

Assessments

Preface

This is intended to be a living document. All things change; this is especially true in the world of databases and IT (Information Technology). I'll do my best to update documents, like the tutorial below, as often as possible. Please let me know what you would like to see included. I'm always open to suggestions! This particular tutorial is structured to help you understand the concept of the Master and Individual Assessments. It will demonstrate how to view, edit, and create, records for both types.

Key Terms

- **Master Assessment:** A comprehensive collection of Individual Assessments that are grouped together in such a way as to provide a comprehensive basis for reporting and data analysis. Each Master Assessment is defined by the type selected (e.g. Entry, Exit, Follow-up, In-Program, etc) and the program name it is collected data for. A Master Assessment must be completed for each program entry, exit, and for every year that a client participates in a program.
- **Individual Assessment:** A pre-defined category of measurement used to define a range of, and/or capture, data related to a specific point-in-time. Such categories often include: Financial Status, Chronic Homelessness, Education, Universal Data, etc. Individual Assessments can be part of a Master Assessment, or they may be stand alone updates for a client as they progress through a program.

Navigating ClientTrack

Master Assessments

- **1:** On the Client's Tab go to Assessments. You should now see a screen that resembles the image in *Figure 1*. From this screen you can view and/or edit any Master Assessment record you've ever completed for the client.
 - The **ONLY** time a Master Assessment or Individual Assessment should ever be edited is in the event of data entry errors. Since every assessment represents a point-in-time for the client, it will never be necessary to change the answers or dates given by the client.
- **2.** If you wish to view all the Individual Assessments, which are part of a specific Master Assessment, select the **Edit Arrow** (See *Figure 1.1 and Figure 2*) for the Master Assessment you wish to view/edit.

- The **Edit Option** (*See Figure 2*) will allow you to change information pertaining to the date the Master Assessment was completed, the program it was completed for, and its type (e.g. entry, exit, etc).
- The **View Status** (*See Figure 2*) provides the ability to view the Individual Assessments that comprise a Master Assessment. A check mark will be displayed next to the Individual Assessments that have been completed for the Master Assessment. It is also possible to directly access any Individual Assessment, which is part of a Master Assessment, using the View Status function and selecting the Individual Assessment you wish to view.

Individual Assessments

- The same tools utilized for modifying, creating, and viewing Master Assessments can also be used for Individual Assessments. The primary purpose of the Individual Assessment is to bridge data gaps between program milestones (e.g. program entry, annual update, and program exit). It is entirely unnecessary to complete an entire Master Assessment simply to update the Financial Assessment data on a client. Instead, go to the Financial Assessment menu and select the Add New function (*See Figure 3 and Figure 4*).

Data Entry Tips

- **1)** If your Master Assessment was created as part of a workflow, always review it after completion of the workflow. The best approach is to find your Master Assessment in the list provided in the Assessment menu option, select the Arrow next to the Master Assessment record and either **View Option**.
- It is also important to check that you have the correct assessment date, program type, and assessment type. You can verify these data fields via the **Edit Option**.

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Welcome David Lewis

CT ENTERPRISE

Home Clients Issues Providers Housing

Case Management

- Spokane Program Entry
- Spokane Program Exit
- HPRP Intake
- HPRP Exit
- WFF Program Entry
- WFF Program Exit
- Add New Client
- Find Client
- Client Dashboard
- Quick Intake
- Paused Workflows
- Edit Client
- Assessments
 - Universal Data
 - Chronic Homeless
 - Barriers
 - Domestic Violence
 - Financial
 - Quick Assessment
 - Employment
- Housing Locator Tem
- Homeless
- Case Management

Sauers, Eddie Social Security Number: 4/1/1932 12:00:00 AM
 Date of Birth: 4/1/1932 12:00:00 AM

Master Assessments

Below is a list of Master Assessments that have been created for this client. To cr

2 records found.

	Date ▼	Type ▲	Progr
▶	10/01/2010	Entry	VOA--
▶	10/01/2010	Exit	VOA--

Figure 1.1
 Edit Arrows: Select the drop-down error for the record you wish to view or modify. (See Figure 2 for additional information)

Master Assessments (Remember: a Master Assessment acts as a virtual 'cover sheet' to group together Individual Assessments.)

Individual Assessments (Remember: these can be stand alone or part of a Master Assessment)

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Figure 1 (Master Assessment Screen Shot): The above demonstrates the different components involved in viewing, creating, and/or modifying, a Master Assessment, or Individual Assessment, in ClientTrack.

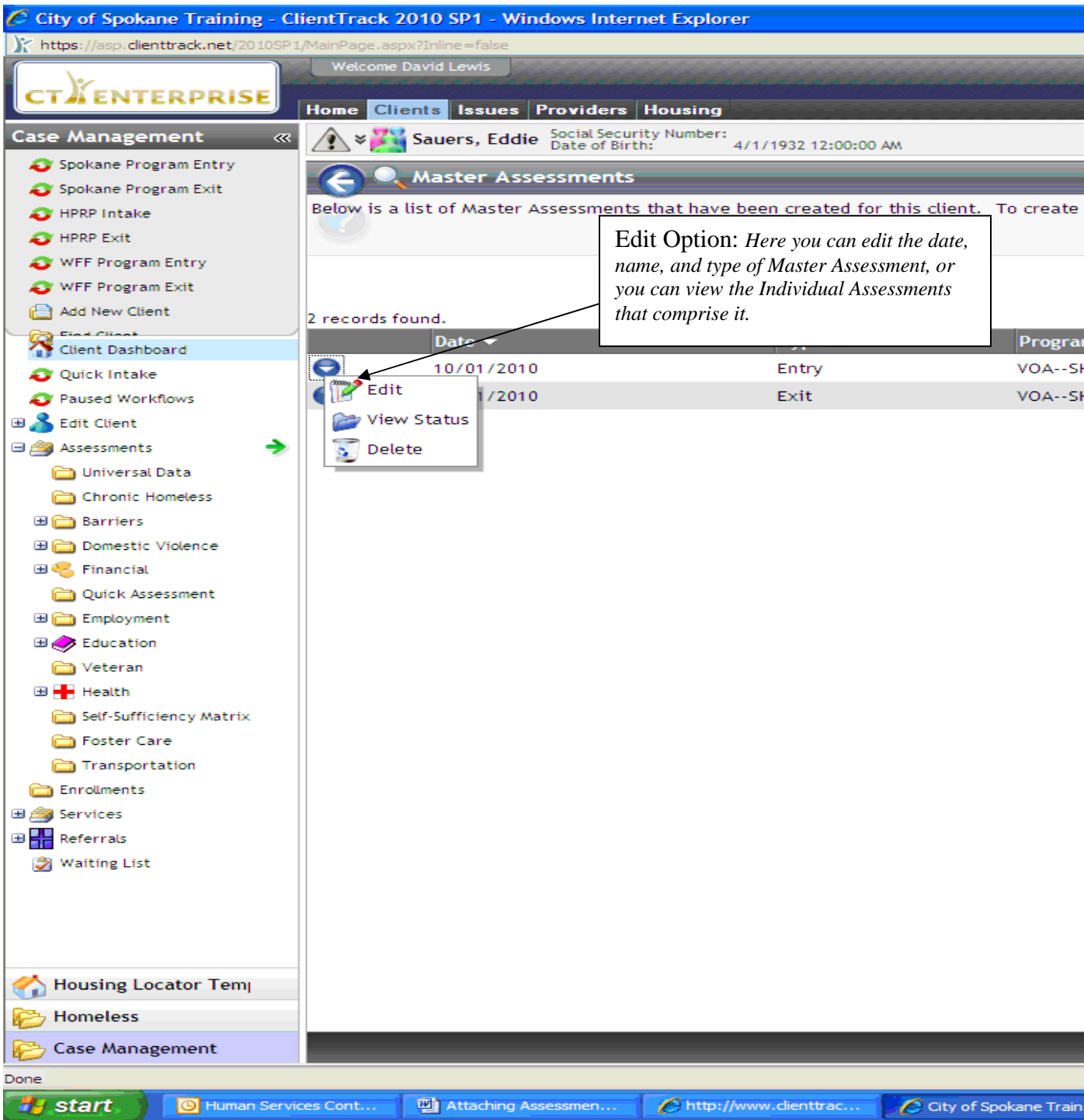


Figure 2 (Edit Options): The above represent the Edit and Viewing options available for Assessment Records. Each Edit Option list may differ based on the type of form being viewed or modified. For instance, you may have a wider range of available options for editing a service record.

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Welcome David Lewis (Training)

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HPRP, Service Social Security Number: Date of Birth: 1/1/1988 12:00:00 AM

Universal Data Assessments

Below is a list of the client's history of universal data elements. Universal data elements can be added, deleted, or edited. To add a new record, click Add New. To edit an existing record, click Edit.

1 record found.

Date	Type	Description
10/05/2010	Entry	Unstably housed and at-risk of losing their housing

Universal Data: In this screen shot the Individual Assessment menu for the Universal Data Assessment has been selected. From here you can view every Universal Data Assessment that has ever been completed for the selected client.

Individual Assessment: Each of the Assessments listed under the Assessment Menu provide a comprehensive list of all assessments completed for the assessment topic.

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Figure 3 (Individual Assessment): In the above screen each Individual Assessment is viewable. An Individual Assessment can be a stand alone, or it can be associated with a Master Assessment.

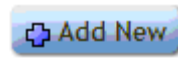


Figure 4 (Add New Function): All assessment search forms (look for a magnifying glass symbol) have the feature shown above as part of the form. If you select the Add New function you will be able to create a new assessment record.