

Program Outcome Desk Guide

Client Track* Data Entry and Reporting

Produced by:
Strategic Planning, Research, and Evaluation Team,
Community Services Department (CSD)



** The database may be referred to as "CT" throughout this document*

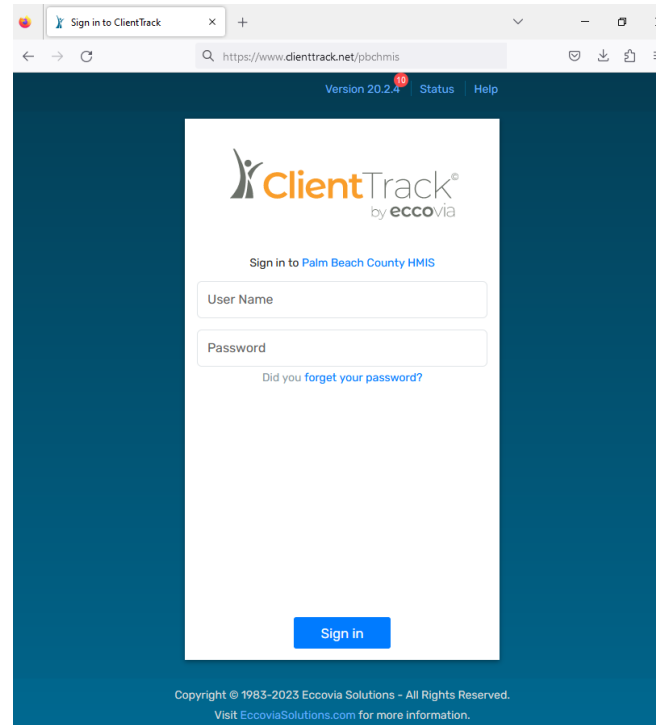
TABLE OF CONTENTS

Contents

LOG IN.....	3
DATA INTEGRITY	4
ENTERING SERVICES	5
DEMOGRAPHICS REPORT	7
OUTCOME ENTRY & REPORTING: Economic Stability - Intellectual Development Disability	25
Required Outcomes.....	Error! Bookmark not defined.
Outcome based on Self-Sufficiency Matrix	25
To enter a Self-Sufficiency Matrix assessment	26
To run a Self-Sufficiency Matrix (SSM) report.....	28
For all other required outcomes	29
To run a Service Summary Report: To record outcome achievement.....	30
Checklist of documents to be uploaded in SAMIS for Outcome Report submission each Quarter	31
OUTCOME ENTRY & REPORTING: Economic Stability - Seniors.....	32
Required Outcomes.....	32
Service Reports for required outcomes:	32
To run a Service Summary Report: To record outcome achievement.....	33
Checklist of documents to be uploaded in SAMIS for Outcome Report submission each Quarter	34
Accessing SAMIS for Quarter Reports	61
Access link	62
Steps.....	62
Quarterly Report Submission Time Plan	68
End of FY Data Verification	68
Contacts	69

LOG IN

- <https://www.clienttrack.net/pbchmis>
- CT is best used with Google Chrome and/or Mozilla Firefox
- Login with your User Name and Password
- If you are a new user, please contact David Tedesco (dtedesco@pbcgov.org) for the necessary user forms
 - If your agency terminates an employee with access to CT, please notify David Tedesco (dtedesco@pbcgov.org) to have the employee's access terminated as soon as possible.



DATA INTEGRITY

Please remember the importance of maintaining and reporting accurate data. When entering the data into ClientTrack, please ensure that you are completing all the required demographic fields and following all of the necessary steps outlined in this guide to correctly capture the services that your agency is providing to your program participants. Quarter Reports are intended to provide a snapshot of how program participants are progressing each quarter and should also be utilized as a tool for quality assurance within your organization. Data should be entered into ClientTrack in a timely manner and in accordance to your contract's programmatic requirements.

When providing the supplemental data reports, please certify that you have done the following:

- Downloaded all reports as 'Excel Data' – PDFs and regular excel downloads will not provide all the information needed to verify the numbers on the Quarter Reports.
- Removed any exact duplicates from the spreadsheet. This is more likely to apply to Data Explorer reports.
- Only provide data on the assessments that contribute towards your outcome determination for each program participant. Additional assessments done during the fiscal year to track progress can be omitted when submitting supplemental data.
- Clearly identify which program participant met the outcome, who did not meet the outcome, and who cannot be measured yet/at all.

ENTERING SERVICES

To enter a service:

- Go to the client page in ClientTrack
- Click on 'Enrollment and Services' from the left panel
- Click on 'Services'
 - Click Add 'New Service' from the top right

The screenshot displays the ClientTrack interface for a client named Joey Test (ClientID 7565). The left sidebar shows the navigation menu with 'Enrollment and Services' and 'Services' highlighted. The main content area is titled 'Client Services' and includes instructions on how to add or edit services. A table lists the client's service history, showing two services: 'Follow Up (60 Days)' on 03/14/2023 and 'Housing Needs Assessment' on 01/17/2023. The '+ Add New Service' button is highlighted with a red box.

Date	Service	Units	\$ Total	Organization
▼ March 2023 (1 Services)				
03/14/2023	Follow Up (60 Days)	1.00	\$0.00	
▼ January 2023 (1 Services)				
01/17/2023	Housing Needs Assessment	1.00	\$0.00	

- Select the correct Enrollment (based on your program name in the database)
- Select “FAA – Palm Beach County” as your Grant
- Select the desired option(s) for the Service
- *Everything else on the service form can be left as-is unless you’d like to add comments*
- Press ‘Save’ at the bottom of the page to complete.

Search Clients / Client Services / Service SC

Joey Test 3/4/1988 Male ClientID 7565

Service

Enrollment: * -- SELECT --

Grant: FAA - Palm Beach County

Service : * -- SELECT --

Location: -- SELECT --

Date: * 04/20/2023

Units Of Measure: * ☐ Dollars ☐ Minutes ☒ Count ☐ Hours

Units: * 1.00

Unit Value: * \$1.00

Total: \$1.00

User Performing the Service:

Comments:

Restriction: * ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Save Cancel

DEMOGRAPHICS REPORT

All programs entering data into CT should utilize the demographic report for Quality Assurance and as supplemental data when completing Quarter Reports. Demographic reports are populated from fields completed during the Client intake and/or enrollment to your program.

To run a demographic report in CT:

- Ensure you are in the correct workgroup (**HMIS User**)
- Go to the Reports page in ClientTrack
- Click on 'BNLs' from the left panel and select "HMIS Active Client List"
- Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program, Head of Household – if applicable) and press 'Report'
- When the report populates, click on the save icon to reveal a dropdown and export the report to Excel Data

HMIS Active Client List

HMIS Active Client - By Name List
Report Range: 4/1/2023 to 4/30/2023

Report Criteria
Report Type: Active at any point
Active Client Filter: Report Glossary Active Client
Organizations:
Programs:

Client ID	Client Name	SSN	Age	Gender	Race	Ethnicity	Veteran Status
-----------	-------------	-----	-----	--------	------	-----------	----------------

OUTCOME ENTRY & REPORTING: Economic Stability

Economic Stability Potential Services Required Outcomes

Emergency Financial Assistance

(Rental Assistance, Utility Assistance, Childcare Assistance, and Transportation Voucher Assistance)

% of eligible clients will have their crisis resolved through emergency financial assistance up to 45 days from completed intake.

Safety Net Navigation & Linkage Services

(SNAP Application Assistance, Medicaid Application Assistance, Unemployment Application Assistance)

% of clients will be successfully linked to safety net services within 7 days from program intake.

% of clients will be satisfied with the linkage to services as evidenced by a customer service survey after services are rendered.

Temporary Employment/Apprenticeship Services

% of clients will be successfully connected to the employment services within the fiscal year.

% of clients who obtained employment with a living wage or higher at the temporary employment/apprenticeship service.

Legal Services

% of households who prevented eviction during the fiscal year

Tax Preparation Services

% of households who Earned Income Tax Credit (EITC) at the time of service.

% of households who Claimed Child Tax Credit at the time of service.

OUTCOME ENTRY & REPORTING: Economic Mobility- Self Sufficiency and Securing Our Future Initiative (SOFI)

SOFI Video Training Recordings:

✚ SOFI Client Intake Process

Recording link: <https://pbc-gov.webex.com/pbc-gov/ldr.php?RCID=68578c5a79b16fdb8f038e3edd3cf109>

Password: kEfj69hc

✚ SOFI SSM Data Entry and Follow Up Assessments

Recording link: <https://pbc-gov.webex.com/pbc-gov/ldr.php?RCID=12206ad7a5ba8455e8c470f128774932>

Password: TnepjBs2

✚ Pulling Reports SSM and Employment Assessments

Recording link: <https://pbc-gov.webex.com/pbc-gov/ldr.php?RCID=a6135bc96b4a15e86276bb2dc623ee82>

Password: AzbXxRP3

✚ SOFI Financial Assessment Entry and Report Pull Training: <https://pbc-gov.webex.com/pbc-gov/ldr.php?RCID=921c4cd09f80bbba6749c952317b6f31>

Password: TjyFWQr4

OUTCOME ENTRY & REPORTING: Economic Mobility- Self Sufficiency and Securing Our Future Initiative (SOFI)

Clients will increase their self-sufficiency in at least (1) or more categories such as transportation, childcare, housing, employment, income, and education; including but not limited to family stability, well-being, financial management, education & training, and employment & career, income domains as evidenced by 1 point on the self-sufficiency matrix

This outcome is based on the Self-Sufficiency Matrix Assessment (SSM). At least four (4) assessments must be completed during the fiscal year. One per quarter. The outcome is measured from baseline in the fiscal year to the follow-up assessments and will be based on whether there is an increase by 1 point on the self-sufficiency matrix quarterly on the SSM in the categories above.

To enter a Self-Sufficiency Matrix assessment for **SOFI**:

- For SOFI Ensure you are in the correct workgroup (**PBC – CSD SOFI**)
- Go to the clients  page in Client Track
- Click on “Enrollments and Services” and select ‘Self Sufficiency Matrix’ from the left panel
- Click on ‘+ Add New SOFI SSM’



To enter a Self-Sufficiency Matrix for **SOFI** assessment (continued.):

- Enter the correct date for the assessment
- Select 'Assessment Type' (Entry for 1st, "Update" for all quarters after, Exit when leaving program)
- *You can enter any comments that you feel are relevant*
- Complete each of the categories and press 'Save' at the bottom of the page to complete entry

To enter a Self-Sufficiency Matrix assessment for **Self Sufficiency**:

- For Self Sufficiency ensure you are in the correct workgroup (**CMIS**)
- Go to the clients  page in Client Track
- Click on "Enrollments and Services" and select 'Self Sufficiency Matrix' from the left panel
- Click on '+ Add New **Self Sufficiency Matrix**'
- Enter the correct date for the assessment
- Select 'Assessment Type' (Entry for 1st, "Update" for all quarters after, Exit when leaving program)
- You can enter any comments that you feel are relevant
- Complete each of the categories and press 'Save' at the bottom of the page to complete entry

Self-Sufficiency Matrix

Assessment Date: 04/20/2023

Assessment Type: -- SELECT --

Comments:

Income:

- ☐ 1 - No Income
- ☐ 2 - Inadequate income and/or spontaneous or inappropriate spending
- ☐ 3 - Can meet basic needs with subsidy; appropriate spending
- ☐ 4 - Can meet basic needs and manage debt without assistance
- ☐ 5 - Income is sufficient, well managed; has discretionary income and is able to save
- ☐ 6 - Not Applicable

Employment:

- ☐ 1 - No Job
- ☐ 2 - Temporary, part-time or seasonal; inadequate pay; no benefits
- ☐ 3 - Employed full-time; inadequate pay; few or no benefits
- ☐ 4 - Employed full-time with adequate pay and benefits
- ☐ 5 - Maintains permanent employment with adequate income and benefits
- ☐ 6 - Not Applicable

And more below; scroll down

Save Cancel

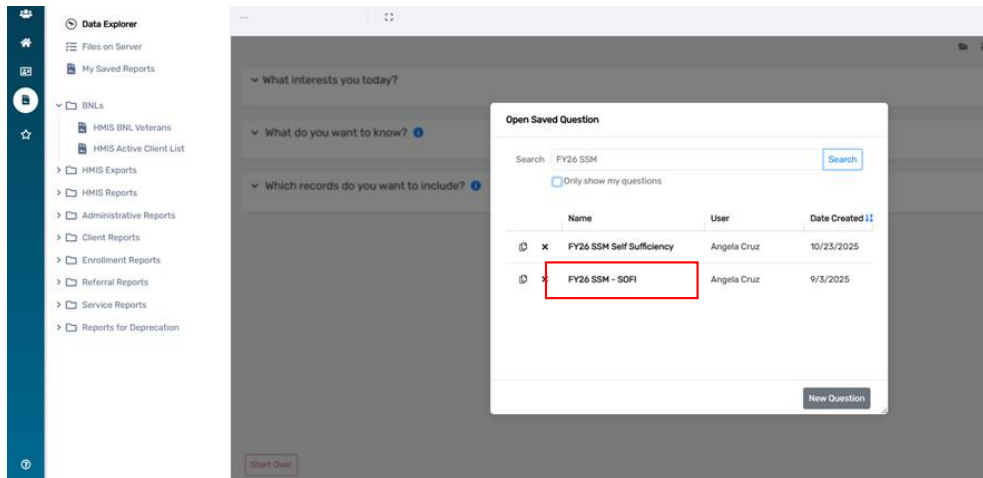
OUTCOME ENTRY & REPORTING: Economic Mobility

Clients will increase their self-sufficiency in at least (1) or more categories such as transportation, childcare, housing, employment, income, and education; including but not limited to family stability, well-being, financial management, education & training, and employment & career, income domains as evidenced by 1 point on the self-sufficiency matrix

To run a **SOFI** Self-Sufficiency Matrix (SSM) report:

- Make sure you use (HMIS User) workgroup then Go to the Reports page in CT
 - Select 'Data Explorer'
 - In the popup, deselect the option to "Only show my questions" and type in "FY26 SSM - SOFI"

- Look for the report created by Angela Cruz named “FY26 SSM-SOFI” and click on the double paper icon to the left of the question in order to copy the report
- Name the report whatever you’d like and press ‘Ok’



To run a Self-Sufficiency Matrix (SSM) report:

- Make sure you use (HMIS User) workgroup then Go to the Reports page in CT
 - Select ‘Data Explorer’
- In the popup, deselect the option to “Only show my questions” and type in “FY26 SSM - SOFI”
 - Look for the report created by Angela Cruz named “2025 SSM SOFI” and click on the double paper icon to the left of the question in order to copy the report
 - Name the report whatever you’d like and press ‘Ok’

The screenshot shows the 'Data Explorer' sidebar on the left with a list of reports including 'BNLs', 'HMIS BNL Veterans', 'HMIS Active Client List', 'HMIS Exports', 'HMIS Reports', 'Administrative Reports', 'Client Reports', 'Enrollment Reports', 'Referral Reports', 'Service Reports', and 'Reports for Deprecation'. The main area displays a list of questions with filters for 'What interests you today?', 'What do you want to know?', and 'Which records do you want to include?'. A modal titled 'Open Saved Question' is open, showing a search bar with 'FY26 SSM' and a 'Search' button. Below the search bar is a checkbox for 'Only show my questions'. A table lists saved questions with columns for Name, User, and Date Created. The first row, 'FY26 SSM Self Sufficiency' by Angela Cruz, is highlighted with a red box. The second row is 'FY26 SSM - SOFI' by Angela Cruz. A 'New Question' button is at the bottom right of the modal.

Data Explorer

- Files on Server
- My Saved Reports
- BNLs
 - HMIS BNL Veterans
 - HMIS Active Client List
- HMIS Exports
- HMIS Reports
- Administrative Reports
- Client Reports
- Enrollment Reports
- Referral Reports
- Service Reports
- Reports for Deprecation

What interests you today?

What do you want to know?

Which records do you want to include?

Open Saved Question

Search: FY26 SSM Search

☐ Only show my questions

Name	User	Date Created
 x FY26 SSM Self Sufficiency	Angela Cruz	10/23/2025
 x FY26 SSM - SOFI	Angela Cruz	9/3/2025

New Question

OUTCOME ENTRY & REPORTING: Economic Mobility - Income

Clients will increase their household income as evidence on the financial assessment at program entry and exit.

All agencies participating in the Securing Our Future Initiative (SOFI) should be entering income information for their clients. Financial Assessments are collected at program entry, October 15 and at Exit in HMIS/CMIS.

When enrolling a client into your program, you will complete an intake Income Assessment. This would be the baseline assessment. Please ensure you are using the **PBC – CSD SOFI** workgroup.

Video Training for entering income and pulling Income/ Financial Assessment report:

<https://pbc-gov.webex.com/pbc-gov/ldr.php?RCID=921c4cd09f80bbba6749c952317b6f31>

Password: TjyFWQr4

For how to screenshots see below:

Intake (2298)

Joey Test 3/4/1988 Male Client ID 561-123-7777 7565

Income and Sources, Non-Cash Benefits

Assessment Date: 04/24/2023

Income from Any Source: Yes

Non-Cash Benefits from Any Source: No

Expenses: Client Refused

Did Client Increase or Decrease Income: Data Not Collected

Did Client Maintain Wages for 90 Days or More: -- SELECT --

Income

Type	Description	Monthly Amount	Restriction
☒	Earned Income (i.e., employment income)	\$1,000.00	Restrict to MOU/InfoRelease

Save and Close

OUTCOME ENTRY & REPORTING: Economic Mobility – Income (cont.)

To enter a Financial Assessment as an Update/Annual Assessment (aka. follow-up):

- Ensure you are in the correct workgroup (**PBC – CSD SOFI**)
- Go to the client page in Client Track (2nd option down from left menu)

- Click on the action dropdown “(...)” to the left of your client’s enrollment into your program and select ‘Update/Annual Assessment’.

The screenshot displays a web application interface for a client dashboard. The top navigation bar includes a search bar, a breadcrumb trail 'Clients / Joey Test's Dashboard', and user information 'SC'. The left sidebar contains a menu with options like Dashboard, Find Client, Intake - Self Sufficiency, COVID-19 Intake, Client Profile, Family & Contacts, Common Assessments, SPDAT Assessments, Enrollments and Services, and RHY Assessments.

The main content area shows 'Joey's Enrollments' with a table of 8 results. The table columns are Enrollment, Case Members, Enroll Date, Exit Date, Case Manager, Organization, and Acuity List Detail? The 'Update/Annual Assessment' option is highlighted in the action dropdown menu for the first enrollment.

Enrollment	Case Members	Enroll Date	Exit Date	Case Manager	Organization	Acuity List Detail?
Current						
P2P - Circles SOFI	1	04/24/2023				No
	1	09/13/2022				No
	1	06/01/2022				No

OUTCOME ENTRY & REPORTING: Economic Mobility – Income (cont.)

To enter a Financial Assessment as an Update/Annual Assessment (aka. follow-up) (cont.):

- Double check the family structure and select either “Save” or “No Changes”
- Click on “New During Program Enrollment/Update Assessment”
- Review the Universal Data Assessment components and press “Save”
- Review the Barriers/Special Needs components and press “Save” or “Save & Close” when complete
- Review the Domestic Violence Assessment and press “Save”
- Review and update the Income Assessment
 - Ensure that you are completing all of the required fields and answering all of the required questions
- When complete, press “Finish” to close the workflow

OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

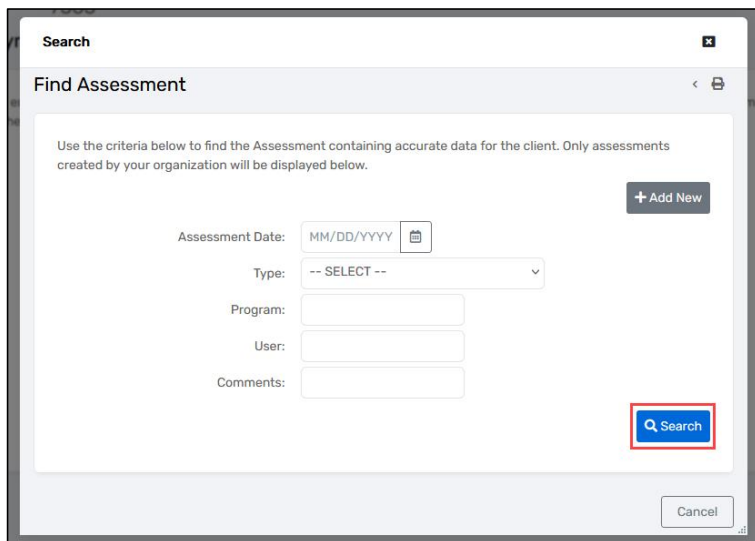
You must **first** have completed an updated assessment to link to your employment assessment see page 18 and do that first.

This outcome is based on the Employment Assessment. Assessments must be completed each quarter that the client is enrolled in the program during the fiscal year. The outcome is measured from baseline in the fiscal year to the follow-up assessment(s) and will be based on whether employment is **obtained, maintained or improved**. Improved (“better”) employment is defined as an increase in salary, increase in status, and increase in hours, or more benefits.

Video Tutorial:

To enter an Employment Assessment:

- Ensure you are in the correct workgroup (**PBC – CSD SOFI**)
- Go to the client page in ClientTrack
- Click on “Common Assessments” and select ‘Employment’ from the left panel
- Click on “+ Add New”
- On the following page, click on the search icon  in the center of the page to link your assessment with your program enrollment. In the Find Assessment search popup, leave the fields blank and click search to display all the possible choices. Select the Assessment Date / Type that applies to the current quarter.



OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

To enter an Employment Assessment (cont.):

- Enter Assessment Date, then Choose Assessment Time Frame, then complete all the required fields –
 - If Employed, there's "Maintained" (new option) or "Improved"
- Complete each of the questions and press 'Save' at the bottom of the page to complete entry

Assessment Date: * 10/05/2023

Assessment Time Frame: * Follow Up

Employed? * Yes

Type of Employment: * -- SELECT --

Did the client improve or maintain their employment? * -- SELECT --

Restriction: -- SELECT --

Improved

Maintained

Organization

InfoRelease

OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

If your agency did not enroll a client under the PBC – CSD SOFI workgroup prior to entering an Employment Assessment for that client, you will need to “link” your Employment Assessment to the client’s current enrollment into your program.

To link an Employment Assessment to the active Program Enrollment:

- Ensure you are in the correct workgroup (**PBC – CSD SOFI**)
- Go to the client page in ClientTrack
- Click on “Common Assessments” and select ‘Employment’ from the left panel
- Select the desired assessment to link and click the “Edit” icon to the left of the assessment information
- Click on the magnifying glass under “No Assessment Selected” to search for the enrollment. *The easiest way to search is to leave all fields blank and just press “Search” to display all your options.*

Search

Clients / Employment Assessments / HMIS 2017 Employment Assessment

Joey Test Male Client ID 561-123-7777
3/4/1988 7565

HMIS 2017 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: No Assessment Selected 🔍

Assessment Date: 05/23/2023 📅

Assessment Time Frame: Exit ▼

Employed?: Data Not Collected ▼

Restriction: ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease ⓘ

Save Cancel

OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

To link an Employment Assessment to the active Program Enrollment (cont.):

- Choose Enrollment types (i.e. entry for 1st, exit to leave program, during program enrollment/update for all quarter reports after first that are not exit).
- Once the link has been finalized, the Employment Assessment page will update to include the associated program enrollment.

Search

Find Assessment

13 results found.

Assessment Date	Type	Program	User	Comments	Grant Program Components
05/23/2023	Exit	P2P - Circles SOFI	David Tedesco		
05/23/2023	During Program Enrollment/Update	P2P - Circles SOFI	David Tedesco		
05/23/2023	Entry	P2P - Circles SOFI	David Tedesco		

Cancel

Clients / Employment Assessments / HMIS 2017 Employment Assessment

Joey Test
3/4/1988 Male
Client ID 7565
561-123-7777

HMIS 2017 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:

Date	Program	Type	User
5/23/2023	P2P - Circles SOFI	During Program Enrollment/Update	David Tedesco

Assessment Date: 05/23/2023

Assessment Time Frame: Exit

Employed?: Data Not Collected

Restriction: ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

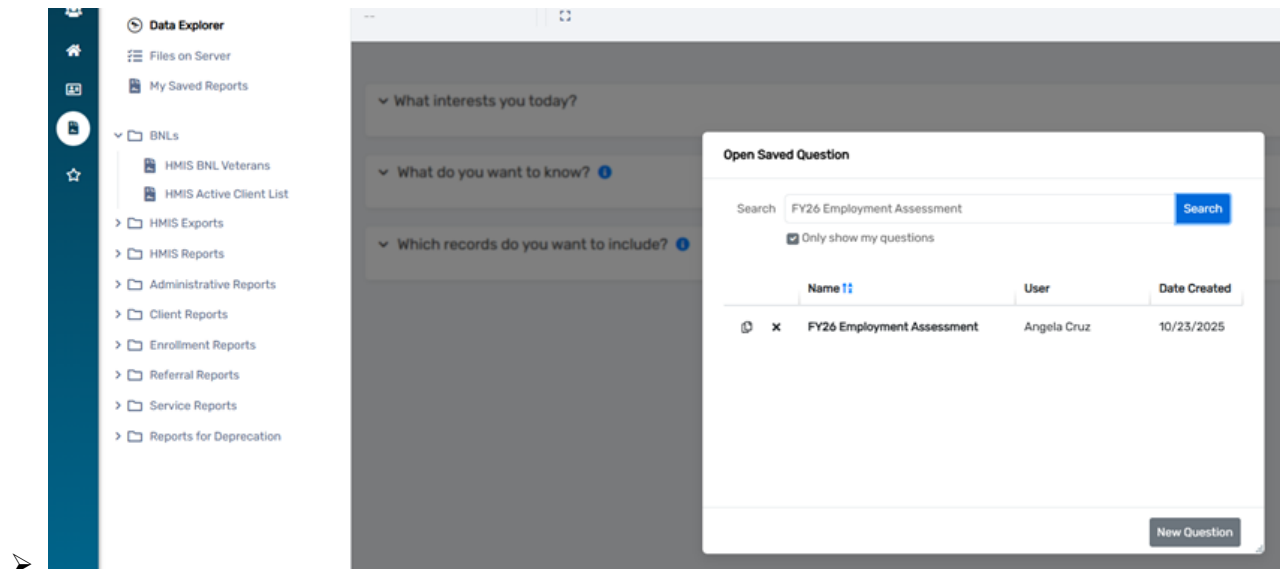
Save Cancel

OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

To run an Employment Assessment report:

- Go to the Reports page in CT
- Select 'Data Explorer'
- In the popup, deselect the option to "Only show my questions" and type in "FY26 Employment Assessment"
 - Look for the report created by Angela Cruz on 10/23/2025 and click on the double paper icon to the left of the question in order to copy the report
 - Name the report whatever you'd like and press 'Ok'



The screenshot shows the 'Data Explorer' interface. On the left is a sidebar with a navigation menu. The main area displays a search for 'FY26 Employment Assessment'. A modal window titled 'Open Saved Question' is open, showing a search bar with the text 'FY26 Employment Assessment' and a 'Search' button. Below the search bar is a checkbox labeled 'Only show my questions' which is checked. A table lists the search results:

Name	User	Date Created
 x FY26 Employment Assessment	Angela Cruz	10/23/2025

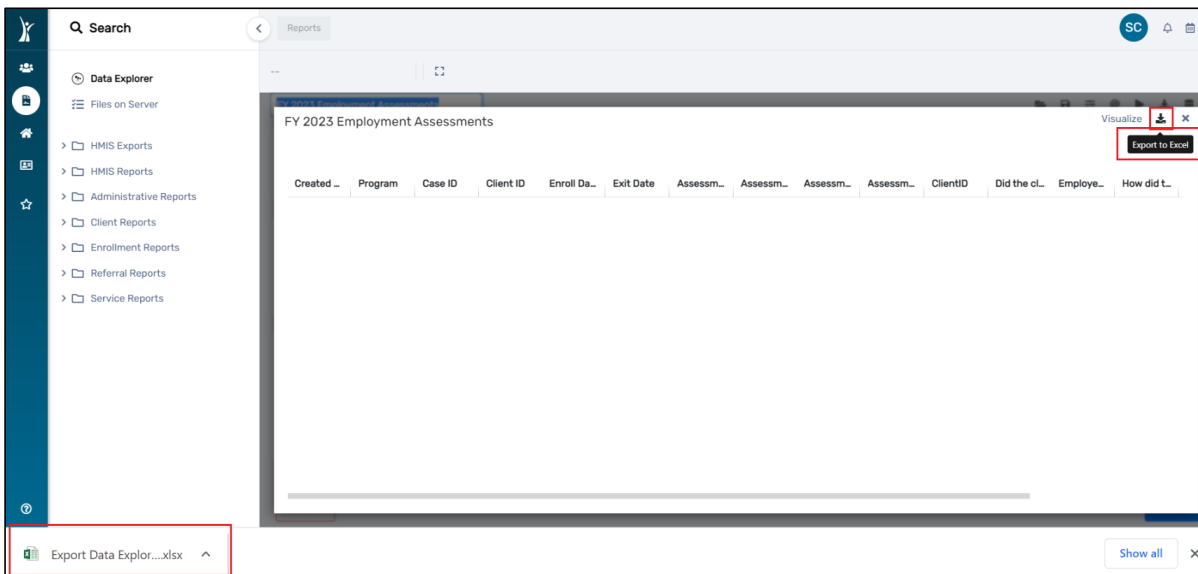
At the bottom right of the modal is a 'New Question' button.

OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

To run an Employment Assessment report (cont.):

- Change the program name to reflect your program name in CT and check to make sure any date ranges are updated as needed, then press 'Show me' to run the report
- Click on the download icon to obtain an excel spreadsheet version of the report



OUTCOME ENTRY & REPORTING: Intellectual Development Disability

Potential Services	Required Outcomes
i. Emergency Financial Assistance (Rental Assistance, Utility Assistance, Childcare Assistance, Transportation Voucher Assistance)	% of eligible clients will have their crisis resolved through emergency financial assistance up to 45 days from completed intake.
ii. Safety Net Navigation & Linkage Services (SNAP Application Assistance, Medicaid Application Assistance, Unemployment Application Assistance)	% of clients will be successfully linked to safety net services within 7 days from program intake. % of clients will be satisfied with the linkage to services as evidenced by a customer service survey after services are rendered.
iii. Case Management	% of individuals will achieve at least two (2) objectives on the Individualized Implementation Plan within the fiscal year.
iv. Supported Employment Services/Career Planning/center-based employment training	% of individuals will achieve at least two (2) objectives on the Individualized Implementation Plan within the fiscal year. % of individuals will maintain or increase their self-sufficiency in one (1) or more categories such as transportation, childcare, housing, employment, income, and education, as measured on the self-sufficiency matrix
v. Life Skills (Financial Literacy/Computer Skills Training/Employment Skills Training)	% of individuals will achieve at least two (2) <i>objectives</i> on the Individualized Implementation Plan within the fiscal year.
vi. Day Programming	
vii. Supported Living Services	
viii. Retirement Services	
ix. Respite for Caregivers	

Outcome based on Self-Sufficiency Matrix

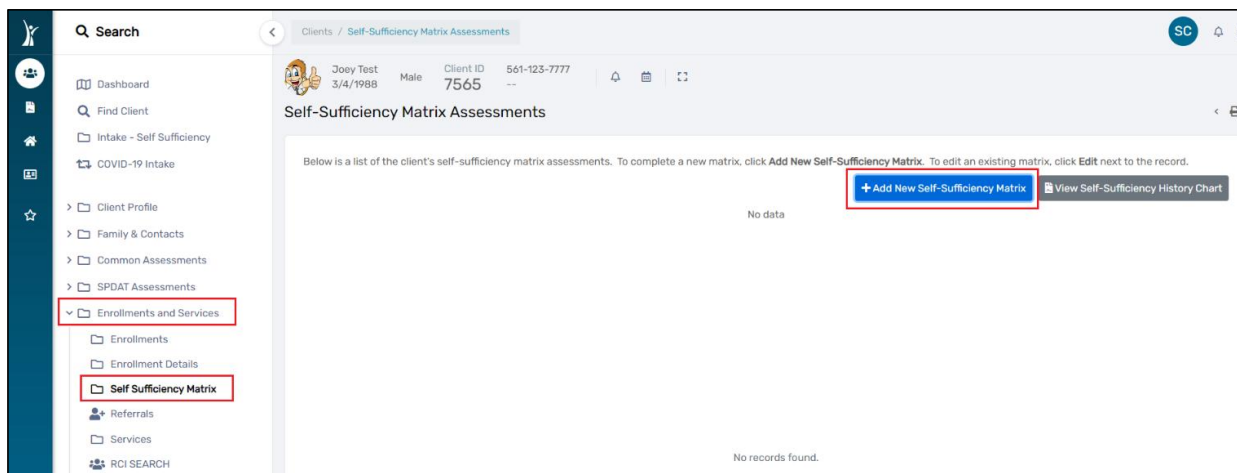
One of the outcomes listed above is based on the Self-Sufficiency Matrix Assessment (SSM). At least two (2) SSM assessments must be completed during the fiscal year. The outcome is measured from baseline in the fiscal year to the follow-up assessment and will be based on

whether there is an increase/maintenance on the SSM in one or more categories such as transportation, childcare, housing, employment, income, and education

Note: It is mandatory to also enter the key services and pull the service report for this required outcome.

To enter a Self-Sufficiency Matrix assessment

- Ensure you are in the correct workgroup (**PBC – CSD SOFI**)
- Go to the client page in ClientTrack
- Click on “Enrollments and Services” and select ‘Self Sufficiency Matrix’ from the left panel
- Click on ‘+ Add New Self-Sufficiency’



- Enter the correct date for the assessment
- Select 'Assessment Type' (Entry for 1st, "Update" for all quarters after, Exit when leaving program)
- You can enter any comments that you feel are relevant

- Complete each of the categories and press 'Save' at the bottom of the page to complete entry

The screenshot shows a web application interface for a 'Self-Sufficiency Matrix' assessment. On the left is a dark blue sidebar with a search bar and a list of navigation items: Dashboard, Find Client, Intake - Self Sufficiency, COVID-19 Intake, Client Profile, Family & Contacts, Common Assessments, SPDAT Assessments, Enrollments and Services (with sub-items: Enrollments, Enrollment Details, Self Sufficiency Matrix, Referrals, Services, RCI SEARCH, CE Services, Acuity List Detail History), and RHY Assessments. The main content area has a header with a back arrow, breadcrumb 'Clients / Self-Sufficiency Matrix Assessments / Self-Sufficiency Matrix', and a user profile for 'Joey Test' (3/4/1988, Male, Client ID 7565, 561-123-7777). Below the header is the 'Self-Sufficiency Matrix' form. The form includes fields for 'Assessment Date' (04/20/2023) and 'Assessment Type' (-- SELECT --), a 'Comments' text area, and two sections of radio button options: 'Income' (6 options) and 'Employment' (6 options). A red box highlights the 'Assessment Date' and 'Assessment Type' fields. Another red box highlights the 'Income' and 'Employment' sections. A red text annotation 'And more below; scroll down' is placed to the right of the 'Employment' section. At the bottom right of the form are 'Save' and 'Cancel' buttons.

Search

Clients / Self-Sufficiency Matrix Assessments / Self-Sufficiency Matrix

Joey Test
3/4/1988 Male Client ID 7565 561-123-7777

Self-Sufficiency Matrix

Assessment Date: 04/20/2023

Assessment Type: -- SELECT --

Comments:

Income:

- ☐ 1 - No Income
- ☐ 2 - Inadequate income and/or spontaneous or inappropriate spending
- ☐ 3 - Can meet basic needs with subsidy; appropriate spending
- ☐ 4 - Can meet basic needs and manage debt without assistance
- ☐ 5 - Income is sufficient, well managed; has discretionary income and is able to save
- ☐ 6 - Not Applicable

Employment:

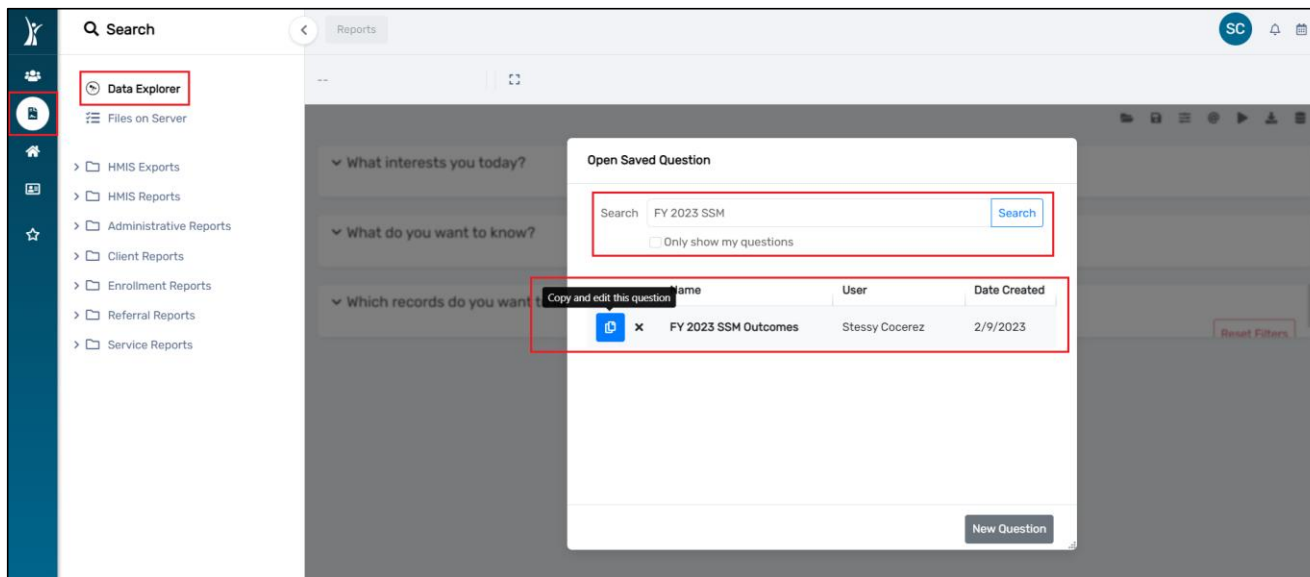
- ☐ 1 - No Job
- ☐ 2 - Temporary, part-time or seasonal; inadequate pay; no benefits
- ☐ 3 - Employed full-time; inadequate pay; few or no benefits
- ☐ 4 - Employed full-time with adequate pay and benefits
- ☐ 5 - Maintains permanent employment with adequate income and benefits
- ☐ 6 - Not Applicable

And more below; scroll down

Save Cancel

To run a Self-Sufficiency Matrix (SSM) report

- Make sure you use (HMIS User) workgroup then Go to the Reports page in CT
- Select 'Data Explorer'
- In the popup, deselect the option to "Only show my questions" and type in "2025 SSM SOFI"
 - Look for the report created by Angela Cruz on 7/30/2025 and click on the double paper icon to the left of the question in order to copy the report
 - Name the report whatever you'd like and press 'Ok'



- Change the program name to reflect your program name in CT and check to make sure any date ranges are updated as needed, then press 'Show me' to run the report

- Click on the download icon to obtain an Excel spreadsheet version of the report

The screenshot shows the 'Data Explorer' application. On the left is a sidebar with a search bar and a list of folders: 'Data Explorer', 'Files on Server', 'HMIS Exports', 'HMIS Reports', 'Administrative Reports', 'Client Reports', 'Enrollment Reports', 'Referral Reports', and 'Service Reports'. The main content area displays a report titled 'FY 2023 SSM Outcomes' with the subtitle '4 results found.' Below this is a table with the following columns: 'Created ...', 'Program', 'Client ID', 'Birth Date', 'Gender', 'Race', 'Ethnicity', 'Veteran ...', 'Zip Code', 'SSM Ass...', 'Total Sco...', 'Enroll Da...', and 'Exit Date'. In the top right corner of the report area, there are three icons: 'Visualize', a download icon (highlighted with a red box and labeled 'Export to Excel'), and a close icon. At the bottom left of the application window, a file explorer shows 'Export Data Explorer.xlsx' (highlighted with a red box). At the bottom right, there is a 'Show all' button.

For all other required outcomes

All outcomes that DO NOT require an SSM are based on services (see earlier section on **Entering Services**)

The outcome is measured through entering the services attached to the program in the Quarter, then reporting the outcomes as 'achieved' or 'not achieved'.

To run a Service Summary Report: To record outcome achievement

1. Click on Client Dashboard
2. Click on “Enrollment and Services”
3. Click on “Services”



4. Click on “Add New Service”

5. Add Enrollment, Grant, Services
 - Follow Up Service (Outcome Achieved, Not Achieved)

This screenshot shows the 'Add New Service' form. A green arrow labeled '4' points to the 'Add New Service' button at the top. Below the button, there is a section for 'Family Income' with fields for 'No Recent Income', 'Family Members' (3), and 'Poverty Level' (\$2,151.67). A green arrow labeled '5' points to the 'Enrollment' dropdown menu. Below this, there are fields for 'Grant' (AACV - Caregiving Youth Project), 'Service' (Follow Up Service: Outcome Achieved), 'Date' (11/05/2024), 'Units Of Measure' (Dollars, Minutes, Count, Hours), 'Units' (1.00), 'Unit Value' (\$0.00), 'Total' (\$0.00), 'User Performing the Service' (Joanna Reid), and a 'Comments' text area.

6. Add Enrollment, Grant, Services

- Follow Up Service (Stably Housed, Unstably Housed)

The screenshot shows the SAMIS system interface for adding enrollment, grant, and services. A green arrow labeled '6' points to the 'Service' dropdown menu. The form includes the following fields and options:

- Family Income:** No Recent Income
- Family Members:** 3
- Poverty Level:** \$2,151.67
- Enrollment:** -- SELECT --
- Grant:** AAF - FAA Rapid Rehousing
- Service:** Stably Housed
- Date:** 11/05/2024
- Units Of Measure:**
 - ☐ Dollars
 - ☐ Minutes
 - ☒ Count
 - ☐ Hours
- Units:** 1.00
- Unit Value:** \$0.00
- Total:** \$0.00
- User Performing the Service:** Joanna Reid
- Comments:** (Empty text area)
- Restriction:**
 - ☐ Restrict to Organization
 - ☒ Restrict to MDU/InfoRelease

Checklist of documents to be uploaded in SAMIS for Outcome Report submission each Quarter

1. **Outcome Report** – Submit the Excel based report with correct submission date and all relevant fields completed and verified for data quality.
2. **HMIS active client list for the quarter:** Ensure the demographic data is complete and of good quality in the Excel based report. The counts of clients in the active client list should match with the Outcome Report.
3. **Service Summary report:** Submit the Excel based report, indicating the number of clients that achieved the outcome. Ensure that this matches the numbers in the Outcome Report.
4. **SSM report** (For programs reporting on SSM): Submit the Excel based report showing all pre and post (if applicable) SSM scores.

OUTCOME ENTRY & REPORTING: Seniors

Required Outcomes

Potential Services	Required Outcomes
i. Adult Day Care Services	% of seniors with Dementia, Alzheimer's, or cognitive related conditions served will delay or eliminate the need for nursing home placement
ii. Caregiver Services	% of individual caregivers who improve or maintain home-based care for a senior with Dementia, Alzheimer's, or cognitive-related conditions

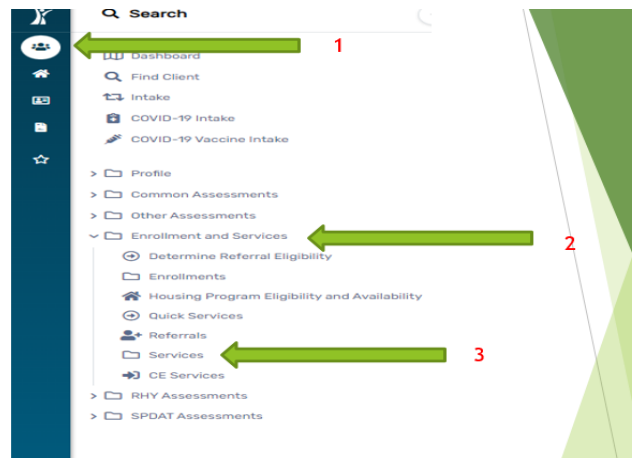
Service Reports for required outcomes:

All outcomes are based on services (see earlier section on [Error! Reference source not found.](#)).

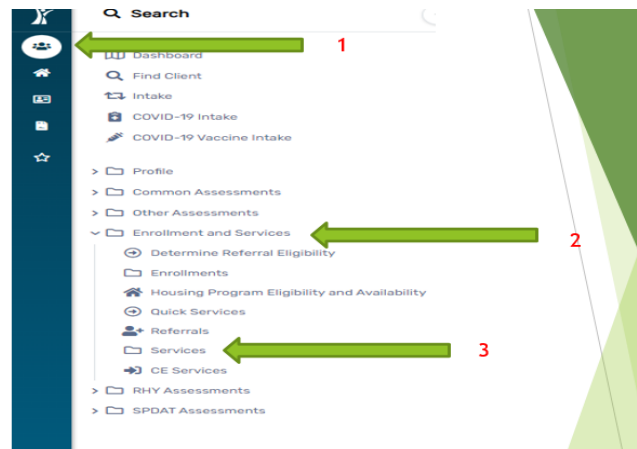
The outcome is measured through entering the services attached to the program in the Quarter, then reporting the outcomes as 'achieved' or 'not achieved'.

To run a Service Summary Report: To record outcome achievement

1. Click on Client Dashboard
2. Click on “Enrollment and Services”
3. Click on “Services”



1. Click on Client Dashboard
2. Click on “Enrollment and Services”
3. Click on “Services”



6. Add Enrollment, Grant, Services

- Follow Up Service (Stably Housed, Unstably Housed)

Family Income:

No Recent Income

Family Members: 3

Poverty Level: \$2,151.67

Enrollment: -- SELECT --

Grant: AAF - FAA Rapid Rehousing

Service: Stably Housed

Date: 11/05/2024

Units Of Measure: ☐ Dollars ☐ Minutes ☒ Count ☐ Hours

Units: 1.00

Unit Value: \$0.00

Total: \$0.00

User Performing the Service: Joanna Reid

Comments:

Restriction: ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Checklist of documents to be uploaded in SAMIS for Outcome Report submission each Quarter

1. **Outcome Report** – Submit the Excel based report with correct submission date and all relevant fields completed and verified for data quality.
2. **HMIS active client list for the quarter:** Ensure the demographic data is complete and of good quality in the Excel based report. The counts of clients in the active client list should match with the Outcome Report.
3. **Service Summary report:** Submit the Excel based report, indicating the number of clients that achieved the outcome. Ensure that this matches the numbers in the Outcome Report.

OUTCOME ENTRY & REPORTING: Homelessness

Rapid Re-Housing Outcome 1: % clients served will exit to permanent housing

This outcome is based on the client's Exit Destination after leaving the program.

To enter Exit Destination information:

- Go to the client page in ClientTrack
- Click on the action dropdown “(...)” to the left of your client's enrollment into your program and select ‘Exit the Enrollment’

The screenshot displays the ClientTrack interface for a client named Joey Test. The client's profile information is shown at the top, including gender (Male), client ID (7565), and ethnicity (Hispanic/Latin(a)(o)(x)). Below this, the 'Joey's Enrollments' section shows a table with 8 results found. The table has columns for Enrollment, Case Members, Enroll Date, Exit Date, Case Manager, Organization, and Acuity List Detail. A dropdown menu is open for the first enrollment, 'P2P - Circles SOFI', showing options like 'Acuity List Detail', 'Edit Enrollment Workflow', 'Add Family Member', 'View Case Members', 'Update/Annual Assessment', 'Link Assessments', 'Associated Assessments', 'Exit the Enrollment' (highlighted), 'Review Entry Assessments', and 'Delete Enrollment'.

Enrollment	Case Members	Enroll Date	Exit Date	Case Manager	Organization	Acuity List Detail?
P2P - Circles SOFI	1	04/24/2023				No
	1	09/13/2022				No
	1	06/01/2022				No

OUTCOME ENTRY & REPORTING: Homelessness

Clients served will exit to permanent housing, Continued

To enter Exit Destination information (cont.):

- Complete the Enrollment Exit (i.e. Exit Date, Destination, Exit Reason) and press “Save”
- Complete the Universal Data Assessment, the Barriers/Special Needs Assessment, and the Income Assessment
- When complete, press “Finish” to close the workflow

The screenshot shows the 'HUD Program Exit' interface for client 'Joey Test'. The client's details are: Male, 3/4/1988, Client ID 7565, and phone number 561-123-7777. The 'Exit Enrollment' section is active, showing 'Exit Assessments' as a sub-option. The main form area is titled 'Enrollment Exit' and contains the following fields:

- Exit Date:** 04/24/2023 (with a calendar icon)
- Destination:** Staying or living with family, permanent tenure (dropdown menu)
- Exit Reason:** Completed Program (dropdown menu)
- Case Manager Assignment:** (with an information icon)
- End Case Assignment:** (checked checkbox with an information icon)

At the bottom right, there is a blue 'Save' button. The left sidebar contains navigation links: Dashboard, Find Client, Intake - Self Sufficiency, COVID-19 Intake, Client Profile, Family & Contacts, Common Assessments, Domestic Violence, Barriers, Master Assessments, Employment, Education - Adult, and Education - Child. The bottom status bar shows 'javascript:void(0); Financial'.

OUTCOME ENTRY & REPORTING: Homelessness

Clients served will exit to permanent housing, Continued

To run a report to display Exit Destination:

- Ensure you are in the correct workgroup (**HMIS User**)
- Go to the Reports page in ClientTrack
- Click on 'BNLs' from the left panel and select "HMIS Active Client List"
- Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program, Head of Household – if applicable) and press 'Report'
- When the report populates, click on the save icon to reveal a dropdown and export the report to Excel Data
- Within the report, look at the columns for Exit Destinations to identify which are considered 'Permanent'

The screenshot displays the ClientTrack interface for the 'HMIS Active Client List' report. On the left, a navigation pane shows 'BNLs' expanded with 'HMIS Active Client List' selected. The main area shows the report title 'HMIS Active Client - By Name List' and the report range '4/1/2023 to 4/30/2023'. Below this, the 'Report Criteria' section includes 'Report Type: Active at any point', 'Active Client Filter: Report Glossary Active Client', and 'Organizations:'. A table with columns 'Client ID', 'Client Name', 'SSN', 'Age', 'Gender', 'Race', 'Ethnicity', and 'Veteran Status' is visible at the bottom. A red box highlights the save icon (a floppy disk) in the top toolbar, which has opened a dropdown menu. The 'Excel Data' option in this menu is also highlighted with a red box. Other options in the menu include 'Excel', 'PDF', and 'Word'.

OUTCOME ENTRY & REPORTING: Homelessness

Individuals do not return to homelessness

- **Homeless Prevention Outcome 2:** % Clients will not return to homelessness within 6 months of receiving financial assistance
- **Rapid Re-Housing Outcome 2:** % Clients served will not return to homelessness within 6 months of program exit
- **Permanent Supportive Housing Outcome 2:** % Clients served will not return to homelessness 6 months from program enrollment.

This outcome is based on the client's exit from the program and their reentry into the Homelessness system.

To enter Exit Destination information:

- Go to the client page in ClientTrack
- Click on the action dropdown “(...)” to the left of your client's enrollment into your program and select ‘Exit the Enrollment’

The screenshot displays the ClientTrack interface for a client named Joey Test. The client's profile information is shown at the top, including their name, gender (Male), date of birth (3/4/1988), client ID (7565), and contact information (561-123-7777). The client's ethnicity is listed as Hispanic/Latin(a)(o)(x) and their race as Black, African American, or African.

The main section of the interface is titled 'Joey's Enrollments' and shows a table of enrollment records. The table has columns for Enrollment, Case Members, Enroll Date, Exit Date, Case Manager, Organization, and Acuity List Detail. There are 8 results found.

Enrollment	Case Members	Enroll Date	Exit Date	Case Manager	Organization	Acuity List Detail?
Current						
P2P - Circles SOFI	1	04/24/2023				No
Acuity List Detail	1	09/13/2022				No
Edit Enrollment Workflow						
Add Family Member						
View Case Members						
Update/Annual Assessment						
Link Assessments						
Associated Assessments						
Exit the Enrollment						
Review Entry Assessments						
Delete Enrollment						

The 'Exit the Enrollment' action is highlighted in the dropdown menu. The bottom of the interface shows a status bar with '4 results found'.

OUTCOME ENTRY & REPORTING: Homelessness

Individuals do not return to homelessness, Continued

To enter Exit Destination information (cont.):

- Complete the Enrollment Exit (i.e. Exit Date, Destination, Exit Reason) and press “Save”
- Complete the Universal Data Assessment, the Barriers/Special Needs Assessment, and the Income Assessment
- When complete, press “Finish” to close the workflow

The screenshot shows a web application interface for the HUD Program Exit Enrollment Exit form. The left sidebar contains a search bar and a navigation menu with options like Dashboard, Find Client, Intake - Self Sufficiency, COVID-19 Intake, Client Profile, Family & Contacts, Common Assessments, Domestic Violence, Barriers, Master Assessments, Employment, Education - Adult, and Education - Child. The main content area displays the client's information: Joey Test, 3/4/1988, Male, Client ID 7565, and 561-123-7777. The form is titled "Enrollment Exit" and includes a "To exit the client from the Enrollment, enter the Exit Date and Destination." instruction. The form fields are: Exit Date (04/24/2023), Destination (Staying or living with family, permanent tenure), and Exit Reason (Completed Program). There are also checkboxes for Case Manager Assignment and End Case Assignment, both of which are checked. A "Save" button is located at the bottom right of the form.

HUD Program Exit

Enrollment Exit

To exit the client from the Enrollment, enter the Exit Date and Destination.

Exit Date: 04/24/2023

Destination: Staying or living with family, permanent tenure

Exit Reason: Completed Program

Case Manager Assignment: ☒

End Case Assignment: ☒

Save

OUTCOME ENTRY & REPORTING: Homelessness

Individuals do not return to homelessness, Continued

To run a report for Returns to Homelessness:

- Go to the Reports page in ClientTrack
- Click on 'HMIS Reports' from the left panel and select "System Performance Measures (2022)"
- Complete the necessary fields to obtain the report for your program (i.e. Measure to Run, Date range, Organization, Program)
 - Measure should be 'Performance Measure 2'
 - Note that when running this report, the date range should be two (2) years in the future based on the beginning of the current fiscal year (i.e. if the current fiscal year starts on 10/1/2022 and ends on 9/30/2023, then the report dates should be 10/1/2024 to 9/30/2025)

HMIS 2022 System Performance Measures Report

Measure to Run

Measure: Performance Measure 2

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: -- SELECT --

Service Date Between: 10/01/2024 and 09/30/2025

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.

Note: This filter only applies to the initial client universe.

Organization(s): ☒ Filter by Organization(s)

Report Schedule Report Cancel

OUTCOME ENTRY & REPORTING: Homelessness

Individuals do not return to homelessness, Continued

To run a report for Returns to Homelessness (cont.):

- Once complete, press “Report”
- When the report populates, click on the save icon to reveal a dropdown and export the report to Excel Data

The screenshot shows the 'HMIS 2022 System Performance Measures Report' interface. A dropdown menu is open, showing options: Excel, Excel Data, PDF, and Word. The 'Excel Data' option is highlighted. The report content includes 'Report Criteria' and a table for 'Measure 2a and 2b: The Extent to which Persons who Exit Homelessness to Permanent Housing Destinations Return to Homelessness within 6 to 12 months (and 24 months in a separate calculation)'.

	Total Number of Persons who Exited to a Permanent Housing Destination (2 Years Prior)	Number Returning to Homelessness in Less than 6 Months (0 - 180 days)	Percentage of Returns in Less than 6 Months (0 - 180 days)	Number Returning to Homelessness from 6 to 12 Months (181 - 365 days)	Percentage of Returns from 6 to 12 Months (181 - 365 days)	Number Returning to Homelessness from 13 to 24 Months (366 - 730 days)	Percentage of Returns from 13 to 24 Months (366 - 730 days)	Number of Returns in 2 Years	Percentage of Returns in 2 Years
Exit was from PH	7	0	0.00%	0	0.00%	0	0.00%	0	0.00%
TOTAL Returns to Homelessness	7	0	0.00%	0	0.00%	0	0.00%	0	0.00%

ClientTrack™ Reports
Page 1 of 1
Stessy Cocerez
4/25/2023 2:22 PM
Organization(s): Filter by Organization(s)
Report Schedule Report Cancel

The screenshot shows the Excel spreadsheet with the following data:

D	E	H	I	J	K	L	T	U	V	W	X
ExitToPH_EnrollID	ExitToPH_CaseID	ExitToPH_EnrollDate	ExitToPH_ExitDate	ExitToPH_Destination	ProgramTypeGroup	GroupOrder	ReturnedUnder6Months	Returned6to12Months	Returned13to24Months	Inherited	
1	10/22/2019	3/7/2023	Staying or living with family, permanent tenure	Exit was from PH	50	0	0	0	0		
2	10/22/2019	3/7/2023	Staying or living with family, permanent tenure	Exit was from PH	50	0	0	0	0		
3	10/22/2019	3/7/2023	Staying or living with family, permanent tenure	Exit was from PH	50	0	0	0	0		
4	11/15/2019	10/23/2022	Rental by client, no ongoing housing subsidy	Exit was from PH	50	0	0	0	0		
5	11/15/2019	10/27/2022	Rental by client, no ongoing housing subsidy	Exit was from PH	50	0	0	0	0		
6	11/15/2019	10/27/2022	Rental by client, no ongoing housing subsidy	Exit was from PH	50	0	0	0	0		
7	11/15/2019	10/27/2022	Rental by client, no ongoing housing subsidy	Exit was from PH	50	0	0	0	0		
8	11/15/2019	10/27/2022	Rental by client, no ongoing housing subsidy	Exit was from PH	50	0	0	0	0		

OUTCOME ENTRY & REPORTING: Homelessness

Permanent Supportive Housing Outcome 1: % Clients served will remain stably housed or exit to HUD defined Permanent Housing

This outcome is based on the client's Exit Destination after leaving the program OR their current living status as an enrollee in a Permanent Housing location.

To enter Exit Destination information:

- Go to the client page in ClientTrack
- Click on the action dropdown "(...)" to the left of your client's enrollment into your program and select 'Exit the Enrollment'

The screenshot displays the ClientTrack interface for a client named Joey Test. The client's profile information is shown at the top, including their name, gender (Male), date of birth (3/4/1988), and Client ID (7565). Below this, the 'Joey's Enrollments' section is visible, showing a table of enrollment records. The table has columns for Enrollment, Case Members, Enroll Date, Exit Date, Case Manager, Organization, and Acuity List Detail. A dropdown menu is open for the first enrollment record, showing options such as 'Acuity List Detail', 'Edit Enrollment Workflow', 'Add Family Member', 'View Case Members', 'Update/Annual Assessment', 'Link Assessments', 'Associated Assessments', 'Exit the Enrollment' (highlighted), 'Review Entry Assessments', and 'Delete Enrollment'.

Enrollment	Case Members	Enroll Date	Exit Date	Case Manager	Organization	Acuity List Detail?
P2P - Circles SOFI	1	04/24/2023				No
Acuity List Detail	1	09/13/2022				No
Edit Enrollment Workflow						
Add Family Member	1	06/01/2022				No
View Case Members						
Update/Annual Assessment						
Link Assessments						
Associated Assessments						
Exit the Enrollment						
Review Entry Assessments						
Delete Enrollment						

OUTCOME ENTRY & REPORTING: Homelessness

Clients served will remain stably housed or exit to HUD defined Permanent Housing, Continued

To enter Exit Destination information (cont.):

- Complete the Enrollment Exit (i.e. Exit Date, Destination, Exit Reason) and press “Save”
- Complete the Universal Data Assessment, the Barriers/Special Needs Assessment, and the Income Assessment
- When complete, press “Finish” to close the workflow

The screenshot shows a web application interface for managing client data. On the left is a dark blue sidebar with navigation icons and a search bar. The main content area is titled 'HUD Program Exit' and 'Enrollment Exit'. It displays client information: Joey Test, 3/4/1988, Male, Client ID 7565, and phone number 561-123-7777. Below this, there's a form to exit the client from the Enrollment. The form includes fields for Exit Date (04/24/2023), Destination (Staying or living with family, permanent tenure), and Exit Reason (Completed Program). There are also checkboxes for Case Manager Assignment and End Case Assignment. A 'Save' button is at the bottom right.

Search

Clients / Joey Test's Dashboard

HUD Program Exit

Enrollment Exit

To exit the client from the Enrollment, enter the Exit Date and Destination.

Exit Date: 04/24/2023

Destination: Staying or living with family, permanent tenure

Exit Reason: Completed Program

Case Manager Assignment: ☐

End Case Assignment: ☒

Save

OUTCOME ENTRY & REPORTING: Homelessness

Clients served will remain stably housed or exit to HUD defined Permanent Housing, Continued

To run a report to display Exit Destination:

- Ensure you are in the correct workgroup (**HMIS User**)
- Go to the Reports page in ClientTrack
- Click on 'BNLs' from the left panel and select "HMIS Active Client List"
- Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program, Head of Household – if applicable) and press 'Report'
- When the report populates, click on the save icon to reveal a dropdown and export the report to Excel Data
- Within the report, look at the columns for Exit Destinations to identify which are considered 'Permanent'
 - If client is still enrolled in a Permanent Housing program, they are also considered a positive outcome

The screenshot displays the ClientTrack interface for the 'HMIS Active Client List' report. The left sidebar shows a navigation menu with 'BNLs' expanded, highlighting 'HMIS Active Client List'. The main panel shows the report title 'HMIS Active Client – By Name List' and the report range '4/1/2023 to 4/30/2023'. Below this, the 'Report Criteria' section includes 'Report Type: Active at any point', 'Active Client Filter: Report Glossary Active Client', and 'Organizations:'. The 'Programs:' section is currently empty. A table header is visible at the bottom with columns: Client ID, Client Name, SSN, Age, Gender, Race, Ethnicity, and Veteran Status. In the top right of the report area, a save icon (floppy disk) is highlighted with a red box, and a dropdown menu is open, showing options: Excel, Excel Data (highlighted with a red box), PDF, and Word. The 'Excel Data' option is the target for the user's action.

OUTCOME ENTRY & REPORTING: Homelessness

Homeless Prevention Outcome 1: Clients served will remain stably housed and maintain their housing for 3 months after receiving financial assistance

This outcome is based on the client's Exit Destination after receiving financial assistance. Clients should remain open until the designated time period has passed to conduct a follow-up assessment. Once the follow-up assessment is complete, the client should be exited from the program enrollment.

The financial assistance should be indicated as a service. Please follow directions on pages 5-6 for how to enter services.

To enter Exit Destination information:

- Go to the client page in ClientTrack
- Click on the action dropdown "(...)" to the left of your client's enrollment into your program and select 'Exit the Enrollment'

The screenshot displays the ClientTrack interface for a client named Joey Test. The client's profile information is shown at the top, including their date of birth (3/4/1988), gender (Male), client ID (7565), and contact information (561-123-7777). The client's ethnicity is listed as Hispanic/Latin(a)(o)(x) and their race as Black, African American, or African.

The main section of the interface is titled "Joey's Enrollments" and contains a table with the following columns: Enrollment, Case Members, Enroll Date, Exit Date, Case Manager, Organization, and Acuity List Detail? The table lists three enrollments:

Enrollment	Case Members	Enroll Date	Exit Date	Case Manager	Organization	Acuity List Detail?
P2P - Circles SOFI	1	04/24/2023				No
Acuity List Detail	1	09/13/2022				No
er (Services Only)	1	06/01/2022				No

An action dropdown menu is open for the "P2P - Circles SOFI" enrollment, showing various options. The option "Exit the Enrollment" is highlighted in blue at the bottom of the menu.

OUTCOME ENTRY & REPORTING: Homelessness

Clients served will remain stably housed and maintain their housing for 3 months after receiving financial assistance, Continued

To enter Exit Destination information (cont.):

- Complete the Enrollment Exit (i.e. Exit Date, Destination, Exit Reason) and press “Save”
- Complete the Universal Data Assessment, the Barriers/Special Needs Assessment, and the Income Assessment
- When complete, press “Finish” to close the workflow

The screenshot shows a web application interface for the HUD Program Exit Enrollment Exit. The left sidebar contains a navigation menu with options: Dashboard, Find Client, Intake - Self Sufficiency, COVID-19 Intake, Client Profile, Family & Contacts, Common Assessments (Domestic Violence, Barriers, Master Assessments, Employment, Education - Adult, Education - Child), and Financial. The main content area displays the client's information: Joey Test, Male, Client ID 7565, 561-123-7777. The form is titled "Enrollment Exit" and includes a "To exit the client from the Enrollment, enter the Exit Date and Destination." instruction. The form fields are: Exit Date (04/24/2023), Destination (Staying or living with family, permanent tenure), Exit Reason (Completed Program), Case Manager Assignment (Stessy Cocerez), and End Case Assignment (checked). A "Save" button is located at the bottom right.

HUD Program Exit

Enrollment Exit

To exit the client from the Enrollment, enter the Exit Date and Destination.

Exit Date: 04/24/2023

Destination: Staying or living with family, permanent tenure

Exit Reason: Completed Program

Case Manager Assignment: Stessy Cocerez

End Case Assignment: ☒

Save

OUTCOME ENTRY & REPORTING: Homelessness

Clients served will remain stably housed and maintain their housing for 3 months after receiving financial assistance, Continued

To run a report to display Exit Destination:

- Ensure you are in the correct workgroup (**HMIS User**)
- Go to the Reports page in ClientTrack
- Click on 'BNLs' from the left panel and select "HMIS Active Client List"
- Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program, Head of Household – if applicable) and press 'Report'
- When the report populates, click on the save icon to reveal a dropdown and export the report to Excel Data
- Within the report, look at the columns for Exit Destinations to identify which are considered 'Permanent'

The screenshot shows the ClientTrack interface for the 'HMIS Active Client List' report. The left sidebar contains a navigation menu with 'BNLs' expanded, showing 'HMIS Active Client List' selected. The main panel displays the report title 'HMIS Active Client - By Name List' and the report range '4/1/2023 to 4/30/2023'. Below this, report criteria are shown: 'Report Type: Active at any point', 'Active Client Filter: Report Glossary Active Client', and 'Organizations:'. A table header is visible with columns: Client ID, Client Name, SSN, Age, Gender, Race, Ethnicity, and Veteran Status. A red box highlights the save icon (a floppy disk) in the top toolbar, and another red box highlights the 'Excel Data' option in the dropdown menu that appears.

OUTCOME ENTRY & REPORTING: Behavioral Health

Individuals will improve their level of functioning on post-assessment score compared to the pre-assessment baseline score on the Recovery Capital Index assessment (RCI)

This outcome is based on the Recovery Capital Index tool. At least two (2) assessments are necessary in order to assess a change.

To complete the Recovery Capital Index:

- Go to the client page in ClientTrack
- Click on “Common Assessments” from the left pane, then click on “Behavioral Health”

The screenshot shows the ClientTrack interface for a client named Joey Test. The left sidebar contains a navigation menu with the following items: COVID-19 Intake, Client Profile, Family & Contacts, Common Assessments (highlighted with a red box), Domestic Violence, Barriers, Master Assessments, Employment, Education - Adult, Education - Child, Financial Assessments, Behavioral Health (highlighted with a red box), Universal Data, and Financial Evaluation. The main content area displays 'Joey Test's Dashboard' with the following information:

Joey Test's Information

Name:	Test, Joey	Birth Date:	3/4/1988	Age:	35
Gender:	Male	Veteran:	No		
Ethnicity:	Hispanic/Latin(a)(o)(x)	Race:	Black, African American, or African		

Joey's Enrollments

8 results found.

OUTCOME ENTRY & REPORTING: Behavioral Health

Individuals will improve their level of functioning on post-assessment score compared to the pre-assessment baseline score on the Recovery Capital Index (RCI)-Participants will improve resilience as evidenced by a 1 (one) point increase on the RCI from baseline to last recorded RCI within the fiscal year

To complete the Recovery Capital Index assessment (cont.):

- Click on “Add New”
 - Complete all the necessary fields (i.e. Program, Assessment Date, Assessment Type, Baseline or Followup, and Scores)
 - To ensure you are completing the correct assessment, please make sure to select ‘RCI’ from the Assessment Type dropdown
- For followup assessments, repeat the aforementioned steps with updated Dates, Types, Baseline or Followup, and Scores.

Behavioral Health

Program:

Assessment Date: 

Assessment Type:

Baseline Or Followup:

RCI Scores

Enter current RCI scores below.

Personal Capital Score:

Social Capital Score:

Cultural Capital Score:

RCI Total Score:

RCI Total Change:

OUTCOME ENTRY & REPORTING: Behavioral Health

Individuals will improve their level of functioning on post-assessment score compared to the pre-assessment baseline score on the Recovery Capital Index (RCI)

To run a report for the Recovery Capital Index assessments:

- Go to the Reports page in ClientTrack
- Click on 'Data Explorer' from the left panel and de-select "Only Show My Questions"
 - In the search field, type in "BH" and press enter
 - Click the stacked paper icon to the left of the report to make a copy of the 'BH Assessments and Client Demos' report; rename as you wish

- Under “Which records do you want to include?”, only adjust the dates and the Program Name; leave the rest of the setup as is.

OUTCOME ENTRY & REPORTING: Behavioral Health

To run a report for the Behavioral Health Assessments (cont.):

The screenshot shows the 'Data Explorer' interface for 'BH Assessments and Client Demos'. The left sidebar lists various report categories: HMIS Exports, HMIS Reports, Administrative Reports, Client Reports, Enrollment Reports, Referral Reports, and Service Reports. The main content area is divided into three sections:

- What interests you today?**: This section contains four dropdown menus: 'Enrollment', 'Client', 'Behavioral Health', and 'Client Assessment'.
- What do you want to know?**: This section displays a grid of 15 data fields: Created by Organization, Program, Grant, Case ID, Client ID, Enroll Date, Exit Date, Destination at Exit, Still Enrolled, Full Name, Birth Date, Gender, Race, Ethnicity, Veteran Status, Zip Code, Assessment, Assessment Date, Baseline or Follow Up, Score, Total Change, and Living Situation.
- Which records do you want to include?**: This section shows a filter builder with three conditions:
 - Program = Program Name
 - Assessment Date >= '10/01/2022'
 - Assessment Date <= '09/30/2023'Each condition has a '+' button to add more filters and a 'x' button to remove the condition. A 'Reset Filters' button is located to the right of the filter builder. At the bottom of the filter section are 'Start Over' and 'Show Me' buttons.

- After you click “Show Me”, export the resulting report to ‘Excel Data’ by clicking the download icon to the top right of the report popup

Export Data Explorer BH Assessments and Client Demos 2023-04-24 - Excel

Page Layout Formulas Data Review View Foxit PDF ACROBAT Tell me what you want to do... Stessy Cocerez Share

	C	D	E	F	M	N	O	P	Q	R	S
	Enroll Date	Exit Date	Destination at Exit	Still Enrolled	Assessment	Assessment Date	Baseline or Follow Up	Score	Total Change	Living Situation	
1	2/3/2023			Yes	BHA	1/12/2023	Baseline	24		Client doesn't know	
2	2/25/2022	5/10/2022	Data not collected	No	BHA	1/12/2023	Baseline	19			
3	2/3/2023			Yes	BHA	1/12/2023	Baseline	19			
4	1/13/2022	4/25/2022	Data not collected	No	BHA	1/11/2023	Baseline	18			
5	1/31/2023			Yes	BHA	1/11/2023	Baseline	18			
6	2/25/2022	5/10/2022	Data not collected	No	BHA	1/12/2023	Baseline	19			
7	2/3/2023			Yes	BHA	1/12/2023	Baseline	19			
8	1/13/2022	4/25/2022	Data not collected	No	BHA	1/11/2023	Baseline	18			
9	1/31/2023			Yes	BHA	1/11/2023	Baseline	18			
10	2/3/2023			Yes	BHA	1/12/2023	Baseline	24		Data not collected	
11	2/3/2023			Yes	BHA	1/12/2023	Baseline	24		Data not collected	
12	12/8/2022			Yes	BHA	12/8/2022	Baseline	20		Data not collected	
13	2/24/2023			Yes	BHA	2/22/2023	Baseline	20		Data not collected	
14	10/11/2022			Yes	BHA	10/11/2022	Baseline	27		Data not collected	
15	10/11/2022			Yes	BHA	10/11/2022	Baseline	14		Data not collected	
16	10/11/2022			Yes	BHA	10/11/2022	Baseline	14		Data not collected	
17	12/7/2022			Yes	BHA	12/7/2022	Baseline	25		Data not collected	
18	12/8/2022			Yes	BHA	12/8/2022	Baseline	20			
19	2/6/2023			Yes	BHA	1/12/2023	Baseline	23			
20	1/24/2023			Yes	BHA	1/12/2023	Baseline	23			
21	1/13/2022	4/25/2022	Data not collected	No	BHA	1/11/2023	Baseline	18		Data not collected	
22	1/31/2023			Yes	BHA	1/11/2023	Baseline	18		Data not collected	
23	2/28/2023			Yes	BHA	10/11/2022	Baseline	11		Data not collected	
24	1/25/2023			Yes	BHA	1/17/2023	Baseline	19		Data not collected	
25	3/2/2023			Yes	BHA	10/20/2022	Baseline	31		Data not collected	
26	10/11/2022			Yes	BHA	10/11/2022	Baseline	27			
27	2/3/2023			Yes	BHA	1/12/2023	Baseline	24		Data not collected	
28	2/3/2023			Yes	BHA	1/12/2023	Baseline	11		Data not collected	
29	2/3/2023			Yes	BHA	1/12/2023	Baseline	24		Data not collected	
30	2/3/2023			Yes	BHA	1/12/2023	Baseline	24		Data not collected	

Read 81%

OUTCOME ENTRY & REPORTING: Behavioral Health

Individuals will improve their level of functioning score as measured by a decrease score of at least 1 point on the RCI from their baseline score at admission within the fiscal year

This outcome is based on the RCI assessment tool. At least two (2) assessments are necessary in order to assess a change.

To complete the RCI assessment:

- Go to the client page in ClientTrack
- Click on “Common Assessments” from the left pane, then click on “Behavioral Health”

The screenshot displays the ClientTrack interface for a client named Joey Test. The left sidebar contains a navigation menu with the following items: COVID-19 Intake, Client Profile, Family & Contacts, Common Assessments (highlighted with a red box), Domestic Violence, Barriers, Master Assessments, Employment, Education - Adult, Education - Child, Financial Assessments, Behavioral Health (highlighted with a red box), Universal Data, and Financial Evaluation. The main content area shows the client's dashboard with the following information:

Joey Test's Dashboard

Joey Test, Male, Client ID 7565, 561-123-7777, 3/4/1988

Joey Test's Information

Name:	Test, Joey	Birth Date:	3/4/1988	Age:	35
Gender:	Male	Veteran:	No		
Ethnicity:	Hispanic/Latin(a)(o)(x)	Race:	Black, African American, or African		

Joey's Enrollments

8 results found.

OUTCOME ENTRY & REPORTING: Behavioral Health

Participants will improve resilience as evidenced by a 1 (one) point increase on the RCI from baseline to last recorded RCI within the fiscal year.

This outcome is based on services (*see section on how to enter services*) (pg 66). The outcome is a proxy measured from the referral/supportive services entered into the database.

To run a Service Summary report:

- Go to the Reports page in CT
- Select 'Service Reports'
- Select 'Service Summary'

- Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program) and press 'Report'

OUTCOME ENTRY & REPORTING: Strategic Partnerships

Individuals will receive a bus ticket to return home to their family and will not reenter the Palm Beach County Homeless system within 30 days

This outcome is based on services (see section on how to enter services). The outcome is a proxy measured from the transportation services entered into the database. The transportation service should be entered when issued and a follow-up service indicating whether they are Stably Housed or Not Stably Housed should be inputted when the follow-up is conducted.

Due to the nature of this outcome, the client should also be exited from ClientTrack once the follow-up is complete.

The screenshot displays the 'Service Summary Report' interface. On the left sidebar, the 'Service Reports' menu is expanded, and 'Service Summary' is selected. The main form contains the following sections:

- Date Range:** A dropdown menu is set to 'Current Month'. Below it, a date range is specified: 'Service Date Between: * 04/01/2023 and 04/30/2023'.
- Organization(s):** A list of organizations is shown, including 'Adopt-A-Family of the Palm Beaches, Inc.', 'American Association of Caregiving Youth', 'Boys Town South Florida', and 'Center for Child Counseling'. A checkbox is present next to the list.
- Program(s):** A section with a checkbox labeled 'Filter by Program(s)' which is currently checked.

At the bottom right of the form, there are three buttons: 'Report' (highlighted with a red box), 'Schedule Report', and 'Cancel'.

To enter Exit Destination information:

- Go to the client page in ClientTrack
- Click on the action dropdown “(...)” to the left of your client’s enrollment into your program and select ‘Exit the Enrollment’

OUTCOME ENTRY & REPORTING: Strategic Partnerships

Individuals will receive a bus ticket to return home to their family and will not reenter the Palm Beach County Homeless system within 30 days

To enter Exit Destination information (cont.):

- Complete the Enrollment Exit (i.e. Exit Date, Destination, Exit Reason) and press “Save”

The screenshot displays the ClientTrack interface for a client named Joey Test. The client's profile information includes: Name: Joey Test, DOB: 3/4/1988, Gender: Male, Client ID: 7565, Phone: 561-123-7777, Ethnicity: Hispanic/Latin(a)(o)(s), and Race: Black, African American, or African. The 'Enrollments' section shows a table of the client's enrollment history.

Enrollment	Case Members	Enroll Date	Exit Date	Case Manager	Organization	Acuity List Detail?
Current						
P2P - Circles SOFI	1	04/24/2023		Stessy Cocerez	Pathways to Prosperity	No
Acuity List Detail	1	09/15/2022		Randy Paul	Palm Beach County BCC - Lead	No
ter (Services Only)	1	06/01/2022		Kelanna Pierre Louis	Palm Beach County BCC - Lead	No

The 'Exit the Enrollment' action is highlighted in the bottom left corner of the enrollment table.

- Complete the Universal Data Assessment, the Barriers/Special Needs Assessment, and the Income Assessment
- When complete, press “Finish” to close the workflow

OUTCOME ENTRY & REPORTING: Strategic Partnerships

Individuals will receive a bus ticket to return home to their family and will not reenter the Palm Beach County Homeless system within 30 days

To run a Service Summary report:

- Go to the Reports page in CT

The screenshot shows a web application interface for managing client data. The left sidebar contains navigation links: Dashboard, Find Client, Intake - Self Sufficiency, COVID-19 Intake, Client Profile, Family & Contacts, Common Assessments (Domestic Violence, Barriers, Master Assessments, Employment, Education - Adult, Education - Child), and Financial. The main content area is titled 'HUD Program Exit' and 'Enrollment Exit'. It displays client information: Joey Test, 3/4/1988, Male, Client ID 7565, 561-123-7777. The form includes a 'Pause' button and a 'Cancel' button. The 'Exit Enrollment' section has a 'To exit the client from the Enrollment, enter the Exit Date and Destination.' instruction. The form fields are: Exit Date (04/24/2023), Destination (Staying or living with family, permanent tenure), Exit Reason (Completed Program), Case Manager Assignment (Stessy Cocerez), and End Case Assignment (checked). A 'Save' button is at the bottom right.

- Select 'Service Reports'
- Select 'Service Summary'
- Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program) and press 'Report'

ENTERING OUTCOME ACHIEVEMENTS in HMIS/CMIS

Service Summary Report

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

Service Date Between: 04/01/2023 and 04/30/2023

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.

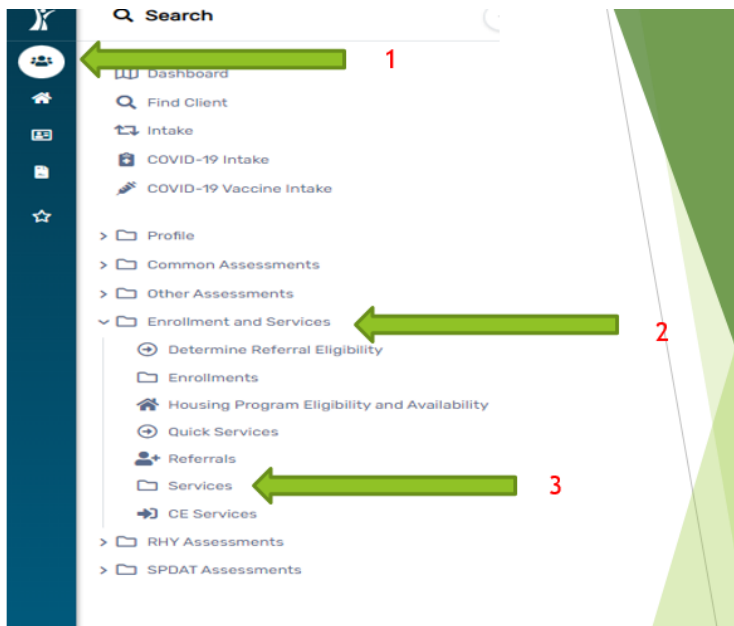
Organization(s): Adopt-A-Family of the Palm Beaches, Inc.
American Association of Caregiving Youth
Boys Town South Florida
Center for Child Counseling
Center for Family Services of Dade, Inc.

Program(s)
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 selecting each program separately, or click the icon to select all.

Program(s): ☒ Filter by Program(s)

Report **Schedule Report** **Cancel**

1. Click on Client Dashboard
2. Click on “Enrollment and Services”
3. Click on “Services”



1. Click on Client Dashboard
2. Click on “Enrollment and Services”
3. Click on “Services”



6. Add Enrollment, Grant, Services

- Follow Up Service (Stably
Housed, Unstably Housed)

6

Family Income:

No Recent Income	
Family Members	3
Poverty Level	\$2,151.67

Enrollment: * -- SELECT --

Grant: AAF - FAA Rapid Rehousing

Service: * Stably Housed

Date: * 11/05/2024

Units Of Measure: * ☐ Dollars ☐ Minutes ☒ Count ☐ Hours

Units: * 1.00

Unit Value: * \$0.00

Total: \$0.00

User Performing the Service: Joanna Reid

Comments:

Restriction: * ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

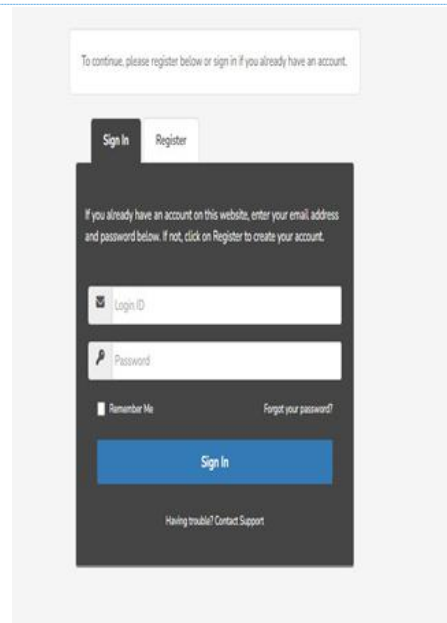
Accessing SAMIS for Quarter Reports

Access link

- The Quarter Report can be accessed in SAMIS using the link: <https://lxm.cc/5jhnw0>
- If you do not have a SAMIS account, please contact Ataylor3@pbc.gov .

Steps

1. Select the “Sign In” tab.
2. Enter your SAMIS Login ID.
3. Enter your SAMIS Password.
4. Select the blue “Sign In” button.



Commented [PC1]: We need to get clearer pics

5. In the Attach File(s) field, select the grey “Choose File” button and select all of the documents you wish to upload (including but not limited to the Quarterly Outcome Report and Client Level Data).
6. Enter the date on which this report is being filled out.
7. Select the Agency for which you are reporting.
8. Select the Program within the Agency for which you are reporting.
9. Select the Service Category related to the Program within the Agency for which you are reporting.
10. The Fiscal Year will be automatically filled in depending on when the report is being filled out

Palm Beach County - RMA Quarterly Outcome Report

Please upload a copy of:

- Quarterly Outcome Report
- Client level data
- All related documentation

PLEASE SUBMIT ALL DOCUMENTS IN EXCEL, XLS, OR XLSX FORMAT

Attach File(s) * Choose File 5

Sample Client Level Data.xlsx See 103 to 107%

Sample Quarterly Outcome R... See 103 to 107%

Sample Related Documentat... See 103 to 107%

Sample Related Documentat... See 103 to 107%

Program Details

Date Submitted * 6

Agency * 7

Program Name * ☒ **PSH** 8

Service Category * ☒ **Homelessness** 9

Fiscal Year * 10

Reporting Period * ☐ Quarter 1 ☐ Quarter 2 ☐ Quarter 3

11. Select the Fiscal Quarter of which you would like to report on.
 - a. Quarter 1 – October 1st – December 31st
 - b. Quarter 2 – January 1st – March 31st
 - c. Quarter 3 – April 1st – June 30th
 - d. Quarter 4 – July 1st – September 30th
12. Based on your Program's Outcome, enter if Outcome #1 was met.
13. If "Yes" was selected previously, you may move on. If "No" was selected, please explain why not as thoroughly as possible.
14. Repeat Step 12, but for Outcome #2. If your program does not have an Outcome #2, select Not Applicable (N/A)
15. Repeat Step 13, but for Outcome #2. If "Not Applicable (N/A)" was selected previously, you may move on.
16. Repeat Step 12, but for Outcome #3. If your program does not have an Outcome #3, select Not Applicable (N/A)
17. Repeat Step 13, but for Outcome #3. If "Not Applicable (N/A)" was selected previously, you may move on.

Reporting Period * ☒ Quarter 1

☐ Quarter 2

☐ Quarter 3

☐ Quarter 4

Was Outcome #1 Met during the Quarter? * ☒ Yes

☐ No

Please explain why Outcome #1 was not met during the Quarter * N/A

Was Outcome #2 Met during the Quarter? * ☐ Yes

☒ No

☐ Not Applicable (N/A)

Please explain why Outcome #2 was not met during the Quarter * *Reason(s) why the Outcome in question was not met*

Was Outcome #3 Met during the Quarter? * ☐ Yes

☐ No

☒ Not Applicable (N/A)

Please explain why Outcome #3 was not met during the Quarter * N/A

Share a Success Story during the Quarter *

Completed By (phone) *

Save & Submit Cancel

18. Share a Success story, relevant to your Agency and the desired Outcome(s). This Success Story may be shared in our Annual Community Investment Portfolio.
19. Enter your Full First and Last Name. This, along with your Email, will be used to contact you in the case of any questions as well as to notify when the report has been fully processed.
20. Enter your Signature. This can be done directly on the virtual Signature Pad, using a mobile device, and/or external Signature Pad. Once entered, the signature can be saved for future use.
21. Select the blue “Save & Submit” button to submit your report to Community Services Staff for processing.

NOTE: If any required fields are not filled out before submitting, an error will appear in red, displaying what was missed and preventing the document from being submitted.

Please explain why Outcome #2 was not met during the Quarter *

Reason(s) why the Outcome in question was not met

Was Outcome #3 Met during the Quarter? *

☐ Yes

☐ No

☒ Not Applicable (N/A)

Please explain why Outcome #3 was not met during the Quarter *

N/A

Share a Success Story during the Quarter *

Success Story due to Agency action relating to the given Outcome(s) 18

Completed By (Print) *

All Taylor 19

Completed By (Sign) *

20

Contact Information

Email *

ATaylor3@jphc.gov 21

22 Save & Submit Cancel

NOTE: This section is for Palm Beach County – Community Services Department Staff ONLY. Please disregard.

Contact Information

Email  ATaylor3@pbc.gov

Palm Beach County – Community Services Staff ONLY

Number of Unduplicated Clients served YTD Client(s) 

Projected Number of Unduplicated Clients served YTD Client(s) 

Current Percentage of Attainment YTD % 

Is Outcome 1 YTD Attainment on track for the Fiscal Year? ☐ Yes ☐ No ☐ Not Applicable (N/A) 

Is Outcome 2 YTD Attainment on track for the Fiscal Year? ☐ Yes ☐ No ☐ Not Applicable (N/A) 

Is Outcome 3 YTD Attainment on track for the Fiscal Year? ☐ Yes ☐ No ☐ Not Applicable (N/A) 

[Save & Submit](#) [Cancel](#)

CQM

CQM Projects will follow the Plan-Do-Study-Act (PDSA) cycle, which is a systematic process for gaining valuable learning and knowledge for the continual improvement of a product, process, or service. The cycle begins with the Plan step.

This involves identifying a goal or purpose, formulating a theory, defining success metrics and putting a plan into action. These activities are followed by the Do step, in which the components of the plan are implemented, such as making a product.

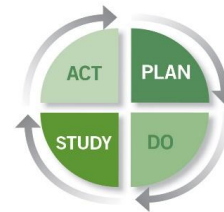
Next comes the Study step, where outcomes are monitored to test the validity of the plan for signs of progress and success, or problems and areas for improvement.

The Act step closes the cycle, integrating the learning generated by the entire process, which can be used to adjust the goal, change methods, reformulate a theory altogether, or broaden the learning – improvement cycle from a small-scale experiment to a larger implementation Plan.

These four steps can be repeated over and over as part of a never-ending cycle of continual learning and improvement (definitions come from the Deming Institute). Training and templates for projects will be provided by CSD staff.

<http://www.think.edu.au/about-us/think-quality-assurance-framework>

Projects will be completed using the PDSA template provided by CSD and quarterly updates will be submitted using the “Do” section of the template. Projects for FY26 will be focused on improving a program outcome, increasing the number of clients served, or other topic if approved by a CSD SPRE Team member.



Quarterly Report Submission Time Plan

Please note that Quarter Reports and their supplemental data reports are due by the following dates within the fiscal year:

Quarter 1	January 15 th
Quarter 2	April 15 th
Quarter 3	July 15 th
Quarter 4	October 15 th

NOTE: If the 15th falls on a weekend or a holiday, the due date will be the following business day.

End of FY Data Verification

AGENCY shall complete a Data Verification Form by the deadline provided after the end of the contract year. The process will be initiated by the SPRE Team with the form already partially filled out by CSD SPRE staff. The partially completed form will be sent via SAMIS to the agency to both confirm the client and outcome data entered by SPRE is correct, as well as to fill in the starred entries needing to be filled out by the agency (questions 7,8,9 on the form). The Data Verification Form certifies that the data provided is final and can be published in the FAA annual report. The Data Verification Form must be signed by both the agency's data liaison and the agency Executive Director. The agency will also send back to CSD via SAMIS.

Contacts

The Strategic Planning, Research, and Evaluation (SPRE) Team is tasked with collecting Outcome Quarter Reports and the supplemental data reports (to verify the numbers reported on the report and to ensure data entry into the assigned database is being done accurately). Each Strategic Planning and Performance Analyst II has been assigned a set group of programs to oversee in regards to the Quarter Reports. Feel free to reach out to your assigned SPRE member for any technical assistance as well.

To discuss Program Outcome & CQM Reports:

- Economic Stability/Mobility: Angela Cruz ACruz1@pbc.gov
- Housing & Homelessness: Dr. Poulomy Chakraborty Pchak@pbc.gov
- Behavioral Health & Substance Use: Latoya Newby Lnewby@pbc.gov
- IDD and Seniors: Adam Reback Areback@pbc.gov
- For other questions: Dr. Joanna Reid-Enoise Jreid2@pbc.gov

To submit Utilization reports:

Please submit Quarterly Utilization reports to the CSD-Contracts Manager email (CSD-ContactsManager@pbcgov.org).