Desk Guides

ClientTrack* Data Entry and Reporting

Produced by:
Strategic Planning, Research, and Evaluation Team,
Community Services Department (CSD)

** The database may be referred to as "CT" throughout this document*

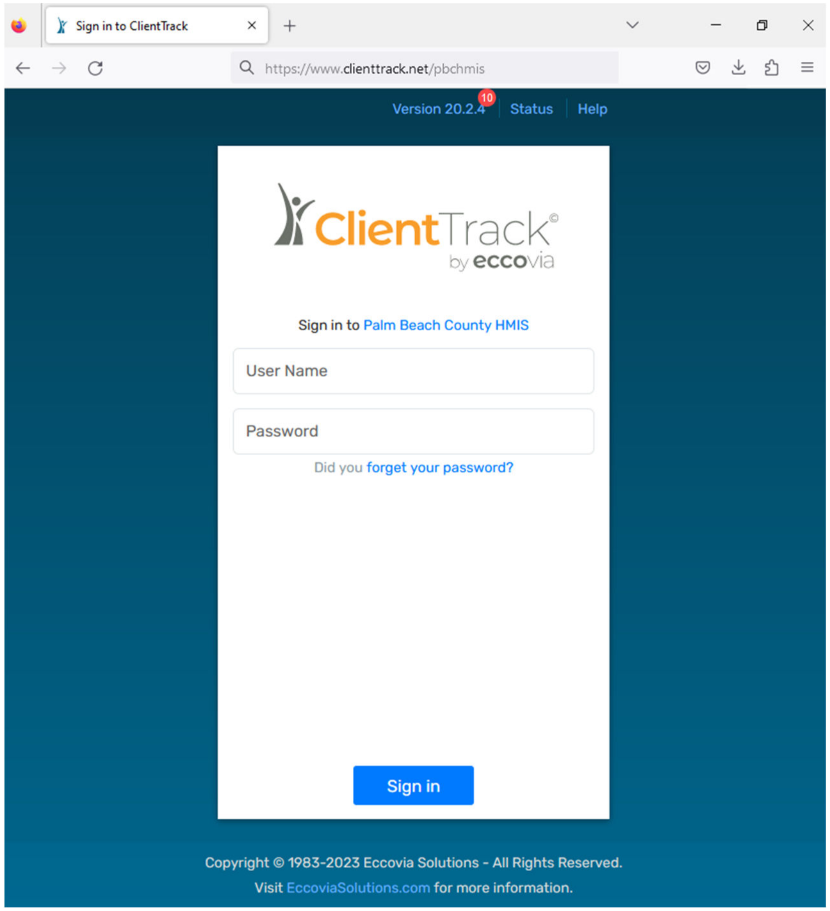
Document last updated by SC on 01/26/2024

TABLE OF CONTENTS

TABLE OF CONTENTS (cont.)

LOG IN –

- https://www.clienttrack.net/pbchmis
- CT is best used with Google Chrome and/or Mozilla Firefox
- Login with your User Name and Password
- If you are a new user, please contact David Tedesco (dtedesco@pbcgov.org) for the necessary user forms
    - If your agency terminates an employee with access to CT, please notify David Tedesco (dtedesco@pbcgov.org) to have the employee's access terminated as soon as possible.



DATA INTEGRITY –

Please remember the importance of maintaining and reporting accurate data. When entering the data into ClientTrack, please ensure that you are completing all the required demographic fields and following all of the necessary steps outlined in this guide to correctly capture the services that your agency is providing to your program participants. Quarter Reports are intended to provide a snapshot of how program participants are progressing each quarter and should also be utilized as a tool for quality assurance within your organization. Data should be entered into ClientTrack in a timely manner and in accordance to your contract's programmatic requirements.

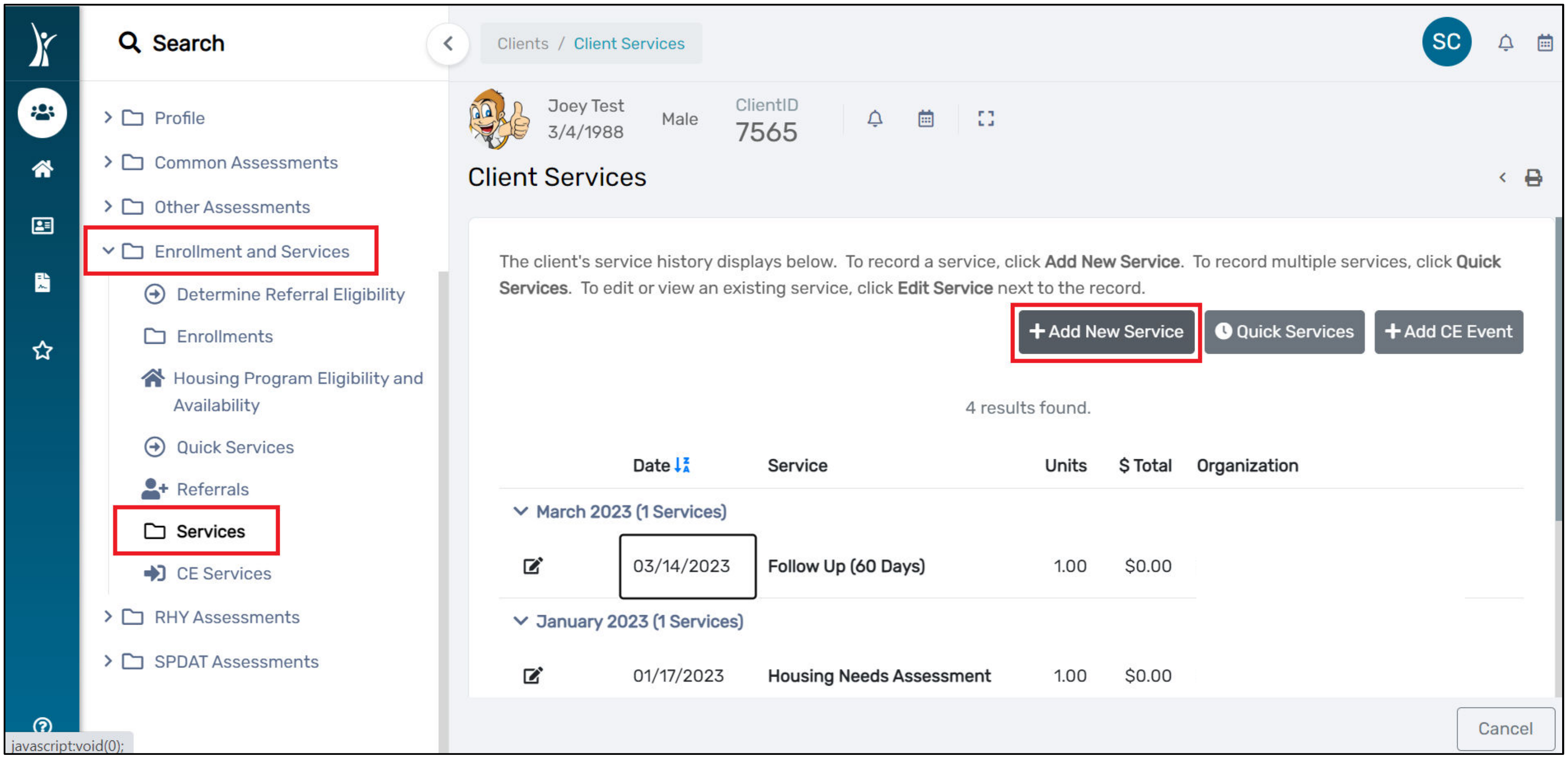
When providing the supplemental data reports, please certify that you have done the following:

- Downloaded all reports as 'Excel Data' – PDFs and regular excel downloads will not provide all the information needed to verify the numbers on the Quarter Reports.
- Removed any exact duplicates from the spreadsheet. This is more likely to apply to Data Explorer reports.
- Only provide data on the assessments that contribute towards your outcome determination for each program participant. Additional assessments done during the fiscal year to track progress can be omitted when submitting supplemental data.
- Clearly identify which program participant met the outcome, who did not meet the outcome, and who cannot be measured yet/at all.

ENTERING SERVICES –

To enter a service:

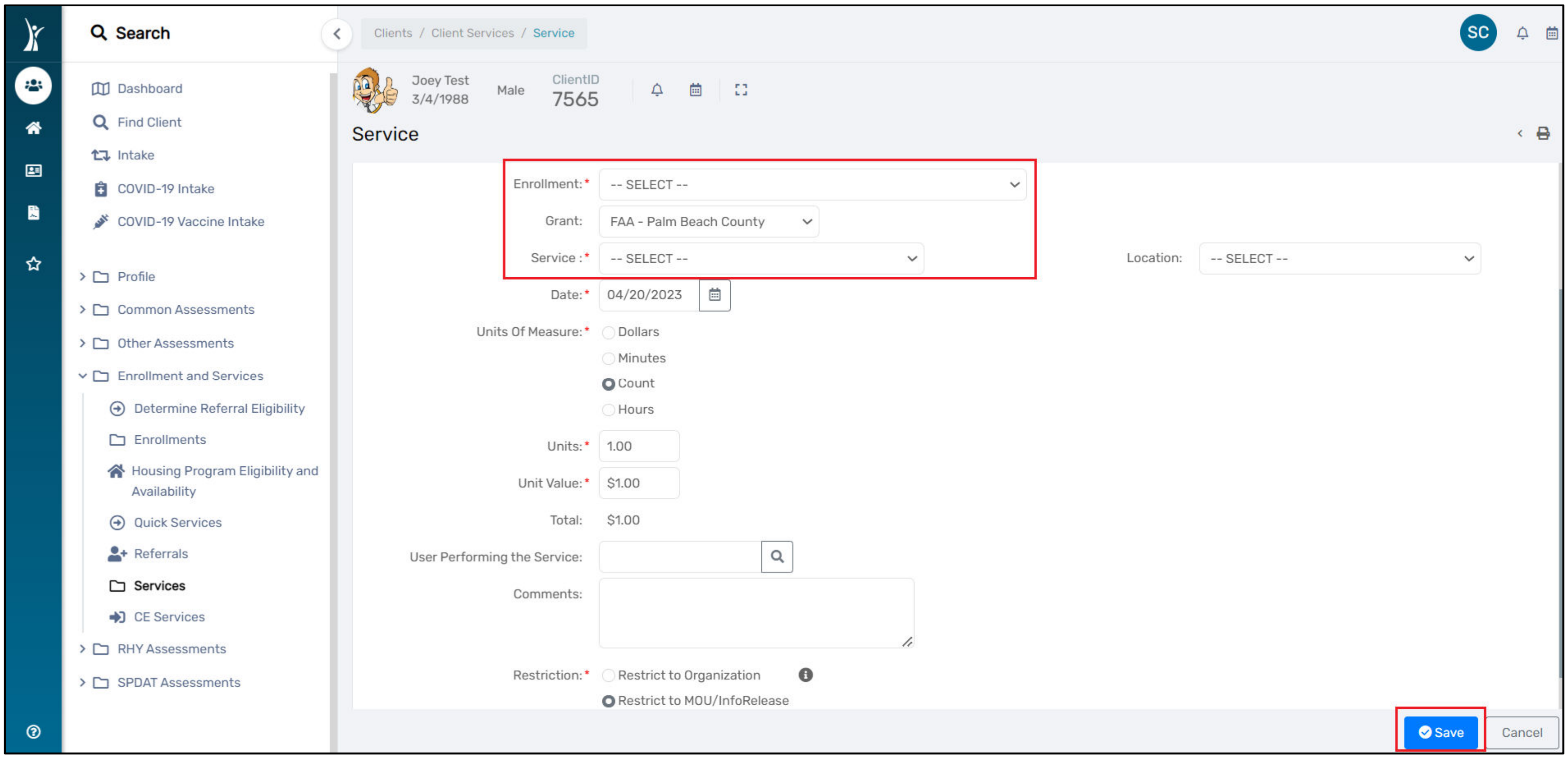
- Go to the client page in ClientTrack
- Click on 'Enrollment and Services' from the left panel
- Click on 'Services'
    - Click Add 'New Service' from the top right



ENTERING SERVICES (cont.) –

To enter a service (cont.):

- Select the correct Enrollment (based on your program name in the database)
- Select “FAA – Palm Beach County” as your Grant
- Select the desired option(s) for the Service
- *Everything else on the service form can be left as-is unless you’d like to add comments*
- Press ‘Save’ at the bottom of the page to complete.

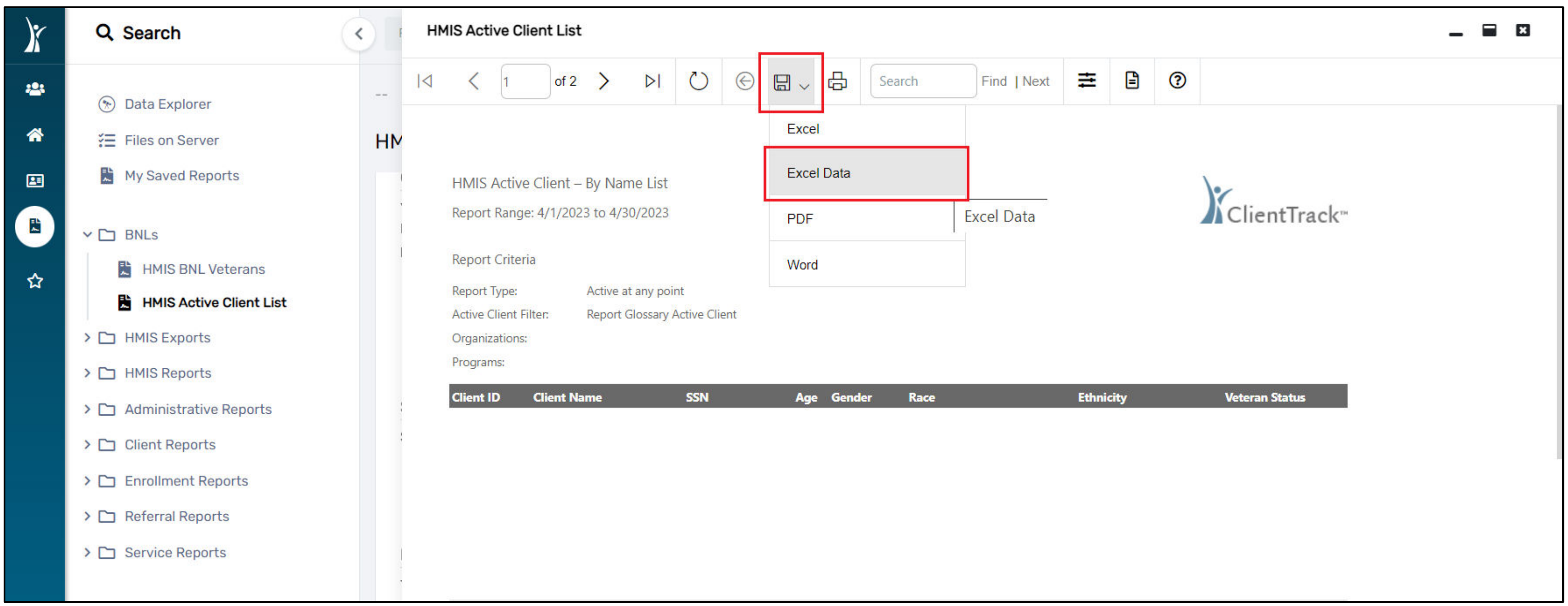


DEMOGRAPHICS REPORT –

All programs entering data into CT should utilize the demographic report for Quality Assurance and as supplemental data when completing Quarter Reports. Demographic reports are populated from fields completed during the Client intake and/or enrollment to your program.

To run a demographic report in CT:

- Ensure you are in the correct workgroup (***HMIS User***)
- Go to the Reports page in ClientTrack
- Click on ‘BNLs’ from the left panel and select “HMIS Active Client List”
- Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program, Head of Household – if applicable) and press ‘Report’
- When the report populates, click on the save icon to reveal a dropdown and export the report to Excel Data



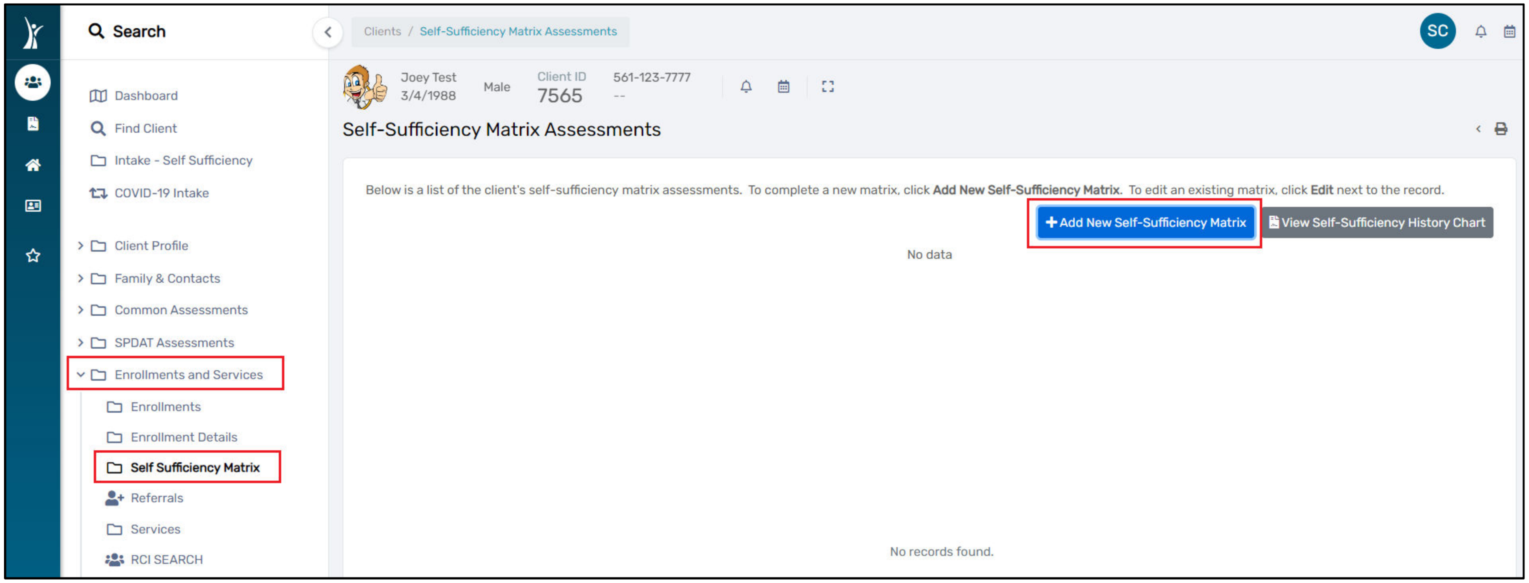
OUTCOME ENTRY & REPORTING: Economic Stability

Individuals maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

This outcome is based on the Self-Sufficiency Matrix Assessment (SSM). At least two (2) assessments must be completed during the fiscal year. The outcome is measured from baseline in the fiscal year to the follow-up assessment and will be based on whether there is an increase/maintenance on the SSM in one or more categories.

To enter a Self-Sufficiency Matrix assessment:

- Ensure you are in the correct workgroup (***PBC – CSD SOFI***)
- Go to the client page in ClientTrack
- Click on "Enrollments and Services" and select 'Self Sufficiency Matrix' from the left panel
- Click on '+ Add New Self-Sufficiency'

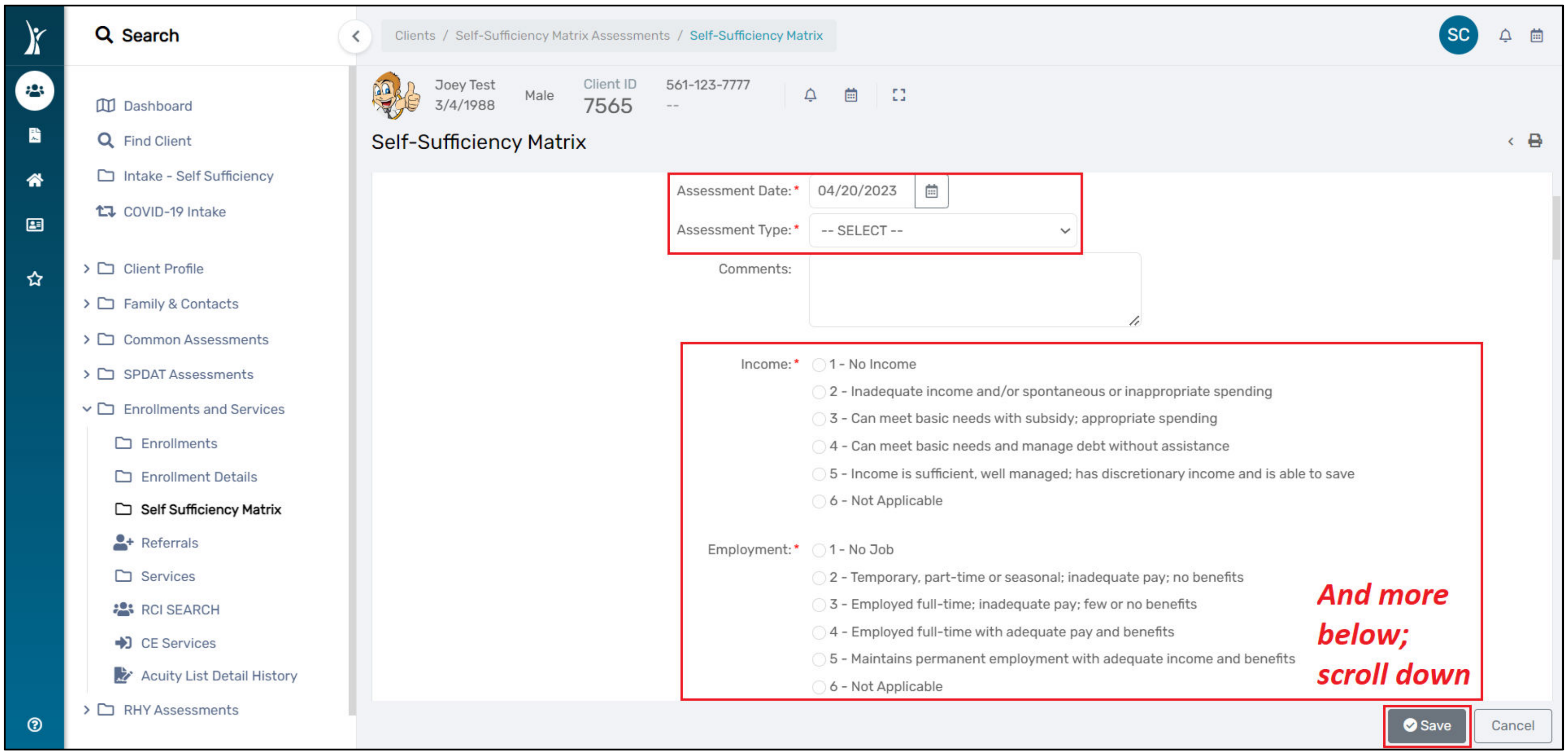


OUTCOME ENTRY & REPORTING: Economic Stability

Individuals maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

To enter a Self-Sufficiency Matrix assessment (cont.):

- Enter the correct date for the assessment
- Select 'Assessment Type' (Entry for 1st, "Update" for all quarters after, Exit when leaving program)
- *You can enter any comments that you feel are relevant*
- Complete each of the categories and press 'Save' at the bottom of the page to complete entry

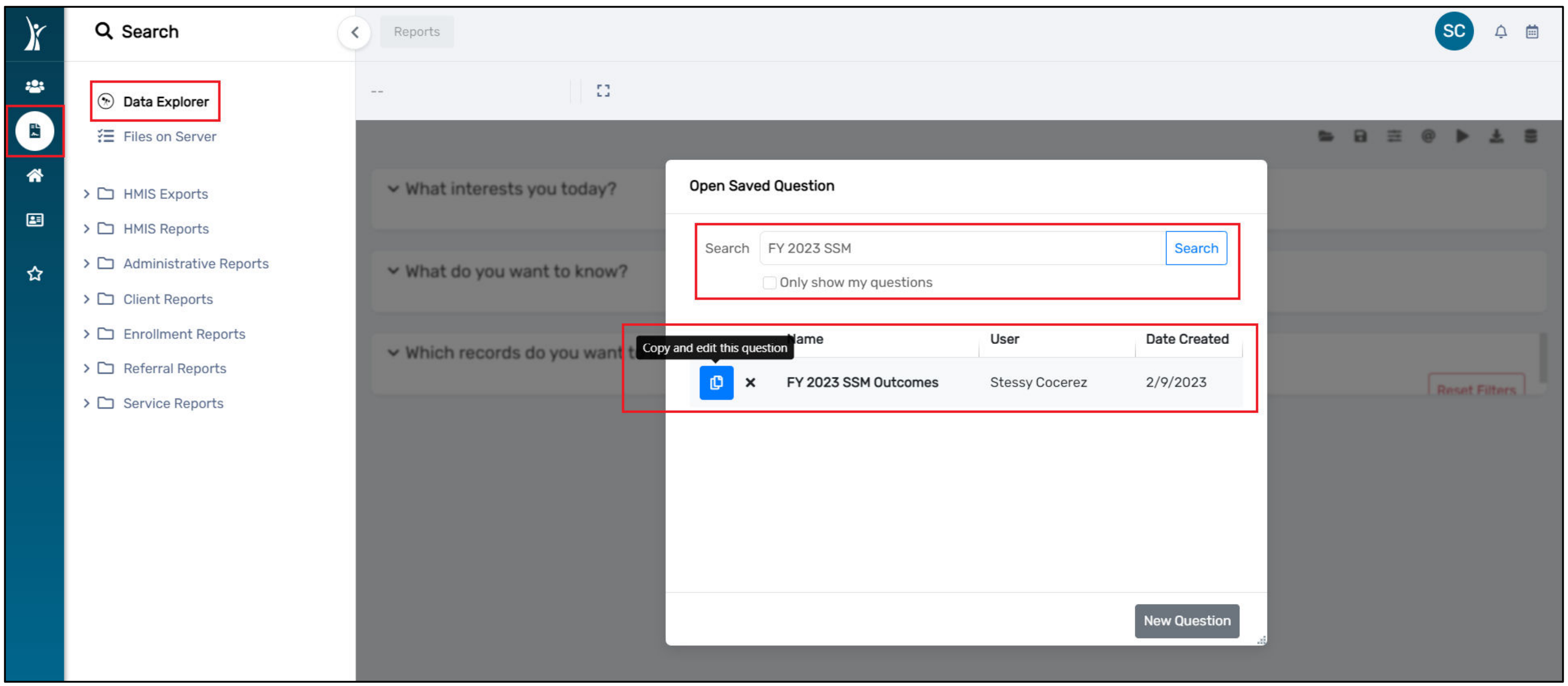


OUTCOME ENTRY & REPORTING: Economic Stability

Individuals maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

To run a Self-Sufficiency Matrix (SSM) report:

- Make sure you use (HMIS User) workgroup then Go to the Reports page in CT
- Select 'Data Explorer'
- In the popup, deselect the option to "Only show my questions" and type in "FY 2023 SSM"
  - Look for the report created by Stessy Cocerez on 2/9/2023 and click on the double paper icon to the left of the question in order to copy the report
  - Name the report whatever you'd like and press 'Ok'

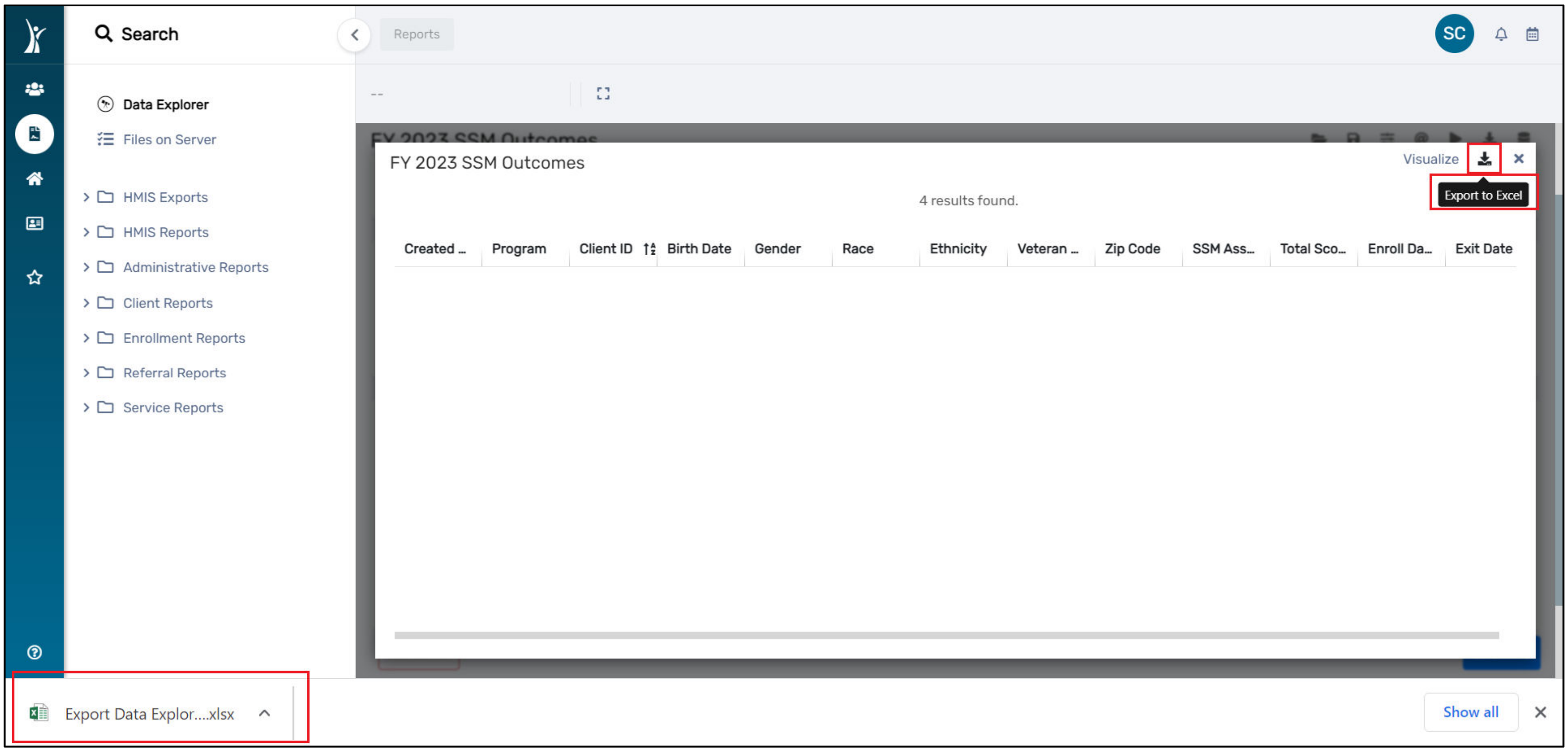


OUTCOME ENTRY & REPORTING: Economic Stability

Individuals maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

To run a Self-Sufficiency Matrix (SSM) report (cont.):

- Change the program name to reflect your program name in CT and check to make sure any date ranges are updated as needed, then press 'Show me' to run the report
- Click on the download icon to obtain an excel spreadsheet version of the report



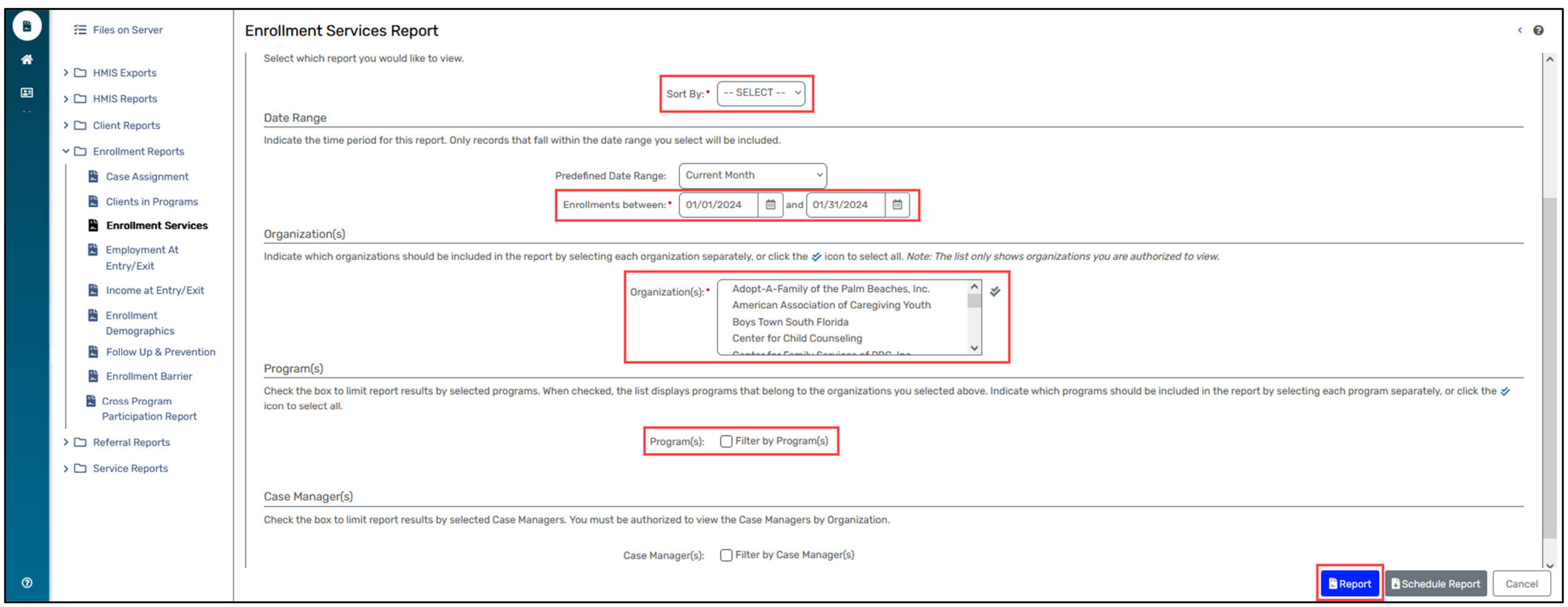
OUTCOME ENTRY & REPORTING: Economic Stability

Individuals that obtain financial resources that will lead to stability

This outcome is based on services (*see section on how to enter services*). The outcome is a proxy measured from the financial resource services entered into the database.

To run an Enrollment Services report:

- Go to the Reports page in CT
- Select ‘Enrollment Reports’
- Select ‘Enrollment Services’
- Complete the necessary fields to obtain the report for your program (i.e. Sort By, Enrollments between, Organization, Program) and press ‘Report’

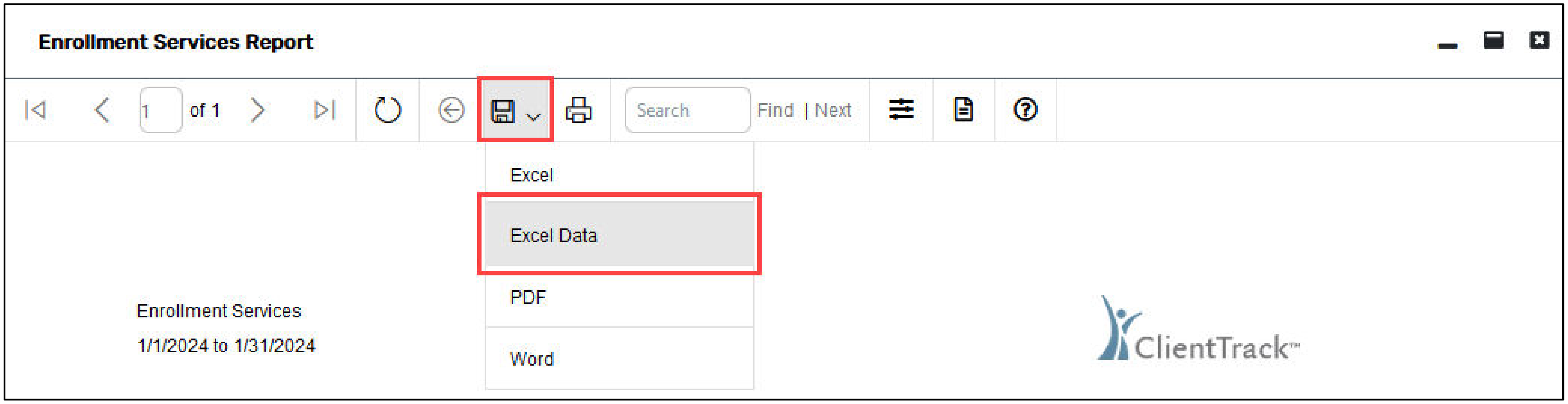


OUTCOME ENTRY & REPORTING: Economic Stability

Individuals that obtain financial resources that will lead to stability

To run an Enrollment Services report (cont.):

➢ When the report populates, click on the save icon to reveal a dropdown and export the report to Excel Data



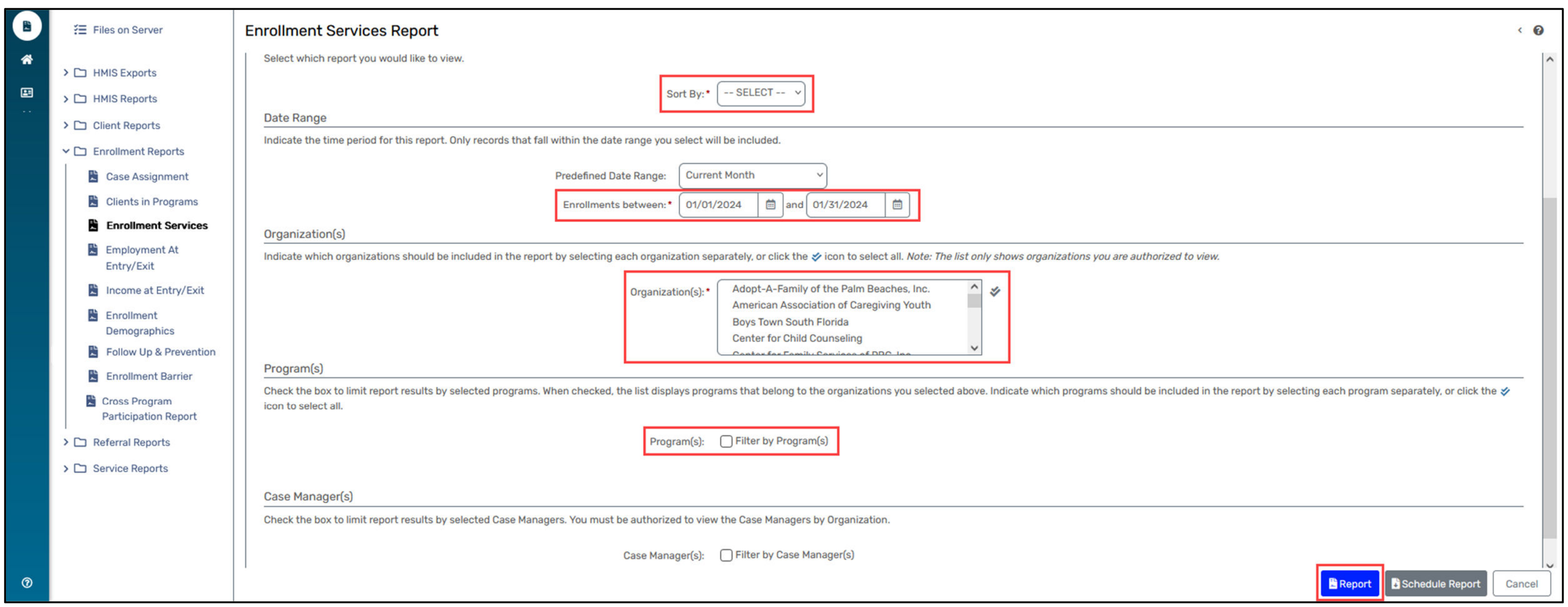
OUTCOME ENTRY & REPORTING: Economic Stability

Individuals that achieve at least one (1) objective on the Individualized Educational/Support Plan (IEP/ISP)

This outcome is based on services (*see section on how to enter services*). The outcome is measured from the IEP/ISP objective services entered into the database.

To run an Enrollment Services report:

- Go to the Reports page in CT
- Select 'Enrollment Reports'
- Select 'Enrollment Services'
- Complete the necessary fields to obtain the report for your program (i.e. Sort By, Enrollments between, Organization, Program) and press 'Report'

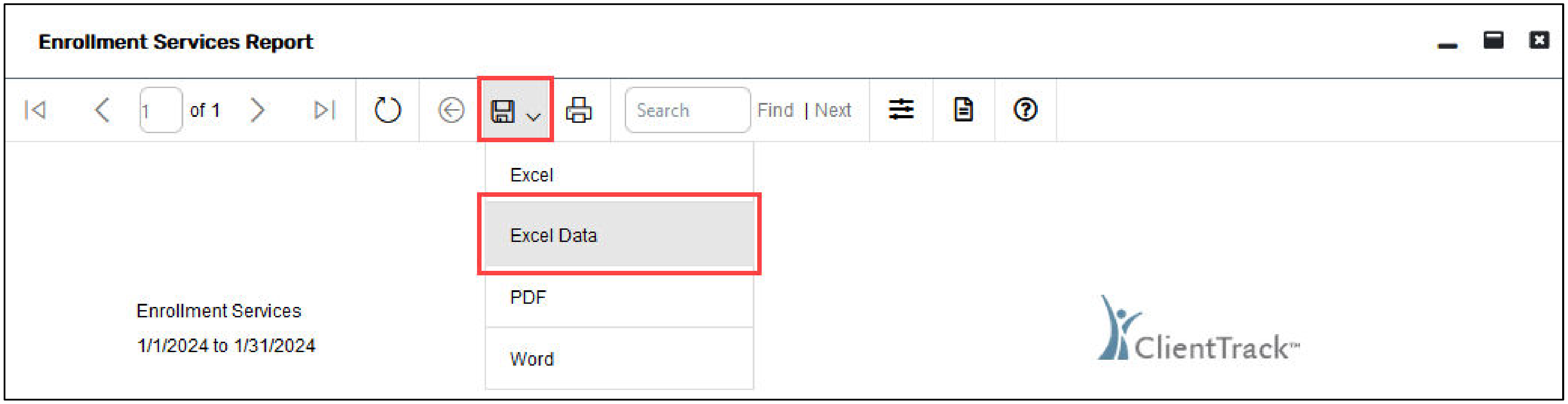


OUTCOME ENTRY & REPORTING: Economic Stability

Individuals that achieve at least one (1) objective on the Individualized Educational/Support Plan (IEP/ISP)

To run an Enrollment Services report (cont.):

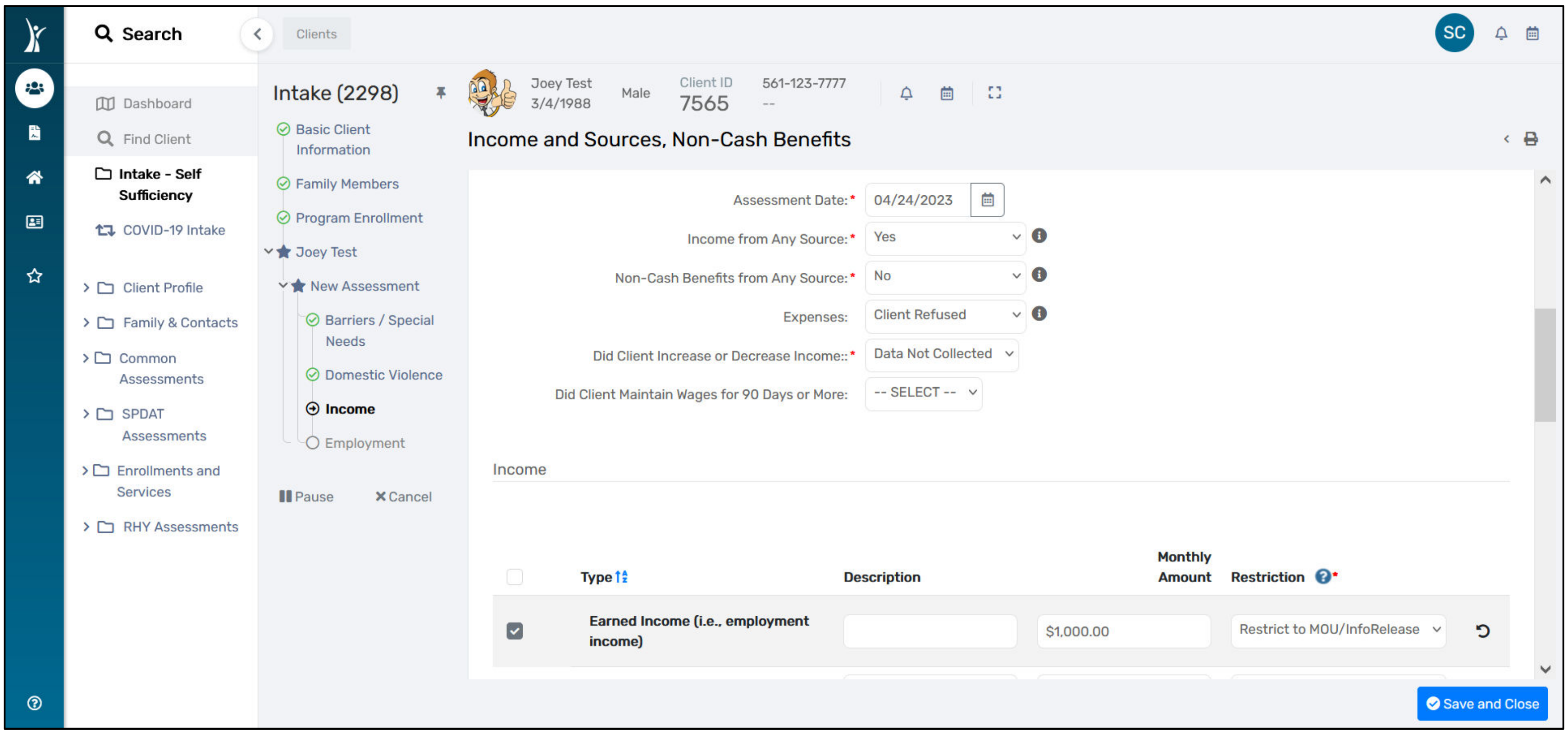
- ➢ When the report populates, click on the save icon to reveal a dropdown and export the report to Excel Data



OUTCOME ENTRY & REPORTING: Economic Mobility - Income

All agencies participating in the Securing Our Future Initiative (SOFI) should be entering income information for their clients. The information should be collected at least two (2) times per fiscal year. The first financial assessment done in the fiscal year (either in the first quarter or at the time of client enrollment) will be considered the baseline and any subsequent assessment(s) (either in the fourth quarter or at the time of client exit) will be considered follow-ups or updates during the enrollment period.

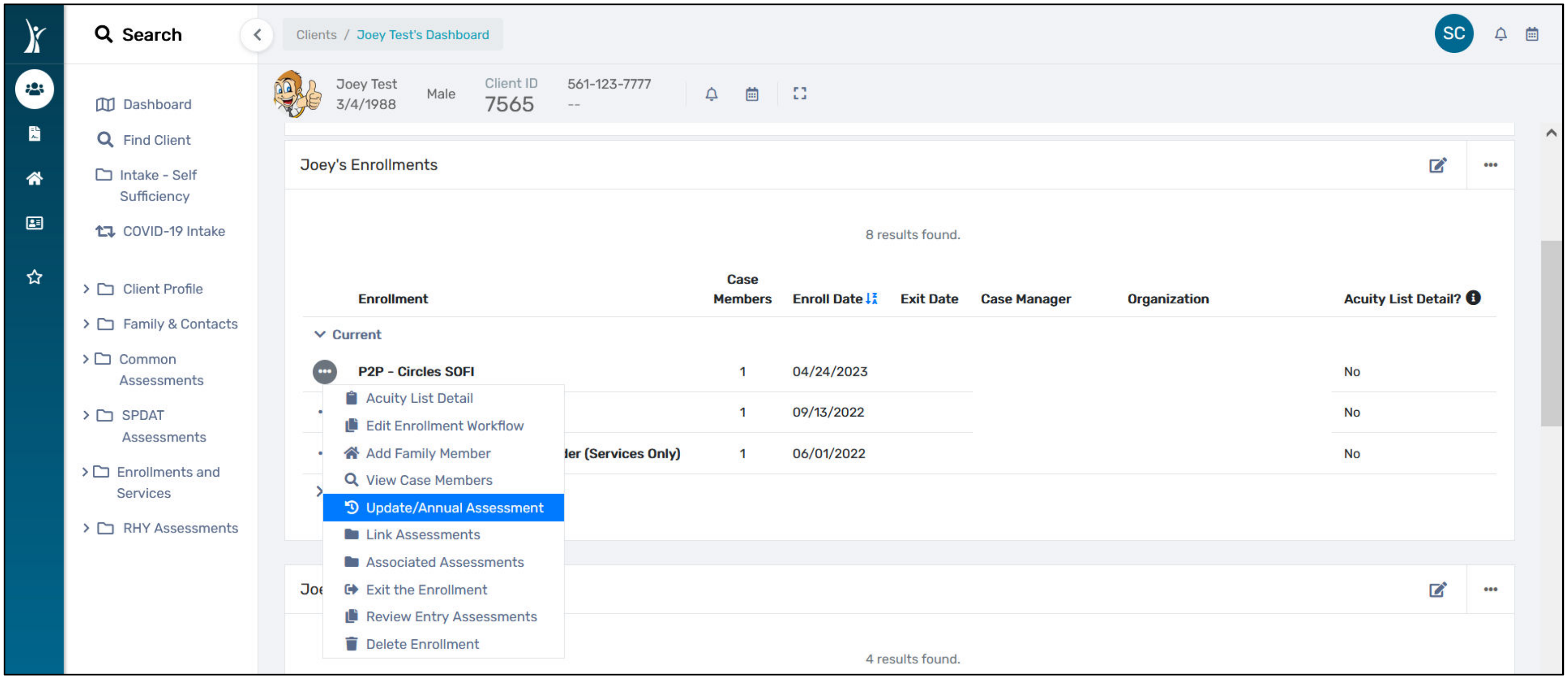
When enrolling a client into your program, you will complete an intake Income Assessment. This would be the baseline assessment. Please ensure you are using the ***PBC – CSD SOFI*** workgroup.



OUTCOME ENTRY & REPORTING: Economic Mobility – Income (cont.)

To enter a Financial Assessment as an Update/Annual Assessment (aka. follow-up):

- Ensure you are in the correct workgroup (***PBC – CSD SOFI***)
- Go to the client page in Client Track (2nd option down from left menu)
- Click on the action dropdown "(…)" to the left of your client's enrollment into your program and select 'Update/Annual Assessment'.



OUTCOME ENTRY & REPORTING: Economic Mobility – Income (cont.)

To enter a Financial Assessment as an Update/Annual Assessment (aka. follow-up) (cont.):

- Double check the family structure and select either “Save” or “No Changes”
- Click on “New During Program Enrollment/Update Assessment”
- Review the Universal Data Assessment components and press “Save”
- Review the Barriers/Special Needs components and press “Save” or “Save & Close” when complete
- Review the Domestic Violence Assessment and press “Save”
- Review and update the Income Assessment
    - Ensure that you are completing all of the required fields and answering all of the required questions
- When complete, press “Finish” to close the workflow

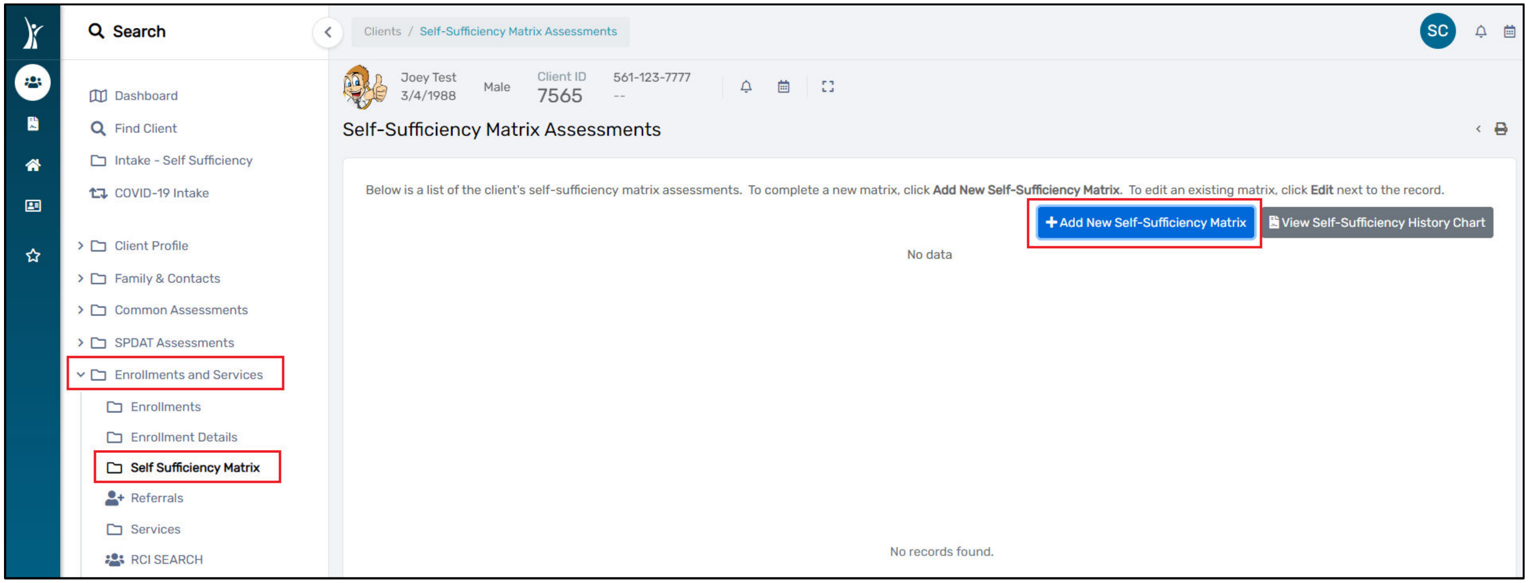
OUTCOME ENTRY & REPORTING: Economic Mobility

Households maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

This outcome is based on the Self-Sufficiency Matrix Assessment (SSM). Assessments must be completed each quarter that the client is enrolled in the program during the fiscal year. The outcome is measured from baseline in the fiscal year to the follow-up assessment(s) and will be based on whether there is an increase/maintenance on the SSM in one or more categories.

To enter a Self-Sufficiency Matrix assessment:

- Ensure you are in the correct workgroup (***PBC – CSD SOFI***)
- Go to the client page in ClientTrack
- Click on “Enrollments and Services” and select ‘Self Sufficiency Matrix’ from the left panel
- Click on ‘+ Add New Self-Sufficiency’

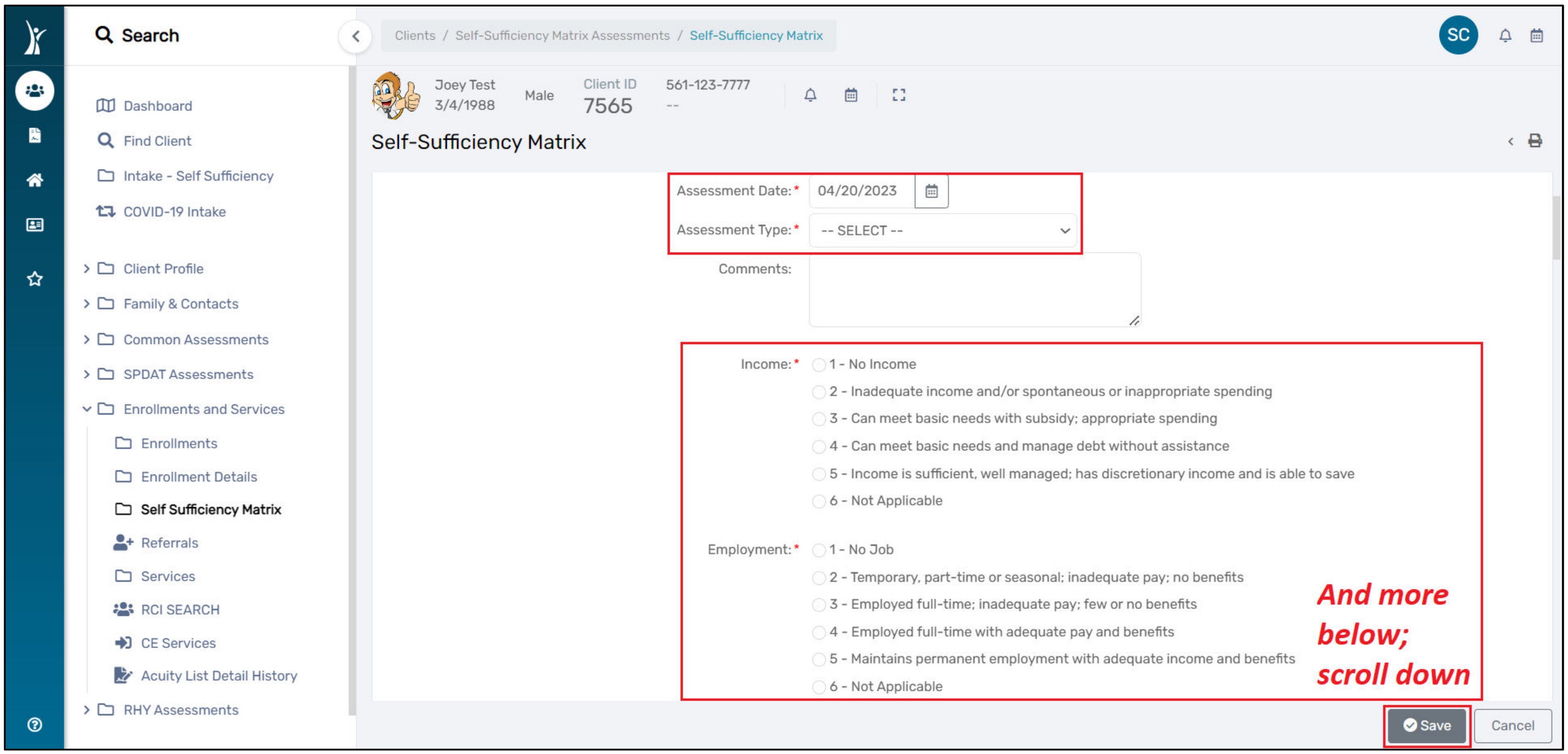


OUTCOME ENTRY & REPORTING: Economic Mobility

Households maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

To enter a Self-Sufficiency Matrix assessment (cont.):

- Enter the correct date for the assessment
- Select 'Assessment Type' (Entry for 1st, "Update" for all quarters after, Exit when leaving program)
- *You can enter any comments that you feel are relevant*
- Complete each of the categories and press 'Save' at the bottom of the page to complete entry

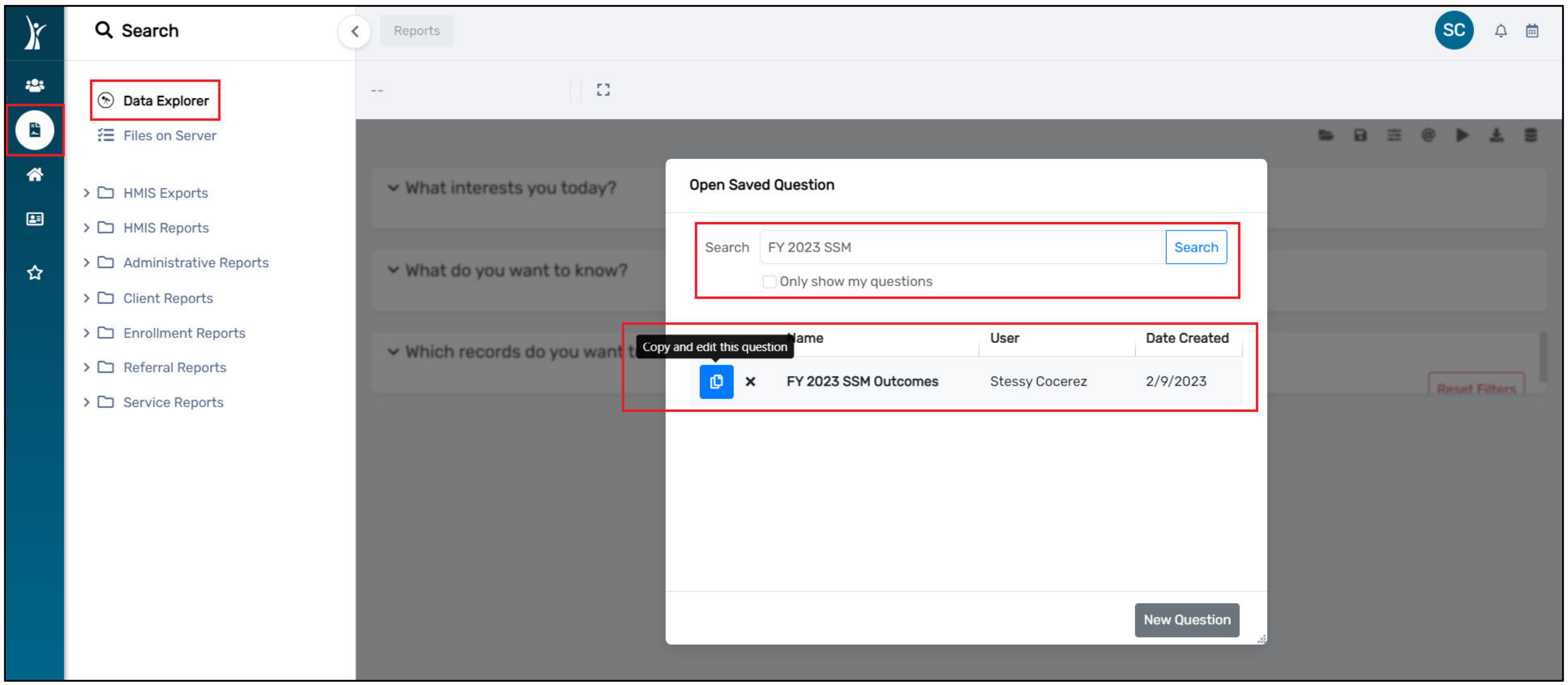


OUTCOME ENTRY & REPORTING: Economic Mobility

Households maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

To run a Self-Sufficiency Matrix (SSM) report:

- Go to the Reports page in CT
- Select 'Data Explorer'
- In the popup, deselect the option to "Only show my questions" and type in "FY 2023 SSM"
    - Look for the report created by Stessy Cocerez on 2/9/2023 and click on the double paper icon to the left of the question in order to copy the report
    - Name the report whatever you'd like and press 'Ok'

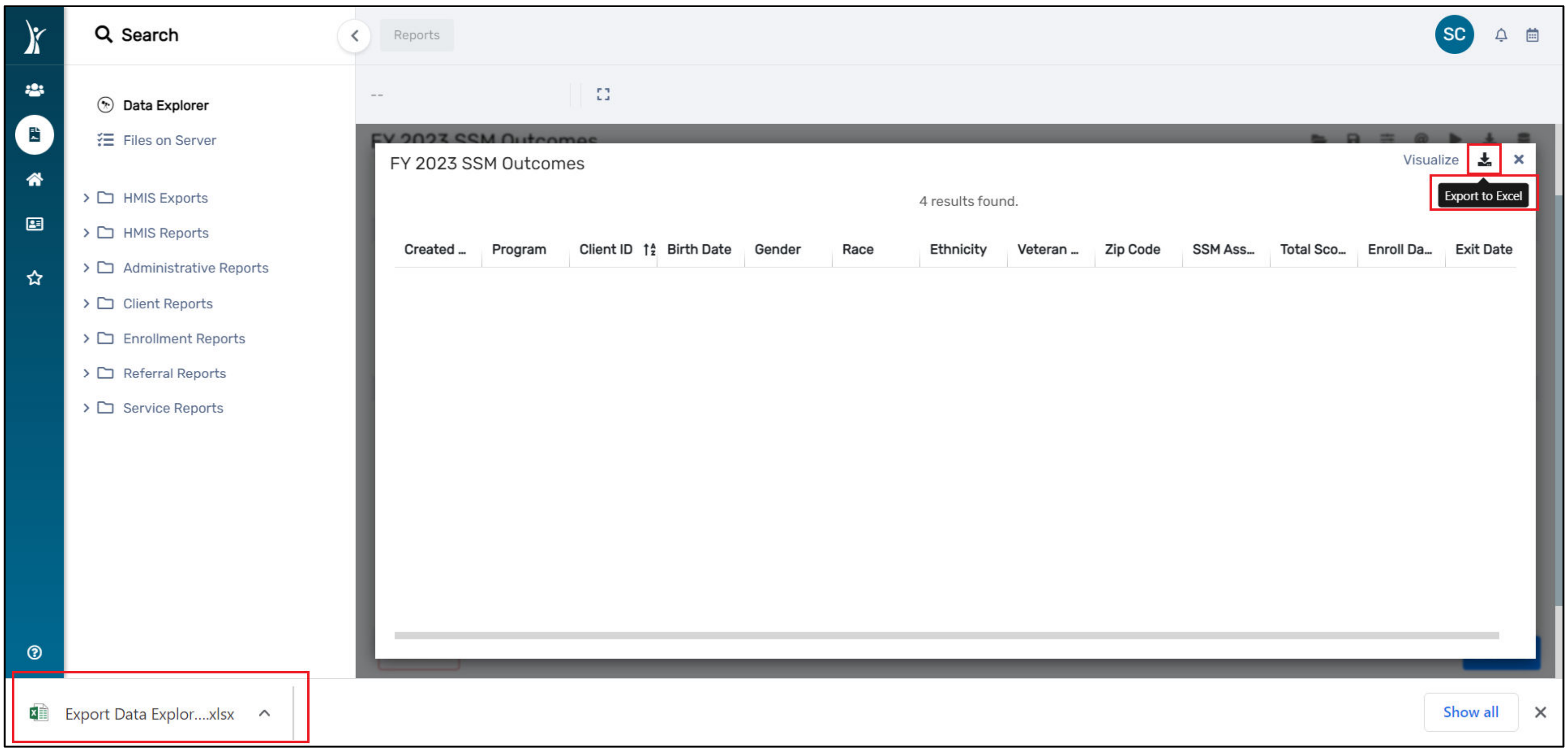


OUTCOME ENTRY & REPORTING: Economic Mobility

Households maintain or increase their self-sufficiency in one or more categories such as Transportation, Childcare, Housing, Employment, Income, Education, etc. as measured on the Self-Sufficiency Matrix

To run a Self-Sufficiency Matrix (SSM) report (cont.):

- ➢ Change the program name to reflect your program name in CT and check to make sure any date ranges are updated as needed, then press ‘Show me’ to run the report
- ➢ Click on the download icon to obtain an excel spreadsheet version of the report



OUTCOME ENTRY & REPORTING: Economic Mobility

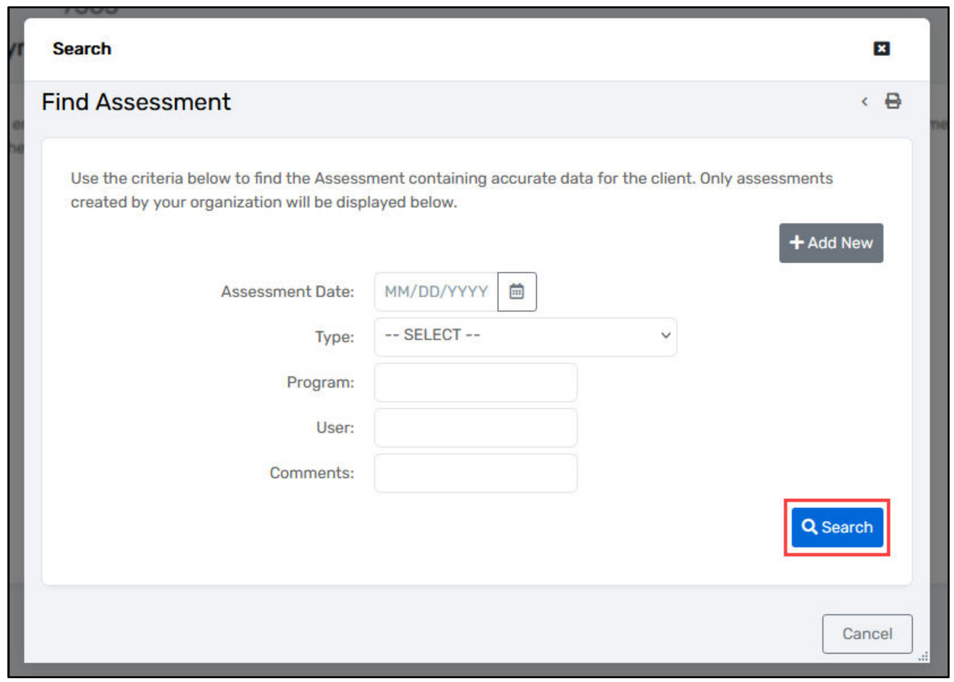
Households obtain employment or better their employment

You must **first** have completed an updated assessment to link to your employment assessment see page 18 and do that first.

This outcome is based on the Employment Assessment. Assessments must be completed each quarter that the client is enrolled in the program during the fiscal year. The outcome is measured from baseline in the fiscal year to the follow-up assessment(s) and will be based on whether employment is **obtained, maintained or improved.** Improved ("better") employment is defined as an increase in salary, increase in status, and increase in hours, or more benefits.

To enter an Employment Assessment:

- Ensure you are in the correct workgroup (***PBC – CSD SOFI***)
- Go to the client page in ClientTrack
- Click on "Common Assessments" and select 'Employment' from the left panel
- Click on "+ Add New"
- On the following page, click on the search icon in the center of the page to link your assessment with your program enrollment. In the Find Assessment search popup, leave the fields blank and click search to display all the possible choices. Select the Assessment Date / Type that applies to the current quarter.

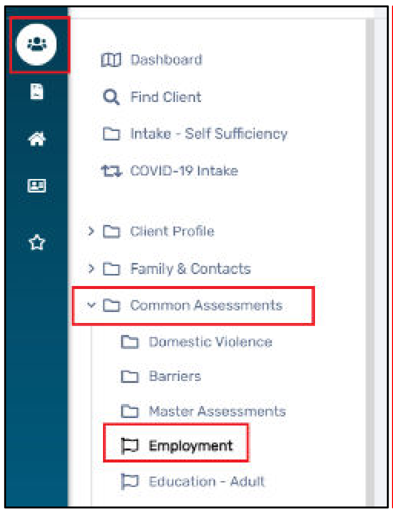


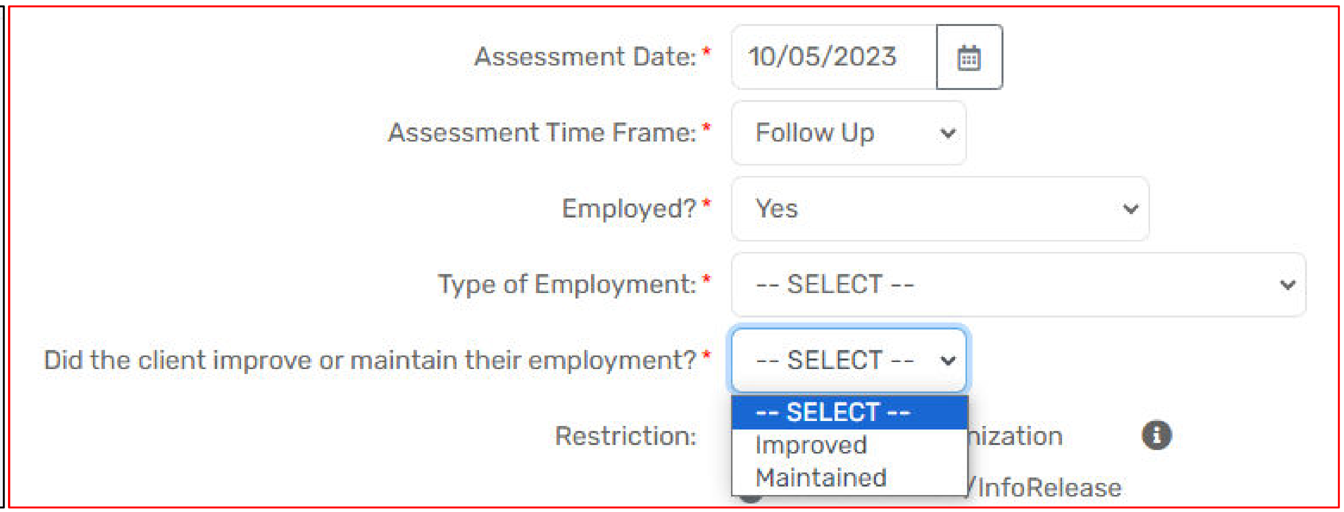
OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

To enter an Employment Assessment (cont.):

- Enter Assessment Date, then Choose Assessment Time Frame, then complete all the required fields –
  - If Employed, there's "Maintained" (new option) or "Improved"
- Complete each of the questions and press 'Save' at the bottom of the page to complete entry





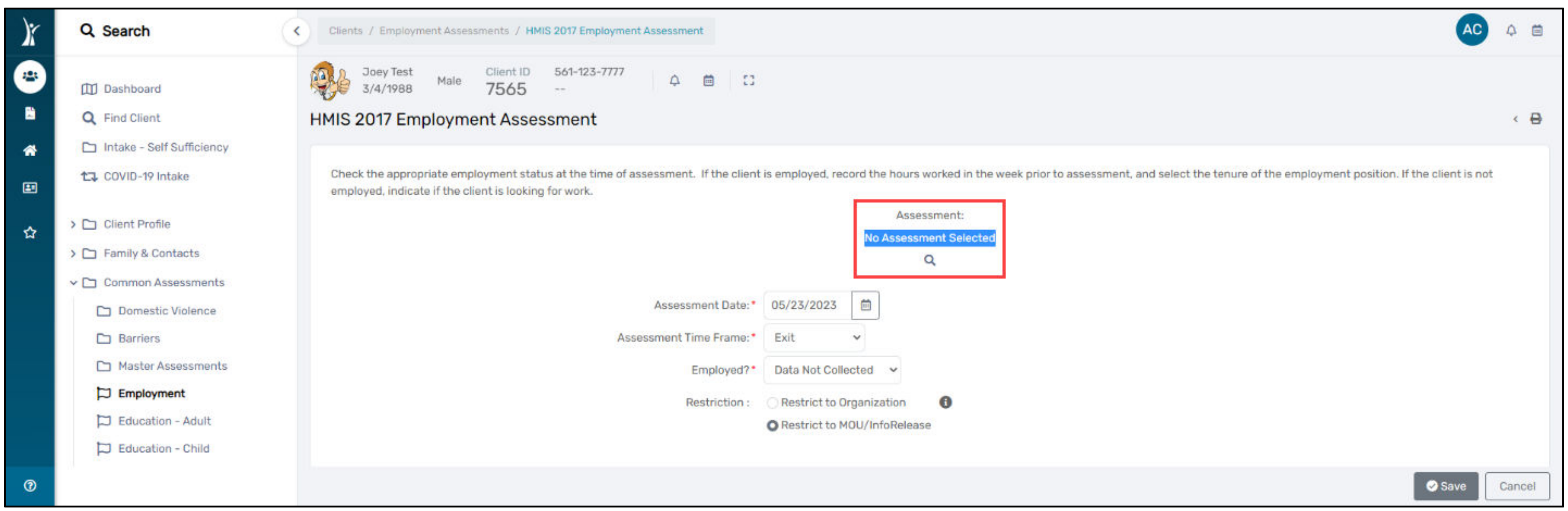
OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

If your agency did not enroll a client under the PBC – CSD SOFI workgroup prior to entering an Employment Assessment for that client, you will need to "link" your Employment Assessment to the client's current enrollment into your program.

To link an Employment Assessment to the active Program Enrollment:

- Ensure you are in the correct workgroup (***PBC – CSD SOFI***)
- Go to the client page in ClientTrack
- Click on "Common Assessments" and select 'Employment' from the left panel
- Select the desired assessment to link and click the "Edit" icon to the left of the assessment information
- Click on the magnifying glass under "No Assessment Selected" to search for the enrollment. *The easiest way to search is to leave all fields blank and just press "Search" to display all your options.*

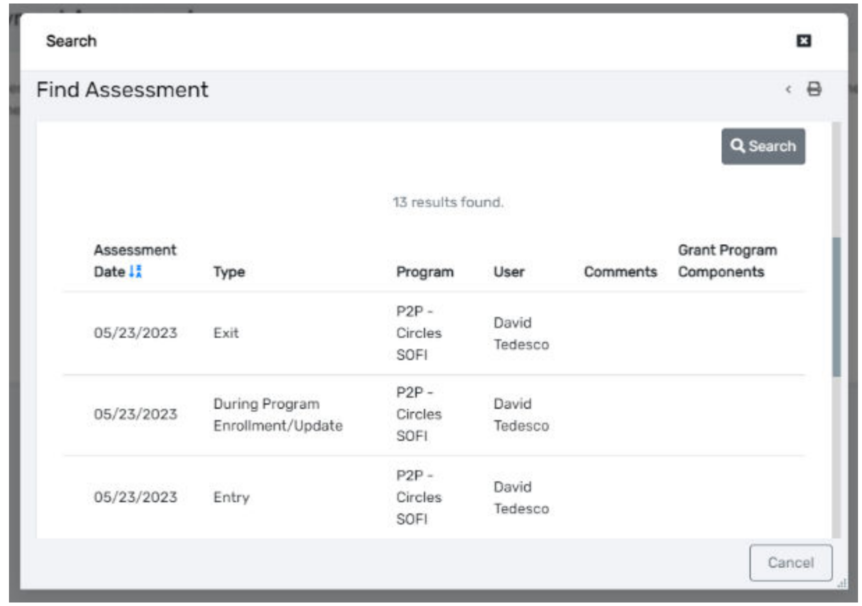


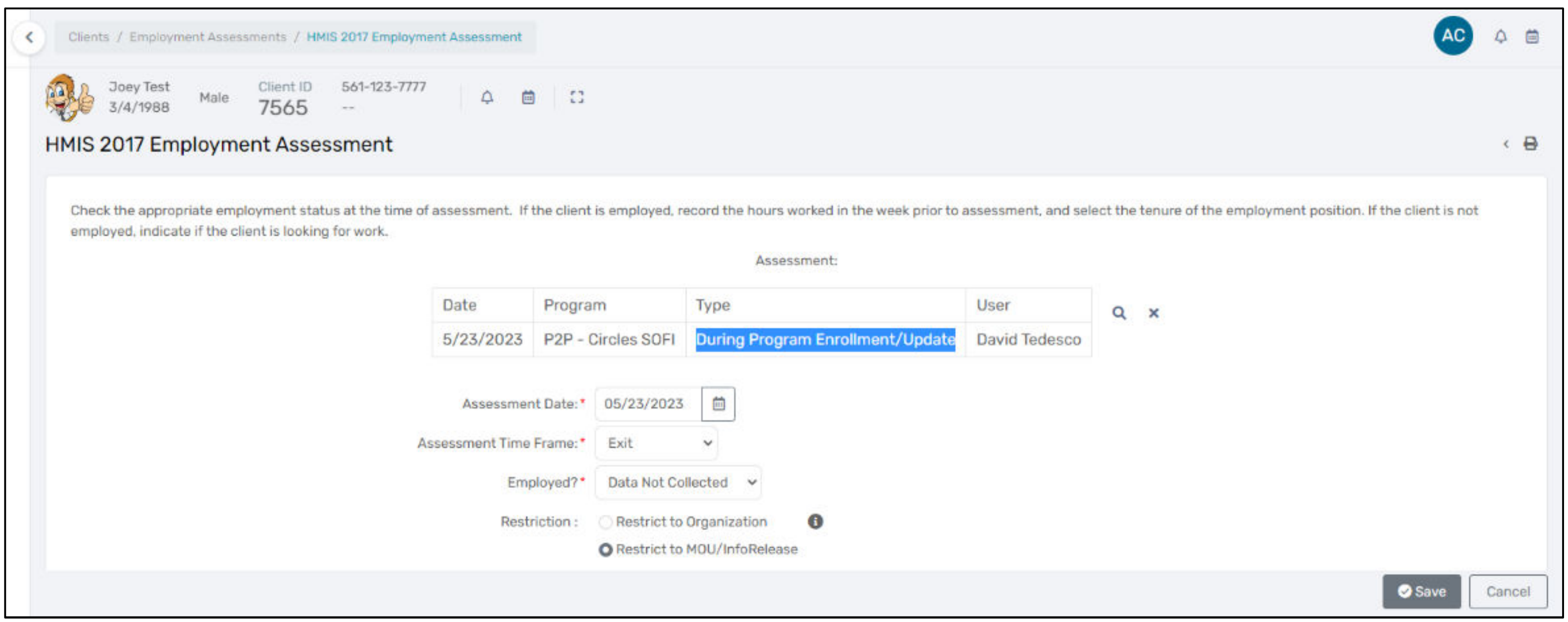
OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

To link an Employment Assessment to the active Program Enrollment (cont.):

- Choose Enrollment types (i.e. entry for 1st, exit to leave program, during program enrollment/update for all quarter reports after first that are not exit).
- Once the link has been finalized, the Employment Assessment page will update to include the associated program enrollment.



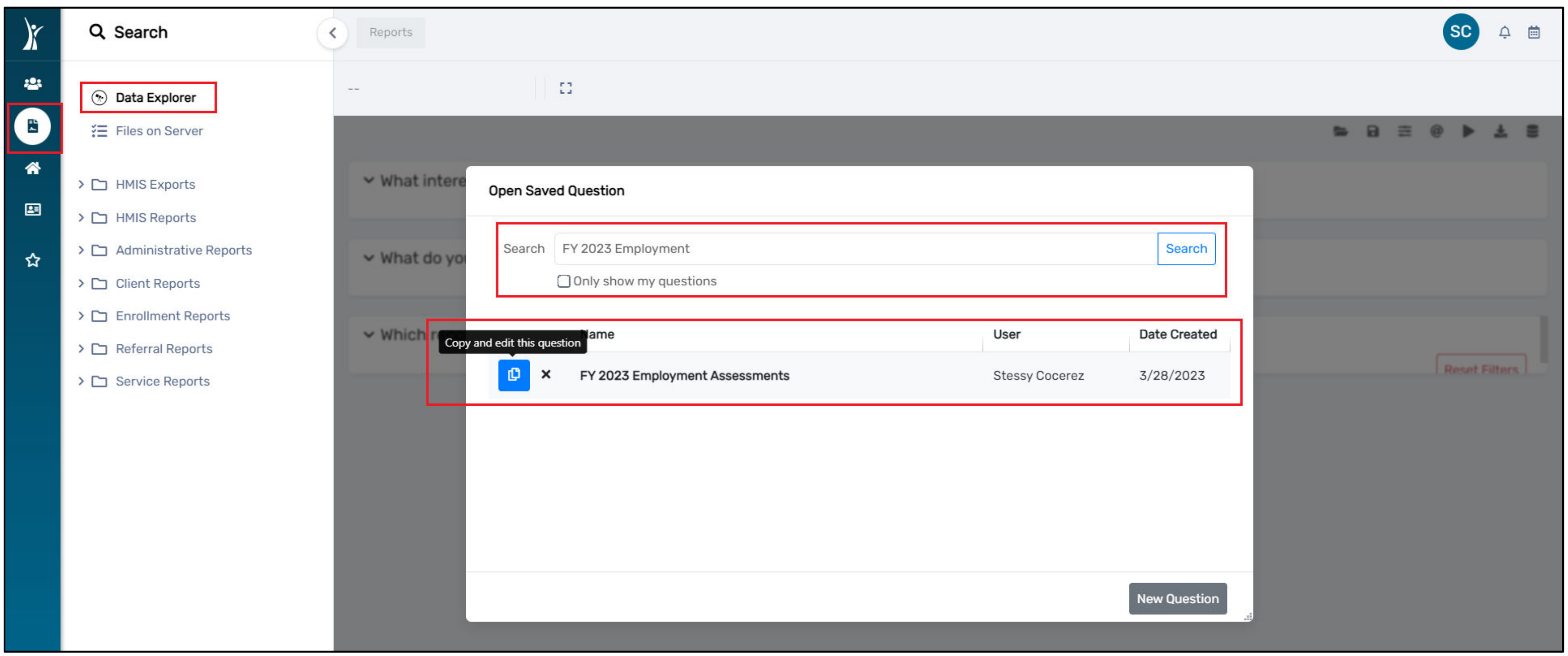


OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

To run an Employment Assessment report:

- Go to the Reports page in CT
- Select 'Data Explorer'
- In the popup, deselect the option to "Only show my questions" and type in "FY 2023 Employment"
    - Look for the report created by Stessy Cocerez on 3/28/2023 and click on the double paper icon to the left of the question in order to copy the report
    - Name the report whatever you'd like and press 'Ok'

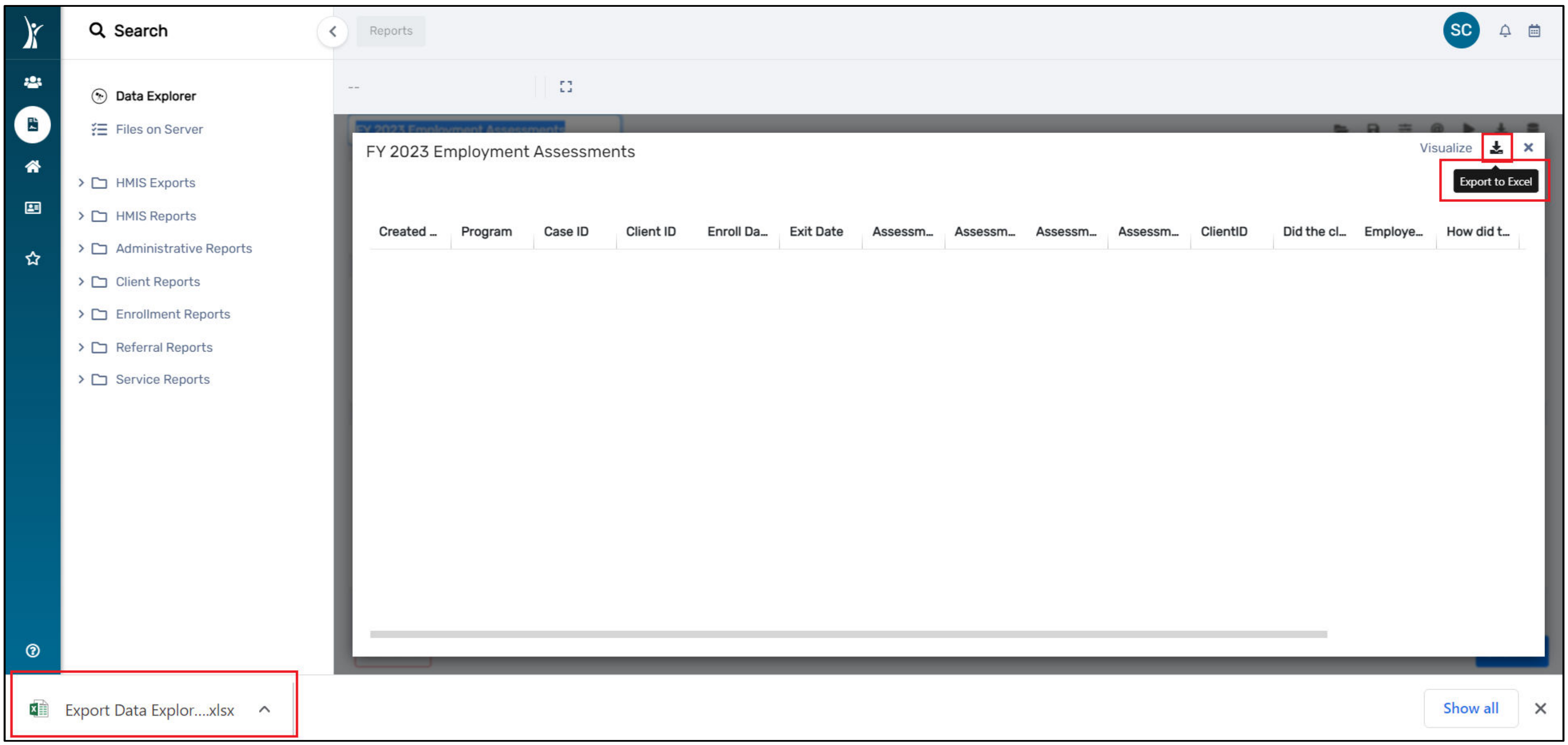


OUTCOME ENTRY & REPORTING: Economic Mobility

Households obtain employment or better their employment

To run an Employment Assessment report (cont.):

- ➢ Change the program name to reflect your program name in CT and check to make sure any date ranges are updated as needed, then press ‘Show me’ to run the report
- ➢ Click on the download icon to obtain an excel spreadsheet version of the report



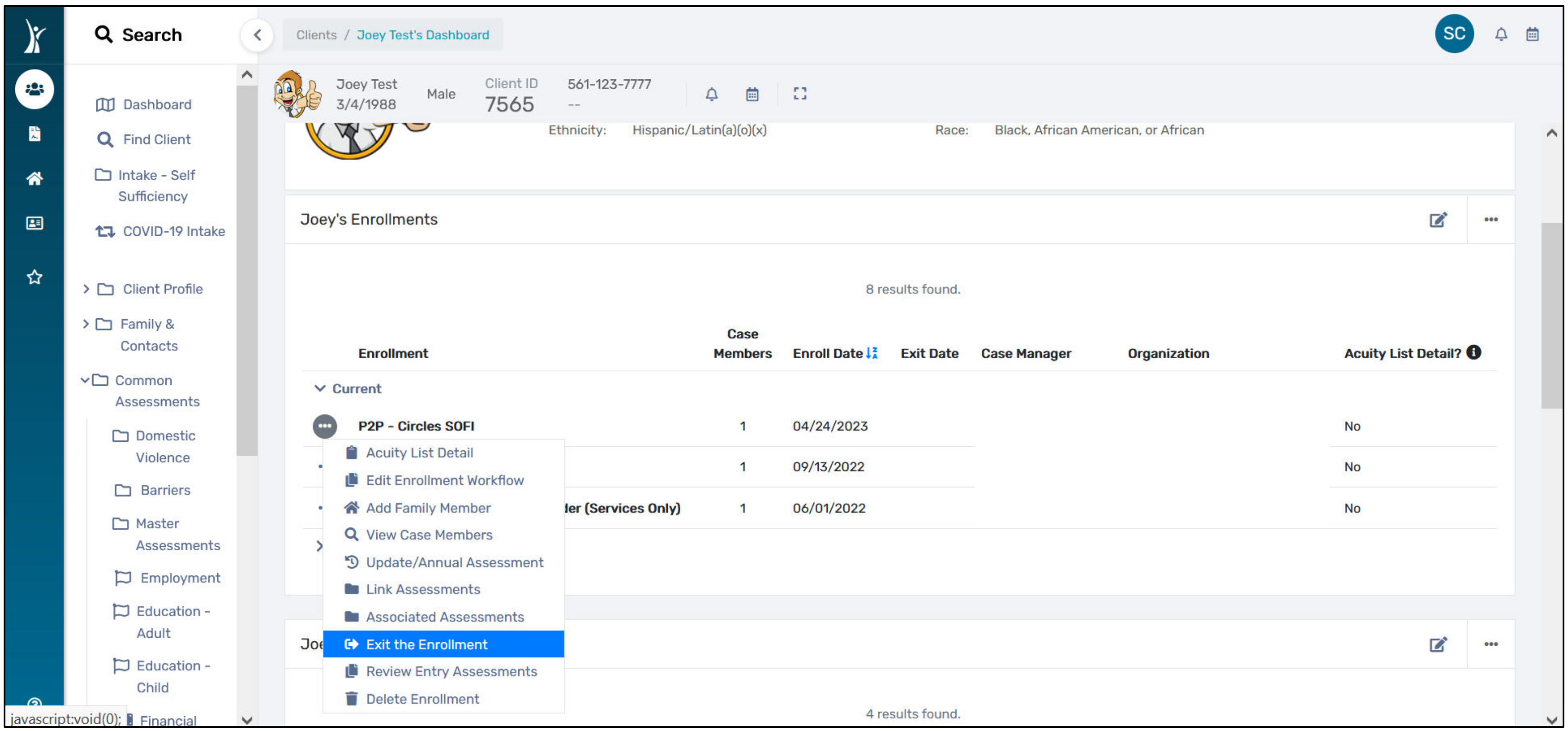
OUTCOME ENTRY & REPORTING: Homelessness

Individuals exit to Permanent Housing destinations

This outcome is based on the client's Exit Destination after leaving the program.

To enter Exit Destination information:

- Go to the client page in ClientTrack
- Click on the action dropdown "(…)" to the left of your client's enrollment into your program and select 'Exit the Enrollment'



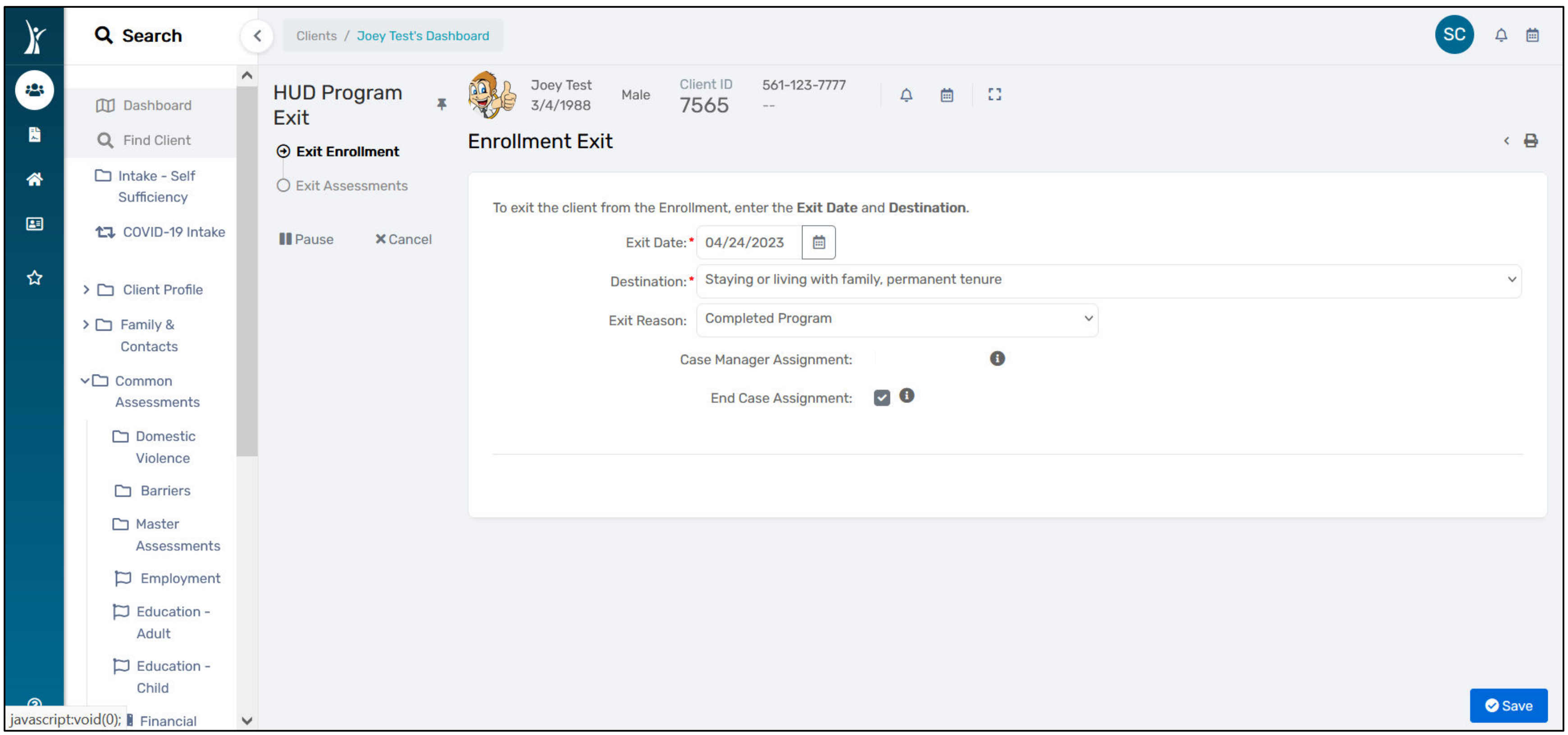
OUTCOME ENTRY & REPORTING: Homelessness

Individuals exit to Permanent Housing destinations

To enter Exit Destination information (cont.):

- ○ Complete the Enrollment Exit (i.e. Exit Date, Destination, Exit Reason) and press "Save"

- ➢ Complete the Universal Data Assessment, the Barriers/Special Needs Assessment, and the Income Assessment
- ➢ When complete, press "Finish" to close the workflow

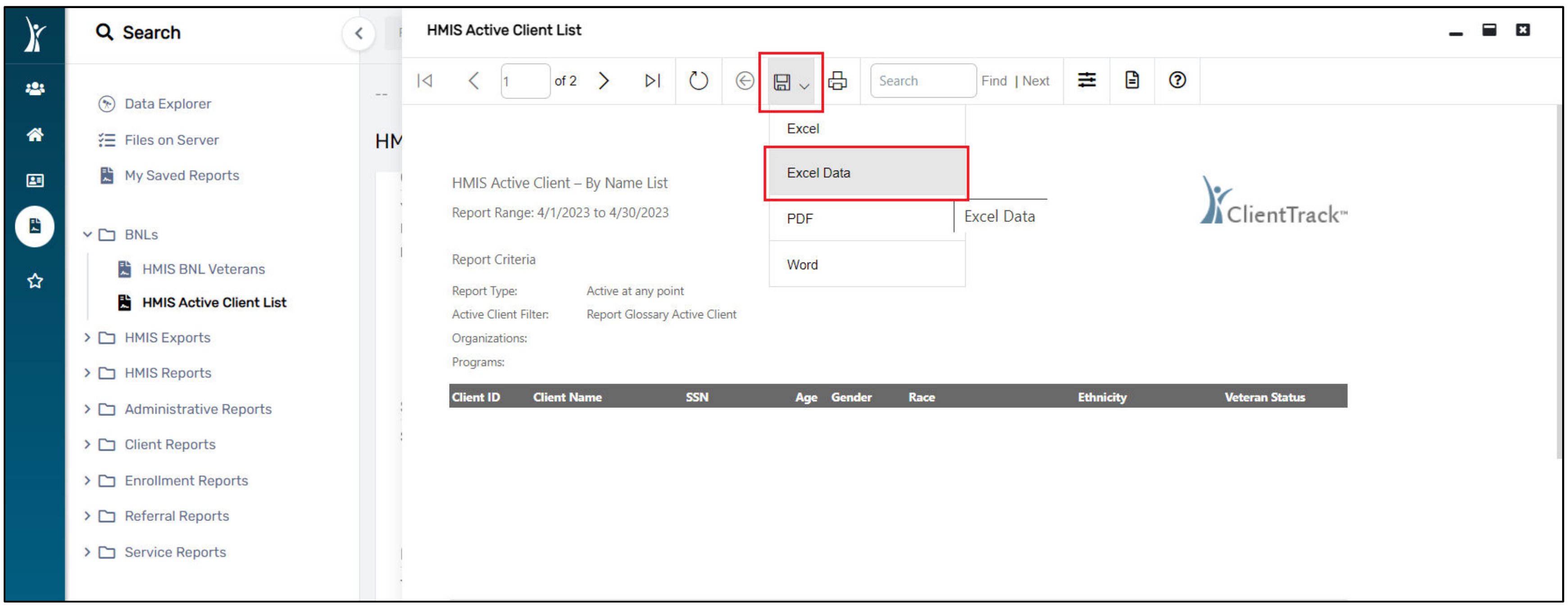


OUTCOME ENTRY & REPORTING: Homelessness

Individuals exit to Permanent Housing destinations

To run a report to display Exit Destination:

- Ensure you are in the correct workgroup (***HMIS User***)
- Go to the Reports page in ClientTrack
- Click on 'BNLs' from the left panel and select "HMIS Active Client List"
- Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program, Head of Household – if applicable) and press 'Report'
- When the report populates, click on the save icon to reveal a dropdown and export the report to Excel Data
- Within the report, look at the columns for Exit Destinations to identify which are considered 'Permanent'



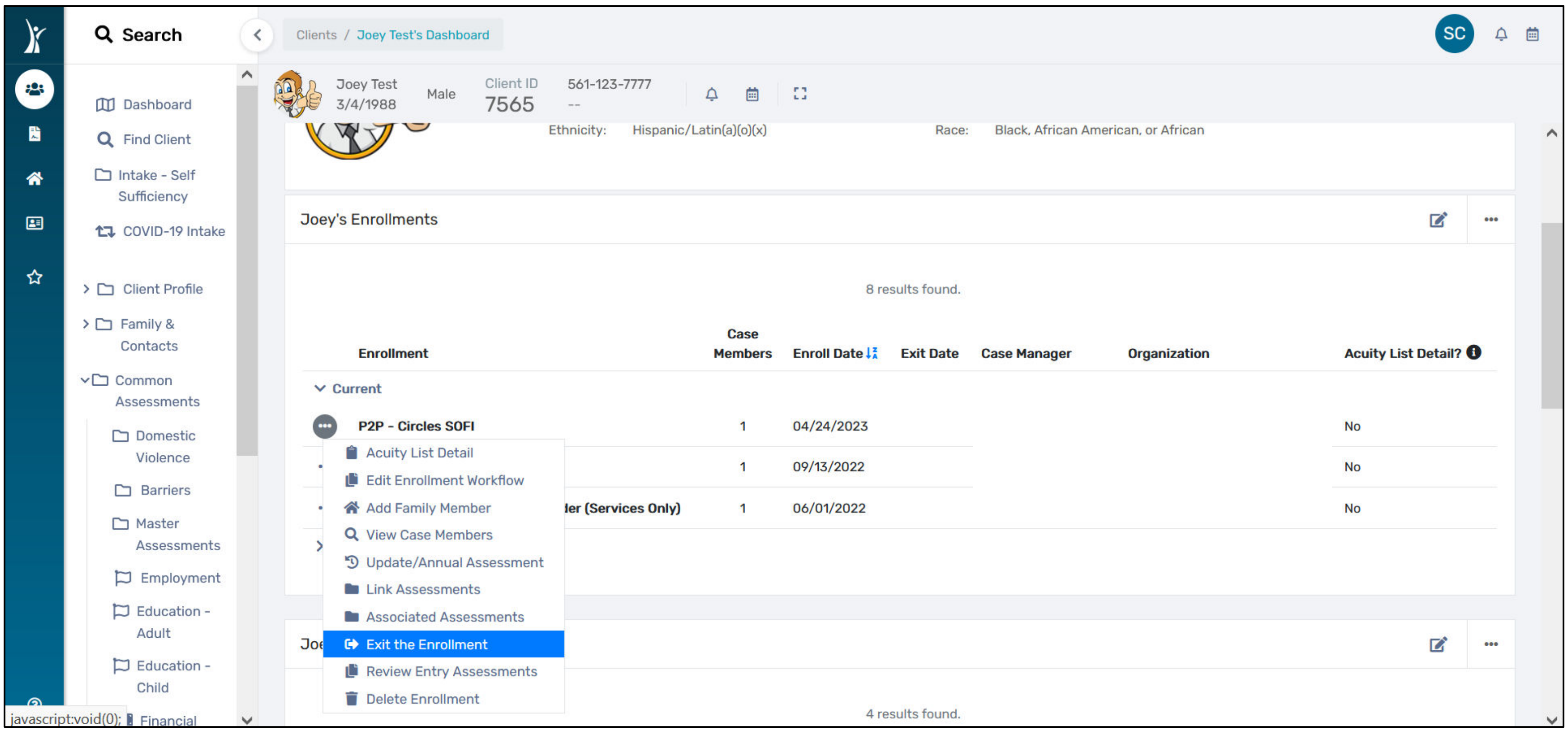
OUTCOME ENTRY & REPORTING: Homelessness

Individuals do not return to homelessness

This outcome is based on the client's exit from the program and their reentry into the Homelessness system.

To enter Exit Destination information:

- Go to the client page in ClientTrack
- Click on the action dropdown "(…)" to the left of your client's enrollment into your program and select 'Exit the Enrollment'



OUTCOME ENTRY & REPORTING: Homelessness

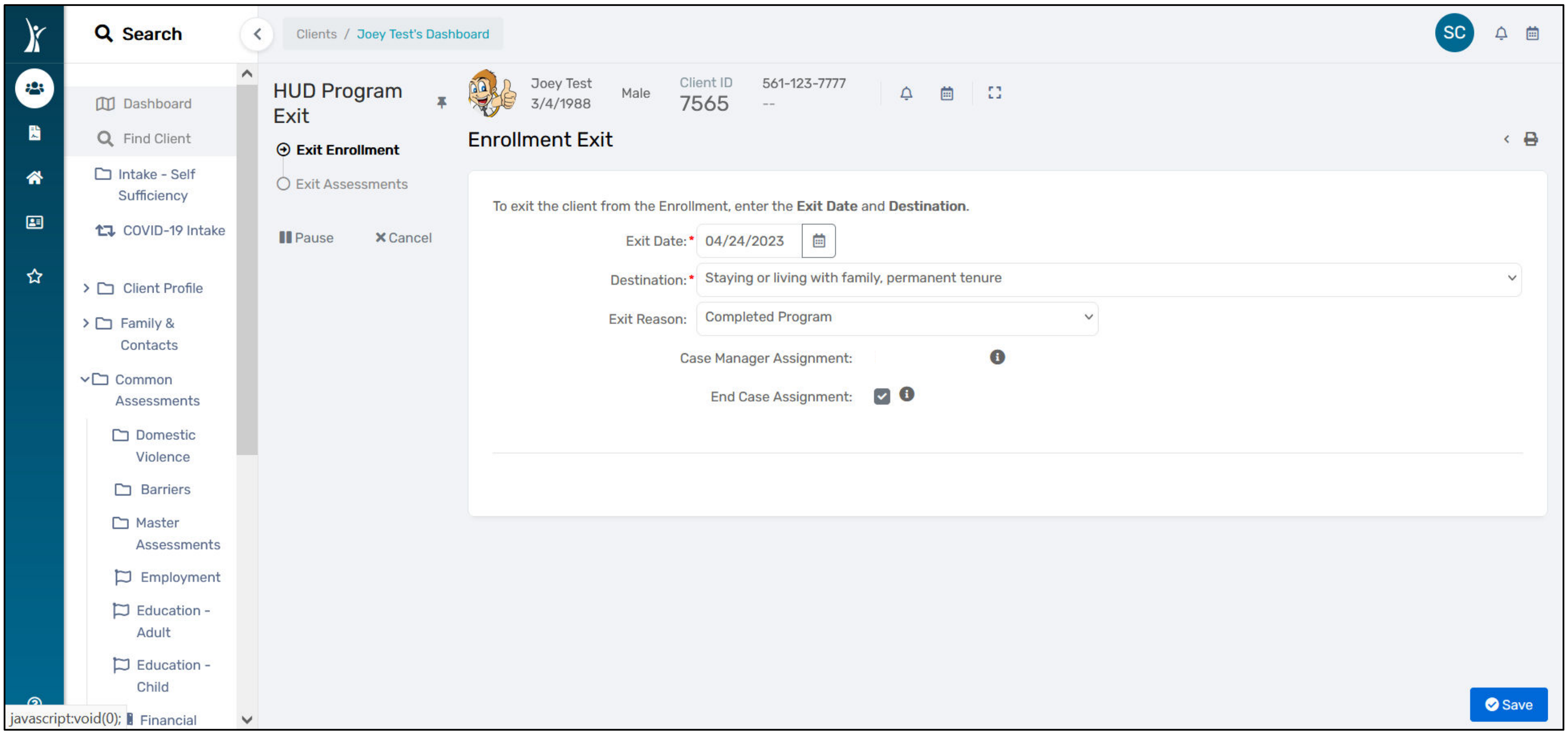
Individuals do not return to homelessness

To enter Exit Destination information (cont.):

- Complete the Enrollment Exit (i.e. Exit Date, Destination, Exit Reason) and press "Save"

➢ Complete the Universal Data Assessment, the Barriers/Special Needs Assessment, and the Income Assessment

➢ When complete, press "Finish" to close the workflow

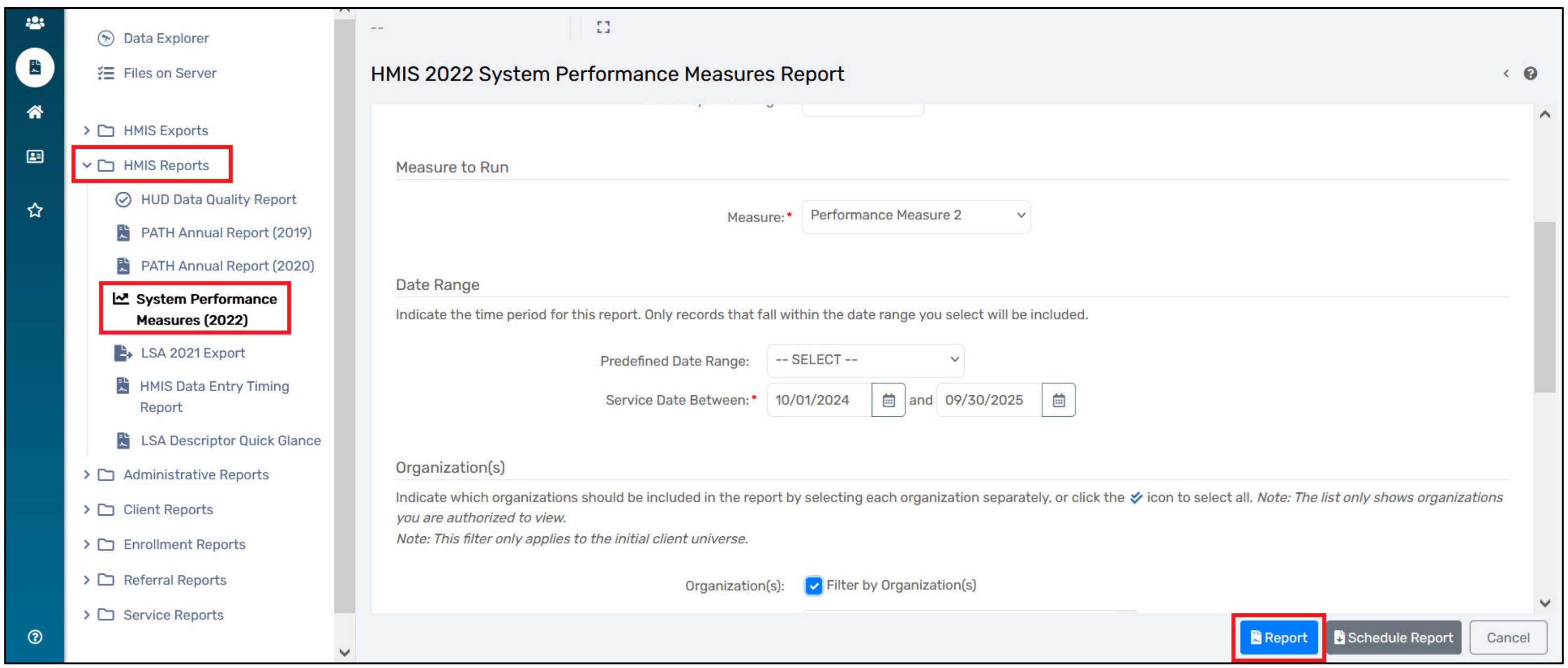


OUTCOME ENTRY & REPORTING: Homelessness

Individuals do not return to homelessness

To run a report for Returns to Homelessness:

- Go to the Reports page in ClientTrack
- Click on 'HMIS Reports' from the left panel and select "System Performance Measures (2022)"
- Complete the necessary fields to obtain the report for your program (i.e. Measure to Run, Date range, Organization, Program)
  - Measure should be 'Performance Measure 2'
  - Note that when running this report, the date range should be two (2) years in the future based on the beginning of the current fiscal year (i.e. if the current fiscal year starts on 10/1/2022 and ends on 9/30/2023, then the report dates should be 10/1/2024 to 9/30/2025)

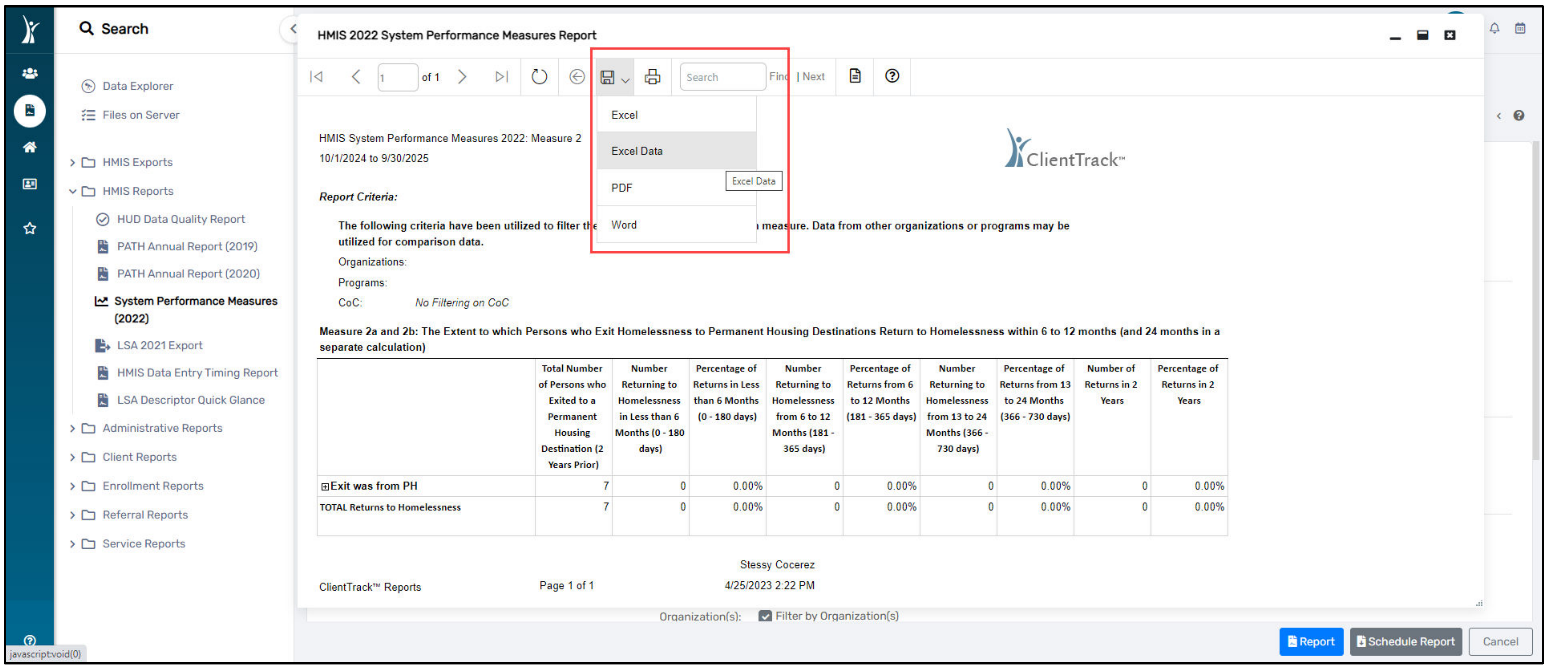


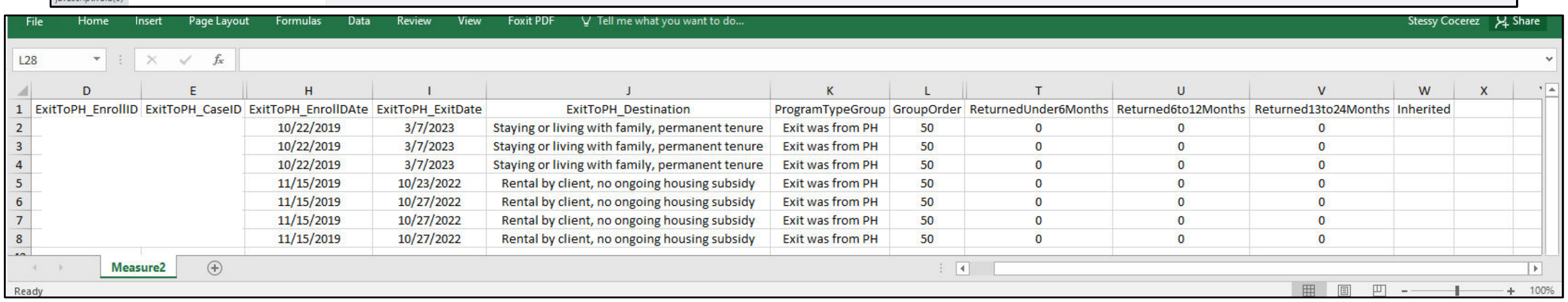
OUTCOME ENTRY & REPORTING: Homelessness

Individuals do not return to homelessness

To run a report for Returns to Homelessness (cont.):

- Once complete, press "Report"
- When the report populates, click on the save icon to reveal a dropdown and export the report to Excel Data





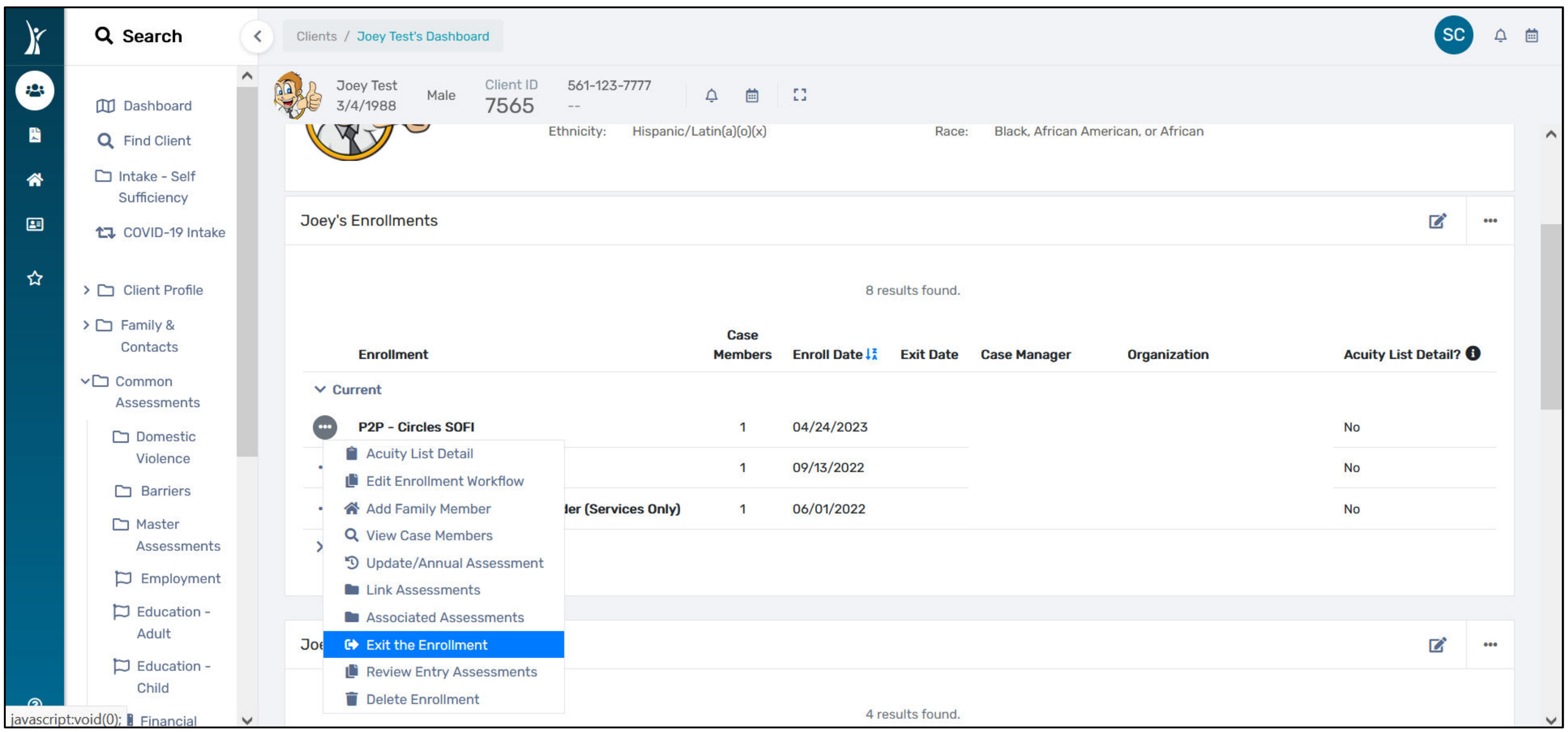
OUTCOME ENTRY & REPORTING: Homelessness

Individuals remain in, or exit, to Permanent Housing locations

This outcome is based on the client's Exit Destination after leaving the program OR their current living status as an enrollee in a Permanent Housing location.

To enter Exit Destination information:

- Go to the client page in ClientTrack
- Click on the action dropdown "(…)" to the left of your client's enrollment into your program and select 'Exit the Enrollment'



OUTCOME ENTRY & REPORTING: Homelessness

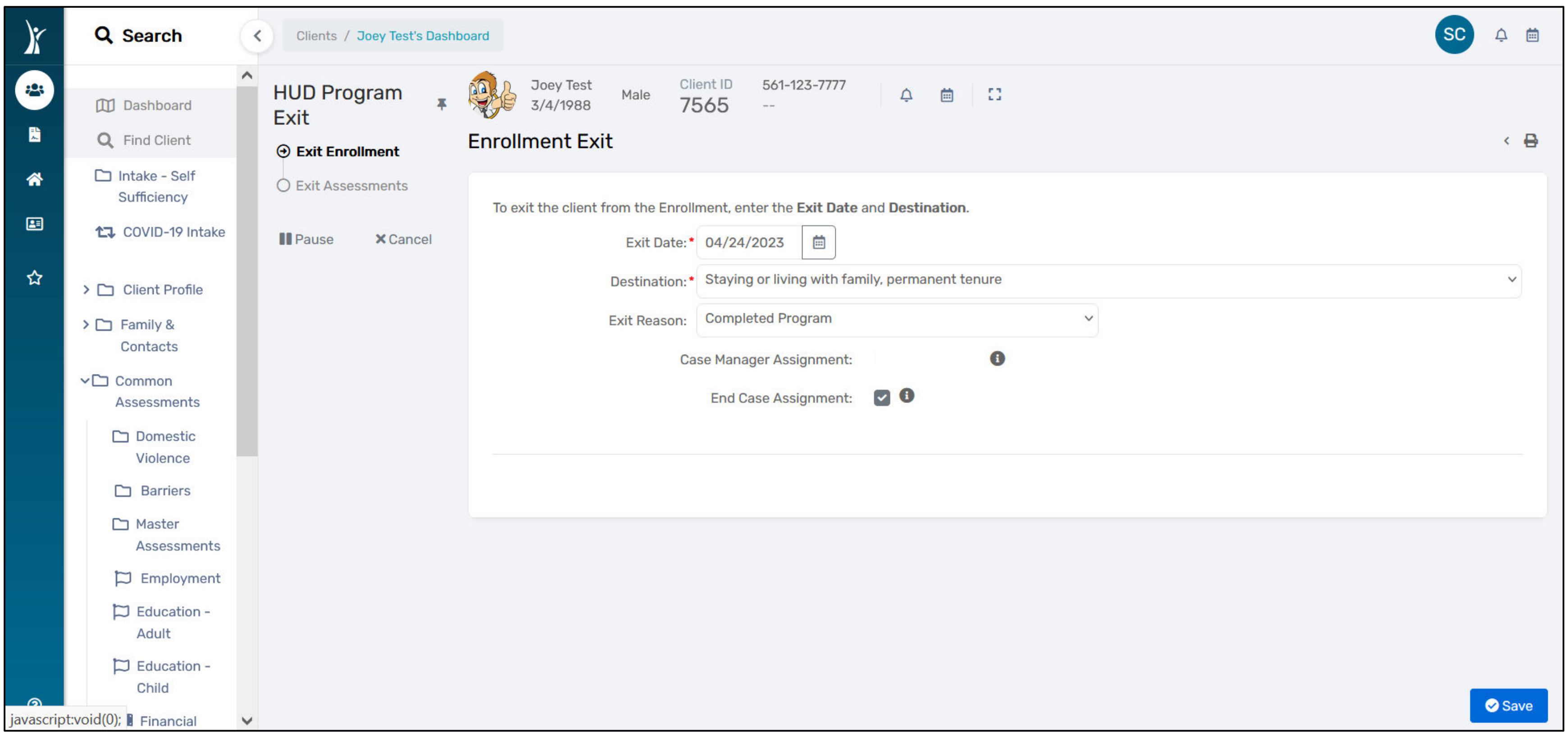
Individuals remain in, or exit, to Permanent Housing locations

To enter Exit Destination information (cont.):

- Complete the Enrollment Exit (i.e. Exit Date, Destination, Exit Reason) and press "Save"

➢ Complete the Universal Data Assessment, the Barriers/Special Needs Assessment, and the Income Assessment

➢ When complete, press "Finish" to close the workflow

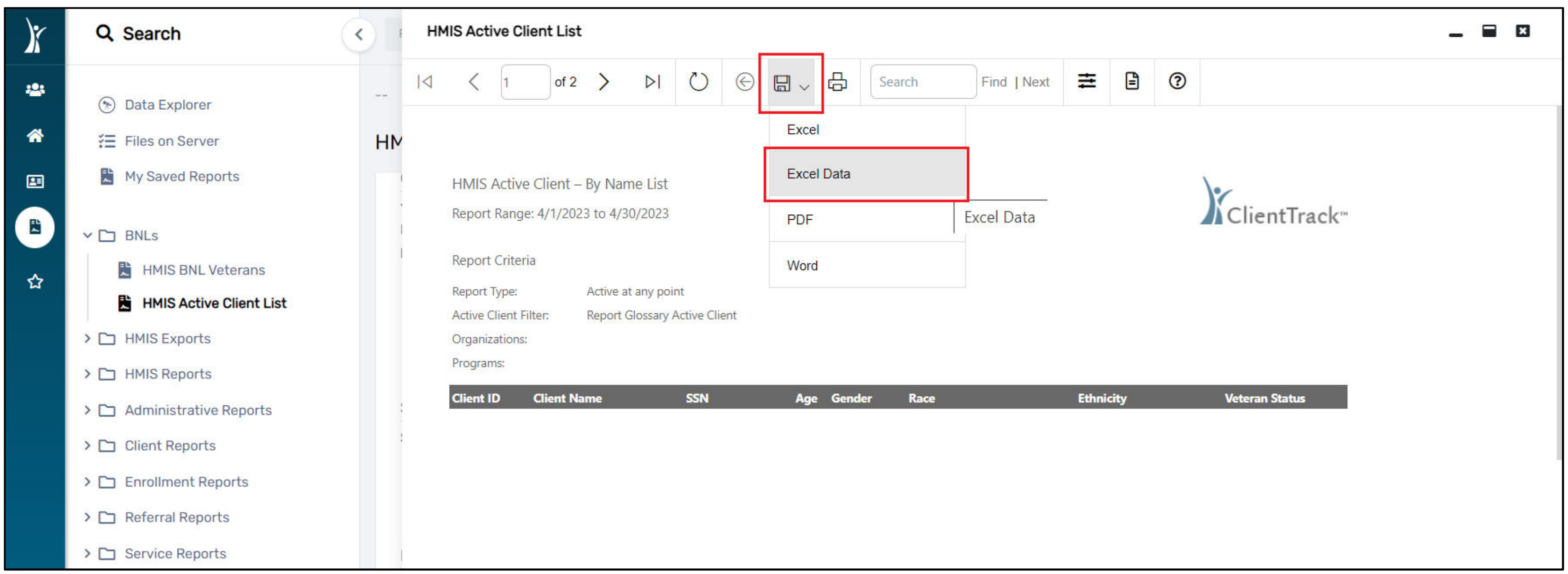


OUTCOME ENTRY & REPORTING: Homelessness

Individuals remain in, or exit, to Permanent Housing locations

To run a report to display Exit Destination:

- Ensure you are in the correct workgroup (***HMIS User***)
- Go to the Reports page in ClientTrack
- Click on 'BNLs' from the left panel and select "HMIS Active Client List"
- Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program, Head of Household – if applicable) and press 'Report'
- When the report populates, click on the save icon to reveal a dropdown and export the report to Excel Data
- Within the report, look at the columns for Exit Destinations to identify which are considered 'Permanent'
    - If client is still enrolled in a Permanent Housing program, they are also considered a positive outcome



OUTCOME ENTRY & REPORTING: Homelessness

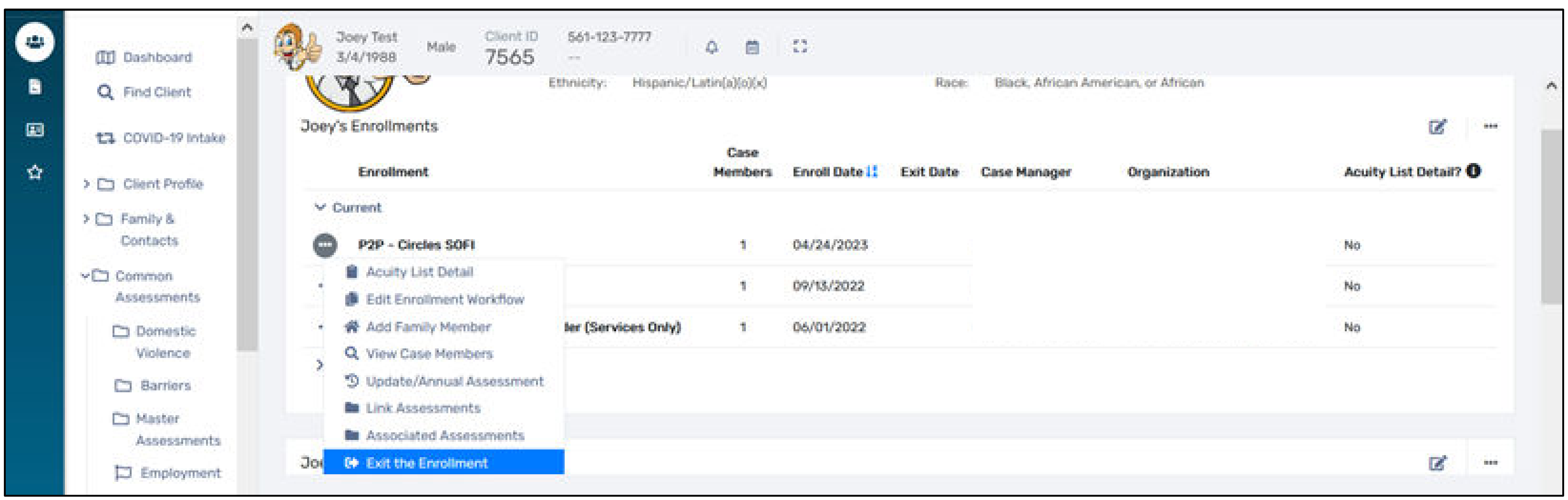
Individuals maintain their Permanent housing after receiving financial assistance

This outcome is based on the client's Exit Destination after receiving financial assistance. Clients should remain open until the designated time period has passed to conduct a follow-up assessment. Once the follow-up assessment is complete, the client should be exited from the program enrollment.

The financial assistance should be indicated as a service. Please follow directions on pages 5-6 for how to enter services.

To enter Exit Destination information:

- Go to the client page in ClientTrack
- Click on the action dropdown "(…)" to the left of your client's enrollment into your program and select 'Exit the Enrollment'



OUTCOME ENTRY & REPORTING: Homelessness

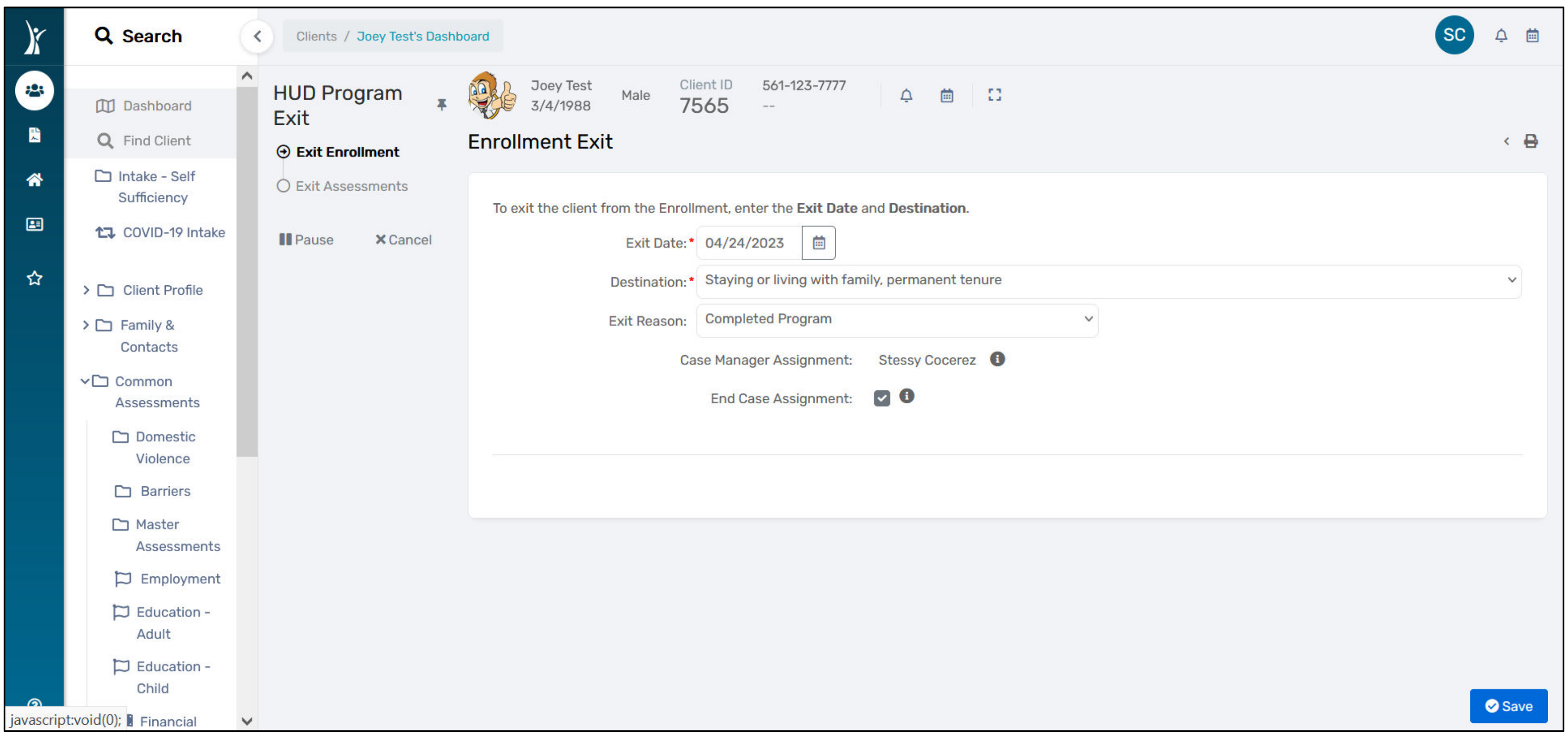
Individuals maintain their Permanent housing after receiving financial assistance

To enter Exit Destination information (cont.):

- Complete the Enrollment Exit (i.e. Exit Date, Destination, Exit Reason) and press "Save"

➢ Complete the Universal Data Assessment, the Barriers/Special Needs Assessment, and the Income Assessment

➢ When complete, press "Finish" to close the workflow

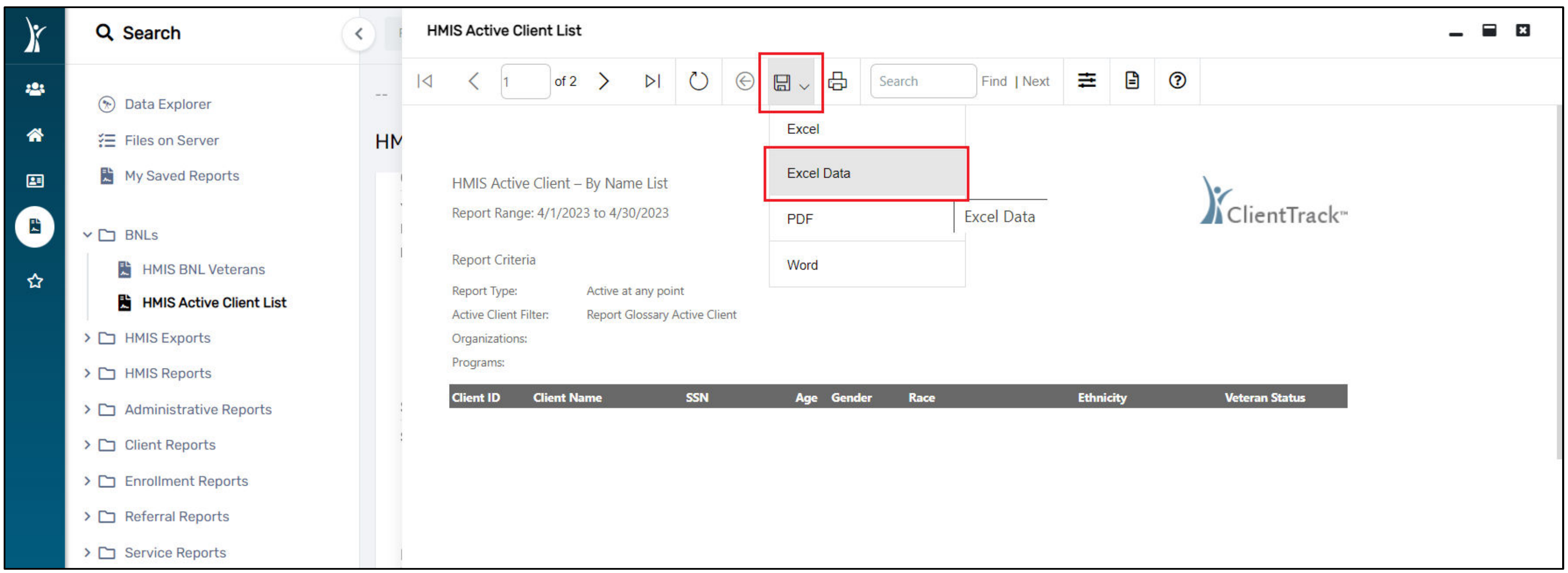


OUTCOME ENTRY & REPORTING: Homelessness

Individuals maintain their Permanent housing after receiving financial assistance

To run a report to display Exit Destination:

- Ensure you are in the correct workgroup (***HMIS User***)
- Go to the Reports page in ClientTrack
- Click on 'BNLs' from the left panel and select "HMIS Active Client List"
- Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program, Head of Household – if applicable) and press 'Report'
- When the report populates, click on the save icon to reveal a dropdown and export the report to Excel Data
- Within the report, look at the columns for Exit Destinations to identify which are considered 'Permanent'



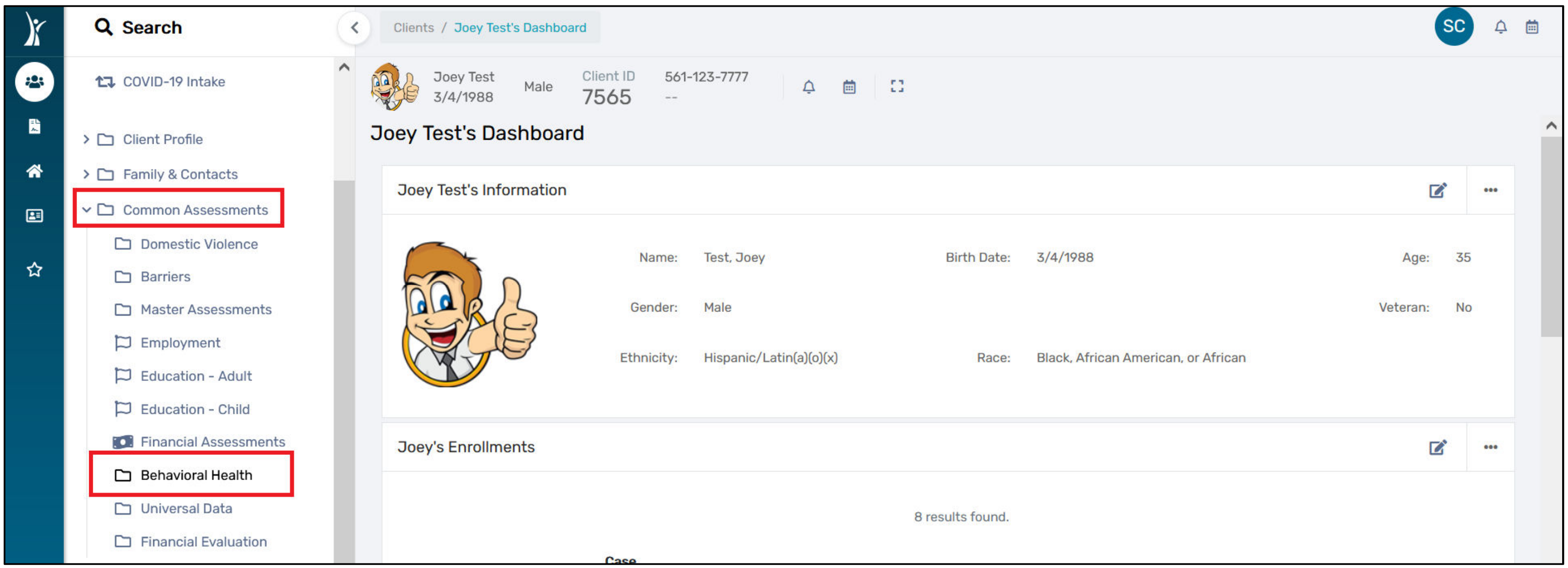
OUTCOME ENTRY & REPORTING: Behavioral Health

Individuals will improve their level of functioning on post-assessment score compared to the pre-assessment baseline score on the Behavioral Health Assessment (BHA)

This outcome is based on the Behavioral Health Assessment tool. At least two (2) assessments are necessary in order to assess a change.

To complete the Behavioral Health Assessment:

- Go to the client page in ClientTrack
- Click on "Common Assessments" from the left pane, then click on "Behavioral Health"

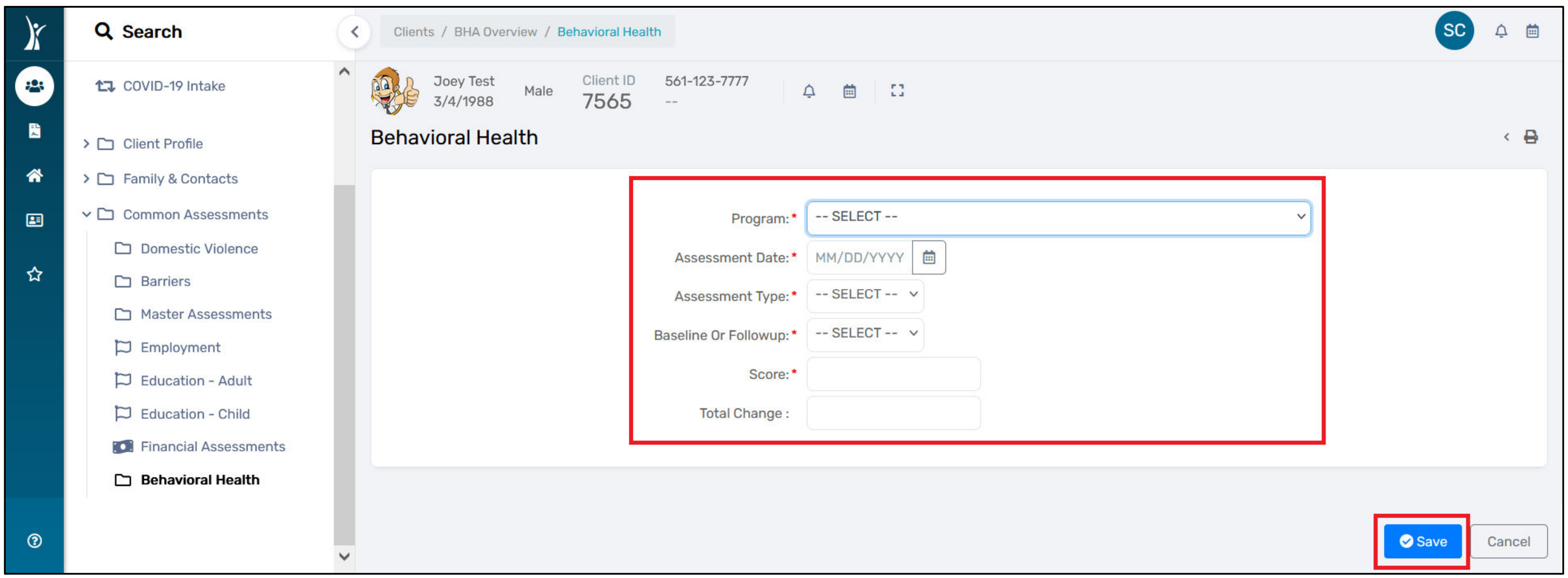


OUTCOME ENTRY & REPORTING: Behavioral Health

Individuals will improve their level of functioning on post-assessment score compared to the pre-assessment baseline score on the Behavioral Health Assessment (BHA)

To complete the Behavioral Health Assessment (cont.):

- Click on "Add New"
  - Complete all the necessary fields (i.e. Program, Assessment Date, Assessment Type, Baseline or Followup, Score)
  - To ensure you are completing the correct assessment, please make sure to select 'BHA' from the Assessment Type dropdown
- For followup assessments, repeat the aforementioned steps with updated Dates, Types, Baseline or Followup, and Score.

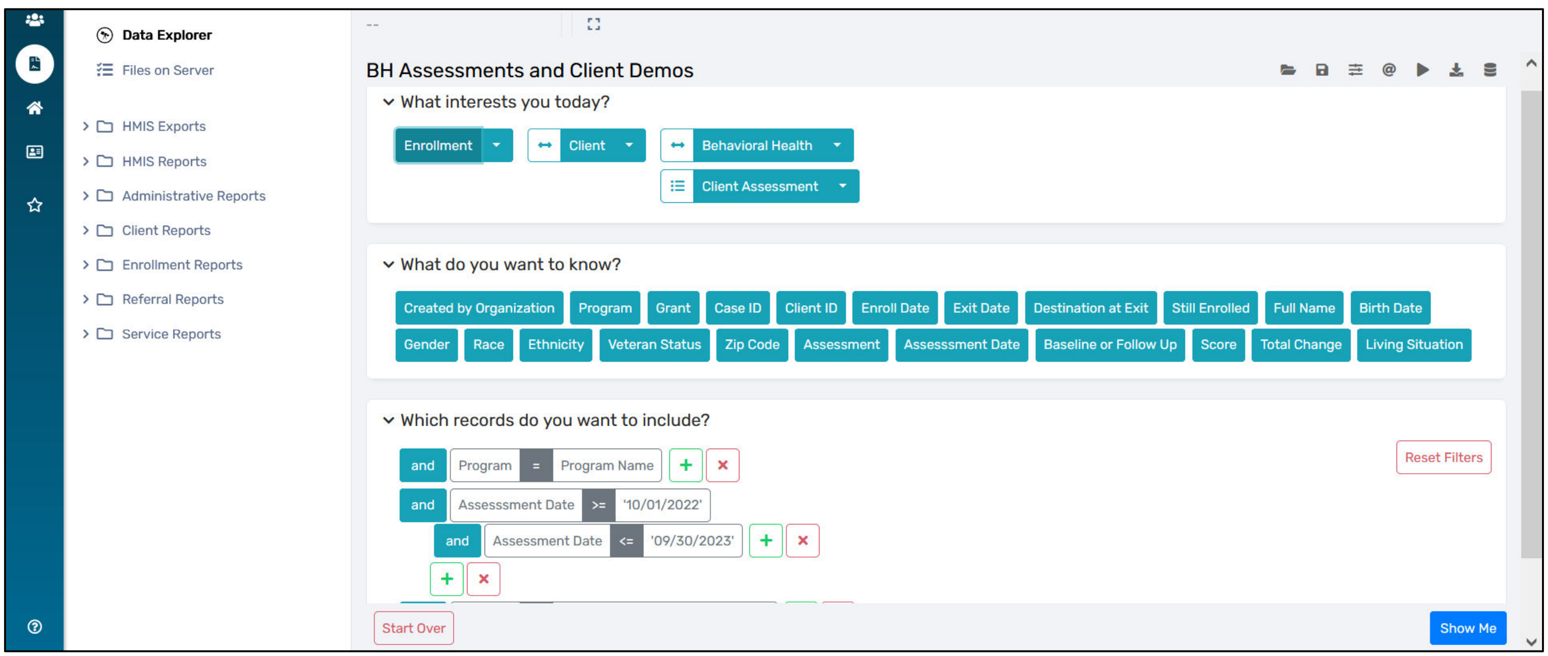


OUTCOME ENTRY & REPORTING: Behavioral Health

Individuals will improve their level of functioning on post-assessment score compared to the pre-assessment baseline score on the Behavioral Health Assessment (BHA)

To run a report for the Behavioral Health Assessments:

- ➢ Go to the Reports page in ClientTrack
- ➢ Click on ‘Data Explorer’ from the left panel and de-select “Only Show My Questions”
  - ○ In the search field, type in “BH” and press enter
  - ○ Click the stacked paper icon to the left of the report to make a copy of the ‘BH Assessments and Client Demos’ report (by SCocerez created on 4/24/2023); rename as you wish
  - ○ Under “Which records do you want to include?”, only adjust the dates and the Program Name; leave the rest of the setup as is.

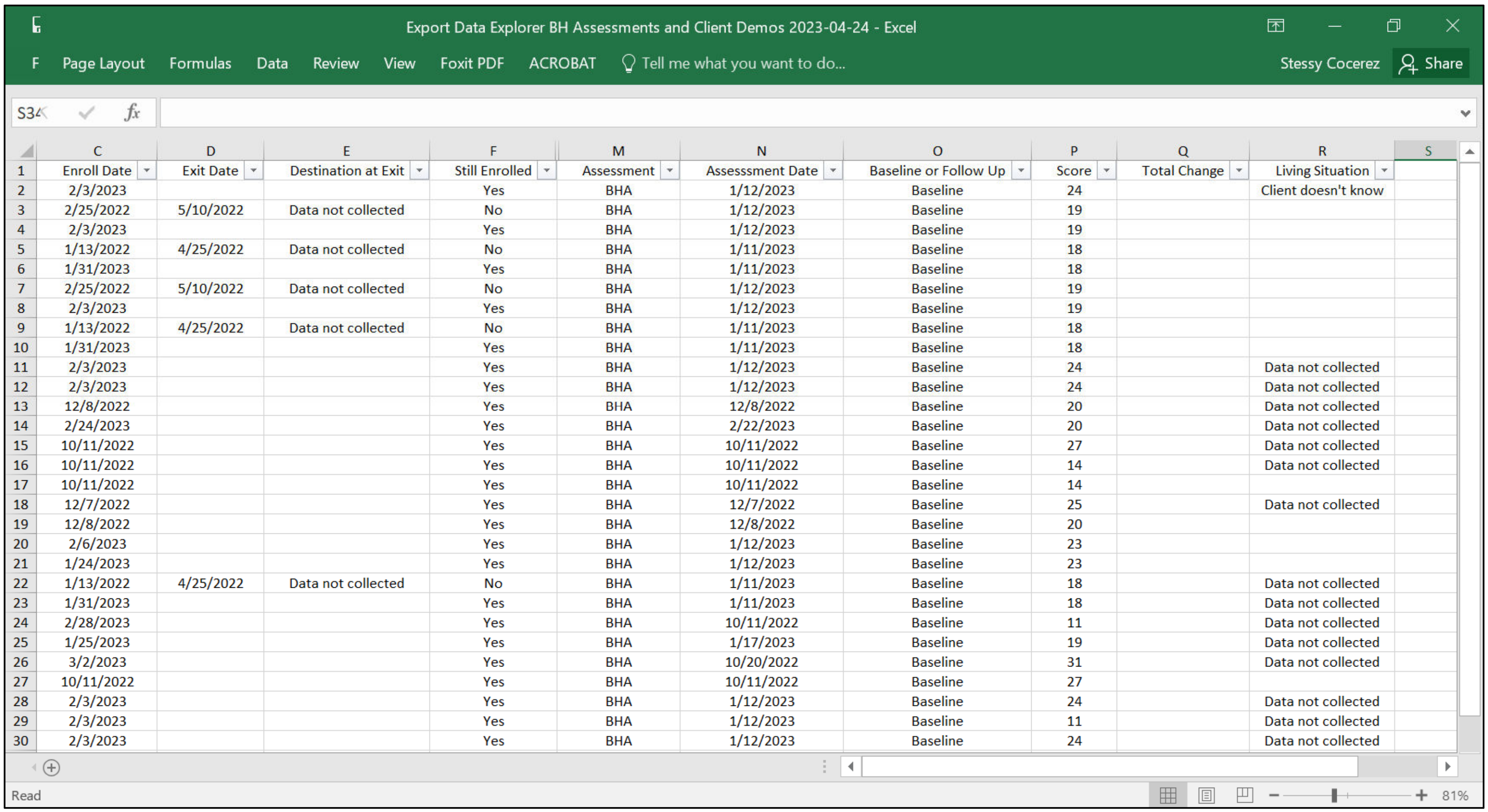


OUTCOME ENTRY & REPORTING: Behavioral Health

Individuals will improve their level of functioning on post-assessment score compared to the pre-assessment baseline score on the Behavioral Health Assessment (BHA)

To run a report for the Behavioral Health Assessments (cont.):

- After you click "Show Me", export the resulting report to 'Excel Data' by clicking the download icon to the top right of the report popup



	Enroll Date	Exit Date	Destination at Exit	Still Enrolled	Assessment	Assessment Date	Baseline or Follow Up	Score	Total Change	Living Situation
2	2/3/2023			Yes	BHA	1/12/2023	Baseline	24		Client doesn't know
3	2/25/2022	5/10/2022	Data not collected	No	BHA	1/12/2023	Baseline	19		
4	2/3/2023			Yes	BHA	1/12/2023	Baseline	19		
5	1/13/2022	4/25/2022	Data not collected	No	BHA	1/11/2023	Baseline	18		
6	1/31/2023			Yes	BHA	1/11/2023	Baseline	18		
7	2/25/2022	5/10/2022	Data not collected	No	BHA	1/12/2023	Baseline	19		
8	2/3/2023			Yes	BHA	1/12/2023	Baseline	19		
9	1/13/2022	4/25/2022	Data not collected	No	BHA	1/11/2023	Baseline	18		
10	1/31/2023			Yes	BHA	1/11/2023	Baseline	18		
11	2/3/2023			Yes	BHA	1/12/2023	Baseline	24		Data not collected
12	2/3/2023			Yes	BHA	1/12/2023	Baseline	24		Data not collected
13	12/8/2022			Yes	BHA	12/8/2022	Baseline	20		Data not collected
14	2/24/2023			Yes	BHA	2/22/2023	Baseline	20		Data not collected
15	10/11/2022			Yes	BHA	10/11/2022	Baseline	27		Data not collected
16	10/11/2022			Yes	BHA	10/11/2022	Baseline	14		Data not collected
17	10/11/2022			Yes	BHA	10/11/2022	Baseline	14		
18	12/7/2022			Yes	BHA	12/7/2022	Baseline	25		Data not collected
19	12/8/2022			Yes	BHA	12/8/2022	Baseline	20		
20	2/6/2023			Yes	BHA	1/12/2023	Baseline	23		
21	1/24/2023			Yes	BHA	1/12/2023	Baseline	23		
22	1/13/2022	4/25/2022	Data not collected	No	BHA	1/11/2023	Baseline	18		Data not collected
23	1/31/2023			Yes	BHA	1/11/2023	Baseline	18		Data not collected
24	2/28/2023			Yes	BHA	10/11/2022	Baseline	11		Data not collected
25	1/25/2023			Yes	BHA	1/17/2023	Baseline	19		Data not collected
26	3/2/2023			Yes	BHA	10/20/2022	Baseline	31		Data not collected
27	10/11/2022			Yes	BHA	10/11/2022	Baseline	27		
28	2/3/2023			Yes	BHA	1/12/2023	Baseline	24		Data not collected
29	2/3/2023			Yes	BHA	1/12/2023	Baseline	11		Data not collected
30	2/3/2023			Yes	BHA	1/12/2023	Baseline	24		Data not collected

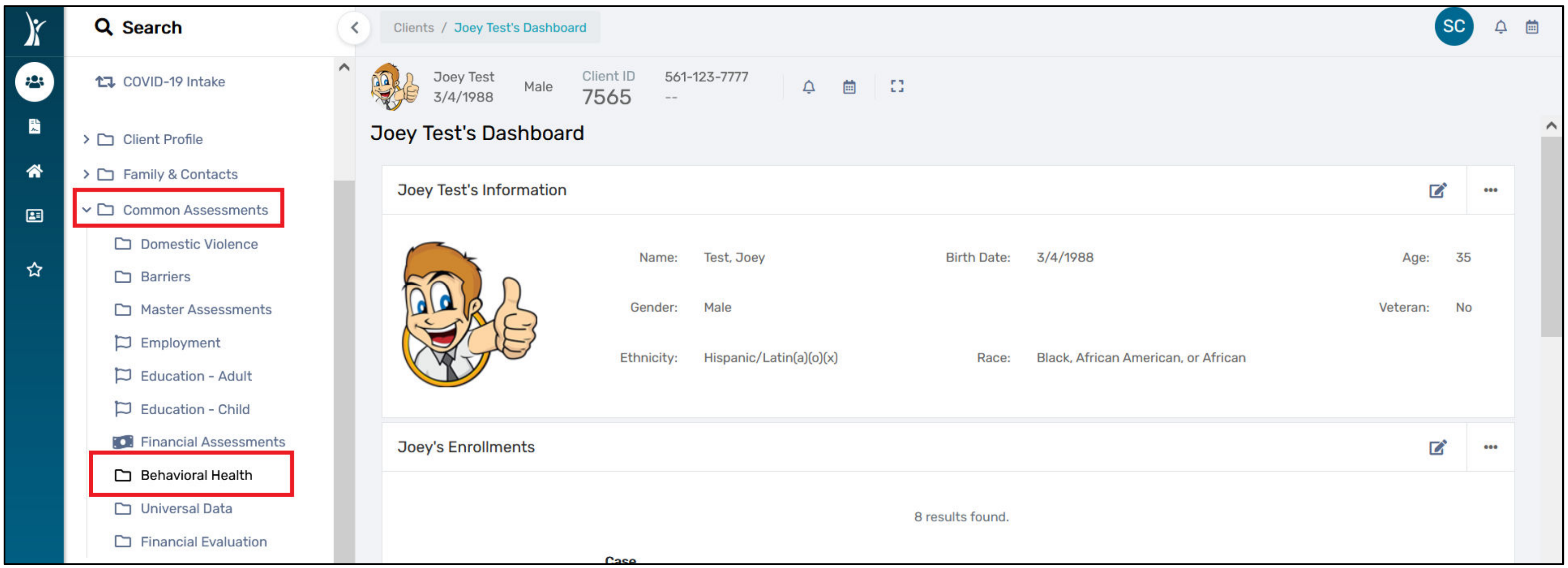
OUTCOME ENTRY & REPORTING: Behavioral Health

Individuals will improve their level of functioning score as measured by a decrease score of at least 1 point on the CFARS/FARS from their baseline score at admission within the fiscal year

This outcome is based on the CFARS/FARS assessment tool. At least two (2) assessments are necessary in order to assess a change.

To complete the CFARS/FARS assessment:

- ➢ Go to the client page in ClientTrack
- ➢ Click on “Common Assessments” from the left pane, then click on “Behavioral Health”

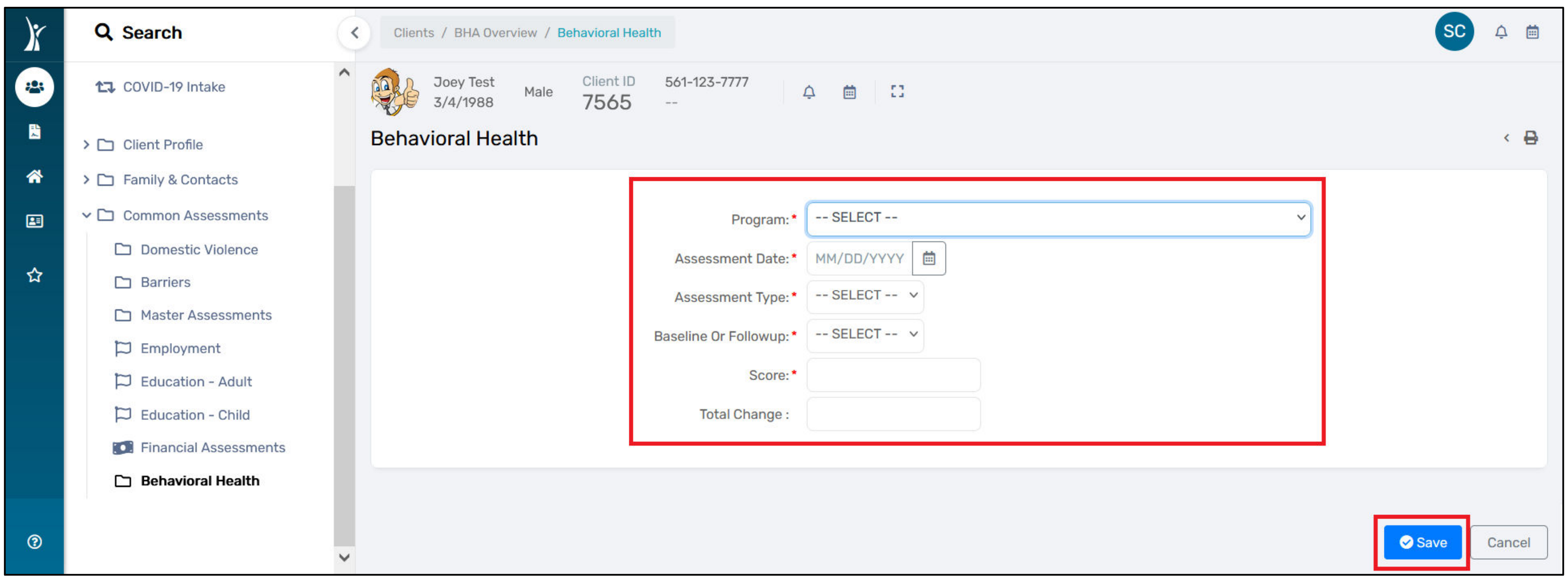


OUTCOME ENTRY & REPORTING: Behavioral Health

Individuals will improve their level of functioning score as measured by a decrease score of at least 1 point on the CFARS/FARS from their baseline score at admission within the fiscal year

To complete the CFARS/FARS (cont.):

- Click on "Add New"
  - Complete all the necessary fields (i.e. Program, Assessment Date, Assessment Type, Baseline or Followup, Score)
  - To ensure you are completing the correct assessment, please make sure to select 'CFARS' or 'FARS' from the Assessment Type dropdown
- For followup assessments, repeat the aforementioned steps with updated Dates, Types, Baseline or Followup, and Score.

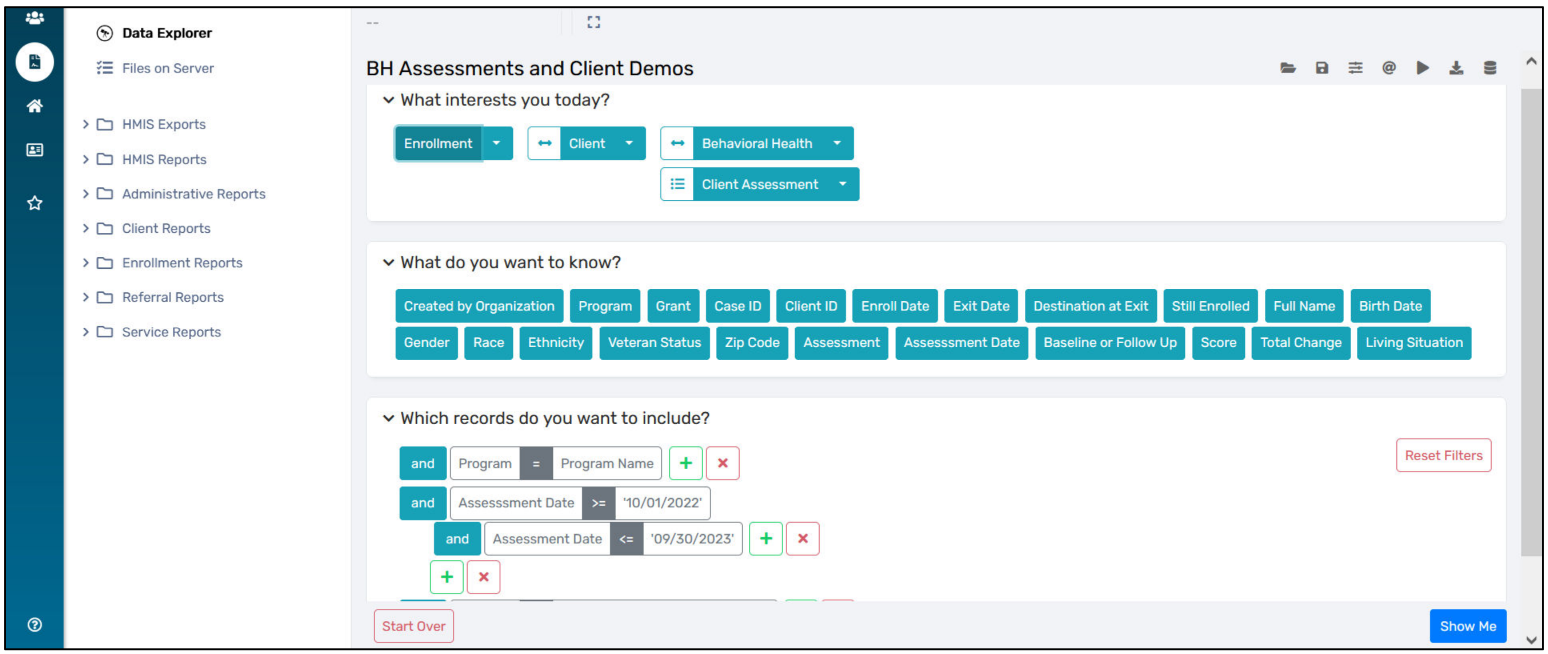


OUTCOME ENTRY & REPORTING: Behavioral Health

Individuals will improve their level of functioning score as measured by a decrease score of at least 1 point on the CFARS/FARS from their baseline score at admission within the fiscal year

To run a report for the CFARS/FARS:

- Go to the Reports page in ClientTrack
- Click on 'Data Explorer' from the left panel and de-select "Only Show My Questions"
  - In the search field, type in "BH" and press enter
  - Click the stacked paper icon to the left of the report to make a copy of the 'BH Assessments and Client Demos' report (by SCocerez created on 4/24/2023); rename as you wish
  - Under "Which records do you want to include?", only adjust the dates and the Program Name; leave the rest of the setup as is.

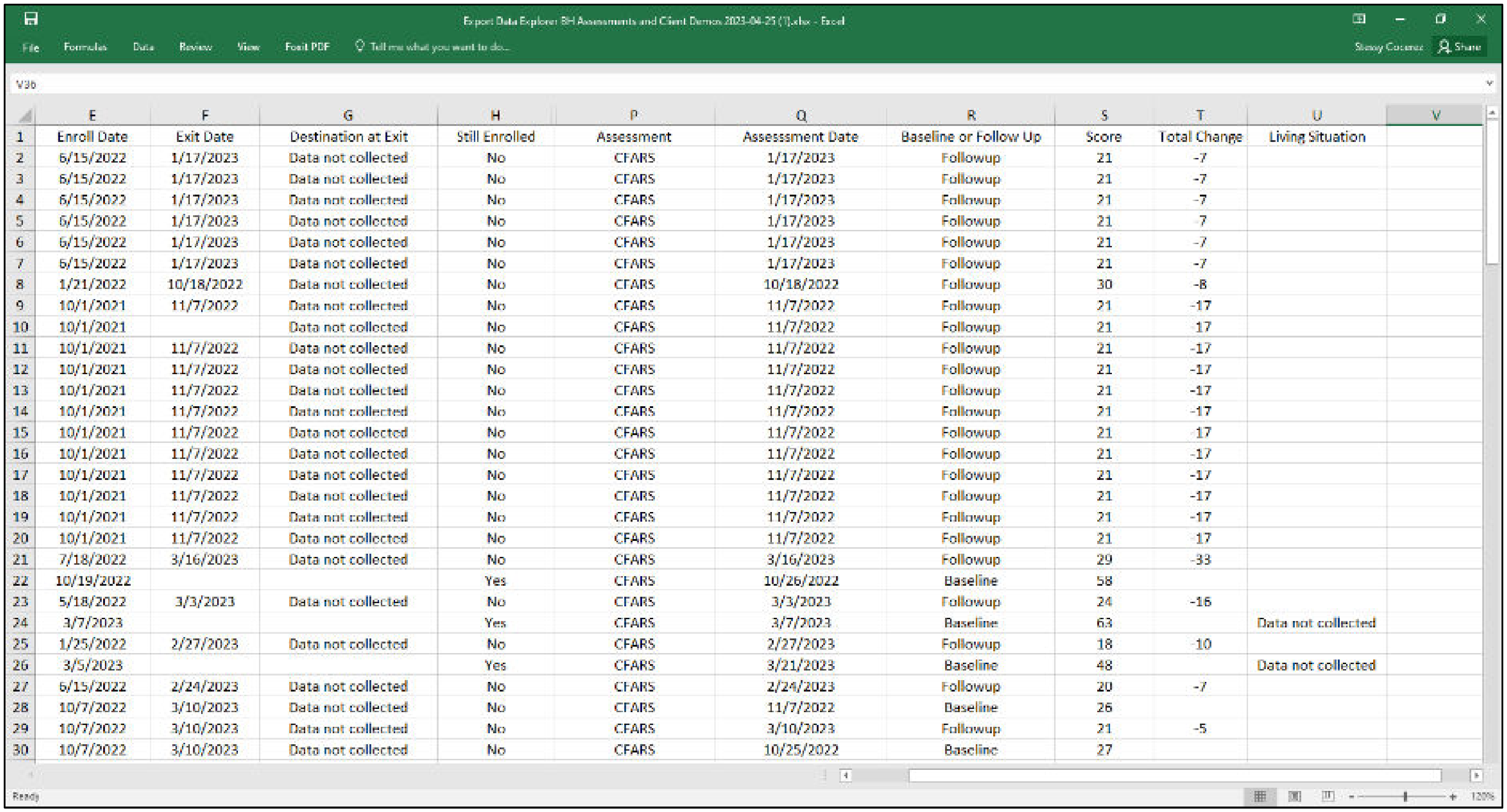


OUTCOME ENTRY & REPORTING: Behavioral Health

Individuals will improve their level of functioning score as measured by a decrease score of at least 1 point on the CFARS/FARS from their baseline score at admission within the fiscal year

To run a report for the CFARS/FARS (cont.):

➢ After you click “Show Me”, export the resulting report to ‘Excel Data’ by clicking the download icon to the top right of the report popup



	E	F	G	H	P	Q	R	S	T	U	V
1	Enroll Date	Exit Date	Destination at Exit	Still Enrolled	Assessment	Assessment Date	Baseline or Follow Up	Score	Total Change	Living Situation	
2	6/15/2022	1/17/2023	Data not collected	No	CFARS	1/17/2023	Followup	21	-7		
3	6/15/2022	1/17/2023	Data not collected	No	CFARS	1/17/2023	Followup	21	-7		
4	6/15/2022	1/17/2023	Data not collected	No	CFARS	1/17/2023	Followup	21	-7		
5	6/15/2022	1/17/2023	Data not collected	No	CFARS	1/17/2023	Followup	21	7		
6	6/15/2022	1/17/2023	Data not collected	No	CFARS	1/17/2023	Followup	21	-7		
7	6/15/2022	1/17/2023	Data not collected	No	CFARS	1/17/2023	Followup	21	-7		
8	1/21/2022	10/18/2022	Data not collected	No	CFARS	10/18/2022	Followup	30	-8		
9	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
10	10/1/2021		Data not collected	No	CFARS	11/7/2022	Followup	21	17		
11	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
12	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
13	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
14	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
15	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
16	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
17	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
18	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
19	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
20	10/1/2021	11/7/2022	Data not collected	No	CFARS	11/7/2022	Followup	21	-17		
21	7/18/2022	3/16/2023	Data not collected	No	CFARS	3/16/2023	Followup	29	-33		
22	10/19/2022			Yes	CFARS	10/26/2022	Baseline	58			
23	5/18/2022	3/3/2023	Data not collected	No	CFARS	3/3/2023	Followup	24	-16		
24	3/7/2023			Yes	CFARS	3/7/2023	Baseline	63		Data not collected	
25	1/25/2022	2/27/2023	Data not collected	No	CFARS	2/27/2023	Followup	18	-10		
26	3/5/2023			Yes	CFARS	3/21/2023	Baseline	48		Data not collected	
27	6/15/2022	2/24/2023	Data not collected	No	CFARS	2/24/2023	Followup	20	-7		
28	10/7/2022	3/10/2023	Data not collected	No	CFARS	11/7/2022	Baseline	26			
29	10/7/2022	3/10/2023	Data not collected	No	CFARS	3/10/2023	Followup	21	-5		
30	10/7/2022	3/10/2023	Data not collected	No	CFARS	10/25/2022	Baseline	27			

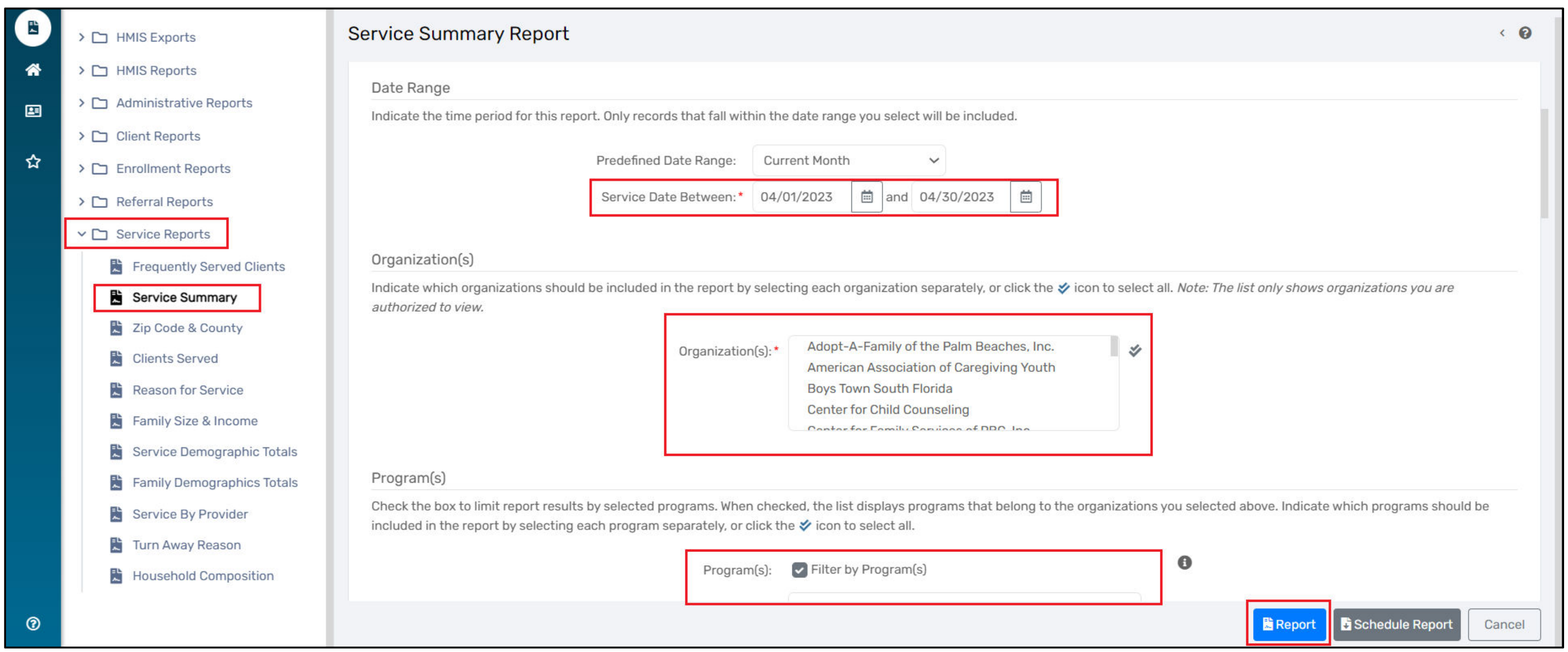
OUTCOME ENTRY & REPORTING: Behavioral Health

Program participants (families or youth) will receive a warm transfer to supportive services based on their designated plan during the fiscal year

This outcome is based on services (*see section on how to enter services*). The outcome is a proxy measured from the referral/supportive services entered into the database.

To run a Service Summary report:

- Go to the Reports page in CT
- Select 'Service Reports'
- Select 'Service Summary'
- Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program) and press 'Report'



<u>OUTCOME ENTRY & REPORTING: Strategic Partnerships</u>

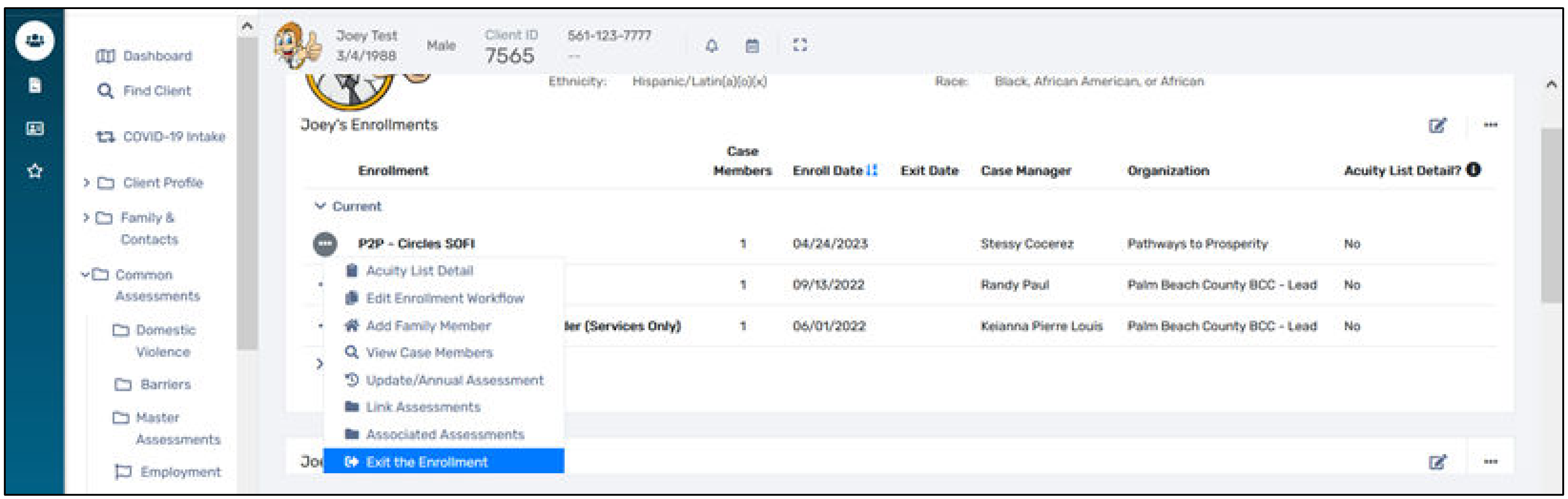
Individuals will receive a bus ticket to return home to their family and will not reenter the Palm Beach County Homeless system

This outcome is based on services (*see section on how to enter services*). The outcome is a proxy measured from the transportation services entered into the database. The transportation service should be entered when issued and a follow-up service indicating whether they are Stably Housed or Not Stably Housed should be inputted when the follow-up is conducted.

Due to the nature of this outcome, the client should also be exited from ClientTrack once the follow-up is complete.

To enter Exit Destination information:

- Go to the client page in ClientTrack
- Click on the action dropdown "(…)" to the left of your client's enrollment into your program and select 'Exit the Enrollment'

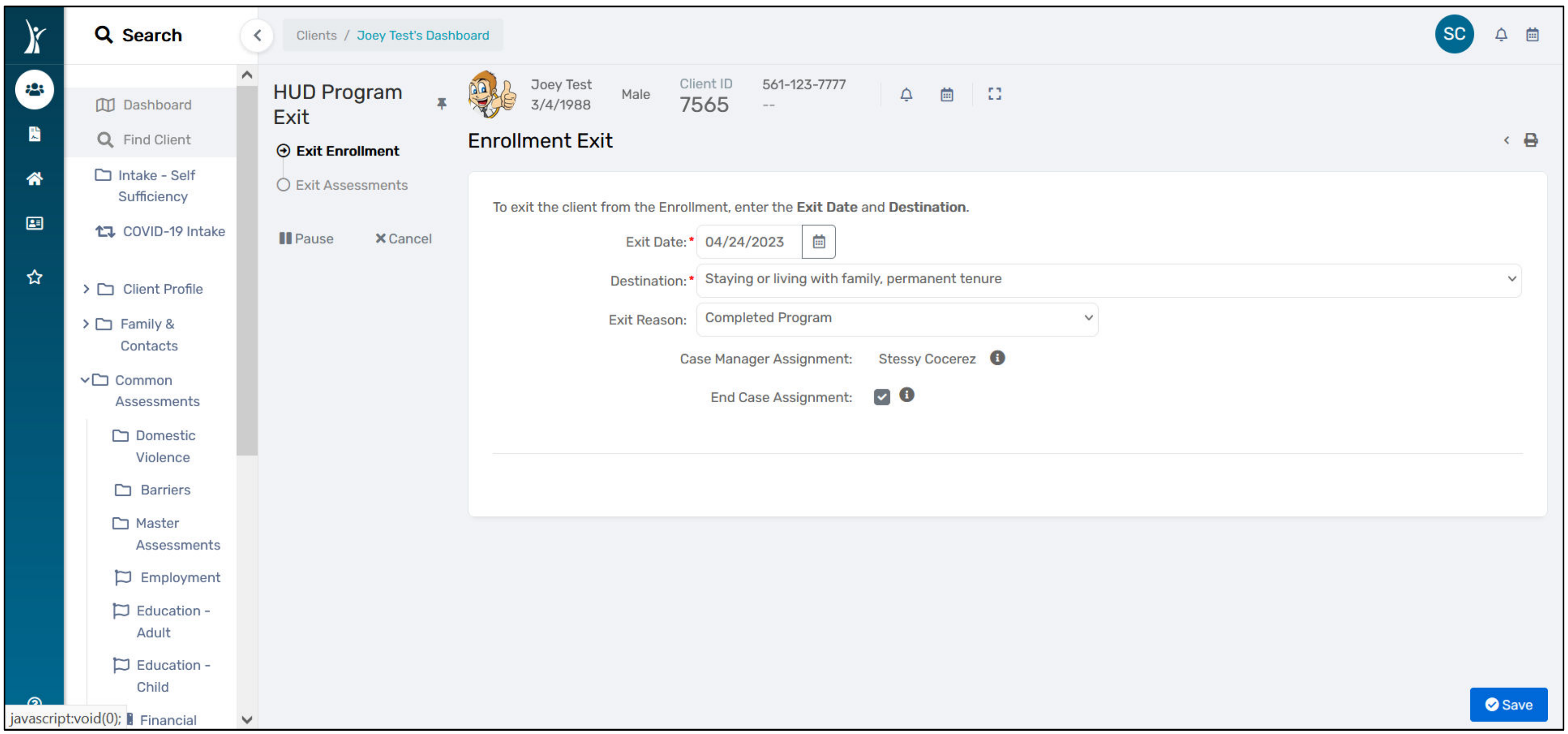


OUTCOME ENTRY & REPORTING: Strategic Partnerships

Individuals will receive a bus ticket to return home to their family and will not reenter the Palm Beach County Homeless system

To enter Exit Destination information (cont.):

- Complete the Enrollment Exit (i.e. Exit Date, Destination, Exit Reason) and press “Save”
- Complete the Universal Data Assessment, the Barriers/Special Needs Assessment, and the Income Assessment
- When complete, press “Finish” to close the workflow

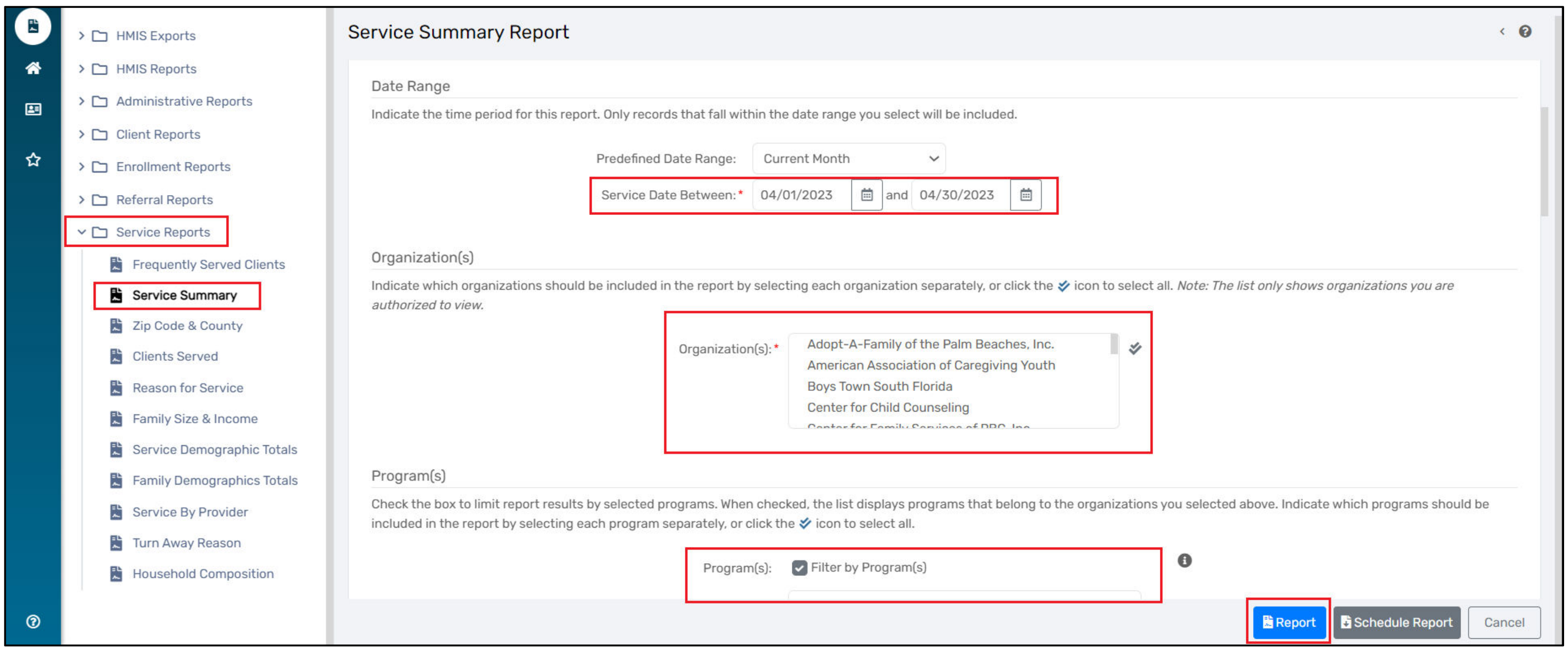


OUTCOME ENTRY & REPORTING: Strategic Partnerships

Individuals will receive a bus ticket to return home to their family and will not reenter the Palm Beach County Homeless system

To run a Service Summary report:

- Go to the Reports page in CT
- Select 'Service Reports'
- Select 'Service Summary'
- Complete the necessary fields to obtain the report for your program (i.e. Date range, Organization, Program) and press 'Report'



CONTACTS –

The Strategic Planning, Research, and Evaluation (SPRE) Team is tasked with collecting Outcome Quarter Reports and the supplemental data reports (to verify the numbers reported on the report and to ensure data entry into the assigned database is being done accurately). Each Strategic Planning and Performance Analyst II has been assigned a set group of programs to oversee in regards to the Quarter Reports. Feel free to reach out to your assigned SPRE member for any technical assistance as well.

Please submit Quarter Reports to your assigned SPRE team member and CC the CSD-ContractsManager email (CSD-ContactsManager@pbcgov.org). Questions can also be directed to this email.

Please note that Quarter Reports and their supplemental data reports are due by the following dates within the fiscal year:

- Quarter 1: January 15th
- Quarter 2: April 15th
- Quarter 3: July 15th
- Quarter 4: October 15th

NOTE: If the 15th falls on a weekend or a holiday, the due date will be the following business day.

Thank you