

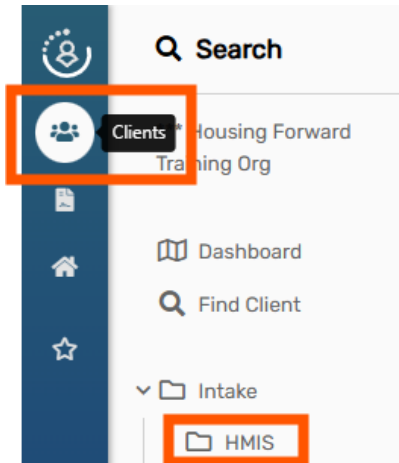
Create an Entry/Intake Assessment

Steps

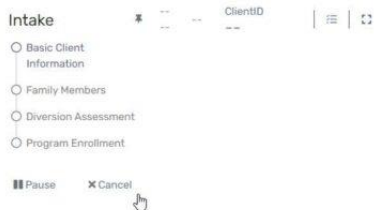
Log in to ClientTrack and navigate to your Clients Workspace.

To record an Entry Assessment for a client, be sure you are on the Clients Workspace.

Click the Intake folder in the top left corner and select HMIS. This will start a workflow.



In this case, select **Add a new client**



Add or Edit
Do you want to add a new client or use the selected client?

A form with three options for adding or editing a client. The first option, '+ Add a new client', is highlighted with a red rectangle. The other two options are 'Use the current client' and 'Select another client'.

Enter ONLY the first three letters of the client's first name and the first three letters of the client's last name. This will search the system to see if the client has an existing HMIS record. Click Next in the bottom right corner.

Intake ClientID 123

Client Information

Search Existing Clients

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

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

First Name:

Last Name:

Social Security Number:

Birth Date: MM/DD/YYYY

Next

The system will search to see if the client has an existing record. Be sure to select the existing record if the client returns in the search results. Doing so will add the enrollment to the existing record. If the client does not have an existing record, click Next to create a new record.

Search

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name:

Last Name:

Middle Name:

Full Name (Last, First):

Social Security Number:

Birth Date:

Scan Client ID:

Search

No records found.

First Name	Last Name	Middle Name	SSN	Client ID	Birth Date

Cancel

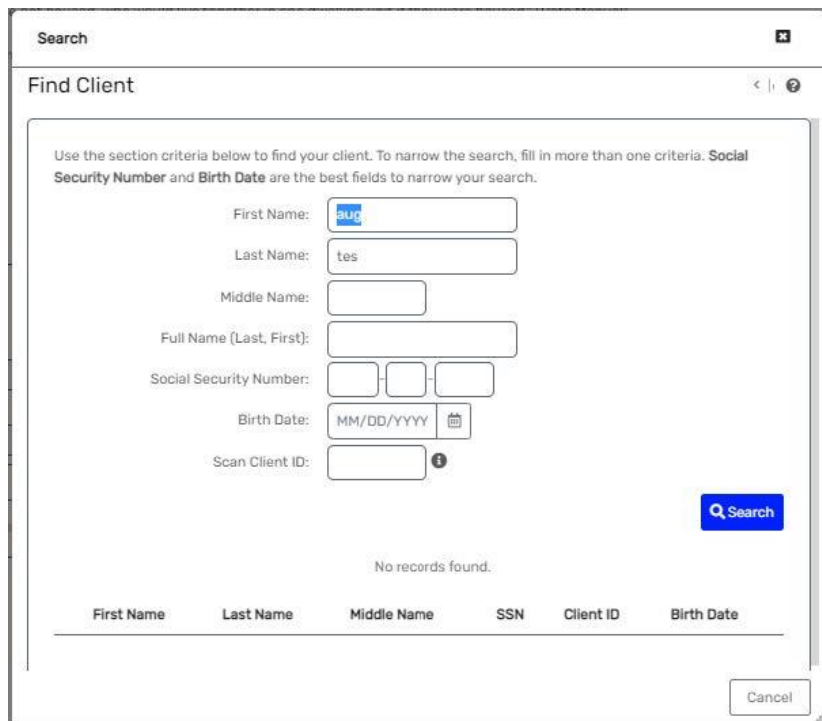
Continue to fill out the Basic Client Information screen and click Finish when done.

Family Members – This is the screen where all individuals within the family will be entered.

Starting with the first blank row, record **ONLY** the first three letters of the client's first name and the first three letters of the client's last name. Use the tab key or the magnifying glass. A Find Client screen will open.



Click the Search button to see if the client has an existing record. If so, be sure to click on that record to add that client to the enrollment workflow. If the client does not have an existing record, simply close the box.



Click Save & Close.

Select the Project for which the client will be enrolled in from the dropdown box.

Intake

Book Check Information

Apply Payment

Manage Enrollment

Program Enrollment

Users

Current

MUD Program Enrollment

Select the program you are enrolling the student into.
Click the link and display a list of interest in this category family.
Please select all the categories you are enrolling.

The Project Start Date is:

- 1. The Student Enrollment period is 1 to 10 days of that specified with the client.
- 2. An Emergency Admission is a one night stay that is not subject to the criteria for the admission criteria period for staying in youth. Nightly supervision is required, which will be a night stay that is not subject to the criteria for staying in youth. Nightly supervision is required, which will be a night stay that is not subject to the criteria for staying in youth.
- 3. The Admission or Transferal Hearing is a meeting with the client, parent, and the admission period in April, May, or June.
- 4. The Admission or Transferal Hearing is a meeting with the client, parent, and the admission period in April, May, or June.
- 5. The Admission or Transferal Hearing is a meeting with the client, parent, and the admission period in April, May, or June.
- 6. The Admission or Transferal Hearing is a meeting with the client, parent, and the admission period in April, May, or June.
- 7. The Admission or Transferal Hearing is a meeting with the client, parent, and the admission period in April, May, or June.
- 8. The Admission or Transferal Hearing is a meeting with the client, parent, and the admission period in April, May, or June.
- 9. The Admission or Transferal Hearing is a meeting with the client, parent, and the admission period in April, May, or June.
- 10. The Admission or Transferal Hearing is a meeting with the client, parent, and the admission period in April, May, or June.

Project #

Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance were housed)."

☐	Name	Gender	Age	Project Start Date	Exit Date
☒	test, test	Female	27	08/09/2022 📅	MM/DD/YYYY
☒	tes, aug	Male	9	08/09/2022 📅	MM/DD/YYYY

Click Save.

Universal Data Assessment

Record all information for the client. The Assessment date should be equal to the project start date.

Click Save.

Intake

Basic Client Information

Family Members

Diversion Assessment

Program Enrollment

Test Test

New Assessment

Aug Test

Pause

Cancel

ClientID

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.977 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.977 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.977. 3.977 may not always show as expected because of changed setup data or missing required data links.

Default Client's Last Assessment

Assessment Date: 06/09/2022

Age at Assessment: 27

Assessment Type: Entry

Assessor: Haley Walton

Program: CCC CMB - Coordinated Entry

Disabling Condition: --SELECT--

Client Location

Barriers

Record all information for the client. The Identified Date should be equal to the project start date.

Save & Close

Intake

Basic Client Information

Family Members

Diversion Assessment

Program Enrollment

Test Test

New Assessment

Barriers / Special Needs

Domestic Violence

Intake

Aug Test

Pause

Cancel

ClientID

Barriers

Use this form to identify whether a client has each individual barrier or not. The Client's last assessment will be displayed as a default. You may, optionally, click the Screen button to view the client's last assessment.

Identified Date: 06/09/2022

Screen: YES/NO Barriers

Disabling Condition: No

Barrier ID	Barrier	Help	Barrier Present?
☐	Mental Illness Disorder		--SELECT--
☐	Chronic Health Condition		--SELECT--
☐	Developmental Disability		--SELECT--
☐	Drug Use Disorder		--SELECT--
☐	HIV/AIDS		--SELECT--
☐	Mental Health		--SELECT--
☐	Physical Disability		--SELECT--

Income and Sources, Non-Cash Benefits

Record all required information for the client. The Assessment date should be equal to the project start date.

Save & Close

The screenshot shows the 'Intake' system interface for the 'Income and Sources, Non-Cash Benefits' form. On the left is a sidebar with a navigation menu including 'Basic Client Information', 'Family Members', 'Program Enrollment', 'Home Visit', 'Risk Assessment', 'Barriers / Special Needs', 'Domestic Violence', 'Income', and 'Payroll'. The main content area is titled 'Income and Sources, Non-Cash Benefits' and contains instructions: 'Indicate below the client's sources of monthly income, non-cash benefits, and expenses.' and 'The following instructions are quoted from the HMIS Data Manual:'. It lists three bullet points: 1) 'When a client has income, and does not know the exact amount, a "Yes" response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.' 2) 'Income received by an individual on behalf of a minor child should be recorded as part of household income under the head of household, unless the Federal Register in the HMIS Program Specific Manual instructs otherwise. Do not choose to collect this information for all household members including minor children, as long as this does not interfere with accurate reporting per funding requirements. If asked to collect data through this system the source of income they receive.' 3) 'Income data should be recorded only for sources of income that are current as of the information date (we have not been specifically terminated). As an example, if a client's employment has been terminated further examples: If a client's most recent paycheck was 2 weeks ago from a job in which the client was working full time for \$10.00/hour, but the client is currently working 20 hours per week for \$10.00 per hour.' Below the instructions are four dropdown menus: 'Assessment Date' (set to 05/01/2020), 'Income From Any Source' (set to 150.00), 'Non-Cash Benefits From Any Source' (set to 150.00), and 'Expenses' (set to 150.00). A 'Default Last Assessment' button is located above the 'Assessment Date' dropdown.

Record all required assessment for each family member. You will come to the end of the workflow. Click Finish.

