



HMIS USER MANUAL

AN INSTRUCTIONAL GUIDE ON HOW TO USE THE HOMELESS MANAGEMENT INFORMATION SYSTEM (HMIS), A WEB-BASED CASE MANAGEMENT SYSTEM

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OBJECTIVES

Thank you for using ClientTrack as your Homeless Management Information System (HMIS). HMIS is an electronic data collection system storing longitudinal client-level information about persons who access a variety of services for homeless prevention and/or rapid re-housing. HMIS is a valuable resource from the participating homeless assistance and homeless prevention programs in a Continuum of Care (CoC). Aggregate data can be used to understand the size, characteristics and needs of the population at the local, state, and national levels. HMIS provides information about client needs, goals, and service outcomes.

The content in this user manual will provide information on all the basic features of ClientTrack and detailed guidance on your day-to-day data entry, as well as helpful case management tools to optimize your services and time. We believe you will find this web-based case management system easy to use and essential in sharing your impact.

In this manual you will find the following information:

CONTACTS

- HMIS Team Member list and contact information
- HMIS help desk information

SECURITY POLICIES & PROCEDURES

- Implied Consent Policy
- Computer storage
- Username and password

OVERVIEW OF CLIENTTRACK FEATURES

- User dashboard
- Client dashboard
- Case management tools
- Household members

MANAGEMENT OF CLIENT INFORMATION AND PROGRAM ENROLLMENTS

- Intake workflow
- Services
- Case notes
- Update/Annual Assessment
- Exit workflow
- Managing providers

BASIC REPORTS

- Service Summary
- Annual Performance Report (APR)
- CAPER
- HMIS Universal Data Quality Report

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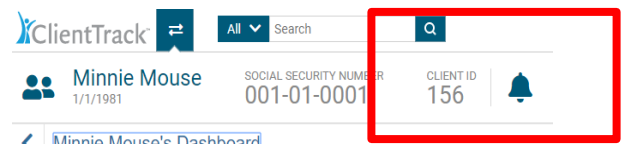
Dboltz@ihcda.in.gov

HMIS HELP DESK

If you encounter any issues with ClientTrack at any time, please contact the help desk with the email address below.

Please do not send any identifying information for clients

when emailing the help desk. There is a unique client ID number assigned to each client record in the system. This number is found at the top of the client record to the right of the client's name and date of birth as seen outlined by the red box. **Please use ONLY the client ID number when emailing the help desk if applicable.**



HMIS Help Desk: HMISHelpDesk@ihcda.IN.gov

CLIENTTRACK ACCESS

You can access HMIS with the following link:

<https://www.clienttrack.net/IndianaHMIS>

HMIS Balance of State ClientTrack

SECURITY POLICIES & PROCEDURES

Personal Protected Information (PPI) is considered any information that could lead to individual identification. Agencies participating in HMIS should have procedures in place for the secure storage and disposal of hardcopy and electronic data generated from ClientTrack or created for entry into ClientTrack. PPI should be stored in locked drawers/file cabinets and hardcopy data should be shredded before disposal. Electronic PPI including data contained on disks, CD's, jump drives, computer hard drives, and/or other media should be reformatted before disposal.

PRIVACY AND CLIENT INFORMATION RESTRICTIONS

The Notice of Privacy Practices, including the purpose for data collection, should be posted in a public area and in an office where an intake professional meets with clients. The full privacy policy notice should be posted on the web sites of agencies, as well as made available to clients who request it. The document is called "HMIS Notice of Privacy Practices" and "HMIS Statement of Privacy Practices" and can be downloaded from the IHCD website at: <https://www.in.gov/ihcda/indiana-balance-of-state-continuum-of-care/>

A signed client consent form is not currently required. A client, who presents to your agency for services and provides information, is giving implied consent to enter and share certain data in ClientTrack. Data collection and data sharing are topics that should be discussed with the client at the time of intake. Some program enrollments (and information related to those enrollments) are restricted and only the enrolling organization (HOPWA, PATH, RHY) will have access to those records. ***No person is to be refused services regardless of their participation in ClientTrack.*** You can find Indiana's Balance of State (BOS) security plan on the website, as well as other helpful forms and resources: <https://www.in.gov/ihcda/indiana-balance-of-state-continuum-of-care/>

CLIENTTRACK COMPUTERS

All computers used to access ClientTrack should be situated in secure locations. ClientTrack computers in publicly accessible areas should always be staffed and not viewable by other individuals. All computers should be password protected, and the password you use to log onto your computer should NOT be the same password as your ClientTrack password, but rather a password to prevent access to the computer itself.

ClientTrack usernames and passwords are NOT to be shared with other users. Users should not keep username/password information in a public location (i.e., sticky notes on monitors or filed under HMIS or Password in a Rolodex). Passwords should never be saved to your browser. ClientTrack security policies require the use of strict passwords. Passwords must have:

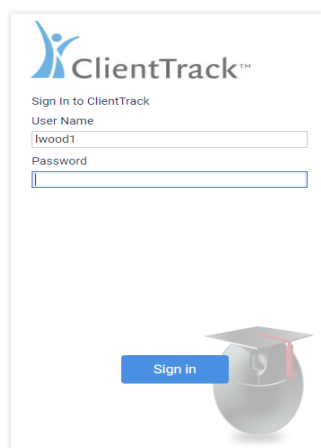
- At least one number
- Between 8 and 12 characters
- At least one non-letter, non-numeric character (!#@\$)
- At least one capital letter

New passwords will be required upon first login. **Accounts are automatically deactivated after 30 days of inactivity for security purposes.** You will be required to change your password every 90 days for security purposes. If you need assistance with your username and password, contact the Help Desk by emailing HMISHelpDesk@ihcda.IN.gov and IHCD staff will assist you.

LOGGING INTO THE SYSTEM

ClientTrack is a web-based application, and you will need to use an internet browser to access it. ClientTrack works with Google Chrome, Mobile Safari and Mozilla's Firefox. Some older versions of these web browsers can cause unique issues in ClientTrack. We recommend that you work with your IT personnel to ensure you have the newest version of your web browser.

Open your web browser and go to <https://www.clienttrack.net/IndianaHMIS> Enter your assigned "Username" and "Password" and click "Sign In." **Remember, sharing your username and password is not permitted. Passwords are case sensitive and pop-up blockers must be turned off to access the application. You may need to change your settings to allow for pop-ups from this site.**



The login screen features the ClientTrack logo at the top left. Below it, the text "Sign In to ClientTrack" is displayed. There are two input fields: "User Name" with the text "lwood1" and "Password" which is empty. A blue "Sign in" button is located at the bottom right of the form area. A graduation cap icon is positioned to the right of the button.

What's New

NHSDC Oct 2019
9/30/2019

Eccovia Solutions is excited to attend the National Human Services Data Consortium (NHSDC) Fall Conference, October 15-17, 2019 in Austin, TX. This year's conference will be focusing on preventing and ending homelessness and impacting community systems of care with data. Conference attendees will hear inspiring examples of communities who have successfully used data to transform [...] The post NHSDC Oct 2019 appeared first on Eccovia Solutions.

Florida Coalition for the Homeless
9/30/2019

Eccovia Solutions is proud to support the Florida Coalition for the Homeless 2019 Annual Conference Starting Oct 9th, 2019. The conference brings together national, state and local experts from the fields of homelessness, affordable housing, veteran services, healthcare, mental health, and workforce development to explore current best practices on ending homelessness. CoCs across Florida and [...] The post Florida Coalition for the Homeless appeared first on Eccovia Solutions.

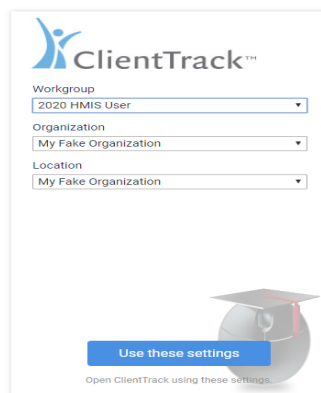
Eccovia Solutions Rolls Out PRAPARE SDoH Screening Tool on its Care Coordination Platform
9/16/2019

September 16, 2019 09:00 AM Eastern Daylight Time SALT LAKE CITY-(BUSINESS WIRE)-Eccovia Solutions, the leading provider of flexible, cloud-based case management and community care coordination software for health and human services organizations, today announced the infusion of the PRAPARE SDoH (social determinants of health) capability into the ClientTrack platform. The PRAPARE SDoH screening tool incorporates [...] The post Eccovia Solutions Rolls Out PRAPARE SDoH Screening Tool on its Care Coordination Platform appeared first on Eccovia Solutions.

Your organization may participate in one or more of the three workgroups called "2020 HMIS User", "2020 RHY User" or "2020 Coordinated Entry." Be sure to select the appropriate workgroup when logging in as it makes a difference for which programs you can manage. Also make sure your organization and location are selected appropriately. Click on "Use These Settings" to continue. You will be required to "Accept" the Terms of Agreement when you log into the system for the first time.

USER DASHBOARD

You will be directed to your **User Dashboard** on the "Home" screen and notified of any important "HMIS News"



The user dashboard shows the ClientTrack logo at the top left. Below it, there are three dropdown menus: "Workgroup" with "2020 HMIS User" selected, "Organization" with "My Fake Organization" selected, and "Location" with "My Fake Organization" selected. A blue "Use these settings" button is at the bottom right of the form area. A graduation cap icon is positioned to the right of the button. Below the button, the text "Open ClientTrack using these settings." is displayed.

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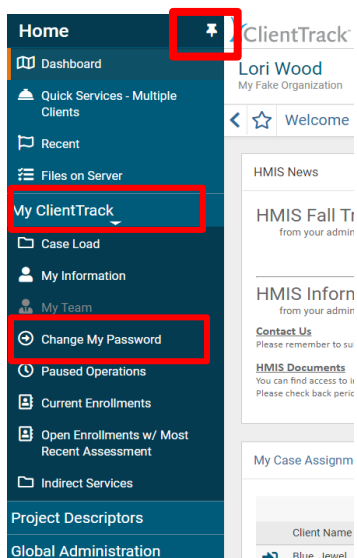
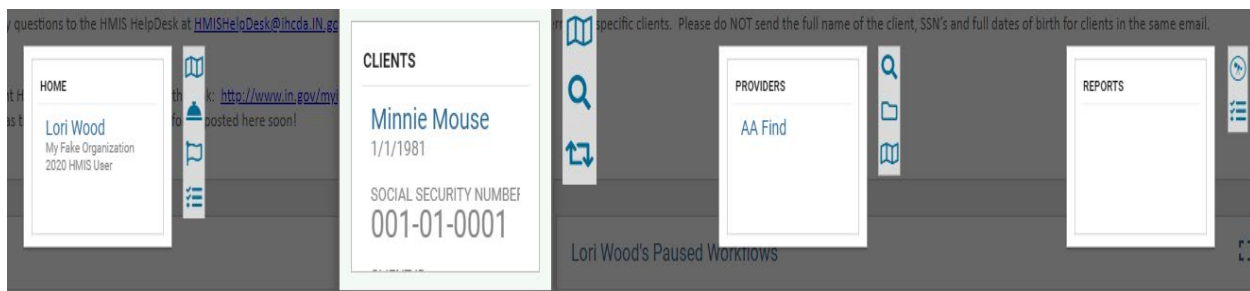
items IHCD wishes to communicate (i.e., upcoming trainings, changes etc.). This is the first screen you come to after logging into the system.

OVERVIEW OF CLIENTTRACK FEATURES

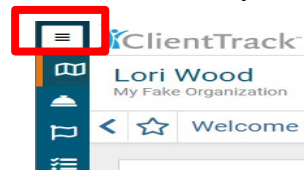
You can access all four dashboards, **“Home,” “Clients,” “Providers,”** and **“Reports”** which provide different features for managing your cases, by clicking on the link with white arrows beside the ClientTrack logo outlined with the red box below.



After clicking on that icon, you will see the four boxes appear labeled, **“Home,” “Clients,” “Providers,”** and **“Reports”** and you can toggle between them by clicking on the appropriate box to take you to that section of ClientTrack as seen below.



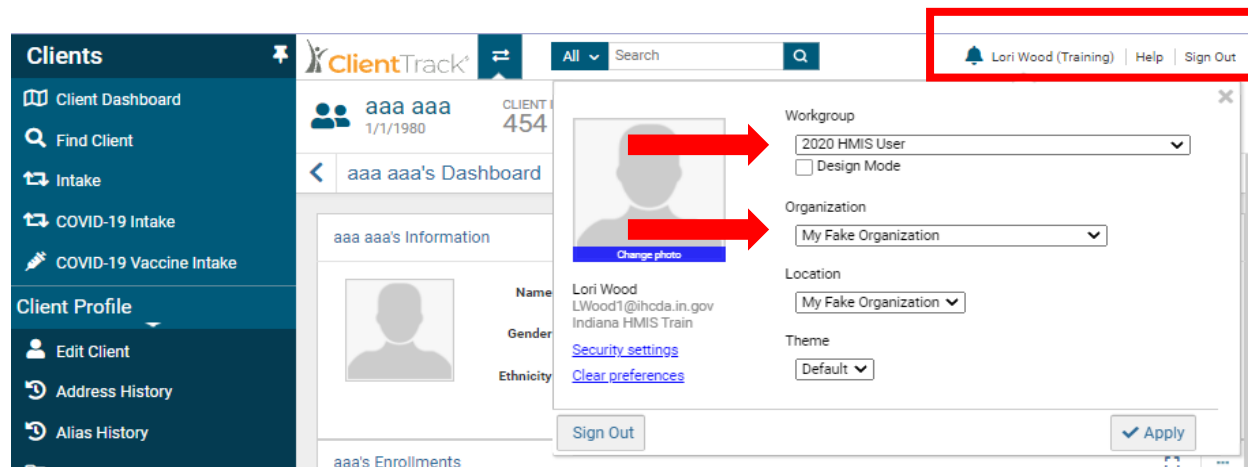
On the **“Home”** screen there is also a list of **Menu Items** that give you easy access to your current case assignments, case notes, and more under **“My ClientTrack.”** When you first log into the system, you may want to **“Pin”** the menu on the left side of the screen to leave that tool bar open. To **“Pin”** the menu, click on the box with three lines highlighted in red as seen to the right here. Once the Menu is visible, click on the push pin to keep the menu open. This is the same process when using the Client Dashboard.



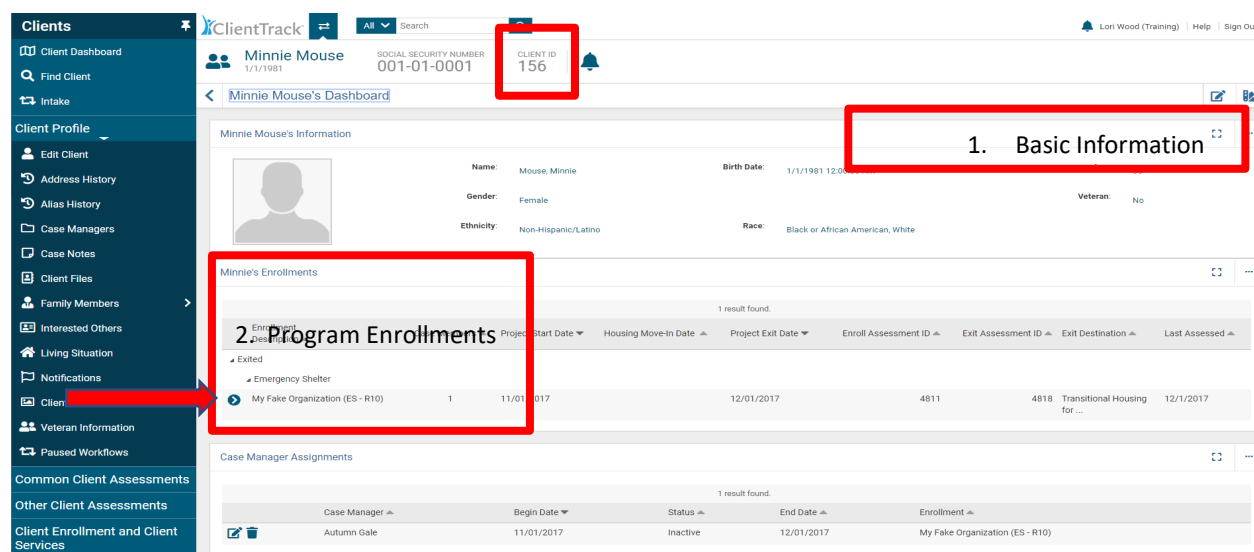
You can also change your password with the **“Change My Password”** link by clicking on **“My ClientTrack.”** All these tools are designed to maximize your time and grant you easy access to your cases.

CLIENT DASHBOARD

If you have access to more than one workgroup, you can use the link with your name in the upper right-hand corner of the screen as outlined above to toggle between the workgroups without logging out. The **“Sign Out”** link is in this same location as well. **Please be sure to “Sign Out” any time you leave the database to ensure security of client data.**



The Client Dashboard is divided up into sections with case management tools on the left-hand side of the record to help you easily find client information and manage program enrollments, services, case notes, and more. Here is a review of the client record:



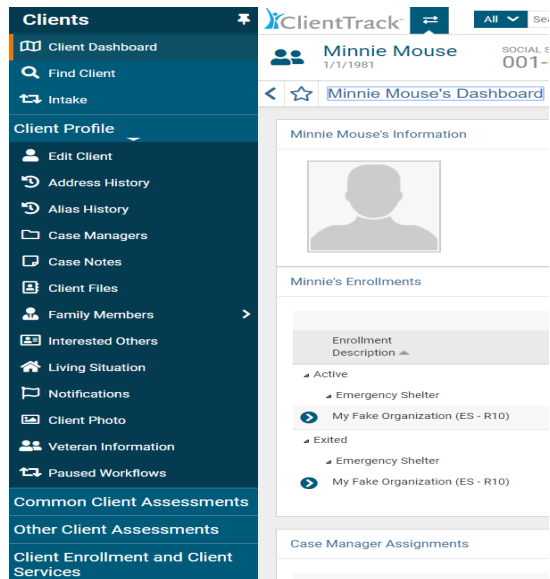
1. At the very top of the client dashboard, you will see the **client’s “Basic Information”** and demographics. You can find the **client ID number** at the top of the client record, which is automatically assigned to the record when created.
2. In the center of the client dashboard, you will see all the client’s past and present **program enrollments**. There is a blue action wheel you can click on to easily manage your program enrollment. When you click on the blue action wheel, a drop-down list will appear where you can use these tools:
 - **Add Household Member** – Use this feature if a new household member needs to be added to the household and enrolled after an enrollment has already been established, i.e., a new baby

is born and needs to be enrolled with Mom. Make sure you're on the head of household's client record when adding a family member to the enrollment.

- **View Case Members** – View all case members associated with the specific program enrollment.
 - **Exit the Enrollment** – To exit a client, select “Exit the Enrollment” and you will be prompted through the exit workflow for the client and all household members if applicable. If you need to only exit one household member, go to the specific household member's client record, and conduct the exit workflow without exiting the household.
 - **Edit Enrollment** - Use this feature to edit the “Start Date” of the enrollment. You can also add Family Members by clicking on the “Family Member” button. “Exit Enrollment” is also available by clicking on the “Exit Enrollment” button
 - **Edit Project Entry Workflow** – Use this feature to edit or identify incorrect or missing information from the client's Project Entry (a check mark appears by each assessment type noting the assessment is complete)
 - **Review Entry Assessments** – Use this feature to review and/or make changes to Entry workflow
 - **Missed Annual/Update Assessment** – Use the Update/Annual Assessment to conduct annual assessments or capture changes to a client's status since enrollment.
 - **Review Entry/Exit Assessments** – You can review the assessments completed at entry and exit with this feature without going through the workflow. This is helpful in completing missing data that was not captured at those points in time.
3. **Case Manager Assignments** are located below the enrollments section of the client record. You can manage case assignments here by clicking on “[Client Profile] Case Managers” or clicking on the little pencil beside the case manager's name. Clicking on the **recycle bin** beside a case manager's name will delete the case manager from the client record. By clicking on the case manager assignments link, you will be taken to a screen where you can edit the status of a case manager for a specific program enrollment or add new case managers to the client record.
 4. **Services** associated with a specific program enrollment will be listed at the bottom of the client record. You can manage your client services by clicking on “Client Enrollment and Client Services” in the list of case management tools on the left-hand side of the client record or by clicking “[Client Name] Services” above the list of services on the client record. Documenting services is discussed in detail starting on page 25 of this manual.

CASE MANAGEMENT TOOLS

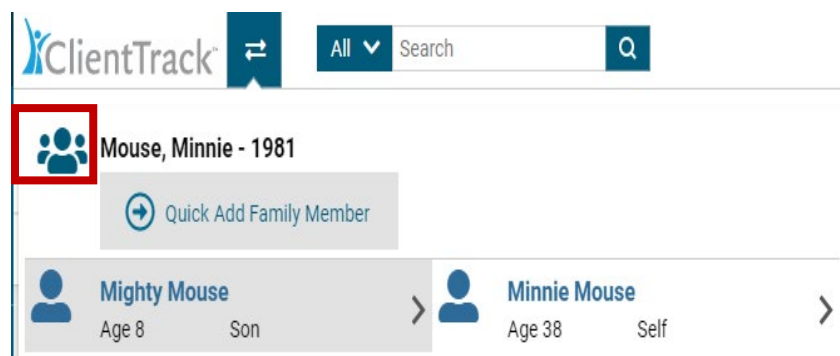
- On the **Client Dashboard** you will find a list of Case Management Tools by clicking on “**Client Profile**” on the left-hand side of the client record. The following information outlines the features and tools found on the client record, and to access some of these features, you must click on the heading located on the left-hand side of the client record to cause another list of tools to appear as seen



below:

- Client Dashboard** – The overview of the client record as seen on page (8). Click on this link to return to the client record from any screen.
- Find Client** – To search for a client in the system by first and last name, date of birth, social security number, client ID number, etc.
- Intake** – To enroll a client in your program.
- Client Profile** – Click on this function to access numerous features for Case Management
 - Edit Client** – To edit basic client information like address, date of birth, social security number, disabling condition, veteran status, etc. There are more helpful tools under “Edit Client” that are available for you to use depending on your agency’s needs and requirements.
- Case Notes** – To create and review case notes.
- Family Members** – To review household members.
- Client Photo** – this feature allows you to upload a photo to the client’s file
- Veteran Information** – Allows you to collect and enter data about the veteran’s service
- Paused Workflows** – To resume a workflow you previously paused.

HOUSEHOLD MEMBERS



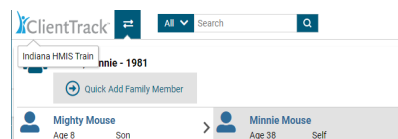
You can view household members and their client records by clicking on the **family icon** at the top of the client record beside the client’s name. A drop-down window will appear with all the current household members. You can click on the names of the household members in the drop-down window to go directly to his/her client record. You can also use the “**Quick Add Family Member**” link in this window to add new household members. **Please note that you will be able to add household members during an Intake workflow as well.** You may also add a

family member to an existing enrollment with the **“Add Household Member”** feature (described on page 8) listed when you click on the blue action wheel beside your program enrollment.

NOTIFICATIONS

ClientTrack features a **“Notifications”** tool on the client record allowing you to set up alerts specific to the client, like reoccurring appointments, required documentation, client deadlines, etc. The Notifications tool is located to the right of the client’s name and client ID number at the very top of the client dashboard. To add a new notification, click on the bell and a new

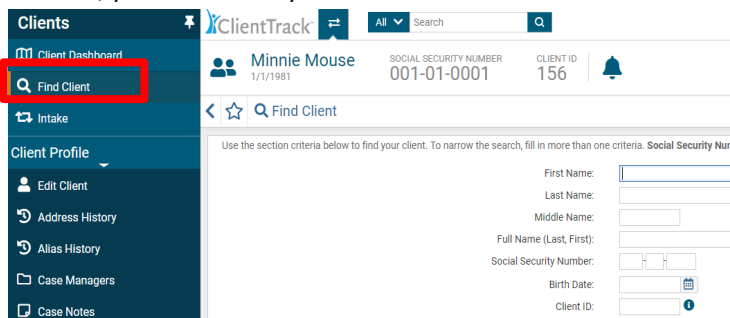
window will appear below it. Select **“Add New”** to add a new notification. A new window will open where you can set up the new notification as seen here. After setting up the notification, you can review your notifications and calendar by clicking on the bell and selecting **“View Notifications.”**



MANAGING CLIENT INFORMATION AND PROGRAM ENROLLMENTS

FINDING A CLIENT IN THE SYSTEM

Before entering a client into the system as a new client, you should always conduct a search for the client to see if there is an existing client record in the system. To search for a client, go to the **“Clients”** dashboard and click on **“Find Client”** in the upper left-hand corner of the screen outlined in red on page 11. It is **imperative you do not enter a duplicate client record into the system in order to ensure the accuracy and overall quality of the data.** To speed the search process and reduce the chance for input error, input as few characters as possible in the criteria fields.



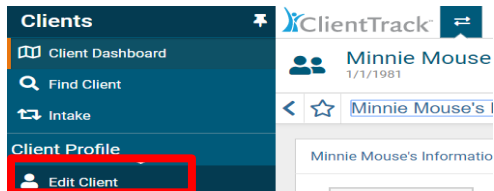
*IHCDA works to eliminate duplicate records in ClientTrack. Please contact the HMIS Help Desk by emailing HMISHelpDesk@ihcda.IN.gov with clients who have multiple records in the system. When sending a notification of duplicates or any information regarding clients to the Help Desk, please **ONLY** send Client ID*

You may search for a client by entering the following:

- First two or three letters of the client first/last name (use as few letters as possible of the first and last name to conduct a thorough search)
- Social Security Number
- Birth Date
- Client ID Number

It is important to try different options for your search. **Again, it is best to ONLY enter the first few letters of the first/last name and not rely solely on a social security number or birth date, as those elements have a higher rate of missing or inaccurate data.** Another option for searching is to search different spellings of the client's name remembering to search for nicknames such as "Joe" in addition to "Joseph" or "Jen" in addition to "Jennifer."

If the client is already in the system, highlight the client's name in the search results and click on the **Client Name** to select that record. The selected client's information will be displayed at the top of the screen and all information entered from this point forward while on the client's dashboard will be associated with the currently selected client.

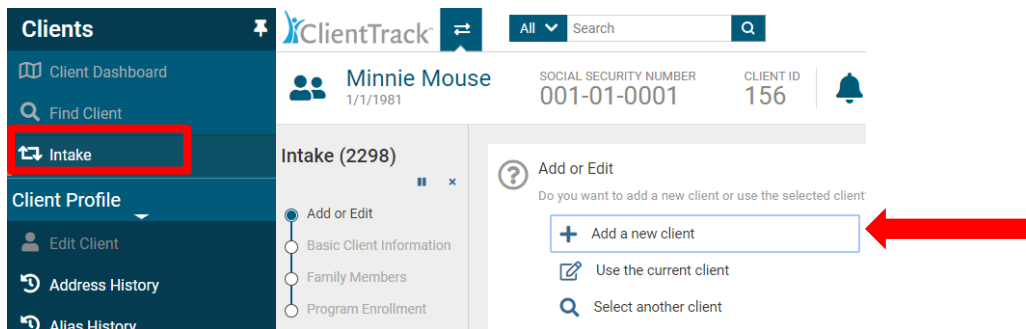


After selecting the client in the search list and going to the client's dashboard, if the client's basic information has changed, click on the **"Edit Client"** link in the list of case management tools found on the left-hand side of the screen outlined in red below to make any necessary changes to the client demographic information (i.e., birth date, ethnicity, name change, etc.). *****Please note that the "Save" button will save the changes made to the screen and leave you on the same page. The "Save & Close" button will save the changes you have made to the screen and move you to the next one.***

ADDING A NEW CLIENT WITH A PROGRAM ENROLLMENT

ClientTrack utilizes a specific workflow to step you through the process of completing all required assessments at entry and discharge. The workflow is easy to use, and it automatically prompts you for the necessary information.

After conducting a search for the client in the system to ensure an existing client record did not already exist, you can add a new client record by selecting **"Intake"** in the upper left-hand corner of the screen found under **"Find Client."** Then choose **"Add New Client"** when prompted as seen below.



Enter your client's first and last name and click **"Next."** If a duplicate client already exists and was not identified during the client search the first time, **a warning in red letters** will be displayed. It is very important to review the displayed list. If the client is already in the system, click the client's name to select the existing client record. If the client you are entering is a new client, do not select a client in the displayed list, click **"Next"** to proceed with the intake process.

Add the client's basic information including date of birth, social security number, demographics, disabling condition, Veteran status, and address. Click **"Finish"** when the client's basic information is complete.

ClientTrack | Minnie Mouse | Intake (2298) | + Client Information

Basic Client Information

Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.

First Name: *

Last Name: *

Middle Name:

Suffix:

Name Quality: *

Social Security Number: *

SSN Quality: * ☐ Client doesn't know ☐ Client refused ☐ Data not collected

Basic Client Demographics

Birth Date:

Client Age: *

Date of Birth Quality: * ☐ Full DOB Reported ☐ Approximate or Partial DOB Reported ☐ Client doesn't know ☐ Client refused ☐ Data not collected

Ethnicity: *

Race: *

Gender: *

Veteran Status: *

Contact Information

Address:

Address 2:

Please note that all the data elements are self-declared by the client and not attributed by the case manager or data entry personnel. The option **"Data Not Collected"** indicates that the question was not asked of the client and will report as missing on reports. **Please do not make up information or answer for the client.** All data fields marked with a red * are required fields.

Definitions of Basic Client Information Requirements

- **First Name** - Legal first name (do not add nicknames in "quotes" because those are not searchable elements).
- **Last Name** - Legal last name.
- **Name Quality** - Describes the quality of the name reported by the client. Options are: Full name reported, Partial, street name, or code name reported, Client doesn't know, Client refused, or Data not collected.
- **Social Security Number (SSN)** - If the client doesn't know or refuses to provide their SSN, **DO NOT under any circumstance enter a fake social security number such as 123-45-6789 or 999-99-9999**. Select the data quality option that best reflects the client's response. Please note that "Data not collected" means that the question was not asked of the client and will report as missing on the APR. If the client doesn't know, the best selection is "Client doesn't know."
- **Birth Date** - Month, day, and year the client was born. Again, do not make up a birth date. Choose the appropriate data quality option that best reflects the client's response.
- **Ethnicity** - Hispanic/Latino origin includes individuals of Cuban, Mexican, Puerto Rican, South, or Central American origin.
- **Race** - A person can identify with multiple races, and this is a multi-select box that allows for up to 5 races to be selected. Click on all that apply.
- **Gender** - A person can identify with multiple genders, and this is a multi-select box that allows for up to 5 gender identities to be selected. Click all that apply.

- **Disabling Condition** – Select the appropriate response as reported by the client. *Please note that if the client reports at least one barrier on the Barriers Assessment, then the disabling condition status should be “Yes”.* You can update the disabling condition by clicking on the **“Edit Client”** link.
- **Veteran Status** – Select the appropriate response as reported by the client. If you select “Yes” for Veteran Status here, you will be prompted in the workflow to complete the Veterans Assessment.
- **Address** – Add the address where the client currently resides (emergency shelter, etc.). If the client enters emergency shelter, you should use their previous address.
- **Family** – Do NOT enter anything in the “Family” field. ClientTrack will create a household/family account automatically.
- **Relationship to Head of Household** – When entering the first client in the household, the system will default to **“Self”**. It is imperative this information is entered correctly for ALL household members. Otherwise, your reports will not accurately reflect the clients and household make-up.

ADDING HOUSEHOLD MEMBERS

Next you will be prompted to add additional household members to include for the program enrollment or services. To add household members, click on the empty box and complete the row of information (name, birth date, etc.) for the new household member(s). You can tab through the fields to complete the required information and add any number of household members at this time by repeating these steps.

The screenshot shows the ClientTrack interface. On the left is a navigation menu with options like 'Client Dashboard', 'Find Client', 'Intake', 'Client Profile', 'Edit Client', 'Address History', 'Alias History', 'Case Managers', 'Case Notes', 'Client Files', 'Family Members', 'Interested Others', and 'Living Situation'. The main area displays the 'Family Members' section for a client named 'Another Client' (SSN: 131-31-3131, Client ID: 3325). It includes instructions on how to add family members and a table with one row containing the client's information. A red arrow points to the 'Add' button (a plus sign in a box) in the 'Family Members' table.

First Name	Middle Name	Last Name	Suffix	Name Quality	Birth Date	Age	Birth Date Quality	Gender	SSN	SSN Qual
Another		Client		Full name reported	02/02/1989	30	Full DOB Reported	Male	131-31-3131	

The system will automatically conduct a search for the new household member after you enter the first and last name. If the new household member is already in the system, click on the appropriate name in the search list that appears in the new window to attach the existing client record to the household. If the household member is a new client, click on **“Cancel”** in the search window and proceed entering the new household’s information in the required data fields.

Click **“Save & Close”** when finished adding household members.

PROGRAM ENROLLMENT

Programs vary in their data requirements and ClientTrack will prompt you through the workflow to collect all of the required HUD data elements for your specific program. Please note that all fields with an **asterisk *** are required data fields and you will not be able to proceed in the workflow until all of the required information is completed.

Select your **“Program”** with the drop down box and then select which household members to enroll by clicking on the empty box beside the client(s) name. If a check mark appears by a client name on the program enrollment screen (as seen below), the client will be enrolled in your program. You can de-select a client by clicking on the check mark beside his/her name again to remove the check mark and ensure the client is not enrolled.

Remember to change the Enrollment Date if you are back dating the information. To ensure accurate data quality, enter all client data in a timely manner. “Date of Move In” is only prompted for clients enrolling in Permanent Housing programs (RRH, PH, PSH). If you don’t find your program option when enrolling a client, cancel the workflow by clicking the black “X” in the workflow screen found in the upper left-hand corner and please notify IHCD immediately by emailing HMISHelpDesk@ihcda.IN.gov . Program information must be set up in the system before you can begin to enroll clients.

HMIS UNIVERSAL DATA ASSESSMENT FOR INTAKE WORKFLOW

Complete all the required data fields indicated by an **asterisk *** and click **“Save”** to continue.

Definitions of Universal Data Assessment Requirements

- **Assessment Date** – Date the assessment was completed with the client (field will auto-fill with today's date).
- **Assessment Type** – Defaulted and cannot be changed during the workflow. If you notice that you're completing the incorrect assessment,

contact the HMIS Help Desk where you will be assisted.

- **Assessor** – Case manager completing the assessment and who will automatically be assigned to all case members.
- **Program** – Displays the name of the Program in which client is enrolled
- **Disabling Condition** – Enter the client's answer (Yes, No, Client Doesn't Know, Client Refused, Data Not Collected)
- **Client Location** – Defaulted information that is set up with your program in the system. If this information is missing when completing an assessment, please contact the HMIS Help Desk.
- **Prior Living Situation** – Identify where the client was staying on the night before the client is enrolled in your program. The built-in logic will prompt you for more data depending on the selection made for this question. Those additional data elements are the following:
 - **Length of stay in prior living situation**
 - **Approximate date homelessness started**
 - **Regardless of where they stayed last night – Number of times the client has been on the streets, in ES, or SH in the past three years including today**
 - **Total number of months homeless on the street, in ES, or SH in the past three years** - Data in this section is used along with disabling condition to determine whether a client is chronically homeless. *HUD strongly encourages HMIS users to just ask the client for the information and record the client's answer. Attempting to tie each individual response with definitions or documentation requirement is not the attempt of this question.*
- **Health Insurance Assessment** – Complete the required information pertaining to the client's insurance status. If a client's health insurance status has changed, change the status of the type of insurance to "No" and then add an end date. Then you can change the Health Insurance status to "No" and click "Save" to continue.

VETERAN ASSESSMENT FOR INTAKE WORKFLOW

The Veteran Assessment will only be included in the workflow if you select **“Yes”** for the **“Veteran Status”** on the basic information screen of the client (as seen on page 13).

If the Veteran Status is **“No,”** then the Veteran Assessment will not be collected in your program enrollment. Please be sure to review the Veteran Status with the client and select the appropriate response on the **“Basic Client Information”** screen of the intake workflow or **Edit Client”** screen on the client record.

On the Veteran Assessment, select all **“Theatre(s) of Operation(s)”** to move forward in the workflow. To indicate which operation the client served in, change the **“Status”** of the specific operation to **“Yes”** with the drop down in that row. You can select more than one operation of service by changing the status to

“Yes” for each one. To complete the Veteran Assessment, click **“Save.”**

HMIS Barriers Assessment for Intake Workflow

To select a barrier, click on the drop-down box for **“Barrier Present”** and change the status to **“Yes.”** The system defaults **“No”** for all barriers. Complete any required fields that appear after selecting that specific barrier. Please note that the date identified is the program enrollment date – the date the client presents to you and qualifies for entry in the program. It is important to keep in mind that clients must have at least one barrier to be eligible for some programs (such as Permanent Supportive Housing)

If **no barriers** are present at enrollment, select all barriers and leave the **“Barrier Present”** status as **“No”** and click **“Save & Close.”**

Domestic Violence (DV) Assessment for Intake Workflow

Intake (2298) + Domestic Violence Assessment

If the client has been a victim of domestic violence, select Yes for Domestic Violence Experience, and select when the experience occurred.

[Default Client's Last Assessment](#)

Assessment Active

Assessment Date: 11/21/2019

Domestic Violence Experience:

- ☐ Yes
- ☐ No
- ☐ Client doesn't know
- ☐ Client refused
- ☐ Data Not Collected

Restriction:

- ☐ Restrict to Organization
- ☒ Restrict to MOU/InfoRelease

Complete the required information for the Domestic Violence Assessment. Please note that if domestic violence is reported and you select **“Yes”** for **“Domestic Violence Experience,”** you will be prompted for more information. If the client reports no domestic violence, then click **“Save”** to continue through the workflow.

FINANCIAL ASSESSMENT FOR INTAKE WORKFLOW

Complete the status for **“Income from Any Source”** and **“Non-Cash Benefits from Any Source”** with the provided drop down lists. If the status for either of these financial sources is **“Yes,”** you will be prompted to provide more information on the **“Type”** (definitions below) of income/benefit and the **amount (monthly amount)** with the list that appears below the status after selecting **“Yes.”** Please note that Non-Cash Benefits will appear below Income, and you will need to scroll down to input that information. **Also input any income a child may receive (i.e., SSDI) on the head of household’s income/benefits information. You will not complete a Financial Assessment for children in the household.**

Intake (2298) + Income and Sources, Non-Cash Benefits

Indicate below the client's sources of monthly income, non-cash benefits and expenses.

The following instructions are quoted from the HMIS Data Manual:

- When a client has income, but does not know the exact amount, a “Yes” response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.
- Income received by or on behalf of a minor child should be recorded as part of household income under the Head of Household, unless the federal funder in the HMIS Program Specific Manual instructs otherwise. Income should be recorded at the client-level for heads of household and adult household members. Projects may choose to collect this information for all household members including minor children, as long as this does not interfere with accurate reporting per funder requirements. Projects collecting data through client interviews should ask clients whether they receive income from each of the sources listed rather than asking them to state the sources of income they receive.
- Income data should be recorded only for sources of income that are current as of the information date (i.e. have not been specifically terminated). As an example, if a client's employment has been terminated and the client has not yet secured additional employment, the response for Earned income would be “No.” As a further example, if a client's most recent paycheck was 2 weeks ago from a job in which the client was working full time for \$15.00/hour, but the client is currently working 20 hours per week for \$12.00 an hour, record the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour).

[Default Last Assessment](#)

Assessment Active

Assessment Date: 11/21/2019

Income from Any Source: Yes

Non-Cash Benefits from Any Source: Yes

Expenses: - SELECT -

Intake (2298) **+ Income and Sources, Non-Cash Benefits**

Income

<input type="checkbox"/>	Type ▲	Description ▲	Monthly Amount ▲	Restriction ? ▲
<input type="checkbox"/>	Earned Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Self Employment	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Worker's Compensation	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Unemployment Insurance	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Pension	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Supplemental Security Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Social Security Disability Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Retirement (Social Security)	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Veteran's Pension	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Veteran's Disability Payment	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	TANF	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Child Support	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
Count/Total Monthly Income:			0	\$0.00

Definitions of Sources of Income

- **Earned Income** – Employment income
- **Self-Employment**
- **Worker's Compensation** – Income for an individual who has been injured on the job
- **Unemployment Insurance** – Unemployment benefits from the State
- **Other Pension**
- **Supplemental Security Income** – A federal program providing additional income for older and disabled individuals with little to no income stream
- **Social Security Disability Income** – A monthly compensation to individuals who can no longer work due to their medical conditions
- **Retirement (Social Security)** – Income payment provided by government for individuals who qualify
- **Veteran's Pension**
- **Veteran's Disability Payment**
- **TANF** –Temporary Assistance for Needy Families
- **Child Support** – Income received from one parent to another to care for children
- **Other Income** – Any income not previously listed

Type ▲	Description ▲	Monthly Amount ▲	Restriction ⓘ ▲
<input type="checkbox"/> Food Stamps/Money for food on benefits card	<input type="text"/>	<input type="text"/>	Restrict to MOU/infoRelease ▼
<input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants, and Children	<input type="text"/>	<input type="text"/>	Restrict to MOU/infoRelease ▼
<input type="checkbox"/> TANF Child Care Services	<input type="text"/>	<input type="text"/>	Restrict to MOU/infoRelease ▼
<input type="checkbox"/> TANF Transportation Services	<input type="text"/>	<input type="text"/>	Restrict to MOU/infoRelease ▼
<input type="checkbox"/> Other TANF-funded Services	<input type="text"/>	<input type="text"/>	Restrict to MOU/infoRelease ▼
<input type="checkbox"/> Other Source	<input type="text"/>	<input type="text"/>	Restrict to MOU/infoRelease ▼
1 Depreciated in 2017 (HMIS v6.1)		Count/Total Monthly Income:	0 \$0.00

Restriction: ☐ Restrict to Organization ⓘ ☒ Restrict to MOU/infoRelease

Definitions of Non-Cash Benefits

- **Food Stamps/Money for Food on Benefits Card** – Monthly payments issued by the government to persons with low income that can be redeemed for food at stores.
- **Special Supplemental Nutrition Program for Women, Infants and Children (WIC)** – A program geared toward supplying nutritional food for at risk pregnant women and their families.
- **TANF Child Care Services** – Childcare funding assistance
- **TANF Transportation Services** – Transportation funding assistance
- **Other TANF Funded Services**
- **Other Source** – Any source not previously listed

HMIS UNIVERSAL DATA ASSESSMENT FOR CHILD AT INTAKE

Complete the required data elements for the child on the HMIS Universal Data Assessment. You will notice that the child's assessment does not require as much information as the adult's assessment. Click **"Save"** when finished with the assessment to continue in the workflow.

ClientTrack All Search

Little Client 2/2/2012 SOCIAL SECURITY NUMBER 225-28-2525 CLIENT ID 3326

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information.

Note:

- Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data.
- Changing any project setup data with existing enrollments may affect or break the logic for 3.917.
- 3.917 may not always show as expected because of changed setup data or missing required data links

Default Client's Last Assessment ⓘ

Assessment Date: 11/21/2019 ⓘ

Age at Assessment: 7

Assessment Type: Entry ▼

Assessor: Lori Wood ⓘ

Program: My Fake Organization (ES - B10) ▼

Disabling Condition: - SELECT - ▼

Health Insurance

Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Covered by Health Insurance: - SELECT - ▼

Default Last Insurance Status ⓘ

Type ▲	Status ▲	Reason No ⓘ ▲	Other Coverage ▲
Private	- SELECT - ▼	- SELECT - ▼	
Private - Employer	- SELECT - ▼	- SELECT - ▼	
Private - Individual	- SELECT - ▼	- SELECT - ▼	
Medicare	- SELECT - ▼	- SELECT - ▼	
Medicaid	- SELECT - ▼	- SELECT - ▼	
State Children's Health Insurance Program S-CHIP	- SELECT - ▼	- SELECT - ▼	
Military Insurance	- SELECT - ▼	- SELECT - ▼	
Other Public	- SELECT - ▼	- SELECT - ▼	
State Funded	- SELECT - ▼	- SELECT - ▼	

HMIS BARRIERS ASSESSMENT FOR CHILD AT INTAKE

Complete any barrier information for the child you are enrolling. If **no barriers** are present at enrollment, select all the barriers and leave the **“Barriers Present”** status as **“No”** and click **“Save & Close.”**

The screenshot shows the 'Barriers' assessment form in the ClientTrack system. The header includes the user 'Indiana HMIS Train', the date '2/2/2012', and client information: 'SOCIAL SECURITY NUMBER 225-28-2525' and 'CLIENT ID 3326'. A left sidebar shows navigation options: 'Add Family Member', 'Review Family Members', 'Enrollment', 'Client, Little', 'Entry Assessments', and 'Barriers / Special Needs'. The main form area has a title 'Barriers' and a description: 'Use this form to identify whether a client has each individual barrier or not. The Clients last assessment is displayed as a default. You may, optionally, click Previous Barriers Detail to view information about the defaulted records or click View Barrier History to review all previous barriers.' Below this is a section for 'Assessment Active' with fields for 'Identified Date' (11/21/2019), 'Screen' (HMIS Barriers), and 'Disabling Condition' (Yes). The main table lists various barriers with columns for 'Barrier', 'Help', 'Barrier Present?', 'Condition is Indefinite', 'Explanation', 'Restriction', and 'Previous Barrier Details'. The barriers listed are Alcohol Abuse, Developmental Disability, Drug Abuse, HIV/AIDS, Mental Health, Physical Disability, and Chronic Health Condition. Each barrier has a 'Barrier Present?' dropdown menu set to '- SELECT -' and a 'Restriction' dropdown menu set to 'Restrict to Organization'.

COMPLETING THE INTAKE WORKFLOW

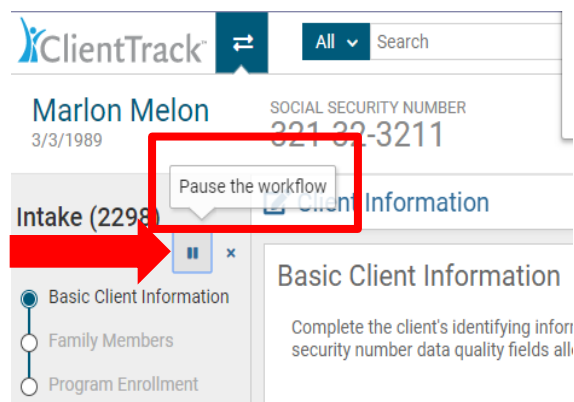
Once you have completed the required entry assessments for your client and household members, you will be prompted to **“Finish”** the workflow. If the workflow is complete, then click **“Finish.”** You will then be directed back to the head of household’s client dashboard, and you can see the new program enrollment under **“Enrollments”** on the client record.

The screenshot shows the 'Intake (2298)' workflow completion screen in the ClientTrack system. The header includes the user 'ClientTrack', a search bar, and client information: 'SOCIAL SECURITY NUMBER 131-31-3131' and 'CLIENT ID 3325'. A left sidebar shows navigation options: 'Intake (2298)', 'Basic Client Information', 'Family Members', 'Program Enrollment', 'Client, Another', and 'Client, Little'. The main form area has a title 'Intake (2298)' and a message: 'You're done! All required steps have been completed.' Below this is a large red button labeled 'Finish' with the text 'Close the workflow' underneath it.

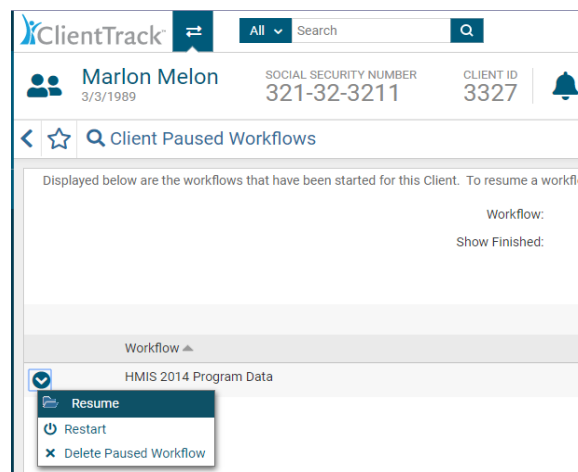
If you need to go back and change information entered in the workflow prior to finishing, you can click on the specific section of the workflow you wish to return to in the workflow window that appears on the left-hand side of the client record (outlined in red above). Clicking on the link beside the green dot will take you to that specific section of the workflow where you can edit information.

PAUSING A WORKFLOW

You may also **“Pause”** a workflow by clicking on the pause button located in the upper right-hand corner of the workflow window beside the black **“X”** (as seen on page 21 in the red box with the red arrow). The black **“X”** will cancel the workflow. The pause feature will allow you to pause the workflow at any time so you can return to it later.



To **resume a paused workflow**, click on **“Paused Workflows”** at the bottom of the list **Client Profile** choices located on the left-hand side of the client record. Then click on the blue action wheel beside your paused workflow to select **“Resume”** in the drop down. This will take you back to where you paused the workflow, and you can finish the assessments for the program enrollment.



UNIQUE PROGRAM REQUIREMENTS AT ENTRY

There are variations in data requirements for different program enrollments. In the following section are descriptions of their unique requirements during the Intake workflow for the following programs:

1. SSVF
2. PATH
3. HOPWA
4. RHY

1. SUPPORTIVE SERVICES FOR VETERAN FAMILIES (SSVF) ENROLLMENT AT INTAKE

In addition to the previous assessments outlined earlier in this manual, the SSVF enrollment will require documentation of a client’s **Housing Move In Date** for Rapid Re-Housing enrollments as seen below. You can use the calendar icon to complete date fields by clicking on the calendar icon and then selecting the appropriate date in the calendar. All fields with an **asterisk *** are required fields.

+ HUD Program Enrollment

Select the Project you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling.

The Project Start Date is:

- for **Street Outreach projects** – it is the date of first contact with the client.
- for **Emergency Shelters** – it is the night the client first stayed in the shelter for the consecutive shelter period from entry to exit. Night by night shelters, which use a bed-night tracking method will have a project start date and will allow clients to re-enter as necessary without "exiting and restarting" for each stay for a specified period.
- for **Safe Havens and Transitional Housing** – it is the date the client moves into the residential project (i.e. first night in residence).
- for **all types of Permanent Housing, including Rapid Re-Housing** – it is the date following application that the client was admitted into the project. To be admitted indicates the following factors have been met:
 - 1) Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify – though all documentation may not yet have been gathered;
 - 2) The client has indicated they want to be housed in this project;
 - 3) The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time
- for **all other types of Service projects including but not limited to:** services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

Project: * My Fake Organization SSVF RRH (VA=R10)

Household

Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

	Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household	Housing Move-In Date
<input checked="" type="checkbox"/>	Melon, Marlon	Male	30	11/21/2019	Lori Wood	Self	11/21/2019
1							

Restriction: * ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

The SSVF project enrollment will also require completion of the **Annual Median Income (AMI)** and, **VAMC Station Number** before you can proceed in the workflow as seen on the next page.

+ Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information.

Note:

- Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data.
- Changing any project setup data with existing enrollments may affect or break the logic for 3.917.
- 3.917 may not always show as expected because of changed setup data or missing required data links

Default Client's Last Assessment ⓘ

Assessment Date: * 11/21/2019

Age at Assessment: 30

Assessment Type: * Entry

Assessor: * Lori Wood

Program: My Fake Organization SSVF RRH (VA=R10)

Disabling Condition: * Yes

Household Income as a Percentage of AMI: * Less than 30%

VAMC Station Number: * (583) Indianapolis, IN

SSVF also requires completion of the Veteran Information: Branch and Discharge Status, Military Service Dates and Selection of the "Theatre(s) of Operations"

Marlon Melon
3/3/1989

SOCIAL SECURITY NUMBER
321-32-3211

CLIENT ID
3327

Intake (2298)

+ Veteran Information

Branch and Discharge Status

Please select the branch and discharge status. The HMIS Data Manual provides the following instructions for veterans serving in more than one branch: For veterans who served in more than one branch of the military, select the branch in which the veteran spent the most time. In the event that a client's discharge status is upgraded during enrollment, the record should be edited to reflect the change. *

Branch of the Military: * -- SELECT --

Discharge Status: * -- SELECT --

Military Service Dates

In the interest of data quality ClientTrack provides date fields and encourages users to enter exact dates if possible. If not, use the first of the year or another standard date determined by your organization. For HMIS purposes, ClientTrack will always calculate years of military service only using year.

Service Entry Date: *

Service Exit Date: *

Please Select Theatre(s) of Operation(s) ▲	Status* ▲
<input type="checkbox"/> Theatre of Operations: World War II	-- SELECT --
<input type="checkbox"/> Theatre of Operations: Vietnam War	-- SELECT --
<input type="checkbox"/> Theatre of Operations: Persian Gulf War (Operation Desert Storm)	-- SELECT --
<input type="checkbox"/> Theatre of Operations: Afghanistan (Operation Enduring Freedom)	-- SELECT --
<input type="checkbox"/> Theatre of Operations: Iraq (Operation Iraqi Freedom)	-- SELECT --
<input type="checkbox"/> Theatre of Operations: Iraq (Operation New Dawn)	-- SELECT --
<input type="checkbox"/> Theatre of Operations: Other Peace-keeping Operations or Military Interventions (such as Lebanon, Panama, Somalia, Bosnia, Kosovo)	-- SELECT --
<input type="checkbox"/> Theatre of Operations: Korean War	-- SELECT --

Save

SSVF clients enrolling in the Prevention program will also be required to complete a **Homeless Prevention Assessment** as seen below.

ClientTrack

Peach Pitt
6/1/1947

SOCIAL SECURITY NUMBER
???-??-8321

CLIENT ID
3221

Intake (2298)

+ HP Targeting Criteria

Answer the SSVF HP Targeting Criteria to see the client's HP applicant total points.

SSVF Homeless Prevention Assessment

COMPENSATING ACTIVITY

Assessment Date: * 12/28/2021

Is Homelessness Prevention targeting screener required? *

☐ Yes

☐ No

Restriction: ☐ Restrict to Organization

☒ Restrict to MOU/InRelease

Save

SSVF Homeless Prevention Assessment

Assessment Active

Assessment Date: * 12/28/2021 

Is Homelessness Prevention targeting screener required? * ☒ Yes
☐ No

Housing loss expected within...: * ☐ 1-6 days
☐ 7-13 days
☐ 14-21 days
☐ More than 21 days

Current household income: * ☐ \$0 (i.e., not employed, not receiving cash benefits, no other current income)
☐ 1-14% of Area Median Income (AMI) for household size
☐ 15-30% of AMI for household size
☐ More than 30% of AMI for household size

History of literal homelessness (street/shelter/transitional housing) (any adult): * ☐ Most recent episode occurred within the last year
☐ Most recent episode occurred more than one year ago
☐ None

Head of Household is not a current leaseholder: * ☐ Yes
☐ No

Head of household (HoH) never been a leaseholder: * ☐ Yes
☐ No

Currently at risk of losing a tenant-based housing subsidy or housing in a subsidized building or unit (household): * ☐ Yes
☐ No

Rental Evictions within the past 7 years (any adult): * ☐ No prior rental evictions
☐ 1 prior rental eviction
☐ 2 or more prior rental evictions

Criminal record for arson, drug dealing or manufacture, or felony offense against persons or property (any adult): * ☐ Yes
☐ No

Incarcerated As Adult (any adult in household): * ☐ Not incarcerated
☐ Incarcerated once
☐ Incarcerated two or more times

Discharged from jail or prison within last six months after incarceration of 90 days or more (adults): * ☐ Yes
☒ No

Registered sex offender (any household members): * ☐ Yes
☒ No

Head of household with disabling condition (physical health, mental health, substance use) that directly affects ability to secure/maintain housing: * ☒ Yes
☐ No

Currently pregnant (any household member): * ☐ Yes
☒ No

Single parent household with minor child(ren): * ☐ Yes
☒ No

Household includes one or more young children (age six or under), or a child who requires significant care: * ☒ No
☐ Youngest child is under 1 year old
☐ Youngest child is 1 to 6 years old and/or one or more children (any age) require significant care

Household size of 5 or more requiring at least 3 bedrooms (due to age/gender mix): * ☐ Yes
☒ No

Household includes one or more members of an overrepresented population in the homelessness system when compared to the general population: * ☒ Yes
☐ No

HP applicant total points: 51

Grantee targeting threshold score: * 45

Restriction: ☐ Restrict to Organization 
☒ Restrict to MOU/InfoRelease

Save

2. PROJECTSS FOR ASSISTANCE IN TRANSITION FROM HOMELESSNESS (PATH) ENROLLMENT AT INTAKE

To manage your PATH program and clients in ClientTrack, be sure to log into the “2020 HMIS” workgroup. In addition to the entry assessments outlined earlier in this manual, the PATH project enrollment will require you to document:

- **Date of Engagement** - Date of Engagement is defined as the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan.
- **Date PATH Status Determined** – Date client’s enrollment in PATH is determined.
- **Client Became Enrolled in PATH** - A PATH enrollment occurs at the point when a client has formally consented to participate in services provided by the PATH project. This does not mean the time at which the client formally consents to services by a community mental health center.
- **Reason Not Enrolled in PATH** – Complete this data field if client is not enrolled in PATH.

+ HUD Program Enrollment

Select the Project you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling.

The Project Start Date is:

- for **Street Outreach projects** – it is the date of first contact with the client.
- for **Emergency Shelters** – it is the night the client first stayed in the shelter for the consecutive shelter period from entry to exit. Night by night shelters, which use a bed-night tracking method will have a project start date and will allow clients to re-enter as necessary without “exiting and restarting” for each stay for a specified period.
- for **Safe Havens and Transitional Housing** – it is the date the client moves into the residential project (i.e. first night in residence).
- for **all types of Permanent Housing, including Rapid Re-Housing** – it is the date following application that the client was admitted into the project. To be admitted indicates the following factors have been met:
 - 1) Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify – though all documentation may not yet have been gathered);
 - 2) The client has indicated they want to be housed in this project;
 - 3) The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time.
- for **all other types of Service projects including but not limited to:** services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

Project: * My Fake Organization SSO (PATH-R10)

Household

Excerpt from the HMIS Data Standards Manual “A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed).”

<input type="checkbox"/>	Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household	Date of Engagement	Date PATH Status Determined	Client became enrolled in PATH	Reason not enrolled in PATH
<input type="checkbox"/>	Friday, Happy	Female	30			-- SELECT --			-- SELECT --	

+ SOAR Connection

Indicate the **Connection with SOAR** for the client below

Default Client's Last Assessment ⓘ

Assessment Active

Assessment Date: * 11/21/2019

Connection with SOAR: * Yes

Restriction: * ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Current Living Situation will also be required as seen below. Complete all the required data fields to complete the PATH enrollment. This assessment will complete the PATH program specific data requirements at entry.

Happy Friday 3/3/1989 SOCIAL SECURITY NUMBER 222-55-4444 CLIENT ID 3329

Intake (2298) + Current Living Situation

Record the Clients Current Living Situation information below. If desired record a contact by checking the Record Contact and filling out the information for the contact. Also other services can be recorded.

Information Date: 11/22/2019
Enrollment: 11/22/2019 - My Fake Organization SSO (PATH-R10)

Current Living Situation Information

Current Living Situation: Place not meant for habitation
Location Detail: Beneath the 10th Street Bridge over Big Creek
Record Contact: ☒

Contact Service Information

Contact Service: PATH - Contact
Location: My Fake Organization
Use Geolocation: ☐
Comments:
Restriction: ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Save Skip

3. HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS (HOPWA) ENROLLMENT AT INTAKE

In addition to the entry assessments outlined earlier in this manual, for a HOPWA program enrollment an **Assistance Assessment** and **T-Cell Count/Viral Load Assessment** are required to be completed for the client as seen on the next page.

Happy Friday 3/3/1989 SOCIAL SECURITY NUMBER 222-55-4444 CLIENT ID 3329

Intake (2298) Assistance Assessment

The medical assistance assessment is primarily used to determine whether HIV positive clients are accessing medical assistance benefits for which they may be eligible. Medical assistance data is required for clients with HIV/AIDS who are enrolled in a HOPWA-funded program.

Default Client's Last Assessment

Assessment Active
Assessment Date: 11/22/2019

Medical Assistance Type	Status	Reason No (if applicable)	Restriction
<input type="checkbox"/> Receiving Public HIV/AIDS Medical Assistance	-- SELECT --		Restrict to MOU/InfoRelease
<input type="checkbox"/> Receiving AIDS Drug Assistance Program (ADAP)	-- SELECT --		Restrict to MOU/InfoRelease

Happy Friday
3/3/1989

SOCIAL SECURITY NUMBER
222-55-4444

CLIENT ID
3329

Intake (2298) + T-cell/Viral Measurements

This data, as is all HIV/AIDS data, is confidential, covered under special law, and may not be shared without the expressed consent of the client. Providing the information is completely voluntary on the client's part and failure to report (i.e. client doesn't know or client refused) will not be considered in data quality for either the CoC or the HOPWA program.

Assessment Active

Assessment Date: 11/22/2019

T-cell (CD4) Count Available: Yes

Viral Load Available: Available

Date	Measurement	Value	How was the data obtained	Restriction
11/22/2019	Viral Load	0 999999	Client Report	Restrict to MOU/InfoRelease
11/22/2019	T-cell Count	0 1500	Client Report	Restrict to MOU/InfoRelease

Restriction: ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Use the drop-down box to change the status of each field to **"Yes"** if the data is reported. After **"Yes"** is selected for **T-cell (CD4) Count Available** or **Viral Load Available**, additional fields will populate in the blue table below where the specific counts can be entered.

Client Dashboard

Find Client

Intake

Client Profile

Edit Client

Address History

Alias History

Case Managers

Case Notes

Client Files

Family Members

Interested Others

Living Situation

Notifications

Client Photo

Happy Friday
3/3/1989

SOCIAL SECURITY NUMBER
222-55-4444

CLIENT ID
3329

Intake (2298) + Family Financial Evaluation

Below is a list of all financial income assessments that belong to clients that are current members of the family. Select the desired income assessments to include in the Family Financial Evaluation

Evaluation Date: 12/04/2019

Date	Type	Monthly Income	Annualized
Do not use any of this client's assessments.			
12/4/2019	Entry	\$0.00	\$0.00
11/22/2019	Exit	\$0.00	\$0.00
11/22/2019	Exit	\$0.00	\$0.00
11/22/2019	Entry	\$0.00	\$0.00
11/22/2019	Entry	\$0.00	\$0.00
Total:		\$0.00	\$0.00

Area: Hendricks County, IN

Family Size: 1

Percentage of Area Median Income: Area median income data isn't configured for this location.

Percentage of Federal Poverty Level: 0.00 %

Restriction: ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Complete the **Family Financial Evaluation**

4. RUNAWAY & HOMELESS YOUTH (RHY) ENROLLMENT AT INTAKE

HUD requires additional data collection for the Runaway & Homeless Youth (RHY) program in HMIS. There is a separate workgroup called **"2020 RHY"** to manage the RHY program and client information. Be sure to log in appropriately when working with RHY clients.

You will also complete the following assessments:

- Basic Care Program (BCP) Enrollment Status Assessment (see above)
- Employment Assessment
- Health Assessment
- Commercial Sexual Exploitation and Commercial Labor Exploitation Assessment
- Critical Issue(s) Assessment

- Formerly Ward of Assessment

ClientTrack All Search

Rhy Enrollment 1/1/2003 SOCIAL SECURITY NUMBER 111-88-7788 CLIENT ID 3330

Intake (2298)

- Basic Client Information
- Family Members
- Program Enrollment
- Rhy Enrollment
- New Assessment
- BCP Status
- Barriers / Special Needs
- Income
- Employment

RHY BCP Status Assessment

To determine the number of homeless persons eligible for FYSB in RHY BCP-funded emergency shelter projects.

RHY - BCP - Status

Collect once at project start for each stay. This element is required to be completed before project exit.

Date Status Determined: * 11/22/2019

Youth Eligible for RHY Services: * Yes

Runaway Youth: * Yes

Basic Care Program (BCP) Enrollment Status Assessment – Complete the required data and click “Save” to continue.

HMIS 2017 Employment Assessment

Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week employed, indicate if the client is looking for work.

Assessment Active

Assessment Date: * 11/22/2019

Employed? * No

Why Not Employed: * Not looking for work

Restriction: ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Child Education Assessment – Complete the required data and click “Save” to continue.

+ Child Education Assessment

Indicate if the child is currently enrolled in school at the time of assessment. If the child is enrolled, select the type of school and enter why the child is not enrolled. Enter any additional comments.

Assessment Active

Assessment Date: * 11/22/2019

Highest Grade Completed: * 10th Grade

School Status: * Dropped out

Comments:


Restriction: ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

+ Health Assessment

Select the appropriate general health status. If the client is female, you will need to select the appropriate pregnancy status. If the client is male, you will need to select the appropriate sexual orientation.

Default Client's Last Assessment 


Assessment Active

Assessment Date: * 11/22/2019 

General Health Status: * Good ▼

Dental Health Status: * Poor ▼

Mental Health Status: * Good ▼

Restriction: * ☐ Restrict to Organization 
 ☒ Restrict to MOU/InfoRelease

Health Assessment

- Complete the required data and click “Save” to continue.

RHY Entry Assessment – The RHY entry assessment is used to collect project entry data for RHY funded projects. Complete the required data and click “Save” to continue.

+ RHY Entry Assessment

The RHY entry assessment is used to collect project entry data for RHY funded projects.

Assessment Active

Assessment Date: * 11/22/2019 

Sexual Orientation: * -- SELECT -- ▼

Referral Source: * -- SELECT -- ▼

<input type="checkbox"/>	Critical Issue ▲	Status* ▲
<input type="checkbox"/>	Unemployment - Family member	<input type="radio"/> Yes <input type="radio"/> No
<input type="checkbox"/>	Mental Health Issues - Family member	<input type="radio"/> Yes <input type="radio"/> No
<input type="checkbox"/>	Physical Disability - Family member	<input type="radio"/> Yes <input type="radio"/> No
<input type="checkbox"/>	Alcohol or other drug abuse - Family member	<input type="radio"/> Yes <input type="radio"/> No
<input type="checkbox"/>	Insufficient Income to support youth - Family member	<input type="radio"/> Yes <input type="radio"/> No
<input type="checkbox"/>	Incarcerated Parent of Youth	<input type="radio"/> Yes <input type="radio"/> No

Restriction: * ☐ Restrict to Organization 
 ☒ Restrict to MOU/InfoRelease

System Use Assessment – Complete all the required data to move forward in the workflow. Be sure to check both **“Systems”** and change the default status of **“Child Welfare/Foster Care Agency”** and/or **“Juvenile Justice System”** to **“Yes”** if the client reports being a ward of that system. Again, the built-in logic may require additional data depending on the client’s responses. Click **“Save”** to continue.

+ System Use

Enter whether the client has formerly been a ward of the Child Welfare/Foster Care Agency system or the Juvenile Justice system.

Assessment Active

Assessment Date* 11/22/2019

<input type="checkbox"/>	System	Formerly a Ward Of*	Number of Years	Number of Months (1-11)
<input checked="" type="checkbox"/>	Child Welfare/Foster Care Agency	Yes	-- SELECT --	
<input checked="" type="checkbox"/>	Juvenile Justice System	Yes	-- SELECT --	

ADDING SERVICES

After completing an enrollment for a client, you can document services associated with the program enrollment with the **“Client Enrollment and Client Services”** link located in the list of case management tools on the left-hand side of the client record. To add a service, click **“Services”** and this will open the Services window where you can **“Add New”** services or manage current services. To document a new service, click on **“Add New.”**

Clients | ClientTrack | All | Search

Happy Friday 3/3/1989 | SOCIAL SECURITY NUMBER 222-55-4444 | CLIENT ID 3329

Client Services

The client's service history displays below. To record a service, click **Add New Service**. To record multiple services, click **Quick Services**. To edit or view an existing service, click **Edit Service** next to the record.

+ Add New Service | Quick Services

1 result found.

Date	Service	Units	\$ Total	Organization
Today (1 Services)				
11/22/2019	PATH - Contact	1.00	\$0.00	My Fake Organization
		1.00	\$0.00	

You will see the Services home screen where you select the enrollment associated with the service and the service provided. You can also enter units (1.00 unit = one hour of case management or a bus pass) to track costs. The comments section can be used for reminders; however, this is not a space for writing case notes. Case Notes will be covered later in the manual. Please note that services can be tailored to your organization’s needs. If a service does not appear in your agency’s options, contact the help desk to request that it be added.

When you are finished documenting a service, click on the **“Save”** button, and you will be taken back to the Services home screen where you can edit or delete a service you created.

QUICK SERVICES

Use the **Service Screen** list to filter services available. You may also filter services available by **Grant** and/or **Provider**. Select the services the client has received and verify the **Units** and **Unit Values**.

Service Screen: **Direct Services**
 Date: **11/22/2019**
 Grant: **--SELECT--**
 Provider Name:
 Enrollment: **--SELECT--**
 User Performing the Service(s): **Lori Wood**
 Location: **My Fake Organization**

4 results found.

Service	Unit Type	Units	Unit Value	Total	Help	Restriction
Case Management (0)						
Case/Care Management	Count	1.00	\$0.00	\$0.00		Restrict to MOU/infoRelease
Utilities (0)						
Utility - Electric	Dollars	1.00	\$1.00	\$1.00		Restrict to MOU/infoRelease
Utility - Gas	Dollars	1.00	\$1.00	\$1.00		Restrict to MOU/infoRelease
Utility Assistance	Count	1.00	\$0.00	\$0.00		Restrict to MOU/infoRelease
		0.00	\$0.00	\$0.00		

Save

Once you are finished adding multiple services click on the **“Save & Close”** button and you will return to the Services home screen where you can view and manage all services.

CASE NOTES

Timely and robust case notes assist you and other case managers at your organization in serving your clients. It is extremely important that meetings, calls, services, and other relevant information regarding your client are properly documented in case notes.

The client's case note history displays below. To create a new case note, click **Add New Case Note**. To view or edit a case note, click **Edit Case Note** next to the record. To preview and print case notes, check the **Print** box next to one or more case notes, and then click **Print Selected**.

Date	Regarding	User	Organization	Print
No records found.				

Add New Case Note **Print Selected**

To add case notes, click on the **“Client Profile”** link on the left-hand side of the screen. Next, click on **“Case Notes”**. Click on the **“Add New”** button on the upper right-hand side of the screen. ***Any case notes created for a client are restricted to case managers within your organization. No one outside of your agency can view your case notes.***

ClientTrack All Search Lori Wood (Training) Help Sign Out

Happy Friday 3/3/1989 SOCIAL SECURITY NUMBER 222-55-4444 CLIENT ID 3329

+ Case Note with Services

Complete case note **Entry Date**. Verify the **User** recording the note. Enter a brief title or description for the note in **Regarding**. Complete the case note in the text editor field. If **Read Only** is checked, no one will be able to delete or edit the case note unless the read only checkbox has been unchecked. Record services associated with this case note using the lower portion of the form.

Entry Date: 11/22/2019
 User: Lori Wood
 Regarding: Intake
 Note Type: Other

Supervisor Review

If a supervisor review is required, please check the box and select the name of the individual to make the assignment.

Review Required: ☐

Template: Case Note

Case Note
 Client Name: Happy Friday
 Met with client to complete intake information.

Happy Friday 3/3/1989 SOCIAL SECURITY NUMBER 222-55-4444 CLIENT ID 3329

+ Case Note with Services

Design HTML Preview

Read Only: ☐

Services

Use the fields below to record the services provided in association with the note above.

Default Enrollment: 11/22/2019 - My Fake Organization SSO (PATH-R10)

Service*	Enrollment*	Units Of Measure*	Unit Value*	Units*	Total	Staying on Streets, ES or SH*	Restriction
<input checked="" type="checkbox"/> CSP - Gas Card	11/22/2019 - My Fake Organization SSO (PATH-R10)	Count	\$25.00	1.00	\$25.00		Restrict
<input type="checkbox"/> - SELECT -	- SELECT -	- SELECT -			\$0.00		- SELEC

Restriction: ☒ Restrict to Organization ☐ Restrict to MOU/InfoRelease

You can also document a service simultaneously while documenting a case note (see below). Just select the enrollment from the drop-down box and add the service associated with the case note. Templates can also be set up for housing plans or any other specific required documentation so it can easily be drafted as a case note. Notify the help desk with any template requests.

Once a case note is created, it will appear in a list of case notes on the Case Notes home screen. You can use the blue action wheel beside the case note to:

- View Case Note
- Edit Case Note
- Delete Case Note

You can also select case notes to print by clicking on the **“Print”** box located in the far column and clicking on the **“Print Selected”** button beside the **“Add New”** button. This will print all the “checked” case notes.

UPDATE/ANNUAL ASSESSMENT

For clients who spend longer periods of time in your program or to document any changes in your client's status since entry, you can conduct an **"Update/Annual Assessment"** formerly known as the During Program Enrollment Assessment. This assessment is required if clients are enrolled in your program for a year or longer, and some programs like SSVF require more frequent assessments so be sure to check your program requirements for the Update/Annual Assessment.

The Update/Annual Assessment is also helpful for tracking significant changes to a household – for example a client gets a job and the income changes, a client receives his/her GED, etc. For your convenience, the assessment has been developed as a workflow with the following steps:

- Click on the **blue action wheel** beside your program enrollment.
- Select **"Update/Annual Assessment"** from the drop-down list; and
- Complete the required assessments prompted by the workflow and **save as you go**.

The screenshot displays the ClientTrack interface for a client named Dilly Dally. The left sidebar contains navigation options such as Client Dashboard, Find Client, Intake, Client Profile, Edit Client, Address History, Alias History, Case Managers, Case Notes, Client Files, Family Members, Interested Others, Living Situation, Notifications, Client Photo, Veteran Information, Paused Workflows, Common Client Assessments, Other Client Assessments, and Client Enrollment and Client Services. The main content area shows the client's information, including name, gender, ethnicity, and a list of enrollments. A dropdown menu is open for the 'My Fake Organization PH (CoC-R10)' enrollment, showing options like 'Add Household Member', 'View Case Members', 'Exit the Enrollment', 'Edit Enrollment', 'Edit Project Entry Workflow', 'Review Entry Assessments', and 'Update/Annual Assessment'. The 'Update/Annual Assessment' option is highlighted with a red box.

Client Profile

- Edit Client
- Address History
- Alias History
- Case Managers
- Case Notes
- Client Files
- Family Members
- Interested Others
- Living Situation
- Notifications
- Client Photo
- Veteran Information
- Paused Workflows

Common Client Assessments

Other Client Assessments

Client Enrollment and Client Services

Dilly Dally's Information

Name: Dilly, Dilly
Gender: Female
Ethnicity: Non-Hispanic/Latino

Dilly's Enrollments

Enrollment Description	Case Members	Project Start Date	Housing M
Active			
PH - Permanent Supportive Housing (disability required for entry)			
My Fake Organization PH (CoC-R10)	2	01/07/2016	01/07/2016

Update/Annual Assessment

Clients ClientTrack

Client Dashboard Find Client Intake Client Profile Edit Client Address History Alias History Case Managers Case Notes Client Files Family Members Interested Others Living Situation Notifications Client Photo Veteran Information Paused Workflows

Common Client Assessments Other Client Assessments Client Enrollment and Client Services

Dilly Dilly 1/1/1989 SOCIAL SECURITY NUMBER 222-22-5444 CLIENT ID 354

Assessment For Enrollment (1263)

HUD Program Enrollment

Select the Project you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling.

The Project Start Date is:
 • for **Street Outreach projects** – it is the date of first contact with the client.
 • for **Emergency Shelters** – it is the night the client first stayed in the shelter for the consecutive shelter period from entry to exit. Night by night shelters, which use a bed-night tracking method will have a project start date and will allow clients to re-enter as necessary without "exiting and restarting" for each stay for a specified period.
 • for **Safe Havens and Transitional Housing** – it is the date the client moves into the residential project (i.e. first night in residence).
 • for **all types of Permanent Housing, including Rapid Re-Housing** – it is the date following application that the client was admitted into the project. To be admitted indicates the following factors have been met:
 1) Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify – though all documentation may not yet have been gathered;
 2) The client has indicated they want to be housed in this project.
 3) The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time.
 • for **all other types of Service projects including but not limited to:** services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

Project: My Fake Organization PH (CoC-R10)

Household

Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household	Housing Move-in Date
<input checked="" type="checkbox"/> Dilly, Dilly	Female	30	01/07/2016	Lori Wood	Self	01/07/2016
<input checked="" type="checkbox"/> Dilly, Billy	Male	8	01/07/2016	Lori Wood	Son	

Restriction: ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Save **No Changes**

When the Update/Annual Assessment workflow is prompted, you will review case members and click **"Save"** or **"No Changes"**.

Clients ClientTrack

Client Dashboard Find Client Intake Client Profile Edit Client Address History Alias History Case Managers

Dilly Dilly 1/1/1989 SOCIAL SECURITY NUMBER 222-22-5444 CLIENT ID 354

Assessment For Enrollment (1263)

New or Update Existing
for this Client are you

New Assessment
Update Existing

The next screen will prompt you to choose **"New Assessment"** or **"Update Existing"**.

The screenshot shows the ClientTrack interface for a client named 'Dilly Daily' (1/1/1989, SOCIAL SECURITY NUMBER 222-22-5444, CLIENT ID 354). The 'Assessment For Enrollment (1263)' is being updated. The 'Type of Assessment' dropdown menu is open, showing two options: 'During Program Enrollment' and 'Annual'. The 'Annual' option is highlighted with a red box.

Next, “**Type of Assessment**” will appear and prompt you to choose “**During Program Enrollment**” or “**Annual**”. Choose “**Annual**” for the annual assessment.

HMIS UNIVERSAL DATA ASSESSMENT FOR UPDATE/ANNUAL WORKFLOW

Review the head of household’s universal data and document any changes. Please note that you can change the assessment date at the top of the screen to reflect the actual date of the assessment, if entered at another time. For “**Assessment Type**”, choose “**Annual**”. When finished updating the information, click “**Save**”.

The screenshot shows the 'Universal Data Assessment' form for the same client. The 'Assessment Date' is set to 12/12/2019, and the 'Assessment Type' is set to 'Annual'. A red arrow points to the 'Assessment Date' field. The form includes sections for 'Health Insurance' and 'Common Client Assessments'.

HMIS INCOME AND SOURCES, NON-CASH BENEFITS

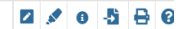
Complete the “**Income and Sources, Non-Cash Benefits**” assessment. If the client’s income/benefits have not changed, click on “**Default Last Assessment**”, then click “**Save and Close**”. If the client’s income/benefits have changed, enter the updated information, then click “**Save and Close**”.

The screenshot shows the 'Income and Sources, Non-Cash Benefits' form for the same client. The 'Assessment Date' is set to 12/12/2019, and the 'Assessment Type' is set to 'Annual'. A red arrow points to the 'Assessment Date' field. The form includes sections for 'Income and Sources' and 'Non-Cash Benefits'.

Assessment For
Enrollment
(1263)

- ☒ Enrollment
- ☒ Dilly, Dilly
- ☒ New or Update Existing
- ☒ Type of Assessment
- ☒ Annual Assessments
- ☒ Income
- ☐ Dilly, Billy

+ Income and Sources, Non-Cash Benefits



Income

<input type="checkbox"/>	Type ▲	Description ▲	Monthly Amount ▲	Restriction ?* ▲
<input type="checkbox"/>	Earned Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Self Employment	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Worker's Compensation	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Unemployment Insurance	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Pension	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Supplemental Security Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input checked="" type="checkbox"/>	Social Security Disability Income	SSDI <input type="text"/>	\$750.00	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Retirement (Social Security)	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Veteran's Pension	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Veteran's Disability Payment	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	TANF	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Child Support	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
Count/Total Monthly Income:			1	\$750.00

Non-Cash Benefits

<input type="checkbox"/>	Type ▲	Description ▲	Monthly Amount ▲	Restriction ?* ▲
<input checked="" type="checkbox"/>	Food Stamps/Money for food on benefits card	<input type="text"/>	\$50.00	Restrict to MOU/InfoRelease ▼
<input checked="" type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children	<input type="text"/>	\$150.00	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	TANF Child Care Services	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	TANF Transportation Services	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other TANF-funded Services	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Source	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
Count/Total Monthly Income:			2	\$200.00

¹ Depreciated in 2017 (HMIS v6.1)

Restriction: *

☐ Restrict to Organization ?

☒ Restrict to MOU/InfoRelease

Click **“Finish”** to end the workflow

ClientTrack

All Search

Dilly Dilly
1/1/1989

SOCIAL SECURITY NUMBER
222-22-5444

CLIENT ID
354

Assessment For Enrollment (1263)

You're done!
All required steps have been completed.

Finish
Close the workflow

HMIS Universal Data Assessment for Child at Update/Annual

After completing all the updated assessments for the head of household, you will be prompted through the assessments for all enrolled household members. The adult assessments will look like the head of household's assessments. The Update/Annual Assessment will look differently for children.

Mighty Mouse
3/3/2011

SOCIAL SECURITY NUMBER
002-00-2000

CLIENT ID
554

Assessment For Enrollment (1263)

+ Universal Data Assessment

Default Client's Last Assessment

Assessment Date: 11/22/2019
Age at Assessment: 8
Assessment Type: Annual
Assessor: Lori Wood
Program: My Fake Organization (ES - R10)

Health Insurance

Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Covered by Health Insurance: No

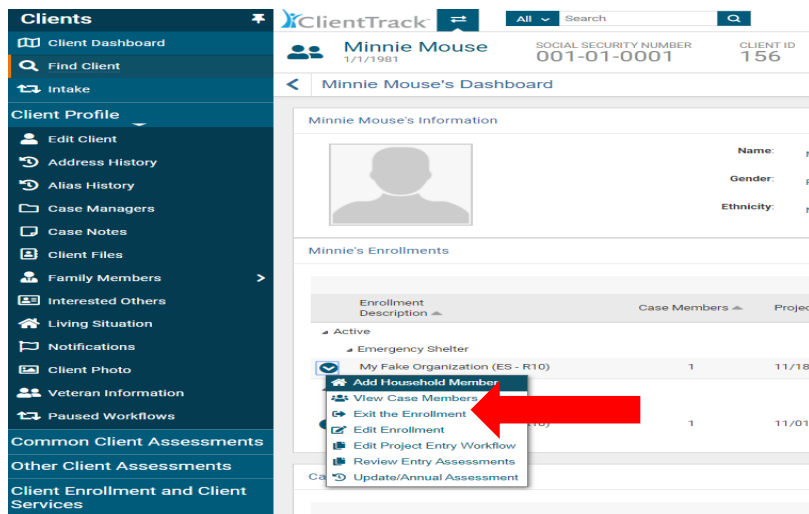
Type	Status	Reason No.	Other Coverage
Private	No	- SELECT -	
Private - Employer	No	- SELECT -	
Private - Individual	No	- SELECT -	
Medicare	No	- SELECT -	
Medicaid	No	- SELECT -	
State Children's Health Insurance Program S-CHIP	No	- SELECT -	
Military Insurance	No	- SELECT -	
Other Public	No	- SELECT -	
State Funded	No	- SELECT -	
Combined Children's Health Insurance / Medicaid Program	No	- SELECT -	
Indian Health Service (IHS)	No	- SELECT -	

Save

PROGRAM DISCHARGE

When a client has transitioned from your project or is no longer receiving services for any reason, you will discharge the client from your program in ClientTrack with the following steps:

- Go to the client record.
- Click on the blue action wheel beside your project enrollment located in the center of the client record; Select **“Exit the Enrollment”** in the drop-down list that appears after clicking on the blue action wheel; And complete the information prompted for through the Exit workflow and save as you go.



On the first screen of the exit workflow, you will be asked for the **“Exit Date,” “Destination,” “Exit Reason,”** and whether to **“End Case Assignment.”** Please note that all fields with an **asterisk *** are required.

HUD Program Exit

Enrollment Exit

To exit the client from the Enrollment, enter the Exit Date and Destination.

Exit Date: * 11/21/2019

Destination: * Rental by client, no ongoing housing subsidy

Exit Reason: Completed Program

Case Manager Assignment: Lori Wood

End Case Assignment: ☒

HMIS UNIVERSAL DATA ASSESSMENT FOR EXIT WORKFLOW

Complete the required information and click **“Save”** to continue. NOTE: If the client’s information has not changed during the enrollment period, you may click on the **“Default Client’s Last Assessment”** button which will populate the fields with the most recent client assessment information.

Minnie Mouse 1/1/1981 SOCIAL SECURITY NUMBER 001-01-0001 CLIENT ID 156

HUD Program Exit

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information.

Note:

- Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data.
- Changing any project setup data with existing enrollments may affect or break the logic for 3.917.
- 3.917 may not always show as expected because of changed setup data or missing required data links

Default Client's Last Assessment

Assessment Date: 11/21/2019
 Age at Assessment: 38
 Assessment Type: Exit
 Assessor: Lori Wood
 Program: My Fake Organization (ES - R10)

Health Insurance

Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Covered by Health Insurance: Yes

Default Last Insurance Status

Type	Status	Reason No	Other Coverage
Private	- SELECT -	- SELECT -	
Private - Employer	- SELECT -	- SELECT -	
Private - Individual	- SELECT -	- SELECT -	
Medicare	- SELECT -	- SELECT -	
Medicaid	Yes		
State Children's Health Insurance Program S-CHIP	- SELECT -	- SELECT -	
Military Insurance	- SELECT -	- SELECT -	

HMIS BARRIERS ASSESSMENT FOR EXIT WORKFLOW

You will be required to complete the HMIS Barriers Assessment at exit. The built-in logic may create additional required fields. Select a barrier by clicking on the box beside it if a barrier is present at exit. If the client has no changes in barriers since their most recent assessment, click on **"Save & Close"** in the lower right-hand corner.

Barriers

Use this form to identify whether a client has each individual barrier or not. The Client's last assessment is displayed as a default. You may, optionally, click **Previous Barriers Detail** to view information about the defaulted records or click **View Barrier History** to review all previous barriers.

View Barrier History

Assessment Active

Identified Date: 11/21/2019
 Screen: HMIS Barriers
 Disabling Condition: Yes

Barrier	Help	Barrier Present?	Condition is Indefinite	Explanation	Restriction	Previous Barrier Details
<input checked="" type="checkbox"/> Alcohol Abuse	?	No			Restrict to Organization	<input checked="" type="checkbox"/> Previous Barrier
<input checked="" type="checkbox"/> Developmental Disability	?	No			Restrict to Organization	<input checked="" type="checkbox"/> Previous Barrier
<input checked="" type="checkbox"/> Drug Abuse	?	No			Restrict to Organization	<input checked="" type="checkbox"/> Previous Barrier
<input checked="" type="checkbox"/> HIV/AIDS	?	No			Restrict to Organization	<input checked="" type="checkbox"/> Previous Barrier
<input checked="" type="checkbox"/> Mental Health	?	Yes	Yes		Restrict to Organization	<input checked="" type="checkbox"/> Previous Barrier
<input checked="" type="checkbox"/> Physical Disability	?	Yes	Yes		Restrict to Organization	<input checked="" type="checkbox"/> Previous Barrier
<input checked="" type="checkbox"/> Chronic Health Condition		Yes	Yes		Restrict to Organization	<input checked="" type="checkbox"/> Previous Barrier

INCOME AND SOURCES, NON-CASH BENEFITS FOR EXIT WORKFLOW

Complete the Financial information for the head of household at exit and document any changes to the household income. Be sure to scroll down to complete Non-Cash Benefits and click **“Save and Close”** when finished.

+ Income and Sources, Non-Cash Benefits



Indicate below the client's sources of **monthly** income, non-cash benefits and expenses.

The following instructions are quoted from the HMIS Data Manual:

- When a client has income, but does not know the exact amount, a "Yes" response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.
- Income received by or on behalf of a minor child should be recorded as part of household income under the Head of Household, unless the federal funder in the HMIS Program Specific Manual instructs otherwise. Income should be recorded at the client-level for heads of household and adult household members. Projects may choose to collect this information for all household members including minor children, as long as this does not interfere with accurate reporting per funder requirements. Projects collecting data through client interviews should ask clients whether they receive income from each of the sources listed rather than asking them to state the sources of income they receive.
- Income data should be recorded only for sources of income that are current as of the information date (i.e. have not been specifically terminated). As an example, if a client's employment has been terminated and the client has not yet secured additional employment, the response for Earned income would be "No." As a further example, if a client's most recent paycheck was 2 weeks ago from a job in which the client was working full time for \$15.00/hour, but the client is currently working 20 hours per week for \$12.00 an hour, record the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour).

Default Last Assessment

Assessment Active

Assessment Date: * 11/21/2019

Income from Any Source: * Yes

Non-Cash Benefits from Any Source: * Yes

Expenses: -- SELECT --

+ Income and Sources, Non-Cash Benefits



Income

<input type="checkbox"/>	Type ▲	Description ▲	Monthly Amount ▲	Restriction
<input type="checkbox"/>	Earned Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Self Employment	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Worker's Compensation	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Unemployment Insurance	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Pension	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Supplemental Security Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Social Security Disability Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Retirement (Social Security)	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Veteran's Pension	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Veteran's Disability Payment	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	TANF	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Child Support	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
Count/Total Monthly Income:			0	\$0.00

Definitions of Sources of Income

- **Earned Income** – Employment income
- **Self-Employment**
- **Worker’s Compensation** – Income for an individual who has been injured on the job
- **Unemployment Insurance** – Unemployment benefits from the State
- **Other Pension**– Income from a private employer or military retirement pay
- **Supplemental Security Income** – A federal program providing additional income for older and disabled individuals with little to no income stream
- **Social Security Disability Income** – A monthly compensation to individuals who can no longer work due to their medical conditions
- **Retirement (Social Security)** – Income payment provided by government for individuals who qualify
- **Veteran’s Pension**
- **Veteran’s Disability Payment**
- **TANF** –Temporary Assistance for Needy Families
- **Child Support** – Income received from one parent to another to care for children
- **Other Income** – Any income not previously listed

Non-Cash Benefits

Type	Description	Monthly Amount	Restriction
<input checked="" type="checkbox"/> Food Stamps/Money for food on benefits card		200.00	Restrict to MOU/InfoRelease
<input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants, and Children			Restrict to MOU/InfoRelease
<input type="checkbox"/> TANF Child Care Services			Restrict to MOU/InfoRelease
<input type="checkbox"/> TANF Transportation Services			Restrict to MOU/InfoRelease
<input type="checkbox"/> Other TANF-funded Services			Restrict to MOU/InfoRelease
<input type="checkbox"/> Other Source			Restrict to MOU/InfoRelease
¹ Depreciated in 2017 (HMIS v6.1)		Count/Total Monthly Income:	1 \$200.00

Restriction: ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Save and Close

Definitions of Non-Cash Benefits

- **Food Stamps/Money for Food on Benefits Card** – Monthly payments issued by the government to persons with low income that can be redeemed for food at stores.
- **Special Supplemental Nutrition Program for Women, Infants and Children (WIC)** – A program geared toward supplying nutritional food for at risk pregnant women and their families.
- **TANF Child Care Services** – Childcare funding assistance
- **Other TANF Funded Services**
- **Other Source** – Any source not previously listed

The “Exit Destination” and “Exit Reason” will be completed for all household members being discharged from the program.

HMIS UNIVERSAL DATA ASSESSMENT FOR CHILD AT EXIT

Complete the required information on the HMIS Universal Data Assessment at exit for the child and click **“Save”** to continue

Little Client 2/2/2012 SOCIAL SECURITY NUMBER 225-28-2525 CLIENT ID 3326

HUD Program Exit

- Exit Enrollment
- Exit Assessments
- Client, Another

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information.

Note:

- Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data.
- Changing any project setup data with existing enrollments may affect or break the logic for 3.917.
- 3.917 may not always show as expected because of changed setup data or missing required data links

Default Client's Last Assessment

Assessment Date: 11/21/2019
 Age at Assessment: 7
 Assessment Type: Exit
 Assessor: Lori Wood
 Program: My Fake Organization (ES - R10)

Health Insurance

Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Default Last Insurance Status

Covered by Health Insurance: Yes

Type	Status	Reason No	Other Coverage
Health insurance obtained through COBRA	No	-- SELECT --	
State Enrollment	No	-- SELECT --	

Save **No Changes**

HMIS BARRIERS ASSESSMENT FOR CHILD AT EXIT

Complete the Barriers Assessment for the child at exit. If no barriers are reported, click **“Save & Close”** to continue in the workflow.

Barriers

Use this form to identify whether a client has each individual barrier or not. The Client's last assessment is displayed as a default. You may, optionally, click **Previous Barriers Detail** to view information about the defaulted records or click **View Barrier History** to review all previous barriers.

View Barrier History

Assessment Active

Identified Date: 11/21/2019
 Screen: HMIS Barriers
 Disabling Condition: Yes

Barrier	Help	Barrier Present?	Condition is Indefinite	Explanation	Restriction	Previous Barrier Details
Alcohol Abuse	?	No			Restrict to Organization	Previous Barrier
Developmental Disability	?	Yes			Restrict to Organization	Previous Barrier
Drug Abuse	?	No			Restrict to Organization	Previous Barrier
HIV/AIDS	?	No			Restrict to Organization	Previous Barrier
Mental Health	?	No			Restrict to Organization	Previous Barrier
Physical Disability	?	No			Restrict to Organization	Previous Barrier
Chronic Health Condition	?	No			Restrict to Organization	Previous Barrier

COMPLETING THE EXIT WORKFLOW

When you have completed all exit assessment for all household members, you will be asked to finish the exit workflow. Click **“Finish”** to complete the discharge for your clients.

Little Client
2/2/2012

SOCIAL SECURITY NUMBER
225-28-2525

CLIENT ID
3326

HUD Program Exit

- Exit Enrollment
- Exit Assessments
- Client, Another

You're done!
All required steps have been completed.

Finish
Close the workflow

You will then return to the client dashboard where you can see the project exit dates now as see below. If you have also selected **“End Case Assignment”** on the exit workflow, you will see that your status has changed to **“Inactive”** on the client dashboard under **“Case Manager Assignments.”** If you forgot to click on the box beside **“End Case Assignment”** during the exit workflow, you can click on the little pencil beside your name under **“Case Manager”** to edit your status to **“Inactive”** to remove the discharged client from your case load.

Little Client
2/2/2012

SOCIAL SECURITY NUMBER
225-28-2525

CLIENT ID
3326

[Little Client's Dashboard](#)
Little Client's Information

Name: Client, Little
Gender: Male
Ethnicity: Non-Hispanic/Latino

Birth Date: 2/2/2012 12:00:00 AM
Race: Asian, Black or African American, White

Age: 7
Veteran:

Little's Enrollments

1 result found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination	Last Assessed
Exited Emergency Shelter My Fake Organization (ES - R10)	2	11/21/2019		11/21/2019	5082	5084	Rental by client, no ongo...	11/21/2019

Case Manager Assignments

1 result found.

Case Manager	Begin Date	Status	End Date	Enrollment
Lori Wood	11/21/2019	Inactive	11/21/2019	My Fake Organization (ES - R10)

Unique Program Requirements at Exit

There are variations in data requirements for different program exits. Below are screenshots of the unique discharge requirements during the exit workflow for the following programs:

1. PATH
2. HOPWA
3. RHY

1. PATH AT EXIT

The screenshot shows the 'HUD Program Exit' workflow for a client named 'Happy Friday' (DOB: 3/3/1989, SSN: 222-55-4444, Client ID: 3329). The 'Exit Assessments' step is active. The 'Connection with SOAR' section requires indicating the connection with SOAR for the client. The 'Assessment Active' status is shown. The 'Assessment Date' is set to 11/22/2019. The 'Connection with SOAR' dropdown is set to '-- SELECT --'. The 'Restriction' is set to 'Restrict to MOU/InfoRelease'.

Enter the **Current Living Situation** information for the client and click “**Save**” to proceed in the exit workflow. This will conclude the PATH specific data requirements for a client at exit.

The screenshot shows the 'HUD Program Exit' workflow for the same client, now at the 'Current Living Situation' step. The 'Current Living Situation' section requires recording the client's current living situation information. The 'Current Living Situation' dropdown is set to 'Place not meant for habitation'. The 'Location Detail' field is empty. The 'Record Contact' checkbox is checked. The 'Contact Service Information' section requires recording the contact service information. The 'Contact Service' dropdown is set to 'PATH - Contact'. The 'Location' dropdown is set to 'My Fake Organization'. The 'Use Geolocation' checkbox is unchecked. The 'Comments' field is empty. The 'Restriction' is set to 'Restrict to MOU/InfoRelease'.

2. HOPWA AT EXIT

Happy Friday

3/3/1989

SOCIAL SECURITY NUMBER

222-55-4444

CLIENT ID

3329

HUD Program Exit

Exit Enrollment

Exit Assessments

Barriers / Special Needs

Medical Assistance

T-Cell Count/Viral Load

Income

Housing Assessment at Exit

Assistance Assessment

The medical assistance assessment is primarily used to determine whether HIV positive clients are accessing medical assistance benefits for which they may be eligible. Medical assistance data is required for clients with HIV/AIDS who are enrolled in a HOPWA-funded program.

Default Client's Last Assessment

Assessment Active

Assessment Date: 11/22/2019

Search

Medical Assistance Type	Status	Reason No (if applicable)	Restriction
<input checked="" type="checkbox"/> Receiving Public HIV/AIDS Medical Assistance	Yes		Restrict to MOU/InfoRelease
<input checked="" type="checkbox"/> Receiving AIDS Drug Assistance Program (ADAP)	Yes		Restrict to MOU/InfoRelease

Happy Friday

3/3/1989

SOCIAL SECURITY NUMBER

222-55-4444

CLIENT ID

3329

HUD Program Exit

Exit Enrollment

Exit Assessments

Barriers / Special Needs

Medical Assistance

T-Cell Count/Viral Load

Income

Housing Assessment at Exit

+ T-cell/Viral Measurements

This data, as is all HIV/AIDS data, is confidential, covered under special law, and may not be shared without the expressed consent of the client. Providing the information is completely voluntary on the client's part and failure to report (i.e. client doesn't know or client refused) will not be considered in data quality for either the CoC or the HOPWA program.

Assessment Active

Assessment Date: 11/22/2019

T-cell (CD4) Count Available: -- SELECT --

Viral Load Available: -- SELECT --

Date	Measurement	Value	How was the data obtained	Restriction
	Viral Load			Restrict to MOU/InfoRelease
	T-cell Count			Restrict to MOU/InfoRelease

Restriction:

☐ Restrict to Organization
 ☒ Restrict to MOU/InfoRelease

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Happy Friday 3/3/1989 SOCIAL SECURITY NUMBER 222-55-4444 CLIENT ID 3329

HUD Program Exit

- Exit Enrollment
- Exit Assessments
- Barriers / Special Needs
- Medical Assistance
- T-Cell Count/Viral Load
- Income
- Housing Assessment at Exit

+ Housing Assessment

Use this form to collect the client's housing assessment disposition at exit.

Assessment Active

Assessment Date: * 11/22/2019

Housing Assessment at Exit: * Moved to new housing unit

Subsidy For New: * With on-going subsidy

Restriction: * ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

3. RHY AT EXIT

In addition to the standard exit assessments, RHY clients will complete the following exit assessments:

- Employment Assessment
- Health Assessment
- Project Completion and Actions Assessment

1/1/2003 1/1/2003 **Enrollment** SOCIAL SECURITY NUMBER 111-88-7788 CLIENT ID 3330

HUD Program Exit

- Exit Enrollment
- Exit Assessments
- Barriers / Special Needs
- Income
- Employment
- Child Education
- Health
- RHY Exit Assessment
- Counseling Assessment

+ HMIS 2017 Employment Assessment

Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week prior to assessment, looking for work.

Assessment Active

Assessment Date: * 11/22/2019

Employed? * Yes

Type of Employment: * Full-Time

Restriction: * ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Default Client's Last Assessment

Rhy Enrollment 1/1/2003 SOCIAL SECURITY NUMBER 111-88-7788 CLIENT ID 3330

HUD Program Exit

- Exit Enrollment
- Exit Assessments
- Barriers / Special Needs
- Income
- Employment
- Child Education
- Health
- RHY Exit Assessment

+ Health Assessment

Select the appropriate general health status. If the client is female, you will need to select the appropriate pregnancy status. If the client is pregnant, you will need to select the appropriate pregnancy status.

[Default Client's Last Assessment](#)

Assessment Active

Assessment Date: * 11/22/2019

General Health Status: * --SELECT--

Dental Health Status: * --SELECT--

Mental Health Status: * --SELECT--

Restriction: * ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

RHY Exit Assessment – The built-in logic will require additional information depending on the client’s responses. To move forward on this assessment, click all the **“Actions”** and change the default **“Action Status”** to **“Yes”** for those follow up items accomplished. Click **“Save”** to complete the workflow.

Rhy Enrollment 1/1/2003 SOCIAL SECURITY NUMBER 111-88-7788 CLIENT ID 3330

HUD Program Exit

- Exit Enrollment
- Exit Assessments
- Barriers / Special Needs
- Income
- Employment
- Child Education
- Health
- RHY Exit Assessment
- Counseling Assessment
- Safe and Appropriate Exit

+ RHY Exit Assessment

Use this assessment to collect RHY required data related to a client's exit from a RHY funded program. This assessment should be used in an exit workflow.

Assessment Active

Assessment Date: * 11/22/2019

Project Completion Status: * Completed project

Commercial Sexual Exploitation/Sex Trafficking

Ever received anything in exchange for sex (e.g. money, food, drugs, shelter): * No

Labor Exploitation/Trafficking

Ever afraid to quit/leave work due to threats of violence to yourself, family, or friends: * No

Ever promised work where work or payment different than you expected: * No

Restriction: * ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Counseling Assessment – To be collected at exit for all adults and heads of household.

Rhy Enrollment 1/1/2003 SOCIAL SECURITY NUMBER 111-88-7788 CLIENT ID 3330

HUD Program Exit

- Exit Enrollment
- Exit Assessments
- Barriers / Special Needs
- Income
- Employment
- Child Education
- Health
- RHY Exit Assessment
- Counseling Assessment
- Safe and Appropriate Exit

+ Counseling Assessment

Counseling Assessment - to be collected at exit for all adults and heads of household.

Default Client's Last Assessment ⓘ

Assessment Active

Pre-Exit

Assessment Date: * 11/22/2019

Counseling received by client: * Yes

Type(s) of Counseling Received: * ☒ Individual ☐ Family ☐ Group - including peer counseling

Number of sessions received by exit: * 12

Total number of sessions planned in youth's treatment or service plan: 5

Post-Exit

A plan is in place to start or continue counseling after exit: * Yes

Restriction: * ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

Safe and Appropriate Exit Assessment – Complete the information related to the selected client's safe and appropriate exit assessment and other relevant information.

Rhy Enrollment 1/1/2003 SOCIAL SECURITY NUMBER 111-88-7788 CLIENT ID 3330

HUD Program Exit

- Exit Enrollment
- Exit Assessments
- Barriers / Special Needs
- Income
- Employment
- Child Education
- Health
- RHY Exit Assessment
- Counseling Assessment
- Safe and Appropriate Exit

+ Safe and Appropriate Exit

Complete the information below related to the selected client's safe and appropriate exit assessment and other relevant information.

Default Client's Last Assessment ⓘ

Assessment Active

Assessment Date: * 11/22/2019

Exit destination safe - as determined by client: * Yes

Exit destination safe - as determined by the project/caseworker: * Yes

Client has permanent positive adult connections outside of project: * No

Client has permanent positive peer connections outside of project: * Yes

Client has permanent positive community connections outside of project: * Yes

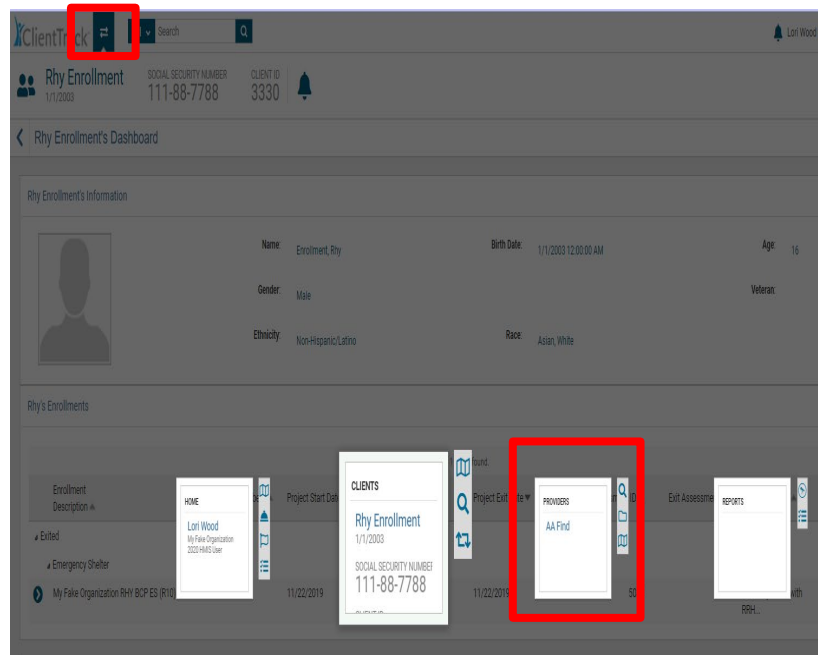
Restriction: * ☐ Restrict to Organization ☒ Restrict to MOU/InfoRelease

MANAGING PROVIDERS

You can add providers (other agencies) you work with into a database to easily identify providers on services and/or referrals.

Follow these steps to add a provider to your database of providers:

- Click on the blue box with the white arrows beside the ClientTrack logo at the top of the screen to toggle to the “Providers” screen.
- Conduct a search for the Provider in the database by clicking on the “Find Provider” link in the upper left-hand corner of the screen.



- Click on the “Add New Provider” link if the Provider is not already in the system located below the “Find Provider” link in the upper left-hand corner

 This screenshot shows the 'Add New Provider' form in ClientTrack. The left sidebar contains a 'Providers' menu with 'Find Provider' and 'Add New Provider' links. The 'Add New Provider' link is highlighted in a red box. The main form area is titled 'Provider Setup' and contains several sections: 'Provider Information' with fields for Provider Name, Provider Type, Address, Address 2, City, State, Zip Code, Phone, Website Address, and Account; 'Accessing Organizations' with a checkbox for 'All Organizations'; 'Mailing Address' with fields for Mailing Address, Mail Address 2, and Mail Zip Code; and 'Time Available' with fields for Hours Available and Days Available. The form is designed to collect detailed information about a new provider.

- Complete the provider information. You must complete information that has an asterisk * before continuing.
- Click “Next” in the bottom right-hand corner of the screen.

- Complete “Referral Contact” information.

- Click on “Finish” to complete the addition of a Provider to your searchable list. You can go back to the previous screen, if necessary, by clicking on “Previous.”

After adding the provider to the provider database through the above steps, ***you need to complete one more step before you can access the provider when setting up referrals and services.*** You must correlate a service with the provider before the provider is available for services and referrals on a client record. You can do this by remaining on the provider record and clicking on “Services” in the list of Menu Items under “Provider” found on the left-hand side of the screen as seen below. Click on the “Add Provider Service” button on the right-hand side of the screen.

Then select a service you want correlated with the provider and click **“Save”** to add the service to the provider record. You can add as many services as you would like by repeating these steps.

Once you have finished this final step, you will be able to select the provider when creating a referral or service on a client record.

The screenshot shows the ClientTrack interface. On the left is a sidebar with a 'Providers' menu. The main area is titled 'Helpful Hearts' and '+ Provider Services Setup'. It contains a text box for 'Provider Services' and a form for adding a service. The 'Service' dropdown is set to 'Housing Offer - Other Permanent Housing Subsidy'. There is a 'Notes' text area and a 'Preference' section with radio buttons for 'No Preference' (selected) and 'Preferred'.

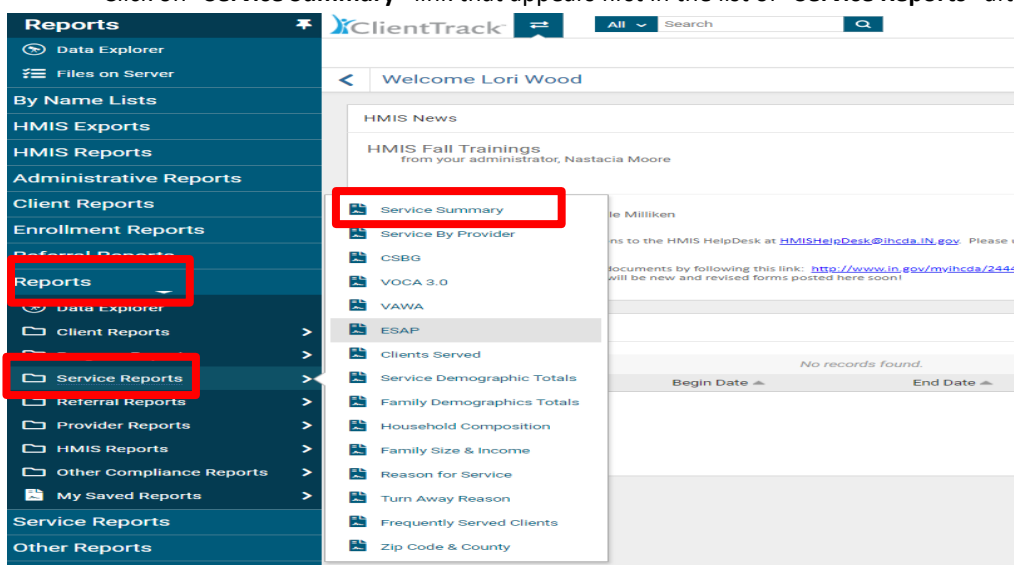
BASIC REPORTS

SERVICE SUMMARY REPORT

The Service Summary Report is a report of the services your agency has provided for clients enrolled in a specific program. You can run a Service Summary Report a variety of ways to extract specific service information from client records, for example services rendered in the month of December or Case Management Services provided for the year, etc. Most often the Service Summary Report is used to submit for reimbursement.

To Run a Service Summary Report:

- Click on **“Reports”** found in the floating menu where **“Home,” “Client,” “Providers”** and **“Reports”** are displayed. (Navigate to the floating menu by clicking on the **double arrow icon** to the right of the **ClientTrack Logo** at the top left of the screen)
- Click on **“Reports”** found in the list of menu options on the left-hand side of the screen. Another list of reports should appear as you hover on the **“Service Reports”** option.
- Click on **“Service Summary”** link that appears first in the list of **“Service Reports”** after hovering over it.



- Set up your report parameters by: *(Please note that all fields with an asterisk * are required fields)*
 - Complete the date range** – There are a couple of options for setting the date range. You can select from the **“Predefined Date Range,”** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **“Between.”** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2016 and 12/31/2016. This will give you all the clients in your program for the entire year of 2016.
 - Filter by “Programs”** – Select the **“Program”** you want to run a Service Summary for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a program. You can run multiple programs on the same report. Simply select more than one **“Program”** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To deselect a program, simply click on it again and you will see the green check mark disappear.
 - Filter by “Grants”** – Select the **“Grant”** you want to run the report for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. However, your grant options will be dictated by the **“Program(s)”** you selected in the **“Filter by Program(s)”** box. If more than one grant appears, simply select more than one **“Grant”** by clicking on the name in the box. To deselect one, simply click on it again and you will see the green check mark disappear.
 - Filter by Services, User(s), Housing Status, Results by Age, State(s), Counties, Zip Code(s) and more** – Select a variety of parameters to extract more specific service data from clients your organization has served. Most of these selections will allow you to select more than one option in the box. Again, simply click on the option in the box and a green check mark will appear. To deselect an option, click on it again and you will see the green check mark disappear.

Reports

ClientTrack

Service Summary Report

To use saved report settings, select the desired settings description. To save the settings for a new report, select **Save Settings**, type the description of the settings in the **Save As** field, select the report settings, and run the report. The saved settings will appear in the list the next time you access this screen.

Saved Report Settings: -- SELECT --

Date Range

Indicate the time period for this report. Only records that fall within the date range you select will be included.

Predefined Date Range: Current Month

Service Date Between: 11/01/2019 and 11/30/2019

Organization(s)

Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. Note: The list only shows organizations you are authorized to view.

Organization(s): 4 County, A Hand Up, ACTION Inc of Delaware County, Affordable Housing Corporation of Marion, Aging & Community Services of South Cent, AIDS Ministries

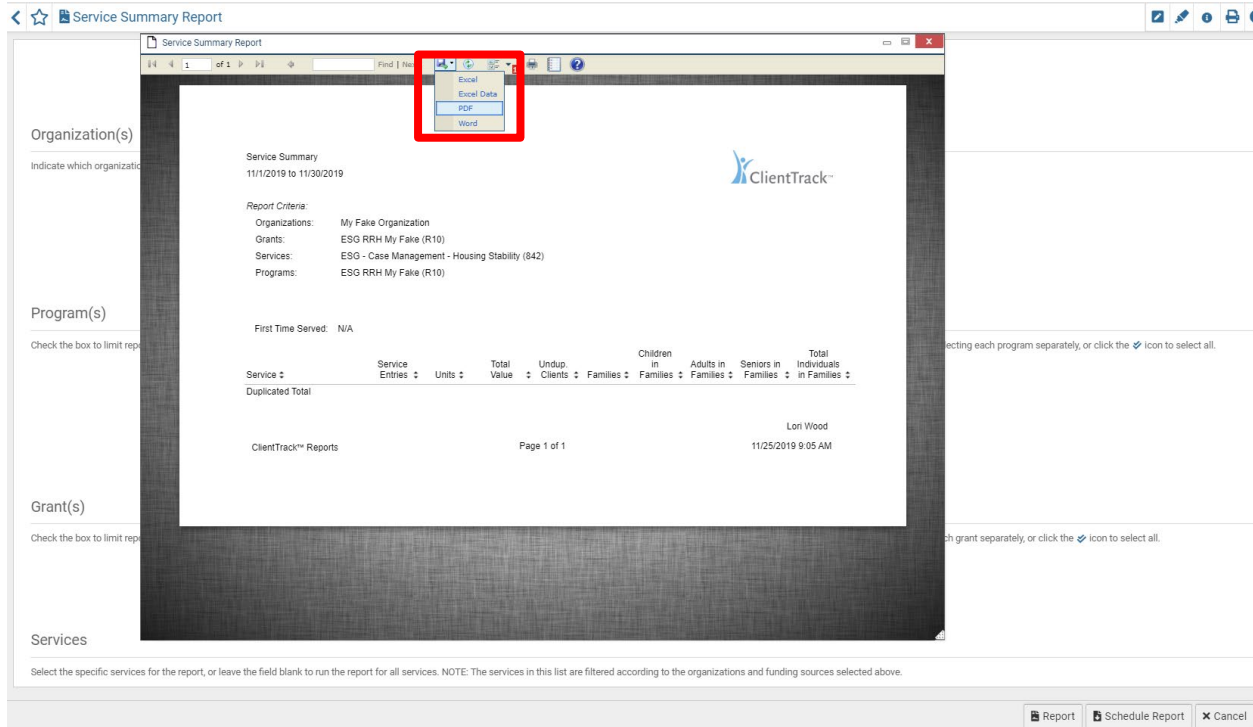
Program(s)

Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the icon to select all.

Program(s): ☒ Filter by Program(s), ESG Prevention My Fake (R10), ESG RSH My Fake (R10), HOPWA STRUK, LIHEAP prevention, My Fake IHODA Coordinated Entry (R1), My Fake Cig Prevention (ESG - R10)

Grant(s)

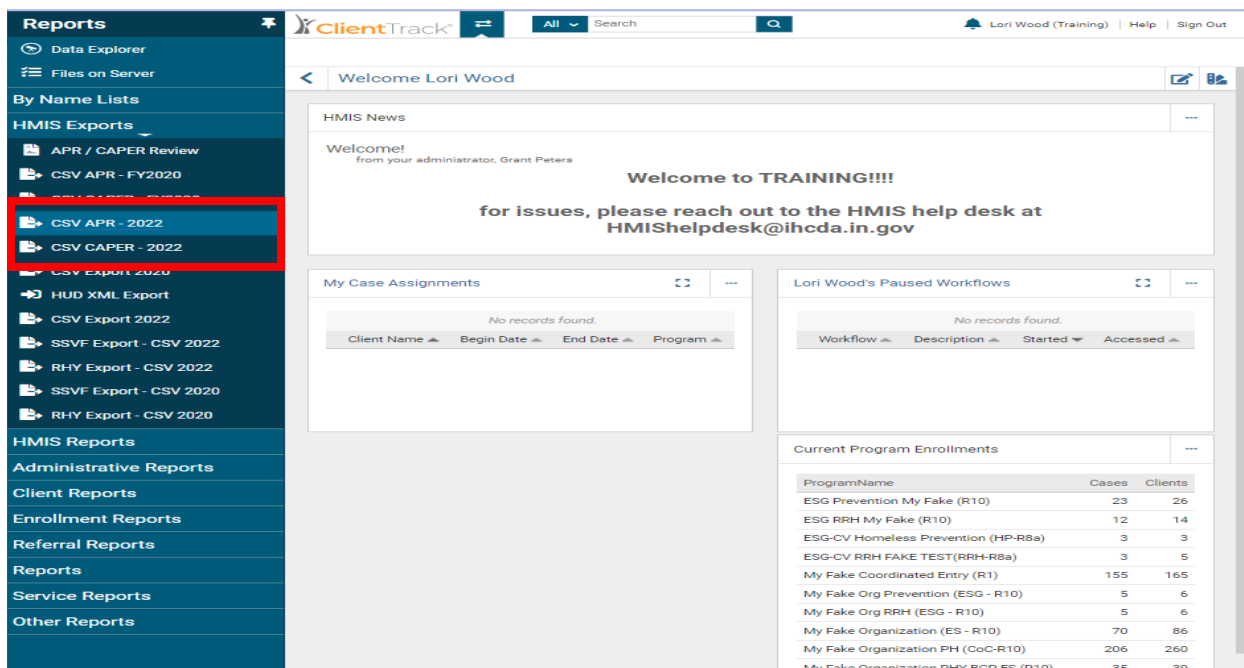
- Click on the **“Report”** button found in the bottom right-hand corner of the screen. You should see your Service Summary Report pop up in a new window within seconds. You can export your report to a pdf file for email transmission or record-keeping by clicking on the PDF icon located in the menu at the top of the page. (Click on the floppy disc and the save options appear in a drop-down list. Excel, Excel Data, PDF, and Word) Click on PDF



ANNUAL PERFORMANCE REPORT (APR) AND CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT (CAPER)

Running the Export

1. From the “Reports” workspace, select the “HMIS Exports” option on the left-hand side of the screen.
 - a. Click on “CSV CAPER - 2022” to run the CAPER
 - b. Click on “CSV APR – 2022” to run the APR

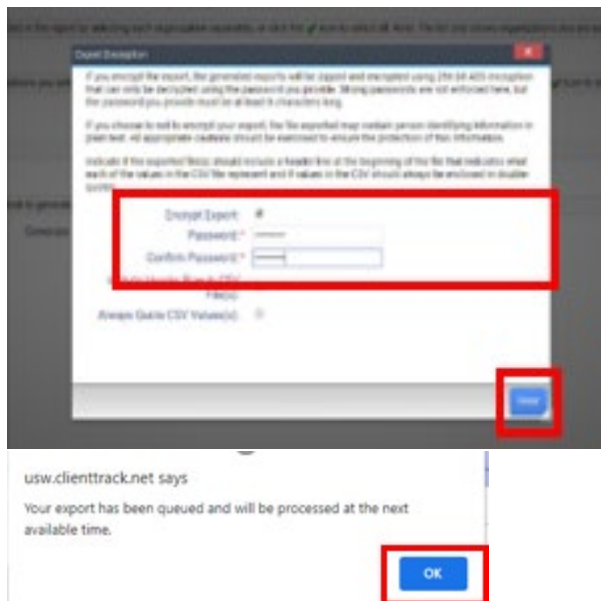


-
- CSV CAPER - HMIS 2022 Standard**
- Please note that multiple project and project type support is only intended for cases where multiple projects is required for APR submission. For example, a grant with multiple sub-recipients that enter data into multiple projects. Additional projects will affect performance and should only be used when necessary for compliance.
- The report will return data based on the combination of all parameters you set. For example, if you choose Organizations "Agency 1" and "Agency 2" and Project "PSn 123" the report will only include states employed in PSn 123 by Agency 1 or Agency 2.
- ### Saved Report Settings
- To use previously saved report settings, select the desired settings description. To save the current report settings, select Save Settings, type a description of the settings in the Save As field, select the report criteria, and run the report. The saved settings will appear in the list the next time you access this screen.
- Saved Report Settings: SELECT
- ### Date Range
- Indicate the time period for his report. Only records that fall within the date range you select will be included.
- Date Range List: Since This Date, Last Year
- Begin Date: 11/05/2020 To: 11/05/2021
- ### Organization
- Indicate which organizations should be included in the report by selecting each organization separately, or click the all icon to select all. Note: The list only shows organizations you are authorized to view. Only enrollments created by the Organizations selected here will be included in the export.
- Organization: all
- 4 County
 - 4 Hand Up
 - ACTION Inc. of Delaware County
 - Affordable Housing Corporation of Marion
 - Aging & Community Services of South Cent
 - ADRS Ministries

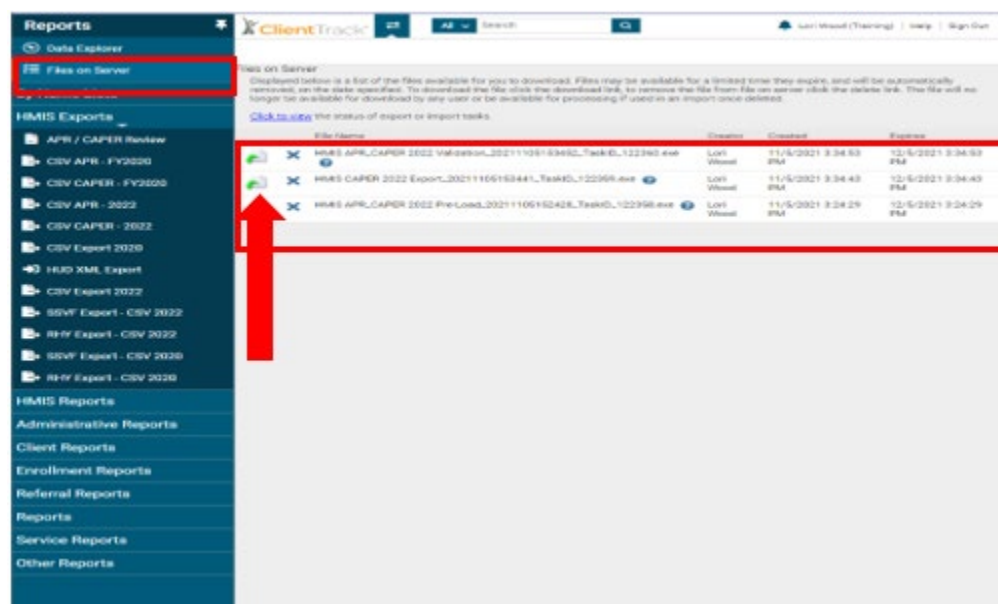
- ## Accessing Export Files & Report Preparation

55

3. A pop-up will appear “Your export has been queued and will be processed at the next available time.” Click “OK”



4. **NOTE:** It takes approximately 20 – 30 minutes for the report to load. To check the status of your report, click “Files on Server”.



5. The report is ready once three separate files are displayed as indicated in the screenshot below. The following files will appear on the “Files on Server” screen once your report is ready.

a. For CAPERs:

- **HMIS APR CAPER 2022 Validation file**
- **HMIS CAPER 2022 Export file**
- **HMIS APR CAPER 2022 Pre-Load file**

b. For APRs:

- **HMIS APR CAPER 2022 Validation file**
- **HMIS APR 2022 Export file**
- **HMIS APR CAPER 2022 Pre-Load file**

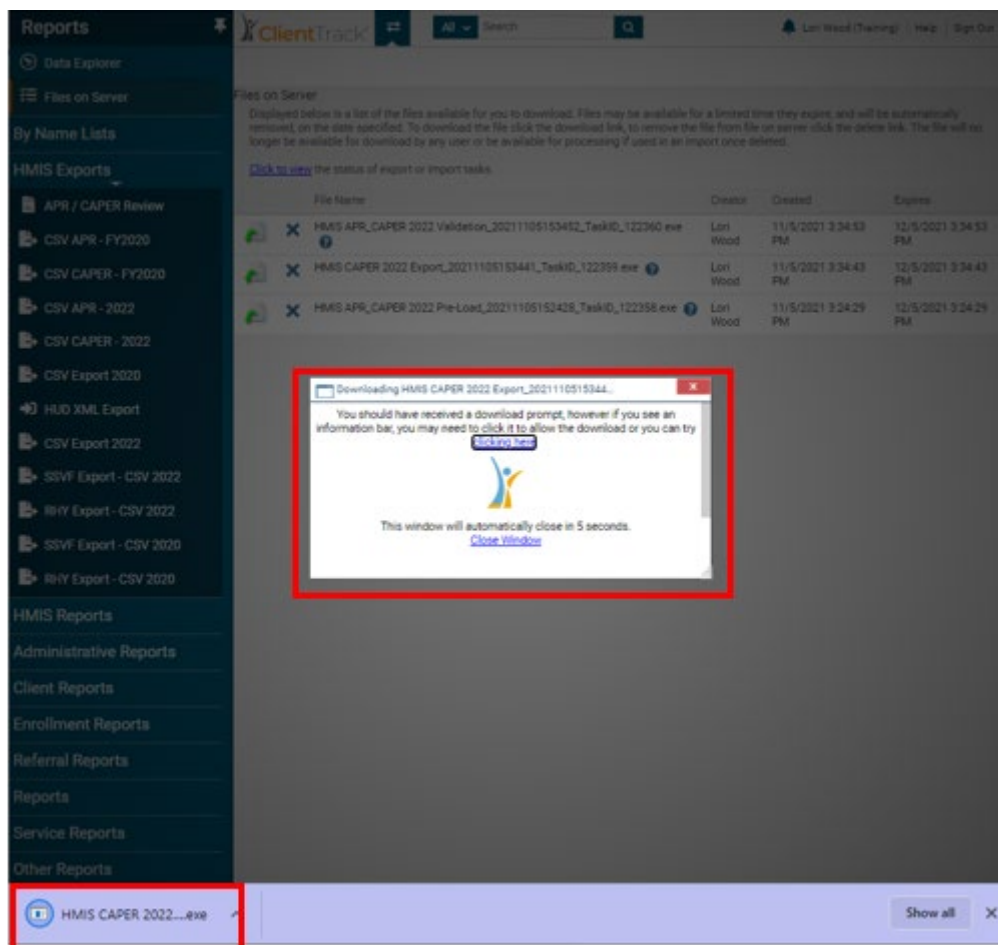
- Next, click on the **“Green download arrow”** located to the left of the **“HMIS CAPER 2022 Export”** file if running a CAPER. Click on **“HMIS APR 2022 Export”** file if running an APR

CAPER: You will download, compress, and upload the “HMIS CAPER 2022 Export” file to SAGE.

APR: You will download, compress, and upload the “HMIS APR 2022 Export” file to SAGE.

IMPORTANT NOTE: SAGE WILL NOT ACCEPT THE “VALIDATION OR PRE-LOAD” FILE. YOU MUST DOWNLOAD, ZIP (COMPRESS), THEN UPLOAD THE “EXPORT FILE” IN SAGE.

- After selecting the **“Green download arrow”** to the left of the **“HMIS CAPER 2022 Export”** file or **“HMIS APR 2022 Export”** file, your screen will display the window shown below. The downloaded file is now visible in the lower left corner of the screen. Right click on the file and select **“Open or Open when done”**

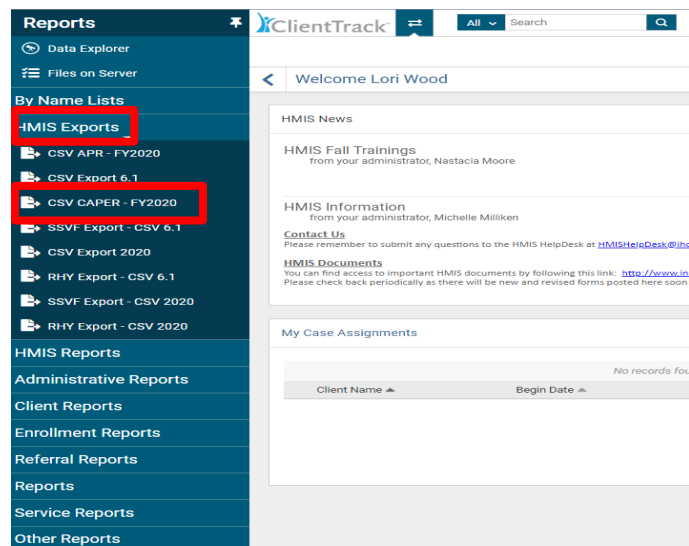


CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT (CAPER)

The CAPER is a comprehensive report of your ESG program – who you served and how you served them. Here are quick steps to running the report and viewing the data:

To Run a CAPER

- On the “**Reports**” workspace, click on “**HMIS Exports**”.
- Next, select “**CSV CAPER – FY2020**” found in the list below “**HMIS Exports**” on the left-hand side of the screen.



- Set up your report parameters by: *(Please note that all fields with an asterisk * are required fields)*
- **Complete the date range** – There are a couple of options for setting the date range. You can select from the “**Predefined Date Range**,” though this may not provide you the exact dates you need. You can fill in the dates found below this labeled “**Between**.” The first date box is the beginning date, and the second date box is the ending date, for example, 01/01/2016 and 12/31/2016. This will give you all the clients in your program for the entire year of 2016.
- **Select the “Grant Program” and “Grant Program Component”** - Select the grant associated with your program with the drop down for “**Grant Program**.” This will prompt the next selection in “**Grant Program Component**.” If you do not know this information, feel free to try several selections to find the correct options for your program. You won’t break it by choosing different options. If you do not see the correct set up information here, contact the HMIS Help Desk by emailing HMISHelpDesk@ihcda.IN.gov
- **Select the “Grant(s)”** – You may see several options to choose from after selecting “**Grant Program**” and “**Grant Program Component**.” Again, the Grant Program and Grant Program Component will determine the options you see in this box. Select the “**Grant**” you want to run the CAPER for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. Simply select more than one “**Grant**” by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To deselect one, simply click on it again and you will see the green check mark disappear.
- **Select the “Project Type”**- Select a project type with the drop-down list that appears. You may only select one “Project Type” at a time. Please note that Project Type and Program must be selected to populate the final measurement on Q.36 of the report. You can run your report without selecting “Project Type” and “Program,” but the measurement on the last page will not populate data.
- **Filter by “Program(s)”** - Click on the name in the box and a green check mark will appear to show that you have successfully selected it. Multiple programs can be selected here as well like the “Grant” parameter. You can deselect a program by clicking on it again and the green check mark will disappear.

- Click on the **“Run Export”** button found in the bottom right-hand corner of the screen. You should see your report pop up in a new window within seconds.

Reports

ClientTrack

CSV CAPER - FY2020

Please note that multiple project and program type support is only intended for cases where multiple programs is required for APR submission. For example, a grant with multiple sub-recipients that enter data into multiple projects. Additional programs will affect performance and should only be used when necessary for compliance.

The export will return data based on the combination of all parameters you set. For example, if you choose Organizations "Agency 1" and "Agency 2" the report will only include clients enrolled in PSH 123 by Agency 1 or Agency 2.

Date Range

Indicate the time period for his report. Only records that fall within the date range you select will be included.

Date Range List:

Begin Date: 11/26/2018 to 11/26/2019

Organization

Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. Note: The list only shows organizations you are authorized to view. Only enrollments created by the Organizations selected here will be included in the report.

Organization:

Grant Program

Use the Grant Program and Grant Component drop-down selections to narrow down the list of Grants.

Grant Program:

Grant Component:

Grant(s)

This list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting each grant separately, or click the icon to select all. Use the Grants filter to narrow down the list of projects for your export.

Grant(s):

☒ ESS RPH My Fair (R10)

☒ My Fair Org RPH (ESS - R10)

Program

A list of programs based on the grant selected.

Program Type:

Program:

☒ ESS RPH My Fair (R10)

☒ My Fair Org RPH (ESS - R10)

Validation File

Checking this box will generate a separate task to generate a validation file once the file export task has completed. This will not affect the running of or delay the main export.

Generate Validation File: ☐

Run Export

Enter a password in the **“Password”** box to run the report then enter the password again in the **“Confirm Password”** box then click **“Done”**. Next, a pop-up window will appear stating **“Your export has been queued and will be processed at the next available time.”** Click **“OK”**

- Retrieving the Export: The export runs in the background, so you can still use ClientTrack while it is running. Generally speaking, the download is ready in 10-15 minutes.
 - Select **“Files on Server”** on the **“Reports”** workspace on the left-hand side of the screen.
 - Click the download icon to download your report to your local PC
 - Find the report on your PC and double click it to run the report

Reports

ClientTrack

Files on Server

Files on Server

Displayed below is a list of the files available for you to download. Files may be available for a limited time they expire, and will be automatically removed, on the date specified. To download the file click the download link, to remove the file from file on server click the delete link. The file will no longer be available for download by any user or be available for processing if used in an import once deleted.

[Click to view](#) the status of export or import tasks.

File Name	Creator	Created	Expires
HMIS_CAPER_2020_Validation_20191126135316.exe	Lori Wood	11/26/2019 1:53:17 PM	12/26/2019 1:53:17 PM
HMIS_CAPER_2020_Export_20191125154305.exe	Lori Wood	11/26/2019 1:53:11 PM	12/26/2019 1:53:11 PM
HMIS_CAPER_2020_Pref-Load_20191126134303.exe	Lori Wood	11/26/2019 1:43:04 PM	12/26/2019 1:43:04 PM
HMIS_CAPER_2020_Validation_20191125154345.exe	Lori Wood	11/25/2019 3:43:46 PM	12/25/2019 3:43:46 PM
HMIS_CAPER_2020_Export_20191125154306.exe	Lori Wood	11/25/2019 3:43:38 PM	12/25/2019 3:43:38 PM
HMIS_CAPER_2020_Pref-Load_20191125153305.exe	Lori Wood	11/25/2019 3:33:06 PM	12/25/2019 3:33:06 PM
HMIS_CSV_6.1_Export_20191108142901.exe	Lori Wood	11/8/2019 2:29:01 PM	12/8/2019 2:29:01 PM

New Assessments PH Projects Only

HEALTH ASSESSMENT (PH PROJECTS ONLY)

The “**Assessment Date**” is pre-filled with today’s date. Select “**Save**” in the bottom right corner.

The screenshot shows the 'Health Assessment' form for a client named 'Purple Flower' (2/2/1956). The form includes a sidebar with navigation links: Basic Client Information, Family Members, Program Enrollment, Purple Flower, New Assessment, Barriers / Special Needs, Domestic Violence, Income, Health, and Well-being Assessment. The main form area has a header with the client's name, social security number (456-45-6456), and client ID (3376). Below this, there's a section for 'Assessment Active' with a date field set to 10/07/2021 and a restriction dropdown set to 'Restrict to MOU/InfoRelease'. A 'Save' button is located at the bottom right.

HMIS WELL-BEING ASSESSMENT (PH PROJECTS ONLY)

The screenshot shows the 'HMIS Well-Being Assessment' form for the same client. The sidebar is similar, but the 'Well-being Assessment' link is highlighted. The main form area has a header with the client's name, social security number, and client ID. Below this, there's a section for 'Assessment Active' with a date field set to 10/07/2021 and a restriction dropdown set to 'Restrict to MOU/InfoRelease'. The form contains several questions with radio button options: 'Client perceives their life has value and worth', 'Client perceives they have support from others who will listen to problems', 'Client perceives they have a tendency to bounce back after hard times', and 'Client's frequency of feeling nervous, tense, worried, frustrated, or afraid'. A 'Save' button is located at the bottom right.

- Assessment Date
- Client perceives their life has value and worth
- Client perceives they have support from others who will listen to problems
- Client perceives they have a tendency to bounce back after hard times
 - Strongly Agree
 - Somewhat Disagree
 - Neither Agree nor Disagree
 - Somewhat Agree

- Strongly Agree
 - Client Doesn't Know
 - Client Refused
 - Data Not Collected
- Client's frequency of feeling nervous, tense, worried, frustrated, or afraid
 - Not at all
 - Once a month
 - Several times a month
 - Several times a week
 - At least every day
 - Client Doesn't Know
 - Client Refused
 - Data Not Collected