

How to Guide: HMIS/DV CLIENTTRACK COVID – 19 Intake

Effective 4/2/2020

THE COVID-19 INTAKE FUNCTION IS FOR NEW HMIS/DV CLIENTTRACK CLIENTS ONLY! FOR EXISTING HMIS/DV CLIENTTRACK CLIENTS, PLEASE SEE THE “HOW TO GUIDE” FOR THE COVID-19 SCREENING ASSESSMENT.

From the “Clients” workspace: Complete a “Find Client” search to determine if the client has an existing HMIS/DV CLIENTTRACK record. If no existing client record is found, proceed to Step 1.

1. **Select** (click on) “COVID-19 Intake” located in the menu on the left-hand side of the screen.

The screenshot shows the ClientTrack interface. On the left-hand side, there is a dark blue sidebar menu. The 'Clients' menu item is highlighted with a red box. Below it, the 'COVID-19 Intake' menu item is highlighted with a red arrow. The main content area displays the profile of a client named 'Friday, Fast' with a client ID of 3336. The profile includes a photo placeholder, name, birth date (1/1/1990), age (30), gender (Male), ethnicity (Hispanic/Latino), and race (Asian, White). Below the profile, there are sections for 'Fast's Enrollments' and 'Fast's Services'. The 'Fast's Enrollments' section shows 2 results found, including 'Exited' and 'Coordinated Entry'. The 'Fast's Services' section shows 2 results found, including 'Last Week (2 Services)' with a table of services.

2. **Select “Add a new client”** to create a new Client record for a client with no existing HMIS/DV CLIENTTRACK record.

The screenshot shows the ClientTrack interface with the 'COVID-19 Screening' dialog box open. The dialog box has a title bar that says 'Add or Edit' and a question mark icon. Below the title bar, it asks 'Do you want to add a new client or use the selected client?'. There are three options: 'Add a new client' (highlighted with a red arrow), 'Use the current client', and 'Select another client'. The 'Add a new client' option is a button with a plus sign icon.

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3. Enter the client's **First and Last Name, Social Security Number** and **Birth Date** then click **"Next"**.

The screenshot shows the ClientTrack COVID-19 Screening interface. The left sidebar has 'COVID-19 Screening' selected. The main area is titled '+ Client Information' and shows a progress bar with 'Search Existing Clients' as the current step. Below the progress bar, there is a section titled 'Search Existing Clients' with instructions: 'The first step in adding a new client is to search existing client records for possible matches to avoid duplicate entry. Enter partial identifying information on the client, and then click Next to search from existing client records.' Below the instructions are four input fields: 'First Name:', 'Last Name:', 'Social Security Number:', and 'Birth Date:'. A red box highlights these four input fields. At the bottom right of the main area, there is a blue button labeled 'Next' with a right arrow, also highlighted by a red box.

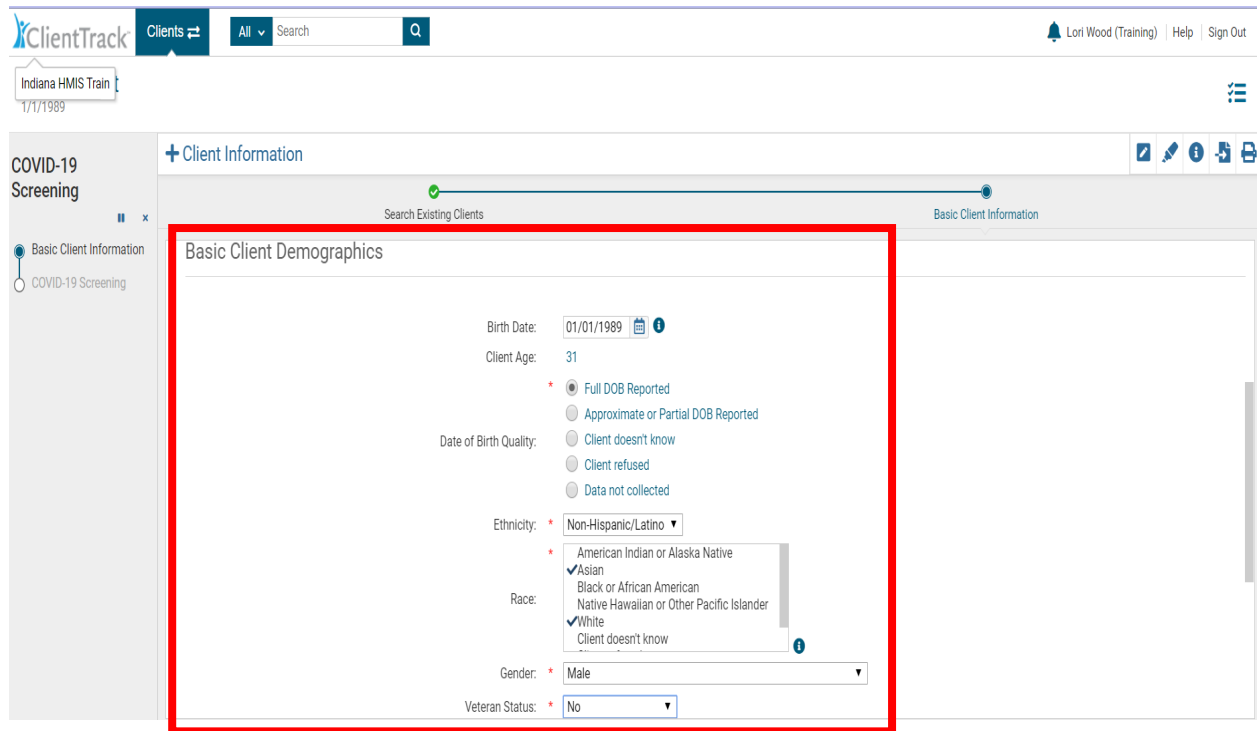
4. Complete the **"Basic Client Information"** fields.

The screenshot shows the ClientTrack COVID-19 Screening interface. The left sidebar has 'COVID-19 Screening' selected. The main area is titled '+ Client Information' and shows a progress bar with 'Basic Client Information' as the current step. Below the progress bar, there is a section titled 'Basic Client Information' with instructions: 'Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.' Below the instructions are several input fields: 'First Name: * Newt', 'Last Name: * Name', 'Middle Name:', 'Suffix:', 'Name Quality: * Full name reported' (with a dropdown arrow), and 'Social Security Number: 333 44 5555' (with a dropdown arrow). A red box highlights the 'First Name', 'Last Name', 'Middle Name', 'Suffix', 'Name Quality', and 'Social Security Number' fields. Below the 'Basic Client Information' section, there is a section titled 'Basic Client Demographics'.

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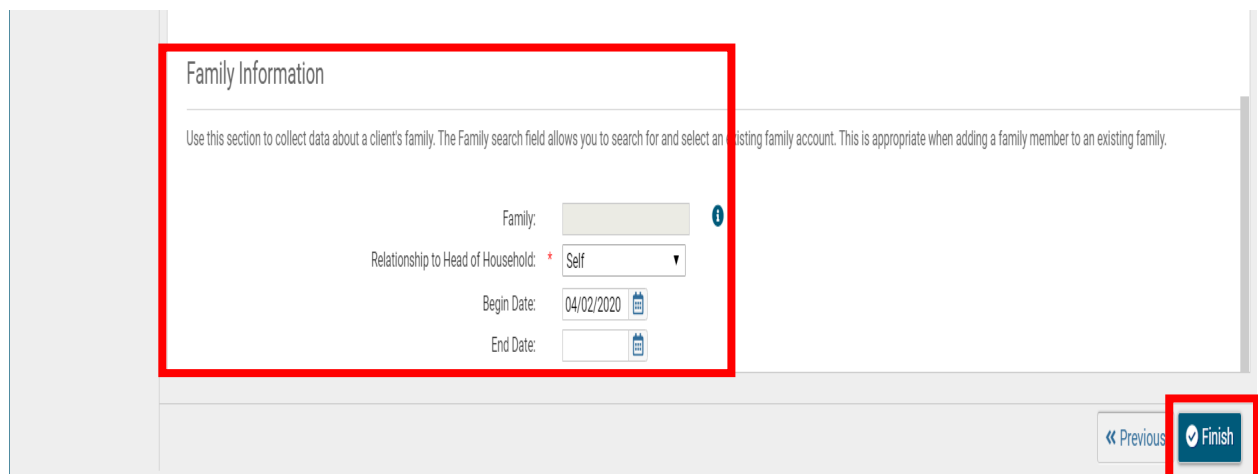
5. Complete the **“Basic Client Demographics”** fields.



The screenshot shows the ClientTrack interface. The top navigation bar includes the ClientTrack logo, a 'Clients' tab, a search bar, and user information (Lori Wood (Training) | Help | Sign Out). The left sidebar shows 'COVID-19 Screening' and 'Basic Client Information'. The main content area is titled 'Basic Client Demographics' and is highlighted with a red border. The form includes the following fields:

- Birth Date: 01/01/1989
- Client Age: 31
- Date of Birth Quality: ☒ Full DOB Reported, ☐ Approximate or Partial DOB Reported, ☐ Client doesn't know, ☐ Client refused, ☐ Data not collected
- Ethnicity: ☒ Non-Hispanic/Latino, ☐ American Indian or Alaska Native, ☐ Asian, ☐ Black or African American, ☐ Native Hawaiian or Other Pacific Islander, ☐ White, ☐ Client doesn't know
- Race: ☒ Asian, ☐ Black or African American, ☐ Native Hawaiian or Other Pacific Islander, ☒ White, ☐ Client doesn't know
- Gender: ☒ Male, ☐ Female
- Veteran Status: ☒ No, ☐ Yes

6. Review the **“Family Information”** fields then click **“Finish”**



The screenshot shows the ClientTrack interface. The main content area is titled 'Family Information' and is highlighted with a red border. The form includes the following fields:

- Family: [Search field]
- Relationship to Head of Household: ☒ Self, ☐ Spouse, ☐ Child, ☐ Parent, ☐ Other
- Begin Date: 04/02/2020
- End Date: [Date field]

At the bottom right of the form, there are two buttons: 'Previous' and 'Finish'. The 'Finish' button is highlighted with a red border.

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7. **IMPORTANT NOTE: Please READ the “Before You Start” warning below**

The screenshot shows the ClientTrack interface for a COVID-19 screening. The top navigation bar includes the ClientTrack logo, a 'Clients' dropdown, a search bar, and user information for 'Lori Wood (Training)'. The main header displays the client's name 'Name, Newt', birth date '1/1/1989', and client ID '3379'. The left sidebar shows 'COVID-19 Screening' as the active section. The main content area is titled '+ COVID-19 Screening' and contains a 'COVID-19 Screening Tool' section. A red-bordered box highlights the 'Before you start...' warning, which states: 'Stop and call 911 if client presents with any of these symptoms:'. Below this, a list of symptoms is provided: 'Constant chest pain or pressure', 'Extreme difficulty breathing', 'Severe, constant dizziness or lightheadedness', 'Slurred speech', 'Difficulty waking up', and 'Blueish Lips or Face'. A table below the list compares COVID-19 symptoms (Fever, Cough, Shortness of Breath) with Flu symptoms (Fever, Cough, Sore Throat, Headaches, Body, Muscle Aches, Runny, Stuffy Nose, Fatigue) and Allergies symptoms (Sneezing, Coughing, Runny Nose, Scratchy Throat, Itchy, Red Watery Eyes).

COVID-19 Screening Tool

Before you start... Stop and call 911 if client presents with any of these symptoms:

- Constant chest pain or pressure
- Extreme difficulty breathing
- Severe, constant dizziness or lightheadedness
- Slurred speech
- Difficulty waking up
- Blueish Lips or Face

First, become familiar with symptoms of COVID-19 and how they differ from the Flu and allergies.

COVID-19	FLU	ALLERGIES
Fever Cough Shortness of Breath	Fever Cough Sore Throat Headaches Body, Muscle Aches Runny, Stuffy Nose Fatigue	Sneezing, Coughing Runny Nose, Scratchy Throat Itchy, Red Watery Eyes

8. Next, click on the “Magnifying Glass” displayed under “Assessment – No Assessment Selected”.

The screenshot shows the ClientTrack interface for a COVID-19 screening. The top navigation bar includes the ClientTrack logo, a 'Clients' dropdown, a search bar, and user information for 'Lori Wood (Training)'. The main header displays the client's name 'Name, Newt', birth date '1/1/1989', and client ID '3379'. The left sidebar shows 'COVID-19 Screening' as the active section. The main content area is titled '+ COVID-19 Screening' and contains a 'COVID-19 Screening Tool' section. The 'Assessment' section is displayed, showing 'No Assessment Selected' with a magnifying glass icon. A red arrow points to the magnifying glass icon. Below the assessment section, the client's information is displayed: Name: Name, Newt, Age: 31, Social Security Number: 333-44-5555, Gender: Male, Home Phone: , and Email: .

Assessment:
No Assessment Selected

Name: Name, Newt
Age: 31
Social Security Number: 333-44-5555
Gender: Male
Home Phone:
Email:

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9. Click “Add New”

Search

Find Assessment

Use the criteria below to find the Assessment containing accurate data for the client. Only assessments created by your organization will be displayed below.

+ Add New

Assessment Date:

Type: -- SELECT --

Program:

User:

Comments:

Search

Cancel

10. Complete the “Assessment Date”, “Assessment Type” and “Program” from the drop-down lists.

11. Enter any pertinent comments in the “Comments” text box

12. Click “Save”

Add New

+ Master Assessment

A Master Assessment record ties together a number of separate, detailed assessments/data elements to a single process. For example, if you are creating an Entry Type Master Assessment, the data elements you record while this assessment is active will be tied to the entry.

Assessment Date: * 04/02/2020

Assessment Type: * During Program Enrollment

Program: * My Fake IHCDCA Coordinated Entry (R1)

Assessor: * Lori Wood

Comments

If you have any other comments or notes regarding this assessment, please enter them below.

Comments:

Restriction: * ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Save Cancel

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13. Complete the “Screening Information” fields. **NOTE: Additional fields may populate based upon the information disclosed by the client and entered in the system.** Example outlined in Green below: Client has a current temperature of 100.6 degrees fahrenheit.

ClientTrack Clients All Search Q

Lori Wood (Training) Help Sign Out

Name, Newt 1/1/1989 CLIENTID 3379

COVID-19 Screening

Screening Information

Screening Date: 04/02/2020

Current Temperature: 100.6

Temperature Scale: Fahrenheit

The current temperature recorded suggests the client has a fever. You should provide a mask and monitor the client.

14. Select the client’s “Symptoms” from the drop-down box
15. Select the client’s “Existing Conditions” from the drop-down box
16. “Known exposure to COVID-19” if client answers “Yes”, please click the check box
17. “Previously Tested” if client answers “Yes”, please click the check box

ClientTrack Clients All Search Q

Lori Wood (Training) Help Sign Out

Indiana HMIS Train Newt 1/1/1989 CLIENTID 3379

COVID-19 Screening

Symptoms:

- ✓Fever
- ✓Cough
- Shortness of Breath
- Tiredness
- Aches and Pains
- Nasal Congestion

Existing Conditions:

- Chronic Lung Disease
- Asthma
- Serious Heart Condition
- Immunocompromised (including cancer treatment)
- Severe Obesity (BMI >40%)
- ✓Diabetes

Known Exposure to COVID-19: ☒

Previously Tested: ☒

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18. Complete “Prior Test Date”
19. Select the “Prior Test Result” from the drop-down box
20. Select the “Current Test Status” from the drop-down box, then click “Save”

ClientTrack Clients All Search Q

Lori Wood (Training) Help Sign Out

Indiana HMIS Train Newt CLIENTID 3379

COVID-19 Screening

Prior Test

Prior Test Date: 03/25/2020

Prior Test Result: Negative

Current Test

Current Test Status: Sent

Should the client screen positive for these symptoms, it does not mean that they have the COVID-19 virus. They could have another type of flu, a common cold, or allergies. They should be provided with a mask and be isolated from other clients until a cause of symptoms is determined.

If client exhibits severe symptoms and they have other underlying conditions, call 911.

Save No Changes

21. To finish the assessment, please click “Finish”

ClientTrack Clients All Search Q

Lori Wood (Training) Help Sign Out

Name, Newt CLIENTID 3379

COVID-19 Screening

You're done!
All required steps have been completed.

Finish
Close the workflow

22. The **COVID-19 screening assessment** is now part of the client’s HMIS/DV CLIENTTRACK record. However, the **COVID-19 screening assessment** does not appear on the client’s Dashboard. **To view the completed COVID-19 assessment, click on “Other Assessments” located in the menu on the left-hand side of the screen. Next, click on “COVID-19 Screening”**

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The screenshot displays the ClientTrack interface for a client named 'Name, Newt' (CLIENTID 3379). The left sidebar shows the 'Other Assessments' menu with a red arrow pointing to 'COVID-19 Screening'. The main content area shows 'Newt Name's Information' with fields for Name, Birth Date, Age, Gender, Ethnicity, and Race. Below this are sections for 'Newt's Enrollments' and 'Newt's Services', both showing 'No records found.'

23. The screen will display a list of all COVID-19 screenings attached to the client's HMIS/DV CLIENTTRACK record. **To access a specific screening, click on the little blue pencil to the left of the screening you wish to review. The selected screening will appear.**

The screenshot displays the 'COVID-19 Screenings' list for client 'Name, Newt'. The list shows one screening on 04/02/2020 with a status of 'Sent'. A red box highlights the blue pencil icon next to the screening date. The left sidebar shows the 'COVID-19 Screening' menu item highlighted.

Please contact the help desk if you require additional assistance

HMISHelpDesk@ihcda.in.gov

DVHelpDesk@ihcda.in.gov