

## Client Service Tracker

### Detailed Version Comparison of Data Fields

Note: Some data fields in Version 8 were not used by many organizations, so they were removed in Version 9. If your organization gets Version 9 Full and Modifiable, then any Microsoft Access expert can add new fields, including fields from Version 8 that were left out of Version 9.

<i>Version 8</i>	<i>Version 9</i>
<b><i>Person Window</i></b>	<b><i>Household Window</i></b>
Address Line 1	Street Address
Address Line 2	
City	City
State	State or Province
Zip Code	Zip or Postal Code
County	County
Home Phone	Landline Phone
	Household Note
	<b><i>Person Window</i></b>
First Name	First Name
Middle Name	Middle Name
Last Name	Last Name
Name Suffix	Name Suffix
	Relationship to Primary Household Contact
Client Status	
Social Security Number	Identification Number
Second ID Number	
Alternative Phone	Mobile Phone
	Email Address
Date of Birth	Date of Birth
Age [displays based upon Date of Birth]	Age [displays based upon Date of Birth]

Client Service Tracker Detailed Version Comparison of Data Fields

<b>Version 8</b>	<b>Version 9</b>
Is Minor	[Minor status displays based upon Date of Birth]
Gender	Gender
Race	Race
Ethnic Group	
Marital Status	Marital or Relationship Status
Citizenship	
Military Status	Military Status
Education Status	Education Status
Vocational Certification	
Occupational License	
Ability to Work	
Usual Occupation Type	
Employment Status	
Primary Employer Company Name	
Primary Employer Contact Person	
Primary Employer Phone	
Average monthly Gross Income	
Average Monthly Take Home Pay	
Public Assistance Status	
Living Arrangement	
Shelter Type	
Number of Adults in Household	[Reports calculate num. of Adults in Household]
Number of Minors in Household	[Reports calculate num. of Minors in Household]
Primary Transportation Mode	
Justice System Involvement	
Overall Medical Condition	
Diagnoses	
Primary Health Care Provider	
Health Care Insurer	
Is Physically Impaired	
Is Mentally or Emotionally Impaired	

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<b>Version 8</b>	<b>Version 9</b>
Is Disabled	
Emergency Contact Name	
Contact's Relationship to Client	
Emergency Contact Address	
Emergency Contact City	
Emergency Contact State	
Emergency Contact Phone	
Referral Source Type	
Referral In Source Type	
	Referring Organization
Referral In Name	Referral Source Name and Phone
Presenting Problem	Presenting Problem
Support Plan Due Date	
	Person Note
<b>Case Notes Window</b>	<b>Case Notes Window</b>
Case Note Date	Note Date
Entered By	Worker
Case Note Text	Case Note Text
<b>Services Window</b>	<b>Service Events Window</b>
Service Date	Event Date
Providing Worker (Initls)	Worker
Program Code	Program
Service Code	Service
Quantity	Quantity
Unit of Measure [defaults by Service Code chosen]	Unit of Measure [set by Service chosen]
	Service Event Note
	<b>Service Periods Window</b>
	Svc Period Start Date
	Svc Period End Date
	Program

Client Service Tracker Detailed Version Comparison of Data Fields

<b>Version 8</b>	<b>Version 9</b>
	Service
	Quantity
	Unit of Measure [set by Service chosen]
	Worker
	Service Period Note
	<b>Outcomes Window</b>
	Outcome Date
	Indicator
	Indicator Result
	Worker
	Outcome Note
	<b>Reminders Window</b>
	Date to be Reminded
	Reminder Note
	Worker

Note: You must have Microsoft Access and Microsoft Excel on your computer for Client Service Tracker to work. See the website at [www.socialworksoftware.com](http://www.socialworksoftware.com) for information on what versions of Access and Excel are needed.