



Client Track Agency Administration

Instructions and
help for Agency
Administrators
Using Client Track

In this document:

- Basic Role of Agency Admin
- User and Password Management
- Information MCW Needs to Add a New User
- Resetting User Passwords
- Setting-up My Teams
- Eliminating Duplicate Clients
- Adding a New Program to Client Track

Roles: Agency Admin vs. Key User

Agency Administrator Role and Tasks:

Every agency should have at least 1 Agency Administrator who is considered the point person/expert on the database. Generally, the admin user has its role clearly defined in their job description and they are assigned a certain number of hours in the workweek to complete tasks and fulfill role requirements. It is suggested for larger agencies 60+ users that there be a second agency admin or at least a backup so that support can be offered if the admin leaves the agency or is unavailable for a period of time.

TRAINING:

- Is the key trainer on the database for the agency
- Tracks quality identifies data entry problems that need to be addressed

DATABASE WIZARD FOR THE AGENCY

- Understands how the database works for the agency
- Suggests and reviews policies and procedures that impact how the database works or would work better for the agency
- Understands how different workgroups, workflows function
- Troubleshoots, and solves issues encountered by users and, as needed, reports difficult issues to MCW for resolution
- Develops and runs standard reports and creates ad-hoc reports for the agency using Data Explorer.
- Exports data explorer questions or other reports to excel to conduct more detailed analysis.
- Works to ensure database security and reports any possible security breaches to MCW

SUPPORTS AGENCY TRANSITION AND CHANGES

- Helps plan integration (and program changes) of the database into the agency
- Works with Executive Sponsor in determining how program changes at the agency impact the database and/or reports to community or funders
- Suggests changes and/or revisions to the database to MCW in writing and tracks the agreed upon changes.

Appended, 7/11/14

- Test new revisions and/or changes in the agency database
- Tracks users as they leave the agency and identifies new users – submitting new user requests to MCW

LIAISON

- Communicates key database decisions and changes to Executive Sponsor, management and staff and evaluates staff reactions to database
- Attends database MCW agency admin meetings
- Communicates new functionality and development (including upgrades) to agency staff and leadership.

Key User Role and Tasks:

Each distinct location should have one, for support purposes. There should be one key user for every fifteen users, if there are more than fifteen users at any one location.

TRAINING

- Understands how the database works for program or location areas within an agency
- Is the first group that gets trained on new revisions and changes
- Trains new users on the database within their program or location area
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TROUBLESHOOTING

- Is the first line of support for users within their area
- May help with testing new revisions
- Help identify issues and reports problems to agency administrator.

REPORTING AND AGENCY ADMIN SUPPORT

- May develop simple reports and/or ad-hoc queries (long-term)
 - Suggest changes and/or revisions to the agency administrator
 - Takes over key responsibilities of the agency administrator when the agency admin is absent.
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Passwords and User Management

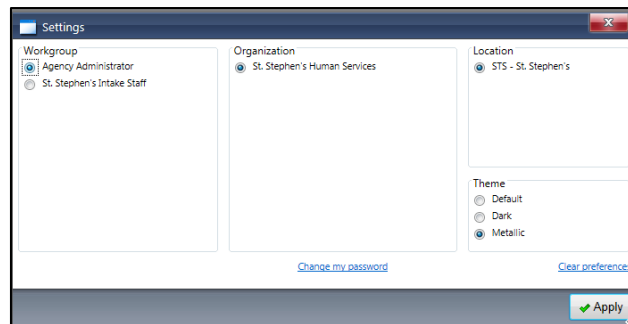
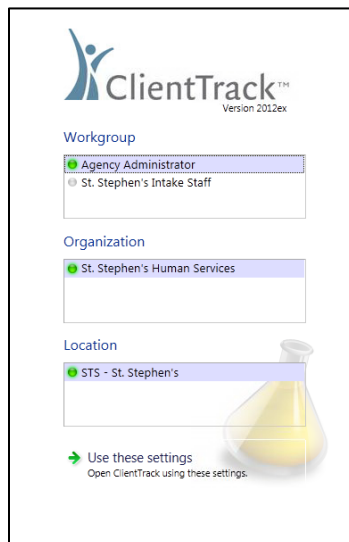
Agency Administrators manages users in the Agency Administor Workgroup. In this workgroup they can change user passwords if the user has forgotten their password, inactivate users who are no longer working for the agency, and reactivate users.

A user may be inactive if:

- The user does not log in for three months (note that the user will look like the user is still active until they try to log in to the system)
- The user no longer works for the agency and has been inactivated;
- The user tried to log in 7 times with the incorrect password and their account was locked for two hours

ACCESSING THE AGENCY ADMINISTRATOR’S WORKGROUP

An Agency Administrator can check the account status of a user by logging into the Agency Administrator Workgroup at initial login or by clicking on settings and selecting the workgroup.

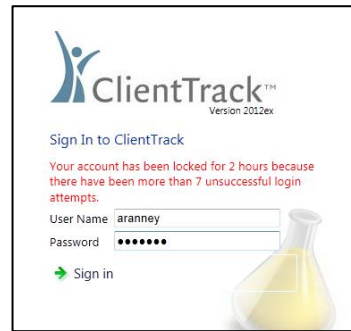


Once you are logged into the Agency Administrator Workgroup. The page should default to Manage Users form, otherwise select the Manage Users icon in the left hand Menu.

The Manage Users Search Menu enables you to see the last time the user has logged into their account, if a user has been temporary disabled due to too many incorrect attempts to log in, or if the user has been inactivated due to no activity for 3 months or longer. The next page is a screen shot of what a user sees, if they have an incorrect login and if they’ve reached their 7 unsuccessful log-in attempts.



Incorrect Log-in



Locked status after 7 incorrect log-ins

INCORRECT LOG-IN

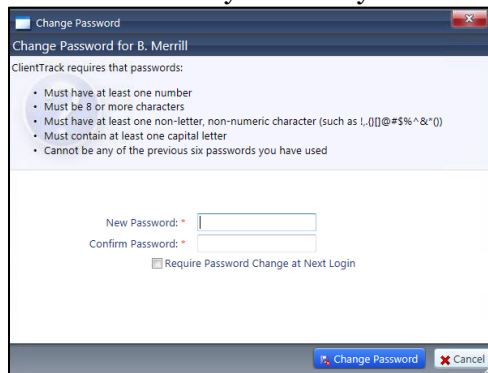
If a user receives a message that their username/password is incorrect the user has 6 more tries to log in with the correct user name or password. If the user does not successfully type in the correct username or password by the 7th try, their account will be locked for 2 hours. After 2 hours, they can try again or the Agency Administrator can reset their password. If their account gets disabled for this reason, not even an agency admin can reset it; the user will have to wait until 2 hours have passed.

Reasons for receiving an incorrect log-in message:

- The user accidentally typed in the wrong username or password;
- The user forgot their username or password;
- The user does not yet have a username or password;

RESETTING THE USER'S PASSWORD

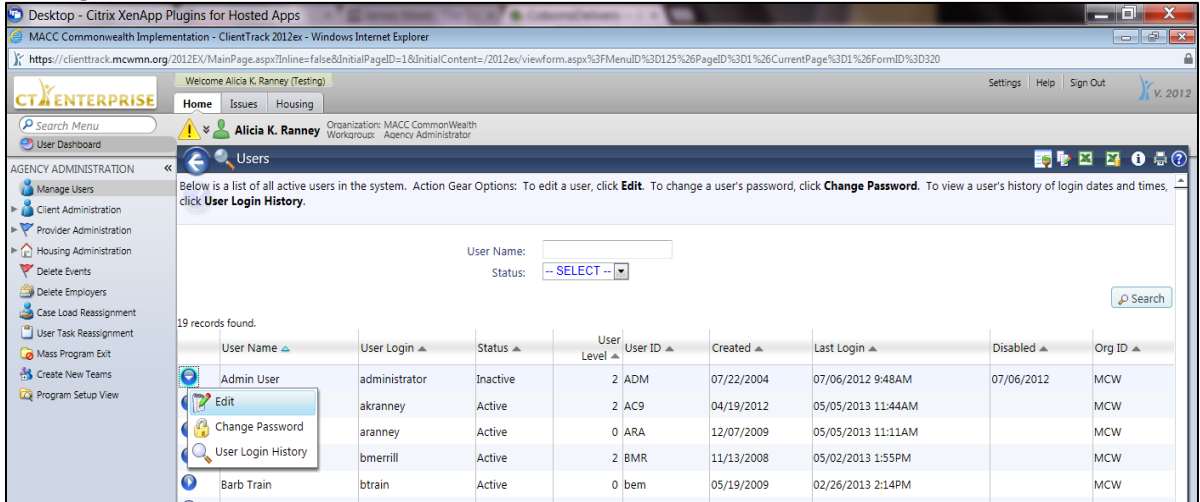
1. In the Agency Administrator's Workgroup, select Manage User's icon in the menu on the left hand side of the screen. Then find the user who's password you need to change.
2. Select the blue action gear next to the user who's password you need to reset and click on Change Password.
3. Type in the a new Temporary Password and click on the "Require Change At Next Login" so that the user can type in a Password they can easily remember.



REACTIVATING A USER'S STATUS

If a User has not logged in for 3 months or longer, their Username will be deactivated at the time they next time they try to log in. Follow the directions below to reactivate the user's status.

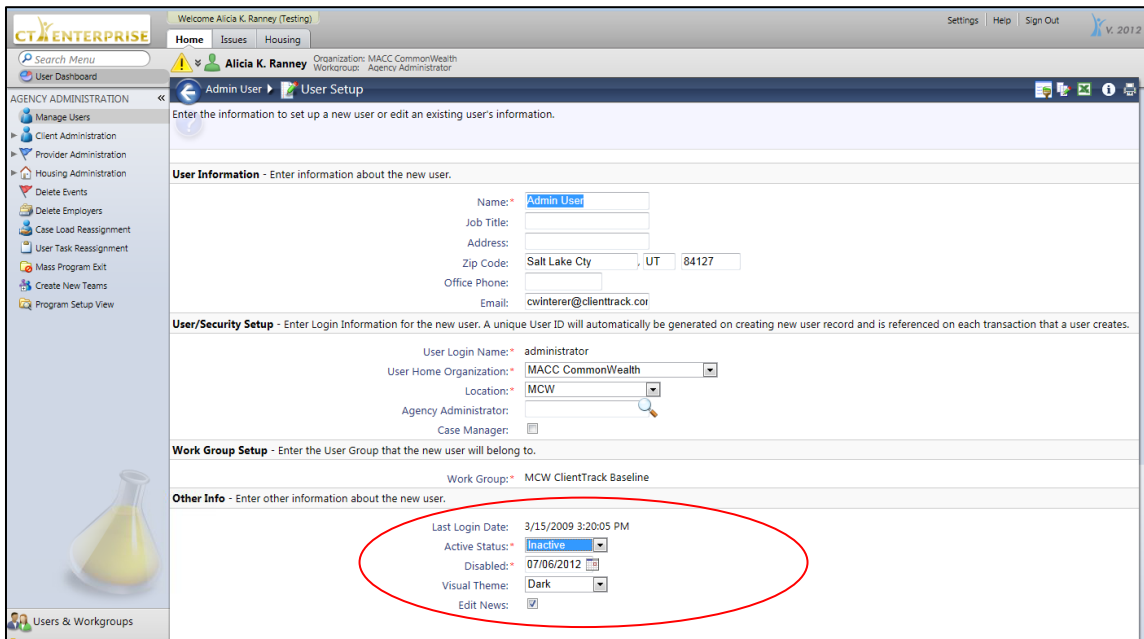
1. After logging into the Agency Administrator Workgroup, find the deactivated user in the Manage User list, click on the Action Gear next to their name and select Edit.



The screenshot shows the 'Users' management page in ClientTrack 2012ex. The page title is 'Users' and it displays a list of 19 records. The 'Admin User' is highlighted, and the 'Edit' action gear is selected. The table below shows the user details:

User Name	User Login	Status	User Level	User ID	Created	Last Login	Disabled	Org ID
Admin User	administrator	Inactive	2	ADM	07/22/2004	07/06/2012 9:48AM	07/06/2012	MCW
akranney	akranney	Active	2	AC9	04/19/2012	05/05/2013 11:44AM		MCW
aranney	aranney	Active	0	ARA	12/07/2009	05/05/2013 11:11AM		MCW
bmerrill	bmerrill	Active	2	BMR	11/13/2008	05/02/2013 1:55PM		MCW
Barb Train	btrain	Active	0	bem	05/19/2009	02/26/2013 2:14PM		MCW

2. Change their Active Status from Deactive to Active and be sure to delete the date in the field next to Disabled Date.



The screenshot shows the 'User Setup' page for the 'Admin User'. The 'Active Status' dropdown is set to 'Inactive', and the 'Disabled' date field is highlighted with a red circle. The 'Last Login Date' is 3/15/2009 3:20:05 PM. The 'Disabled' date is 07/06/2012. The 'Visual Theme' is set to 'Dark'.

User Information - Enter information about the new user.

Name: Admin User
Job Title:
Address:
Zip Code: Salt Lake Cty, UT 84127
Office Phone:
Email: cwinterer@clienttrack.cor

User/Security Setup - Enter Login Information for the new user. A unique User ID will automatically be generated on creating new user record and is referenced on each transaction that a user creates.

User Login Name: administrator
User Home Organization: MACC Commonwealth
Location: MCW
Agency Administrator:
Case Manager:

Work Group Setup - Enter the User Group that the new user will belong to.

Work Group: MCW ClientTrack Baseline

Other Info - Enter other information about the new user.

Last Login Date: 3/15/2009 3:20:05 PM
Active Status: Inactive
Disabled: 07/06/2012
Visual Theme: Dark
Edit News:

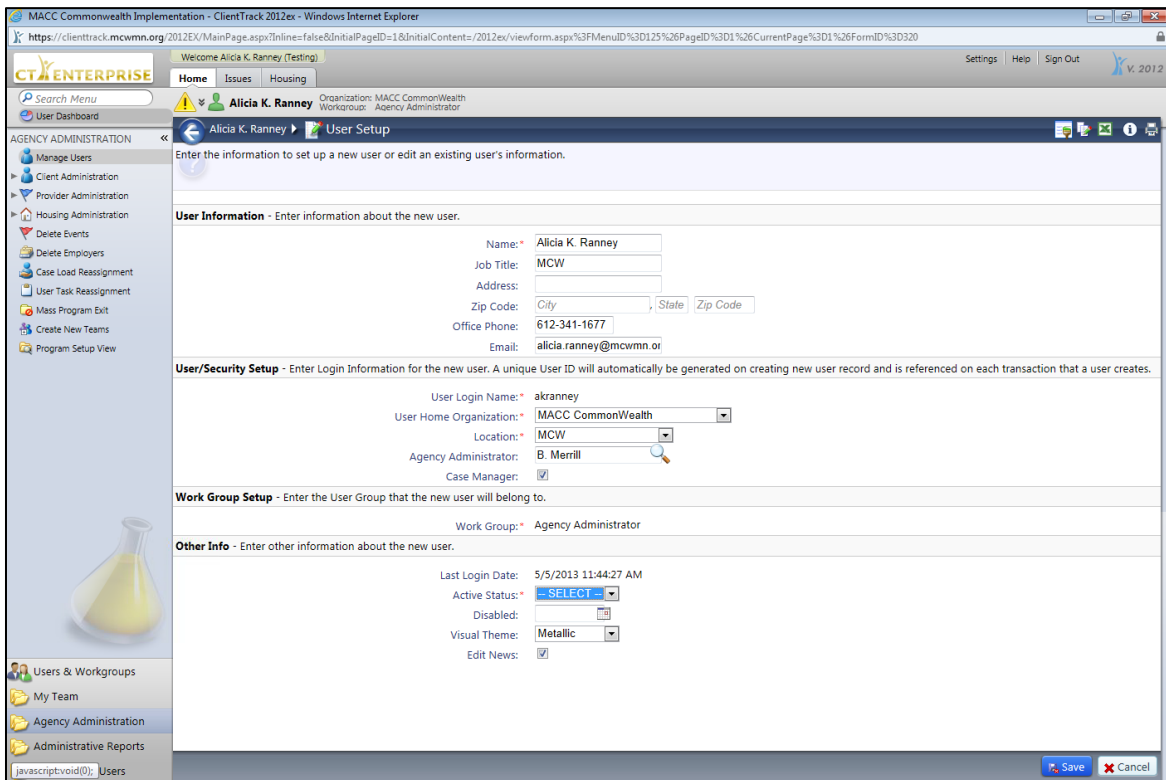
DISABLING A USER'S STATUS

If a user is no longer at your agency or using Client Track it is important to disable their status for two reasons:

1. For security! A user who no longer is employed at your agency should not be permitted to access agency data. Unfortunately, in the history of database breaches it is often times a disgruntled former employee who ends up doing the most damage to a database they should no longer have access to use.
2. For cost! Depending on your agencies contractual agreement with MCW and the total number of users your agency has contracted to pay for, your agency might have a vested interest in keeping the total number of users to a minimum.

Disabling a User

1. To disable a user, find the user in the Manage User list, click on the Action Gear next to their name and select Edit.
2. Change their Active Status to Inactive and Type in a Disabled Date.



The screenshot shows the 'User Setup' form in the ClientTrack 2012ex application. The form is divided into several sections for user configuration:

- User Information:** Fields for Name (Alicia K. Ranney), Job Title (MCW), Address, Zip Code (City, State, Zip Code), Office Phone (612-341-1677), and Email (alicia.ranney@mcwmn.or).
- User/Security Setup:** Fields for User Login Name (akranney), User Home Organization (MACC CommonWealth), Location (MCW), Agency Administrator (B. Merrill), and Case Manager (checked).
- Work Group Setup:** Field for Work Group (Agency Administrator).
- Other Info:** Fields for Last Login Date (5/5/2013 11:44:27 AM), Active Status (a dropdown menu currently set to '- SELECT -'), Disabled (a date field), Visual Theme (Metallic), and Edit News (checked).

The form includes a 'Save' button and a 'Cancel' button at the bottom right. The left sidebar shows navigation options like 'Manage Users', 'Client Administration', and 'Provider Administration'.



New User Set Up in Client Track: What Info MCW Needs

User First and Last Name	
Workgroup (if agency has multiple workgroups – most do not)	
Job Title	
E-mail address	
Phone number (optional)	
Default Location (if your agency has more than one location)	
Who is agency administrator (if your agency has more than one administrator)	
Case Manager (Y/N) – Defaults to No	
Access to Case Notes (Y/N) – Defaults to No	
Access to Data Explorer (Y/N) – Defaults to No	
Delete Privileges for Services and Assessments Only (Y/N)	

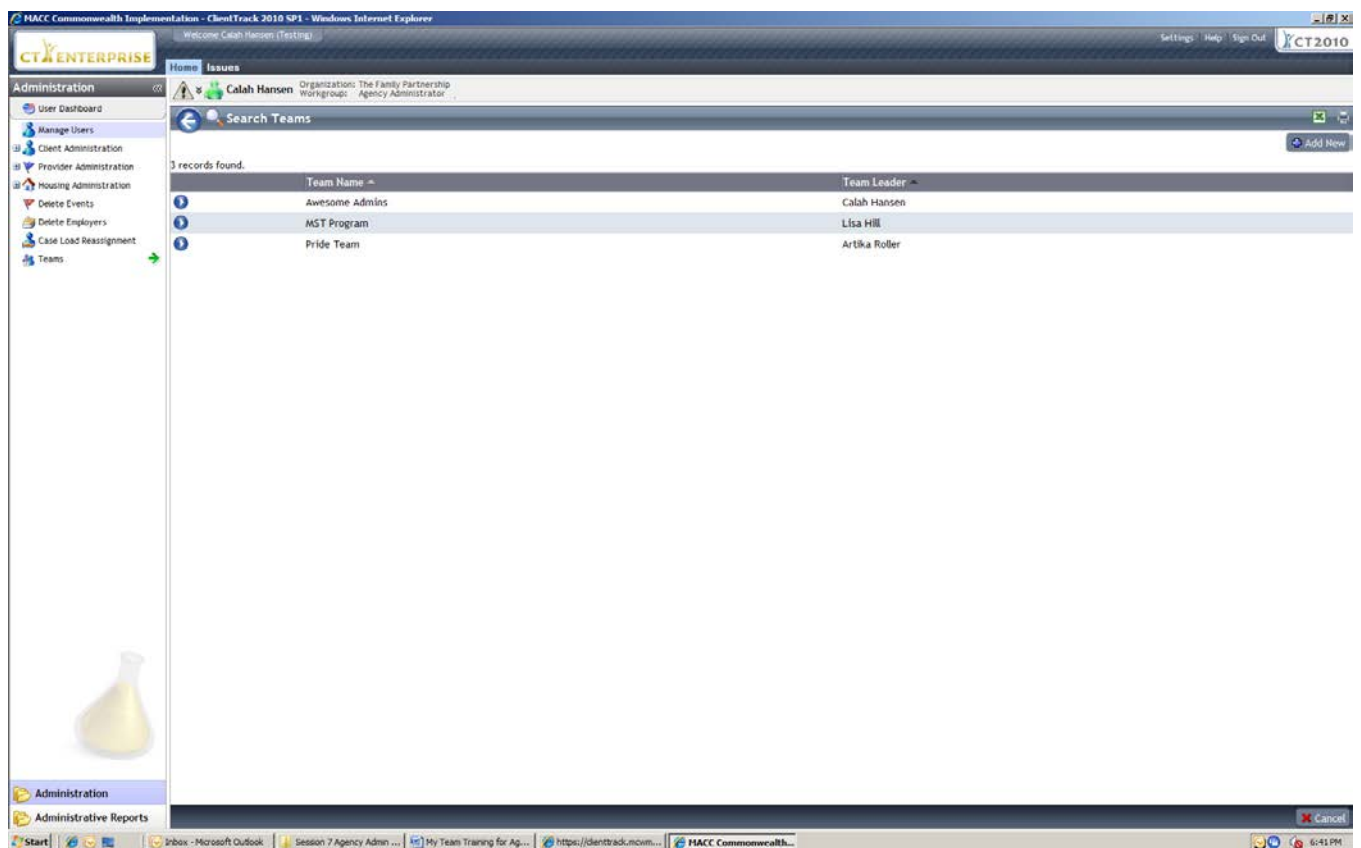
Once the user is set up in both databases, we will send you the username and password for initial entry into Client Track.

“My Team” for Agency Administrators

The “My Team” tab provides both team members and supervisors view of core activities such as cases, services, tasks and client goals across the team and is not dependant on program or location. The design of the “My Team” tab allows a user or supervisor to participate on multiple teams. The agency administrator has the ability to create the teams for their organization. Each team member has the ability to add other users to a team that they currently participate in. Members are able to view cases, services, tasks and client goals across the team.

CREATING A NEW TEAM AND ADDING TEAM MEMBERS

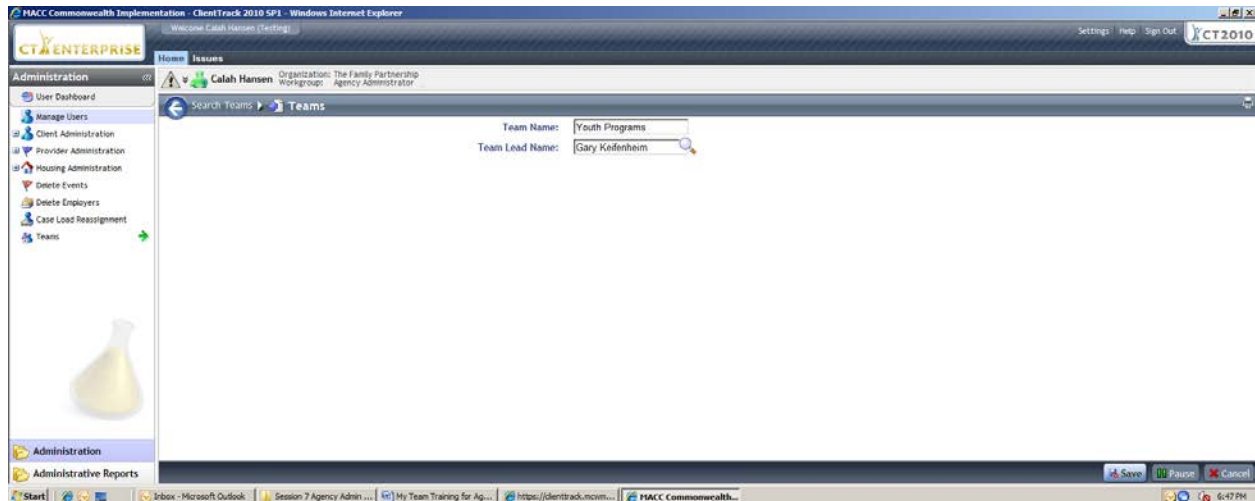
1. Login to the “Agency Administrator Workgroup”
2. On the Home Tab/Administration, click on “Teams” in the left navigational pane then click on “Add New” button in the upper right corner.



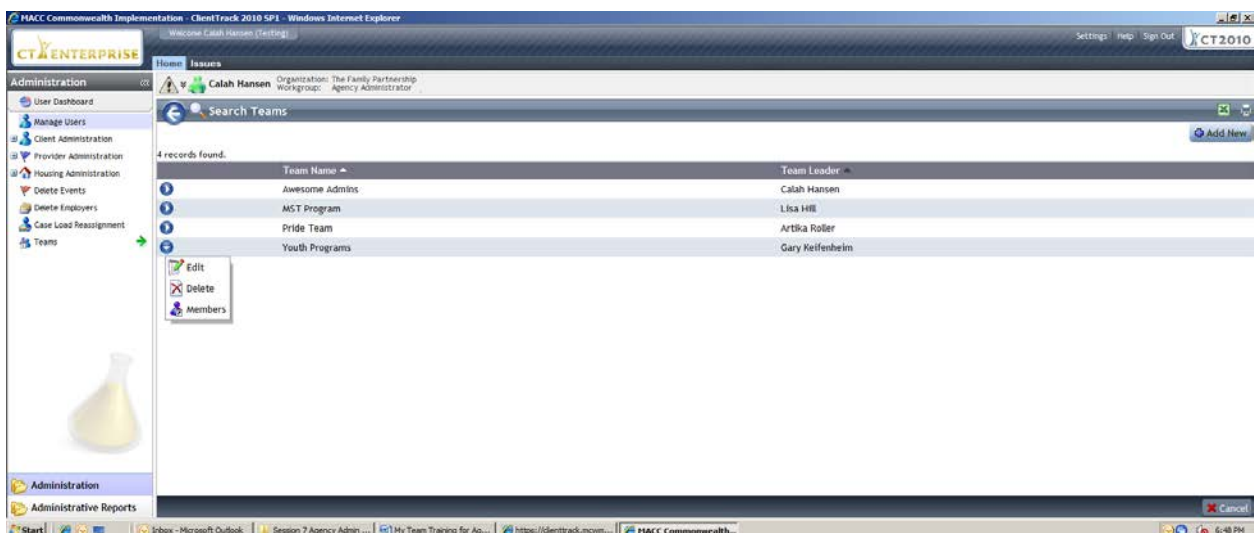
The screenshot shows the 'Search Teams' page in the MACC CommonWealth Enterprise application. The page displays a table with 3 records found. The table has two columns: 'Team Name' and 'Team Leader'. The records are:

Team Name	Team Leader
Awesome Admins	Calah Hansen
MST Program	Lisa Hill
Pride Team	Artika Roller

3. Type in the Team Name and click on the magnifying glass to look up the user name who will be the Team Lead. The Team Lead might be the supervisor or manager for the program. Note that you will have to also add the person who is the Team Lead as a member for the team so they can have access to view information for members of the team. Click save when done.

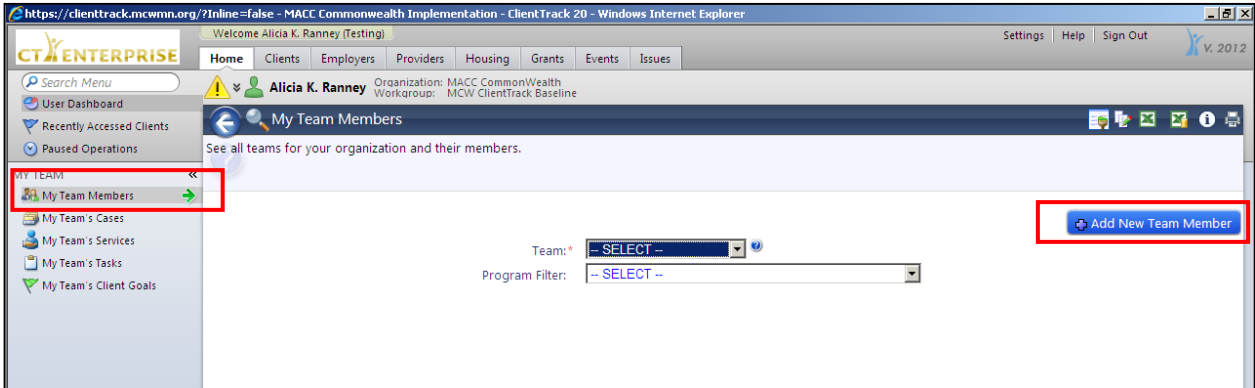


4. Use the blue action arrow to edit the team leader, add new team members or delete a team.
5. To add team members, click on the blue action arrow and select "Members". On the next screen, click on "Add New Team Member" button in the upper right corner of the screen. Use the magnifying glass to search for a new user and click "Save" when done.

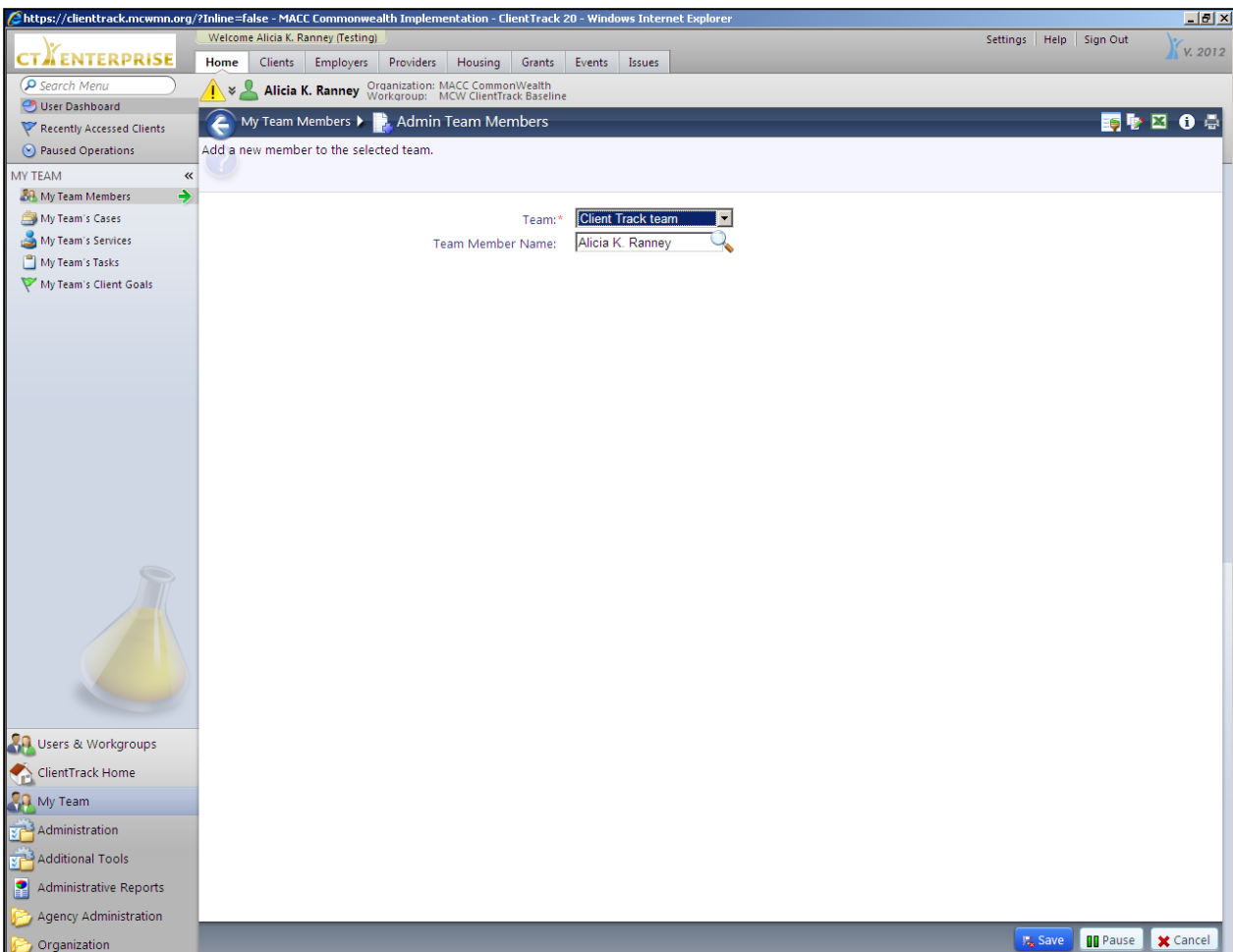


ADDING USER TO AN EXISTING TEAM

1. You can add a user to an existing team from your organizational intake workgroup. From the Home tab, open up My Teams menu and select My Team Members. Then click on Add New Team Members button in the right hand side of the screen.



2. Select a Team for the user, then use the magnifying glass to lookup the user name. Click "Save to finish.



Eliminating Duplicated Client Files

Duplicate client files are most likely to occur when a user does not perform a search prior to adding a new client to the database. However, duplicates are also populated when names are spelled wrong or a client gives a surname or another name not given at the initial intake.

FINDING DUPLICATE CLIENTS:

Searching for Existing Clients

Duplicate clients are most often found when users perform searches for participants and see that two files have been created for the same client. **If you've found a duplicate client please contact your agency administrator.**

Duplicate Client Report

Agency administrators are encouraged to run a duplicate client report at least once per quarter. This report allows administrators to keep the number of duplicate clients in the system to a minimum.

There are two ways to eliminate duplicates:

1. Merging the two duplicate files – allows you to combine information regarding enrollments and services received.
2. Deleting the duplicate file – when a client has a duplicated file but the duplicate file has very limited information (no enrollments or services).

INSTRUCTIONS FOR MERGING CLIENT FILES

1. Before reporting a client file to be merged it's important to understand how a merge works. We will use the two examples below.

Client A: Aimee Smith (ID: 12345)
DOB: 03/15/1980
1234 Apple Street
Enrollments: Employment (enroll date 9/1/12)
Services: Job Support on 9/1/12; 10/1/12

Client B: Amy Smith (ID: 54321)
DOB: 03/15/1980
1234 Apple Street
Enrollments: Food Shelf (enroll date 11/4/12)
Services: Food on 11/4/12

- In the above example, the same client was entered twice into client track. The second time (example in red) the clients name was misspelled. But we can tell by her date of birth and her address that it is the same person. In this case we want to keep the file with the correct name spelling.

When merging files, you are moving information from Client B into Client A. The client identity information will remain for Client A (the client name, client ID and address) the client enrollments, assessments and services will get merged together. So when the above two examples are merged, we will get the following result:

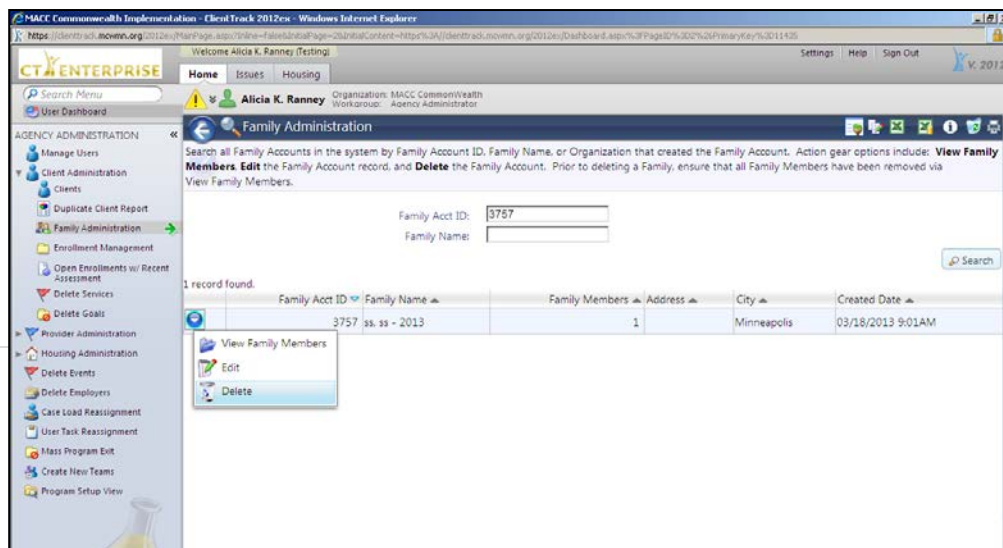
Client A: Aimee Smith (ID: 12345)
 DOB: 03/15/1980
 1234 Apple Street
 Enrollments: Employment (enroll date 9/1/12); **Food Shelf (enroll date 11/4/12)**
 Services: Job Support on 9/1/12; 10/1/12; **Food on 11/4/12**

- To submit a request for merged client, please report the two duplicates to your agency administrator letting them know the client name and Client ID number's for both files and which client ID file you want to keep.

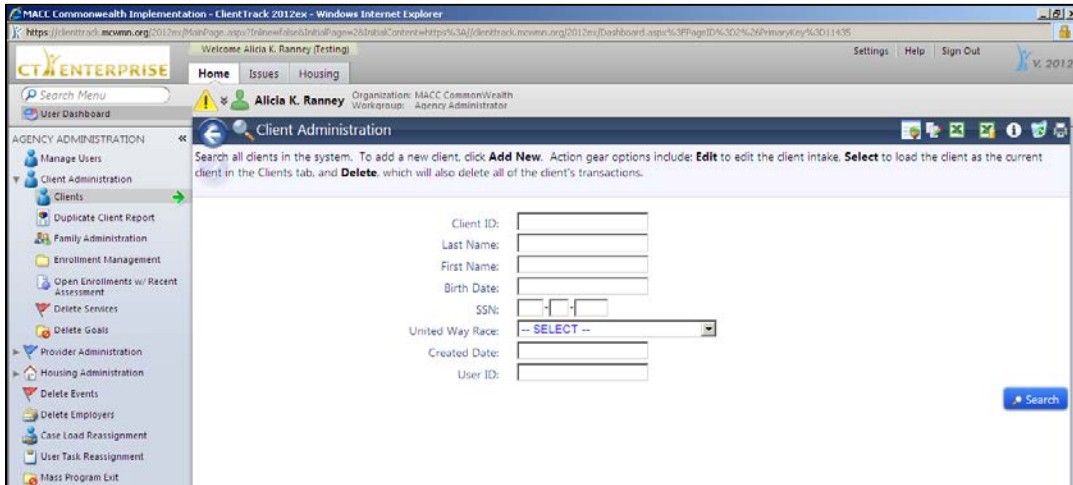
INSTRUCTIONS FOR DELETING DUPLICATE CLIENTS – FOR AGENCY ADMINS ONLY

WARNING: Only delete duplicate clients when the duplicated client file has no unique services or enrollments, case notes, or assessments. If the duplicated client file has only a few unique services and enrollments, you have the option to manually copy the information to the client file you wish to keep and then delete the duplicate file. If a client's duplicated file has many services, enrollments, case notes, or assessments, it is probably best to follow the steps above and merge the two files together.

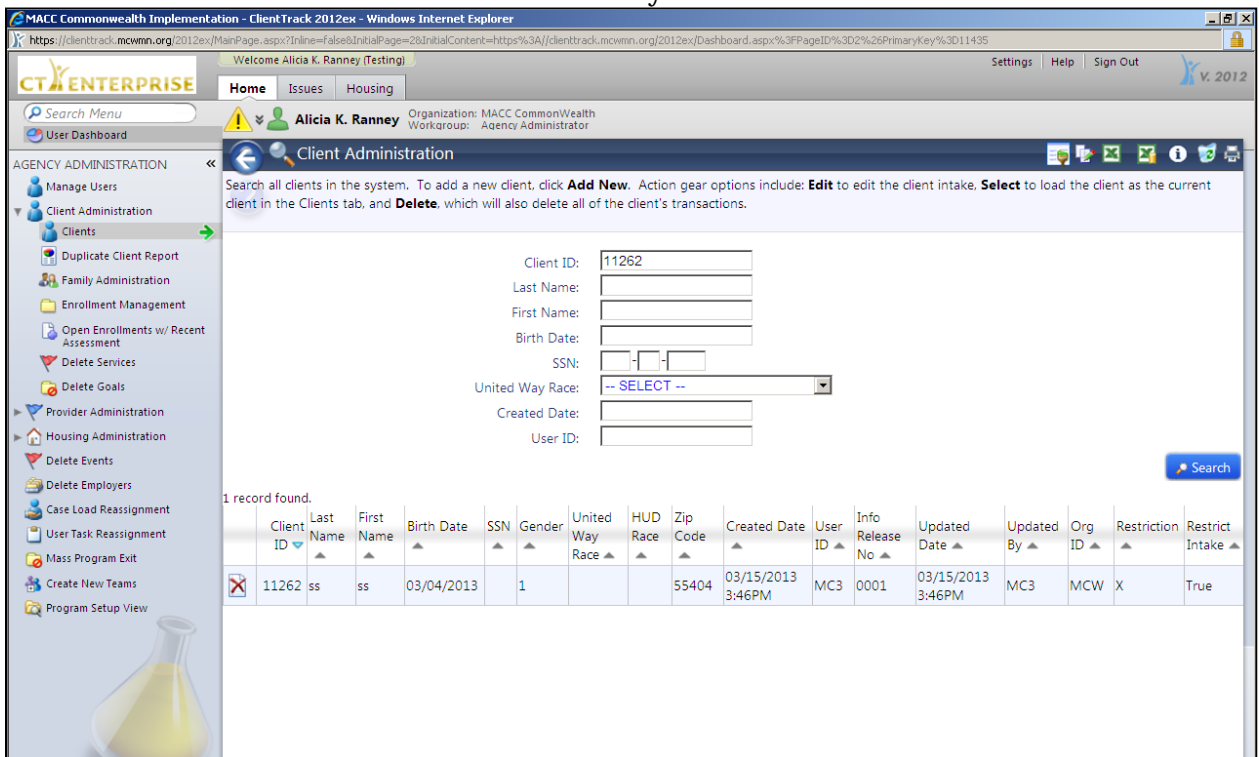
- First you'll want to delete the duplicate client's family from the system. You can find the duplicated client's family ID on the Add/Edit Family Members form or on the client's dashboard (if your agency has chosen a dashboard with the Family ID listed).
- Click on Family Administration and search for the family name by the family ID number. Click on the action gear next to the Family Name and select delete.



- Next you will need to delete the client. In the Agency Administrator's Workgroup, select Client Administration > Clients. Search for the duplicated client file you wish to delete. It is best practices to search by the client ID, so you are sure which file it is you need to delete.



- Click on the delete icon to the left of the client file you want to delete.



- If you are deleting a client file that has duplicate enrollment and either no services or you have manually added the services from the duplicate file you plan to delete to the client's remaining file, be sure to delete those enrollments as well in the Enrollment Management section. Be sure to search by the client ID you have deleted!

Client Track

New Program Request



Basic Program Set-Up Information			
1. Program Name:			
2. Program Type (ie. Violence Prevention, Youth Program, etc.):			
3. Program Description:			
4. Target Population:			
5. Start Date:			
6. Will Case Managers be used (Y/N):			
7. Program Goals/Outcomes:	Goal Description		Active or Mandatory?
8. Program Services (ie. Case Management, Advocacy, Support Group, etc.):	Name of Service	Default # of Units 0, 1, 2, etc.	Unit of Measure Count, Dollars, Hours, Minutes, Pounds)
9. Program Document Check List (if applicable)			
10. Program Public Assistance List (if applicable)			
11. Program Barriers (if applicable)			
Other Program Assessments Needed (ie. Domestic Violence, Financial, Education, etc.)			
a. Enrollment Assessments (Entered when enrolling a client)			
b. General Assessments (Available at any time for program)		Yes or No If yes, please include/attach a document with questions and responses. Please consult MCW for help in creating General Assessments for your program.	
c. Exit Assessments (Entered when exiting a client)			
12. Any special reporting needs for this program? If so, please describe.			