

ClientTrack Navigation Guide

Welcome to the New Homeless Management Information System

Overview of ClientTrack Features

CLIENTTRACK ACCESS

You can access HMIS with the following link:

<https://Clienttrack.net/GAHMIS>

LOGGING INTO THE SYSTEM

ClientTrack is a web-based application and you will need to use an internet browser to access it. ClientTrack works with Microsoft Internet Explorer, Google Chrome, *Mobile* Safari and Mozilla's Firefox.

Open your web browser and go to <https://clienttrack.net/gahmis>. Enter your assigned User Name and Password and click “Sign In.” **Remember, sharing your user name and password is not permitted. Passwords are case sensitive and pop-up blockers must be turned off to access the application. You may need to change your settings to allow for pop-ups from this site.**



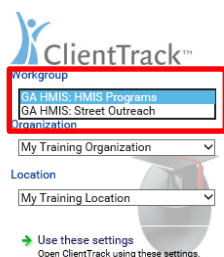
based case management solutions for health and human services, announced today it has completed a machine learning pilot with homelessness data to predict recidivism at the time of intake for individuals experiencing homelessness. For more than 20 years, the ClientTrack Case Management platform has played [...] The post Ecovia Solutions™ Unveils Machine Learning Pilot To Predict Recidivism for Individuals Experiencing Homelessness appeared first on Ecovia Solutions.

ALLURData® Inc. and Ecovia Solutions™ Partner to Offer Outcome-Based Care Coordination for Health and Human Services Whole Person Care
11/21/2016

November 21, 2016 – ALLURData Inc., a leading organization in health information technology, is pleased to partner with Ecovia Solutions to deliver a joint care coordination, health data integration and a health information business intelligence offering. Healthcare providers understand that health care costs are at capacity. Only by addressing the social determinants of health and [...] The post ALLURData® Inc. and Ecovia Solutions™ Partner to Offer Outcome-Based Care Coordination for Health and Human Services Whole Person Care appeared first on Ecovia Solutions.

Alliance National Conference 2016
10/12/2016

Click on “Use These Settings” or “Sign In” to continue. You will be required to “Accept” the Terms of Agreement when you log into the system for the first time.



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Ecovia Solutions is a proud sponsor of Alliance National Conference 2016, October 18-21, 2016 at Loews Hollywood Hotel in Los Angeles.

Users will likely have access to TWO Workgroups. It is **critical** that you select the appropriate Workgroup based on the program for which you will be entering data.

Most Users will choose the GA HMIS: HMIS Programs Workgroup (emergency shelter, transitional housing, rapid re-housing, prevention, services only, etc.)

The GA HMIS: Street Outreach Workgroup should be utilized **ONLY** for street outreach projects, including PATH.

Click on “Use these settings” to get to your User Dashboard.

USER DASHBOARD/HOME WORKSPACE

You will be directed to your **User Dashboard** on the “Home” screen and notified of any important “**HMIS News**” items the Office of Supportive Housing wants to communicate (i.e. upcoming trainings, changes etc.) – this is the first screen you come to after logging in.

1. User Administration

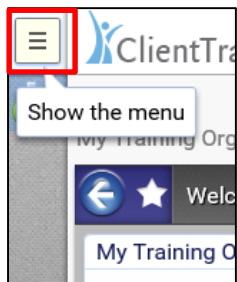
2. HMIS News/Update Information

3. Enrollment by Program

Program	Cases	Clients
My Training Org - HOPWA - Hotel/Motel	1	1
My Training Org - HOPWA - Perm Housing Placement	1	2
My Training Org - HOPWA - STRMU	1	1
My Training Org CoC - PSH	12	18
My Training Org ESG - Shelter	10	11
My Training Org ESG - Street Outreach	16	23
My Training Org RHY - Street Outreach	1	1
My Training Org RHY - Transitional	1	1
My Training Org SSVF - Prevention	2	3
My Training Org SSVF - RRH	9	12

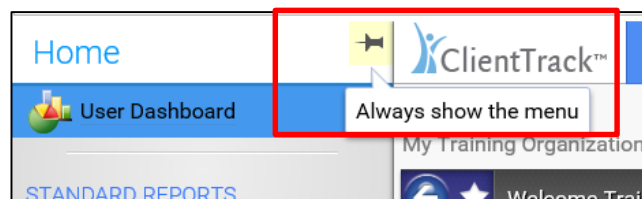
4. Case Manager Assignment

Client Name	Begin Date	End Date	Program
Test, Charl	11/30/2016		My Training Org SSVF - RRH
Test, Charlie	12/15/2016		My Training Org CoC - PSH
Test, Ken	12/13/2016		My Training Org ESG - Street Outreach



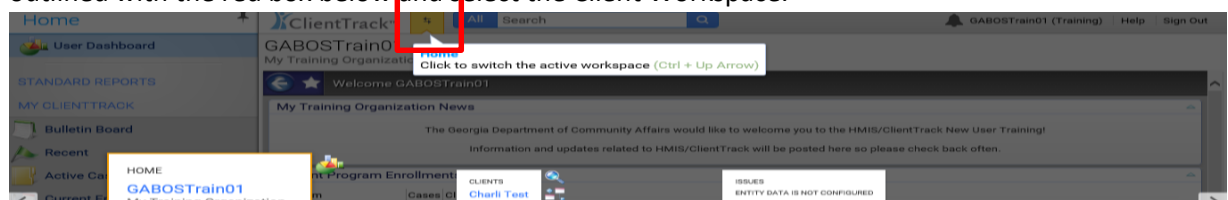
When you first log onto the system, you may want to “Pin” the menu on the left side of the screen. In order to “Pin” the menu, click on the box highlighted in red below.

Once the Menu is visible, click on the push pin to keep the menu visible. This is same process when using the various workspaces.



SELECTING THE CLIENT WORKSPACE

In order to transition to the Client Workspace, click on the link with arrows beside the ClientTrack logo outlined with the red box below and select the Client Workspace.



CASE MANAGEMENT TOOLS

In the “Clients” Workspace, you will find the most recent client record you were on as well as a list of **Case Management Tools** on the left-hand side of the client record. The following information outlines features and tools found on the client record, and to access these features, hover on the link in the case management section and a list of tools will appear as seen in the red box:

The screenshot displays the client dashboard for Charli Test. The interface includes a left-hand navigation menu and a main content area with several sections:

- 1. Basic Client Information and Demographics:** A red box highlights the client's name (Charli Test), birth date (12/6/1969), and Client ID (406179).
- 2. Enrollment Information:** A red box highlights the 'Enrollments' section, which contains a table of enrollment records.
- 3. Case Manager Assignments:** A red box highlights the 'Case Manager Assignments' section, showing the assigned case manager (Michelle Milliken) and the start date (11/30/2016).
- 4. Services:** A red box highlights the 'Services' section, showing a list of services provided to the client.

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
My Training Org SSVF - RRH	1	12/01/2016		My Training Organization	12/01/2016	10635	
My Training Org ESG - Street Outreach	1	11/30/2016		My Training Organization	11/30/2016	10361	
My Training Org Coc - PSH	1	12/06/2016	12/21/2016	My Training Organization	12/06/2016	10595	

Case Manager	Begin Date	Status	End Date	Enrollment
Michelle Milliken	11/30/2016	Active		My Training Org SSVF - RRH

Date	Service	Units	\$ Total Organization
12/01/2016	SSVF - Assistance Obtaining VA Benefits - VOCREHAB	1.00	\$0.00 My Training Organization

The Client ID can be found in the header on the Client Dashboard. Please use the Client ID when submitting an issue to the HMIS Support Staff. Do NOT send a client name, date of birth and/or social security number.

FINDING A CLIENT IN THE SYSTEM

Before entering a client into the system as a new client, **you should ALWAYS conduct a search for the client** to see if there is an existing client record in the system. To search for a client, go to the “Clients” screen as seen below and click on “Find Client” in the upper left-hand corner of the screen as also outlined in red below.

It is imperative you do not enter a duplicate client record into the system in order to ensure the accuracy and overall quality of the data. To speed the search process and reduce the chance for input error, input as few characters as possible in the criteria fields.

The screenshot shows the 'Find Client' search interface. The 'Find Client' button in the top left is highlighted with a red box. The search criteria fields are as follows:

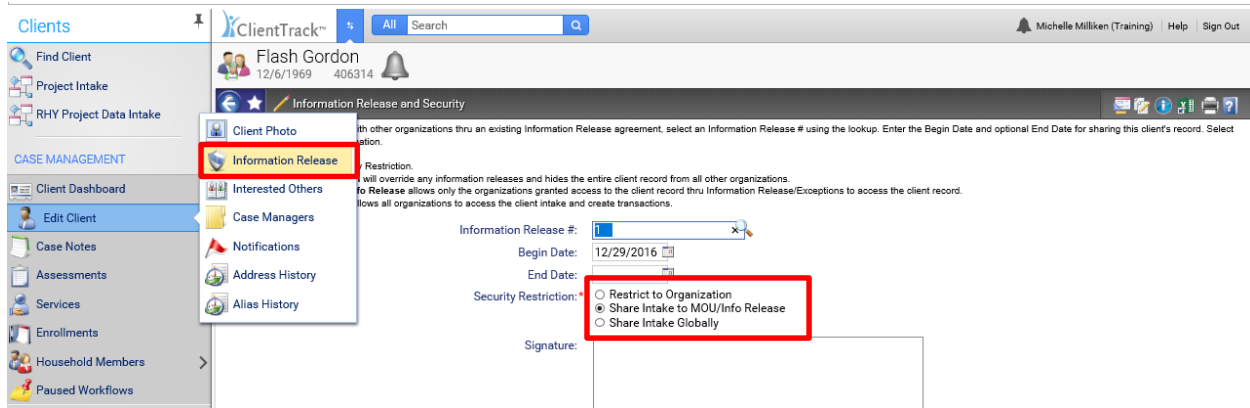
- First Name: won
- Last Name: wom
- Middle Name: (empty)
- Full Name (Last, First): (empty)
- Social Security Number: (empty)
- Birth Date: (empty)
- Scan Client ID: (empty)

A 'Search' button is located at the bottom right. Below the search criteria, a table shows the search results:

First Name	Last Name	Middle Name	SSN	Birth Date
Wonder	Woman		XXX-XX-6789	01/02/1985

CLIENT INFORMATION SHARING AND INFORMATION RELEASE PROCEDURE

Data Sharing Information - In order to see and share transaction information on a client with other organizations AND the client has signed a consent form to share information, you will need to change the Information Release in the system. You will go to the Client Dashboard and hover over the Edit Client menu option. Select the Information Release from the sub-menu.



All client records imported from the previous HMIS will have a Security Restriction of “Share Intake Globally” which means all organizations will have access to a Client Record but not transaction data such as enrollment or services information. If the client signs a consent to share information, you can change the Security Restriction to “Share Intake to MOU/Info Release”. **You will need to add a "1" in the Information Release # field.** Changing the Security Restriction will allow you to see transaction information from other organizations. Enrollment and service transaction data for “Protected Agencies” will be restricted by ClientTrack and remain restricted regardless of the Security Restriction.

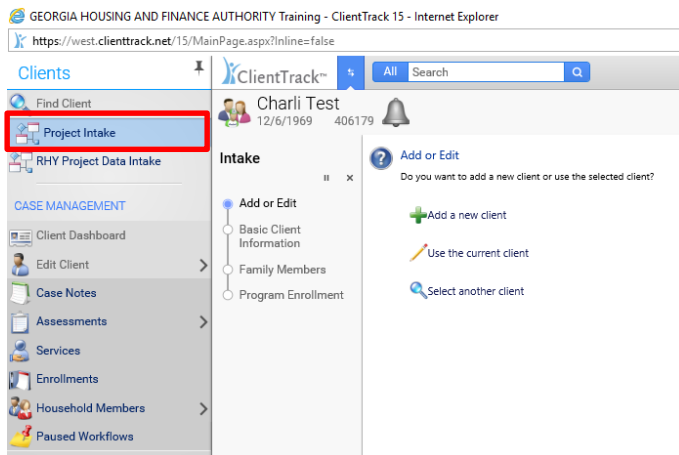
Barrier (special needs) information and Case Notes are not shared between organizations regardless of the Security Restriction.

Please **DO NOT use the Restrict to Organization** as the Security Restriction. If you use this option, the Client Record will NOT be visible by other organizations and they will not be able to search or access the Client Record.

ADDING A NEW CLIENT WITH PROGRAM ENROLLMENT

ClientTrack utilizes a specific workflow to step you through the process of completing all required assessments at entry and discharge. The workflow is easy to use and it automatically prompts you for the required information based on the workflow and program you choose.

After conducting a search for the client in the system to ensure an existing client record does not already exist, you can add a new client record by selecting **“Project Entry”** in the upper left-hand corner of the screen found under **“Find Client.”** Then choose **“Add New Client”** when prompted as seen above.

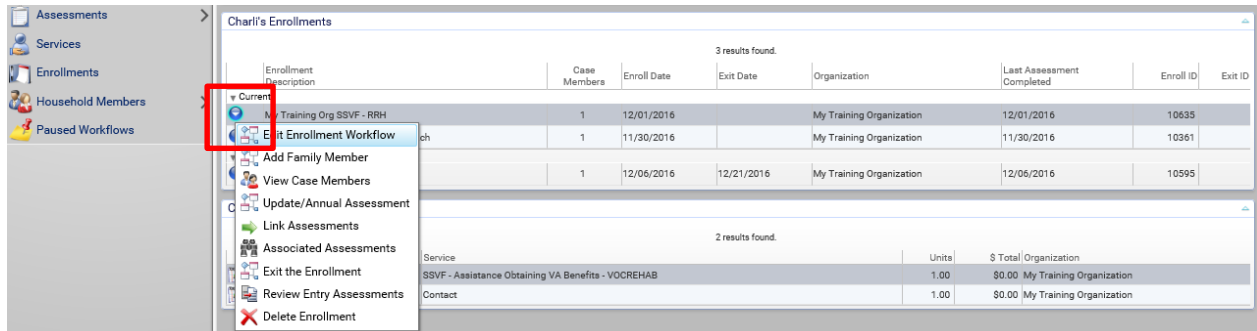


UPDATE/ANNUAL ASSESSMENT

For clients who spend longer periods of time in your program or to document any changes in your client’s status since entry, you should complete an **“Update/Annual Assessment”**. This assessment is required if clients are enrolled in your program for a year or longer, and some programs like RRH require more frequent assessments so be sure to check your program requirements for the Update/Annual Assessment.

The Update/Annual Assessment is also helpful for tracking significant changes to a household – for example a client gets a job and the income changes. For your convenience, the assessment has been developed as a workflow with the following steps:

- Click on the blue play button beside your program enrollment;
- Select **“Update/Annual Assessment”** from the drop down list; and
- Complete the required assessments prompted by the workflow and save as you go.



PROGRAM DISCHARGE/EXIT

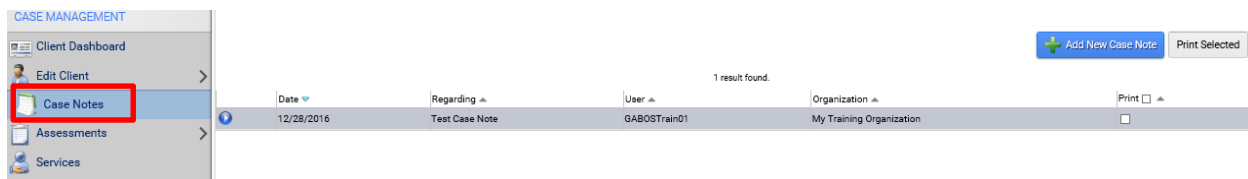
When a client has transitioned from your project or is no longer receiving services for any reason, you will discharge/exit the client from your program in ClientTrack with the following steps:

- Go to the client record;
- Click on the blue play button beside your project enrollment located in the center of the client record;
- Select “Exit the Enrollment” in the drop down list that appears after clicking on the blue play button; and
- Complete the required assessments prompted by the workflow and save as you go.

CASE NOTES AND SERVICE PLANS

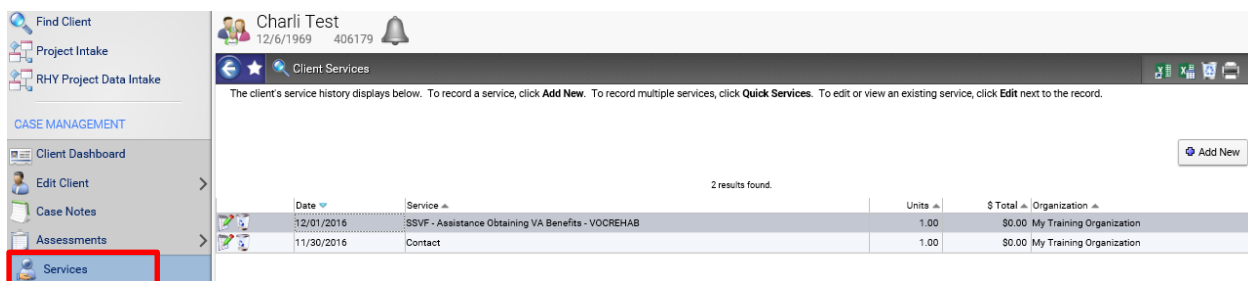
Timely and robust case notes assist you and other case managers at your organization in serving your clients. It is extremely important that meetings, calls and other relevant information regarding your client are properly documented in case notes. Your program may be required to keep case notes/service plans but as of February 2016, they are not required to be entered into ClientTrack.

To add case notes, click on the “Case Notes” link in the list of case management tools on the left-hand side of the screen. Click on the “Add New” button on the upper right-hand side of the screen. **Any case notes created for a client are restricted to case managers within your organization. No one outside of your agency can view your case notes.**



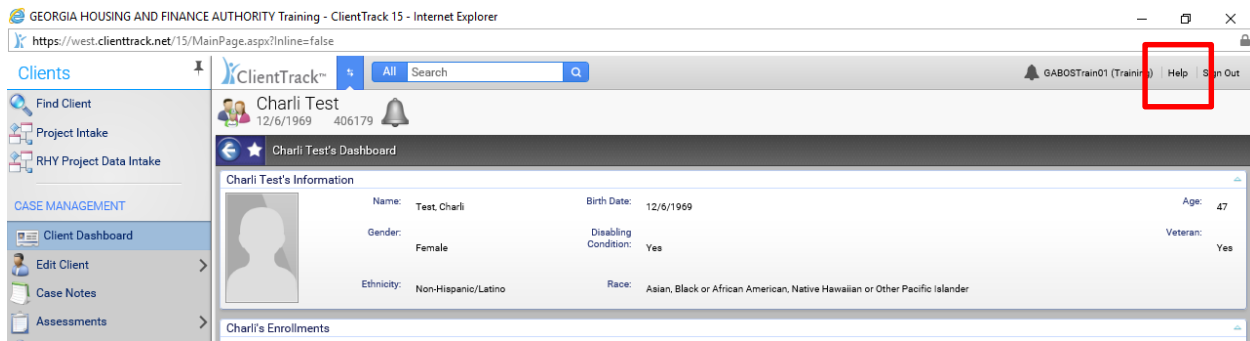
ADDING SERVICES

Currently, HOPWA, RRH, RHY and PATH programs are required to enter services into the HMIS. If you operate a HOPWA, RRH, RHY or PATH program, after completing an enrollment for a client, you can document services associated with the program enrollment with the “Services” link located in the list of case management tools on the left-hand side of the client record. This will open the Services window where you can “Add New” services or manage current services.

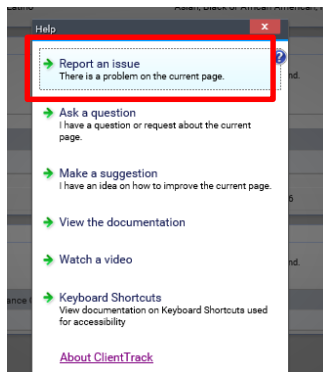


SUBMITTING AN ISSUE OR REQUEST ASSISTANCE

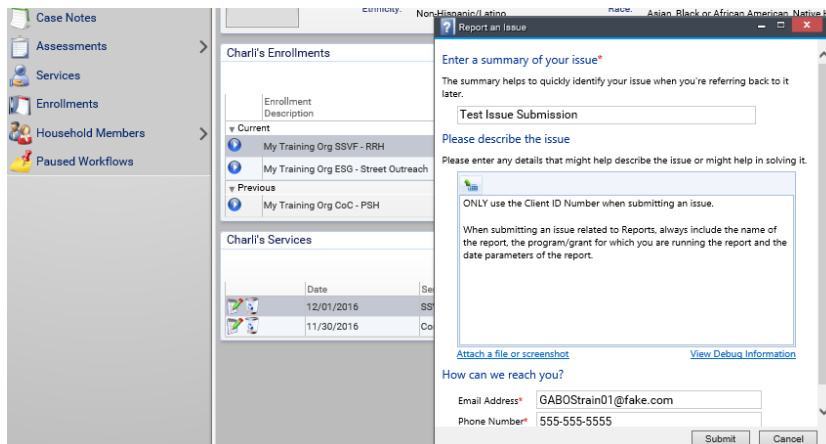
If you need assistance logging into the HMIS, please email the HMIS Support Staff at GAHMISsupport@dca.ga.gov. If you need assistance after logging into the HMIS, please follow the steps listed below. Click on the “Help” link in the upper right corner of the screen.



Select the “Report an Issue” option from the menu.



Enter a Subject/Summary and then add the specifics of your reason for contacting the HMIS Support Staff in the body of the issue statement. Please be very specific when you submit an issue to limit the number of times HMIS Support Staff need to reach out for clarification. Do NOT send client names, dates of birth or social security numbers via email or to the HMIS Support Staff. Identify clients using their unique Client ID number located in the header of the Client Dashboard.



You will receive an email that the issue has been submitted, when the issue is assigned and when the issue is resolved. You can also review the tickets you submit and add additional comments by going to the Issues Workspace.

