

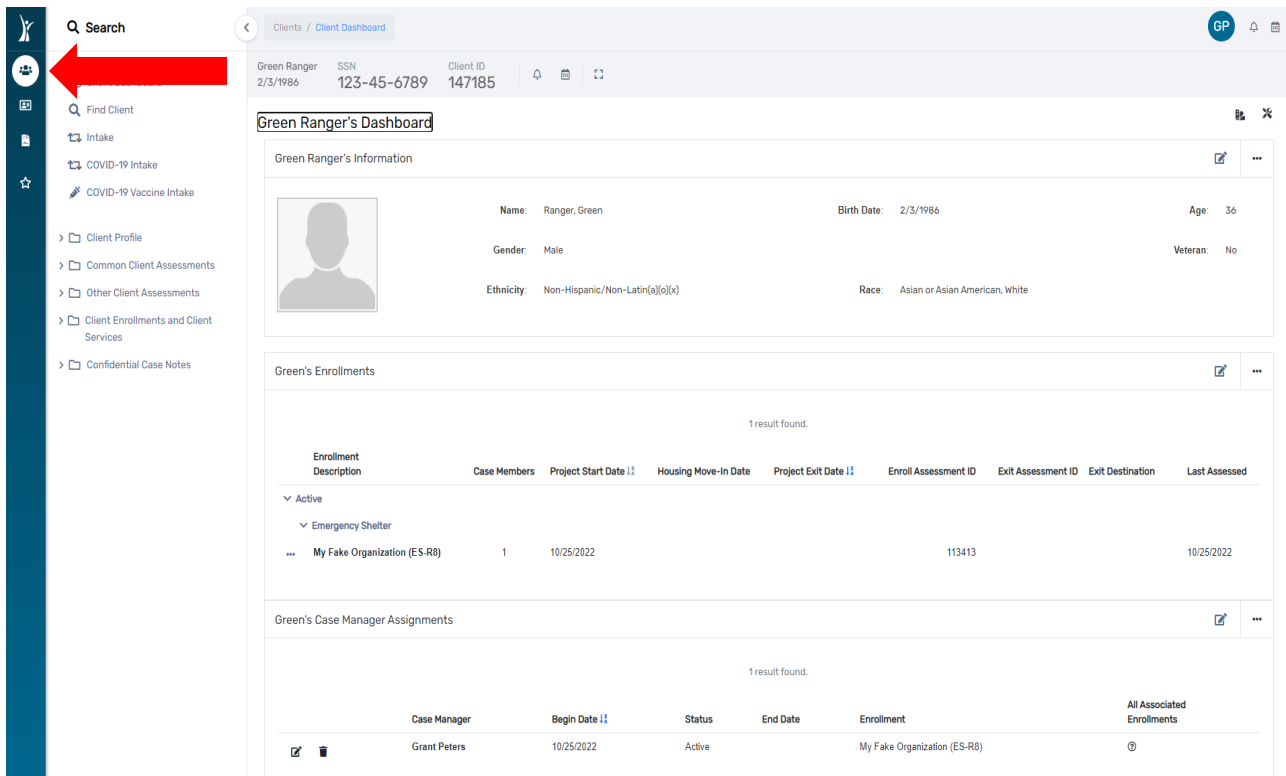
# How to Add a Crisis Call as a Service

Updated September 2023

Using the Services tool to document Crisis Calls will allow your organization to quickly document a call for a client in a critical moment and pull a Service Summary report to review Crisis Call information for any given timeframe.

Follow these steps to document a Crisis Call as a service:

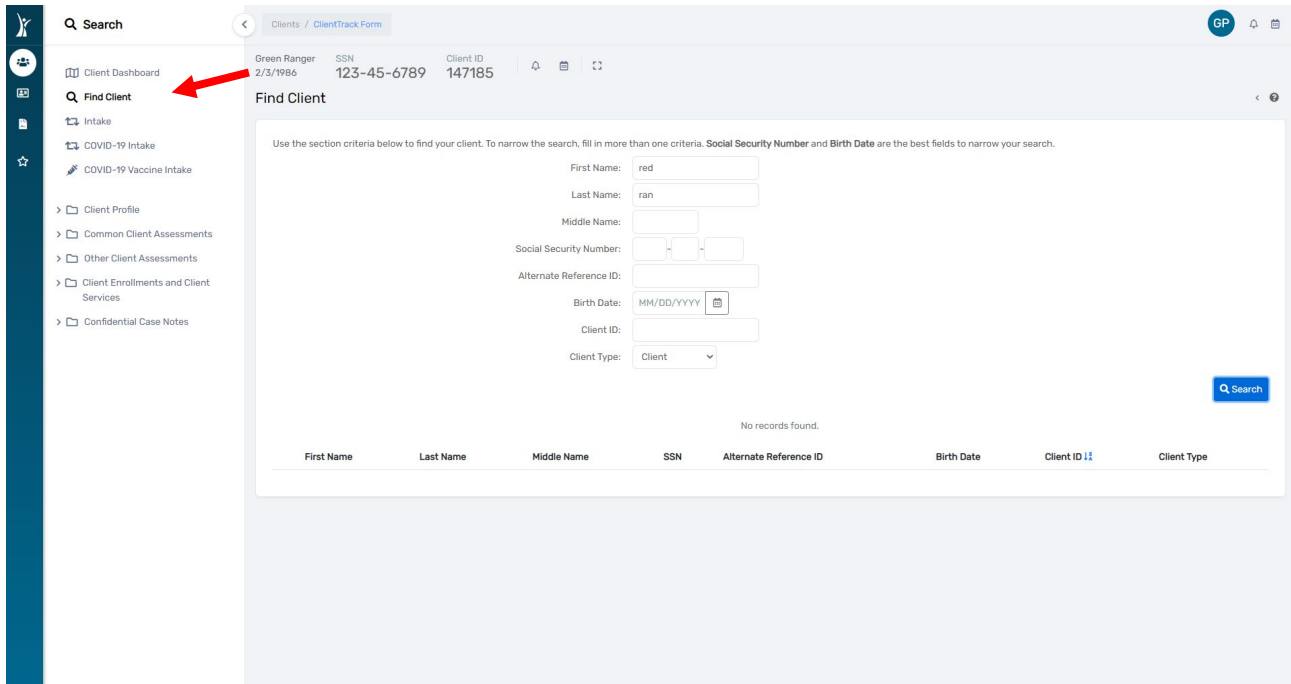
1. Login to DV ClientTrack
2. Choose the **“Clients”** workspace by clicking on the client workspace icon at the top left of your screen (see picture below).



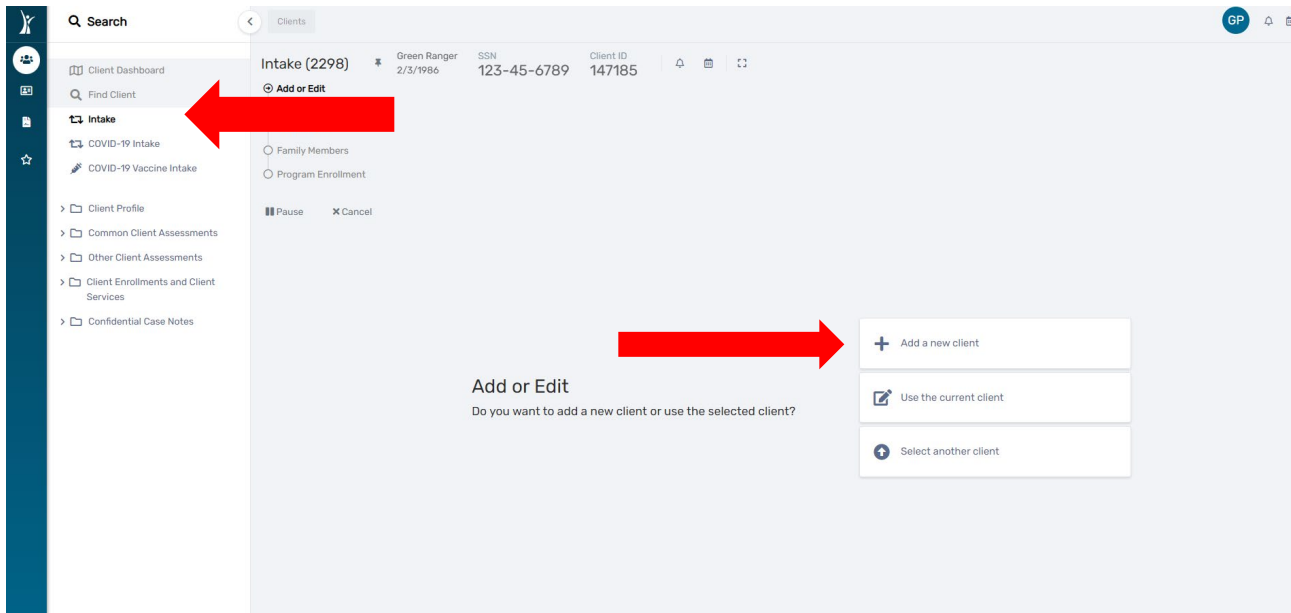
3. Search for the client in the system by clicking on **“Find Client”** (see picture below). If the client is already in the system, the client’s information will appear in the search results list (see picture below). Click on the client’s name to go to the client record.

Please contact the DV Help Desk if you have questions or require additional guidance.

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4. If the client is NOT in the system, you will need to create an intake by clicking on “Intake” (see picture below). You will notice that without entering required information in the workflow, you will not be able to “Add Crisis Call Client” (see picture below).



If you don't have some basic client information you should choose “Data Not Collected” and plan to update the information as you obtain it. Use the “**Edit Client**” link in the “**Client Profile**” section to the left of the client record to update any basic client information.

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Client Dashboard

Red Ranger SSN 111-11-1111 Client ID 147187

### Red Ranger's Dashboard

#### Red Ranger's Information

Name: Ranger, Red Birth Date: 1/1/1986

Gender: Male

Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x) Race: Black, African Americ

#### Red's Enrollments

No records found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID
No records found.					

#### Red's Case Manager Assignments

No records found.

Case Manager	Begin Date	Status	End Date	Enrollment
No records found.				

- For Anonymous clients, please search for the client we set up for your organization called Anonymous (first name) "Your Organization name" (last name) (see picture below).

Client Dashboard

Red Ranger SSN 111-11-1111 Client ID 147187

### Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.

First Name: anonymous

Last Name: myfakeorg

Middle Name:

Social Security Number:

Alternate Reference ID:

Birth Date: MM/DD/YYYY

Client ID:

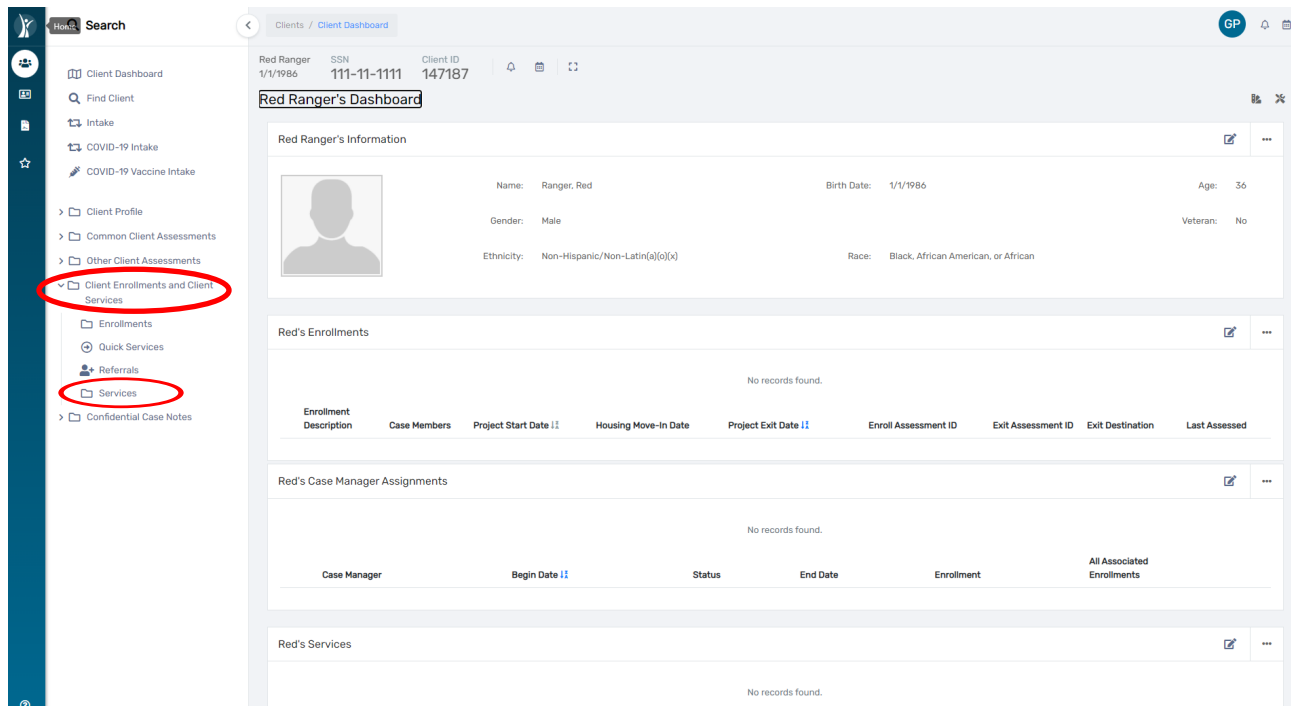
Client Type: Client

No records found.

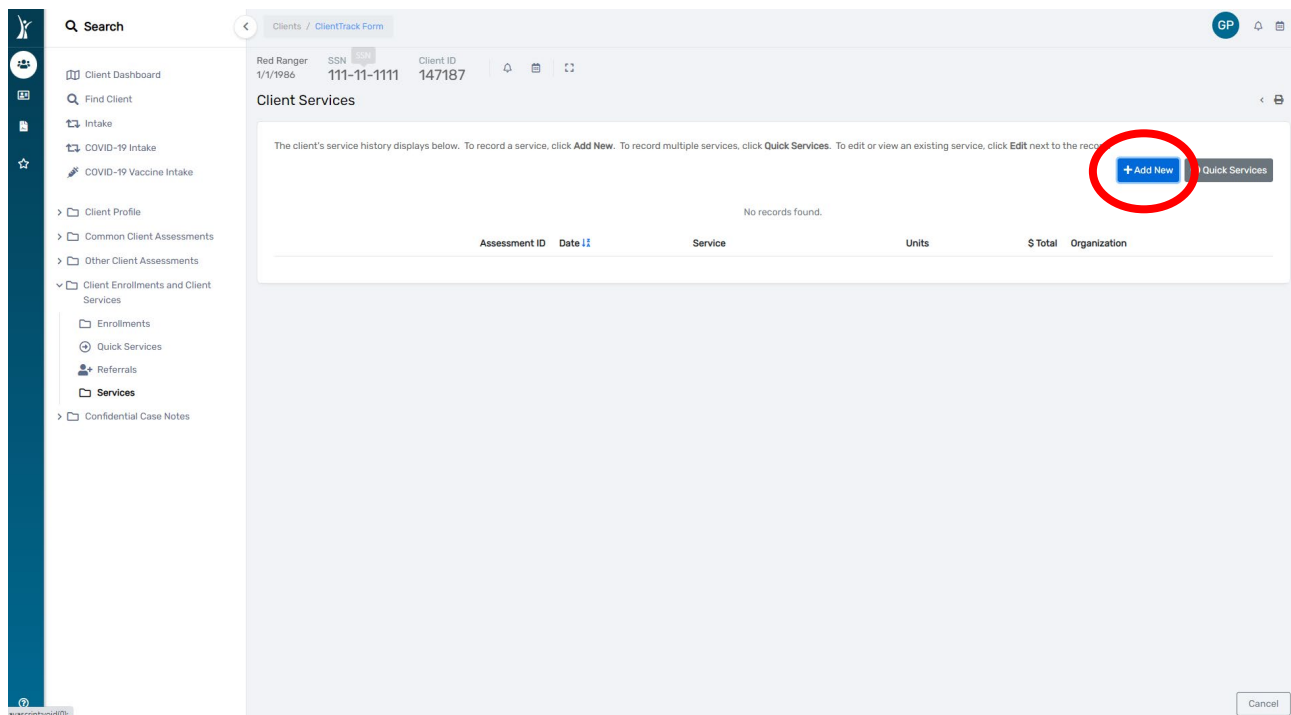
First Name	Last Name	Middle Name	SSN	Alternate Reference ID	Birth Date	Client ID	Client Type
No records found.							

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- Once you select your client, click on **“Client Enrollments and Client Services”**, and then click on **“Services”** on the drop-down menu as shown in the picture below.



- Click on the **“+ Add New”** button to create a new service for the Crisis Call.



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8. Select the “Grant” first by choosing “Crisis Call” in the drop-down list. The requirement for selecting an “Enrollment” will go away once you’ve selected “Crisis Call” for “Grant.”

The screenshot shows the 'Service' form in the ClientTrack system. The 'Grant' dropdown menu is highlighted with a red circle and set to 'Crisis Call'. Other fields include Family Income (No Recent Income), Family Members (1), Poverty Level (\$1132.50), Date (10/26/2022), Units (1.00), Unit Value (\$1.00), Total (\$1.00), and User Performing the Service (Grant Peters). The 'Enrollment' dropdown is set to '-- SELECT --'. The 'Location' dropdown is also set to '-- SELECT --'. There are 'Save' and 'Cancel' buttons at the bottom right.

9. Select the “Service” by choosing “Crisis Call” in the drop-down list. Additional fields will appear after making this selection (see picture below). Change the date and time of the call if needed and complete the information as required.

The screenshot shows the 'Service' form in the ClientTrack system. The 'Service' dropdown menu is highlighted with a red circle and set to 'Crisis Call'. Additional fields like 'Date' (10/26/2022), 'Units' (1.00), 'Unit Value' (\$0.00), 'Total' (\$0.00), and 'User Performing the Service' (Grant Peters) are visible. The 'Enrollment' dropdown is set to '-- SELECT --'. The 'Location' dropdown is also set to '-- SELECT --'. There are 'Save' and 'Cancel' buttons at the bottom right. Below the main form is a section for 'Crisis Call Information' with fields for 'Call Date/Time' (10/26/2022 AM), 'Call Type' (Crime/Victimization, Information/Other, Hangup/Prank), '911 Needed' (dropdown), and 'Description'.

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10. For **“Victimization Type”** you will be able to choose **“homeless”, “stalking”, “DV”, or “sexual assault”**. For **“Shelter Provided”**, if you select **“No”** another box will open, and you can choose one of the denial reasons shown in the picture below. Complete the required fields. When finished, click **“Save.”**

The screenshot displays the 'ClientTrack Form' interface for a client named 'Red Ranger' (SSN: 111-11-1111, Client ID: 147187). The 'Service' section is active, showing 'Unit Value' and 'Total' both at \$0.00, and 'User Performing the Service' as 'Grant Peters'. The 'Crisis Call Information' section is highlighted with a red circle and contains the following fields:

- Call Date/Time: 10/26/2022 AM
- Call Type:  Crime/Victimization,  Information/Other,  Hangup/Prank
- 911 Needed: No
- Description: [Text input field]
- Are you safe?: Yes
- Are you injured?: No
- Is abuser present?: No
- Victimization type: Stalking
- Safety Planning Provided?: Yes
- Shelter Needed?: Client Refused

A red arrow points to the 'Save' button at the bottom right of the form.

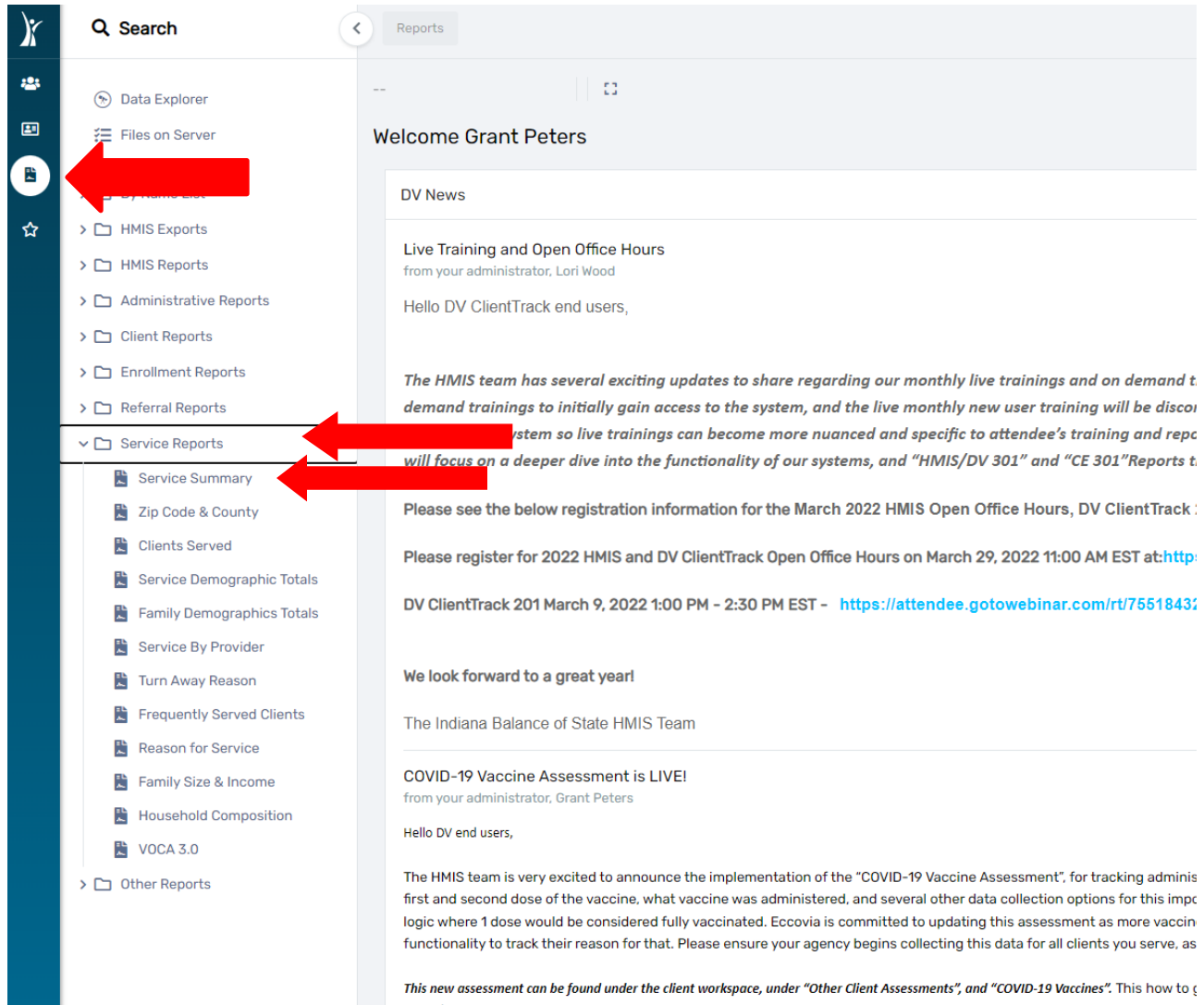
### Service Summary Reports

Your organization can run a **“Service Summary”** report to review Crisis Call information for your clients. This can be found under the **“Reports”** workspace. To access the **“Reports”** workspace, click on the icon with arrows at the top of your screen and then select the **“Reports”** option as shown in the picture below.

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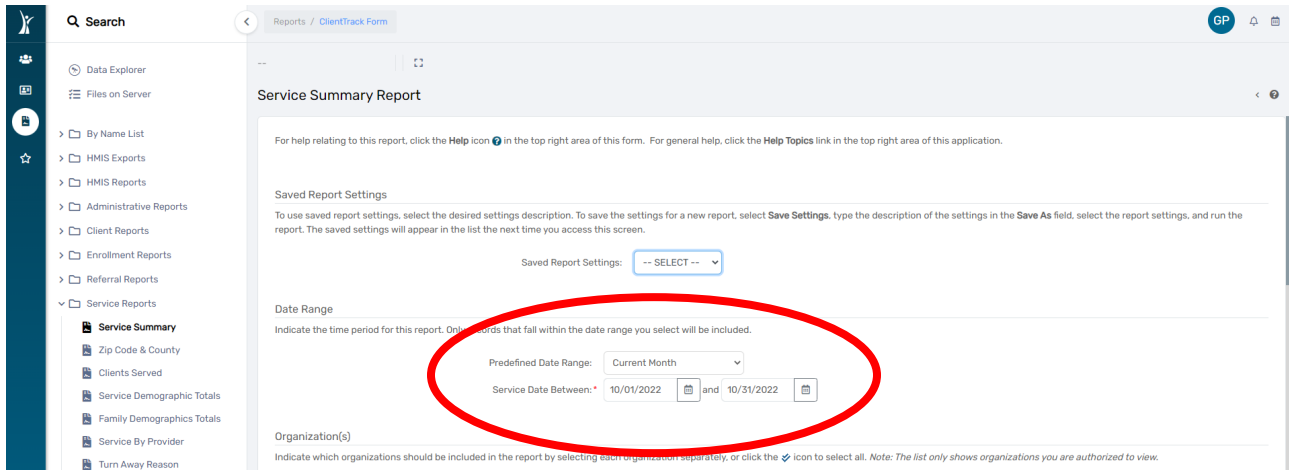
Follow these steps to run a Service Summary Report for Crisis Calls:

1. Click on the “Reports” workspace, “Service Reports” folder, and then click on “Service Summary” in the new drop- down menu.

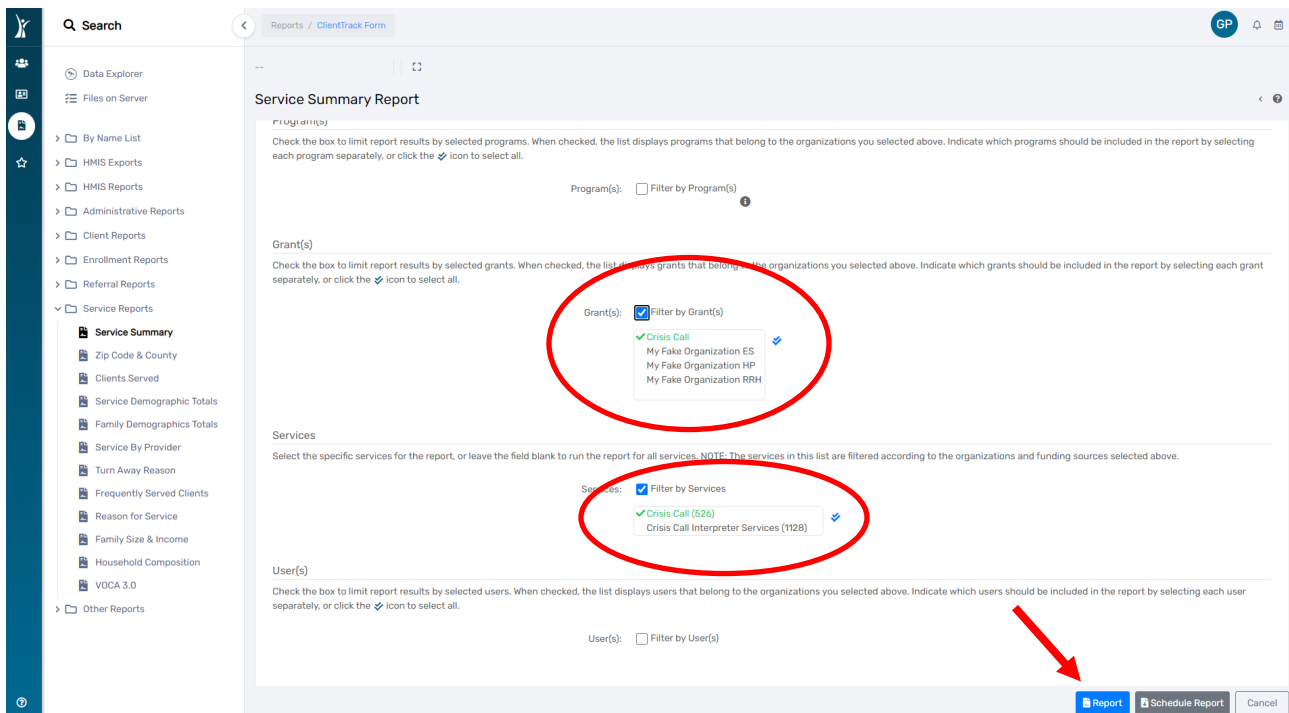


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2. Set up your report parameters: Define your “Date Range” with the date fields provided



3. Scroll down and filter by “Grant” and “Services”, check the check boxes. A drop-down list will show, select “Crisis Call” for “Grant” and “Service”. You should see a blue check mark appear beside it when it is selected. Click “Report” to run the Service Summary report for Crisis Calls (See picture below).



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4. You can click on the link in the report window for “Crisis Calls” to review client level information. You can also export the report to a pdf file or Excel spreadsheet by clicking on the little blue disc at the top of the report window and selecting the desired file type.

The screenshot displays the 'Service Summary Report' window. At the top, there is a toolbar with various navigation and action icons. A red circle highlights a blue disc icon with a dropdown arrow, which has opened a menu with the following options: Excel, Excel Data, PDF, and Word. Below the toolbar, the report content is visible, including the title 'Service Summary', the date range '10/1/2022 to 10/31/2022', and the 'Report Criteria' section. The 'Report Criteria' section lists: Organizations: My Fake Organization, Grants: Crisis Call, and Services: Crisis Call (526). The ClientTrack logo is positioned on the right side of the report area.

Service Summary Report

Service Summary  
10/1/2022 to 10/31/2022

Report Criteria:  
Organizations: My Fake Organization  
Grants: Crisis Call  
Services: Crisis Call (526)

ClientTrack™

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