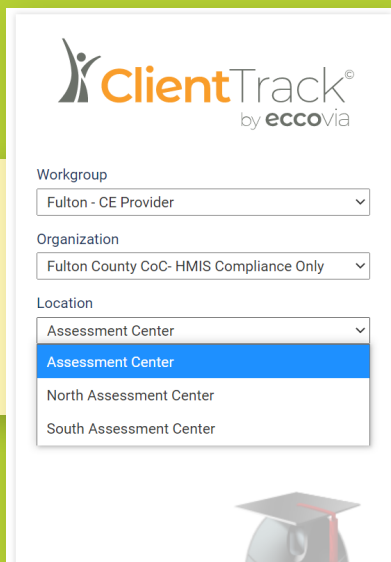


# ClientTrack Coordinated Entry Provider Procedures - Fulton County

## Sign in and Select the Correct Provider

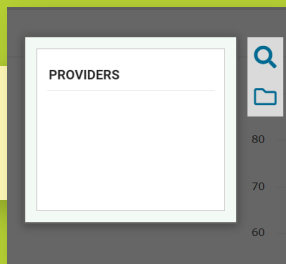
From the ClientTrack Sign In page



The image shows the ClientTrack login interface. At the top is the logo 'ClientTrack by eccovia'. Below it are three dropdown menus: 'Workgroup' with 'Fulton - CE Provider' selected, 'Organization' with 'Fulton County CoC- HMIS Compliance Only' selected, and 'Location' with 'Assessment Center' selected. The 'Assessment Center' dropdown is open, showing 'Assessment Center' (highlighted in blue), 'North Assessment Center', and 'South Assessment Center'. At the bottom of the form is a small icon of a graduation cap.

1. Sign in using settings...

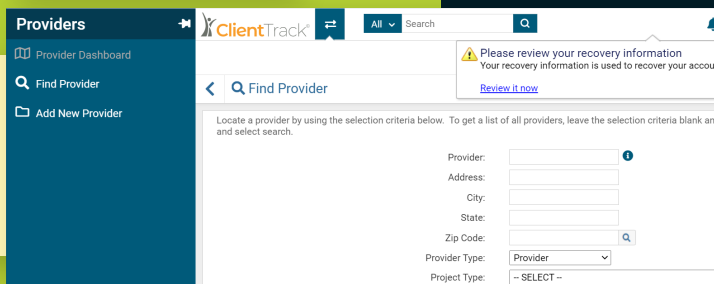
- a. Workgroup = Fulton CE Provider
- b. Organization = Your Organization
- c. Location = South or North Assessment Center



The image shows a sidebar for the 'PROVIDERS' workspace. It has a search icon at the top, followed by a folder icon. Below these are three numerical indicators: 80, 70, and 60.

2. Verify or select the desired Provider

- a. Switch to the **Providers** workspace



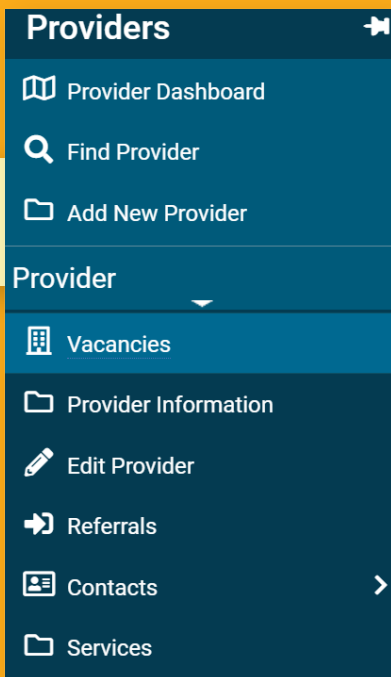
The image shows the ClientTrack Providers dashboard. On the left is a sidebar with 'Providers' at the top, followed by 'Provider Dashboard', 'Find Provider', and 'Add New Provider'. The main area has a header with 'ClientTrack' and 'All Search'. Below this is a 'Find Provider' section with a search bar and a list of providers. The search bar contains the text 'Find Provider'. Below the search bar are fields for 'Provider', 'Address', 'City', 'State', 'Zip Code', 'Provider Type' (dropdown), and 'Project Type' (dropdown). The 'Provider Type' dropdown is set to 'Provider' and the 'Project Type' dropdown is set to '-- SELECT --'. There is also a 'Please review your recovery information' warning message at the top right of the main area.

b. On the Provider's Dashboard

- i. Verify the Provider is correct, OR
- ii. Use the **Find Provider** menu to search and select the correct provider

# Create a New Vacancy

In the Provider Workspace



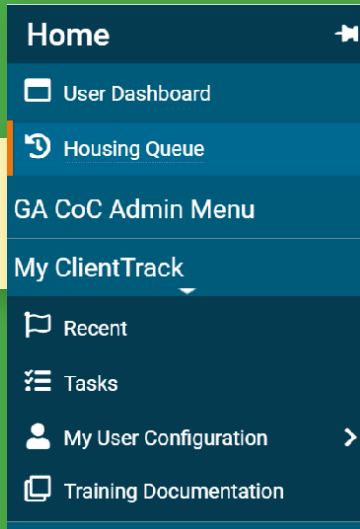
1. Select the **Vacancies** menu
2. Select the **+ Add New** button.

A screenshot of the '+Vacancy' form. The form has a light gray header with a back arrow and '+Vacancy' text. Below the header, it says 'Enter the data below to establish a new vacancy.' The form contains several fields: 'Description:' (text input), 'Location:' (text input with a red asterisk), 'Type:' (dropdown menu with '- SELECT -'), 'Start Date:' (text input with a red asterisk and a calendar icon), 'End Date:' (text input with a red asterisk and a calendar icon), 'Capacity:' (text input with an information icon), 'Percent Utilization:' (text input), 'Status:' (text input with a red asterisk), 'Room Preference:' (text input with an information icon), and 'Number of Bedrooms:' (text input).

3. Fill in the **Vacancy Assessment** form
4. **Save**

# Place a Referred Client in a Vacancy

## In the Home Workspace



1. Select the **Housing Queue** menu
2. Select the desired client's **Actions** [ ➤ ] menu

3. Select **Initiate Client Intake (Accept/Reject)** in the menu
4. Select  and continue to enroll them in the project
  - a. On the final workflow step (**Placement**) you **MUST** change the **Referral Status** field to **Placed**
  - b. Make sure the **Referral Date** and the **Assessment Date** are correct
  - c. You **MUST** complete the workflow correctly (see above) in **one** pass

A screenshot of the 'Initiate Intake' form for 'Universal Data Assessment'. The form has a sidebar on the left with a progress bar showing steps: 'Is this Project Federally Funded?', 'HMIS 2020 Program Data', 'Basic Client Information', 'Family Members', 'Program Enrollment', 'Henry Ford', 'New Assessment', and 'Placement'. The main area contains fields for 'Assessment Date' (with a calendar icon), 'Age at Assessment' (0), 'Assessment Type' (Entry), 'Assessor' (with a search icon), 'Program' (Fulton County Shelter), and 'Disabling Condition' (SELECT). There is a warning box at the top about 3.917 data.A screenshot of the 'Initiate Intake' form for 'ATL CE-Housing Referral'. The form has a sidebar on the left with a progress bar showing steps: 'Is this Project Federally Funded?', 'HMIS 2020 Program Data', 'Basic Client Information', 'Family Members', 'Program Enrollment', 'Henry Ford', and 'Placement'. The main area contains fields for 'Referral Date and Time' (07/24/2020 AM), 'Expiration Date' (7/27/2020), 'Referral Service' (Housing Placement), 'Referral Status' (Provider Accepted), 'Provider Agency' (SELECT), 'Provider Contact Phone Number', 'Case Manager' (Placed), and 'Comments'. There is a warning box at the top about referral status updates.

5. Return to the client's dashboard and verify that the enrollments are correct and that the offer has been accepted.
6. Return to the Vacancies page and verify that the client has been checked in.

Provider Housing Queue

Facility Name: --SELECT--

2 results found.

Birthdate	Age	Coordinated Project Entry Date	Days Since Last Service	Score Total	Is Chronic Homeless	Latest Cash Income	Veteran Status
01/01/1955	66	01/28/2021	134	17	Yes		No
01/01/1946	75	07/24/2020	322	9	No		No

ATL CE-Housing Referral

When a client to provider match is identified a referral is made. Add New Referral form will provide this functionality. The user can reserve the vacancy and the Referral Status is updated. The Referral Status field will appear in the Housing Queue to assist CE Managers in managing the waitlist to avoid making duplicate referrals. When a referral is made, a notification via email will be sent to the referring Case Manager.

Referral Date and Time: 02/26/2021 10:17 AM

Expiration Date: 3/1/2021 10:17 AM

Referral Service: Housing Placement

Referral Status: \* Offer Accepted

Result Date: --SELECT--

Current Reserved By: Offer Accepted

ATL Accepted Date: Offer Rejected

Referral Result: --SELECT--

Resulting Enrollment: --SELECT--

Provider Agency: Fulton County CoC- HMIS Compliance Only

ToProvider.EntityID: 411057