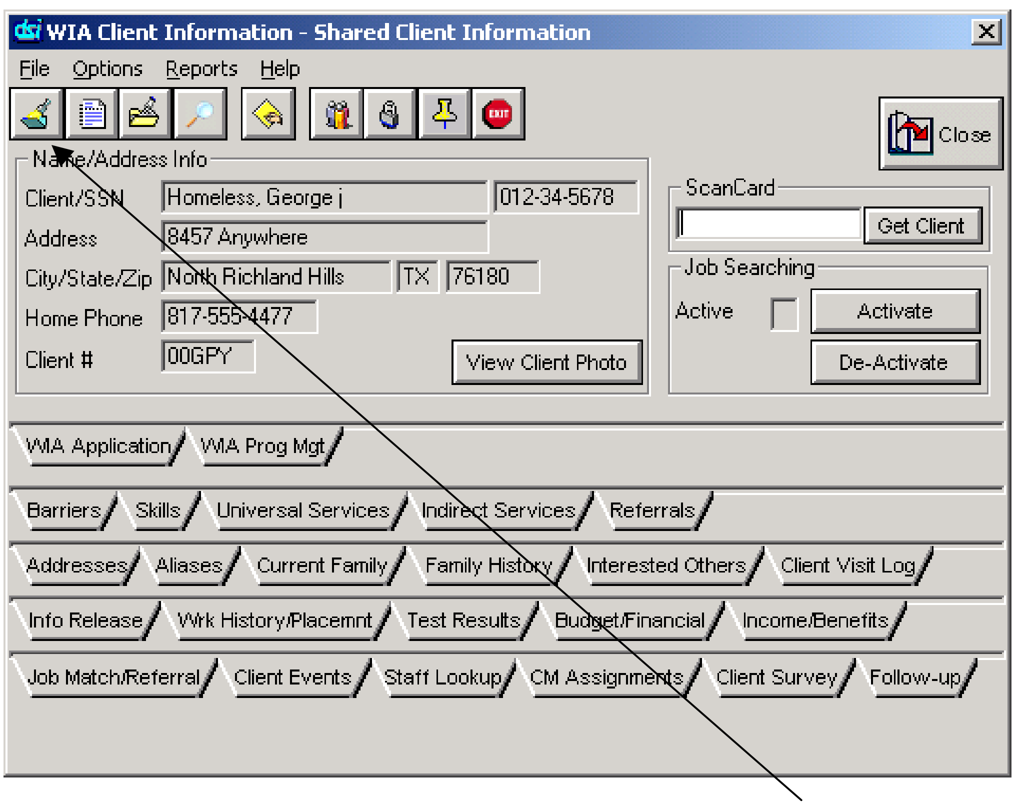
COMMON CASE MANAGEMENT

Looking up Client Information

In ClientTrack, most processes start from the Shared Client Information screen, where you will first check to see if a client exists in the database. From the Shared Client Information screen, you can open an existing client's basic information file to edit, or you can add information under any of the tabs. Alternatively, from the Shared Client Information screen you can start a new client file. To look up an existing client:

1. In the toolbar of the Shared Client Information screen, click Lookup (flashlight icon).
2. In the Client Name box, type some or all of your client's last name and then click Find. You will see a list of all clients in the database with that last name. The most common look up is by Social Security Number. Type the number in the box and then click Find.
3. Select the appropriate client, and click OK to access that client's file. You can also double-click the record to open it.
4. If you need to add or change information for the client, or see if her enrollment is active, you can do it now that her file is open.

Tip: Remember that ClientTrack is organized around the Client. So always check to make sure you have the correct client file loaded before you begin working.



Editing existing client info overview

After you have located an existing client's file, the client's name and address information will appear on the Shared Client Information screen. From this screen you can either open the Edit Table -Client Info screens to edit basic client information, or you can click any of the tabs on the Shared Client Information screen to continue further processing of the client. One piece of information you might change in the basic client info file is the client's address. To change an existing client's address:

1. After you locate a client file, from the Shared Client Information screen, in the toolbar, click Edit (file folder icon).
2. In the Mailing Address box, type the new address. When you change an address here, a record of the client's prior address is automatically logged into the Addresses list screen under the Addresses tab.
3. In the Zip Code Locate box, type the new zip code or look up the zip code.
4. Make any other appropriate changes on Page 1 and Page 2 and Save.

Note: Always make address changes here. Adding a new address in the Addresses tab will not change the current client address. Entering an address in the Addresses tab records the address as a past address.

Note: Changing the address on an existing Application, or using a different address on a new Application does not change the current client address, nor does it add the address to address history.

Creating a new client file

We are now ready to start a completely new client file. If your client has family members, you will create a family account. With ClientTrack, you can associate clients with families and even keep track of family changes with a historical listing. The family group account number is automatically generated. In this family group you can add other clients who are family members or other family members who are not clients, such as children. You **do not** have to create a family account unless tracking service to families. To create a new client file:

1. In the toolbar of the Shared Client Information screen, click New to create a new client file.
2. ClientTrack automatically assigns Client ID's to new clients. This number appears in the lower right corner of the new client screen, Edit Table-Client Information.
3. In the Soc Sec No box, type the client's social security number (SSN) without dashes. ClientTrack will add dashes for you. It is OK to include dashes, but you can save keystrokes by leaving them out.

4. When you tab to the empty Family Acct box, the look up icon in the toolbar will activate indicating this is a look up field. If you are entering a client and his or her family for the first time you will need to create the Family Account:

NOTE: When you add the Family Acct number to the client file, ClientTrack automatically uses the Family information to fill in the Mailing Address box and Home Phone box in the new client file.

5. In the Name boxes, type your client's Last and First names and Middle initial.
6. In the Birth date box, type your client's birth date.
7. In the Gender box, select the appropriate gender.
8. ClientTrack will calculate and fill in the Age boxes based on the birth date.
9. In the Marital Status box, select the appropriate marital status of the client
10. Page 2, complete primary language, education, housing, veteran status.
11. Place a check in the boxes that apply for pregnancy, limited English, driver’s license, active job search.
12. Complete Race/Ethnicity by pulling down the combo box.
13. Complete citizenship. If client is an non-citizen, enter country of origin, date entered US and alien identification number.

Release to specific organizations

If you want to allow other organizations besides your organization to have access to a client's files, but you don't want to release to ALL organizations, you will have to create a specific organization information release.

To release a client's files to specific other organizations

1. From the client's Shared Client Information screen, click the Info Release tab.
2. In the toolbar of the Information Release screen, click New.
3. In the Org ID box, type or look up the appropriate organization, then select Yes to Release the information, and then select Yes or No, depending on if you have a Signature On File from your client to allow the release.
4. Click Save-Add New if you want to add another organization, or Save-Close if you are finished.
5. The new organization will show up on the Information Release screen. You can change the release status by clicking the Release or Do Not Release buttons in the Info Release Options area. You can also change the Signature Status by clicking either the Signature on File box or the No Signature on File box. Notice the Release and Signature status for the record changes to reflect your choices by showing a Y for Yes or an N for No.
6. Alternatively, you can copy all organizations into the release screen by clicking the Copy Organizations button at the top of the screen. This may be helpful if you have several organizations to which you want to release the information, but you want to restrict release to only one or two of them. Instead of going in and adding them one by one, as indicated above, you can simply copy all organizations, then highlight or select the record you want to restrict and change the release status by clicking the Do Not Release button.
7. Remember, you can also release to all organizations by selecting the Rel to All Orgs check box on the basic Client Info screen.

Recording work history and job placements

Recording work history involves first making sure the employer is in the ClientTrack database. You will look up the employer name from the Employer box. If the employer is not listed in the ClientTrack database, you will have to add the employer from the Employer tab on the Administration screen. To record employer information:

1. From the Shared Client Information screen, click the Wrk History/Placemnt tab.
2. In the toolbar of the Work History/Placement screen, click New.
3. Click in the Employer/ID box, then in the toolbar click Look up.
4. Select the employer, and click OK. This will fill in the address and phone information associated with this employer. To add an employer information file:
    1. Click Lookup to see if an employer already exists, and if it doesn't, click New in the toolbar of the Locate Employer screen.
    2. The Edit Table- Employer or Add Record-Employer is divided into two pages. On Page 1 in the Employer area, type the correct Name and DBA and select the appropriate Status.
    3. In the Street Address area, type the street address and look up the zip code. The Street Address info will also fill in the Mailing Address area. If the mailing address is different, make the appropriate changes.
    4. In the Telephone area, type the Voice and Fax phone numbers and Web Address.
    5. Click the Page 2 tab.
    6. In the Industry Information area, type the Fed Tax ID number.
    7. If the industry has an SIC Code, type it or look it up. *This is an optional field.*
    8. In the Business Desc box, type a description for the business.
    9. In the Participation area, select the appropriate level of participation and whether the Employer has a previous relationship with your organization.
    10. In the Contact Info area, select the organization through which you got this contact. And select a Contact Person, if there is one.
    11. Click Save-Close.
5. In the ONET Code box, type the appropriate ONET code or look up the ONET code.
6. In the Employer ID box, type the appropriate employer ID.
7.

To record job information

After you record the employer information, you will identify the specifics of the client's work history for that employer.

1. On the Work History/Placement screen, in the Classification box, select the appropriate choice indicating full or part-time employment, self employed or volunteer.

2. In the Job Title box, type the client's job title at this employer.
3. In the Start Date and End Date boxes, record the appropriate dates. Note, if the client is still working at this place of employment, do not include an end date.
4. In the Hourly Wage and End Wage boxes, type the client's beginning hourly wage and ending hourly wage with no dollar signs, and with two decimal places, e.g., 8.00 for $8.00/hour. If you include a dollar sign, ClientTrack will reject the data.
5. In the Avg Wkly Hrs box, type the average hours per week the client worked at that job up to one decimal place.
6. Based on the Wage and Weekly Hours information you just entered, ClientTrack will automatically calculate the Start Annual salary and End Annual salary.
7. Finally, in the Contact Person and Phone boxes, type the name of the appropriate contact person at that employer.

Note: If this is a job placement, be sure to record it on Page 2 of the Work History/Placement screen

- To record a job placement
    0. Click on Page 2 of the Work History/Placement screen.
    1. In the Placement Info area, select the appropriate placement choices. You can select all of these if they all apply to this placement.
    2. In the Place Type box, select the appropriate Placement Type.
    3. In the Placement Staff Info area, look up the codes for Place Staff, Place Location, Agency and the Fund Source, giving credit to the appropriate sources.

Evaluating client barriers

Because the services you will provide are determined by the barriers your client has, it is important to record the barriers before you get started on the goals and activities. This is also the place where you will record sensitive issues like addictions and health problems. You can record as many barriers as you need to for your client. Each barrier will list as a separate record on the Barriers list screen, and you can open these records at any time to edit the existing barriers. The barrier sets are organized from the broad category of barrier evaluation type to the specific barrier evaluation code. The type of barrier in the Barrier Eval Type box will always be B. The type of Barrier Group you select from the Barrier Group box will determine your choices in the Barrier Eval Code box. To add new client barriers:

1. From the Shared Client Information screen, click the Barriers tab.
2. From the Client Barriers Eval screen, in the toolbar, click New.
3. If this barrier is confidential to your organization, select the Restrict to Org check box.
4. In the Barrier Eval Group box, select an appropriate category of barrier.
5. In the Barrier Eval Code box, select the appropriate code for the barrier.
6. In the Status box, select the appropriate choice. You can leave this blank.
7. In the Date Identified box, the default date is the date the record is entered into ClientTrack. If you need to change it, type the date the barrier was identified.
8. If you are following up on a barrier, in the Result Code box, select the appropriate choice, and in the Date Resolved box, indicate the date the goal was attained.

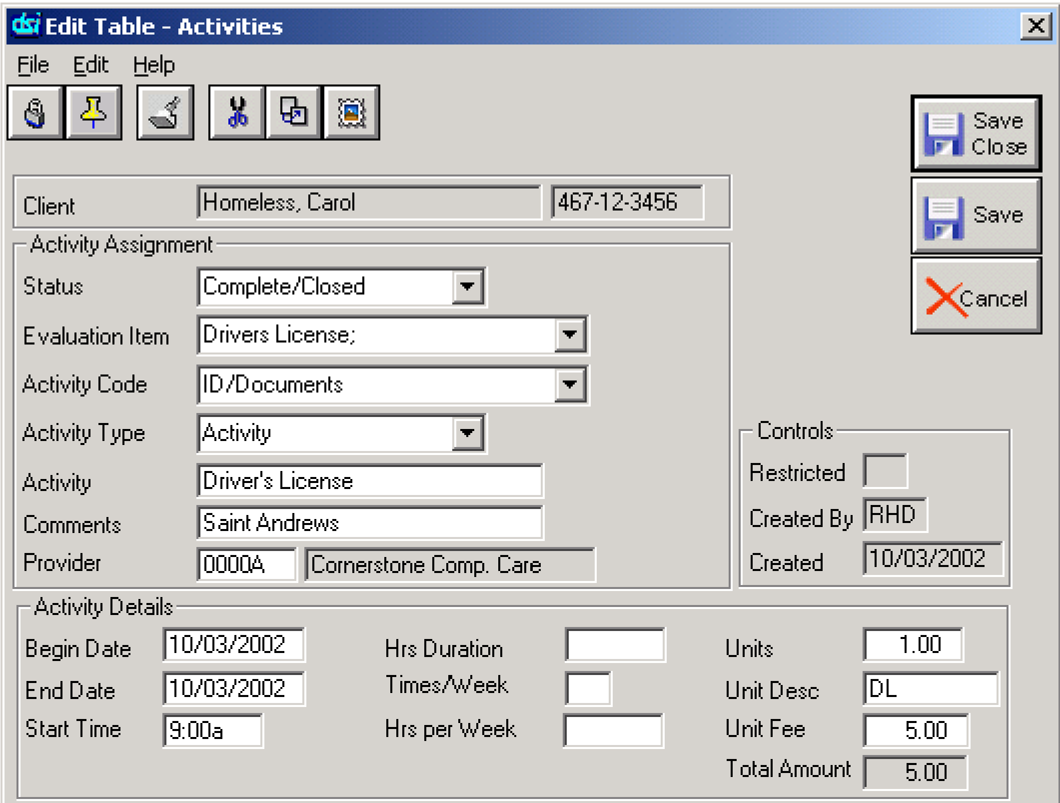
9. The Explanation box is a place for you to type a brief description or explanation for the barrier, or why the barrier was not resolved.
10. In the Staff ID box, your ClientTrack user ID is entered by default. If you need to change it, type or look up the user ID of the Staff person who recorded the barrier.
11. If you have more barriers to add, click Save-Add New. If you are ready to close, click Save-Close. Notice when you finish adding barriers, they will appear on the Client Barriers Eval list screen.

Evaluating client skills

Although skills may not be specific application requirements, it is important to evaluate client skills before you use ClientTrack to job match. Also, evaluating client skills will help you determine the appropriate services to provide your client. You can record as many skills as you need to for your client. Each skill will list as a separate record on the Client Skills screen, and you can open these records at any time to edit the existing skills. The skill sets are organized from the broad category of skill type to the specific skill code. The type of skill you select in the Skill Type box will determine your choices in the Skill Group box, which will in turn determine your choices in the Skill Code box. To evaluate client skills:

1. From the Shared Client Information screen, click the Skills tab.
2. From the Client Skills screen, in the toolbar, click New.
3. In the Skill Type box, select the appropriate type for this skill. Remember your choice here will determine your choices in the Skill Group box below.
4. In the Skill Group box, select an appropriate subcategory group for this skill type.
5. In the Skill Code box, select the appropriate code for the skill.
6. In the Mths Experience box, type the number of months the client has experience using this skill.
7. Select Attained Thru Pgm if the the skill was attained through a program.
8. The Explanation box is a place for you to type a brief description or explanation for the skill.
9. In the Staff ID box, type or look up the user ID of the Staff person who recorded the skill.
10. If you have more skills to add, click Save-Add New. If you are ready to close, click Save-Close.

Universal Services



To record services not attached to a grant, use the Universal Services tab. Record your additional services for non-grant or match services. Example: NEED East Report.

To create a Service Plan click on the New Record button (white paper) at the top left hand corner of the screen. The Activities screen opens up. Fill out the Status of the service, the Evaluation Item (barrier), Activity Code (service), Activity Type (normally Activity), Activity (hand typed description of services), Provider (your organization), and Begin Date of service. Click on the Save Close button, when you are finished with the service plan.

CASE NOTES: All client activities/meetings can be recorded in case notes.

1. Click on the document icon (yellow paper) on the toolbar.
2. Click on the New icon (white paper) to add a record heading.
3. Type the heading in the regarding line.
4. Click Save and Close button.

5. Highlight the record heading in the listing box. Click on Create/Edit document button. This will open a text editor (like Wordpad). Type all activities for the client

Identifying interested others

Your client's may have interested others who you may want to be able to contact. For example, you may want to be able to reach your client's doctors, guardian, parole officer or other relatives. This field can be used to record Emergency Contact Information. To identify interested others

1. From the client's Shared Client Information screen, click the Interested Others tab.
2. In the Description box, select the appropriate description of this interested other. For example, if the person is the client's doctor, select Physician.
3. In the Other/Comments box, type any description that you need.
4. Complete the screen by filling out the Address and Phone information as you have it or as it is appropriate to the situation.

Exiting Clients/Services

When services are completed or a client leaves a program, you need to add end dates and data to the appropriate screens. You will do this by going to each screen and editing the record you created on entry with the Edit button (yellow folder). Make sure to enter all ending data, such as End Date, Status, etc. The attached checklist should help you find all the screens you will need to enter said data.

Services Check List

Barriers

- ☐ Fill out a Barrier Assessment for all Barriers targeted ________
- ☐ Choose the Evaluation Group (barrier category) ________
- ☐ Choose the Evaluation Code (barrier) ________
- ☐ Choose the appropriate status ________
- ☐ Enter the date the barrier was identified ________

Services

- ☐ Create a service plan in Universal Services for services rendered ________
- ☐ Choose the appropriate status ________
- ☐ Choose the Evaluation Item (barrier) served by the Service Plan ________
- ☐ Choose the appropriate Activity Code (Service Plan) ________
- ☐ Click on Activity for the Activity Type field ________
- ☐ Type out the description of the Service in the Activity line ________
- ☐ Choose your organization as the provider ________
- ☐ Enter the Begin date of the service ________

Exit

- ☐ Place an End Date and change status to Complete on the appropriate service plan in Universal Services ________
- ☐ If Barrier is "Resolved," complete Barrier Assessment with proper Result Code and Date Resolved. ________

Client Name: ____________________ Social Security: ____________________
Case Manager: ____________________ Exit Date: ____________________

For any questions, please contact:

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