
Homeless Management Information System (HMIS)

Indiana Housing &
Community
Development Authority

3.2.2012

Homeless Management Information System (HMIS)

New User Training

A Homeless Management Information System is an electronic data collection system that stores longitudinal client-level information about persons who access homeless prevention and/or homeless services. HMIS is a valuable resource from the participating homeless assistance and homeless prevention programs in a Continuum of Care (CoC). Aggregate HMIS data can be used to understand the size, characteristics and needs of the homeless population at the local, state and national levels. The HMIS enables information about client needs, goals and service outcomes. IHCD will begin using a software platform from DSI, Inc called ClientTrack and can be accessed using the following URL:

<https://ihcdaonline.com>

Your computer will need to support either Internet Explorer 7 or 8 or Mozilla Firefox 2010 to support the ClientTrack application.

Objectives:

- Review ICHDA Implementation of Clienttrack and important changes in data collection
- Review HMIS Security Policies and Procedures
 - New Policy – Implied Consent
- Learn to log in and complete the following actions:
 - Client Look-up
 - Client Entry
 - HMIS Program Data Intake Workflow (non-HPRP Programs)
 - Enter Services
 - Complete an Annual Assessment
 - HMIS Program Data Exit Workflow (non-HPRP Programs)
 - Case Notes
 - Submission of Issues to IHCD
 - Sign Out
- Review HMIS Contacts for IHCD

HMIS Staff

Kerrie Kikendall, HMIS Manager, KKikendall@ihcda.in.gov, 317-234-6973

Brennan Butler, HMIS Data Specialist, bbutler1@ihcda.in.gov, 317-234-7572

Fax Number: 317-232-7778

HMIS ISSUES RELATED TO CLIENTTRACK SHOULD FIRST BE SUBMITTED TO
HMISHelpDesk@ihcdaonline.com

HMIS Security Policies and Procedures

Personal protected information (PPI) is considered any information that could lead to individual identification. Participating agencies should have procedures in place for the secure storage and disposal of hardcopy and electronic data generated from the HMIS or created for entry into the HMIS.

PPI should be stored in locked drawers/file cabinets and hardcopy data should be shredded before disposal. Electronic PPI data including information contained on disks, CD's, jump drives, computer hard drives or other media should be reformatted before disposal.

Privacy and Client Information Restrictions

The Notice of Privacy Practices including the purpose for data collection should be posted in a public area and in an office where an intake professional meets with clients. The full Privacy Policy Notice is available on the IHEDA website and should be made available to clients upon request.

A signed client consent form is no longer required. A client who presents to your agency for services and provides information is giving implied consent to enter and share certain data in the HMIS. However, there is some information that will not be shared with other agencies. Information that will not be shared includes HMIS Barriers, domestic violence status and case notes.

Additional information regarding client consent and restrictions will be covered in more detail during training. *No homeless person is to be refused services regardless of their participation in HMIS.*

HMIS Computers

All computers that are used to access the HMIS should be situated in secure locations. HMIS computers in publicly accessible areas should be staffed at all times and should not be 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 HMIS password, but rather a password to prevent access to the computer itself.

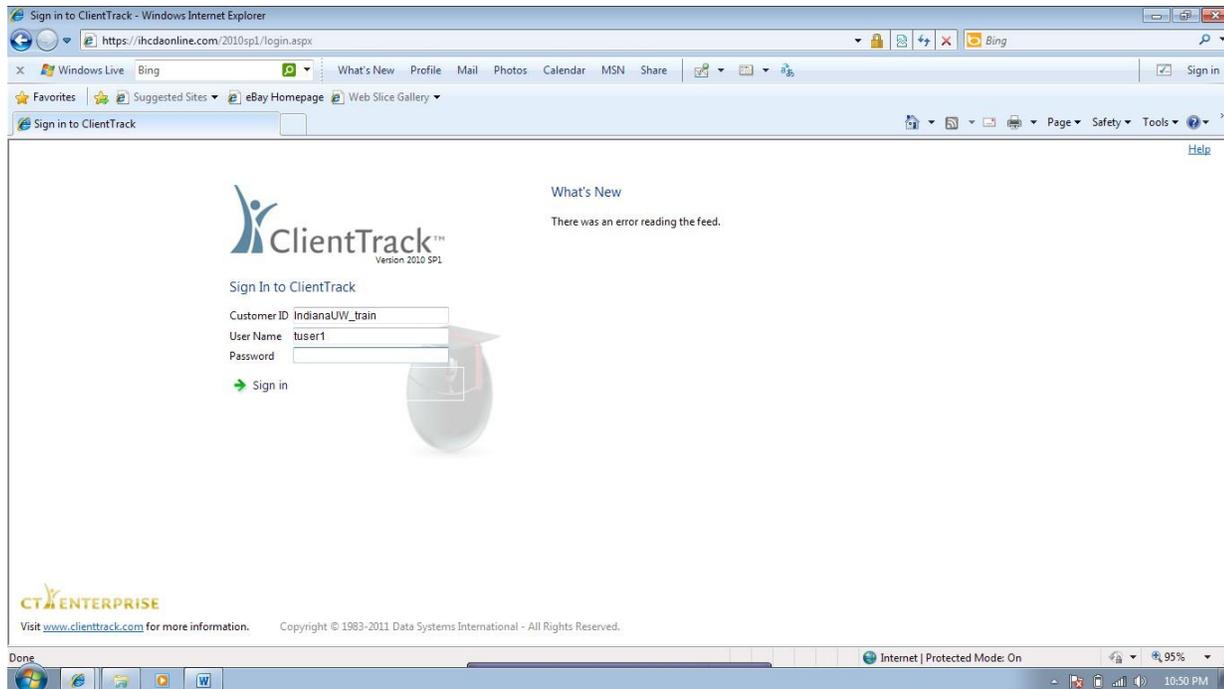
Passwords

HMIS usernames and passwords should 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). HMIS security policies require the use of strict passwords.

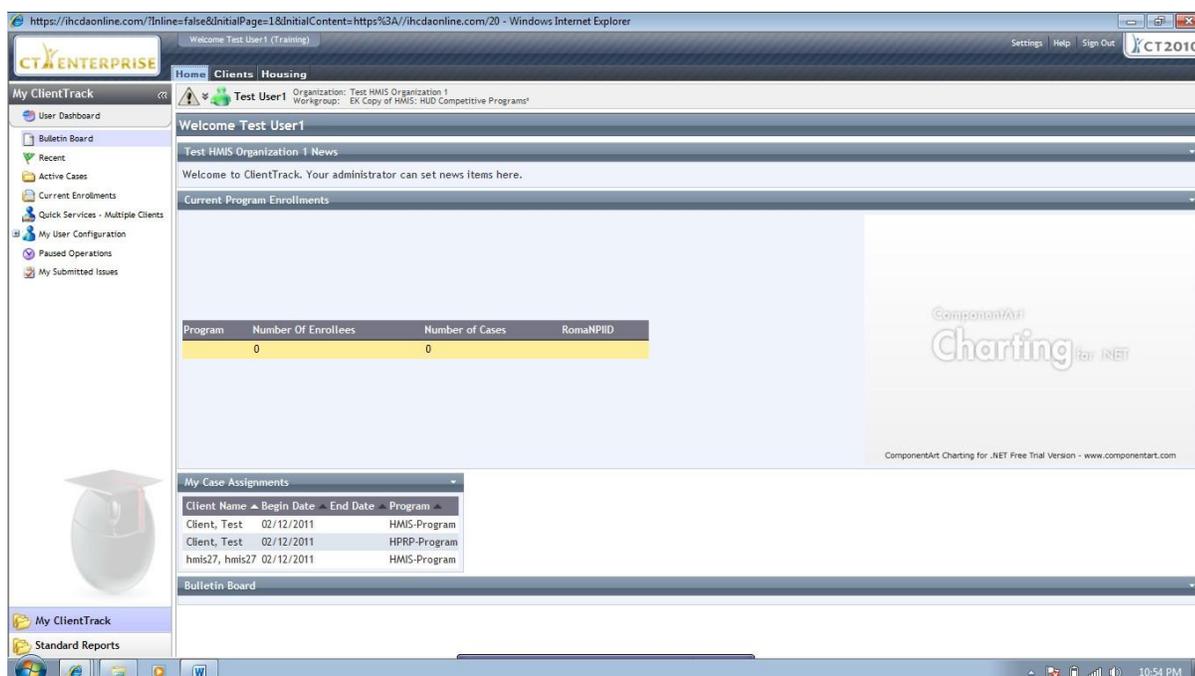
- Must have at least one number
- Must be between 8 and 12 characters
- Must have at least one non-letter, non-numeric character
- Must contain at least one capital letter
- New passwords will be required upon first login and if an account is deactivated due to inactivity

User Login

Open your web browser and go to <https://ihcdaonline.com> . Enter your assigned User Name and Password and click Sign In. You will be required to reset your password upon your first login. **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 should change your settings to allow for pop-ups from this site.** If prompted to select a workgroup and/or organization, highlight the desired option and click Sign In.

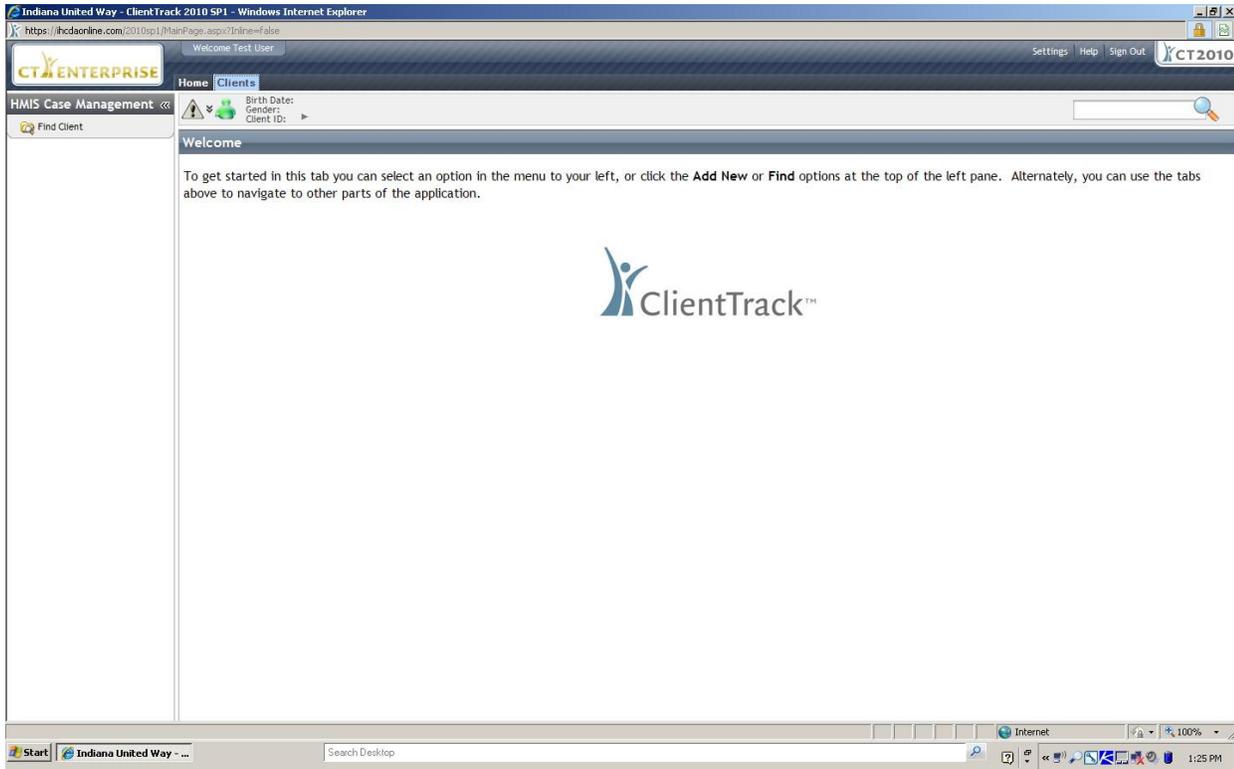


You will be directed to your User Dashboard. You will be notified of any “News” items that IHCDAs wants to communicate to you. Please remember to pay attention to these News items. Other features to become familiar with on this screen include Tabs (Home, Clients) and Menu Items (along the left side of the screen).



The first time you log into ClientTrack, you will need to follow these instructions in order to get the Menu items along the left side of the screen to appear.

Click on the Client Tab at the top of screen. Select Find Client from the menu items along the left of the screen. Enter the name of a client that is currently enrolled in your program. Click Search in the bottom right hand corner. Select the client from the list that is displayed. Once the client dashboard is visible, click the Case Management item on the bottom left hand corner of the screen. All Menu items on the left of the screen should now be visible.



Indiana United Way - ClientTrack 2010 SP1 - Windows Internet Explorer
 https://ihcdaonline.com/2010sp1/MainPage.aspx?inline=false

Welcome Test User Settings Help Sign Out CT2010

Home Clients

HMIS Case Management John Sheets Jr. Birth Date: 11/25/1997 Gender: Male Client ID: 883778

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.

First Name: test
 Last Name: -----
 Middle Name: -----
 Full Name (last, first): -----
 Social Security Number: -----
 Birth Date: 12/06/1969

First Name	Last Name	Middle Name	SSN	Birth Date	Client ID
Test	Client			12/06/1969	883817

Case Management

Indiana United Way - ClientTrack 2010 SP1 - Windows Internet Explorer
 https://ihcdaonline.com/2010sp1/MainPage.aspx?inline=false

Welcome Test User Settings Help Sign Out CT2010

Home Clients

HMIS Case Management Test Client Birth Date: 12/6/1969 Gender: Female Client ID: 883817

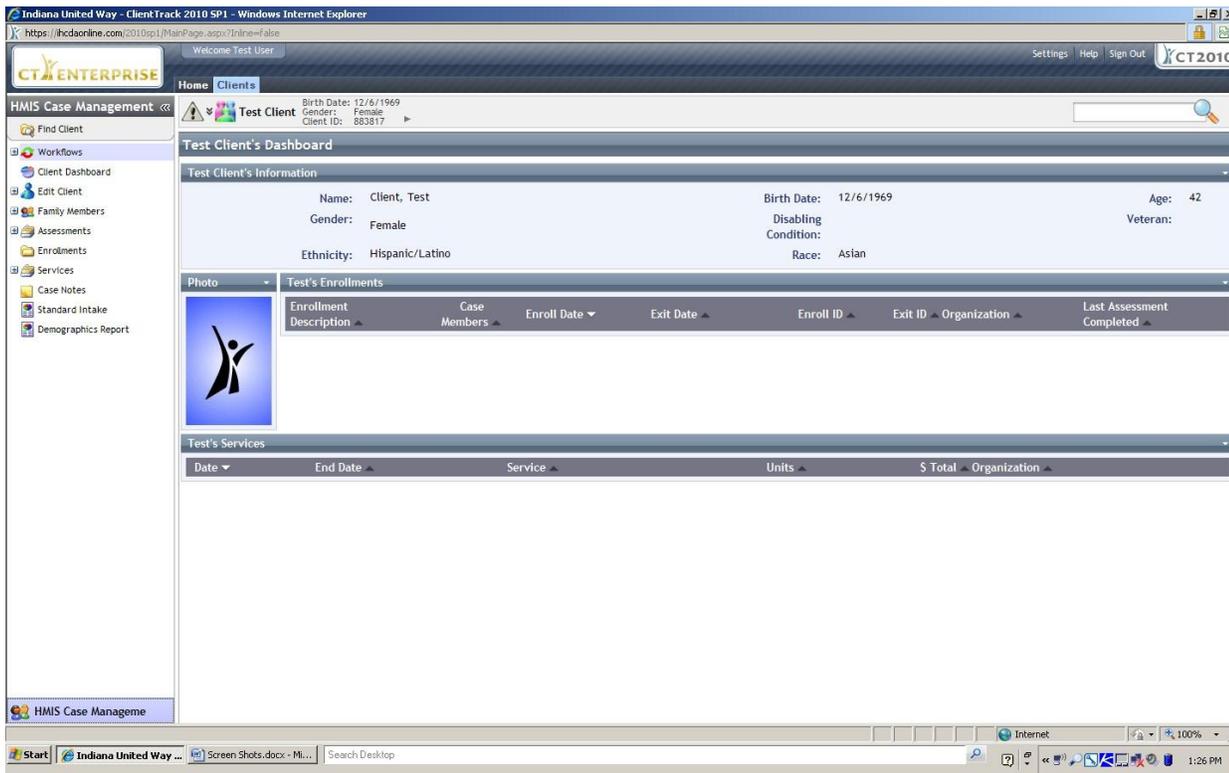
Find Client

Test Client's Dashboard

Test Client's Information

Name: Client, Test Birth Date: 12/6/1969 Age: 41
 Gender: Female Disabling Condition: Veteran:
 Ethnicity: Hispanic/Latina Race: Asian

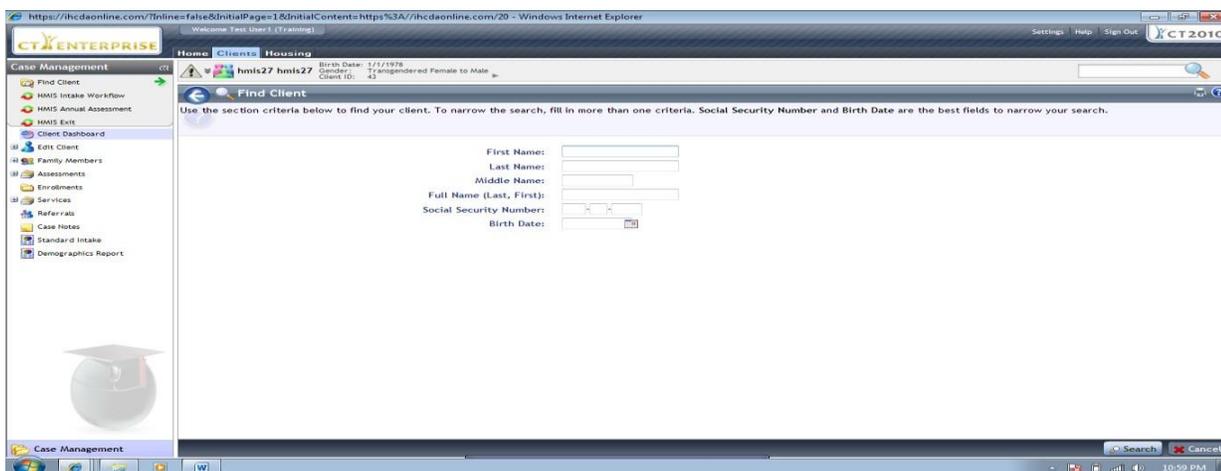
Test Services	Date	End Date	Service	Units	Status	Organization



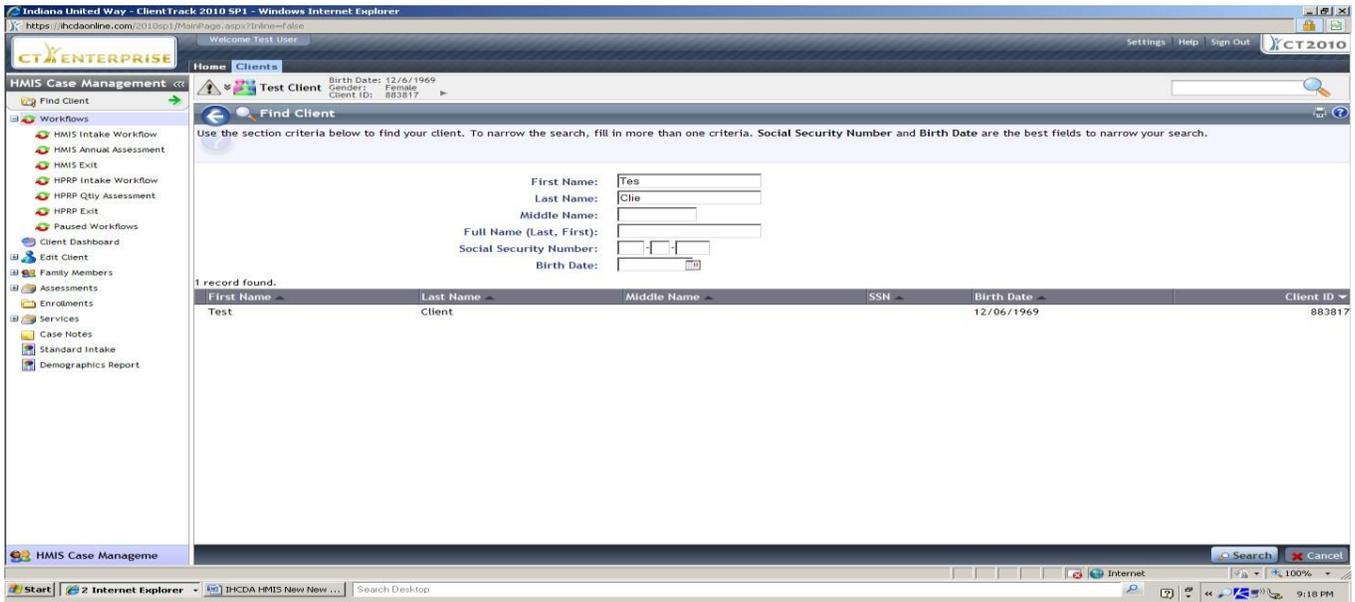
Client Lookup

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 HMIS data. Even though ClientTrack will warn you of potential duplicates, it is important to search for clients prior to the start of adding a new client. To search for an existing client in the database, click the Find Client menu item on the Client Tab.

You may search for a client by entering client first/last name, social security number or birth date. It is important to try different options for your search. 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 search hint is to search different spellings and remember to search for nicknames such as "Bob" in addition to "Robert" or "Bill" in addition to "William".

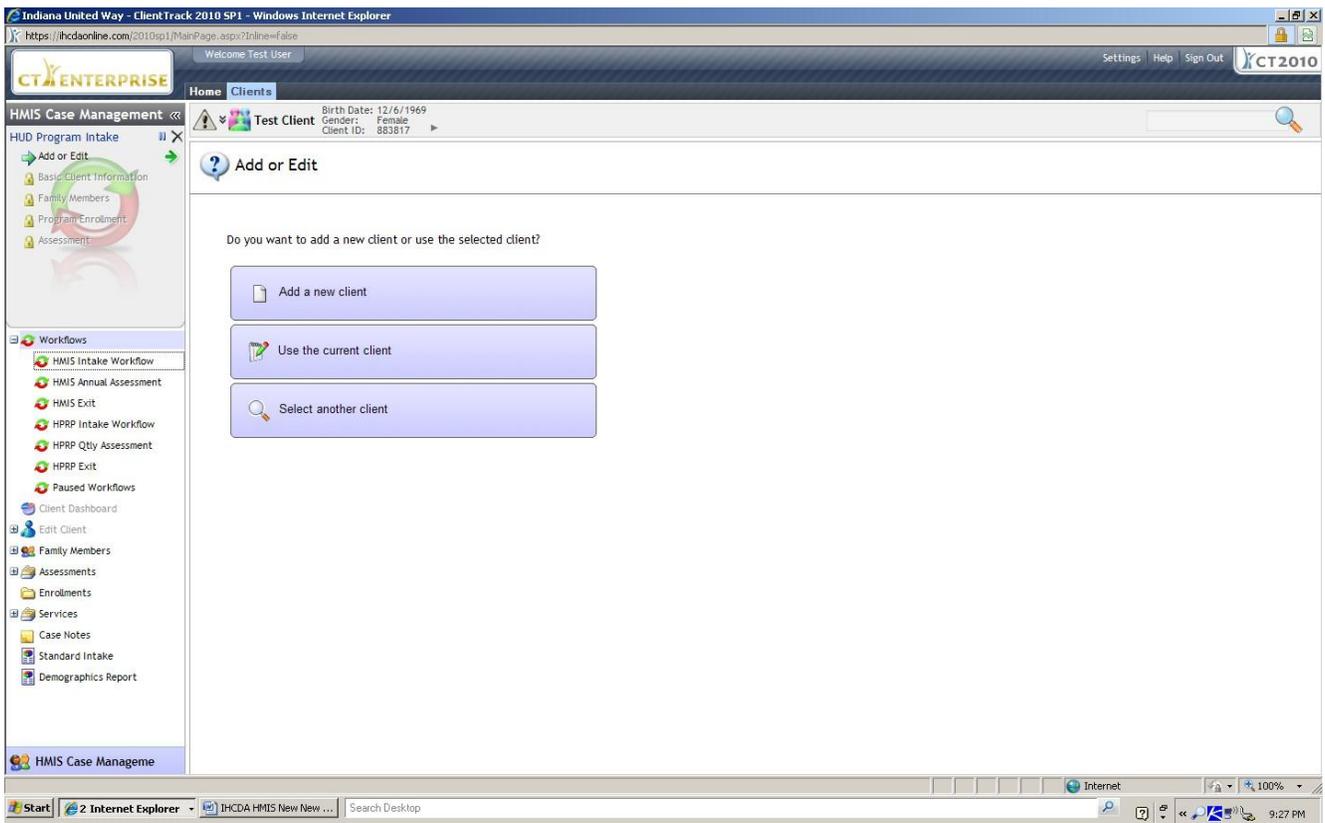


If the client is already in the system, highlight the client name in the search results and click to select. The selected client's information will be displayed at the top of the screen. All information entered from this point forward while on the Client Tab will be associated with the currently selected client. You should click on the Edit Client Information menu item and make any necessary changes to the client demographic information.



Add a New Client to a HUD Program (non-HPRP)

To add a new client or begin the workflow to create an enrollment for a client already in the system, expand the Menu item "Workflow". Select the HMIS Intake Workflow to begin. You will be prompted to select the current client or add a new client.



In order to ensure all required assessments are completed, ClientTrack utilizes a specific workflow that steps you through this process. Using these built-in workflows, you will step through these processes automatically. Click the Workflow option that is appropriate. **Be sure you begin the workflow while you are on the client record for the Head of Household.** You will be asked to verify the intake information for the client. Make any changes if necessary and click Save. If there are no changes, click No Changes.

The steps for the workflow will be displayed in the upper left hand corner of the screen. The first step is the completion of the Master Assessment. On the Master Assessment screen, be sure to change the Assessment Date if different from today's date.

To add a **NEW** client to the database, select the HUD Program Intake menu item to the left. Choose the appropriate button (Add a New Client).

If a duplicate client already exists (and was not identified during the client lookup), a warning in red letters will be displayed. It is very important to review the displayed list. If the client is already in the system, click the client's name to select. If the client you are entering is in fact a new client (do NOT select a client in the displayed list), click next to proceed with the intake process.

IHCDA is always working to eliminate duplicate clients in the HMIS. Please contact the IHCDA HMIS help desk at HMISHelpDesk@ihcda.in.gov with clients that have multiple records in the system. When sending a notification of duplicates or any information regarding clients to the HMISHelpDesk@ihcda.in.gov please **DO NOT** include a full social security number. Client ID numbers can be found to the left of the client name on the client lookup screen or above the client name on the client dashboard.

The screenshot displays the ClientTrack 2010 SP1 web application interface. The browser title is "Indiana United Way - ClientTrack 2010 SP1 - Windows Internet Explorer". The URL is "https://ihcdaonline.com/2010sp1/MainPage.aspx?InLine=False". The page shows a navigation menu on the left with options like "HUD Program Intake", "Basic Client Information", "Family Members", "Program Enrollment", and "Assessment". The main content area is titled "Client Information" and contains several sections:

- Client Information:** Fields for First Name (*), Last Name (*), Middle Name, Suffix, and Social Security Number (234-58-17543).
- Basic Client Demographics:** Fields for Birth Date (12/06/1969), Client Age (42), Date of Birth Quality (Full DOB Reported), Ethnicity (Non-Hispanic/Latino), Race (Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White), Gender (Female), and IHOPE Number (86757).
- Family Information:** Fields for Family ID and Relationship to Head of Household (Self).

At the bottom of the form, there are navigation buttons: "Previous", "Next", and "Pause". The Windows taskbar at the bottom shows the Start button, Internet Explorer, and the system clock at 9:36 PM.

You will be prompted to enter demographic information for the client. Items with a red asterisk (*) are required fields and records cannot be saved without entering this data. Birthdate and Phone Number fields are auto-formatting so that dashes are not required when entering information in these fields. Birthdates can be entered in mmddyyyy format. Once entered, they will be automatically formatted to the appropriate display. Information regarding the data elements is listed below:

First Name – Legal first name (do not add nicknames in “quotes” – those are not searchable elements)

Last Name – Legal Last Name

Social Security Number – If the client does not 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 fits the situation. Please keep in mind a high rate of “Don’t Know or Refused” may raise data quality concerns.

Birth Date – Month, day and year the client was born. Again, do not use a fake number. Choose the appropriate data quality option that best fits the situation.

Ethnicity – Determines if a client is of Hispanic/Latino origin and includes individuals of Cuban, Mexican, Puerto Rican, South or Central American origin. Generally, if a client identifies as Hispanic, they will usually choose White as their race.

Race – This is a self-identified data element and a person can identify with multiple races. This is a multi-select box that allows for multiple races to be checked.

Gender – Select gender with which client identifies.

IHOPE Number – This is an optional field but required for HPRP clients.

Family – Do NOT enter anything in the Family field. ClientTrack will create a family/household account.

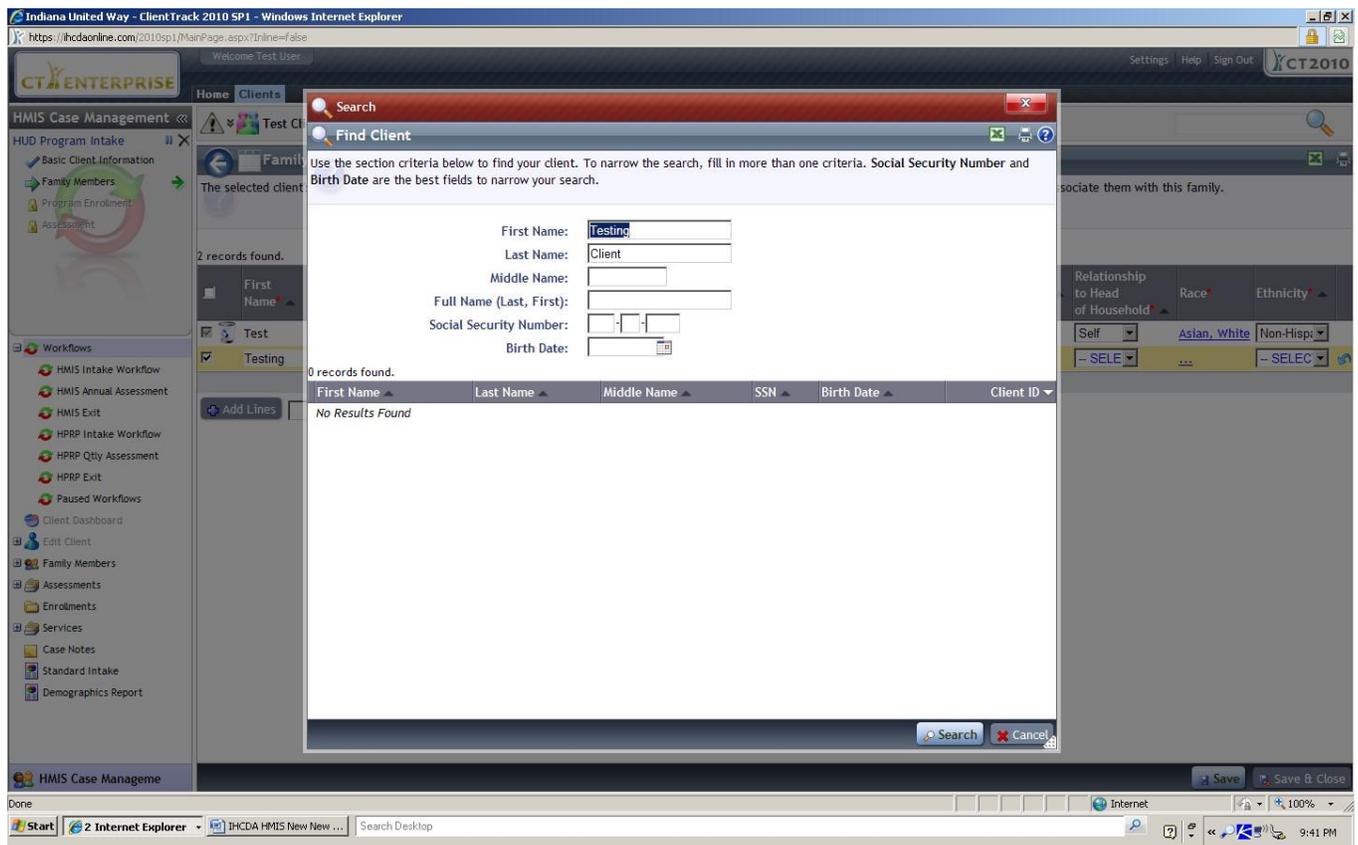
Relationship to Head of Household – When entering the first client in the household, the system will default to “Self”. It is imperative this information is entered correctly for ALL household members. Otherwise, your reports will not accurately reflect the clients and family make-up.

Address – Add the address where client will be residing (emergency shelter, etc). This is NOT the previous address of the client.

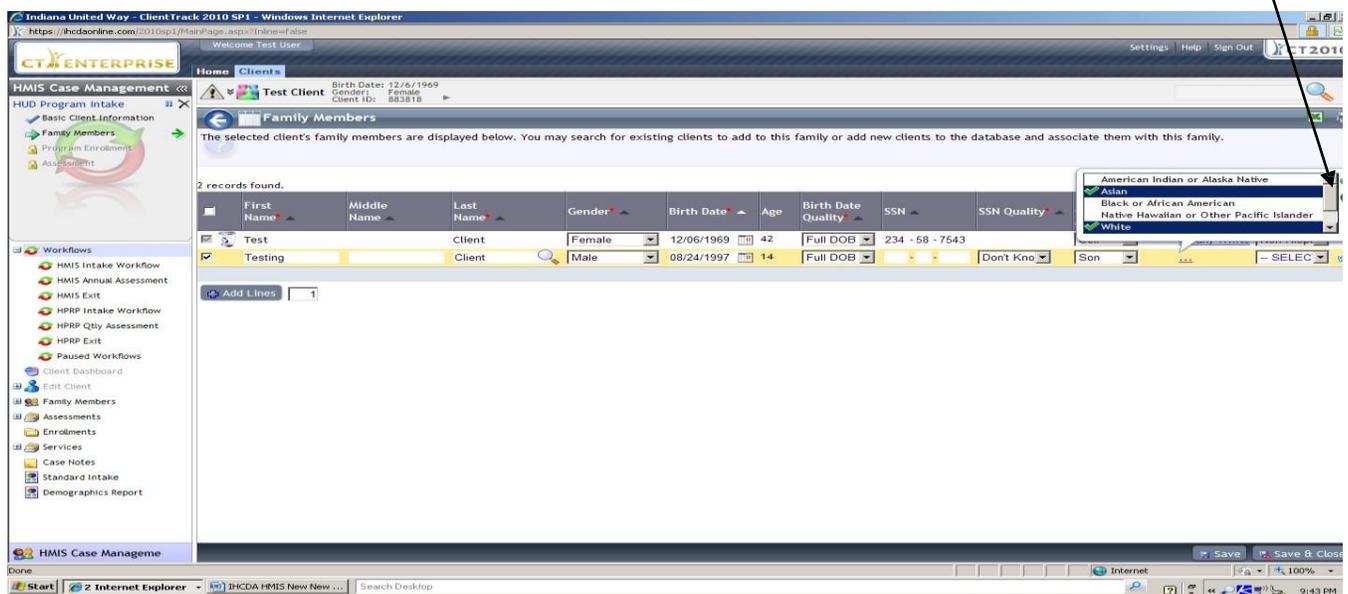
The screenshot displays the ClientTrack 2010 SP1 web application interface. The browser window title is "Indiana United Way - ClientTrack 2010 SP1 - Windows Internet Explorer". The URL is "https://ihcdaonline.com/2010sp1/MainPage.aspx?inline=false". The page shows a navigation menu on the left with options like "HUD Program Intake", "Basic Client Information", "Family Members", "Program Enrolment", and "Assessment". The main content area is titled "Client Information" and has three tabs: "Search Existing Clients", "Basic Client Information", and "Contact Information". The "Contact Information" tab is active, showing a form to enter basic contact information for a client. The form fields are: Address (123 Main Street), Address 2 (Emergency Shelter), City / State / Zip (Indianapolis, IN, 46204), Home Phone (317-555-5555), and Email (clientsemal@email.com). The bottom of the screen shows the Windows taskbar with the Start button, Internet Explorer icon, and system tray showing the time as 9:39 PM.

Add Family Members

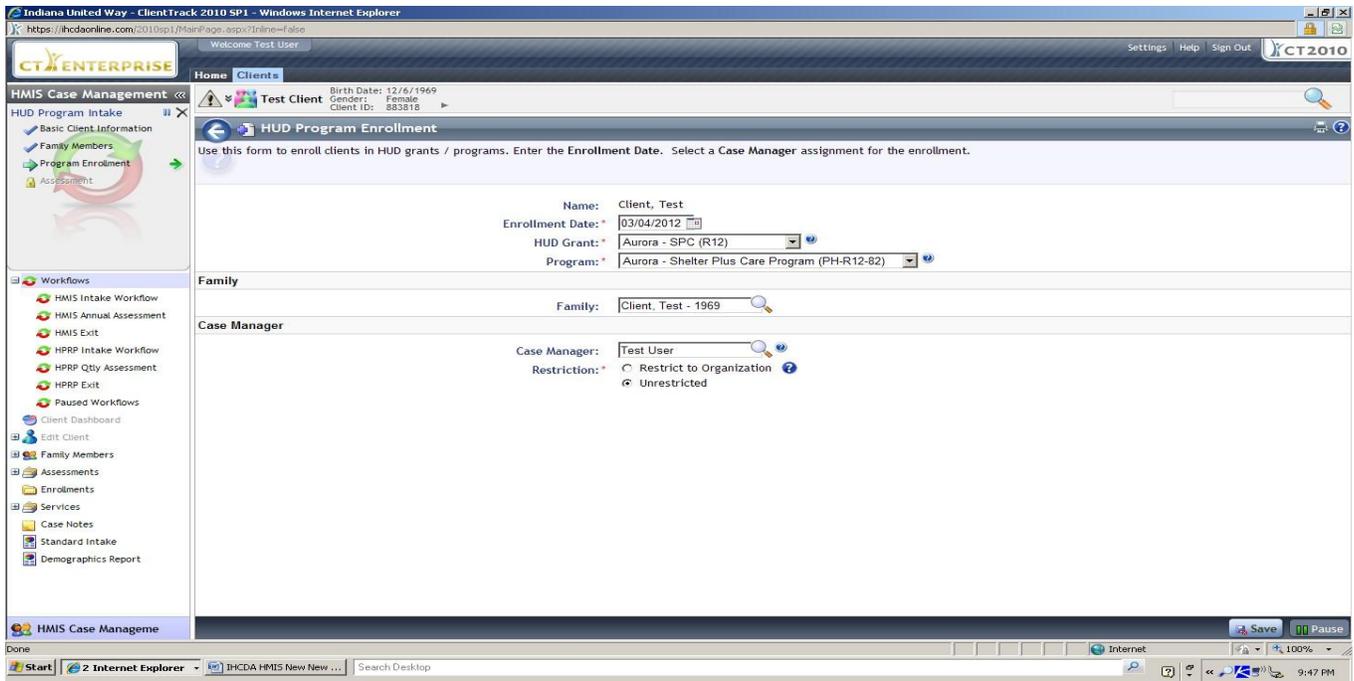
Next, you will be prompted to add any additional family members. After you enter the name of the next household member, the system will complete a search for that client name. If the client is found, select the client from the list and edit as necessary. Select cancel if the client is not found in the system.



Please be sure to complete all information requested. For the race category, you must click on the blue line with the three blue circles to access the race categories. Be sure to select a race and then click on the **green circle** with the check mark. Be careful that you do not use the select all icon. Add lines for additional household members as necessary.



Click the Save and Close button when all household members have been added. You will then be prompted to create the enrollment. Please remember, the Save button will save the changes you 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. You will receive an error message if you are missing any required data fields.



Remember to change the Enrollment Date if you are back dating the information. You no longer have to request back dating permission from IHCD in order to edit/correct or back date information. However, IHCD will monitor time between user logins and your ClientTrack account will be deactivated after 30 days of inactivity. It is vital that you continue to enter data the same day or within 3 days of a client enrollment, service, case note and/or client exit.

You will be required to choose the HUD Grant and Program and click Next. If you do not find your specific grant and/or program, please notify IHCD immediately at HMISHelpDesk@ihcda.in.gov. Please include the name of your grant and program along with specific contact information so that the issue can be resolved as soon as possible.

Grant and program information must be set up in the system before you can begin to enroll clients. You must give adequate time to IHCD in order for the set up in ClientTrack to be completed.

You will now begin a series of required assessments that will finalize the household enrollment. Make sure to properly check Yes or No for the Veteran Status and Disabling Condition.

Indiana United Way - ClientTrack 2010 SP1 - Windows Internet Explorer
 https://ihcdaonline.com(2010sp1/MainPage.aspx?inline=false)

Welcome Test User Settings Help Sign Out CT2010

Home Clients

HMIS Case Management

Test Client Birth Date: 12/6/1969 Gender: Female Client ID: 883818

HUD Program Intake

- Basic Client Information
- Family Members
- Program Enrolment
- Assessment

Workflows

- HMIS Intake Workflow
- HMIS Annual Assessment
- HMIS Exit
- HPRP Intake Workflow
- HPRP Qity Assessment
- HPRP Exit
- Paused Workflows

Client Dashboard

- Edit Client
- Family Members
- Assessments
- Enrolments
- Services
- Case Notes
- Standard Intake
- Demographics Report

HMIS Case Managem

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information.

Assessment Date: 03/04/2012

Assessment Type: Entry

Program: Aurora - Shelter Plus Care Program (PH-R12-82)

Assessor: Test User

Disabling Condition: Yes

Veteran Status: Yes

Veteran Information

Military Branch: Army

Service Era: Persian Gulf Era (August 1991 - September 10, 2001)

Duration of Active Duty (Months): 24

Discharge Status: Honorable

Served War Zone: Yes No Don't Know Refused

Prior Residence - Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.

Residence Prior to Program Entry: Staying or living in a family member's room, apartment or house

Length Of Stay: More than one week, but less than one month

Prior Zip Code - Enter the prior zip code of the apartment, room, or house where the client last lived for 90 days or more.

Prior Zip Code: [Search]

City: [Search]

State: [Search]

Prior Zip Code Quality: Full Zip Code Recorded Don't Know

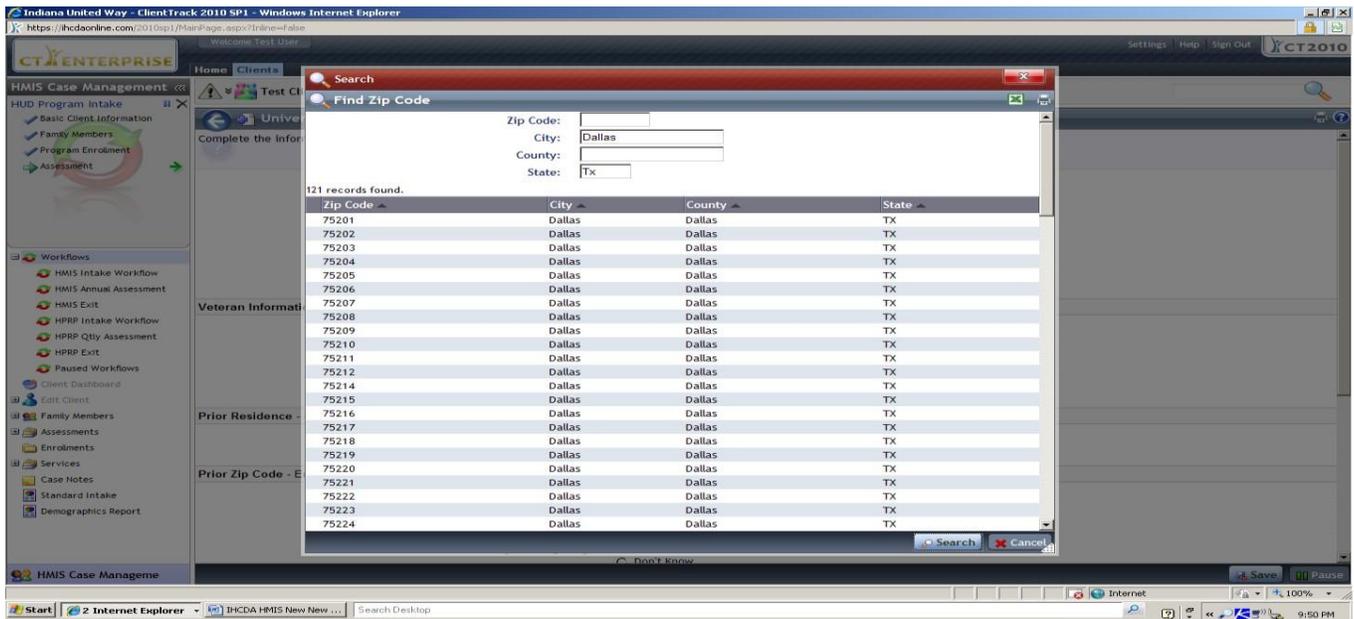
Save Pause

Certain logic is built into the system that will provide for additional drop down menu options based on the way in which certain client data is entered. Because this client is a veteran, additional questions are required to be answered.

Residence Prior to Program Entry – Identify where the client was staying on the night before the client is enrolled in your program.

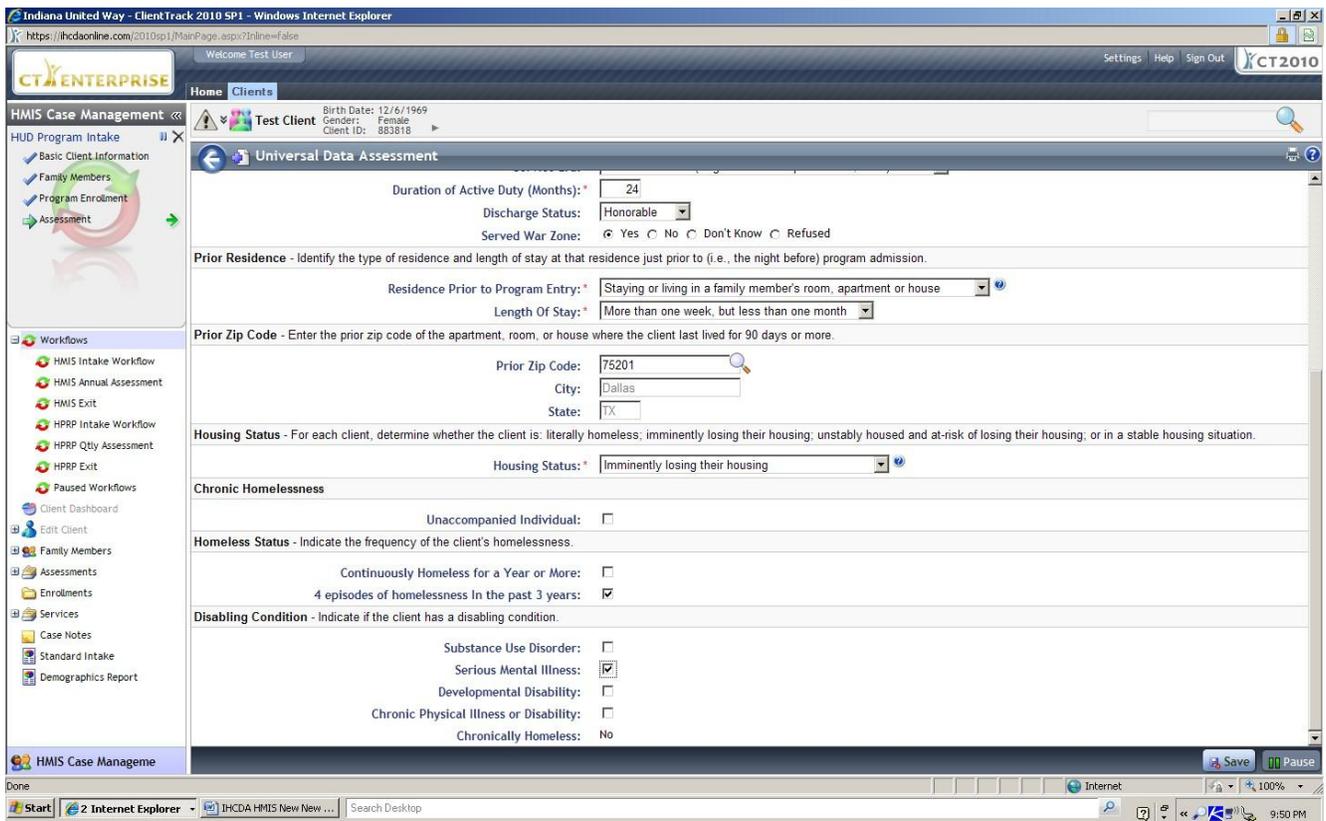
Length of Stay – Identify the length of stay for the residence prior to program entry.

Prior Zip Code – Remember this is the *zip code of the client's last permanent residence of 90 days or more*. The system allows you to look up the zip code if the client knows the city, but not the specific zip code. Click on the look up icon and type in the city and state and a list of potential matches will be displayed. Choose one of the zip codes from list provided.

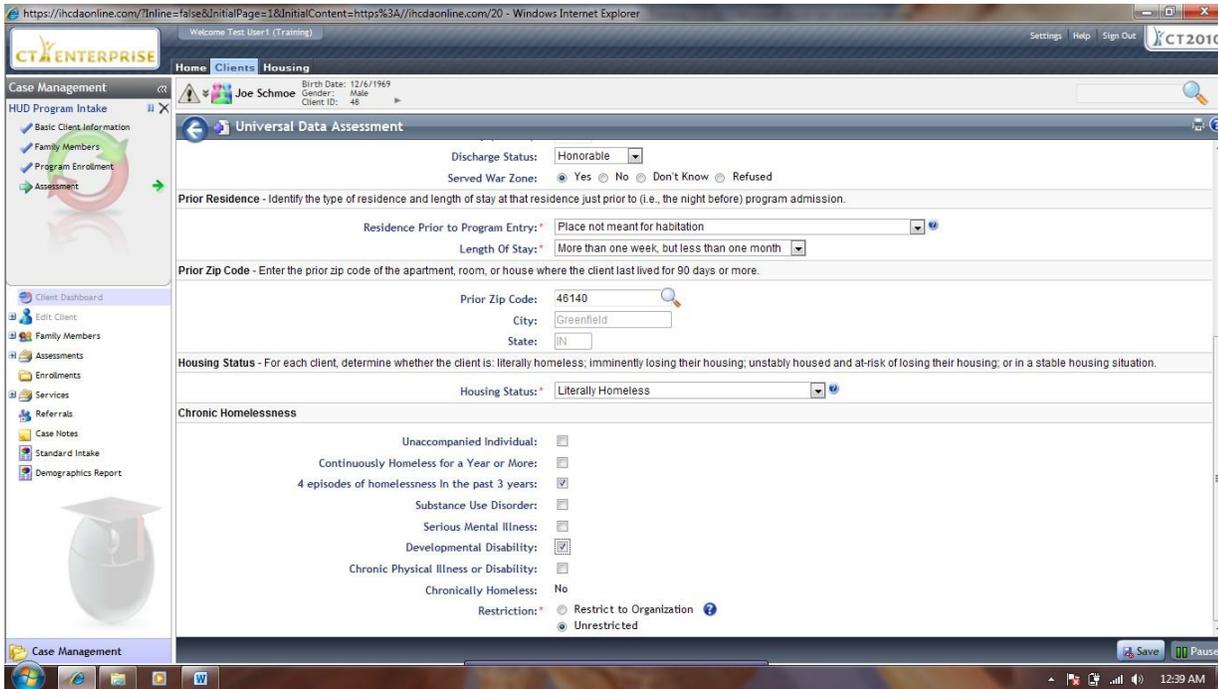


Housing Status – Choose the appropriate category for the housing status of the household. More extensive definitions can be found by clicking the blue information circle next to the drop down box.

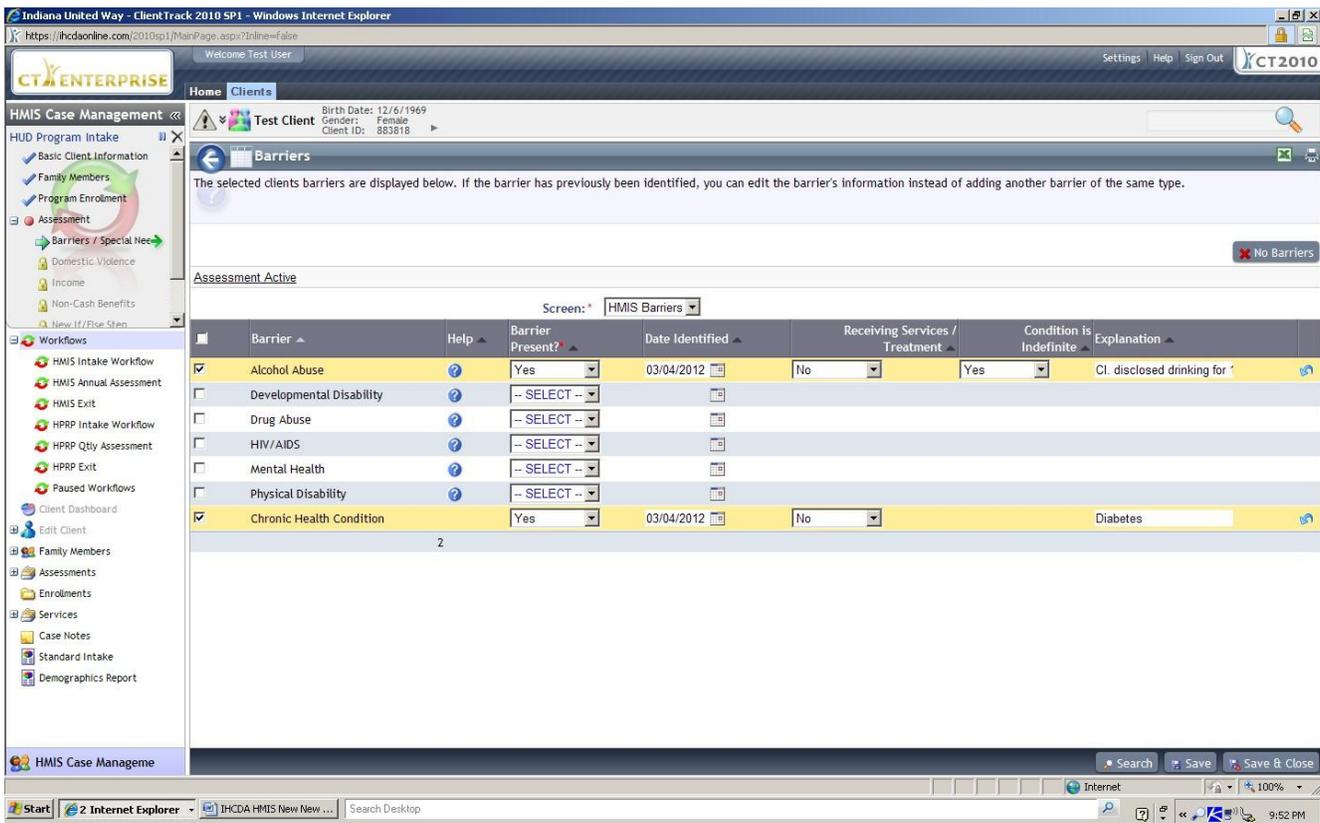
Chronic Homeless Assessment - In order for a client to be chronically homeless, they must be unaccompanied; and continually homeless for a year or more or 4 episodes of homelessness in a 3 year period; and have a substance abuse disorder, serious mental illness, developmental disability or a chronic physical illness or disability. When the qualifying conditions are checked appropriately, the system will indicate the client's status of chronically homeless.



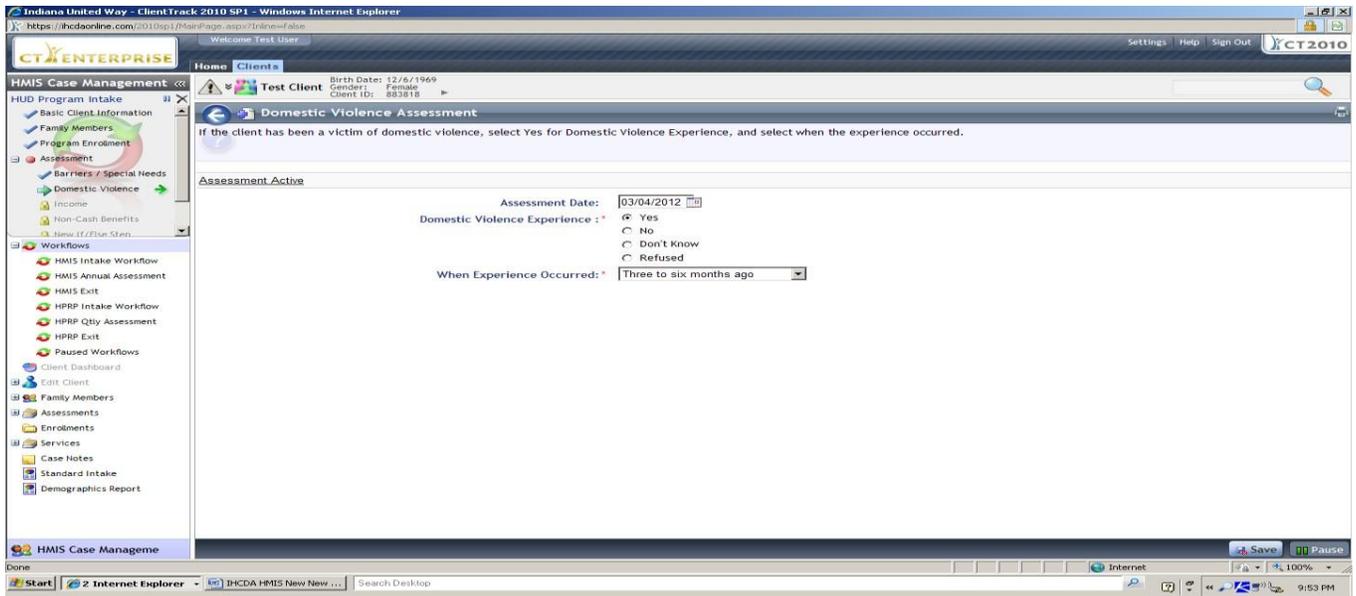
Once the Universal Data Assessment is complete, click Save.



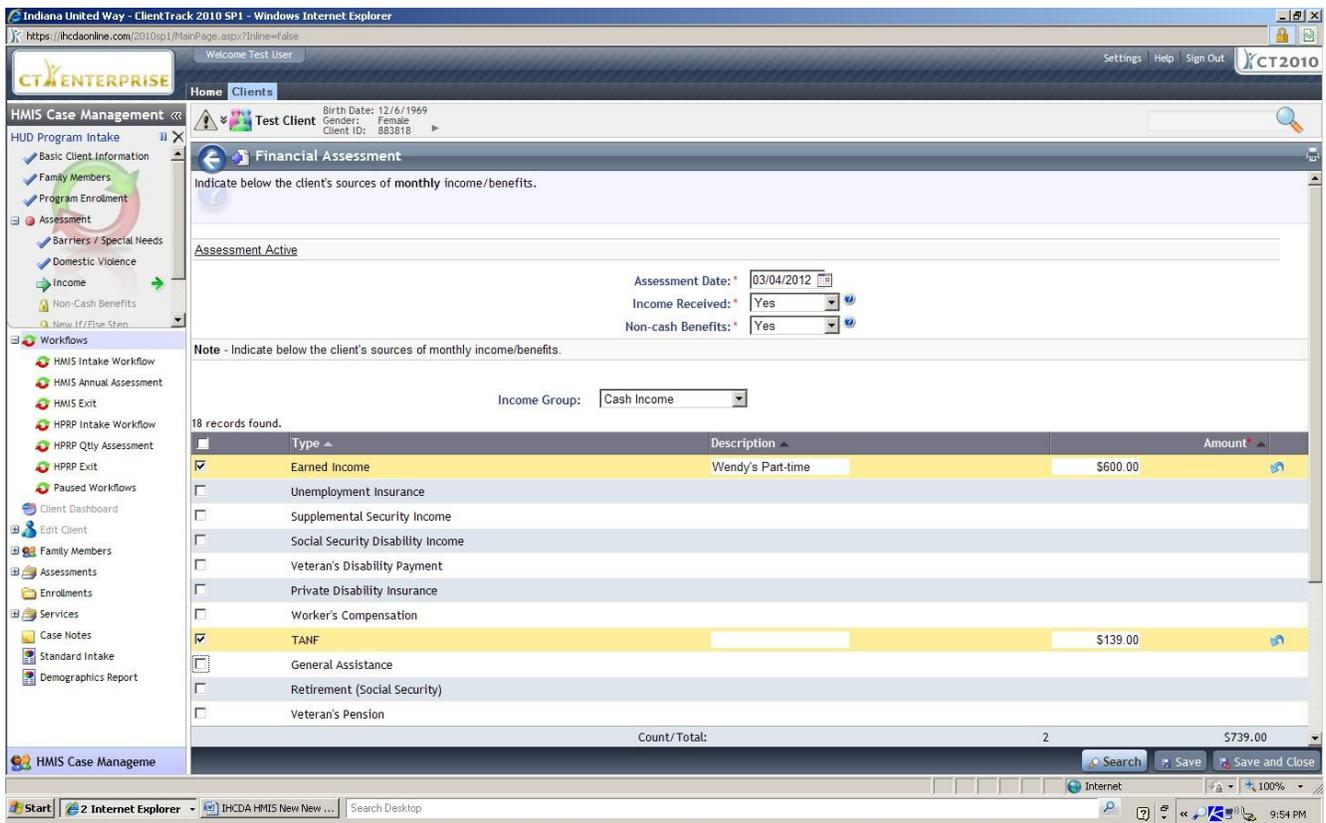
You will now be required to complete the HMIS Barriers assessment. Again, the built in logic may create additional fields that are required. All fields with a red * are required. If the client has no barriers, click on the No Barriers button in the upper right hand corner. It is important to keep in mind that clients must have at least one barrier to be eligible for some programs (such as shelter plus care). Click Save & Close when complete.



The Domestic Violence Assessment:



Income/Financial Assessment Case Income – An Income Assessment will be completed for EACH household member. Income received by a household member such as child support, TANF, WIC and food stamps should be designated on the assessment of the household member that directly receives payment. If an adult receives an SSI or SSDI benefit on behalf of a child, that income should be designated on the income assessment of the child. It is very important that income (cash or non-cash) is properly designated on the proper client assessment.



Earned Income – Employment income

Unemployment Insurance – Unemployment benefits from the State

Supplemental Security Income –

Veteran’s Disability Payment – Disability payment provided by the Department of Veteran’s Affairs

Private Disability Insurance – Non-government funded disability payments

Worker’s Compensation – Income for individual that has been injured on the job

TANF –Temporary Assistance for Needy Families

General Assistance – Cash from family or friends, trustee or church/non-profit

Retirement (Social Security) – Income payment provided by government for individuals that qualify

Veteran’s Pension – Cash payment made by the Department of Veteran’s Affairs

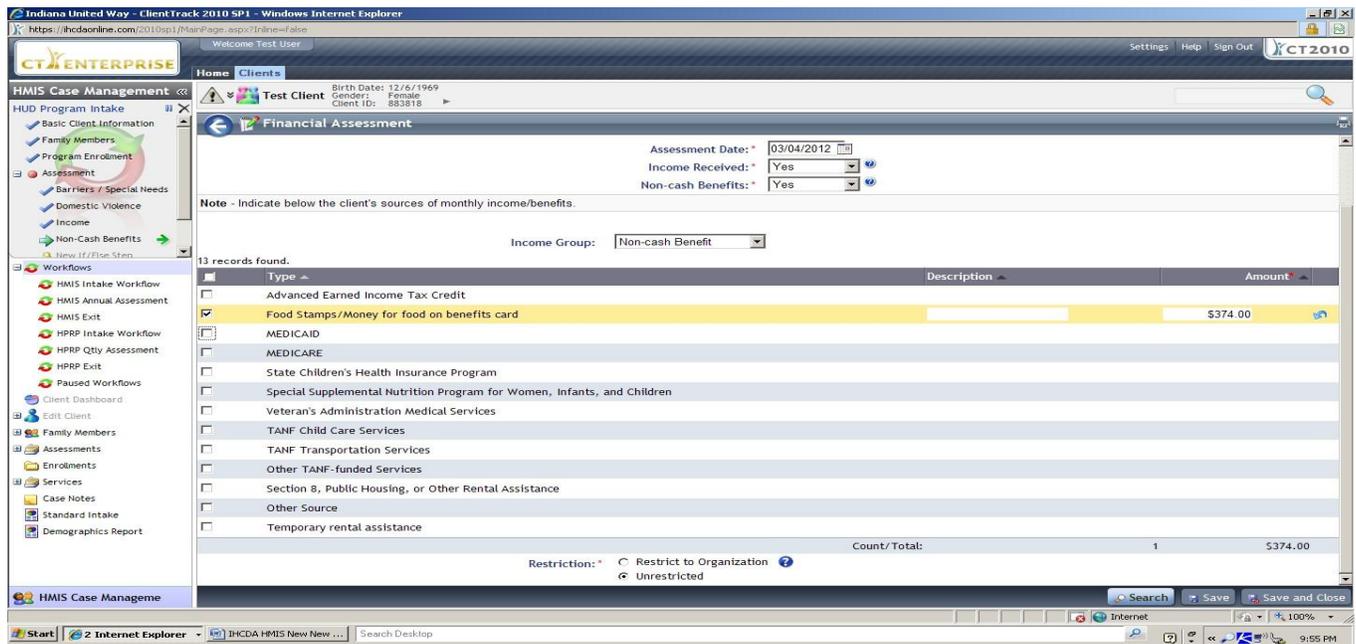
Other Pension – Cash payment made from a private employer

Child Support – Income received from one parent to another to care for children

Alimony –

Other Income –

Income/Financial Assessment Non-Cash Benefits - specific to individual – not the household in general. An assessment for non-cash benefits will be completed for each household member.



Advanced Earned Income Tax Credit – Monthly payments provided to individual in advance in a tax refund,

Food Stamps (Snaps) –

Medicaid –

Medicare –

State Children’s Health Insurance Program (SCHIP) –

Special Supplemental Nutrition Program for Women, Infants and Children (WIC) –

TANF Child Care Services –

TANF Transportation Services –

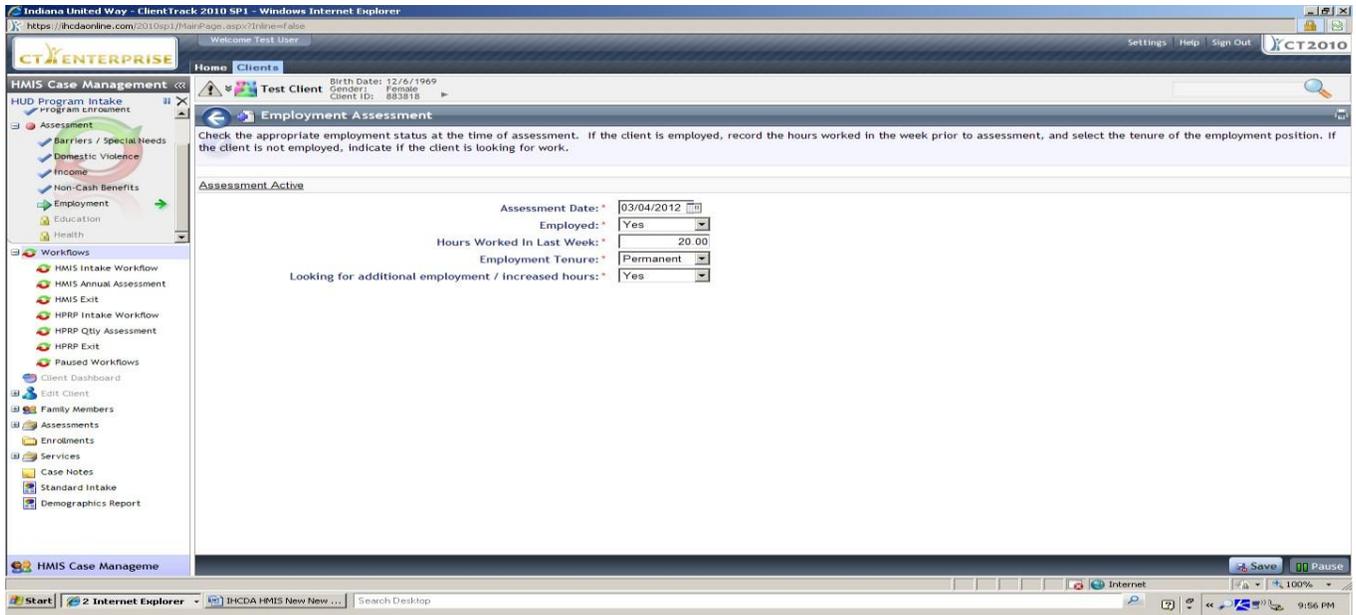
Other TANF-funded Services –

Section 8, Public Housing or Other Rental Assistance –

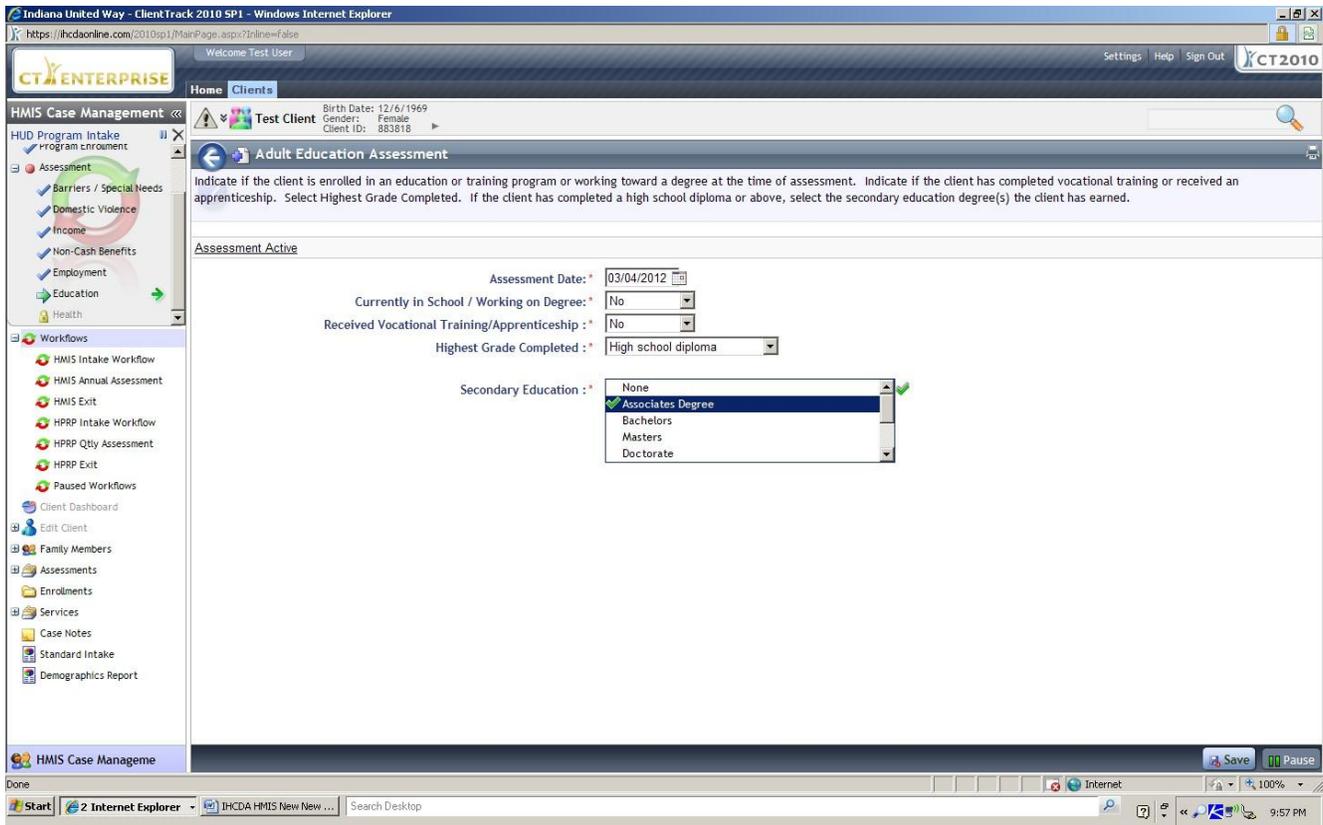
Other Source –

Temporary Rental Assistance –

Employment Assessment



Adult Education Assessment:



Health Assessment:

The screenshot shows the 'Health Assessment' form in the CT2010 system. The client information at the top includes: Birth Date: 12/6/1969, Gender: Female, Client ID: 883818. The form title is 'Health Assessment' with a sub-header 'Assessment Active'. The main instruction reads: 'Select the appropriate general health status. If the client is female, you will need to select the appropriate pregnancy status. If the client is pregnant, you will need to record the due date.' The form contains the following fields:

- Assessment Date: 03/04/2012
- General Health Status: Good (dropdown menu)
- Pregnancy Status: Radio buttons for Yes, No, Don't Know, and Refused.
- Pregnancy Due Date: 07/04/2012

The left sidebar shows a navigation menu with categories: Assessment (with sub-items: Barriers / Special Needs, Domestic Violence, Income, Non-Cash Benefits, Employment, Education, Health), Workflows (with sub-items: HMIS Intake Workflow, HMIS Annual Assessment, HMIS Exit, HPRP Intake Workflow, HPRP Qty Assessment, HPRP Exit), and Paused Workflows. Other menu items include Client Dashboard, Edit Client, Family Members, Assessments, Enrolments, Services, Case Notes, Standard Intake, and Demographics Report. The bottom of the browser window shows the taskbar with 'Internet Explorer' and the system clock at 9:58 PM.

Begin enrollment process for the child and/or other household members:

The screenshot shows the 'Enroll Family Member?' form in the CT2010 system. The client information at the top includes: Birth Date: 12/6/1969, Gender: Female, Client ID: 883818. The form title is 'Enroll Family Member?'. The main instruction reads: 'Do you wish to enroll Testing Client into the program?'. The form contains two radio button options:

- Yes (with a green checkmark icon)
- No (with a red X icon)

The left sidebar shows a navigation menu with categories: Basic Client Information, Family Members, Program Enrolment, Assessment, and Testing Client (with sub-item: Enroll Family Member?). The 'Workflows' section is also visible. The bottom of the browser window shows the taskbar with 'Internet Explorer' and the system clock at 9:59 PM.

Universal Data Assessment:

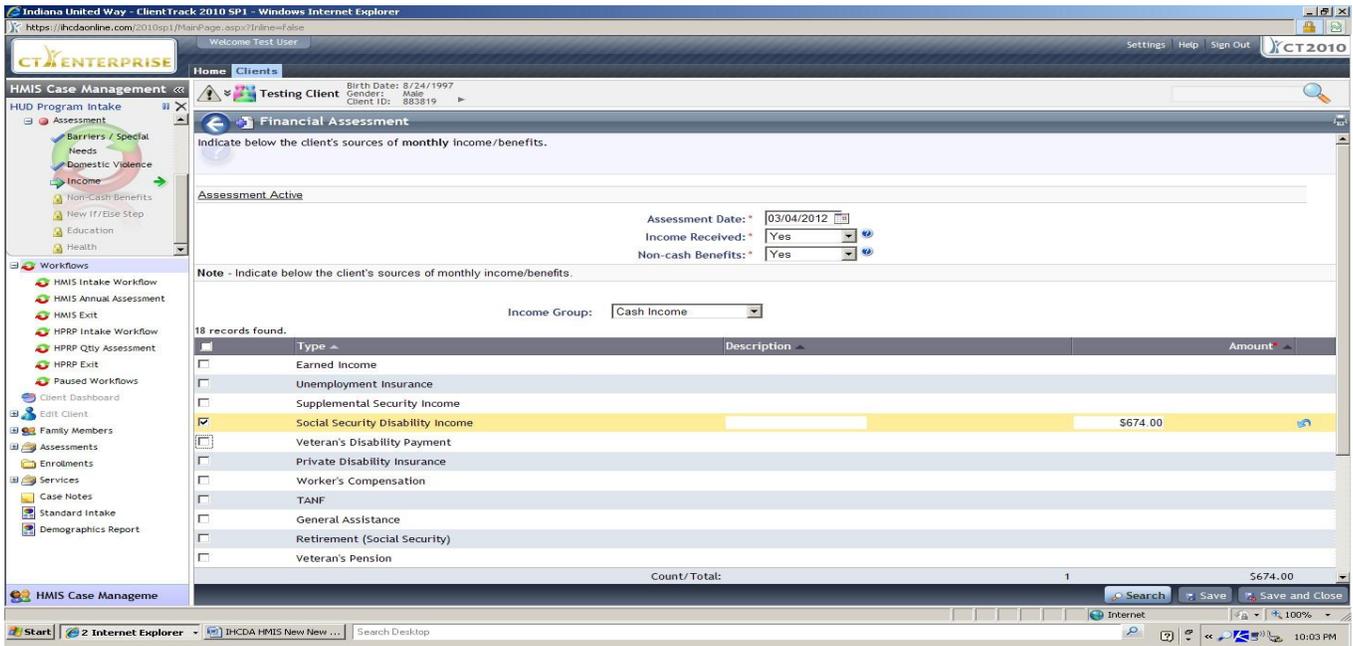
The screenshot shows the 'Universal Data Assessment' form in the CT ENTERPRISE system. The client is identified as 'Testing Client' with birth date 8/24/1997, gender Male, and client ID 883819. The assessment date is 10/3/2012. The program is 'Aurora - Shelter Plus Care Program (PH-R12-S2)'. The assessment type is 'E'. The assessor is 'Test User'. The discharging condition is 'Yes', and the veteran status is 'No'. The residence prior to program entry is 'Staying or living in a family member's room, apartment or house', with a length of stay of 'More than one week, but less than one month'. The prior zip code is '00000'. The housing status is 'Immediately losing their housing'.

HMIS Barriers:

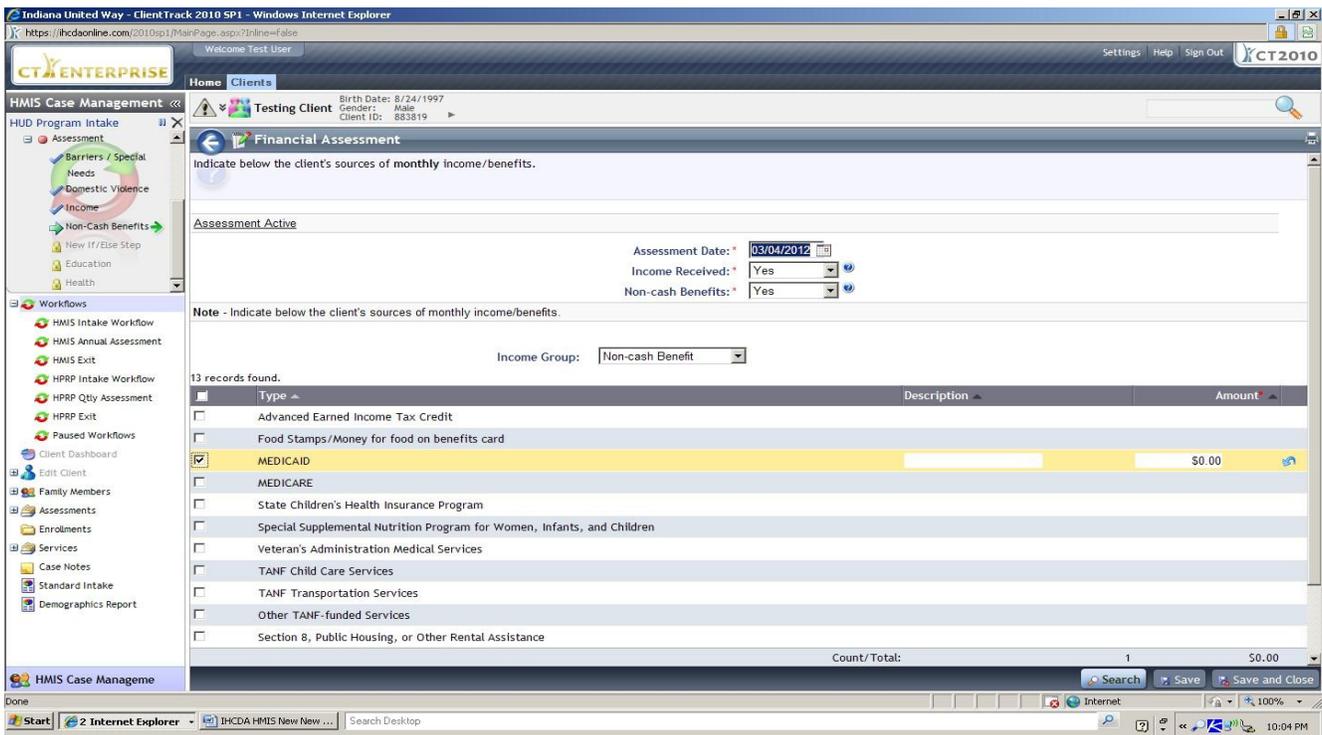
The screenshot shows the 'HMIS Barriers' table in the CT ENTERPRISE system. The table lists various barriers for the client, including Alcohol Abuse, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, Physical Disability, and Chronic Health Condition. The table includes columns for Barrier, Barrier Present?, Date Identified, Receiving Services / Treatment, and Condition is Indefinite. The Chronic Health Condition barrier is marked as present and has a date identified of 03/04/2012, with a note 'Cystic fibrosis' in the explanation column.

Barrier	Barrier Present?	Date Identified	Receiving Services / Treatment	Condition is Indefinite	Explanation
Alcohol Abuse	-- SELECT --				
Developmental Disability	6	3			
Drug Abuse	6	3			
HIV/AIDS	6	3			
Mental Health	@	3			
Physical Disability	6	3			
Chronic Health Condition	Yes	03/04/2012	Yes		Cystic fibrosis

Income/Financial Assessment - Remember this is the financial assessment for the second household member (and in this case, a child). Children are typically only going to have minimal options on this list such as SSI (death benefits). TANF, Food Stamps and Child Support remain as income for the parent/guardian – not the child.



Income/Financial Assessment Non-Cash Benefits - specific to individual – not the household. An Income Assessment will be completed for each household member. Again, there are limited selections that will pertain to children (Medicaid, SCHIP).



Child Education Assessment:

The screenshot shows the 'Child Education Assessment' form in the CT ENTERPRISE system. The form is titled 'Child Education Assessment' and includes instructions: '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.'

The form fields are as follows:

- Assessment Date: 03/04/2012
- Highest Grade Completed: 7th Grade or 8th Grade
- Current Enrollment Status: Yes, No, Don't Know, Refused
- Type of School: Public School
- School Name: ACME Junior High School
- Connected with McKinney-Vento School Liaison?: Yes
- Comments: Transportation is arranged through local MV liaison. Contact number is 317-555-5555.

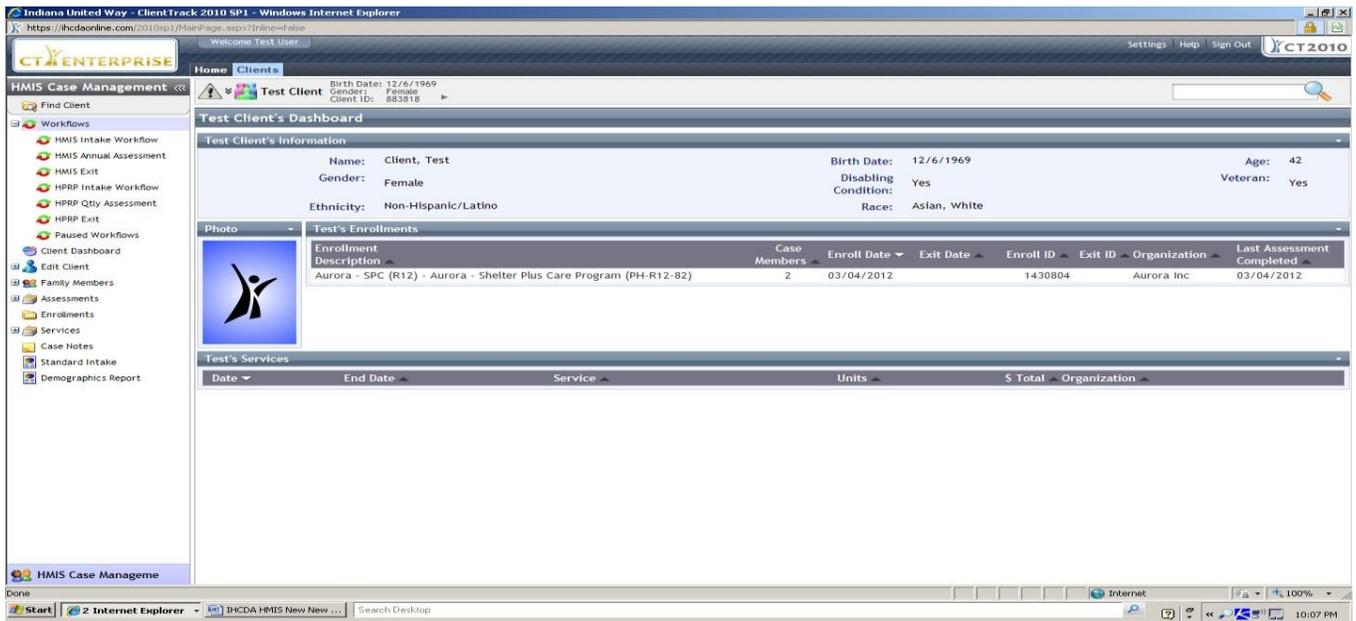
The form also includes 'Save' and 'Pause' buttons at the bottom right.

All steps for the assessment and enrollment process have been completed.

The screenshot shows the 'All required steps have been completed' screen in the CT ENTERPRISE system. The screen displays the text 'All required steps have been completed.' and a 'Finish' button.

The form also includes a 'Finish' button at the bottom center.

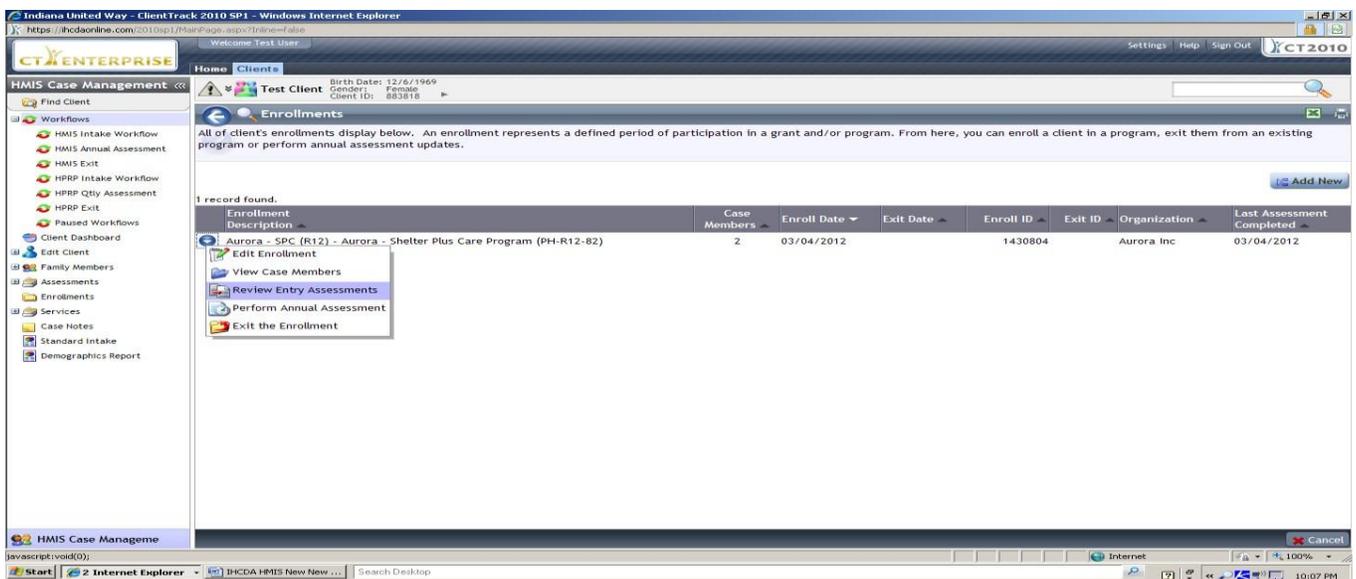
Upon clicking the "Finish" button, you will be redirected to the Dashboard for the Head of Household. It is from this screen you will begin to add services and case notes regarding the HMIS Program Enrollment.

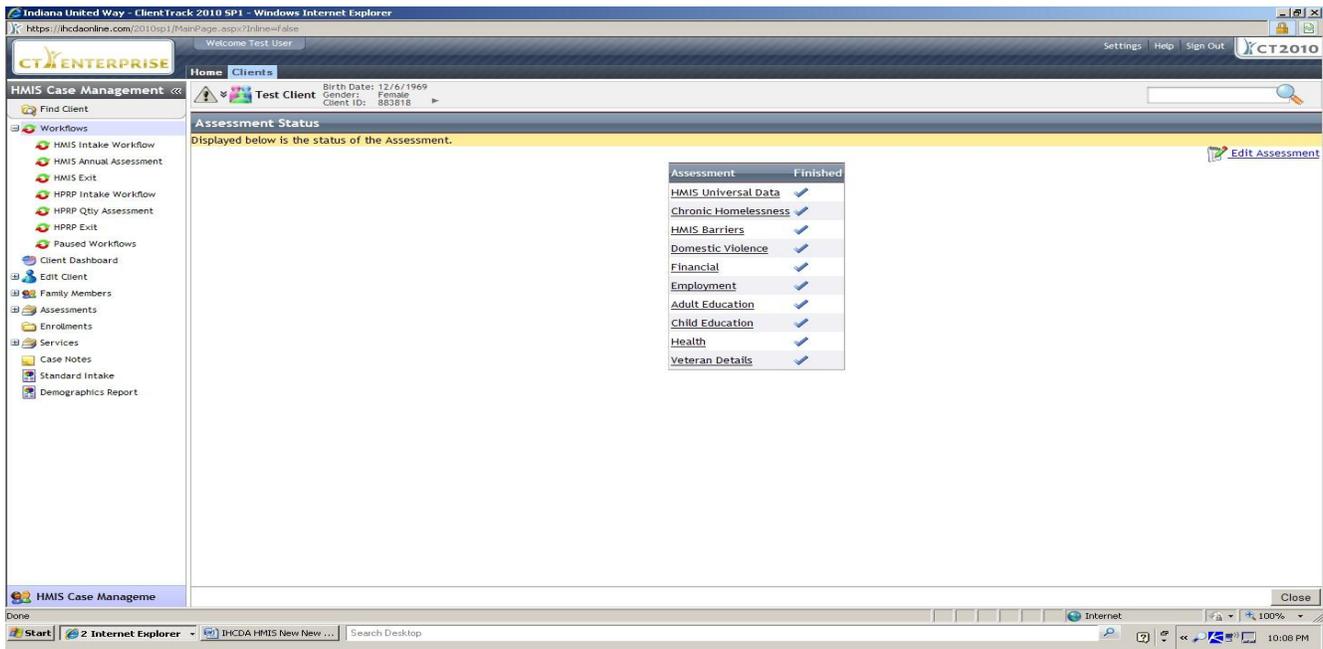


The Client Dashboard provides you with a great deal of information regarding the client. You can verify the basic client demographics, see the enrollment in a particular program, number of case members, enrollment date, the associated organization and when their last Assessment has been completed. It will also provide you with an “at a glance” look at the most services the client has received.

While you will have the option on many screens for a “Don’t Know or Refused” option – which may be valid at time of intake – it is expected that as information is collected during the program enrollment the client information/assessments will be updated. The screen shots that follow will help you access a previously completed assessment should you need to make corrections.

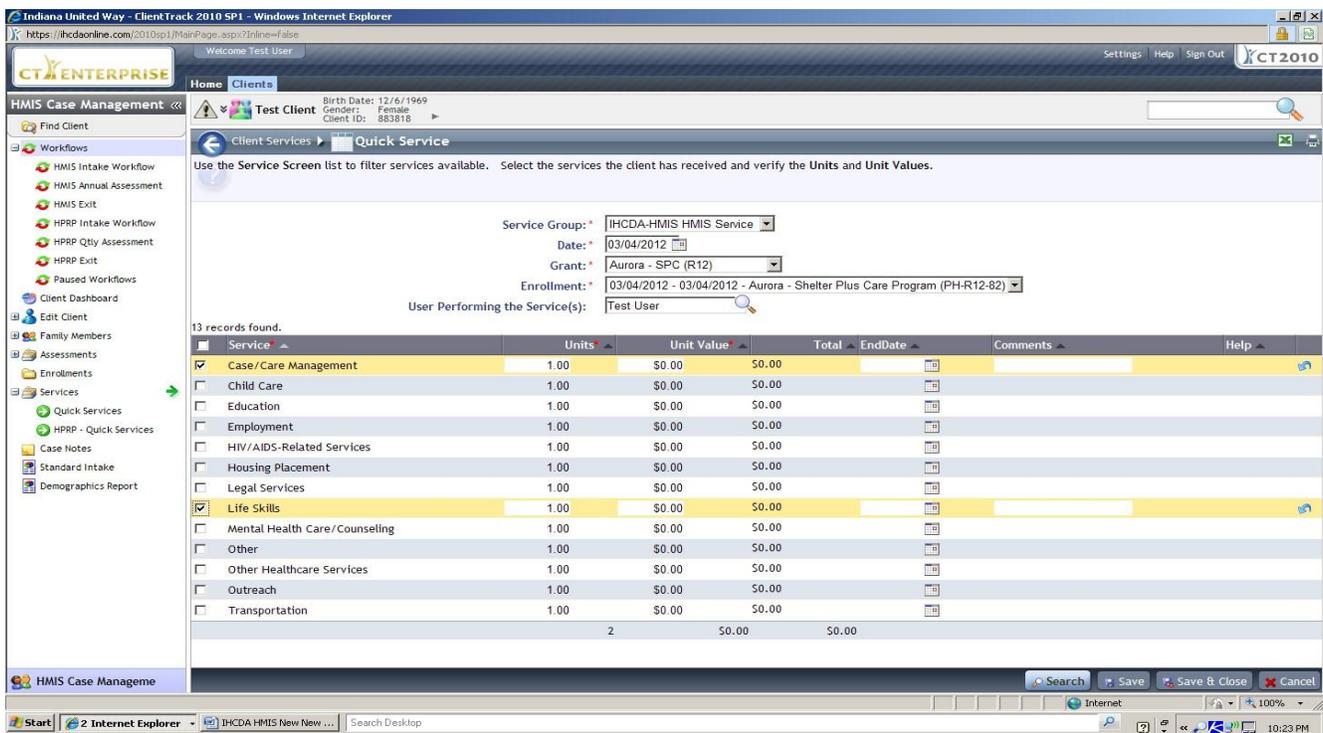
Click on the Enrollment menu item on the left. Choose the enrollment that needs to be edited and click on the blue circle to produce a drop down menu. You can either edit the enrollment (maybe the date needs to be changed); View Case Members associated with the enrollment, Review Entry Assessments or Review Exit Assessments. Do not use this screen to perform and Annual Assessment or Exit the Enrollment – These actions should ONLY be performed by using a workflow.





As you can see when you select “Review Entry Assessments”, all required assessment have been completed. For instance, if a client does not disclose at entry they are receiving food stamps but you find out soon after their enrollment, you would want to EDIT the Financial Assessment. However, if the client BEGINS receiving food stamps while enrolled in your program (1-2 months later); do NOT edit the entry assessment. This is a time to complete an Annual Assessment (even though it may not be a true annual assessment).

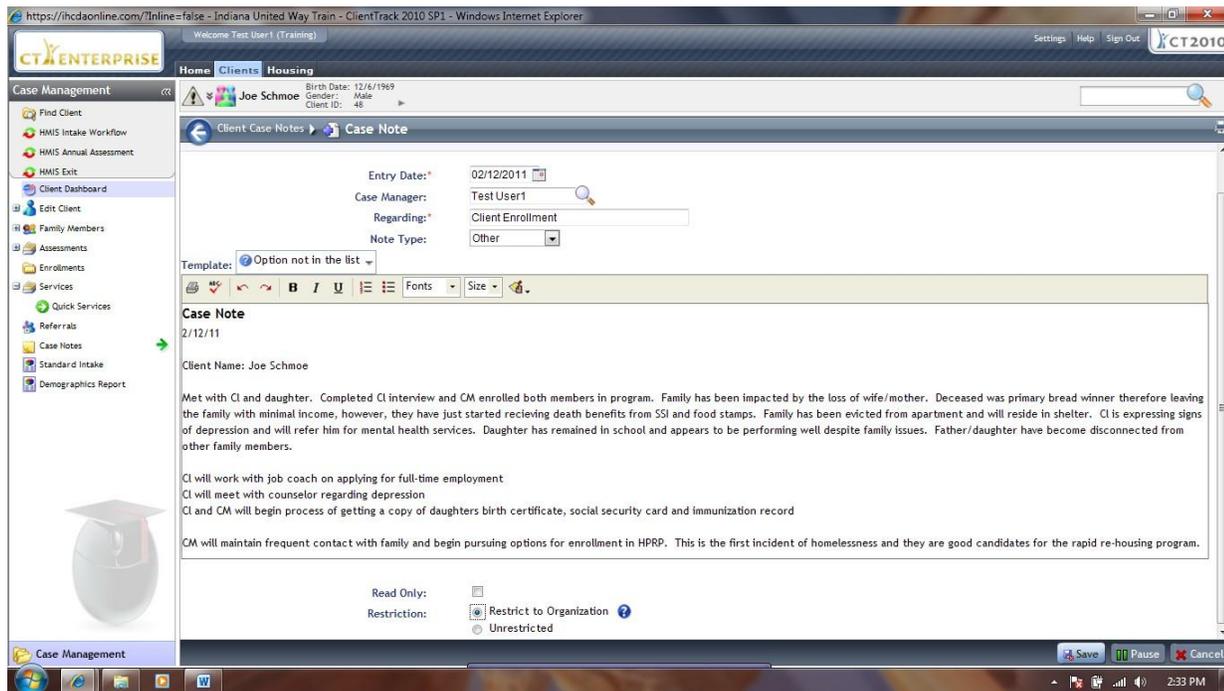
Adding Services – You will have the option to Add Quick Services (for use when you are adding multiple services for a client that were performed on the same day). For services that may require some additional information, use the Add New button.



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 and other relevant information regarding your client is properly documented in their case notes. In order to add case notes, click on the Case Notes Menu Item on the left of the screen. Click on the Add New button on the upper right hand side of the screen. Remember, these case notes will be restricted to case managers in your organization so if you are apt to use abbreviations, make sure others in your agency will be able to decipher what you have written. While ClientTrack will eventually provide a date in the body of the case note, it is also good practice to add the date in your case note.

Here is an example:



The screenshot displays the ClientTrack 2010 SP1 web application interface. The browser address bar shows the URL: https://hcdonline.com/Inline=false - Indiana United Way Train - ClientTrack 2010 SP1 - Windows Internet Explorer. The user is logged in as 'Test User1 (Training)'. The main navigation menu includes 'Home', 'Clients', and 'Housing'. The 'Case Management' sidebar contains various options like 'Find Client', 'HMIS Intake Workflow', 'HMIS Annual Assessment', 'HMIS Exit', 'Client Dashboard', 'Edit Client', 'Family Members', 'Assessments', 'Enrollments', 'Services', 'Quick Services', 'Referrals', 'Case Notes', 'Standard Intake', and 'Demographics Report'. The 'Case Note' form is open for 'Joe Schmoe' (Birth Date: 12/6/1969, Gender: Male, Client ID: 48). The form fields include: Entry Date: 02/12/2011, Case Manager: Test User1, Regarding: Client Enrollment, and Note Type: Other. The 'Case Note' text area contains the following content: '2/12/11', 'Client Name: Joe Schmoe', 'Met with CI and daughter. Completed CI interview and CM enrolled both members in program. Family has been impacted by the loss of wife/mother. Deceased was primary bread winner therefore leaving the family with minimal income, however, they have just started receiving death benefits from SSI and food stamps. Family has been evicted from apartment and will reside in shelter. CI is expressing signs of depression and will refer him for mental health services. Daughter has remained in school and appears to be performing well despite family issues. Father/daughter have become disconnected from other family members.', 'CI will work with job coach on applying for full-time employment', 'CI will meet with counselor regarding depression', 'CI and CM will begin process of getting a copy of daughters birth certificate, social security card and immunization record', and 'CM will maintain frequent contact with family and begin pursuing options for enrollment in HPRP. This is the first incident of homelessness and they are good candidates for the rapid re-housing program.' The form also includes a 'Read Only' checkbox (unchecked) and a 'Restriction' dropdown menu set to 'Restrict to Organization'.

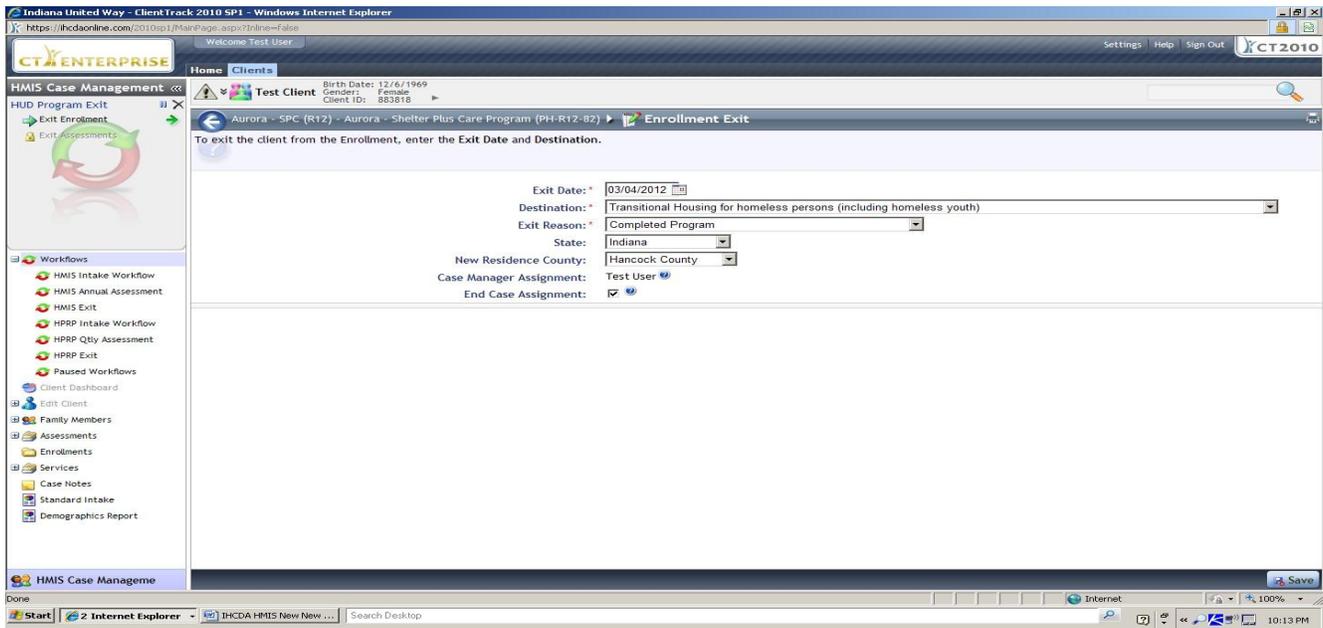
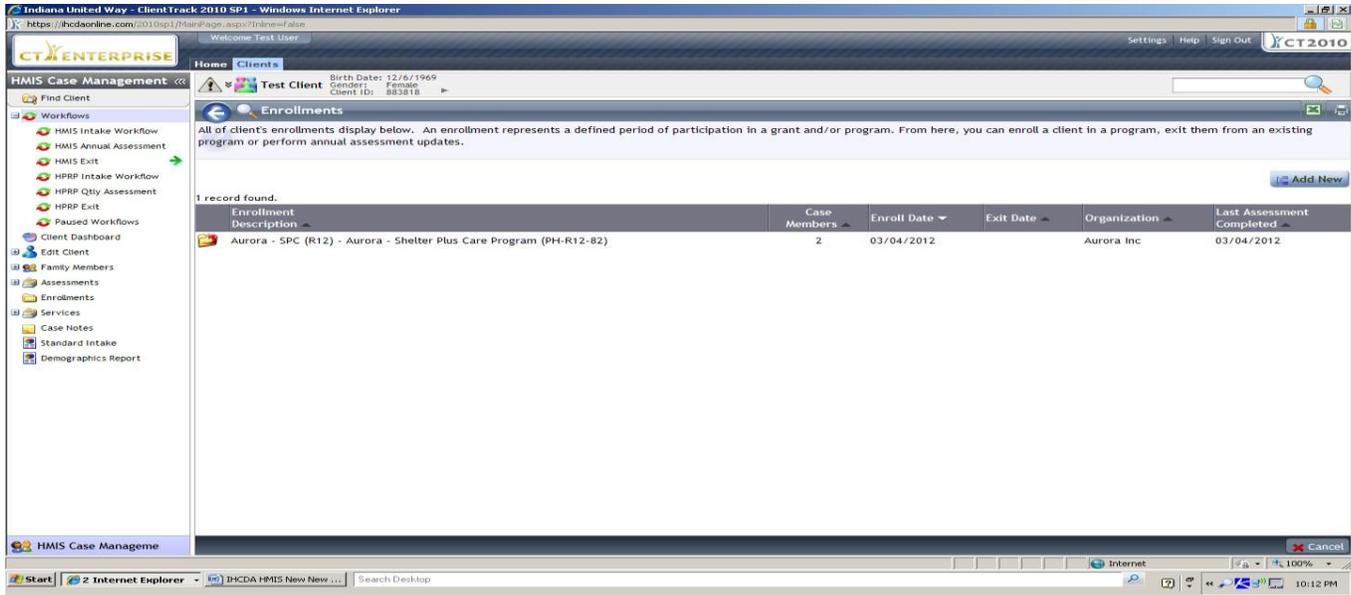
Annual Assessment – For clients that spend longer periods of time in your program, you now have access to an “Annual Assessment”. This assessment is now required if you have clients in your program for a year or longer. You may also want to complete this assessment if you have a new member (birth of a child) to the household or if someone in the household departs (divorce) your program. You can also use this workflow to track and maintain significant changes to a household income, etc. For your convenience, the assessment has been developed as a workflow with the following steps:

1. Verify and make any necessary changes to basic client information
2. Verify and make any necessary changes to family information
3. Master Assessment – During Program Enrollment is completed
 - a. Review of HMIS Barriers
 - b. Income (Cash and Non-Cash)
 - c. Employment
 - d. Loop through household members
 - e. Review of HMIS Barriers

- f. Income (Cash and Non-Cash)
 - g. Education
4. Click Finish and you will be redirected to the Client Dashboard

Exit Client from a HUD Program (non-HPRP)

Once a client has completed or otherwise left your program, you will need to complete an HMIS Exit Assessment on all household members. Begin by clicking on the HMIS Exit Workflow in the upper left hand side of the screen. When you get to this screen, click on the manila folder icon next to the enrollment. This will start the process.



Complete the questions. Click Save.

HMIS Barriers:

The selected clients barriers are displayed below. If the barrier has previously been identified, you can edit the barrier's information instead of adding another barrier of the same type.

Assessment Active

Screen: * HMIS Barriers

Barrier	Help	Barrier Present?	Date Identified	Receiving Services / Treatment	Condition is Indefinite	Explanation
<input checked="" type="checkbox"/> Alcohol Abuse	?	Yes	03/04/2012	Yes	Yes	Cl. disclosed drinking for...
<input type="checkbox"/> Developmental Disability	?	-- SELECT --				
<input type="checkbox"/> Drug Abuse	?	-- SELECT --				
<input type="checkbox"/> HIV/AIDS	?	-- SELECT --				
<input type="checkbox"/> Mental Health	?	-- SELECT --				
<input type="checkbox"/> Physical Disability	?	-- SELECT --				
<input checked="" type="checkbox"/> Chronic Health Condition	?	Yes	03/04/2012	Yes		Diabetes

Count/Total: 2

Income/Financial Assessment (Cash and non-Cash):

Indicate below the client's sources of monthly income/benefits.

Assessment Active

Assessment Date: * 03/04/2012

Income Received: * Yes

Non-cash Benefits: * Yes

Note - Indicate below the client's sources of monthly income/benefits.

Income Group: Cash Income

18 records found.

Type	Description	Amount
<input checked="" type="checkbox"/> Earned Income	Wendy's Full time	\$1,200.00
<input type="checkbox"/> Unemployment Insurance		
<input type="checkbox"/> Supplemental Security Income		
<input type="checkbox"/> Social Security Disability Income		
<input type="checkbox"/> Veteran's Disability Payment		
<input type="checkbox"/> Private Disability Insurance		
<input type="checkbox"/> Worker's Compensation		
<input checked="" type="checkbox"/> TANF		\$139.00
<input type="checkbox"/> General Assistance		
<input type="checkbox"/> Retirement (Social Security)		
<input type="checkbox"/> Veteran's Pension		

Count/Total: 2 \$1,339.00

Indiana United Way - ClientTrack 2010 SP1 - Windows Internet Explorer

https://ihcdaonline.com(2010sp1)/MainPage.aspx?inline=false

Welcome Test User

Settings Help Sign Out CT2010

Home Clients

Test Client Birth Date: 12/6/1969 Gender: Female Client ID: 883818

Financial Assessment

Indicate below the client's sources of monthly income/benefits.

Assessment Active

Assessment Date: 03/04/2012
 Income Received: Yes
 Non-cash Benefits: Yes

Note - Indicate below the client's sources of monthly income/benefits.

Income Group: Non-cash Benefit

13 records found.

Type	Description	Amount
<input type="checkbox"/>	Advanced Earned Income Tax Credit	
<input checked="" type="checkbox"/>	Food Stamps/Money for food on benefits card	\$374.00
<input checked="" type="checkbox"/>	MEDICAID	\$0.00
<input type="checkbox"/>	MEDICARE	
<input type="checkbox"/>	State Children's Health Insurance Program	
<input type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children	
<input type="checkbox"/>	Veteran's Administration Medical Services	
<input type="checkbox"/>	TANF Child Care Services	
<input type="checkbox"/>	TANF Transportation Services	
<input type="checkbox"/>	Other TANF-funded Services	
<input type="checkbox"/>	Section 8, Public Housing, or Other Rental Assistance	

Count/Total: 2 \$374.00

Search Save Save and Close

Employment Assessment:

Indiana United Way - ClientTrack 2010 SP1 - Windows Internet Explorer

https://ihcdaonline.com(2010sp1)/MainPage.aspx?inline=false

Welcome Test User

Settings Help Sign Out CT2010

Home Clients

Test Client Birth Date: 12/6/1969 Gender: Female Client ID: 883818

Employment Assessment

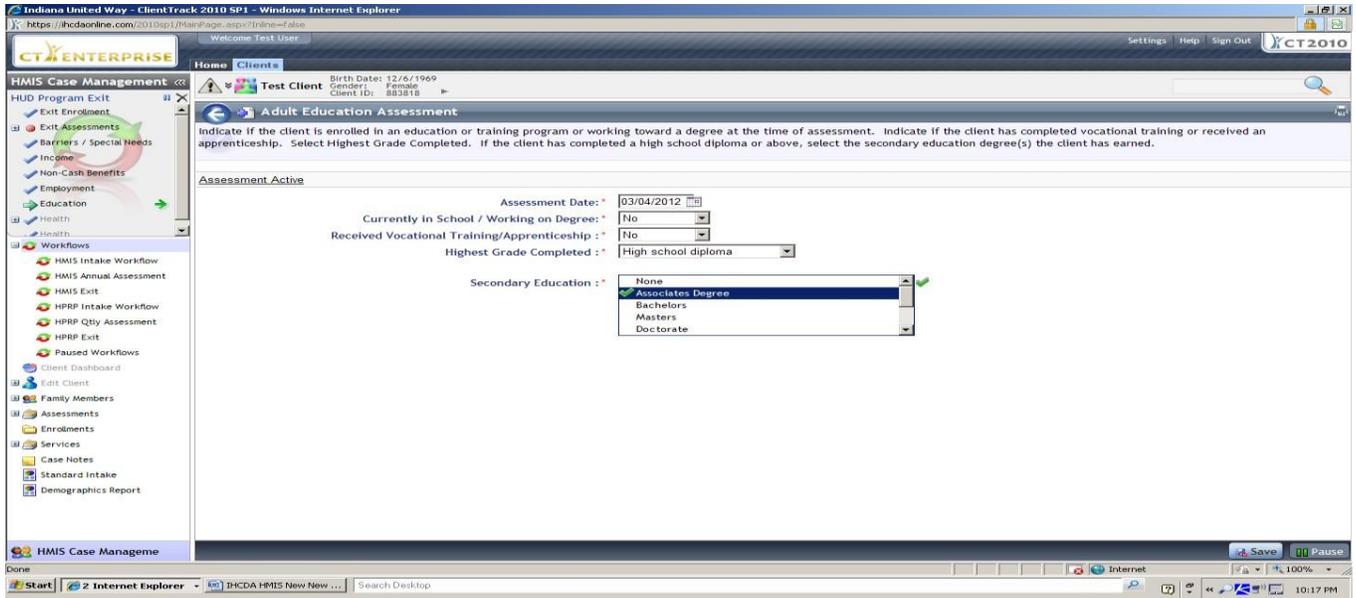
Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week prior to assessment, and select the tenure of the employment position. If the client is not employed, indicate if the client is looking for work.

Assessment Active

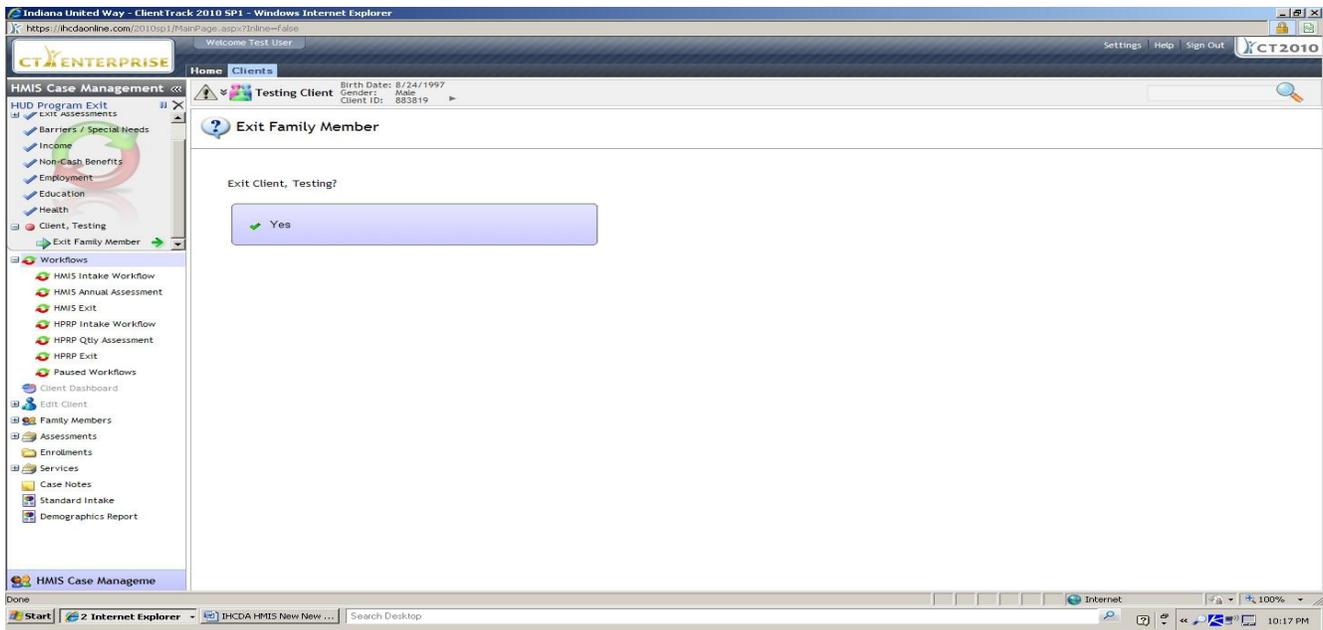
Assessment Date: 03/04/2012
 Employed: Yes
 Hours Worked in Last Week: 40.00
 Employment Tenure: Permanent
 Looking for additional employment / increased hours: No

Save Pause

Education Assessment:



Exit other Household Members:



Follow the steps in the workflow until you get to the Finish Button. You will see the enrollment and exit dates on the client dashboard.

The screenshot displays the 'Test Client's Dashboard' in the CT Enterprise HMIS Case Management system. The interface includes a navigation menu on the left with options like 'Find Client', 'Workflows', and 'Dashboard'. The main content area is divided into sections: 'Test Client's Information' and 'Test Client's Enrollments'.

Test Client's Information:

- Name: Client, Test
- Gender: Female
- Ethnicity: Non-Hispanic/Latina
- Birth Date: 12/6/1969
- Disabling Condition: Yes
- Race: Asian, White
- Age: 42
- Veteran: Yes

Test Client's Enrollments:

MemC:	Enroll Date	Exit Date	In no III	Exl 10	Org4mzat10n	ment
	03/04/2012	03/04/2012	1430804	1430806	Aurora Inc	03/04/2012

The enrollment entry is 'Aurora - SPC (R12) - Aurora - Shelter Plus Care Program (PHR12-82)'. A blue box highlights the 'Enroll Date' and 'Exit Date' columns. At the bottom of the dashboard, there is a table with columns for 'Date...', 'End Date', 'Service', 'Units', 'Total', and 'Organization'.