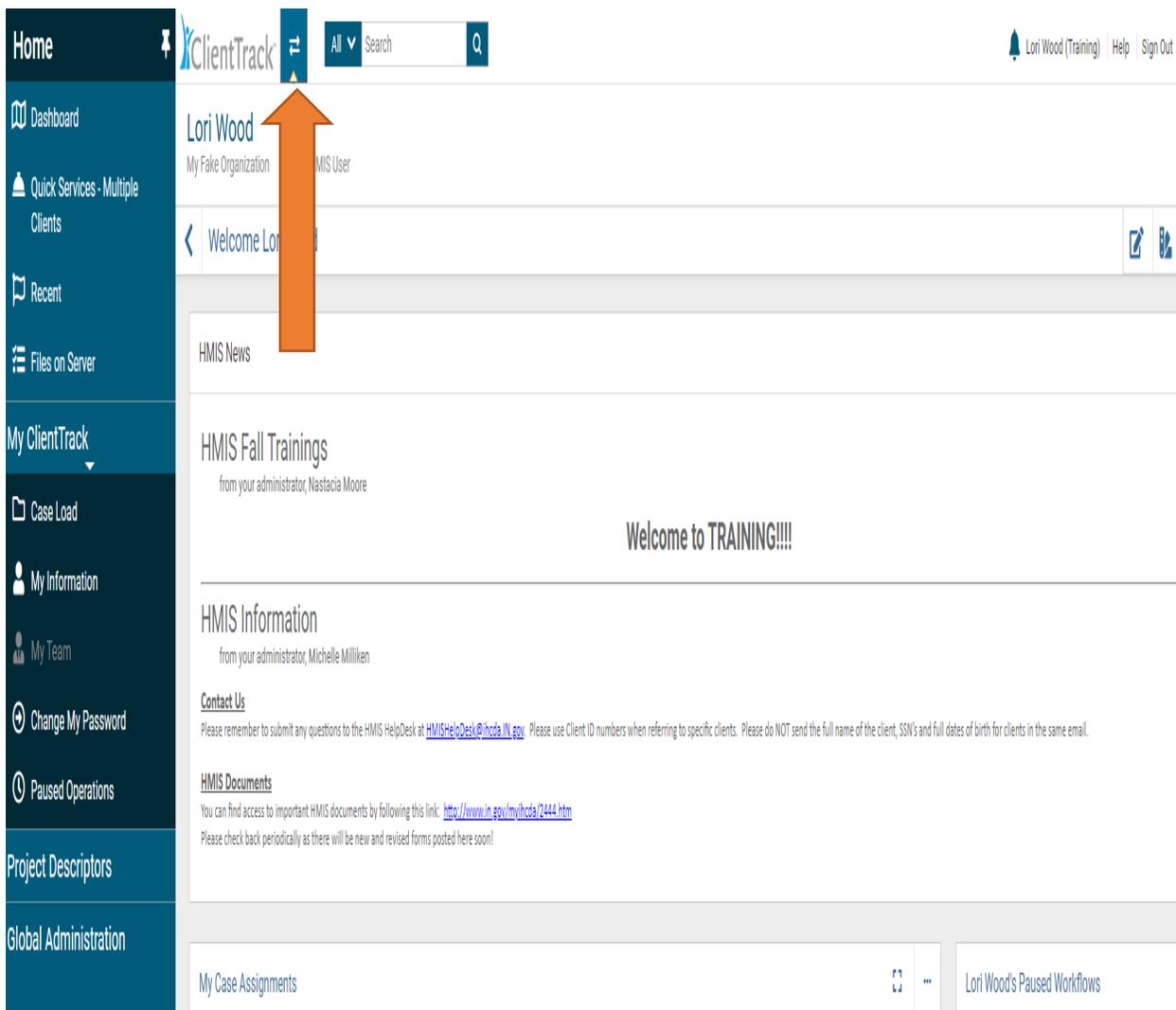


## How to Guide for Accessing Reports in ClientTrack 19 System

The ClientTrack 19 Upgrade offers a new, improved and simpler navigation process. The How to Guide was created to assist HMIS and DV ClientTrack users with accessing reports in ClientTrack 19.

A new “Reports” workspace is now available and can be accessed by executing the following steps:

1. Log in to the system using your log in credentials (User name and password)
2. From the “Home” workspace, move the cursor to the “double arrow” icon located to the right of the “ClientTrack” logo at the top of the page and “click”.

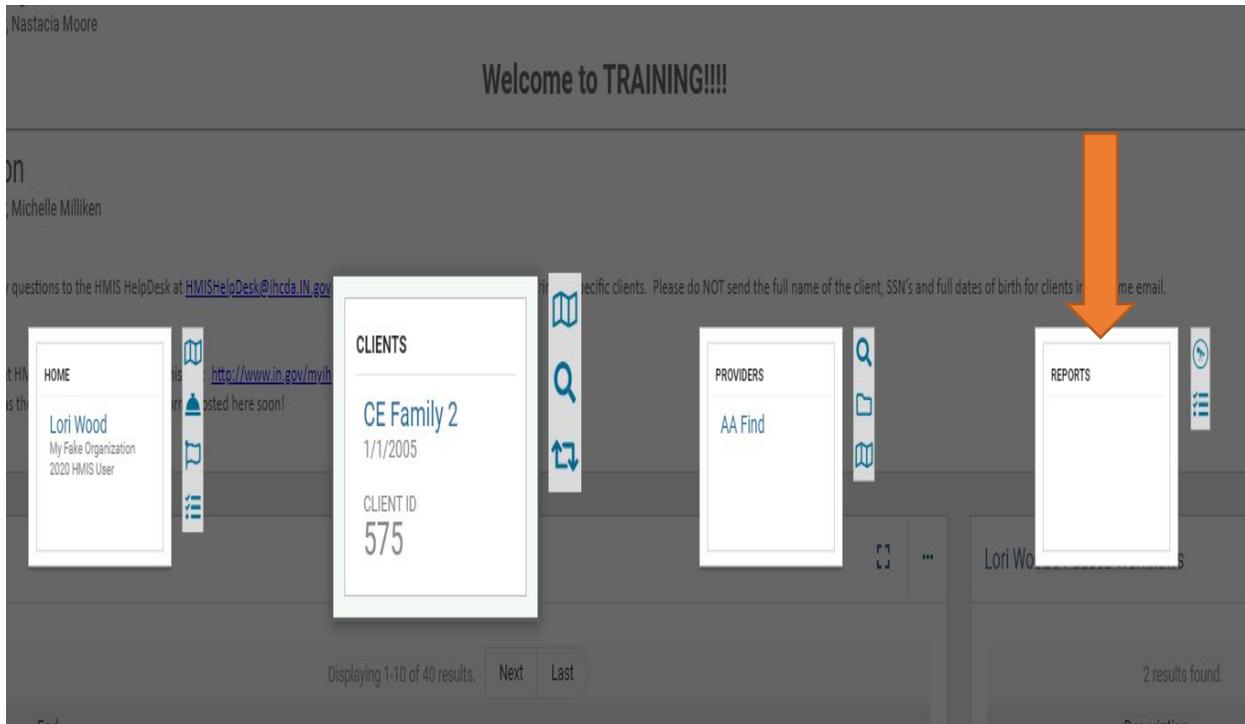


The screenshot displays the ClientTrack 19 Home workspace. On the left is a dark blue navigation sidebar with the following menu items: Home, Dashboard, Quick Services - Multiple Clients, Recent, Files on Server, My ClientTrack (with a dropdown arrow), Case Load, My Information, My Team, Change My Password, Paused Operations, Project Descriptors, and Global Administration. The main content area has a white background. At the top left of this area is the ClientTrack logo, followed by a search bar containing 'All' and a search icon. To the right of the search bar is the user profile 'Lori Wood (Training) | Help | Sign Out'. Below the search bar, the user's name 'Lori Wood' is displayed with a double arrow icon to its right. An orange arrow points to this double arrow icon. Below the user name is a 'Welcome Lori' message. The main content area contains several sections: 'HMIS News', 'HMIS Fall Trainings' (with a sub-note 'from your administrator, Nastacia Moore'), a large 'Welcome to TRAINING!!!' message, 'HMIS Information' (with a sub-note 'from your administrator, Michelle Milliken'), 'Contact Us' (with a note about submitting questions to HMIS HelpDesk at [HMISHelpDesk@hcsda.in.gov](mailto:HMISHelpDesk@hcsda.in.gov)), and 'HMIS Documents' (with a link to <http://www.in.gov/myhcsda/2444.htm>). At the bottom of the page, there are sections for 'My Case Assignments' and 'Lori Wood's Paused Workflows'.

3. Move the cursor to the “>” symbol on the right side of the screen and “click”



4. The “Reports” workspace is now visible and may be accessed by clicking on the “Reports” box.



5. The "Reports" workspace is new and easier to navigate.

The screenshot shows the ClientTrack Reports workspace. At the top, there is a navigation bar with the ClientTrack logo, a search bar, and user information for Lori Wood (Training). A left-hand sidebar lists various report categories: Data Explorer, Files on Server, By Name Lists (with sub-items for Active Client List and BNL Veterans), HMIS Exports, HMIS Reports, Administrative Reports, Client Reports, Enrollment Reports, Referral Reports, Reports, Service Reports, and Other Reports. The main content area is titled "Welcome Lori Wood" and contains several sections: "HMIS News", "HMIS Fall Trainings" (with a sub-note from Nastacia Moore), a large "Welcome to TRAINING!!!!" message, "HMIS Information" (with a sub-note from Michelle Milliken), "Contact Us" (with a note about submitting questions to HMIS HelpDesk), and "HMIS Documents" (with a link to find important documents). Below these sections are two side-by-side panels: "My Case Assignments" and "Lori Wood's Paused Workflows". Both panels show a table header with columns for Client Name, Begin Date, End Date, Program, and Enrollment CaseID (for the first panel), and Workflow, Description, Started, and Accessed (for the second panel). Both panels currently display "No records found."

6. Move your cursor to the desired report category in the blue menu and “click”
7. For example, to access the “Client Reports” simply click on “Client Reports”
8. The menu will expand below and the respective “Client Reports” may be accessed by clicking on the report title

The screenshot shows the ClientTrack interface. On the left is a dark blue sidebar menu with the following categories: Reports, Data Explorer, Files on Server, By Name Lists, HMIS Exports, HMIS Reports, Administrative Reports, Client Reports (highlighted with an orange arrow), Client List, Client Demographics, Client Employment Status, Client Goals, Client Goal Action Plans, Client Barriers, Duplicated Clients, Employment Improvement, Goal Outcome, Enrollment Reports, Referral Reports, Reports, Service Reports, and Other Reports. The main content area is titled 'Bed Night Inventory and Utilization Report' and contains 'Saved Report Settings' instructions, a 'Date Range' section, an 'Organization(s)' section, and a 'Program(s)' section.

**Reports**  All

  **Bed Night Inventory and Utilization Report**

### Saved Report Settings

To use saved report settings, select the desired settings description. To appear in the list the next time you access this screen.

Saved R

### Date Range

Indicate the time period for this report. Only records that fall within the

F

### Organization(s)

Indicate which organizations should be included in the report by selecti

O

### Program(s)

Check the box to limit report results by selected programs. When check click the  icon to select all.

9. To view the "Client List" report, move the cursor to "Client List" and click

The screenshot displays the ClientTrack Reports interface. On the left is a dark blue sidebar with a 'Reports' header and a list of report categories and items. An orange arrow points to the 'Client List' item under the 'Client Reports' category. The main content area on the right shows the 'Bed Night Inventory and Utilization' report settings, including sections for 'Saved Report Settings', 'Date Range', 'Organization(s)', and 'Program(s)'.

**Reports**

ClientTrack

All Search

Data Explorer

Files on Server

By Name Lists

HMIS Exports

HMIS Reports

Administrative Reports

Client Reports

**Client List**

Client Demographics

Client Employment Status

Client Goals

Client Goal Action Plans

Client Barriers

Duplicated Clients

Employment Improvement

Goal Outcome

Enrollment Reports

Referral Reports

Reports

Service Reports

Other Reports

< Bed Night Inventory and Utilization

### Saved Report Settings

To use saved report settings, select the desired settings appear in the list the next time you access this screen.

### Date Range

Indicate the time period for this report. Only records that

### Organization(s)

Indicate which organizations should be included in the r

### Program(s)

Check the box to limit report results by selected program click the icon to select all.

## 10. Next complete the report fields.

**Reports** ClientTrack All Search Q Lori Wood (Training) Help Sign Out

Data Explorer  
Files on Server  
By Name Lists  
HMIS Exports  
HMIS Reports  
Administrative Reports  
Client Reports  
Client List  
Client Demographics  
Client Employment Status  
Client Goals  
Client Goal Action Plans  
Client Barriers  
Duplicated Clients  
Employment Improvement  
Goal Outcome  
Enrollment Reports  
Referral Reports  
Reports  
Service Reports  
Other Reports

Client List Report

For help relating to this form, click the **Help** icon in the top right area of this form. For general help, click the **Help Topics** link in the top right area of this application.

### Saved Report Settings

To use saved report settings, select the desired settings description. To save the settings for a new report, select **Save Settings**, type the description of the settings in the **Save As** field, select the report settings, and run the report. The saved settings will appear in the list the next time you access this screen.

Saved Report Settings: - SELECT -

### Date Range

Indicate the time period for this report. Only records that fall within the date range you select will be included.

Predefined Date Range: Current Month  
Client created between: 10/01/2019 and 10/31/2019

### Organization(s)

Indicate which organizations should be included in the report by selecting each organization separately, or click the  icon to select all. Note: The list only shows organizations you are authorized to view.

Organization(s):  
+ 4 County  
A Hand Up  
ACTION Inc of Delaware County  
Affordable Housing Corporation of Marion  
Aging & Community Services of South Cent  
AIDS Ministries

### Users

This list displays users that belong to the available organizations. Select the users you choose to view records created by them on this report. Leave this section "unselected" if you choose not to restrict the report to any users.

Report Schedule Report Cancel

11. Once the report parameters have been entered, click "Report" located at the bottom right of the screen

Please email the appropriate help desk if additional assistance is needed.

[HMISHelpDesk@ihcda.in.gov](mailto:HMISHelpDesk@ihcda.in.gov) or [DVClientTrack@ihcda.in.gov](mailto:DVClientTrack@ihcda.in.gov)

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