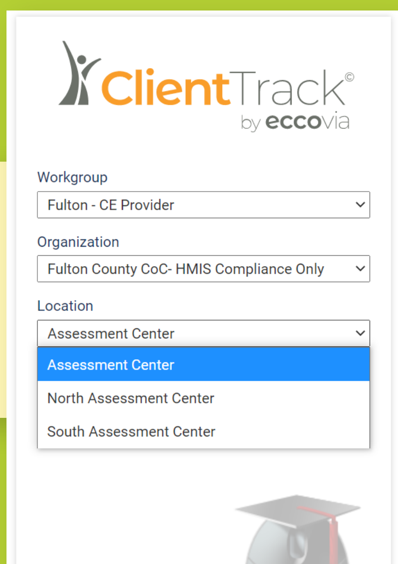
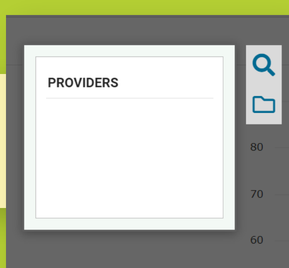
ClientTrack Coordinated Entry Provider Procedures - Fulton County

Sign in and Select the Correct Provider

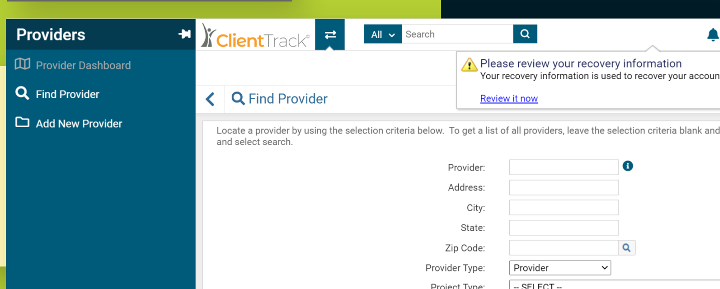
From the ClientTrack Sign In page



1. Sign in using settings...
   a. Workgroup = Fulton CE Provider
   b. Organization = Your Organization
   c. Location = South or North Assessment Center



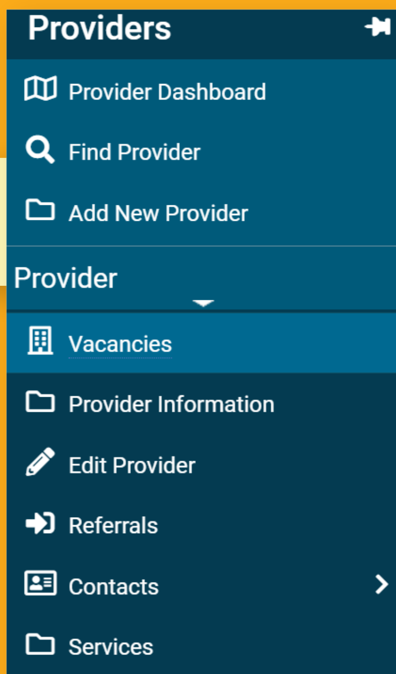
2. Verify or select the desired Provider
   a. Switch to the **Providers** workspace



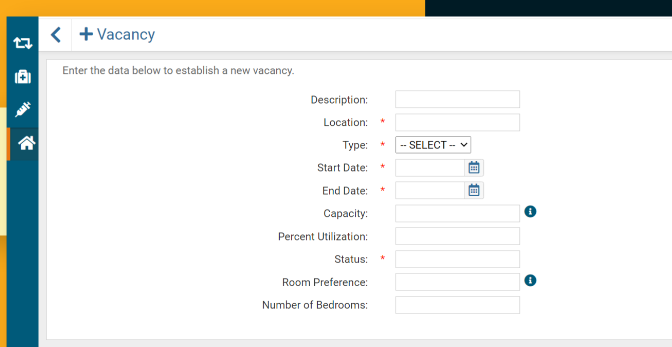
   b. On the Provider's Dashboard
      i. Verify the Provider is correct, OR
      ii. Use the **Find Provider** menu to search and select the correct provider

Create a New Vacancy

In the Provider Workspace



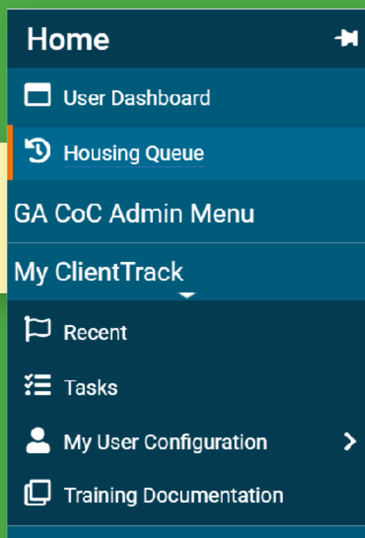
1. Select the **Vacancies** menu
2. Select the + Add New button.



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

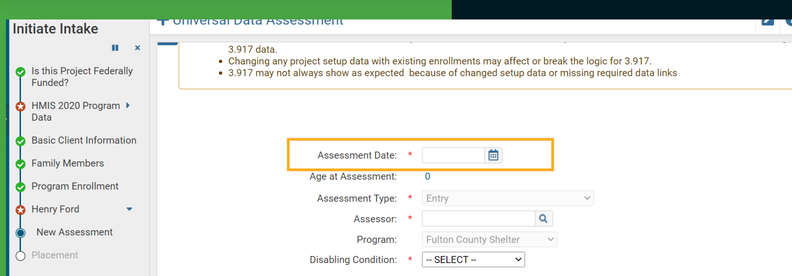
Place a Referred Client in a Vacancy

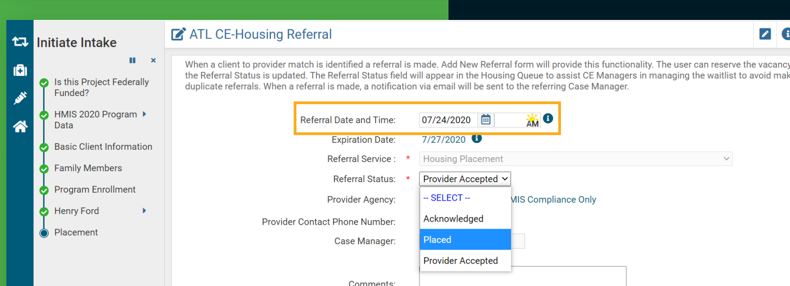
In the Home Workspace



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 Yes, Approve! 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





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.