



HMIS USER MANUAL

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

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OBJECTIVES

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

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

In this manual you will find the following information:

CONTACTS

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

SECURITY POLICIES & PROCEDURES

- Implied Consent Policy
- Computer storage
- Username and password

OVERVIEW OF CLIENTTRACK FEATURES

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

MANAGEMENT OF CLIENT INFORMATION AND PROGRAM ENROLLMENTS

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

BASIC REPORTS

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

CONTACTS

HMIS TEAM MEMBERS

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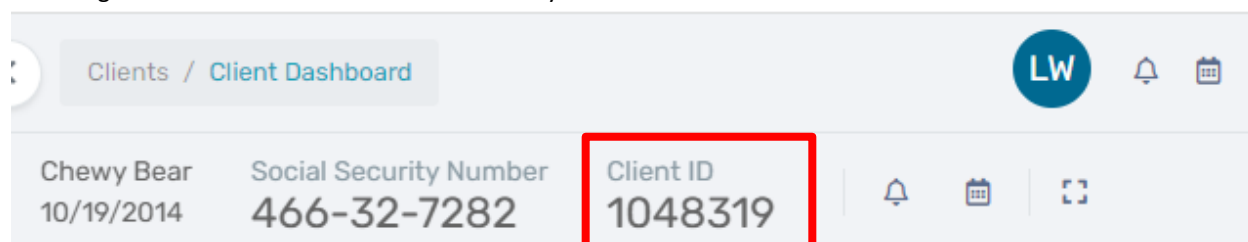
HMIS ESG CV Data Analyst

317-232-1235

Dboltz@ihcda.in.gov

HMIS HELP DESK

If you encounter any issues with ClientTrack at any time, please contact the help desk with the email address below. **Please do not send any identifying information for clients when emailing the help desk.** There is a unique client ID number assigned to each client record in the system. This number is found at the top of the client record to the right of the client's name and 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 IHCD website at: <https://www.in.gov/ihcda/indiana-balance-of-state-continuum-of-care/>

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

CLIENTTRACK COMPUTERS

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

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

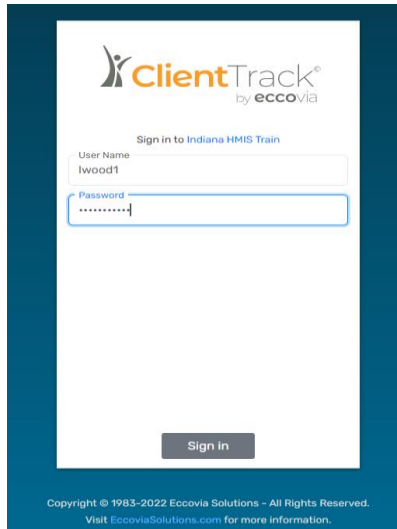
- At least one number
- Between 8 and 12 characters
- At least one non-letter, non-numeric character (!#@\$)
- At least one capital letter

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

LOGGING INTO THE SYSTEM

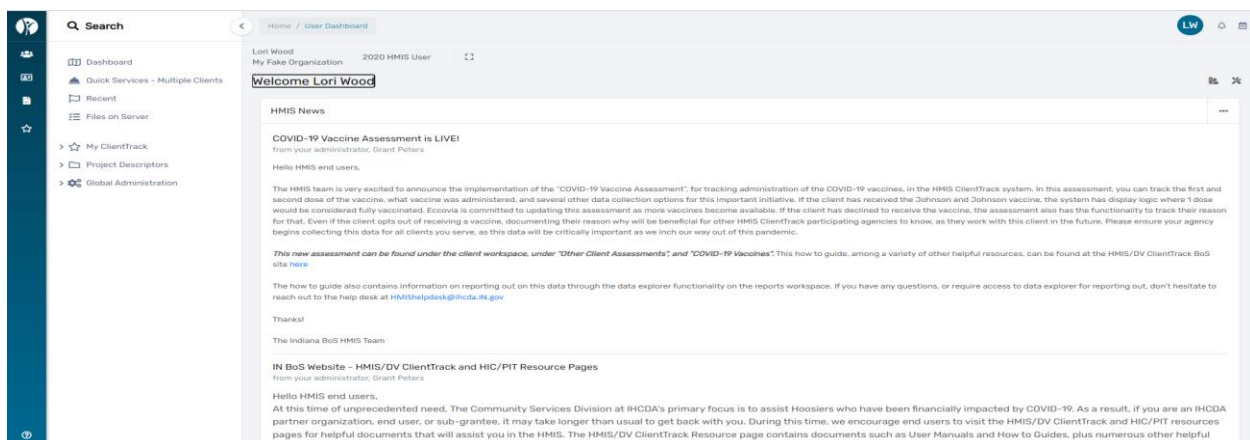
ClientTrack is a web-based application, and you will need to use an internet browser to access it. ClientTrack works with Google Chrome, Mobile Safari, and Mozilla's Firefox. Some older versions of these web browsers can cause unique issues in ClientTrack. We recommend that you work with your IT personnel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

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



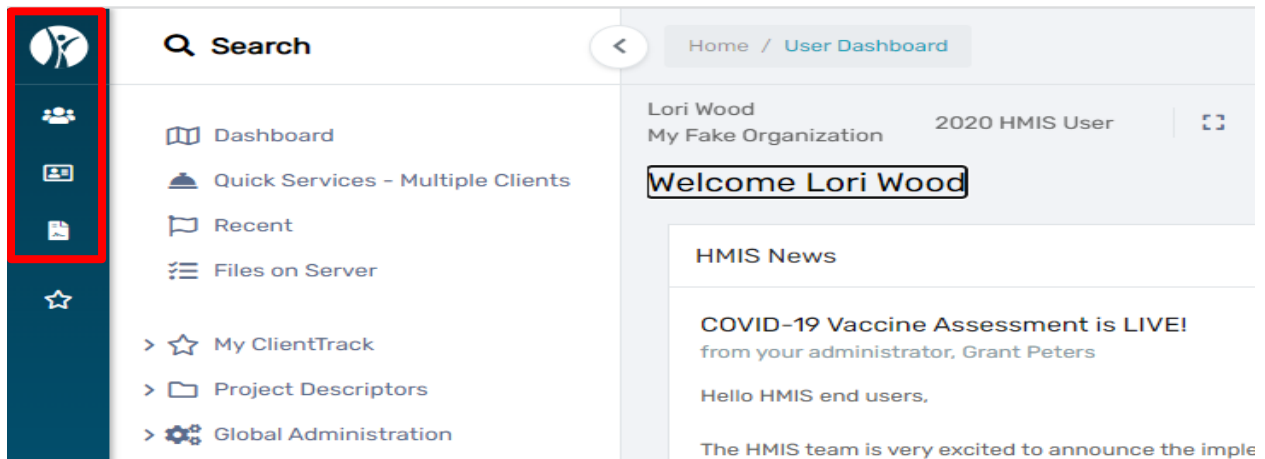
USER DASHBOARD

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 IHCD wishes to communicate (i.e., upcoming trainings, changes etc.).

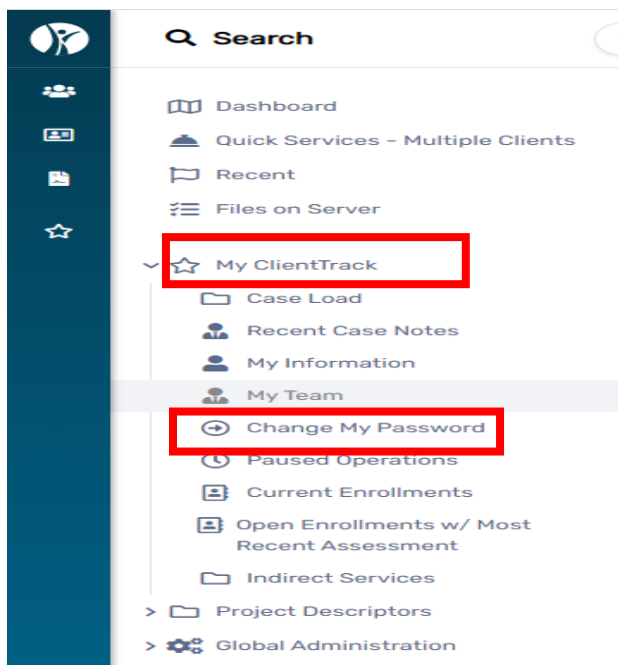


OVERVIEW OF CLIENTTRACK FEATURES

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.



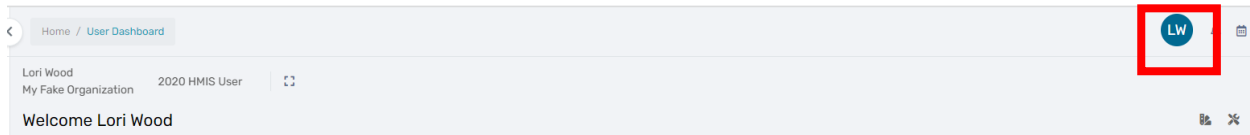
After clicking on that icon, you will see the four boxes appear labeled, **“Home,” “Clients,” “Providers,”** and **“Reports”** and you can toggle between them by clicking on the appropriate box to take you to that section of ClientTrack as seen below.



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.**



Settings [X]

PROFILE



Lori Wood
lwood1@ihcda.in.gov
Indiana HMIS Train

[Sign Out](#)

ACCOUNT SETTINGS

Workgroup
2020 HMIS User


Organization
My Fake Organization

Location
My Fake Organization

[Apply](#)

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)*

PROFILE



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Indiana HMIS Train

[Sign Out](#)

ACCOUNT SETTINGS

Workgroup
2020 Coordinated Entry

Organization
Coordinated Entry Region 1

Location
CE Region 1

[Apply](#)

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:

Chewy Bear's Dashboard

Chewy Bear's Information

Name: Bear, Chewy Birth Date: 10/19/2014 Age: 8
 Gender: Male Veteran:
 Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x) Race: Asian or Asian American, Black, African American, or African

Chewy's Enrollments

2 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination	Last Assessed
Coordinated Entry								
My Fake Organization Coordinated Entry (R1a)	2	06/06/2022		09/06/2022	1971887	1971909	Rental by client with RRH...	9/6/2022
PH - Rapid Re-Housing								
My Fake Organization CoC RRH (RRH-R8)	2	09/06/2022		11/04/2022	1971906	1971916	Rental by client in a pub...	11/4/2022

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.

Chewy Bear's Dashboard

Chewy Bear's Information


Name: Bear, Chewy Birth Date: 10/19/2014 Age: 8
 Gender: Male Veteran:
 Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x) Race: Asian or Asian American, Black, African American, or African

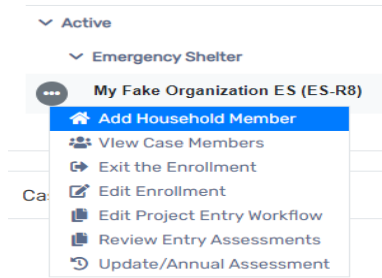
In the center of the client dashboard, you will see all the client's past and present **program enrollments**.

Chewy's Enrollments

2 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination	Last Assessed
Coordinated Entry								
My Fake Organization Coordinated Entry (R1a)	2	06/06/2022		09/06/2022	1971887	1971909	Rental by client with RRH...	9/6/2022
PH - Rapid Re-Housing								
My Fake Organization CoC RRH (RRH-R8)	2	09/06/2022		11/04/2022	1971906	1971916	Rental by client in a pub...	11/4/2022

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.

Search

Clients / Client Dashboard

First Class 9/9/1999 Social Security Number 467-28-3716 Client ID 1048327

First Class's Dashboard

First Class's Information

Name: Class, First
Gender: Female
Ethnicity: Hispanic/Latin(a)(o)(x)

First's Enrollments

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date
Active			
PH - Rapid Re-Housing			
My Fake Organization CoC RRH (RRH-R8)	1	06/15/2022	11/08/2022

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.

Search

Client Dashboard
Find Client
Intake
COVID-19 Intake
COVID-19 Vaccine Intake

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.

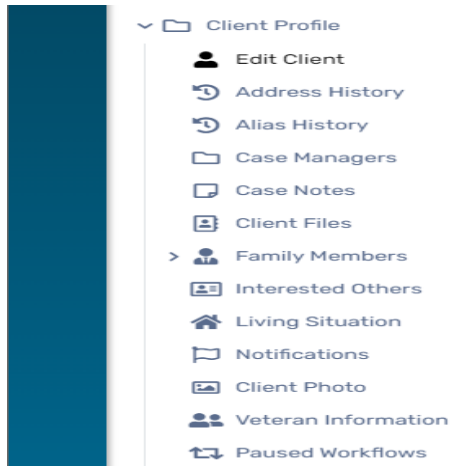
Case Notes – To create and review case notes.

Family Members – To review household members.


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

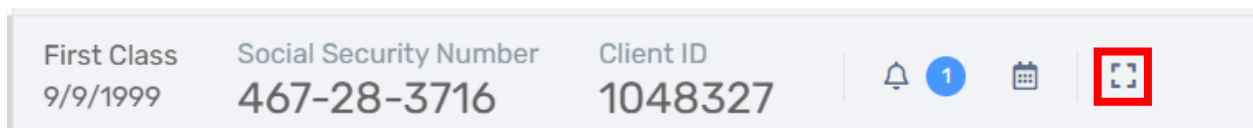
Veteran Information – Allows you to collect and enter data about the veteran's service

Paused Workflows – To resume a workflow you previously paused.

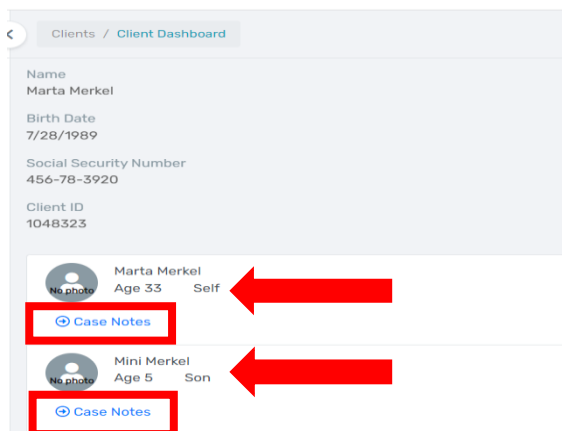


HOUSEHOLD MEMBERS

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*.

Search

Client Dashboard

Find Client

Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Profile

Common Client Assessments

Other Assessments

Client Enrollment and Client Services

Marta Merkel's Dashboard

Marta Merkel's Information

Name: Merkel, Marta

Birth Date: 7/28/1989

Gender: Female

Ethnicity: Non-Hispanic/Non-Latin(a) [o][x]

Race: Black, African American, or African, Native Hawaiian or Pacific Islander, White

Marta's Enrollments

2 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination
Active							
Coordinated Entry							
My Fake Organization Coordinated Entry (R1a)	1	11/07/2022			1971920		

- Next, click on the **“Bell”** icon located to the right of the Client ID# at the top of the page

Clients / Client Dashboard

Marta Merkel

7/28/1989

Social Security Number

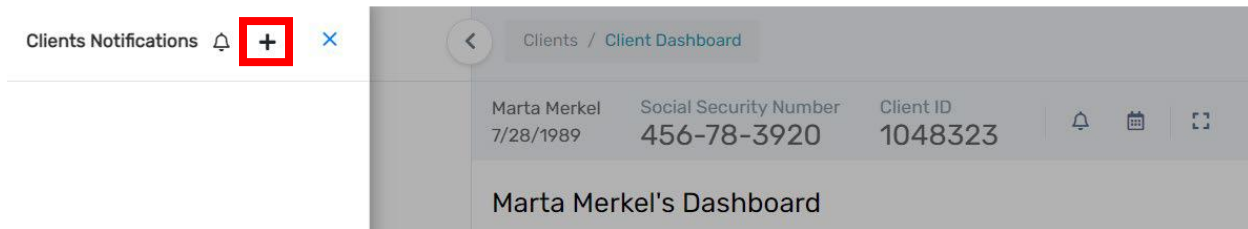
456-78-3920

Client ID

1048323

Marta Merkel's Dashboard

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.

 The screenshot shows a 'Add Notification' window. It has a title bar with a close button. The main area is titled 'Notification'. It contains several form fields:

- 'Message: *' with a text input field.
- 'Notification Type: *' with radio buttons for 'Violence', 'No Contact', and 'Information' (which is selected).
- 'Priority: *' with radio buttons for 'High', 'Medium' (which is selected), and 'Low'.
- 'Begin Date: *' with a date picker showing '11/07/2022' and a time dropdown set to 'AM'.
- 'End Date: *' with a date picker showing 'MM/DD/YYYY' and a time dropdown set to 'AM'.
- 'Status: *' with a dropdown menu showing 'Acknowledged'.

 Below these fields is a 'Schedule Setup' section with a checkbox labeled 'Schedule(s)'. At the bottom right, there are 'Save' and 'Cancel' buttons.

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"**.

Add Notification

Notification

Message: * Annual Assessment

Notification Type: * ☐ Violence ☐ No Contact ☒ Information

Priority: * ☒ High ☐ Medium ☐ Low

Begin Date: 05/15/2023 08:00 AM

End Date: 07/14/2023 05:00 AM

Status: * New/Pending

Schedule Setup

Use the fields below to determine when to show the notification. If you check *Show Reminder*, you'll be alerted with a popup window the specified length of time before it starts.

Schedule(s) ☐

Save **Cancel**

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.

Schedule Setup

Use the fields below to determine when to show the notification. If you check *Show Reminder*, you'll be alerted with a popup window the specified length of time before it starts.

Schedule(s) ☒

Time: 05/15/2023 09:30 AM to 10:00 AM Duration: 30 minutes

+

Show Reminder: ☒ 0.5 hours

Add Notification

Notification

Information

Priority: * ☒ High ☐ Medium ☐ Low

Begin Date: 05/15/2023 10:30 AM

End Date: 07/14/2023 11:00 AM

Status: * New/Pending

Schedule Setup

Use the fields below to determine when to show the notification. If you check *Show Reminder*, you'll be alerted with a popup window the specified length of time before it starts.

Schedule(s) ☒

Time: 05/15/2023 10:30 AM to 11:00 AM Duration: 30 minutes

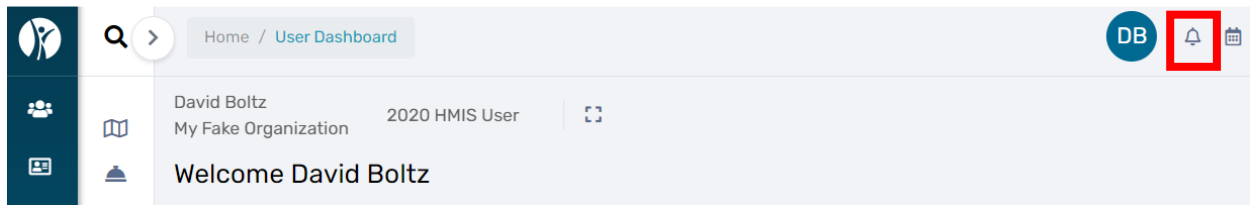
+

Show Reminder: ☒ 0.5 hours

Save **Cancel**

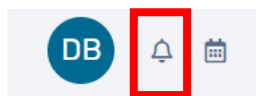
You have successfully added a **“Notification/Alert”** in the client’s HMIS or DV ClientTrack file. The system will begin displaying a reminder alert (window) on the **“Begin Date”** entered for the Notification.

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

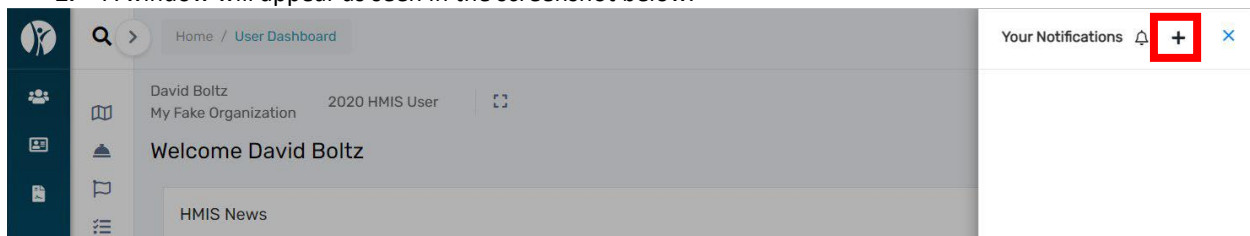


Creating the **“Notification/Alert”** under your user profile will ensure the **“Notification/Alert”** appears as a reminder no matter what Client record you are working in or viewing in the system. Whereas, creating the **“Notification/Alert”** under the Client’s record will only allow the reminder 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.

 A screenshot of the 'Add Notification' form. The form is titled 'Add Notification' and 'Notification'. It contains several fields: 'Message' (with a red arrow pointing to it), 'Notification Type' (with radio buttons for Violence, No Contact, and Information, where Information is selected), 'Priority' (with radio buttons for High, Medium, and Low, where Medium is selected), 'Begin Date' (set to 11/07/2022), 'End Date' (set to MM/DD/YYYY), and 'Status' (set to Acknowledged). There is also a 'Schedule Setup' section at the bottom with a checkbox and instructions. The form has 'Save' and 'Cancel' buttons at the bottom right.

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"**.

Add Notification

Notification

Message: * Annual Assessment

Notification Type: * ☐ Violence ☐ No Contact ☒ Information

Priority: * ☒ High ☐ Medium ☐ Low

Begin Date: 05/15/2023 08:00 AM

End Date: 07/14/2023 05:00 AM

Status: * New/Pending

Schedule Setup

Use the fields below to determine when to show the notification. If you check *Show Reminder*, you'll be alerted with a popup window the specified length of time before it starts.

Schedule(s) ☐



Save Cancel

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.


Schedule Setup

Use the fields below to determine when to show the notification. If you check *Show Reminder*, you'll be alerted with a popup window the specified length of time before it starts.

Schedule(s) ☒

Time: 05/15/2023  09:30 AM to 10:00 AM Duration: 30 minutes 

+

Show Reminder: ☒ 0.5 hours 

Add Notification

Notification

Information

Priority: ☒ High
☐ Medium
☐ Low

Begin Date: 05/15/2023 10:00 AM



End Date: 07/15/2023 10:00 AM

Status: ☒ New


Schedule Setup

Use the fields below to determine when to show the notification. If you check *Show Reminder*, you'll be alerted with a popup window the specified length of time before it starts.


Schedule(s) ☒

Time: 05/15/2023  10:30 AM to 11:00 AM Duration: 30 minutes 

+

Show Reminder: ☒ 0.5 hours 

5 minutes
 10 minutes
 15 minutes
 30 minutes
 1 hour
 2 hours
 4 hours
 8 hours
 0.5 days
 1 day
 2 days
 3 days
 4 days
 1 week
 2 weeks

 Save Cancel

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.

Search

Client Dashboard

Find Client

Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Profile

Common Client Assessments

Other Assessments

Client Enrollment and Client Services

Marta Merkel 7/28/1989 Social Security Number 456-78-3920 Client ID 1048323

Find Client

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

First Name:

Last Name:

Middle Name:

Full Name (Last, First):

Social Security Number: --

Birth Date: MM/DD/YYYY

Client ID:

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.

Find Client

criteria. **Social Security Number** and **Birth Date** are the best fields to narrow your search.

First Name:

Last Name:

Middle Name:

Full Name (Last, First):

Social Security Number: --

Birth Date:

Client ID:

1 result found.

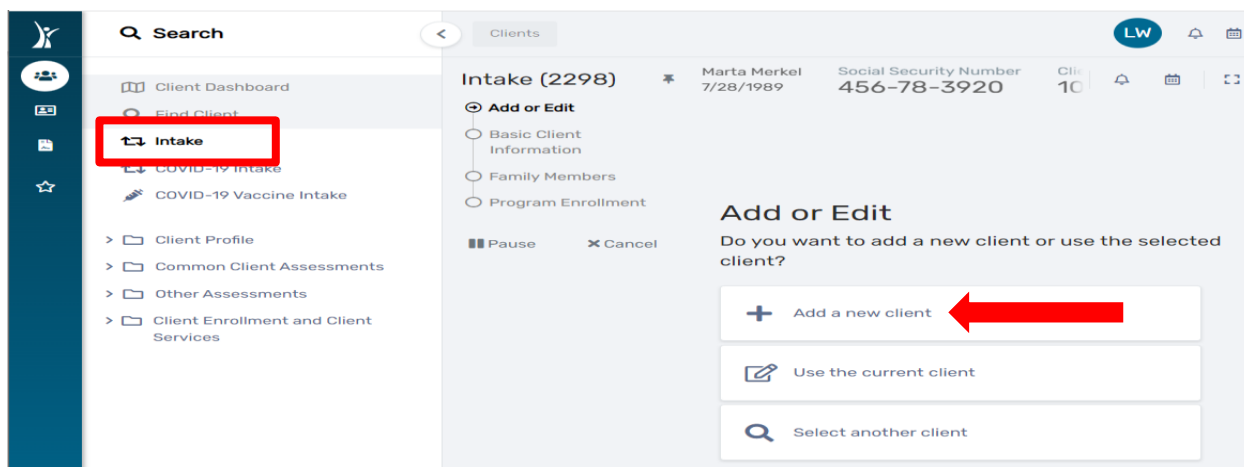
First Name	Last Name	Middle Name	SSN	Birth Date	Client ID
Marta	Merkel		XXX-XX-3920	07/28/1989	1048323

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.

The screenshot shows the 'Client Information' form. The 'Search Existing Clients' section is highlighted with a red box. It contains instructions on how to search for existing clients and a list of instructions. Below the instructions, there are input fields for 'First Name', 'Last Name', 'Social Security Number', and 'Birth Date'. The 'Next' button is also highlighted with a red box.

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.

Shining Star 7/5/2000 Social Security Number 555-55-5555 Client ID --

Client Information

Basic Client Information

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

First Name: * Shining
 Last Name: * Star
 Middle Name:
 Suffix:
 Name Quality: * Full name reported
 Social Security Number: 555 55 5555

Basic Client Demographics

Birth Date: * 07/05/2000
 Client Age: 22
 Date of Birth Quality: * ☒ Full DOB Reported
☐ Approximate or Partial DOB Reported
☐ Client doesn't know
☐ Client refused
☐ Data not collected
 Ethnicity: * Non-Hispanic/Non-Latin(a)(o)(x)
 Race: * ☒ American Indian, Alaska Native, or Indigenous
☒ Asian or Asian American
☒ Black, African American, or African
☒ Native Hawaiian or Pacific Islander
☐ White

Gender: * ☒ Female
☐ Male
☐ A gender other than singularly female or male (e.g., non-binary, genderfluid, agender, culturally specific gender)
☐ Transgender
☐ Questioning
 Pregnancy Status: No
 Veteran Status: * No

Contact Information

Address:
 Address 2:
 City, State, Zip Code: City County County State Zip Code
 Email:
 Home Phone:
 Cell Phone:
 Work Phone:
 Msg Phone:

Family Information

Use this section to collect data about a client's family. The Family search field allows you to search for and select an existing family account. This is appropriate when adding a family member to an existing family.

Family:
 Relationship to Head of Household: * Self

« Previous **Finish**

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.

Intake (2298) | Shining Star | 7/5/2000 | Social Security Number: 555-55-5555 | Client ID: 1048340

Family Members

The selected client's family members are displayed below. You may search for existing clients to add to this family or add new database and associate them with this family.

It's important to note that family members are the people who the client is related to. Family isn't always the same as a client. According to HUD "[a] household is a single individual or a group of persons who apply together to a continuum project for as live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)." (HUD, 2011, p. 10, Manual)

This workflow will allow you to enroll all family members or select which family members you want to enroll.

1 result found (+2).

<input type="checkbox"/>	First Name*	Middle Name	Last Name*	Suffix	Name Quality*
<input checked="" type="checkbox"/>	Shining		Star		Full name reported
<input checked="" type="checkbox"/>	Little		Dipper		Full name reported
<input type="checkbox"/>					-- SELECT --

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.

Search

Find Client

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

First Name:

Last Name:

Middle Name:

Full Name (Last, First):

Social Security Number: - -

Birth Date:

Client ID:

Search

No records found.

First Name	Last Name	Middle Name	SSN	Birth Date	Client ID
------------	-----------	-------------	-----	------------	-----------

Cancel

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.

Shining Star

7/5/2000

Social Security Number

555-55-5555

Client ID

1048340

HUD Program Enrollment

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

The Project Start Date is:

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

Project: *

-- SELECT --

Project: *

My Fake Organization ES (ES-R8)

Household

2

Save

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

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

HMIS UNIVERSAL DATA ASSESSMENT FOR INTAKE WORKFLOW

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

Shining Star 7/5/2000 Social Security Number 555-55-5555 Client ID 1048340

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links

Default Client's Last Assessment

Assessment Date: * 11/21/2022

Age at Assessment: 22

Assessment Type: * Entry

Assessor: * Lori Wood

Program: My Fake Organization ES (ES-R8)

Disabling Condition: * Yes

Client Location

Select or enter the CoC code assigned to the geographic area where the head of household is staying at the time of project entry. Client location will be defaulted to the program's CoC within a workflow.

Client Location: * IN-502 - Indiana Balance of State

Shining Star 7/5/2000 Social Security Number 555-55-5555 Client ID 1048340

Universal Data Assessment

Living Situation

Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.

Prior Living Situation: * Place not meant for habitation

Length of stay in prior living situation: * 90 days or more, but less than one year

Approximate date homelessness started: * 07/11/2022

Regardless of where they stayed last night—Number of times the client has been * Four or more times
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 * More than 12 months
years :

Shining Star 7/5/2000 Social Security Number 555-55-5555 Client ID 1048340

Universal Data Assessment

Health Insurance

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

Default Last Insurance Status

Covered by Health Insurance: * Yes

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

Save

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."**

1 Branch and Discharge Status

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

Branch of the Military:

Discharge Status:

Military Service Dates

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

Service Entry Date: Service Exit Date:

Please Select Theatre(s) of Operation(s):

✓	Theatre of Operations	Status
<input checked="" type="checkbox"/>	Theatre of Operations: Korean War	No
<input checked="" type="checkbox"/>	Theatre of Operations: Other Peace-keeping Operations or Military Interventions (such as Lebanon, Panama, Somalia, Bosnia, Kosovo)	No
<input checked="" type="checkbox"/>	Theatre of Operations: Iraq (Operation New Dawn)	No
<input checked="" type="checkbox"/>	Theatre of Operations: Iraq (Operation Iraqi Freedom)	Yes
<input checked="" type="checkbox"/>	Theatre of Operations: Afghanistan (Operation Enduring Freedom)	No
<input checked="" type="checkbox"/>	Theatre of Operations: Persian Gulf War (Operation Desert Storm)	No
<input checked="" type="checkbox"/>	Theatre of Operations: Vietnam War	No
<input checked="" type="checkbox"/>	Theatre of Operations: World War II	No

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)

Shining Star 7/5/2000 Social Security Number 555-55-5555 Client ID 1048340

Barriers

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

Assessment Active

Identified Date:

Screen:

Disabling Condition:

Barrier List

Barrier	Help	Barrier Present?	Condition is Indefinite	Explanation	Previous Barrier Details
<input checked="" type="checkbox"/> Alcohol Use Disorder	?	No			
<input checked="" type="checkbox"/> Developmental Disability	?	No			
<input checked="" type="checkbox"/> Drug Use Disorder	?	No			
<input checked="" type="checkbox"/> HIV/AIDS	?	No			
<input checked="" type="checkbox"/> Mental Health	?	Yes	Yes		
<input checked="" type="checkbox"/> Physical Disability	?	No			
<input checked="" type="checkbox"/> Chronic Health Condition	?	Yes	Yes	Diabetes	

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

Shining Star 7/5/2000 Social Security Number 555-55-5555 Client ID 1048340

Domestic Violence Assessment

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

Default Client's Last Assessment

Assessment Active

Assessment Date: * 11/21/2022

Domestic Violence Experience: *

- ☐ Yes
- ☒ No
- ☐ Client Doesn't Know
- ☐ Client Refused
- ☐ Data Not Collected

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.**

Shining Star 7/5/2000 Social Security Number 555-55-5555 Client ID 1048340

Income and Sources, Non-Cash Benefits

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

The following instructions are quoted from the HMIS Data Manual:

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

Default Last Assessment

Assessment Active

Assessment Date: * 11/21/2022

Income from Any Source: * Yes

Non-Cash Benefits from Any Source: * Yes

Expenses: -- SELECT --

Shining Star 7/5/2000 Social Security Number 555-55-5555 Client ID 1048340

Income and Sources, Non-Cash Benefits

Income

<input type="checkbox"/>	Type	Description	Monthly Amount
<input type="checkbox"/>	Earned Income		
<input type="checkbox"/>	Private Disability Insurance		
<input type="checkbox"/>	Unemployment Insurance		
<input type="checkbox"/>	Worker's Compensation		
<input type="checkbox"/>	Pension from a former job		
<input checked="" type="checkbox"/>	Supplemental Security Income		1200.00
<input type="checkbox"/>	Social Security Disability Income		
<input type="checkbox"/>	Retirement (Social Security)		
<input type="checkbox"/>	Alimony		
<input type="checkbox"/>	Veteran's Pension		
<input type="checkbox"/>	Veteran's Disability Payment		
<input type="checkbox"/>	TANF		
<input type="checkbox"/>	Child Support		
<input type="checkbox"/>	Other Income		

Grand Total Monthly Income: \$1,200.00

Definitions of Sources of Income

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

Non-Cash Benefits

Type ^{1†}	Description	Monthly Amount
<input type="checkbox"/> Food Stamps/Money for food on benefits card	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants, and Children	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> TANF Child Care Services	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> TANF Transportation Services	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Other TANF-funded Services	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Other Source	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Section 8 Public Housing or Other Rental Assistance (PSH) ¹		
<input type="checkbox"/> Temporary rental assistance (RRH) ¹		
¹ Deprecated in 2017 (HMIS v6.1)		Count/Total Monthly Income: 0 \$0.00

[Save and Close](#)

Definitions of Non-Cash Benefits

- **Food Stamps/Money for Food on Benefits Card** – Monthly payments issued by the government to persons with low income that can be redeemed for food at stores.
- **Special Supplemental Nutrition Program for Women, Infants and Children (WIC)** – A program geared toward supplying nutritional food for at risk pregnant women and their families.
- **TANF Child Care Services** – Childcare funding assistance
- **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.

Little Dipper 10/21/2019 Social Security Number 222-22-2222 Client ID 1048341

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links

[Default Client's Last Assessment](#)

Assessment Date: 11/21/2022

Age at Assessment: 3

Assessment Type: Entry

Assessor: Lori Wood

Program: My Fake Organization ES (ES-RB)

Disabling Condition: -- SELECT --

Health Insurance

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

[Default Last Insurance Status](#)

Covered by Health Insurance: -- SELECT --

Type	Status	Reason No	Other Coverage
Private	-- SELECT --	-- SELECT --	
Private - Employer	-- SELECT --	-- SELECT --	
Private - Individual	-- SELECT --	-- SELECT --	
Medicare	-- SELECT --	-- SELECT --	
Medicaid	-- SELECT --	-- SELECT --	

[Save](#)

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.”**

Little Dipper 10/21/2019 Social Security Number 222-22-2222 Client ID 1048341

Barriers

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

Assessment Active

Identified Date: 11/21/2022

Screen: HMIS Barriers

Disabling Condition: No

<input type="checkbox"/>	Barrier	Help	Barrier Present?	Condition is Indefinite	Explanation	Previous Barrier Details
<input checked="" type="checkbox"/>	Alcohol Use Disorder	?	No			<input type="checkbox"/> ↻
<input checked="" type="checkbox"/>	Developmental Disability	?	No			<input type="checkbox"/> ↻
<input checked="" type="checkbox"/>	Drug Use Disorder	?	No			<input type="checkbox"/> ↻
<input checked="" type="checkbox"/>	HIV/AIDS	?	No			<input type="checkbox"/> ↻
<input checked="" type="checkbox"/>	Mental Health	?	No			<input type="checkbox"/> ↻
<input checked="" type="checkbox"/>	Physical Disability	?	No			<input type="checkbox"/> ↻
<input checked="" type="checkbox"/>	Chronic Health Condition		No			<input type="checkbox"/> ↻

Save 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.

Shining Star 7/5/2000 Social Security Number 555-55-5555 Client ID 1048340

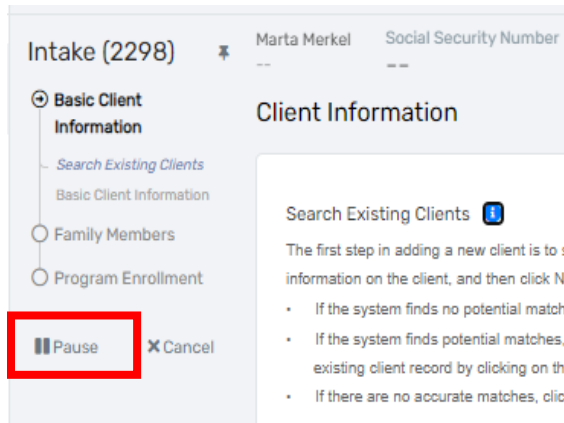
You're done!
All required steps have been completed.


☒ Finish
Close the workflow

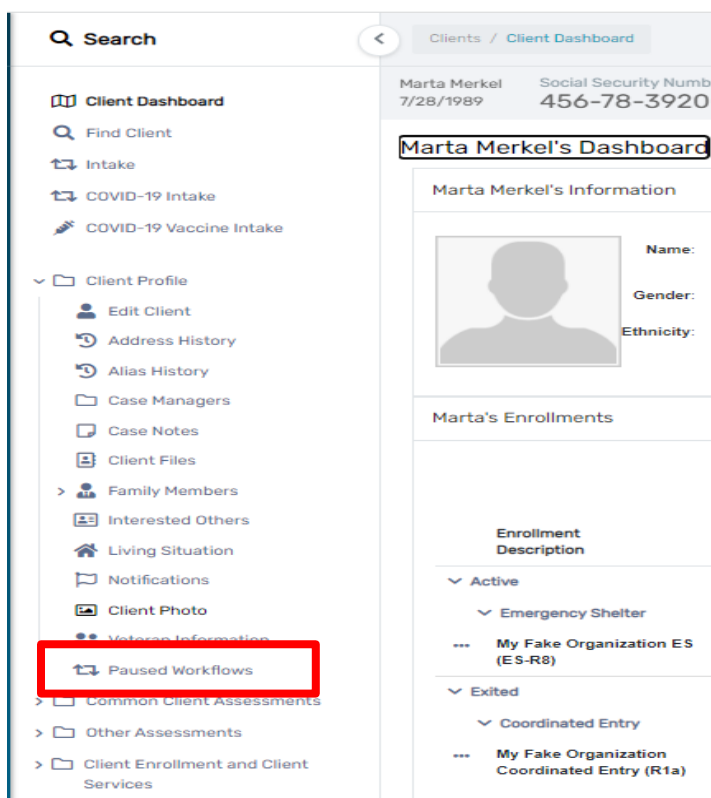
If you need to go back and change information entered in the workflow prior to finishing, you can click on the specific section of the workflow you wish to return to in the workflow window that appears on the left-hand side of the client record (outlined in red above). Clicking on the link beside the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

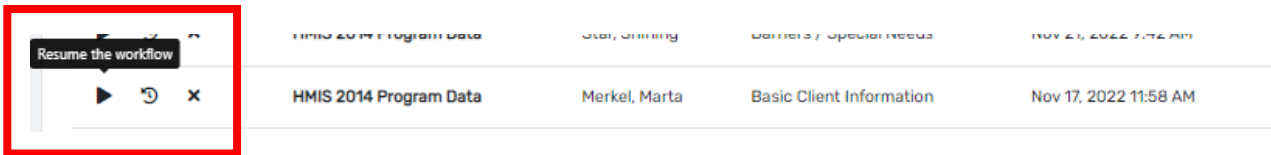
PAUSING A WORKFLOW

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.

Red Mercury
8/8/1988

Social Security Number
367-28-1928

Client ID
1048328

HUD Program Enrollment

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

The Project Start Date is:

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

Project: * My Fake Organization CoC RRH (RRH-RB)

Household

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

<input type="checkbox"/>	Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household*	Housing Move-in Date
<input checked="" type="checkbox"/>	Mercury, Red	Male	34	01/18/2022	Lori Wood	Self	04/28/2022

1

Save No Changes

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.

Brave Soul 11/25/1975 Social Security Number 333-33-3333 Client ID 1048342

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links

Master Assessment Active. [Change Assessment Date](#)

[Default Client's Last Assessment](#)

Universal Data Assessment * 11/22/2022

Information Date:

Age while in project: 46

Assessment Type: Entry

Disabling Condition: * Yes

Household Income as a Percentage of AMI: * 30% to 50%

VAMC Station Number: * (583) Indianapolis, IN

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

Brave Soul 11/25/1975 Social Security Number 333-33-3333 Client ID 1048342

Veteran Information

Branch and Discharge Status

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

Branch of the Military: * Army

Discharge Status: * Honorable

Military Service Dates

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

Service Entry Date: * 11/22/1999

Service Exit Date: * 11/22/2011

☐ Please Select Theatre(s) of Operation(s)

Theatre of Operations	Status *
<input checked="" type="checkbox"/> Theatre of Operations: Korean War	No
<input checked="" type="checkbox"/> Theatre of Operations: Other Peace-keeping Operations or Military Interventions (such as Lebanon, Panama, Somalia, Bosnia, Kosovo)	No
<input checked="" type="checkbox"/> Theatre of Operations: Iraq (Operation New Dawn)	Yes
<input checked="" type="checkbox"/> Theatre of Operations: Iraq (Operation Iraqi Freedom)	No
<input checked="" type="checkbox"/> Theatre of Operations: Afghanistan (Operation Enduring Freedom)	Yes
<input checked="" type="checkbox"/> Theatre of Operations: Persian Gulf War (Operation Desert Storm)	No
<input checked="" type="checkbox"/> Theatre of Operations: Vietnam War	No
<input checked="" type="checkbox"/> Theatre of Operations: World War II	No

[Save](#)

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

Brave Soul 11/25/1975 Social Security Number 333-33-3333 Client ID 1048342

HP Targeting Criteria

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

SSVF Homeless Prevention Assessment

Assessment Date: 11/22/2022 Assessment Active

Is Homelessness Prevention targeting screener required? ☒ Yes ☐ No

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

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

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

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

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

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

Rental Evictions within the past 7 years (any adult): ☒ No prior rental evictions

Save No Changes

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

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

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

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

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

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

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

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

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

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

HP applicant total points: 39

Grantee targeting threshold score:

Save No Changes

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.

New Day 6/14/1998 Social Security Number 234-78-4637 Client ID 1048314

HUD Program Enrollment

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

The Project Start Date is:

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

Project: * My Fake Organization PATH (SO-RB)

Household

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

Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household*	Date of Engagement	Date PATH Status Determined	Client became enrolled in PATH	Reason not enrolled in PATH
Day, New	Female	24	03/29/2022	Lori Wood	Self	MM/DD/YYYY	MM/DD/YYYY	-- SELECT --	

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

New Day 6/14/1998 Social Security Number 234-78-4637 Client ID 1048314

SOAR Connection

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

Default Client's Last Assessment

Assessment Active

Assessment Date: * 03/29/2022



Connection with SOAR: * No


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.

New Day 6/14/1998 Social Security Number 234-78-4637 Client ID 1048314


Current Living Situation


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

Information Date: * 03/29/2022  

Enrollment: * 03/29/2022 - My Fake Organization PATH (SO-R8) 


Current Living Situation Information


Current Living Situation: * Place not meant for habitation 

Location Detail: 


Record Contact: ☒


Contact Service Information


Contact Service: * PATH - Case Management 


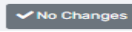
Location: My Fake Organization 

Use Geolocation: ☐

Comments: 





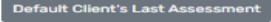
HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS (HOPWA) ENROLLMENT AT INTAKE

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


Happy Friday 8/8/1988 Social Security Number 888-88-8888 Client ID 1048343


HOPWA Medical Assistance Assessment







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

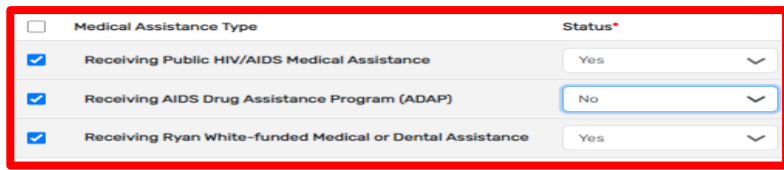


Assessment Active

Assessment Date: * 11/22/2022 



<input type="checkbox"/> Medical Assistance Type	Status*	Reason No (if applicable)
<input checked="" type="checkbox"/> Receiving Public HIV/AIDS Medical Assistance	Yes 	
<input checked="" type="checkbox"/> Receiving AIDS Drug Assistance Program (ADAP)	No 	-- SELECT -- 
<input checked="" type="checkbox"/> Receiving Ryan White-funded Medical or Dental Assistance	Yes 	



Happy Friday
8/8/1988

Social Security Number
888-88-8888

Client ID
1048343

T-cell/Viral Measurements

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

Assessment Active

Assessment Date: 11/22/2022

T-cell (CD4) Count Available: Yes

Viral Load Available: Available

Date	Measurement	Value	How was the data obtained
11/22/2022	Viral Load	737925	--SELECT--
11/22/2022	T-cell Count	988	--SELECT--

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**

Happy Friday
8/8/1988

Social Security Number
888-88-8888

Client ID
1048343

Family Financial Evaluation

Below is a list of all financial income assessments that belong to clients that are current members of the family. Select the desired income assessments to include in the Family Financial Evaluation. This functionality uses the zip code assigned to the family during intake and will need to be completed prior to adding this assessment.

Evaluation Date: 11/22/2022

Date	Type	Monthly Income	Annualized
Friday, Happy			
<input type="radio"/> Do not use any of this client's assessments.			
11/22/2022	Entry	\$1,200.00	\$14,400.00
Total:		\$1,200.00	\$14,400.00

Form Load Optimization

The Financial Evaluation form is optimized when an address has been recorded for the Client or Family Member. Form functionality uses the Zip Code assigned to the Family.

Area: Hendricks County, IN

Family Size: 1

Percentage of Area Median Income: An income of \$14,400.00 is extremely low income for a family of 1.

Family Size	Extremely Low	Very Low	Low
1	19,200	32,000	51,150
2	21,950	36,550	58,450
3	24,700	41,100	65,750
4	27,750	45,650	73,050
5	32,470	49,350	78,900
6	37,190	53,000	84,750
7	41,910	56,650	90,600
8	46,630	60,300	96,450

Percentage of Federal Poverty Level: 105.96 %

Save

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

Future Youth 4/4/2006 Social Security Number 444-44-4444 Client ID 1048344

RHY BCP Status Assessment

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

RHY - BCP - Status

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

Date Status Determined: * 11/23/2022

Youth Eligible for RHY Services: * Yes

Runaway Youth: * Yes

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

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

Future Youth 4/4/2006 Social Security Number 444-44-4444 Client ID 1048344

HMIS 2017 Employment Assessment

Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week prior to assessment, and select the tenure of the employment position. If the client is not employed, indicate if the client is looking for work.

Default Client's Last Assessment

Assessment Active

Assessment Date: * 11/23/2022

Employed? * No

Why Not Employed : * Looking for work

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

Future Youth 4/4/2006 Social Security Number 444-44-4444 Client ID 1048344

Child Education Assessment

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

Default Client's Last Assessment

Assessment Active

Assessment Date: * 11/23/2022

Highest Grade Completed: * 10th Grade

School Status: * Dropped out

Comments:

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

Future Youth 4/4/2006 Social Security Number 444-44-4444 Client ID 1048344

Health Assessment

Select the appropriate general health status. If applicable, you will need to select the appropriate pregnancy status. If the client is pregnant, you will need to record the due date.

Default Client's Last Assessment

Assessment Active

Assessment Date: * 11/23/2022

General Health Status: * Fair

Dental Health Status: * Fair

Mental Health Status: * Poor

Pregnancy Status: * No

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.

Future Youth 4/4/2006 Social Security Number 444-44-4444 Client ID 1048344

RHY Entry Assessment

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

Assessment Active

Assessment Date: * 11/23/2022

Sexual Orientation: * Questioning / Unsure

Referral Source: * Self-Referral

Critical Issue	Status*
<input checked="" type="checkbox"/> Unemployment - Family member	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input checked="" type="checkbox"/> Mental Health Disorder - Family member	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="checkbox"/> Physical Disability - Family member	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="checkbox"/> Alcohol or Substance Use Disorder - Family member	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input checked="" type="checkbox"/> Insufficient Income to support youth - Family member	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input checked="" type="checkbox"/> Incarcerated Parent of Youth	<input type="radio"/> Yes <input checked="" type="radio"/> No

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.

Future Youth 4/4/2006 Social Security Number 444-44-4444 Client ID 1048344

System Use

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

Assessment Active

Assessment Date 11/23/2022

System	Formerly a Ward Of:	Number of Years	Number of Months (1-11)
<input checked="" type="checkbox"/> Child Welfare/Foster Care Agency	Yes	1 to 2 years	
<input checked="" type="checkbox"/> Juvenile Justice System	Yes	Less than one year	

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.

Search

Clients / ClientTrack Form

Shining Star 7/5/2000 Social Security Number 555-55-5555 Client ID 1048340

Client Services

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

+ Add New Service **Quick Services**

No records found.

Date	Service	Units	\$ Total	Organization
		0.00	\$0.00	

Client Dashboard

Find Client

Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Profile

Common Client Assessments

Other Assessments

Client Enrollment and Client Services

Enrollments

Quick Services

Referrals

Services

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.

Shining Star 7/5/2000 Social Security Number 555-55-5555 Client ID 1048340

Client Case Notes

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

+ Add New Case Note Print Selected

Date	Regarding	User	Organization	Print
No records found.				

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.**

Shining Star 7/5/2000 Social Security Number 555-55-5555 Client ID 1048340

Case Note

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

Entry Date: 11/23/2022

User: Lori Wood

Regarding: Completed Intake

Note Type: -- SELECT --

Template: Option not in the list


Case Note

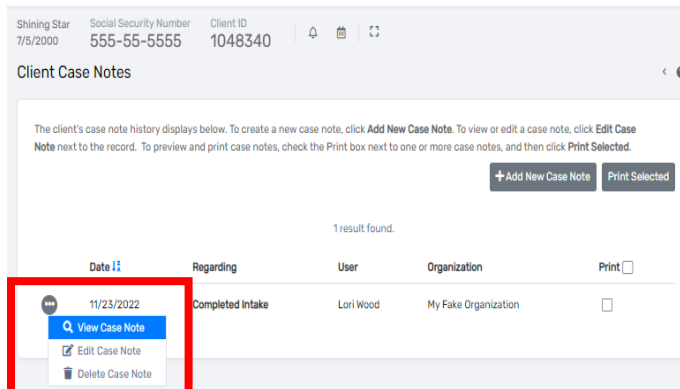
Client Name: Shining Star
Met w/ci and completed intake.

Design HTML Preview

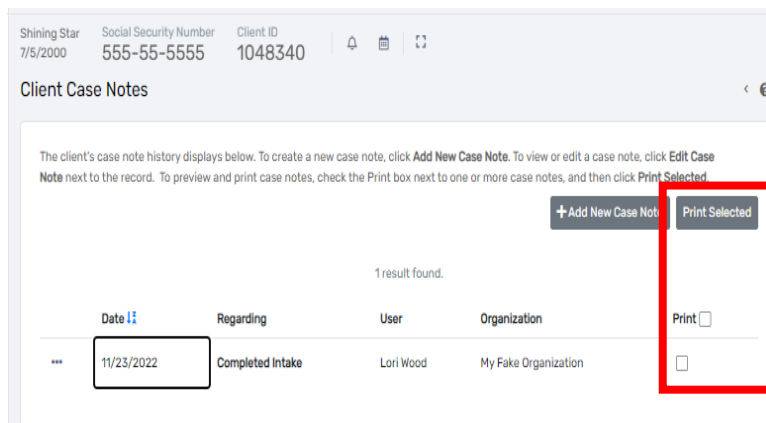
Read Only: ☐

Save Cancel

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.

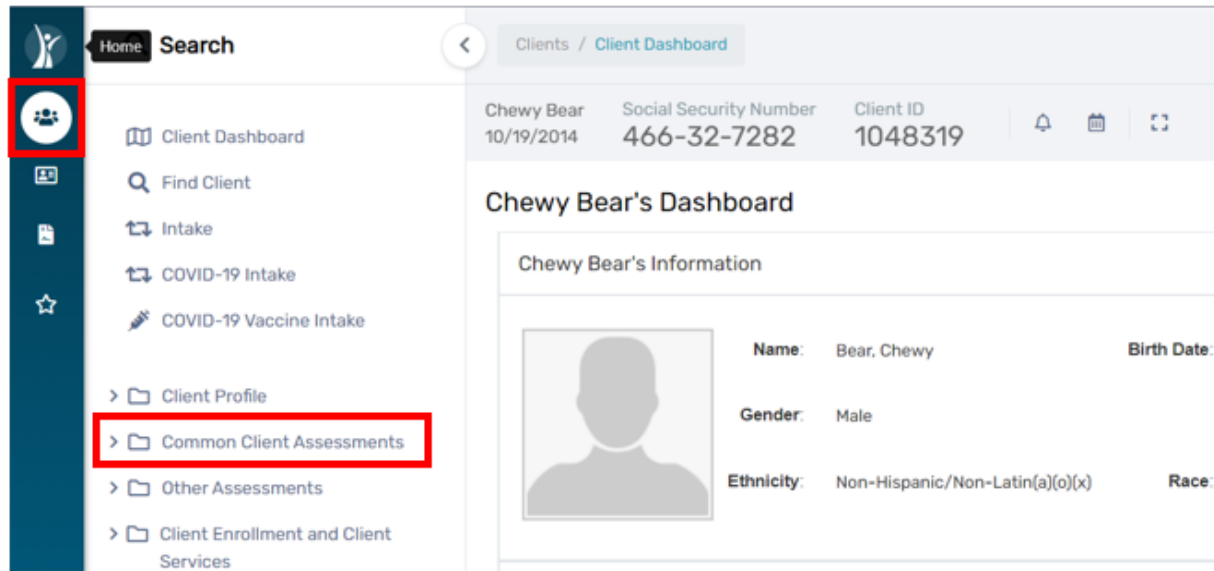
UPDATE/ANNUAL ASSESSMENT

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.”

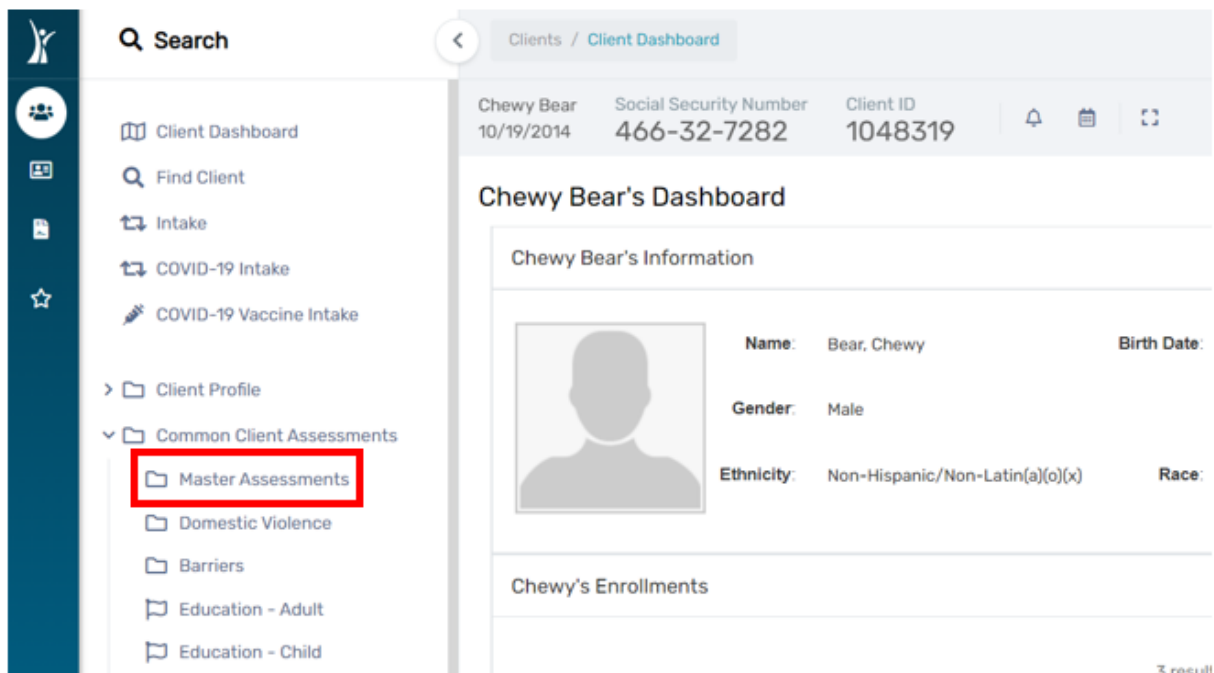
First, you need to know that, according to the [2022 HMIS Data Standards](#) on page 15, “– *Data elements required for collection at annual assessment must be entered with an Information Date of no more than 30 days before or after the anniversary of the head of household’s Project Start Date, regardless 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.

Search

Clients / ClientTrack Form

Chewy Bear 10/19/2014 Social Security Number 466-32-7282 Client ID 1048319

Master Assessments

Below is a list of Master Assessments that have been created for this client. Please use the HMIS workflows to add or e

6 results found.

	Date	Program	Type	Assessor
...	11/23/2022	My Fake Organization CoC RRH (RRH-R8)	Annual	Daniella Jordan Gonzales
...	11/06/2022	My Fake Organization Coordinated Entry (R1a)	Entry	Daniella Jordan Gonzales
...	11/04/2022	My Fake Organization CoC RRH (RRH-R8)	Exit	Daniella Jordan Gonzales
...	09/06/2022	My Fake Organization Coordinated Entry (R1a)	Exit	Lori Wood

4. Choose “View Related Enrollment or Applications” from the drop-down list.

Search

Clients / ClientTrack Form

Chewy Bear 10/19/2014 Social Security Number 466-32-7282 Client ID 1048319

Master Assessments

Below is a list of Master Assessments that have been created for this client. Please use the HMIS workflow:

6 results found.

	Date	Program	Type	Assessor
...	11/23/2022	My Fake Organization CoC RRH (RRH-R8)	Annual	Daniella Jordan
View Related Assessments				
View Related Enrollment or Applications				
Delete Assessment				
		My Fake Organization Coordinated Entry (R1a)	Entry	Daniella Jordan
		My Fake Organization CoC RRH (RRH-R8)	Exit	Daniella Jordan

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.

Search

Clients / 11/23/2022 Annual / ClientTrack Form

Chewy Bear 10/19/2014 Social Security Number 466-32-7282 Client ID 1048319

Assessment Links

Below are the records under which this assessment has been linked. The Type of record and Assessment link type can be us other records.

1 result found.

Assessment Type	Record Type	Link Description
Annual	Enrollment	My Fake Organization CoC RRH (RRH-R8)

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.

The screenshot displays the 'Assessment For Enrollment (1263)' form for a client named 'Gummy Bear'. The form includes fields for 'Social Security Number' (312-98-0478) and 'Client ID' (1048318). A red box highlights a warning message: 'Please address the following: The assessment data is out side the 60 day window of the annual assessment. Gummy Bear's Anniversary date is 11/23. Setting an anniversary date outside the 60 day window may cause data quality and reporting errors.' Below this, the 'Assessment Date' is set to 11/23/2022, also highlighted with a red box. Other fields include 'Age at Assessment' (22), 'Assessment Type' (Annual), 'Assessor' (Daniella Jordan Gonzalez), and 'Program' (My Fake Organization CoC RHH (RHH-RB)).

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"**.

Enrollment Description	Case Members	Project Start Date
Active		
PH - Rapid Re-Housing		
My Fake Organization CoC RRH (RRH-R8)	1	11/17/2021
Add Household Member		
View Case Members		
Exit the Enrollment		
Edit Enrollment	1	06/14/2022
Edit Project Entry Workflow		
Review Entry Assessments		
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"**

Assessment For Enrollment (1263)

Enrollment

Polo, Marco

Type of Assessment

(not complete)

Assessments

Pause Cancel

Type of Assessment

New During Program Enrollment/Update Assessment

New Annual Assessment

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

Marco Polo 8/25/1999 Social Security Number ???-??-4428 Client ID 1048322

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links

Default Client's Last Assessment

Assessment Date: 11/28/2022

Age at Assessment: 23

Assessment Type: Annual

Assessor: Lori Wood

Program: My Fake Organization CoC RRH (RRH-R8)

Living Situation

Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.

Health Insurance

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

Default Last Insurance Status

Covered by Health Insurance: No

Type	Status	Reason No	Other Coverage
Private	No	-- SELECT --	
Public - Federal	No	-- SELECT --	

Save

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

Marco Polo 8/25/1999 Social Security Number ???-??-4428 Client ID 1048322

Income and Sources, Non-Cash Benefits

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

The following instructions are quoted from the HMIS Data Manual:

- When a client has income, but does not know the exact amount, a "Yes" response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.
- Income received by or on behalf of a minor child should be recorded as part of household income under the Head of Household, unless the federal funder in the HMIS Program Specific Manual instructs otherwise. Income should be recorded at the client-level for heads of household and adult household members. Projects collecting data through client interviews should ask clients whether they receive income from each of the sources listed rather than asking them to state the sources of income they receive.
- Income data should be recorded only for sources of income that are current as of the information date (i.e. have not been specifically terminated). As an example, if a client's employment has been terminated and the client has not yet secured additional employment, the response for Earned income would be "Yes." As a further example, if a client's most recent paycheck was 2 weeks ago from a job in which the client was working full time for \$15.00/hour, but the client is currently working 20 hours per week for \$12.00 an hour, record the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour).

Default Last Assessment
Assessment Active

Assessment Date: 11/26/2022

Income from Any Source: No

Non-Cash Benefits from Any Source: No

Expenses: -- SELECT --

Save and Close

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

Assessment For Enrollment (1263)

Marco Polo 8/25/1999 Social Security Number ???-??-4428 Client ID 1048322

Enrollment

Polo, Marco

Pause Cancel

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

Finish
Close the workflow

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

Client Dashboard
Find Client
Intake
COVID-19 Intake
COVID-19 Vaccine Intake

Common Client Assessments
Master Assessments

Marco Polo 8/25/1999 Social Security Number ???-??-4428

Marco Polo's Dashboard

Marco Polo's Information

Marco's Enrollments

Enrollment Description

Active
PH - Rapid Re-Housing
My Fake Organization CoC RR

Marco Polo 8/25/1999 Social Security Number ???-??-4428 Client ID 1048322

Master Assessments

Below is a list of Master Assessments that have been created for this client. Please use the HMIS workflows to add or edit assessments.

4 results found.

Date	Program	Type	Assessor	Comments	AssessID
11/28/2022	My Fake Organization CoC RRH (RRH-R8)	Annual	Lori Wood		1971945
11/23/2022	My Fake Organization ES (ES-R8)	Exit	Lori Wood		1971943
06/14/2022	My Fake Organization ES (ES-R8)	Entry	Lori Wood		1971892
11/17/2021	My Fake Organization CoC RRH (RRH-R8)	Entry	Lori Wood		1971944

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.

Marco's Enrollments

1 result found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID
Active					
Emergency Shelter					
My Fake	1	06/14/2022			1971892

Add Household Member
 View Case Members
Exit the Enrollment
 Edit Enrollment
 Edit Project Entry Workflow
 Review Entry Assessments
 Update/Annual Assessment

- 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.

HUD Program Exit

Exit Enrollment

Exit Assessments

Pause Cancel

Enrollment Exit

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

Exit Date: * 11/23/2022

Destination: * Rental by client, other ongoing housing subsidy

Exit Reason: * Completed Program

Case Manager Assignment: Lori Wood

End Case Assignment: ☒

Save

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.

Marco Polo 8/25/1999 Social Security Number ???-??-4428 Client ID 1048322

Universal Data Assessment

Complete the information below related to the selected client’s housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links

Default Client’s Last Assessment

Assessment Date: 11/23/2022

Age at Assessment: 23

Assessment Type: Exit

Assessor: Lori Wood

Program: My Fake Organization ES (ES-R8)

Living Situation
Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.

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

Save

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.

Marco Polo 8/25/1999 Social Security Number ???-??-4428 Client ID 1048322

Barriers

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

View Barrier History

Assessment Active

Identified Date: 11/23/2022

Screen: HMIS Barriers

Disabling Condition: Yes

	Barrier ⓘ	Help ⓘ	Barrier Present?	Condition is Indefinite	Explanation	Previous Barrier Details
<input checked="" type="checkbox"/>	Alcohol Use Disorder	ⓘ	Yes	Yes		<input checked="" type="checkbox"/> Previous Barrier ⓘ
<input checked="" type="checkbox"/>	Developmental Disability	ⓘ	No			<input checked="" type="checkbox"/> Previous Barrier ⓘ
<input checked="" type="checkbox"/>	Drug Use Disorder	ⓘ	No			<input checked="" type="checkbox"/> Previous Barrier ⓘ
<input checked="" type="checkbox"/>	HIV/AIDS	ⓘ	No			<input checked="" type="checkbox"/> Previous Barrier ⓘ
<input checked="" type="checkbox"/>	Mental Health	ⓘ	No			<input checked="" type="checkbox"/> Previous Barrier ⓘ

Save **Save & Close**

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.

Marco Polo 8/25/1999 Social Security Number ???-??-4428 Client ID 1048322

Income and Sources, Non-Cash Benefits

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

The following instructions are quoted from the HMIS Data Manual:

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

Default Last Assessment
Assessment Active

Assessment Date: 11/23/2022

Income from Any Source: No

Non-Cash Benefits from Any Source: No

Expenses: -- SELECT --

Save and Close

+ Income and Sources, Non-Cash Benefits

Income

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

Count/Total Monthly Income: 0 \$0.00

Definitions of Sources of Income

- Earned Income** – Employment income

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

Non-Cash Benefits

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

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

[Save and Close](#)

Definitions of Non-Cash Benefits

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

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

HUD Program Exit | Mika Polo | 11/5/2016 | Social Security Number: 246-87-9879 | Client ID: 1048347

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links.

Default Client's Last Assessment

Assessment Date: 11/28/2022
 Age at Assessment: 6
 Assessment Type: Exit
 Assessor: Lori Wood
 Program: My Fake Organization ES (ES-RB)

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

Default Last Insurance Status

Covered by Health Insurance: No

Type	Status	Reason No	Other Coverage
Private	No	-- SELECT --	
Private - Employer	No	-- SELECT --	
Private - Individual	No	-- SELECT --	
Medicare	No	-- SFI FCT --	

Save

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.

Mika Polo | 11/5/2016 | Social Security Number: 246-87-9879 | Client ID: 1048347

Barriers

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

Assessment Active

Identified Date: 11/28/2022
 Screen: HMIS Barriers

Barrier ID	Help	Barrier Present?	Condition is Indefinite	Explanation	Previous Barrier Details
✓ Alcohol Use Disorder	ⓘ	No			<input type="checkbox"/> ↻
✓ Developmental Disability	ⓘ	No			<input type="checkbox"/> ↻
✓ Drug Use Disorder	ⓘ	No			<input type="checkbox"/> ↻
✓ HIV/AIDS	ⓘ	No			<input type="checkbox"/> ↻
✓ Mental Health	ⓘ	No			<input type="checkbox"/> ↻
✓ Physical Disability	ⓘ	No			<input type="checkbox"/> ↻
✓ Chronic Health Condition		No			<input type="checkbox"/> ↻

Save **Save & Close**

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.

HUD Program Exit

Marco Polo 8/25/1999 Social Security Number ???-??-4428 Client ID 1048322

Exit Enrollment

Exit Assessments

Polo, Mika

Pause Cancel

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

Finish
Close the workflow

You will then return to the client dashboard where you can see the project exit dates 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.

Marco Polo's Dashboard

Marco Polo's Information

Name: Polo, Marco Birth Date: 8/25/1999 Age: 23

Gender: Male Veteran: No

Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x) Race: Asian or Asian American, Native Hawaiian or Pacific Islander

Marco's Enrollments

2 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination	Last Assessed
Active								
PH - Rapid Re-Housing								
My Fake Organization CoC RRH (RRH-R8)	1	11/17/2021	11/30/2021		1971944			11/28/2022
Emergency Shelter								
My Fake Organization ES (ES-R8)	2	06/14/2022		11/28/2022	1971892	1971946	Rental by client in a pub...	11/28/2022

Case Manager Assignments

1 result found.

Case Manager	Begin Date	Status	End Date	Enrollment	All Associated Enrollments
Lori Wood	06/14/2022	Inactive	11/23/2022	My Fake Organization ES (ES-R8)	

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.

HUD Program Exit

New Day: 6/14/1998 | Social Security Number: 234-78-4637 | Client ID: 1048314

SOAR Connection

Indicate the Connection with SOAR for the client below

Default Client's Last Assessment: Assessment Active

Information Date: 11/28/2022

Connection with SOAR: Yes

Save

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.

HUD Program Exit

New Day: 6/14/1998 | Social Security Number: 234-78-4637 | Client ID: 1048314

Current Living Situation

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

Information Date: 11/28/2022

Enrollment: 03/29/2022 - 11/28/2022 - My Fake Organization PATH (SO-R8)

Current Living Situation Information

Current Living Situation: Other

Location Detail: RRH Apartment

Record Contact: ☒

Contact Service Information

Contact Service: PATH - Contact

Location: My Fake Organization

Use Geolocation: ☐

Comments:

Save

HOPWA AT EXIT

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

Happy Friday 8/8/1988 Social Security Number 888-88-8888 Client ID 1048343

HOPWA Medical Assistance Assessment

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

Default Client's Last Assessment

Assessment Active

Assessment Date: 11/28/2022

Search

<input type="checkbox"/>	Medical Assistance Type	Status*	Reason No (if applicable)
<input checked="" type="checkbox"/>	Receiving Public HIV/AIDS Medical Assistance	Yes	
<input checked="" type="checkbox"/>	Receiving AIDS Drug Assistance Program (ADAP)	Yes	
<input checked="" type="checkbox"/>	Receiving Ryan White-funded Medical or Dental Assistance	No	-- SELECT --

Save Save & Close

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

Happy Friday 8/8/1988 Social Security Number 888-88-8888 Client ID 1048343

T-cell/Viral Measurements

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

Assessment Active

Assessment Date: 11/28/2022

T-cell (CD4) Count Available: Yes

Viral Load Available: Undetectable

<input checked="" type="checkbox"/>	Date	Measurement	Value	How was the data obtained
<input checked="" type="checkbox"/>		Viral Load		
<input checked="" type="checkbox"/>	11/28/2022	T-cell Count	<input type="text" value="1313"/>	Client Report

Save

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.

Happy Friday 8/8/1988 Social Security Number 888-88-8888 Client ID 1048343

Housing Assessment

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

Assessment Active

Assessment Date: * 11/28/2022

Housing Assessment at Exit: * Moved in with family/friends on a permanent basis

Save

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.

Future Youth 4/4/2006 Social Security Number 444-44-4444 Client ID 1048344

HMIS 2017 Employment Assessment

Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week prior to assessment, and select the tenure of the employment position. If the client is not employed, indicate if the client is looking for work.

Default Client's Last Assessment

Assessment Active

Assessment Date: * 11/28/2022

Employed? * Yes

Type of Employment: * Full-Time

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

Future Youth 4/4/2006 Social Security Number 444-44-4444 Client ID 1048344

Health Assessment

Select the appropriate general health status. If applicable, you will need to select the appropriate pregnancy status. If the client is pregnant, you will need to record the due date.

Default Client's Last Assessment

Assessment Active

Assessment Date: * 11/28/2022

General Health Status: * Good

Dental Health Status: * Good

Mental Health Status: * Good

Pregnancy Status: No

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.

Future Youth 4/4/2006 Social Security Number 444-44-4444 Client ID 1048344

RHY Exit Assessment

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

Assessment Active

Assessment Date: * 11/28/2022

Project Completion Status: * Completed project

Commercial Sexual Exploitation/Sex Trafficking

Ever received anything in exchange for sex (e.g. money, food, drugs, shelter): * Yes

In the last three months: * No

How many times: * 4-7

Ever made/persuaded/forced to have sex in exchange for something: * Yes

In the last three months: * No

Labor Exploitation/Trafficking

Ever afraid to quit/leave work due to threats of violence to yourself, family, or friends: * Yes

Ever promised work where work or payment different than you expected: * Yes

Felt forced, coerced, pressured or tricked into continuing the job: * Yes

In the last 3 months: * No

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

Future Youth
4/4/2006
Social Security Number
444-44-4444
Client ID
1048344

Counseling Assessment

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

Default Client's Last Assessment ?

Assessment Active

Pre-Exit

Assessment Date: * 11/28/2022 📅

Counseling received by client: * Yes ▼

Type(s) of Counseling Received: * ✓ Individual ✕

Family

Group - including peer counseling

Number of sessions received by exit: * 15

Total number of sessions planned in youth's treatment or service plan: 30

Post-Exit

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

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

Future Youth
4/4/2006
Social Security Number
444-44-4444
Client ID
1048344

Safe and Appropriate Exit

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

Default Client's Last Assessment ?

Assessment Active

Assessment Date: * 11/28/2022 📅

Exit destination safe - as determined by client: * Yes ▼

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

Client has permanent positive adult connections outside of project: * Yes ▼

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

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

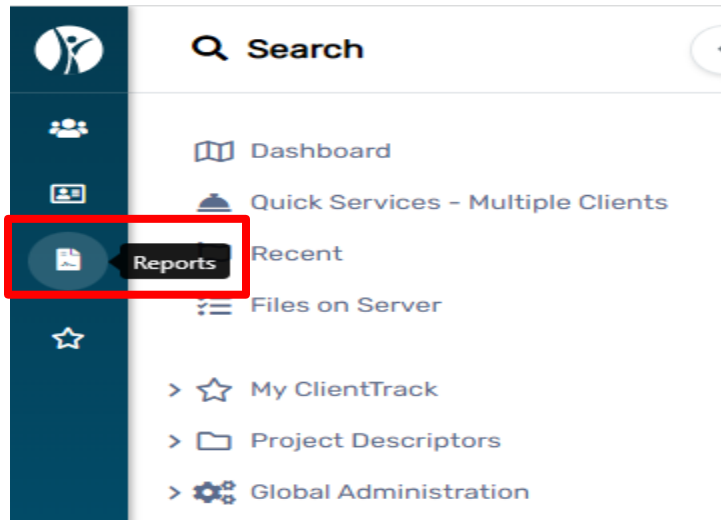
BASIC REPORTS

SERVICE SUMMARY REPORT

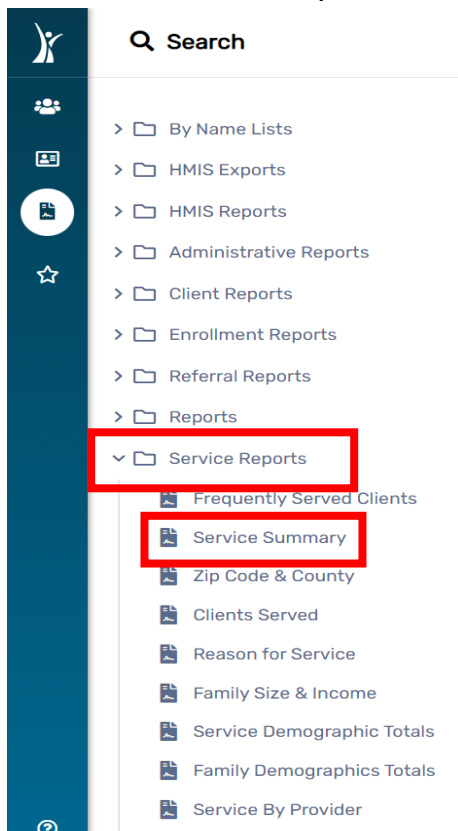
The Service Summary Report is a report of the services your agency has provided for clients enrolled in a specific program. You can run a Service Summary Report a variety of ways to extract specific service information from client records, for example services rendered in the month of December or Case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

Additional Filters

Only Include Services with Direct Enrollment Reference: ☐

Only Include Direct Services: ☐

Include Scheduled Services: ☐

Only Include HIV Cases: ☐

Only Include AIDS Cases: ☐

Sort Settings

Sort By: ☐ Name ☒ Date

Grouping

Group Results by Organization: ☐

Do Not Provide Grand Totals: ☐

Hide Filter Criteria: ☐

Report Schedule Report Cancel

- **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 Report

1 of 1

Excel
Excel Data
PDF
Word

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

ClientTrack™ Reports

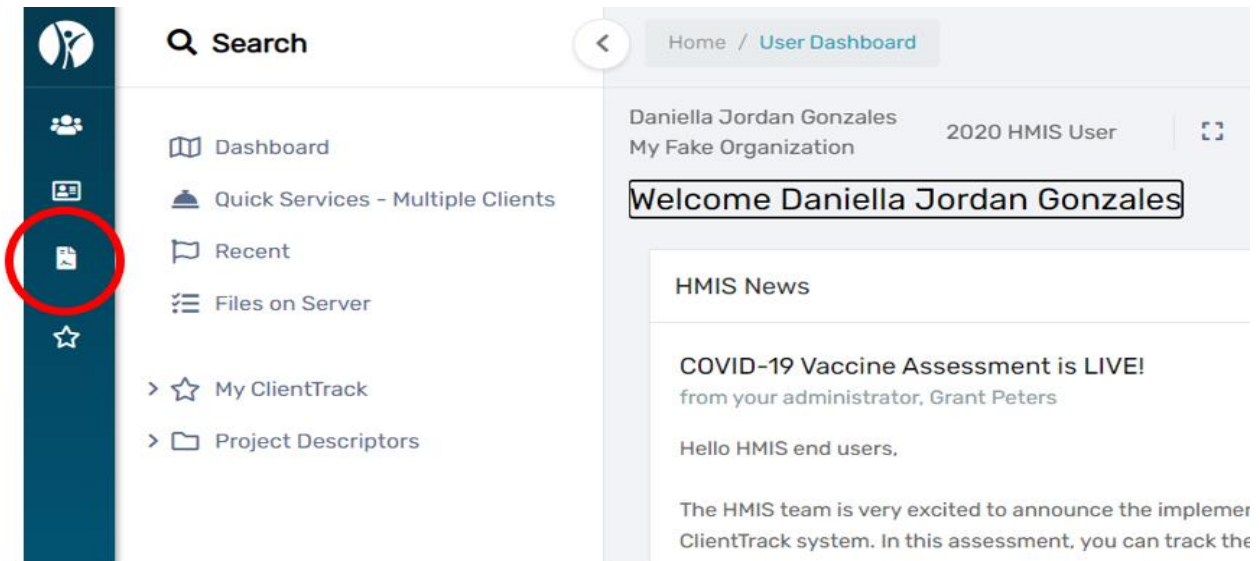
Page 1 of 1

Lori Wood
11/28/2022 1:38 PM

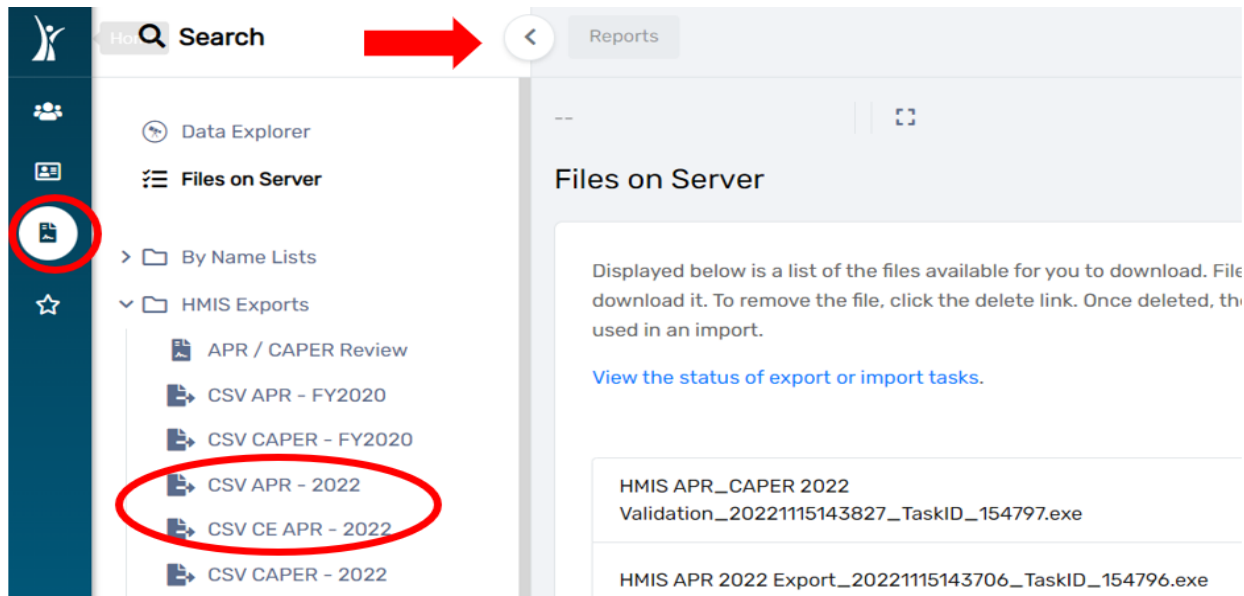
ANNUAL PERFORMANCE REPORT (APR) AND CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT (CAPER)

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

- 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.

Search

Reports / ClientTrack Form

CSV APR - HMIS 2022 Standard

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.

Date Range List: Since This Date, Last Year

Begin Date: 11/16/2021 to 11/16/2022

Organization
Indicate which organizations should be included in the report by selecting each organization separately, or click the ☒ icon to select all organizations you are authorized to view. Only enrollments created by the Organizations selected here will be included in the export.

Organization: *

- ☒ A Better Way
- ☒ A Mother's Hope
- ☒ Advantage Housing Inc
- ☒ AIDS Ministries Elkhart
- ☒ AIDS Resource Group Evansville

- 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.

Search

Reports / ClientTrack Form

CSV APR - HMIS 2022 Standard

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

Grant(s): ☐ Filter by Grant(s)

Project
A list of projects based on the grant selected.

Project Type: ☐ Filter by Project Type

Project(s): * ☐ Filter by Project(s)

Validation File
Checking this box will generate a separate task to generate a validation file once the file export task has completed. This will not affect the running of or delay the main export. **THIS MUST** be selected to get details of members in the APR and the report used to review the export.

Generate Validation File: ☒

Run Export Cancel

- Click on “Run Export” in the bottom right-hand corner to begin the data export for your program.

Accessing Export Files & Report Preparation

- 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

Export Encryption



If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long.

If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information.

Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should *a/ways* be enclosed in double-quotes.

Encrypt Export: ☒

Password: *

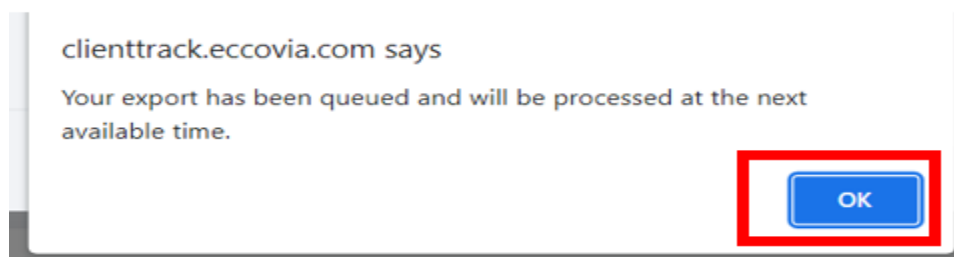
Confirm Password: *

Include Header Row in CSV File(s): ☒

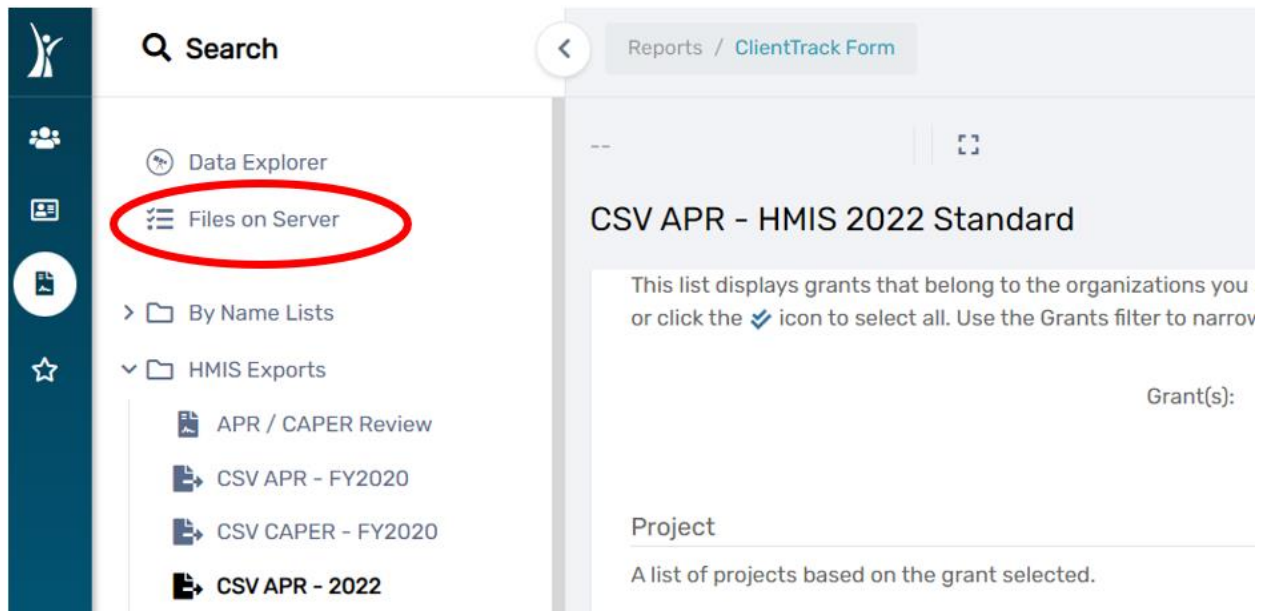
Always Quote CSV Values(s): ☐

Done

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:

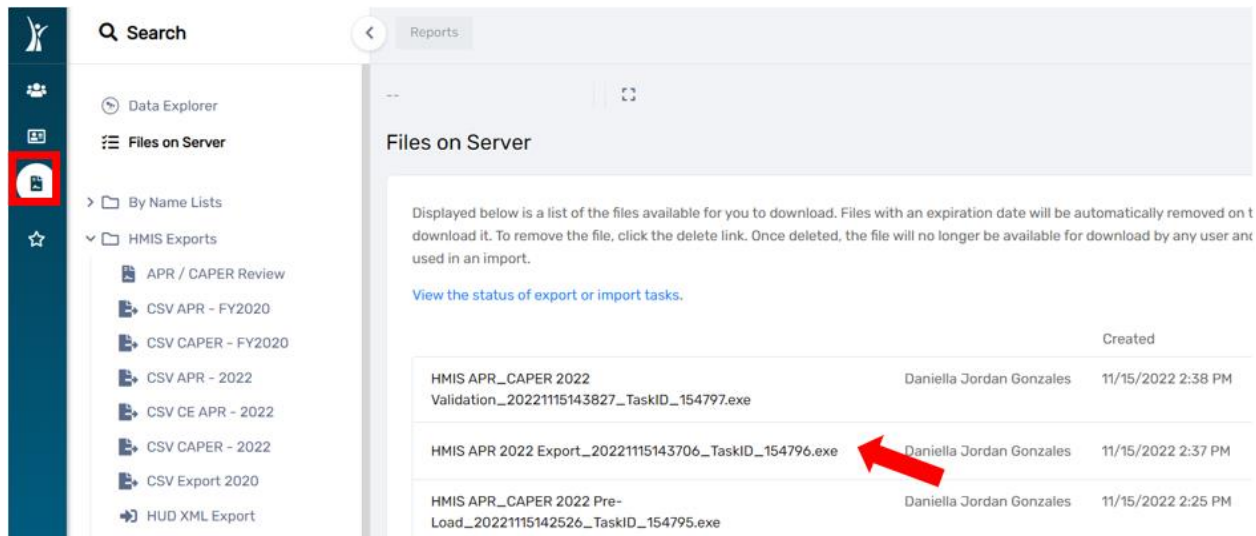
- HMIS APR CAPER 2022 Validation file
- HMIS APR 2022 Export file
- HMIS APR CAPER 2022 Pre-Load file

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

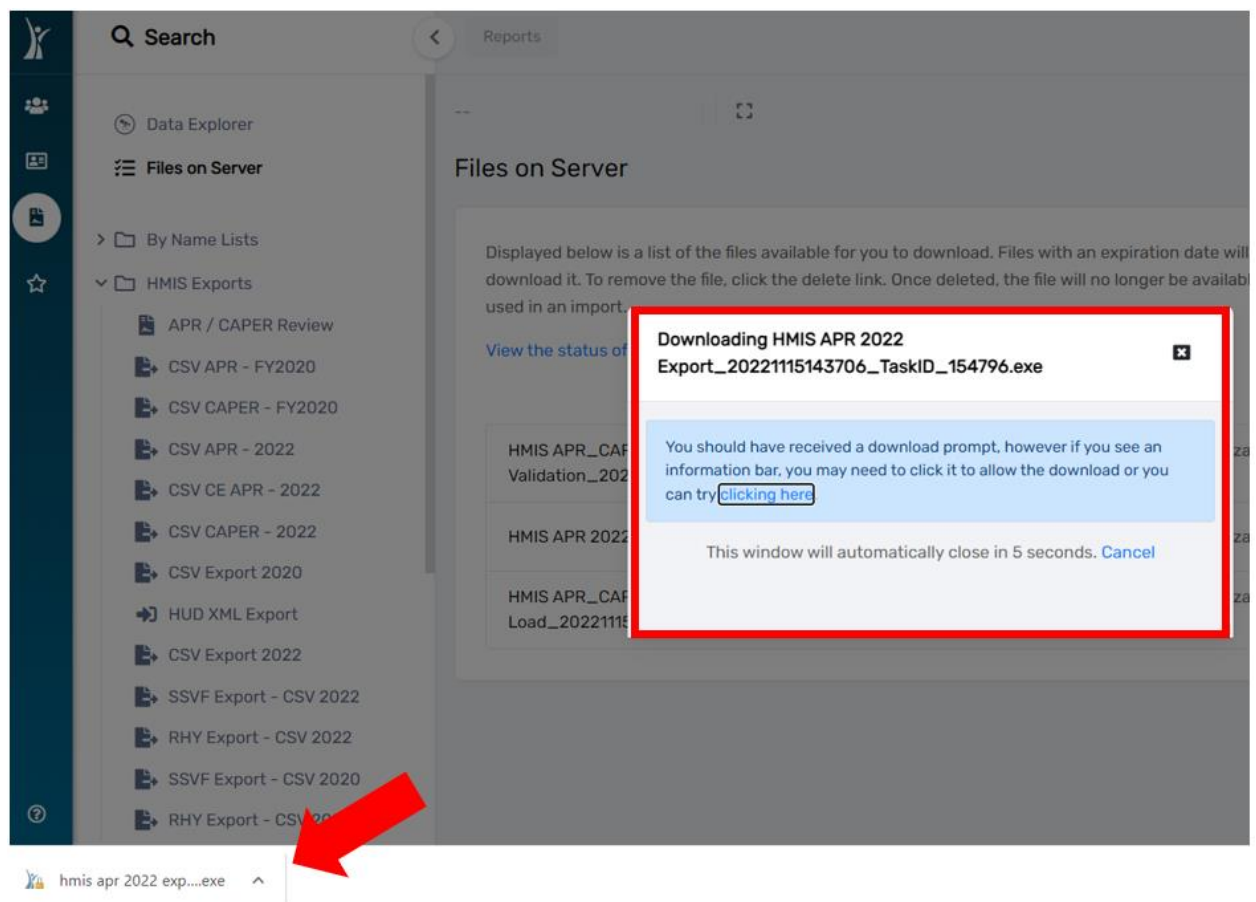
CAPER: You will download, compress, and upload the “HMIS CAPER 2022 Export” file to SAGE.

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

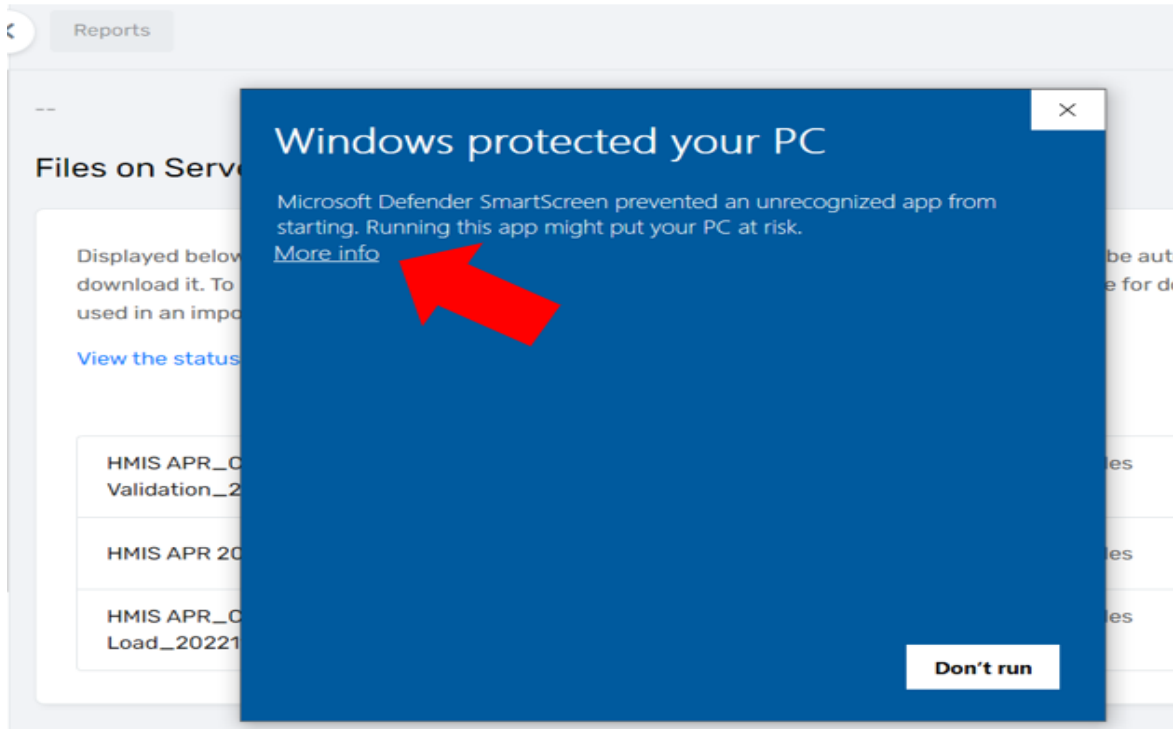
IMPORTANT NOTE: SAGE WILL NOT ACCEPT THE “VALIDATION OR PRE-LOAD” FILE. YOU MUST DOWNLOAD, ZIP (COMPRESS), THEN UPLOAD THE “EXPORT FILE” IN SAGE.



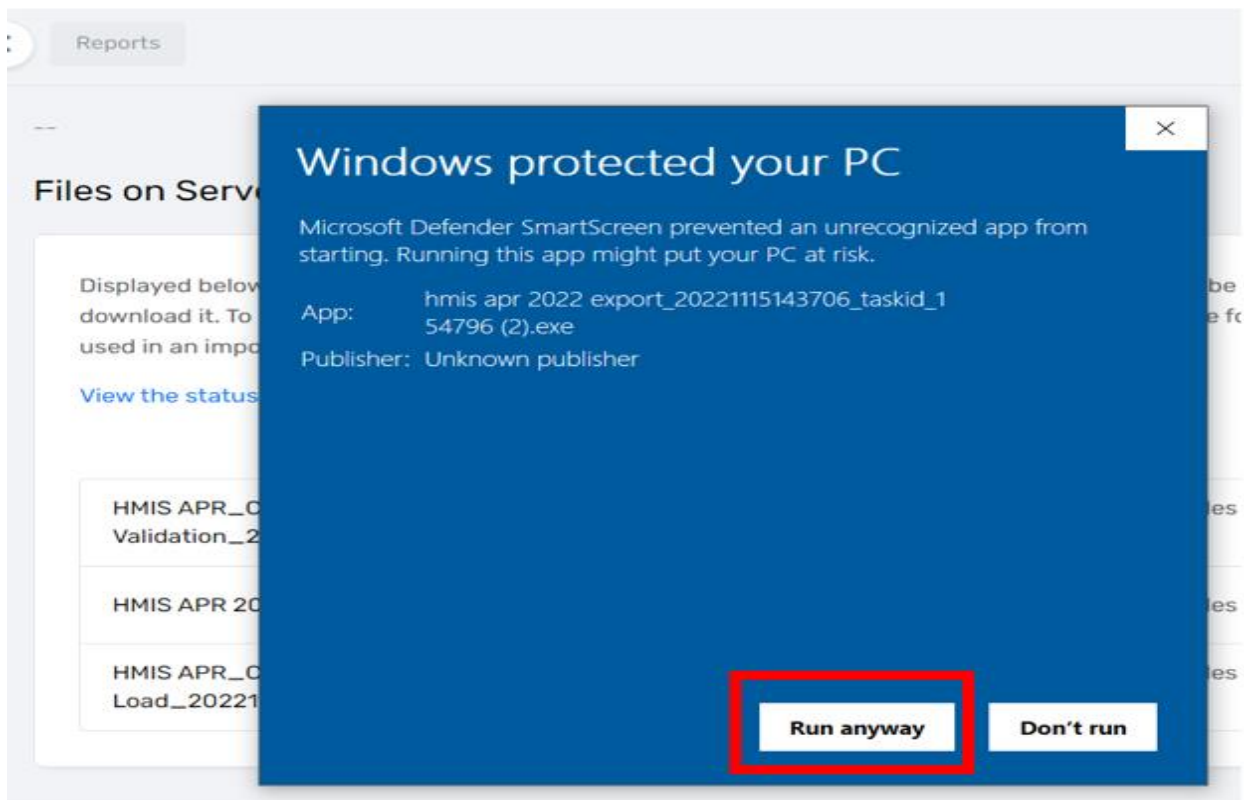
11. After clicking on **"HMIS APR 2022 Export"** file, your screen will display the window shown below. The downloaded file is now visible in the lower left corner of the screen. Right click on the file and select **"Open or Open when done"** as shown below.



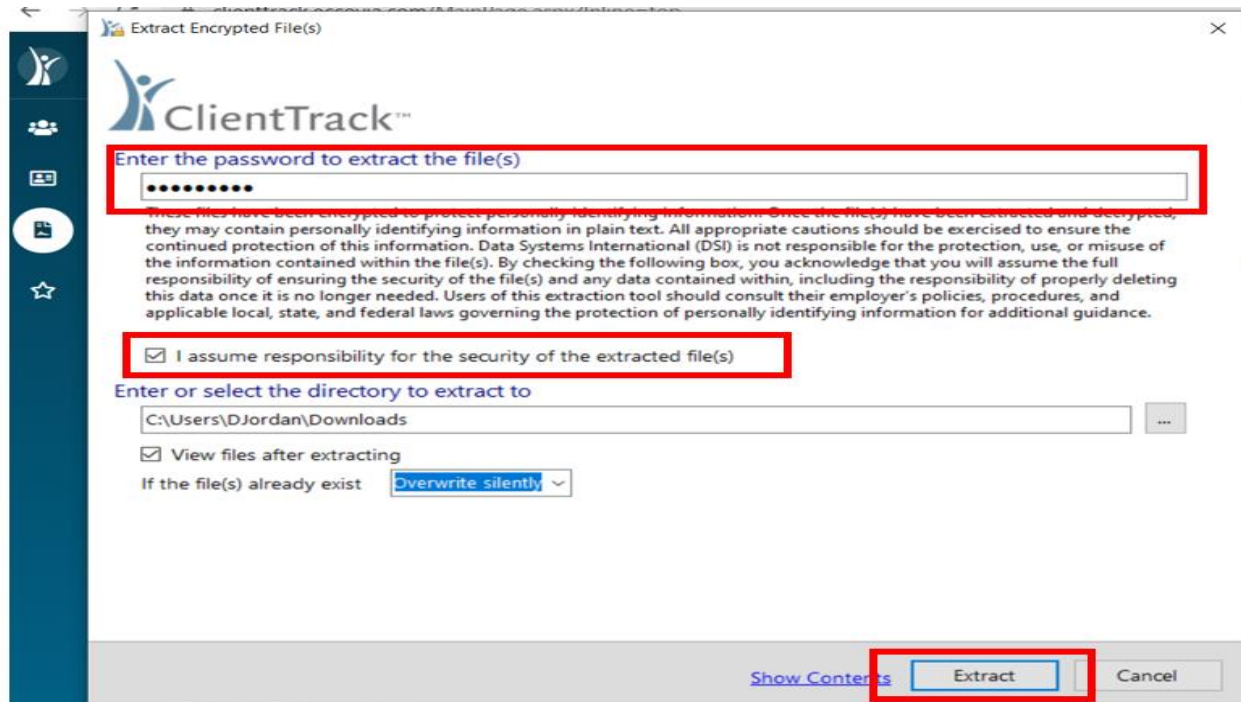
12. You may receive the message below. Please click on **"More info"**



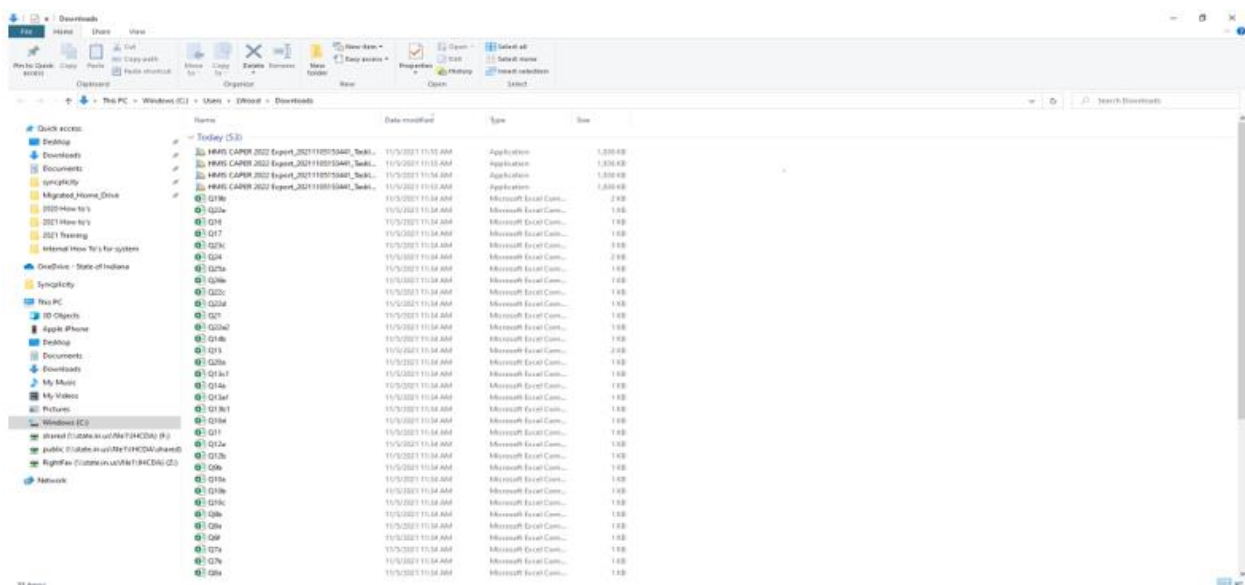
13. Next, click the “Run anyway” option as seen below



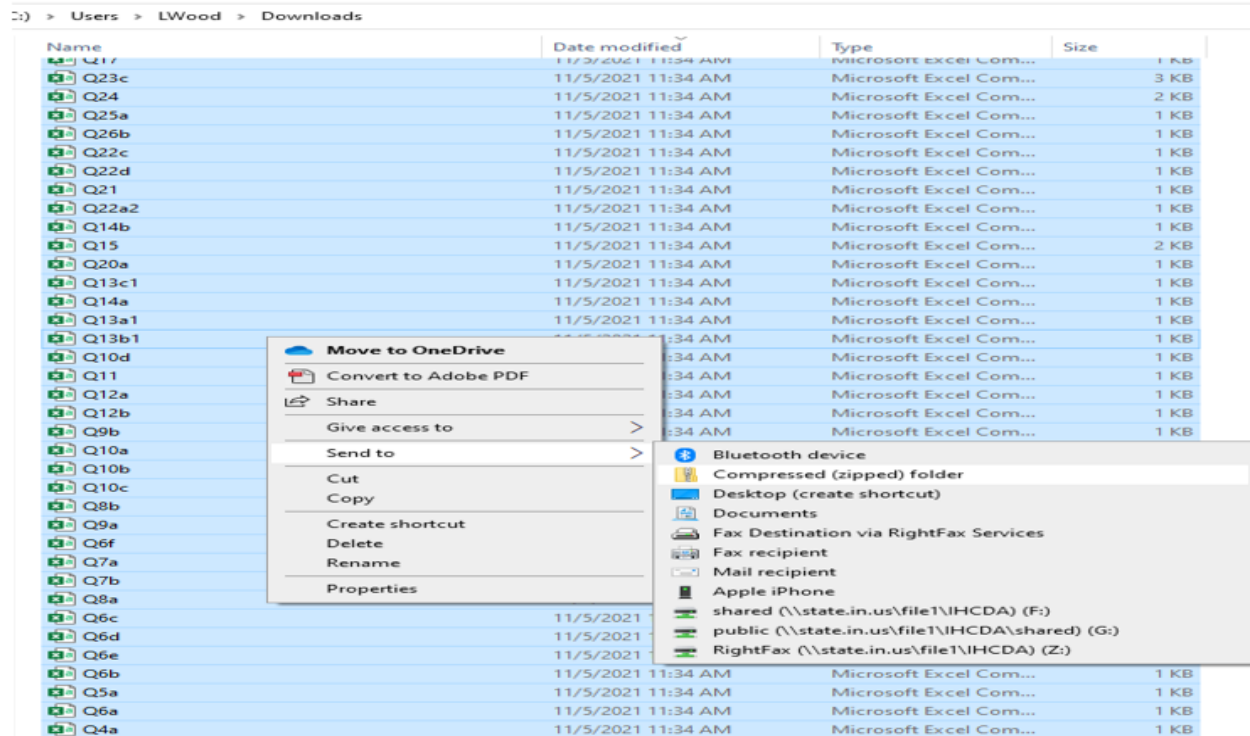
14. Enter the password you created during **Step 4** of this guide, click the check box **“I assume responsibility for the security of the extracted file(s)”**, then select **“Extract”**



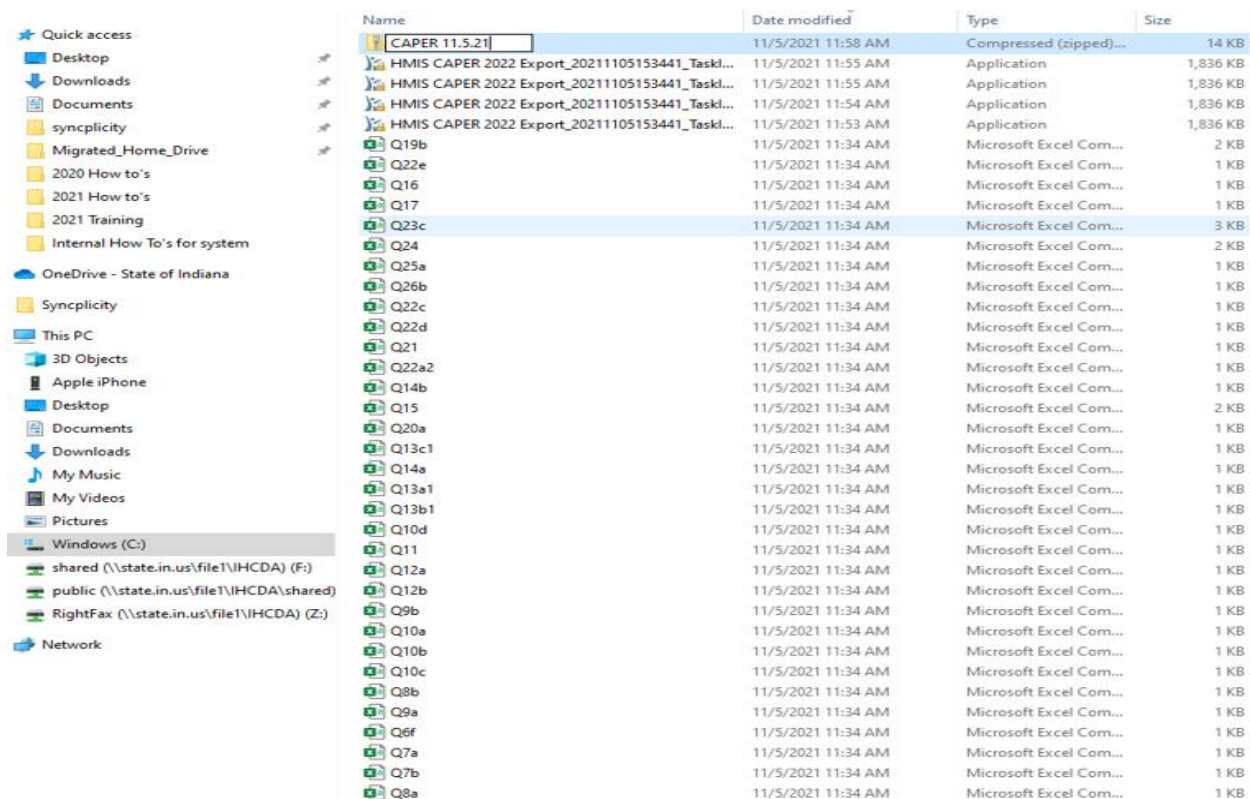
15. The files will download to your computer as seen below.



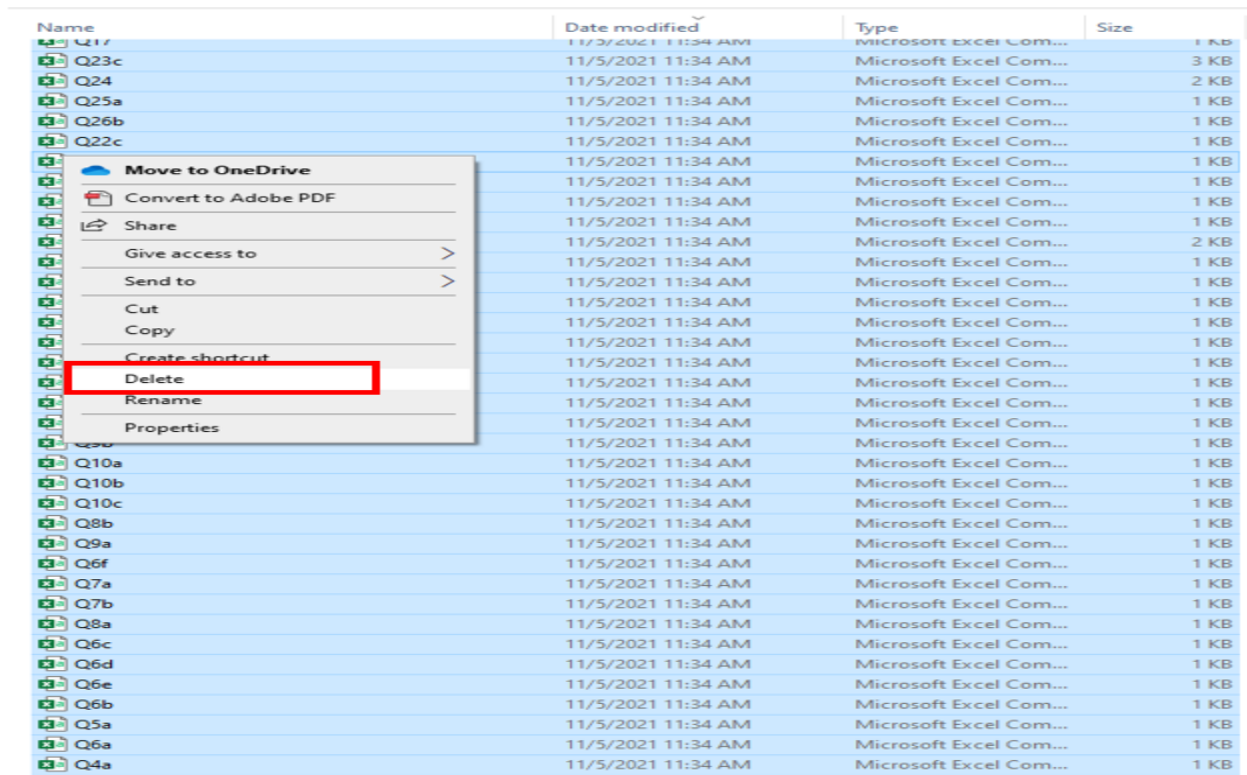
16. Click on the first **“Q”** file and hold down the shift key while using your **“arrow down”** key to highlight all the **“Q”** labeled report files. Next, right click and select the **“Send to” “Compressed (zipped) folder”**



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.

Health Assessment < ?

Select the appropriate general health status. If applicable, you will need to select the appropriate pregnancy status. If the client is pregnant, you will need to record the due date.

Assessment Active

Assessment Date: * 12/16/2021 📅

General Health Status: * Fair ▼

Dental Health Status: * Poor ▼

Mental Health Status: * Fair ▼

Pregnancy Status: * -- SELECT -- ▼

Restriction: * ☐ Restrict to Organization ☒ Restrict to MOU/Info Release ?

HMIS WELL-BEING ASSESSMENT (PH PROJECTS ONLY)

HMIS Well-Being Assessment

The Well-being Assessment is used to collect responses from the client. Clicking this button will fill in default information from the selected client's most recent assessment. [Default Client's Last Assessment](#) **Assessment Active**

Assessment Date: * 12/16/2021

Client perceives their life has value and worth: *

- ☐ Strongly Disagree
- ☐ Somewhat Disagree
- ☐ Neither Agree Nor Disagree
- ☐ Somewhat Agree
- ☒ Strongly Agree
- ☐ Client Doesn't Know
- ☐ Client Refused
- ☐ Data Not Collected

Client perceives they have support from others who will listen to problems: *

- ☐ Strongly Disagree
- ☐ Somewhat Disagree
- ☐ Neither Agree Nor Disagree
- ☒ Somewhat Agree
- ☐ Strongly Agree
- ☐ Client Doesn't Know
- ☐ Client Refused
- ☐ Data Not Collected

Client perceives they have a tendency to bounce back after hard times: *

- ☐ Strongly Disagree
- ☐ 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: * Once A Month

Restriction: *

- ☐ Restrict to Organization
- ☒ Restrict to MOU/Info Release

Save **No Changes**

- 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:

Coordinated Entry Event

Coordinated Entry Event Data Collection

Date of Event: * 11/29/2022 

Event Type: * -- SELECT --

Provider: -- SELECT --

Enrollment: *

Access Events

- Referral to Prevention Assistance project
- CE - Case Management
- Problem Solving/Diversion/Rapid Resolution intervention or service
- Referral to scheduled Coordinated Entry Crisis Needs Assessment
- Referral to scheduled Coordinated Entry Housing Needs Assessment

Referral Events

- Referral to post-placement/follow-up case management
- Referral to Street Outreach project or services
- Referral to Housing Navigation project or services
- Referral to Non-continuum services: Ineligible for continuum services
- Referral to Non continuum services: No availability in continuum services
- Referral to Emergency Shelter bed opening
- Referral to Transitional Housing bed/unit opening
- Referral to Joint TH-RRH project/unit/resource opening
- Referral to RRH project resource opening
- Referral to PSH project resource opening
- Referral to Other PH project/unit/resource opening
- CE - Referral to Emergency Housing Voucher

CE - Case Management
 Problem Solving/Diversion/Rapid Resolution intervention or service
 Referral to scheduled Coordinated Entry Crisis Needs Assessment
 Referral to scheduled Coordinated Entry Housing Needs Assessment

Referral Events

Referral to post-placement/follow-up case management
 Referral to Street Outreach project or services
 Referral to Housing Navigation project or services
 Referral to Non-continuum services: Ineligible for continuum services
 Referral to Non continuum services: No availability in continuum services
 Referral to Emergency Shelter bed opening
 Referral to Transitional Housing bed/unit opening
 Referral to Joint TH-RRH project/unit/resource opening
 Referral to RRH project resource opening
 Referral to PSH project resource opening
 Referral to Other PH project/unit/resource opening

Referral to Emergency Assistance/Flex Fund/Furniture Assistance
 Referral to Emergency Housing Voucher (EHV)
 Referral to a Housing Stability Voucher

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.

Client Dashboard

Client: Luke Skywalker
 Birth Date: 1/1/2000
 Client ID: 1048334

Luke Skywalker's Dashboard

Luke Skywalker's Information

Name:	Skywalker, Luke	Birth Date:	1/1/2000	Age:	22
Gender:	Male	Veteran:	Data Not Collected		
Ethnicity:	Data not collected	Race:	Data not collected		

Luke's Enrollments

1 result found.

Enrollment Description	Case Members	Project Start Date	Exit Date	Housing Move-In Date	Enroll ID	Exit ID	Exit Destination	Organization	Last Assessment Completed
Coordinated Entry (R1)	1	11/07/2022			1971922			Coordinated Entry Region 1	11/07/2022

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

Search

Find Client

Coordinated Entry Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Dashboard

Edit Client

Client CE Consent Forms

Case Notes

Assessments

Referrals

Services

Quick Services

Enrollments

Family Members

Paused Workflows

Client Services

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

+ Add New Service + Quick Services + Add CE Event

1 result found.

Date	Service	Units	\$ Total	Organization
11/07/2022	CE - Case Management	1.00	\$0.00	Coordinated Entry Region 1

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

Search

Find Client

Coordinated Entry Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Dashboard

Edit Client

Client CE Consent Forms

Case Notes

Assessments

Referrals

Services

Quick Services

Enrollments

Family Members

Paused Workflows

Coordinated Entry Event

Coordinated Entry Event Data Collection

Date of Event: 11/07/2022

Event Type: -- SELECT --

Provider:

Enrollment:

Restriction:

Referral to scheduled Coordinated Entry Crisis Needs Assessment

Referral to scheduled Coordinated Entry Housing Needs Assessment

Referral Events

Referral to post-placement/follow-up case management

Referral to Street Outreach project or services

Referral to Housing Navigation project or services

Referral to Non-continuum services: Ineligible for continuum services

Referral to Non-continuum services: No availability in continuum services

CE - Referral - Housing - Emergency Shelter

Referral to Emergency Shelter bed opening

Referral to Transitional Housing bed/unit opening

Referral to Joint TH-RRH project/unit/resource opening

Referral to RRH project resource opening

CE - Referral - Housing - Permanent Supportive Housing

Referral to PSH project resource opening

Referral to Other PH project/unit/resource opening

CE - Referral to Emergency Housing Voucher

Referral to Emergency Assistance/Flex Fund/Furniture Assistance


Referral to Emergency Housing Voucher (EHV)


Referral to a Housing Stability Voucher


Save Cancel


Coordinated Entry Event


Coordinated Entry Event Data Collection



Date of Event: * 11/07/2022 


Event Type: * Referral to Emergency Housing Voucher (EHV) 


Provider: * Coordinated Entry Region 

Enrollment: * 11/07/2022 - Coordinated Entry (R1) 


Refer to Provider: * 



Referral Result: * -- SELECT --  

Result Date: * MM/DD/YYYY 


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


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.

Search 

Find Provider  

23 results found.

Provider 	Street Address	Zip Code	City	State	Notes
Bloomington Housing Authority	1007 N Summit St	47404	Bloomington	IN	
Coordinated Entry Region 1					
Coordinated Entry Region 10					
Coordinated Entry Region 11					
Coordinated Entry Region 12					
Coordinated Entry Region 13					
Coordinated Entry Region 14					
Coordinated Entry Region 1a					
Coordinated Entry Region 2a					
Coordinated Entry Region 3					
Coordinated Entry Region 4					
Coordinated Entry Region 5					

Cancel 

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

Coordinated Entry Event

Coordinated Entry Event Data Collection

Date of Event: 11/07/2022

Event Type: Referral to Emergency Housing Voucher (EHV)

Provider: Coordinated Entry Region


Enrollment: 11/07/2022 - Coordinated Entry (R1)

Refer to Provider: Coordinated Entry Region

Referral Result: -- SELECT --

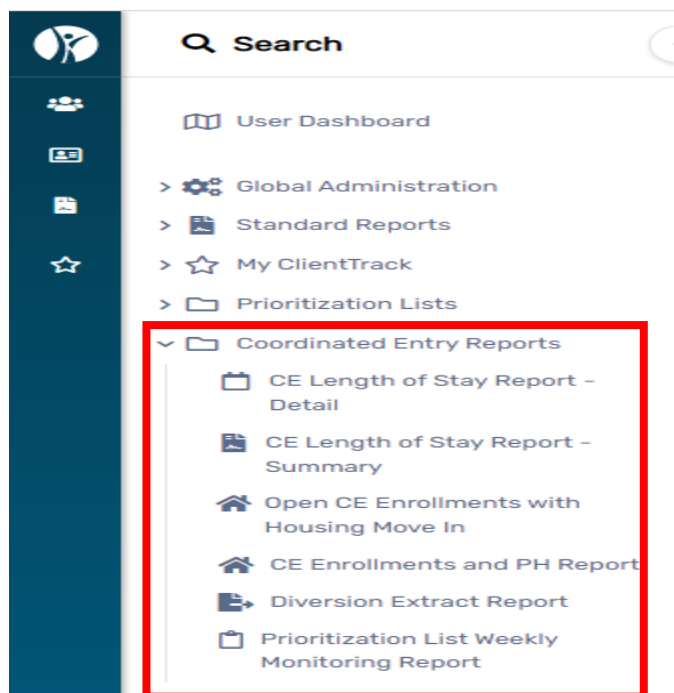
Result Date: MM/DD/YYYY

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

 **Save** Cancel

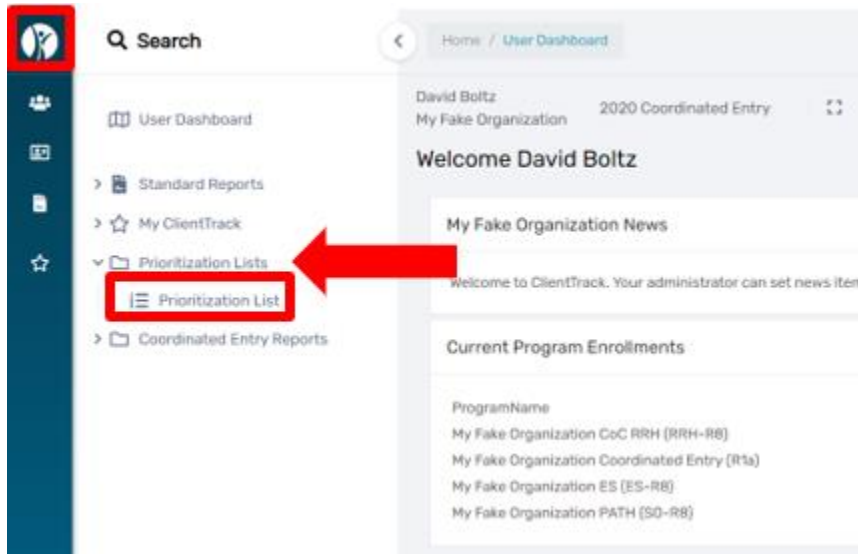
COORDINATED ENTRY REPORTS

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”**

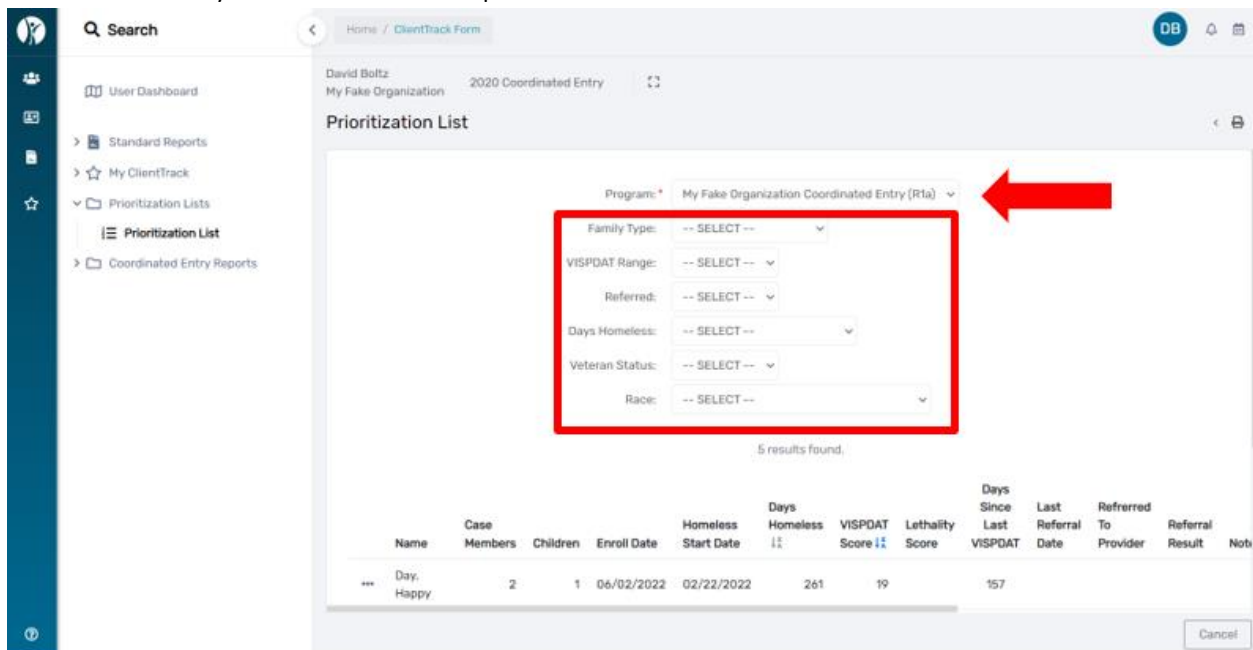




Prioritization List

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.

David Boltz
My Fake Organization 2020 Coordinated Entry

Prioritization List

5 results found.

Click to sort in descending order

Name	Case Members	Children	Enroll Date	Homeless Start Date	Days Homeless	VISPDAT Score	Lethality Score	Days Since Last VISPDAT	Last Referral Date	Referred To Provider	Referral Result	Notes
Merkel, Marta	1	0	11/07/2022	10/11/2022	30	13	3	3				
Bear, Gummy	2	1	11/06/2022			17		4				
Turtle, Leonardo	1	0	10/27/2022	01/01/2022	313	0		14				
Day, Happy	2	1	06/02/2022	02/22/2022	261	19		157				
Day, New	1	0	02/21/2022	02/15/2022	268	15	3	262				

- 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.)**
- 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.

David Boltz
My Fake Organization 2020 Coordinated Entry

Prioritization List

5 results found.

Program: My Fake Organization Coordinated Entry (R1a)

Family Type: -- SELECT --

VISPDAT Range: -- SELECT --

Referred: -- SELECT --

Days Homeless: -- SELECT --

Veteran Status: -- SELECT --

Race: -- SELECT --

Excel Data Export

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.

The screenshot shows the 'ClientTrack Form' interface. On the left sidebar, the 'CE Length of Stay Report - Detail' is selected. The main content area displays the 'Saved Report Settings' section. It includes a dropdown menu for 'Saved Report Settings' set to '-- SELECT --'. Below this, there are two date pickers: 'From Date' and 'To Date', both set to 'MM/DD/YYYY'. A list of programs is shown, including 'Coordinated Entry (R1)', 'Coordinated Entry (R10)', 'Coordinated Entry (R11)', 'Coordinated Entry (R12)', and 'Coordinated Entry (R13)'. The 'Report' button is highlighted in red at the bottom right.

- 80

CE Length of Stay

From Date: 1/1/2018
To Date: 11/10/2022
Program(s): My Fake Organization Coordinated Entry (R1a)

Client ID	Name	Enroll Date	Exit Date	Length of Stay	Destination	Program Name	Household ID	Own ing Org	VI SPDAT	VI SPDATDate
1048330	Baby, Fur	9/8/2022	10/3/2022	25	No exit interview completed	My Fake Organization Coordinated Entry (R1a)	532054	My Fake Organization	15	9/9/2022
1048319	Bear, Chewy	6/6/2022	9/9/2022	92	Rental by client with RRH or equivalent subsidy	My Fake Organization Coordinated Entry (R1a)	532056	My Fake Organization		
1048319	Bear, Chewy	11/9/2022		4		My Fake Organization Coordinated Entry (R1a)	532056	My Fake Organization		
1048318	Bear, Gummy	6/6/2022	9/9/2022	92	Rental by client with RRH or	My Fake Organization	532056	My Fake	17	11/6/2022

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.

CE Length of Stay Summary

Saved Report Settings

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

Saved Report Settings: -- SELECT --

From Date: 01/01/2018
To Date: 11/10/2022
Program: Coordinated Entry (R6), Coordinated Entry (R7), Coordinated Entry (R8), Coordinated Entry (R9), **My Fake Organization Coordinated Entry (R1a)**

Report **Schedule Report** **Cancel**

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 Summary

Criteria

From Date: 01/01/2018
To Date: 11/10/2022
Program(s): My Fake Organization Coordinated Entry (Rta)

Summary	Count
Active Enrollments	9
New Enrollments	12
Exits	3
Avg Length of Stay (Stayers)	70
Avg Length of Stay (Leavers)	69

Destinations	Count
No exit interview completed	1
Rental by client with RRIH or equivalent subsidy	2

Buttons: Schedule Report, Cancel

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.

Open CE Enrollments with Housing Move In

Returns a list of clients who have an open Coordinated Entry Enrollment and a Move In Date on a subsequent enrollment.

Saved Report Settings

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

Saved Report Settings: -- SELECT --

Program: My Fake Organization Coordinated Entry (Rta)

Buttons: Report, Schedule Report, Cancel

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

Criteria

CE Program : My Fake Organization Coordinated Entry (R1a)

Client ID	Name	CE Enrollment Date	Case Manager For CE	CE Exit Date	Project Start Date	Program	Move In Date
1040316	Day, Happy	6/2/2022	Lon Wood		6/6/2022	My Fake Organization CoC RRH (RRH-R8)	6/6/2022

1 of 1

11/10/2022 10:56:24 AM

- 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

- From the **"Home"** workspace, locate the **"Coordinated Entry Reports"** function in the menu on the left-hand side of the screen.
- Click on **"Coordinated Entry Reports"**. The menu will expand below, click on **"CE Enrollments and PH Report"** to open the report.
- 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.

Home / ClientTrack Form

David Boltz
My Fake Organization

2020 Coordinated Entry

CE Enrollments and Permanent Housing Report

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

Enroll From Date: 01/01/2018

Enroll To Date: 11/10/2222

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):

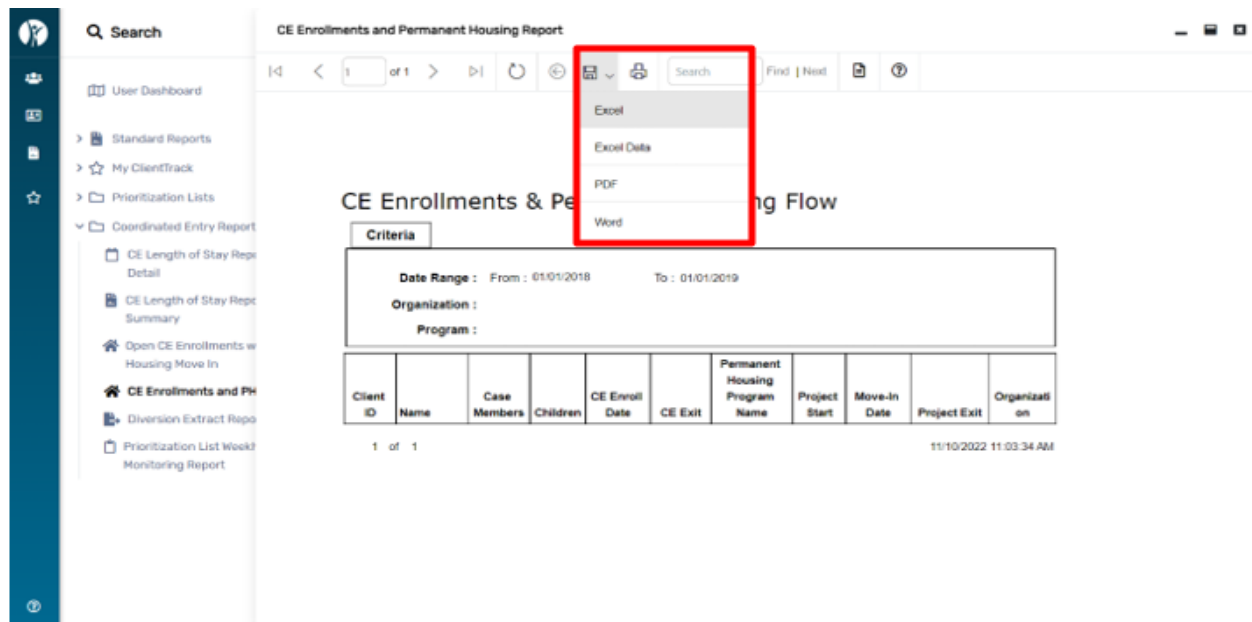
- A Better Way
- A Mother's Hope
- Advantage Housing Inc
- AIDS Ministries Elkhart
- AIDS Resource Group Evansville

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)

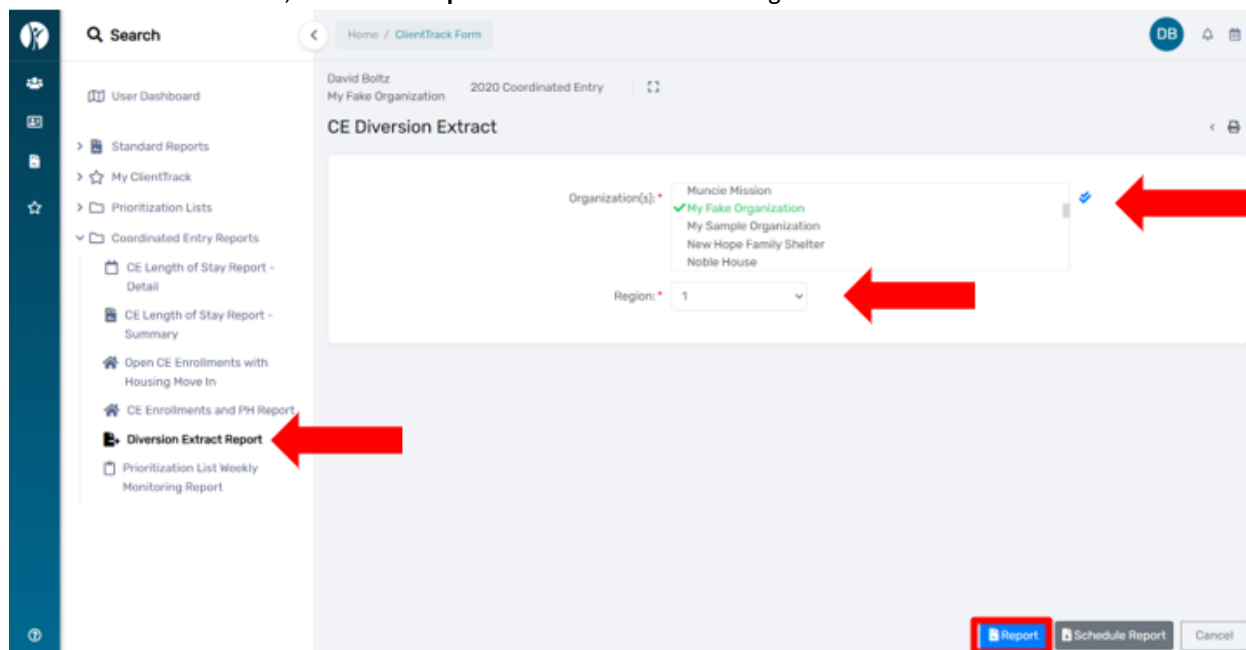
Report Schedule Report Cancel



- 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

- From the **“Home”** workspace, locate the **“Coordinated Entry Reports”** function in the menu on the left-hand side of the screen.
- Click on **“Coordinated Entry Reports”**. The menu will expand below, click on **“Diversion Extract Report”** to open the report.
- 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.



- 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

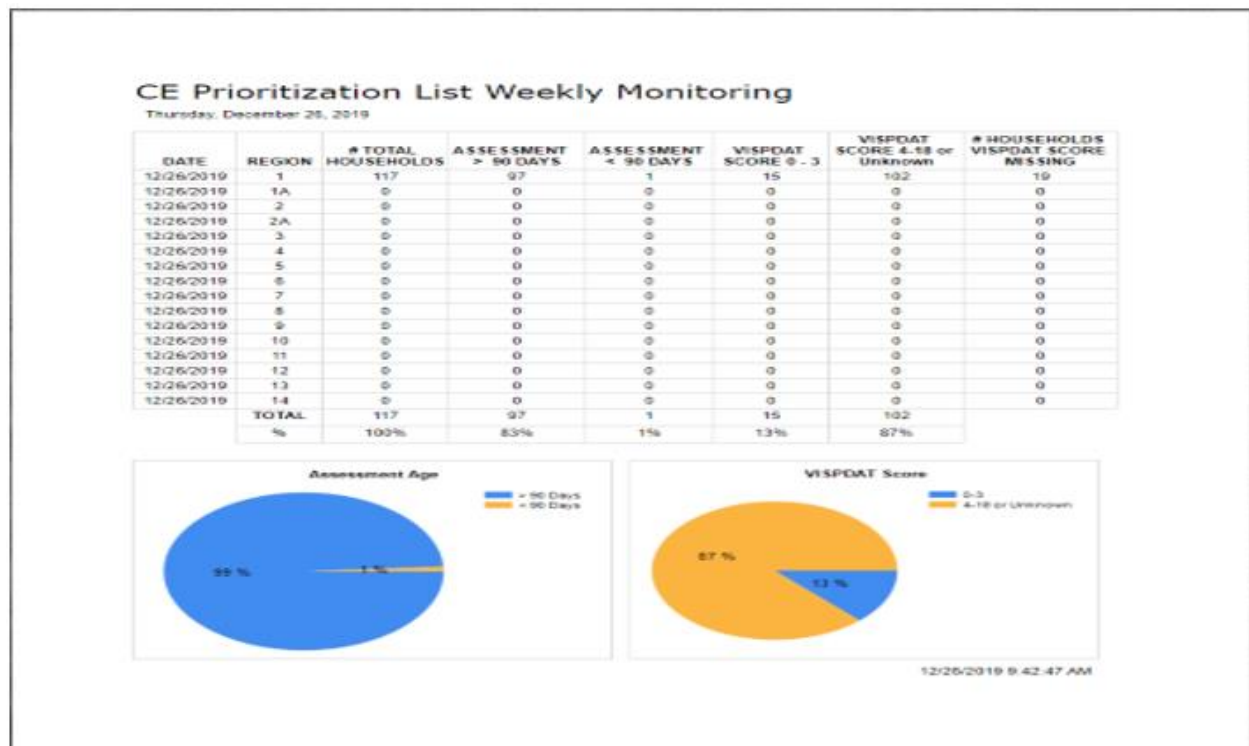
ClientTrack™ Reports

David Boltz
11/10/2022 11:07 AM

- Once exported to Excel, a zero (0) indicates “No” and a one (1) indicates “Yes”.

Prioritization List Weekly Monitoring Report

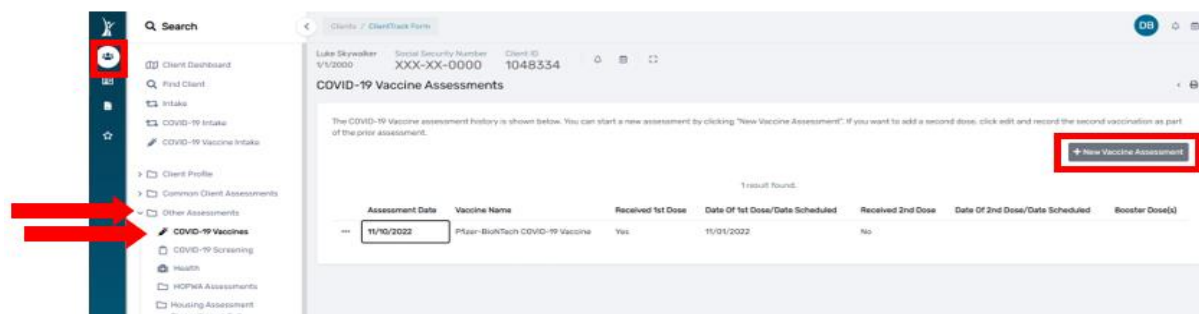
- From the “Home” workspace, locate the “Coordinated Entry Reports” function in the menu on the left-hand side of the screen.
- Click on “Coordinated Entry Reports”. The menu will expand below, click on “Prioritization List Weekly Monitoring Report” to open the report.
- All regions are included in this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



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.

The screenshot shows the 'COVID-19 Vaccine Assessment' form. The form is divided into sections for the 1st and 2nd doses. The 1st dose section is highlighted with a red box, showing fields for 'For the following questions, are the responses ONLY self-reported by the Client?', 'Does the Client have a COVID-19 Immunization Information System Recipient ID?', 'Has Client received 1st dose of COVID-19 Vaccine?', 'Date Of Vaccine', 'COVID-19 Vaccine Manufacturer', 'Location Of Vaccination', and 'Vaccine Administration Site'.

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.

PROFILE



Grant Peters
gpeters@ihcda.in.gov
Indiana HMIS Train

ACCOUNT SETTINGS

Workgroup

2020 Coordinated Entry

Organization

Coordinated Entry Region 1

Location

Apply

[Open Workgroup Designer](#)

[Security Settings](#)

[Clear Preferences](#)

[Sign Out](#)

3. From the left hand “Workspace” menu, click on “Clients”.

The screenshot shows the IHCD HMIS interface. On the left is a dark blue sidebar with a 'Workspace' menu. A red arrow points to the 'Clients' icon in this menu. The main content area shows the 'Client Dashboard' for Michelangelo Turtle, including his information, enrollments, and case manager assignments.

Michelangelo Turtle's Information

Name:	Turtle, Michelangelo	Birth Date:	1/1/1990	Age:	32
Gender:	Male	Veteran:	Client Doesn't Know		
Ethnicity:	Non-Hispanic/Non-Latin(a)(o)(x)	Race:	Client doesn't know		

Michelangelo's Enrollments

1 result found.

Enrollment Description	Case Members	Project Start Date	Exit Date	Housing Move-In Date	Enroll ID	Exit ID	Exit Des
Current							
My Fake Organization ES (ES-R8)	1	10/24/2022			1971910		

Michelangelo's Case Manager Assignments

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”

Find Client

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

First Name:

Last Name:

Middle Name:

Full Name (Last, First):

Social Security Number: --

Birth Date: MM/DD/YYYY

Client ID:

Search

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

Find Client

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

First Name:

Last Name:

Middle Name:

Full Name (Last, First):

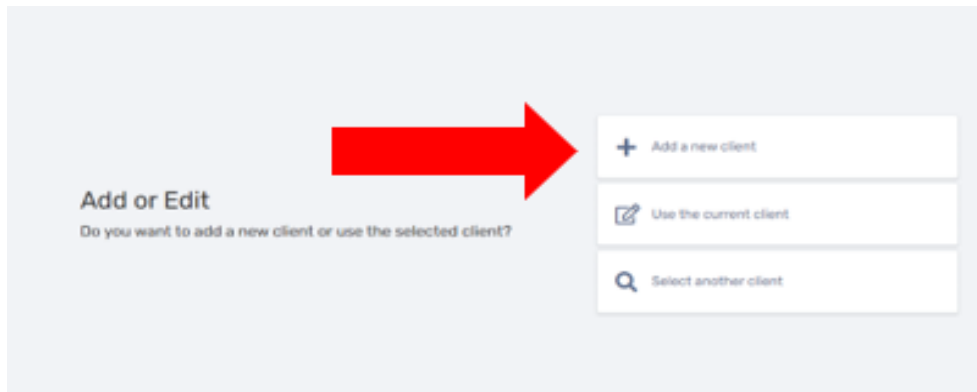
Social Security Number: --

Birth Date: MM/DD/YYYY

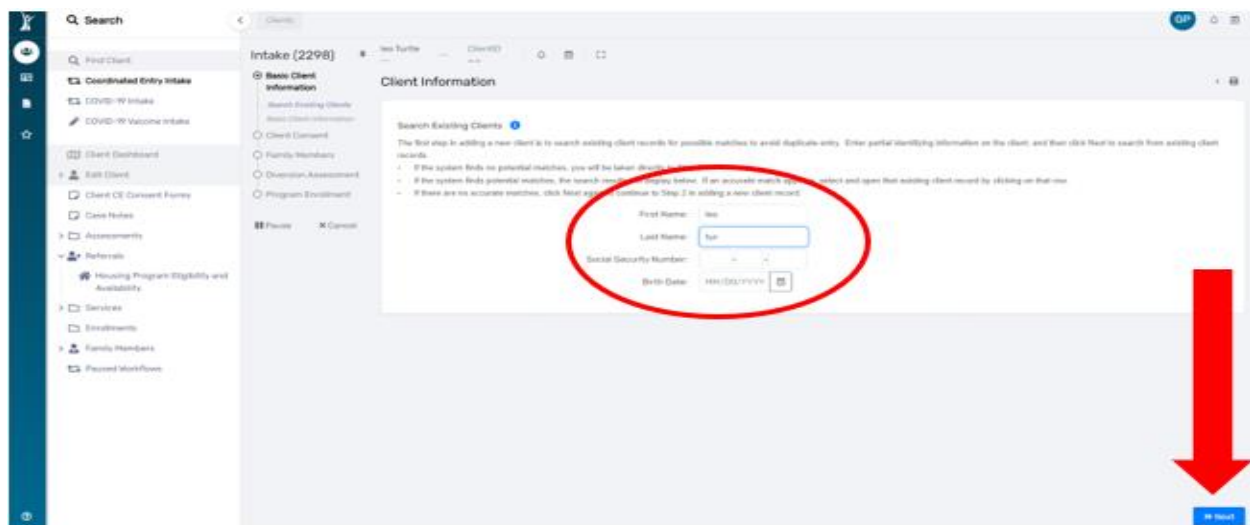
Client ID:

Search

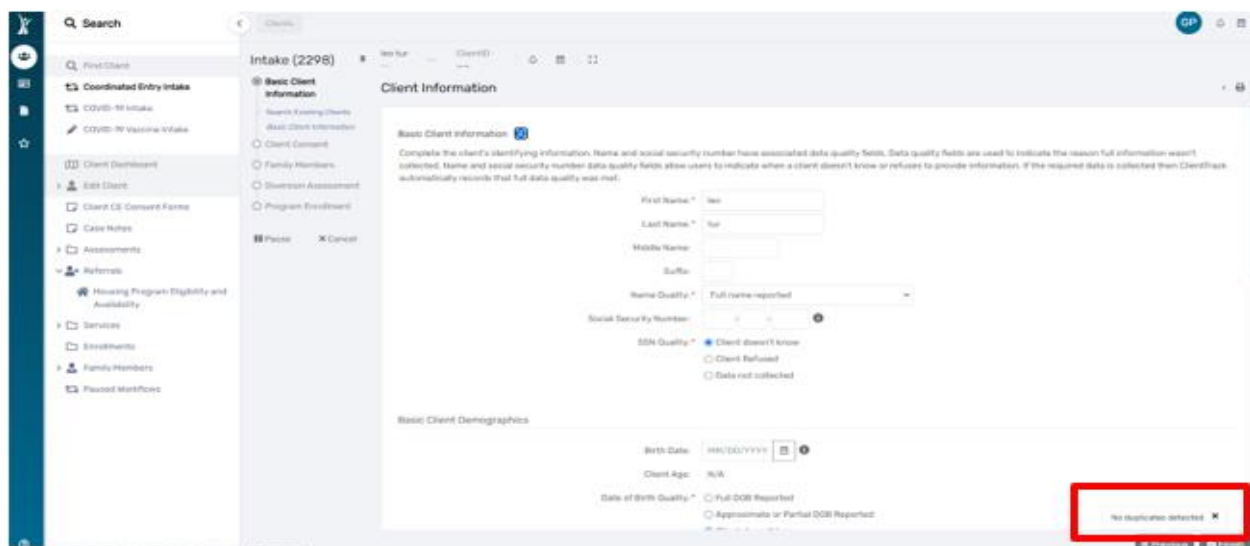
7. Click on **“Add a new client”**.



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.

The screenshot shows the 'Client Information' form in the HMIS system. The form is titled 'Intake (2298)' and 'Client Information'. It contains several fields with red asterisks indicating required information: First Name*, Last Name*, Middle Name*, Suffix*, Name Quality*, Social Security Number*, Birth Date*, Client Age*, Date of Birth Quality*, Gender*, Race*, and Client doesn't know. A large red arrow points from the left sidebar to the form fields. Another red arrow points to the 'Finish' button at the bottom right.

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).

The screenshot shows the 'Client Consent' form in the HMIS system. The form is titled 'Intake (2298)' and 'Client Consent'. It contains a section for 'HMIS Client Consent' with a paragraph of text and a 'Sign' button at the bottom right.

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.

First Name	Middle Name	Last Name	Suffix	Name Quality	Birth Date	Age	Birth Date Quality
Leonardo		Turtle		Full name reported	01/01/1990	32	Full DOB
Michelangelo		Turtle		Full name reported	01/01/1990	32	Full DOB
Raphael		Turtle		Full name reported	01/01/1990	32	Full DOB

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.

The screenshot shows the 'Intake (2298)' form for Leonardo Turle. The 'Diversion Assessment' tab is selected and highlighted with a red circle. A red arrow points to the 'Housing Crisis' section, which contains several dropdown menus for selecting reasons for housing crisis: Problem with Landlord, Rental or Utility Issues, Eviction, Foreclosure, Condemned Property, Unable to Pay Rent, Overcrowding, and Other. Below this is the 'DV and Lethality' section with a dropdown for '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?'.

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**.

The screenshot shows the 'Intake (2298)' form for Leonardo Turle. The 'Diversion Assessment' tab is selected. A red arrow points to the 'DV and Lethality' section, which contains a dropdown for '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?'. Below this is the 'Diversion Questions' section with two dropdowns: 'Are you safe in your current living conditions?' and 'Is there anyone else you could stay with temporarily if you were able to receive case management, transportation and/or limited financial assistance?'. The 'Diversion' section has a dropdown for 'Are you diverting client?'. The 'Restriction Options' section is at the bottom.

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.

The screenshot displays the HMIS system interface for a client named Leonardo Turtle (Intake 2298). The client's date of birth is 1/1/1990, and their ClientID is 1048333. The form is titled 'Diversion Assessment' and includes several sections:

- Basic Client Information:** Includes fields for 'Overcrowding' and 'Other', both with '--SELECT--' dropdown menus.
- Client Consent:** Includes a 'DV and Lethality' section with a 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?' with a '--SELECT--' dropdown.
- Family Members:** Includes a 'Diversion Questions' section with two questions: 'Are you safe in your current living condition?' and 'Is there anyone else you could stay with temporarily if you were able to receive case management, transportation and/or limited financial assistance?'. Both have '--SELECT--' dropdown menus.
- Program Enrollment:** Includes a 'Diversion' section with a question: 'Are you diverting client?' and a 'Divert Client?' dropdown menu.
- Restriction options:** A section at the bottom of the form.

A red oval highlights the 'Diversion Questions' section, and a red arrow points to the 'Save' button at the bottom right of the form. The 'Save' button is labeled 'Save' and 'No Changes'.

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.

HUD Program Enrollment

- For **Safe Havens and Transitional Housing** - it is the date the client moves into the residence project (i.e. first night in residence).
- For all types of **Permanent Housing**, including **Rapid Re-Housing** - it is the date following application that the client was admitted into the project. To be admitted indicates the following factors have been met:
 - Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to "qualify" - though all documentation may not yet have been gathered)
 - The client has indicated they want to be housed in this project
 - The client is able to access services and housing through the project. The expectation is the project has a housing opening (in-situ, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time
- For all other types of service projects including but not limited to services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and ultimately received the first provision of service.

Project: **My Fake Organization Coordinated Entry (RHC)**

Household

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

Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household*
Turtle, Michelangelo	Male	32	MM/DD/YYYY		---SELECT---
Turtle, Raphael	Male	32	MM/DD/YYYY		---SELECT---
Turtle, Leonardo	Male	32	MM/DD/YYYY		---SELECT---

Save

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

Universal Data Assessment

Complete the information below related to the client's housing status and other relevant information. Note: **Assessment Date** reflects real time data entry as described in the Data Dictionary. The **Default Last Assessment** button will only exist in any SPT data. Changing any project setup data with existing enrollments may break or break the logic for SPT. SPT may not always show as expected because of changed enrollments or missing required data links.

Default Client's Last Assessment

Assessment Date: **10/25/2022**

Age at Assessment: **32**

Assessment Type: **Entry**

Assessor: **Grant Peters**

Program: **My Fake Organization Coordinated Entry (RHC)**

Disabling Condition: **Client Doesn't Know**

Client Location

Select or enter the CoC code assigned to the geographic area where the head of household is staying at the time of program admission. Client location will be defaulted to the program's CoC within a workflow.

Client Location: **IN-002 - Indiana Balance of State**

Living Situation

Identify the type of residence and length of stay at that residence just prior to (i.e. the night before) program admission.

Prior Living Situation: **---SELECT---**

Save

- **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)

Intake (2298) | Leonardo Turle | 222-02-2222 | ClientID: 1048333

Universal Data Assessment

Client Location
Select or enter the CoC code assigned to the community area where the head of household is staying at the time of program entry. Client location will be defaulted to the program's CoC within a workflow.
Client Location: IN-502 - Indiana Balance of State

Living Situation
Identify the type of residence the client is currently staying in and residence just prior to entry into homelessness.
Prior Living Situation: Place not meant for habitation

Length of stay in the prior living situation: One year or longer

Approximate date homelessness started: 01/01/2022

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: Client refused

Total number of months homeless on the street, in ES, or SH in the past three years: Client doesn't know

Health Insurance
Please indicate whether or not the client is covered by health insurance. If no, you will be able to record health insurance sources for the client.
Default Last Insurance Status: [Button]

Covered by Health Insurance: SELECT

[Save]

- **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.*

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

Intake (2298) Leonardo Turtle 1/1/1990 222-22-2222 ClientID 1048333

HMIS Triage Assessment

Assess the clients current situation with the questions below. This data can be used for prioritization of services needed for the client.

Assessment Active

Assessment Date: 10/27/2022

Assessment Location: My Fake Organization

Assessment Contact Type: Phone

What is your household type: Household with children and adults

Information Date: 10/27/2022

Enrollment: 10/27/2022 - My Fake Organization Coordinated Entry (RtA)

Verified by Project: My Fake Organization ES (ES-RB)

Current Living Situation Information

Current Living Situation: -- SELECT --

Location Detail:

Record Contact: ☐

Save

- 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”**

intake (2298) Leonardo Turtle 222-22-2222 ClientID 1048333

HMIS Triage Assessment

What is your household type? Household with children and adults

Information Date: 10/23/2022

Enrollment: 10/23/2022 - My Fake Organization Coordinated Entry (PHE)

Verified by Project: My Fake Organization CS (ES-88)

Current Living Situation Information

Current Living Situation: Place not meant for habitation

Location Detail:

Record Contact ☒

Contact Service Information

Contact Service: CE - Case Management

Location: My Fake Organization

Comments:

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

Complete Housing Needs Assessment?

Complete Housing Needs Assessment?

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

Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)

OrgCode Consulting Inc. and Community Solutions are the authors of the VI-SPDAT and F-VI-SPDAT. ClientTrack Inc. is licensed to include these tools within ClientTrack. The terms of this license require that users must be trained on the use and implementation of the tool by OrgCode Consulting, Inc. or an approved and certified trainer of ClientTrack. It is not permissible to alter the wording or scoring of the VI-SPDAT or F-VI-SPDAT forms without permission and written consent from Community Solutions and/or OrgCode Consulting, Inc.

Administration

ClientID: 1048333

Interviewer Name: [Redacted]

Date/Time: 10/23/2022 10:00 AM

Assessment Level: Housing Needs Assessment

Enrollment: 10/23/2022 - My Fake Organization Coordinated Entry (PHE)

Assessment Contact Type: -- SELECT --

Agency: ☐ Team ☐ Staff ☐ Volunteer

Interview Location: [Redacted]

Assessment Location: -- SELECT --

Basic Information

Name: Turtle, Leonardo

Nickname: [Redacted]

In what language do you feel best able to express yourself? -- SELECT --

Age at Assessment: 32 Birthdate: 01/01/1990

Has Consented to Participate? ☐ Yes ☐ No

Save

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”.

The screenshot shows the 'Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)' form. The left sidebar contains a navigation menu with options like 'Find Client', 'Coordinated Entry Intake', 'COVID-19 Intake', 'COVID-19 Vaccine Intake', 'Client Dashboard', 'Edit Client', 'Client CE Consent Forms', 'Case Notes', 'Assessments', 'Referrals', 'Enrollments', 'Family Members', and 'Paused Workflows'. The main form area is titled 'Intake (2298)' and 'Leonardo Turtle 1/1/1990 222-22-2222 ClientID: 1048333'. The 'Administration' section is circled in red and includes fields for 'Interviewer Name' (Grant Peters), 'Date/Time' (10/27/2022 10:48:33 AM), 'Assessment Level' (Housing Needs Assessment), 'Enrollment' (10/27/2022 - My Take Organisation Coordinated Entry (PMA)), 'Assessment Contact Type' (In Person), 'Interview Location', and 'Assessment Location' (My Take Organization). The 'Basic Information' section is also circled in red and includes fields for 'Name' (Turtle, Leonardo), 'Nickname', 'In what language do you feel best able to express yourself?' (English), 'Age at Assessment' (32), 'Birthdate' (01/01/1990), 'Has Consented to Participate?' (Yes), and 'Score' (0). A red banner at the bottom states 'IF THE PERSON IS 60 YEARS OF AGE OR OLDER, THEN SCORE 1.'.

The screenshot shows the 'Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)' form, specifically the 'Basic Information' section. The 'Has Consented to Participate?' checkbox is circled in red. The form includes fields for 'Name' (Turtle, Leonardo), 'Nickname', 'In what language do you feel best able to express yourself?' (English), 'Age at Assessment' (32), 'Birthdate' (01/01/1990), 'Has Consented to Participate?' (Yes), and 'Score' (0). A red banner at the bottom states 'IF THE PERSON IS 60 YEARS OF AGE OR OLDER, THEN SCORE 1.'.

A. History of Housing & Homelessness

1. Where do you sleep most frequently? (Check one): ☐ Shelters ☐ Transitional Housing ☐ Safe Haven ☐ Outdoors ☐ Refused ☐ Other (specify)

IF THE PERSON ANSWERS ANYTHING OTHER THAN "SHELTER", "TRANSITIONAL HOUSING" OR "SAFE HAVEN", THEN SCORE 1.

2. How long has it been since you lived in permanent stable housing? # of Years: # of Months: ☐ Refused

3. In the last three years, how many times have you been homeless? ☐ Refused

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

Find Client

Coordinated Entry Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Dashboard

Full Client

Client CE Consent Forms

Case Notes

Assessments

Referrals

Services

Enrollments

Family Members

Paused Workflows

Intake (2298)

Leonardo Turtle 1/1/1990 222-22-2222 ClientID 1048333

Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)

3. In the last three years, how many times have you been homeless? # of Months: Refused

IF THE PERSON HAS EXPERIENCED 1 OR MORE CONSECUTIVE YEARS OF HOMELESSNESS, AND/OR 4+ EPISODES OF HOMELESSNESS, THEN SCORE 1.

B. Risks

4. In the past six months, how many times have you... Refused

a) Received health care at an emergency department/room? Refused

b) Taken an ambulance to the hospital? Refused

c) Been hospitalized as an inpatient? Refused

d) Used a crisis service, including sexual assault crisis, mental health crisis, family/intimate violence, distress centers and suicide prevention hotlines? Refused

e) Talked to police because you witnessed a crime, were the victim of a crime, or the alleged perpetrator of a crime or because the police told you that you must move along? Refused

f) Stayed one or more nights in a holding cell, jail or prison, whether that was a short-term stay like the drunk tank, a longer stay for a more serious offense, or anything in between? Refused

Score:

Save

Search

Find Client

Coordinated Entry Intake

COVID-19 Intake

COVID-19 Vaccine Intake

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Intake (2298)

Leonardo Turtle 1/1/1990 222-22-2222 ClientID 1048333

Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)

g) Stayed one or more nights in a holding cell, jail or prison, whether that was a short-term stay like the drunk tank, a longer stay for a more serious offense, or anything in between? Refused

IF THE TOTAL NUMBER OF INTERACTIONS EQUALS 4 OR MORE, THEN SCORE 1 FOR EMERGENCY SERVICE USE.

Score:

5. Have you been attacked or beaten-up since becoming homeless? Yes No Refused

6. Have you threatened to or tried to harm yourself or anyone else in the last year? Yes No Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR RISK OF HARM.

Score:

7. Do you have any legal stuff going on right now that may result in you being locked up, having to pay fines, or that make it more difficult to rent a place to live? Yes No Refused

IF "YES," THEN SCORE 1 FOR LEGAL ISSUES.

Score:

8. Does anybody force or trick you to do things that you do not want to do? Yes No Refused

9. Do you ever do things that may be considered to be risky like exchange sex for money, run drugs for someone, have unprotected sex with someone you don't know, share a needle, or anything like that? Yes No Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR RISK OF EXPLOITATION.

Score:

C. Socialization & Daily Functioning

10. Is there any person, past landlord, business, broker, dealer, or government group like the IRS that thinks you owe them money? Yes No Refused

11. Do you get any money from the government, a pension, an inheritance, working under the table, a regular job, or anything like that? Yes No Refused

IF "YES" TO QUESTION 10 OR "NO" TO QUESTION 11, THEN SCORE 1 FOR MONEY MANAGEMENT.

Score:

12. Do you have planned activities, other than just surviving, that make you feel happy and fulfilled? Yes No Refused

Save

Search

Find Client

Coordinated Entry Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Dashboard

Full Client

Client CE Consent Forms

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Referrals

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Family Members

Paused Workflows

Intake (2298)

Leonardo Turtle 1/1/1990 222-22-2222 ClientID 1048333

Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)

IF "YES," THEN SCORE 1 FOR LEGAL ISSUES.

Score:

8. Does anybody force or trick you to do things that you do not want to do? Yes No Refused

9. Do you ever do things that may be considered to be risky like exchange sex for money, run drugs for someone, have unprotected sex with someone you don't know, share a needle, or anything like that? Yes No Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR RISK OF EXPLOITATION.

Score:

C. Socialization & Daily Functioning

10. Is there any person, past landlord, business, broker, dealer, or government group like the IRS that thinks you owe them money? Yes No Refused

11. Do you get any money from the government, a pension, an inheritance, working under the table, a regular job, or anything like that? Yes No Refused

IF "YES" TO QUESTION 10 OR "NO" TO QUESTION 11, THEN SCORE 1 FOR MONEY MANAGEMENT.

Score:

12. Do you have planned activities, other than just surviving, that make you feel happy and fulfilled? Yes No Refused

Save

Intake (2298) Leonardo Turtle 222-22-2222 ClientID 1048333

Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)

13. Do you have planned activities, other than just surviving, that make you feel happy and fulfilled? ☐ Yes ☐ No ☐ Refused

IF "NO," THEN SCORE 1 FOR MEANINGFUL DAILY ACTIVITY SCORE: 1

13. Are you currently able to take care of basic needs like bathing, changing clothes, using a restroom, getting food and clean water and other things like that? ☐ Yes ☐ No ☐ Refused

IF "NO," THEN SCORE 1 FOR SELF-CARE SCORE: 1

14. Is your current homelessness in any way caused by a relationship that broke down, an unhealthy or abusive relationship, or because family or friends caused you to become evicted? ☐ Yes ☐ No ☐ Refused

IF "YES," THEN SCORE 1 FOR SOCIAL RELATIONSHIPS SCORE: 1

D. Wellness

15. Have you ever had to leave an apartment, shelter program, or other place you were staying because of your physical health? ☐ Yes ☐ No ☐ Refused

16. Do you have any chronic health issues with your liver, kidneys, stomach, lungs or heart? ☐ Yes ☐ No ☐ Refused

17. If there was space available in a program that specifically serves people that live with HIV or AID, would that be of interest to you? ☐ Yes ☐ No ☐ Client Refused

18. Do you have any physical disabilities that would limit the type of housing you could access, or would make it hard to live independently because you'd need help? ☐ Yes ☐ No ☐ Refused

19. When you are sick or not feeling well, do you avoid getting help? ☐ Yes ☐ No ☐ Refused

20. FOR FEMALE RESPONDENTS ONLY: Are you currently pregnant? ☐ Yes ☐ No ☐ Refused

IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR PHYSICAL HEALTH SCORE: 1

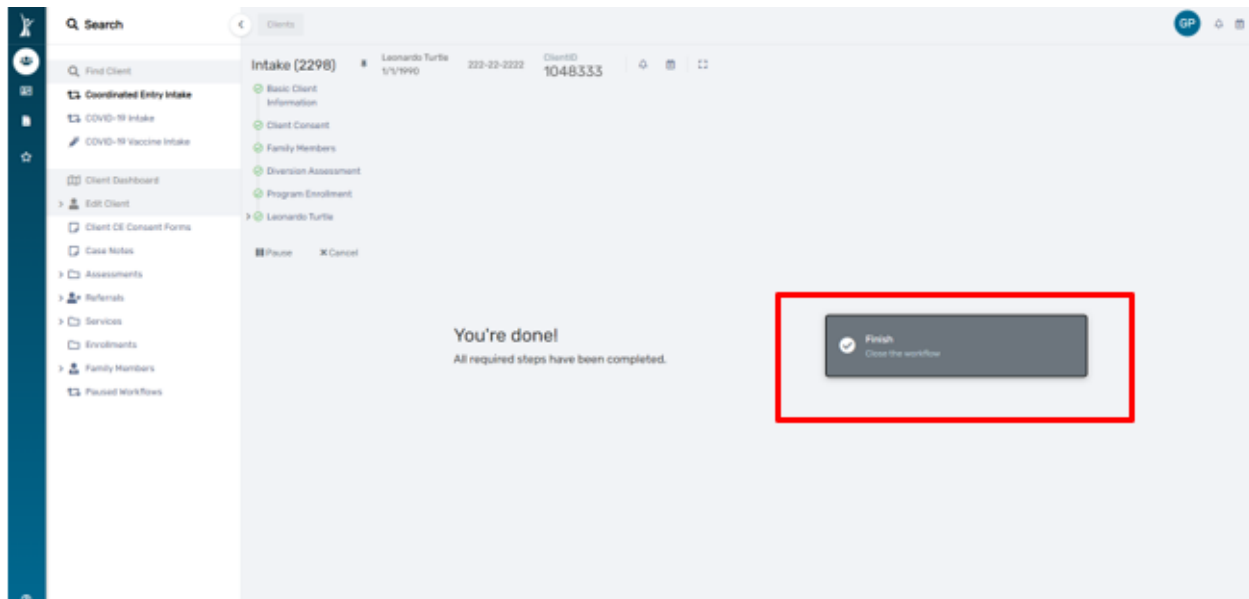
21. Has your drinking or drug use led you to being kicked out of an apartment or program where you were staying in the past? ☐ Yes ☐ No ☐ Refused

22. Has drinking or drug use made it difficult for you to stay housed or afford your housing? ☐ Yes ☐ No ☐ Refused

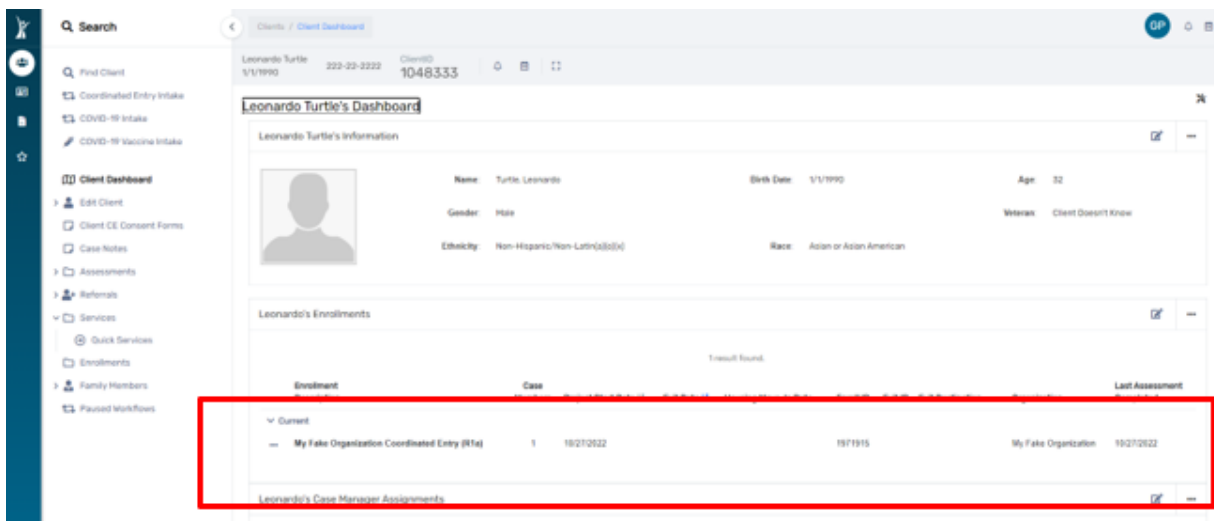
IF "YES" TO ANY OF THE ABOVE, THEN SCORE 1 FOR SUBSTANCE USE SCORE: 1

Save

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



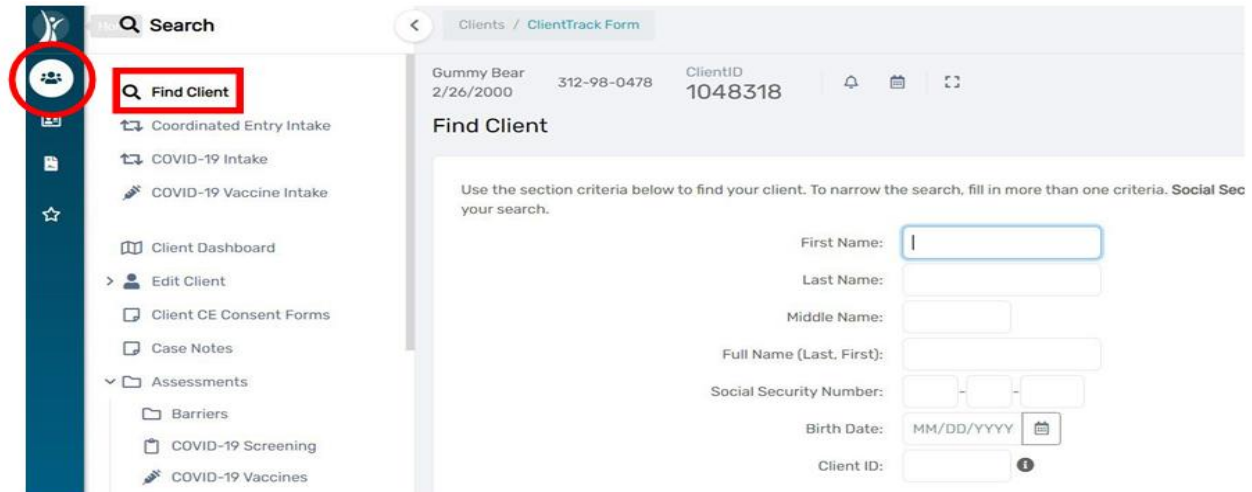
30. The enrollment for Coordinated Entry now appears on the **“Client Dashboard”**



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.”**



Search

Find Client

Coordinated Entry Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Dashboard

Edit Client

Client CE Consent Forms

Case Notes

Assessments

Barriers

COVID-19 Screening

COVID-19 Vaccines

Gummy Bear 2/26/2000 312-98-0478 ClientID 1048318

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Sec your search.

First Name:

Last Name:

Middle Name:

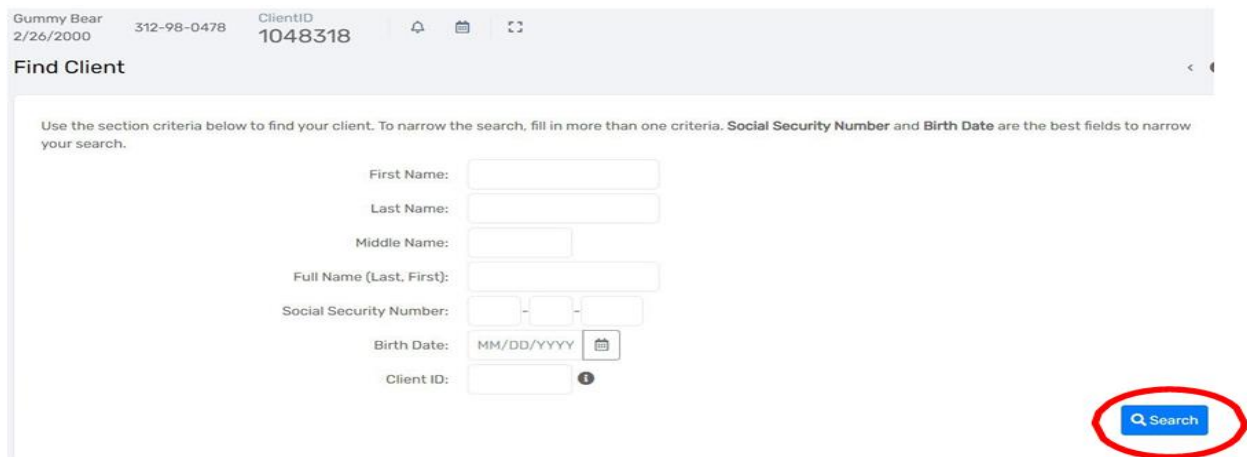
Full Name (Last, First):

Social Security Number:

Birth Date: MM/DD/YYYY

Client ID:

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.



Gummy Bear 2/26/2000 312-98-0478 ClientID 1048318

Find Client

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

First Name:

Last Name:

Middle Name:

Full Name (Last, First):

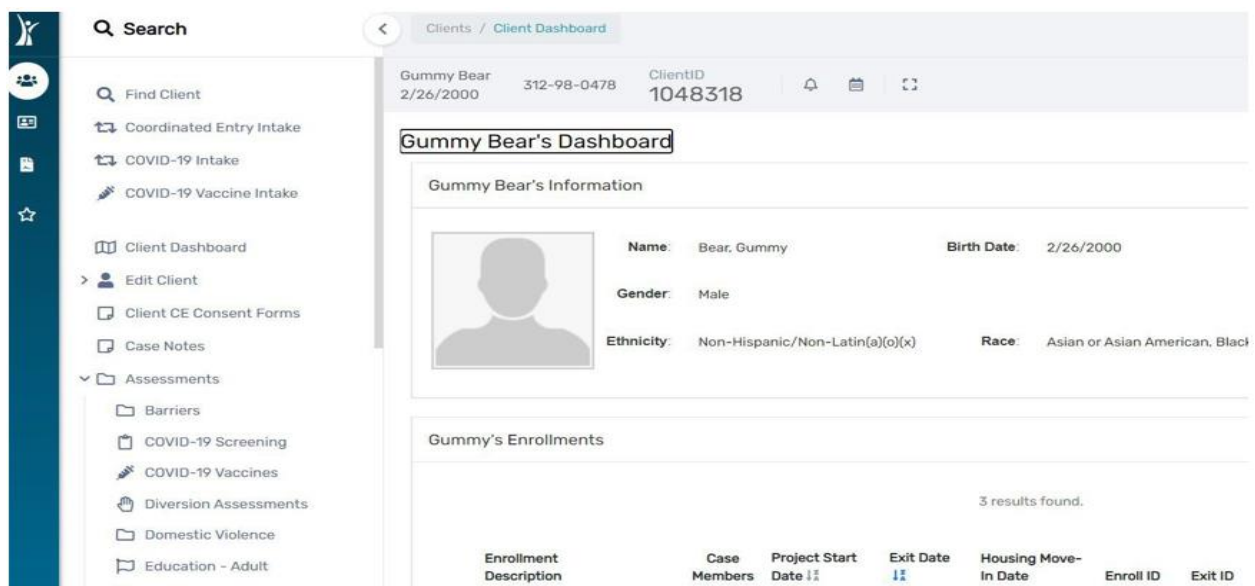
Social Security Number:

Birth Date: MM/DD/YYYY

Client ID:

Search

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



Search

Find Client

Coordinated Entry Intake

COVID-19 Intake

COVID-19 Vaccine Intake

Client Dashboard

Edit Client

Client CE Consent Forms

Case Notes

Assessments

Barriers

COVID-19 Screening

COVID-19 Vaccines

Diversion Assessments

Domestic Violence

Education - Adult

Gummy Bear 2/26/2000 312-98-0478 ClientID 1048318

Gummy Bear's Dashboard

Gummy Bear's Information

Name: Bear, Gummy Birth Date: 2/26/2000

Gender: Male

Ethnicity: Non-Hispanic/Non-Latin(a)(o)(x) Race: Asian or Asian American, Black

Gummy's Enrollments

3 results found.

Enrollment Description	Case Members	Project Start Date	Exit Date	Housing Move-In Date	Enroll ID	Exit ID

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 screenshot shows the 'Assessments' menu on the left sidebar. The 'SPDAT & VISPDAT' category is expanded, showing options: 'VI-SPDAT', 'TAY-VI-SPDAT', and 'ViSpatProgress Report'. The main dashboard area displays 'Gummy Bear's Dashboard' with client information and a table of enrollments.

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.

The screenshot shows the 'VI-SPDAT/F-VI-SPDAT History' screen. It includes a table of assessment results for Gummy Bear. Two buttons are highlighted in red: '+ Add New VI-SPDAT Assessment' and '+ Add New Family-VI-SPDAT Assessment'.

Type	Vulnerability Index Assessment Date	Score General	Score Family	Score History	Score Risks	Score Socialization	Score Wellness	Score Total
Family	11/06/2022 9:30AM	1	4	1	4	2	5	17
Family	06/06/2022	1	4	1	4	3	5	18

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.

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Family Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT) RM

Client refused
Data not collected

PARENT 2

No second parent currently part of the household: ☐

Name: -- SELECT --

IF EITHER HEAD OF HOUSEHOLD IS 60 YEARS OF AGE OR OLDER, THEN SCORE 1.

SCORE: 0

Children

1. How many children under the age of 18 are currently with you? 1 ☐ Refused

2. How many children under the age of 18 are not currently with you? ☐ Refused

Save Cancel

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.