

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

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.

The screenshot shows the HMIS/DV CLIENTTRACK interface. On the left-hand side, there is a vertical menu with several options. The 'COVID-19 Intake' option is highlighted with a red arrow. The main area of the screen displays the 'Client Dashboard' for Michelangelo Turtle, including his Social Security Number (123-45-6789), Client ID (1048331), and various assessment details. The 'COVID-19 Intake' option is also visible in the top navigation bar.

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

The screenshot shows the HMIS/DV CLIENTTRACK interface. On the left-hand side, the 'COVID-19 Intake' option is highlighted with a red arrow. The main area of the screen displays the 'COVID-19 Screening' form for Raphael Turtle, including his Social Security Number (123-45-6789), Client ID (1048332), and various assessment details. The 'Add or Edit' button is highlighted with a red arrow. Below the 'Add or Edit' button, there is a message: 'Do you want to add a new client or use the selected client?'. To the right of this message, there are three buttons: 'Add a new client', 'Use the current client', and 'Select another client'. The 'Add a new client' button is highlighted with a red arrow.

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

The screenshot shows the 'COVID-19 Screening' interface. On the left is a sidebar with 'Basic Client Information' selected. The main area is titled 'Client Information' and contains a 'Search Existing Clients' section with instructions. Below the instructions are input fields for 'First Name', 'Last Name', 'Social Security Number', and 'Birth Date'. A red rectangle highlights these fields. At the bottom right, a 'Next' button is also highlighted with a red rectangle. The top of the form shows the client's name 'Raphael Turtle' and tabs for 'Social Security Number' and 'Client ID'.

COVID-19 Screening

Basic Client Information

Search Existing Clients

Basic Client Information

COVID-19 Screening

Pause Cancel

Client Information

Search Existing Clients

The first step in adding a new client is to search existing client records for possible matches to avoid duplicate entry. Enter partial identifying information on the client, and then click Next to search from existing client records.

- If the system finds no potential matches, you will be taken directly to Step 2.
- If the system finds potential matches, the search results will display below. If an accurate match appears, select and open that existing client record by clicking on that row.
- If there are no accurate matches, click Next again to continue to Step 2 in adding a new client record.

First Name:

Last Name:

Social Security Number:

Birth Date: MM/DD/YYYY

Next

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

The screenshot shows the 'COVID-19 Vaccine Assessment' interface. On the left is a sidebar with 'COVID-19 Vaccine Intake' selected. The main area is titled 'Client Information' and contains a 'Basic Client Information' section with instructions. Below the instructions are input fields for 'First Name', 'Last Name', 'Middle Name', 'Suffix', 'Name Quality', 'Social Security Number', and 'SSN Quality'. A red rectangle highlights these fields. The top of the form shows the client's name 'Raphael Turtle' and tabs for 'Social Security Number' and 'Client ID'.

COVID-19 Vaccine Assessment

Basic Client Information

Search Existing Clients

Basic Client Information

COVID-19 Vaccine

Pause Cancel

Client Information

Basic Client Information

Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.

First Name: Raphael

Last Name: Turtle

Middle Name:

Suffix:

Name Quality: Full name reported

Social Security Number:

SSN Quality: Client doesn't know

Client Refused

Data not collected

5. Complete the **“Basic Client Demographics”** fields. Review the **“Family Information”** fields then click **“Finish”**

COVID-19 Screening

leo tur Social Security Number Client ID

Basic Client Information

Search Existing Clients Basic Client Information

COVID-19 Screening

Pause Cancel

Client Information

Basic Client Information ⓘ

Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.

First Name: * leo

Last Name: * tur

Middle Name:

Suffix:

Name Quality: * Full name reported

Social Security Number:

SSN Quality: * ☒ Client doesn't know
☐ Client Refused
☐ Data not collected

Basic Client Demographics

Birth Date: MM/DD/YYYY ⓘ

Client Age: N/A

Date of Birth Quality: * ☐ Full DOB Reported
☐ Approximate or Partial DOB Reported
☒ Client doesn't know
☐ Client refused
☐ Data not collected

Ethnicity: * -- SELECT -- ⓘ

Previous Finish

Search

Client Dashboard Find Client

Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Profile

Common Client Assessments

Other Assessments

COVID-19 Vaccines

COVID-19 Screening

Health

HOPWA Assessments

Housing Assessment

Disposition at Exit

HUD-VASH Voucher Tracking

HUD-VASH Exit Information

RHSAP Collection

Non-Congregate Shelter

SOAR Connection

SSVF Homeless Prevention

Medical Assistance

T-Cell/Viral Load

COVID-19 Vaccine Assessment

Raphael Turtle Social Security Number Client ID

Client Information

Veteran Status: * Client Doesn't Know

Contact Information

Address:

Address 2:

City, State, Zip Code: City County County State Zip Code

Email:

Home Phone:

Cell Phone:

Work Phone:

Msg Phone:

Family Information

Use this section to collect data about a client's family. The Family search field allows you to search for and select an existing family account. This is appropriate when adding a family member to an existing family.

Family:

Relationship to Head of Household: * Self

6. **IMPORTANT NOTE: Please READ the “Before You Start” warning below**

COVID-19 Screening

Raphael Turtle1/1/1990Social Security Number--Client ID1048332

COVID-19 Screening

COVID-19 Screening Tool

Before you start... Stop and call 911 if client presents with any of these symptoms:

- Constant chest pain or pressure
- Extreme difficulty breathing
- Severe, constant dizziness or lightheadedness
- Slurred speech
- Difficulty waking up
- Blueish Lips or Face

First, become familiar with symptoms of COVID-19 and how they differ from the Flu and allergies.

COVID-19	FLU	ALLERGIES
Fever Cough Shortness of Breath	Fever Cough Sore Throat Headaches Body, Muscle Aches Runny, Stuffy Nose Fatigue	Sneezing, Coughing Runny Nose, Scratchy Throat Itchy, Red Watery Eyes

7. Next, click on the “Magnifying Glass” displayed under “Assessment – No Assessment Selected”.

COVID-19 Screening

Raphael Turtle1/1/1990Social Security Number--Client ID1048332

COVID-19 Screening

COVID-19	FLU	ALLERGIES
Fever Cough Shortness of Breath	Fever Cough Sore Throat Headaches Body, Muscle Aches Runny, Stuffy Nose Fatigue	Sneezing, Coughing Runny Nose, Scratchy Throat Itchy, Red Watery Eyes

Assessment:
No Assessment Selected

Age: 32

Social Security Number:

Gender:

- Female
- Male
- A gender other than singularly female or male (e.g., non-binary, genderfluid, agender, culturally specific gender)
- Transgender
- Questioning

Home Phone:

Email:

8. Click **"Add New"**

Search ✕

Find Assessment <

Use the criteria below to find the Assessment containing accurate data for the client. Only assessments created by your organization will be displayed below.

Assessment Date:

MM/DD/YYYY

Type:

-- SELECT --

Program:

User:

Comments:

+ Add New

Search

Cancel

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

Master Assessment



A Master Assessment record ties together a number of separate, detailed assessments/data elements to a single process. For example, if you are creating an **Entry** Type Master Assessment, the data elements you record while this assessment is active will be tied to the entry.

Assessment Date: *

10/24/2022



Assessment Type: *

Entry



Program: *

My Fake Organization ES (ES-R8)



Assessor: *

Grant Peters



Comments

If you have any other comments or notes regarding this assessment, please enter them below.

Comments:



Save

Cancel

12. Complete the **“Screening Information”** fields. **NOTE: Additional fields may populate based upon the information disclosed by the client and entered in the system.**
13. Select the client’s **“Symptoms”** from the drop-down box
14. Select the client’s **“Existing Conditions”** from the drop-down box
15. **“Known exposure to COVID-19”** if client answers **“Yes”**, please click the check box
16. **“Previously Tested”** if client answers **“Yes”**, please click the check box

Q Search

Client Dashboard

Find Client

Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Profile

Common Client Assessments

Other Assessments

COVID-19 Vaccines

COVID-19 Screening

Health

HOPWA Assessments

Housing Assessment Disposition at Exit

HUD-VASH Voucher Tracking

HUD-VASH Exit Information

RHSAP Collection

Non-Congregate Shelter

SOAR Connection

COVID-19 Screening

Raphael Turtle 1/1/1990 Social Security Number -- Client ID 1048332

Basic Client Information

COVID-19 Screening

Pause Cancel

Email:

Screening Information

Screening Date: 10/24/2022

Current Temperature: 79.000

Temperature Scale: Fahrenheit

Symptoms: Fever Cough Shortness of Breath Tiredness Aches and Pains

Existing Conditions: Chronic Lung Disease Asthma Serious Heart Condition Immunocompromised (including cancer treatment) Severe Obesity (BMI >40%)

Known Exposure to COVID-19: ☐

Previously Tested: ☐

17. Complete “Prior Test Date”

18. Select the “Prior Test Result” from the drop-down box

19. Select the “Current Test Status” from the drop-down box, then click “Save”

COVID-19 Screening

Raphael Turtle 1/1/1990 Social Security Number -- Client ID 1048332

Basic Client Information

COVID-19 Screening

Pause Cancel

Previously Tested: ☒

Prior Test

Prior Test Date: 01/02/2022

Prior Test Result: Positive

Client should be provided a mask and be isolated from other clients.

Current Test

Current Test Status: Sent

Should the client screen positive for these symptoms, it does not mean that they have the COVID-19 virus. They could have another type of flu, a common cold, or allergies. They should be provided with a mask and be isolated from other clients until a cause of symptoms is determined.

If client exhibits severe symptoms and they have other underlying conditions, call 911.

Result of Screening: Asymptomatic Low Risk

Telehealth

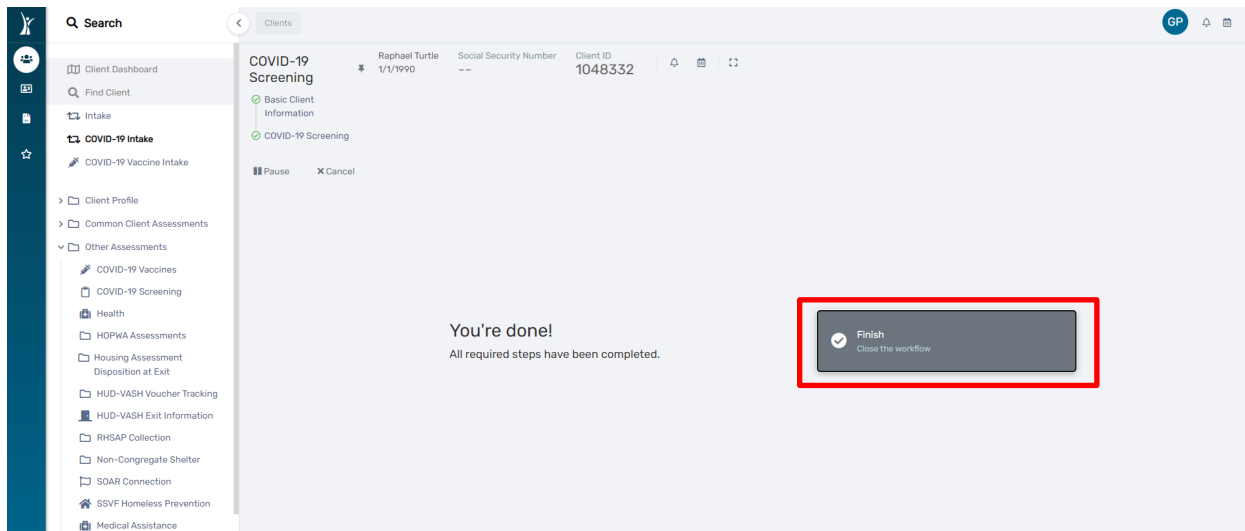
Contacting Health Care information

Contact Health Care Provider: -- SELECT --

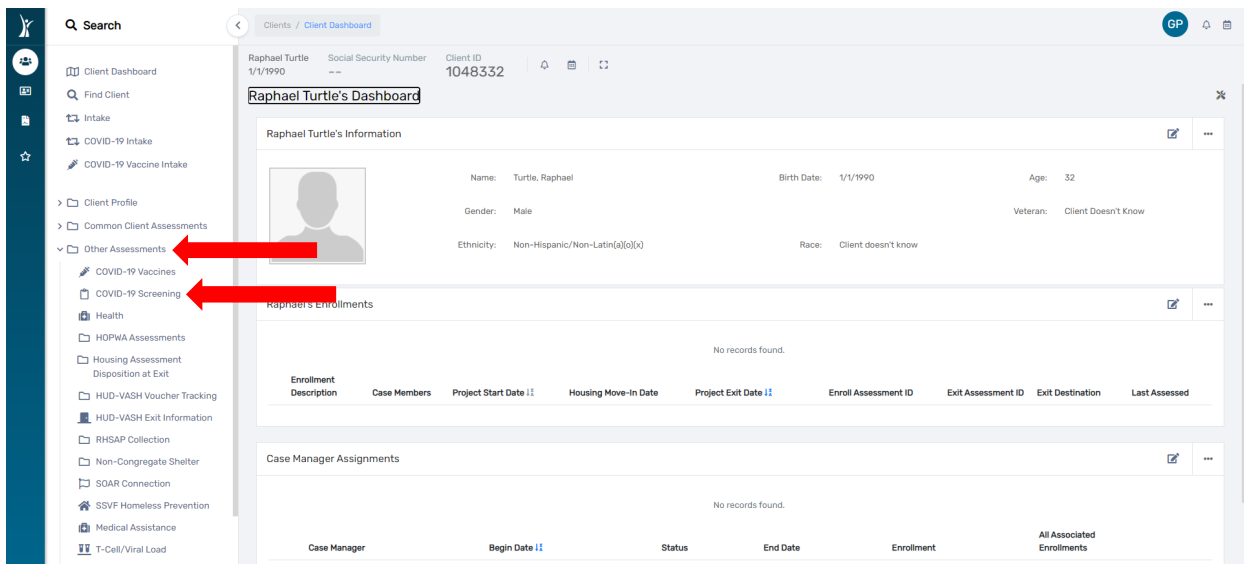
Contact Local Hotline: -- SELECT --

Save

20. To finish the assessment, please click **“Finish”**





21. 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”**



22. 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.**

The screenshot displays the 'ClientTrack Form' interface for a client named Raphael Turtle. The left sidebar contains a navigation menu with various assessment categories. The main content area is titled 'COVID-19 Screenings' and shows a table of screening history. A red box highlights the first row of the table, which contains the following data:

	Screening Date	Screening Result	Current Test Status	Test Result
 	10/24/2022	Asymptomatic Low Risk	Returned	Positive

Below the table, there is a 'Cancel' button. The interface also includes a search bar at the top and a '+ Add New Screening' button in the top right corner of the table area.

Please contact the help desk if you require additional assistance

HMISHelpDesk@ihcda.IN.gov

DVHelpDesk@ihcda.IN.gov