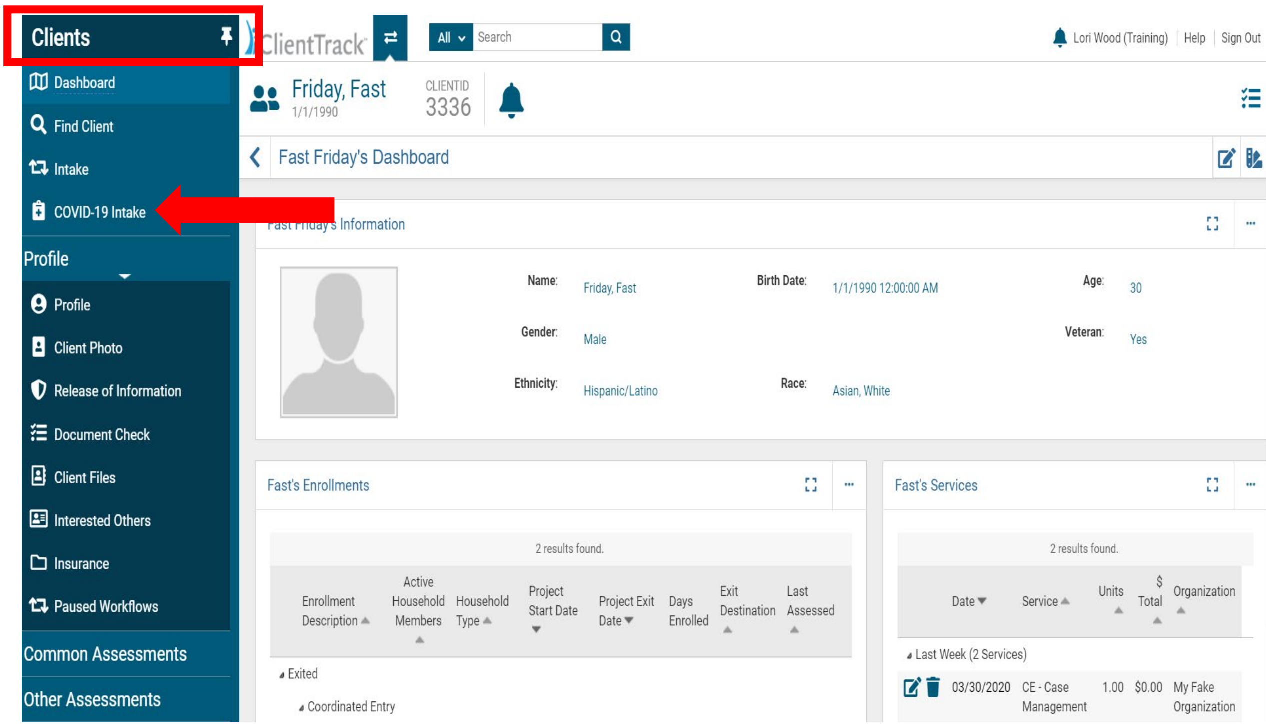
How to Guide: HMIS/DV CLIENTTRACK COVID – 19 Intake

Effective 4/2/2020

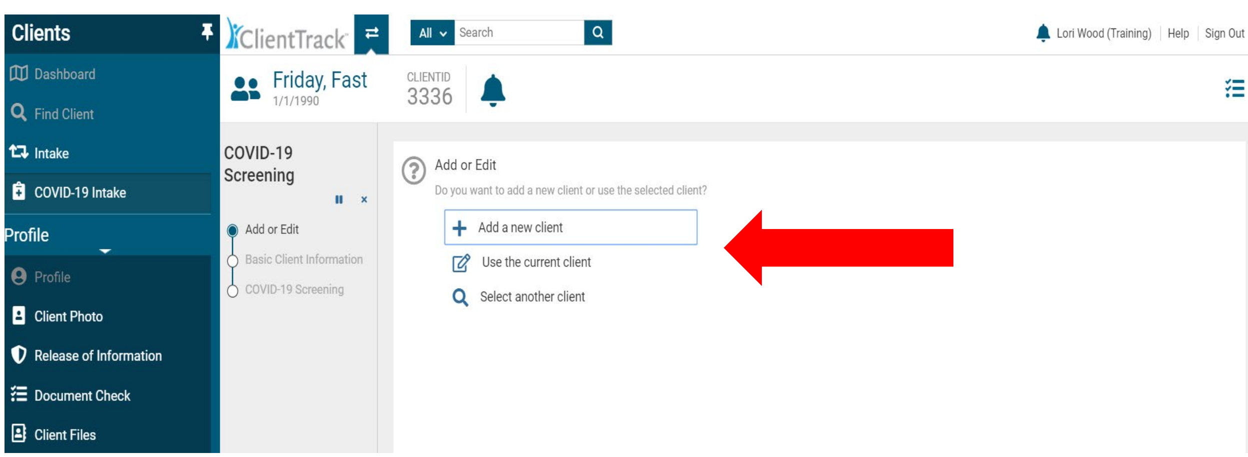
THE COVID-19 INTAKE FUNCTION IS FOR NEW HMIS/DV CLIENTTRACK CLIENTS ONLY! FOR EXISTING HMIS/DV CLIENTTRACK CLIENTS, PLEASE SEE THE "HOW TO GUIDE" FOR THE COVID-19 SCREENING ASSESSMENT.

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.

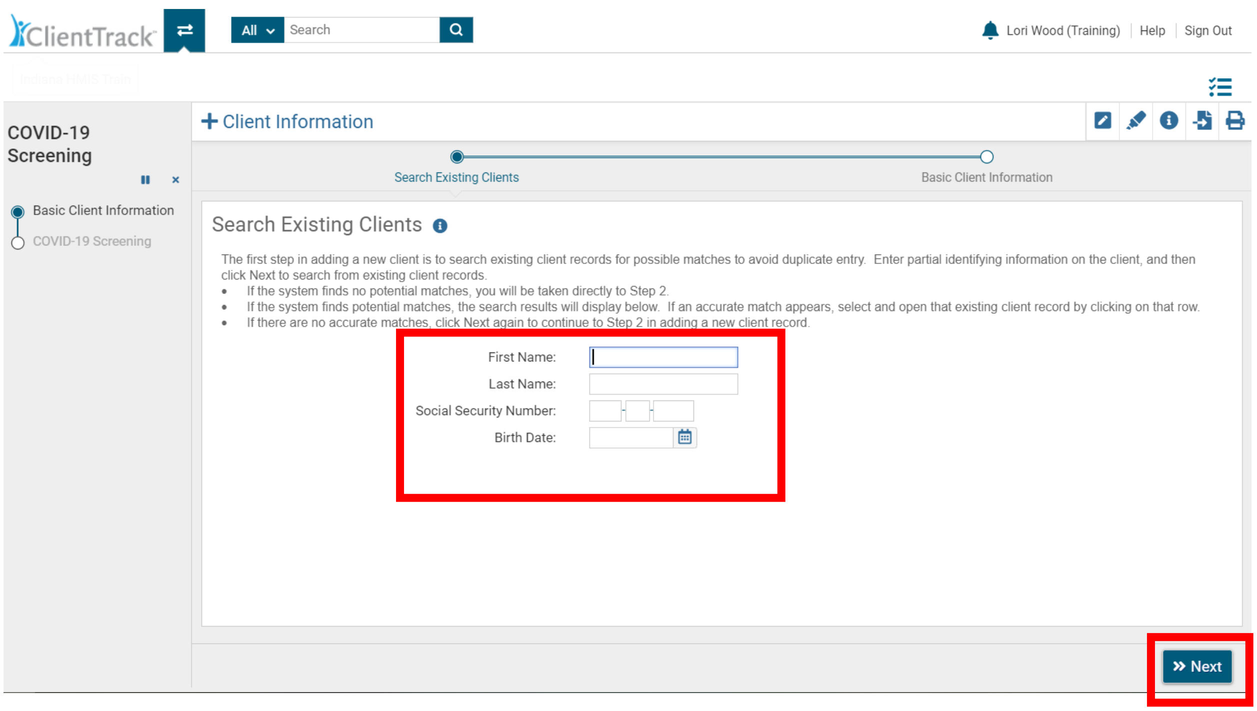
1. **Select** (click on) **"COVID-19 Intake"** located in the menu on the left-hand side of the screen.



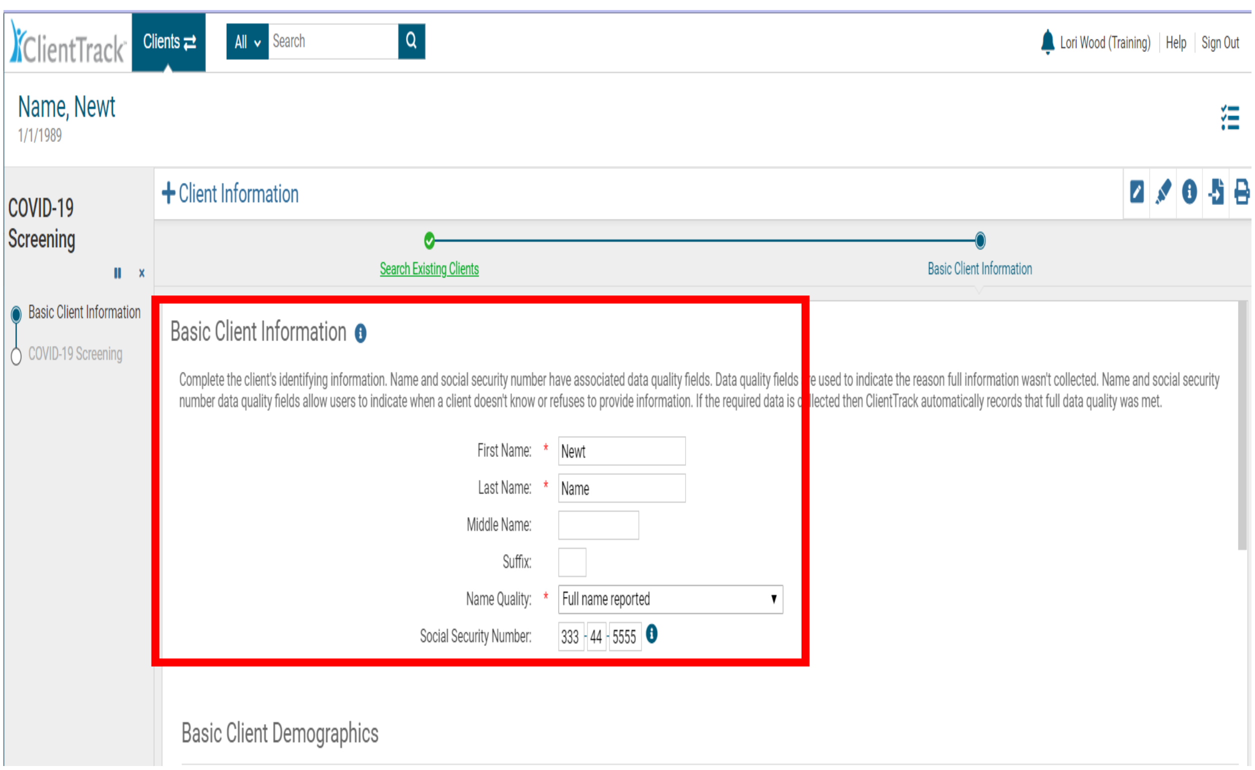
2. **Select "Add a new client"** to create a new **Client** record for a client with no existing HMIS/DV CLIENTTRACK record.



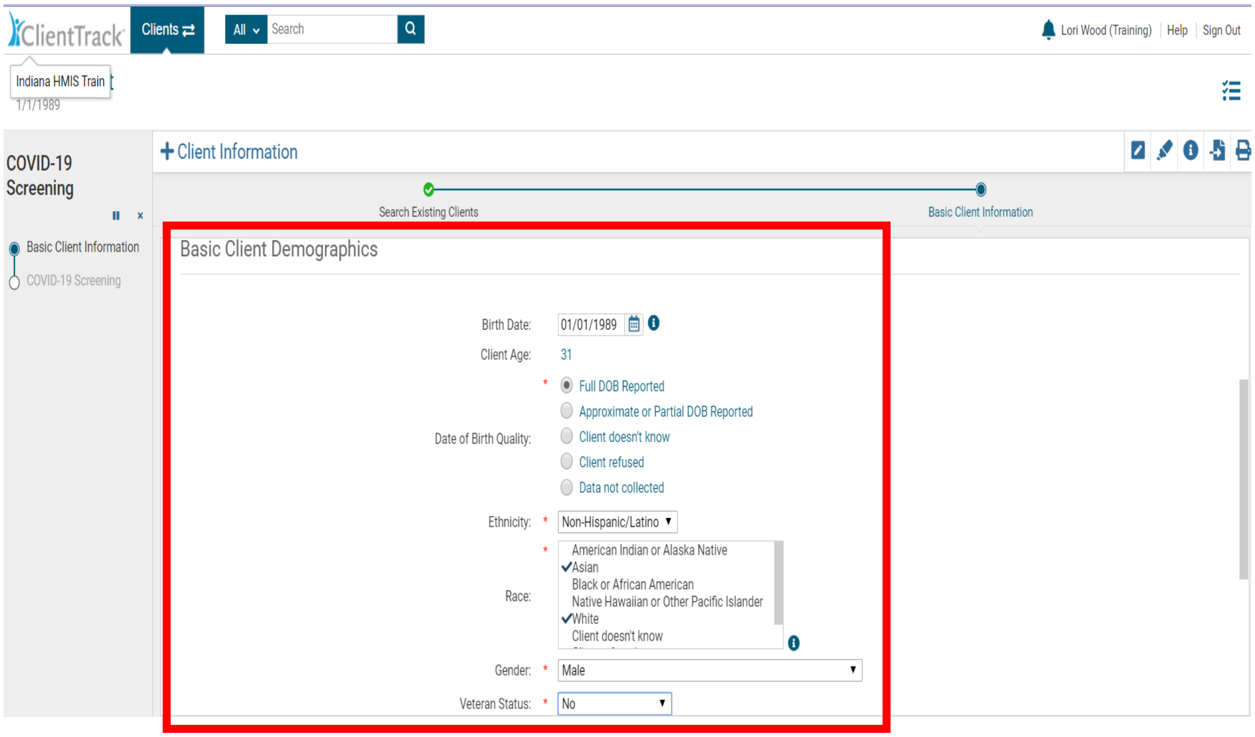
3. Enter the client's **First and Last Name**, **Social Security Number** and **Birth Date** then click **"Next".**



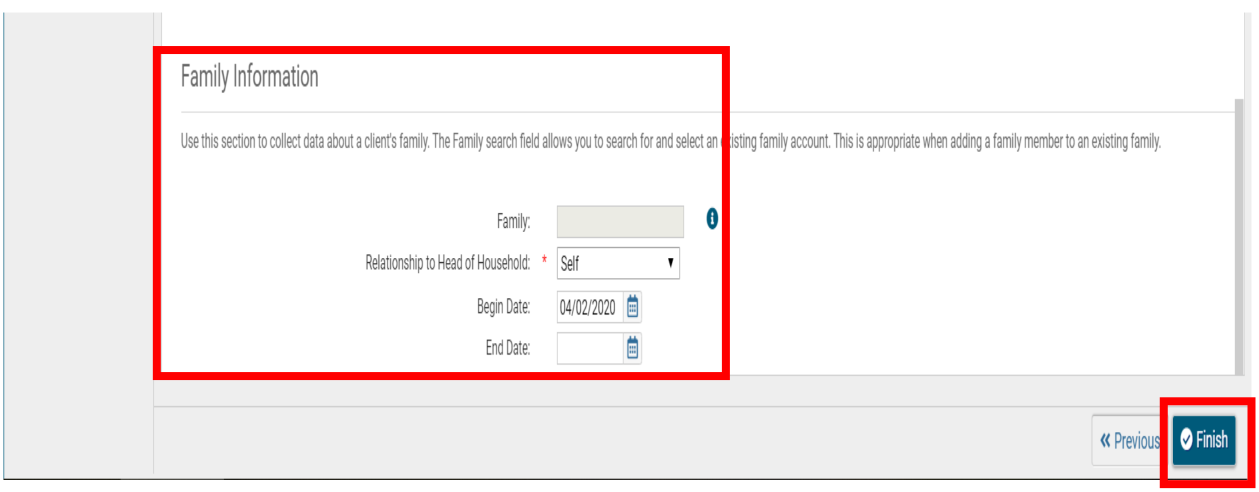
4. Complete the **"Basic Client Information"** fields.



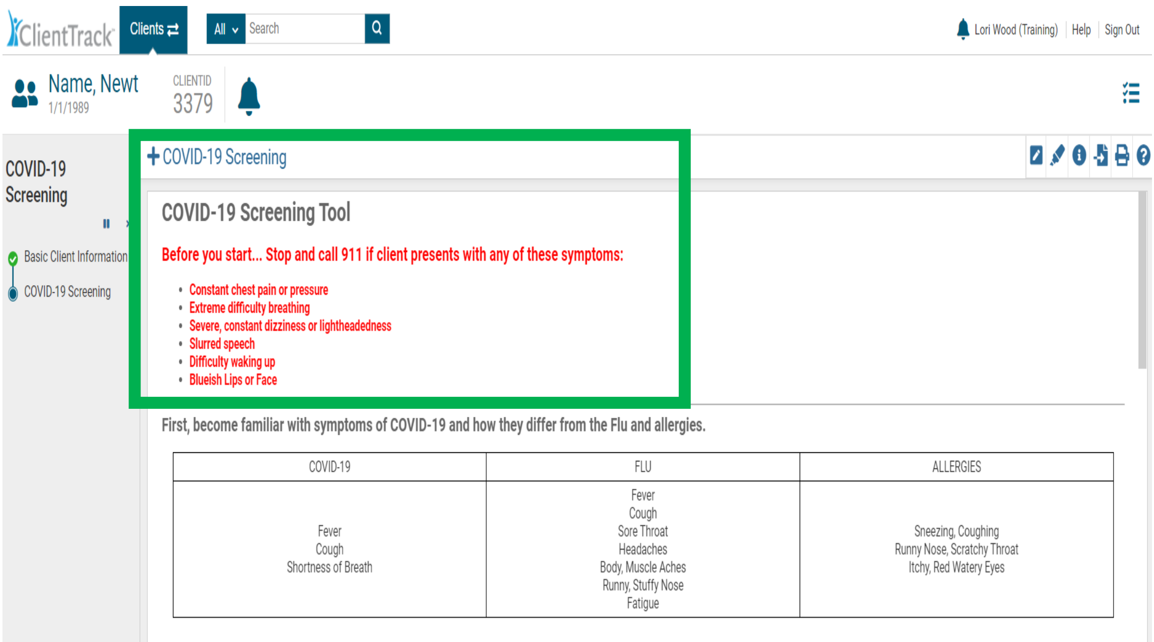
5. Complete the **"Basic Client Demographics"** fields.



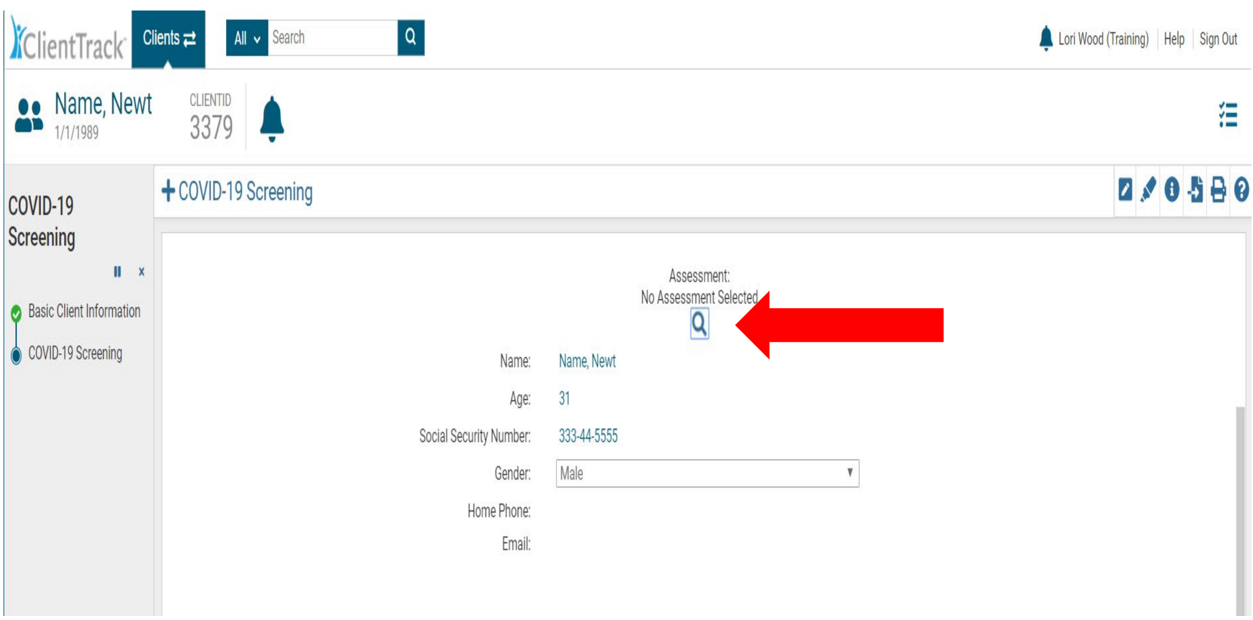
6. Review the **"Family Information"** fields then click **"Finish"**



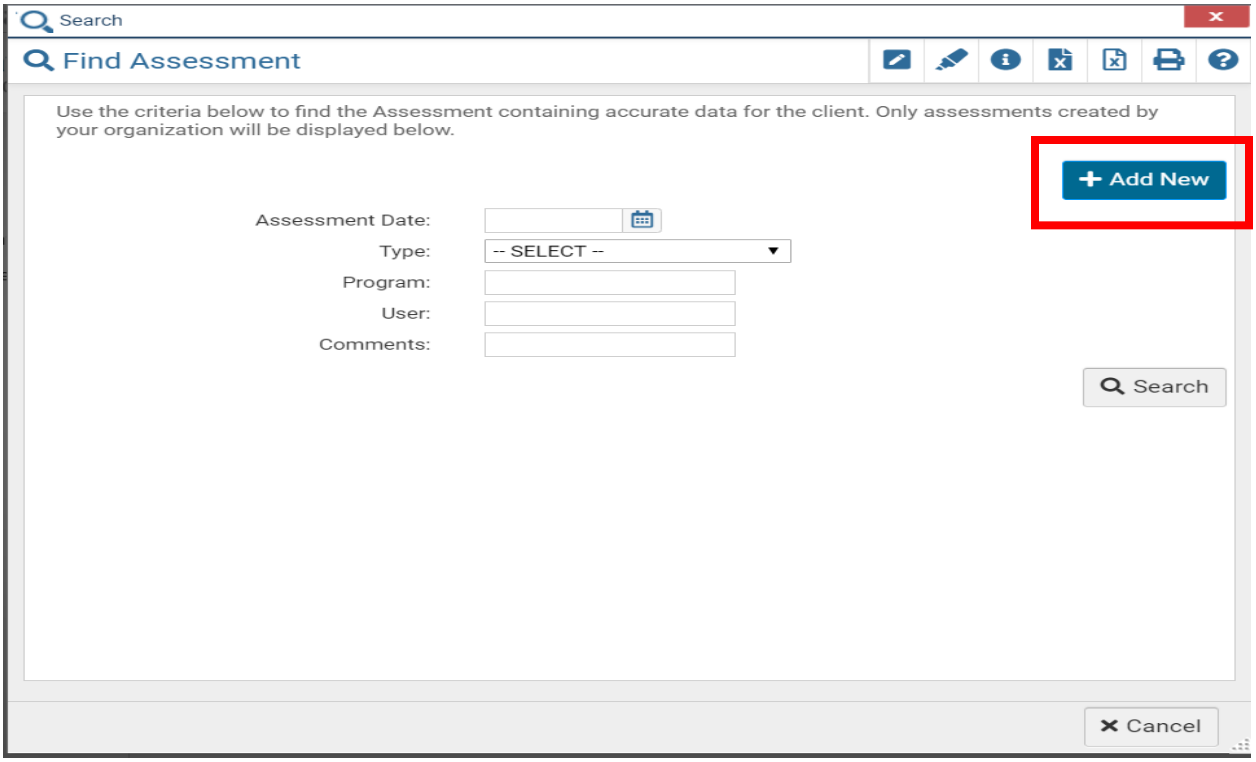
7. **IMPORTANT NOTE: Please READ the "Before You Start" warning below**



8. Next, click on the **"Magnifying Glass"** displayed under **"Assessment – No Assessment Selected".**

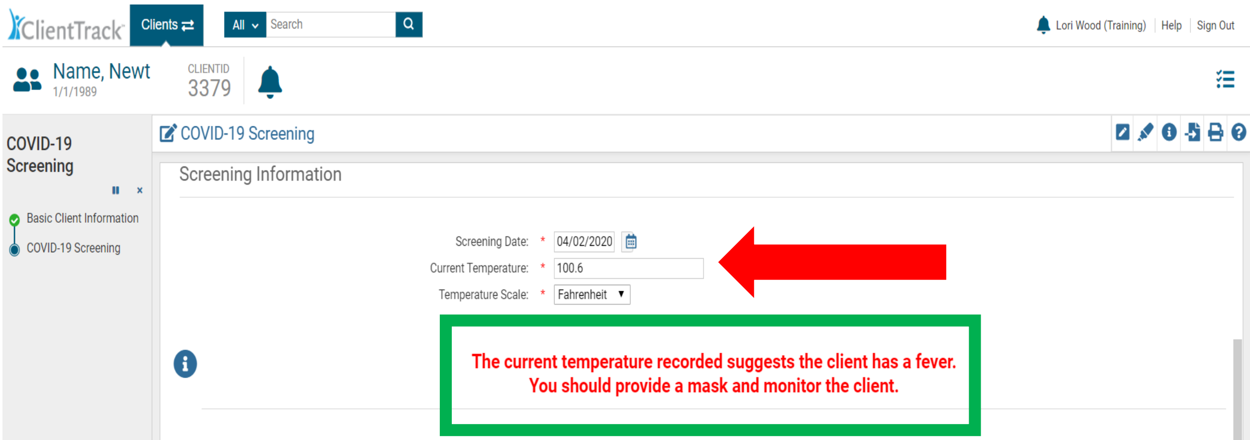


9. Click **"Add New"**

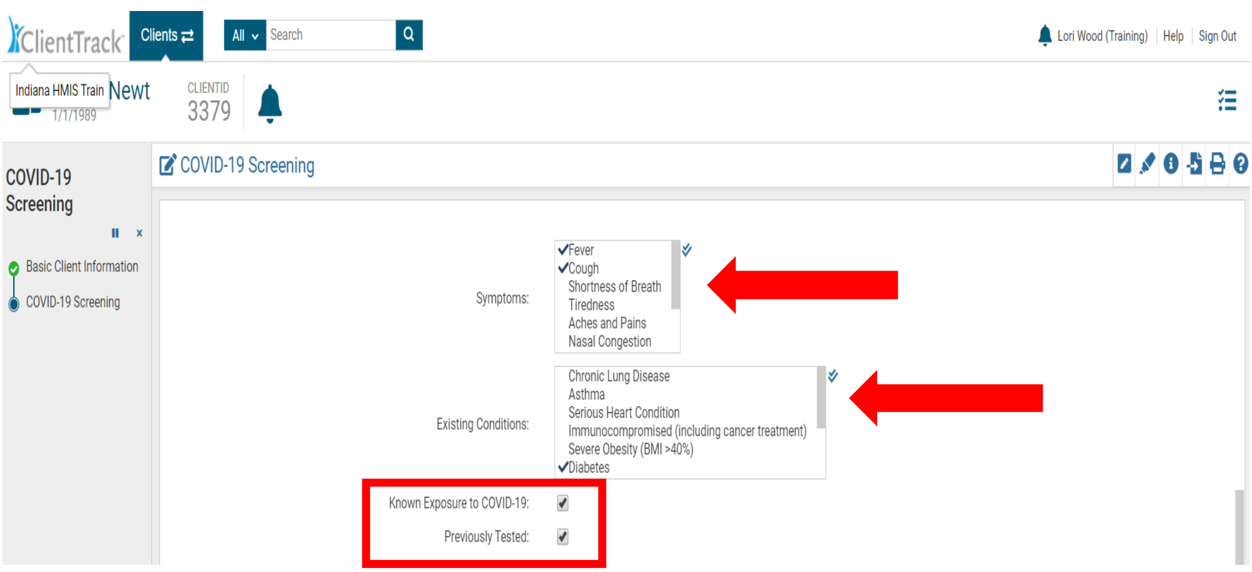


10. Complete the **"Assessment Date", "Assessment Type" and "Program"** from the drop-down lists.
11. Enter any pertinent comments in the **"Comments"** text box
12. Click **"Save"**

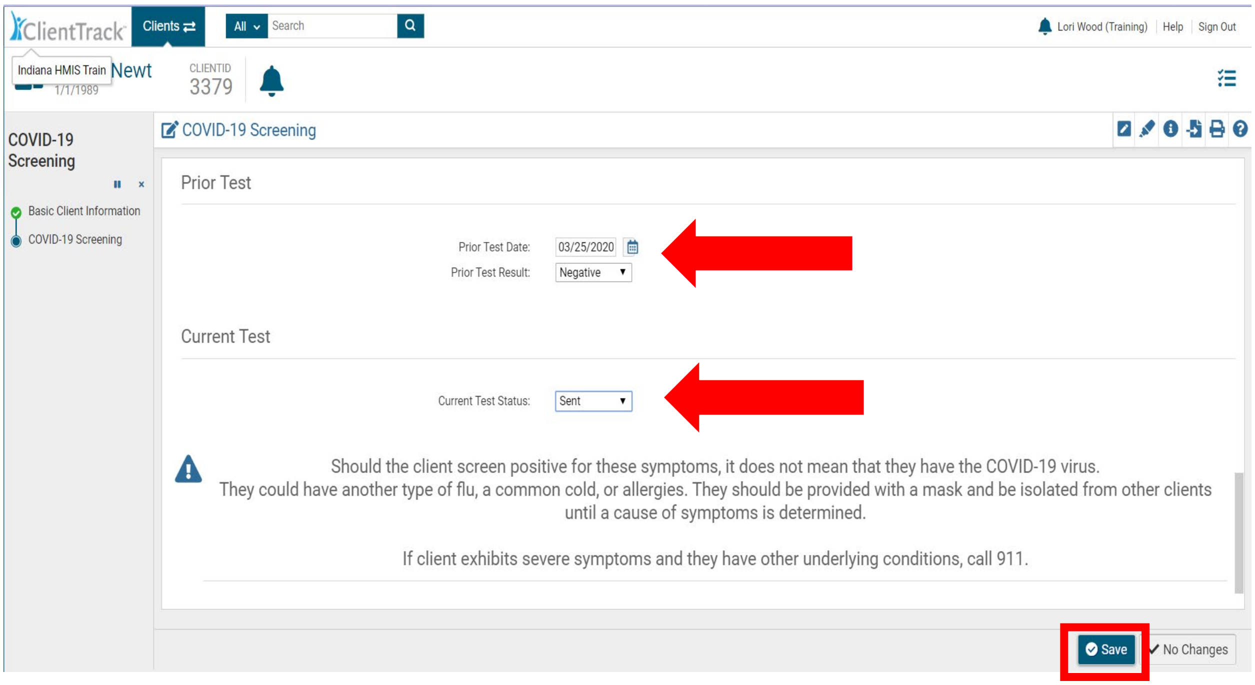
13. Complete the **“Screening Information”** fields. **NOTE: Additional fields may populate based upon the information disclosed by the client and entered in the system**.   Example outlined in Green below: Client has a current temperature of 100.6 degrees fahrenheit.



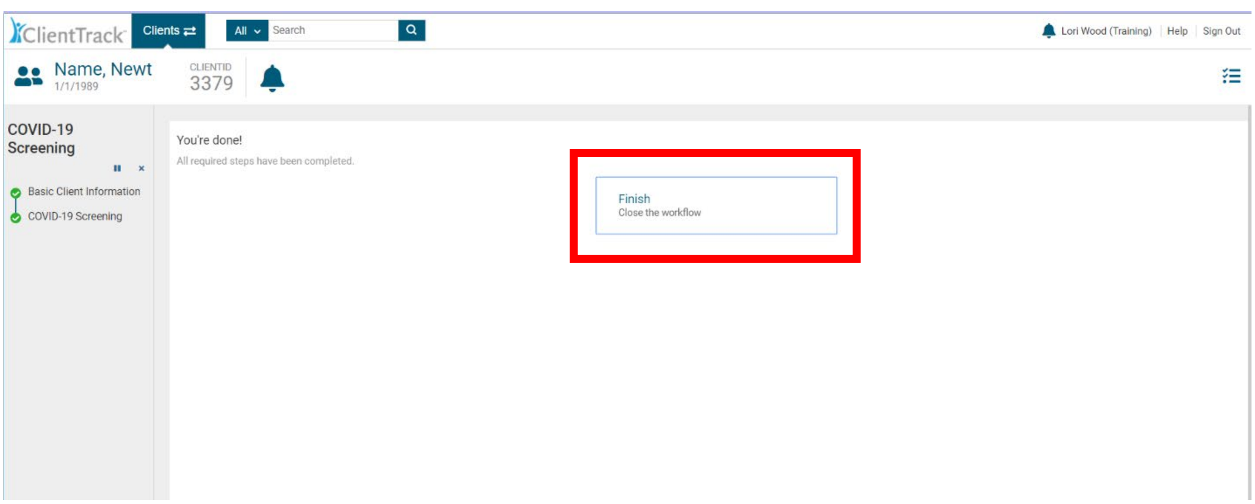
14. Select the client’s **“Symptoms”** from the drop-down box
15. Select the client’s **“Existing Conditions”** from the drop-down box
16. **“Known exposure to COVID-19”** if client answers **“Yes”, please click the check box**
17. **“Previously Tested”** if client answers **“Yes”, please click the check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



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"**



21. To finish the assessment, please click **"Finish"**



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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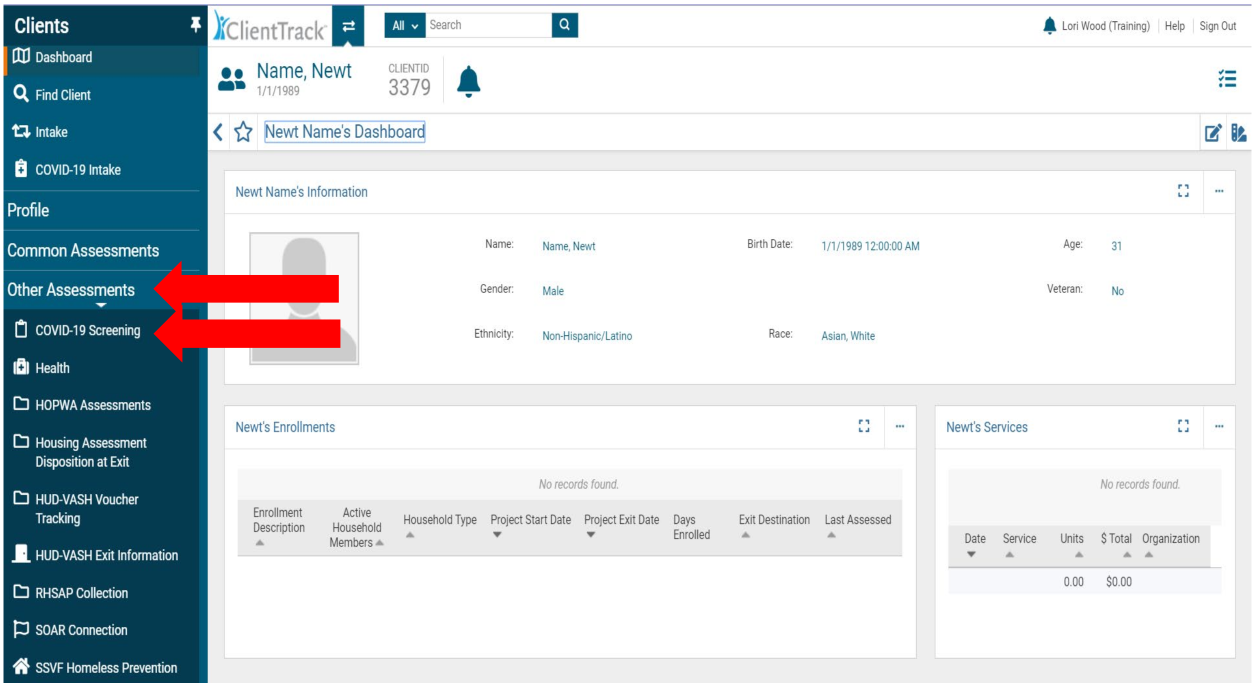
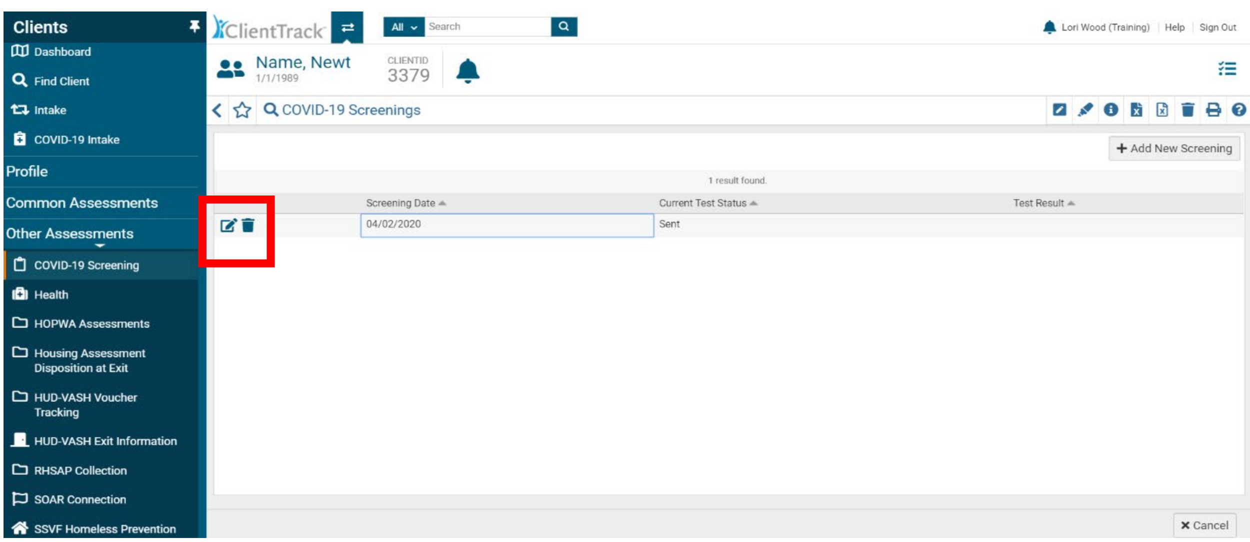


23. The screen will display a list of all COVID-19 screenings attached to the client's HMIS/DV CLIENTTRACK record. **To access a specific screening, click on the little blue pencil to the left of the screening you wish to review. The selected screening will appear.**



Please contact the help desk if you require additional assistance

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