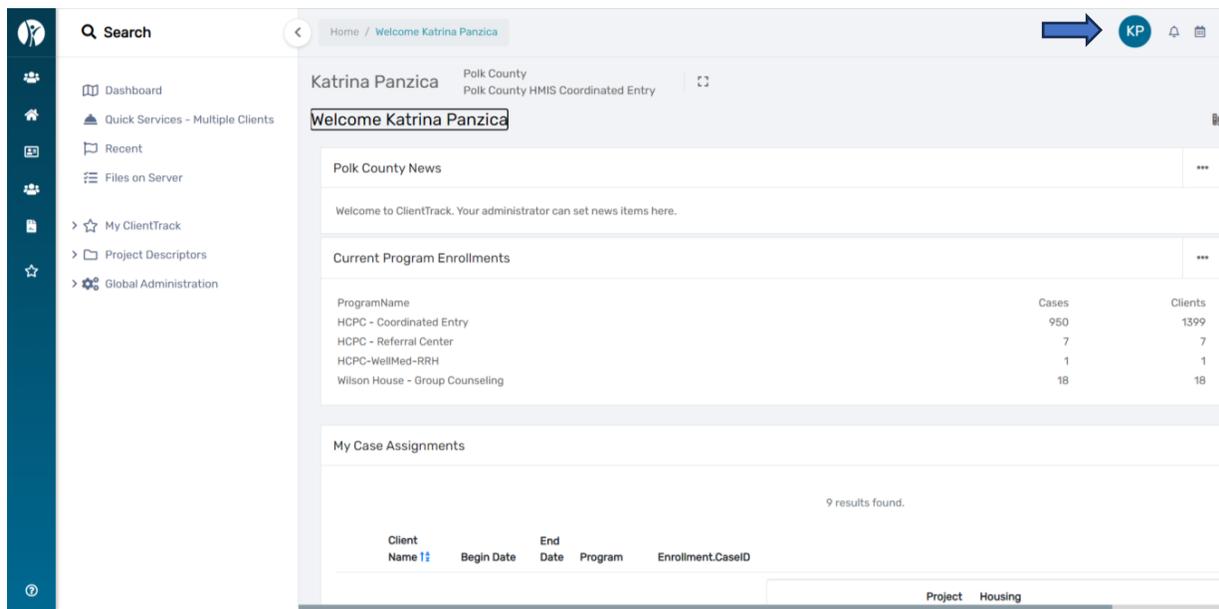


## ClientTrack Coordinated Entry Workflow SOP

First, locate your **user icon**. Selecting your User Icon will open a menu from which you can change your Workgroup.

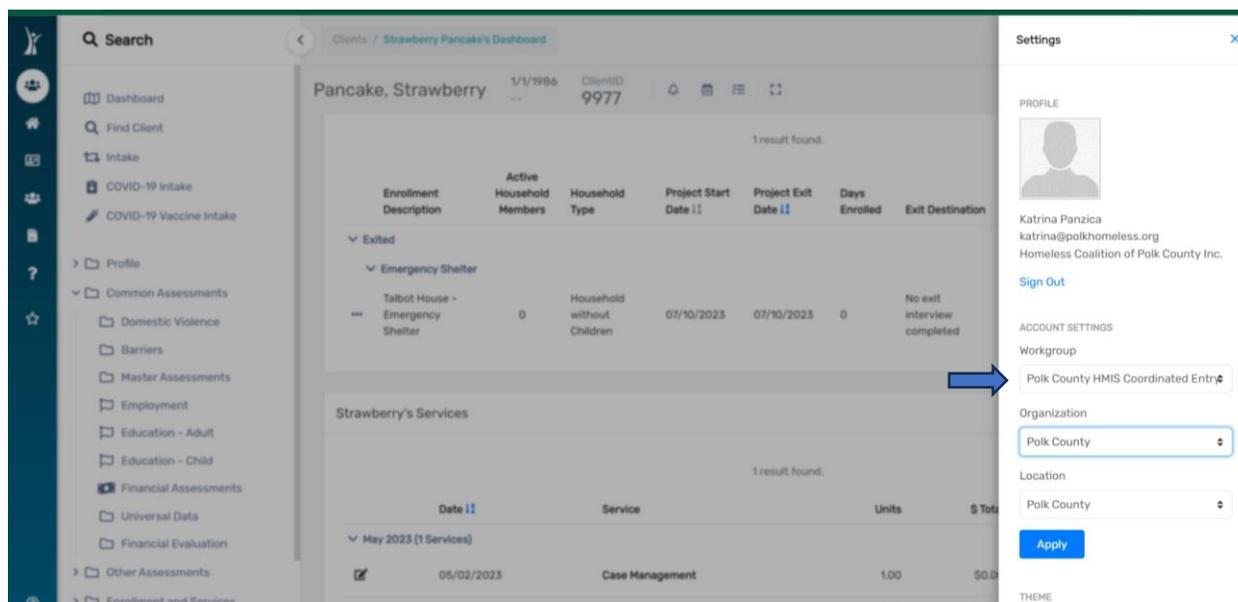


The screenshot shows the ClientTrack dashboard for Katrina Panzica. The user icon 'KP' is highlighted with a blue arrow in the top right corner. The dashboard displays the following information:

- Polk County News:** Welcome to ClientTrack. Your administrator can set news items here.
- Current Program Enrollments:**

ProgramName	Cases	Clients
HCPC - Coordinated Entry	950	1399
HCPC - Referral Center	7	7
HCPC-WellMed-RRH	1	1
Wilson House - Group Counseling	18	18
- My Case Assignments:** 9 results found.

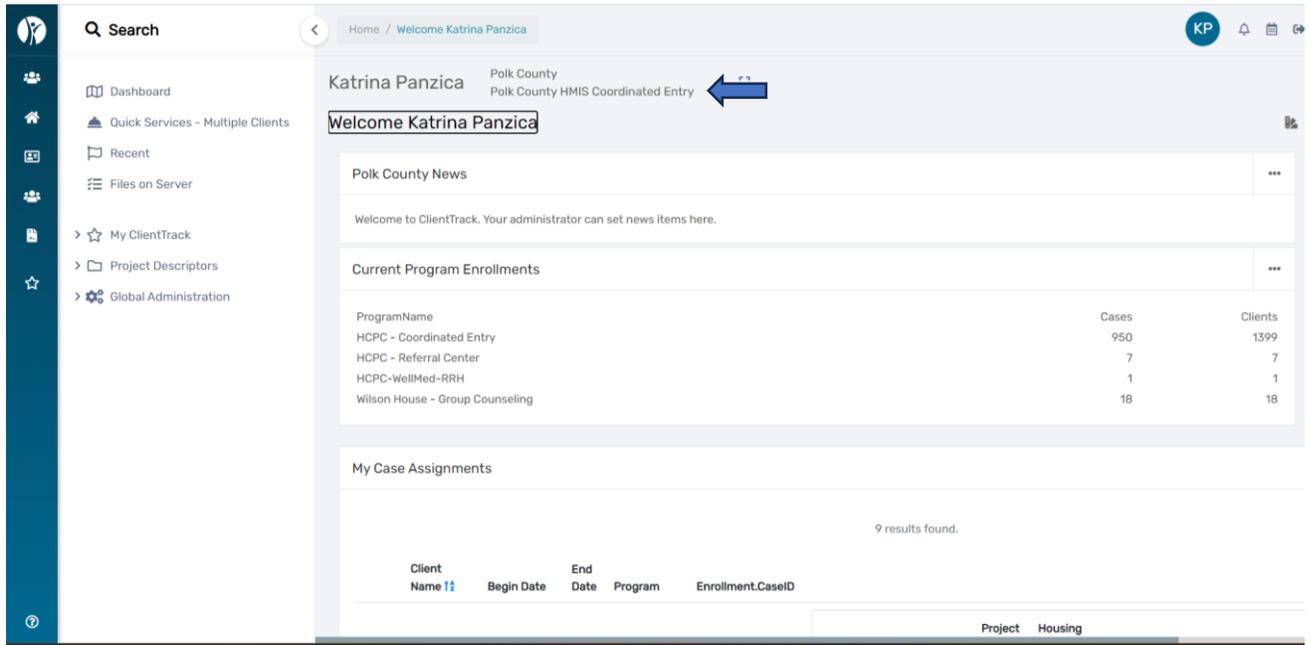
You will want to make sure your workgroup is selected Polk County HMIS Coordinated Entry to continue with the correct Coordinated Entry workflow.



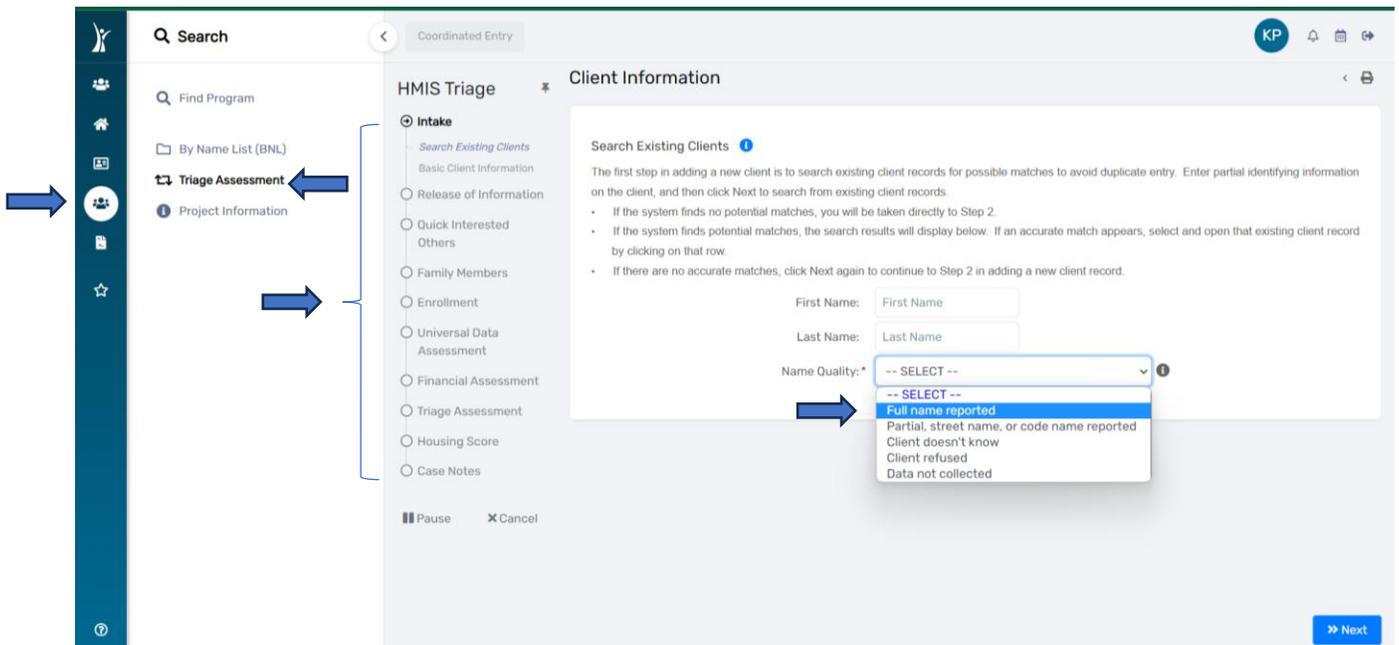
The screenshot shows the ClientTrack settings page for Katrina Panzica. The 'Workgroup' dropdown menu is open, and 'Polk County HMIS Coordinated Entry' is selected, indicated by a blue arrow. The settings page includes the following information:

- PROFILE:** Katrina Panzica, katrina@polkhomeless.org, Homeless Coalition of Polk County Inc. Sign Out
- ACCOUNT SETTINGS:**
  - Workgroup: Polk County HMIS Coordinated Entry
  - Organization: Polk County
  - Location: Polk County

You can verify that you are in the correct workgroup also by visiting the **Home** section on the blue Main Menu ribbon.



Next, please select the **Coordinated Entry** section on the blue Main Menu ribbon. After selecting the coordinate entry section, you will select **Triage Assessment**. This will then display the correct Coordinated Entry workflow.



If the individual is not currently enrolled into the HCPC- Coordinated Entry project but is a client in ClientTrack then the view below is what you will encounter. Continue to identify and select the correct client. Once the correct client is selected the workflow will continue to the next needed section to be completed.

**Client Information**

Please address the following:

- Please review the list below for potential duplicates. Click *Next* if this is not a duplicate.

**Search Existing Clients**

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

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

First Name:   
 Last Name:   
 Name Quality:

1 result found.

First Name	Last Name	Find Duplicate Client
Strawberry	Pancake	9977

Next

If the individual is not already a HMIS client, then your view will look as it does below. Continue to complete the **Basic Client Demographics**.

**Client Information**

**Basic Client Information**

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

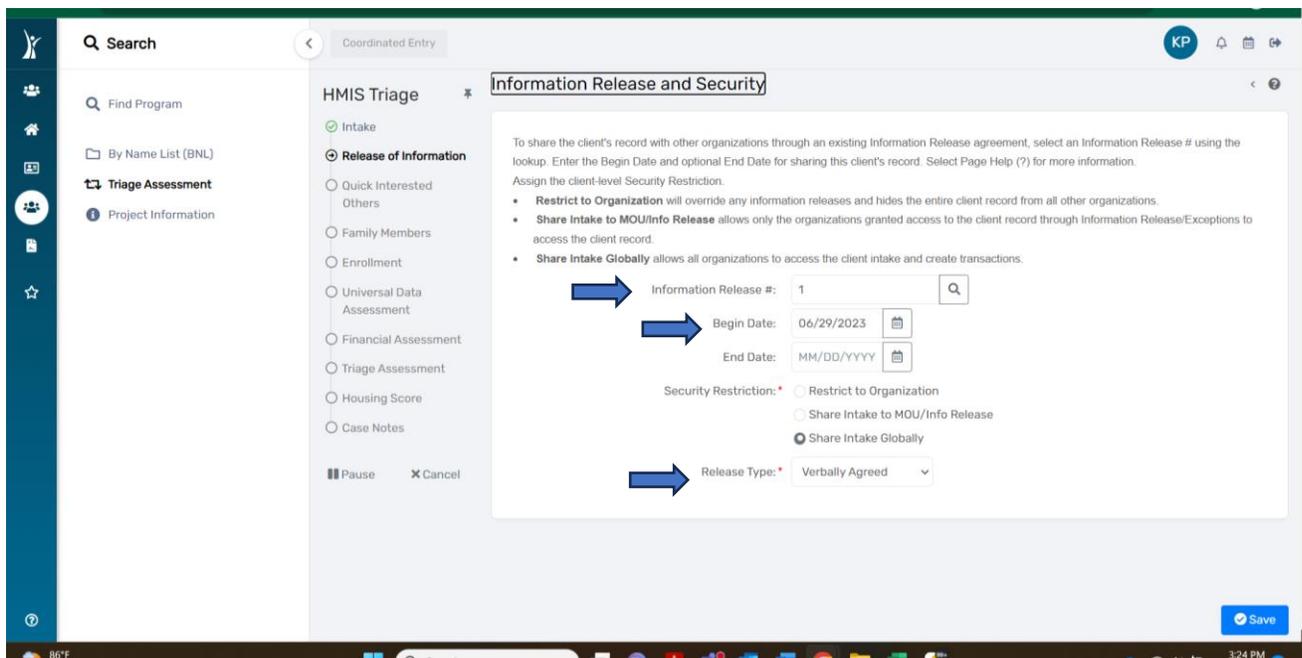
First Name:   
 Last Name:   
 Middle Name:   
 Name Quality:   
 Social Security Number:   
 SSN Quality:

**Basic Client Demographics**

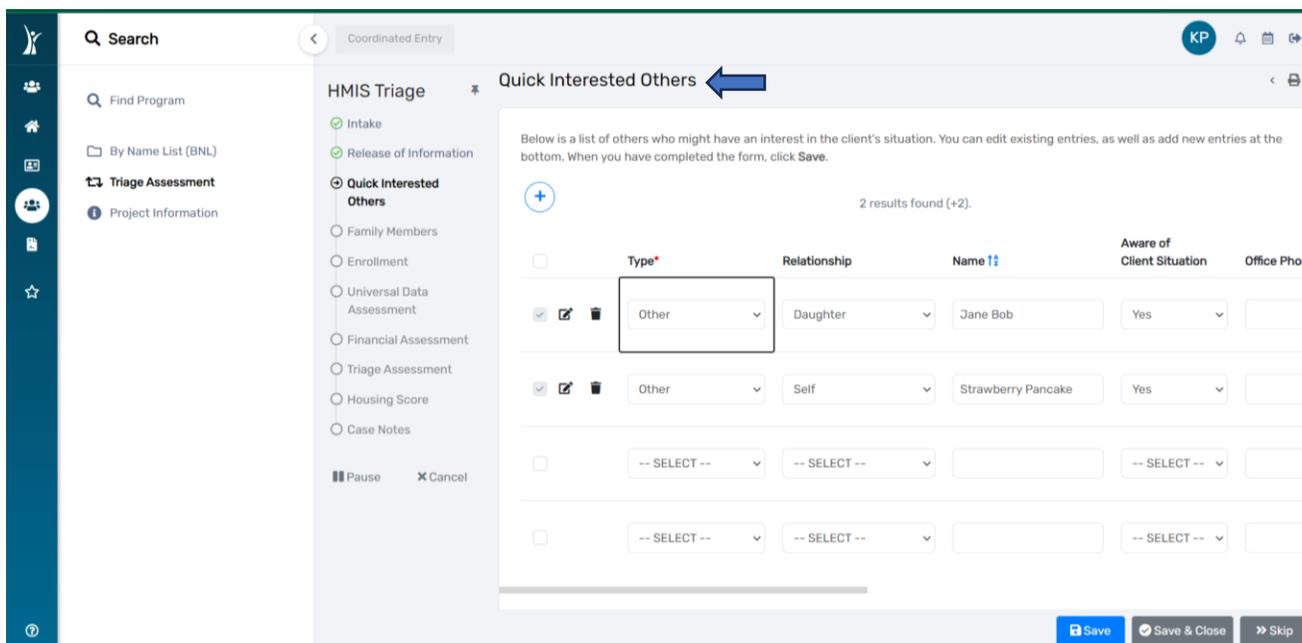
Date of Birth:   
 Date of Birth:

Previous Full Edit Form Finish

Next, you will see the Release of Information section. Always leave the Information Release # as “1”. Please provide a begin date **ONLY** and do not put an end date. Leave the select **Share Intake Globally** and select the Release Type.



Next the workflow will bring you to **Interested Others**. You will utilize this to add any individuals who are allowed to speak, leave messages with, and provide updates about the head of the household’s case. If the client does not wish to provide that information or does not allow anyone to check on their case, then please select the skip button at the bottom of the page.



Next, the workflow will bring you to **Family Members**. Please list all family members who are planned to be apart of the household.

The screenshot shows the 'Family Members' section of the ClientTrack Coordinated Entry Workflow. The interface includes a search bar, a sidebar with navigation options, and a main content area with a 'Family Members' tab. A blue arrow points to the 'Family Members' tab. The main content area displays a list of family members with columns for First Name, Middle Name, Last Name, Suffix, and Name Quality. The list includes Strawberry Pancake and Raspberry Pancake. A blue arrow points to the 'Family Members' tab.

First Name*	Middle Name	Last Name*	Suffix	Name Quality*
Strawberry		Pancake		Full name reported
Raspberry		Pancake		Full name reported

Next, the workflow will bring you to the **Enrollment** section. You will check all of the family members who will be enrolled with the head of household and select the project HCPC-Coordinated Entry. If any member of the household is already enrolled into a HCPC-Coordinated Entry, it will not allow you to select that individual to enroll into the household.

The screenshot shows the 'Enrollment' section of the ClientTrack Coordinated Entry Workflow. The interface includes a search bar, a sidebar with navigation options, and a main content area with an 'Enrollment' tab. A blue arrow points to the 'Enrollment' tab. The main content area displays a list of household members with columns for Name, Gender, Age, Project Start Date, Exit Date, and Case Manager. The list includes Pancake, Strawberry and Pancake, Raspberry. A blue arrow points to the 'Enrollment' tab.

Name	Gender	Age	Project Start Date	Exit Date	Case Manager
Pancake, Strawberry	Female	37	07/19/2023	MM/DD/YYYY	Katrina Panzica
Pancake, Raspberry	Transgender	22	07/19/2023	MM/DD/YYYY	Katrina Panzica

Next, the workflow will bring you to **Universal Data Assessment**. This is HUD data standards and is needed for reporting purposes to HUD.

Complete the information below related to the selected client's housing status and other relevant information.

**Note:**

- Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data.
- Changing any project setup data with existing enrollments may affect or break the logic for 3.917.
- 3.917 may not always show as expected because of changed setup data or missing required data links

**Assessment Active**

Default Client's Last Assessment ⓘ

Assessment Date: 07/19/2023 📅

Age at Assessment: 37

Assessment Type: Entry ▾

Disabling Condition: -- SELECT -- ▾

**Living Situation**

Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.

Prior: -- SELECT -- ▾

Living: 📍

Save

Next, the workflow will bring you to the **Financial Assessment**.

**Income and Sources, Non-Cash Benefits**

- When a client has income, but does not know the exact amount, a "Yes" response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.
- Income received by or on behalf of a minor child should be recorded as part of household income under the Head of Household, unless the federal funder in the HMIS Program Specific Manual instructs otherwise. Income should be recorded at the client-level for heads of household and adult household members. Projects may choose to collect this information for all household members including minor children, as long as this does not interfere with accurate reporting per funder requirements. Projects collecting data through client interviews should ask clients whether they receive income from each of the sources listed rather than asking them to state the sources of income they receive.
- Income data should be recorded only for sources of income that are current as of the information date (i.e. have not been specifically terminated). As an example, if a client's employment has been terminated and the client has not yet secured additional employment, the response for Earned income would be "No." As a further example, if a client's most recent paycheck was 2 weeks ago from a job in which the client was working full time for \$15.00/hour, but the client is currently working 20 hours per week for \$12.00 an hour, record the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour).

Default Last Assessment

**Assessment Active**

Assessment Date: 07/19/2023 📅

Income from Any Source: -- SELECT -- ⓘ ▾

Non-Cash Benefits from Any Source: -- SELECT -- ⓘ ▾

Expenses: -- SELECT -- ⓘ ▾

Save and Close

Next, the workflow will bring you to the **Triage Assessment** where *current living situation*, *homelessness category*, and *domestic violence* questions will be asked. Prioritization Status will be *Placed on prioritization list*.

The screenshot displays the 'HMIS Triage Assessment' form within a web application interface. The form is titled 'HMIS Triage Assessment' and includes a navigation sidebar on the left with options like 'Intake', 'Release of Information', 'Quick Interested Others', 'Family Members', 'Enrollment', 'Universal Data Assessment', 'Financial Assessment', 'Triage Assessment', 'Housing Score', and 'Case Notes'. The main form area contains the following fields:

- Assessment Date: 07/19/2023 (with a calendar icon)
- Assessment Level: Housing Needs Assessment (dropdown)
- Assessment Location: -- SELECT -- (dropdown)
- Assessment Contact Type: -- SELECT -- (dropdown)
- What is your household type: Household without children (dropdown)
- Information Date: 07/19/2023 (with a calendar icon)
- Enrollment: 07/19/2023 - HCPC - Coordinated Entry (dropdown)
- Verified by Project: -- SELECT -- (dropdown)
- Current Living Situation Information: -- SELECT -- (dropdown)
- Current Living Situation: -- SELECT -- (dropdown)

Below the form, the 'Prioritization Status' dropdown menu is set to 'Placed on prioritization list'. A blue arrow points to this dropdown. A 'Save' button is located at the bottom right of the form area.

Next, the workflow will bring you to **Housing Score**. This is the housing assessment for coordinated entry. If the individual is a RRH client, please select *CE Assessment*. If the individual is a Prevention client, please utilize *Prevention Assessment*. This is found just after the 2 paragraphs of the Release of Information titled **Assessment Type**.

The screenshot shows the 'Housing Score' assessment form. The left sidebar lists various assessment steps, with 'Housing Score' selected. The main form area contains the following fields and text:

- Assessment Date:** 07/19/2023
- Default Last Assessment:** -- SELECT --
- Assessment Type:** CE Assessment
- Text:** Do you give consent that this agency may share information with other agencies such as, but not limited to, your situation, household demographics, and any questions asked during this assessment for the purpose of providing a referral to coordinated entry prioritization list? (If you would like a copy of the privacy notice or your rights we can provide that information at the end of the assessment) : -- SELECT --
- Text:** I understand that the information contained on this form is provided voluntarily. The information is true and correct to the best of my knowledge. If I provide any false information, I understand that services may be denied. I understand that the completion of this form does not guarantee that I will receive services.

Finally, you will complete a case note. Regarding will be titled: Assessment Note. Please include individuals' contact information and living situation along with any additional notes you may want to include. Example below:

The screenshot shows the 'Case Note with Services' form. The left sidebar lists various assessment steps, with 'Case Notes' selected. The main form area contains the following fields and text:

- Entry Date:** 07/19/2023
- User:** Katrina Panzica
- Regarding:** Assessment Note
- Note Type:** -- SELECT --
- Supervisor Review:** If a supervisor review is required, please check the box and select the name of the individual to make the assignment. Review Required:
- Template:** -- SELECT --
- Text:** 07/19/2023 Single female staying outside. MH yes. Income no. Explained CE process. KP/HCP
- Text:** SA: N  
MH: N  
Income: N  
Children: N  
Vet: N  
PoC: 863-123-4567 email: first.last@yahoo.com

This will be your view once the Coordinate Entry workflow is successfully completed. Select Finish and you are done!

