



DV CLIENTTRACK USER MANUAL

AN INSTRUCTION GUIDE ON HOW TO USE CLIENTTRACK, A WEB-BASED CASE MANAGEMENT SYSTEM

CONTENTS

Objectives.....3

Contacts4

 Staff.....4

 DV ClientTrack Help Desk.....4

 ClientTrack Access.....4

Security Policies & Procedures4

 Privacy and Client Information Restrictions.....5

 ClientTrack Computers.....5

 Logging Into the System.....5

Overview of ClientTrack Features6

 User Dashboard6

 Client Dashboard8

 Case Management Tools.....9

 Household Members10

 Notifications.....10

Managing Client Information and Program Enrollments11

 Finding a Client in the System.....11

 Adding a New Client with a Program Enrollment12

 Adding Household Members14

 Program Enrollment.....15

 HMIS Universal Data Assessment for Intake Workflow.....15

 HMIS Barriers Assessment for Intake Workflow.....16

 Domestic Violence (DV) Assessment for Intake Workflow17

 Crimes Assessment18

 Financial Assessment for Intake Workflow.....19

 Adult Education for Intake Workflow21

 Legal Assessment for Intake Workflow.....22

 Transportation Assessment for Intake Workflow22

 DV Universal Data Assessment for Child at Intake23

 HMIS Barriers Assessment for Child at Intake23

 Child Education Assessment24

 Completing the Intake Workflow.....24

 Pausing a Workflow24

 Adding Services25

Quick Services	26
Case Notes	26
Update/Annual Assessment	28
HMIS Universal Data Assessment for Update/Annual Workflow	29
HMIS Barriers Assessment for Update/Annual Workflow	29
DV Assessment for Update/Annual Workflow.....	30
Financial Assssment for Update/Annual Workflow	31
Adult Education Assessment for Update/Annual Workflow.....	31
HMIS Universal Data Assessment for Child at Update/Annual.....	31
HMIS Barriers Assessment for Child at Update/Annual.....	32
Child Education Assessment at Update/Annual	32
Program Discharge	33
HMIS Universal Data Assessment for Exit Workflow	34
HMIS Barriers Assessment for Exit Workflow	34
Financial Assessment for Exit Workflow	35
Adult Education Assessment for Exit Workflow	36
Exit Workflow for Children.....	37
HMIS Universal Data Assessment for Child at Exit.....	37
HMIS Barriers Assessment for Child at Exit.....	38
Child Education Assessment at Exit	38
Completing the Exit Workflow	39
Managing Providers	40
Basic Reports.....	42
Service Summary Report.....	42
Annual Performance Report (APR)	43

OBJECTIVES

Thank you for using ClientTrack for your case management needs. ClientTrack is an electronic data collection system for persons who access a variety of services for homeless prevention and/or rapid re-housing services. Aggregate data can be used to understand the size, characteristics, and needs of the population at the local, state, and national levels. ClientTrack enables you to track 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

- IHCDA staff list and contact information
- DV ClientTrack help desk information

SECURITY POLICIES & PROCEDURES

- DV Acknowledgment
- Computer storage
- Username and password

OVERVIEW OF CLIENTTRACK FEATURES

- User dashboard
- Client dashboard
- Case management tools
- Household members

MANAGEMENT OF CLIENT INFORMATION AND PROGRAM ENROLLMENTS

- Intake workflow
- Services
- Case notes
- Update/Annual Assessment
- Exit workflow
- Managing providers

BASIC REPORTS

- Service Summary
- Annual Performance Report (APR)
- Universal Data Quality Report

CONTACTS

STAFF

Jill Robertson

Director of Community Services
 Indiana Housing & Community Development Authority
jirobertson@ihcda.in.gov
 317.234.7572

Nastacia' Moore

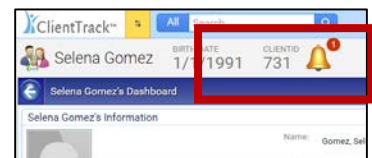
HMIS/DV Trainer & Data Analyst
 Indiana Housing & Community Development Authority
 317.232.2761
namoore@ihcda.in.gov

Valerie Walton

HMIS Data Analyst
 Indiana Housing & Community Development Authority
vwalton@ihcda.in.gov
 317.232.2873

DV CLIENTTRACK 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. This number is found at the top of the client record to the right of the client's name and date of birth as seen outlined by the red box. **Please use the client ID number when emailing the help desk if applicable.**



DV ClientTrack Help Desk: DVHelpDesk@ihcdaonline.com

CLIENTTRACK ACCESS

You can access HMIS with the following link:

www.ihcdaonline.com/IDV

ClientTrack for Domestic Violence Providers

SECURITY POLICIES & PROCEDURES

Personal Protected Information (PPI) is considered any information that could lead to individual identification. Agencies participating in ClientTrack 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 Domestic Violence (DV) ClientTrack environment is a closed system. Client level data is only seen by your organization and the support team.

A client should be provided the **DV Acknowledgement Form**

(http://www.in.gov/myihcda/files/Final_DV_acknowledgement_form_2016.pdf) and sign it accordingly. A client can refuse data collection or data entry into DV ClientTrack, but the client should be asked. The agency cannot determine participation on behalf of the client. ***No person is to be refused services regardless of their participation in ClientTrack.***

You can find Indiana's Balance of State (BOS) security plan on the partner website, as well as other helpful forms and resources: <http://www.in.gov/myihcda/hmis.htm>.

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 user names and passwords are NOT 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 ClientTrack or Password in a Rolodex). ClientTrack security policies require the use of strict passwords. Passwords must have:

- At least one number
- Between 8 and 12 characters
- At least one non-letter, non-numeric character (!#@\$)
- At least one capital letter

New passwords will be required upon first login. **Accounts are automatically deactivated after 30 days of inactivity for security purposes.** You will be required to change your password every 90 days for security purposes. If you need assistance with your username and password contact the Help Desk by emailing DVHelpDesk@ihcdaonline.com and someone will assist you.

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. Some older versions of these web browsers can cause unique issues in ClientTrack. We recommend that you work with your IT personnel to ensure you have the newest version of your web browser.

Open your web browser and go to <https://ihcdaonline.com/IDV/>. 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.

ClientTrack™

Sign In to ClientTrack

User Name

Password

[Sign in](#)

What's New

Medicaid Innovations Conference
1/18/2017

Eccovia Solutions is a proud sponsor of the Medicaid Innovations Conference, February 1-3, 2017 in Orlando, Florida. This conference brings together state Medicaid professionals and senior-level healthcare professionals to discuss insights into Medicaid managed care, the importance of addressing the social determinants of health, and new models and strategies to improve care coordination and control costs. [...] The post Medicaid Innovations Conference appeared first on Eccovia Solutions.

Care Coordination and Transitions Summit
1/18/2017

Eccovia Solutions is excited to be a sponsor of the 8th Annual Care Coordination and Care Transitions Summit, January 25-26, 2017 in Atlanta, Georgia. The summit brings together leaders from hospitals, health systems, health plans, and managed care organizations to discuss best practices for improving care coordination and collaborating across the care continuum. The healthcare [...] The post Care Coordination and Transitions Summit appeared first on Eccovia Solutions.

Gila River Indian Community Selects ClientTrack Case Management for their Tribal Social Services
1/12/2017

Salt Lake City, UT Jan 12, 2017 - Eccovia Solutions, a leading provider of health and human services cloud-based case management solutions was selected by the Gila River Indian Community Tribal Social Services to manage its broad array of programs designed to keep their community healthy and safe. Gila River Indian Community selected ClientTrack Case [...] The post Gila River Indian Community Selects ClientTrack Case Management for their Tribal Social Services appeared first on Eccovia Solutions.

Visit EccoviaSolutions.com for more information.
Copyright © 1993-2017 Eccovia Solutions - All Rights Reserved.

Select the workgroup called “2014 IDV: HUD Programs.” Also make sure your organization and location is selected appropriately. Click on “Use These Settings” to continue. You will be required to “Accept” the Terms of Agreement when you log into the system for the first time.

ClientTrack™

Workgroup

2014 IDV: HUD Programs

Organization

My Fake Organization

Location

My Fake Organization

[Use these settings](#)
Open ClientTrack using these settings.

What's New

Medicaid Innovations Conference
1/18/2017

Eccovia Solutions is a proud sponsor of the Medicaid Innovations Conference, February 1-3, 2017 in Orlando, Florida. This conference brings together state Medicaid professionals and senior-level healthcare professionals to discuss insights into Medicaid managed care, the importance of addressing the social determinants of health, and new models and strategies to improve care coordination and control costs. [...] The post Medicaid Innovations Conference appeared first on Eccovia Solutions.

Care Coordination and Transitions Summit
1/18/2017

Eccovia Solutions is excited to be a sponsor of the 8th Annual Care Coordination and Care Transitions Summit, January 25-26, 2017 in Atlanta, Georgia. The summit brings together leaders from hospitals, health systems, health plans, and managed care organizations to discuss best practices for improving care coordination and collaborating across the care continuum. The healthcare [...] The post Care Coordination and Transitions Summit appeared first on Eccovia Solutions.

Gila River Indian Community Selects ClientTrack Case Management for their Tribal Social Services
1/12/2017

Salt Lake City, UT Jan 12, 2017 - Eccovia Solutions, a leading provider of health and human services cloud-based case management solutions was selected by the Gila River Indian Community Tribal Social Services to manage its broad array of programs designed to keep their community healthy and safe. Gila River Indian Community selected ClientTrack Case [...] The post Gila River Indian Community Selects ClientTrack Case Management for their Tribal Social Services appeared first on Eccovia Solutions.

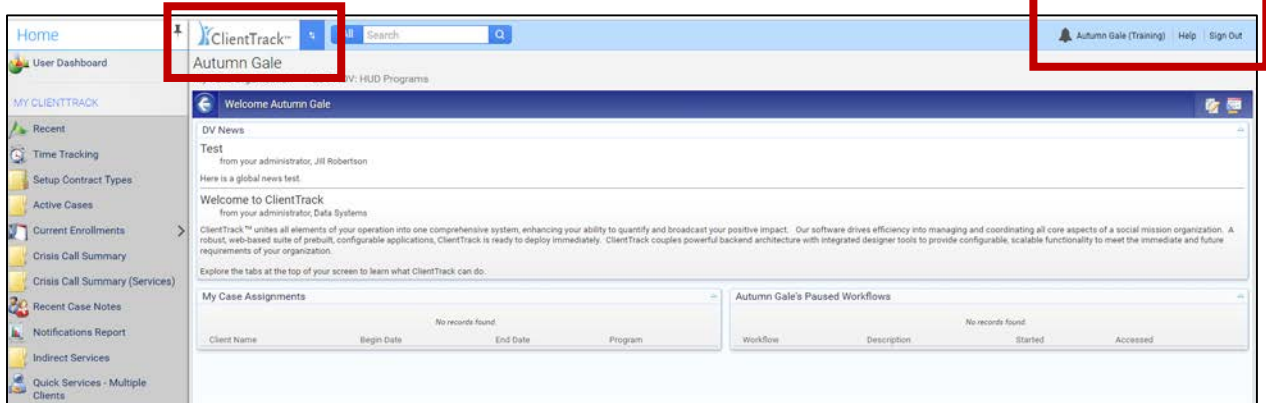
Visit EccoviaSolutions.com for more information.
Copyright © 1993-2017 Eccovia Solutions - All Rights Reserved.

OVERVIEW OF CLIENTTRACK FEATURES

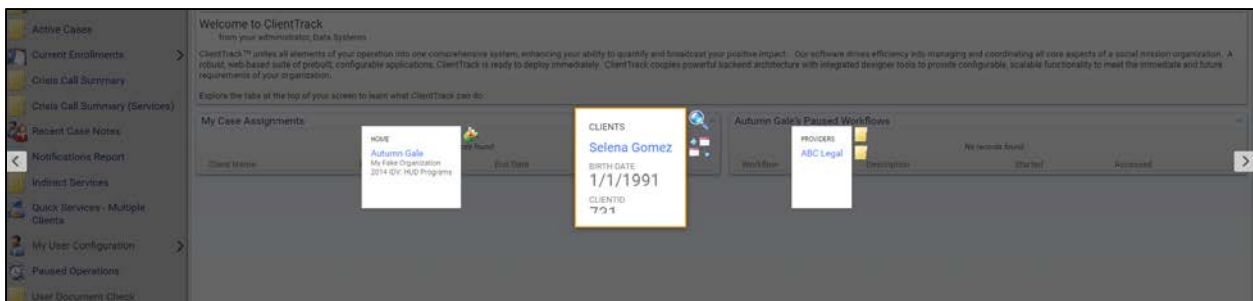
USER DASHBOARD

You will be directed to your **User Dashboard** on the “Home” screen and notified of any important “DV News” items IHCD wishes to communicate (i.e. upcoming trainings, changes etc.). This is the first screen you come to after logging into the system.

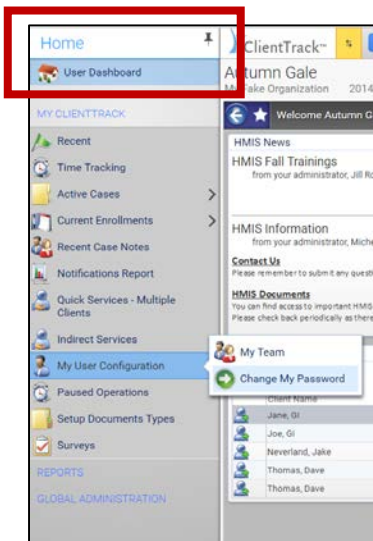
You can access all three screens, **“Home,” “Clients,”** and **“Providers,”** which provide different features for managing your cases, by clicking on the link with white arrows beside the ClientTrack logo outlined with the red box on the next page.



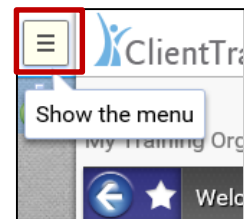
After clicking on that icon, you will see the three boxes appear labeled, **“Home,” “Clients,”** and **“Providers,”** and you can toggle between them by clicking on the appropriate box to take you to that section of ClientTrack as seen below.



The **“Sign Out”** link is located in the upper right-hand corner of the screen. **Please be sure to “Sign Out” any time you need to leave the database to ensure security of client data.**



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.”** When you first log onto the system, you may want to **“Pin”** the menu on the left side of the screen to leave the tool bar open. In order to **“Pin”** the menu, click on the box with three lines highlighted in red as seen to the right here. Once the Menu is visible, click on the push pin to keep the menu open. This is same process when using the Client Dashboard.



You can also change your password with the **“Change My Password”** link by clicking on **“My User Configuration”** under **“My ClientTrack.”** All of these tools are designed to maximize your time and grant you easy access to your cases.

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 below **“My ClientTrack”** on the left-hand side of the screen.

CLIENT DASHBOARD

The client dashboard is divided up into sections with case management tools on the left-hand side of the record to help you easily find client information and manage program enrollments, services, case notes, and more. Here is a review of the client dashboard:

The screenshot displays the ClientTrack interface for a client named Selena Gomez. The dashboard is organized into several sections, each highlighted with a purple callout box and numbered 1 through 4:

- 1. Basic Information:** Located at the top, it shows the client's name (Selena Gomez), birth date (1/1/1991), client ID (731), gender (Female), ethnicity (Hispanic/Latino), race (Black or African American), age (25), and veteran status (Yes).
- 2. Program Enrollments:** This section displays a table of enrollments. One enrollment is highlighted with a red box: "My Fake DV Shelter" with a blue action wheel icon.
- 3. Case Manager Assignments:** This section shows a table of assignments, including the case manager (Autumn Gale) and the status (Inactive).
- 4. Services:** This section displays a table of services, including "Case Management" services provided by "My Fake Organization" on various dates.

- At the very top of the client dashboard, you will see the **client's "Basic Information"** and demographics. You can find the **client ID number** at the top of the client dashboard, which is automatically assigned to the record when created.
- In the center of the client dashboard, you will see all of the client's past and present **program enrollments**. There is a blue action wheel you can click on to easily manage your program enrollment. When you click on the blue action wheel, a drop down list will appear where you can:
 - Edit Enrollment Workflow** – Edit the enrollment date or other entry information with this feature.
 - 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 with Mom. 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 program enrollment.
 - Update/Annual Assessment** – Use the Update/Annual Assessment to conduct annual assessments or capture changes to a client's status since enrollment.
 - 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 data that was not captured at those points in time.

3. **Case Manager Assignments** are located below the enrollments section of the client dashboard. You can manage case assignments here by clicking on “[Client Name] Case Manager Assignments” or clicking on the little pencil beside the case manager’s name. Clicking on the **recycle bin** beside a case manager’s name will delete the case manager from the client record. 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 program enrollment or add new case managers to the client record.

4. **Services** associated with a specific program enrollment will be listed at the bottom of the client dashboard. 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 “[Client Name] Services” above the list of services on the client record. Documenting services is discussed in detail starting on page 25 of this manual.

CASE MANAGEMENT TOOLS

On the **client dashboard** you will find a list of **Case Management Tools** on the left-hand side. The following information outlines features and tools found on the client dashboard, and to access some of these features, you must hover over the link to cause another list of tools to appear as seen below:

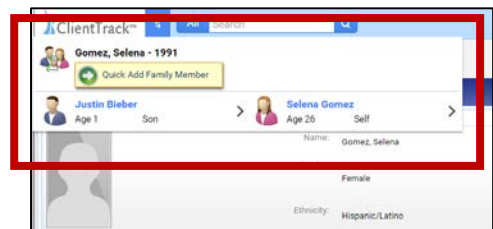
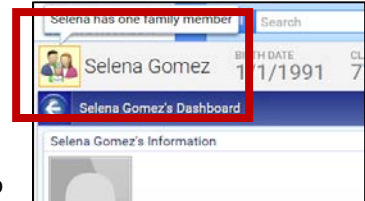


- **Find Client** – To search for a client in the system by first and last name, date of birth, social security number, client ID number, etc.
- **Intake** – To enroll a client in your program.
- **Case Management Tools: (Frequently Used)**
 - **Client Dashboard** – The overview of the client record as seen on the previous page (8).
 - **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.
 - **Family Members** – To review household members.
 - **Assessments** – To review assessments, and please note that all required assessments for your program are captured in the Intake Workflow. This is where you can access the **Self-Sufficiency Matrix**.
 - **Crimes** – To review all Crimes Assessments completed during the Intake workflow.
 - **Protection Orders** – To document and manage Protection Orders for the client.
 - **Enrollments** – To view the list of current and past enrollments the client has accessed.
 - **Services** – To add, edit, and view the list of services the client has accessed.
 - **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 and Client ID Number** - Located at the very top of the client record including the client’s name, gender, date of birth, etc. (Client ID Number is required when communicating electronically about a client record, i.e., when requesting assistance from the help desk).

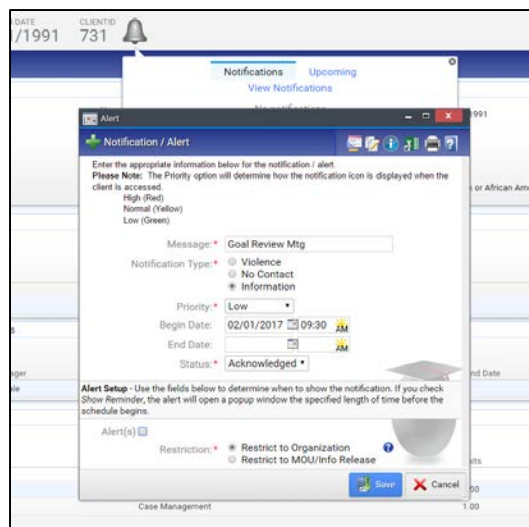
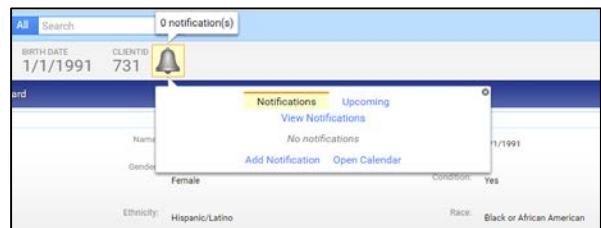
HOUSEHOLD MEMBERS

You can view household members and their client dashboards by clicking on the **multi-colored family icon** at the top of the client record beside the client name. A drop down window will appear with all of the current household members. You can click on the names of the household members in the drop down window to go directly to his/her client record. You can also use the **“Quick Add Family Member”** link in this window to add new household members. **Please note that you will be able to add household members during an Intake workflow as well.** You may also add a family member to an existing enrollment with the **“Add Family Member”** feature (described on page 8) listed when you click on the blue action wheel beside your program enrollment.



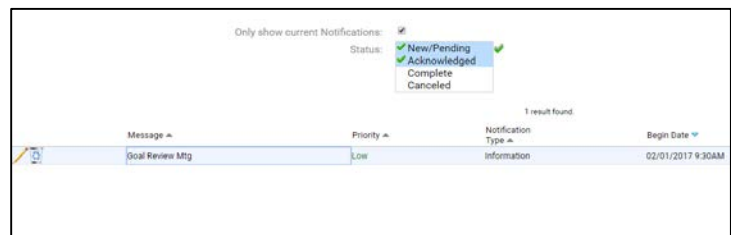
NOTIFICATIONS

ClientTrack features a **“Notifications”** tool on the client dashboard allowing you to set up alerts specific to the client, like reoccurring appointments, required documentation, client deadlines, etc. The Notifications tool is located to the right of the client’s name and client ID number at the very top of the client dashboard.



To add a new notification, click on the bell and a new window will appear below as seen above. Select **“Add New”** to add a new notification. A new window will open where you can set up the new notification as seen to the left here.

After setting up the notification, you can review your notifications and calendar by clicking on the bell and selecting **“View Notifications.”**



MANAGING CLIENT INFORMATION AND PROGRAM 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 and click on “Find Client” in the upper left-hand corner of the screen outlined in red below.

The screenshot shows the ClientTrack interface. The 'Clients' menu is highlighted with a red box, and the 'Find Client' option is selected. The main dashboard displays client information for Selena Gomez, including her name, birth date (1/1/1991), client ID (731), gender (Female), ethnicity (Hispanic/Latino), and race (Black or African American). A table below shows her enrollment in 'My Fake DV Shelter' with 2 case members, enrolling on 01/31/2017 and exiting on 02/11/2017.

Enrollment Description	Case Members	Enroll Date	Exit Date	Organization	Last Assessment Completed	Enroll ID	Exit ID
My Fake DV Shelter	2	01/31/2017	02/11/2017	My Fake Organization	02/11/2017	670	674

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 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

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 remembering to search for nicknames such as “Joe” in addition to “Joseph” or “Jen” in addition to “Jennifer.”

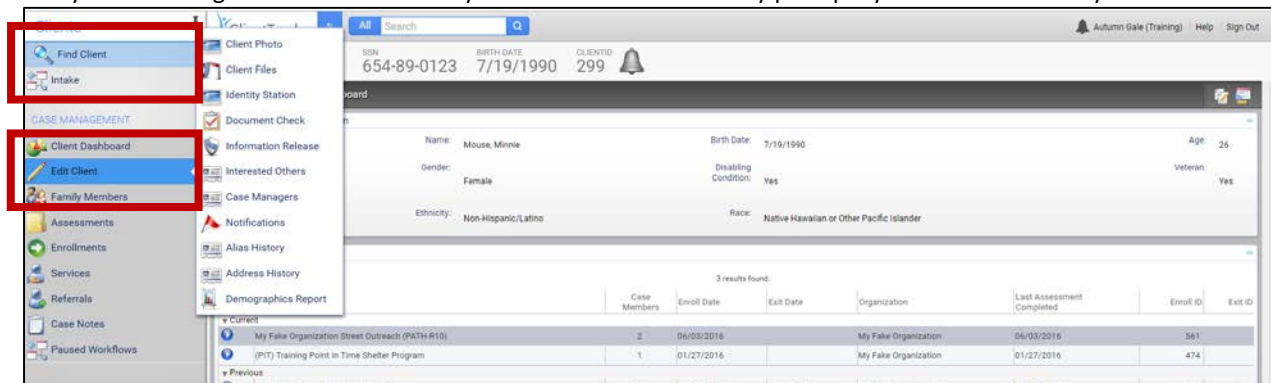
If the client is already in the system, highlight the client name in the search results and click on the **Client Name** to select that record. The selected client’s information will be displayed at the top of the screen and all information entered from this point forward while on the client’s dashboard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

IHCD works to eliminate duplicate records in ClientTrack. Please contact the DV Help Desk by emailing DVHelpDesk@ihcdaonline.com 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 at the top of the record to the right of the client name and date of birth.

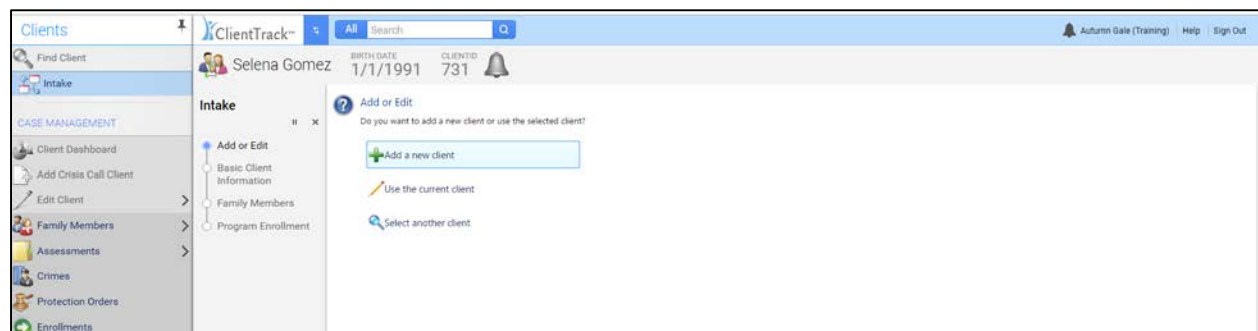
After selecting the client in the search list and going to the client's dashboard, if the client's basic information has changed, click on the **"Edit Client"** link in the list of case management tools found on the left-hand side of the screen outlined in red below to make any necessary changes to the client demographic information (i.e., birth date, ethnicity, name change, etc). ****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.**

ADDING A NEW CLIENT WITH A PROGRAM ENROLLMENT

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



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



Enter your client's first and last name and click **"Next."** If a duplicate client already exists and was not identified during the client search the first time, 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, do not select a client in the displayed list, click **"Next"** to proceed with the intake process.

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. Please do not make up information or answer for the client. All data fields marked with a red * are required fields.**

The screenshot displays the ClientTrack interface for a client named Selena Gomez, born 1/1/1991. The 'Basic Client Information' section is active, showing a form with the following fields and values:

- First Name: Selena
- Last Name: Gomez
- Middle Name: (empty)
- Suffix: (empty)
- Name Quality: Full name reported
- Social Security Number: 000 - 11 - 0000
- Alternate Reference ID: (empty)

The 'Basic Client Demographics' section includes:

- Birth Date: 01/01/1991
- Client Age: 26
- Date of Birth Quality: Full DOB Reported
- Ethnicity: Hispanic/Latino
- Race: (multi-select dropdown with 'Black or African American' selected)
- Gender: Female
- Pregnancy Status: No
- Disabling Condition: No
- Veteran Status: Yes

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.
- **Name Quality** – Describes the quality of the name reported by the client. Options are: Full name reported, Partial, street name, or code name reported, Client doesn’t know, Client refused or Data not collected.
- **Social Security Number (SSN)** – If the client doesn’t know or refuses to provide their SSN, **DO NOT** 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. Please note that “Data not collected” means that the question was not asked of the client and will report as missing on the APR. If the client doesn’t know, the best selection is “Client doesn’t know.”
- **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. If the client reports “Female,” you will be prompted for the client’s “Pregnancy Status” and “Due Date” if applicable.
- **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.”* You can update the disabling condition by clicking on the “Edit Client” link.
- **Veteran Status** – Select the appropriate response as reported by the client. If you select “Yes” for Veteran Status here, you will be prompted in the workflow to complete the Veterans Assessment.
- **Address** – Add the address where the client currently resides (emergency shelter, etc.). If the client enters emergency shelter, you should use their previous address.

- **Family** – Do NOT enter anything in the “Family” field. ClientTrack will create a household/family account automatically.
- **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.

ADDING HOUSEHOLD MEMBERS

Next you will be prompted to add additional household members to include for the program 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.

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.

PROGRAM ENROLLMENT

Programs vary in their data requirements and ClientTrack will prompt you through the workflow to collect all of the required HUD data elements for your specific program. 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 **“Program”** with the drop down box and then select which household members to enroll by clicking on the empty box beside the client(s) name. If a check mark appears by a client name on the program enrollment screen (as seen below), the client will be enrolled in your program. 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.

The screenshot shows the HUD Program Enrollment interface. At the top, it displays the client's name (Selena Gomez), birth date (1/1/1991), and client ID (731). The program selected is "My Fake DV Shelter". Below this, there is a table of household members:

Name	Gender	Age	Project Entry Date	Case Manager	Relationship to Head of Household	Date of Move in
Gomez, Selena	Female	26	01/31/2017	Autumn Gale	Self	
Bieber, Justin	Male	1	01/31/2017	Autumn Gale	Son	

Restrictions: Restrict to Organization, Restrict to MOU/Info Release.

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 IHCD immediately at DVHelpDesk@ihcdaonline.com. Program information must be set up in the system before you can begin to enroll clients.

HMIS UNIVERSAL DATA ASSESSMENT FOR INTAKE WORKFLOW

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

The screenshot shows the Universal Data Assessment interface. Key fields include:

- Assessment Date: 01/31/2017
- Age at Assessment: 26
- Assessment Type: Entry
- Assessor: Autumn Gale
- Program: My Fake DV Shelter
- Housing Status: Category 1 - Homeless
- Client Location: IN-502 - Indiana Balance of State
- Living Situation: Rental by client, no ongoing housing subsidy (22)
- Length of stay in prior living situation: One year or longer
- Approximate date homelessness started: 01/30/2017
- Number of times client has been on the streets, in ES, or SH in the past three years including today: One time
- Total number of months homeless on the street, in ES, or SH in the past three years: One month (this time is the first month)
- Health Insurance: Covered by Health Insurance: Yes

At the bottom, there is a table for Health Insurance coverage:

Type	Status	Reason No	Other Coverage
Private - Employer	Yes	--SELECT--	
Private - Individual	No	--SELECT--	
Medicare	No	--SELECT--	

Definitions of Universal Data Assessment Requirements

- **Assessment Date** – Date the assessment was completed with the client (field will auto-fill with today’s date).
- **Assessment Type** – Defaulted and cannot be changed during the workflow. If you notice that you’re completing the incorrect assessment, contact the DV Help Desk where you will be assisted.
- **Assessor** – Case manager completing the assessment and who will automatically be assigned to all case members.
- **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.
- **Client Location** – Defaulted information that is set up with your program in the system. If this information is missing when completing an assessment, please contact the DV Help Desk.
- **Type of Residence** – Identify where the client was staying on **the night before** the client is enrolled in your program. The built in logic will prompt you for more data depending on the selection made for this question. Those additional data elements are the following:
 - **Did you stay less than 7 nights**
 - **Did you stay less than 90 days**
 - **Length of stay in the prior living situation** – Identify the length of stay for the residence prior to program entry.
 - **On the night before, did you stay on the streets, ES (Emergency Shelter), or SH (Safe Haven)**
 - **Approximate date homelessness started**
 - **Regardless of where they stayed last night – Number of times the client has been on the streets, in ES, or SH in the past three years including today**
 - **Total number of months homeless on the street, in ES, or SH in the past three years** - Data in this section are used along with disabling condition to determine whether or not a client is chronically homeless. *HUD strongly encourages DV 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.*
- **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.

HMIS BARRIERS ASSESSMENT FOR INTAKE WORKFLOW

To select a barrier, click on the drop down box for “**Barrier Present**” and change the status to “**Yes.**” The system defaults “**No**” for all barriers. Complete any required fields that appear after selecting that specific barrier. Please note that the date identified is the program enrollment date – the date the client presents to you and qualifies for entry in the program. It is important to keep in mind that clients must have at least one barrier to be eligible for some programs (such as Permanent Supportive Housing).

ClientTrack™ - All Search

Autumn Gale (Training) Help Sign Out

Client: Selena Gomez BIRTH DATE: 1/1/1991 CLIENT ID: 731

Intake

Universal Data Assessment → Barriers

Use this form to identify whether a client has each individual barrier or not. The Client's last assessment is displayed as a default. You may, optionally, click **Previous Barriers Detail** to view information about the defaulted records or click **View Barrier History** to review all previous barriers.

View Barrier History

Assessment Active

Identified Date: 01/31/2017

Barrier	Help	Barrier Present	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
Domestic Violence		No					Previous Barrier
Alcohol Abuse		No					Previous Barrier
Chronic Health Condition		Yes	No	Yes	No		Previous Barrier
Developmental Disability		No					Previous Barrier
Drug Abuse		No					Previous Barrier
HIV/AIDS		No					Previous Barrier
Mental Health		No					Previous Barrier
Physical Disability		No					Previous Barrier

If **no barriers** are present at enrollment, select all barriers and leave the **“Barrier Present”** status as **“No”** and click **“Save & Close.”**

DOMESTIC VIOLENCE (DV) ASSESSMENT FOR INTAKE WORKFLOW

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. Click **“Next”** to continue through the workflow.

ClientTrack™ - All Search

Autumn Gale (Training) Help Sign Out

Client: Selena Gomez BIRTH DATE: 1/1/1991 CLIENT ID: 731

Intake

Universal Data Assessment → Domestic Violence Assessment of Victim

Domestic Violence Assessment of Victim

Other Information and Offender's Relationship to Victim Legal / Crime Information

DOMESTIC VIOLENCE ASSESSMENT OF VICTIM

Domestic Violence Assessment

Default Client's Last Assessment

Assessment Active

Victim Information

Assessment Date: 01/31/2017

Is client a victim of domestic violence: Yes

When Exp Occurred: Within the past three months

Currently Fleeing: Yes

Victimization Date: 01/30/2017

Victimization Type: Primary Victimization

Age at Time of Incident: 26

Interviewer:

Assessment Description:

Domestic Violence - This is where you put in your additional help.

Interview Type: In-Person Phone Call Only

Physical:

Sexual:

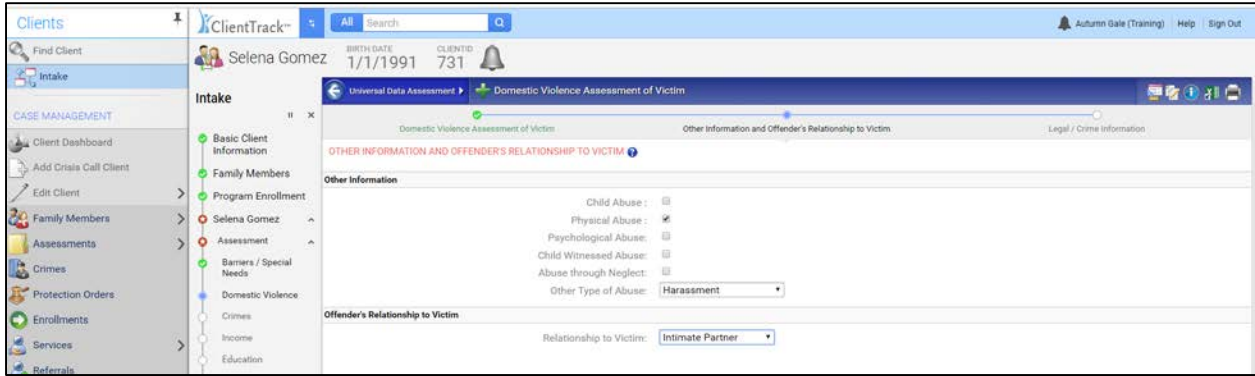
Psychological:

Stalking:

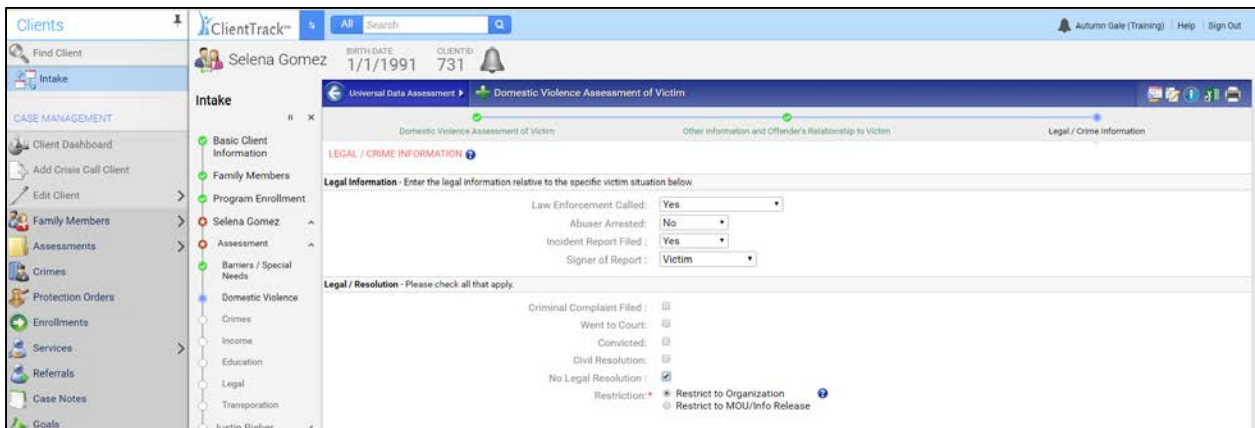
Human Trafficking:

Next

Continue completing the requested information, noting that all fields with an **asterisk *** are required data elements. Click **“Next”** to proceed in the workflow.

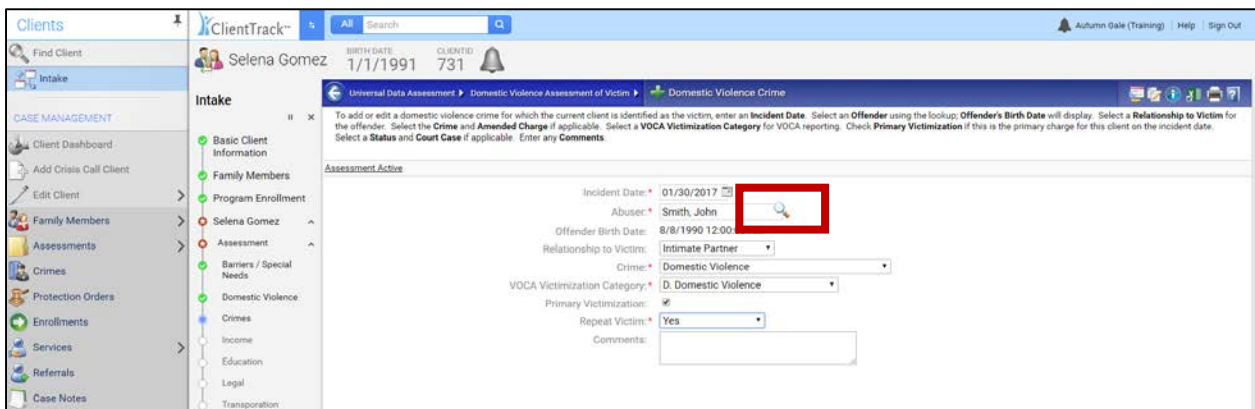


You will come to the last screen in the DV Assessment. Click **“Finish”** to complete the DV Assessment as seen below.



CRIMES ASSESSMENT

Complete the required information for the Crimes Assessment. **“Abuser”** name and information will be added on this assessment. You can search for a name by clicking on the small spy glass icon field outlined in red below.



A new window will appear when you click on the spy glass where you can search for an existing name in the system. If a name is already in the system, select that name in the search list to add the person to the Crimes Assessment as the **“Abuser.”** If the individual is not in the system, you can add a new name by clicking on the **“Add New”** button. Complete the individual’s information and click **“Save.”**

After you have added the **“Abuser”** to the Crimes Assessment and completed all the required information, click **“Save”** to continue in the workflow.

FINANCIAL ASSESSMENT FOR INTAKE WORKFLOW

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 Financial Assessment for children in the household.**

The screenshot shows the ClientTrack interface for Selena Gomez. The main window displays the 'Income and Sources, Non-Cash Benefits' section. The 'Income' table is as follows:

Type	Description	Monthly Amount	Restriction
<input type="checkbox"/>	Earned Income (i.e., employment income)		Restrict to Organization
<input type="checkbox"/>	Unemployment Insurance		Restrict to Organization
<input type="checkbox"/>	Supplemental Security Income (SSI)		Restrict to Organization
<input type="checkbox"/>	Social Security Disability Income (SSDI)		Restrict to Organization
<input type="checkbox"/>	Veteran's Disability Payment		Restrict to Organization
<input type="checkbox"/>	Private Disability Insurance		Restrict to Organization
<input type="checkbox"/>	Worker's Compensation		Restrict to Organization
<input type="checkbox"/>	Temporary Assistance for Needy Families (TANF)		Restrict to Organization
<input type="checkbox"/>	General Assistance		Restrict to Organization
<input type="checkbox"/>	Retirement Income from Social Security		Restrict to Organization
<input type="checkbox"/>	Veteran's Pension		Restrict to Organization
<input type="checkbox"/>	Other Pension		Restrict to Organization
<input checked="" type="checkbox"/>	Child Support	\$400.00	Restrict to Organization
<input type="checkbox"/>	Alimony or other spousal support		Restrict to Organization
<input type="checkbox"/>	Other Income		Restrict to Organization
Count/Total Monthly Income		1	\$400.00

Below the table is a 'Non-Cash Benefits' section and a 'Save and Close' button.

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
- **Pension From Former Job** – Income from a private employer or military retirement pay
- **Supplemental Security Income** – A federal program 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
- **VA Service-Connected 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
- **VA NonService-Connected Disability** - To assist wartime veterans in need whose non-service-connected disabilities are permanent and total preventing them from following a substantially gainful occupation.
- **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.
- **Other Income** – Any source of income that is not previously listed.

Definitions of Non-Cash Benefits

- **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 stores.
- **Special Supplemental Nutrition Program for Women, Infants and Children (WIC)** – A program 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 Rental Assistance (PSH)** – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development.
- **Temporary Rental Assistance (RRH)** – ESG rental assistance
- **Other Source** – Any source not previously listed above.

ADULT EDUCATION FOR INTAKE WORKFLOW

Complete the required information on the Adult Education Assessment. An education assessment will be prompted for each adult and child in the household. Click **“Save”** to continue in the workflow.

The Adult Education will conclude the workflow for your client unless there are additional household members to enroll. If you have additional household members to enroll, you will be

prompted through the required assessments for each adult and child in the household. The assessments may vary depending on the data requirements for your specific program. The assessments required for adults will look the same as those outlined for the head of household. The assessments for children will look differently and are previewed in the next section of this manual.

LEGAL ASSESSMENT FOR INTAKE WORKFLOW

Complete the Legal Assessment and click **“Save”** to continue in the workflow. This assessment is not a required assessment and you may **“Skip”** the assessment if your agency does not utilize this assessment.

The screenshot shows the ClientTrack interface for a client named Selena Gomez. The left sidebar contains navigation options like 'Find Client', 'Intake', and 'CASE MANAGEMENT'. The main content area is titled 'Legal Assessment' and includes a 'Default Last Assessment' button. The form contains the following sections:

- Assessment Active:** Date of Assessment: 01/31/2017, Assessment Description: [text input]
- Legal Situations:** Are you currently involved in any of the following legal situations?
 - Divorce:
 - Eviction:
 - Bill Collector:
 - Pending Criminal Charges:
 - Order of Protection:
 - Probation / Parole:
 - Custody Issues:
 - Child or Spousal Support:
 - Warrant for Arrest:
 - CPS Involvement:
 - Other:
- Other Legal Questions:**
 - Do You Currently Have Legal Representation:
 - How Many Days, Past 90 Days, experiencing Legal Pr: [text input]
- Legal Notes:** Please describe any other Legal Information you think we should be aware of.
 - Legal Description Notes: [text input]

At the bottom right, there are 'Save' and 'Skip' buttons, and a restriction setting of 'Restrict to Organization'.

TRANSPORTATION ASSESSMENT FOR INTAKE WORKFLOW

Complete the Transportation Assessment and click **“Save”** to continue in the workflow. This assessment is not a required assessment and you may **“Skip”** the assessment if your agency does not utilize this assessment.

The screenshot shows the ClientTrack interface for a client named Selena Gomez. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Transportation Assessment' and includes a 'Default Client's Last Assessment' button. The form contains the following sections:

- Assessment Active:** Assessment Date: 01/31/2017, Primary Transit Means: Own Vehicle
- Vehicle:** In the section below, enter details about the client's vehicle if they have one.
 - Vehicle Ownership: Own
 - Vehicle Make: Honda
 - Vehicle Model: Accord
 - Vehicle Year: 2007
 - Vehicle Description: [text input]
 - Vehicle Condition: In need of repair
 - Vehicle Condition Description: [text input]
 - Registered State: IN
 - License Plate Number: [text input]
 - Insurance Company: [text input]
 - Insurance Renewal Date: [text input]
- Drivers License:** If the client has a driver's license, please enter this information in the section below. If they do not have a driver's license, skip this section.
 - License Number: [text input]
 - License State: -SELECT-
 - License Expiration Date: [text input]

At the bottom right, there are 'Save' and 'Skip' buttons, and a restriction setting of 'Restrict to Organization'.

DV UNIVERSAL DATA ASSESSMENT FOR CHILD AT INTAKE

Complete the required data elements for the child on the DV 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.

The screenshot shows the 'Universal Data Assessment' form for Justin Bieber. The form includes the following fields and options:

- Assessment Date:** 01/31/2017
- Age at Assessment:** 1
- Assessment Type:** Entry
- Assessor:** Autumn Gale
- Program:** My Fake DV Shelter
- Housing Status:** Category 1 - Homeless

Health Insurance: Covered by Health Insurance: Yes

Type	Status	Reason No	Other Coverage
Private	Yes		
Private - Employer	No	-SELECT-	
Private - Individual	No	-SELECT-	
Medicare	No	-SELECT-	
Medicaid	No	-SELECT-	
State Children's Health Insurance Program S-CHIP	No	-SELECT-	
Military Insurance	No	-SELECT-	
Other Public	No	-SELECT-	
State Funded	No	-SELECT-	
Combined Children's Health Insurance / Medicaid Program	No	-SELECT-	
Indian Health Service (IHS)	No	-SELECT-	
Other	No	-SELECT-	

HMIS BARRIERS ASSESSMENT FOR CHILD AT INTAKE

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.”**

The screenshot shows the 'Barriers' assessment form for Justin Bieber. The form includes the following fields and options:

- Assessment Active:** Yes
- Identified Date:** 01/31/2017

Barrier	Help	Barrier Present	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
Alcohol Abuse		No					
Chronic Health Condition		No					
Developmental Disability		No					
Drug Abuse		No					
HIV/AIDS		No					
Mental Health		No					
Physical Disability		No					

CHILD EDUCATION ASSESSMENT

The screenshot shows the ClientTrack interface for Justin Bieber (Client ID: 736, Birth Date: 5/5/2015). The 'Child Education Assessment' workflow is active. The left-hand navigation menu is highlighted with a red box, and a red arrow points to the 'Child Education' link. The main form area shows the 'Assessment Date' as 01/31/2017, 'Highest Grade Completed' as 'No School Completed', and 'Current Enrollment Status' with radio buttons for 'Yes', 'No', 'Don't Know', and 'Refused'. There is also a 'Comments' field and a 'Restriction' section with options for 'Restrict to Organization' and 'Restrict to MOU/Info Release'.

Enter the **“Highest Grade Completed”** for the child, and then select if the child’s **“Current Enrollment Status.”** The built in logic may require additional information depending on how you answer the questions. Click **“Save”** when completed.

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.

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 above). Clicking on the link beside the green dot will take you to that specific section of the workflow where you can edit information.

The screenshot shows the ClientTrack interface for Selena Gomez (Client ID: 731, Birth Date: 1/1/1991). The 'Intake' workflow is complete, and a 'Finish' button is visible in the workflow window. A message above the button states: 'You're done! All required steps have been completed.' The left-hand navigation menu is visible, showing links for 'Basic Client Information', 'Family Members', 'Program Enrollment', 'Selena Gomez', and 'Justin Bieber'.

PAUSING A WORKFLOW

You may also **“Pause”** a workflow by clicking on the pause button located in upper right-hand corner of the workflow window beside the black **“X”** (as seen on page 20 in the red box with the red arrow). The black **“X”** will delete the workflow. The pause feature will allow you to pause the workflow at any time so you can return to it later.

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 action wheel beside your paused workflow

The screenshot shows the ClientTrack interface for Selena Gomez (Client ID: 731, Birth Date: 1/1/1991). The 'Paused Workflows' section is active, displaying a table of paused workflows. A dropdown menu is open over the 'Resume' button for the 'HMIS 2014 Program Data' workflow.

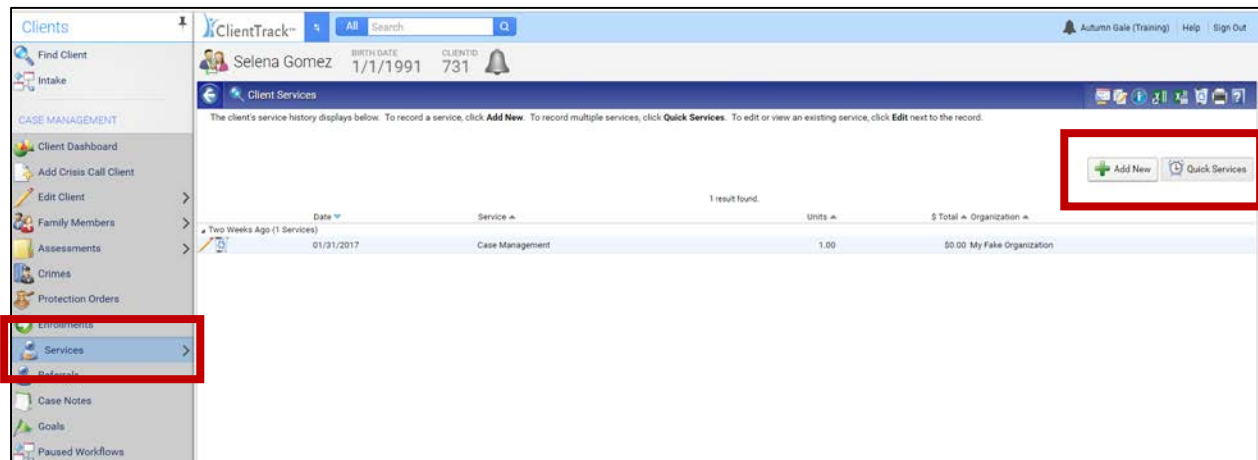
Workflow	Description	Started	Accessed
HMIS 2014 Program Data	Gomez, Selena	02/04/2017	02/04/2017 1:56PM

The dropdown menu options are: Resume, Restart, and Delete Paused Workflow.

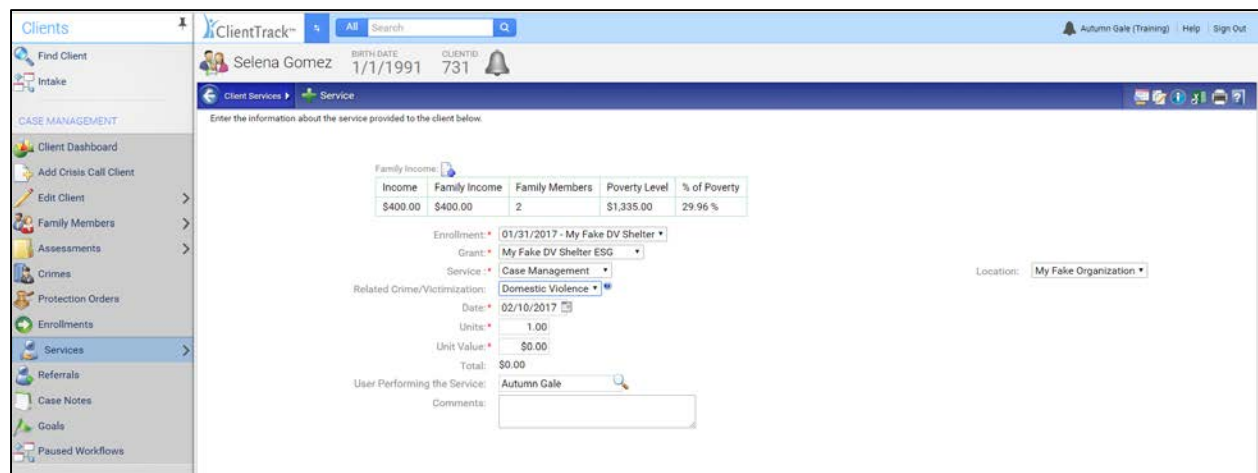
to select **“Resume”** in the drop down. This will take you back to where you paused the workflow and you can finish your program enrollment.

ADDING SERVICES

After completing an enrollment for a client, you can document services associated with the program enrollment with the **“Services”** link located in the list of case management tools on the left-hand side of the client record. This will open the Services window where you can **“Add New”** services or manage current services.



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 and dollar amounts (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 for writing 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.



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 edit or delete a service you created.

QUICK SERVICES

When you need to add more than one service and the services were provided on the same date, you can use the **“Quick Services”** option to document all of the services at the same time. The **“Quick Services”** button is located beside the **“Add New”** button on the Services home screen. With this feature you can add multiple services to a client record at one time by selecting the **“Grant”** and **“Enrollment.”** Then check the services with the **“Check Box”** next to the service you provided. If you need services added to the list of options, contact the DV Help Desk and a technician can customize that information for your agency.

Use the **Service Screen** list to filter services available. You may also filter services available by **Grant** and/or **Provider**. Select the services the client has received and verify the **Units** and **Unit Values**.

Service Screen: Direct Services

Family Income:				
Income	Family Income	Family Members	Poverty Level	% of Poverty
\$400.00	\$400.00	2	\$1,335.00	29.96 %

Date: 02/10/2017
Grant: My Fake DV Shelter ESG
Provider Name: My Fake DV Shelter ESG
Related crime/victimization: Domestic Violence
Enrollment: 01/31/2017 - My Fake DV Shelter
User Performing the Service(s): Autumn Gale
Location: My Fake Organization

2 results found.

Service	Unit Type	Units	Unit Value	Total	Restriction
Case Management (0)	Hours	1.00	\$0.00	\$0.00	Restrict to MOU/Info Release
Crisis Intervention	Count	1.00	\$0.00	\$0.00	Restrict to MOU/Info Release
		2.00	\$0.00	\$0.00	

Once you are finished adding multiple services click on the **“Save & Close”** button and you will return to the Services home screen where you can view and manage all services.

CASE NOTES

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, services, 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.***

ClientTrack™

Client: Selena Gomez BIRTH DATE: 1/1/1991 CLIENTID: 731

Client Case Notes Case Note with Services

Complete case note: **Entry Date**. Verify the **User** recording the note. Enter a brief title or description for the note in **Regarding**. Complete the case note in the text 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.

Entry Date: 02/10/2017
User: Autumn Gale
Regarding: Intake

Template: Case Note

Case Note
Client Name: Selena Gomez
Met with the client to conduct intake...

You can also document a service simultaneously while documenting a case note (see below). Just select the enrollment from the drop down box and add the service associated with the case note. Templates can also be set up for housing plans or any other specific required documentation so it can easily be drafted as a case note. Notify the help desk with any template requests.

Referrals Case Notes Goals Paused Workflows

Design HTML Preview

Read Only

Services - Use the fields below to record the services provided in association with the note above.
Default Enrollment: 01/31/2017 - My Fake DV Shelter

Grant	Service	Units Of Measure	Unit Value	Units	Total
My Fake DV Shelter ESG	Case Management	Hours	\$0.00	1.00	\$0.00
-SELECT-	-SELECT-	-SELECT-			\$0.00

Save Cancel

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 binoculars beside the case note to review it. 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.

ClientTrack™

Client: Selena Gomez BIRTH DATE: 1/1/1991 CLIENTID: 731

Client Case Notes

The client's case note history displays below. To create a new case note, click **Add New**. To view a case note, click **View Case Note** next to the record. To preview and print case notes, check the **Print** box next to one or more case notes, add them, click **Print Selected**.

Print	Date	Regarding	User	Organization
<input checked="" type="checkbox"/>	02/10/2017	Intake	Autumn Gale	My Fake Organization

1 result found.

Add New Print Selected

UPDATE/ANNUAL ASSESSMENT

For clients who spend longer periods of time in your program or to document any changes in your client's status since entry, you can conduct an **"Update/Annual Assessment"** formerly known as the During Program Enrollment Assessment. This assessment is required if clients are enrolled in your program for a year or longer, and some programs like SSVF require more frequent assessments so be sure to check your program requirements for the Update/Annual Assessment.

The Update/Annual Assessment is also helpful for tracking significant changes to a household – for example a client gets a job and the income changes, a client receives his/her GED, or a baby is born and needs to be added to the household and enrollment. For your convenience, the assessment has been developed as a workflow with the following steps:

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

The screenshot shows the ClientTrack interface for Selena Gomez. The left sidebar contains navigation options like 'Find Client', 'Intake', and 'CASE MANAGEMENT'. The main area displays 'Selena Gomez's Information' with fields for Name, Birth Date, Gender, Ethnicity, etc. Below this is a table of 'Selena's Enrollments'. A dropdown menu is open over the first enrollment, with 'Update/Annual Assessment' highlighted in a red box. Other options include 'Edit Enrollment Workflow', 'Add Family Member', 'Associated Assessments', 'Exit the Enrollment', 'Review Entry Assessments', and 'Delete Enrollment'.

The first screen in the Update/Annual Workflow will be a review of the household members and their program enrollment. Click **"Save"** to continue in the workflow.

This screenshot shows the 'Assessment For Enrollment' screen. It features a sidebar with a list of household members: Gomez, Selena, and Bieber, Justin. The main area has a question mark icon and the text 'New or Update Existing for this Client are you'. There are two buttons: 'New Assessment' and 'Update Existing'.

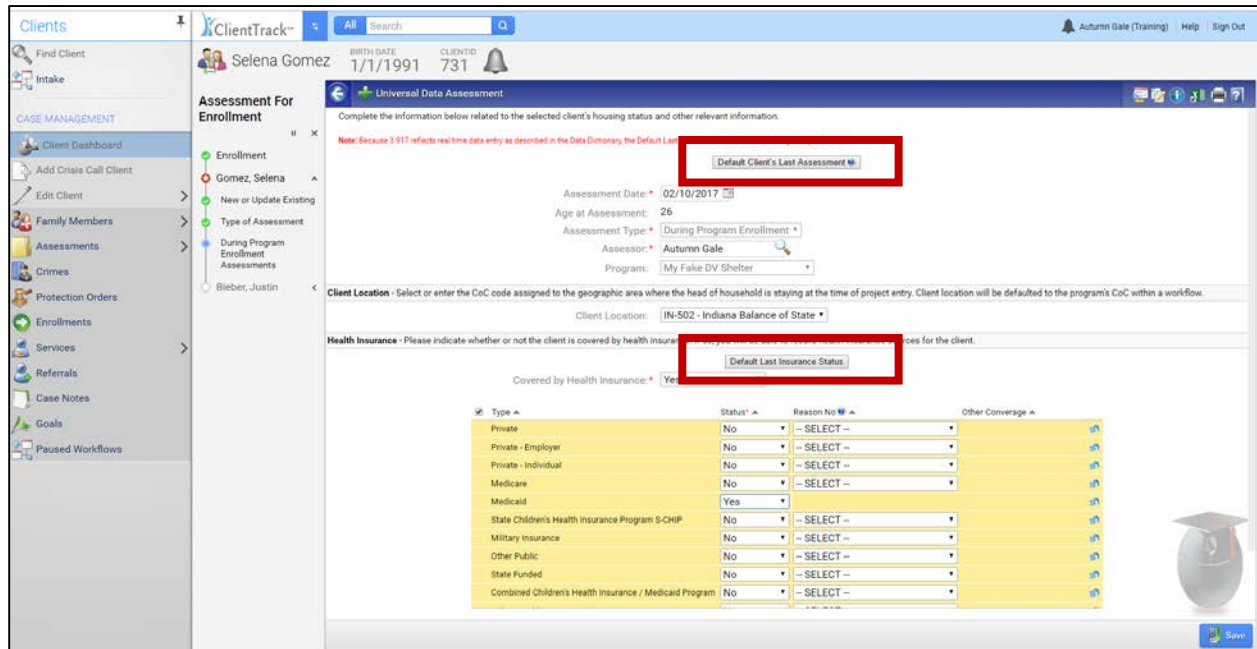
This screenshot shows the 'Assessment For Enrollment' screen with the 'Type of Assessment' dropdown menu open. The dropdown menu has two options: 'During Program Enrollment' and 'Annual'.

When the Update/Annual Assessment workflow is prompted, you will review case members and then be asked if you want to complete a **"New Assessment"** or **"Update Existing."** Select **"New Assessment"** on this screen. Then you will be asked if you wish to

complete a **"During Program Enrollment"** or an **"Update"** assessment. Select the appropriate assessment type and proceed through workflow.

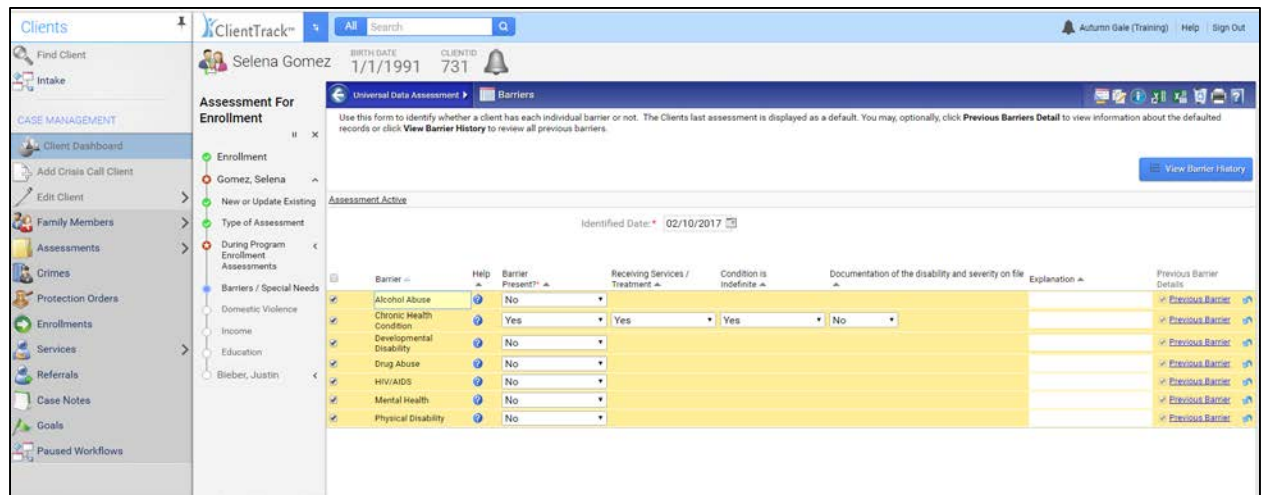
HMIS UNIVERSAL DATA ASSESSMENT FOR UPDATE/ANNUAL WORKFLOW

Review the head of household’s universal data and document any changes. Please note that you can change the assessment date at the top of the screen to reflect the actual date of the assessment if entered at another time.



HMIS BARRIERS ASSESSMENT FOR UPDATE/ANNUAL WORKFLOW

Review the HMIS Barriers and make any changes necessary. It will populate all of the information previously entered. If no barriers are present, click **“Save & Close”** to move forward in the workflow.



DV ASSESSMENT FOR UPDATE/ANNUAL WORKFLOW

Complete all of the required information for the Domestic Violence Assessment. You can use the **“Default Last Assessment”** button to populate the information that was entered at entry. This is a helpful feature to quickly enter data if the information has not changed.

The screenshot shows the ClientTrack interface for Selena Gomez. The main form is titled 'Domestic Violence Assessment of Victim'. A red box highlights the button 'Default Client's Last Assessment'. The form contains the following fields:

- Assessment Date: 02/10/2017
- Is client a victim of domestic violence: Yes
- When Exp Occurred: Within the past three months
- Currently Fleeing: No
- Victimization Date: 01/30/2017
- Victimization Type: Primary Victimization
- Age at Time of Incident: 26
- Interviewer: [Empty]
- Assessment Description: [Empty]
- Interview Type: In-Person, Phone Call Only

Click **“Next”** to move through the DV Assessment and then click **“Finish”** to continue through the workflow.

The screenshot shows the ClientTrack interface for Selena Gomez. The main form is titled 'Other Information and Offender's Relationship to Victim'. The form contains the following fields:

- Child Abuse:
- Physical Abuse:
- Psychological Abuse:
- Child Witnessed Abuse:
- Abuse through Neglect:
- Other Type of Abuse: Harassment
- Offender's Relationship to Victim: Intimate Partner

The screenshot shows the ClientTrack interface for Selena Gomez. The main form is titled 'Legal / Crime Information'. The form contains the following fields:

- Law Enforcement Called: Yes
- Abuser Arrested: Yes
- Incident Report Filed: Yes
- Signer of Report: Victim
- Legal / Resolution - Please check all that apply:
 - Criminal Complaint Filed:
 - Went to Court:
 - Convicted:
 - Civil Resolution:
 - No Legal Resolution:
 - Restriction: Restrict to Organization, Restrict to MOU/Info Release

FINANCIAL ASSESSMENT FOR UPDATE/ANNUAL WORKFLOW

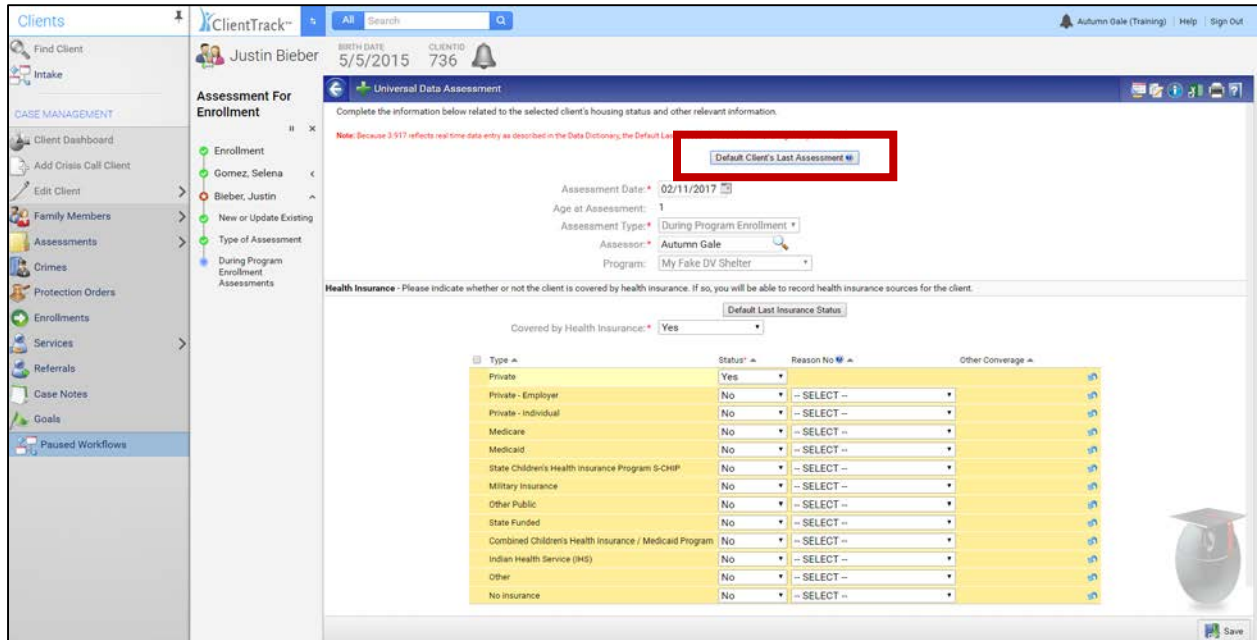
Review the Financial information for the head of household and document any changes to the household income. You can use the **“Default Last Assessment”** button to populate the information that was entered at entry. Be sure to scroll down to complete Non-Cash Benefits and click **“Save and Close”** when finished.

ADULT EDUCATION ASSESSMENT FOR UPDATE/ANNUAL WORKFLOW

Complete the Adult Education Assessment. Remember that all fields with an **asterisk *** are required. The **“Default Client’s Last Assessment”** will populate information from the previous assessment completed and is helpful if the client’s information has not changed. Click **“Save”** when finished.

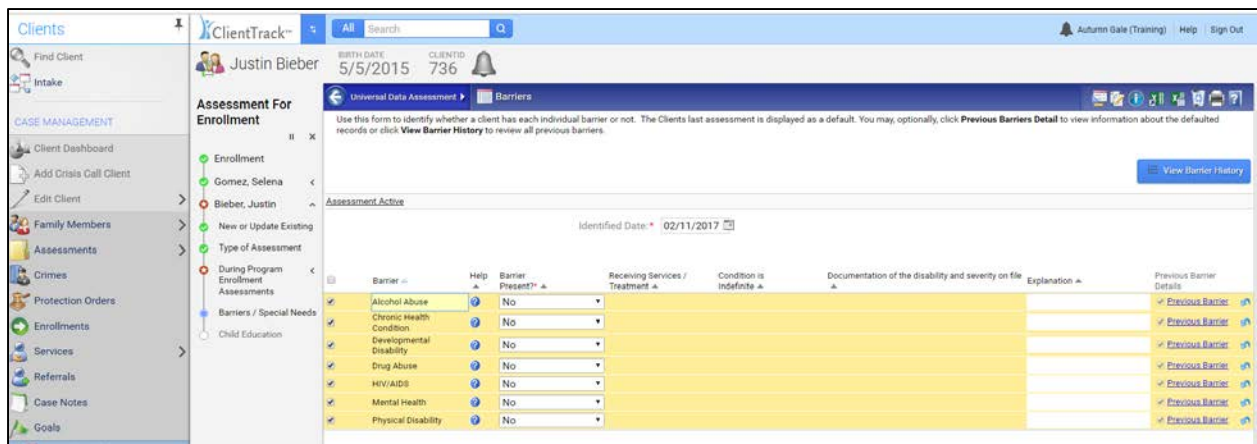
HMIS UNIVERSAL DATA ASSESSMENT FOR CHILD AT UPDATE/ANNUAL

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.



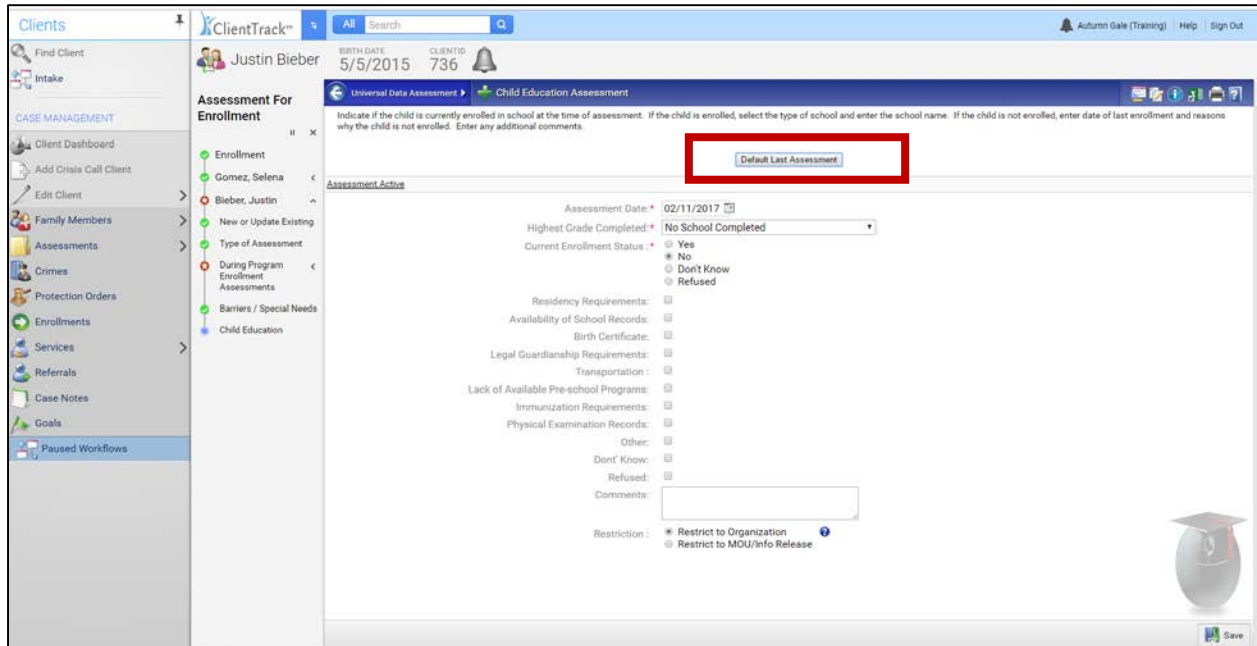
HMIS BARRIERS ASSESSMENT FOR CHILD AT UPDATE/ANNUAL

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



CHILD EDUCATION ASSESSMENT AT UPDATE/ANNUAL

Complete the Child Education Assessment for the child. You may use the **“Default Last Assessment”** button if there are no changes to the child’s education information. Click **“Save”** when completed.

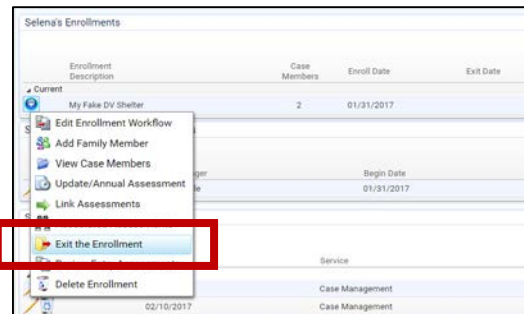


Once you have completed the required entry assessments for your client and household members, you will be prompted to **“Finish”** the workflow. If the workflow is complete then click **“Finish.”** You will then be directed back to the head of household’s client record.

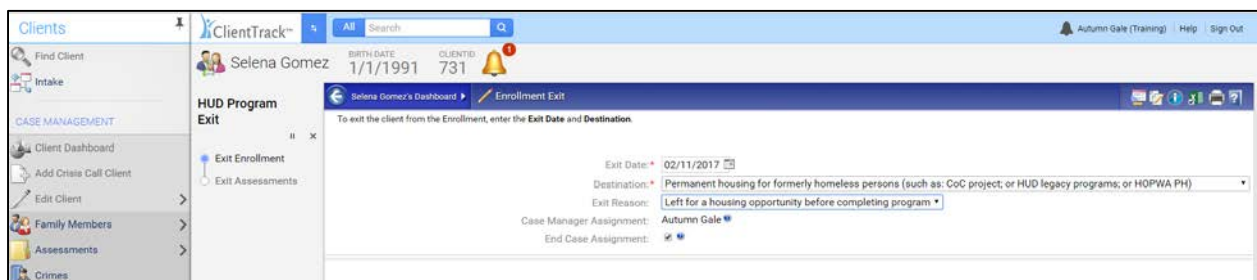
PROGRAM DISCHARGE

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

- Go to the client record;
- Click on the blue action wheel 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 for through the Exit workflow and save as you go.



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.



HMIS UNIVERSAL DATA ASSESSMENT FOR EXIT WORKFLOW

Complete the required information and click **“Save”** to continue.

The screenshot shows the 'Universal Data Assessment' form for Selena Gomez. The form includes fields for Assessment Date (02/11/2017), Age at Assessment (26), Assessment Type (Exit), Assessor (Autumn Gale), and Program (My Fake DV Shelter). Below these is a 'Health Insurance' section with a table for recording various insurance types.

Type	Status	Reason No	Other Coverage
Private	No	--SELECT--	<input type="checkbox"/>
Private - Employer	No	--SELECT--	<input type="checkbox"/>
Private - Individual	No	--SELECT--	<input type="checkbox"/>
Medicare	No	--SELECT--	<input type="checkbox"/>
Medicaid	Yes		<input type="checkbox"/>
State Children's Health Insurance Program S-CHIP	No	--SELECT--	<input type="checkbox"/>
Military Insurance	No	--SELECT--	<input type="checkbox"/>
Other Public	No	--SELECT--	<input type="checkbox"/>
State Funded	No	--SELECT--	<input type="checkbox"/>
Combined Children's Health Insurance / Medicaid Program	No	--SELECT--	<input type="checkbox"/>
Indian Health Service (IHS)	No	--SELECT--	<input type="checkbox"/>
Other	No	--SELECT--	<input type="checkbox"/>
No Insurance	No	--SELECT--	<input type="checkbox"/>

HMIS BARRIERS ASSESSMENT FOR EXIT WORKFLOW

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.

The screenshot shows the 'Barriers' assessment form for Selena Gomez. It includes a table for identifying individual barriers with columns for Barrier, Help, Barrier Present, Receiving Services/Treatment, Condition is Indefinite, Documentation of the disability and severity on file, Explanation, and Previous Barrier Details.

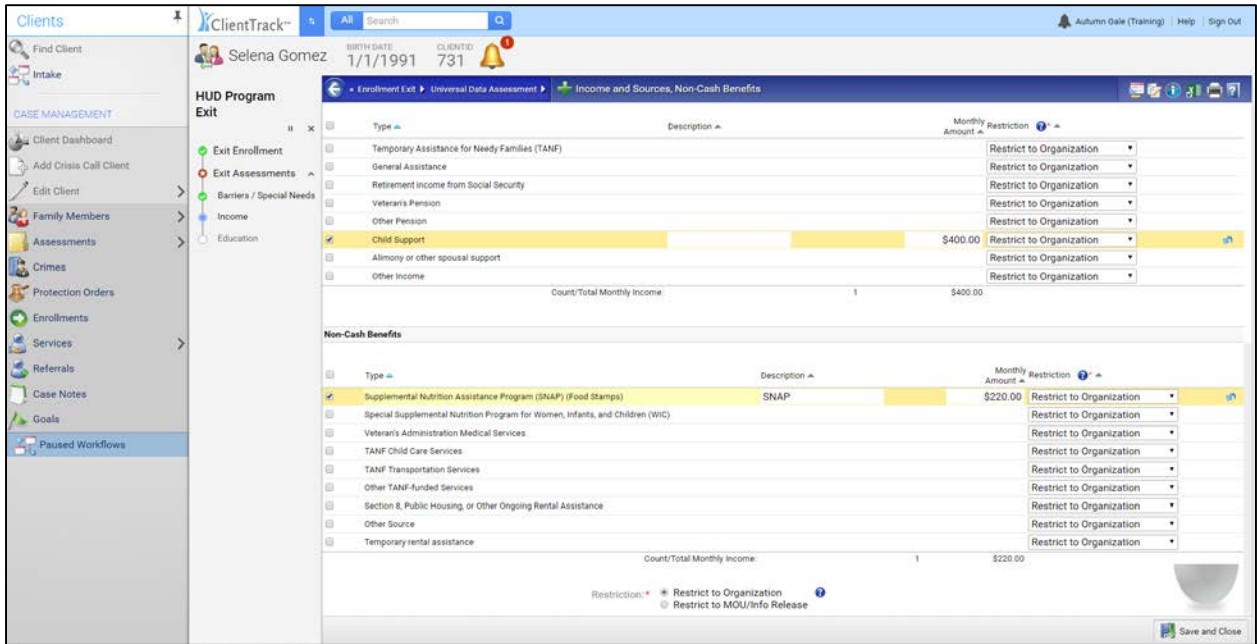
Barrier	Help	Barrier Present	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
<input checked="" type="checkbox"/> Alcohol Abuse	<input type="checkbox"/>	No					Previous Barrier
<input checked="" type="checkbox"/> Chronic Health Condition	<input type="checkbox"/>	Yes	Yes	Yes	No		Previous Barrier
<input checked="" type="checkbox"/> Developmental Disability	<input type="checkbox"/>	No					Previous Barrier
<input checked="" type="checkbox"/> Drug Abuse	<input type="checkbox"/>	No					Previous Barrier
<input checked="" type="checkbox"/> HIV/AIDS	<input type="checkbox"/>	No					Previous Barrier
<input checked="" type="checkbox"/> Mental Health	<input type="checkbox"/>	No					Previous Barrier
<input checked="" type="checkbox"/> Physical Disability	<input type="checkbox"/>	No					Previous Barrier

FINANCIAL ASSESSMENT FOR EXIT WORKFLOW

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.

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
- **Pension From Former Job** – Income from a private employer or military retirement pay
- **Supplemental Security Income** – A federal program 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
- **VA Service-Connected 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
- **VA NonService-Connected Disability** - To assist wartime veterans in need whose non-service- connected disabilities are permanent and total preventing them from following a substantially gainful occupation.
- **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

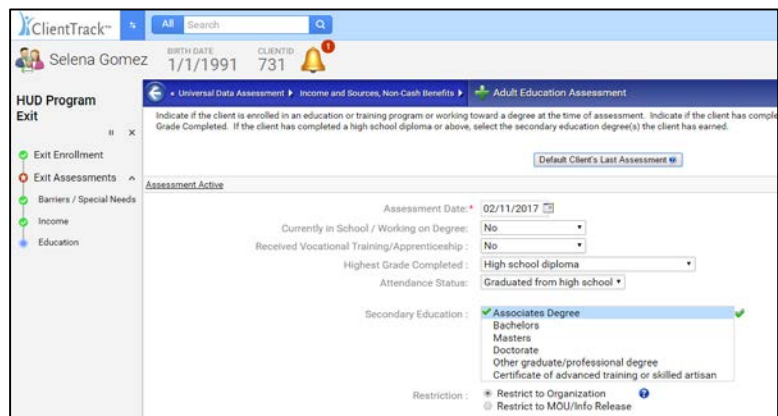


Definitions of Non-Cash Benefits

- **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 stores.
- **Special Supplemental Nutrition Program for Women, Infants and Children (WIC)** – A program geared toward supplying nutritional food for at risk pregnant women and their families.
- **TANF Child Care Services** – Child care funding assistance
- **Other TANF Funded Services**
- **Section 8, Public Housing or Other Rental Assistance (PSH)** – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development.
- **Temporary Rental Assistance (RRH)** – ESG rental assistance
- **Other Source** – Any source not previously listed above

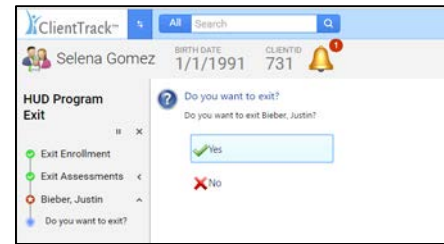
ADULT EDUCATION ASSESSMENT FOR EXIT WORKFLOW

Complete the Adult Education Assessment. Remember that all fields with an asterisk * are required. The “Default Client’s Last Assessment” will populate information from the previous assessment completed and is helpful if the client’s information has not changed. Click “Save” when finished.

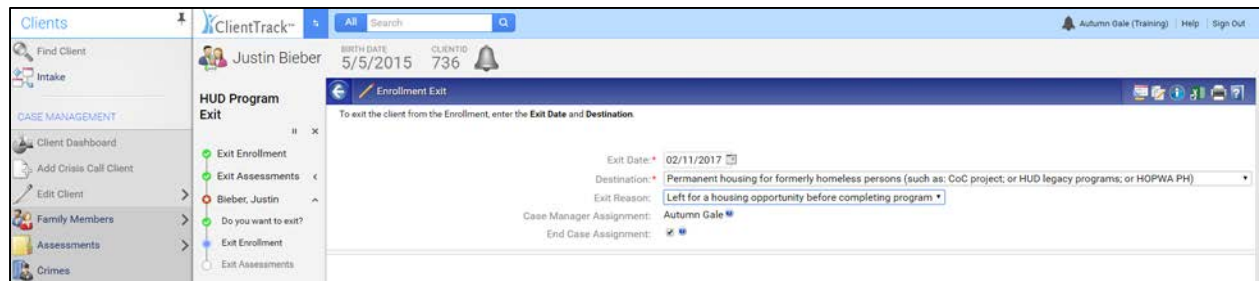


EXIT WORKFLOW FOR CHILDREN

After completing all of the exit assessments for the head of household, you will be asked if you wish to exit other case members as seen to the right. Complete the exit assessments for all exiting case members. If exiting only one case member, simply click “No” when asked to exit others. The adult exit assessments will look like the head of household’s assessments. The exit assessments will look differently for children.

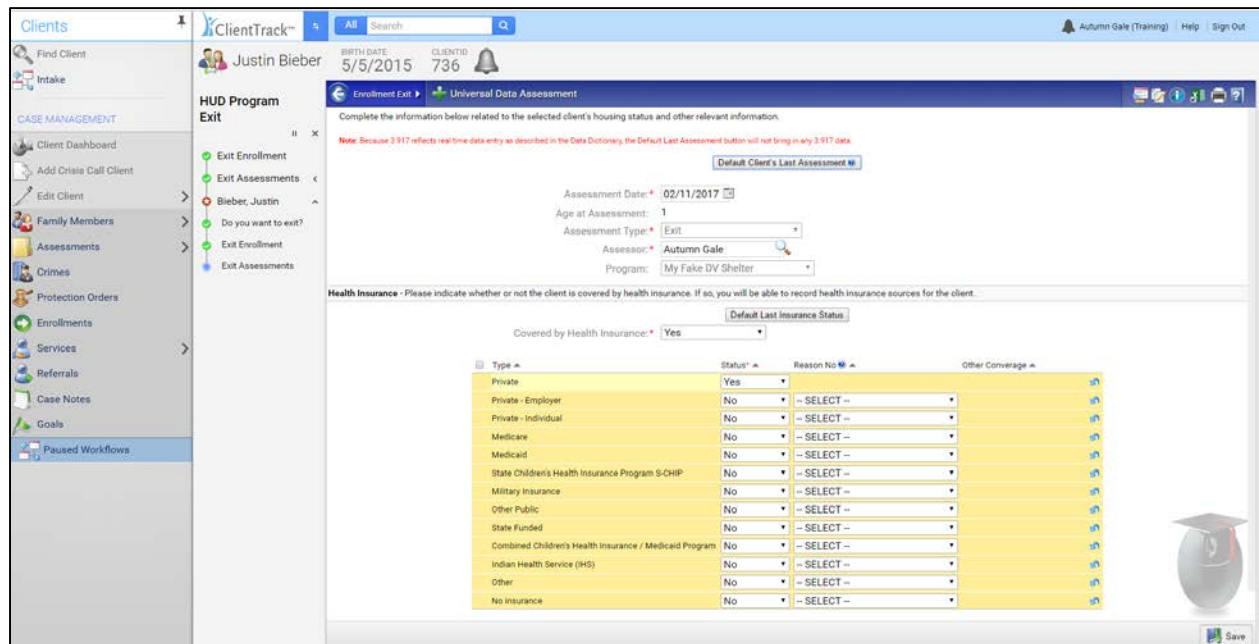


The “Exit Destination” and “Exit Reason” will be completed for all household members being discharged from the program.



HMIS UNIVERSAL DATA ASSESSMENT FOR CHILD AT EXIT

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



HMIS BARRIERS ASSESSMENT FOR CHILD AT EXIT

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

ClientTrack - Justin Bieber (BIRTH DATE: 5/5/2015, CLIENTID: 736)

HUD Program Exit

Enrollment Exit | Universal Data Assessment | Barriers

Use this form to identify whether a client has each individual barrier or not. The Client's last assessment is displayed as a default. You may, optionally, click **Previous Barriers Detail** to view information about the defaulted records or click **View Barrier History** to review all previous barriers.

Assessment Active

Identified Date: 02/11/2017

Barrier	Help	Barrier Present?	Receiving Services / Treatment	Condition is Indefinite	Documentation of the disability and severity on file	Explanation	Previous Barrier Details
Alcohol Abuse	?	No					Previous Barrier
Chronic Health Condition	?	No					Previous Barrier
Developmental Disability	?	No					Previous Barrier
Drug Abuse	?	No					Previous Barrier
HIV/AIDS	?	No					Previous Barrier
Mental Health	?	No					Previous Barrier
Physical Disability	?	No					Previous Barrier

CHILD EDUCATION ASSESSMENT AT EXIT

Enter the **“Highest Grade Completed”** for the child, and then select the child’s **“Current Enrollment Status.”** The built in logic may require additional information depending on how you answer the questions. **“Default Client’s Last Assessment”** will populate information from the previous assessment completed and is helpful if the client’s information has not changed. Click **“Save”** when completed.

ClientTrack - Justin Bieber (BIRTH DATE: 5/5/2015, CLIENTID: 736)

HUD Program Exit

Enrollment Exit | Universal Data Assessment | Child Education Assessment

Indicate if the child is currently enrolled in school at the time of assessment. If the child is enrolled, select the type of school and enter the school name. If the child is not enrolled, enter date of last enrollment and reasons why the child is not enrolled. Enter any additional comments.

Assessment Active

Assessment Date: 02/11/2017

Highest Grade Completed: No School Completed

Current Enrollment Status: Yes (selected), No, Don't Know, Refused

Residency Requirements: []

Availability of School Records: []

Birth Certificate: []

Legal Guardianship Requirements: []

Transportation: []

Lack of Available Pre-school Programs: []

Immunization Requirements: []

Physical Examination Records: []

Other: []

Don't Know: []

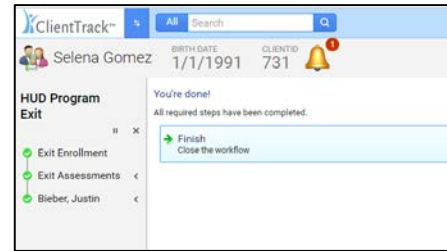
Refused: []

Comments: []

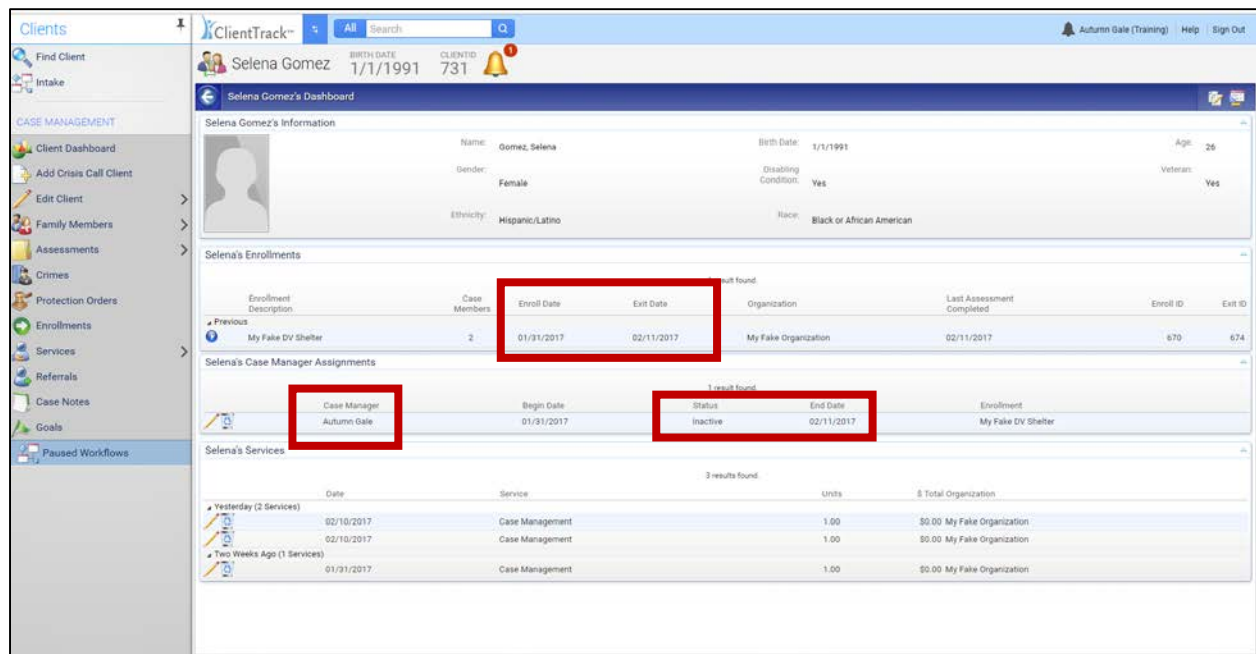
Restriction: Restrict to Organization (selected), Restrict to MOU/Info Release

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.



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 pencil beside your name under **“Case Manager Assignments”** to edit your status to **“Inactive”** to remove the discharged client from your case load.

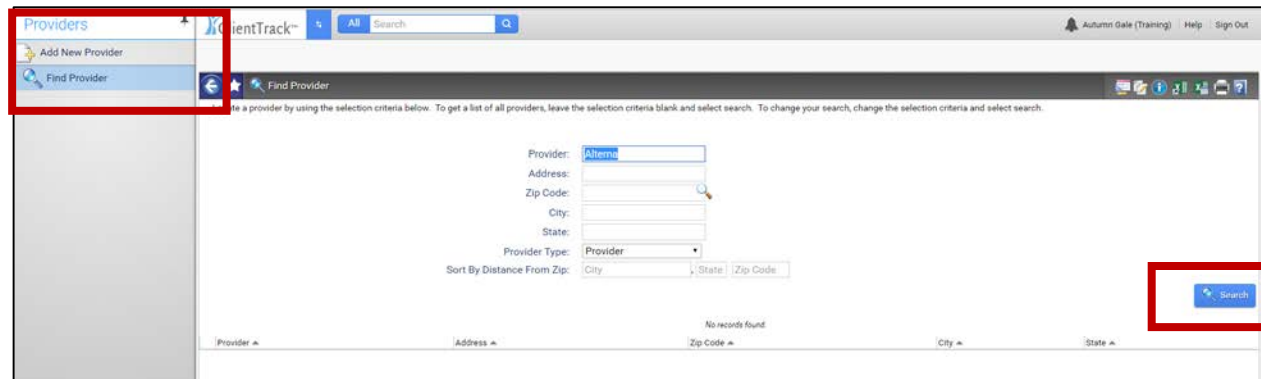
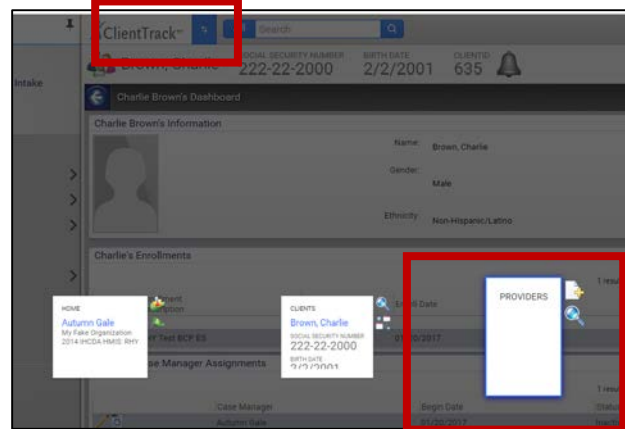


MANAGING PROVIDERS

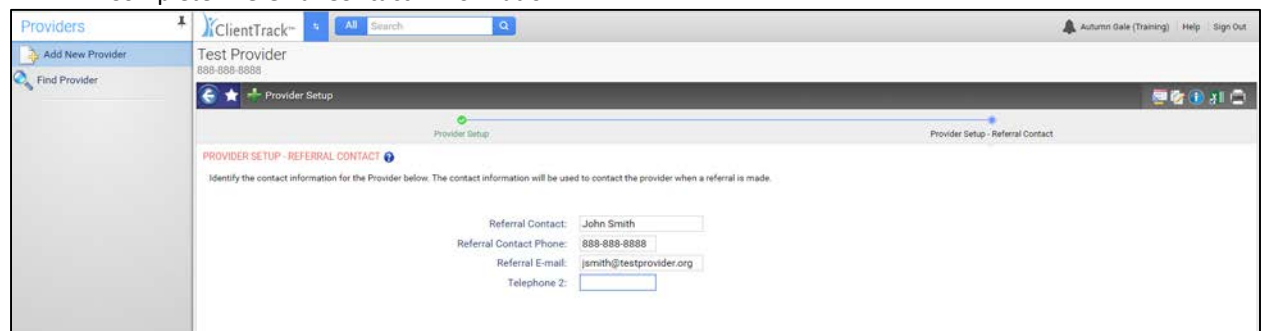
You can add providers (other agencies) you work with into a database to easily identify providers on services and/or referrals.

Follow these steps to add a provider to your database of providers:

- Click on the blue box with the white arrows beside the ClientTrack logo at the top of the screen to toggle to the “Providers” screen.
- Conduct a search for the Provider in the database by clicking on the “Find Provider” link in the upper left-hand corner of the screen.
- Click on the “Add New Provider” link if the Provider is not already in the system located below the “Find Provider” link in the upper left-hand corner of the screen.



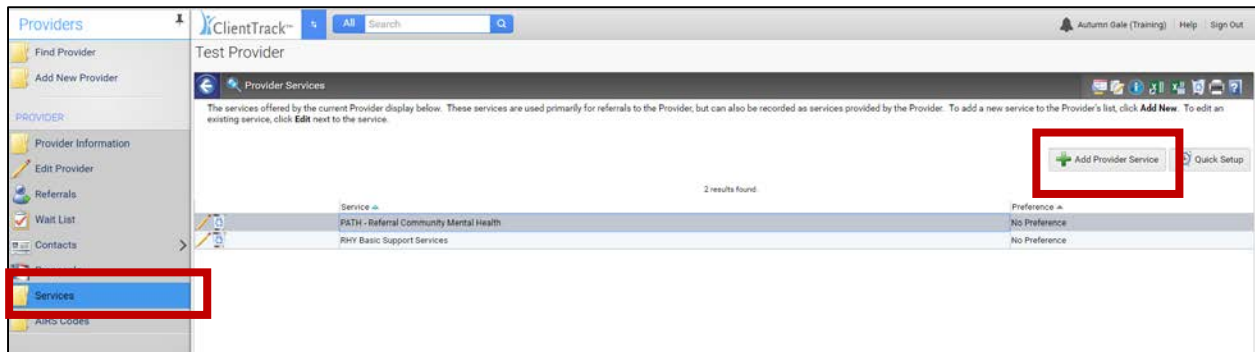
- Complete the provider information. You must complete information that has an asterisk * before continuing.
- Click “Next” in the bottom right-hand corner of the screen.
- Complete “Referral Contact” information.



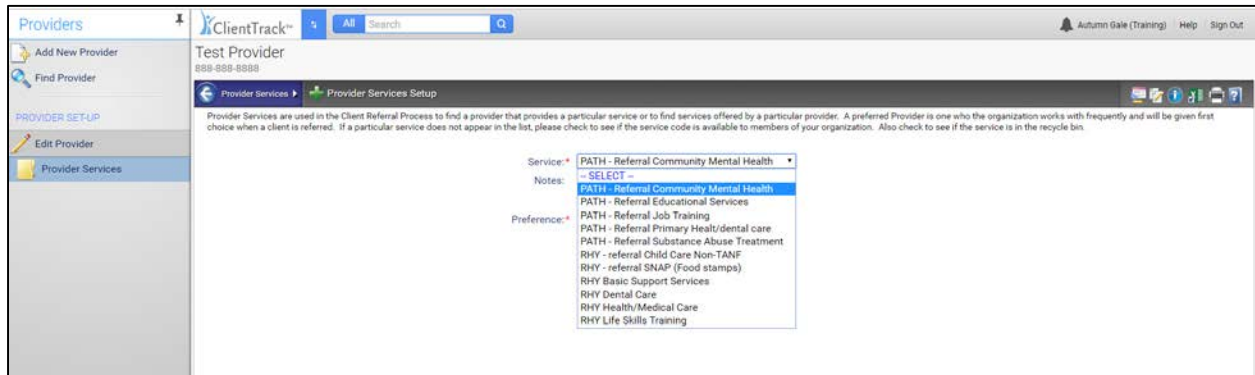
- Click on “Finish” to complete the addition of a Provider to your searchable list. You can go back to the previous screen if necessary by clicking on “Previous.”

After adding the provider to the provider database through the above steps, ***you need to complete one more step before you can access the provider when setting up referrals and services.***

You must correlate a service with the provider before the provider is available for services and referrals on a client record. You can do this by remaining on the provider record and clicking on **"Services"** in the list of Menu Items under **"Provider"** found on the left-hand side of the screen as seen below. Click on the **"Add Provider Service"** button on the right hand side of the screen.



Then select a service you want correlated with the provider and click **"Save"** to add the service to the provider record. You can add as many services as you would like by repeating these steps.



Once you have finished this final step, you will be able to select the provider when creating a referral or service on a client record.

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 program. 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 on the left-hand side 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.
- Hover on the **“Service Summary Reports”** folder 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.

The screenshot displays the 'Service Summary' report configuration page. On the left, a sidebar lists various report categories under 'MY CLIENTTRACK' and 'REPORTS'. The 'Service Reports' folder is expanded, showing 'Service Summary Reports' as the first option. The main content area shows the 'Service Summary' report configuration form. The form includes a 'Saved Report Settings' dropdown, a 'Predefined Date Range' set to 'Current Month', and a 'Service Date Between' range from '02/01/2017' to '02/28/2017'. The 'Organization(s)' section shows 'My Fake Organization' selected with a green checkmark. The 'Grant(s)', 'Services', and 'User(s)' sections each have a 'Filter by' button and a list of items to select. The 'Housing Status' section has a 'Filter by' button and a list of items to select. At the bottom, there are buttons for 'Report', 'Schedule Report', and 'Cancel'.

- Set up your report parameters by: *(Please note that all fields with an asterisk * are required fields)*
 - **Complete 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, 01/01/2016 and 12/31/2016. This will give you all of the clients in your program for the entire year of 2016.
 - **Filter by “Programs”** – Select the **“Program”** 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 program. You can run multiple programs on the same report. Simply select more than one **“Program”** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To deselect a program, simply click on it again and you will see the green check mark disappear.

- **Filter by “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 “Program(s)” you selected in the “Filter by Program(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.
- **Filter 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 deselect 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. You should see your Service Summary Report pop up in a new window within seconds. You can export your report to a pdf file for email transmission or record-keeping by clicking on the pdf icon in the upper right-hand corner of the report window.

ANNUAL PERFORMANCE REPORT (APR)

The APR is a comprehensive report of your program – 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.

To Run an APR:

- Click on “Reports” found in the list of options on the left-hand side of your User Dashboard, just below “My ClientTrack.”
- Hover over the “HMIS 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 “HMIS Reports” folder.

- Select “APR for CoC Grant-Funded Programs” link that appears first in the list of reports after hovering over it.
 - Set up your report parameters by: *(Please note that all fields with an asterisk * are required fields)*

- **Complete 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, 01/01/2016 and 12/31/2016. This will give you all of the clients in your program for the entire year of 2016.
- **Select the “Grant Program” and “Grant Program Component”** - Select the grant associated with your program with the drop down for **“Grant Program.”** This will prompt the next selection in **“Grant Program Component.”** If you do not know this information, feel free to try several selections to find the correct options for your program. You won't break it by choosing different options. If you do not see the correct set up information here, contact the DV Help Desk by emailing DVHelpDesk@ihedaonline.com
- **Select the “Grant(s)”** – You may see several options to choose from after selecting **“Grant Program”** and **“Grant Program Component.”** Again, the aforementioned Grant Program and Grant Program 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 to show that you have successfully selected a grant. You can run multiple grants on the same report. Simply select more than one **“Grant”** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To deselect one, simply click on it again and you will see the green check mark disappear.
- **Select the “Project Type”**- Select a project type with the drop down list that appears. You may only select one **“Project Type”** at a time. Please note that Project Type and Program must be selected to populate the final measurement on Q.36 of the report. You can run your report without selecting **“Project Type”** and **“Program,”** but the measurement on the last page will not populate data.
- **Filter by “Program(s)”** - Click on the name in the box and a green check mark will appear to show that you have successfully selected it. Multiple programs can be selected here as well like the **“Grant”** parameter. You can deselect a program by clicking on it again and the green check mark will disappear.
- Click on the **“Report”** button found in the bottom right-hand corner of the screen. You should see your report pop up in a new window within seconds.

To Drill Down and Find Missing Data

After your APR populates in a new window, you can review it by clicking on the blue arrows at the top of the report window. It is important to review your APR and see what sections (if any) of the report show **“Missing”** data. If a section of the report indicates there is missing data, follow these steps to identify which clients are reporting that missing information:

- Click on the **blue link** for that section heading 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 DV Help Desk for assistance.***
- Another window will 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 an Excel Spreadsheet to find the missing data in a more detailed, organized format.
- To export the client data to an Excel Spreadsheet, click on the **Excel icon with the gold spindle** in the upper right-hand corner of the report window. You will be asked to **“Open”** or **“Save”** the spreadsheet, select **“Open”** to review the data. ***Be sure to clear your downloads in your Internet browser after exporting client data.***
- You will see the word **“MISSING”** on the spreadsheet where clients 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.

To Complete or Edit Missing Data

In unusual cases, there may be a missing enrollment ID for an entry or exit of a client. You can complete the entry and/or exit assessments after a technician has set up the master assessment for you. If you need assistance with setting up the master assessment, contact the DV Help Desk at DVHelpDesk@ihcdaonline.com. Follow these steps to complete missing data on the assessments with enroll and exit IDs:

- Go to the client's record who is reported as missing the data on the APR.
- Click on the blue action wheel beside your program enrollment found on the client dashboard under "**[Client Name] Enrollments**" located centrally on the client's record.
- Select "**Review Entry Assessments**" or "**Review Exit Assessments**" (depending on which one you need to complete) in the drop down list that appears after clicking on the blue action wheel.
- Complete the missing data by clicking on the little notepad beside the appropriate assessment listed.
- Save as you edit or complete assessments by scrolling down on the assessment screen and clicking on "**Save.**"
- Blue check marks will appear to indicate an assessment is completed.

When you have completed the missing data on client records, run your APR again to review it and ensure all missing data is resolved. Please don't hesitate to contact the DV Help Desk if you need any assistance with your report or completing missing data.