

Spokane CMIS

New ClientTrack Training

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

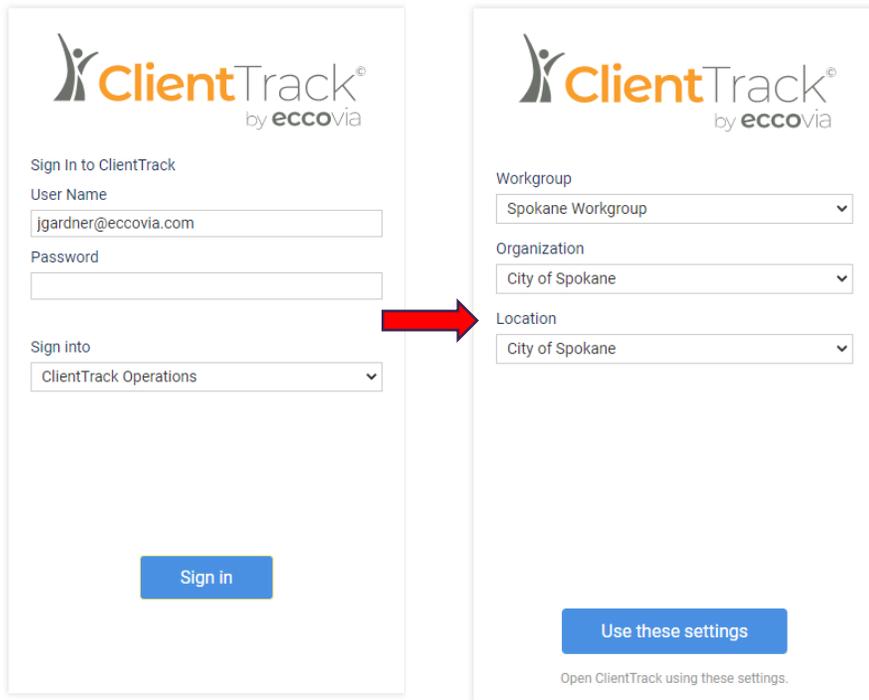
- **Welcome & Introductions**
- **Important Notes Before We Begin**
- **Overview of Changes**
 - Login Screen
 - Account Settings
 - Overview When First Logging Into ClientTrack
 - Menu Groups and Menu Options
 - Workspaces
 - Home
 - Client
 - Housing
 - Support
 - Provider
 - Reports
 - Favorites
- 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



ClientTrack[®]
by eccovia

Sign In to ClientTrack

User Name
jgardner@eccovia.com

Password

Sign into
ClientTrack Operations

Sign in

Workgroup
Spokane Workgroup

Organization
City of Spokane

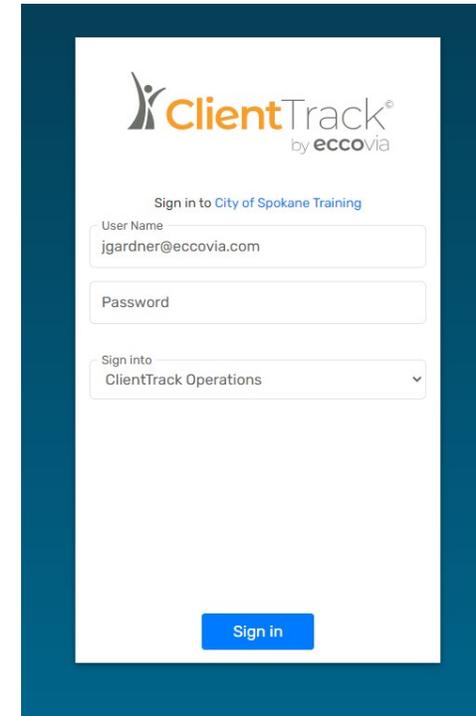
Location
City of Spokane

Use these settings

Open ClientTrack using these settings.

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

New ClientTrack



ClientTrack[®]
by eccovia

Sign in to City of Spokane Training

User Name
jgardner@eccovia.com

Password

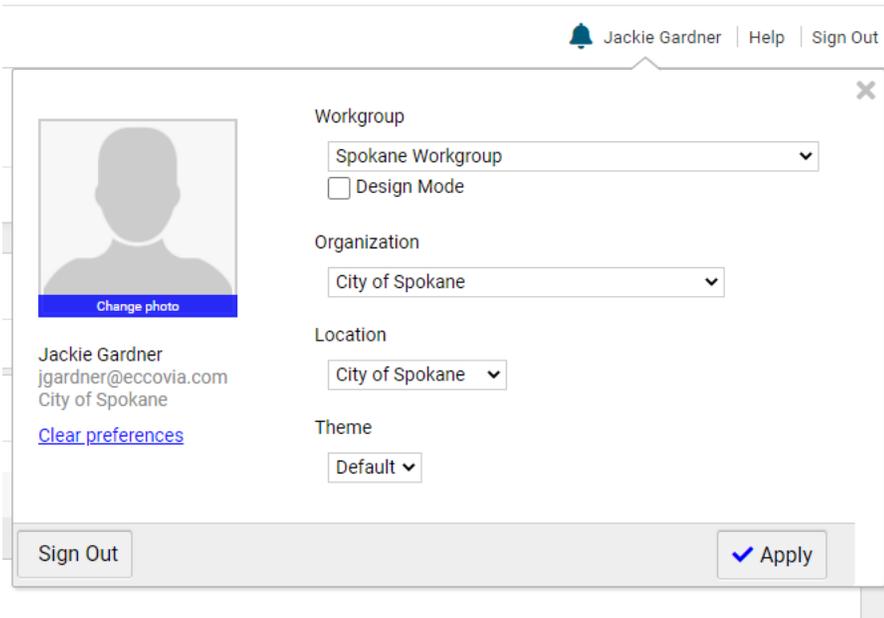
Sign into
ClientTrack Operations

Sign in

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

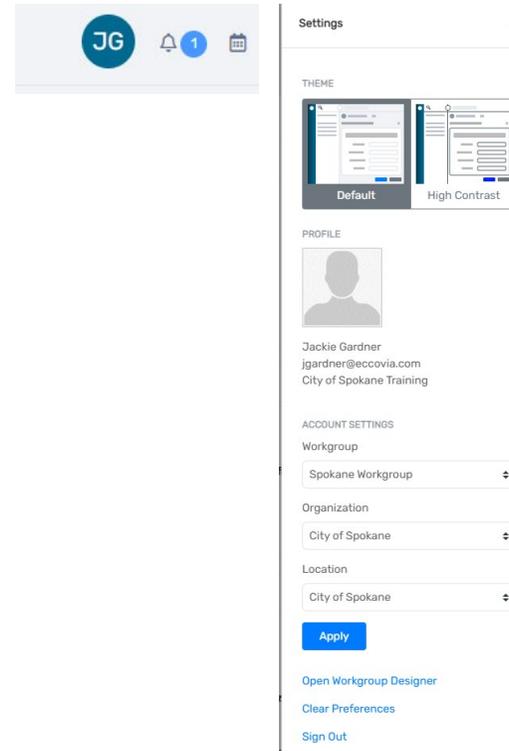
Account Settings

ClientTrack 19



The screenshot shows the 'Account Settings' dialog box in ClientTrack 19. At the top, it displays the user's name 'Jackie Gardner', a 'Help' link, and a 'Sign Out' link. The dialog is divided into several sections: a profile section with a placeholder photo and a 'Change photo' button; a 'Workgroup' section with a dropdown menu set to 'Spokane Workgroup' and a 'Design Mode' checkbox; an 'Organization' section with a dropdown menu set to 'City of Spokane'; a 'Location' section with a dropdown menu set to 'City of Spokane'; and a 'Theme' section with a dropdown menu set to 'Default'. At the bottom, there are 'Sign Out' and 'Apply' buttons.

New ClientTrack



The screenshot shows the 'Settings' panel in the New ClientTrack interface. At the top, there is a user profile card with initials 'JG', a notification bell with '1', and a calendar icon. The 'Settings' panel is titled 'Settings' and has a close button. It is organized into sections: 'THEME' with two preview cards for 'Default' and 'High Contrast'; 'PROFILE' with a placeholder photo and the user's name 'Jackie Gardner', email 'jgardner@eccovia.com', and organization 'City of Spokane Training'; and 'ACCOUNT SETTINGS' which includes dropdown menus for 'Workgroup' (Spokane Workgroup), 'Organization' (City of Spokane), and 'Location' (City of Spokane). At the bottom of the 'ACCOUNT SETTINGS' section are 'Apply', 'Open Workgroup Designer', 'Clear Preferences', and 'Sign Out' buttons.

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

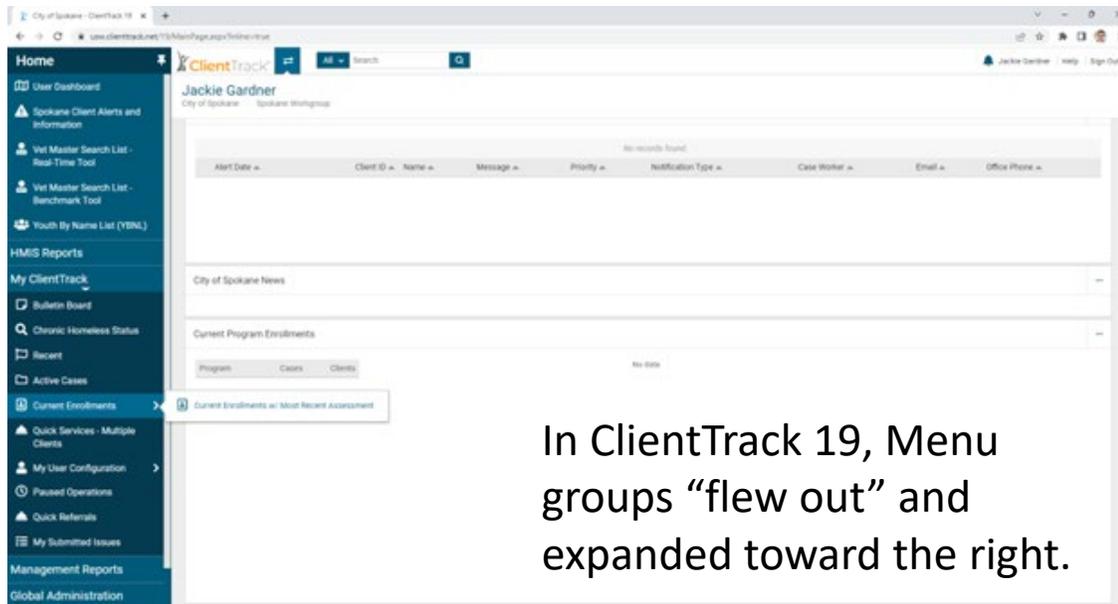
The screenshot shows the ClientTrack 19 dashboard for Jackie Gardner. The left sidebar contains a navigation menu with categories: Home, User Dashboard, Spokane Client Alerts and Information, Vet Master Search List - Real-Time Tool, Vet Master Search List - Benchmark Tool, Youth By Name List (YBNL), HMIS Reports, My ClientTrack (with sub-items: Bulletin Board, Chronic Homeless Status, Recent, Active Cases, Current Enrollments, Quick Services - Multiple Clients, My User Configuration, Paused Operations, Quick Referrals, My Submitted Issues), Management Reports, and Global Administration. The main content area displays a 'Welcome Jackie Gardner' message, followed by 'Spokane Regional COVID-19 Information and Updates', a 'COVID Alert Dashboard' with a table of records (showing 'No records found'), 'City of Spokane News', and 'Current Program Enrollments' with a table showing 'No data'.

The screenshot shows the New ClientTrack dashboard for Jackie Gardner. The left sidebar is a simplified navigation menu with items: User Dashboard, Spokane Client Alerts and Information, Vet Master Search List - Real-Time Tool, Vet Master Search List - Benchmark Tool, Youth By Name List (YBNL), HMIS Reports, My ClientTrack, Management Reports, and Global Administration (Spokane Workgroup). The main content area displays a 'Welcome Jackie Gardner' message, followed by 'Spokane Regional COVID-19 Information and Updates', a 'COVID' alert for David Lewis (dated 12/9/2020 1:12:00 PM) with the text 'WEAR A DANG MASK!!!!!!' and a 'Read More' link, a 'COVID Alert Dashboard' with a table of records (showing 'No records found'), 'City of Spokane News', and 'Current Program Enrollments' with a bar chart and table. The bar chart shows cases and clients for various programs, with the highest values for 'CC Partnership--RRM--Rehousing (CHG)' and 'CC Partnership--RRM--Rehousing (ESG)'. The table below the chart shows the following data:

Program	Cases	Clients
CC Partnership--RRM--Rehousing (CHG)	1	1
CC Partnership--RRM--Rehousing (ESG)	1	2
CC--CA-HFCA	6	6
CC--ES--HOC Shelter	1	1
CC--ES--SMS Shelter	2	2

Menu Groups and Menu Options

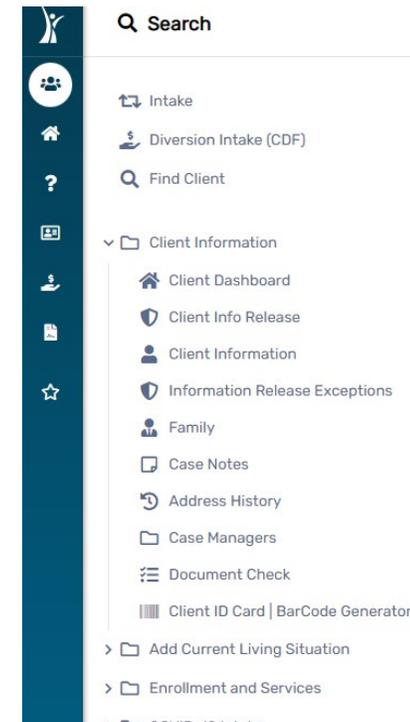
ClientTrack 19



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

New ClientTrack

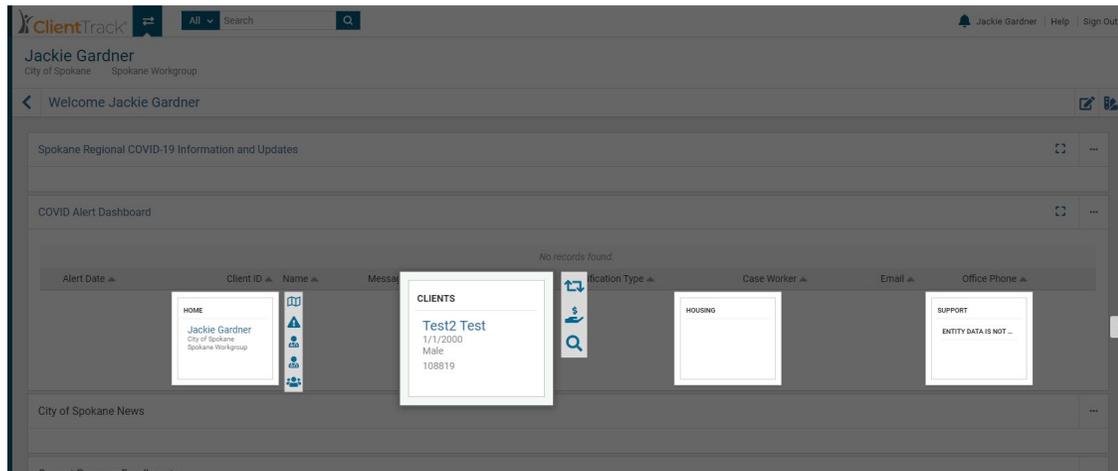
In New ClientTrack, menus open and expand DOWN the page!



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!

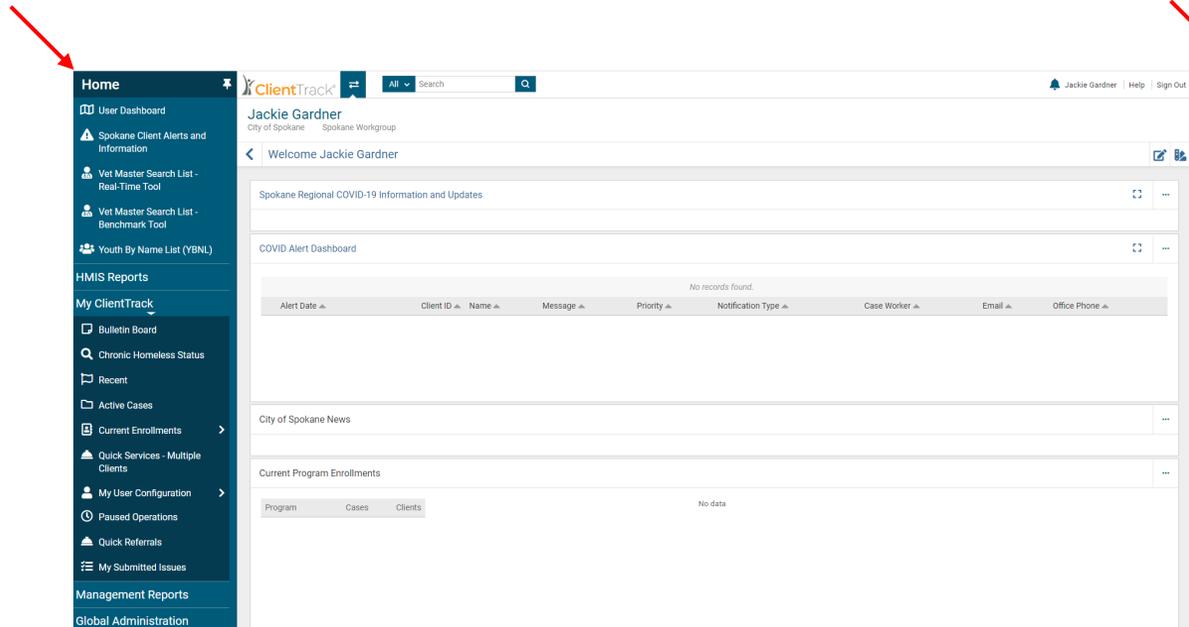
See Ya Later Carousel



Home Workspace

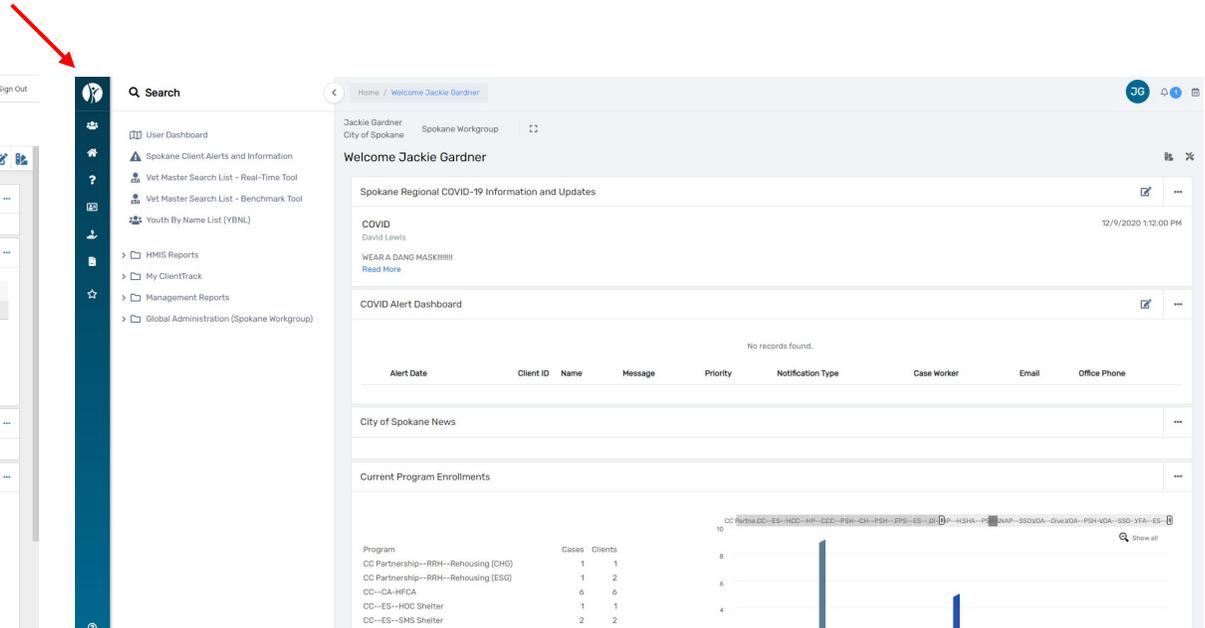
The Home Workspace provides the same menu groups and menu options. To access the Home Workspace in New ClientTrack, simply click the “Skippy” Icon at the very top of the workspace list.

ClientTrack 19



A screenshot of the ClientTrack 19 Home Workspace. A red arrow points to the 'Home' menu item in the left sidebar. The main content area displays a 'Welcome Jackie Gardner' message and several sections: 'Spokane Regional COVID-19 Information and Updates', 'COVID Alert Dashboard' (with a table of records), 'City of Spokane News', and 'Current Program Enrollments' (with a table of program, cases, and clients).

New ClientTrack



A screenshot of the New ClientTrack Home Workspace. A red arrow points to the 'Skippy' icon (a person with a checkmark) at the top of the left sidebar. The main content area displays a 'Welcome Jackie Gardner' message and several sections: 'Spokane Regional COVID-19 Information and Updates', 'COVID' (with a card for David Lewis), 'COVID Alert Dashboard' (with a table of records), 'City of Spokane News', and 'Current Program Enrollments' (with a table of program, cases, and clients).

Program	Cases	Clients
CC Partnership--RRM--Rehousing (CHG)	1	1
CC Partnership--RRM--Rehousing (ESG)	1	2
CC--CA-HFCA	6	6
CC--ES--HOC Shelter	1	1
CC--ES--SMS Shelter	2	2

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

The screenshot shows the ClientTrack 19 interface. On the left is a dark blue sidebar menu with categories like 'Clients', 'Client Information', 'Family', 'Case Notes', 'Address History', 'Case Managers', 'Document Check', 'Client ID Card | BarCode Generator', 'Add Current Living Situation', 'Enrollment and Services', 'COVID-19 Intake', 'SSVF & Veteran Services', 'Coordinated Entry Services', and 'RHY Assessments'. The main content area is titled 'Test2 Test's Dashboard' and displays client information for 'Test2 Test' (1/1/2000, Male, 108819). Below this are sections for 'Test2's Case Managers', 'Test2's Enrollments', and 'Test2's Referrals', all showing 'No records found.' with table headers for each section.

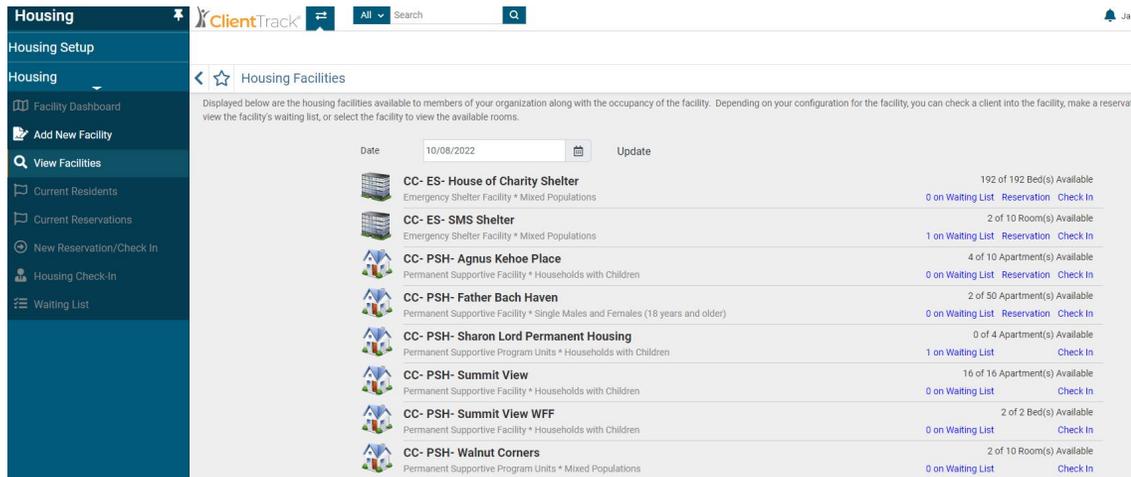
New ClientTrack

The screenshot shows the New ClientTrack interface. On the left is a dark blue sidebar menu with categories like 'Intake', 'Client Information', 'Add Current Living Situation', 'Enrollment and Services', 'COVID-19 Intake', 'SSVF & Veteran Services', 'Coordinated Entry Services', 'RHY Assessments', 'HOPWA', 'Common Assessments', 'SPDAT Assessments', and 'Other Assessments'. The main content area is titled 'test testing's Dashboard' and displays client information for 'test testing' (1/1/2002, Female, 672). Below this are sections for 'test's Case Managers' and 'test's Enrollments'. The 'test's Case Managers' section shows 1 result found in a table with columns: Case Manager, Begin Date, Status, End Date, Enrollment, Office Phone, and User Ext. The 'test's Enrollments' section shows 4 results found in a table with columns: Enrollment Description, Case Members, Project Start Date, Housing Move-In Date, Exit Date, Exit Destination, Organization, and Last Assessment Completed.

Housing Workspace

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

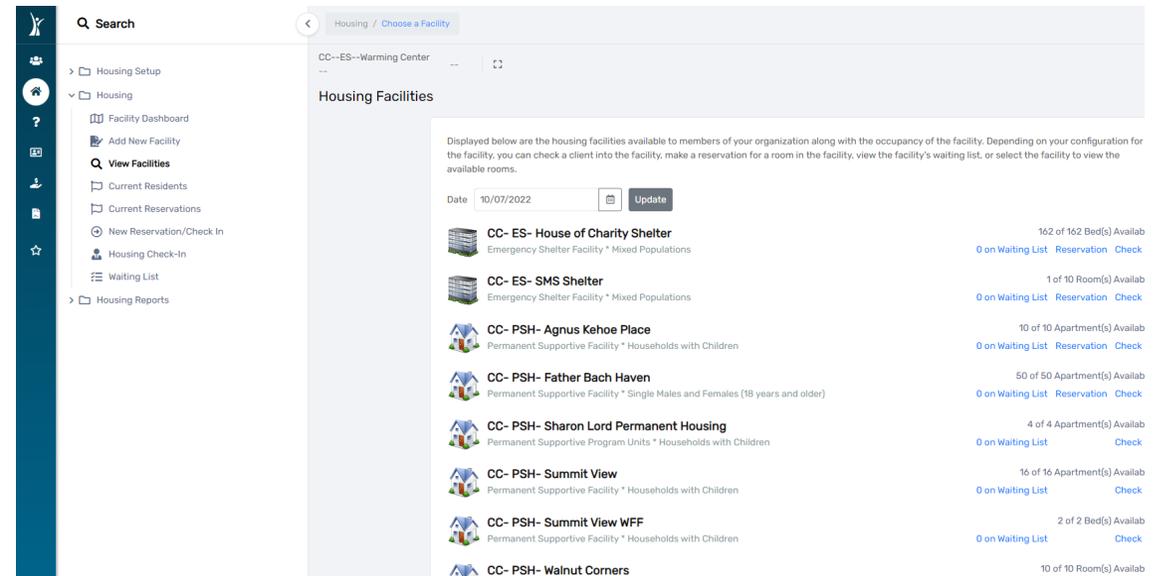
ClientTrack 19



The screenshot shows the ClientTrack 19 interface for the Housing workspace. The left sidebar contains navigation options: Housing Setup, Housing, Facility Dashboard, Add New Facility, View Facilities, Current Residents, Current Reservations, New Reservation/Check In, Housing Check-In, and Waiting List. The main content area is titled 'Housing Facilities' and includes a search bar and a date filter set to 10/08/2022. Below this is a table of facilities with columns for facility name, type, occupancy, and actions.

Facility Name	Type	Occupancy	Actions
CC- ES- House of Charity Shelter	Emergency Shelter Facility * Mixed Populations	192 of 192 Bed(s) Available	0 on Waiting List Reservation Check In
CC- ES- SMS Shelter	Emergency Shelter Facility * Mixed Populations	2 of 10 Room(s) Available	1 on Waiting List Reservation Check In
CC- PSH- Agnus Kehoe Place	Permanent Supportive Facility * Households with Children	4 of 10 Apartment(s) Available	0 on Waiting List Reservation Check In
CC- PSH- Father Bach Haven	Permanent Supportive Facility * Single Males and Females (18 years and older)	2 of 50 Apartment(s) Available	0 on Waiting List Reservation Check In
CC- PSH- Sharon Lord Permanent Housing	Permanent Supportive Program Units * Households with Children	0 of 4 Apartment(s) Available	1 on Waiting List Check In
CC- PSH- Summit View	Permanent Supportive Facility * Households with Children	16 of 16 Apartment(s) Available	0 on Waiting List Check In
CC- PSH- Summit View WFF	Permanent Supportive Facility * Households with Children	2 of 2 Bed(s) Available	0 on Waiting List Check In
CC- PSH- Walnut Corners	Permanent Supportive Program Units * Mixed Populations	2 of 10 Room(s) Available	0 on Waiting List Check In

New ClientTrack



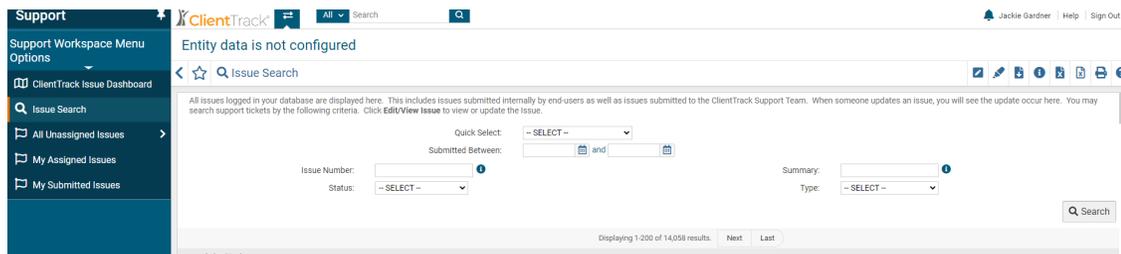
The screenshot shows the New ClientTrack interface for the Housing workspace. The left sidebar contains navigation options: Search, Housing Setup, Housing, Facility Dashboard, Add New Facility, View Facilities, Current Residents, Current Reservations, New Reservation/Check In, Housing Check-In, and Waiting List. The main content area is titled 'Housing Facilities' and includes a search bar and a date filter set to 10/07/2022. Below this is a table of facilities with columns for facility name, type, occupancy, and actions.

Facility Name	Type	Occupancy	Actions
CC- ES- House of Charity Shelter	Emergency Shelter Facility * Mixed Populations	162 of 162 Bed(s) Availab	0 on Waiting List Reservation Check
CC- ES- SMS Shelter	Emergency Shelter Facility * Mixed Populations	1 of 10 Room(s) Availab	0 on Waiting List Reservation Check
CC- PSH- Agnus Kehoe Place	Permanent Supportive Facility * Households with Children	10 of 10 Apartment(s) Availab	0 on Waiting List Reservation Check
CC- PSH- Father Bach Haven	Permanent Supportive Facility * Single Males and Females (18 years and older)	50 of 50 Apartment(s) Availab	0 on Waiting List Reservation Check
CC- PSH- Sharon Lord Permanent Housing	Permanent Supportive Program Units * Households with Children	4 of 4 Apartment(s) Availab	0 on Waiting List Check
CC- PSH- Summit View	Permanent Supportive Facility * Households with Children	16 of 16 Apartment(s) Availab	0 on Waiting List Check
CC- PSH- Summit View WFF	Permanent Supportive Facility * Households with Children	2 of 2 Bed(s) Availab	0 on Waiting List Check
CC- PSH- Walnut Corners	Permanent Supportive Program Units * Mixed Populations	10 of 10 Room(s) Availab	0 on Waiting List Check

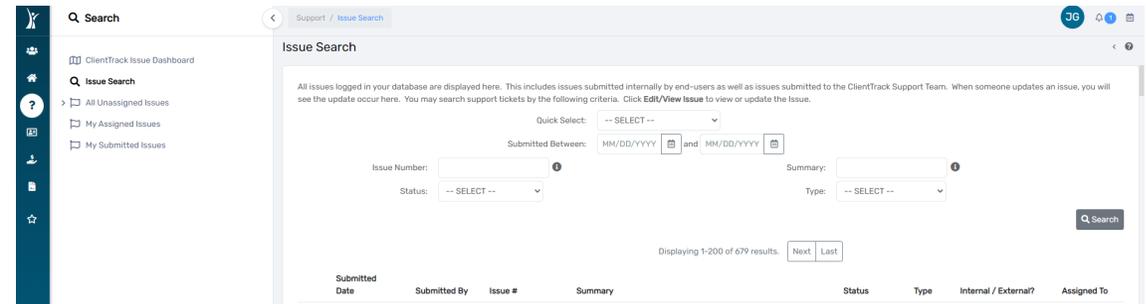
Support Workspace

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

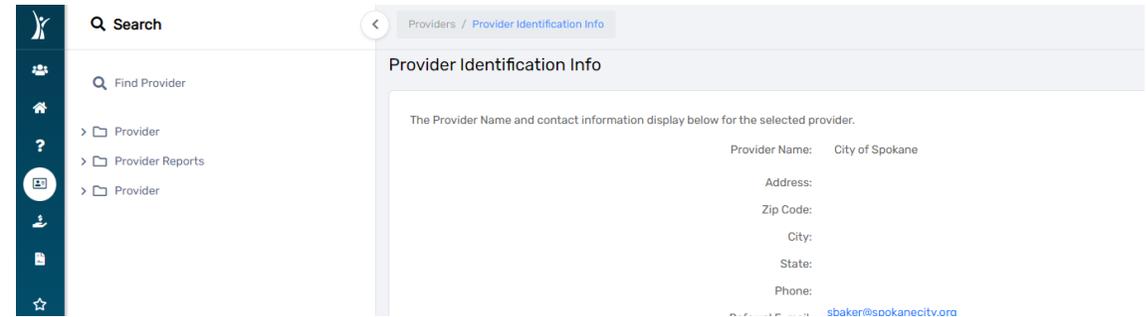
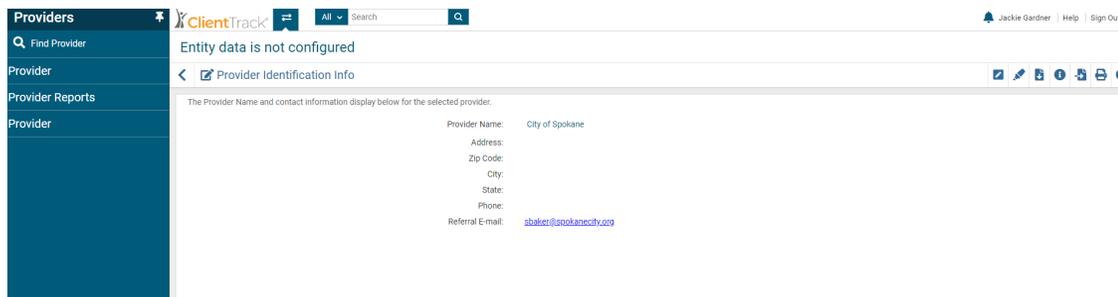


Provider Workspace

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

ClientTrack 19

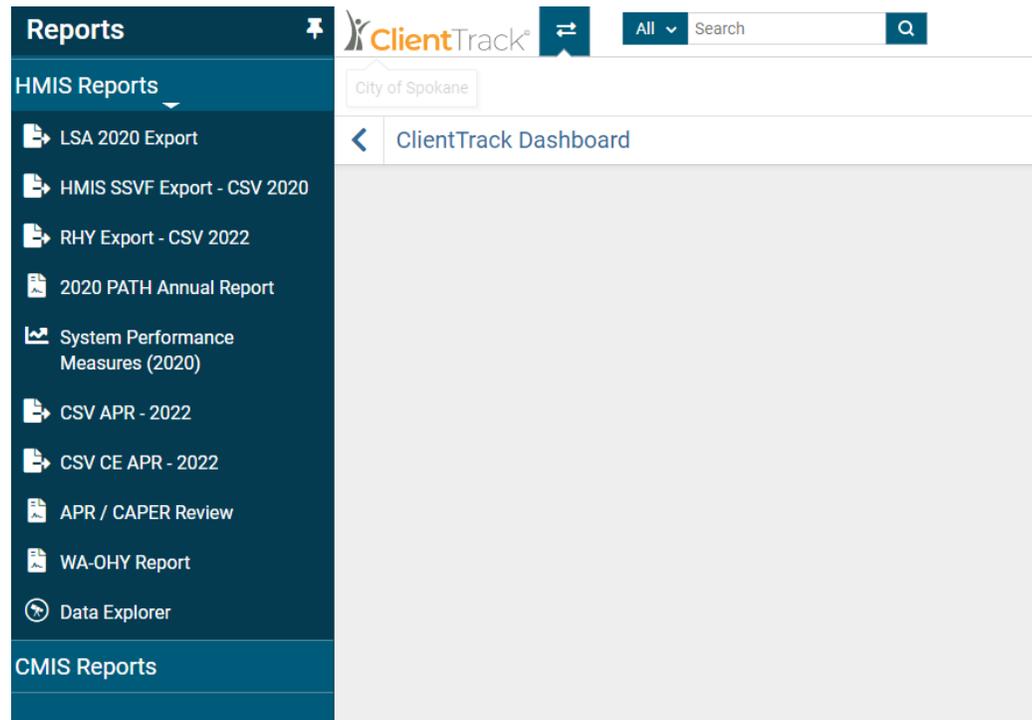
New ClientTrack



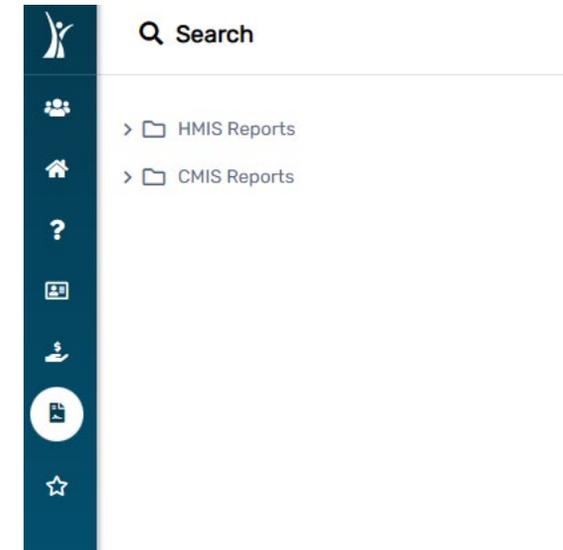
Reports Workspace

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

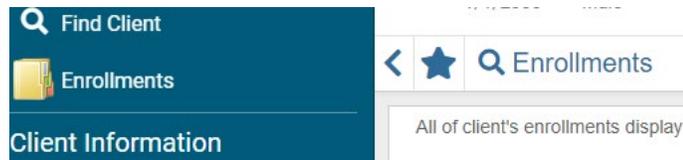


Favorites in ClientTrack

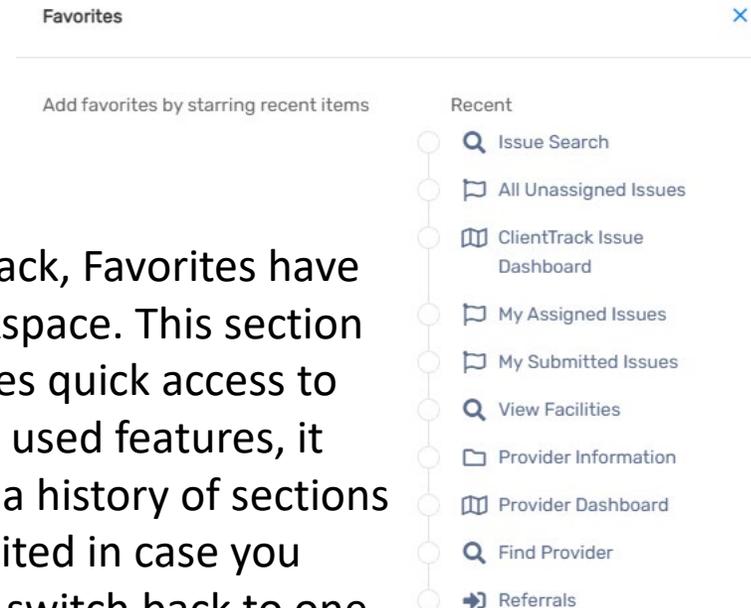
Clicking an available Star Icon in ClientTrack creates an easily accessible “favorite” to help you streamline your work in the system. New ClientTrack handles favorites a little differently than version 19.

ClientTrack 19

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



New ClientTrack

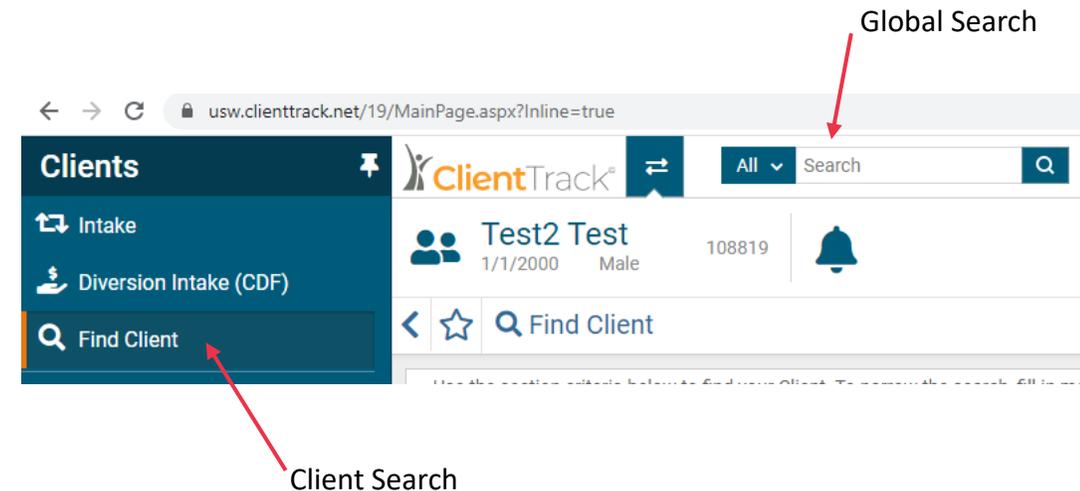


In New ClientTrack, Favorites have their own Workspace. This section not only provides quick access to your frequently used features, it also shows you a history of sections you recently visited in case you need to quickly switch back to one.

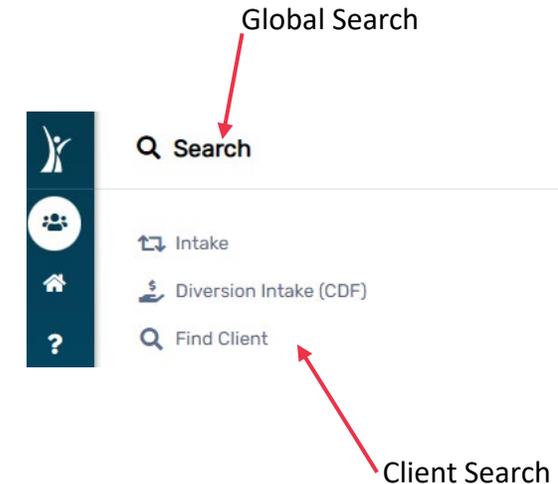
Search Features in ClientTrack

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



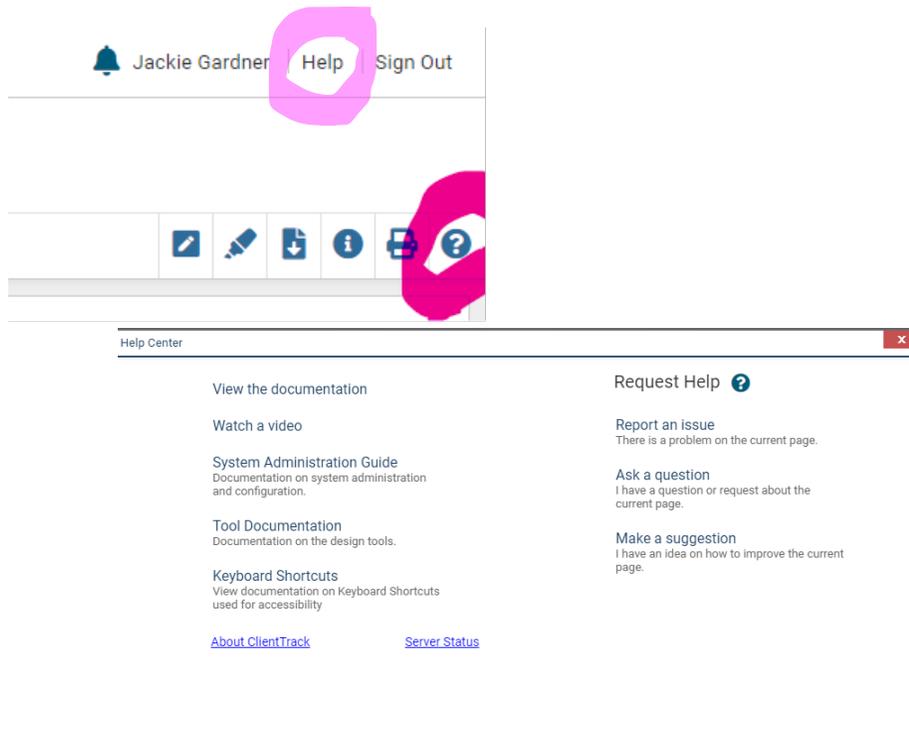
New ClientTrack



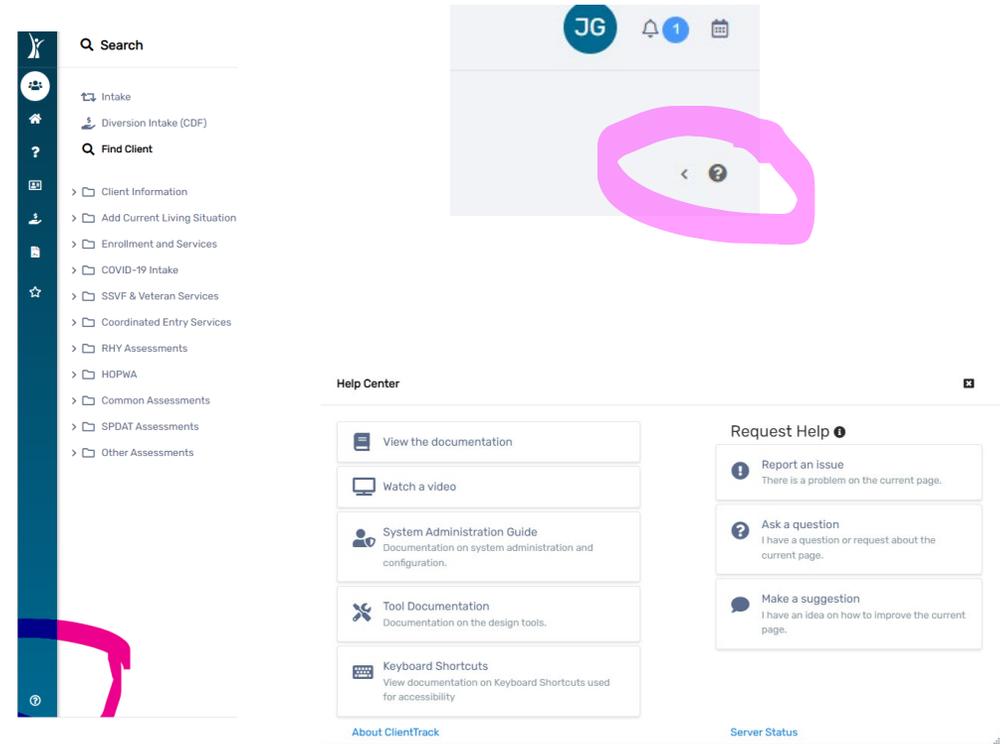
Getting Help in ClientTrack

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



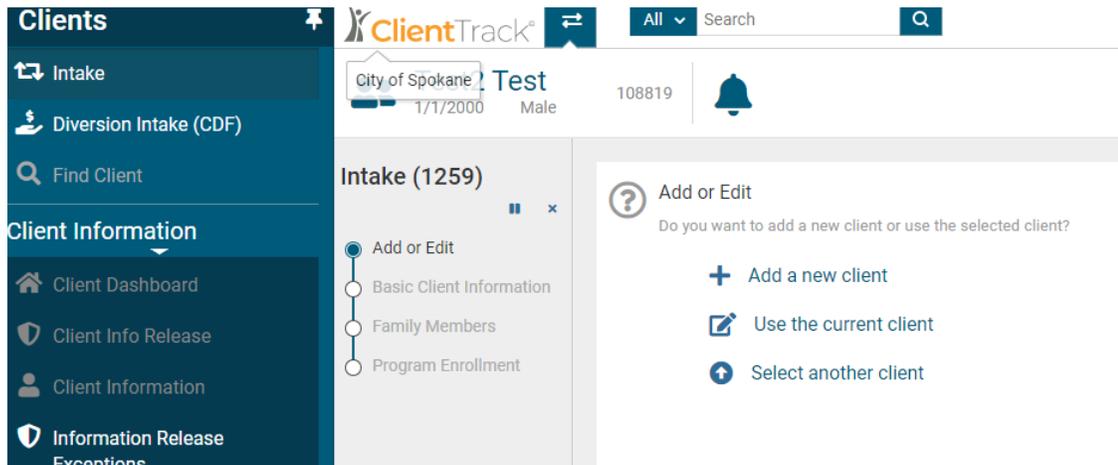
New ClientTrack



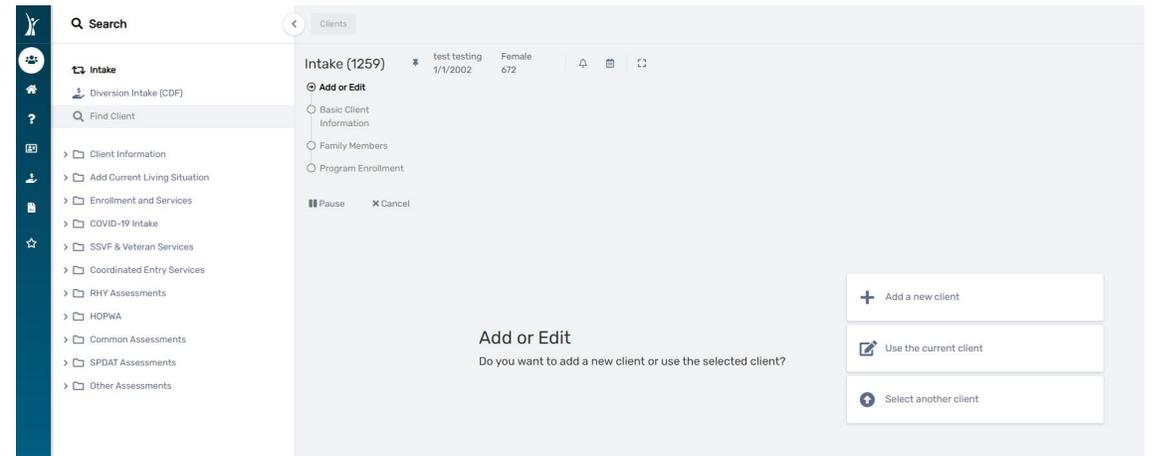
Intake Workflows

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



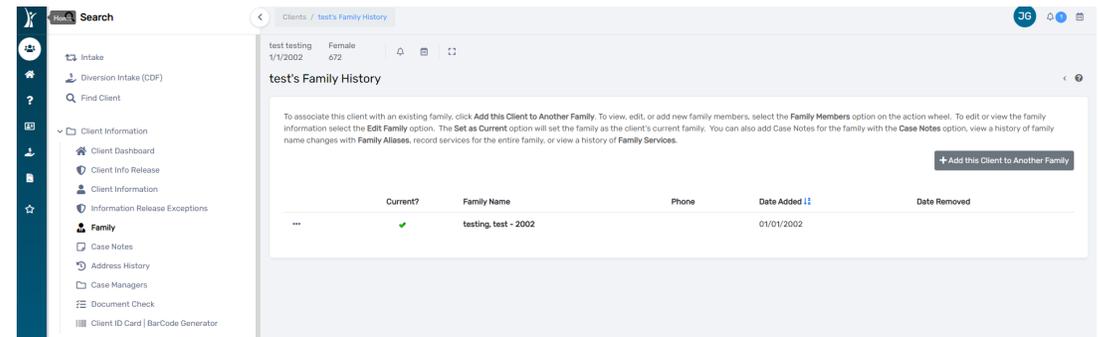
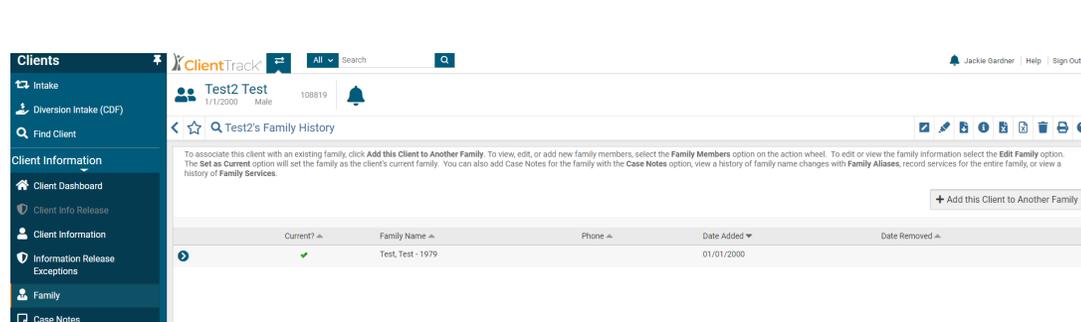
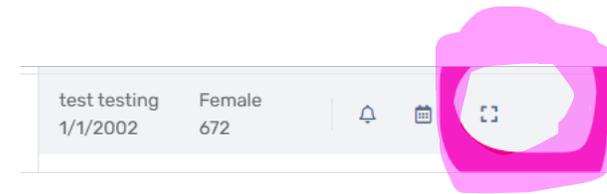
Family Members

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



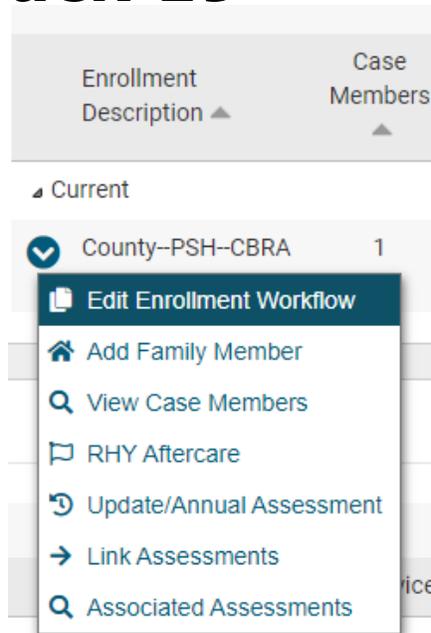
New ClientTrack



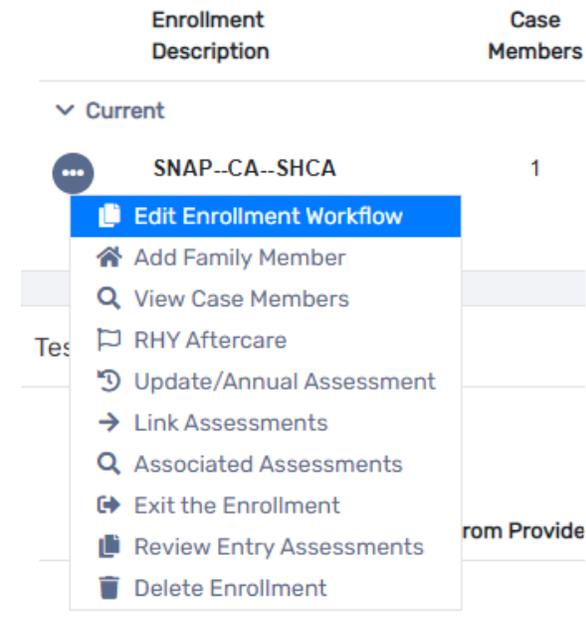
Action Buttons

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...

