Utah Ryan White Part B Program

ClientTrack

General User Guide

Division of Disease Control & Prevention

Bureau of Epidemiology

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Table of Contents

ClientTrack General User Guide

1. ABOUT THIS USER GUIDE

The purpose of this document is to provide users the information they need to become familiar with the common activities, concepts, and terminology used within ClientTrack. This document is not intended to be highly technical.

2. SYSTEM REQUIREMENTS

ClientTrack is a web-based application. In order for ClientTrack to function properly, ensure the system requirements listed below are established on your desktop or laptop.

1. **Speed:** Use a computer with DSL or faster internet connection.
2. **Browser:** ClientTrack is designed to run on Google Chrome, Fire Fox, and Internet Explorer.

   a. To ensure smooth functioning of your solution, we recommend using one of these browsers.
   b. Client Track may not operate properly in other browsers such as Netscape, Navigator, or Safari.

3. **Display:** Set your video display to 1024x768 or higher as certain pages in ClientTrack will not display properly in lower resolution settings.

3. ACCESSING CLIENTTRACK

There are two types of ClientTrack environments: Training and Production. Each environment has its own unique web address.

I. ENVIRONMENTS

A. Training Environment
https://www.clienttrack.net/UT_RW_Train

1. The Training Environment is where users can go to become familiar with and explore ClientTrack without compromising real client data.
2. Client name, addresses, and other information are fictitious and used for the purpose of practice only.
3. You will know you're in the Training Environment when you see a computer mouse image with a graduation cap as your background.

B. Production Environment
https://www.clienttrack.net/UT_RW_PROD

1. The Production Environment is where you log in to the "real" ClientTrack system. All information altered or entered into Production is real client data.
2. New users should be wary of operating out of the Production environment until they are fully familiar with the use of ClientTrack in the Training environment.

II. SIGN IN

Navigate to the ClientTrack web page for environment working in:

- Training database https://www.clienttrack.net/UT_RW_Train
- Live database https://www.clienttrack.net/UT_RW_PROD
- Username and Password
  1. Enter your username and password. Your username is your email address.
  2. Click *Sign In* or hit *Enter* on the keyboard.

A. Resolving Sign-In Errors

1. Invalid Login or Password:

   a. If you receive this error, double-check your login information. Remember that the username is not case sensitive, but the password is.

2. No Second Window Appears:

   a. When you type your username, password, and click Sign In, the ClientTrack homepage opens in a second window.
   b. If this second window does not appear, a pop-up blocker on your browser has likely prevented the page from opening.
   c. Turn off pop-up blockers.

3. Try sign-in again.

III. WORKGROUP, ORGANIZATION, AND LOCATION

To complete your login, you need to indicate which Workgroup, Organization, and Location you belong to. If you only have access to one Organization and Workgroup, you will not be prompted to enter this information. If you have access to more than one Workgroup and Organization, you have the option to switch between them once you are logged into ClientTrack.

A. Workgroup

1. Your Workgroup determines which actions you will be able to access based on your organizational role and the type of work you do.

B. Organization

1. Your Organization indicates what data you have access to and how new information entered by you should be secured.

C. Location

1. Your Location indicates the physical location where you work and is usually only used for organizations that have multiple sites.

D. Changing your Workgroup, Organization or Location

1. Before logging in, choose from dropdown menus.

   a. Click "Use these settings / Open ClientTrack using these settings" button.

2. Once you are logged in:

a. Click your Name in the upper right-hand corner.
b. Select from dropdown boxes the new Workgroup, Organization or Location you'd like to enter.
c. Click Apply to make the change.

IV. User Lockout

To make sure that unauthorized individuals cannot access a user's account, ClientTrack limits the number of sign-in attempts that occur within a specified timeframe.

A. Number of Attempts and Timeframes

1. The default number of attempts is six. After the sixth attempt, you will need to wait one hour before attempting again.

B. Lockout Notification

1. You will be notified on the login screen if you have been locked out as a result of multiple incorrect login attempts. If you have been locked out of your account, you will not be able to login, even if you have the correct password.

C. Lockout Reset

To log in after being locked out, your account can be reset in one of two ways.

1. Automatically reset

   a. Wait for one hour for your account to automatically reset.

2. System Administrator reset

   a. Contact the System Administrator who can unlock your account immediately.
      - Summer Bammes at summerbammes@utah.gov or 801-538-6217.
      - Becky Tyler at beckytyler@utah.gov or 801-538-6061.

V. Changing Passwords

To change your password, you will navigate to your User Home Workspace then complete the following steps:

1. Click on *My User Configuration* from your user Home workspace menu panel on the left of your screen.
2. Click on *Change My Password*.
3. Enter your *New Password* according to the requirements described on the screen.
4. Confirm your Password by entering it again in the *Confirm Password* box.
5. Enter your *Current Password*.
6. Click the *Change Password* button to finish.

VI. Refresh Screen

When making changes in ClientTrack and after saving the page, if you do not see the change, refresh your browser.

1. Select F5 on your keyboard, or
2. Click the refresh button on your browser
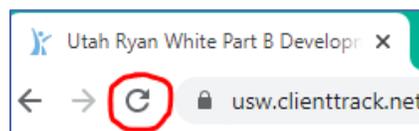
4. HELP CENTER

ClientTrack provides a Help Center which includes an Integrated Ticketing System. This system enables users to ask questions, make suggestions, or report issues from within the software. If you are experiencing problems with ClientTrack, you can submit a "Ticket."

I. Help

On the page you are experiencing an issue with, select *Help* in the top right-hand corner of your screen. You will be presented with a dialogue box designed to guide your request for help. Help options include:

1. **View the Documentation**: Download a copy of the ClientTrack Comprehensive User Guide. Once downloaded, click to open the pdf document.
2. **Watch a Video**: Opens a link to a training video on basic navigation.
3. **Keyboard Shortcuts**: Opens a document that demonstrates some combinations of keys you can use to perform a task that would normally require your mouse to navigate to.
4. **Report an issue**: There is a problem on the current page.

   a. Click Report an issue, then another window pops up.
   b. Complete basic information about your request including a description, a screenshot, and information about how to best contact you for further clarification.
   c. You can notify additional people to keep them in the loop and status of the issue, so that there are not multiple tickets submitted for the same issue.
   d. Click Submit.
   e. Issue Submission Process:
      - Issues are initially submitted to your UDOH ClientTrack Team. If they are unable to resolve the issue, they can send it to the Eccovia ClientTrack support team.
      - When an administrator chooses to send the issue to the Eccovia ClientTrack support team, a copy is made and the copy is sent so that the original issue is still available for handling by the local administrator.

5. **Ask a question**: If you have a question about the page, use the same process as #4 *Report an issue* above.
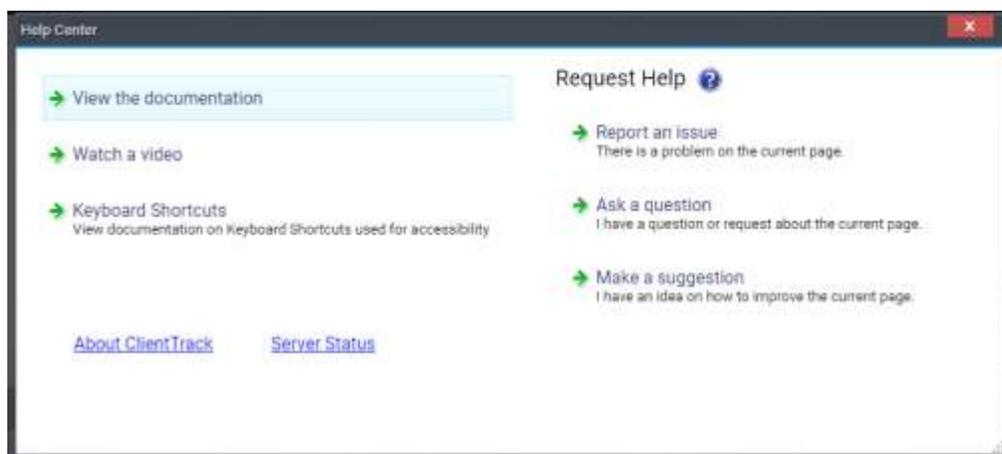
6. **Make a suggestion**: If you have a suggestion on how to improve the page, use the same process as #4 *Report an issue* above.

II. Tool Tips

ClientTrack provides Tool Tips throughout the software. These tips can be seen by resting your cursor over the help icon ⑦ placed next to specific items on the screen.

III. Page-Level Help

Most pages in ClientTrack include page-level help displayed at the top of the page as a brief written note designed to facilitate page entries.

5. BASIC CLIENTTRACK NAVIGATION

I. SCREEN TERMINOLOGY

A. Workspace

A collection of features and components which are grouped together in the ClientTrack user interface. Depending on your workgroup you are signed in under, will depend on how many workspaces you will have access to.

1. **Home:** This workspace is your "home base" as a user. Here you can view information specific to you as a user such as your User Dashboard, Enrollment List, Application List, Caseload, Paused Workflows, etc., or you can update user information like your password.
2. **Clients:** This workspace provides you with the access to information specific to a selected client. This is where users take action regarding the client, such as eligibility, enrollment changes, view application, case notes, case assignments, etc.
3. **Issues:** This workspace provides you a list of issues you have submitted, your assigned issued, tasks related to issues, etc.

B. Menu Pin

You have the option to choose the appearance of your Menu Panel using the Menu Pin icon. By clicking this pin, you can choose to Always Show the Menu, or Hide the menu when inactive.

1. **Hide the menu when inactive** – your Menu Panel will only show the icons.
2. **Show the menu** – view the full menu, click on the *Show the menu* icon in the upper left-hand corner.

C. Entity Toolbar

The Entity Toolbar identifies which entity/client you are currently working with.

1. When on the client workspace, the Entity Toolbar will display the client you have selected.
2. On the Home workspace, the Entity Toolbar will display the User's Name, Organization, and Workgroup.
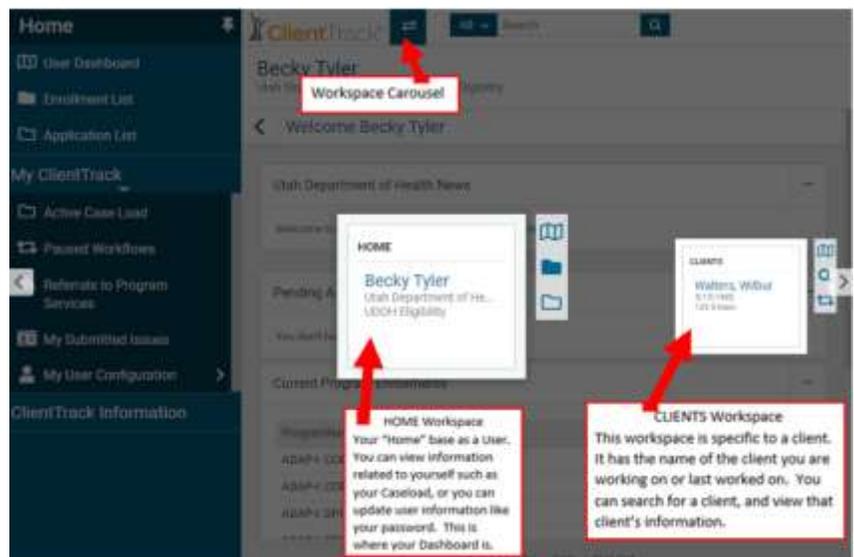
D. Workspace Carousel

The Workspace Carousel is how you change from one workspace to another.

1. Clicking the button brings up the workspaces you can navigate to. Depending on what tasks you need to accomplish, click on the corresponding workspace.

E. Global Search

The Global Search functionality will give you the ability to search both data and tasks.

1. For example, a search of the name "Smith" will return a list of all "Smiths" in the database regardless of whether it is a Client, User, Provider, etc. Clicking on the desired "Smith" will take you to the correct location in the application.
2. Similarly, if you are looking for enrollment functionality, you would type "enrollment" in the search bar. You would then be presented with a list of all locations where "enrollment" is present.

F. Fixed Header

The Fixed Header at the very top of your screen remains constant no matter where you navigate in ClientTrack. This area displays:

1. Actions – *Sign Out, Help*, and personal *Settings*.
2. Global Search bar
3. Workspace Carousel

G. Menu Panel

The Menu Panel is always found on the left side of your screen. The Menu Panel will navigate to the different areas to perform your daily user tasks such as application list, enrollment list, find client, case notes, intakes, assessments, services, and more depending on your Workgroup and Organization.

H. Primary Work Window

The Primary Work Window is the main portion of the screen where you enter, edit, view, and review data depending on which menu option has been selected.

I. Widget

A widget is a small window within the main page you are working on. These are portions of the actual page for a quick reference.

J. Action Button

The Action Button is the little blue button with an arrow in it. When clicked, a dropdown menu will populate to choose the action you want to take.

II. CLIENTTRACK TERMINOLOGY

A. Dashboards

ClientTrack uses dashboards to organize, summarize, and present information in a way that is easy to read. Dashboards are available for all entities within ClientTrack, including users, CM Agencies, UDOH, clients, providers, and more. Dashboards are typically the first page you are navigated to in each entity.

B. Forms

A form is a screen or page in ClientTrack that is used to display or collect data related to entities (CM Agency, UDOH, Clients, Providers, etc.). Depending on the user's workgroup, data can be created, updated, and/or deleted. A form typically includes multiple methods of data entry with the most common being:

1. **Text Entry:** Type data into select boxes.
2. **Date Entry:** Enter in date by typing, or selecting the calendar icon and click on date.
3. **Drop-down Lists:** Select from a set data in drop-down list.
4. **Radio Buttons:** Click button to select data.

C. Form Steps

Form steps are designed to facilitate data entry by leading the user through an orderly process displayed as bulleted steps at the top of the page which are filled in to indicate which steps have been completed.
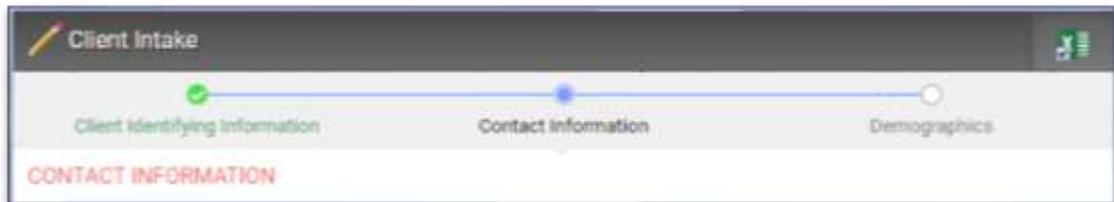
1. **Green Check:** Page has been completed, and can be returned to as needed to make changes.
2. **Blue Dot:** Current Page working on.
3. **White Dot:** Remaining page(s) to complete the form.
4. **Red Star:** Started but not complete and moved to another page.

III. Workflow

ClientTrack automates and simplifies the information collection process through the use of workflows.

A. Workflow Steps
1. The application is divided into workflow steps.
2. You can see which step you are on and how many more steps remain.
3. The workflow guides the user to the next step once the current one is completed (saved).

B. Dynamic Workflow
1. Depending on the answers and data entered, the requested data may populate or remove fields or pages.
2. Required fields are marked with a red asterisk* and may change depending on the answer to questions.

C. Workflow Pane
   1. The Workflow Pane is located on the left side of the screen and appears when a workflow has been launched.

D. Workflow Navigation
   1. To help users navigate a workflow, ClientTrack displays the completed, current, and remaining steps within the workflow.
   2. **Green Check:** Completed steps, and can be returned to as needed to make changes.
   3. **Blue Dot:** Current step working on.
   4. **White Dot:** Remaining steps within the workflow.
   5. **Red Star:** Started but not completed a step and moved to another page.
   6. Previous step: You can click on Previous step to navigate back to the previous form.
   7. Click on the previous form to navigate to back the desired form.
   8. Since ClientTrack has a dynamic workflow, you are unable to jump ahead without finishing the form you are on.
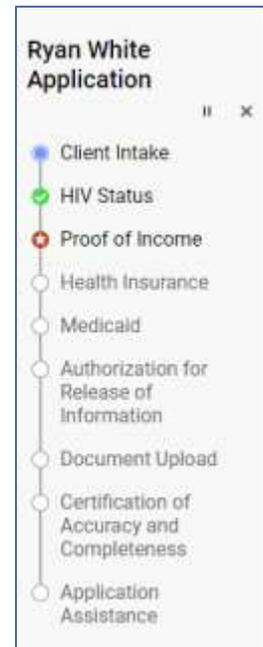
IV. Pause, End and Resume Workflows

A user may need to pause, end, and resume an intake, case note, or another portion of a workflow before they are finished.

A. Pause Workflow

If you are unable to complete a workflow at the time, but want to return to it later, pause the workflow.

   1. To pause a particular activity within your workflow, click the Pause button **II** in your workflow navigation pane on the left side of your screen.
   2. This will hold the workflow where you paused, and when you are ready to resume, it will return to the page you paused on.
   3. The paused workflow will remain in your Paused Workflow folder, until you resume or end the workflow.
   4. User paused workflows can only be seen by current user. You cannot see or resume another user's paused workflow.
   5. If you are unable to resume the workflow within the same day, best practice is to end the workflow so that another user could continue the workflow if you will be out and/or unable to complete it at a later time.
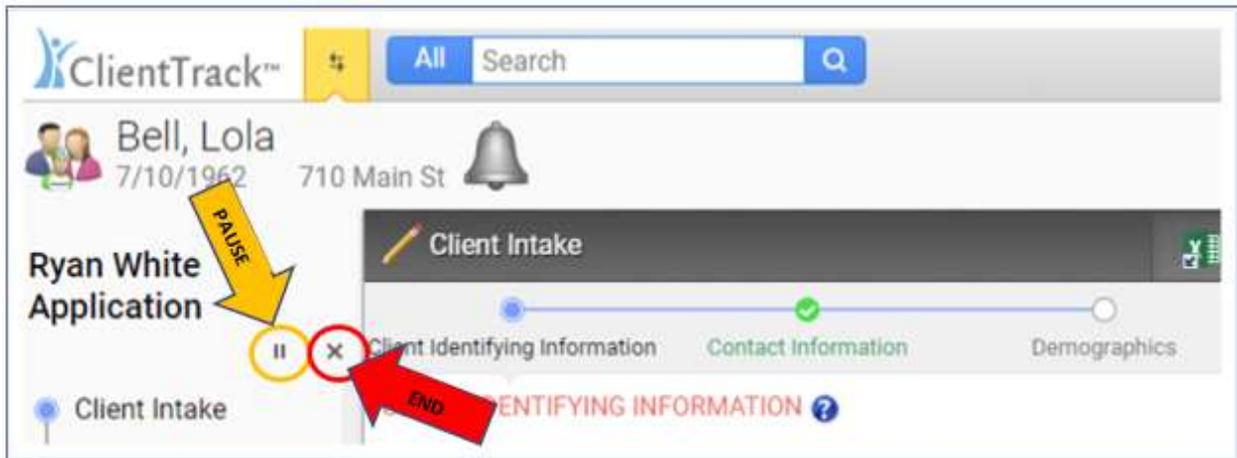
B. End Workflow

A user should end a workflow when they are no longer needing to work on or edit the client information. If the workflow is not ended, the client file will be placed in the user's paused workflow, which doesn't allow other users to access the file.

1. Every time you go into a client's file and the workflow menu appears on the left, you create a workflow.
2. When you are finished viewing, changing or updating the client's file, you will need to close the workflow, or the workflow will remain in your paused workflows history.
3. To close the workflow, click the **X** on the workflow menu.
4. A confirmation pop up window will appear to confirm if you want to cancel the workflow. Canceling the workflow will delete the current workflow you are on, but will <u>not</u> delete the data entered when you were in the workflow.

   a. Selecting Yes, you will be taken to the client's Dashboard.
   b. Selecting No, you will remain on the current page.
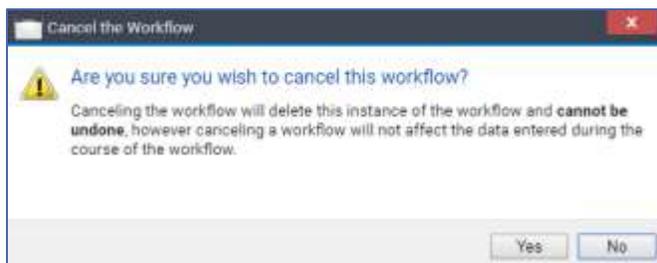
C. Resume Workflow

A user <u>must resume workflow when returning to a client who has been paused</u>. If you select the client from the application list or enrollment list and start a new workflow, you will have multiple workflows open for the same client. This causes errors to happen on the file so that the programs may not work properly. To continue working a client file which has been paused:

1. Navigate to your HOME Workspace.

2. View Paused Workflows in one of the following ways:

    a. Select Paused Workflows from the left side menu.
- Resume the workflow by clicking on the "play" icon.
- Delete the workflow by clicking the X icon. Deleting the workflow does not delete all the work completed before it was paused. It only removes the paused workflow from your list. Other users can now access the file.

    b. Select My User Configuration > My Document Check > Paused Operations.
- Resume the workflow by clicking on the folder icon.
- Restart the workflow by clicking on the arrow icon.
- End the workflow by clicking on the X icon.

3. **Best Practice:** At the end of each work day, check your paused workflows for clients you have not finished. Delete or remove the workflow so that other users can access the file if you are unable to resume. Remember, you may have workflows open that you may not be aware of, and ending your workflow will not delete the data previously entered.

V. Definitions

1. **Draft:** An application has been started but has not been submitted. The client and their case management agency can edit.
2. **Submitted:** An application has been submitted to UDOH Eligibility to make an eligibility decision. The application is "read only" for the client and case management agency. It can only be edited by a UDOH user.
3. **In Review:** An application is under review with UDOH Eligibility to determine eligibility. The application is "read only" for the client and case management agency.
4. **Insufficient:** An application was reviewed by UDOH Eligibility and has been determine incomplete. The application is now editable by the Benefit Specialist, Case Manager, or Client.
5. **Sufficient:** An application has been determined eligible by UDOH Eligibility, and the system will create an enrollment record for Ryan White. The UDOH Eligibility work must take action to enroll client in a specific program.
6. **Enrolled:** The client has been enrolled in the Program.
7. **Due for Recertification:** Enrolled in Ryan White Part B Program and the next application due is a recertification.
8. **Due for Self-Attestation:** Enrolled in Ryan White Part B Program and the next application due is a self-attestation.

9. **Dis-Enrolled:** A client has been dis-enrolled or closed from the Program. Services have been terminated.
10. **Ineligible:** An UDOH eligibility decision has been made and the client is not eligible for the Program.