WRPD/ClientTrack

User Manual

WI Refugee Programs Database (WRPD)/ClientTrack

Division of Family and Economic Security

Bureau of Refugee Programs

October 2024

Wisconsin Department of Children and Families

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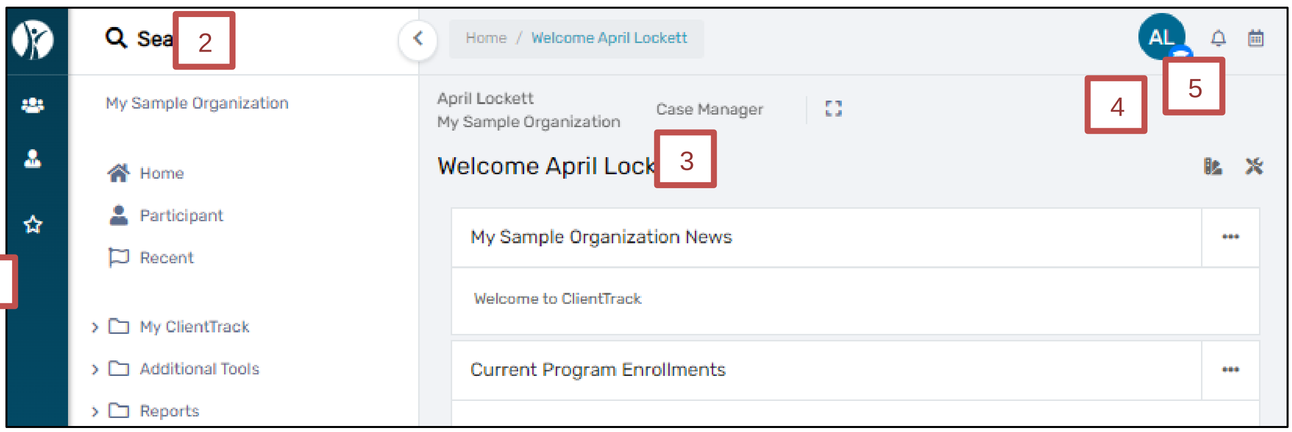
Navigation

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.

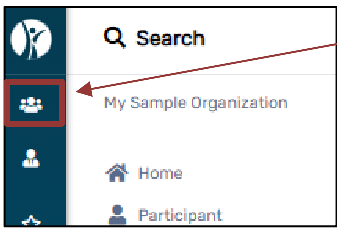
5. **Notifications**
   You'll be alerted to new notifications here.

Find Participant

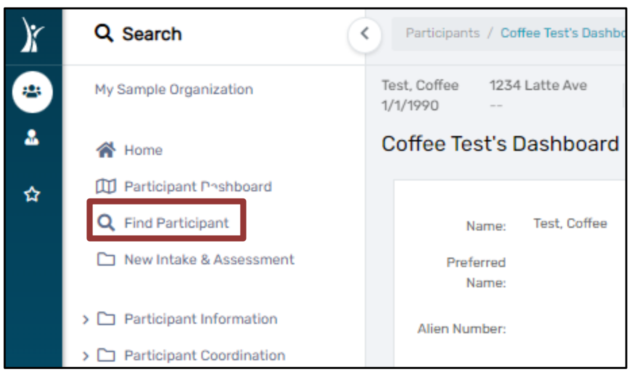
This functionality allows a ClientTrack user to search for and select participants that the user has access to according to the security model implemented for the organization.

Finding a Participant

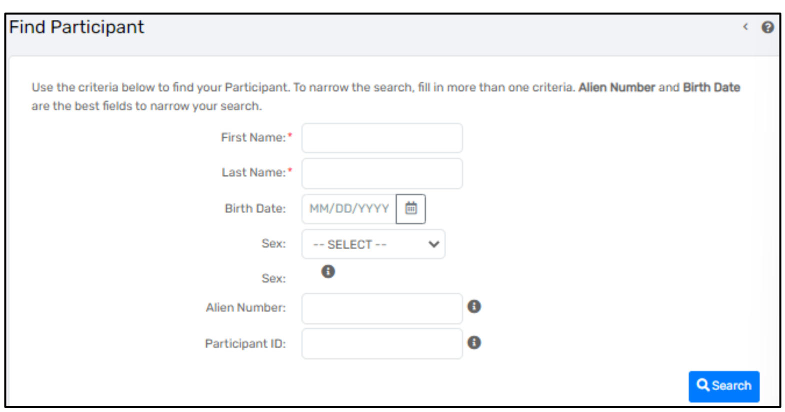
1. From the Main menu, you will click the icon for the Participants workspace.



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.

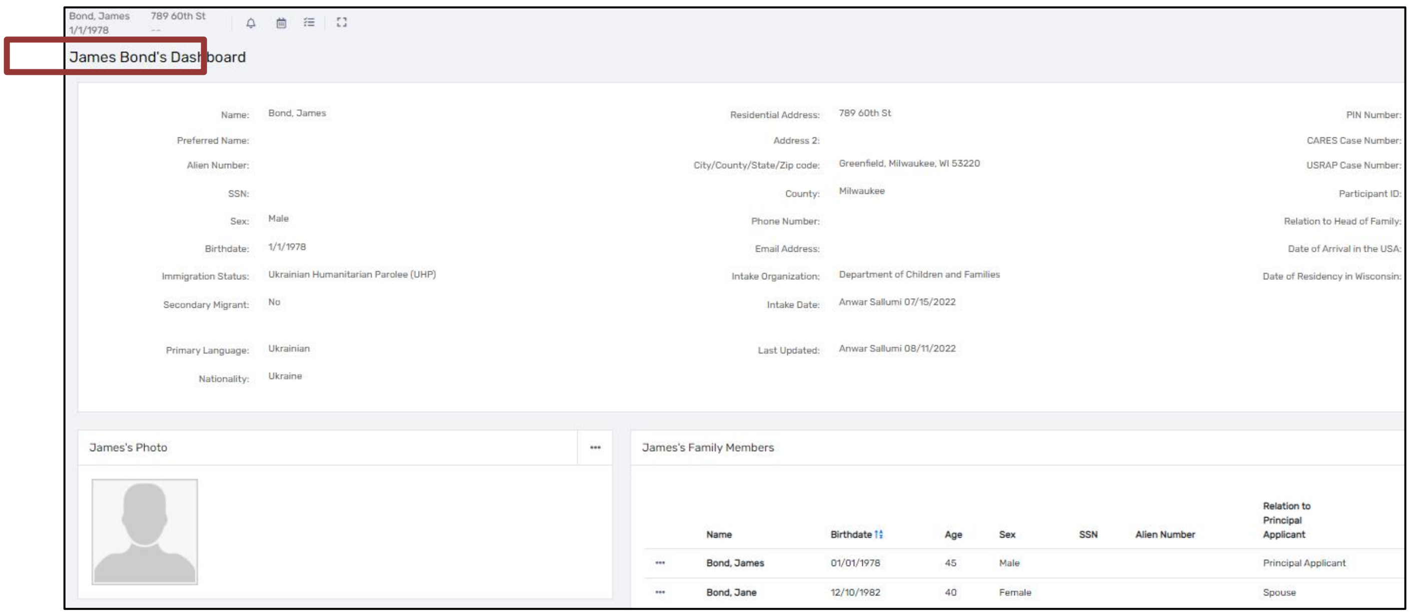
3 results found.

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.



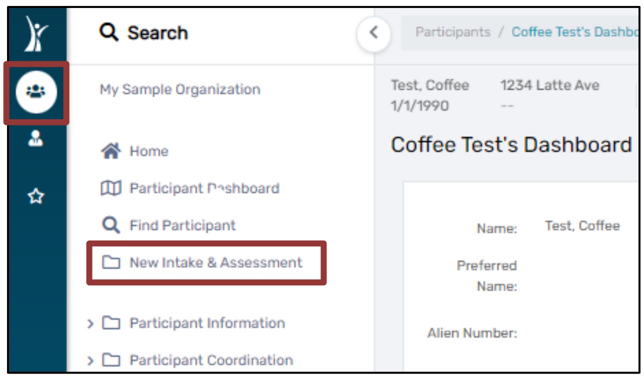
Find a Participant: *Participant Workspace > Find a Participant > Participant Dashboard*

Completing an Intake

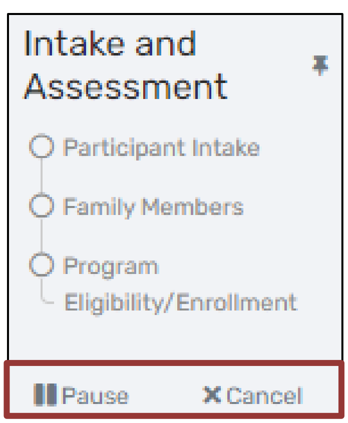
Intake functionality allows for a User to identify and add new participants to the system. An intake ensures that participants are input into the system so that demographics, enrollments, services and referrals can be attributed to the participant.

Intake & Assessment Workflow

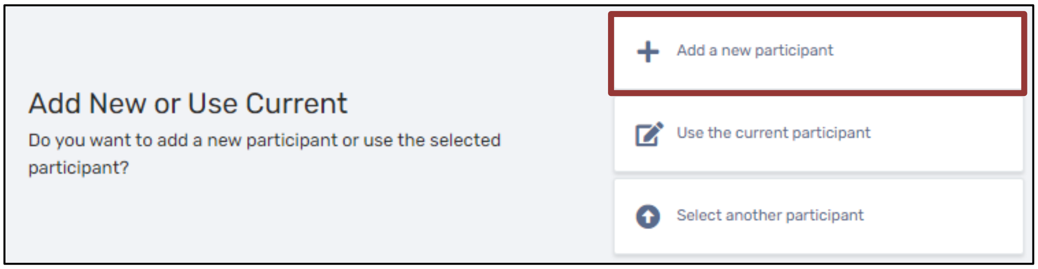
1. Navigate to the Participant workspace and select the New Intake & Assessment Menu Option.



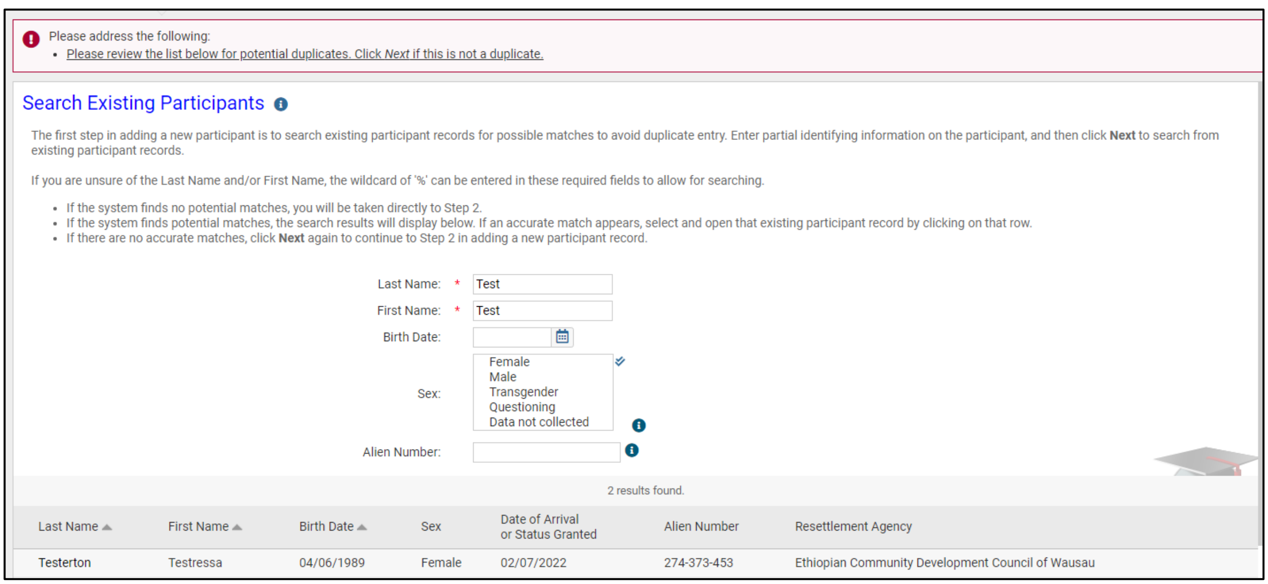
2. Users should now see the Intake & Assessment Workflow. There are two options beneath the workflow that will be available to users.
    a. The first button is a pause button. The pause button will allow the user to pause the workflow, save the progress made, and return later.
    b. The second button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



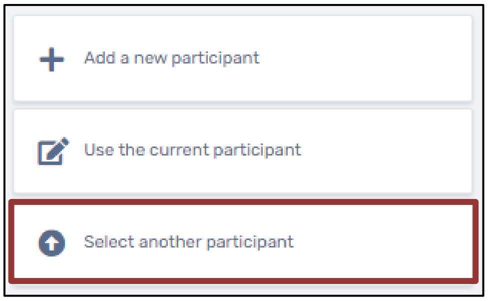
3. Users will see three options for selecting a participant under the Add New or Use Current section: Add a new participant, Use the current participant, and Select another participant



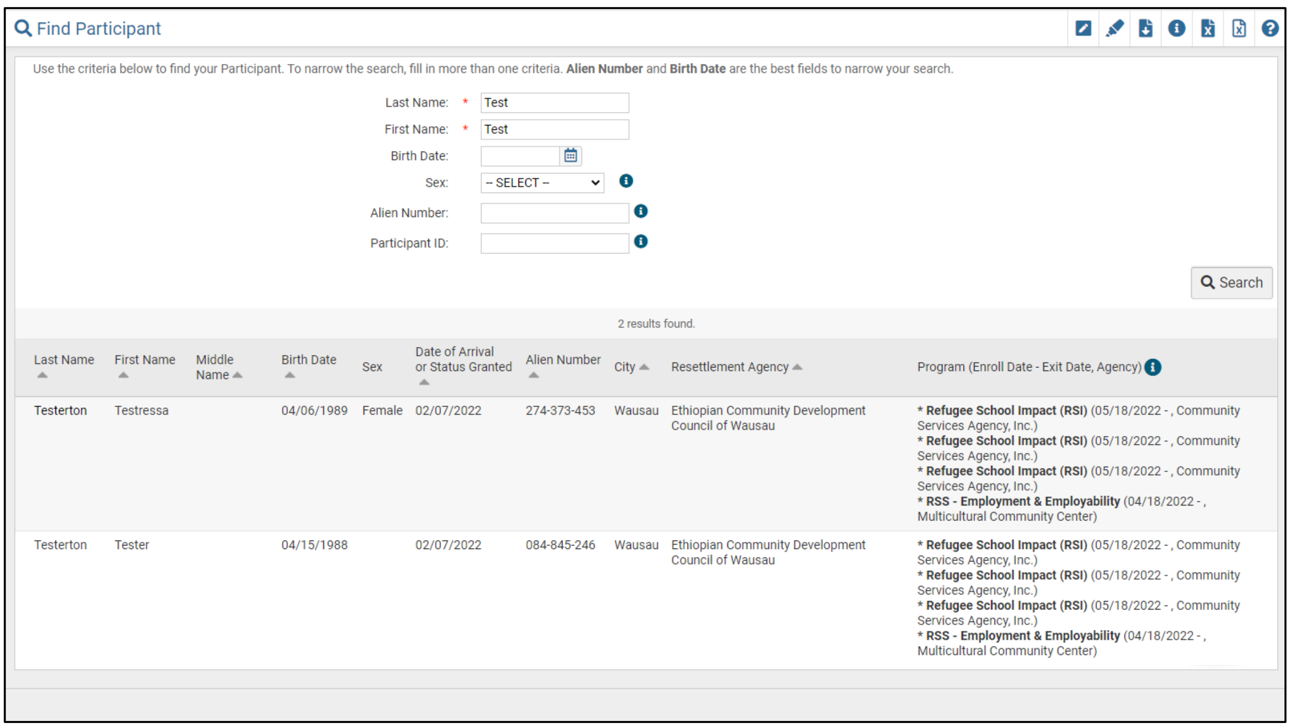
4. Selecting the Add a new participant will allow the user to enter a brand-new participant to the system.
    a. Users will be redirected to the Search Existing Participants page to search participants on Last Name, First Name, Birthdate, Sex, and/or Alien Number. After selecting Next, the system will 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.



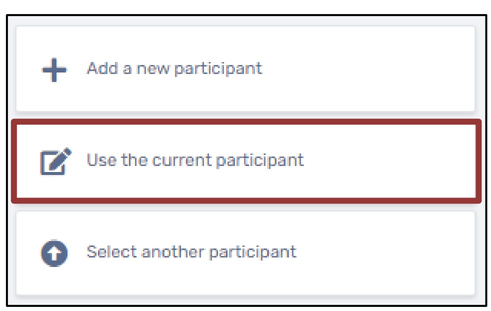
5. Selecting Select another participant will redirect the user to the Find Participant search form to search for the existing participant and link to their current record.



   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.

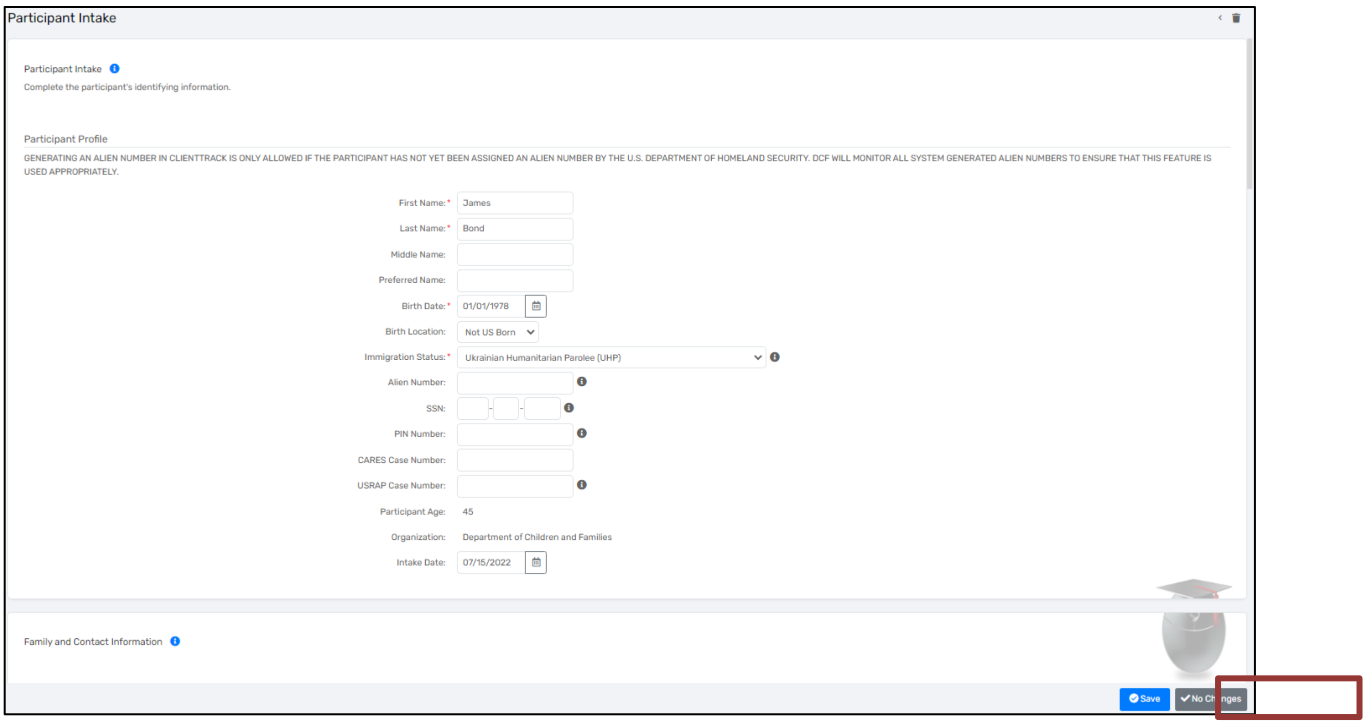


6. Selecting Use the current participant will take the user to the Participant Intake form.



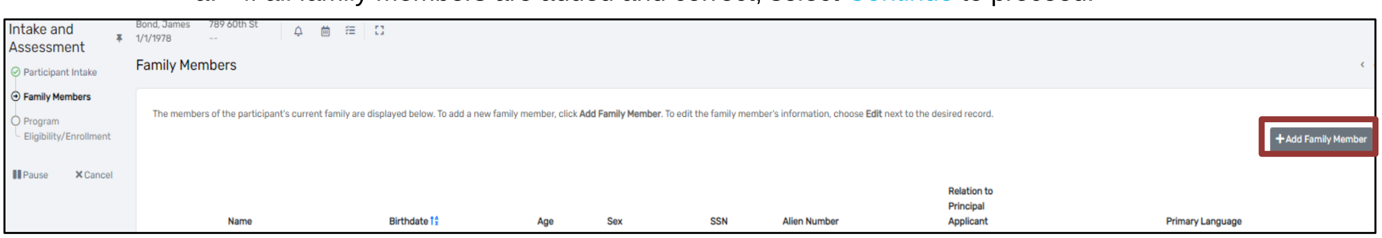
Participant Intake Form

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.



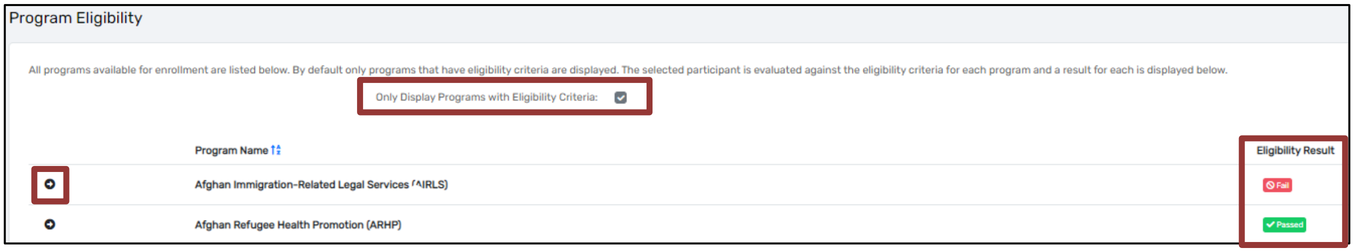
Family Members

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

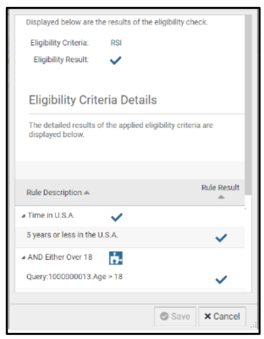
9. The user will be directed to Program Eligibility/Enrollment section of the Intake & Assessment Workflow. This form will display programs that are available to enroll the participant into.



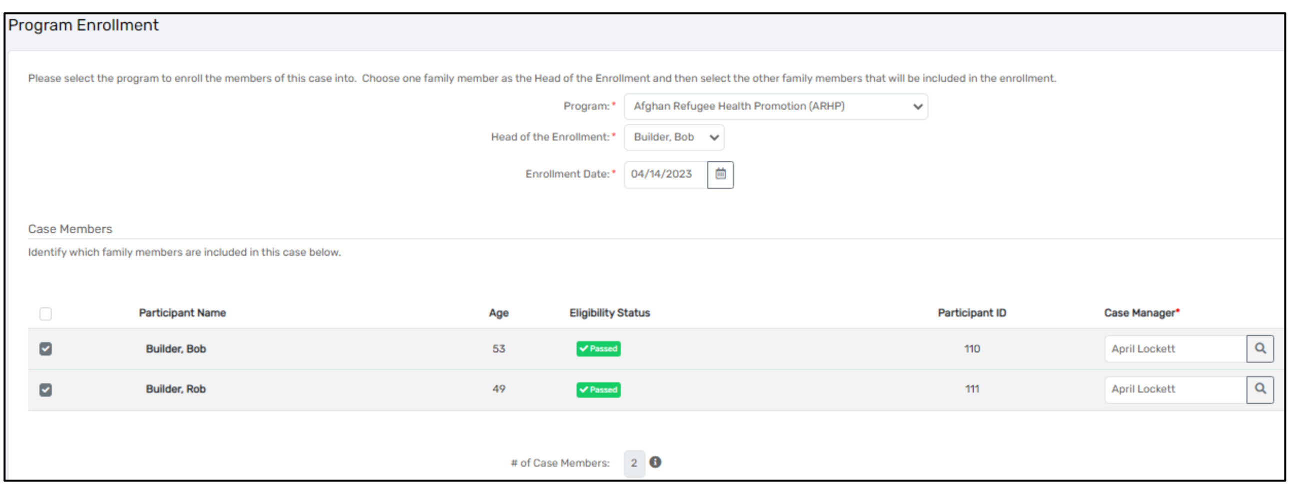
   a. The programs that have eligibility criteria will display as separate rows on the form. Each program should have an Eligibility Result available based on the information entered on the previous forms of the Intake & Assessment Workflow

   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.



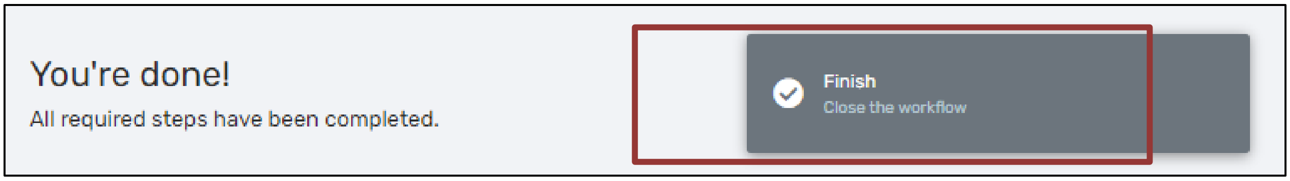
10. If the participant should be enrolled into one of the programs, the user may select the Arrow in the row of the program the participant should be enrolled into.
    a. The user will be redirected to the Program Enrollment form. Here, the user will be prompted to select the Head of the Enrollment, 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

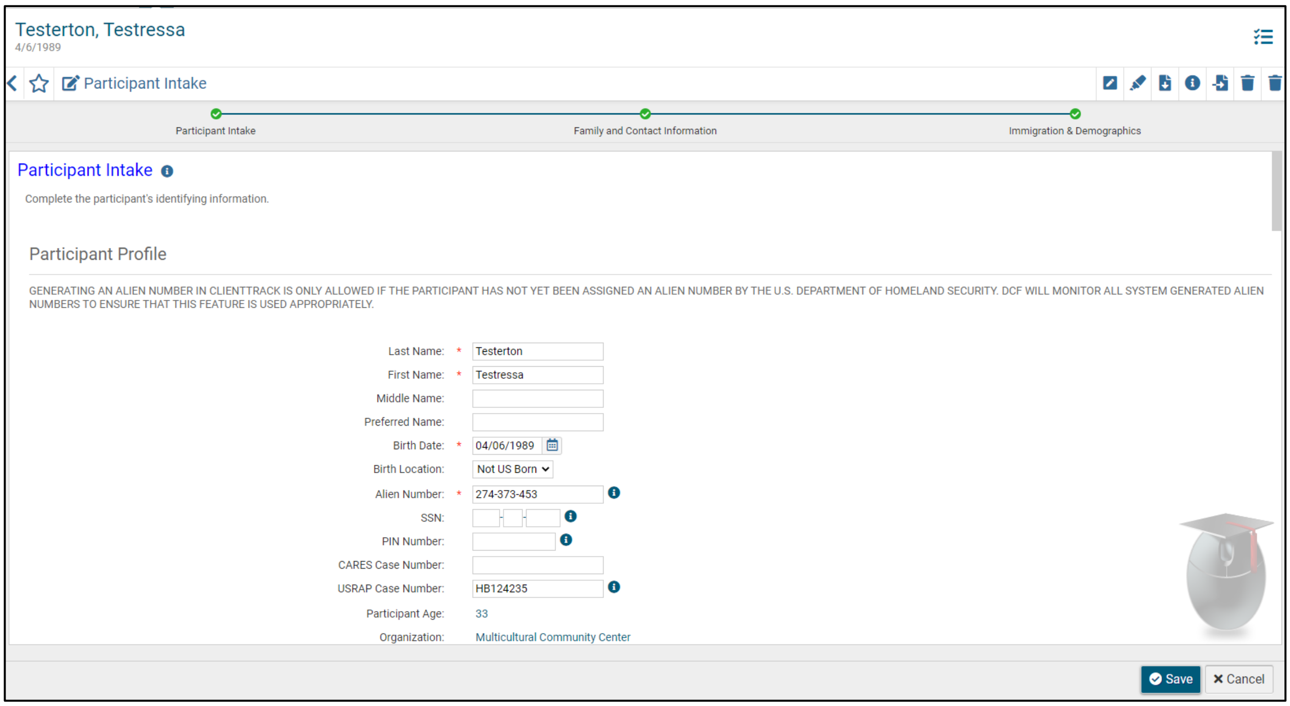
12. If the participant should not be enrolled into one of the programs, the user may select Next to complete the Intake and Assessment Workflow without enrolling the participant.
    a. The user should see the Intake and Assessment workflow have green checkmarks next to all the completed steps. The user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

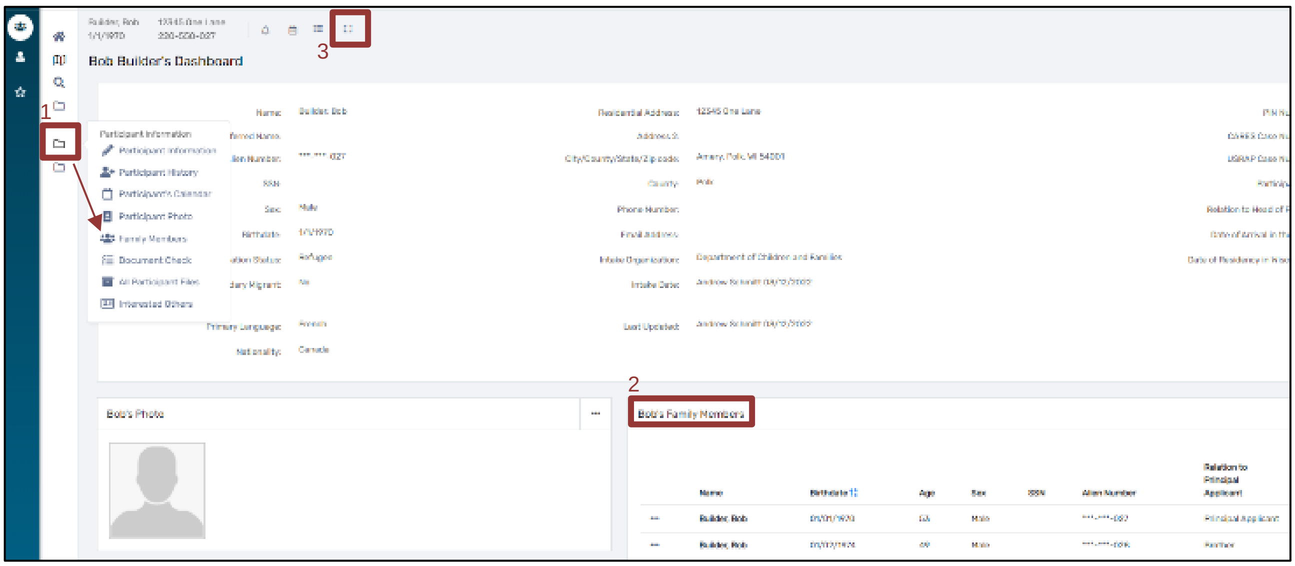
Participant Intake Record: *Participant Workspace > Participant Dashboard > Participant Information*

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.

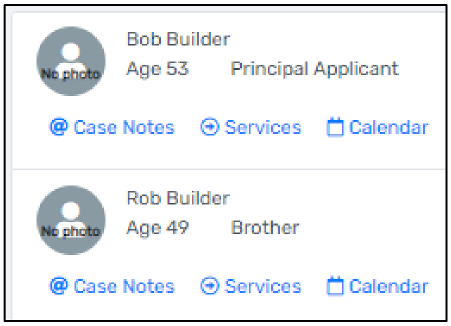
Option 2:

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:

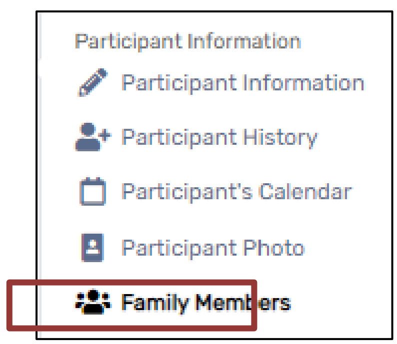
1. Navigate to the Participant workspace and select the Expand button on the Client's dashboard to the right of the participants name at the top left of the screen.
2. This will display each member of the Family and allow the user to select the name of each participant to be redirected to their Participant 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.

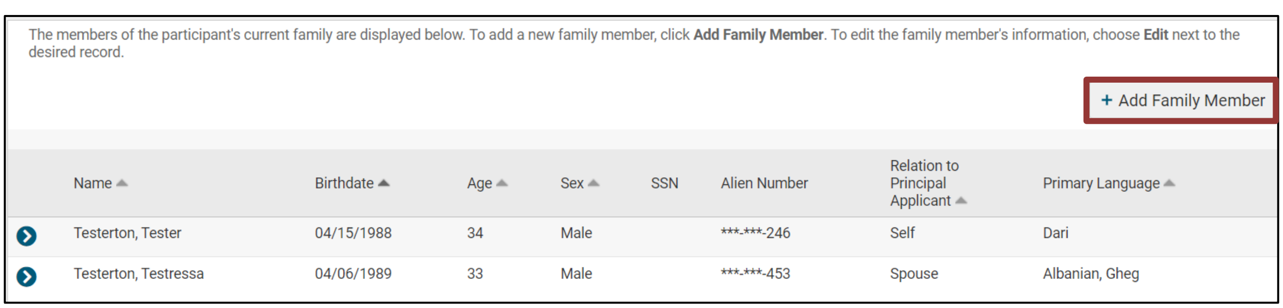


Adding a Family Member

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

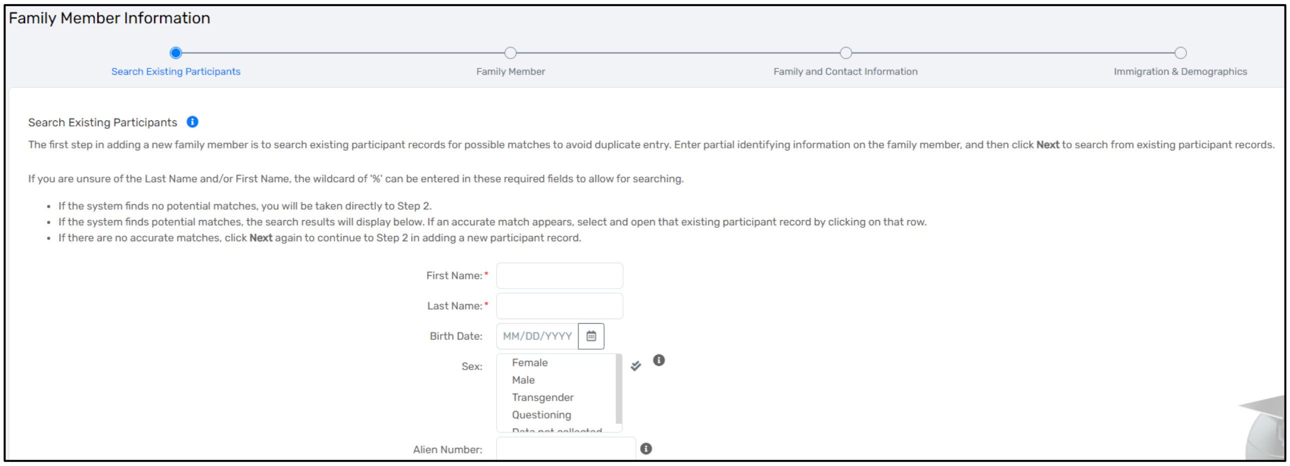


2. After navigating to the Family Members menu option, find the "Add Family Member" button at the top right of the page, above the existing family members.



	Name	Birthdate	Age	Sex	SSN	Alien Number	Relation to Principal Applicant	Primary Language
	Testerton, Tester	04/15/1988	34	Male		***-***-246	Self	Dari
	Testerton, Testressa	04/06/1989	33	Male		***-***-453	Spouse	Albanian, Gheg

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.

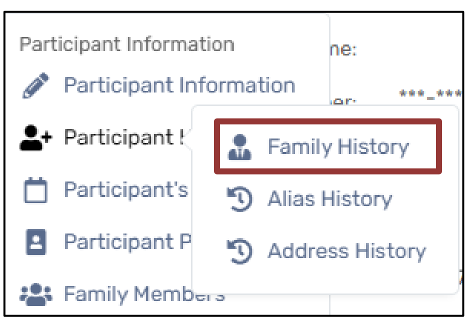


4. Add/update data fields on the Family and Contact Information and Immigration & Demographics pages.
5. Select Save in the lower right-hand corner. The User will return to the Family Members form.

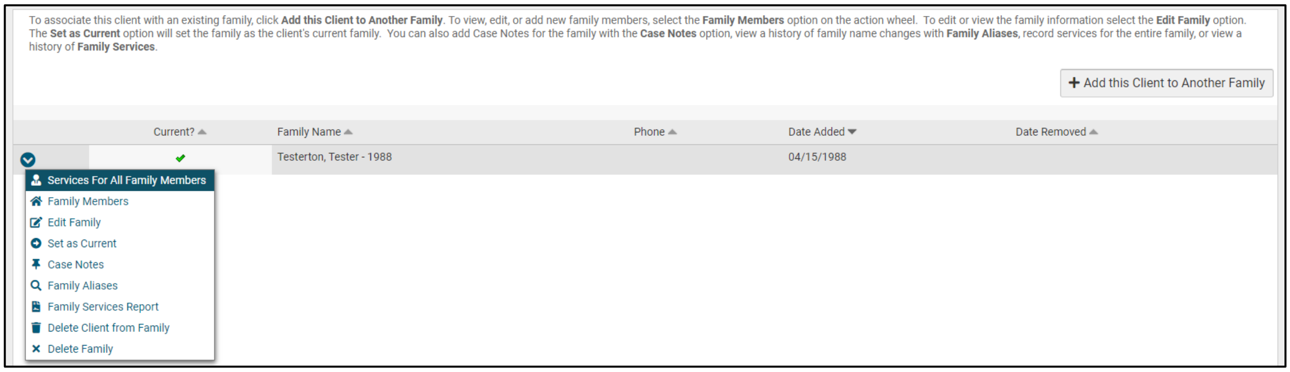
Family History

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.

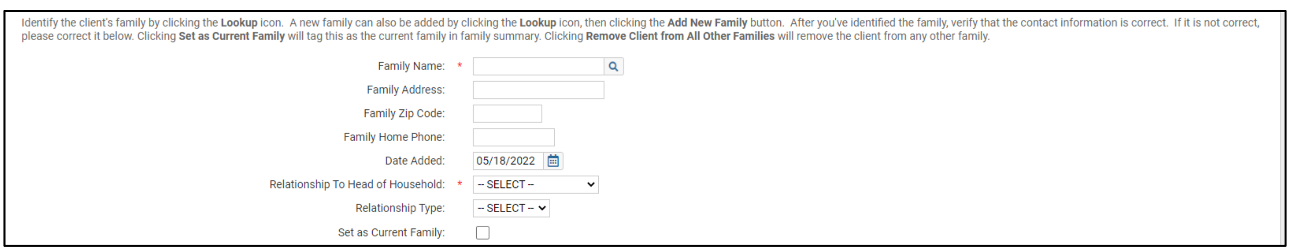


Adding a Participant to Another Family

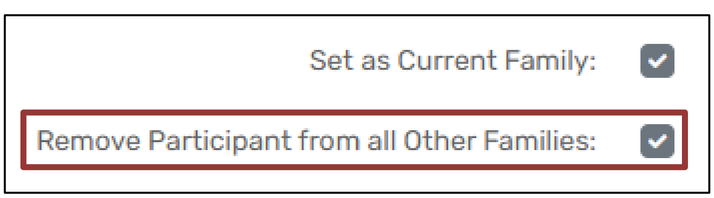
This functionality would be used when locating an individual who is entered separately, as their own family, but needs to be tied to an existing family.

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.



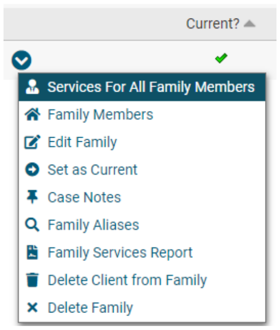
3. Select the Relationship To Head of Household and, if applicable enter the Relationship Type and check the Set as Current Family.
4. Setting as Current Family will create this family as the primary family for the participant.
5. If you select Set as Current Family, you will see an additional question



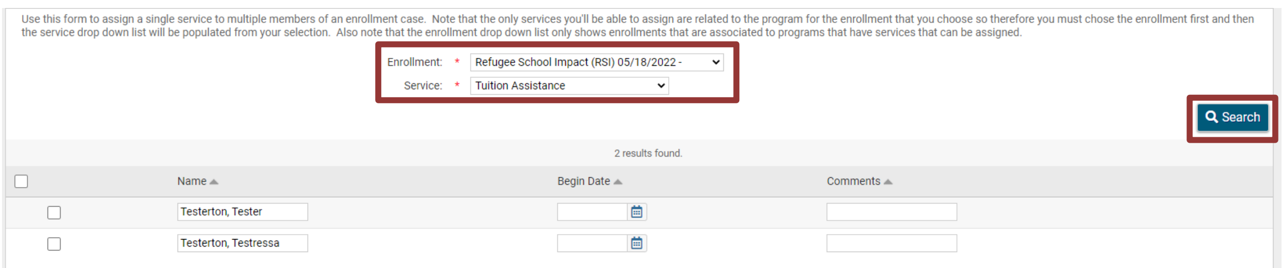
6. Removing the participant from all other families will remove the participant from any other family and integrate the participants' record into the new family.

Adding a 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.



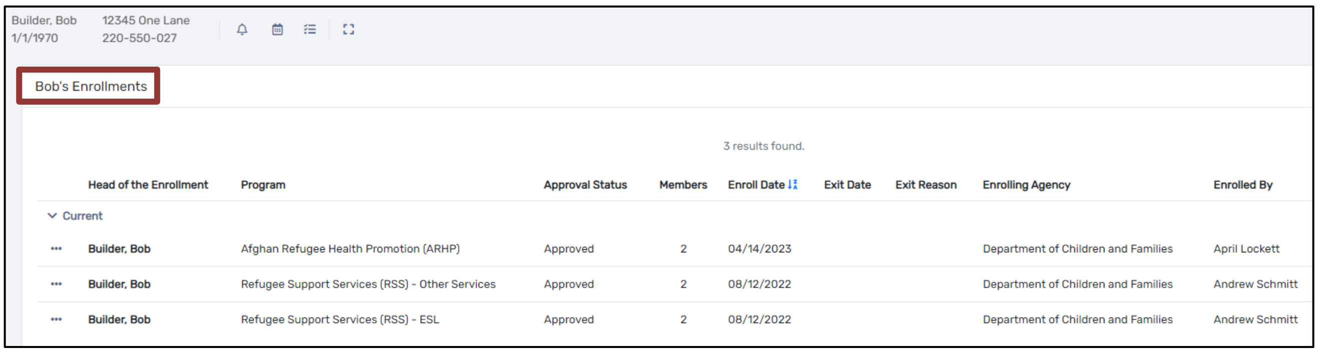
3. Choose the Enrollment first, followed by the desired Service.
4. Select Search to the right. This will search the selected enrollment for other enrolled Family Members.
5. Users may select the Family Members to apply the service to, enter the date and any comments.
6. Select Save & Close button, the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

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.

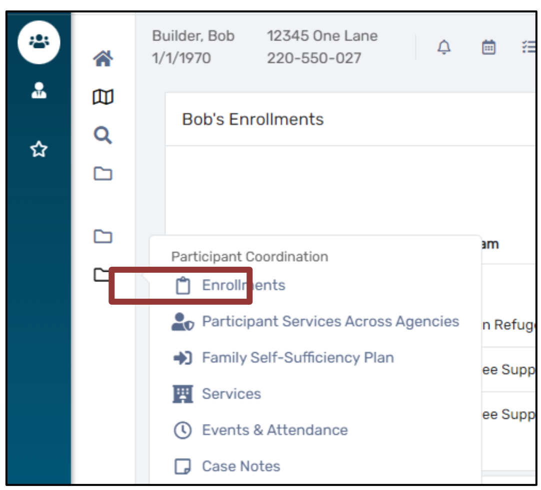
View Enrollments

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.

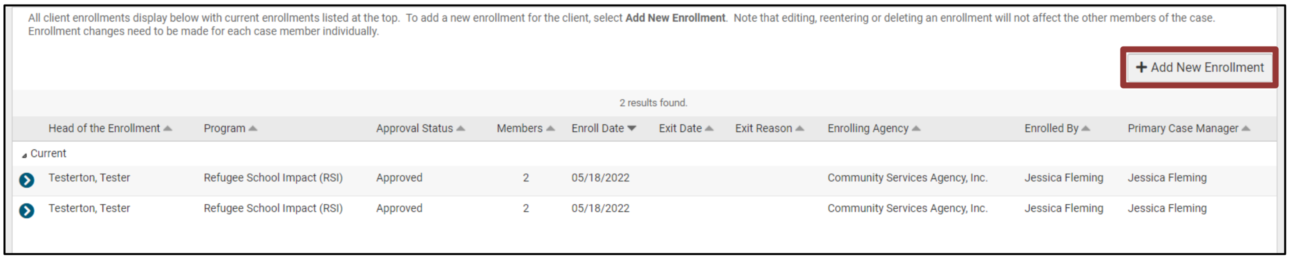
b) Second, users may navigate to the Participant Coordination menu group and select the Enrollments menu option.



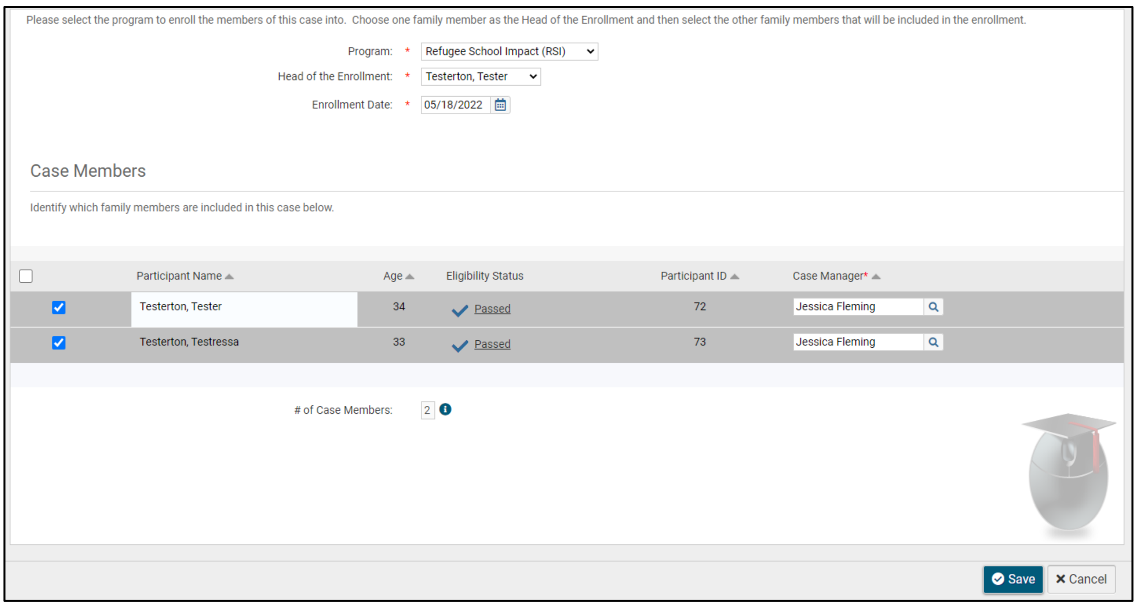
3. Both options will direct users to the Enrollments history form where users can View, Edit, or Add a New Enrollment.

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.

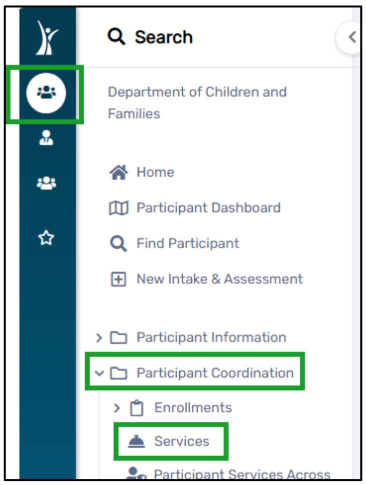
Completing an Enrollment: *Participant Workspace > Participant Coordination > Enrollments > Add a New Enrollment*

Services

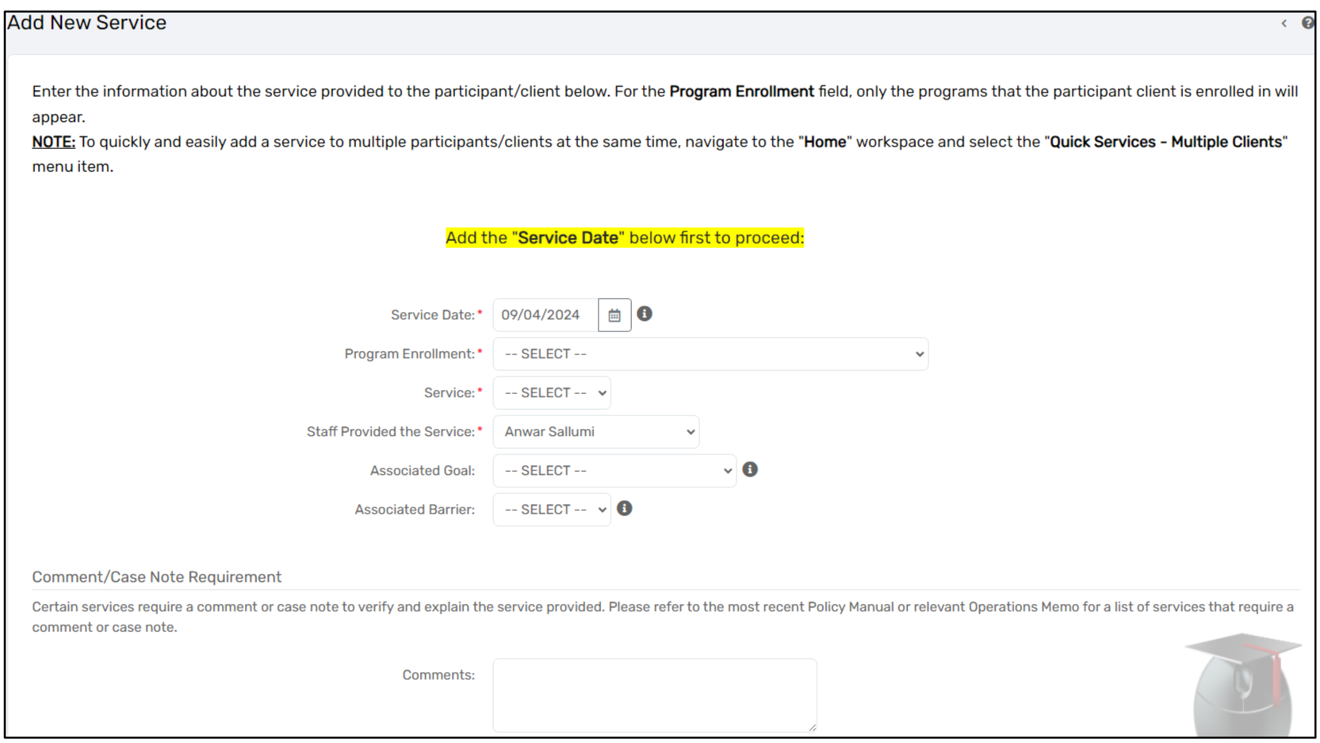
Services functionality allows for a user to record and add services that were provided to the participant during their enrollment and participation in the program.

Adding a Service

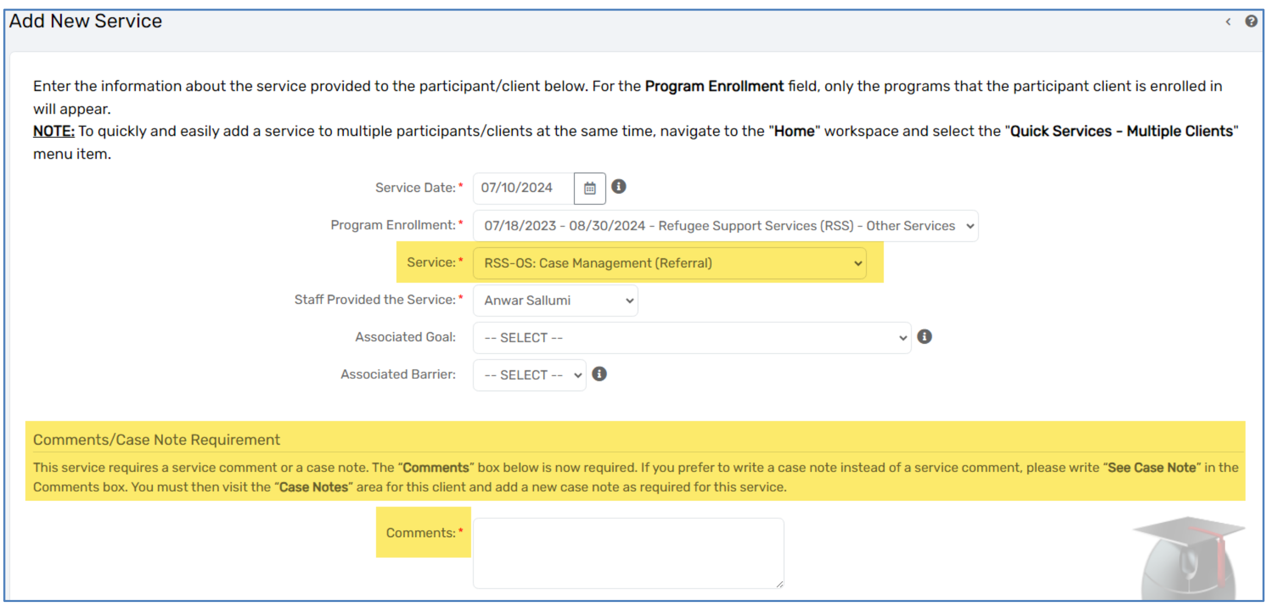
1. Navigate to the Participant workspace, find the Participant Coordination menu group, and select the Services menu option.



2. Click the Add New Service button in the right-hand corner to proceed. The "**Add New Service**" form will open:

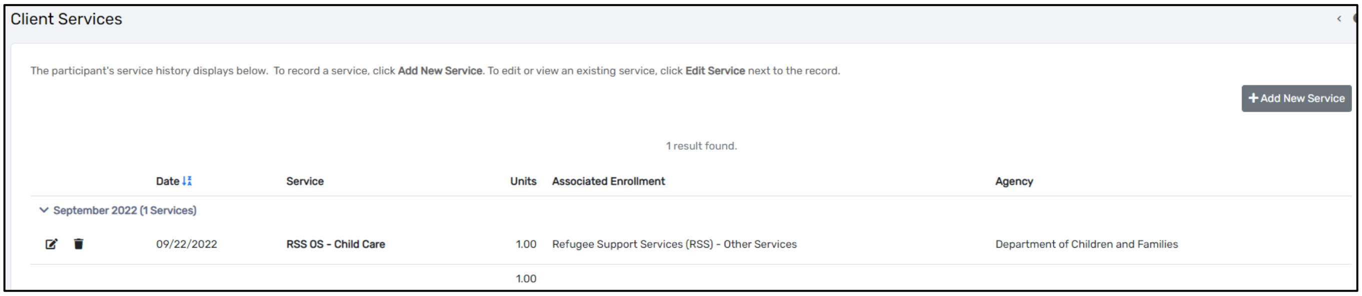


3. In the Service Date field, add the actual date when the service was provided. A future date is unallowable. If you do not add a date, both the Program Enrollment and Service fields will be invisible/unavailable in the form, and you will not be able to add a service.
4. It is required to select a Program Enrollment and Service from the drop-down lists. If no Program Enrollment is listed, that means the participant/client is not enrolled in any programs, and they need to be enrolled prior to adding the Service.
5. The Staff Provided the Service field shows the name of the user/staff who logged in the system by default. Some agencies may have a data entry staff who is dedicated to complete and enter all data in the system on behalf of other staff. So, this name may not be the correct name of the actual staff who provided/delivered the service to the participant/client. If needed, choose from the drop-down list the name of the actual staff who provided the service.
6. If applicable and needed, select the corresponding Associated Goal and Associated Barrier from the drop-down lists. As with the Program Enrollment list, missing Goals and Barriers will need to be added prior to adding the Service, they are not required though.
7. It is required to add a **Comment** or a **Case Note** for a number of services. If the user selects one of the services that require adding a Comment or Case Note (like the one in the example below), the Comment box becomes a required field, and the Comments/Case Note Requirement text will be changed to give more info. In such case, the form will not be saved before adding a comment. If the user prefers to add a Case Note, they should write "***See Case Note***" in the Comment box (for more information about how to add a case note, check the section "**Case Notes"**).



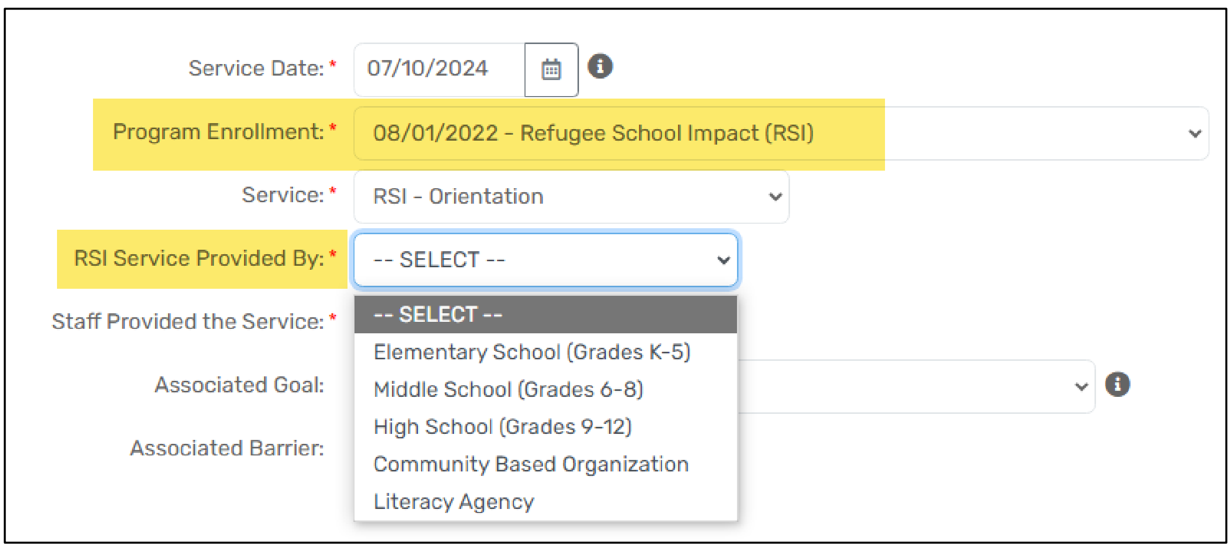
8. Click Save.

9. Once the service has been added, it will display on the Services history form, where additional options may be available like editing or deleting the service.



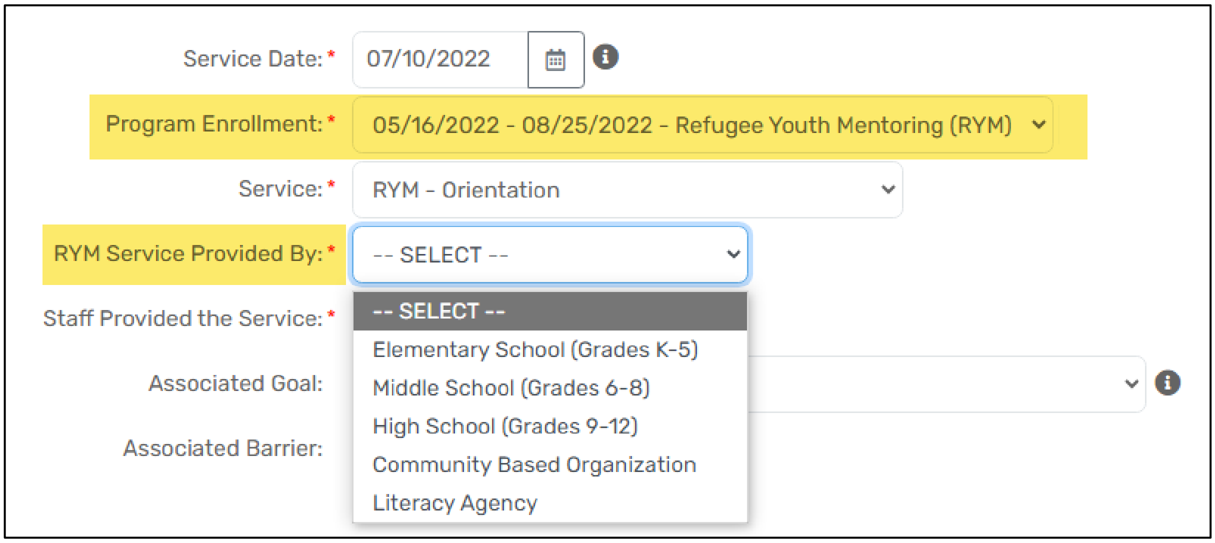
Adding RSI Services (Refugee School Impact program)

To add a new RSI service, the user follows the same steps of "**Adding a Service**" above. The only one minor difference is that once the user selects any Service of the **Refugee School Impact (RSI)** program, the required field RSI Service Provided By appears, and the user should select an option from the drop-down list. The user should complete the other fields and save the form.



Adding RYM Services (Refugee Youth Mentoring program)

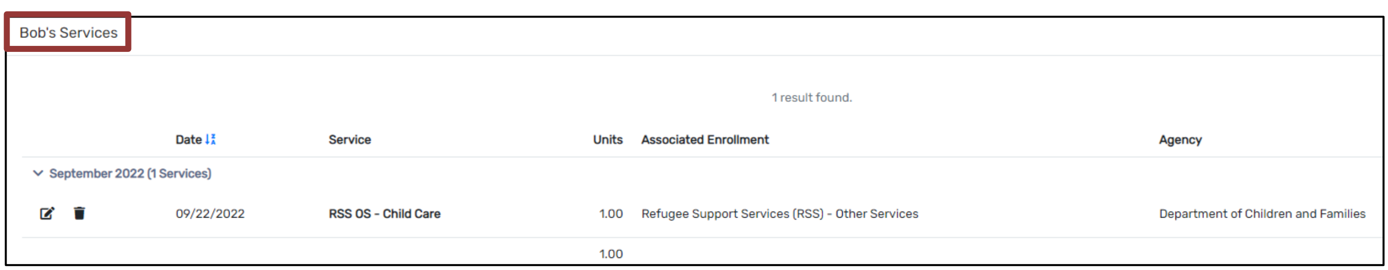
To add a new RYM service, the user follows the same steps of "**Adding a Service**" above. The only one minor difference is that once the user selects any Service of the **Refugee Youth Mentoring** (RYM) program, the required field RYM Service Provided By appears, and the user should select an option from the drop-down list. The user should complete the other fields and save the form.



Viewing Participant Services

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

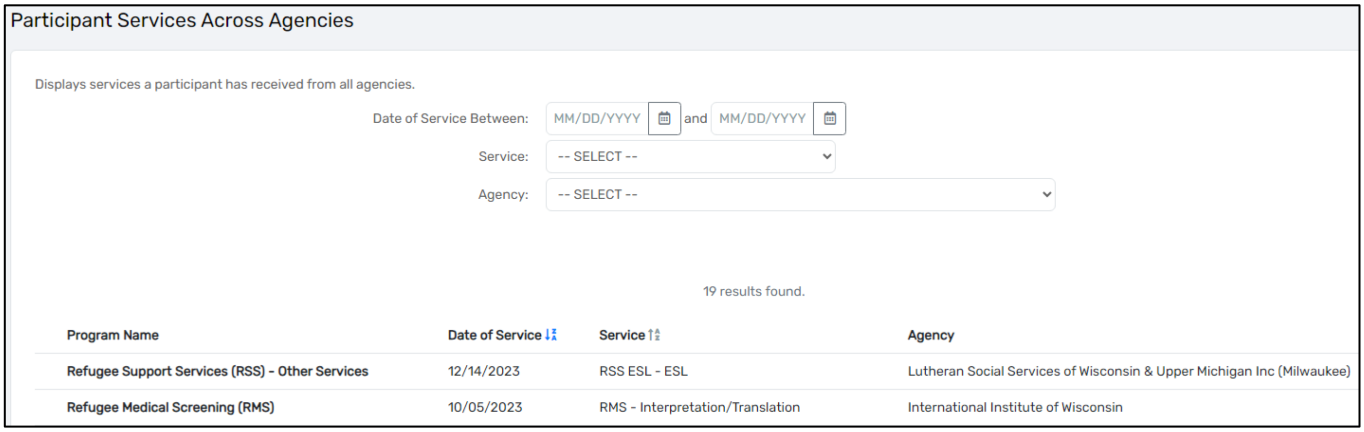
1. Participant Dashboard:
    a. In the Participant workspace, locate/select the participant into focus and navigate to the Participant Dashboard.
    b. Services that have been entered for the participant will display in the Services section of the dashboard.
    c. Users can also select the Participant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



2. Services History Form

    a. Users can also view the existing services by navigating to the Participants workspace, the Participant Coordination menu group, and Service menu option. This 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. The user's agency may determine which services are available to be seen.



Participant Services Across Agencies

Displays services a participant has received from all agencies.

Date of Service Between: MM/DD/YYYY and MM/DD/YYYY

Service: -- SELECT --

Agency: -- SELECT --

19 results found.

Program Name	Date of Service	Service	Agency
Refugee Support Services (RSS) - Other Services	12/14/2023	RSS ESL - ESL	Lutheran Social Services of Wisconsin & Upper Michigan Inc (Milwaukee)
Refugee Medical Screening (RMS)	10/05/2023	RMS - Interpretation/Translation	International Institute of Wisconsin

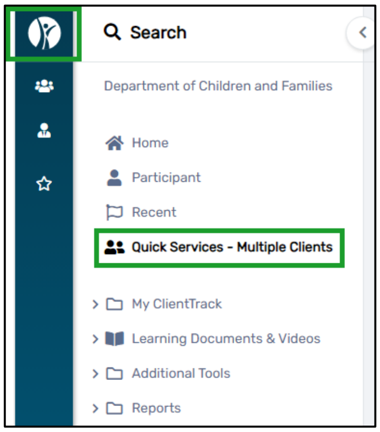
Edit a Service

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 history form.

Quick Services for Multiple Clients

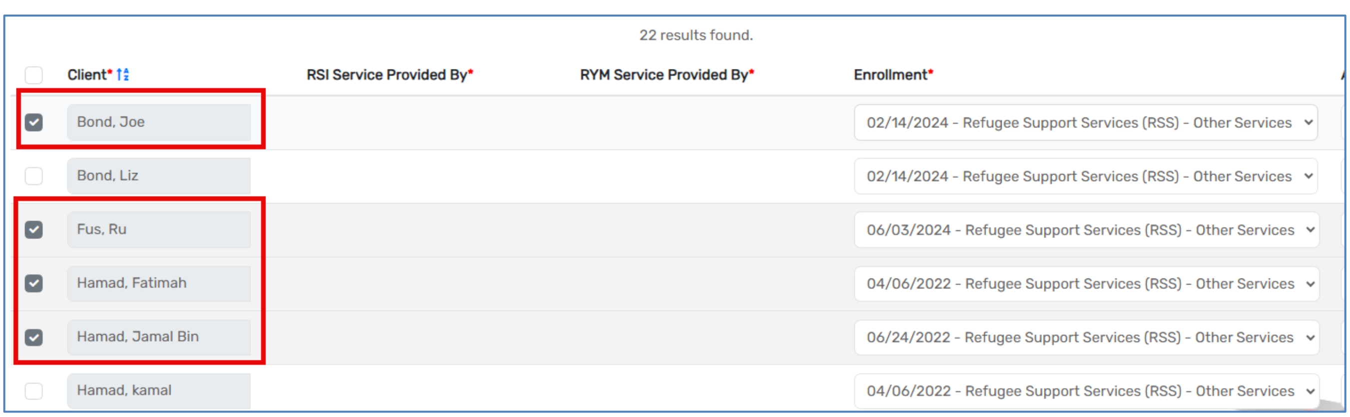
The user can quickly add one Service to multiple clients using **Quick Services for Multiple Clients.**

1. Navigate to the Home workspace and select the Quick Services - Multiple Clients menu item.



2. The user gets the same form **Add New Service** mentioned above but has an additional lower section that lists participants' information.
3. In the Service Date field, add the actual date when the service was provided. A future date is unallowable. If you do not add a date, both the Program Enrollment and Service fields will be invisible/unavailable in the form, and you will not be able to add a service.
4. Select a program from the drop-down list to pre-populate rows with participants who are already enrolled and active in the selected program.
5. Select a specific service from the drop-down list and complete the other required fields.
6. The Staff Provided the Service field should list the name of the actual staff who provided the service to the participant/client. Choose from the drop-down list the correct name of the staff if needed.
7. Check the box next to each participant who you want to record and add the service to.
8. Select RSI or RYM Service Provided By if RSI or RYM programs were selected.
9. Select Associated Goal or Associated Barrier as needed from the dropdown lists.
10. Click Save or Save & Close.

The screenshot below shows the lower section of the **Quick Services for Multiple Clients** form where participants who are enrolled in the selected program will be listed.

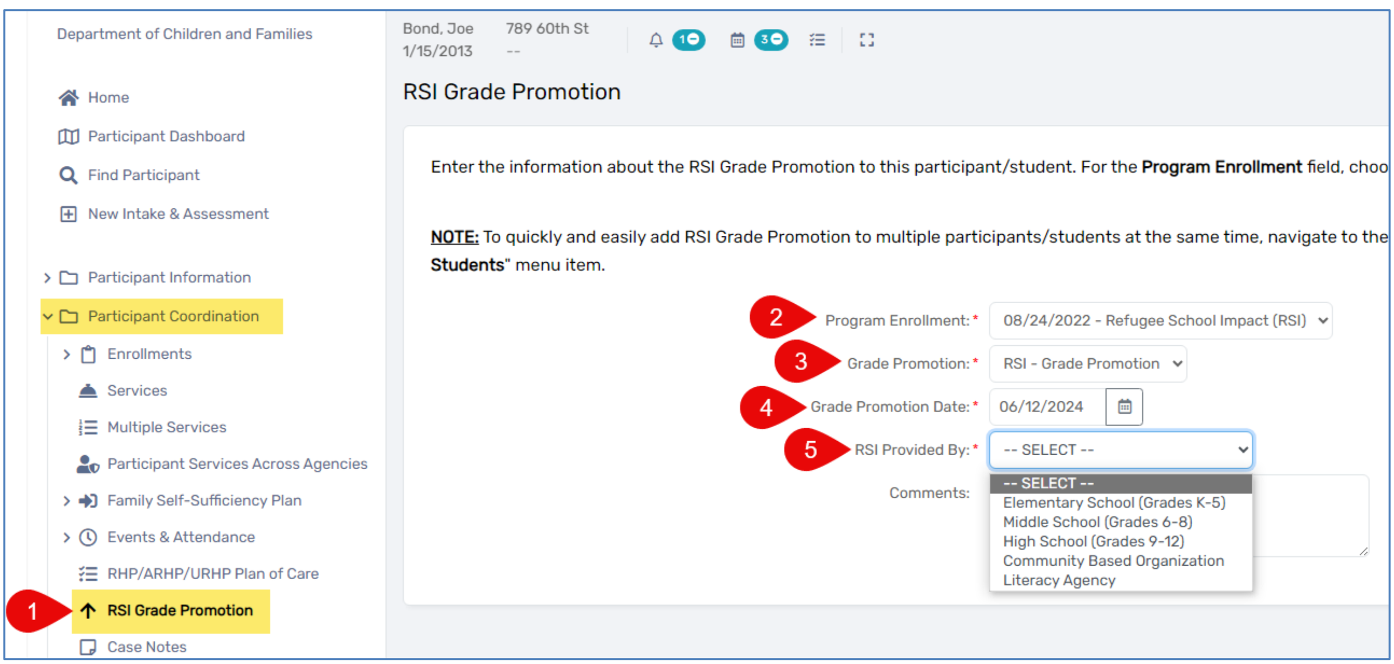


RSI Grade Promotion
(for Refugee School Impact program only)

Grade Promotion should be reported/added for **Refugee School Impact (RSI)** participants/students only. There are two methods to add and report RSI Grade Promotion, one method is for one participant/student only, while the other method is for multiple participants/students at the same time.

Adding Grade Promotion for One Participant/Student:

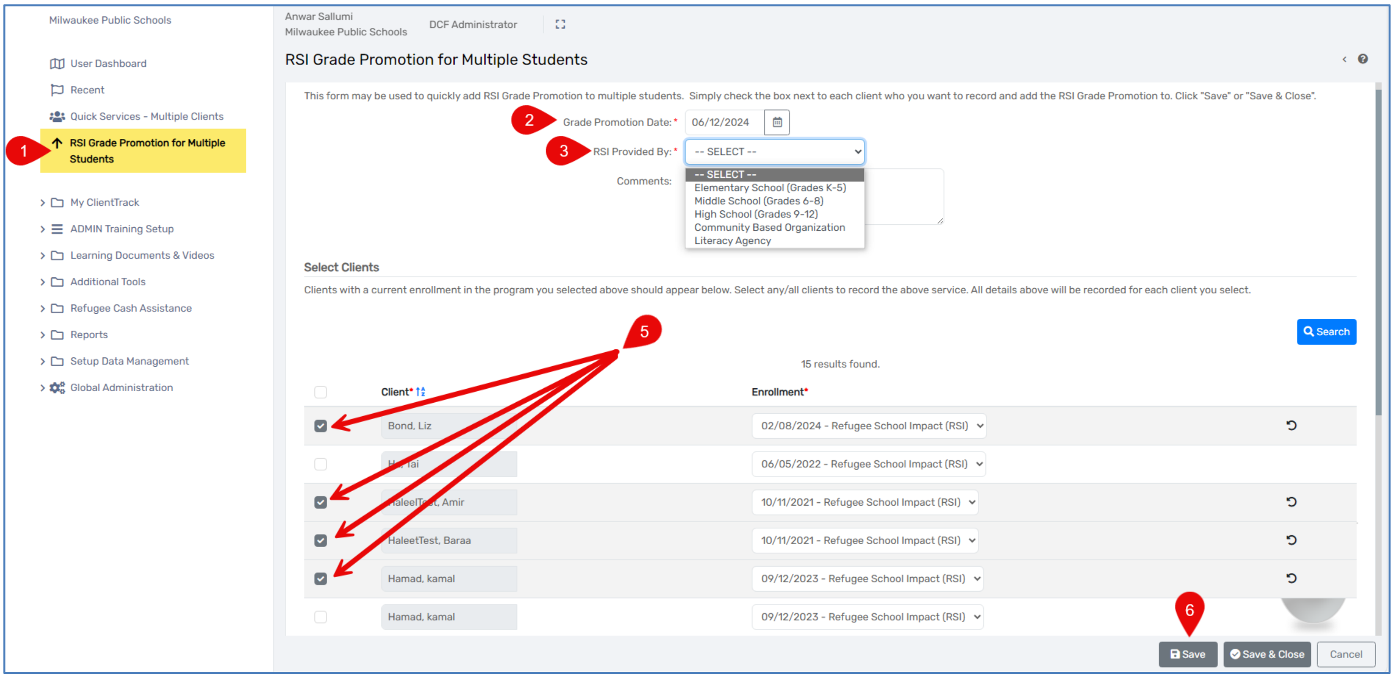
1. Navigate to the Participant workspace, find the Participant Coordination menu group, and click on the RSI Grade Promotion menu option.
2. For the "**Program Enrollment**" field, choose "**Refugee School Impact (RSI)**" from the dropdown list.
3. For the "**Grade Promotion**" field, choose "**RSI – Grade Promotion**" from the dropdown list.
4. For the "**Grade Promotion Date**" field, add the date when the participant/student's grade got promoted.
5. For the "**RSI Provided By**" field, choose from the dropdown list the agency type for the RSI provider.
6. Add a comment as needed.
7. Click "Save" button.



Adding Grade Promotion for Multiple Participants/Students:

1. Navigate to the Home workspace, find click the RSI Grade Promotion for Multiple Students menu option. Once you open this form, your agency's RSI active participants/students will be listed. If you did not find this list, click on the "Search" blue button on the right side.
2. For the "**Grade Promotion Date**" field, add the date when the participants/students' grade got promoted.

3. For the “**RSI Provided By**” field, choose from the dropdown list the agency type for the RSI provider.
4. Add a comment as needed.
5. Check the small box in front of each participant/student who you want to report their RSI Grade Promotion. Leave others’ boxes unchecked if you do not want to report RSI Grade Promotion for them. Make sure that “**Refugee School Impact (RSI)**” is listed in the “**Enrollment**” field, if not then you can click on the dropdown list and choose it.
6. Click “Save” button.

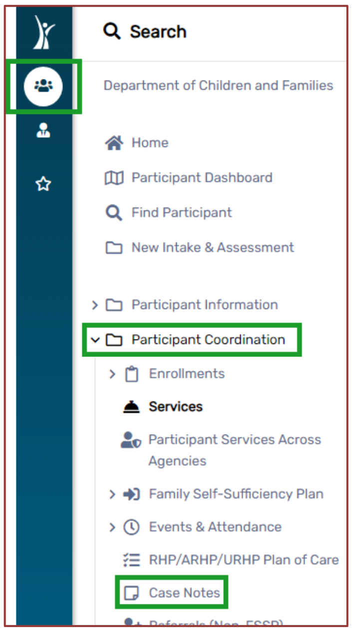


Case Notes

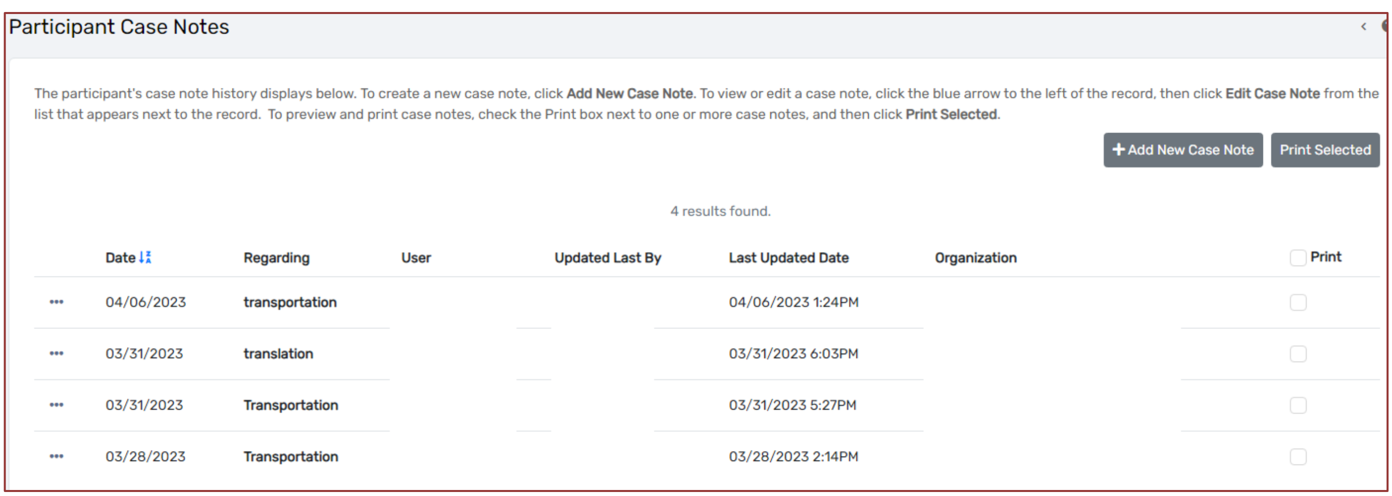
Case Note functionality allows a user to add a case note to document and give more information and details on service provision, participants' engagement in programs, and progress over time.

Adding a Case Note

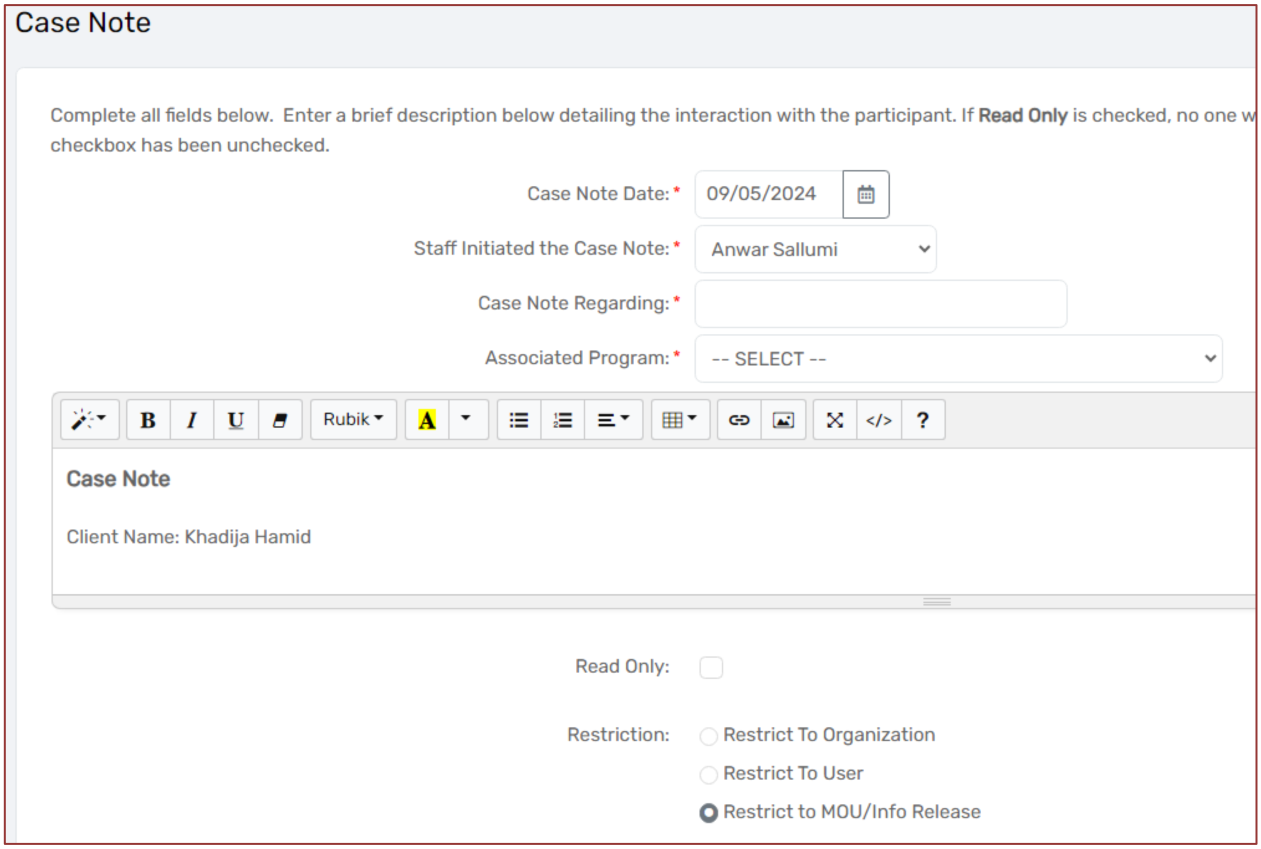
1- Navigate to the Participant workspace, find the Participant Coordination menu group, and select the Case Notes menu option.



2- A list of the participant/client's case notes history appears.



3- Click the Add New Case Note button in the right-hand corner to proceed. The "**Add New Case Note**" form will open:

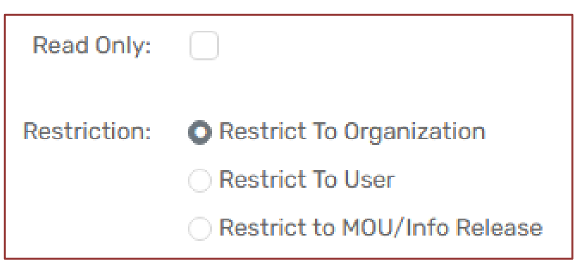


4- The Staff Initiated the Case Note field shows the name of the user/staff who logged in the system by default. Some agencies may have a data entry staff who is dedicated to complete and enter all data in the system on behalf of other staff. So, this name may not be the correct name of the actual staff who would add/write the Case Note to the participant/client. If needed, choose from the drop-down list the name of the actual staff.

5- Complete all other required fields and click the Save button.

Case Note Restrictions

The Case Note form has options for restrictions and to make a case note more appropriate for confidential purposes:



- If the check box Read Only is checked, no one can edit the case note.

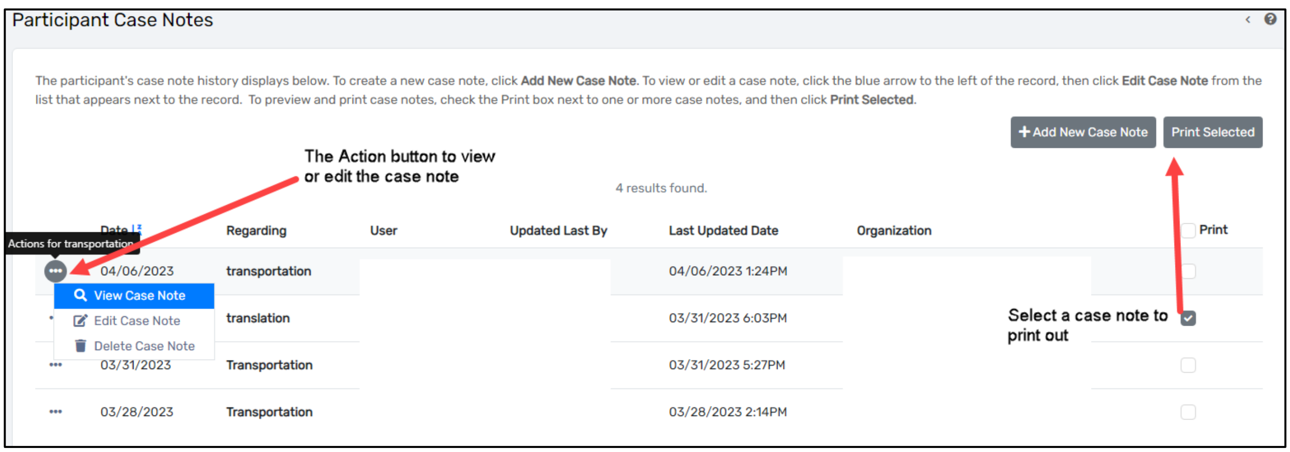
- The Restriction radio buttons allow the user to select one of the three restriction options:
  - Restrict To Organization makes the case note available and viewable only by the organization/agency's staff, none from other organizations/agencies can view and read the case note.
  - Restrict To User makes the case note available and viewable only by the user/staff who add the case note, and no other users/staff from the same organization/agency can view and read the case notes.

  - Restrict to MOU/Info Release makes the case note available and viewable only by the users/staff of the organizations/agencies that share a Memorandum of Understanding (MOU) or Release of Information agreement that allows sharing the data/info of this specific participant/client (or all participants/clients) among other organizations/agencies that have signed the MOU or agreement.

Viewing/Editing/Printing a Case Note

1- Navigate to the Participant workspace, find the Participant Coordination menu group, and select the Case Notes menu option.

2- The list of the participant/client's case notes history appears.



3- Click the Action button (…) on the left of a case note to get options to view, edit, or delete the case note.

4- Check the box on the right side of a case note and click the Print Selected button to print out the case note.

***Viewing/Editing/Printing a Case Note**: Participant Workspace > Participant Coordination > Case Notes*

Document Upload

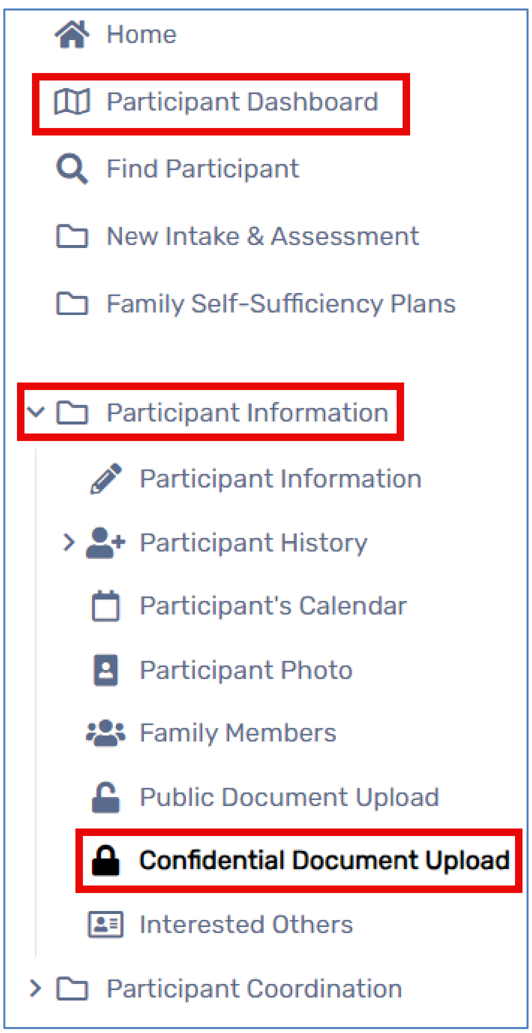
Document upload functionality allows a user to upload documents in any format and save them in the system.

Uploading a Document

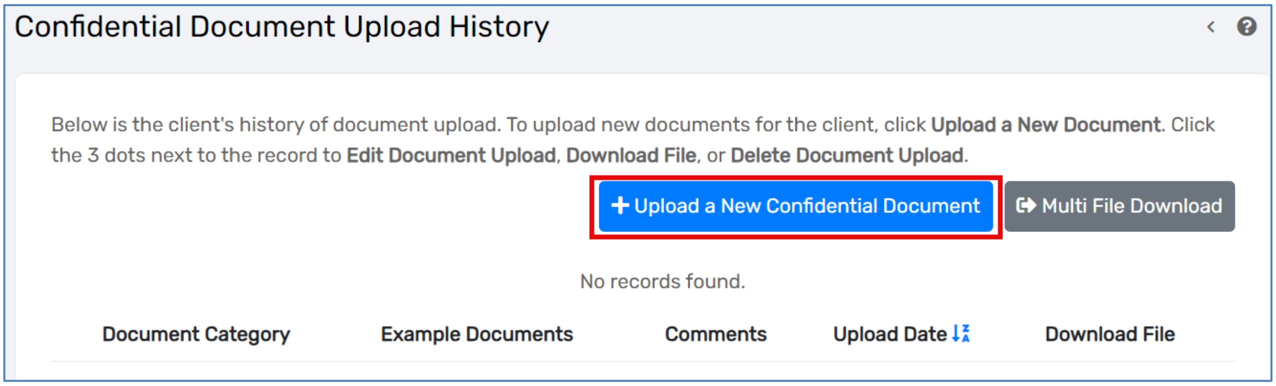
There are two types of documents to upload in the system, confidential and public documents.

a. **Uploading Confidential Document:** It is a private document, like medical or legal one, that an agency does not want to share with other agencies. This type of document can be seen by and available for only the agency that uploads the document. However, if the current/selected participant's record has been already shared with any other agency(s) using **Information Release Exceptions** function, the other agency(s) can also see and download the uploaded confidential documents. To upload a confidential document:

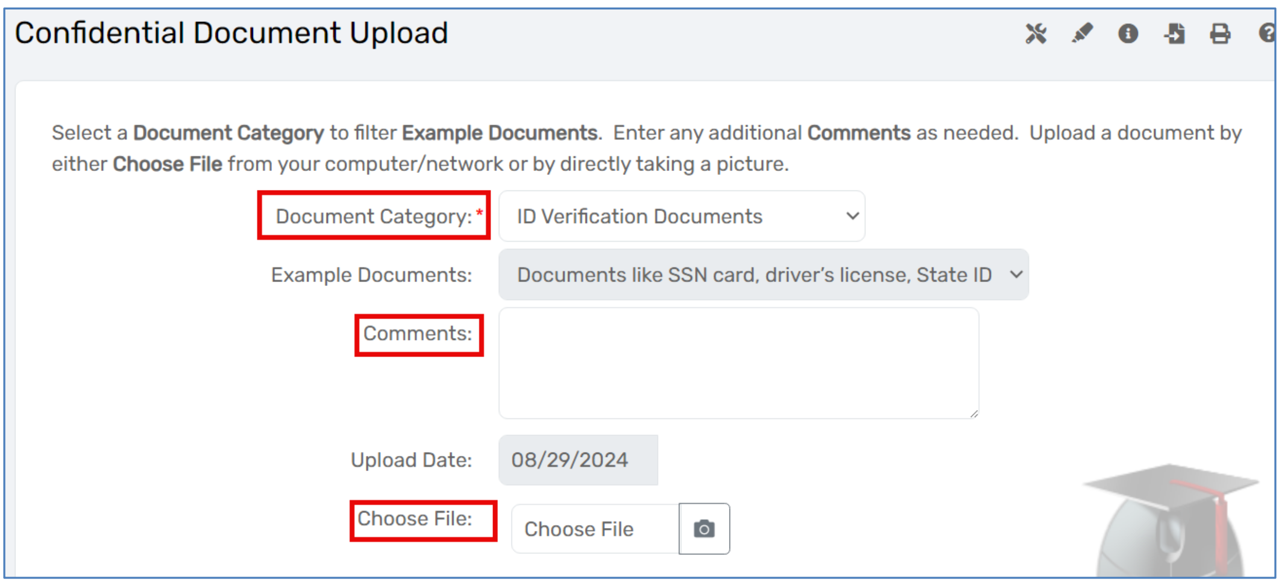
1. Navigate to the Participant workspace, find the Participant Information menu group, and select the Confidential Document Upload menu option.



2. Click on Upload a New Confidential Document button.



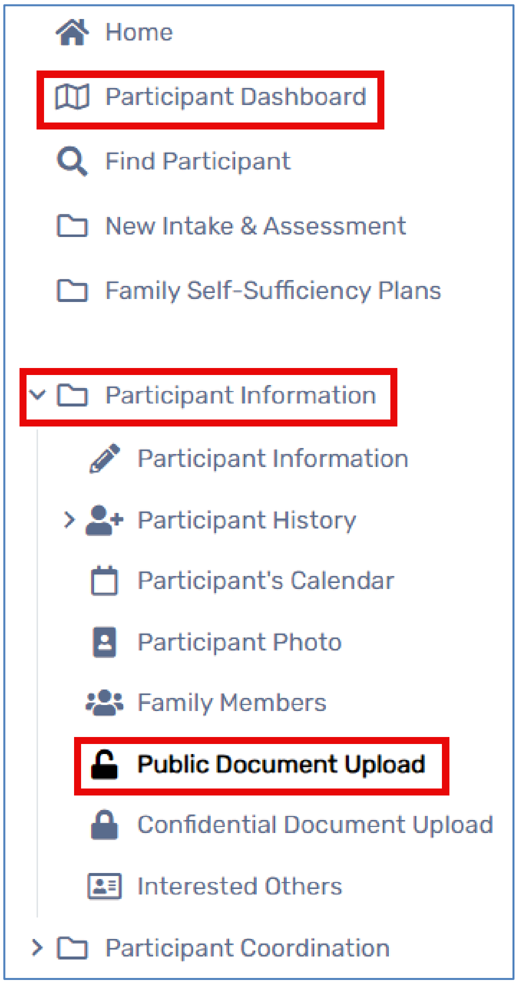
3. Select an option from the Document Category drop-down list to filter the Example Documents field. Each option in the Document Category drop-down list automatically populates the Example Documents field and gives examples of documents for upload. Add a comment if necessary to give more details on the uploaded document.



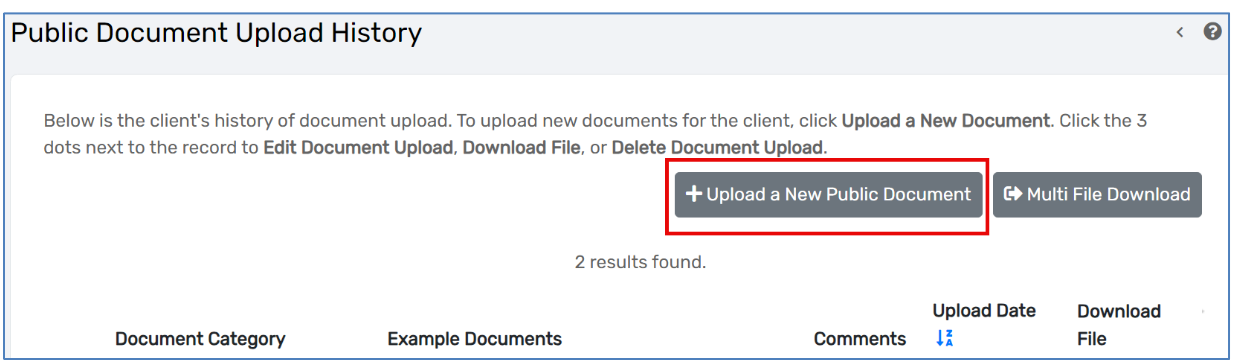
4. Click on Choose File to upload a document from your device. You can also click on the camera icon to take a photo for the document you want to upload, this works using a computer camara, a mobile phone, or a tablet.
5. Click Save after uploading the document.

b. **Uploading Public Document:** This type of document can be seen by and available for all agencies:

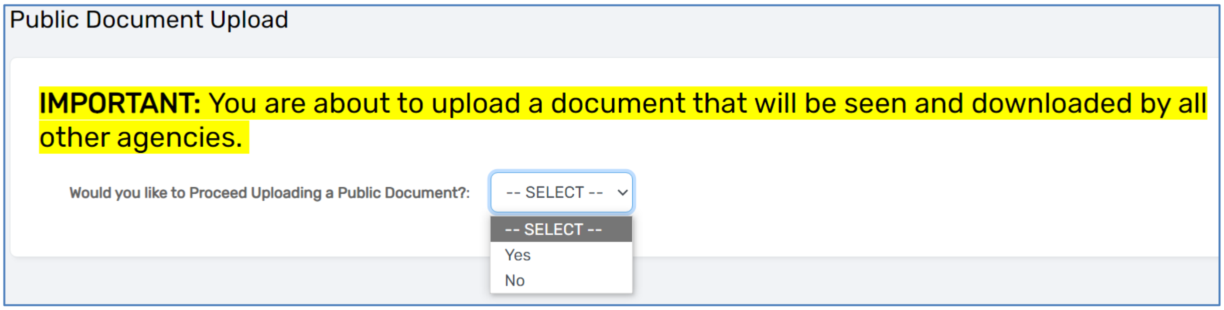
1. Navigate to the Participant workspace, find the Participant Information menu group, and select the Public Document Upload menu option.



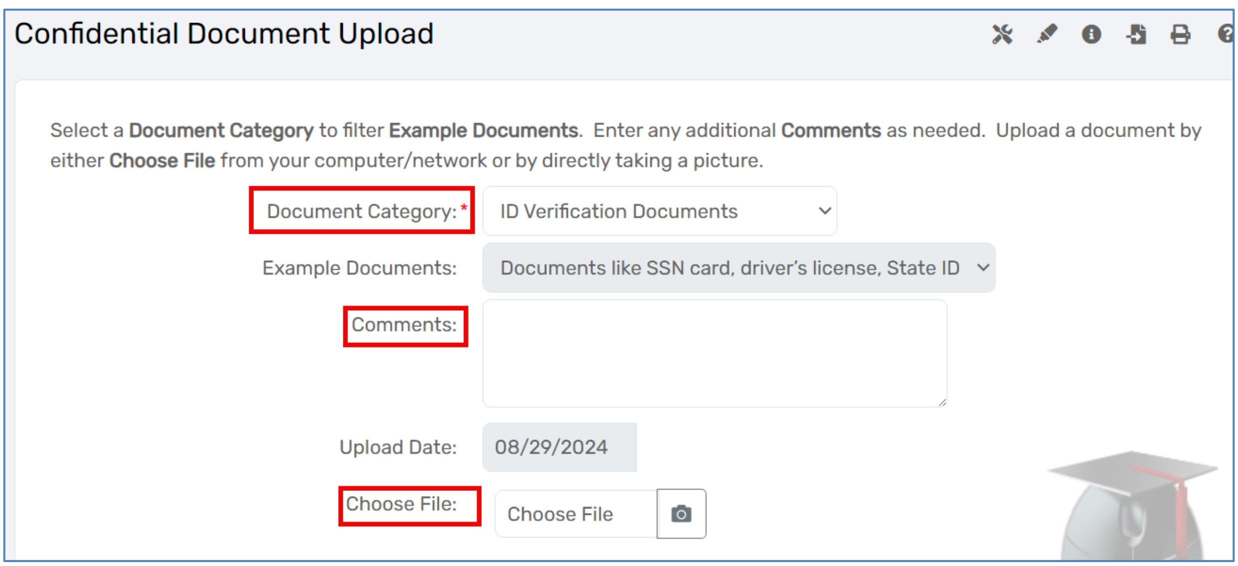
2. Click on Upload a New Confidential Document button.



3. Select "Yes" from the drop-down list if you are certain and would like to upload a document that will be seen and downloaded by all agencies.

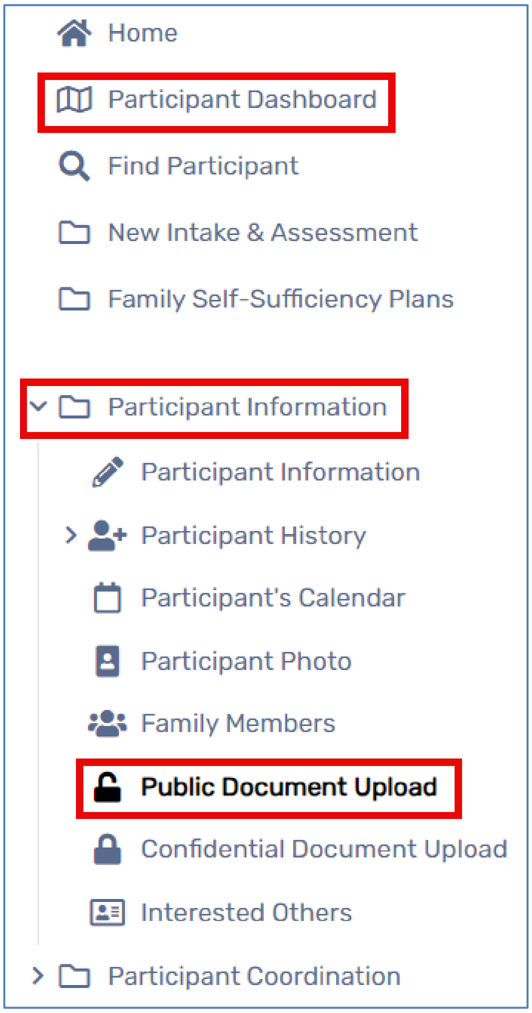


4. If you select "Yes", you can proceed to upload a document.
5. Select an option from the Document Category drop-down list to filter the Example Documents field. Each option in the Document Category drop-down list automatically populates the Example Documents field and gives examples of documents for upload. Add a comment if necessary to give more details on the uploaded document.
6. Click on Choose File to upload a document from your device. You can also click on the camera icon to take a photo for the document you want to upload, this works using a computer camara, a mobile phone, or a tablet.



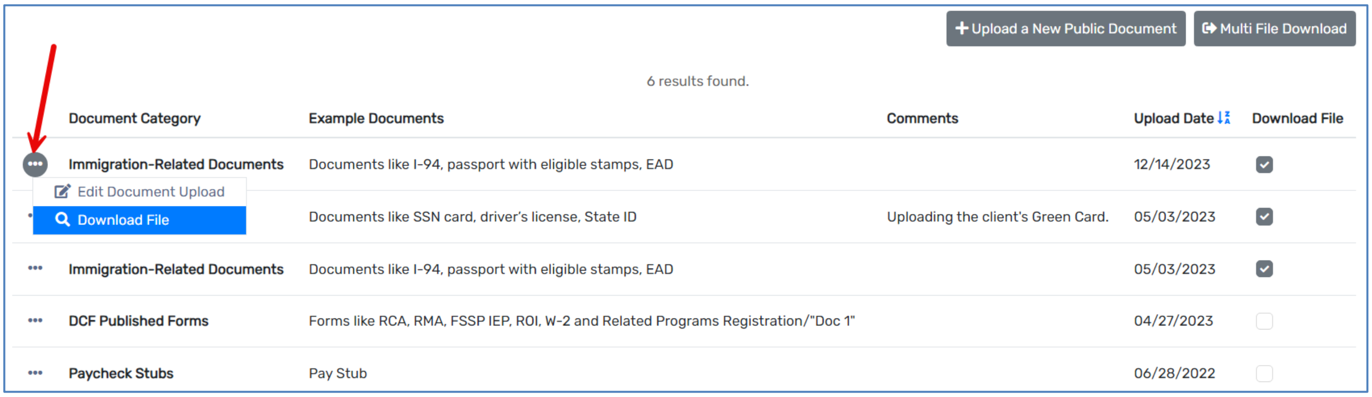
Downloading a Document

1. Navigate to the Participant workspace, find the Participant Information menu group, and select the Public Document Upload menu option.

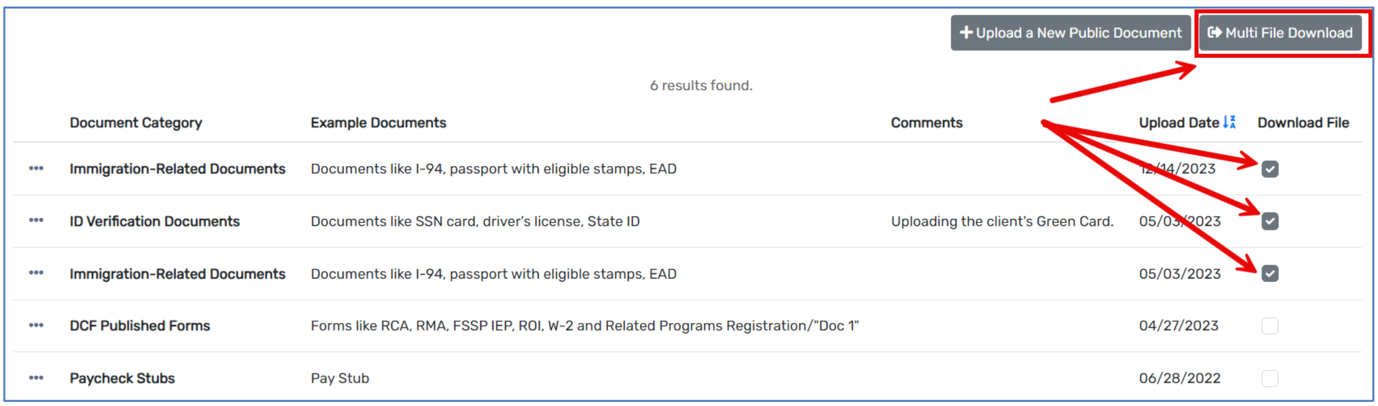


2. You will get a list of all uploaded documents for the selected participant. There are two ways to download documents from the list:

    a. Either to download one specific document by clicking the action button (the 3 dots), and then select “Download File”. The file/document will be saved in your device.



b. Or to download a number of documents one time by checking the boxes of the documents, and then to click the “Multi File Download” button. The files/documents will be saved in your device.

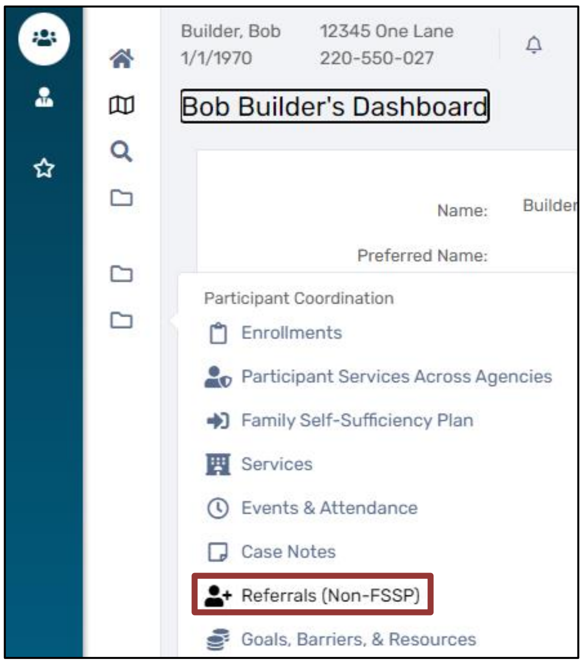


Referrals

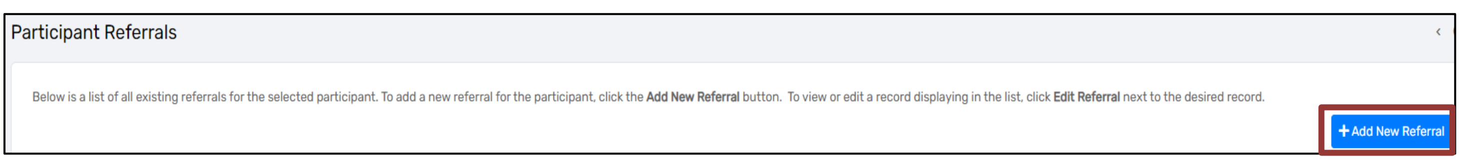
Referrals allows for a user to record referrals that were made to or received from a provider during the participants participation with the program.

Recording a Referral

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

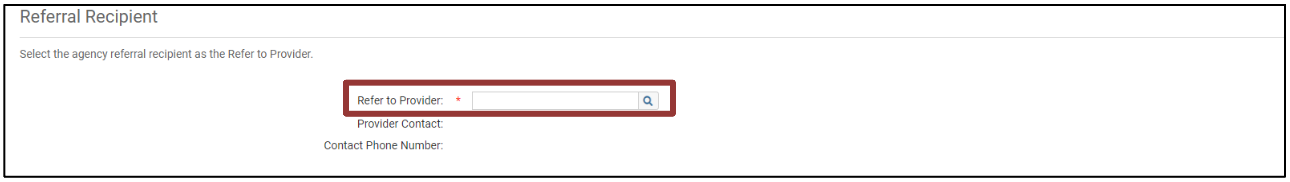


2. Select Add New Referral in the right-hand corner to proceed.

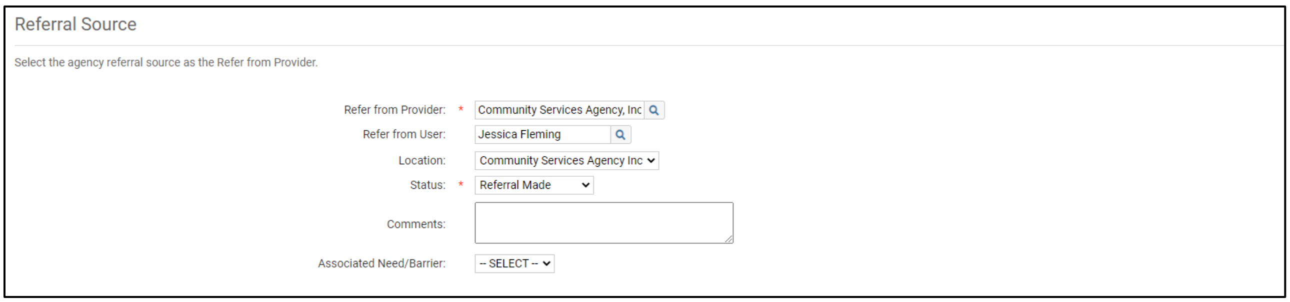


3. Users are required to select a Referral Date and Referral Service to proceed because the following section is dependent on the type of Referral Service.

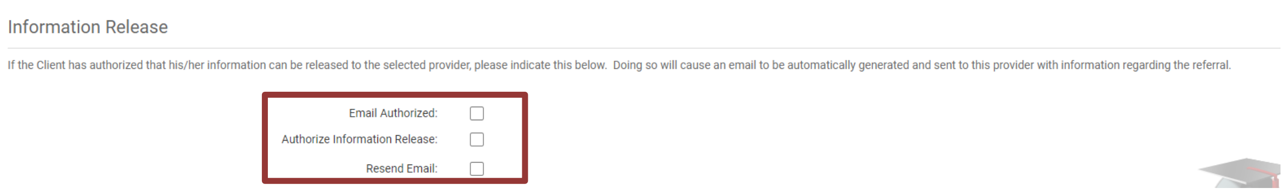
4. Use the search function via the magnifying glass to locate the appropriate Provider. This list will be tailored to only providers who offer the Referral Service selected above.



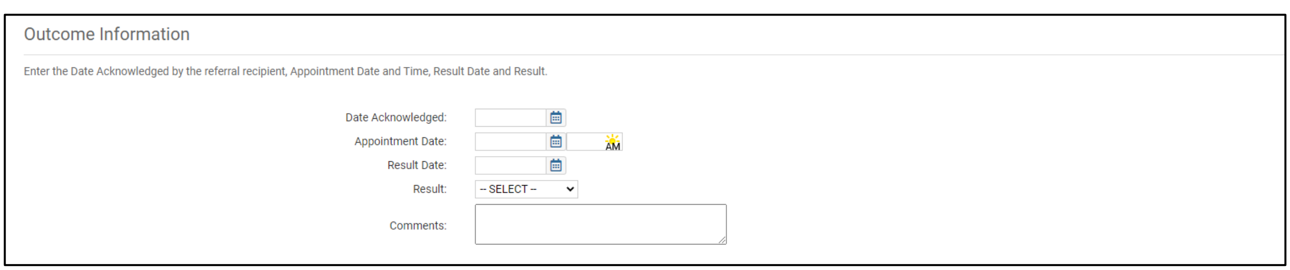
5. The Referral Source section will automatically fill in information from the user and the associated provider agency. The user may then adjust the Status, leave a Comment and if applicable, add an Associated Need/Barrier.



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.

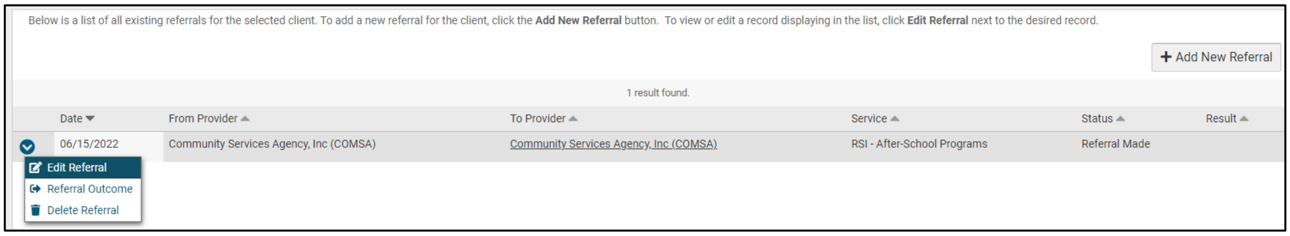


7. Select Next to navigate to the Referral Outcome section.



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

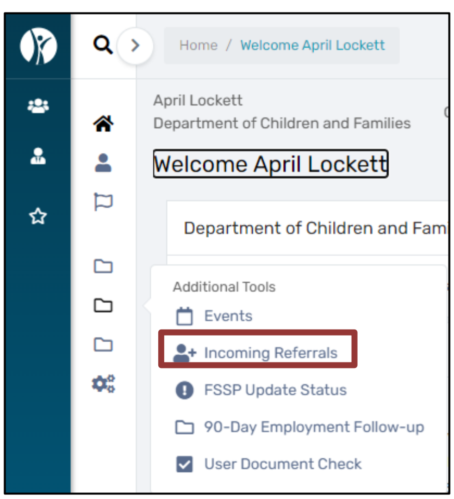
1. To add a referral outcome for a referral that does not have an outcome, select the Referral Outcome option from the action button.
2. The user will be directed to the second page of the Referral form to enter the appropriate information.
3. Once the Referral Outcome is entered, select Finish.
4. The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

Editing a Referral

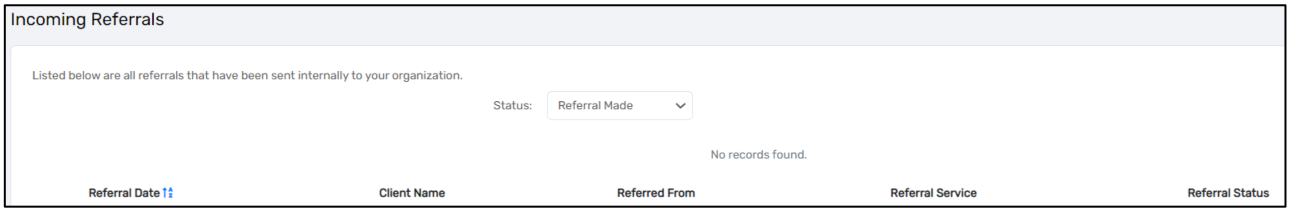
1. To make edits to a referral, select the Edit Referral option from the action button.
2. The user will then be directed to the Referral form where they may update any of the information to be correct.
3. Once the Referral and/or Referral Outcome information is updated, select Finish.
4. The updated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

Incoming Referrals

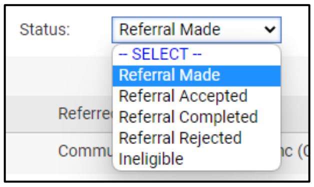
1. Navigate to the Home workspace, find the Additional Tools menu group, and select the Incoming Referrals Menu Option.



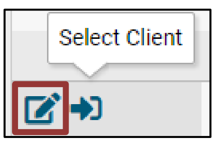
2. The Incoming Referrals form will display all incoming referrals that have been sent to the organization you are logged in as.



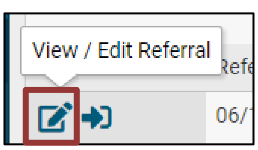
3. Users can filter the results based on the current Status of the referral.



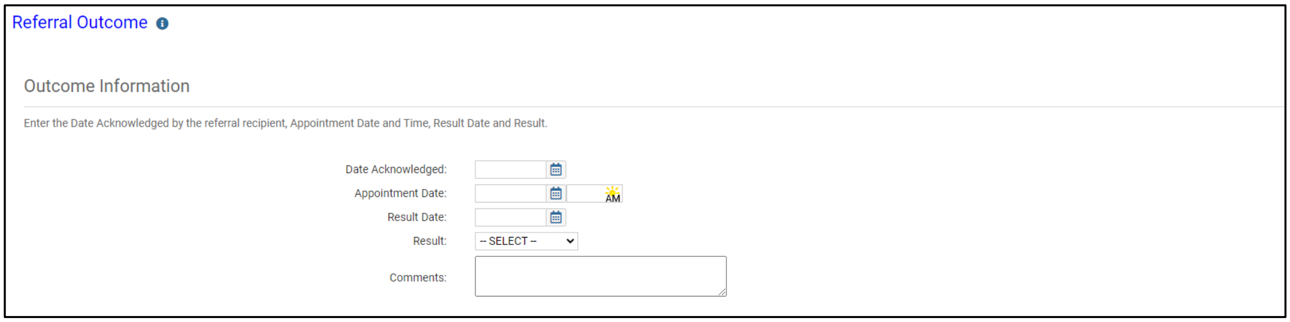
4. Once the correct set of referrals is in focus, the user should locate the correct participant and select one of the two action buttons to the left.
   a. Selecting the Select Client button will redirect the user to the Participant Dashboard in the Participant Workspace.



   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*

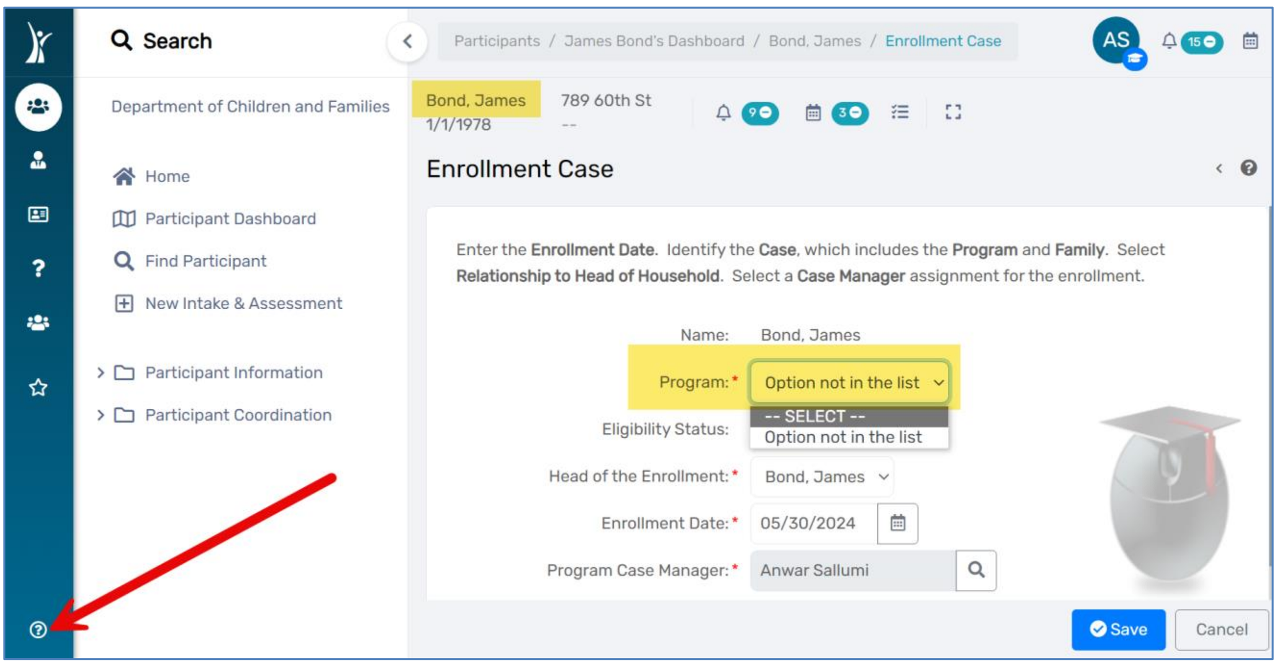
Help and Issue Ticket Submission

The **Help Center** tool is useful to submit an issue ticket in WRPD/ClientTrack system.

1- Make sure you open the record/dashboard of the participant for whom you faced an issue.

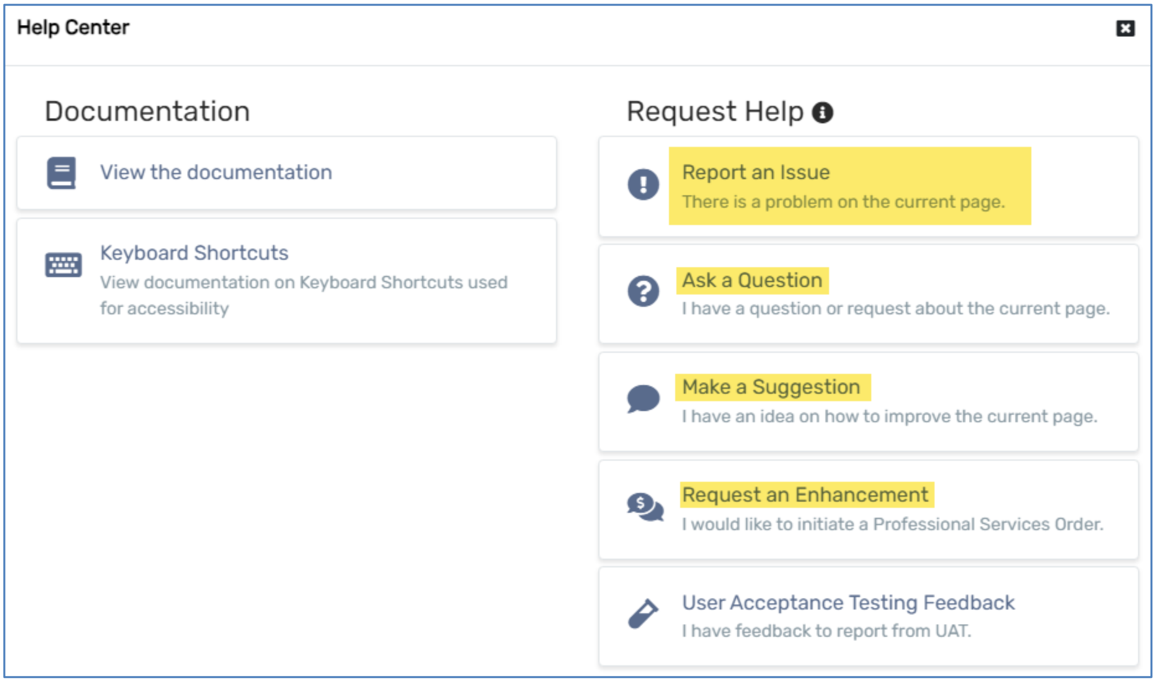
2- Make sure you open the exact same form/page where you have an issue or question.

*For example, the screenshot below shows that I opened and selected the participant "**James Bond**", and I navigated to the form/page where I had an issue that the "**Program**" field does not give me options to choose from (highlighted in yellow below).*

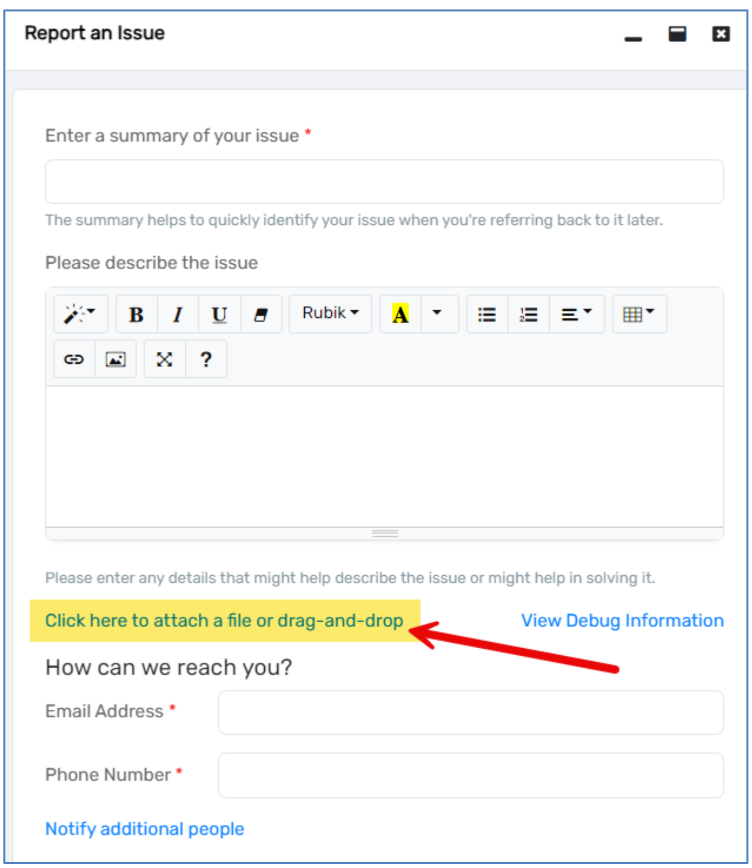


3- Click on the question mark icon on the left lower corner of the screen (where the red arrow is pointing to in the screenshot above).

4- You get the Help Center window where you mainly can **Report and Issue/Problem** on the current page. You can also **Ask a Question**, **Make a Suggestion**, or **Request an Enhancement**.



5- Click on **Report an Issue** tile to submit an issue ticket. Complete the Summary, Description, Email, and Phone fields. You may attach a file or a screenshot as needed.



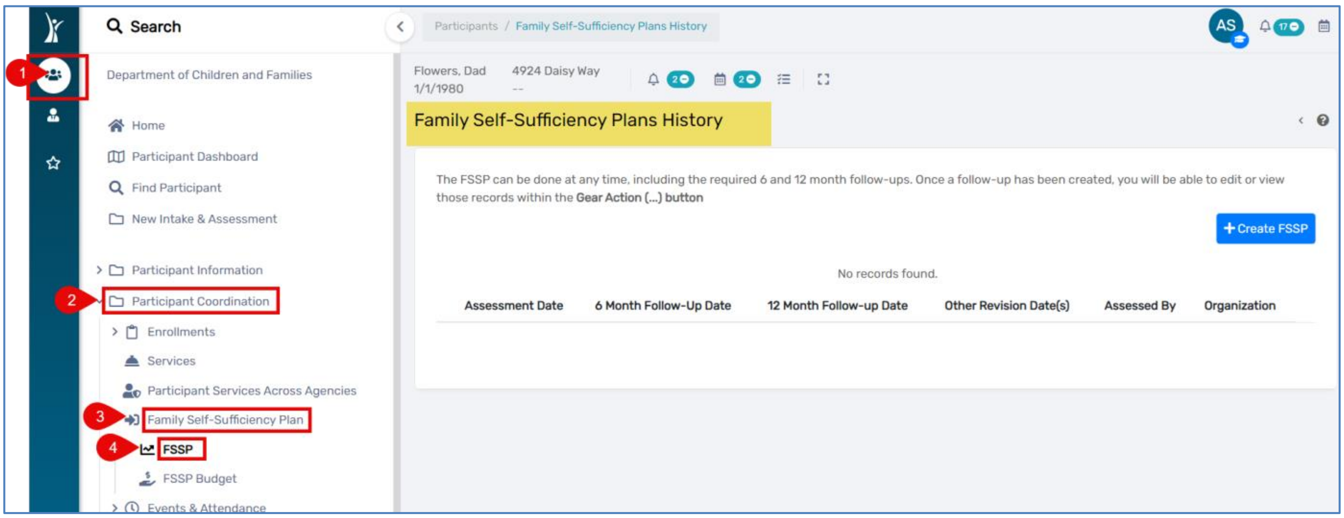
The Family Self-Sufficiency Plan (FSSP)

Please note: Screenshots within this guide does not show actual participants' data, and no PII is displayed herein.

The purpose of this section is to inform users on the overall process of managing and how to navigate the Family Self-Sufficiency Plan (FSSP) in WRPD/ClientTrack system.

Navigation

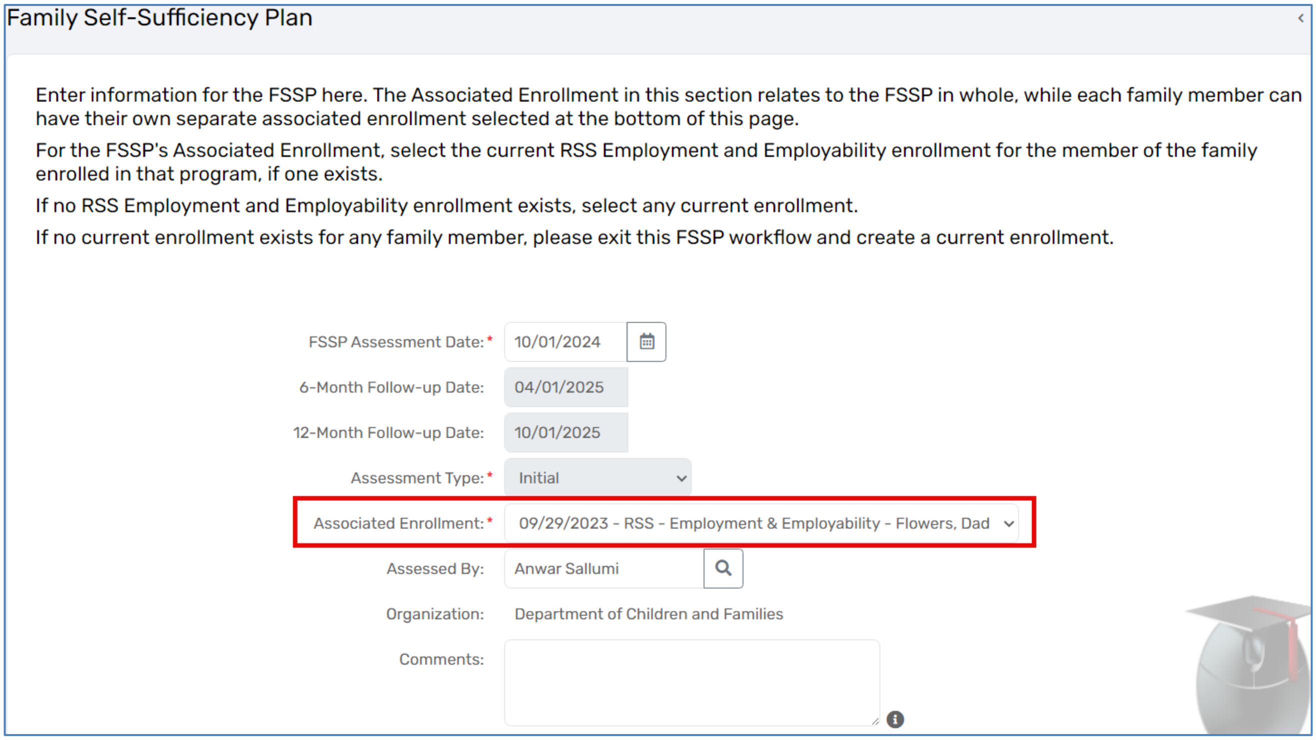
FSSPs are accessed/managed from ***Participant workspace > Participant Coordination > Family Self-Sufficiency Plan > FSSP***. The **Family Self-Sufficiency Plans History** screen/form opens. Almost all tasks related to FSSPs will be conducted from this screen/form.



Creating a New FSSP

One Family Self-Sufficiency Plan (FSSP) needs to be created for each one family/case. This one FSSP will include all family/case members. Duplicated open/active FSSPs for the same participant or family is not allowable. To create a new FSSP:

- Navigate to the dashboard of the Head of the Household/Principal Applicant (PA) of the case/family.
- Make sure that this participant has at least one enrollment in any program (NOT necessary to be enrolled in the RSS program).
- Navigate to the **Family Self-Sufficiency Plans History** screen/form (from ***Participant workspace > Participant Coordination > Family Self-Sufficiency Plan > FSSP)***.
- Click the Create FSSP button. This will launch the FSSP workflow.
- Add the FSSP Assessment Date (make sure to put the actual date of the new FSSP).
- The fields 6-Month Follow-up Date, 12-Month Follow-up Date and Assessment Type will be populated automatically according to the 'FSSP Assessment Date' field.
- For the Associated Enrollment field, select a program enrollment from the drop-down list. If there are no program enrollments listed, that means the participant does not have any enrollments in any programs. In this case, you need to Pause the FSSP workflow, navigate to the Program Enrollment, and add an appropriated program enrollment to this participant. Then you can resume/return to the FSSP workflow and add the newly added program enrollment from the Associated Enrollment drop-down list. (Learn more about how to Pause and Resume the FSSP workflow in the section after Family Members).
- Scroll down to the Family Members section in the same screen/from.


Family Self-Sufficiency Plan

Enter information for the FSSP here. The Associated Enrollment in this section relates to the FSSP in whole, while each family member can have their own separate associated enrollment selected at the bottom of this page.

For the FSSP's Associated Enrollment, select the current RSS Employment and Employability enrollment for the member of the family enrolled in that program, if one exists.

If no RSS Employment and Employability enrollment exists, select any current enrollment.

If no current enrollment exists for any family member, please exit this FSSP workflow and create a current enrollment.

FSSP Assessment Date:*	10/01/2024
6-Month Follow-up Date:	04/01/2025
12-Month Follow-up Date:	10/01/2025
Assessment Type:*	Initial
Associated Enrollment:*	09/29/2023 - RSS - Employment & Employability - Flowers, Dad
Assessed By:	Anwar Sallumi
Organization:	Department of Children and Families
Comments:	

Family Members

All family members associated with the selected participant will display in this section. If any family members are missing, Pause the FSSP workflow and navigate to **Participant Information > Family Members**, and add family members as needed. This may require completing new Intakes for the family members if they are not already recorded in WRPD/ClientTrack. After adding the missing family member(s), resume the FSSP workflow.

To complete the Family Members section in the FSSP workflow:

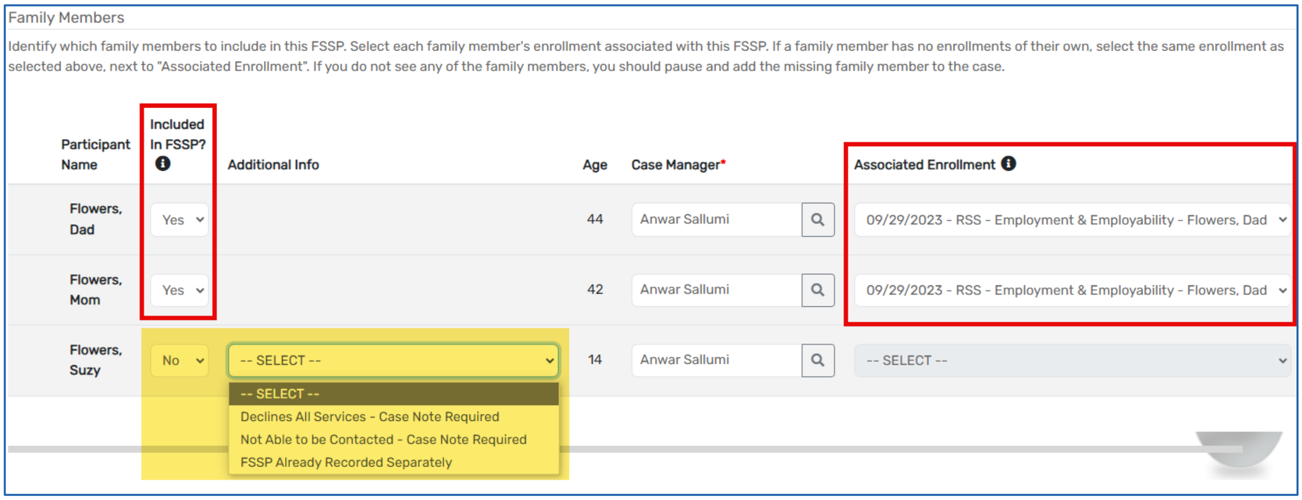
- Identify which family members to include in this FSSP. The default value will display 'Yes' under 'Included in FSSP?' for all current family members. In most cases, all members of the family will be included in the FSSP*.
- Select a program enrollment for each family members from the Associated Enrollment drop-down list. It is not required for all family members other than the PA to have their own program enrollments. If a family member does not have their own program enrollments, select the same enrollment that was already selected above next to "Associated Enrollment" for the Head of the Household/PA.

Choosing *NOT* to Include a Family Member(s) in the FSSP:

By changing the value in the 'Included in FSSP?' field to 'No', you will need to select one of the following options from the corresponding 'Additional Info' field. Select the option that most appropriately reflects the circumstances.

Reasons for Excluding a Family Member in the FSSP include:

1. Declines All Services – Case Note Required
2. Not Able to be Contacted – Case Note Required
3. FSSP Already Recorded Separately*



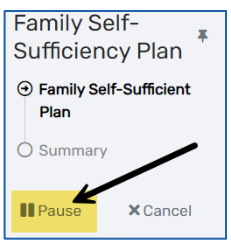
* It is expected that all members of the same family are included in the same FSSP, and it is very rare that a user should select "FSSP Already Recorded Separately". Please contact BRP for instruction on when and why it may be allowable for a person to be on a separate FSSP from the rest of their family.

- Once all fields have been completed, click 'Next' to proceed to next step of this FSSP workflow "Participant Goals Associated with this FSSP".

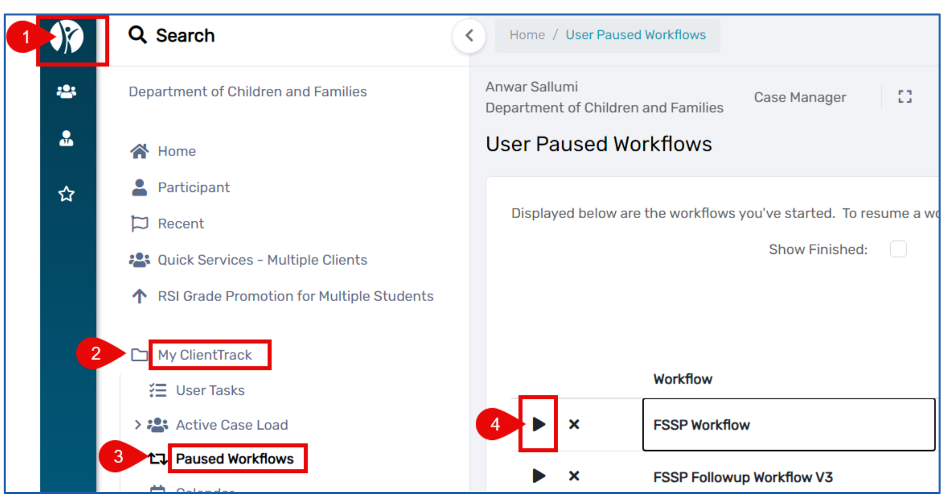
How to Pause and Resume Workflows

Working on workflows, like the FSSP one, may have several steps and may take time to complete and save. In some situations, you may need to stop and do something else, but of course you do not want to lose your work and the info/data that you have already entered in the workflow. In this case you can use the Pause tool to save your work and resume any time or day later.

To pause the FSSP workflow, click on Pause on the left side. This will close the workflow.



To resume your work from where you left in the workflow, navigate to **Home > My ClientTrack > Paused Workflows** and click the workflow that you want to resume.



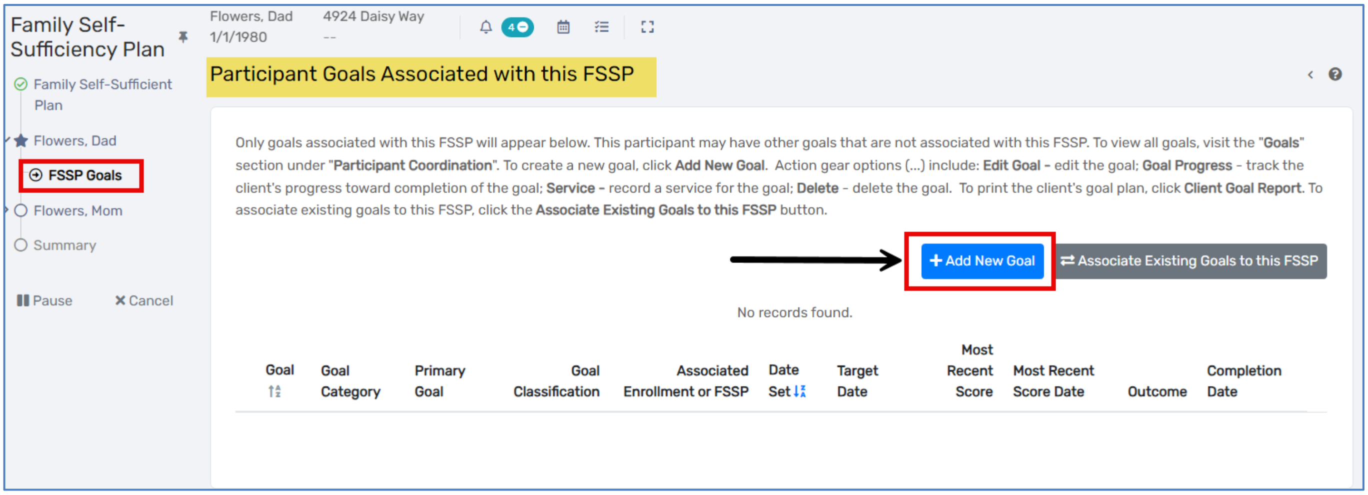
Participant Goals Associated with this FSSP

After clicking 'Next' in the previous step, the FSSP Goals step/screen will open for the first family member. By default, only goals associated with this FSSP will appear on this step/screen for each family member.

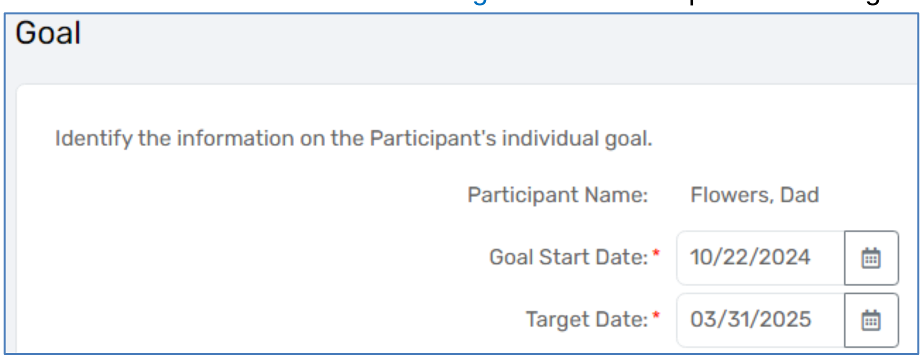
Adding a New FSSP Goal

To add a new goal to the list of goals associated with this FSSP:

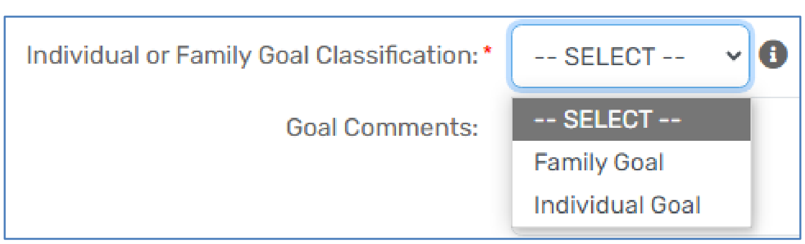
- Click the 'Add New Goal' button in the upper right corner of the screen.



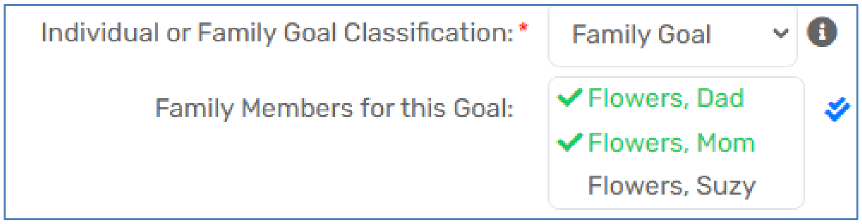
- This opens a data entry form wherein the information related to the specific goal will be entered.
- Add the Goal Start Date and the Target Date for completion of the goal.



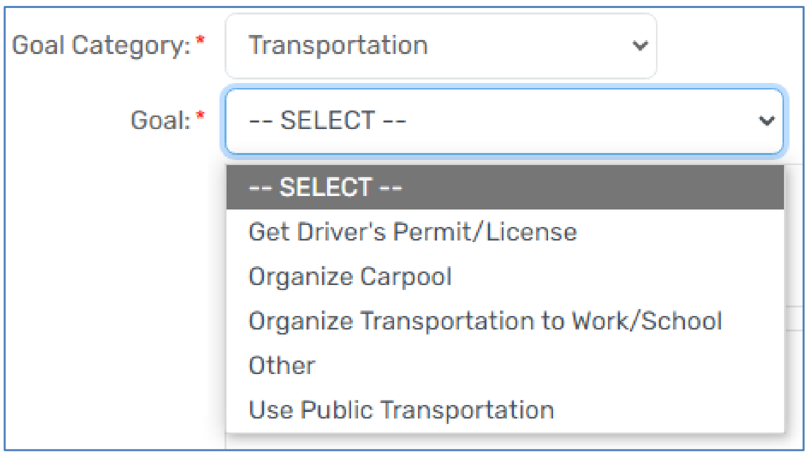
- From the 'Individual or Family Goal Classification' drop-down list, select either 'Family Goal' or 'Individual Goal'.
  Goals can be created one person at a time, or for multiple members at the same time. Family goals can later be updated through any family member with that goal, and all of the other family members with same goal will receive the same update(s). If you want to record family members' goal updates separately (at different times, etc.) then you need to create separate Individual Goals for each family member.



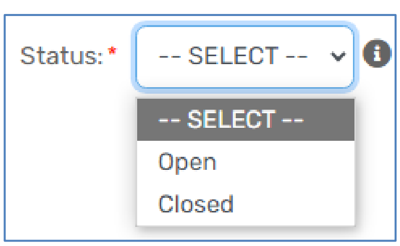
- If ‘Family Goal’ is selected, the new field ‘Family Members for this Goal’ will be added automatically to the form, and you can select which member(s) of the family the goal applies to. Family Goals can later be updated through any family member with that goal.



- Select an option from the ‘Goal Category’ drop-down list.
- From the ‘Goal’ drop-down list, select one of the options that are related to the ‘Goal Category’ that you select earlier.



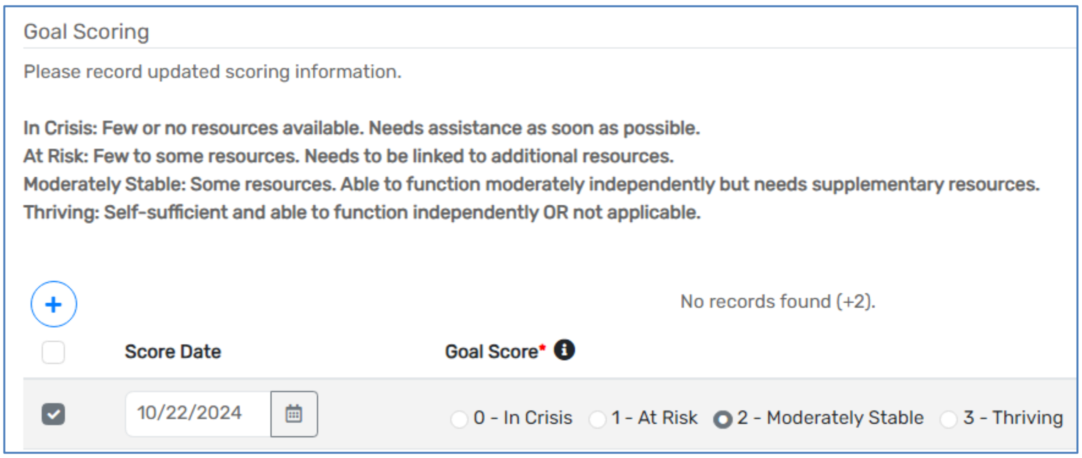
- In the ‘Strengths’ box, describe any current strengths the participant owns that would help them complete their goal. Strengths might include experiences, knowledge, skills, social connections, or access to resources that support the participant to achieve this goal.
- In the ‘Barriers’ box, describe any barriers that, if unaddressed, would keep the client from completing this goal.
- Keep the default option ‘Open’ for the ‘Status’ field. Keeping the status ‘Open’ means the participant is still working on an outcome. Changing the Status to ‘Closed’ means that the participant has finished or is no longer working towards this goal.



Goal Scoring

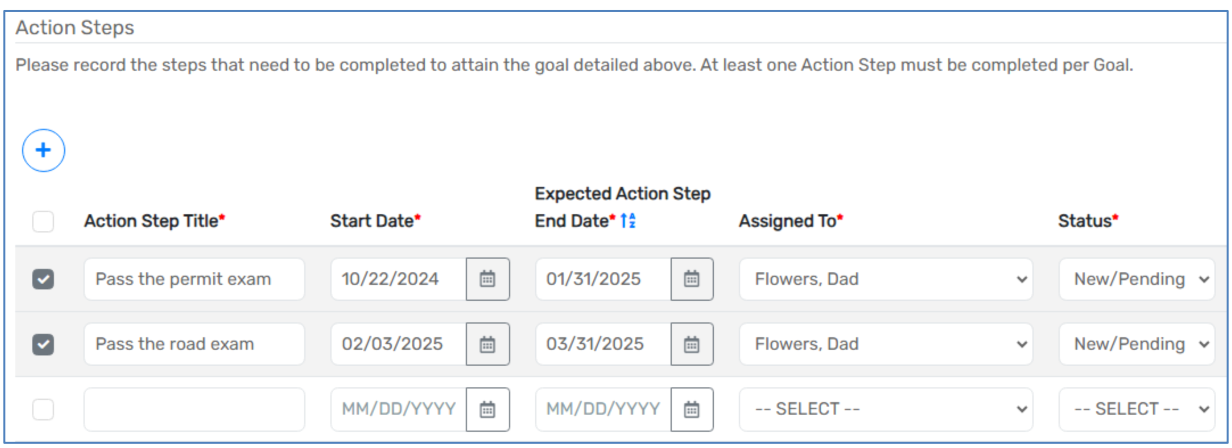
- Add the 'Score Date' and select appropriate value to assign to the 'Goal Score':

  0 - In Crisis: Few or no resources available. Needs assistance as soon as possible.
  1 - At Risk: Few to some resources. Needs to be linked to additional resources.
  2 - Moderately Stable: Some resources. Able to function moderately independently but needs supplementary resources.
  3 - Thriving: Self-sufficient and able to function independently OR not applicable.

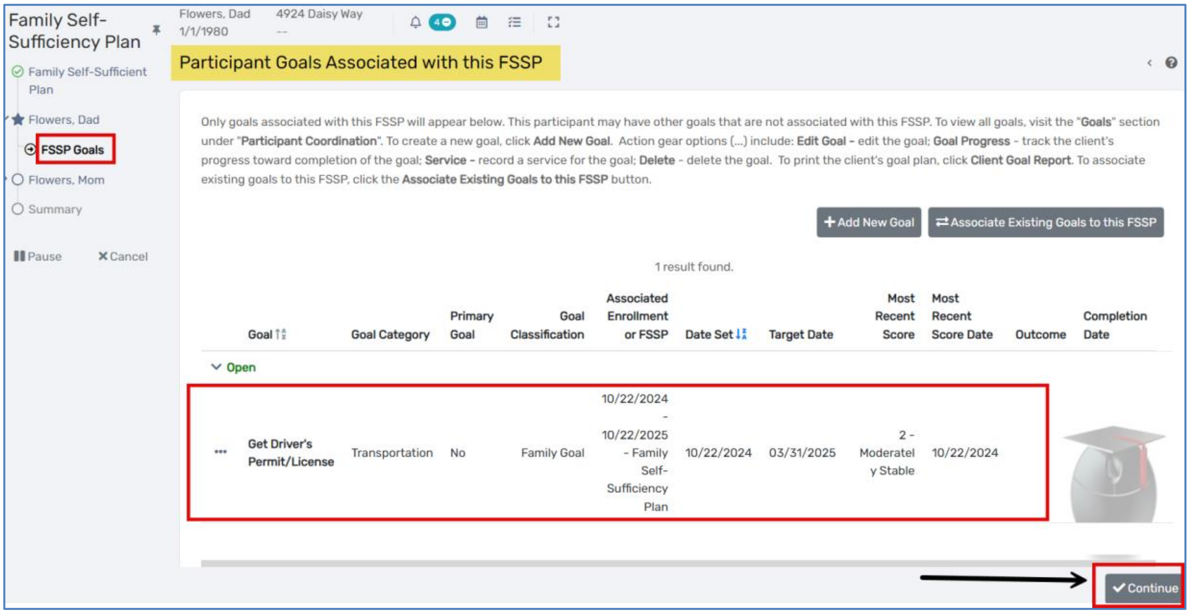


Action Steps

- *Add the 'Action Steps' that need to be completed to attain the goal detailed above. At least one Action Step must be completed per Goal.*



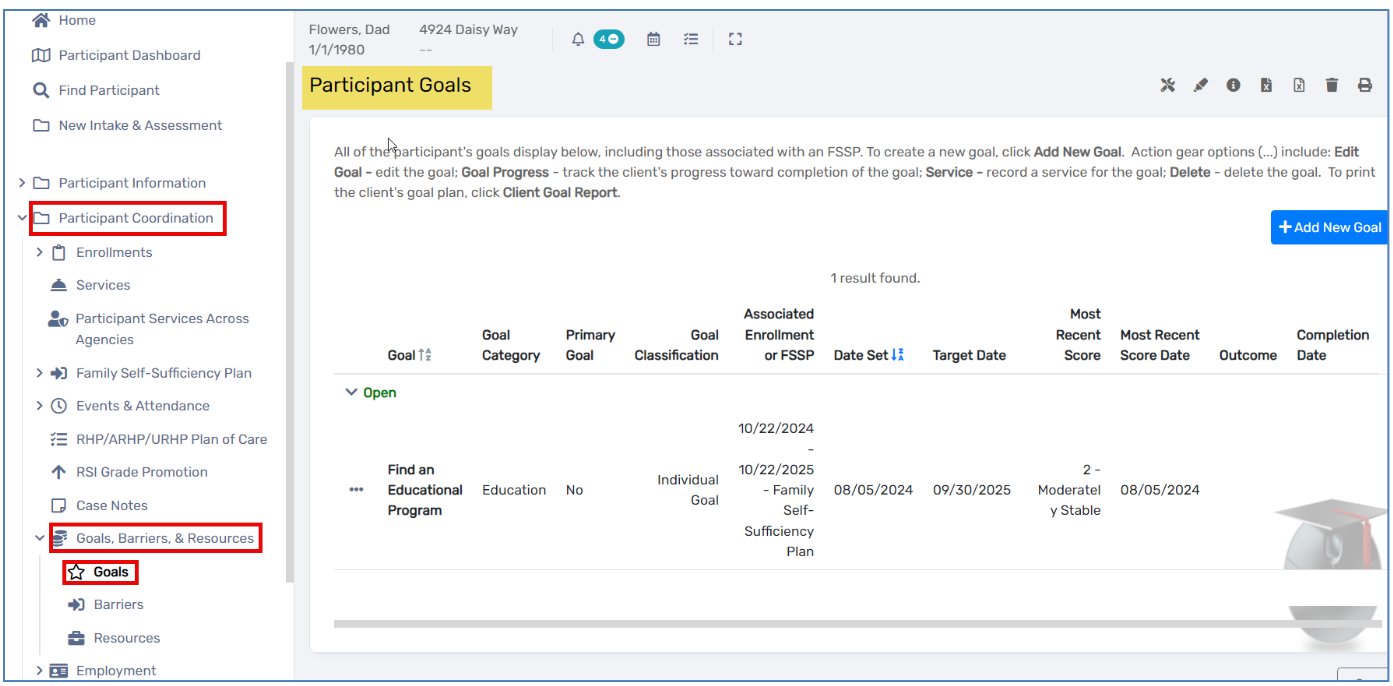
- *Click the 'Save' button at the bottom right of the screen to save the goal and return to the 'FSSP Goals' step/screen. The goal you just created will be listed.*



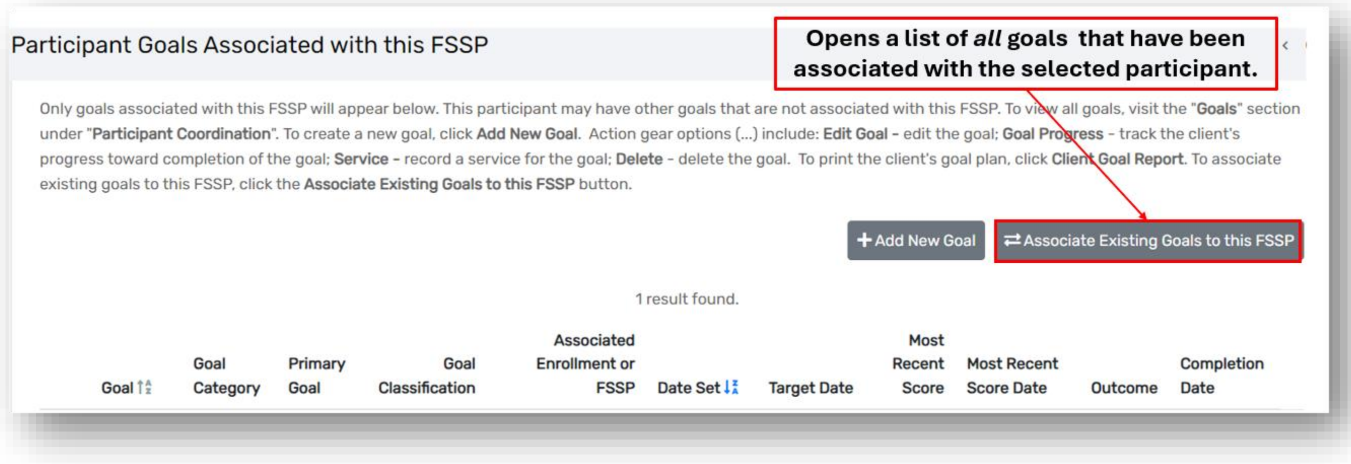
- *Click the* ***'Continue'*** *button at the bottom right of the screen to move to other family members where you can add new goals if needed, until you reach the* ***'Summary'*** *last step/screen.*

Associate Existing Goals to the FSSP

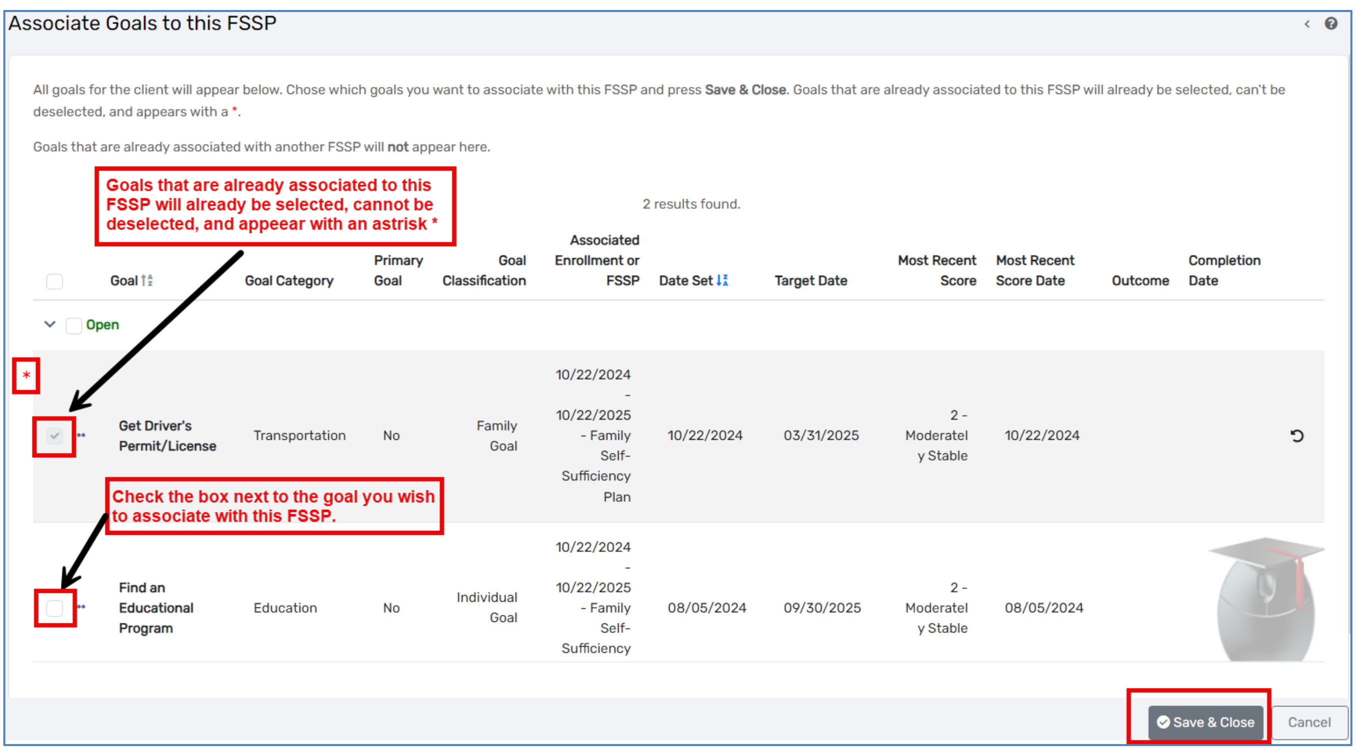
A participant may have other existing goals that were created and added in the system in the past for purposes other than the FSSP. Below where to add non-FSSP goals.



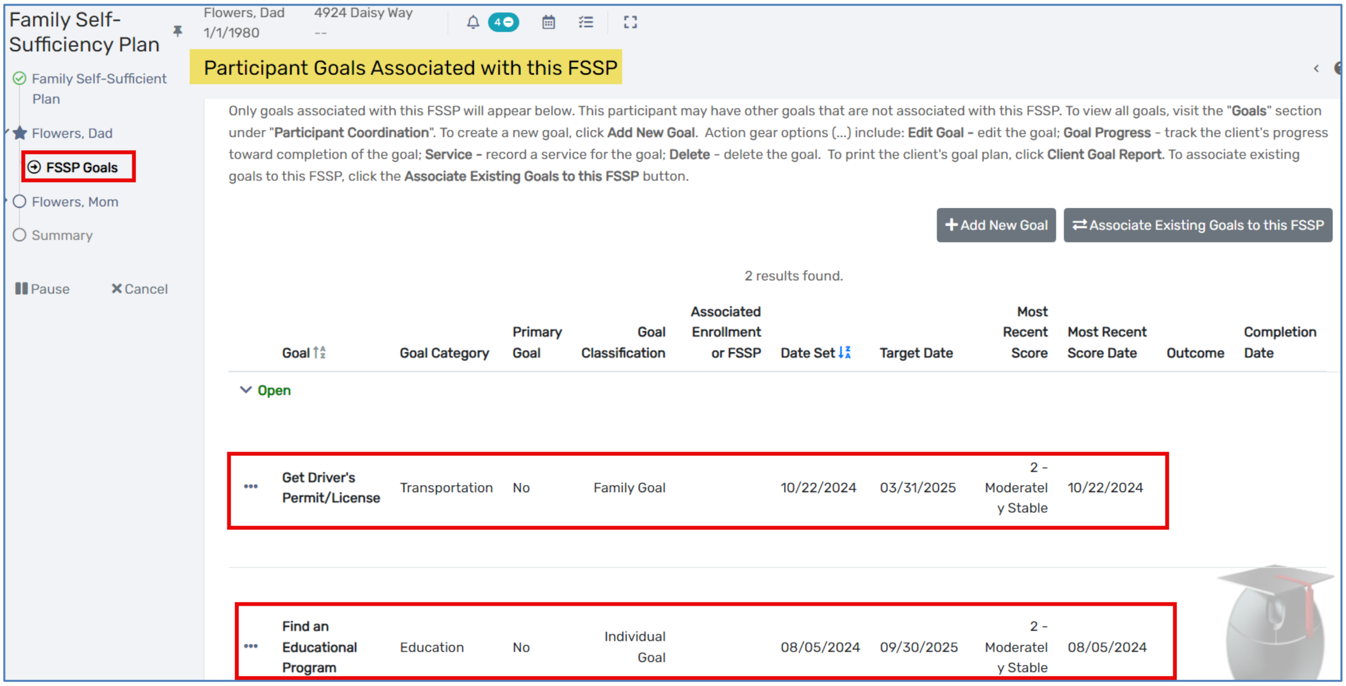
- Click the **'Associate Existing Goals to this FSSP'** button to associate existing goals to this FSSP instead of adding a completely new goal(s).



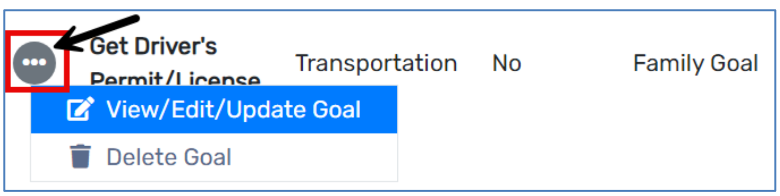
All goals for the participant will appear here except for any goals already associated with another FSSP. Goals that are already associated to *this* FSSP will already be selected and cannot be deselected.



- Check the box next to the goal you wish to associate with this FSSP and click 'Save & Close' button to return to the FSSP Goals screen where it shows both goals are listed.



- Click the ‘Continue’ button to proceed to the next step that shows the other family member’s goal(s) screen. Add new goals or associate existing goals as needed for each other family member(s).
- Click the action (…) button next to the specified goal to view, edit, or update an FSSP goal. Users may also delete a goal from this same action button.



- Once all goals for all family member(s) have been added for the FSSP, click the ‘Continue’ button to proceed to the ‘Summary’ step/screen.

FSSP Summary

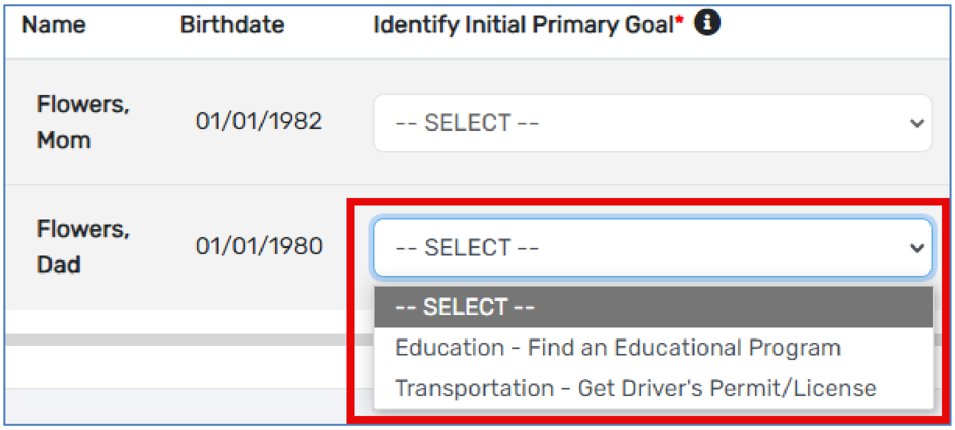
The last step/screen in the FSSP workflow is the Summary screen. If this process was for creating the FSSP (i.e. not for editing the FSSP record), the user will set the Initial Primary Goal and Program Referral for Initial Primary Goal in this ‘Summary’ step/screen. These two fields will no longer be editable once the record is saved. It is important to know that:

1. The Initial Primary Goal is the most important goal that each participant would like to complete, as self-reported at the time that the FSSP is first written. Initial Primary Goals are reported to ORR and **must be followed-up on 6 and 12 months after the first FSSP assessment date**. In order to comply with these federal reporting requirements, **an Initial Primary Goal cannot be edited once it is saved**, except by written request to the Bureau of Refugee Programs (BRP). Participants can have unlimited number of additional FSSP goals, and additional goals can be recorded in the FSSP at any time. Individuals who are enrolled in the RSS E&E program are required to have **"Employment"** as a Primary Goal.

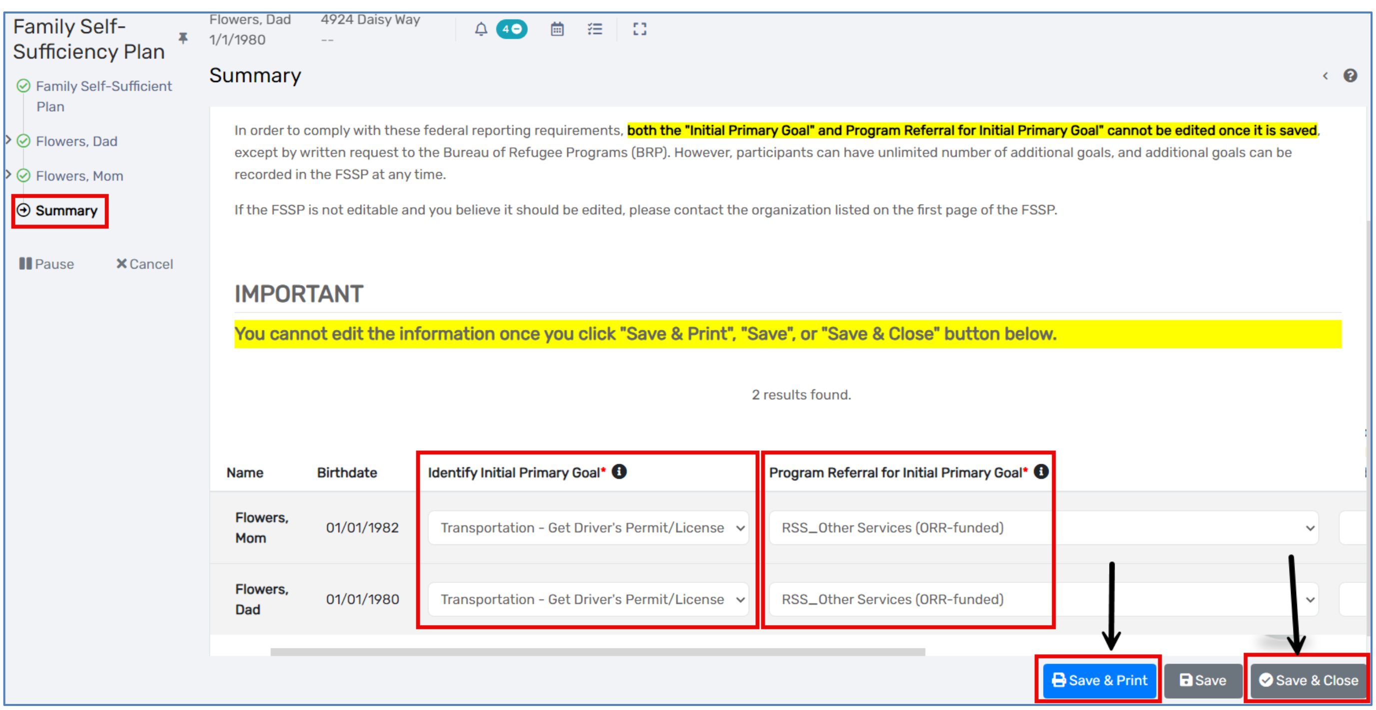
2. The Program Referral for the Initial Primary Goal is the program that the individual will be referred to in order to help them achieve their Initial Primary Goal. This can be a BRP-funded program that your agency delivers to the participant, a non-BRP-funded program that your agency delivers, or an outside program that you refer the participant to enroll in with another agency.

To complete the 'Summary' step:

- Select a goal for each family member from the 'Identify Initial Primary Goal' drop-down list.



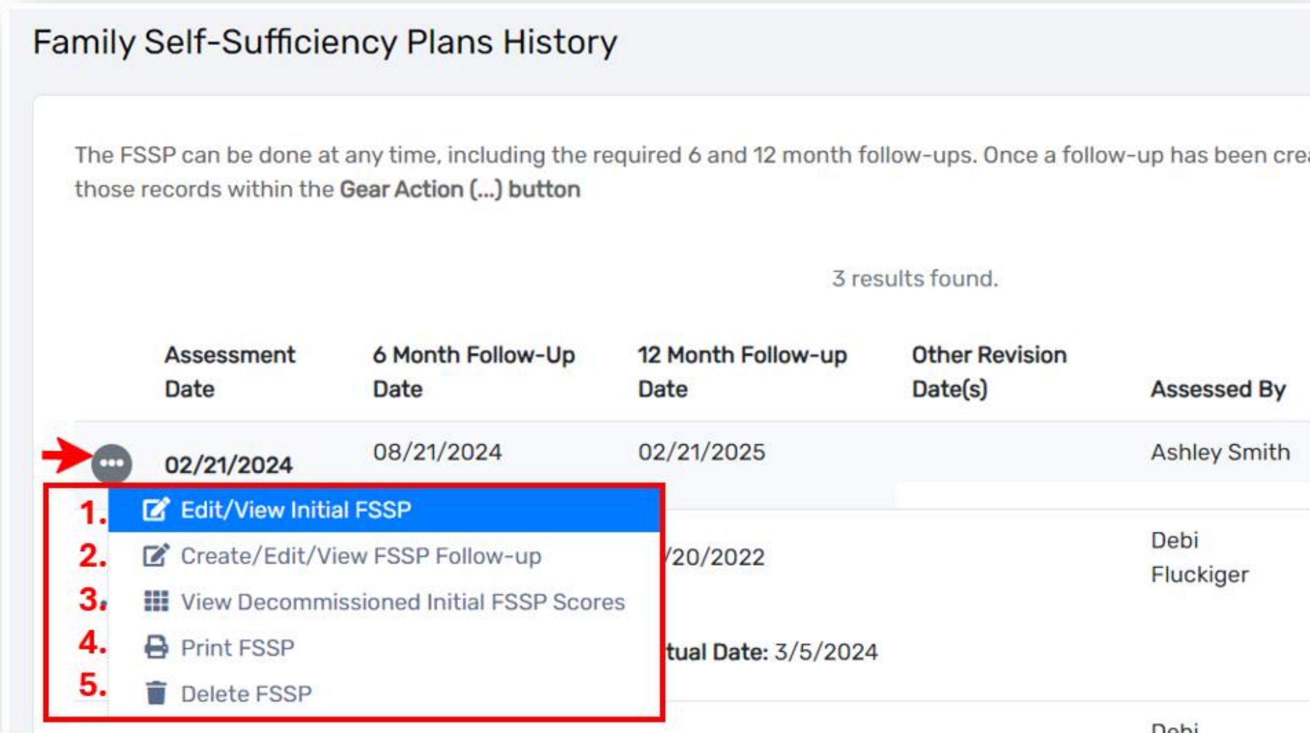
- Select a program for each family member from the 'Program Referral for Initial Primary Goal' drop-down list.
- Complete the 'Describe how the Referral for the Selected Program will be completed' field for each family member.
- Answer and select an option for the question 'FSSP Interpretation Provided?' if needed.



- Click 'Save & Print' button to save and print the whole FSSP or click 'Save & Close' to save and finish the FSSP workflow.

The FSSP Action Button

Once an FSSP has been created, users can perform different tasks by using the options listed under the action (…) button:



1- Edit/View Initial FSSP

Edit the initial FSSP including:

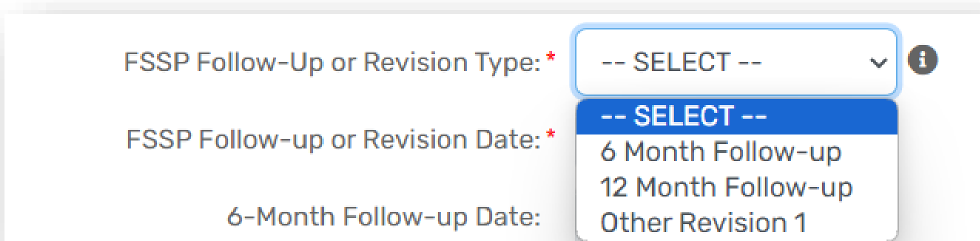
a. Add/Edit FSSP Goals (with the exception of the Initial Primary Goal, which cannot be altered after the initial record creation)

- Track progress towards the FSSP Goals
- Print FSSP Goals

b. Add/Remove Family Members to the FSSP

2- Create/Edit/View FSSP Follow-Up

If selected, the user will be redirected to the FSSP Follow-Up screen where they will be able to complete the appropriate follow-up based on existing records. Select the appropriate follow up type from the 'FSSP Follow-Up or Revision Type' field then proceed to complete the assessment.



3- View Decommissioned Initial FSSP Scores

Option will display in the action button menu if participant has FSSPs that were created/completed prior to 10/22/2024

4- Print FSSP

Allows user to print FSSP for sharing with the participant.

5- Delete FSSP

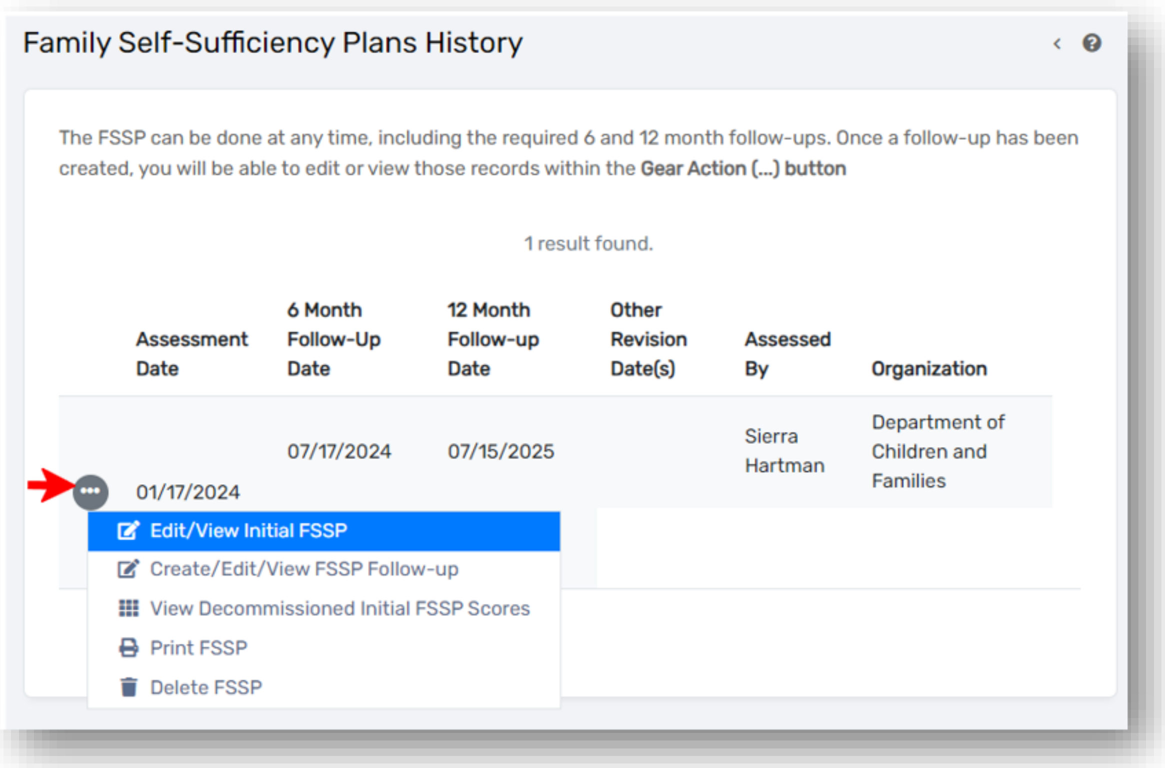
Delete the FSSP (user permission required).

Check for Existing FSSPs

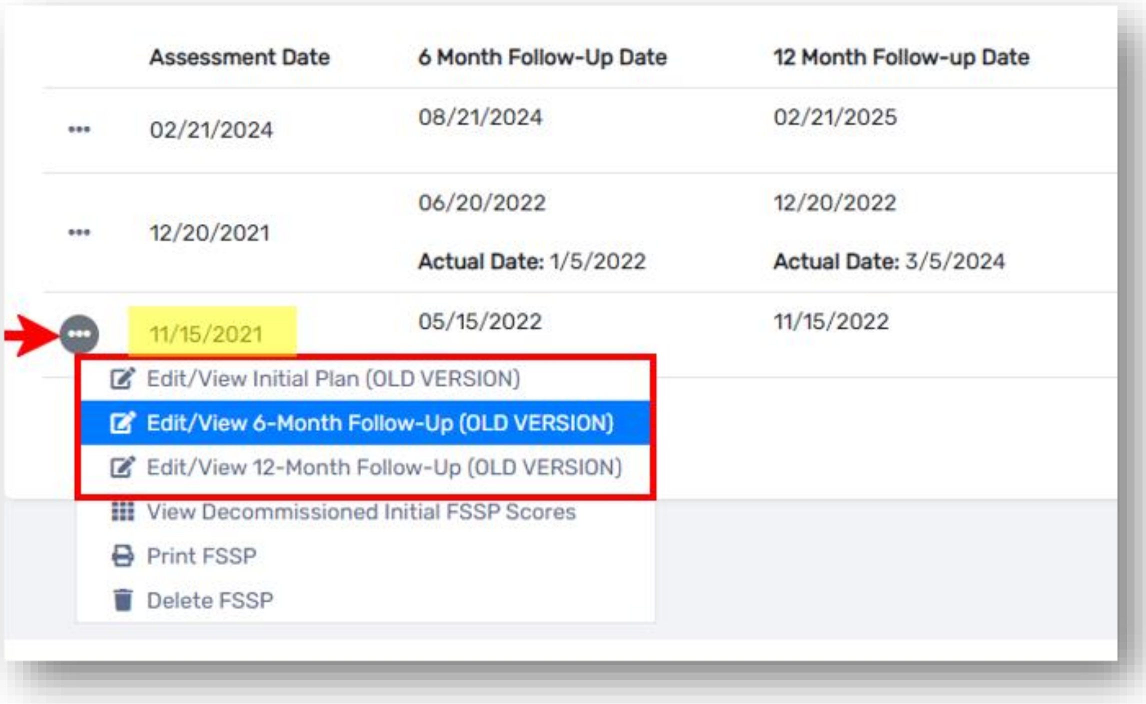
It is important to note that each Participant should only have ONE active open FSSP within 12 months of the FSSP Assessment Date (the date when the FSSP was created).

To check whether a participant has an FSSP, with the participant selected, navigate to the 'Family Self-Sufficiency Plans History' screen/form from ***Participant workspace > Participant Coordination > Family Self-Sufficiency Plan > FSSP***. This will bring up all FSSPs that have been created for the selected participant.

If a participant has an existing FSSP*, it will display here. Click the action button (…) to view or edit an existing FSSP or create a follow-up. If a participant has an active FSSP, you will not be able to create an FSSP because participants can only have one active FSSP at any given time.

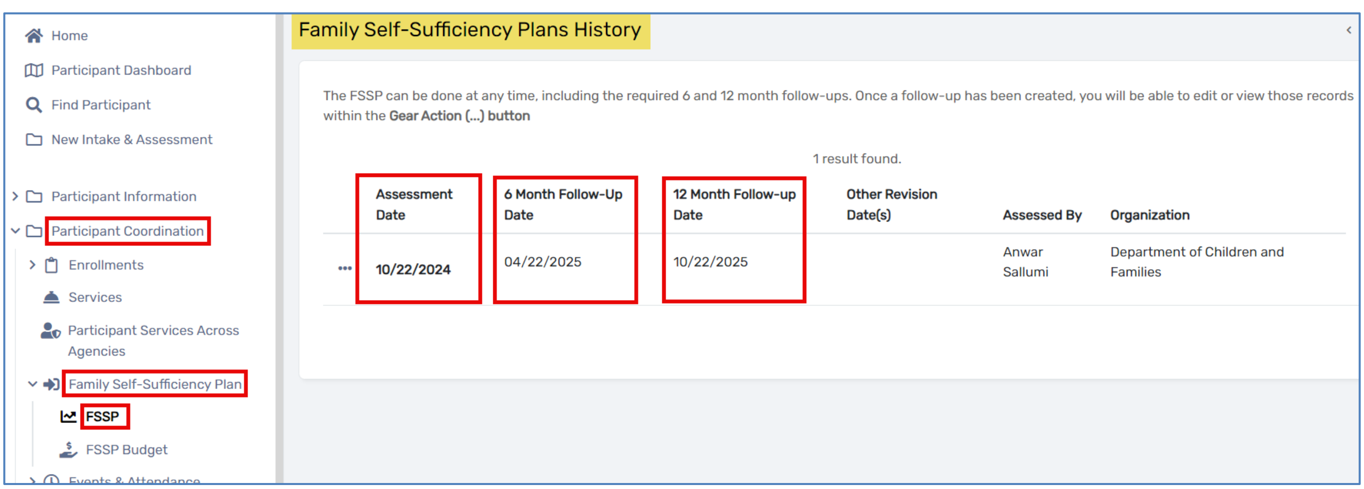


** For FSSPs with 'Assessment Date' prior to 10/22/2024, the action button menu will populate with the **OLD VERSIONS** of the Initial FSSP, 6-Month and 12-Month Follow-Ups. Proceed to select the appropriate option and complete the forms accordingly.*



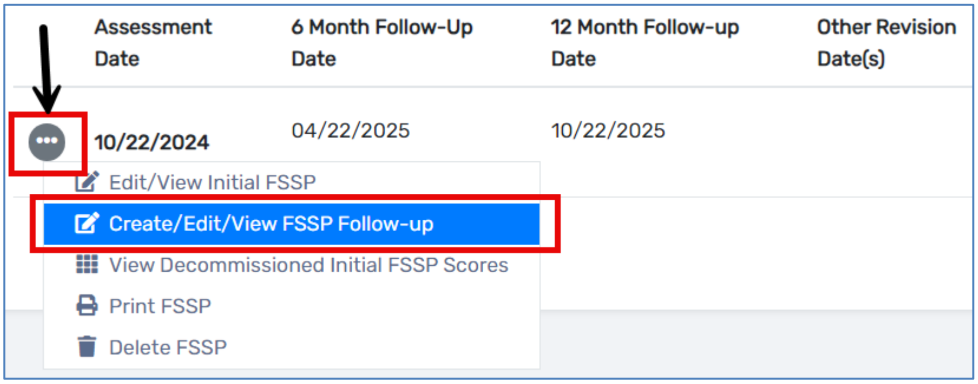
FSSP Follow-Ups: 6-Month, 12-Month and Other Revisions

Once an initial FSSP has been created, it will display for the selected participant under the 'Family Self-Sufficiency Plans History' form/screen which can be opened from ***Participant workspace > Participant Coordination > Family Self-Sufficiency Plan > FSSP***. The system auto assigns **6-month** and **12-month** follow up dates based on the date of the initial FSSP assessment. Those dates will display in the respective follow up date columns on the FSSP History screen.

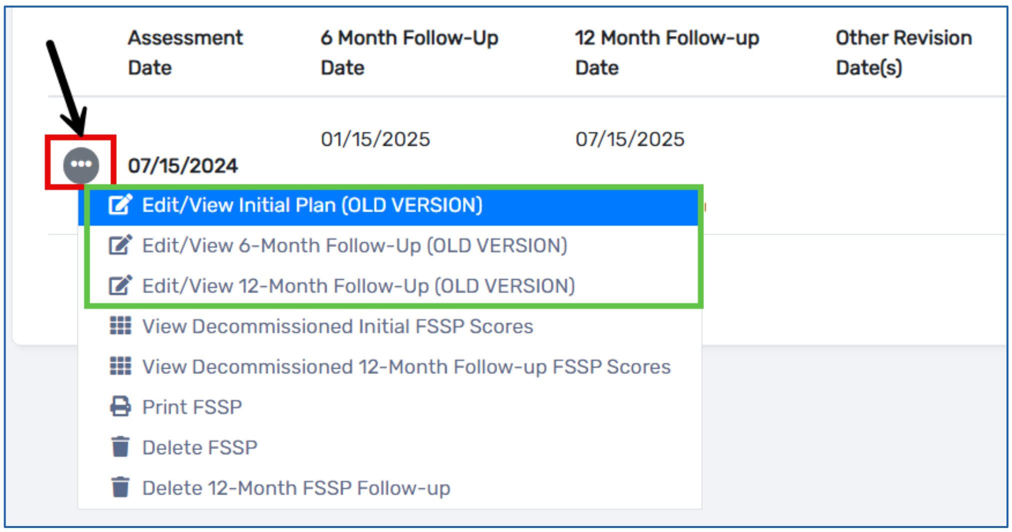


Create/Edit/View FSSP Follow-Up

To create/edit/view an FSSP follow-up, from the FSSP History screen, click on the action (…) button next to the associated FSSP. *



**Participants who have existing FSSPs completed prior to the FSSP redesign (i.e. 'Assessment Date is before 10/22/2024) will continue to use the OLD VERSION of FSSPs and the action button menu will look like the menu below.*

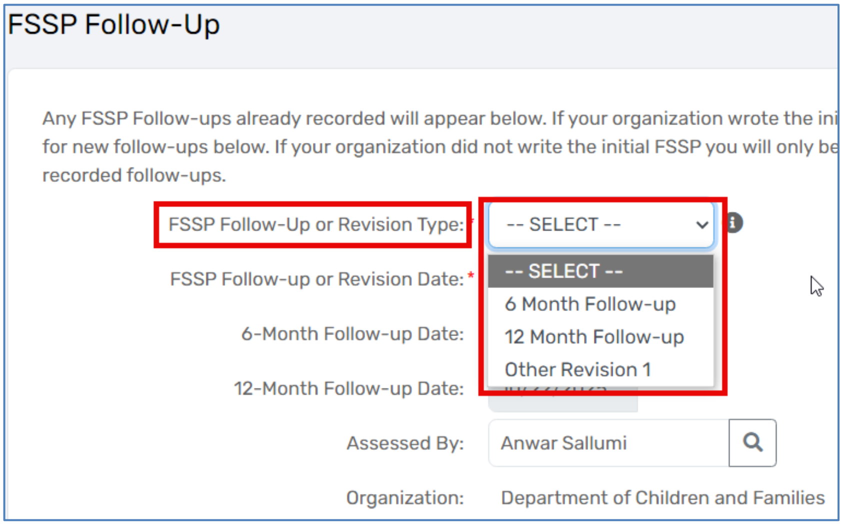


FSSP Follow-Up Screen

Based on the timing of the follow-up you wish to create, select the appropriate FSSP Follow-Up or Revision Type.

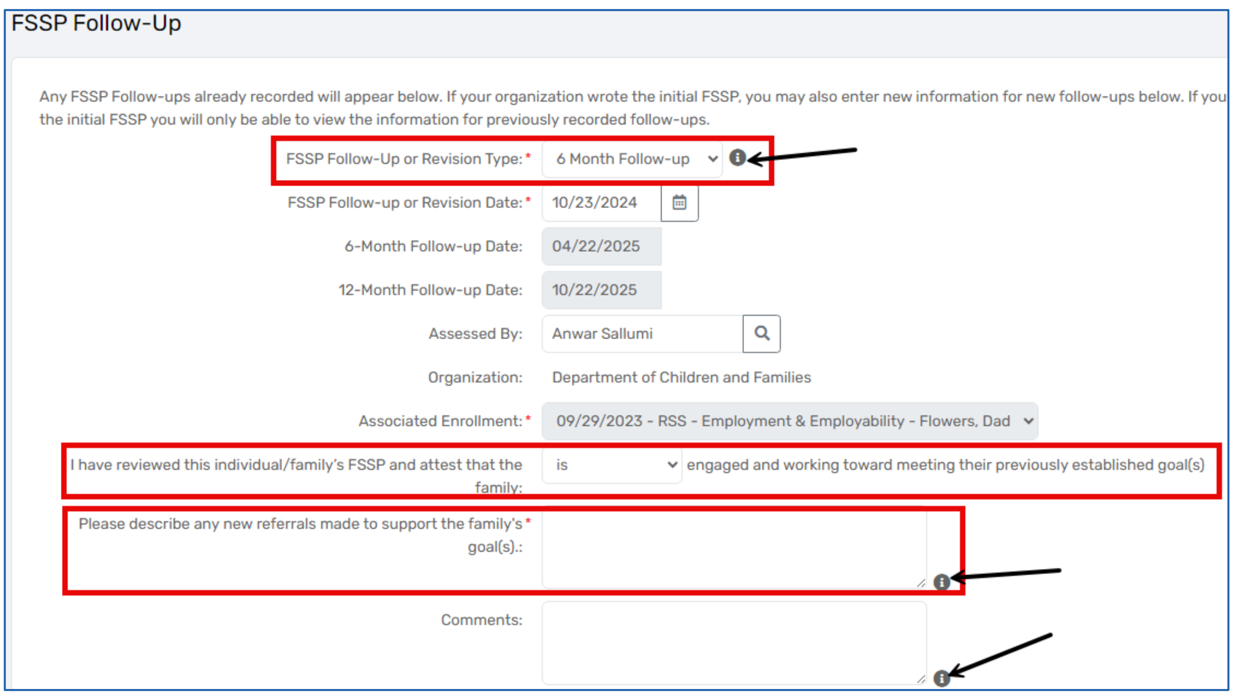
If there's a previously recorded FSSP Follow-up/Revision (e.g. 6 Month Follow-up, 12-Month Follow-up), then selecting it again will load data from previous Follow-up/Revision.

Other than the 6 Month & 12 Month Follow-ups, you can also add up to 10 Other Revisions to the FSSP. These are used if you need to make any other updates besides the 6 Month & 12 Month Follow-ups.



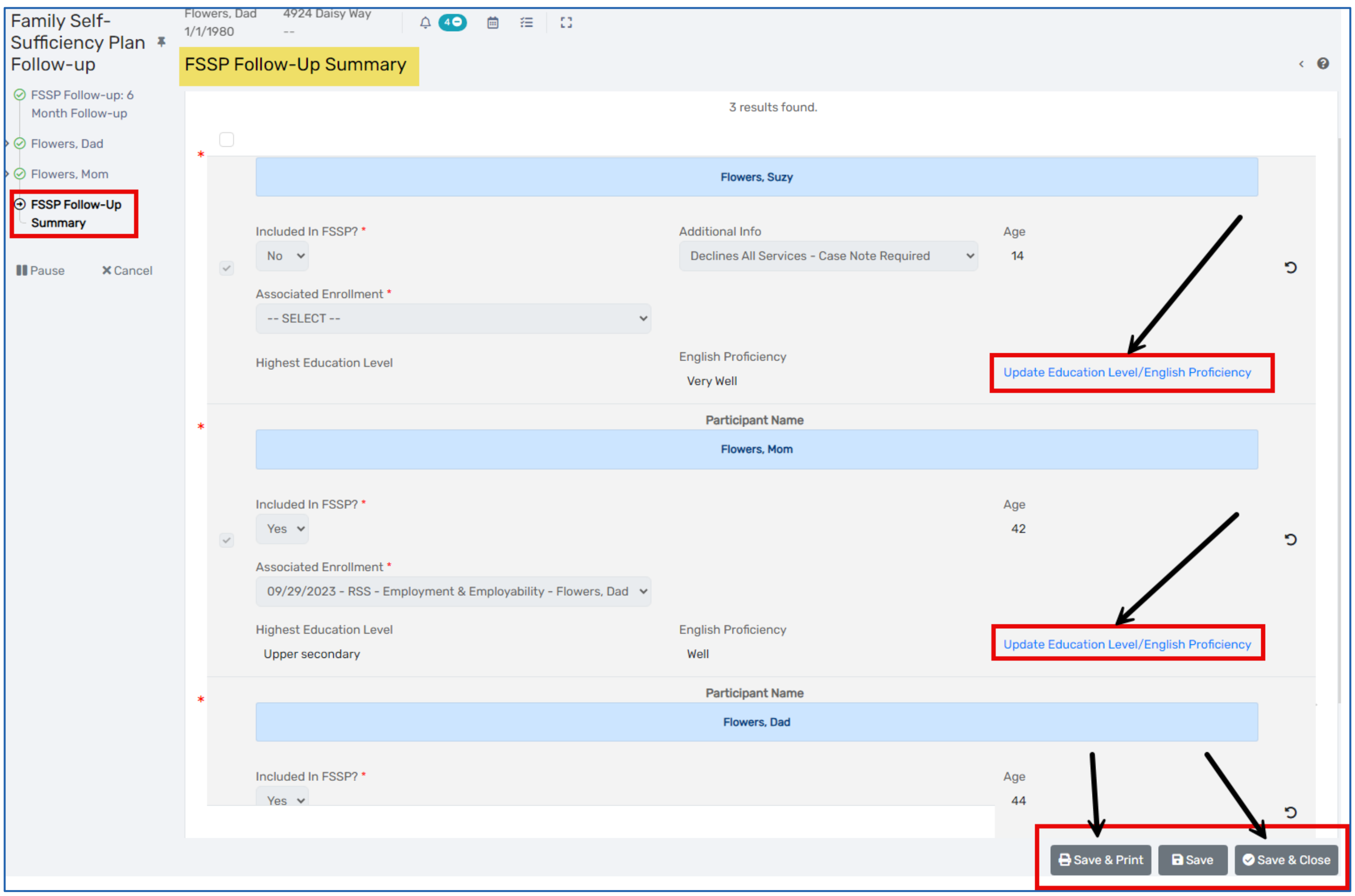
6 Month Follow-Up

- Select '6 Month Follow-up' option from the 'FSSP Follow-up Revision Type'. Once the Revision Type has been selected, complete applicable fields related to the selected follow up.
- Pay attention to some fields that may need to be changed/updated as needed, and also to complete all required fields.
- Hover over the information icon next to certain questions to understand what that information means, and to get more helpful information.



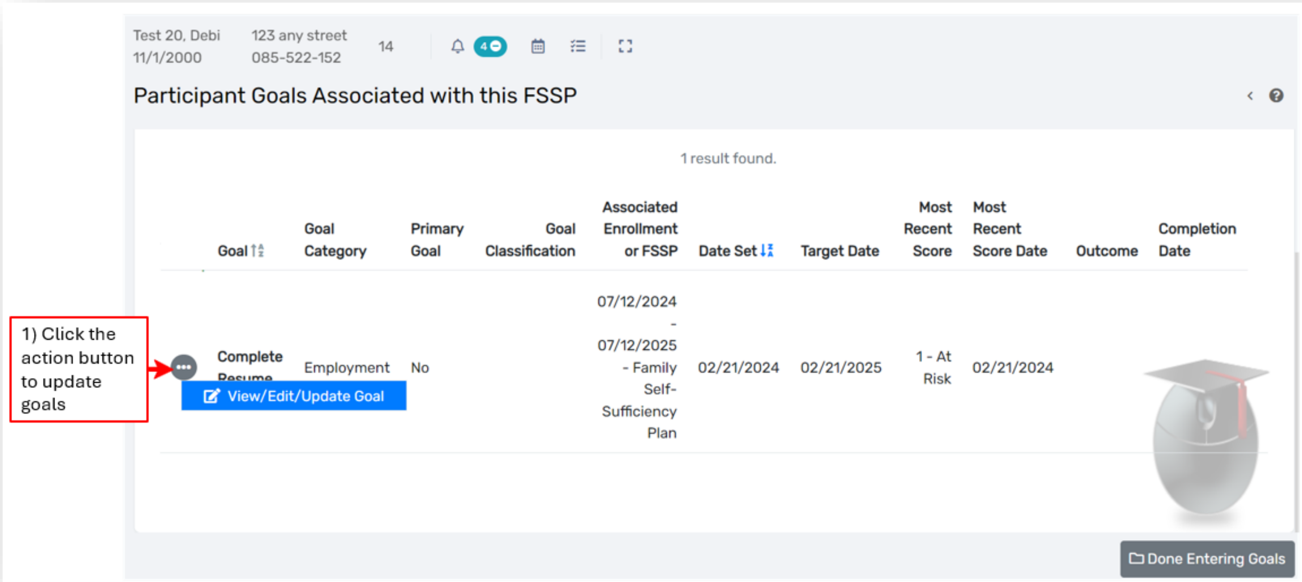
- Scroll down to the 'Family Members' section.
- Review all the prefilled information for each family member and verify that it is correct. Select each family member's enrollment associated with this FSSP. If a family member has no enrollments of their own, select the same enrollment as selected above, next to "Associated Enrollment".

- Click the 'Next' button to move to the next step which shows a family member's goals.
- Click the action button next to a goal to view, edit, or update it. A new goal can be added if needed. **IMPORTANT:** Check the **Updating FSSP Goals** section under the screenshot below to know about how to complete important steps of updating FSSP goals before moving to the following steps.
- Click the 'Done Entering Goals' button after completing the FSSP goals of the first family member to move to the other family members' goals. View, edit, update, or add goals if needed.
- Click the 'Done Entering Goals' button again to move to the 'FSSP Follow-up Summary' step/screen which is the final step in this '6 Month Follow-up' workflow.
- Review the info in the Summary fields about each family member.
- Use the available links to update information such as Education Level and English Proficiency.
- Once all information related to Family Members has been verified and updated as needed, click the 'Save & Print' to save and print the Follow-up information, or click the 'Save & Close' button.

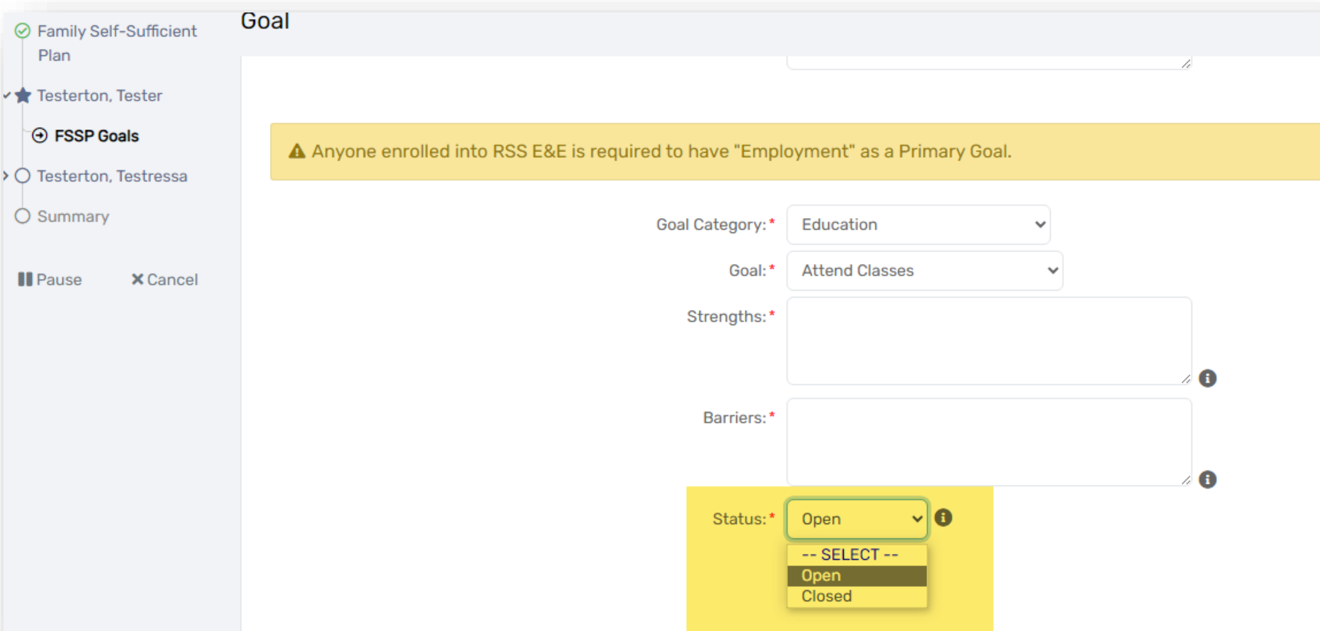


Updating FSSP Goals

It is important to review and update the Goals associated with the current FSSP for the selected family member. Click the action button to View/Edit/Update any of the goals. It is important to track the participant's progress toward completion of the goal.

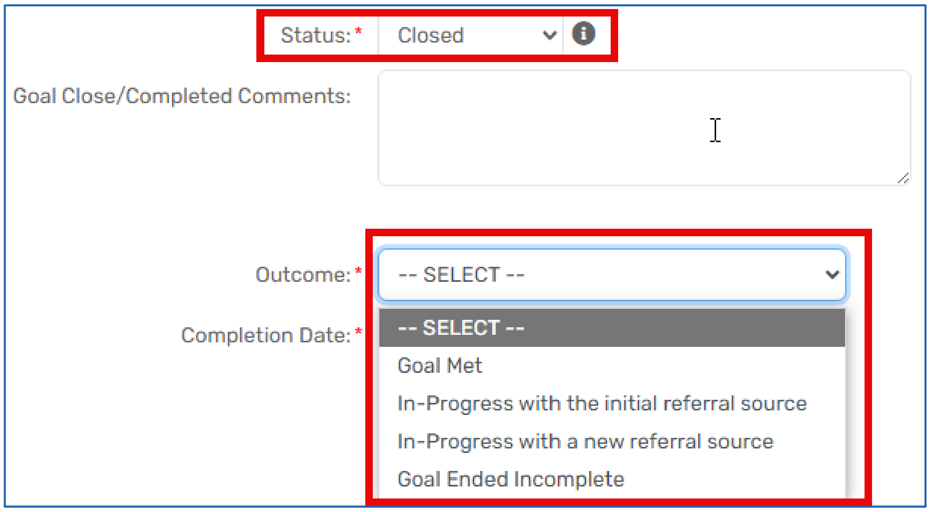


After clicking the 'View/Edit/Update Goal' from the action button on the FSSP goals screen, make any applicable updates including whether the goal's status is still "**Open**" or "**Closed**":

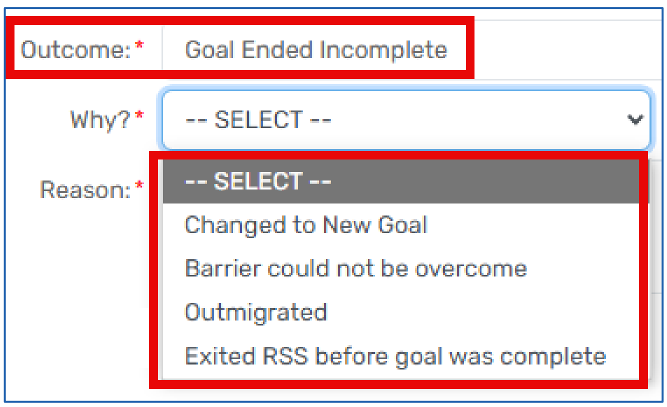


If the option 'Closed' is selected, new fields will be automatically added to the form.

- Add comments as needed about the closure or completion of the goal.
- Add the goal's 'Completion Date'.
- Select one of the options from the **'Outcome'** drop-down list.

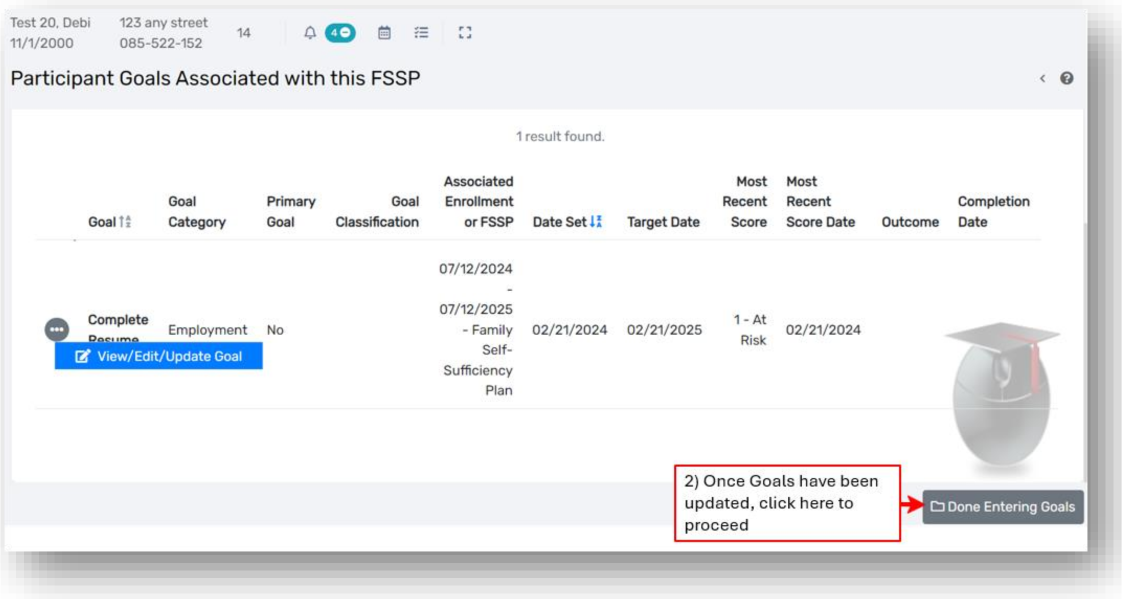


- If the option 'Goal Ended Incomplete' is selected for the 'Outcome' field, more new fields will be automatically added and should be completed.



- Update the 'Score Date' and the 'Goal Score' to reflect the current status of the 'Goal Scoring' section.
- Update the 'Status' and the 'Actual Action Step Completion Date' fields in the 'Action Steps' section.
- Once the goal is updated, click the 'Save' to return to the 'FSSP Goals' step/screen.

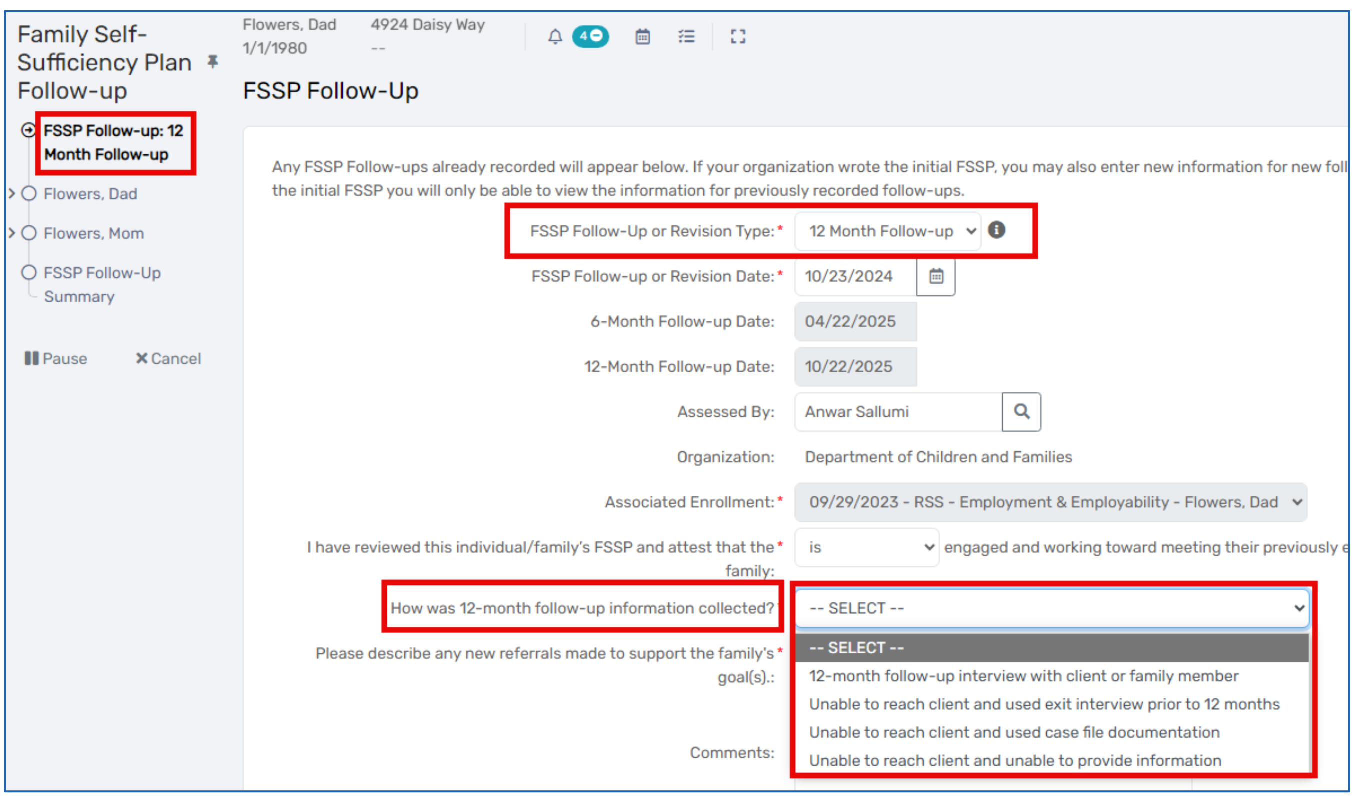
Repeat this process for each goal associated with the FSSP. Once you are done making updates to goals for that family member, click on 'Done Entering Goals' to proceed and repeat this process for each associated member of the family.



12 Month Follow-Up

The 12 Month Follow-Up can be completed by following the same process for completing the 6 Month Follow-Up with more fields and questions to be completed and answered:

- Select an option/answer from the 'How was the 12 Month Follow-up data collected?' drop-down list.



- Click the 'Next' button to move to the next step which shows the first family member's FSSP Goals. Update the goals the same way as in the 6 Month Follow-Up process.

- Click the 'Done Entering Goals' button after completing the FSSP Goals of the first family member to move to the other family members' goals. View, edit, update, or add goals if needed.
- Click the 'Done Entering Goals' button again to move to the 'FSSP Follow-up Summary' step/screen which is the final step in this '12 Month Follow-up' workflow.
- Review the info in the 12 Month Follow-Up Summary fields about each family member.
- Make sure that the question 'Was the Initial Primary Goal Met?' was already answered and listed. This will be automatically populated from the 'Outcome' answer after updating the goals and making its Status as **"Closed"** in the previous step. If the goal and its Status were not updated and the 'Outcome' question was not answered, the warning message "Goal is still Open, please Close the goal and select and Outcome" will be listed in this field instead.
- Use the available links to update the Education Level and English Proficiency or to Add New Employment Information.
- Once all information related to Family Members has been verified and updated as needed and required, click the 'Save & Print' to save and print the Follow-up information, or click the 'Save & Close' button to save and finish the 12 Month Follow-Up workflow.