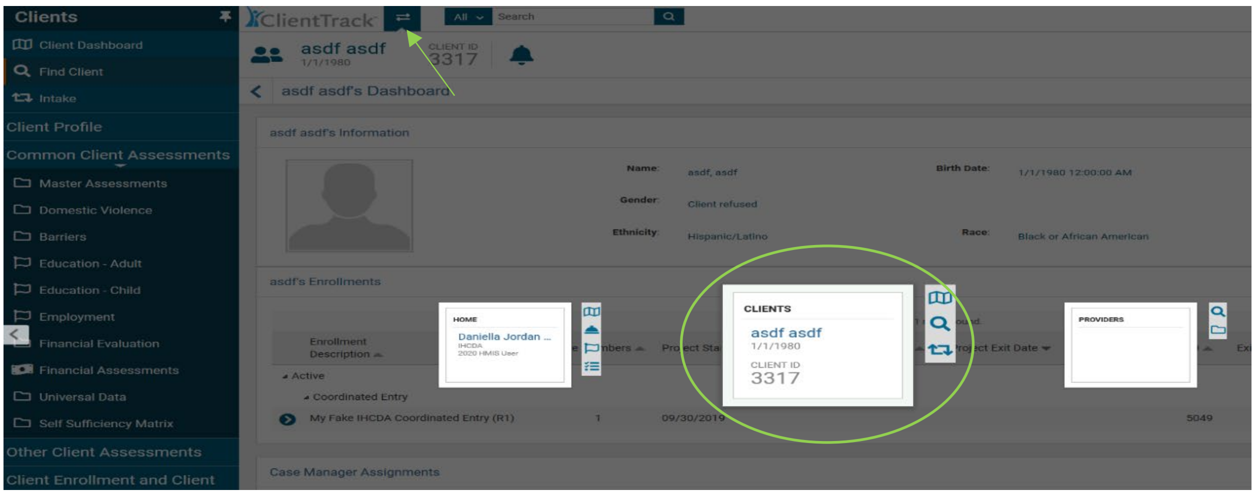
How to Add a Crisis Call as a Service

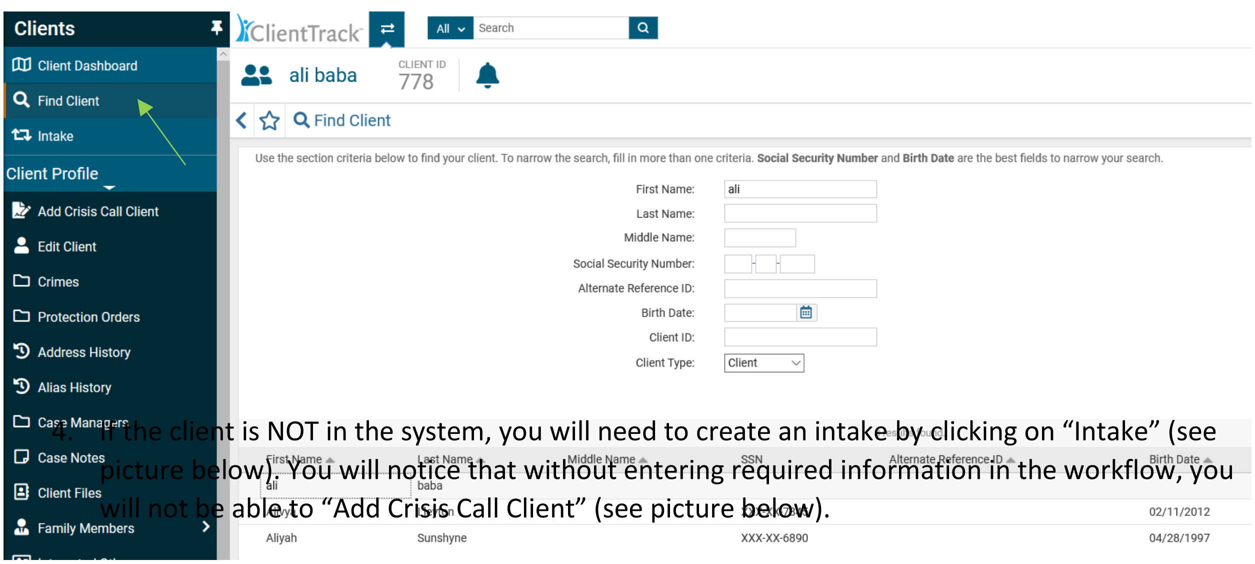
Using the Services tool to document Crisis Calls will allow your organization to quickly document a call for a client in a critical moment and pull a Service Summary report to review Crisis Call information for any given timeframe.

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 two arrows icon at the top left of your screen (see picture below).



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 name to go to the client record.



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).

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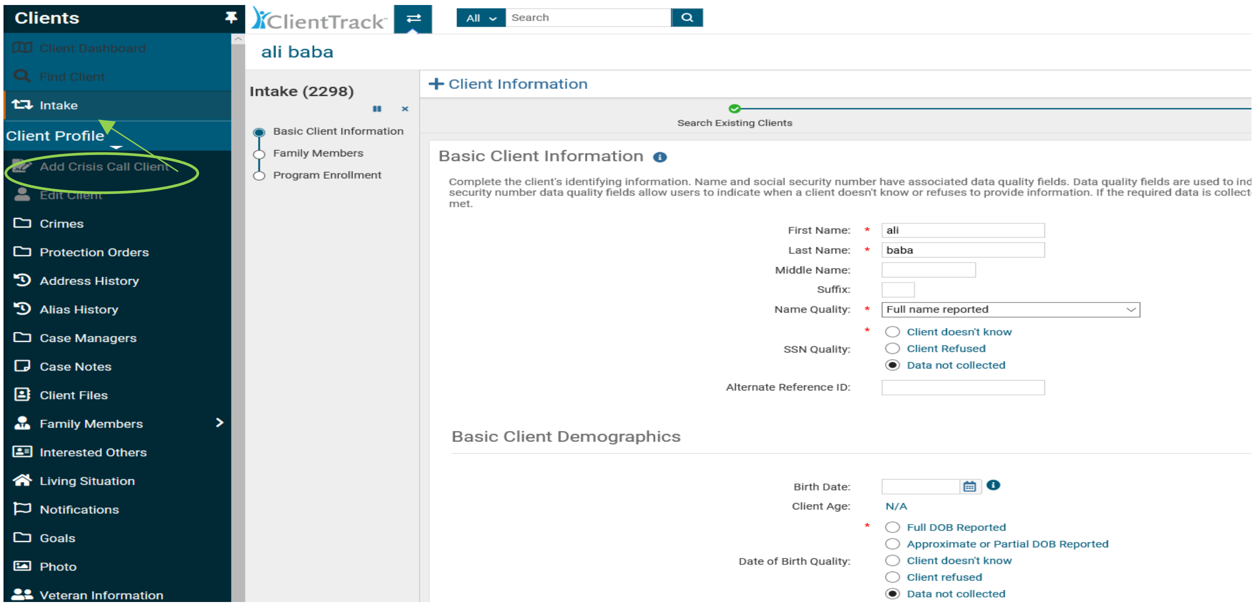
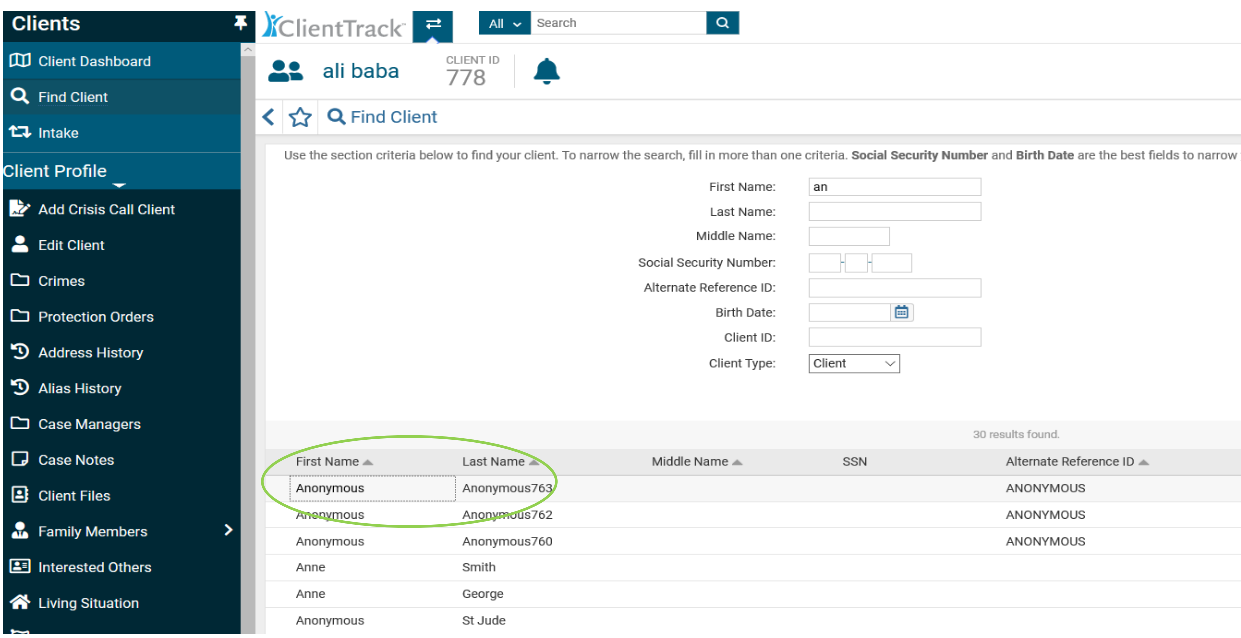
If you don't have some basic client information you should choose "Data Not Collected" and plan to update the information as you obtain it. Use the "Edit Client" link in the list of Case Management tools to the left of the client record to update any basic client information.



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).



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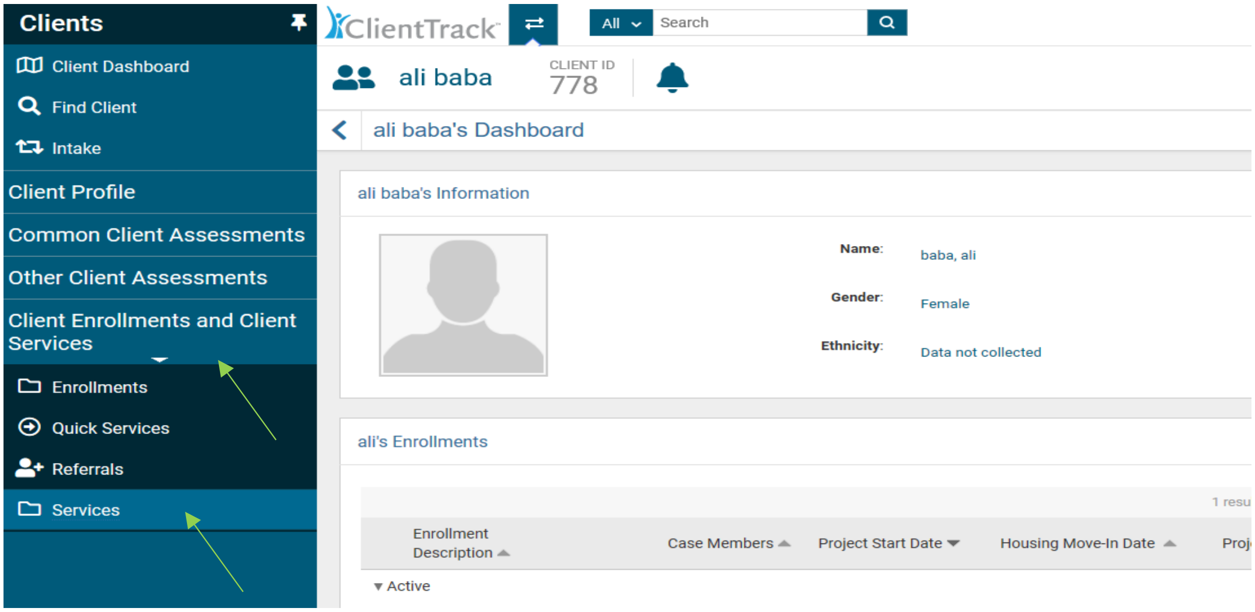
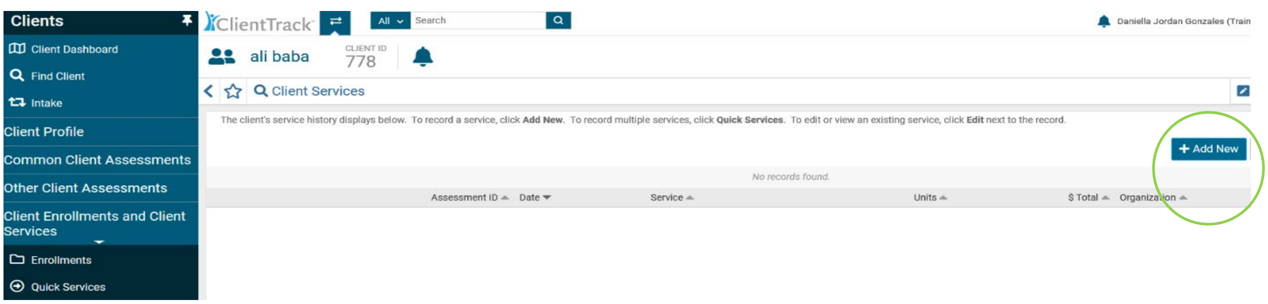
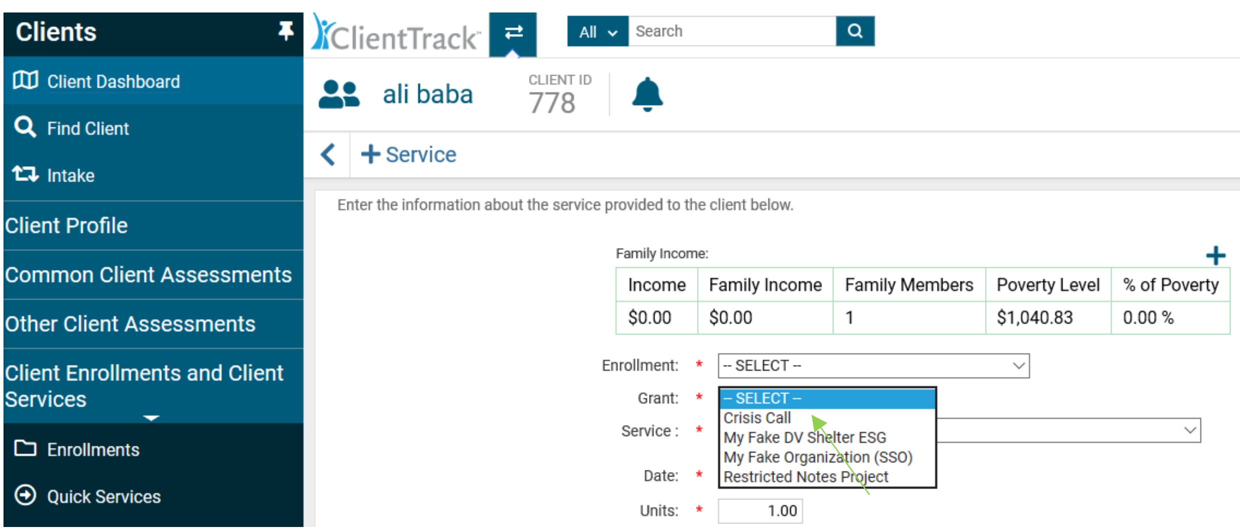
6. Once you select your client, click on “Client Enrollments and Client Services” and then click on “Services” on the drop-down menu as shown in the picture below.



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



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.”



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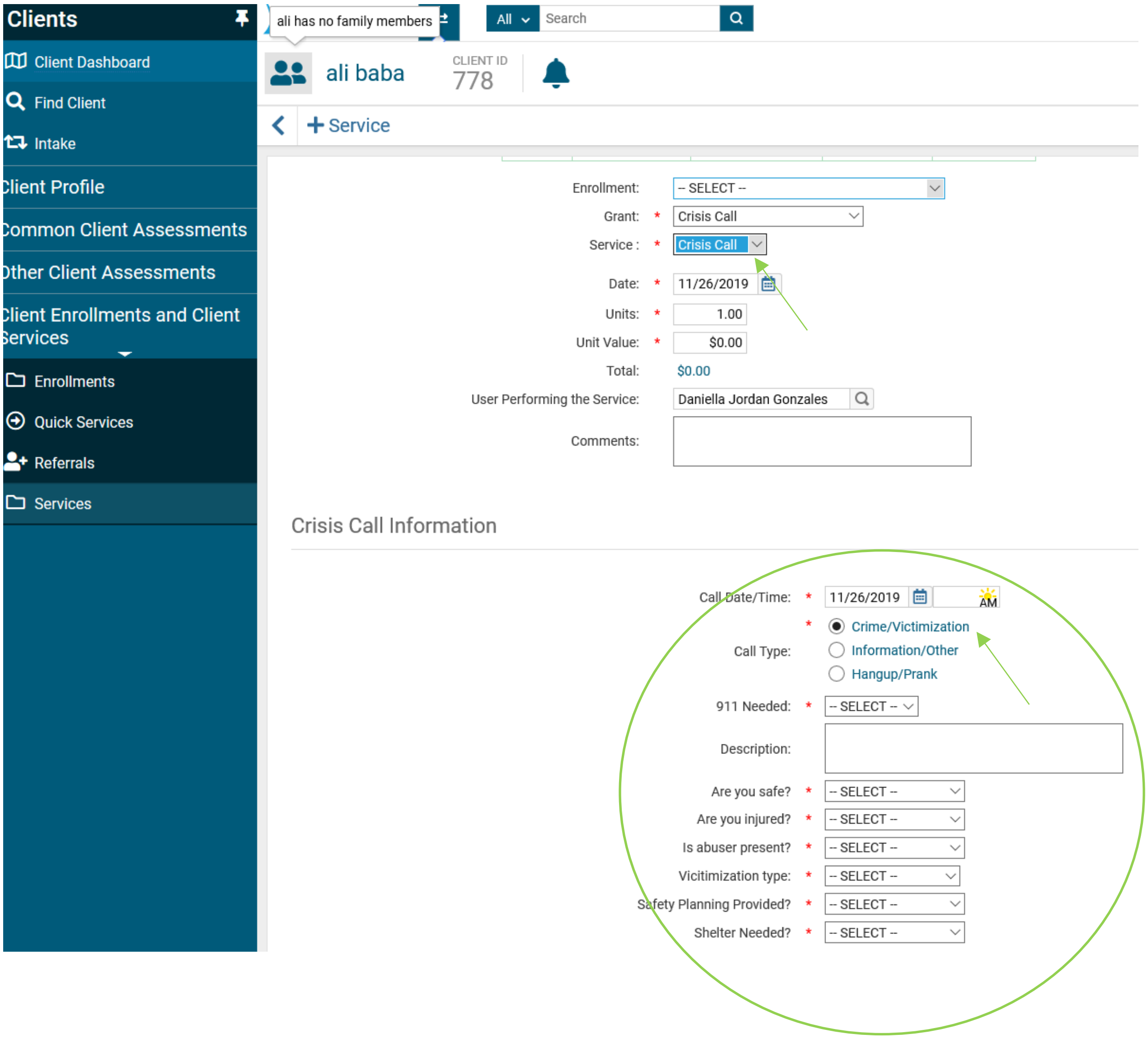
9. Select the “Service” by choosing “Crisis Call” in the drop-down list. Additional fields will appear after making this selection (see picture below). Change the date and time of the call if needed and complete the information as required.



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.”

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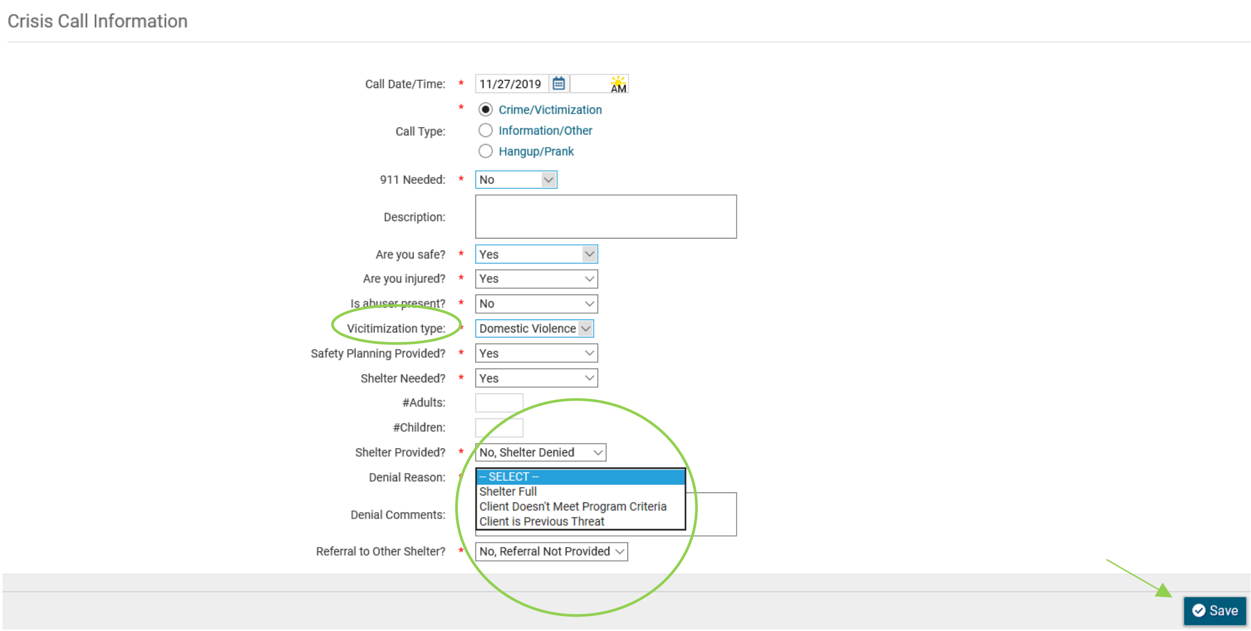
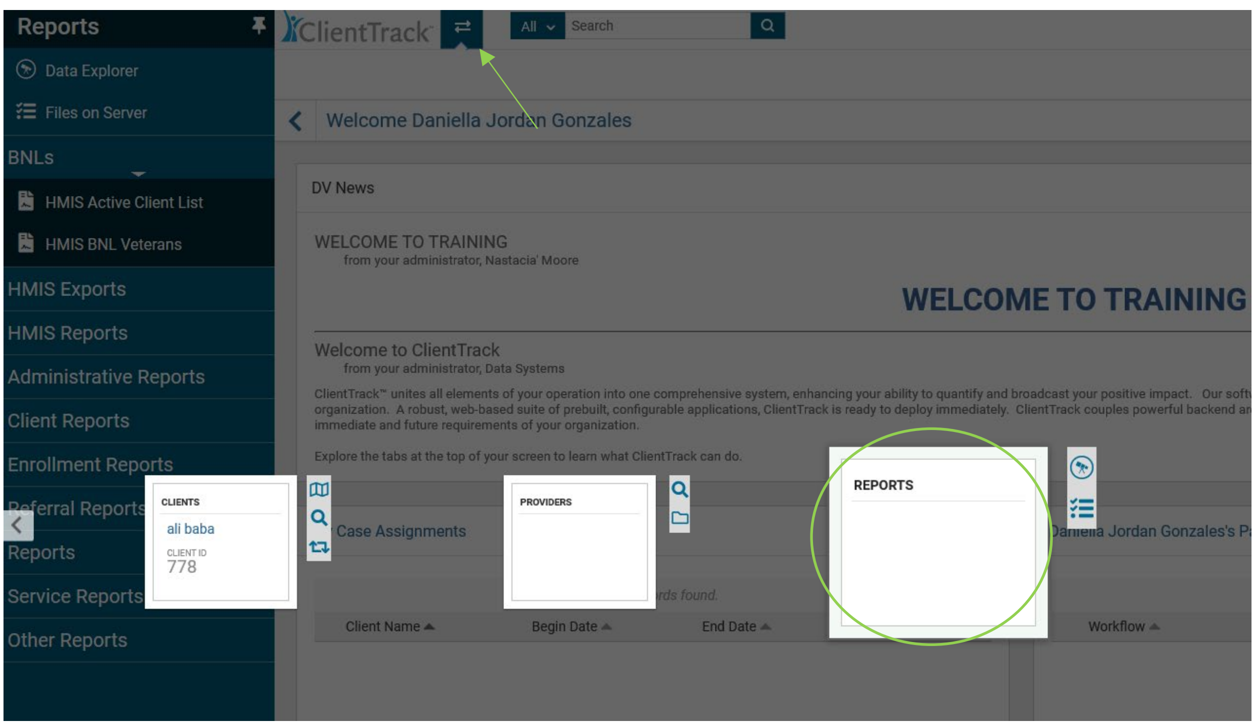


Service Summary Reports

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.



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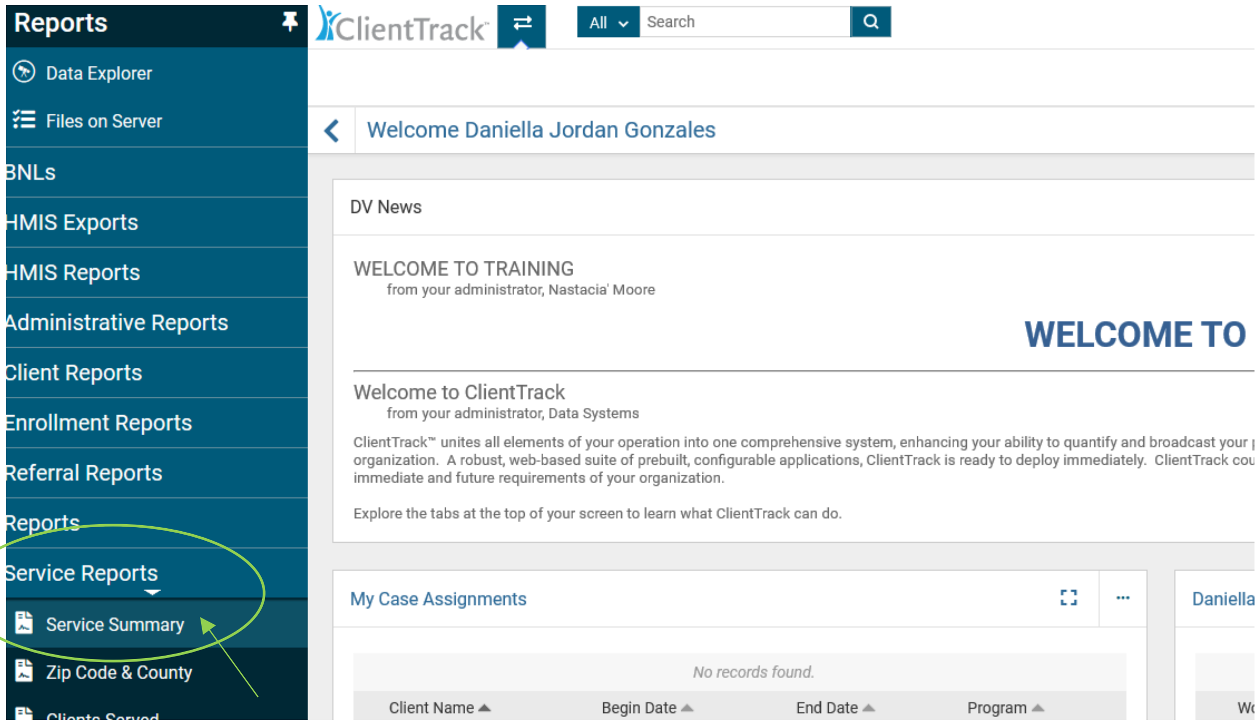
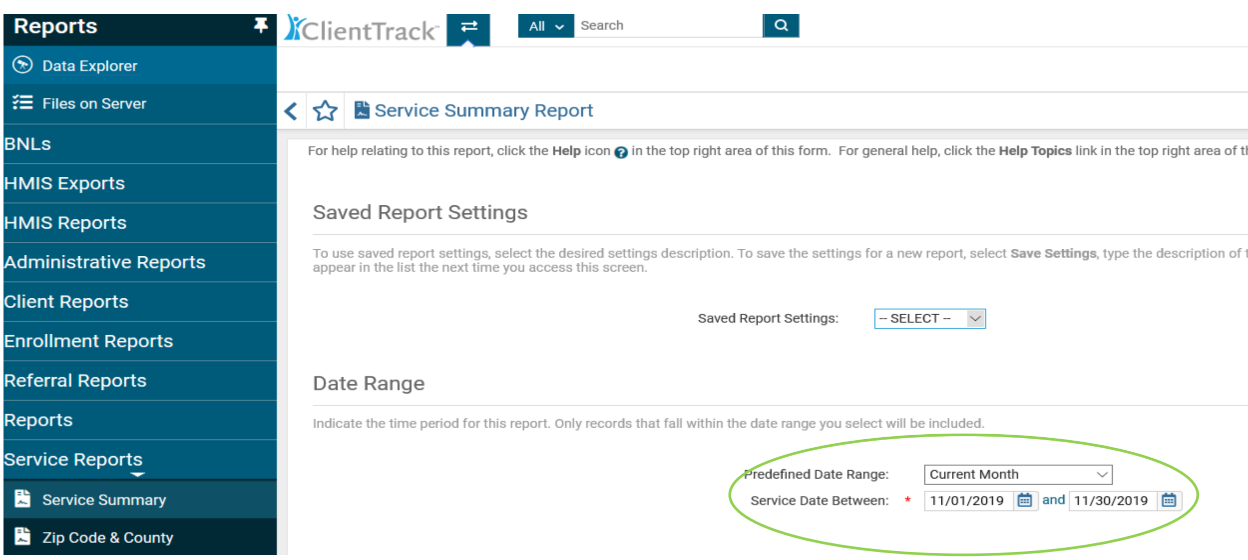
Follow these steps to run a Service Summary Report for Crisis Calls:

1. Click on the "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



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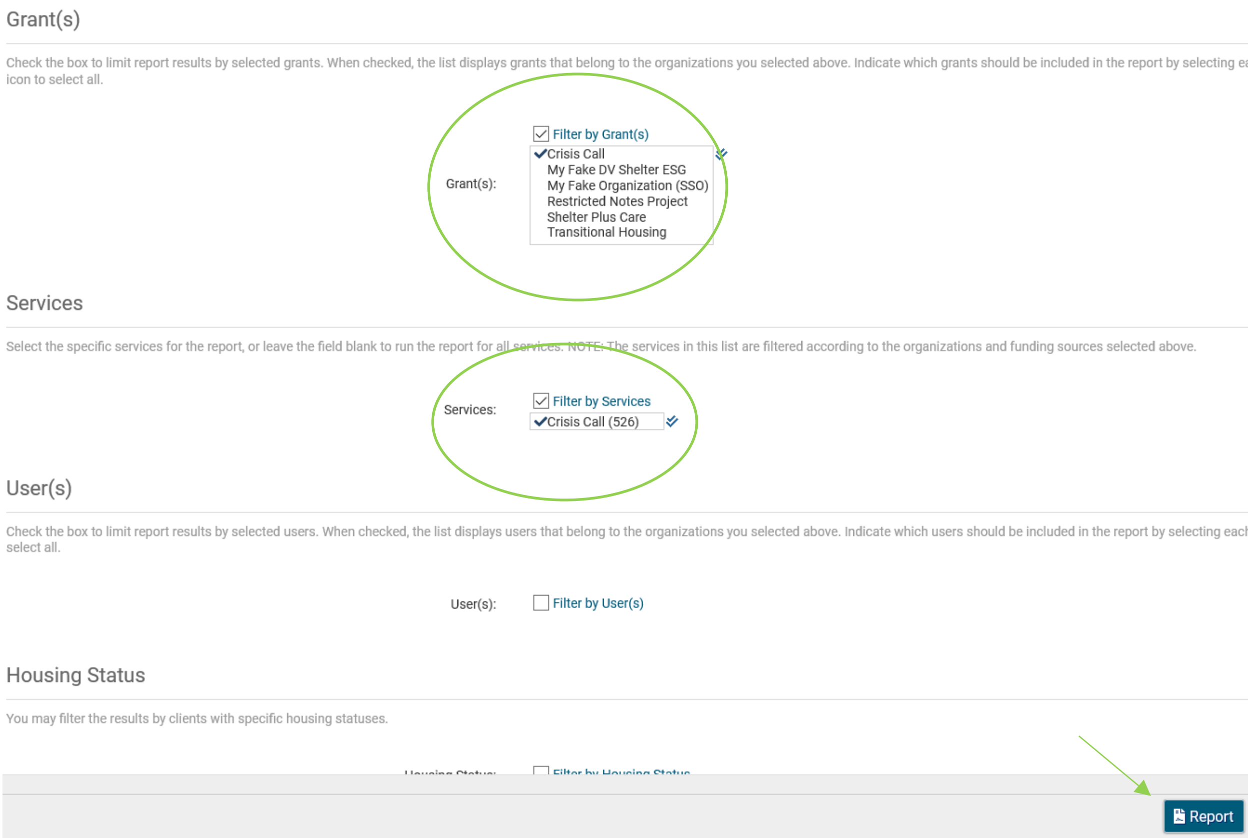
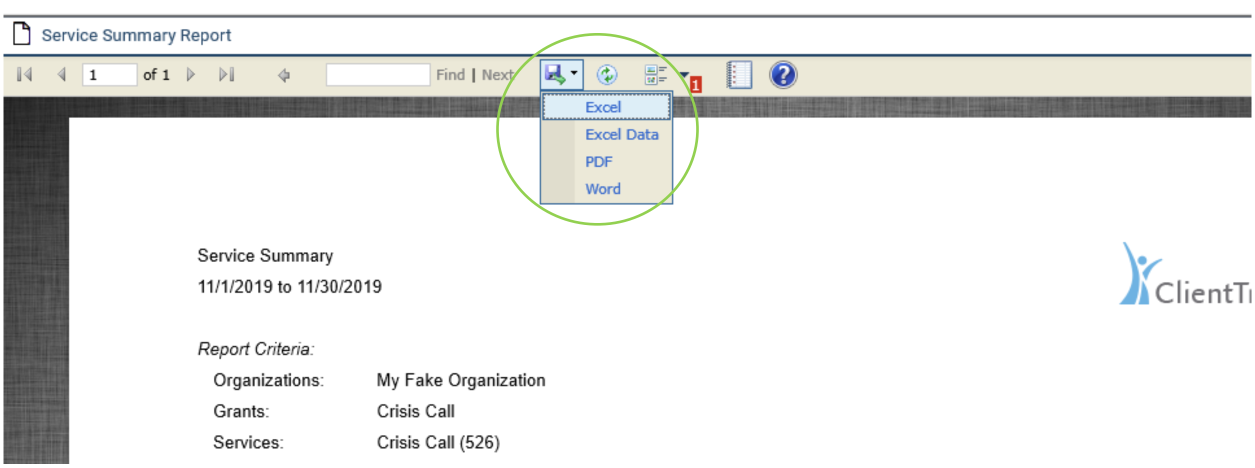
- Scroll down and filter by “Grant” and “Services”, check the check boxes. A drop-down list will show, select “Crisis Call” for “Grant” and “Service”. You should see a blue check mark appear beside it when it is selected. Click “Report” to run the Service Summary report for Crisis Calls (See picture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



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.



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