ClientTrack™

User Guide

HMIS Street Outreach Projects

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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.

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

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.

Street Outreach 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
- 4.12 Contact
- 4.13 Date of Engagement

Data Collection Challenges
A street outreach project is likely to encounter difficulty engaging homeless persons. Street outreach projects may record a project entry with limited information about the client and improve on the accuracy and completeness of client data over time by editing data in an HMIS as they engage the client. The initial entry may be as basic as the project entry date, a "made-up" name (e.g., "Redhat Tenthstreetbridge") that would be identifiable for retrieval by the worker in the system, and gender. Over time, the data must be edited for accuracy (e.g., replacing "Redhat" with "Robert") as the worker learns that detail.

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) to record the information into the HMIS software.

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

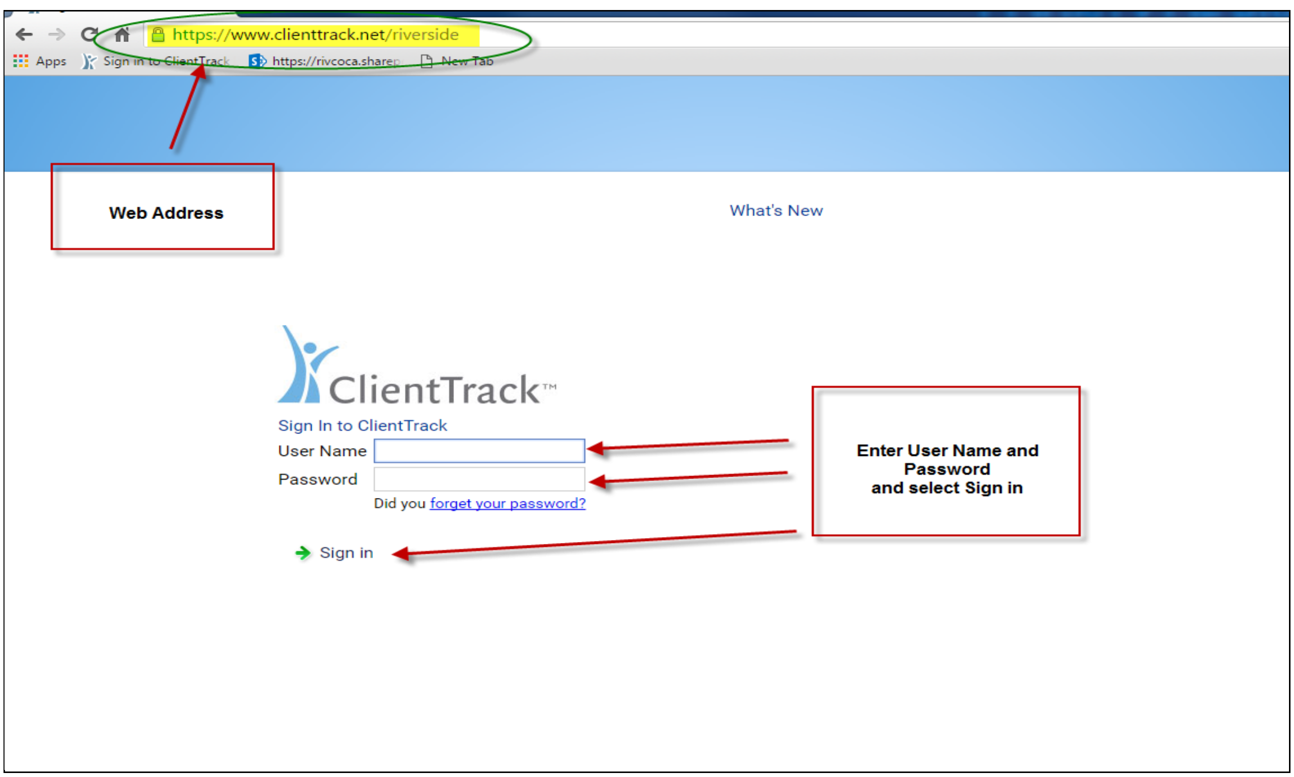
  (*First time user must change temporary password*)*

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**

- Select "Sign In"

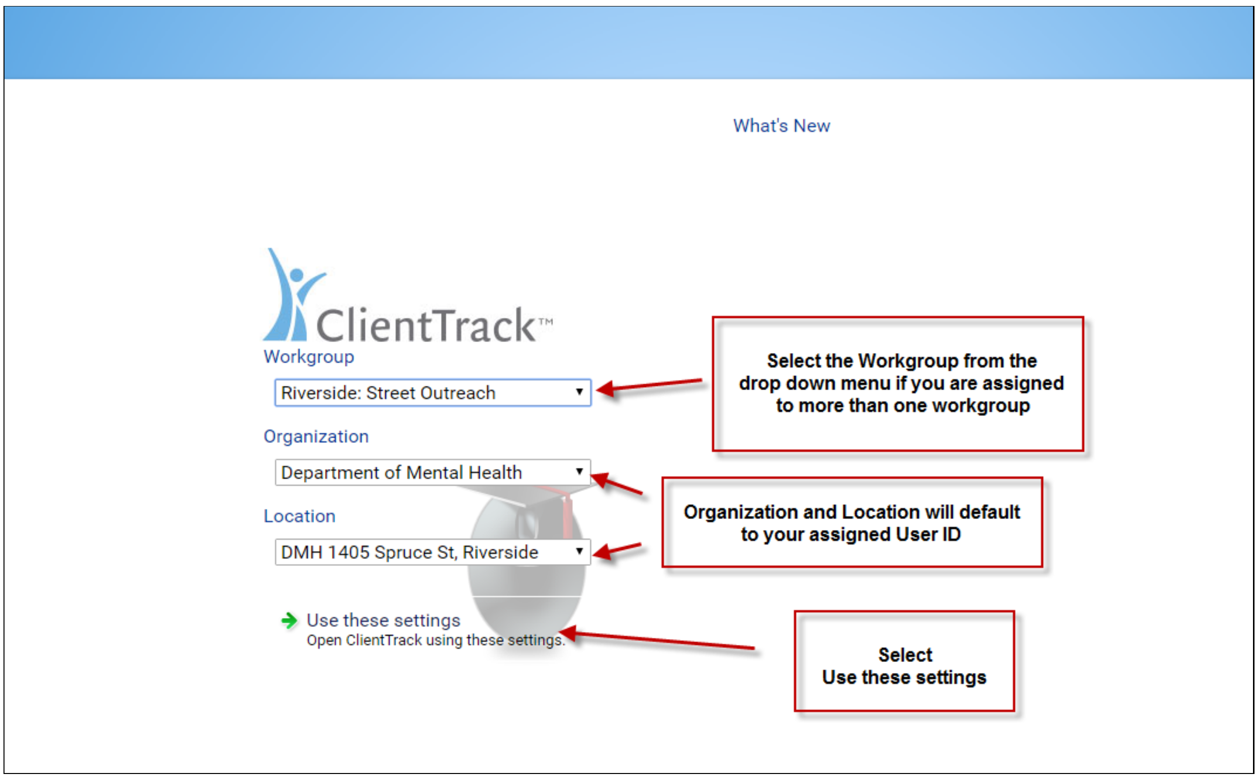


Workgroup

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

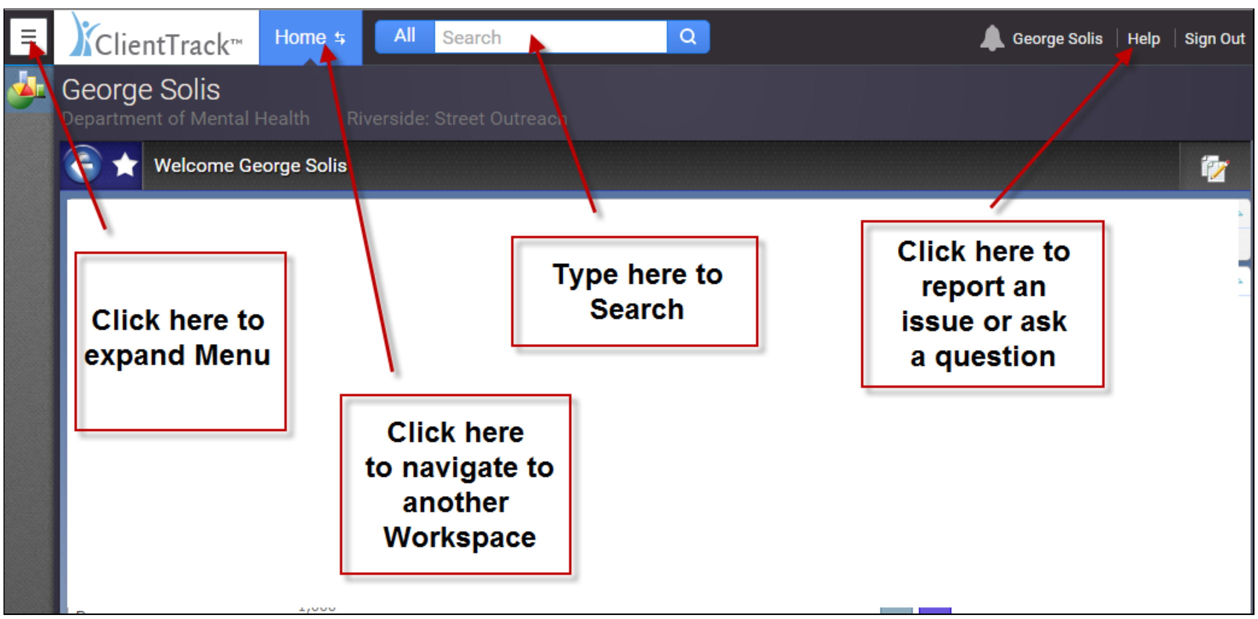
There are three Workspaces in ClientTrack.

- **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.

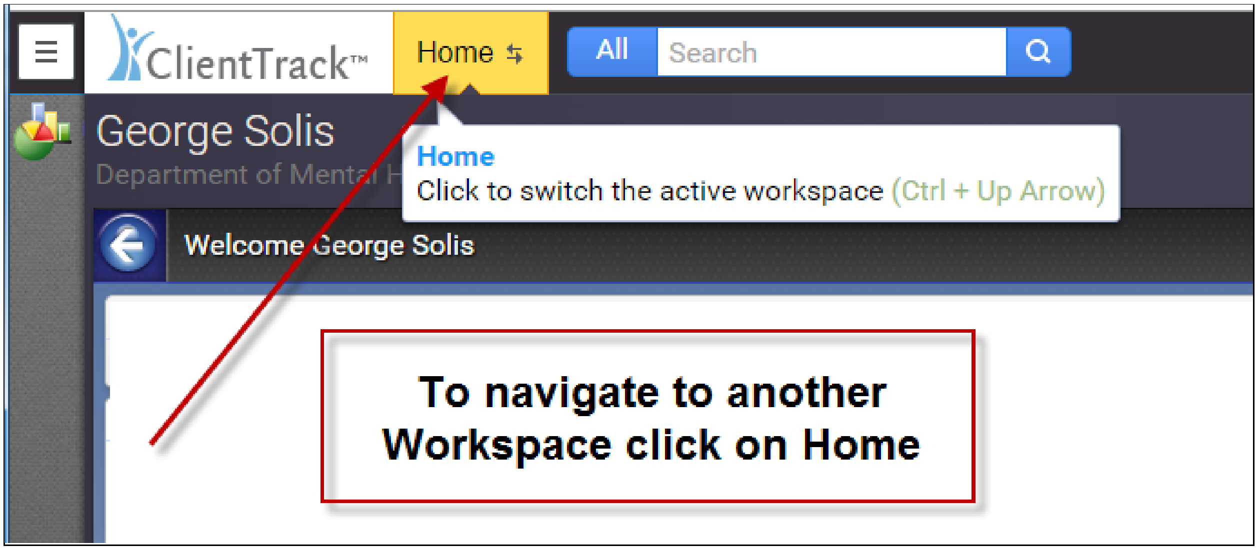
- ➢ Click on the left hand Menu Icon to expand the menu options
- ➢ Click on the Workspace navigation tab next to the ClientTrack logo to switch between workspaces
- ➢ Utilize the search function at the top of the page
- ➢ Use "Help" to report an issue or ask a question



Navigating between Workspaces

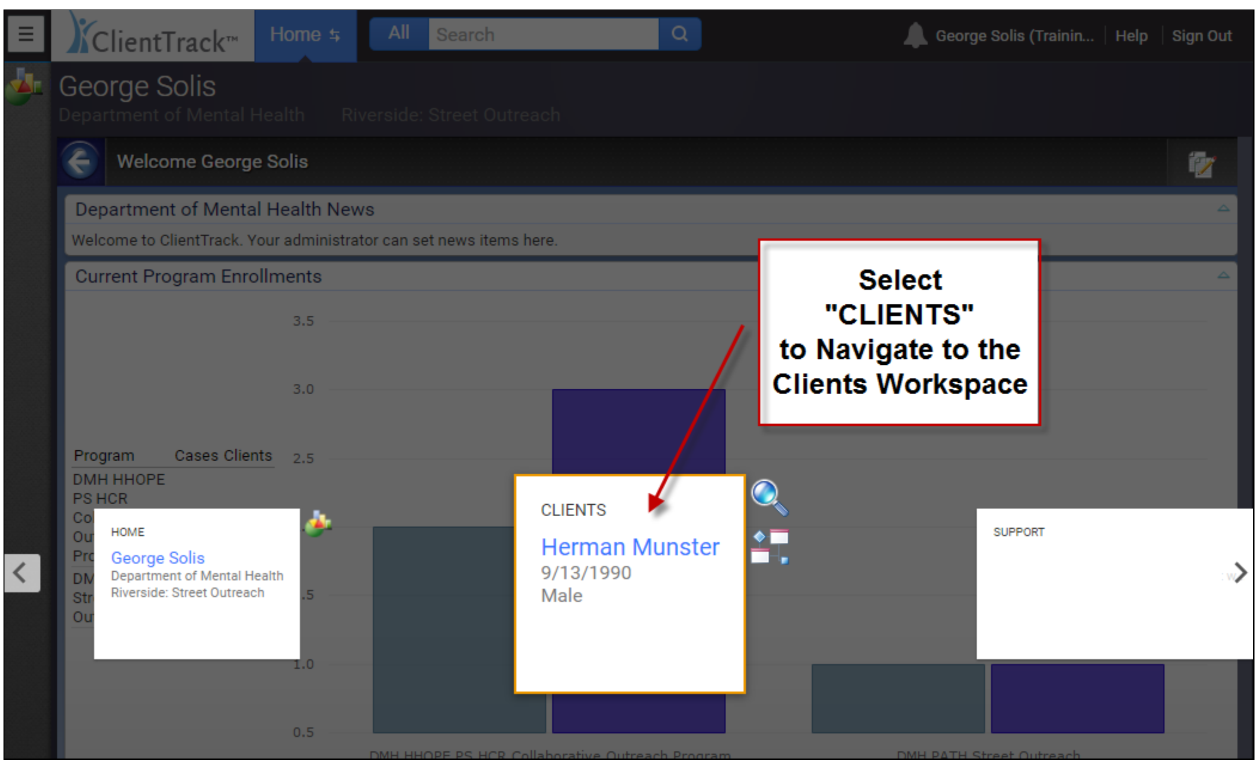
To navigate from the Home Workplace to the Clients Workspace

➢ 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.



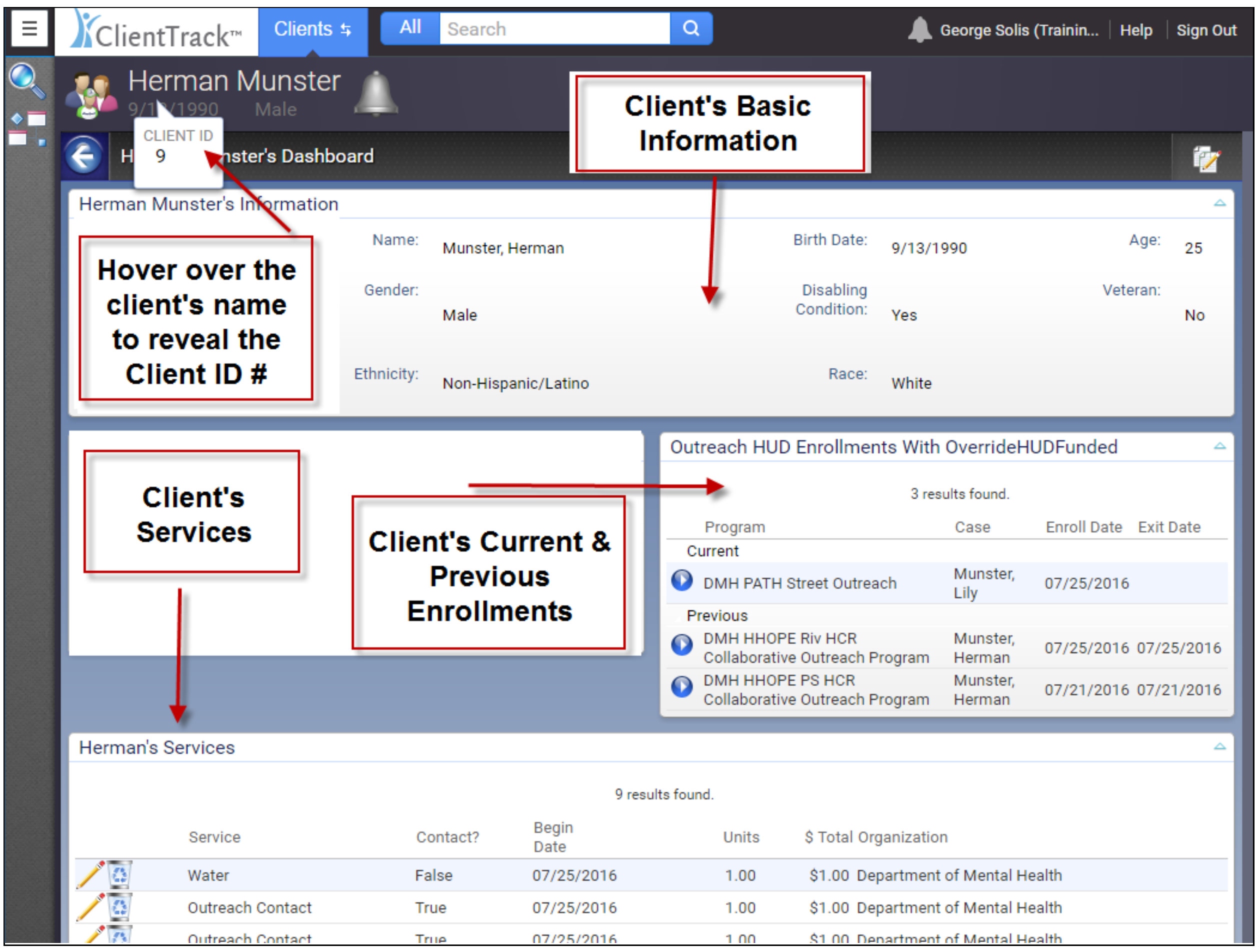
Clients Workspace

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

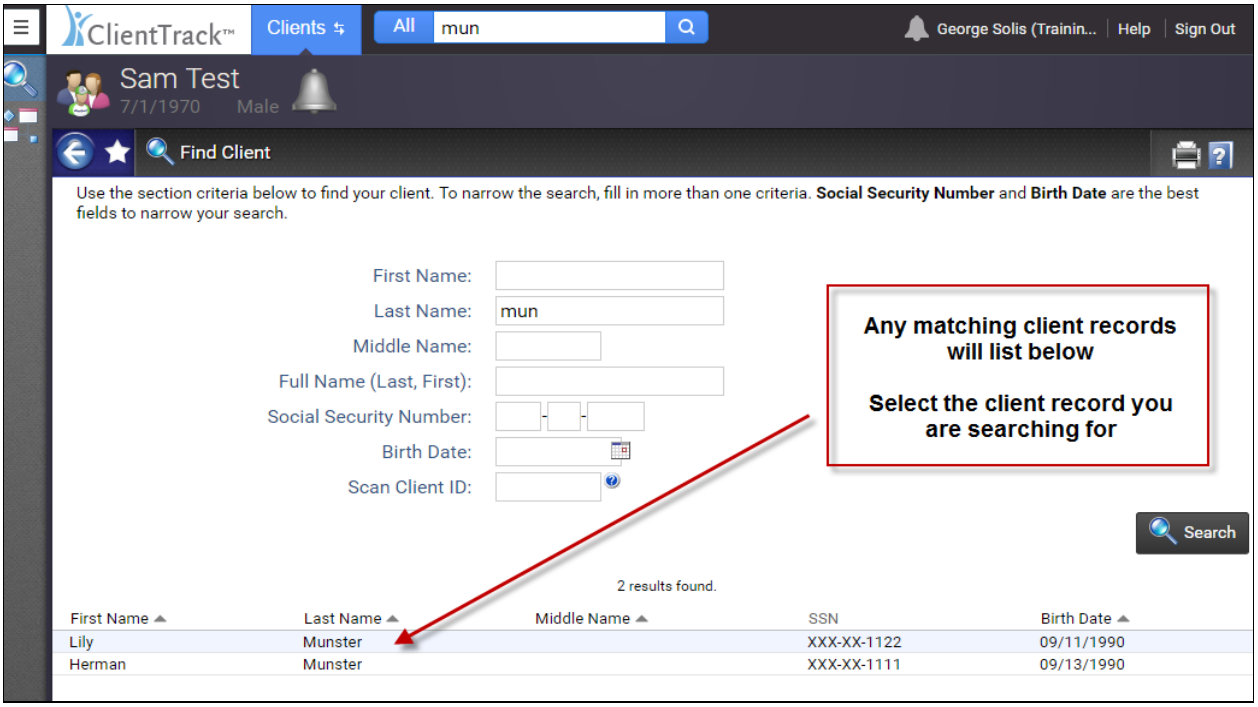
The first step in adding a new client is to search existing client records for possible matches to avoid duplicate entries. Since there are multiple users across HMIS, users **MUST** search client records by entering **partial identifying information** on the client:

- 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"

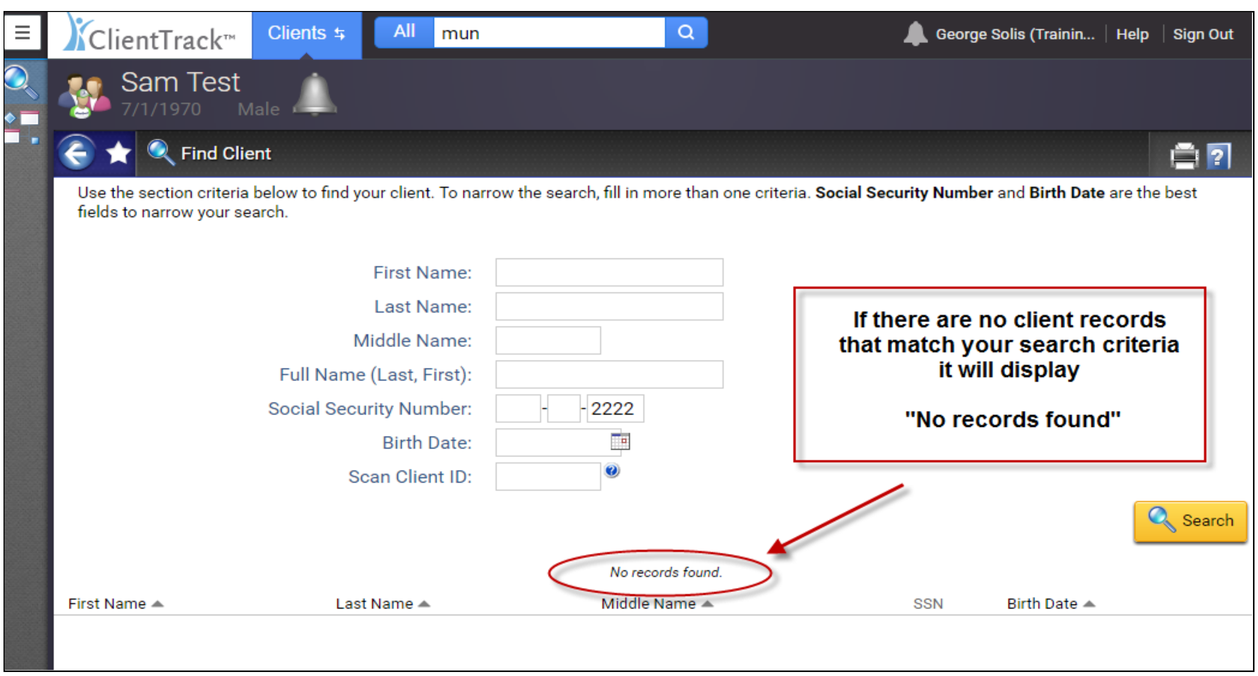
Existing Client Record

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



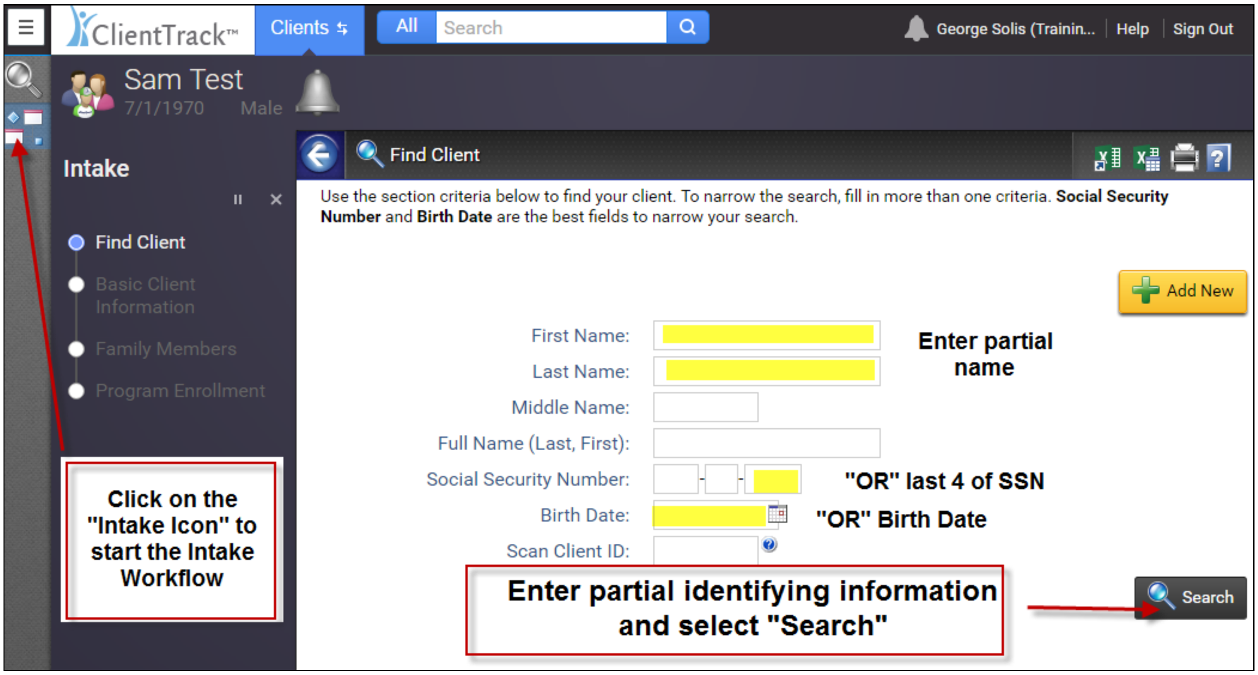
No records found

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

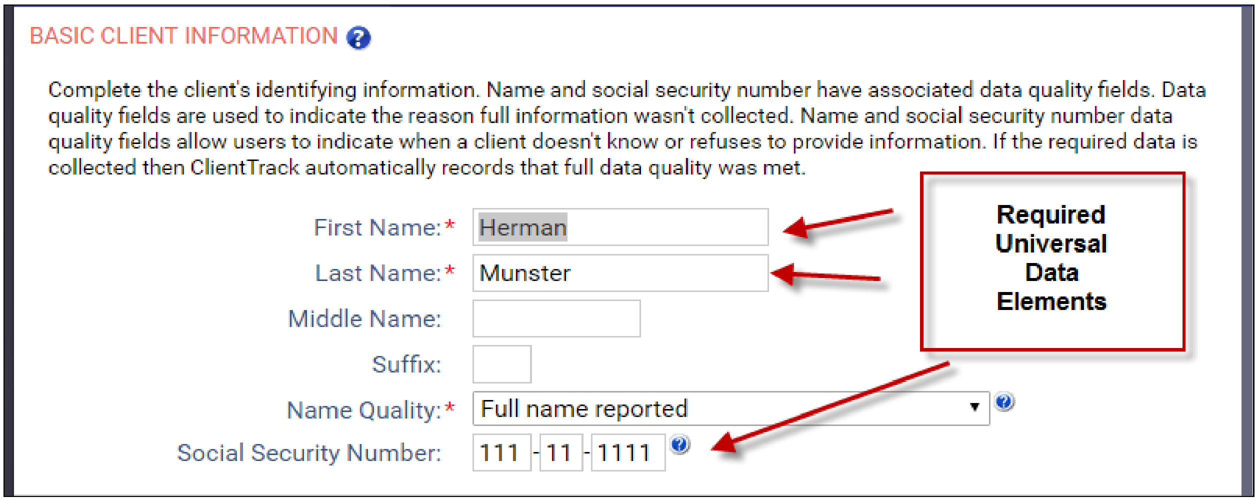


Head of Household
Identification of the heads of household for each household recorded in HMIS facilitates the identification, tracking and enumeration of households served by projects. In addition, specifying the relationship of household members to the head of household facilitates reporting on household 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.

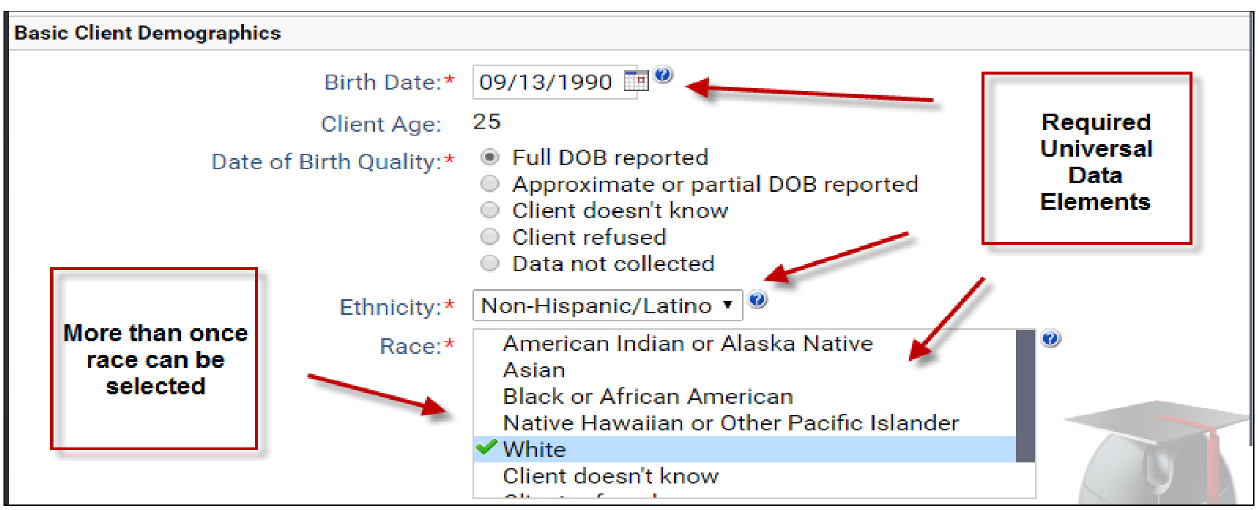
Intake with new client

Basic Client Information

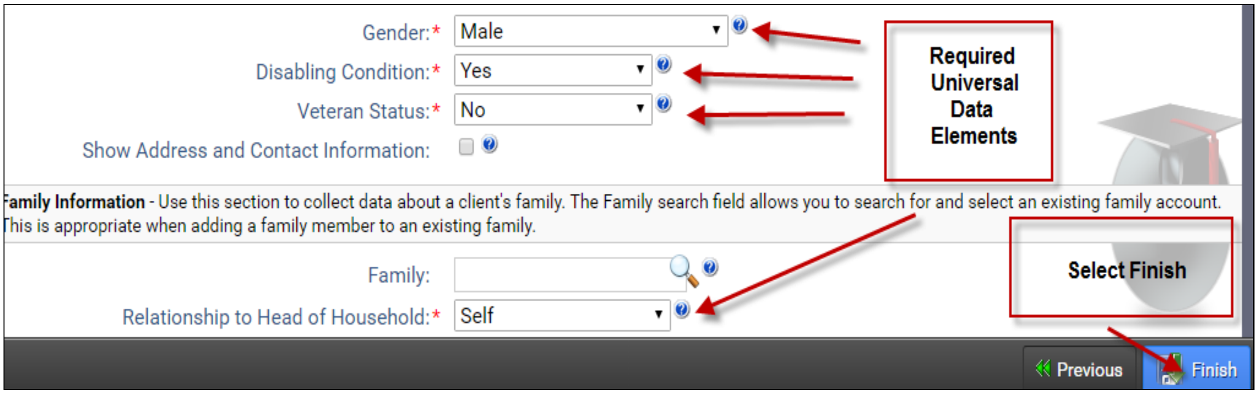
- Any field with a * is a required Universal Data Element
- 3.1 Name - Enter First & Last Name
- 3.2 Social Security Number - Enter Social Security Number



- 3.3 Date of Birth - Enter Birth Date
- 3.4 Ethnicity - Select Ethnicity from drop-down menu
- 3.4 Race - Select Race from drop-down menu *(more than one race can be selected)*



- 3.6 Gender - Select Gender from drop-down menu
- 3.8 Disabling Condition - Select Disabling Condition from drop-down menu
- 3.7 Veteran Status - Select Veteran Status from drop-down menu
- 3.15 Relationship to Head of Household - Select Relationship to Head of Household from drop-down menu
- 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.

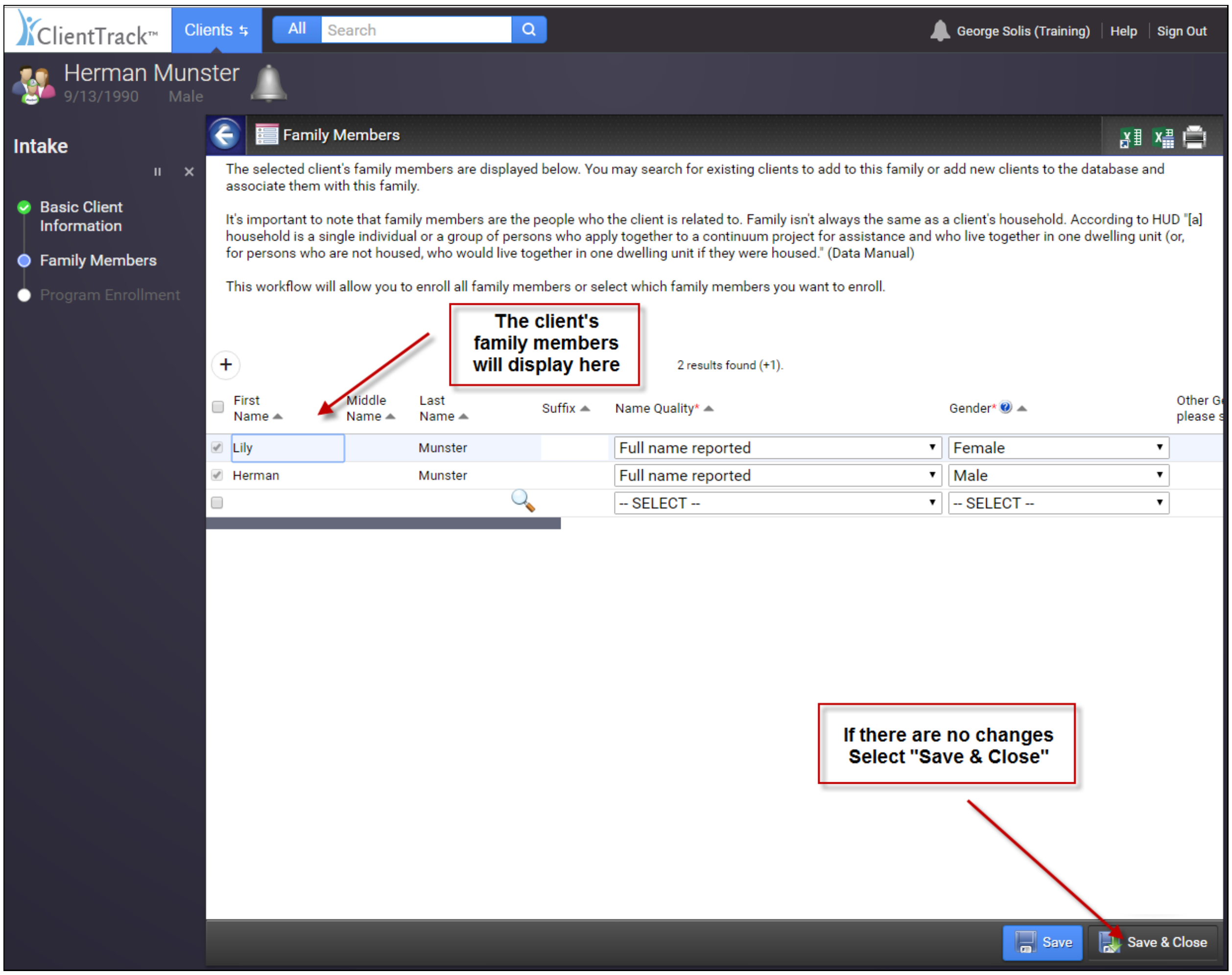
Intake with an existing client record

- 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*)

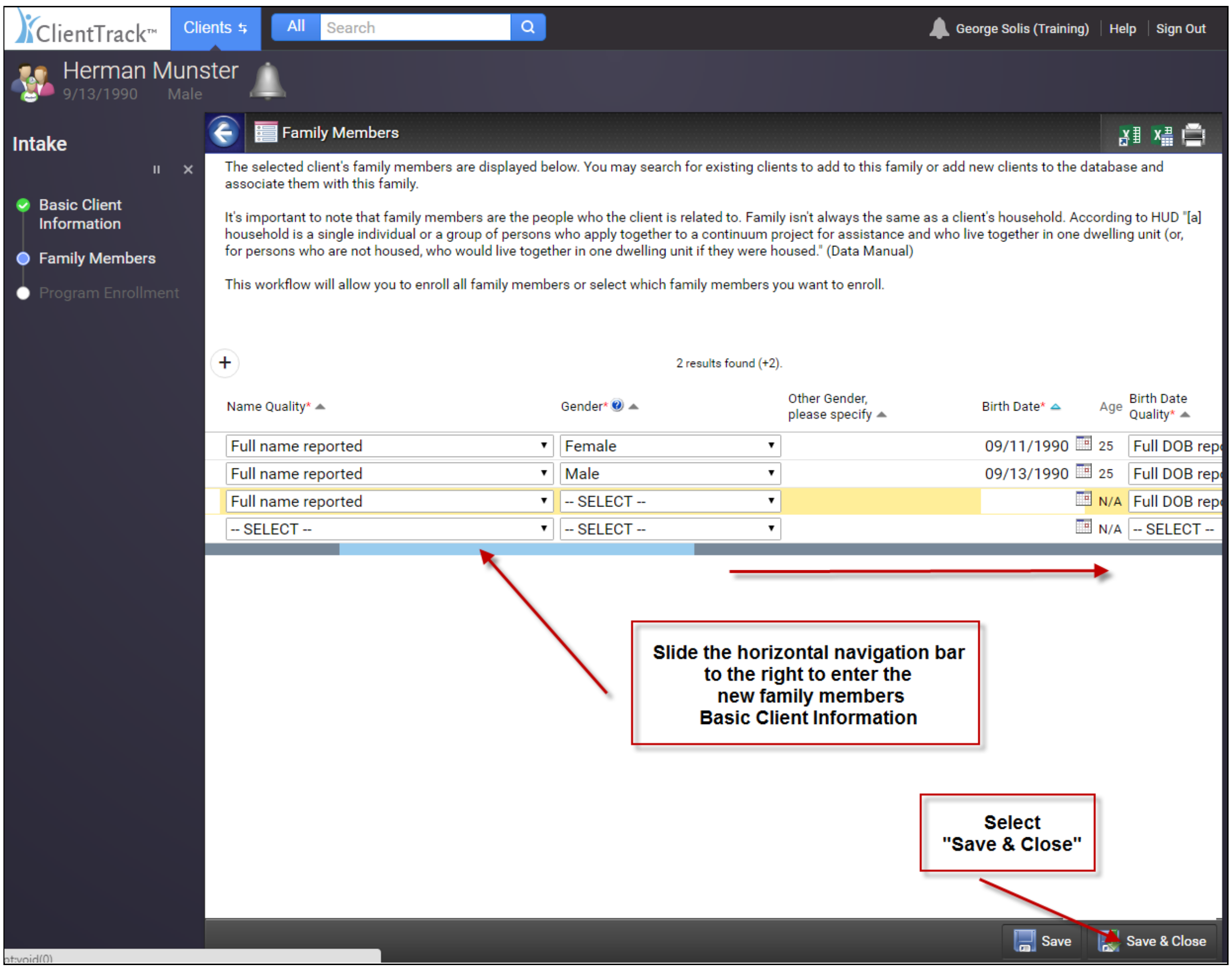
- The selected client's family members will display on the screen
- If there are no changes select "Save & Close"



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.

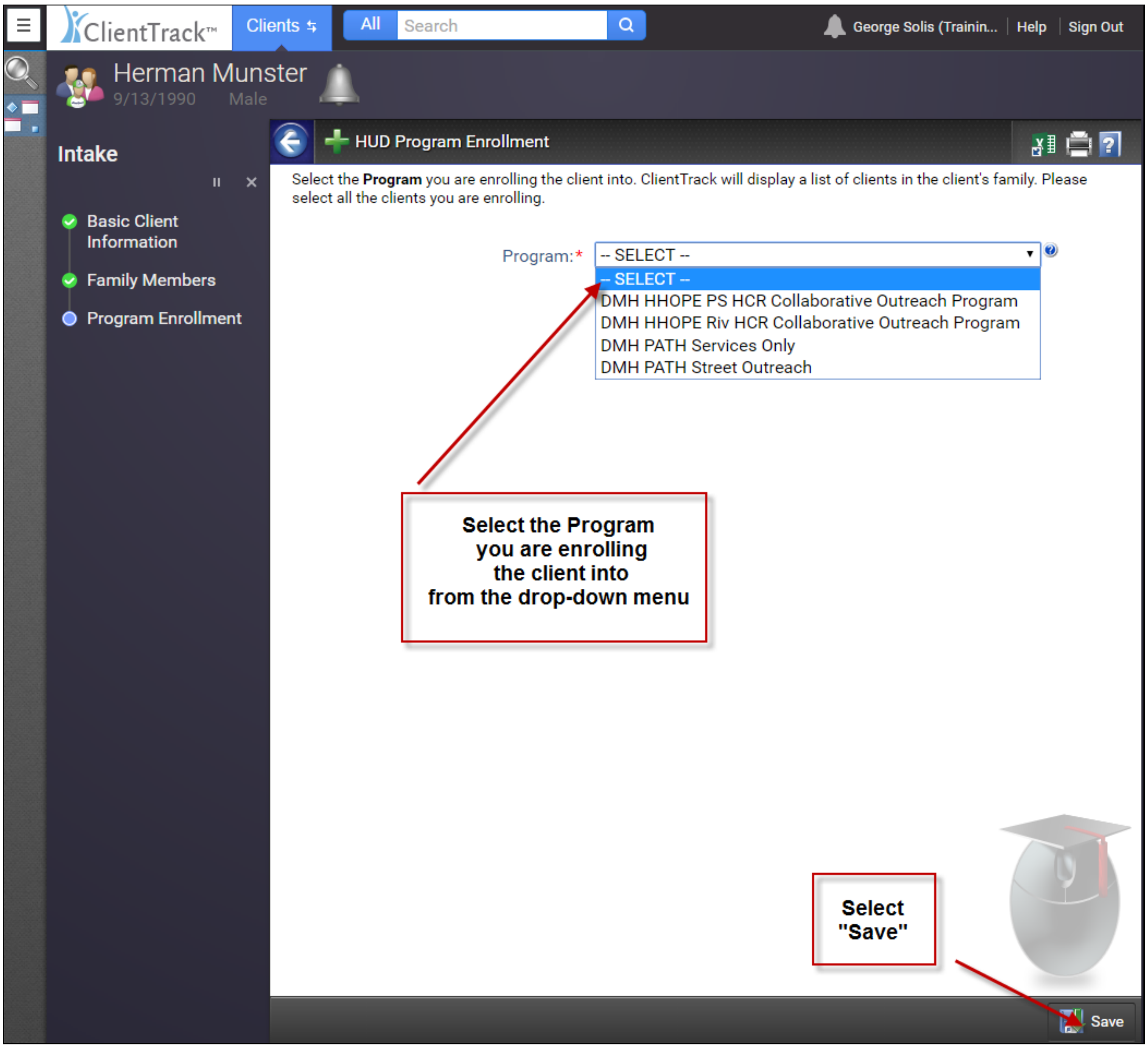
- Select the box below the client's name
- Enter partial identifying information (partial name **OR** last four of SSN **OR** birth date)
- Select the "Search icon" or use the "Tab" function on your keyboard
- A Find Client pop-up window will open
- If no records are found, slide the **horizontal navigation 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

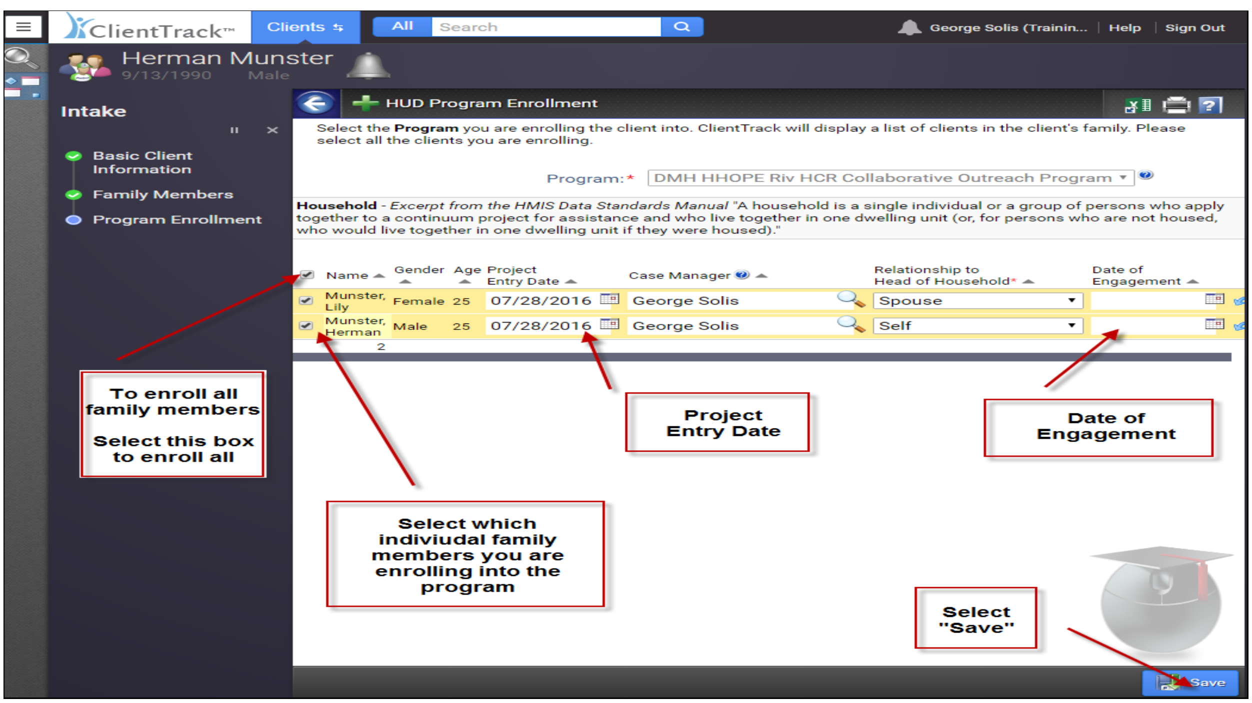
For Street Outreach projects this should be the date of first contact with the client.

4.13 Date of Engagement

An engagement date is the date when an interactive client relationship results in a deliberate client assessment or beginning of a case plan. The date of engagement should be entered into HMIS at the point when the client has been engaged by the outreach worker. This date may be on or after the project entry date and must be prior to project exit. If the client exits without becoming engaged, the engagement date should be left blank. If the client was contacted on the date of engagement, a contact must also be entered for that date.

Reporting to HUD on data quality for street outreach projects is limited to clients with a date of engagement. Therefore, it is important that when a worker records the date of engagement he/she also reviews all of the Universal Data Elements and applicable Program Specific Data Elements for completeness and accuracy.

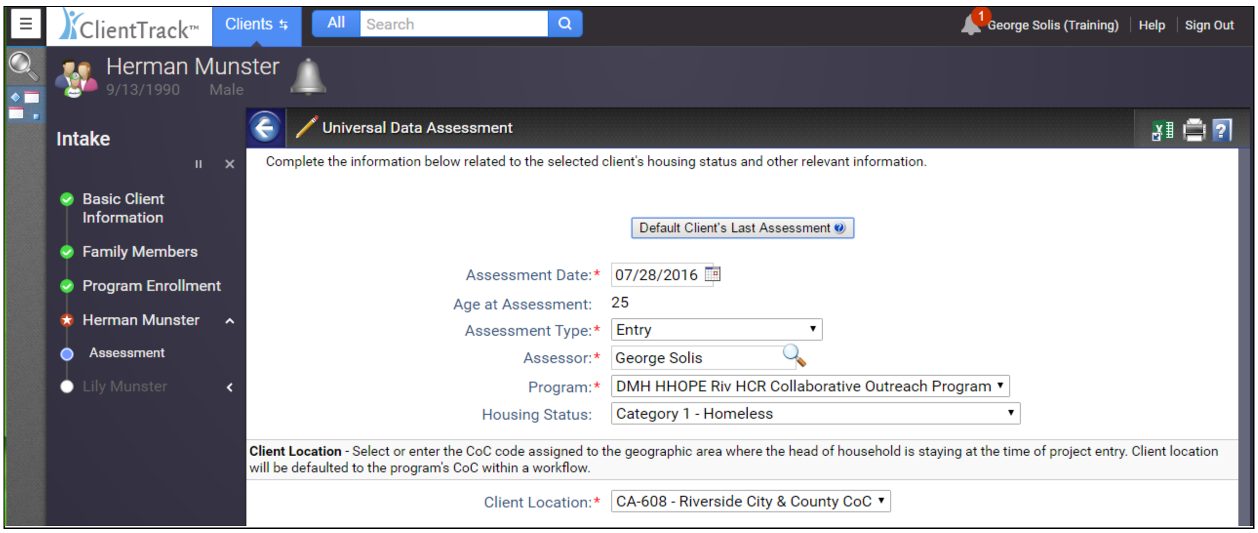
- Select which family members you are enrolling into the program by checking the box next to their name
- To select all family members, check the box above the list of names
- Project Entry Date will populate to the current date once you select the family members you are enrolling
- Enter Date of Engagement if engagement has been made. If not, leave blank
- 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

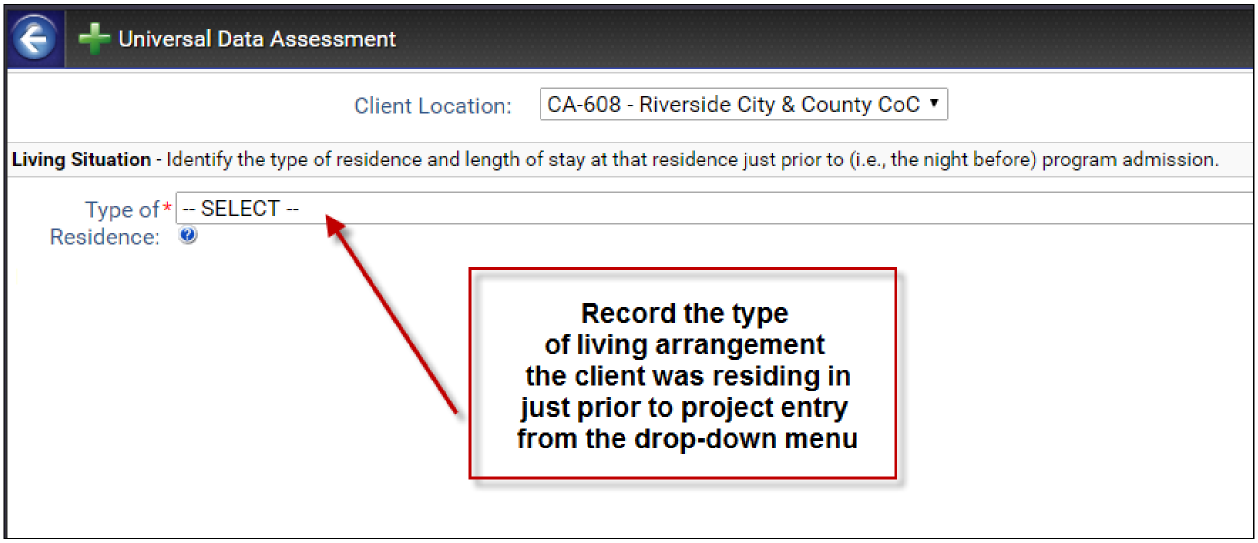


3.917A Living Situation

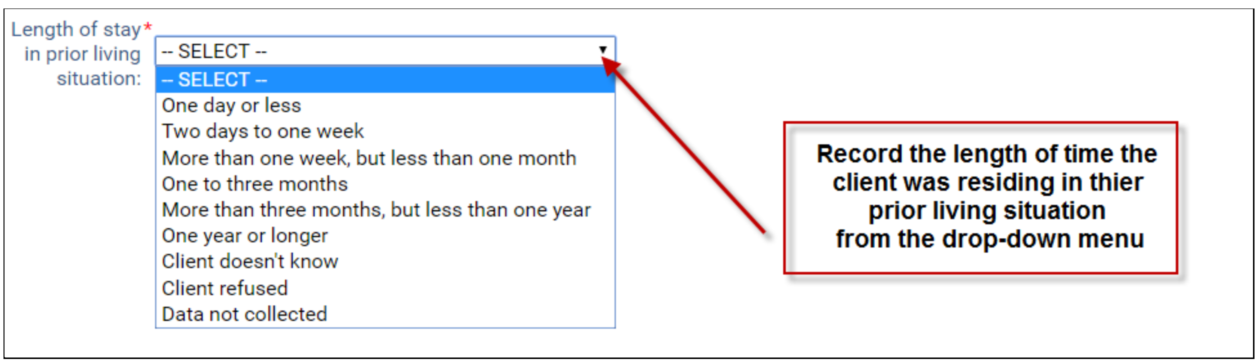
This element is used to identify the type of living situation and length of stay in that situation just prior to entry into a Street Outreach project for all adults and heads of households. This data, along with disabling condition is used to identify whether a client meets the criteria for chronic homelessness.

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.

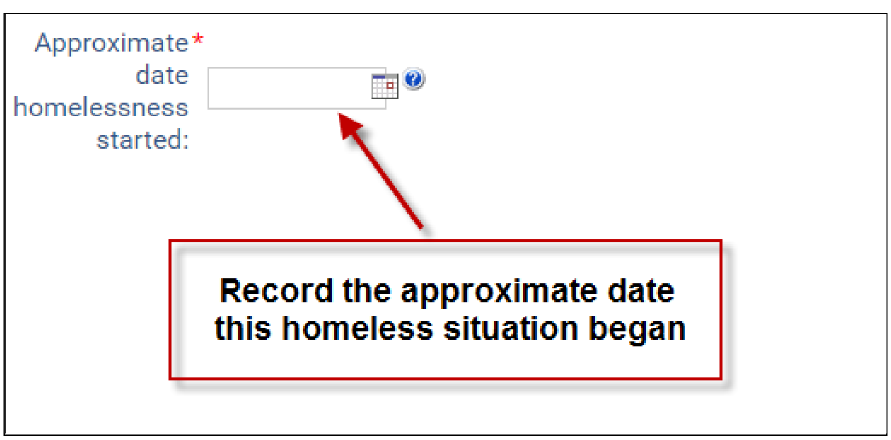
- Record the type of living arrangement of the head of household and each adult household member was residing in just prior to entry into the Street Outreach, ES, or SH project from the drop-down menu. The living situations have been divided into three different situations: Homeless; Institutional; and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



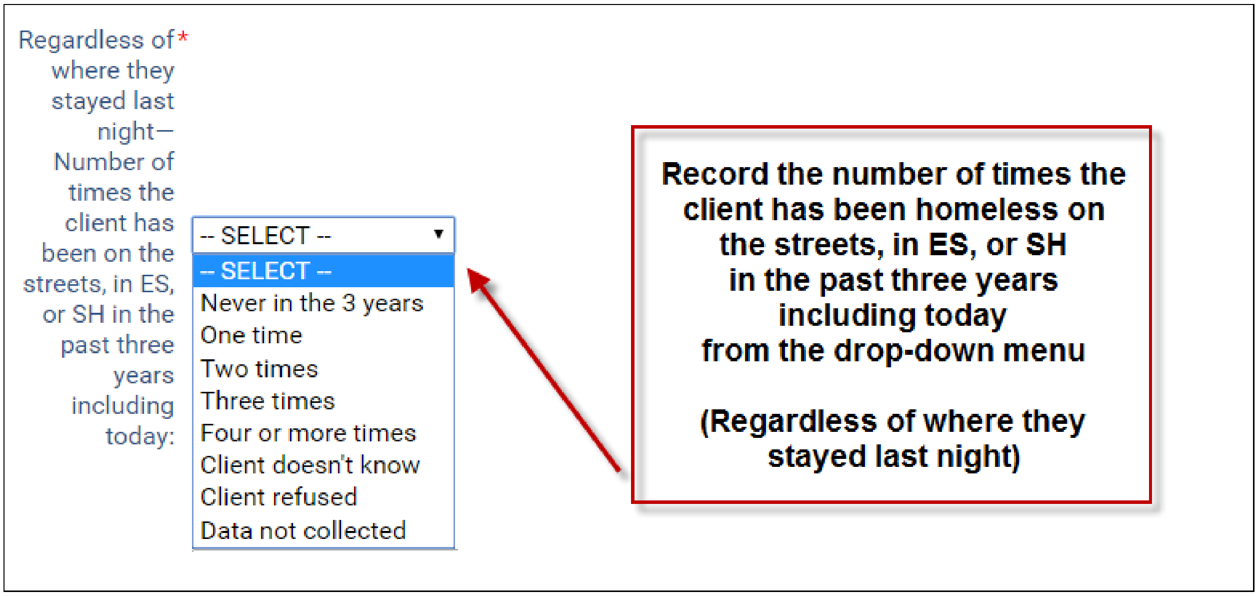
➢ Record the length of time the client was residing in their prior living situation from the drop-down menu.



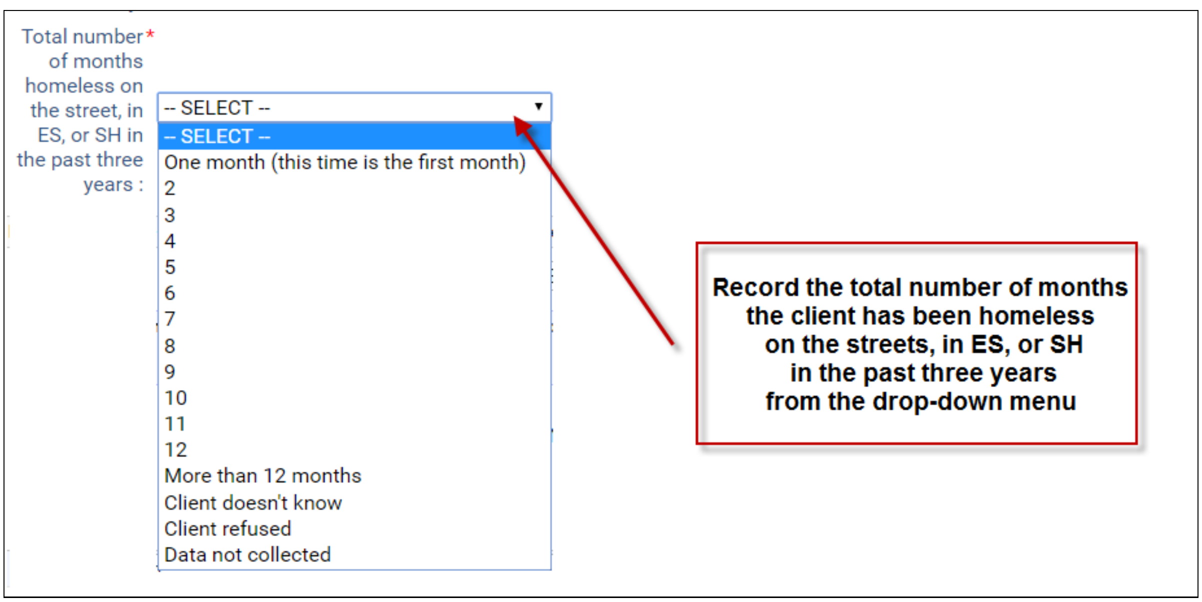
➢ Record the Approximate date this homeless situation began. Have the client look back to the date of the last time the client had a place to sleep that was not on the streets, ES, or SH and enter that date.



➢ 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)*



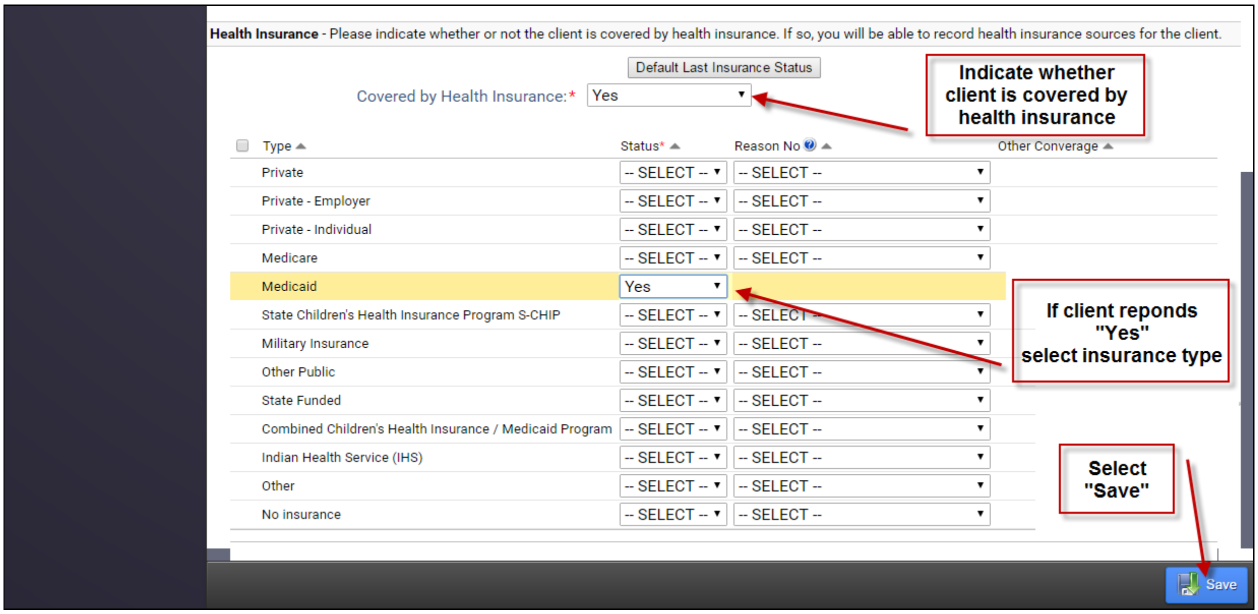
➢ Record the **total number of months** homeless the client has been on the streets, in ES or SH in the past three years from the drop-down menu. *(The number of cumulative, but not necessarily consecutive months spent homeless.)*



4.4 Health Insurance

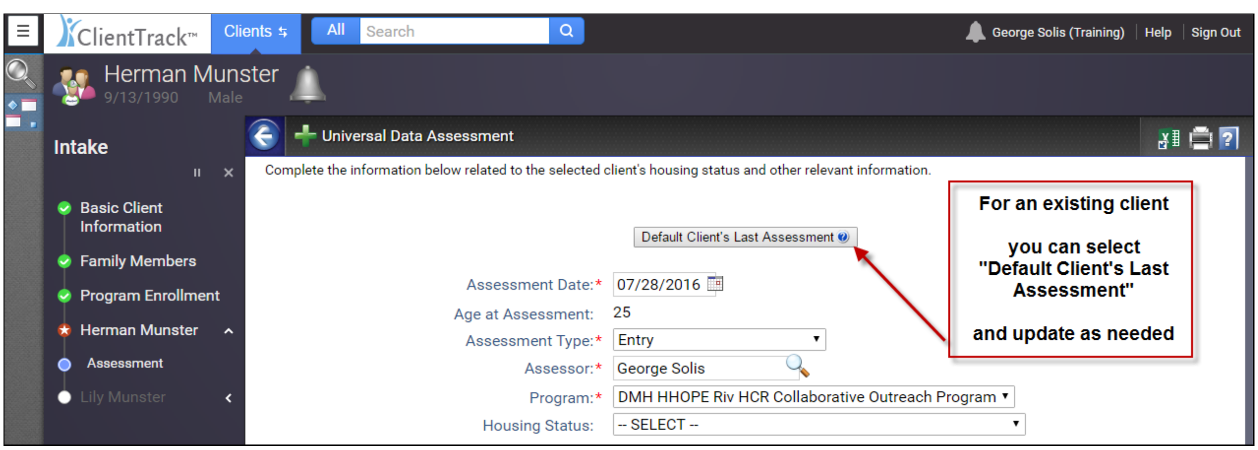
Health insurance information is important to determine whether clients currently have health insurance coverage and are accessing all mainstream project medical assistance benefits for which they may be eligible, and to ascertain a more complete picture of their economic circumstances.

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



Existing Client Record

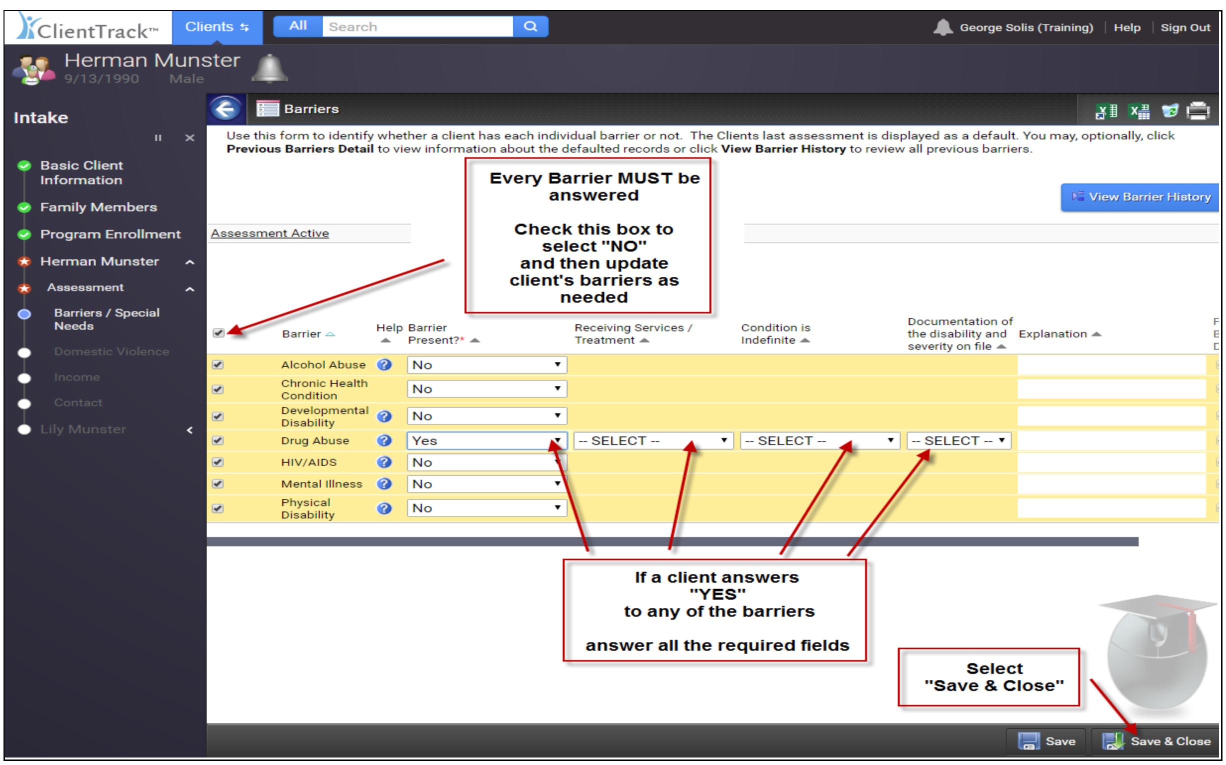
- Select "Default Client's Last Assessment" to populate response fields
- Update and verify client responses



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.

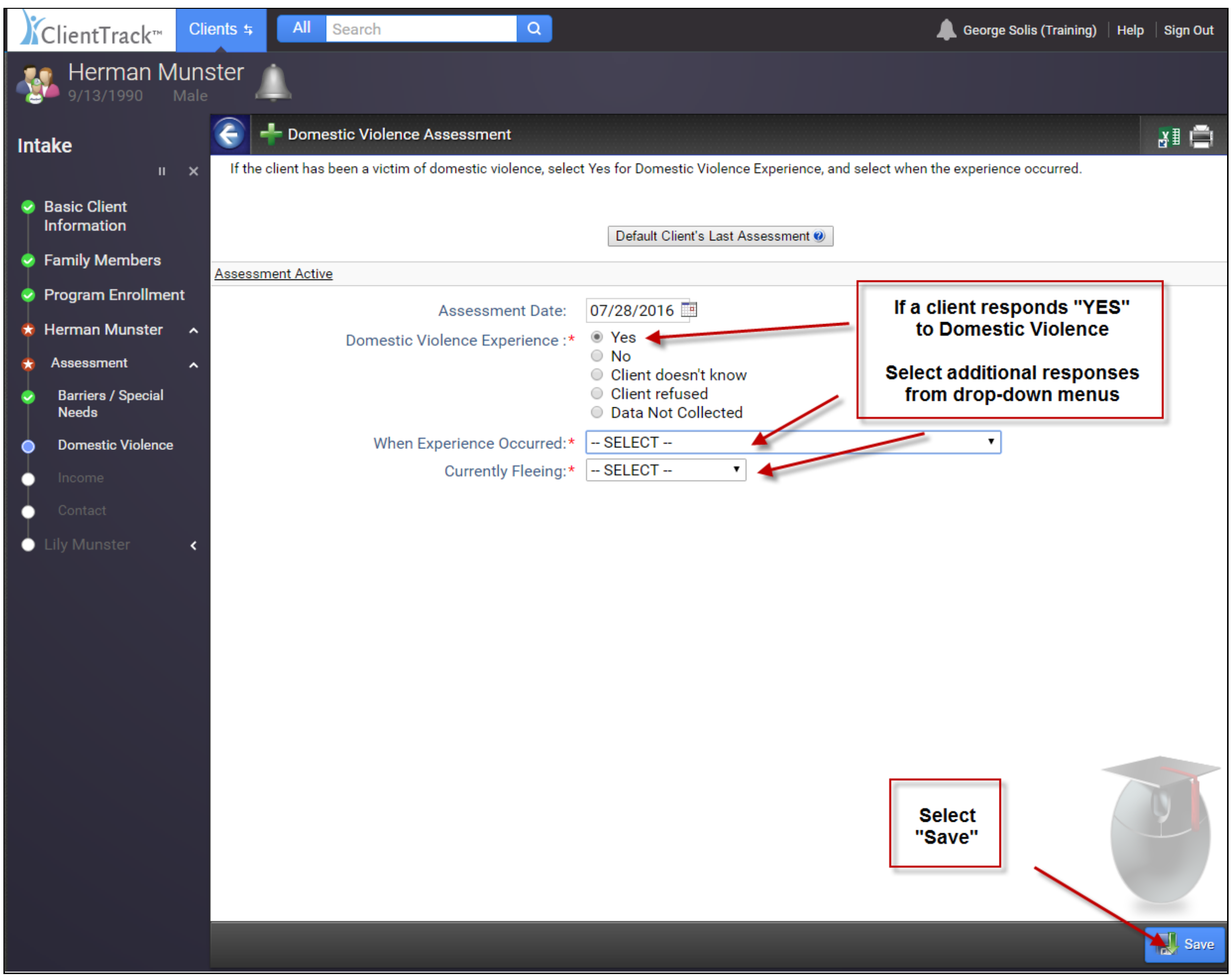
- A response must be recorded for every barrier
    - 4.10 Substance Abuse – Alcohol/ Drug
    - 4.7 Chronic Health Condition
    - 4.6 Developmental Disability
    - 4.8 HIV/AIDS
    - 4.9 Mental Health Problem
    - 4.5 Physical Disability
- Select box above list of barriers to select all barrier's; 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.

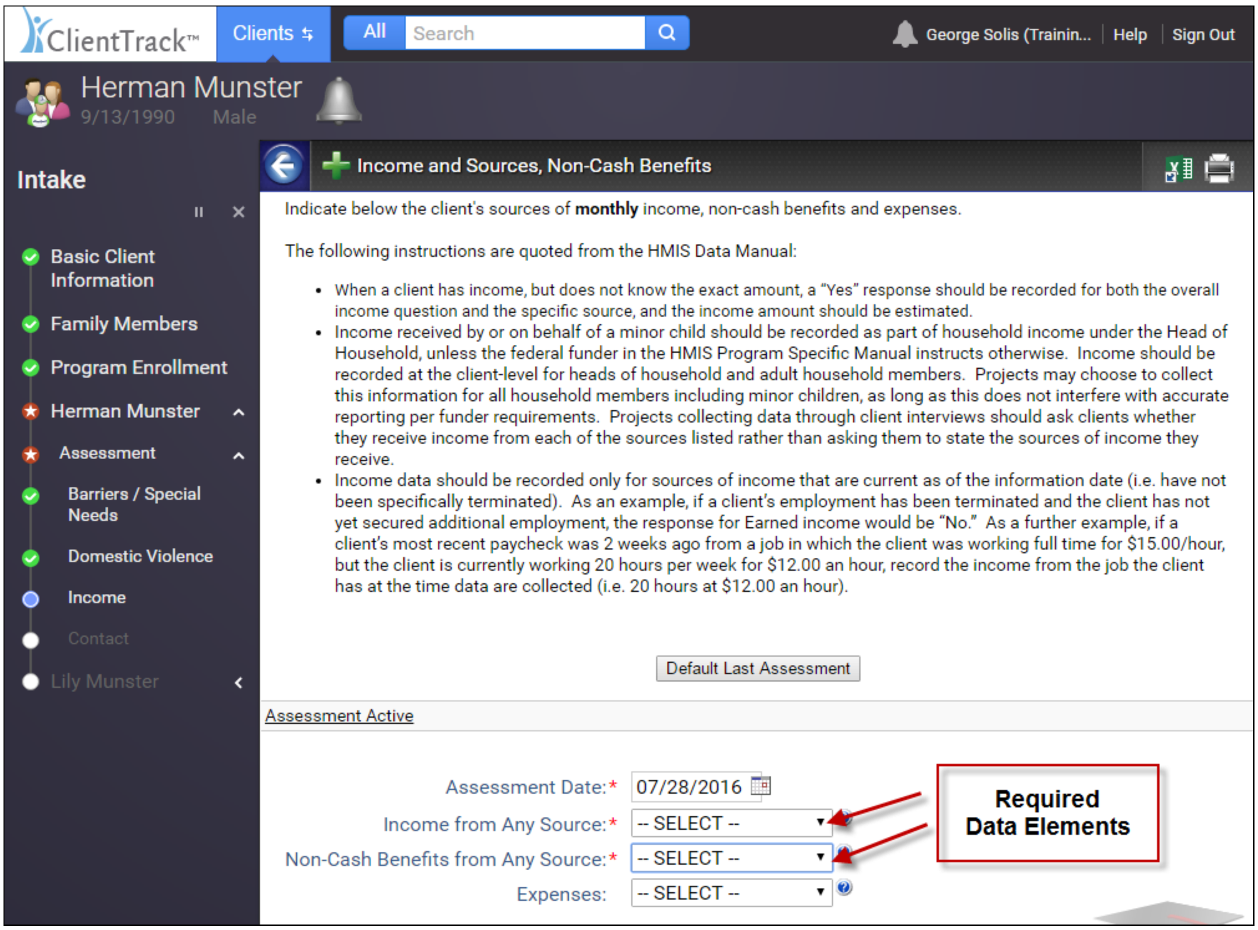
- Indicate whether client has ever experienced Domestic Violence
- If Client responds "Yes," collect responses to the following fields:
    - When Experience Occurred
    - Currently Fleeing
- Select "Save"



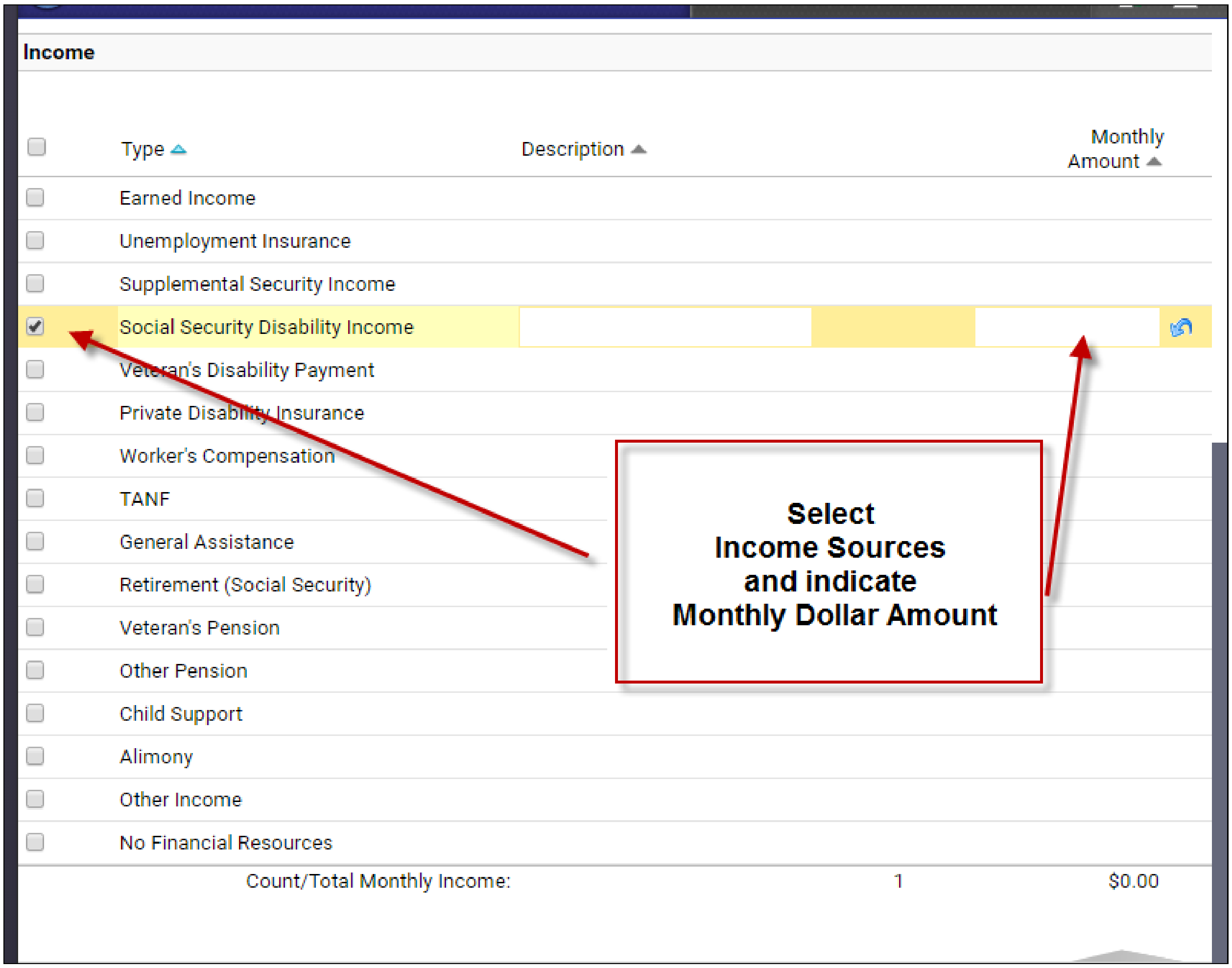
4.2 Income and Sources

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



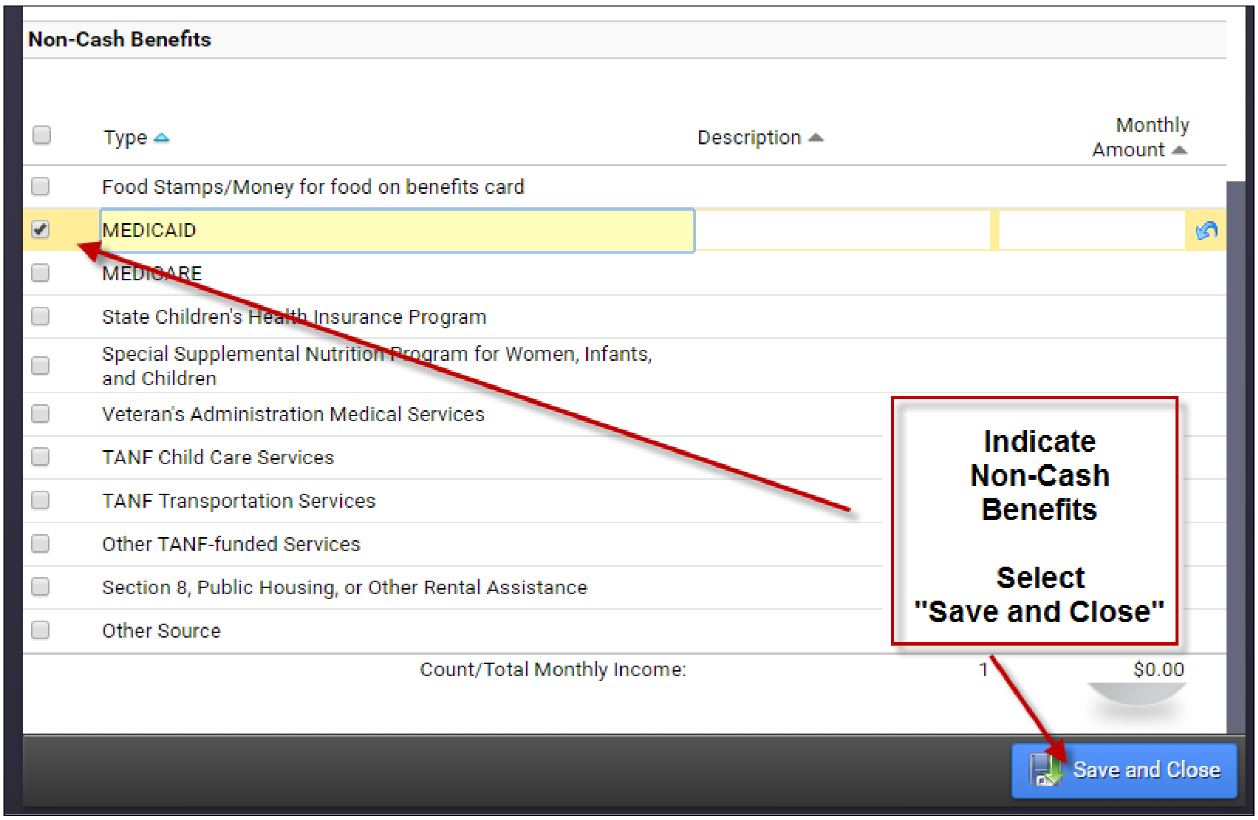
➢ If client responds “Yes,” indicate all sources and dollar amounts from the list of income sources that apply



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.

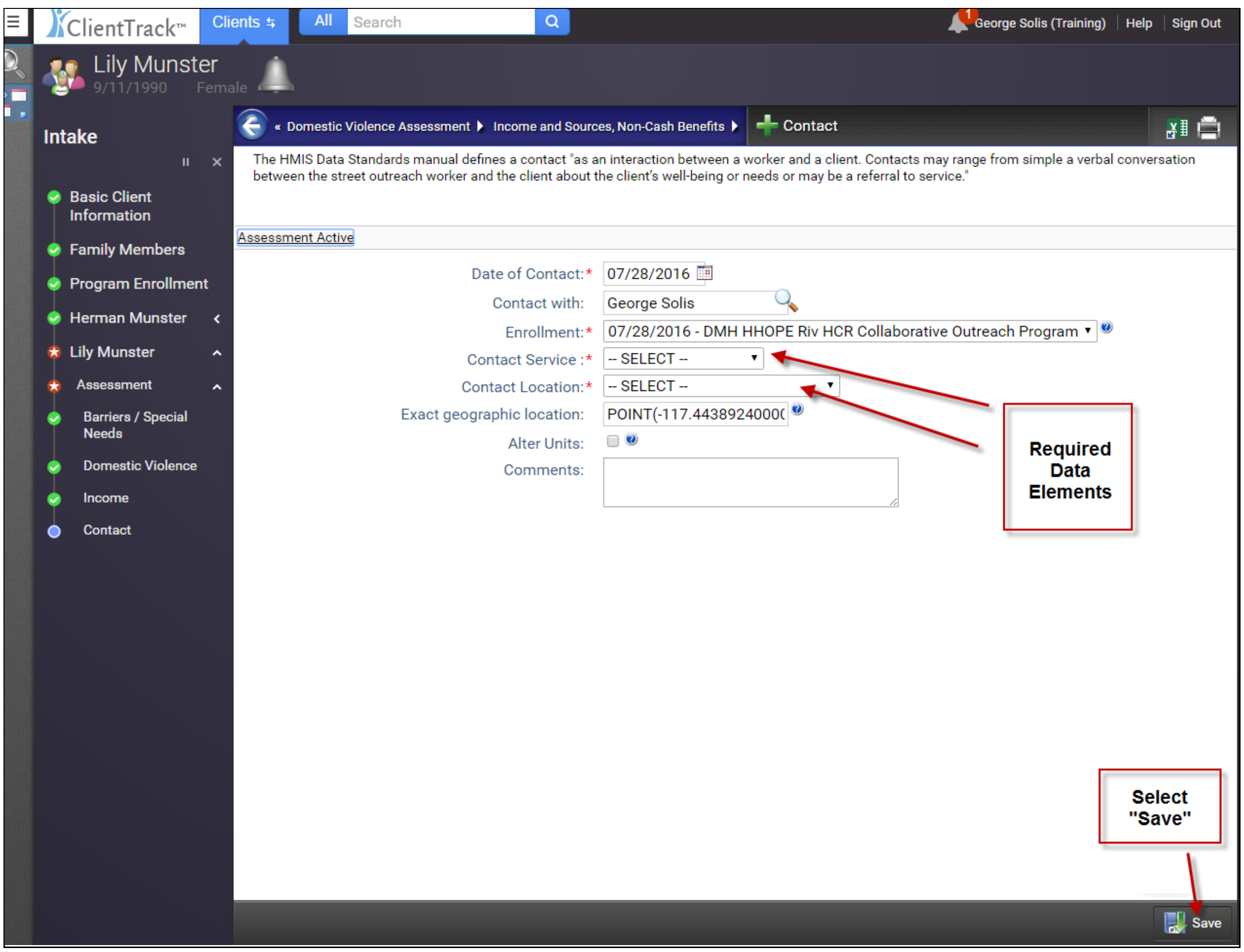
- Indicate whether client receives non-cash benefits from drop-down menu
- If client responds "Yes," indicate non-cash benefits from the list of sources that apply
- "Food Stamps/ Money for food on benefits card" is the only category that requires a monthly dollar amount
- Select "Save and Close"



4.12 Contact

A street outreach project is expected to record every contact made with each client in the HMIS. A contact is defined as an interaction between a worker and a client designed to engage the client. Contacts may include activities such as a conversation between the street outreach worker and the client about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service. A contact must be recorded anytime a client is met, including when an engagement date or project entry date is recorded on the same day.

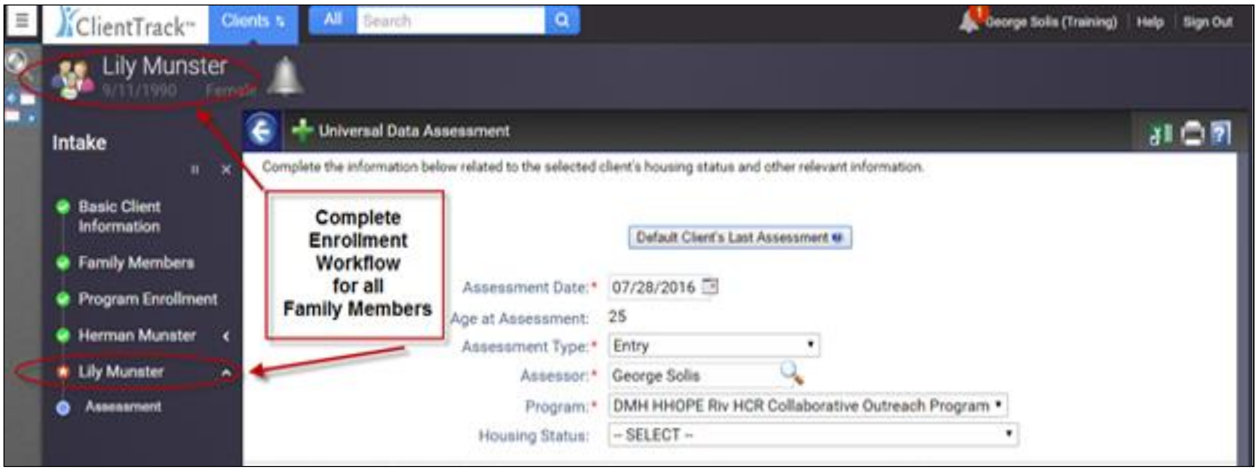
- Select "Outreach Contact" from Contact Service drop-down menu
- Select Contact Location from drop-down menu
- Select "Save"



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.

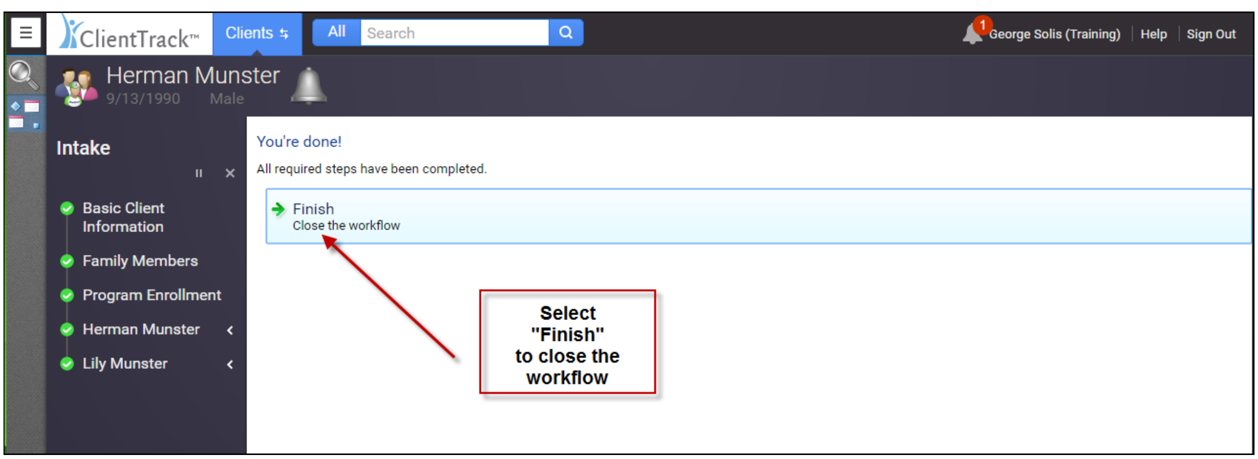
- Complete all steps in the Intake workflow for all family members



Completion of Intake

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

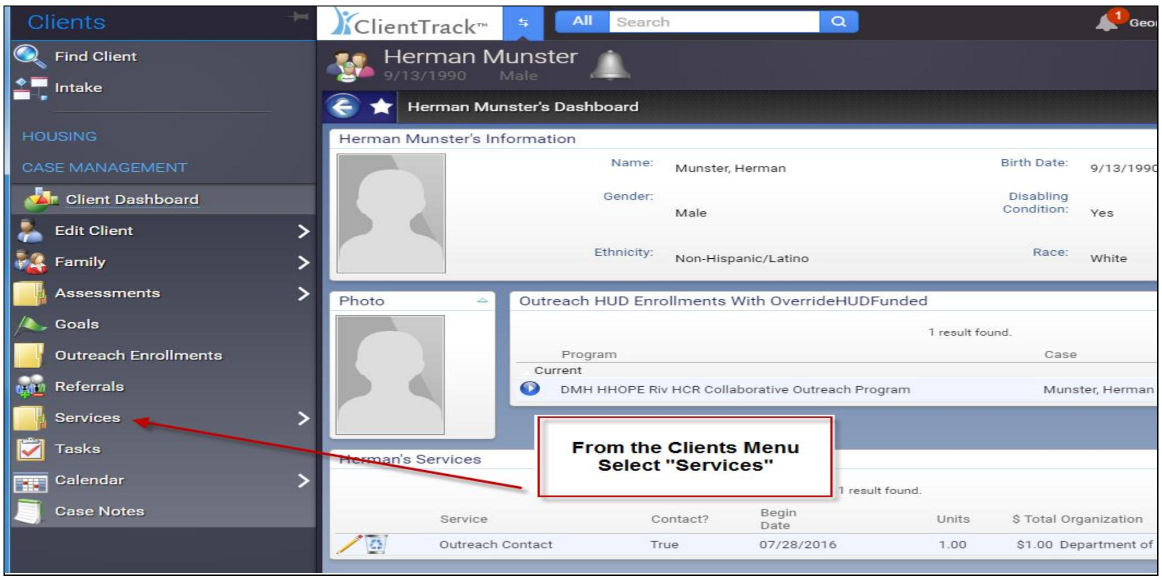
- Select "Finish" to close the workflow



Entering Contacts/ Services

A street outreach project is expected to record every contact made with each client in the HMIS. A contact is defined as an interaction between a worker and a client designed to engage the client. Contacts may include activities such as a conversation between the street outreach worker and the client about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service. A contact must be recorded anytime a client is met, including when an engagement date or project entry date is recorded on the same day.

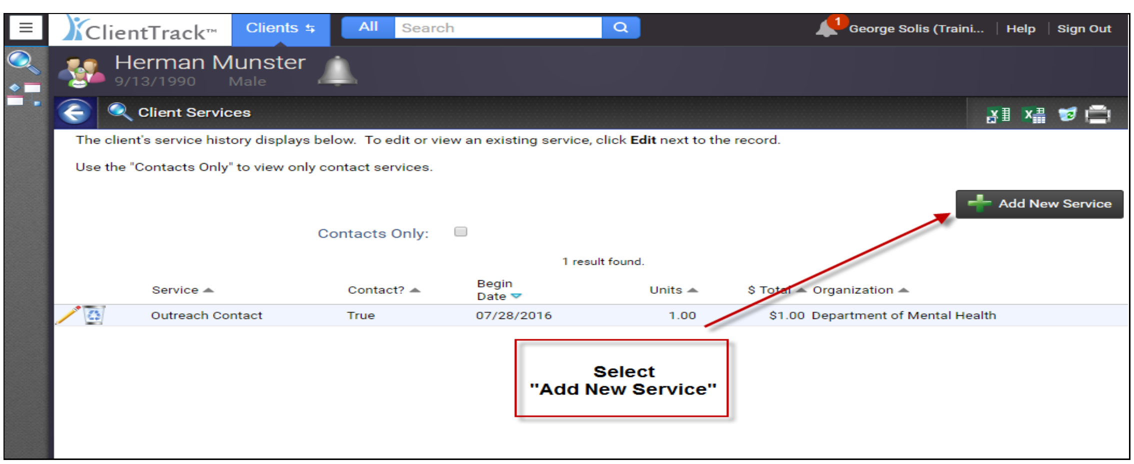
- ➢ Select "Services" from the Clients Menu to navigate to the Client Services screen



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

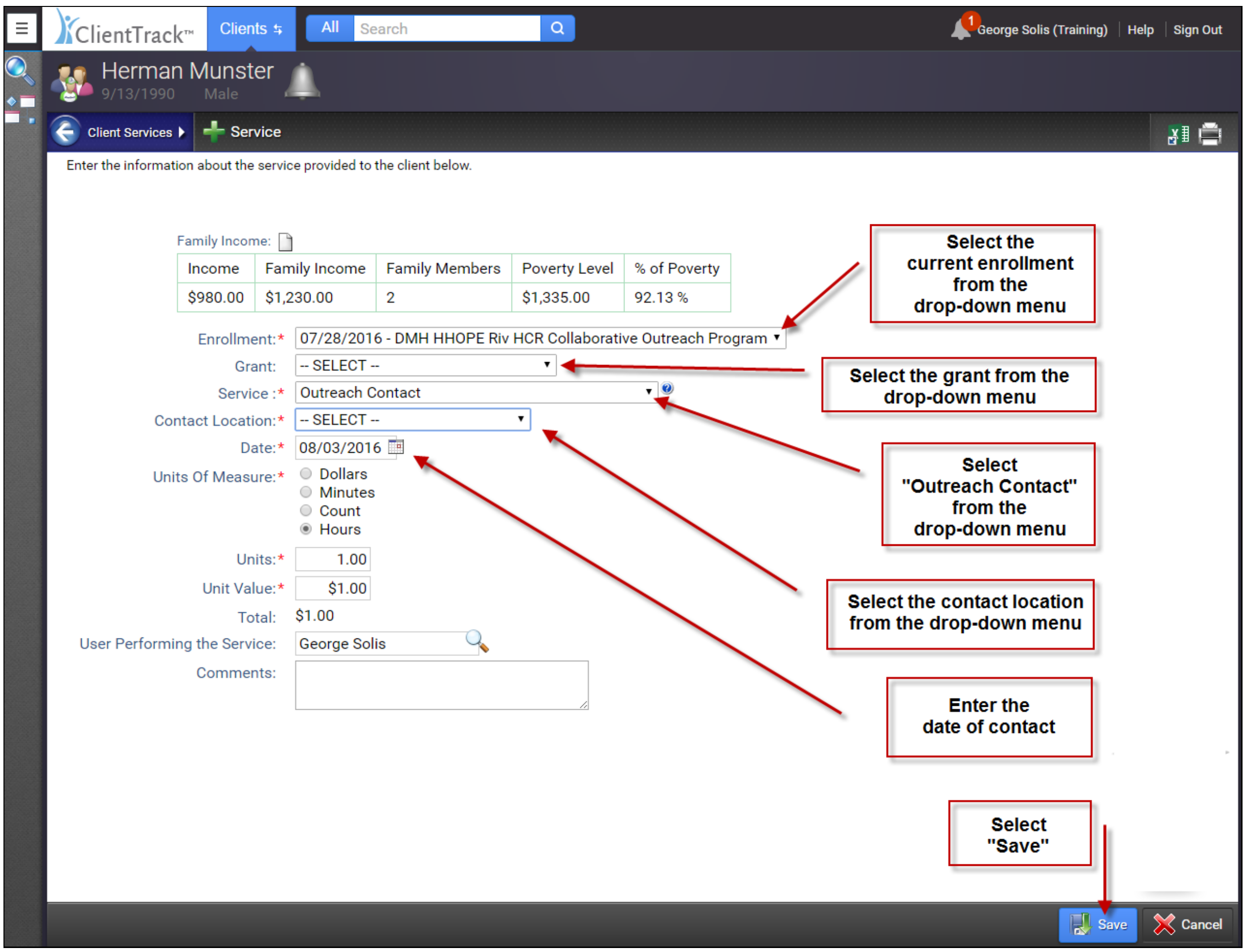
Clients Services Screen

- ➢ Select "Add New Service"



Service Screen

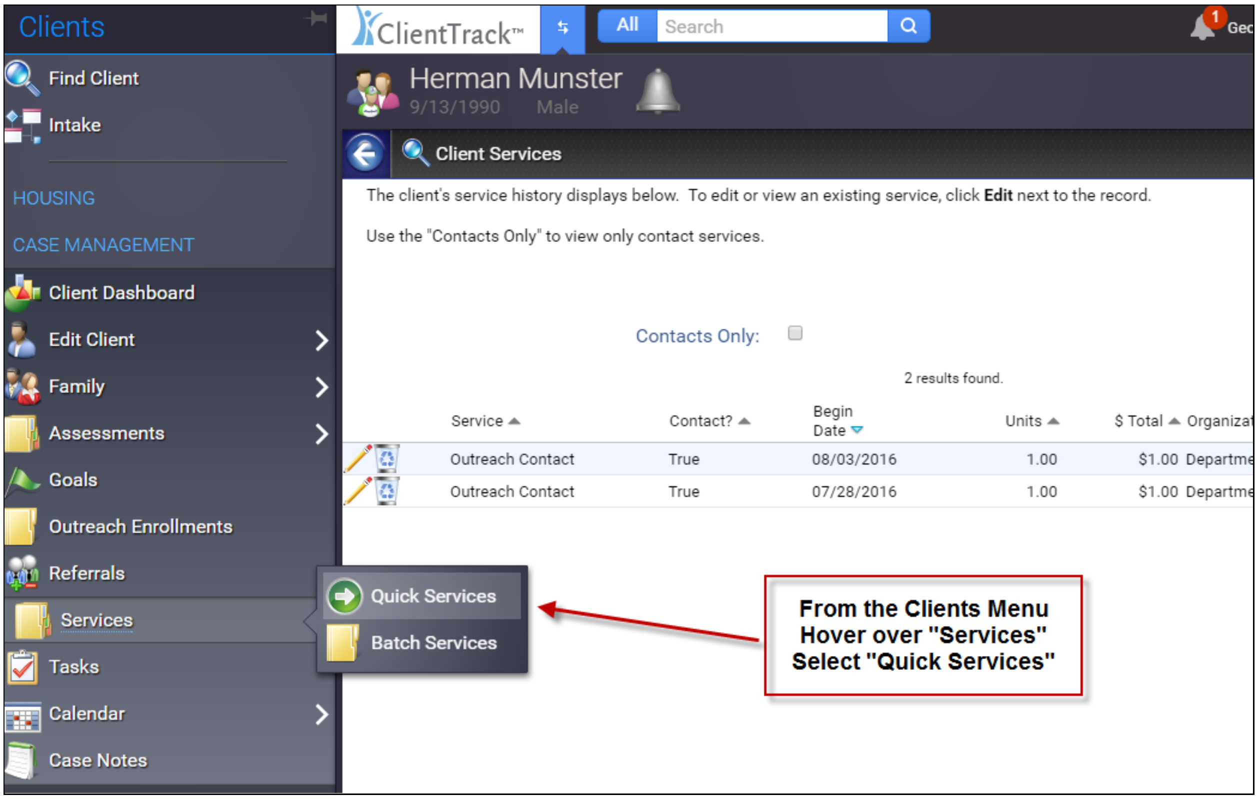
- Select the current enrollment from the drop-down menu to link the contact/ service with the appropriate enrollment
- Select the grant from the drop-down menu to link the contact/service with the appropriate grant
- Select "Outreach Contact" from the drop-down menu of Services
- Select the contact location from the drop-down menu
- Enter the contact date
- Verify Units of Measure, Units and Units Value
- Select "Save"



Entering Multiple Services

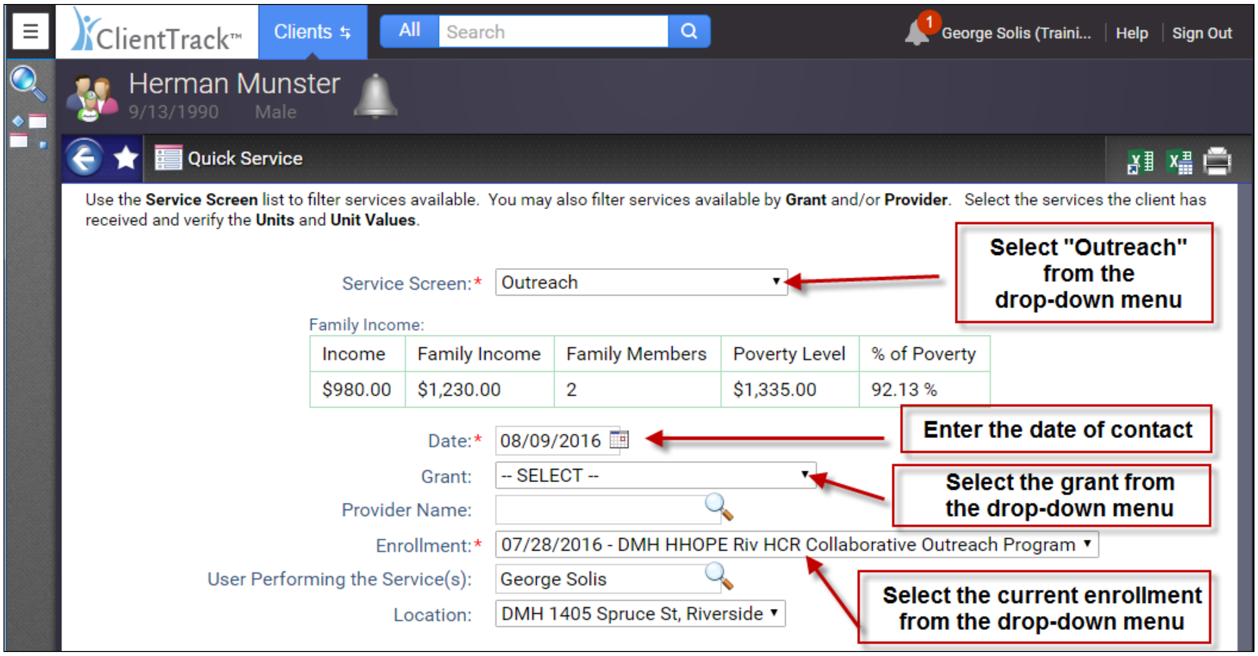
Utilizing "Quick Services" is an expedient way to enter multiple services for a client that occurred on the same day, rather than entering one service at a time.

- Hover over "Services" from the Clients Menu
- Select "Quick Services" to navigate to the Quick Services screen

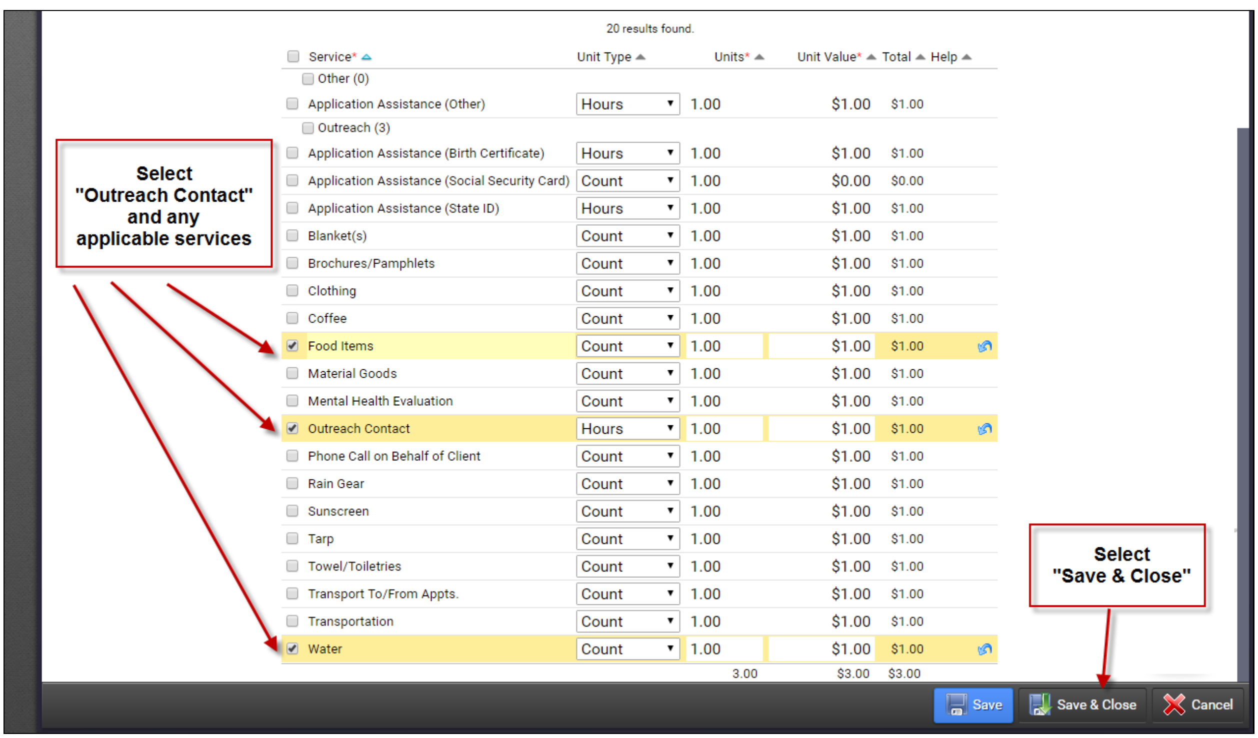


Quick Service Screen

- Select "Outreach" from the Service Screen drop-down menu to populate the list of Outreach services
- Enter the date of contact/ service
- Select the grant from the drop-down menu to link the contact/service with the appropriate grant
- Select the current enrollment from the drop-down menu to link the contact/ service with the appropriate enrollment



- Select "Outreach Contact" and any applicable services from the list of services
- Verify Unit Type, Units and Unit Value
- Select "Save & Close"

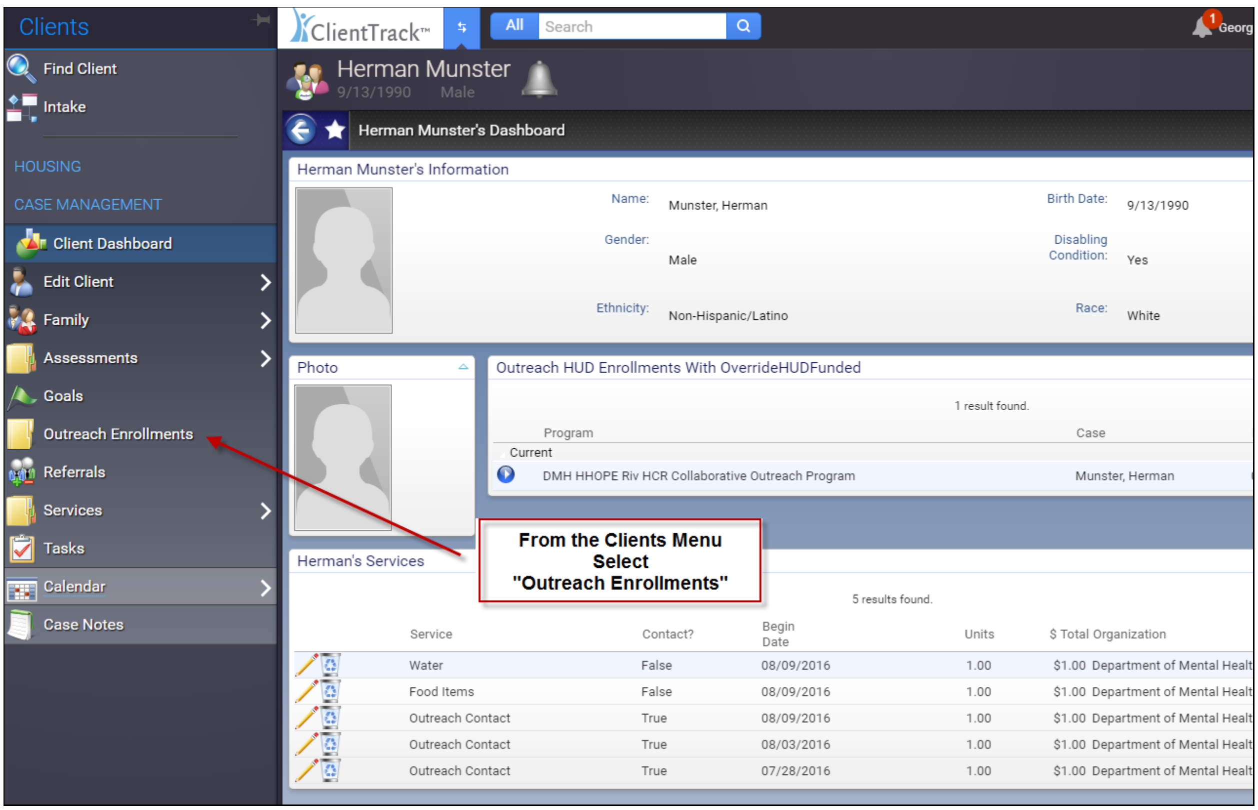


Entering Date of Engagement

An engagement date is the date when an interactive client relationship results in a deliberate client assessment or beginning of a case plan. The date of engagement should be entered into HMIS at the point when the client has been engaged by the outreach worker. This date may be on or after the project entry date and must be prior to project exit. If the client exits without becoming engaged, the engagement date should be left blank. If the client was contacted on the date of engagement, a contact must also be entered for that date.

Reporting to HUD on data quality for street outreach projects is limited to clients with a date of engagement. Therefore, it is important that when a worker records the date of engagement he/she also reviews all of the Universal Data Elements and applicable Program Specific Data Elements for completeness and accuracy.

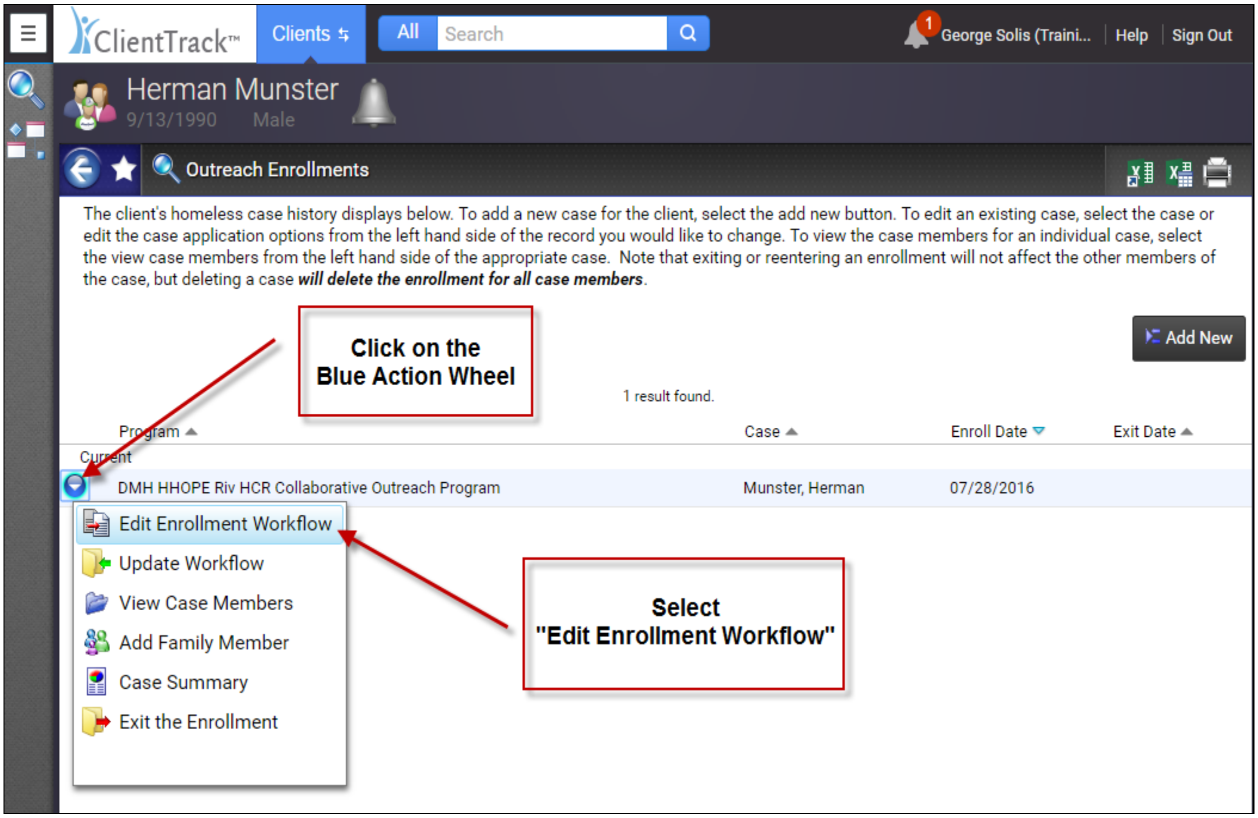
- Select "Outreach Enrollments" from the Clients Menu to navigate to the Outreach Enrollments screen



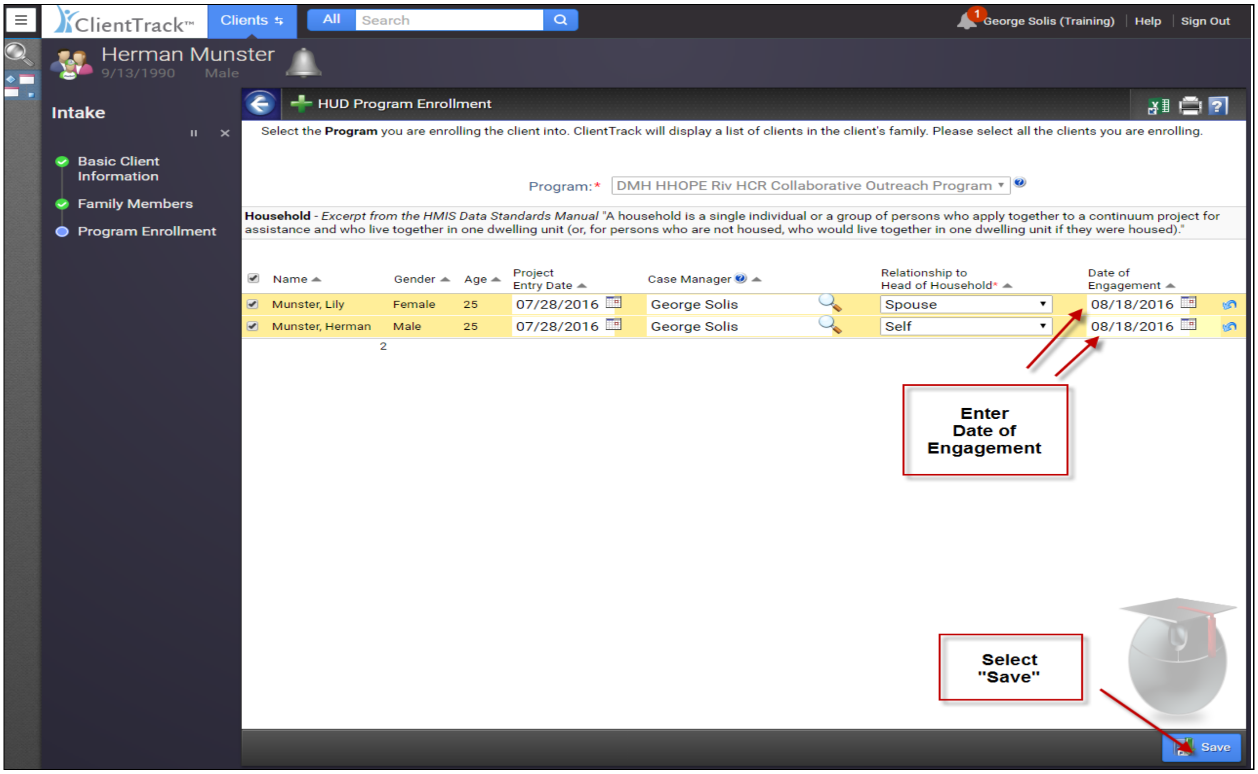
Outreach Enrollments Screen

- Click on the Blue Action Wheel
- Select "Edit Enrollment Workflow"

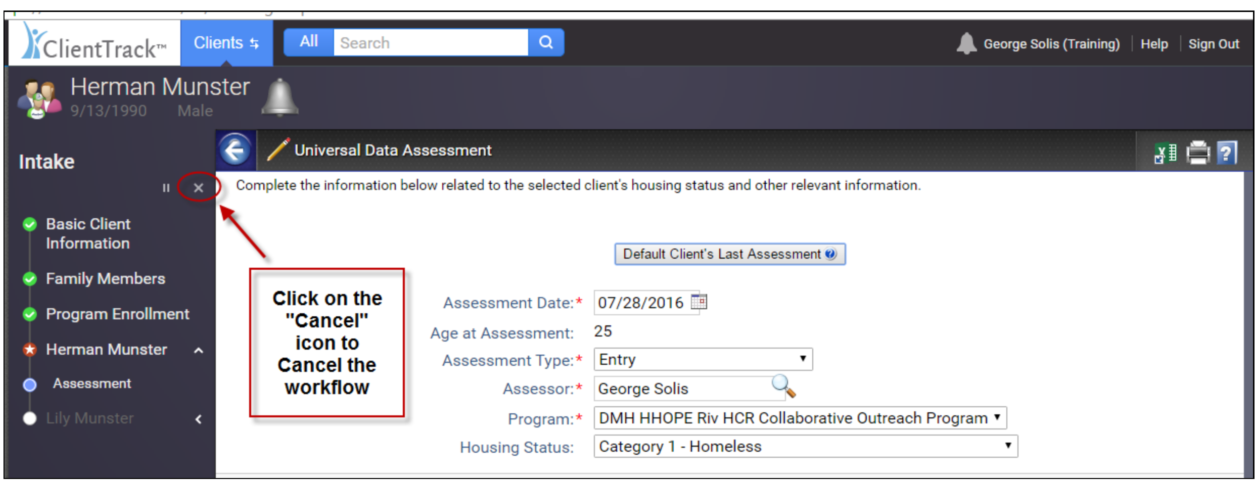
Note: You can also edit the enrollment workflow by clicking on the Blue Action Wheel from the Client's Dashboard



- Navigate through the enrollment workflow until you get to Program Enrollment screen
- Enter Date of Engagement
- Select "Save"



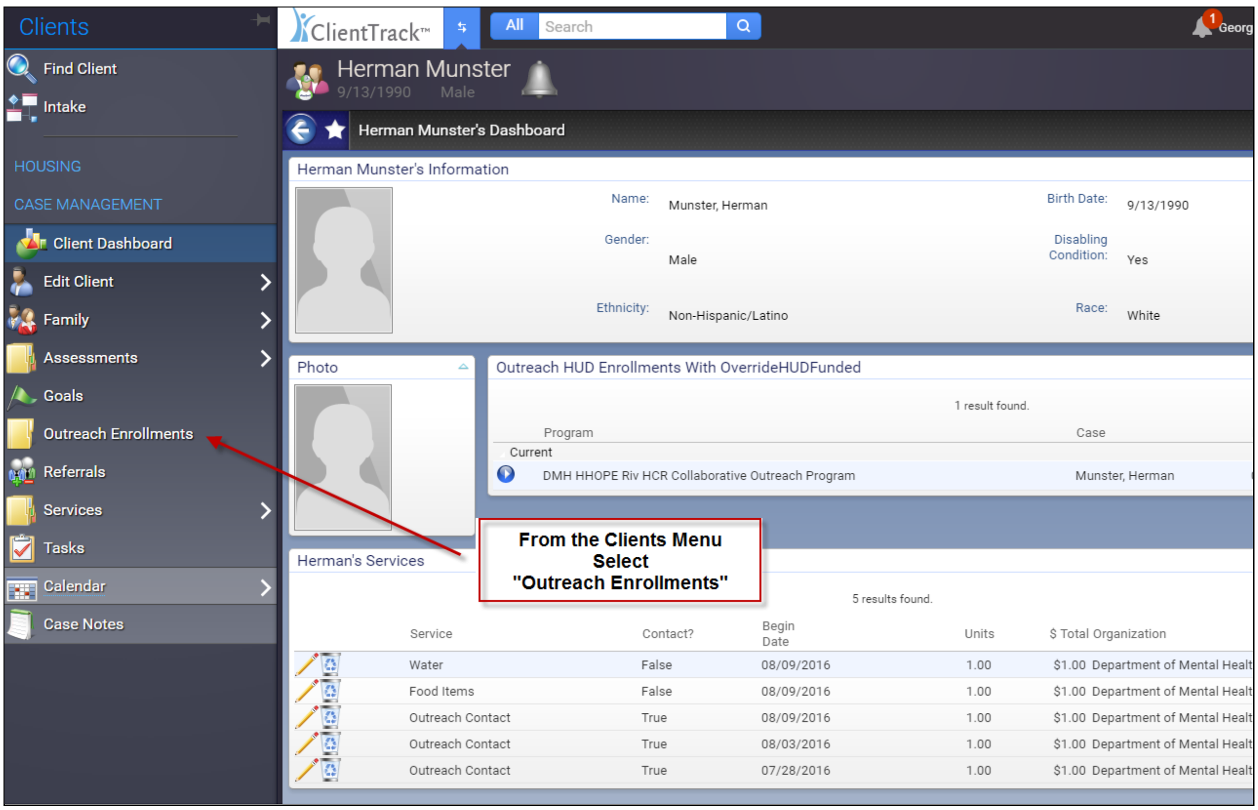
➢ From the Assessment screen, Click on the "Cancel" icon on the left hand navigation to cancel the workflow once the engagement date has been saved



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.

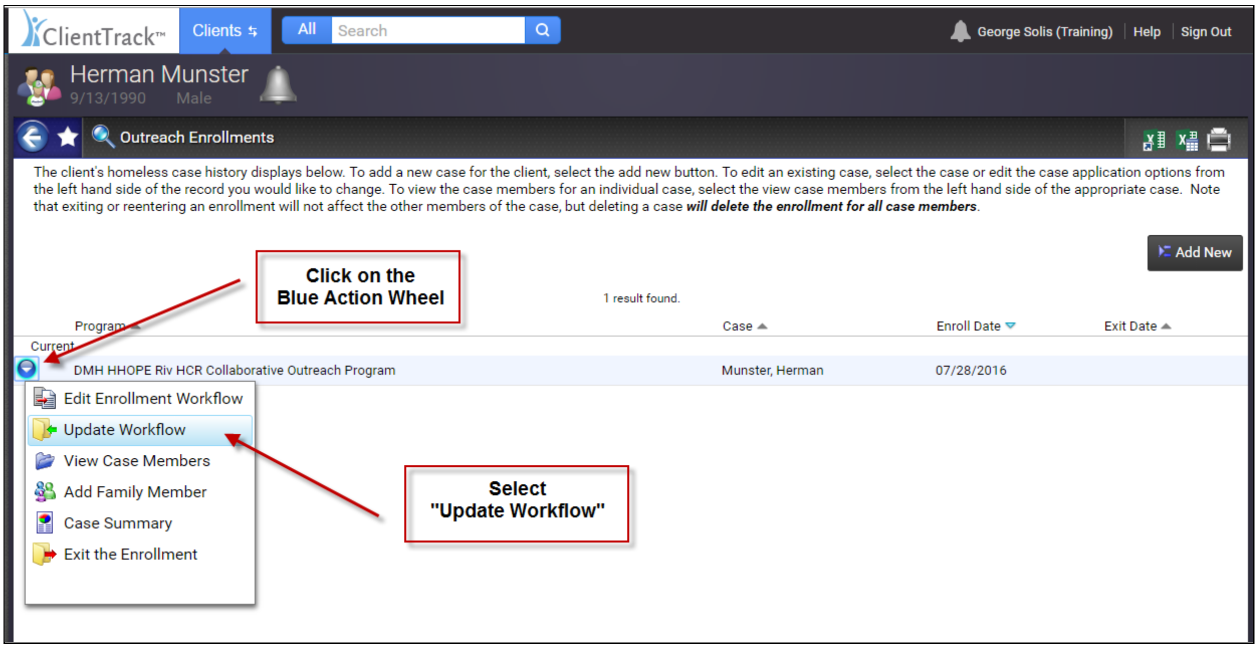
- Select "Outreach Enrollments" from the Clients Menu to navigate to the Outreach Enrollments screen



Outreach Enrollments Screen

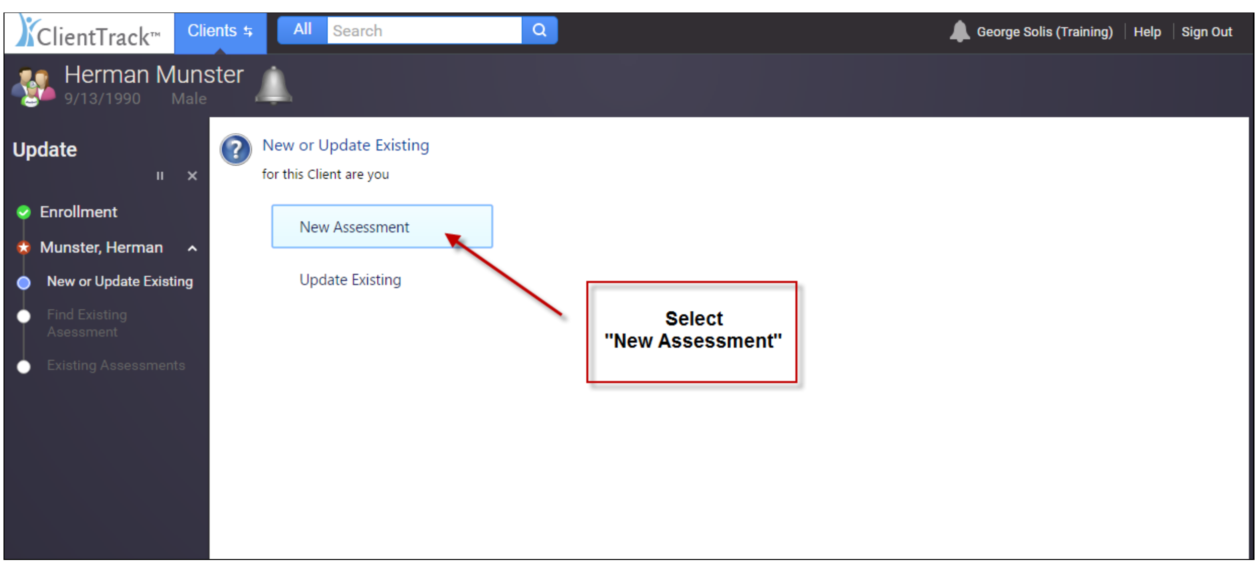
- ➢ Click on the Blue Action Wheel
- ➢ Select “Update Workflow”

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

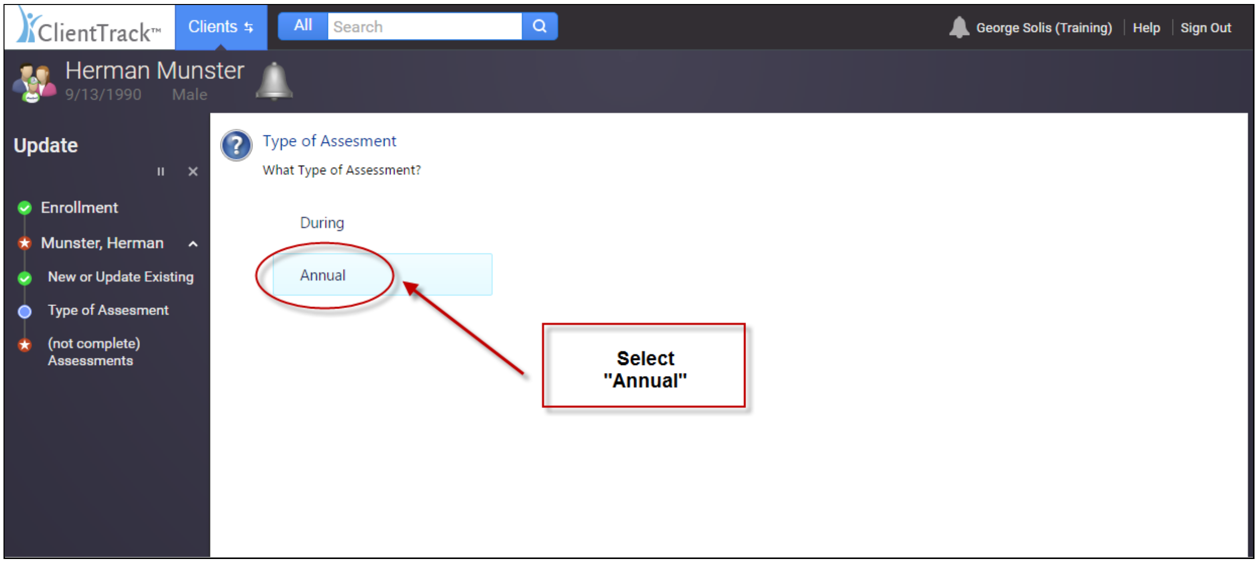


Update Screen

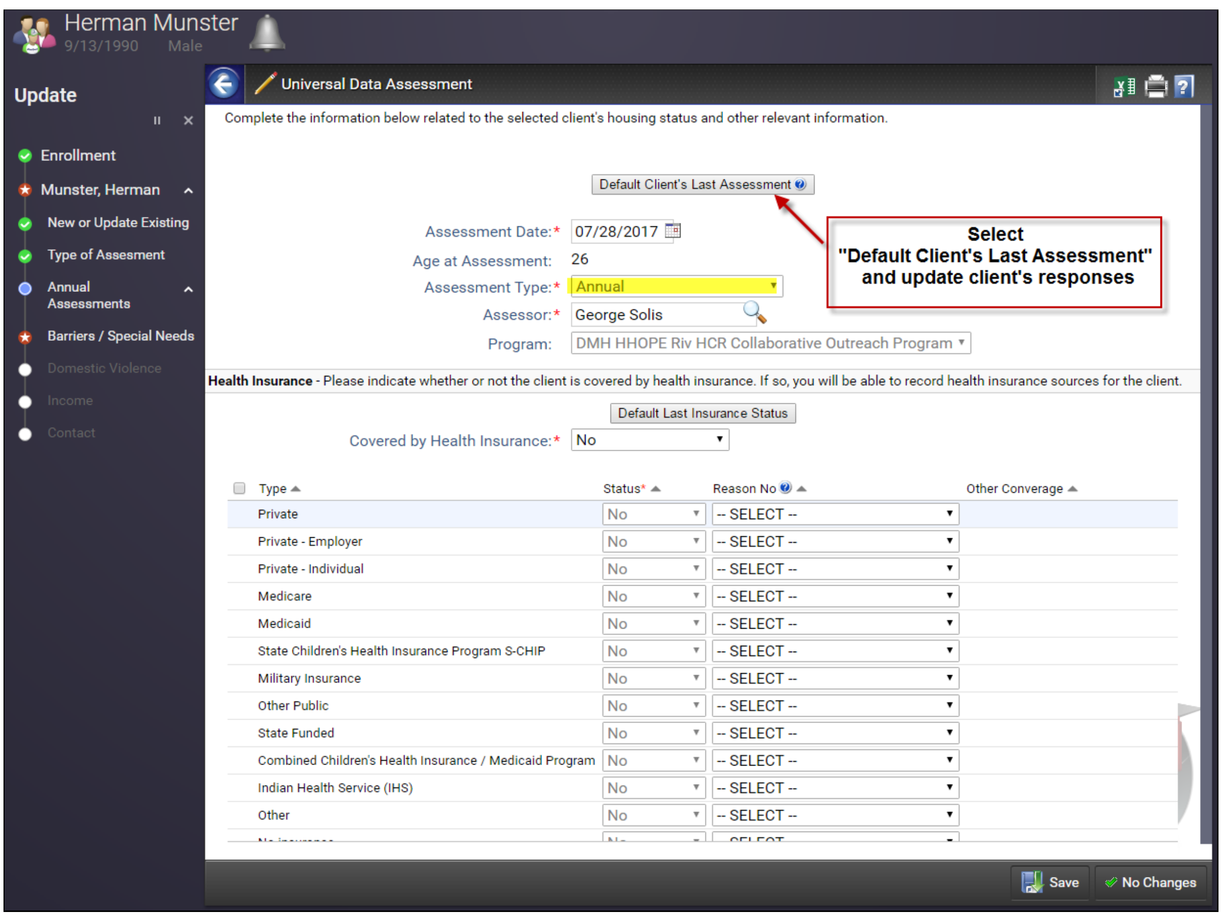
- ➢ Select “New Assessment”



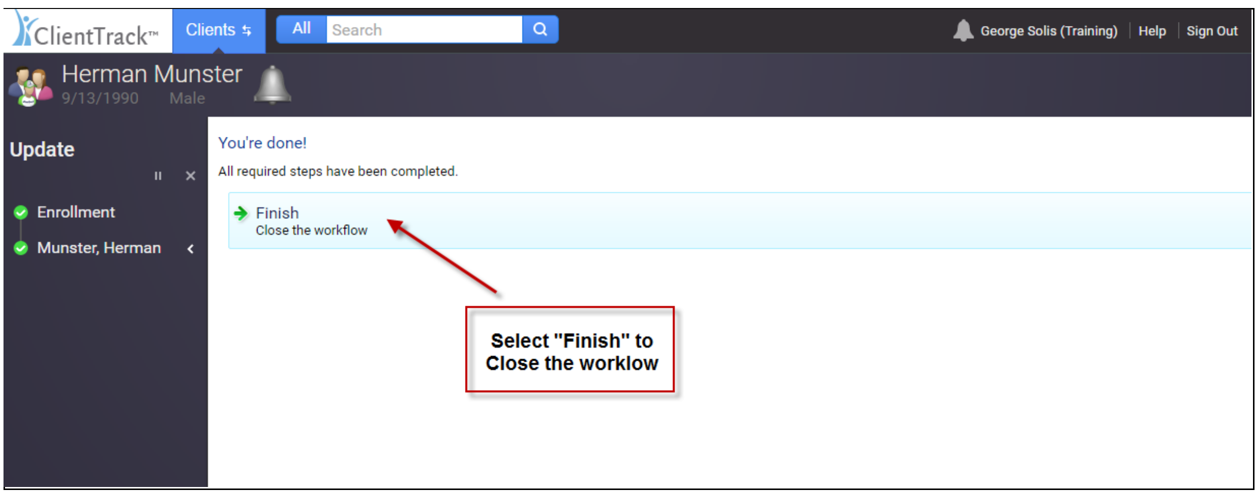
- Select “Annual”



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



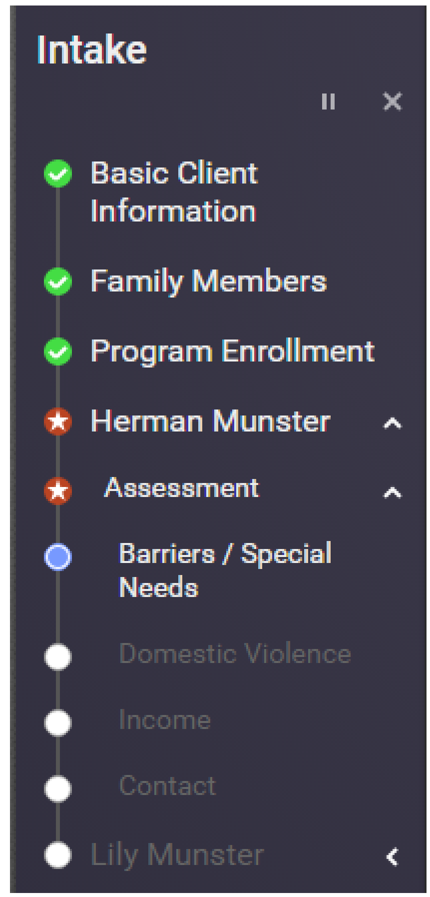
- Complete all steps in the Assessment workflow
    - 4.4 Health Insurance
    - 4.10 Substance Abuse – Alcohol/ Drug
    - 4.7 Chronic Health Condition
    - 4.6 Developmental Disability
    - 4.8 HIV/AIDS
    - 4.9 Mental Health Problem
    - 4.5 Physical Disability
    - 4.11 Domestic Violence
  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



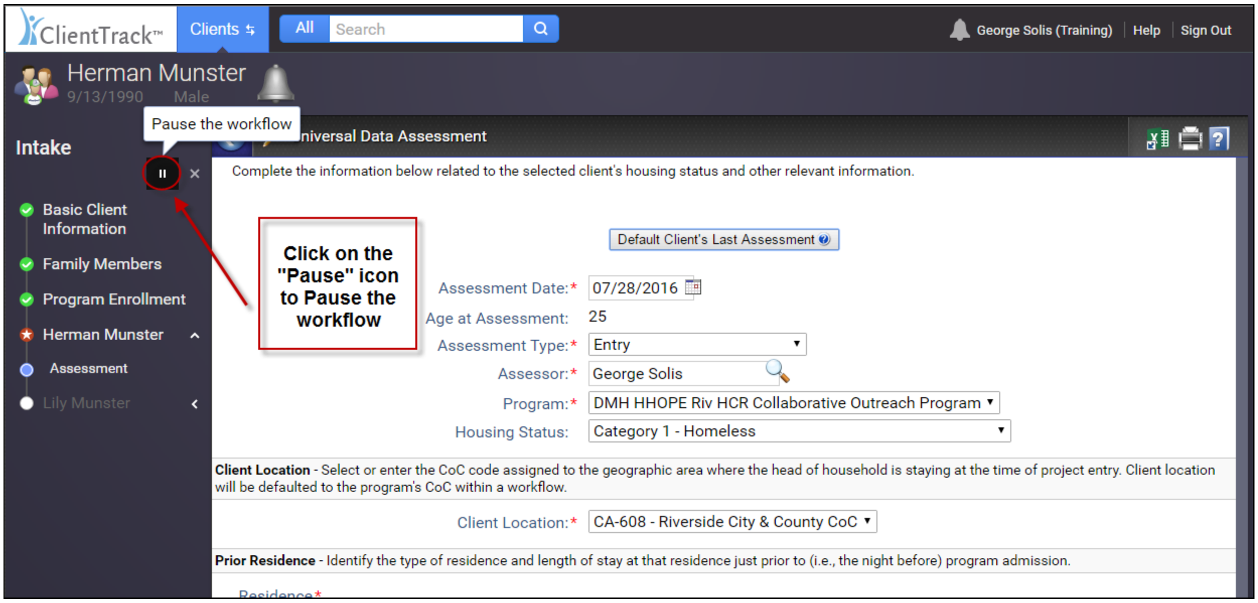
You can navigate backwards to any completed screen; however you cannot navigate forward until the current screen is completed.

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.

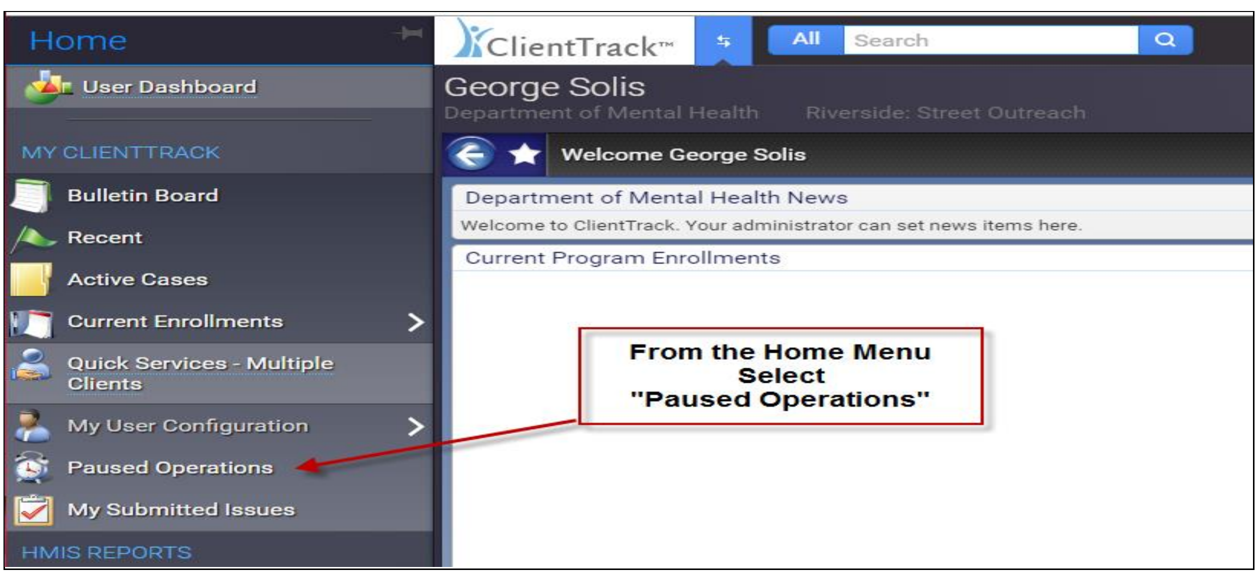
Pause the Workflow

- Click on the “Pause” icon to pause the workflow



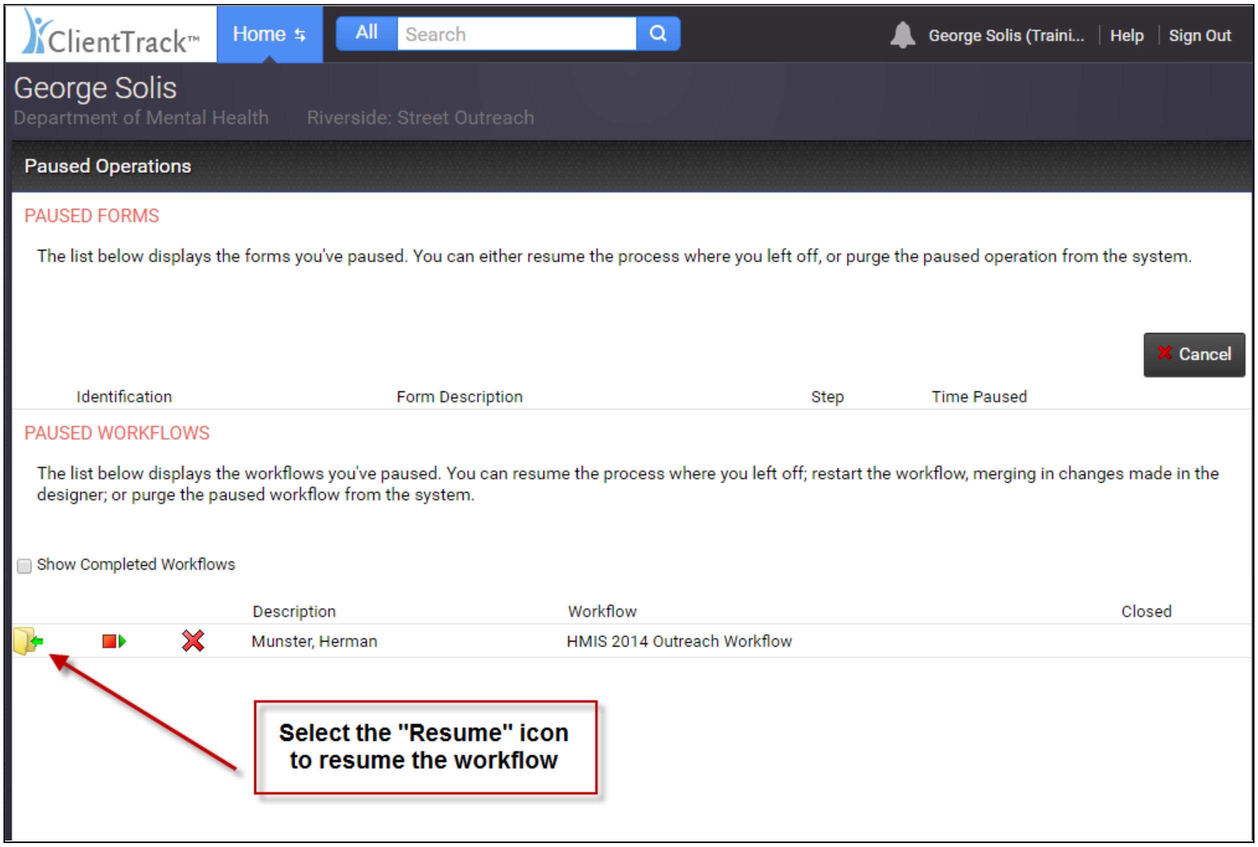
Resume a Workflow

- Select “Paused Operations” from the Home Menu



Paused Operations

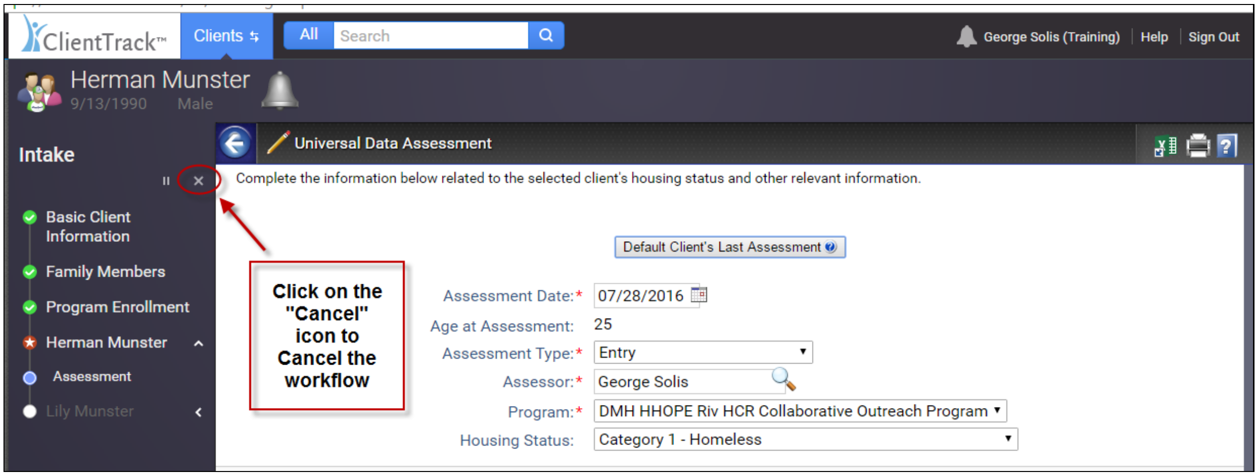
➢ Select the "Resume" icon to resume the workflow



Cancel the Workflow

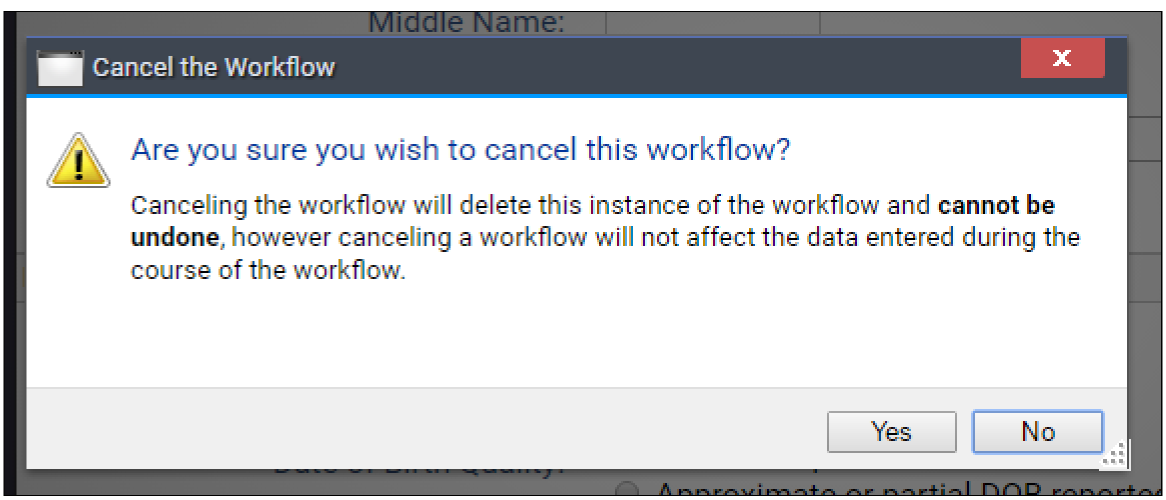
When completing a workflow, you can cancel the workflow process at any point, however cancelling a workflow will not affect the data already entered and saved during the course of the workflow.

➢ 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.

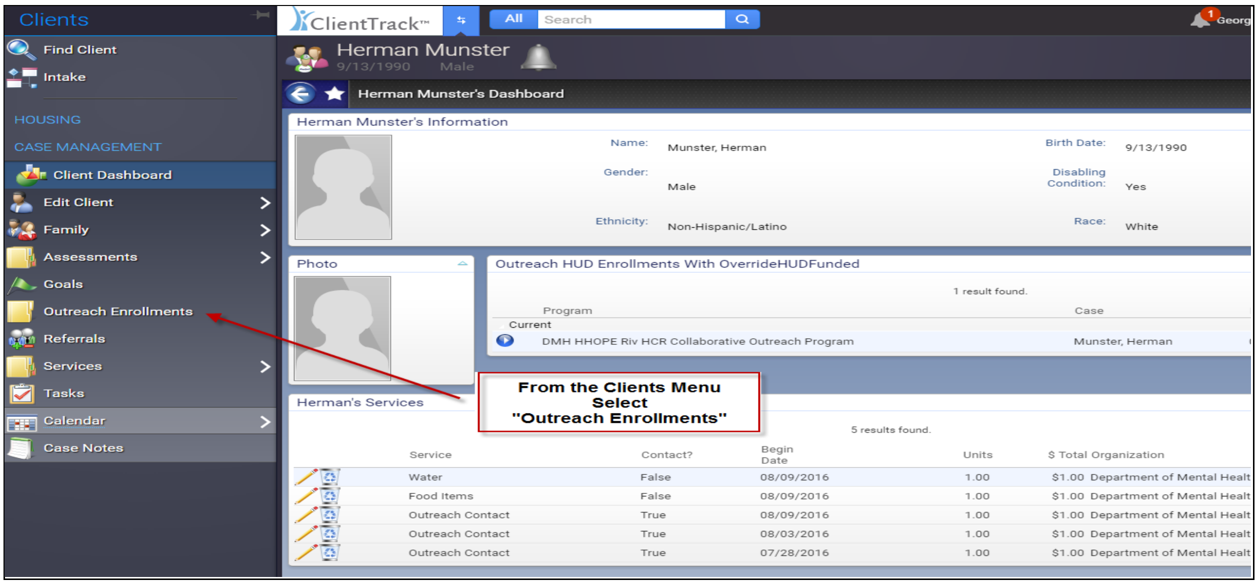
➢ Select "Yes" or "No" to proceed with the cancellation



Exit the Enrollment

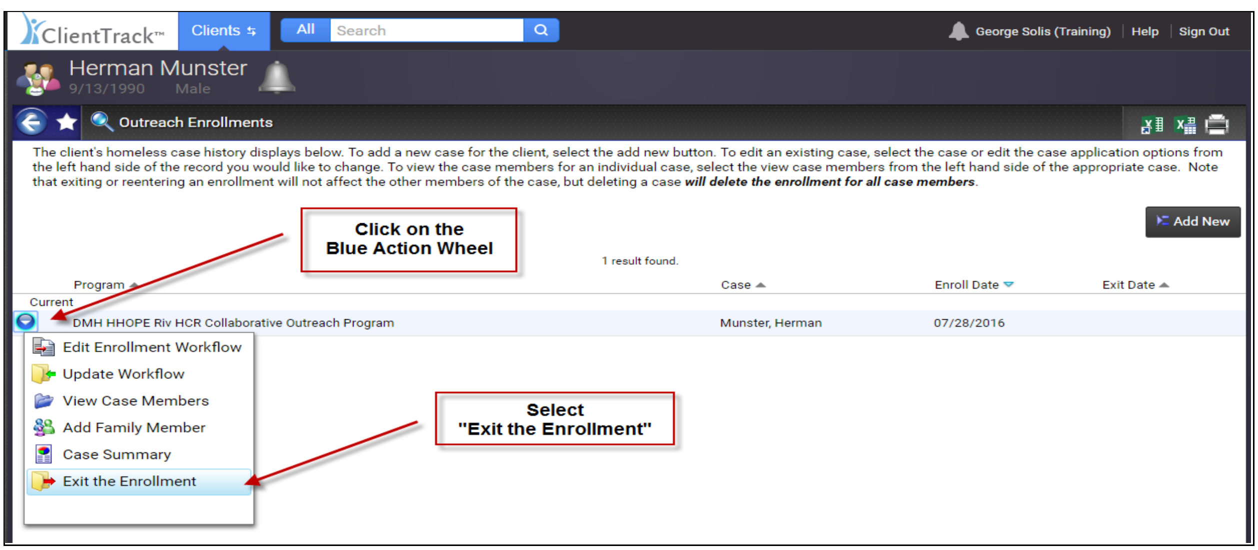
An Enrollment Exit needs to be completed once a client is no longer considered a project participant. It is important to exit clients in a timely manner because this affects the client's Length of Stay. Length of stay is a measurement of the total number of days the client has been enrolled in a program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

- Select "Outreach Enrollments" from the Clients Menu to navigate to the Outreach Enrollments page



Outreach Enrollments

- 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 Exit Date

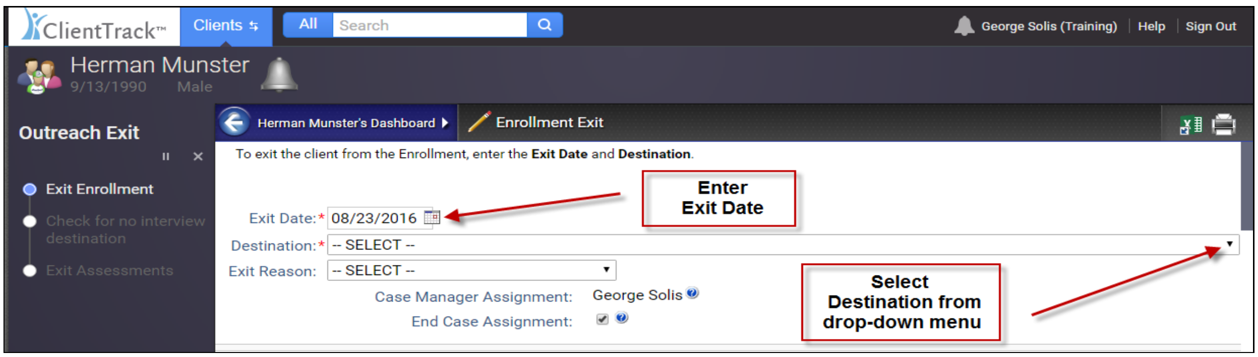
For non-residential projects the exit date may represent the last day a service was provided or the last date of a period of ongoing service. The exit date should coincide with the date the client is no longer considered a project participant.

- Enter Exit Date

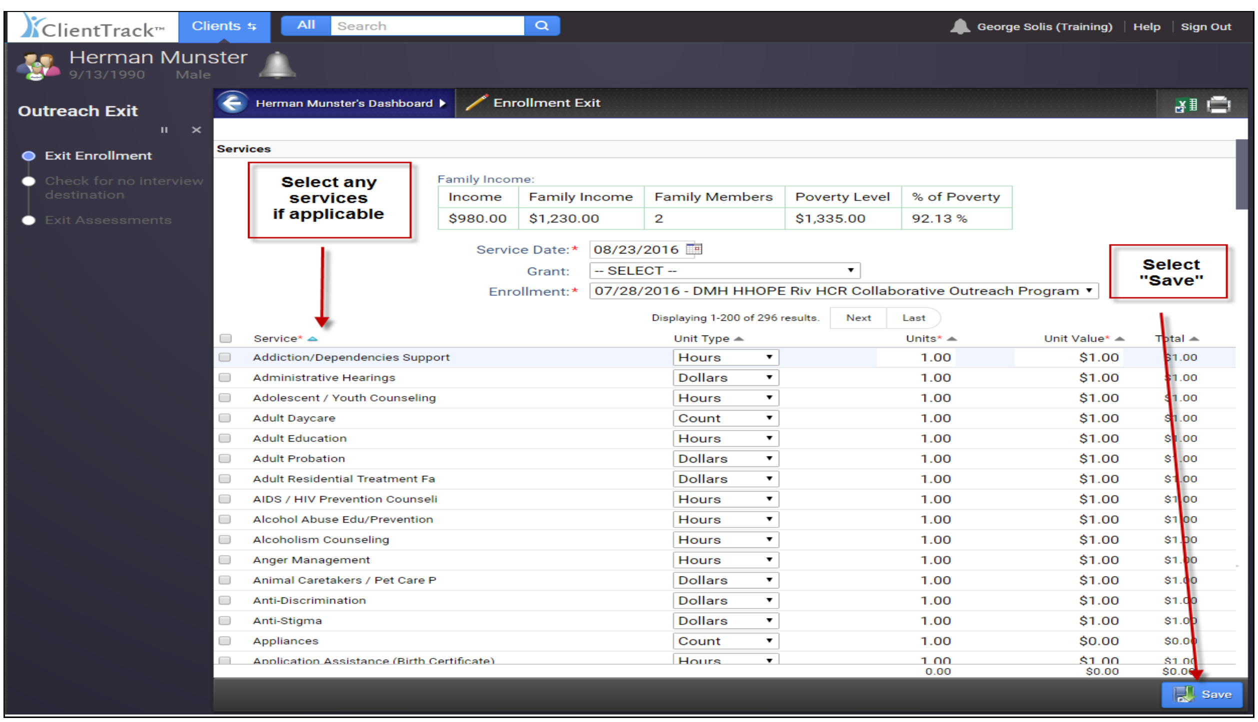
3.12 Destination

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

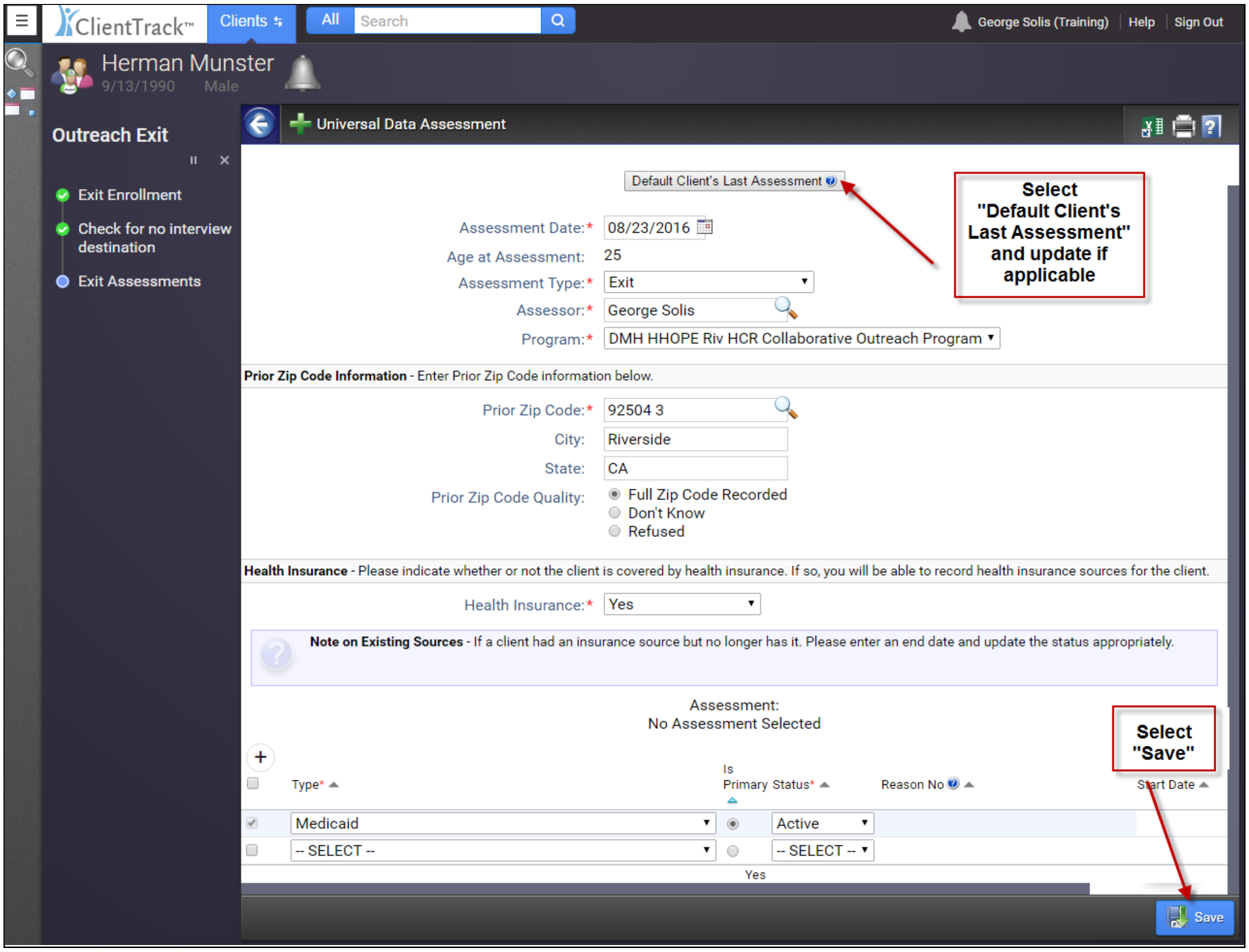


- Select any services if applicable
- Select “Save”



Exit Assessment

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

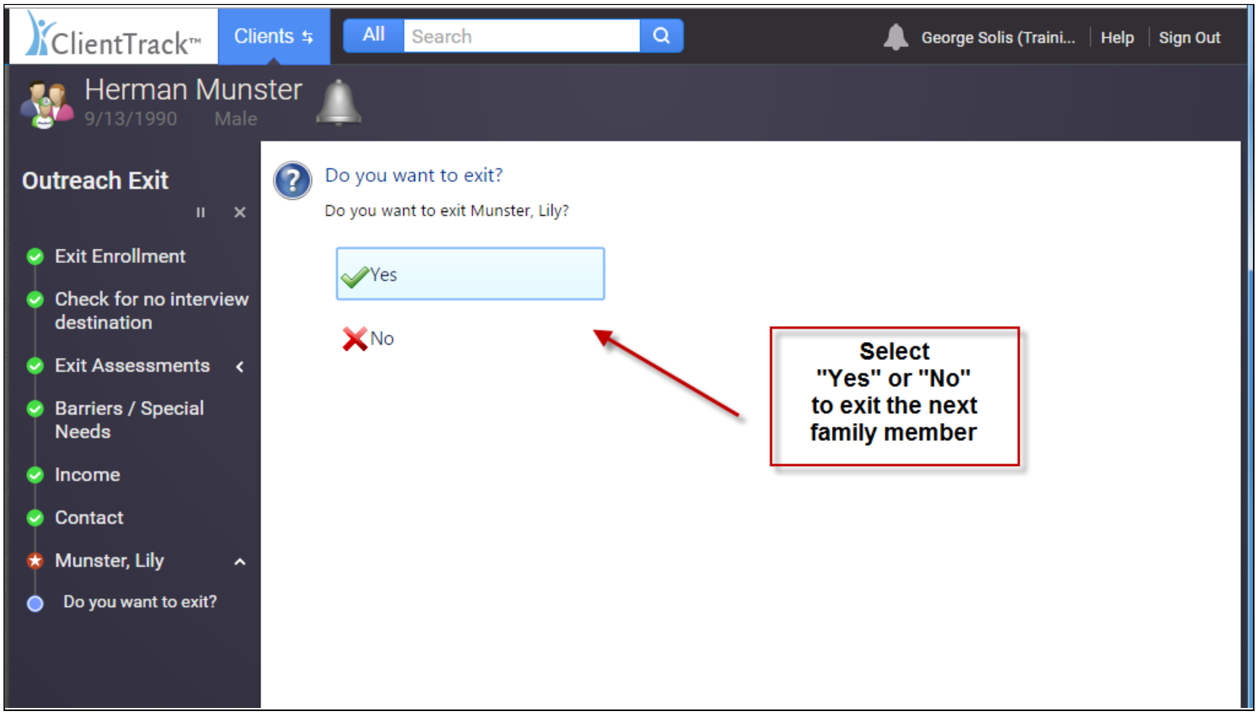


- Complete all steps in the Exit workflow
  - 4.4 Health Insurance
  - 4.10 Substance Abuse – Alcohol/ Drug
  - 4.7 Chronic Health Condition
  - 4.6 Developmental Disability
  - 4.8 HIV/AIDS
  - 4.9 Mental Health Problem
  - 4.5 Physical Disability
  - 4.2 Income and Sources
  - 4.3 Non-Cash Benefits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

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.

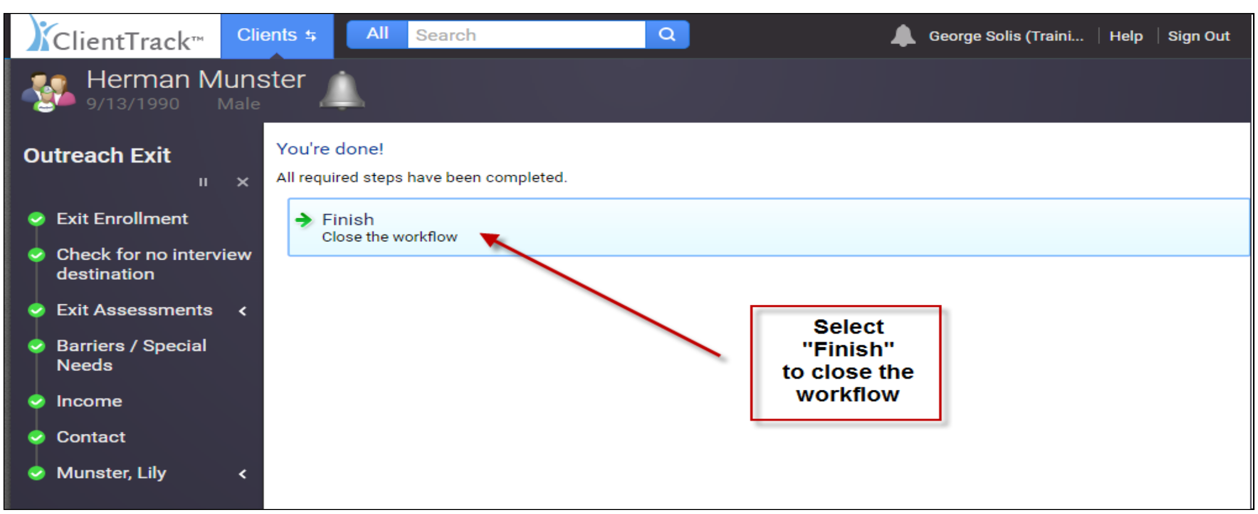
- Select "Yes" or "No" to exit the next family member
- Complete all steps in the exit workflow for all family members



Completion of exit

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

- Select "Finish" to close the workflow

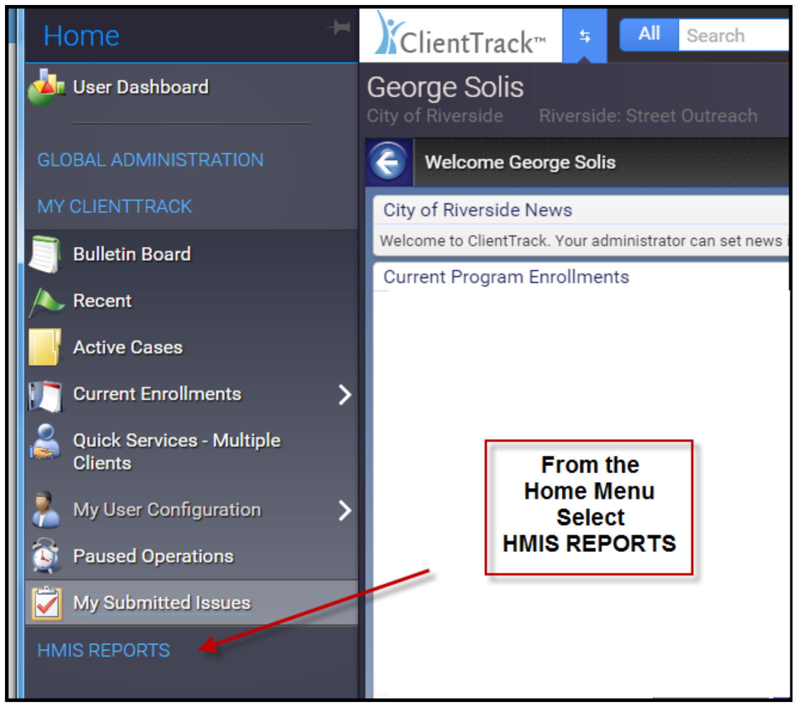


HMIS Reports

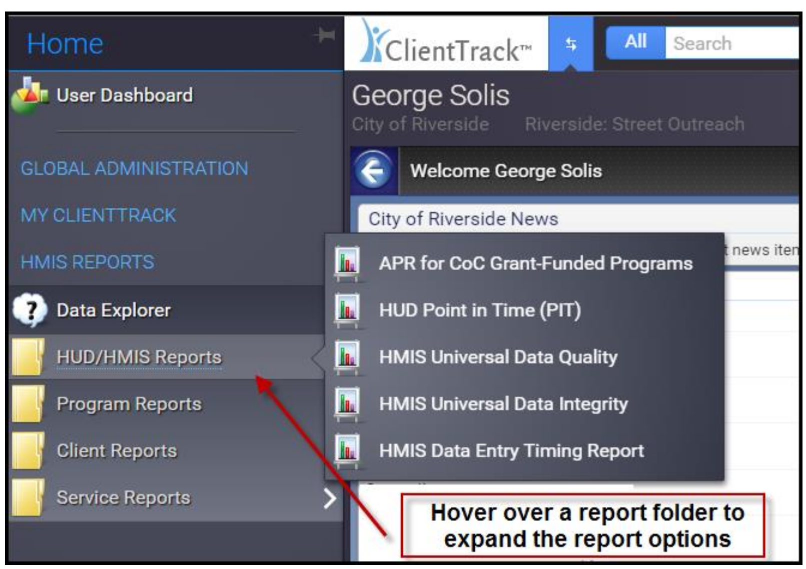
ClientTrack's reporting tools helps you monitor and synthesize the data you collect to stay on top of your operations, evaluate and report on outcomes, and increase funding. Organizations use these reports to measure the effectiveness of programs, submit data to the Continuum of Care and meet Federal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

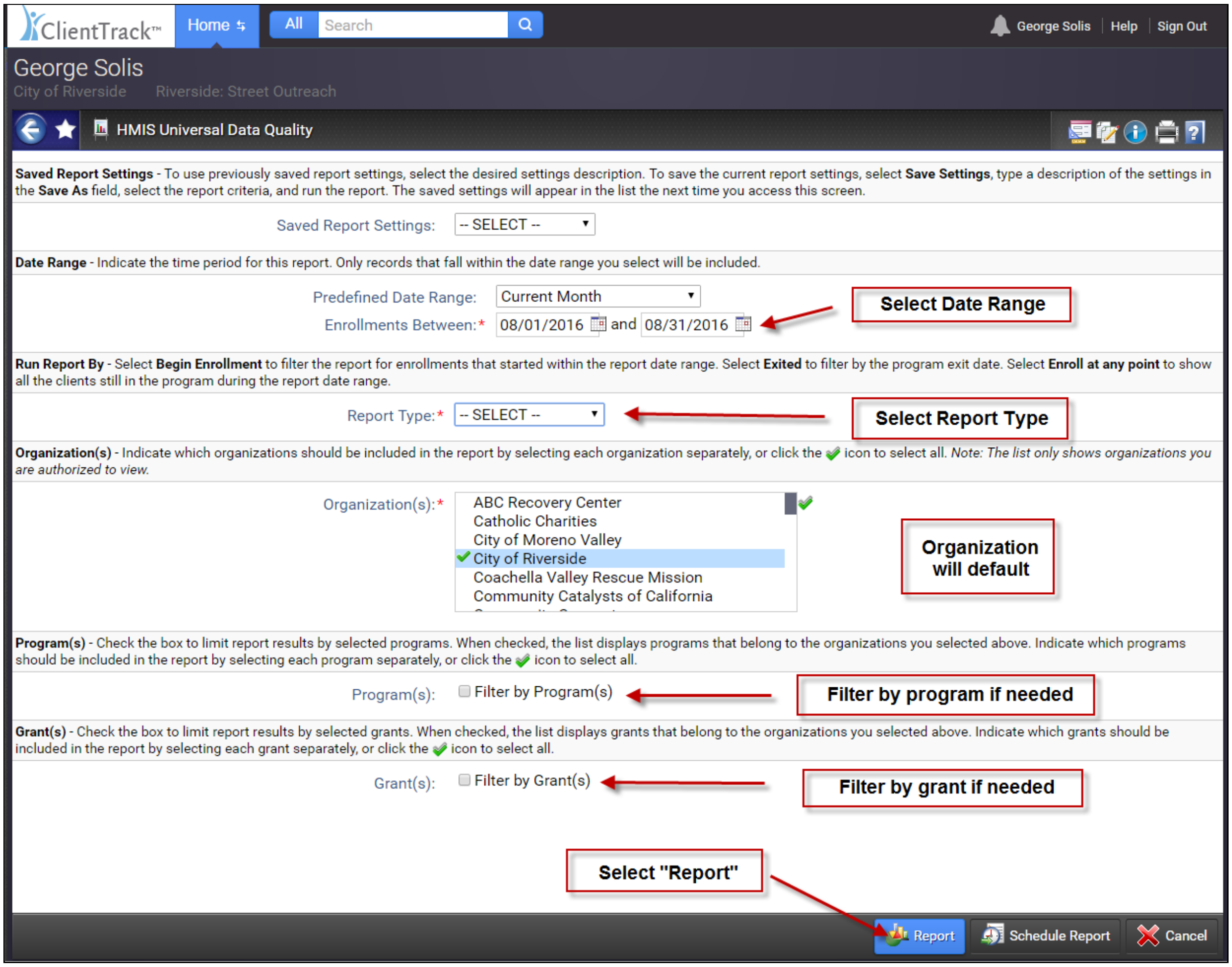


HMIS Universal Data Quality Report

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

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%
⊟ Client doesn't know		1					

Click on the Client's name

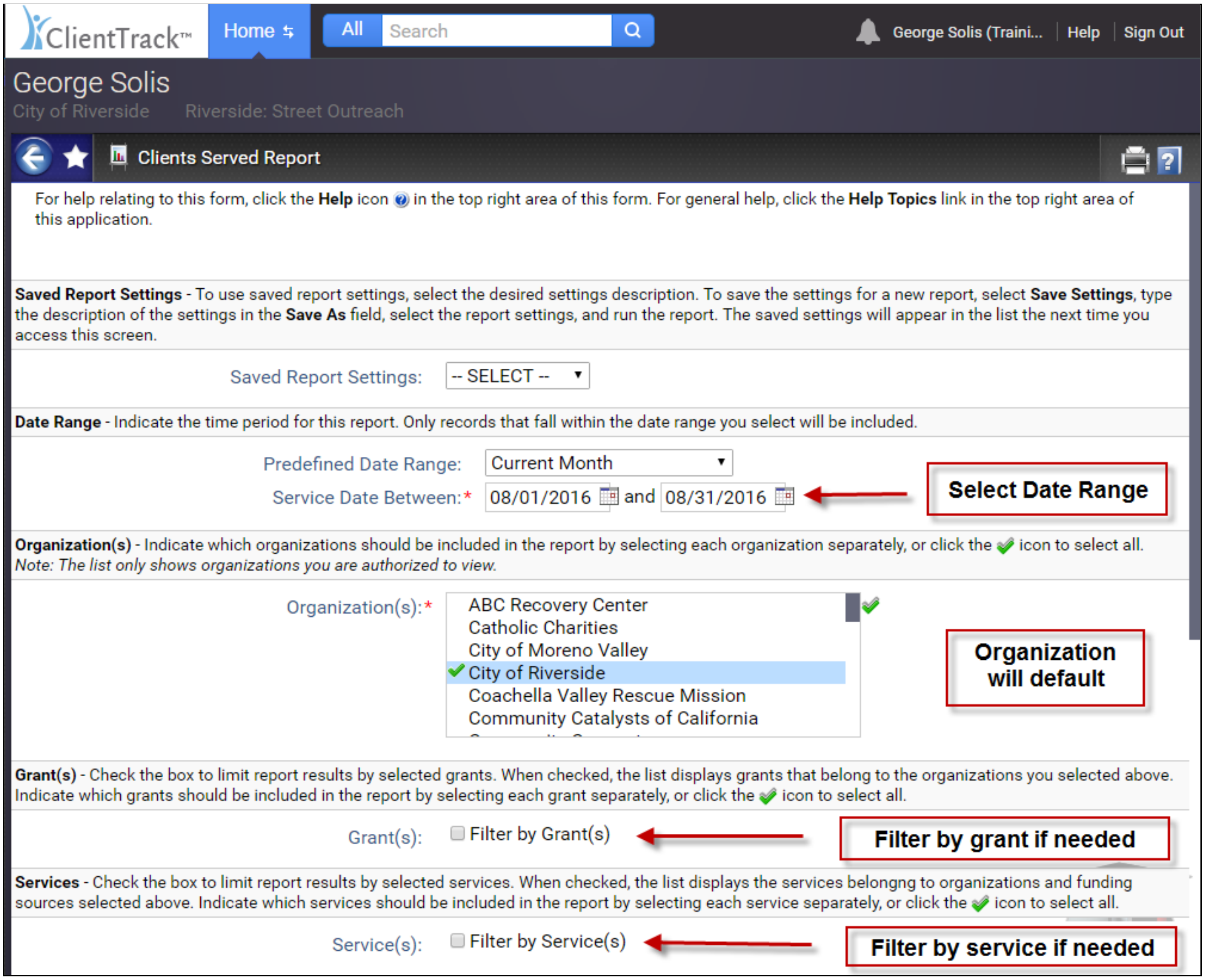
Name	Age	Enroll Date	Exit Date
Client, Test	34	8/17/2016	

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.

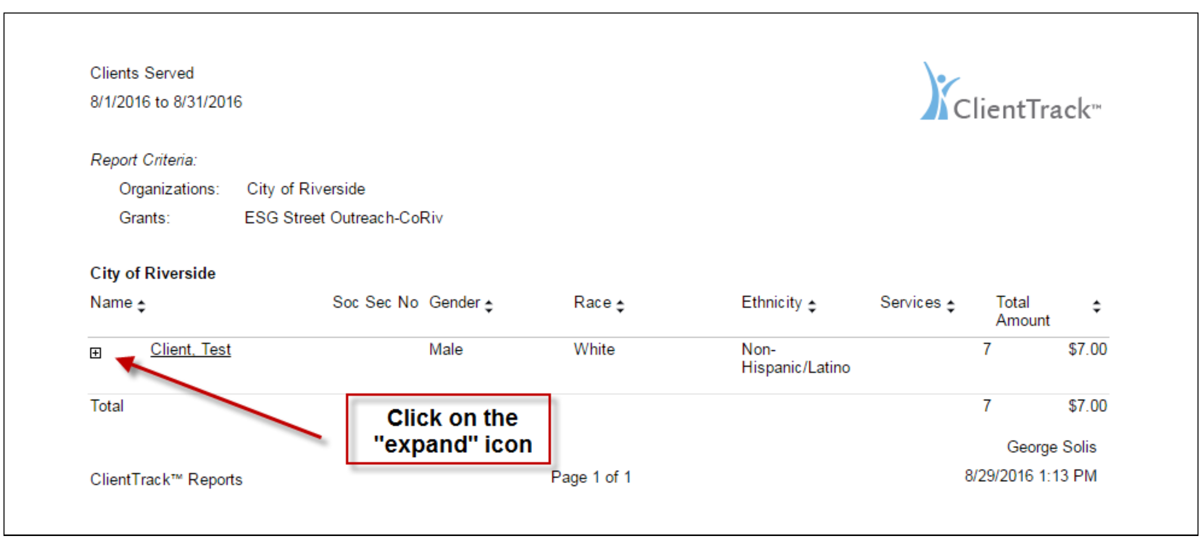
The Clients Served Report is accessed from the Service Reports folder.

- **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



Clients Served
8/1/2016 to 8/31/2016

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
Total						7	$7.00

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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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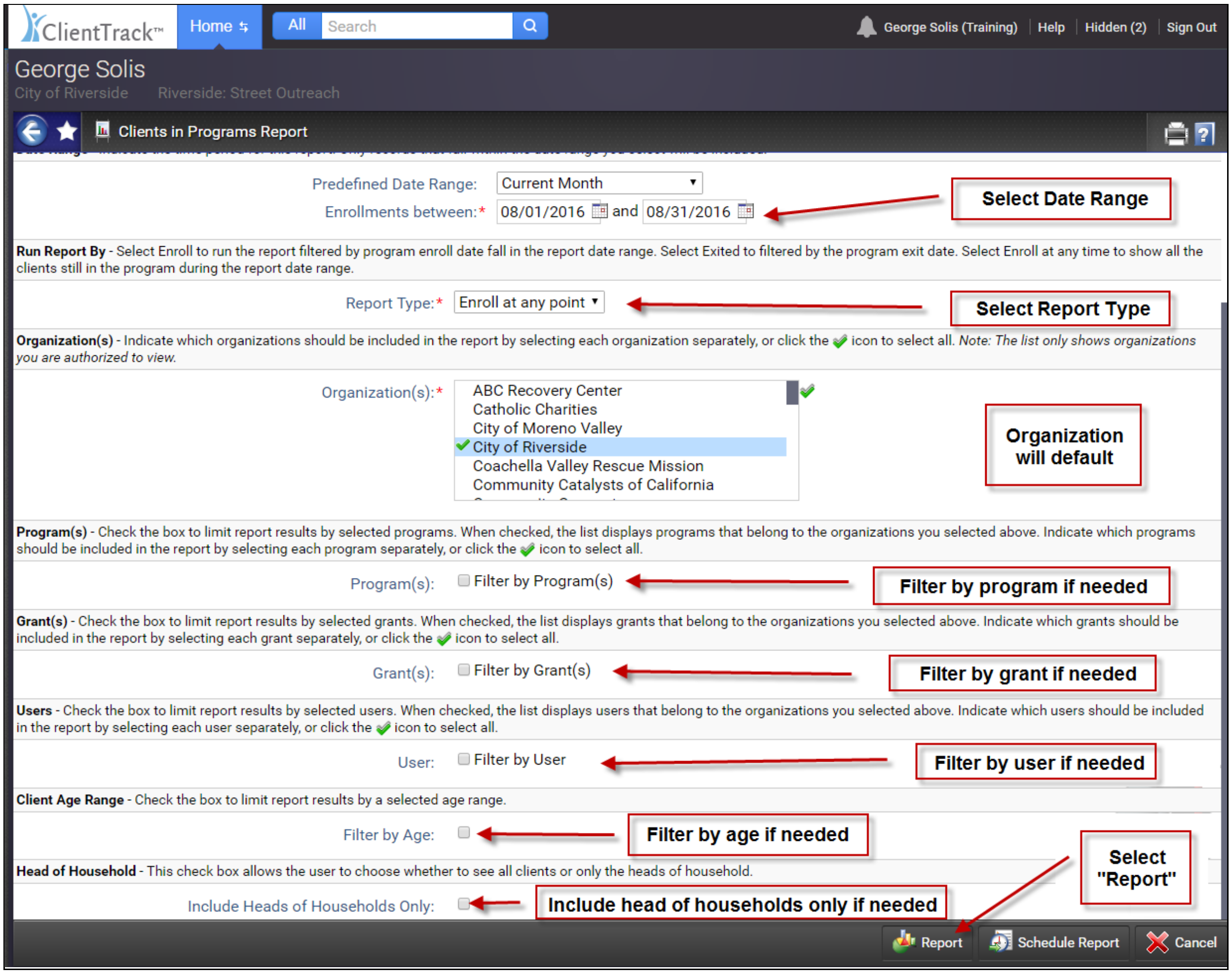
Clients in Programs Report

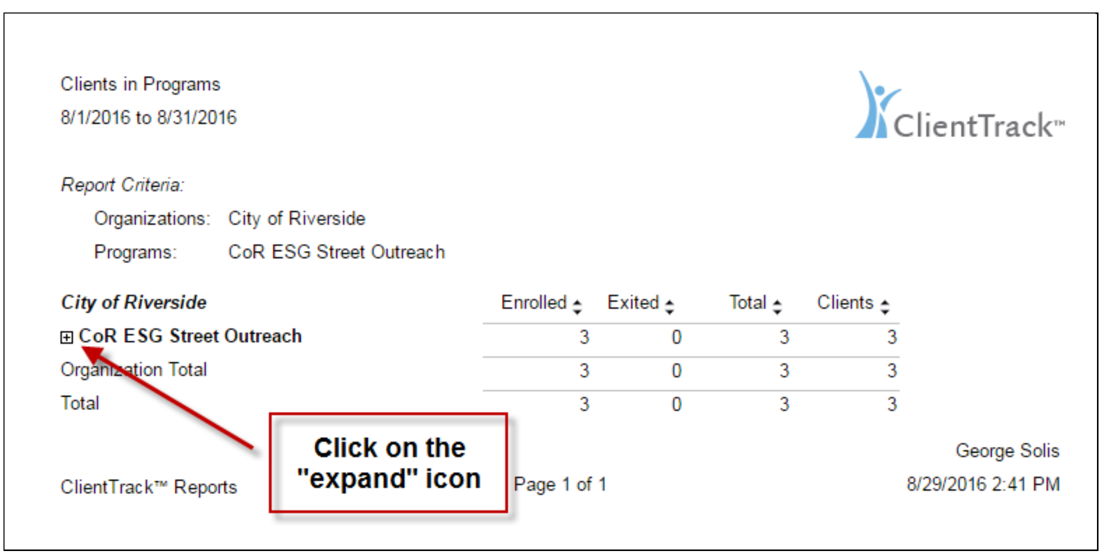
The Clients in Programs report shows the count of clients enrolled by program and allows you to dynamically expand each program to show the client name, SSN, race, gender, enrollment date, exit date and separate totals for those clients still enrolled and those who have an end date. It also displays 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



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

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
Organization Total	3	0	3	3
Total	3	0	3	3

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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	
Organization Total				3	0	3	3	
Total				3	0	3	3	

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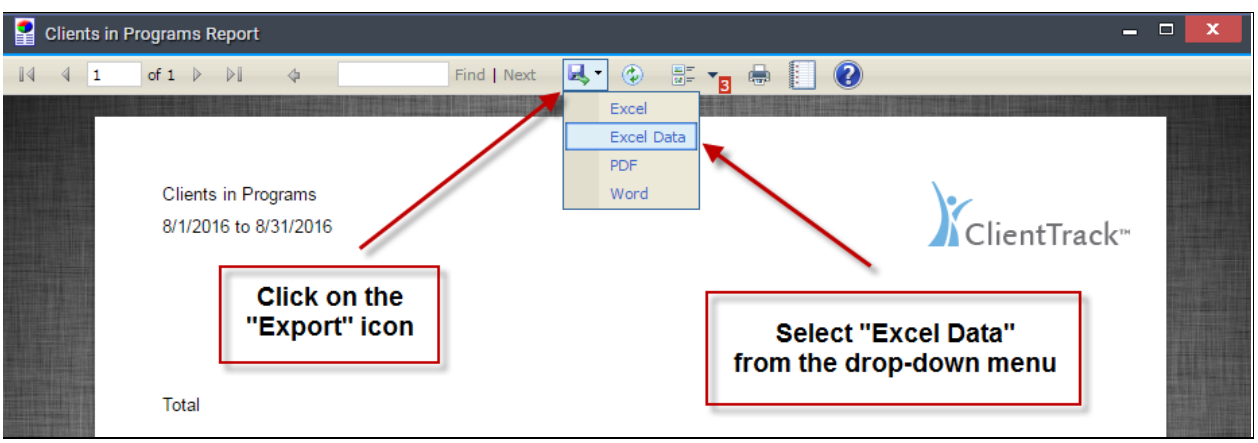
Export as Excel Data

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

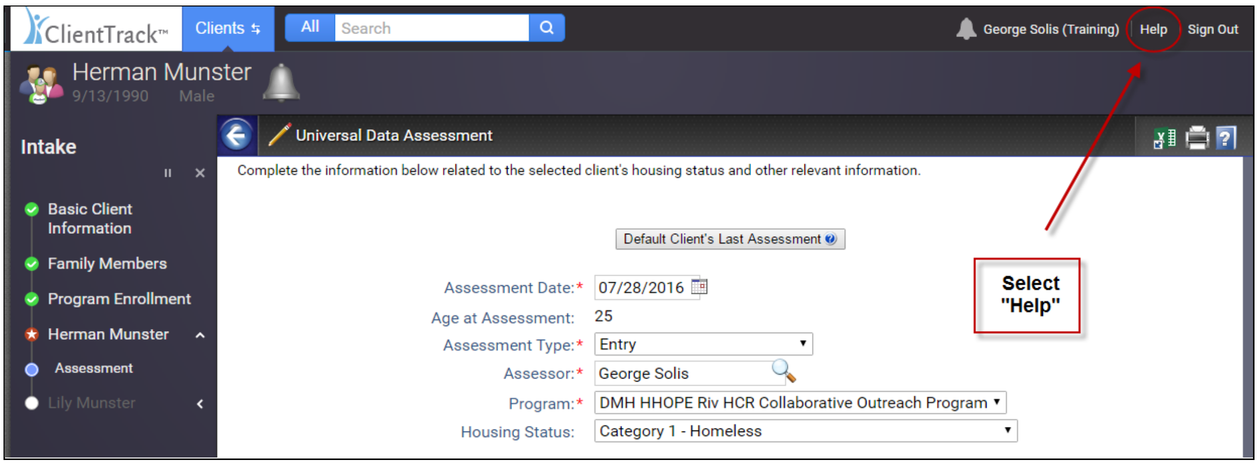


Support Tickets

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.

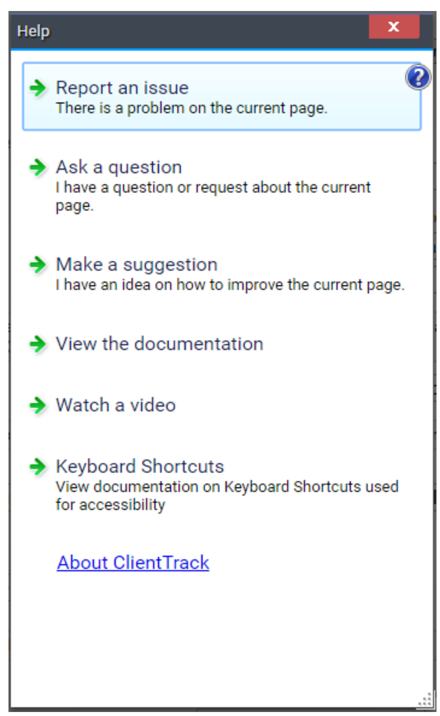
Submitting a Ticket

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.

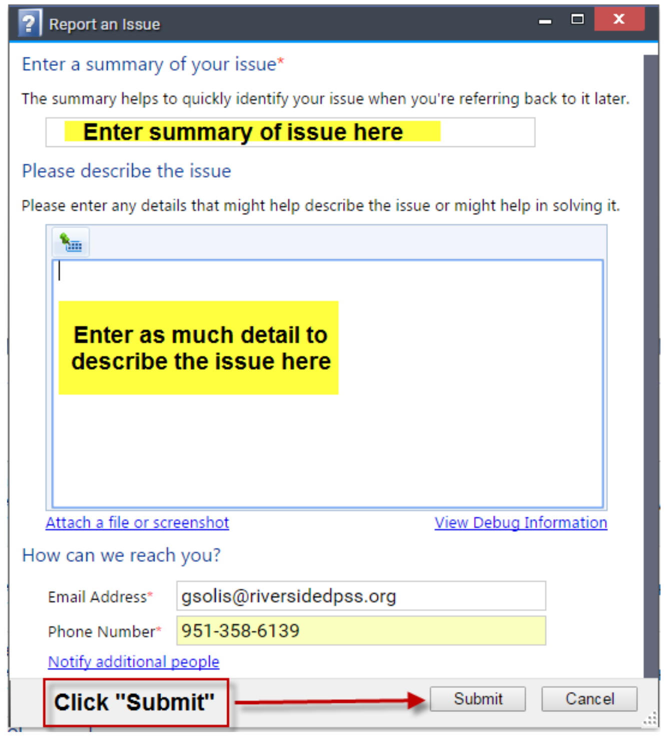


You will be presented with a dialog box designed to guide your request for help.

- 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