ClientTrack®
by eccovia

User Guide

Version 10.03.22

eccovia®

Table of Contents

Introduction	3
My ClientTrack	7
Working With Clients	15
Enrollments	19
Assessments	23
Barriers	28
Goals	32
Services	35
Referrals	42
Tasks	49
Case Notes	53
Additional Client Information	56
Family Functionalities	67
ClientTrack Calendars & Events	73
Reporting	85

Introduction

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Disclaimer

The information published in this document is intended to provide general instructions for using ClientTrack software as originally deployed in baseline form. Because of variations in how organizations may configure and use the software, there is no express guarantee that this guide will exhaustively cover all use cases. For questions beyond the scope of this manual, ClientTrack users should first contact the designated individual within their organization — often the System Administrator — who may then contact Eccovia Technical Support or an Account manager if additional support is needed.

About this Guide

This guide outlines information necessary for client-facing users to perform their day-to-day tasks in ClientTrack. The terminology and screenshots used in this guide are taking from ClientTrack's baseline functionality and the most recent version of ClientTrack. Configurations to your unique solution may mean that some menu options or forms are not covered in this guide.

Please note that this guide does not include information on the ClientTrack Designer Toolset (i.e. Forms Designer, Workflow Designer, etc.) utilized by Implementation Managers to modify the ClientTrack interface, forms, business rules, and workflows. For more on the Designer Toolset, please contact your Account Manager. A separate guide is available for authorized users of the Designer Toolset.

System Requirements

- Use a device with access to a modern web browser.
- ClientTrack is designed to run on the latest versions of Microsoft Edge, Google Chrome, and Firefox. To ensure smooth functioning of your solution, we recommend using one of these browsers. ClientTrack may not operate properly in other browsers such as Safari.
- Set your video display to 1024 x 768 or higher as certain pages in ClientTrack will not display properly in resolution less than this.

Technical Support

Eccovia is dedicated to helping you accomplish your mission. If you have questions that cannot be answered within this guide, other resources are available to you. These include the following:

Local System Administrators

Many organizations have an individual or team assigned to oversee and administer software needs. These local System Administrators should have received special training to answer questions or respond to any technical challenges that may come up within ClientTrack. Because local System Administrators understand the nuances of your services and are aware of any changes that may have been made locally to the software, you are encouraged to contact your local System Administrator as your first line of support.

Tool Tips

ClientTrack provides Tool Tips throughout the software. These tips can be seen by resting your cursor over the **Help** icon at the bottom left of your screen.

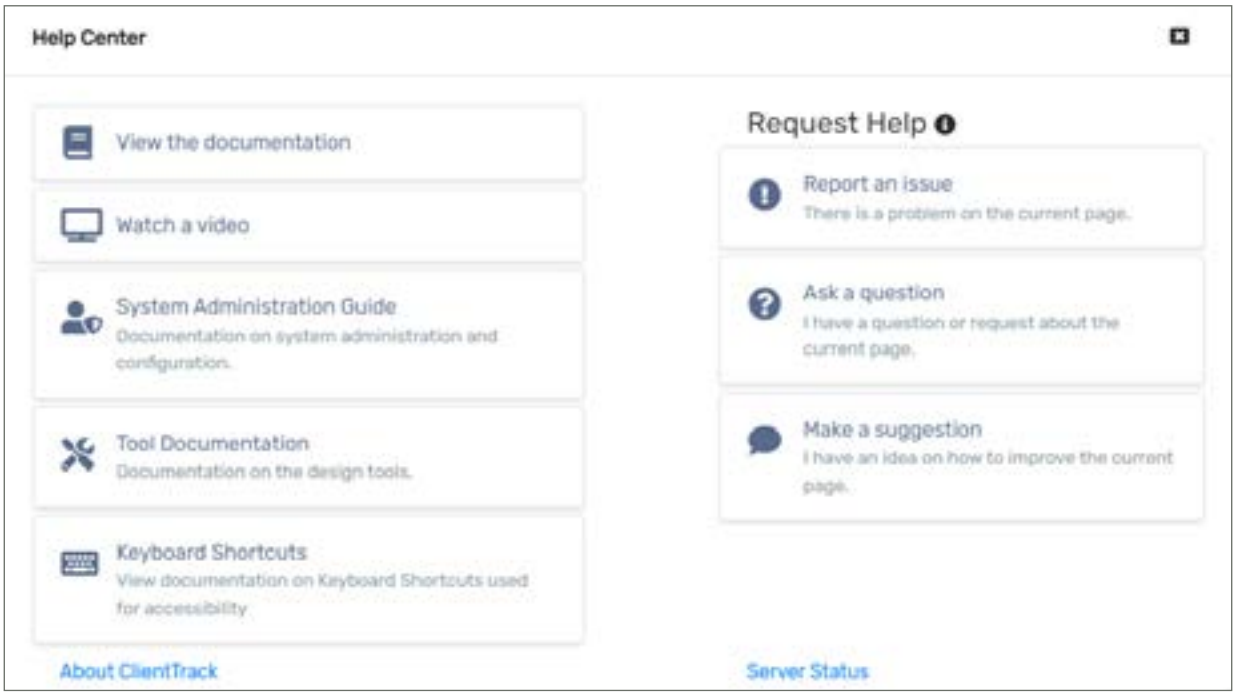
Reporting a Problem

ClientTrack's integrated ticketing system enables users to report issues, ask questions, and provide feedback. Users can access this feature through the **Help** button in each ClientTrack screen to submit tickets. Simply navigate to the relevant area of the application in which you are experiencing trouble and select Help in the top right-hand corner of your screen. A dialogue box will appear to help you resolve your problem. Once you click Report an issue, Ask a question, or Make a suggestion, you then complete basic information about your request, including a description, a screenshot, and contact information.

Tickets are initially submitted to the local system administrator, who will either resolve the issue or escalate it to the Eccovia Solutions Technical Support team. Tickets received by the Technical Support team are categorized into three tiers and are determined by issue severity, complexity, and priority. This allows the team to assign appropriate levels of support to diagnose and resolve the issue in a timely manner.

Any issue notes or status changes made by support staff are updated automatically and are visible to the local system administrator.

Additional Help menu options include '*View the Documentation*,' which will pull up a copy of this guide on your screen. Selecting '*Watch a Video*' will open a link to a training video on basic navigation. '*Tool Documentation*' shows you information on the design tools, and '*Keyboard Shortcuts*' demonstrate some combinations of keys you can use to perform a task that would normally require your mouse to navigate to.



My ClientTrack

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My ClientTrack

Changing Password and Adding a Security Question

ClientTrack is a web-based application. ClientTrack runs best on the latest versions of Chrome, Firefox, and Internet Explorer. ClientTrack can also be accessed via mobile device.

To login to ClientTrack:

- Navigate to the web address given to your specific solution (this changes with every instance).
- You will enter your **username**, which is your work email address.
- Enter the **password**. For the first login, you'll receive a temporary password from your system admin; you will then have to create a new password when you first log in.

A password must contain:

- At least 8 characters
- At least 1 capital letter
- At least 1 number
- At least 1 non-letter, non-number character

Never save your password using a browser. If you're unable to log in, reach out to your ClientTrack admin.

- Depending on your department/assignment/etc., choose the appropriate **Workgroup**, **Organization**, and **Location**.
- Select **Use these settings to log in**.

Changing Password and Adding a Security Question

When you first log in, you will be required to change your password and add a security question to protect your account and the data of the people your organization serves.

- Click your User icon in the top right corner of the screen. This will cause a small window to appear.
- In this window, under your profile picture and information, select **Change Password**.
- To change your password, fill out the fields marked by a red asterisk. Select **Change Password** at the bottom to save your new password.

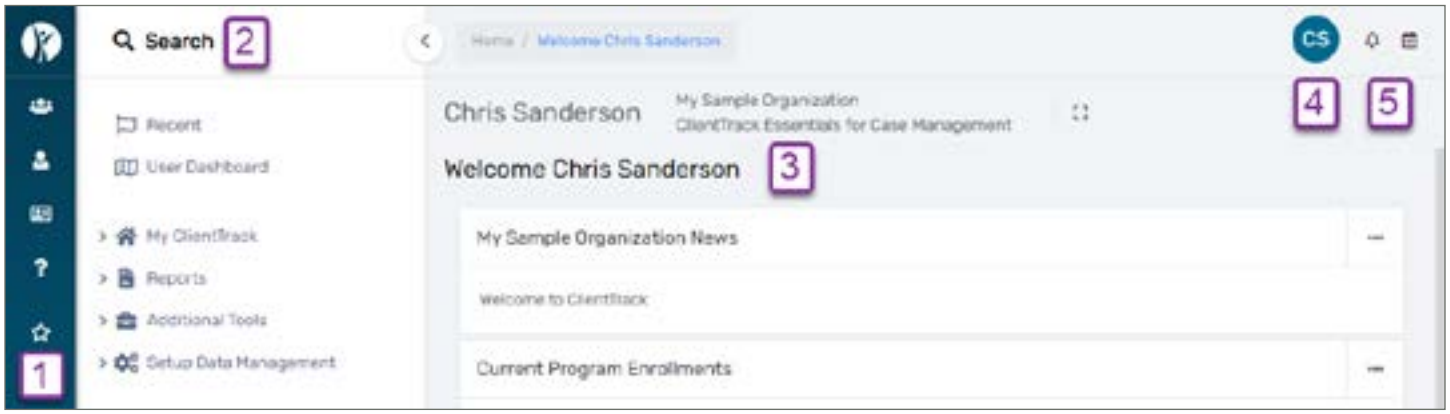
- To add a security question, select **Update my Recovery Information**.
- Under Security Question, select **Set**.
- You will then be prompted to type a question and an answer to the question.
- Select **Save** at the bottom of the screen.

Workspaces

When you first log in, you will be taken to the **Home** Workspace, identified in the top left of the screen.

Workspaces function similar to tabs on a web browser. Each Workspace will give you different Menu Groups and Options populated with the forms and functions relevant to the kind of work that Workspace is dedicated to. When you wish to work with Clients, including Client Intake, Assessment, etc., you will use the Client Workspace; when working with multiple Clients or running Reports, you will use the Home Workspace, and so forth.

Basic Navigation



Regardless of Workspace, the ClientTrack interface employs the following elements:

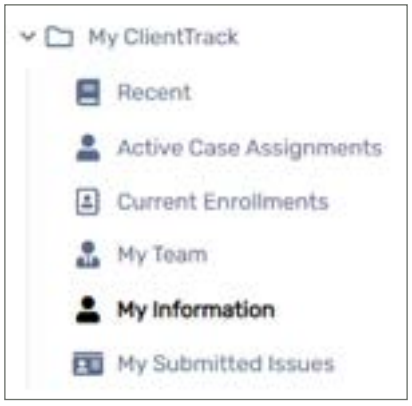
1. **Main Menu**
   This menu allows you to access multiple tools you may need. The ClientTrack logo at the top will bring you back to your Home.
2. **Global Search Bar**
   Searches both for data and Menu Options. Almost anything you will need can be navigated to from this search bar.
3. **Entity Information**
   Displays information about the Workspace you're currently viewing.
4. **User Icon**
   Selecting your User Icon will open a menu from which you can change your Workgroup, Organization, location, theme, and password.
5. **Notifications**
   You'll be alerted to new notifications here.

My Information

This Menu Option will allow you to edit your **Name**, **Email Address**, **Address**, **Phone Numbers**, **Provider**, and **Visual Theme**.

Navigation

Navigate to the **Home** Space and select the **My ClientTrack** Menu Group, followed by the **My User Configuration** Menu Group, then **My Information**.

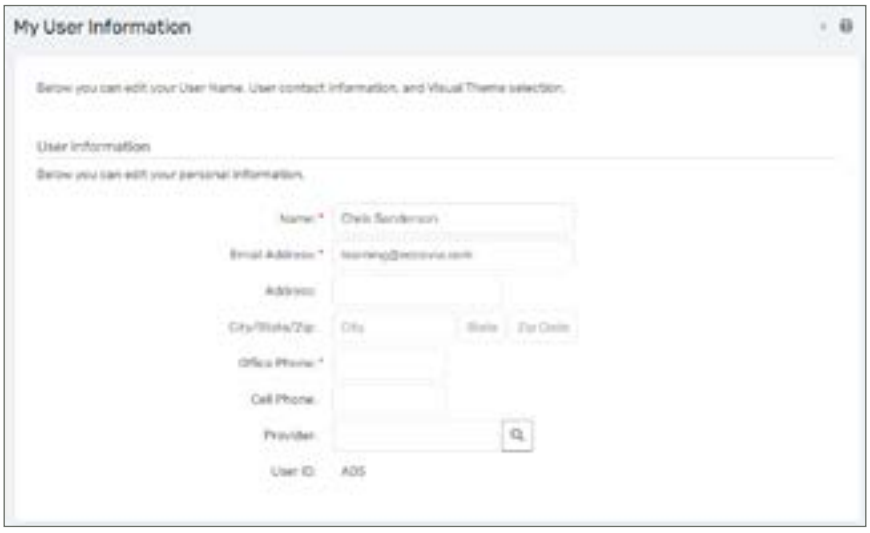


Editing User Information

1. After navigating to the **My Information** Menu Option, select the line on the User Information form that needs editing.

2. Edit the information in the field provided and select **Save**.

3. The User's information will now be updated.



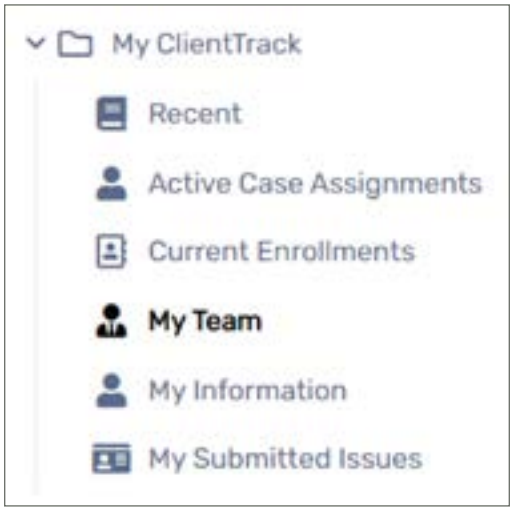
Please Note: A User's Email Address is also their Username used to log in to ClientTrack. Changing one will change the other.

My Team

The **My Team** functionality allows a User that has been assigned as another User's Supervisor to view that User's (or team member's) **Case Assignments**, **Calendar**, and **Paused Operations**. The Supervisor can edit a team member's information, unlock their team member's account, and change a team member's password.

Navigation

Navigate to the **Home** Space and select the **My ClientTrack** Menu Group, followed by the **My User Configuration** Menu Group, then **My Team**.



> Please Note: If a User is not assigned to be the Supervisor to another User, the **My Team** Menu Option will be grayed out and cannot be selected.

Changing Password of Supervised Users

1. After navigating to the My Team Menu Option, select the **Action** button next to the desired User's name.
2. Select **Change Password**.
3. Enter a new password in both fields, ensuring both passwords match.
4. Select **Change Password**. The supervised User's password is now updated.

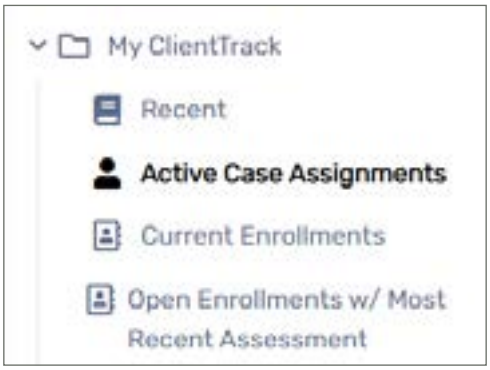
> Please Note: When changing passwords for a User in any environment that contains client data, a Supervisor should choose an easily remembered temporary password and select the **Require Password Change at Next Login** checkbox.

My Case Assignments

This screen will display a list of the current Clients that are part of the User's **Active Case Assignments**.

Navigation

Navigate to the **Home** Space and select the **My ClientTrack** Menu Group, followed by the **Active Case Assignments** Menu Option.



Selecting a Client from the Active Case Assignments

1. After selecting the **Active Case Assignments** Menu Option, locate the desired Client by scrolling through the list or using the Search bar.

2. Select the icon to the left of the name of the desired Client.

3. You will now be in the Client Space and see the selected Client's **Dashboard**.

There is also a button in the top right of the page that allows the User to see a similar screen with Client with Inactive Case Assignments.

User Tasks

Tasks are items that need to be completed. Tasks can be assigned to both Users and Clients in the ClientTrack platform. Tasks can be created with specific due dates and assigned parties to monitor progress. They can also be linked to the calendar feature.

To assign a Task to a specific User

1. Navigate to the **Home** Workspace and select **User Tasks** from the My ClientTrack menu grouping.

2. The User Tasks form will display all current, non-completed tasks. To add a new task, select **Add New Task** in the right-hand corner.

3. The Add New User Task form window will appear where you will enter a **Title** for your task and any **Notes** in the open text field.

4. Next, assign a **Begin Date** and **Due Date**.

5. Select the **Task Status** from the dropdown menu.

6. The **Task to be Completed For** will automatically default to the current User. If this needs to be changed, use the **Find** icon to do so.

7. Lastly, select the **Participants** that will be associated with this task, and their **Role**.

8. Once the task has been created, it will display on the User Tasks form and can be **Edited**, **Deleted**, or marked **Complete** using the appropriate icons.

Working With Clients

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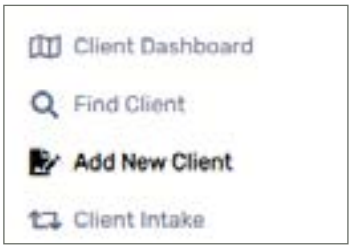
Working With Clients

This section describes the main tasks that ClientTrack Users perform that involve collecting data and working directly with Clients through multiple forms and workflows in their solution.

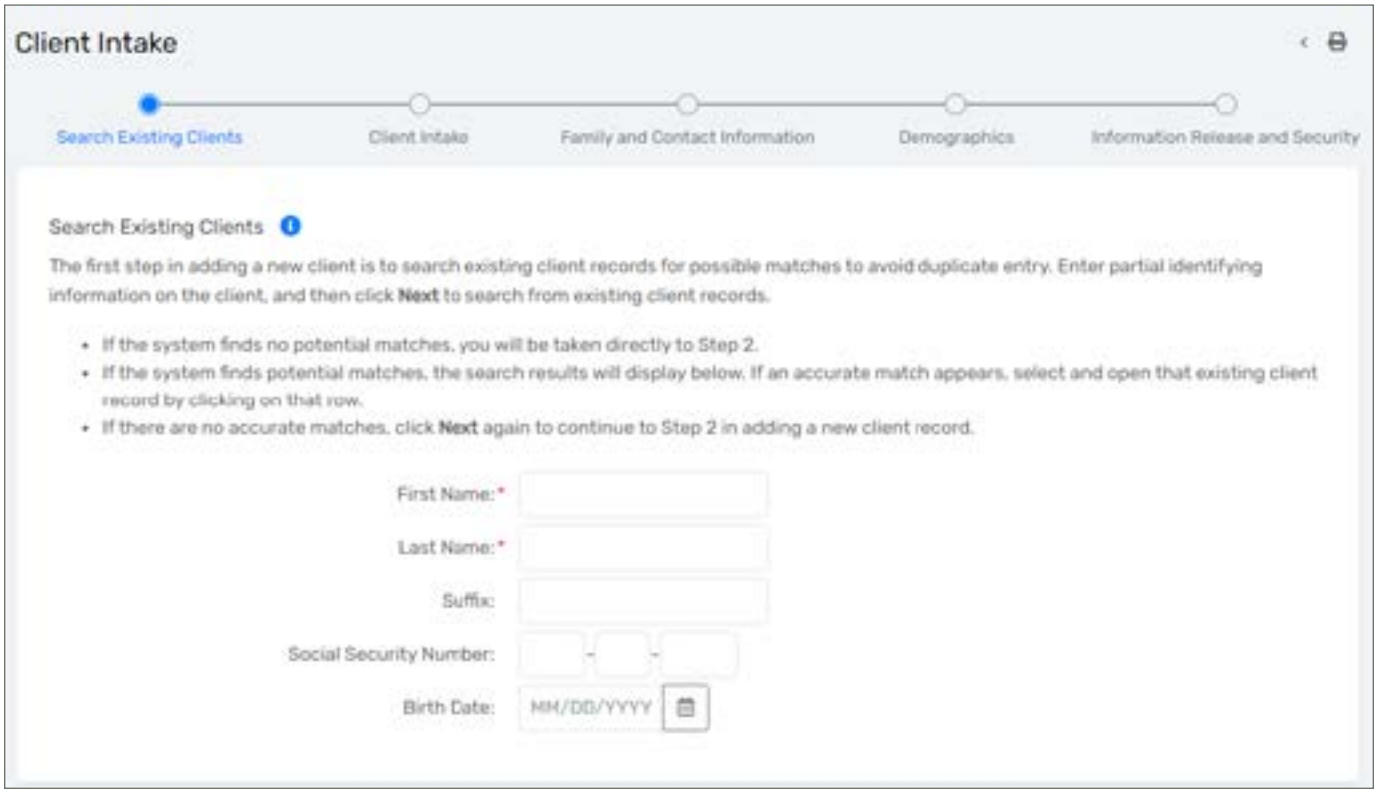
Adding a New Client

To begin the Client Intake process:

1. Navigate to the **Client** Workspace and select **Add New Client** from your menu. The name of this Menu Option may vary based on your organization's unique configuration.



2. ClientTrack will take you through the **Client Intake** Workflow step by step. The first step, to ensure data accuracy and prevent redundancy, is to search the database to see if the Client is already in the system. Enter the **Name**, **SSN**, and **Birth date** of your Client. ClientTrack automatically checks for duplicate clients when you click Next.



3. Once confirmed that this is, in fact, a new Client, you can complete the additional steps in the Intake Workflow process.

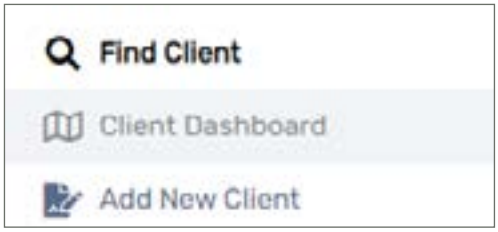
4. Select **Finish** once all necessary information has been entered. You will then be taken to your new Client's dashboard.

Finding an Existing Client

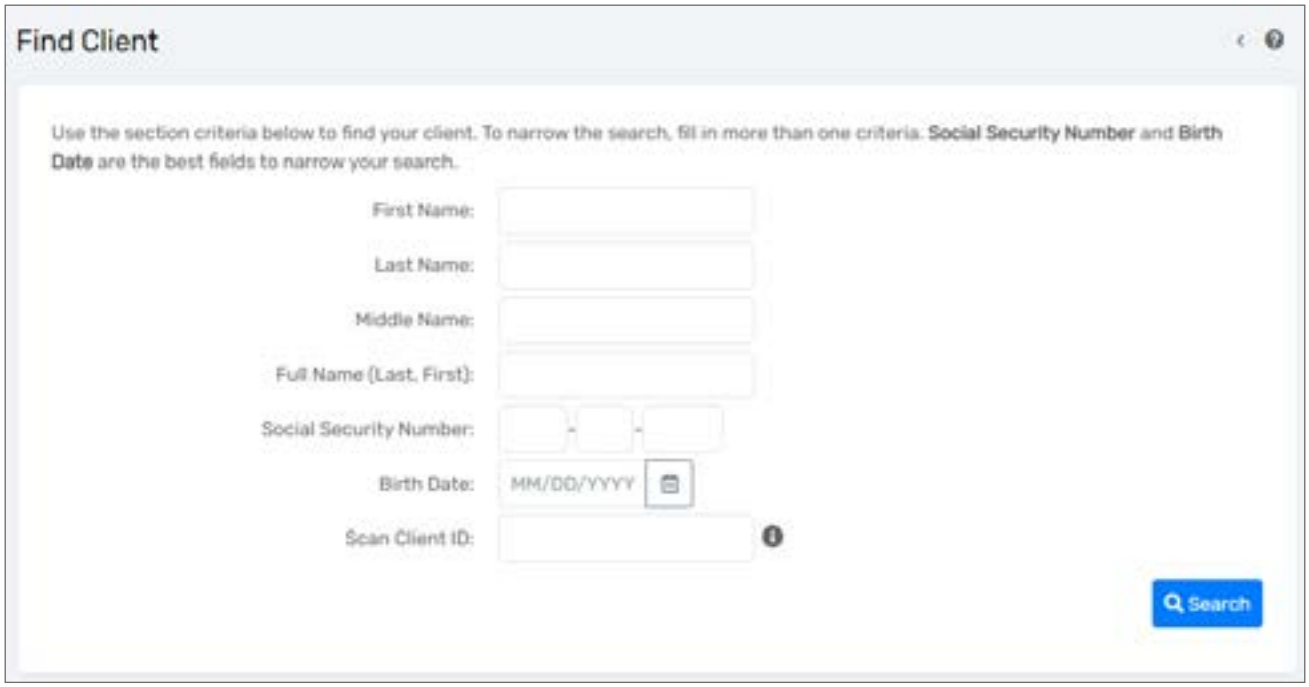
Once you have entered a Client into ClientTrack, you can find them again at any time by using the Find Client feature.

To find an existing Client:

1. Navigate to the Client workspace and select **Find Client** from your menu.



2. Enter the identifying information as outlined in the Find Client form and select **Search**.



> Please Note: If you leave the search fields blank on this form and select **Search**, a list of all Clients will be displayed.

3. Once you've found the client you were searching for, select their **Name**, and you will be taken to their dashboard.

4. For a quicker search option, you can utilize the **Global Search Bar**. Type the Client's last name into the search bar and ClientTrack will display the Find Client page.

Editing a Client

If the need arises to enter new or updated information about a specific Client, you can do so using the **Edit Client** feature.

Navigation

Navigate to the **Home** Workspace and find the **Client** whose information you need to edit.

Editing Client Information

1. Once you have selected the **Client**, select the **Edit** icon to the right of the Client's name.

2. The Client Intake form will allow you to update any necessary information.

3. Select **Finish** to save the newly edited Client record.

Enrollments

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Enrollments

The basic components of **Enrollment** include **Program Name**, **Begin Date**, and **End Date**. An Enrollment can be associated with Assessments for reporting purposes.

The function performed by an Enrollment may come under a number of different names, so it is important to think in terms of function. Many items, such as Assessments, need to be associated with an Enrollment in order for reporting to work properly.

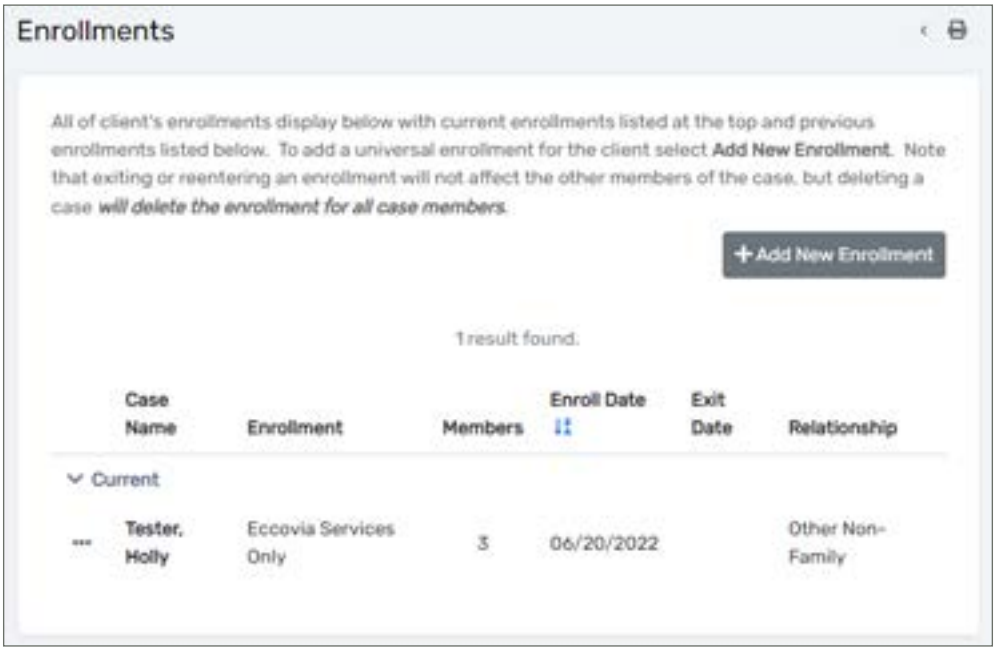
An Enrollment is often used to mark a range of time for measuring outcomes.

Navigation

Navigate to the Client Workspace and select **Enrollments** from the menu.

Adding a New Enrollment

1. From th Enrollments page, select **Add New**.

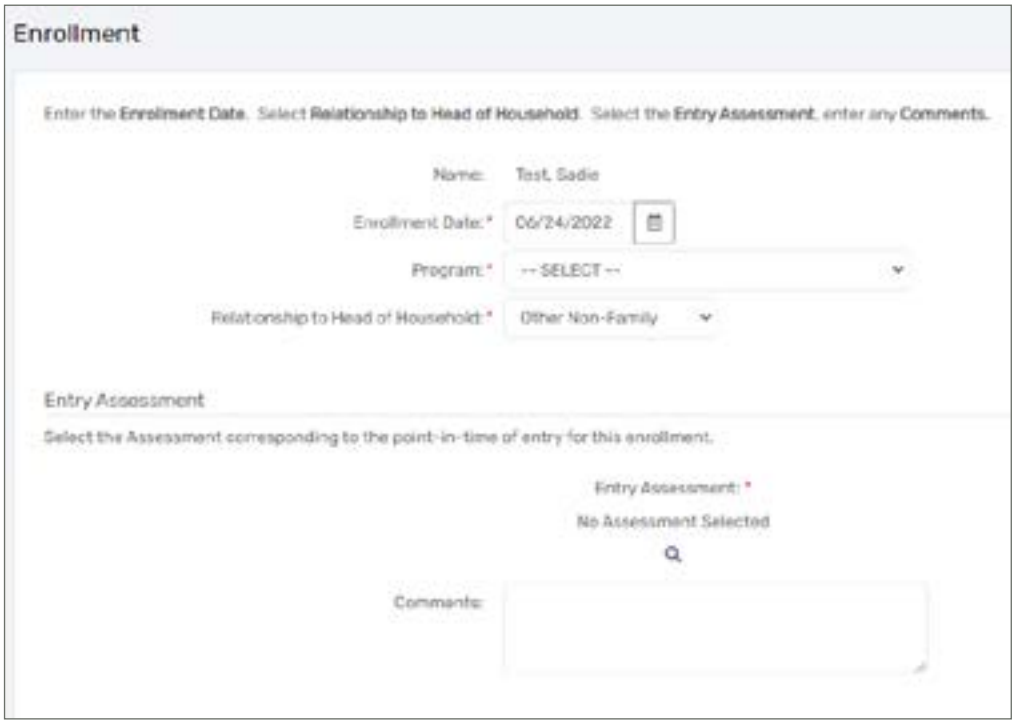


2. Enter the **Enrollment Date**.

3. Select the **Program** to enroll the Client in.

4. If you wish to associate the Enrollment with a Grant, select the correct **Grant**. This is often used for Reporting purposes.

5. Change the **Relationship to Head of Household** and **Case Manager**, if necessary.

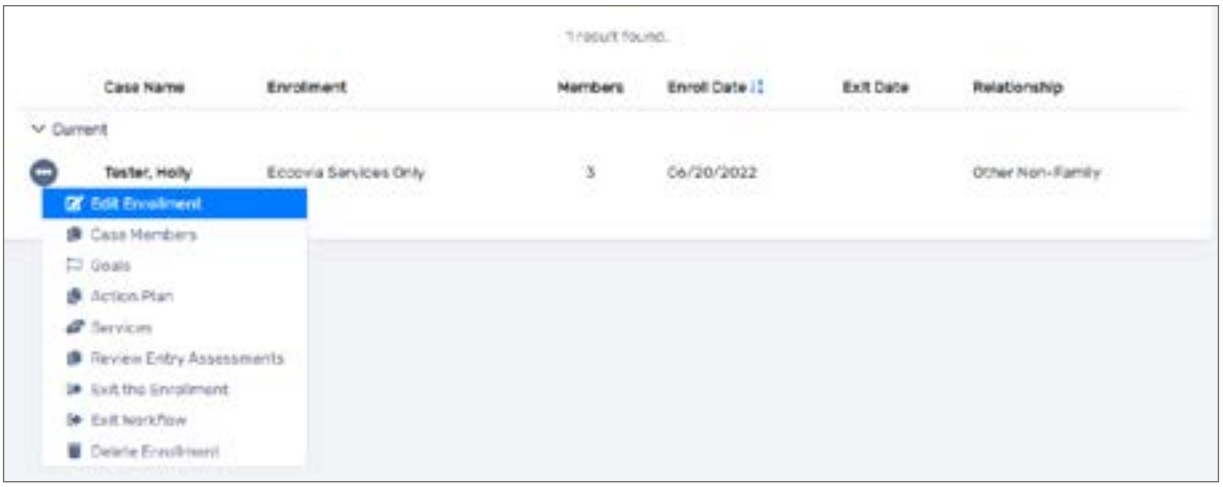


6. The next section allows you to associate the Enrollment with an **Assessment**. This section uses the Assessment plugin which you will see on many forms that use Assessments. Select the **magnifying glass** icon to search for existing Assessments or create a new Assessment.

7. Use the checkboxes to initiate a follow-up, if necessary.

Once an Enrollment is created, it will appear on the Enrollments page. Selecting the **Action** button will allow you to:

- Edit the Enrollment information entered when the Enrollment was created.
- Case Members, Goals, Action Plan, and Services are all used to collect their respective data points with a reference to the Enrollment.
- When the Enrollment period has ended, select Exit the Enrollment or Exit Workflow. This will prompt for some data related to exiting the Enrollment.
- To delete the Enrollment entirely, select Delete Enrollment.



Assessments

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Assessments

Assessments are snapshots of a Client's situation, including education, financial, health, and employment issues as well as barriers to Client success. Unlike basic Client information, such as name, address, and family information, Assessments track Client data that generally varies over time. After adding a new Client and entering basic Client information, the next step is capturing Client Assessment information, which is then used to create Goals and Action plans.

Client Assessments can be accomplished through Workflows, which are discussed later in this document. This section explains some of the different types of Assessments.

ClientTrack offers many different Sub-Menus in the Assessments section to evaluate Client issues. To better explain the Assessment process in ClientTrack, this section will discuss Master Assessments and Informational Assessments. The process to enter information and record Client Assessments is essentially the same for all categories.

Master Assessments

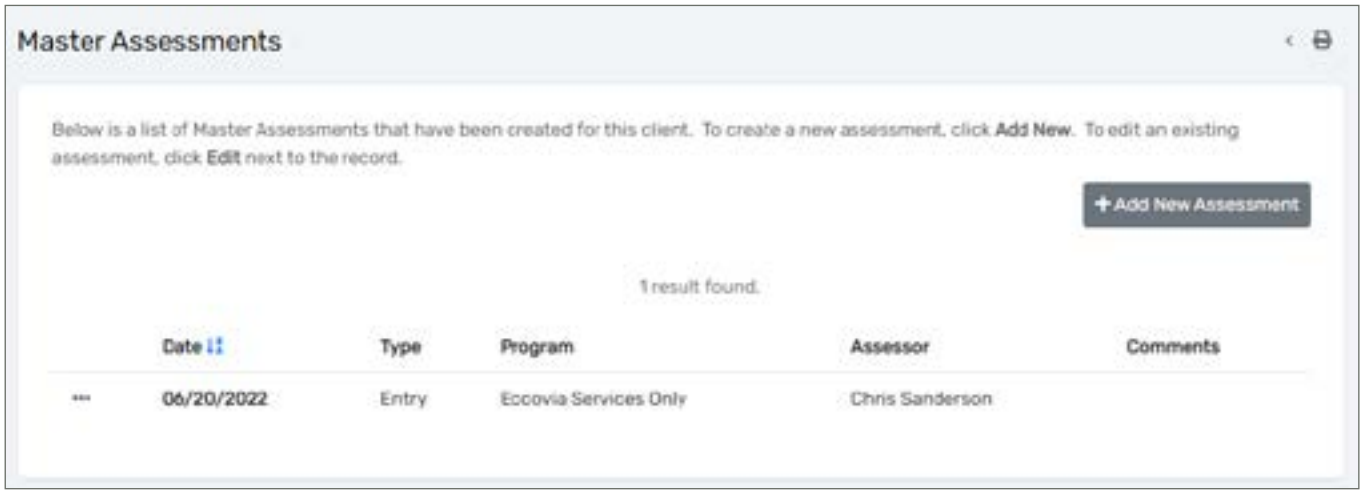
A Master Assessment ties a number of separate, detailed Assessments/data elements to a single process at a particular point in time. Data presented in the Master Assessment is controlled by the system administrator and is based on the requirements of the Annual Progress Report (APR), if applicable. Master Assessments are normally created during Workflows, which will be explained later. The Master Assessment form creates an Assessment ID, which is used to tie all Program-specific Assessments together.

To Access Master Assessments

1. From the Client Workspace, find the relevant Client. This will navigate to their dashboard.

2. From the Client's dashboard, select the **Assessments** Menu Group.

3. You will see a list of the selected Client's Master Assessments.



Viewing Assessments Associated with a Master Assessment

1. Locate the desired Master Assessment and select the **Action** button to the left of the Assessment's Date.

    a. Selecting **View Related Assessments** will redirect the User to another form that displays the Details, Progress, and Status of each possible Assessment in the Workflow.

    b. Selecting **View Related Enrollment or Applications** will redirect the User to another form that displays the Assessment Type, Record Type, and Link Description for any related enrollment or applications.

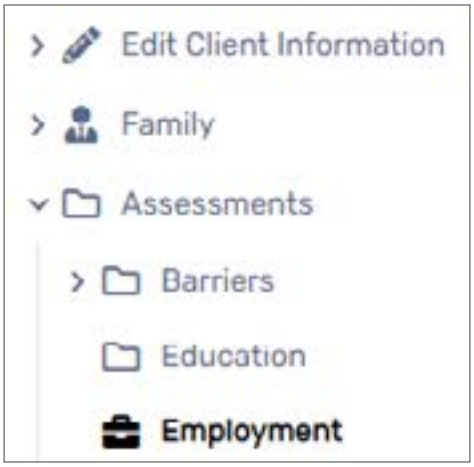
Informational Assessments

Informational Assessments are used to collect a broad range of Client data including health issues, veteran status, education, work history, and financial information. This type of information helps the case manager determine the best way to assist Clients.

To Access Informational Assessments

1. Navigate to the Client Workspace, and find the Client whose Assessments you wish to view. Once their dashboard appears, you can open the **Common Assessments** Menu Group or the **Other Assessments** Menu Group.

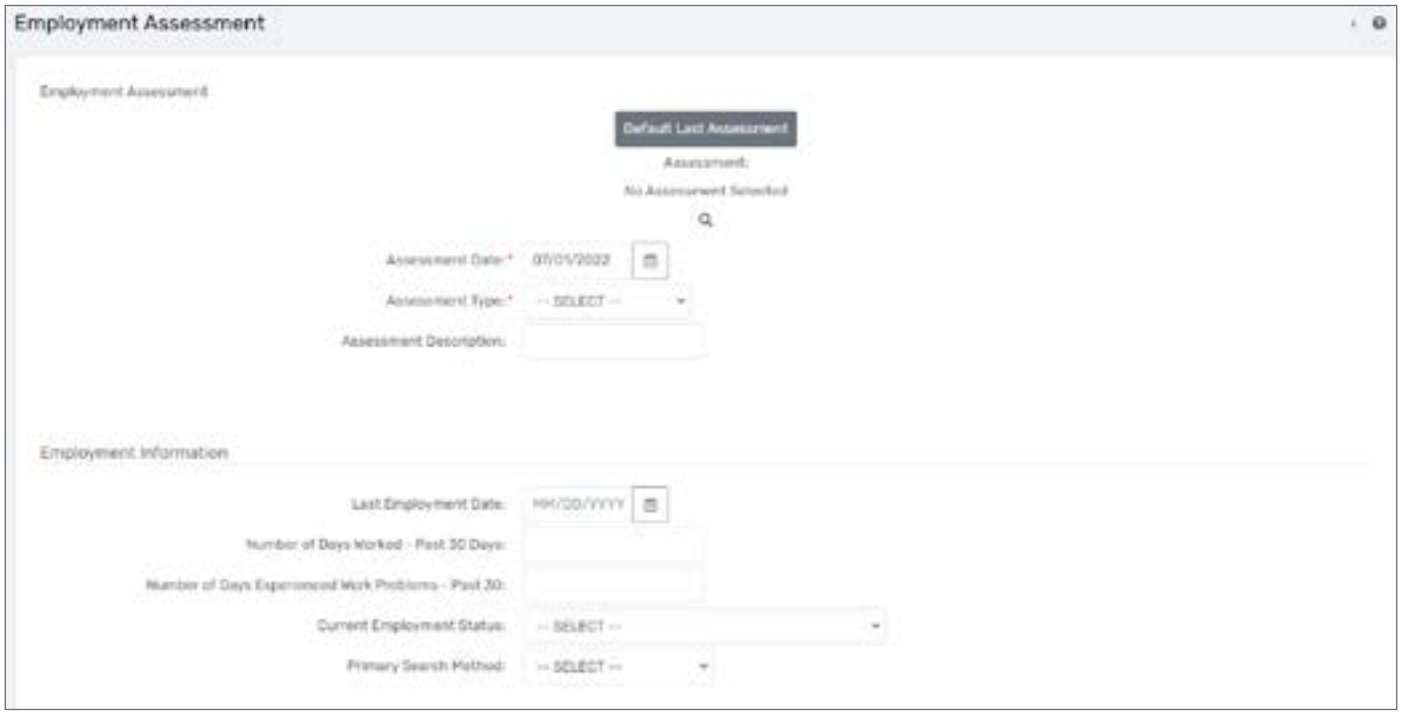
2. To enter an Informational Assessment, select the Menu Option of interest. For example, you can create an Employment Assessment by selecting **Employment**.



3. You can now view the Employment Assessments form, which will list all previous Assessments completed by this Client. To create a new Assessment, select **Add New**.

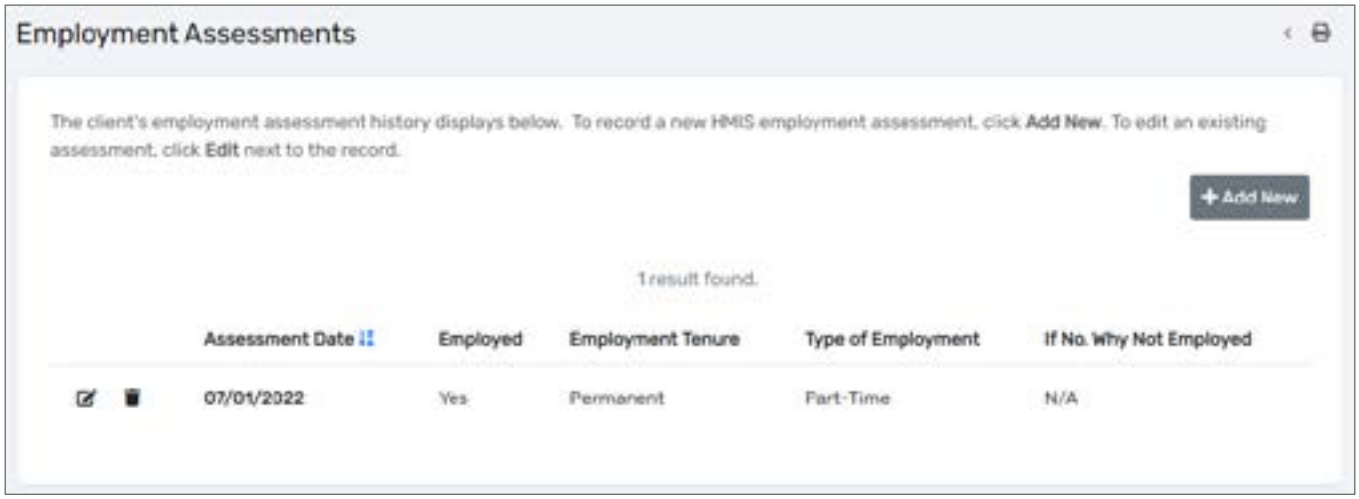
Please Note: If the Client does have a previous Assessment listed, you can select **Default Client's Last Assessment** to default the fields to what was recorded during that previous Assessment. This is useful if there have been no changes to a Client's Status.

4. If you are not defaulting the Client's last Assessment, fill in the data fields and select **Save**.



5. The new Assessment will now appear in the list on the Employment Assessments form.

6. Existing Assessments can be **Edited** or **Deleted** by using the icons to the left of each Assessment.



Barriers

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Barriers

Barriers represent issues that may affect a Client's ability to achieve specific goals or outcomes dictated at organizational or state levels.

Navigation

Navigate to the **Client** Workspace and select the **Assessments** Menu Group, followed by the **Barriers** Menu Option.

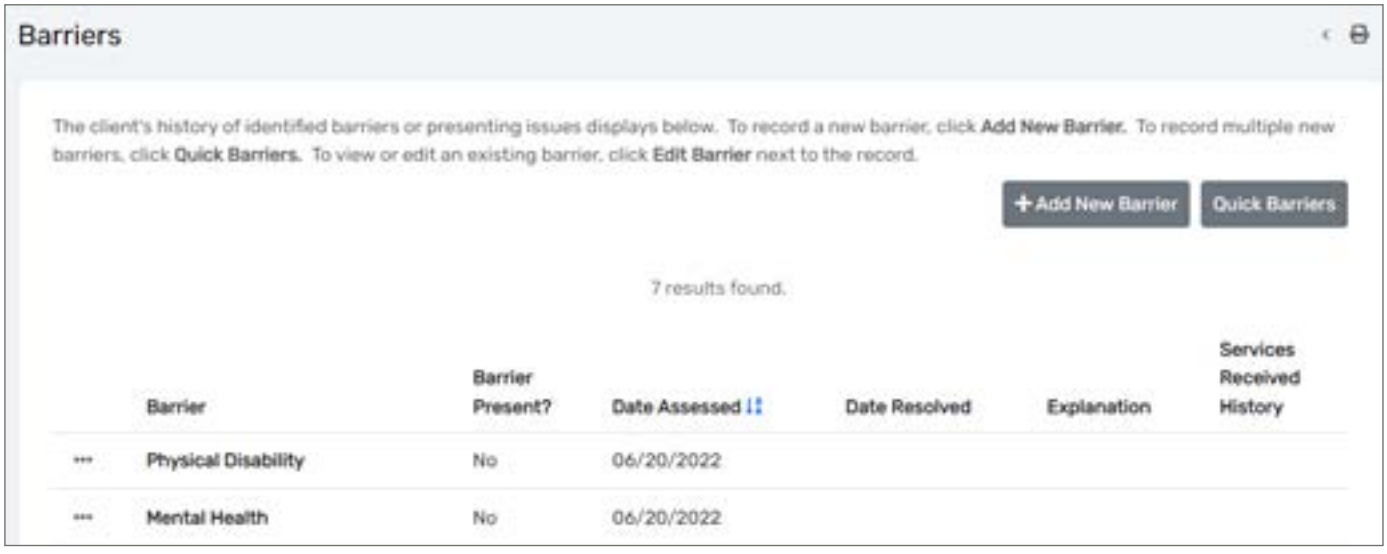
Viewing a Client's Barriers

Users should only use the Barriers Menu Option to view previously entered Barriers. To add or edit a previous Barrier, the User should use the proper Workflow.

1. After locating the desired Client, navigate to the **Barriers** Menu Option. You will see a list of the selected Client's Barriers for each Assessment completed.

2. View all the selected Client's Barriers.

3. After you have viewed the necessary information, select **Cancel** at the bottom-right of the screen to return to the Client dashboard.

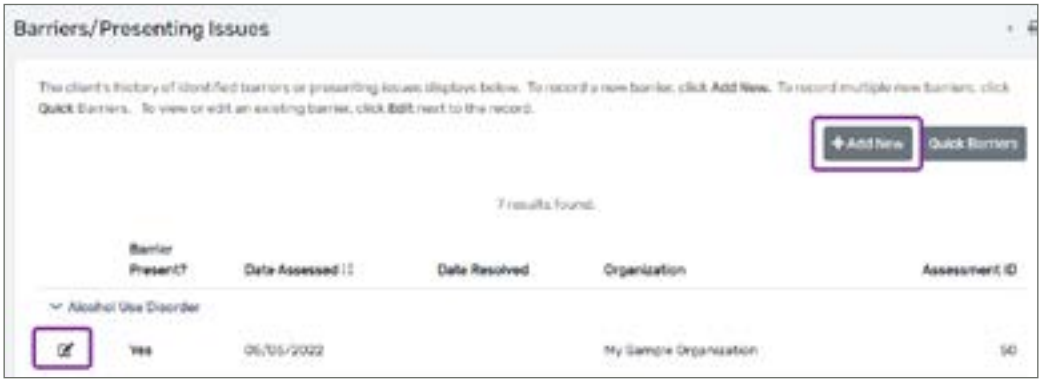


Adding or Editing a Barrier

1. After locating the desired Client, navigate to the Barriers Menu Option. You will see a list of the selected Client's Barriers for each Assessment completed.

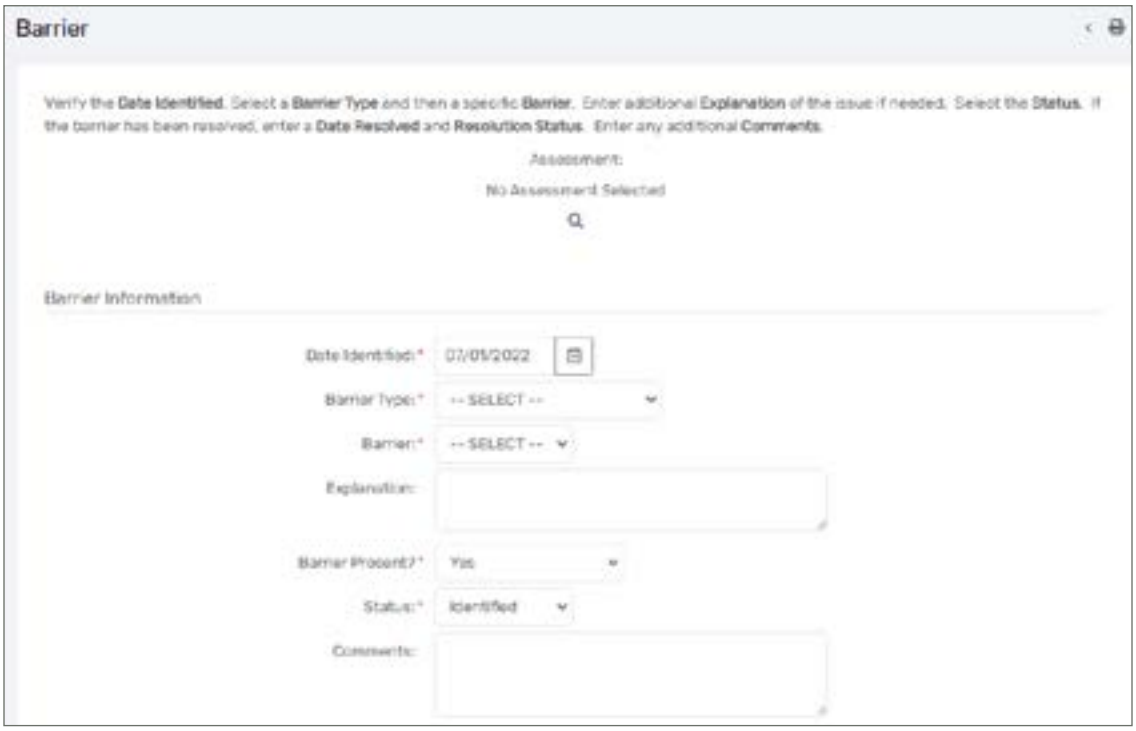
   a. If editing an existing Barrier, find the desired Barrier from the list and select the **Edit** icon below the Barrier name.

   b. If adding a new Barrier, click **Add New** in the top-right of the form.



2. Select/Change the **Barrier Type**, **Barrier**, and **Status** as appropriate.

3. If necessary, add an **Explanation** and/or **Comment**.



4. Select **Save** to save the changes and be directed to the Barriers Menu Option. Any newly added Barriers will now be visible on the list.

Using Quick Barriers to Add Multiple Barriers

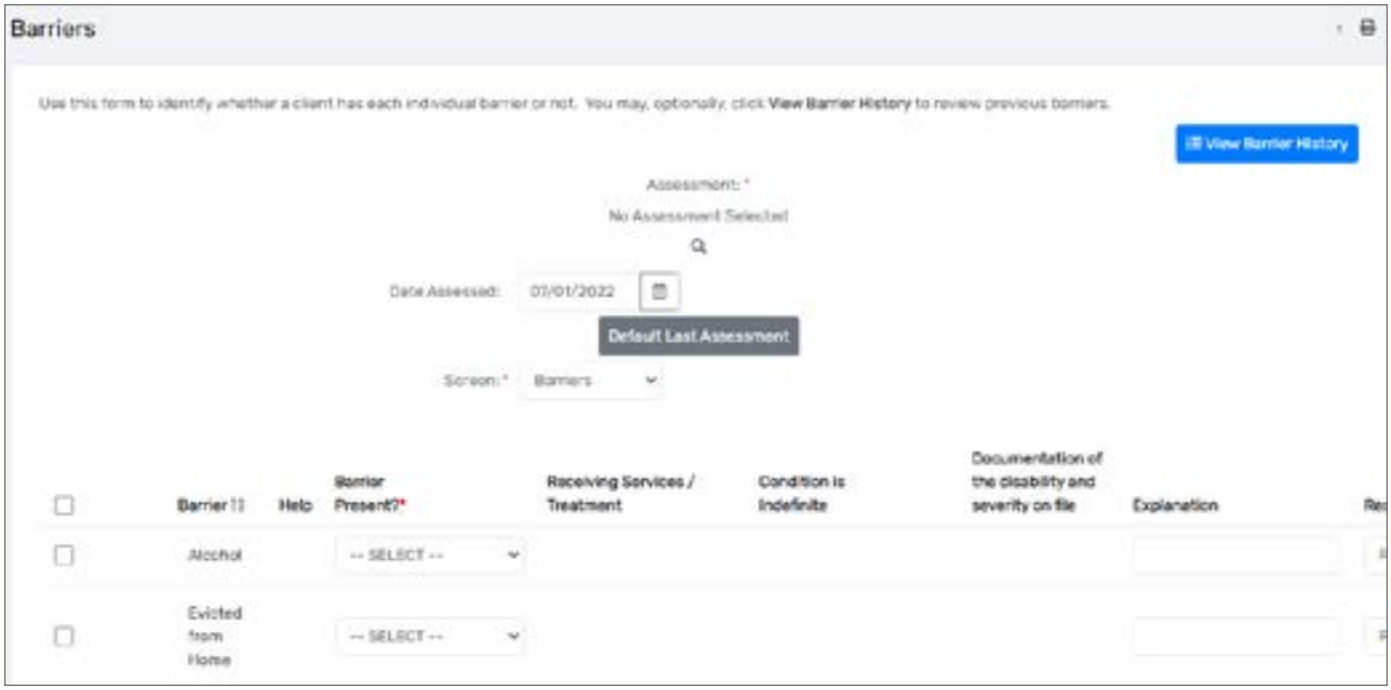
The Barriers Menu Option also gives Users access to the **Quick Barriers** functionality. This functionality allows for Screens to be setup with specific Barriers that allows for part or all of the Barriers in a Screen to be added or edited at once.

1. After locating the desired Client, navigate to the **Barriers** Menu Option. You will see a list of the selected Client's Barriers for each Assessment completed.

2. Select **Quick Barriers** in the top-right of the form. You will see a multi-select form with a list of Barriers.

3. Identify your Client's Barriers by selecting the checkbox next to any applicable Barriers. Selecting the checkkbox on the header row will select all Barriers listed on the page.

4. Select and **add/edit** any Barriers on the selected Screen.



5. Select **Save & Close** to be returned to the Barriers Menu Option. Any newly added Barriers will now be visible to the User on the list.

Goals

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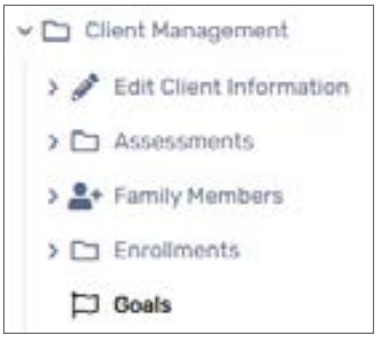
Goals

Once you have entered a Client and conducted any necessary Assessments, you can then assign Goals to that Client and establish progress plans to achieve those Goals. In addition, you can link specific services to those goals and action plans.

Navigation

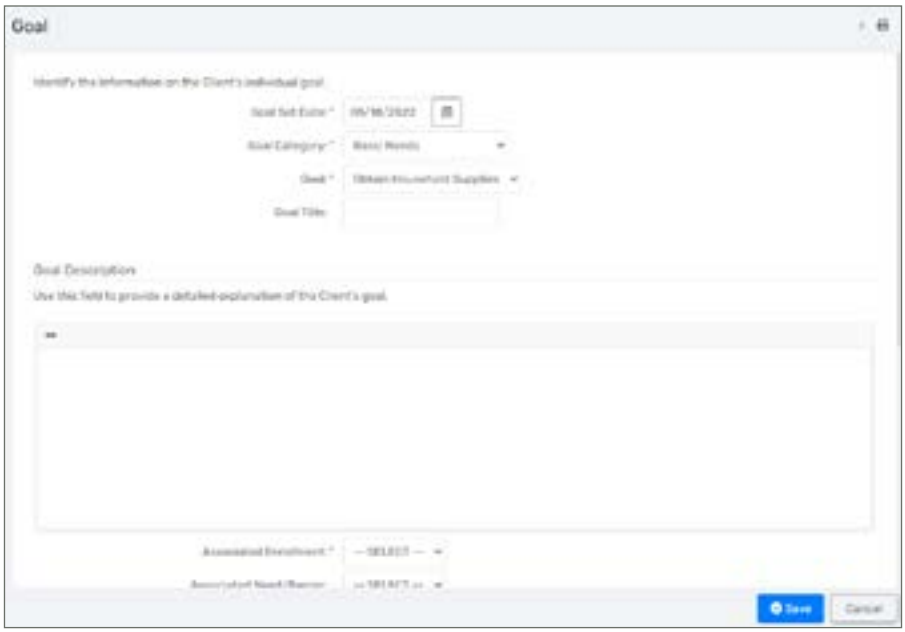
Navigate to the **Client** Workspace and search the desired Client. From the Client's dashboard, select Goals from the Client Management Menu.



Assigning a Goal to a Client

1. After selecting Goals from the Client Management Menu Group, you will be brought to the Goals form. This will list all Goals associated with this Client, along with their dates and outcomes. Select **Add New** in the right-hand corner to proced.

2. Complete the data fields on this form, which will determine what populates the Goal dropdown menu.



3. Enter an explanation in the open text box, if needed, and select **Save** to finish.

4. Once a goal has been entered, it will display on the Goals form, where it can be Edited or Deleted. You can also view any associated progress, Case Notes, or Services for this particular Goal.

Quick Goals

Another method for adding Goals, ideal for assigning multiple Goals to a Client quickly, is the Quick Goals functionality.

1. Navigate to the Client Workspace and find the Client in question. From the Client's dashboard, select **Goals** from the Client Management Menu.

2. This will show the Goals form, which lists all Goals associated with this Client, along with their dates and outcomes. Select **Quick Goals** in the right-hand corner to proceed.

3. On the Quick Goals form, select the appropriate **Screen** and **Goal Group** from the dropdown menus. These will filter the goals that appear for selection on the bottom portion of the form.

4. Check the box next to each **Goal** you would like to assign to this Client.

5. Enter the appropriate **Date** and **Status**, as well as any comments for each Goal.

6. Select **Save & Close** to finish.

7. Once the Quick Goals have been entered, they will display on the Goals form, where they can be individually Edited or Deleted. you can also view any associated progress, Case Notes, or Services for this particular Goal.

Services

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Services

A **Service** is a task performed for or on behalf of a Client, or a tangible item provided to a Client. Each Service has a Name, a Unit of Measure (dollars, hours or minutes, count), a Value, and an Associated Date. Services can be grouped together in a Service Group. Services and Service Groups are not required for a ClientTrack implementation but are generally recommended. Services are often associated with Grants or Programs.

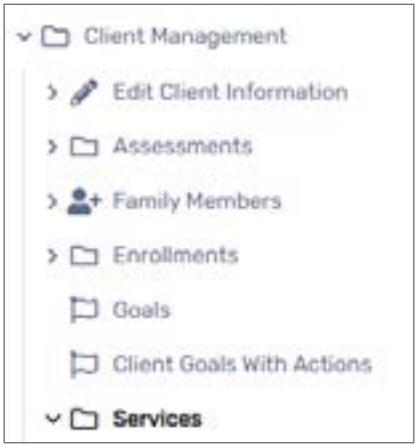
Services can be restricted to one or more security organization. For example, a Financial Services Service Group may contain Services such as Financial Assistance, which is measured in dollars, Financial Counseling, which is measured in hours or minutes, or Financial Workshop participation, which is measured in a count of attendance.

Services are delivered Directly or Indirectly. A Direct Service is a Service provided to an identifiable Client, usually enrolled in a Program. An Indirect Service is provided to a non-identifiable potential client, such as individuals participating in a public seminar or outreach activity.

Services can be recorded individually or in multiples, depending on the need.

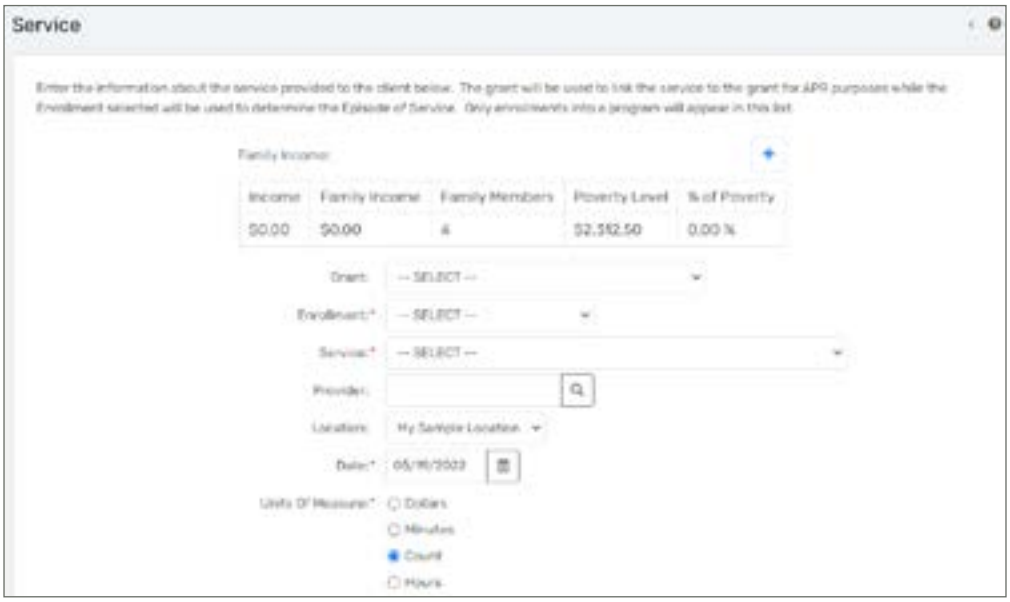
Recording an Individual Service for a Client

1. Navigate to the Client Workspace and find the Client in question. From the Client's dashboard, select **Services** from the Client Management Menu Group.



2. This will show you the Client Services form, which displays a history of all Services recorded in the system for this Client. Select **Add New Service** in the right-hand corner to proceed.

3. The Client Services form will prompt you to enter information about the Service being provided to this Client. The Grant field is used to link the Service to the Grant for reporting purposes, while the Enrollment field selection will be used to determine the episode of Service.



4. Enter the **Units of Measure** and **Value** for the Service you've selected from the dropdown list, along with any applicable **Reason**, **Goal**, **Referral/Action Plan**, **Associated Need/Barrier**, and any **Comments**.

5. There is also a section for **Turnaway Reason** if this individual is denied the Service being entered.

6. Once all information for this Service has been entered, select **Save** to finish.

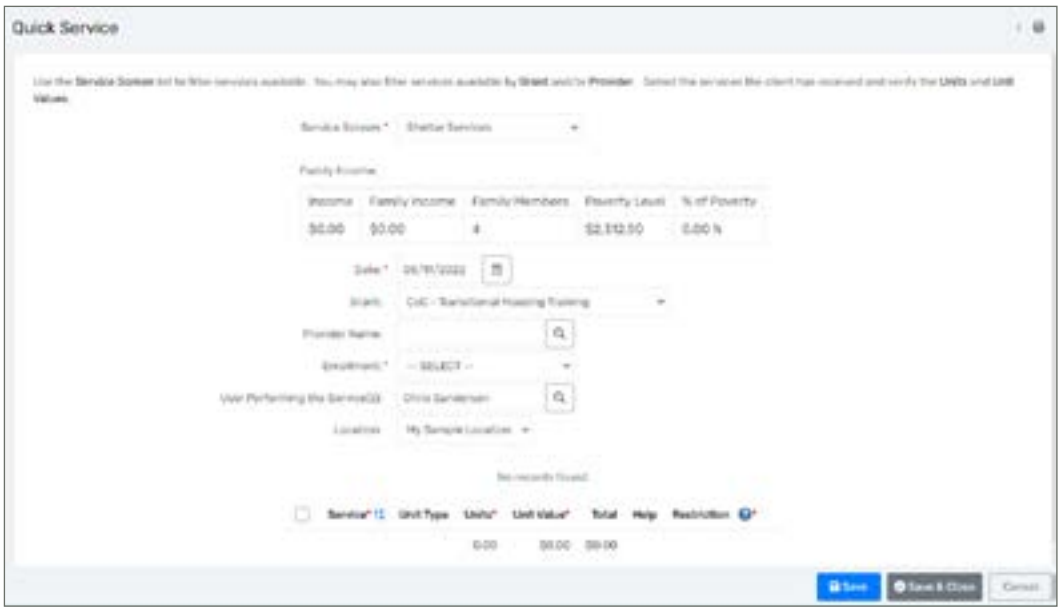
7. Now that the Service has been entered, it will display on the Client Services form, where it can be Edited or Deleted, if necessary.

Quick Services

The **Quick Services** option allows you to record multiple Services for a Client simultaneously. This form can be accessed by under the Services Menu Group or on the Client Services form.

Creating Quick Services

1. On the Quick Services form, select the appropriate **Services Screen** filter and **Grant or Enrollment** from the dropdown menus.



2. Enter the **Provider Name** or search for the Provider using the Find icon.

3. Record each Service provided to the Client by checking the checkbox next to the appropriate Service.

4. Enter the number of **Service Units** provided, along with the **Unit Value**. Depending on your Organization's setup, the **Unit Cost** may auto-fill.

5. Once all Services and their Units have been recorded, select **Save**.

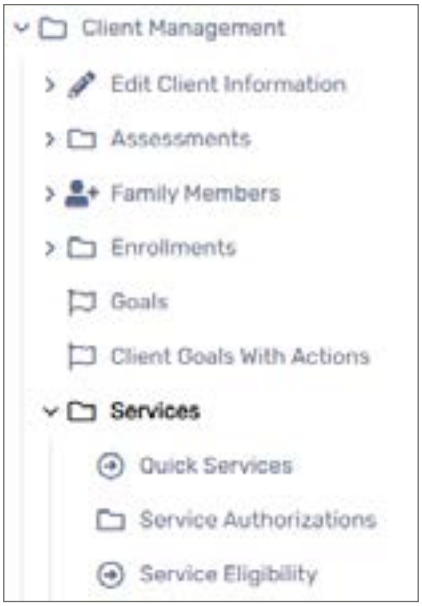
6. After you have entered all necessary Services, select **Save & Close**.

Service Authorizations

A **Service Authorization** is the identification of specific Services that are intended to be provided to a Client over a specified period of time and with a specified frequency. Each Service Authorization can have different statuses, including Pending, Approved, or Denied.

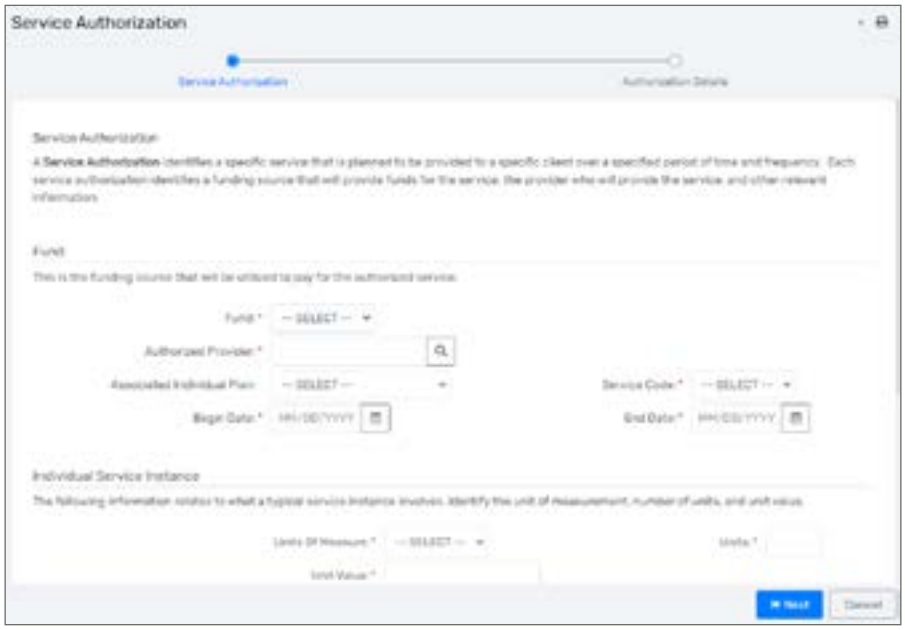
Creating a Service Authorization

1. Navigate to the Client Workspace and find the Client in question. From the Client's dashboard, select the **Client Management** Menu Group, followed by the **Services** Menu Group. Then select **Service Authorizations**.



2. The Service Authorizations form will display all current Service Authorizations for this Client. Select **Add New Service Authorization** to proceed.

3. On the form, identify the **Funding Source** via the Fund fields, as well as the **Service Code** and the **Begin** and **End Date**.



4. Enter the **Individual Service Instance** information, including **Units of Measure**, **Units**, and **Unit Value**.

5. Complete the **Recurrence** information and select **Next** to proceed.

6. The next page will ask for **Authorization Details** including **Reason** and **Goals**. Once these have been entered, as necessary, select **Finish**.

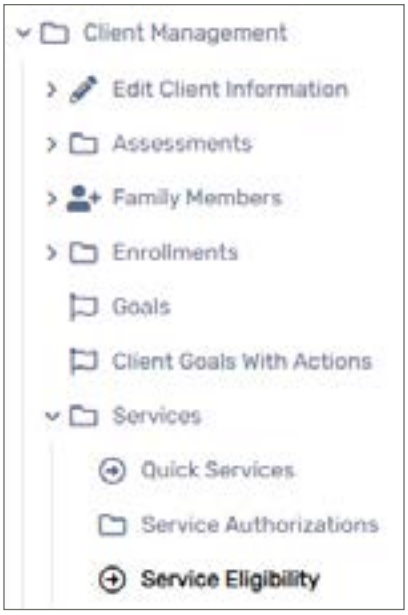
7. Once the Service Authorization is complete, it can be Edited or Deleted, if needed.

Service Eligibility

The **Service Eligibility** option on the Services Menu assists the case manager in determining Client eligibility for certain Services. The program uses inputs from the system administrator during setup to determine Client eligibility based on Client Assessments and Barriers.

To Access Service Eligibility

1. Navigate to the Client Workspace and find the Client in question. From the Client's dashboard, select the **Client Management** Menu Group, followed by the **Services** Menu Group. Then select **Service Eligibility**.



2. The Service Eligibility form displays Services and corresponding Client eligibility as determined by parameters created by the system administrator.

Referrals

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Referrals

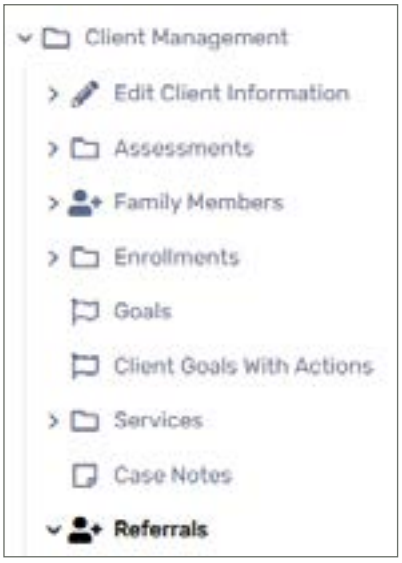
There are several methods of recording Referrals.

Referral Services

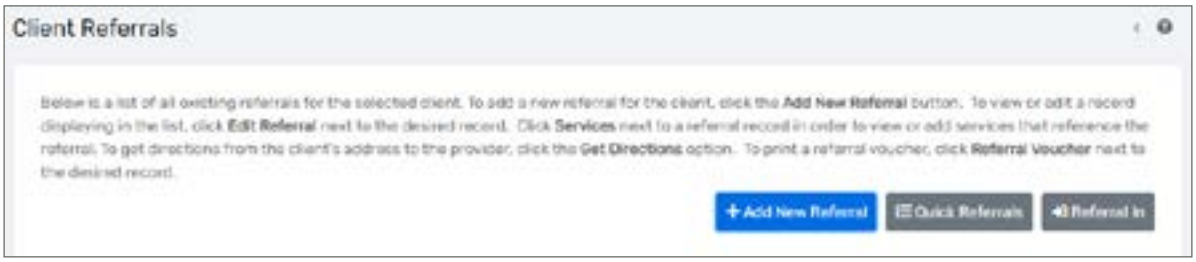
If you are referring a Client to another provider for Services, you can record the Referral as a Service.

Creating a Referral

1. Navigate to the Client Workspace and find the Client in question. From the Client's dashboard, select **Referrals** from the Client Management Menu Group.

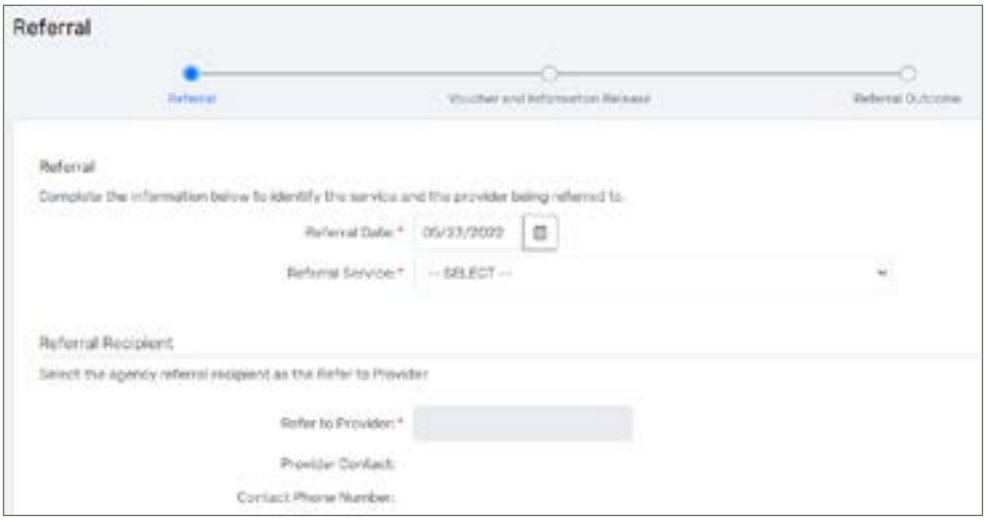


2. The Client Referrals form will display a list of all existing Referrals for this particular Client. Select **Add New Referral** to proceed.



3. On the Referral Form, enter the **Referral Date** and the **Referral Service** from the dropdown menu.

4. Use the **Find** icon to fill in the Refer to Provider field with the agency referral recipient.

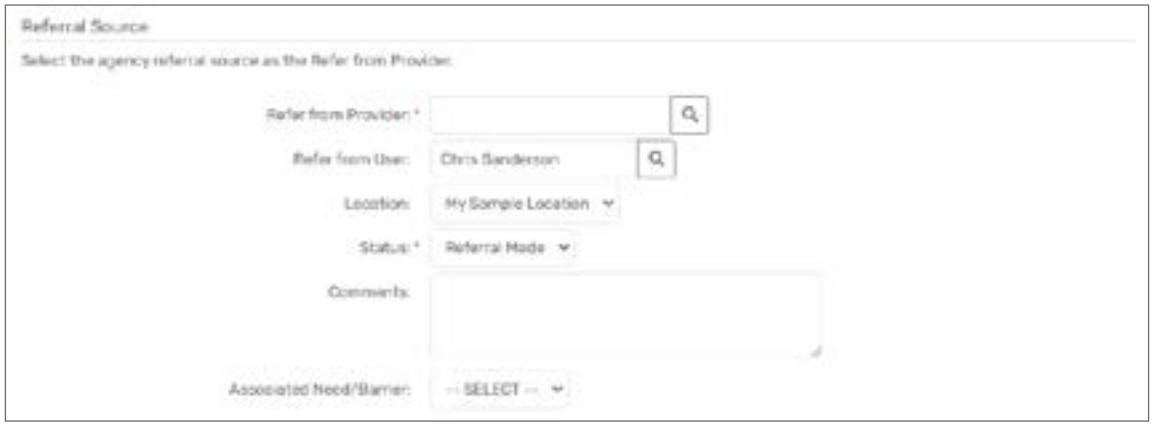


5. The **Refer From Provider** field defaults to your Organization. Use the Find icon to select a different provider if needed.

6. The **Refer From User** field also defaults to the current User, but can be changed using the Find icon.

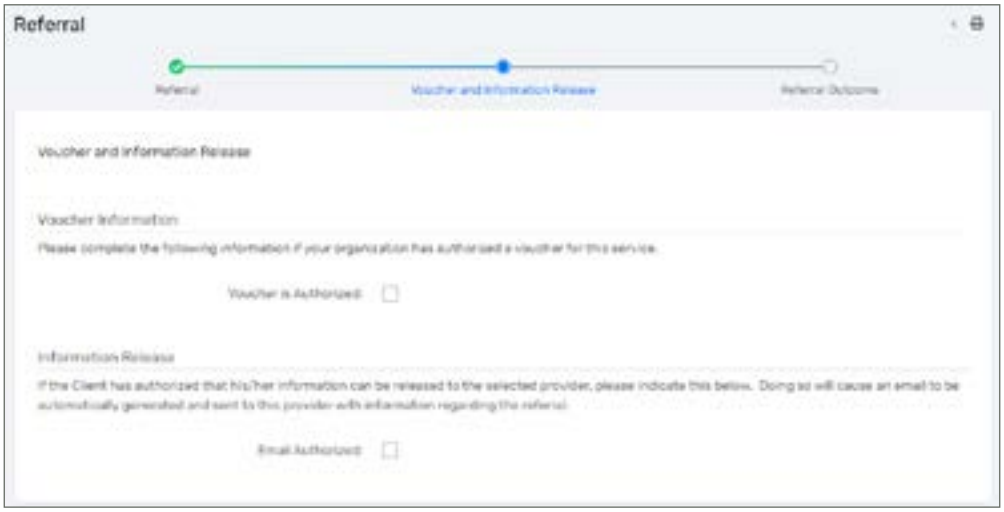
7. Select the **Status** of the Referral and add any **Comments**, if needed.

8. Select an **Associated Need/Barrier**, if applicable, and select **Next**.

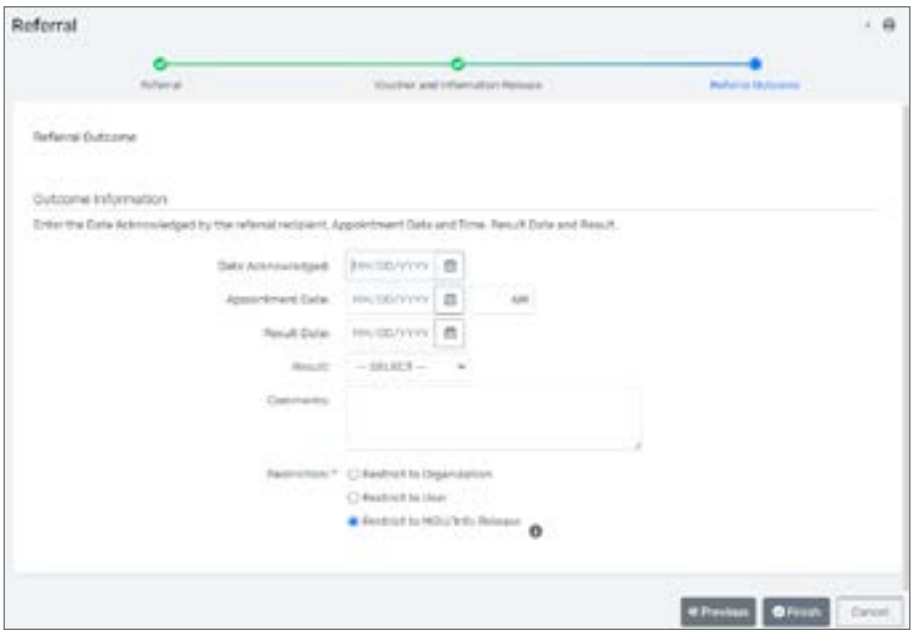


9. The next page is for Voucher and Information Release. If your Organization has authorized a voucher for this Service, select **Voucher is Authorized**.

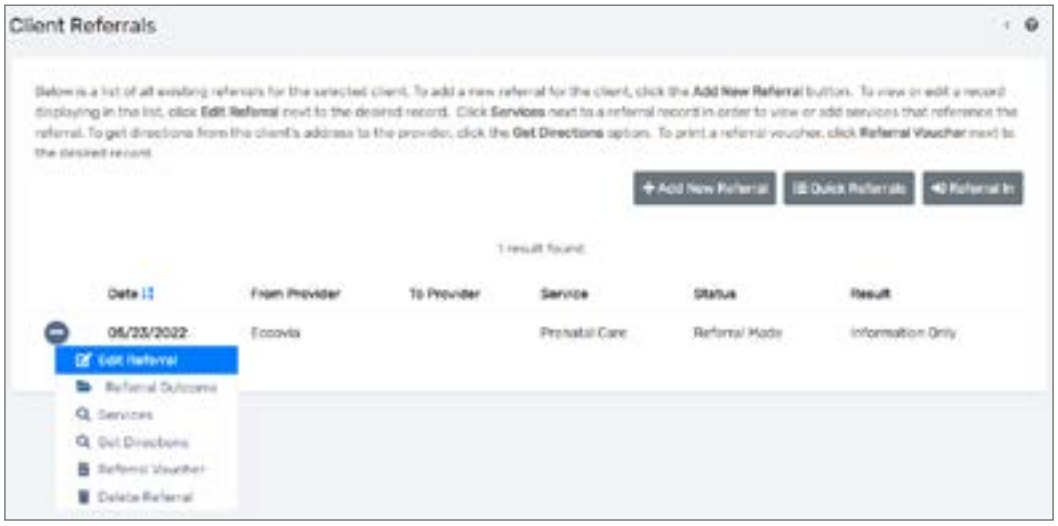
10. If the Client has authorized that their information can be released to the selected provider, check the **Email Authorized** checkbox. This will cause a window to open upon form completion of this form that allows you to write an email to this provider with information regarding the Referral. To proceed, select **Next**.



11. On the third and final form, enter the **Date Acknowledged** by the Referral recipient and any other desired information. Select **Finish** to close.



12. Once the Referral has been made, it will display on the Client Referrals form, where several actions can by taken using the Action button to the left of the Referral date. These actions include Edit Referral, View Referral Outcome, View Services that Reference the Referral, Get Directions to a Provider, Viewing or Printing a Referral Voucher, or Delete Referral.



Quick Referrals

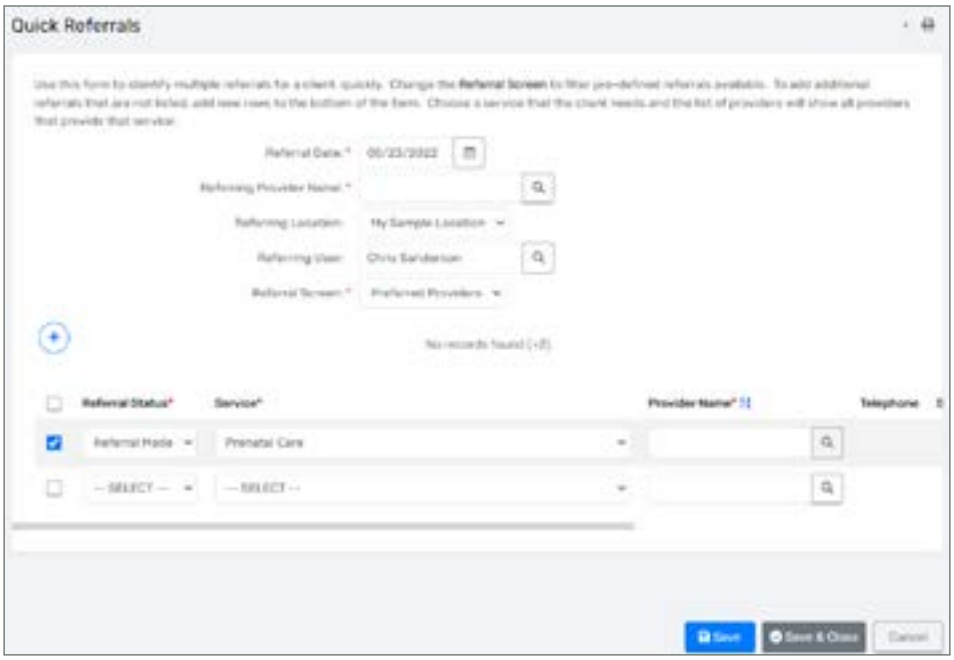
The Quick Referrals feature allows you to quickly make multiple Referrals for a Client.

Creating Multiple Referrals for One Client

1. Navigate to the Client Workspace and find the Client in question. From the Client's dashboard, select **Referrals** from the Client Management Menu Group.

2. On the Client Referrals page, select **Quick Referrals**.

3. One the Quick Referrals form, select a **Referral Screen** from the dropdown menu, which will display corresponding Referral Services.



4. Select the desired **Services** by checking the checkbox next to each Service applicable to your Client.

5. Once all information has been entered, select **Save & Close** to finish.

Referral In

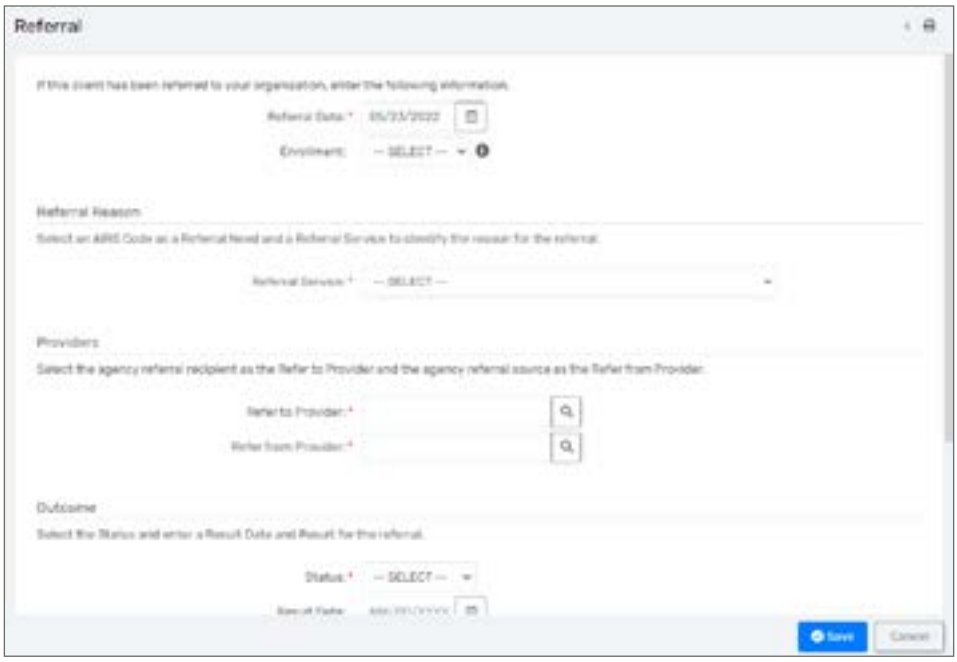
The need may arise for certain Users to record a Referral into their own Organization. To do so:

1. Navigate to the Client Workspace and find the Client in question. From the Client's dashboard, select **Referrals** from the Client Management Menu Group.

2. On the Client Referrals page, select **Referral In**.

3. Since the Client is being referred to your Organization from another provider, verify that your Organization's name is in the **Refer to Provider** field.

3. Since the Client is being referred to your Organization from another provider, verify that your Organization's name is in the **Refer to Provider** field.



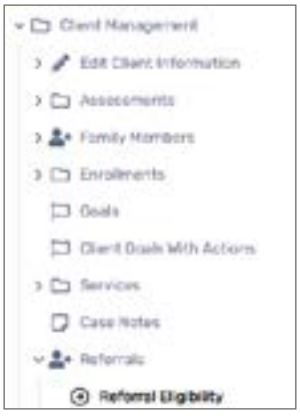
4. Complete the additional information for **Referral Reason**, **Providers**, and **Outcome**.

5. Select **Save** to finish.

Referral Eligibility

Referral Eligibility criteria is determined by your system administrator, though it is possible for Users to view Referral Eligibility for various Referral Services. To monitor Referral Eligibility for a particular Client:

1. Navigate to the Client Workspace and find the Client in question. From the Client's dashboard, expand **Referrals** from the Client Management Menu Group, then select **Referral Eligiblity**.



2. The Referral Eligibility form displays Referral Services that have Eligibility criteria. The selected Client is evaluated against Eligibility Criteria for each Referral Service, and a result for each is displayed in the columns.

Tasks

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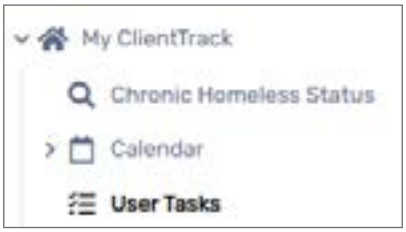
Tasks

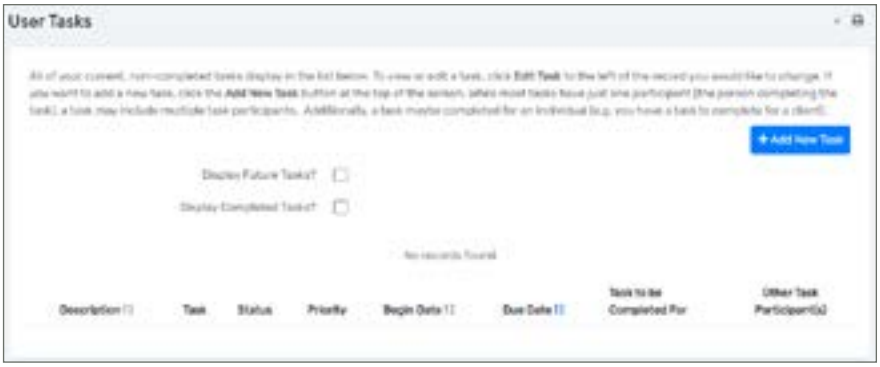
Tasks are items that need to be completed. Tasks can be assigned to both Users and Clients in the ClientTrack platform. Tasks can be created with specific due dates and assigned parties to monitor progress. They can also be linked to the Calendar feature.

Assigning a Task to a User

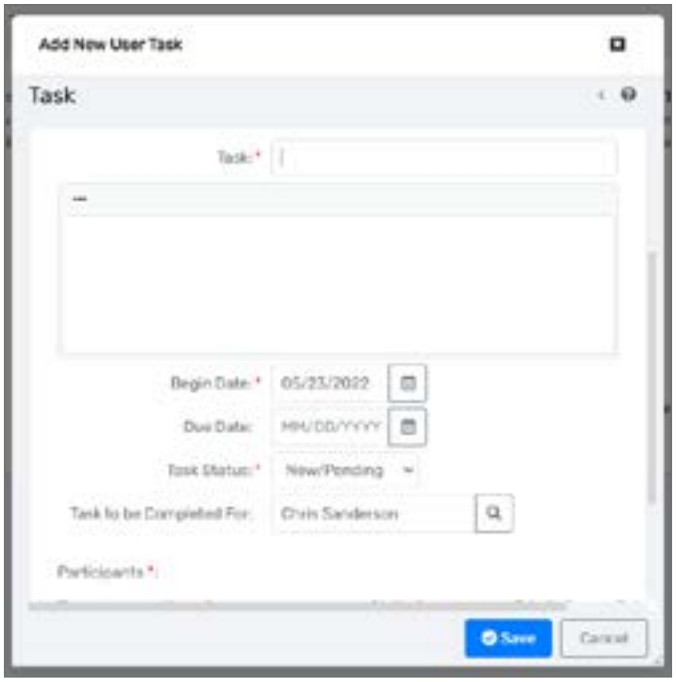
1. Navigate to the **Home** Workspace and select **User Tasks** from the **My ClientTrack** Menu Group.



2. The User Tasks form will display all current, non-completed Tasks. To add a new Task, select **Add New Task** in the right-hand corner.



3. The **Add New User Task** form window will appear, where you will enter a **Title** for your Task and any **Notes** in the open text field.



4. Next, assign a **Begin Date** and a **Due Date**.

5. Select the **Task Status** from the dropdown menu.

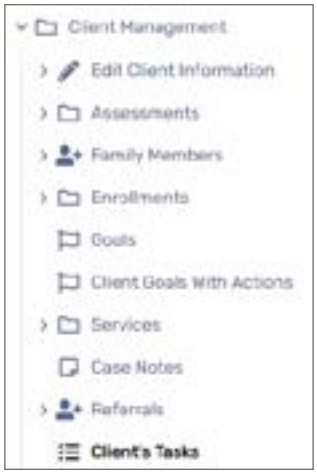
6. The **Task to be Completed For** will automatically default to the current User. If this needs to be changed, use the **Find** icon to do so.

7. Lastly, select the **Participants** that will be associated with this task, and their **Role**.

8. Once the Task has been created, it will display on the User Tasks form and can be **Edited**, **Deleted**, or **Marked Complete** using the appropriate icons.

Assigning a Task to a Client

1. Navigate to the **Client** Workspace and find the Client in Question. From the Client's Dashboard, select **Client Tasks** from the **Client Management** Menu Group.



2. The Client Tasks form will display all of this Client's Tasks. To add a new Task, select **Add New Task** in the right-hand corner.

3. The **Add New Client Task** form window will appear where you will enter a **Title** for your Task and any **Notes** in the open text field.

4. Next, assign a **Begin Date** and a **Due Date**.

5. Select the **Task Status** from the dropdown menu.

6. The **Task to be Completed For** will automatically default to the current Client. If this needs to be changed, use the **Find** icon to do so.

7. Lastly, select the **Participants** that will be associated with this Task, and their **Role**.

8. Once the Task has been created, it will display on the Client Tasks form and can be **Edited**, **Deleted**, or **Marked Complete** using the appropriate icons.

Case Notes

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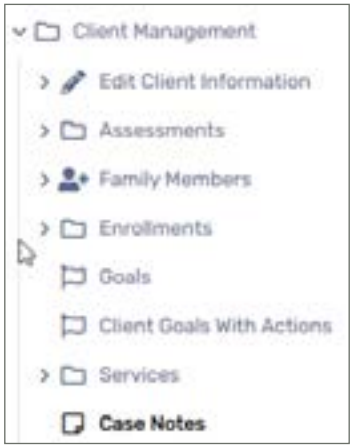
Case Notes

The **Case Notes** functionality in ClientTrack allows Users to enter unlimited notes and updates concerning Clients' goals, actions, and progress.

Recording a Case Note for a Client

1. Navigate to the **Client** Workspace and find the Client you'll be entering Case Notes for. Once their dashboard appears, select **Case Notes** under the **Client Management** Menu Group.



2. The Client Case Note form will display a history of Case Notes. To create a new Case Note, select **Add New Case Note** in the right-hand corner.

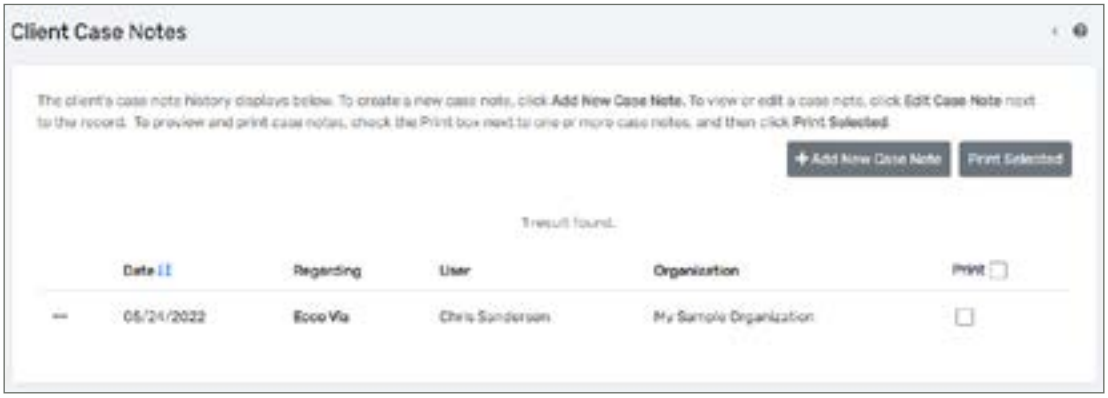
3. Complete the Case Note **Entry Date** and verify the **User** recording the Note, which will default to the current User. Enter a brief Title or Description for the Note in **Regarding**. Complete the Case Note in the text editor field.

4. If **Read Only** is checked, no other Users will be able to delete or edit the Case Note.

5. Record **Services** associated with this Case Note using the lower portion of the form.

6. Select **Save** to finish.

7. Once the Case Note has been entered, it will appear on the Client Case Notes form and can be edited using the **Action** button to the left of the Case Note Date. You can choose to **View Case Note** or **Edit Case Note**, as needed.



8. To print a Case Note, use the **Print** checkbox at the end of each row to select the Case Notes you would like to print. Once checked, select **Print Selected** from the top right-hand corner.

Additional Client Information

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Additional Client Information

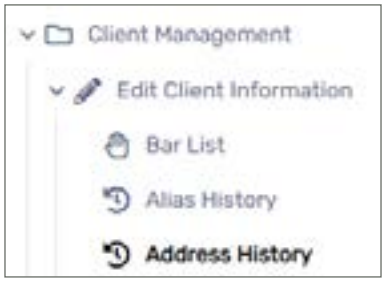
Examples of **Additional Client Information** might be an address or alias history, a list of case managers or interested others, etc. Most of this is usually recorded under the **Edit Client Information** Menu Option. This section details the most commonly used features from this menu.

Address History

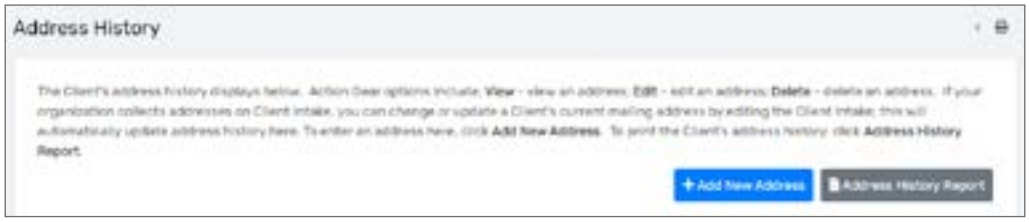
The Address History section provides the current address, as well as a list of previous addresses for the selected Client. Addresses are recorded during Client intake. If a Client has additional addresses that may be useful to track, the addresses can be recorded in Address History.

Recording an Address History

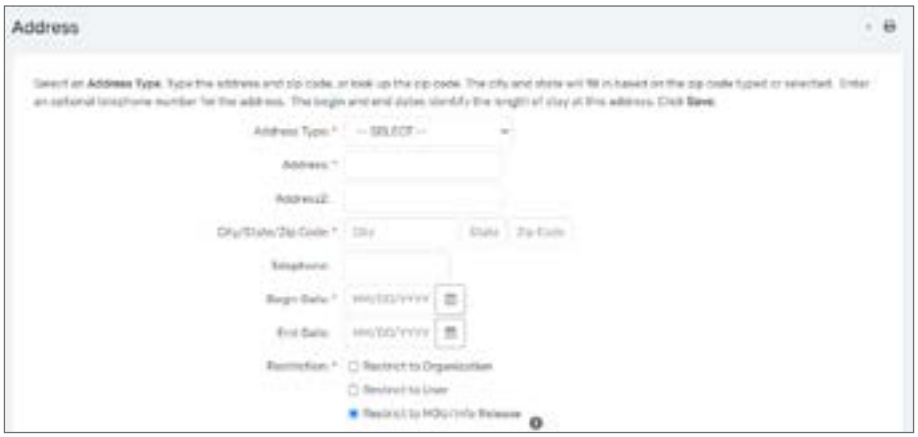
1. Navigate to the Client Workspace and find the Client in question. Under the **Client Management** Menu Group, select **Edit Client Information**, then select **Address History**.



2. The Address History form will display a list of any addresses associated with this Client. To add a new address, select **Add New Address** in the right-hand corner.



3. Enter the required **Address** information, as well as the **Begin** and **End Date** that this address was occupied by the Client.

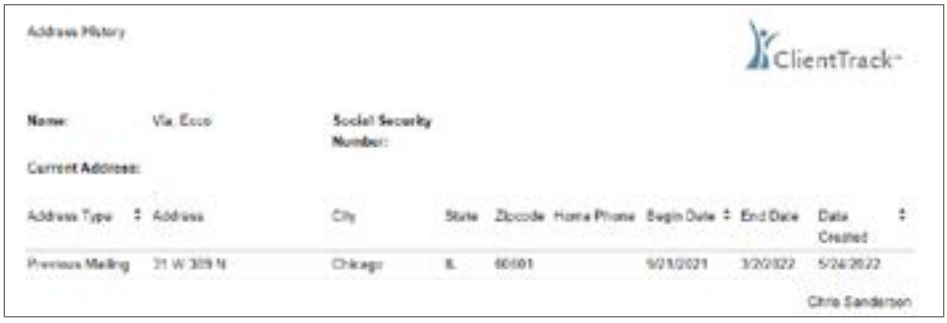


4. Select **Save** to finish.

5. Once the Address has been entered, it will appear on the Address History form and can be edited using the **Action** button to the left of the Address Type. You can choose to **View Address**, **Edit Address**, or **Delete Address** as needed.

6. To create a report of the Client's Address History, on the Address History page, select **Address History Report**.

7. The report will open in a new window. If the report is longer than a single page, the navigation tools at the top of the page will guide you through the document. Results may be displayed in a spreadsheet or PDF.

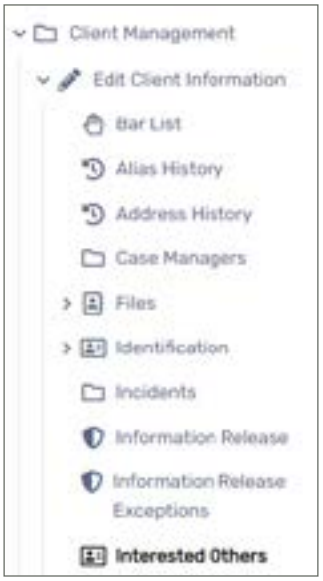


Interested Others

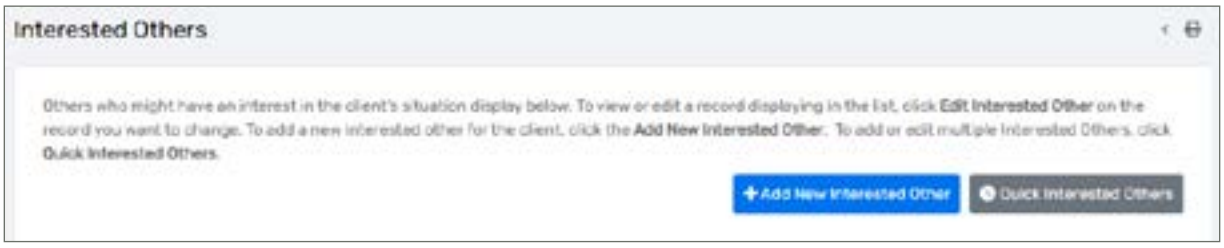
An **Interested Other** is an individual who has an interest or important association with the Client, but has not been recorded as a family member. Information gathered from Interested Others can be used to contact Clients, especially in case of emergencies. Interested Others may include emergency contacts, physicians, counselors, friends, etc.

Creating an Interest Other

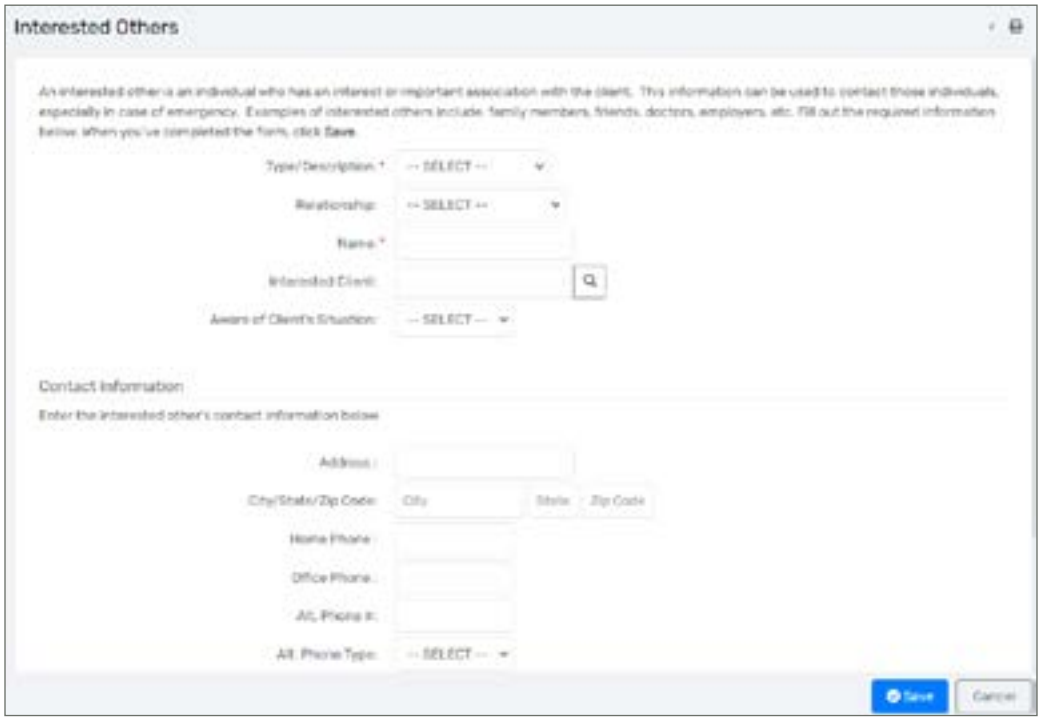
1. Navigate to the Client Workspace and find the Client in question. Under the **Client Management** Menu Group, select **Edit Client Information**, then select **Interest Others**.



2. The Interested Others form will display a list of any individuals associated with this Client. To add a new Interested Other, select **Add New Interested Other** in the right-hand corner.



3. Enter "Other" under **Type/Description** and complete the additional contact information for this individual.



4. Select **Save** to finish.

5. Once the Interested Other has been entered, they will appear on the Interested Others form and can be edited or deleted.

6. To enter multiple Interested Others for a Client quickly, select **Quick Interested Others** from the top right-hand corner of the Interested Others form.

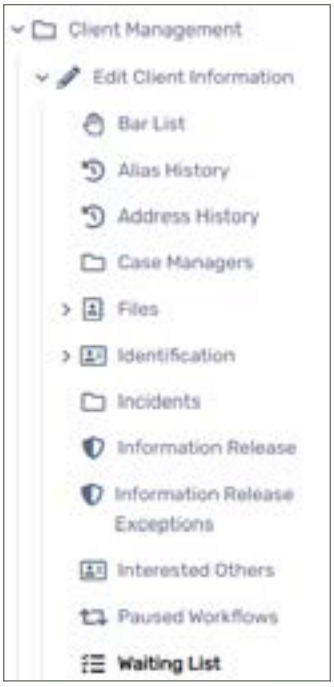
7. Enter information on each row for multiple Interested Others, then select **Save & Close** to finish.

Waiting List

The **Client Waiting List** is a record of the Referrals or Facilities for which the Client has been put on a Waiting List. After Clients are added to a Waiting List, the provider assigned to the Referral is able to access the list from the Wait List in the Provider Workspace.

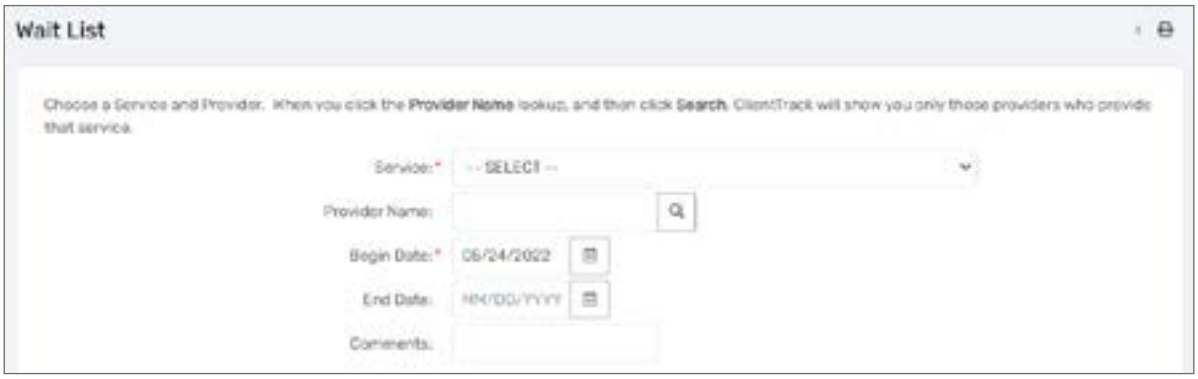
Accessing the Client Wait List

1. Navigate to the Client Workspace and find the Client in question. Under the **Client Management** Menu Group, select **Edit Client Information**, then select **Waiting List**.



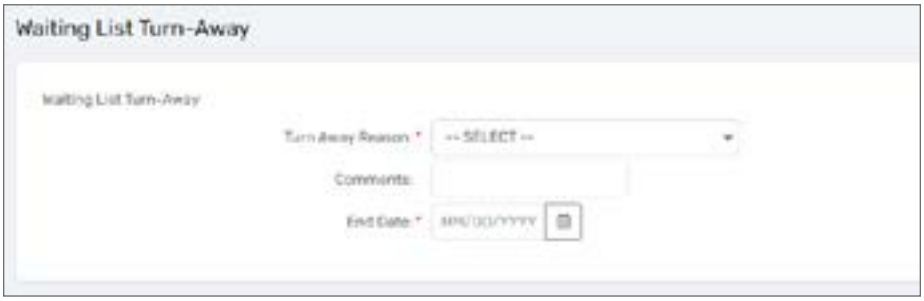
2. The Client Wait List form will display a list of the Referrals or Facilities for which this particular Client is on a Wait List for. To add a new item, select **Add New Wait** in the right-hand corner.

3. On the Wait List form, select a **Service** from the drop down list. Use the **Find** icon to locate a **Provider**. Enter any additional information about the Service or Provider you are arranging for.



4. Select **Save** to finish.

5. Once the Wait has been entered, it will appear on the Client Wait List form and can be edited using the **Action** button. You can choose to **Edit Wait**, **Turn Away**, or **Delete Wait**, as needed. If you select **Turn Away**, a form will open asking for a Turn Away Reason and any applicable comments.



6. You also have the option to Place Client by selecting the blue **Place Client** link at the end of each row on the Client Wait List form. This will open a Service Enrollment form, and will subsequently remove the Client from the Waiting List for this particular Service or Provider.

Bar List

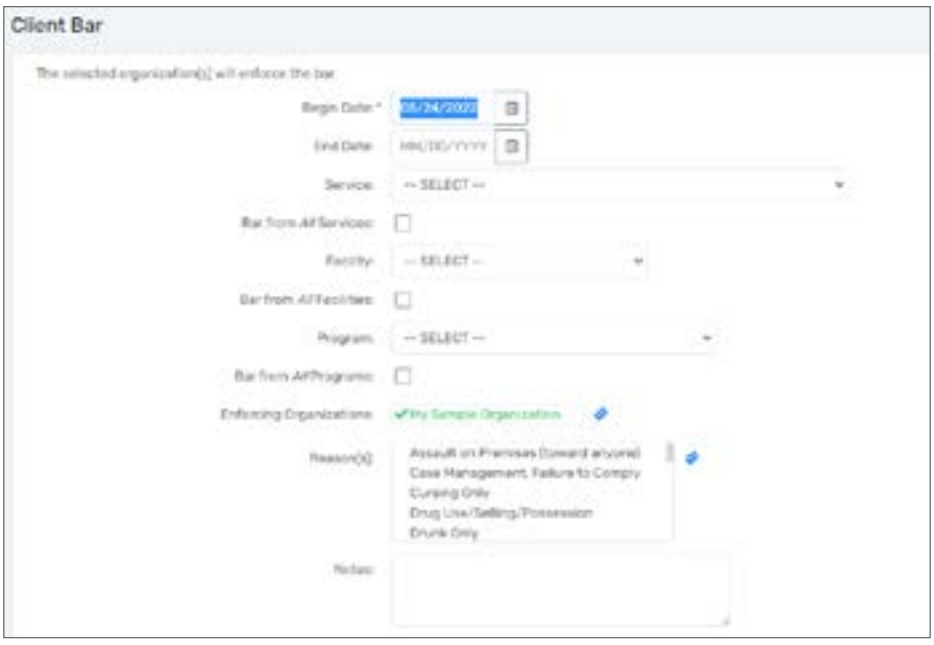
The **Bar List** is a record of all the Services and Facilities from which this Client has been barred. Once they have been barred from a Service or Facility, they will not be able to check in to the Facility or receive the Service.

Viewing a Client's Bar List and/or Adding New Restrictions

1. Navigate to the Client Workspace and find the Client in question. Under the **Client Management** Menu Group, select **Edit Client Information**, then select **Bar List**.

2. The Client Bar List form will display a list of the Services or Facilities from which this Client has been barred. To add a new item, click **Add New** at the top of the form.

3. Complete the information including the **Begin Date** of the barring, as well as the **Service**, **Facility**, and/or **Program**, as well as the **Enforcing Organizations**. If needed, you can select the checkbox to bar a Client from all Services, Facilities, or Programs. Lastly, enter one or more **Reason(s)** this Client is being barred and any applicable **Notes**.



4. Select **Save** to finish.

5. After a Client has been barred from a Service, Facility, or Program, the Barred From items will be displayed on the Client Bar List page. Items listed in the Bar List may be edited or deleted by using the appropriate icons.

6. To bar a Client from multiple Programs, Services, or Facilities at once, you can select either **Bar from Multiple Programs**, **Bar from Multiple Services**, or **Bar from Multiple Facilities** from the top of the Client Bar List.

7. These will each open multi-edit forms where you can scroll through a list of Programs, Services, etc., and use the checkbox to determine which the Client should be barred from. Use the top portion of the form to include a **Begin Date** and **End Date** for the bar, as well as the **Enforcing Organizations** and the **Reason(s)**.

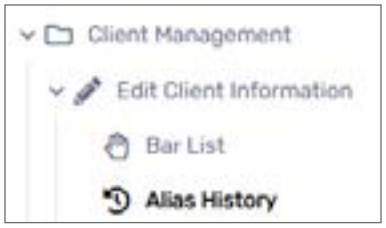
8. Select **Save & Close** to finish.

Aliases

An **Alias** is any name a Client may use to self-identify. An Alias is automatically created behind the scenes when the User edits the Client's name, but additional Aliases can also be added manually.

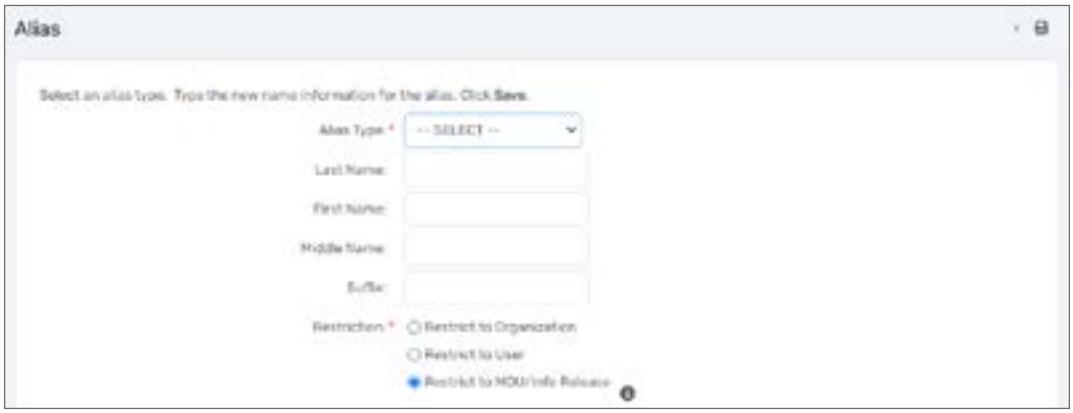
Adding a Client Alias

1. Navigate to the Client Workspace and find the Client in question. Under the **Client Management** Menu Group, select **Edit Client Information**, then select **Alias History**.



2. The Alias History form will display a list of names known to be associated with this Client. To add a new Alias, select **Add New Alias** in the right-hand corner.

3. Select the **Alias Type** and any additional identifying information for this Alias.



4. Select **Save** to finish.

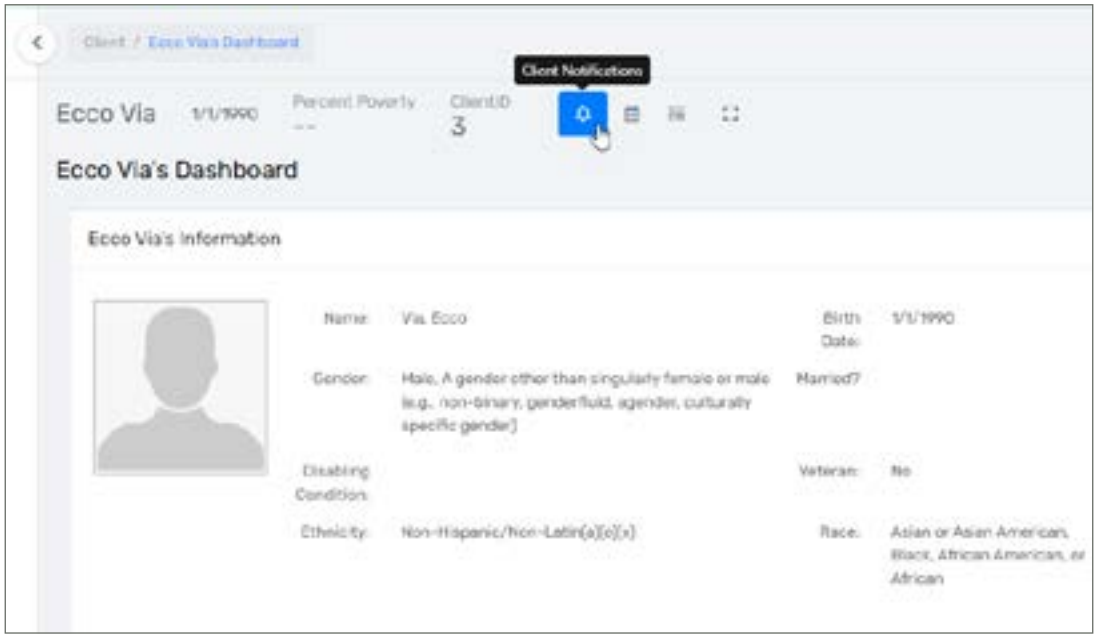
5. Once an Alias has been added, it will display on the Alias History form where it can be edited or deleted.

Notifications

Notifications allow Users to enter alerts regarding a specific Client. These alerts will appear immediately once you select a particular Client, as they are displayed across the entity toolbar on the dashboard.

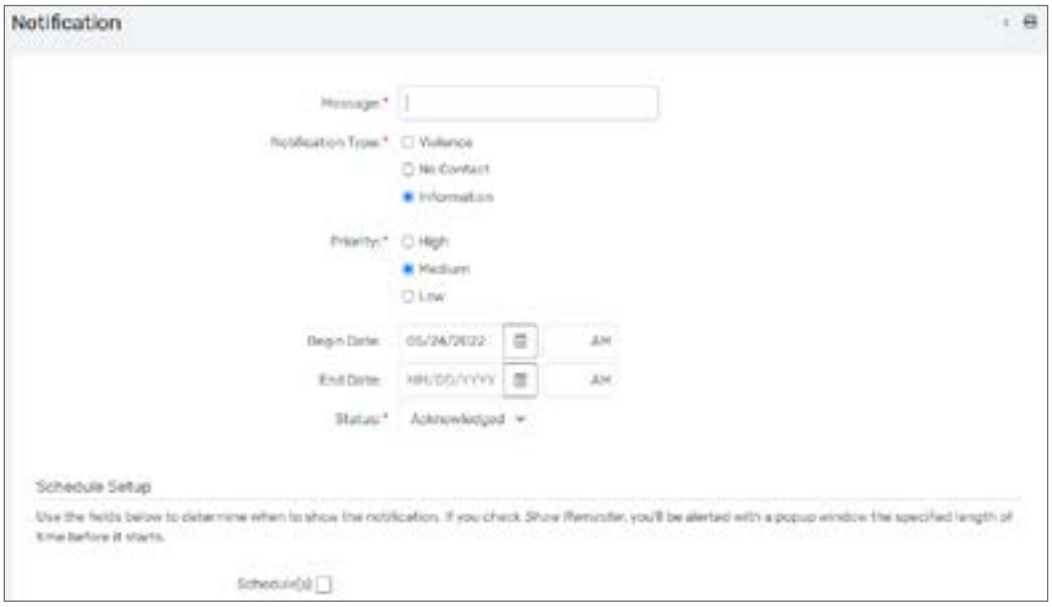
Viewing or Adding New Notifications for a Client

1. Navigate to the Client Workspace and find the Client in question. On the Client's dashboard, select the **Notification bell** icon next to their name.



2. The Notifications/Alerts form will appear. To create a new Notification, select **Add New Notification/Alert** in the right-hand corner.

3. On the Notification form, enter a **Message**, **Notification Type**, and **Priority**. Then enter a **Begin** and **End Date**, and a **Status** (likely "New/Pending" during the Notification creation process).



4. You can also **Schedule** when you would like the Notification to appear.

5. Select **Save** to finish.

Additional Client Information Menu Options include **Case Managers**, which lists a history of the Client's Case Manager assignments, and **Incidents**, which lists out a record of any Incidents on file for this Client. There are also Menu Options for **Files** and **Identification** which are storage locations for important documents, photo IDs, fingerprints, etc.

As with aforementioned Menu Options, these forms will open options to Add, Edit, or Delete new or existing information under each category.

Family Functionalities

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Family Functionalities

Related Clients are often entered into ClientTrack as **Families**. ClientTrack uses the term "family" to refer to a household. A Client may be a member of multiple households, but always has a "primary household" identified.

Accessing Family Information

There are two ways you can access a Client's family members.

You can select the **Expand** button on the Client's dashboard to show their Family Members.

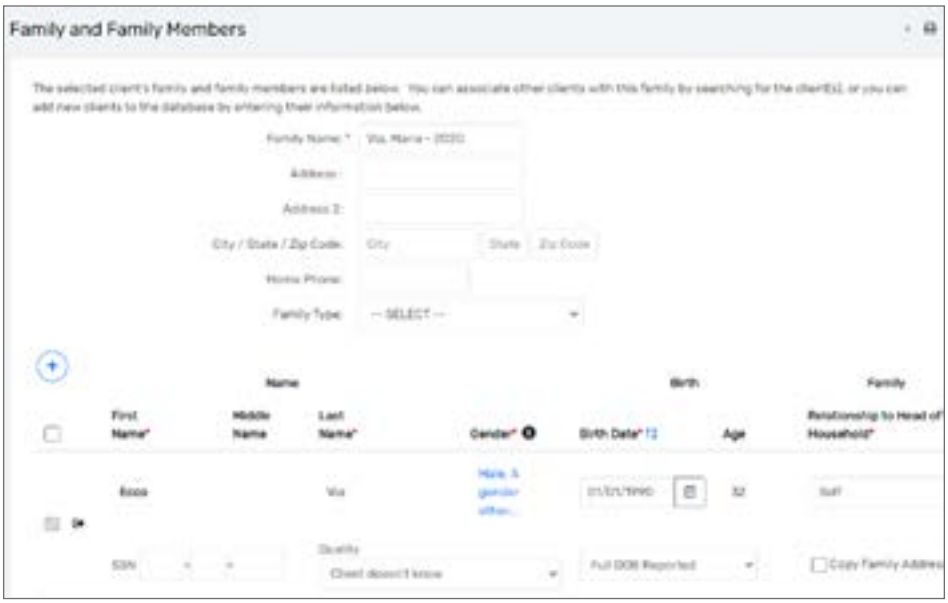
You can also access Family Members of a particular Client by navigating to their dashboard, expanding the **Client Management** Menu Group, and selecting **Family Members**.

Recording a Family

1. Navigate to the Client Workspace and find the Client in question. Under the **Client Management** Menu Group, select **Family Members.**

2. This is a multi-edit form, meaning you can add multiple new Family Members from this form directly. Scroll to the bottom of the list of Family Members and use the fields to enter the necessary information about the individual you are adding to this Family.

> Please Note: You must add to an existing Client. If the Client you are looking to add to the Family does not have their own intake in the system, you will need to add them as a new Client.



4. Once you have entered information in all required fields for the individual you are adding to this Family, slect **Save**.

Adding a New Client to an Existing Family

1. From the Client Workspace, select **Add New Client Intake**.

2. Once you have entered basic demographic information, one of the intake steps will ask if you would like to link them to a Family. To do so, use the **Search** icon next to the Family field. This will open a search box that allows you to either search for an existing Family or add a new Family. Enter your criteria and select **Search**.

3. After locating the Family, enter the **Relationship to Head of Household** that this new individual has.

> Please Note: A wide variety of relationship options allow you to record households that are not necessarily related by family, e.g. "Roomate."

4. Once the intake for this new individual is complete, they will appear as a Family Member of the selected Family.

Adding a New Client to a New Family

1. From the Client Workspace, select **Add New Client Intake**.

2. Enter basic demographic information about this new individual. One of the intake steps will ask if you would like to link them to a Family. Since you will be creating a new Family, you don't need to search for an existing one. Select **Relationship to Head of Household** for this Client, and continue through the intake process.

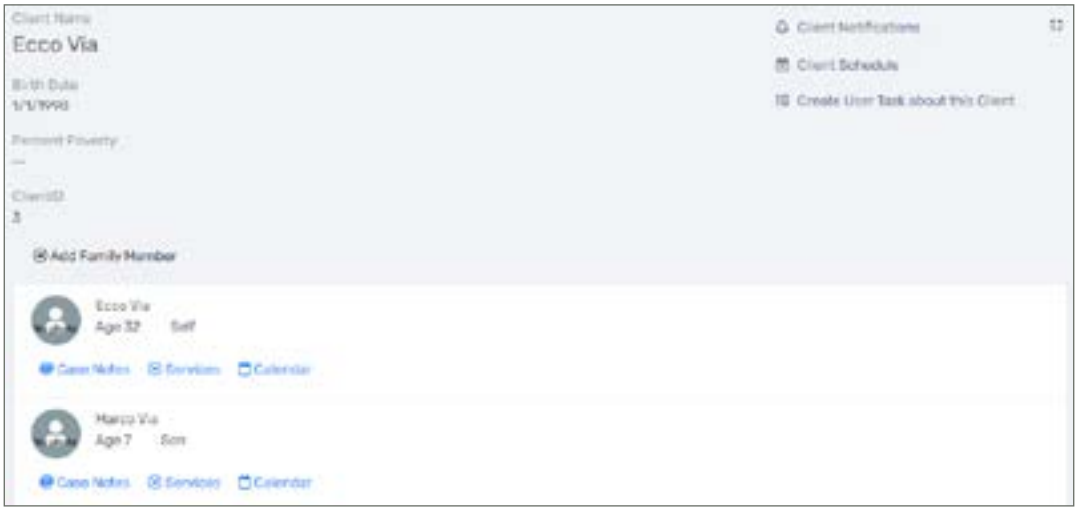
3. Once the Client is added, their Family will be created as well and can be accessed through the **Family Members** Menu Group to view or add members.

Shortcut for Adding a New Client to an Existing Family

1. From the Client Workspace and find the Client who is a member of the Family you are interested in working with.

2. Select the **Expand** icon next to the Client's name at the top of the page.

3. This will open a window that shows current Family Members as well as an option to **Add Family Member**.



4. Since the process of adding a new Family Member involves adding a new Client to the ClientTrack database, the Client Intake page will be displayed. ClientTrack will automatically populate the field for **Last Name** of the new Client. If the last name of the Family Member is different, enter the correct last name.

5. The new Client will be linked to the current Family and ClientTrack will automatically populate the **Family Name** in the **Family and Contact** information fields. The Family Name should not be changed.

6. When all information has been entered, select **Save**.

> Please Note: The window that opens when you select the Expand icon serves as a navigation tool as well. To navigate to a different Family Member's dashboard, simply select their icon. You also have the option to directly select each Family Member's **Case Notes**, **Services**, and **Calendar**.

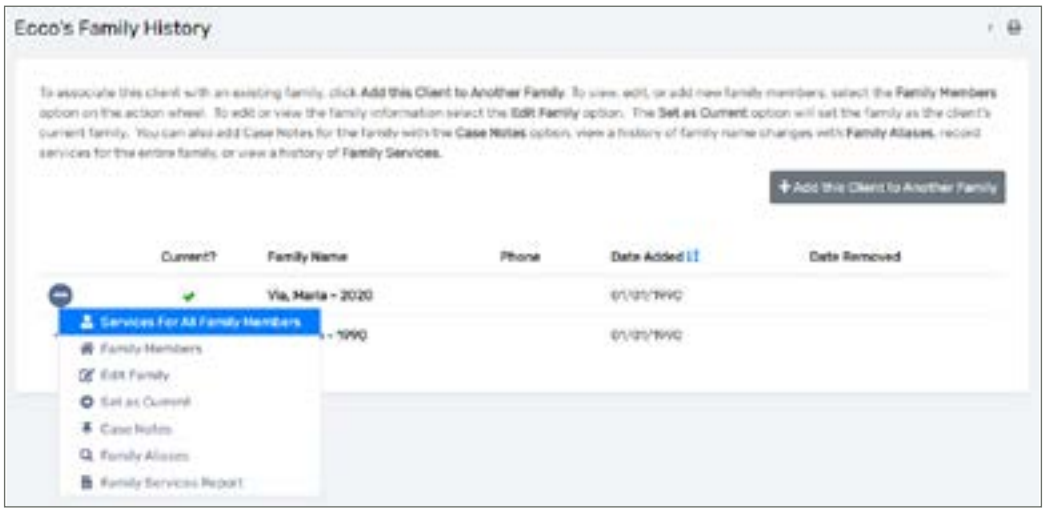
Family Information

Various details of a Client's Family history recorded in ClientTrack are available through the Client Family History page. This information is often used to determine eligibility for certain Grants or funding sources based on information like Family size, monthly income, and number of children.

To access a Client's Family History:

1. Navigate to the desired Client's dashboard and select the **Client Management** Menu Group, followed by the **Family Members** Menu Option. Then select **Family History**.

2. This will open the Family History form. If you select the **Action** button next to a Family Member's name, you can access: **Services For All Family Members**, **Family Members**, **Edit Family**, **Set as Current**, **Case Notes**, **Family Aliases**, and **Family Services Report**.

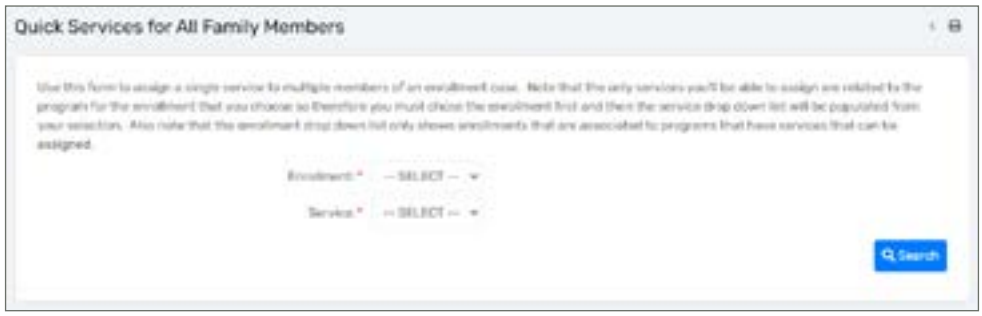


Adding a Service for All Family Members

1. Navigate to the desired Client's dashboard and select the **Client Management** Menu Group, followed by the **Family Members** Menu Option. Then select **Family History**.

2. Select the **Action** button to the left of the Family Name that needs Services added, followed by **Services For All Family Members**.

3. Select the **Enrollment** first, followed by the desired **Service**.



4. Select **Save & Close** to finish. You will be redirected to the previous Menu Option.

ClientTrack Calendars & Events

ClientTrack® by eccovia

ClientTrack Calendar & Events

ClientTrack has two calendar perspectives: the **Client Calendar** and the **User Calendar**. The User and the Client Calendars provide configuration options and schedules relative to the current User or the selected Client. Each Calendar view can be switched to a day planner to view schedules on an hourly basis for any day of the month.

User and Client Calendars

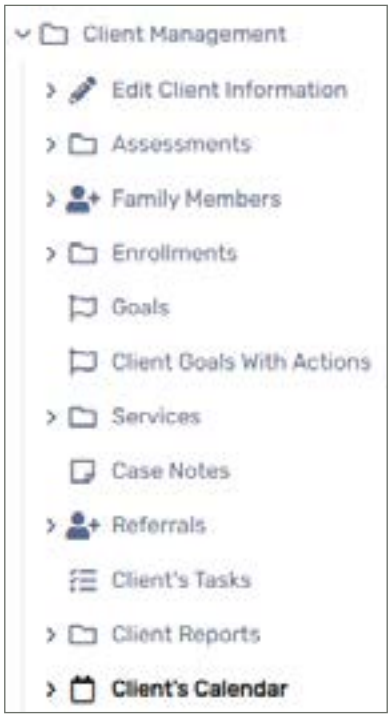
The process to schedule events and navigate within the User Calendar and Client Calendar are essentially the same.

To Access the User Calendar

1. Navigate to the **Home** Workspace and select the **My ClientTrack** Menu Group, then select **Calendar**.

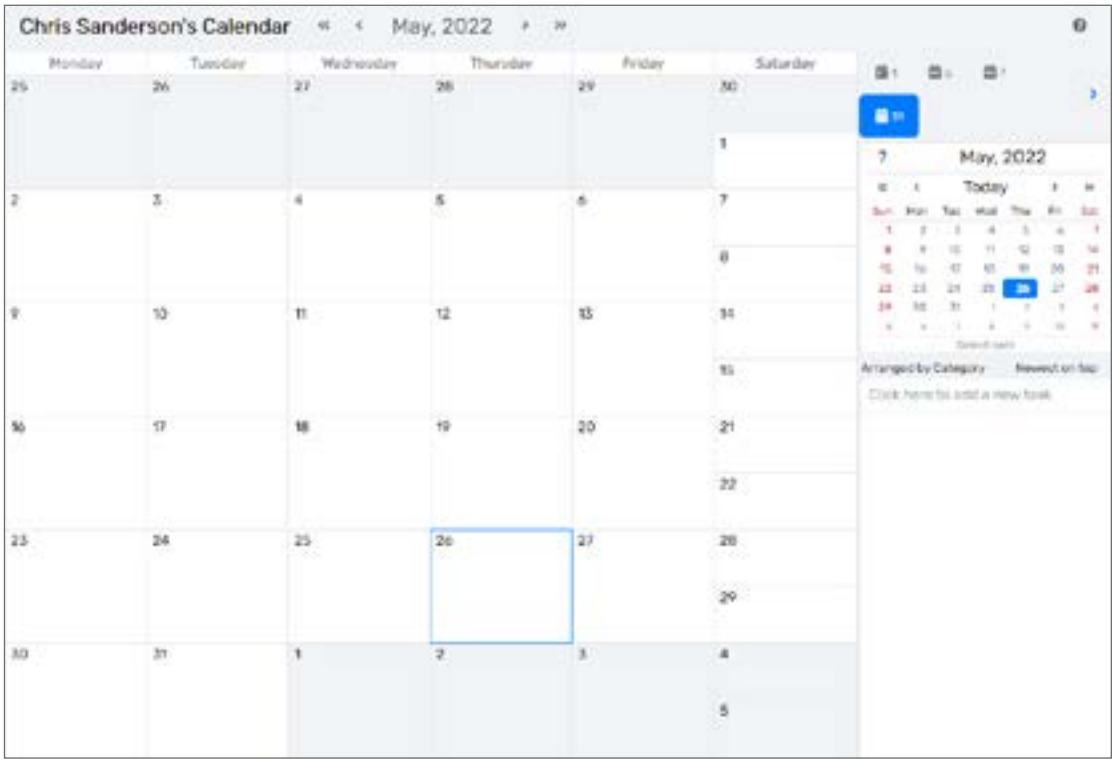
To Access the Client Calendar

1. Navigate to the **Client** Workspace and find the Client in question. Select the **Client Management** Menu Group, then select **Client's Calendar**.



Navigating the Calendar

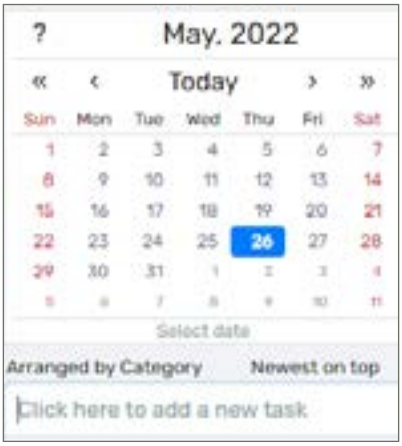
1. This will open the User's personal Calendar. Note the **View** options in the top right-hand corner above the Calendar itself. These allow you to display either one single day (1), one business week (5), one full week (7), or one full month (31).



2. To change the Calendar month or year, select the **Arrows** at the top of the page. The same navigation features are available in the mini Calendar in the top right of the page.

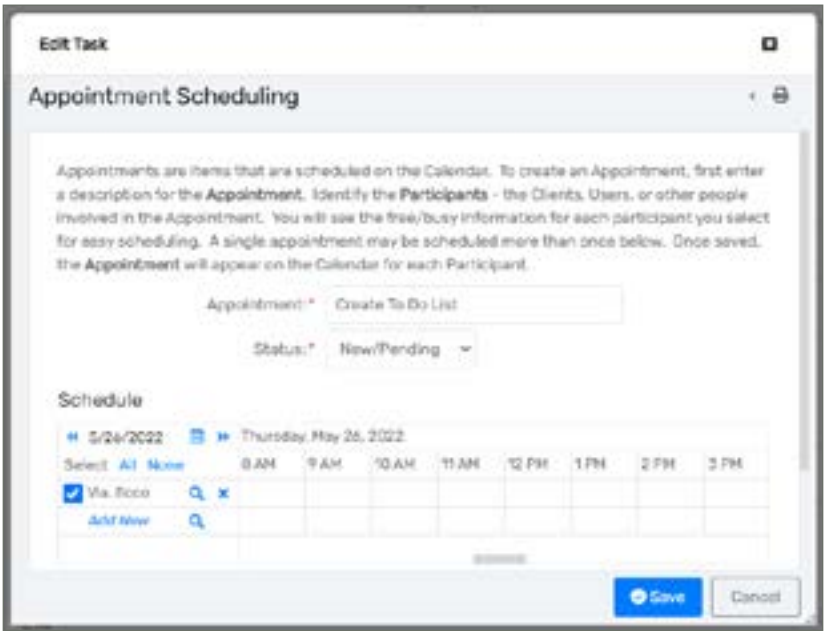
Adding Calendar Tasks

1. The **Task** pad below the mini Calendar on the right-hand side of the screen is where you will add any tasks to your Calendar. Click in the open text box that reads **Click here to add a new task**.



2. Type a **description** of the new Task and press **Enter** on your computer keyboard. The Task will move to the top of the list in the Task pad.

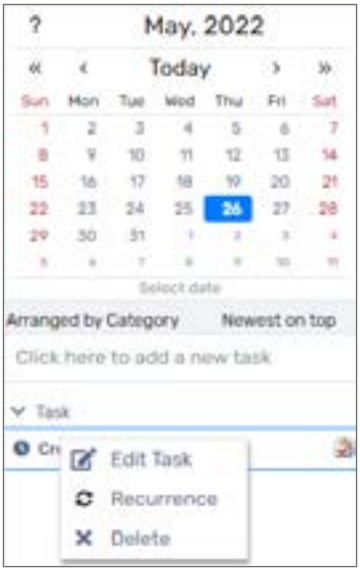
3. To schedule the **Task**, select and hold down on the Task, then drag it onto the Calendar to schedule on a specific date. You can also double-click on the Task. This will open a new window that will allow you to schedule the **Event**.



4. ClientTrack automatically fills the **Start Date**. Enter an **End Date** or select the small **Calendar** icon to select a date. Enter a **Start** and **End Time**, then select **Save**.

5. The Task will now appear on the Calendar. Note that if the date range spans across multiple days, the Task will appear on each day for which it is scheduled. Hovering over the Task with your mouse will open a small window displaying additional details.

6. Existing Tasks can be edited by right-clicking on the Task in the Task pad. From there, you can **Edit Task**, schedule a **Recurrence** (detailed in the next section), or **Delete** the Task.



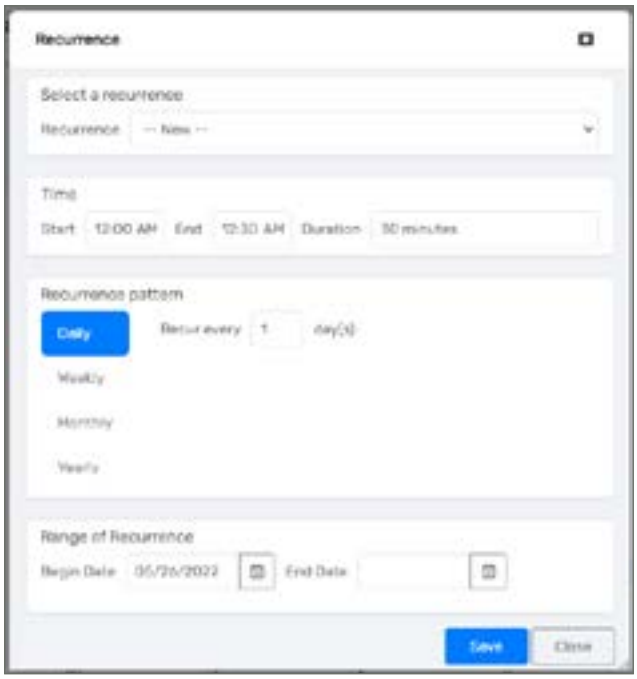
Recurrences

Each Task can be scheduled on multiple days and at multiple times throughout the day. The Recurrences tool allows you to set a pattern that will automatically schedule Recurring Tasks rather than having to create individual schedules for each day.

Setting Up a Recurrence

1. Navigate to the **User** or **Client Calendar**.

2. In the Task pad on the right-hand side of the screen, right-click on the **Task** you wish to schedule on a recurring basis. A small window will open. Select **Recurrence**.



3. On the Recurrence form, type a **Start** and **End** time and complete the desired recurring **Pattern** and **Range**.

4. Select **Save** to finish and close the window.

5. The event will then appear on the Calendar according to the Recurrence schedule created on the Recurrences page.

6. To modify or delete the current Recurrence, change the **Recurrence Pattern** and/or the **Range of Recurrence** as desired, then select **Save**.

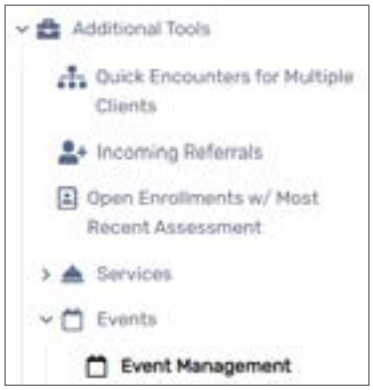
7. To delete the Recurrence, select **Remove Recurrence** in the Recurrence window.

Event Management

Outside of the standard calendaring abilities, ClientTrack offers **Event Management** functionality to create and manage attendance of events held by your Organization.

Creating an Event

1. Navigate to the **Home** Workspace and select the **Additional Tools** Menu Group, then select the **Events** Menu Group, followed by **Events Management**.

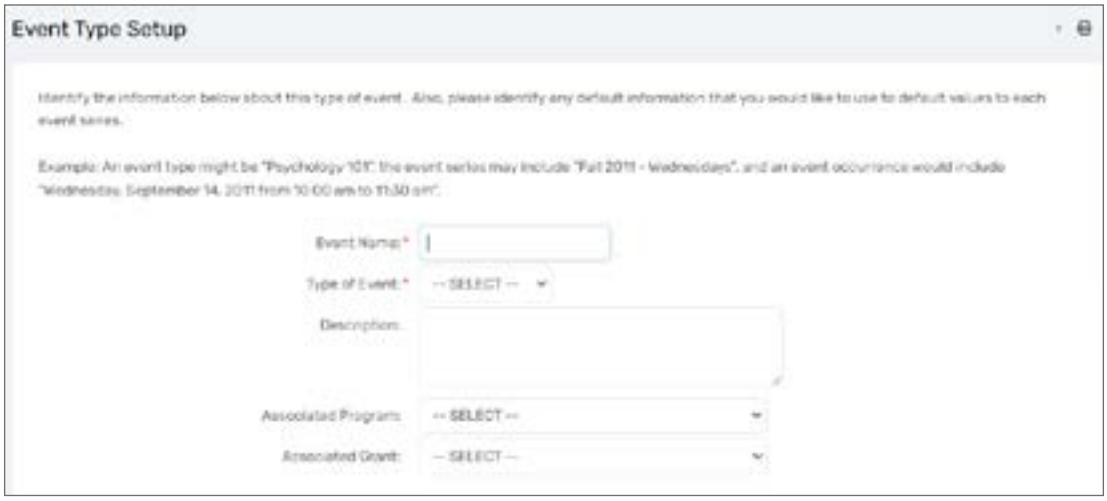


2. This will open the Event Type form which displays Event Types that are accessible to your Organization. Each Event Type has one or more Scheduled Series related to that Type. Clients, Users, and other individuals can participate in the Series as scheduled Participants.

3. This will open the Event Type form which displays Event Types that are accessible to your Organization. Each Event Type has one or more Scheduled Series related to that Type. Clients, Users, and other individuals can participate in the Series as scheduled Participants.

4. To add a new Event, select **Add New Event Type**.

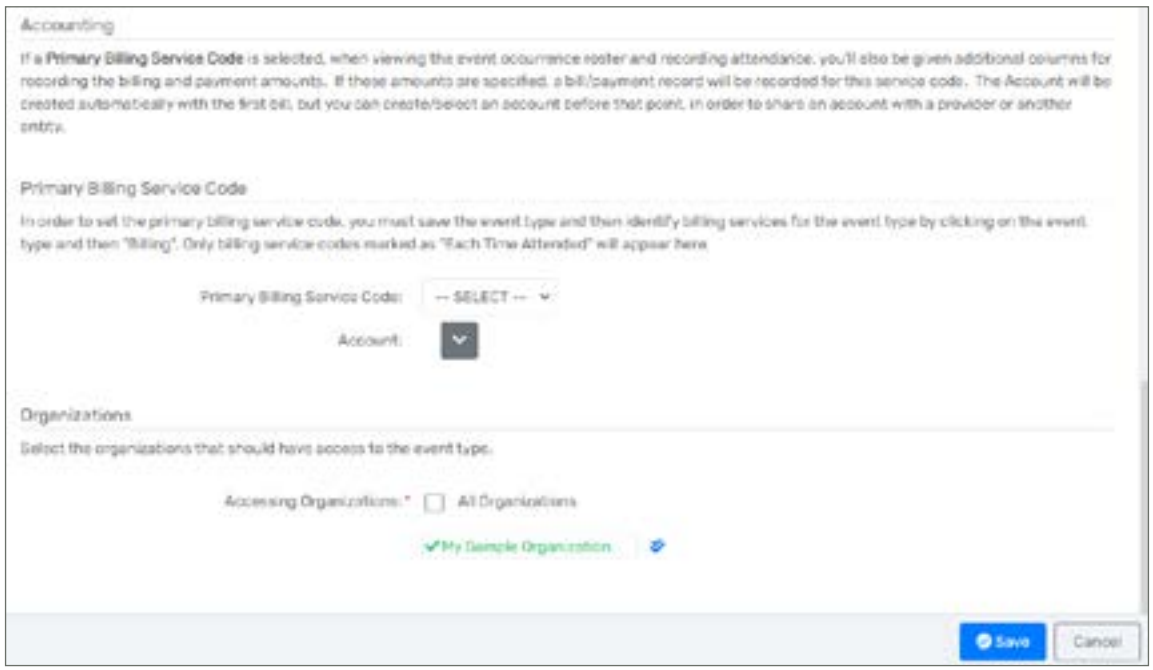
5. Enter the **Event Name**, select a **Type of Event** from the dropdown list, a **Description**, and **Associated Program** or **Associated Grant**, if applicable.



6. Next, select a **Service Code**. As noted on your screen, if a **Service Code** is selected, whenever attendance is recorded for an Event occurrance, a Service Record will be created for the attendee (or an Indirect Service if the attendee is not a Client).

7. Then enter the Event **Provider** and their **Location**, if applicable. Enter **Default Information** such as the required age, event language, minimum and maximum capacity, etc.

8. Lastly, enter any **Billing** information, if applicable. Select **Save** to close.

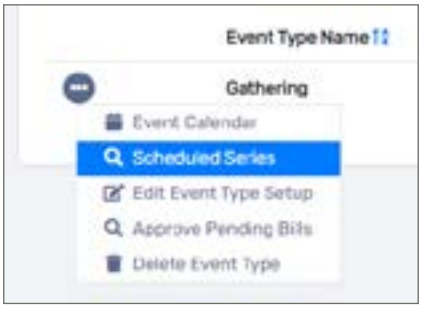


9. Once the Event has been created, it will appear on the Event Type form. You can use the **Action** button to access certain actions: **Event Calendar**, **Scheduled Series**, **Edit Event Type Setup**, **Approve Pending Bills**, and **Delete Event Type**.

Scheduled Series

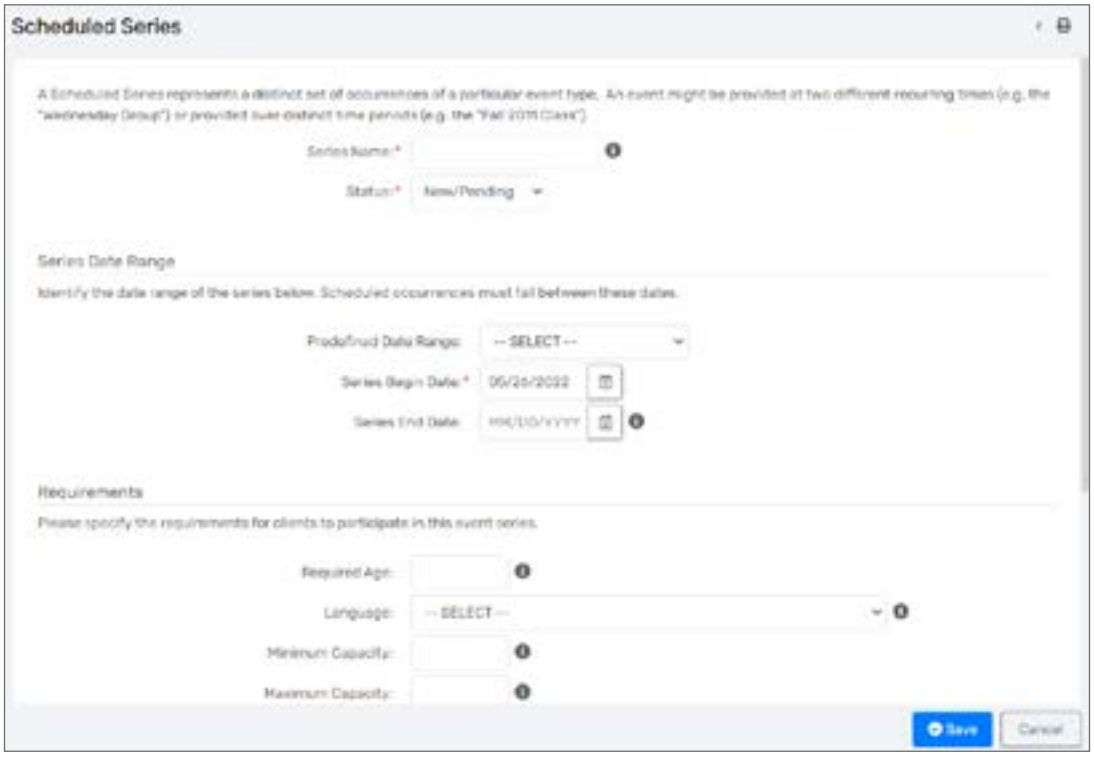
An Event needs to have a **Scheduled Series**, even if an Event will only occur on one single date. The Scheduled Series defines the characteristics that allow a Client to be registered for an Event.

1. Scheduled Series are managed by selecting the **Action** button next to the appropriate Event Type and then selecting **Scheduled Series** from the dropdown list.



2. Select Add New Scheduled Series in the right-hand corner.

3. On the Scheduled Series form, enter the **Series Name**, **Status**, **Dates**, and verify the requirements set when you created the Event Type.



3. Check the **Scheduled Occurrences** checkbox to select additional dates for this series to be scheduled on. Use the **Plus Sign** icon to add a new scheduled occurrence line.

4. Once your Scheduled Series has been added, it will appear on the list under Scheduled Series.

5. Further action can be taken by selecting the **Action** button, including:

    a. **Edit Scheduled Series** - Opens the Scheduled Series setup form.

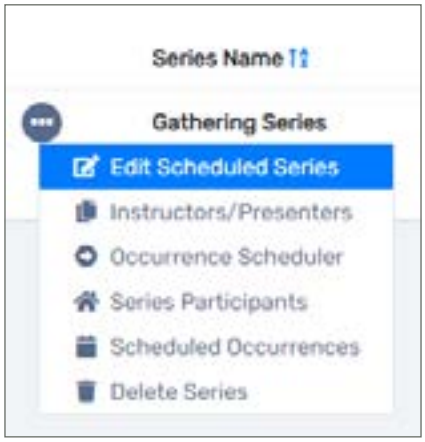
    b. **Instructors/Presenters** - Allows you to view any Instructors listed currently, or Add New Instructors and their associated Provider, if applicable. More than one instructor or presenter can be added, if needed.

    c. **Occurrence Scheduler** - Opens a new window allowing you to schedule a Recurrence of this event. For example, you can select a Recurrence of this Event weekly on Mondays and Wednesdays.

    d. **Series Participants** - Allows you to Add One Participant or Add Multiple Participants for this particular scheduled Event.

    e. **Scheduled Occurrences** - Displays a list of occurrences that have been created for this Event. They can be edited or added from this form as well, as opposed to editing the original Scheduled Series form.

    f. **Delete Series** - Removes this series from the list.

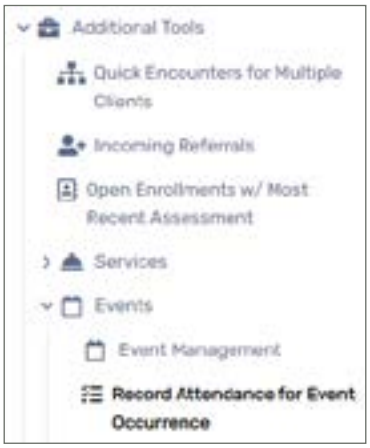


Event Attendance

Once your Event has been created, scheduled, and participants added, you will want to record the attendance.

Recording Event Attendance

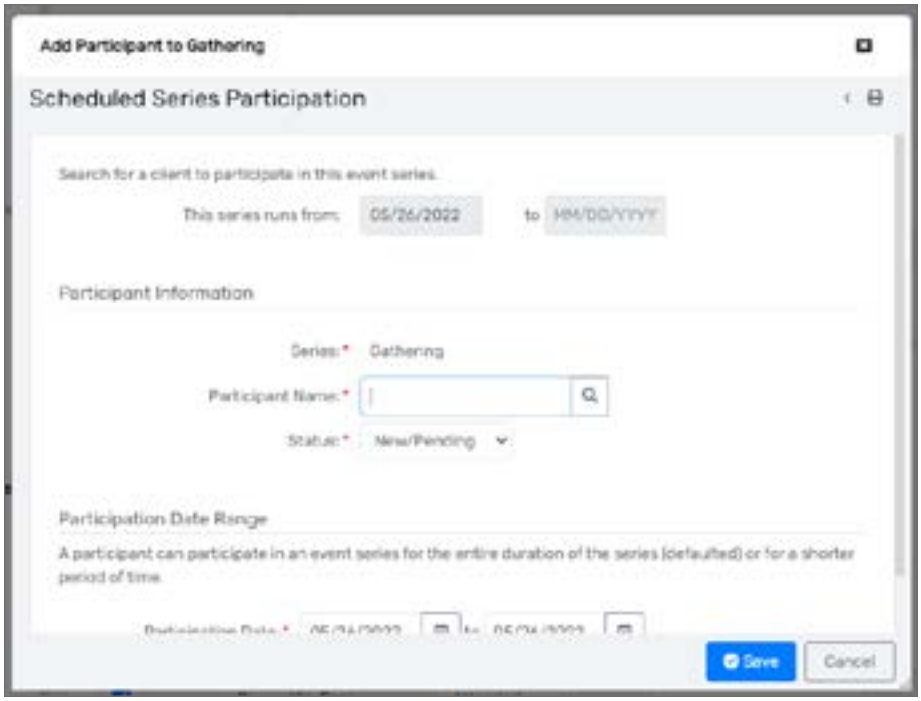
1. Navigate to the **Home** Workspace and select the **Additional Tools** Menu Group, then select the **Events** Menu Group, and select **Record Attendance for Event Occurrence**.



2. The Record Attendance for Event Occurrence form will have you select the **Event Type**, **Event Series**, and **Event Occurrence** at the top of the form before the ability to Add Participants appears on the bottom of the form.

3. Once your Event is selected, the individuals that were added as Participants during the setup of the Event will appear at the bottom of the form where you can select the **Outcome** from the dropdown list indicating their attendance status.

4. You can also select **Add Participant** to open a new window and enter Participant information. Use the **Find** icon to locate existing Clients that may not have been added to the list of Participants previously. Once their information has been entered, select **Save** to close.



Reporting

ClientTrack® by eccovia

Reporting

ClientTrack offers powerful reporting capabilities in both standard and customized formats. The following section describes the Reports included in the baseline ClientTrack platform. Depending on your unique Organization and implementation functionality, the specific array of Reports available to you may differ.

Standard Reports

Standard Reports span a wide variety of data elements and are often categorized by what is being reported on. For example, your ClientTrack solution may contain one or more of the following:

- **Client Reports** - including Client Demographics, Client Barriers, Client Goals, Duplicated Clients, etc.
- **Program Reports** - including Clients in Programs, Enrollments Barriers, Enrollment Demographics, Cross Program Participation Report, Case Assignment, etc.
- **Service Reports** - including Service Summary, Service by Provider, Clients Served, Reason for Service, Turn Away Reason, Frequently Served Clients, etc.
- **Referral Reports** - including Referrals to Providers, Refer to Provider by Service, and Referral from Provider.
- **Provider Reports** - including Provider Services and Facility Summary

> Please Note: Different kinds of Reports can be accessed from the Workgroups to which they pertain — Client Reports from the Client Workspace, etc. — but all Reports in ClientTrack baseline are available from the Home Workspace.

Accessing Reports

1. On the **Home** Workspace, select the **Reports** Menu group. From here, you can select the Report necessary.

When you select a Report, you will be brought to a form with multiple filters, allowing you to select extensive data parameters to narrow down your reporting results.

Saved Report Settings

Saved Report Settings can be used to save the exact parameter settings so they can be selected again for convenience. Once you have selected all of the Report Settings you would like to save, select **Save Settings** from the dropdown list and enter a description.

Date Range

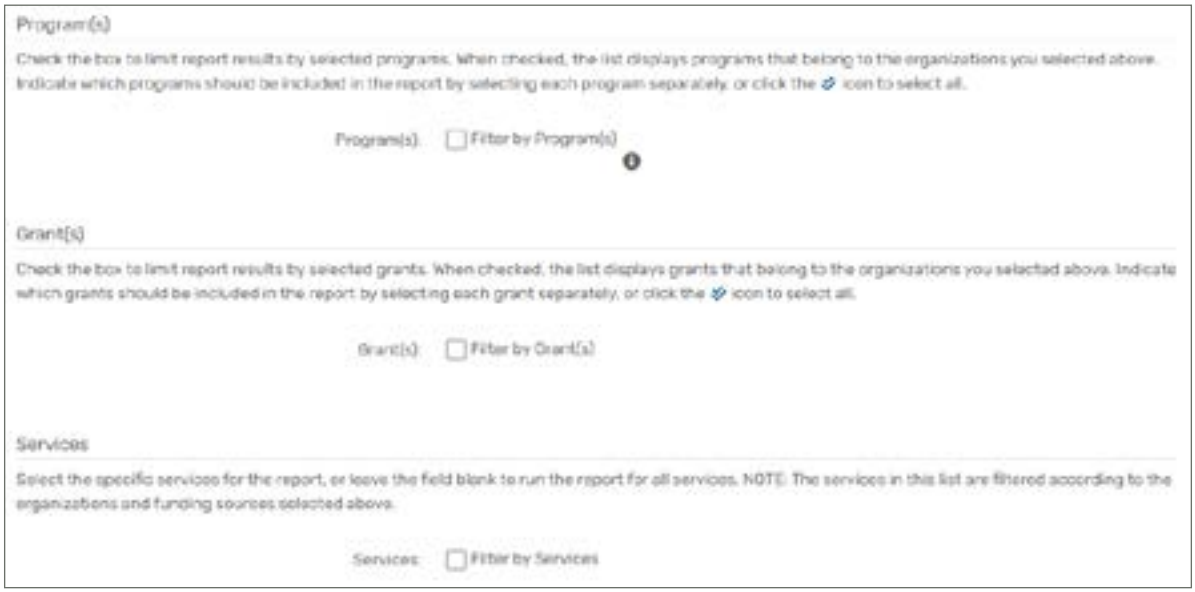
Date Range indicates the time period that the records in this Report need to fall into. You can select a Predefined Date Range, such as "Previous Month" or choose actual specific dates, if needed.

Organization

Organization indicates which Organizations should be included in the Report, by selecting each **Organization** or selecting the green check mark to select or deselect all.

Programs, Grants, Services, Users and Housing Status

Programs, Grants, Services, Users, and **Housing Status** will limit Report results by selected entities. For example, you may only want to see Case Management Services provided by a specific Program and Grant, created by a certain User, and provided to Clients with a Housing Status of "Homeless." Check the box next to each if you intend to use these filters, and an additional box will appear, allowing you to check off **Programs**, **Grants**, **Services**, etc.



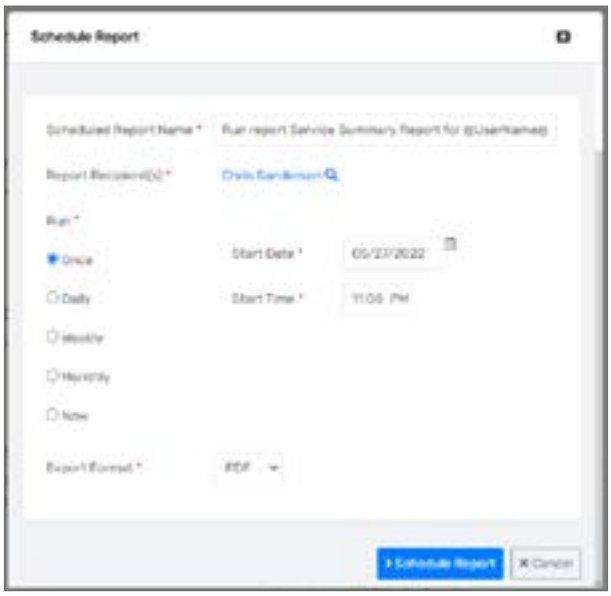
Other Report Settings

Not all of these filters will appear on every Report screen - filters will vary depending on which Report you have selected.

Once you have entered your parameters, you can either select **Report** or **Schedule Report**.

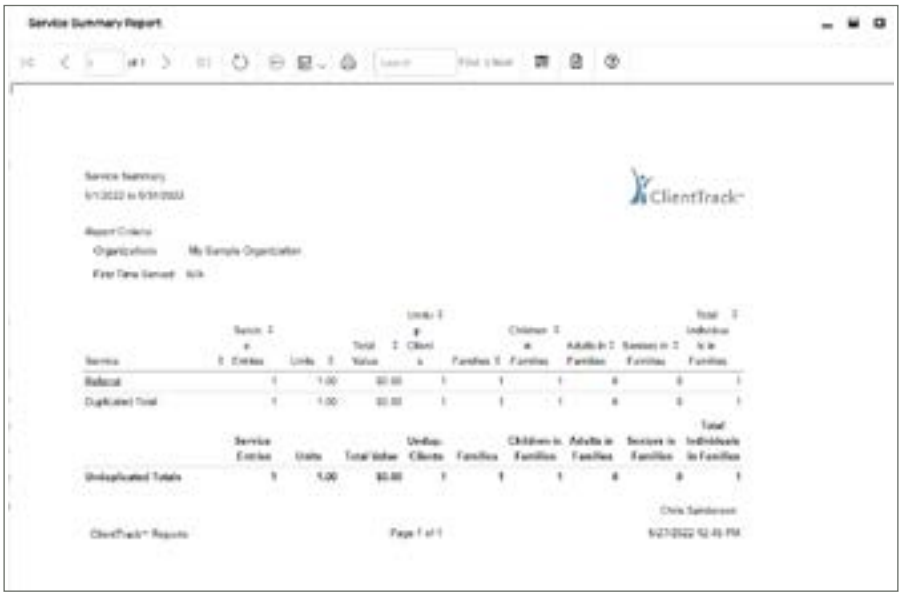
Schedule Report

Schedule Report allows you to schedule a Report to be run at a later point in time. A new window will appear, allowing you to enter the **Scheduled Report Name**, **Report Recipients**, when the Report is to **Run**, the **Start Date** and **Start Time**, and the **Export Format**. Once selected, select **Schedule Report**.



View Report

Simply selecting **Report** from the Report parameters page will open the Report in a new window. You can click through the pages of the Report using the **arrows** at the top of the new window. You can also type keywords into the open text field and select **Find/Next** to locate throughout the Report. The **Save** icon presents a dropdown menu, allowing you to choose an export format - Excel, Excel Data, Word, or PDF. You can also print the Report by selecting the **Printer** icon.



HMIS Reports

Similar to the Standard Reports, ClientTrack includes **HMIS Reports** and other Compliance Reports that may or may not be present in your solution depending on your Organization's needs.

HMIS Reports also include reporting parameters options that can be selected prior to running or scheduling a Report.

Data Explorer

Data Explorer is a reporting tool, with the ability to access Client-level data. Therefore, a User must have the **Data Explorer Read/Write Permission** and be in a Workgroup that contains the **Data Explorer** Menu Option to access its functionality. The User must also be logged into an Organization that has access to the Client's data in the Organization the Report is being created for.

Navigation

1. On the **Home** Workspace, select the **Reports** Menu group, then select **Data Explorer**.

Questions

A **Question** is a Report created in Data Explorer on a specific set of data in ClientTrack. Questions can be copied and edited when a User's new Question is similar from another, older Question. New Questions should be created when the User has a Question that is about a set of data that is very different than previous User Questions. When creating a Question, **Run/Edit Permissions** are determined. Below is a breakdown of these options.

Permission	Description
Me Only	The Question will only be visible or editable by your User account.
My Organization	The Question will only be visible or editable by Users logged into your Organization.
Everyone	All ClientTrack Users will be able to see or edit the Question.

Data Explorer Domains

Domains are utilized in Data Explorer as the basic building blocks of any Question. A Domain is a set of data that you may want to view in your Question or use to filter your Question results. Common Domain examples include Client, Service, and Enrollment Domains. Domains are usually built around a single form so that forms' data can be used in the Question.

Joining Data Domains

Users will find that a very large amount of analysis can be conducted in Data Explorer by utilizing just a single Domain. However, there are scenarios whereby Users may want to relate two or more Domains together in order to conduct advanced analysis. For example, if a User wanted to know the total number of Services provided in a given date range, they can simply utilize the Service Domain only. However, if the same User wants to filter Question results by a particular gender, then they would need to join the Service Domain to the Client Domain. Data Explorer includes the ability to simply and easily join Domains together and manage the relationships between these sets of data.

Selecting Available Columns

Users can select on the Domain's cylinder **Data** icon to see which columns are available within the selected Domain. Available columns are listed alphabetically. To add a column to your Question results, simply select an available column and drag the column to the green area in the Question Results Area. Users can determine the order in which columns are displayed in the Question results area by dragging and dropping column headers to the left or right of existing column headers.

Filtering Question Results

Users can select the Domain's **Filter** icon to see which Filters are currently being utilized by the Question. If no Filters have previously been identified for the Question, the Domain Filter dialogue box will show a single Filter of "1 = 1" (since this is always true, all data will be displayed in the Question results). Users could change the existing Filter, delete this Filter, or add a Filter.

Filter Components

Each Question Filter includes three basic components: a left-side comparison, a comparison type, and a right-side comparison. This format enables Users to identify one value to be compared to another value in multiple ways. A left- or right-side comparison of a Filter usually represents a value that the User has entered, a column in the Domain. Users can select on the left- or right-side comparison to change it. The most common use of Filters will be to identify a Domain column on the left-side and a value on the right-side. Select the left-side comparison, move your cursor over the Domain name, and then select a column within that Domain to Filter Question results by values in that column.

Comparison Types

Data can be filtered in multiple ways to include only the results the User wishes to see. The default Comparison Type "=" will only display results when the left-side comparison value is equal to the right-side comparison value. Details about each Comparison Type are listed here:

Comparison Type	Description
=	Question results will only include records where the left-side value is equal to the right-side value.
>	Question results will only include records where the left-side value is greater than the right-side value.
>=	Question results will only include records where the left-side value is greater than or equal to the right-side value.
<	Question results will only include records where the left-side value is less than the right-side value.
<=	Question results will only include records where the left-side value is less than or equal to the right-side value.
<>	Question results will only include records where the left-side value is NOT equal to the right-side value.
IN	Question results will only include records where the left-side value is included in a list of values on the right-side (e.g. 'Male, 'Female').
NOT IN	Question results will only include records where the left-side value is NOT included in a list of values on the right-side value (e.g. 'Male', 'Refused').

Comparing to a Value From Pre-Populated Values

Many Filter values are simple because ClientTrack automatically identifies a list of values that you may want to use to Filter. Users may select from a list of pre-populated values in instances where there is a pre-defined list of values (e.g. a list of genders or races). Users may select a value selection and select **Done**. Some filters do not have a list of pre-populated values that Users can select from (e.g. filtering by a date or a number like age). Here are some tips for Filtering on these types:

Comparison	Description
Comparing to a Specific Date	When entering a date value for comparison, Users should enter the date with single quotes on each side of the date and show the full date format as 'mm/dd/yyyy'.
Comparing to a Specific Number	When entering a specific number, Users should enter the number without any quotes (e.g. 5).
Comparing to a Literal Text Value	When comparing to a literal text value (e.g. filtering records where last name is equal to "Thompson"), Users should use single quotes to enter the text value (e.g. 'Thompson').
Comparing to a List of Values (for IN and NOT IN comparisons only)	When comparing to a list of values, Users should enter multiple values separated by a comma (e.g. 'Male', 'Female'). Additionally, Users can select from a list of pre-populated values and hold Shift while selecting multiple values.

Data Explorer Toolbar

This area includes basic Data Explorer options that are always available. The name of the Question you are working on it also presented in this toolbar. From left to right:

Name	Description
New Question / Open a Different Question	This icon is utilized to create a new Question or open a different Question without leaving Data Explorer.
Save Question	This icon is utilized to save the changes you have made to the current Question.
Edit Question Properties	This icon is utilized to change the basic properties of the current Question including Question name and edit or view permissions that were originally set when you created the Question.
Parameters	This icon enables advanced Users to setup and manage Question parameters. Question parameters are utilized when you want to filter a Question's results every time you process the Question, but you want ClientTrack to ask you for how to filter the results.
Process Question	Users can select this icon to process the Question as currently created.
Excel Export	This icon is utilized to export the Question results to Microsoft Excel.

Creating a New/Copying Existing Question

1. To copy an existing Question, select the **Copy and Edit** icon next to the Question needing to be copied and change the **Question Name** and **User Access**, if applicable.

2. To create a new Question, select **New Question**, enter the Question Name and identify which Users will be able to edit and run your Question. You will have the ability to change these Question attributes later, if necessary.

3. Select/change the necessary **Domains** and choose the appropriate **Joins** for each Domain connection.

4. Select/change the **Columns** of data that are needed in the Question's result. These Columns can be dragged and dropped to change the order. The results can also be sorted by specific Columns.

5. Select/change the **Filter** to identify a value(s) that the Question should use. Make sure to include all three basic Filter components: a left-side comparison, a comparison type, and a right-side comparison. The dialogue boxes provide instructions on how to identify values.

6. Once all the necessary Columns and Filters are selected, select **Show Me** to see the results of your Question. These results can be exported or visualized using the **Visualize** link and functionality.

Data Explorer Examples

The best way to learn Data Explorer is logging in and trying it out. As you become more comfortable with the tool, you may find it useful to challenge yourself with these or other real world examples.

Each example will identify a data need or question to be answered. Try answering the question with your own data. Once you have attempted the answer, review the solution to enhance your skills. It is important to note that there are multiple ways to answer the same question.

Question / Data Need

Show the name and birth date of all Clients that were created by Organization XYZ since January 1, 2010 sorted alphabetically.

Solution

- Domain(s): Client
- Query Results include Full Name and Birth Date
- Query Filter(s) include Gender = 'Female' and Created by Organization = 'XYZ'
- Sort by Full Name (Ascending)

Data Explorer Examples (cont.)

Question / Data Need

Show an unduplicated count of all Multi-Racial individuals broken out by gender.

Solution

- Domain(s): Client
- Query Results include Gender, Client ID (Summarization: Distinct Count)
- Query Filter(s) include Race = 'Multi-Racial'
- Sort by Gender (Ascending)

Question / Data Need

What is the average number of units provided for each service instance this year, broken out by service type?

Solution

- Domain(s): Service
- Query Results include Service, Units (Summarization: Average)
- Query Filter(s) include Service Date >= '01/01/20XX', Service Date <= '12/31/20XX' (Use current or previous year)
- Sort by Service (Ascending)

Question / Data Need

What is the total number of units of service provided to all individuals over the age of 18?

Solution

- Domain(s): Service joined to Client
- Query Results include Units (Summarization: Sum)
- Query Filter(s) include Age as of Today > 18

Question / Data Need

Show a list of all Clients that have received a service this year and the total number of services they have received this year.

Solution

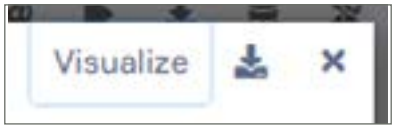
- Domain(s): Client joined to Service
- Query Results include Full Name, Service ID (Summarization: Count)
- Query Filter(s) include Service Date >= '01/01/20XX', Service Date <= '12/31/20XX' (Use current or previous year)
- Sort by Full Name (Ascending)

Data Explorer Visualization

After running any **Data Explorer Question**, a User can Visualize the set of data located by the Question. This allows the User to view their data in a customized Chart without having to export the Report.

Navigation

After selecting **Show Me** on any functioning Question, the **Visualize** option will display in the top right-hand corner next to the Export and Close buttons.



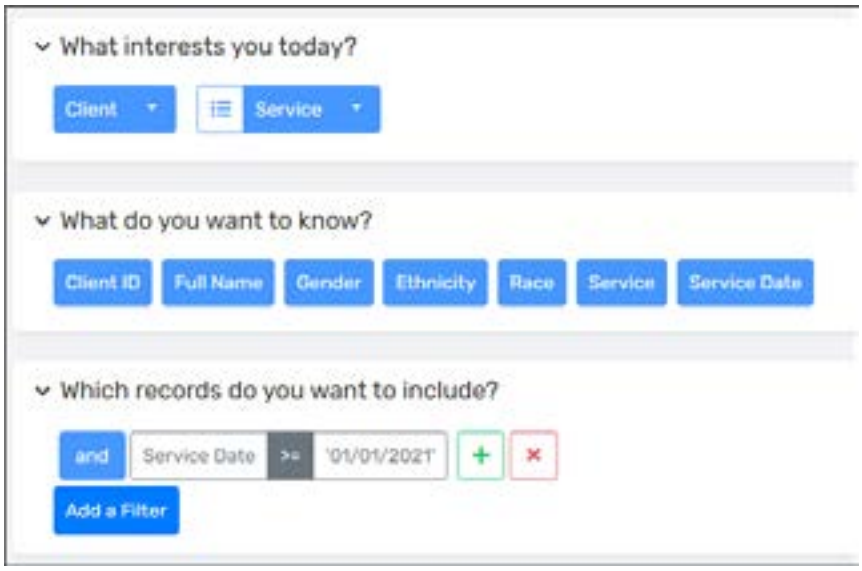
Adding a Visualization

1. After selecting **Show Me** on the necessary Data Explorer Question, select the **Visualize** link.

2. Select a **Series (Y Axis)**, a **Category (X Axis)**, and a **Chart Type**. Multiple Series can be selected if necessary. The displayed Chart will change as the selections are made by the User.

3. If necessary, select a **Category**. The Chart will now display the selected data based on the User's selections.

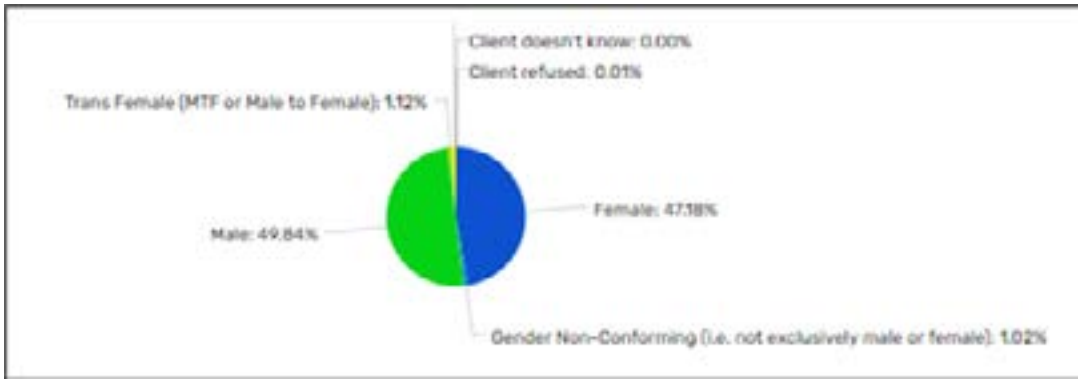
Visualization Examples



The above is an example Data Explorer Question that will have a portion of its data Visualized. After selecting **Show Me** followed by **Visualize**, select the following settings:

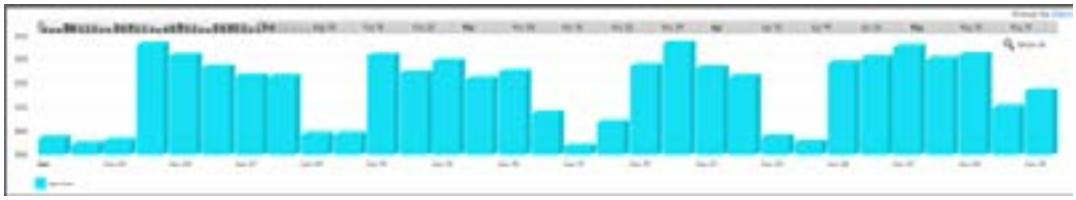
Functionality	Selected Option
Series (Y Axis)	Client ID
Category (X Axis)	Gender
Chart Type	Pie Chart

This will provide you the following VIsualization:



Alternatively, if the same Question's data is Visualized with the below settings, a very different Visualization appears:

Functionality	Selected Option
Series (Y Axis)	Service
Category (X Axis)	Service Date
Chart Type	3D Column Chart



Instead of a Pie Chart displaying the breakdown of the Gender of those Clients that received a Service, this last Visualization displays the number of Services received for every day of the month of January. The time period displayed can be changed using the date range bars at the top of the Visualization.