

# PRINTING FORMS

## Basic Printing Functions

1. To print forms in the system, look for the printing symbol in the right-hand corner of your screen. If you DO NOT see the printing icon, then you cannot print that specific screen.



2. Click on the print symbol, and the printable form page will pop up. Do NOT check the box next to "Break between each page". This page will show up every time you click on the print icon.

**Printable Form**

This page will display the form in a format more suitable for printing. You can choose to either print the data on the form or print a version of the form that blanks all the input fields and leaves a space for manual data entry.

In either case, the actual printing is left to the browser. You can choose whether or not you want to force a page break between each page of the form, but beyond that, the output is totally controlled by the browser. **The output will likely not exactly match what you see here.** If using Internet Explorer 7, please note that the print preview does not function correctly when printing from an inline frame and will improperly display the results. If you print without using print preview, it will print correctly.

Break between each page:

Display as a blank form for manual input

Display the data in a format better suited for printing

3. When you choose "Display as a blank form for manual input" you will be able to print the version of the form that blanks all the input fields and leaves a space for manual data entry.

**Basic Client Information**

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

First Name: \* \_\_\_\_\_

Last Name: \* \_\_\_\_\_

Middle Name: \_\_\_\_\_

Suffix: \_\_\_\_\_

Name Quality: \*  Full name reported  
 Partial, street name, or code name reported  
 Client doesn't know  
 Client refused  
 Data not collected

Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

- When you choose "Display the data in a format better suited for printing" you will be able to print the actual data on the form. You **MUST** print each page separately.

**Basic Client Information**

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

First Name:	* Test
Last Name:	* Alex
Middle Name:	Test
Suffix:	
Name Quality:	* Full name reported
Social Security Number:	235-59-8754

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**Basic Client Demographics**

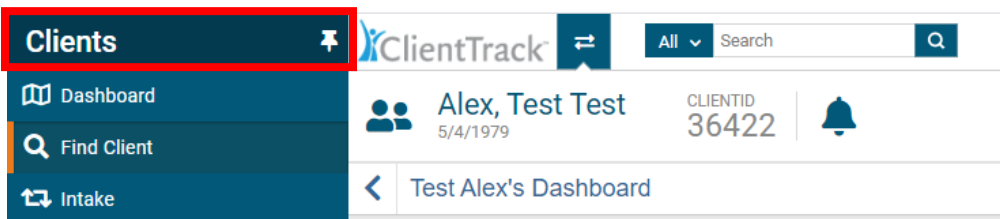
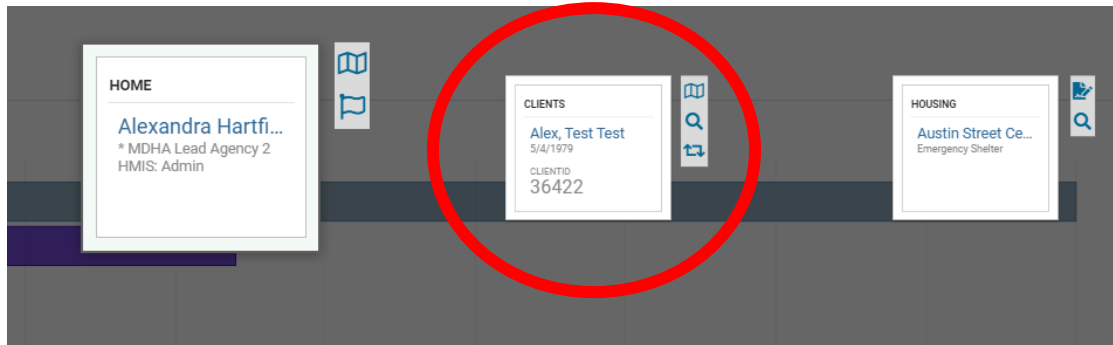
Birth Date:	* 05/04/1979
Client Age:	40
	<input checked="" type="checkbox"/> Full DOB Reported
	<input type="checkbox"/> Approximate or Partial DOB Reported
Date of Birth Quality:	* <input type="checkbox"/> Client doesn't know
	<input type="checkbox"/> Client refused
	<input type="checkbox"/> Data not collected
Ethnicity:	* Hispanic/Latino
Race:	* White
Gender:	* Female
Veteran Status:	* No

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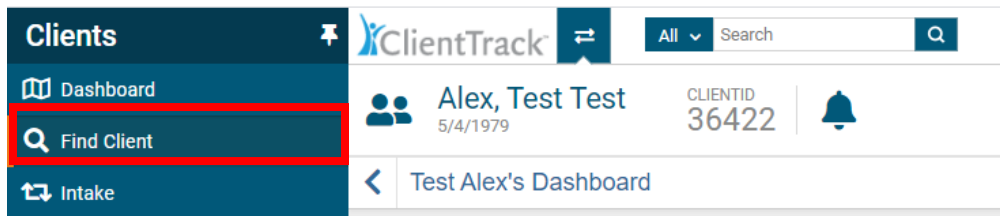
**Contact Information**

## Printing Services

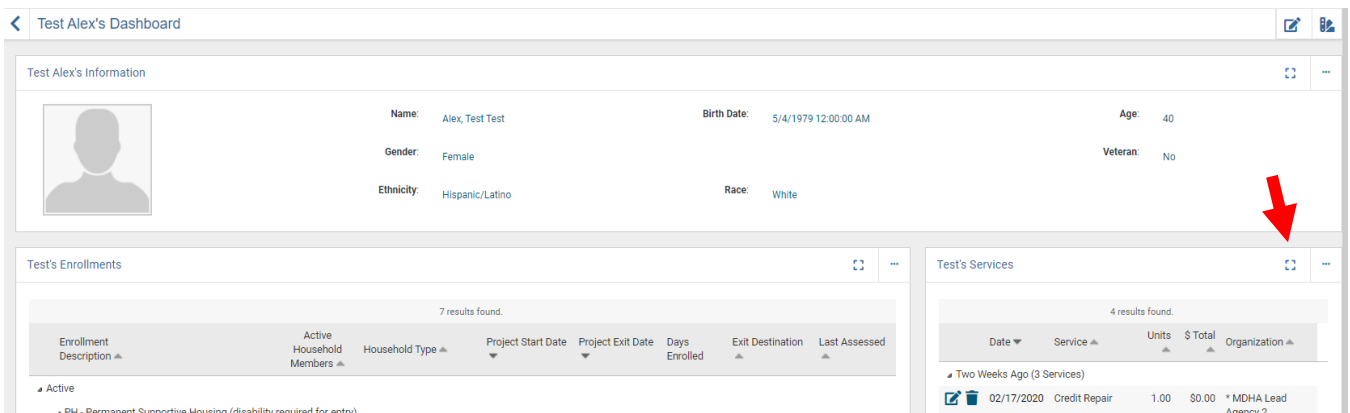
- When printing services, you must be on the "Clients" workspace. Click on the two arrows at the top of your screen, click on clients and then the client dashboard will appear.



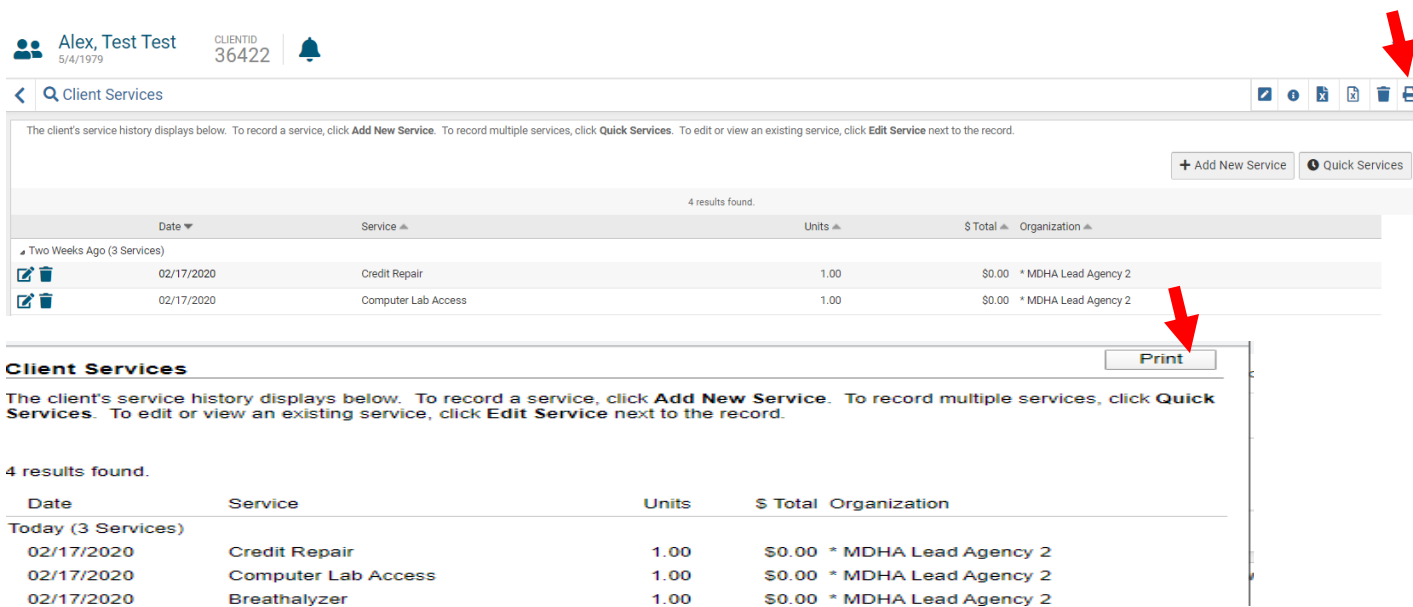
2. Find your client.



3. On your client's dashboard, click on the services box icon next to your client's services.



4. Your client services screen will appear. You can print the complete list of services for your client from this services home screen.







- If you need to print services separately that include the comment section, click on the blue edit service box next to the specific service you need to print.

Client Services

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

4 results found.

Date	Service	Units	\$ Total	Organization
Two Weeks Ago (3 Services)				
 02/17/2020	Credit Repair	1.00	\$0.00	* MDHA Lead Agency 2
 02/17/2020	Computer Lab Access	1.00	\$0.00	* MDHA Lead Agency 2
 02/17/2020	Breathalyzer	1.00	\$0.00	* MDHA Lead Agency 2
Three Weeks Ago (1 Services)				
 02/10/2020	Essential Services	1.00	\$0.00	City House *
		4.00	\$0.00	

- The service screen will appear, and you will click on the print icon in the upper right-hand corner. Print your single service with your comments box.

Service

Enter the information about the service provided to the client below.  
MDH

Family Income:				
Income	Family Income	Family Members	Poverty Level	% of Poverty
\$0.00	\$0.00	1	\$1,040.83	0.00 %

Enrollment: 01/07/2020 - HMIS Training - HUD: HOPWA - PH

Service: Computer Lab Access

Location: New HMIS Support Hub

Date: 02/17/2020

Units Of Measure:  Dollars  Minutes  Count  Hours

Units: 1.00

Unit Value: \$0.00

Total: \$0.00

User Performing the Service: Alexandra Hartfield

Comments: Client used the computer lab today to job search and apply for jobs.

**Service** **Print**

Enter the information about the service provided to the client below.  
MDH

Family Income:				
Income	Family Income	Family Members	Poverty Level	% of Poverty
\$0.00	\$0.00	1	\$1,040.83	0.00 %

Enrollment: 01/07/2020 - HMIS Training - HUD: HOPWA - PH

Service: Computer Lab Access

Location: New HMIS Support Hub

Date: 02/17/2020

Dollars  Minutes  Count  Hours

Units: 1.00

Unit Value: \$0.00

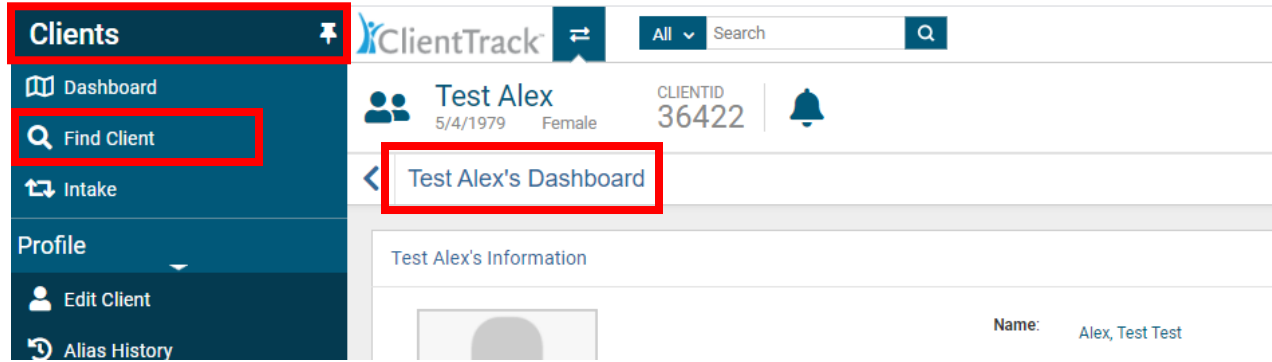
Total: \$0.00

User Performing the Service: Alexandra Hartfield

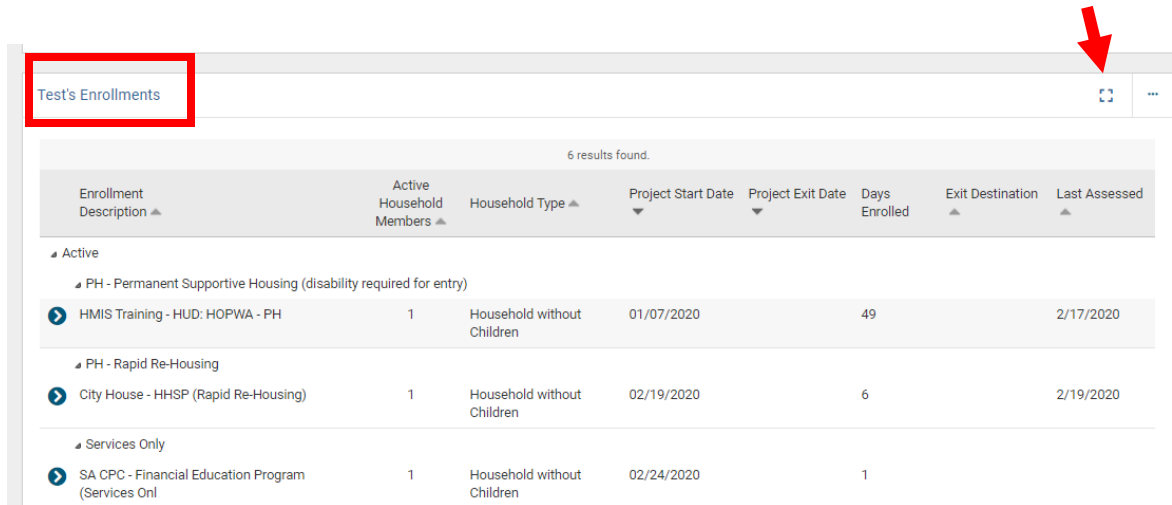
Comments: Client used the computer lab today to job search and apply for jobs.

## Printing Entry and Exit Assessments

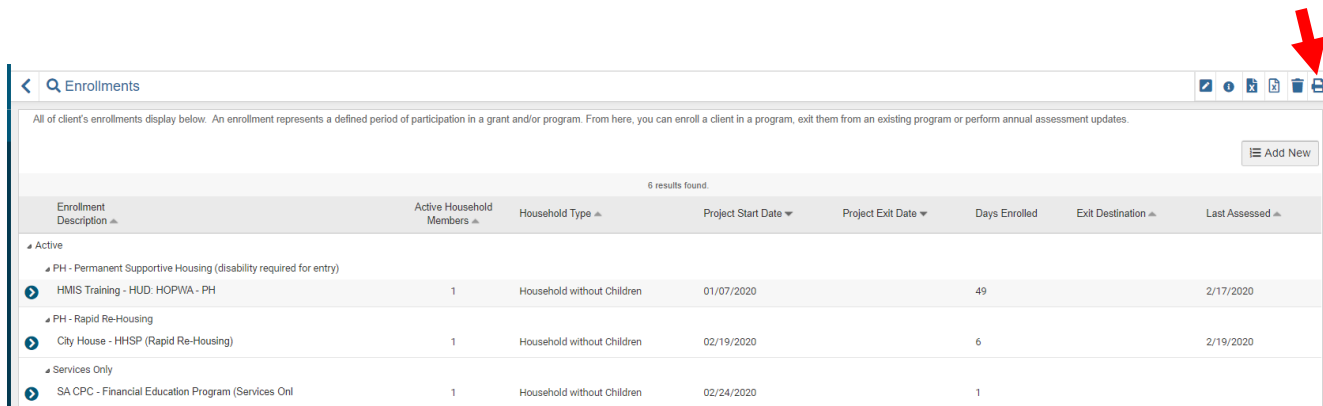
- From your "Clients" workspace, find and choose your client and then the client's dashboard will open.



- To print the list of enrollments for your client, scroll down to your client's enrollments section and click on the enrollment icon box.



- Click on the print icon in the upper right-hand corner of the enrollments screen.





**Enrollments** Print

All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a client in a program, exit them from an existing program or perform annual assessment updates.

6 results found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Project Exit Date	Days Enrolled	Exit Destination	Last Assessed
<b>Active</b>							
PH - Permanent Supportive Housing (disability required for entry)							
HMIS Training - HUD: HOPWA - PH	1	Household without Children	01/07/2020		49		2/17/2020

- To print Entry and Exit Assessments, go to your client's dashboard, scroll down to your client enrollments section and click on the blue action button to the left of your enrollment. Choose "Edit Project Entry Workflow" to print out the Entry Assessment and choose "Edit Exit Workflow" to print out the Exit Assessment. **You MUST print each page separately by clicking on the print icon in the upper right-hand corner of each screen.** As you move through the workflow, you can select "no changes" or "save and close" on each screen.


Alex, Test Test CLIENTID 36422 🔔

5/4/1979

< Test Alex's Dashboard

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Test Alex's Information



**Name:** Alex, Test Test **Birth Date:** 5/4/1979 12:00:00 AM

**Gender:** Female

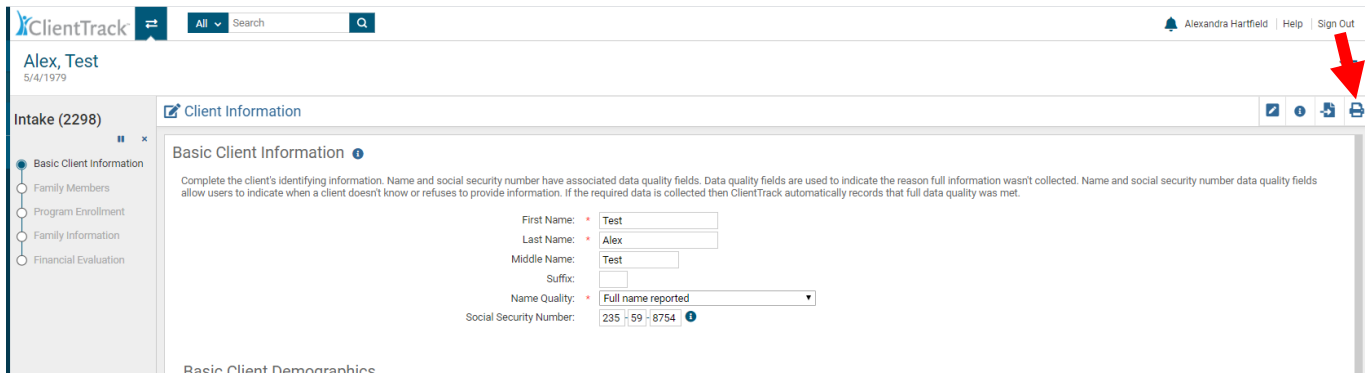
**Ethnicity:** Hispanic/Latino **Race:** White

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Test's Enrollments 🔍 ...

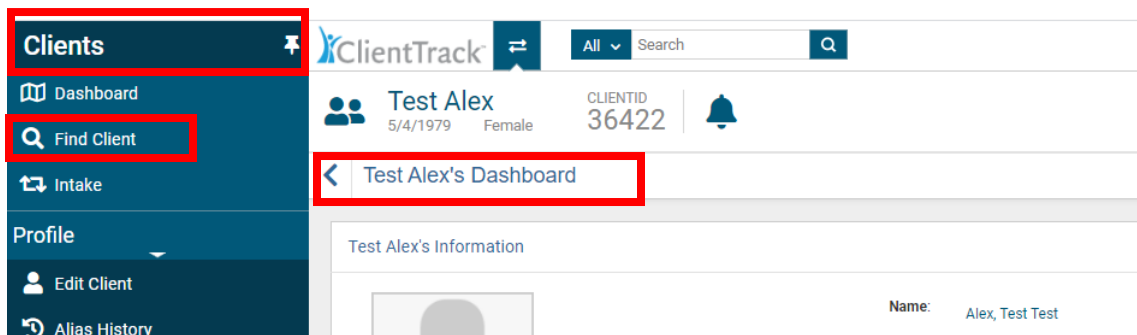
6 results found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Project Exit Date	Days Enrolled	Exit Destination	Last Assessed
<b>Active</b>							
<b>Exited</b>							
PH - Permanent Supportive Housing (disability required for entry)							
<input checked="" type="checkbox"/> <div style="border: 1px solid red; padding: 2px;"> <ul style="list-style-type: none"> <li>🏠 Add Household Member</li> <li>🔍 Associated Assessments</li> <li>🕒 Missed Annual/Update Assessment</li> <li>✍ Edit Enrollment</li> <li style="border: 1px solid red; padding: 2px;">📄 Edit Project Entry Workflow</li> <li style="border: 1px solid red; padding: 2px;">📄 Edit Exit Workflow</li> <li>➔ Link Assessments</li> <li>📄 Review Entry Assessments</li> <li>📄 Review Exit Assessments</li> </ul> </div>	0	Household without Children	01/07/2020	02/25/2020	49	Place not meant for habit...	2/25/2020

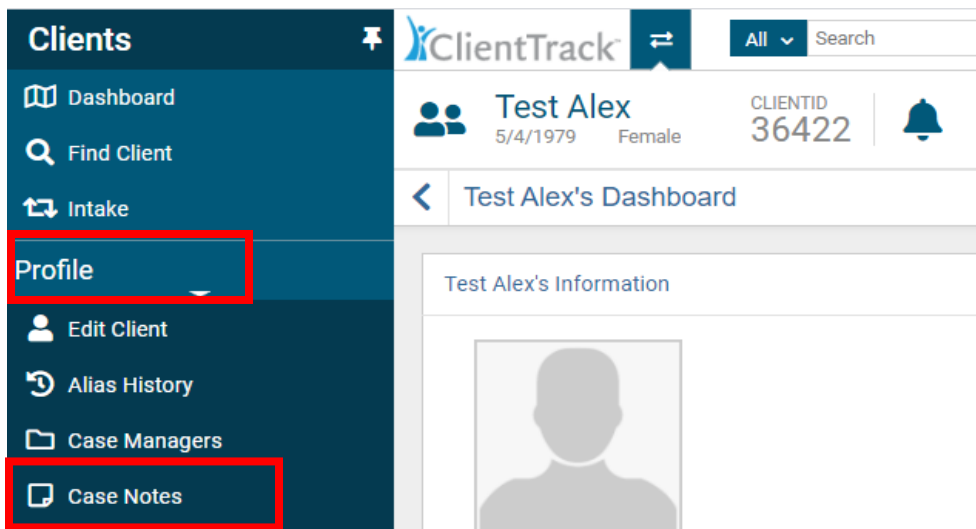


## Printing Case Notes

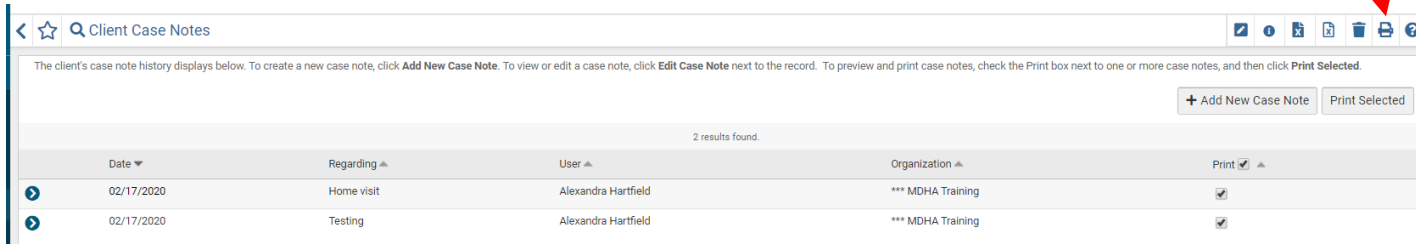
1. From your "Clients" workspace, find and choose your client and then the client's dashboard will open.



2. On the left-hand side of the client's dashboard, is the Menu Bar. Click on Profile and then Case Notes.



- Your clients case notes screen will appear. You can print the case note history without the case notes by clicking on the print icon in the upper right-hand corner.



- You can print the full case notes by checking the box next to Print. Checking this box will allow you to "print all" case notes. If you need to print only certain case notes, only put a check in the boxes next to each case note you want to print. Click on Print Selected to print the notes.

