ClientTrack User Manual

Wisconsin DCF

June 2023

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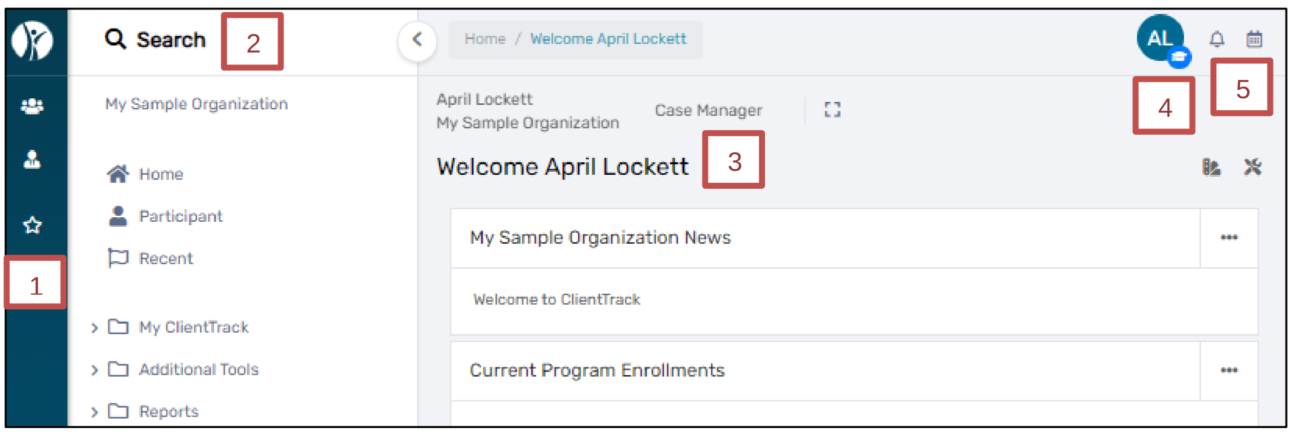
Navigation

This functionality allows a ClientTrack user to navigate from one workspace dedicated to participants, users, reporting, and several other entities to another, according to the setup implemented for the workgroup.

Navigation of Workspaces

When you first log in, you will be taken to the **Home Workspace**, identified in the top left of the screen.

Workspaces function similar to tabs on a web browser. Each Workspace will give you different Menu Groups and Options populated with the forms and functions relevant to the kind of work that Workspace is dedicated to. When you wish to work with Clients, including Client Intake, Assessment, etc., you will use the Client Workspace; when working with multiple Clients or running Reports, you will use the Home Workspace, and so forth.



Regardless of Workspace, the ClientTrack interface employs the following elements:

1. **Main Menu**
   This menu allows you to access multiple tools you may need. The ClientTrack logo at the top will bring you back to your Home.

2. **Global Search Bar**
   Searches both for data and Menu Options. Almost anything you will need can be navigated to from this search bar.

3. **Entity Information**
   Displays information about the Workspace you're currently viewing.

4. **User Icon**
   Selecting your User Icon will open a menu from which you can change your Workgroup, Organization, location, theme, and password.

5. **Notifications**
   You'll be alerted to new notifications here.

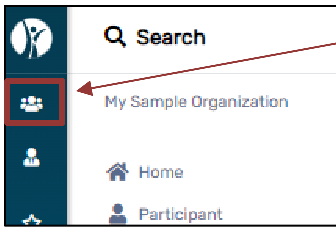
Navigation: Home > Participant > Home > Employers

Find Participant

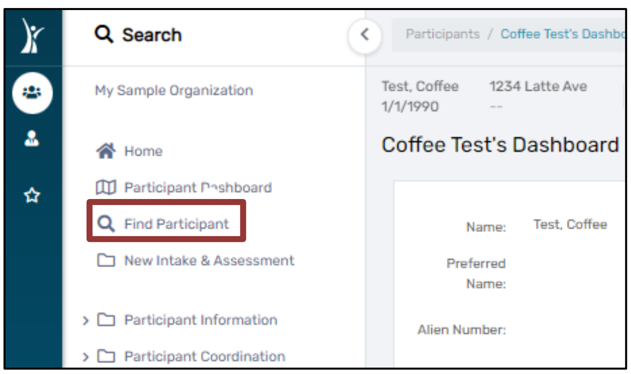
This functionality allows a ClientTrack user to search for and select participants that the user has access to according to the security model implemented for the organization.

Finding a Participant

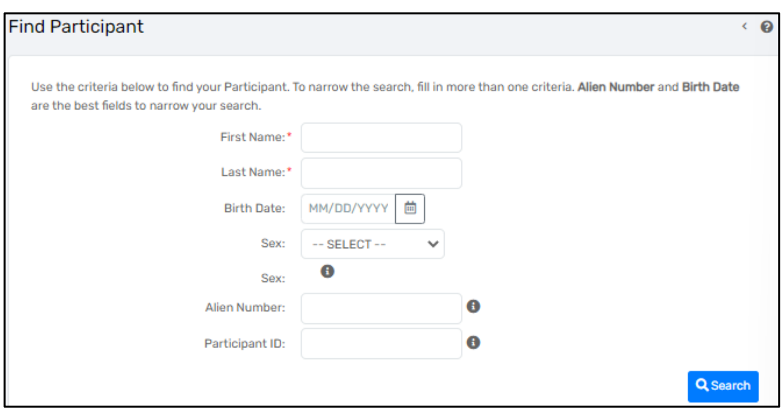
1. From the Main menu, you will click the icon for the Participants workspace.



2. Select **Find Participant** within the Participants menu on the left.



3. Determine the identifying information for search criteria and enter that information before selecting Search. If fields, other than first and last name, are left blank and Search is selected, a list of all participants the user is able to access will be displayed.



4. If several participants appear based on the search criteria, scroll through the list, and select the desired participant by clicking on any of their information on the form. The user will be directed to the selected participant's Dashboard.

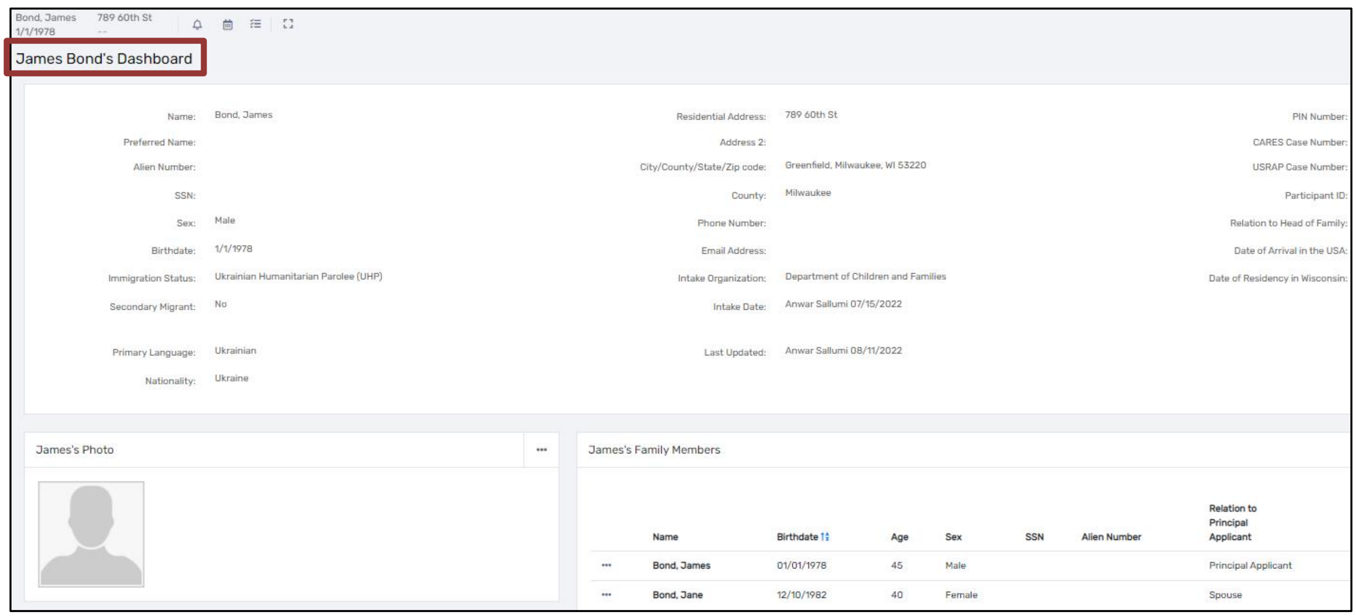
3 results found.

First Name	Last Name	Middle Name	Birth Date	Sex	Date of Arrival or Status Granted	Alien Number	City	Resettlement Agency	Program (Enroll Date - Exit Date, Agency)
Joe	Bond		01/15/2013	Male	07/01/2022		Greenfield		• Refugee School Impact (RSI) (08/24/2022 - , Departm • Refugee School Impact (RSI) (08/15/2022 - , Departm
Jane	Bond		12/10/1982	Female	07/01/2022		Greenfield	World Relief Fox Valley	• Refugee School Impact (RSI) (08/24/2022 - , Departm

Participant Dashboard

1. The participant dashboard will display Demographic information for the client, their Family Members, Notifications, Enrollments, Services.

2. Notifications can be located by selecting the bell icon to the right of the client's name at the top of the screen.



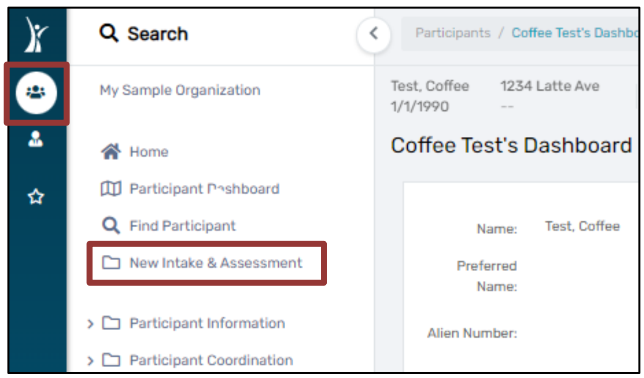
Find a Participant: Participant Workspace > Find a Participant > Participant Dashboard

Completing an Intake

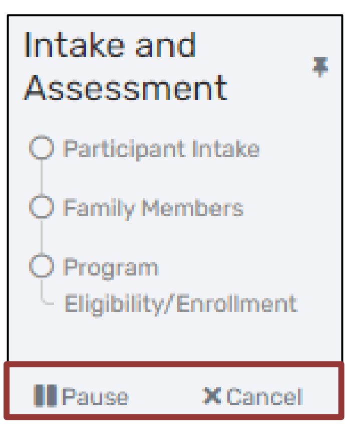
Intake functionality allows for a User to identify and add new participants to the system. An intake ensures that participants are input into the system so that demographics, enrollments, services and referrals can be attributed to the participant.

Intake & Assessment Workflow

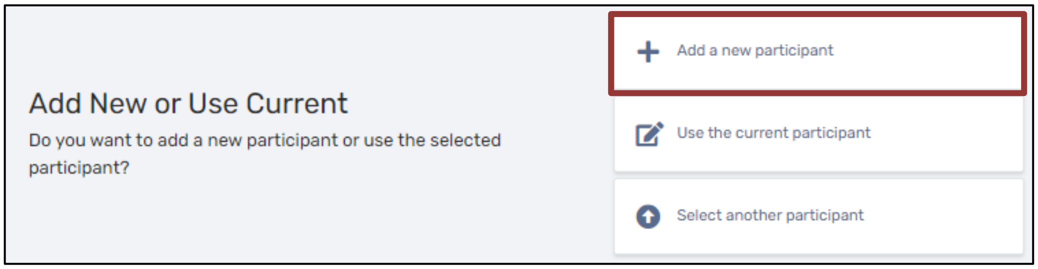
1. Navigate to the Participant workspace and select the New Intake & Assessment Menu Option.



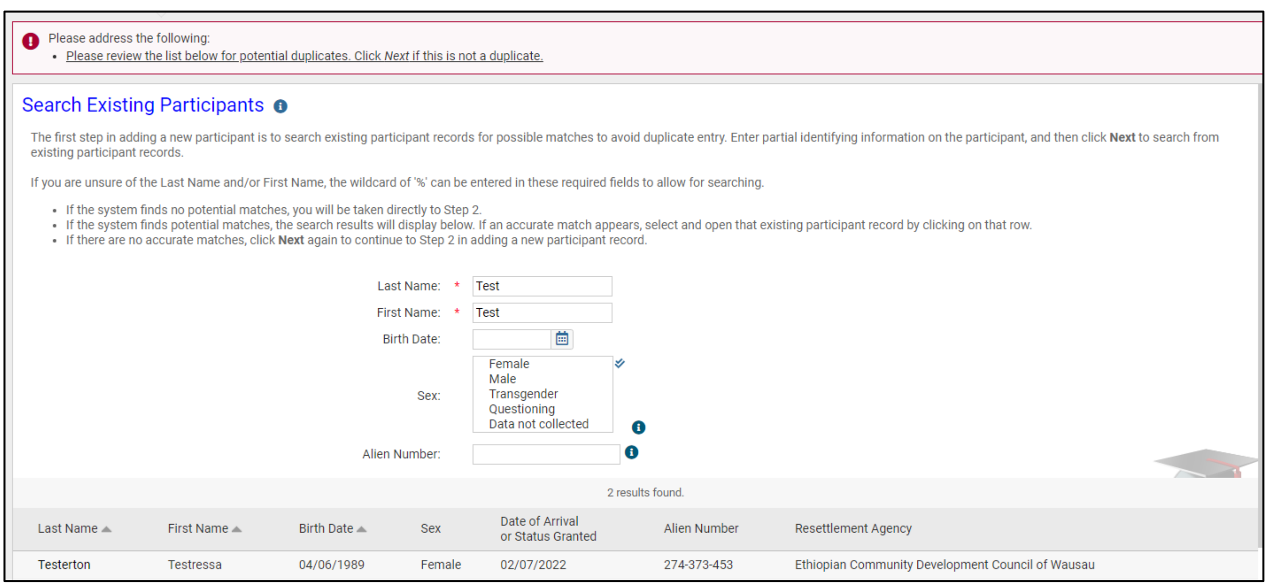
2. Users should now see the Intake & Assessment Workflow. There are two options beneath the workflow that will be available to users.
   a. The first button is a pause button. The pause button will allow the user to pause the workflow, save the progress made, and return later.
   b. The second button is a cancel button. The cancel button will allow the user to remove the progress made and exit the workflow.



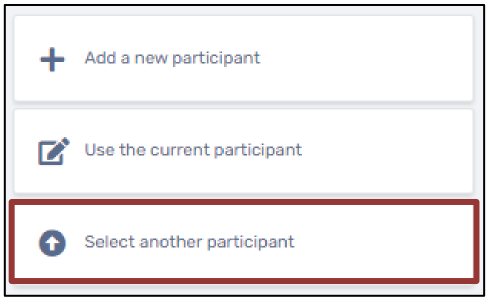
3. Users will see three options for selecting a participant under the Add New or Use Current section: Add a new participant, Use the current participant, and Select another participant



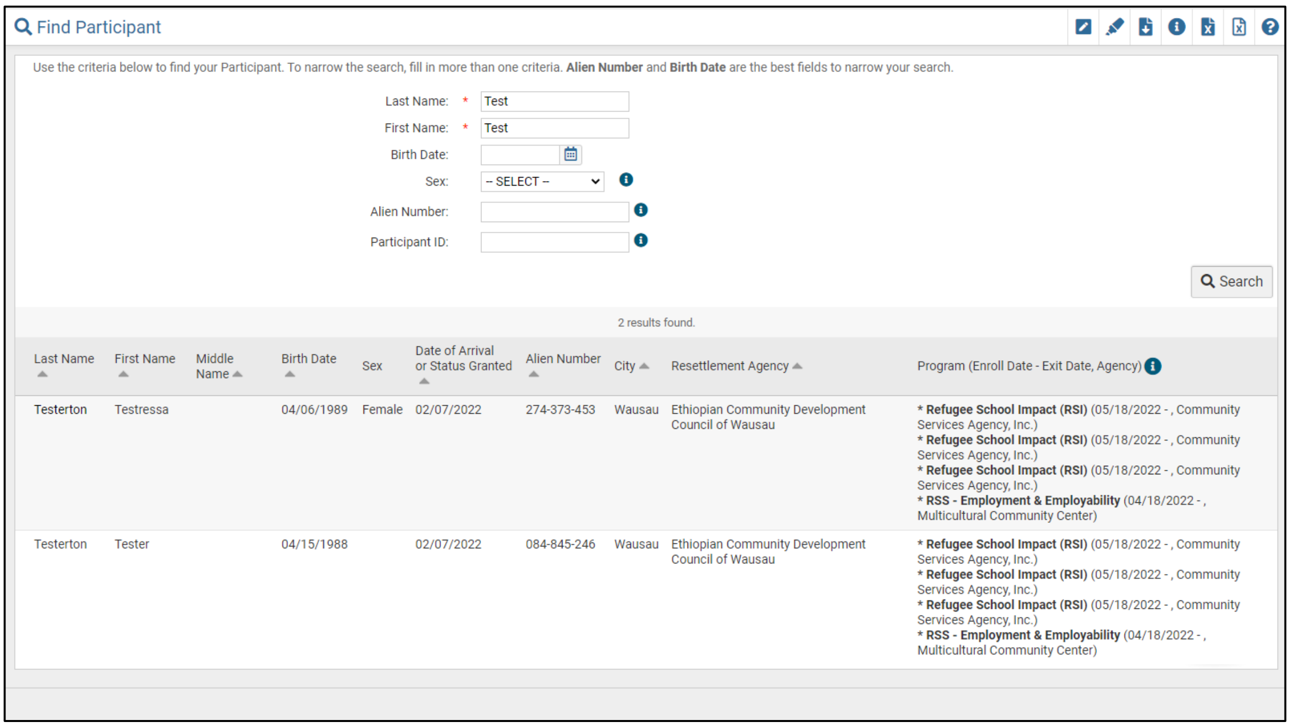
4. Selecting the Add a new participant will allow the user to enter a brand-new participant to the system.
   a. Users will be redirected to the Search Existing Participants page to search participants on Last Name, First Name, Birthdate, Sex, and/or Alien Number. After selecting Next, the system will search for potential participant record matches to avoid duplication of participants.
      i. If no existing participants exist with the information entered, the user will be directed to the Participant Intake form.
      ii. If a potential match is identified based on the search criteria, the user will have two options:
         1. Select a participant from the list of results. Users should only select a participant from the list of results when they are confident that they are the same participants based on information reflected in the record.
         2. Select Next to continue to the Participant Intake to enter a new participant.



5. Selecting Select another participant will redirect the user to the Find Participant search form to search for the existing participant and link to their current record.



   a. By selecting a participant from the list of potential matches, the user will be directed to the Participant Intake form.
   b. If no potential matches appear, the user will need to cancel the workflow by selecting the x above the workflow and restarting it.



Find Participant

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

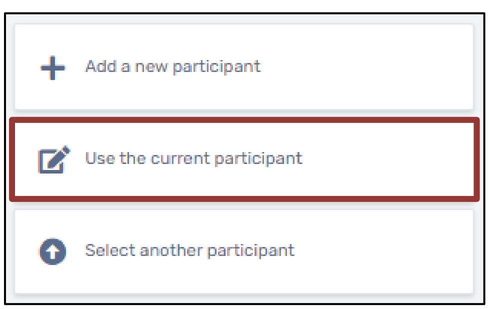
Last Name: * Test
First Name: * Test
Birth Date:
Sex: -- SELECT --
Alien Number:
Participant ID:

Search

2 results found.

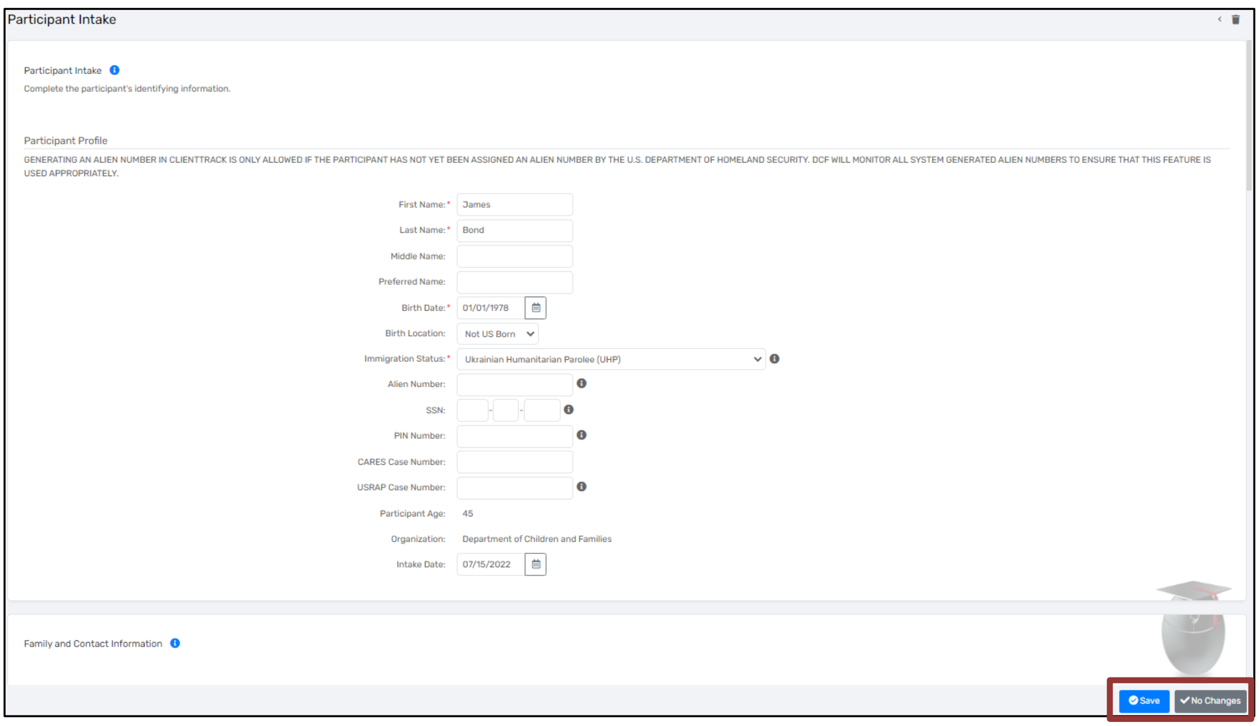
Last Name	First Name	Middle Name	Birth Date	Sex	Date of Arrival or Status Granted	Alien Number	City	Resettlement Agency	Program (Enroll Date - Exit Date, Agency)
Testerton	Testressa		04/06/1989	Female	02/07/2022	274-373-453	Wausau	Ethiopian Community Development Council of Wausau	* **Refugee School Impact (RSI)** (05/18/2022 - , Community Services Agency, Inc.) * **Refugee School Impact (RSI)** (05/18/2022 - , Community Services Agency, Inc.) * **Refugee School Impact (RSI)** (05/18/2022 - , Community Services Agency, Inc.) * **RSS - Employment & Employability** (04/18/2022 - , Multicultural Community Center)
Testerton	Tester		04/15/1988		02/07/2022	084-845-246	Wausau	Ethiopian Community Development Council of Wausau	* **Refugee School Impact (RSI)** (05/18/2022 - , Community Services Agency, Inc.) * **Refugee School Impact (RSI)** (05/18/2022 - , Community Services Agency, Inc.) * **Refugee School Impact (RSI)** (05/18/2022 - , Community Services Agency, Inc.) * **RSS - Employment & Employability** (04/18/2022 - , Multicultural Community Center)

6. Selecting Use the current participant will take the user to the Participant Intake form.



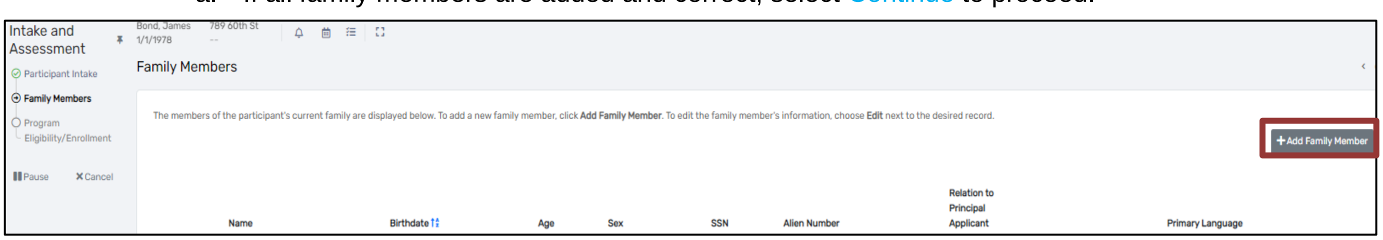
Participant Intake Form

7. The Participant Intake form contains pages for Participant Profile, Family and Contact Information and Immigration & Demographics pages.
    a. Anything marked with a red asterisk will be required before the user can move forward in the Participant Intake. Any fields not marked with the red asterisk are recommended and may be filled out if the information is available and applicable.
    b. If all the required fields are filled in, the user may review, update and/or add information.
        i. If updates or additions are required, the user may make those changes and select Save at the bottom of the page.
        ii. If no updates or additions are required, the user may select No Changes to proceed forward in the workflow.



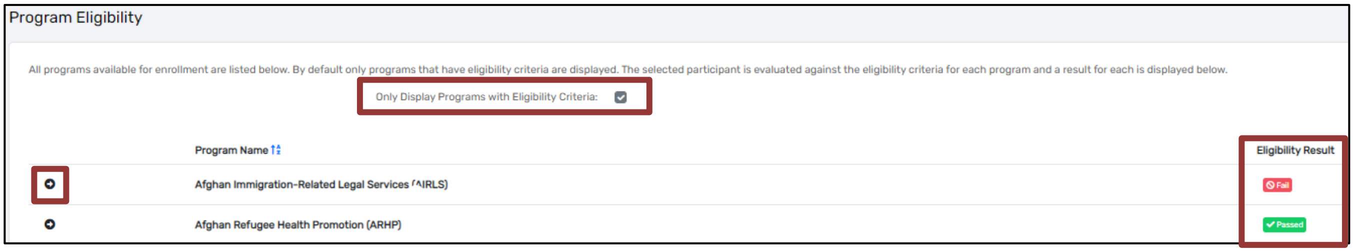
Family Members

8. The user will be directed to the Family Members section of the Intake & Assessment Workflow. This form will display family members already associated to the participant record and allow users to review/add family members on the Family Members form.
    a. If all family members are added and correct, select Continue to proceed.



Program Eligibility / Enrollment

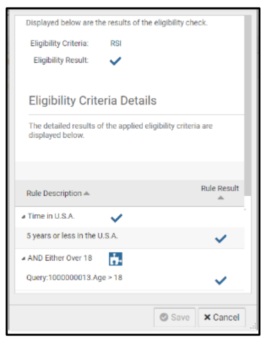
9. The user will be directed to Program Eligibility/Enrollment section of the Intake & Assessment Workflow. This form will display programs that are available to enroll the participant into.



   a. The programs that have eligibility criteria will display as separate rows on the form. Each program should have an Eligibility Result available based on the information entered on the previous forms of the Intake & Assessment Workflow

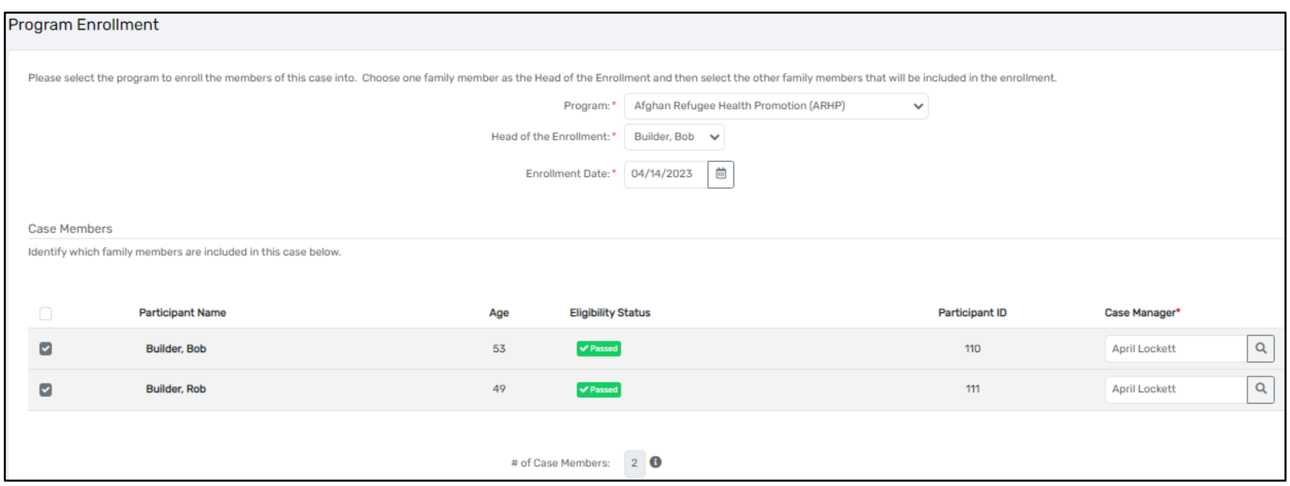
   b. The checkbox at the top of the form will filter out programs that have no eligibility criteria.

   c. Users can select the Eligibility Result to see a pop-up window containing information regarding the eligibility criteria for the program.



10. If the participant should be enrolled into one of the programs, the user may select the Arrow in the row of the program the participant should be enrolled into.

   a. The user will be redirected to the Program Enrollment form. Here, the user will be prompted to select the Head of the Enrollment, Enrollment Date, and select which family members to enroll.



11. Once the Program Enrollment fields are complete, select Save. Users will then be redirected back to the program eligibility screen to complete another enrollment.

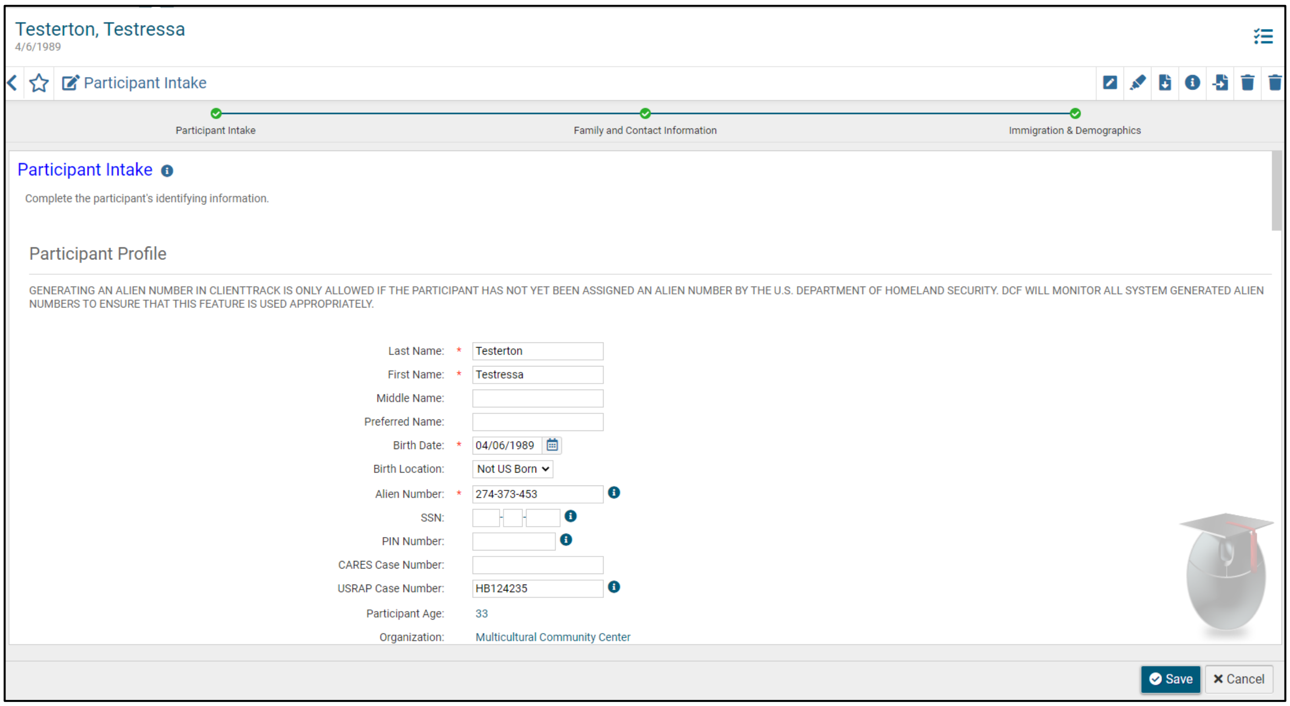
Finish the Workflow

12. If the participant should not be enrolled into one of the programs, the user may select Next to complete the Intake and Assessment Workflow without enrolling the participant.
    a. The user should see the Intake and Assessment workflow have green checkmarks next to all the completed steps. The user may select Finish to close out of the Intake and Assessment workflow and return to the Participant Dashboard.

Completing an Intake: Participant Workspace > New Intake & Assessment Workflow > Add new participant / Use current participant / Find another participant > Family Members / Program Eligibility / Finish Workflow

Editing a Participant Intake Record

1. Find and select the desired participant using ClientTrack search functionality through the Find Participant menu option.
2. Once the correct participant is selected and appears in the Entity toolbar at the top of the page, select the Participant Information menu option. This opens a data entry form that allows the participant's data to be changed.
3. Add/update any participant data fields, as necessary.
4. Select Save to save the newly edited participant record.



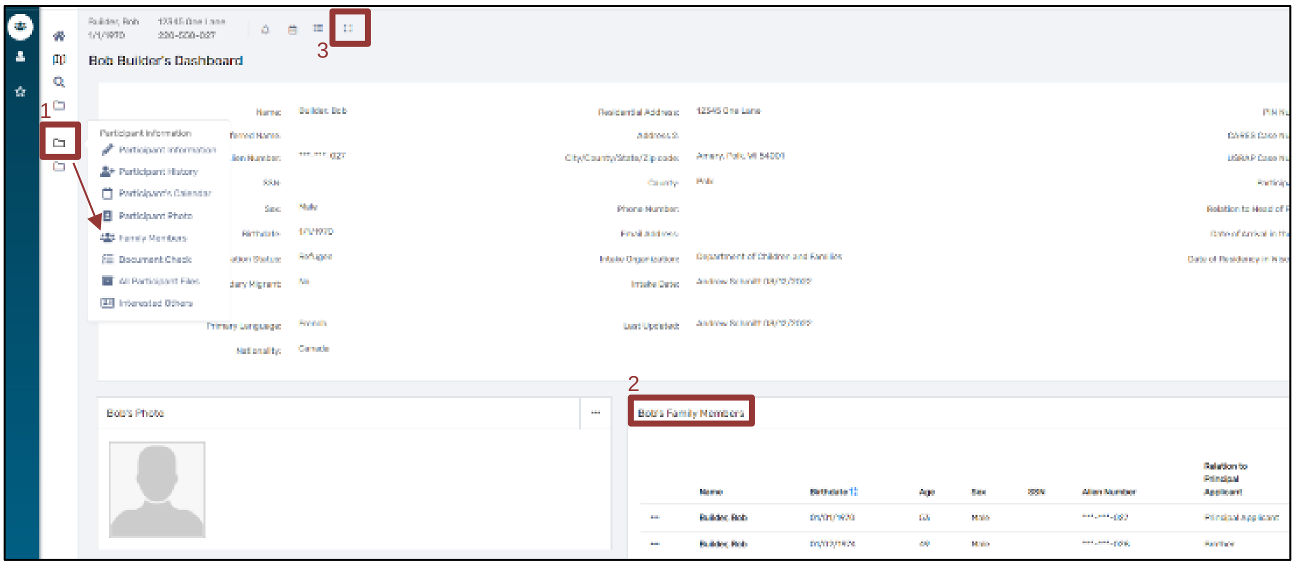
Edit a Participant Intake Record: Participant Workspace > Participant Dashboard > Participant Information

Family Members Management

Family Members functionality allows for a User to view and add Family Members to the selected participant's current family. A Family is defined as any group of one participant or more.

Review Family Members

Family Members can be reviewed and edited in various places through the system. All options will require the user to be in the Participant Workspace, and the Participant to be in focus first.



Option 1:

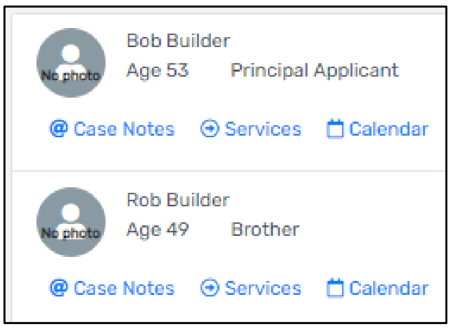
1. Navigate to the Participant workspace and select the Participant Information Menu Group, followed by the Family Members Menu Option.
2. This will redirect users to the Family Members screen where users will have multiple options to Add New, Select the participant, and/or Edit.

Option 2:

1. Navigate to the Participant workspace and select the Participant Dashboard followed by the Participants Family Members dashboard section.
2. This will redirect users to the Family Members screen where users will have multiple options to Add New, Select the participant, and/or Edit.

Option 3:

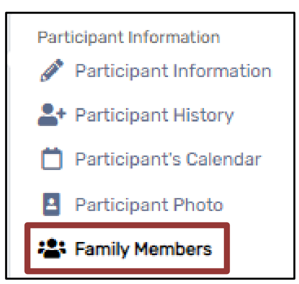
1. Navigate to the Participant workspace and select the Expand button on the Client's dashboard to the right of the participants name at the top left of the screen.
2. This will display each member of the Family and allow the user to select the name of each participant to be redirected to their Participant Dashboard.
    a) Additionally, users will see options for adding Case Notes, Services, and viewing the participants' Calendar. These options act as shortcuts to navigate to those forms for each client in the family.



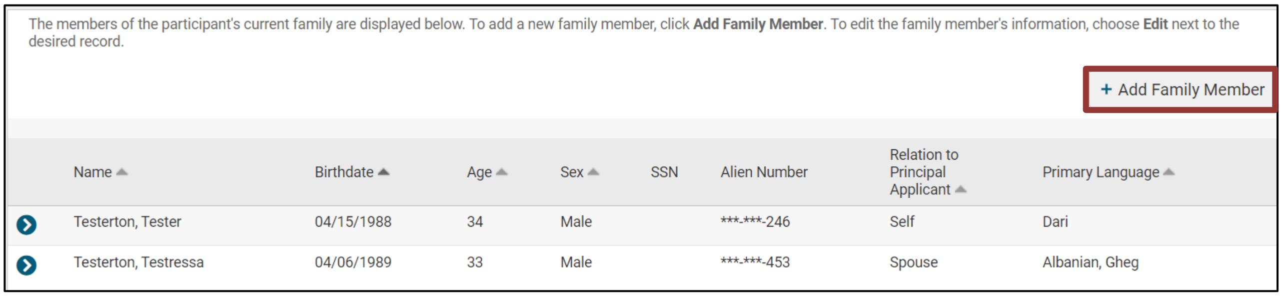
Edit a Participant: Participant Workspace > Participant Dashboard > Participant Information

Adding a Family Member

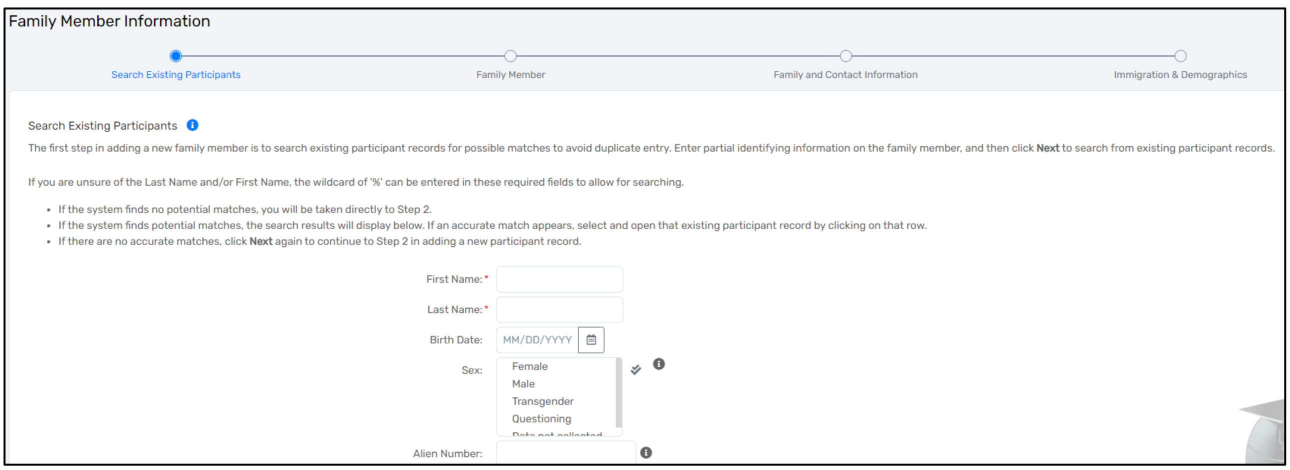
1. Navigate to the Participant workspace and select the Participant Information Menu Group, followed by the Family Members Menu Option.



2. After navigating to the Family Members menu option, find the “Add Family Member” button at the top right of the page, above the existing family members.



3. Enter the First Name, Last Name and Birth Date of the new family member. The system will alert users to potential matches. If there is a potential match, users may select that row which will open the existing participant record. If the system finds no potential matches, users will be taken to the next page.



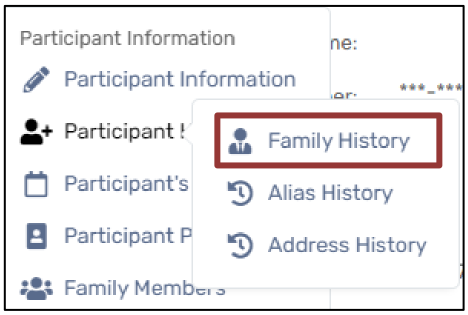
4. Add/update data fields on the Family and Contact Information and Immigration & Demographics pages.
5. Select Save in the lower right-hand corner. The User will return to the Family Members form.

Edit a Participant: Participant Workspace > Participant Dashboard > Participant Information

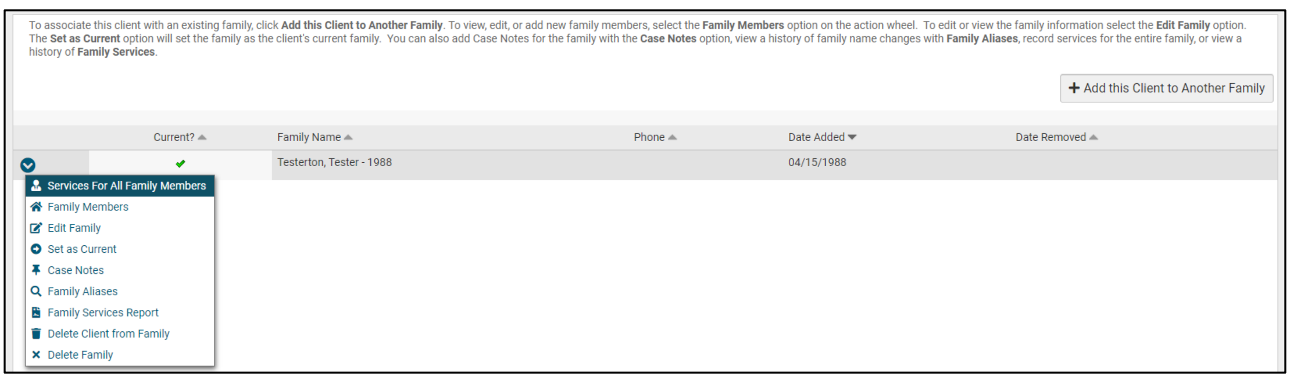
Family History

This functionality allows a User to view the selected participant's history of families they have been a part of. The Family History form also contains a button that allows the User to add the selected participant to another family.

1. From the Participant Dashboard, find Participant History in the Participant Information menu group and navigate to the Family History option.



2. Users will see a row for each historical value the family member has. There is also an action button for each row that will provide the user an array of options.



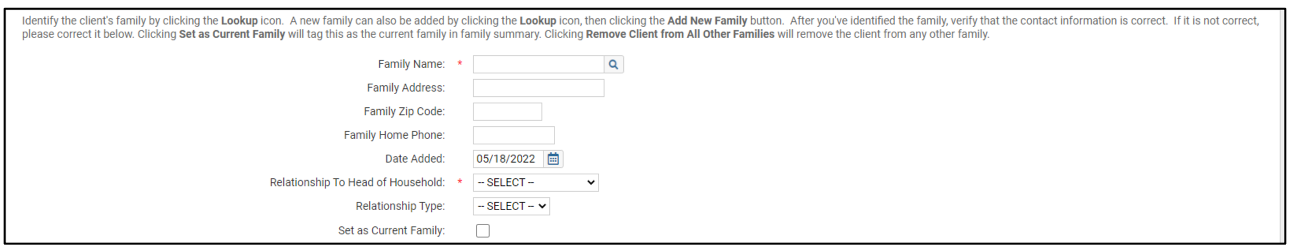
Family History: Participant Workspace > Participant Dashboard > Participant Information > Participant History > Family History

Adding a Participant to Another Family

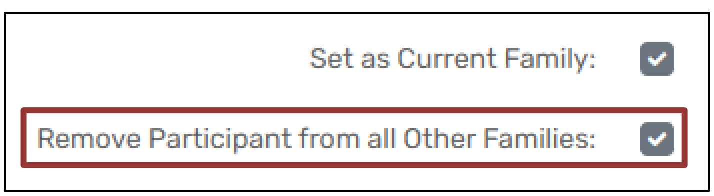
This functionality would be used when locating an individual who is entered separately, as their own family, but needs to be tied to an existing family.

1. From the Family History form, select Add this Participant to Another Household button, the user will be redirected to a data entry form.

2. Enter in the family name and select the Lookup icon (the magnifying glass to the right of the Family Name) and on the new form, find and select the household where the selected participant needs to be added.



3. Select the Relationship To Head of Household and, if applicable enter the Relationship Type and check the Set as Current Family.
4. Setting as Current Family will create this family as the primary family for the participant.
5. If you select Set as Current Family, you will see an additional question

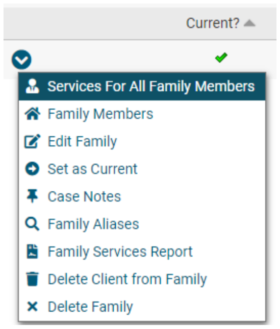


6. Removing the participant from all other families will remove the participant from any other family and integrate the participants' record into the new family.

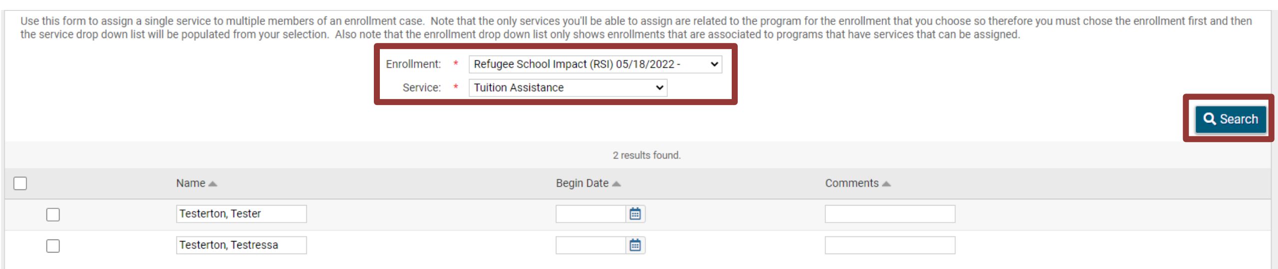
Adding a Participant to Another Family: Participant Workspace > Participant Dashboard > Participant Information > Participant History > Family History > Add this Participant to Another Family

Adding a Service for All Family Members

1. From the Family History form, select the Action Button to the left of the household that needs services added, followed by Services For All Family Members.



2. The user will be redirected to the Quick Services for All Family Members form.



3. Choose the Enrollment first, followed by the desired Service.
4. Select Search to the right. This will search the selected enrollment for other enrolled Family Members.
5. Users may select the Family Members to apply the service to, enter the date and any comments.
6. Select Save & Close button, the user will be redirected to previous menu option.

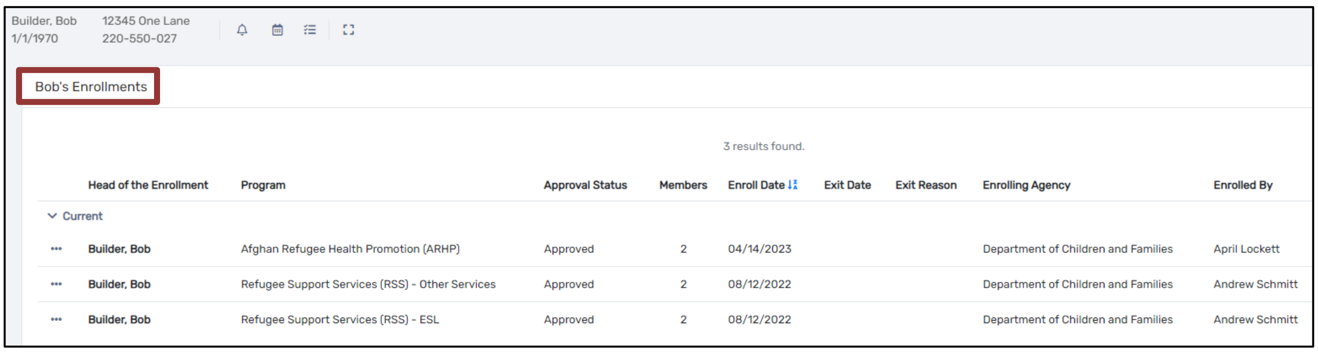
Adding a Service for All Family Members: Participant Workspace > Participant Dashboard > Participant Information > Participant History > Family History > Action Button > Services for All Family Members

Completing an Enrollment

The Enrollment functionality allows for a user to enroll and associate a participant and family members to a specific program. A participant may have multiple enrollments over time where they may receive services and referrals.

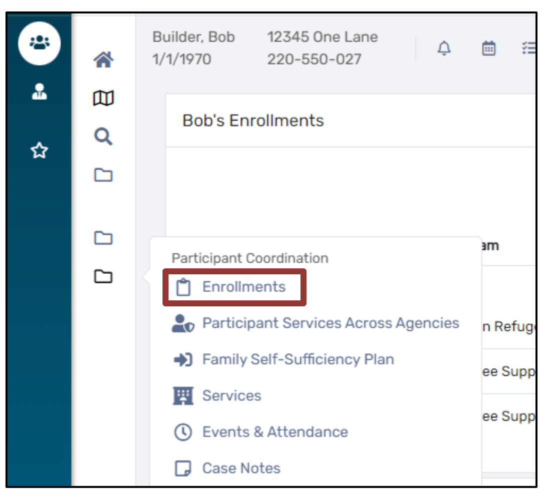
View Enrollments

1. Navigate to the Participant workspace and bring the correct participant into focus.
2. Enrollments can be viewed in two different ways:



a) First, users may navigate to the Participant Dashboard, locate the Participants' Enrollments and Click on the Participant's Enrollments header.

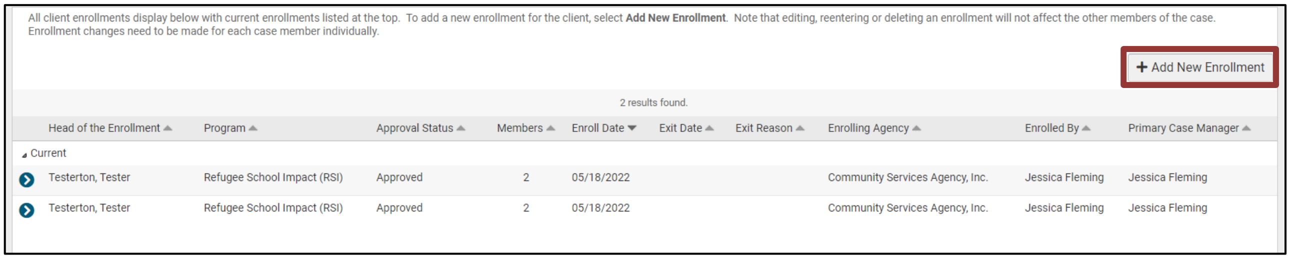
b) Second, users may navigate to the Participant Coordination menu group and select the Enrollments menu option.



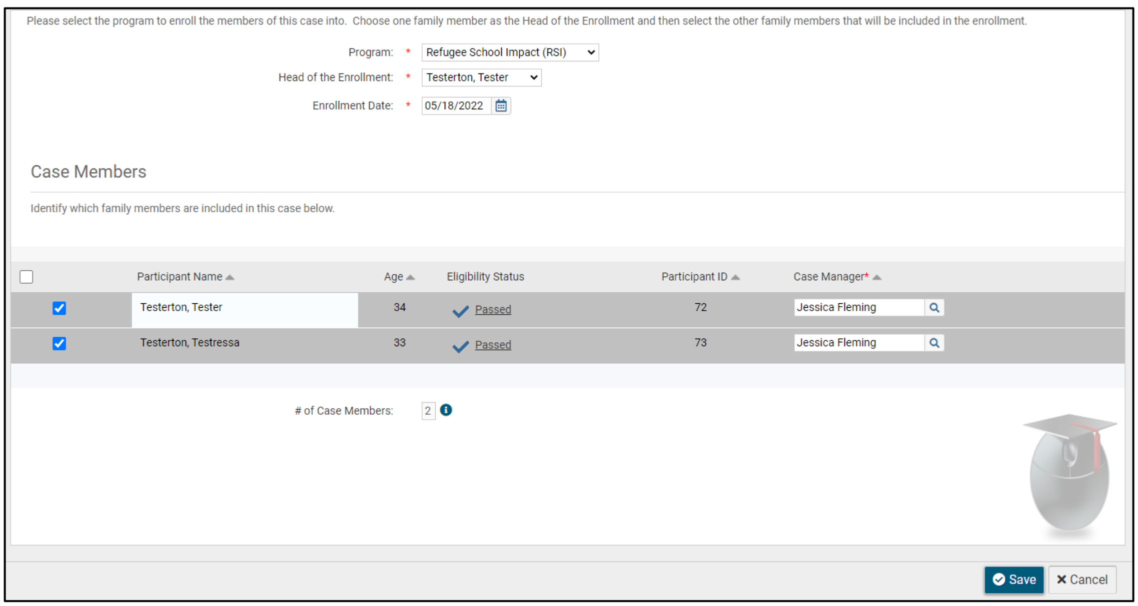
3. Both options will direct users to the Enrollments history form where users can View, Edit, or Add a New Enrollment.

Completing an Enrollment via Enrollments

1. After navigating to the Enrollments form, the user will see a row representing each of the participants' previous and current enrollments.
2. Select Add New Enrollment.



3. The user will be redirected to the Program Enrollment page.



4. From the Program Enrollment form, users should select the Program, Head of the Enrollment, Enrollment Date and the Family Members that should be included in the enrollment.
    a. When the program is selected, the user should see the eligibility status in the Case Member table will update based on the participants eligibility for each family member.
5. Select Save and the user will be redirected back to the Participant Dashboard and the participants Enrollments should now be visible.

Completing an Enrollment: Participant Workspace > Participant Coordination > Enrollments > Add a New Enrollment

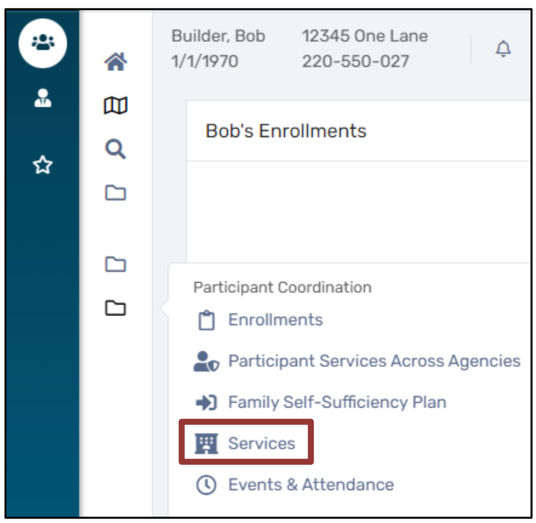
Services

Services functionality allows for a user to record services that were provided to the participant during their participation with the program. There are three types of services available to enter: Services, RSI Services, and RYM Services.

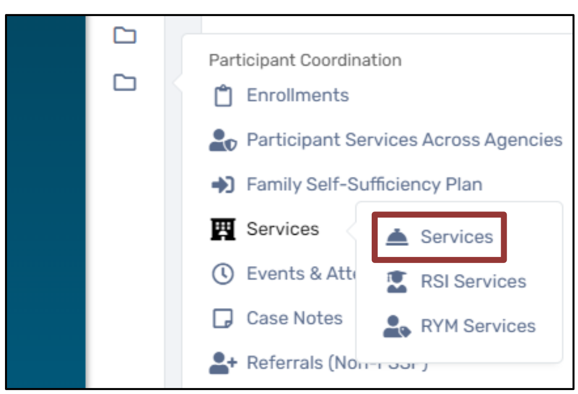
Services is the general category of services available to a user.
RSI Services are the services associated with the Refugee School Impact (RSI) program.
RYM Services are the services associated with the Refugee Youth Mentoring (RYM) program.

Entering a Service

1. Navigate to the Participant workspace, find the Participant Coordination menu group, and select the Services menu option.

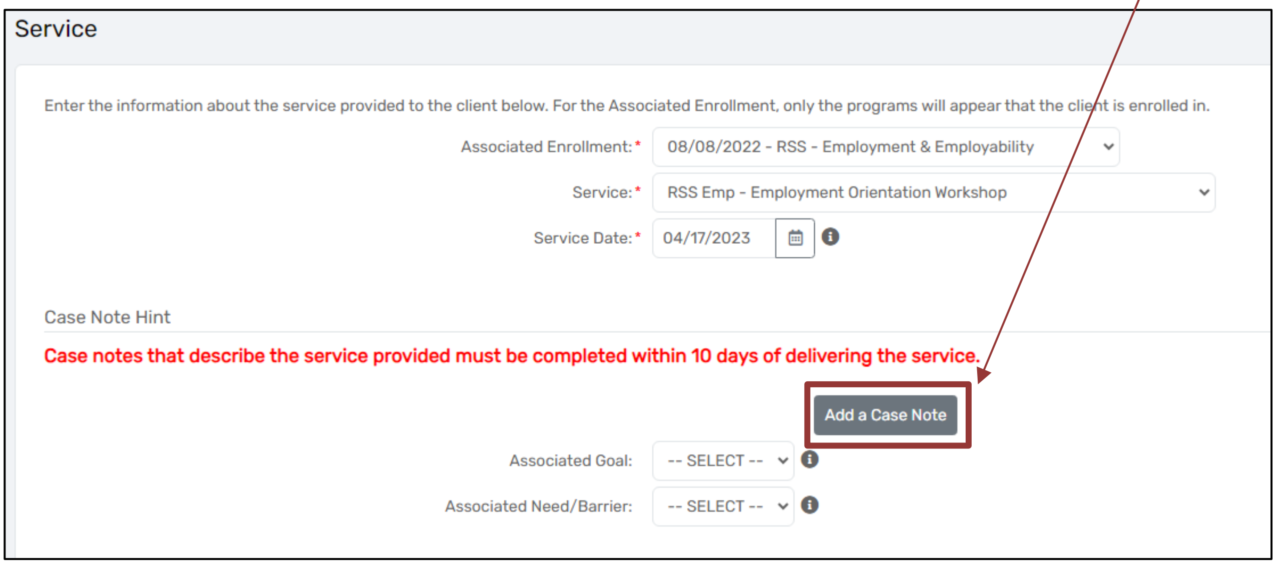


2. Select the type of service to add.

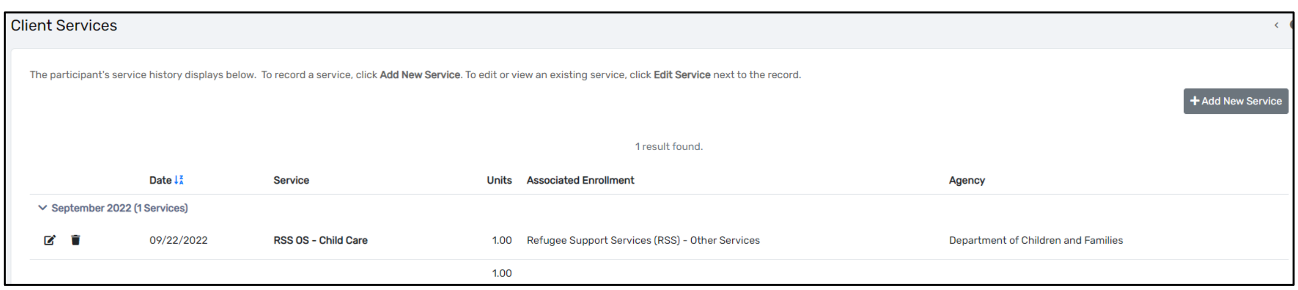


Add New Service (Services Option on Services Menu)

1. Select Add New Service in the right-hand corner to proceed.
2. Users are required to select an Associated Enrollment and Service from the drop-down lists. If no Associated Enrollment is listed, one will need to be added prior to saving the service.
3. If applicable, select the corresponding Associated Goal and Associated Need/Barrier from the drop-down lists. As with the Enrollment list, missing Barriers and Goals will need to be added prior to saving the service.
4. It is required to add a case note within 10 days of delivering the service. Click on the button "Add a Case Note" which opens the standard Case Notes form.



5. Select Save.
6. Once the service has been entered, it will display on the Services form, where additional options may be available.

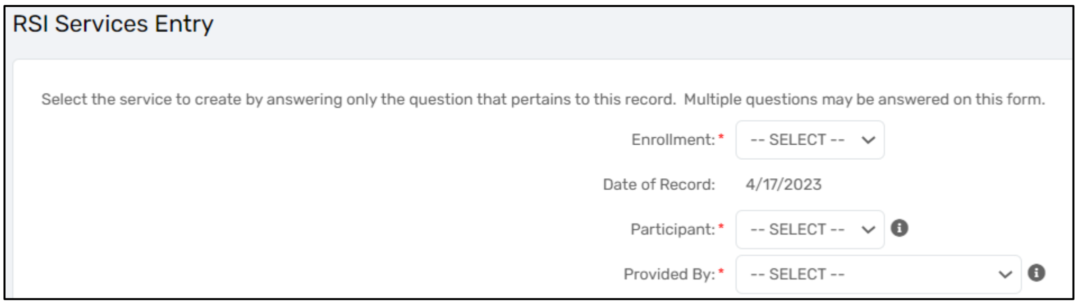


Entering Services: Participant Workspace > Participant Coordination > Services > Services

Add RSI Services (Refugee Services Impact)

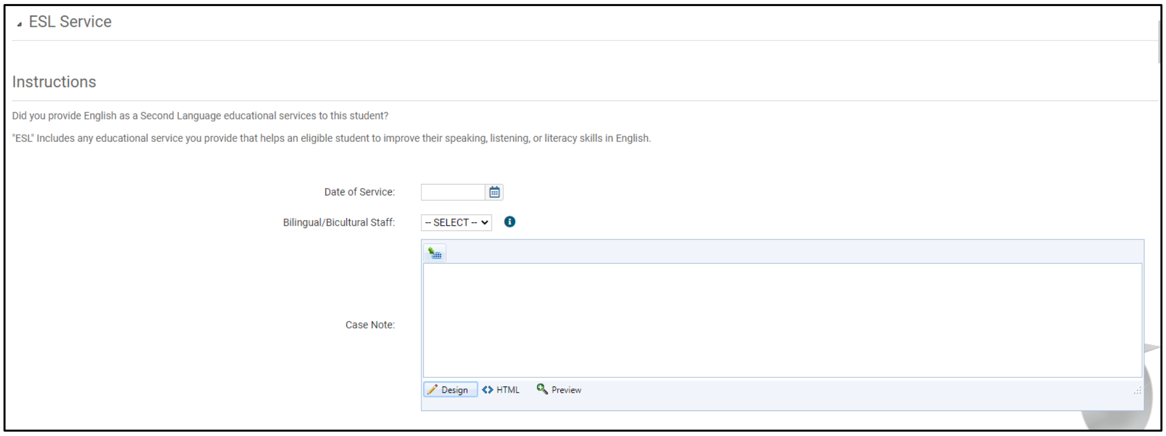
1. Select Add New in the right-hand corner to proceed.

2. Users are required to select a corresponding Enrollment from the drop-down list. If no Enrollment is listed, one will need to be added prior to saving the service.



3. Select the appropriate Participant and Provided By values.
4. Users will then see several service offerings outlined on the page. They include:
   - Orientation
   - ESL Service
   - After School Program
   - Tutoring Services
   - Summer School programs
   - Utilized Specialized Materials
   - Utilized Specialized Technology
   - Interpretation
   - Transportation
   - Engagement with Peers
   - Grade Promotion
   - Other Approved COVID-19 Services
5. Each service offering can be expanded by selecting the arrow the left of the service name, or the service name itself.

6. Once expanded, each service will contain instructions for that service and the fields can be filled out as appropriate. All service offerings will have Date of Service, Bilingual/Bicultural Staff and Case Notes available to record answers. Additional fields may be available depending on the service offering.



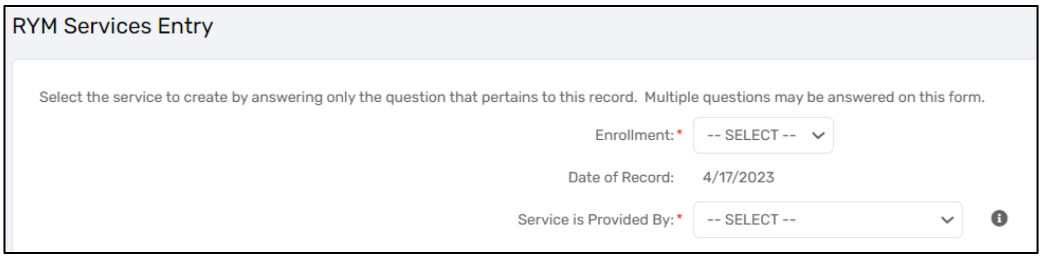
7. Select Save.
8. Once the RSI service has been entered, it will display on the Services form, where additional options to View or Edit are available.

Entering Services: Participant Workspace > Participant Coordination > Services > RSI Services

Add RYM Services (Refugee Youth Mentoring)

1. Select Add New in the right-hand corner to proceed.

2. Users are required to select a corresponding Enrollment from the drop-down list. If no Enrollment is listed, one will need to be added prior to saving the service.

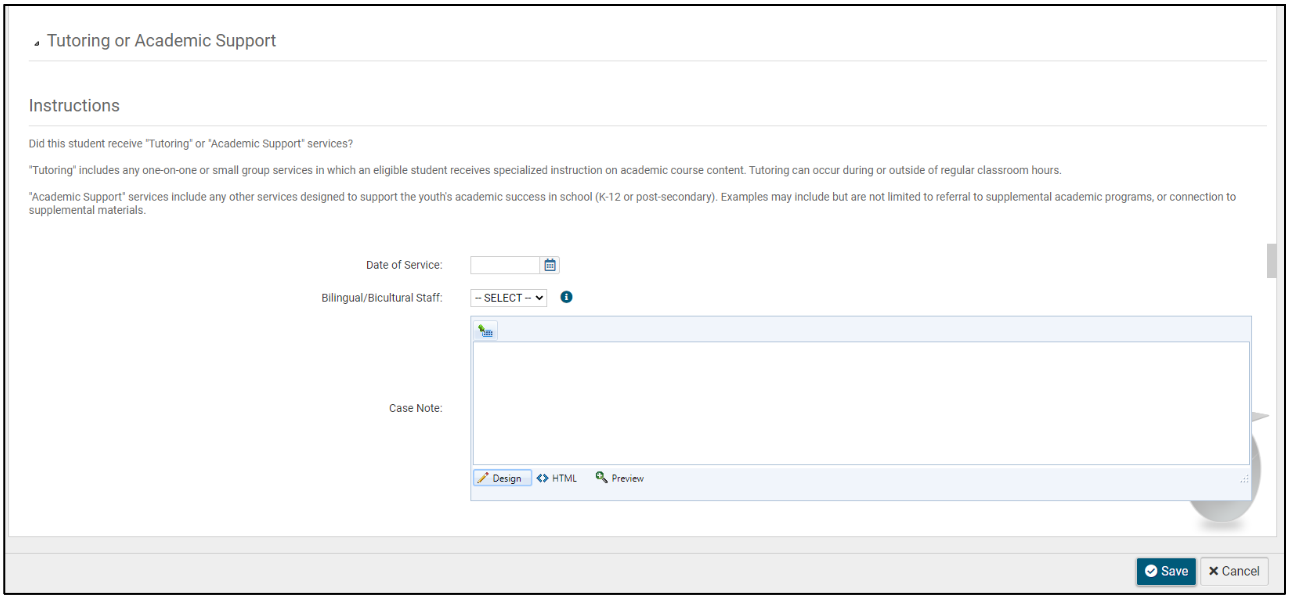


3. Select the appropriate Service is Provided By value.

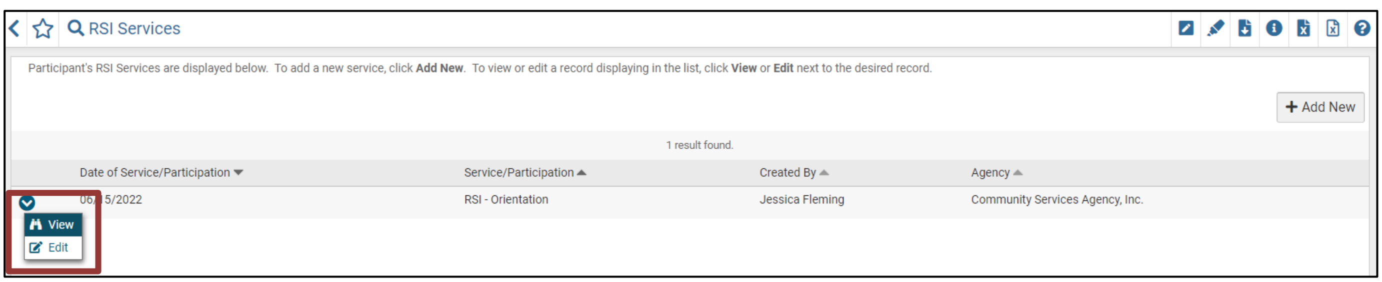
4. Users will then see several service offerings outlined on the form. They include:
    - Orientation
    - Assessment/Plan Completed
    - Milestone Achieved
    - Goal Achieved
    - Social and Life Skills
    - Cultural Exploration
    - Engagement with Peers
    - Tutoring or Academic Support
    - Career Development
    - Health and Wellness Literacy
    - Financial Literacy
    - Civic Engagement
    - Meeting with Mentor
    - Received Incentive
    - Other Approved COVID-19 Services

5. Each service offering can be expanded by selecting the arrow the left of the service name, or the service name itself.

6. Once expanded, each service will contain instructions for that service and the fields can be filled out as appropriate. All service offerings will have varying fields available to record answers. Most service offerings will have Date of Service, Bilingual/Bicultural Staff and Case Notes as available fields.



7. Select Save.
8. Once the RYM service has been entered, it will display on the Services form, where additional options to View or Edit are available.



Entering Services: Participant Workspace > Participant Coordination > Services > RYM Services

View a Service

1. Select the View option from the action button on the row of the service the user would like to view.
2. Selecting View direct the user to a read only version of the entered service. No edits can be made with this option.

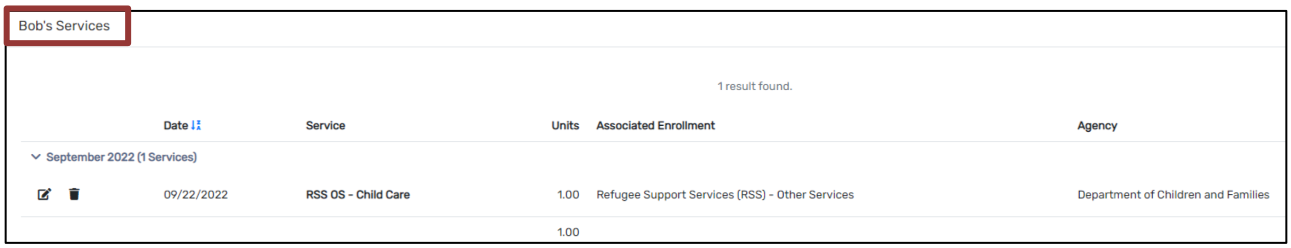
Edit a Service

1. Select the Edit option from the action button on the row of the service the user would like to edit.
2. Selecting Edit will direct the user to the appropriate Service where appropriate information may be updated or changed.
3. Select Save.
4. The updated information will reflect on the appropriate Services form.

Participant Services

Services can be viewed and edited in various places in the system.

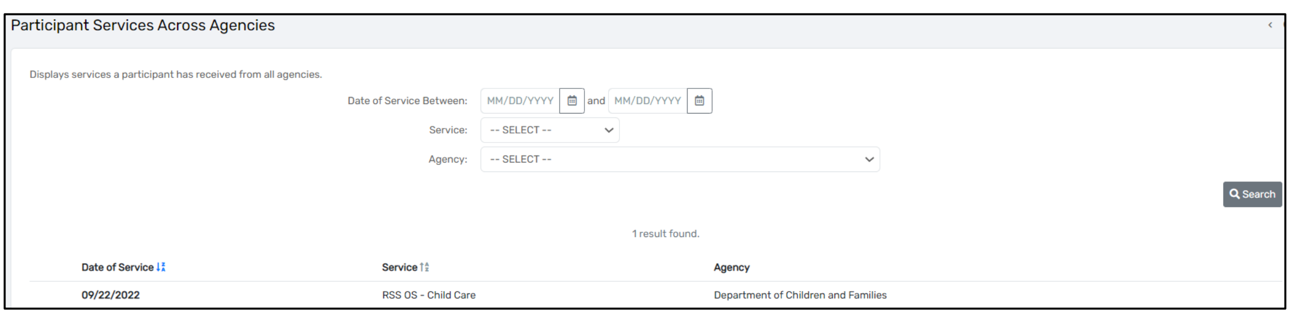
1. Participant Dashboard:
    a. In the Participant workspace, locate bring the participant into focus and navigate to the Participant Dashboard.
    b. Services that have been entered for the participant, regardless of type, will display in the Services section of the dashboard.
    c. Users can also select the Participant Services header where they will be redirected to the Services history form.



2. Services History Form

    a. Depending on the type of service, users can also view the existing services by navigating to the Participants workspace, the Participant Coordination menu group and the appropriate Service from the Services menu option.
    b. Selecting from Services, RSI or RYM services will direct the user to the Services history form.

3. Participant Services Across Agencies
    a. With the appropriate participant in focus, navigate to the Participant Coordination menu group and select Participant Services Across Agencies.
    b. Security Organization determines which services are available to be seen.
    c. Users will be able to search for services, by Service type, and/or Agency, provided to the participant.

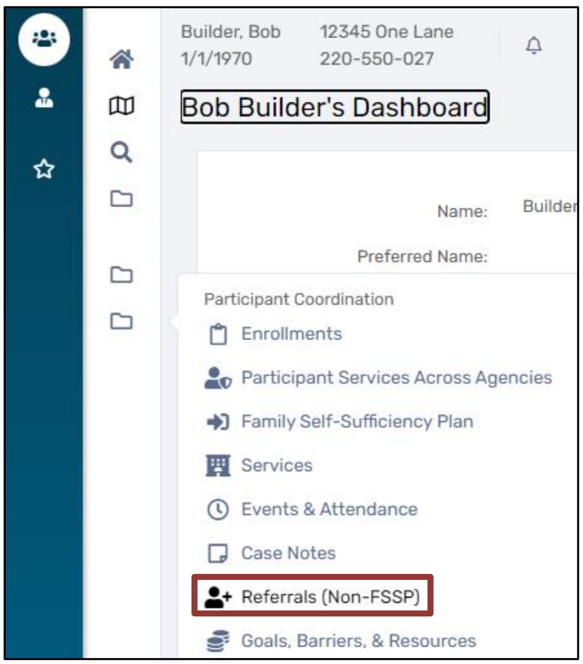


Referrals

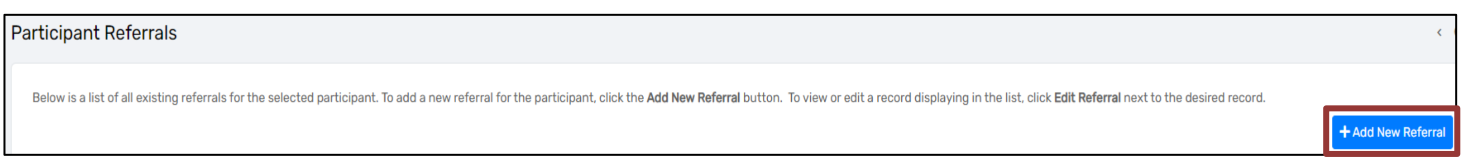
Referrals allows for a user to record referrals that were made to or received from a provider during the participants participation with the program.

Recording a Referral

1. Navigate to the Participant workspace, find the Participant Coordination menu group, and select the Referrals (Non-FSSP) Menu Option.

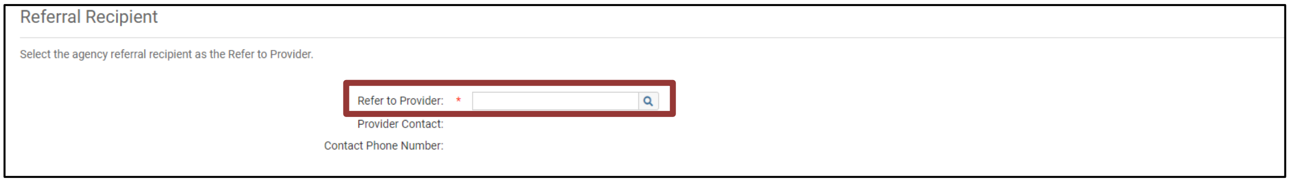


2. Select Add New Referral in the right-hand corner to proceed.

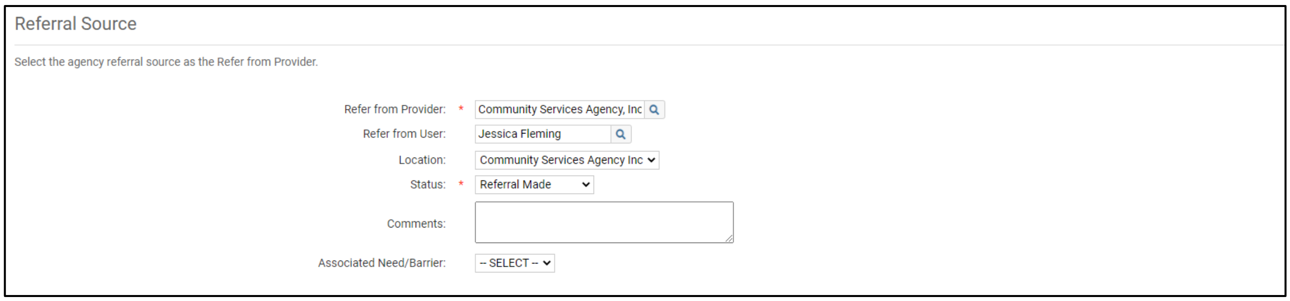


3. Users are required to select a Referral Date and Referral Service to proceed because the following section is dependent on the type of Referral Service.

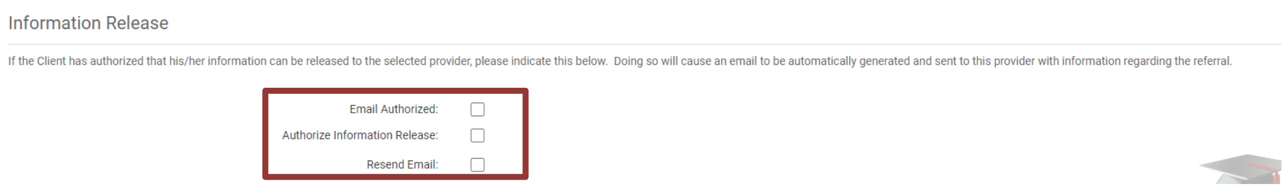
4. Use the search function via the magnifying glass to locate the appropriate Provider. This list will be tailored to only providers who offer the Referral Service selected above.



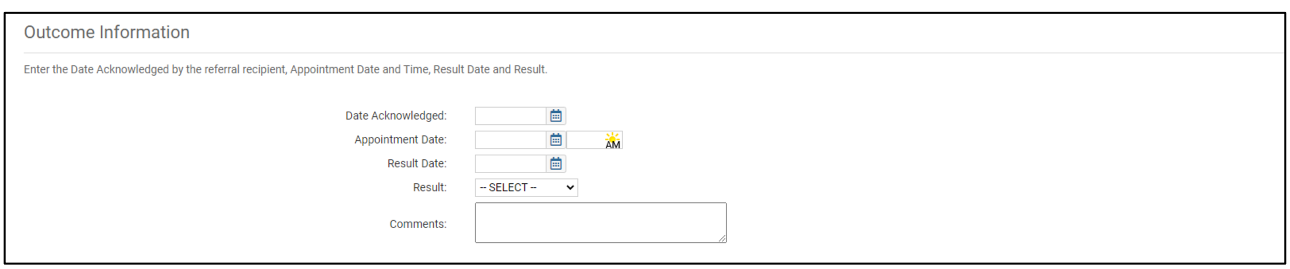
5. The Referral Source section will automatically fill in information from the user and the associated provider agency. The user may then adjust the Status, leave a Comment and if applicable, add an Associated Need/Barrier.



6. The final section is available for the user to select if the Participant has authorized that his/her information can be released to the selected provider by selecting one or all of the check boxes.

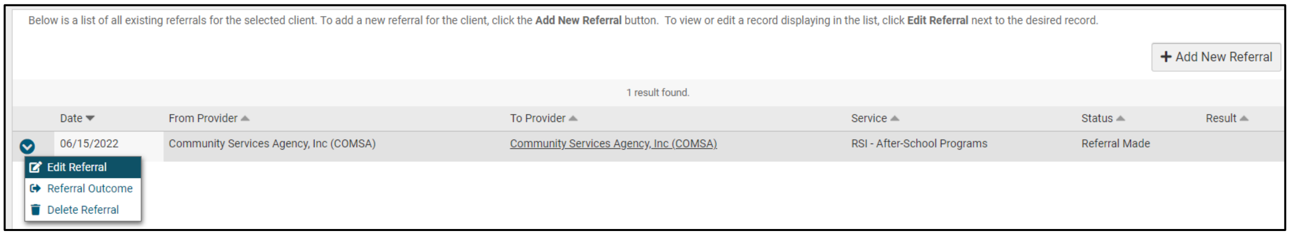


7. Select Next to navigate to the Referral Outcome section.



8. If the referral has an outcome at that point, the user may record the fields available on the Referral Outcome section. If the referral does not yet have an outcome, the user may select Finish and return to add the outcome at a later time.

9. Once the referral has been entered, it will display on the Participant Referrals form, where additional options may be available.



10. From the Participant Referrals form, the action button the left of the referral will have three options: Edit Referral, Referral Outcome, and Delete Referral.

Adding a Referral Outcome

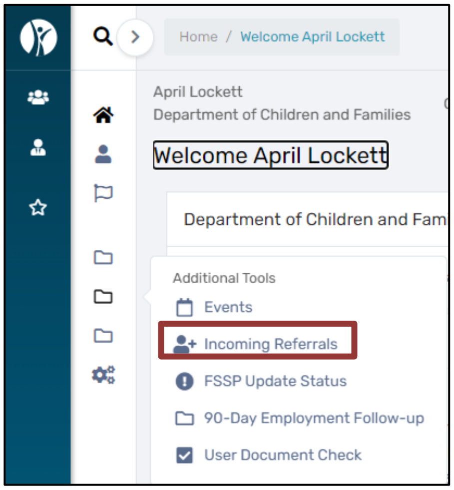
1. To add a referral outcome for a referral that does not have an outcome, select the Referral Outcome option from the action button.
2. The user will be directed to the second page of the Referral form to enter the appropriate information.
3. Once the Referral Outcome is entered, select Finish.
4. The updated information will now reflect on the Participant Referral form.

Editing a Referral

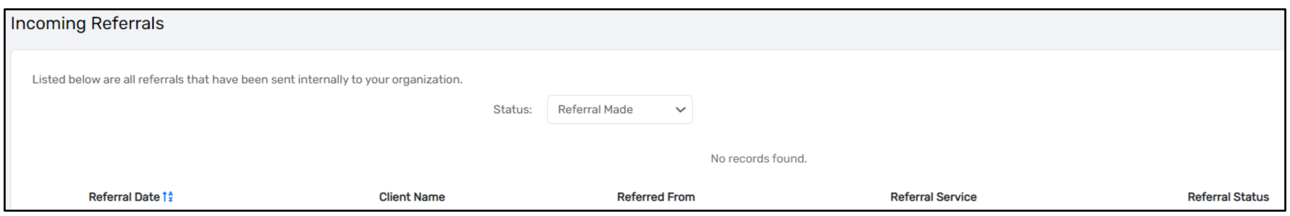
1. To make edits to a referral, select the Edit Referral option from the action button.
2. The user will then be directed to the Referral form where they may update any of the information to be correct.
3. Once the Referral and/or Referral Outcome information is updated, select Finish.
4. The updated information will now reflect on the Participant Referral form.

Incoming Referrals

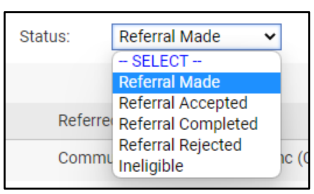
1. Navigate to the Home workspace, find the Additional Tools menu group, and select the Incoming Referrals Menu Option.



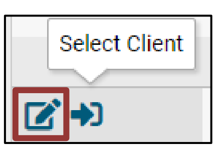
2. The Incoming Referrals form will display all incoming referrals that have been sent to the organization you are logged in as.



3. Users can filter the results based on the current Status of the referral.

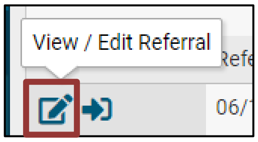


4. Once the correct set of referrals is in focus, the user should locate the correct participant and select one of the two action buttons to the left.
   a. Selecting the Select Client button will redirect the user to the Participant Dashboard in the Participant Workspace.

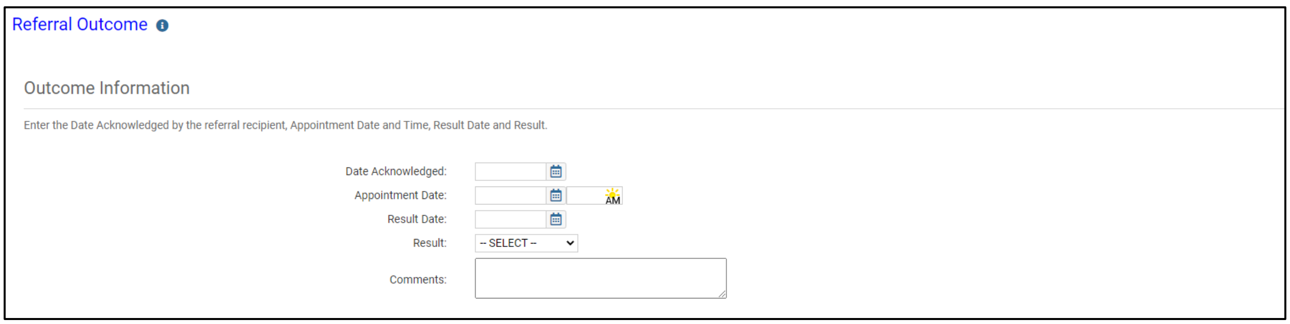


b. Selecting View / Edit Referral will open the referral details that outline the details of the referral that was made.

i. From the Referral form, the user may edit the Referral Status, add Comments, and enter the Referral Outcome information.



5. The Referral Source section will automatically fill in information from the user and the associated provider agency. The user may then adjust the Status, leave a Comment and if applicable, add an Associated Need/Barrier.



6. If the referral has an outcome at that point, the user may record the fields available on the Referral Outcome section. If the referral does not yet have an outcome, the user may select Finish and return to add the outcome at a later time.

Recording Referrals: Home Workspace > Additional Tools > Incoming Referrals