How to Add a Crisis Call as a Service

Using the Services tool to document Crisis Calls will allow your organization to quickly document a call for a client in a critical moment and pull a Service Summary report to review Crisis Call information for any given timeframe.

Follow these steps to document a Crisis Call as a service:

- 1. Login to DV ClientTrack
- 2. Choose the **"Clients"** workspace by clicking on the client workspace icon at the top left of your screen (see picture below).

X	Q Search	Clients / Client Dashboard	GP	↓ ₿
۲		Green Ranger SSN Client ID A III Client ID IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII		
•	Q Find Client	Green Ranger's Dashboard	ŧ	14 ×
B	1 ↓ Intake	or con runger o boombourd	-1	
	COVID-19 Intake	Green Ranger's Information	Ľ	
ਅ	COVID-19 Vaccine Intake	Name: Ranger, Green Birth Date 2/3/1986	Age: 36	
	> 🗀 Client Profile	Gender: Male	/eteran: No	
	> 🗅 Common Client Assessments			
	> 🗅 Other Client Assessments	Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x) Race: Asian or Asian American, White		
	Client Enrollments and Client Services			
	> 🗀 Confidential Case Notes	Green's Enrollments	ľ	
		1 result found.		
		Enrollment Description Case Members Project Start Date I: Housing Move-In Date Project Exit Date I: Enroll Assessment ID Exit Assessment ID Exit Destination	Last Assesse	ed
		✓ Active		
		✓ Emergency Shelter		
		••• My Fake Organization (ES-R8) 1 10/25/2022 113413	10/25/2022	
		Green's Case Manager Assignments	R	
		1 result found.		
		Case Manager Begin Date it Status End Date Enrollment Enrollment	ed	
		Grant Peters 10/25/2022 Active My Fake Organization (ES-R8) Op		

3. Search for the client in the system by clicking on **"Find Client"** (see picture below). If the client is already in the system, the client's information will appear in the search results list (see picture below). Click on the client's name to go to the client record.

)r	Q Search	Clients / ClientTrack Form	2 🗎
⊛ ₽	Client Dashboard Q Find Client	Green Ranger SSN Client ID Q Client ID 2/3/1986 123-45-6789 147185 Q C Find Client C C C	< 0
∎ ☆	 11 Intake 12 COVID-19 Intake 	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: red	
	Client Profile Common Client Assessments Other Client Assessments Client Enrollments and Client Services	Last Name: Middle Name Social Security Number: Alternate Reference ID: Birth Date: MM/DD/YYYY	
	Confidential Case Notes	Client ID: Client Type: Client v No records found.	ch
		First Name Last Name Middle Name SSN Alternate Reference ID Birth Date Otient ID 1. Client Type	

4. If the client is NOT in the system, you will need to create an intake by clicking on "Intake" (see picture below). You will notice that without entering required information in the workflow, you will not be able to "Add Crisis Call Client" (see picture below).

X	Q Search	Clients	GP A E
⊛ ≅	Client Dashboard G Find Client	Intake (2298) # Green Ranger 2/3/1986 SSN Client ID ↓ ∅ 11 ③ Add or Edit 0 Add or Edit 123-45-6789 147185 ↓ ∅ 11	
	1⊐, Intake		
	12 COVID-19 Intake	O Family Members	
щ	SCOVID-19 Vaccine Intake	O Program Enrollment	
	> 🗅 Client Profile	II Pause X Cancel	
	> 🗀 Common Client Assessments		
	> 🗅 Other Client Assessments		
	 Client Enrollments and Client Services 		
	> 🗅 Confidential Case Notes		
		Add or Edit Do you want to add a new client or use the selected client?	
		Select another client	
	If you don	, It have come basic client information you should chaose "Data Net Collected" and	
	n you don	i chave some basic client mormation you should choose. Data Not Collected and	

If you don't have some basic client information you should choose "Data Not Collected" and plan to update the information as you obtain it. Use the **"Edit Client"** link in the **"Client Profile"** section to the left of the client record to update any basic client information.

X	Q Search	Clients / Client Dashboard				
	Client Dashboard Client Find Client La Intake	Red Ranger SSN C 1/1/1986 111–11–1111 1 Red Ranger's Dashboard 1	Slient ID A 🗎 ∷ 147187			
☆	 COVID-19 Intake 	Red Ranger's Information				4/4/400/
	Client Profile Add Crisis Call Client Edit Client Crimes		Name: Kanger, Ked Gender: Male Ethnicity: Non-Hispan	ic/Non-Latin(a)(o)(x)	Birth Date: Race:	1/1/1986 Black, African Americ:
	 Protection Orders Address History Alias History 	Red's Enrollments				
	Case Managers Case Notes Case Notes Client Files COVID-19 Screening	Enrollment Description Case Mer	mbers Project Start Date 1%	Housing Move-In Date	No records found. Project Exit Date 1	Enroll Assessment ID
	 COVID-19 Vaccines Family Members Interested Others 	Red's Case Manager Assignme	ents			
	Living Situation	Core Manager	Bosin Data 18		No records found.	Enroll
0	Goals Photo	Case Manager	Begin Date 1:	Status	End Date	Enrollment

5. For Anonymous clients, please search for the client we set up for your organization called Anonymous (first name) "Your Organization name" (last name) (see picture below).

)ř	Q Search	Clients / ClientTrack Form	GP 🕂 🛍
*	Client Dashboard G Find Client	Red Ranger SSN Client ID ← Client ID 1///1986 111-1111 147187	< 0
2 ☆	COVID-19 Intake	Use the section criteria below to find your client. To narrow the Airch, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.	
	✓ Client Profile	Last Name: myfakaorg	
	 Add Crisis Call Client Edit Client 	Social Security Number:	
	Crimes Protection Orders	Alternate Reference ID: Birth Date: MM//DD/YYYY 🛅	
	Address History Alias History Case Managers	Client ID: Client Type: Client V	
	Case Notes		Q Search
	COVID-19 Screening	No records found. First Name Last Name Middle Name SSN Alternate Reference ID Birth Date Client ID 1. Client	Туре
	 Family Members Interested Others 		
	 Living Situation Notifications 		

6. Once you select your client, click on **"Client Enrollments and Client Services"**, and then click on **"Services"** on the drop-down menu as shown in the picture below.

)	Search	Clients / Client Dashboard						•	P) E
	Client Dashboard Q Find Client 1 Intake	Red Ranger SSN Client I 1/1/1986 111-11-1111 1471 Red Ranger's Dashboard	₽ 87 \$ @ \$3						84	*
☆	1 COVID-19 Intake	Red Ranger's Information						2	5 -	•
	Client Profile Common Client Assessments Other Client Assessments		Name: Ranger, Red Gender: Male Ethnicity: Non-Hispanic/Non	n-Latin(a)(o)(x)	Birth Date: Race:	1/1/1986 Black, African American, or African		Age: Veteran:	36 No	
	Client Enrollments and Client Services Enrollments Ouck Services	Red's Enrollments						G	s -	
	Referrals Services Confidential Case Notes	Enrollment Description Case Members	Project Start Date 🗄 Hous	N sing Move-In Date Projec	o records found. t Exit Date i t Er	roll Assessment ID Exit Assessm	ent ID Exit Destination	Last Asses	sed	
		Red's Case Manager Assignments						G	s -	
		Case Manager	Begin Date 1	N Status	o records found. End Date	Enrollment	All Associated Enrollments			
		Red's Services		N	o records found			2	f -	•

7. Click on the "+ Add New" button to create a new service for the Crisis Call.

)ř	Q, Search	Clients / ClientTrack Form	GP 4 🗎
*	 Client Dashboard Q Find Client 	Red Ranger SSN Client ID ↓ ↓ ● □ 1/1/1986 111-11-1111 147187 ↓ ● □ Client Services	< 0
8 ☆	COVID-19 Intake COVID-19 Intake	The client's service history displays below. To record a service, click Add New. To record multiple services, click Quick Services. To edit or view an existing service, click Edit next to the reco	I Quick Services
	Client Profile Common Client Assessments Other Client Assessments	No records tound. Assessment ID Date I: Service Units S Total Organization	
	Client Errollments and Client Services Errollments Quick Services Referrals Services Services		
	> 🗁 Confidential Case Notes		
() avascript	noid(0);		Cancel

8. Select the **"Grant"** first by choosing **"Crisis Call"** in the drop-down list. The requirement for selecting an **"Enrollment"** will go away once you've selected **"Crisis Call"** for **"Grant."**

							-	
X	Q Search	Clients / ClientTrack Form / ClientTrack Form					GP	4 🖻
•	Client Dashboard Client Find Client D Intake	Red Ranger SSN Client ID Ф 1/1/1986 111-11-1111 147187 Ф Service	₿ 0					<
	13 COVID-19 Intake	Enter the information about the service provided to the	client below.					
☆	COVID-19 Vaccine Intake		Family Income:	+				
	> 🗀 Client Profile		No Recent Incom	e				
	> 🗀 Common Client Assessments		Family Members	1				
	> 🗅 Other Client Assessments		Poverty Level	\$1,132.50				
	 Client Enrollments and Client Services 	Enrollment	SELECT 🗸					
	C Enrollments	ant*	Crisis Call	~)				
	Quick Services	Service.*	SELECT			Location: SELECT 🗸		
	+ Referrals	Date:*	10/150					
	Services	Units:*	1.00					
	> 🗀 Confidential Case Notes	Unit Value:*	\$1.00					
		Total:	\$1.00					
		User Performing the Service:	Grant Peters	Q				
		Comments:						
					R.			
0						0	Save	Cancel

9. Select the **"Service**" by choosing **"Crisis Call"** in the drop-down list. Additional fields will appear after making this selection (see picture below). Change the date and time of the call if needed and complete the information as required.

X	Q, Search	Clients / ClientTrack Form / ClientTrack Form		GP 4 🛱
*	Client Dashboard Q Find Client	Red Ranger SSN Client ID 4 1/1/1986 111-11-1111 147187 4 Service Client ID 4		< 🖶
8	13 Intake		Puverty Level 31,132.30	
	12 COVID-19 Intake			
☆	COVID-19 Vaccine Intake	Enrollment:	SELECT V	
		Grant:*	Crisis Call V	
	> 🗀 Client Profile	Service :*	Crisis Call 🗸 🗘 Location: SELECT 🗸	
	> 🗀 Common Client Assessments	Related Crime/Victimization:	SELECT 🗸 🛈	
	> 🗅 Other Client Assessments	Date:*	10/26/2022	
	✓ ➡ Client Enrollments and Client Services	Units:*	1.00	
	Enrollments	Unit Value:*	\$0.00	
	 Quick Services 	Total:	\$0.00	
	+ Referrals	User Performing be Service:	Grant Peters Q	
	C Services	Company		
	> 🗅 Confidential Case Notes	Comme		
		Crisis Call Information		
			Call Date/Time:* 10/26/2022	
			Call Type: O Crime/Victimization	
			○ Information/Other	
			O Hangup/Prank	
			911 Needart SELECT ×	
			Description:	
0				Save Cancel

10. For "Victimization Type" you will be able to choose "homeless", "stalking", "DV", or "sexual assault". For "Shelter Provided", if you select "No" another box will open, and you can choose one of the denial reasons shown in the picture below. Complete the required fields. When finished, click "Save."

)ř	Q Search	Clients / ClientTrack Form / DilentTrack Form	GP 4 🖻
*	 Client Dashboard Find Client 	Red Ranger SSN Client ID A B Client ID 1/1/1986 111-11-1111 147187 A B Client ID Service 111-11-1111 147187 A B Client ID	< 8
■	La Intake COVID-19 Intake COVID-19 Vaccine Intake COVID-19 Vaccine Intake Client Profile Common Client Assessments Other Client Assessments	Unit Value* \$0.00 Total: \$0.00 User Performing the Service: Grant Peters Q. Comments:	
	 Client Enrollments and Client Services Enrollments Quick Services Referrats Services Services 	Crisis Call Information Call Date/Time:* 10/26/2022 AM Call Type:* Crime/Victimization Information/Other Hangup/Prank 911 Needed:* No Description:	_
Ø		Are you safe?* Yes Are you injured?* No Is abuser present?* No Vicitimization type:* Stalking Ucitimization type:* Stalking Safet Summing Provided?* Yes Uniter Needed?* Client Refused	Save Cancel

Service Summary Reports

Your organization can run a **"Service Summary"** report to review Crisis Call information for your clients. This can be found under the **"Reports"** workspace. To access the **"Reports"** workspace, click on the icon with arrows at the top of your screen and then select the **"Reports"** option as shown in the picture below.

Follow these steps to run a Service Summary Report for Crisis Calls:

1. Click on the **"Reports"** workspace, **"Service Reports"** folder, and then click on **"Service Summary"** in the new drop- down menu.



2. Set up your report parameters: Define your "Date Range" with the date fields provided

X	Q Search	C Reports / ClientTrack Form
*	 Data Explorer 	I D Service Summary Report
 ■ ☆ 	By Name List D HMIS Exports HMIS Reports	For help relating to this report, 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.
	Administrative Reports Client Reports	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.
	C Enrollment Reports Referral Reports	Saved Report Settings: SELECT V
		Date Range Indicate the time period for this report. Only confids that fall within the date range you select will be included. Predefined Date Range: Current Month Service Date Between:* 10/01/2022 @ and 10/31/2022 @ Organization(s)
	 Service by Provider Turn Away Reason 	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.

3. Scroll down and filter by "Grant" and "Services", check the check boxes. A drop-down list will show, select "Crisis Call" for "Grant" and "Service". You should see a blue check mark appear beside it when it is selected. Click "Report" to run the Service Summary report for Crisis Calls (See picture below).

)r o	Search	Reports / ClientTrack Form GP	₽ 🛱
* 6	Data Explorer	D	
₽ #	Files on Server	Service Summary Report	< 0
		Program(s)	
→ C	By Name List	Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by select	ing
	HMIS Exports	each program separatery, or click the 🖉 icon to serect an.	
	HMIS Reports	Program(s): Filter by Program(s)	
> C	Administrative Reports	Ŭ	
	Client Reports	Grantfol	
	Enrollment Reports	Check the box to limit report results by selected grants. When checked, the list because grants that below, be organizations you selected above. Indicate which grants should be included in the report by selecting each	grant
	Search Reports / Clentificat Form Data Explorer Files on Server Files on Server Service Summary Rep By Name List Files on Server By Name List Files on Server HMIS Exports Check the box to limit report each program separately, or separately, or click the \$ ico Client Reports Grant(s) Client Reports Grant(s) Service Reports Check the box to limit report separately, or click the \$ ico Service Summary Check the box to limit report separately, or click the \$ ico Service By Provider Services Service By Provider Select the specific services file Framily Size & Income User(s) Household Composition User(s) VOCA 3.0 Check the box to limit report separately, or click the \$ ico	separately, or click the 🗇 icon to select all.	
× C	Service Reports	Grant(s): 📝 Filter by Grant(s)	
	Service Summary	🗸 Crisis Call 🛛 🛷	
	🖹 Zip Code & County	My Fake Organization ES	
	Clients Served	Ny Fako Organization RRH	
	Service Demographic Totals		
	Family Demographics Totals	Sandas	
	Service By Provider	Select the specific services for the report, or leave the field blank to run the report for all services. NOTE: The services in this list are filtered according to the organizations and funding sources selected above.	
	Turn Away Reason		
	Frequently Served Clients	Septem: Vervices	
	Reason for Service	✓ Crisis Call (526) ✓ ✓ ✓ ✓	
	Family Size & Income		
	Household Composition	User(s)	
	NOCA 3.0	Check the box to limit report results by selected users. When checked, the list displays users that belong to the organizations you selected above. Indicate which users should be included in the report by selecting each use	3r
> ⊏	Other Reports	separately, or click the 🕏 icon to select all.	
		User(s): Filter by User(s)	
0		B Report B Schedule Report	Cancel

4. You can click on the link in the report window for "Crisis Calls" to review client level information. You can also export the report to a pdf file or Excel spreadsheet by clicking on the little blue disc at the top of the report window and selecting the desired file type.

