



HMIS Document

ClientTrack User Guide

Introduction: Dashboard and System Navigation

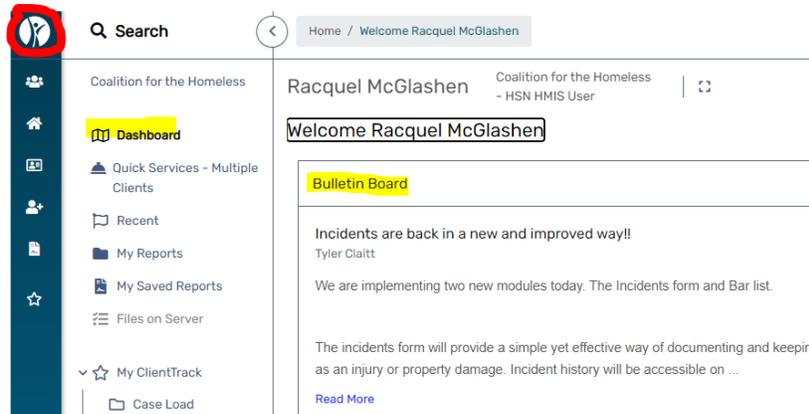
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Client Track User Guide – Intro to the Dashboard & System Navigation

The first icon at the top of the blue menu on the far left side of the screen is your “Home”.

1. Upon logging in to ClientTrack, the default view is the user’s dashboard. You can view the following items on the user dashboard in the middle of the screen:

a. Bulletin Board – users can view HMIS-related announcements in this section.



b. Current Program Enrollments – users can view active program enrollments and the number of existing cases for each program under their organization in this section.

The screenshot shows the 'Current Program Enrollments' section. It contains a table with the following data:

ProgramName	Cases	Clients
Catholic Charities-HUD II Housing & Support Services:RRH	1	2
Coalition for the Homeless-After Hours Emergency Shelter: ES	1	2
Coalition for the Homeless-Center for Women & Families:ES	3	5
Coalition for the Homeless-City of Orlando-ESG-CV Housing & Services:RRH	3	3
Coalition for the Homeless-Community Health Initiative:SSO	1	1
Coalition for the Homeless-Community Outreach:SO	2	2
Coalition for the Homeless-DCF ESG-CV Housing & Support Services:RRH	3	4
Coalition for the Homeless-DCF ESG-CV Street Outreach:SO	1	1

c. Case Assignments – users can review current assignments on their caseload in this section.

The screenshot shows the 'My Case Assignments' section. It displays a table with 9 results found. The table has the following columns: Client Name, Begin Date, End Date, Program, Enrollment.CaseID, Household Member, Relationship to HoH, Project Start Date, Housing Move-In Date, Exit Date, Days Enrolled, and Exit Destination.

Client Name	Begin Date	End Date	Program	Enrollment.CaseID	Household Member	Relationship to HoH	Project Start Date	Housing Move-In Date	Exit Date	Days Enrolled	Exit Destination
Brooks, Daniel	02/04/2022		Coordinated Entry	3	mouse, mickey	Self	Feb 4 2022			168	
Brooks, Daniel						Dependent Child	Feb 4 2022			168	Homeless Service Network of Central Florida

2. While under the “Home” section of the system, you can use the menu to the right of the blue bar to view the following items:

a. Quick Services – Multiple Clients

i. This menu item can be used to enter in multiple services simultaneously for a client.

b. Recent

i. This menu item allows the user to view entities worked with recently, such as clients and providers.

c. My ClientTrack

i. *Case Load* – users can view their active case assignments here.

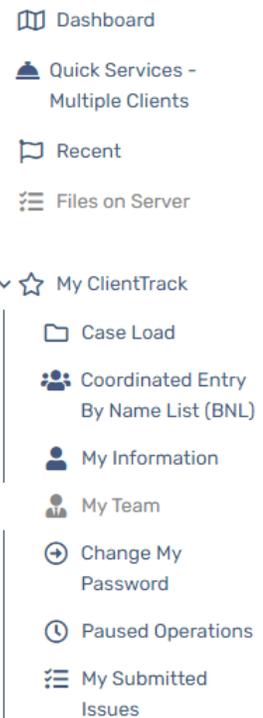
ii. *Coordinated Entry By Name List (BNL)* – this function allows users to view persons listed on the BNL. It displays critical columns of data for each person such as household size, approximate date homeless, chronicity and veteran status.

iii. *My Information* – view and update user information such as email address, address and contact numbers.

iv. *Change My Password* – change your password by entering the current password, then the new password twice. Update your security question here as well.

v. *Paused Operations* – view any unfinished workflows and pick up where you left off. *Tip – users are encouraged to try to finish any workflows when first started.*

vi. *My Submitted Issues* – this is an internal helpdesk tool. Please refrain from submitting any tickets here and instead, use the blue support button on the HMIS website at www.hmiscfl.org or email hmis@hscnfl.org for support.



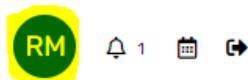
3. At the top left corner of the screen, there is a global “Search” field (has a magnifying glass icon).

a. Use this feature to do a broad search in the database using a client’s name. Search results will display all possible matches across multiple entities in the system.



4. At the top right corner of the screen, there are four functions:

a. User’s initials in a blue circle – this icon allows the user to adjust profile settings.



i. Theme - choose between the default and high contrast view

ii. Profile picture – upload an image as the profile picture

iii. Account settings: Workgroup – controls user role/visibility. This should be defaulted as “HMIS User”.

iv. Account settings: Organization – controls the organizations and related projects a user can edit in the database. Most users only have access to their own agency

v. Account settings: Location

- vi. Security settings: allows the user to change their password, or update their account recovery information (set up a security question).
- vii. Clear preferences: this will put your settings back to its default
- viii. Sign out

b. Notifications (the bell icon)



c. Schedule (the calendar icon)

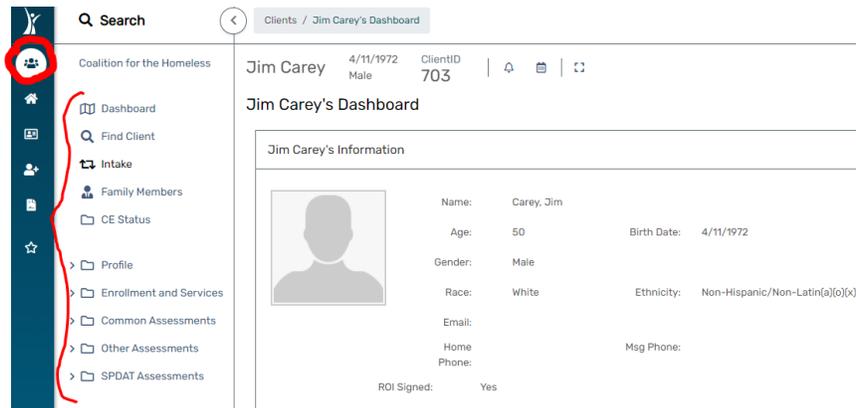


d. Signing out (arrow pointing right icon)

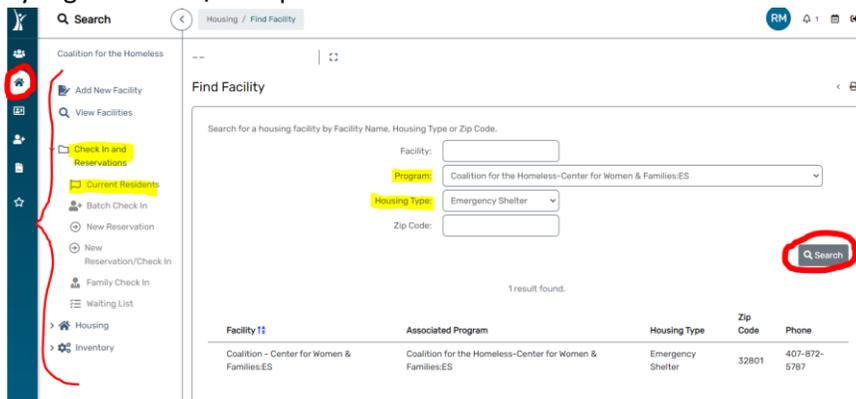


5. Navigate into different workspace in the system by using the menu items in the blue bar to the far left of the screen.

- a. The second icon is the Client workspace. This is where most workflows occur, such as intakes, enrollments, adding services, and setting up goals and case notes. Use the menu to the right of the blue bar to navigate into different assessments and use various functions.



- b. The third icon in the blue menu bar is the Facilities workspace. This section of the system is for emergency shelters, or bed agencies that have a bed list set up and a night-by-night check in/out operation on site.



- c. The fourth icon in the blue menu bar is the Provider section of the system where users can search and review related organization information such as address and contact information. **Note:** Some items in the white menu may not be active/available for users.

Coalition for the Homeless

Provider Identification Info

The Provider Name and contact information display below for the selected provider.

Provider Name: Coalition for the Homeless
 Address: 18 N Terry Ave
 Zip Code: 32801
 City: Orlando
 State: FL
 Phone: 407-426-1257
 Referral E-mail:

- d. The fifth icon in the blue menu bar is Coordinated Entry workspace. Users can view various project under their organization by project type, including any Coordinated Entry project types.

Find Program

The list below displays the programs in the system that are accessible by your organization. Select one.

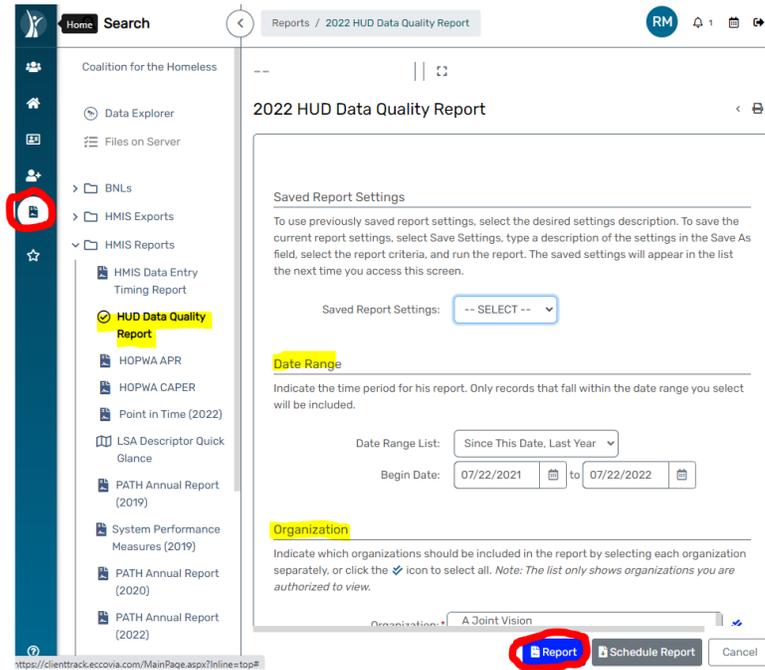
Program:

Project Type: **Coordinated Entry**

Show only HMIS Programs: Emergency Shelter, Transitional Housing
 Show only active programs: PH - Permanent Supportive Housing (disability required for entry), Street Outreach, PH - Rapid Re-Housing, Services Only, Other, Safe Haven, PH - Housing Only, PH - Housing with Services (no disability required for entry), Day Shelter, Homelessness Prevention

Program	Program ID	Program Type	Exit Days	Start Date	Program End Date	Quick Info
Coalition for the Homeless-Diversion:CES	973	Coordinated Entry		2/9/2018		

- e. The sixth icon in the blue menu bar is the Reports workspace. There are large varieties of reports in this system, including reports on enrollments, services and data quality. Click on a desired report, fill in the report settings and click on “report” at the bottom right corner to see reporting outcomes for a project(s). For more information on how to run reports, see the “Reports” user guide and attend a live Reports training session. Submit a request for this training at hmis@hscnfl.org.



- f. The seventh icon in the blue menu bar is the Favorites workspace. Use this function to favorite entities in the system, such as a client caseload, self-sufficiency matrices, paused operations, etc.
- i. The Favorites option will organize selected sections of the systems by workspaces.

