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*

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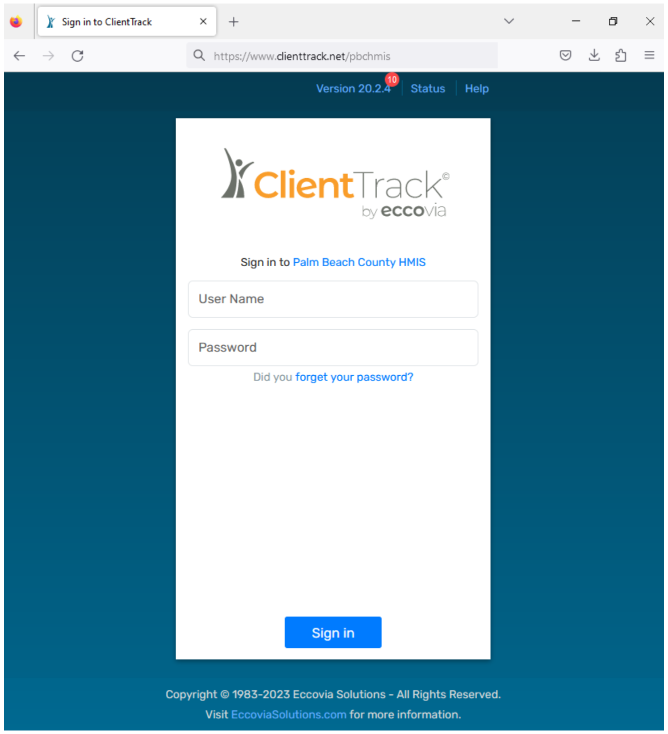
LOG IN

- 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.

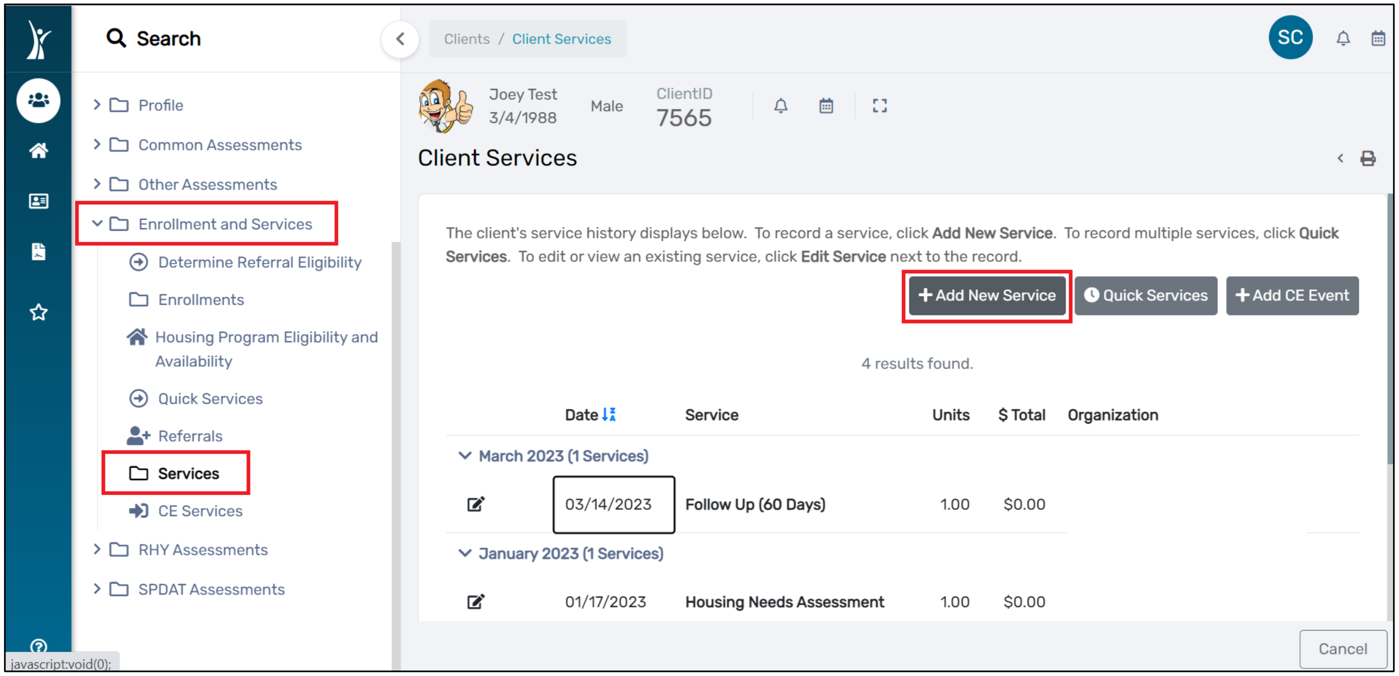
When providing the supplemental data reports, please certify that you have done the following:

- 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.

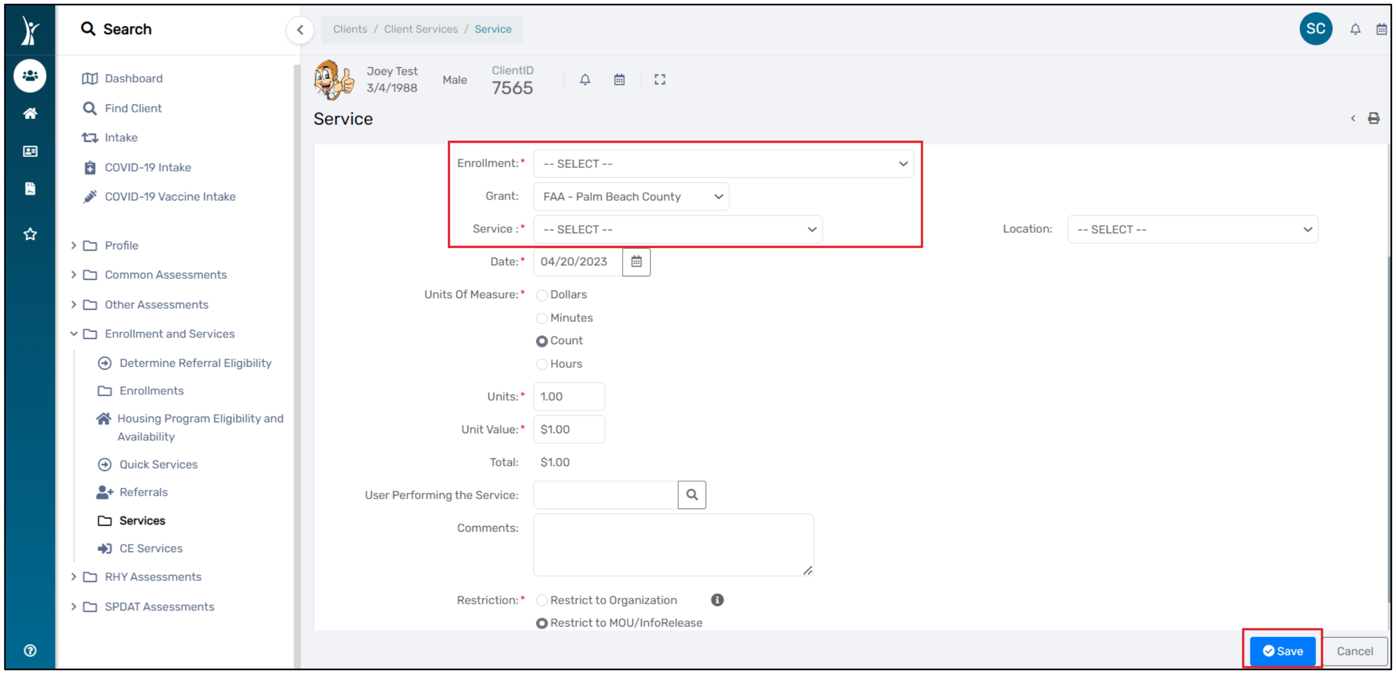
ENTERING SERVICES

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



- 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.

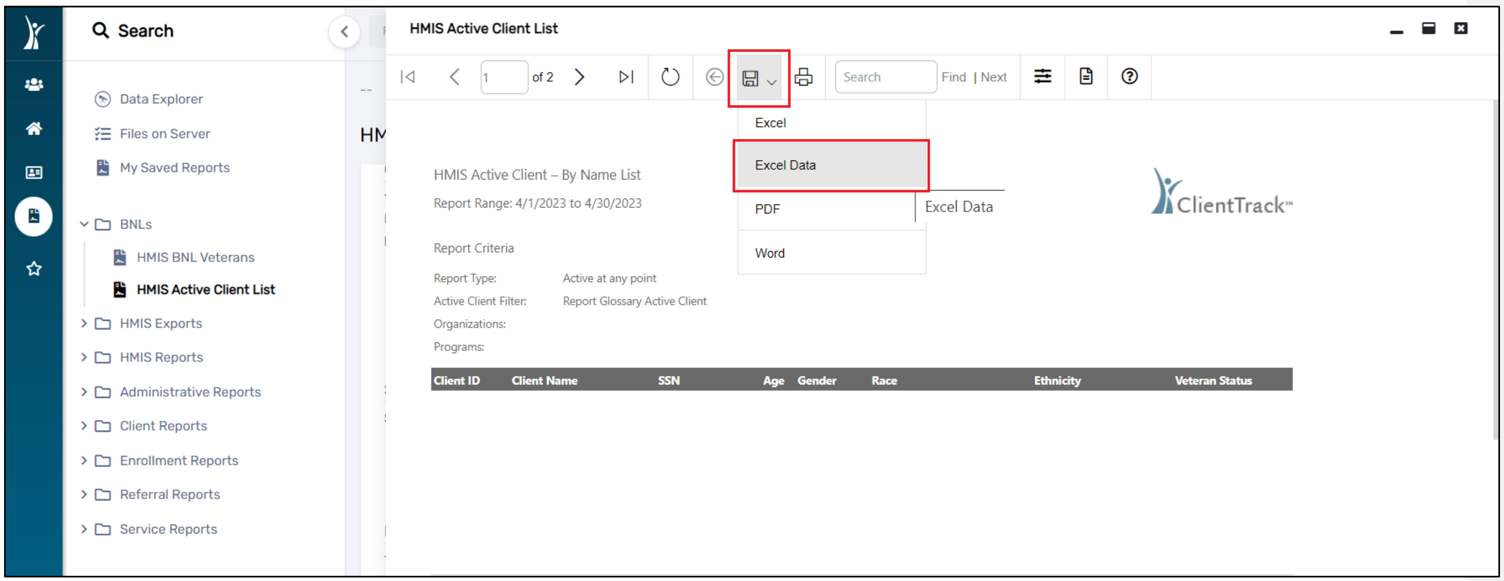


DEMOGRAPHICS REPORT

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



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

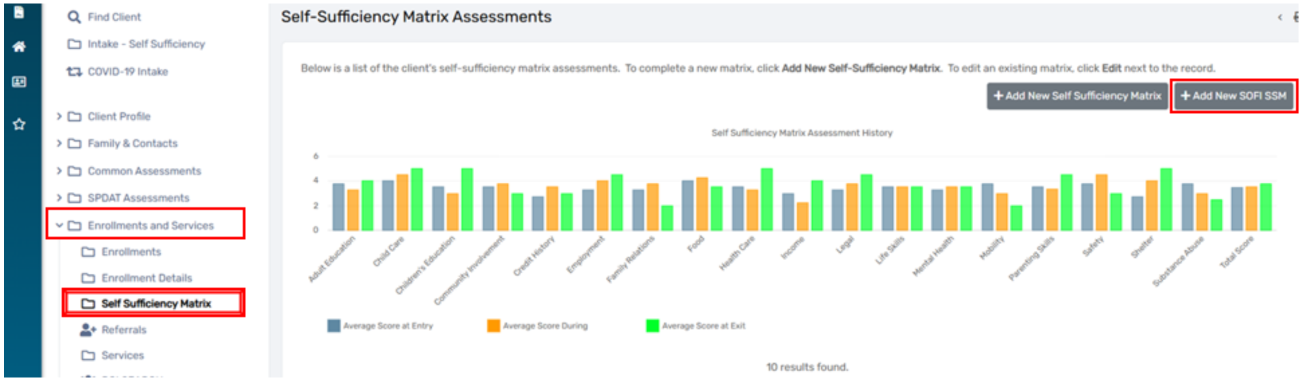
OUTCOME ENTRY & REPORTING: Economic Mobility- Self Sufficiency and Securing Our Future Initiative (SOFI)

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'

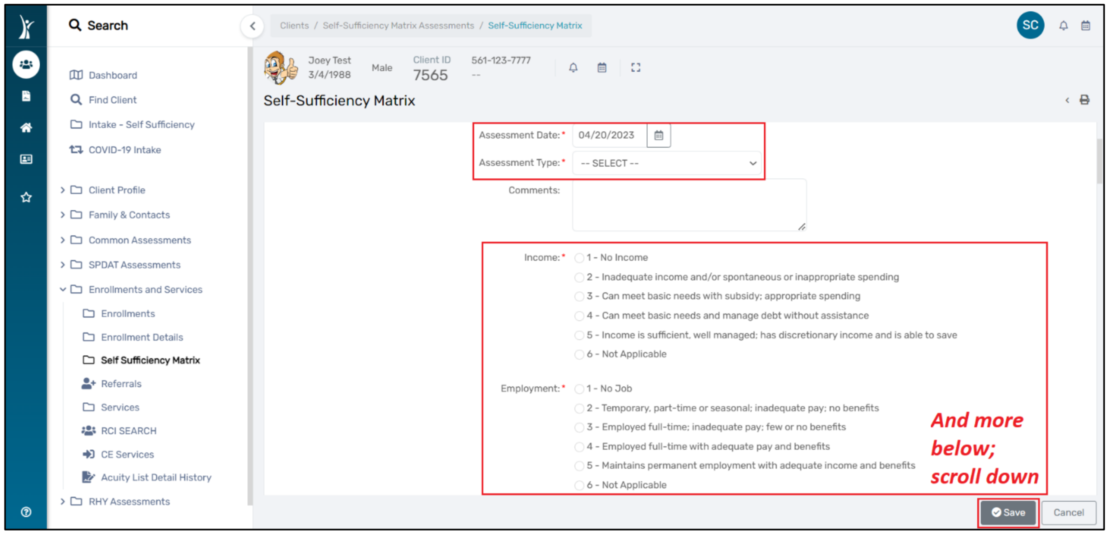


To enter a Self-Sufficiency Matrix for **SOFI** assessment (continued.):

- 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



➢

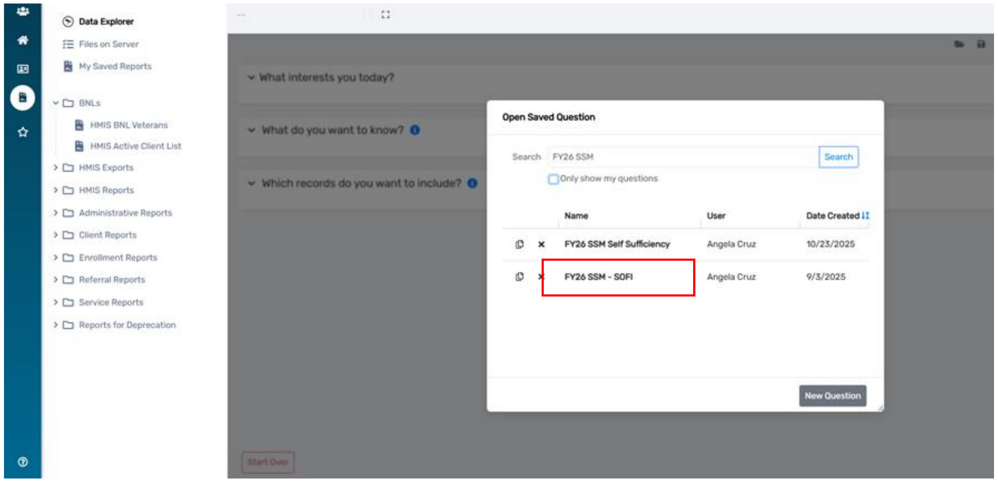
OUTCOME ENTRY & REPORTING: Economic Mobility

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:

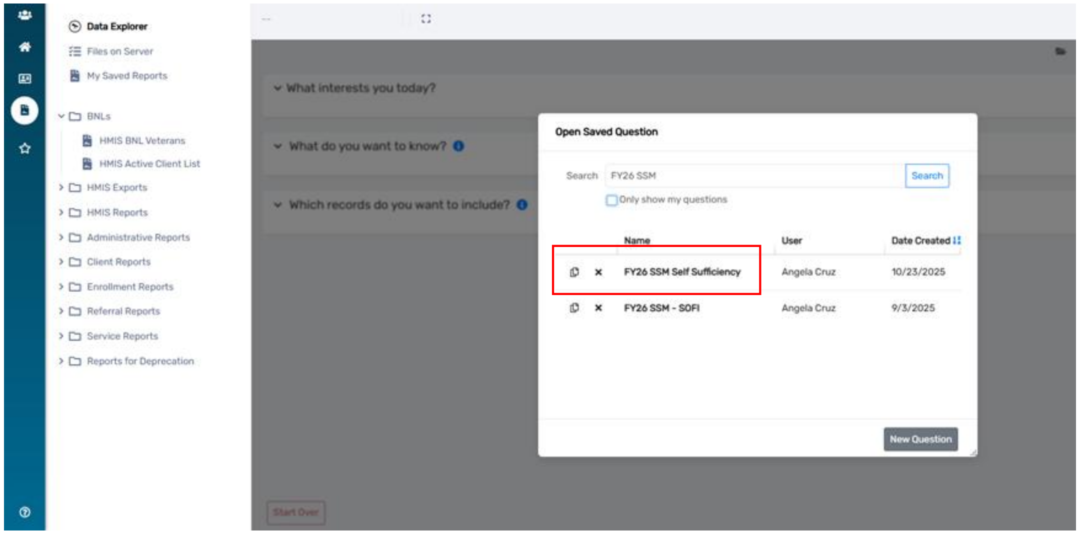
- Make sure you use (HMIS User) workgroup then Go to the Reports page in CT
    - Select ‘Data Explorer’
  - In the popup, deselect the option to “Only show my questions” and type in “FY26 SSM - SOFI”

- 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'


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
FY26 SSM Self Sufficiency
Angela Cruz
10/23/2025
FY26 SSM - SOFI
Angela Cruz
9/3/2025
New Question
Start Over

OUTCOME ENTRY & REPORTING: Economic Mobility - Income

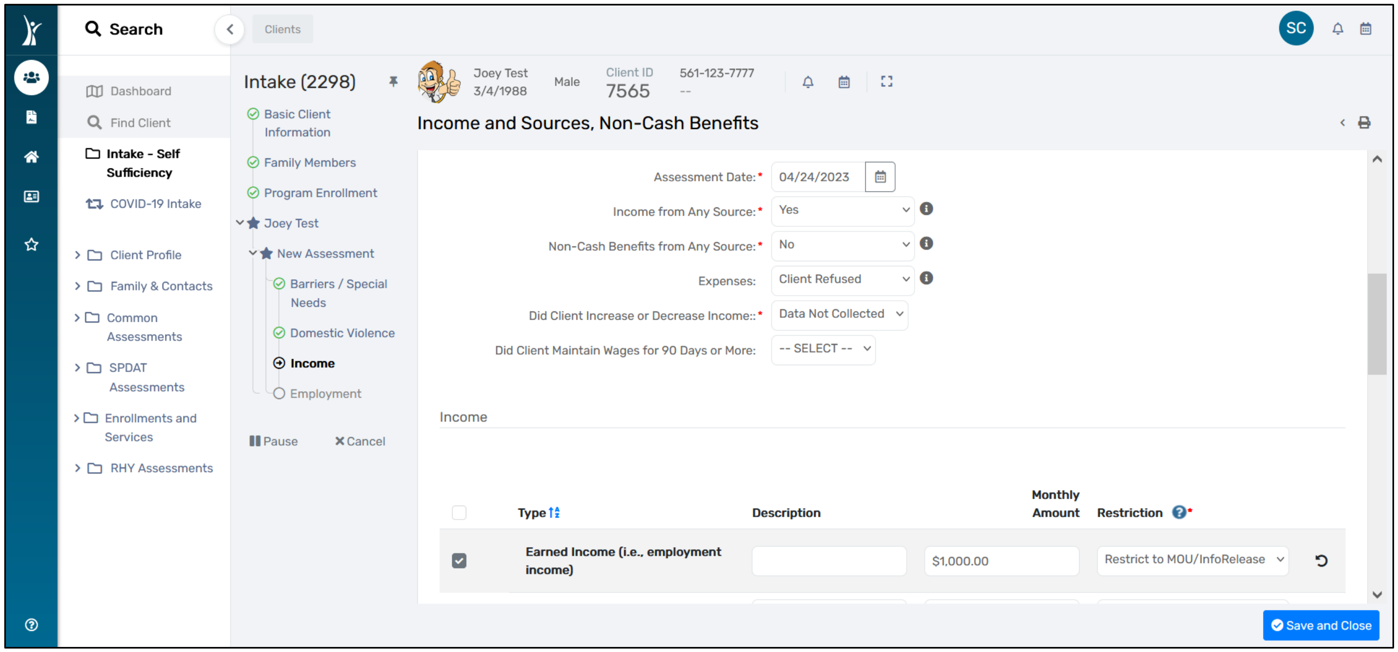
Clients will increase their household income as evidence on the financial assessment at program entry and exit.

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:

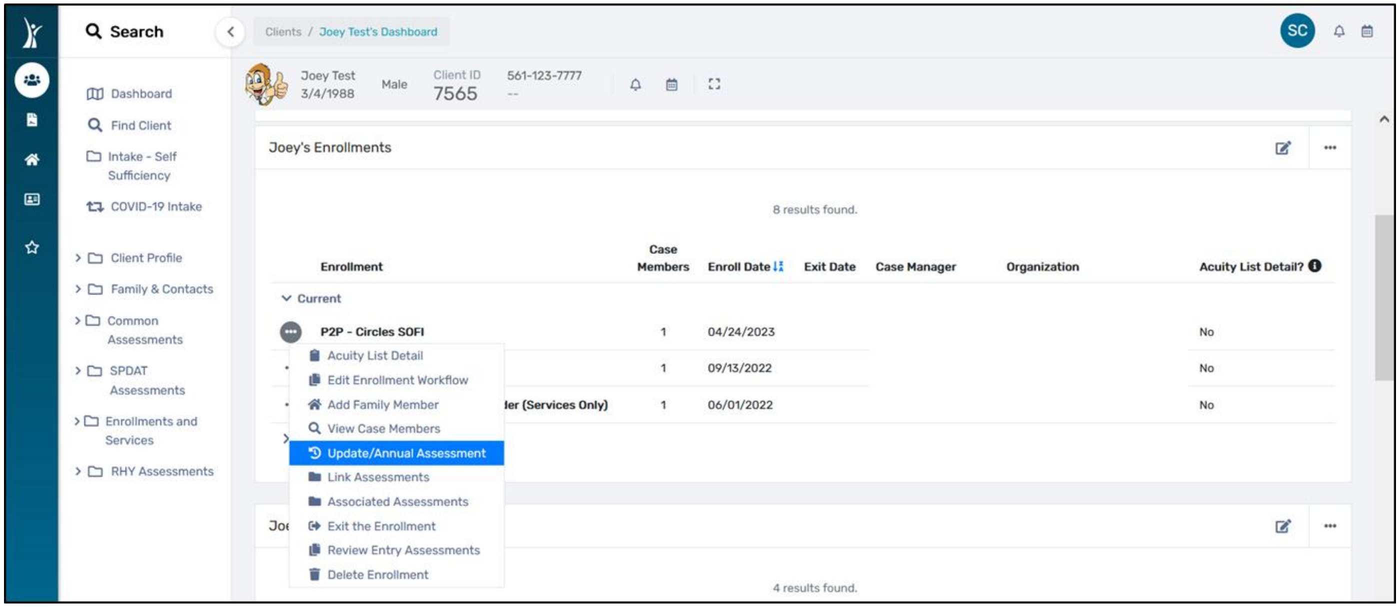


<u>OUTCOME ENTRY & REPORTING: Economic Mobility – Income (cont.)</u>

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'.



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

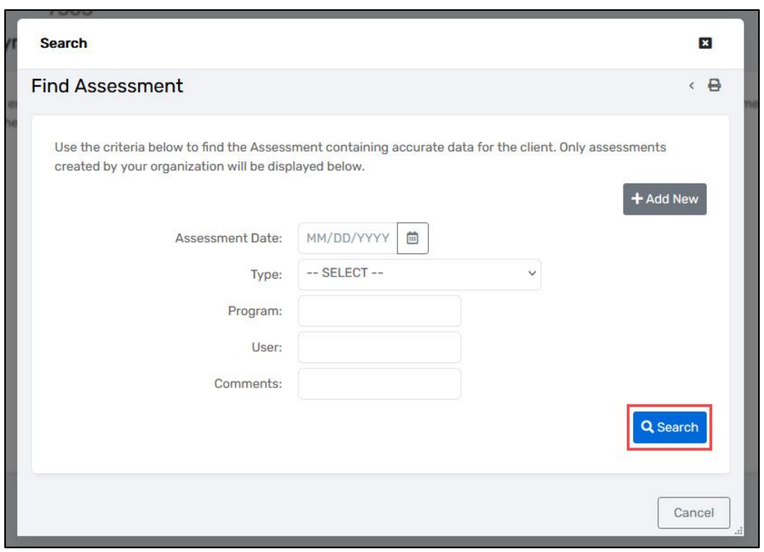
You must **first** have completed an updated assessment to link to your employment assessment see page 18 and do that first.

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

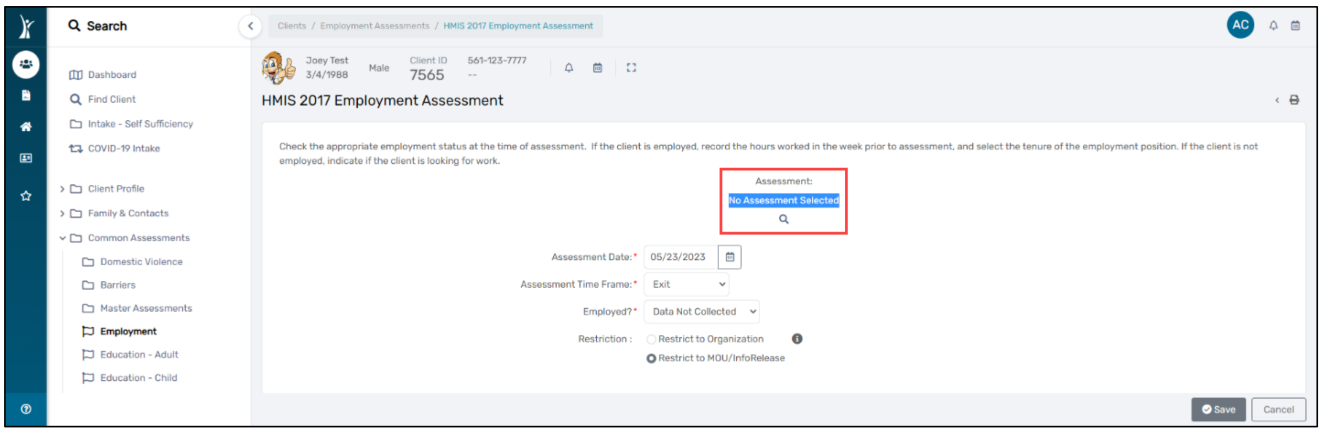
OUTCOME ENTRY & REPORTING: Economic Mobility

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.*

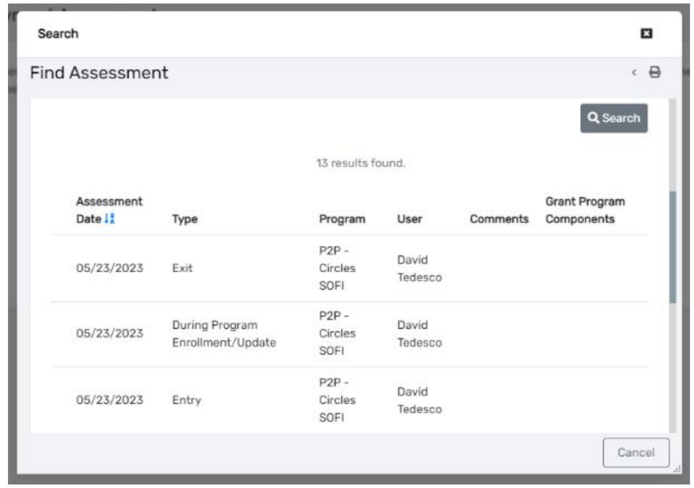


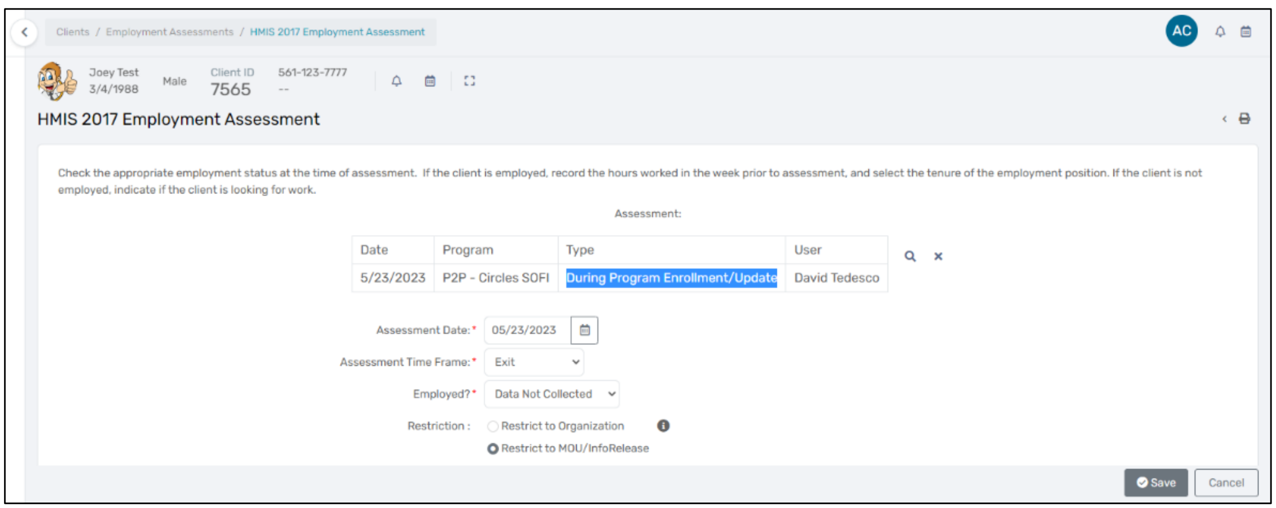
OUTCOME ENTRY & REPORTING: Economic Mobility

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.

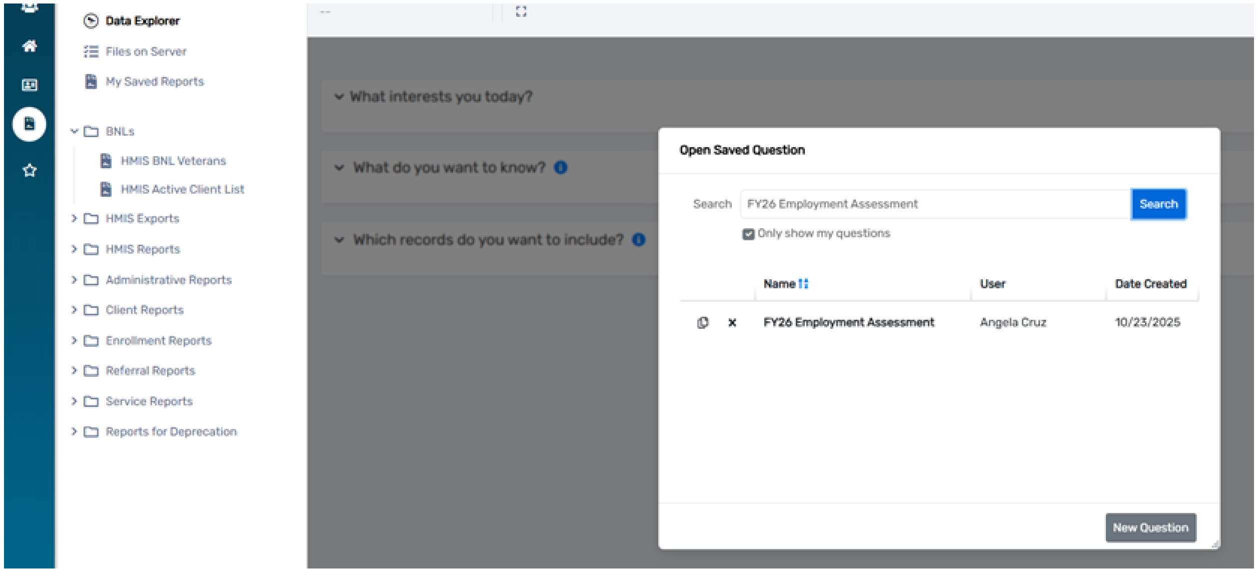




OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

To run an Employment Assessment report:

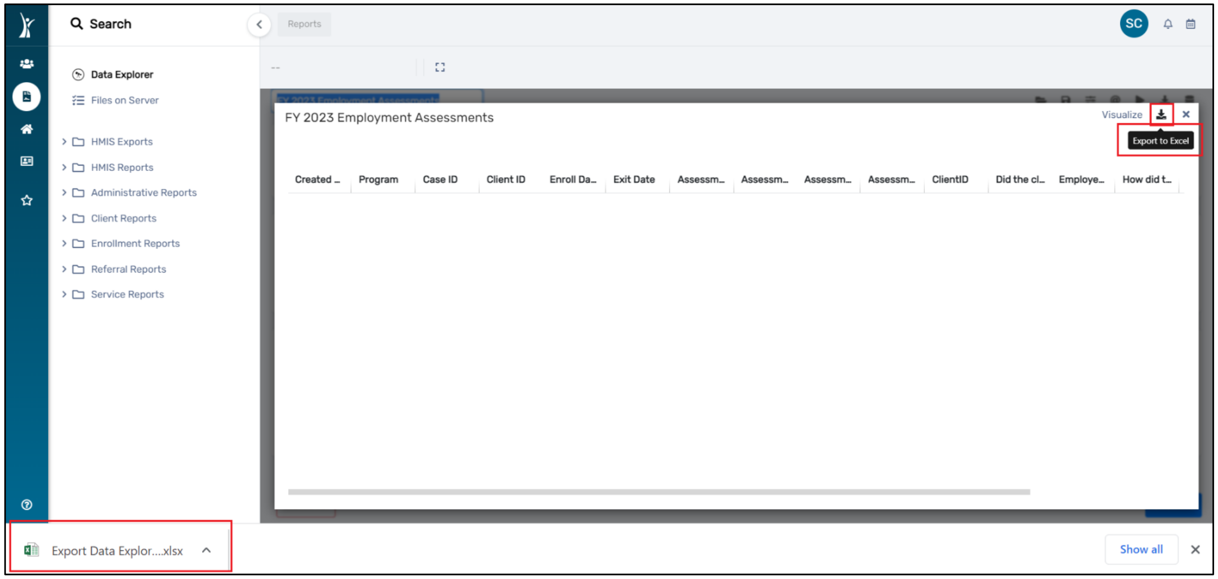
- Go to the Reports page in CT
- Select 'Data Explorer'
- In the popup, deselect the option to "Only show my questions" and type in "FY26 Employment Assessment"
    - Look for the report created by Angela Cruz on 10/23/2025 and click on the double paper icon to the left of the question in order to copy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

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

<table>
<tr><th colspan="2">Potential Services</th><th>Required Outcomes</th></tr>
<tr><td>i.</td><td>Emergency Financial Assistance (Rental Assistance, Utility Assistance, Childcare Assistance, Transportation Voucher Assistance)</td><td>% of eligible clients will have their crisis resolved through emergency financial assistance up to 45 days from completed intake.</td></tr>
<tr><td>ii.</td><td>Safety Net Navigation & Linkage Services (SNAP Application Assistance, Medicaid Application Assistance, Unemployment Application Assistance)</td><td>% 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.</td></tr>
<tr><td>iii.</td><td>Case Management</td><td>% of individuals will achieve at least two (2) objectives on the Individualized Implementation Plan within the fiscal year.</td></tr>
<tr><td>iv.</td><td>Supported Employment Services/Career Planning/center-based employment training</td><td>% 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</td></tr>
<tr><td>v.</td><td>Life Skills (Financial Literacy/Computer Skills Training/ Employment Skills Training)</td><td rowspan="5">% of individuals will achieve at least two (2) objectives on the Individualized Implementation Plan within the fiscal year.</td></tr>
<tr><td>vi.</td><td>Day Programming</td></tr>
<tr><td>vii.</td><td>Supported Living Services</td></tr>
<tr><td>viii.</td><td>Retirement Services</td></tr>
<tr><td>ix.</td><td>Respite for Caregivers</td></tr>
</table>

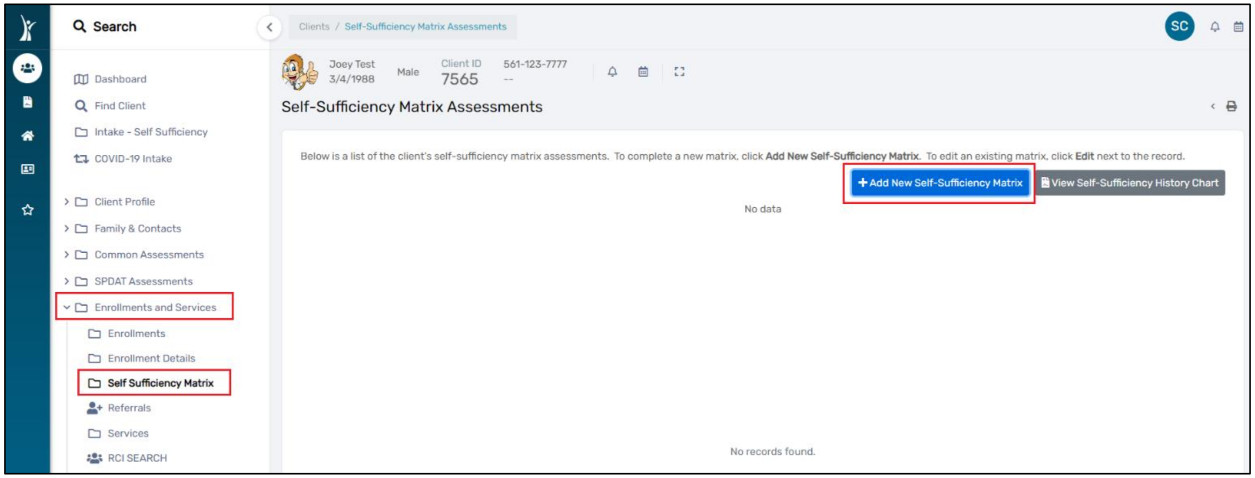
Outcome based on Self-Sufficiency Matrix

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.

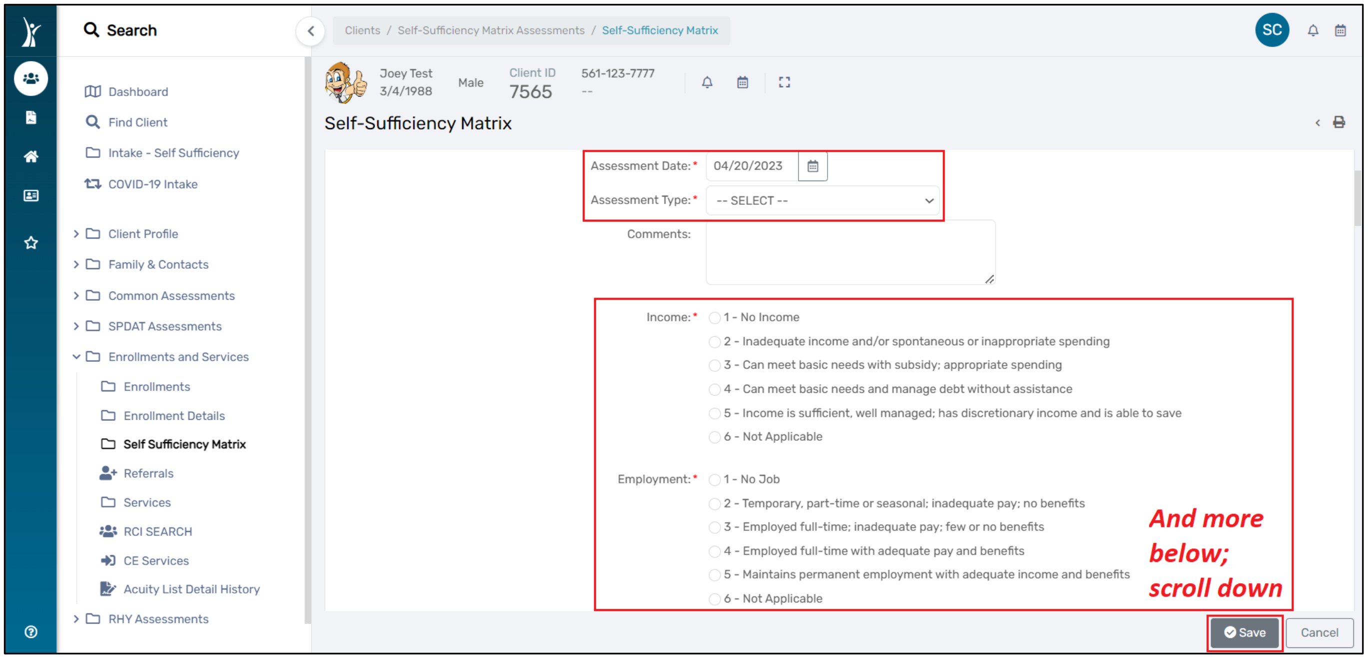
To enter a Self-Sufficiency Matrix assessment

- 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'



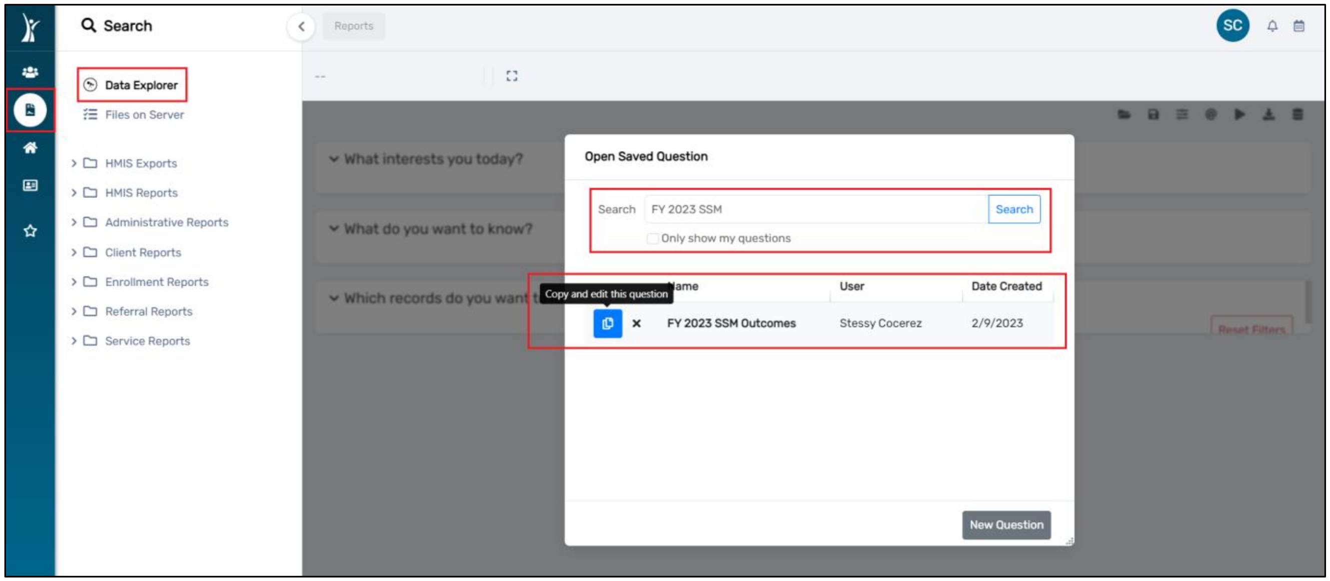
- Enter the correct date for the assessment
- Select 'Assessment Type' (Entry for 1st, "Update" for all quarters after, Exit when leaving program)
- You can enter any comments that you feel are relevant

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



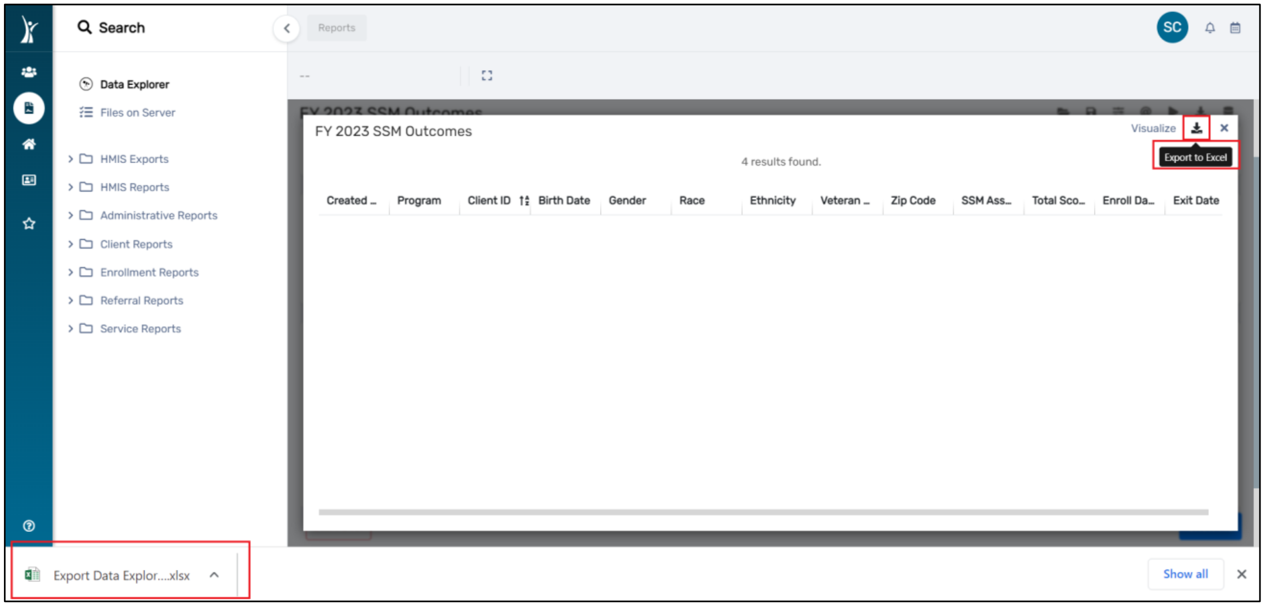
To run a Self-Sufficiency Matrix (SSM) report

- 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



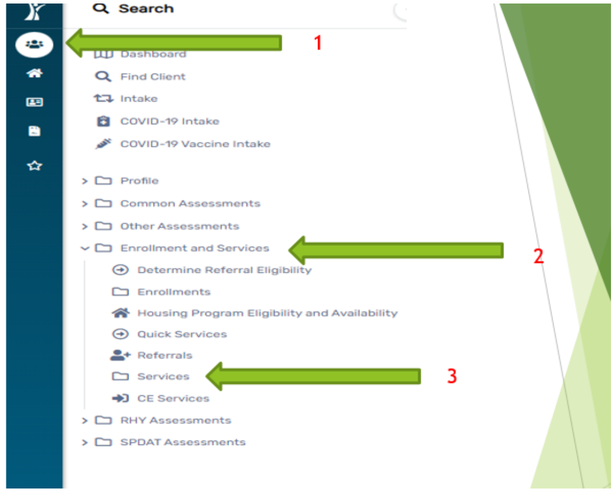
For all other required outcomes

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

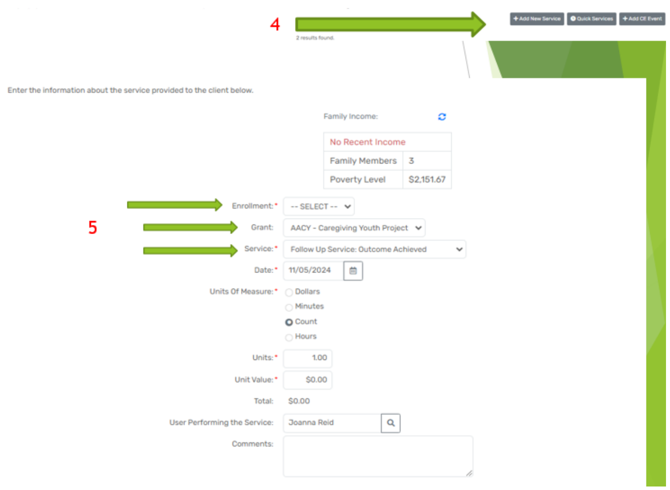
1. Click on Client Dashboard
2. Click on “Enrollment and Services”
3. Click on “Services”



4. Click on “Add New Service”

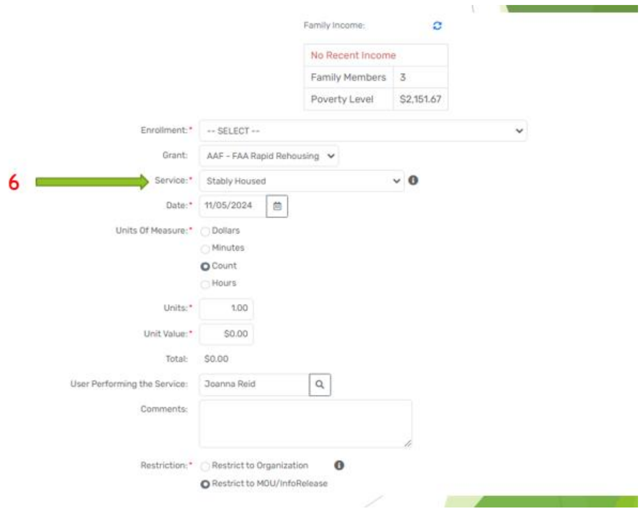
5. Add Enrollment, Grant, Services

- Follow Up Service (Outcome Achieved, Not Achieved)



6. Add Enrollment, Grant, Services

- Follow Up Service (Stably Housed, Unstably Housed)



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’.

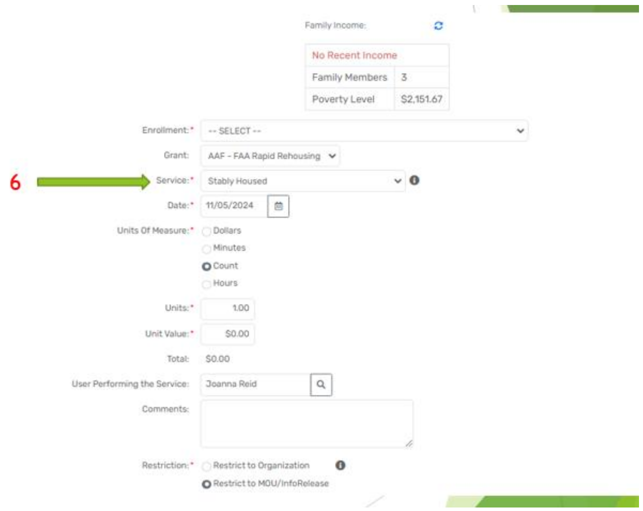
To run a Service Summary Report: To record outcome achievement

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)



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.

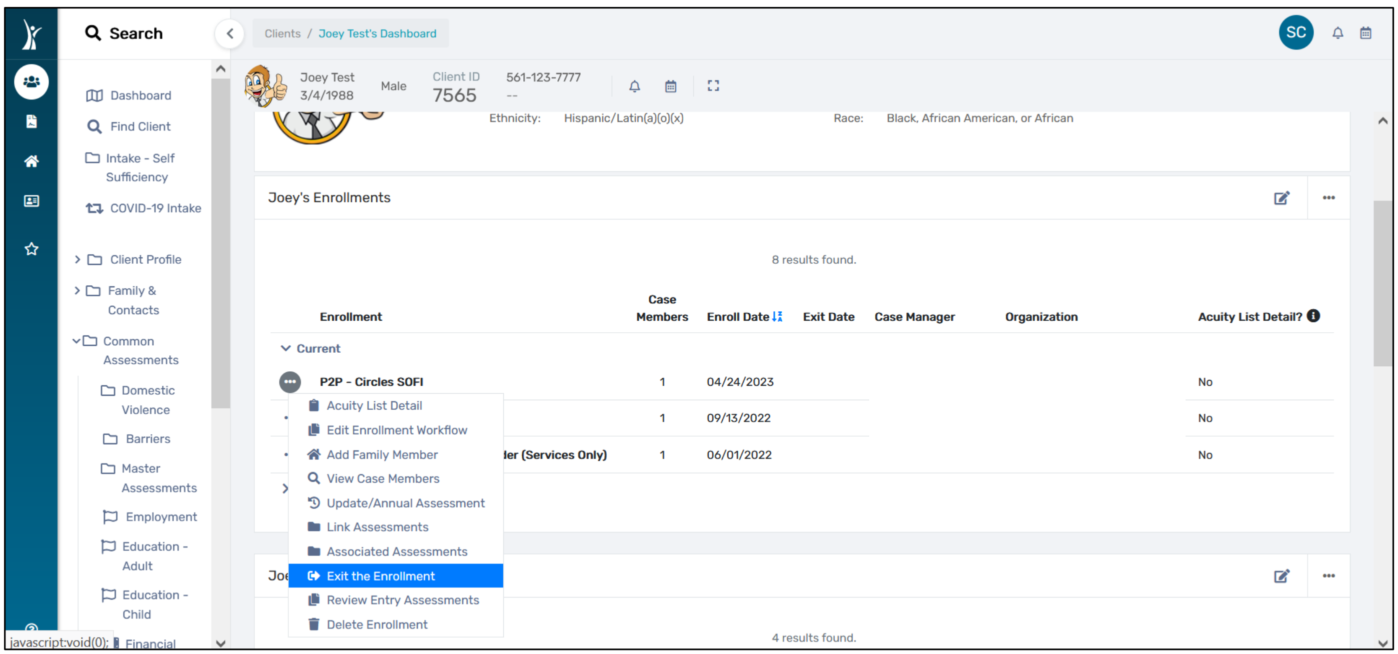
OUTCOME ENTRY & REPORTING: Homelessness

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'



OUTCOME ENTRY & REPORTING: Homelessness

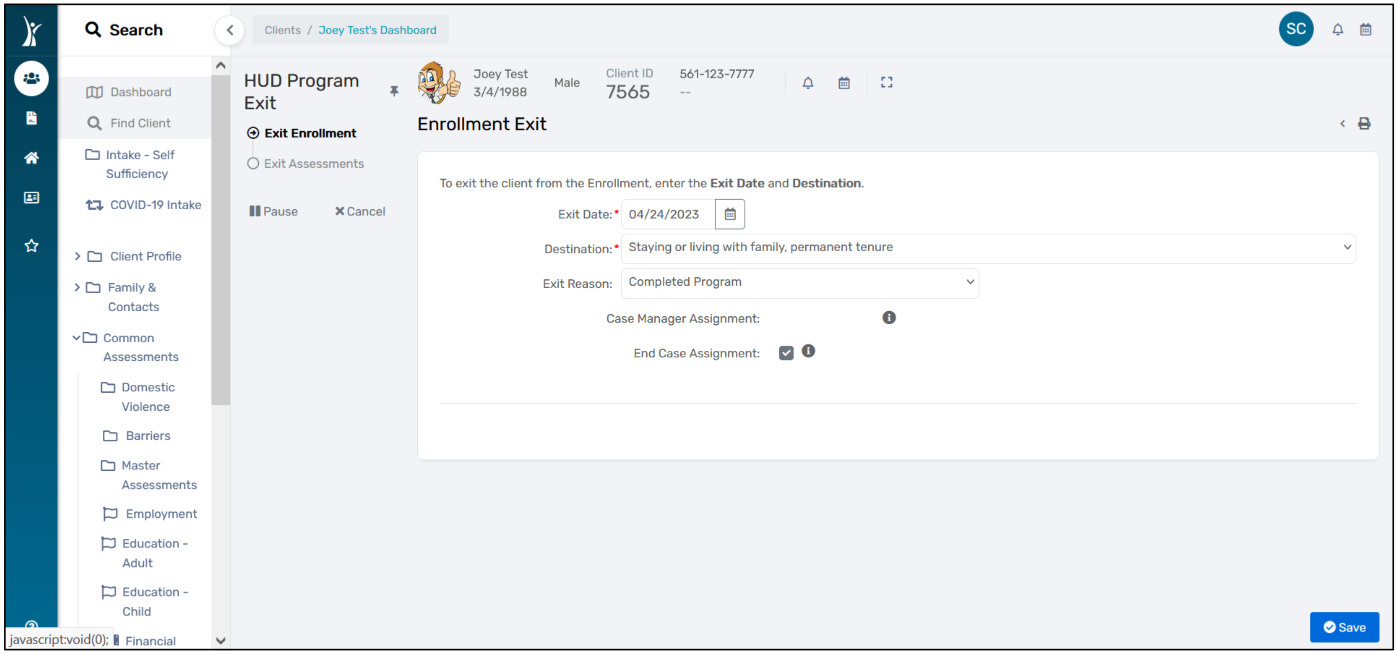
Clients served will exit to permanent housing, Continued

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

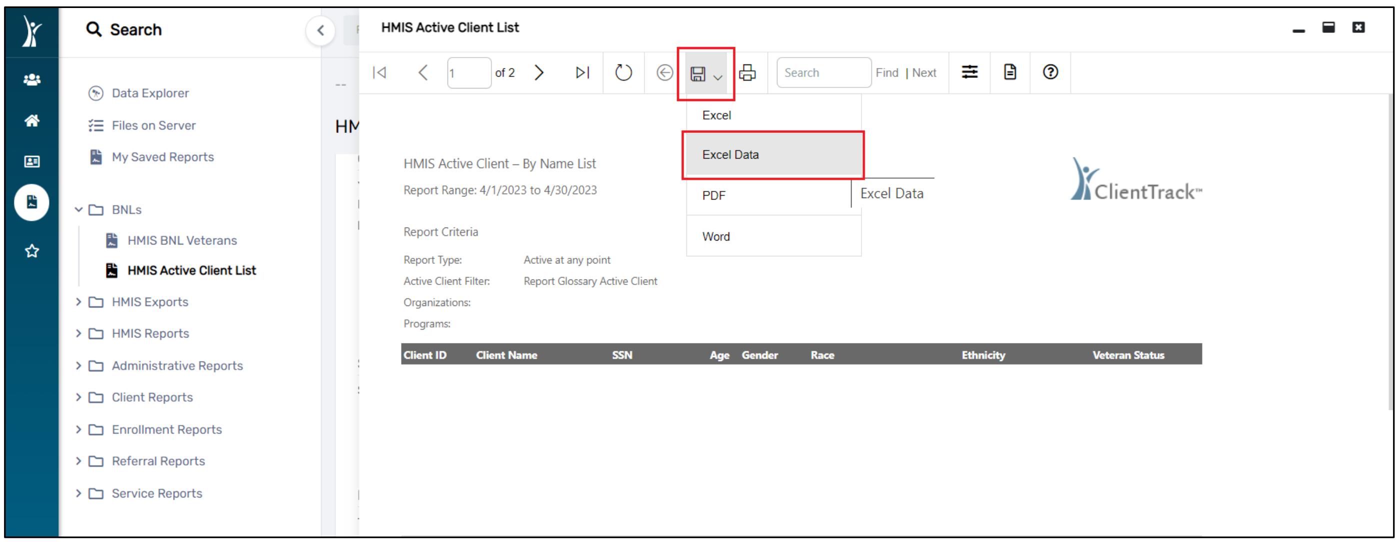


OUTCOME ENTRY & REPORTING: Homelessness

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'



OUTCOME ENTRY & REPORTING: Homelessness

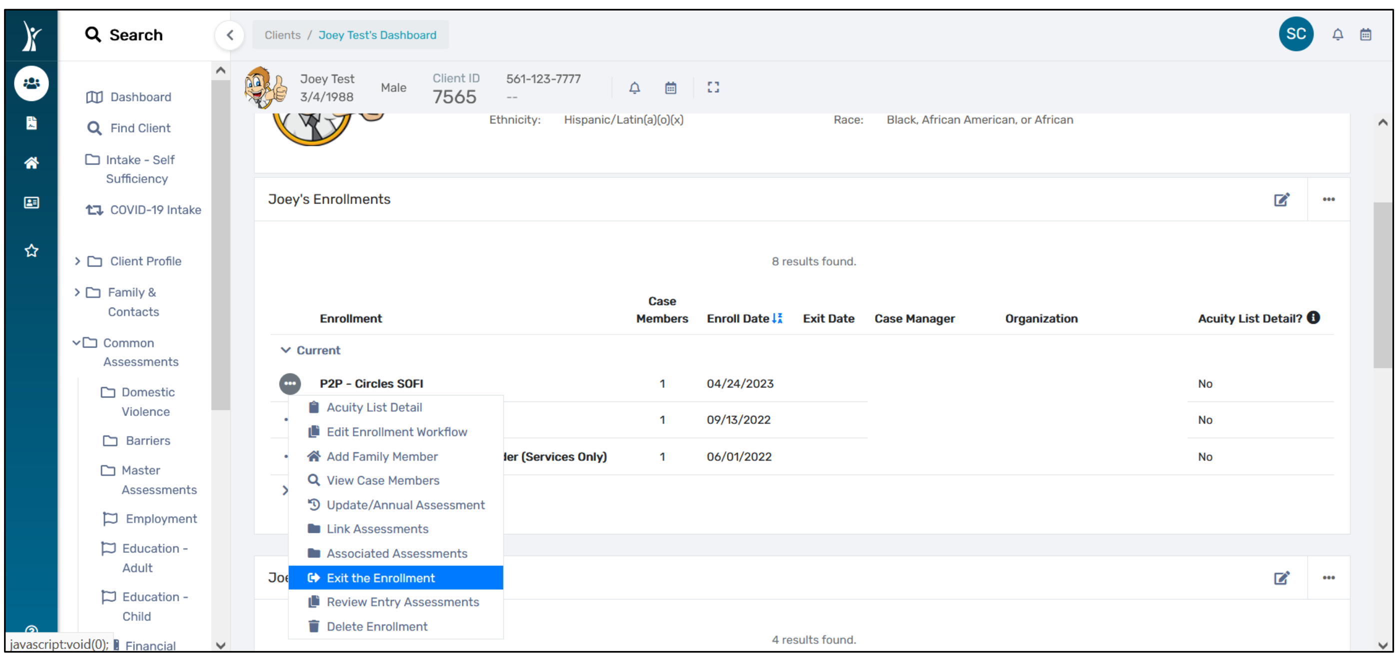
Individuals do not return to homelessness

- ***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'



OUTCOME ENTRY & REPORTING: Homelessness

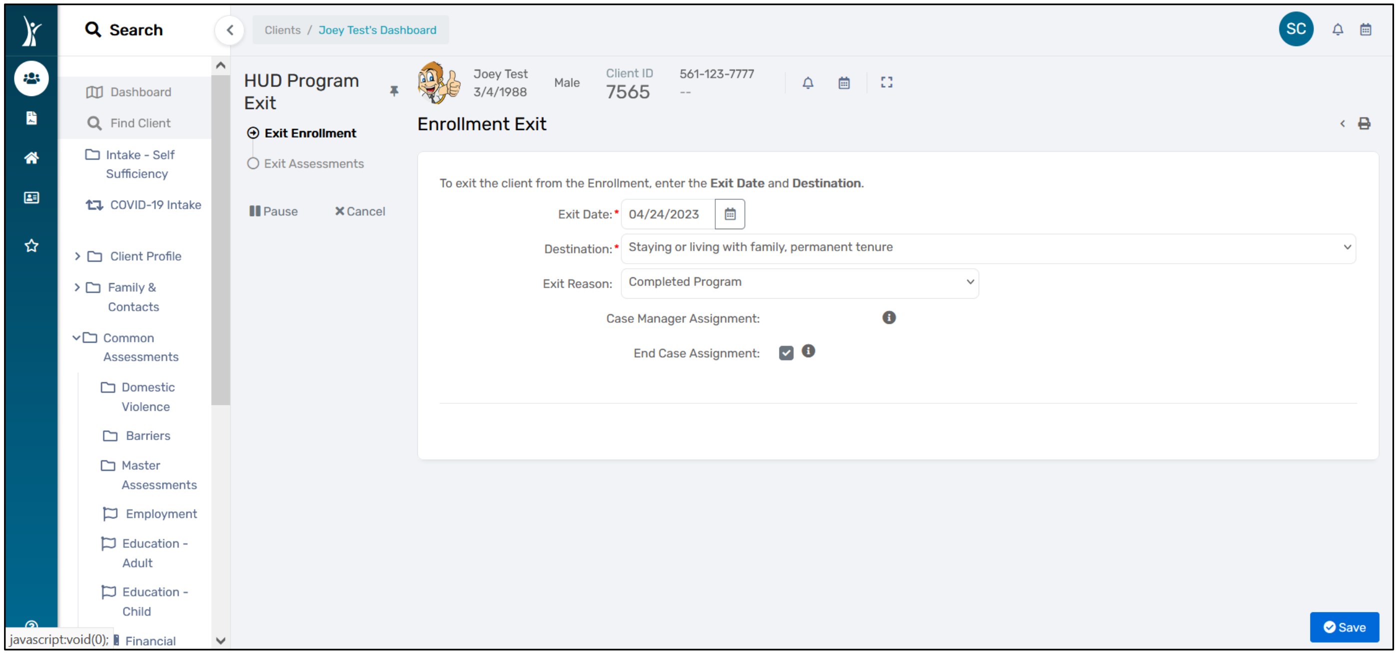
Individuals do not return to homelessness, Continued

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

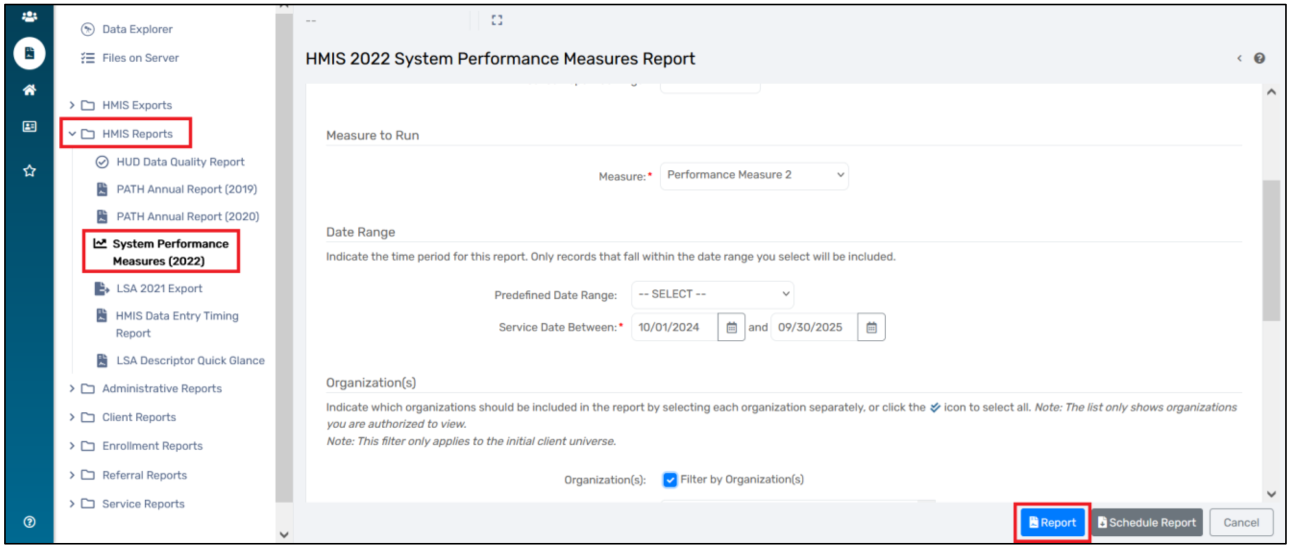


OUTCOME ENTRY & REPORTING: Homelessness

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)

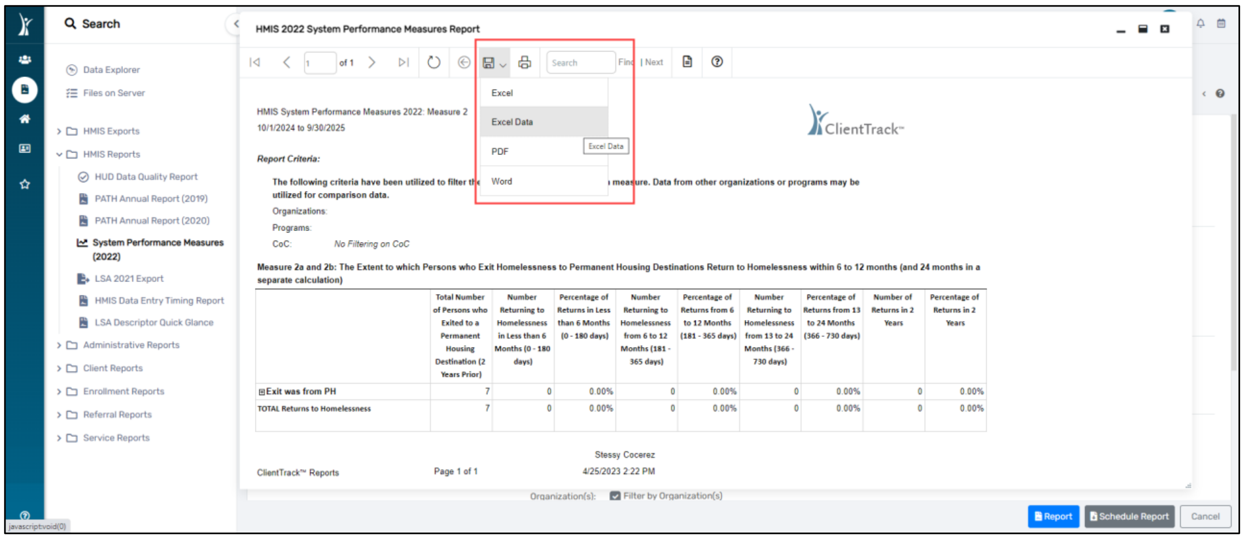


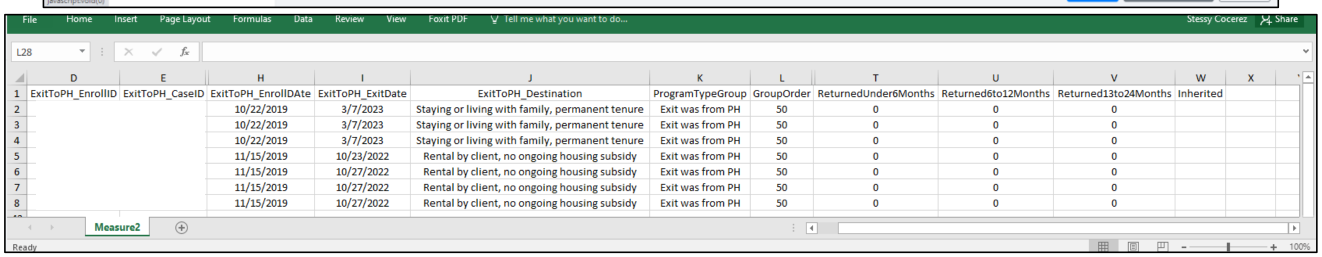
OUTCOME ENTRY & REPORTING: Homelessness

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





ExitToPH_EnrollID	ExitToPH_CaseID	ExitToPH_EnrollDAte	ExitToPH_ExitDate	ExitToPH_Destination	ProgramTypeGroup	GroupOrder	ReturnedUnder6Months	Returned6to12Months	Returned13to24Months	Inherited
		10/22/2019	3/7/2023	Staying or living with family, permanent tenure	Exit was from PH	50	0	0	0	
		10/22/2019	3/7/2023	Staying or living with family, permanent tenure	Exit was from PH	50	0	0	0	
		10/22/2019	3/7/2023	Staying or living with family, permanent tenure	Exit was from PH	50	0	0	0	
		11/15/2019	10/23/2022	Rental by client, no ongoing housing subsidy	Exit was from PH	50	0	0	0	
		11/15/2019	10/27/2022	Rental by client, no ongoing housing subsidy	Exit was from PH	50	0	0	0	
		11/15/2019	10/27/2022	Rental by client, no ongoing housing subsidy	Exit was from PH	50	0	0	0	
		11/15/2019	10/27/2022	Rental by client, no ongoing housing subsidy	Exit was from PH	50	0	0	0	

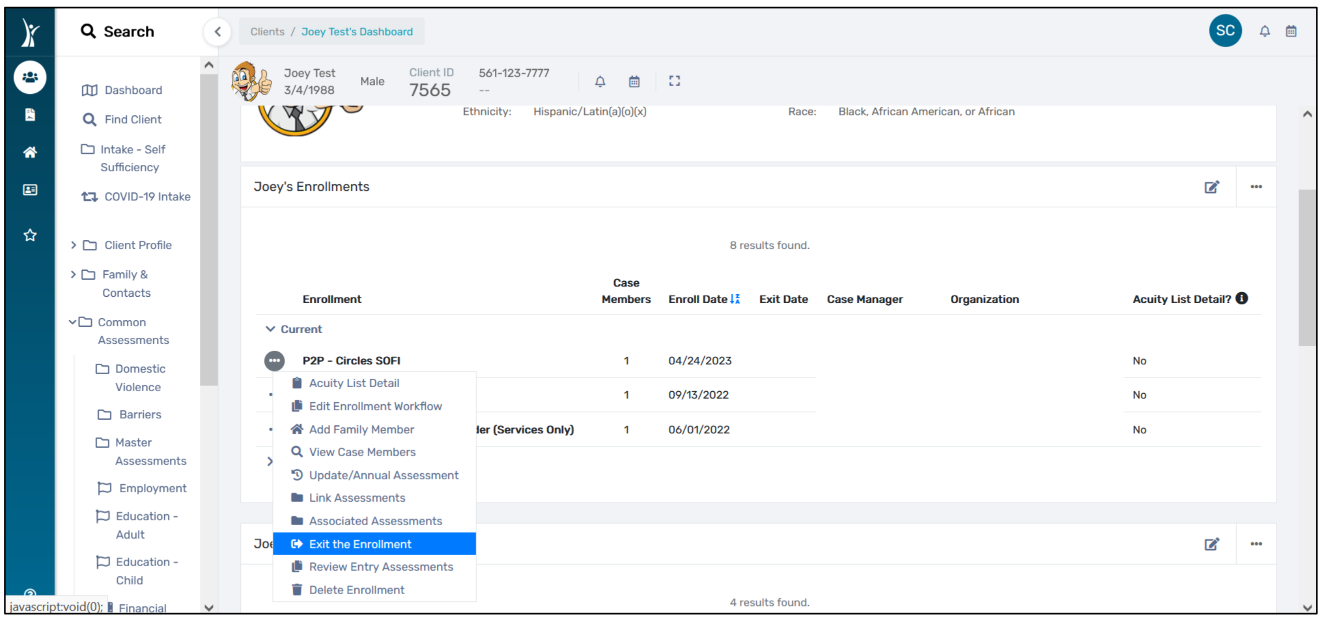
OUTCOME ENTRY & REPORTING: Homelessness

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'



OUTCOME ENTRY & REPORTING: Homelessness

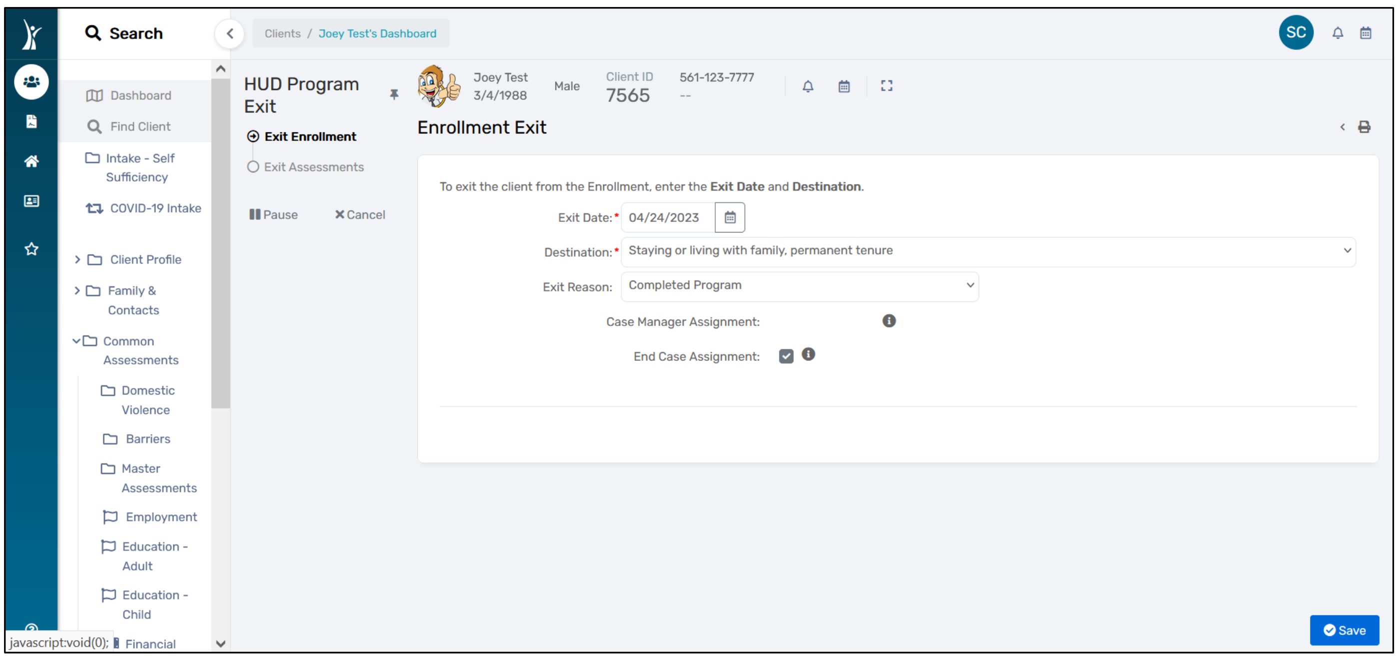
Clients served will remain stably housed or exit to HUD defined Permanent Housing, Continued

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

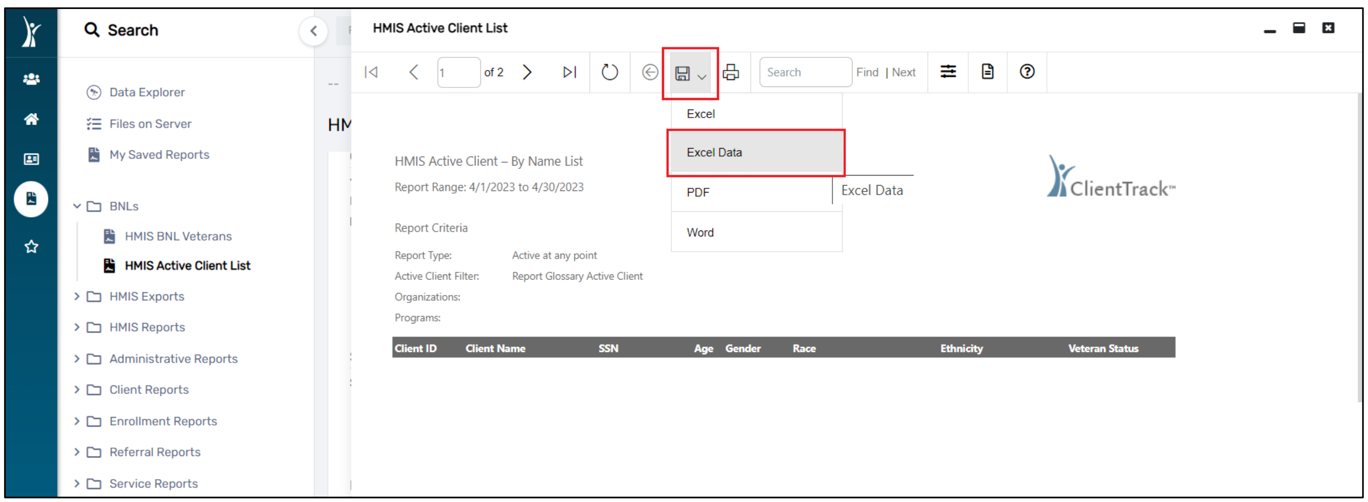


OUTCOME ENTRY & REPORTING: Homelessness

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



OUTCOME ENTRY & REPORTING: Homelessness

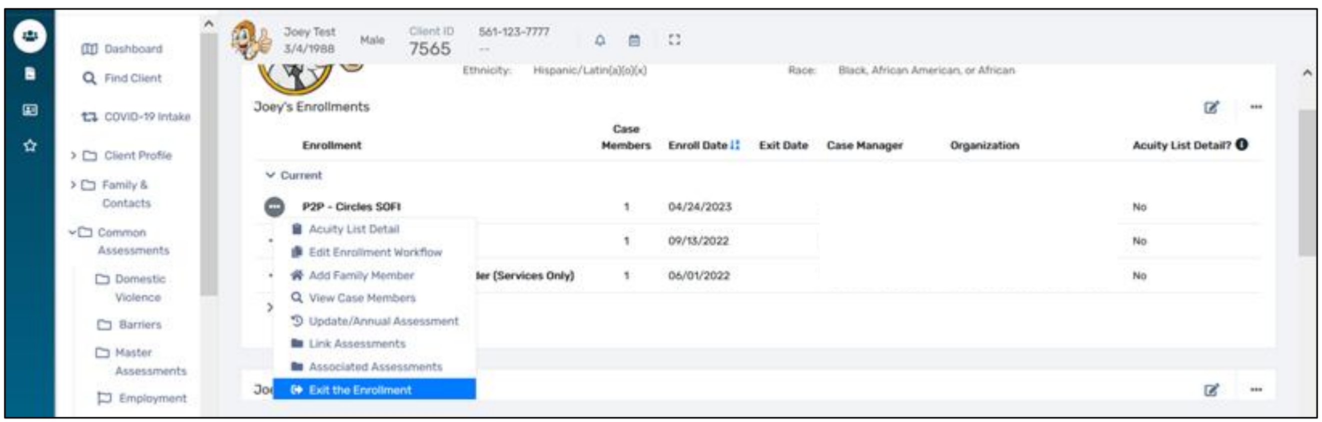
Homeless Prevention Outcome 1: *Clients served will remain stably housed and maintain their housing for 3 months after receiving financial assistance*

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'



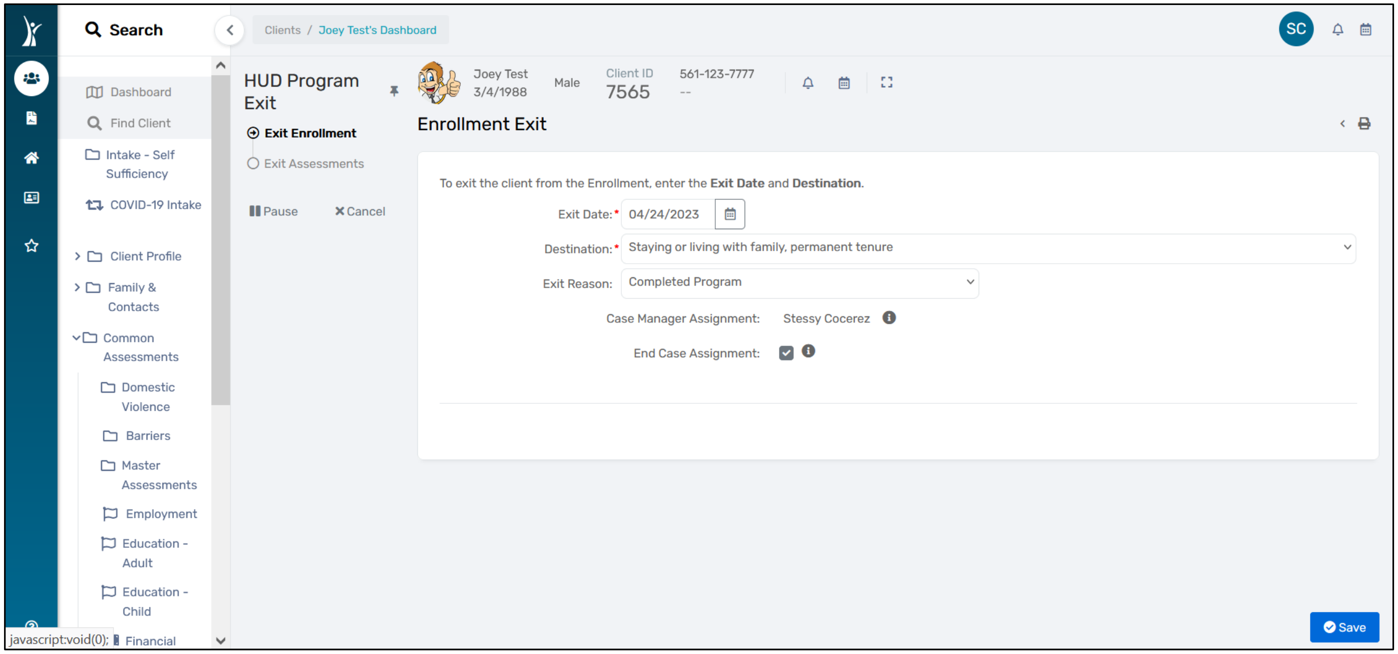
OUTCOME ENTRY & REPORTING: Homelessness

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

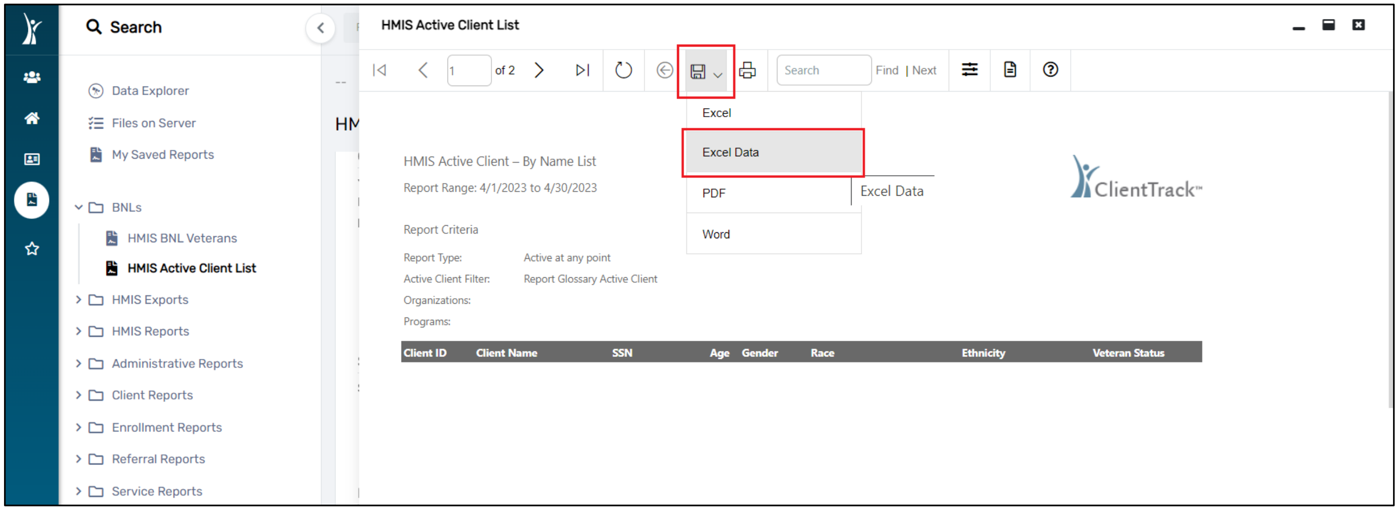


OUTCOME ENTRY & REPORTING: Homelessness

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'



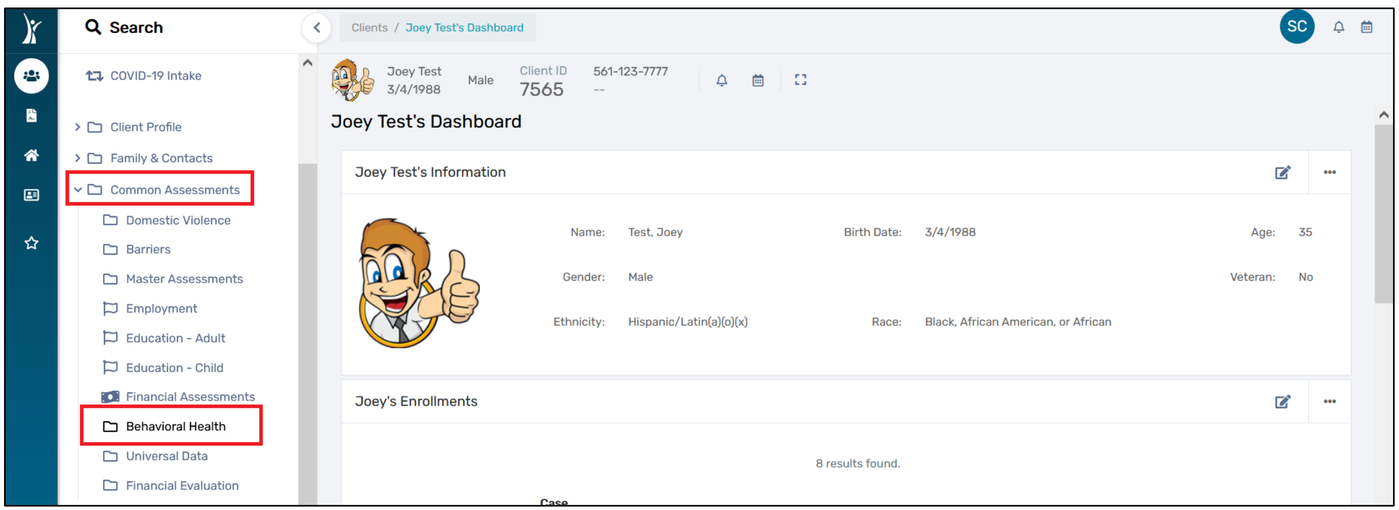
OUTCOME ENTRY & REPORTING: Behavioral Health

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 Capitsl Index:

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

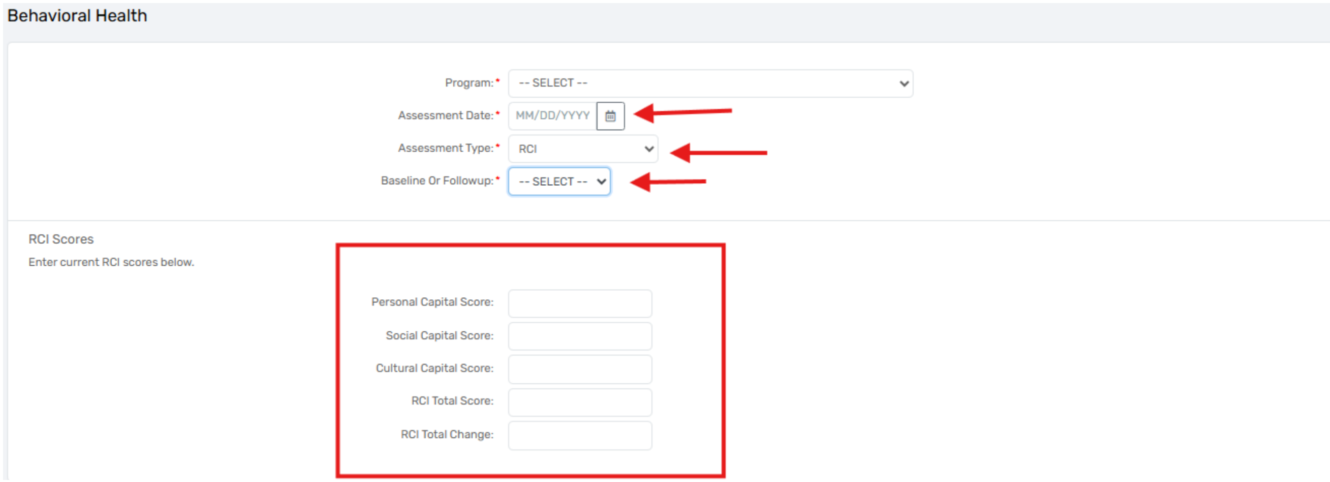


OUTCOME ENTRY & REPORTING: Behavioral Health

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.



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)

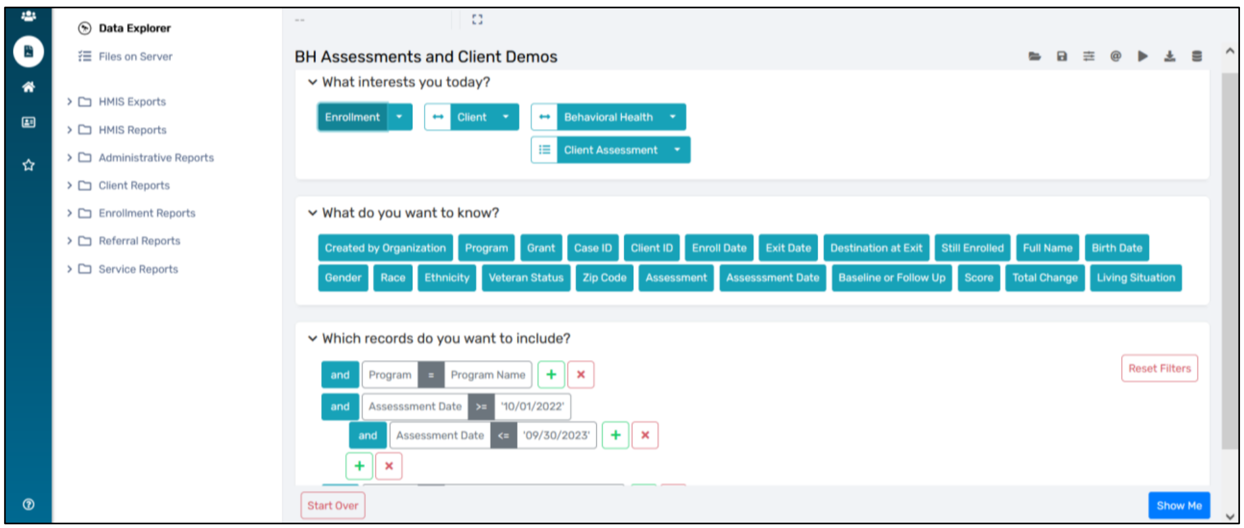
To run a report for the Recovery Capital Index assessments:

- 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

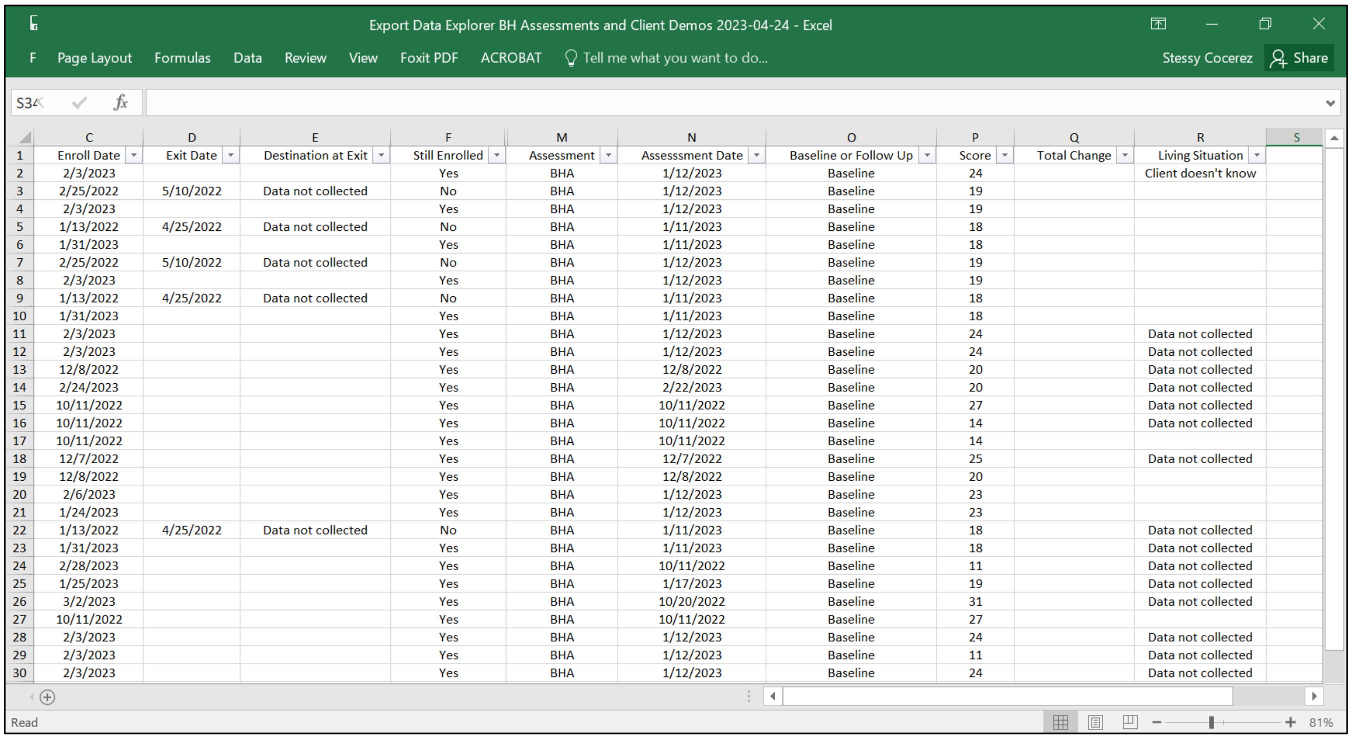
- Under "Which records do you want to include?", only adjust the dates and the Program Name; leave the rest of the setup as is.

OUTCOME ENTRY & REPORTING: Behavioral Health

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



➢ 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



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

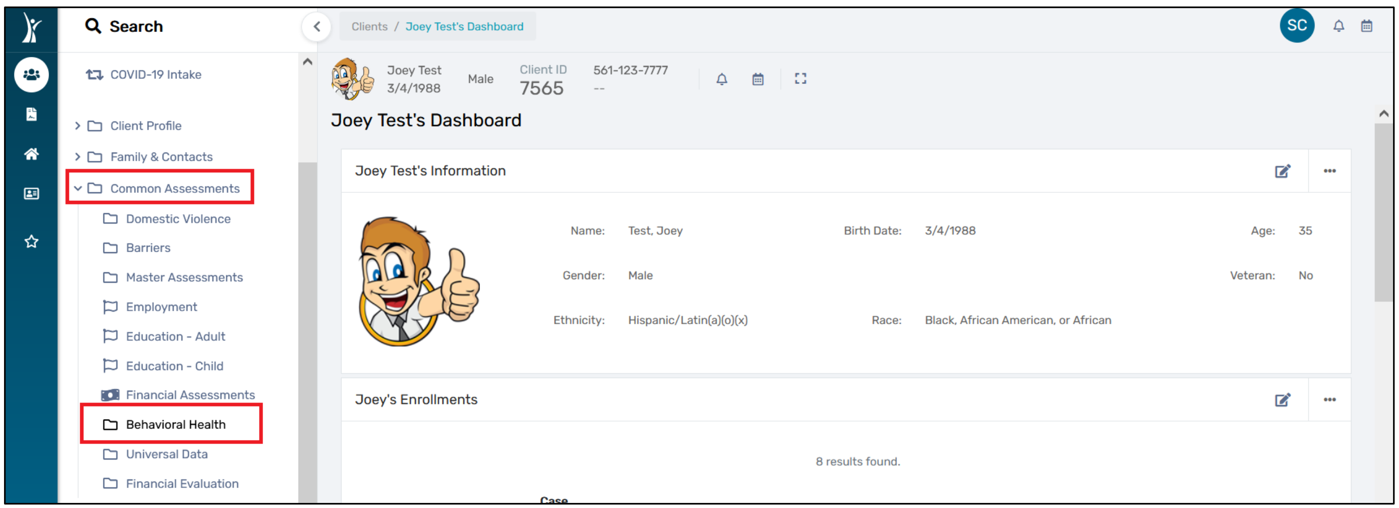
OUTCOME ENTRY & REPORTING: Behavioral Health

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"



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'

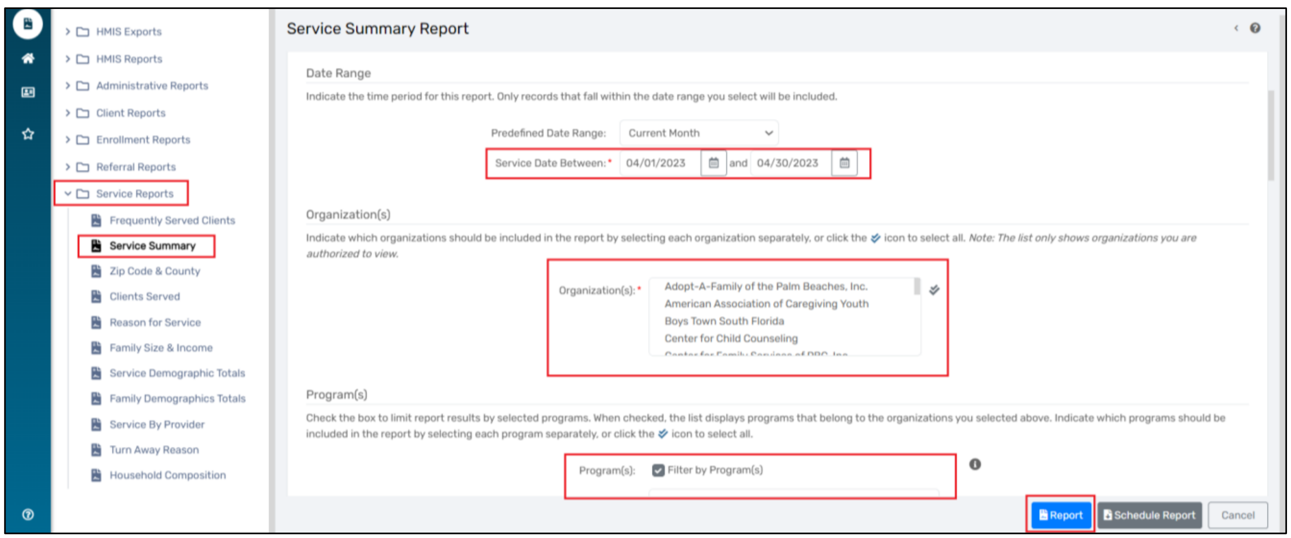
➢ Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program) and press 'Report'

<u>OUTCOME ENTRY & REPORTING: Strategic Partnerships</u>

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.



To enter Exit Destination information:

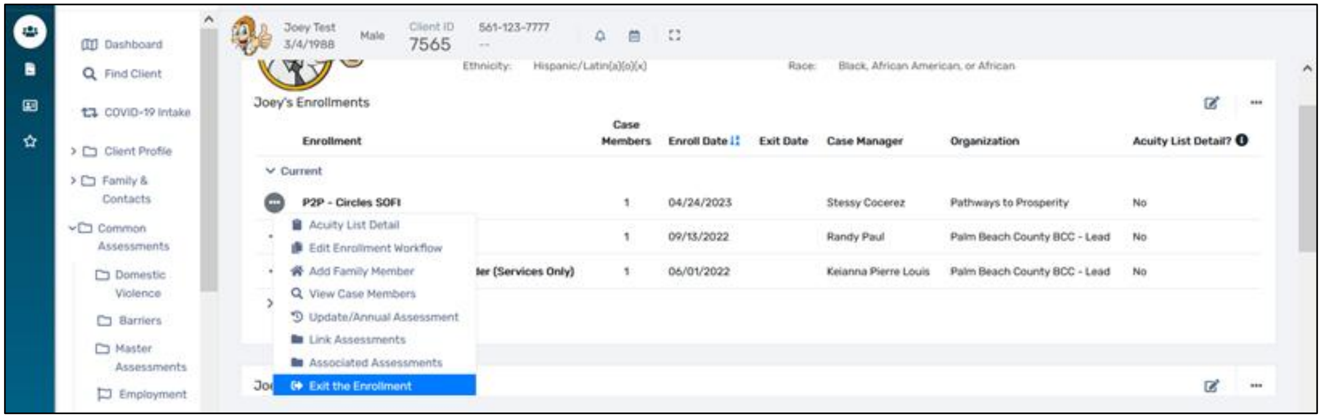
- ➢ Go to the client page in ClientTrack
- ➢ Click on the action dropdown "(…)" to the left of your client's enrollment into your program and select 'Exit the Enrollment'

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.):

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



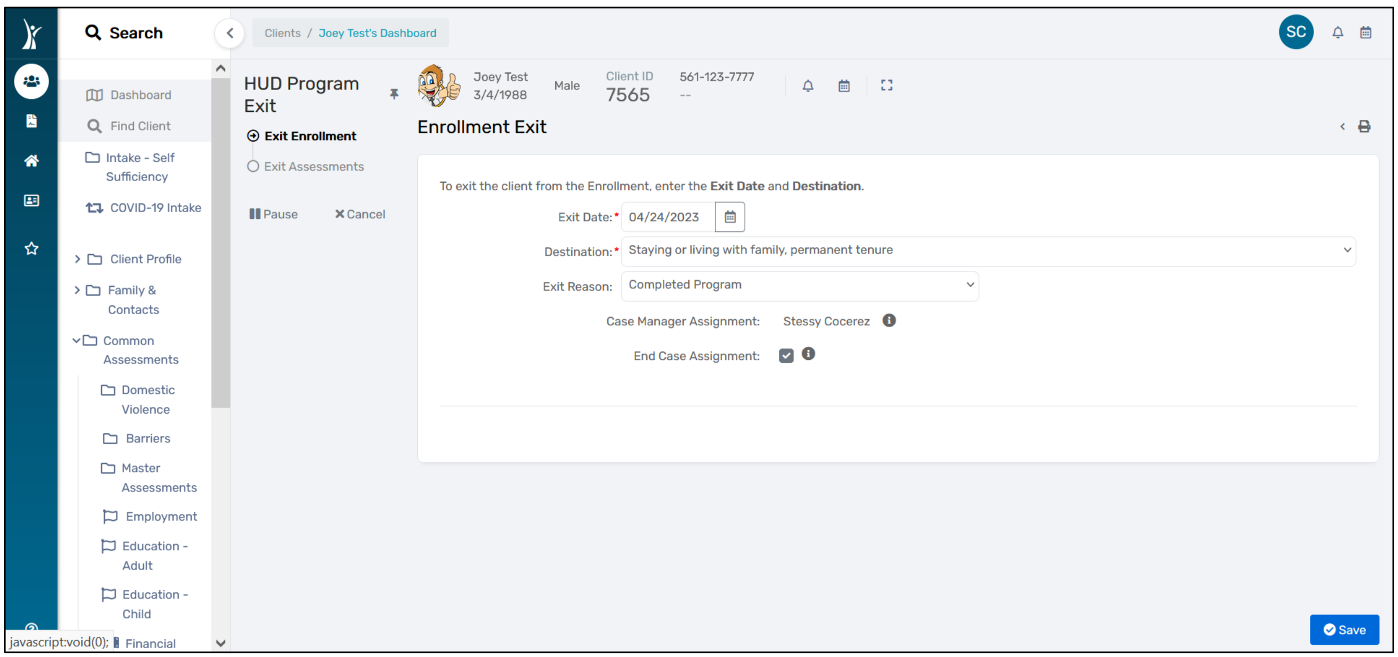
- Complete the Universal Data Assessment, the Barriers/Special Needs Assessment, and the Income Assessment
- When complete, press “Finish” to close the workflow

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

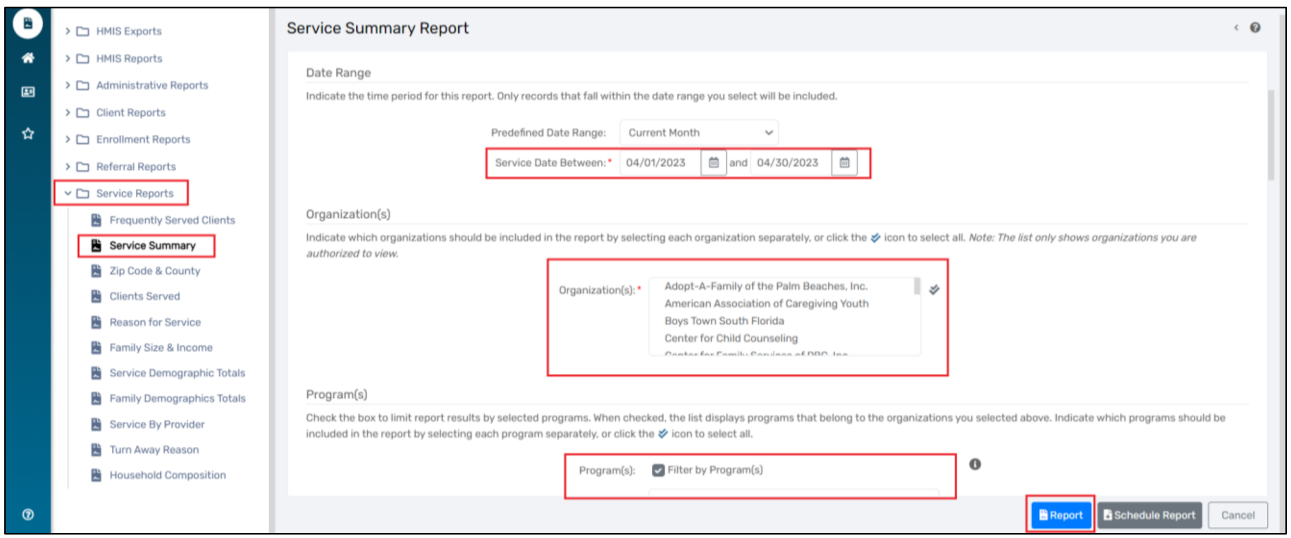
To run a Service Summary report:

- Go to the Reports page in CT



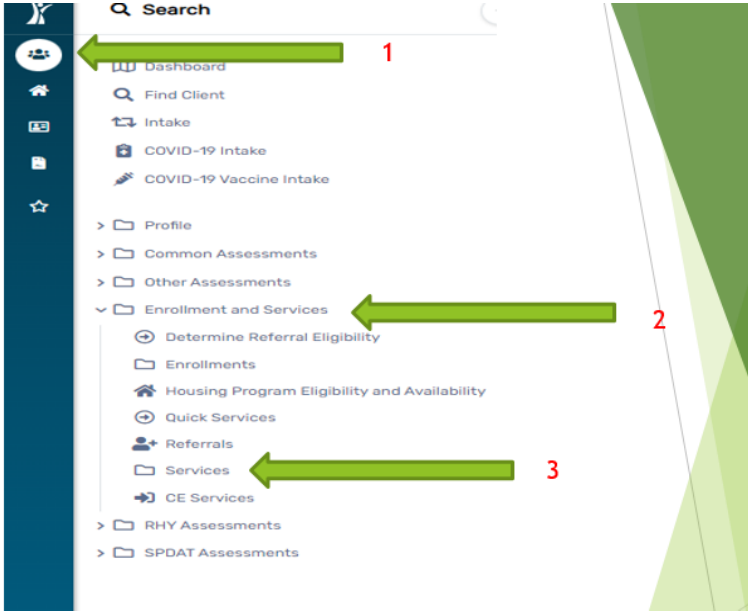
- Select ‘Service Reports’
- Select ‘Service Summary’
- Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program) and press ‘Report’

ENTERING OUTCOME ACHIEVEMENTS in HMIS/CMIS



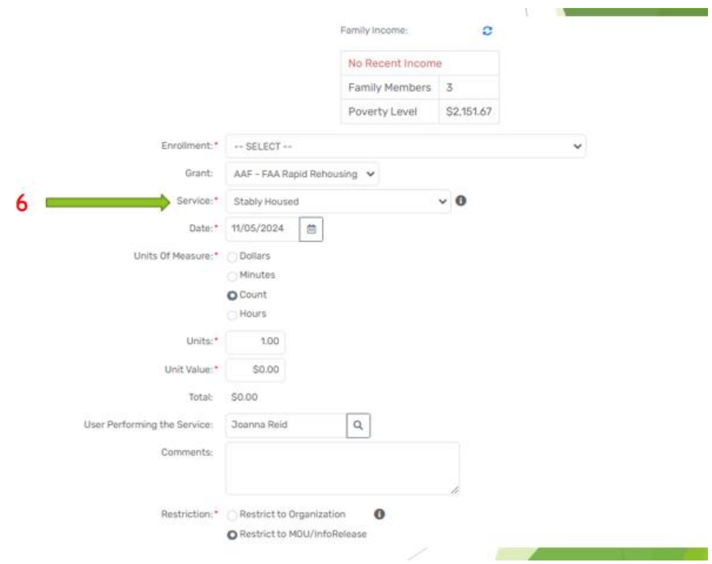
1. Click on Client Dashboard
2. Click on "Enrollment and Services"
3. Click on "Services"

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)



Accessing SAMIS for Quarter Reports

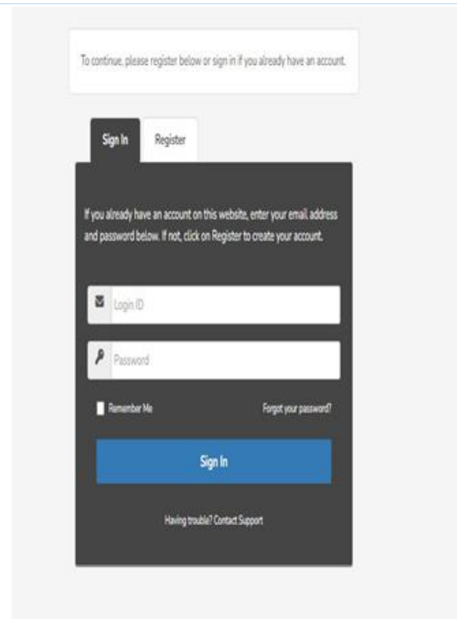
Access link

- 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 .

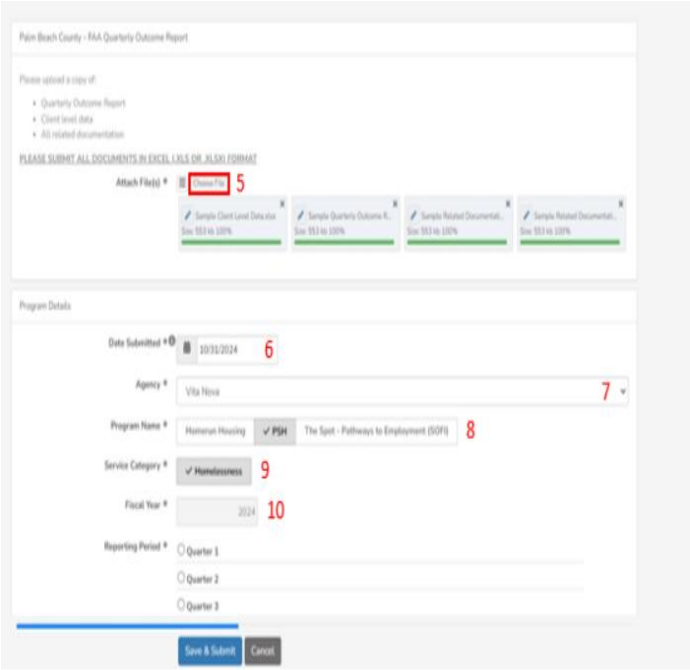
Steps

Commented [PC1]: We need to get clearer pics

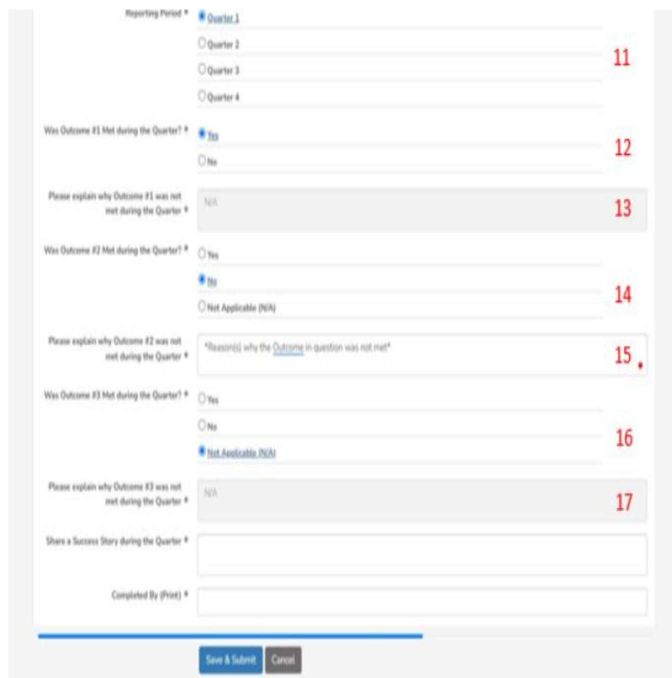
1. Select the "Sign In" tab.
2. Enter your SAMIS Login ID.
3. Enter your SAMIS Password.
4. Select the blue "Sign In" button.



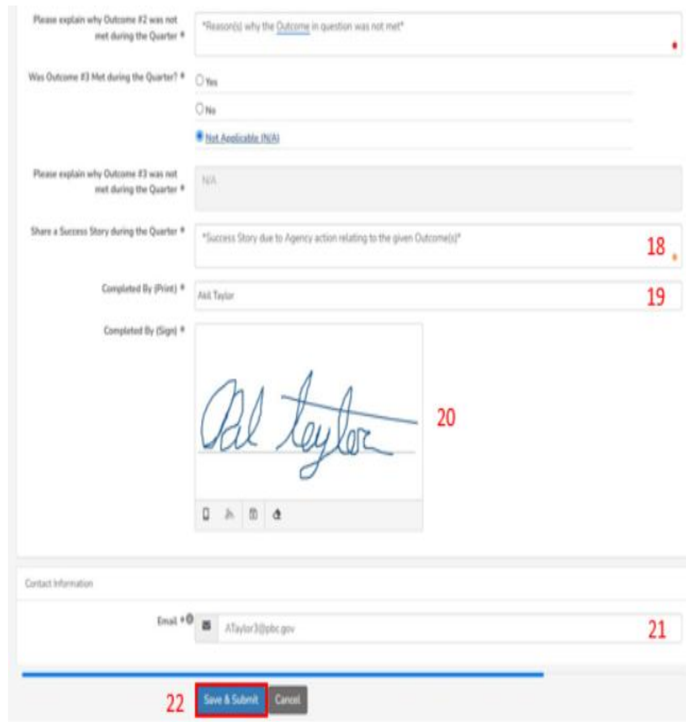
5. In the Attach File(s) field, select the grey "Choose File" button and select all of the documents you wish to upload (including but not limited to the Quarterly Outcome Report and Client Level Data).
6. Enter the date on which this report is being filled out.
7. Select the Agency for which you are 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



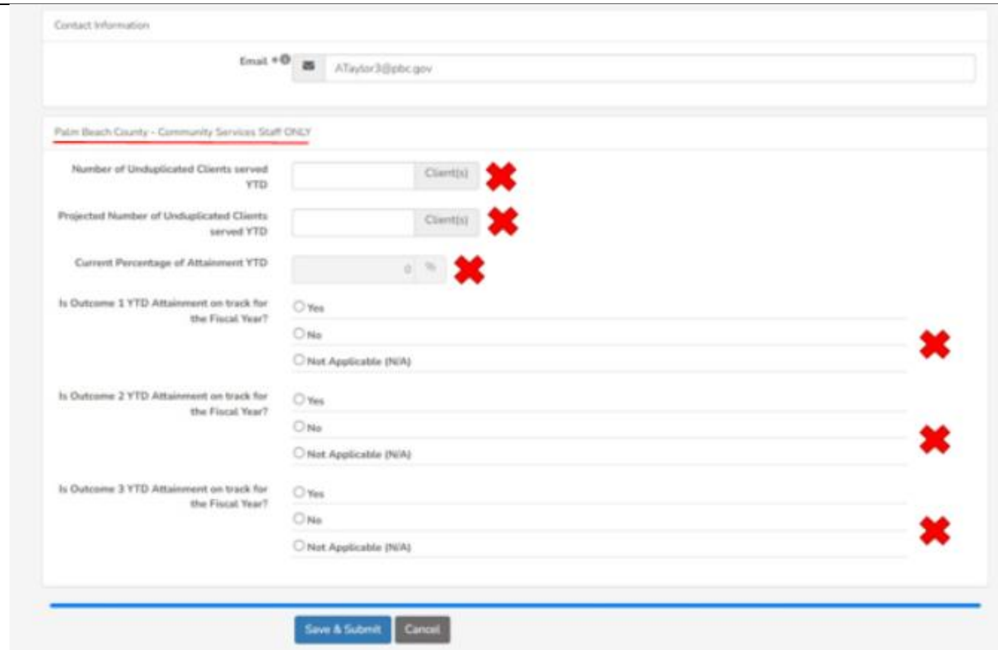
11. Select the Fiscal Quarter of which you would like to report on.
    a. Quarter 1 – October 1st – December 31st
    b. Quarter 2 – January 1st – March 31st
    c. Quarter 3 – April 1st – June 30th
    d. Quarter 4 – July 1st – September 30th
12. Based on your Program's Outcome, enter if Outcome #1 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.



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.

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

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

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).