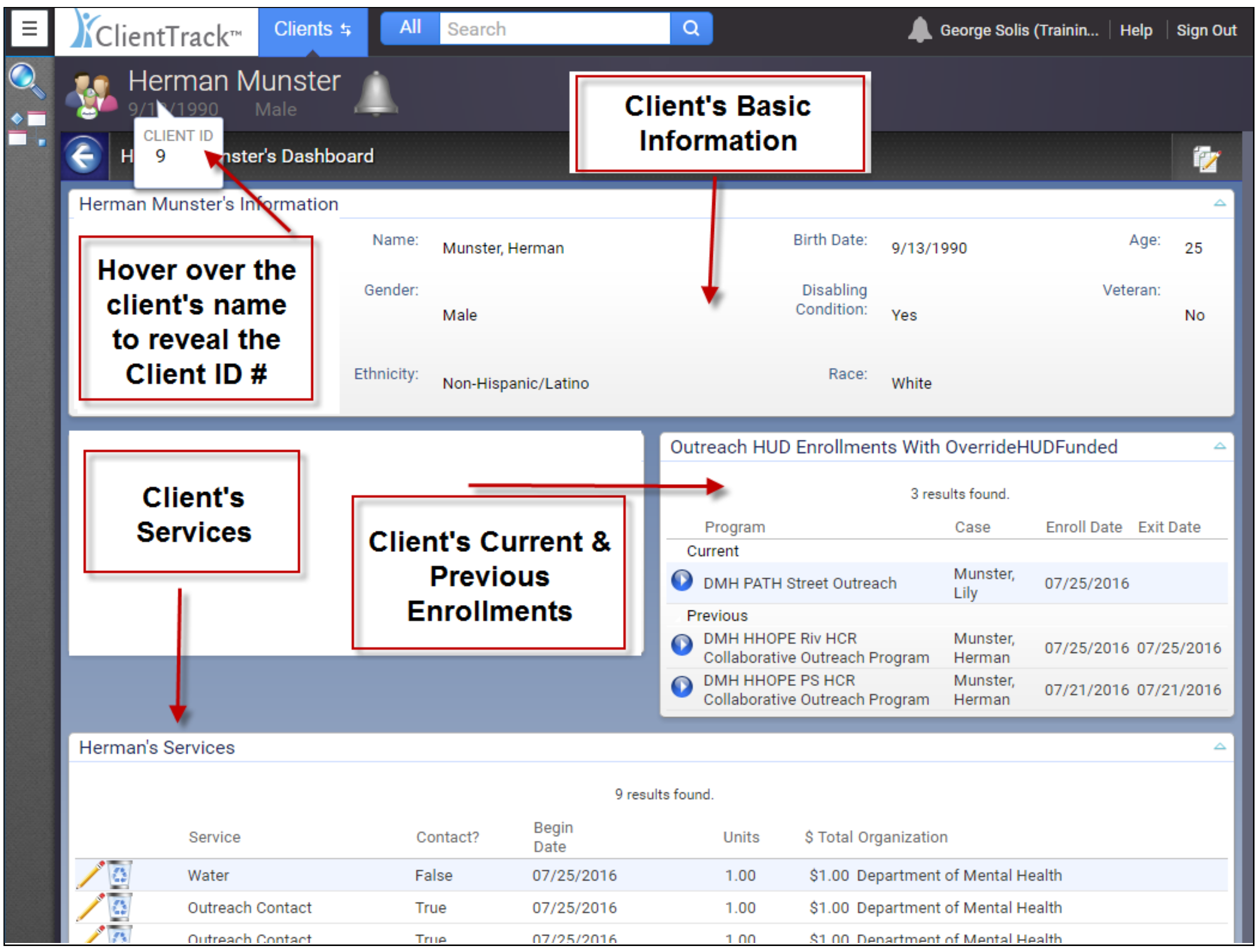
Clients Workspace

The Clients Workspace is where users spend the majority of their time in ClientTrack. When you navigate to the Clients Workspace, the user's most recent client will be displayed.

The Clients Dashboard contains three main sections:

- **Basic Client Information** which includes name, social security number, birth date, ethnicity, race, gender, disabling condition, veteran status and family information
- **Client's current and previous program enrollments**
- **Client's services**

➢ Click on any heading to navigate to that particular section



Client ID

All client records are assigned a system generated Personal ID number in HMIS.

➢ Hover over the client's name at the top of the page to reveal the Client ID #

Searching for a client

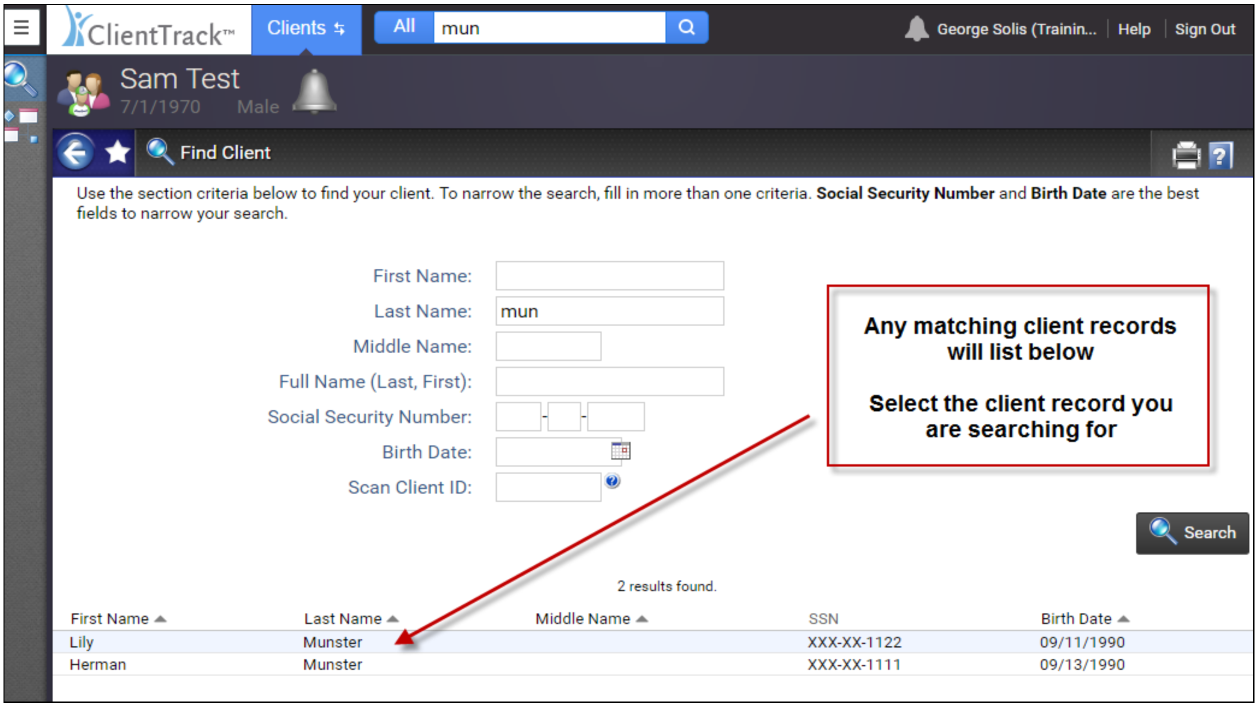
The first step in adding a new client is to search existing client records for possible matches to avoid duplicate entries. Since there are multiple users across HMIS, users **MUST** search client records by entering **partial identifying information** on the client:

- By partial first and last name only
- By last four of Social Security Number only
- By birth date only

➢ Click on the "Search Icon" on the left side menu to search for a client
➢ Enter partial identifying information
➢ Select "Search"

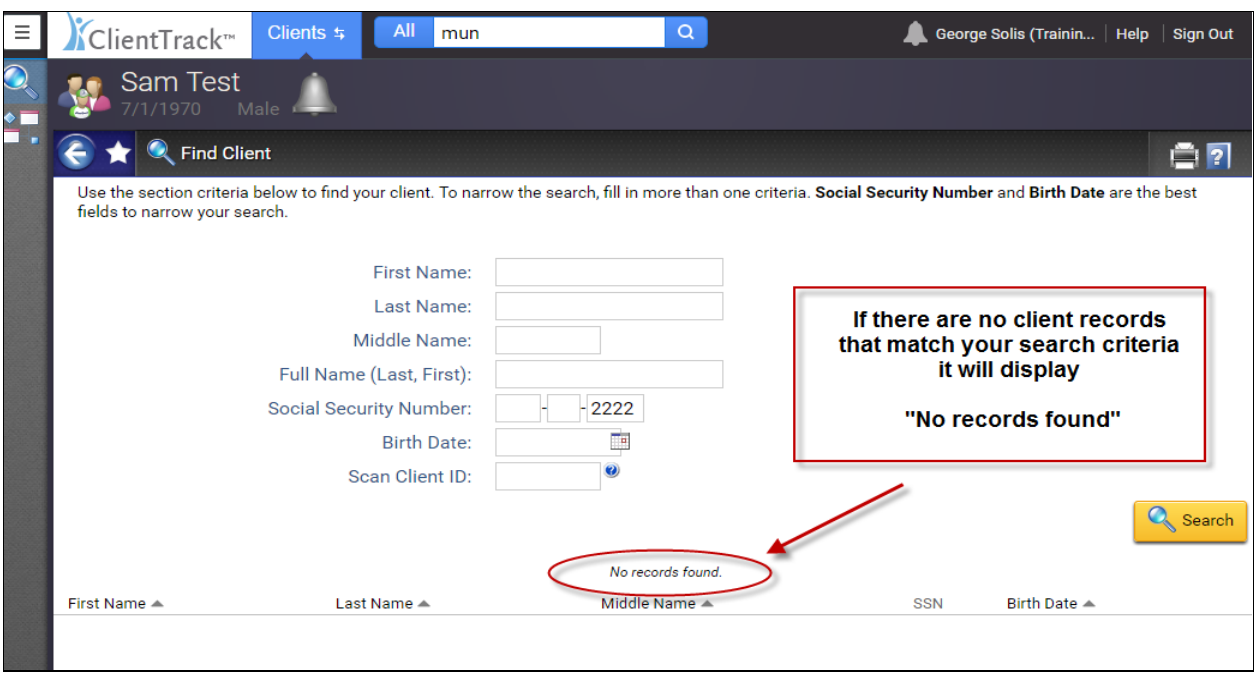
Existing Client Record

- ➢ If an existing client record exists, verify name, social security number and birth date
- ➢ Click on client record to select the client



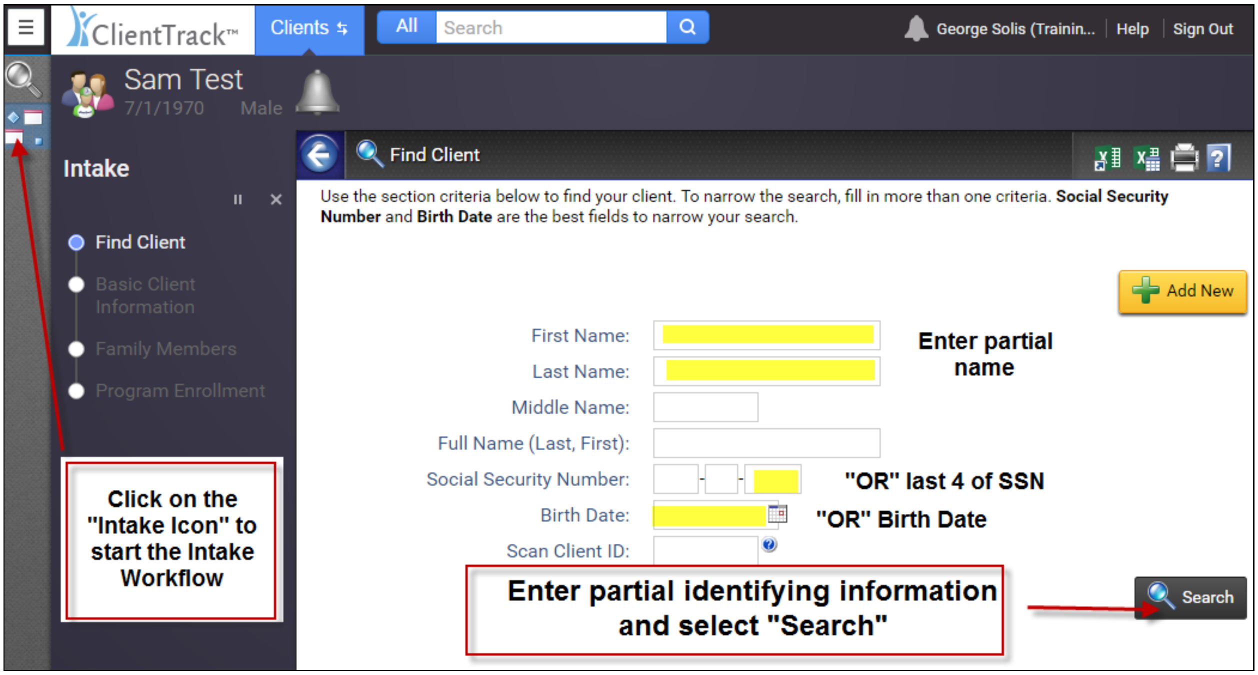
No records found

If there are no client records that match your search criteria, it will display "No records found"



Client Intake

- Click on the “Intake Icon” on the left side menu to start the Intake Workflow
- When enrolling a family, always start with the **Head of the Household**
- You must search for client to avoid duplication of records
- Enter partial identifying information
- Select “Search” at the bottom of the page

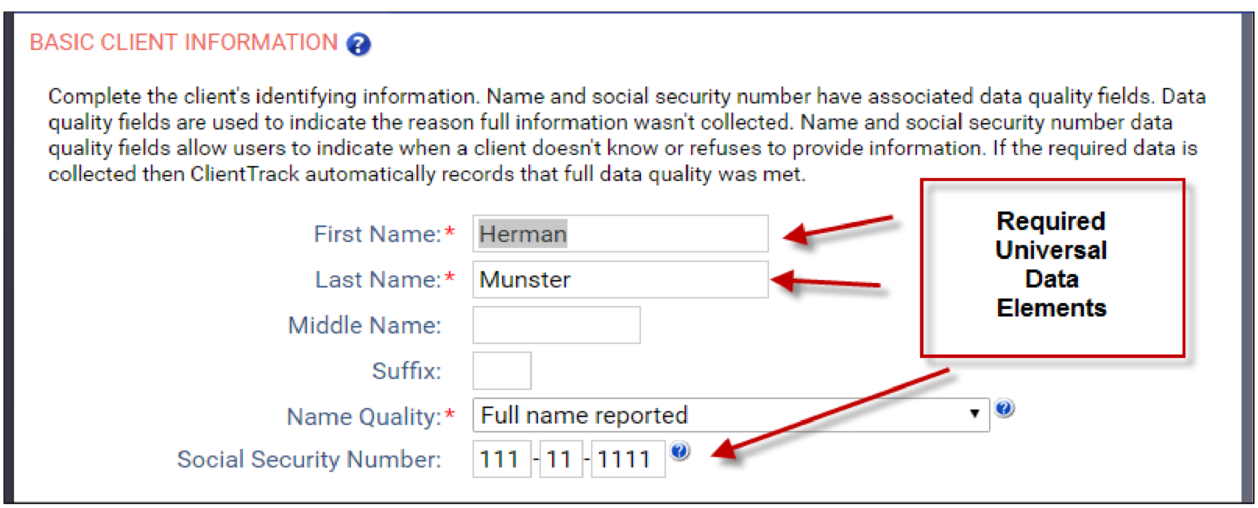


Head of Household
Identification of the heads of household for each household recorded in HMIS facilitates the identification, tracking and enumeration of households served by projects. In addition, specifying the relationship of household members to the head of household facilitates reporting on household composition.
The term “Head of Household” is not intended to mean the leader of the house; it is intended to identify one client to whom all other household members can be associated.

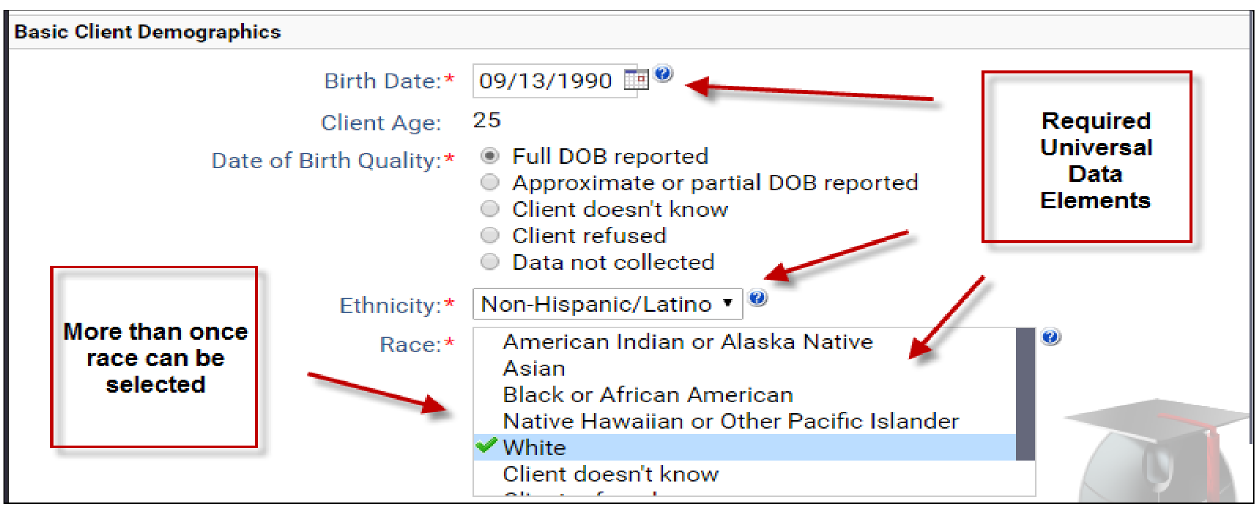
Intake with new client

Basic Client Information

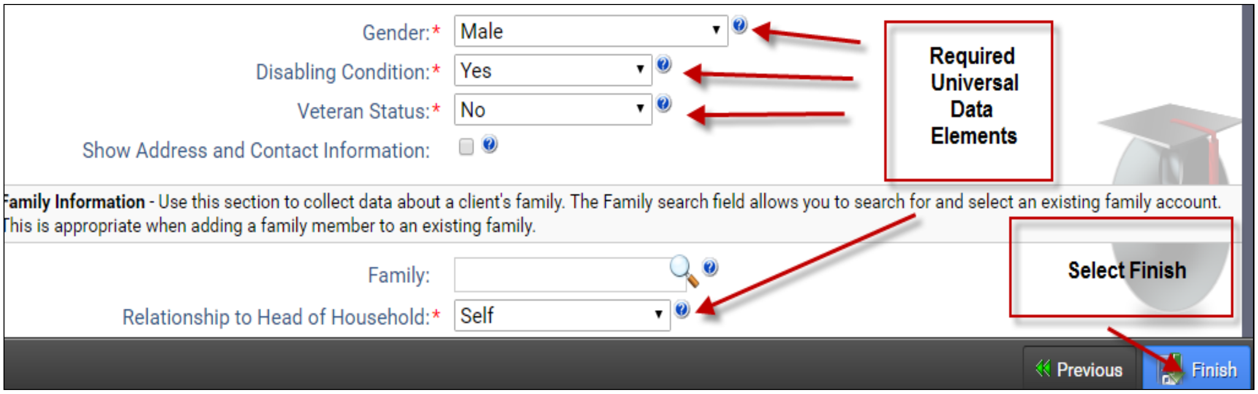
- Any field with a * is a required Universal Data Element
- 3.1 Name
  - HMIS records should use a client's full, legal name whenever possible – doing this as a standard practice makes it easier to find records when searching and avoid creating duplicate records.
- 3.2 Social Security Number
  - The collection of a client's Social Security Number (SSN) and other personal identifying information are required for two important reasons. First, unique identifiers are critical to producing an accurate, unduplicated local count of homeless persons accessing services in HMIS. Name and date of birth are useful unique identifiers, but these identifiers alone do not facilitate an unduplicated count of homeless persons as accurately as the SSN since names change and people can share the same date of birth.
  - Second, an important objective for ending homelessness is to increase access and utilization of mainstream programs by persons who are homeless or at-risk of homelessness. Since SSN is a required data element for many mainstream programs, such as Temporary Assistance for Needy Families (TANF), Medicaid, Supplemental Security Income (SSI), etc., projects may need the SSN along with other personal identifiers in order to access mainstream services for their clients.



- 3.3 Date of Birth
  - The date of birth is used to calculate the age of persons served at time of project entry or at any point during project enrollment. It also supports the unique identification of each person served. Some data collection fields are limited to head of household or other adults in the household; a client's age is one of the determining factors on which data elements are collected.
- 3.5 Ethnicity
  - Ethnicity is used to count the number of persons who do and do not identify themselves as Hispanic or Latino. Collect the self-identified ethnicity of each client served. Staff observations should not be used to collect information on ethnicity.
- 3.4 Race
  - Race is used to count the number of persons who identify themselves within one or more of five different racial categories. Allow clients to identify as many racial categories as apply (up to five). Staff observations should not be used to collect information on race.



- 3.6 Gender
    - Gender is used to collect the number of men, women, transgender individuals and clients who do not identify as either men, women or transgender. Record the self-reported gender of each client served. Staff observations should not be used to collect information on gender. Users should be sensitive to persons who do not identify as male, female or transgender.
- 3.8 Disabling Condition
    - Disabling condition is used to count the number of clients who have a disabling condition at project entry. This data element is to be used with other information to identify whether a client meets the criteria for chronic homelessness.
    - Record whether the client has a disabling condition based on one of more of the following:
        - A physical, mental or emotional impairment, including an impairment caused by alcohol or drug abuse, post-traumatic stress disorder, or brain injury that:
            1. Is expected to be long-continuing or of indefinite duration;
            2. Substantially impedes the individual's ability to live independently; and
            3. Could be improved by the provision of more suitable housing conditions.
        - A developmental disability, as defined in section 102 of the Developmental Disabilities Assistance and Bill or Rights Act of 2000; or
        - The disease of acquired immunodeficiency syndrome (AIDS) or any condition arising from the etiologic agency for acquired immunodeficiency syndrome (HIV).
    - A client receiving Supplemental Security Income (SSI), Social Security Disability Insurance (SSDI), VA Service-Connected Disability Compensation or VA Non-Service-Connected Disability Pensions should be noted as a potential "Yes" for disabling condition.
- 3.7 Veteran Status
    - Veteran status is sued to count the number of clients who are veterans of the United States armed forces.
    - Record whether or not the client is a veteran. Asking additional questions may result in more accurate information as some clients may not be aware that they are considered veterans. Example: "Have you ever been on active duty in the military?"
- 3.15 Relationship to Head of Household
    - Identification of the heads of household for each household recorded in HMIS facilitates the identification, tracking and enumeration of households served by projects. In addition, specifying the relationship of household members to the head of household facilitates reporting on household composition.
- Select "Finish" once completed



Don't Know/Refused/Data Not Collected:

Selecting "Don't Know", "Refused", or "Data Not Collected" is acceptable and will allow you to save the file. However, each field on this screen makes up the overall data quality percentage for this client. Not making a valid selection in each field will lower the data quality for this client and impact overall data quality percentages for your agency and the CoC as a whole. Missing data rates above 5% may indicate data quality issues.

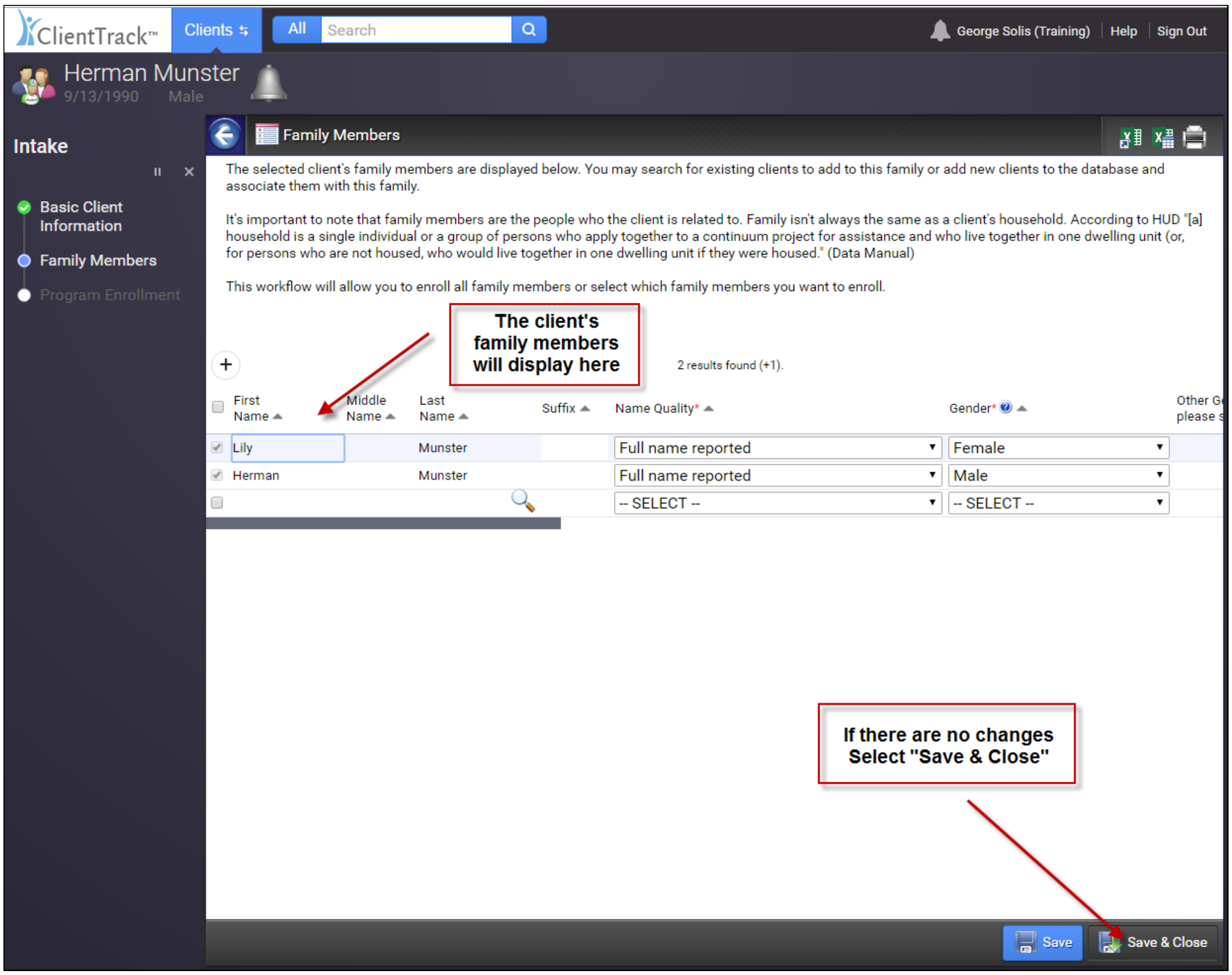
Intake with an existing client record

- Select the client record from the search results to start the Intake Workflow
- Update any of the client's information or capture any missing information
- Select "Finish"
- If all the information is accurate select "No Changes"

Family Members

Family members are the people who the client is related to. Family isn't always the same as a client's household. According to HUD "[a] household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed." (*Data Manual*)

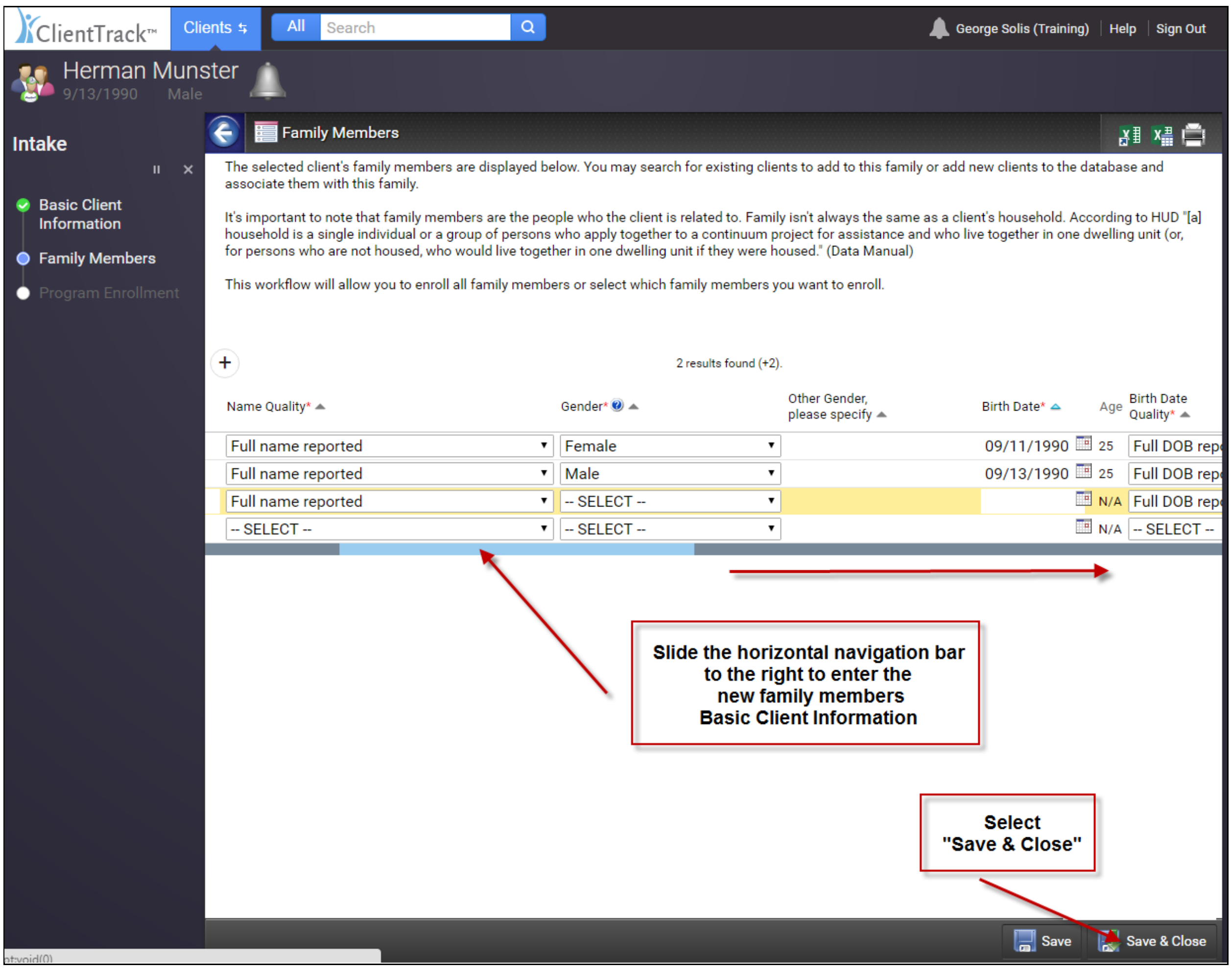
- The selected client's family members will display on the screen
- If there are no changes select "Save & Close"



Adding Family Members

You may search for existing clients to add to this family or add new clients to the database and associate them with this family.

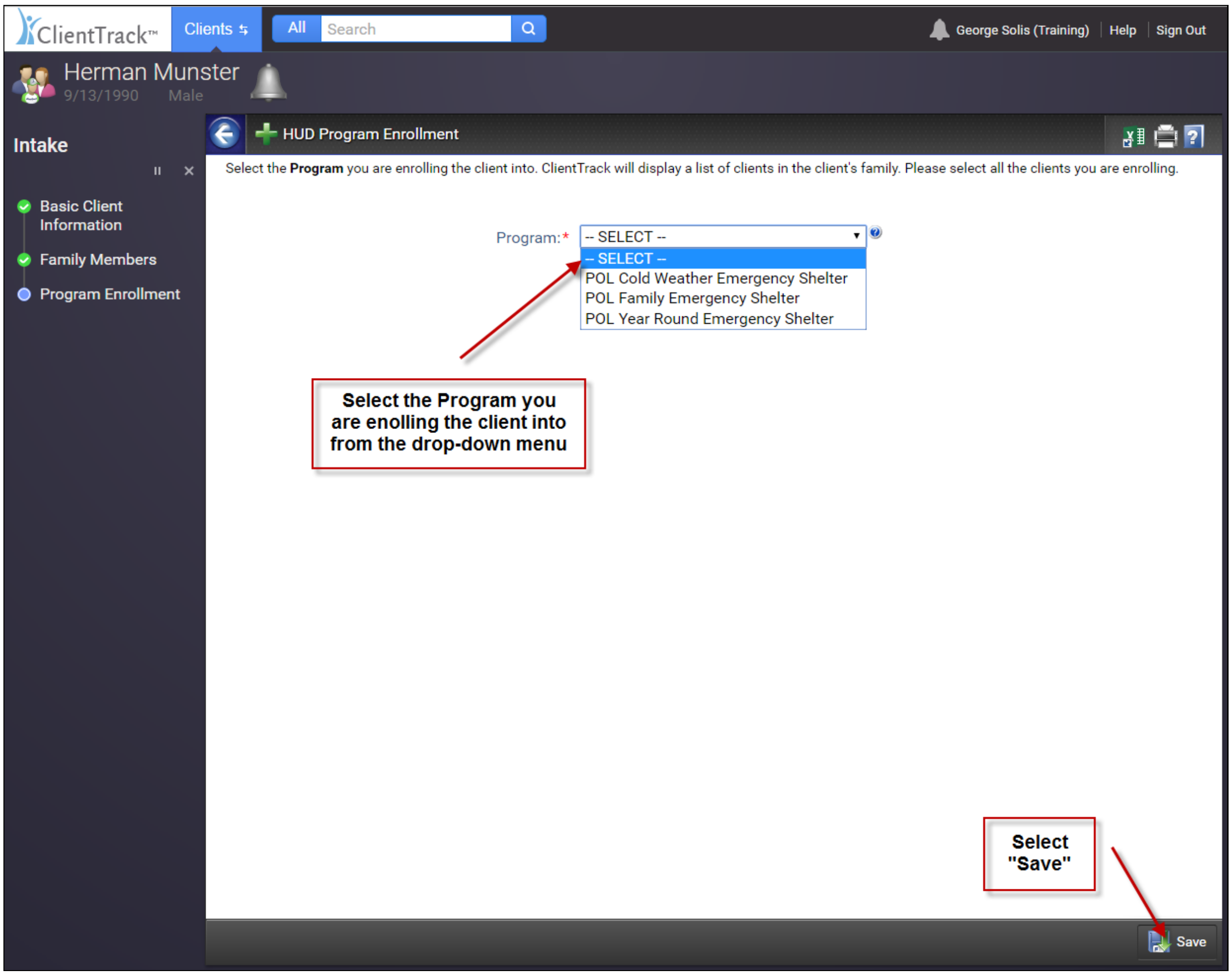
- ➢ Select the box below the client's name
- ➢ Enter partial identifying information (partial name **OR** last four of SSN **OR** birth date)
- ➢ Select the "Search icon" or use the "Tab" function on your keyboard
- ➢ A Find Client pop-up window will open
- ➢ If no records are found, slide the **horizontal navigation bar** to the right to enter family member's Basic Client Information
- ➢ When finished adding any family members select "Save & Close"



Program Enrollment

For the purposes of data collection in HMIS, a program is the source of funding that the organization is receiving to run its project (e.g., HUD CoC, HHS PATH, VA SSVF, etc.). A **Project** refers to a distinct unit of an organization, which may or may not be funded by HUD or the federal partners, that provides services and/ or lodging and is identified by the CoC as part of its service system.

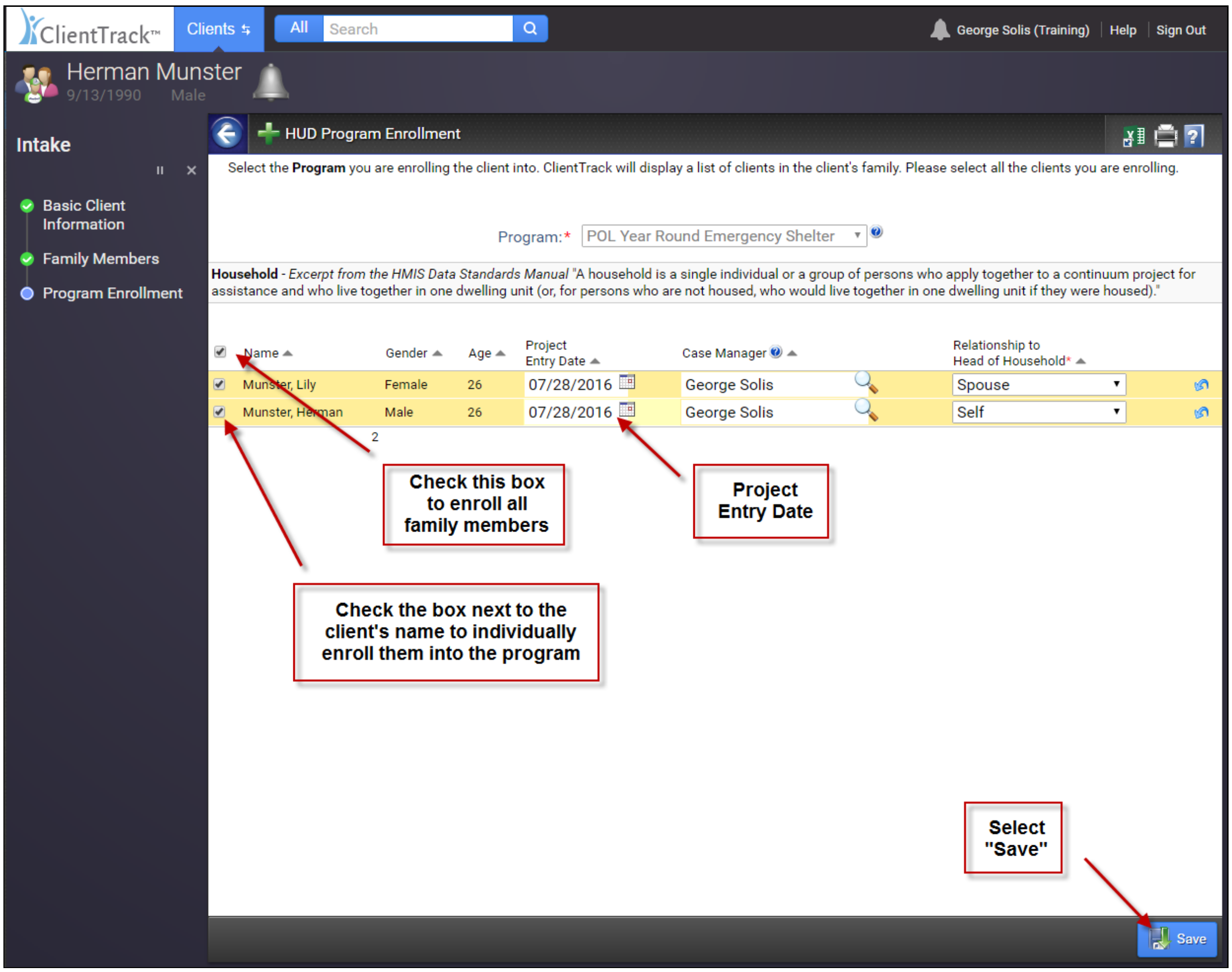
- Select the program you are enrolling the client into from the drop-down menu
- Select "Save"



3.11 Project Entry Date

The project entry date indicates a client is now being assisted by the project. For residential projects this should be the first date of occupancy in the project. All projects need this data element for reporting; residential projects need it to measure lengths of stay.

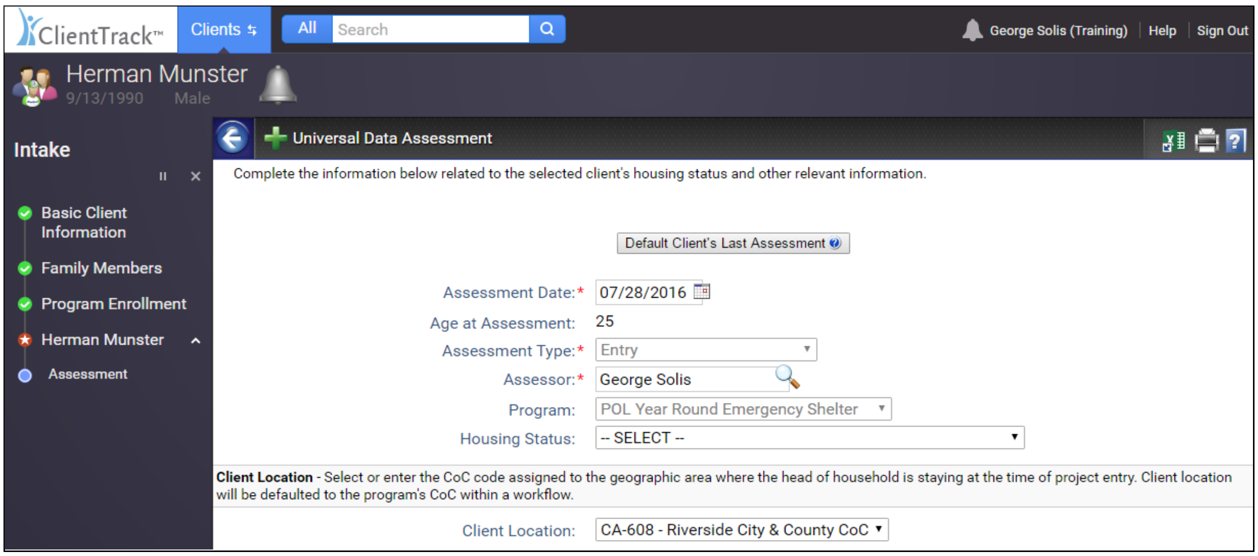
- Select which family members you are enrolling into the project by checking the box next to their name
- To select all family members, check the box above the list of names
- Project Entry Date will populate to the current date once you select the family members you are enrolling
- Select "Save"



Universal Data Assessment

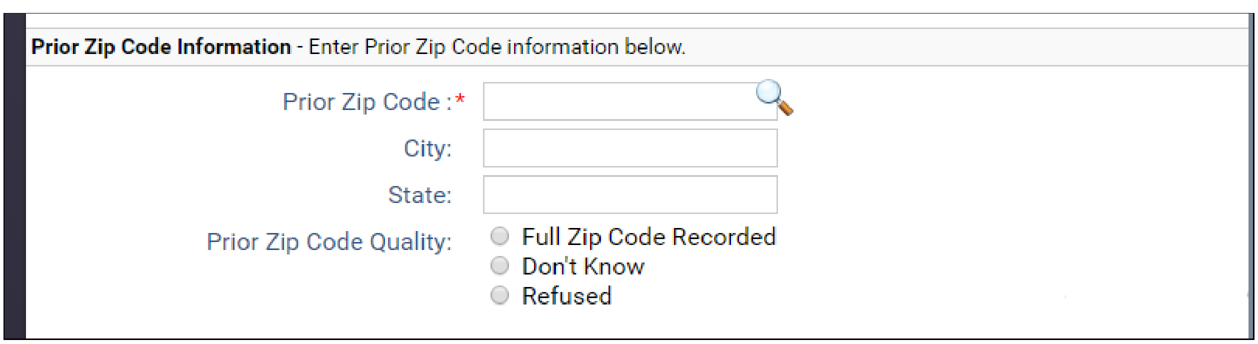
New Client

- Any field with a * is a required Universal Data Element
- Assessment date will default to the current date
- Assessment type will default to “Entry”
- Assessor will default to the user name
- Program will default to the Program of Enrollment
- 4.1 Housing Status is not a required field
- 3.16 Client Location will default to Riverside City & County CoC

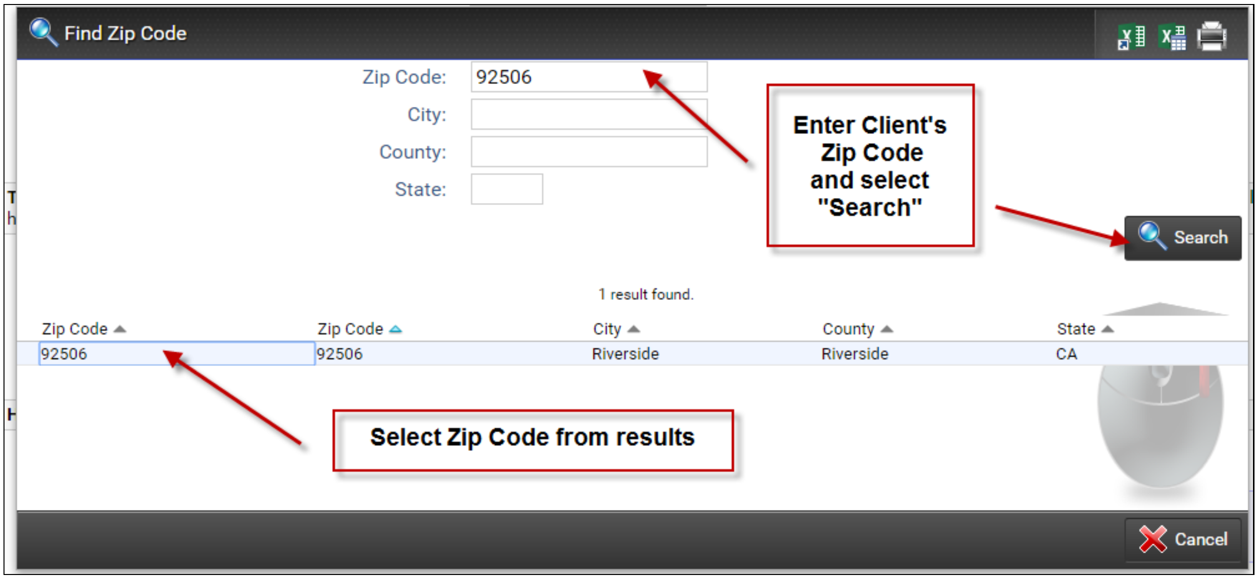


Prior Zip Code Information

- Click on the “Search” icon for pop-up window of zip codes



➢ Enter client's Zip Code
➢ Select "Search"
➢ Select Zip Code from list of results
➢ Zip Code, City & State will populate from your selection

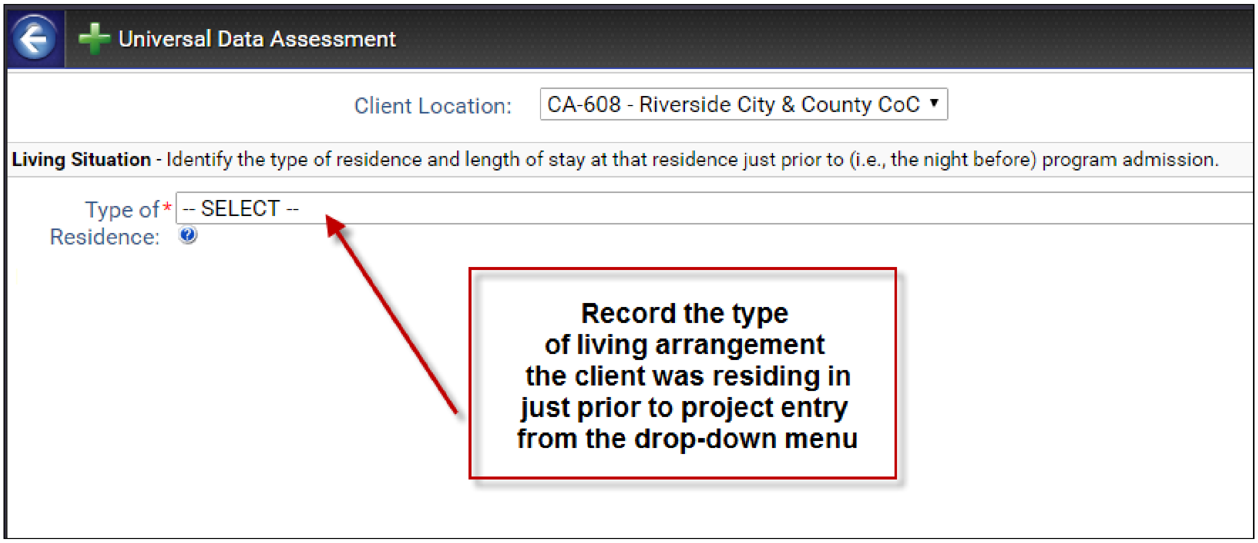


3.917A Living Situation

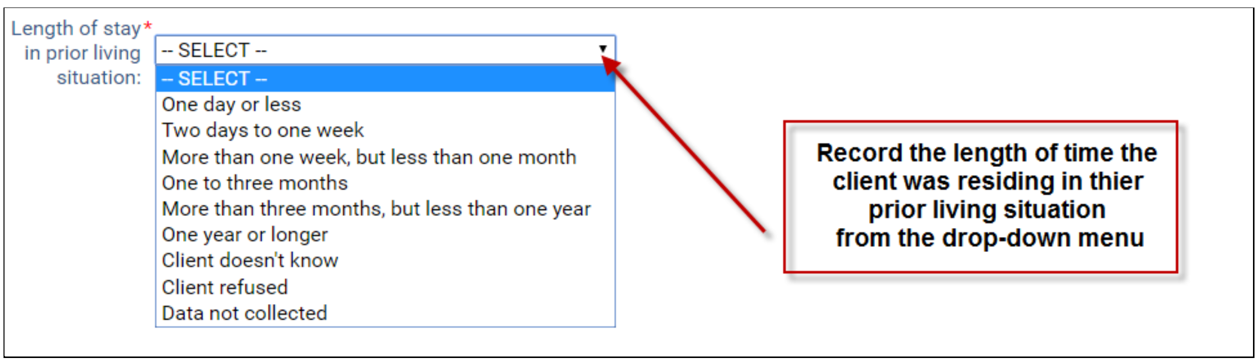
This element is used to identify the type of living situation and length of stay in that situation just prior to entry into an Emergency Shelter project for all adults and heads of households. This data, along with disabling condition is used to identify whether a client meets the criteria for chronic homelessness.

Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data.

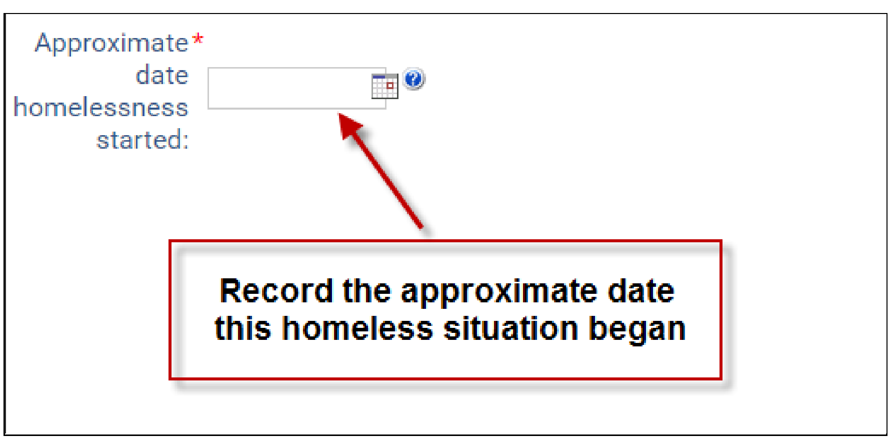
➢ Record the type of living arrangement of the head of household and each adult household member was residing in just prior to entry into the Street Outreach, ES, or SH project from the drop-down menu. The living situations have been divided into three different situations: Homeless; Institutional; and Transitional and Permanent Housing. *(Note - Adult members of the same household may have different prior living situations)*



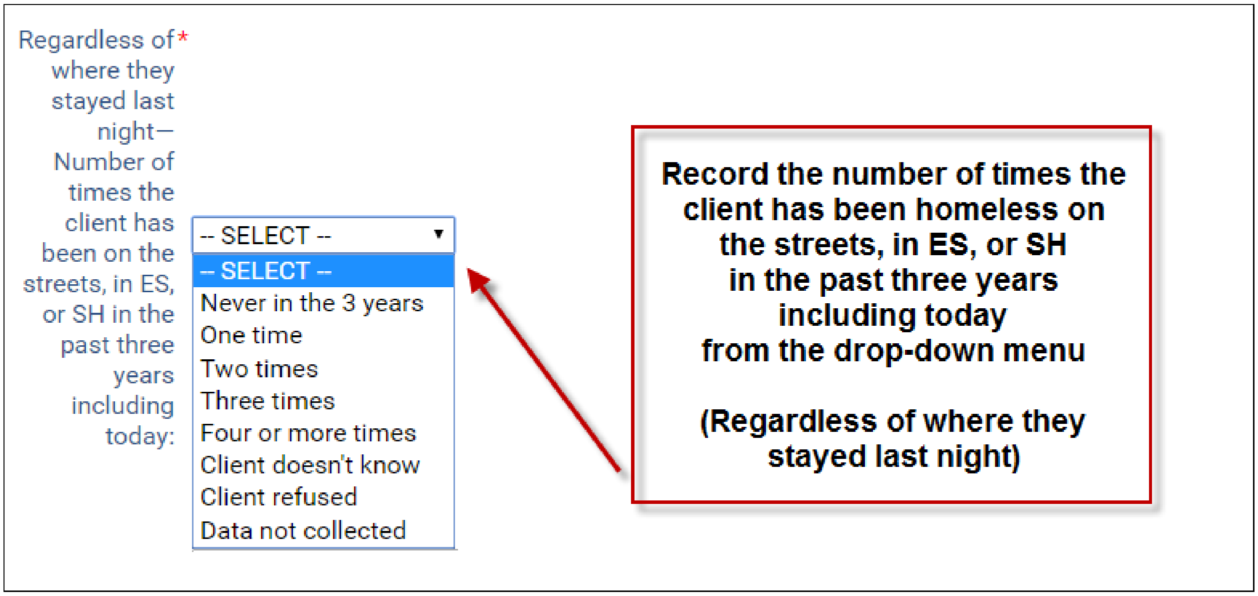
➢ Record the length of time the client was residing in their prior living situation from the drop-down menu.



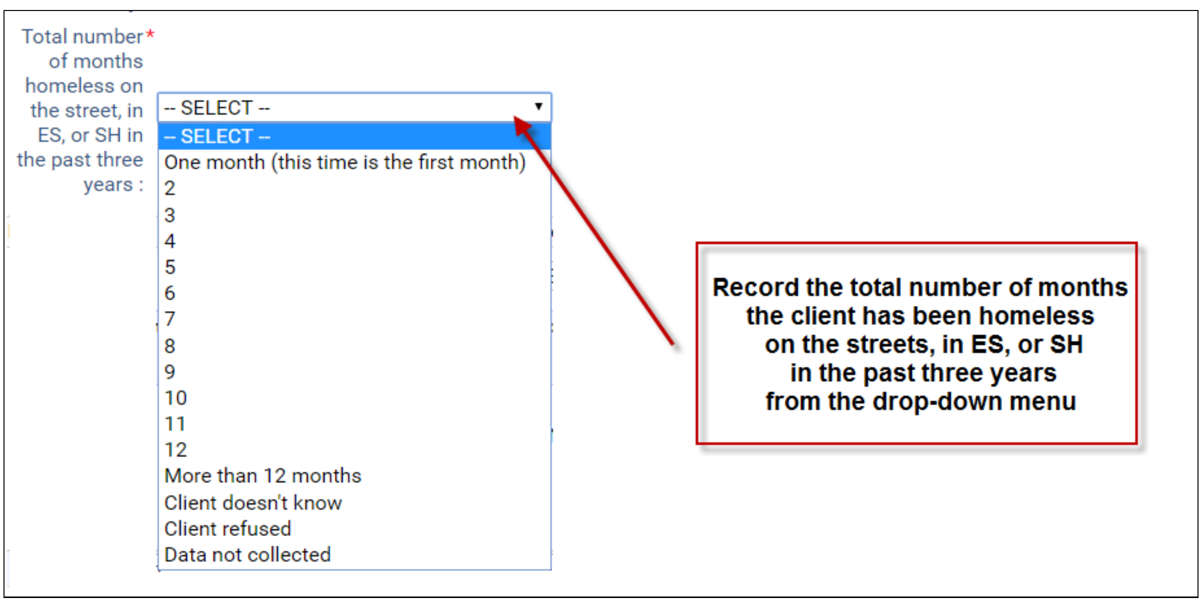
➢ Record the Approximate date this homeless situation began. Have the client look back to the date of the last time the client had a place to sleep that was not on the streets, ES, or SH and enter that date.



➢ Regardless of where the client stayed last night enter the **number of times** the client has been homeless on the streets, in ES, or SH in the past three years including today from the drop-down menu. *(Note – if this is the first time the client has been homeless in the past three years then the response is One Time)*



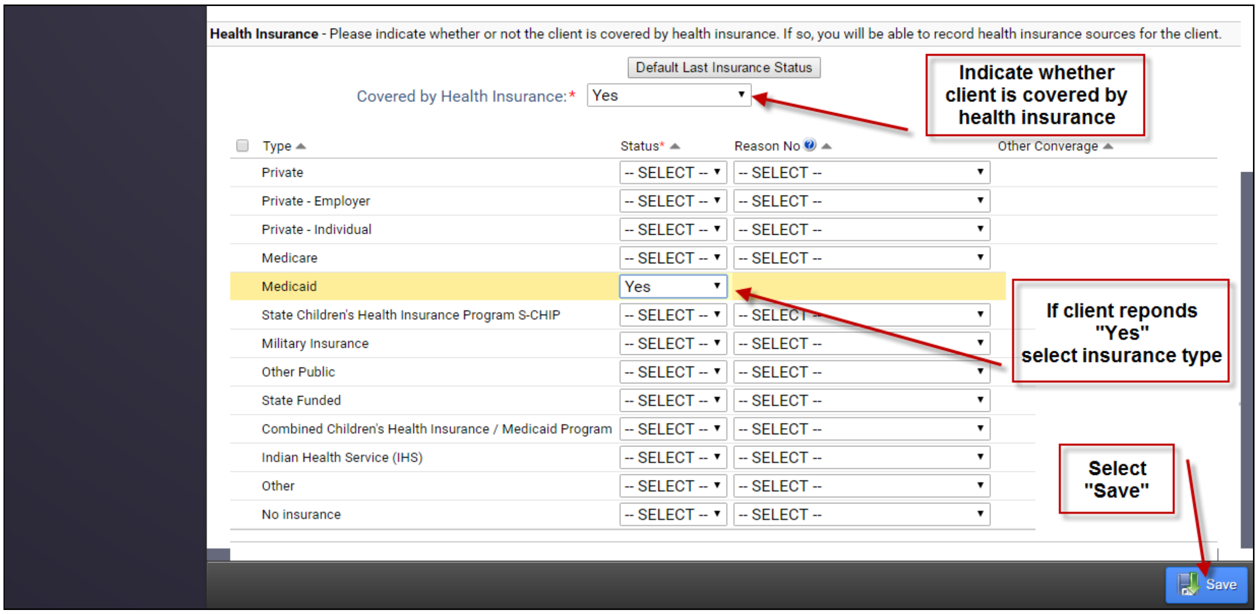
➢ Record the **total number of months** homeless the client has been on the streets, in ES or SH in the past three years from the drop-down menu. *(The number of cumulative, but not necessarily consecutive months spent homeless.)*



4.4 Health Insurance

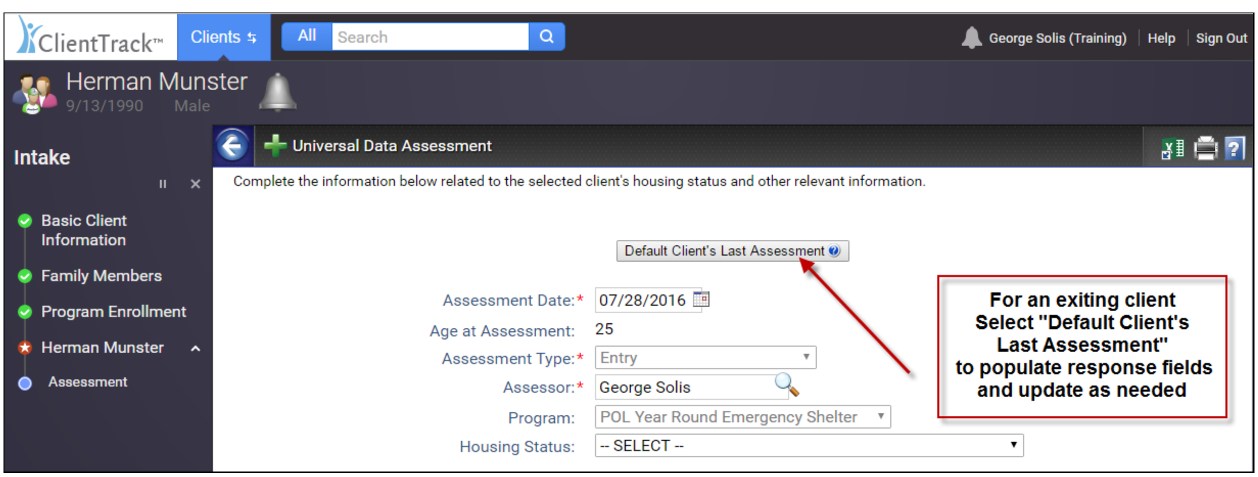
Health insurance information is important to determine whether clients currently have health insurance coverage and are accessing all mainstream project medical assistance benefits for which they may be eligible, and to ascertain a more complete picture of their economic circumstances.

- Indicate whether client is covered by health insurance
- If client responds "Yes" - select insurance type from menu list
- Select "Save"



Existing Client Record

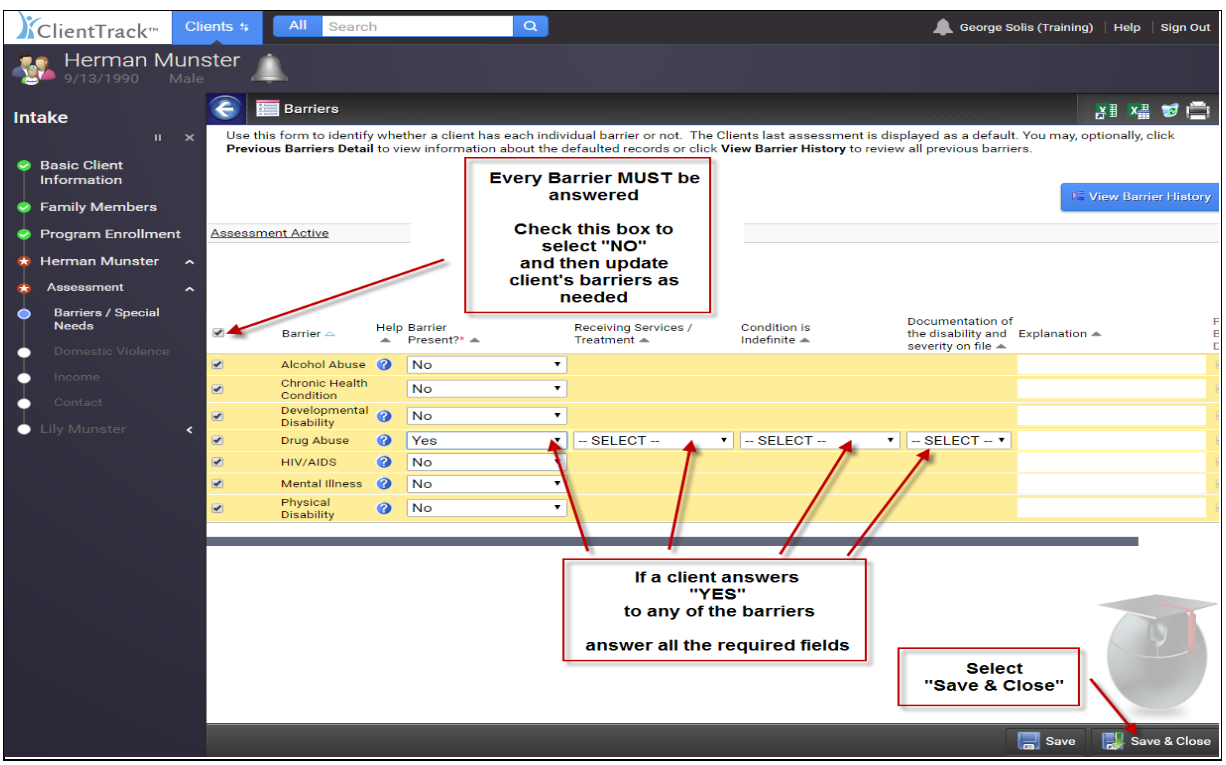
- Select "Default Client's Last Assessment" to populate response fields
- Update and verify client responses



Barriers

These data elements are used with other information to identify whether a client meets the criteria for chronic homelessness. Data collection assists in determining the total homeless population with developmental and physical disabilities, chronic health conditions, mental health problems, substance abuse or HIV/AIDS and assesses their needs for treatment or services.

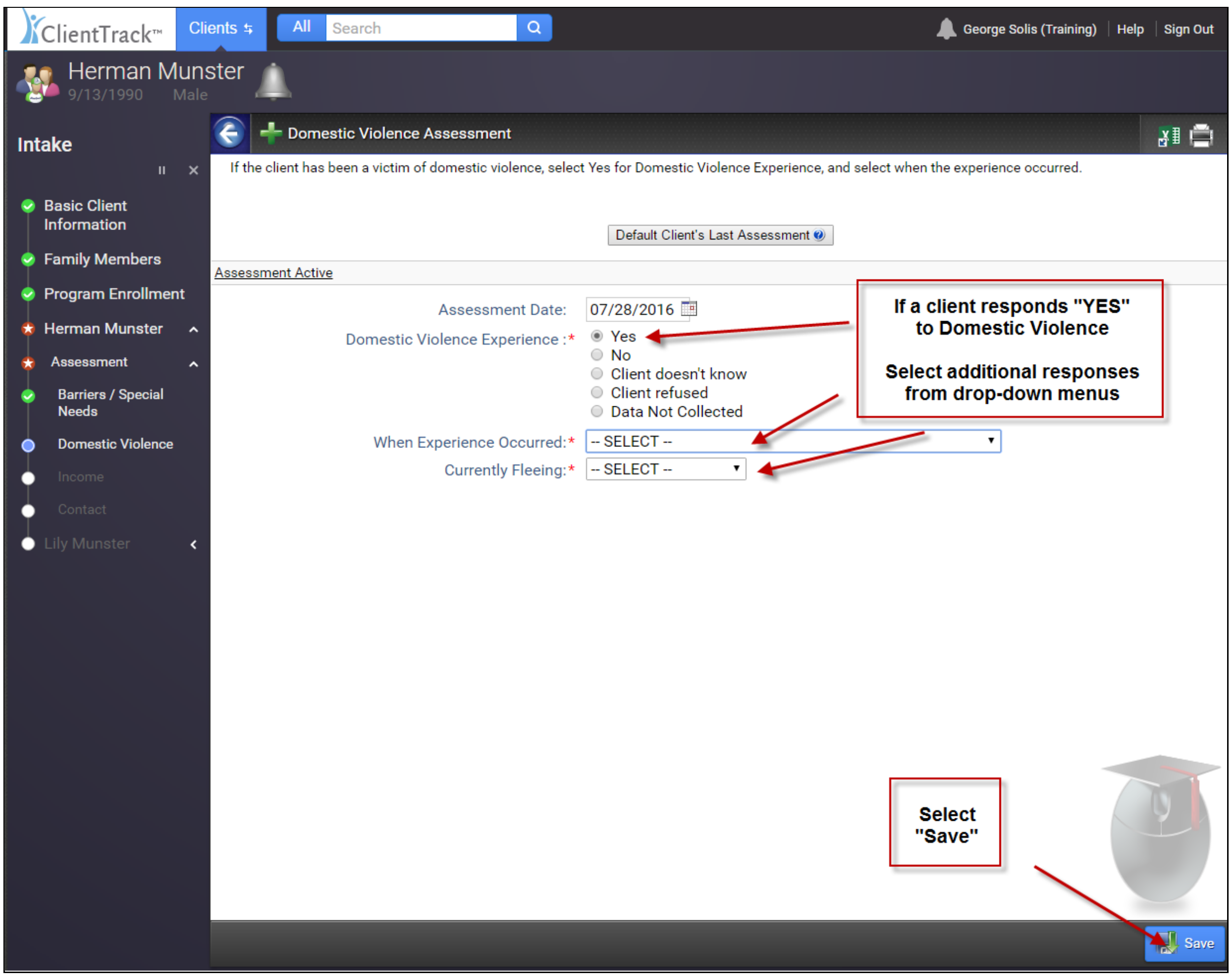
- A response must be recorded for every barrier
  - 4.10 Substance Abuse – Alcohol/ Drug
  - 4.7 Chronic Health Condition
  - 4.6 Developmental Disability
  - 4.8 HIV/AIDS
  - 4.9 Mental Health Problem
  - 4.5 Physical Disability
- Select box above list of barriers to select all barrier's; all response fields will be populated with "No"
- If a client responds "Yes" to any of the barriers, collect responses to the following fields:
  - Receiving Services/ Treatments
  - Condition is Indefinite
  - Documentation of the disability and severity on file
- Select "Save & Close"



4.11 Domestic Violence Assessment

Ascertaining whether a person is a victim of domestic violence is necessary to provide the person with the appropriate services to prevent further abuse and to treat the physical and psychological injuries from prior abuse. Also, ascertaining that a person may be experiencing domestic violence may be important for the safety of project staff and other clients. At the aggregate level, knowing the size of the population experiencing homelessness that has experienced domestic violence is critical for determining the resources needed to address the problem in this population.

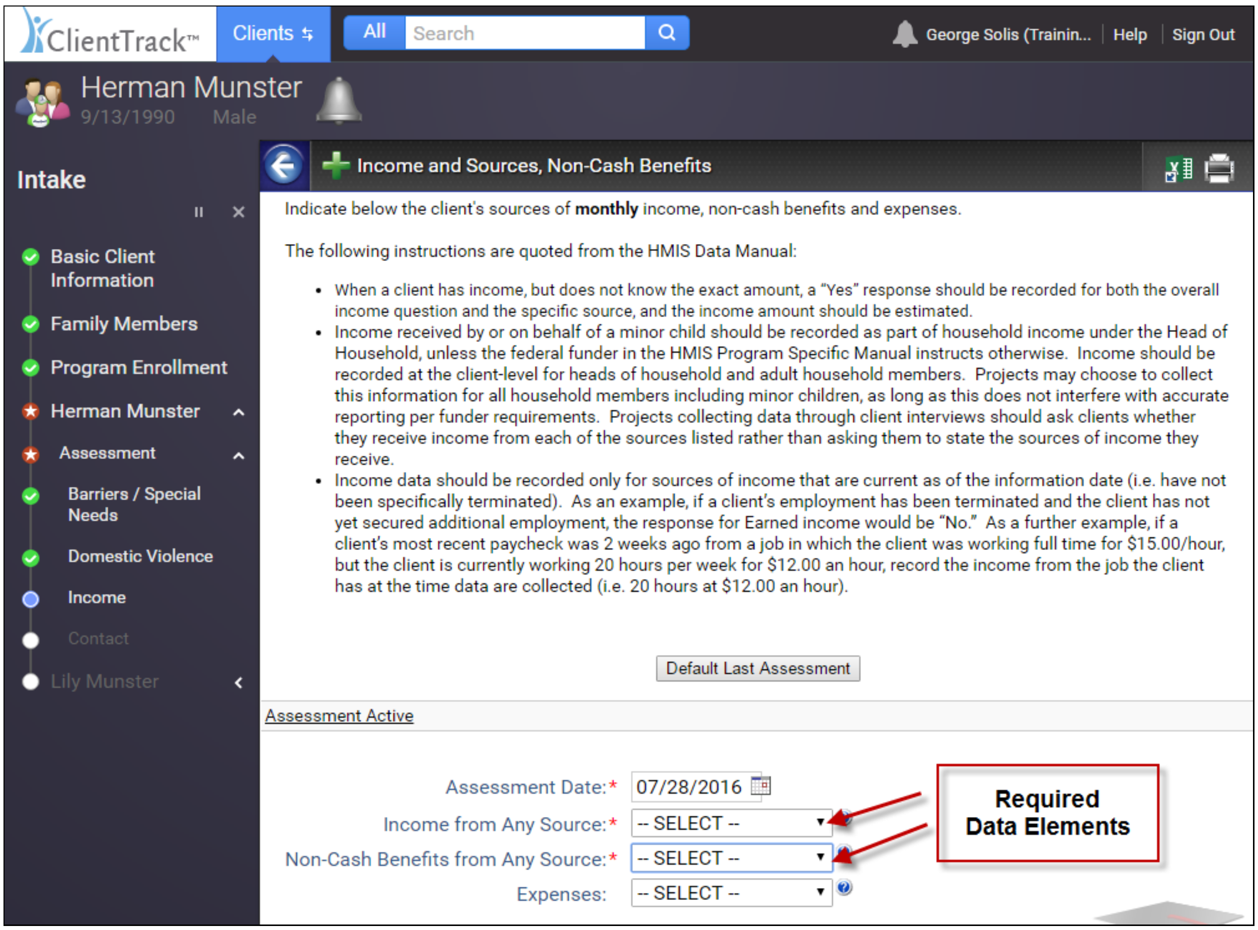
- Indicate whether client has ever experienced Domestic Violence
- If Client responds “Yes,” collect responses to the following fields:
  - When Experience Occurred
  - Currently Fleeing
- Select “Save”



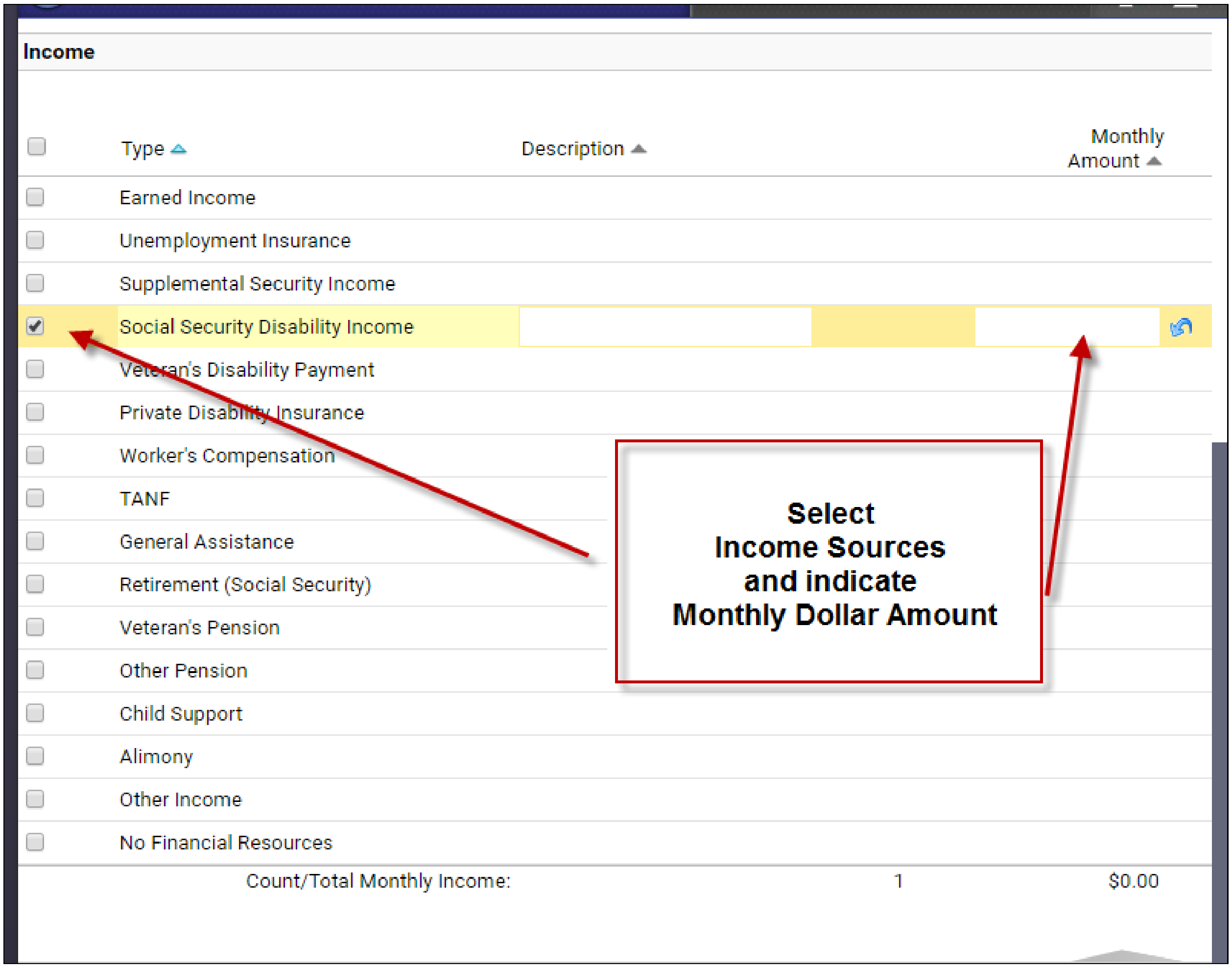
4.2 Income and Sources

Income and sources of income are important for determining service needs of people at the time of project entry, determining whether they are accessing all income sources for which they are eligible, describing the characteristics of the population experiencing homelessness, and allow analysis of changes in the composition of income between entry and exit from the project and annual changes prior to project exit. Increase in income is a key performance measure of most federal partner programs.

- Indicate whether client has income from any source from drop-down menu



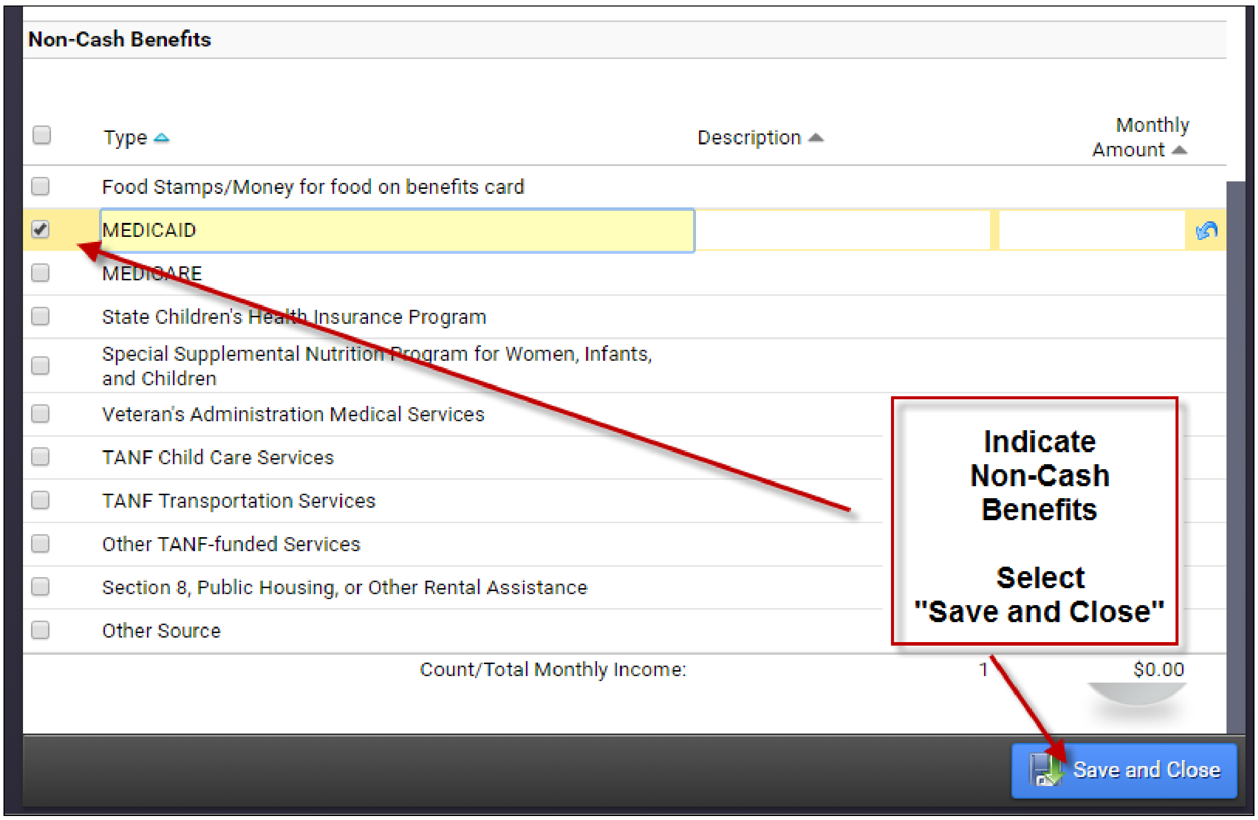
➢ If client responds "Yes," indicate all sources and dollar amounts from the list of income sources that apply



4.3 Non-Cash Benefits

Non-cash benefits are important to determine whether clients are accessing all mainstream program benefits for which they may be eligible and to develop a more complete picture of their economic circumstances.

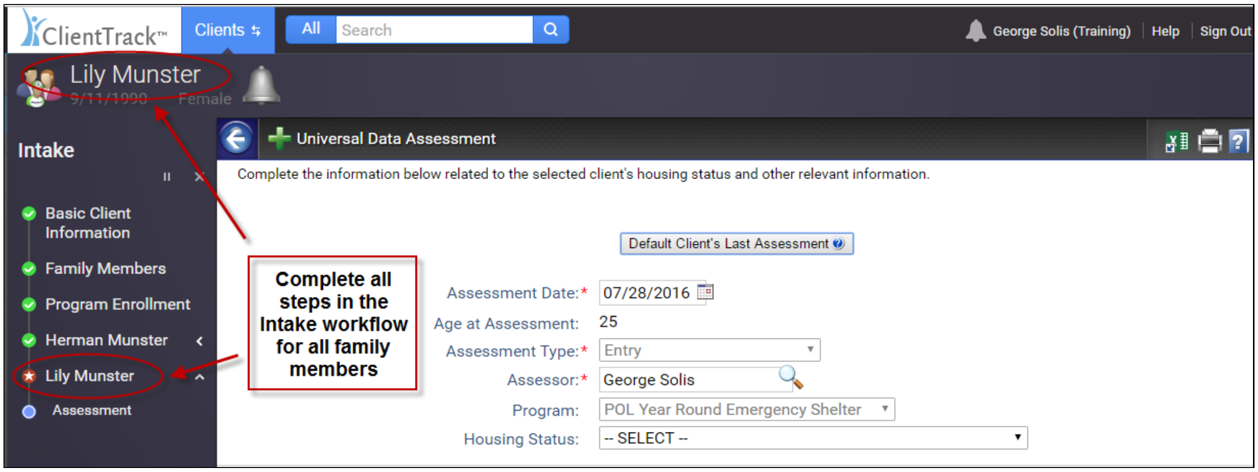
- Indicate whether client receives non-cash benefits from drop-down menu
- If client responds "Yes," indicate non-cash benefits from the list of sources that apply
- "Food Stamps/ Money for food on benefits card" is the only category that requires a monthly dollar amount
- Select "Save and Close"



Intake workflow for family members

Once you have completed the workflow for the Head of the Household, the Intake workflow will start over for the next family member.

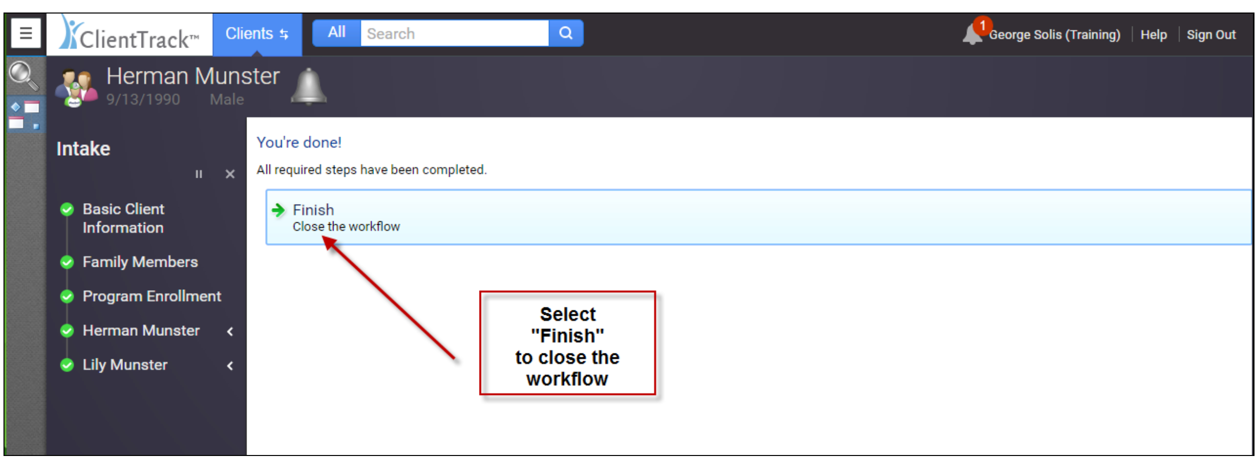
- Complete all steps in the Intake workflow for all family members



Completion of Intake

The intake is complete once all family members' workflows have been completed.

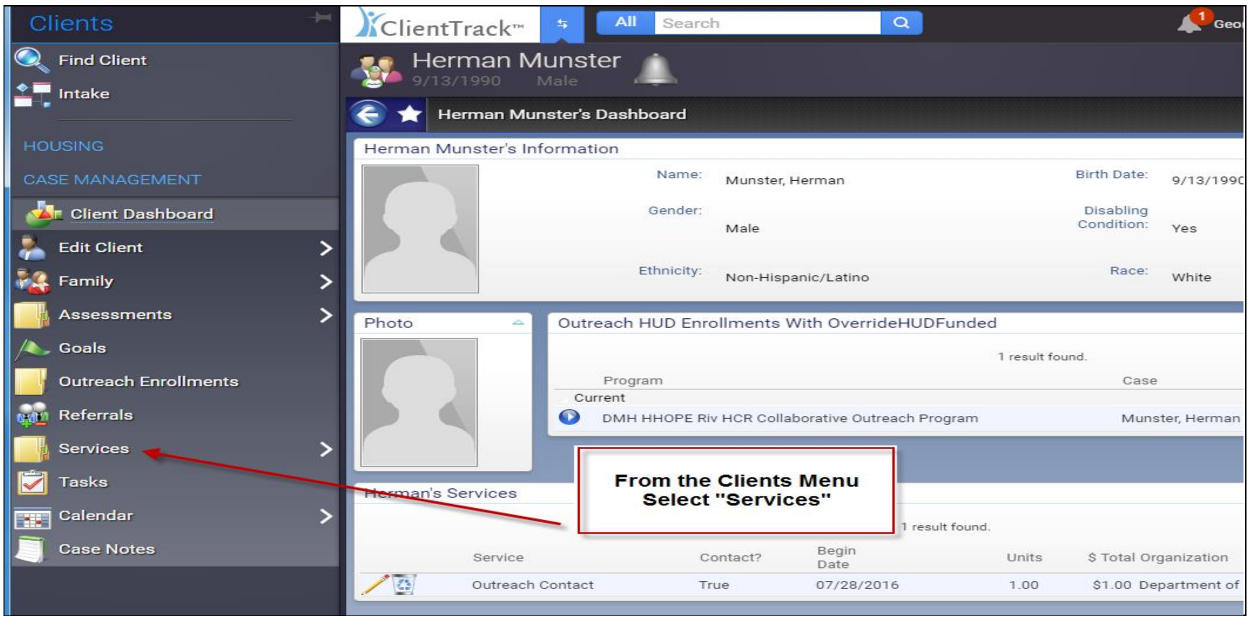
- Select "Finish" to close the workflow



Recording Services

Projects can record services that were provided to clients during project participation. Services should be recorded for the individual client to whom they were provided; a service that benefited the whole household may be recorded solely for the head of the household. For each service provided, projects should record the service date and service type.

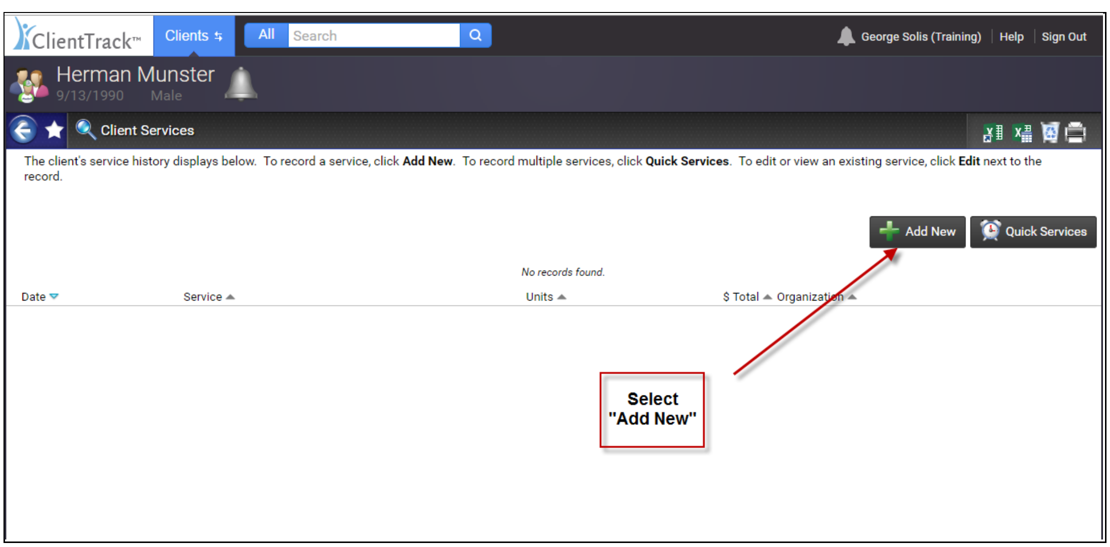
- Select “Services” from the Clients Menu to navigate to the Client Services screen



Note: The Clients Services Screen can also be accessed by clicking on Services from the Client’s Dashboard

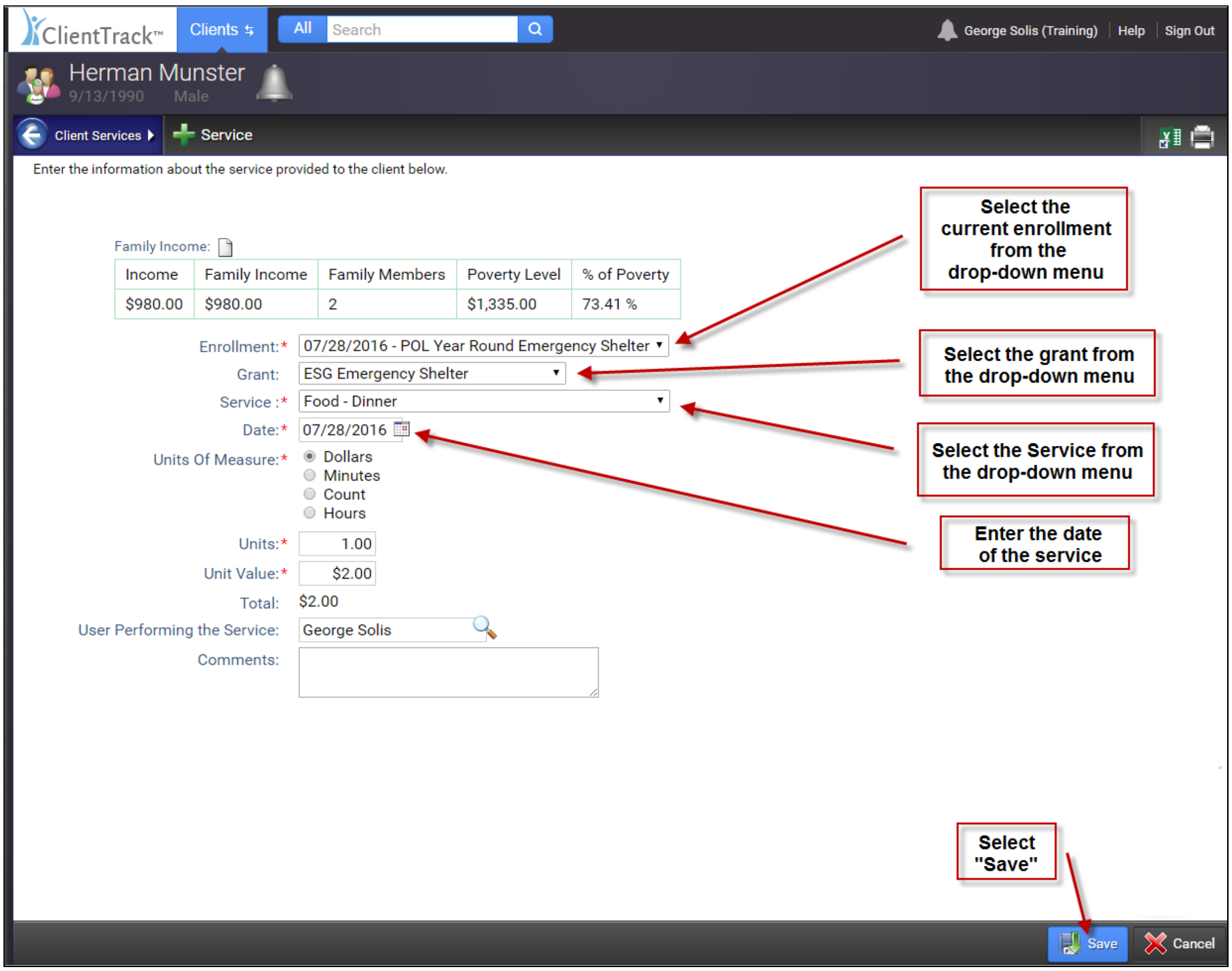
Clients Services Screen

- Select “Add New”



Service Screen

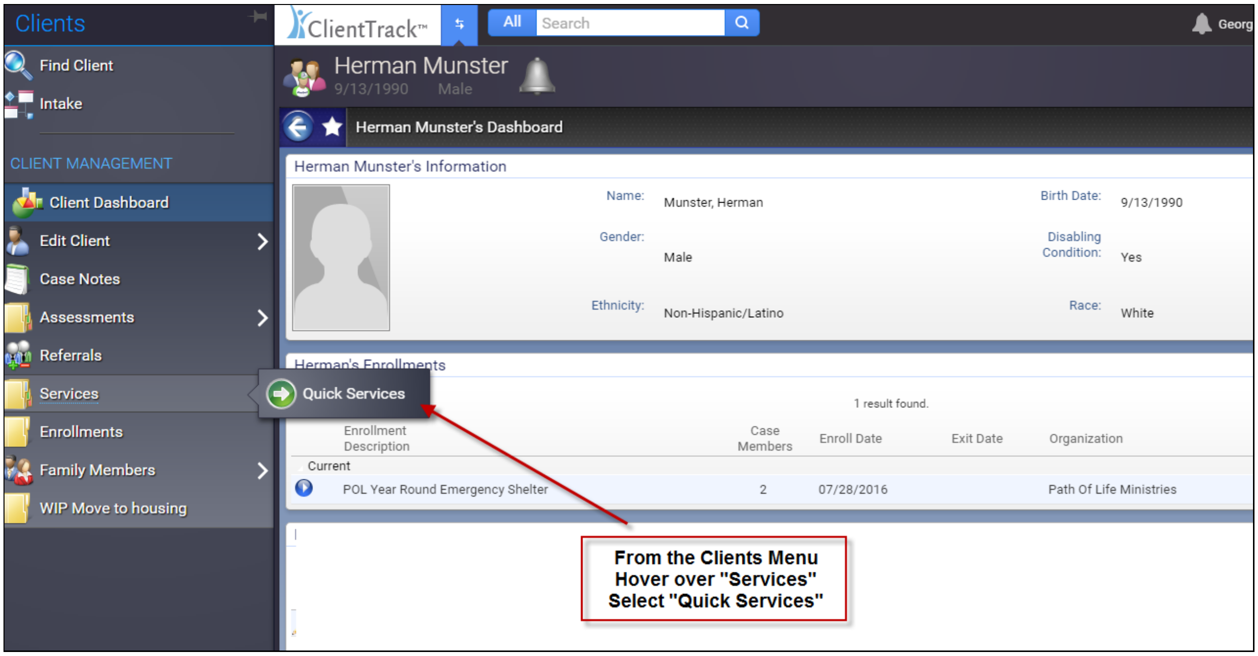
- Select the current enrollment from the drop-down menu to link the service with the appropriate enrollment
- Select the grant from the drop-down menu to link the service with the appropriate grant
- Select the service from the drop-down menu
- Enter the service date
- Verify Units of Measure, Units and Units Value
- Enter comments if applicable
- Select "Save"



Recording Multiple Services

Utilizing “Quick Services” is an expedient way to record multiple services for a client that occurred on the same day, rather than recording one service at a time.

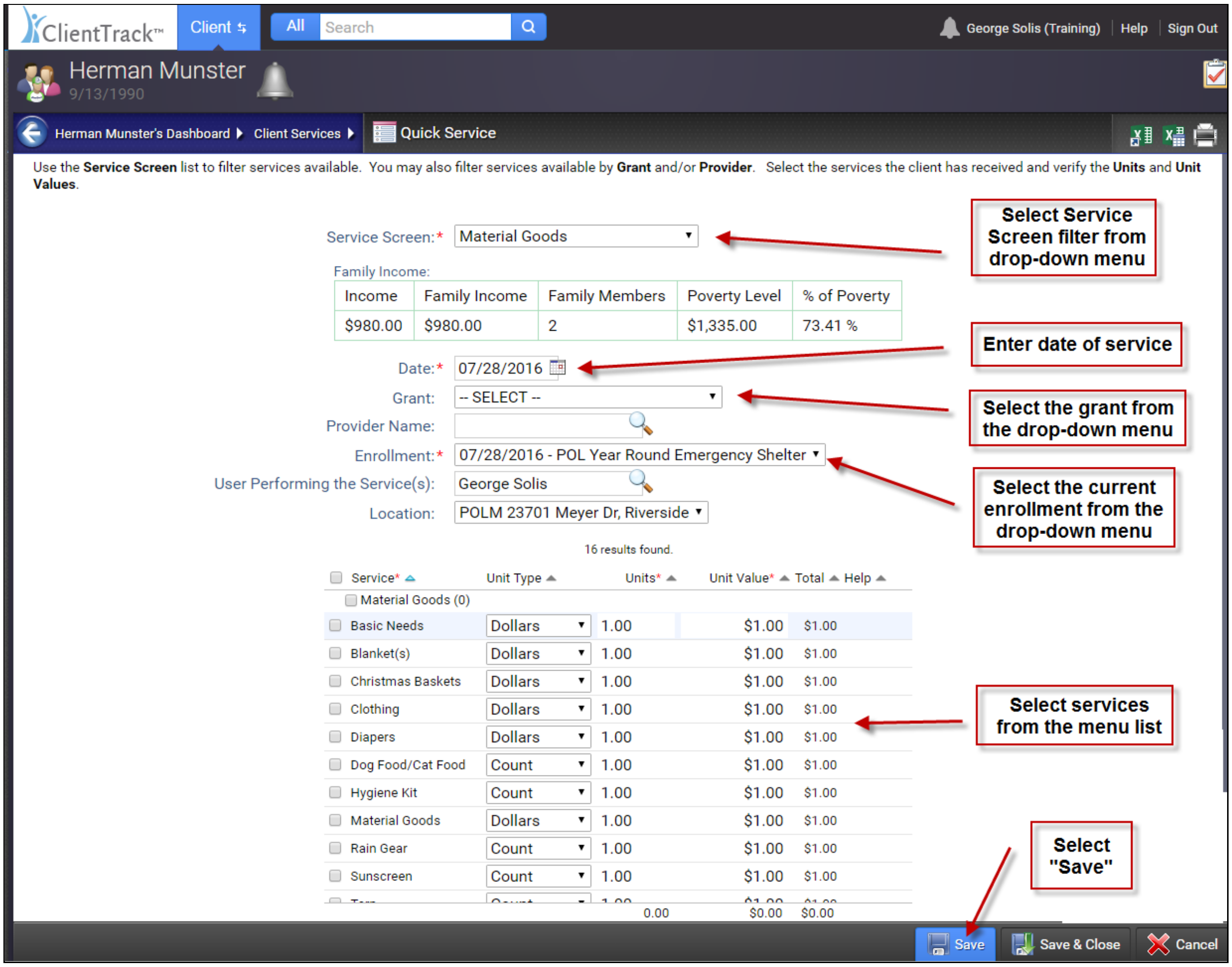
- ➢ Hover over “Services” from the Clients Menu
- ➢ Select “Quick Services” to navigate to the Quick Services screen



Note: Quick Services can also be accessed by clicking on Quick Services from the Client Services Screen

Quick Service Screen

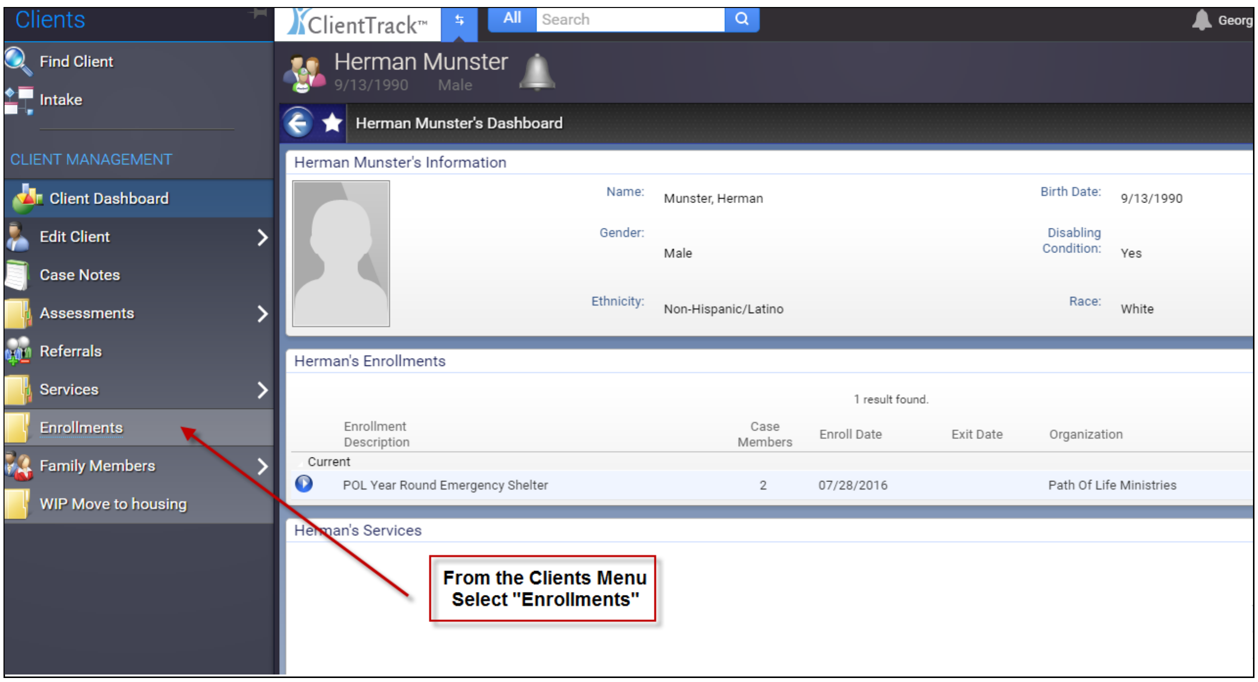
- ➢ Select the appropriate Service Screen Filter from the Service Screen drop-down menu to populate a list of services by category
- ➢ Enter the date of the service(s)
- ➢ Select the grant from the drop-down menu to link the service(s) with the appropriate grant
- ➢ Select the current enrollment from the drop-down menu to link the service(s) with the appropriate enrollment
- ➢ Record each service provided to the client by checking the checkbox next to the particular service
- ➢ Verify Unit Type, Units and Unit Value
- ➢ When finished recording services corresponding to the parameters entered at the top of the page, Select “Save”
- ➢ To record services provided under a different set of parameters, repeat steps above
- ➢ When finished recording all services, Select “Save & Close”


ClientTrack
Client
All
Search
George Solis (Training)
Help
Sign Out
Herman Munster
9/13/1990
Herman Munster's Dashboard
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:* Material Goods
Family Income:
Income | Family Income | Family Members | Poverty Level | % of Poverty
$980.00 | $980.00 | 2 | $1,335.00 | 73.41 %
Date:* 07/28/2016
Grant: -- SELECT --
Provider Name:
Enrollment:* 07/28/2016 - POL Year Round Emergency Shelter
User Performing the Service(s): George Solis
Location: POLM 23701 Meyer Dr, Riverside
16 results found.
Service* | Unit Type | Units* | Unit Value* | Total | Help
Material Goods (0)
Basic Needs | Dollars | 1.00 | $1.00 | $1.00
Blanket(s) | Dollars | 1.00 | $1.00 | $1.00
Christmas Baskets | Dollars | 1.00 | $1.00 | $1.00
Clothing | Dollars | 1.00 | $1.00 | $1.00
Diapers | Dollars | 1.00 | $1.00 | $1.00
Dog Food/Cat Food | Count | 1.00 | $1.00 | $1.00
Hygiene Kit | Count | 1.00 | $1.00 | $1.00
Material Goods | Dollars | 1.00 | $1.00 | $1.00
Rain Gear | Count | 1.00 | $1.00 | $1.00
Sunscreen | Count | 1.00 | $1.00 | $1.00
0.00 | $0.00 | $0.00
Save
Save & Close
Cancel
Select Service Screen filter from drop-down menu
Enter date of service
Select the grant from the drop-down menu
Select the current enrollment from the drop-down menu
Select services from the menu list
Select "Save"

Annual Assessment

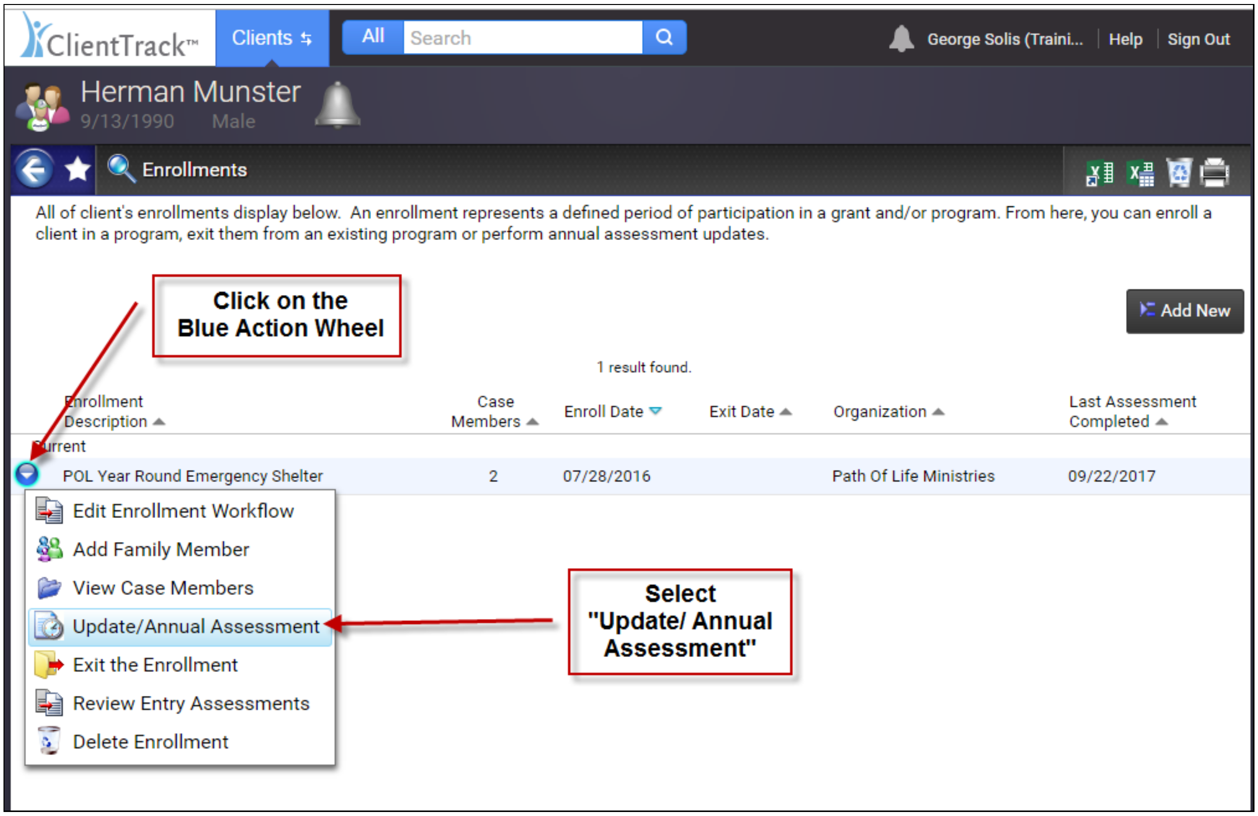
Data collection must include an annual assessment for all persons in a project one year or more. The annual assessment is a specialized subset of the 'update' collection point. The annual assessment must be recorded no more than 30 days before or after the anniversary of the client's **Project Entry Date**, regardless of the date of the most recent 'update' or 'annual assessment.' Regardless of whether the responses have changed since project entry or the previous annual assessment, a new record must be created for each subsequent annual assessment such that it is possible to view a history, by date, of the values for each data element.

- Select "Enrollments" from the Clients Menu to navigate to the Enrollments screen



Enrollments Screen

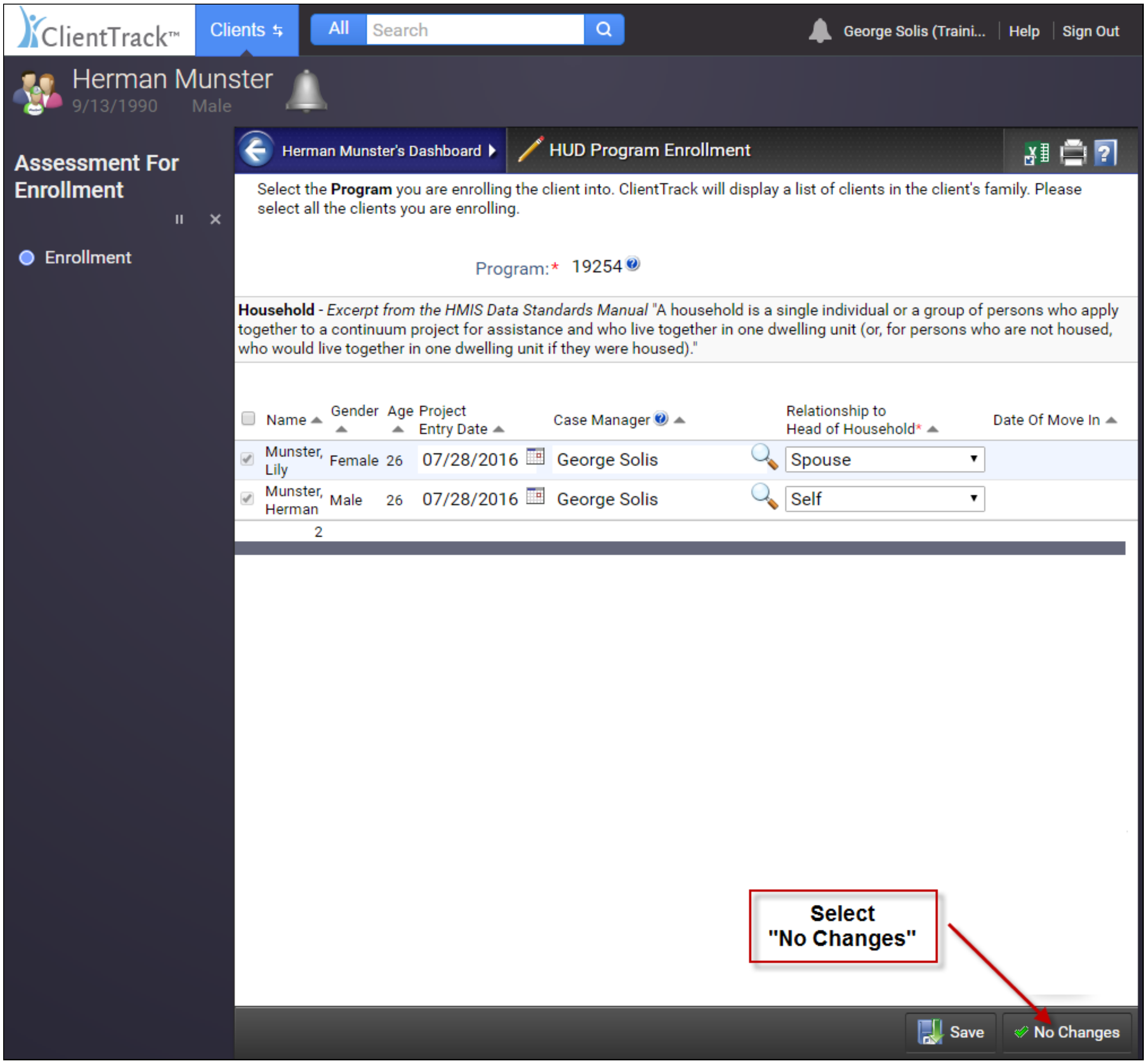
- ➢ Click on the Blue Action Wheel
- ➢ Select "Update/ Annual Assessment"



Note: You can also access the Annual Assessment by clicking on the Blue Action Wheel from the Client's Dashboard

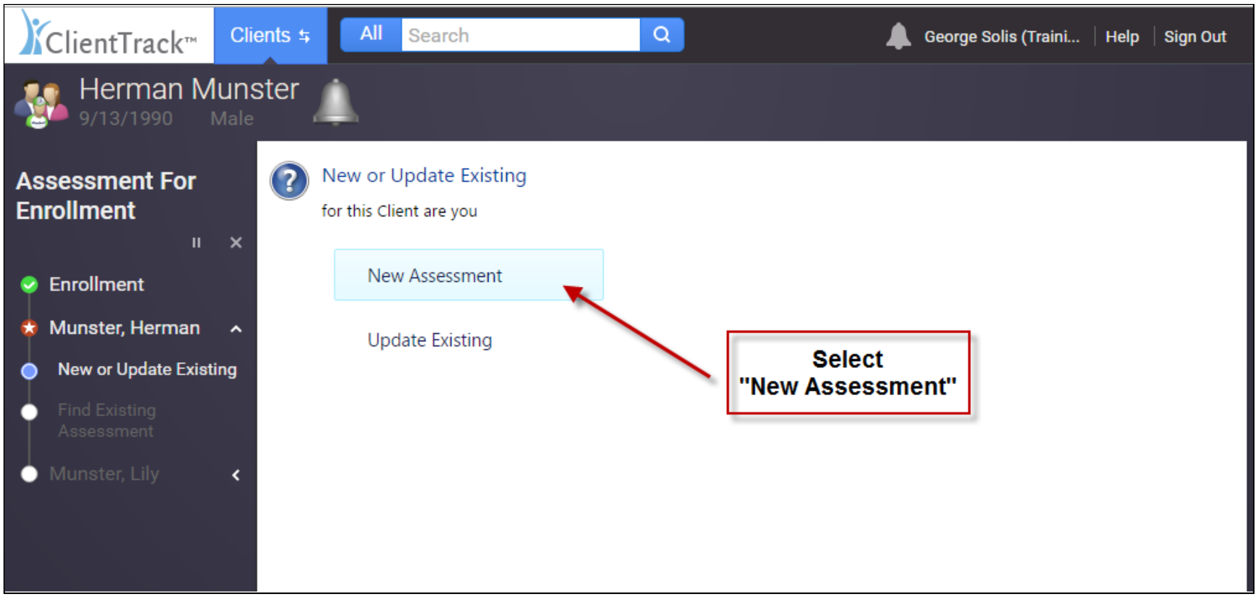
Assessment for Enrollment Screen

- Select "No Changes"



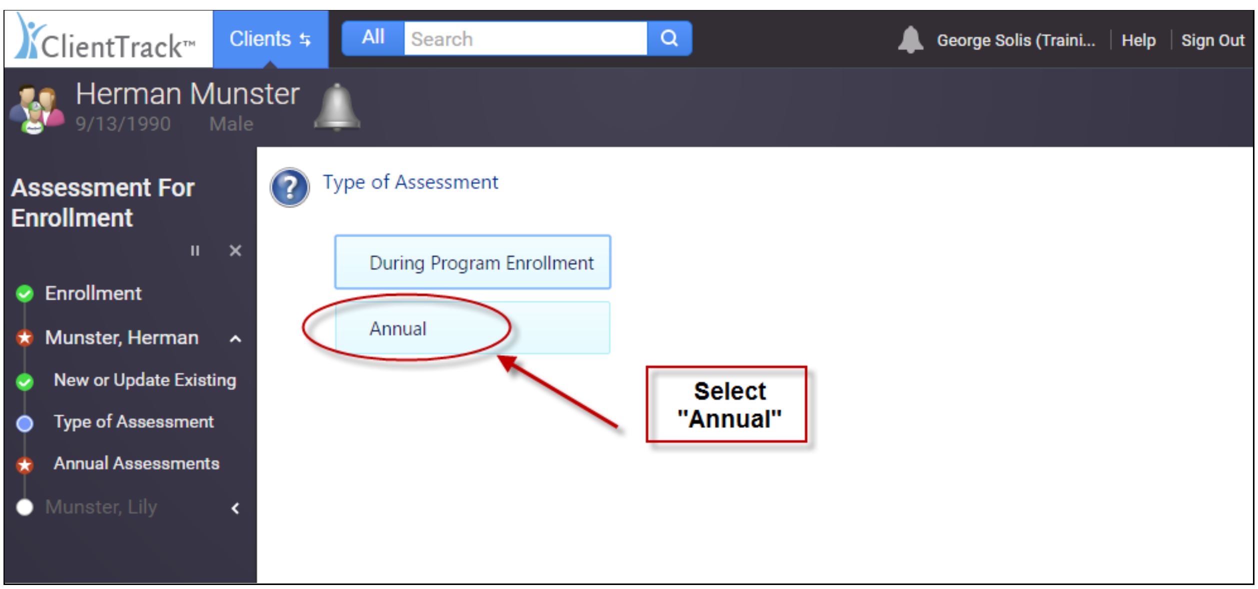
New or Update Existing

- ➢ Select "New Assessment"



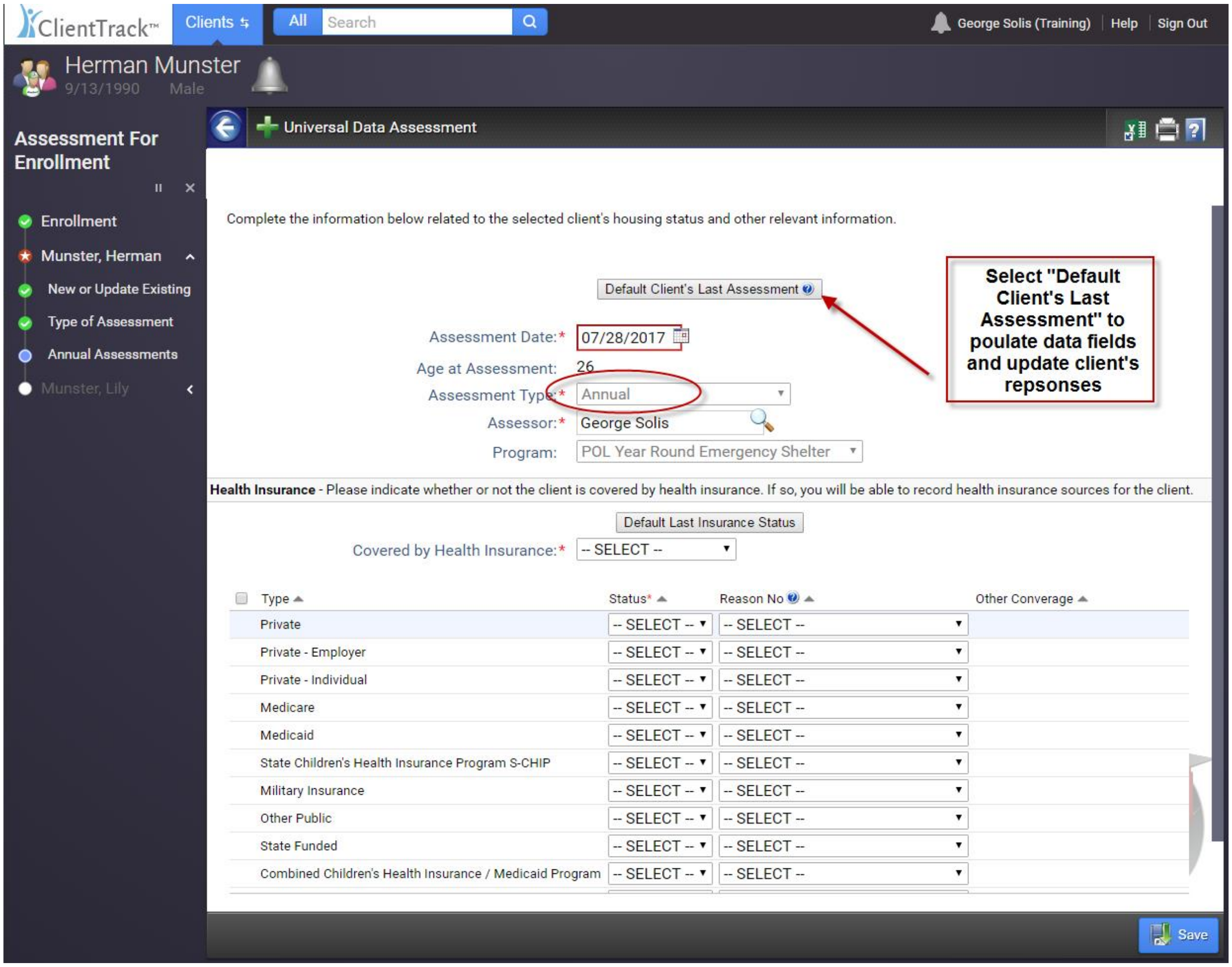
Type of Assessment

- ➢ Select "Annual"



Universal Data Assessment

- ➢ Select “Default Client’s Last Assessment” to populate the data fields
- ➢ Update client’s reponses for data collection

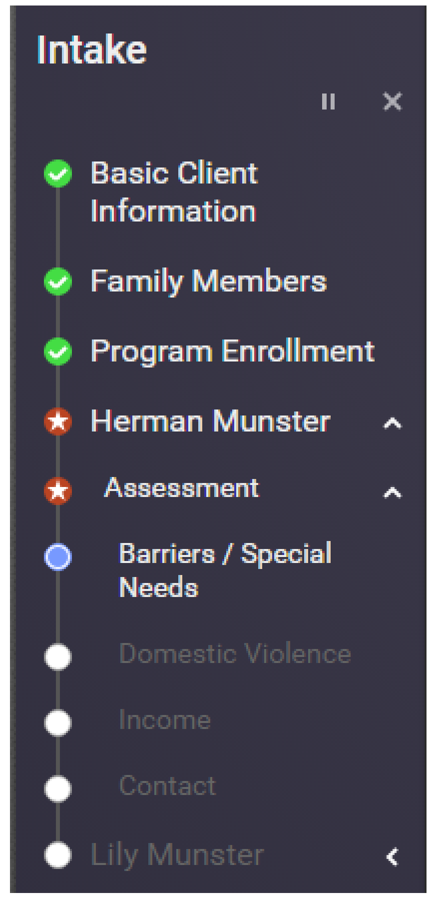


- ➢ Complete all steps in the Assessment workflow
  - o 4.4 Health Insurance
  - o 4.10 Substance Abuse – Alcohol/ Drug
  - o 4.7 Chronic Health Condition
  - o 4.6 Developmental Disability
  - o 4.8 HIV/AIDS
  - o 4.9 Mental Health Problem
  - o 4.5 Physical Disability
  - o 4.11 Domestic Violence
  - o 4.2 Income and Sources
  - o 4.3 Non-Cash Benefits
- ➢ Select “Finish” to close the workflow

Workflow Navigation

During the workflow process, a left-hand navigation highlights your progress in the workflow.

- Green Check Mark = Completed
- Red Star = Current Family Member
- Blue Circle = Current screen
- White Circle = Not Completed



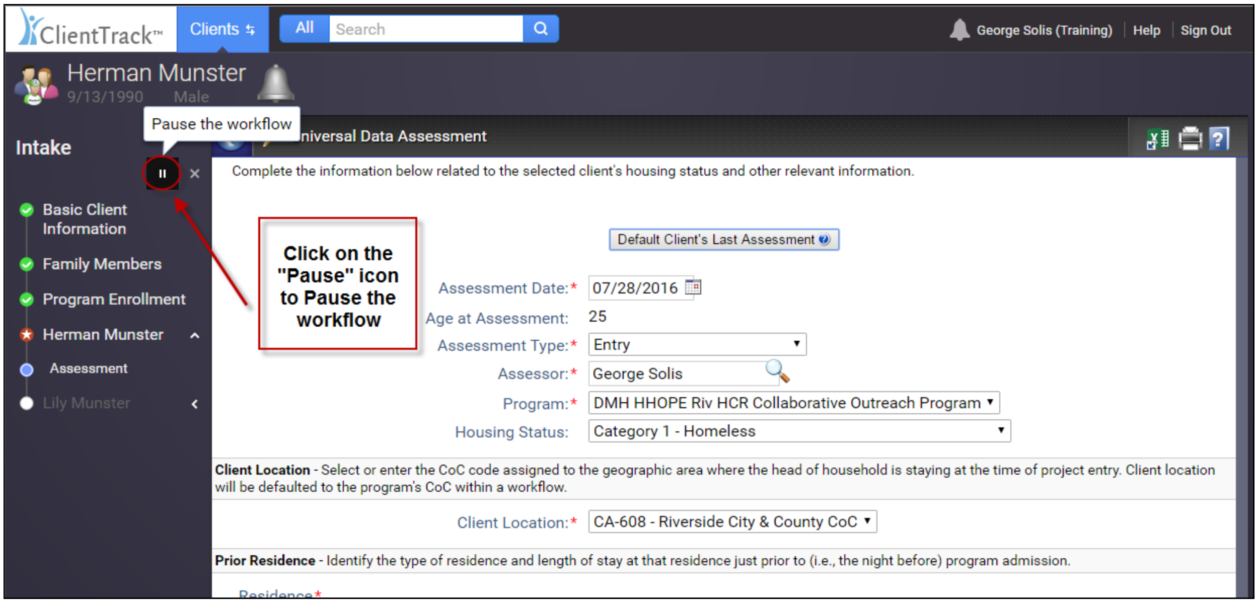
You can navigate backwards to any completed screen; however you cannot navigate forward until the current screen is completed.

Paused Workflows

When completing a workflow, you can pause the process and return to it at a later point in time to complete the process. The workflow will resume where you left off.

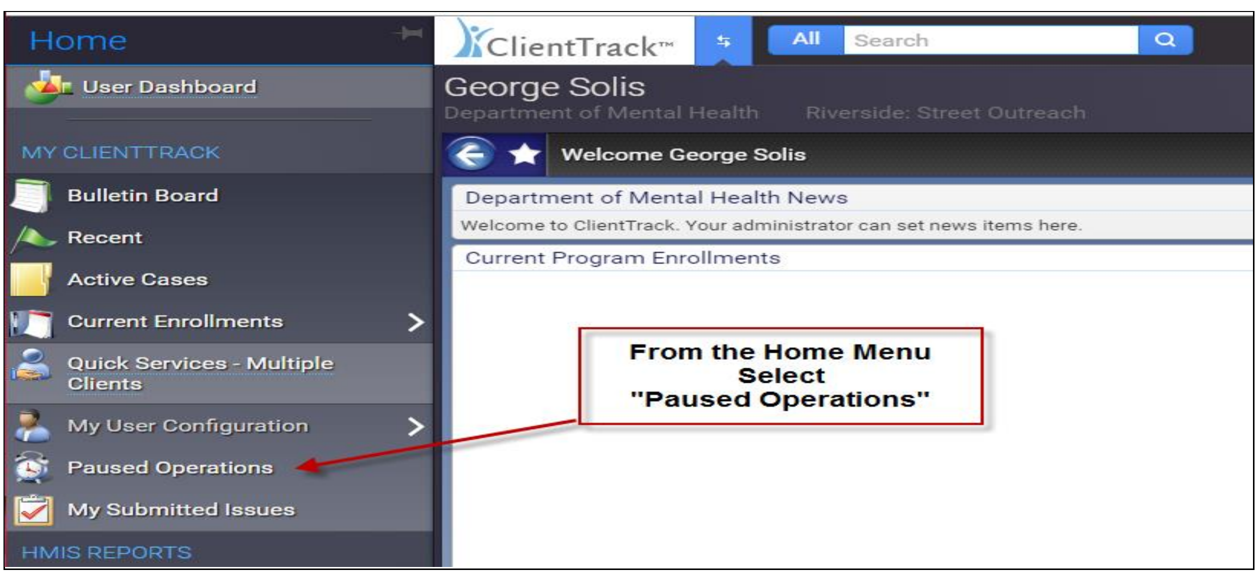
Pause the Workflow

- Click on the "Pause" icon to pause the workflow



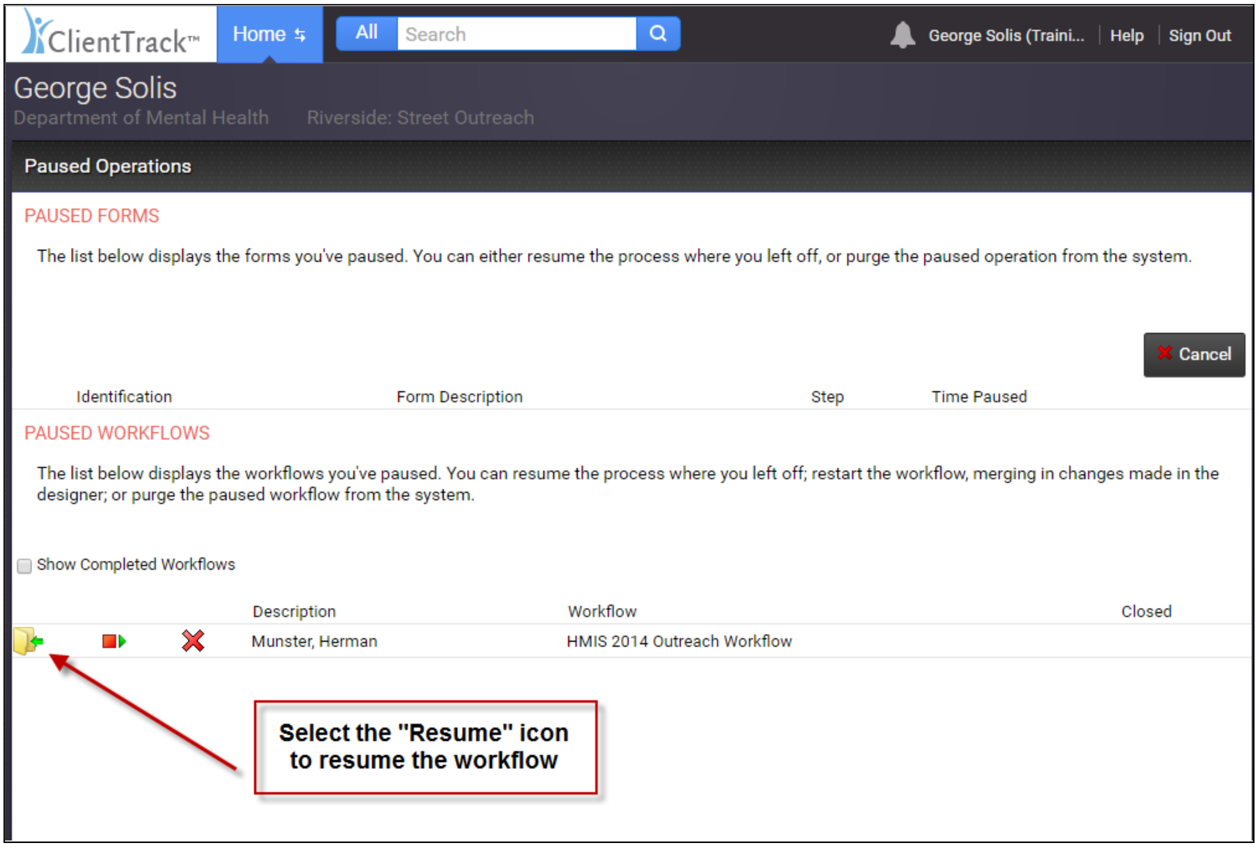
Resume a Workflow

- Select "Paused Operations" from the Home Menu



Paused Operations

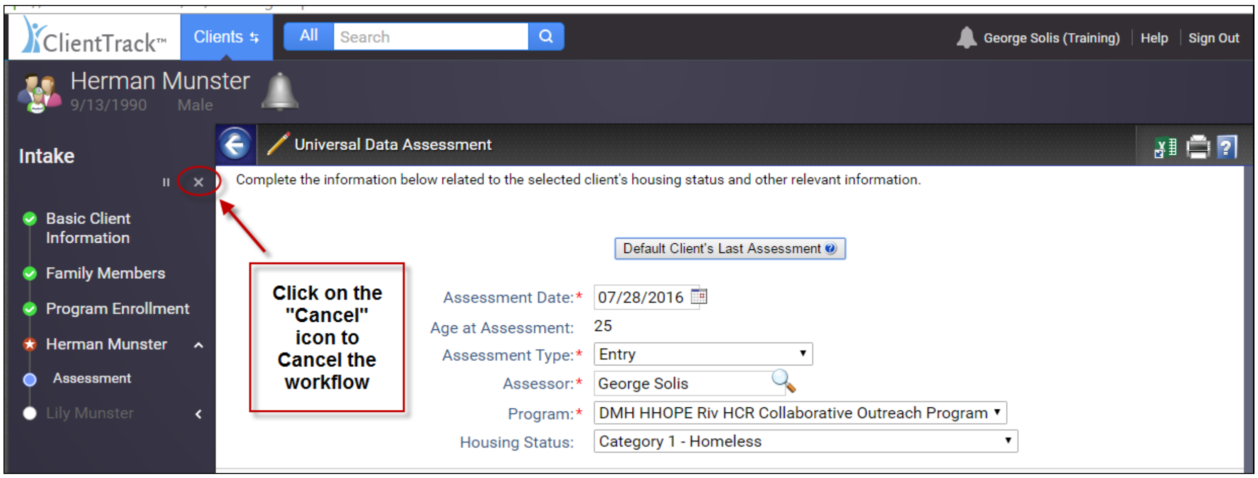
- Select the “Resume” icon to resume the workflow



Cancel the Workflow

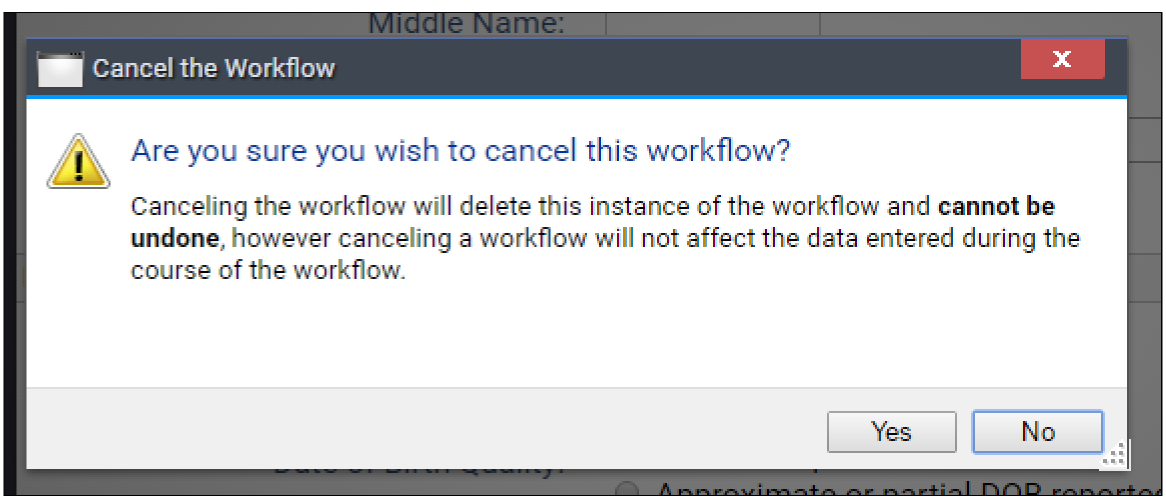
When completing a workflow, you can cancel the workflow process at any point, however cancelling a workflow will not affect the data already entered and saved during the course of the workflow.

➢ Click on the "Cancel" icon on the left hand navigation to cancel the workflow



Cancelling the workflow **cannot be undone**. A warning message will appear prior to the cancellation.

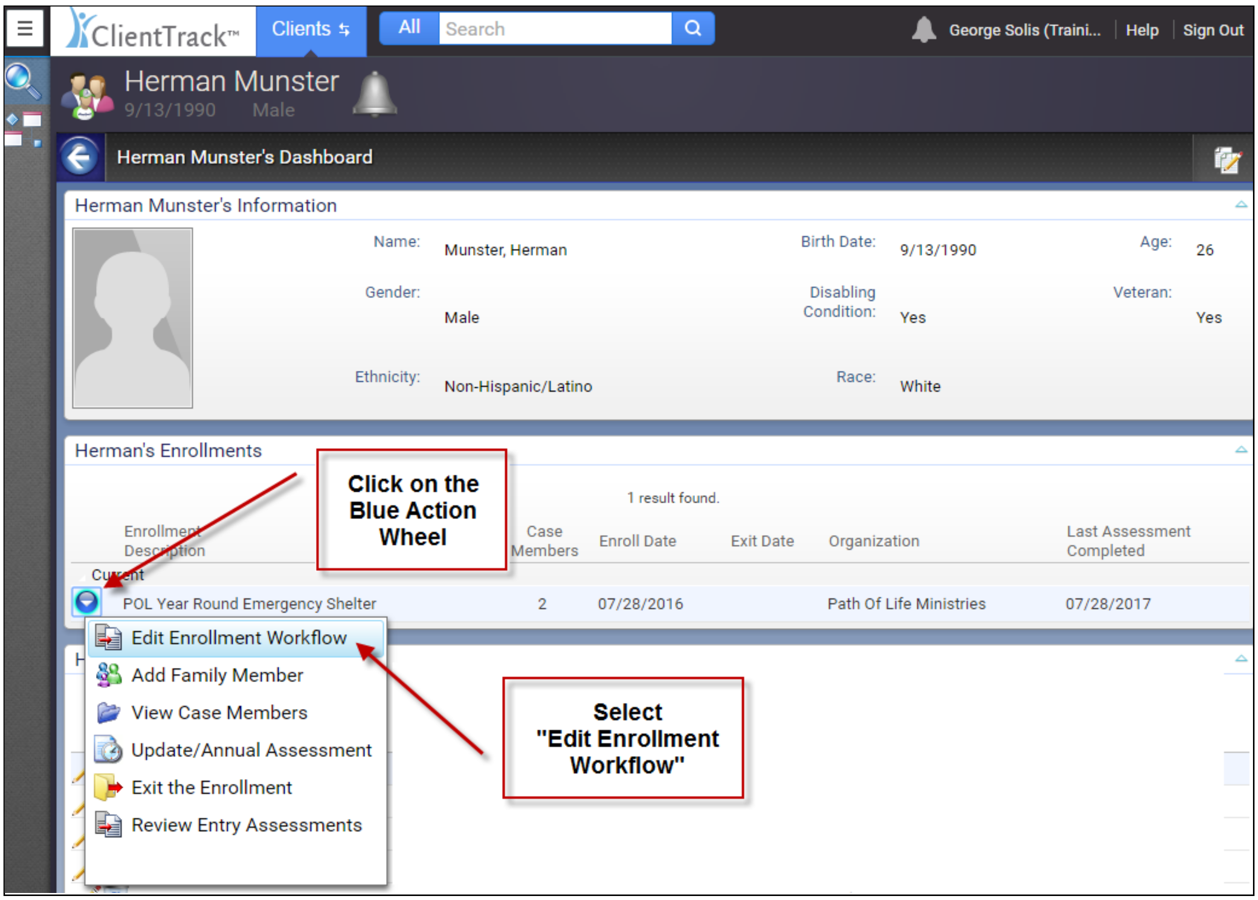
➢ Select "Yes" or "No" to proceed with the cancellation



Edit the Enrollment

You can edit the data responses in a client's enrollment if needed. This is particularly important when updating any missing data elements to improve data quality issues.

- Click on the Blue Action Wheel from the Client's Dashboard
- Select "Edit Enrollment Workflow"
- Navigate through the workflow to get to the necessary screen
- Select "No Changes" or "Skip" to move to the next screen
- Select "Save" on the screen where you edited any data responses
- "Cancel" the workflow once changes have been saved (see cancel the workflow above)

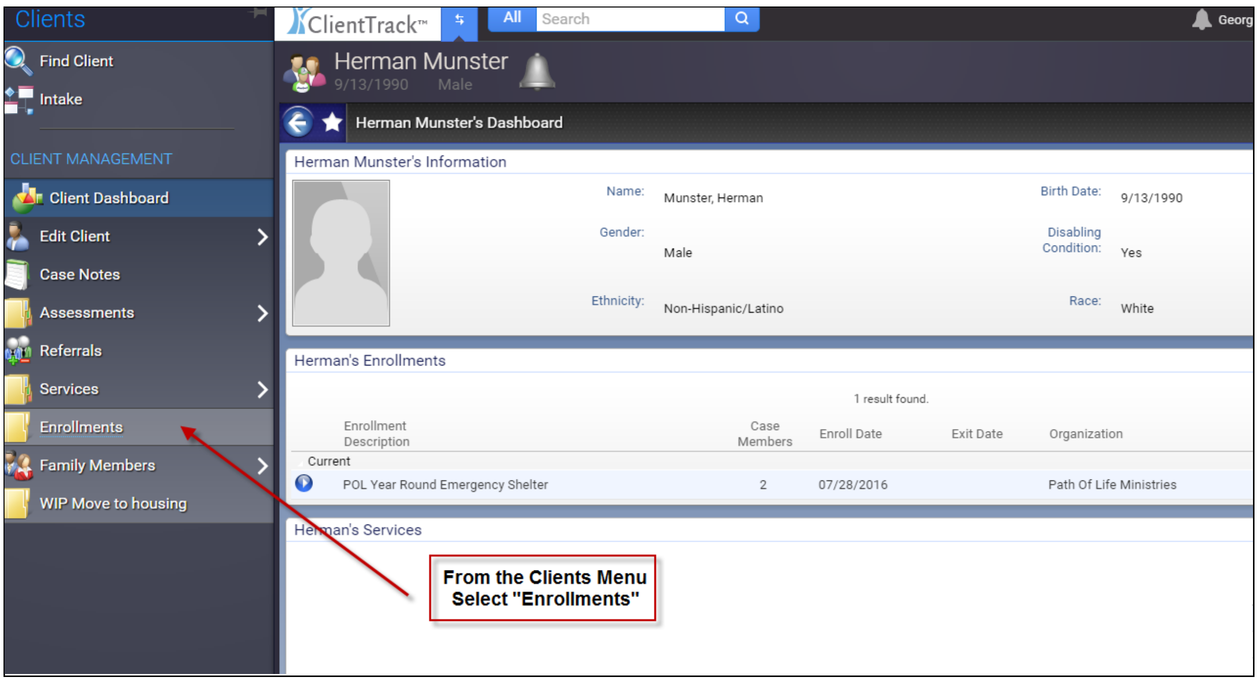


Exit the Enrollment

An Enrollment Exit needs to be completed once a client is no longer considered a project participant. It is important to exit clients in a timely manner because this affects the client's Length of Stay. Length of stay is a measurement of the total number of days the client has been enrolled in a program and is an important assessment of your program's ability to move the client out of homelessness.

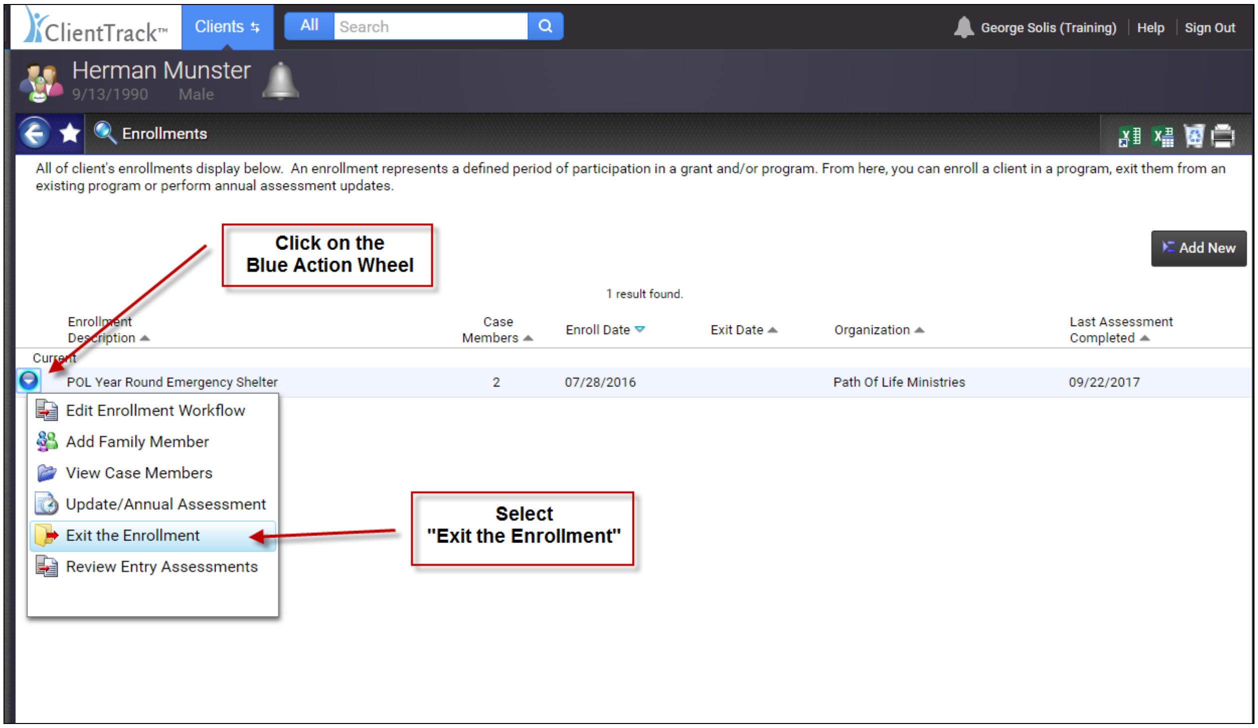
Note: When exiting a family, always start with the **Head of Household**.

➢ Select "Enrollments" from the Clients Menu to navigate to the Enrollments Screen



Enrollments Screen

- ➢ Click on the Blue Action Wheel
- ➢ Select “Exit the Enrollment”



Note: You can also exit the enrollment workflow by clicking on the Blue Action Wheel from the Client’s Dashboard

3.11 Project Exit Date

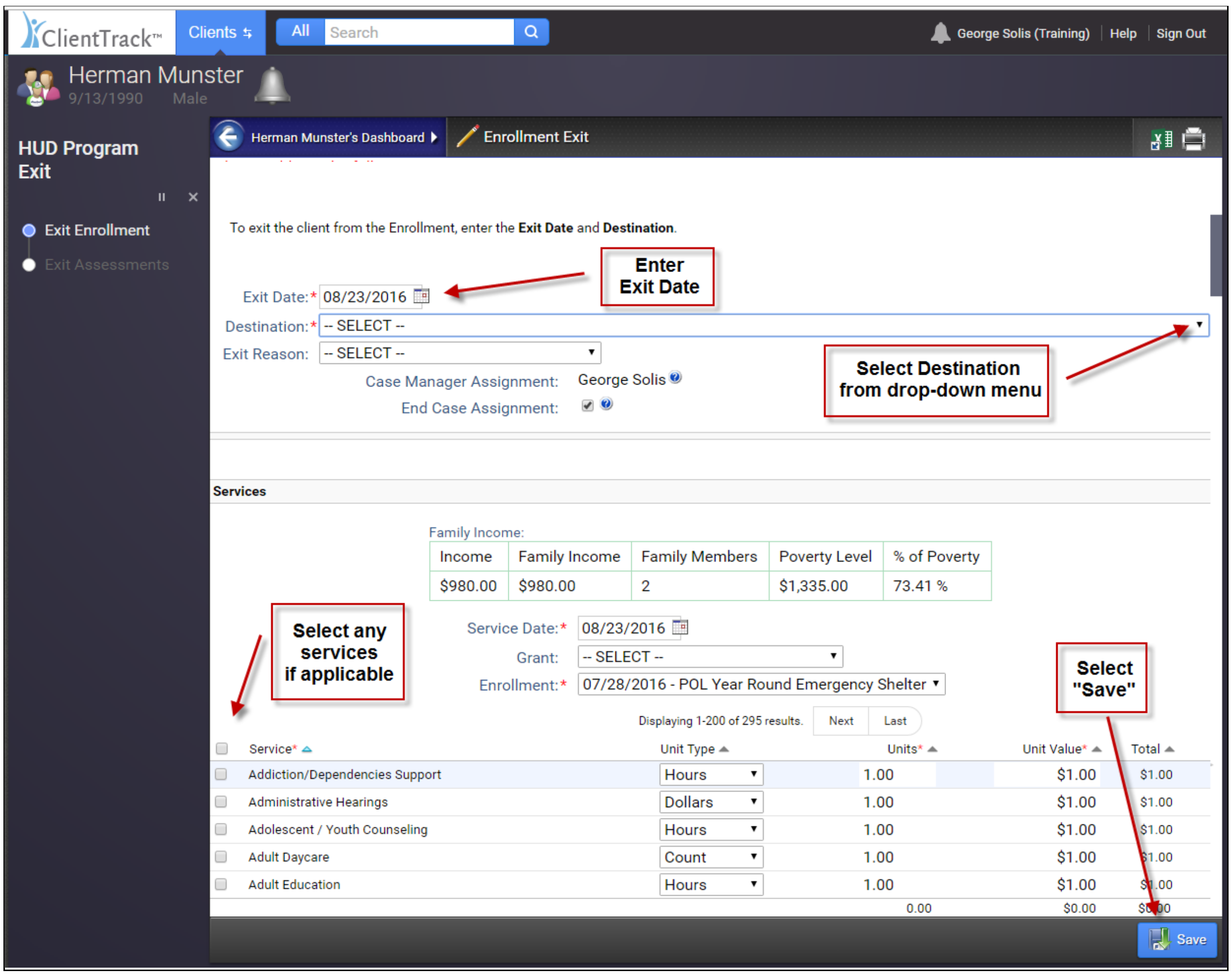
For residential projects, this date would represent the last day of continuous stay in the project before the client transfers to another residential project or otherwise stops residing in the project. For example, is a person checked into an overnight shelter on January 30, 2014, stayed overnight and left in the morning, the exit date for that shelter stay would be January 31, 2014.

- Enter Exit Date

3.12 Destination

This data element identifies where a client will stay just after exiting a project for purposes of tracking and outcome measurement.

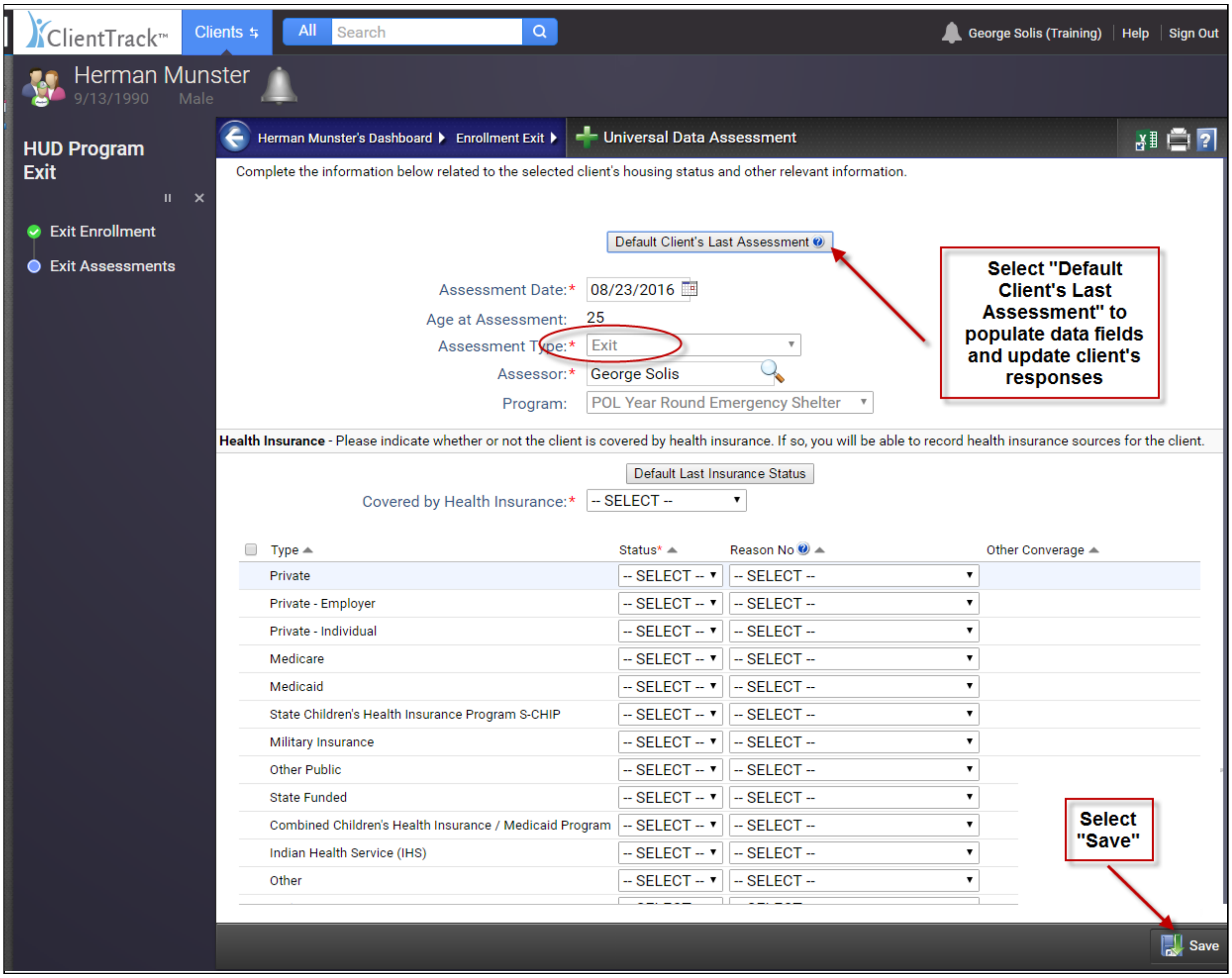
- Select the destination response from the drop-down menu
- Exit reason is not required
- Select any services if applicable
- Select "Save"



HUD understands that often shelters are not able to collect exit data. Persons who leave/ disappear without completing an exit interview are to be recorded with an exit destination as: "No exit interview completed".

Exit Assessment

- Select “Default Client’s Last Assessment” to populate data fields
- Update client’s responses for data collection
- Select “Save”

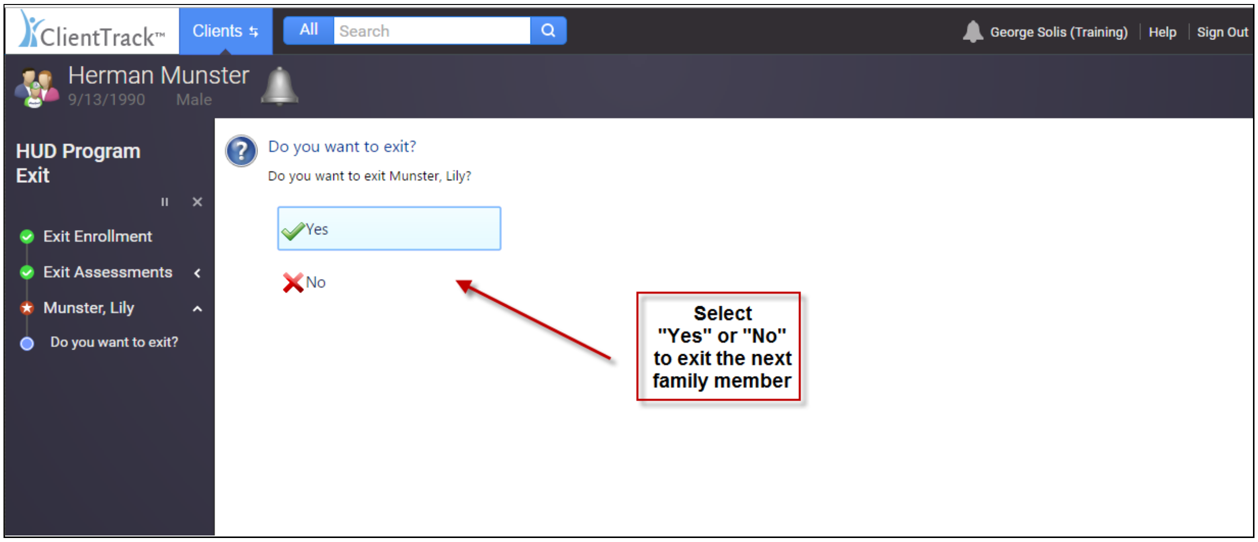


- Complete all steps in the Exit workflow
  - 4.4 Health Insurance
  - 4.10 Substance Abuse – Alcohol/ Drug
  - 4.7 Chronic Health Condition
  - 4.6 Developmental Disability
  - 4.8 HIV/AIDS
  - 4.9 Mental Health Problem
  - 4.5 Physical Disability
  - 4.2 Income and Sources
  - 4.3 Non-Cash Benefits

Exit for family members

Once you have completed the exit workflow for the Head of the Household, the exit workflow will start over for the next family member.

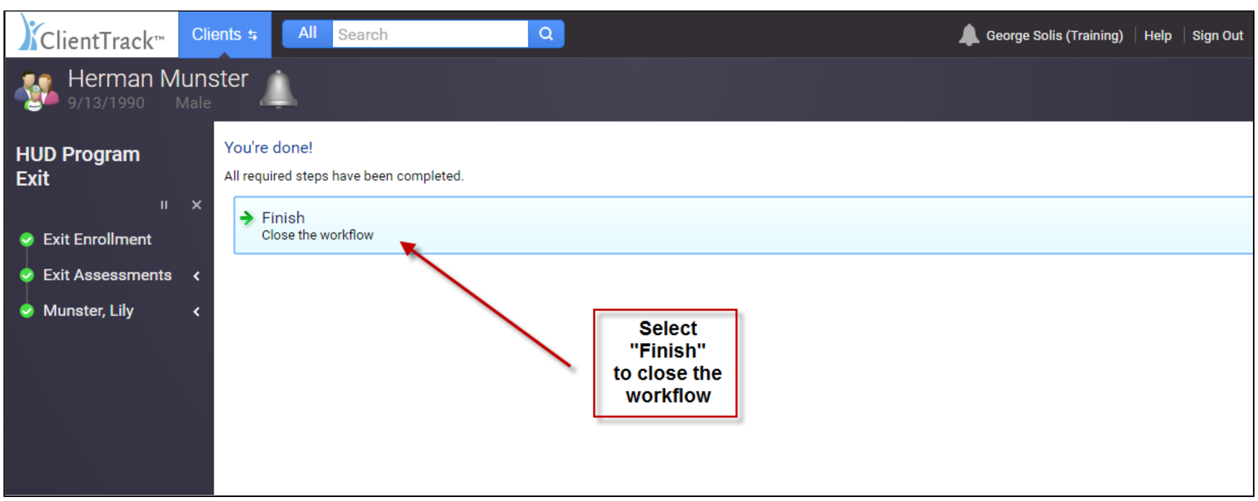
- Select "Yes" or "No" to exit the next family member
- Complete all steps in the exit workflow for all family members



Completion of exit

The exit is complete once all family members' workflows have been completed.

- Select "Finish" to close the workflow

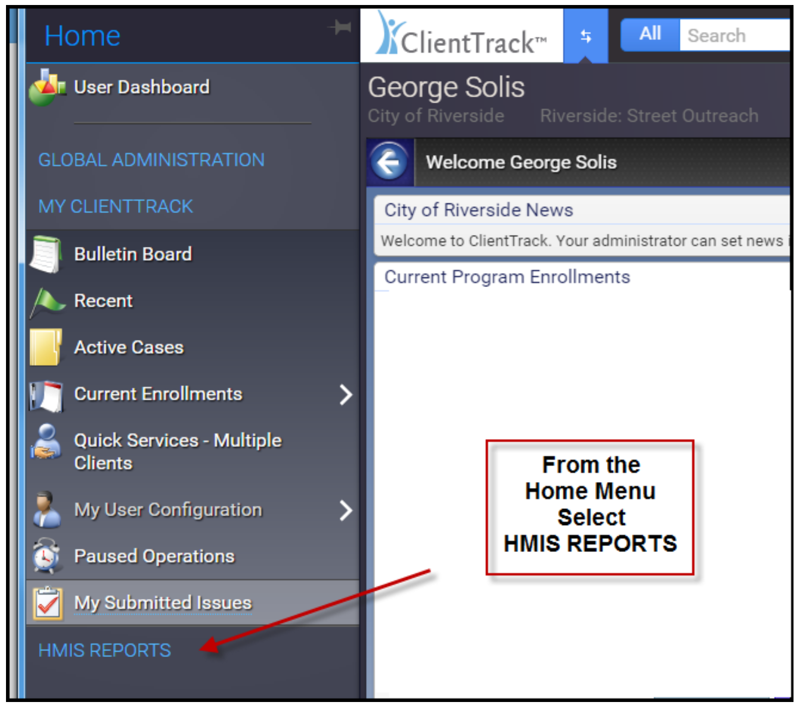


HMIS Reports

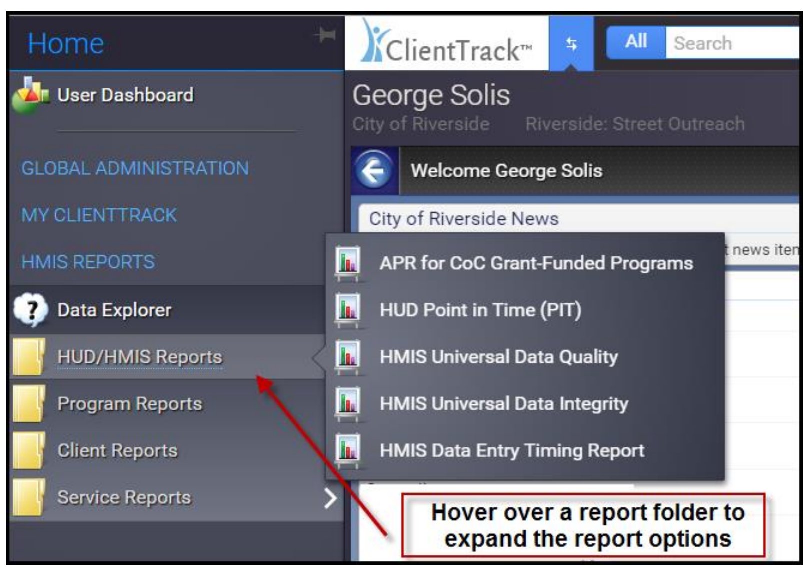
ClientTrack's reporting tools helps you monitor and synthesize the data you collect to stay on top of your operations, evaluate and report on outcomes, and increase funding. Organizations use these reports to measure the effectiveness of programs, submit data to the Continuum of Care and meet Federal reporting requirements.

Reports are accessed from the Home Workspace. Some of the most commonly used reports are illustrated on the following pages.

- Select HMIS REPORTS from the Home Menu



- Hover over a report folder to expand the report options

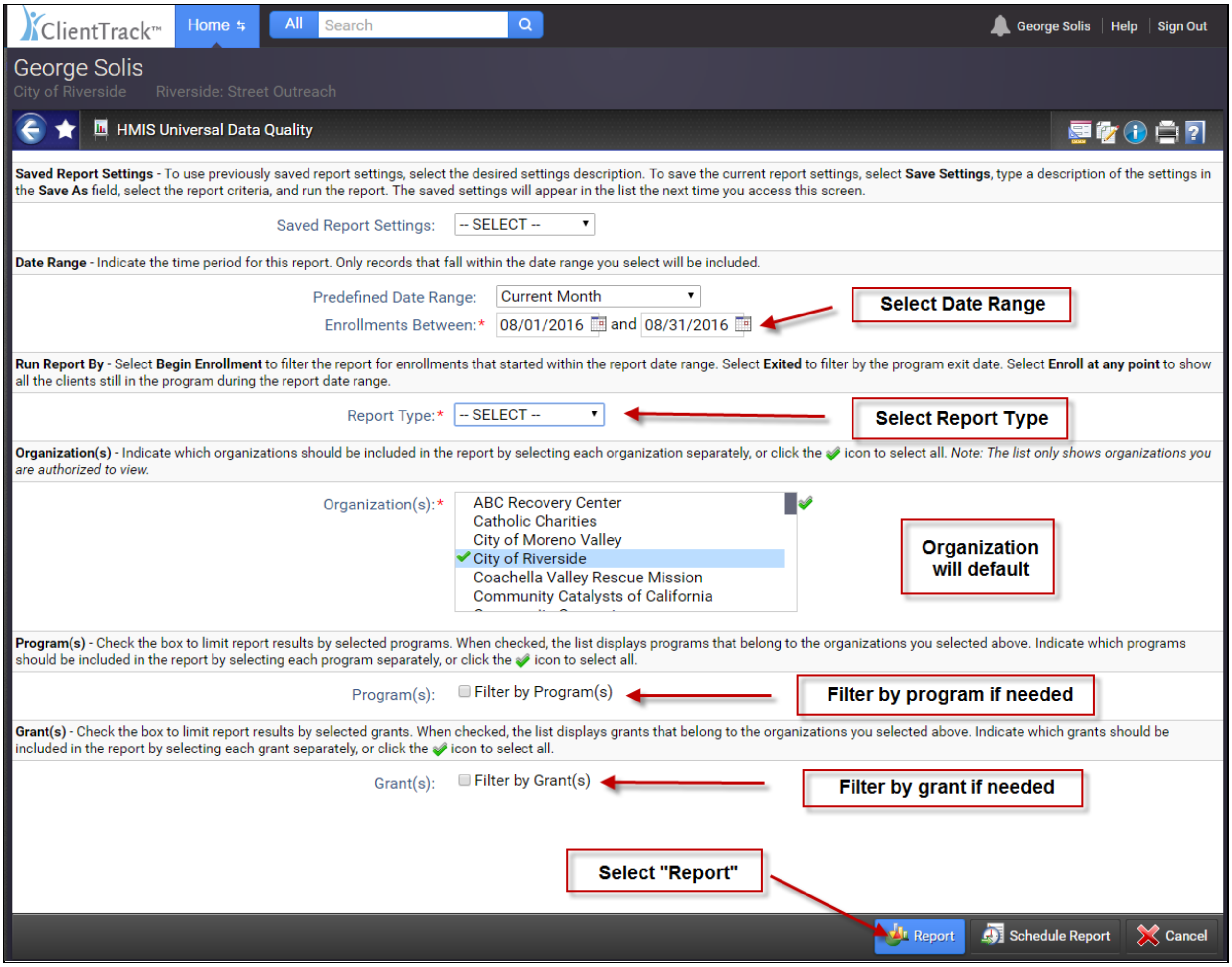


HMIS Universal Data Quality Report

The HMIS Universal Data Quality report is intended to assist end-users and system administrators identify and resolve data quality issues. The report compares enrollment data against HMIS Universal Data standards in order to quantify data quality. Users are able to choose whether to include all active enrollments during a date range or select only enrollments that began or exited during the report range.

The HMIS Universal Data Quality Report is accessed from the HUD/HMIS reports folder.

- **Report Date Range** – Indicate the time period for the report. Only client records that fall within the date range you selected will be included.
- **Run Report By** –
  - Select **Enroll at any point** to show any enrollment active within the report date range.
  - Select **Begin Enrollment** to show any enrollment where the enrollment entry date is within the report date range.
  - Select **Exited** to show any enrollment that was exited during the date range.
- **Organization** – Will default to your assigned organization.
- **Program** – Check the Filter by Program(s) box to limit report results by selected programs. When checked, the list displays programs that belong to your organization. Indicate which programs should be included in the report by selecting each program separately, or click the "**√**" icon to select all. If the report is not filtered by selected program(s), then program enrollment will not be required in order for a client to appear in the results.
- **Grant** – Check the Filter by Grant(s) box to limit report results by selected grants. When checked, the list displays grants that belong to your organization. Indicate which grants should be included in the report by selecting each grant separately, or click the "**√**" icon to select all. If the report is not filtered by selected grant(s), then a grant associated with an enrollment will not be required in order for a client to appear in the results.
- Select "**Report**" to generate the report.

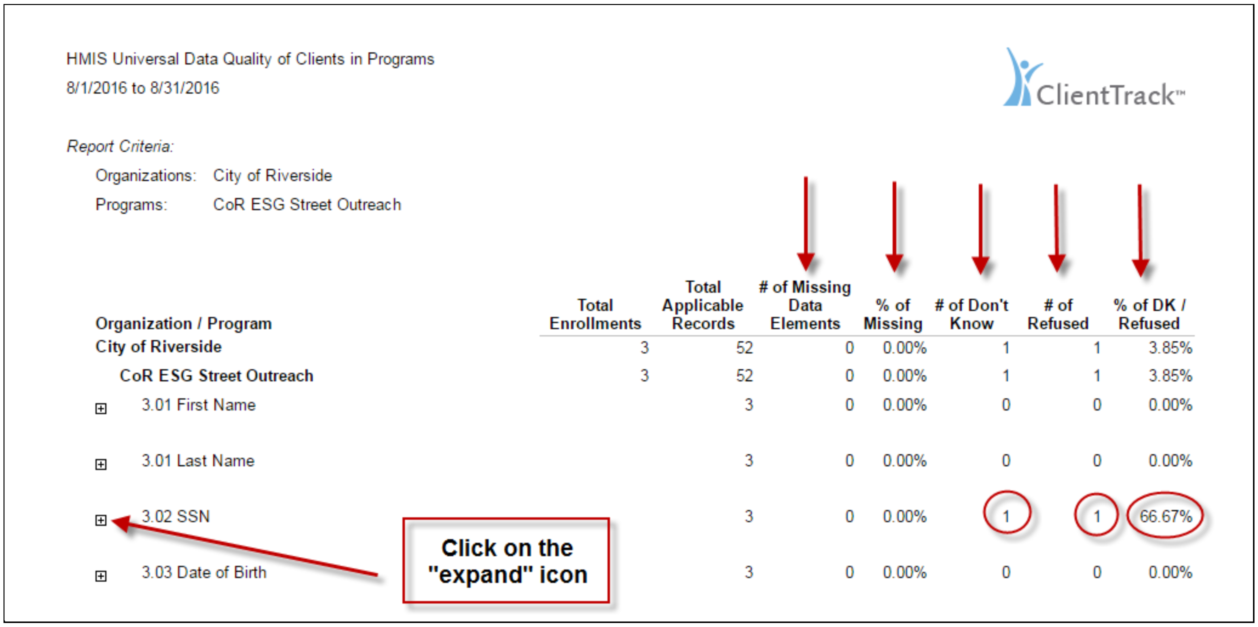


The report will display the following:

- Total Applicable Records
- # of Missing Data Elements
- % of Missing
- # of Don't Know
- # of Refused
- % of DK/ Refused

The report allows you to access more details about each data element through the expand icon "+" next to each criteria.

➢ Click on the expand icon "+" to access more details about each data element



HMIS Universal Data Quality of Clients in Programs
8/1/2016 to 8/31/2016

ClientTrack™

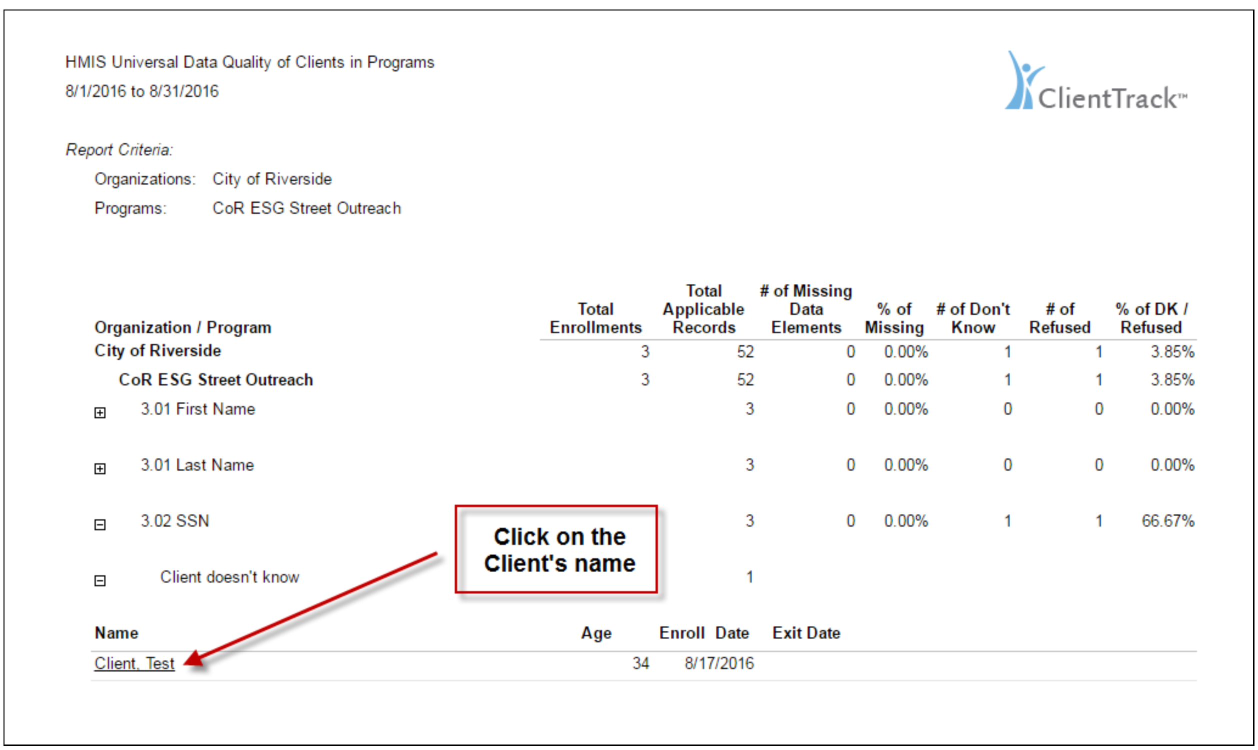
Report Criteria:
Organizations: City of Riverside
Programs: CoR ESG Street Outreach

Organization / Program	Total Enrollments	Total Applicable Records	# of Missing Data Elements	% of Missing	# of Don't Know	# of Refused	% of DK / Refused
City of Riverside	3	52	0	0.00%	1	1	3.85%
CoR ESG Street Outreach	3	52	0	0.00%	1	1	3.85%
⊞ 3.01 First Name		3	0	0.00%	0	0	0.00%
⊞ 3.01 Last Name		3	0	0.00%	0	0	0.00%
⊞ 3.02 SSN		3	0	0.00%	1	1	66.67%
⊞ 3.03 Date of Birth		3	0	0.00%	0	0	0.00%

Click on the "expand" icon

The client names are hyperlinks that can be used to select a client. This feature is useful when using the report to identify, analyze, and correct data quality issues.

- Click on the name and ClientTrack will navigate to the client workspace and select the client's record.



HMIS Universal Data Quality of Clients in Programs
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ClientTrack™

Report Criteria:
Organizations: City of Riverside
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Organization / Program	Total Enrollments	Total Applicable Records	# of Missing Data Elements	% of Missing	# of Don't Know	# of Refused	% of DK / Refused
City of Riverside	3	52	0	0.00%	1	1	3.85%
CoR ESG Street Outreach	3	52	0	0.00%	1	1	3.85%
⊞ 3.01 First Name		3	0	0.00%	0	0	0.00%
⊞ 3.01 Last Name		3	0	0.00%	0	0	0.00%
⊟ 3.02 SSN		3	0	0.00%	1	1	66.67%
⊟ Client doesn't know		1					

Name	Age	Enroll Date	Exit Date
Client, Test	34	8/17/2016	

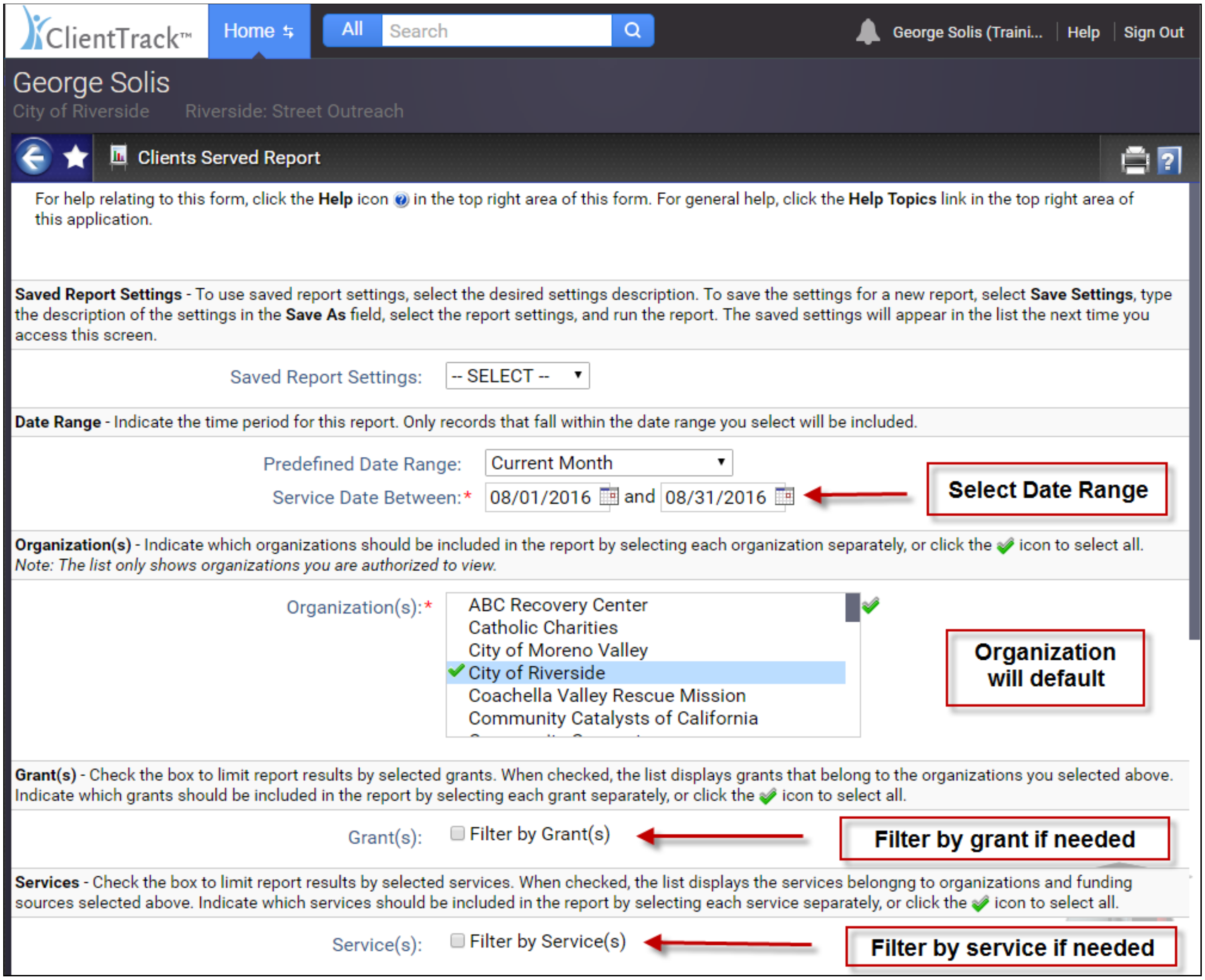
Click on the Client's name

Clients Served Report

The Clients Served report is designed to show data about a client served within a date range. The report aggregates data at a client level making it useful for reporting needs like service utilization by client. The report also includes basic demographic and identifying information for clients. The report can be expanded to display service details for each service in the date range including Service Type (i.e. service code), service date, grant, units, unit value, and service total.

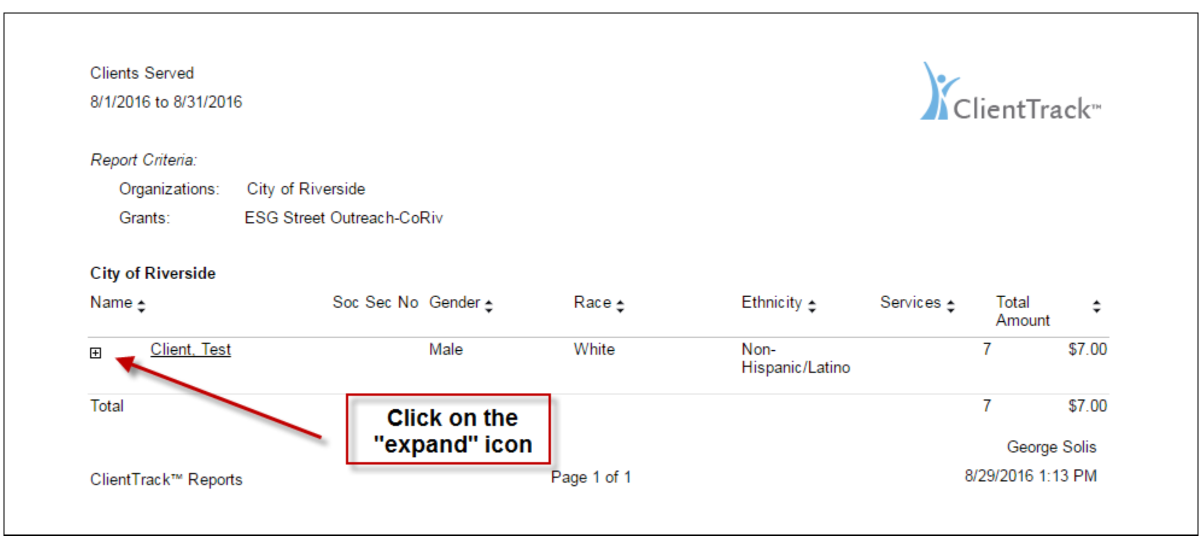
The Clients Served Report is accessed from the Service Reports folder.

- **Report Date Range** – Indicate the time period for the report. Only client records that fall within the date range you selected will be included.
- **Organization** – Will default to your assigned organization.
- **Grant** – Check the Filter by Grant(s) box to limit report results by selected grants. When checked, the list displays grants that belong to your organization. Indicate which grants should be included in the report by selecting each grant separately, or click the "**√**" icon to select all.
- **Services** – Check the Filter by Services(s) box to limit report results by selected services. When checked, the list displays services belonging to your organization and funding sources selected above. Indicate which services should be included in the report by selecting each service separately, or click the "**√**" icon to select all.
- **Users** - Check the Filter by Users(s) box to limit report results by the User who provided the service. When checked, the list displays users that belong to your organization. Indicate which users should be included in the report by selecting each user separately, or click the "**√**" icon to select all.
- **Case Managers** - Check the Filter by Case Manager(s) box to limit report results by the client's Case Manager(s). When checked, the list displays Case Manager(s) that belong to your organization. Indicate which Case Manager(s) should be included in the report by selecting each Case Manager separately, or click the "**√**" icon to select all.
- **Housing Status** - - Check the Filter by Housing Status box to limit report results by selected housing status. When checked, the list displays possible housing status options. Indicate which housing status should be included in the report by selecting each housing status separately, or click the "**√**" icon to select all.
- **Client Age Range** – Check the box to limit report results by a selected age range.
- **State, County and Zip Code** – Check the boxes to limit report results by selected geographical location, only Filter by Zip Code would apply.
- **Additional filters** – Check the boxes to filter by direct services, veterans or HIV and AIDS Cases.
- Select "**Report**" to generate the report.


ClientTrack™
Home
All
Search
George Solis (Traini...
Help
Sign Out
George Solis
City of Riverside
Riverside: Street Outreach
Clients Served Report
For help relating to this form, click the **Help** icon in the top right area of this form. For general help, click the **Help Topics** link in the top right area of this application.
Saved Report Settings - To use saved report settings, select the desired settings description. To save the settings for a new report, select **Save Settings**, type the description of the settings in the **Save As** field, select the report settings, and run the report. The saved settings will appear in the list the next time you access this screen.
Saved Report Settings: -- SELECT --
Date Range - Indicate the time period for this report. Only records that fall within the date range you select will be included.
Predefined Date Range: Current Month
Service Date Between:* 08/01/2016 and 08/31/2016
Select Date Range
Organization(s) - Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all.
Note: The list only shows organizations you are authorized to view.
Organization(s):*
ABC Recovery Center
Catholic Charities
City of Moreno Valley
City of Riverside
Coachella Valley Rescue Mission
Community Catalysts of California
Organization will default
Grant(s) - Check the box to limit report results by selected grants. When checked, the list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting each grant separately, or click the icon to select all.
Grant(s): Filter by Grant(s)
Filter by grant if needed
Services - Check the box to limit report results by selected services. When checked, the list displays the services belongng to organizations and funding sources selected above. Indicate which services should be included in the report by selecting each service separately, or click the icon to select all.
Service(s): Filter by Service(s)
Filter by service if needed

The report allows you to view service details by client through the expand icon "+" next to each client's name.

- Click on the expand icon "+" to access more service details by client



This screenshot shows both the aggregate view that displays the number of total services and the total amount and the service detail level.

Clients Served

8/1/2016 to 8/31/2016

ClientTrack™

Report Criteria:

Organizations: City of Riverside

Grants: ESG Street Outreach-CoRiv

City of Riverside

Name	Soc Sec No	Gender	Race	Ethnicity	Services	Total Amount
⊟ Client, Test		Male	White	Non-Hispanic/Latino	7	$7.00

Unknown
Unknown, Unknown

Service	Service Date	Grant	Units	Unit Value	Total
Outreach Contact	8/17/2016	ESG Street Outreach-CoRiv	1.00	1.00	$1.00
Outreach Contact	8/22/2016	ESG Street Outreach-CoRiv	1.00	1.00	$1.00
Phone Call on Behalf of Client	8/22/2016	ESG Street Outreach-CoRiv	1.00	1.00	$1.00
Water	8/22/2016	ESG Street Outreach-CoRiv	1.00	1.00	$1.00
Outreach Contact	8/29/2016	ESG Street Outreach-CoRiv	1.00	1.00	$1.00
Towel/Toiletries	8/29/2016	ESG Street Outreach-CoRiv	1.00	1.00	$1.00
Water	8/29/2016	ESG Street Outreach-CoRiv	1.00	1.00	$1.00
Total				7	$7.00

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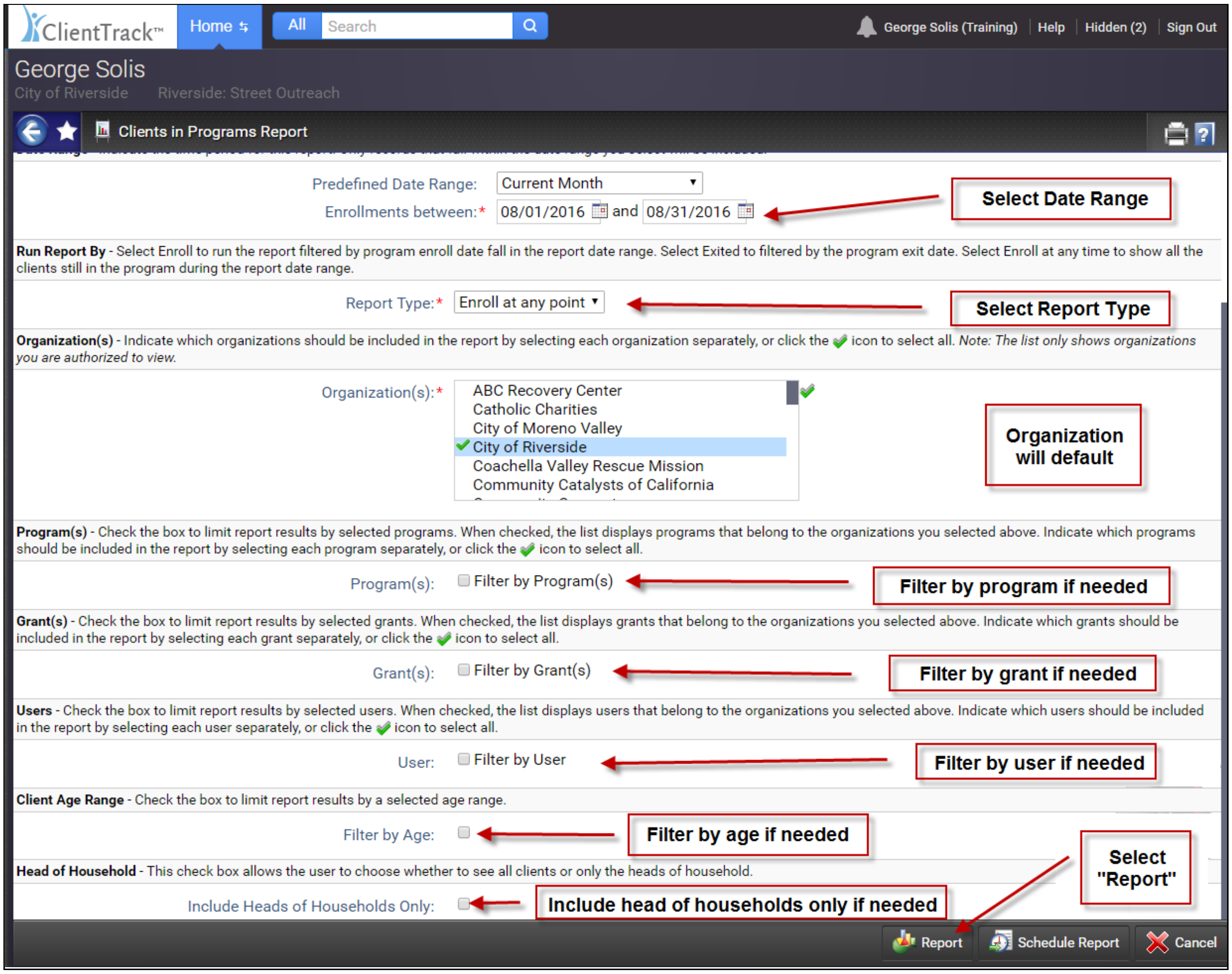
ClientTrack™ Reports Page 1 of 1 8/29/2016 1:13 PM

Clients in Programs Report

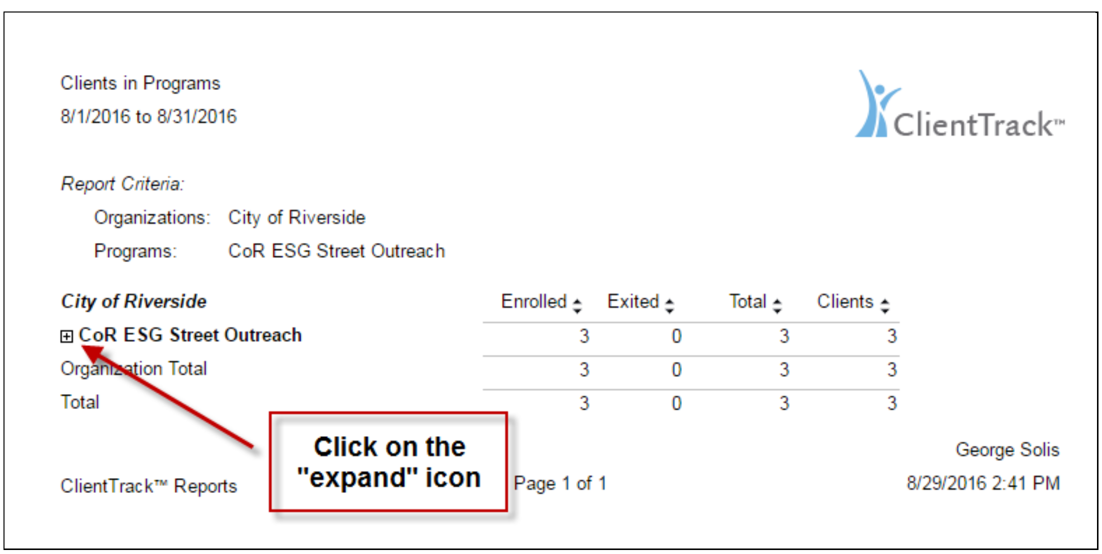
The Clients in Programs report shows the count of clients enrolled by program and allows you to dynamically expand each program to show the client name, SSN, race, gender, enrollment date, exit date and separate totals for those clients still enrolled and those who have an end date. It also displays the total number of days the client spent enrolled in the program if an end date has been entered or the number of days from the enrollment date to the end date of the reporting period if the enrollment is still active.

The Clients in Program Report is accessed from the Program Reports folder.

- **Report Date Range** – Indicate the time period for the report. Only client records that fall within the date range you selected will be included.
- **Run Report By** –
  - Select **Enroll at any point** to show any enrollment active within the report date range.
  - Select **Begin Enrollment** to show any enrollment where the enrollment entry date is within the report date range.
  - Select **Exited** to show any enrollment that was exited during the date range.
- **Organization** – Will default to your assigned organization.
- **Program** – Check the Filter by Program(s) box to limit report results by selected programs. When checked, the list displays programs that belong to your organization. Indicate which programs should be included in the report by selecting each program separately, or click the "**√**" icon to select all. If the report is not filtered by selected program(s), then program enrollment will not be required in order for a client to appear in the results.
- **Grant** – Check the Filter by Grant(s) box to limit report results by selected grants. When checked, the list displays grants that belong to your organization. Indicate which grants should be included in the report by selecting each grant separately, or click the "**√**" icon to select all. If the report is not filtered by selected grant(s), then a grant associated with an enrollment will not be required in order for a client to appear in the results.
- **Users** - Check the Filter by Users(s) box to limit report results by the User who provided the service. When checked, the list displays users that belong to your organization. Indicate which users should be included in the report by selecting each user separately, or click the "**√**" icon to select all.
- **Client Age Range** – Check the box to limit report results by a selected age range.
- **Head of Household** – Check the box to only include the heads of households.
- Select "**Report**" to generate the report.



➢ Click on the expand icon "+" to access more program details by client



Expanded view

Clients in Programs
8/1/2016 to 8/31/2016

ClientTrack™

Report Criteria:

Organizations: City of Riverside
Programs: CoR ESG Street Outreach

City of Riverside	Enrolled	Exited	Total	Clients
⊟ CoR ESG Street Outreach	3	0	3	3

Name	SSN Last 4	Race	Gender	Age	Enroll Date	Exit Date	Days	EnrollmentLength
Client, Test		White	Male	34	8/17/2016		15	15
Munster, Herman	XXX-XX-1111	White	Male	25	8/25/2016		7	7
Munster, Lily	XXX-XX-1122	White	Female	25	8/25/2016		7	7
Program Total	3 still enrolled		0 exited		3 total		3 clients	

	Enrolled	Exited	Total	Clients
Organization Total	3	0	3	3
Total	3	0	3	3

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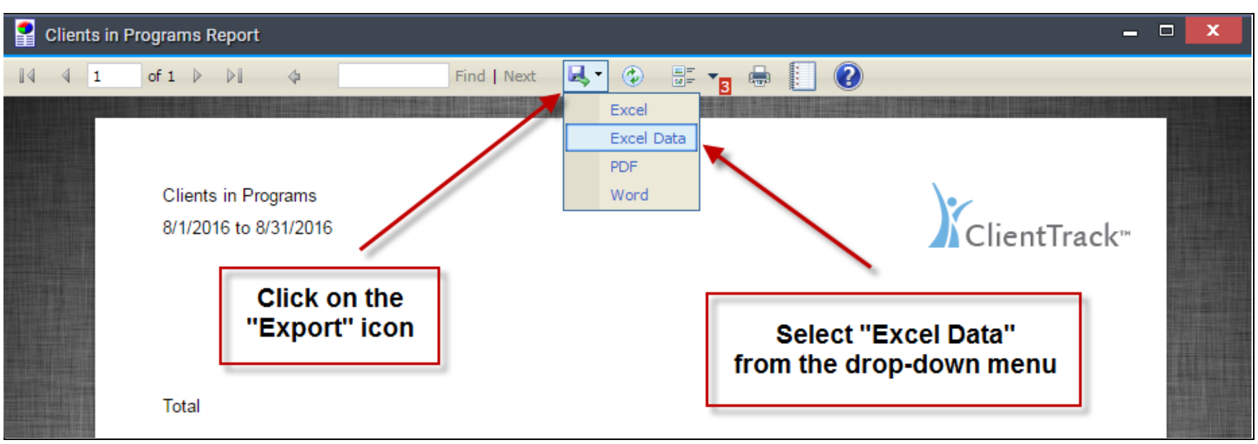
ClientTrack™ Reports   Page 1 of 1   8/29/2016 2:41 PM

Export as Excel Data

Any ClientTrack report can be exported as Excel Data for further data analysis.

- Click on the "Export" icon
- Select "Excel Data" from the drop-down menu
- File will download to Excel

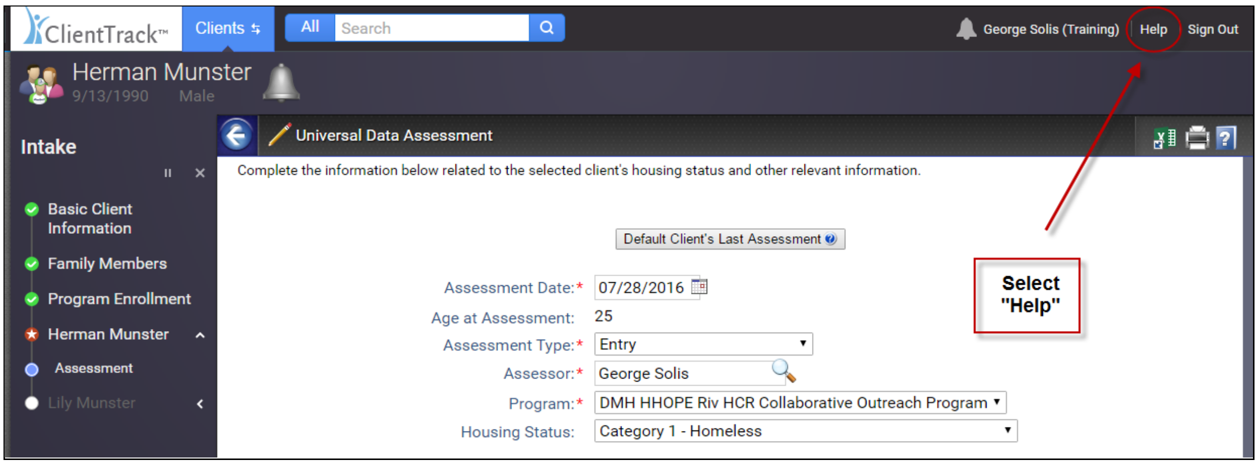


Support Tickets

ClientTrack includes a comprehensive ticket submission and management system. This system enables users to ask questions, make suggestions, or report issues from within the ClientTrack application.

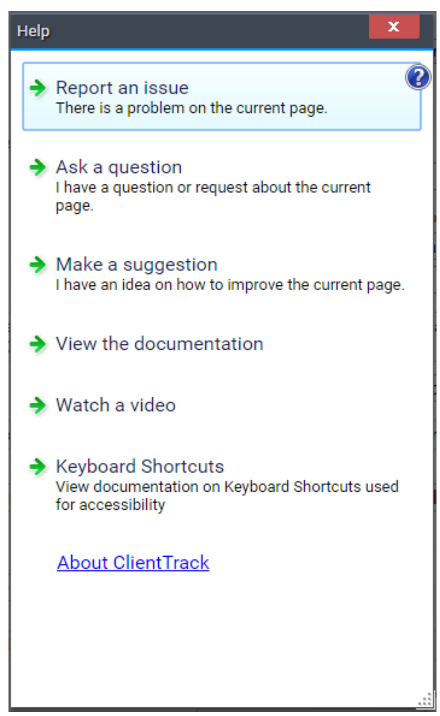
Submitting a Ticket

To get help in ClientTrack, simply navigate to the relevant area of the application in which you are experiencing an issue, and select **HELP** in the top right hand corner of your screen.

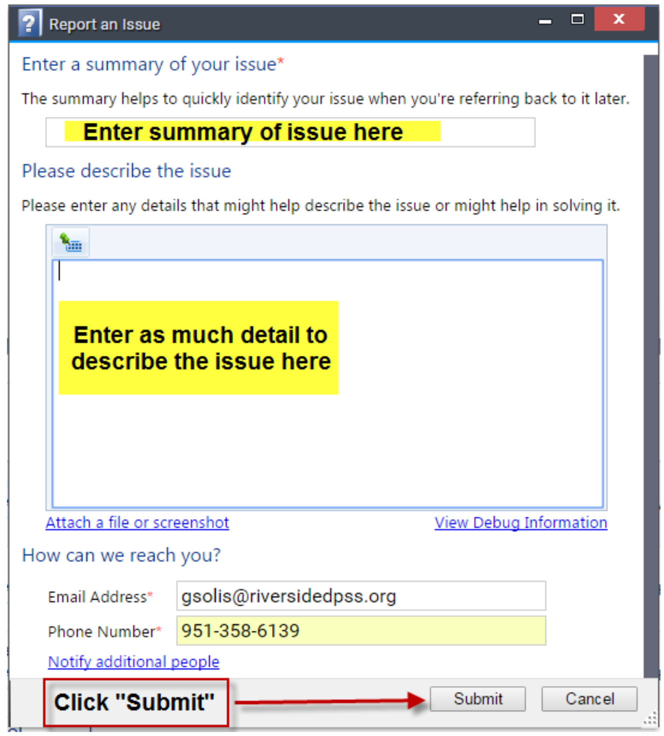


You will be presented with a dialog box designed to guide your request for help.

- Select **Report and Issue**, **Ask a question**, or **Make a suggestion**



You can then complete basic information about your request including a description, a screenshot, and information about how to best contact you for further clarification.



Support Workspace

Once the HMIS support staff has analyzed, fixed and verified the solution for a submitted ticket, it will be put into a status of "Fix/Needs Verification." Please take the time to review the notes regarding the solution, verify any issues are no longer happening in the system, and mark the ticket status as "Closed."

- Click on the "Edit" icon to edit/ view the issue