

Desk Guides

ClientTrack 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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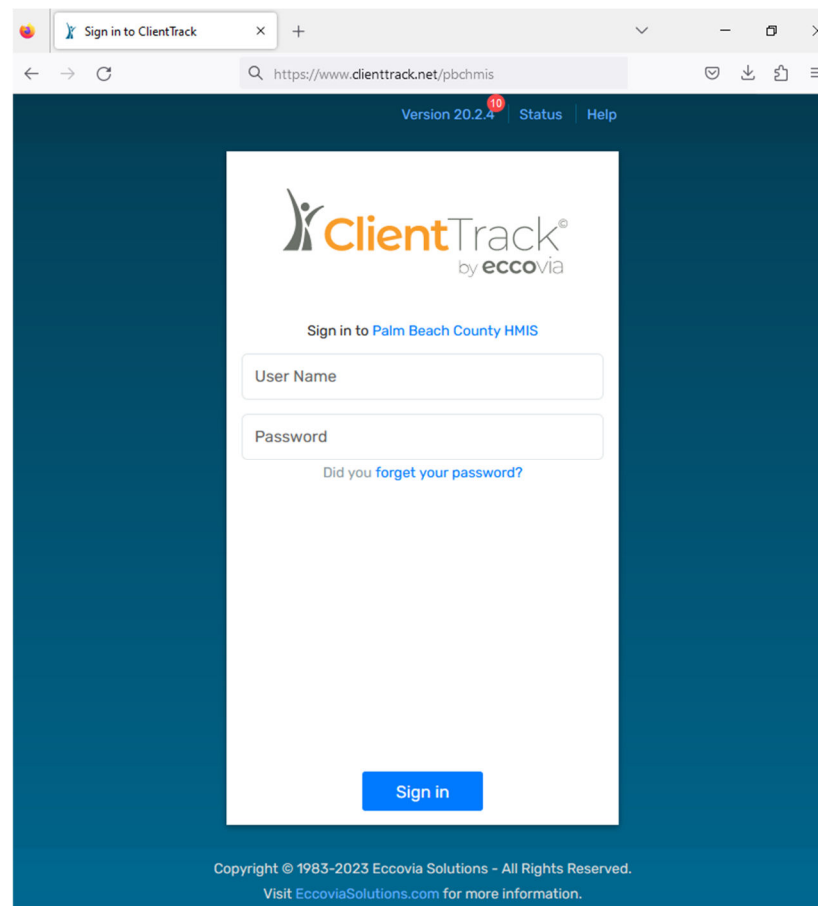
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LOG IN –

- <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

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)' and 'Housing Needs Assessment'.

Client Services

The client's service history displays below. To record a service, click **Add New Service**. To record multiple services, click **Quick Services**. To edit or view an existing service, click **Edit Service** next to the record.

+ Add New Service **Quick Services** **+ Add CE Event**

4 results found.

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	

Cancel

ENTERING SERVICES (cont.) –

To enter a service (cont.):

- 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

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

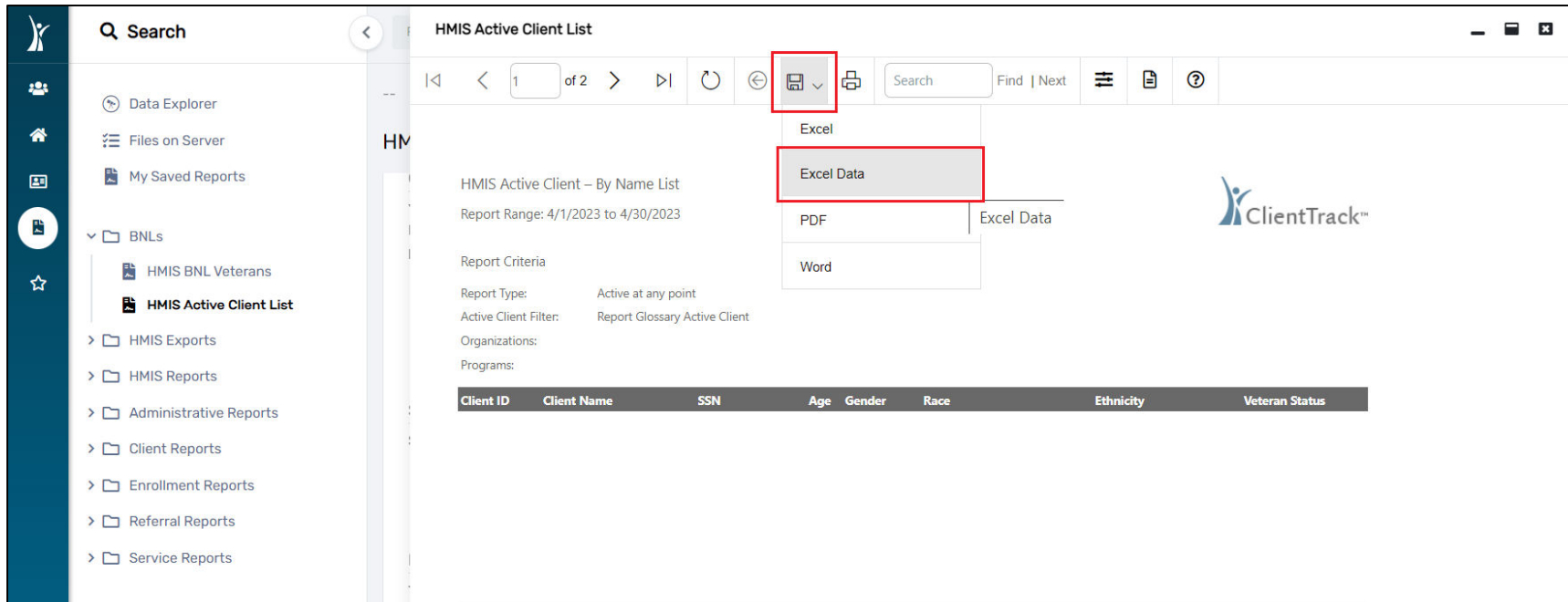
Save Cancel

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



The screenshot displays the ClientTrack interface for the 'HMIS Active Client List' report. The left sidebar contains navigation links such as 'Data Explorer', 'Files on Server', 'My Saved Reports', and a list of 'BNLs' including 'HMIS BNL Veterans' and '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:'. A table of client data is visible at the bottom with columns: Client ID, Client Name, SSN, Age, Gender, Race, Ethnicity, and Veteran Status. A red box highlights the 'Save' icon in the top toolbar, which has opened a dropdown menu with 'Excel Data' selected.

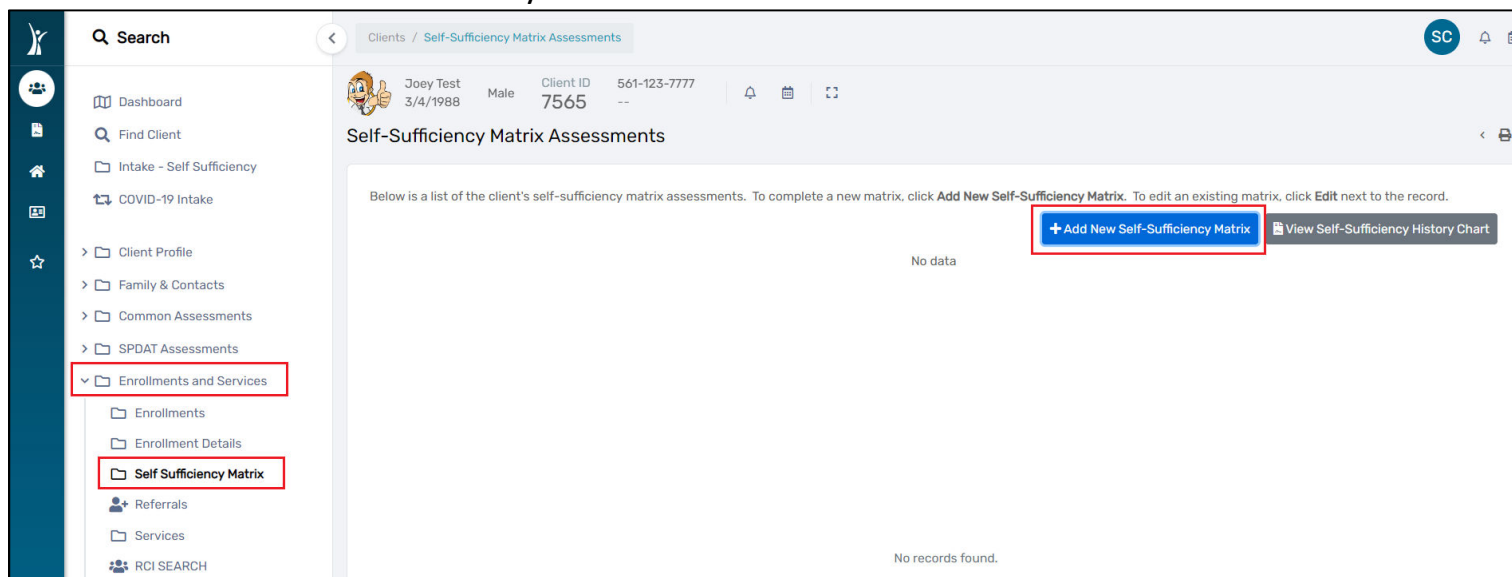
OUTCOME ENTRY & REPORTING: Economic Stability

Individuals maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

This outcome is based on the Self-Sufficiency Matrix Assessment (SSM). At least two (2) 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.

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’



OUTCOME ENTRY & REPORTING: Economic Stability

Individuals maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

To enter a Self-Sufficiency Matrix assessment (cont.):

- Enter the correct date for the assessment
- Select the correct 'Assessment Type' for the entry
- *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

Search

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

SC

Dashboard

Find Client

Intake - Self Sufficiency

COVID-19 Intake

Client Profile

Family & Contacts

Common Assessments

SPDAT Assessments

Enrollments and Services

Enrollments

Enrollment Details

Self Sufficiency Matrix

Referrals

Services

RCI SEARCH

CE Services

Acuity List Detail History

RHY Assessments

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

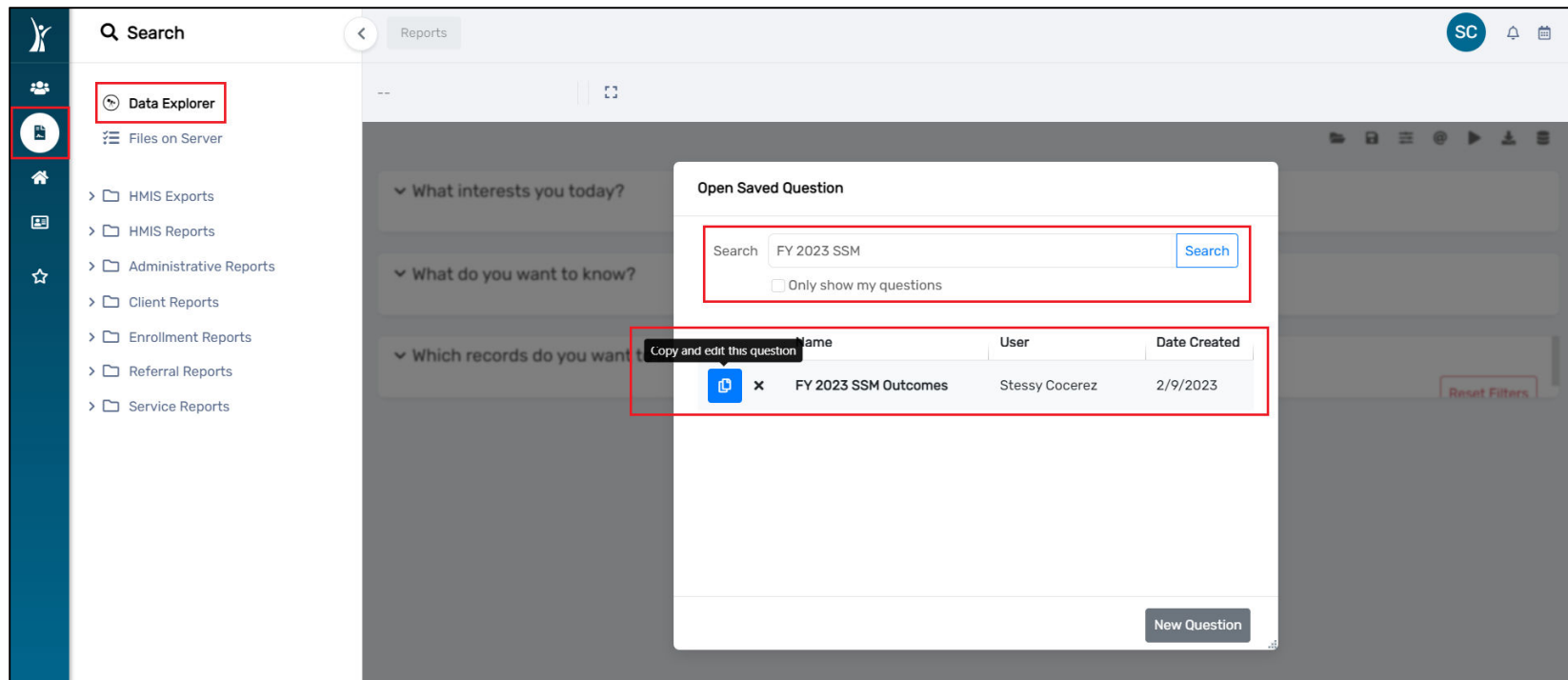
Save Cancel

OUTCOME ENTRY & REPORTING: Economic Stability

Individuals maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

To run a Self-Sufficiency Matrix (SSM) 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 "FY 2023 SSM"
 - Look for the report created by Stessy Cocerez on 2/9/2023 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 Stability

Individuals maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

To run a Self-Sufficiency Matrix (SSM) 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

The screenshot shows a web application interface for reporting. On the left is a sidebar with a search bar and a list of navigation items: Data Explorer, Files on Server, HMIS Exports, HMIS Reports, Administrative Reports, Client Reports, Enrollment Reports, Referral Reports, and Service Reports. The main area displays a report titled 'FY 2023 SSM Outcomes'. Above the table, it says '4 results found.' The table has the following columns: Created, Program, Client ID (with a sort icon), 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 buttons for 'Visualize', a download icon (highlighted with a red box), and 'Export to Excel'. At the bottom left of the application, there is a button labeled 'Export Data Explorer...xlsx' (also highlighted with a red box). The bottom right corner has a 'Show all' button and a close icon.

OUTCOME ENTRY & REPORTING: Economic Stability

Individuals that obtain financial resources that will lead to stability

This outcome is based on services (*see section on how to enter services*). The outcome is a proxy measured from the financial resource 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'

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 PBC, 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)

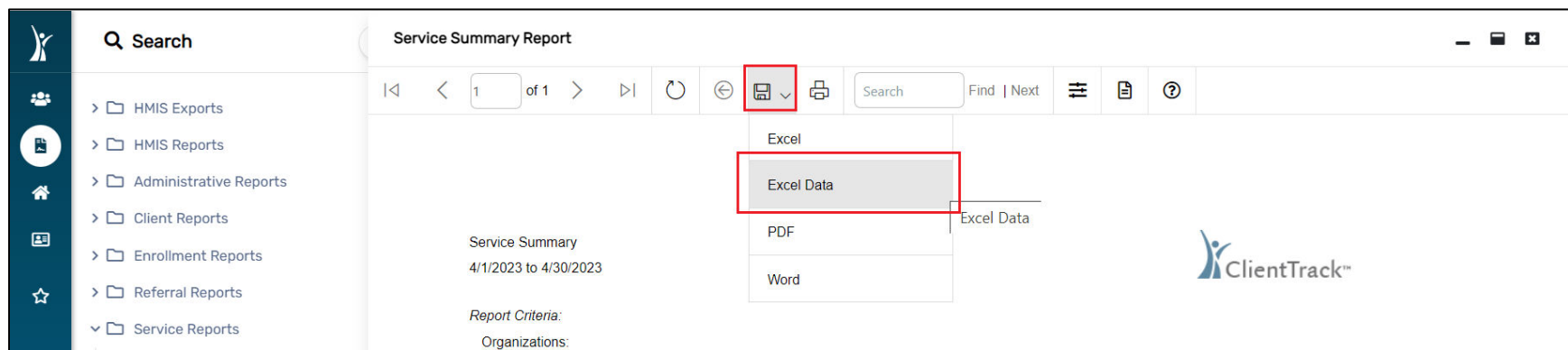
Report **Schedule Report** **Cancel**

OUTCOME ENTRY & REPORTING: Economic Stability

Individuals that obtain financial resources that will lead to stability

To run a Service Summary report (cont.):

- 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

Individuals that achieve at least one (1) objective on the Individualized Educational/Support Plan (IEP/ISP)

This outcome is based on services (*see section on how to enter services*). The outcome is measured from the IEP/ISP objective 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'

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 PBC, 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)

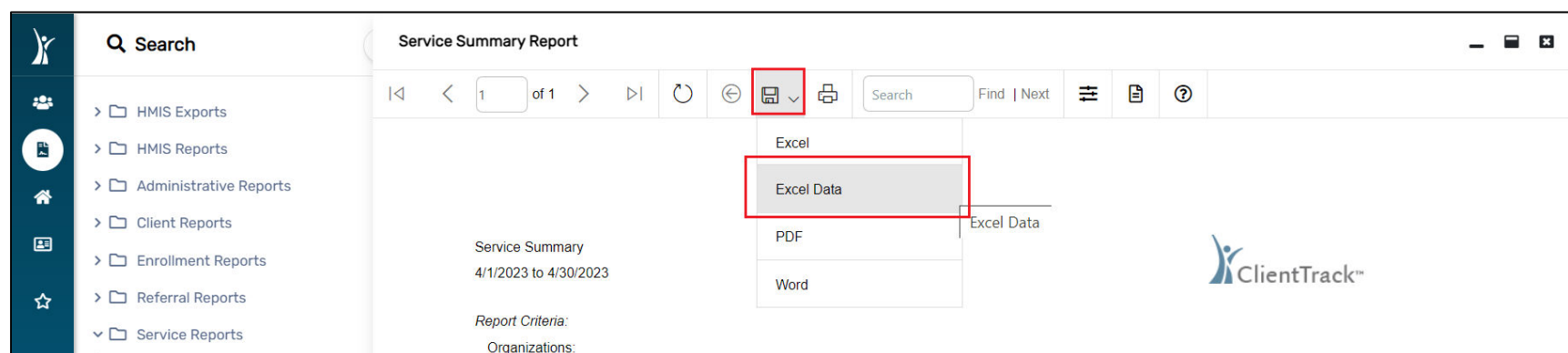
Report **Schedule Report** **Cancel**

OUTCOME ENTRY & REPORTING: Economic Stability

Individuals that achieve at least one (1) objective on the Individualized Educational/Support Plan (IEP/ISP)

To run a Service Summary report (cont.):

- When the report populates, click on the save icon to reveal a dropdown and export the report to Excel Data



OUTCOME ENTRY & REPORTING: Economic Mobility - Income

All agencies participating in the Securing Our Future Initiative (SOFI) should be entering income information for their clients. The information should be collected at least two (2) times per fiscal year. The first financial assessment done in the fiscal year (either in the first quarter or at the time of client enrollment) will be considered the baseline and any subsequent assessment(s) (either in the fourth quarter or at the time of client exit) will be considered follow-ups or updates during the enrollment period.

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.

The screenshot displays a web-based client intake assessment form. The left sidebar contains navigation options: 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 the 'Intake (2298)' for 'Joey Test', a male client born 3/4/1988 with Client ID 7565. The 'Income and Sources, Non-Cash Benefits' section includes fields for 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), and Did Client Maintain Wages for 90 Days or More (-- SELECT --). Below this is a table for 'Income' with columns for Type, Description, Monthly Amount, and Restriction. One entry is visible: 'Earned Income (i.e., employment income)' with a monthly amount of \$1,000.00 and a restriction of 'Restrict to MOU/InfoRelease'. The form includes 'Pause' and 'Cancel' buttons, and a 'Save and Close' button at the bottom right.

Intake (2298)

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

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
<input checked="" type="checkbox"/>	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 ClientTrack
- Click on the action dropdown “(...)” to the left of your client’s enrollment into your program and select ‘Update/Annual Assessment’.

The screenshot shows the ClientTrack interface for a client named Joey Test. The client's profile information is displayed at the top: Joey Test, Male, Client ID 7565, 561-123-7777. The 'Enrollments' section is active, showing a table with 8 results found. The table columns are Enrollment, Case Members, Enroll Date, Exit Date, Case Manager, Organization, and Acuity List Detail?.

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	1	06/01/2022				No
View Case Members						
Update/Annual Assessment						
Link Assessments						
Associated Assessments						
Exit the Enrollment						
Review Entry Assessments						
Delete Enrollment						

The action dropdown menu for the first enrollment is open, showing the following options: Acuity List Detail, Edit Enrollment Workflow, Add Family Member, View Case Members, Update/Annual Assessment (highlighted), Link Assessments, Associated Assessments, Exit the Enrollment, Review Entry Assessments, and Delete Enrollment.

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

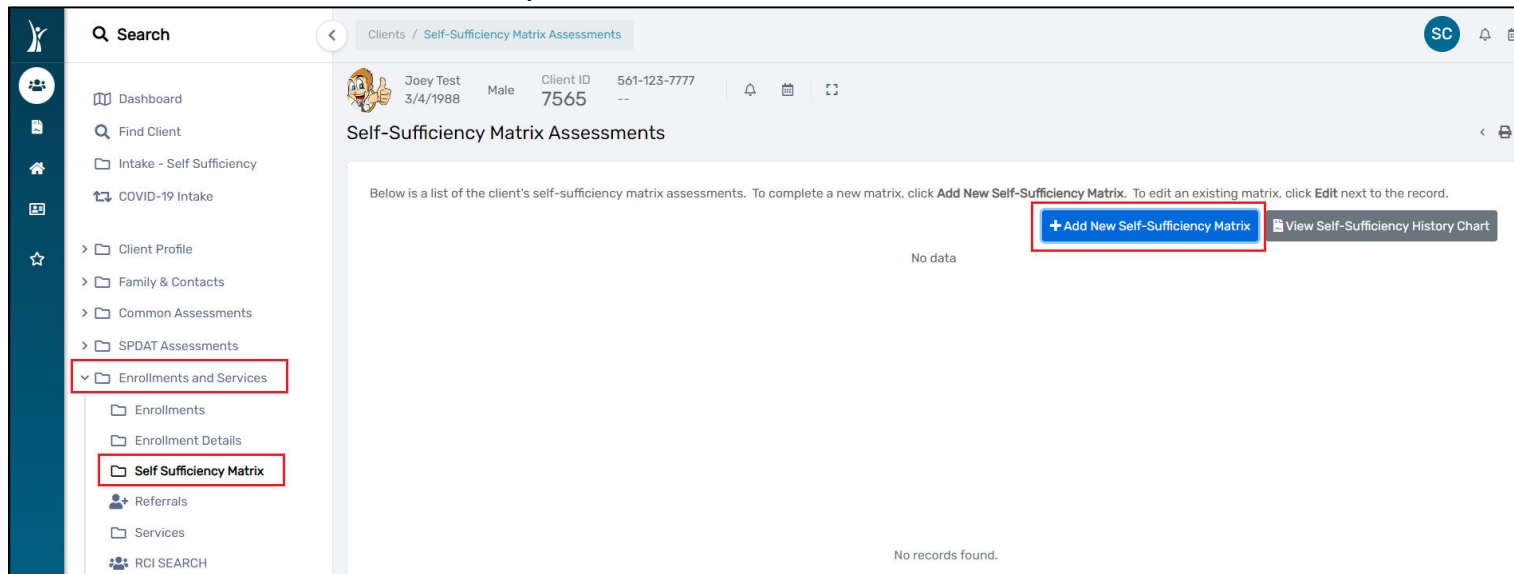
OUTCOME ENTRY & REPORTING: Economic Mobility

Households maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

This outcome is based on the Self-Sufficiency Matrix Assessment (SSM). 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 there is an increase/maintenance on the SSM in one or more categories.

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’



OUTCOME ENTRY & REPORTING: Economic Mobility

Households maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

To enter a Self-Sufficiency Matrix assessment (cont.):

- Enter the correct date for the assessment
- Select the correct 'Assessment Type' for the entry
- *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

Search

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

SC

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

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

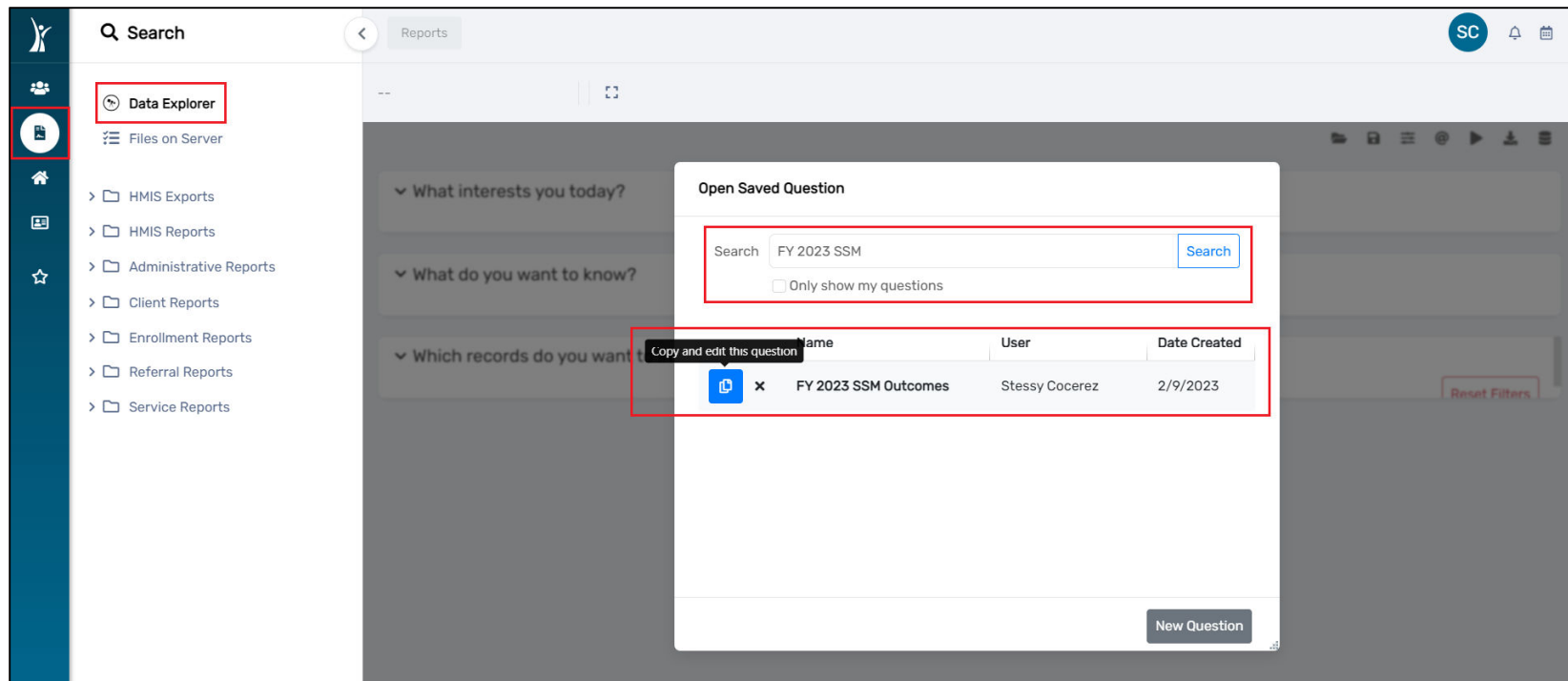
Save Cancel

OUTCOME ENTRY & REPORTING: Economic Mobility

Households maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

To run a Self-Sufficiency Matrix (SSM) 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 "FY 2023 SSM"
 - Look for the report created by Stessy Cocerez on 2/9/2023 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 maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

To run a Self-Sufficiency Matrix (SSM) 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

The screenshot shows the 'Data Explorer' application. The left sidebar contains a search bar and a list of report categories: 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 the 'FY 2023 SSM Outcomes' report. At the top of the report, it says '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 buttons: 'Visualize', a download icon, and 'Export to Excel'. The 'Export to Excel' button is highlighted with a red box. In the bottom left corner of the application, there is a button labeled 'Export Data Explorer...xlsx' which is also highlighted with a red box. The bottom right corner of the application has a 'Show all' button and a close icon.

OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

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 or improved. Improved (“better”) employment is defined as an increase in salary, increase in status, increase in hours, or more benefits.


To enter an Employment Assessment:

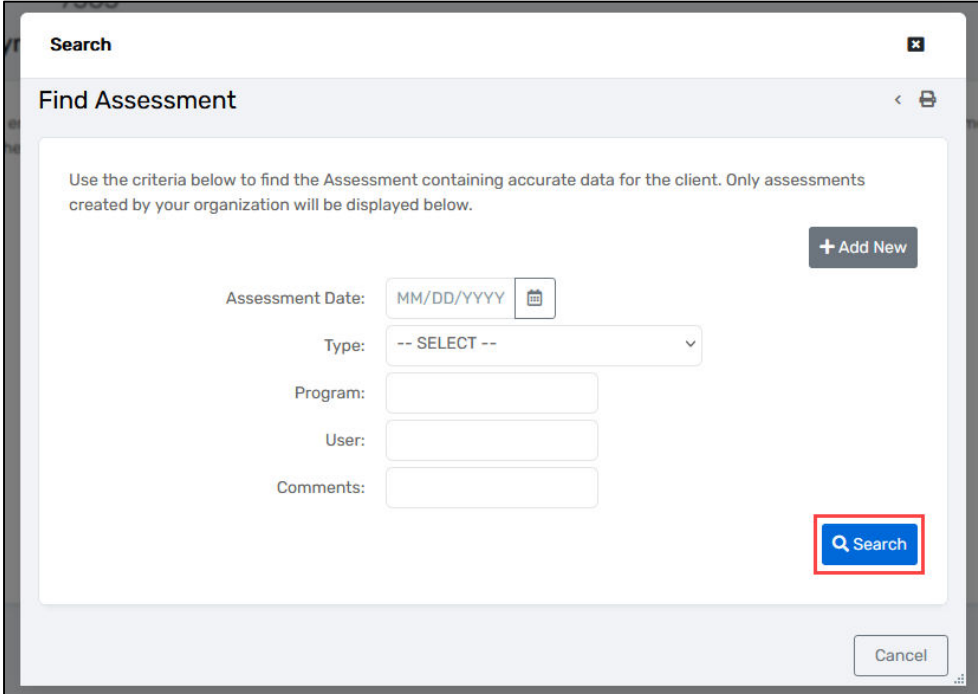
➤ Ensure you are in the correct workgroup (**PBC – CSD SOFI**)

➤ 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, if your program enrollment label does not appear at the top of the page, then you must 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 your client.



OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

To enter an Employment Assessment (cont.):

- For the remainder of the page, complete all the required fields; depending on the options selected from the drop down for the question titled “Employed”, additional questions will appear.
- Complete each of the questions and press ‘Save’ at the bottom of the page to complete entry

Search

Clients / Employment Assessments / HMIS 2017 Employment Assessment

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

Financial Assessments

Enrollments and Services

RHY Assessments

Joeey Test
3/4/1988 Male
Client ID 561-123-7777
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.

Default Client's Last Assessment

Assessment:
No Assessment Selected

Assessment Date: * MM/DD/YYYY

Assessment Time Frame: * -- SELECT --

Employed? * -- SELECT --

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

Save Cancel

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
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: **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.):

- The following screen will populate the results for the Enrollment types (i.e. entry, exit, during program enrollment/update). Choose the appropriate program and enrollment type.
- 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 561-123-7777 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:

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 "FY 2023 Employment"
 - Look for the report created by Stessy Cocerez on 3/28/2023 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 sidebar, 'Data Explorer' is highlighted. The main area displays a modal titled 'Open Saved Question'. Inside the modal, there is a search bar containing 'FY 2023 Employment' and a 'Search' button. Below the search bar is an unchecked checkbox labeled 'Only show my questions'. A table lists the search results:

Question Name	User	Date Created
FY 2023 Employment Assessments	Stessy Cocerez	3/28/2023

A tooltip 'Copy and edit this question' is visible over a double paper icon in the first row of the table. 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

The screenshot displays the Data Explorer application interface. On the left is a sidebar with a search bar and a list of folders including 'Data Explorer', 'Files on Server', 'HMIS Exports', 'HMIS Reports', 'Administrative Reports', 'Client Reports', 'Enrollment Reports', 'Referral Reports', and 'Service Reports'. The main content area shows a report titled 'FY 2023 Employment Assessments'. Above the report title are buttons for 'Visualize', 'Download' (highlighted with a red box), and 'Close'. Below the title is a table with the following columns: 'Created ...', 'Program', 'Case ID', 'Client ID', 'Enroll Da...', 'Exit Date', 'Assessm...', 'Assessm...', 'Assessm...', 'Assessm...', 'ClientID', 'Did the cl...', 'Employee...', and 'How did t...'. At the bottom left, a file named 'Export Data Explor....xlsx' is shown (highlighted with a red box). At the bottom right, there is a 'Show all' button and a close icon.

OUTCOME ENTRY & REPORTING: Homelessness

Individuals exit to Permanent Housing destinations

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 visible at the top, including their name, gender (Male), and Client ID (7565). Below this, the '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, showing various actions 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
	1	09/13/2022				No
er (Services Only)	1	06/01/2022				No

OUTCOME ENTRY & REPORTING: Homelessness

Individuals exit to Permanent Housing destinations

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' for a client named 'Joey Test' (Client ID 7565, DOB 3/4/1988, Male). The form is titled 'To exit the client from the Enrollment, enter the Exit Date and Destination.' 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 of the form is a blue 'Save' button. The sidebar on the left includes a search bar and a list of navigation items: 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.

OUTCOME ENTRY & REPORTING: Homelessness

Individuals exit to Permanent Housing destinations

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'

Search

HMIS Active Client List

1 of 2

Excel

Excel Data

PDF

Word

Excel Data

ClientTrack™

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: Homelessness

Individuals do not return to homelessness

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 shows the ClientTrack interface for a client named Joey Test. The client's profile information is visible at the top, including their name, gender (Male), client ID (7565), and ethnicity (Hispanic/Latin(a)(o)(x)). Below this, the 'Enrollments' section displays 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. An action dropdown menu is open for the first enrollment, 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', 'Review Entry Assessments', and 'Delete Enrollment'. The 'Exit the Enrollment' option is highlighted.

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
ter (Services Only)	1	06/01/2022				No

OUTCOME ENTRY & REPORTING: Homelessness

Individuals do not return to homelessness

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 light blue and displays the 'HUD Program Exit' form for a client named 'Joey Test' (Client ID 7565, DOB 3/4/1988, Male). The form is titled 'Enrollment Exit' and includes a 'Pause' button and a 'Cancel' button. The form fields are as follows:

- 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 of the form is a blue 'Save' button. The bottom of the sidebar shows a 'Financial' tab and a 'javascriptvoid(0);' error message.

OUTCOME ENTRY & REPORTING: Homelessness

Individuals do not return to homelessness

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

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

HMIS 2022 System Performance Measures Report

10/1/2024 to 9/30/2025

Report Criteria:

The following criteria have been utilized to filter the data. Data from other organizations or programs may be utilized for comparison data.

Organizations:

Programs:

CoC: No Filtering on CoC

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

FileHomeInsertPage LayoutFormulasDataReviewViewFoxit PDFTell me what you want to do...Stessy CocerezShare

L28

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		
2		10/22/2019	3/7/2023	Staying or living with family, permanent tenure	Exit was from PH	50	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		
4		10/22/2019	3/7/2023	Staying or living with family, permanent tenure	Exit was from PH	50	0	0	0		
5		11/15/2019	10/23/2022	Rental by client, no ongoing housing subsidy	Exit was from PH	50	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		
7		11/15/2019	10/27/2022	Rental by client, no ongoing housing subsidy	Exit was from PH	50	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		

Measure2

Ready

OUTCOME ENTRY & REPORTING: Homelessness

Individuals remain in, or exit, to Permanent Housing locations

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, date of birth (3/4/1988), 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, 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

Individuals remain in, or exit, to Permanent Housing locations

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 software interface for managing client data. On the left is a dark blue sidebar with navigation icons and a search bar. The main area is titled 'HUD Program Exit' and shows client information for 'Joey Test' (Male, Client ID 7565, DOB 3/4/1988). The workflow is in the 'Enrollment Exit' stage. A modal form is open with 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] (with an information icon)

At the bottom right of the modal is a blue 'Save' button. The sidebar on the left includes options like 'Dashboard', 'Find Client', 'Intake - Self Sufficiency', 'COVID-19 Intake', 'Client Profile', 'Family & Contacts', 'Common Assessments' (with sub-items: Domestic Violence, Barriers, Master Assessments, Employment, Education - Adult, Education - Child), and 'Financial'.

OUTCOME ENTRY & REPORTING: Homelessness

Individuals remain in, or exit, to Permanent Housing locations

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 shows the ClientTrack interface for the 'HMIS Active Client List' report. The left sidebar contains a navigation menu with 'BNLs' expanded, showing 'HMIS BNL Veterans' and 'HMIS Active Client List'. The main panel displays the report title 'HMIS Active Client - By Name List' and the report range '4/1/2023 to 4/30/2023'. A dropdown menu is open from the save icon, showing options: Excel, Excel Data (highlighted), PDF, and Word. The report criteria section shows 'Report Type: Active at any point' and 'Active Client Filter: Report Glossary Active Client'. The bottom of the screen shows the start of a table with columns: Client ID, Client Name, SSN, Age, Gender, Race, Ethnicity, and Veteran Status.

Client ID	Client Name	SSN	Age	Gender	Race	Ethnicity	Veteran Status
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OUTCOME ENTRY & REPORTING: Homelessness

Individuals maintain their Permanent housing 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 includes: Name: Joey Test, Date of Birth: 3/4/1988, Gender: Male, Client ID: 7565, Ethnicity: Hispanic/Latin(a)(o)(x), and Race: Black, African American, or African. The 'Enrollments' section shows a table with columns: Case Members, Enroll Date, Exit Date, Case Manager, Organization, and Acuity List Detail?.

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	1	06/01/2022				No
View Case Members						
Update/Annual Assessment						
Link Assessments						
Associated Assessments						
Exit the Enrollment						

The 'Exit the Enrollment' option is highlighted in blue at the bottom of the dropdown menu.

OUTCOME ENTRY & REPORTING: Homelessness

Individuals maintain their Permanent housing after receiving financial assistance

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' for a client named 'Joey Test' (Client ID 7565, Male, DOB 3/4/1988). The form includes fields for 'Exit Date' (04/24/2023), 'Destination' (Staying or living with family, permanent tenure), and 'Exit Reason' (Completed Program). It also shows 'Case Manager Assignment' as 'Stessy Cocerez' and 'End Case Assignment' as checked. A 'Save' button is 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

Individuals maintain their Permanent housing after receiving financial assistance

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 search bar and a list of report categories: Data Explorer, Files on Server, My Saved Reports, BNLs (expanded), HMIS BNL Veterans, HMIS Active Client List (selected), HMIS Exports, HMIS Reports, Administrative Reports, Client Reports, Enrollment Reports, Referral Reports, and Service Reports. 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, the 'Report Criteria' section shows '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, and another red box highlights the 'Excel Data' option in the dropdown menu that appears when the 'Save' icon is clicked.

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 Behavioral Health Assessment (BHA)


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

To complete the Behavioral Health 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 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 Behavioral Health Assessment (BHA)

To complete the Behavioral Health Assessment (cont.):

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

The screenshot shows the 'Behavioral Health' assessment form for a client named Joey Test. The form is part of a larger client profile view. The left sidebar contains navigation links for COVID-19 Intake, Client Profile, Family & Contacts, Common Assessments (Domestic Violence, Barriers, Master Assessments, Employment, Education - Adult, Education - Child, Financial Assessments), and Behavioral Health. The main content area displays the client's information and the assessment form. The form fields are: Program (dropdown menu), Assessment Date (calendar icon), Assessment Type (dropdown menu), Baseline Or Followup (dropdown menu), Score (text input), and Total Change (text input). A red box highlights the Program, Assessment Date, Assessment Type, Baseline Or Followup, Score, and Total Change fields. The 'Save' button is also highlighted with a red box.

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 Behavioral Health Assessment (BHA)

To run a report for the Behavioral Health 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 (by SCocerez created on 4/24/2023); 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.

The screenshot shows the 'Data Explorer' interface with the following sections:

- Left Panel:** A sidebar with a 'Data Explorer' header and a list of report categories: Files on Server, HMIS Exports, HMIS Reports, Administrative Reports, Client Reports, Enrollment Reports, Referral Reports, and Service Reports.
- Main Panel:**
 - Report Title:** BH Assessments and Client Demos
 - What interests you today?:** A section with three dropdown menus: Enrollment (set to Client), Client (set to Behavioral Health), and Client Assessment (set to Client Assessment).
 - What do you want to know?:** A section with a grid of buttons for various 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?:** A section with a filter builder. It shows three filters:
 - and Program = Program Name
 - and Assessment Date >= '10/01/2022'
 - and Assessment Date <= '09/30/2023'
 There are '+' and '-' buttons to add or remove filters, and a 'Reset Filters' button.
 - Buttons:** 'Start Over' and 'Show Me' buttons are at the bottom.

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 Behavioral Health Assessment (BHA)

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

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

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	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	DIA	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	

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 CFARS/FARS from their baseline score at admission within the fiscal year

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

To complete the CFARS/FARS 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 search bar and a list of navigation options. The 'Common Assessments' option is highlighted with a red box, and the 'Behavioral Health' option is also highlighted with a red box. The main content area shows the client's dashboard, including a header with the client's name, gender, and client ID, and a section titled 'Joey Test's Information' with fields for Name, Birth Date, Age, Gender, Ethnicity, and Race. Below this is a section titled 'Joey's Enrollments' showing 8 results found.

Client Information:

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

Enrollments: 8 results found.

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 CFARS/FARS from their baseline score at admission within the fiscal year

To complete the CFARS/FARS (cont.):

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

The screenshot shows a web application interface for entering behavioral health assessments. The top navigation bar includes a search bar and a breadcrumb trail: Clients / BHA Overview / Behavioral Health. The client profile for 'Joey Test' (3/4/1988, Male, Client ID 7565) is displayed at the top. The main form area is titled 'Behavioral Health' and contains the following fields:

- Program: * -- SELECT -- (dropdown menu)
- Assessment Date: * MM/DD/YYYY (text input with a calendar icon)
- Assessment Type: * -- SELECT -- (dropdown menu)
- Baseline Or Followup: * -- SELECT -- (dropdown menu)
- Score: * (text input)
- Total Change: (text input)

A red box highlights the Program, Assessment Date, Assessment Type, Baseline Or Followup, Score, and Total Change fields. At the bottom right, there is a 'Save' button (with a checkmark icon) and a 'Cancel' button. The 'Save' button is also highlighted with a red box.

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 CFARS/FARS from their baseline score at admission within the fiscal year

To run a report for the CFARS/FARS:

- 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 (by SCocerez created on 4/24/2023); 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.

Data Explorer

Files on Server

- HMIS Exports
- HMIS Reports
- Administrative Reports
- Client Reports
- Enrollment Reports
- Referral Reports
- Service Reports

BH Assessments and Client Demos

What interests you today?

Enrollment Client Behavioral Health Client Assessment

What do you want to know?

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 Living Situation

Which records do you want to include?

and Program = Program Name + x

and Assessment Date >= '10/01/2022'

and Assessment Date <= '09/30/2023' + x

Start Over Reset Filters Show Me

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 CFARS/FARS from their baseline score at admission within the fiscal year

To run a report for the CFARS/FARS (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

	E	F	G	H	P	Q	R	S	T	U	V
	Enroll Date	Exit Date	Destination at Exit	Still Enrolled	Assessment	Assessment Date	Baseline or Follow Up	Score	Total Change	Living Situation	
1	6/15/2022	1/17/2023	Data not collected	No	CFARS	1/17/2023	Followup	21	-7		
2	6/15/2022	1/17/2023	Data not collected	No	CFARS	1/17/2023	Followup	21	-7		
3	6/15/2022	1/17/2023	Data not collected	No	CFARS	1/17/2023	Followup	21	-7		
4	6/15/2022	1/17/2023	Data not collected	No	CFARS	1/17/2023	Followup	21	-7		
5	6/15/2022	1/17/2023	Data not collected	No	CFARS	1/17/2023	Followup	21	-7		
6	6/15/2022	1/17/2023	Data not collected	No	CFARS	1/17/2023	Followup	21	-7		
7	6/15/2022	1/17/2023	Data not collected	No	CFARS	1/17/2023	Followup	21	-7		
8	1/21/2022	10/18/2022	Data not collected	No	CFARS	10/18/2022	Followup	30	-8		
9	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
10	10/1/2021		Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
11	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
12	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
13	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
14	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
15	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
16	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
17	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
18	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
19	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
20	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
21	7/18/2022	3/16/2023	Data not collected	No	CFARS	3/16/2023	Followup	29	-33		
22	10/19/2022			Yes	CFARS	10/26/2022	Baseline	58			
23	5/18/2022	3/3/2023	Data not collected	No	CFARS	3/3/2023	Followup	24	-16		
24	3/7/2023			Yes	CFARS	3/7/2023	Baseline	63		Data not collected	
25	1/25/2022	2/27/2023	Data not collected	No	CFARS	2/27/2023	Followup	18	-10		
26	3/5/2023			Yes	CFARS	3/21/2023	Baseline	48		Data not collected	
27	6/15/2022	2/24/2023	Data not collected	No	CFARS	2/24/2023	Followup	20	-7		
28	10/7/2022	3/10/2023	Data not collected	No	CFARS	11/7/2022	Baseline	26			
29	10/7/2022	3/10/2023	Data not collected	No	CFARS	3/10/2023	Followup	21	-5		
30	10/7/2022	3/10/2023	Data not collected	No	CFARS	10/25/2022	Baseline	27			

OUTCOME ENTRY & REPORTING: Behavioral Health

Program participants (families or youth) will receive a warm transfer to supportive services based on their designated plan during the fiscal year

This outcome is based on services (*see section on how to enter services*). 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'

The screenshot shows the 'Service Summary Report' form in the CT system. The left sidebar contains a navigation menu with 'Service Reports' expanded, showing 'Service Summary' as the selected option. The main form area is titled 'Service Summary Report' and includes the following sections:

- Date Range:** A section for indicating the time period for the report. It includes a 'Predefined Date Range' dropdown set to 'Current Month' and a 'Service Date Between' field with a date range of 04/01/2023 to 04/30/2023.
- Organization(s):** A section for indicating which organizations should be included in the report. It includes a dropdown menu with the following options: Adopt-A-Family of the Palm Beaches, Inc., American Association of Caregiving Youth, Boys Town South Florida, Center for Child Counseling, and Center for Family Services of BPP, Inc. The 'Adopt-A-Family of the Palm Beaches, Inc.' option is selected.
- Program(s):** A section for checking the box to limit report results by selected programs. It includes a checkbox labeled 'Filter by Program(s)' which is checked.

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

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

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’

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

Ethnicity: Hispanic/Latin(a)(o)(x) Race: Black, African American, or African

Joey's Enrollments

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	09/13/2022		Randy Paul	Palm Beach County BCC - Lead	No
Exit the Enrollment	1	06/01/2022		Keianna Pierre Louis	Palm Beach County BCC - Lead	No

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

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. The left sidebar contains 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 'HUD Program Exit' form for a client named 'Joey Test' (Male, 3/4/1988, Client ID 7565). The form is titled 'Enrollment Exit' and includes fields for 'Exit Date' (04/24/2023), 'Destination' (Staying or living with family, permanent tenure), and 'Exit Reason' (Completed Program). It also shows 'Case Manager Assignment' (Stessy Cocerez) and 'End Case Assignment' (checked). A 'Save' button is located 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: Stessy Cocerez

End Case Assignment: ☒

Save

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

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'

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 PBC, 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**

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.

Please submit Quarter Reports to your assigned SPRE team member and CC the CSD-ContractsManager email (CSD-ContactsManager@pbcgov.org). Questions can also be directed to this email.

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.

Thank you