Revised: November 2022

Indiana Housing & Community Development Authority

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:

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- Managing providers

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

CONTACTS

HMIS TEAM MEMBERS

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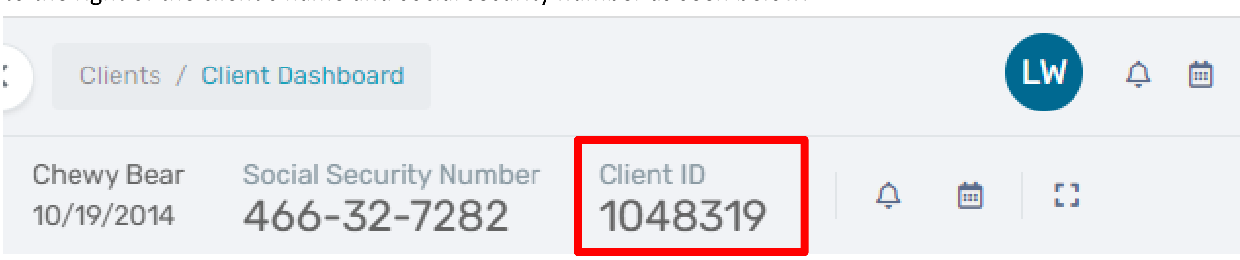
HMIS HELP DESK

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 social security number as seen below.



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

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 IHCDA 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:

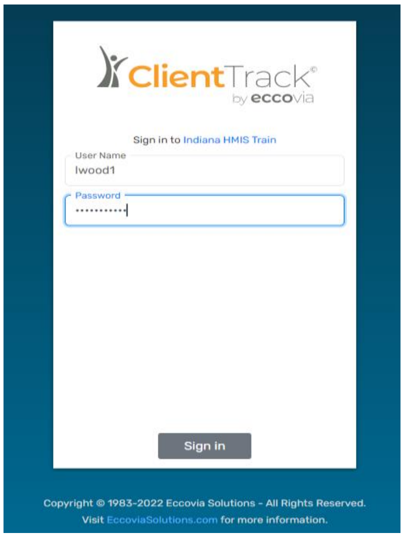
- At least one number
- Between 8 and 12 characters
- At least one non-letter, non-numeric character (!#@$)
- At least one capital letter

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 IHCDA staff will assist you.

LOGGING INTO THE SYSTEM

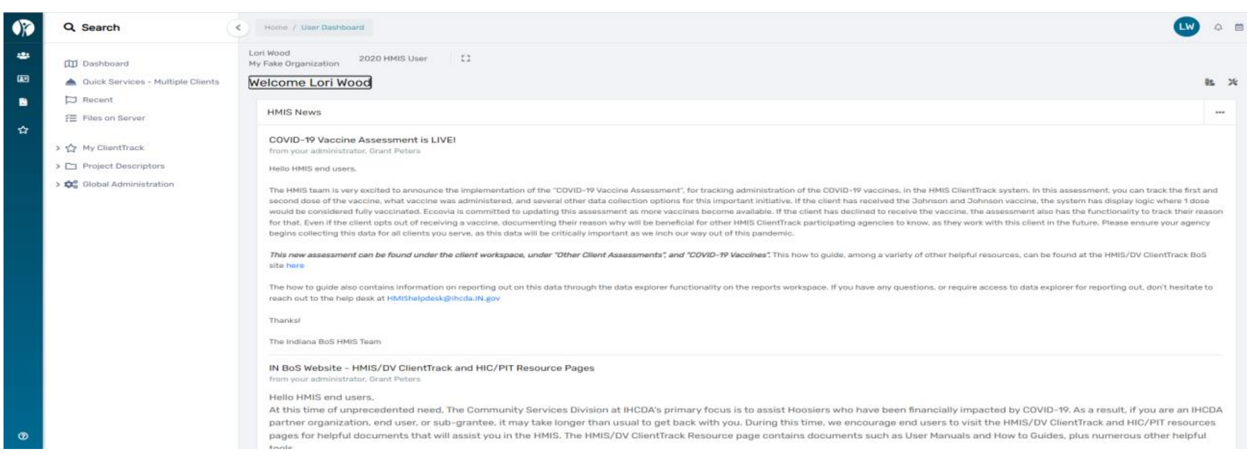
ClientTrack is a web-based application, and you will need to use an internet browser to access it. ClientTrack works with Google Chrome, Mobile Safari, and Mozilla's Firefox. Some older versions of these web browsers can cause unique issues in ClientTrack. We recommend that you work with your IT personnel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



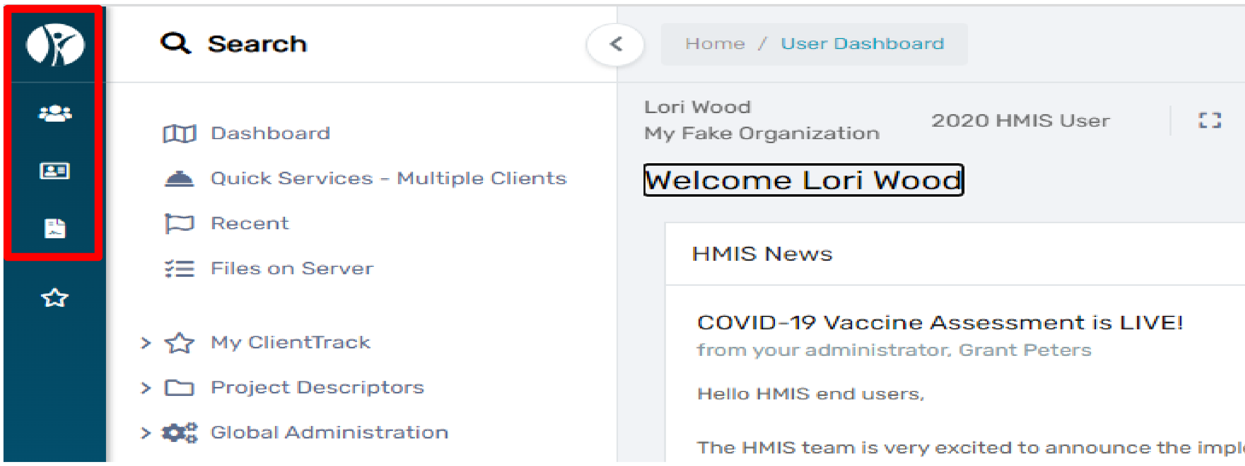
USER DASHBOARD

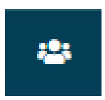
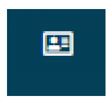
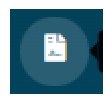
You will be directed to your **User Dashboard** on the **"Home"** screen when logging in to HMIS for the very first time. Following your initial log in, the system will open and display your most recently accessed workspace. The "Home" screen/workspace is where users are notified of important **"HMIS News"** items IHCDA wishes to communicate (i.e., upcoming trainings, changes etc.).



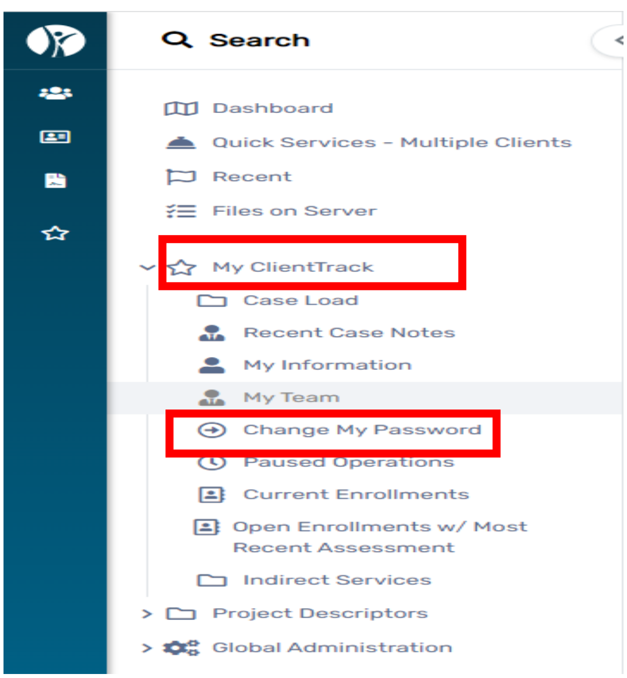
OVERVIEW OF CLIENTTRACK FEATURES

You can access any of the four workspaces, **"Home," "Clients," "Providers," or "Reports"** which provide different features for managing your cases, by clicking on the appropriate icon located on the left side of the screen outlined with the red box below.



 **HOME**  **CLIENTS**  **PROVIDERS**  **REPORTS**

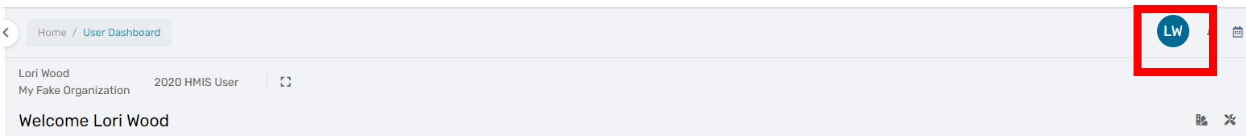
After clicking on that icon, you will see the four boxes appear labeled, **"Home," "Clients," "Providers", and "Reports"** and you can toggle between them by clicking on the appropriate box to take you to that section of ClientTrack as seen below.

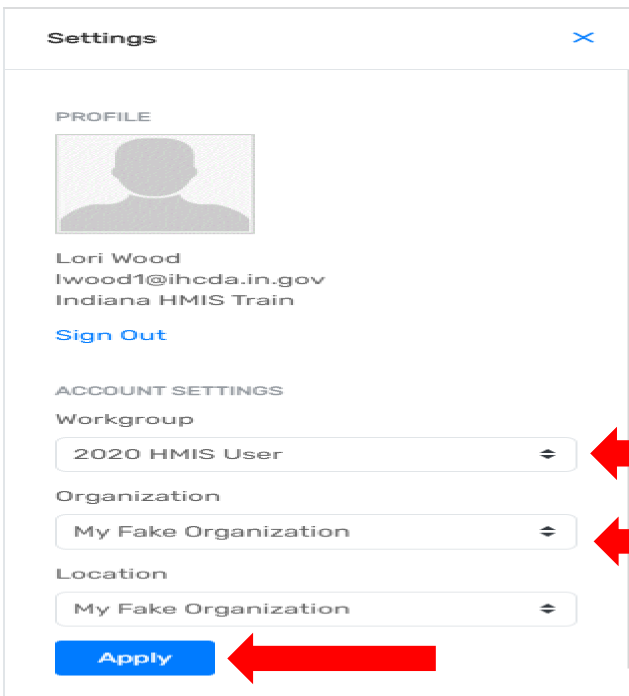


On the **"Home"** workspace there is also a list of **Menu Items** that give you easy access to your current case assignments, case notes, and more under **"My ClientTrack."**

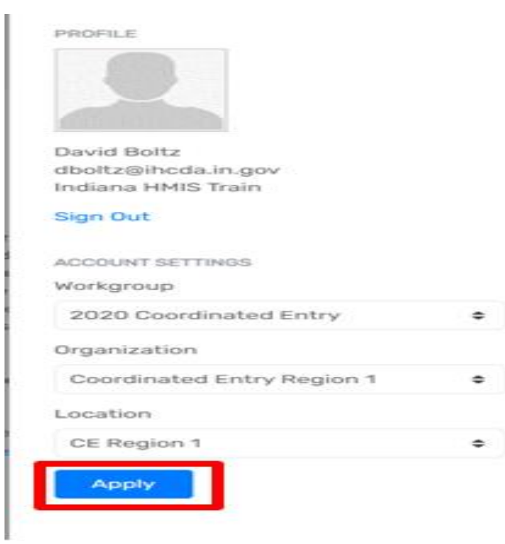
You can also change your password with the **"Change My Password"** link by clicking on **"My ClientTrack."** All these tools are designed to maximize your time and grant you easy access to your cases.

If you have access to more than one workgroup, you can click on your initials displayed in the upper right-hand corner of the screen as outlined above to change the workgroup and organization. The **"Sign Out"** link is in this same location as well. **Please be sure to "Sign Out" any time you leave your computer to ensure security of client data.**

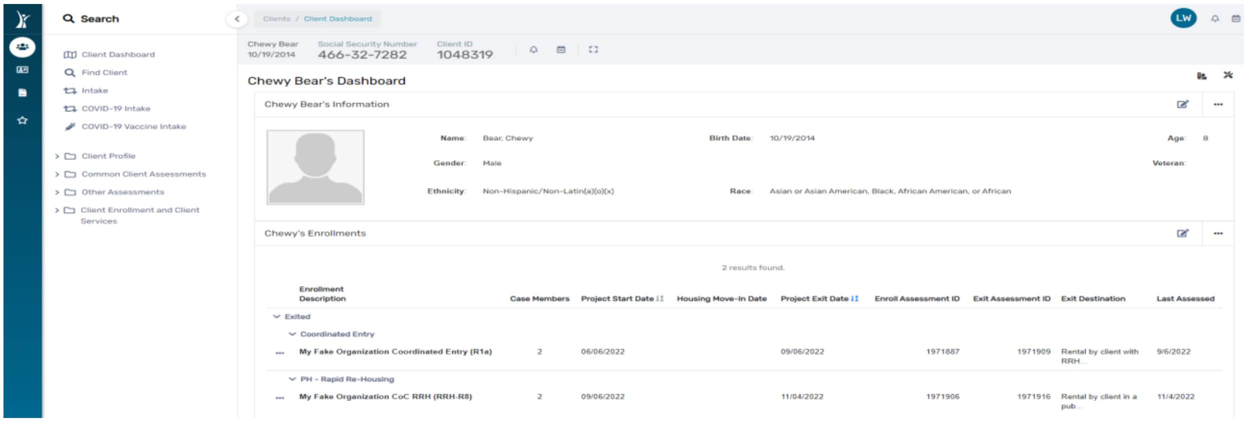




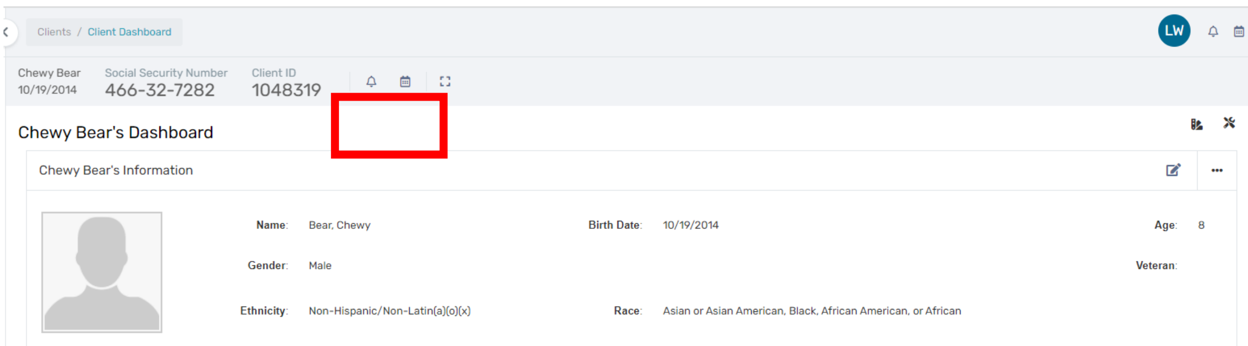
1. Next, to change the ***Workgroup*** and ***Organization***, click on the drop down for each and select the option then click **"Apply"**. ***(This is how you will change the workgroup and organization to access the "Coordinated Entry" Workgroup and "Coordinated Entry Region #" Organization in HMIS)***



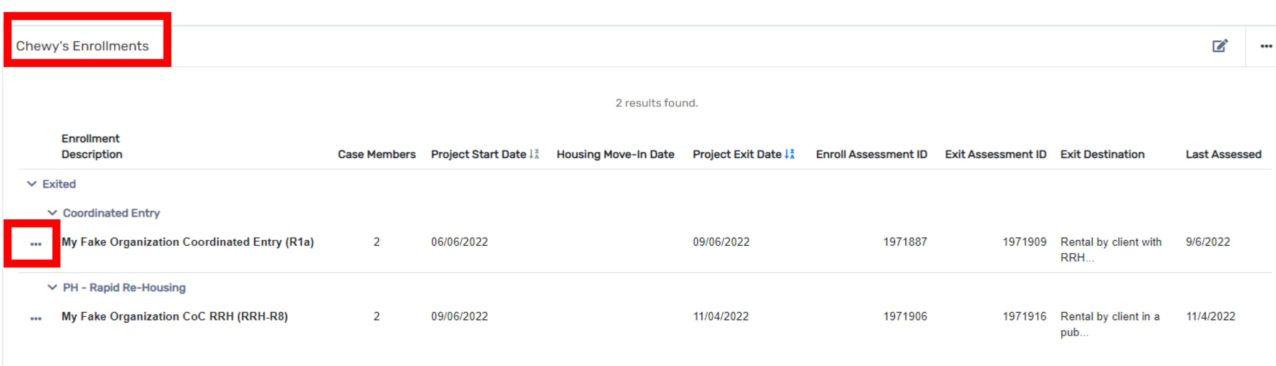
The Client Dashboard is divided up into sections with case management tools on the left-hand side of the record to help you easily find client information and manage program enrollments, services, case notes, and more. Here is a review of the client record:



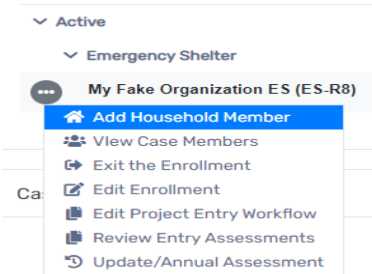
At the very top of the client dashboard, you will see the client's "Basic Information" and demographics. You can find the client ID number at the top of the client record, which is automatically assigned to the record when created.



In the center of the client dashboard, you will see all the client's past and present **program enrollments**.



Select the icon with three dots located to the left of the enrollment(s)  to easily manage your program enrollment. When you click on the icon, 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)

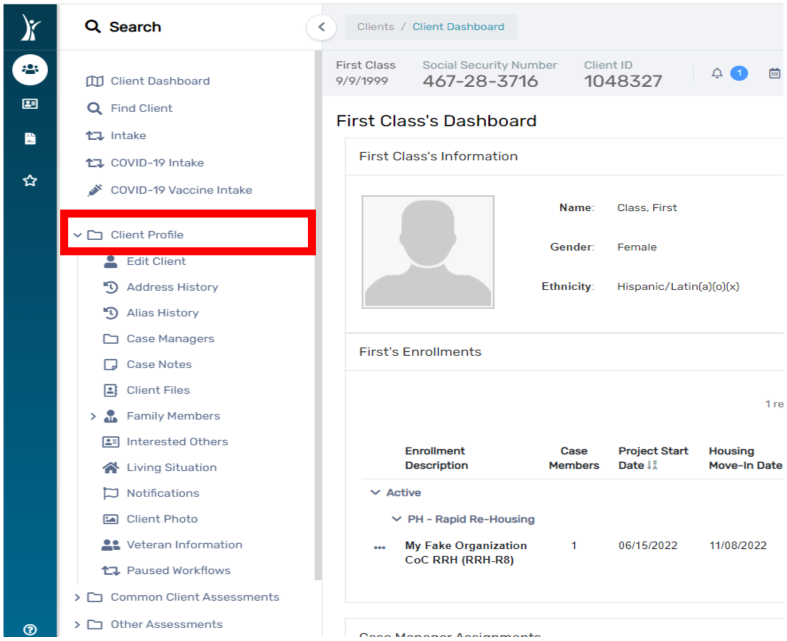
Review Entry Assessments – Use this feature to review and/or make changes to Entry workflow

Update/Annual Assessment – Use this feature to create a new **"Update Assessment"** record OR to create a new **"Annual Assessment"** (Annual Assessments are required for all clients enrolled in a project for one year or more.)

1. **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.
2. **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.

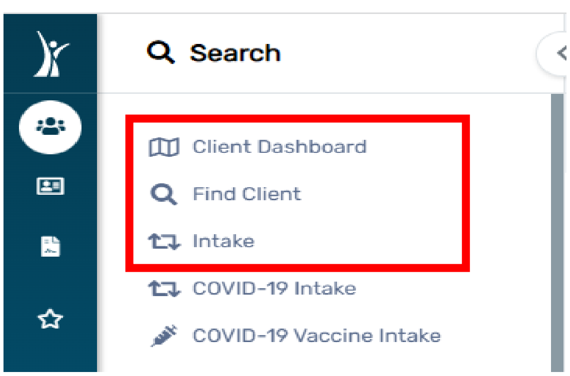


The following information outlines the features and tools found on the client record, and to access some of these features, you must click on the heading located on the left-hand side of the client record to cause another list of tools to appear as seen below:

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.

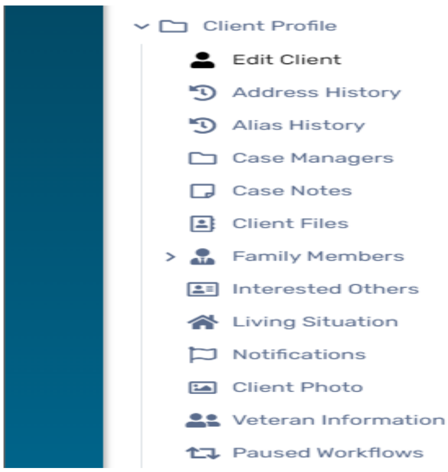
Case Notes – To create and review case notes.

Family Members – To review household members.

Client Photo – this feature allows you to upload a photo to the client's file

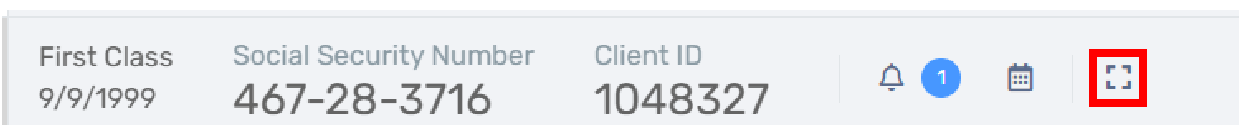
Veteran Information – Allows you to collect and enter data about the veteran's service

Paused Workflows – To resume a workflow you previously paused.

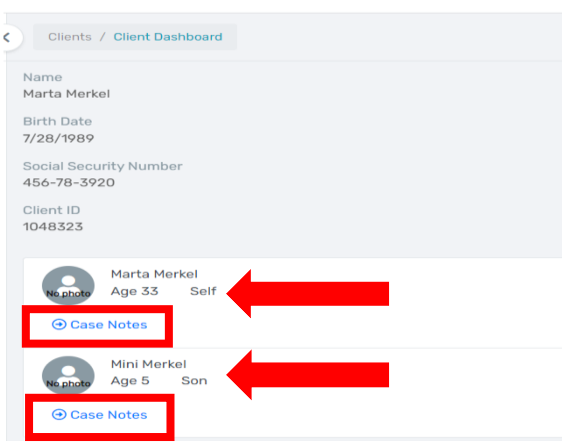


HOUSEHOLD MEMBERS

You can view household members and their client records by clicking on the **Expand**  to the right of the Client ID#.



A window will appear with all the current household members. You can click on the names of the household members to go directly to his/her client record.



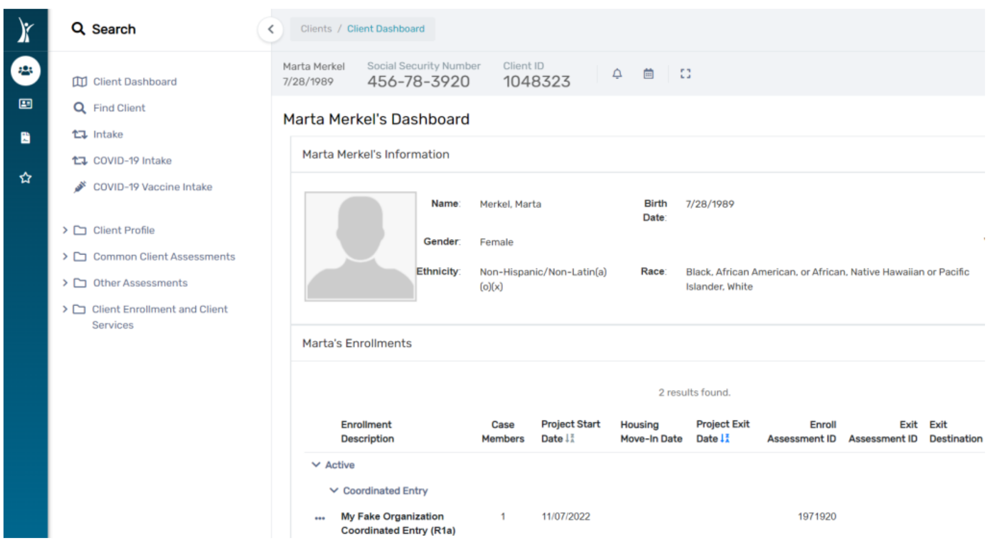
You can also add a case note for any of the associated household members by click on the **"Case Notes"** function below the client's name. You will then be taken to the **"Add New Case Note"** screen where you can enter your case note.

NOTIFICATIONS

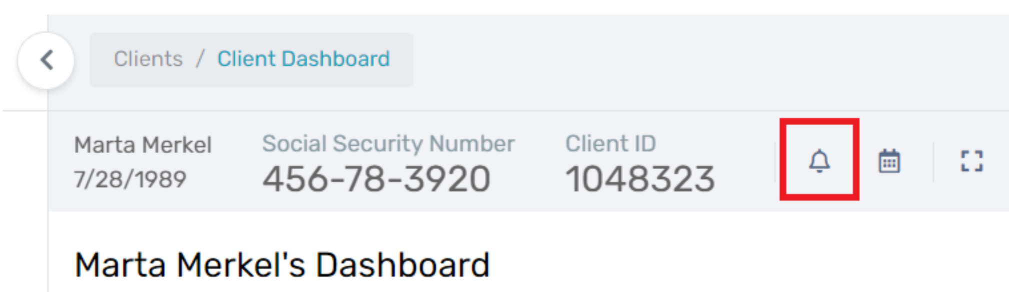
The **"Notifications"** feature in HMIS and DV ClientTrack can be used to set up **"Notifications and "Reminder Alerts"** in a client's file **OR** under your user profile in HMIS or DV ClientTrack OR both. This function is especially helpful for assisting agencies with the timely completion of **"Annual Assessments"** and can also be used for setting up other reminders for case management meetings, groups, and appointments for the client.

"An Income and Sources Assessment must be created as part of an Annual Assessment ***for clients participating in a project one year or more****, even if there is no change in either the income or sources. 'Information Date' for those records must reflect the date of the data collection, which must be* ***no more than 30 days before or after the anniversary of the head of household's Project Start Date****. Annual assessments are based solely on the head of household's anniversary date. The annual assessment must include updating both the head of household's record and any other family members at the same time. If a client's income information was recorded incorrectly at project start, update, assessment, or exit, correct the existing record, rather than adding an "update" record." (****2022 HMIS Data Standards page 112****)*

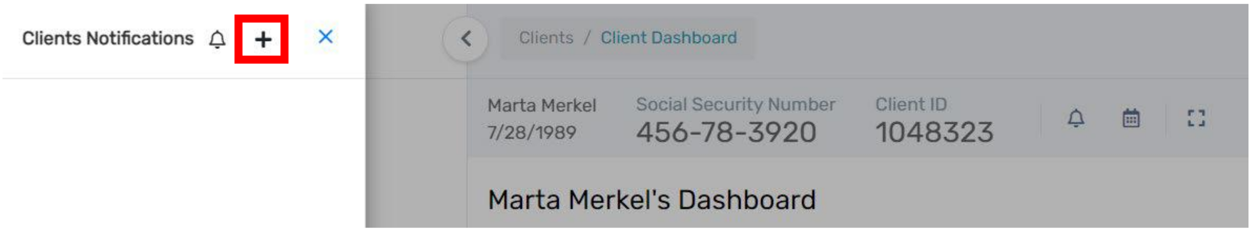
To create a **"Notification/Alert"** in a client's file, go to the client's dashboard. Setting up a **"Notification/Alert"** in a client's file means the **"Notification/Alert"** will only be visible when you are logged in to *that specific client's record*.



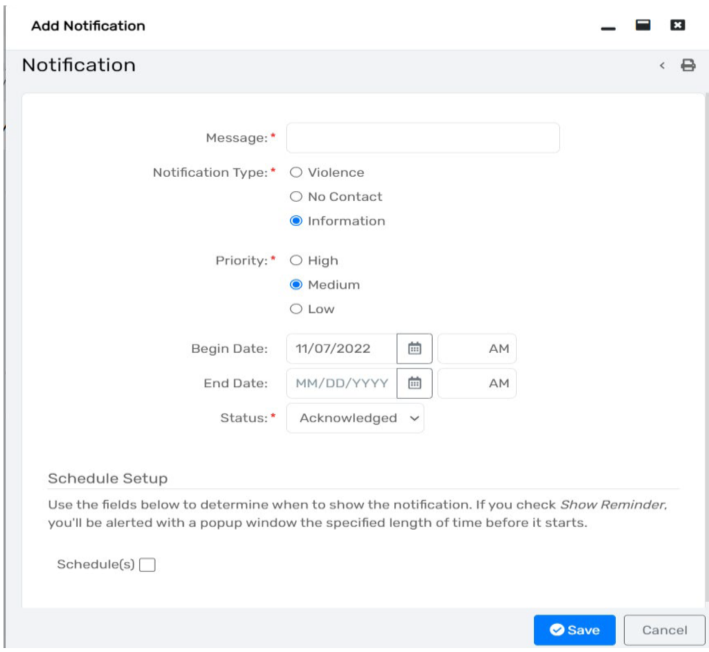
1. Next, click on the **"Bell"** icon located to the right of the Client ID# at the top of the page



2. A window will appear as seen in the screenshot below.



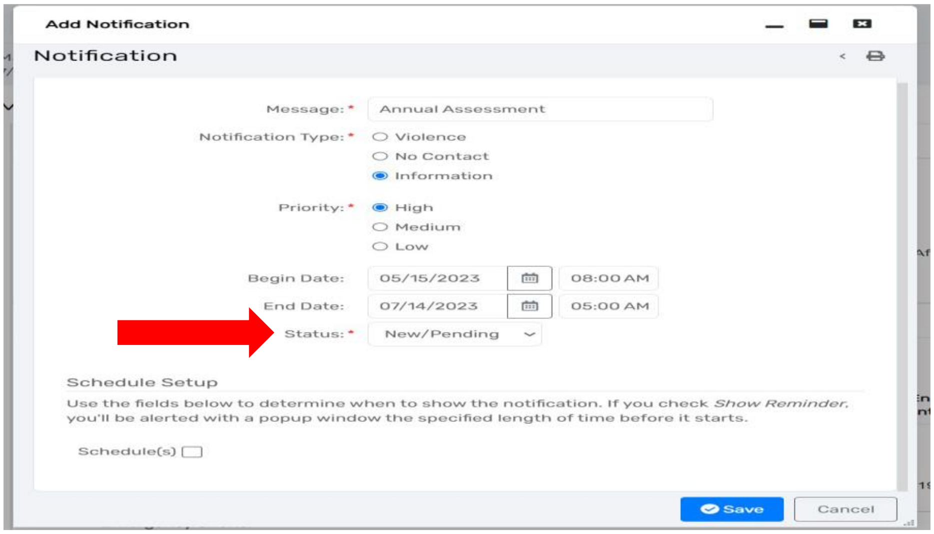
3. Click on (+) for Add Notification
4. An additional window will appear as seen in the screenshot below.



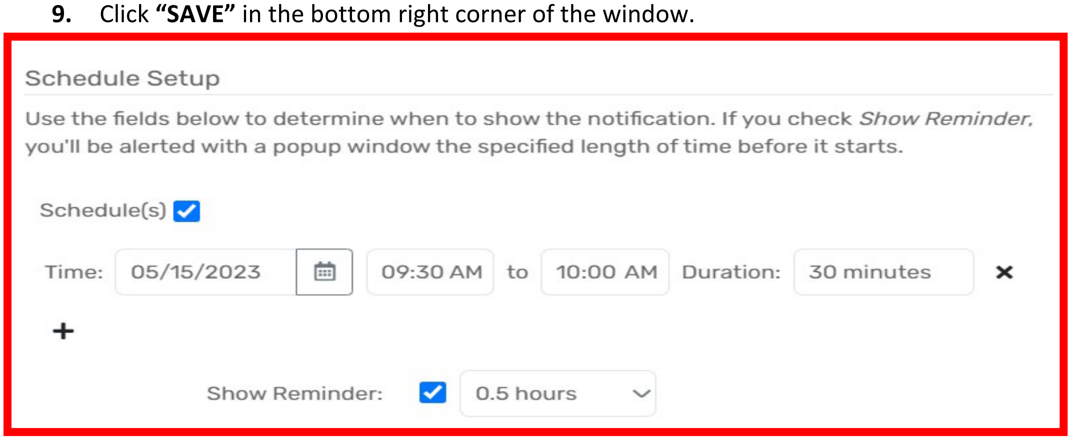
1. In the **"Message"** field, type the title of the **"Notification"** (*Annual Assessment, etc.*)
2. Select the **"Notification Type"** (*Violence, No Contact, or Information*)
3. Select the **"Priority"** from the drop-down menu (*High, Medium, or Low*)
4. Type in the **"Begin Date"** and time (*AM or PM*) then type in the **"End Date"** and time (*AM or PM*) The **"Begin Date"** should be the date you would like for the system to begin sending you alerts on the Notification. For example, a **"Notification/Alert"** for an **"Annual Assessment"** should have a **"Begin Date"** of 30 days prior to the client's 12-month anniversary of the client's **"Project Start Date"**. The **"End Date"** for the **"Notification/Alert"** should be 30 days following the 12-month anniversary of the client's **"Project Start Date"**. Please remember to allow for months with 30, 31 or 28/29 days when calculating this 60-day HUD required time frame for completing the **"Annual Assessment"**.

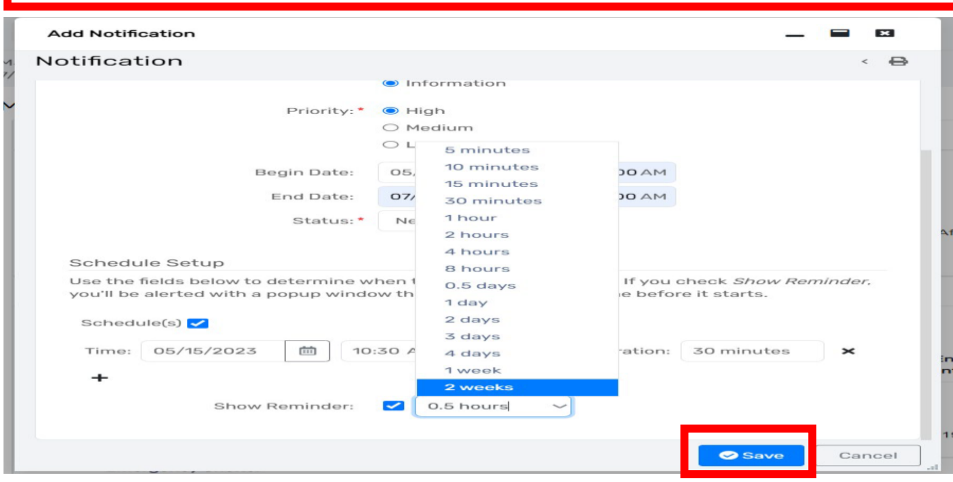
*The HMIS Data Quality Plan encourages sub-recipients to complete the required **"Annual Assessment" using a 30-day window**. This will ensure the assessment is completed within the HUD required 60-day window. This change was implemented due to the 60-day calculation errors when the window has both 30- and 31-day months. (Along with February which may have 28 or 29 days depending on Leap Year) By implementing a 30-day window for completing the required **"Annual Assessment"**, sub-recipients will know they have met the HUD required timeframe for the Annual Assessment. If you have questions regarding the HMIS Data Quality Plan, please email your respective helpdesk for assistance.*

5. Select the **"Status"** from the drop-down menu (*New/Pending, Acknowledged, Complete, or Canceled*) Always select **"New/Pending"** when setting up a new **"Notification/Alert"**.



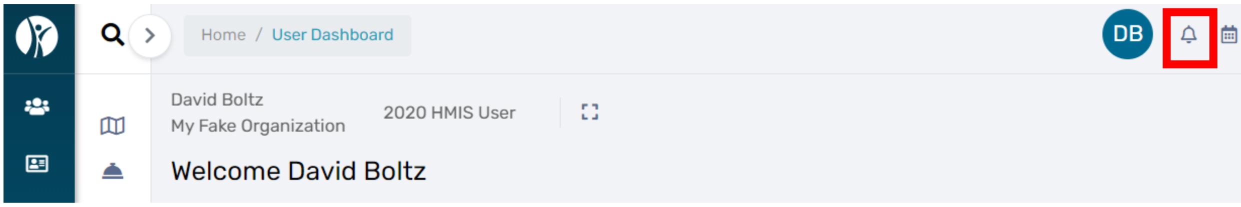
6. Next, scroll down to the **"Schedule Setup"** section of the pop-up box and click the **"Schedule(s)"** checkbox.
7. The **"Alert"** will begin popping up on the client's record on the **"Begin Date"** you previously entered. You can change the time in the **"Alert"** fields along with the **"Duration"** of the **"Alert"** field.
8. Click the **"Show Reminder"** drop-down to select how often you would like the **"Alert"** to pop-up on your screen.
9. Click **"SAVE"** in the bottom right corner of the window.





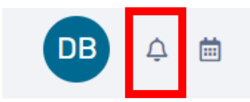
You have successfully added a **"Notification/Alert"** in the client's HMIS or DV ClientTrack file. The system will begin displaying a reminder alert (window) on the **"Begin Date"** entered for the Notification.

To create a "Notification/Alert" under your user profile, go to the upper right corner of the screen.

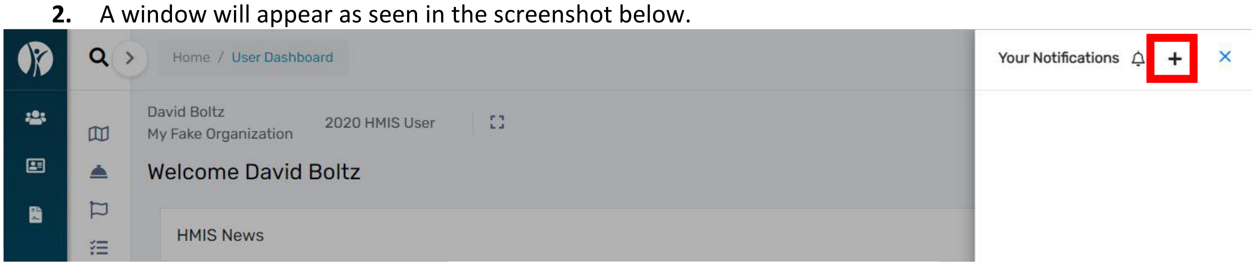


Creating the **"Notification/Alert"** under your user profile will ensure the **"Notification/Alert"** appears as a reminder no matter what Client record you are working in or viewing in the system. Whereas, creating the **"Notification/Alert"** under the Client's record will only allow the reminder to appear when you are logged into that specific Client's record. We recommend setting up the **"Notification/Alert"** *under both the **Client's** record **AND your user profile***.

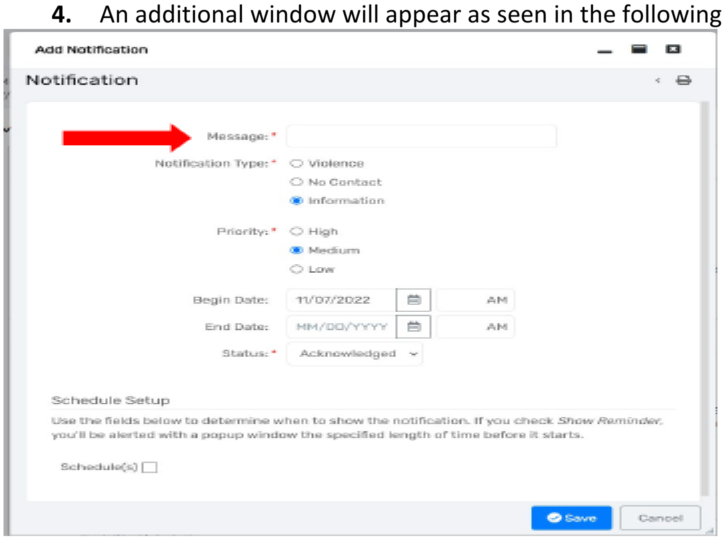
1. Next, click on the **"Bell"** icon located upper right corner of the screen to the right of your initials as displayed below.



2. A window will appear as seen in the screenshot below.



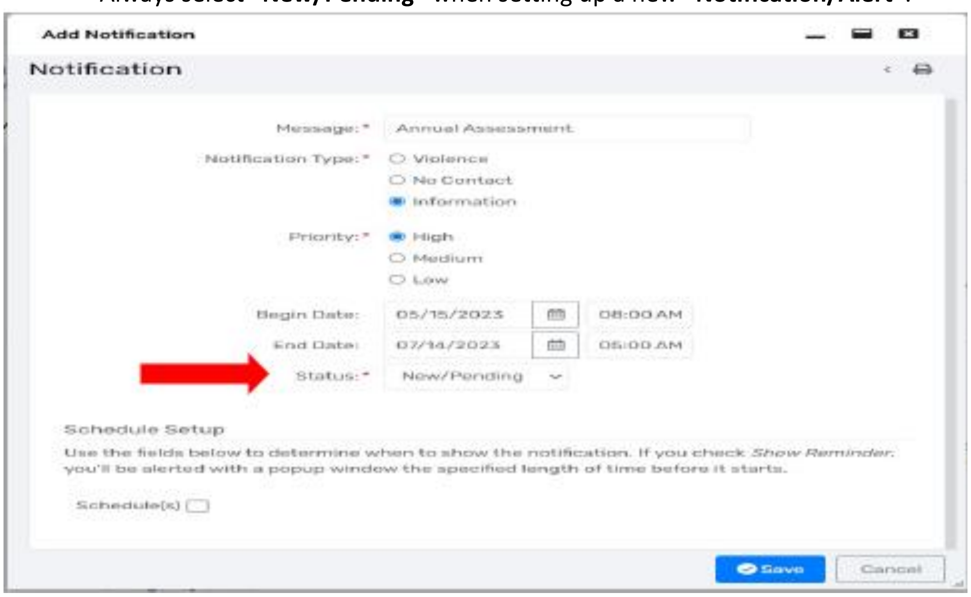
3. Click on **"+"** to **Add Notification**
4. An additional window will appear as seen in the following screenshot.



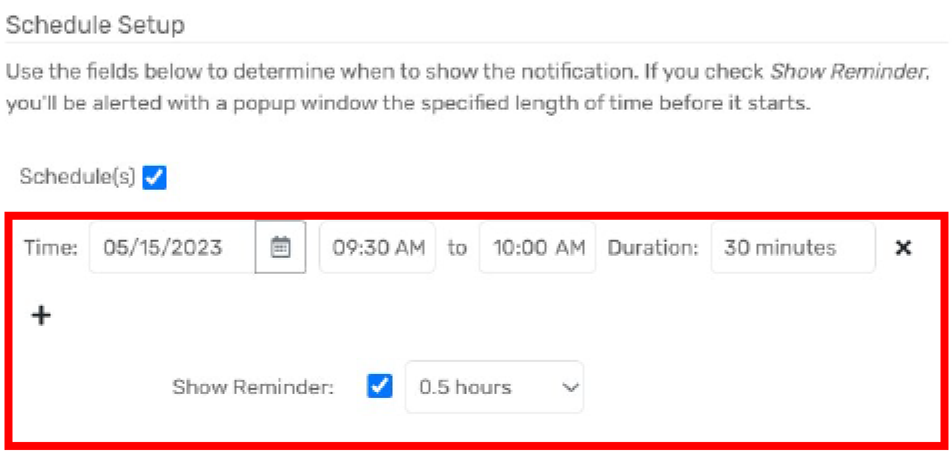
5. In the **“Message”** field, type the title of the **“Notification”** ***(Annual Assessment Client ID#1234567, etc.) Be sure to include the Client ID# for the Annual Assessment in the “Message” field.***
6. Select the **“Notification Type”** (*Violence, No Contact or Information*)
7. Select the **“Priority”** from the drop-down menu (*High, Medium, or Low*)
8. Type in the **“Begin Date”** and time (*AM or PM*) then type in the **“End Date”** and time (*AM or PM*) The **“Begin Date”** should be the date you would like for the system to begin sending you alerts on the Notification. For example, a **“Notification/Alert”** for an **“Annual Assessment”** should have a **“Begin Date”** of 30 days prior to the client’s 12-month anniversary of the client’s **“Project Start Date”**. The **“End Date”** for the **“Notification/Alert”** should be 30 days following the 12-month anniversary of the client’s **“Project Start Date”**. Please remember to allow for months with 30, 31 or 28/29 days when calculating this 60-day HUD required time frame for completing the **“Annual Assessment”**.

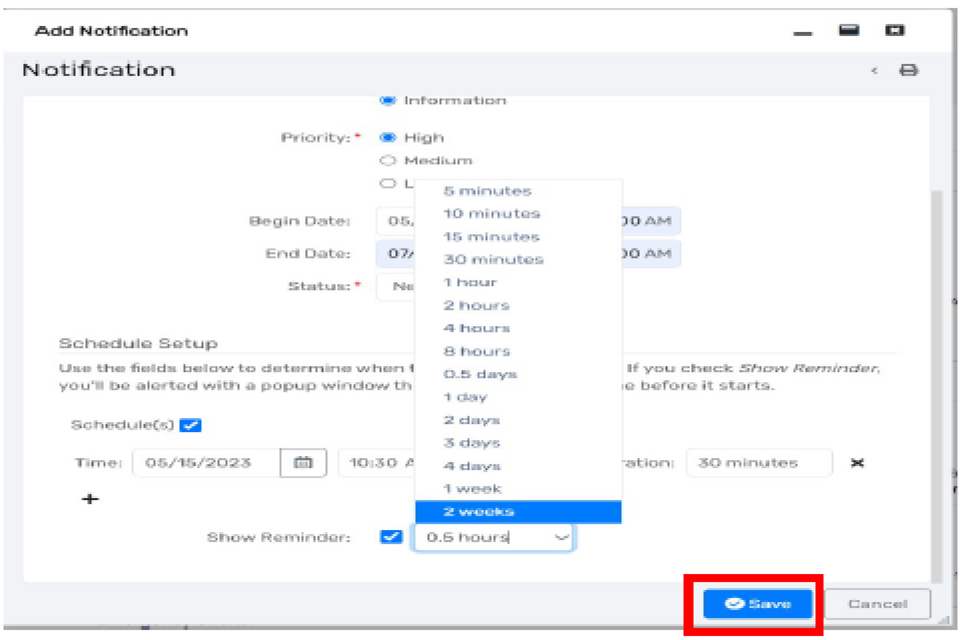
*The HMIS Data Quality Plan encourages sub-recipients to complete the required **“Annual Assessment” using a 30-day window**. This will ensure the assessment is completed within the HUD required 60-day window. This change was implemented due to the 60-day calculation errors when the window has both 30- and 31-day months. (Along with February which may have 28 or 29 days depending on Leap Year) By implementing a 30-day window for completing the required **“Annual Assessment”**, sub-recipients will know they have met the HUD required timeframe for the Annual Assessment. If you have questions regarding the HMIS Data Quality Plan, please email your respective helpdesk for assistance.*

9. • Select the **“Status”** from the drop-down menu (*New/Pending, Acknowledged, Complete, or Canceled*) Always select **“New/Pending”** when setting up a new **“Notification/Alert”**.



10. Next, scroll down to the **“Schedule Setup”** section of the pop-up box and click the **“Schedule(s)”** checkbox.
11. The **“Alert”** will begin popping up on the client’s record on the **“Begin Date”** you previously entered. You can change the time in the **“Alert”** fields along with the **“Duration”** of the **“Alert”** field.
12. Click the **“Show Reminder”** drop-down to select how often you would like the **“Alert”** to pop-up on your screen.
13. Click **“SAVE”** in the bottom right corner of the window.



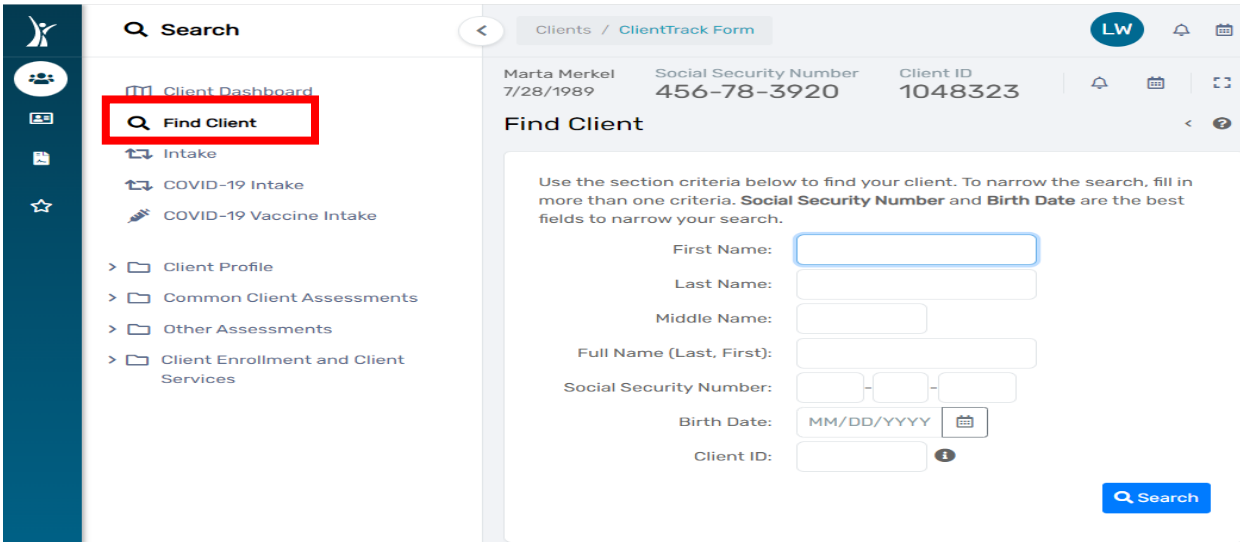


You have successfully added a **"Notification/Alert"** under your user profile in HMIS or DV ClientTrack file. The system will begin displaying a reminder alert (window) on the **"Begin Date"** entered for the Notification.

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 in the screenshot below.



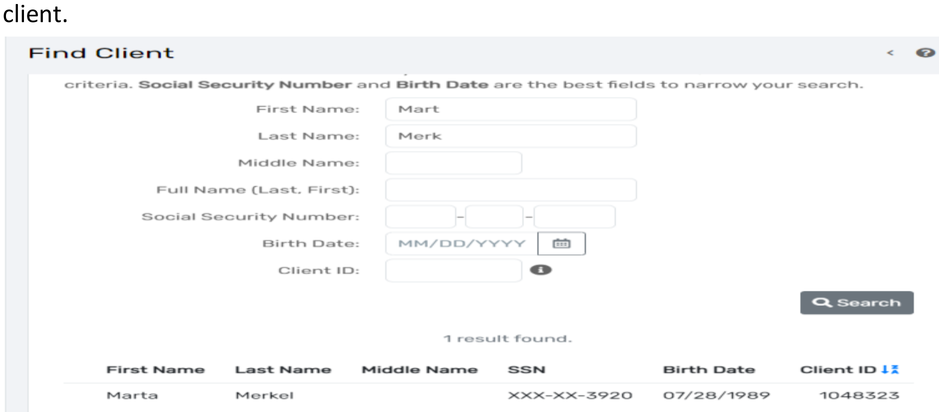
It is imperative you do not enter a duplicate client record into the system to ensure the accuracy and overall quality of the data. To speed the search process and reduce the chance for input error, input as few characters as possible in the criteria fields.

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.

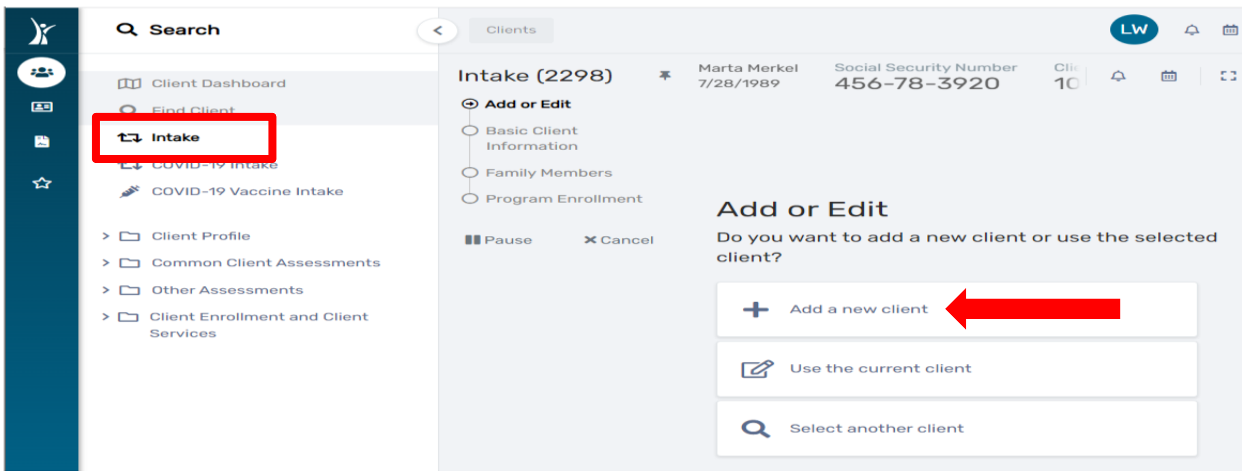


After selecting the client in the search list and going to the client's dashboard, if the client's basic information has changed, click on the "**Edit Client**" link in the list of case management tools found on the left-hand side of the screen outlined in red below to make any necessary changes to the 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.***

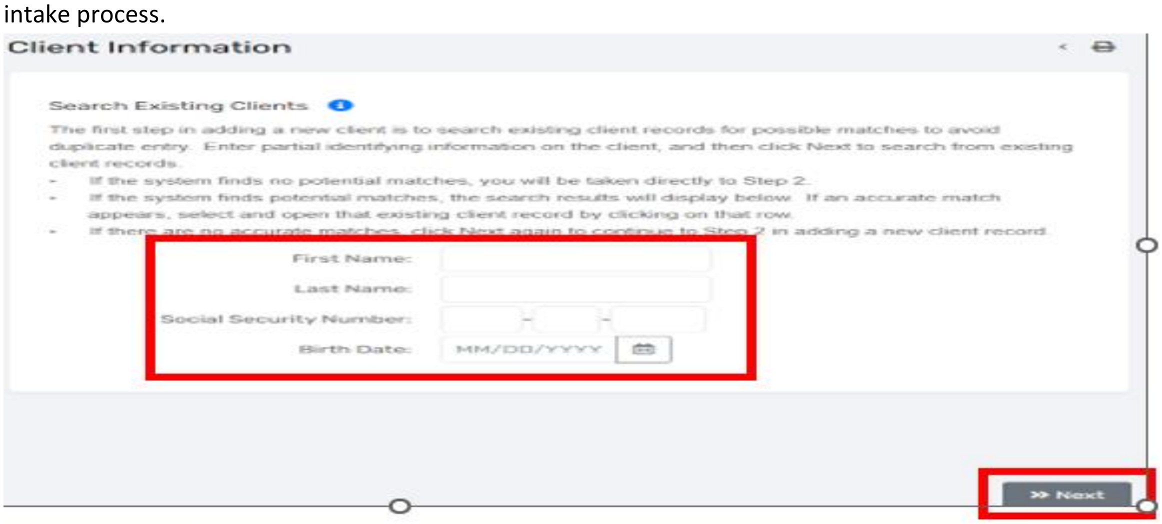
ADDING A NEW CLIENT WITH A PROGRAM ENROLLMENT

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.

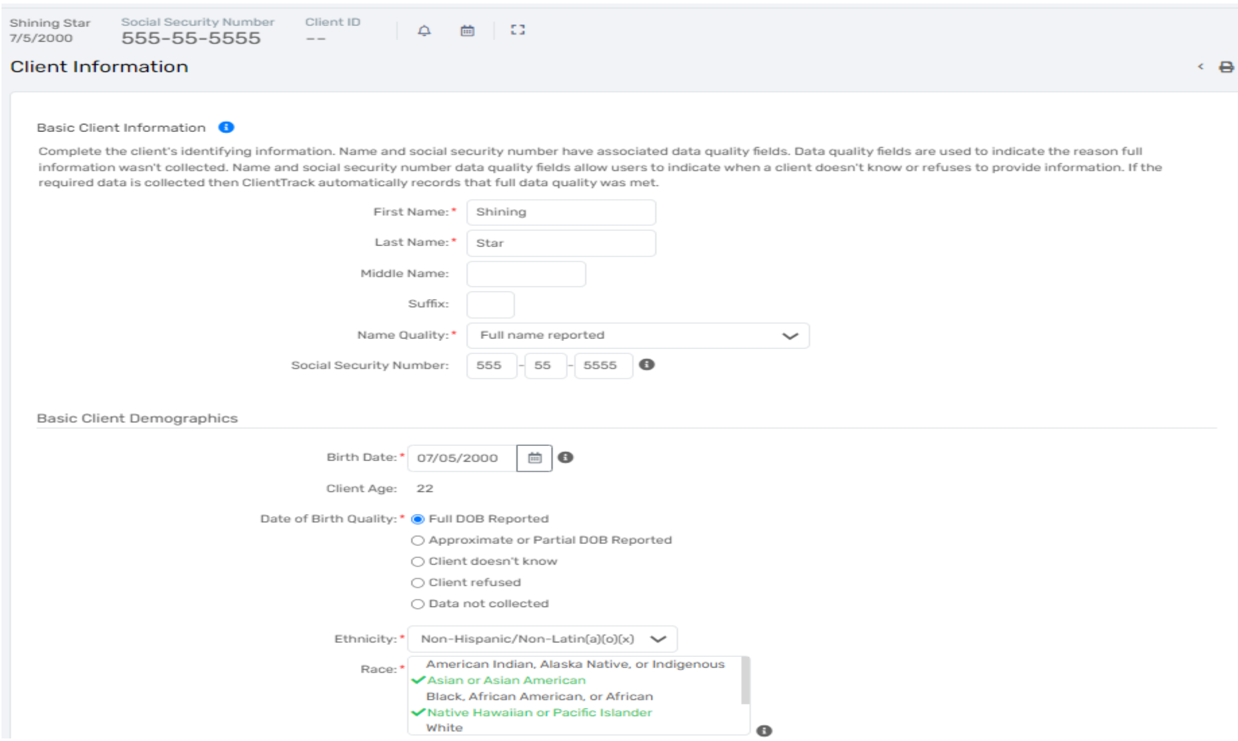
After conducting a search for the client in the system to ensure an existing client record did not already exist, you can add a new client record by selecting **"Intake"** in the upper left-hand corner of the screen found under **"Find Client."** Then choose **"Add New Client"** when prompted as seen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

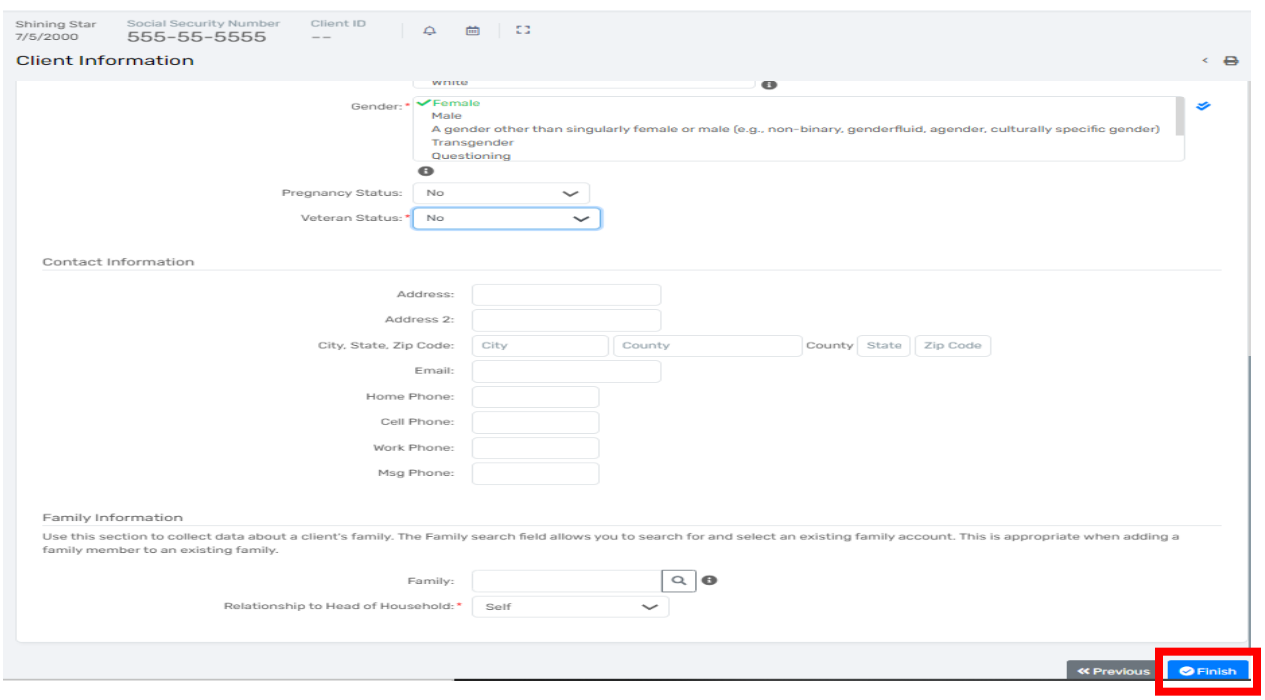


Enter your client's first and last name and click **"Next."** If a duplicate client already exists and was not identified during the client search the first time, a warning in red letters will be displayed. It is very important to review the displayed list. If the client is already in the system, click 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.





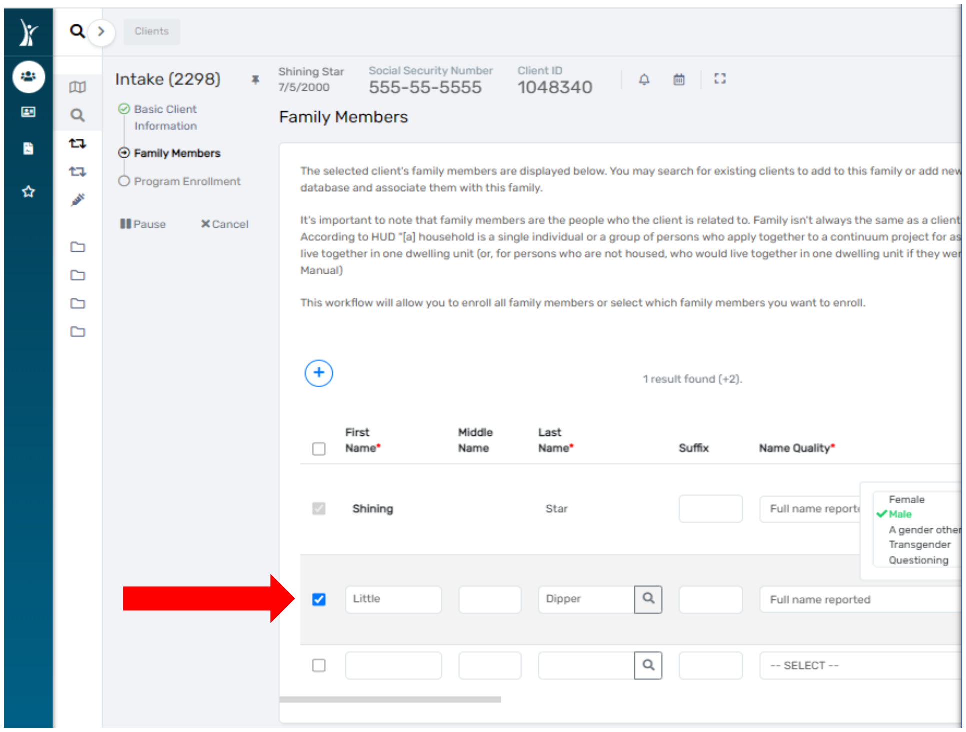
Please note that all the data elements are self-declared by the client and not attributed by the case manager or data entry personnel. The option "Data Not Collected" indicates that the question was not asked of the client and will report as missing on reports. Please do not make up information or answer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

Definitions of Basic Client Information Requirements

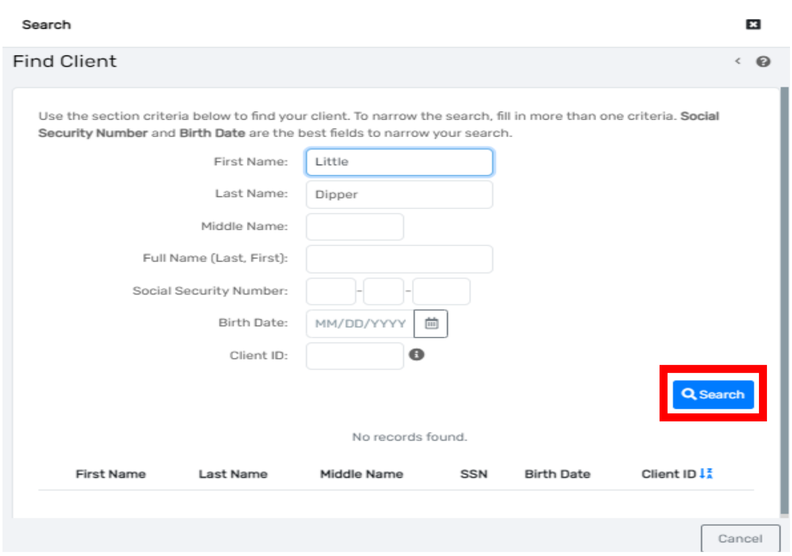
- **First Name -** Legal first name (do not add nicknames in "quotes" because those are not searchable elements).
- **Last Name** – Legal last name.
- **Name Quality** – Describes the quality of the name reported by the client. Options are: Full name reported, Partial, street name, or code name reported, 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 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.

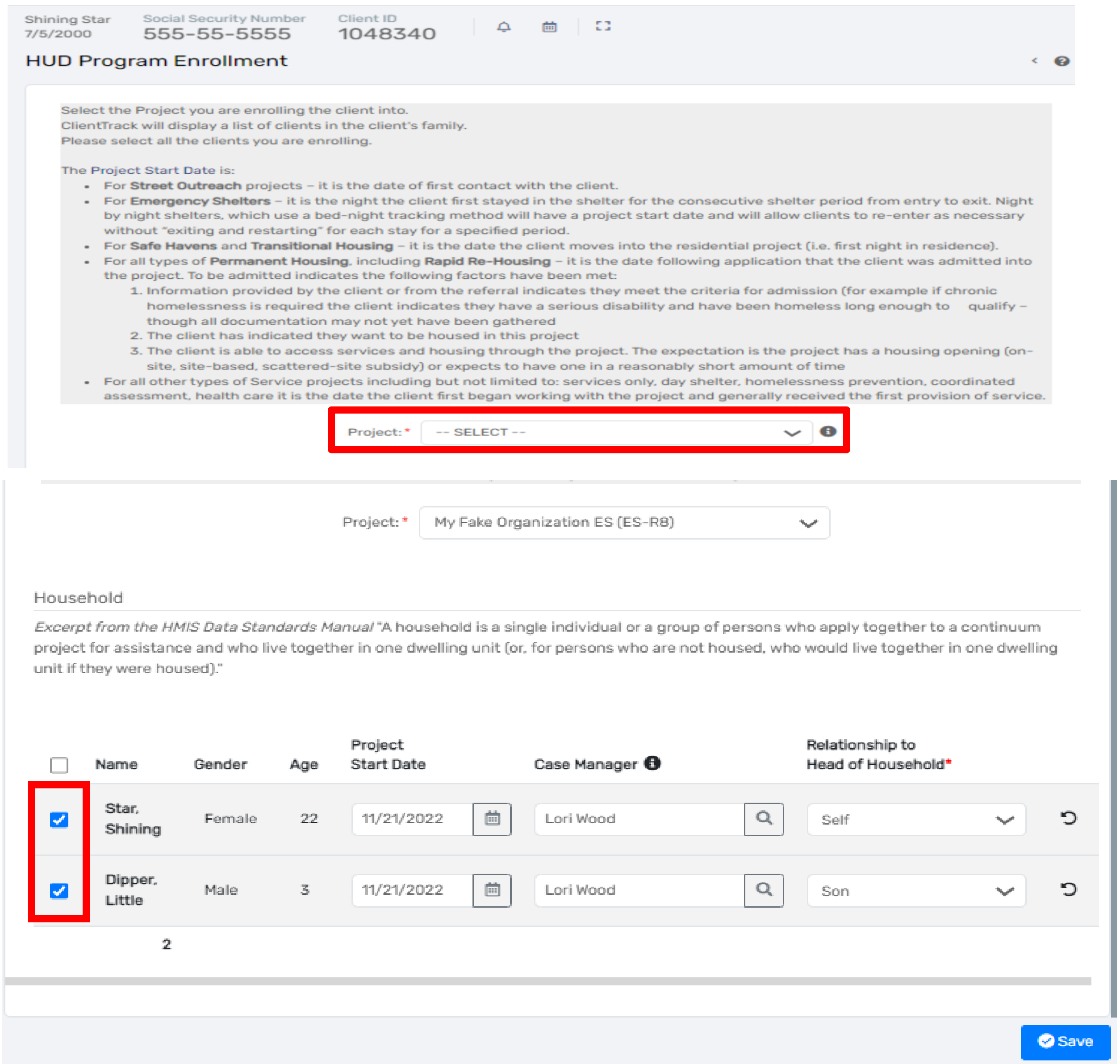


Click **"Save & Close"** when finished adding household members.

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.

Now, 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.

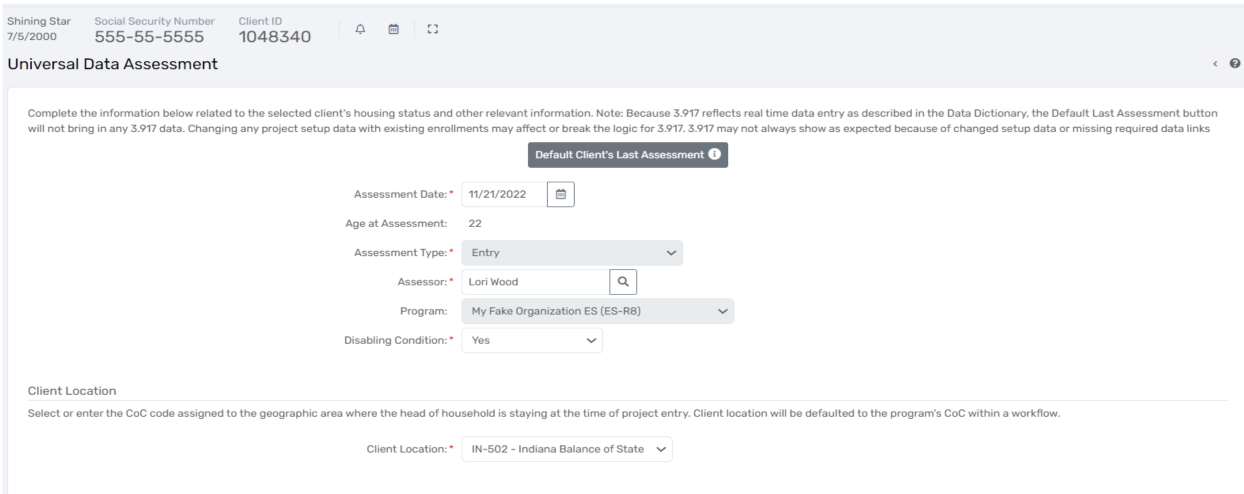


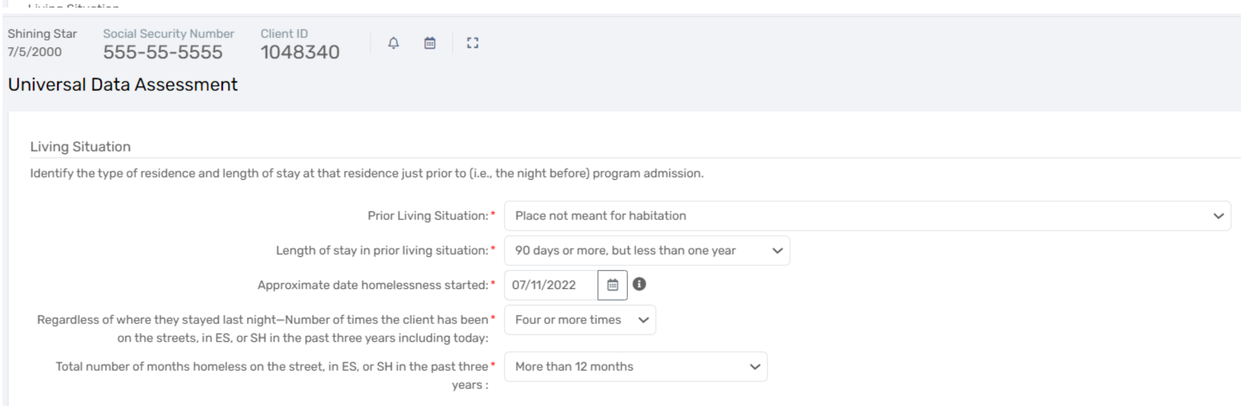
Remember to change the Enrollment Date if you are back dating the information. To ensure accurate data quality, enter all client data in a timely manner. "Date of Move In" is only prompted for clients enrolling in Permanent Housing programs (RRH, PH, PSH). If you don't find your program option when enrolling a client,

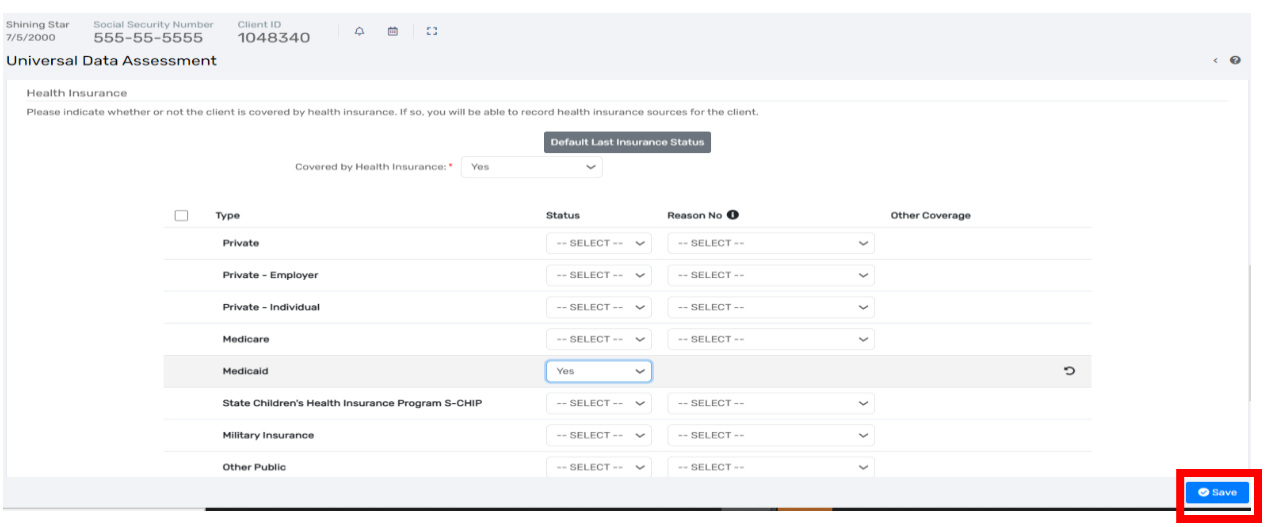
cancel the workflow by clicking the black "X" in the workflow screen found in the upper left-hand corner and please notify IHCDA immediately by emailing HMISHelpDesk@ihcda.IN.gov . Program information must be set up in the system before you can begin to enroll clients.

HMIS UNIVERSAL DATA ASSESSMENT FOR INTAKE WORKFLOW

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





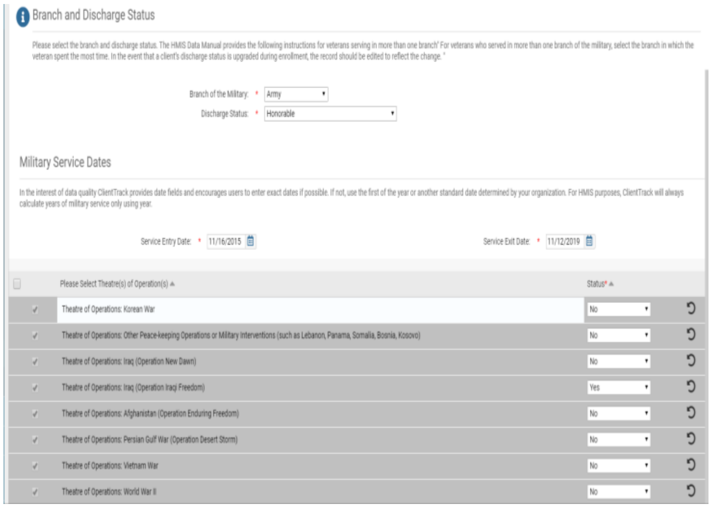


Definitions of Universal Data Assessment Requirements

- **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.

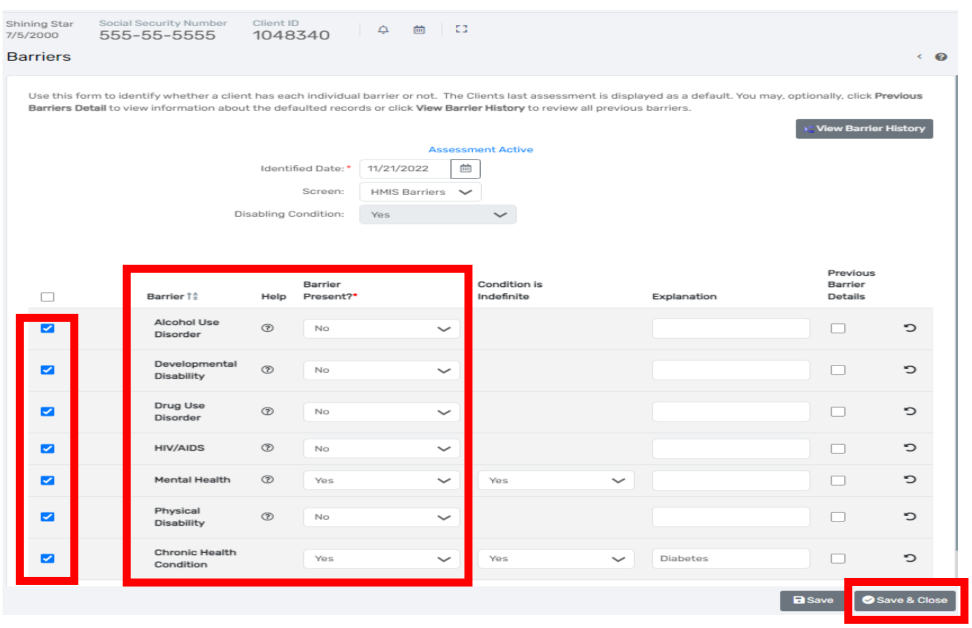
VETERAN ASSESSMENT FOR INTAKE WORKFLOW

The Veteran Assessment will only be included in the workflow if you select **"Yes"** for the **"Veteran Status"** on the basic client information screen. 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."**



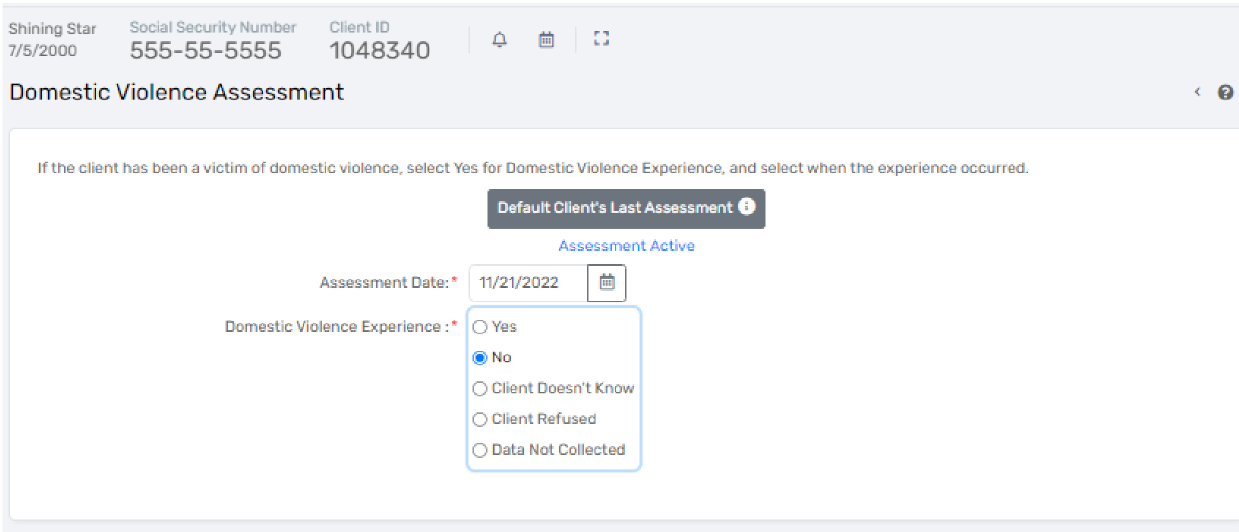
HMIS BARRIERS ASSESSMENT FOR INTAKE WORKFLOW

To select a barrier, click on the drop-down box for **"Barrier Present"** and change the status to **"Yes"** for each barrier the clients disclose having, then complete any required fields that appear after selecting that specific barrier. If the client has no barriers, you must select **"No"** in the **"Barrier Present"** column for each Barrier listed on the assessment. 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."**

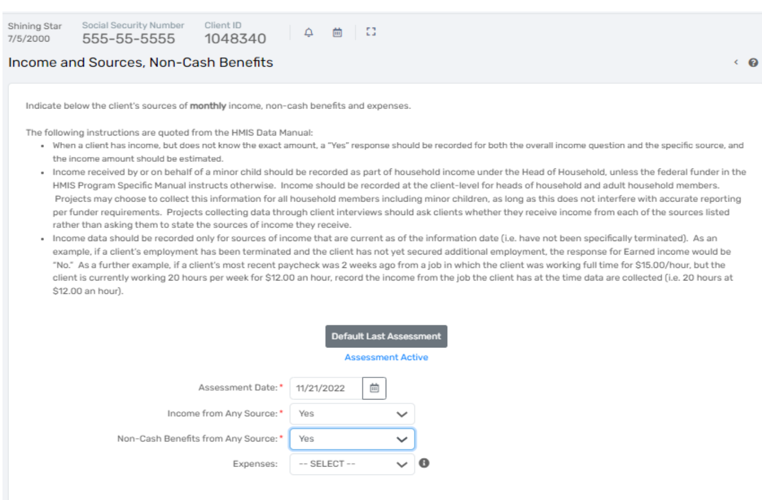
DOMESTIC VIOLENCE (DV) ASSESSMENT FOR INTAKE WORKFLOW

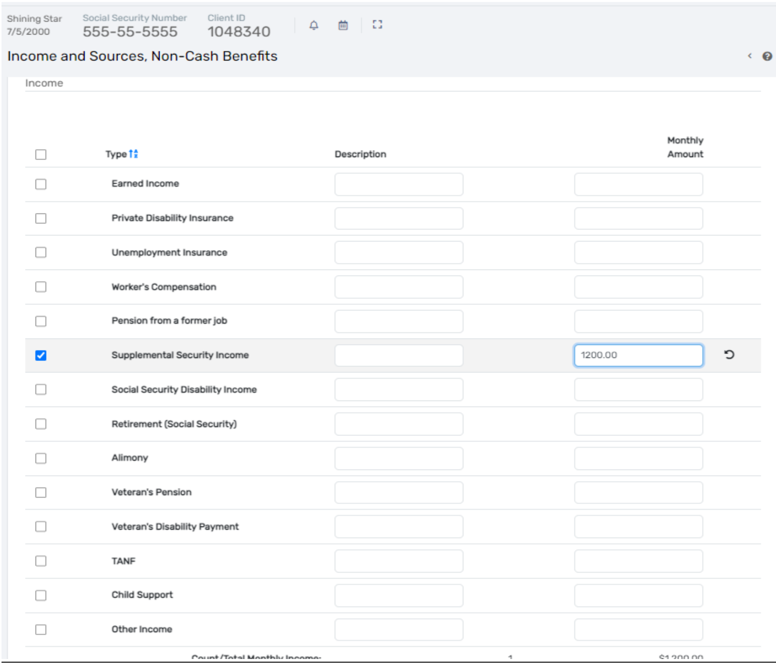


Complete the required information for the Domestic Violence Assessment. Please note that if domestic violence is reported and you select **"Yes"** for **"Domestic Violence Experience,"** you will be prompted for more information. If the client reports no domestic violence, then click **"Save"** to continue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

INCOME AND SOURCES, NON-CASH BENEFITS

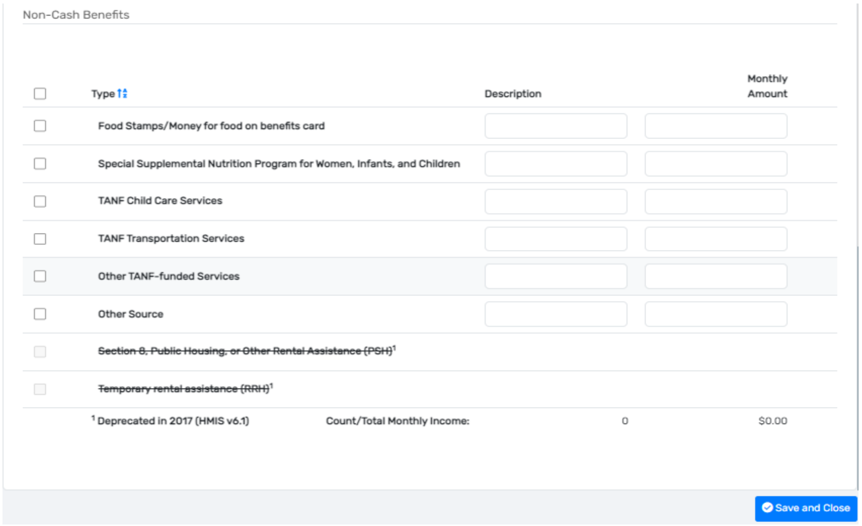
Complete the status for **"Income from Any Source"** and **"Non-Cash Benefits from Any Source"** with the provided drop down lists. If the status for either of these financial sources is **"Yes,"** you are required to select a corresponding **"Type"** (definitions below) of income/benefit and the **amount *(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.**





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

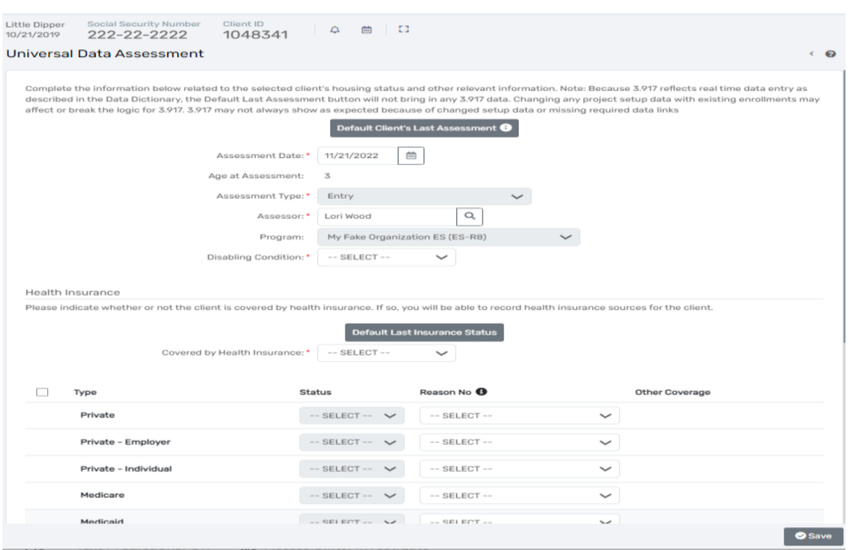


[Definitions of Non-Cash Benefits]()

- **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

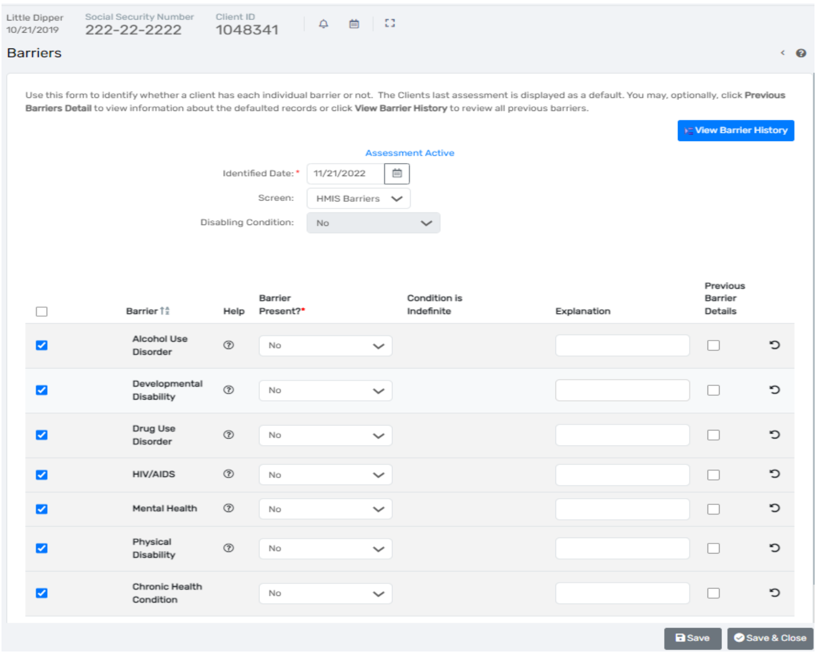
HMIS UNIVERSAL DATA ASSESSMENT FOR CHILD AT INTAKE

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.



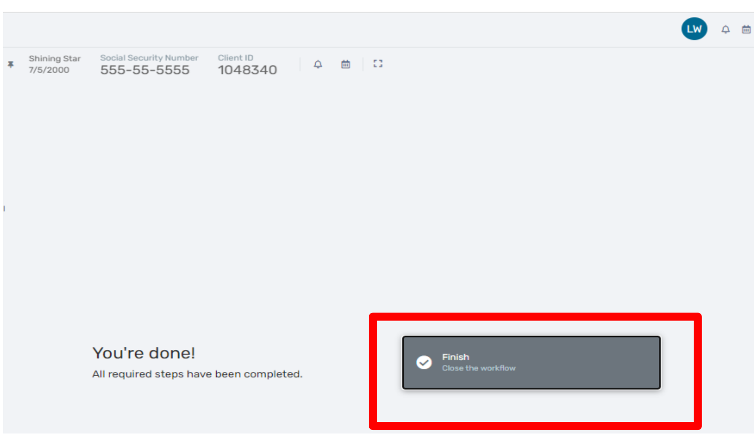
HMIS BARRIERS ASSESSMENT FOR CHILD AT INTAKE

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."**



COMPLETING THE INTAKE WORKFLOW

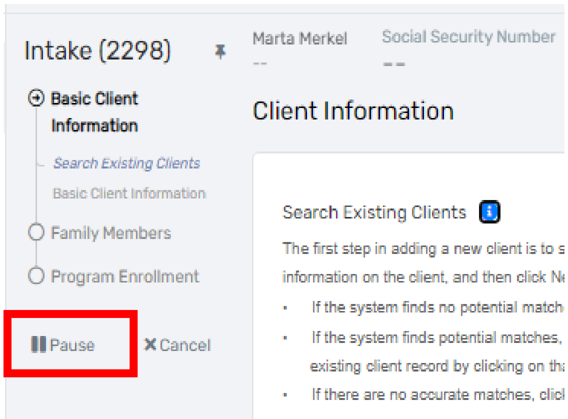
Once you have completed the required entry assessments for your client and household members, you will be prompted to **"Finish"** the workflow. If the workflow is complete, then click **"Finish."** You will then be directed back to the head of household's client dashboard, and you can see the new program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



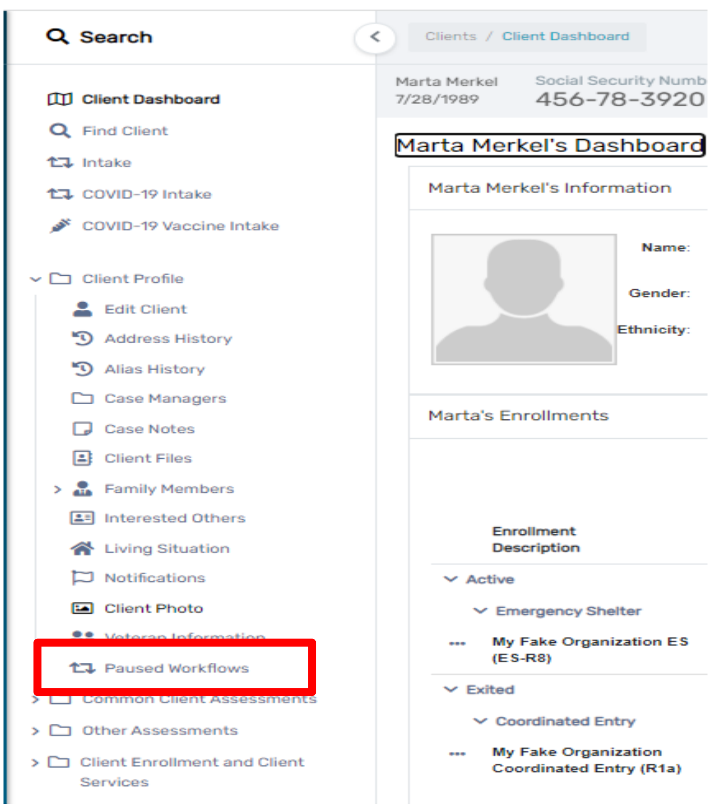
If you need to go back and change information entered in the workflow prior to finishing, you can click on the specific section of the workflow you wish to return to in the workflow window that appears on the left-hand side of the client record (outlined in red above). Clicking on the link beside the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

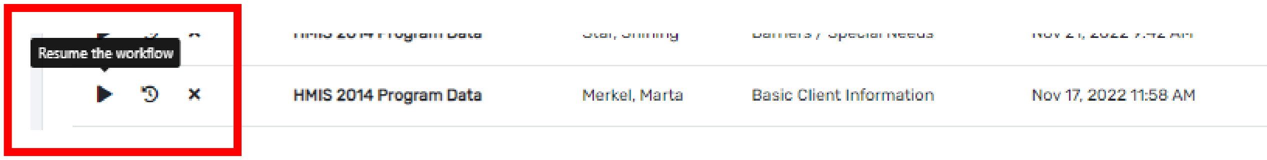
PAUSING A WORKFLOW

You may also **"Pause"** a workflow by clicking on the pause button located in the lower left-hand corner of the workflow window beside the black **"X"**. 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 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.





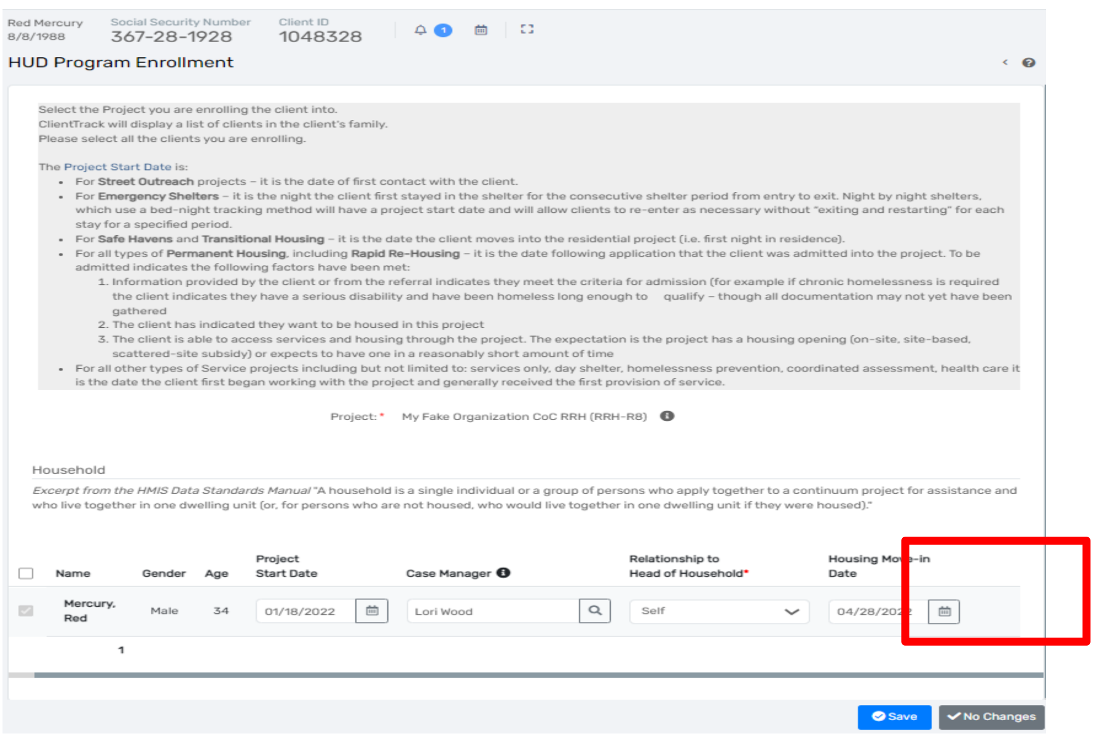
UNIQUE PROGRAM REQUIREMENTS AT ENTRY

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:

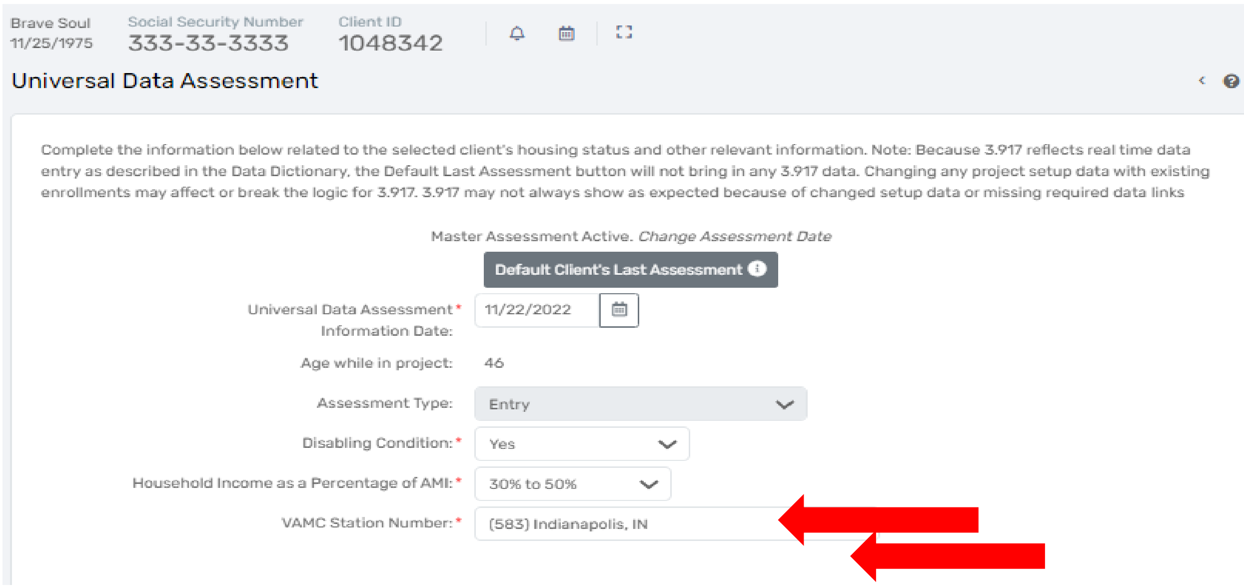
1. SSVF
2. PATH
3. HOPWA
4. RHY

SUPPORTIVE SERVICES FOR VETERAN FAMILIES (SSVF) ENROLLMENT AT INTAKE

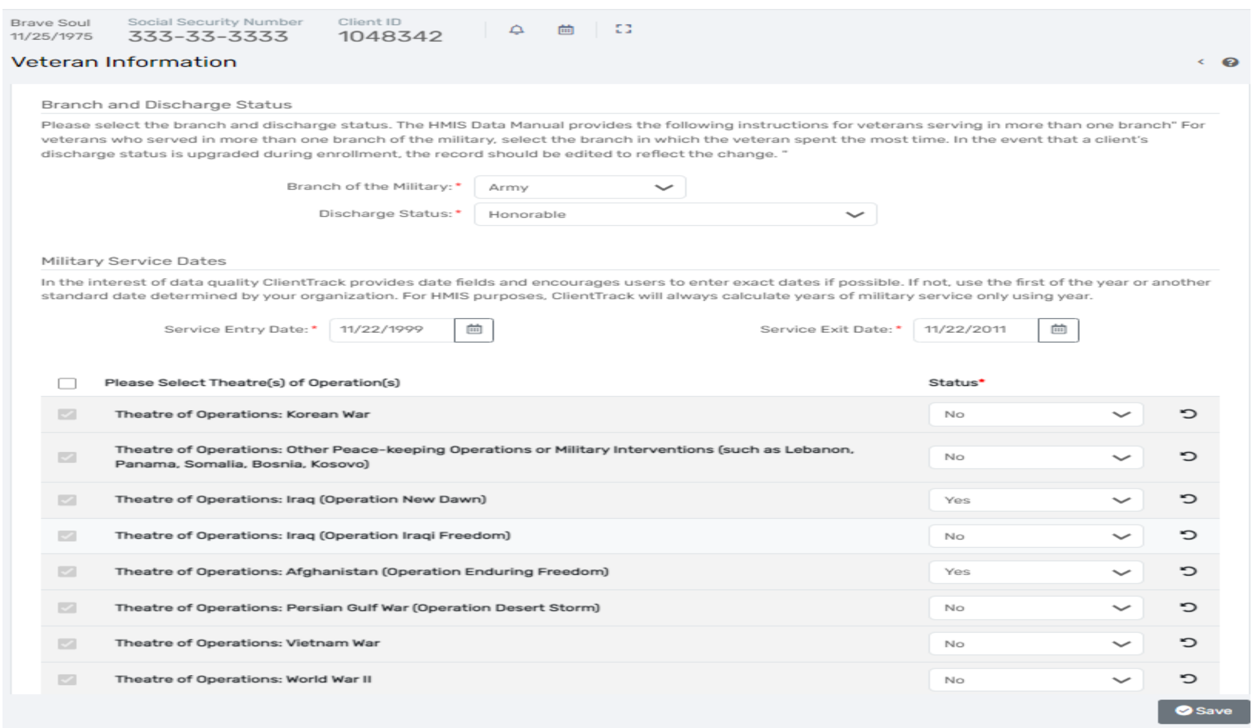
In addition to the previous assessments outlined earlier in this manual, the SSVF enrollment will require documentation of a client's **Housing Move in Date** for Rapid Re-Housing enrollments as seen below. You can use the calendar icon to complete date fields by clicking on the calendar icon and then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



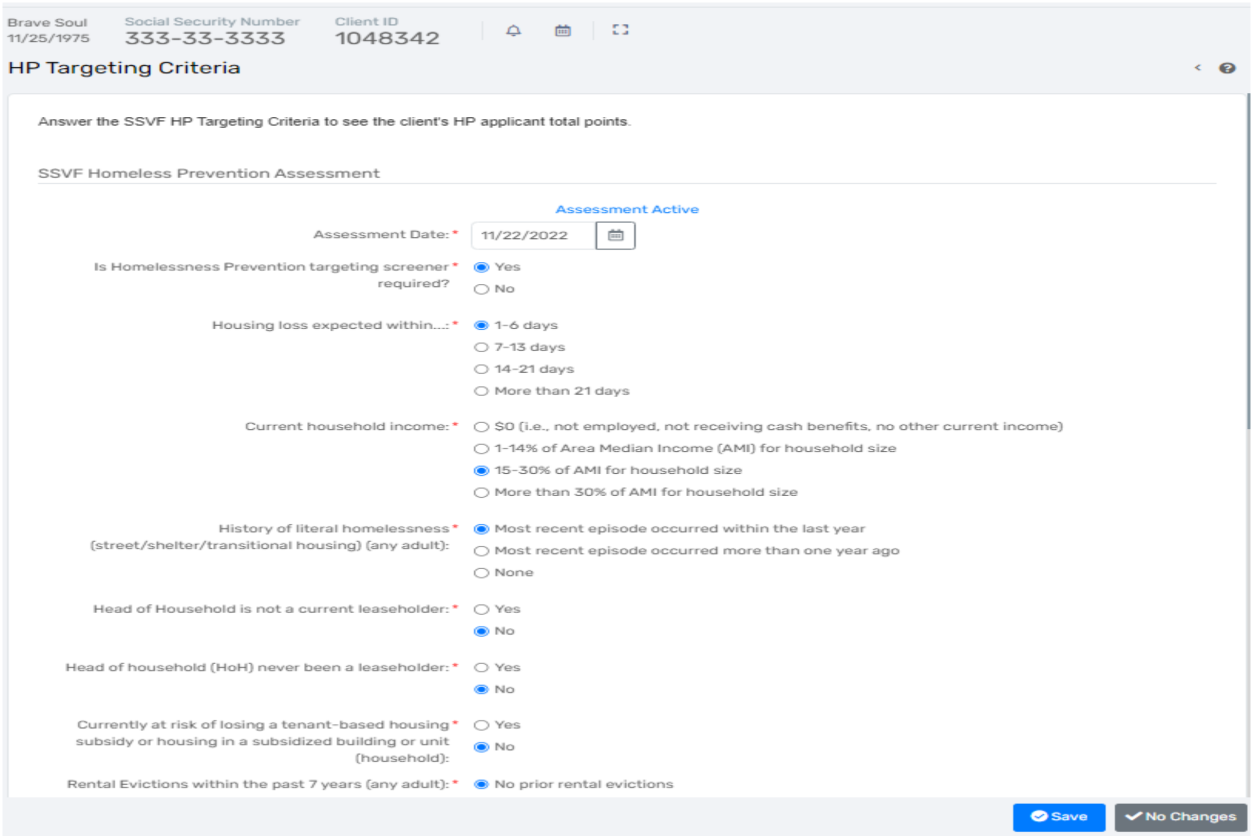
The SSVF project enrollment will also require completion of the **Annual Median Income (AMI) and, VAMC Station Number** before you can proceed in the workflow as seen on the next page.

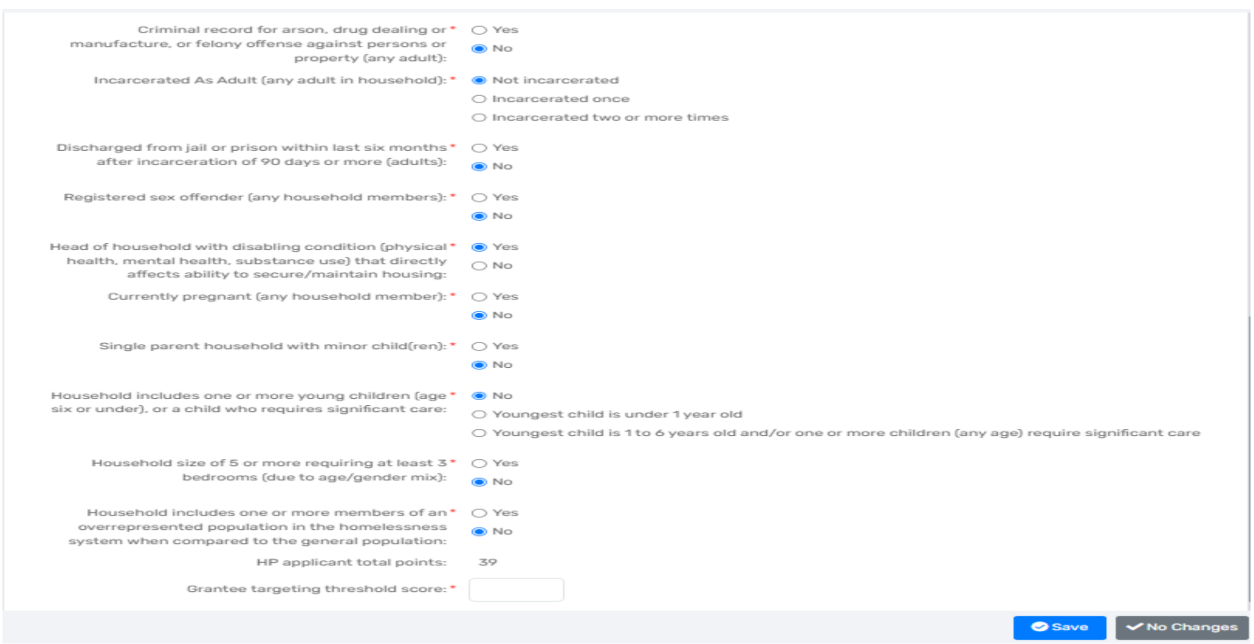


SSVF also requires completion of the Veteran Information: Branch and Discharge Status, Military Service Dates and Selection of the **"Theatre(s) of Operations"**



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

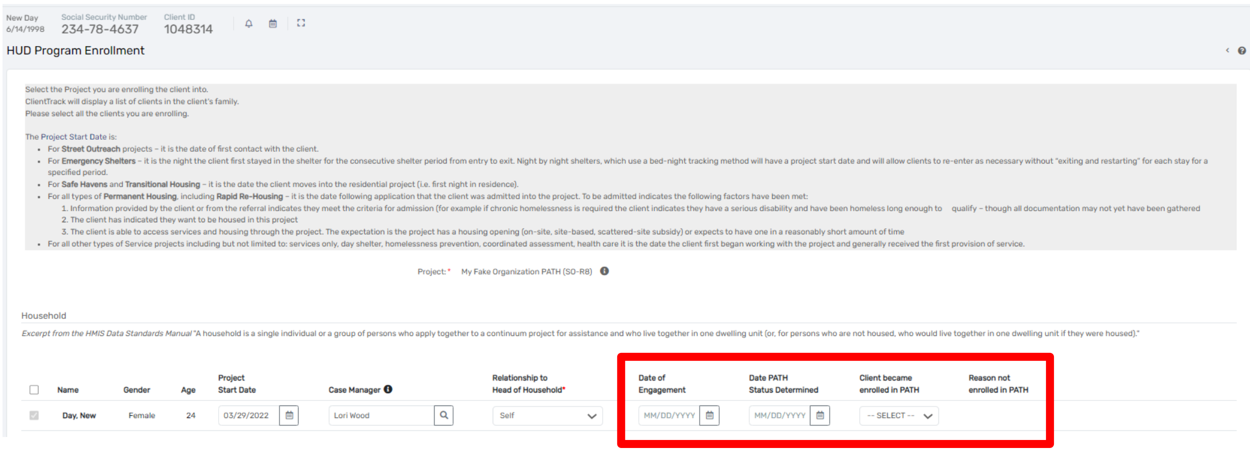




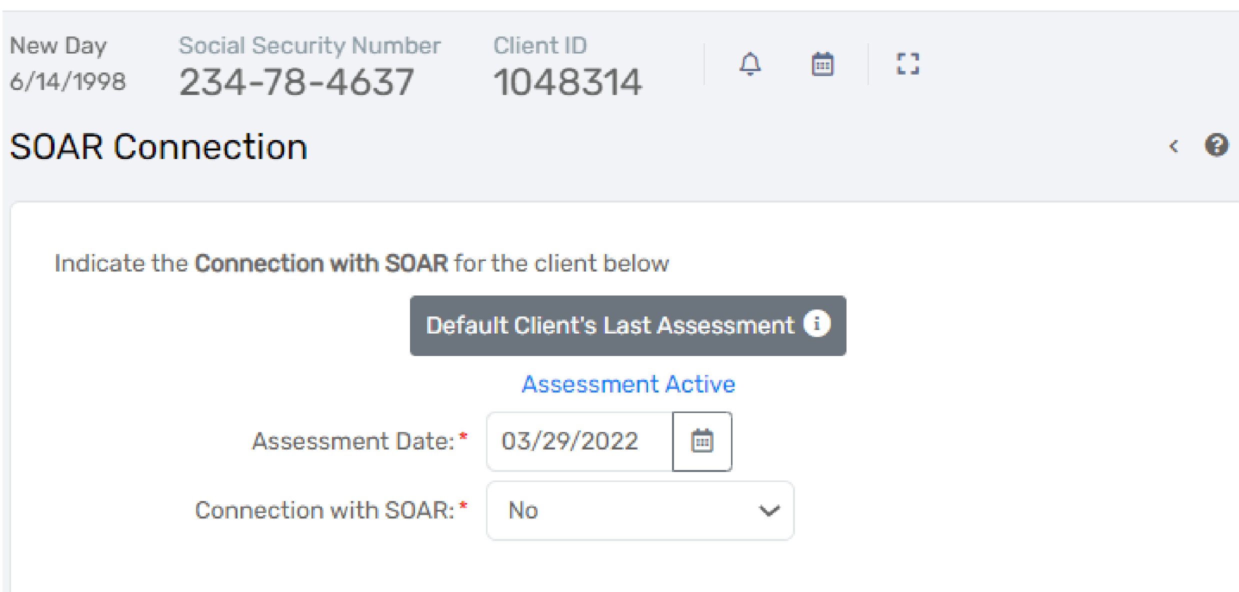
PROJECTSS FOR ASSISTANCE IN TRANSITION FROM HOMELESSNESS (PATH) ENROLLMENT AT INTAKE

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:

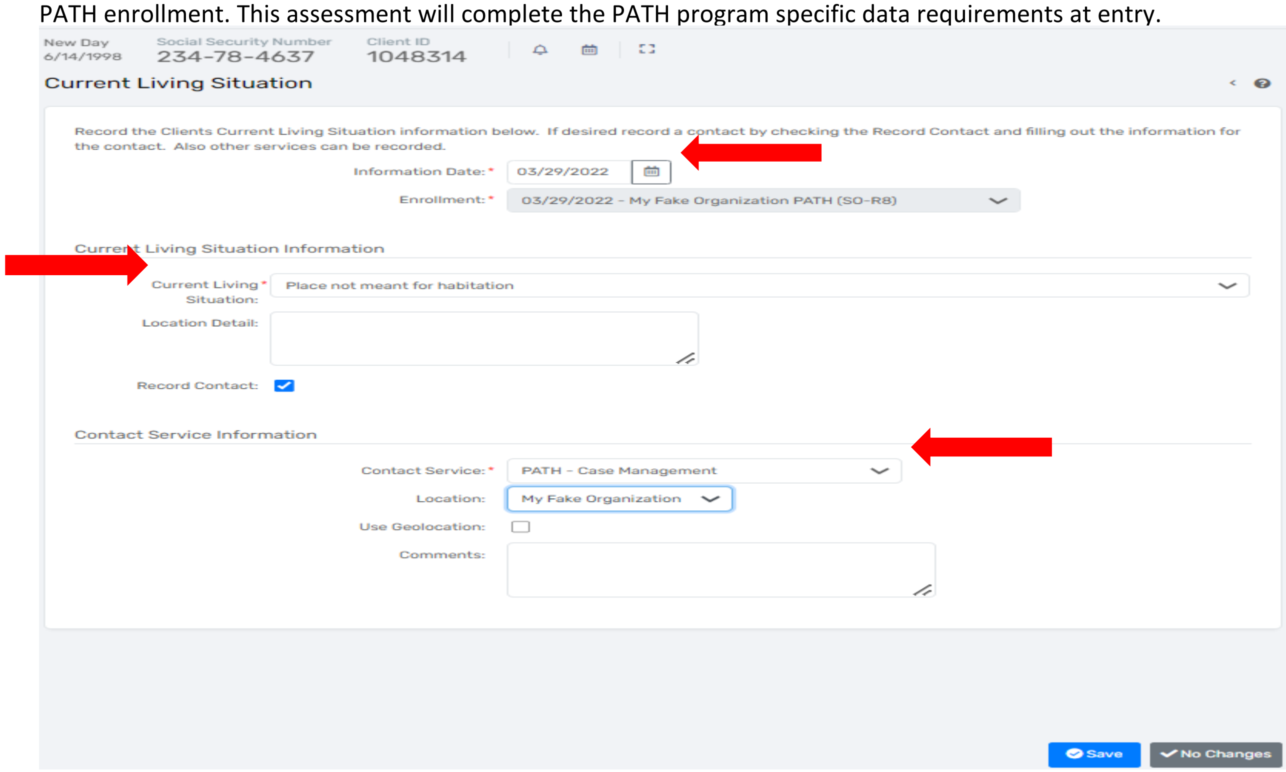
- **Date of Engagement -** Date of Engagement is defined as the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan.
- **Date PATH Status Determined** – Date client's enrollment in PATH is determined.
- **Client Became Enrolled in PATH** - 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.



Before completing the Intake workflow, you will also be required to document the **SOAR Contact** information as seen below.

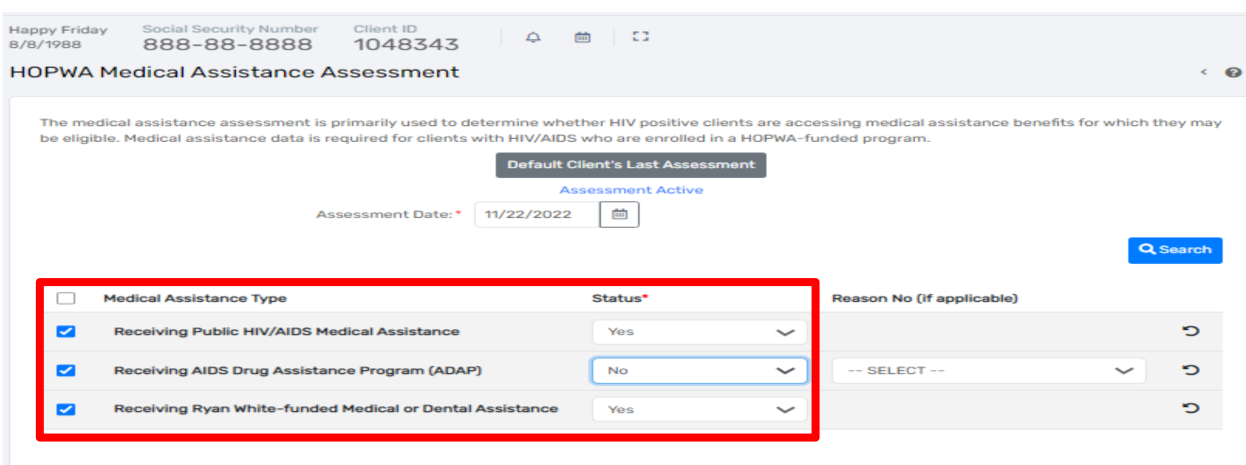


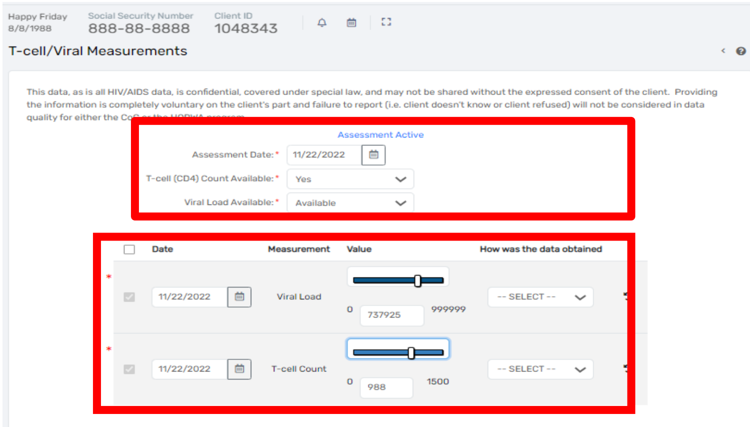
Current Living Situation will also be required as seen below. Complete all the required data fields to complete the PATH enrollment. This assessment will complete the PATH program specific data requirements at entry.



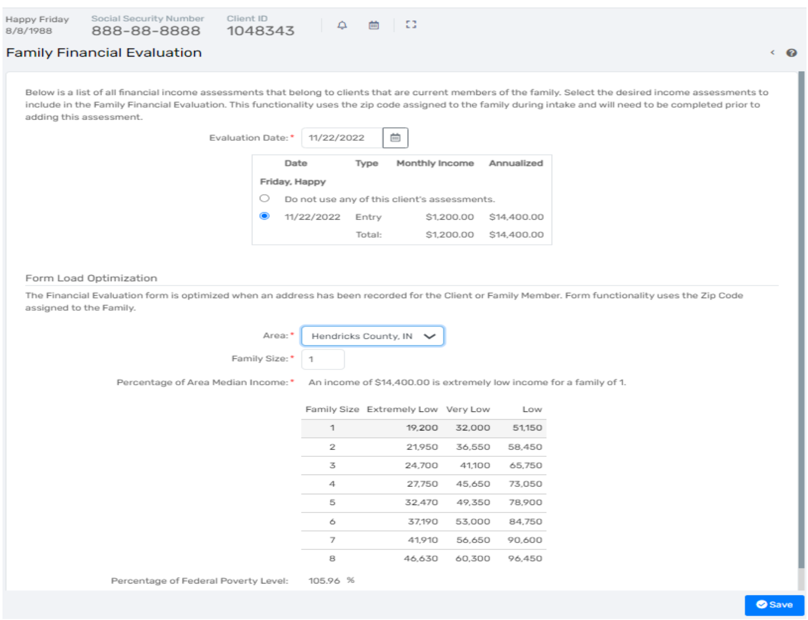
HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS (HOPWA) ENROLLMENT AT INTAKE

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.





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. Complete the **Family Financial Evaluation**

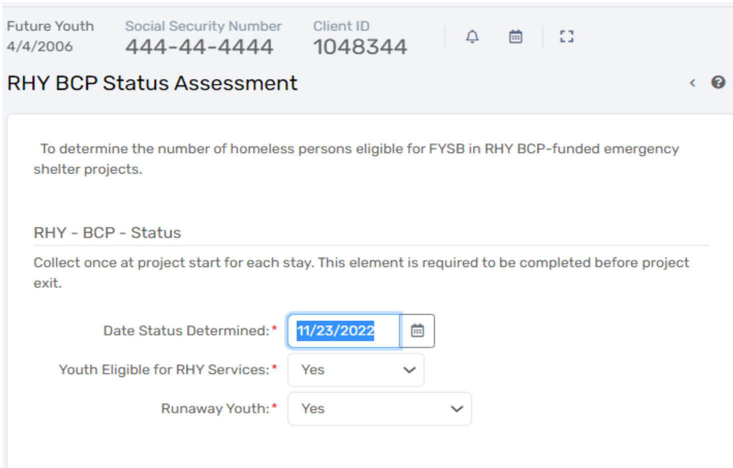


RUNAWAY & HOMELESS YOUTH (RHY) ENROLLMENT AT INTAKE

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.

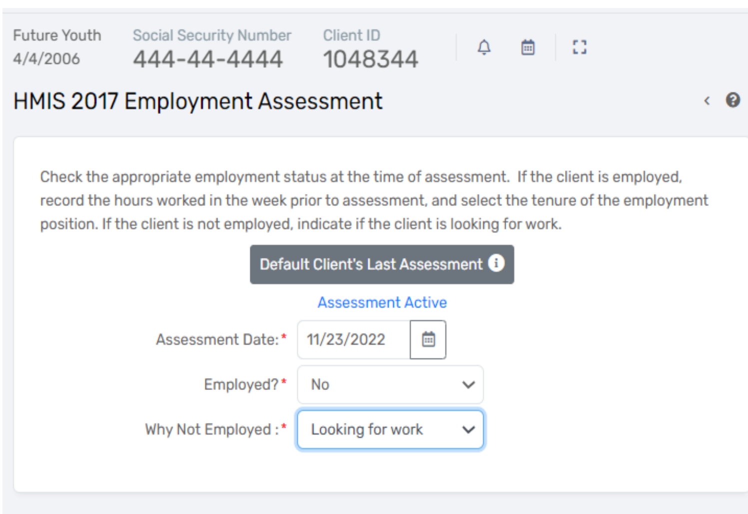
You will also complete the following assessments:

- 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

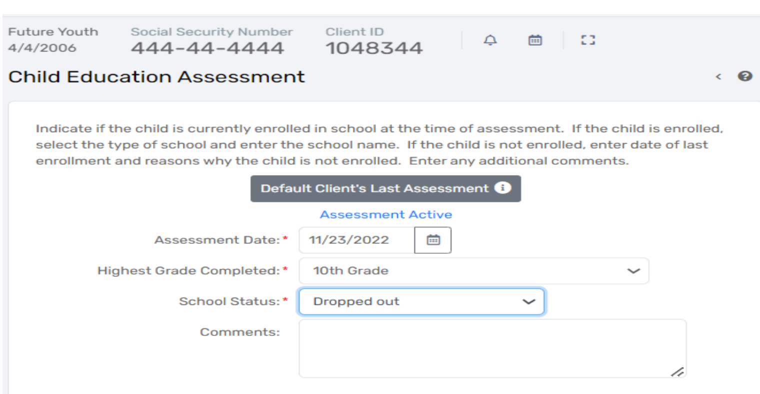


Basic Care Program (BCP) Enrollment Status Assessment – Complete the required data and click **"Save"** to continue.

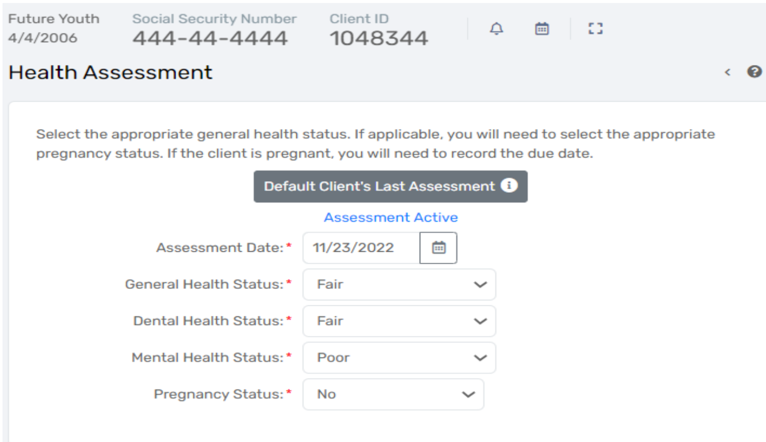
Employment Assessment – The built-in logic will require additional information depending on the client's employment status. Click **"Save"** to continue.



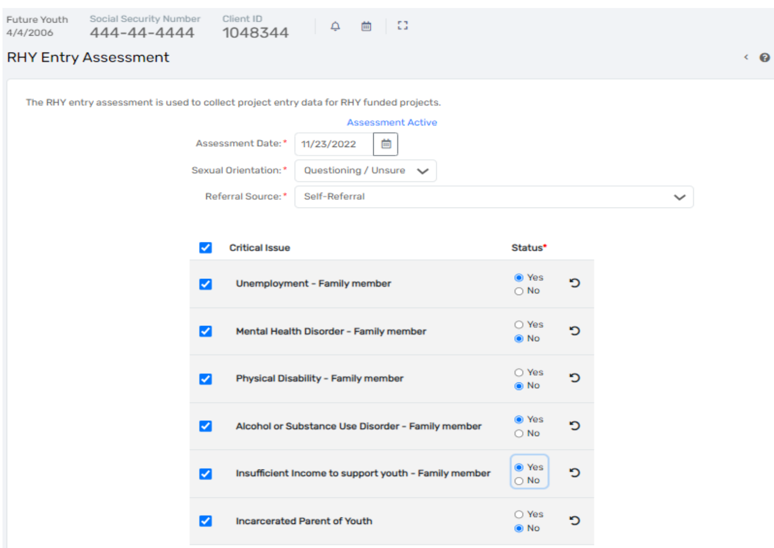
Child Education Assessment – Complete the required data and click **"Save"** to continue.



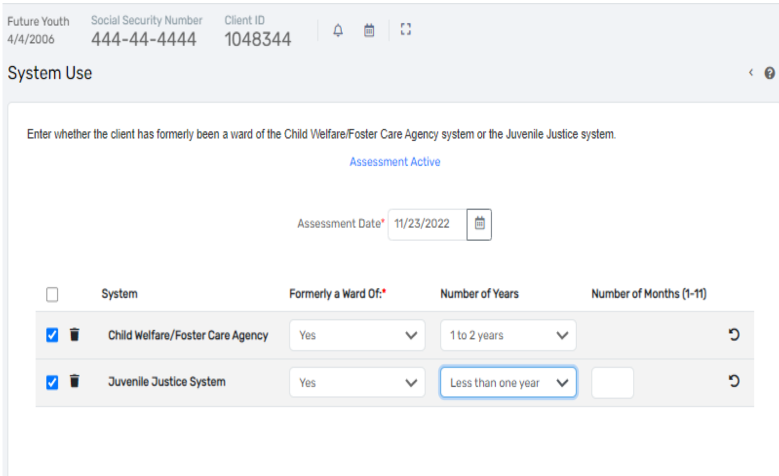
Health Assessment - Complete the required data and click **"Save"** to continue.



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.

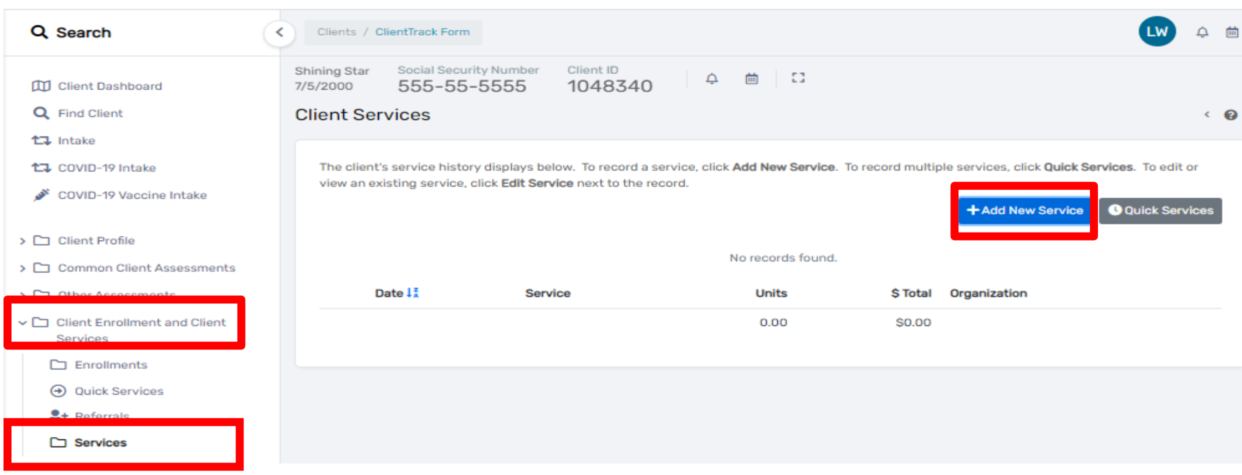


System Use Assessment – Complete all the required data to move forward in the workflow. Be sure to check both **"Systems"** and change the default status of **"Child Welfare/Foster Care Agency"** and/or **"Juvenile Justice System"** to **"Yes"** if the client reports being a ward of that system. Again,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



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 click on "**Add New Service**" to document a new service.

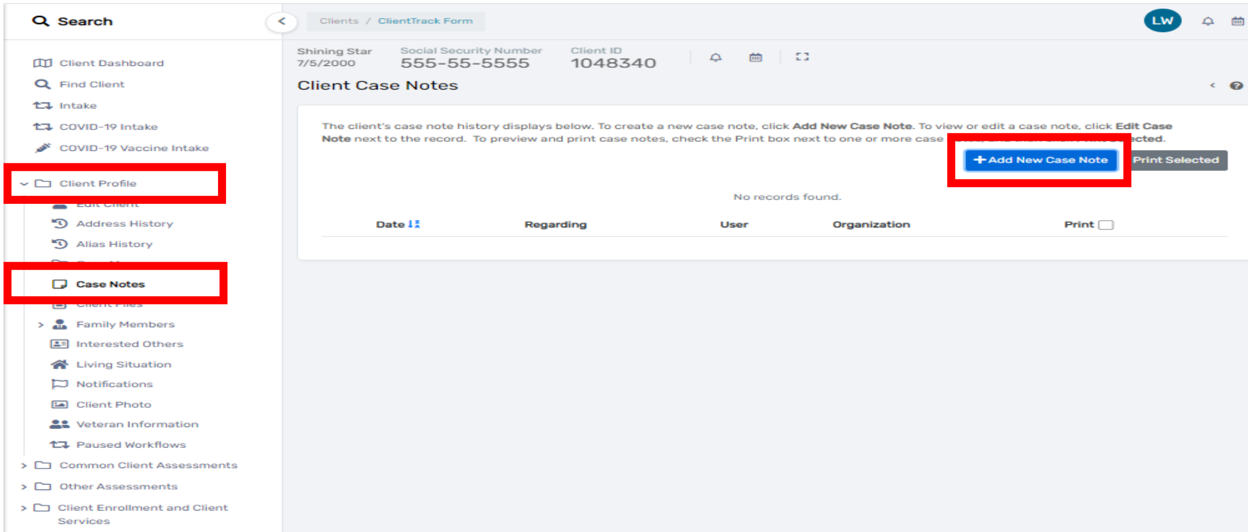


You will see the Services home screen where you select the enrollment associated with the service and the service provided. You can also enter units (1.00 unit = one hour of case management or a bus pass) to track costs. The comments section can be used for reminders; however, this is not a space for 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.

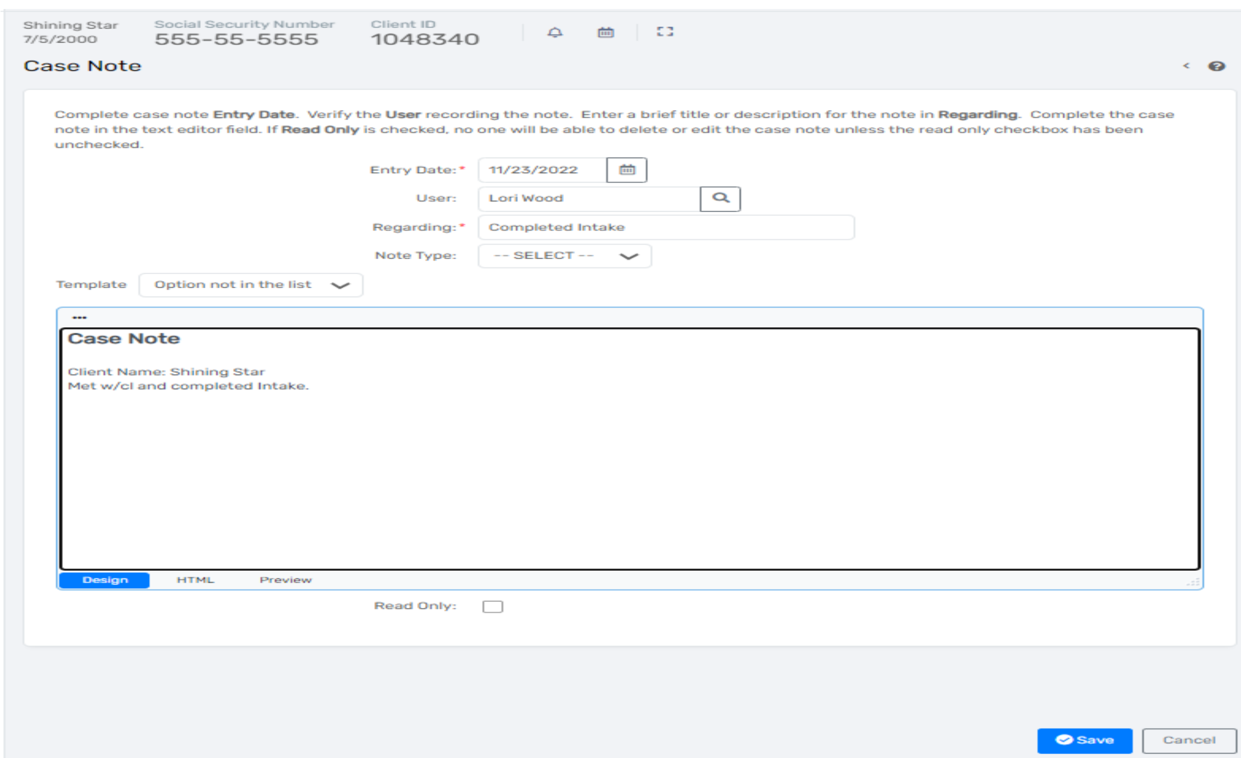
When you are finished documenting a service, click on the "**Save**" button, and you will be taken back to the Services home screen where you can edit or delete a service you created.

CASE NOTES

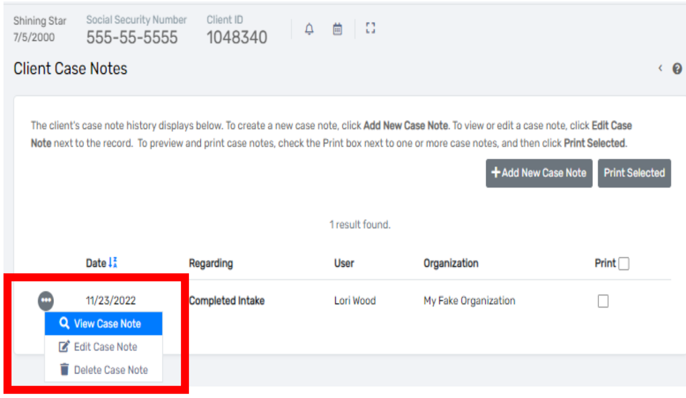
Timely and robust case notes assist you and other case managers at your organization in serving your clients. It is extremely important that meetings, calls, services, and other relevant information regarding your client are properly documented in case notes.



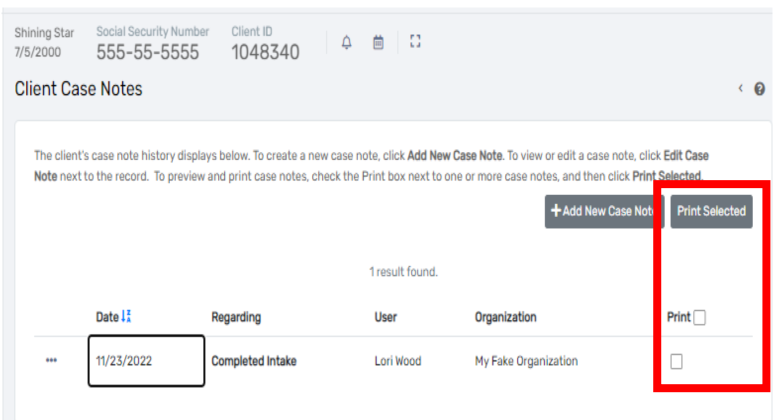
To add case notes, click on the "**Client Profile**" link on the left-hand side of the screen. Next, click on **"Case Notes".** Click on the "**Add New**" button on the upper right-hand side of the screen. ***Any case notes created for a client are restricted to case managers within your organization.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



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 three dots  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.

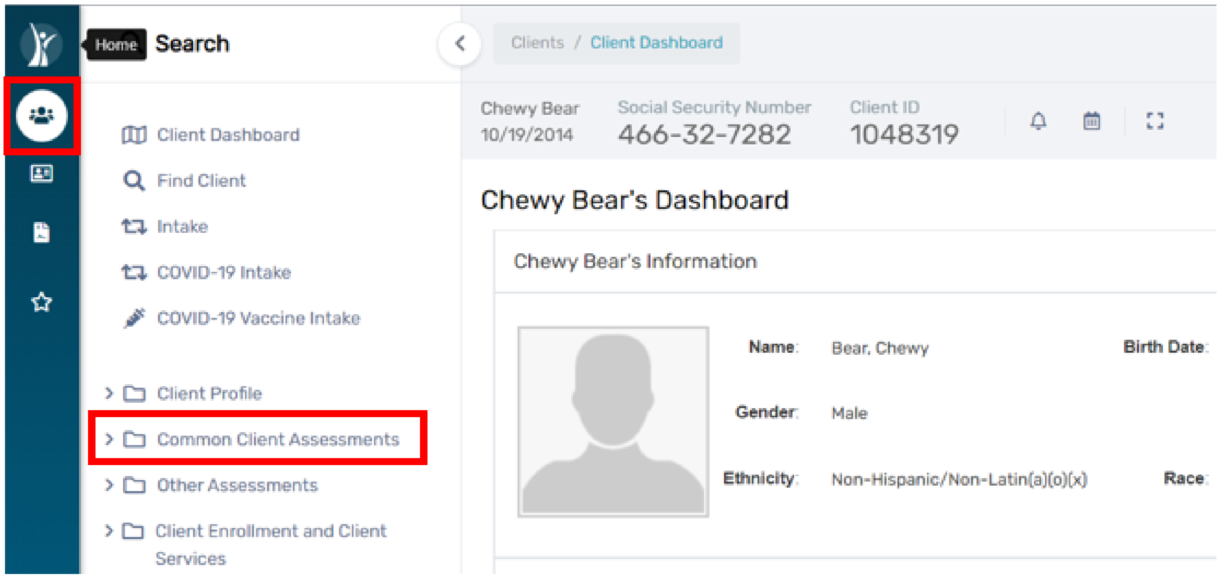
UPDATE/ANNUAL ASSESSMENT

The most common data quality error, and data element with the highest error rate across the different project types, is Income and Sources at Annual Assessment. This How to guide will help you know how to identify this issue and correct it. You can also visit the HMIS Manual to review how to properly enter annual assessments thus avoiding this data quality data in the future."

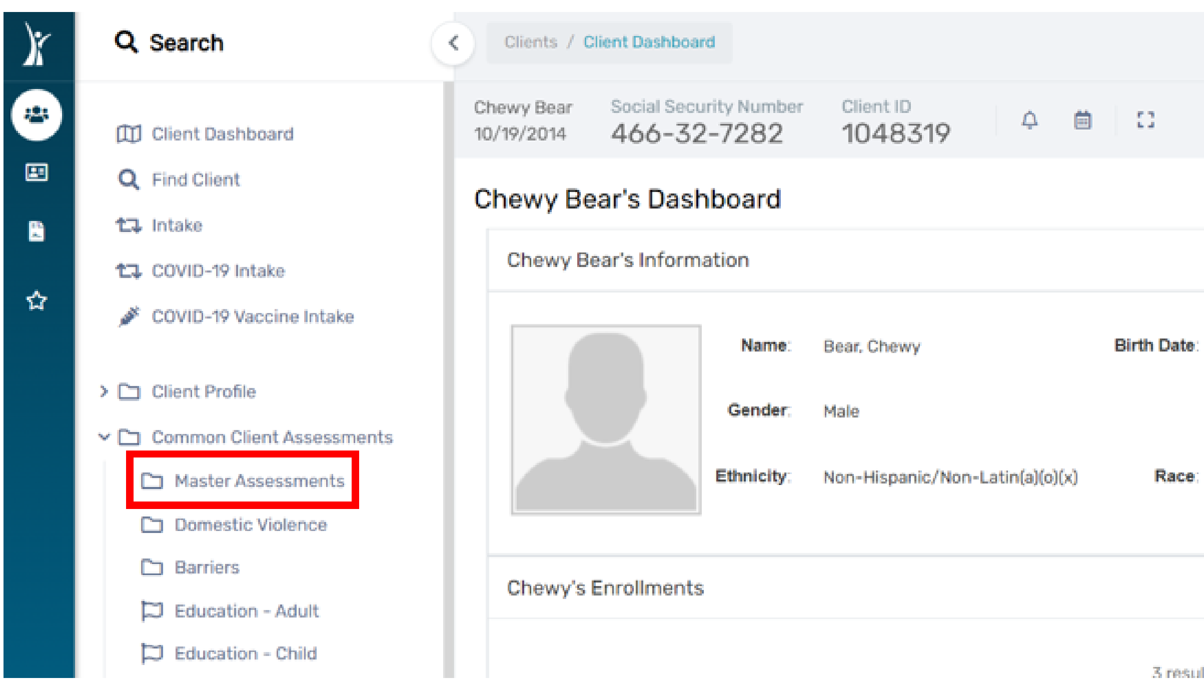
First, you need to know that, according to the 2022 HMIS Data Standards on page 15, *"– Data elements required for collection at annual assessment must be entered with an Information Date of no more than 30 days before or after the anniversary of the head of household's Project Start Date, regardless of the date of the most recent 'update' or any other 'annual assessment'. Information must be accurate as of the Information Date. The data collection stage may not be inferred from the Information Date, although the field must have an Information Date recorded with it. To be considered reportable to HUD as an annual assessment, data must be stored with a Data Collection Stage of 'Annual Assessment'. The Annual Assessment must include updating both the head of household's record and any other family members at the same time."*

In our efforts to improve our data quality, we highly encourage HMIS end user to log an annual assessment 15 days prior or 15 days after the anniversary of the project start date instead of the 60-day window mentioned above. This is to avoid confusion with months that are 31 days long and could negatively impact our data quality if end-users do not log the annual assessment 30 days prior or 30 days after the anniversary of the project start date.

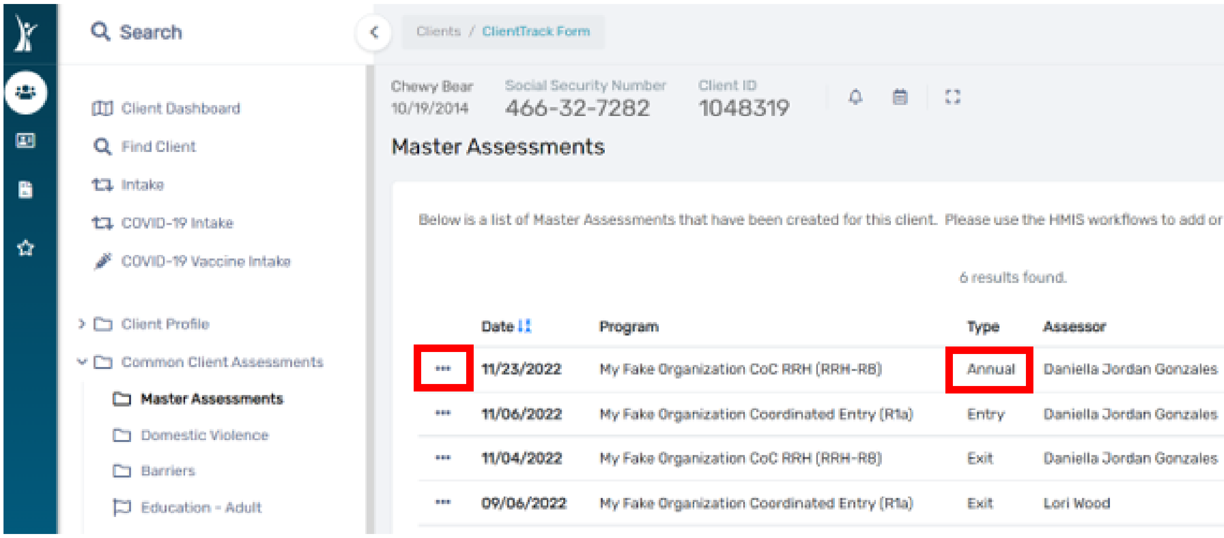
1. To identify the issue, click on the **"Clients"** icon on the blue left-side menu, find your client, and when you are in the client's dashboard click on **"Common Client Assessments"** as shown below.



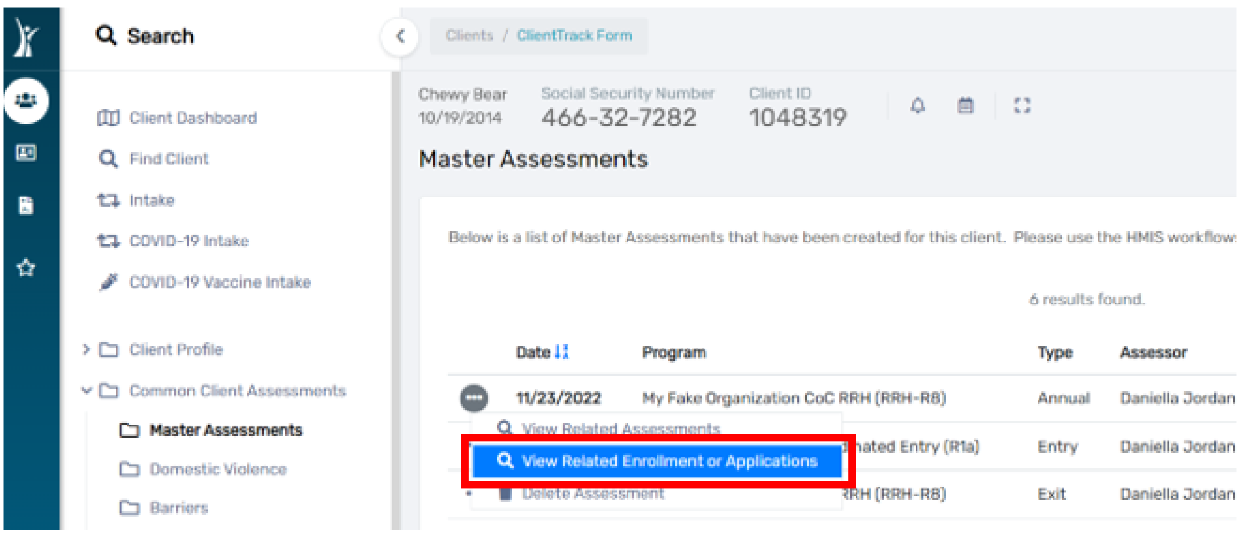
2. A drop-down menu will appear. Click on **"Master Assessments".**



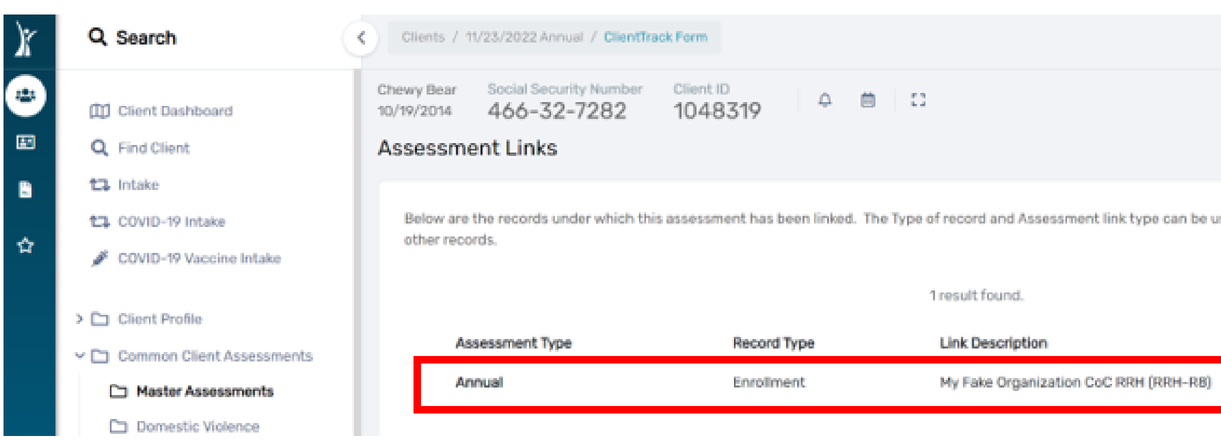
3. Locate the annual assessment (it says "Annual" under the *Type* column) and click on the three dots next to it.



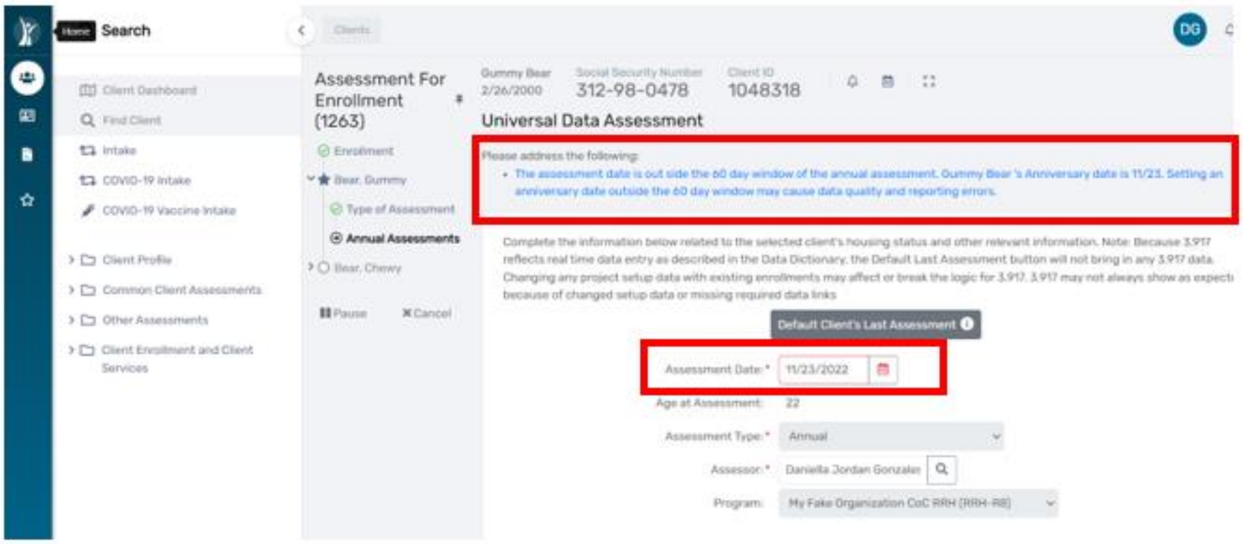
4. Choose **"View Related Enrollment or Applications"** from the drop-down list.



5. If the annual assessment has been completed by filling out the guidelines listed in the HMIS User Manual, then the annual assessment will be attached to the appropriate enrollment as shown below.



6. If this is not the case, then you will not see this and you will need to correct the annual assessment, only if it is within the 60-day window of the project start date. If you can correct this issue, please complete an **"Annual Assessment"** by following the directions in the next section of this manual **"Add New Annual Assessment"**
7. *If you are attempting to enter an annual assessment outside the 60-day window mandate from HUD, meaning, 30 days prior or 30 days after the anniversary of the Project Start Date, then you will get a warning message that reads* ***"The assessment data is out of the 60-day window of the annual assessment, Gummy Bear's Anniversary date is 11/23. Setting an anniversary outside the 60-day window may cause data quality and reporting errors"*** *as shown below.*

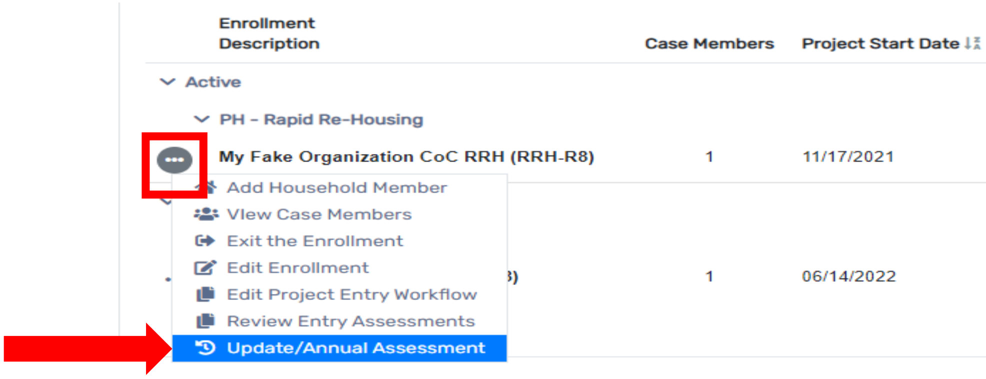


ADD NEW ANNUAL ASSESSMENT

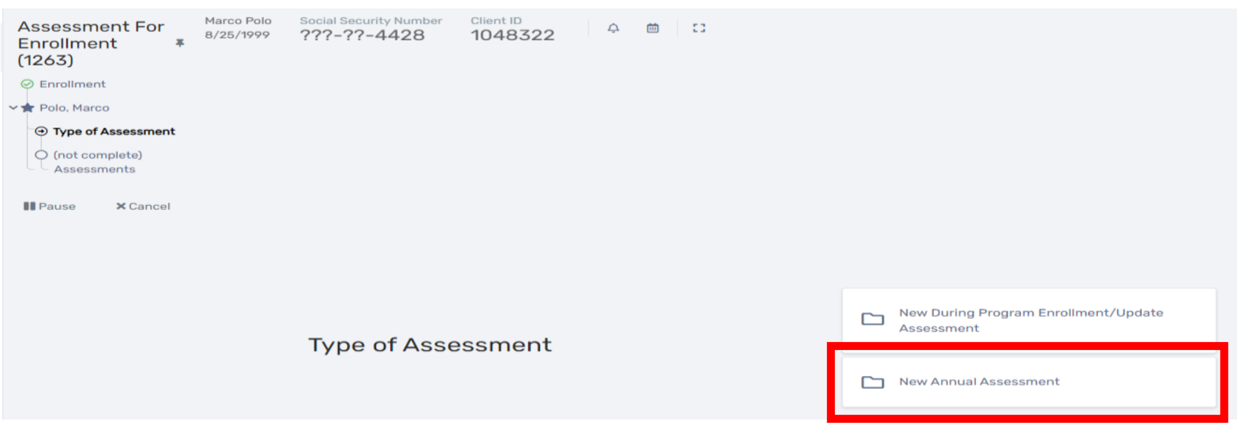
First, you need to know that, according to the [2022 HMIS Data Standards]() on page 15, *"– Data elements required for collection at annual assessment must be entered with an Information Date of no more than 30 days before or after the anniversary of the head of household's Project Start Date, regardless of the date of the most recent 'update' or any other 'annual assessment'. Information must be accurate as of the Information Date. The data collection stage may not be inferred from the Information Date, although the field must have an Information Date recorded with it. To be considered reportable to HUD as an annual assessment, data must be stored with a Data Collection Stage of 'Annual Assessment'. The Annual Assessment must include updating both the head of household's record and any other family members at the same time."*

In our efforts to improve our data quality, we highly encourage HMIS end user to log an annual assessment 15 days prior or 15 days after the anniversary of the project start date instead of the 60-day window mentioned above. This is to avoid confusion with months that are 31 days long and could negatively impact our data quality if end-users do not log the annual assessment 30 days prior or 30 days after the anniversary of the project start date

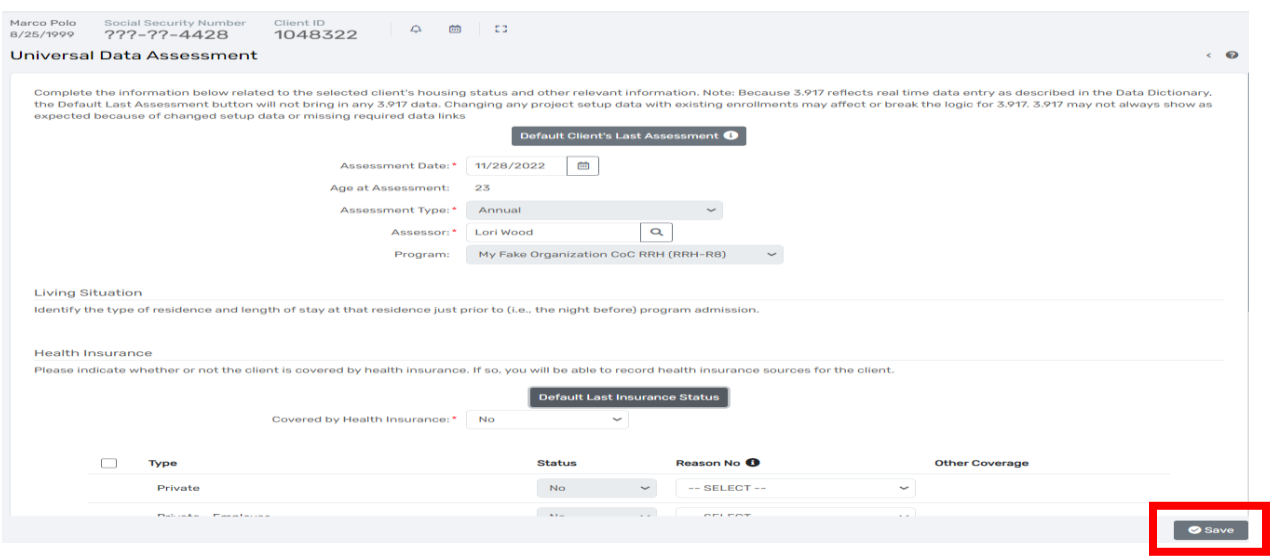
1. From the Client's Dashboard screen, click on the three dots (action icon) located to the left of the enrollment you are adding the annual assessment to.
2. Next, select **"Update/Annual Assessment".**



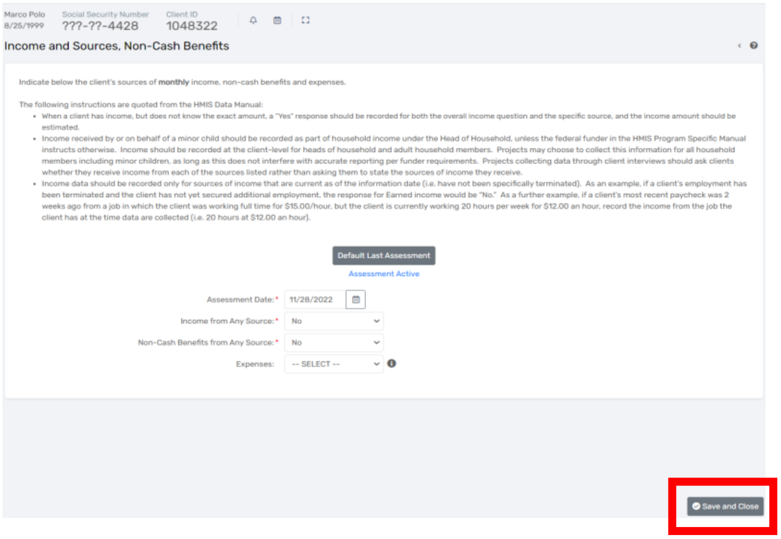
3. The **"HUD Program Enrollment"** screen will display. Select **"No Changes"** in the bottom right corner of the screen.
4. Next, is the **"Type of Assessment"** screen where you will select **"New Annual Assessment"**



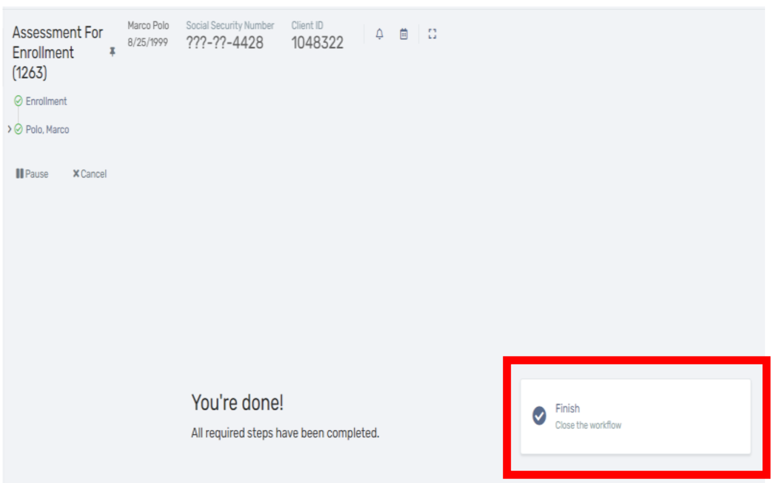
5. Complete the **"Universal Data Assessment"** then select **"Save"**



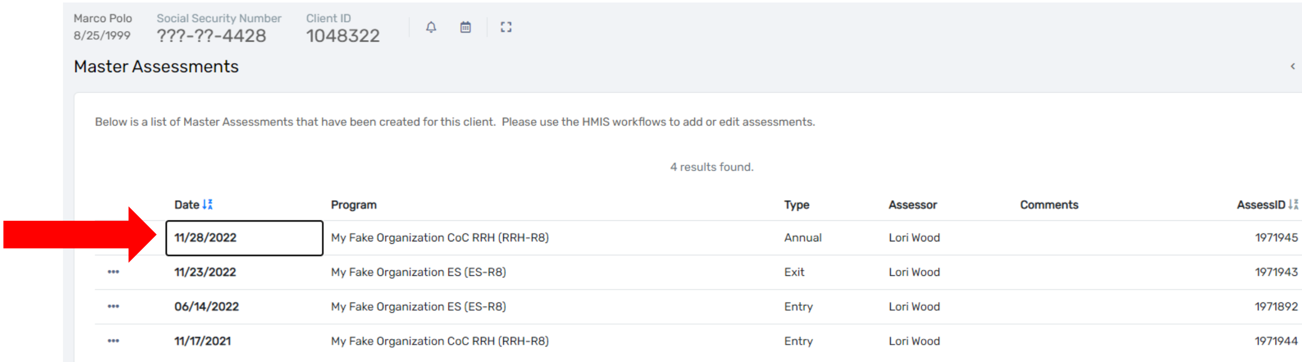
6. Complete the **"Income and Sources, Non-Cash Benefits"** assessment then select **"Save and Close"**



7. To finish the **"Annual Assessment"** click the **"Finish"** box as seen below



8. You will now see the **"Annual Assessment"** reflected under **"Common Client Assessments"/" Master Assessments**" on the Client's Dashboard.

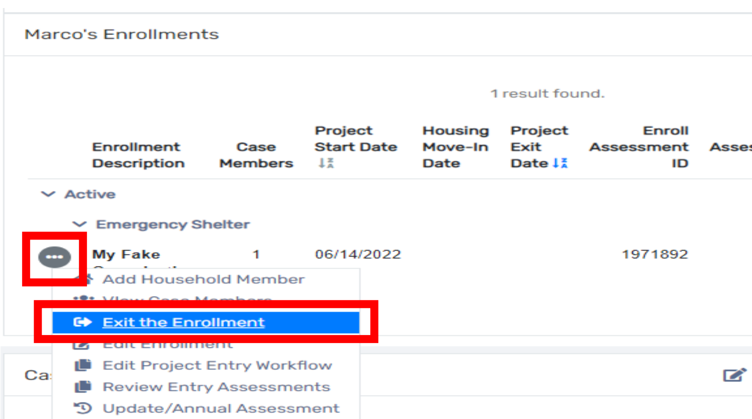


After completing all the updated assessments for the head of household, you will be prompted through the assessments for all enrolled household members. The adult assessments will look like the head of household's assessments. The Update/Annual Assessment will look differently for children.

PROGRAM DISCHARGE

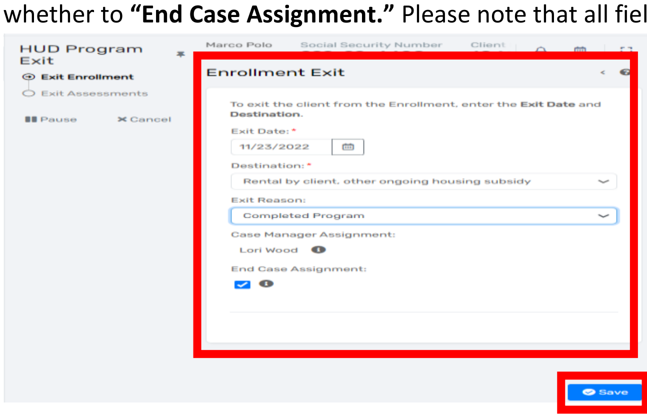
When a client has transitioned from your project or is no longer receiving services for any reason, you will discharge the client from your program in ClientTrack with the following steps:

- Go to the client record.



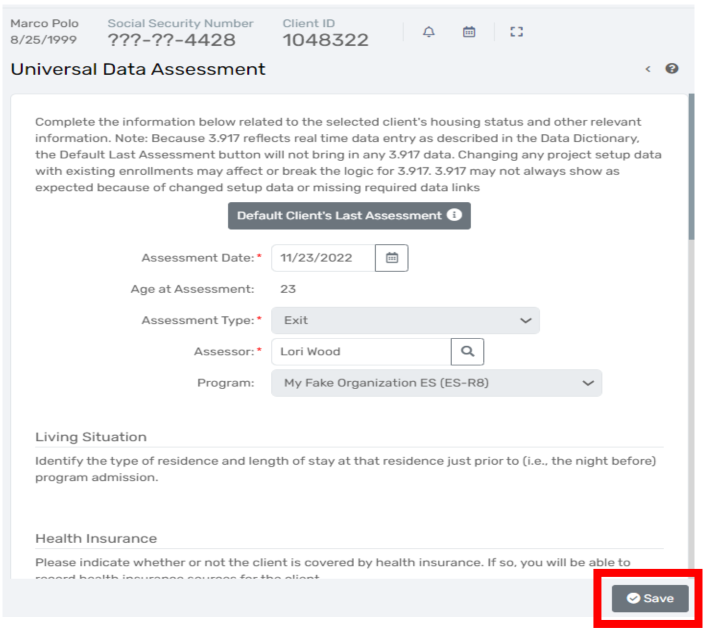
- On the Client's Dashboard, click on the three dots (action icon) beside your project enrollment. Select **"Exit the Enrollment"** in the drop-down list and complete the information for the Exit workflow and save as you go.

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.



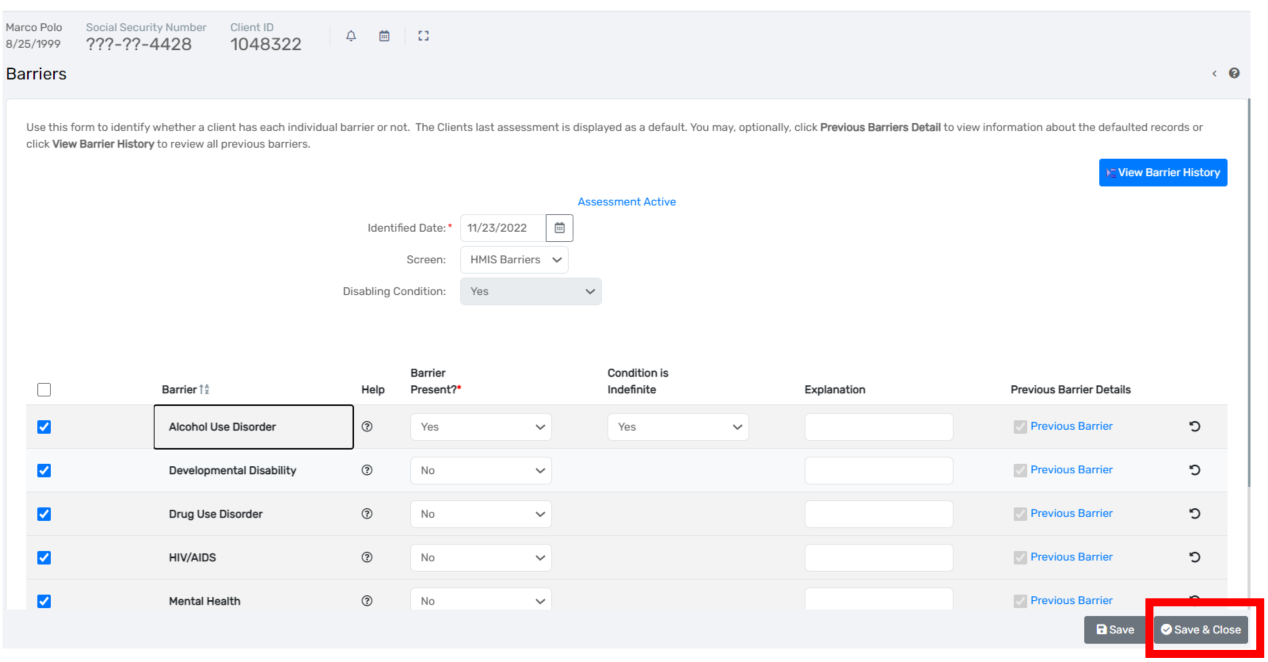
HMIS UNIVERSAL DATA ASSESSMENT FOR EXIT WORKFLOW

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.



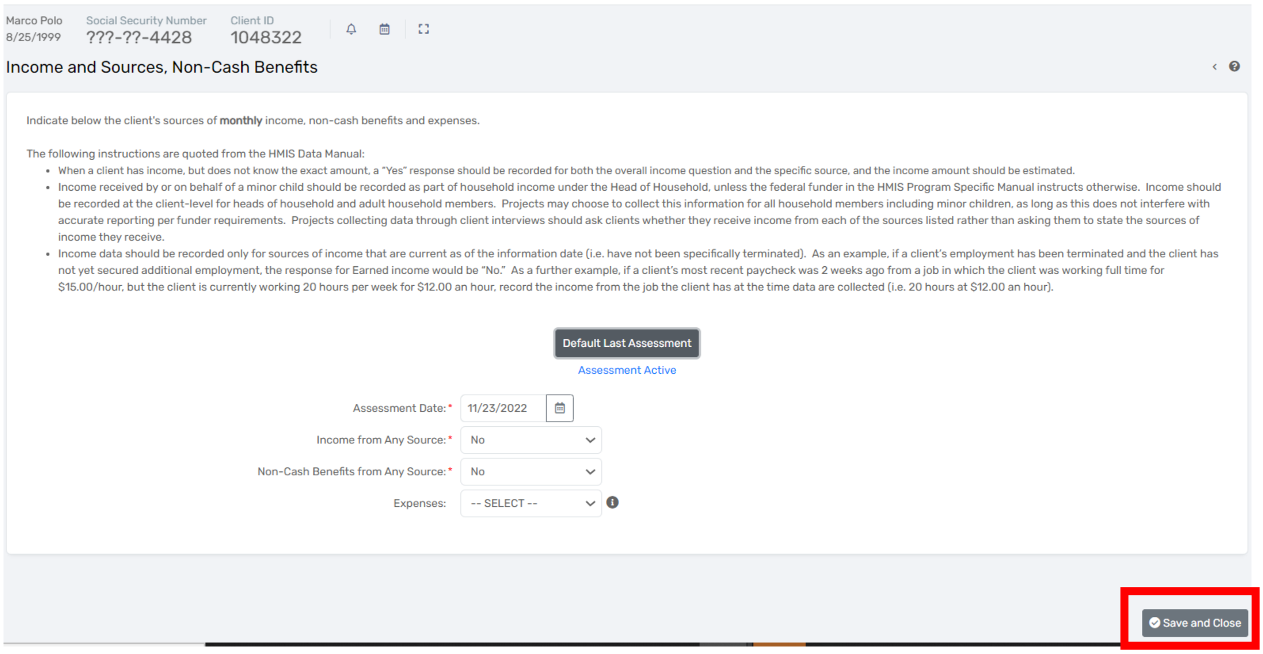
HMIS BARRIERS ASSESSMENT FOR EXIT WORKFLOW

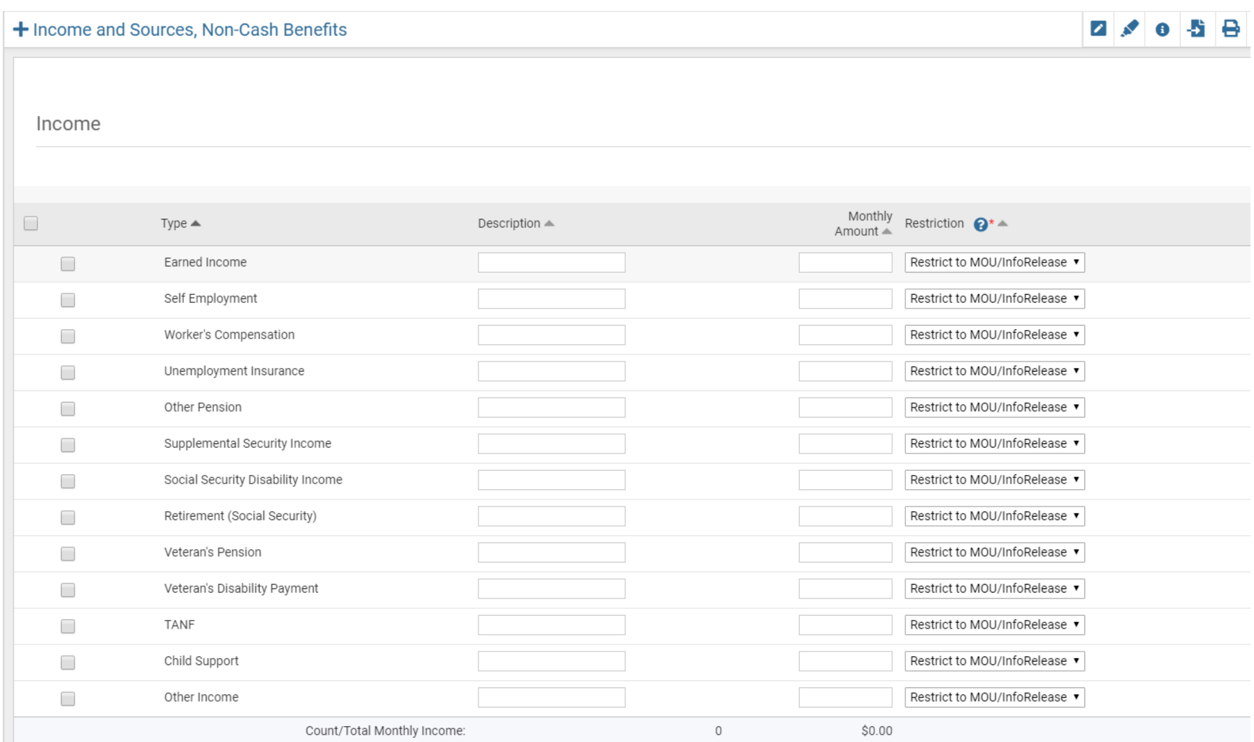
You will be required to complete the HMIS Barriers Assessment at exit. The built-in logic may create additional required fields. Select a barrier by clicking on the box beside it if a barrier is present at exit. If the client has no changes in barriers since their most recent assessment, click on **"Save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



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.

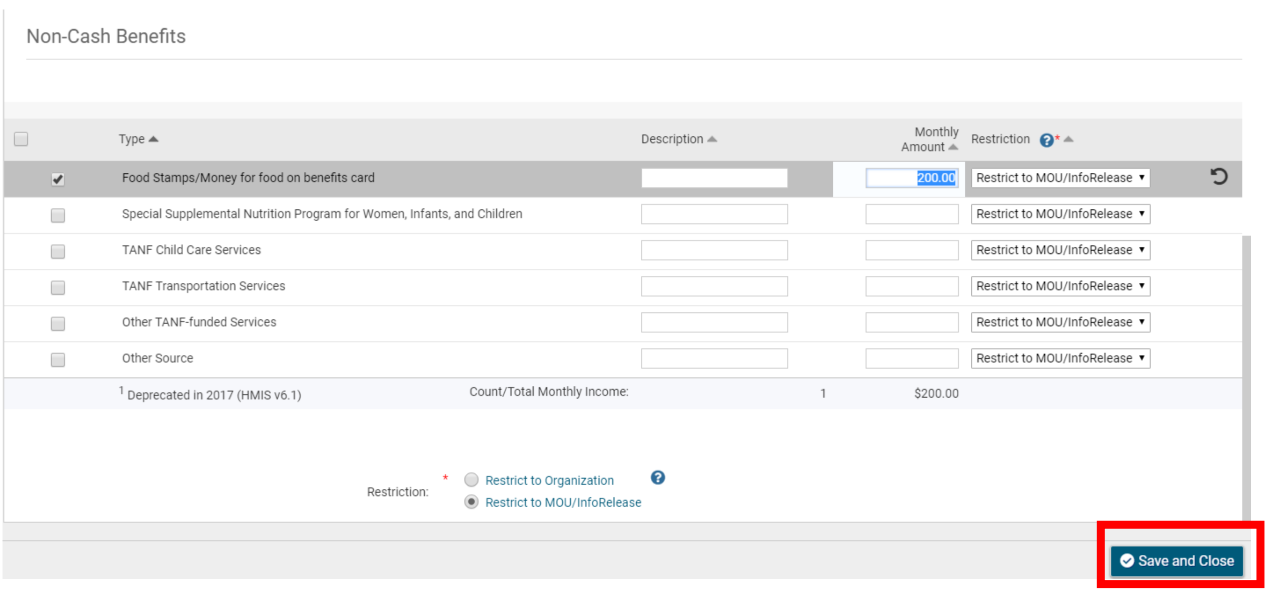




Definitions of Sources of Income

- **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

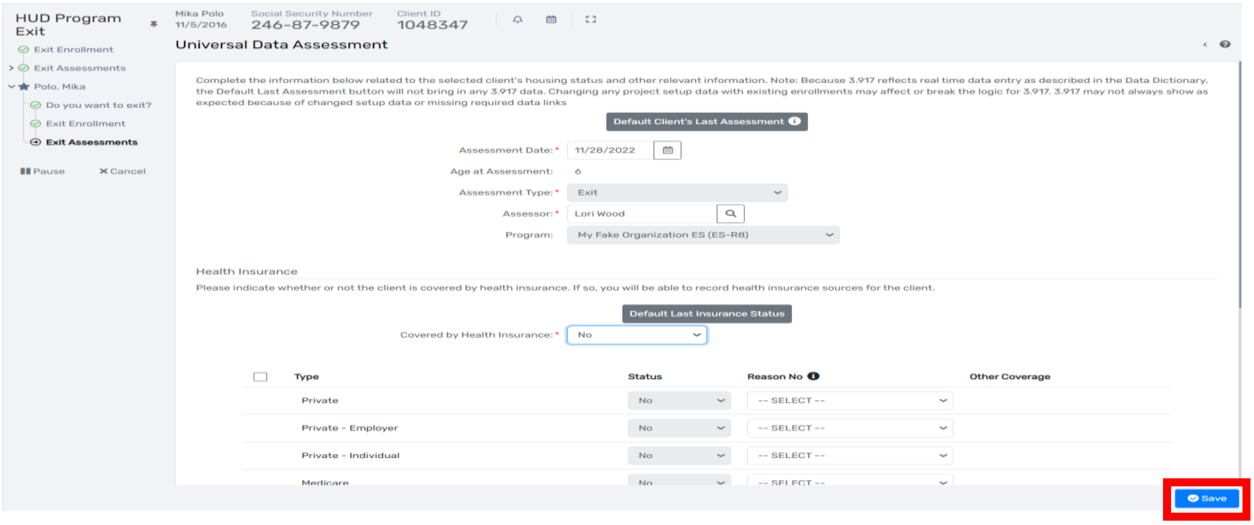


Definitions of Non-Cash Benefits

- **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

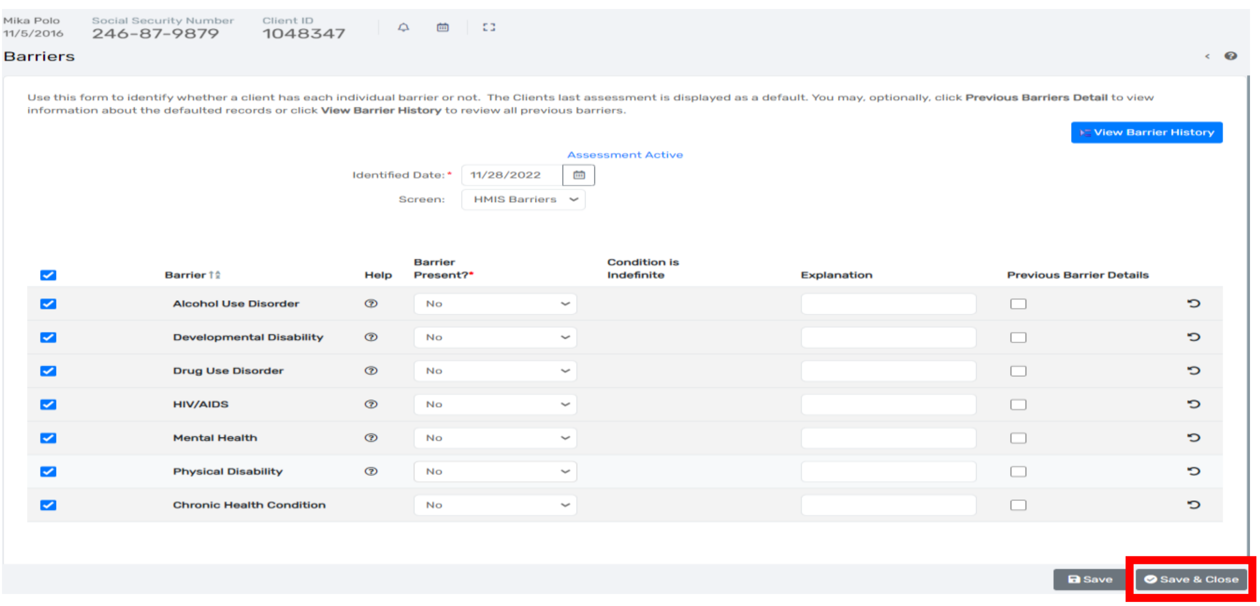
HMIS UNIVERSAL DATA ASSESSMENT FOR CHILD AT EXIT

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



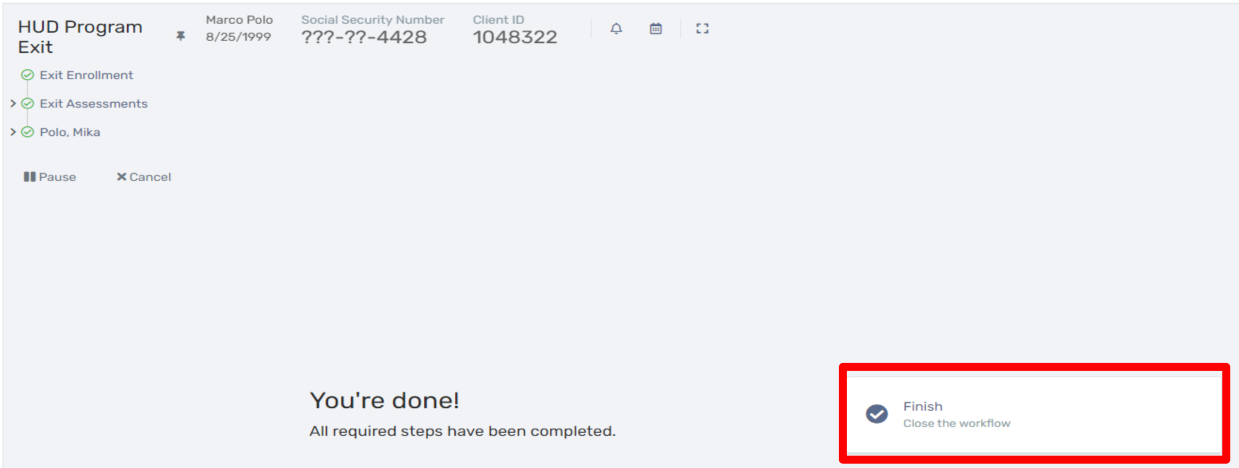
HMIS BARRIERS ASSESSMENT FOR CHILD AT EXIT

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

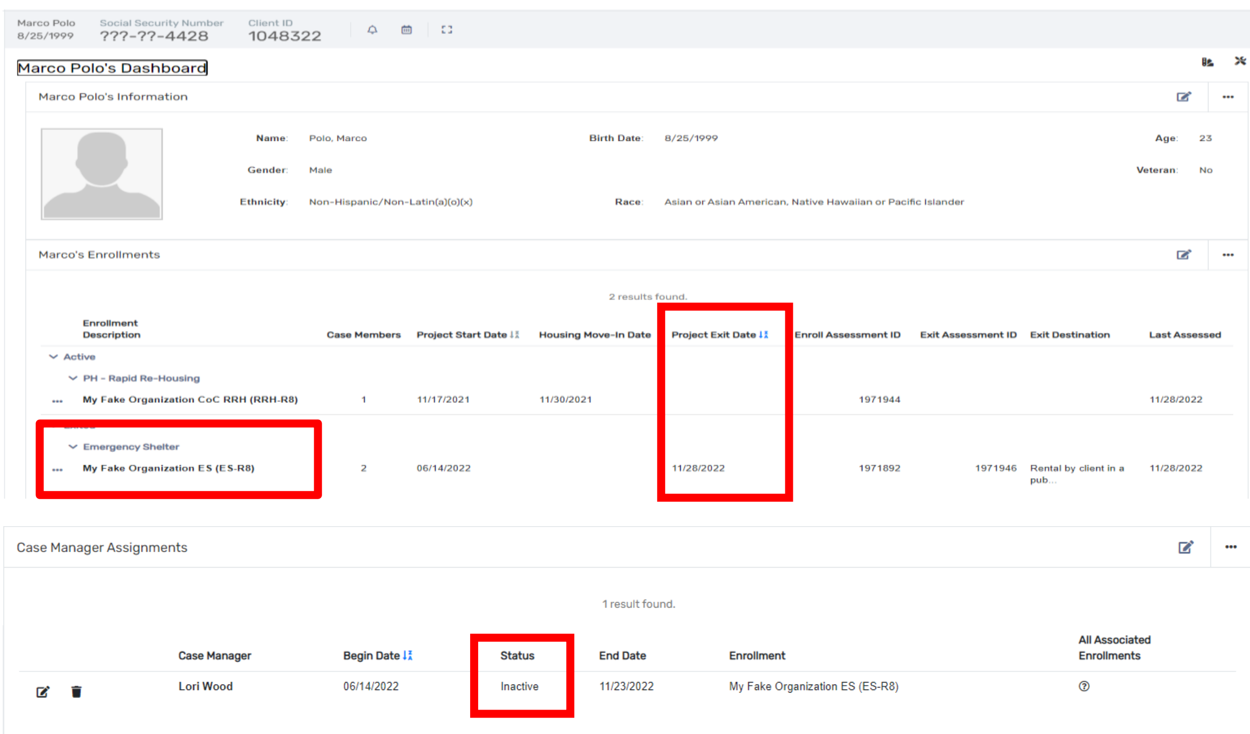


COMPLETING THE EXIT WORKFLOW

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.



You will then return to the client dashboard where you can see the project exit dates as seen below. If you 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 three dots (action icon) beside your name under "**Case Manager"** to edit your status to **"Inactive"** to remove the discharged client from your case load.



Unique Program Requirements at Exit

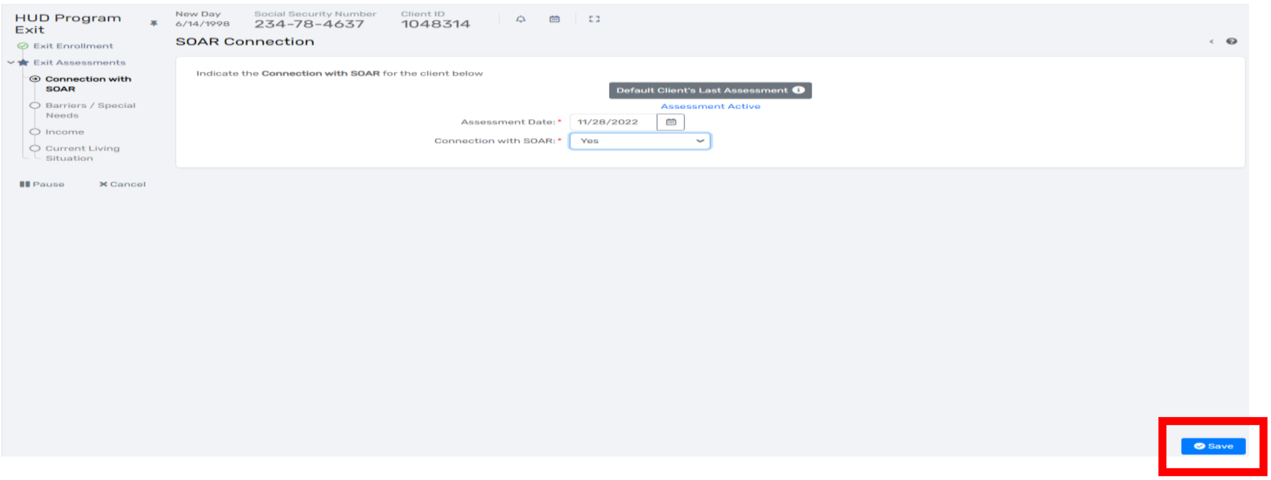
There are variations in data requirements for different program exits. Below are screenshots of the unique discharge requirements during the exit workflow for the following programs:

1. PATH

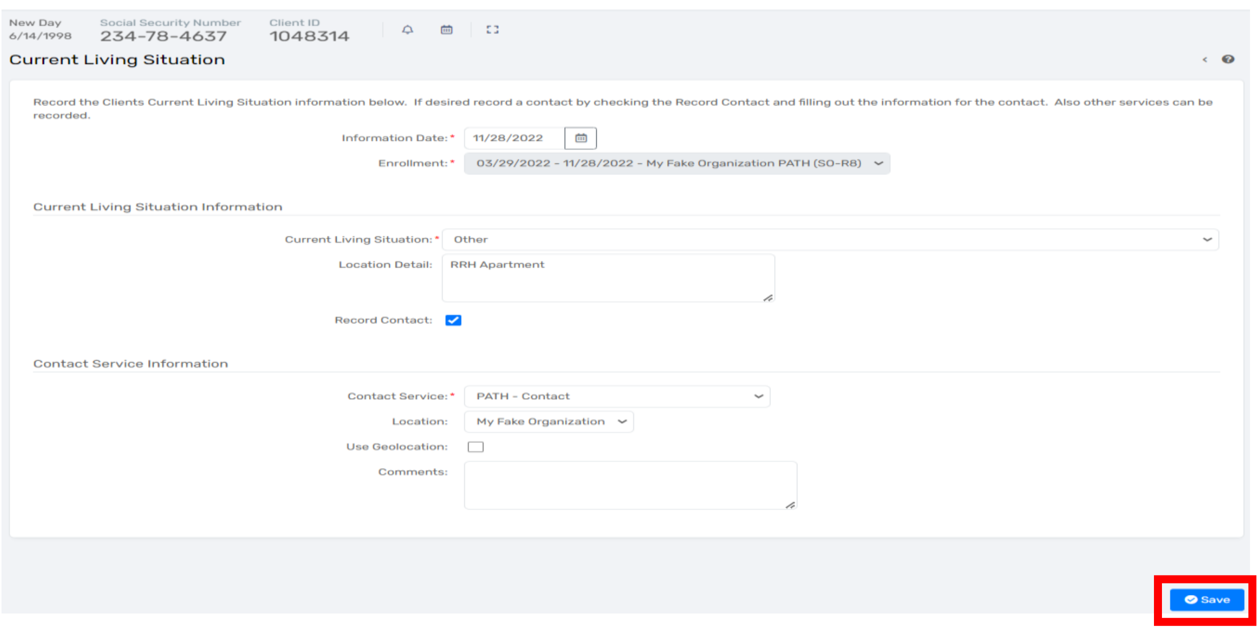
2. HOPWA
3. RHY

PATH AT EXIT

The client's **Connection with SOAR** will be asked again at exit. Complete the information and click **"Save"** to continue in the exit workflow.

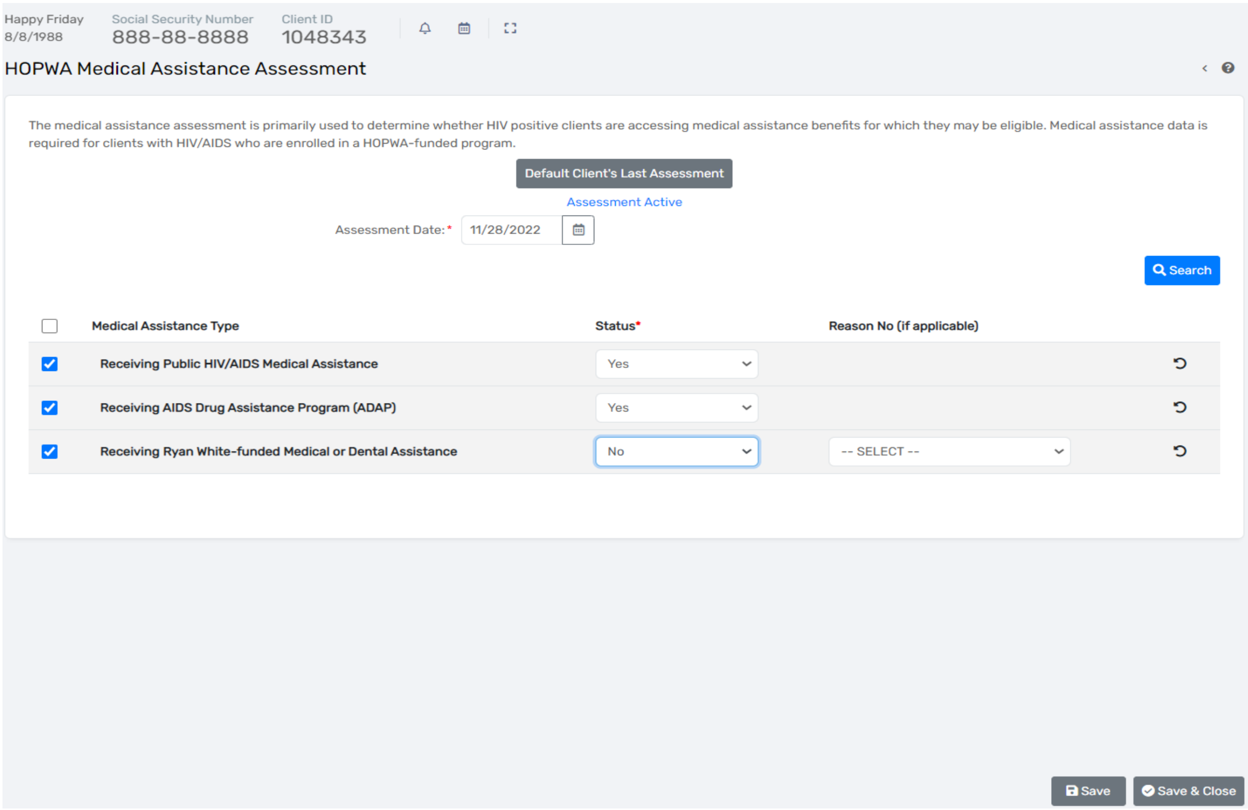


Enter the **Current Living Situation** information for the client and click **"Save"** to proceed in the exit workflow. This will conclude the PATH specific data requirements for a client at exit.

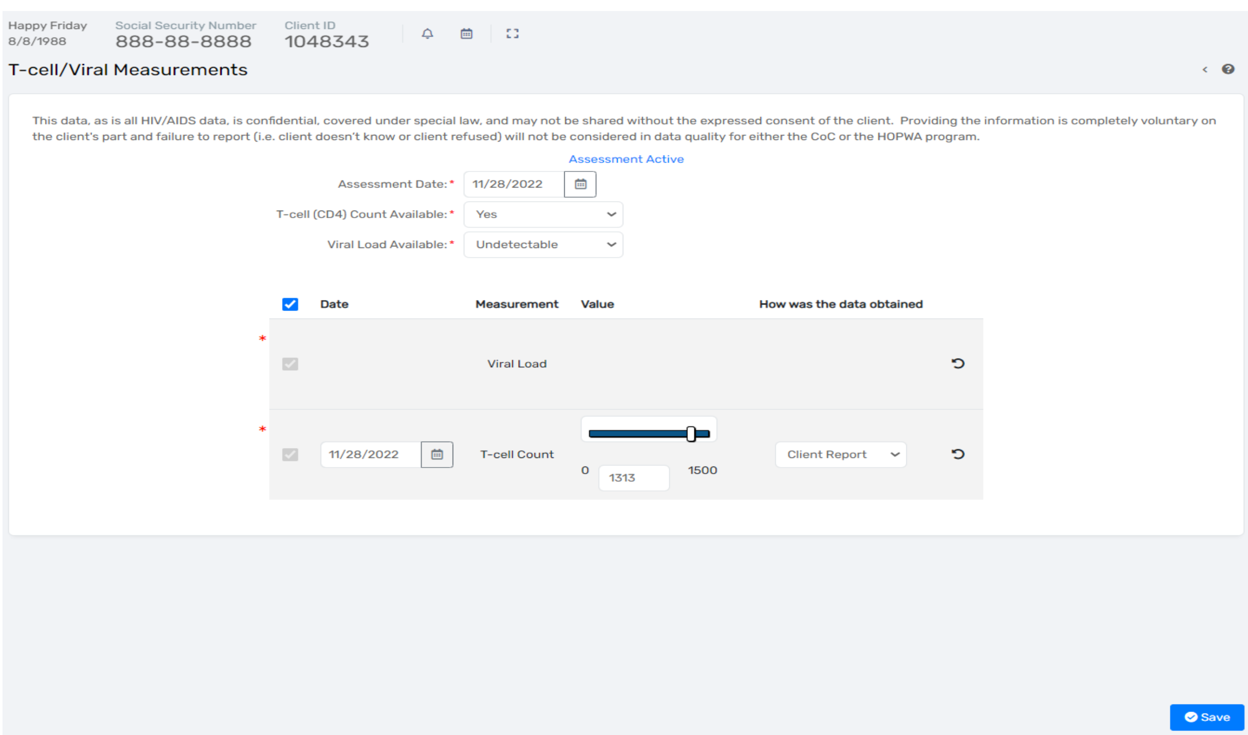


HOPWA AT EXIT

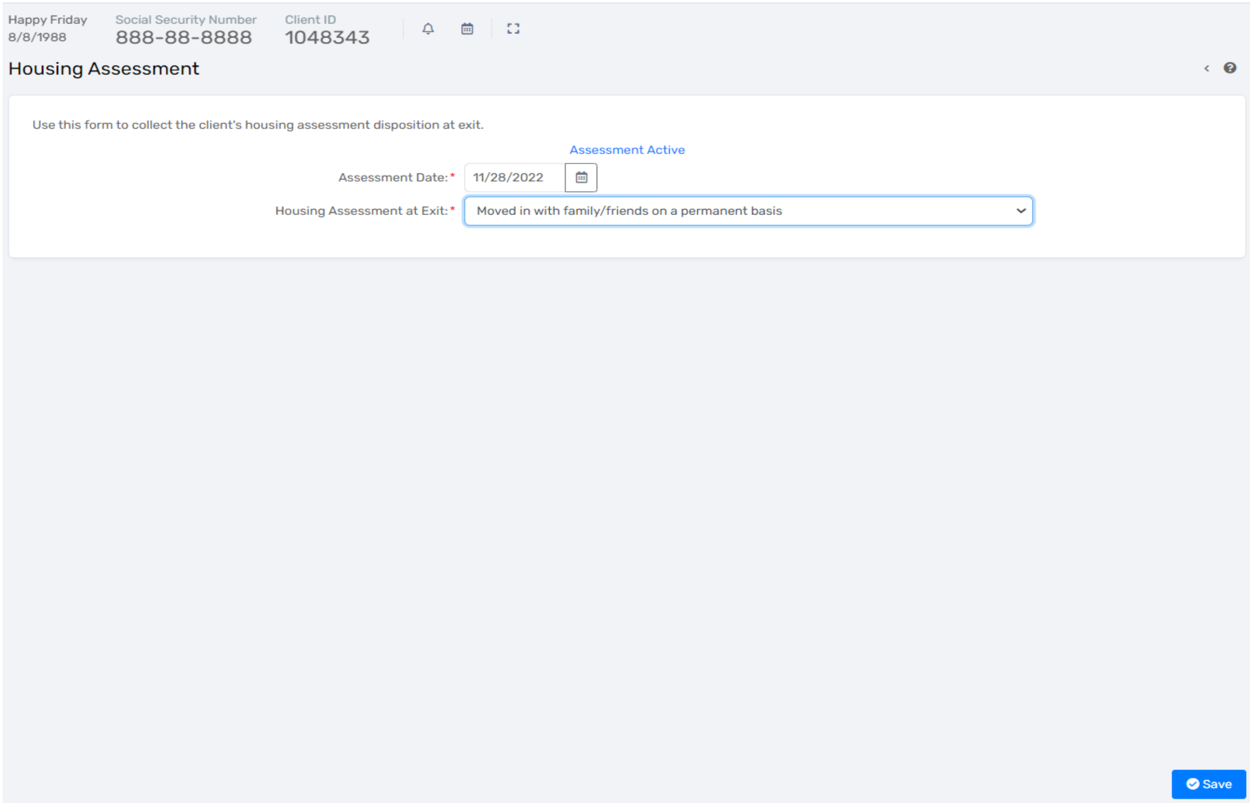
A completed **"HOPWA Medical Assistance Assessment"** will be required at exit for HOPWA.



T-Cell Count and **Viral Load** data will also be required at exit for the client when being discharged from HOPWA.



A **Housing Assessment** will be required at exit for HOPWA clients as seen below. This will complete the HOPWA program specific data requirements at exit.

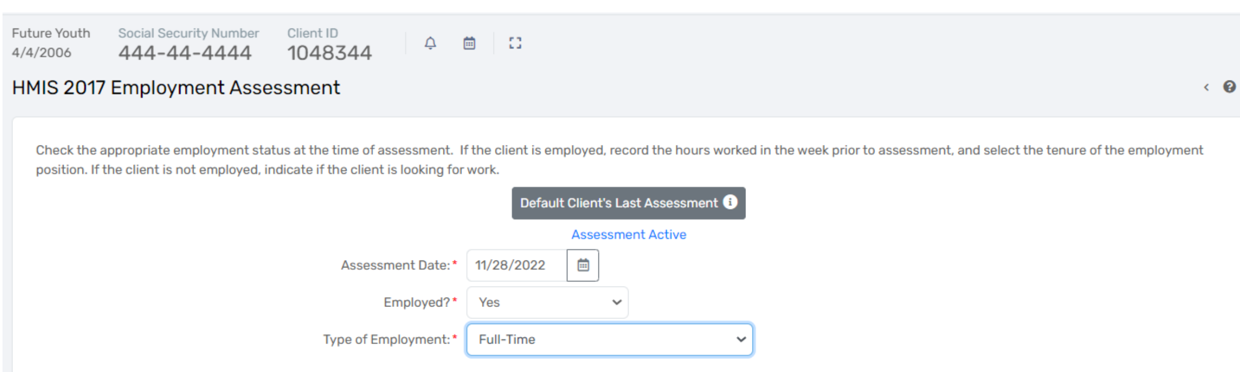


RHY AT EXIT

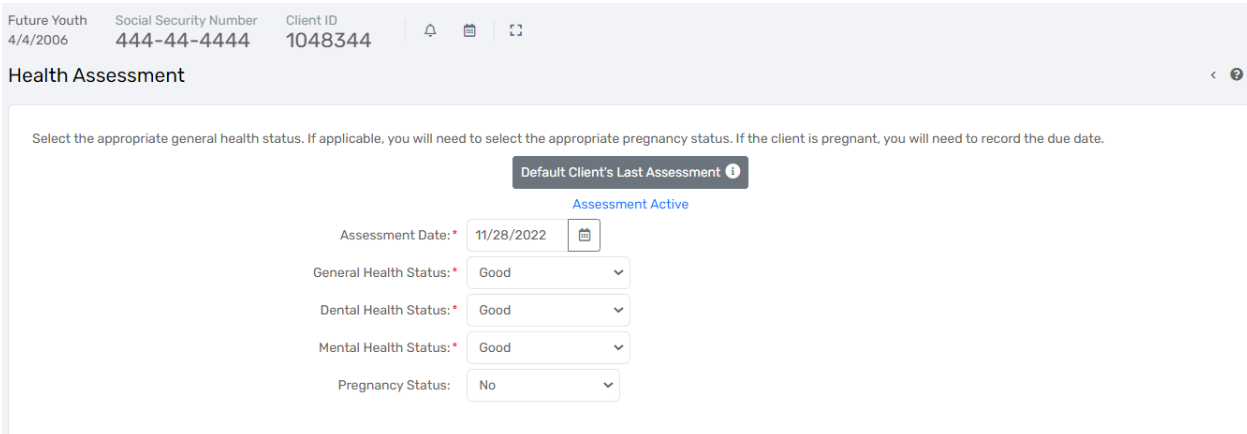
In addition to the standard exit assessments, RHY clients will complete the following exit assessments:

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

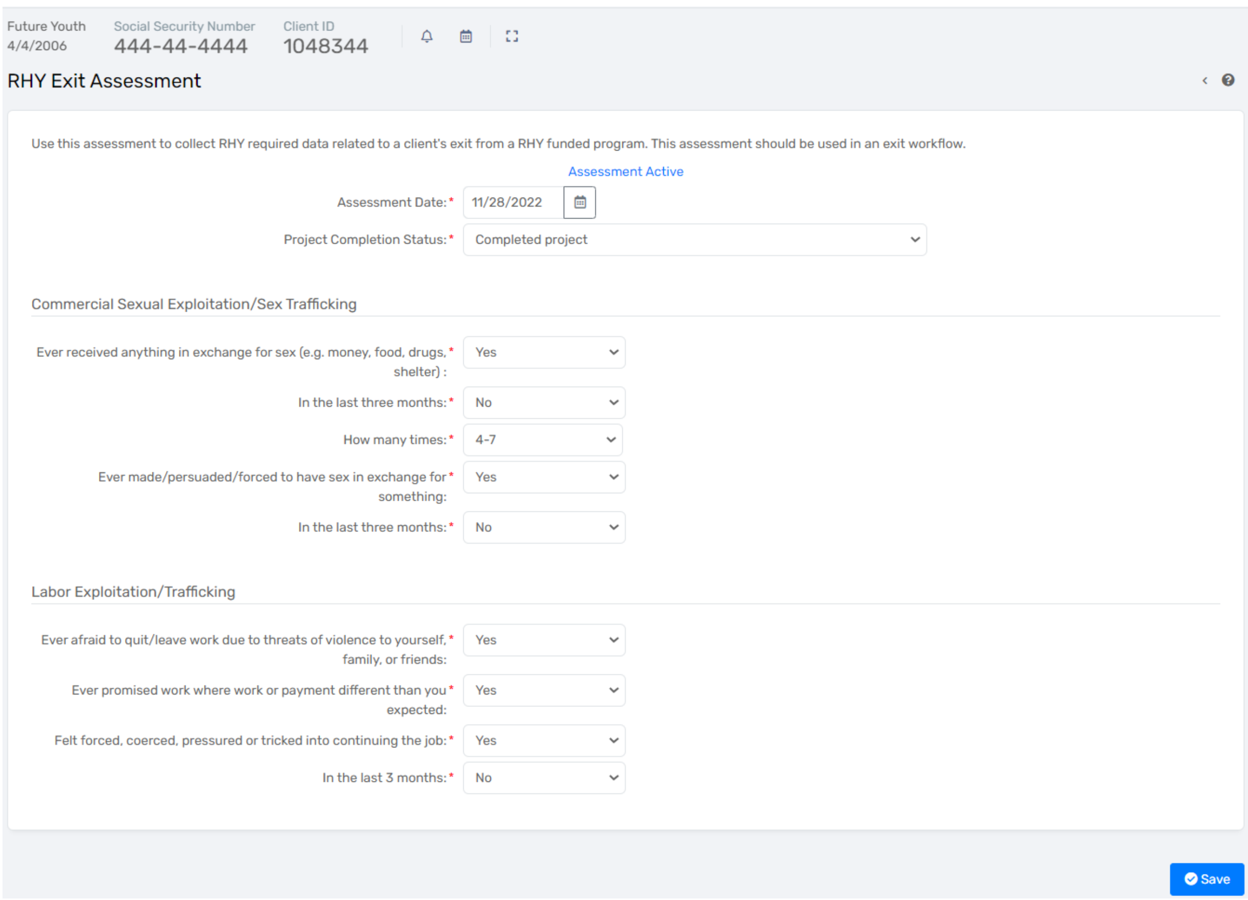
Employment Assessment – The built-in logic will require additional information depending on the client's employment status. Click **"Save"** to continue.



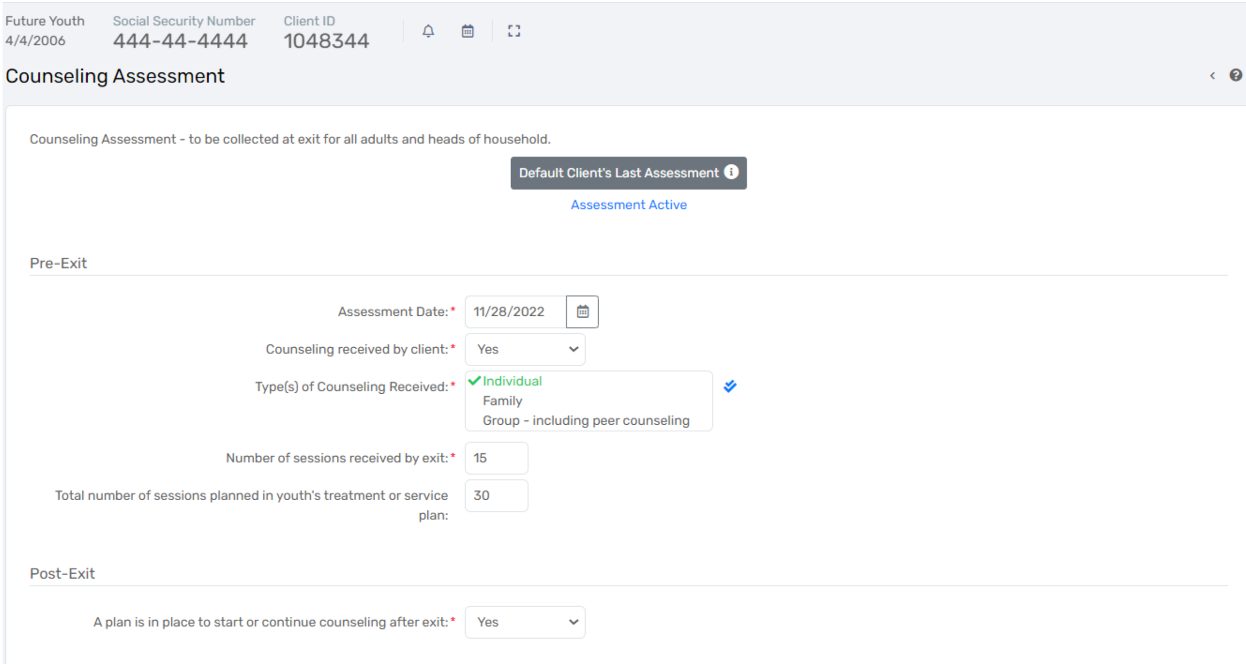
Health Assessment - Complete the required data and click **"Save"** to continue.



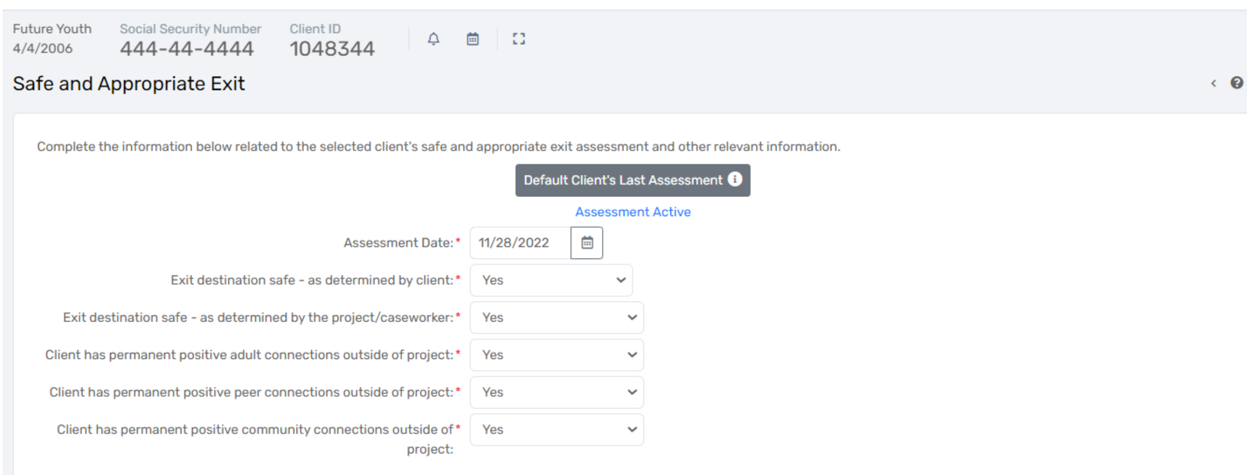
RHY Exit Assessment – The built-in logic will require additional information depending on the client's responses. To move forward on this assessment, click all the **"Actions"** and change the default **"Action Status"** to **"Yes"** for those follow up items accomplished. Click **"Save"** to complete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



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



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



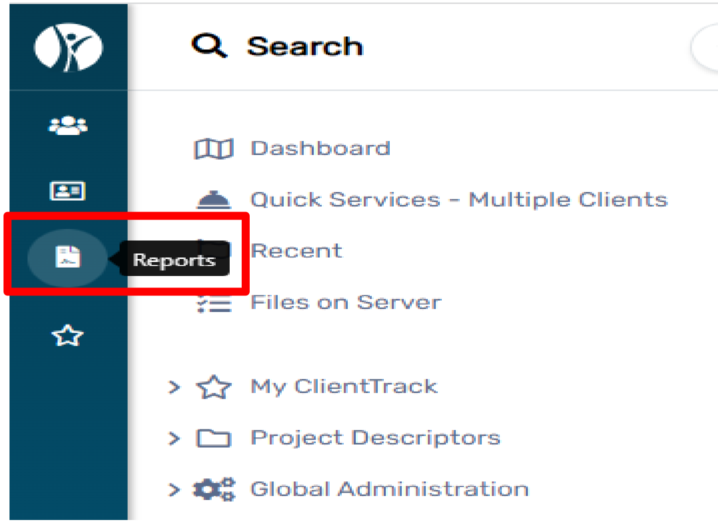
BASIC REPORTS

SERVICE SUMMARY REPORT

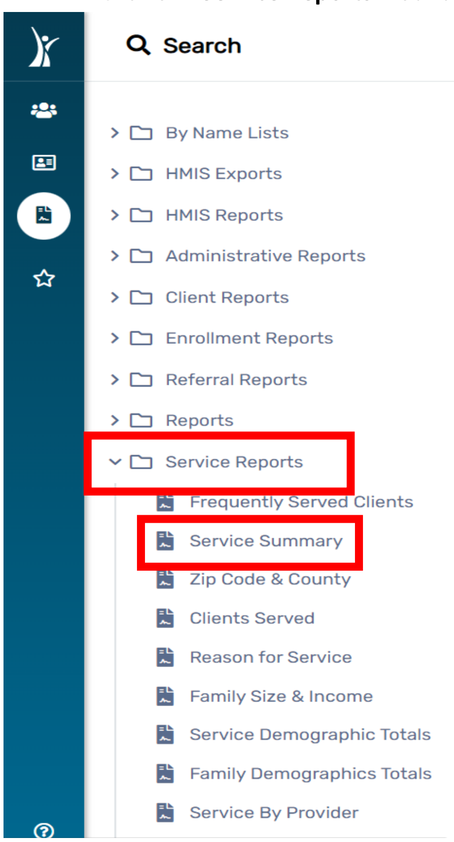
The Service Summary Report is a report of the services your agency has provided for clients enrolled in a specific program. You can run a Service Summary Report a variety of ways to extract specific service information from client records, for example services rendered in the month of December or Case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

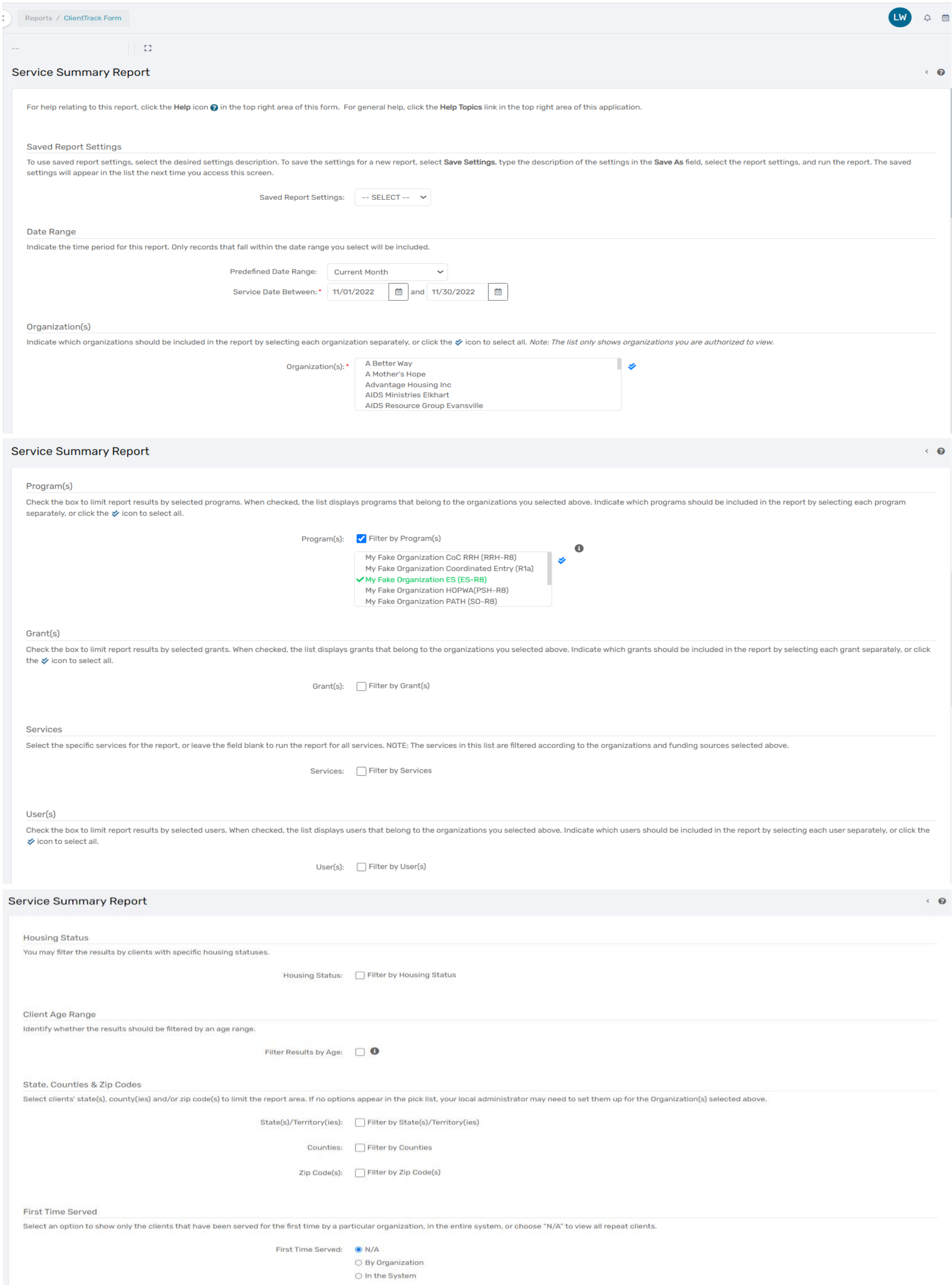
- Click on the **"Reports"** icon  found in the left-hand menu.

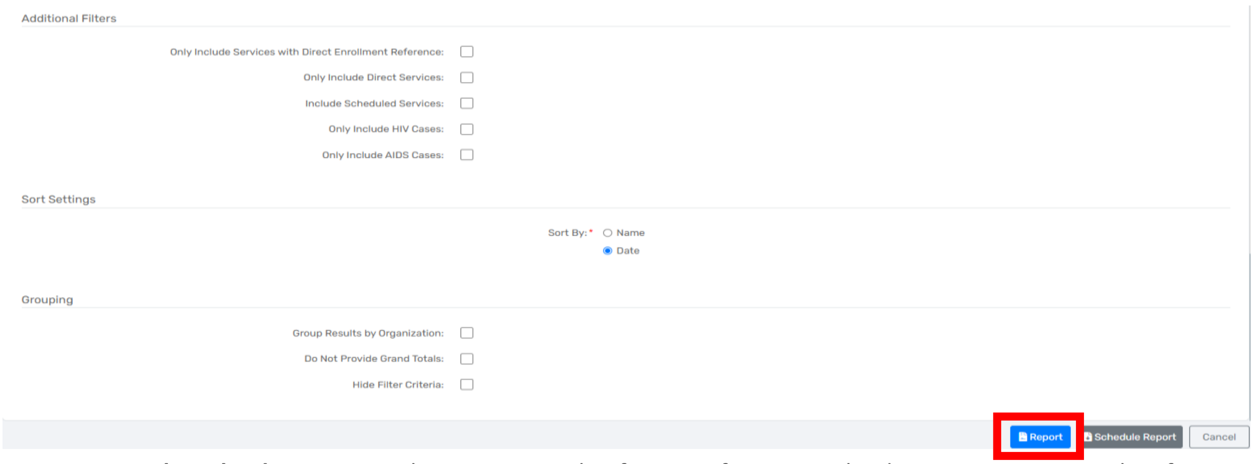


- Click on **"Service Reports"** found in the left-hand menu. Next, click on **"Service Summary"**

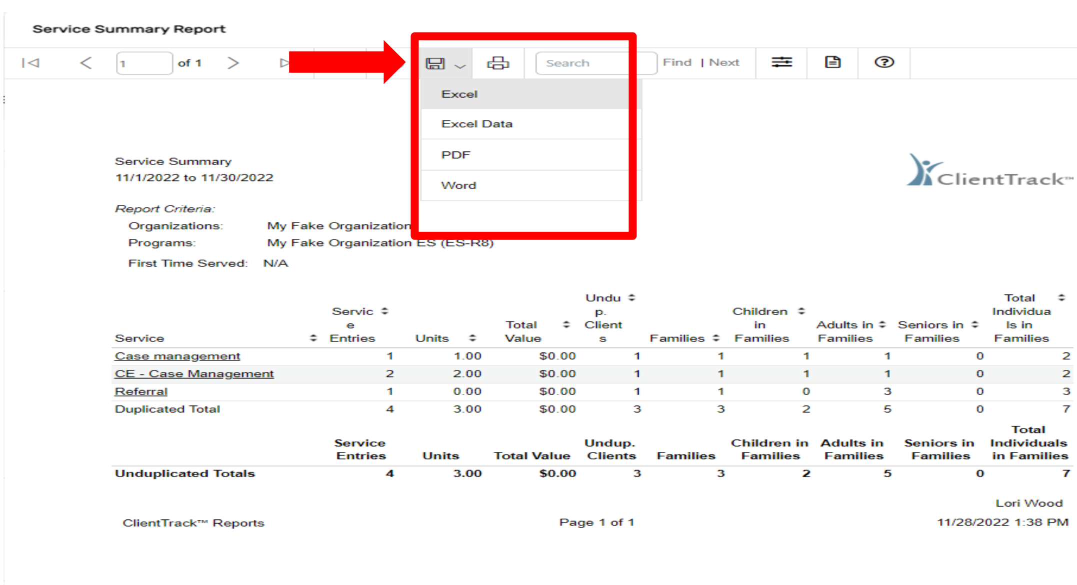


- Set up your report parameters by: *(Please note that all fields with an asterisk * are required fields)*


Reports / ClientTrack Form
LW
Service Summary Report
For help relating to this report, click the Help icon in the top right area of this form. For general help, click the Help Topics link in the top right area of this application.
Saved Report Settings
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:* 11/01/2022 and 11/30/2022
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):*
A Better Way
A Mother's Hope
Advantage Housing Inc
AIDS Ministries Elkhart
AIDS Resource Group Evansville
Service Summary Report
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)
My Fake Organization CoC RRH (RRH-R8)
My Fake Organization Coordinated Entry (R1a)
My Fake Organization ES (ES-R8)
My Fake Organization HOPWA(PSH-R8)
My Fake Organization PATH (SO-R8)
Grant(s)
Check the box to limit report results by selected grants. When checked, the 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.
Grant(s): Filter by Grant(s)
Services
Select the specific services for the report, or leave the field blank to run the report for all services. NOTE: The services in this list are filtered according to the organizations and funding sources selected above.
Services: Filter by Services
User(s)
Check the box to limit report results by selected users. When checked, the list displays users that belong to the organizations you selected above. Indicate which users should be included in the report by selecting each user separately, or click the icon to select all.
User(s): Filter by User(s)
Service Summary Report
Housing Status
You may filter the results by clients with specific housing statuses.
Housing Status: Filter by Housing Status
Client Age Range
Identify whether the results should be filtered by an age range.
Filter Results by Age:
State, Counties & Zip Codes
Select clients' state(s), county(ies) and/or zip code(s) to limit the report area. If no options appear in the pick list, your local administrator may need to set them up for the Organization(s) selected above.
State(s)/Territory(ies): Filter by State(s)/Territory(ies)
Counties: Filter by Counties
Zip Code(s): Filter by Zip Code(s)
First Time Served
Select an option to show only the clients that have been served for the first time by a particular organization, in the entire system, or choose "N/A" to view all repeat clients.
First Time Served: N/A
By Organization
In the System



- **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.
- **You may 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.
- 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



Service Summary
11/1/2022 to 11/30/2022

Report Criteria:
Organizations: My Fake Organization
Programs: My Fake Organization ES (ES-R8)
First Time Served: N/A

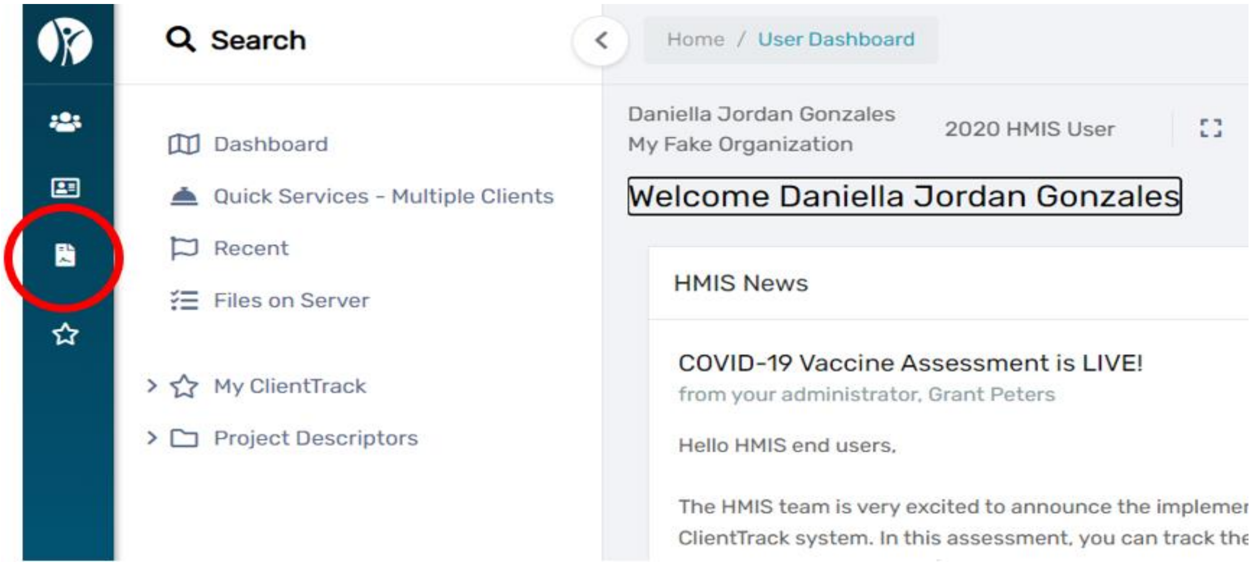
Service	Service Entries	Units	Total Value	Undup. Clients	Families	Children in Families	Adults in Families	Seniors in Families	Total Individuals in Families
Case management	1	1.00	$0.00	1	1	1	1	0	2
CE - Case Management	2	2.00	$0.00	1	1	1	1	0	2
Referral	1	0.00	$0.00	1	1	0	3	0	3
Duplicated Total	4	3.00	$0.00	3	3	2	5	0	7
Unduplicated Totals	4	3.00	$0.00	3	3	2	5	0	7

Lori Wood
ClientTrack™ Reports Page 1 of 1 11/28/2022 1:38 PM

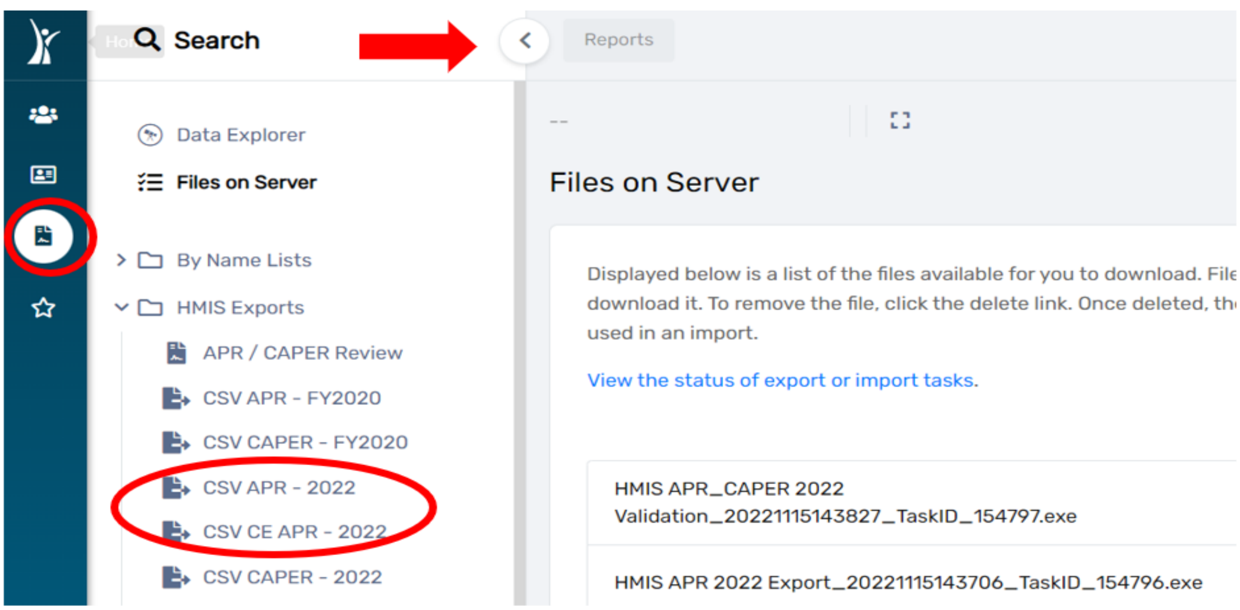
ANNUAL PERFORMANCE REPORT (APR) AND CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT (CAPER)

Running the Export

1. Login under **"2020 HMIS User"** and click on the file icon on the left-hand side menu as shown below to access the "**Reports".**

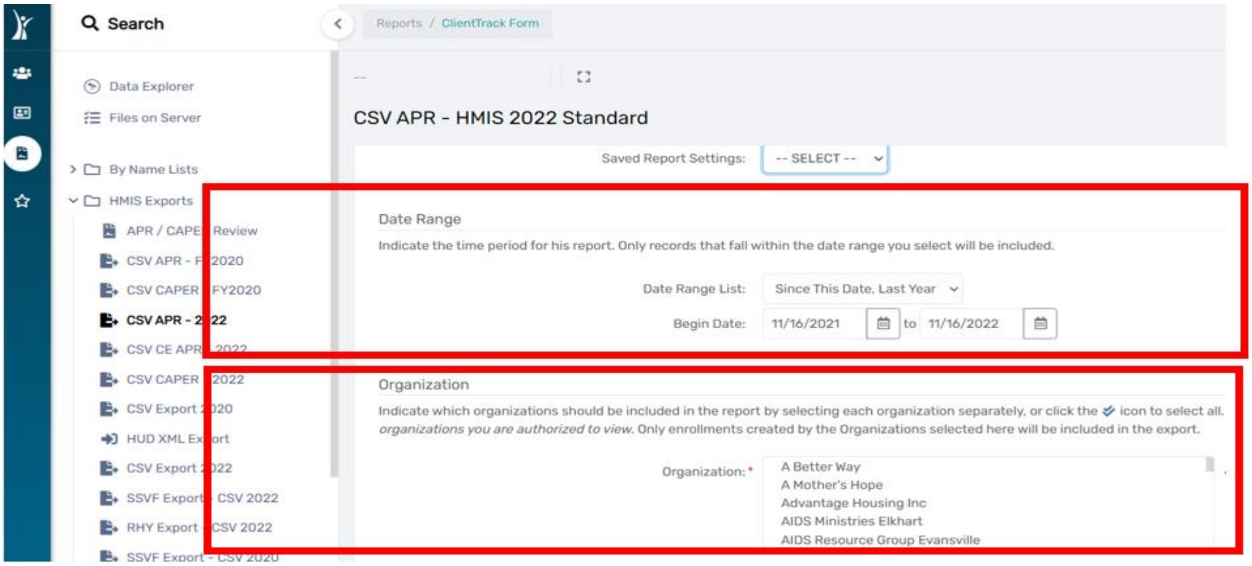


2. Once in the "Reports" workspace, click **HMIS Exports** from the white left-hand side menu as shown below. Make sure the white left-side menu is expanded by clicking on the back arrow at the top. A drop-down menu will appear. Select **"CSV APR -2022"** or **"CSV CAPER – 2022"** as shown below.

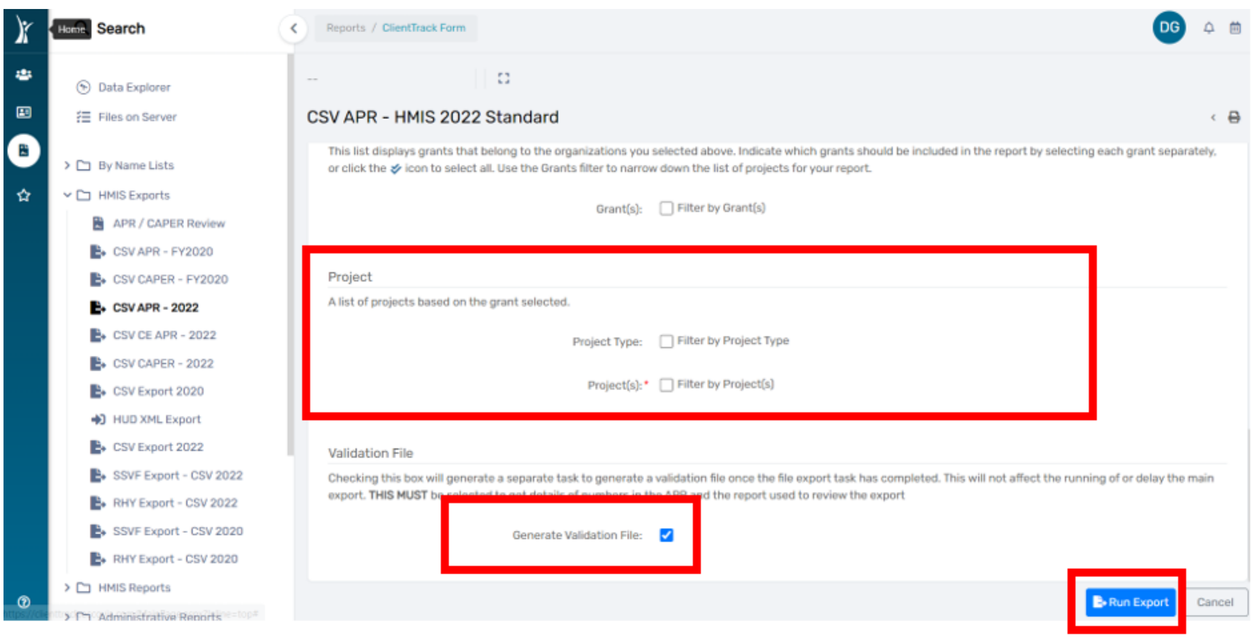


Setting Export Parameters

3. Set up the export parameters by entering the date range with a predefined option in the drop-down list or enter the date range in the **"Begin Date"** field. Your organization will auto populate.



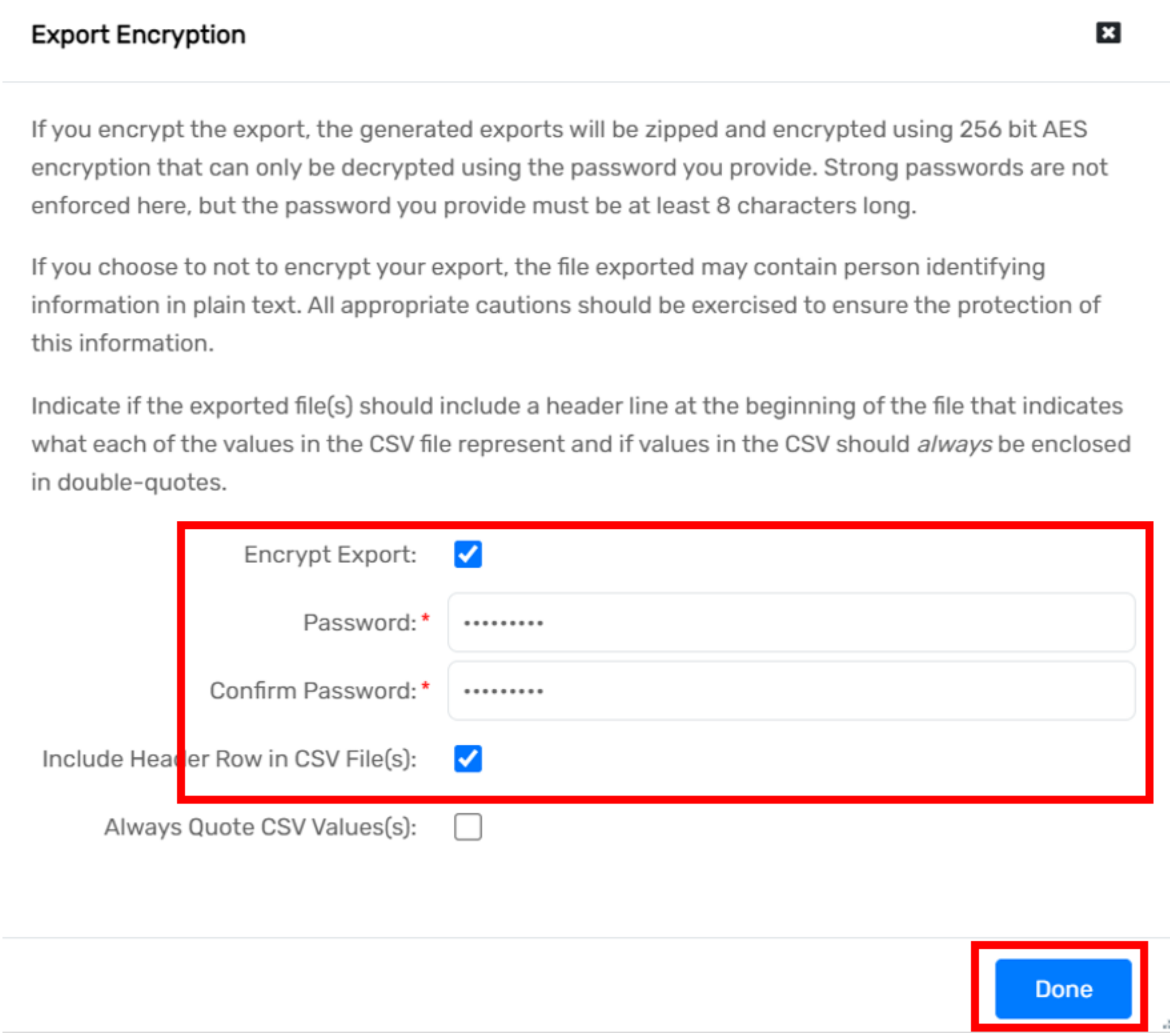
4. Select the "**Project Type" and "Project (Name)"** for the export. Also select **"Generate Validation File"** by clicking on the checkbox. A check mark should appear when this option is selected successfully.



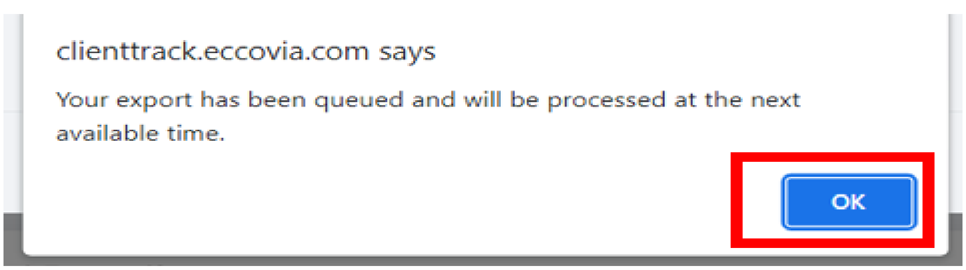
5. Click on **"Run Export"** in the bottom right-hand corner to begin the data export for your program.

[Accessing Export Files & Report Preparation]()

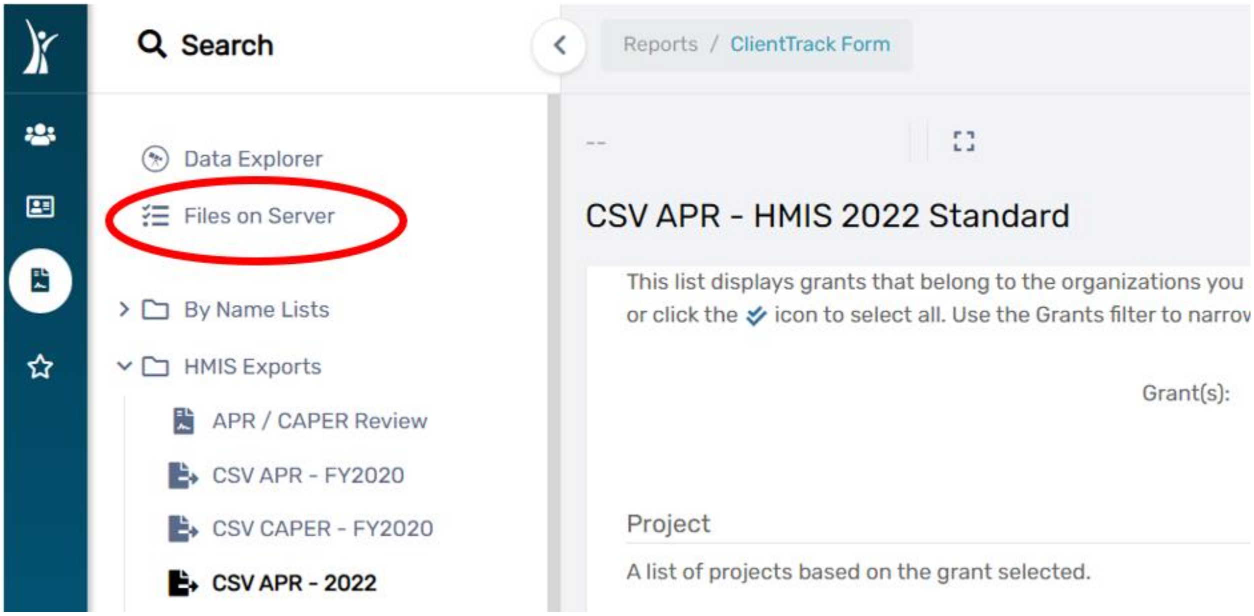
6. An **"Export Encryption"** window will appear where you set the **"Password"** to protect the files. Enter a password and click **"Done"** to continue with the export



7. A pop-up will appear **"Your export has been queued and will be processed at the next available time."** Click **"OK"**



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



9. 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**

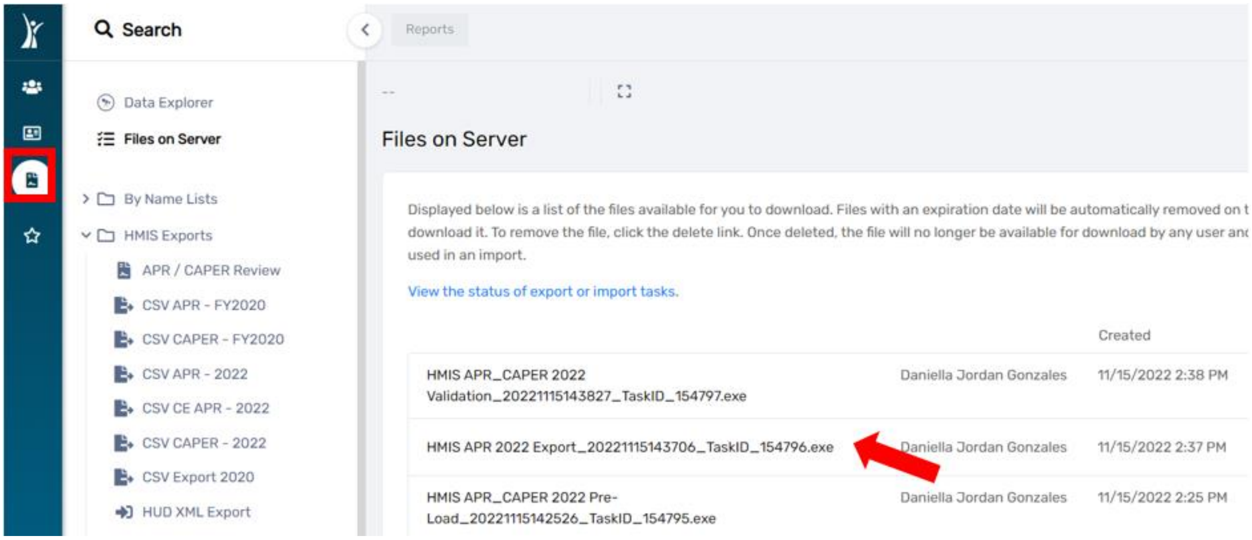
   b. **For APRs:**
   - **HMIS APR CAPER 2022 Validation file**
   - **HMIS APR 2022 Export file**
   - **HMIS APR CAPER 2022 Pre-Load file**

10. Next, click anywhere on **"HMIS APR 2022 Export"** file if running an **APR** as shown in the image below.

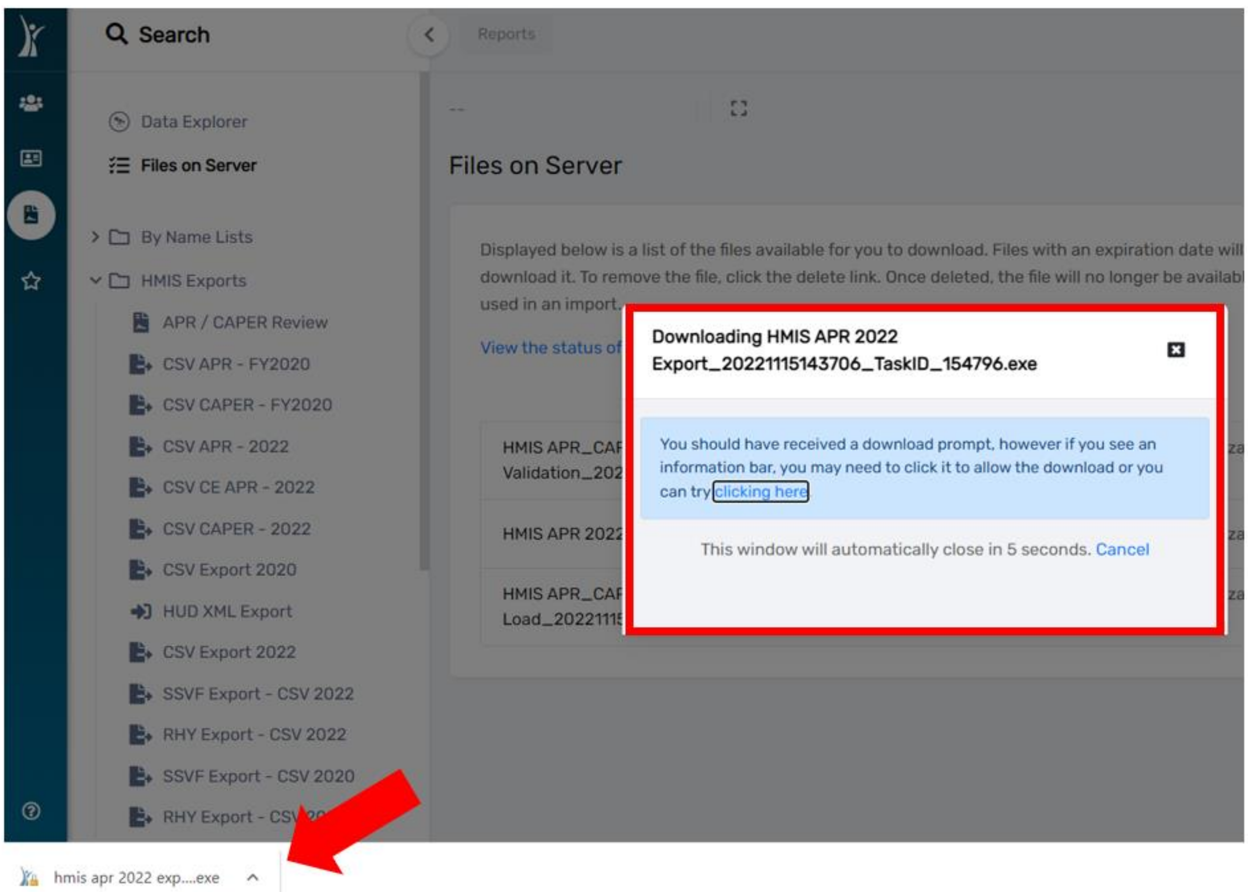
CAPER: You will download, compress, and upload the "HMIS CAPER 2022 Export" file to SAGE.

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

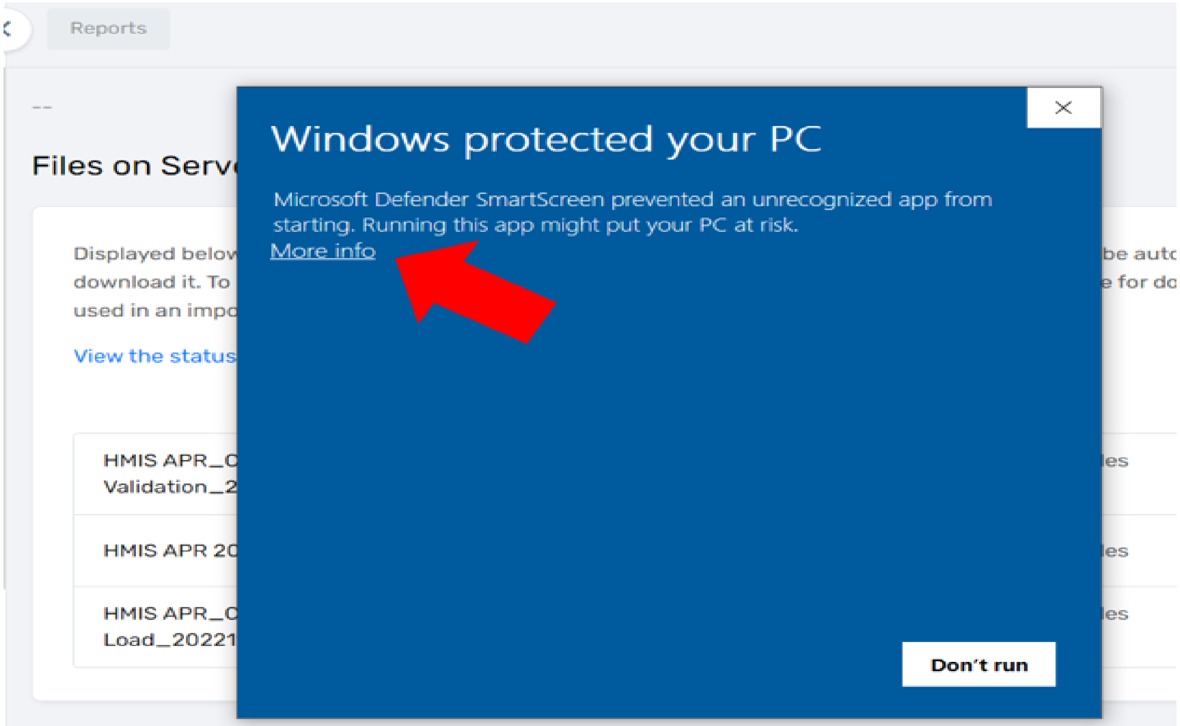
IMPORTANT NOTE: *SAGE WILL NOT ACCEPT THE "VALIDATION OR PRE-LOAD" FILE. YOU MUST DOWNLOAD, ZIP (COMPRESS), THEN UPLOAD THE "EXPORT FILE" IN SAGE.*



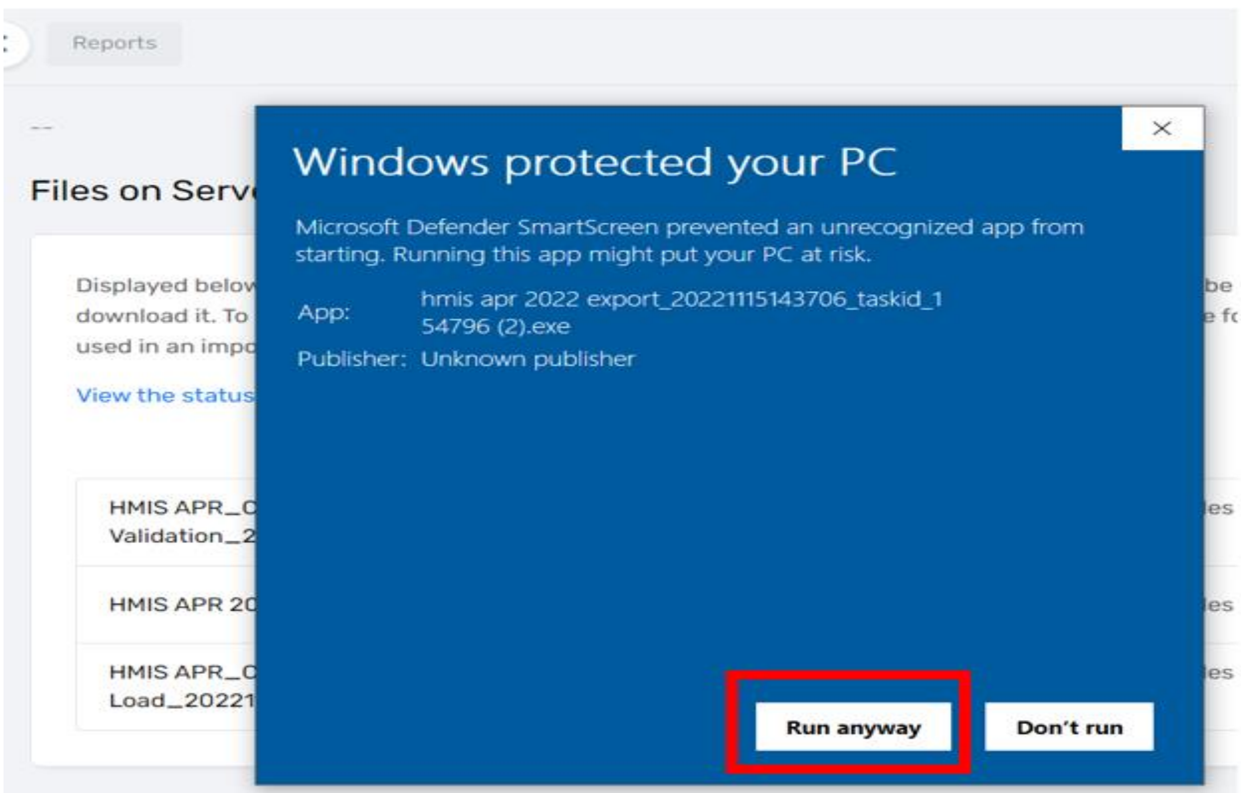
11. After clicking on **"HMIS APR 2022 Export"** file, your screen will display the window shown below. The downloaded file is now visible in the lower left corner of the screen. Right click on the file and select **"Open or Open when done**" as shown below.



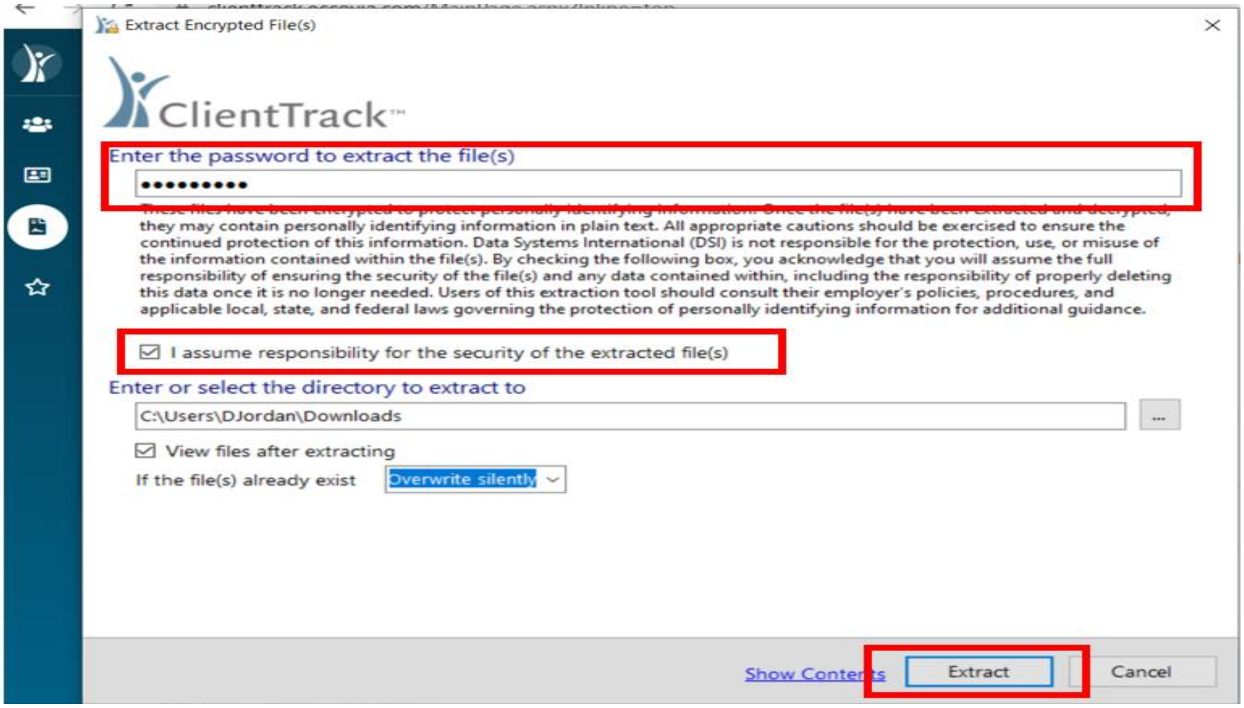
12. You may receive the message below. Please click on **"More info"**



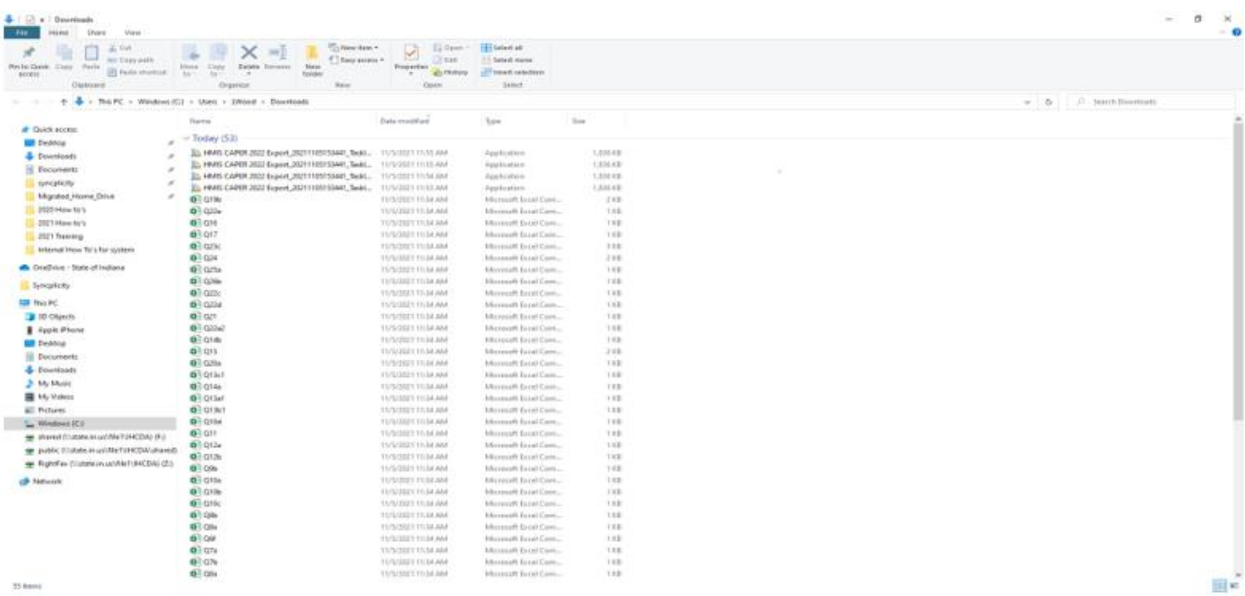
13. Next, click the **"Run anyway"** option as seen below



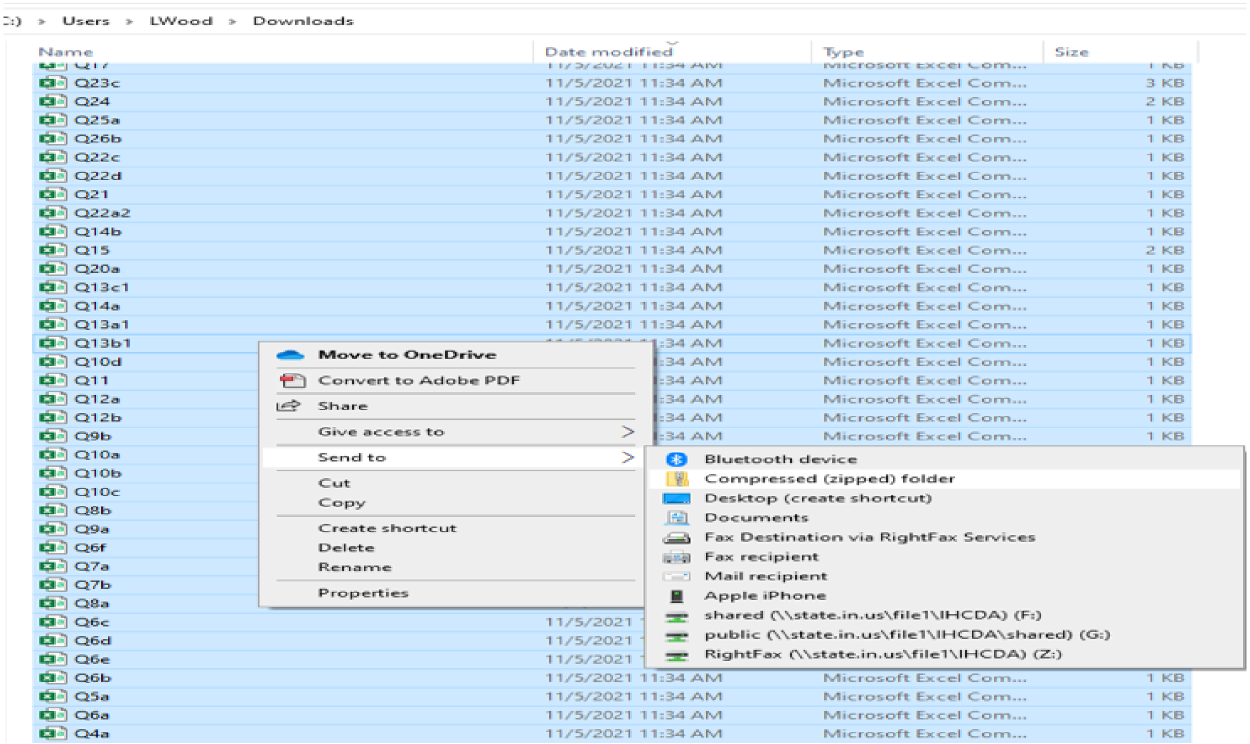
14. Enter the password you created during **Step 4** of this guide, click the check box **"I assume responsibility for the security of the extracted file(s)"**, then select **"Extract"**



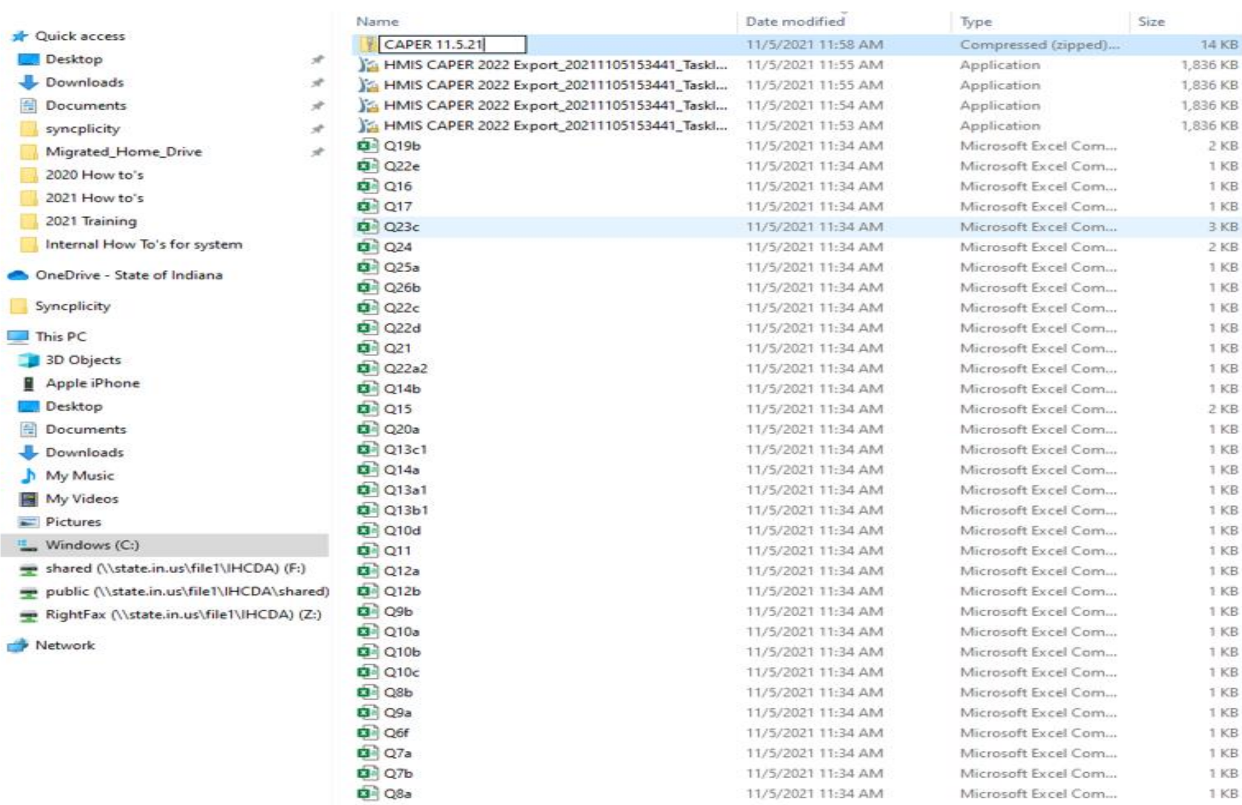
15. The files will download to your computer as seen below.



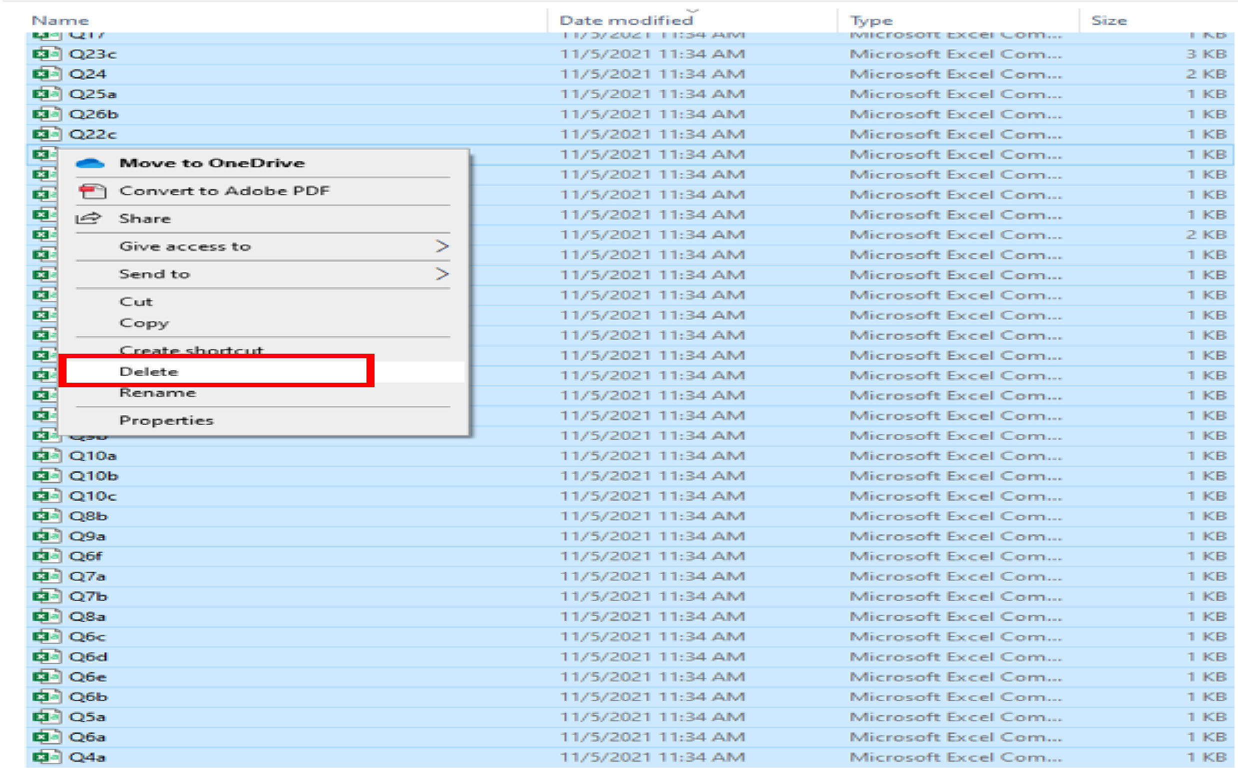
16. Click on the first **"Q"** file and hold down the shift key while using your "arrow down" key to highlight all the **"Q"** labeled report files. Next, right click and select the **"Send to" "Compressed (zipped) folder"**



17. The **"zipped"** folder will appear on your screen. Enter the name of your report for the **"zipped"** folder.

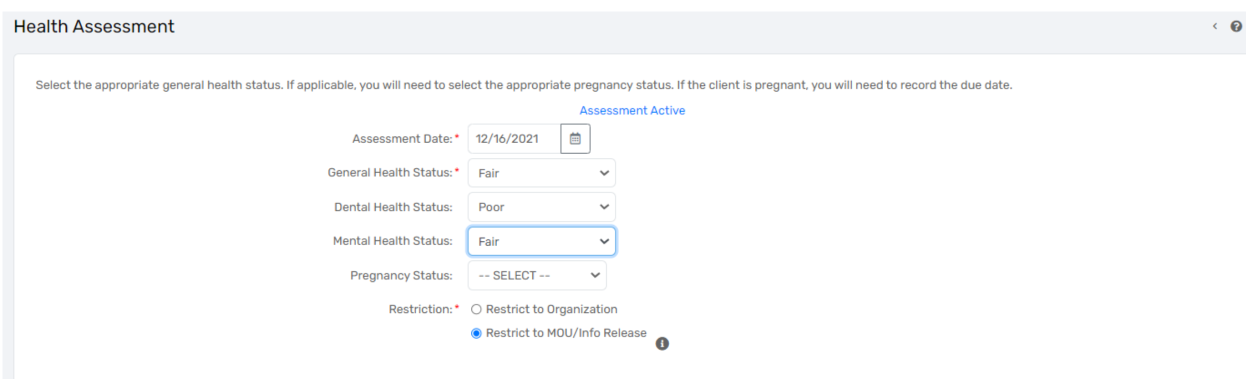


18. Next, delete the individual **"Q"** files still showing in the **"download"** files on your computer. You only need to keep the **"zipped"** folder for upload to SAGE.

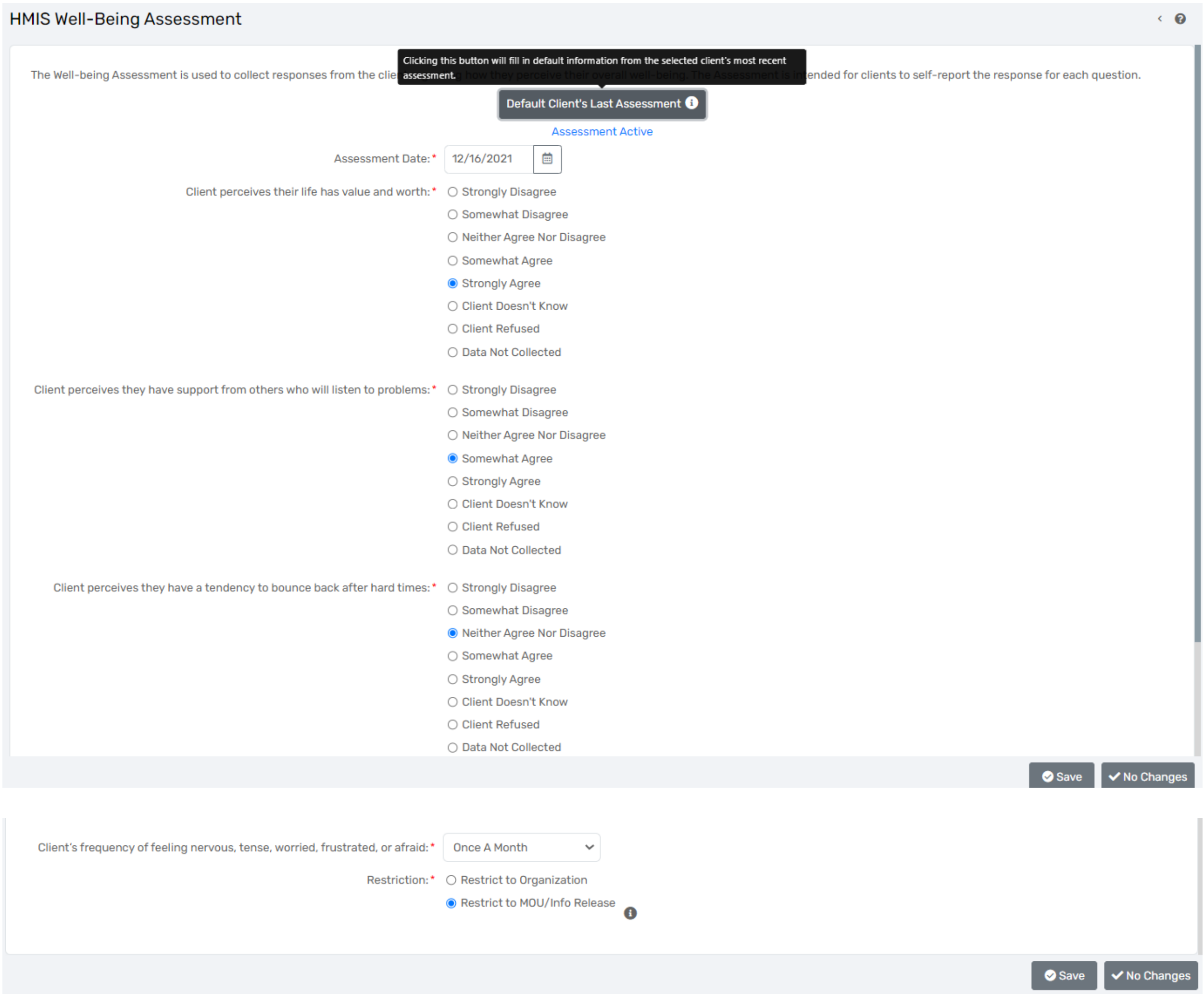


HEALTH ASSESSMENT (PH PROJECTS ONLY)

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



HMIS WELL-BEING ASSESSMENT (PH PROJECTS ONLY)



- 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

The following choices are available for the client on topics 1,2, and 3 on the assessment

  - 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

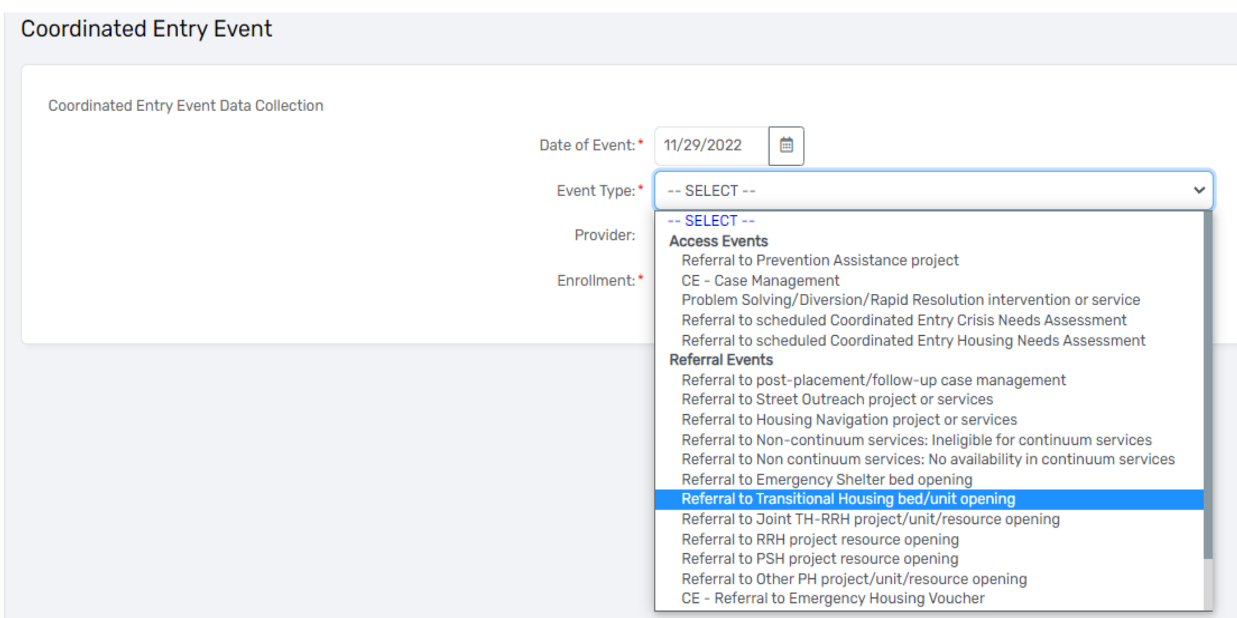
COORDINATED ENTRY

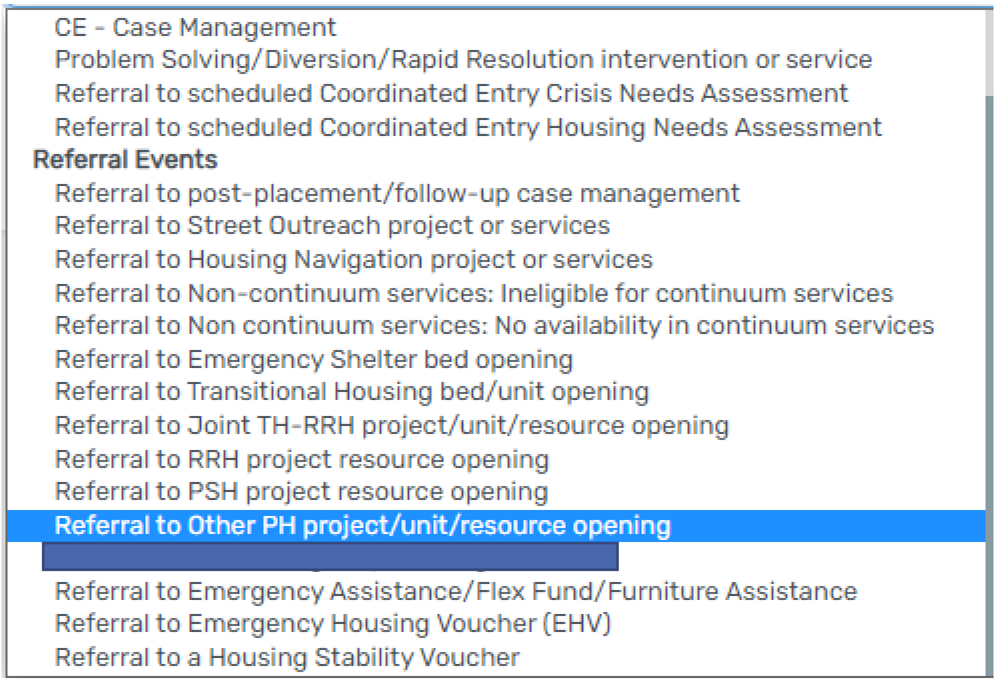
ADDING A COORDINATED ENTRY EVENT

The "***Coordinated Entry Event"*** is designed to capture key referral and placement events, as well as the results of those events. It will help communities understand the events that go into achieving desired (and undesired) results through the Coordinated Entry system. This data element is intended to standardize data collection on core components of Coordinated Entry like access, assessment, referral, and prioritization.

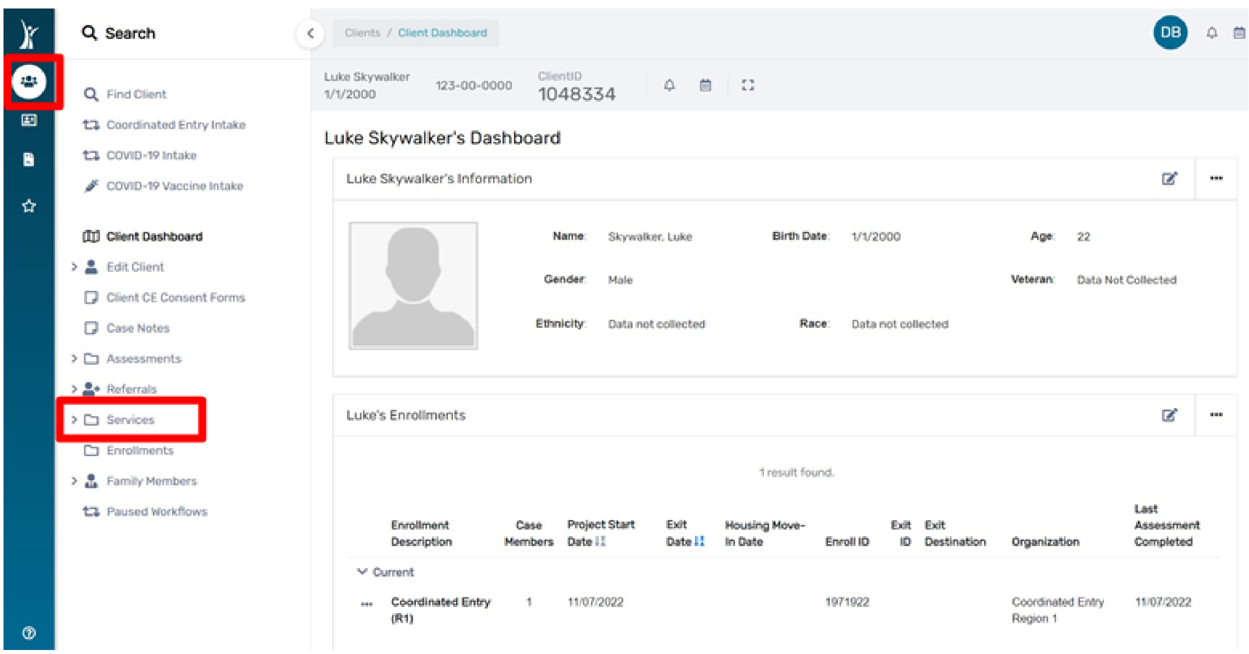
Record the 'Date' and relevant 'Event.' When known, return to the record and record the appropriate result for each 'Event' recorded. Record, in separate Event records, as many 'Events' as is necessary for each client for the duration of their enrollment in the Coordinated Entry project. *Coordinated Entry Events* may be recorded at the same time as a *Coordinated Entry Assessment,* or they may be independent of any *Coordinated Entry Assessment* that has occurred.

The screenshots and instructions below are specific to recording a Coordinated Entry Event for an EHV (Emergency Housing Voucher) referral. Please note: The instructions are the same for adding other types of CE Events as listed in the "Event Type" drop-down list on the "Add CE Event" screen:

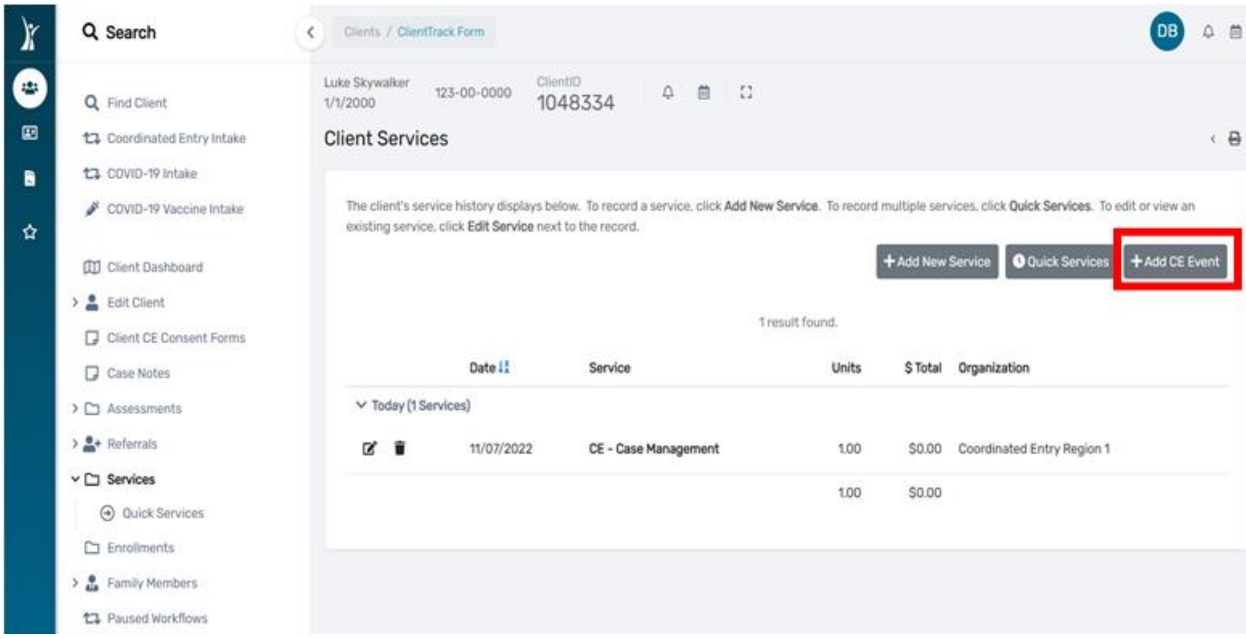




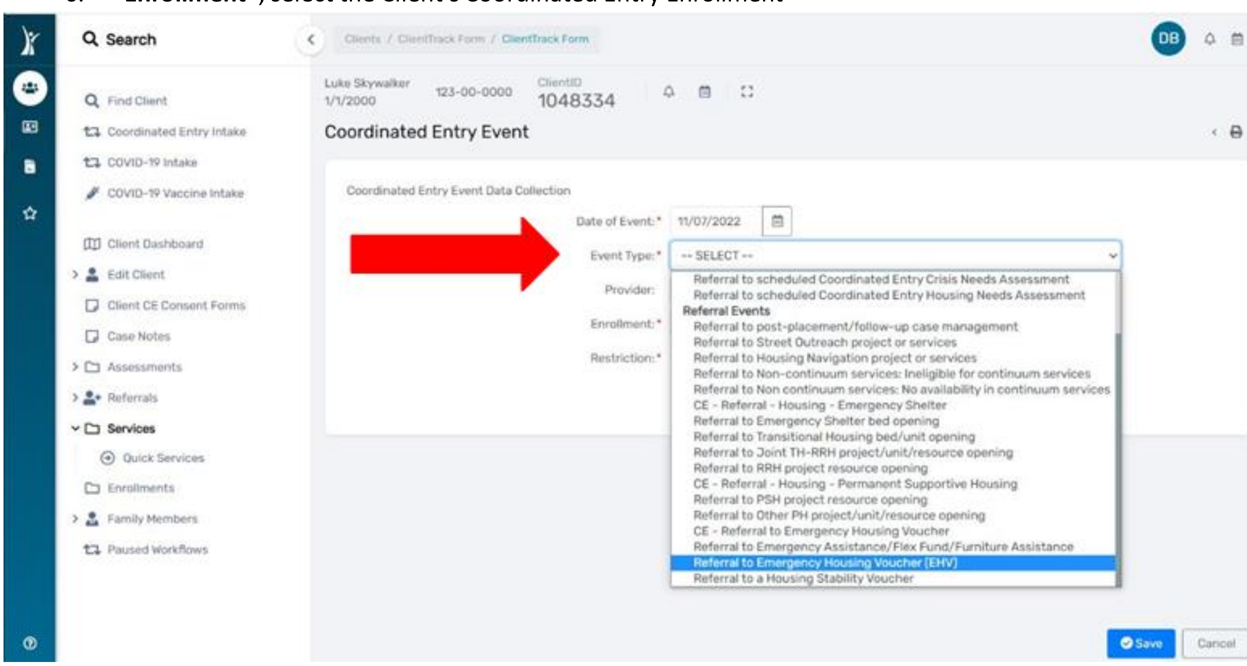
1. Make sure that you are logged in under the CE Workgroup by clicking on your initials in the upper right-hand corner. Select **"2020 Coordinated Entry"** for the Workgroup and your **"Coordinated Entry Region #"** for the Organization.
2. Next, select the **"Clients"** icon in the upper left corner, then select the **"Services"** tab located in the menu on the left side of the page.

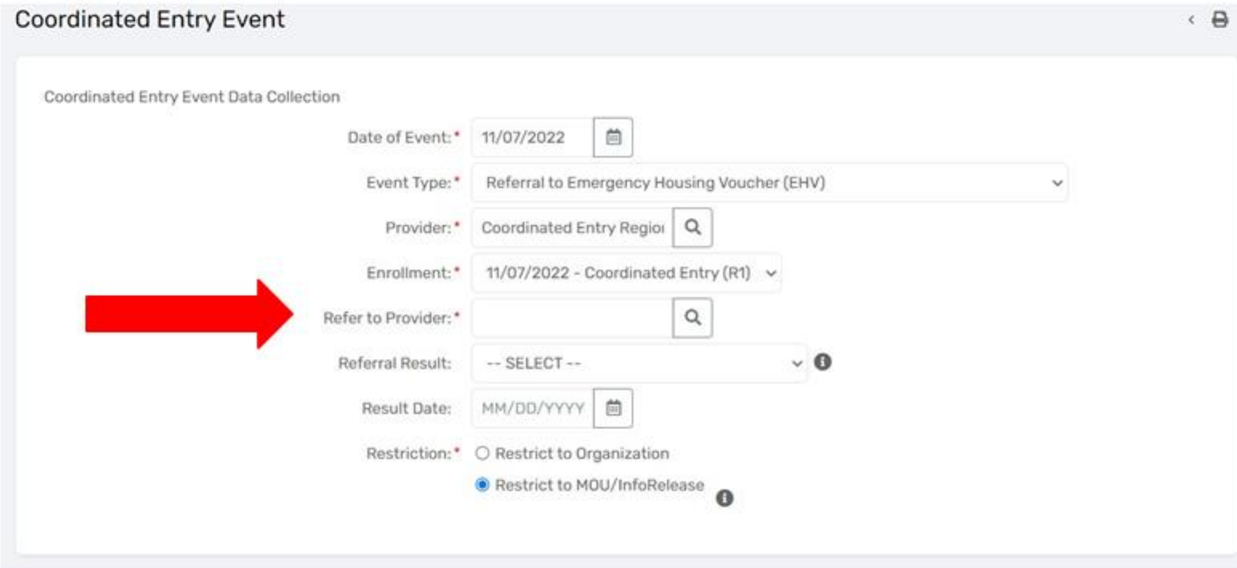


3. Select **"ADD CE Event"**

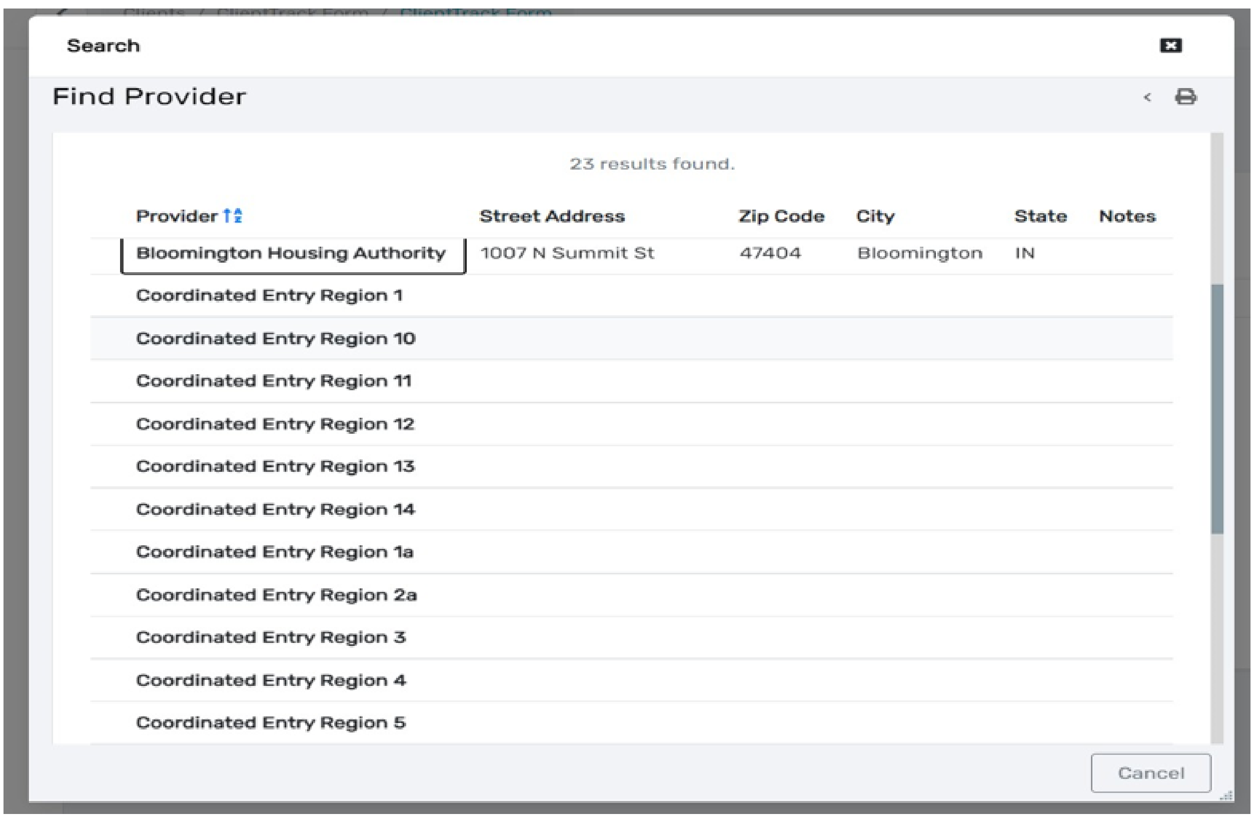


4. In the **"Event Type"** field, select **"Referral to Emergency Housing Voucher (EHV)"** from the drop-down list
5. **"Provider"** is your Coordinated Entry Region #
6. **"Enrollment"**, select the Client's Coordinated Entry Enrollment

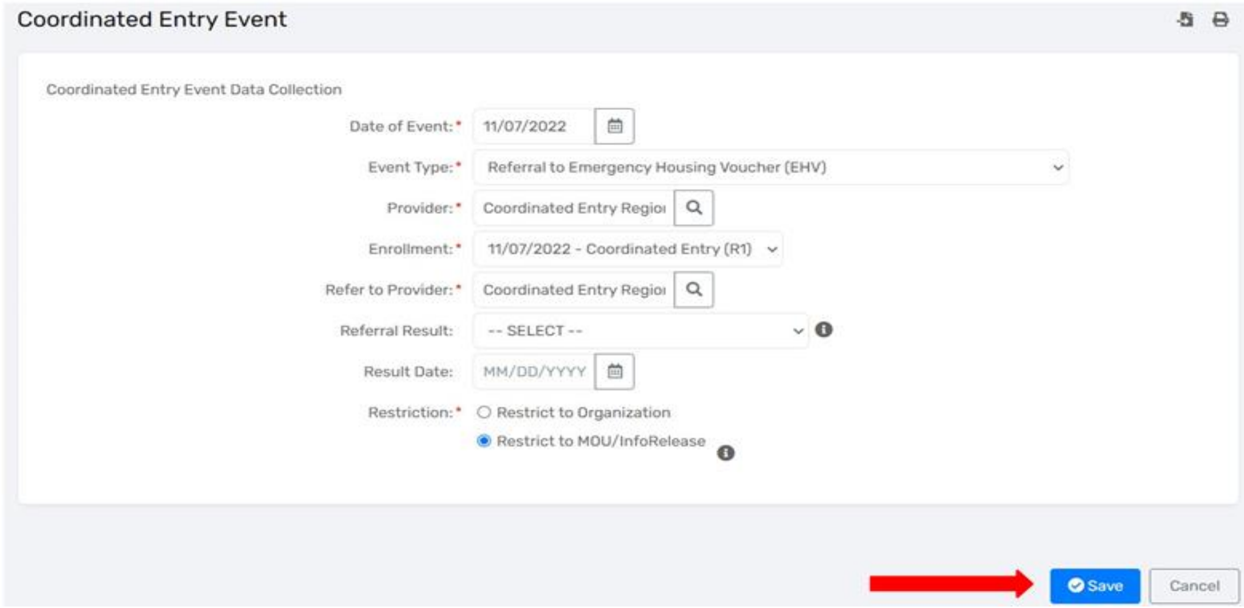




7. **"Refer to Provider"** field, click on the magnifying glass which takes you to a list of available Public Housing Authorities who are accepting referrals for the Emergency Housing Voucher. Next, select (click on) the name of the PHA you are referring your client to for assistance.

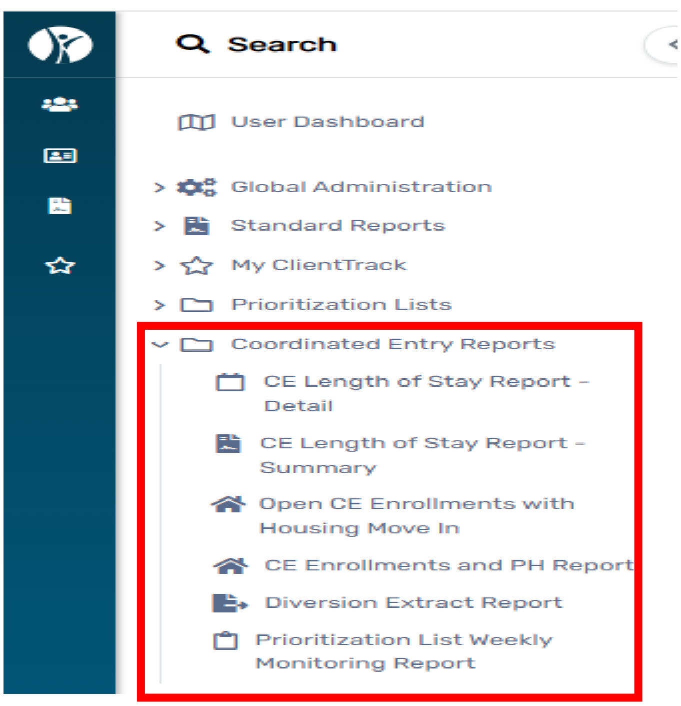


8. Select **“Save”** in the bottom right corner of the screen.



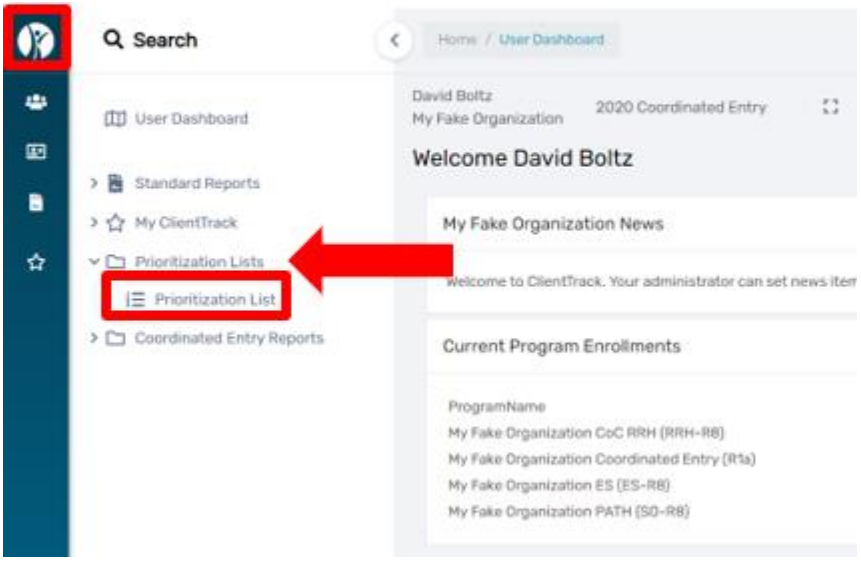
COORDINATED ENTRY REPORTS

1. Log in to HMIS using the **“2020 Coordinated Entry”** workgroup and your **“Coordinated Entry Region #”** as the organization.
2. On the “HOME” workspace select “Coordinated Entry Reports”

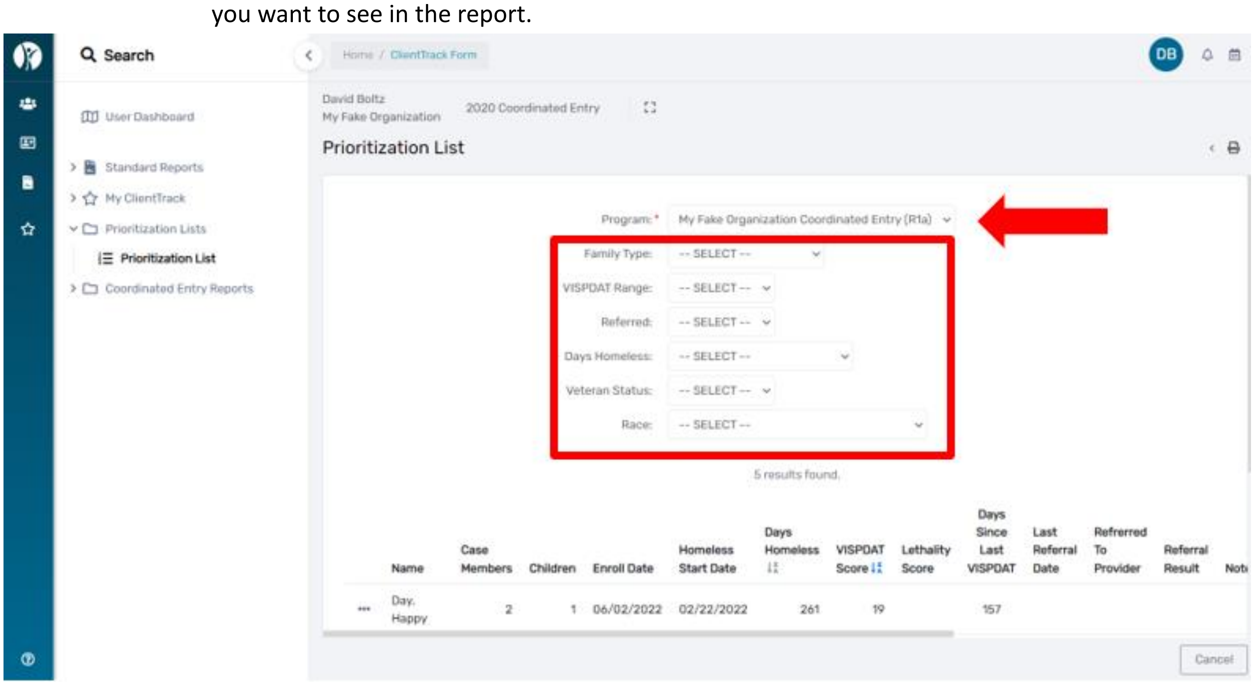


Prioritization List

1. From the **“Home”** workspace, locate the **“Prioritization List”** function in the menu on the left- hand side of the screen.
2. Click on **“Prioritization Lists”**. The menu will expand below, click on **“Prioritization List”** to open the report.

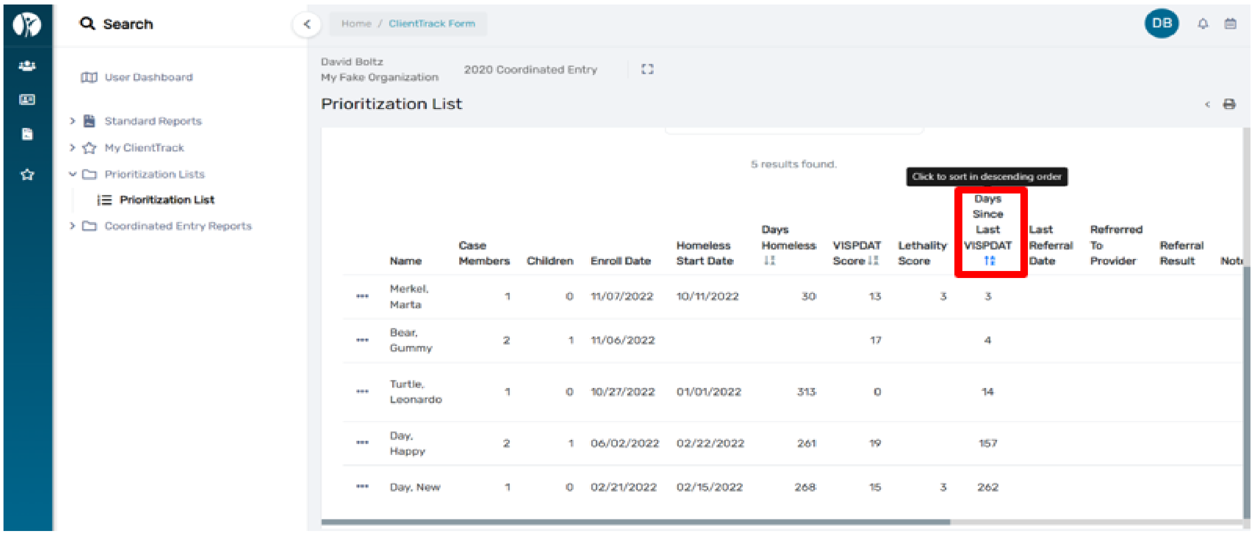


3. Choose your **“Coordinated Entry Region #”** from the **“Program”** drop down menu.
   a. You can also sort by ***Family Type, VISPDAT Range, Referred, Days Homeless and/or Veteran Status*** by clicking on the corresponding drop-down menu then clicking on the sort choice you want to see in the report.

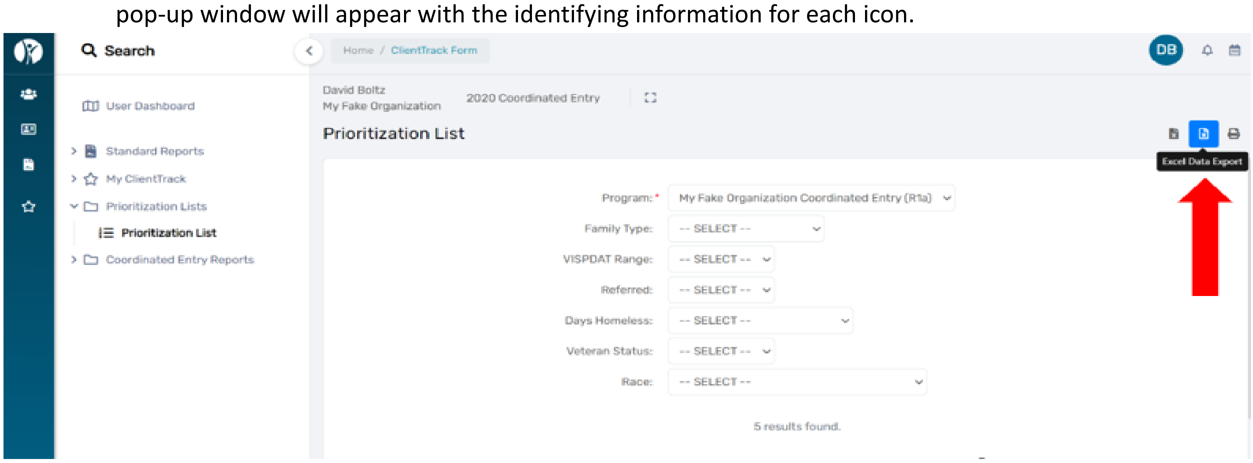


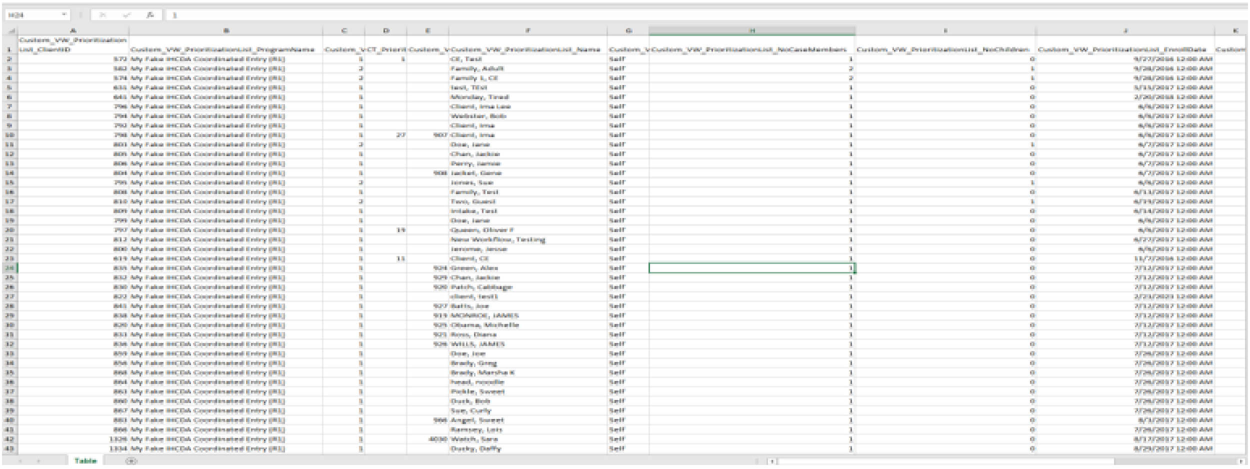
4. Columns with a displayed in the heading can be sorted by clicking on the .
5. In the screenshot below, we will sort the **“Days Since Last VISPDAT”** column by clicking on the

text. This will sort in ascending order, click one more time for descending order.



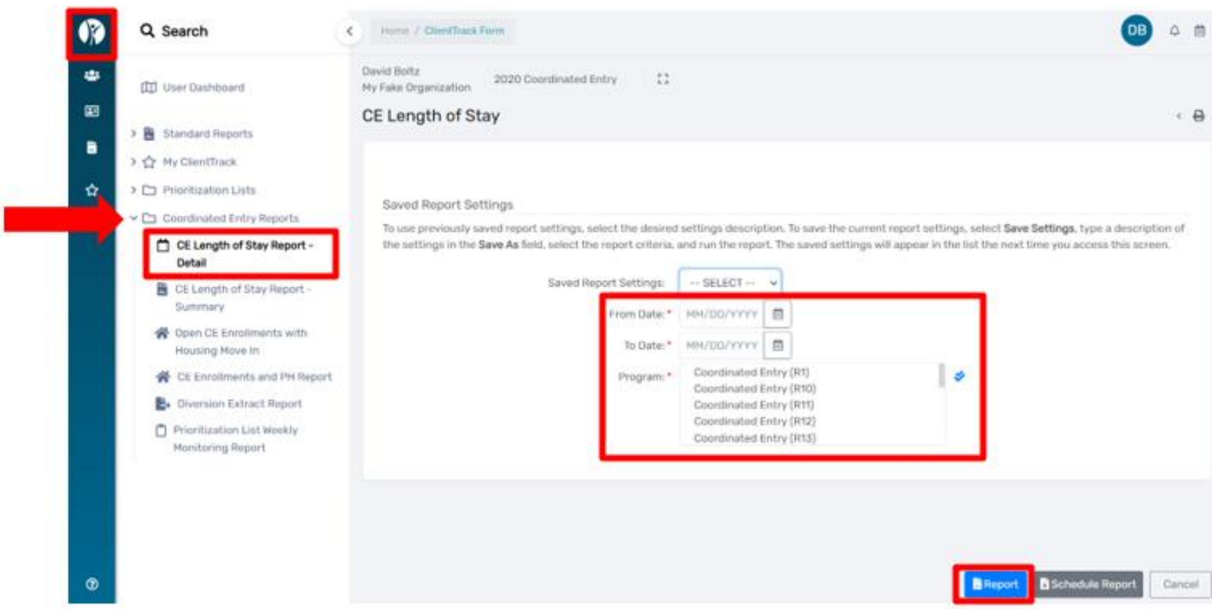
6. In descending order, the list will sort and display the highest number of **"Days Since Last VISPDAT"** starting at the top. This sorting tool is helpful when monitoring your Prioritization List for Clients which require a new VI-SPDAT. **(All Coordinated Entry Clients are required to complete a new VI-SPDAT every 90 days to ensure we have their current information.)**
7. Export the **"Prioritization List'** by clicking on the **"Excel Data Export"** icon located at the top right corner of the page. The icons can be identified by hovering your cursor over each choice. A small pop-up window will appear with the identifying information for each icon.



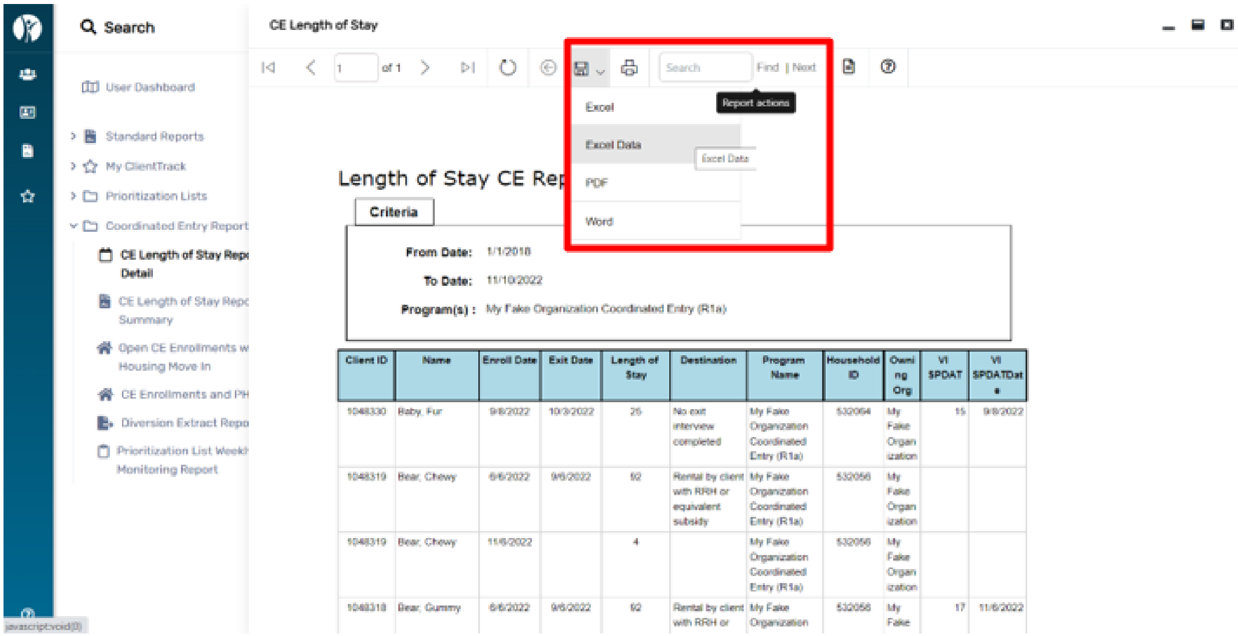


CE Length of Stay (Detail and Summary) Report

1. From the **"HOME"** workspace, locate the **"Coordinated Entry Reports"** function in the menu on the left side of the screen.
2. Click on **"Coordinated Entry Reports"**. The menu will expand below, click on **"CE Length of Stay Report-Detail"** to open the report.
3. Type in the **"From Date"** and **"To Date",** select the **"Program",** then click **"Report"** located in the bottom right corner.

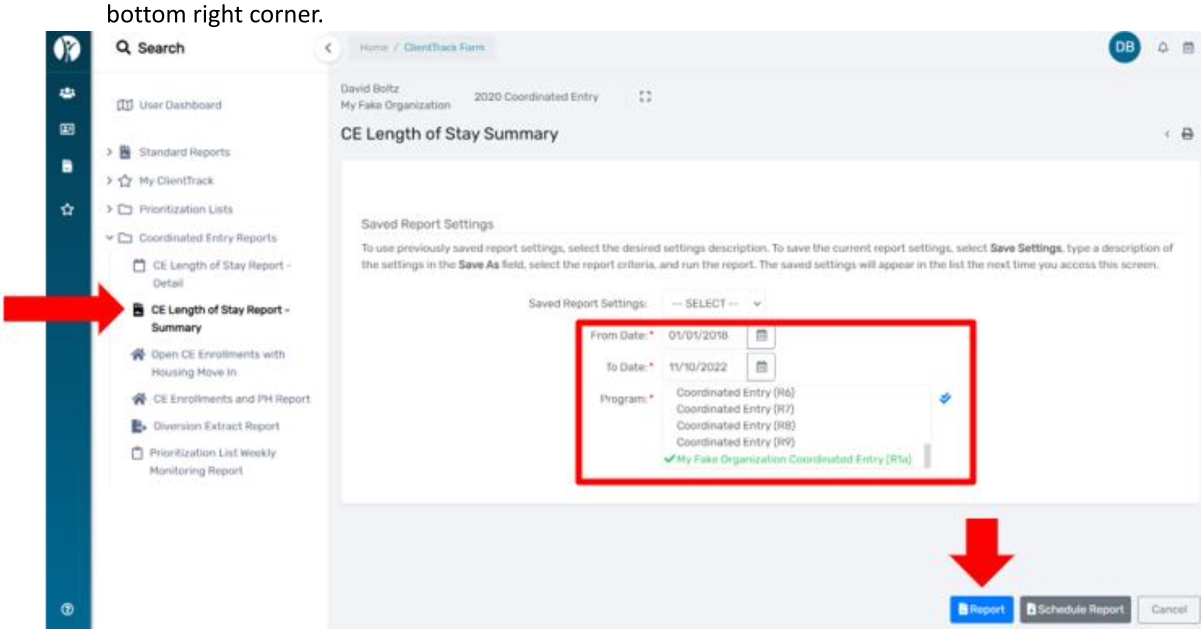


4. The report will appear as seen below. You can export the report into Excel Data, PDF, or Word by clicking on the small disc icon located at the top of the report.

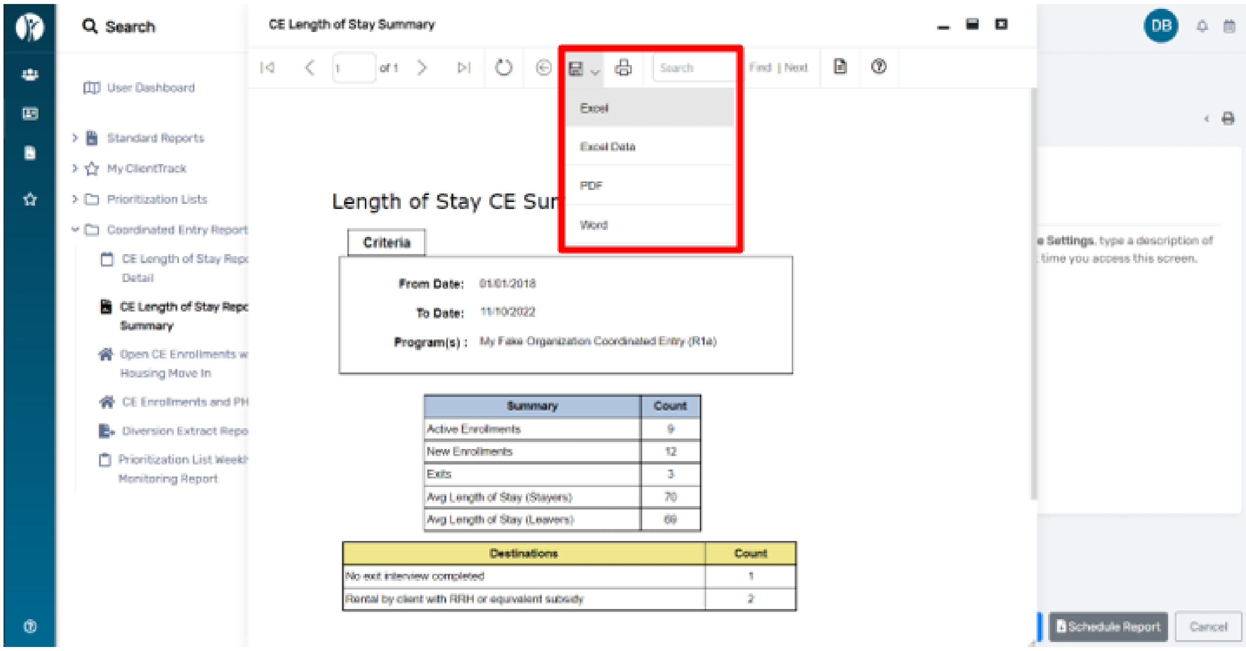


CE Length of Stay Report Summary Report

1. From the **"Home"** workspace, locate the **"Coordinated Entry Reports"** function in the menu on the left-hand side of the screen.
2. Click on **"Coordinated Entry Reports"**. The menu will expand below, click on **"CE Length of Stay Report Summary"** to open the report.
3. Type in the **"From Date"** and **"To Date",** select the **"Program",** then click **"Report"** located in the bottom right corner.

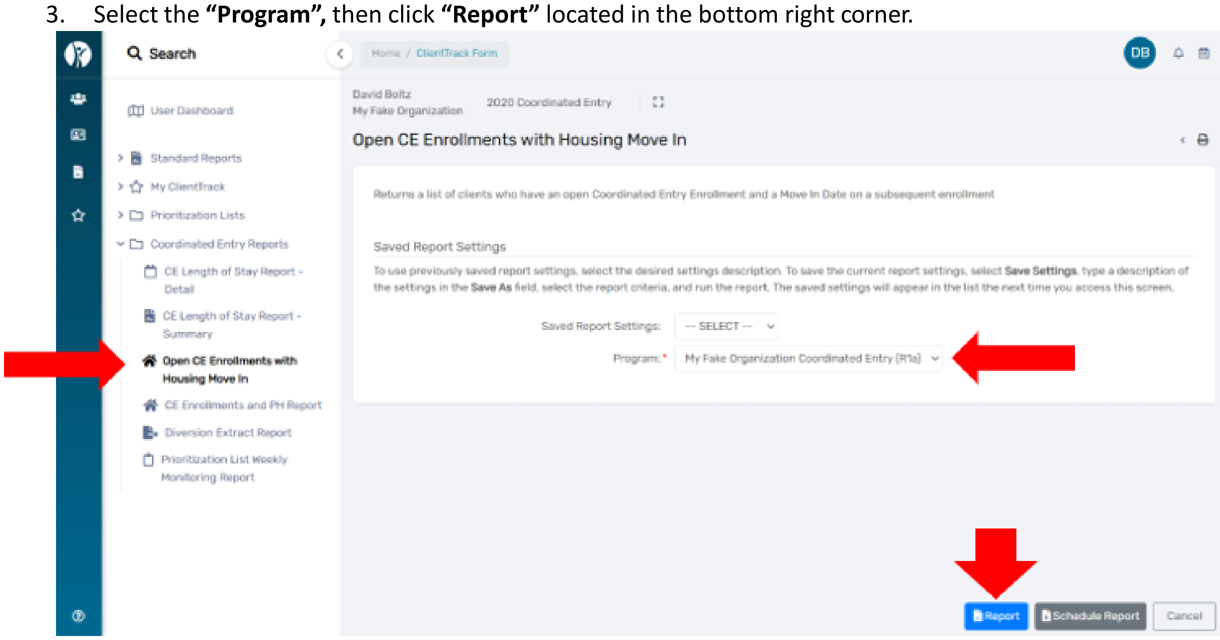


4. The report will appear as seen below. You can export the report into Excel Data, PDF, or Word by clicking on the small disc icon located at the top of the report.

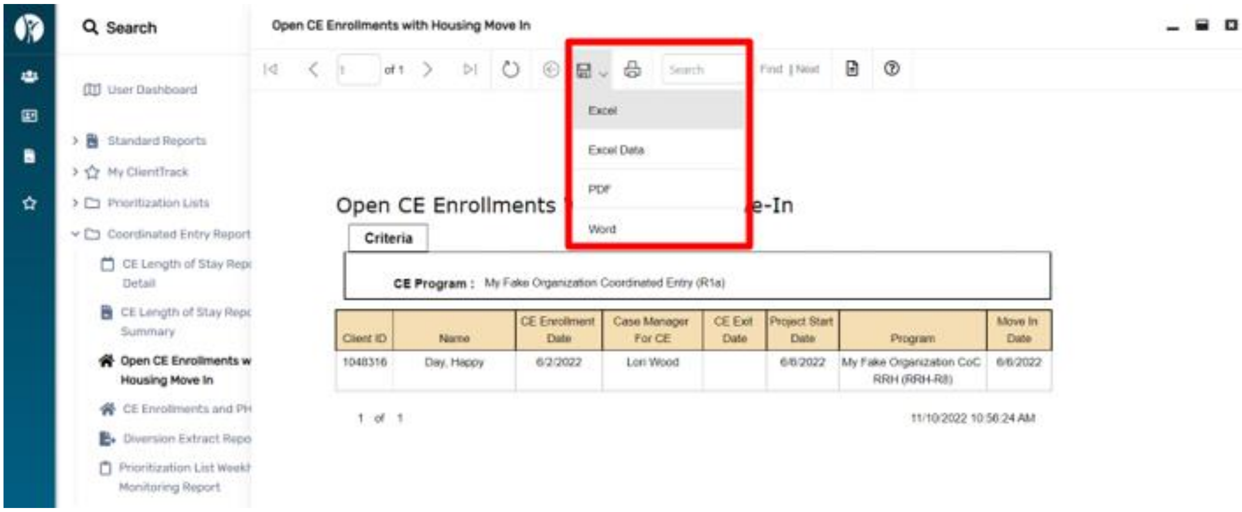


Open CE Enrollments with Housing Move-In Report

1. From the **"Home"** workspace, click on the **"Coordinated Entry Reports"** tab in the menu on the left-hand side of the screen.
2. The menu will expand below, click on **"Open CE Enrollments with Housing Move In"** to open the report.
3. Select the **"Program",** then click **"Report"** located in the bottom right corner.



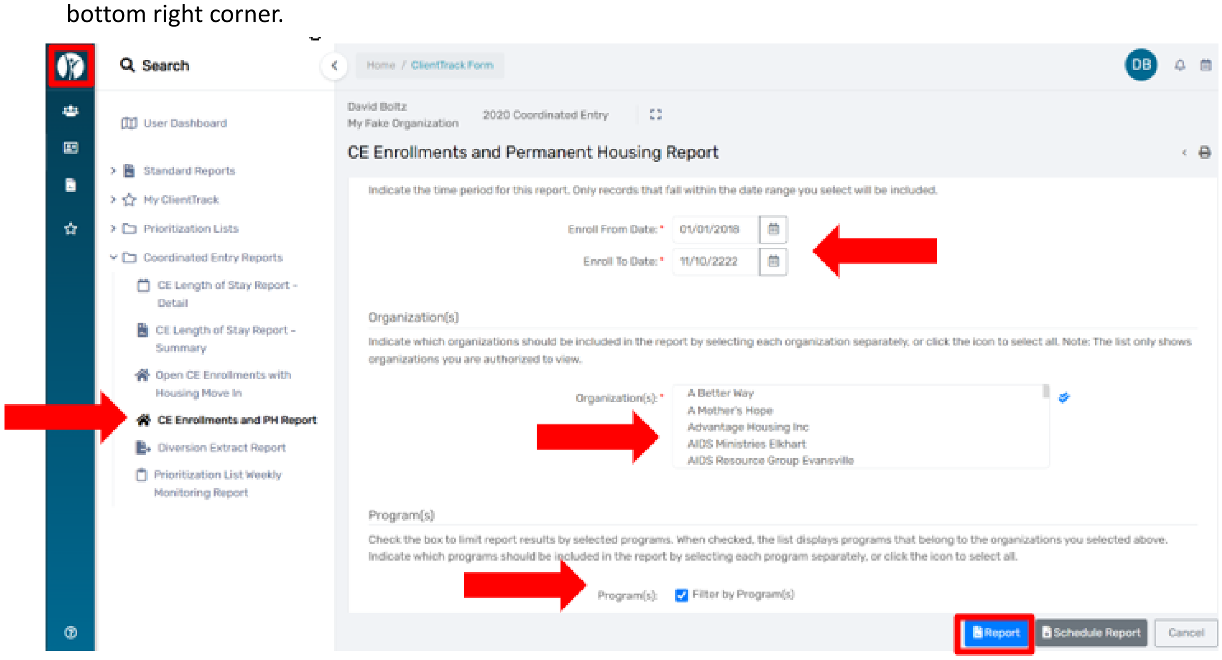
4. The report will appear as seen below. You can export the report into Excel Data, PDF, or Word by clicking on the small disc icon located at the top of the report.

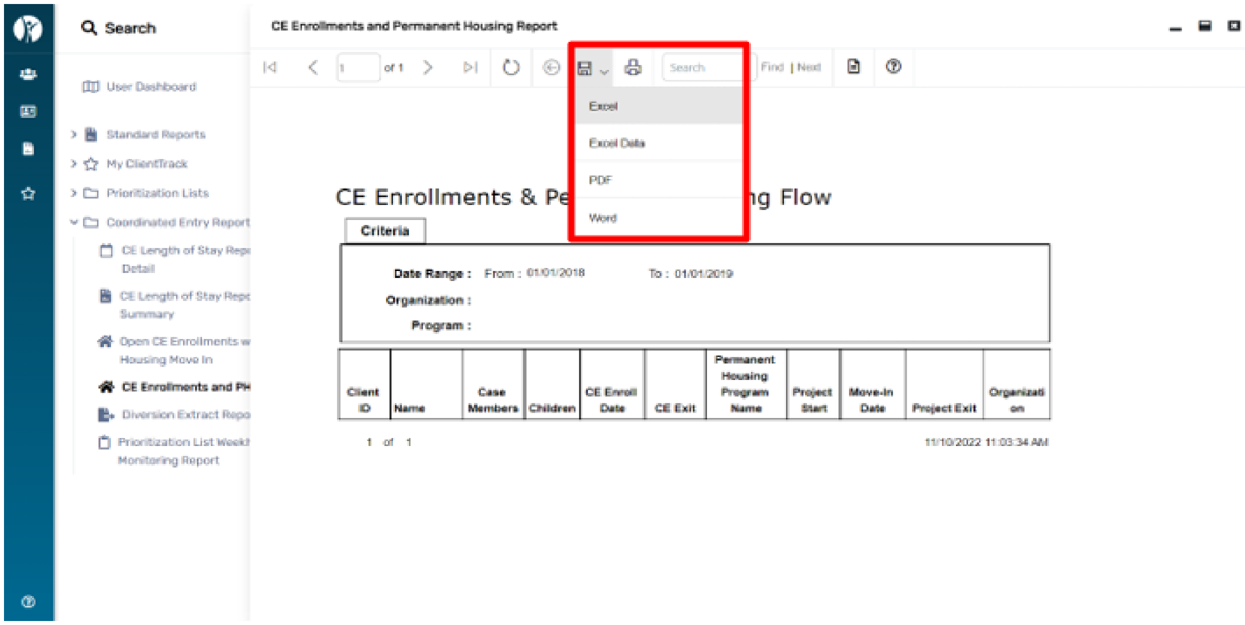


5. The clients listed on this report have a **"Housing Move-In Date"** but have ***NOT*** been exited from **"Coordinated Entry"**. Please find the Client's CE HMIS record and exit the Client from their open "**Coordinated Entry"** enrollment as of their **"Housing Move-In Date"**.

CE Enrollments and PH Report

1. From the **"Home"** workspace, locate the **"Coordinated Entry Reports"** function in the menu on the left-hand side of the screen.
2. Click on **"Coordinated Entry Reports"**. The menu will expand below, click on **"CE Enrollments and PH Report"** to open the report.
3. Enter the **"Enroll From Date"** and **"Enroll To Date"**, choose the **"Organization"** from the list or Organizations displayed, choose the **"Program(s)"** you wish to view, then click **"Report"** located in the bottom right corner.

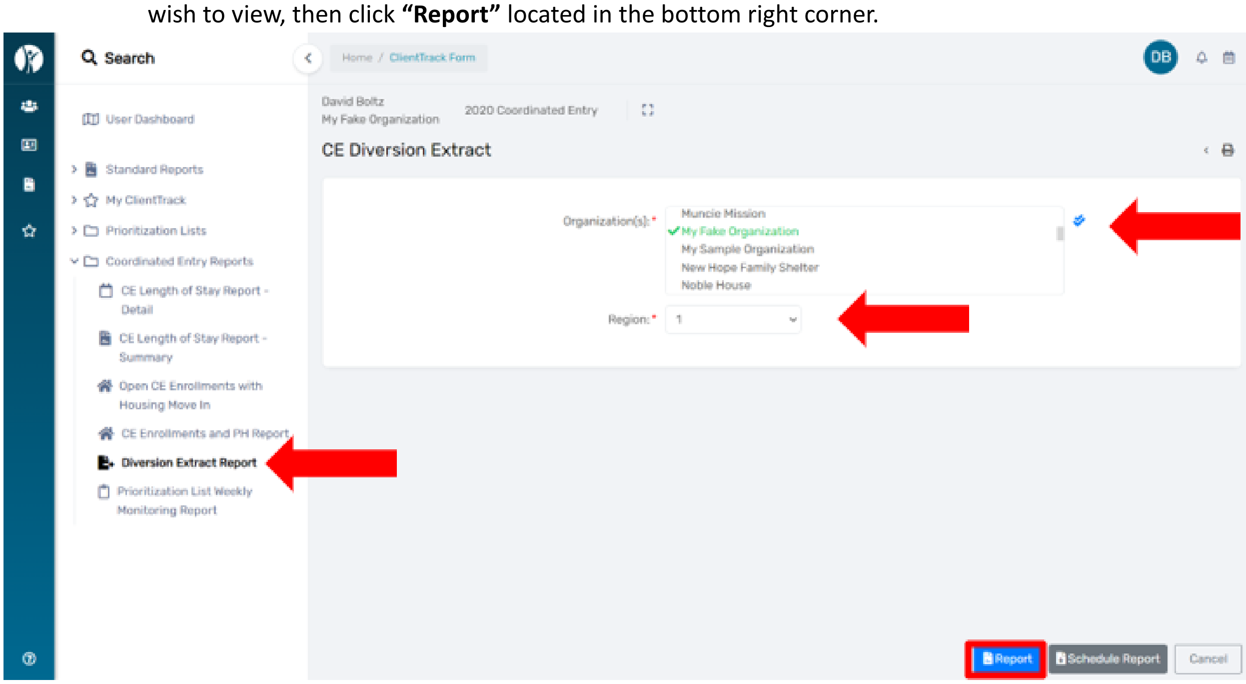




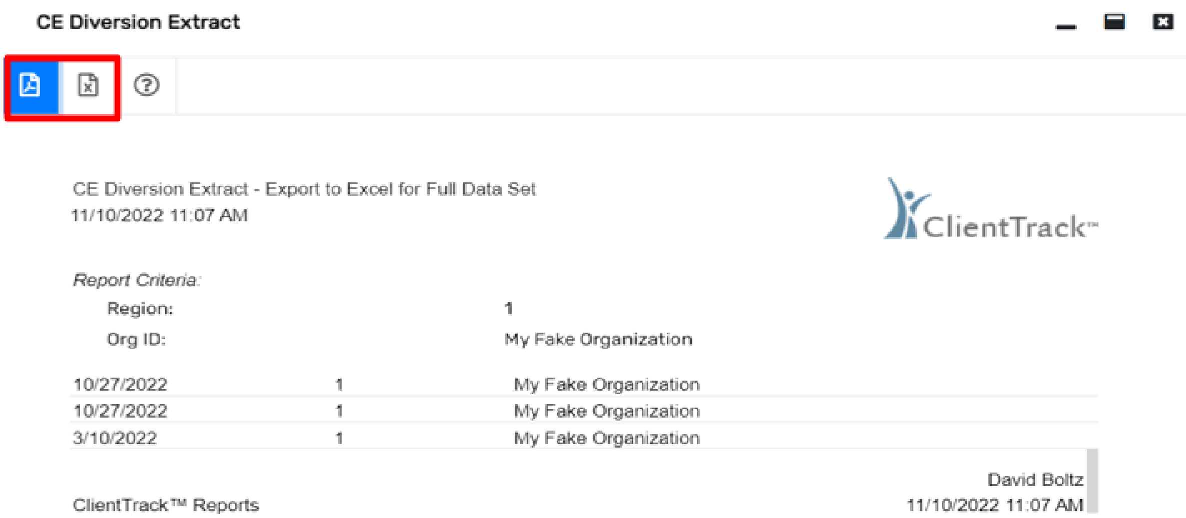
4. The report will display as shown above. This is a helpful tool to track the length of time between enrollment in Coordinated Entry and the Housing Move-In Date. Again, the report can be exported to Excel Data, PDF, or Word by clicking on the floppy disc icon.

Diversion Extract Report

1. From the **"Home"** workspace, locate the **"Coordinated Entry Reports"** function in the menu on the left-hand side of the screen.
2. Click on **"Coordinated Entry Reports"**. The menu will expand below, click on **"Diversion Extract Report"** to open the report.
3. Choose the **"Organization(s)"** from the list or Organizations displayed, choose the **"Region"** you wish to view, then click **"Report"** located in the bottom right corner.



4. The report will display as shown above. This tool is helpful in reviewing the success of Diversion. The report can be exported to Excel Data or PDF.



CE Diversion Extract

CE Diversion Extract - Export to Excel for Full Data Set
11/10/2022 11:07 AM

Report Criteria:

Region:	1
Org ID:	My Fake Organization

10/27/2022	1	My Fake Organization
10/27/2022	1	My Fake Organization
3/10/2022	1	My Fake Organization

ClientTrack™ Reports — David Boltz, 11/10/2022 11:07 AM

5. Once exported to Excel, a zero (0) indicates **"No"** and a one (1) indicates **"Yes"**.

Prioritization List Weekly Monitoring Report

1. From the **"Home"** workspace, locate the **"Coordinated Entry Reports"** function in the menu on the left-hand side of the screen.
2. Click on **"Coordinated Entry Reports"**. The menu will expand below, click on **"Prioritization List Weekly Monitoring Report"** to open the report.
3. ***All regions are included in this report***. This tool is helpful in monitoring your region's CE enrollments for Clients with VI-SPDAT assessments older than 90 days.

CE Prioritization List Weekly Monitoring

Thursday, December 26, 2019

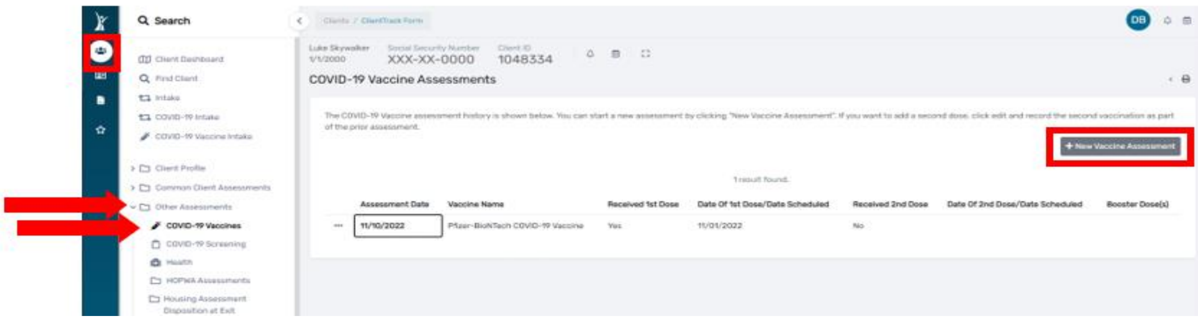
DATE	REGION	# TOTAL HOUSEHOLDS	ASSESSMENT > 90 DAYS	ASSESSMENT < 90 DAYS	VISPDAT SCORE 0 - 3	VISPDAT SCORE 4-18 or Unknown	# HOUSEHOLDS VISPDAT SCORE MISSING
12/26/2019	1	117	97	1	15	102	19
12/26/2019	1A	0	0	0	0	0	0
12/26/2019	2	0	0	0	0	0	0
12/26/2019	2A	0	0	0	0	0	0
12/26/2019	3	0	0	0	0	0	0
12/26/2019	4	0	0	0	0	0	0
12/26/2019	5	0	0	0	0	0	0
12/26/2019	6	0	0	0	0	0	0
12/26/2019	7	0	0	0	0	0	0
12/26/2019	8	0	0	0	0	0	0
12/26/2019	9	0	0	0	0	0	0
12/26/2019	10	0	0	0	0	0	0
12/26/2019	11	0	0	0	0	0	0
12/26/2019	12	0	0	0	0	0	0
12/26/2019	13	0	0	0	0	0	0
12/26/2019	14	0	0	0	0	0	0
	TOTAL	117	97	1	15	102	
	%	100%	83%	1%	13%	87%	

12/26/2019 9:42:47 AM

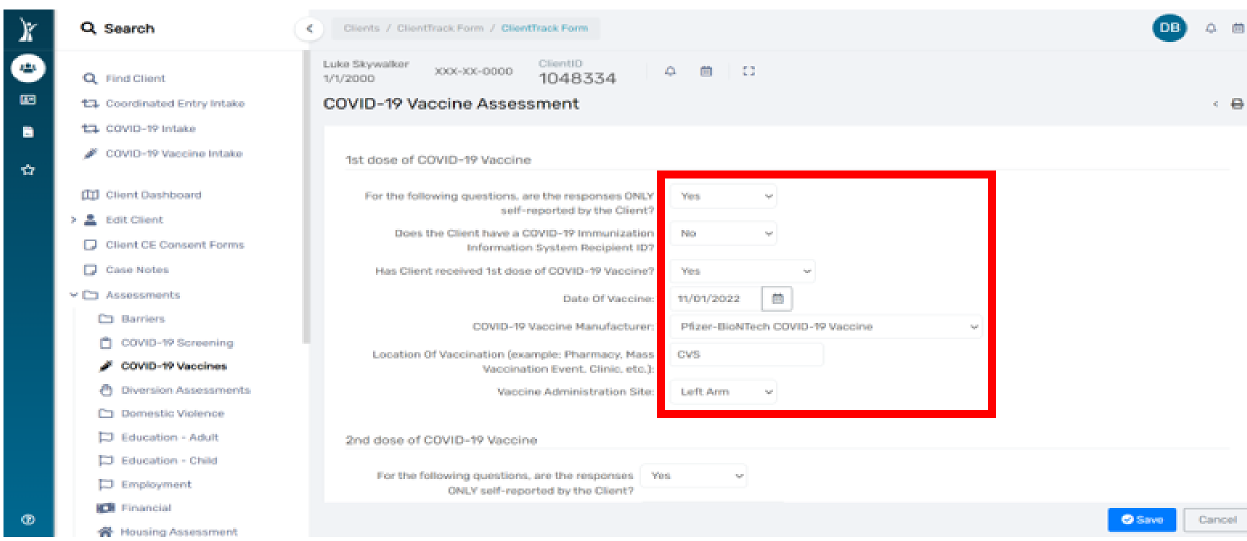
COVID-19 VACCINE ASSESSMENT

ClientTrack has created an assessment for communities to collect data related to COVID-19 vaccinations. Communities should enter data related to client vaccination status, dates of vaccinations, manufacturer of vaccine, and information on why some clients may opt out of receiving the vaccine.

1. To add a vaccine assessment to a client record, go to an existing client record under the **“Other Assessments”** menu and click on **“COVID-19 Vaccines”**. Then select **“New Vaccine Assessment”** in the upper right-hand corner to create a new record.



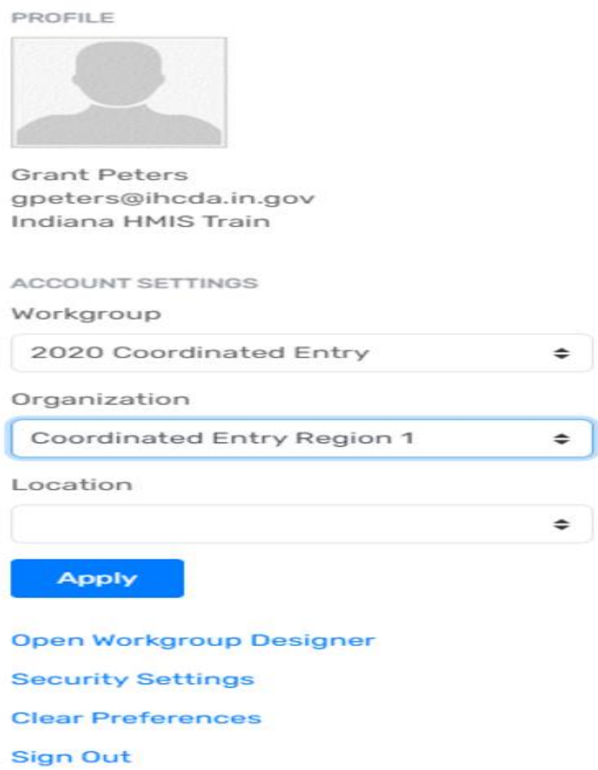
2. Follow the provided prompts to enter the requested information (date of immunization, manufacture, administration site, etc.). Menus will drop down to enter information for the 2nd dose as well as booster shots if those options are selected.



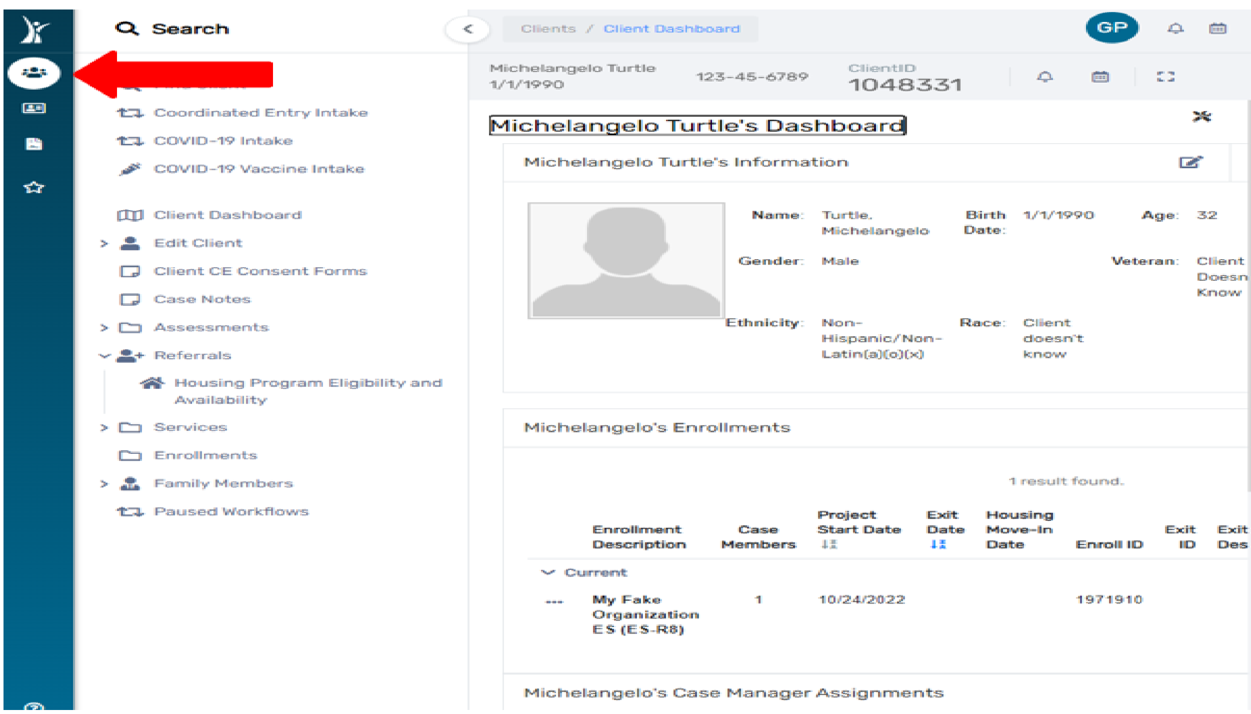
3. Once all information is entered, click **“Save”** to complete the Vaccine Assessment.

COORDINATED ENTRY INTAKE

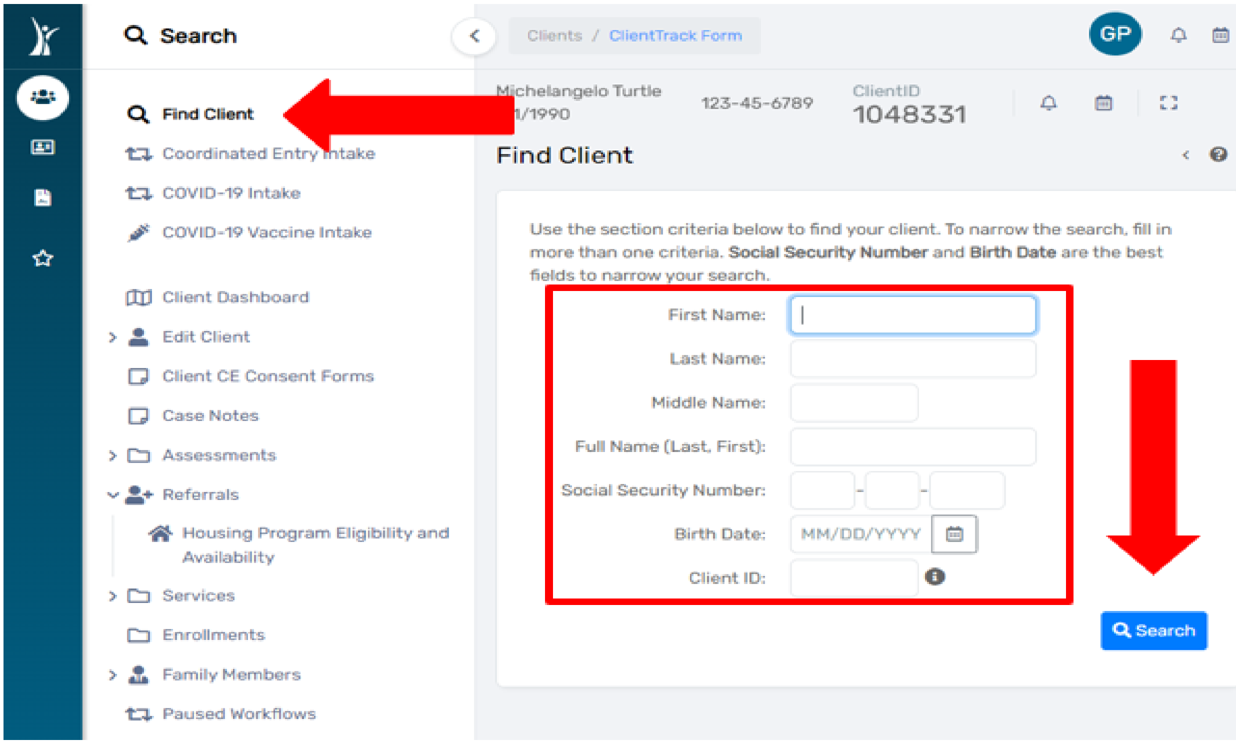
1. Log in to HMIS using the **“2020 Coordinated Entry”** *workgroup* and your **“Coordinated Entry Region #”** as the *organization*.
2. From the **“Home”** workspace, click on your **initials** on the far top right of *ClientTrack* at the top of the page.



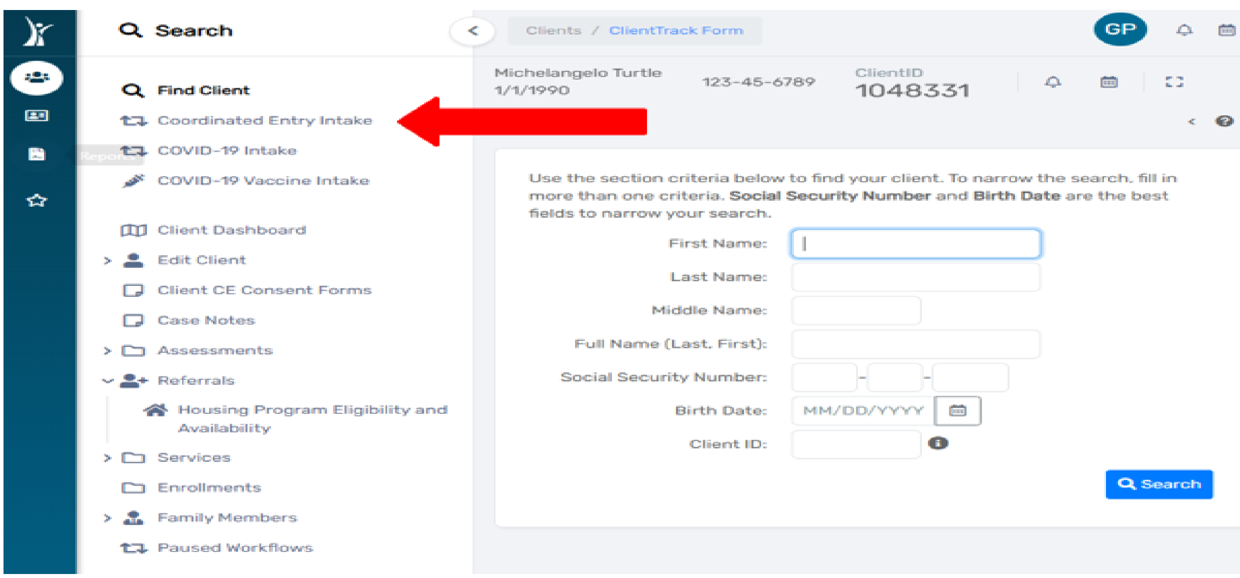
3. From the left hand **"Workspace"** menu, click on **"Clients"**.



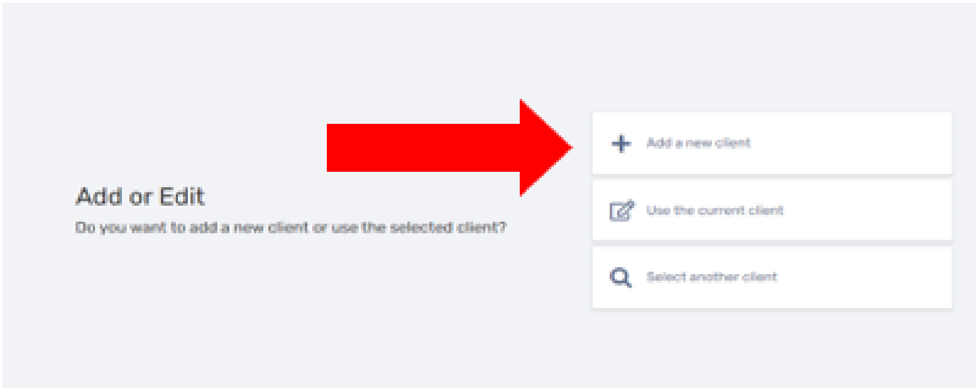
4. Always complete a **"Find Client"** search prior to adding a new client record in HMIS. This will alleviate duplicate client records. Click on the **"Find Client"** feature in the **"Client Workspace"**.
5. Complete the search information *(you may search by name, social security number, date of birth or client ID#)*. Next, click **"Search"**



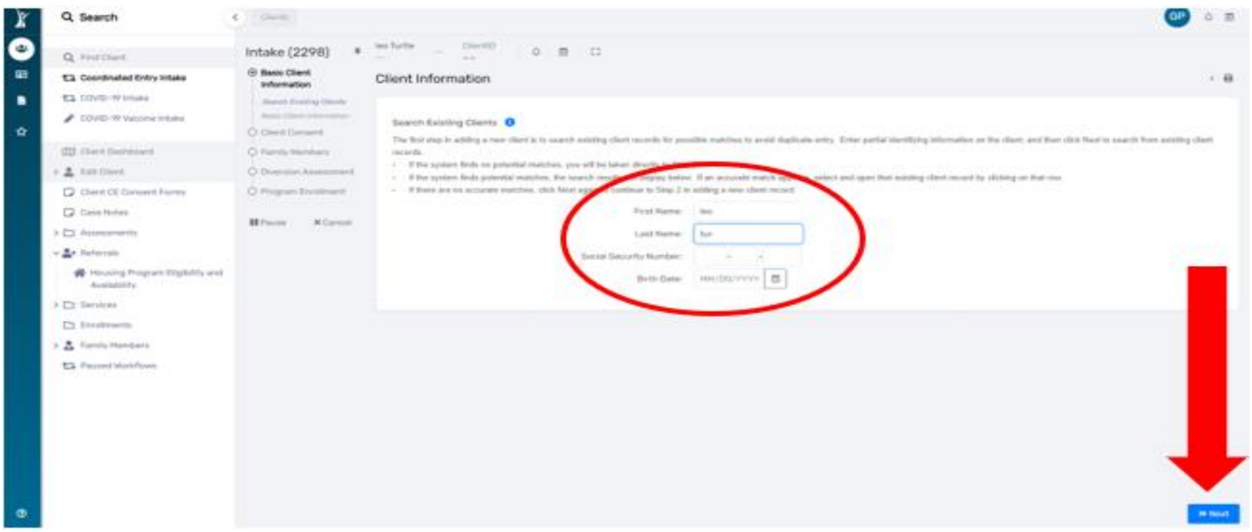
6. If no existing HMIS record is found, click on the **"Coordinated Entry Intake"** feature in **"Client Workspace"**.



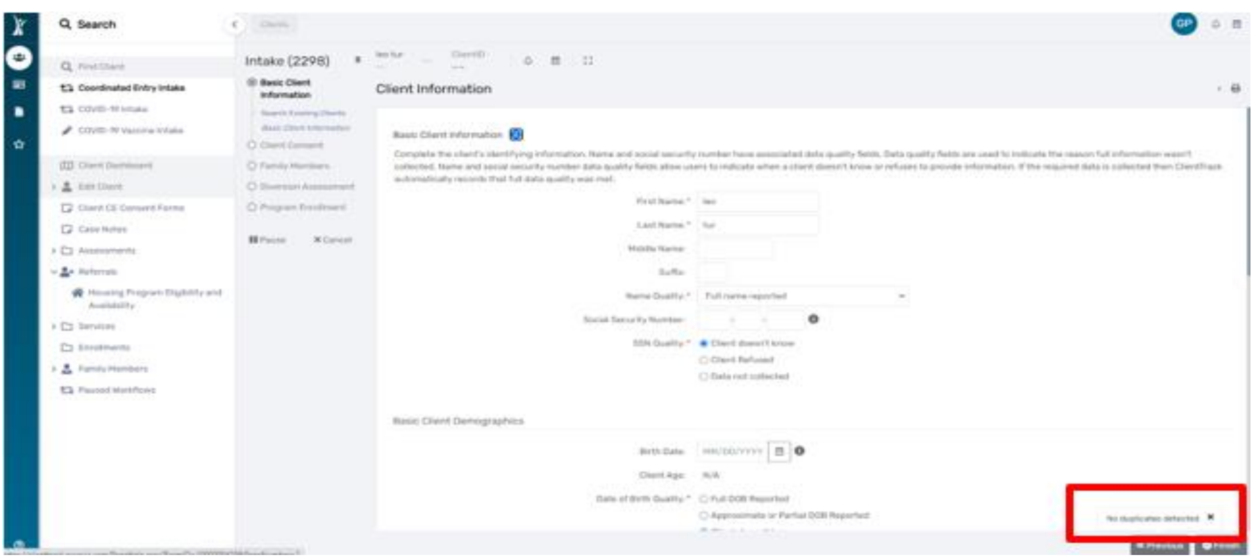
7. Click on **"Add a new client"**.



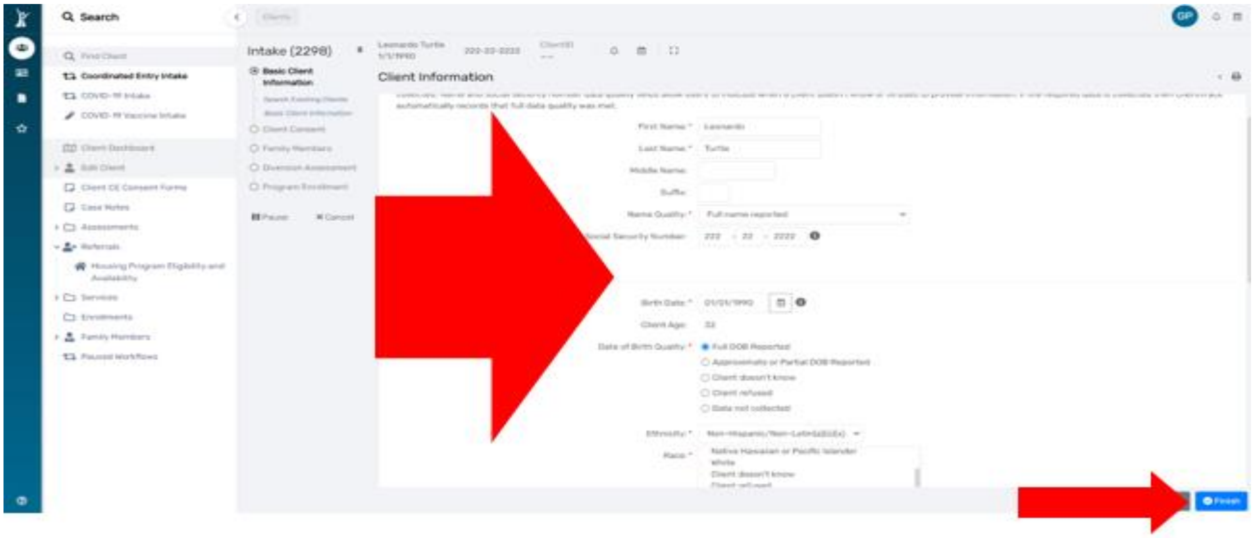
8. The system will perform a search for the client. Type in the first few letters of the clients First and Last Name (e.g., FN: Leo; LN: Tur for Leonardo Turtle) of the new client, then click the **"Next"** button.



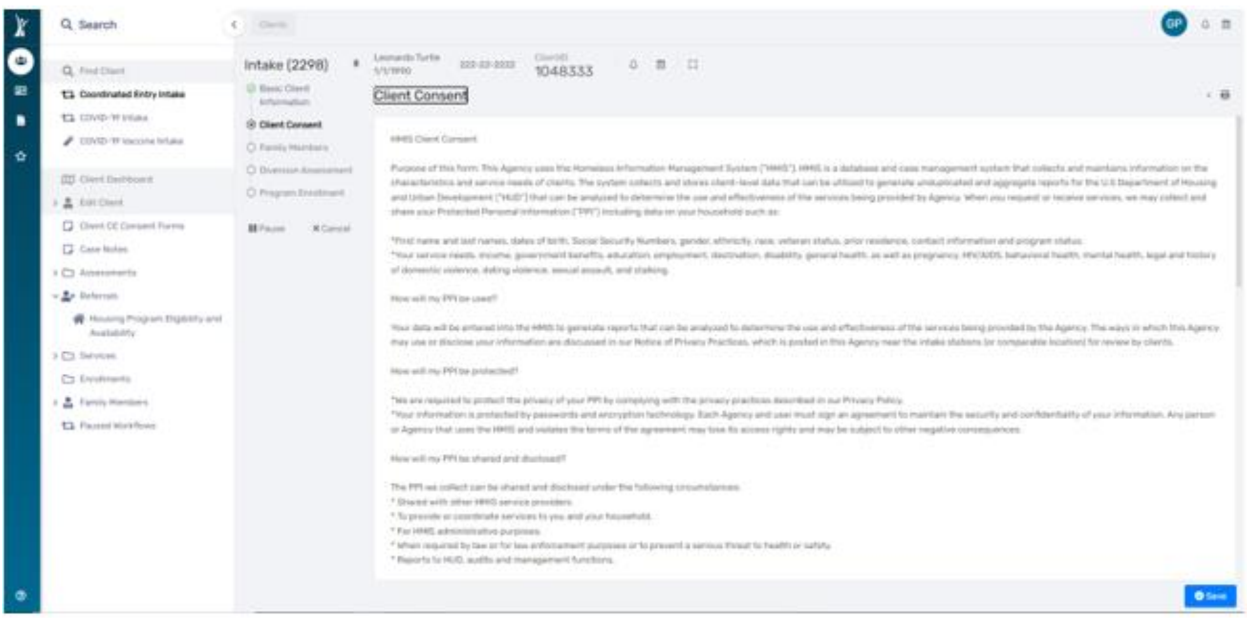
9. If the client is not currently entered in to the HMIS, the intake workflow will begin, and a "No Duplicates Detected" message will display on the intake workflow screen



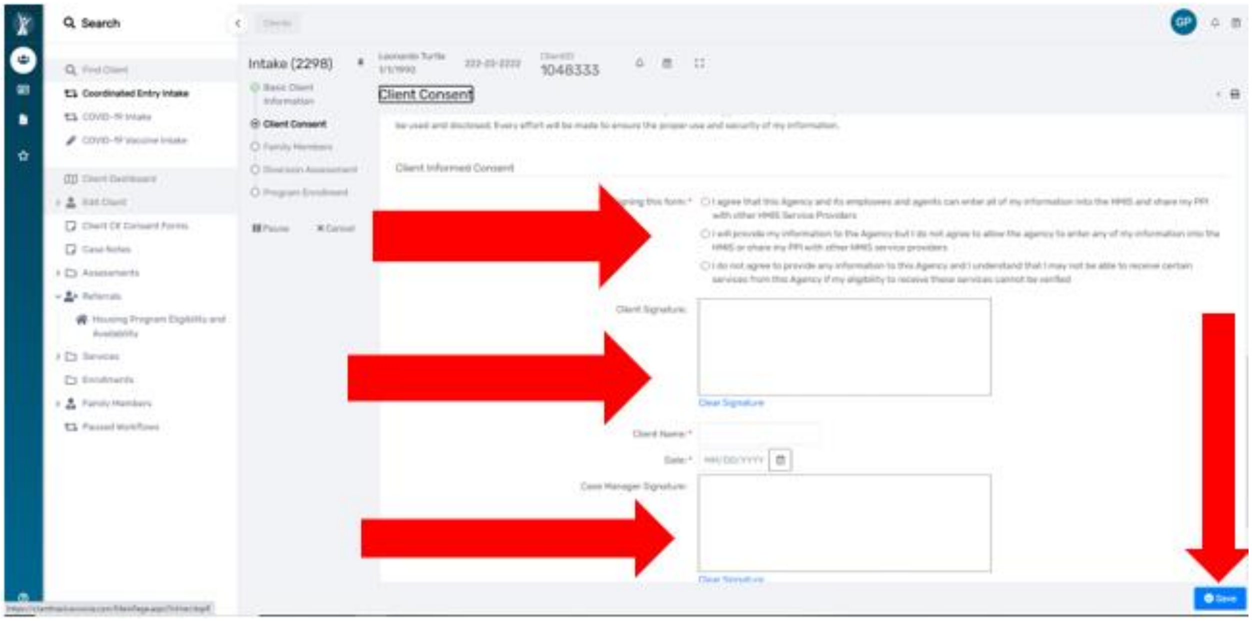
10. **Basic Client Information Assessment**: Complete all fields marked with a red asterisk *. Next, click the **"Finish"** button.



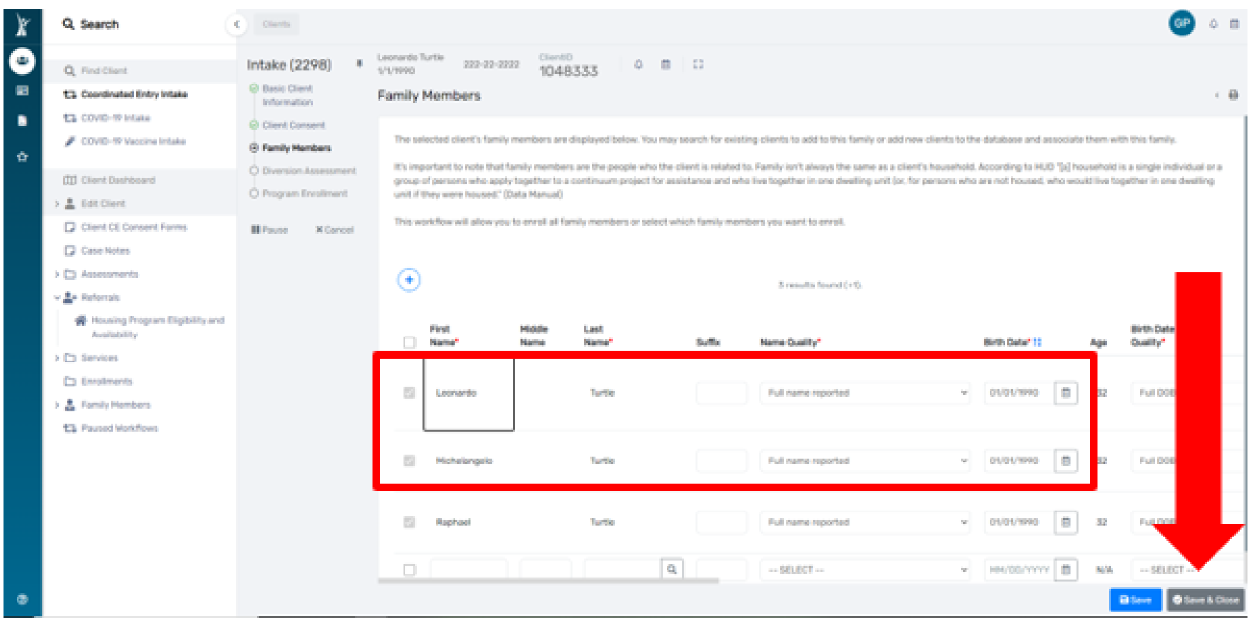
11. Please make sure the client reads the **"Client Consent"** ***before*** they sign the form. The client will choose one of the three available options in the **"Client Informed Consent"** section of the form. Next, the client will sign the form in the **"Client Signature"** box using the computer mouse or signature pad *(provided by the HMIS team upon request and subject to availability of stock).*



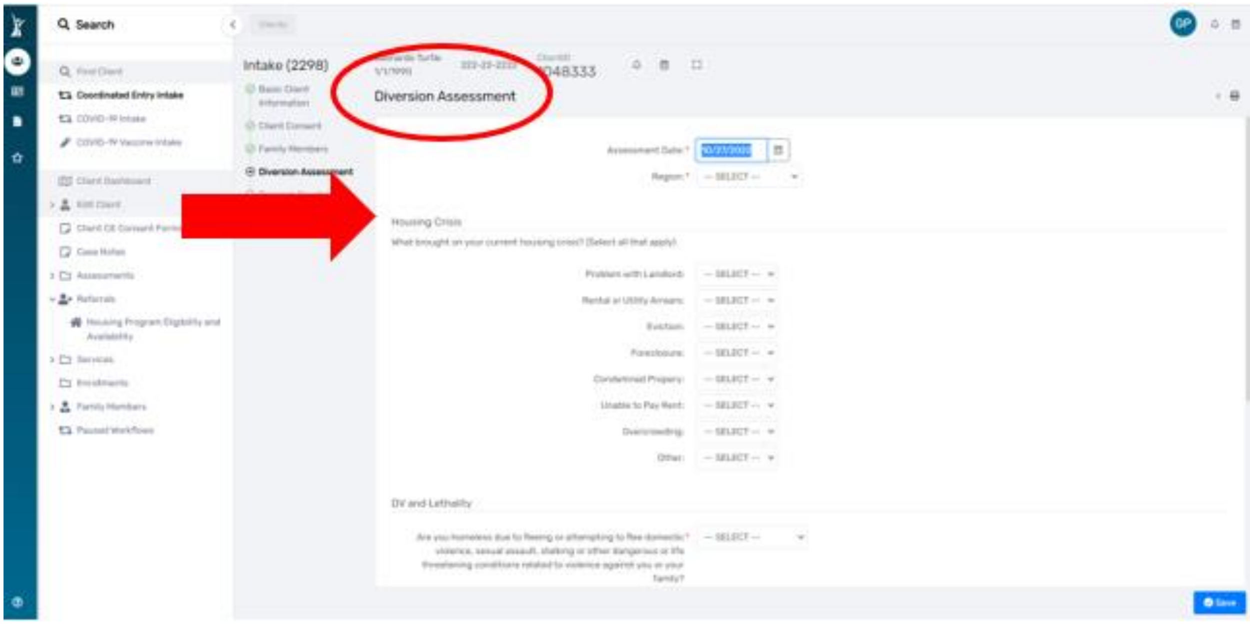
12. Complete the **"Client Name"** and **"Date"** field. Next, you will sign the form in the **"Case Manager Signature"** box. Complete the **"Case Manager Name"** and **"Date"** field. Next, click the **"Save"** button.



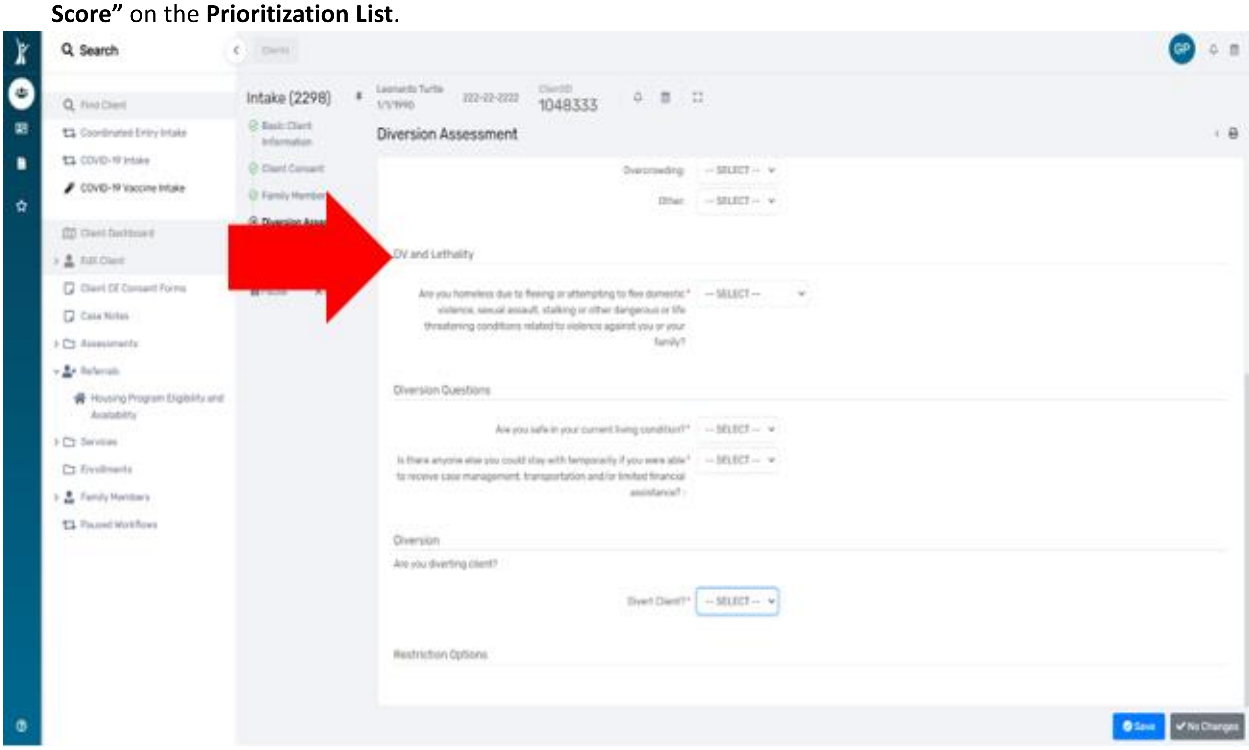
13. **Family Members Assessment**: If no changes are needed, click the **"Save and Close"** button. To add family members, complete the data fields for each family member. Click the **"Check Box"** to the left of the added family member's name(s) then click the **"Save and Close"** button.



14. The **"Diversion Assessment"** is a tool to assist with the **"Creative Conversation"** (Diversion) process with the client as you work together to identify possible alternative housing options. Complete the **"Region"** field, then move through the **"Housing Crisis"** fields to capture information pertaining to the client's current housing crisis.
15. Complete the **"Housing Crisis"** section.



16. **PLEASE NOTE: The "DV and Lethality" section is new to the CE Intake Workflow.** *If the client answers **"Yes"** to the question: "Are you homeless due to fleeing or attempting to flee domestic violence, sexual assault, stalking or other dangerous or life-threatening conditions related to violence against you or your family?",* the system will display the additional field: "Approximate date homelessness began" **(Please complete the date).**
17. Next, please complete the three "**Lethality Questions"** by selecting **"Yes" or "No"** for each question. The system will automatically calculate the **"Lethality Score"** for the DV survivor and display the **"Lethality Score"** on the **Prioritization List**.

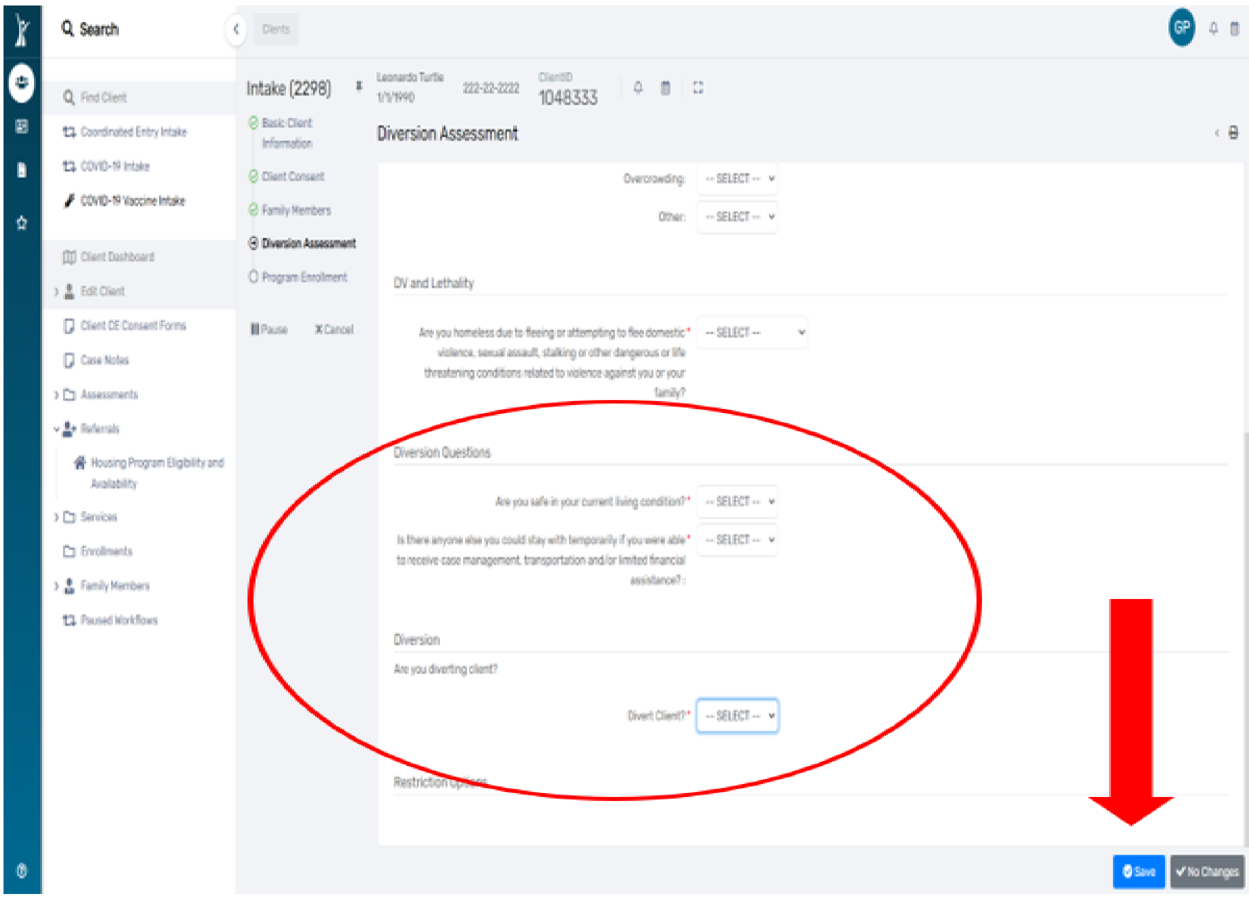


18. By adding these additional DV questions, CE Lead Agencies will be able to quickly identify DV survivors by the **"Lethality Score"** displayed on the **Prioritization List**

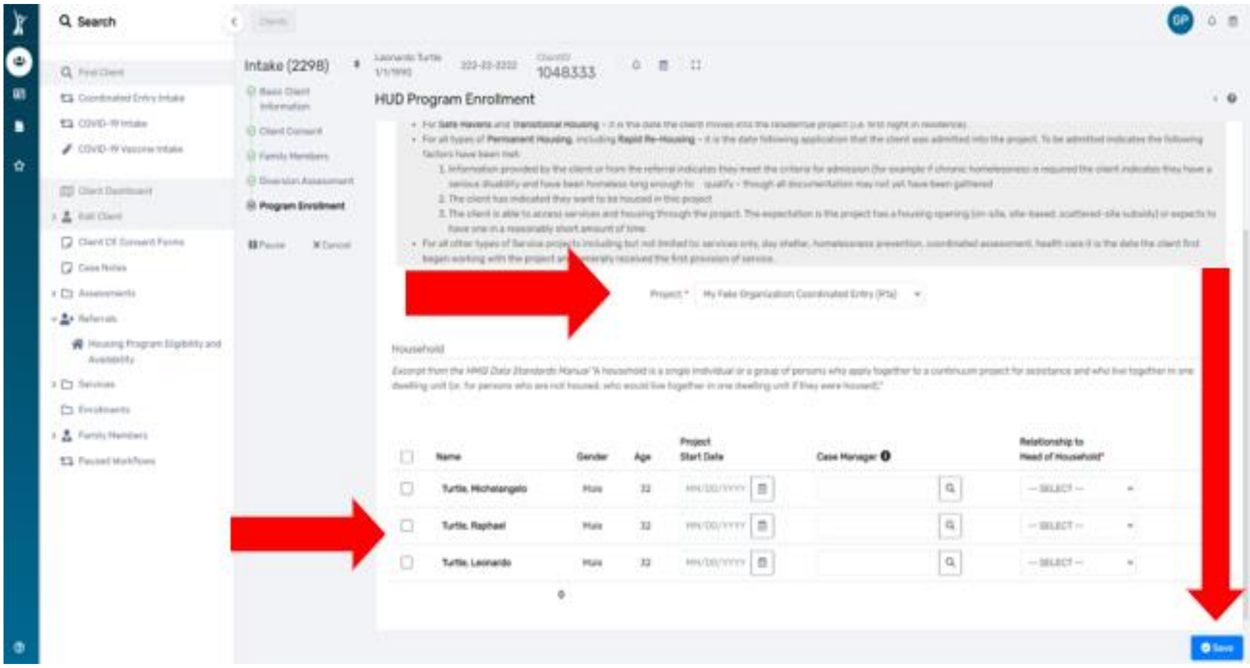
19. ***When domestic violence survivors are being assessed, please provide the client with a copy of the Safety Plan located in the Coordinated Entry Policies and Procedure manual. Next, reach out to the nearest DV Provider if the client needs immediate shelter, and offer the client a referral to the DV Provider for DV housing and supportive services.***

20. Complete the **"Diversion Questions"**. *If the client is diverted, the workflow will end. If the client is* ***NOT*** *diverted, the Intake workflow will continue.*

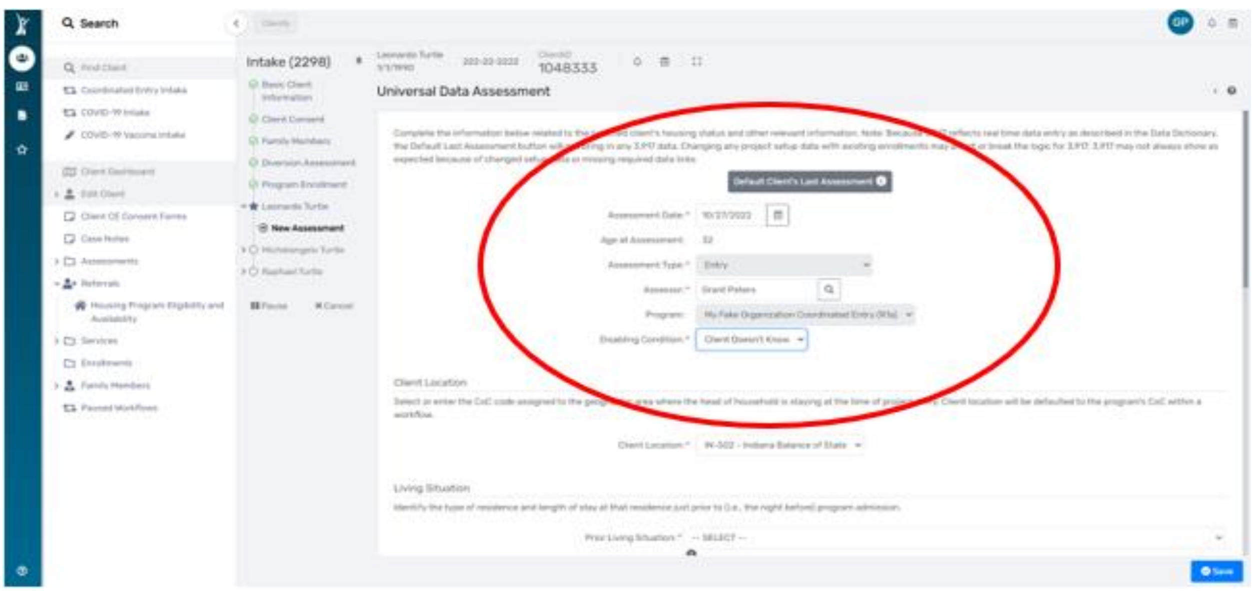
21. Click the **"Save"** button to continue.



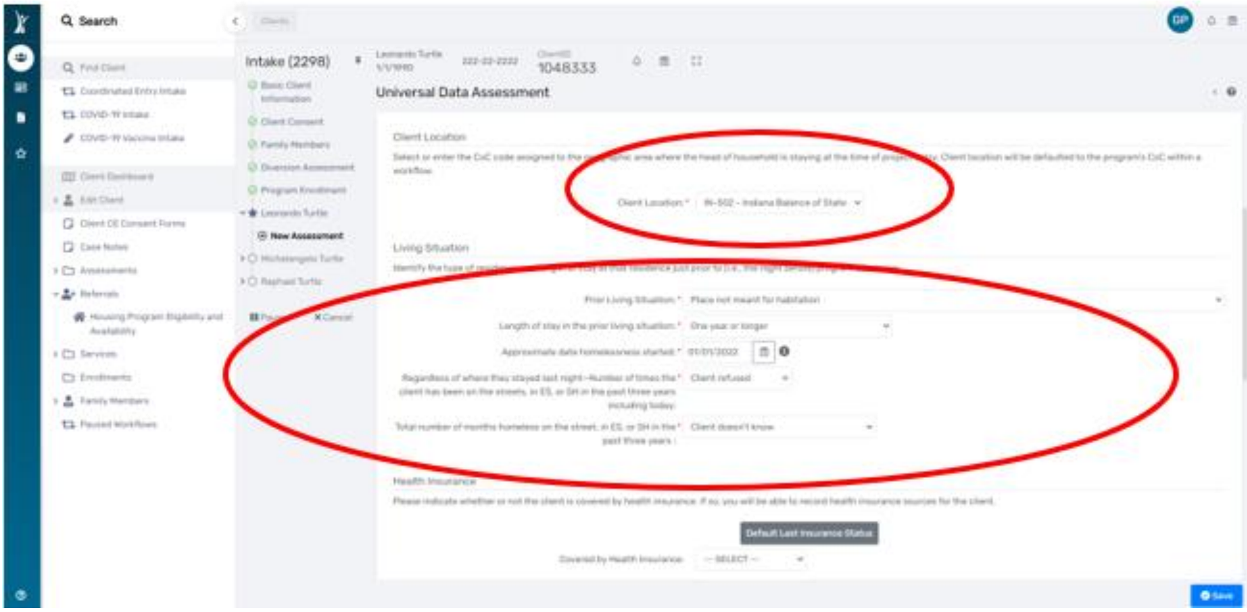
22. **HUD Program Enrollment Assessment:** Click on the drop-down arrow in the **"Project"** data field and choose the project. Next, click the check box to the left of each family member's name you wish to enroll in the program. Next, click the **"Save"** button.



23. **Universal Data Assessment:** Complete all fields marked with a red asterisk *.

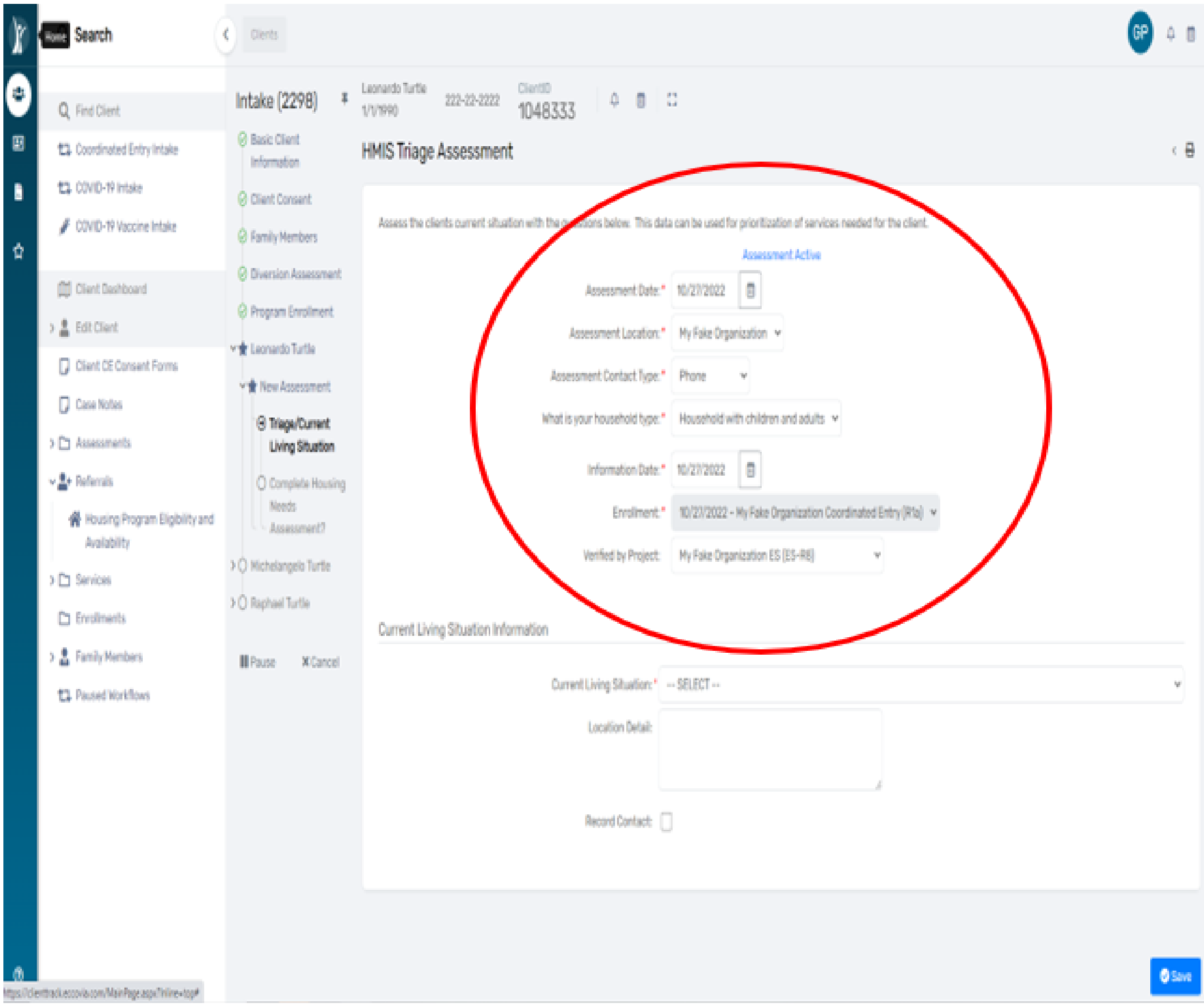


- **Assessment Date** – Date the assessment was completed with the client (field will auto-fill with today's date).
- **Assessment Type** – Defaulted and cannot be changed during the workflow. If you notice that you're completing the incorrect assessment, contact the HMIS Help Desk where you will be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

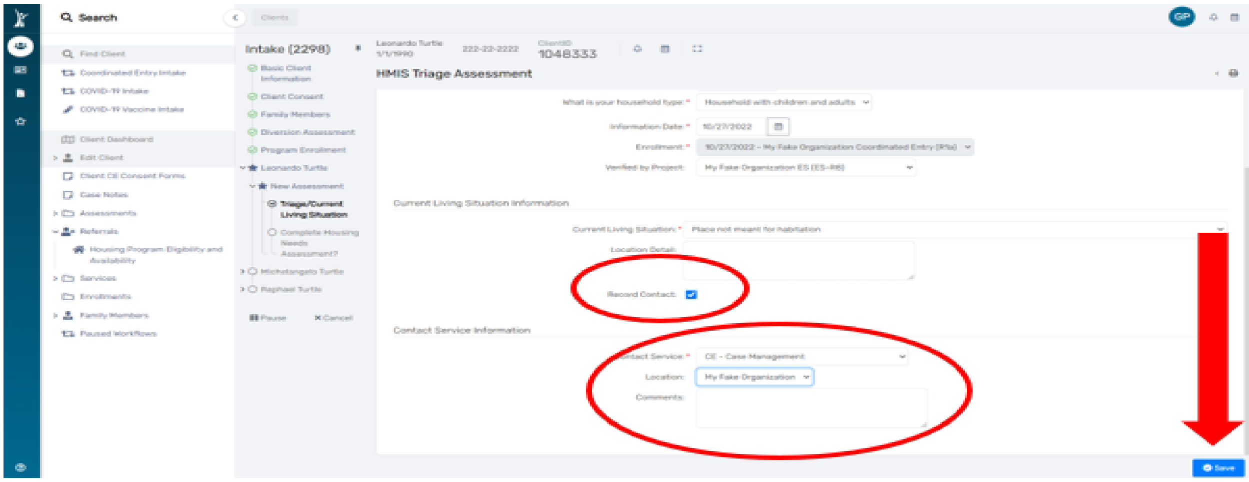


- **Client Location** – Defaulted information that is set up with your program in the system. If this information is missing when completing an assessment, please contact the HMIS Help Desk.
- **Prior Living Situation** – Identify where the client was staying on **<u>the night before</u>** the client 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.*

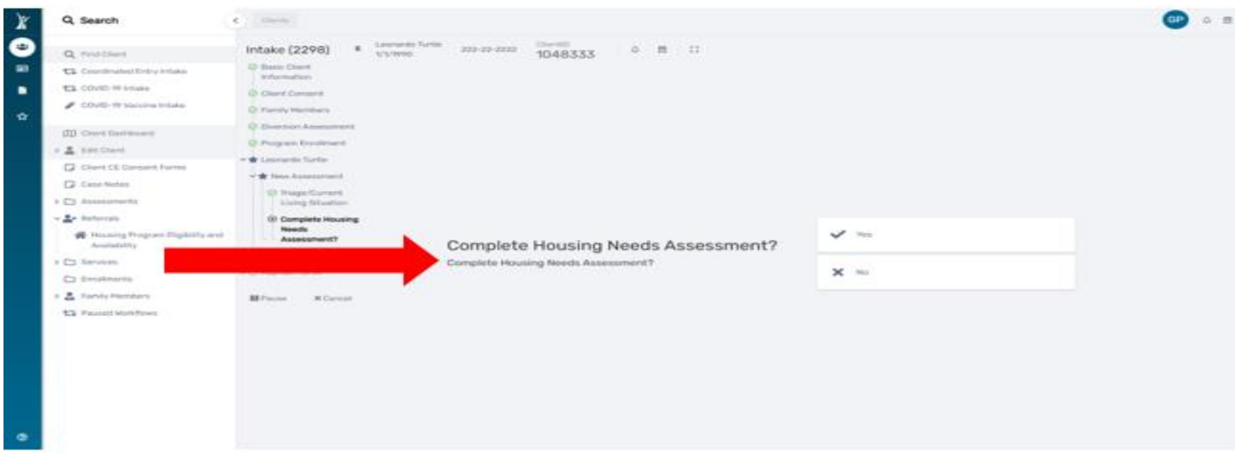
24. **Triage Assessment**: ***Please Note: The Triage Assessment is a new assessment implemented with the 2020 HUD Coordinated Entry Data Standards***



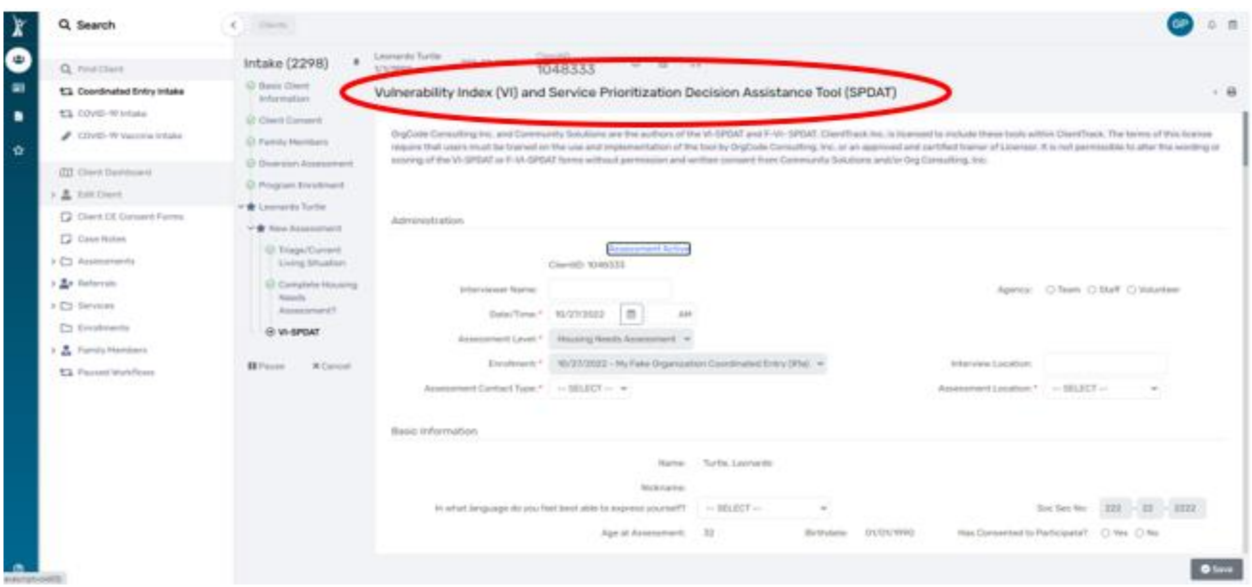
- Complete the **"Assessment Location"**
- Complete the **"Assessment Contact Type"**: Select the answer from the drop-down box
- Complete **"Current Living Situation"**: Select the answer from the drop-down box
- Complete **"Household Type"**
- Complete **"Information Date"**
- Complete **"Verified by Project"**
- **You MUST check the "Record Contact" checkbox** (This field is **REQUIRED,** and we are working on adding the **red asterisk *** as the required field indicator)
- " Select the **"Contact Service"** from the drop-down box then click **"Save**



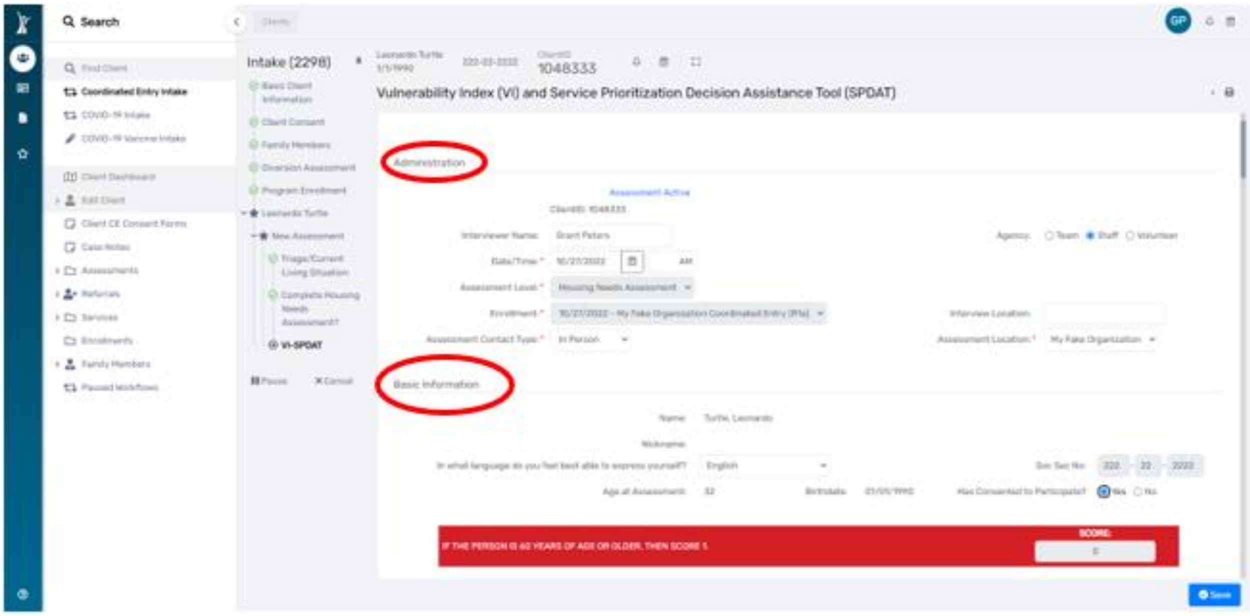
25. **VI-SPDAT Assessment/Housing Needs Assessment:** The system will default to the single Adult, Family, or TAY VI-SPDAT assessment, based on the client(s) enrolled in the project

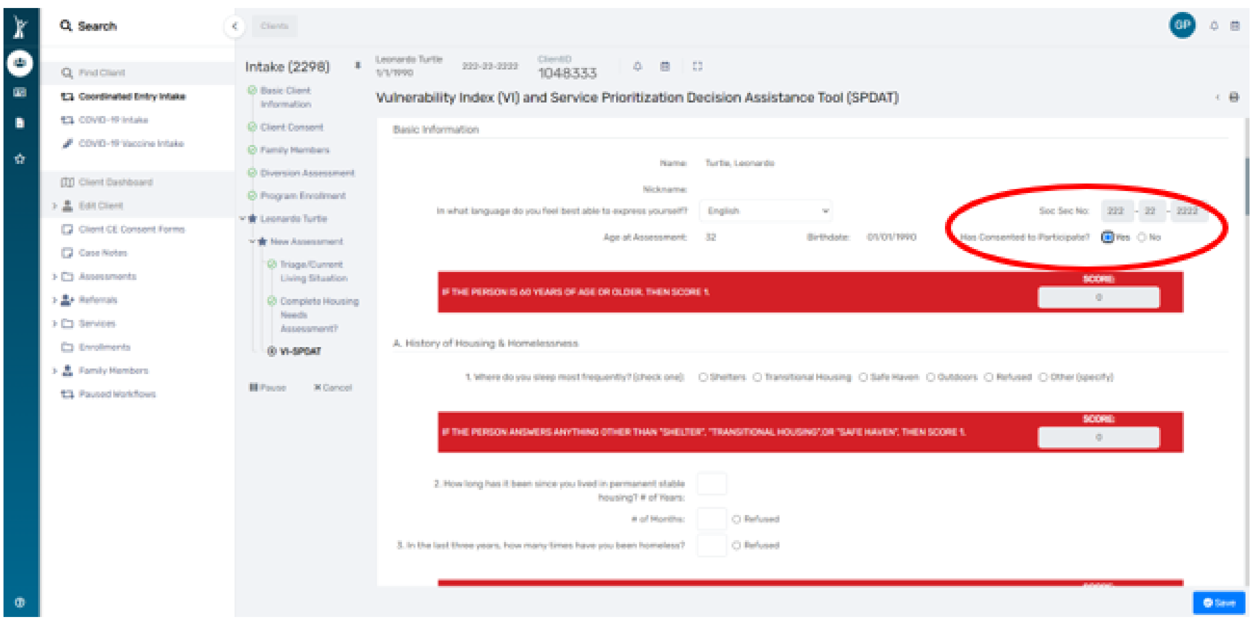


26. For our client, "Leonardo Turtle" the "VI-SPDAT" was chosen.

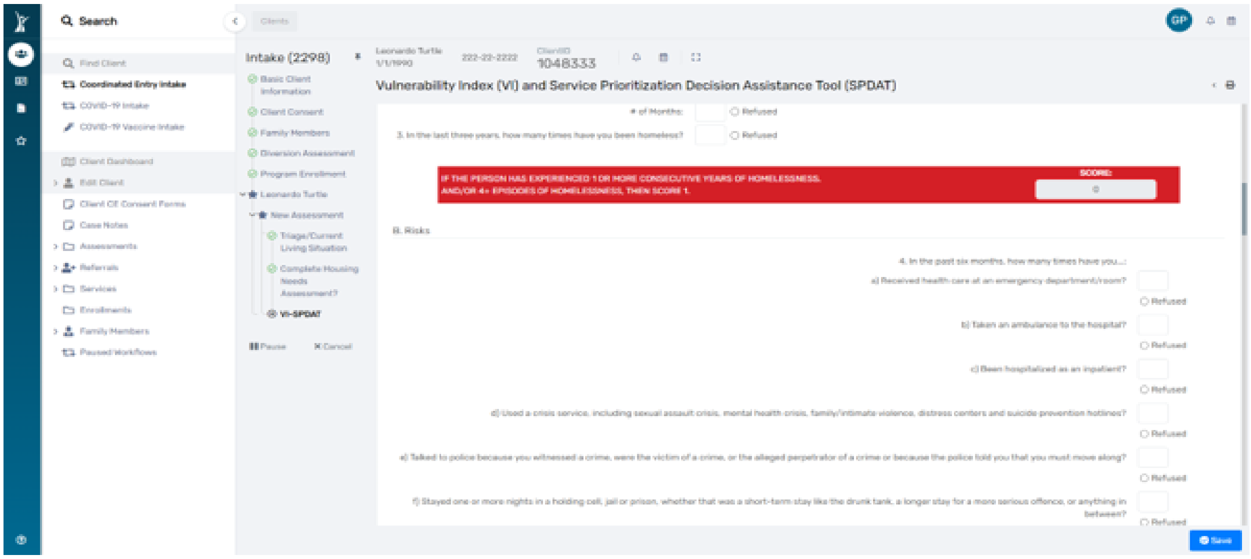


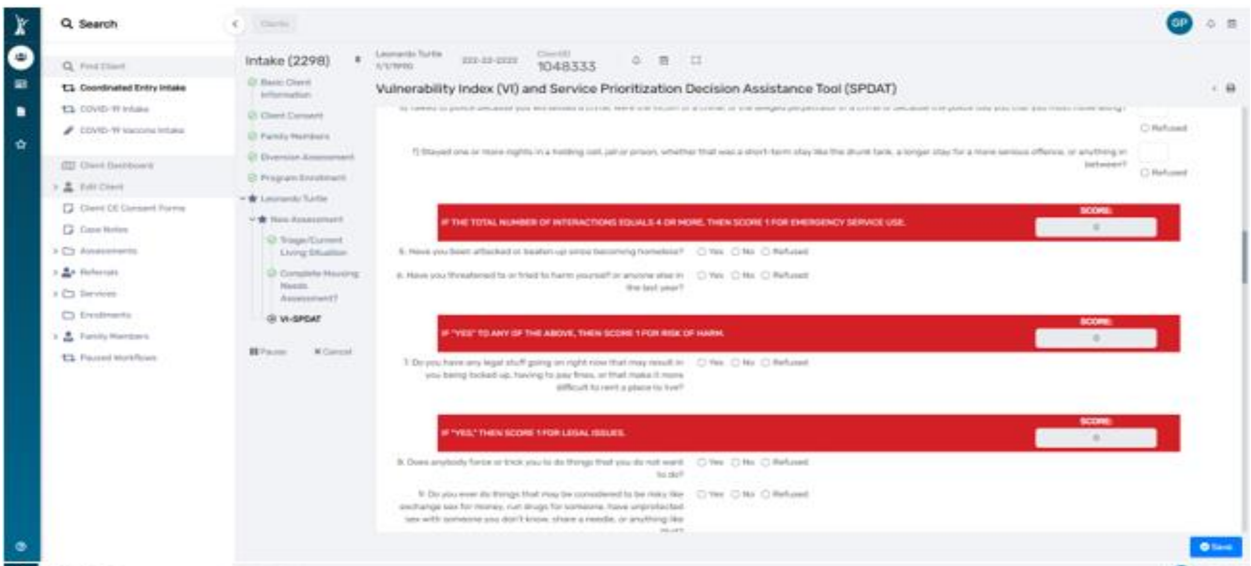
27. **Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT) Assessment:** Complete the data fields in the **"Administration"** and **"Basic Information"** section. **Mark the appropriate check box for the question "Has Consented to Participate", "Yes" or "No".**

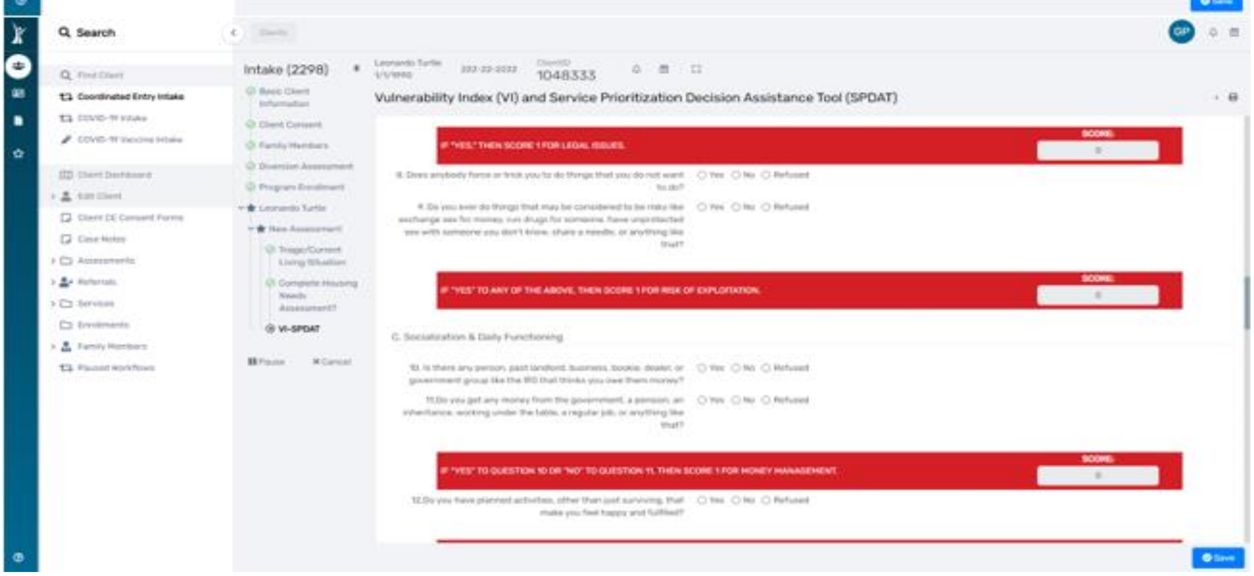


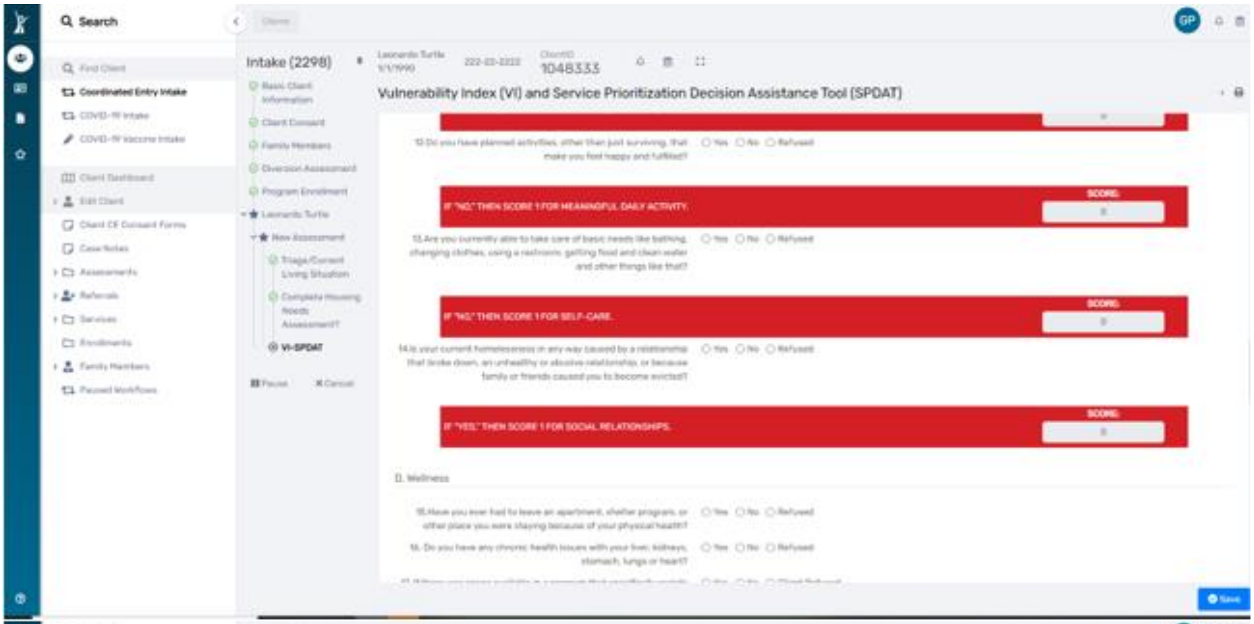


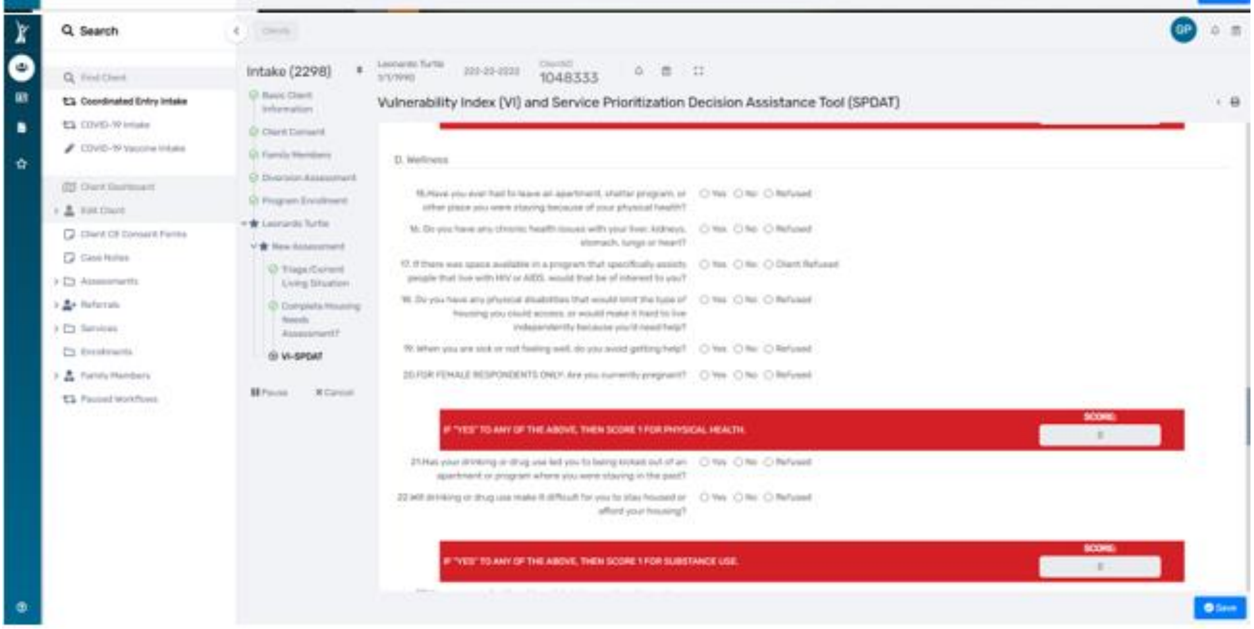
28. The tool will automatically calculate the client's vulnerability score as each of the answers to each question are completed. When finished, click the **"Save"** button, then click the **"Save and Close"** button

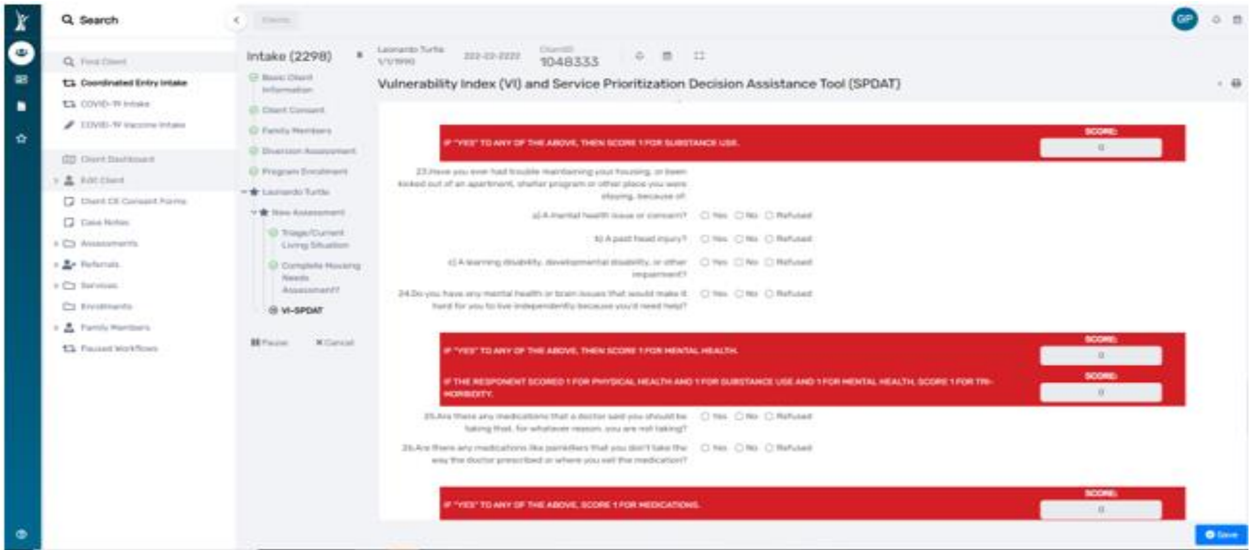

Search
Intake (2298)
Leonardo Turtle
1048333
Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)
IF THE PERSON HAS EXPERIENCED 1 OR MORE CONSECUTIVE YEARS OF HOMELESSNESS, AND/OR 4+ EPISODES OF HOMELESSNESS, THEN SCORE 1.
SCORE:
B. Risks
VI-SPDAT
Save

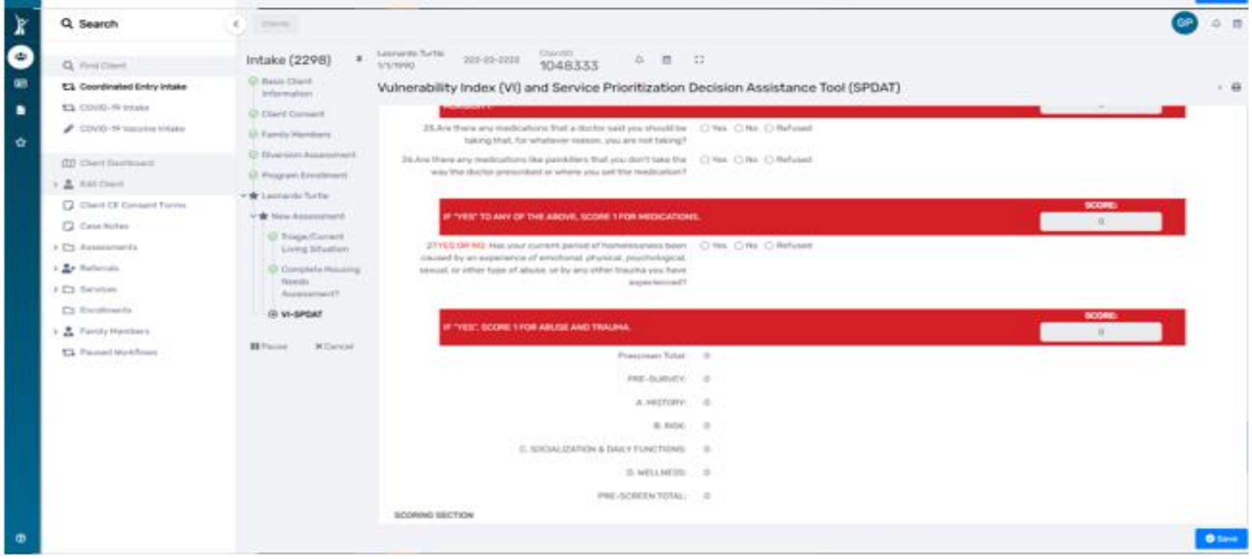

Search
Intake (2298)
1048333
Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)
IF THE TOTAL NUMBER OF INTERACTIONS EQUALS 4 OR MORE, THEN SCORE 1 FOR EMERGENCY SERVICE USE.
IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR RISK OF HARM.
IF "YES," THEN SCORE 1 FOR LEGAL ISSUES.
SCORE:
VI-SPDAT
Save

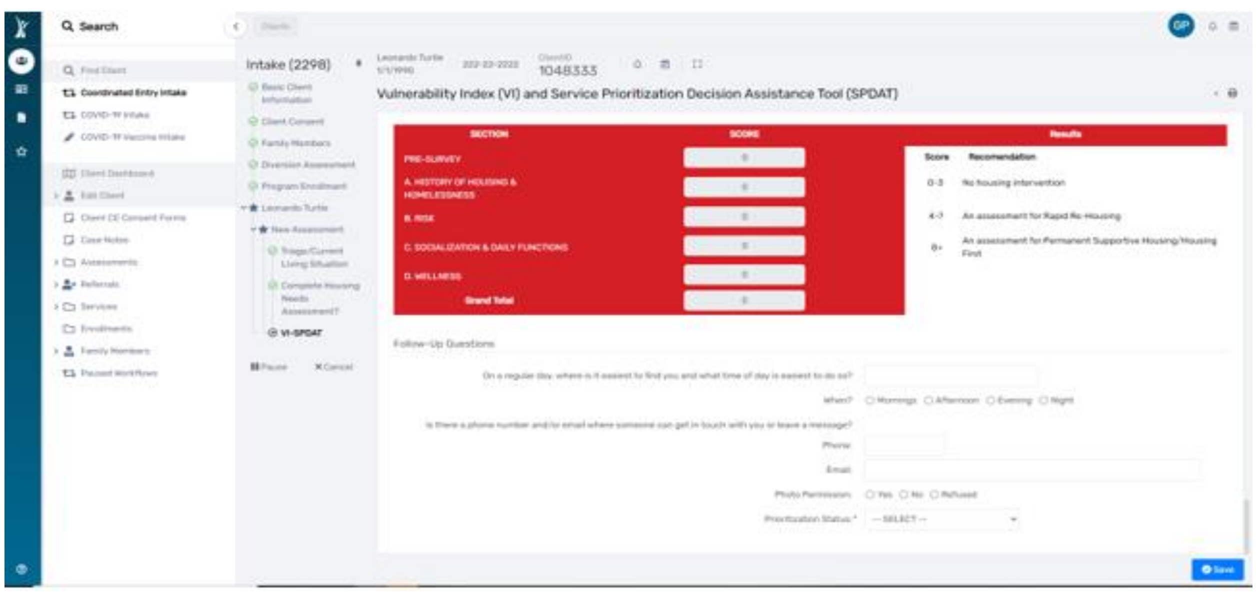

Search
Intake (2298)
1048333
Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)
IF "YES," THEN SCORE 1 FOR LEGAL ISSUES.
IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR RISK OF EXPLOITATION.
C. Socialization & Daily Functioning
IF "YES" TO QUESTION 10 OR "NO" TO QUESTION 11, THEN SCORE 1 FOR MONEY MANAGEMENT.
SCORE:
VI-SPDAT
Save



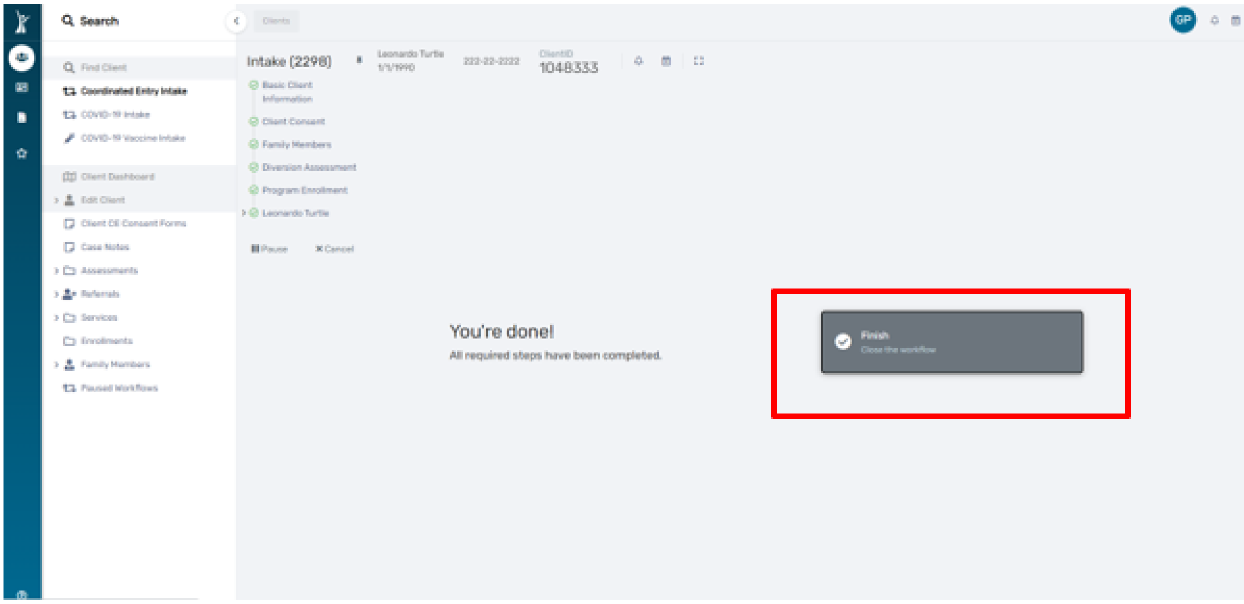



Search
Intake (2298)
1048333
Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)

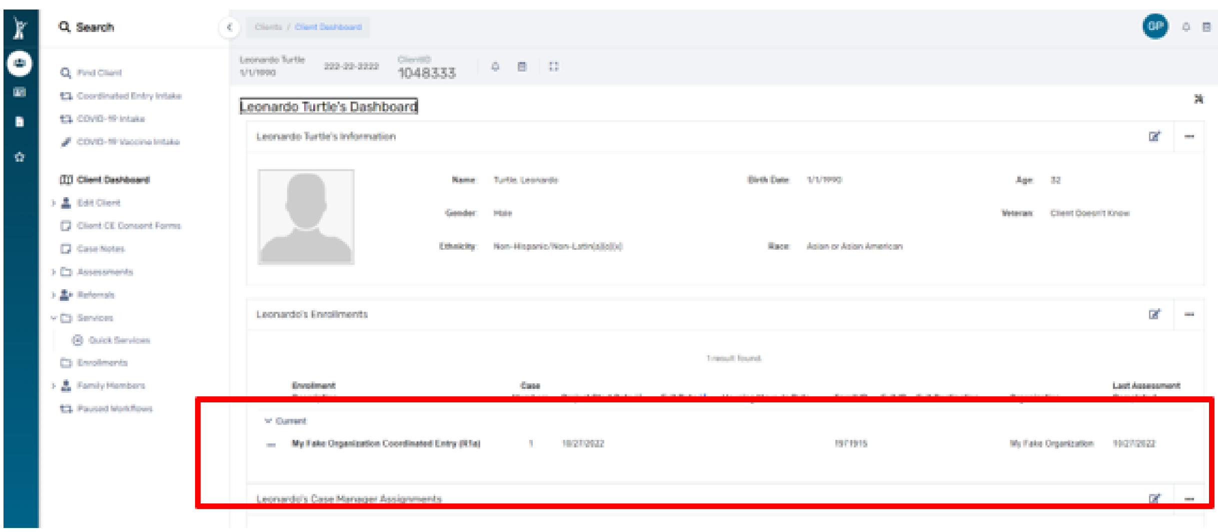

Search
Intake (2298)
1048333
Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)


Search
Intake (2298)
1048333
Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)

29. To complete the Intake workflow, Click the **"Finish"** button.



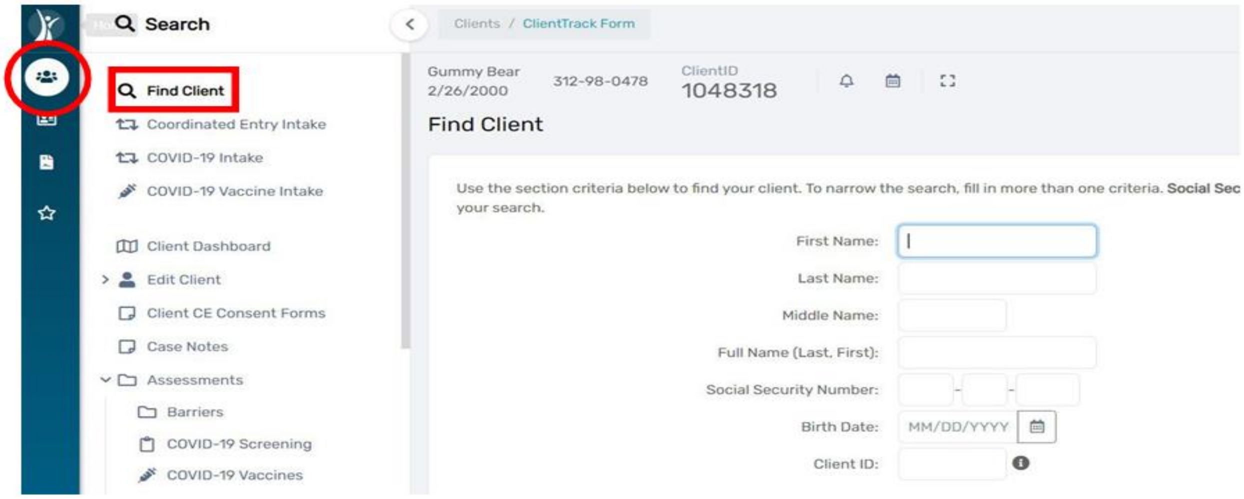
30. The enrollment for Coordinated Entry now appears on the **"Client Dashboard"**



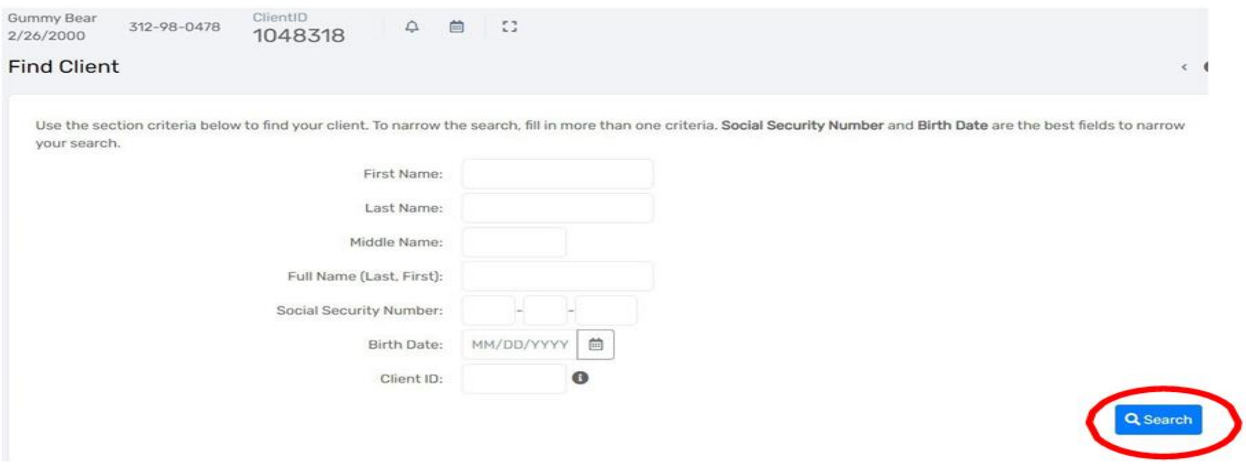
UPDATING A VI-SPDAT ASSESSMENT EVERY 90 DAYS

When a client has been enrolled in Coordinated Entry for 90 days or longer – a new VI-SPDAT Assessment is required. This process is to ensure the Client's information is up to date.

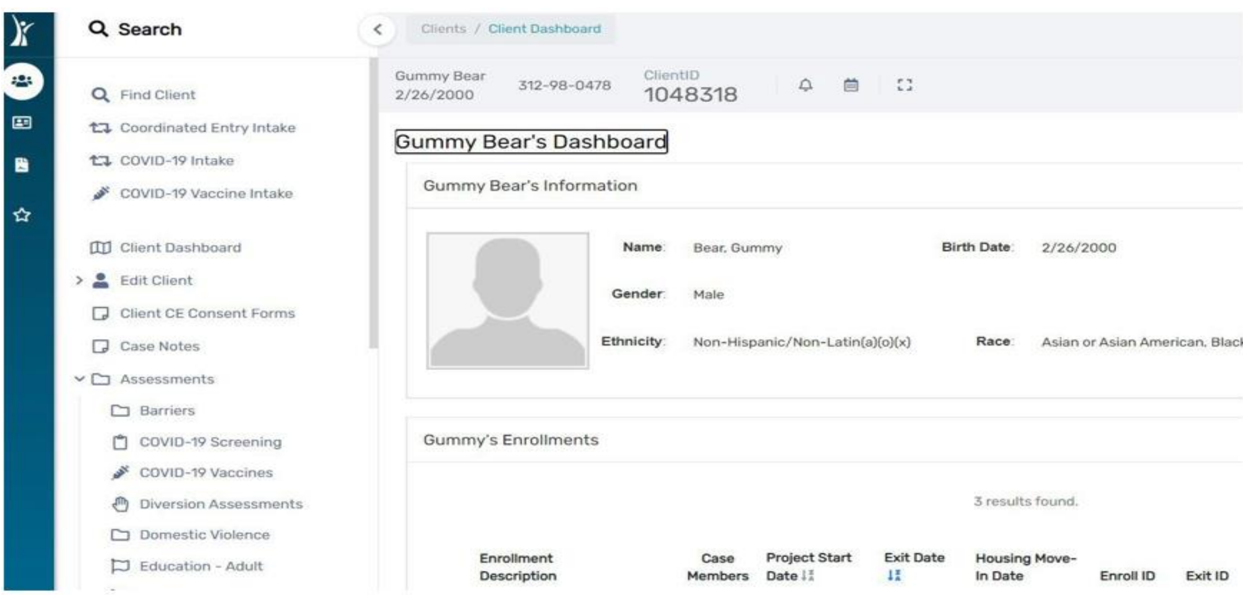
1. Log in to HMIS using the **"2020 Coordinated Entry"** workgroup and your **"Coordinated Entry Region #"** as the organization.
2. Click on the **people icon for "Clients"** and then click on **"Find Client."**



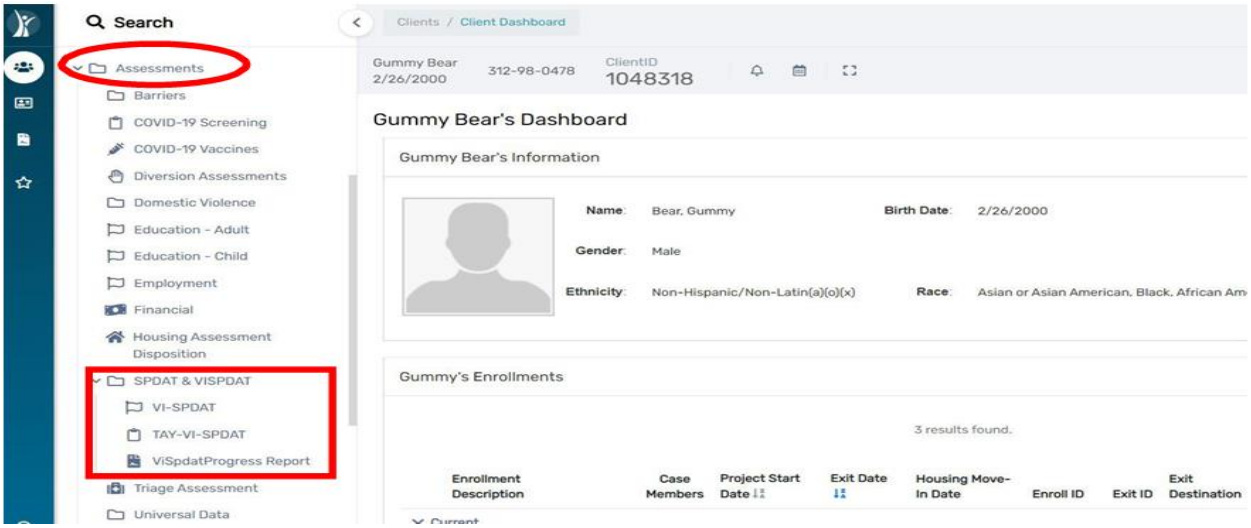
3. Search for the Client by typing in their **"Name"**, **"SSN"**, **"DOB"** or **"Client ID#"**.
4. Next, click on the blue "Search" button located in the middle right section of the screen as shown below.



5. Once you find your client, you will be taken to their client dashboard.

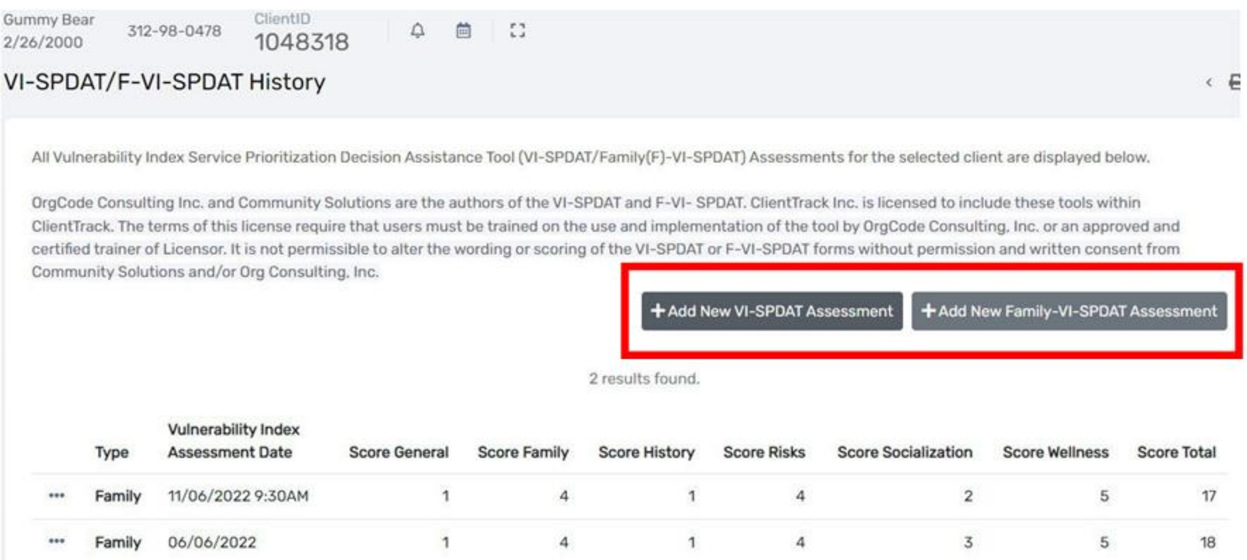


6. Click on **"Assessments"** located in the white menu on the left-hand side. Move your cursor down to **"SPDAT & VISPDAT" tab,** and then select **"VI-SPDAT"**, **"TAY-VI-SPDAT"** or **"VI-SPDAT Progress Report"** from the drop-down menu. Click on **"VI-SPDAT"** for Adult Clients and click on **"TAY-VI-SPDAT"** for Youth (16 – 24 years of age).

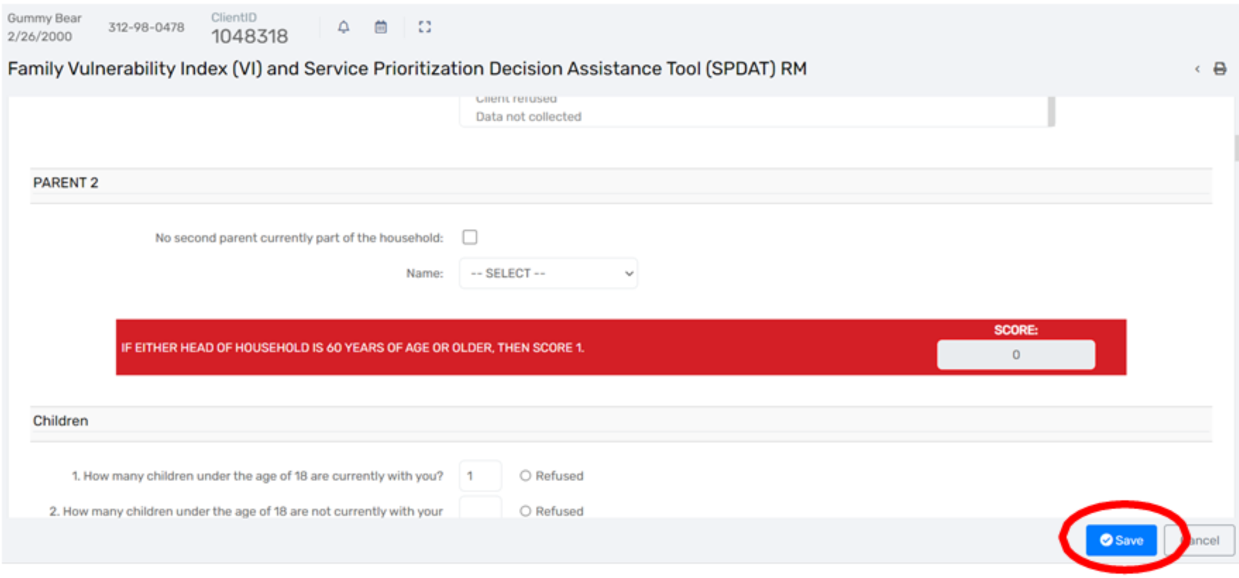


The next screen will show a running view of the VI-SPDATS completed for this Client.

7. Select the **"VI-SPDAT"** option from the step above, click on **"Add New VI-SPDAT Assessment"** for single adults and **"Add new Family VI-SPDAT Assessment"** for families in the upper right corner of the screen.



8. This will launch the **VI-SPDAT Assessment**. Complete each of the assessment questions. The VI-SPDAT will self-score. Once you have completed the assessment, click **"Save"** in the bottom right corner of your screen.



9. This will take you back to the Client's VI-SPDAT History screen and will reflect the updated assessment and score.

You have now completed a New Assessment on the existing Client and updated the Client's Assessment date and score.

A new VI-SPDAT, Family SPDAT, or TAY-VI-SPDAT is required every 90 days for open Coordinated Entry enrolled Clients.