ClientTrack Navigation Guide

Welcome to the New Homeless Management Information System

Overview of ClientTrack Features

CLIENTTRACK ACCESS

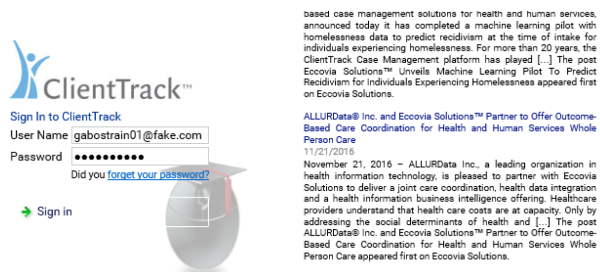
You can access HMIS with the following link:

https://Clienttrack.net/GAHMIS

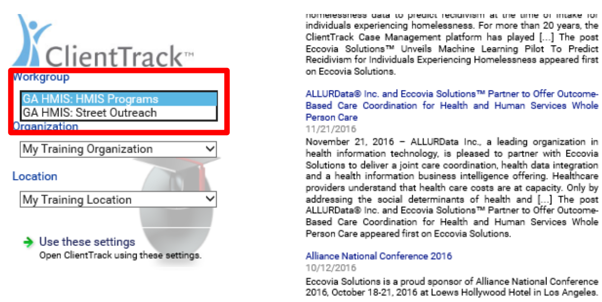
LOGGING INTO THE SYSTEM

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.**



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.



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.

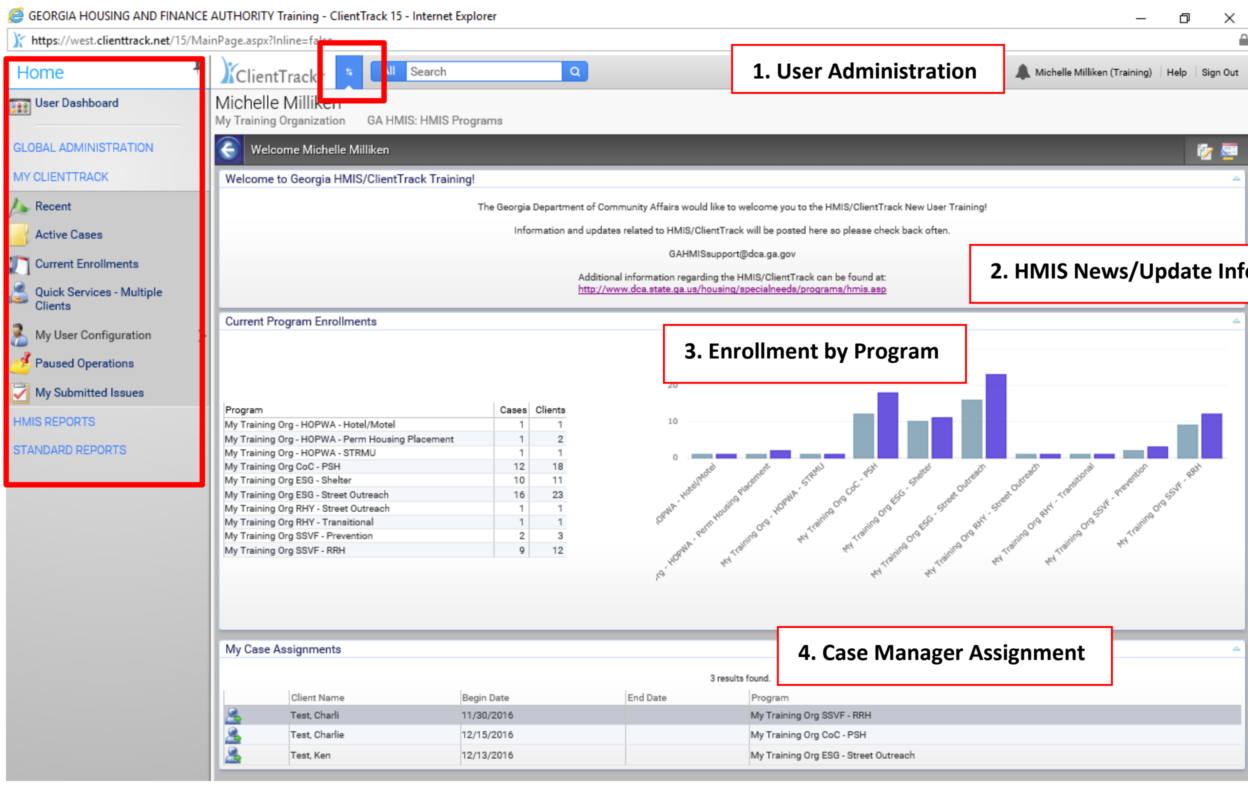
Most Users will choose the GA HMIS: HMIS Programs Workgroup (emergency shelter, transitional housing, rapid re-housing, prevention, services only, etc.)

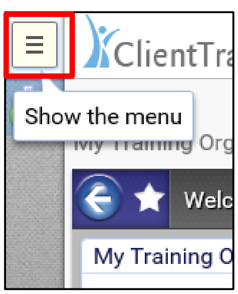
The GA HMIS: Street Outreach Workgroup should be utilized ***ONLY*** for street outreach projects, including PATH.

Click on "Use these settings" to get to your User Dashboard.

USER DASHBOARD/HOME WORKSPACE

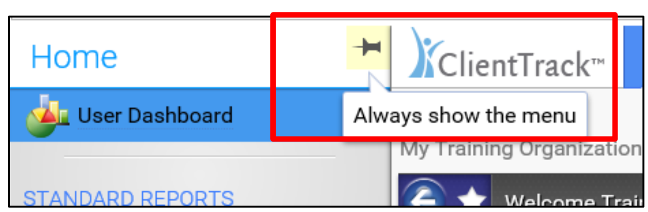
You will be directed to your **User Dashboard** on the **"Home"** screen and notified of any important **"HMIS News"** items the Office of Supportive Housing wants to communicate (i.e. upcoming trainings, changes etc.) – this is the first screen you come to after logging in.





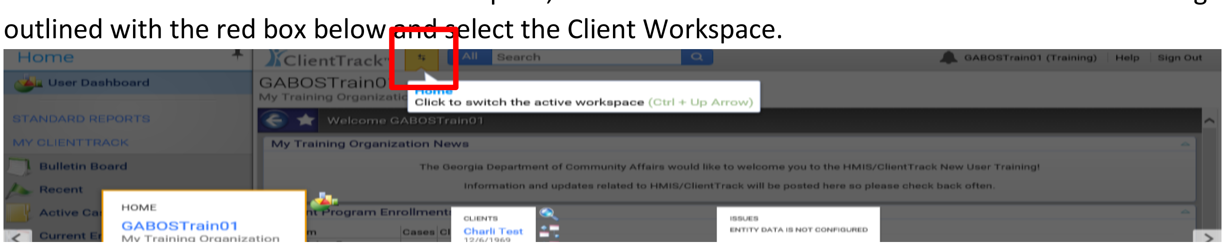
When you first log onto the system, you may want to "Pin" the menu on the left side of the screen. In order to "Pin" the menu, click on the box highlighted in red below.

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



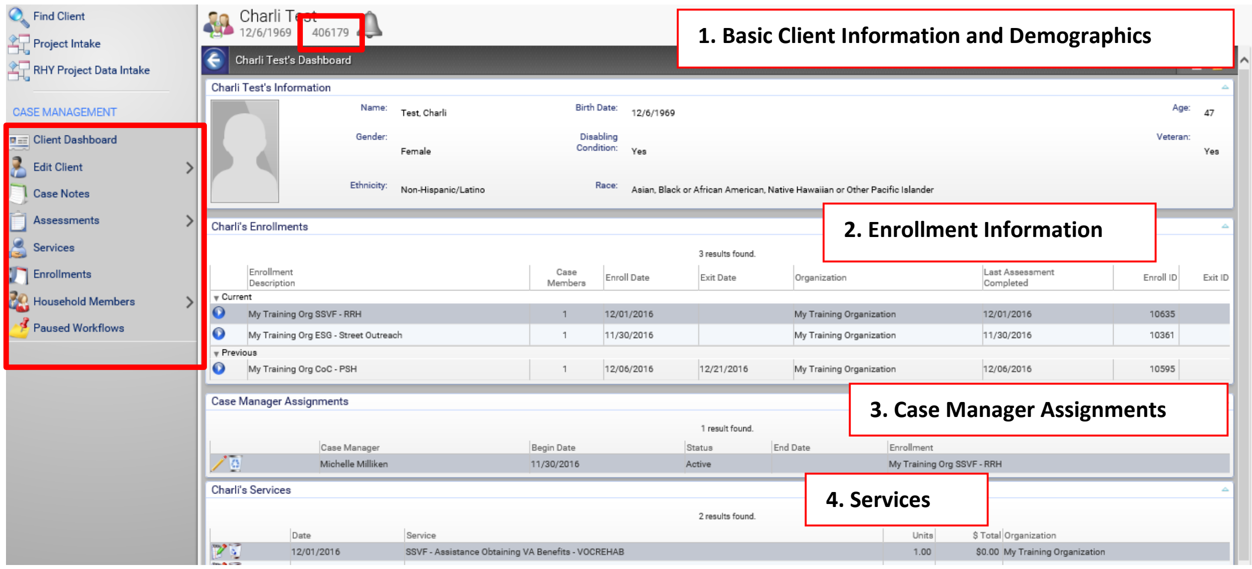
SELECTING THE CLIENT WORKSPACE

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:

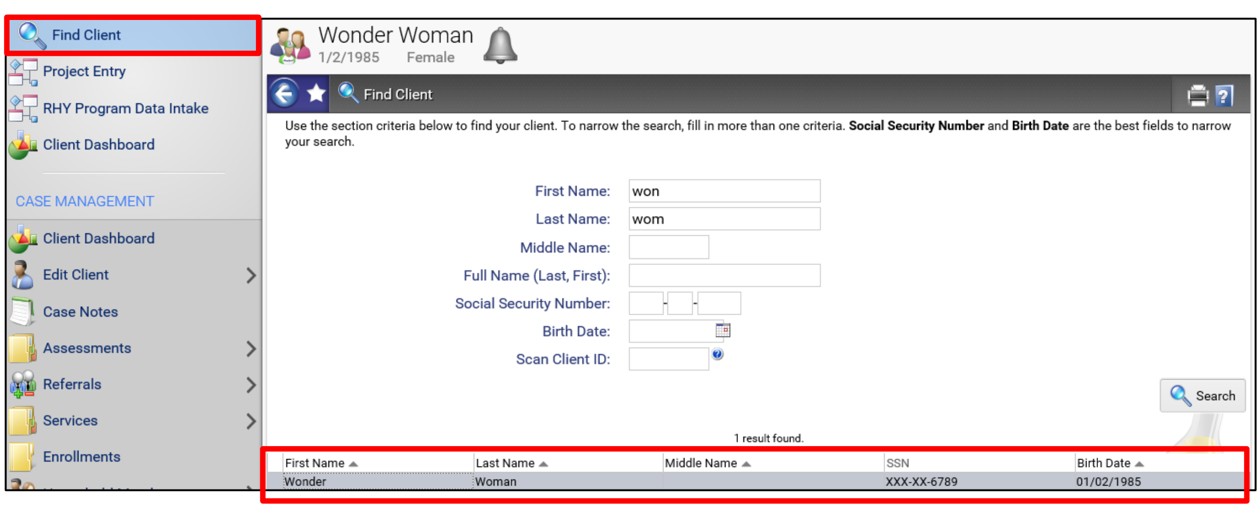


The Client ID can be found in the header on the Client Dashboard. Please use the Client ID when submitting an issue to the HMIS Support Staff. Do NOT send a client name, date of birth and/or social security number.

FINDING A CLIENT IN THE SYSTEM

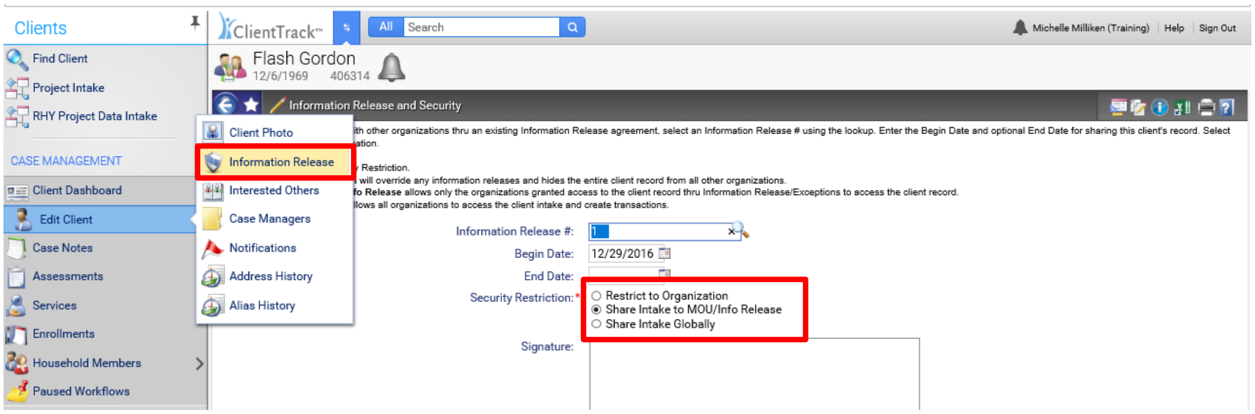
Before entering a client into the system as a new client, **you should ALWAYS conduct a search for the client** to see if there is an existing client record in the system. To search for a client, go to the **"Clients"** screen as seen below and click on **"Find Client"** in the upper left-hand corner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



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.

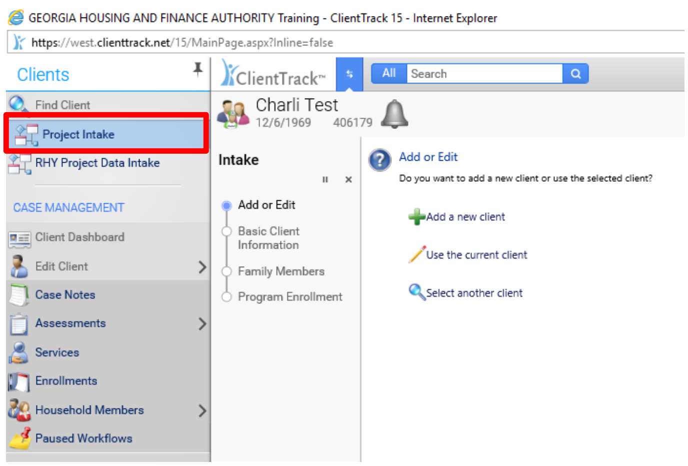
Barrier (special needs) information and Case Notes are not shared between organizations regardless of the Security Restriction.

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.

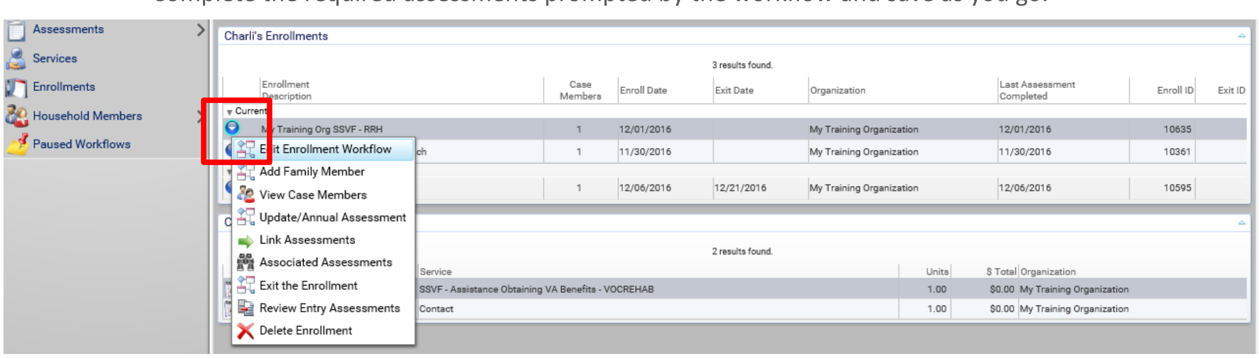


UPDATE/ANNUAL ASSESSMENT

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.

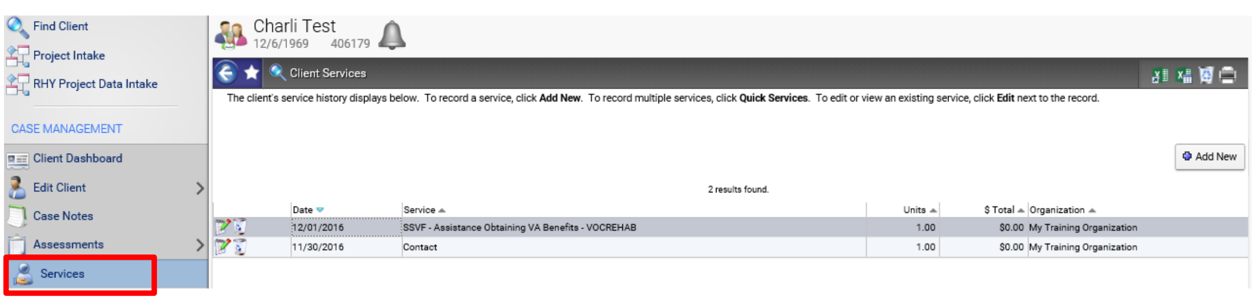
CASE NOTES AND SERVICE PLANS

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.***

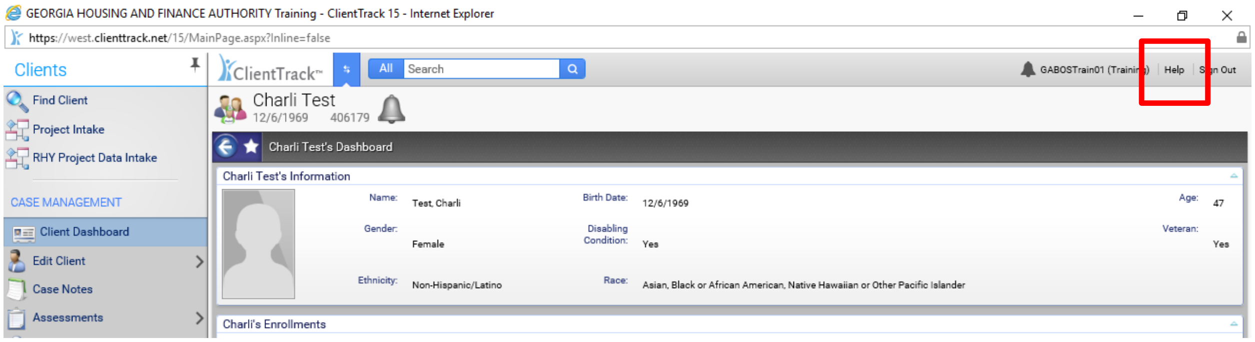
ADDING SERVICES

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**.**

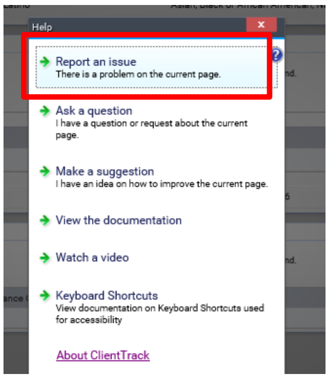


SUBMITTING AN ISSUE OR REQUEST ASSISTANCE

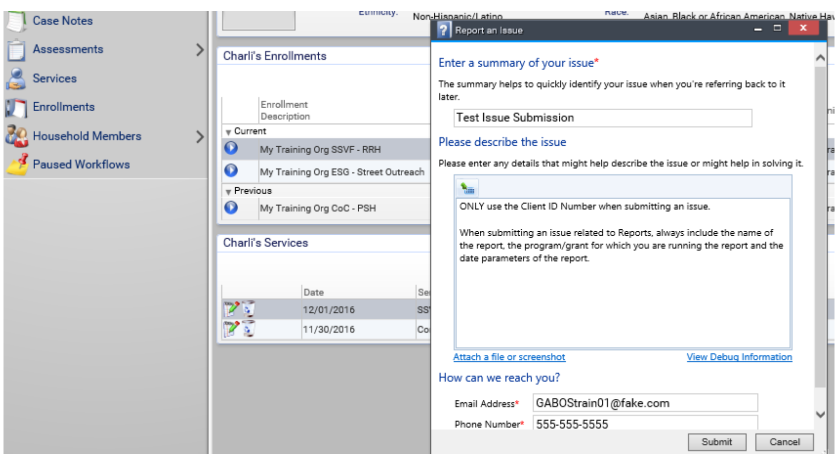
If you need assistance logging into the HMIS, please email the HMIS Support Staff at GAHMISsupport@dca.ga.gov. If you need assistance after logging into the HMIS, please follow the steps listed below. Click on the "**Help**" link in the upper right corner of the screen.



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.