Spokane CMIS
New ClientTrack Training

eccovia®

2022

Welcome to Our Training!

Housekeeping

- Please keep your microphones on mute to reduce background noise
- Please type questions in the chat and we will answer them after concluding the PowerPoint Slides and again after our live demonstration
- The information we are covering today can be further explored in the ClientTrack User Guide (the file is attached to this webinar and will be included with the recording of the training along with these slides)

Today’s Agenda

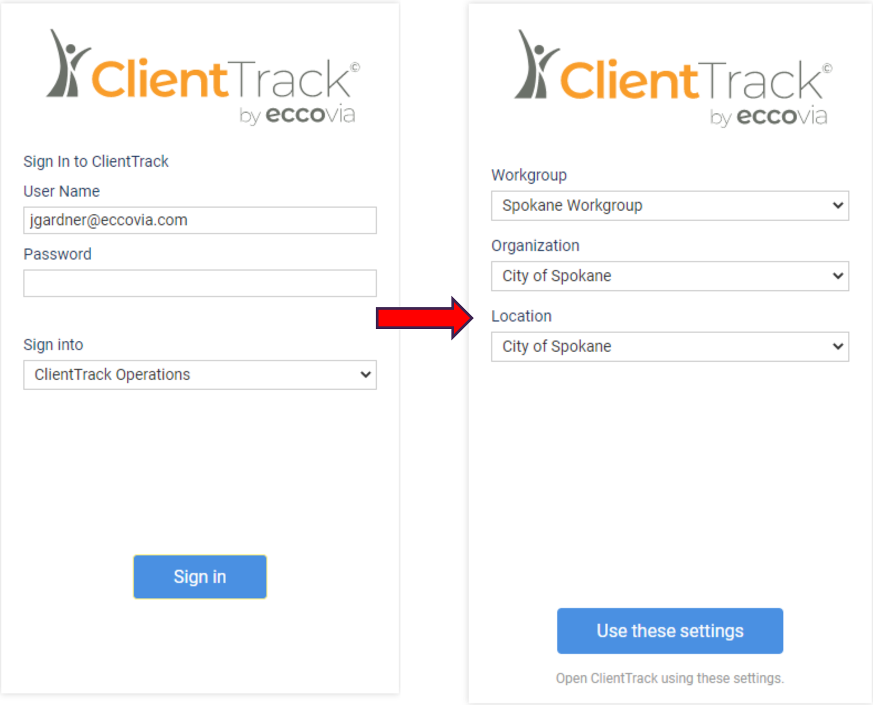
- **Welcome & Introductions**
- **Important Notes Before We Begin**
- **Overview of Changes**
  - Login Screen
  - Account Settings
  - Overview When First Logging Into ClientTrack
  - Menu Groups and Menu Options
  - Workspaces
    - Home
    - Client
    - Housing
    - Support
    - Provider
    - Reports
    - Favorites
  - Search Features in ClientTrack
  - Getting Help in ClientTrack
  - Workflow Process
  - Family Members
  - Action Buttons
- **Question Break 1**
- **Demonstration of Functionality in the Spokane Training Environment**
- **Final Questions and Answers**

Important Notes!

- The upgrade of ClientTrack is just an interface change
- Data collection and data entry requirements HAVE NOT changed
- If you ever can't find something in New ClientTrack, try the global search tool (we will cover this today)
- The biggest changes are that we've done away with the "Workspace Carousel" and with "Fly Out" Menu Options

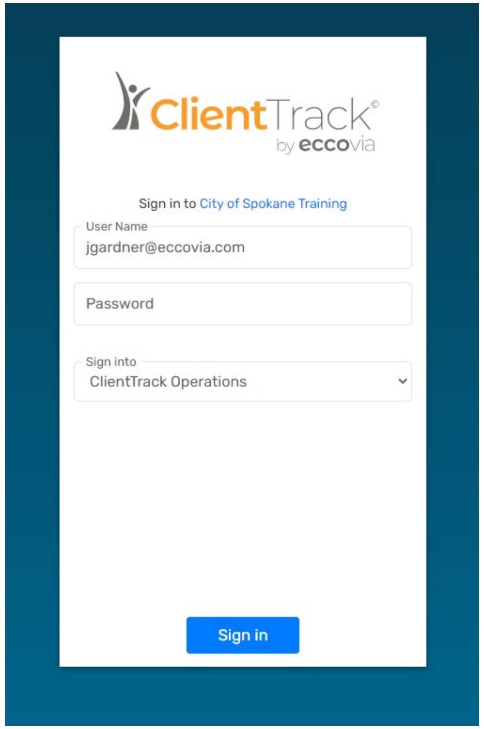
Login Screen

ClientTrack 19



Logging into ClientTrack in version 19 requires confirmation of Workgroup and Organization settings

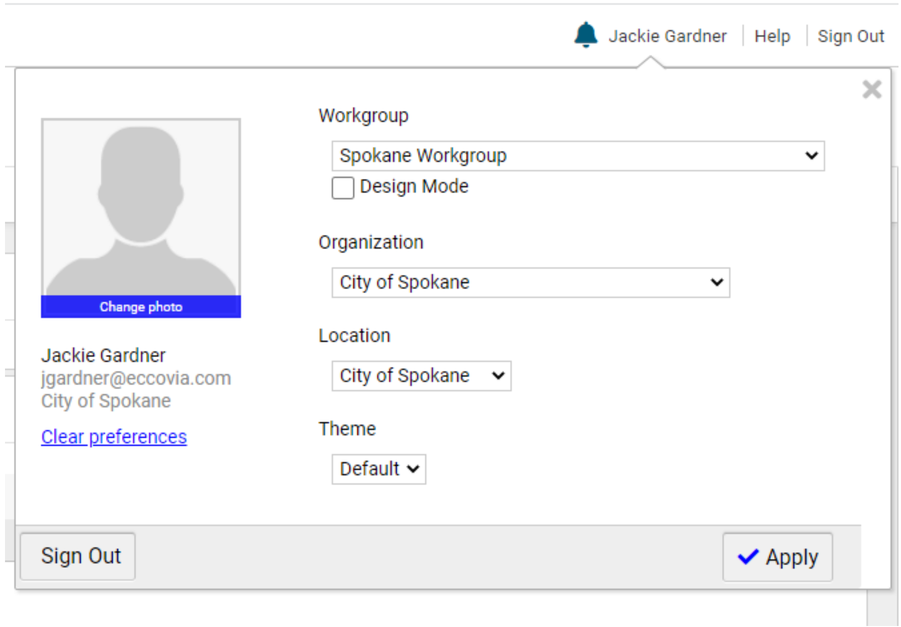
New ClientTrack



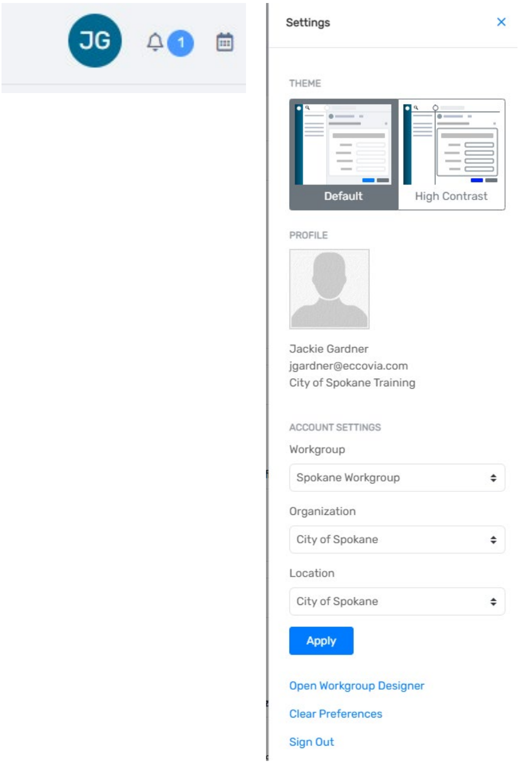
Logging into New ClientTrack takes you directly into the system using either your default Workgroup and Organization, or the last Workgroup and Organization you used when last logged in

Account Settings

ClientTrack 19



New ClientTrack

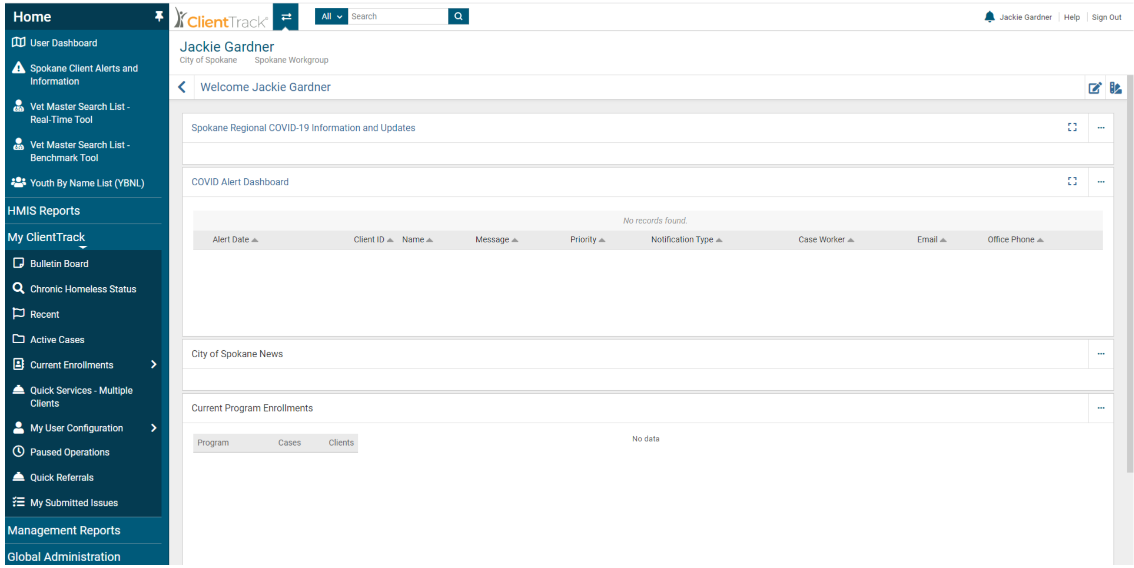


Your account settings are now accessed by clicking the circle containing your initials. In New ClientTrack you can chose between the default layout and a high contrast layout. There is currently no “Dark Mode” available in this version.

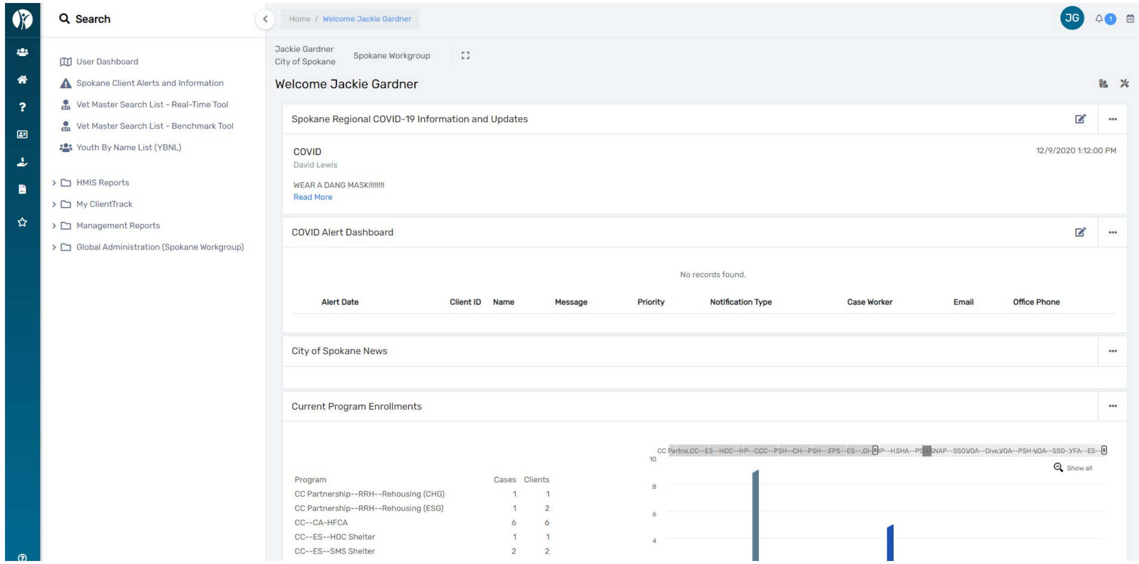
Overview Once Logged In

When you first log into New ClientTrack, take a moment to hover over the icons on the left and click around the menu groups and options!

ClientTrack 19

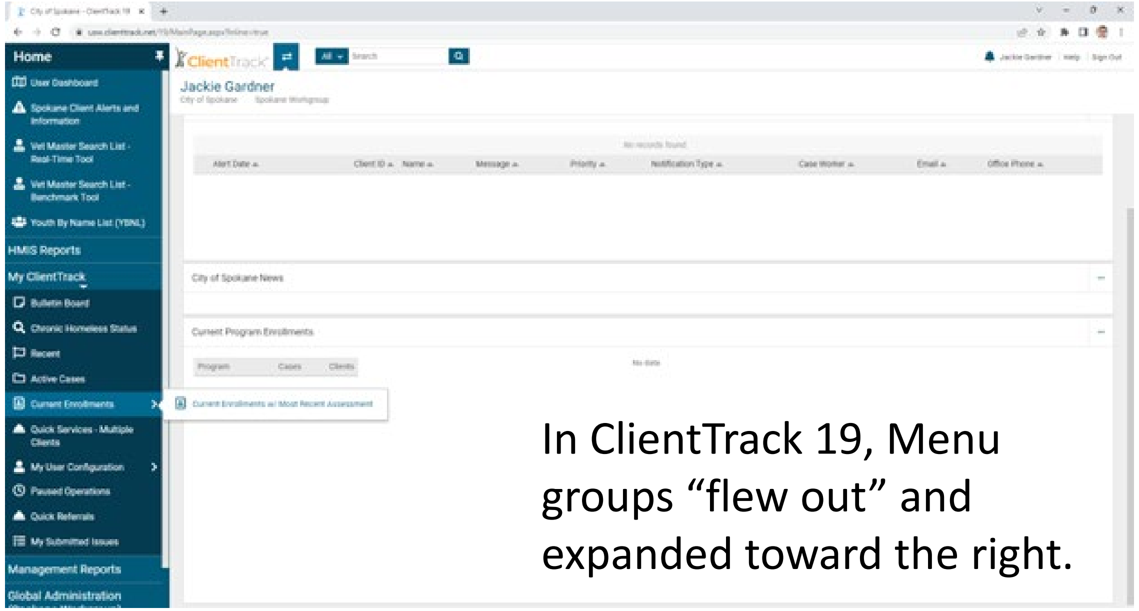


New ClientTrack



Menu Groups and Menu Options

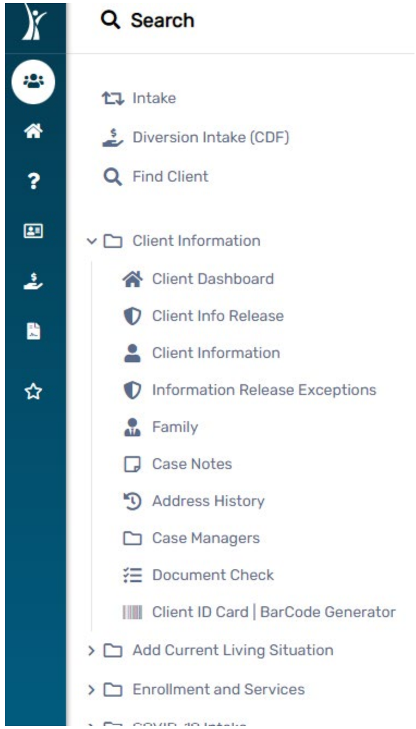
ClientTrack 19



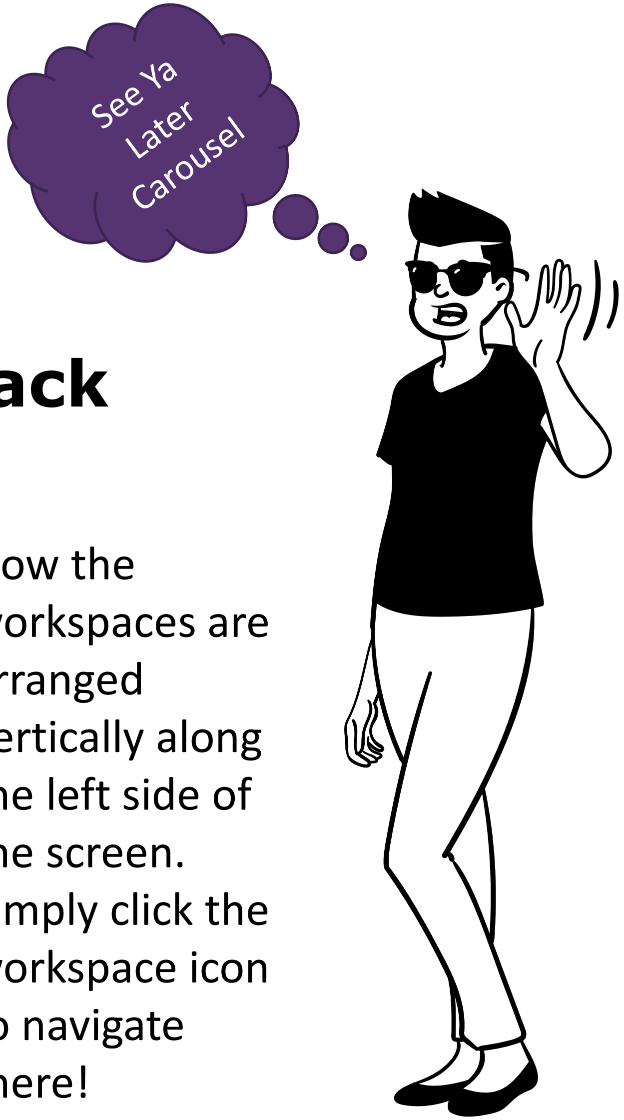
In ClientTrack 19, Menu groups “flew out” and expanded toward the right.

New ClientTrack

In New ClientTrack, menus open and expand
D
O
W
N
the page!

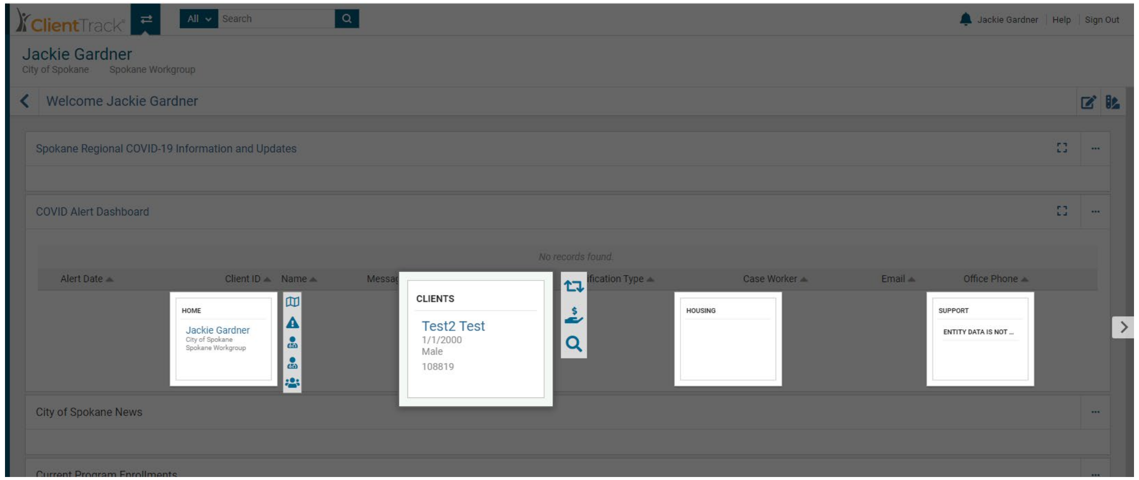


Workspaces



ClientTrack 19

Changing workspaces used to mean clicking the Carousel Button to scroll through them.



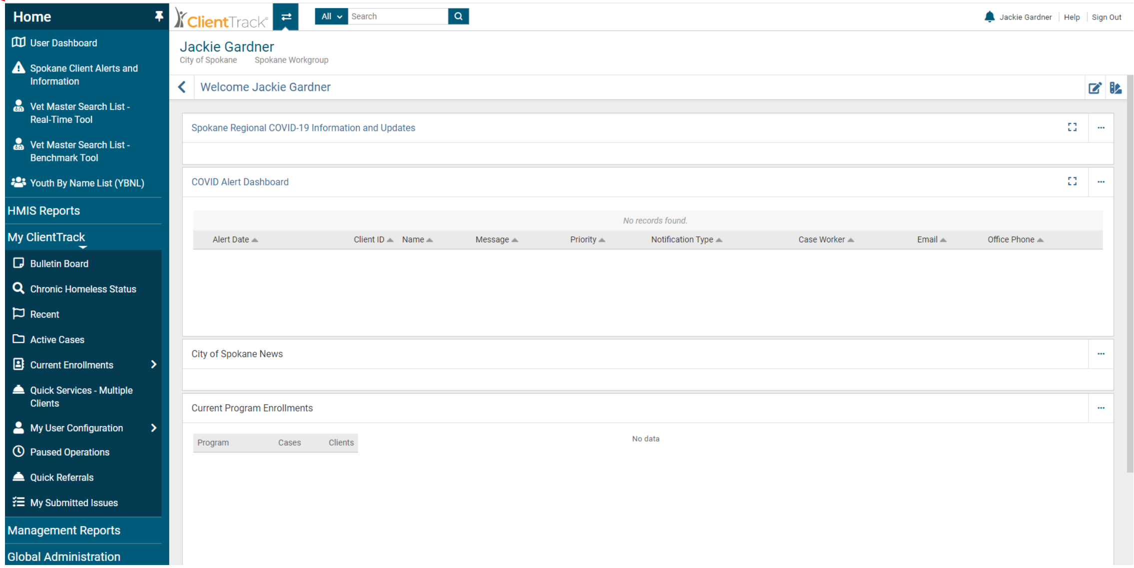
New ClientTrack

Now the workspaces are arranged vertically along the left side of the screen. Simply click the workspace icon to navigate there!

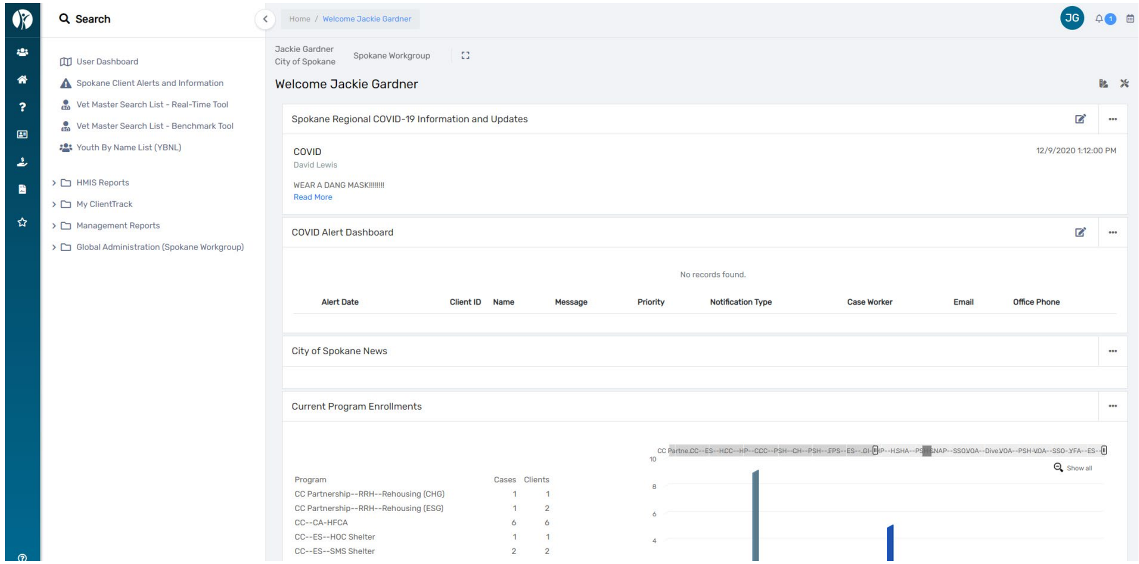
Home Workspace

The Home Workspace provides the same menu groups and menu options. To access the Home Workspace in New ClientTrack, simply click the “Skippy” Icon at the very top of the workspace list.

ClientTrack 19



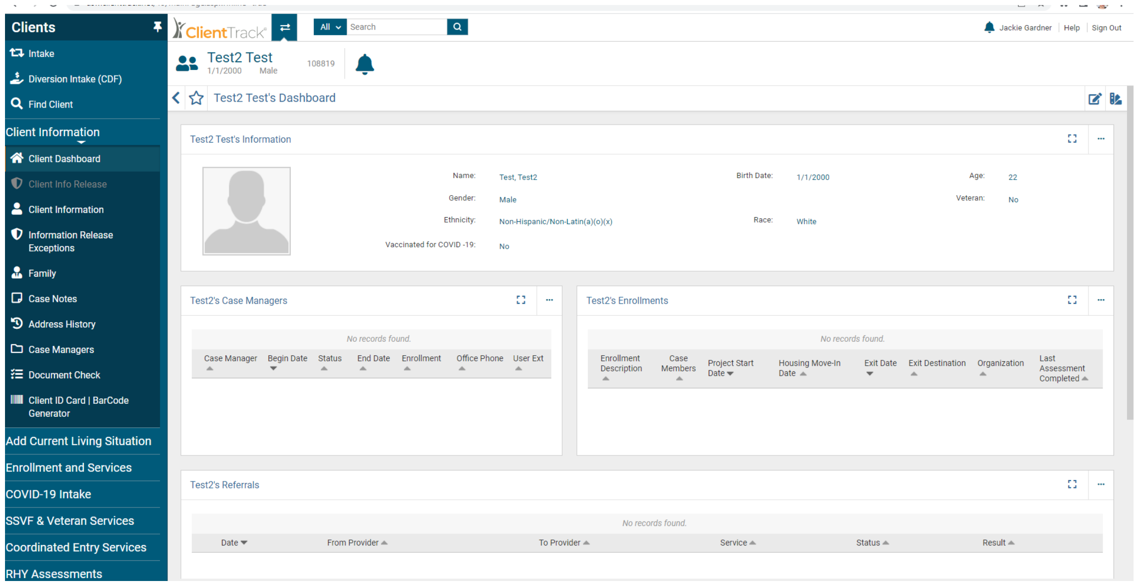
New ClientTrack



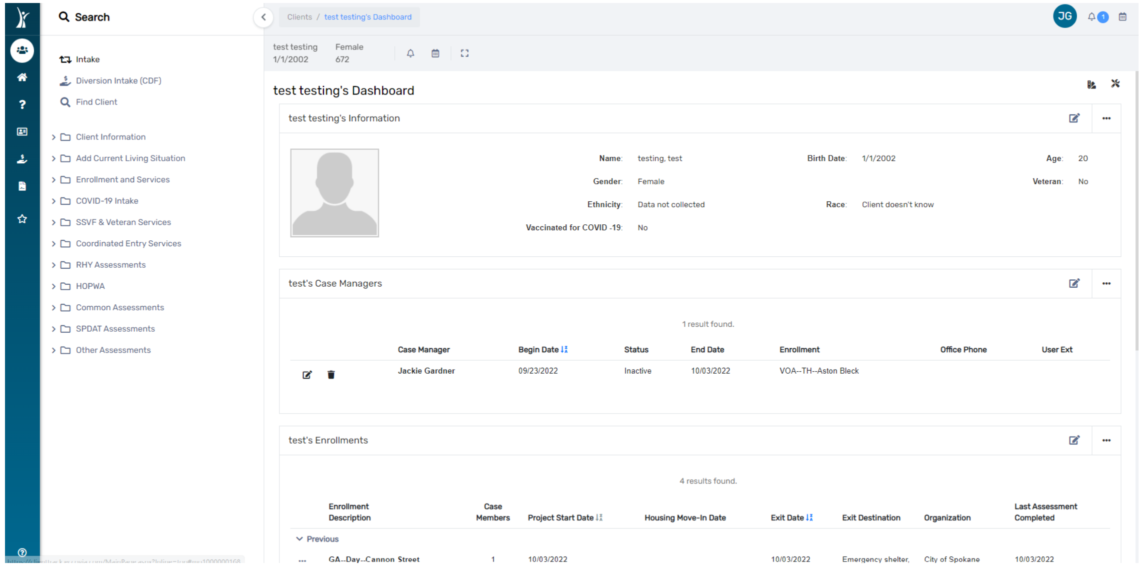
Client Workspace

The Menu Groups and Menu Options in New ClientTrack provide the same functionality. Viewing detailed information about your clients, including assessments, enrollments, case notes, etc. are all accessible in the same places, though the interface is new.

ClientTrack 19



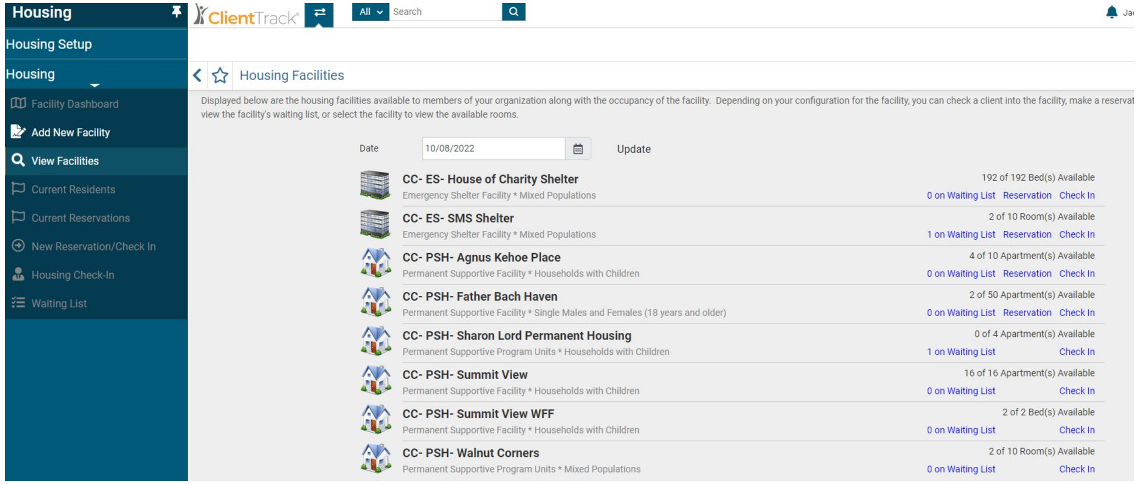
New ClientTrack



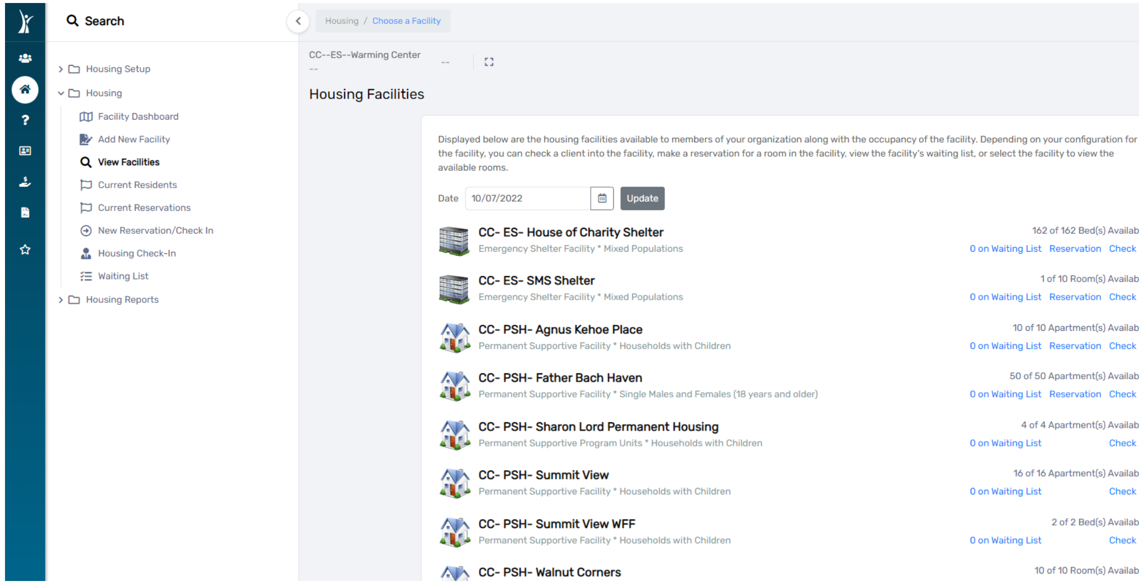
Housing Workspace

All of the functionality you've come to expect from the Housing Workspace is in New ClientTrack. The processes work the same!

ClientTrack 19



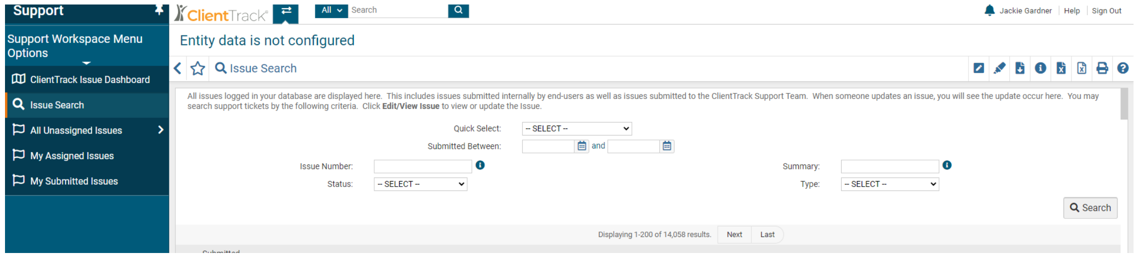
New ClientTrack



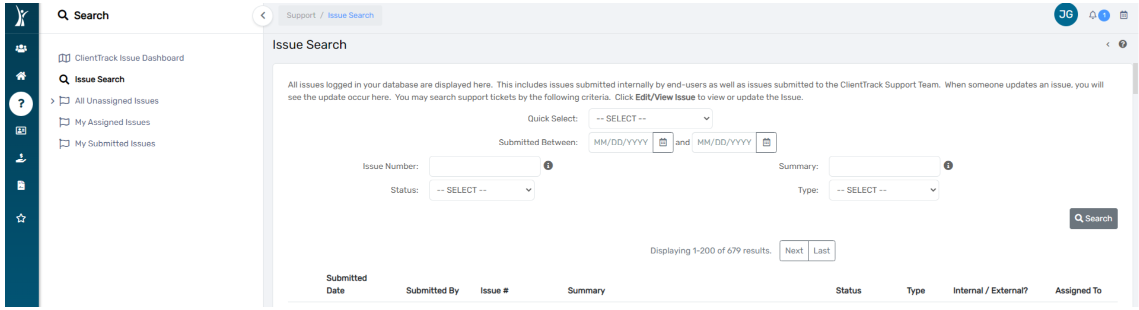
Support Workspace

To view the status of your support tickets, simply click on Issue Search in your Support Workspace or choose My Submitted Issues.

ClientTrack 19



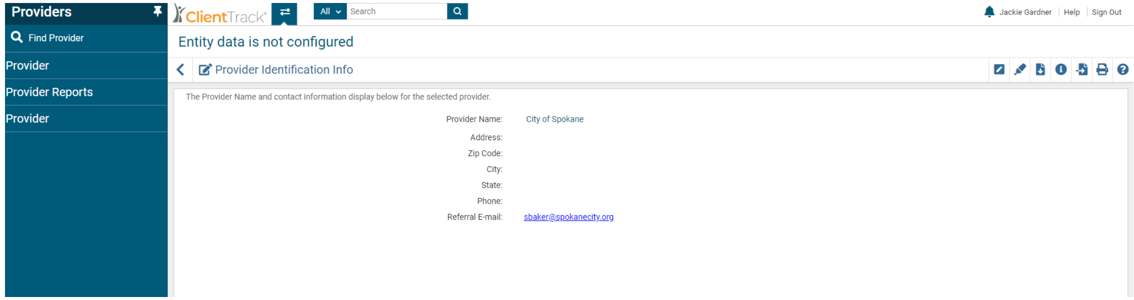
New ClientTrack



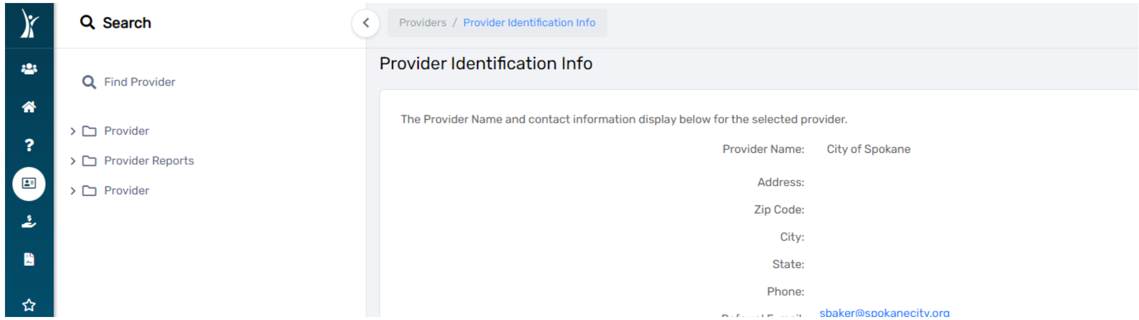
Provider Workspace

Referrals to and from Providers in your system work the same way.

ClientTrack 19



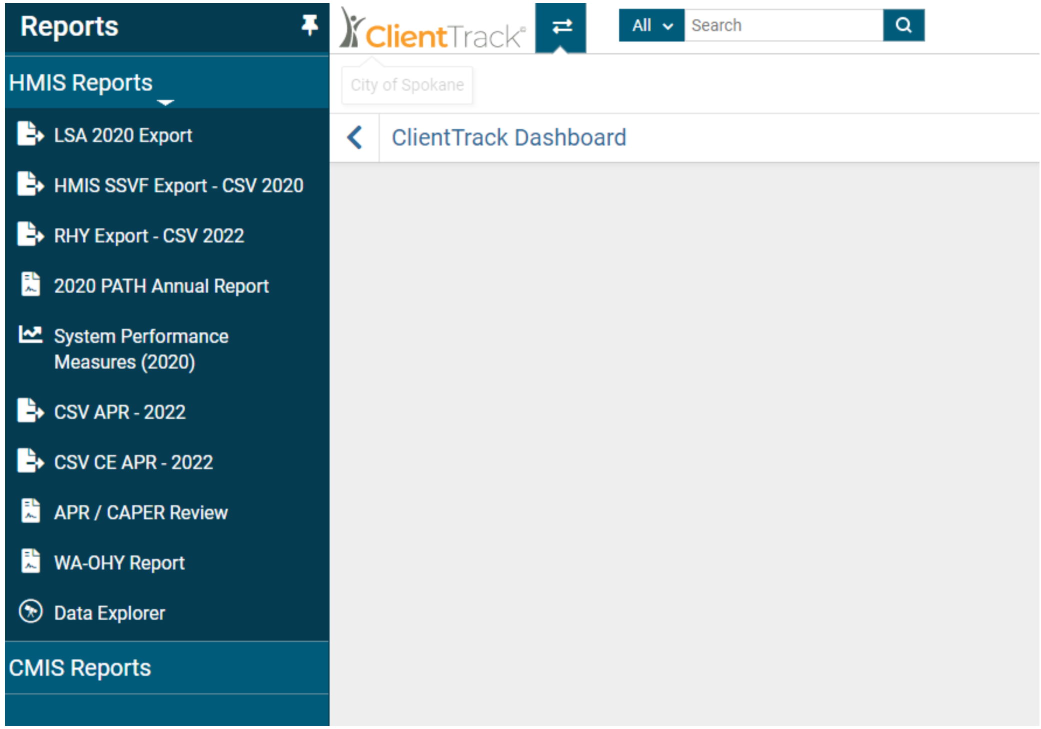
New ClientTrack



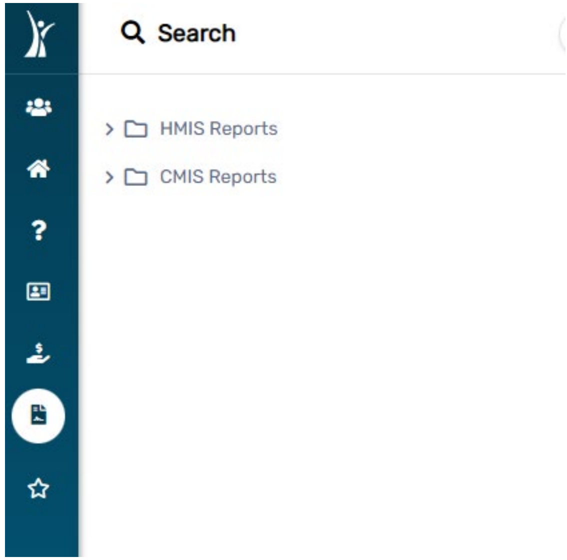
Reports Workspace

Reports in New ClientTrack will require the same type of inputs, like date ranges, organization, program, etc. The processes to generate reports and CSV Exports remain the same.

ClientTrack 19



New ClientTrack



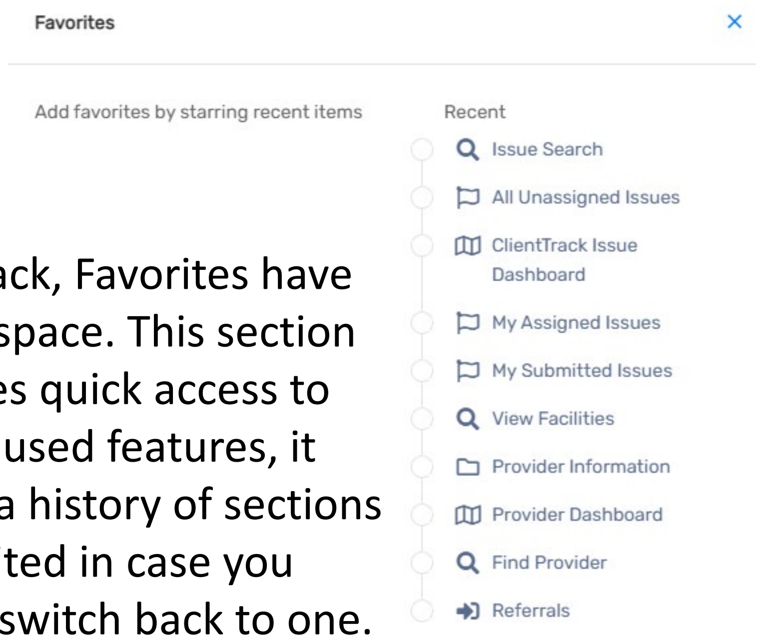
Favorites in ClientTrack

Clicking an available Star Icon in ClientTrack creates an easily accessible "favorite" to help you streamline your work in the system. New ClientTrack handles favorites a little differently than version 19.

ClientTrack 19

In ClientTrack 19, adding a favorite created an extra folder in your workspace.

New ClientTrack



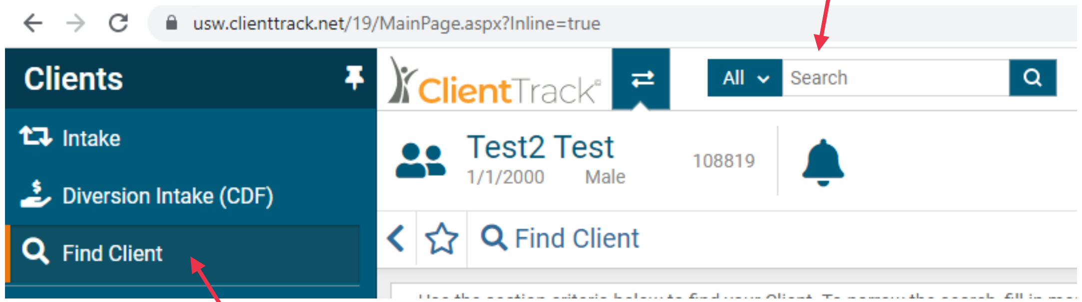
In New ClientTrack, Favorites have their own Workspace. This section not only provides quick access to your frequently used features, it also shows you a history of sections you recently visited in case you need to quickly switch back to one.

Search Features in ClientTrack

There are still 2 ways to Search in ClientTrack. The Global Search bar allows you to search for both clients in the system, as well as sections of the software. The Find Client search will allow you to only search for clients in the system.

ClientTrack 19

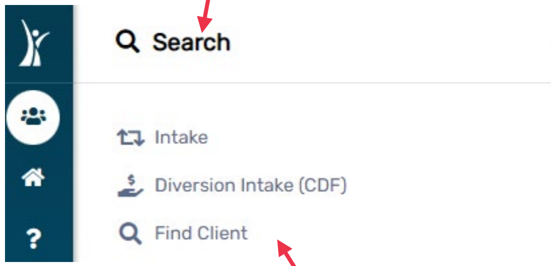
Global Search



Client Search

New ClientTrack

Global Search

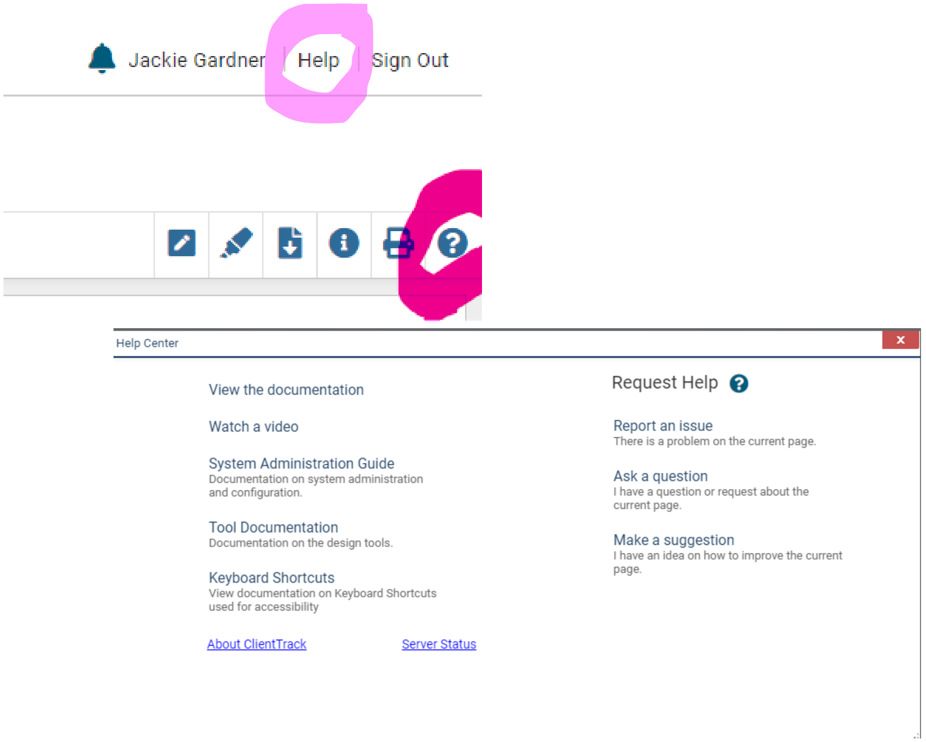


Client Search

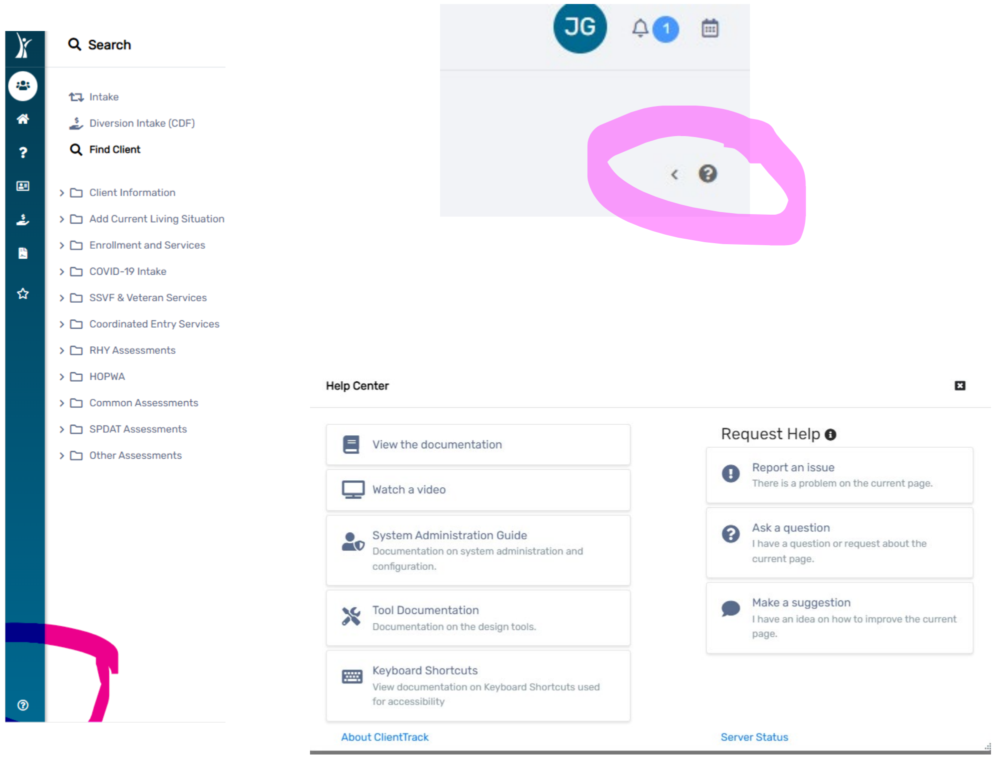
Getting Help in ClientTrack

Locating the Help features in New ClientTrack might be slightly more difficult. The "Help" menu at the top right of the screen is no longer there. To access help, you simply need to click the tiny question mark found either at the top right of the form, or the bottom left of the screen. As a reminder, when encountering an issue in the system that needs support, always be sure you're on the screen where the problem is occurring. It makes troubleshooting much easier.

ClientTrack 19



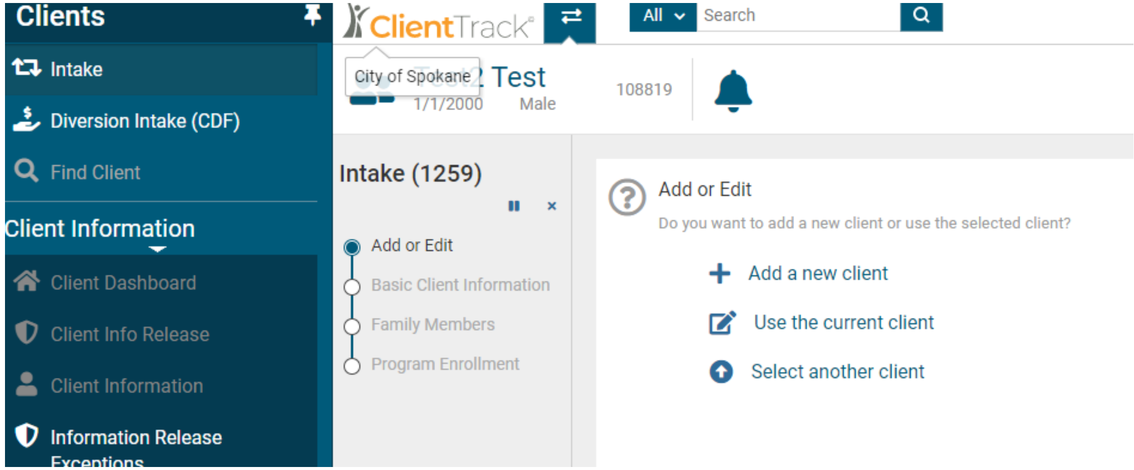
New ClientTrack



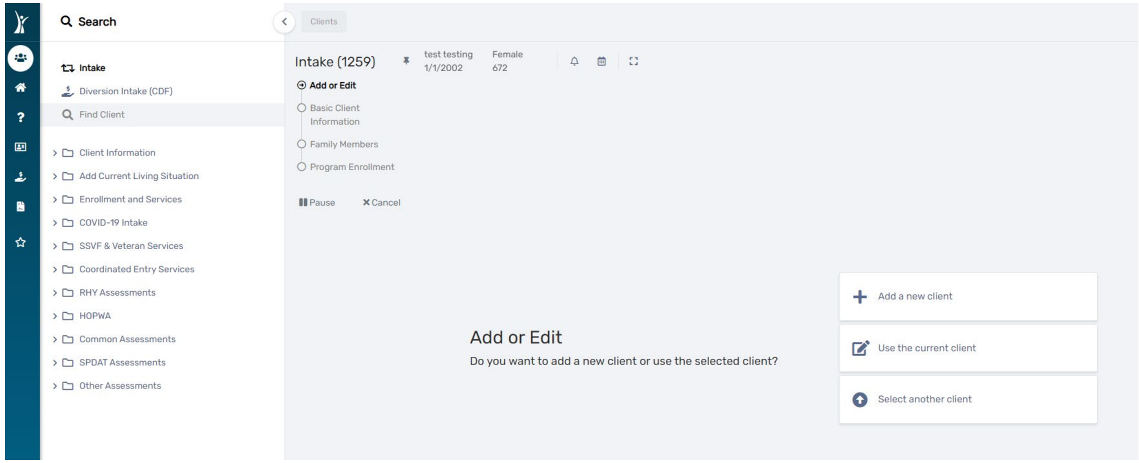
Intake Workflows

Intake workflows in New ClientTrack still collect the same information in the same way. One new difference is that the “pause” and “cancel” workflow options are now spelled out as opposed to just being icons.

ClientTrack 19



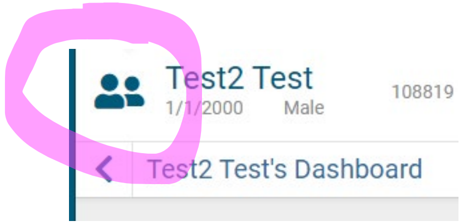
New ClientTrack

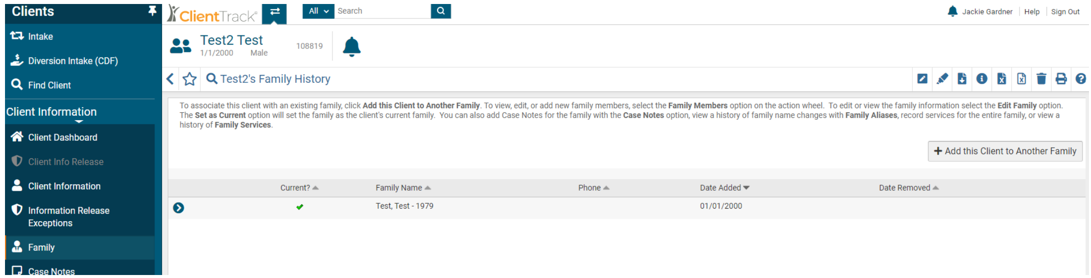


Family Members

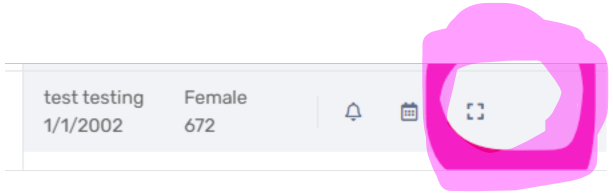
The Icon for viewing family members in New ClientTrack has changed to an “Expand Button.” This button replaces the “people” icon from version 19. This will likely take some getting used to! The alternate method of viewing family member information can still be found in the Client Workspace, under the Client Information Menu Group, and then the “Family” menu option.

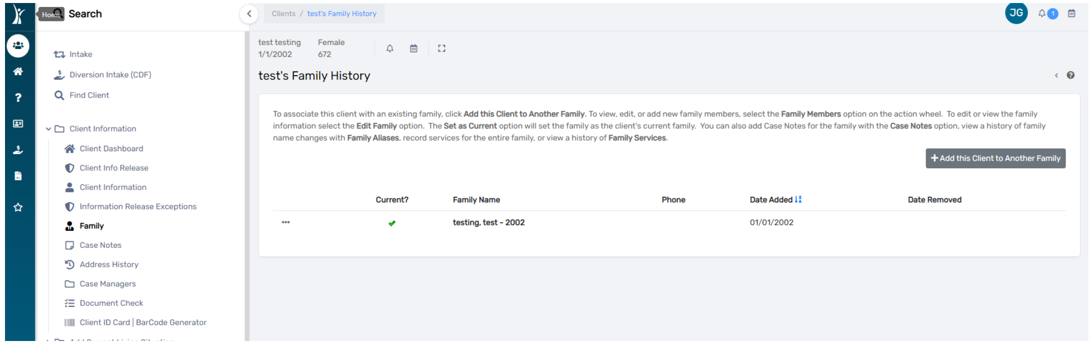
ClientTrack 19





New ClientTrack

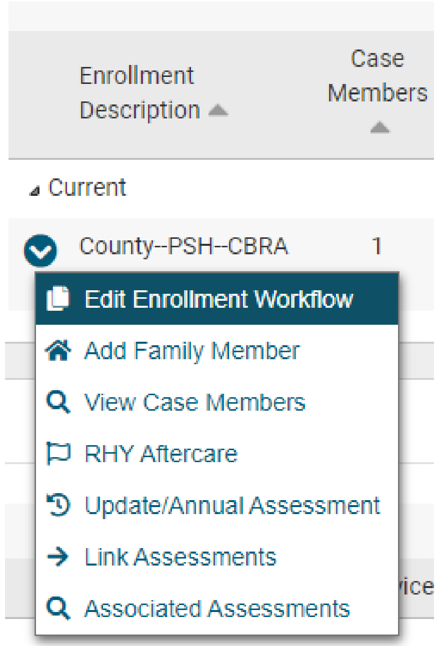




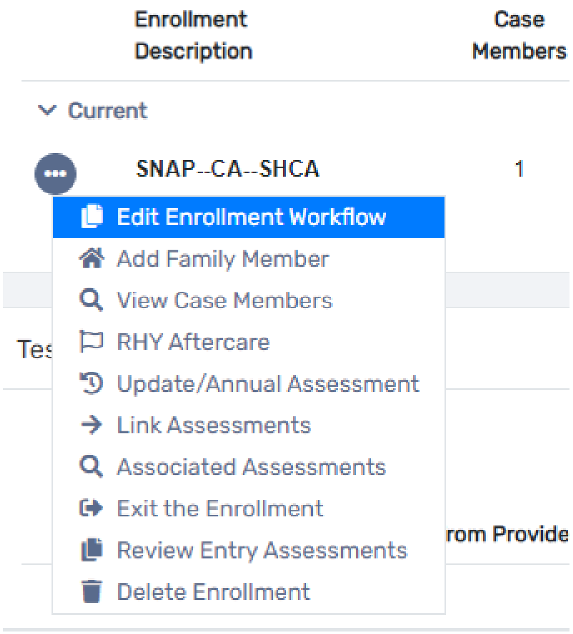
Action Buttons

The Action Buttons in New ClientTrack look different! However, they provide the exact same functionality you've come to expect from version 19.

ClientTrack 19



New ClientTrack



Before the live demonstration…