Paper Application ClientTrack Data Entry Procedures

Login

1. Log into ClientTrack PRODUCTION environment – the real thing! Real clients, real data! – at the web address: https://www.clienttrack.net/UT_RW
2. Your password will be the same as you have in the Training environment.
3. If you can't get in, let Becky (or Summer) know and we will help you get in.
4. For training or to "play around" to get use to ClientTrack and how it works, log into the TRAINING environment at the web address: https://www.clienttrack.net/UT_RW_Train

Client File Organization

If you are working from a client file where you save the information the client has turned in, it is best to have as much of it complete as possible before starting. If the client is in your office going through the application with you online, gather some of the documents needed to upload and save them in a file you can easily access to upload to ClientTrack when you get to that point.

5. **Application:** Client's paper application previously completed and "signed".
6. **Proof of Residency:** Saved to a file that will be just the client's POR.
7. **Proof of Income:** Saved to a file that will be just the client's POI.
8. **Other Documentation:** Other documents should be saved under their own type so that only one type of document is uploaded to the corresponding document type.

ClientTrack Workgroup and Organization

9. **Workgroup:** Select Benefit Specialist or Case Manager.
10. **Organization:** Auto set to your organization e.g. University of Utah ID Clinic, or Utah AIDS Foundation.

Find Client

11. **Enrollment List**: From your Home Workspace, select Enrollment List. You must always search for the client here. If the client is currently enrolled in the Program, the recertification needs to start from the Enrollment List.
    a. If client ***IS*** on the Enrollment List:
        i. Click the Action Button.
        ii. Select **Recertification**.
            - All clients were auto set to Recertification during the migration. If the client has a Self-Attestation, you will need to still select Recertification and enter required fields.
    b. Proceed to enter the information from the Recertification Form.

i. If you have a Self-Attestation, you may need to go back in your records and pull the previous Recertification form to be able to complete and submit the form.

c. If "Recertification" is not an option, it is too early to start the recertification process. This can only be done when the client is in the 5th or 6th month of their eligibility period.

12. **Client Workspace:** If the client ***IS NOT*** **on the Enrollment List**:
    a. Go to the Client Workspace.
    b. Select **Find Client**.
    c. Search for client.
    d. If client ***IS*** found:
        i. Select **New Ryan White Application**
        ii. Select **Use the current client**
        iii. Proceed to enter the information from the Recertification Form (application). You will not have to enter all the client information – name, DOB, SSN, etc. If the fields are not already populated with the information, cancel the workflow and start over, and select *Use the current client.*
    e. If client ***IS NOT*** found:
        i. You should be working with a **new client** who has never been on Utah Ryan White Part B in the past.
        ii. You should have an Application Form (not a Recertification or Self-Attestation).
        iii. Select **Add a new client**
        iv. Proceed to enter in all the client contact information – name, DOB, SSN, etc., address, phone, etc., and Ethnicity and Race. Then the rest of the application information.

Required ClientTrack Fields not on current application

The paper application does not have all the information on it that we are now gathering into ClientTrack. The following fields are not on the current application and you will have to enter something into the required fields.

Client Intake

13. **Pregnancy Status:** If female, select "Don't Know".
14. **Age of Household family member:** If the application does not have an age for a household member, empty or refused etc., enter the age of 130.

Health Insurance

15. **Add New Health Insurance Type:**
    a. **Insurance Effective Start and End Date:** If this is not listed, enter the plan year Start Month (use the 1st for start, and the last day of the month for end). If not listed, use end date as 12/31/2099.
    b. **Insurance Provider:** If client has listed their provider please type in the insurer, e.g. BCBS, Regence, United, Select Health, etc. If not on the application, enter the type e.g. Employer, Spouse, etc.
    c. **High Risk Pool:** Select No.
    d. **Medicare or Veterans Health Administration (VA)**

i. **Effective Start Date**: If you do not have the start date, enter the date of application.
ii. **Effective End Date:** Enter 12/31/2099.
iii. **High Risk Pool:** Select No
iv. **HIV Provider In-Network**: Select Yes
v. **Access to HIV Medication**: Select Yes
vi. **Out of Pocket Max**: Enter $0
vii. **Select One**: Select Individual
viii. **Amount Contributed to Out of Pocket Max**: Select $0

16. **DPI Coverage:** If a client is covered with the Program's DPI insurance, in ClientTrack, we are selecting No for "Do you have health insurance…?"
    a. **No Health Insurance – Uninsured:** Select "I do not have health insurance available to me."
17. **Not Applicable, seeking SS or CM Only:** Select "No" for "Do You Have Health Insurance?"
    a. **No Health Insurance – Uninsured:** Select "Other (case manager must submit written justification)". You will need to upload the Program document for explanation.
    b. **No Health Insurance – Employer:** Depending on how the client has completed the application, make the best selection available. For example, but not limited to:
        i. If client has no earned income (wages), select "I am unemployed".
        ii. If client reported wages from employer, select "My employer offers it, but I am not eligible."
            - Select Other. You will need to upload a document at the end of the application.
        iii. If self-employed, select "I am self-employed and do not offer it to anyone"
    c. **No Health Insurance – Spouse:** Depending on how the client has completed the application, make the best selection available. For example, but not limited to:
        i. If client is not married, select I am not married,
        ii. If client's spouse has earned income, select "My spouse's employer offers it, but I am not eligible"
            - Select Other. You will need to upload a document at the end of the application.
    d. **No Health Insurance – Parent**: Select "I am age 26 or older". If client is under age 26, depending on how the client has completed the application, make the best selection available. For example, but not limited to:
        i. If client's parent does not have earned income, select "My parent is unemployed"
        ii. If client's parent has earned income, select "My parent's employer does offer it, but I am not eligible"
            - Select Other. You will need to upload a document at the end of the application.

Authorization for Release of Information:

18. **Type:** Select "Other"
19. **Aware of Client Situation:** Select "Unknown".

Document Upload

20. **Proof of Residency "POR":** Upload the corresponding document saved in the client's folder.
21. **Proof of Income "POI":** Upload the corresponding document saved in the client's folder.
22. **Proof of Income – Other household Member or Spouse:** Upload the spouse's income saved in the client's folder.
23. **No Health Insurance – Employer/Parent/Spouse:** Upload the Program document provided for migration purposes.
24. **Other Document:** If you have other documents that do not fit under the type above, select Other Document. In the "Please Describe" field type what document it is.
    a. **If Apply for SS or CM Only:** In the "Please Describe" field type in "Applied SS/CM-Only". Attach form sent from UDOH titled "Other Documentation for SS and CM-Only".
    b. **If separate document for signature:** If you have an email, text message, or other document for "signature", select Other and in the "Please Describe" Enter "Client Signature" followed by the date signed.

Certification of Accuracy and Completeness

25. Client signature enter "X".

Application Assistance

26. **Program Applied For:** Select program marked on the application. If you are applying for a Restriction program, we will need explanation, then eligibility will make that determination and select the program they qualify for.
    a. **DPI:** If DPI is selected choose the DPI program corresponding to the Case Management Agency the application was completed by:
        i. **University Clinic:** Select DPI Regence
        ii. **UAF:** Select DPI SelectHealth
27. **Request to Expedite Date:** Enter the date request expedited to be completed.
28. **Contact Information for Follow-up:** Enter your name and phone number. Also, if client "signed" the form electronically (Text, email, etc) "Signature Date MM/DD/YY".

Pausing and Resuming Workflow

29. If you are unable to finish the application click the Pause button.
30. If you receive an error and "kicked out" of the workflow, or move to another part of ClientTrack without selecting the Pause button, ClientTrack puts the workflow in your Pause Workflow list.
31. **Resume Workflow:** You MUST Resume Workflow to avoid errors – don't start over from the beginning.
    a. Go to your Home workspace.
    b. Select **Pause Workflows**, and a list of paused workflows will be displayed.
    c. **If there is *more than one* workflow for the same client**, delete all workflows for the client by clicking the X. Then continue the application entry by:
        i. Go to the Application List and find the client.
        ii. Click the Action Button.
        iii. Select View Recertification (or Self-Attestation).
        iv. Continue through the workflow by selecting Save, Next, or Finish.

Submitting Help Tickets

If you receive an error on a page, are stuck and not able to continue, or have problems with the application not working as you think it should be, submit a Help Ticket.

32. **Screenshot:** Take a screenshot or snip of the page you are on. Make sure the client name and problem area are included on the screenshot or snip.
33. **Stay on the page to submit ticket:** The page with the error, is where you need to create the ticket from. There are “behind the scenes” screen captures for the engineers to view to find and fix the problem.
34. **Title:** The title of the error needs to be short, specific, and to the point. Do not just put the title of the error. For example, if you get an error stating “Something’s wrong here…” Don’t just title it Something’s wrong here, be more specific of what happened before. Example, “Proof of Income error” or “Error message when trying to save”
35. **Include Client ID:** Enter the Client ID with the title of the error.
36. **DETAILS:** In the description of the error, give details, details, details.
    a. What client you are working on.
    b. What happened before the error.
    c. Steps you took that lead up to the error.
    d. What you were trying to do.
    e. Etc.