

HMIS CLIENTTRACK USER MANUAL 2.0

2017

A guide to navigating ClientTrack, a web-based case management tool, including entering basic client information to managing caseloads and reports.

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Objectives

Thank you for using ClientTrack as your Homeless Management Information System (HMIS). HMIS is an electronic data collection system that stores longitudinal client-level information about persons who access a variety of services for homeless prevention and/or rapid re-housing services. HMIS is a valuable resource from the participating homeless assistance and homeless prevention projects in a Continuum of Care (CoC). Aggregate data can be used to understand the size, characteristics and needs of the population at the local, state and national levels. HMIS enables information about client needs, goals and service outcomes.

The content in this user manual will provide information on all of the basic features of ClientTrack and detailed guidance on your day to day data entry, as well as helpful case management tools to optimize your services and time. We believe you will find this web-based case management system easy to use and essential in sharing your impact.

In this manual you will find the following information:

- Contacts
 - o HMIS Help Desk Information
- Review Security Policies and Procedures
 - Consent Policy
 - Computer Storage
 - $\circ \quad \text{User Name and Password} \\$
- Overview of ClientTrack Features
 - o User Dashboard
 - Case Management Tools
 - o Client Record
 - Household Members
- Entering Client Information and Managing Project Enrollments
 - o Intake Workflow
 - o Services
 - Case Notes
 - o Update/Annual Assessment
 - Exit Workflow
- Submitting a Help Desk Ticket/Contacting GA HMIS Support Staff
- Basic Reports
 - Service Summary
 - Annual Performance Review (APR)

Contacts

GAHMISSUPPORT@DCA.GA.GOV

HMIS Help Desk

If you encounter any issues with ClientTrack at any time, please contact the help desk with the email address below. Please do not send any identifying information for clients when emailing the help desk. There is a unique client ID number assigned to each client record in the system and you can find this number by hovering over the client name at the top of the client record. **Please use the ClientTrack client ID number when emailing the help desk if applicable.**

HMIS Help Desk: GAHMISsupport@dca.ga.gov

Security Policies & Procedures

Personal Protected Information (PPI) is considered any information that could lead to individual identification. Agencies participating in HMIS should have procedures in place for the secure storage and disposal of hardcopy and electronic data generated from ClientTrack or created for entry into ClientTrack. PPI should be stored in locked drawers/file cabinets and hardcopy data should be shredded before disposal. Electronic PPI including data contained on disks, CD's, jump drives, computer hard drives and/or other media should be reformatted before disposal.

PRIVACY AND CLIENT INFORMATION RESTRICTIONS

The Notice of Privacy Practices including the purpose for data collection should be posted in a public area and in an office where an intake professional meets with clients. The full privacy policy notice should be posted on the web sites of agencies, as well as made available to clients who request it. The document is called "Intake Posting" and can be downloaded from the Georgia Department of Community Affairs website at http://www.dca.state.ga.us/housing/specialneeds/projects/hmis.asp

In order share transaction date (enrollments and services) a signed client consent form is required. A client who presents to your agency for services and provides information needs to provide consent to share certain data in ClientTrack. Data collection and data sharing are topics that should be discussed with the client at the time of intake. Some project enrollments (and information related to those enrollments) are restricted and only the enrolling organization will have access to those records. *No person should be refused services regardless of their participation in ClientTrack.*

CLIENTTRACK COMPUTERS

All computers used to access ClientTrack should be situated in secure locations. ClientTrack computers in publicly accessible areas should be staffed at all times and not viewable by other individuals. All computers should be password protected, and the password you use to log onto your computer should NOT be the same password as your ClientTrack password, but rather a password to prevent access to the computer itself.

ClientTrack usernames and passwords should NEVER be shared with other users. Users should not keep username/password information in a public location (i.e., sticky notes on monitors or filed under HMIS or Password in a Rolodex). ClientTrack security policies require the use of strict passwords. Passwords must have:

- •At least one number
- At least one non-letter, non-numeric character
- •Between 8 and 12 characters
- At losst one capital lottor
- At least one capital letter

New passwords will be required upon first login. **Accounts are automatically deactivated after** 60 **days of inactivity for security purposes.** You will be required to change your password every 60 days for security purposes. If you need assistance with your username and password contact the HMIS Help Desk by emailing <u>GAHMISsupport@dca.ga.gov</u> and someone will assist you.

CLIENTTRACK ACCESS

You can access HMIS with the following link:

www.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 <u>www.clienttrack.net/gahmis</u>. 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.**

		Help	
	What's New		
CicentTrack Sign in to ClientTrack User Name Train33@fake.com Did you forget your paseworl? → Sign in	Description Control Control Control Control Hathcase providers are under pressure to improve population health actionary social services providers are under pressure to brand pressure to expand services with limited resources. These trafficionally sile-description of the control service providers are under pressure to improve control privation of the control services and work together to improve control privation of the control service privation of the conto service privation of the conto service privation of		
Visit <u>www.clienttr</u>	rack.com for more information.		

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.

workgroup	
GA HMIS: HMIS Programs GA HMIS: Street Outreach	ALLURData® Inc. and Eccovia Solutions™ Partner to Offer Outcome- Based Care Coordination for Health and Human Services Whole Person Care
Organization	11/21/2016
My Training Organization	November 21, 2016 – ALLURData Inc., a leading organization in health information technology, is pleased to partner with Eccovia Solutions to deliver a joint care coordination, health data integration and a health information business intelligence offering. Healthcare
My Training Location	providers understand that health care costs are at capacity. Only by addressing the social determinants of health and [] The post ALLURData⊜ Inc. and Eccovia Solutions™ Partner to Offer Outcome-

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

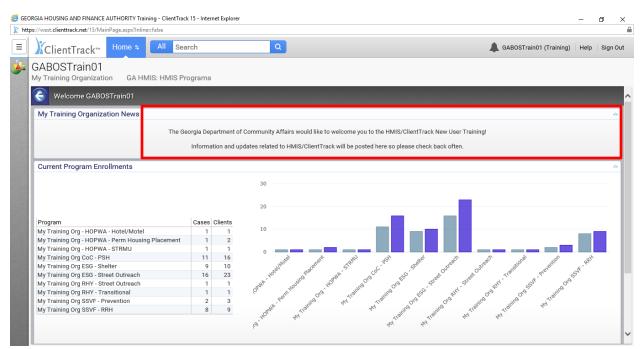
Most Users will choose the GA HMIS: HMIS Projects Workgroup (emergency shelter, transitional housing, rapid re-housing, prevention, services only, etc.)

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

Overview of ClientTrack Features

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.



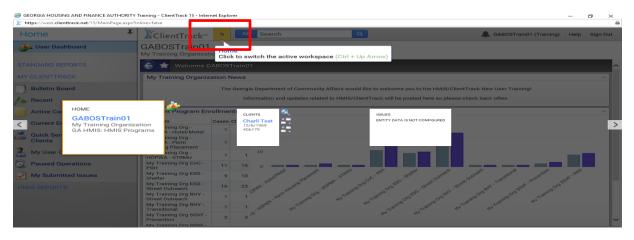


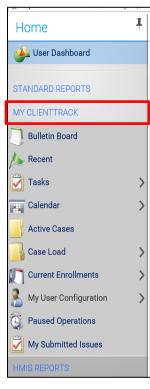
When you first log onto the system, you may want to "Pin" the menu on the left side of the screen. In order to "Pin" the menu, click on the box highlighted in red below.

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

Home	★ ClientTrack [™]
yuser Dashboard	Always show the menu
STANDARD REPORTS	My Training Organization

You can access all three screens, **"Home," "Clients"** and **"Issues"** which provide you different features for managing your cases by clicking on the link with arrows beside the ClientTrack logo outlined with the red box below. After clicking on that icon, you will see the three boxes appear labeled, **"Home," "Clients"** and **"Issues"** and you can toggle between them by clicking on the appropriate box to take you to that section of ClientTrack as seen below.





On the **"Home"** screen there is also a list of **Menu Items** that give you easy access to your current case assignments, case notes and more under **"My ClientTrack."** You can also change your password with the **"Change My Password"** link by clicking on **"My User Configuration"** in the list of Menu Items. All of these tools are designed to maximize your time and grant you easy access to your client records.

You will also find the **"Reports"** section on the **"Home"** screen. To run a variety of reports, which will be detailed later in this manual, click on **"Reports"** found above **"My ClientTrack"** in the upper left-hand corner of the screen to access reports.

"Active Cases" will show a list of clients for which you are designated as the Case Manager. This is not necessarily the clients actually enrolled in you project.

"Current Enrollments" will allow you to select a particular project and view clients that have an official open enrollment in the selected project.

You can view and complete any Paused Workflows by selecting the **"Paused Operations"** menu option.

You can manage **Issues** that have been submitted to Help Desk via the ClientTrack Issues Workspace.

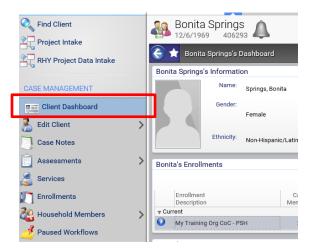
SELECTING THE CLIENT WORKSPACE

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:



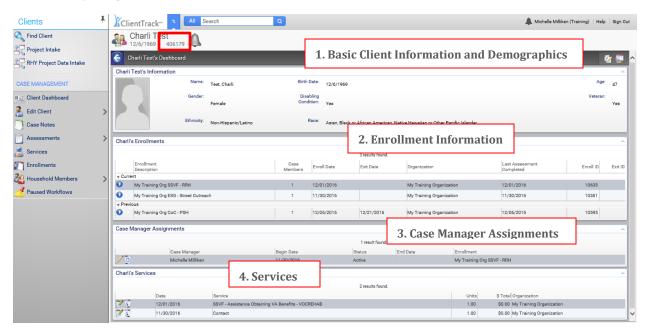
- **Find Client** To search for a client in the system by first and last name, date of birth, social security number, client ID number, etc. Remember, you will get the most returns if you only use the first few letters of the first and last name of the client.
- **Project Entry** To enroll a client in your project. **RHY Project Data Intake** is designated for projects funded by the Runaway and Homeless Youth project and will call very specific assessments related to those projects.
- Case Management Tools: (Frequently Used)
 - **Client Dashboard** The overview of the client record as seen on the next page.
 - Edit Client To edit basic client information like address, date of birth, social security number, disabling condition, veteran status, etc. There are more helpful tools under "Edit Client" that are available for you to use depending on your agency's needs and requirements. You can add "Interested Others", Review an Alias Name History, Review Address History, Update Case Manager Assignment and Review Notifications.
 - **Household Members** To review household members and manage household accounts.
 - **Assessments** To review assessments and please note that all required assessments for your project are captured in the Intake Workflow.
 - **Enrollments** To view the list of current and past enrollments.
 - **Services** To add, edit and view the list of services the client has received.
 - **Referrals** To add and manage referrals provided to a client.
 - **Case Notes** To create, edit and view case notes.
 - Paused Workflows To resume a workflow you previously paused.

• **Basic Client Information** - Located at the top of the client record and includes the client's name, gender, date of birth, etc. The client ID number can be found in the client demographic section of the Client Dashboard (Client ID Number is required when communicating electronically about a client record, i.e., requesting assistance from the help desk).

CLIENT RECORD

The client record is broken up into sections with case management tools to help you easily find client information and manage project enrollments, services, case notes, and more.

1. At the very top of the client record, you will see the **client's basic information** and demographics as shown below. You can find the client ID number (in the red box) in the client demographic area, which is automatically assigned to the record when created.



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.

Clients	F)ClientTrack™	All Search Q		🌲 Michelle Milliken (Training) Help. Sign Out									
Find Client	Flash Gordor	314 🔔											
Project Intake	C 🛨 🦯 Information	Elease and Security											
	Client Photo	Client Photo the organizations thru an existing information Release agreement, select an Information Release # using the lockup. Enter the Begin Date and optional End Date for sharing this client's record. Select this											
CASE MANAGEMENT	👳 Information Release	Restriction.											
Client Dashboard		will override any information releases and hides the fo Release allows only the organizations granted aco llows all organizations to access the client intake and	ess to the client record thru Information Release/Exc	septions to access the client record.									
Edit Client	Case Managers	Information Release #:											
Case Notes	A Notifications	Begin Date:	12/29/2016										
Assessments	Galaxies Address History	End Date:											
Services	Jlias History	Security Restriction:*	 Restrict to Organization Share Intake to MOU/Info Release 										
Enrollments		Circular and	 Share Intake Globally 										
Contract Household Members	>	Signature:											
d Paused Workflows													

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.

2. In the center of the client record, you will see all of the client's past and present **project enrollments** as seen below.

1					3 results round.					
Enroliments	Enrollment Description		Case Members	Enroll Date	Exit Date	Organization		Last Assessment Completed	Enroll ID	Exit ID
襁 Household Members	▼ Current									
~ •	My Training Org SSVF - RRH		1	12/01/2016		My Training Organization		12/01/2016	10635	
Paused Workflows	Edit Enrollment Workflow	ch	1	11/30/2016		My Training Organization		11/30/2016	10361	
	Add Family Member									
	📲 🙋 View Case Members		1	12/06/2016	12/21/2016	My Training Organization		12/06/2016	10595	
	C 🖧 Update/Annual Assessment									-
	🛶 Link Assessments									
	Associated Assessments				2 results found.					
		Service					Units \$	Total Organization		
	📲 🏭 Exit the Enrollment	SSVF - Assistance Obtaining	VA Benefits - VO	OCREHAB		1.00 \$	0.00 My Training Organization			
	👖 🙀 Review Entry Assessments	Contact						\$0.00 My Training Organization		
	📉 🗙 Delete Enrollment									

There is a blue play button/action wheel (as seen in the red box above) you can click on to easily manage your project enrollment. When you click on the blue play button, a drop down list will appear where you can:

- Edit Enrollment Workflow Edit the enrollment date with this feature.
- **Re-enter the Enrollment** Use this feature to re-enroll a client who was *accidentally* discharged or his/her enrollment status changed to continue services. This option should be used sparingly and is only allowed certain circumstances.
- Add Family Member Use this feature if a new household member needs to be added to the household and enrolled after an enrollment has already been established, i.e., a new baby is born and needs to be enrolled. Make sure you're on the head of household's client record when adding a family member to the enrollment.
- View Case Members View all case members associated with the specific project enrollment. Use this option to verify which household members are actually enrolled in a project. The list of household members found on the family icon/family portrait does not necessarily indicate which members are actually enrolled in your project.
- **Update/Annual Assessment** Use the Update/Annual Assessment to conduct annual assessments or capture changes to a client's status since enrollment. You will also use this workflow to update an enrollment with a Move in Date (RRH projects) and Engagement Date/PATH Enrolled Status (street outreach/PATH projects).
- **Exit the Enrollment** To exit a client, select "Exit the Enrollment" and you will be prompted through the exit workflow for the client and all household members if applicable. If you need to only exit one household member, go to the specific household member's client record and conduct the exit workflow without exiting the household.
- **Review Entry/Exit Assessments** You can review the assessments completed at entry and exit with this feature without going through the workflow. This is helpful in completing missing or inaccurate data that was not captured at those points in time.

3. Case Manager Assignments can be managed by clicking on the case manager assignments link, you will be taken to a screen where you can edit the status of a case manager for a specific project enrollment or add new case managers to the client record.

Clients F	ClientTrack	All Search	٩			🌲 Autumn Gale (Training) 🗏 Help 🗏 Sign Out						
C Find Client	Jane Do 123-45-678											
	G Jane Doe's Dast	Jane Dolf Deathbaird 🕨 🔍 Case Manager Assignments 🖉 😨 🕃 21 🐛 😰 🗖 🕅										
CASE MANAGEMENT		The client history of assigned case managers displays blow. To view or edit a case manager assignment, click the Edit next to the record. To add a new case manager assignment, click the Add Case Assignment. To print a list of the client's history of assigned case managers, click case Managers Report.										
Client Dashboard												
Edit Client						🚔 Add Case Assignment 📕 Case Managers Report						
Family Members				1 m	esult found.							
Assessments		Case Manager 🔺	Begin Date 🔝	Status 🛥	End Date 🛥	Enrollment 🔺						
	10	Training 02	03/25/2015	Inactive	04/01/2015	My Fake Organization - (CoC-R10)						
Enrollments												
Services			-									
🔮 Referrals												

4. Services associated with a specific project enrollment will be listed at the bottom of the client record. You can manage your client services by clicking on **"Services"** in the list of case management tools on the left-hand side of the client record or by clicking **"Services"** above the list of services on the client record. Documenting services is discussed in detail starting on page 32 of this manual.

Clients	Ŧ	Client	rack™ 🕴 📶	Search Q		A Michelle Milliken (Training) Help Sign Out
C Find Client		Cha 12/6/	rli Test 1969 406179 🔎			
RHY Project Data Intake			Client Services service history displays b	elow. To record a service, click Add New. To record multiple services, click Quick Services. To edit or	view an existing se	vice, click Edit next to the record.
CASE MANAGEMENT						🗢 Add New
Edit Client	>			2 results found.		
Case Notes		100 0 T P	Date 💙	Service 🔺	Units 🛋	\$ Total 🔺 Organization 🔺
а.		28	12/01/2016	SSVF - Assistance Obtaining VA Benefits - VOCREHAB	1.00	\$0.00 My Training Organization
Assessments	>	1	11/30/2016	Contact	1.00	\$0.00 My Training Organization
Services						
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Household Members	>					
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HOUSEHOLD MEMBERS

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🔍 Find Client		.	Test, Charli -	1969											
Project Intake			<mark>Charli Test</mark> Age 47	Self		>	2	Mandy Test Age 11	Daughter		>				🚱 👼
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CASE MANAGEMENT					Name:	Test, Char	łi		Birth Da	ite: 1	2/6/1969			Age	^E 47
Client Dashboard				0	Bender:	Female			Disabli Conditi	ing on: Y	'es			Veteran	n: Yes
🚴 Edit Client	>														
Case Notes				Et	hnicity:	Non-Hispa	inic/La	atino	Ra	ce: A	sian, Blac	k or African American, Native Hawaiian or Other Pacific Islander			

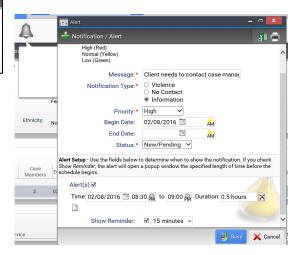
You can view household members and their client records by clicking on the **Family Icon/Family Portrait** at the top of the client record beside the client name. A window will appear with all of the current household members. You can click on the names of the household members in the window to go directly to his/her client record.

NOTIFICATIONS

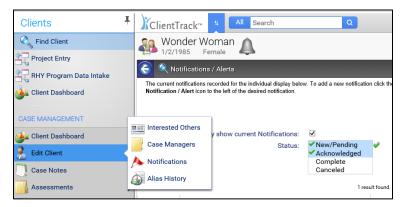
ClientTrack features a **"Notifications"** tool on the client record that allows you to set up alerts specific to the client, like recurring appointments, required documentation, client deadlines, etc. The Notifications tool is located beside the client's name at the top of the client record. To add a new notification, click on the bell and a new window will appear below it. Select **"Add New"** to add a new notification.

ClientTra	ıck™ <mark>≒ All</mark> Search	n Q	
Wond 1/2/198	ler Woman		
🕘 Wonder V	Voman's Dashbo	Notifications	♥ Upcoming
Wonder Woma	an's Information	View Notif	fications
	Nami	No notifi	cations
	Gende	Add Notification	Open Calendar
	Female	Co	ridition: Yes
	Ethnicity:		Race:

A new window will open where you can set up the new notification as seen below.



After setting up the notification, you can review your notifications and calendar by clicking on the bell and selecting **"View Notifications"** as seen below. You can also view notifications by hovering on the Edit Client menu option on the left of the client record.



Entering Client Information and Managing Project Enrollments

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. You may search for a client by entering one or more of the following:

- Letters of the client first/last name (use as few letters as possible of the first and last name to conduct a thorough search)
- Social Security Number
- Birth Date
- Client ID Number

AN 1 1 1				-
Clients	Ŧ	ClientTrack All Search	🌲 Michelle Milliken (Training) 🗌 Help	Sign Out
Find Client		Charli Test 12/6/1969 406179		
Project Intake		Charli Test's Dashboard		😰 😅 i

It is important to try different options for your search. Again, it is best to ONLY enter the first few letters of the first/last name and not rely solely on a social security number or birth date, as those elements have a higher rate of missing or inaccurate data. Another option for searching is to search different spellings of the client's name and remember to search for nicknames such as "Joe" in addition to "Joseph" or "Jen" in addition to "Jennifer."

Clients F	ClientTrack [™]	All Search	٩		🔔 Michelle Millike	en (Training) Help Sign Out
C Find Client	Charli Test					
Content of the second s	🥃 ★ 🔍 Find Client	w to find your client. To narrow the search, fill	n more than one criteria. Social Security I	Number and Birth Date are the be	est fields to narrow your search.	و 10 🖉 🖉
CASE MANAGEMENT	-	First Nam	e: Char			
Edit Client Dashboard		Last Nam Middle Nam	e: Test			
Case Notes	,	Full Name (Last, Firs Social Security Numb				
Services		Birth Da Client I				
Enrollments Control Members						Search
🥑 Paused Workflows	First Name 🔺 Charlie	Last Name 🛋	Middle Name 🔺	SSN	Birth Date 🛥 12/06/1969	Client ID 💙 406195
	Charli	Test		XXX-XX-8888	12/06/1969	406195 406179

If the client is already in the system, highlight the client name in the search results and click on the **Client Name** to select that record. The selected client's information will be displayed at the top of the screen and all information entered from this point forward while on the client's dashboard will be associated with the currently selected client.

HMIS Support staff continually work to eliminate duplicate clients in ClientTrack. Please contact the HMIS Help Desk or submit an "Issue" with clients who have multiple records in the system. When sending a notification of duplicates or any information regarding clients to the Help Desk, please **ONLY** send **Client ID numbers**. Client ID numbers are found on the Find Client search screen and in the area of the Basic Demographics on the Client Dashboard.

After selecting the client in the search list and going to the client's dashboard, you can begin your enrollment by going to the Project Intake, RHY Project Data Intake workflow or Street Outreach workflow (Street Outreach Workgroup). Please remember, the RHY workflow is specific to Runaway and Homeless Youth projects. If you are using an existing client record, you would choose the **"Use the Current Client"** option and follow the steps in the workflow. If you did not find an existing client record in the system, you would select **"Add a New Client"**.

Clients	Ŧ	ClientTrack [™] ⁵ All Search Q
Find Client		Wonder Woman A
RHY Program Data Intake		Intake Add or Edit Do you want to add a new client or use the selected client?
CASE MANAGEMENT		Add or Edit Basic Client Information We the current client
Edit Client	>	Household Members Program Enrollment Select another client
Case Notes	>	
Referrals	>	
Enrollments	>	
Rousehold Members	>	

ADDING A NEW CLIENT WITH PROJECT 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 project you choose.

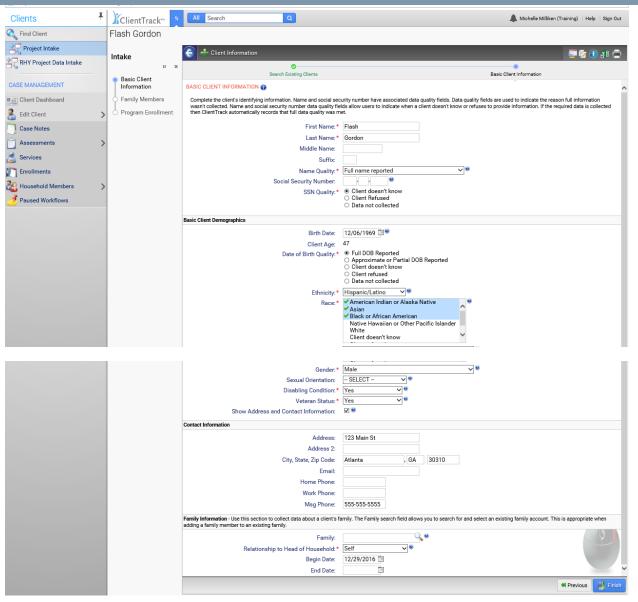
After conducting a search for the client in the system to ensure an existing client record does not already exist, you can add a new client record by selecting **"Project Entry"** in the upper left-hand corner of the screen found under **"Find Client."** Then choose **"Add New Client"** when prompted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

Enter your client's first and last name and click "**Next**." If a duplicate client already exists and was not identified during the client lookup, **a warning in red letters** will be displayed. It is very important to review the displayed list. If the client is already in the system, click the client's name to select the existing client record. If the client you are entering is a new client or you cannot verify that the existing client is the same client you are working with, do not select a client in the displayed list, click "**Next**" to proceed with the intake process.

Clients 4	ClientTrack™ 🗧	All Search	٩		🜲 Train33 (Testing) Help Sign Out
Sind Client	Wonder Woman				
Project Entry	Intake	🧿 🕂 Client Inforn	nation		XI 🖨
RHY Program Data Intake			•		
Client Dashboard	Basic Client Information	Please address the fol	-	ial duplicates. Click Next if this is no	t a duplicate.
CASE MANAGEMENT	Household Members				
Lient Dashboard	O Program Enrollment	SEARCH EXISTING CLI	-		and dualizate entry. Entry and initial identifying
Edit Client		information on the client, If the system finds n	and then click Next to sea o potential matches, you	arch from existing client records. will be taken directly to Step 2.	avoid duplicate entry. Enter partial identifying
Case Notes		existing client record	by clicking on that row.	ch results will display below. If an accurate gain to continue to Step 2 in adding a new c	
Assessments		In there are no accur			lient record.
Referrals >			First Name: Last Name:	Wonder Woman ×	
Services >		Soc	ial Security Number:		
Enrollments			Birth Date:		
Household Members				1 result found.	
-		First Name 🔺	Last Name 🔺	Social Security Number 🔺	Birth Date 🔺
		Wonder	Woman	123-45-6789	01/02/1985
					₩ Next

Add the client's basic information including date of birth, social security number, demographics, disabling condition, veteran status and address. Click **"Finish"** when the client's basic information is complete. **Please note that all of the data elements are self-declared by the client and not attributed by the case manager or data entry personnel.** The option "Data Not Collected" indicates that the question was not asked of the client and will report as missing on reports. Do NOT make up information or answer on behalf of the client.

Clients		ClientTrack	M 5	All Search Q	🜲 Train33 (Testing) Help Sign Out
Sind Client	Fla	ish Gordan			
Project Entry	Int			🧿 🕂 Client Information	a II.
RHY Program Data Intake	Inte	ake	II X	○	
Client Dashboard		Basic Client		Search Existing Clients	Basic Client Information
		Information		BASIC CLIENT INFORMATION	^
CASE MANAGEMENT	¢	Household Merr	bers		Name and social security number have associated data quality fields. Data quality
Lient Dashboard	6	Program Enrolln	nent		rmation wasn't collected. Name and social security number data quality fields allow or refuses to provide information. If the required data is collected then ClientTrack is met.
🚴 Edit Client	>			First Name:	* Flash
Case Notes				Last Name:	* Gordan
Assessments	>			Middle Name:	
				Suffix:	
Referrals	>			Name Quality:	★ Full name reported ✓ ♥
Services	>			Social Security Number:	
Enrollments				SSN Quality:	
	、				Client Refused Data not collected



Definitions of Basic Client Information Requirements

- **First Name** Legal first name (do not add nicknames in "quotes" because those are not searchable elements).
- Last Name Legal last name.
- **Social Security Number (SSN)** If the client doesn't know or refuses to provide their SSN, <u>DO NOT.</u> **under any circumstance, enter a fake social security number** such as 123-45-6789 or 999-99-9999. Select the data quality option that best reflects the client's response.
- **Birth Date** Month, day and year the client was born. Again, do not make up a birth date. Choose the appropriate data quality option that best reflects the client's response.
- **Ethnicity** Hispanic/Latino origin includes individuals of Cuban, Mexican, Puerto Rican, South or Central American origin.
- **Race** A person can identify with multiple races and this is a multi-select box that allows for multiple races to be checked at once. Click on all that apply.

- Gender Select the gender with which the client identifies.
- Sexual Orientation For use ONLY by RHY projects.
- **Disabling Condition** Select the appropriate response as reported by the client. Please note that if the client reports at least one barrier on the Barriers Assessment, then the disabling condition status should be "Yes."
- Veteran Status Select the appropriate response as reported by the client.
- Address Add the address where the client currently resides (emergency shelter, etc.). If the client enters emergency shelter, you should use their previous address. If you edit a previously entered address, the system will maintain a history of current and previous addresses. These can be found under the Edit Client Menu options on the left of the screen.
- **Household** Do NOT enter anything in the "Household" field. ClientTrack will create a household account.
- **Relationship to Head of Household** When entering the first client in the household, the system will default to "Self." It is imperative this information is entered correctly for ALL household members. Otherwise, your reports will not accurately reflect the clients and household make-up. There can only be ONE Self in each Household.

Once you have completed entering this data, select "Finish" to save the data you have entered and move to the next section of the workflow.

Adding Household Members

Next, you will be prompted to add additional household members to include for the project enrollment or services. To add household members, click on the empty box and complete the row of information (name, birth date, etc.) for the new household member(s). You can tab through the fields to complete the required information and add any number of household members at this time by repeating these steps.

Ξ	ClientTrack™ ^{Cli}	ients \$	All Search	h		٩		🜲 Train33 (Testing)	Help Sign Out				
	Flash Gordan												
	Intake												
<u>i</u>	 Basic Client Information 	lt's imp househ	ortant to note the	at househ dividual o	or a group of person	s who apply	ho the client is related to. Family isn't always the same together to a continuum project for assistance and wh						
	 Household Members Program Enrollment 		who are not housed, who would live together in one dwelling unit if they were housed." (Data Manual) This workflow will allow you to enroll all household members or select which household members you want to enroll.										
		+					1 result found (+2).						
		□ First Name	▲ Mid		Last Name 📥	Suffix 🔺	Name Quality* 🔺	Gender* 🥑 🔺	Other Gender, please specify 🔺				
		✓ Flash		c	Gordan		Full name reported 🗸 🗸	Male 🗸					
		✓ Capt	ain		America 🤱		Full name reported 🗸 🗸	SELECT					
					9		SELEUT V	- SELECT - V					

The system will automatically conduct a search for the new household member after you enter the first and last name. If the new household member is already in the system, click on the appropriate name in the search list that appears in the new window to attach the existing client record to the household. If the household member is a new client, click on **"Cancel"** in the search window and proceed entering the new household's information in the required data fields. Click **"Save & Close"** when finished adding household members.

	ClientTrack [™] ^{Clie}		Q Search		🔔 Train33 (Testing) Help Sign Out
0	Flash Gordan		Find Client	81 x# 🖨 🖥	1
	Intake	E	Use the section criteria below to find your cl Number and Birth Date are the best fields to	lent. To narrow the search, fill in more than one criteria. Social Security narrow your search.	
	н х	Th the	First Name:	Captain x	ew clients to the database and associate
	 Basic Client Information 	lt's	Last Name:	America	ousehold. According to HUD "[a] r in one dwelling unit (or, for persons
	Household Members	wh	Middle Name: Full Name (Last, First):		The one arreining and (or, for persons
	Program Enrollment	Th	Social Security Number:		
		+	Birth Date: Scan Client ID:		
			courrent is.	Sear.	b. Other Gender, please specify 🔺
		✓ F			~
		☑ (· · · · · · · · · · · · · · · · · · ·
					· · ·
				X Canc	el 📕 Save 🔛 Save & Close

Please pay close attention to the Race and Ethnicity fields when adding household members. They will default to the Head of Household selections. If you need to change the Race, click on the blue hyperlink, make necessary changes and click on the green circle with the check mark.

Case Notes		(➔) 1 result found (+2).										
Assessments	>	4	SSN 🛋		SSN Quality* 🔺	Relationship to Head of Household* 🛦	Disabling Condition* 🛎	Veteran Status* 🔺			Ethnioity*	P
Enrollments		~			Client doesn't know	Self 🗸	Yes 🗸	Yes	✓ Ame India A	<u>rican</u> n or	Hispanic/Latino	~
Household Members	>	~			Client doesn't know	Other Non-Family 🗸	Yes 🗸		Ame India A		Hispanic/Latino	~
2 Paused Workflows		~	•	•	SELECT V	- SELECT V	SELECT 🗸	SELECT	~		- SELECT	~

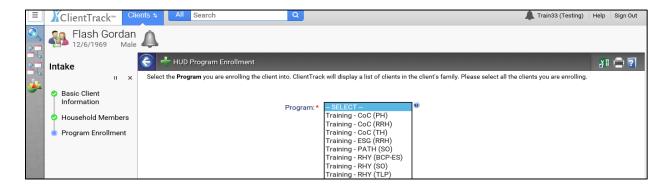
If you are alerted to an error after selecting **"Save & Close"**, you should scroll all the way to the right and hover over the red circle with an exclamation point. Go back and address the issues and choose **"Save & Close"** again.

Ξ	ClientTrack™ ^{Cli}	ents 🕏 🛛 All Se	arch	Q		🔔 Train	33 (Testing) Help Sign Out
	Flash Gordan						
	Intake	Please address the	· · · · · · · · · · · · · · · · · · ·				sı 📲 🚍
*	 Basic Client Information 				arch for existing clients to ad	d to this household or add new clients t	to the database and
	Household Members Program Enrollment	household is a sing		ons who apply together to	a continuum project for assi	vays the same as a client's household. A istance and who live together in one dw	
		This workflow will a	llow you to enroll all househo	d members or select which	n household members you w	ant to enroll.	
		+			1 result found (+2).		
			Relationship to Head of Household* 🔺	Disabling Condition* 🔺	Veteran Status* 🔺	Race* Ethnicity* 🔺	Pregnancy Status 🔺
		~	Self 🗸	Yes 🗸	Yes	• The family member's Birth Da	te cannot be in the future.
		~	Other Non-Family 🗸		Ļ	Indian or Hispanic/Latino V	0
		< <	SELECT V	SELECT V	SELECT V	SELECT V	>
							Save Save & Close

**Please note that the "Save" button will save the changes made to the screen and leave you on the same page. The "Save & Close" button will save the changes you have made to the screen and move you to the next one.

Project Enrollment

Projects vary in their data requirements and ClientTrack will prompt you through the workflow to collect all of the required HUD (or other Partner agency) data elements for your specific project. Please note that all fields with an asterisk * are required data fields and you will not be able to proceed in the workflow until all of the required information is completed.



Select your **"Project"** with the drop down box and then select which household members to enroll by clicking on the box beside the client name. If a check mark appears by a client name on the project

enrollment screen (as seen below), the client will be enrolled in your project. You can de-select a client by clicking on the check mark beside his/her name again to remove the check mark and ensure the client is not enrolled.

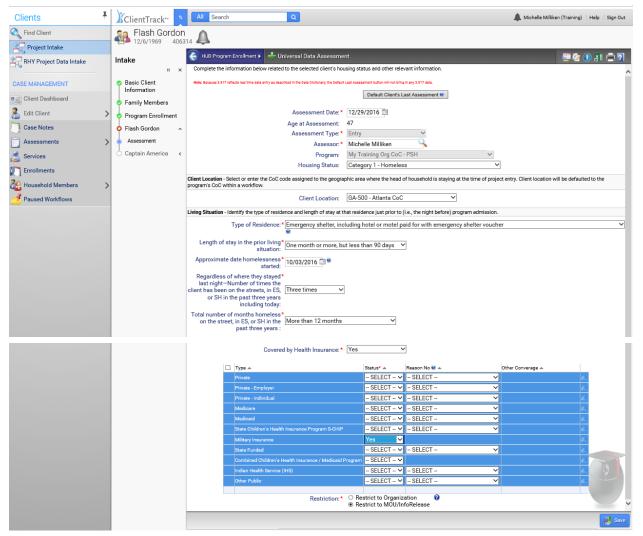
Clients	Ŧ			All Search		Q				🌲 Michel	le Milliken (Training) Hel	p Sign Out
Find Client		Flash Gordon	n 6314 (
RHY Project Data Intake		Intake	E	/ HUD Progra	ım Enrollmen		into. ClientTrack will dier	lay a list of clients in the cli	ant's family. Diaase s	elect all the clients you are enrol	🕎 🝞 🕕 2	
CASE MANAGEMENT		 Basic Client Information 	3	elect the Program yo	u are enroning	uie cilent		Training Org CoC - PSH		elect all the clients you are enfor	ing.	
📰 Client Dashboard Ldit Client	>	 Family Members Program Enrollment 	Hou in or	sehold - Excerpt from ne dwelling unit (or, fo	the HMIS Data or persons who	Standard are not h	/s Manual "A household is		up of persons who ap	ply together to a continuum proj	ect for assistance and wh	o live together
Case Notes		🔉 Flash Gordon 🧹					Project			Relationship to		
Assessments	>	🖞 Captain America 🛛 🗸	-				Entry Date		0	Head of Household* 🔺		
Services			× V	Gordon, Flash America, Captain	Male Male	47 11	12/29/2016 12/29/2016	Michelle Milliken Michelle Milliken		Self v Other Non-Family v		
Enrollments			-		2		Restriction:* O	Restrict to Organization	0			
Content of the second s	>							Restrict to MOU/InfoRe				
Aused Workflows												

Remember to change the Enrollment Date if you are back dating the information. To ensure accurate data quality, enter all client data in a timely manner.

If you do not find your program option when enrolling a client, cancel the workflow by clicking the black **"X**" in the workflow screen found in the upper left-hand corner and please notify HMIS Staff immediately at **GAHMISsupport@dca.ga.gov**. Program information must be set up in the system before you can begin to enroll clients.

HMIS Universal Data Assessment

Complete all the required data fields indicated by an asterisk * and click "Save" to continue.



Definitions of Universal Data Requirements

- Assessment Date Date the assessment was completed with the client (field will auto-fill with the Project Entry Date).
- **Housing Status** Choose the appropriate category for the housing status of the household. This is based on the household's housing condition just prior to project entry. More extensive definitions can be found by clicking on the blue information circle located in the upper right-hand of the screen beside the printer icon.
- Living Situation Data in this section are used along with disabling condition to determine whether or not a client is chronically homeless. *HUD strongly encourages HMIS users to just ask the client for the information and record the client's answer. Attempting to tie each individual response with definitions or documentation requirement is not the attempt of this question.*
- Depending on the project to which you are enrolling a client and the Living Situation of the Client, you will have different questions that are required to be answered. For a more detailed explanation of the options, please refer to pages 26-35 of the latest version of the HMIS Data Standards.
 <u>file:///C:/Users/Michelle/AppData/Local/Microsoft/Windows/INetCache/IE/WTT1CBYK/HMIS-Data-Standards-Manual.pdf</u>
- **Health Insurance Assessment** Complete the required information pertaining to the client's insurance status. If a client's health insurance status has changed, change the status of the type of insurance to "No" and then add an end date. Then you can change the Health Insurance status to "No" and click "Save" to continue. Start and End Dates are not required.

HMIS Barriers Assessment

The system defaults **"No"** for all barriers when you select the empty box in the upper left of the list of Barriers. To select a barrier, click on the drop down box for **"Barrier Present"** and change the status to **"Yes."** Complete any required fields that appear after selecting that specific barrier. It is important to keep in mind that clients must have at least one barrier to be eligible for some projects (such as Permanent Supportive Housing). If **no barriers** are present at enrollment, select all barriers and leave the **"Barrier Present"** status as **"No"** and click **"Save & Close."**

Clients	Ŧ	ClientTrack [™]	All	Search	Q				A Michelle Milliken (1	raining) Help Sign Out
🔍 Find Client		Flash Gordon								
RHY Project Intake	>	Intake Basic Client Information Family Members Program Enrollment	G HUD Use this	form to identify ion about the de				layed as a default.	You may, optionally, click Previous	XIII XIII XIII XIII XIII XIIII XIIII XIIII XIIII XIIII XIIII XIIII XIIIII XIIIII XIIIII XIIIII XIIIII XIIIII XIIIIII
Case Notes	>	Flash Gordon Assessment			Ide	tified Date:* 12/29/201	6			
Services		Barriers / Special Needs Domestic Violence		Barrier 🛥	Help Barrier Present?* ▲	Receiving Services / Treatment 🛋	Condition is Indefinite 🛥	Documentation of the disability and severity on file		Restriction 设* 🔺
		Income		Alcohol Abuse		✓				Restrict to MOU/Info
Household Members	>	Ŭ		Chronic Health Condition	? Yes	∼ No	✓ Yes ✓	No 🗸	COPD	Restrict to MOU/Info
🤔 Paused Workflows		🖒 Captain America 🛛 🕻	2	Developmental Disability	⑦ No	✓				Restrict to MOU/Info
			-		⑦ No	$\overline{}$				Restrict to MOU/Info
			2	HIV/AIDS	No	~				Restrict to MOU/Info
				Mental Health	Yes	✓ No	✓ Client doesn't know ✓	No 🗸	PTSD	Restrict to MOU/Info
			2	Physical Disability	⑦ No	∼				Restrict to MOU/Info
			<							>

Domestic Violence Assessment

Complete the required information for the Domestic Violence Assessment. Please note that if domestic violence is reported and you select **"Yes"** for **"Domestic Violence Experience,"** you will be prompted for more information. If the client reports no domestic violence, then click **"Save"** to continue through the workflow.

		ClientTrack™	Clients 5	All Search	Q		🜲 Train33 (Testing) 🛛 H	lelp Sign Out
	Ą	Flash Gord	lan 🔔					
	Int	take "		niversal Data Assessment 🕨	Domestic Violence /	Assessment for Domestic Violence Experience, and select when the experience occ	curred.	81 🚍
<u> </u>		Basic Client Information				Default Client's Last Assessment 🥹		
	Ĩ	Household Membe		ment Active				
	•	Program Enrollmen	it		Assessment Date:	10/01/2015		
	0	Flash Gordan	~			 Yes 		
	ø	Assessment	^	Domesti	c Violence Experience :*	○ No ○ Client doesn't know		
	•	Barriers / Special Needs				 Client refused Data Not Collected 		
	•	Domestic Violence		Whe	n Experience Occurred:*	Three to six months ago (excluding six months exactly) \checkmark		
	0	Income			Currently Fleeing:*	No		R

Financial Assessment

Complete the status for **"Income from Any Source"** and **"Non-Cash Benefits from Any Source"** with the provided drop down lists. If the status for either of these financial sources is **"Yes,"** you will be prompted to provide more information on the **"Type"** (definitions below) of income/benefit and the **amount (monthly amount)** with the list that appears below the status after selecting **"Yes."** Please note that Non-Cash Benefits will appear below Income and you will need to scroll down to input that information.

Also input any income a child may receive (i.e., SSDI) on the head of household's income/benefits information. You will not complete a separate Financial Assessment for children in the household.

Ξ);	ClientTrack [™] ^C	lient	s 🛊 🛛 All	Search Q				Train33 (Testing)	Help Sign Out
	Į	Flash Gordar								
	Int	take	As	S		81 🖨				
<u>ينه</u>	•	Basic Client Information			Assessment Date:*	10/01/2015 🔳				
	0	Household Members				Yes	~ @			
	0	Program Enrollment			Non-Cash Benefits from Any Source:*	Yes				
	Flash Gordan									
	0	Assessment A	Inc	ome						
	0	Barriers / Special								
		Needs		Тур	e 🛆		Description 🔺			Monthly Amount 🔺
	Ĩ	Domestic Violence	☑	Earr	ned Income (i.e., employment income)		Wendy's Part time			\$200.00 🔊
		Income		Une	employment Insurance					
	Ó	Captain America <		Sup	plemental Security Income (SSI)					
			☑	Soc	sial Security Disability Income (SSDI)		Income from Captain Americ			\$674.00
				Vete	eran's Disability Payment					
				Priv	vate Disability Insurance					

Definitions of Sources of Income

- **Earned Income** Employment income
- Private Disability Insurance Income received from private disability insurance
- Unemployment Insurance Unemployment benefits from the State
- Worker's Compensation Income for an individual who has been injured on the job
- Other Pension Income from a private employer or military retirement pay
- **Supplemental Security Income** A federal project providing additional income for older and disabled individuals with little to no income stream
- **Social Security Disability Income** A monthly compensation to individuals who can no longer work due to their medical conditions
- **Retirement (Social Security)** Income payment provided by government for individuals who qualify
- Alimony Income received for spousal/partner support
- Veteran Disability A benefit paid to a veteran because of injuries or diseases that happened while on active duty or were made worse by active duty
- Veteran's Pension Needs based pension provided by the VA
- TANF Temporary Assistance for Needy Families
- Child Support Income received from one parent to another to care for children
- **Other Income** Any income not previously listed

Non-C	Cash Benefits			
	Type 📥	Description 🔺	Monthly Amount #	Restriction 设* 🔺
2	Supplemental Nutrition Assistance Program (SNAP) (Food Stamps)		\$225.00	Restrict to MOU/InfoRelease ✓
	Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)			Restrict to MOU/InfoRelease 🗸
	TANF Child Care Services			Restrict to MOU/InfoRelease 🗸
	TANF Transportation Services			Restrict to MOU/InfoRelease 🗸
	Other TANF-funded Services			Restrict to MOU/InfoRelease 🗸
	Section 8, Public Housing, or Other Ongoing Rental Assistance			Restrict to MOU/InfoRelease 🗸
	Other Source			Restrict to MOU/InfoRelease 🗸
	Temporary rental assistance			Restrict to MOU/InfoRelease 🗸
	Count/Total Monthly Income	2	\$225.00	
	Restriction:* O Restrict to O	ganization 😯		
	 Restrict to M 			
				🔣 Save and (
				Save and

Definitions of Non-Cash Benefits (Specific Amounts are not Required Except for SNAP)

- **Food Stamps/Money for Food on Benefits Card** Monthly payments issued by the government to persons with low income that can be redeemed for food at certain stores.
- **Special Supplemental Nutrition Project for Women, Infants and Children (WIC)** A project geared toward supplying nutritional food for at risk pregnant women and their families.
- TANF Child Care Services Child care funding assistance
- TANF Transportation Services Transportation funding assistance
- Other TANF Funded Services
- Section 8, Public Housing or Other Ongoing Rental Assistance (PSH) Low- and moderateincome housing subsidized by the federal Department of Housing and Urban Development (an amount is not required)
- **Temporary Rental Assistance (RRH)** ESG rental assistance or transitional (an amount is not required)
- **Other Source** Any source not previously listed above.

Pausing a Workflow

Please pay special attention to the process/workflow you are completing. Should you be interrupted during the workflow process, you may **"Pause"** a workflow by clicking on the pause button located in upper right-hand corner of the workflow menu beside the black **"X"** (as seen above in the red box). The black **"X"** will cancel the workflow. The pause feature will allow you to pause the workflow at any time so you can return to it later.

Clients	Ŧ	ClientTrack 🗠 📑	All Search Q		🌲 Michelle Milliken (Training) Help Sign Out
Sind Client		Captain Amer			
Project Intake			ae workflow		
RHY Project Data Intake		Intake	niversal Data Assessment Complete the information below related to the selected client's hour	sing status and other relevant information.	👼 🕐 🕕 X II 🚍 🕅
CASE MANAGEMENT		 Basic Client Information 	Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default L		
Client Dashboard		Family Members		Default Client's Last Assessment 🥹	
🚴 Edit Client	>	Program Enrollment	Assessment Date:*	12/29/2016	
Case Notes		Flash Gordon <	rige at rise content.	11	
Assessments	>	🗴 Captain America 🔺	Assessment Type:* Assessor:*	Entry V Michelle Milliken	
Services		 Assessment 	Program:	My Training Org CoC - PSH	
T Enrollments			Housing Status:	SELECT V	
R Household Members			Health Insurance - Please indicate whether or not the client is covered	by health insurance. If so, you will be able to record health insurance so	urces for the client.
Paused Workflows	,]	Covered by Health Insurance:*	Default Last Insurance Status	

To **resume a paused workflow**, click on **"Paused Workflows"** at the bottom of the list of case management tools located on the left-hand side of the client record. Then click on the blue play button beside your paused workflow to select **"Resume"** in the drop down. This will take you to where you paused the workflow and you can finish your project enrollment.

You can also find a list of Paused Operations in the Home Workspace.

STANDARD REPORTS		Pause	d Opera	ations					^
MY CLIENTTRACK		PAUSE	D FORM	IS					
🗍 Bulletin Board		The list below displays the forms you've paused. You can either resume the process where you left off, or purge the paused operation from the system.							
Necent									
Tasks	>								× Cancel
Calendar	>		Identific			form Description	Step	Time Paused	
Active Cases	1		D WORI			d. You can resume the process where you left off; rest	art the workflow.	merging in changes made in th	ne designer:
Case Load	>				vorkflow from the system.			5 5 5	5.
Current Enrollments	>	Show	Complete	ed Work	lows				
🕺 My User Configuration	>				Description	Workflow			Closed
Paused Operations		}-		×	Gordan, Flash	HMIS 2014 Program Data			
		}-		×	Benes, Elaine	HMIS 2014 Program Data			
My Submitted Issues		┣		×	Benes, Elaine	HMIS 2014 Program Data Annual Assessment			
HMIS REPORTS		}-	•	×	Kramer, Kosmo	HMIS 2014 Program Data Annual Assessment			

HMIS Universal Data Assessment for Child

Complete the required data elements for the child on the HMIS Universal Data Assessment. You will notice that the child's assessment does not require as much information as the adult's assessment. Click **"Save"** when finished with the assessment to continue in the workflow.

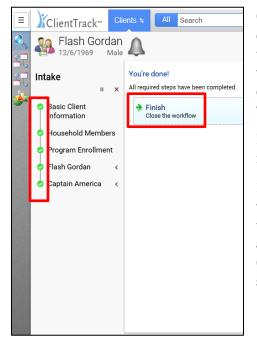
Ξ	ClientTrack™	Clients \$	All Search	Q				🜲 Train33 (Testi	ng) Help Sig	in Out
	Flash Gorda	an 🔔								
	Intake	<u>(</u>	👆 Universal Data Asse	ssment					sı	?
	П	×		Assessment Date:*	10/01/20	15 🖪				^
5	Basic Client			Age at Assessment:	10					
	Information			Assessment Type:*	Entry		\checkmark			
	Household Members	s		Assessor:*	Train33					- 11
	Program Enrollment			Program:*	Training -	CoC (PH) 🗸 🗸				
	📀 Flash Gordan	<		Housing Status:	Category	1 - Homeless	~	•		
	🔉 Captain America	, Health I	nsurance - Please indicate v	whether or not the client is co	overed by he	alth insurance. If so,	you will be able to record health ins	surance sources for the	client.	
	Assessment			Health Insurance:*	Yes	~				
			Note on Existing Source	s - If a client had an insuranc	e source bu	no longer has it. Ple	ease enter an end date and update t	he status appropriately.		
		+								
			Туре* 🔺		ls Prima	ry Status* 🔺	Reason No 🥹 🔺	Start Date 🔺	End Date 🔺	
					_					
			Medicaid		✓ ●	Active 🗸				- 5
			SELECT		✓ ○	SELECT V				•
										Save

HMIS Barriers Assessment for Child

Complete any barrier information for the child you are enrolling. If **no barriers** are present at enrollment, select all of the barriers and leave the **"Barriers Present"** status as **"No"** and click **"Save & Close."**

	ClientTrack™ ^{Cli}	ents 🕏 🗛	Search	Q						Train33 (Testing) Help Sign Out
	Flash Gordan									
	Intake		al Data Assessment rm to identify whetl		idua	al barrier or not. You may, a	optic	onally, click View Barrier	History to review previo	us barriers.
*	 Basic Client Information Household Members Program Enrollment 					Default Las	st As	sessment		E View Barrier History
	 Flash Gordan Captain America 	☑ Ba	arrier 🛆 🖌	o Barrier Present?* ▲		Receiving Services / Treatment 🔺		ondition is	Documentation of the disability and severity on file	Explanation 🔺
	Assessment Assessment Needs	Image: Character of the constraint of the constra	cohol Abuse ⑦ nronic Health ⑦ sability ⑦ vug Abuse ⑦ vVAIDS ⑦ ental Health ⑦ nysical sability ⑦	Yes No No No No	> > > > >	Yes 🗸		es 🗸	Yes V	Epilepsy - currently on meds Compared Compared
										Save Save & Close

Completing the Intake Workflow



Once you have completed the required entry assessments for your client and household members, you will be prompted to **"Finish"** the workflow. If the workflow is complete then click **"Finish."** You will then be directed back to the head of household's client dashboard and you can see the new enrollment under **"Enrollments"** on the client record.

Notice that all workflow processes have been completed. Don't forget to click **"Finish".**

If you need to go back and change information entered in the workflow prior to finishing, you can click on the specific section of the workflow you wish to return to in the workflow window that appears on the left-hand side of the client record (outlined in red). Clicking on the link beside the green dot will take you to that specific section of the workflow where you can edit information.

You now have a completed enrollment.

Clients	Ŧ		s All Se	arch		Q			🔔 Michelle Mil	iken (Training) Help :	Sign Out
🔍 Find Client		Flash Goi	rdon 🛕								
Project Intake											
RHY Project Data Intake		Flash Gordon's	s Dashboard							1	2 🖻
		Flash Gordon's Info	rmation								~
CASE MANAGEMENT			Name:	Gordon, Flash		Birth Date:	12/6/1969			Age:	47
Client Dashboard			Gender:	Male		Disabling Condition:	Yes			Veteran:	Yes
Edit Client	>		Ethnicity:	Hispanic/Latino		Race:	American Indian or Al	aska Native, Asian, Black or Afric	an American		
Assessments	>	Flash's Enrollments	1								_
Services							1 result	t found.			
Enrollments		Enrollment			Case	Enroll Date	Exit Date	Organization	Last Assessment	Enroll ID	Exit ID
Household Members	>	v Current									
Paused Workflows		My Training C	rg CoC - PSH		2	12/29/2016		My Training Organization	12/29/2016	10657	
		Case Manager Assi	gnments								
		1 result found.									
			Case Manager		E	egin Date	Status	End Date	Enrollment		
		/ 0	Michelle Milliken		1	2/29/2016	Active		My Training Org CoC - PSH		
		Flash's Services									4
							No recon	ds found.			
		Date	Service				Units	1	\$ Total Organization		

Unique Project Requirements at Entry

There are variations in data requirements for different project enrollments. In the following section are screenshots of project enrollments and their unique requirements during the Intake workflow for the following projects:

- 1. Rapid Rehousing (RRH)
- 2. Projects for Assistance in Transition from Homelessness (PATH)
- 3. Housing Opportunities for People with HIV/AIDS (HOPWA)
- 4. Runaway and Homeless Youth (RHY)

1. RAPID RE-HOUSING ENROLLMENT

In addition to the previous assessments outlined earlier in this manual, the RRH enrollment will require documentation of a client's **"Date of Move in**", as seen below. All fields with an **asterisk** * are required fields.

- **Project Entry Date** Date client/household is enrolled into the RRH project.
- **Date of Move In** When you complete an Update/Annual Assessment and are adding that the household is now in permanent housing, you will be required to add the Date of Move-In. You should use the date the **client actually takes occupancy** of the unit. The Date of Move In should not be projected or added as the date the lease is signed.

	-		_									
Clients	Ŧ				Q					/lichelle Milliken	(Training) Help Sig	gn Out
🔍 Find Client		Flash Gordo	n									
Project Intake		- 12/0/1909 400										
RHY Project Data Intake		Intake	🔄 🕂 HUD Progr	am Enrollmer	ıt						🔄 😰 🕕 📰 🚍	1 ?
		н х	Select the Program yo	ou are enrolling	the client	into. ClientTrack will disp	lay a list of clients in the cl	ient's family. Please	e select all the clients you are	enrolling.		
CASE MANAGEMENT		Basic Client										
		Information				Program:* M	/ Training Org SSVF - Rf	RH	× 0			
Client Dashboard		Family Members				·						
👤 Edit Client	>	Program Enrollment					a single individual or a gro ether in one dwelling unit i		apply together to a continuur	n project for as	sistance and who live to	ogeth
		• Hogram Enionment						,	<i>.</i>			
Case Notes						Project			Relationship to		1	
Assessments	>				er	Entry Date 🔺			Head of Household* 🔺			
2			🗹 🛛 Gordon, Flash	Male		12/29/2016 💷	Michelle Milliken	_	Self	~		
Services			🗹 America, Captain	Male	11	12/29/2016 💷	Michelle Milliken	O.	Other Non-Family	~		1
Enrollments				2								
A Household Members	>						Restrict to Organization Restrict to MOU/InfoRe					
Paused Workflows												

2. PROJECTS FOR ASSISTANCE IN TRANSITION FROM HOMELESSNESS (PATH) ENROLLMENT

To manage your PATH project and clients in ClientTrack, be sure to log into the **"GA HMIS: Street Outreach"** workgroup. In addition to the entry assessments outlined earlier in this manual, the PATH project enrollment will require you to document:

- **Date of Engagement** Date of Engagement is defined as the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan.
- **Date PATH Status Determined** Date client's enrollment in PATH is determined.
- **Client Became Enrolled in PATH** A PATH enrollment occurs at the point when a client has formally consented to participate in services provided by the PATH project. This does not mean the time at which the client formally consents to services by a community mental health center.

1	Intake	🔵 🕂 I	HUD Pr	ogram	Enrollment							¥I	🚔 🛜
	11 ×	Select the	Program	n you a	ire enrolling the o	lient into. ClientTrack wi	ll display a li	st of clients in the client's	fam	nily. Please select al	l the clients you are	enrolling.	
	 Basic Client Information Household Members Program Enrollment 					ndards Manual "A housel		FH (SO) V e individual or a group of uld live together in one of				n project for assi	stance and
		🗌 Name 🔺	Gender		roject ntry Date 🔺	Case Manager 🥹 🔺		Relationship to Head of Household* ▲		Date of Engagement ▲	Date PATH Status Determined	Client became enrolled in PATH	Reason n enrolled i
		✓ Gordan, Flash	Male	46 0	8/01/2015 🛄	Train33	0	Self	~	08/15/2015 🛄	08/31/2015 💷	Yes 🗸	
		America, Captain	Male	10			Q	SELECT	~	1			
		< 1											

Before completing the Intake workflow, you will also be required to document your PATH contact information as seen below.

Date of Contact, Contact Service and **Contact Location** will also be required as seen below. Complete all of the required data fields to complete the PATH enrollment.

Intak	Intake		C Universal Data Assessment	sh Benefits 🕨 🕂 Contact
	Ш	×	The HMIS Data Standards manual defines a contact "as an inter street outreach worker and the client about the client's well-bein	eraction between a worker and a client. Contacts may range from simple a verbal conversation between the sing or needs or may be a referral to service."
	asic Client formation			
S Fa	amily Members		Assessment Active	
	rogram Enrollmer	ıt	Date of Contact:*	08/01/2015
	ash Gordan		Contact with:	Train10
🖸 Fla	ash Gordan	^	Enrollment: *	08/01/2015 - Training - PATH (SO) 🗸 🤨
O A	Assessment	^	Contact Service :*	PATH - Outreach
	Barriers / Special Needs			SELECT
	Neeus		Exact deographic location:	Place not meant for habitation Service Setting, non-residential
• •	Income			Service Setting, residential
•	Contact		Comments:	
				v

3. HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS (HOPWA) ENROLLMENT

In addition to the entry assessments outlined earlier in this manual, for a HOPWA project enrollment a **"Medical Assistance Assessment"** and **"T-Cell Count/Viral Load Assessment"** are required to be completed for the client as seen below.

С	lients	¥			All Search Q				Autumn Gale (Training) Help Sign	n Out			
	Find Client		Wendy Th	2ma 1/1	as (/1981								
	Intake		Intake		C Veteran Assessment 🕨 Domestic Violence Assessment 🕨 🔚 Assistance Assessm				💷 🧞 🕕 हा 👫 🖨				
	SE MANAGEMENT			×	The medical assistance assessment is primarily used to determine whether HIV positive of HIV/AIDS who are enrolled in a HOPWA-funded program.	ants are accessing medi	ical assistance benefits for	which they may be eligible. Medical assis	stance data is required for clients with	h			
_	Client Dashboard		 Basic Client Information 										
1	Edit Client	>	Family Members		Assessment Active	iment Active							
20	Family Members	>	🗢 Program Enrolime	ıt	Assessment Date:* 09/21/2)15 📰							
	Assessments	>	Wendy Thomas	^	Medical Assistance Type A	Status* 🔺		Reason No (if applicable) 🛎					
0	Enrollments		Assessment	^		Yes	~			đ.,			
2	Services	>	🔿 🛛 Veteran Details		Receiving AIDS Drug Assistance Program (ADAP)	No	~	Applied; decision pending	×	6 .			
2	Referrals		 Barriers / Special Needs 										
	Case Notes		 Domestic Violence 										
	Paused Workflows		 Medical Assistance 	,									
			T-Cell Count/Viral I	oad									

Use the drop down box to change the status of each field to **"Yes"** if the data is reported. After **"Yes"** is selected for **"T-cell (CD4) Count Available"** or **"Viral Load Available,"** additional fields will populate in the blue table below where the specific counts can be entered.

C	lients	Ŧ	ClientTrack [™]	Al Search Q Autumn Gale (Training) Help Sign Out
	Find Client		Wendy Thom	as A
- 71	Intake		Intake	훊 Veteran Assessment 🕨 Domestic Violence Assessment 🕽 📥 T-cell/Viral Measurements 🖉 🚱 👔 💼 🖗
C/	SE MANAGEMENT	_	и х	This data, as is all HIV/AIDS data, is confidential, covered under special law, and may not be shared without the expressed consent of the client. Providing the information is completely voluntary on the client's part and failure to report (i.e. client doesn't know or client refused) will not be considered in data quality for either the CoC or the HOPWA program.
	Client Dashboard		 Basic Client Information 	
1	Edit Client	>	Family Members	Assessment Active
20	Family Members	>	Program Enrollment	Assessment Date: • 09/21/2015
	Assessments	>	Wendy Thomas ^	T-cell (CD4) Count Available:* Ves V Viral Load Available:* Ves V
•	Enrollments		Assessment A	
2	Services	>	🔿 🛛 Veteran Details	S Date Measurement Value How was the data obtained
2			 Barriers / Special Needs 	
Ê	Case Notes		 Domestic Violence 	Viral Load Client Report V d.
	Paused Workflows		 Medical Assistance 	0 363928 999999
			 T-Cell Count/Viral Load 	
			C Income Education	▼ 09/25/2015 📮 T-cell Count Client Report 💙 é.
			Dave Thomas	
			Self Sufficiency	0 789 1500
			Matrix	
			- AMI	

4. RUNAWAY & HOMELESS YOUTH (RHY) ENROLLMENT

HUD and SAMSHA require additional data collection for the Runaway & Homeless Youth (RHY) project in HMIS. When you begin the Intake Workflow for a new client, you will be prompted to complete **"Sexual Orientation"** on the client's basic information screen as seen below.

You will also complete the following assessments:

Enrollments	Basic Client Demographics		
Services >	Birth Date:	02/02/2000 📖 🤎	
0	Client Age:	15	
📥 Referrals	Date of Birth Quality:*	Full DOB Reported	
Case Notes		 Approximate or Partial DOB Reported Client doesn't know 	
		Client refused	
Paused Workflows		O Data not collected	
	Ethnicity:*	Non-Hispanic/Latino 🗸 🤨	
	Race:*	Black or African American	
		Native Hawaiian or Other Pacific Islander	
		White Client doesn't know	
		Client refused	
		Data not collected	
	Gender:*	Male 🗸 🖷	
	Sexual Orientation:*	- SELECT -	
	Show Address and Contact Information:	Heterosexual Gay	
	Family Information - Use this section to collect data about a client's family. The Fi		
	family.	Bisexual	
	Family:	Questioning / Unsure Don't Know	
		Refused	
	Relationship to Head of Household:*	Data not collected	
	Begin Date:	09/23/2015	1
		4 Previous 🔣 Finish	

Basic Center Project (BCP) Enrollment Status Assessment – This is only required for emergency housing and prevention RHY projects. Complete the required data and click **"Save"** to continue.

RHY Program Data Intake	2/2/2000 24/	848
	Intake	🗧 🖊 RHY BPC Status Assessment 🔤 😨 👔 🗖
CASE MANAGEMENT	и х	To determine the number of homeless persons eligible for FYSB in RHY BCP-funded emergency shelter projects.
Client Dashboard	Basic Client Information	
/* Edit Client	Family Members	RHY - BCP - Status - Collect once at or before each project exit.
Carly Members	Program Enrollment	Date Status Determined * 92/22/2015 Enroll Status* Yes ✓
Assessments >	🗴 Jake Neverland 🗠 🗠	
C Enrollments	Assessment A	
🔮 Services 📏	BCP Status	

Employment Assessment – The built in logic will require additional information depending on the client's employment status. Click **"Save"** to continue.

	6		Intake	C Universal Data Assessment 🕨 RPV BPC Status Assessment 🕨 🦯 Employment Assessment
CASE MANAGEMENT			II X	Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week prior to assessment, and select the tenure of the employment position. If the client is not employed, indicate if the client is looking for work.
1	Edit Client	>	Family Members	Assessment Active
20	Family Members	>	Program Enrollment	Assessment Date:* 09/14/2015
	Assessments		Neverland, Jake	Employed?* Yes Type of Employment* Seasonal / sporadic (including day labor)
0	Enrollments		Assessment A	Hours Worked In Last Week: * 10.00
2	Services		 BCP Status 	Employment Tenure:* Temporary V
3	Services	L	 Barriers / Special Needs 	
	Case Notes		Employment	

Health Assessment - Complete the required data and click "Save" to continue.

	C RHY Program Data Intake	Intake	н х	😧 Employment Assessment) Child Education Assessment) 📥 Health Assessment . Select the appropriate pregamy status. If the client is pregnant, you will need to record the due date.
_	Client Dashboard	 Basic Client Information Family Mem 		Default Client's Last Assessment w
2	Family Members	 Program En Jake Neverl 	ollment	Assessment Active Assessment Date:* 09/14/2015
	Enrollments	Assessment	^	Dental Health Status: Par
2	Services >	 BCP Status 		Mental Health Status: * Good

Commercial Sexual Exploitation and Commercial Labor Exploitation Assessments – These assessments are new requirements for the RHY project. Complete all the fields with a red asterisk (*) to continue in the workflow.

	Intake	📀 + Child Education Assessment 🕨 Health Assessment 🕨 🦯 RHY Entry A	ssessment		a 🖉 🕼 🕄 🚍				
CASE MANAGEMENT	н х	The RHY entry assessment is used to collect project entry data for RHY funded	projects.		^				
실 Client Dashboard	Basic Client Information				I				
🔑 Edit Client 📏	Family Members	Assessment Active							
Carly Members	 Program Enrollment 	Assessment Date:* Referral Source:*		~					
Assessments >	Neverland, Jake		Self-Referral	v					
Enrollments	Assessment	Commercial Sexual Exploitation							
Services >	 BCP Status 	Ever received anything in exchange for sex (e.g. money, food, drugs,* shelter) :	Yes 🗸						
🛃 Referrals	 Barriers / Special Needs 	In the last three months:*							
Case Notes	 Employment 	How many times:*							
Case Notes	Child Education	Ever made/persuaded to have sex in exchange for something:*							
Paused Workflows	T	in the last three months:* Yes 💙							
	T	Commercial Labor Exploitation							
	RHY Entry Assessment Formerly Ward Of	Ever afraid to quit/leave work due to threats of violence to yourself,* family, or friends:	Yes 🗸 🖤	✓ ●					
		Ever promised work where work or payment different than you* expected:	162						
		Felt forced, pressured or tricked into continuing the job:*							
		In the last 3 months:*	Yes 🗸 🖤						
		Critical Issue	Status* 🔺	Incarcerated Parent Type 🗢					
		Household Dynamics	Yes V	interested ratent type					
		Sexual Orientation/Gender Identity - Youth	No 🗸						
		Sexual Orientation/Gender Identity - Family member	No 🗸						
		Housing Issues – Youth	No 🗸						
		Housing Issues - Family member	Yes 🗸						
		School or Educational Issues - Youth	No		~				
					Save Vo Changes				

Critical Issue(s) Assessment – The built in logic may require additional data depending on the client's responses to the questions. To move forward on this assessment, click all of the "**Critical Issues**" and change the default "**Status**" to "**Yes**" for those the client reports as critical issues. Click "**Save**" to continue the workflow.

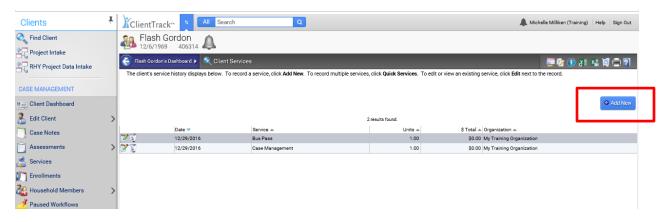
	1	ntake	۲									
CASE MANAGEMENT		II X		Ever promised work where work or payment different than you* expected:	Yes		~ 0					
🎉 Client Dashboard	11	 Basic Client Information 		Felt forced, pressured or tricked into continuing the job:*	Yes		v 🤨					
Edit Client	>	Family Members		In the last 3 months:*	Yes		v 0					
Samily Members	>	Program Enrollment	R	Critical Issue A		Status* 🔺		Incarcerated Parent Type 🚓				
Assessments	>	Neverland, Jake	-	Household Dynamics		Yes	~	incarcerated Parent Type =				
Enrollments	١.	1.	2	Sexual Orientation/Gender Identity - Youth		No	~					
Enrollments	11	T	1	Sexual Orientation/Gender Identity - Family member		No	~					
Services	>	 BCP Status 	1	Housing Issues - Youth		No	~					
Referrals	1.	 Barriers / Special 	2	Housing Issues - Family member		Yes	~					
S Referrais		Needs	1	School or Educational Issues - Youth		No	~					
Case Notes	11	 Employment 	2	School or Educational Issues - Family member		No	~					
Paused Workflows	1.	 Child Education 	2	Unemployment - Youth		No	~					
H ₀ Hudded Horkhows		Health	N N	Unemployment - Family member Mental Health Issues – Youth		Yes No	× v					
	ι.	RHY Entry Assessment	1000	Mental Health Issues - Family member		Yes	¥					
		T ·	2	Health Issues - Youth		No	~					
	11	Formerly Ward Of	2	Health Issues - Family member		No	~					
			1	Physical Disability - Youth		No	~					
			2	Physical Disability - Family member		No	~					
			1	Mental Disability - Youth		No	~					
			V	Mental Disability - Family member		No	~					
			1	Abuse and Neglect – Youth		No	~					
			1	Abuse and Neglect - Family member		No	~					
			2	Alcohol or other drug abuse - Youth		No	~					
			2	Alcohol or other drug abuse - Family member		No	~					
			1	Insufficient Income to support youth - Family member		No	~					
			2	Active Military Parent - Family member		No	~					
			1	Incarcerated Parent of Youth		No	~					
									Save Vo Changes			

Formerly Ward Of Assessment – Complete all of the required data to move forward in the workflow. Be sure to check both **"Systems"** and change the default status of **"Formerly Ward Of"** to **"Yes"** if the client reports being a ward of that system. Click **"Save"** to continue.

		1	ntake	¢	Health Assessment 🕨 RHY Entry Assessment 🕨 🕂 Sy	stem Use				🔜 🕼 🕕 🗐 🗐	
CASE MANAGEMENT II ×					Assessment Active						
٢	Client Dashboard	ľ	Basic Client Information		Asse	Assessment Date:* 09/14/2015					
1	Edit Client >	ŀ	Family Members		System A	Formerly a Ward Of:* 🔺		Number of Years 🔺	Number of Months (1-11) +		
4	Family Members	1	Program Enrollment	2	Child Welfare/Foster Care Agency	Yes	~	3 to 5 or more years 🛩		ø.	
	Assessments	1	Jake Neverland	2	Juvenile Justice System	No	~			<i>d</i> .	
C	Enrollments	k	Assessment								
2	Services >	1	 BCP Status 								
	Services >	ľ	 Barriers / Special Needs 								
	Case Notes	ŀ	 Employment 								
	Paused Workflows	k	 Child Education 								
	a	k	Health								
			RHY Entry Assessment								
		•	Formerly Ward Of								

ADDING SERVICES

Currently, HOPWA, RRH, RHY and PATH projects are required to enter services into the HMIS. If you operate a HOPWA, RRH, RHY or PATH project, after completing an enrollment for a client, you can document services associated with the project 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.



To document a new service, click on **"Add New."** You will see the Services home screen where you select the enrollment associated with the service and the service provided. You can also enter units (1.00 unit = one hour of case management or a bus pass) to track costs. The comments section can be used for reminders; however, this is not the area to write case notes. Case Notes will be covered later in the manual. Please note that services can be tailored to your organization's needs. If a service does not appear in your agency's options, contact the help desk to request that it be added.

Clients	Ŧ	🖁 ClientTrack 🖷 📑 🗖	All Searc	:h	Q				A Miche	lle Milliken (Training) Help Sign Out
Sind Client		Flash Gordon								
RHY Project Data Intake		Flash Gordon's Dashboard Client Services Chromotopy Client Services Chromotopy Client Services Client Service Client Service Client Service Client Service Client Serv								a 🖗 🕼 🕄 🖨 🔊
CASE MANAGEMENT		Fa	amily Incom	e: 🗋						
Edit Client	>	-		Family Income \$874.00	Family Members 2	Poverty Level \$1,335.00	% of Poverty 65.47 %			
Case Notes	>			t:* My Training		CoC - PSH V			_	
🍰 Services			Service Dat Unit						Location:	fy Training Location ∨
Household Members	>		Unit Valu Tota	e:* \$0.00						
4 Paused Workflows		User Performing	the Servic	e: Michelle Mi	•		1			
			Comment Restrictio	or Service	o Organization o MOU/InfoRelease	0				

When you are finished documenting a service, click on the "**Save**" button and you will be taken back to the Services home screen where you can add another service, edit or delete a service you created.

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.

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.*

Clients	Ŧ	ClientTrack™	s All	Search	٩		🜲 Train33 (Testing) 🛛 Help 🔹 Sign Out
Sind Client		Flash Goi 12/6/1969	rdan 🔔				
RHY Program Data Intake			Case Notes				XI XI 🖬 🖬 🚍
Client Dashboard						lew Case Note . To view or edit a c , and then click Print Selected .	ease note, click Edit Case Note next to the record.
CASE MANAGEMENT							Add New Case Note Print Selected
Lient Dashboard					No reco	ords found.	
🚴 Edit Client	>	Date 😎	Regarding 🛋		User 🔺	Organization 🔺	Print 🗌 🔺
Case Notes							

Clients	ClientTrack [™] All Search Q All Search Sign Out
Find Client	Mia Fake 1/26/1987 Female
RHY Program Data Intake	Client Case Notes > Case Note with Services
Client Dashboard	editor field. If Read Only is checked, no one will be able to delete or edit the case note unless the read only checkbox has been unchecked. Record services associated with this case note using the lower portion of the form.
CASE MANAGEMENT	Entry Date: * 02/02/2016 🗐 User: * Train33
Lient Dashboard	Regarding:* Transportation to Work Issue
Edit Client	Note Type: - SELECT - V
Case Notes	Template: Option not in the list V
Assessments	Case Note
Referrals	Client Name: Mia Fake
Services	This is a test case note. Had this been a real case note, it would include the who, what, why, when and where of the topic in the "Regarding" field.
Enrollments	Please limit the use of acronyms so others within your organization are able to step in and assist the client. In addition, please remember that clients can request a copy of their file at any time.

Once a case note is created, it will appear in a list of case notes on the Case Notes home screen. You can use the blue play button beside the case note to:

- View Case Note
- Edit Case Note
- Delete Case Note (A deleted case note can be restored by going to the Recycle Bin in the upper right hand corner of the screen.)

Find Client	Mia Fake	ale 🔔										
RHY Program Data Intake	The client's case note histor	★ Client Case Notes Kill Xill voltage Kill voltage Kill Xill voltage Kill Voltage Kille										
CASE MANAGEMENT			2 results found	L	🚽 Add New Case N	Note Print Selected						
Redit Client	Date 🔝	Regarding 🔺	User 🛋	Organization 🔺		Print 🗌 🔺						
	0 10/21/2015	Face to Face Contact	Train17	My Training Organization								
Case Notes	View Case Note	Intake	Train17	My Training Organization								
Assessments	Edit Case Note			1.								

You can also select case notes to print by clicking on the **"Print"** box located in the far column and clicking on the **"Print Selected"** button beside the **"Add New"** button. This will print all of the "checked" case notes.

UPDATE/ANNUAL ASSESSMENT

For clients who spend longer periods of time in your project 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 project for a year or longer, and some projects like RRH require more frequent assessments so be sure to check your project 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 project enrollment;
- Select "Update/Annual Assessment" from the drop down list; and
- Complete the required assessments prompted by the workflow and save as you go.

Clients	Ŧ	ClientTrack [™] 5 All Se	arch		Q				A Michelle Milliken (Training)	Help	Sign Out
Find Client		Flash Gordon									
RHY Project Intake		🗧 🗙 Flash Gordon's Dashboard									Øz 📮
	-	Flash Gordon's Information									
ASE MANAGEMENT		Name:	Gordon, Flash		Birth Date:	12/6/1969				Age	47
Client Dashboard		Gender:	Male		Disabling Condition:	Yes				Veteran:	: Yes
Edit Client	>										
Case Notes		Ethnicity:	Hispanic/Latin	0	Race:	American Indian or Ala	aska Native, Asian, Black or A	frican American			
Assessments	>	Flash's Enrollments									
Services						1 result	found.				
Enrollments		Enrollment Description		Case Members	Enroll Date	Exit Date	Organization	Last A Compl	eted E	nroll ID	Exit
Household Members	>	⊤ Current									
	ŕ	My Training Org CoC - PSH		2	12/29/2016		My Training Organization	12/29/	2016	10657	
Paused Workflows		Edit Enrollment Workflow									
		C 🔄 Add Family Member									
		Niew Case Members				1 result	found.				
				Be	gin Date	Status	End Date	Enrollment			
		🔄 🛺 Update/Annual Assessment			/29/2016	Active		My Training Org Col	C - PSH		
		🞽 🛶 Link Assessments									
		F 🙀 Associated Assessments									
		🖳 Exit the Enrollment				3 results	a found.				
		Review Entry Assessments		Service			Units	\$ Total Organization			
		M		Case Manage	ment		1.00	\$0.00 My Training Organ	nization		
		👷 🗙 Delete Enrollment		Rue Pass			1.00	\$0.00 My Training Organ	nization		

The first screen you will be taken to will review the household members and the enrollment. Click **"Save"** or **"No Changes"** in the bottom right-hand corner to continue in the workflow.

Clients	ClientTrack	TH 5	All Search			Q		-	Train33 (Testing)	Help	Sign Out
Find Client	Flash G	ordan _{Male}									
Project Entry	Annual		Flash Gordan's D			HUD Program Enro					2
Client Dashboard	Assessment	II ×	Select the Program clients you are enro		olling th	e client into. ClientTra	ack will display a list of client	s in the clie	ent's family. Please	select all	the
CASE MANAGEMENT	Enrollment				Pro	gram:* Training -	CoC (PH)				
Client Dashboard				assistance	and who		ousehold is a single individu dwelling unit (or, for persons				
🚪 Edit Client	>		one avening and i die	y were nou	Jeay.						
Case Notes			🗌 Name 🔺	Gender 📥	Age 🔺	Project Entry Date 🛋	Case Manager 🕘 🔺		Relationship to Head of Househo	d* 🔺	
Assessments	>		🗹 Gordan, Flash	Male	46	10/01/2015 🗖	Train33		Self		~
Referrals	>		America, Captain	Male	10	10/01/2015 🛅	Train33	4	Other Non-Fan	nily	~
Services	>										
Enrollments											
Content of the second Hembers	>										
									Save	🖌 No C	Changes

Select the option to complete a "New Assessment" and then select the appropriate Type of Assessment. For an Annual Assessment to be recognized on an Annual Performance Report it must be completed within 30 before or after the yearly anniversary of the client's enrollment.

Clients	Ŧ	ClientTrack™	All Search Q	Michelle Milliken (Training) Help	Sign Out
C Find Client		Flash Gordon 12/6/1969 4063	1 314 🔔		
RHY Project Data Intake		Assessment For Enrollment	New or Update Existing for this Client are you		
CASE MANAGEMENT		II ×	New Assessment		
📰 Client Dashboard	>	Gordon, Flash	Update Existing		
	I			A	

Clients	IclientTrack [™]	s All	Search Q	🌲 Michelle Milliken (Training) Help Sign Out
🔍 Find Client	Flash Gordo 12/6/1969 40	on		
Project Intake	12/0/1909 40			
RHY Project Data Intake	Assessment For	(C)	Type of Assessment	
	Enrollment	×	During Program Enrollment	1
CASE MANAGEMENT	 Enrollment 		During Program Enrollment	
Client Dashboard	Gordon, Flash	~	Annual	
🚴 Edit Client	> 👌 New or Update Existing	g .		

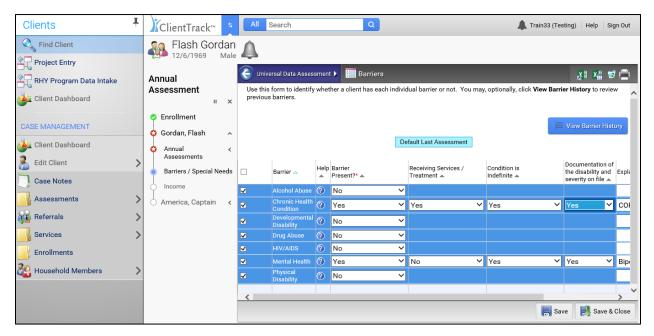
HMIS Universal Data Assessment

You will then review the head of household's Insurance information. You can use the Default Last Insurance Status and then review and confirm the information is still correct.

 Edit Client Case Notes Assessments Services Enrollments 	>	 New or Update Existing Type of Assessment During Program Enrollment Assessments America, Captain < 	Client Location - Sele	Assessor.* Mic Program: My	ng Program Enrol helle Milliken Training Org CoC -	PSH V	t entry. Client location will be defaulted to the program's
Household Members	>		CoC within a workflow		500 - Atlanta CoC	~	
				Covered by Health Insurance: Tres	Default Last In	Reason No 🖤 👝	Other Converage
				Private	- SELECT V		
				Private - Employer	- SELECT V		
				Private - Individual	- SELECT V		
				Medicare	- SELECT V		
				Medicaid	- SELECT - Y		
				State Children's Health Insurance Program S-CHIP	- SELECT V		
				Military Insurance	Yes 🗸		di.
				State Funded	- SELECT 🗸	- SELECT V	
				Combined Children's Health Insurance / Medicaid Progra	m - SELECT 🗸	- SELECT V	
				Indian Health Service (IHS)	- SELECT Y	- SELECT V	
				Other Public	- SELECT 🗸	- SELECT V	

HMIS Barriers Assessment

You can use the **"Default Last Assessment**" to populate the Barriers previously entered for the Client. Review the HMIS Barriers and make any changes necessary. Click **"Save & Close"** to move forward in the workflow.



Financial Assessment

Review the Financial information for the head of household and document any changes to the household income. You can use the **"Default Last Assessment"** button to populate the information that was entered at entry or the latest Financial Assessment. Be sure to scroll down to complete Non-Cash Benefits and click **"Save and Close"** when finished. Again, when using the Default Last Assessment feature, you must verify and confirm the data used is still accurate.

Clients	Ŧ	ClientTrack™ 5	All	Search	Q			Train3	3 (Testing) Help Sig	gn Out
C Find Client		Flash Gordan								
Project Entry		73 12/6/1969 Male			_					_
RHY Program Data Intake		Annual	G Un	iversal Data Assessment 🕨	🕂 Income	and Sources, I	Non-Cash Benefits		.¥≣	
Client Dashboard		Assessment		Assess	ment Date:*	02/08/2016				^
		Enrollment		Income from A			v 0			
CASE MANAGEMENT		🗯 Gordan, Flash	No	on-Cash Benefits from A	-	Yes				
Lient Dashboard		🗘 Annual 🗸			Expenses:	- SELECT -	∨ [⊚]			
Edit Client	>	Assessments	Income							-1
Case Notes	,	 Barriers / Special Needs 	lineenite							-
		 Income 		Type 🛆			Description 🔺		Monthi Amount 4	
Assessments	>	🖒 America, Captain \prec	✓	Earned Income (i.e., employ	ment income)		Wendy's Part time		\$300.00	
Referrals	>			Unemployment Insurance						
Services	>			Supplemental Security Inco	me (SSI)					
Enrollments				Social Security Disability In	come (SSDI)		Income from Captain Ame	ic	\$674.00	£G1
<u> </u>				Veteran's Disability Paymer						
Household Members	>			Private Disability Insurance						
				Worker's Compensation					407100	~
					Count/ I otal	Monthly Income:		2	\$974.00	_
									🛃 Save and	Close

Clients	+	ClientTrack™	5	All	Search	Q		🜲 Train33 (Testing)	Help	Sign Out
Find Client		Flash Gord	lan _{Male}							
RHY Program Data Intake		Annual Assessment		🥃 Ur	niversal Data Assessment 🕨	+ Income and Sources, Non-C	ash Benefits			M 🖨
Client Dashboard		Ш	×		Туре 📥	Descri	ption 🔺		Mor Amou	nthly nt ▲
CASE MANAGEMENT		 Enrollment 								
Lient Dashboard		 Gordan, Flash Annual 	<pre>^</pre>	Non-Cas	sh Benefits					
Edit Client	>	Assessments Barriers / Special Nee			Туре 🛆		Description 🔺		Mc Amou	onthly int 🔺
Case Notes		Income				tance Program (SNAP) (Food Stamps)				<i>4</i> 51
Assessments	>	America, Captain			(WIC)	on Program for Women, Infants, and Chil	dren			
Referrals	>				TANF Child Care Services TANF Transportation Service	S				
Services	>				Other TANF-funded Services					
Enrollments				_		Other Ongoing Rental Assistance	CoC funded ho	using		\$ 21
Y	,			_	Other Source Temporary rental assistance					
Household Members					remporary remainassistance	Count/Total Monthly Inco	ome:	2	Ś	0.00
										~
									📕 Save a	ind Close

HMIS Universal Data Assessment for Child

After completing all of the updated assessments for the head of household, you will be prompted through the assessments for all enrolled household members. The adult assessments will look like the head of household's assessments. The Update/Annual Assessment will look differently for children.

Edit Client	>	America, Captain			Assessment Date:* 12/29	9/2016 🛅								
Case Notes		New or Update Existing			Age at Assessment: 11									
		T '			Assessment Type:* Durin	g Program Enroll	ment 🗸							
Assessments	>	 Type of Assessment 			Assessor:* Miche	elle Milliken								
Services		 During Program Enrollment 			Program: My Tr	PSH V								
T Enrollments		Assessments	Health Insurance	h Insurance - Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.										
Household Members	>			Default Last insurance Status Covered by Health Insurance:* Yes										
🔮 Paused Workflows					Covered by Health Insurance."	•								
					Type 🛋	Status* 🔺	Reason No 🤨 🔺	Other Converage 📥						
				F	Private	- SELECT 🗸	SELECT V							
				F	Private - Employer	- SELECT 🗸	SELECT V							
				F	Private - Individual	SELECT 🗸	SELECT V							
				ſ	Medicare	- SELECT 🗸	SELECT V							
					Medicaid	Yes 🗸		đ.,						
				5	State Children's Health Insurance Program S-CHIP	- SELECT 🗸	SELECT 🗸							
				ſ	Military Insurance	- SELECT - 🗸	SELECT V							
				1	State Funded	- SELECT 🗸	SELECT 🗸							
				(Combined Children's Health Insurance / Medicaid Program	- SELECT 🗸	- SELECT V							
				1	ndian Health Service (IHS)	- SELECT 🗸	SELECT V							
					Dther Public	- SELECT 🗸	SELECT V							
						strict to Organiza strict to MOU/Inf								

HMIS Barriers Assessment for Child

Complete the Barriers Assessment for the child. If no barriers are reported, click **"Save & Close"** to continue in the workflow.

Clients	Ŧ	Client	Frack™	, All	Search		Q				🜲 Train33 (Te	sting) Help	Sign O	ut
Sind Client		🔊 Cap	otain Ame	erica										
Project Entry		Annual Assessme		Un Use th	iversal Data Asses		t) Barriers ther a client has each indi	ividu	al barrier or not. You ma	y, optio	nally, click View Barr i	ar History to re		, II
CASE MANAGEMENT		 Enrollme Gordan, I America, 	Flash 🦂					Defa	ult Last Assessment			View Barrier H	listory	
Edit Client	>	Annual Assessm			Barrier 🛆		Barrier Present?* 🔺		Receiving Services / Treatment 🔺		tion is nite 🔺	Documentation the disability a severity on file	nd Ex	pla
Assessments	>	 Barriers, 	/ Special Need	s 🔽	Alcohol Abuse Chronic Health Condition	3		י י ו	Yes 🗸	Yes	~	Yes	≺ Et	oil
Referrals	>				Developmental Disability	3	No	~						
Services	>			☑	Drug Abuse			~						
Enrollments				⊻ ▼	HIV/AIDS Mental Health	2 2		✓ ✓						-
Household Members	>			 ✓ 	Dhusiaal									
				<									>	~
											📕 Sa	ve 📕 Sav	e & Clo	se

PROJECT 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 project 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 information prompted through the Exit workflow and save as you go.

Case Notes	í	Ethnicity: Hisp	anic/Latino	Race: Ame	rican Indian or Alas	ka Native, Asian, Black or	African American		
Assessments	>	Flash's Enrollments							<u>م</u>
Services					1 result fo	und.			
Enroliments		Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Asses Completed		Exit ID
Household Members	>	Current My Training Org CoC - PSH	2	12/29/2016		My Training Organization	12/29/201	6 10657	
4 Paused Workflows		Edit Enrollment Workflow							
		C Add Family Member			1 result fo	rund.			
		Update/Annual Assessment	Be	gin Date	Status	End Date	Enrollment		
		Link Assessments	12/	/29/2016	Active		My Training Org CoC - P	SH	
		F Associated Assessments							
		🖳 Exit the Enrollment			3 results fo	ound.			
		🖳 🖳 Review Entry Assessments	Service			Units	\$ Total Organization		
		📱 🗙 Delete Enrollment	Case Manage	ment		1.00	\$0.00 My Training Organizat	ion	
			Bus Pass			1.00	\$0.00 My Training Organizat	ion	

On the first screen of the exit workflow, you will be asked for the **"Exit Date," "Destination," "Exit Reason,"** and whether to **"End Case Assignment."** Please note that all fields with an **asterisk *** are required.

Clients	Ŧ	ClientTrack™	All Search Q All Search Sign C
Find Client		Flash Gordan	n A
Project Entry		HUD Program	Flash Gordan's Dashboard 🕨 🦯 Enrollment Exit
Client Dashboard		Exit	To exit the client from the Enrollment, enter the Exit Date and Destination.
CASE MANAGEMENT		Exit Enrollment Exit Assessments	Exit Date: * 02/08/2016 🗐 Destination: * Permanent housing for formerly homeless persons (such as: CoC project; or HUD legacy programs; or HC
Client Dashboard		-	Exit Completed Program
Ldit Client	>		Reason: Case Manager Assignment: Train33 9
Case Notes			End Case Assignment: 🗹 🖤
Assessments	>		
Referrals	>		
Enrollments	/		
Household Members	>		
			<
			se la companya de la

HMIS Universal Data at Exit

Complete the required information and click "Save" to continue.

Clients	Ŧ	ClientTrack™ 🚦	All	Search		Q					🜲 Train33 (Tes	iting) Help	Sign Ou	Jt
C Find Client		Flash Gordar	י \Lambda											
Project Entry		12/6/1969 Mai												
RHY Program Data Intake		HUD Program	C F	'lash Gordan's D	ashboard) Enro Assessme		02/08/2016		Assessmer	it		ď	🚔 ?	
Lient Dashboard		Exit			Age at Asse		46	1						^
		Exit Enrollment			Assessme	nt Type:*	Exit		~					
CASE MANAGEMENT		Exit Assessments			As		Train33							
Lient Dashboard					Р	rogram:*	Training - CoC	: (PH)	\sim					
Ldit Client	>			Insurance - Ple ice sources for		ther or not th	he client is cover	ed by hea	lth insurance	e. If so,	you will be able to	record healt	h	
Case Notes					Health Ins	urance:*	Yes	~]					
Assessments	>		?	Note on Ex status appr		f a client had	d an insurance s	ource but	no longer ha	s it. Ple	ase enter an end o	late and upd	ate the	
Referrals	>													
Services	>		+					Is						
Enrollments				Туре* 🔺				Primar	y Status* 🔺		Reason No 🥹 🔺			
Nousehold Members	>		$\sim \times$		dministration (\	'A) Medica		•	Active	~				
*				SELECT				Yes	SELEC	Γ Υ				
			<					Tes	·				>	~
													🛃 Sav	e

HMIS Barriers at Exit

You will be required to complete the HMIS Barriers Assessment at exit. The built in logic may create additional required fields. Select a barrier by clicking on the box beside it if a barrier is present at exit. If the client has no barriers, click on **"Save & Close"** in the lower right hand corner.

Clients	Ŧ	ClientTrack™ 🚦	All	Search		Q				🜲 Train33 (Tes	ting) Help	Sign Out
C Find Client		Flash Gordan	Â									
Project Entry		HUD Program Exit	Se this			rsal Data Assessment 🕨		Barriers	, optionally,	, click View Barri o	K∄ II X III Ar History to re	view
CASE MANAGEMENT		 Exit Enrollment Exit Assessments Barriers / Special Needs 				E	Det	fault Last Assessment		1	View Barrier H	listory
Edit Client	>	Income		Barrier 🛆		Barrier Present?* ▲		Receiving Services / Treatment 🔺	Condition i Indefinite	IS	Documentation the disability ar severity on file	nd Expla
Assessments	>		⊽	Alcohol Abuse Chronic Health Condition	<u> </u>		✓	Yes 🗸	Yes	~	Yes	✓ COI
Referrals	>			Developmental Disability	0	No	~					
Services	>		V				~					
Enrollments				HIV/AIDS			~	No. Y	N/		N -	× Bin
Household Members	>		✓ ✓	Mental Health Physical Disability			~ ~	No Y	Yes	~	Yes	✓ Bip
			<				_			F Sav	e 惧 Save	> Close

Financial Assessment at Exit

Complete the Financial information for the head of household at exit and document any changes to the household income. Be sure to scroll down to complete Non-Cash Benefits and click **"Save and Close"** when finished.

Clients	Ŧ	ClientTrack [™] 5	Al	Search	Q		🜲 Train33 (Testing) Help Sign Out
Find Client		Flash Gordan						
Project Entry		(a) 12/6/1969 Male			-			
RHY Program Data Intake		HUD Program	(E) •	Enrollment Exit	rersal Data Assessment D	come and Sources,	Non-Cash Benefits	XI 🚍
Client Dashboard		Exit	Ι.	Income fro Non-Cash Benefits fro	om Any Source:* Yes	♥♥♥♥		^
CASE MANAGEMENT		Exit Enrollment	'	Non-Cash benefits in	Expenses: - SELECT -			
		Exit Assessments						
Client Dashboard		 Barriers / Special Needs 	Incom	e				
👗 Edit Client	>	 Income 						
Case Notes				Туре 🛥		Description 🔺		Monthly Amount ▲
Assessments	>			Earned Income (i.e., er		Wendy's Part tin	ne	\$300.00
Referrals	>			Unemployment Insura Supplemental Security				
	1		V	Social Security Disabil		Income from Ca	ptain Americ	\$674.00 🔬
Services	>			Veteran's Disability Pa	ayment			
Enrollments				Private Disability Insu	rance			
Rousehold Members	>			Worker's Compensatio				
				Temporary Assistance	e for Needy Families (TANF)			
					Count/Total Monthly Incom	e:	2	\$974.00
								Save and Close
	_							
Clients	Ŧ	ClientTrack™ ⁵	Al	Search	Q		🜲 Train33 (Testing) Help Sign Out
Find Client		Flash Gordan	Â					
Project Entry		12/6/1969 Male		I	-			
RHY Program Data Intake		HUD Program	(« Enrollment Exit 🕨 Univ	rersal Data Assessment 🕨 🕂 In	come and Sources,	Non-Cash Benefits	XI 🚍
Client Dashboard		Exit		Type 🛆		Description 🔺		Monthly
		н х	<u> </u>	Туре 🕰		Description		Amount 🔺
CASE MANAGEMENT		Exit Enrollment						
		Exit Assessments ^	Non-C	ash Benefits				
Client Dashboard		 Barriers / Special Needs 						
Edit Client	>	Income		Туре 🔺		Descrip	tion 🔺	Monthly Amount 🔺
Case Notes			✓		Assistance Program (SNAP) (Food \$			<i>\$</i>
Assessments	>			(WIC)	lutrition Program for Women, Infants	s, and Children		
Referrals				TANF Child Care Service				
-				TANF Transportation Se				
Services	>			Other TANF-funded Ser	vices 1g, or Other Ongoing Rental Assistan	ice CoC f	unded housing	
Enrollments				Other Source	ing, an effect of going rental Assistan	0001	anaca nousing	
Household Members	>			Temporary rental assist	ance			
					Count/Total Mo	onthly Income:		2 \$0.00
								~

Exit Workflow for Child

Clients F	ClientTrack [™] [±] All Search Q
Find Client	Flash Gordan 🔔
RHY Program Data Intake	HUD Program Exit Do you want to exit? Do you want to exit America, Captain?
Client Dashboard	ıı × ♥ Exit Enrollment
CASE MANAGEMENT	 Exit Assessments < America, Captain ^
Ldit Client	Do you want to exit?
Case Notes	
Assessments	

After completing all of the exit assessments for the head of household, you will be prompted through the exit assessments for all enrolled household members. The adult exit assessments will look like the head of household's assessments. The exit assessments will look differently for children. The "**Destination**" is required for all household members being discharged from the project.

HMIS Universal Data Assessment at Exit for Child

Complete the required information on the HMIS Universal Data Assessment at exit for the child and click **"Save"** to continue.

	-		
Clients	Ŧ	∬ClientTrack™ 📫	All Search Q All Search I Sign Out
Sind Client		🔊 Captain Ame	
Project Entry			
RHY Program Data Intake		HUD Program	C / Enrollment Exit
Lient Dashboard		Exit	To exit the client from the Enrollment, enter the Exit Date and Destination .
		Exit Enrollment	Exit Date: * 02/08/2016 📠
CASE MANAGEMENT		Exit Assessments <	Destination:* Permanent housing for formerly homeless persons (such as: CoC project; or HUD legacy programs; or HOPW/
Client Dashboard		🗘 America, Captain \land	Exit Completed Program
🚴 Edit Client	>	Do you want to exit?	Reason:
Case Notes		Exit Enrollment	Case Manager Assignment: Train33 [®] End Case Assignment: 🗹 🔍
		Exit Assessments	
Assessments	>		
	_		Telefor Protocol Use 1 Also Ald
Clients		ClientTrack™	All Search Q Train33 (Testing) Help Sign Out
C Find Client		Captain Ame	ica 🔨
Project Entry		8/24/2005 Male	
RHY Program Data Intake		HUD Program	C / Universal Data Assessment
Client Dashboard		Exit	Age at Assessment: 10
		н х	Assessment Type:* Exit
CASE MANAGEMENT		Exit Enrollment	Assessor:* Train33
		🥏 Exit Assessments 🔍	Program:* Training - CoC (PH) 🗸
Client Dashboard		🗘 America, Captain \land	Health Insurance - Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.
👗 Edit Client	>	Do you want to exit?	
Case Notes		 Exit Enrollment 	Health Insurance: * Yes V
Assessments	>	Exit Assessments	Sopy Head of Family Insurance Sources
Referrals	>	Barriers / Special Needs	Note on Existing Sources - If a client had an insurance source but no longer has it. Please enter an end date and update the status appropriately.
Services	>		
Enrollments			+
/			Type* Primary Status* Reason No A
20			
Kousehold Members	>		Medicaid V Active V
Household Members	>		Yes
Kousehold Members	>		

HMIS Barriers Assessment at Exit for Child

Complete the Barriers Assessment for the child at exit. If no barriers are reported, click **"Save & Close"** to continue in the workflow.

Clients	Ŧ	ClientTrack™ 🗧	All	Search		Q				Train33 (Te	sting) Help S	ign Out
Find Client		Captain Amer	ica 🛕									
RHY Program Data Intake		HUD Program Exit	Unive Use this	ersal Data Asses			livid	ual barrier or not. You ma	y, optionally, clic	k View Barri	Kanan and a second sec	
Client Dashboard		Exit Enrollment Exit Assessments < America, Captain	previous	s barriers.			De	fault Last Assessment		3	View Barrier His	story
Edit Client	>	 Do you want to exit? Exit Enrollment 		Barrier 🛆		Barrier Present?* 🔺		Receiving Services / Treatment 🔺	Condition is Indefinite 🔺		Documentation of the disability and severity on file	Expla
Assessments	>	 Exit Assessments Barriers / Special Needs 	⊽ ⊽				✓	Yes 🗸	Yes	~	Yes 🗸	' Epil
Referrals	>			Developmental Disability	3	No	~					
Services	>		⊻	Drug Abuse HIV/AIDS			✓					
Enrollments			✓ ✓	Mental Health			× ✓					
Household Members	>			Physical Disability	3	No	~					
			<							F Sa	ve 📕 Save 8	A Close

Completing the Exit Workflow

When you have completed all exit assessment for all household members, you will be asked to finish the exit workflow. Click **"Finish"** to complete the discharge for your clients.

Find Client	Flash Gordan	
Project Entry	12/6/1969 Male	
RHY Program Data Intake	HUD Program	You're done!
Lient Dashboard	Exit	All required steps have been completed.
	Exit Enrollment	Finish Close the workflow
CASE MANAGEMENT	Exit Assessments <	
실 Client Dashboard	America Contain	

You will then return to the client dashboard

where you can see the project exit dates now as see below. If you have also selected **"End Case Assignment"** on the exit workflow, you will see that your status has changed to **"Inactive"** on the client dashboard under **"Case Manager Assignments."** If you forgot to click on the box beside **"End Case Assignment"** during the exit workflow, you can click on the little notepad beside your name under **"Case Manager Assignments"** to edit your status to **"Inactive"** to remove the discharged client from your case load.

Find Client	Flash 12/6/196	Gordan 9 _{Male}	Â										
RHY Program Data Intake	Flash Gord	lan's Dashbo	oard										
m_	Flash Gordan's	Information											
Client Dashboard		Name:	Gordan, Fla	ash Birth	h Date: 12/	/6/196	9			Client ID:	406849	Age:	46
CASE MANAGEMENT		Gender:	Male		sabling ndition: Yes	s				Veteran:	Yes		
실 Client Dashboard													
👗 Edit Client >		Ethnicity:	Hispanic/L	atino	Race: Am	nerican	Indian or Alaska Native	Asian, Black or African	American				
Case Notes	Flash's Enrollm	ents											4
Assessments >							1 result found.						
Referrals >	Enrollment Description	N	Case Aembers	Enroll Date	Exit Date		Enroll Assessment ID	Exit Assessment ID	Organization		Last Ass Complete		ıt
Services													
	Training - Co	oc (PH)	2 1	10/01/2015	02/08/2016	6	11297	11301	My Training Organi	zation	02/08/20	16	

Unique Project Requirements at Exit

There are variations in data requirements for different project exits. Below are screenshots of the unique discharge requirements during the exit workflow for the following projects:

- 1. PATH
- 2. HOPWA
- 3. RHY

1. PATH EXIT

For PATH clients being discharged, their **"Date of PATH Status Determined"** and their **PATH enrollment status** will be required during the exit workflow on the **"Enrollment Exit"** screen as seen below. This information should have been entered on the Update/Annual Assessment. The system will give you one last opportunity to add this information.

If no referrals were made or no case notes entered, click "Skip" to proceed in the workflow.

2. HOPWA EXIT

A completed Medical Assessment will be required at exit for HOPWA.

		Ι,	HUD Program	e	Enrollment Exit Universal Data Assessment Im Assistance Assessment				2 🕕 3 I 👫 🚍 💽					
CAS	E MANAGEMENT		Exit		The medical assistance assessment is primarily used to determine whether HIV positive clients are accessing medical assistance benefits for which they may be eligible. Medical assistance data is required for clients with HIV/ADS who are enrolled in a HOPWA-funded program.									
الحفي	Client Dashboard		II X											
1	Edit Client	>	Exit Assessments	Asse	essment Active									
ا 💒	Family Members	>	Barriers / Special Needs		Assessment Date:* 09/26/2015 🛅									
<u>,</u>	Assessments	>	 Medical Assistance 		Medical Assistance Type 🛎	Status" 🔺		Reason No (if applicable) 🛎						
	Enrollments		T-Cell Count/Viral Load	2	Receiving Public HIV/AIDS Medical Assistance	Yes	×							
2	Services	>	Income	2	Receiving AIDS Drug Assistance Program (ADAP)	Yes	×		¢.,					
	Referrals		Education											
	Case Notes		Housing Assessment at Exit											

T-Cell Count and Viral Load data will also be required at exit for the client when being discharged from HOPWA.

A housing assessment will be required at exit for HOPWA clients as seen below.



3. RHY EXIT

In addition to the other exit assessments, RHY clients will complete the following exit assessments:

Basic Center Plan Enrollment Status Assessment – Complete the required data and click **"Save"** to continue.

Employment Assessment – The built in logic will require additional information depending on the client's employment status. Click **"Save"** to continue.

Clients	ClientTrack [™]	All Search Q	Autumn Gale (Training)	Help Sign Out
Find Client	Neverland, Ja	ke 🔔		
	HUD Program Exit	📀 * Universiti Dista Assessment >> RHY BPO Status Assessment >> Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week prior to assessment, and select the tenure of		i) 🗿 💼 💽
Client Dashboard	Exit Exit Enrollment	employed, indicate if the client is looking for work. Default Client's Last Assessment 4		
Family Members	 Exit Assessments ^ BCP Status 	Assessment Active Assessment Date:* 09/26/2015		
Assessments	Barriers / Special Needs Employment Health	Employed?* Ves V Type of Employment * Full-Time V		
Services >	RHY Exit Assessment	Hours Worked In Last Week-* 40.00 Employment Tenure:* Permanent V		
Case Notes				

Health Assessment – Complete the required fields and click "Save" to continue in the workflow.

Project Completion and Actions Assessment – The built in logic will require additional information depending on the client's responses. To move forward on this assessment, click all of the **"Actions"** and change the default **"Action Status"** to **"Yes"** for those follow up items. Click **"Save"** to complete the workflow.

	н	UD Program	🗲 + Employment Assessment 🕨 Health Assessment 🕨 🕂 RHY Exit Assessment	2 🖓 🕕 🗊 🖨 🛐
CASE MANAGEMENT		xit "×	RHY Exit Assessment	
Client Dashboard	١,	Exit Enrollment	Assessment Active	
/ Edit Client >	6	Exit Assessments	Assessment Date: * 09/26/2015	
Caraly Members	4	BCP Status	Project Completion Status:* Completed project V	
Assessments >		Barriers / Special Needs	Family Reunification Achieved:* No 🗸	
		Employment	9 results found.	
		Health		Action Status* 🔺
Services	11	RHY Exit Assessment		Yes 🗸 🔍
📇 Referrals	17	ATT LAT HUBBLING	Advise about and/or referal to appropriate mainstream assistance programs meters and a statement of the statement of	Yes V
Case Notes			Placement in appropriate, permanent, stable housing (not a sheller) Due to unavoidable circumstances or scarcities of appropriate housing, the youth must be transported or accompanied to a temporary shelter	Yes V
				Yes V
Paused Workflows			A courseway A course of further follow-up treatment or service	Yes V
			A follow as or remain source or the second secon	Yes V
			A hose reprint and a many point and a many point read whether and resources	Yes Yes
				No Y

SUBMITTING AN ISSUE OR REQUEST ASSISTANCE

If you need assistance logging into the HMIS, please email the HMIS Support Staff at

<u>GAHMISsupport@dca.ga.gov</u>. 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.

Clients	Ŧ	ClientTrack 🐃 🐴 🔼	Search	٩	🔔 GABOSTrain	01 (Training)	Help S	ign Out
Kind Client		Charli Test				Г		
Project Intake		Charli Test's Dashboard				<u>s</u> t		
		Charli Test's Information		and a second				-
CASE MANAGEMENT	_	Gender:	Test, Charli	Birth Date: Disabling	12/6/1969		Age: Veteran:	47
Client Dashboard	>		Female	Condition:	Yes			Yes
Case Notes	Í	Ethnicity:	Non-Hispanic/Latino	Race:	Asian, Black or African American, Native Hawaiian or Other Pacific Islander			
Assessments	>	Charli's Enrollments						4

Select the "Report an Issue" option from the menu.

Launo	Adian, black of Amean A	anienoan, ra
	Help X	
	Report an issue There is a problem on the current page.	nd.
	 Ask a question I have a question or request about the current page. 	
	Make a suggestion I have an idea on how to improve the current page.	6
	View the documentation	
	➔ Watch a video	nd.
ance (Keyboard Shortcuts View documentation on Keyboard Shortcuts used for accessibility 	
	About ClientTrack	

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.

Case Notes		Computery Non-Hispanic/Latino nauce Asian Black or African American Native – T
Assessments	>	Charli's Enrollments Enter a summary of your issue*
Services		The summary helps to quickly identify your issue when you're referring back to it Ister: Description Test Issue Submission
Nousehold Members		v Current
waite in the second members		My Training Org SSVF - RRH Please describe the issue
4 Paused Workflows		My Training Org ESG - Street Outreach Please enter any details that might help describe the issue or might help in solving it.
		v Previous
		My Training Org CoC - PSH ONLY use the Client ID Number when submitting an issue.
		Charli's Services When submitting an issue related to Reports, always include the name of the report, the program/grant for which you are running the report and the date parameters of the report.
		Date Se
		72 12/01/2016 SS
		2 11/30/2016 Co
		Attach a file or screenshot View Debug Information
		How can we reach you?
		Email Address* GABOStrain01@fake.com
		Phone Number* 555-5555
		Submit Cancel

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.

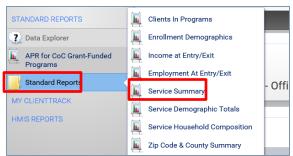
Basic Reports

SERVICE SUMMARY REPORT

The Service Summary Report is a report of the services your agency has provided for clients enrolled in a specific project. You can run a Service Summary Report a variety of ways to extract specific service information from client records, for example services rendered in the Month of December or Case Management Services provided for the year, etc. Most often the Service Summary Report is used to submit for reimbursement.

To Run a Service Summary Report:

- Click on "Reports" found in the list of options in the upper left-hand corner of your User Dashboard, just below "My ClientTrack."
- Hover over the "Service Reports" folder found in the list of links on the left-hand side of the screen. Another list of reports should appear as you hover on the "Service Reports" folder.
 STANDARD REPORTS
 Clients In Programs
 Clients In Programs
 Clients In Programs
 Clients In Programs
- Hover on the **"Service Summary Reports"** link that appears first in the list of "Service Reports."
- Click on **"Service Summary"** link that appears first in the list of "Service Summary Reports" after hovering over it.



- Set up your report parameters by: (*Please note that all fields with an asterisk * are required fields*)
- **Completing the date range** There are a couple of options for setting the date range. You can select from the **"Predefined Date Range,"** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **"Between."** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2015 and 12/31/2015. This will give you all of the clients in your project for the entire year of 2015.
- Filtering by "Projects" Select the "Project" you want to run a Service Summary for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a project. You can run multiple projects on the same report. Simply select more than one "Project" by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.
- Selecting "Grants" Select the "Grant" you want to run the report for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. However, your grant options will be dictated by the "Project(s)" you selected in the "Filter by Project(s)" box. If more than one grant appears, simply select more than one "Grant" by clicking on the name in the box. To deselect one, simply click on it again and you will see the green check mark disappear.

🗧 🇲 🛨 🖪 Service Summary Report	<u>_</u> 7
Predefined Date Range: -	SELECT V
Service Date Between:* 0	/01/2016 🗐 and 01/31/2016 🗐
Organization(s) - Indicate which organizations should be included in the report by sele authorized to view.	cting each organization separately, or click the 🥪 icon to select all. Note: The list only shows organizations you are
Organization(s):* 🏼 🌱 My Tra	ining Organization 👘 🚀
Program(s) - Check the box to limit report results by selected programs. When checke included in the report by selecting each program separately, or click the <i>d</i> icon to select	I, the list displays programs that belong to the organizations you selected above. Indicate which programs should be ct all.
Trainin Trainin Trainin ✔ Trainin Trainin	yy Program(s) ig - CoC (TH) ig - ESG (RRH) ig - PATH (SO) ig - RHY (BCP-ES) ig - RHY (SO) ig - RHY (TLP)
Grant(s) - Check the box to limit report results by selected grants. When checked, the report by selecting each grant separately, or click the vicin to select all.	st displays grants that belong to the organizations you selected above. Indicate which grants should be included in the
	y Grant(s) g - RHY (BCP-ES)
	👍 Report 🖉 Schedule Report 🗙 Cancel

- Filtering by Services, User(s), Housing Status, Results by Age, State(s), Counties, Zip Code(s) and more Select a variety of parameters to extract more specific service data from clients your organization has served. Most of these selections will allow you to select more than one option in the box. Again, simply click on the option in the box and a green check mark will appear. To unselect an option, click on it again and you will see the green check mark disappear.
- Click on the **"Report"** button found in the bottom right-hand corner of the screen. This will begin

🧲 🛨 🖪 Service Summary Report		1	runnir	ng your	repo	rt. Yo	u shoi	uld see	your	repor	t
Gervices - Select the specific services for the report, or leave the field bla selected above.	ces. NC										
Services	Filter by Services	6	export	t your r	epor	t to a	pdf fil	e for e	mail		
Jser(s) - Check the box to limit report results by selected users. When c by selecting each user separately, or click the <i>ৠ</i> icon to select all.	necked, the list displays users th			nission			<u>^</u>	0 0		0	he
User(s)	∃ Filter by User(s)			on in t	<u>^</u>	per ri	ight-h	and co	rner o	f the	
Housing Status - You may filter the results by clients with specific housi	ng statuses.	1	report	: windo	W.						
Housing Status	Filter by Housing Stat	tus									
Client Age Range - Identify whether the results should be filtered by an a	ge range.										
Filter Results by Age	: 🗆 🥹										
State, Counties & Zip Codes - Select clients' state(s), county(ies) and/or Organization(s) selected above.		Nex : 🛃 -	۵ 🖨								
State(s Counties Zip Code(s	Grants: Training	ning Organiza g - RHY (BCP g - RHY (BCP	-ES)								
	Service \$	Service Entries \$	Units \$	Total Value ≎	Undup. Clients \$	Families \$	Children in Families	Adults in ≎ Families ≎	Seniors in Families	Total Individua in ≎ Families	
	RHY - Basic Support Services	1	2.00	\$50.00	1		1	2	0	0	:
	RHY - Dental Care	1	1.00	\$230.00	1		1	2	0	0	1
	RHY - Life Skills Training	1	1.00				1		0	0	1
	RHY - Support Group	1	1.00				1	-	0	0	
	Duplicated Total	4 Service	5.00	\$330.00	4 Undup.		4 Children ir	8 Adults in	0 Seniors in	0 Total	le
	Undunlicated Totals	Entries 4	Units	Total Value	Clients	Families	Families	Families	Families	in Familie	
	Unduplicated Totals	4	5.00	\$330.00	2	2		+ 0		U	4

ANNUAL PERFORMANCE REPORT (APR)

Quick Reference Guide for the Annual Performance Report (APR)

The APR is a comprehensive report of your project – who you served and how you served them. It is

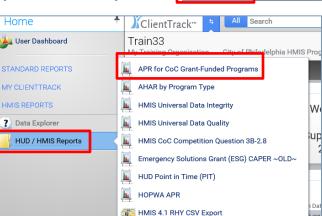
recommended that you run an APR often throughout the year to track missing data so that your report is complete when it is time for the annual submission. Here are quick steps to running the report and cleaning up missing data.

<u>To Run an APR</u>

- Click on **"Reports"** found under "My ClientTrack" in the upper left-hand corner of your user dashboard.
- Hover on the **"HMIS Reports" folder** found in the list of links in the upper left-hand corner of the screen. A list of reports should appear to the right after hovering on the "HMIS Reports" folder.
- Select "APR for CoC Grant-Funded Projects" first in the list of reports that appear to the right when hovering on the "HMIS Reports" folder.
- Set up your report parameters by:
 - Completing the date range There are a couple of options for setting the date range. You can select from the "Predefined Date Range," though this may not provide you the exact dates you

need. You can fill in the dates found below this labeled "Between." The first date box is the beginning date and the second date box is the ending date – for example, 01/01/2013 and 12/31/2013. This will give you all of the clients in your project for the entire year of 2013.

 Choosing the "Grant Project" and "Grant Project Component" - Select the grant your project is under in the drop



down for "Grant Project." This will prompt the next selection in "Grant Project Component." If you do not know this information, feel free to try several selections to find the correct options for your project. You won't break it by choosing different options. If you do not see the correct set up information here, contact the HMIS Help Desk by emailing GAHMISsupport@dca.ga.gov.

 Selecting "Grants" – You may see several options to choose from after selecting "Grant Project" and "Grant Project Component." The aforementioned Grant Project and Grant Project Component will determine the options you see in this box. Select the "Grant" you want to run the APR for by clicking on the name in the box. A green check mark should appear inside the box to show that you have successfully selected a grant. You can run multiple projects on the same report. Simply select multiple "Grants" by clicking on the name in the box. Again, you will see the green check mark inside the box to indicate you've selected it. To unselect one, simply click on it again and you will see the green check mark disappear.



- Selecting "Project Type" Click on the drop down box to select your Project Type. What is selecting in Project Type will determine what projects you can select in the next step "Filter by Projects."
- Clicking on "Projects: Filter by Projects" to select your project. Same set up as "Grants." To select a project click on the name in the box and a green check mark will appear inside the box to show that you have successfully selected it. Multiple projects can be selected here as well. To deselect a project, click on it again and the green check mark should disappear indicating the project is no longer selected for the report.
- Click on the "**Report**" button found on the bottom right-hand side of the screen. This will begin running your report. You should see your report pop up in a new window within seconds.

STANDARD REPORTS	📀 ★ 📮 Annual Performance Report (APR) for CoC Grant-Funded Programs	- P
MY CLIENTTRACK	Between:* 01/01/2016 and 12/31/2	2016 📖
HMIS REPORTS	Organization(s) - Indicate which organizations should be included in the report by selecting each only shows organizations you are authorized to view.	n organization separately, or click the 🎺 icon to select all. Note: The list
2 Data Explorer	Organization(s):* VMy Training Organization	·
HUD / HMIS Reports	Grant Program - The APR for CoC Grant-Funded Programs is dependent upon the grant program	and related component.
	Grant Program:* HUD:CoC	~
	Grant Program Component:* Permanent Supportive Hous	ing 🗸
	Grant(s) - This list displays grants that belong to the organizations you selected above. Indicate separately, or click the ₯ icon to select all.	which grants should be included in the report by selecting each grant
	Grant(s): 🗹 Training - CoC (PH) 🛛 🛷	
	Program(s) - Check the box to limit report results by selected programs. When checked, the list Indicate which programs should be included in the report by selecting each program separately,	
	Project Type: PH - Permanent Supportive F	Housing (disability required for entry) 🗸
	Program(s): ✓ Filter by Program(s) No Program On Enrollmen ✓ Training - CoC (PH)	·
		👍 Report 🕼 Schedule Report 🗙 Cancel

Home	Annual Performance Report	(APR) for CoC (rant-Fun 3 🖒 🔖	ided Programs	rain33 (Testing)	Help Sign Out
STANDARD REPORTS MY CLIENTTRACK HMIS REPORTS Data Explorer HUD / HMIS Reports	Report Selection Report Period: Organization(s): Grant Program: Component: Grant(s): Program(s):	ack™	ation ve Housing	con to select all.	Note: The list

To Drill Down and Find Missing Data

After your report populates and opened in the new window, you can click through with the green arrows at the top of the window and see where you have "Missing" data. To find clients who are missing data, follow these steps:

• Click on the **blue link** for that section where you are missing data – for example "Q.7 Data Quality." **Please note that not all sections have a link to select. You may be able to find this missing data in another section of the report or you can contact the HMIS Help Desk for assistance.*

Home	Annual Performance Report (APR) for CoC Grant	-Funded Programs			rain33 (Testing) Help Sigi	n Out
No. Harr Daabhaard				💽 📕 🎬 🗶 📕		
User Dashboard				^		
	Q7. Data Quality					
STANDARD REPORTS	rotar number or chents		245		-	2
MY CLIENTTRACK	Total number of Adults		125			~
	Total number of Unaccompanied Children	ı	0			
HMIS REPORTS	Total number of Leavers		36		con to select all. Note: The lis	st
2 Data Explorer	HMIS or Com	parable Database Data Quality				
	Data Element	Don't Know or Refused	Missing Data			
HUD / HMIS Reports	First Name	0	0			
	Last Name	0	0			

• Another window should pop up with more detailed information for this section. You may be able to find your missing data in this screen, but it may be more helpful to **export it** to find the missing data.

User Dash	Page	of 37 🔖 🔖		
STANDARD RE MY CLIENTTR/ HMIS REPORTS	Clier	ntTrack™	APR for CoC Grant	-Funded Programs - Clients Revision 2.1 2/9/2016 1:08:27 PM DSI
Data Explo	Report Sele: Report Period: Organization(s) Grant Program: Component: Grant(s): Program(s):			
	Age Race	Ethnicity Gender Adult Unacco- Leave / mpanied / Child Minor Stayer		rior Prior Housing Exit dence Zip Status Destination Code ach grant
	Case: ClientID: 46 White	Anderson, Charles 406530 Last Name: Anderson Hispanic/L Male Adult No Stayer atino	First Name: Charles 10/15/2015 N/A No Yes Emerge shelter, hotel or paid for emerge shelter	ncy including motel with ncy ted above.
	ClientID: 15 White	406542 Last Name: Anderson Hispanic/L Female Child No Stayer atino	First Name: Sandra 10/15/2015 N/A	
	Case: ClientID: 47 Multi- Racial	Banks, Piggy 406414 Last Name: Banks Hispanic/L Female Adult No Stayer atino	First Name: Piggy 02/02/2016 N/A No Yes Missing	

- To export, click on the **Excel icon with the gold spindle** in the upper right-hand corner of the new window that appears after clicking on the section header. You may be prompted to open the document, click on "Open" to open the Excel spreadsheet with the client data. **If you are prompted to save the spreadsheet before opening it, please change your download settings on your Internet browser to automatically open downloads so no client information is saved to your computer when exporting.*
- You will see the word "**MISSING**" on the spreadsheet where you are missing data. The columns are labeled at the top of the spreadsheet and client names are on the far left-hand side of the spreadsheet. You can then go to client records and complete the missing data. Please remember, some data elements are not required for ALL clients. For example, you may see "missing" listed for the domestic violence assessment for a child under the age of 18, however, the domestic violence assessment is not required for children.

To Complete Missing Data on a Client Record

Once you have identified which clients are missing important data on your APR, you can edit the client information with the appropriate steps below.

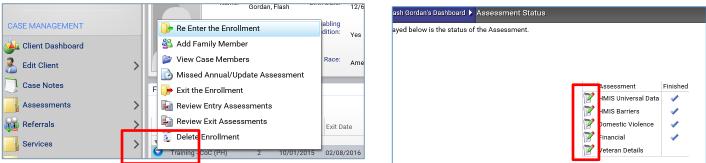
To Edit Disabling Condition or Veteran Status

• Go to the client record for whom the Disabling Condition or Veteran Status is missing.

- Click on "Edit Client" in the list of case management tools found on the left-hand side of the client record.
- Scroll down to **"Disabling Condition"** or **"Veteran Status"** and update the information with the drop down box provided.
- Scroll down and click **"Save"** to save the changes to the client record.

To Edit Entry or Exit Assessments (including Prior Residence Data, Domestic Violence Assessment, Financial Assessment and more)

- Go to the client record for whom entry or exit data is missing.
- Click on the blue play button beside your project enrollment located centrally on the client record.
- Select **"Review Entry Assessments"** or **"Review Exit Assessments"** in the drop down list that appears after clicking on the blue play button.
- Edit the entry or exit assessments by clicking on the little notepad beside the specific assessment you wish to update.
- Click **"Save"** to save the changes to the assessment and you will return to the list of entry or exit assessments.



Please note to change the exit destination or exit reason, you will need to exit the client again to access these specific data fields as they are not included in the list of exit assessments when reviewing exit assessments. Once you have started the exit workflow, edit the destination or reason and click on "Save." When you go to the next screen in the exit workflow, click on the black "X" in the upper right-hand corner of the exit workflow window located in the upper left-hand corner of the client record. This will cancel the exit workflow, saving your changes and saving your previous exit assessment information.

Clients	Ŧ	ClientTrack™	5	All Sea	arch		Q			🜲 Train33 (Testing) 🛛 Help 🔹 Sign Out
Find Client		Flash Gord	dan _{Male}	Â						
Project Entry		HUD Program		<u> </u>	J - CoC (PH) 🕨	/ Enrollme			·	¥∎ (≣ 1
Client Dashboard			×	To exit the	client from the	e Enrollment, ent	er the Exit Da	ite and Destinat	ion.	
CASE MANAGEMENT		Exit Enrollment Exit Assessments			* 02/08/201 * Permanen		ormerly hor	neless person	ıs (such as: (CoC project; or HUD legacy programs; or HOPW
Client Dashboard				Exit	Completer	-		·	~	
Edit Client	>			Reason:		nager Assignm	nent: Trai	n33 🧐		
Case Notes					End	Case Assignm	nent: 🛛 🗹 🤇			
Assessments	>									
Referrals	>									
Services	>									
Household Members	>									
				<						>
										Save

RHY Program Data Intake	HUD Program	🕤 Training - CoC (PH) 🕨 Enrollment Exit 🕨 🖊	[#] Universal Data Assessment	ð 🚔 👔					
	Exit	Complete the information below related to the s	Complete the information below related to the selected client's housing status and other relevant information.						
Client Dashboard	II X								
	Exit Enrollment		Default Client's Last Assessment 🥑						
CASE MANAGEMENT	Exit Assessments	E							
Lient Dashboard		Assessment Date:*	02/08/2016						
Edit Client		Age at Assessment:	46						
		Assessment Type:*	Exit V						
Case Notes		Assessor:*	Train33						
A		Program:*	Training - CoC (PH) V						

If you need any assistance running your APR or finding and completing missing data, contact the HMIS Help Desk at <u>GAHMISsupport@dca.ga.gov</u>.