

## Creating a WtW application

ClientTrack has split the WtW Application fields up into three screens and pages.  
To create a WtW application

1. From the WtW Client Info -Shared Client Information screen in the WtW module, click the WtW Application tab.
2. In the toolbar of the WtW Application screen, click New to create a new application.
3. In the Application Dt box, type the application date. Note that this date must be before or the same as the current date.
4. ClientTrack will have automatically filled in the client's address and phone information. Check this information for accuracy for purposes of the application.
5. In the GEO Code box, type the appropriate GEO code. This field is optional.
6. Click on Page 2 to continue completing the WtW application information.

### Creating a WtW application - Page 2

- To record a client's TANF information for the WtW application
  1. Click on the Page 2 tab of the WtW Application screens.
  2. In the No. Dependents box, type the number of WtW dependents for this client.
  3. In the TANF Case No box, type the client's TANF case number.
  4. In the Non-Cust Parent box, select the appropriate choice if the client or parent is receiving TANF.
  5. In the Non-Cust Status box, select the employment status of the non-custodial parent.
  6. From the check boxes in the TANF Information area, select the appropriate choice or choices for the status of the TANF relief. You may choose all options that apply.
  7. If no ethnicity was selected when the client was first entered, in the first Ethnicity box, select an appropriate ethnicity choice.
- To record a client's Education information for the WtW application
  1. In the Education Info area, type the appropriate Reading Grade Lvl and Math Grade Lvl between 0.1-16.9, 88.0, 99.0.
  2. In the Highest Grad Comp box, type the highest grade completed by the client.
  3. In the Educ Status box, select the appropriate education status for the client.
  4. In the checkboxes, select whether the client is a school dropout, received his or her GED, or has limited English abilities. You may select all of these that apply.
- Click on Page 3 to complete the WtW application

### Creating a WtW application - Page 3

- To record additional information for the WtW application
- Click on the Page 3 tab of the WtW Application screens.
  1. In the Additional Info area, indicate any and all situations which apply to the client. Select the check box if the situation does apply to the client.
- To indicate a client's eligibility and ethnicity for the WtW application
  1. Click on the Page 3 tab of the WtW Application screens.
  2. In the Eligibility box, select the client's eligibility provision.
  3. In the Ethnicity box, select an appropriate ethnicity choice.
- To identify the interviewer and reviewer
  1. In the Interviewer box, type or look up the ID of the person completing this form.
  2. In the Interview Date box, type the date this form was completed.
  3. In the Reviewer box, type or look up the ID of the person certifying proper eligibility has been determined.
  4. In the Review Date box, type the date the eligibility was reviewed.
  5. Click Save-Close, Save or Save-Add New if you want to create a new application after saving this one.

## **Saving a Welfare to Work application**

To save a WtW application

- Click Save, Save-Close or Save-Add New if you want save and create another application for this client right away.

Some field verification errors will not allow you to save an application. When you save a WtW application, ClientTrack will check for WtW requirements.

Note: You will be able to save applications that have field verification errors if the errors are not restrictive.

## **Processing a WtW Application**

After you create a new WtW application for your client, you will need to process it.

- Verifying a WtW application checks to make sure the required fields have been entered.

To verify a WtW application

1. From the client's WtW Client Info - Shared Client Information screen, click the WtW Application tab.
2. Select the WtW application you want to verify, and in the Processing Options area, click Verify Application.

3. If verify failed you will get a message explaining which fields you need to address. Click OK, and open the application to edit those fields.
  4. When you have finished changing the appropriate fields, save the WtW application, and click Verify Application again. If you have adequately addressed the field errors, you will get a Verification Passed message.
  5. Once a verification has passed the Status field on the WtW Application screen indicates this with an A.
- Certifying a WtW application indicates that the application has been certified and is ready to submit.
    1. From the client's WtW Client Info - Shared Client Information screen, click the WtW Application tab.
    2. Select the WtW application you want to certify, and in the Processing Options area, click Certify Application.
    3. If verify failed you will get a message explaining which fields you need to address. Click OK, and open the application to edit those fields.
    4. When you have finished changing the appropriate fields, save the WtW application, and click Certify Application again.
    5. Once a certification has passed the Status field on the WtW Application screen indicates this with a C.
  - Voiding an application voids the application.
    1. From the client's WtW Client Info - Shared Client Information screen, click the WtW Application tab.
    2. Select the WtW application you want to void, and in the Processing Options area, click Void.
    3. In the WtW Application tab, the application will now have a "V" for Void under Status.
  - Note: Void an application when you want to indicate the application is no longer being processed, but you don't want to delete the record of it.

Note: You can change the status of an application any time by selecting it and clicking the appropriate button.

## **Printing a WtW application**

1. From the client's WtW Client Info - Shared Client Information screen, click the WtW Application tab.
2. Select the WtW application you want to print, and click the Print Application button. ClientTrack will generate the hard copy of the application as a report.
3. In the toolbar of the report screen, click the Print button to print, click the Printer Setup button to set up the printer, or click the Export button to export to a .pdf file.

## Creating a WtW enrollment

To create a new WtW enrollment

1. On the WtW Client Info - Shared Client Information screen, click the WtW Program Mgt tab to get the WtW Enrollment screen.
2. In the toolbar of the WtW Enrollment screen, click New.
3. On the Edit Table-Enrollment screen, select the Assessed check box, if the client has been assessed for Welfare to Work eligibility, then in the Assess Date box, type the date of the assessment. The assessment date must be before or the same as the created date. The created date is the date you are entering this information in ClientTrack.
4. In the Enroll Date box, enter the enrollment date the client first began receiving services. The enrollment date must be after or the same as the current date.
5. In the Enroll Code box, select whether this is a new, returning or concurrent enrollment.
6. In the Program Type box, select the program in which the client is enrolling.
7. In the Grant Code box, select the appropriate enrollment grant.
8. In the Yr of Apptmnt, type the year of the apportionment for these grants.
9. In the Agency area, look up the agency providing this intake/eligibility.
10. In the Staff ID area, look up or type the staff person responsible for this enrollment, then in the Date Signed box, type the appropriate date.
11. You can use the Remarks box, type any remarks on the enrollment.
12. Click Save-Close.

## Recording WtW activities

Note: You have to create a WtW enrollment before you can set up WtW activities.

To assign WtW activities or actions

1. From the client's WtW Client Info - Shared Client Information screen, click the WtW Prog Mgt tab.
2. In the WtW Enrollment screen, select the appropriate enrollment record, and click the Activities tab.
3. In the toolbar of the WtW Activities screen, click New.
4. In the Begin Date box, type the beginning date for this activity.
5. The Program Type and Grant Code boxes will be automatically filled in from the enrollment screen.
6. In the Reporting Date box, type the date this activity was provided. This date must be before or the same as the current date.
7. In the Agency Code box, look up or type the code for the agency providing the service.
8. In the Agency box, type your agency's code or look up the code.
9. In the Provider box, look up the code for the provider of this activity. Remember to leave this field blank for youth, customized training or OJT enrollments, as it does not apply.

10. In the Job Code box, look up the code that best describes the training provided. Remember basic skills, work readiness and GED will not have a job code. This is an optional field.
11. In the Completion Code box, select the code that best describes the completion status of this activity.
12. In the Est End Date box, type the estimated or actual end date for the activity.
13. In the ITA Amt Used box, type the cumulative dollar amount expended from the ITA for this activity if it was an ITA activity.
14. Click Save or Save-Close. After you save and close you may want to click the Submit to MIS button to submit this activity.

## **Setting up WtW work placements**

If you have a work placement for a client enrolled in WtW, you must tie the placement to a specific WtW enrollment for it to be a WtW placement. ClientTrack allows you to tie already entered work placements to a WtW enrollment, or to enter new work placements as tied to WtW enrollments.

To tie an existing work history to a specific WtW enrollment

1. From the WtW Client Information screen, click the WtW Program Mgt tab, and then select an enrollment and click the Enroll Work History tab.
2. On the WtW Employment Record screen, click on the Wrk History/Placement tab, then highlight or select the employment record you want to tie to the WtW enrollment, and on the toolbar, click Open.
3. In the Case No box, select the Enrollment to which you want to tie this employment record, then click Save-Close.
4. In the Work History/Placement screen, click Close. The record will now be listed in the Employment History area on this WtW Employment Record screen.

## **Creating a new WtW placement**

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.

Note: If you do not have access to the ClientTrack Administration screen, adding an employer is probably something for which your manager or system administrator is responsible.

- To create a new work placement tied to a specific WtW enrollment
  1. From the WtW Client Information screen, click the WtW Program Mgt tab, and then select an enrollment and click the Enroll Work History tab.
  2. On the WtW Employment Record screen, click on the Wrk History/Placement tab, then click New in the toolbar.

3. In the Case No box, select the Enrollment to which you want to tie this employment record, then in the Date Empld box, type the date the client was employed.
  4. In the Employer box, look up or type the appropriate Employer ID, then click on the Page 2 tab to continue entering the work placement.
- To record employment information
    1. Click on the Page 2 tab of the Work History screen.
    2. In the Job Code box, look up the appropriate ONet code.
    3. In the Job Title box, type the client's job title at this employer, and in the Job Desc box, type a short description of the job.
    4. In the Classification box, select the appropriate choice indicating full or part-time employment.
    5. In the Hrs Per Week box, type the average hours per week the client worked at that job up to one decimal place.
    6. In the Hourly Wage box, type the client's beginning 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. ClientTrack will automatically calculate the client's annual salary in the Annualized box, based on the wage and weekly hours information.
    7. In the End Date box, indicate the appropriate dates. Note, if the client is still working at this place of employment, do not include an end date.
    8. In the End Wage box, type the client's ending wage. ClientTrack will automatically calculate the client's ending annual salary in the End Annual box.
    9. In the Hrly Wg Subsdy, type the amount of hourly wage subsidy, if any, then in the Sector Type box, select the appropriate subsidized type.
    10. Select the Concurrent Employment, Fringe Benefits and Non-Traditional Employment check boxes, if any of these apply.
    11. Go to Page 3 if this job is a placement. If it is not, click Save.
  - To indicate a job placement
    1. Click on Page 3 of the Work History screen.
    2. In the Placement Info area, select the appropriate placement choices. You can select all of these if they all apply to this placement.
    3. In the Placement Staff area, look up the codes for Place Staff, Place Location, Agency and the Fund Source, giving credit to the appropriate sources.

## **Processing a WtW exit**

To process a WtW exit

1. From the client's WtW Client Info - Shared Client Information screen, click the WtW Program Mgt tab.
2. From the WtW Enrollment screen, select the appropriate enrollment from which you want to exit and click the Exit tab.
3. In the Agency Cd box, type or look up the agency if the terminating agency is different than the agency who created the enrollment.
4. In the Term Code box, select the termination code that indicates the reason for this termination.
5. In the Term Date box, type the date of the termination, and then select the Increased Wages check box if the client is being terminated with an increase in wages.
6. In the Staff ID box, look up or type the staff ID number of the staff who processed the exit, and then in the Date Signed box, type the date the staff person completed the form.
7. In the Remarks box, type any additional remarks regarding the termination

## **Printing a WtW exit**

To print a WtW exit form

1. From the client's WtW Client Info - Shared Client Information screen, click the WtW Program Mgt tab, then select the application whose exit you want to print.
2. In the menu bar of the WtW Enrollment screen, click Forms and select Exit. ClientTrack will generate the hard copy of the exit as a report.
3. In the toolbar of the report screen, click the Print button to print, click the Printer Setup button to set up the printer, or click the Export button to export to a .pdf file.

## **Processing a WtW Follow-up**

To process a WtW follow-up

1. From the client's WtW Client Info - Shared Client Information screen, click the WtW Enrollment tab.
2. From the WtW Enrollment screen, click the Follow-up tab.
3. From the WtW Follow-up screen, click New.
4. In the Follow-up Type box, select the appropriate choice to indicate the type of follow-up.
5. In the Follow-up Date box, type the date the follow-up takes place.
6. In the Agency box, type or look up the agency conducting the follow-up.

7. If there is an interview, in the Interview Date box, type the date the interview takes place. The interview date must be on or after the follow-up date.
8. In the Follow-up Result box, select the appropriate result.
9. In the Labor Force Status box, select the appropriate choice that best describes the employment situation of the client at follow-up.
10. In the Follow-up Staff box, type or look up the staff person responsible for completing the follow-up form.
11. Click on the Page 2 tab to complete the follow-up.

## Processing a WtW Follow-up - Page 2

### To record employment-related follow-up information

1. Click on the Page 2 tab of the Edit Table- Follow-Up screen.
2. In the Weeks Employed box, type the number of weeks the client has been employed during the follow-up period.
3. Select the Employed at All check box, if the client is employed either full or part-time.
4. In the Actual Hours Worked box, record the actual number of total hours including overtime the client worked during the follow-up period.
5. Select the With Same Employer check box, if the client is still employed with the same employer as was reported at the time of exit.
6. Select the Wage Increase check box, if the client's wages show an increase at the time of follow-up.
7. In the Wg Increase Amt, type the amount the client's wage has increased, if it has increased.
8. The Date Employed box will already be filled in. In the Employer No box, select the employer with whom the client is employed. The employers in this list box come from the Work History/Placement tab. The rest of the screen will automatically be filled in by ClientTrack.

Note: You must have selected the Employed at Follow-up box on Page 1 of the WtW Follow-up screen in order to select an employer here.

Tip: If the client is employed with a different employer than at exit, you should record the client's new employment in the Work History/Placement tab before filling out a follow-up.

## **Providing other than direct services**

Your organization deals with several different types of services.

- **Direct Services** - Services directly tied to the grant for the client. In this document recording direct services is covered under the specific program enrollment for which the service relates. For example, to learn about recording direct services

under a Homeless grant, look in the Homeless Applications and Enrollment section and the Bed Facility section.

- Indirect Services - Services your organization provides to groups of people.
- Universal Services - Services your organization provides to the client, which are not directly tied to a specific grant.
- Referrals - Services provided by another organization to which you make a referral for your client.

The following topics will show you how to record Indirect Services, Universal Services and Referrals.

## **Adding new family members**

Note: If you have gone through the tutorial, including the section on adding basic client information, you have already learned how to create family groups and add family members to the group. If you want a quick refresh, read this topic. If you are ready to learn more functionality associated with the family account feature, click the right arrow at the bottom of the screen to continue.

For ClientTrack to work most effectively, you should record all your client's family members who live in the same household as part of your basic client info. This assumes you have already created a family group to which you are now adding new family members

To add a family member to a family group

1. From the Shared Client Information screen, click the Current Family tab.
2. From the Family Group screen, in the second (or middle-level) toolbar, click New.

Note: The toolbar at the top of the screen manages family groups, while the toolbar in the middle of the screen manages family members.

3. In the Client # box, type or look up the client's ClientTrack ID number, if the family member has been entered as a client in ClientTrack. If the person is not a client, you will leave this box blank.
4. In the Family Member box, type the family member's name, first name first, then last name. ClientTrack will automatically use the second name typed as the last name.
5. In the Birthdate box, type the family member's birth date.
6. In the Relationship box, select the appropriate relationship of this person to the family.
7. In the Date Added box, type the date the family member was added to the family record.
8. In the Date Removed box, type the date the family member is removed from the family record.

9. Click Save-Close or Save-Add New if you want to add another family member to the family group.