

Program Outcome Desk Guide

Client Track* Data Entry and Reporting

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

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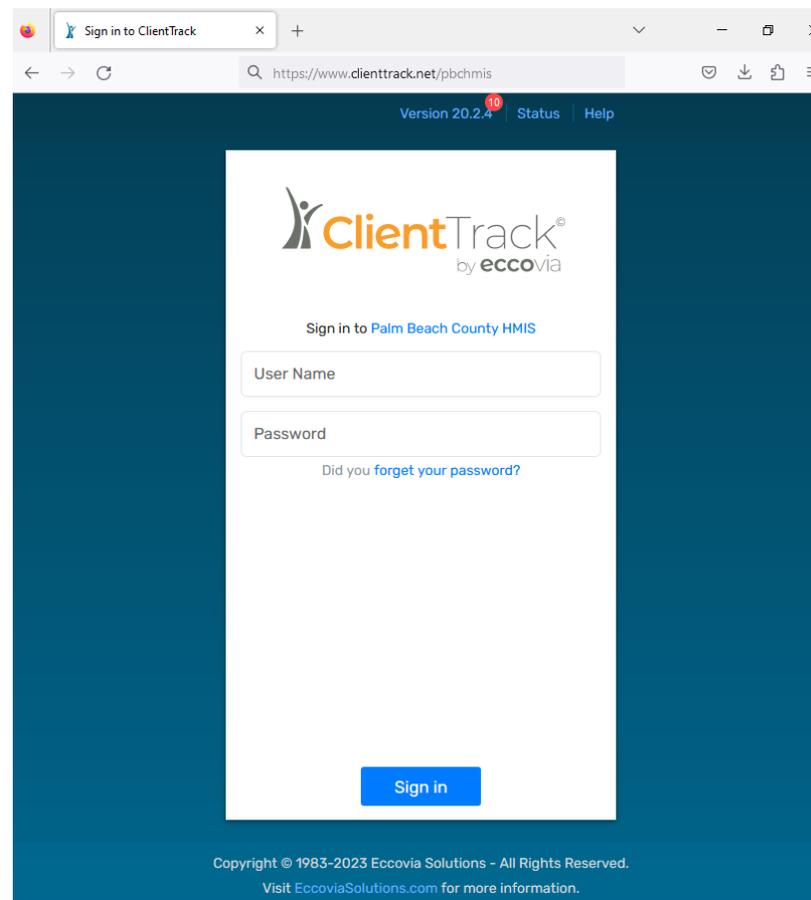
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LOG IN –

- <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

The screenshot displays the ClientTrack interface for a client named Joey Test (ClientID 7565). The left sidebar shows the navigation menu with 'Enrollment and Services' and 'Services' highlighted. The main content area shows the 'Client Services' page with a table of services. The table has columns for Date, Service, Units, \$ Total, and Organization. Two services are listed: 'Follow Up (60 Days)' on 03/14/2023 and 'Housing Needs Assessment' on 01/17/2023. A '+ Add New Service' button is highlighted with a red box.

Client Services

The client's service history displays below. To record a service, click **Add New Service**. To record multiple services, click **Quick Services**. To edit or view an existing service, click **Edit Service** next to the record.

4 results found.

| Date | Service | Units | \$ Total | Organization |
|-----------------------------|--------------------------|-------|----------|--------------|
| ▼ March 2023 (1 Services) | | | | |
| 03/14/2023 | Follow Up (60 Days) | 1.00 | \$0.00 | |
| ▼ January 2023 (1 Services) | | | | |
| 01/17/2023 | Housing Needs Assessment | 1.00 | \$0.00 | |

Cancel

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.

The screenshot shows a web application interface for entering client services. The top navigation bar includes a search icon, a breadcrumb trail (Clients / Client Services / Service), and a user profile icon (SC). The left sidebar contains a navigation menu with options like Dashboard, Find Client, Intake, COVID-19 Intake, COVID-19 Vaccine Intake, Profile, Common Assessments, Other Assessments, Enrollment and Services, Determine Referral Eligibility, Enrollments, Housing Program Eligibility and Availability, Quick Services, Referrals, Services, CE Services, RHY Assessments, and SPDAT Assessments.

The main content area displays the client information for Joey Test (3/4/1988, Male, ClientID 7565) and the "Service" form. The form includes the following fields and options:

- Enrollment:** -- SELECT -- (highlighted with a red box)
- Grant:** FAA - Palm Beach County
- Service:** -- SELECT -- (highlighted with a red box)
- Location:** -- SELECT --
- Date:** 04/20/2023
- Units Of Measure:** Dollars, Minutes, Count, Hours
- Units:** 1.00
- Unit Value:** \$1.00
- Total:** \$1.00
- User Performing the Service:** [Searchable text input]
- Comments:** [Text area]
- Restriction:** Restrict to Organization, Restrict to MOU/InfoRelease

At the bottom right of the form, there is a blue "Save" button (highlighted with a red box) and a "Cancel" button.

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

The screenshot displays the ClientTrack interface for the 'HMIS Active Client List' report. The left sidebar shows the navigation menu with 'BNLs' expanded to 'HMIS Active Client List'. The main content area shows the report title 'HMIS Active Client - By Name List' and the report range '4/1/2023 to 4/30/2023'. The report criteria are listed as 'Report Type: Active at any point' and 'Active Client Filter: Report Glossary Active Client'. The report table has columns for Client ID, Client Name, SSN, Age, Gender, Race, Ethnicity, and Veteran Status. The 'Save' icon in the top toolbar is highlighted with a red box, and the 'Excel Data' option in the dropdown menu is also highlighted with a red box.

| Client ID | Client Name | SSN | Age | Gender | Race | Ethnicity | Veteran Status |
|-----------|-------------|-----|-----|--------|------|-----------|----------------|
|-----------|-------------|-----|-----|--------|------|-----------|----------------|

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’

The screenshot displays the ClientTrack interface for a client named Joey Test (Client ID 7565). The left sidebar shows the navigation menu with 'Enrollments and Services' and 'Self Sufficiency Matrix' highlighted. The main content area shows a list of assessments with a '+ Add New Self-Sufficiency Matrix' button highlighted in a red box.

Client Information: Joey Test, 3/4/1988, Male, Client ID 7565, 561-123-7777

Self-Sufficiency Matrix Assessments

Below is a list of the client's self-sufficiency matrix assessments. To complete a new matrix, click **Add New Self-Sufficiency Matrix**. To edit an existing matrix, click **Edit** next to the record.

No data

+ Add New Self-Sufficiency Matrix View Self-Sufficiency History Chart

No records found.

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

Search

Clients / Self-Sufficiency Matrix Assessments / Self-Sufficiency Matrix

SC

Joey Test
3/4/1988 Male
Client ID 7565
561-123-7777

Self-Sufficiency Matrix

Assessment Date: * 04/20/2023

Assessment Type: * -- SELECT --

Comments:

Income: *

- 1 - No Income
- 2 - Inadequate income and/or spontaneous or inappropriate spending
- 3 - Can meet basic needs with subsidy; appropriate spending
- 4 - Can meet basic needs and manage debt without assistance
- 5 - Income is sufficient, well managed; has discretionary income and is able to save
- 6 - Not Applicable

Employment: *

- 1 - No Job
- 2 - Temporary, part-time or seasonal; inadequate pay; no benefits
- 3 - Employed full-time; inadequate pay; few or no benefits
- 4 - Employed full-time with adequate pay and benefits
- 5 - Maintains permanent employment with adequate income and benefits
- 6 - Not Applicable

And more below; scroll down

Save Cancel

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'

The screenshot shows the 'Data Explorer' interface. The left sidebar has a 'Data Explorer' menu item highlighted with a red box. The main area shows a search for 'FY 2023 SSM' with a 'Search' button. Below the search bar, there is a checkbox for 'Only show my questions'. A table of results is displayed with the following data:

| Name | User | Date Created |
|----------------------|----------------|--------------|
| FY 2023 SSM Outcomes | Stessy Cocerez | 2/9/2023 |

A tooltip 'Copy and edit this question' is visible over the first row of the table. The 'Data Explorer' menu item is also highlighted with a red box.

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

The screenshot shows a web application interface for reporting. On the left is a dark blue sidebar with navigation icons and a search bar. The main content area displays a report titled "FY 2023 SSM Outcomes". Above the table, it says "4 results found." and there is an "Export to Excel" button. The table has the following columns: Created ..., Program, Client ID (with a sort icon), Birth Date, Gender, Race, Ethnicity, Veteran ..., Zip Code, SSM Ass..., Total Sco..., Enroll Da..., and Exit Date. The table body is currently empty. In the bottom left corner, a file icon and the text "Export Data Explor....xlsx" are visible, indicating a download action. In the bottom right corner, there is a "Show all" button.

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'

Enrollment Services Report

Select which report you would like to view.

Sort By: * -- SELECT --

Date Range
Indicate the time period for this report. Only records that fall within the date range you select will be included.

Predefined Date Range: Current Month

Enrollments between: * 01/01/2024 and 01/31/2024

Organization(s)
Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. *Note: The list only shows organizations you are authorized to view.*

Organization(s): *
 Adopt-A-Family of the Palm Beaches, Inc.
 American Association of Caregiving Youth
 Boys Town South Florida
 Center for Child Counseling

Program(s)
Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the icon to select all.

Program(s): Filter by Program(s)

Case Manager(s)
Check the box to limit report results by selected Case Managers. You must be authorized to view the Case Managers by Organization.

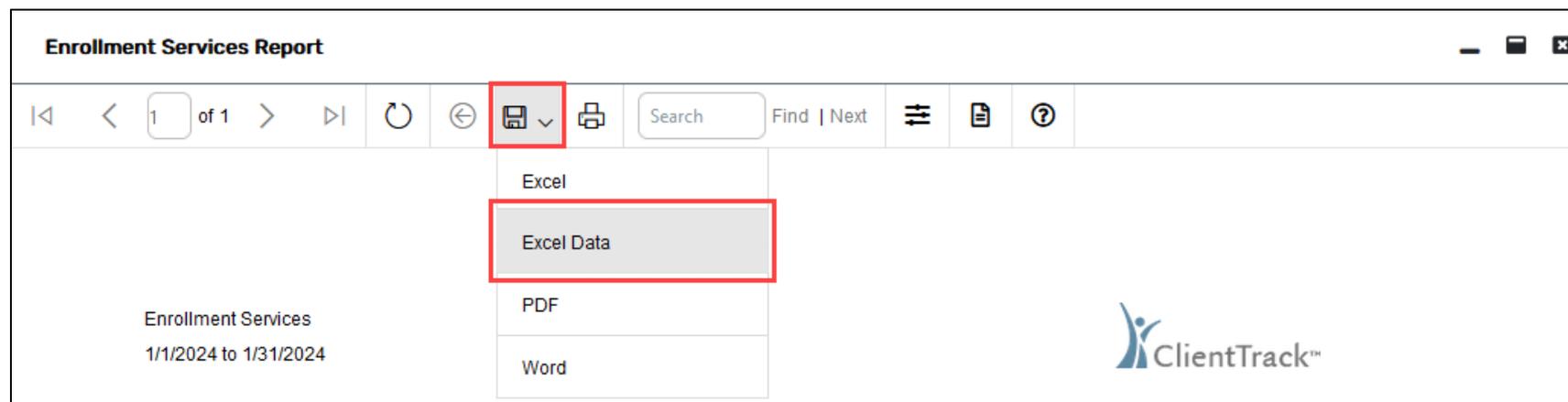
Case Manager(s): Filter by Case Manager(s)

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



The screenshot displays the 'Enrollment Services Report' interface. At the top, the title 'Enrollment Services Report' is visible. Below the title is a toolbar containing various navigation and action icons. The 'Save' icon (a floppy disk) is highlighted with a red box, and its dropdown menu is open, showing options: 'Excel', 'Excel Data' (highlighted with a red box), 'PDF', and 'Word'. The main content area shows 'Enrollment Services' for the period '1/1/2024 to 1/31/2024'. The 'ClientTrack™' logo is located in the bottom right corner.

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'

The screenshot shows the 'Enrollment Services Report' configuration page. The sidebar on the left contains the following navigation items: Files on Server, HMIS Exports, HMIS Reports, Client Reports, Enrollment Reports (expanded), Case Assignment, Clients in Programs, Enrollment Services (selected), Employment At Entry/Exit, Income at Entry/Exit, Enrollment Demographics, Follow Up & Prevention, Enrollment Barrier, Cross Program Participation Report, Referral Reports, and Service Reports.

The main form area is titled 'Enrollment Services Report' and contains the following sections:

- Select which report you would like to view.** (This text is present but the report selection is not visible in the screenshot).
- Sort By:** A dropdown menu with the value '-- SELECT --'.
- Date Range:** A section with the instruction 'Indicate the time period for this report. Only records that fall within the date range you select will be included.' It includes a 'Predefined Date Range:' dropdown set to 'Current Month' and an 'Enrollments between:' field with date pickers for '01/01/2024' and '01/31/2024'.
- Organization(s):** A section with the instruction 'Indicate which organizations should be included in the report by selecting each organization separately, or click the [checkmark] icon to select all. Note: The list only shows organizations you are authorized to view.' It features a list box containing:
 - Adopt-A-Family of the Palm Beaches, Inc.
 - American Association of Caregiving Youth
 - Boys Town South Florida
 - Center for Child Counseling
- Program(s):** A section with the instruction 'Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the [checkmark] icon to select all.' It includes a checkbox labeled 'Filter by Program(s)'.
- Case Manager(s):** A section with the instruction 'Check the box to limit report results by selected Case Managers. You must be authorized to view the Case Managers by Organization.' It includes a checkbox labeled 'Filter by Case Manager(s)'.

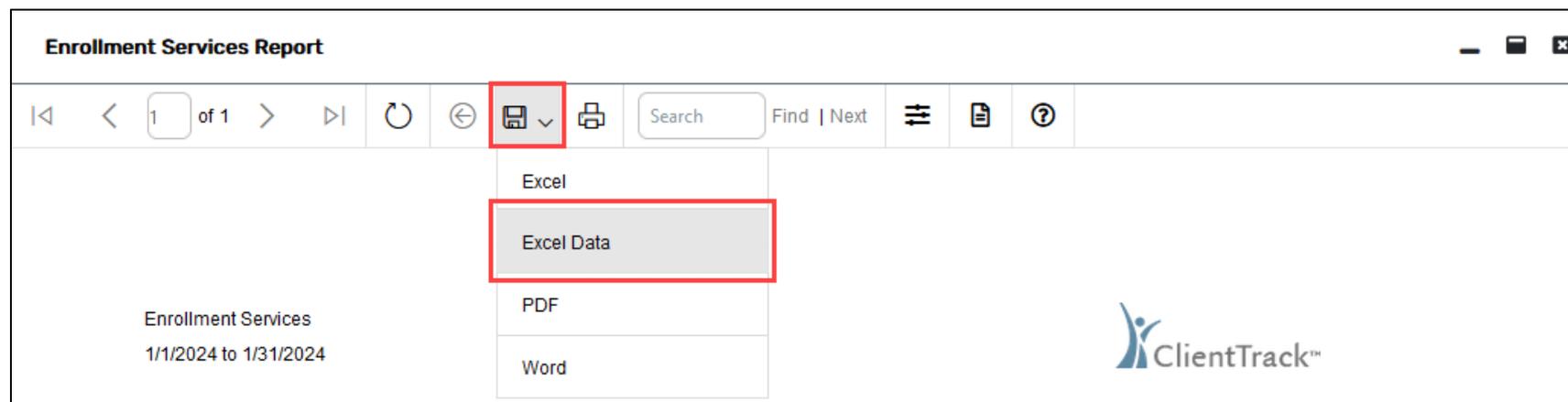
At the bottom right of the form, there are three buttons: 'Report' (highlighted with a red box), 'Schedule Report', and 'Cancel'.

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



The screenshot displays the 'Enrollment Services Report' interface. The title bar reads 'Enrollment Services Report'. Below the title bar is a toolbar with various icons: a left arrow, a right arrow, a page indicator '1 of 1', a refresh icon, a back icon, a save icon (highlighted with a red box), a print icon, a search box containing 'Search', and a 'Find | Next' button. A dropdown menu is open from the save icon, showing four options: 'Excel', 'Excel Data' (highlighted with a red box), 'PDF', and 'Word'. The main content area shows 'Enrollment Services' and the date range '1/1/2024 to 1/31/2024'. The ClientTrack logo is visible in the bottom right corner.

OUTCOME ENTRY & REPORTING: Economic Stability

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'

The screenshot shows the 'Service Summary Report' form in a web application. The left sidebar contains a navigation menu with 'Service Reports' expanded and 'Service Summary' selected. The main form area is titled 'Service Summary Report' and contains the following sections:

- Date Range:** A section with a dropdown for 'Predefined Date Range' set to 'Current Month'. Below it, a red box highlights the 'Service Date Between' field, which is set to '04/01/2023' and '04/30/2023'.
- Organization(s):** A section with a red box highlighting a dropdown menu containing a list of organizations: 'Adopt-A-Family of the Palm Beaches, Inc.', 'American Association of Caregiving Youth', 'Boys Town South Florida', 'Center for Child Counseling', and 'Center for Family Services of PBC, Inc.'.
- Program(s):** A section with a red box highlighting a dropdown menu containing a checked option: 'Filter by Program(s)'.

At the bottom right of the form, there are three buttons: 'Report' (highlighted with a red box), 'Schedule Report', and 'Cancel'.

Example of a Service Summary report

Service Summary
7/1/2024 to 9/30/2024



Report Criteria:

Organizations:



Programs:

First Time Served: N/A

| Service | Service Entries | Units | Total Value | Undu p. Client s | Families | Children in Families | Adults in Families | Seniors in Families | Total Individuals in Families |
|---|--------------------|-------------|----------------|---------------------------|----------|----------------------------|-----------------------|------------------------|--|
| <u>Client Achieved Long-term Goal</u> | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |
| Duplicated Total | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |
| Unduplicated Totals | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |

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.

Intake (2298) Joey Test 3/4/1988 Male Client ID 561-123-7777 7565

Income and Sources, Non-Cash Benefits

Assessment Date: 04/24/2023

Income from Any Source: Yes

Non-Cash Benefits from Any Source: No

Expenses: Client Refused

Did Client Increase or Decrease Income: Data Not Collected

Did Client Maintain Wages for 90 Days or More: -- SELECT --

| Type | Description | Monthly Amount | Restriction |
|-------------------------------------|---|----------------|-----------------------------|
| <input checked="" type="checkbox"/> | Earned Income (i.e., employment income) | \$1,000.00 | Restrict to MOU/InfoRelease |

[Save and Close](#)

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’.

The screenshot displays the Client Track interface for a client named Joey Test. The left sidebar contains a navigation menu with options like Dashboard, Find Client, Intake - Self Sufficiency, COVID-19 Intake, Client Profile, Family & Contacts, Common Assessments, SPDAT Assessments, Enrollments and Services, and RHY Assessments. The main content area shows the client's profile and a table of enrollments. A dropdown menu is open for the enrollment 'P2P - Circles SOFI', highlighting the 'Update/Annual Assessment' option.

Client Information: Joey Test, Male, Client ID 7565, 561-123-7777, 3/4/1988

Enrollments Table:

| Enrollment | Case Members | Enroll Date | Exit Date | Case Manager | Organization | Acuity List Detail? |
|--------------------|--------------|-------------|-----------|--------------|--------------|---------------------|
| P2P - Circles SOFI | 1 | 04/24/2023 | | | | No |
| | 1 | 09/13/2022 | | | | No |
| er (Services Only) | 1 | 06/01/2022 | | | | No |

The dropdown menu for the enrollment includes the following options: Acuity List Detail, Edit Enrollment Workflow, Add Family Member, View Case Members, Update/Annual Assessment (highlighted), Link Assessments, Associated Assessments, Exit the Enrollment, Review Entry Assessments, and Delete Enrollment.

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’

The screenshot displays the ClientTrack interface for a client named Joey Test. The left sidebar shows the navigation menu with 'Enrollments and Services' and 'Self Sufficiency Matrix' highlighted. The main content area shows a list of assessments with a '+ Add New Self-Sufficiency Matrix' button highlighted. The client information at the top includes: Joey Test, 3/4/1988, Male, Client ID 7565, and 561-123-7777. The page title is 'Self-Sufficiency Matrix Assessments'. Below the title, there is a message: 'Below is a list of the client's self-sufficiency matrix assessments. To complete a new matrix, click Add New Self-Sufficiency Matrix. To edit an existing matrix, click Edit next to the record.' The main content area is currently empty, showing 'No data' and 'No records found.' A '+ Add New Self-Sufficiency Matrix' button is highlighted in red.

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

Search

Clients / Self-Sufficiency Matrix Assessments / Self-Sufficiency Matrix

SC

Joey Test
3/4/1988 Male
Client ID 7565
561-123-7777

Self-Sufficiency Matrix

Assessment Date: * 04/20/2023

Assessment Type: * -- SELECT --

Comments:

Income: *

- 1 - No Income
- 2 - Inadequate income and/or spontaneous or inappropriate spending
- 3 - Can meet basic needs with subsidy; appropriate spending
- 4 - Can meet basic needs and manage debt without assistance
- 5 - Income is sufficient, well managed; has discretionary income and is able to save
- 6 - Not Applicable

Employment: *

- 1 - No Job
- 2 - Temporary, part-time or seasonal; inadequate pay; no benefits
- 3 - Employed full-time; inadequate pay; few or no benefits
- 4 - Employed full-time with adequate pay and benefits
- 5 - Maintains permanent employment with adequate income and benefits
- 6 - Not Applicable

And more below; scroll down

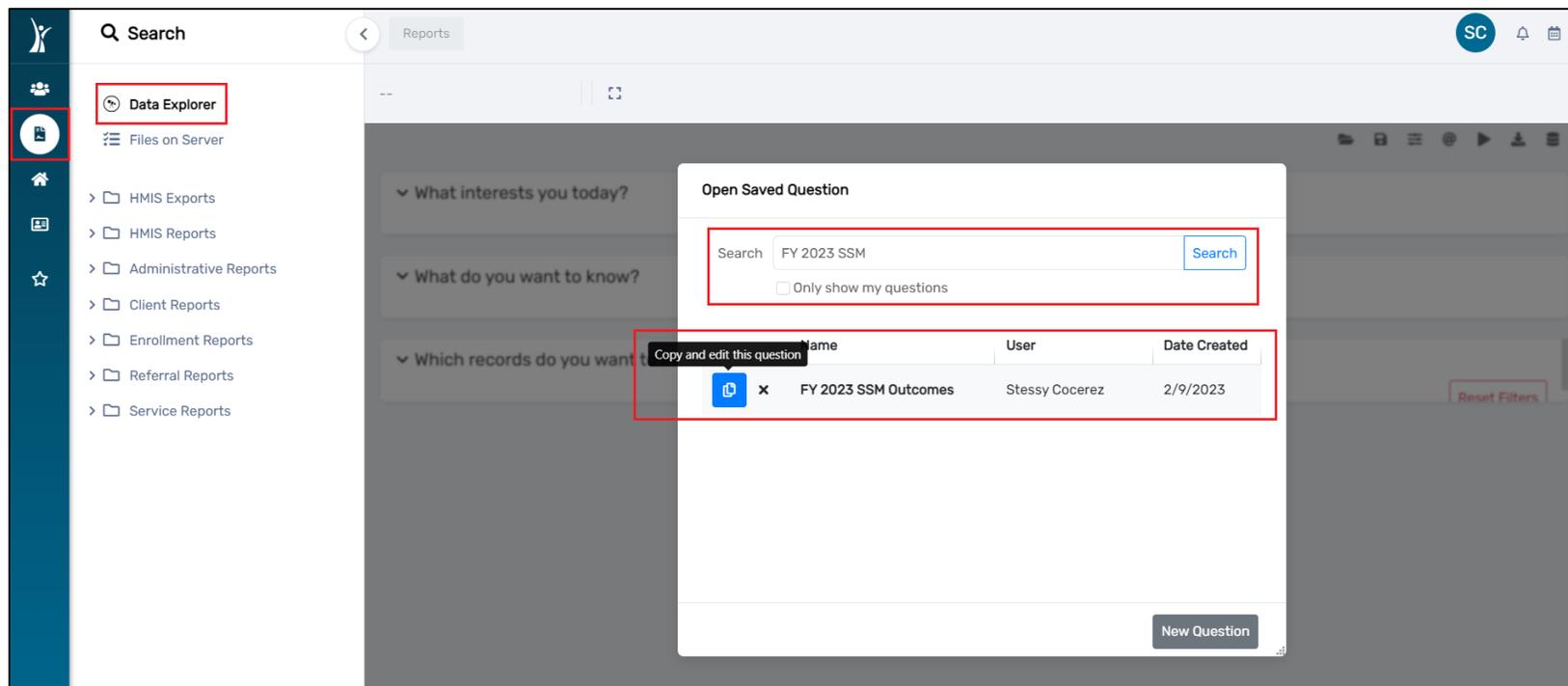
Save Cancel

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'



The screenshot shows the 'Data Explorer' interface. The left sidebar has a 'Data Explorer' button highlighted with a red box. The main area displays a search for 'FY 2023 SSM' with a 'Search' button. Below the search bar, there is a table of results. A tooltip 'Copy and edit this question' is visible over the first row. The table has columns for 'Name', 'User', and 'Date Created'. The first row contains 'FY 2023 SSM Outcomes', 'Stessy Cocerez', and '2/9/2023'. A 'New Question' button is at the bottom right of the table.

| Name | User | Date Created |
|----------------------|----------------|--------------|
| FY 2023 SSM Outcomes | Stessy Cocerez | 2/9/2023 |

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

The screenshot shows a web application interface for reporting. On the left is a dark blue sidebar with a search bar and a list of report categories: Data Explorer, Files on Server, HMIS Exports, HMIS Reports, Administrative Reports, Client Reports, Enrollment Reports, Referral Reports, and Service Reports. The main content area is titled 'FY 2023 SSM Outcomes' and shows '4 results found.' Below this is a table with the following columns: Created ..., Program, Client ID ↑↓, Birth Date, Gender, Race, Ethnicity, Veteran ..., Zip Code, SSM Ass..., Total Sco..., Enroll Da..., and Exit Date. In the top right corner of the report area, there are buttons for 'Visualize', a download icon, and 'Export to Excel', with the latter highlighted by a red box. At the bottom left of the application window, a file download notification for 'Export Data Explor...xlsx' is visible, also highlighted by a red box. The bottom right corner has a 'Show all' button.

OUTCOME ENTRY & REPORTING: Economic Mobility

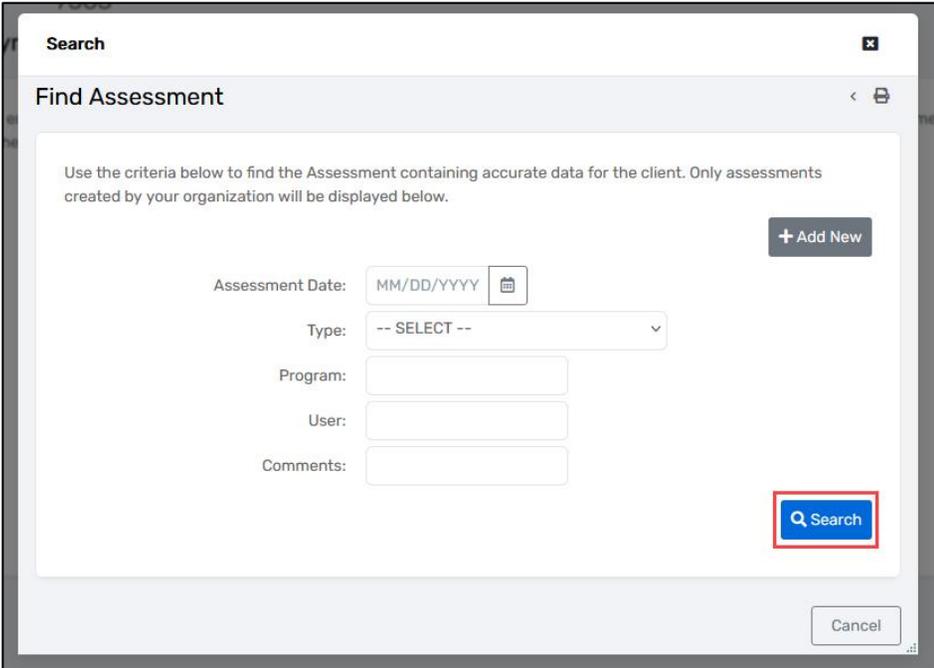
Households obtain employment or better their employment

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

Assessment Date: * 10/05/2023

Assessment Time Frame: * Follow Up

Employed? * Yes

Type of Employment: * -- SELECT --

Did the client improve or maintain their employment? * -- SELECT --

Restriction: -- SELECT --

Organization

InfoRelease

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.*

The screenshot displays the ClientTrack interface for an HMIS 2017 Employment Assessment. The client profile for Joey Test (Male, 3/4/1988, Client ID 7565) is visible at the top. The left sidebar shows the navigation menu with 'Common Assessments' expanded to 'Employment'. The main form area contains the following fields:

- Assessment:** A search box containing the text "No Assessment Selected" with a magnifying glass icon. This box is highlighted with a red border.
- Assessment Date:** A date picker set to 05/23/2023.
- Assessment Time Frame:** A dropdown menu set to "Exit".
- Employed?:** A dropdown menu set to "Data Not Collected".
- Restriction:** Radio buttons for "Restrict to Organization" (unselected) and "Restrict to MDU/InfoRelease" (selected).

At the bottom right of the form, there are "Save" and "Cancel" buttons.

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.

Search

Find Assessment

Search

13 results found.

| Assessment Date | Type | Program | User | Comments | Grant Program Components |
|-----------------|----------------------------------|--------------------|---------------|----------|--------------------------|
| 05/23/2023 | Exit | P2P - Circles SOFI | David Tedesco | | |
| 05/23/2023 | During Program Enrollment/Update | P2P - Circles SOFI | David Tedesco | | |
| 05/23/2023 | Entry | P2P - Circles SOFI | David Tedesco | | |

Cancel

Clients / Employment Assessments / HMIS 2017 Employment Assessment

AC

Joey Test
3/4/1988 Male Client ID 561-123-7777
7565 --

HMIS 2017 Employment Assessment

Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week prior to assessment, and select the tenure of the employment position. If the client is not employed, indicate if the client is looking for work.

Assessment:

| Date | Program | Type | User |
|-----------|--------------------|----------------------------------|---------------|
| 5/23/2023 | P2P - Circles SOFI | During Program Enrollment/Update | David Tedesco |

Assessment Date: 05/23/2023

Assessment Time Frame: Exit

Employed?: Data Not Collected

Restriction: Restrict to Organization Restrict to MOU/InfoRelease

Save Cancel

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'

The screenshot shows the Data Explorer interface. On the left, the 'Data Explorer' menu item is highlighted with a red box. The main area displays a search for 'FY 2023 Employment' with a 'Search' button. Below the search bar, there is a checkbox for 'Only show my questions' which is unchecked. A table of saved questions is shown below, with the first row highlighted in red. The table has columns for 'Name', 'User', and 'Date Created'. The first row contains the text 'FY 2023 Employment Assessments', 'Stessy Cocerez', and '3/28/2023'. A 'Copy and edit this question' tooltip is visible over the first row. A 'New Question' button is located at the bottom right of the table.

| Name | User | Date Created |
|--------------------------------|----------------|--------------|
| FY 2023 Employment Assessments | Stessy Cocerez | 3/28/2023 |

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

The screenshot displays a web-based data reporting interface. On the left is a navigation sidebar with a search bar and a list of report categories: Data Explorer, Files on Server, HMIS Exports, HMIS Reports, Administrative Reports, Client Reports, Enrollment Reports, Referral Reports, and Service Reports. The main content area is titled 'FY 2023 Employment Assessments' and features a table with the following columns: Created, Program, Case ID, Client ID, Enroll Da..., Exit Date, Assessm..., Assessm..., Assessm..., Assessm..., ClientID, Did the cl..., Employe..., and How did t... The table is currently empty. In the top right corner of the table area, there is a 'Visualize' button and a download icon (a square with a downward arrow) which is highlighted with a red box and labeled 'Export to Excel'. At the bottom left of the interface, a taskbar shows a file named 'Export Data Explor...xlsx' with a red box around it. At the bottom right, there is a 'Show all' button.

OUTCOME ENTRY & REPORTING: Economic Mobility

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'

The screenshot shows the 'Service Summary Report' form in a web application. The left sidebar contains a navigation menu with 'Service Reports' expanded and 'Service Summary' selected. The main form area is titled 'Service Summary Report' and contains the following sections:

- Date Range:** A section with the instruction 'Indicate the time period for this report. Only records that fall within the date range you select will be included.' It features a 'Predefined Date Range' dropdown set to 'Current Month' and a 'Service Date Between' field with date pickers for '04/01/2023' and '04/30/2023'.
- Organization(s):** A section with the instruction 'Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. Note: The list only shows organizations you are authorized to view.' It includes a list of organizations: 'Adopt-A-Family of the Palm Beaches, Inc.', 'American Association of Caregiving Youth', 'Boys Town South Florida', 'Center for Child Counseling', and 'Center for Family Services of PBC, Inc.'.
- Program(s):** A section with the instruction 'Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the icon to select all.' It includes a 'Program(s):' field with a checked 'Filter by Program(s)' checkbox.

At the bottom right of the form, there are three buttons: 'Report', 'Schedule Report', and 'Cancel'.

Example of a Service Summary report

Service Summary
7/1/2024 to 9/30/2024



Report Criteria:

Organizations:

Programs:

First Time Served: N/A

| Service | Service Entries | Units | Total Value | Undup. Clients | Families | Children in Families | Adults in Families | Seniors in Families | Total Individuals in Families |
|---------------------------------------|--------------------|-------------|----------------|-------------------|----------|----------------------------|-----------------------|------------------------|--|
| <u>Client Achieved Long-term Goal</u> | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |
| Duplicated Total | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |
| Unduplicated Totals | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |

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'

The screenshot displays the ClientTrack interface for a client named Joey Test. The client's profile information is visible at the top, including their name, date of birth (3/4/1988), gender (Male), and Client ID (7565). Below this, the 'Enrollments' section shows a table with 8 results found. The table columns are Enrollment, Case Members, Enroll Date, Exit Date, Case Manager, Organization, and Acuity List Detail. The 'P2P - Circles SOFI' enrollment is highlighted, and its dropdown menu is open, showing various actions. The 'Exit the Enrollment' option is selected and highlighted in blue.

| Enrollment | Case Members | Enroll Date | Exit Date | Case Manager | Organization | Acuity List Detail? |
|--------------------|--------------|-------------|-----------|--------------|--------------|---------------------|
| P2P - Circles SOFI | 1 | 04/24/2023 | | | | No |
| | 1 | 09/13/2022 | | | | No |
| | 1 | 06/01/2022 | | | | No |

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

The screenshot shows a web application interface for managing client data. The main content area displays the 'HUD Program Exit' form for 'Enrollment Exit'. The client's name is 'Joey Test', born '3/4/1988', male, with 'Client ID 7565'. The form includes fields for 'Exit Date' (04/24/2023), 'Destination' (Staying or living with family, permanent tenure), and 'Exit Reason' (Completed Program). There are also checkboxes for 'Case Manager Assignment' and 'End Case Assignment'. A 'Save' button is located at the bottom right of the form.

HUD Program Exit

Enrollment Exit

To exit the client from the Enrollment, enter the **Exit Date** and **Destination**.

Exit Date: 04/24/2023

Destination: Staying or living with family, permanent tenure

Exit Reason: Completed Program

Case Manager Assignment:

End Case Assignment:

Save

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'

The screenshot displays the ClientTrack interface for the 'HMIS Active Client List' report. The left sidebar shows the navigation menu with 'BNLs' expanded and 'HMIS Active Client List' selected. The main content area shows the report title 'HMIS Active Client - By Name List' and the report range '4/1/2023 to 4/30/2023'. The report criteria are listed as follows:

- Report Type: Active at any point
- Active Client Filter: Report Glossary Active Client
- Organizations:
- Programs:

The report table has the following columns: Client ID, Client Name, SSN, Age, Gender, Race, Ethnicity, and Veteran Status. The 'Excel Data' option is highlighted in the export dropdown menu.

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

The screenshot shows a web application interface for managing client data. The top navigation bar includes a search icon, a breadcrumb trail 'Clients / Joey Test's Dashboard', and user initials 'SC'. The main content area is titled 'HUD Program Exit' and features a client profile for 'Joey Test' (Male, 3/4/1988, Client ID 7565). The 'Enrollment Exit' section is active, displaying a form with the following fields:

- Exit Date:** 04/24/2023 (with a calendar icon)
- Destination:** Staying or living with family, permanent tenure (dropdown menu)
- Exit Reason:** Completed Program (dropdown menu)
- Case Manager Assignment:** (with an information icon)
- End Case Assignment:** (checked checkbox with an information icon)

Below the form is a blue 'Save' button. The left sidebar contains a navigation menu with options like Dashboard, Find Client, Intake - Self Sufficiency, COVID-19 Intake, Client Profile, Family & Contacts, Common Assessments (Domestic Violence, Barriers, Master Assessments, Employment, Education - Adult, Education - Child), and Financial.

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)

The screenshot displays the 'HMIS 2022 System Performance Measures Report' configuration interface. On the left sidebar, the 'HMIS Reports' folder is expanded, and 'System Performance Measures (2022)' is selected. The main panel shows the following configuration:

- Measure to Run:** Performance Measure 2
- Date Range:** Indicate the time period for this report. Only records that fall within the date range you select will be included.
 - Predefined Date Range: -- SELECT --
 - Service Date Between: 10/01/2024 and 09/30/2025
- Organization(s):** Filter by Organization(s)

At the bottom right, the 'Report' button is highlighted with a red box, along with 'Schedule Report' and 'Cancel' buttons.

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

HMIS 2022 System Performance Measures Report

HMIS System Performance Measures 2022: Measure 2
10/1/2024 to 9/30/2025

Report Criteria:

The following criteria have been utilized to filter the data used for comparison data.

Organizations:
Programs:
CoC: No Filtering on CoC

Measure 2a and 2b: The Extent to which Persons who Exit Homelessness to Permanent Housing Destinations Return to Homelessness within 6 to 12 months (and 24 months in a separate calculation)

| | Total Number of Persons who Exited to a Permanent Housing Destination (2 Years Prior) | Number Returning to Homelessness in Less than 6 Months (0 - 180 days) | Percentage of Returns in Less than 6 Months (0 - 180 days) | Number Returning to Homelessness from 6 to 12 Months (181 - 365 days) | Percentage of Returns from 6 to 12 Months (181 - 365 days) | Number Returning to Homelessness from 13 to 24 Months (366 - 730 days) | Percentage of Returns from 13 to 24 Months (366 - 730 days) | Number of Returns in 2 Years | Percentage of Returns in 2 Years |
|--------------------------------------|---|---|--|---|--|--|---|------------------------------|----------------------------------|
| Exit was from PH | 7 | 0 | 0.00% | 0 | 0.00% | 0 | 0.00% | 0 | 0.00% |
| TOTAL Returns to Homelessness | 7 | 0 | 0.00% | 0 | 0.00% | 0 | 0.00% | 0 | 0.00% |

ClientTrack™ Reports Page 1 of 1
Stessy Cocerez 4/25/2023 2:22 PM
Organization(s): Filter by Organization(s)

Report Schedule Report Cancel

| | ExitToPH_EnrollID | ExitToPH_CaseID | ExitToPH_EnrollDate | ExitToPH_ExitDate | ExitToPH_Destination | ProgramTypeGroup | GroupOrder | ReturnedUnder6Months | Returned6to12Months | Returned13to24Months | Inherited |
|---|-------------------|-----------------|---------------------|-------------------|---|------------------|------------|----------------------|---------------------|----------------------|-----------|
| 1 | | | 10/22/2019 | 3/7/2023 | Staying or living with family, permanent tenure | Exit was from PH | 50 | 0 | 0 | 0 | |
| 2 | | | 10/22/2019 | 3/7/2023 | Staying or living with family, permanent tenure | Exit was from PH | 50 | 0 | 0 | 0 | |
| 3 | | | 10/22/2019 | 3/7/2023 | Staying or living with family, permanent tenure | Exit was from PH | 50 | 0 | 0 | 0 | |
| 4 | | | 10/22/2019 | 3/7/2023 | Staying or living with family, permanent tenure | Exit was from PH | 50 | 0 | 0 | 0 | |
| 5 | | | 11/15/2019 | 10/23/2022 | Rental by client, no ongoing housing subsidy | Exit was from PH | 50 | 0 | 0 | 0 | |
| 6 | | | 11/15/2019 | 10/27/2022 | Rental by client, no ongoing housing subsidy | Exit was from PH | 50 | 0 | 0 | 0 | |
| 7 | | | 11/15/2019 | 10/27/2022 | Rental by client, no ongoing housing subsidy | Exit was from PH | 50 | 0 | 0 | 0 | |
| 8 | | | 11/15/2019 | 10/27/2022 | Rental by client, no ongoing housing subsidy | Exit was from PH | 50 | 0 | 0 | 0 | |

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'

The screenshot displays the ClientTrack interface for a client named Joey Test. The client's profile information is shown at the top, including their name, date of birth (3/4/1988), gender (Male), and Client ID (7565). Below this, the 'Enrollments' section is visible, showing a table with 8 results found. The table columns are Enrollment, Case Members, Enroll Date, Exit Date, Case Manager, Organization, and Acuity List Detail. The first enrollment is 'P2P - Circles SOFI' with 1 member, enrolled on 04/24/2023. A dropdown menu is open for this enrollment, showing various actions, with 'Exit the Enrollment' highlighted in blue. Other actions include 'Acuity List Detail', 'Edit Enrollment Workflow', 'Add Family Member', 'View Case Members', 'Update/Annual Assessment', 'Link Assessments', 'Associated Assessments', 'Review Entry Assessments', and 'Delete Enrollment'.

| Enrollment | Case Members | Enroll Date | Exit Date | Case Manager | Organization | Acuity List Detail? |
|--------------------|--------------|-------------|-----------|--------------|--------------|---------------------|
| P2P - Circles SOFI | 1 | 04/24/2023 | | | | No |
| | 1 | 09/13/2022 | | | | No |
| | 1 | 06/01/2022 | | | | No |

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

The screenshot shows a web application interface for managing client enrollment exits. The top navigation bar includes a search icon, a breadcrumb trail 'Clients / Joey Test's Dashboard', and user initials 'SC'. The main content area is titled 'HUD Program Exit' and 'Enrollment Exit'. It displays client information: Joey Test, 3/4/1988, Male, Client ID 7565, and 561-123-7777. The form includes fields for 'Exit Date' (04/24/2023), 'Destination' (Staying or living with family, permanent tenure), and 'Exit Reason' (Completed Program). There are also checkboxes for 'Case Manager Assignment' and 'End Case Assignment'. A 'Save' button is located at the bottom right.

HUD Program Exit

Enrollment Exit

To exit the client from the Enrollment, enter the **Exit Date** and **Destination**.

Exit Date: 04/24/2023

Destination: Staying or living with family, permanent tenure

Exit Reason: Completed Program

Case Manager Assignment:

End Case Assignment:

Save

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

The screenshot displays the ClientTrack interface for the 'HMIS Active Client List' report. The left sidebar shows a navigation menu with 'BNLs' expanded, and 'HMIS Active Client List' selected. The main content area shows the report title 'HMIS Active Client - By Name List' and the report range '4/1/2023 to 4/30/2023'. The report criteria are listed as 'Report Type: Active at any point' and 'Active Client Filter: Report Glossary Active Client'. The report table has columns for Client ID, Client Name, SSN, Age, Gender, Race, Ethnicity, and Veteran Status. The 'Save' icon in the top toolbar is highlighted with a red box, and a dropdown menu is open, with 'Excel Data' selected and highlighted by another red box.

| Client ID | Client Name | SSN | Age | Gender | Race | Ethnicity | Veteran Status |
|-----------|-------------|-----|-----|--------|------|-----------|----------------|
|-----------|-------------|-----|-----|--------|------|-----------|----------------|

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’

The screenshot displays the ClientTrack interface for a client named Joey Test. The client's profile information includes: Name: Joey Test, Gender: Male, Client ID: 7565, Date of Birth: 3/4/1988, Ethnicity: Hispanic/Latin(a)(o)(x), and Race: Black, African American, or African. The main section shows 'Joey's Enrollments' with a table of enrollment records. The table has columns for Enrollment, Case Members, Enroll Date, Exit Date, Case Manager, Organization, and Acuity List Detail. The first enrollment is 'P2P - Circles SOFI' with 1 member, enrolled on 04/24/2023. An action dropdown menu is open for this enrollment, showing options: Acuity List Detail, Edit Enrollment Workflow, Add Family Member, View Case Members, Update/Annual Assessment, Link Assessments, Associated Assessments, and Exit the Enrollment. The 'Exit the Enrollment' option is highlighted in blue.

| Enrollment | Case Members | Enroll Date | Exit Date | Case Manager | Organization | Acuity List Detail? |
|--------------------|--------------|-------------|-----------|--------------|--------------|---------------------|
| P2P - Circles SOFI | 1 | 04/24/2023 | | | | No |
| | 1 | 09/13/2022 | | | | No |
| er (Services Only) | 1 | 06/01/2022 | | | | No |

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

The screenshot displays a web application interface for managing client information. The top navigation bar includes a search function and the breadcrumb "Clients / Joey Test's Dashboard". The main header identifies the client as "HUD Program Exit" for "Joey Test" (Male, Client ID 7565, 561-123-7777). The "Enrollment Exit" section is active, showing the following details:

- Exit Date:** 04/24/2023
- Destination:** Staying or living with family, permanent tenure
- Exit Reason:** Completed Program
- Case Manager Assignment:** Stessy Cocerez
- End Case Assignment:**

A "Save" button is located at the bottom right of the form.

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'

The screenshot displays the ClientTrack interface for the 'HMIS Active Client List' report. The left sidebar shows the navigation menu with 'BNLs' expanded and 'HMIS Active Client List' selected. The main content area shows the report title 'HMIS Active Client - By Name List' and the report range '4/1/2023 to 4/30/2023'. The report criteria are listed as follows:

- Report Type: Active at any point
- Active Client Filter: Report Glossary Active Client
- Organizations:
- Programs:

The report table has the following columns: Client ID, Client Name, SSN, Age, Gender, Race, Ethnicity, and Veteran Status. The 'Save' icon in the top toolbar is highlighted with a red box, and the 'Excel Data' option in the dropdown menu is also highlighted with a red box.

OUTCOME ENTRY & REPORTING: Homelessness

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'

The screenshot displays the 'Service Summary Report' configuration page. On the left is a navigation sidebar with a tree view containing 'Service Reports' (expanded) and 'Service Summary' (selected). The main content area is titled 'Service Summary Report' and includes the following sections:

- Date Range:** A section with a dropdown for 'Predefined Date Range' set to 'Current Month' and a date range selector showing 'Service Date Between: 04/01/2023 and 04/30/2023'.
- Organization(s):** A section with a list of organizations including 'Adopt-A-Family of the Palm Beaches, Inc.', 'American Association of Caregiving Youth', 'Boys Town South Florida', and 'Center for Child Counseling'.
- Program(s):** A section with a checkbox for 'Filter by Program(s)' which is checked.

At the bottom right, there are three buttons: 'Report' (highlighted in red), 'Schedule Report', and 'Cancel'.

Example of a Service Summary report

Service Summary
7/1/2024 to 9/30/2024

Report Criteria:
Organizations:
Programs:
First Time Served: N/A



| Service | Service Entries | Units | Total Value | Undup. Clients | Families | Children in Families | Adults in Families | Seniors in Families | Total Individuals in Families |
|---------------------------------------|--------------------|-------------|----------------|-------------------|----------|----------------------------|-----------------------|------------------------|--|
| <u>Client Achieved Long-term Goal</u> | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |
| Duplicated Total | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |
| Unduplicated Totals | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |

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”

The screenshot displays the ClientTrack interface for a client named Joey Test. The left sidebar contains a navigation menu with 'Common Assessments' and 'Behavioral Health' highlighted with red boxes. The main content area shows the client's dashboard with the following information:

Joey Test's Information

| | | | | | |
|------------|-------------------------|-------------|-------------------------------------|------|----|
| Name: | Test, Joey | Birth Date: | 3/4/1988 | Age: | 35 |
| Gender: | Male | Veteran: | No | | |
| Ethnicity: | Hispanic/Latin(a)(o)(x) | Race: | Black, African American, or African | | |

Joey's Enrollments

8 results found.

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.

The screenshot shows a web application interface for entering a Behavioral Health Assessment. The top navigation bar includes a search bar, a breadcrumb trail (Clients / BHA Overview / Behavioral Health), and user information (SC). The main content area displays the client profile for Joey Test (Male, 3/4/1988, Client ID 7565, 561-123-7777). The Behavioral Health assessment form is highlighted with a red border and contains the following fields:

- Program: * -- SELECT --
- Assessment Date: * MM/DD/YYYY
- Assessment Type: * -- SELECT --
- Baseline Or Followup: * -- SELECT --
- Score: *
- Total Change :

At the bottom right of the form, there are two buttons: "Save" (highlighted with a red border) and "Cancel".

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.

The screenshot displays the 'Data Explorer' interface. On the left, a sidebar lists report categories: Files on Server, HMIS Exports, HMIS Reports, Administrative Reports, Client Reports, Enrollment Reports, Referral Reports, and Service Reports. The main content area is titled 'BH Assessments and Client Demos' and contains three filter sections:

- What interests you today?**: Includes dropdown filters for Enrollment, Client, Behavioral Health, and Client Assessment.
- What do you want to know?**: A grid of field filters including Created by Organization, Program, Grant, Case ID, Client ID, Enroll Date, Exit Date, Destination at Exit, Still Enrolled, Full Name, Birth Date, Gender, Race, Ethnicity, Veteran Status, Zip Code, Assessment, Assessment Date, Baseline or Follow Up, Score, Total Change, and Living Situation.
- Which records do you want to include?**: A filter builder with three conditions:
 - and Program = Program Name
 - and Assessment Date >= '10/01/2022'
 - and Assessment Date <= '09/30/2023'

Buttons for 'Start Over', 'Reset Filters', and 'Show Me' are visible at the bottom of the interface.

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

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

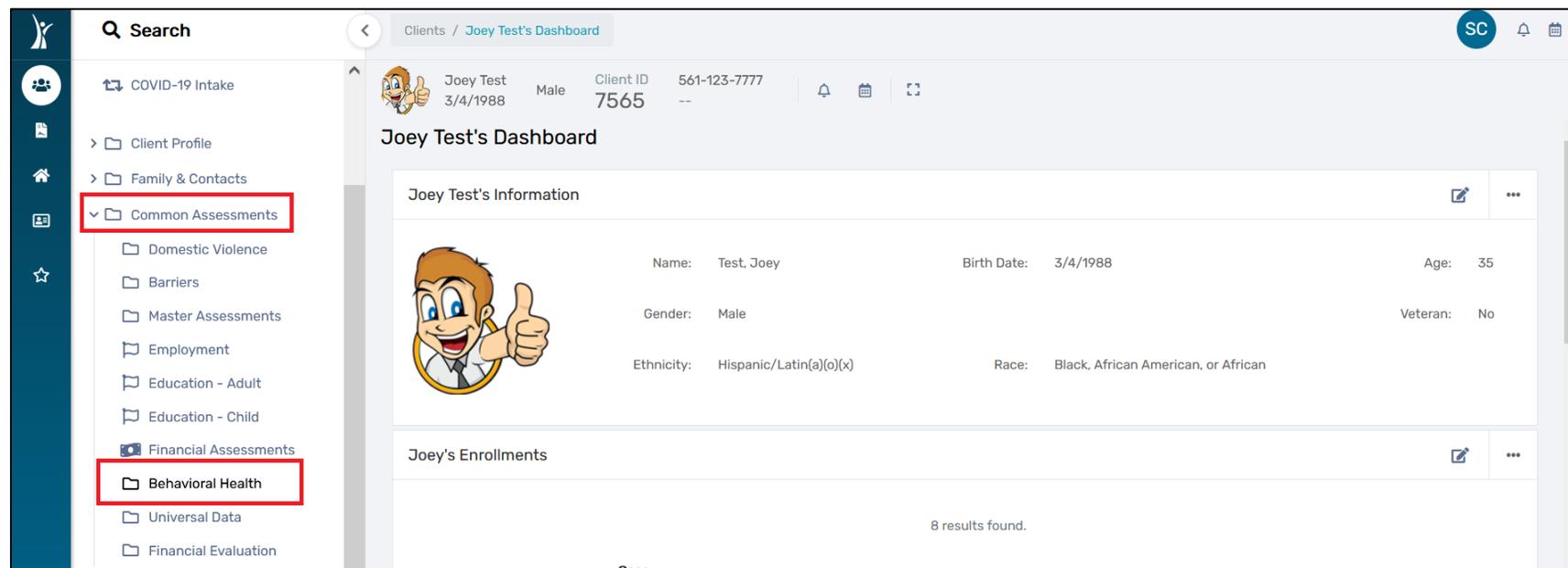
OUTCOME ENTRY & REPORTING: Behavioral Health

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”



The screenshot displays the ClientTrack interface for a client named Joey Test. The left sidebar contains a navigation menu with 'Common Assessments' and 'Behavioral Health' highlighted in red. The main content area shows 'Joey Test's Dashboard' with the following information:

| Joey Test's Information | | | |
|-------------------------|-------------------------------------|-------------|-------------------------|
| Name: | Test, Joey | Birth Date: | 3/4/1988 |
| Age: | 35 | Gender: | Male |
| Veteran: | No | Ethnicity: | Hispanic/Latin(a)(o)(x) |
| Race: | Black, African American, or African | | |

Below the information section is 'Joey's Enrollments' with 8 results found.

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.

The screenshot displays a web application interface for Behavioral Health assessment entry. The interface includes a search bar, a navigation menu, and a client profile section. The client profile for Joey Test (3/4/1988, Male, Client ID 7565) is visible. The main content area shows the Behavioral Health assessment form, which is highlighted with a red box. The form fields are:

- Program: * -- SELECT --
- Assessment Date: * MM/DD/YYYY
- Assessment Type: * -- SELECT --
- Baseline Or Followup: * -- SELECT --
- Score: *
- Total Change :

The Save button is highlighted with a red box at the bottom right of the form.

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.

The screenshot displays the 'Data Explorer' interface. On the left, a sidebar lists report categories: Files on Server, HMIS Exports, HMIS Reports, Administrative Reports, Client Reports, Enrollment Reports, Referral Reports, and Service Reports. The main content area is titled 'BH Assessments and Client Demos' and contains three filter sections:

- What interests you today?**: Includes dropdowns for Enrollment, Client, Behavioral Health, and Client Assessment.
- What do you want to know?**: A grid of field filters including Created by Organization, Program, Grant, Case ID, Client ID, Enroll Date, Exit Date, Destination at Exit, Still Enrolled, Full Name, Birth Date, Gender, Race, Ethnicity, Veteran Status, Zip Code, Assessment, Assessment Date, Baseline or Follow Up, Score, Total Change, and Living Situation.
- Which records do you want to include?**: A filter builder with three conditions:
 - and Program = Program Name
 - and Assessment Date >= '10/01/2022'
 - and Assessment Date <= '09/30/2023'

Buttons for 'Start Over', 'Reset Filters', and 'Show Me' are visible at the bottom of the interface.

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 |
|----|-------------|------------|---------------------|----------------|------------|-----------------|-----------------------|-------|--------------|--------------------|---|
| | 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'

Service Summary Report

Date Range
Indicate the time period for this report. Only records that fall within the date range you select will be included.

Predefined Date Range: Current Month

Service Date Between: 04/01/2023 and 04/30/2023

Organization(s)
Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. *Note: The list only shows organizations you are authorized to view.*

Organization(s): Adopt-A-Family of the Palm Beaches, Inc.
American Association of Caregiving Youth
Boys Town South Florida
Center for Child Counseling
Center for Family Services of BPC, Inc.

Program(s)
Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the icon to select all.

Program(s): Filter by Program(s)

Report Schedule Report Cancel

Example of a Service Summary report

Service Summary
7/1/2024 to 9/30/2024



Report Criteria:

Organizations:

Programs:

First Time Served: N/A

| Service | Service Entries | Units | Total Value | Undup. Clients | Families | Children in Families | Adults in Families | Seniors in Families | Total Individuals in Families |
|---------------------------------------|-----------------|-------------|---------------|----------------|----------|----------------------|--------------------|---------------------|-------------------------------|
| <u>Client Achieved Long-term Goal</u> | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |
| Duplicated Total | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |
| Unduplicated Totals | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |

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

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’

The screenshot displays the ClientTrack interface for a client named Joey Test. The client's profile information includes: Name: Joey Test, Date of Birth: 3/4/1988, Gender: Male, Client ID: 7565, Phone: 561-123-7777, Ethnicity: Hispanic/Latin(x)(o)(x), and Race: Black, African American, or African. The 'Joey's Enrollments' section shows a table with the following data:

| Enrollment | Case Members | Enroll Date | Exit Date | Case Manager | Organization | Acuity List Detail? |
|--------------------|--------------|-------------|-----------|----------------------|------------------------------|---------------------|
| Current | | | | | | |
| P2P - Circles SOFI | 1 | 04/24/2023 | | Stessy Cocerez | Pathways to Prosperity | No |
| Acuity List Detail | 1 | 09/13/2022 | | Randy Paul | Palm Beach County BCC - Lead | No |
| er (Services Only) | 1 | 06/01/2022 | | Keianna Pierre Louis | Palm Beach County BCC - Lead | No |

A dropdown menu is open for the 'P2P - Circles SOFI' enrollment, showing the following options: Acuity List Detail, Edit Enrollment Workflow, Add Family Member, View Case Members, Update/Annual Assessment, Link Assessments, Associated Assessments, and Exit the Enrollment. The 'Exit the Enrollment' option is highlighted in blue.

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

The screenshot displays a web application interface for managing client information. The main content area is titled "HUD Program Exit" and "Enrollment Exit" for client Joey Test (Client ID 7565). The form includes the following fields and options:

- Exit Date:** 04/24/2023 (with a calendar icon)
- Destination:** Staying or living with family, permanent tenure (dropdown menu)
- Exit Reason:** Completed Program (dropdown menu)
- Case Manager Assignment:** Stessy Cocerez (with an information icon)
- End Case Assignment:** (with an information icon)

At the bottom right of the form, there is a blue "Save" button. The left sidebar contains navigation options such as Dashboard, Find Client, Intake - Self Sufficiency, COVID-19 Intake, Client Profile, Family & Contacts, Common Assessments, Domestic Violence, Barriers, Master Assessments, Employment, Education - Adult, and Education - Child.

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'

Service Summary Report

Date Range
Indicate the time period for this report. Only records that fall within the date range you select will be included.

Predefined Date Range: Current Month

Service Date Between: 04/01/2023 and 04/30/2023

Organization(s)
Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. *Note: The list only shows organizations you are authorized to view.*

Organization(s):
 Adopt-A-Family of the Palm Beaches, Inc.
 American Association of Caregiving Youth
 Boys Town South Florida
 Center for Child Counseling
 Center for Family Services of PBC, Inc.

Program(s)
Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the icon to select all.

Program(s): Filter by Program(s)

Report Schedule Report Cancel

Example of a Service Summary report

Service Summary
7/1/2024 to 9/30/2024



Report Criteria:

Organizations:

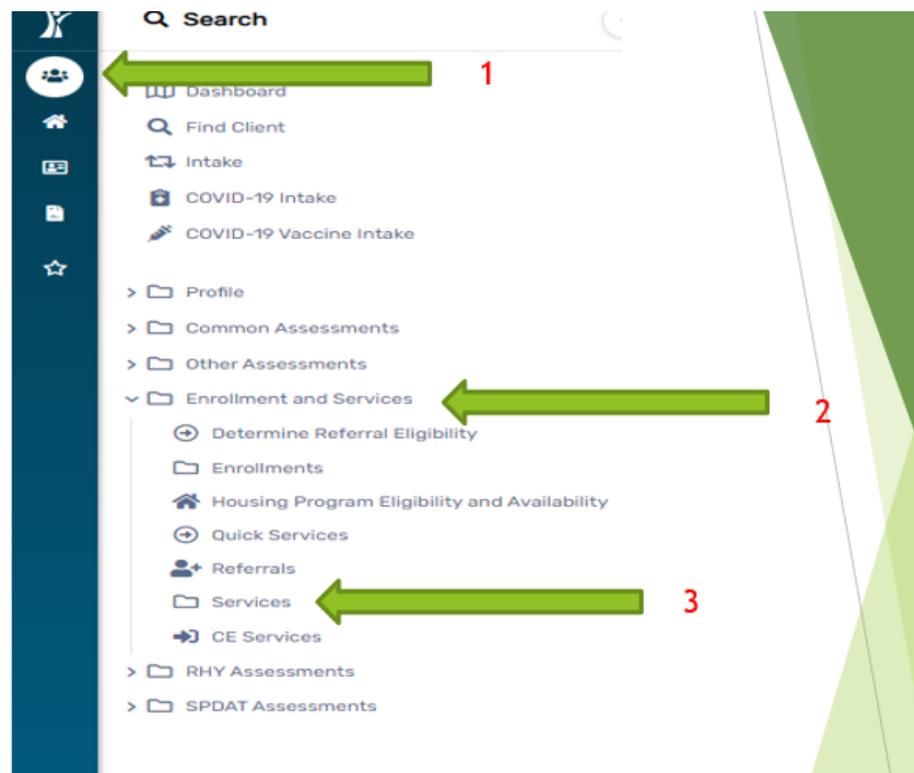
Programs:

First Time Served: N/A

| Service | Service Entries | Units | Total Value | Undu p. Client s | Families | Children in Families | Adults in Families | Seniors in Families | Total Individua ls in Families |
|---------------------------------------|--------------------|-------------|----------------|---------------------------|----------|----------------------------|-----------------------|------------------------|---|
| <u>Client Achieved Long-term Goal</u> | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |
| Duplicated Total | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |
| Unduplicated Totals | 7 | 7.00 | \$0.00 | 5 | 5 | 0 | 4 | 1 | 5 |

ENTERING OUTCOME ACHIEVEMENTS in HMIS/CMIS

1. Click on Client Dashboard
2. Click on “Enrollment and Services”
3. Click on “Services”



4. Click on “Add New Service”

5. Add Enrollment, Grant, Services
 - Follow Up Service (Outcome Achieved, Not Achieved)

2 results found

Enter the information about the service provided to the client below.

Family Income: 🔄

| | |
|------------------|------------|
| No Recent Income | |
| Family Members | 3 |
| Poverty Level | \$2,151.67 |

Enrollment: * -- SELECT --

Grant: AACY - Caregiving Youth Project

Service: Follow Up Service: Outcome Achieved

Date: 11/05/2024 📅

Units Of Measure: * Dollars Minutes Count Hours

Units: * 1.00

Unit Value: * \$0.00

Total: \$0.00

User Performing the Service: Joanna Reid 🔍

Comments:

6. Add Enrollment, Grant, Services

- Follow Up Service (Stably Housed, Unstably Housed)

The screenshot shows a web form for adding a service enrollment. A red number '6' and a green arrow point to the 'Service' dropdown menu, which is currently set to 'Stably Housed'. The form includes the following fields and options:

- Enrollment:** -- SELECT --
- Grant:** AAF - FAA Rapid Rehousing
- Service:** Stably Housed
- Date:** 11/05/2024
- Units Of Measure:** Dollars, Minutes, Count, Hours
- Units:** 1.00
- Unit Value:** \$0.00
- Total:** \$0.00
- User Performing the Service:** Joanna Reid
- Comments:** (empty text area)
- Restriction:** Restrict to Organization, Restrict to MDU/InfoRelease

At the top right, there is a 'Family Income' section with a refresh icon and a table:

| | |
|------------------|------------|
| No Recent Income | |
| Family Members | 3 |
| Poverty Level | \$2,151.67 |

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 the SAMIS Portal <https://lxm.cc/5jhnw0>

All other questions please your assigned Program Evaluator and CSD-ContractsManager email (CSD-ContactsManager@pbcgov.org).

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