

# Stanislaus County Community System of Care

## HMIS User Data Entry Manual

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*A guide to navigating ClientTrack v. 15, a web-based case management tool, including entering basic client information, fixing common data entry errors and running reports.*

Adopted: April 1, 2017

Amended: February 2021

<http://www.csa-stanislaus.com/hmis/index.html>

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## Contents

Logging into ClientTrack .....	5
Overview of ClientTrack Features.....	6
Home Dashboard .....	6
Home Dashboard (Pinned).....	6
Client Dashboard.....	7
Blue Action Arrow Functions.....	7
Client Dashboard (Pinned) .....	8
Client Record.....	9
Workspace Carousel.....	9
Entering Client Information and Managing Project Enrollment.....	10
Data Entry.....	10
Finding Client.....	10
Workflow for Adding New Client .....	11
Definitions of Basic Client Information .....	12
Adding Project Family Members.....	13
Project Enrollment .....	15
HMIS Universal Data Assessment.....	16
Living Situation.....	16
Health Insurance.....	16
Barriers Assessment.....	17
Domestic Violence Assessment.....	17
Financial Assessment.....	17
Universal Data Assessment for Child.....	18
Barriers Assessment for Child.....	19
Completing Intake Workflow .....	19
Pausing Workflow .....	20
Resume A Paused Workflow.....	20
Finding Client ID.....	21
Unique Project Requirements at Entry.....	21
Rapid Re-Housing (RRH) Enrollment.....	21
Supportive Services for Veteran Families (SSVF) Enrollment.....	22
Veteran Assessment.....	22
Runaway and Homeless Youth (RHY) Enrollment .....	23
Projects for Assistance in Transition from Homelessness (PATH) Enrollment .....	25
PATH Project Enrollment .....	25
Adding Services .....	26

Adding Case Notes .....	28
Adding Referrals .....	30
Referral Outcomes.....	32
Update/Annual Assessment.....	34
Performing Updates (Update) .....	34
Enrollment Assessment .....	35
Master Assessment .....	36
Universal Data Assessment.....	36
Performing Annual Assessment .....	38
Updating Existing Assessment .....	39
Updating PATH Enrollment.....	41
View and Edit Master Assessment .....	42
Exit Enrollments .....	43
Unique Project Requirements at Exit .....	46
Rapid Re-Housing Exit (RRH) .....	46
Runaway Homeless Youth (RHY) Exit .....	48
Projects for Assistance in Transition from Homelessness (PATH) Exit .....	50
Exiting Only One Family Member From Enrollment.....	51
De-Identifying Client.....	54
Submitting Support Issues Internally Through ClientTrack.....	56
HMIS Reports.....	59
Clients in Program.....	59
Service Summary Report .....	61
Emergency Solutions Grant (ESG) CAPER Export .....	64
RHY Export.....	79
SSVF CSV 2020.....	91
Annual Performance Report (APR) .....	104
.....	117
Verifying APR Report Data in Sage HMIS to Generate a Report .....	118
HUD Data Quality Report .....	124
DQ Detail Export.....	126
.....	130
2020 Annual PATH Report .....	131
Key to Asynchronous Tasks .....	137
CES Coordinated Access Data Entry .....	138
Logging into ClientTrack.....	138
Client Data Entry .....	139

Finding/Adding Client.....	139
Adding Family Members .....	141
Project Enrollment .....	143
Universal Data Assessment.....	144
Self-Sufficiency Matrix .....	145
VI SPDAT .....	146
Barriers Assessment .....	148
Domestic Violence.....	148
Financial Assessment (Income Sources and Non-Cash Benefits).....	149
Completing Intake Workflow .....	150
Entering VI-SPDAT or Self-Sufficiency Matrix after HMIS Enrollment is Complete .....	150
What is Viewable Through the Coordinated Access Enrollment?.....	151
CE Assessments.....	151
CE Barriers .....	152
CE Domestic Violence .....	152
CE Enrollments.....	152
CE Financial Assessment .....	153
CE Housing Assessment Disposition at Exit.....	153
CE Release of Information.....	153
CE Self Sufficiency Matrix.....	154
CE VI SPDAT.....	155
CE Universal Data .....	155
Previous Enrollments .....	156
CE Domestic Violence (Not Enrolled) .....	156
CE Master Assessments (Not Enrolled).....	156
CE Barriers (Not Enrolled) .....	156
CE Financial.....	156
CE Self Sufficiency Matrix.....	156
CE VI SPDAT.....	157
CE Universal Data .....	157
If you are Logged into the Wrong Agency for CES Coordinated Access .....	157
How to Scan the Release of Information and VI SPDAT .....	158

# Logging into ClientTrack

Turn off “Pop-up Blockers”

 [Click here to open the application window](#) if it did not automatically open. This message should only appear if you have a pop-up blocker turned on that is preventing ClientTrack from opening the main application window. To bypass it, change your browser settings to allow pop-ups from this site.

1. Passwords are case sensitive
2. Never let your Internet Browser store your login or Password
3. **Remember:** Sharing your User Name and password is **NOT PERMITTED!**



**ClientTrack™**  
Sign In to ClientTrack  
User Name   
Password   
[Did you forget your password?](#)  
→ Sign in

**What's New**  
NHSDC Oct 2019  
9/30/2019  
Eccovia Solutions is excited to attend the National Human Services Data Consortium (NHSDC) Fall Conference, October 15-17, 2019 in Austin, TX. This year's conference will be focusing on preventing and ending homelessness and impacting community systems of care with data. Conference attendees will hear inspiring examples of communities who have successfully used data to transform [...] The post NHSDC Oct 2019 appeared first on Eccovia Solutions.

Florida Coalition for the Homeless  
9/30/2019  
Eccovia Solutions is proud to support the Florida Coalition for the Homeless 2019 Annual Conference Starting Oct 9th, 2019. The conference brings together national, state and local experts from the fields of homelessness, affordable housing, veteran services, healthcare, mental health, and workforce development to explore current best practices on ending homelessness, CoCs across Florida and [...] The post Florida Coalition for the Homeless appeared first on Eccovia Solutions.

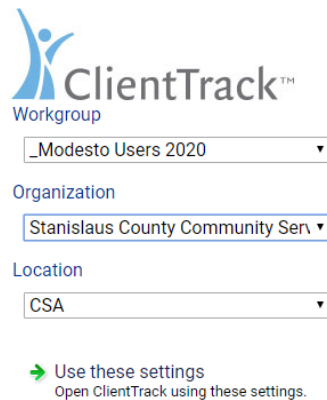
Eccovia Solutions Rolls Out PRAPARE SDoH Screening Tool on its Care Coordination Platform  
9/16/2019  
September 16, 2019 09:00 AM Eastern Daylight Time SALT LAKE CITY--(BUSINESS WIRE)--Eccovia Solutions, the leading provider of flexible, cloud-based case management and community care coordination software for health and human services organizations, today announced the infusion of the PRAPARE SDoH (social determinants of health) capability into the ClientTrack platform. The PRAPARE SDoH screening tool incorporates [...] The post Eccovia Solutions Rolls Out PRAPARE SDoH Screening Tool on its Care Coordination Platform appeared first on Eccovia Solutions.

Visit [EccoviaSolutions.com](http://EccoviaSolutions.com) for more information.  
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**www.clienttrack.net/modesto**

**Workgroup: \_Modesto Users 2020**

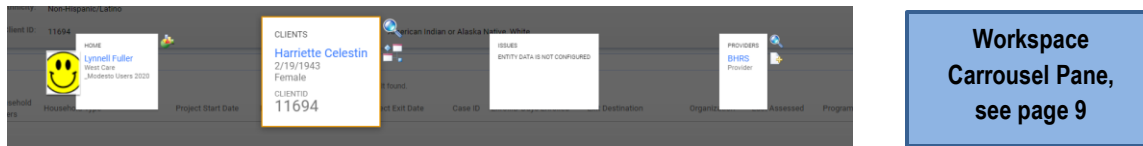
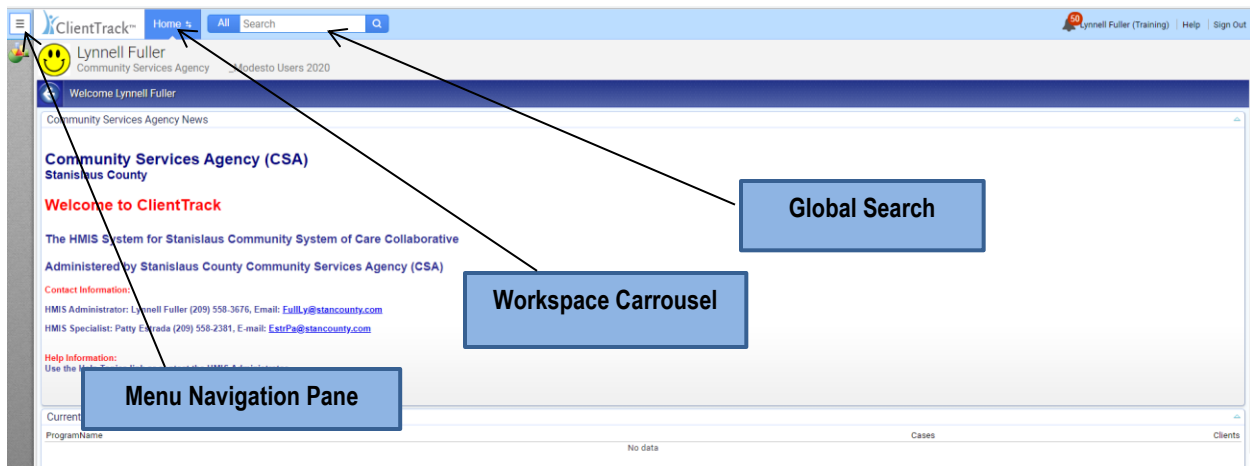
If you have access to more than one organization, it will appear in the Organization dropdown, it is critical that you make sure to change to the correct organization prior to entering data on a client.



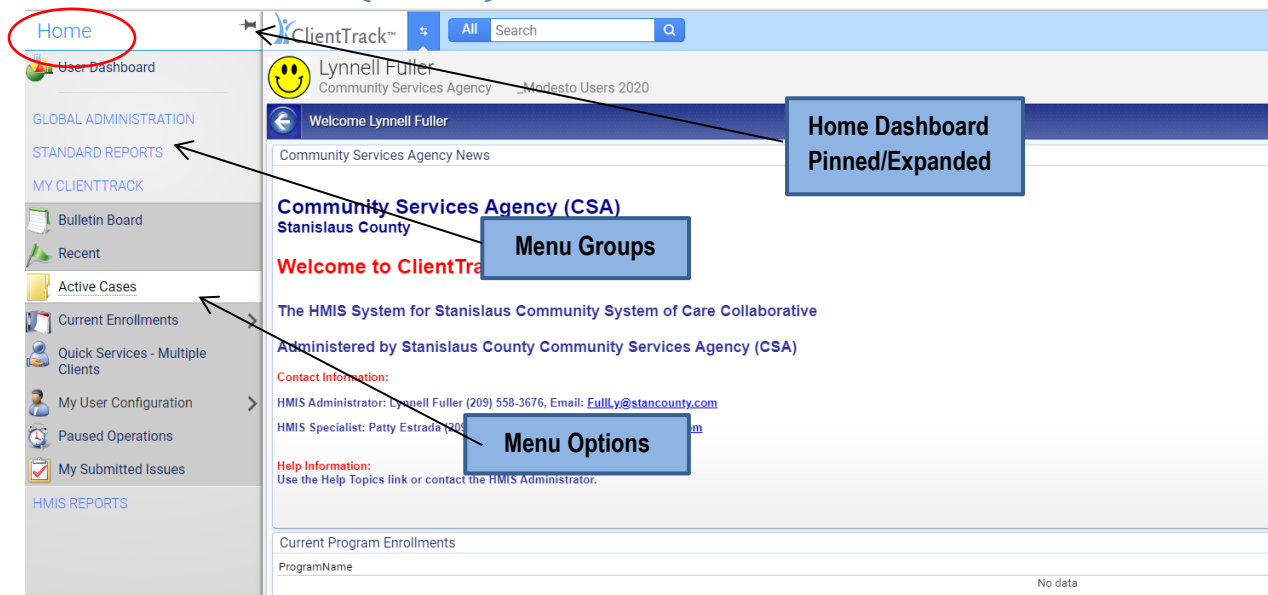
**ClientTrack™**  
Workgroup  
  
Organization  
  
Location  
  
→ Use these settings  
Open ClientTrack using these settings.

# Overview of ClientTrack Features

## Home Dashboard



## Home Dashboard (Pinned)



**Home Dashboard:** This is your “Home Workspace” as a user. Here you can view information specific to you, like your user configuration. Create and run reports, view current enrollments, paused operations, view recent clients and submit issues.

**Menu Navigation Pane:** Collapsed by default.

**Workspace Carrousel:** Allows you to navigate from workspaces with one click and view previous information open or launch specific functions (search for client or start workflows).

**Menu Groups:** Are the Header for what Menu Options are available.

## Client Dashboard

The screenshot shows the ClientTrack interface for Harriette Celestin (Client ID 11694). The dashboard includes a navigation bar, a client profile section, and a table of enrollments. Three blue callout boxes highlight key features: 'Client Family' points to the client's personal information, 'Client Notifications' points to a notification bell icon, and 'Action Arrow' points to a blue arrow icon in the enrollment table.

### Blue Action Arrow Functions

Add Household Member	Add Household Member
Associated Assessments	Associated Assessments
Exit the Enrollment	Missed Annual/Update Assessment
Edit Enrollment	Edit Enrollment
Edit Project Entry Workflow	Edit Project Entry Workflow
Edit Exit Workflow	Edit Exit Workflow
Link Assessments	Link Assessments
Re Enter the Enrollment	Re Enter the Enrollment
Review Entry Assessments	Review Entry Assessments
Update/Annual Assessment	Review Exit Assessments

**Edit Project Entry Workflow:** Only use this to correct any data entry errors, as this will change the baseline data.

**Re-enter the Enrollment:** Use this feature to re-enroll a client who was accidentally exited or for Outreach clients who return prior to 90 days, this option should be used sparingly and is only allowed in certain circumstances. This function will only show after a client is exited.

**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.

**Edit Enrollment:** Only use this function to view all case members associated with enrollment.

**Update/Annual Assessment:** Use the Update/Annual Assessment to conduct annual assessments or capture changes to client's status since enrollment. You will also use this workflow to update an enrollment with a Move-In Date (RRH projects) and Engagement Date/PATH Enrolled Status (Street Outreach/PATH projects).

**Exit the Enrollment:** To exit a client from enrollment, 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.

## Client Dashboard (Pinned)



Search for Client



Intake (Start Workflow)



Client Family Members



Action Arrow



Client Notification

**Search for Client:** You should ALWAYS conduct a search for the client prior to entering a client into the system, remembering the “Less is best” mentality. Start with last 4 or SSN and then search again using ONLY the first few letters of the first/last name and not rely solely on the 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 and remember to search for nicknames such as “Joe” in addition to “Joseph”.

**Intake:** Use this to start the workflow for all enrollments regardless of the funding source (CoC, ESG, RRH, HP, SSVF, RHY, and PATH)

**Action Arrow:** (Blue Action Arrow) Use this to launch the functions you have access to for each enrollment.



## Client Record

The screenshot shows the ClientTrack interface for a client named Kent Baley. The interface includes a search bar at the top, a navigation menu, and several data sections. Callouts point to specific areas: 'Client Referrals' points to the 'Referrals' section (which is empty), 'Client Services' points to the 'Services' section (which is empty), 'Client Demographic Information' points to a red oval containing personal details like Name, DOB, Age, Gender, Ethnicity, and Race, and 'Program Enrollment Information' points to a red oval containing a table of enrollment records.

Enrollment Description	Case ID	Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization	Last Assessment Completed	Program Type
CHS Pathways RHY TLP	1	1	05/10/2015				Center For Human Services	05/10/2017	2
CHSS RRH	1	1	09/20/2017	09/20/2017	11/06/2017	Rental by client, other (...)	Community Housing and Shelter Services	11/06/2017	55

**Client Demographic Information:** Shows the Client Name, DOB, Age, Gender, Ethnicity, and Race

**Program Enrollment Information:** Shows the Enrollment Description (Program you enrolled the client in), How many case members are enrolled, Project Start Date, Housing Move-In Date (if applicable), Program Exit Date, Case ID, EnrollID, Number of Days Enrolled, Exit Destination, Organization, Last Assessment Completed, and Program Type

**Client Referrals and Services:** Any Referrals or Services provided to the client.

## Workspace Carousel

The screenshot shows the Workspace Carousel interface. It features a horizontal scroll bar with icons for 'HOME', 'CLIENTS', 'ISSUES', and 'PROVIDERS'. A callout box points to the 'CLIENTS' icon, stating 'Option to perform function directly from this screen: Find Client or Intake (Start Workflow)'. The carousel displays client information for Harriette Celestin, including her name, DOB, gender, ethnicity, and client ID.

**Workspace Carousel:** Allows you to navigate Right or Left, allows you to click on the icons to directly perform the functions below. Icons include Home, Clients, Issues, Providers, and Reports.

### Home:

- Bulletin Board
- Recent
- Active Cases
- Current Enrollments
- Quick Services - Multiple Clients
- My User Configuration
- Paused Operations
- My Submitted Issues

### Clients:

- CASE MANAGEMENT
- Client Dashboard
- Edit Client
- Living Situation
- Enrollments
- Assessments
- Case Notes
- Referrals
- Family Members
- Services
- Veteran Information
- COORDINATED ACCESS

### Reports:


- BNLS
- HMIS Active Client List
- HMIS BNL Veterans
- HMIS EXPORTS
- HMIS REPORTS
- ADMINISTRATIVE REPORTS
- CLIENT REPORTS
- ENROLLMENT REPORTS
- REFERRAL REPORTS
- REPORTS
- SERVICE REPORTS

# Entering New Project Enrollment

## Data Entry

Make sure you have a signed HMIS ROI (Release of Information) from the Client

#1. Make sure you are on the Client Workspace if you are ready to start entering a client into the system

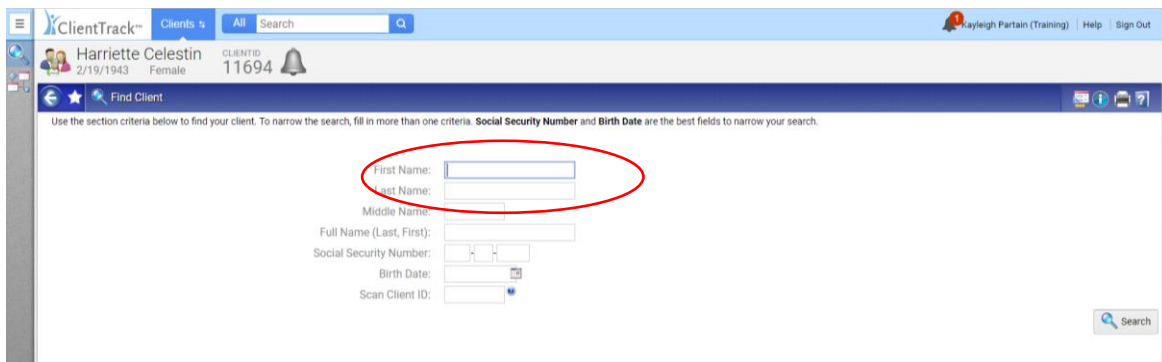
#2. Start by searching for Client, Click Find Client 



## Searching Client

When searching for a client; always remember “Less is best”

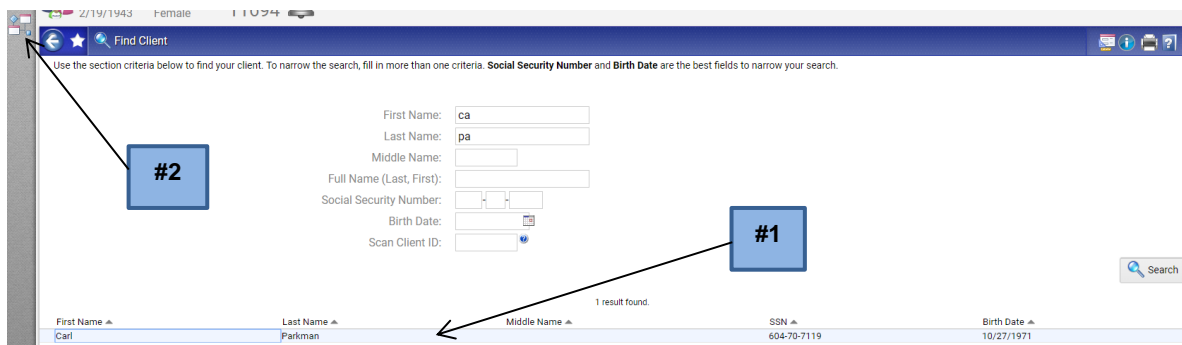
Start by using the last 4 of the SSN and then clear the SSN and try your search using the first two letters of the first & last name to narrow search, then Enter



The system will give a list of names matching your search

#1. If the correct name appears, highlight and click the correct name below or

#2. If the correct name is not listed, Start Workflow using Intake, top left to proceed with client intake Workflow.



## You will then have the option to Add or Use Current Client

- #1. If the client is not in the system click, "Add a new client"
- #2. If the client was found through your search and you clicked on the name, they will appear in the header; only click "Use the current client" if the client's name is showing in the header

The screenshot shows the ClientTrack 15 interface. At the top, the header displays 'Harriette Celestia' with CLIENTID 11694. Below the header, a dialog box titled 'Add or Edit' is open, asking 'Do you want to add a new client or use the selected client?'. The dialog has three buttons: 'Add a new client', 'Use the current client', and 'Select another client'. Callout box #1 points to the 'Add a new client' button, and callout box #2 points to the 'Use the current client' button.


## Workflow for Adding New Client

Enter the information shown: First Name, Last Name, Social Security Number, and Birthdate.

The system will begin by doing another internal search for duplicates

The screenshot shows the 'Client Information' form in ClientTrack 15. The form has fields for First Name, Last Name, Social Security Number, and Birth Date. A red circle highlights a warning message: 'Please address the following: Please review the list below for potential duplicates. Click Next if this is not a duplicate.' Callout box #1 points to the warning message, and callout box #2 points to the 'Next' button.

- #1. The system will let you know of any potential duplicates, verify that this is not a match to an existing client and proceed by clicking next.
- #2. If the correct name does appear, click on the name below to proceed.

When finished, click 

- #1. Starting at the top, complete all required fields \*
- #2. Always make sure if you entered a partial SSN in the search to complete the entire SSN. \*DO NOT, under any circumstance, enter a fake social security number such as 999-99-9999; select the data quality option that best reflects the client's response.
- #3. Enter Date of Birth, Ethnicity, Race, Gender, and Veteran Status
- #4. Under Family Information, Enter the date of the signed ROI under Begin Date
- #5. Once complete, click Finish

The screenshot shows the 'Client Information' form for Harriette Celestin. The form is divided into sections: 'BASIC CLIENT INFORMATION', 'Basic Client Demographics', and 'Family Information'. Five blue boxes with numbers #1 through #5 are overlaid on the form, with arrows pointing to specific fields:

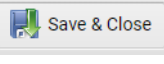
- #1 points to the 'First Name' field (Harriette).
- #2 points to the 'Social Security Number' field (545-99-9248).
- #3 points to the 'Race' dropdown menu, which is open and shows options like 'American Indian or Alaska Native', 'Asian', 'Black or African American', 'Native Hawaiian or Other Pacific Islander', and 'White'.
- #4 points to the 'Begin Date' field in the 'Family Information' section (03/01/2019).
- #5 points to the 'Finish' button at the bottom right of the form.

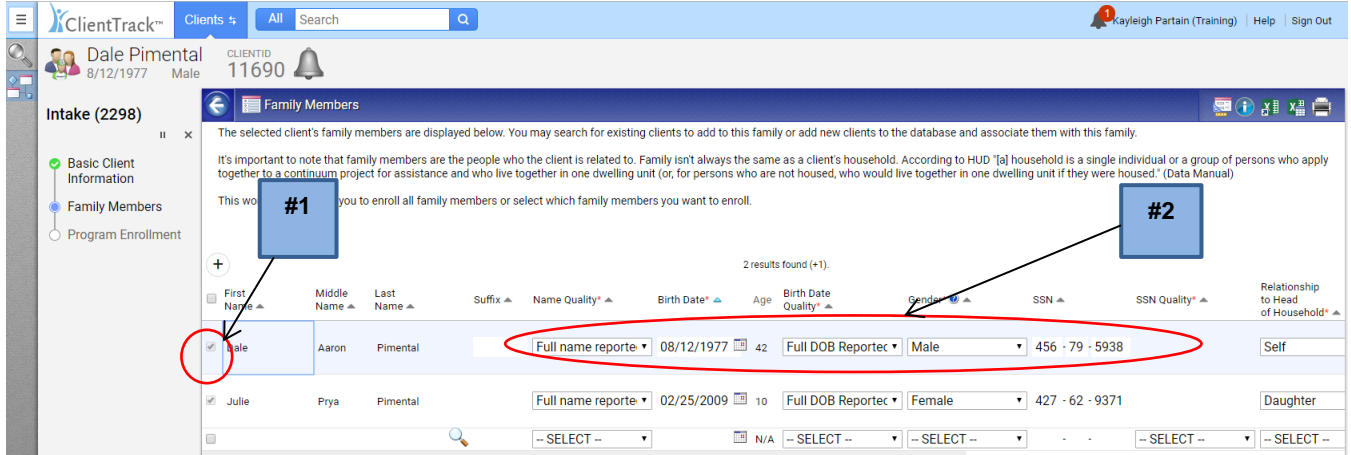
## Definitions of Basic Client Information

- ❖ **First Name:** Legal first name (do not add nicknames in “quotes” because those are not searchable elements). Use Basic English Grammar; do not use all lower or upper case letters.
- ❖ **Last Name:** Legal last name
- ❖ **Middle Name or Middle Initial:** Please include, this helps if possible duplicates are found in the system.
- ❖ **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. Select the data quality option that best reflects the client's response and leave the area blank where numbers would have been entered.
- ❖ **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 multiple races to be checked at once. Click on all that apply.
- ❖ **Gender:** Select the gender with which the client identifies.
- ❖ **Veteran Status:** Select the appropriate response as reported by the client, required for 18 years or older.
- ❖ **Pregnancy Status:** Will only appear for RHY Projects.
- ❖ **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. There can only be ONE Self in each Household.
- ❖ **Begin Date:** Change to the Date that is on the new signed ROI from the Client for enrollment.

## Adding Family Members During Enrollment Process


- #1. To add additional family members, (if they are not already showing), Click on box to add family member
- #2. Making sure you then tab or scroll to far right to complete all fields.

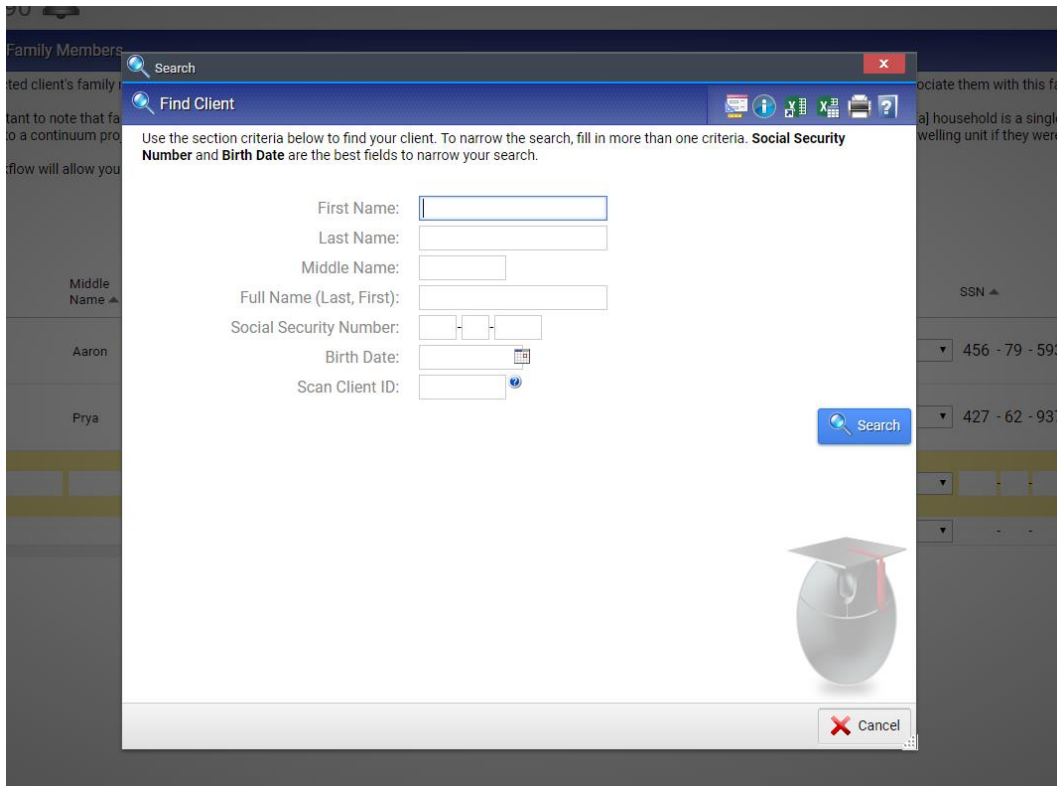
#3. If there are no family members to add, click 



The screenshot shows the 'Family Members' section for client Dale Pimental. The table lists two family members: Dale Pimental (DOB 08/12/1977, Male, SSN 456-79-5938) and Julie Prya Pimental (DOB 02/25/2009, Female, SSN 427-62-9371). The 'Add' button (a plus sign) is circled in red. The 'Full name reported' dropdown for Dale Pimental is also circled in red. Blue boxes labeled '#1' and '#2' indicate the steps described in the text.

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

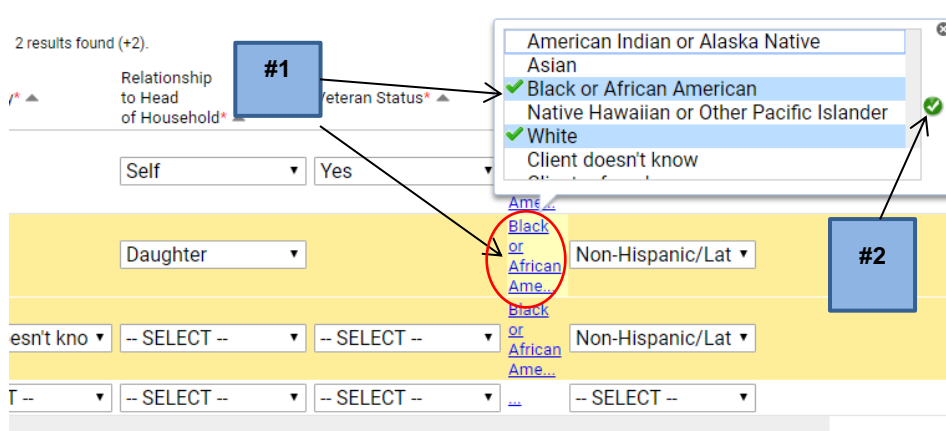
client, click on "Cancel"  in the search window and proceed entering the new household member's information.



The 'Find Client' search window is displayed over the Family Members page. It contains the following fields: First Name, Last Name, Middle Name, Full Name (Last, First), Social Security Number, Birth Date, and Scan Client ID. A 'Search' button is located at the bottom right, and a 'Cancel' button is at the bottom left. A graduation cap icon is positioned at the bottom center of the window.

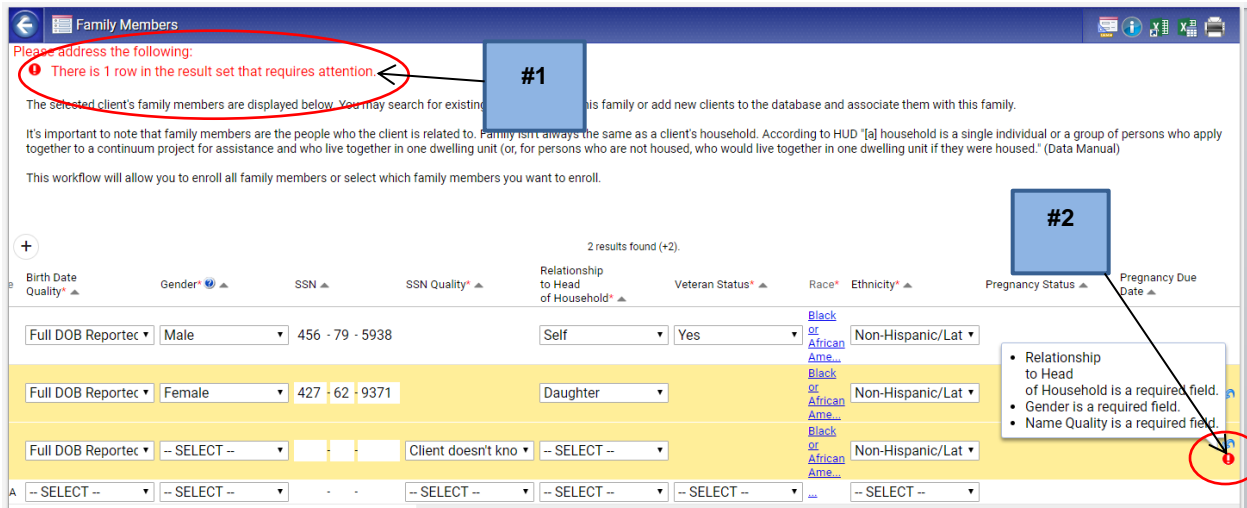
Pay close attention to the Race and Ethnicity fields when adding household members. They will default to the Head of Household selections. If you need to change the Race,

**#1** click on the blue hyperlink and make the necessary change **#2** click on the green circle with the check mark

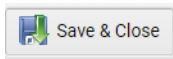


**#1.** If you are alerted to an error after selecting the “Save & Close”

**#2.** Scroll all the way to the right and hover over the red circle with an exclamation point. Go back and address the issue(s) and choose “Save & Close” again.



**Save:** Will save the changes made to the screen and leave you on the same screen.



**Save & Close:** Will save the changes made to the screen and move to the next page.

## Project Enrollment

Projects vary in their data requirements and ClientTrack will prompt you through the workflow to collect all of the required HUD (or other Partner agency) data elements for your specific project. 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.

**#1** Click on the down arrow to choose the Program you wish to enroll the client in.

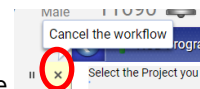
The Project Start Date is:

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

Only projects with a valid HMIS Project Type appear here.  
Due to the large number of conditional data collection elements it is not possible to change a project once the enrollment record has been created.  
While creating the enrollment you will see the project field disabled when household members are selected. The project field can be changed when no household members are selected.

Project:\*

You will only see the options in the drop-down list that your organization has access to or what programs they are set up for. If you do not find your program option when enrolling a client,



**PLEASE DO NOT CONTINUE,** cancel your workflow by clicking the

Contact your HMIS System Administrator (209) 558-3676 or [HMIS@stancounty.com](mailto:HMIS@stancounty.com)

**#1** If your program is listed, choose correct Program and then save.

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.
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Project:\*

**#1.** Click on the box to the left of all persons you want to enroll in this program

**#2.** The date will default to the date of entry, so change if needed by clicking on the date. Then save.

Household - Except from the HMIS Data Standards Manual "A household is a single individual or a group of persons who live together to a continuum project for assistance and who live together in one dwelling unit (oc 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
<input checked="" type="checkbox"/>	Pimental, Dale Aaron	Male	42	WCS SSVF HP	10/02/2019	Kayleigh Partain	Self
<input type="checkbox"/>	Pimental, Julie Prya	Female	10	WCS SSVF HP			-- SELECT --

Callout #1 points to the checkbox for Dale Aaron. Callout #2 points to the Start Date field for Dale Aaron.

## HMIS Universal Data Assessment

- #1. Date will default to date of entry so change if needed. Complete all fields, you can no longer change the type of assessment or program, if it is showing incorrectly, you are not in the correct workflow.
- #2. Type of Residence and Length of stay in the prior living situation.

Intake (1259) | Family Members | HUD Program Enrollment | Universal Data Assessment

Master Assessment Active [Change Assessment Date](#)

Default Client's Last Assessment

Universal Data Assessment Information Date: 09/20/2017

Age at Assessment: 20

Assessment Type: Entry

Disabling Condition: Yes

Client Location - Select or enter the CoC code assigned to the geographic area where the head of household is staying as of the assessment entry.

Client Location: CA-510 - Turlock/Modesto/Stanislaus C

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

Type of Residence: Staying or living in a family member's room, apartment or house

Did you stay less than 7 nights? No

Length of stay in the prior living situation: One month or more, but less than 90 days

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

Covered by Health Insurance: No

Type Status Reason No Other Coverage

Save No Change

## Living Situation

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: Emergency shelter, including hotel or motel paid for with emergency shelter voucher, or RHY-funded Host Home shelter

Length of stay in the prior living situation: -- SELECT --

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: -- SELECT --

Total number of months homeless on the street, in ES, or SH in the past three years: -- SELECT --

Living Situation is conditional questions, depending on the project the client is entering

## Health Insurance

- #1. If you mark yes to "Covered by Insurance", you must have an answer on all in the status field, click box on the top left, which will change all to no.
- #2. Change the one (or more for those who have two or more insurances such as Medicaid and Medi-cal) that should be a yes and then save.

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

Covered by Health Insurance: Yes

Type	Status	Reason No	Other Coverage
Private Pay Health Insurance	No	-- SELECT --	
Medicare	No	-- SELECT --	
Medicaid	No	-- SELECT --	
State Children's Health Insurance Program S-CHIP	No	-- SELECT --	
Veteran's Administration Services	Yes	-- SELECT --	
Employer-Provided Health	No	-- SELECT --	
Health insurance obtained through COBRA	No	-- SELECT --	
Other Public	No	-- SELECT --	
State Funded Insurance for Adults (Medical)	No	-- SELECT --	
Combined Children's Health Insurance / Medicaid Program	No	-- SELECT --	
Indian Health Service (IHS)	No	-- SELECT --	
Other	No	-- SELECT --	
No insurance	No	-- SELECT --	

Save



## Barriers Assessment

Universal Data Assessment > 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.

Assessment Active

Identified Date: 06/01/2019  
 Screen: Special Needs  
 Disabling Condition: Yes

#1

#2

Keep in mind, if the client has a barrier which is Indefinite, they must have disabling condition marked yes

Barrier	Barrier Present?	Condition is Indefinite	Explanation	Previous Barrier Details
Alcohol Abuse	No			Previous Barrier
Chronic Health Condition	Yes	Yes		Previous Barrier
Developmental Disability	No			Previous Barrier
Drug Abuse	No			Previous Barrier
HIV/AIDS	No			Previous Barrier
Mental Illness	Yes	Yes		Previous Barrier
Physical Disability	Yes	Yes		Previous Barrier

#1. If client does not have any barriers, click top left which will mark all as No.

#2. If client has barriers, click the box on the left side, then answer the remaining questions.

\*Note: For Developmental Disability and HIV/AIDS, there will not be a drop-down for "Condition is Indefinite" as this is not a required field per the HMIS Data Standards.

## Domestic Violence Assessment

Assessment Date: 06/01/2019

Domestic Violence Experience:  Yes  
 No  
 Client doesn't know  
 Client refused  
 Data Not Collected

When Experience Occurred: Three to six months ago (excluding six months exactly)

Currently Fleeing: No

Domestic Violence Service Providers (Haven Women's Center) are prohibited from entering client data into HMIS

\*Note: 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, then click "Save" to continue through the workflow.

## Financial Assessment

Intake (2298)

Universal Data Assessment > Domestic Violence Assessment > 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).

Assessment Active

Assessment Date: 06/01/2019  
 Income from Any Source: Yes  
 Non-Cash Benefits from Any Source: No  
 Expenses: --SELECT--

Complete Income and Non-Cash Benefits on all Adults, all children's (under 18) income should be entered into the HOH Income information. You will not complete a separate Financial Assessment for children in the household.

- #1. If yes, then select the source and enter the amount received rounded to the nearest dollar.
- #2. Make a note in Description if child income etc. (Sam \$600.00) for tracking changes
- #3. Scroll down to the Non-Cash Benefits which will only appear below if you answered yes above and select source and enter amount rounded to the nearest dollar
- #4. Save and Close
- #5. **NEVER mark YES** for Income from Any Source and then **NO FINANCIAL RESOURCES**

Assessment Active

Assessment Date: 05/01/2019

Income from Any Source: Yes

Non-Cash Benefits from Any Source: Yes

Expenses: --SELECT--

**#1**

Income

Type	Description	Monthly Amount
<input type="checkbox"/> Earned Income		
<input checked="" type="checkbox"/> Unemployment Insurance		\$800.00
<input checked="" type="checkbox"/> Supplemental Security Income	Sam \$600	\$600.00
<input type="checkbox"/> Social Security Disability Income		
<input type="checkbox"/> Private Disability Insurance		
<input type="checkbox"/> Worker's Compensation		
<input type="checkbox"/> VA Service-Connected Disability Compensation		
<input type="checkbox"/> VA Non-Service-Connected Disability Pension		
<input type="checkbox"/> Pension or retirement income from a previous job		
<input type="checkbox"/> TANF		
<input type="checkbox"/> General Assistance		
<input type="checkbox"/> Retirement (Social Security)		
<input type="checkbox"/> Child Support		
<input type="checkbox"/> Alimony		
<input type="checkbox"/> Other Income		
<input checked="" type="checkbox"/> No Financial Resources		
Count/Total Monthly Income:		2 \$1,400.00

**#2**

**#5**

Non-Cash Benefits

Type	Description	Monthly Amount
<input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants, and Children		
<input checked="" type="checkbox"/> Supplemental Nutrition Assistance Program (SNAP)		\$300.00
<input type="checkbox"/> TANF Child Care Services		
<input type="checkbox"/> TANF Transportation Services		
<input type="checkbox"/> Other TANF-funded Services		
<input type="checkbox"/> Other Source		
<input type="checkbox"/> Section 8- Public Housing- or-Other-Rental-Assistance <sup>1</sup>		
<input type="checkbox"/> Temporary-rental-assistance <sup>1</sup>		
Count/Total Monthly Income:		1 \$300.00

**#3**

**#4**

Save and Close

## Universal Data Assessment for Child

Complete the required data elements for the child on the Assessment. You will notice the child's assessment does not require as much information as the adult's assessment. Answer Disabling Condition and Covered by Health Insurance the same way you would for an adult, then Save.

Master Assessment Active Change Assessment Date

Universal Data Assessment\* 08/06/2019

Information Date: 08/06/2019

Age while in project: 9

Assessment Type: Entry

Disabling Condition: No

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
<input checked="" type="checkbox"/> Private Pay Health Insurance	No	--SELECT--	
<input checked="" type="checkbox"/> Medicare	No	--SELECT--	
<input checked="" type="checkbox"/> Medicaid	No	--SELECT--	
<input checked="" type="checkbox"/> State Children's Health Insurance Program S-CHIP	Yes		
<input checked="" type="checkbox"/> Veterans Administration (VA) Medical Services	No	--SELECT--	
<input checked="" type="checkbox"/> Employer-Provided Health	No	--SELECT--	
<input checked="" type="checkbox"/> Health Insurance obtained through COBRA	No	--SELECT--	
<input checked="" type="checkbox"/> Other Public	No	--SELECT--	
<input checked="" type="checkbox"/> State Funded Insurance for Adults (Medical)	No	--SELECT--	
<input checked="" type="checkbox"/> Combined Children's Health Insurance / Medicaid Program	No	--SELECT--	
<input checked="" type="checkbox"/> Indian Health Service (IHS)	No	--SELECT--	
<input checked="" type="checkbox"/> Other	No	--SELECT--	
<input checked="" type="checkbox"/> No insurance	No	--SELECT--	

Save

## Barriers Assessment for Child

If no Barriers present for child, click to mark all No, then Save & Close.

Assessment Active

Identified Date: 08/06/2019

Screen: Special Needs

Disabling Condition: No

Barrier	Help	Barrier Present?	Condition is Indefinite	Explanation	Previous Barrier Details
Alcohol Abuse		No			Previous Barrier
Chronic Health Condition		No			Previous Barrier
Developmental Disability		No			Previous Barrier
Drug Abuse		No			Previous Barrier
HIV/AIDS		No			Previous Barrier
Mental Illness		No			Previous Barrier
Physical Disability		No			Previous Barrier

Save Save & Close

## Completing Intake Workflow

#1. Make sure to click Finish to complete the Workflow

Intake (2298)

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

Finish the workflow

#1

Always double check the Client's Dashboard when complete for accuracy

- #1. Correct spelling of Name and demographical information
- #2. Correct Project Start Date
- #3. Correct number of Case Members enrolled
- #4. Correct Program

Aimee Banda's Dashboard

Aimee Banda's Information

Name: Banda, Aimee #1 Birth Date: 9/28/1980 Age: 39

Gender: Female

Ethnicity: Hispanic/Latino

Client ID: 11081 Race: White

Aimee's Enrollments

1 result found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Emergency shelter	2	Household with Children and Adults	09/28/2017 #2			8726	11134	827		Family Promise	9/28/2017	1

#3

#4

**YOU HAVE COMPLETED YOUR ENROLLMENT!**

## Pausing Workflow

Please pay special attention to the process/workflow you are completing. Should you be interrupted during workflow process, you may “Pause” a workflow by clicking on the pause button located in the upper right-hand corner of the workflow menu beside the black X. The pause feature will allow you to pause the workflow at any time so you can return to it later

The screenshot shows the ClientTrack interface for client Dale Pimental (CLIENTID 11690). The 'Pause the workflow' button is circled in red. Below the button, a table lists family members:

First Name	Middle Name	Last Name	Suffix	Name Quality	Birth Date	Age	Birth Date Quality	Gender	SSN	SSN Quality	Relationship to Head of Household
Dale	Aaron	Pimental		Full name reported	08/12/1977	42	Full DOB Reported	Male	456 - 79 - 5938		Self
Julie	Prya	Pimental		Full name reported	02/25/2009	10	Full DOB Reported	Female	427 - 62 - 9371		Daughter

. The System will let you know that you have **Paused** your workflow successfully.

The screenshot shows a confirmation message: "The workflow was paused successfully!". The message is circled in red. The interface also shows the 'Pause the workflow' button with a pause icon.

## Resume A Paused Workflow

The screenshot shows the 'Paused Operations' section of the ClientTrack interface. A blue callout box contains the text: "Resume Paused Workflow: HOME Workspace>My ClientTrack>Paused Operations". The 'Paused Workflows' table is visible below:

Identification	Form Description	Step	Time Paused
Pimental, Dale Aaron	HMIS 2014 Program Data		
estin, Harriette	HMIS 2014 Program Data		

Resume the Workflow

Restart the Workflow

Exit the Workflow

## Finding Client ID

Starting at the Client's Dashboard the Client ID is visible in two locations, next to the client's name on the upper left area and in the Client Information section beneath Ethnicity.

The screenshot shows the Client Dashboard for Dale Pimental. At the top left, the client's name "Dale Pimental" is displayed next to the Client ID "11690", which is circled in red. Below this, the "Dale Pimental's Information" section contains a grid of fields: Name (Pimental, Dale Aaron), Birth Date (8/12/1977), Gender (Male), Ethnicity (Non-Hispanic/Latino), Client ID (11690, circled in red), and Race (Black or African American, White).

## Unique Project Requirements at Entry

There are variations in data requirements for different project enrollments. In the following section are screenshots of project enrollments and their unique requirements during the Intake workflow for the following projects.

1. Rapid Rehousing Enrollment (RRH)
2. Supportive Services for Veteran Families Enrollment (SSVF)
3. Runaway and Homeless Youth Enrollment (RHY)
4. Projects for Assistance in Transition from Homelessness (PATH) Enrollment

### Rapid Re-Housing (RRH) Enrollment

In addition to the previous assessments outlined earlier in this manual, the RRH enrollment will require documentation of a client's "Date of Move in," as seen below.

**Project Entry Date:** Date client/household is admitted into the RRH project.

**Date of Move-In:** When you complete an Update/Annual Assessment and are adding that the household is now in permanent housing, you will be required to add the Date of Move-In. You should use the date the **client actually takes occupancy** of the unit. The Date of Move In should not be projected or added as the date the lease is signed.

**\*Note:** you are not required to enter the Date of Move-In at entry in the event you do not have a date, keeping in mind, a Move-In Date must be entered before you exit the client or you will not receive a positive outcome (see update/annual assessment to add after enrollment)

The screenshot shows the HUD Program Enrollment form in ClientTrack. The form includes instructions for selecting the Project Start Date and lists requirements for admission. The "Project" field is set to "FP RRH". Below the instructions, the "Household" section provides a definition. At the bottom, a table lists client information, with the "Housing Move-In Date" field circled in red.

Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household	Housing Move-In Date
Fleming, Steve Victor	Male	30	08/19/2019	Student 17	Self	

# Supportive Services for Veteran Families (SSVF) Enrollment

Make Sure the Veteran Status is marked Yes for the HOH

Gender: \* Male  
Veteran Status: \* Yes

Make sure to enter the Household Income as a Percentage of AMI, and VAMC Station Number

Disabling Condition: \* No  
Household Income as a Percentage of AMI: \* Less than 30%  
VAMC Station Number: \* (640) Palo Alto, CA

You are required to add the Client's Full Address Prior to Entry

**Address Prior to Entry** - Address prior to entry is required by the VA and should be collected for programs funded by VA grants (e.g. SSVF). Use the fields in this section to record the street address, city, state, and ZIP code of the apartment, room, or house where the client last lived for 90 days or more. Addresses of emergency shelters should NOT be recorded here.

Address Prior To Entry Quality: \* Full address reported  
Address: \*  
Address 2:  
City, State, Zip Code: City State Zip Code

## Veteran Assessment

For all Head of Household Veterans

Universal Data Assessment > Veteran Information

The Veteran information is used to collect details about the veteran's service.

**Branch and Discharge Status** - Please select the branch and discharge status. The HMIS Data Manual provides the following instructions for veterans with 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, select the most current status.

Branch of the Military: \* Navy  
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: \* 11/24/1941  
Service Exit Date: \* 11/26/1971

Please Select Theatre(s) of Operation(s)

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

If you do not know the exact full date of Entry and Exit from Service use 01/01 and the year

Save

## Connection with SOAR

Connection with SOAR: \* -- SELECT --

## HP ONLY SSVF Homelessness Prevention Assessment

SSVF Homelessness Prevention

**Assessment Active**

Assessment Date: \* 10/02/2019

Referred by Coordinated Entry or a homeless assistance provider to prevent the household from entering an emergency shelter or transitional housing or from staying in a place not meant for human habitation:  Yes  No

Current housing loss expected within: \*  0-6 Days  7-13 Days  14-21 Days  More than 21 days

Current household income is \$0: \*  Yes  No

Annual household gross income amount: \*  0-14% of Area Median Income for household size  15-30% of AMI for household size  More than 30% of AMI for household size

Sudden and significant decrease in cash income (employment and/or cash benefits) AND/OR unavoidable increase in non-discretionary expenses (e.g., rent or medical expenses) in the past 6 months:  Yes  No

Major change in household composition (e.g., death of family member, separation/divorce from adult partner, birth of new child) in the past 12 months:  Yes  No

Rental Evictions within the Past 7 Years: \*  4 or more rental evictions  2-3 prior rental evictions  1 prior rental eviction  None

Currently at risk of losing a tenant-based housing subsidy or housing in a subsidized building or unit:  Yes  No

History of Literal Homelessness (street/shelter/transitional housing): \*  4 or more times or total of at least 12 months in the past three years  2-3 times in past three years  1 time in the past three years  None



### Education Assessment:

Highest Grade Completed : \* -- SELECT --

Secondary Education :

- Associates Degree
  - Bachelors Degree
  - Masters Degree
  - Doctorate Degree
  - Other graduate/Professional degree
  - Vocational certification / Certificate of advanced training or skilled artisan

## Runaway and Homeless Youth (RHY) Enrollment

### Basic Center Program (BCP)

(For Basic Center Program-Emergency Shelter Programs Only)

The RHY-BCP status occurs at the point which eligibility for FYSB has been determined. The status date may be on or after the project entry date. If no is marked, then you must provide a reason.

**RHY - BCP - Status** - Collect once at project start for each stay. This element is required to be completed before project exit.

Date Status Determined: \* 10/02/2019

Youth Eligible for RHY Services: \* No

Reason why services are not funded by BCP grant: \* -- SELECT --

-- SELECT --

Out of age range




Ward of the State - Immediate Reunification

Ward of the Criminal Justice System - Immediate Reunification




Other



If yes, then choose Yes for Runaway Youth and Save

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





Date Status Determined: \* 10/02/2019   
Youth Eligible for RHY Services: \* Yes   
Runaway Youth: \* Yes 

### Employment Assessment:







Assessment Date: \* 10/02/2019   
Employed? \* Yes   
Type of Employment: \* Part-Time 

Assessment Date: \* 10/02/2019   
Employed? \* No   
Why Not Employed : \* -- SELECT --  
-- SELECT --  
Looking for work  
Unable to work  
Not looking for work

### Education Assessment:

Assessment Date: \* 09/13/2019   
Highest Grade Completed : \* No School Completed   
School Status: \* Attending school regularly   
Secondary Education :  
Associates Degree  
Bachelors Degree  
Masters Degree  
Doctorate Degree  
Other graduate/Professional degree  
Vocational certification / Certificate of advanced training or skilled artisan 









### Health Assessment:

Assessment Date: \* 10/02/2019   
General Health Status: \* Good   
Dental Health Status: \* Good   
Mental Health Status: \* Fair   
Pregnancy Status: \* Yes   
Pregnancy Due Date: \* 

\*Note: If pregnant, Pregnancy Due Date must be entered.

### RHY Entry Assessment:

Assessment Date: \* 10/02/2019   
Sexual Orientation: \* Heterosexual   
Referral Source: \* Self-Referral 

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



## RHY Entry Assessment Juvenile Justice System and Child Welfare/Foster Care

<input checked="" type="checkbox"/> System ▲	Formerly a Ward Of:* ▲	Number of Years ▲	Number of Months (1-11) ▲
<input checked="" type="checkbox"/> Child Welfare/Foster Care Agency	No		
<input checked="" type="checkbox"/> Juvenile Justice System	Yes	Less than one year	3

Answer all questions

Must Mark both

## Projects for Assistance in Transition from Homelessness (PATH) Enrollment

### PATH Project Enrollment

- #1. Click on the box to the left of all persons you want to enroll in this program
  - #2. The date will default to the date of entry, so change if needed by clicking on the date
  - #3. Make sure you add the Date of Engagement, Date PATH Status Determined, Client became enrolled in PATH, and if NO, Reason not enrolled in PATH, then click Save
- \*Note:** You can close this section without Date of Engagement

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 into a permanent housing project, the following factors have been met:
  - 1) Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client must be homeless long enough to qualify – though all documentation may not yet have been gathered);
  - 2) The client has indicated they want to be housed in a permanent project. The expectation is the project has a housing opening (on-site, site-based, scattered-site);
  - 3) The client is able to access services and supports.

Project: PATH Street Outreach

Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household*	Date of Engagement*	Date PATH Status Determined	Client became enrolled in PATH	Reason not enrolled in PATH
<input checked="" type="checkbox"/> Southern, Kelvin Michael	Male	57	10/02/2019	Kayleigh Partain	Self				--SELECT--

### PATH Universal Data Assessment

- #1. Date will default to project start date, if it is incorrect, you must change the enrollment date. Complete all fields. You are not able to change the type of assessment or Program; if it is showing incorrect, you are not in the correct workflow.
- #2. Make sure you complete all areas that are marked with \* these are mandatory fields and the system will not advance without them being complete.

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:\* 10/02/2019

Age at Assessment: 57

Assessment Type: Entry

Assessor:\* Kayleigh Partain

Program: PATH Street Outreach

Disabling Condition:\* --SELECT--

## SOAR Connection (SOAR: SSI/SSDI Outreach, Access, and Recovery)

Assessment Date: \* 10/02/2019  
Connection with SOAR: \* Yes

### PATH Barriers Assessment

Make sure if Disabling Condition is Yes that you have a marked a Barrier and if the Condition is Indefinite.

Assessment Active

Identified Date: \* 10/02/2019  
Screen: Special Needs  
Disabling Condition: Yes

Barrier	Barrier Present?	Condition is Indefinite	Explanation	Previous Barrier Details
Alcohol Abuse	No			
Chronic Health Condition	No			
Developmental Disability	No			
Drug Abuse	No			
HIV/AIDS	No			
Mental Illness	Yes	Yes		
Physical Disability	Yes	Yes		

### PATH Contact, Current Living Situation

Domestic Violence Assessment > Income and Sources, Non-Cash Benefits > 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: \* 10/02/2019  
Enrollment: \* 10/02/2019 - PATH Street Outreach

Living Situation Information

Living Situation: \* Place not meant for habitation  
Location Detail:   
Record Contact:

## Adding Services

Currently RRH, SSVF, RHY, and PATH projects are required to enter services into HMIS. If you operate one of those projects, after completing an enrollment for a client, you can document services associated with the project enrollment two ways:

**#1. From Client Workspace, on Client Dashboard click Client's Services**

ClientTrack - Clients 4 | Search

Kelvin Southern | CLIENTID 11697 | 11/28/1961 | Male

Kelvin Southern's Information

Name: Southern, Kelvin Michael | Birth Date: 11/28/1961 | Age: 57  
Gender: Male  
Ethnicity: Non-Hispanic/Latino  
Client ID: 11697

Kelvin's Enrollments

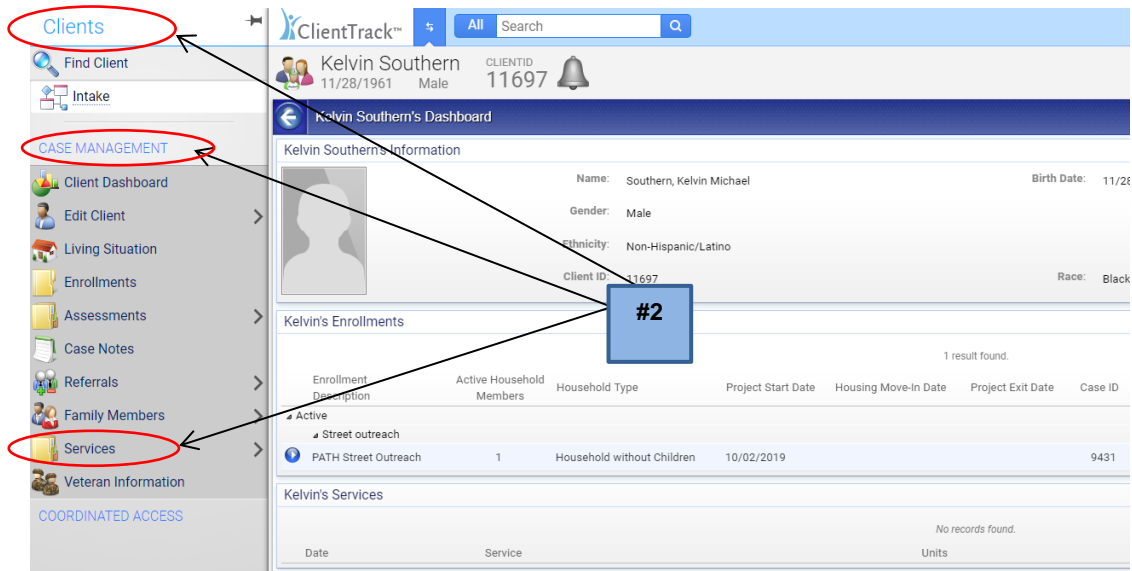
Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Street outreach												
PATH Street Outreach		Household without Children	10/02/2019			9431	11963	0		BHRS	10/2/2019	4

Kelvin's Services

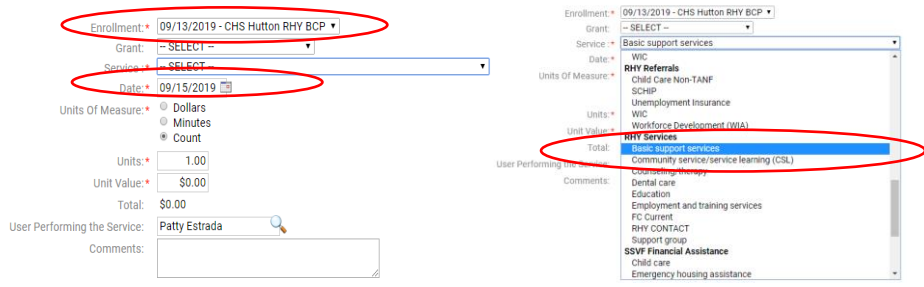
No records found.

§ Total Organization

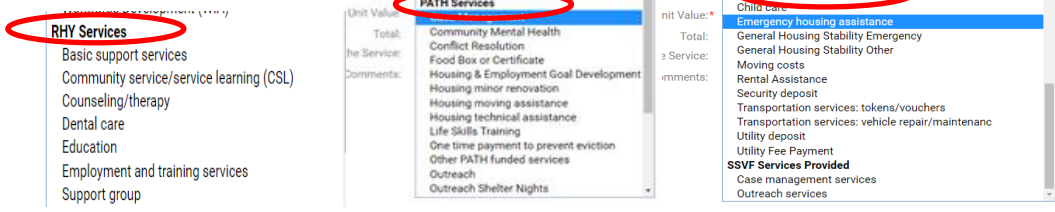
#2. From Client Workspace > Open Menu Navigation > Case Management > Services



#3 Click Add New, then Choose Enrollment and Service



Make sure to scroll down to view the services under your correct project type



The date will default to the date you are entering the service, make sure you change if needed. If the enrollment is already closed, you will not see an option under Enrollment, make sure you change the service date to a date during the active enrollment or you will get "Option not in the list" and the service won't be attached or show up on Federal Reports.

**\*Note:** Change the service date first so the active enrollments will accurately show and you can visually see it is attached.

Enrollment: \* Option not in the list    Enrollment: \* 09/13/2019 - CHS Hutton RHY BCP

Income	Family Income	Family Members	Poverty Level	% of Poverty
\$192.00	\$192.00	1	\$1,040.83	18.45 %

Family Income:

Enrollment: \* 10/02/2019 - PATH Street Outreach  
 Grant: -- SELECT --  
 Service: \* Case Management  
 Staying on Streets, ES or SH: \* -- SELECT --    Location: BHRS-PATH  
 Date: \* 10/02/2019  
 Units Of Measure: \*  Dollars  Minutes  Count  
 Units: \* 1.00  
 Unit Value: \* \$0.00  
 Total: \$0.00  
 User Performing the Service: Kayleigh Partain  
 Comments:

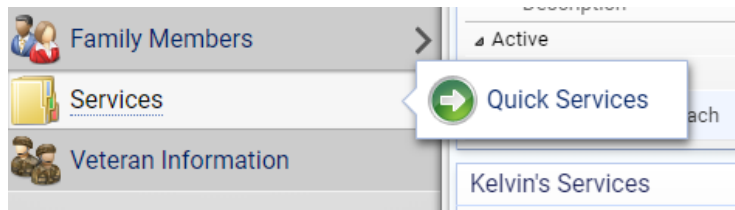
**For PATH ONLY you will get staying on the streets...**

**For Security Deposits or any financials; add the CK numbers & amounts in the Comments field (CK#1111 \$700.00)**

**Service Complete**

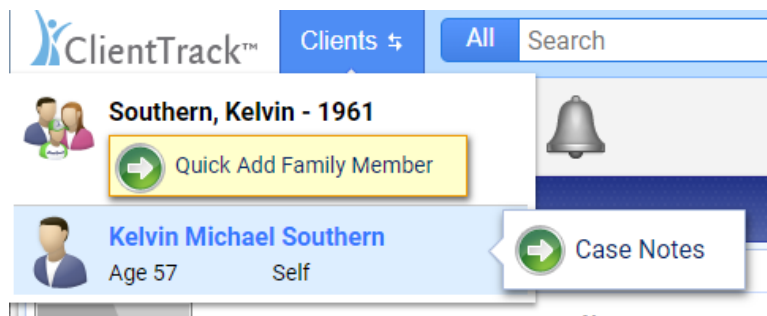
Kelvin's Services				
Date	Service	Units	\$ Total Organization	
10/02/2019	Case Management	1.00	\$0.00 BHRS	

**For Quick Services: >Clients>Case Management>Services>Quick Services**



### Adding Case Notes

To add case notes, make sure client's name is in the header, from the Dashboard, click on the family picture and then slide over to the Case Notes.

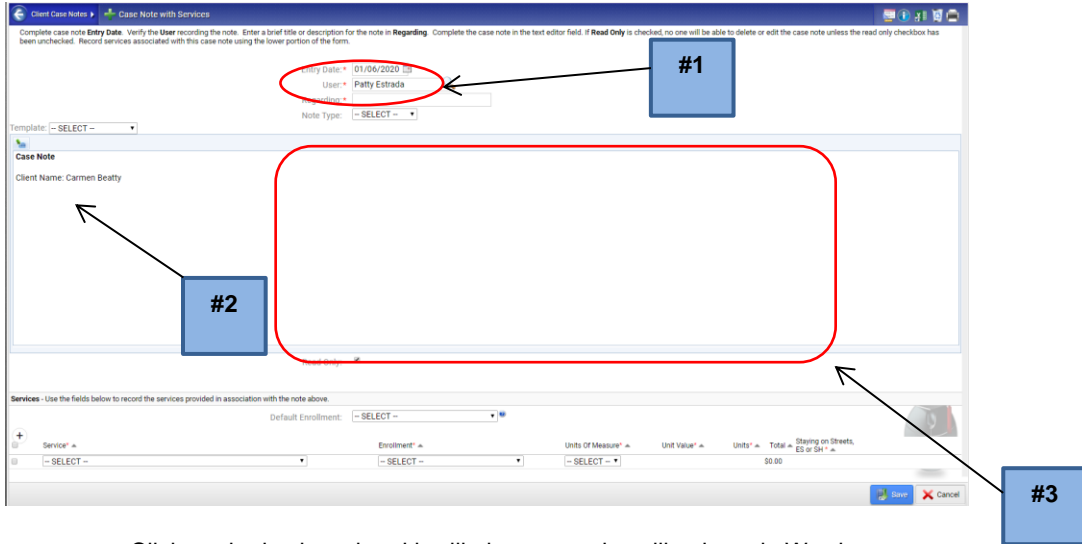


Add New Case Note

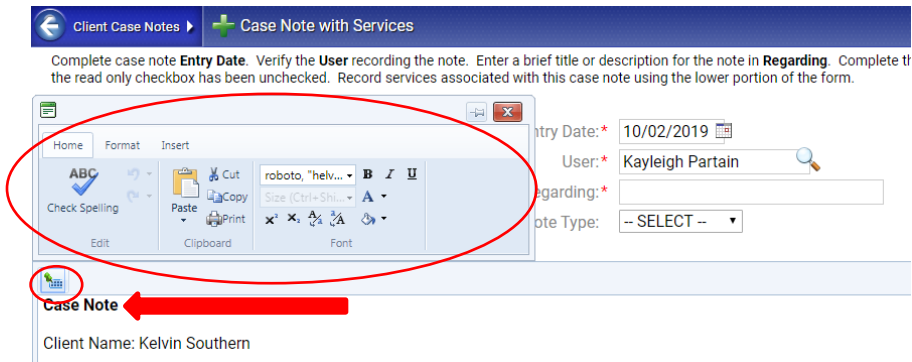
#1. Complete the Entry Date and Regarding Sections

#2. The Client Name is defaulted

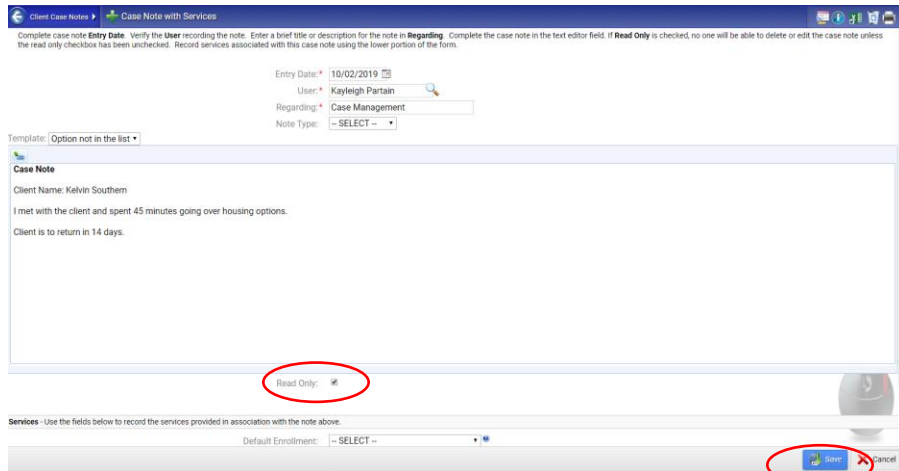
#3. You can copy and paste in the body of the note



Click on the keyboard and it will give you options like those in Word



Always make sure you check **READ ONLY**, then you can **Save** (Read Only doesn't allow anyone to change your note, only to view it) then Save



You can then go back to your note to **view, edit, or print**

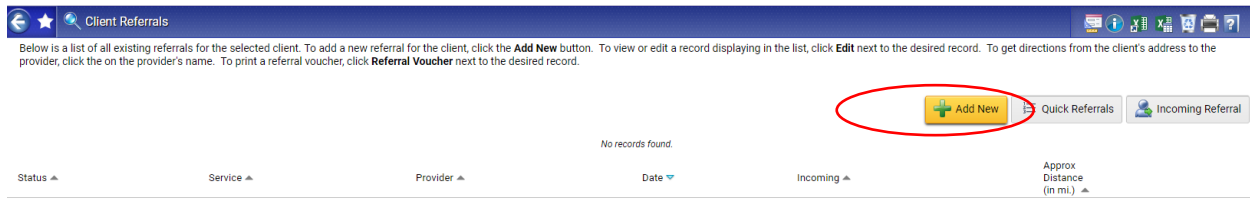
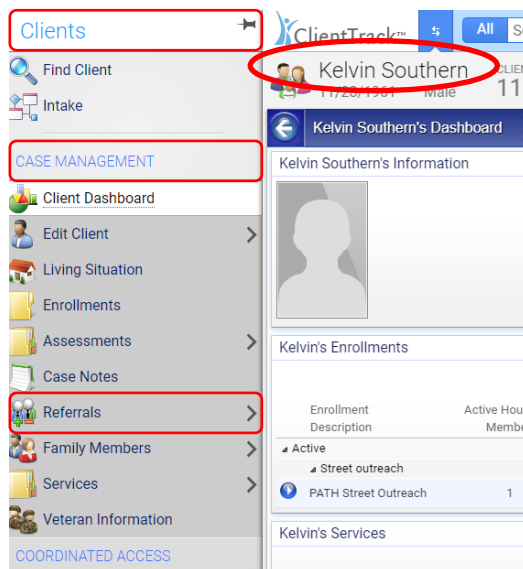



**\*Note:** Any case notes created for a client are restricted to case managers within your organization. No one outside of your agency can view your case notes.

## Adding Referrals

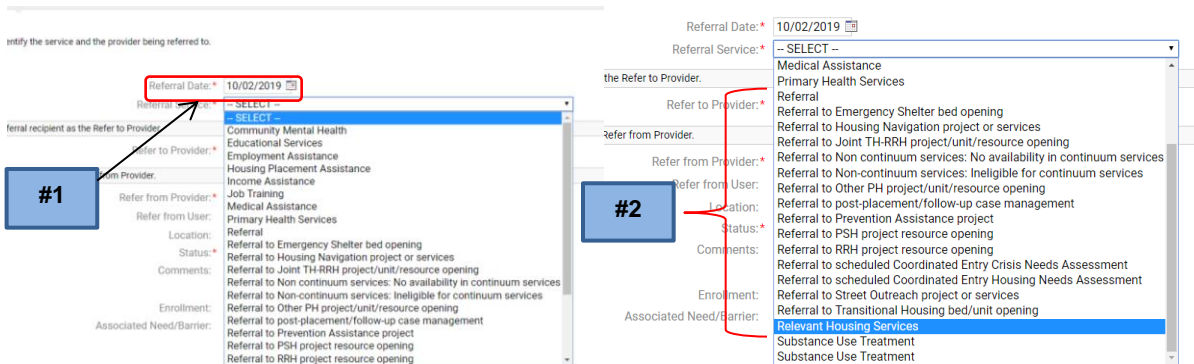
Currently only PATH projects are required to enter and track Referrals in HMIS.

#1. Client is showing in the header>menu navigation tab>Case Management>Referrals



On Referrals screen click 

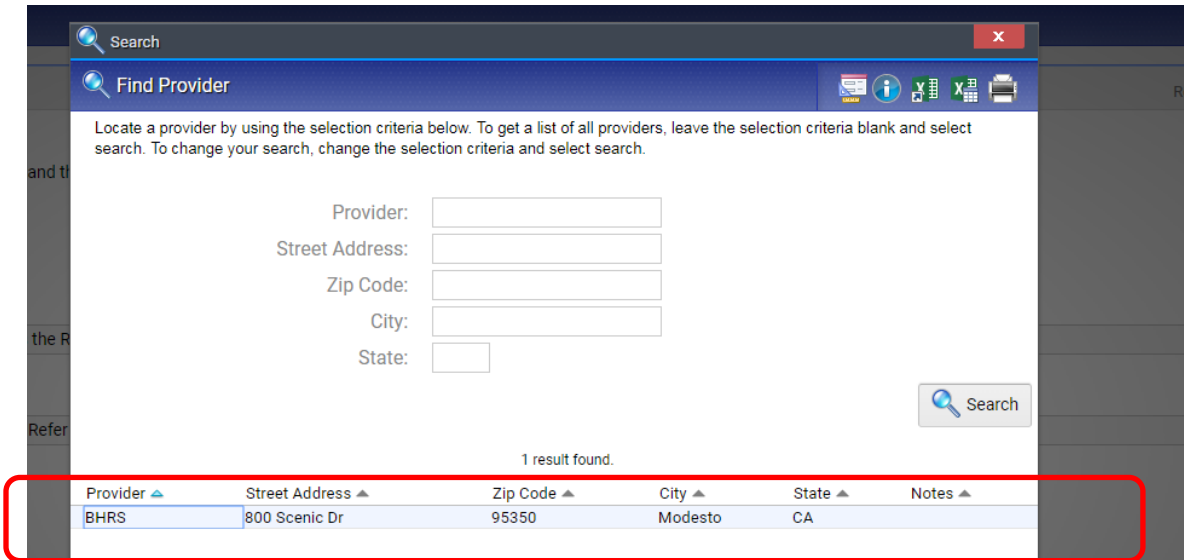
- #1. Make sure you change the Referral Date to the date the referral was made
- #2. Select Referral Service, you will get a drop down of the Referral Services that are set for your agency in the drop down list.



Refer to Provider: \*  

Click on the Magnifying Glass for "Refer to Provider"

Only Providers who provide that service will be shown, click on the one you want to refer the client to.



Select Results and **You MUST ADD an ENROLLMENT**, even though it is not showing mandatory, or it will not report correctly unless you attach an enrollment to the Referral, then select Next.

Client Referrals > Referral

Referral

REFERRAL

Complete the information below to identify the service and the provider being referred to.

Referral Date: 10/02/2019

Referral Service: Employment Assistance

Referral Recipient - Select the agency referral recipient as the Refer to Provider.

Refer to Provider: BHRS

Referral Source - Select the agency referral source as the Refer from Provider.

Refer from Provider: BHRS

Refer from User: Kayleigh Partain

Location: BHRS PATH

Status: Referral Made

Comments:

Enrollment: 10/02/2019 - PATH Street Outreach

Associated Need/Barrier: --SELECT--

Next Cancel

Leave the Voucher and Information Release blank. Do not check the boxes.

Client Referrals > Referral

VOUCHER AND INFORMATION RELEASE

Voucher Information - Please complete the following information if your organization has authorized a voucher for this service.

Voucher is Authorized:

Information Release - If the Client has authorized that his/her information can be released to the selected provider, please indicate this below. Doing so will cause an email to be automatically generated and sent to this provider with information regarding the referral.

Email Authorized:

Previous Next Cancel

## Referral Outcomes

For RHY: You can set the outcome as Information Only, you may also add any comments.

Client Referrals > Referral

REFERRAL OUTCOME

Outcome Information - Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.

Date Acknowledged: 10/02/2019

Appointment Date: 10/02/2019 AM

Result Date:

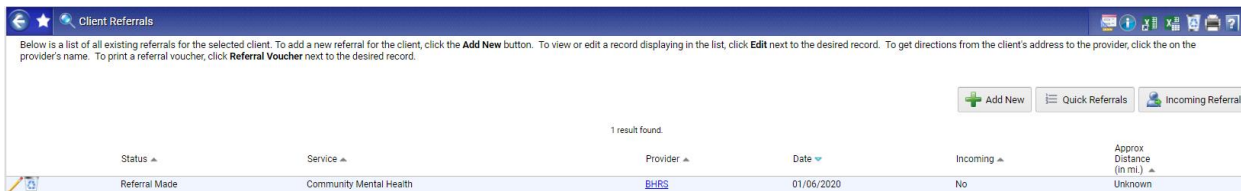
Result: --SELECT--


Comments:

Finish



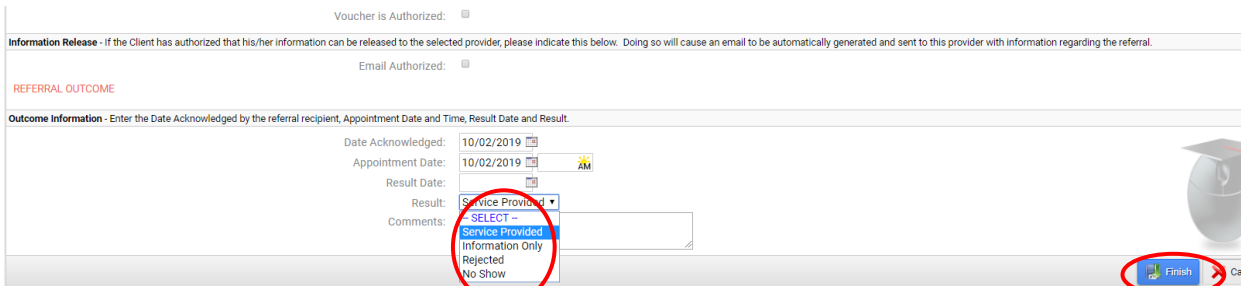
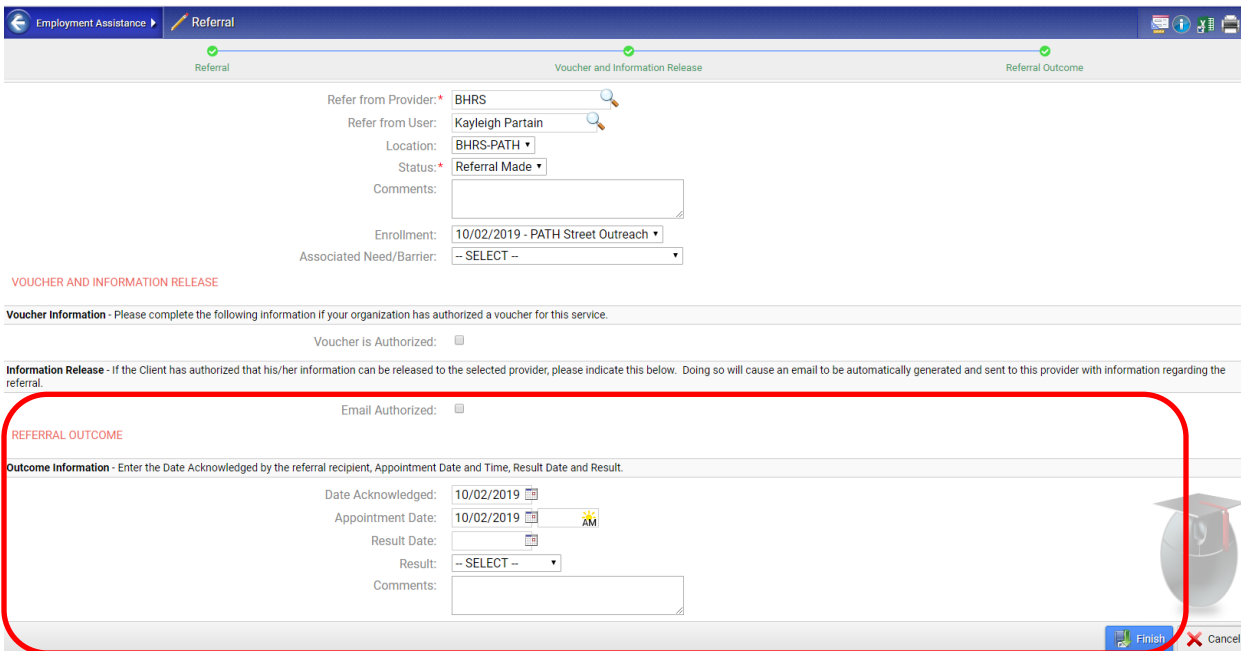
**For PATH:** You must make sure all referrals for PATH have outcomes; this is your guide for PATH reporting purposes.



Once a Referral is made, you can go back and **Edit the Outcome** at a later time by selecting Edit Referral 



Scroll down and update the data on outcomes and Finish



## Update/Annual Assessment

**Update:** These data elements represent information that is either collected a multiple points during project enrollment in order to track changes over time (e.g., Income and Sources) or is entered to record project activities as they occur (e.g., Services Provided) The frequency with which data must be collected depends on the data element and the funder requirements.

**Annual assessment:** Is a specialized subset of the “update” collection point. The annual assessment must be recorded no more than 30 days before or after the anniversary of the client’s Project Start Date, regardless of the date of the most recent “update” or “annual assessment”, if any (annually). *\*Anniversary of the Head of Household’s Project Start Date\**

**HUD-funded programs and for HUD reporting purposes, the “annual assessment” is MANDATORY.**

→ New Assessment

Used for “New” Update or “New” Annual Assessment

→ Update Existing

Used for updating a previous During Program Enrollment

→ During Program Enrollment

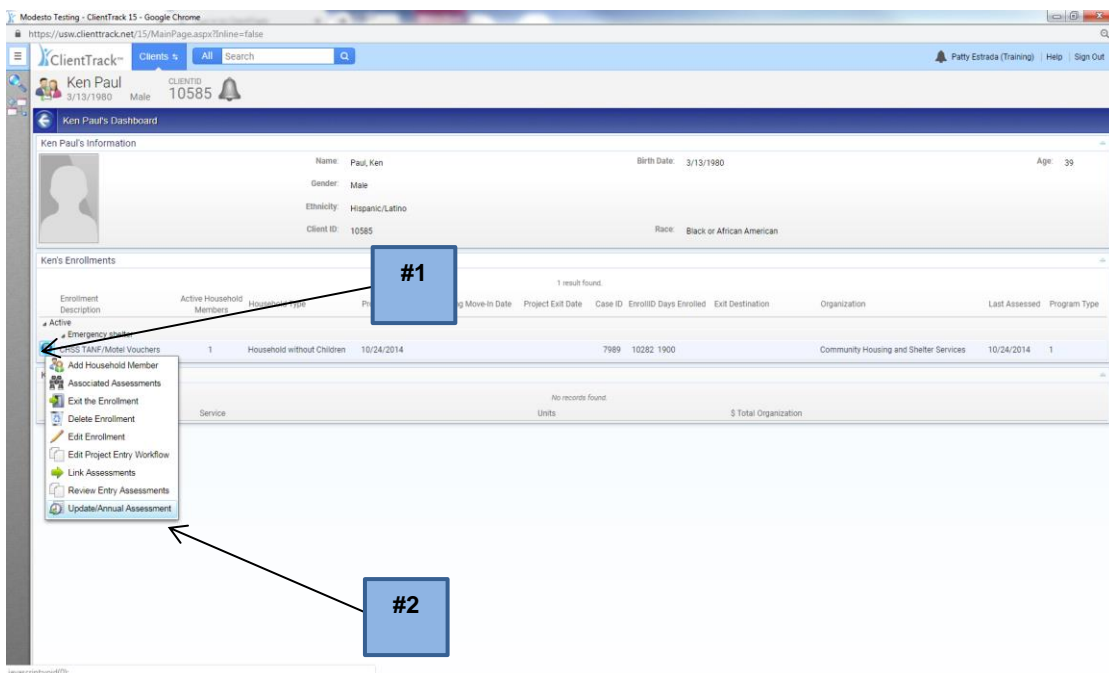
Used for updating Client’s Barriers, DV, Income & Sources

→ Annual

Used to perform HUD Mandatory Annual Assessment

## Performing Updates (Update)

- #1. From the Client Dashboard click on the blue action arrow by the enrollment you want to update
- #2. Click on Update/Annual Assessment



## Enrollment Assessment

Begin the assessment verify that the enrollment information is correct and select No Changes.

The screenshot shows the 'Assessment For Enrollment' form for Ken Paul. The form includes instructions on how to determine the Project Start Date for various housing types: Street Outreach projects, Emergency Shelters, Safe Havens and Transitional Housing, and Permanent Housing (including Rapid Re-Housing). It also defines a Household. A table lists the client's information:

Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household
Paul, Ken	Male	39	10/24/2014	Lynnell Fuller	Self

At the bottom right, there are two buttons: 'Save' and 'No Changes', with the latter circled in red.

**Performing During Program Enrollment (Barrier Changes)**, Select New Assessment then select During Program Enrollment.

This screenshot shows the 'New or Update Existing' selection screen for Ken Paul's assessment. The options are:

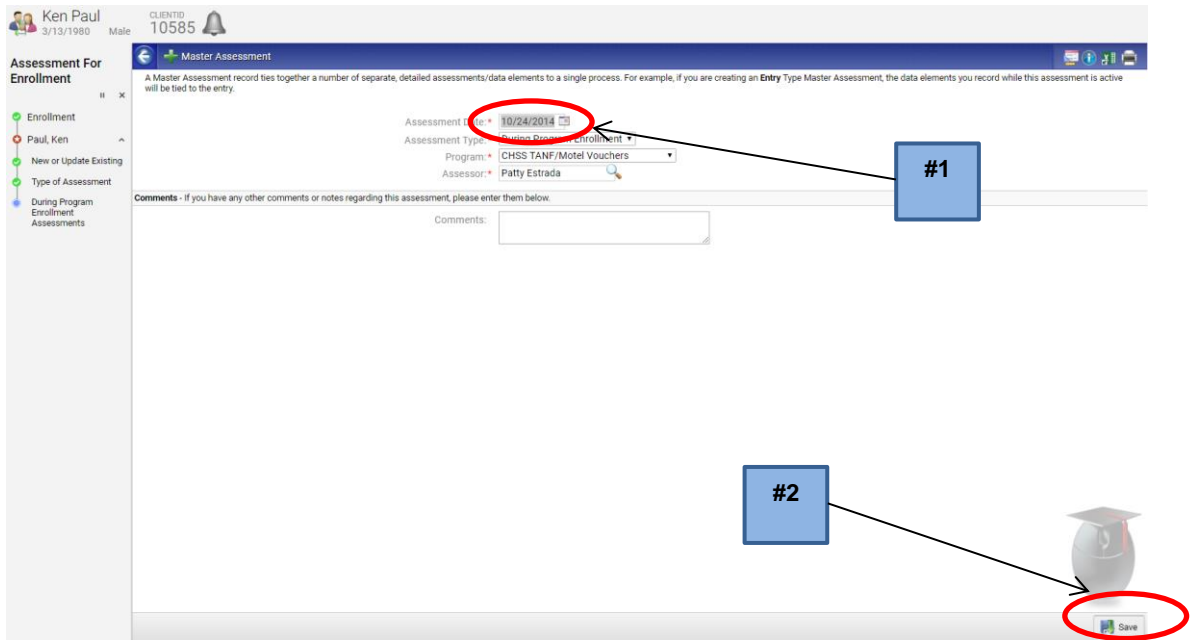
- New Assessment (circled in red)
- Update Existing

This screenshot shows the 'Type of Assessment' selection screen for Ken Paul's assessment. The options are:

- During Program Enrollment (circled in red)
- Annual

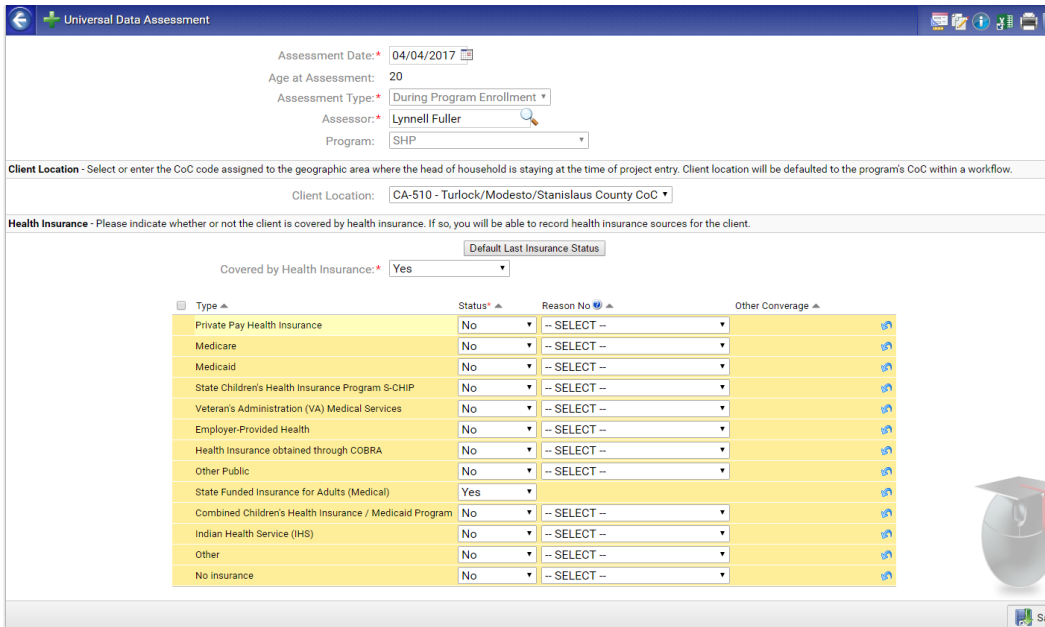
# Master Assessment

- #1. Verify the Assessment Date
- #2. Save



# Universal Data Assessment

You can default to the last Insurance Status if there have been no changes and select Save



## Barriers Assessment: will be completed; you can Save or make changes

Universal Data Assessment > SOAR Connection > Barriers

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

[View Barrier History](#)

**Assessment Active**

Identified Date: 10/02/2019  
 Screen: Special Needs  
 Disabling Condition: Yes

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

## Domestic Violence Assessment: you can also Default to Last Assessment if there has been no change

Universal Data Assessment > SOAR Connection > 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.

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: 10/02/2019  
 Domestic Violence Experience:  Yes  
 No  
 Client doesn't know  
 Client refused  
 Data Not Collected

## Income Sources & Non-Cash Benefits

Universal Data Assessment > Domestic Violence Assessment > Income and Sources, Non-Cash Benefits

[Default Last Assessment](#)

**Assessment Active**

Assessment Date: 04/04/2017  
 Income from Any Source: Yes  
 Non-Cash Benefits from Any Source: Yes  
 Expenses: -- SELECT --

Type	Description	Monthly Amount
<input type="checkbox"/> Earned Income		
<input type="checkbox"/> Unemployment Insurance		
<input checked="" type="checkbox"/> Supplemental Security Income	Sam \$600.00	\$600.00
<input type="checkbox"/> Social Security Disability Income		
<input type="checkbox"/> Private Disability Insurance		
<input type="checkbox"/> Worker's Compensation		
<input type="checkbox"/> VA Service-Connected Disability Compensation		
<input type="checkbox"/> VA Non-Service-Connected Disability Pension		
<input type="checkbox"/> Pension or retirement income from a previous job		
<input checked="" type="checkbox"/> TANF		\$400.00
<input type="checkbox"/> General Assistance		
<input type="checkbox"/> Retirement (Social Security)		
<input type="checkbox"/> Child Support		

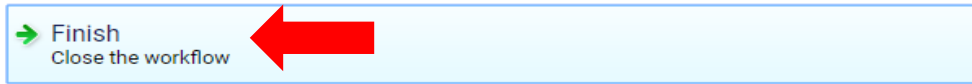
Count/Total Monthly Income: 2 \$1,000.00

[Save and Close](#)

Make sure to click on the **Finish, Close the Workflow**

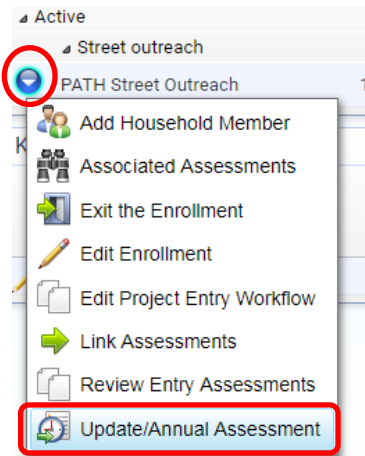
You're done!

All required steps have been completed.

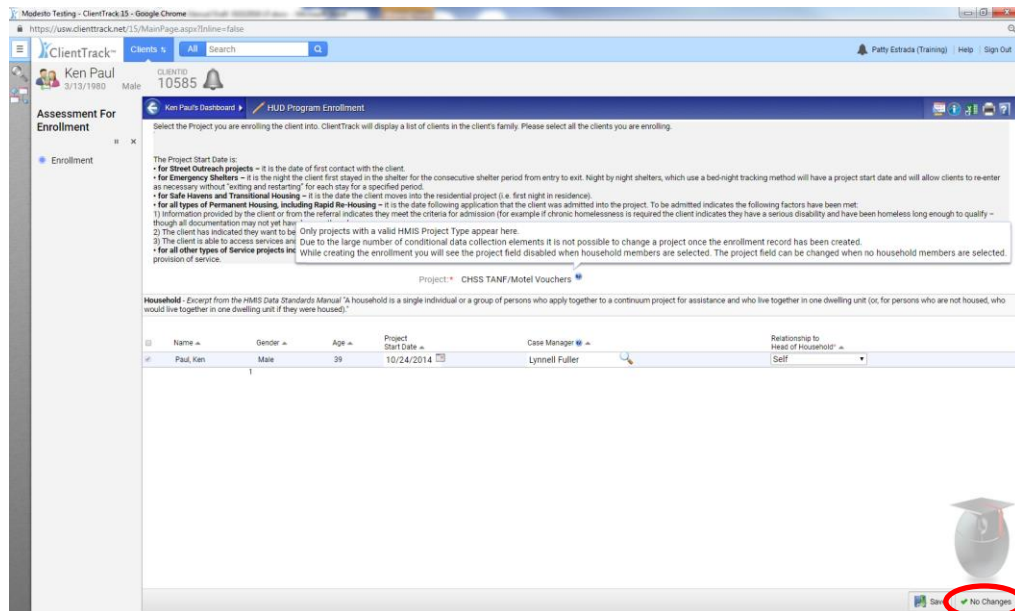


## Performing Annual Assessment

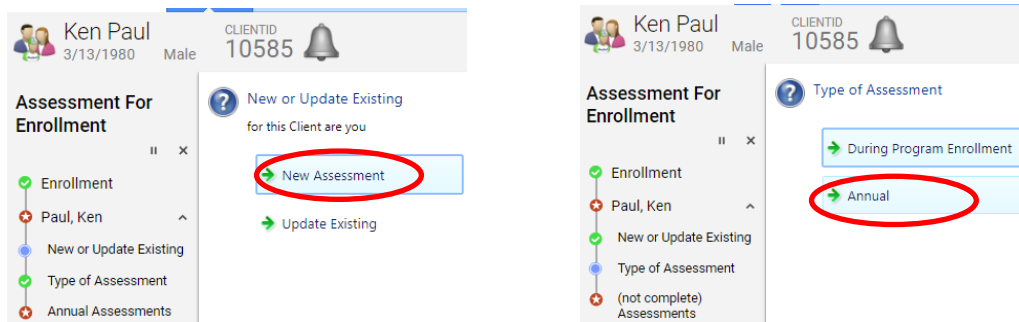
Start at the Client Dashboard, click on the **Blue Action Arrow** to the Enrollment you are performing the Annual Assessment on, and choose **Update/Annual Assessment**




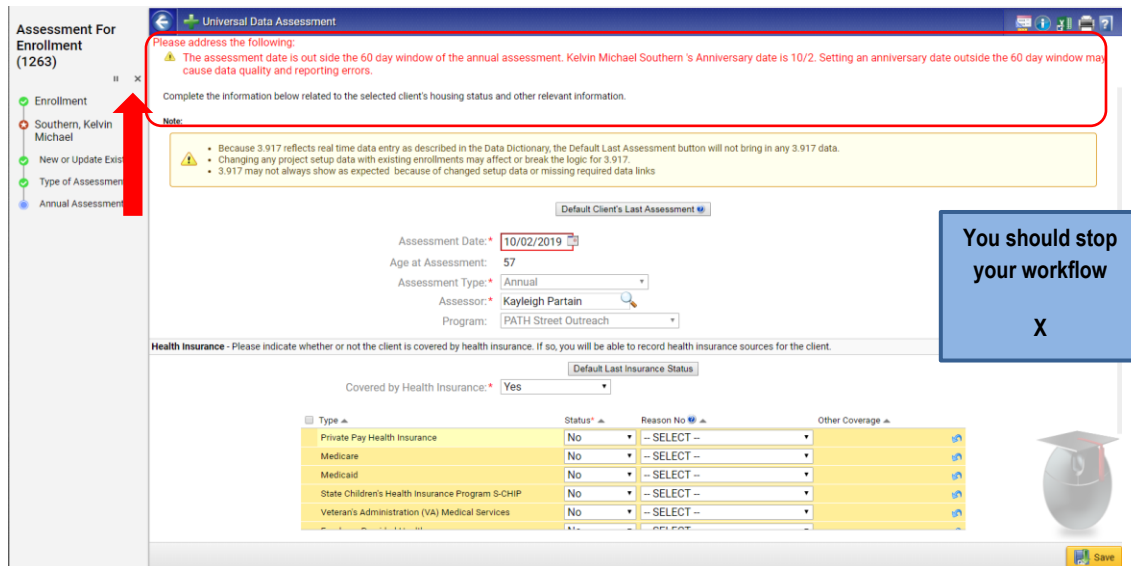
**Enrollment Assessment: No changes with the Enrollment**



You will be asked New or Update Existing and Type of Assessment: Choose **New Assessment** and **Annual**

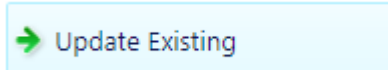
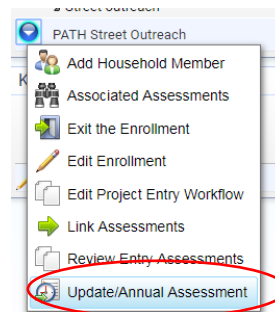


The system will give you the warning:  If the assessment date is outside the 60 day window of the annual assessment. Kelvin Michael Southern's Anniversary date is 10/2. Setting an anniversary date outside the 60 day window may cause data quality and reporting errors.



## Updating Existing Assessment

Go through the same process starting at the Blue Action Arrow



Then Select

You can Change the Type of Assessment you are looking for then Search or if correct is showing click on it.

Date	Type	Program	Assessor	Comments
01/06/2020	During Program Enrollment	CHSS TANF/Motel Vouchers	Patty Estrada	

**Universal Assessment:** You will be taken through the entire workflow process where you can make the change or continue moving forward

Type	Status	Reason No	Other Coverage
Private Pay Health Insurance	No	-- SELECT --	
Medicare	No	-- SELECT --	
Medicaid	No	-- SELECT --	
State Children's Health Insurance Program S-CHIP	No	-- SELECT --	
Veteran's Administration (VA) Medical Services	No	-- SELECT --	
Employer-Provided Health	No	-- SELECT --	
Health Insurance obtained through COBRA	No	-- SELECT --	
Other Public	No	-- SELECT --	
State Funded Insurance for Adults (Medical)	Yes		
Combined Children's Health Insurance / Medicaid Program	No	-- SELECT --	
Indian Health Service (IHS)	No	-- SELECT --	
Other	No	-- SELECT --	
No insurance	No	-- SELECT --	

## Barriers

Barrier	Barrier Present?	Condition is Indefinite?	Explanation	Previous Barrier Details
Alcohol Abuse	No			Previous Barrier
Chronic Health Condition	No			Previous Barrier
Developmental Disability	No			Previous Barrier
Drug Abuse	No			Previous Barrier
HIV/AIDS	No			Previous Barrier
Mental Illness	Yes	Yes		Previous Barrier
Physical Disability	Yes	Yes		Previous Barrier



## Domestic Violence

Find Assessment > Master Assessment > 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.

Assessment Active

Assessment Date: 10/02/2019

Domestic Violence Experience:

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

## Income Sources & Non-Cash Benefits

Master Assessment > Domestic Violence Assessment > 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).

Assessment Active

Assessment Date: 01/06/2020

Income from Any Source: Yes

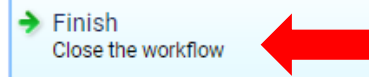
Non-Cash Benefits from Any Source: Yes

Expenses: Data Not Collected

Make sure to click on the **Finish, Close the Workflow**

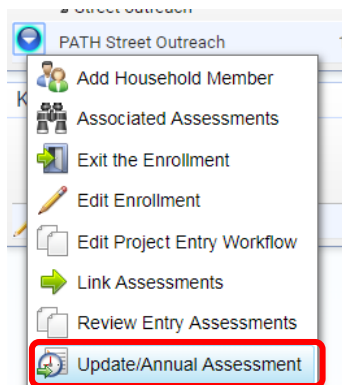
You're done!

All required steps have been completed.

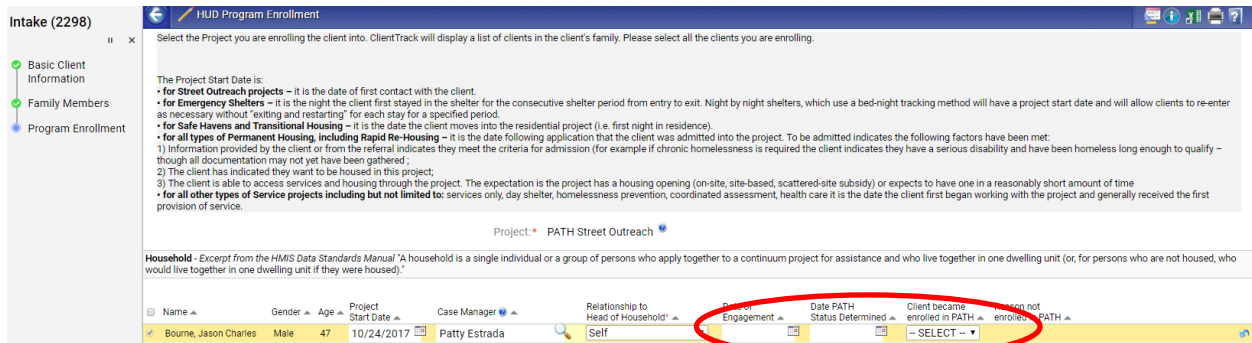


## Updating PATH Enrollment Adding Engagement Date or PATH Enrolled

Go to Client Dashboard>Blue Action Arrow>Update/Annual Assessment

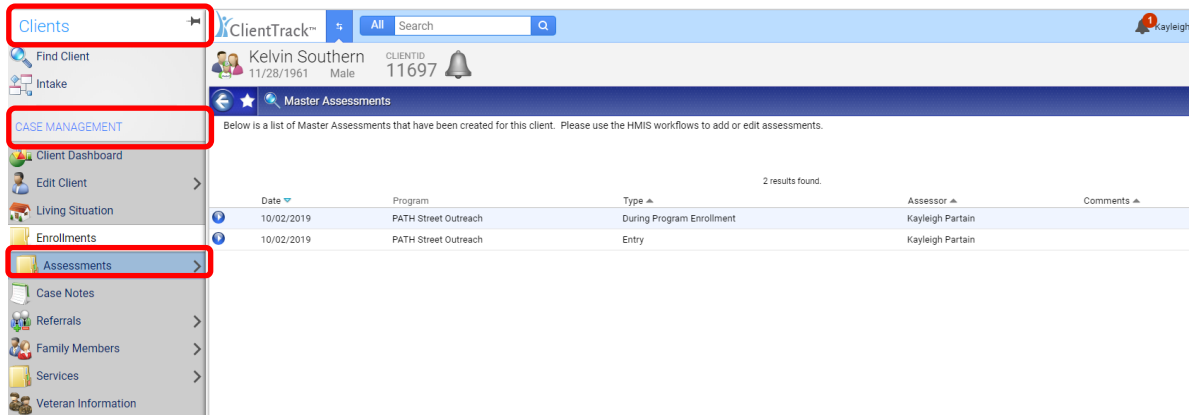


**\*Note:** You can make any changes to the Date of Engagement, Date PATH Status Determined, Client became enrolled in PATH. **DO NOT CHANGE PROJECT START DATE;** You will then go through the entire workflow.

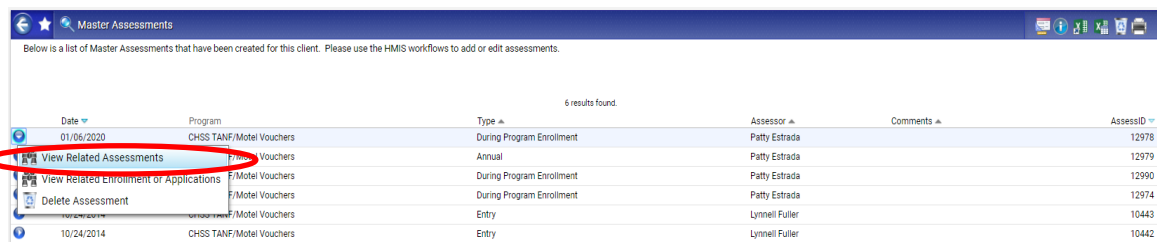
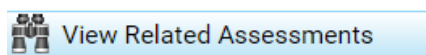


## View and Edit Master Assessment

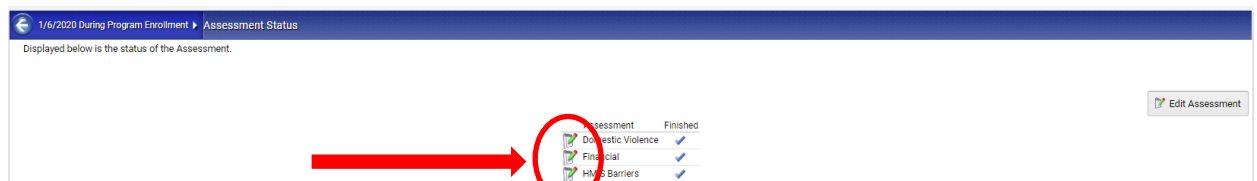
Select Menu > Case Management > Assessments



Click on the **Blue Action Arrow** and select **View Related Assessments**



You can click on the Note Pad  and Edit one of the Assessments



1/6/2020 During Program Enrollment > Assessment Status > 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.

Assessment Active

Assessment Date: 01/06/2020

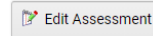
Domestic Violence Experience:
 

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

Make sure you save any changes you might have made



Or you can use the Edit Assessment button to get to the Universal Data Assessment



1/6/2020 During Program Enrollment > Assessment Status

Displayed below is the status of the Assessment.

Assessment	Finished
Domestic Violence	<input checked="" type="checkbox"/>
Financial	<input checked="" type="checkbox"/>
HMS Barriers	<input checked="" type="checkbox"/>

[Edit Assessment](#)

## Universal Data Assessment

1/6/2020 During Program Enrollment > Assessment Status > Master Assessment

A Master Assessment record ties together a number of separate, detailed assessments/data elements to a single process. For example, if you are creating an Entry Type Master Assessment, the data elements you record while this assessment is active will be tied to the entry.

Start Assessment:
 

- Assessment Date: 01/06/2020
- Assessment Type: During Program Enrollment
- Program: CHSS TANF/Motel Vouchers
- Assessor: Patty Estrada

Comments - If you have any other comments or notes regarding this assessment, please enter them below.

Comments:

Once complete



## Exit Enrollments

If you are exiting an entire family, start from the (HOH) client's Dashboard. If you are only exiting one member from the enrollment, skip to Exiting only one family member in an enrollment other than the HOH section. When a client has transitioned from your project or is no longer receiving services for any reason, you will exit the client from your project in ClientTrack. **Workspace>Client Record/Dashboard>Blue Action Arrow on the Enrollment you want to Exit>**

Ken's Enrollments

Enrollment Description	Active Household Members
Active	
Emergency shelter	
CHSS TANF/Motel Vouchers	1

- Add Household Member
- Associated Assessments
- Exit the Enrollment**
- Delete Enrollment
- Edit Enrollment
- Edit Project Entry Workflow
- Link Assessments
- Review Entry Assessments
- Update/Annual Assessment

- #1. Complete the Exit Date, Destination, Exit Reason, and End Case Assignment
- #2. Do not complete the services from this screen, click Save

Ken Paul's Dashboard | Enrollment Exit

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

Exit Date: 01/07/2020  
 Destination: Rental by client with RRH or equivalent subsidy  
 Exit Reason: Completed Program  
 Case Manager Assignment: Lynnell Fuller  
 End Case Assignment:

Family Income:

Income	Family Income	Family Members	Poverty Level	% of Poverty
\$0.00	\$0.00	1	\$1,040.83	0.00 %

Service Date: 01/07/2020  
 Grant: --SELECT--  
 Enrollment: 10/24/2014 - CHSS TANF/Motel Vouchers

47 results found.

Service	Unit Type	Units	Unit Value	Total
Case management services	Count	1.00	\$0.00	\$0.00
Child care	Dollars	1.00	\$0.00	\$0.00
Consumer Life Skills/Advocacy	Count	1.00	\$0.00	\$0.00
Criminal Justice/Legal Service	Count	1.00	\$0.00	\$0.00
Day Care	Count	1.00	\$0.00	\$0.00
Do you have any pets? If yes, number and dogs or cats?	Count	1.00	\$0.00	\$0.00
Education	Count	1.00	\$0.00	\$0.00
Educational assistance	Count	1.00	\$0.00	\$0.00
Emergency housing assistance	Dollars	1.00	\$0.00	\$0.00
Employment	Count	1.00	\$0.00	\$0.00
Employment and training services	Count	1.00	\$0.00	\$0.00
		0.00	\$0.00	\$0.00

Save

- #1. Make sure Assessment Date is correct, (You are unable to change the Assessment Type or Program)
- #2. Make sure you complete the Health Insurance. You may Default the Last Insurance Status, if there are no changes.

Ken Paul's Dashboard | Enrollment Exit | Universal Data Assessment

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

Note:

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

Default Client's Last Assessment

Assessment Date: 01/07/2020  
 Age at Assessment: 39  
 Assessment Type: Exit  
 Assessor: Patty Estrada  
 Program: CHSS TANF/Motel Vouchers

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 Pay Health Insurance	--SELECT--	--SELECT--	
Medicare	--SELECT--	--SELECT--	
Medicaid	--SELECT--	--SELECT--	
State Children's Health Insurance Program S-CHIP	--SELECT--	--SELECT--	
Veteran's Administration (VA) Medical Services	--SELECT--	--SELECT--	
Employer-Provided Health	--SELECT--	--SELECT--	
Health Insurance obtained through COBRA	--SELECT--	--SELECT--	
Other Public	--SELECT--	--SELECT--	
State Funded Insurance for Adults (Medica)	--SELECT--	--SELECT--	
Combined Children's Health Insurance / Medicaid Program	--SELECT--	--SELECT--	
Indian Health Service (IHS)	--SELECT--	--SELECT--	
Other	--SELECT--	--SELECT--	
No insurance	--SELECT--	--SELECT--	

Save

**Barriers Assessment:** Barriers are Defaulted. Verify for accuracy or changes.

Identified Date:\* 10/02/2019  
 Screen: Special Needs  
 Disabling Condition: Yes

<input type="checkbox"/>	Barrier	Help	Barrier Present?*	Condition Is Indefinite	Explanation	Previous Barrier Details
<input checked="" type="checkbox"/>	Alcohol Abuse	?	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/>	Chronic Health Condition	?	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/>	Developmental Disability	?	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/>	Drug Abuse	?	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/>	HIV/AIDS	?	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/>	Mental Illness	?	Yes	Yes		<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/>	Physical Disability	?	Yes	Yes		<a href="#">Previous Barrier</a>

**Income Sources & Non-Cash Benefits:** You may Default the Last Assessment, if the information is accurate and up to date so you capture your true successes.

Universal Data Assessment > SOAR Connection > 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:\* 10/02/2019  
 Income from Any Source:\* No  
 Non-Cash Benefits from Any Source:\* Yes  
 Expenses: -- SELECT --

**Non-Cash Benefits**

<input type="checkbox"/>	Type	Description	Monthly Amount
<input type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children		
<input checked="" type="checkbox"/>	Supplemental Nutrition Assistance Program (SNAP)		\$192.00
<input type="checkbox"/>	TANF Child Care Services		
<input type="checkbox"/>	TANF Transportation Services		
<input type="checkbox"/>	Other TANF-funded Services		
<input type="checkbox"/>	Section 8 Public Housing or Other Rental Assistance		
1 Depreciated in 2017 (HMIS v6.1)			Count/Total Monthly Income: 1 \$192.00

[Save and Close](#)

**Make sure you click on the Finish: Close the workflow bar**

You're done!

All required steps have been completed.



# Unique Project Requirements at Exit

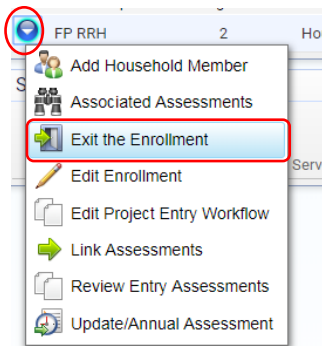
There are variations in data requirements for different project exits. In the following section are screenshots of project exits and their unique requirements during the exit workflow for the following projects.

1. Rapid Rehousing Enrollment (RRH)
2. Runaway and Homeless Youth Enrollment (RHY)
3. Projects for Assistance in Transition from Homelessness (PATH) Enrollment

## Rapid Re-Housing Exit (RRH)

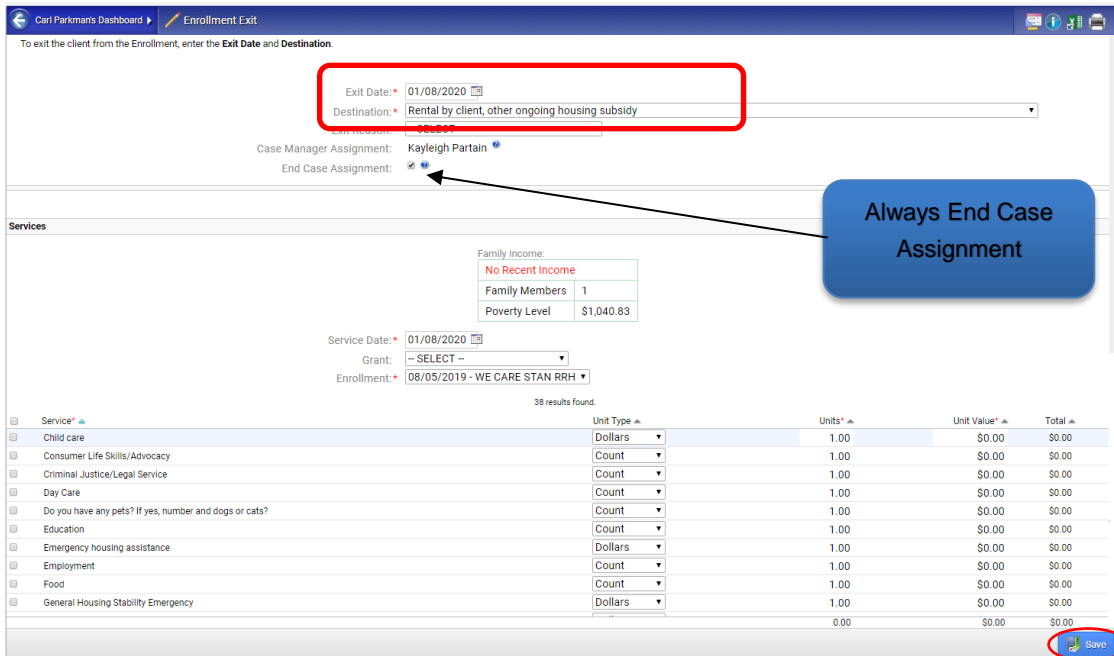
It is **CRUCIAL** prior to exiting RRH that you have updated the client record with a **Housing Move-in Date** as the Exit workflow will not ask.

To begin with the Exit, you must begin at the Client Workspace on the Client Dashboard.



Select the **Blue Action Arrow** on the Enrollment you want to Exit and select **Exit the Enrollment**

## Enrollment Exit



**Universal Data Assessment:** If there are no changes to the data you may default to last assessment.

HUD Program Exit

Stewie Fleming's Dashboard > Enrollment Exit > Universal Data Assessment

Default Client's Last Assessment

Assessment Date: 10/02/2019  
 Age at Assessment: 30  
 Assessment Type: Exit  
 Assessor: Kayleigh Partain  
 Program: FP RRH

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

Covered by Health Insurance: Yes

Type	Status	Reason No	Other Coverage
Private Pay Health Insurance	No	--SELECT--	
Medicare	No	--SELECT--	
Medicaid	No	--SELECT--	
State Children's Health Insurance Program S-CHIP	No	--SELECT--	
Veteran's Administration (VA) Medical Services	No	--SELECT--	

**Barriers:** are pre-populated so make sure you make changes if needed

Assessment Active

Identified Date: 10/02/2019  
 Screen: Special Needs  
 Disabling Condition: No

Barrier	Barrier Present?	Condition is Indefinite	Explanation	Previous Barrier Details
Alcohol Abuse	No			Previous Barrier
Chronic Health Condition	No			Previous Barrier
Developmental Disability	No			Previous Barrier
Drug Abuse	No			Previous Barrier
HIV/AIDS	No			Previous Barrier
Mental Illness	No			Previous Barrier
Physical Disability	No			Previous Barrier

### Income Sources & Non-Cash Benefits

Assessment Active

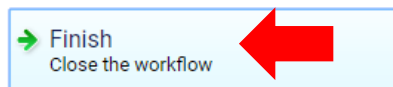
Assessment Date: 10/02/2019  
 Income from Any Source: Yes  
 Non-Cash Benefits from Any Source: No  
 Expenses: --SELECT--

Income

Type	Description	Monthly Amount
Earned Income		\$1,500.00
Unemployment Insurance		
Supplemental Security Income		
Social Security Disability Income		
Private Disability Insurance		
Worker's Compensation		
Count/Total Monthly Income:		1 / \$1,500.00

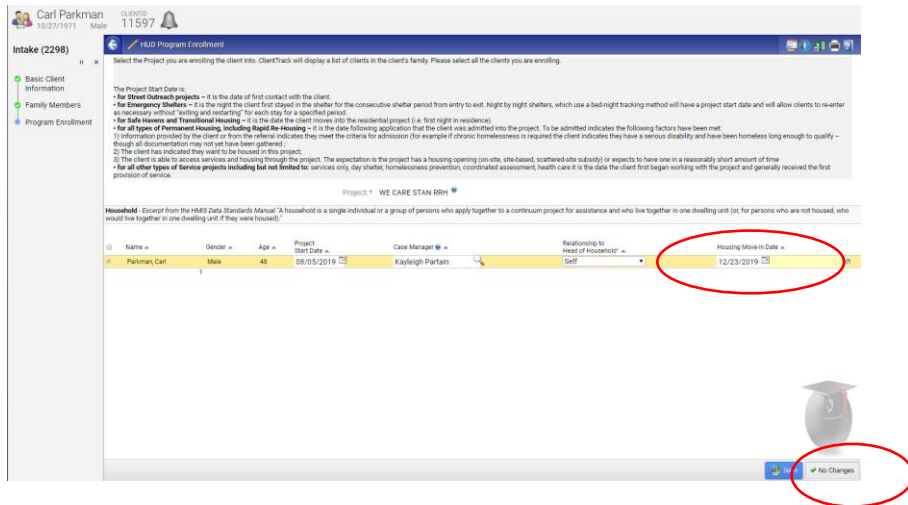
Save and Close

**Make Sure you click on Finish and Close the Workflow**



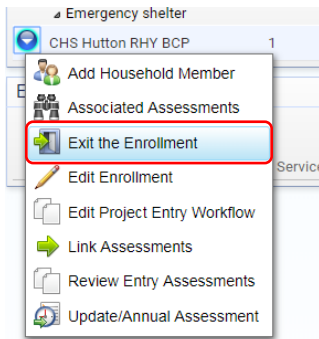
**NOTE:** Below is showing the client I just exited above from a RRH Project. Edit Project entry workflow to add the Housing Move-in Date to ensure your success will be captured in reporting!

Destination: Rental by client, other ongoing housing subsidy



## Runaway Homeless Youth (RHY) Exit

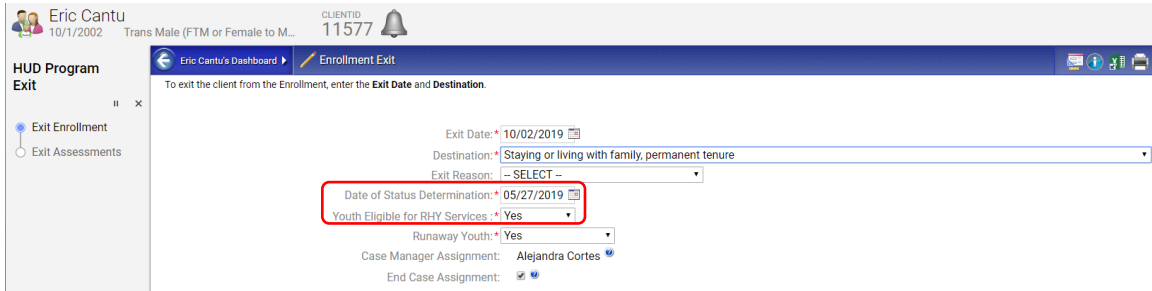
To begin with the Exit, you must begin at the Client Workspace on the Client Dashboard.



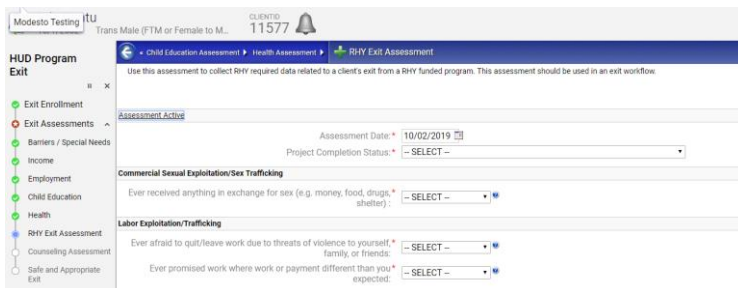
Click on the **Blue Action Arrow** for the Enrollment you want to Exit, and **Select Exit the Enrollment**

**You will continue through the workflow as usual for TLP,BCP & BCPHP**

## RHY Exit Assessment: RHY BCP will ask the Date of Status Determination & Youth Eligible for RHY Services



## RHY EXIT Assessment





## RHY Counseling Assessment

Eric Cantu  
10/1/2002 Trans Male (FTM or Female to M... CLIENTID 11577

HUD Program Exit

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

Assessment Active

Pre-Exit

Assessment Date: 10/02/2019  
Counseling received by client: -- SELECT --  
Total number of sessions planned in youth's treatment or service plan: 1-48+

Post-Exit

A plan is in place to start or continue counseling after exit: -- SELECT --

## RHY Safe and Appropriate Exit

Modesto Testing TU  
Trans Male (FTM or Female to M... CLIENTID 11577

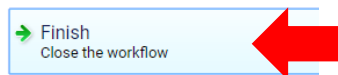
HUD Program Exit

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

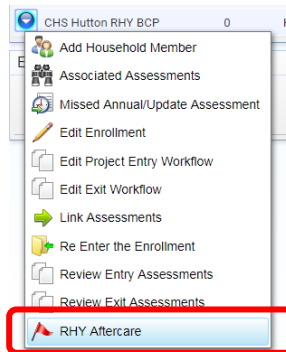
Assessment Active

Assessment Date: 10/02/2019  
Exit destination safe - as determined by client: -- SELECT --  
Exit destination safe - as determined by the project/caseworker: -- SELECT --  
Client has permanent positive adult connections outside of project: -- SELECT --  
Client has permanent positive peer connections outside of project: -- SELECT --  
Client has permanent positive community connections outside of project: -- SELECT --

Make sure you click on Finish Close the workflow.



**RHY Aftercare:** This element is intended to record services provided beyond the period of residential stay that offers continuity and supportive follow-up to youth served by the program. Aftercare is those entries that are entered after the date of exit up to 180 days.



## Create Aftercare Assessment

**HMIS 2017 Post Exit**

Create Aftercare Assessment

**?** Create Aftercare Assessment

Would you like to start a RHY Aftercare Assessment. Selecting Yes will create a Post-Exit Assessment for Eric.

Yes

No

## RHY Aftercare Assessment

Modesto Testing - ClientTrack 15 - Google Chrome

https://usw.clienttrack.net/15/MainPage.aspx?Inline=false

ClientTrack™ Clients All Search

Eric Cantu 10/1/2002 Trans Male (FTM or Female to M... CLIENTID 11577

Eric Cantu's Dashboard RHY Aftercare Assessment

Collected at Post-Exit stage for all RHY funded projects with the exception of the street outreach component (SOP). This must be dated within 180 days after the project exit date.

Assessment Active

Information Date\* (Date information was collected): 10/02/2019

Aftercare was provided:\* -- SELECT --

- SELECT --
- Yes
- No
- Client refused

## Projects for Assistance in Transition from Homelessness (PATH) Exit

For PATH clients being discharged, their "Date of PATH Status Determined" and their PATH enrollment status will be required during the exit workflow on the "Enrollment Exit" screen as seen below. This information should have been entered on the Update. The system will give you one last opportunity to add this information.

Enrollment Description	Active Household Members
Active	
Street outreach	
PATH Street Outreach	1
Add Household Member	
Associated Assessments	0
Exit the Enrollment	
Delete Enrollment	
Edit Enrollment	
Edit Project Entry Workflow	
Link Assessments	/25/2019
Review Entry Assessments	/25/2019
Update/Annual Assessment	/01/2019
	/02/2016

## Enrollment Exit

HUD Program Exit

Exit Enrollment

Exit Assessments

Enrollment Exit

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

Exit Date: 10/02/2019

Destination: --SELECT--

Exit Reason: --SELECT--

Case Manager Assignment: Kayleigh Partain

End Case Assignment:

## SOAR Connection

SOAR Connection

Indicate the Connection with SOAR for the client below.

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: 10/02/2019

Connection with SOAR: Yes

## Current Living Situation

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: 10/02/2019

Enrollment: 10/02/2019 - 10/02/2019 - PATH Street Outreach

Living Situation Information

Living Situation: --SELECT--

Location Detail:

Record Contact:

Make sure you click on Finish Close the workflow.

You're done!

All required steps have been completed.

Finish  
Close the workflow

## Exiting Only One Family Member From Enrollment

Example: If you are needing to exit Patricia Fleming who is the CHILD of Steve Fleming

- #1. Bring up the family member/client you want to exit. You can get there from the "family icon" on the HOH Dashboard
- #2. The list of family members will show in the drop-down. Click on the client's name (Patricia Fleming)

ClientTrack™ Clients 4 All Search #1

Fleming, Steve - 1989

Quick Add Family Member

Patricia Kaye Fleming Age 7 Daughter

Sheena Georgina Fleming Age 29 Spouse

Steve Victor Fleming Age 30 Self

#2

## Client Dashboard

#3. Select the Blue Action Arrow for the Enrollment you want to exit

#4. Select Exit the Enrollment

Patricia Fleming's Dashboard

Patricia Fleming's Information

Name: Fleming, Patricia Kaye Birth Date: 7/11/2012  
Gender: Female  
Ethnicity: Hispanic/Latino  
Client ID: 11680 Race: American Indian or Alaska Native, White

Patricia's Enrollments

1 result found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination
PH - Rapid Re-Housing FP RRH	2	Household with Children and Adults	08/19/2019			9414	11942	142	

Context Menu:

- Add Household Member
- Associated Assessments
- Exit the Enrollment**
- Delete Enrollment
- Edit Enrollment
- Edit Project Entry Workflow
- Link Assessments
- Review Entry Assessments
- Update/Annual Assessment

## Exit Enrollment Assessment

Patricia Fleming's Dashboard Enrollment Exit

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

Exit Date: 10/02/2019  
Destination: Staying or living with family, permanent tenure  
Exit Reason: -- SELECT --  
Case Manager Assignment: Student 17  
End Case Assignment:

## Universal Data Assessment

- 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: 10/02/2019  
Age at Assessment: 7  
Assessment Type: Exit  
Assessor: Kayleigh Partain  
Program: FP RRH

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

## Barriers Assessment

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

[View Barrier History](#)

Assessment Active

Identified Date: 10/02/2019

Screen: Special Needs

Disabling Condition: No

Barrier	Help	Barrier Present?	Condition is Indefinite	Explanation	Previous Barrier Details
Alcohol Abuse	?	No			Previous Barrier
Chronic Health Condition	?	No			Previous Barrier
Developmental Disability	?	No			Previous Barrier
Drug Abuse	?	No			Previous Barrier
HIV/AIDS	?	No			Previous Barrier
Mental Illness	?	No			Previous Barrier
Physical Disability	?	No			Previous Barrier

It will ask if you want to exit Steve Fleming. Select  No

Patricia Fleming  
7/11/2012 Female CLIENTID 11680

**HUD Program Exit**

- Exit Enrollment
- Exit Assessments
- Fleming, Steve Victor
- Do you want to exit?
- Fleming, Sheena Georgina

Do you want to exit?  
Do you want to exit Fleming, Steve Victor?

Yes  
 No

Make sure you click on the Finish: Close the workflow bar

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

**Click on the finish bar**

→ Finish  
Close the workflow

Patricia's Enrollment has an Exit Date

Patricia's Enrollments

1 result found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date
Exited					
PH - Rapid Re-Housing					
FP RRH	2	Household with Children and Adults	08/19/2019		10/02/2019

## Steve's Enrollment has No Exit Date

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date
1 result found.					
Active					
PH - Rapid Re-Housing					
FP RRH	2	Household with Children and Adults	08/19/2019	10/07/2019	

## De-Identifying Client

*For use when HMIS Release of Information is Refused at Intake*

For clients who refuse to sign an HMIS Release of Information, they still need to be reported on and you must use certain de-identified data elements to enter them into HMIS. Please follow the steps provided.

- ❖ **First Name:** (use agency acronym in front of Anonymous) TSAAnonymous
- ❖ **Last Name:** Anonymous
- ❖ **Name Quality:** "Client Refused"
- ❖ **Social Security Number:** (Leave Blank)
- ❖ **Social Security Number Quality:** "Client Refused"
- ❖ **Date of Birth:** Use the client's correct birth month and year, but rounded to the first of the month, unless that is the client's actual birthdate, then shift by one month.
  - » **Example:** If the actual date of birth is 04/05/1991, the entered date of birth should be 04/01/1991
  - » **Other Example:** If actual birthdate is 10/01/1991, change to 09/01/1991.
- ❖ **Date of Birth Quality:** "Approximate or Partial DOB Reported"
- ❖ Other remaining data elements are generally not considered to be identifiable, so enter the correct information.
  - » **Exception:** Client is de-identified, but is from a small town and has a unique race, gender, national identity, and other traits that would make them still easily identifiable. Use best judgment to further mask the client's true identity.

**Note:** This process must be completed for all members in the household so the person who refuses consent is not easily identifiable.

### Agency Acronyms:

- Behavioral Health and Recovery Services: **BHRS**
- Catholic Charities of the Diocese of Stockton: **CCD**
- Center for Human Services: **CHS**
- Children's Crisis Center: **CCC**
- Community Housing and Shelter Services: **CHSS**
- Community Impact Central Valley: **CICV**
- Turning Point: **TP**
- United Samaritans Foundation: **USF**
- We Care: **WC**
- West Care San Joaquin Valley Veterans: **WCSJ**
- Family Promise: **FP**
- Helping Others Sleep Tonight: **HOST**
- Modesto Gospel Mission: **MGM**
- STANCO: **STANCO**
- The Salvation Army: **TSA**
- Turlock Gospel Mission: **TGM**

## Client Information

### #1. Only add First and Last Name for Code Name

ClientTrack Client Information

SEARCH EXISTING CLIENTS

The first step in adding a new client is to search existing client records for possible matches to avoid duplicate entry. Enter partial identifying information on the client, and then click Next to search from existing client records.

- If the system finds no potential matches, you will be taken directly to Step 2.
- If the system finds potential matches, the search results will display below. If an accurate match appears, select and open that existing client record by clicking on that row.
- If there are no accurate matches, click Next again to continue to Step 2 in adding a new client record.

First Name: TSAAnonymous  
Last Name: Anonymous

### #2. SSN Quality defaults to Client Doesn't Know. Make sure you change to CLIENT REFUSED

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: TSAAnonymous  
Last Name: Anonymous  
Middle Name:  
Suffix:  
Name Quality: Full name reported  
Social Security Number:  
SSN Quality:  
 Client doesn't know  
 Client Refused  
 Data not collected

### #3. Change Date of Birth Quality to **Approximate or Partial DOB Reported**.

Client Information

Name Quality: Full name reported  
Social Security Number:  
SSN Quality:  
 Client doesn't know  
 Client Refused  
 Data not collected

Basic Client Demographics

Birth Date: 06/01/1992  
Client Age: 27  
Date of Birth Quality:  
 Approximate or Partial DOB Reported  
 Full DOB Reported  
 Client doesn't know  
 Client refused  
 Data not collected

Ethnicity: Non-Hispanic/Latino  
Race: American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White, Client doesn't know  
Gender: Male  
Veteran Status: No

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 family.

Family: Anonymous, TSAAnonymous  
Relationship to Head of Household: Self  
Begin Date: 09/02/2019  
End Date:

Finish

Once you have enrolled the client into the program as Anonymous, you must send the HMIS Administrator the Client's true **Name, Full or Partial SSN** if you have it in your files, **Case ID**, and **Client ID** in a password secured document, solely for the purposes of monitoring duplicates. In the event the client is already in the system or decides at a later time to sign an HMIS Release of Information at another agency. \*Case ID is found on the Enrollment Information line.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-in Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
TSA Emergency Shelter	1	Household without Children	09/02/2019			9449	1985	43		Salvation Army ESG	9/2/2019	1

**Example: Joe Smith, SSN 555-55-5555, Client ID 11719, Case ID 9449**

## Submitting Support Issues Internally Through ClientTrack

If you need assistance logging into HMIS, please email HMIS Support. If you need assistance after logging into HMIS, please follow the steps listed below.

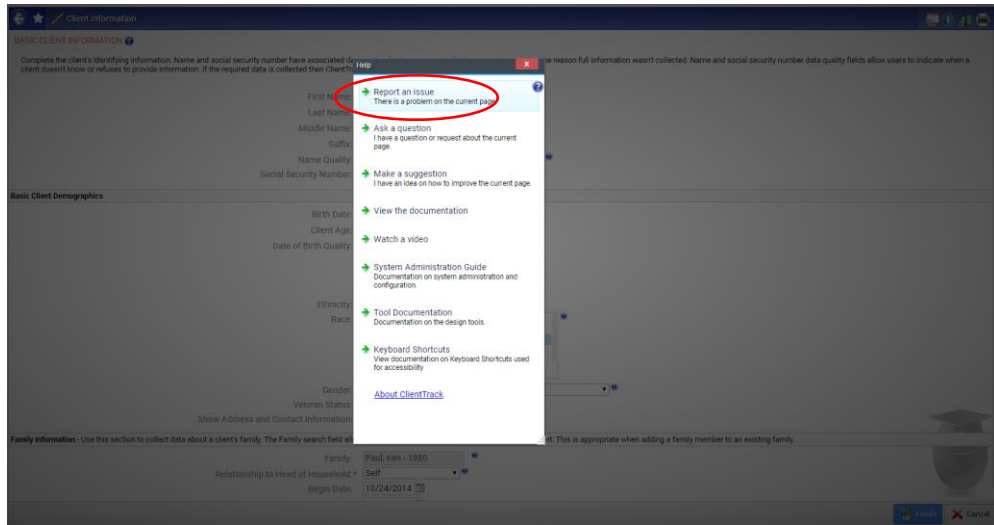
\*Note: If you are experiencing technical difficulties, please make sure you generate the support ticket from the page you are on or the workflow you are in.

Example: I am trying to do an intake for Brandie Harwell and I am not seeing all of the client's information. I would click on the **Help** link from the page I am on.

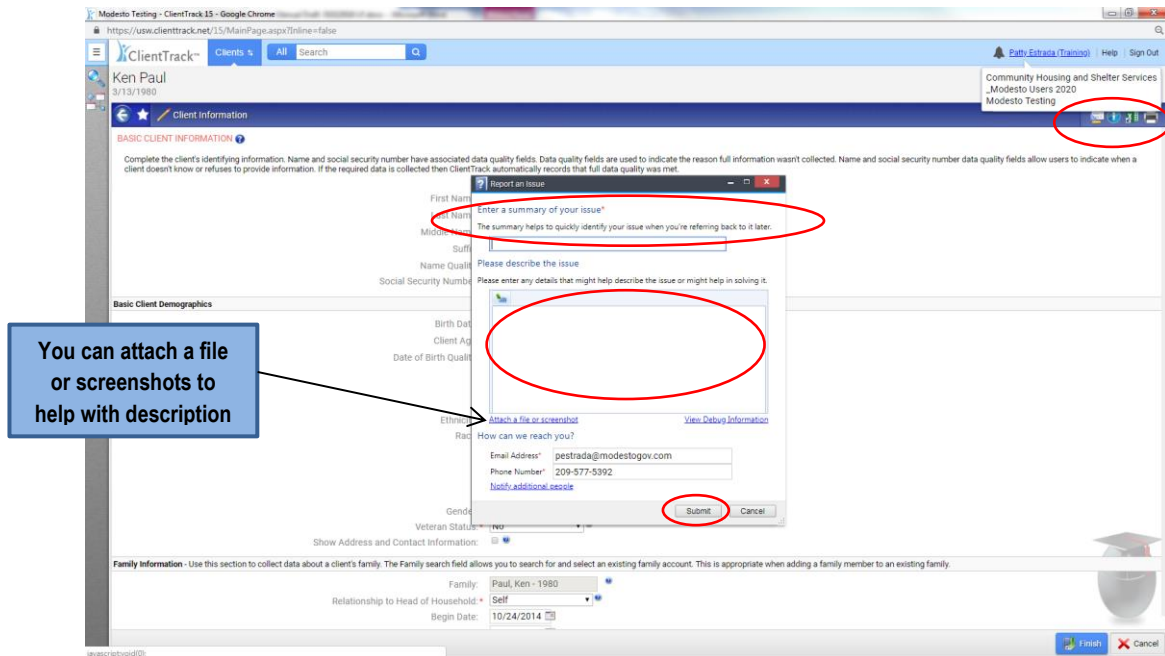
The screenshot shows the ClientTrack interface for a client named Brandie Harwell. The top navigation bar includes the ClientTrack logo, a 'Clients' dropdown, a search bar, and user information for Kayleigh Partain (Training). A 'Help' link is circled in red. The main content area displays the 'Basic Client Information' form, which includes fields for First Name (Brandie), Last Name (Harwell), Middle Name, Suffix, Name Quality (Full name reported), and Social Security Number (561-98-7529). Below this is the 'Basic Client Demographics' section, which includes Birth Date (10/23/1967), Client Age (51), and Date of Birth Quality (Full DOB Reported).



Click on Report an Issue (There is a problem on the current page)




Enter **Subject/Summary**, start with **client ID** and a **brief description of the issue**. In the **text box**, add **workgroup, organization, program, client ID, client name**, and **specific details to the issue you are having or any information that may help to resolve**. **Be very specific** when you submit an issue to limit the number of times HMIS support needs to reach out for clarification. **Please note**, if Duplicate clients, make sure you are specific **which client has the correct information to be merged**.



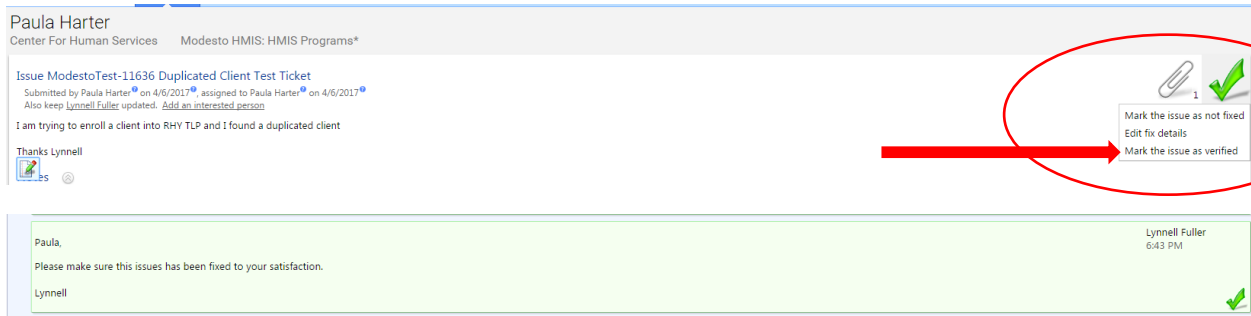
You and the system administrator will receive an email with a ticket number once it has been submitted.

**[ClientTrack Issues Tracking] Issue ModestoTest-11713 has been submitted**  
clienttrack-1-5@clienttrack.com  
Sent: Wed 10/16/2019 1:07 PM  
To: Kayleigh Partain

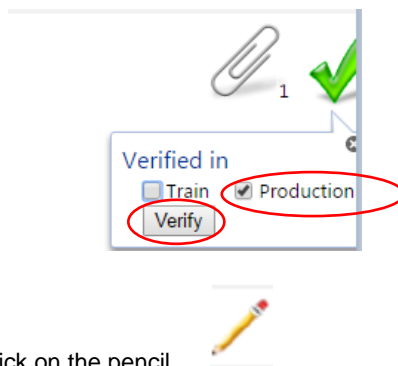
 **clienttrack-1-5@clienttrack.com**  
[ClientTrack Issues Tracking] Issue ModestoTest-11713 I

Your issue has been submitted to your local administrator and given the ID ModestoTest-11713

You will receive an email alert when a new note is added to the ticket, **log into HMIS** and respond. If the issue has been **resolved**, you must verify by hovering over the **Green Check** for more options, mark the issue as **Verified**.



If resolved, then you need to check that you verified in Production, and click **Verify**



To Edit your note or add notes you can click on the pencil.

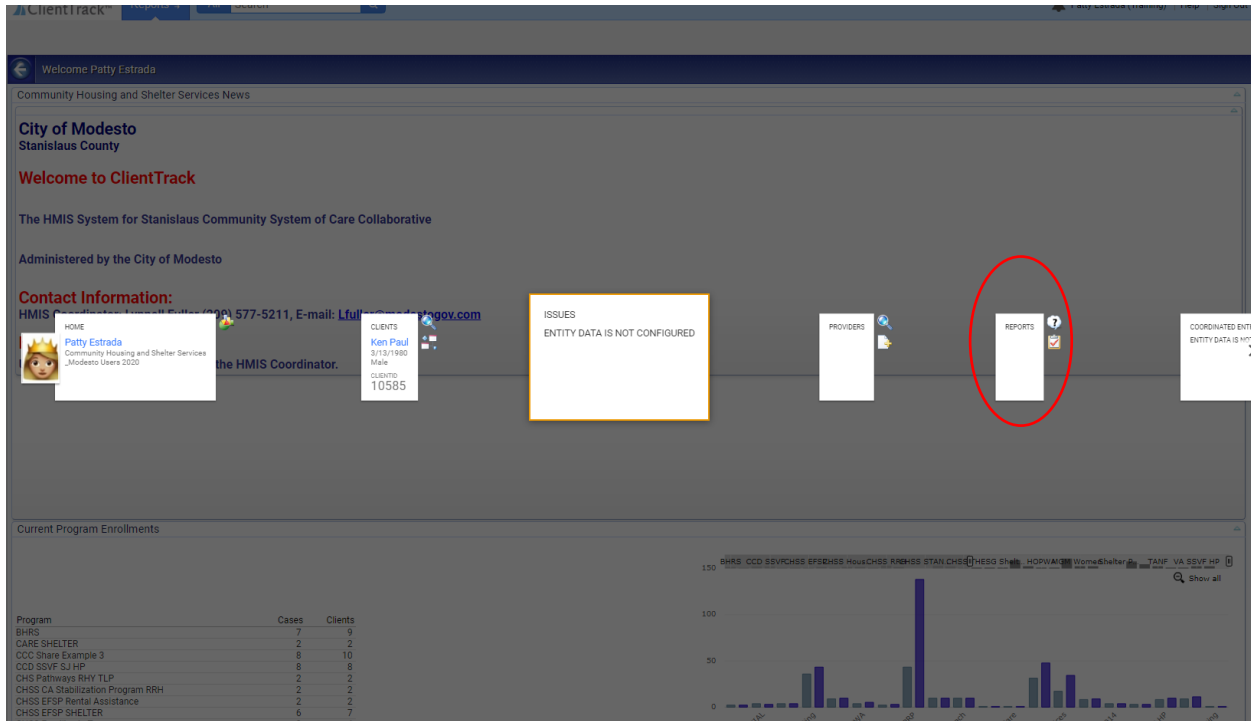


If the note is marked **Fixed, Verify Needed** you will need to review and make sure you mark the issue Verified.

**\*Note:** Please make sure you are reviewing your submitted issues in the event there are questions attached to it, also, please include your direct phone number.

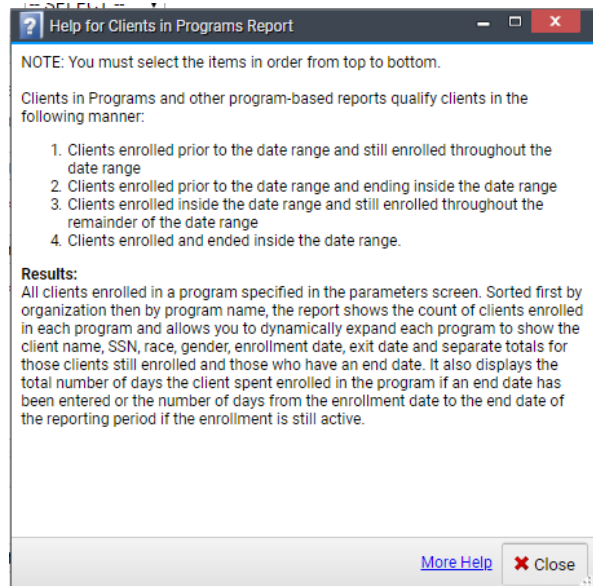
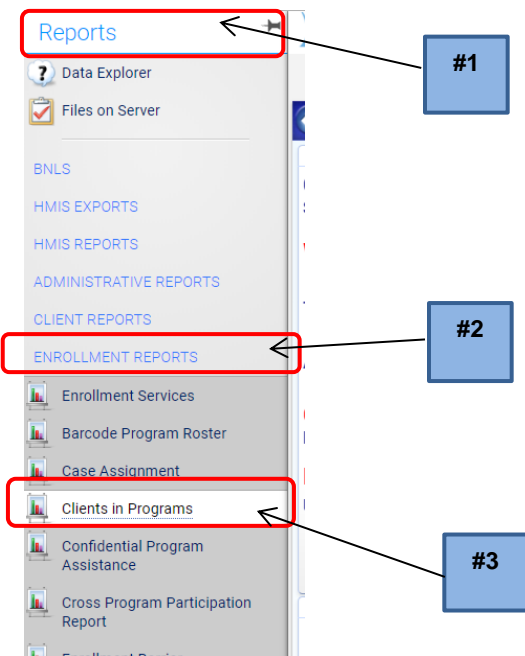
# HMIS Reports

Access the Reports Workspace from the Workspace Carousel.



## Clients in Program

Reports Workspace, open **Menu Navigation**, select **Enrollment Reports**, then choose **Clients in Programs**



**#1. Specify the Date Range #2. Report Type #3. Program #4. Report**

ClientTrack™ Reports All Search Patty Estrada (Training) Help Sign Out

Clients in Programs Report

For help relating to this form, 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 **Save** 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: --SELECT--

Enrollments between 07/01/2019 and 01/31/2020

**Run Report By** - Select Enroll to run the report filtered by program enroll date fall in the report date range. Select Exited to filtered by the program exit date. Select Enroll at any time to show all the clients still in the program date range.

Report Type: Enroll at any point

**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):

- City of Modesto
- Community Housing and Shelter Services
- Continuum of Care
- Family Promise
- HMIS HACCS
- HMIS Training

**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)
- CHSS EFSP SHELTER
- CHSS Households in Recovery
- CHSS MOD RA RRH
- CHSS STAN HP
- CHSS Support Services
- CHSS TANF/Motel Vouchers

**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)

**Users** - 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:  Filter by User

Report Schedule Report Cancel

To see the names and details #1. click on the +

Clients in Programs Report

7/1/2019 to 1/31/2020

ClientTrack™

**Report Criteria:**

Organizations: Community Housing and Shelter Services

Programs: CHSS TANF/Motel Vouchers

Community Housing and Shelter Services	Enrolled	Exited	Total	Clients
<input checked="" type="checkbox"/> CHSS TANF/Motel Vouchers	11	1	12	12
Organization Total	11	1	12	12
Total	11	1	12	12

ClientTrack™ Reports Page 1 of 1 Patty Estrada 1/9/2020 1:08 PM

You can **view**, **print**, or change to **Excel**, **PDF**, or **Word**

ClientTrack

Report Criteria:  
 Organizations: Community Housing and Shelter Services  
 Programs: CHSS TANF/Motel Vouchers

Community Housing and Shelter Services		Enrolled	Exited	Total	Clients			
CHSS TANF/Motel Vouchers		11	1	12	12			
Name	SSN Last 4	Race	Gender	Age	Enroll Date	Exit Date	Days	Enrollment Length
Conrad, Smith	XXX-XX-7949	White	Trans Male (FTM or Female to Male)	38	10/10/2014		215	1940
Eisenhart, Dana P	XXX-XX-6572	American Indian or Alaska Native	Female	74	9/26/2019		128	128
Lapoint, Roy	XXX-XX-7918	White	Male	65	9/25/2019		129	129
McKenzie, Janis	XXX-XX-9949	White	Female	39	9/30/2019		124	124
Miller, James		Black or African American	Male		9/28/2019		126	126
Nicolas, Happy	XXX-XX-1154	White	Female	5	9/9/2019		145	145
Nicolas, Joy	XXX-XX-0979	White	Female	19	9/9/2019		145	145
Osborn, Robert R	XXX-XX-5563	Black or African American	Male	66	9/28/2019		126	126
Pasual, Abraham	XXX-XX-7918	White	Male	65	9/27/2019		127	127
Paul, Ken	XXX-XX-9946	Black or African American	Male	34	10/24/2014	1/7/2020	191	1902
Steffen, Kathy S	XXX-XX-2159	White	Female	16	9/27/2019		127	127
Steven, James L	XXX-XX-2884	American Indian or Alaska Native	Male	18	9/26/2019		128	128
Program Total		11 still enrolled	1 exited	12 total			12	clients
Organization Total		11	1	12			12	
Total		11	1	12			12	

ClientTrack™ Reports Page 1 of 1  
 Patty Estrada 1/9/2020 1:08 PM

## Service Summary Report

Reports Workspace, open **Menu Navigation**, select **Service Reports**, then choose **Service Summary**

- Reports
- Data Explorer
- Files on Server
- BNLS
- HMIS EXPORTS
- HMIS REPORTS
- ADMINISTRATIVE REPORTS
- CLIENT REPORTS
- ENROLLMENT REPORTS
- REFERRAL REPORTS
- REPORTS
- SERVICE REPORTS
- Service Summary
- Zip Code & County
- Clients Served
- Service Demographic Totals
- Family Demographics Totals

## Complete Date Range, Program, Services, and Report

**Service Summary Report**

Date Range: Predefined Date Range: Previous Quarter  
 Service Date Between: 07/01/2019 and 09/30/2019

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

Organization(s):  
 My Sample Organization  
 Outreach & Engagement Center  
 Salvation Army ESG  
 STANCO

**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)  
 CES Coordinated Access  
 TSA Emergency Shelter  
 TSA Shelter STAN ESG  
 TSA VA GPD

**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  
 Child care (511)  
 Consumer Life Skills/Advocacy (22)  
 Criminal Justice/Legal Service (25)  
 Day Care (27)  
 Do you have any pets? If yes, number and dogs or cats? (644)  
 Education (28)

**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)

**Housing Status** - You may filter the results by clients with specific housing statuses.

Housing Status:  Filter by Housing Status

Report Schedule Report Cancel

To see the detail of the service, Click on the Service (“ Employment”) to view the clients’ names under that service.

**Service Summary**  
 7/1/2019 to 9/30/2019

**Report Criteria:**  
 Organizations: Salvation Army ESG  
 Services: Multiple  
 Programs: TSA Emergency Shelter

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
Employment	1	1.00	\$0.00	1	1	0	1	0	1
Duplicated Total	1	1.00	\$0.00	1	1	0	1	0	1
<b>Unduplicated Totals</b>	<b>1</b>	<b>1.00</b>	<b>\$0.00</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>

ClientTrack™ Reports Page 1 of 1  
 Kayleigh Partain 10/22/2019 12:00 PM

It will show the detail of the clients’ names, then you can click on the + by the name and it will detail family members, if the client has any.

You can then export to Excel, PDF, Word, and Print and Save.

The screenshot shows a web browser window displaying a 'Service Summary' report for the period 7/1/2019 to 9/30/2019. The report is for 'Salvation Army ESG' and includes a table of employment data. A red oval highlights the 'Excel', 'Excel Data', 'PDF', and 'Word' export options in the top right corner. Another red oval highlights the 'Client Name' and 'Service Date' columns in the table.

**Service Summary**  
7/1/2019 to 9/30/2019

**Report Criteria:**  
Organizations: Salvation Army ESG  
Services: Multiple  
Programs: TSA Emergency Shelter  
First Time Served: N/A

**Employment**

Client Name	Service Date	Units	Total	Undup. Clients	Families	Children in Families	Adults in Families	Seniors in Families	Individuals in Families
McNeal, Nancy	9/20/2019	1.00	\$0.00	1	1	0	1	0	1
<b>Unduplicated Totals</b>		<b>1.00</b>	<b>\$0.00</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>

ClientTrack™ Reports Page 1 of 1 Kayleigh Partain 10/22/2019 12:01 PM

The screenshot shows a help window titled 'Help for Service Summary Report'. It contains detailed information about the report's filters and data definitions.

**How filters are applied**  
The program filter is applied such that the client that is enrolled in the program at the period of time of the service will be included if program the client is enrolled into selected.

**How this are defined**  
The count of family members and their demographic information is dependent upon the client's current family at time of service. For clients not in family at time of service the service is counted as single person family.

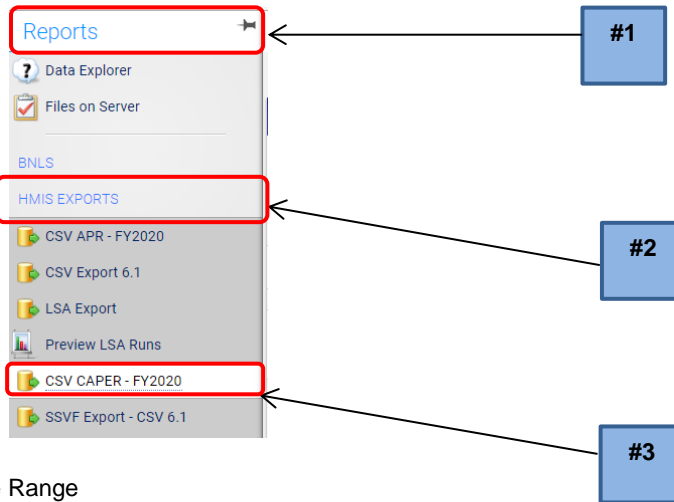
**In the summary information column definitions:**

- Entries** - Count of all services provided.
- Units** - sum of all the units provided for the service.
- Total Value** - Sum of values for services provided of that service type
- Clients** - Count of clients who received the service
- Household** - Count of Families served
- Adults** - Count of all members of family or single persons 18 years and older at time of service.
- Child** - Count of all members of family or single persons under the age of 18 at time of service.
- Senior** - Count of all members of family or single persons who are the senior age and older at time of service. The Senior age is as entered on the launch form or 65 if it is not visible on the form.

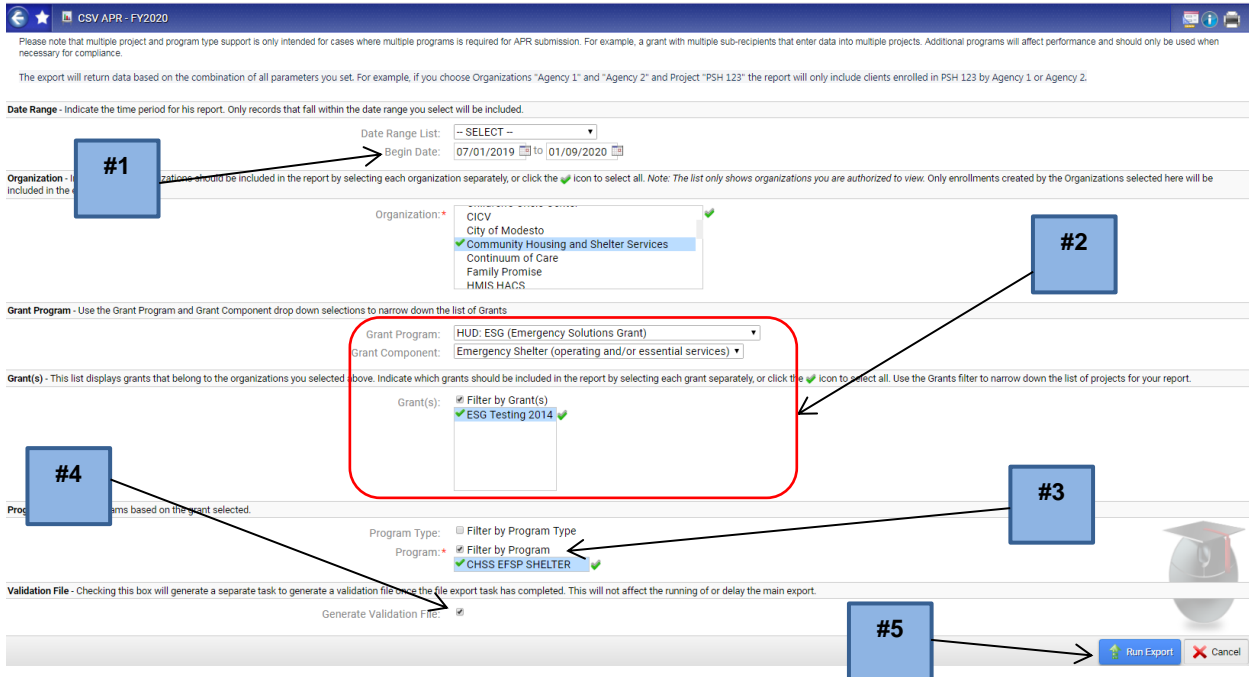
More Help Close

# Emergency Solutions Grant (ESG) CAPER Export

From the Reports Workspace>HMIS Exports>CSV CAPER-FY2020

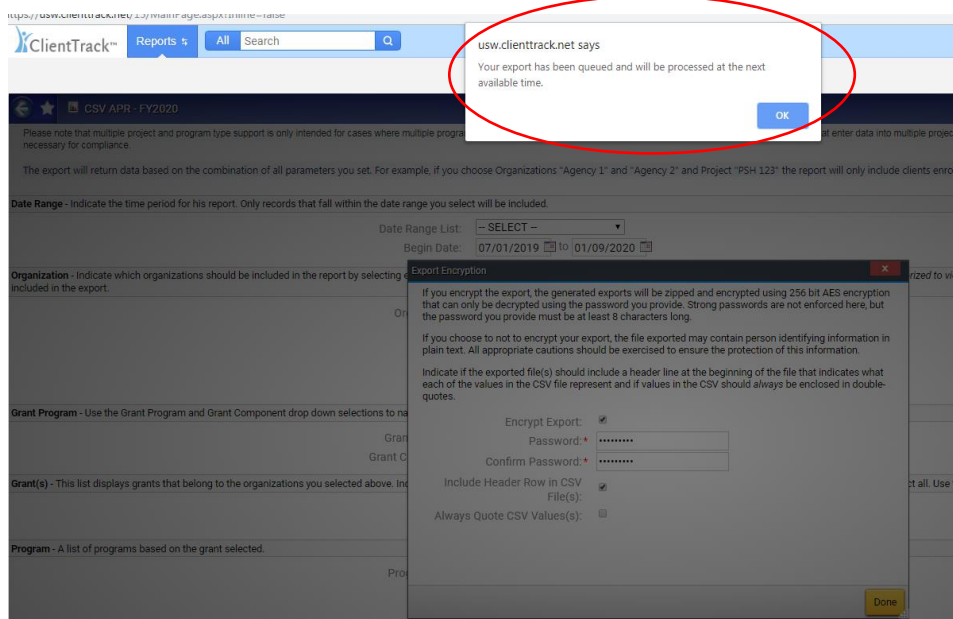
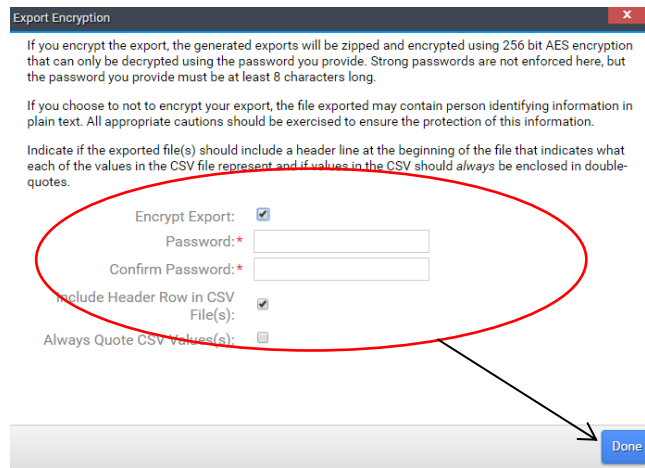
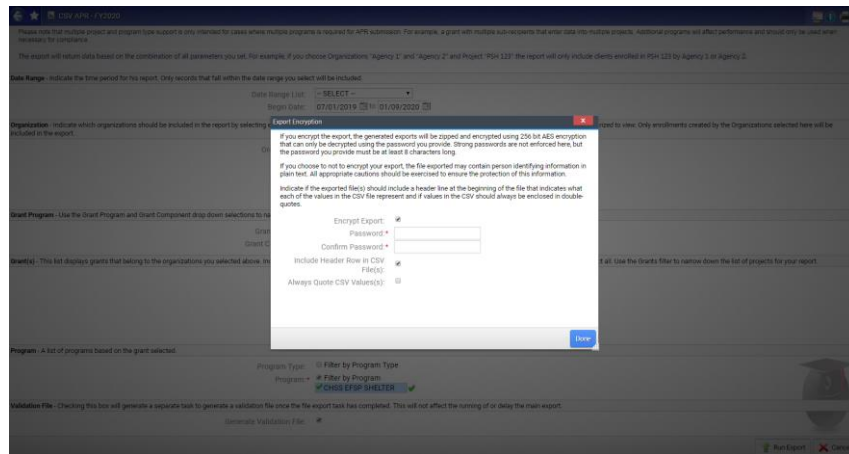


- #1. Select Begin Date Range
- #2. Choose Grant Program, Component, and Grants
- #3. Choose Program
- #4. Check Generate Validation File
- #5. Run Report

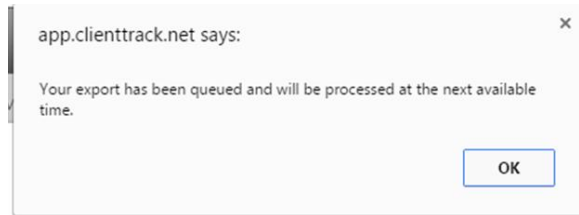
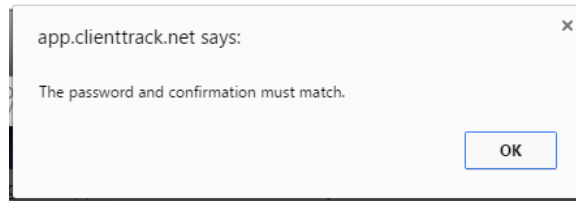




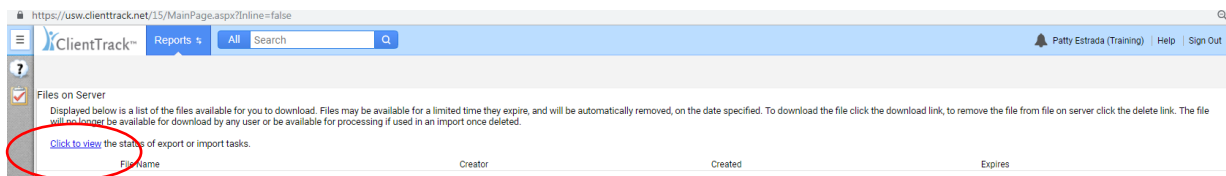
You will have to create a Password, keep the **Encrypt Export** and **Include Header Row in the CSV Files** boxes checked, you have the option to check Always Quote CSV Values but this is not necessary, see descriptions below. Then click Done.



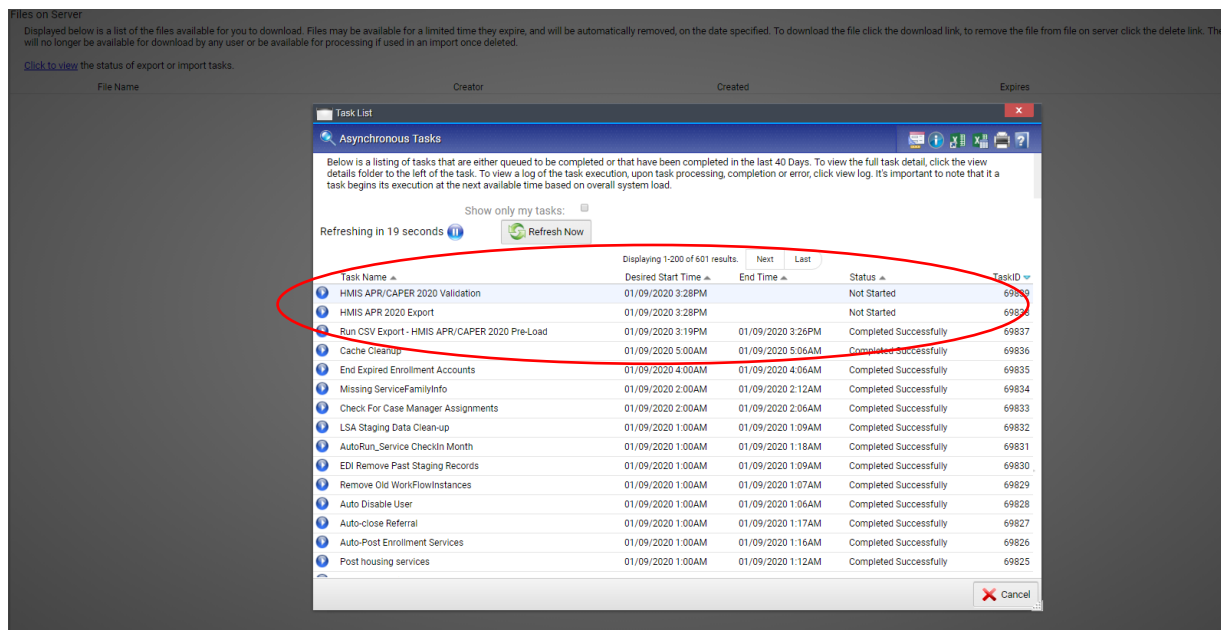
You will be prompted if there are issues or if your export has been queued. **\*Note:** It can take up to 20 minutes or longer to run each Export.



To verify the report is running, click on the “Click to view”



This will bring up the Asynchronous Tasks list. Here you can see the status of your report: Not Started, Processing, or Completed Successfully



**Task List**

Asynchronous Tasks

Below is a listing of tasks that are either queued to be completed or that have been completed in the last 40 Days. To view the full task detail, click the view details folder to the left of the task. To view a log of the task execution, upon task processing, completion or error, click view log. It's important to note that it a task begins its execution at the next available time based on overall system load.

Show only my tasks:

Refreshing in 15 seconds

Displaying 1-200 of 601 results. Next Last

Task Name	Desired Start Time	End Time	Status	TaskID
HMIS APR/CAPER 2020 Validation	01/09/2020 3:28PM		Not Started	69839
HMIS APR 2020 Export	01/09/2020 3:28PM		Processing	69838
Run CSV Export - HMIS APR/CAPER 2020 Pre-Load	01/09/2020 3:19PM	01/09/2020 3:26PM	Completed Successfully	69837

**Note:** While the report is generating, you may perform other task within other workspaces in ClientTrack, this will not interrupt the report process.

To check if your report is ready, you can find it by selecting: **Reports Workspace > Reports > Files on Server**

The screenshot shows the ClientTrack interface. In the left-hand navigation pane, 'Files on Server' is highlighted with a red circle. The main content area shows a 'Welcome' message for Patty Estrada, followed by information for the City of Modesto, Stanislaus County. Below this is a table for 'Current Program Enrollments' and a corresponding bar chart.

Program	Cases	Clients
CHSS BHRS	5	10
CHSS CA Stabilization Program RRH	4	16
CHSS Households in Recovery	12	41
CHSS HUD 3 HC	1	2
CHSS MCD HP	1	1
CHSS PSH FAM with CHILD #1	3	8
CHSS PSH FAM with CHILD #2	5	14
CHSS TANF/Model Vouchers	37	114
CHSS WHSP	15	61

**\*Note:** Files On Server can also be accessed by selecting My Saved Reports > Files on Server

Once the correct report is showing, click on the Green Arrow to Run the Report

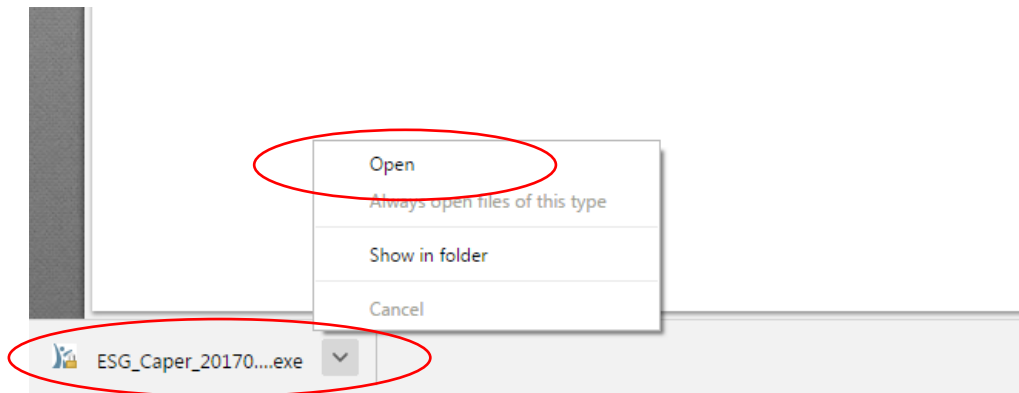
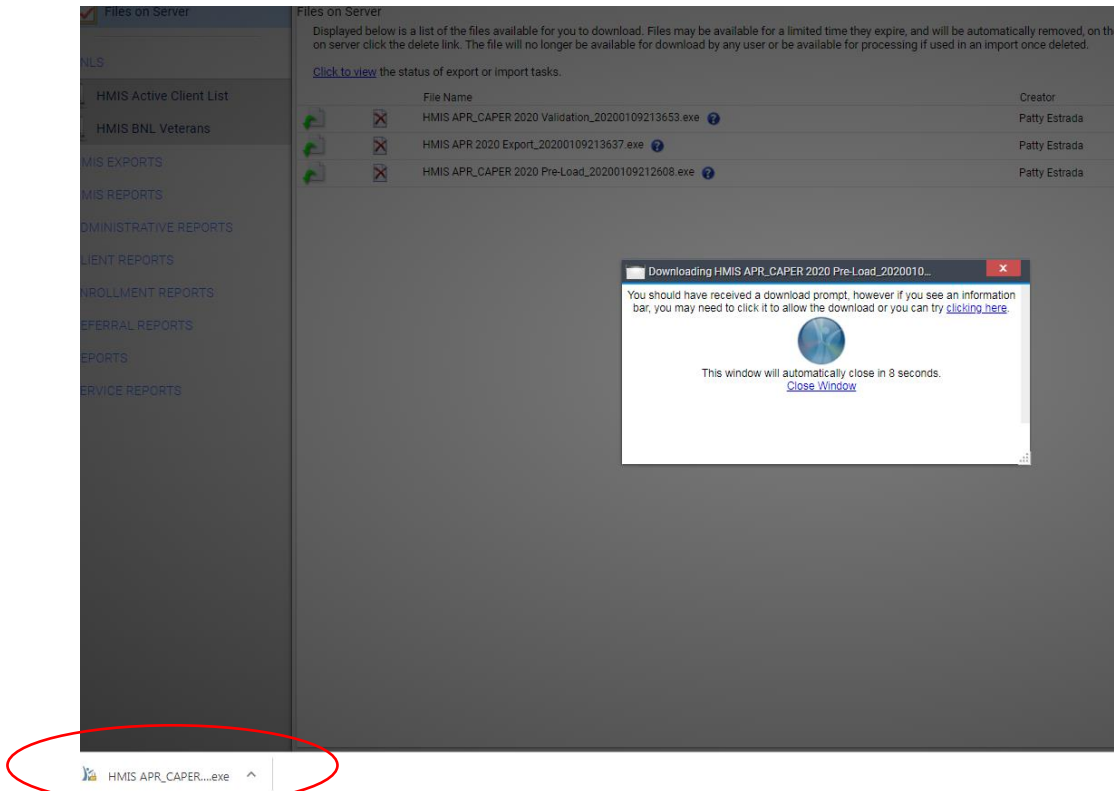
Files on Server

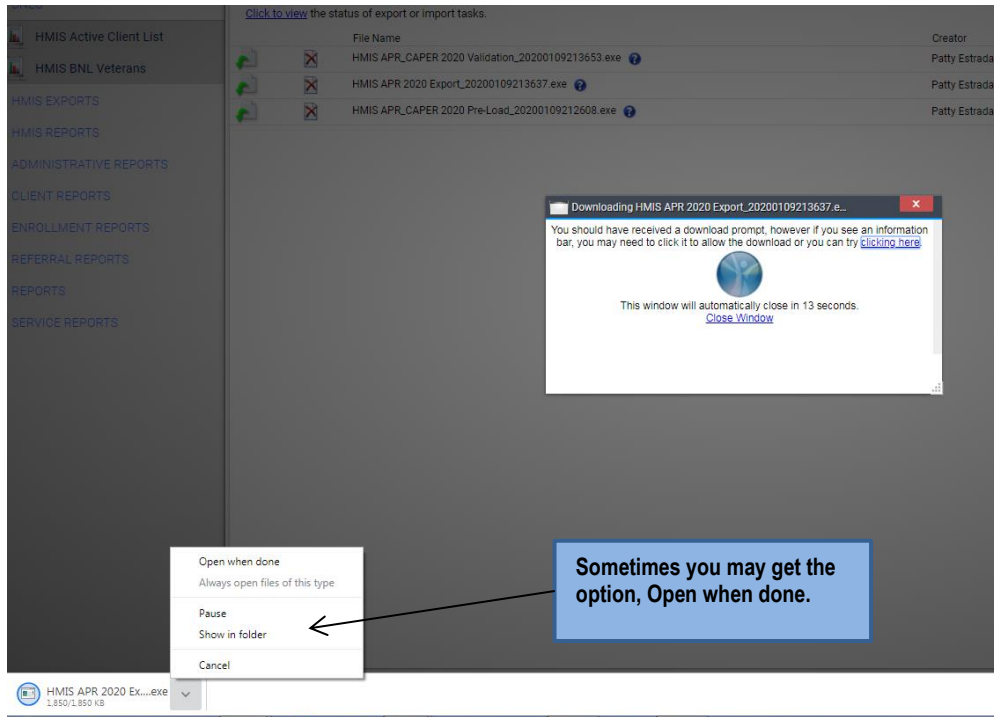
Displayed below is a list of the files available for you to download. Files may be available for a limited time they expire, and will be automatically removed, on the date specified. To download the file click the download link, to remove the file from server click the delete link. The file will no longer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

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

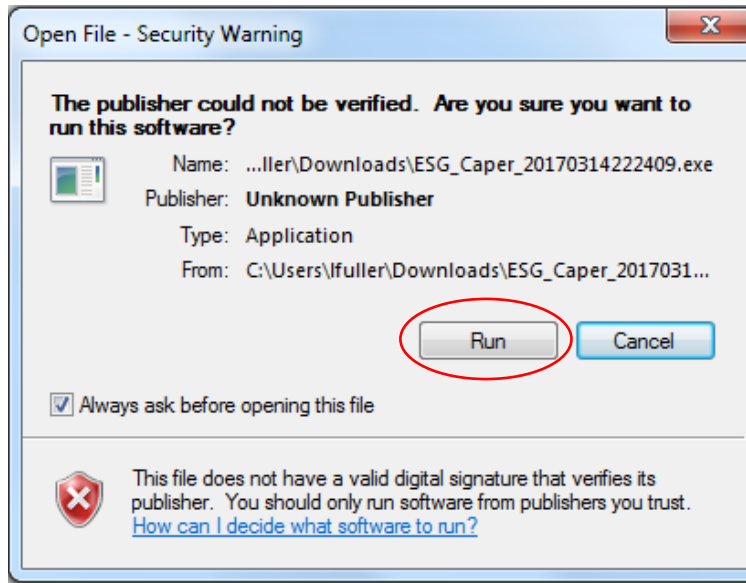
File Name	Creator	Created	Expires
HMIS APR_CAPER 2020 Validation_20200109213653.exe	Patty Estrada	1/9/2020 9:36:54 PM	2/8/2020 9:36:54 PM
HMIS APR 2020 Export_20200109213637.exe	Patty Estrada	1/9/2020 9:36:40 PM	2/8/2020 9:36:40 PM
HMIS APR_CAPER 2020 Pre-Load_20200109212608.exe	Patty Estrada	1/9/2020 9:26:09 PM	2/8/2020 9:26:09 PM

The report will begin to download, once complete, you will click to open the file.





Click on Run, Security Warning, click on "Run"

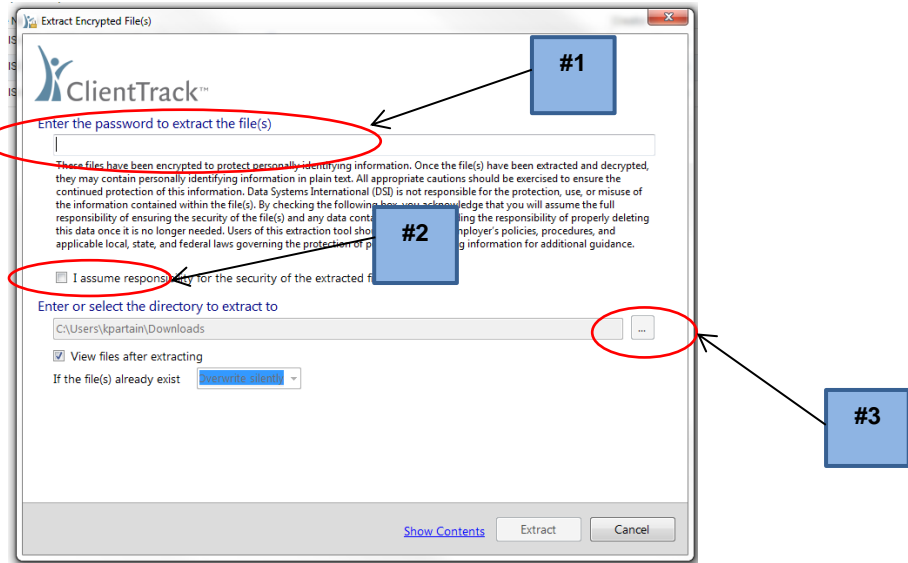


You will then be prompted to:

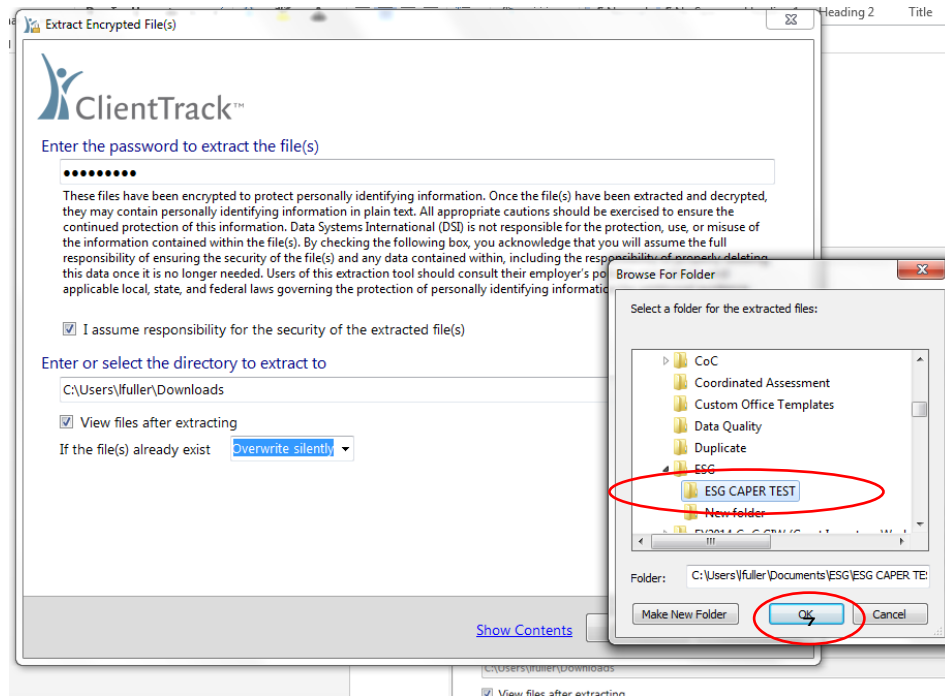
**#1.** Put in the Password you created

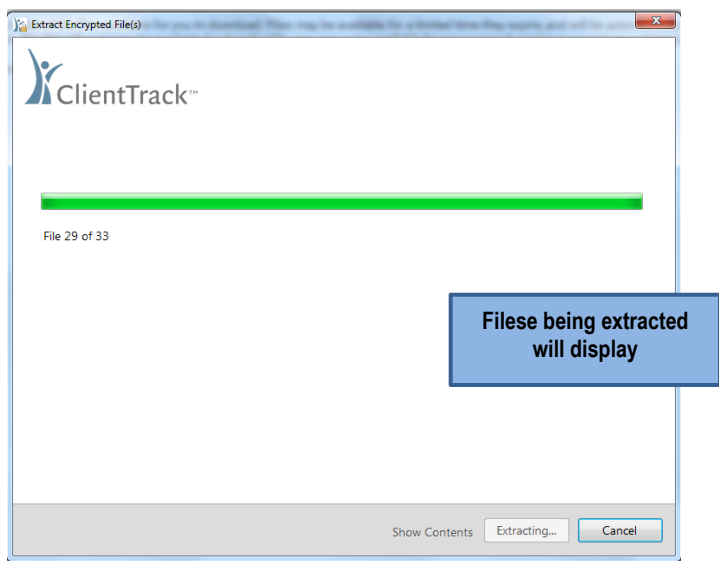
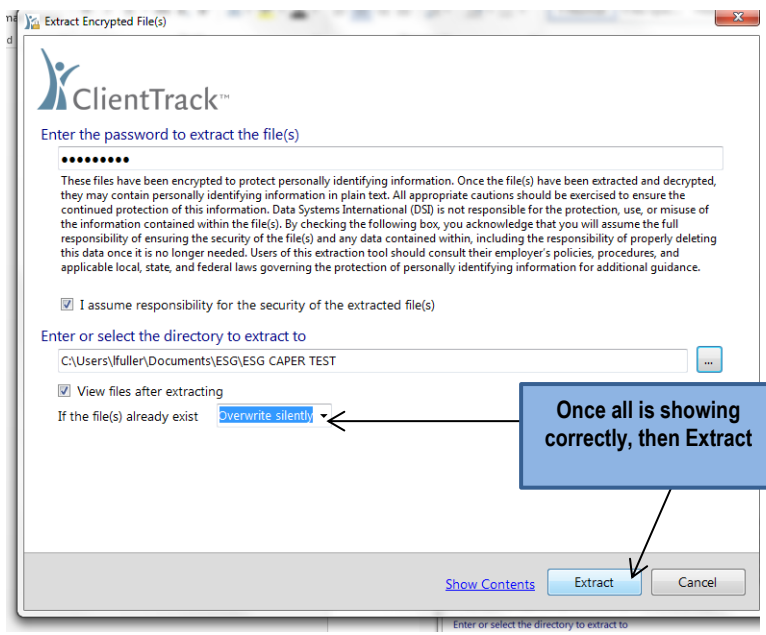
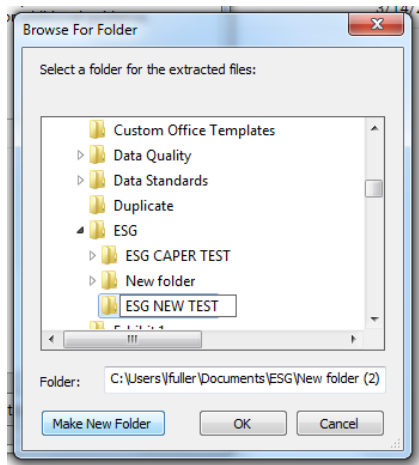
**#2.** Mark "I assume responsibility for the security of the extracted file(s)"

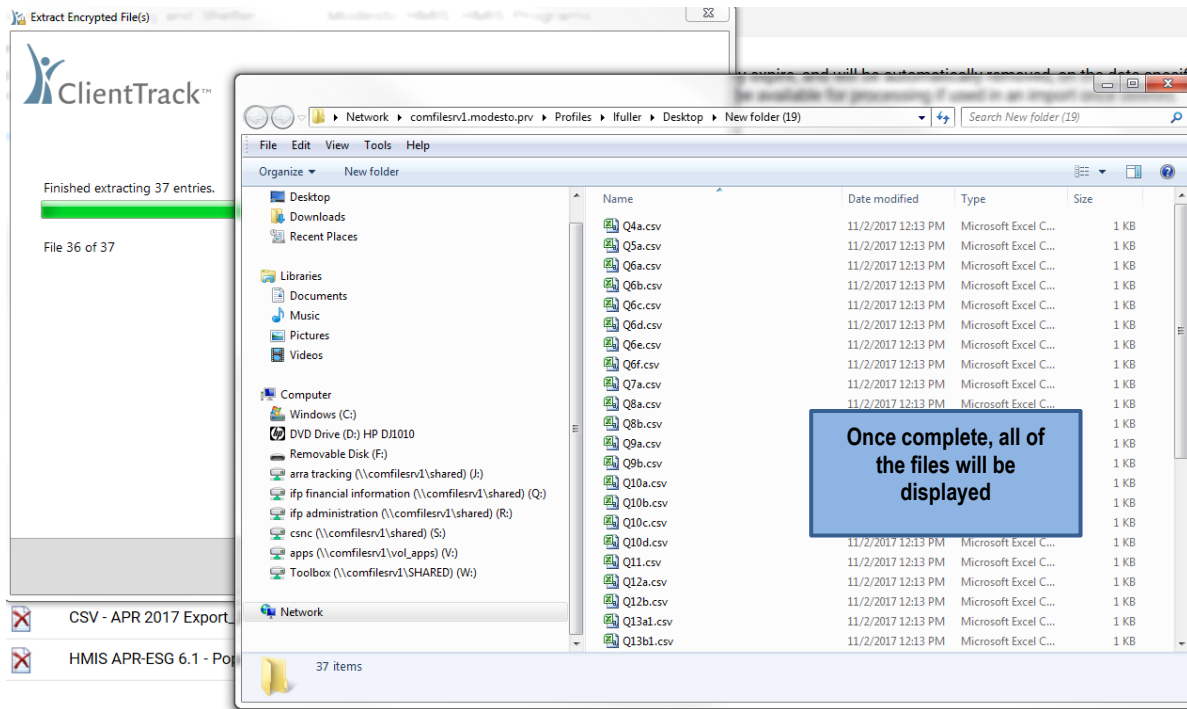
**#3.** Tell the system where you want the extracted file to go before you extract the file



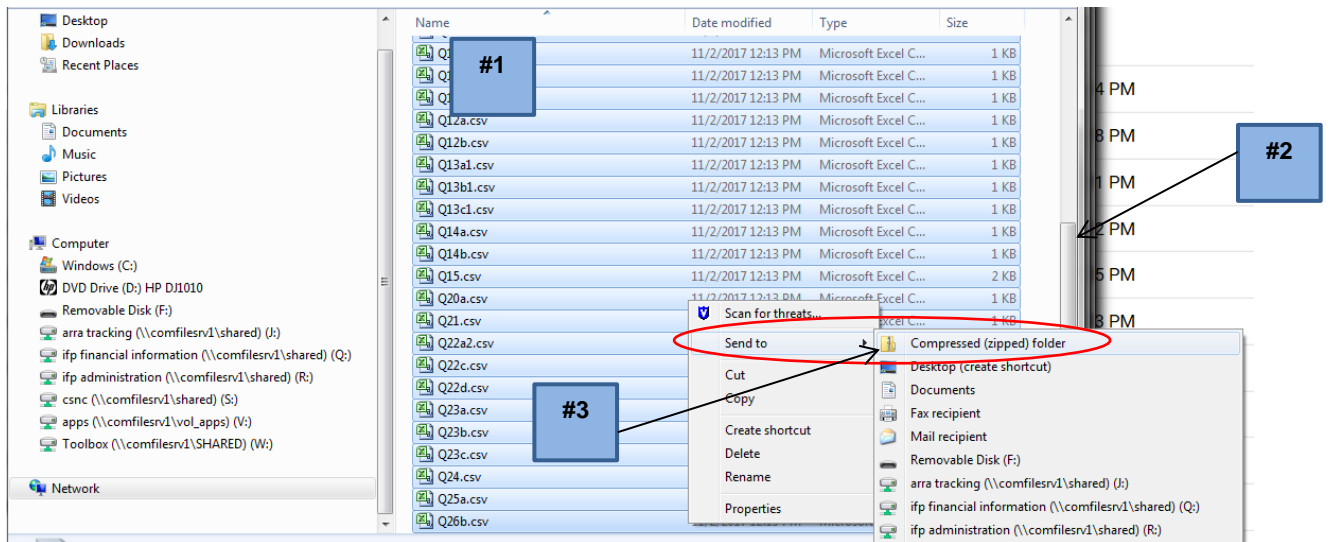
You can create a new folder by clicking **Make New Folder**, then once it is highlighted on the folder you want, click **OK**



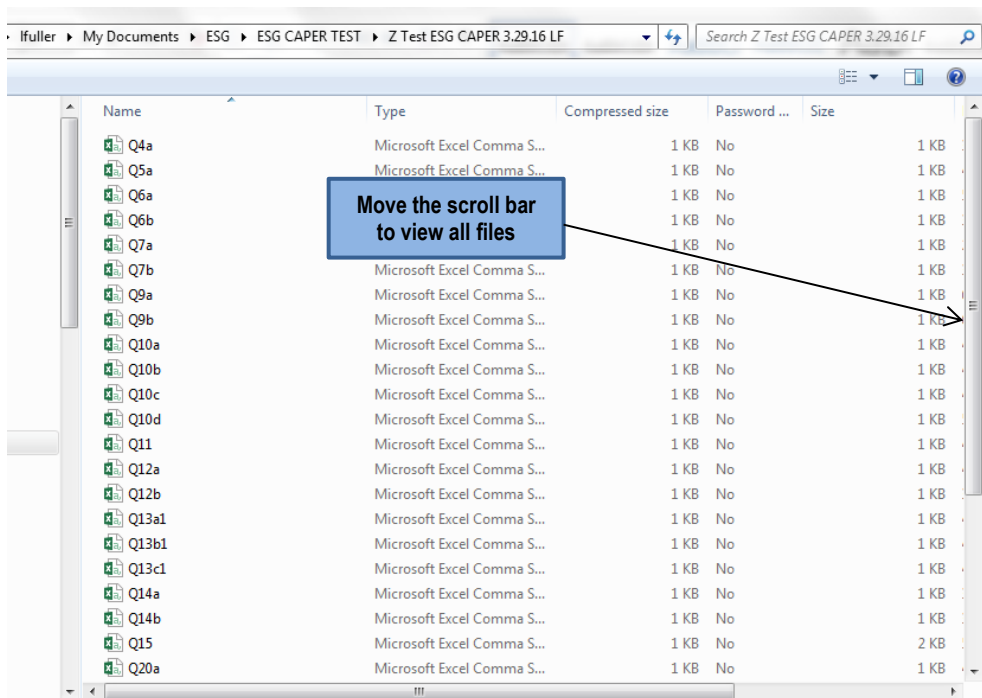
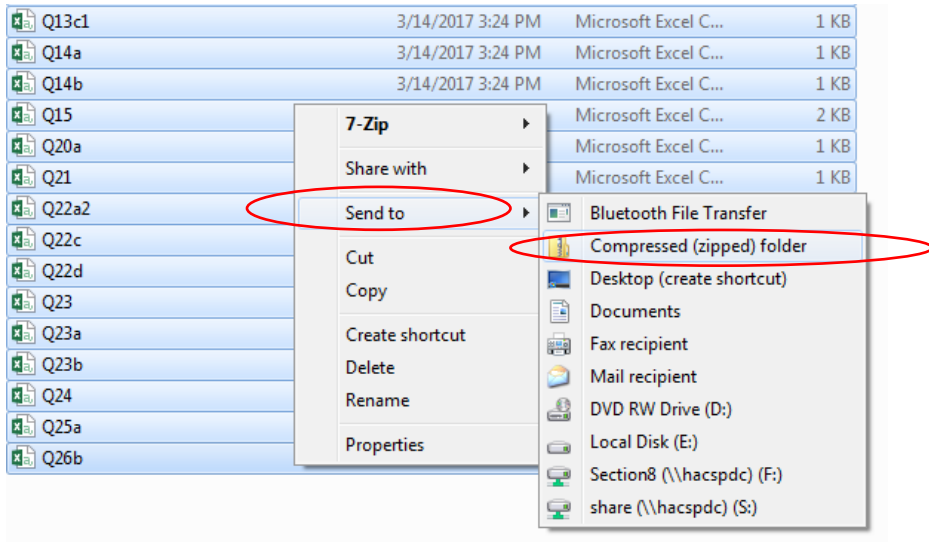




- Zip the File: #1.** Highlight all of the Q files by holding your CTRL key and click on each of the files  
**#2.** Make sure to move your arrow down to include all of them  
**#3.** Right click on mouse to send to Compressed (zipped) folder

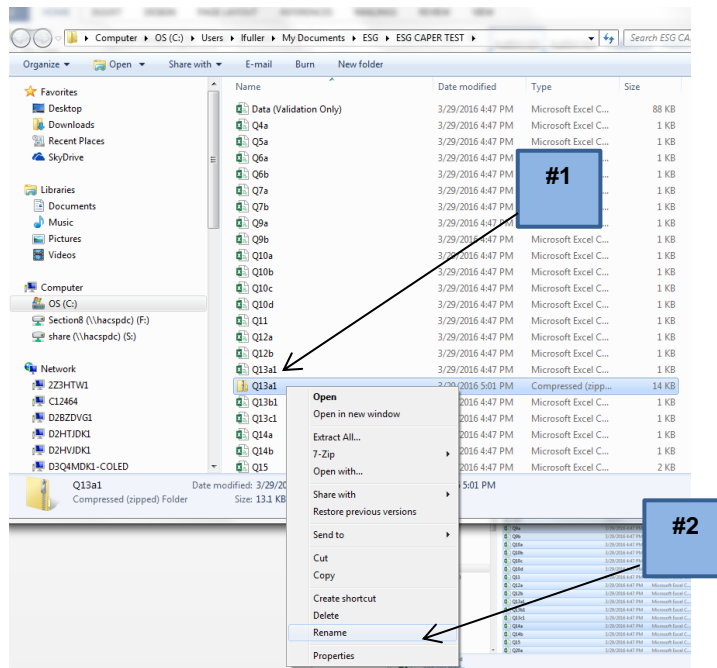




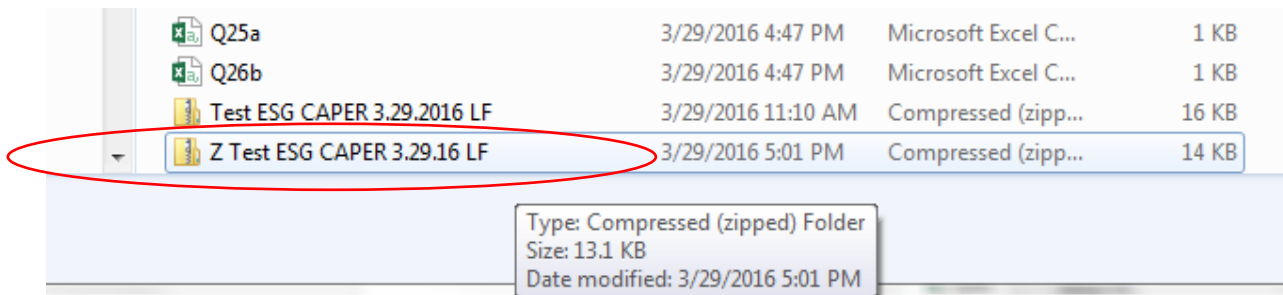


Your file will be zipped but you will have to rename the file.

- #1. Highlighting the file, right click
- #2. Rename



Once you rename your file it will move into Alphabetical Order



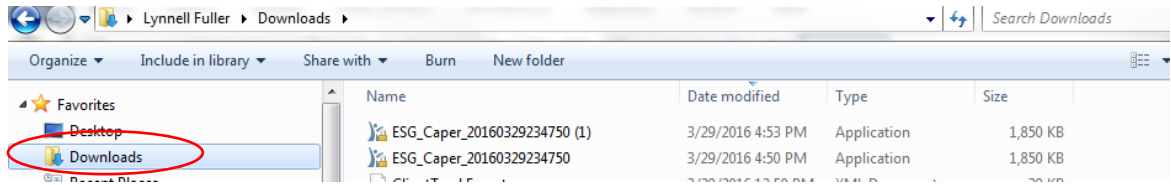
Once file is zipped you can then email by going to your Documents Library to find the file and attach to email **DO NOT OPEN ZIP FILE** it will change the format & not upload correctly

REFER TO HUD: Emergency Solutions Grant Consolidated Annual Performance and Evaluation Report (HMIS Programming Specifications) For Report Details

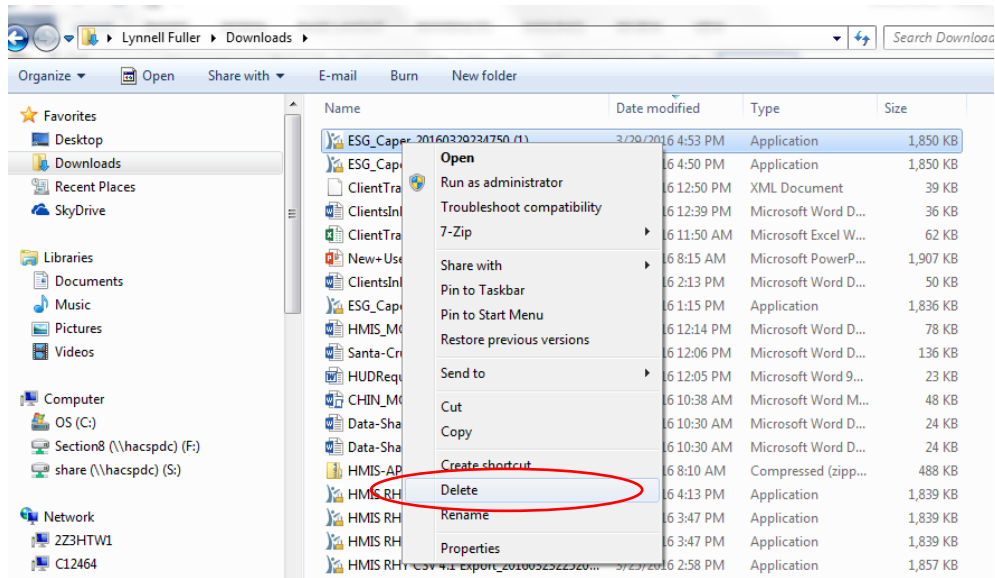
<https://www.hudexchange.info/resource/4696/hmis-programming-specifications/>

**MOST IMPORTANT:** You must then delete the file from Downloads and clear your recycle bin. You should never save or keep the file to your COMPUTER. The zip file will remain in your documents, under the file you created ONLY!!

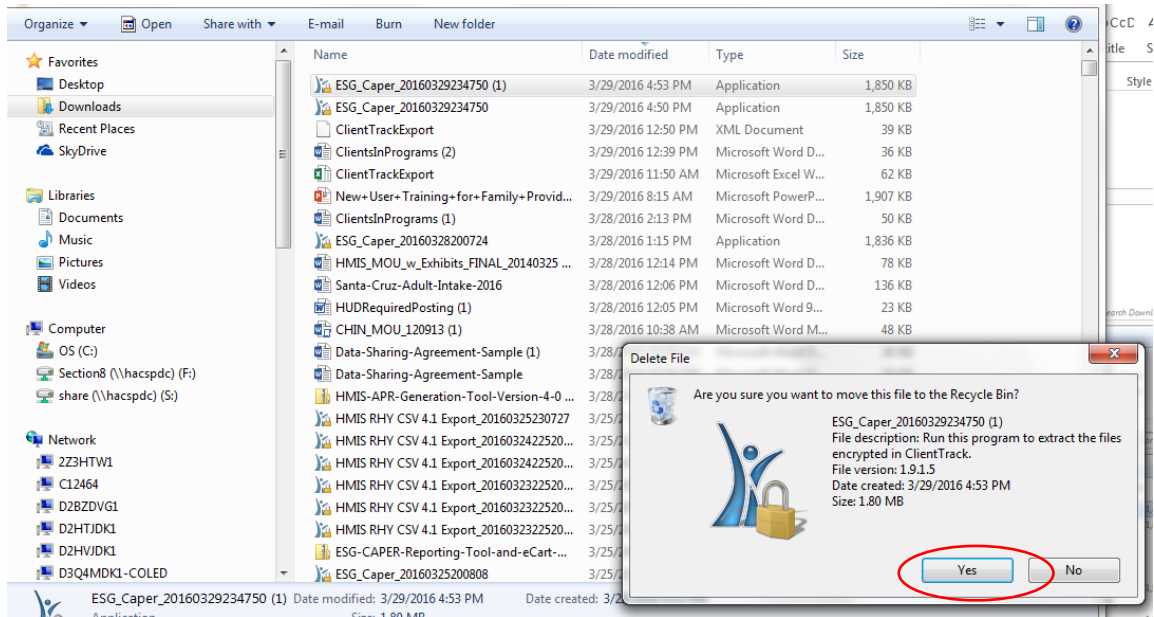
## Bring up your Downloads



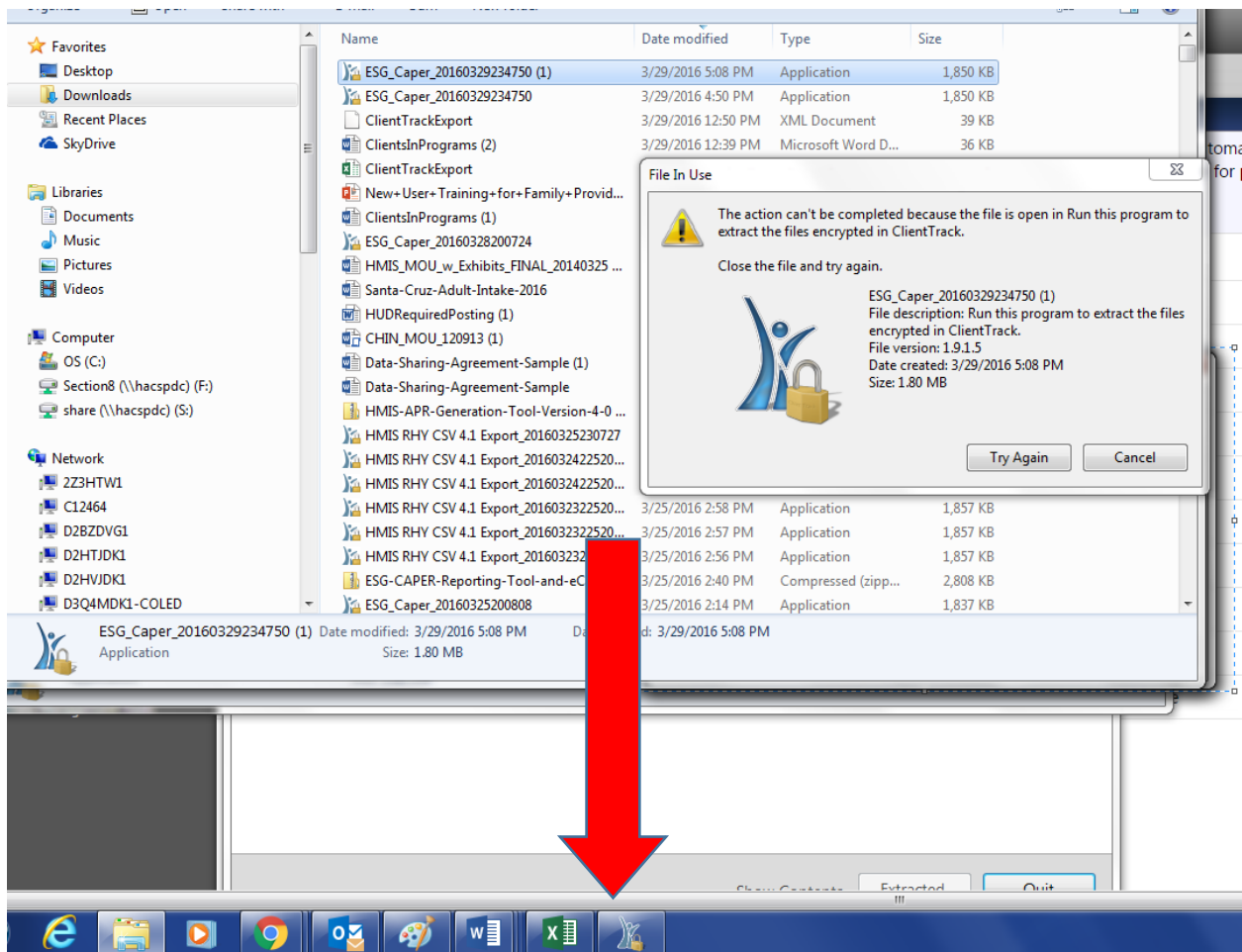
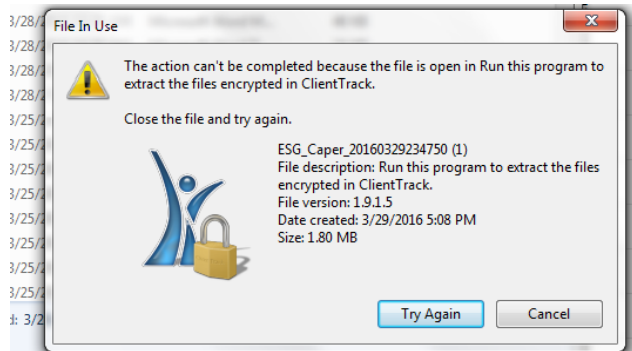
All of your downloaded files will appear, highlight the ESG CAPER, right click, and delete



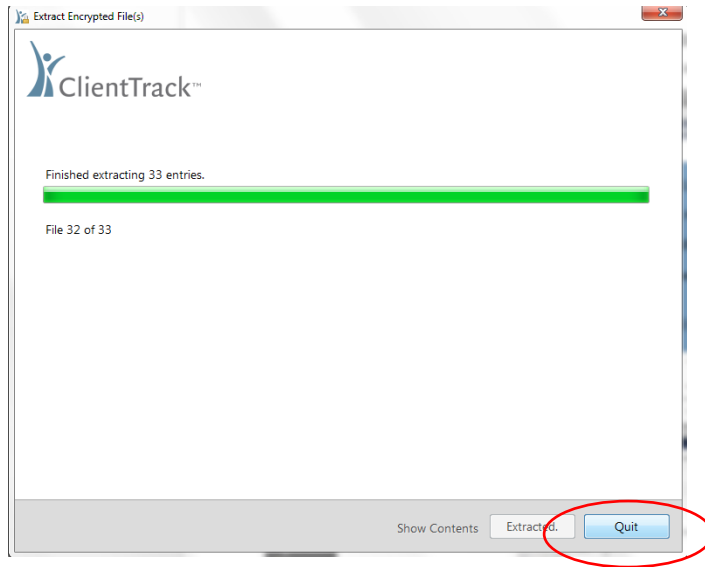
It will ask if you are sure you want to move the file(s) to the Recycle Bin. Select Yes.



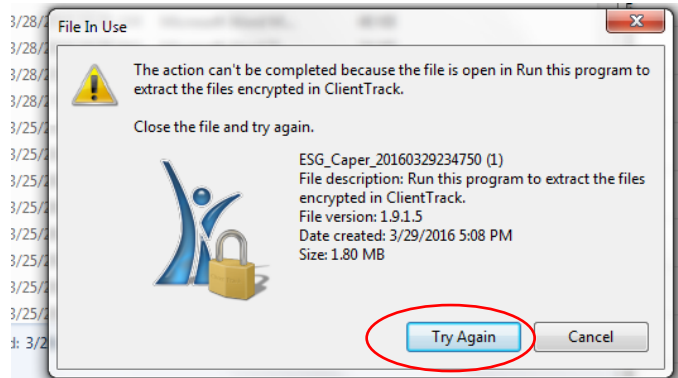
You may get an error that the action can't be completed because the file is open in Run, you will have to click on the window tab at the bottom of your computer to bring up the locked running file



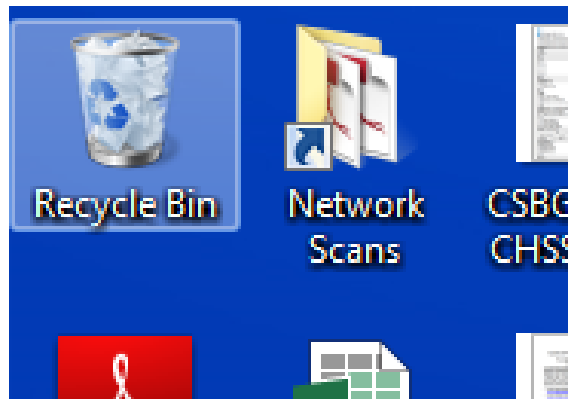
Once the Extract Encrypted Files screen is showing click on Quit



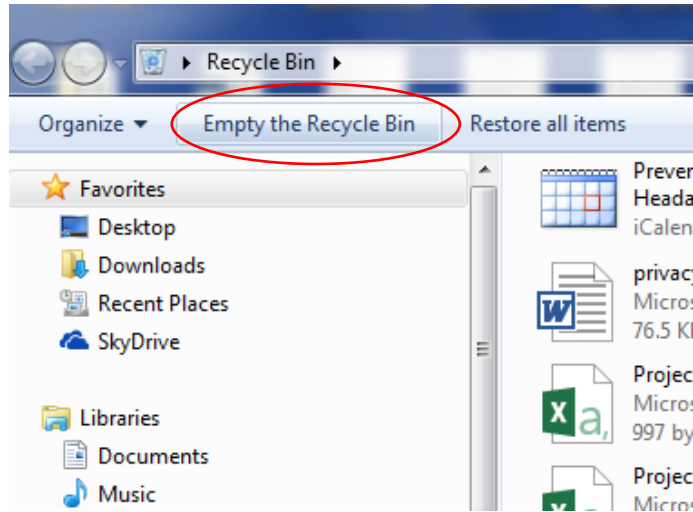
Then Try Again



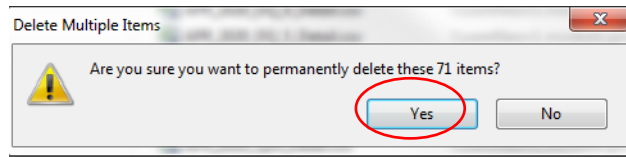
Go to your Recycle Bin on your computer desktop



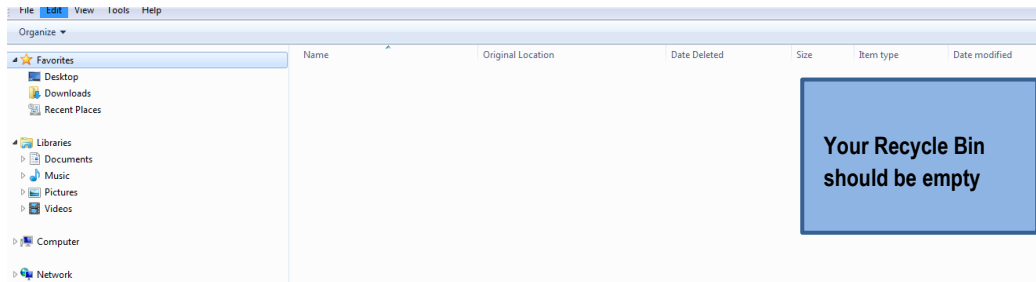
Select Empty the Recycle Bin



You will be prompted: "Are you sure you want to permanently delete all of these items?"



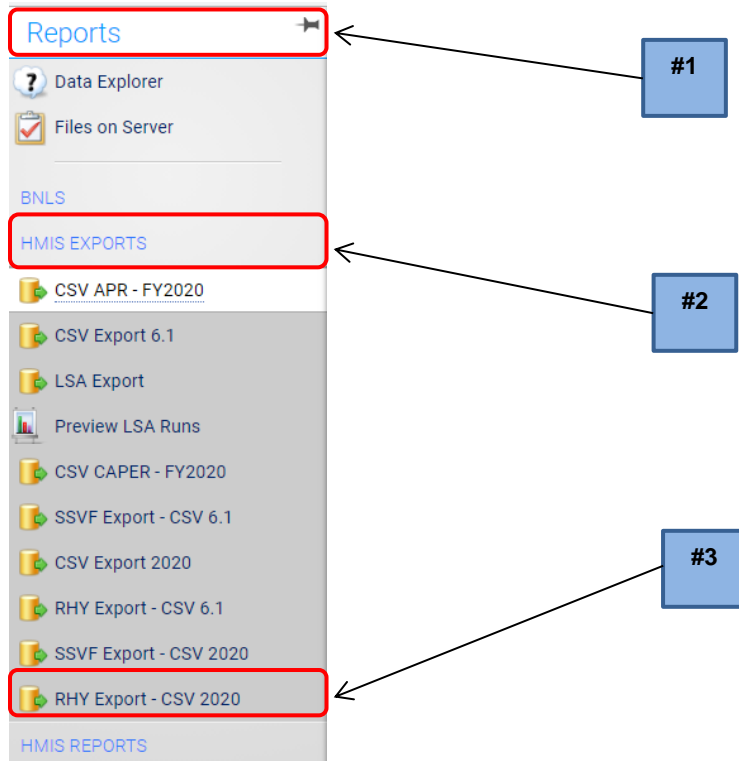
When you have completed the process, your Recycle Bin should be empty



**You have completed running the ESG CAPER Report!**

## RHY Export

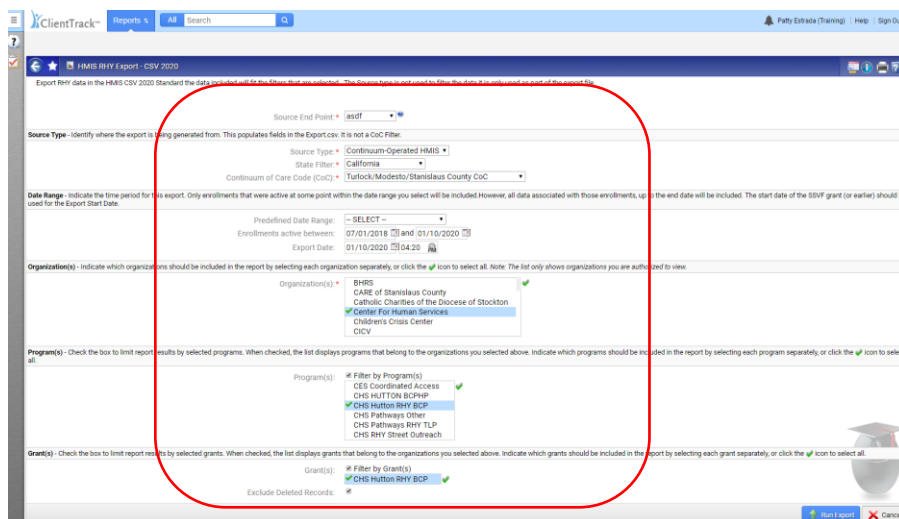
The export is located in the Reports Workspace: Menu **Reports>HMIS Exports>RHY Export 2020**



When the report is launched, the system confirms



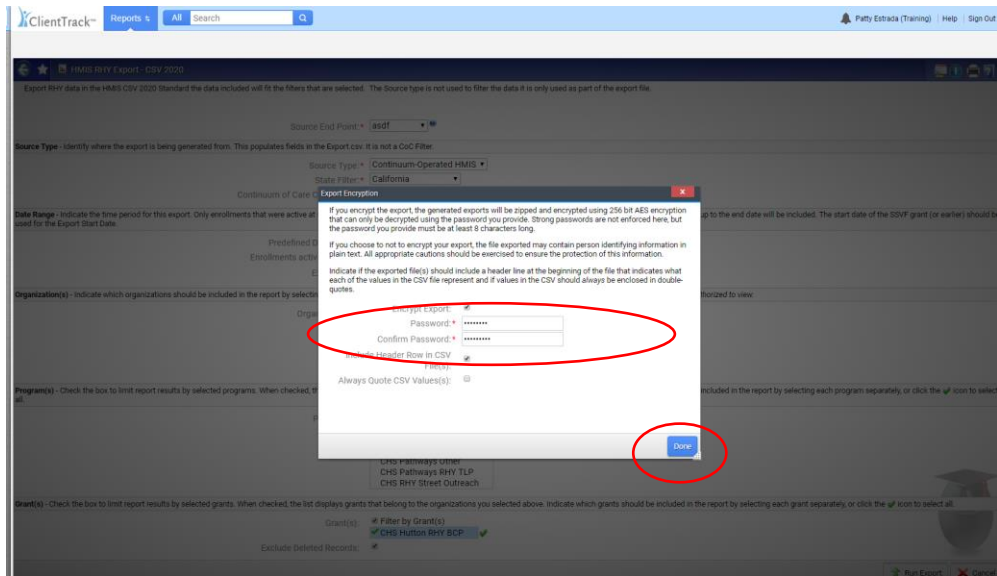
Add the **Source End Point**, **Source Type**, and **Enrollment active between Dates**, which are from the start of the grant period, which will default to the date that you are running the report, **DO NOT** change the Export Date as the date must be the same date that you upload the data, the **Organization** will be defaulted, you will click on the **Programs** which need to be included in the report and the **Grant**, leave the **Exclude Deleted Records** checked.



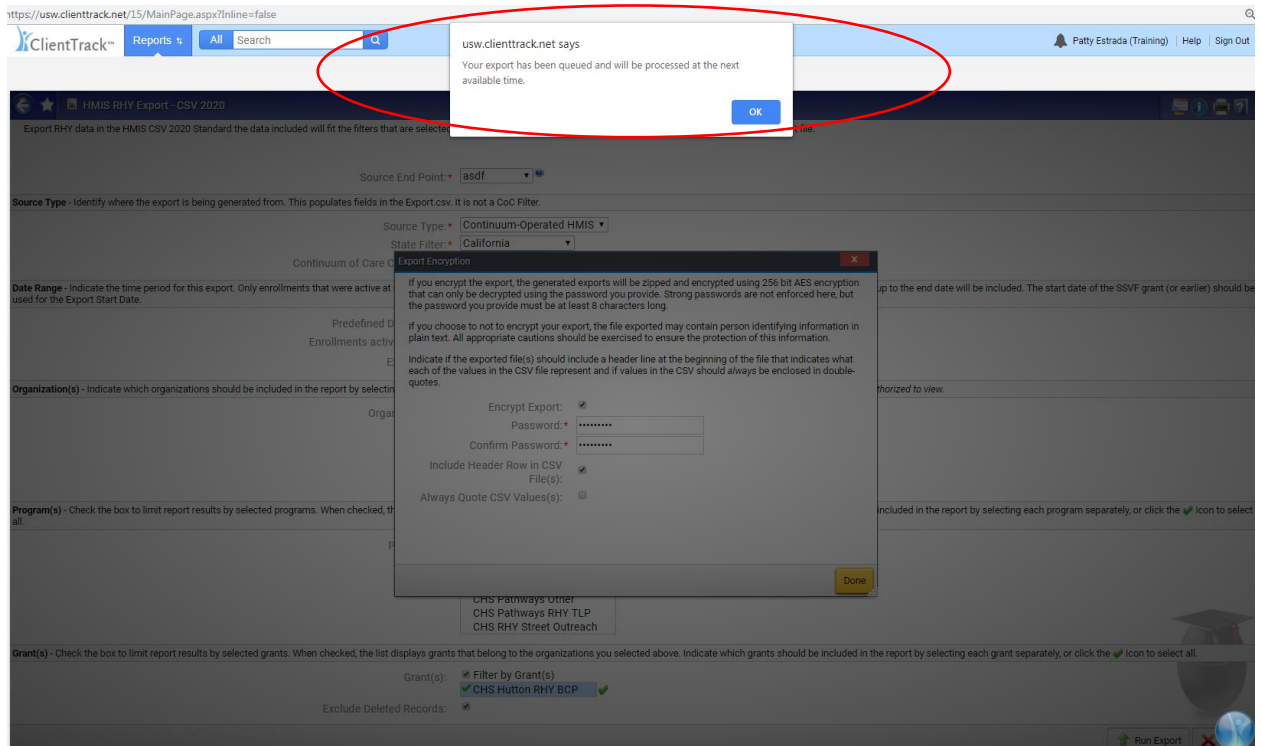


**Please NOTE: It can take up to 20 minutes to run each Export**

You will then have to create a Password, once confirmed, click Done

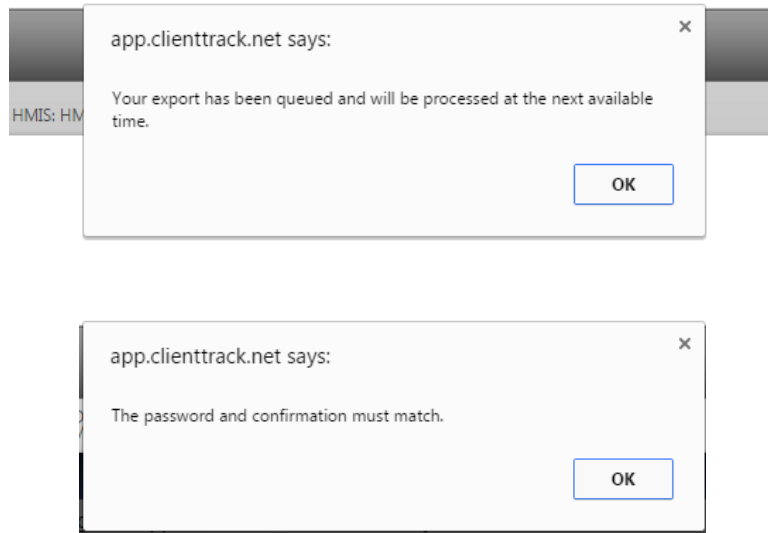


A window will appear giving you the status of your request.

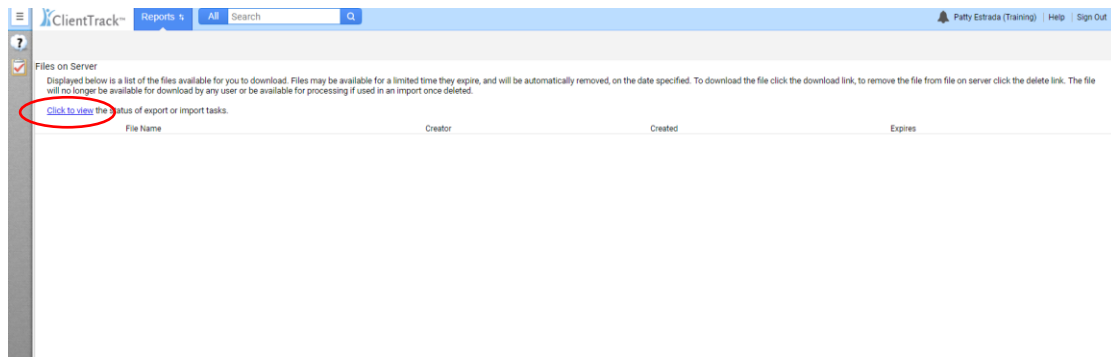




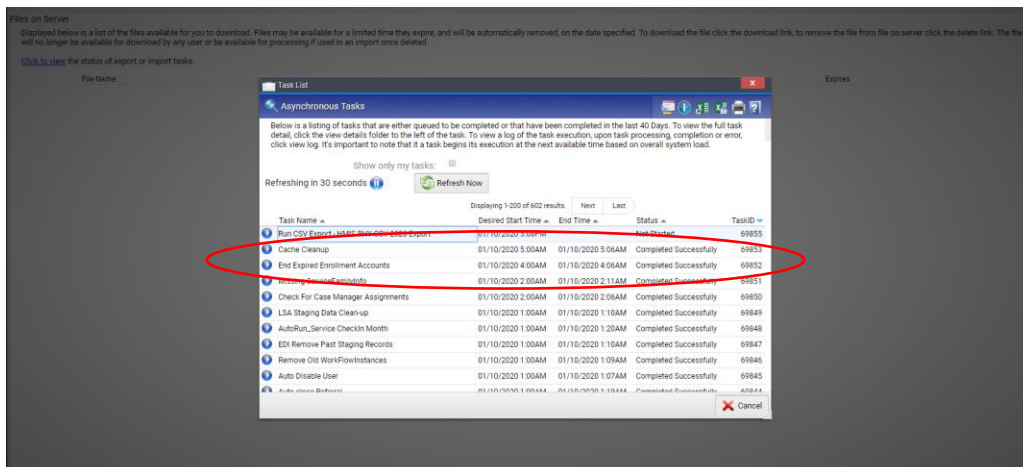
You will be prompted that your export has been queued or if there are any issues.



To check if it is running click on the “Click to view”

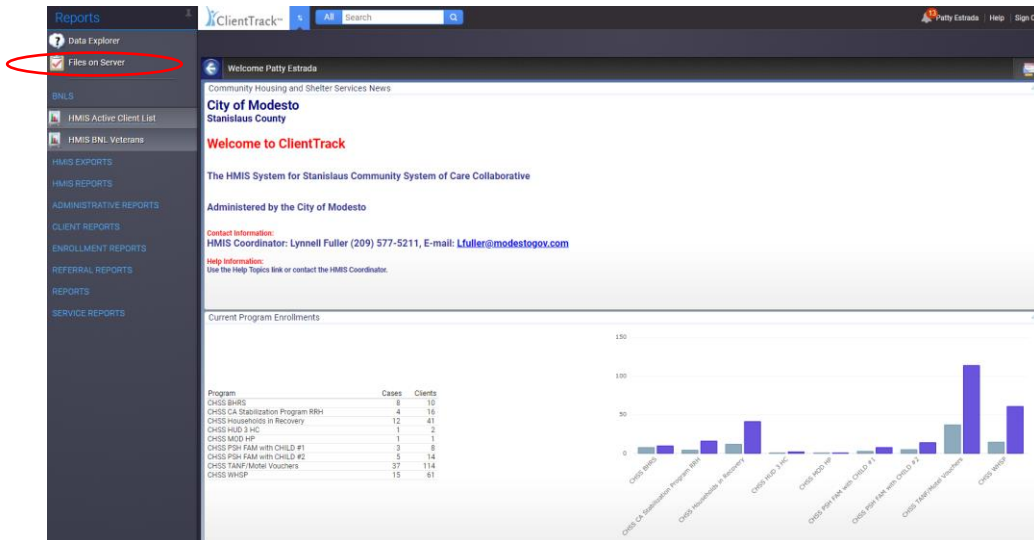


This will bring up the Asynchronous Tasks list. Here you can see the status of your report: Not Started, Processing, or Completed Successfully

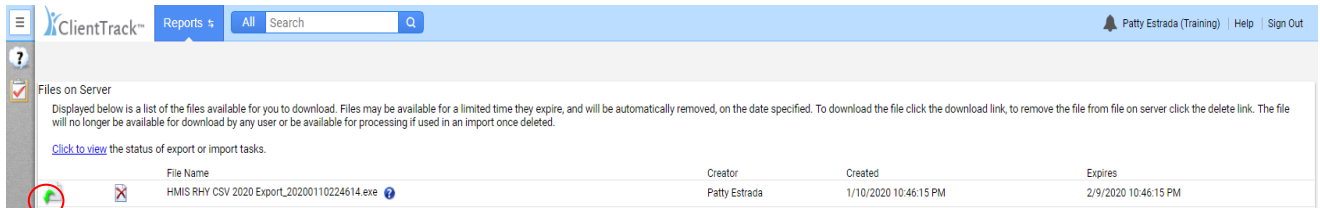


**Note:** While the report is generating, you may perform other task within other workspaces in ClientTrack, this will not interrupt the report process.

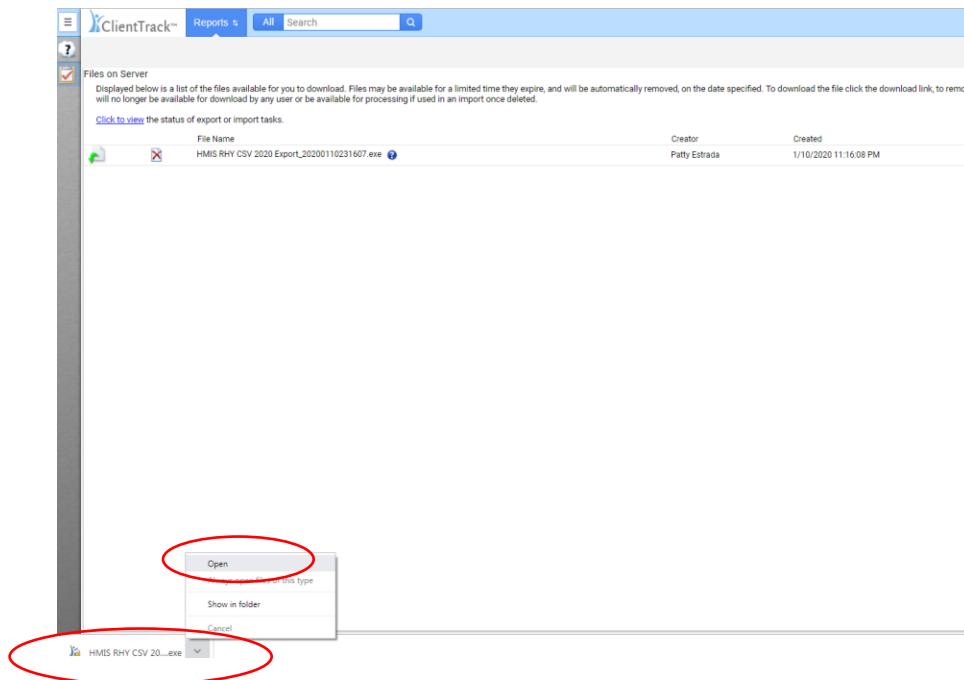
To check if your report is ready, you can find it by selecting: **Reports Workspace > Reports > Files on Server**



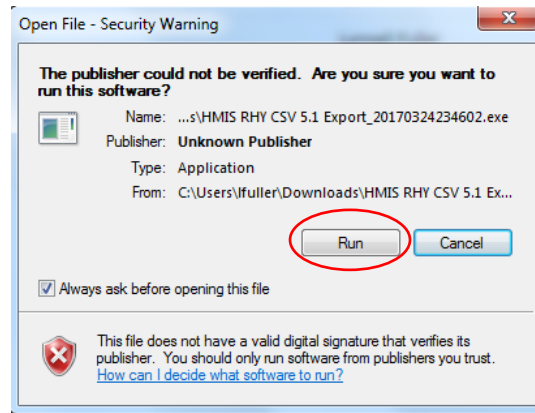
From the Files on Server, click on the green download arrow



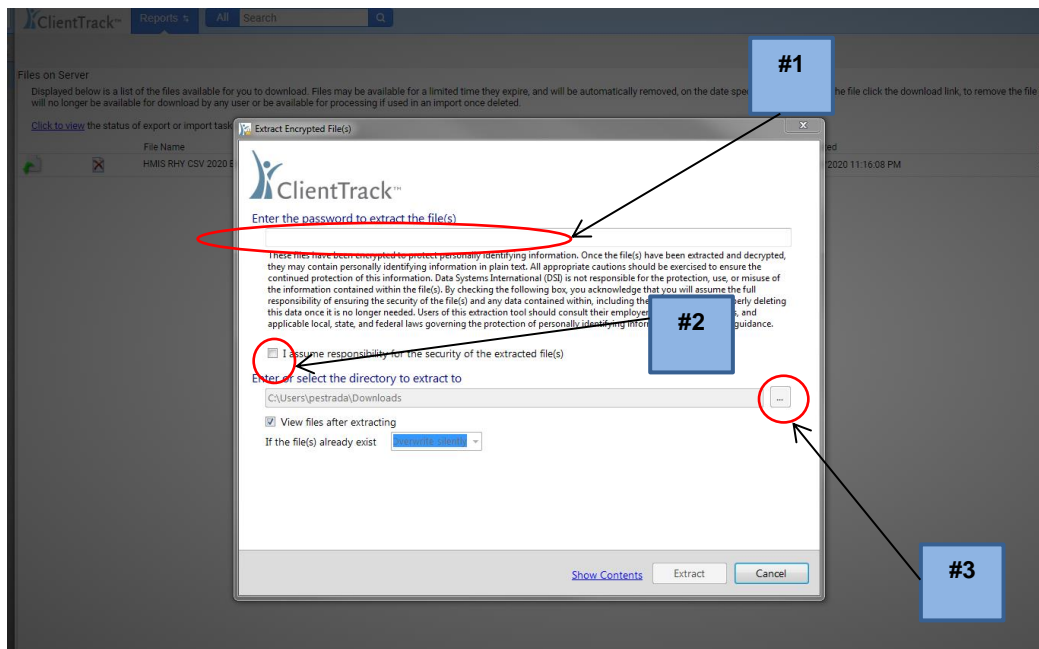
The Report will download, click on open

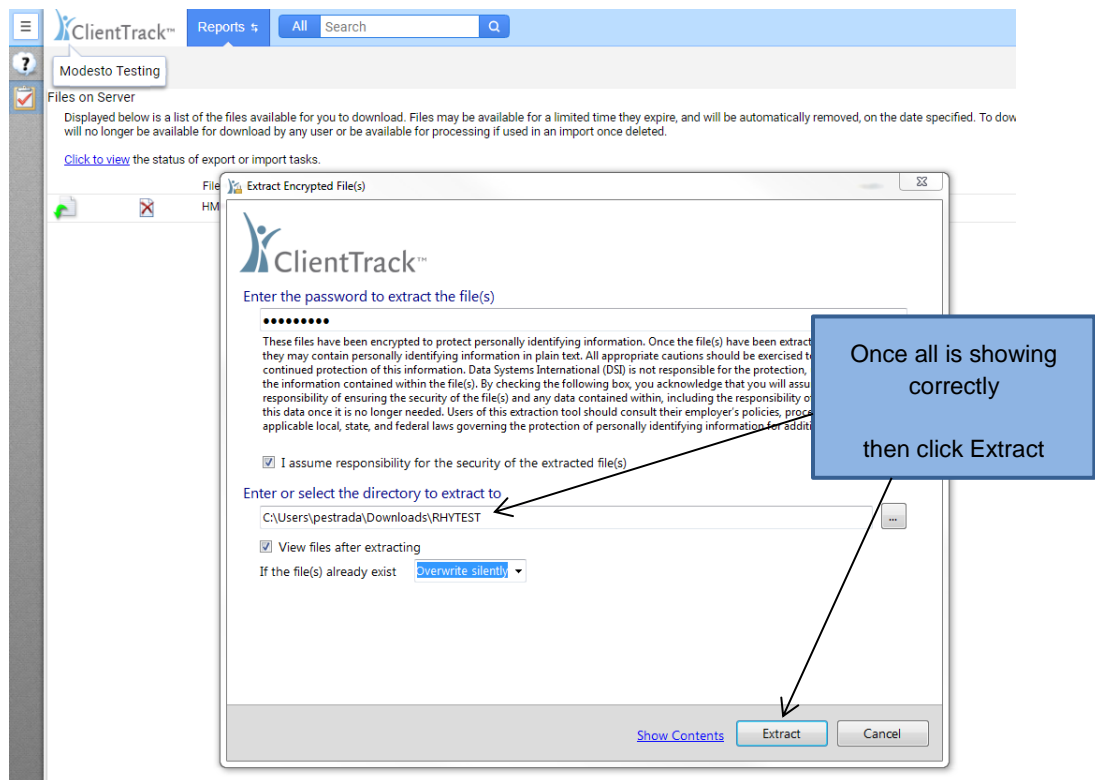
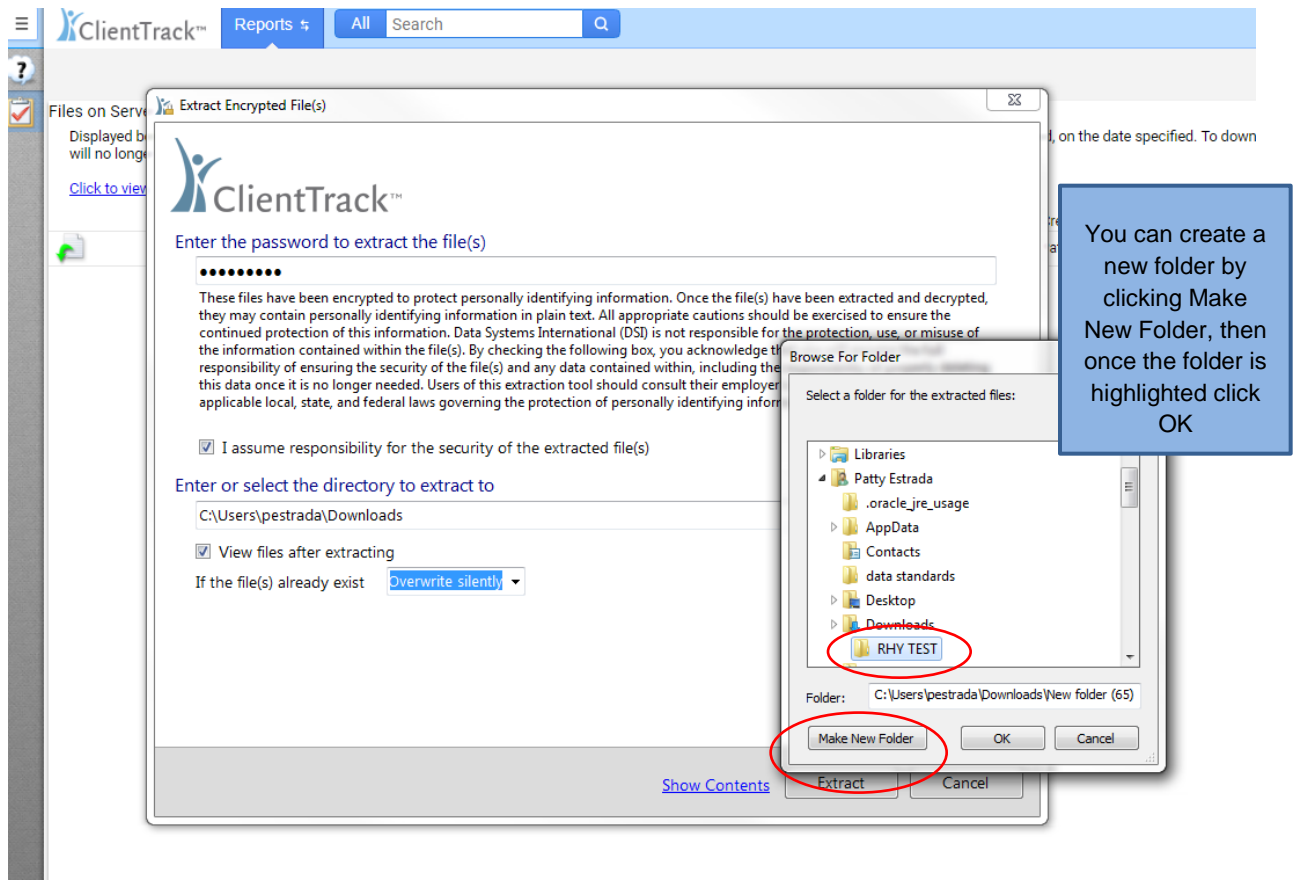


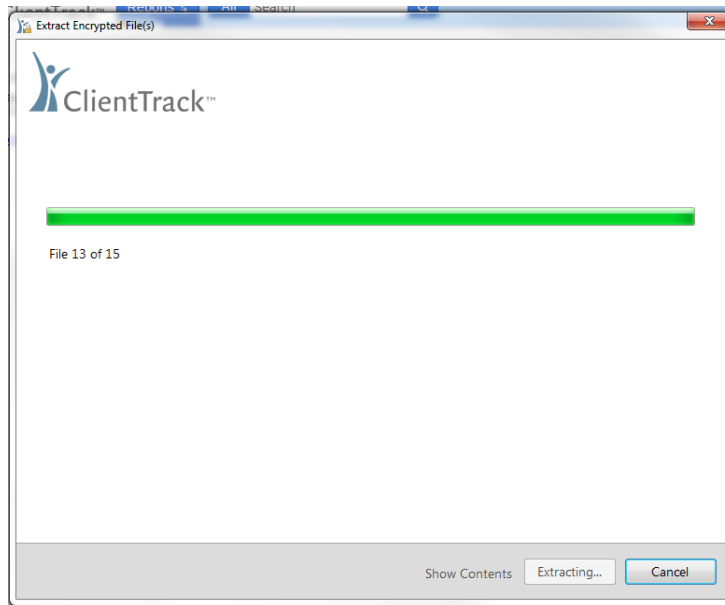
If you get a "Security Warning" click on Run



You will then be prompted to 1. Put in the Password you created, 2. Mark "I assume responsibility for the security of extracted files, and 3. Tell the system where you want the extracted file to go before you extract the file







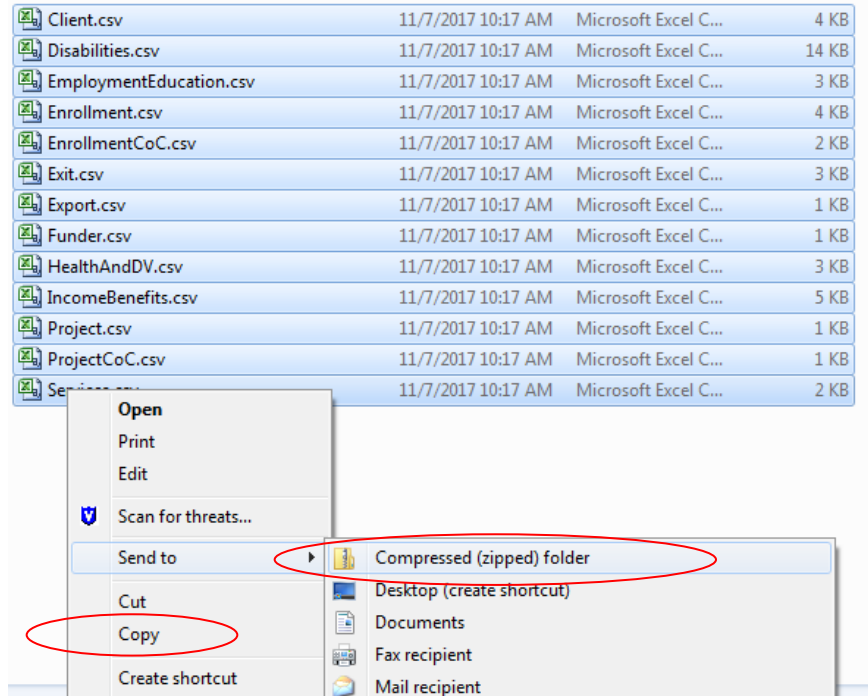
Files will be extracted

All 15 files will be visible

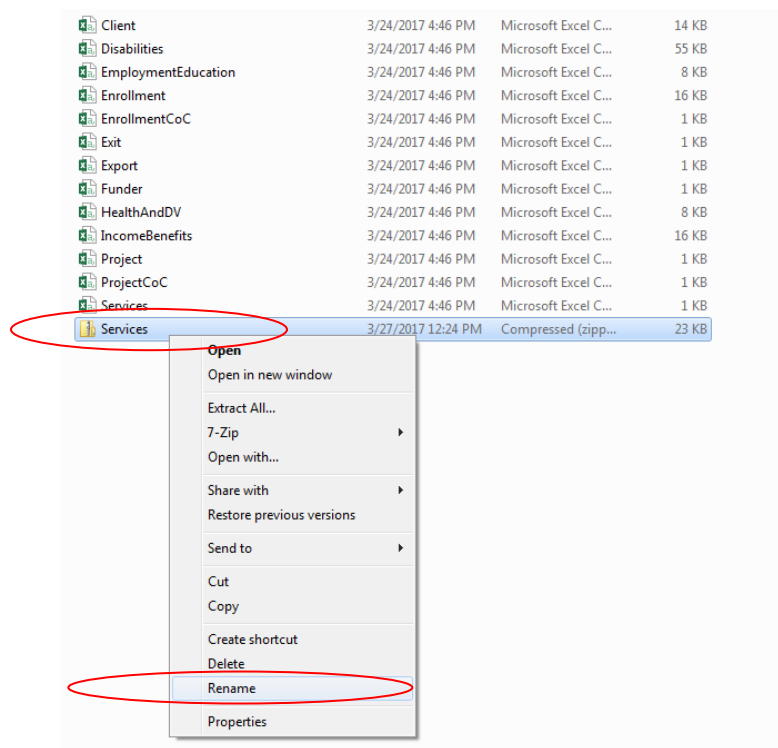
Name	Date modified	Type	Size
Client.csv	1/10/2020 3:16 PM	Microsoft Excel C...	22 KB
CurrentLivingSituation.csv	1/10/2020 3:16 PM	Microsoft Excel C...	1 KB
Disabilities.csv	1/10/2020 3:16 PM	Microsoft Excel C...	47 KB
EmploymentEducation.csv	1/10/2020 3:16 PM	Microsoft Excel C...	8 KB
Enrollment.csv	1/10/2020 3:16 PM	Microsoft Excel C...	15 KB
EnrollmentCoC.csv	1/10/2020 3:16 PM	Microsoft Excel C...	9 KB
Exit.csv	1/10/2020 3:16 PM	Microsoft Excel C...	4 KB
Export.csv	1/10/2020 3:16 PM	Microsoft Excel C...	1 KB
Funder.csv	1/10/2020 3:16 PM	Microsoft Excel C...	1 KB
HealthAndDV.csv	1/10/2020 3:16 PM	Microsoft Excel C...	8 KB
IncomeBenefits.csv	1/10/2020 3:16 PM	Microsoft Excel C...	19 KB
Project.csv	1/10/2020 3:16 PM	Microsoft Excel C...	1 KB
ProjectCoC.csv	1/10/2020 3:16 PM	Microsoft Excel C...	1 KB
Services.csv	1/10/2020 3:16 PM	Microsoft Excel C...	2 KB
User.csv	1/10/2020 3:16 PM	Microsoft Excel C...	4 KB

To create a zipped file:

- #1.** Highlight all of the files by holding your CTRL key and click on each of the files
- #2.** Make sure to move your arrow down to include all of them
- #3.** Right click on mouse to send to Compressed (zipped) folder

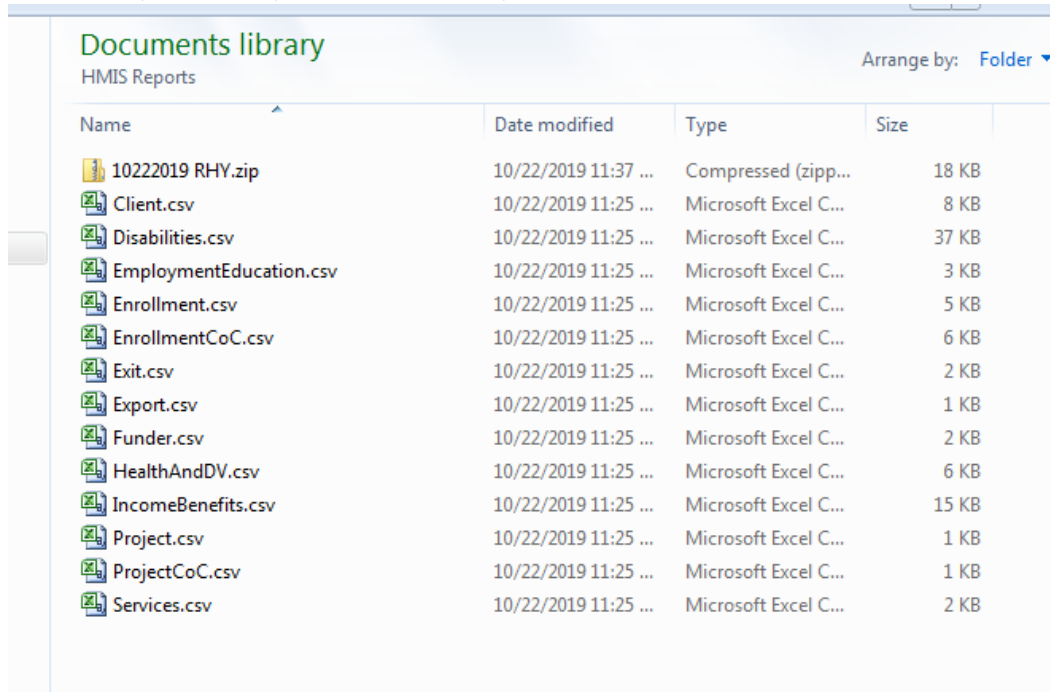


Your file will show zipped by you will have to rename it by 1. Highlighting the file and 2. Right-clicking and selecting Rename

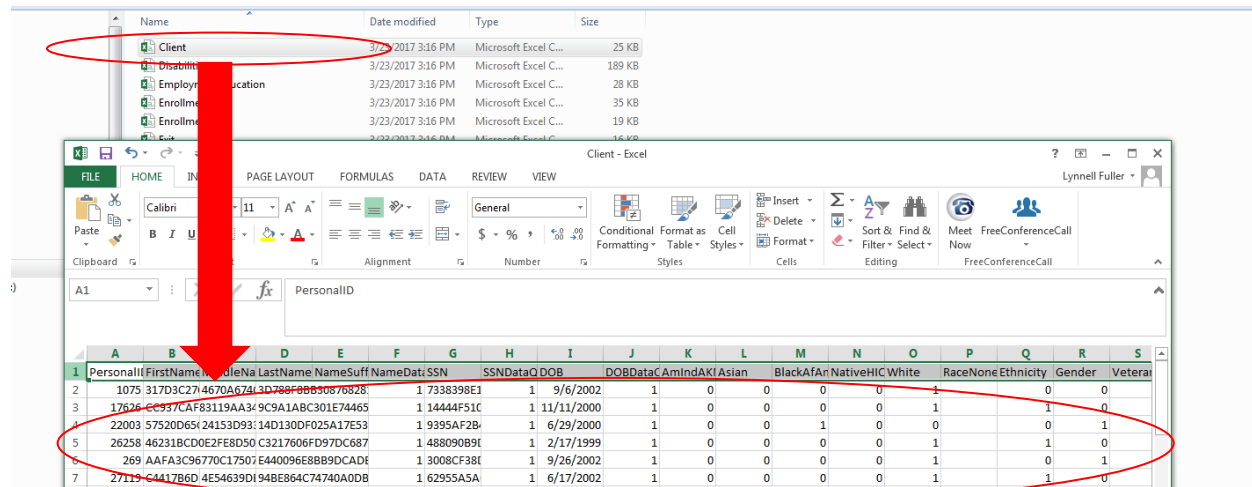


Once file is zipped you can then email by going to you Documents Library to find the file and attach to email. **DO NOT OPEN ZIP FILE** as it will change the format and not upload correctly. To view the data, use the unzipped files.

**Note:** Once you rename your file it will move by Alphabetical Order\*



You can then open and view each file to verify for errors or missing data

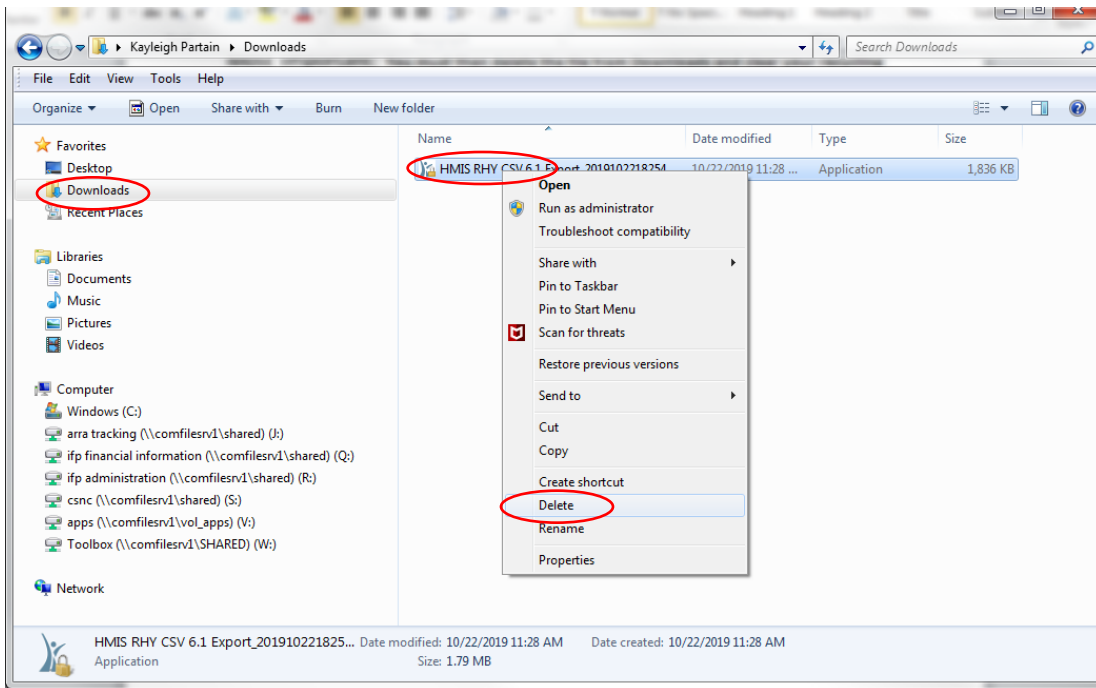


**REFER TO YOUR HMIS CSV FORMAT SPECIFICATIONS FOR DATA GUIDE**

<https://hudhdx.info/Resources/Vendors/HMIS%20CSV%20Specifications%20FY2020%20v1.1.pdf>

**MOST IMPORTANT:** You must then delete the file from Downloads and clear your Recycling Bin. You should never save or keep the file to your COMPUTER, the zip file will remain in your documents, under the file you created ONLY!!

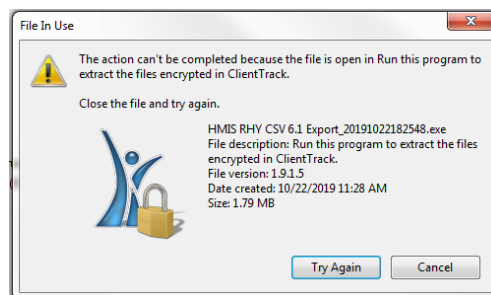
Bring up your Downloads. All of your downloaded files will appear, highlight the **RHY 6.1**, right click, and **Delete**



It will ask if you are sure you want to move this file to the Recycle Bin. Select **Yes**

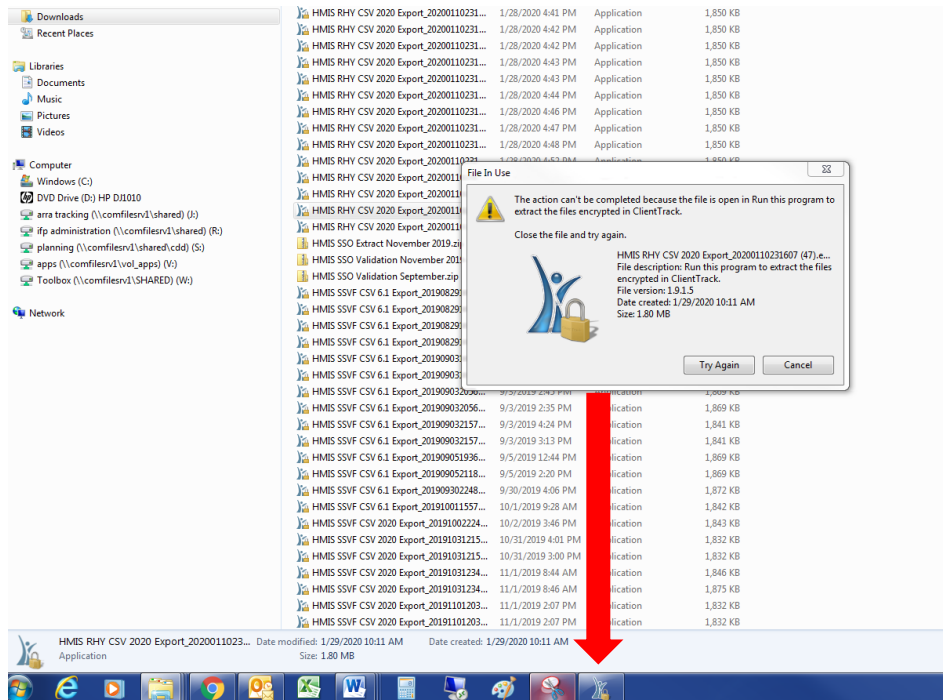


You may get an error that the action can't be completed because the file is open in Run.

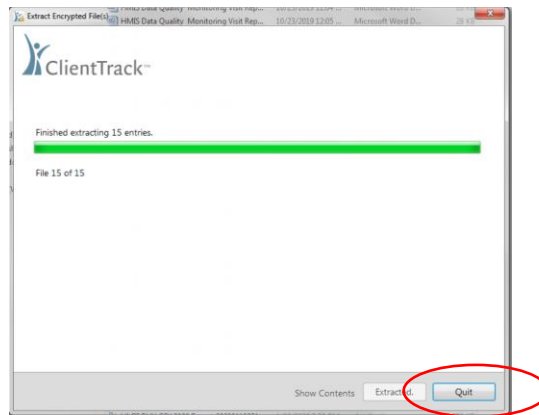


Click on the window tab at the bottom of your computer to bring up the locked file

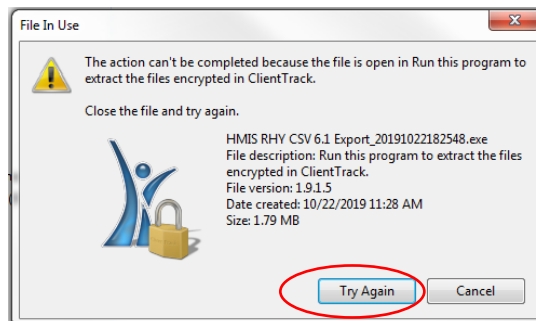




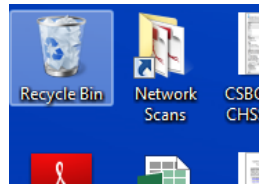
Once the Extract Encrypted Files screen is showing click on Quit



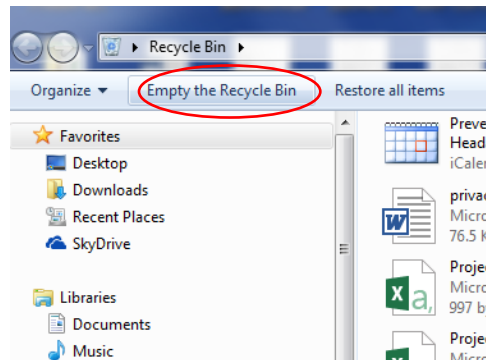
Then Try Again



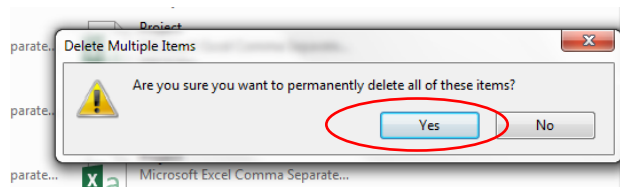
Go to your **Recycle Bin** on your computer desktop



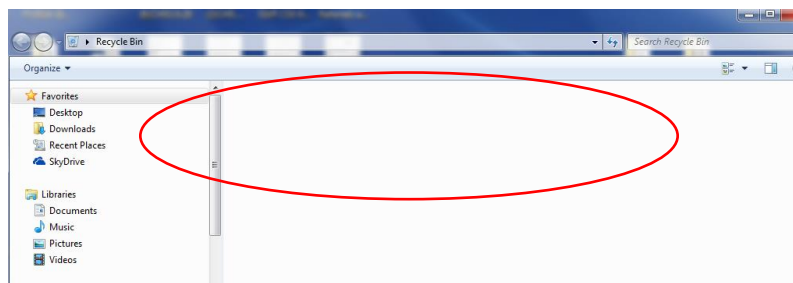
**Empty the Recycle Bin.**



You will be prompted: "Are you sure you want to permanently delete all files?"



Once the process is complete, your Recycle Bin should be empty.



You have now completed running the RHY Export –CSV 2020

**RHY-HMIS Data Collection & Reporting User Guide (v1 September 2020)**

[https://www.rhyttac.net/assets/docs/RHY-HMIS/2020.ABT/RHY-HMIS%20Data%20Collection%20User%20Guide\\_v1.pdf](https://www.rhyttac.net/assets/docs/RHY-HMIS/2020.ABT/RHY-HMIS%20Data%20Collection%20User%20Guide_v1.pdf)

**RHY Data Completeness – Data Quality Report User Guide**

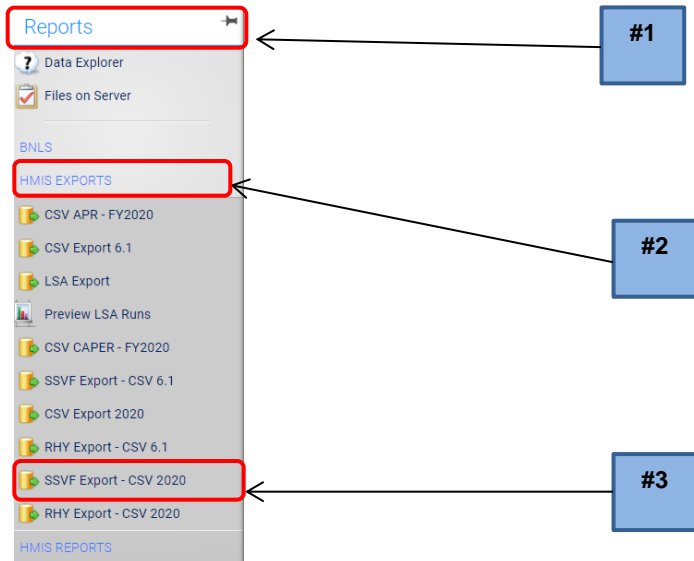
[https://www.rhyttac.net/assets/docs/RHY-HMIS/RHY-HMIS\\_Data\\_Completeness\\_Data\\_Quality\\_USER\\_MANUAL\\_10-2019\\_FINAL.pdf](https://www.rhyttac.net/assets/docs/RHY-HMIS/RHY-HMIS_Data_Completeness_Data_Quality_USER_MANUAL_10-2019_FINAL.pdf)

**RHY-HMIS Data Dashboard: Grantee Version, User Guide v1.1**

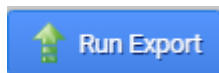
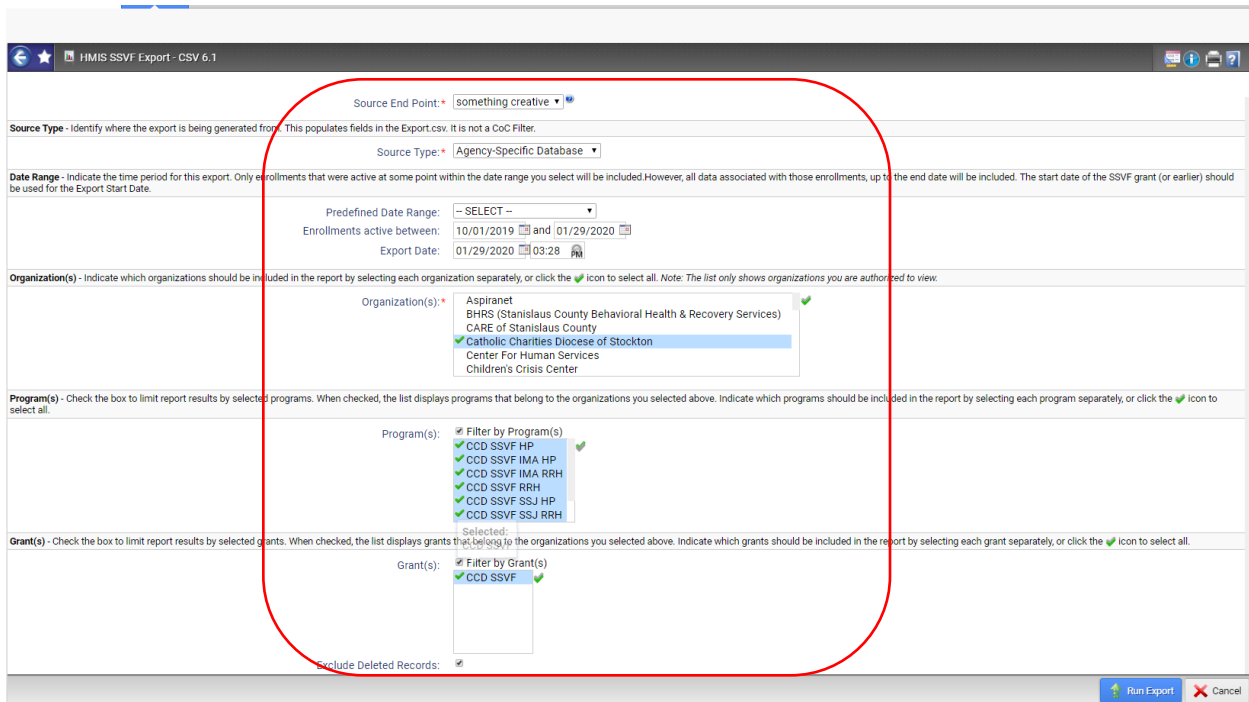
[https://www.rhyttac.net/assets/docs/RHY-HMIS/RHY-HMIS\\_Dashboard\\_User\\_Guide\\_82019\\_v1.1.pdf](https://www.rhyttac.net/assets/docs/RHY-HMIS/RHY-HMIS_Dashboard_User_Guide_82019_v1.1.pdf)

# SSVF CSV 2020

From the Reports Workspace>HMIS Exports



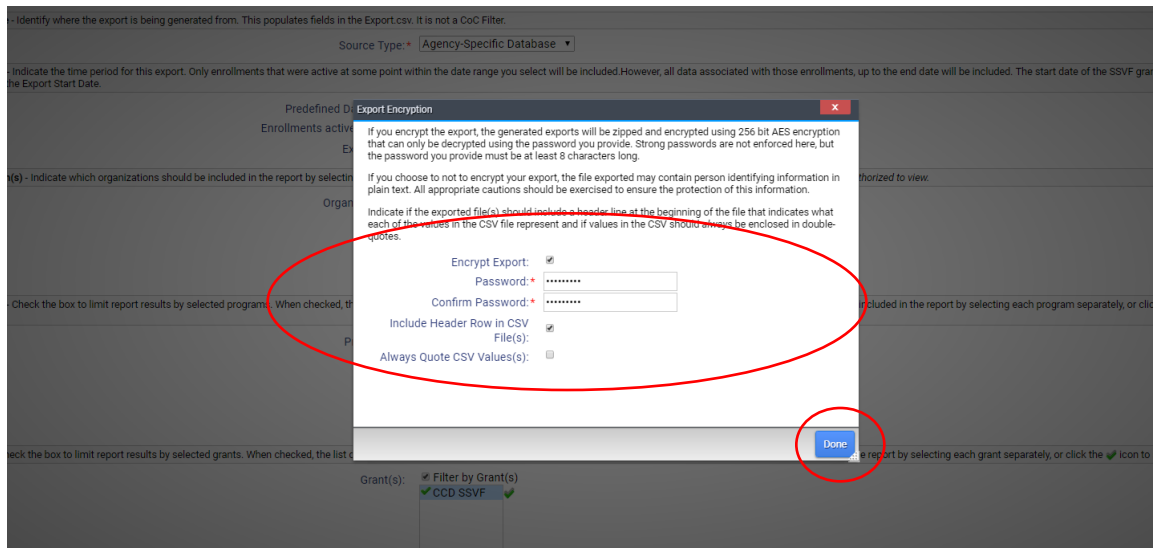
Add the **Source End Point**, **Source Type**, and **Enrollments active between dates** which are from the start of the grant 10/01/2017, which will default to the date that you are running the report, do not change the Export Dates as the date must be the same date that you upload the data per the VA, the Organization will be defaulted, you will click on the programs which need to be included in the report and the Grant, leave the Exclude Deleted Records checked.



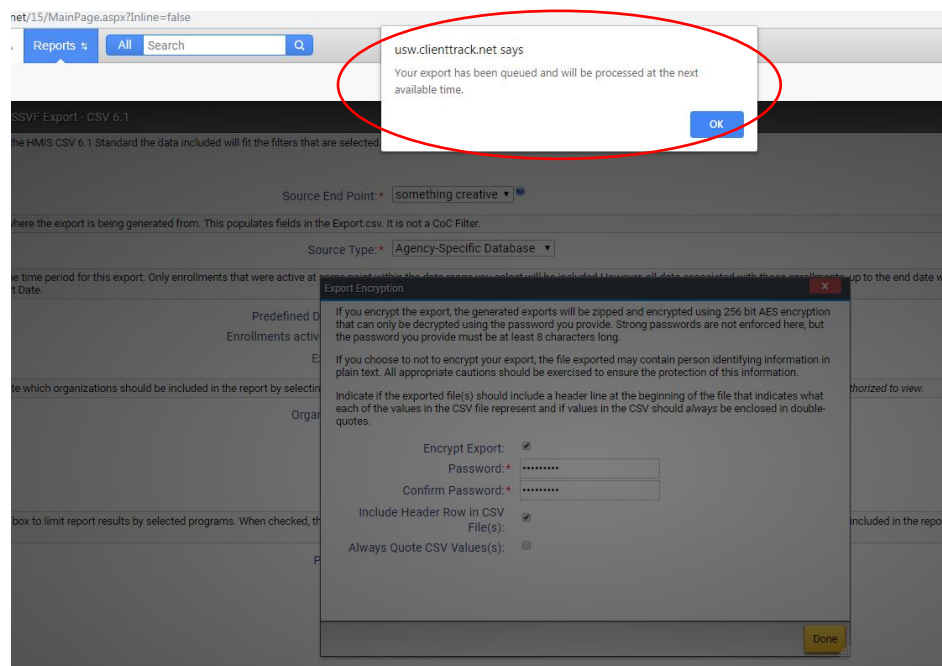
Then select Run Export

**\*Note:** It may take up to 20 minutes or longer to run each Export

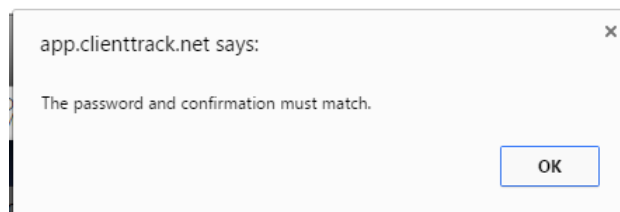
You will then have to create a Password and once confirmed, click **Done**

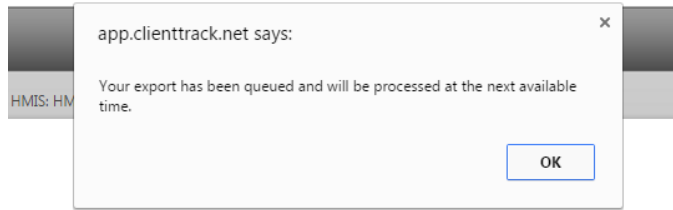


A window will appear giving you the status of your request.

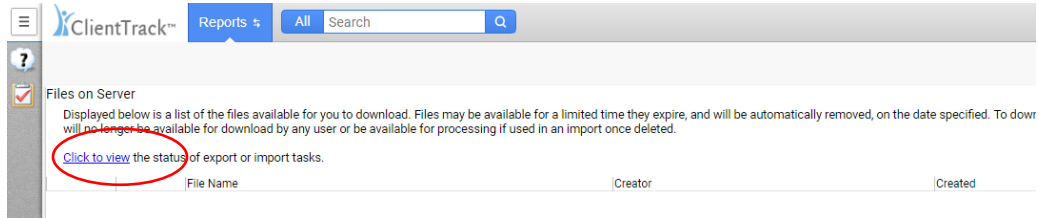


You will be prompted if there are issues or if your export has been queued.

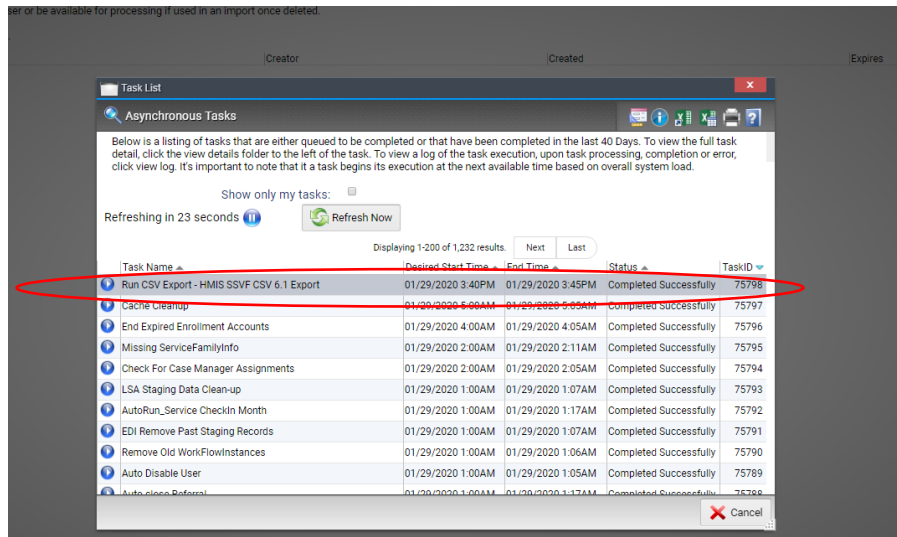




To verify your report is running click on the “Click to view”

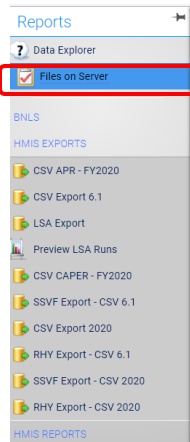


The report status will be visible.

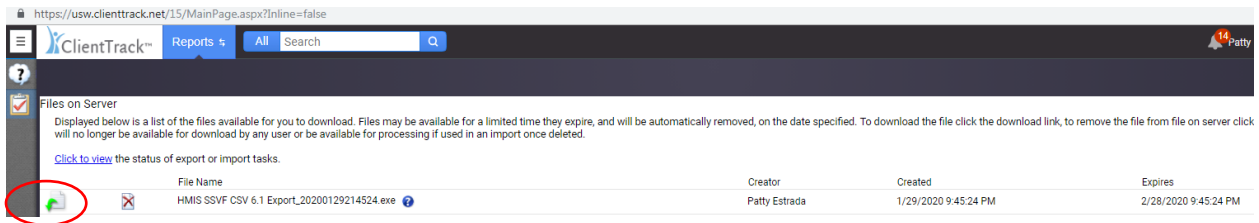


**Note:** While the report is running you can go to the Clients Workspace and continue doing other things in ClientTrack this will not stop or interrupt the report process.

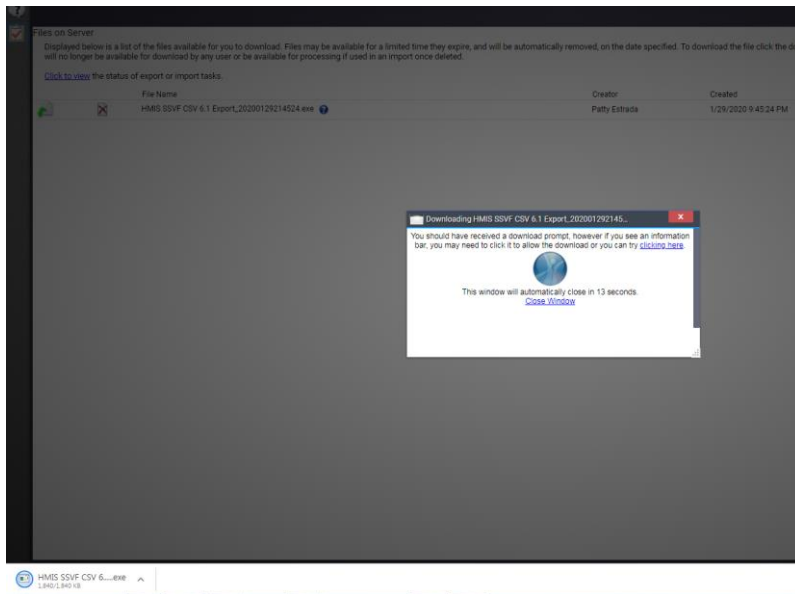
To see if your report is ready, you can find it by clicking **Reports** and **Files on Server**.



From there, you click on the **green download arrow**.



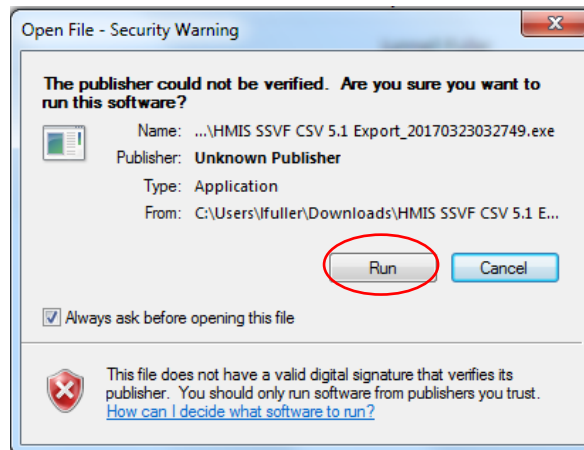
The report will download



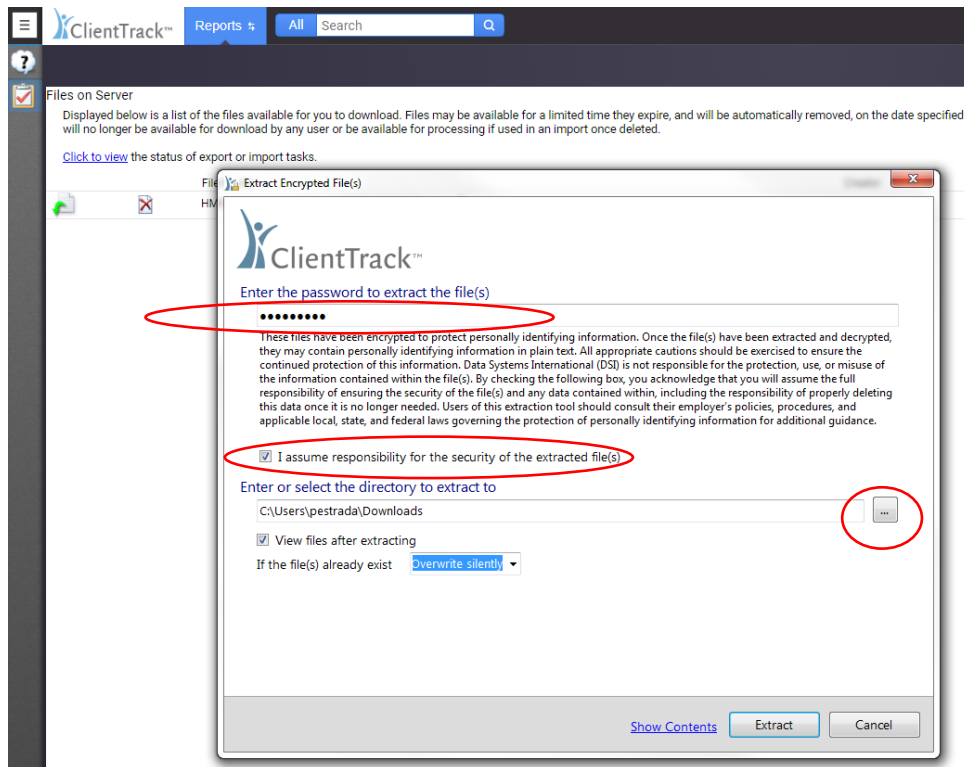
Click the **Down Arrow** and then **Open**



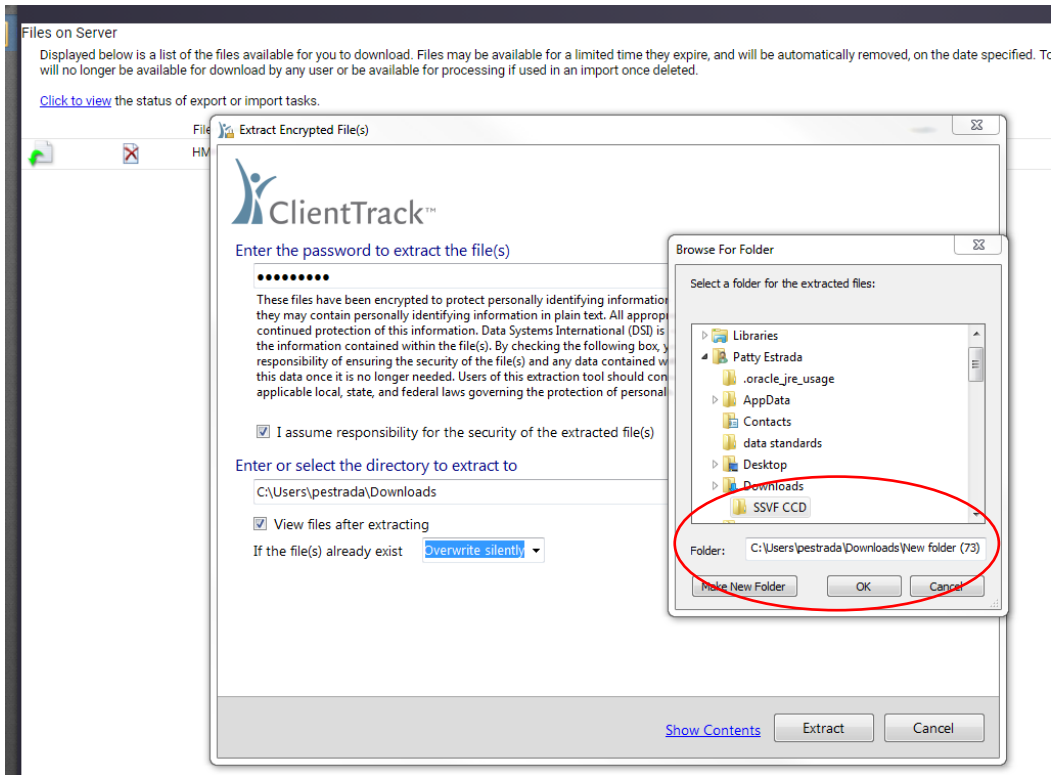
If you get a "Security Warning" click on Run



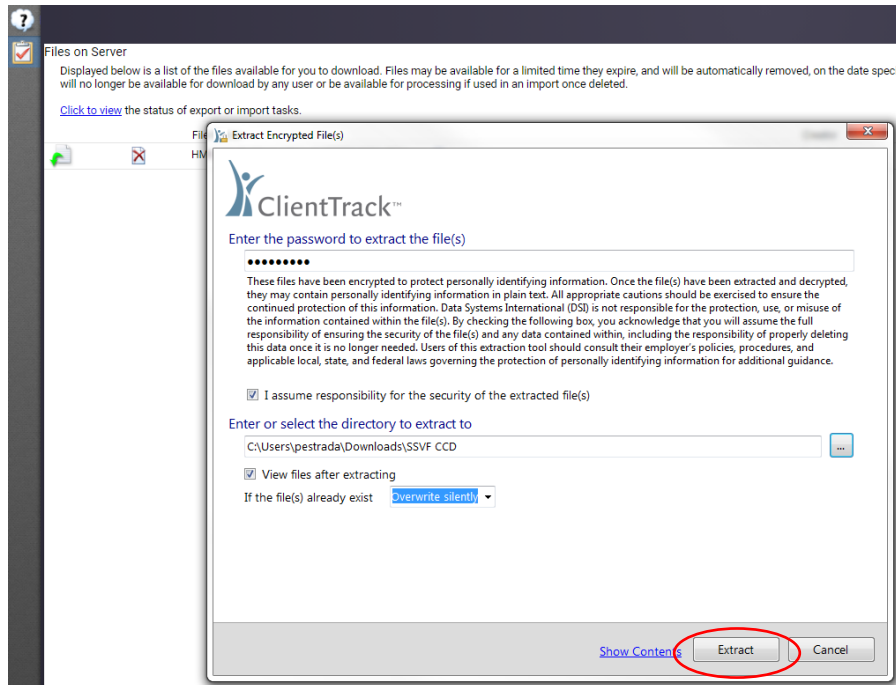
You will then enter your **Password**, **Assume responsibility for the security**, and report where/**which folder** you want to extract to.



Once you choose a file or Make New Folder, you then click OK

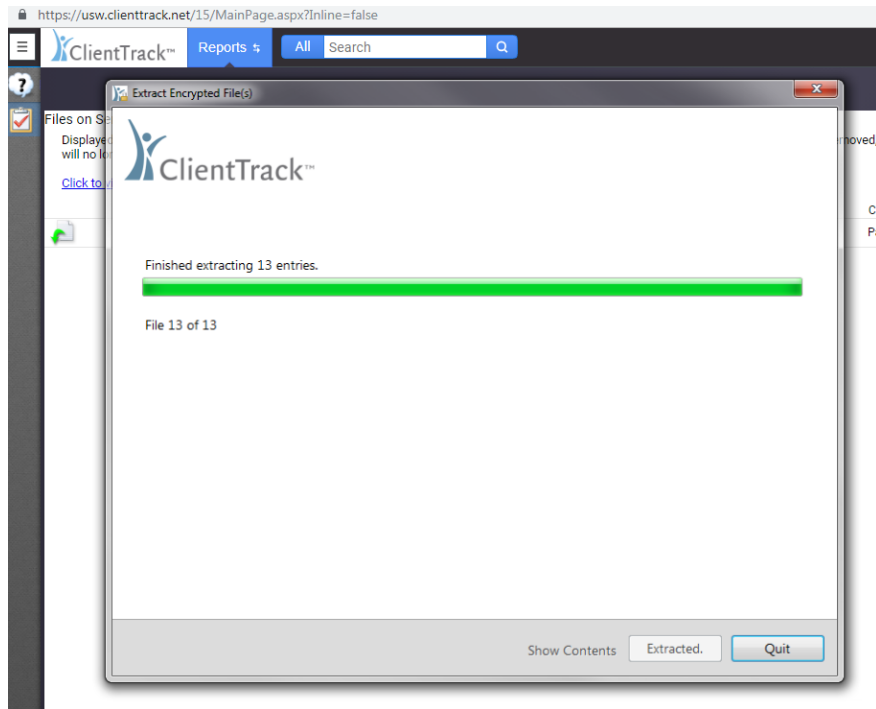


This screen will appear, click Extract

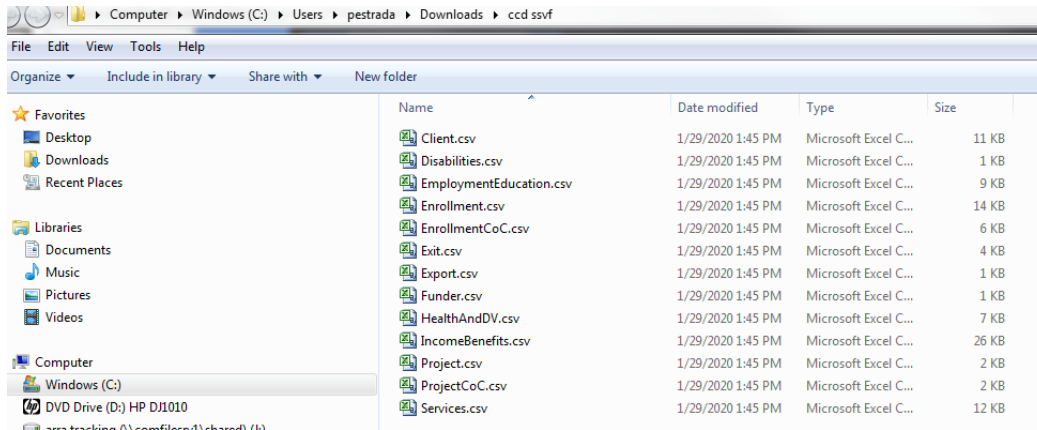

















The files will be extracted
















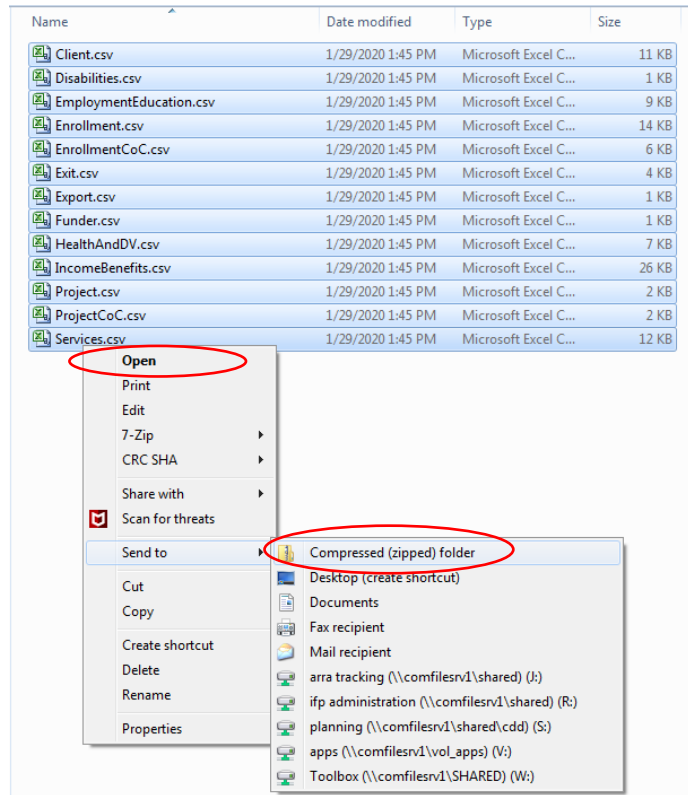
Once extracted, the 13 files will appear



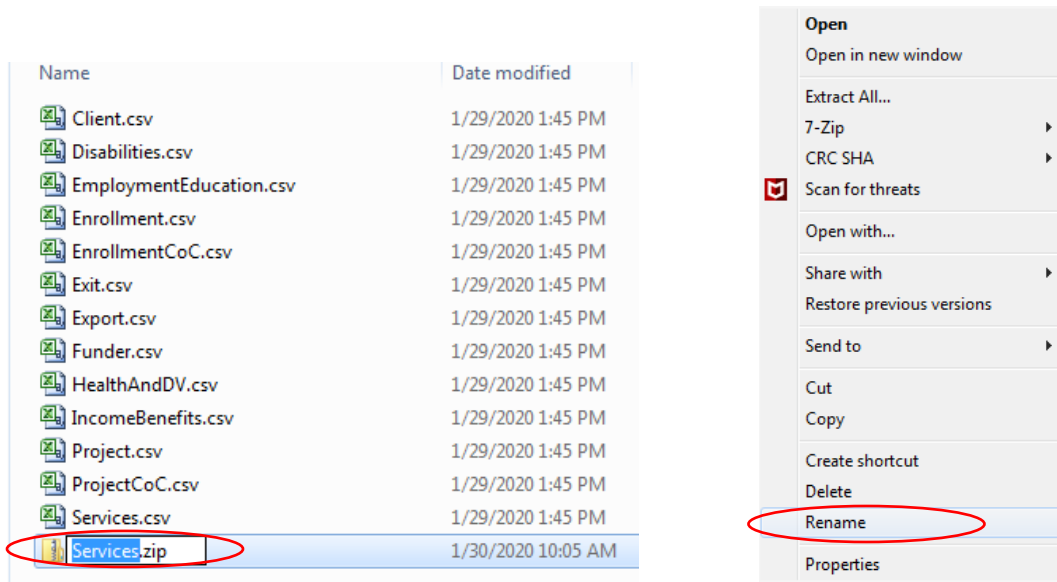
Name	Date modified	Type	Size
 Client.csv	1/29/2020 1:45 PM	Microsoft Excel C...	11 KB
 Disabilities.csv	1/29/2020 1:45 PM	Microsoft Excel C...	1 KB
 EmploymentEducation.csv	1/29/2020 1:45 PM	Microsoft Excel C...	9 KB
 Enrollment.csv	1/29/2020 1:45 PM	Microsoft Excel C...	14 KB
 EnrollmentCoC.csv	1/29/2020 1:45 PM	Microsoft Excel C...	6 KB
 Exit.csv	1/29/2020 1:45 PM	Microsoft Excel C...	4 KB
 Export.csv	1/29/2020 1:45 PM	Microsoft Excel C...	1 KB
 Funder.csv	1/29/2020 1:45 PM	Microsoft Excel C...	1 KB
 HealthAndDV.csv	1/29/2020 1:45 PM	Microsoft Excel C...	7 KB
 IncomeBenefits.csv	1/29/2020 1:45 PM	Microsoft Excel C...	26 KB
 Project.csv	1/29/2020 1:45 PM	Microsoft Excel C...	2 KB
 ProjectCoC.csv	1/29/2020 1:45 PM	Microsoft Excel C...	2 KB
 Services.csv	1/29/2020 1:45 PM	Microsoft Excel C...	12 KB

Do not open and view the files until you have created a zipped folder. It can change the format of the data causing upload issues. Highlight all of the files, right click, and create compressed (zipped) folder.

Name	Date modified	Type	Size
 Client.csv	1/29/2020 1:45 PM	Microsoft Excel C...	11 KB
 Disabilities.csv	1/29/2020 1:45 PM	Microsoft Excel C...	1 KB
 EmploymentEducation.csv	1/29/2020 1:45 PM	Microsoft Excel C...	9 KB
 Enrollment.csv	1/29/2020 1:45 PM	Microsoft Excel C...	14 KB
 EnrollmentCoC.csv	1/29/2020 1:45 PM	Microsoft Excel C...	6 KB
 Exit.csv	1/29/2020 1:45 PM	Microsoft Excel C...	4 KB
 Export.csv	1/29/2020 1:45 PM	Microsoft Excel C...	1 KB
 Funder.csv	1/29/2020 1:45 PM	Microsoft Excel C...	1 KB
 HealthAndDV.csv	1/29/2020 1:45 PM	Microsoft Excel C...	7 KB
 IncomeBenefits.csv	1/29/2020 1:45 PM	Microsoft Excel C...	26 KB
 Project.csv	1/29/2020 1:45 PM	Microsoft Excel C...	2 KB
 ProjectCoC.csv	1/29/2020 1:45 PM	Microsoft Excel C...	2 KB
 Services.csv	1/29/2020 1:45 PM	Microsoft Excel C...	12 KB



Don't forget to rename the zipped file by right clicking and hit Rename



Once you rename the file, it will move it into alphabetical order

Name	Date modified	Type	Size
Catholic Charities.zip	1/30/2020 10:05 AM	Compressed (zipp...	22 KB
Client.csv	1/29/2020 1:45 PM	Microsoft Excel C...	11 KB
Disabilities.csv	1/29/2020 1:45 PM	Microsoft Excel C...	1 KB
EmploymentEducation.csv	1/29/2020 1:45 PM	Microsoft Excel C...	9 KB
Enrollment.csv	1/29/2020 1:45 PM	Microsoft Excel C...	
EnrollmentCoC.csv	1/29/2020 1:45 PM	Microsoft Excel C...	
Exit.csv	1/29/2020 1:45 PM	Microsoft Excel C...	
Export.csv	1/29/2020 1:45 PM	Microsoft Excel C...	
Funder.csv	1/29/2020 1:45 PM	Microsoft Excel C...	1 KB
HealthAndDV.csv	1/29/2020 1:45 PM	Microsoft Excel C...	7 KB
IncomeBenefits.csv	1/29/2020 1:45 PM	Microsoft Excel C...	26 KB
Project.csv	1/29/2020 1:45 PM	Microsoft Excel C...	2 KB
ProjectCoC.csv	1/29/2020 1:45 PM	Microsoft Excel C...	2 KB
Services.csv	1/29/2020 1:45 PM	Microsoft Excel C...	12 KB

You can then open and review files for errors

REFER TO YOUR HMIS CSV FORMAT SPECIFICATIONS FOR DATA GUIDE

### FY2021 SSVF Monthly Report Guide v1.0

[https://www.va.gov/HOMELESS/ssvf/docs/SSVF\\_Monthly\\_Report\\_Guide\\_FY21.pdf](https://www.va.gov/HOMELESS/ssvf/docs/SSVF_Monthly_Report_Guide_FY21.pdf)

### VA Programs HMIS Manual 2020

<https://files.hudexchange.info/resources/documents/VA-Programs-HMIS-Manual.pdf>

Once Data is verified for accuracy and errors, you must then Upload Data into the VA's HMIS Repository

[www.hmisrepository.va.gov/index.php](http://www.hmisrepository.va.gov/index.php)

The screenshot shows the homepage of the VA HMIS Repository. At the top, it features the Department of Veterans Affairs logo and navigation links. The main heading reads "Welcome to the HMIS Repository and the Veteran Status Query and Response Exchange System (SQUARES)". Below this, a list of primary functions is provided: processing uploads, verifying data sets, combining data sets, and enabling search. A "Terms and Conditions of Use" pop-up window is open, detailing the secure nature of the site and the information required for a query (First Name, Middle Name, Last Name, Social Security Number, Date of Birth, Gender, and Zip Code). It also includes a section for user assurances and a login form with fields for Username and Password, and a "Login" button. At the bottom, there are links for "Register a new SQUARES account", "Register a new Repository account", and "I forgot my password".

1. Data Protection and System Security: VA will protect PII on the VRSS in accordance with all applicable federal laws and regulations, VA policies and procedures, and National Institute of Standards and Technology (NIST) requirements and guidelines, including, but not limited to, the Privacy Act (5 U.S.C. § 552a), the Federal Information Security Management Act of 2002 (FISMA, 44 U.S.C. §§ 3541-49), 38 U.S.C. § 5701, and VA Directive and Handbook 6500.
2. Breach Notification. VA complies with federal statutes and regulations in reporting data breach and loss of PII, in particular 38 U.S.C. §§ 5721-27.
3. Administrative Safeguards. VA will restrict access to the data transmitted to it via this Web site to only those authorized employees and officials who need it to perform their official duties in connection with the uses of the information described above.
4. Limited Use. VA will use data transmitted to it via this Web site to identify individuals for whom it has a record of military service, and for no other purpose. VA will not use the information in any determination of benefits nor will the PII be added to a Privacy Act system of records.
5. Disposition of Data. VA may retain data pertaining to your use of the HMIS and SQUARES applications for lawful purposes, such as to perform tests and to conduct and facilitate audits of the use of the HMIS and SQUARES applications.
6. Data disposal. For cases where a match was found, the system shall only store an identifier linking the Veteran back to a record in the database used for the match. The system shall immediately purge all personally identifying information for Veterans and non-Veterans and any other data included in the query and not included in the audit trail after the response is provided. VA will dispose of PII and data pertaining to your use of the SQUARES application in accordance with NARA approved records control schedules.

I have read and accept the Terms and Conditions of Use

Username

Password

-- Login --

[Register a new SQUARES account](#) | [Register a new Repository account](#) | [I forgot my password](#)

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DEPARTMENT OF VETERANS AFFAIRS

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### HMIS Repository / SQUARES Account Menu

- User Options**
- [SQUARES](#)
  - [My Account](#)
  - [Activity History](#)
  - [Support](#)
  - [Logout](#)

**Important Upload Information**

- **The deadline for an on-time upload is the THIRD BUSINESS DAY** of each month.
- **The Repository will remain open through the NINTH calendar day** of each month for updates and additions.
- **DATA QUALITY REPORTING is currently unavailable. We apologize for the inconvenience -- it will resume as soon as possible.**
- All uploads must be in the HMIS CSV 5.1 format.
- You need a separate Repository program for each export you run in order to generate complete data for your grant -- contact [ssvfhmis@abtassoc.com](mailto:ssvfhmis@abtassoc.com) to add or remove Repository programs.
- The start date of an export for an FY 2017 grant should be 10/1/2016.
- The end date of any export should be the date the export is created. The end date should NOT be the last day of the previous month unless you generated the export on that date.
- Compress (zip/rar) your CSV files prior to uploading. Compress only the CSV files -- if you compress the folder the files are in, the Repository will not be able to locate those files.
- Any time you upload to the Repository, you are replacing all of the data for your program / deleting anything that was uploaded before.
- Contact [ssvfhmis@abtassoc.com](mailto:ssvfhmis@abtassoc.com) if you need technical assistance.

**Grant/Programs:**

- WestCare California Inc. (12-CA-011) -Stanislaus
- Catholic Charities of the Diocese of Stockton (14-CA-177)

**CoC:**

## Activity History

[Repository Home](#)

Select program: Catholic Charities of the Diocese of Stockton (14-CA-177) ▼

Date / Time (EST)	Username	Status
3/7/16 4:46:40 PM	lfullerm (Catholic Charities of the Diocese of Stockton (14-CA-177))	Upload successful
3/7/16 4:46:14 PM	lfullerm (Catholic Charities of the Diocese of Stockton (14-CA-177))	Validation successful
3/1/16 8:24:10 PM	lfullerm (Catholic Charities of the Diocese of Stockton (14-CA-177))	Upload successful
3/1/16 8:23:39 PM	lfullerm (Catholic Charities of the Diocese of Stockton (14-CA-177))	Validation successful

## HMIS Repository Account Menu

### User Options

- [Upload FY15 Data](#)
- [Upload CSV](#)
- [Upload XML](#)
- [My Account](#)
- [Activity History](#)
- [Support](#)
- [Logout](#)

### Important Information

- Only data in the HMIS CSV 4.0 format will be accepted
- Use the Upload FY15 Data form -- the first option on the left -- to upload data
- You need a separate Repository program for each export you run in order to generate complete data for your grant -- contact [ssvfhmis@abtassoc.com](mailto:ssvfhmis@abtassoc.com) to add or remove Repository programs
- The start date of an export for an FY15 grant should be 10/1/2014 (or earlier)
- The end date of any export should be the date the export is created. The end date should NOT be the last day of the previous month unless you generated the export on that date.
- Zip your CSV files prior to uploading
- Zip only the CSV files -- if you zip the folder the files are in, the Repository will not be able to find the files.
- Any time you upload to the Repository, you are replacing all of the data for your program / deleting anything that was uploaded before
- Contact [ssvfhmis@abtassoc.com](mailto:ssvfhmis@abtassoc.com) if you need technical assistance.

## Validation

Generally speaking, ClientTrack's approach to validation is focused on data collection. Forms used to collect data should prevent invalid data. Data Collection validation is more accurate and efficient than validation at export because it prevents errors rather than trying to fix after they've been entered into the system.

Click on **Choose File** and attach the file you are going to upload, click on **Validate Only**, then **Submit**

### CSV Data Upload Form (V4.0)

1. Program:

2. Zip file:  No file chosen (zip file)

3. Options:  Validate and upload  
 Validate Only

It will then show you if there are any errors, etc. You can then click **Upload Data**



### Upload CSV FY15 Data

[CSV Upload FY15 Data](#) | [Repository Home](#)

#### Step 1. File Upload

Program name: Catholic Charities of the Diocese of Stockton (14-CA-177)  
User name: ifuller  
User email: ifuller@stancoha.org  
File name: CCDMarch1\_2016.zip  
File type: application/x-zip-compressed  
File size: 78,233,398,4375 Kb  
Processing Option: validate\_only

#### Step 2. Unzip

Unzip successful  
numFiles: 9  
Index 1: ProjectCoC.csv  
Index 2: Services.csv  
Index 3: Project.csv  
Index 4: EnrollmentCoC.csv  
Index 5: Client.csv  
Index 6: IncomeBenefits.csv  
Index 7: Exit.csv  
Index 8: Export.csv  
Index 9: Enrollment.csv

#### Step 3. Validate File

Export.csv [2 rows found in the file.]  
Project.csv [9 rows found in the file.]  
ProjectCoC.csv [9 rows found in the file.]  
Enrollment.csv [332 rows found in the file.]  
EnrollmentCoC.csv [263 rows found in the file.]  
Client.csv [321 rows found in the file.]  
Exit.csv [296 rows found in the file.]  
IncomeBenefits.csv [753 rows found in the file.]  
Services.csv [699 rows found in the file.]

#### [ Validation Result Summary ]

##### Data Quality Alerts

No issue found.

##### Validation Errors

No issue found.

##### File Errors

No issue found.

No issues found. Click the button below to process uploaded data files.

Processing Data Completed.

Index 1: ProjectCoC.csv [9 rows found in the file.]

It will then show you if the **Data Insert** was **Successful** and let you know that the data has been accepted.

- **Data Insert Successful.**  
Index 4: **EnrollmentCoC.csv** [263 rows found in the file.]  
- **Data Insert Successful.**  
Index 5: **Client.csv** [321 rows found in the file.]  
- **Data Insert Successful.**  
Index 6: **IncomeBenefits.csv** [753 rows found in the file.]  
- **Data Insert Successful.**  
Index 7: **Exit.csv** [296 rows found in the file.]  
- **Data Insert Successful.**  
Index 8: **Export.csv** [2 rows found in the file.]  
- **Data Insert Successful.**  
Index 9: **Enrollment.csv** [332 rows found in the file.]  
- **Data Insert Successful.**

**Step 4. DB Insert**

\* CCDMarch1.2016.zip with file id ID 39023 has been inserted successfully to the database.  
\* Program Status has been updated as completed.

**[ Data Summary ]**

Grant year start date : 2015-10-01  
Grant year end date : 2016-09-29  
Participants served : 111  
RRH participants served : 107  
HP participants served : 4  
Veterans served : 67

The upload was successful and the data has been accepted.

**YOU HAVE COMPLETED YOUR UPLOAD!**

## Annual Performance Report (APR)

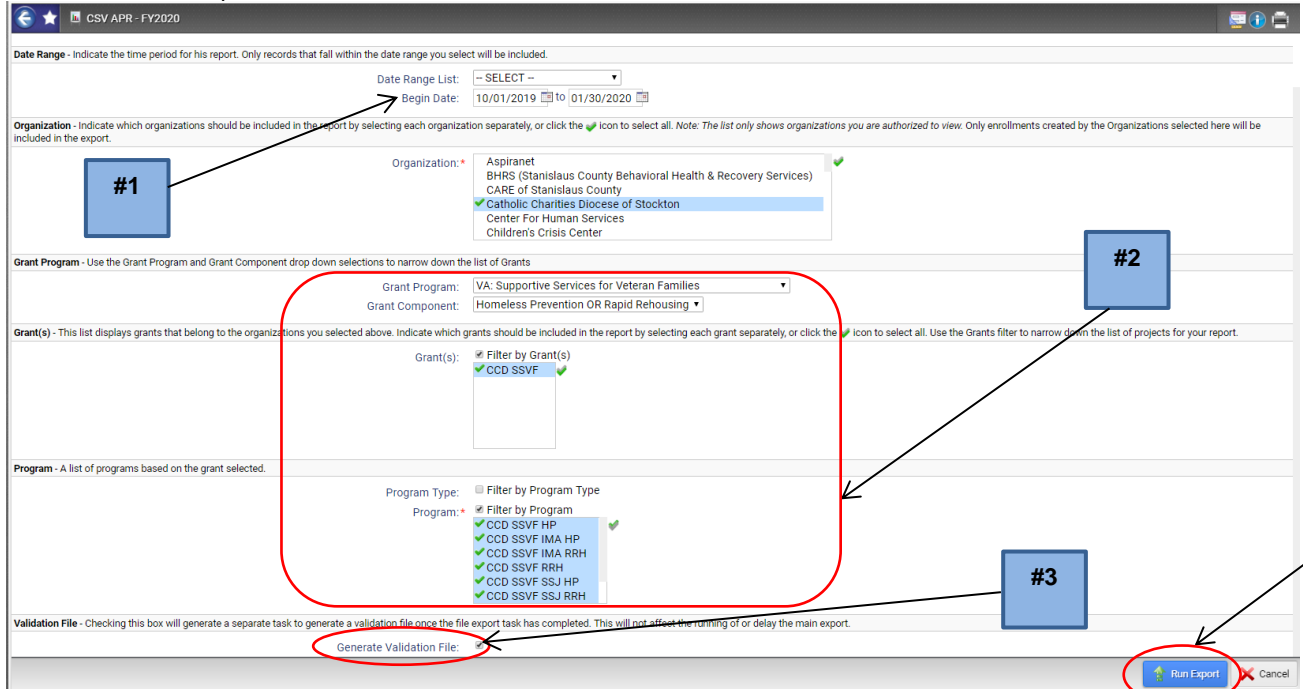
The 2020 CoC APR export is designed to meet HUD reporting requirements with the SAGE Repository. It is an export consisting of 65 separate CSV files. Similar to our other exports, they will be downloaded as a self-extracting encrypted file. Once the data is extracted and decrypted, you will need to zip up the files to submit to SAGE <https://www.sgaehmis.info/>

From the Reports Workspace> HMIS Exports>CSV APR – FY2020

The screenshot shows a vertical navigation menu with the following items: Reports, Data Explorer, Files on Server, BNLS, HMIS EXPORTS, CSV APR - FY2020, CSV Export 6.1, LSA Export, Preview LSA Runs, CSV CAPER - FY2020, SSVF Export - CSV 6.1, CSV Export 2020, RHY Export - CSV 6.1, SSVF Export - CSV 2020, RHY Export - CSV 2020, and HMIS REPORTS. Three blue boxes with arrows point to specific items: #1 points to 'Reports', #2 points to 'HMIS EXPORTS', and #3 points to 'CSV APR - FY2020'. The 'Reports' and 'HMIS EXPORTS' items are highlighted with red boxes.

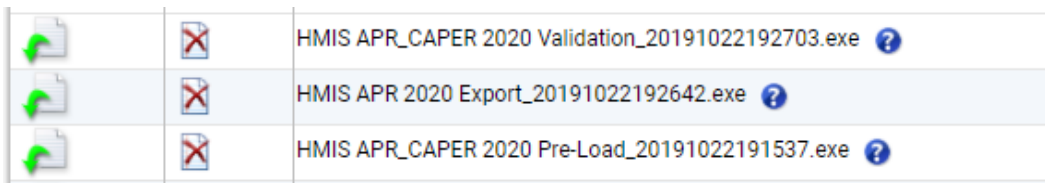


- #1. Select Begin Date Range
- #2. Choose Grant Program, Grant Component, Grants, and Program
- #3. Check Generate Validation File
- #4. Run Export



The report launch form has the **Date Range**, **Organization**, **Grant**, and **Program** filter similar to other HMIS Compliance Reports. To generate a validation file similar to the output of the APR, ESG, and DQ Detail Export, check the box next to **Generate Validation File**

The 2020 CoC APR will generate two files. If the **Generate Validation File** is checked, a third is created.



The **APR Validation File** is the export similar to the APR, ESG, and DQ Detail Export. (Example below) The HMIS APR 6.1 Export file contains the 65 questions of the report. You must download and decrypt this file for your APR.

	APR_2020_Detail.csv	10/22/2019 12:26 ...	Microsoft Excel C...	21 KB
	APR_2020_DQ_2_Detail.csv	10/22/2019 12:26 ...	Microsoft Excel C...	1 KB
	APR_2020_DQ_3_Detail.csv	10/22/2019 12:26 ...	Microsoft Excel C...	1 KB
	APR_2020_DQ_4_Detail.csv	10/22/2019 12:26 ...	Microsoft Excel C...	1 KB
	APR_2020_DQ_5_Detail.csv	10/22/2019 12:26 ...	Microsoft Excel C...	1 KB
	APR_2020_DQ_6_Detail.csv	10/22/2019 12:26 ...	Microsoft Excel C...	1 KB
	APR_2020_DQ_7_Detail.csv	10/22/2019 12:26 ...	Microsoft Excel C...	1 KB
	APR_2020_Q13_Detail.csv	10/22/2019 12:26 ...	Microsoft Excel C...	10 KB
	APR_2020_Q14_Detail.csv	10/22/2019 12:27 ...	Microsoft Excel C...	2 KB
	APR_2020_Q19_Detail.csv	10/22/2019 12:27 ...	Microsoft Excel C...	3 KB
	APR_2020_Q21_Detail.csv	10/22/2019 12:27 ...	Microsoft Excel C...	15 KB

## Critical Data

The APR will look at the most recent project stay and associated data. Previous enrollments in the project, even those in the report date range are excluded from the report universe. Active clients in the most recent project stay are determined by the HMIS Reporting Glossary method. For projects other than Street Outreach, this will be based on the entry and exit dates of the clients. For Street Outreach projects, active clients must have a contact in the reporting range.

## Household Types

Numbers are reported throughout the APR by household type. Age and correct household composition is critical to accurately calculating household type. Clients who are not part of the same enrollment case (CaseID) will not be considered part of the household in the APR. Clients with unknown birthdates will likely cause the household to be counted as an unknown type. For Youth households, every case member must have a calculable age to ensure all requirements are met. The report uses the following instructions from the HMIS Reporting Glossary to calculate household type:

Household type	adults	children	unknown
a. Without children	> 0	0	0
b. With children and adults	> 0	> 0	n/a
c. With only children	0	> 0	0
d. Unknown household type	0	0	> 0
d. Unknown household type	0	> 0	> 0
d. Unknown household type	> 0	0	> 0

- ❖ **Veteran and Youth Household Identification:** Based on logic used among HMIS compliance reports and the Reporting Glossary, only adults can be positively identified as Veterans. Similarly, to identify a Youth household, all case members must meet specific age requirements. If any case members have an unknown date of birth, the household cannot be positively identified as a youth household of any kind.
- ❖ **Substance Abuse:** Substance abuse can consist of only alcohol abuse, only drug abuse, or both. If both drug and alcohol abuse is present, this counts as 2 conditions.
- ❖ **Income:** For a valid income assessment to be reported several criteria need to be met. The client must be an adult, the data collection stage must be correct, and the assessment dates must match Entry and Exit dates or fall within the valid date range for the client's annual assessment.
- ❖ **Annual Assessments:** Annual assessments are required for clients enrolled in the project 365 days or more. To be considered a valid annual assessment, the data collection type must be Annual and dated with the 30 day window (plus or minus) of the client's anniversary date.

## Data Validation

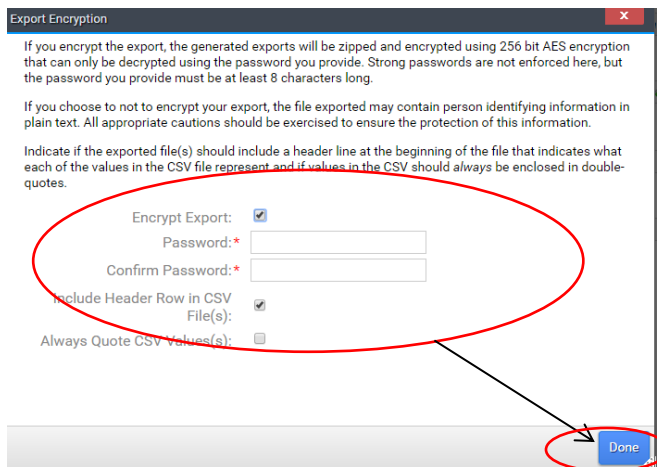
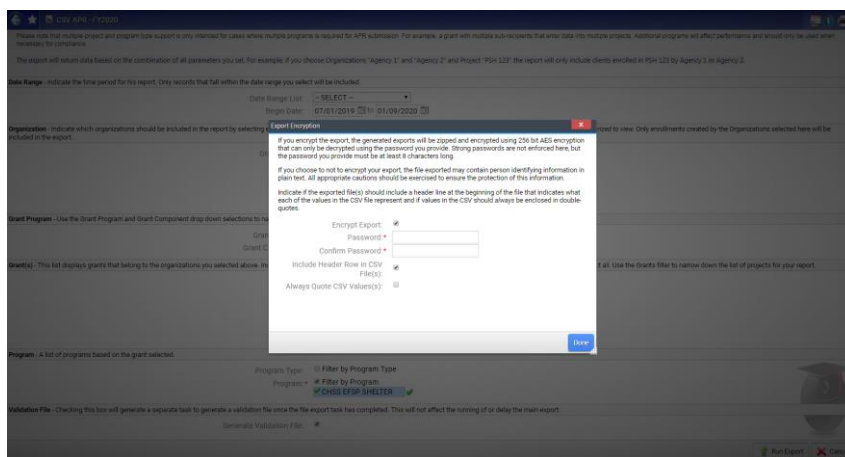
The CoC APR will report active clients in projects based on the HMIS Reporting Glossary methods. For projects other than Street Outreach projects, active clients must have a contact in the reporting range. The SAGE repository looks for consistent counts across the questions. Question validation between Q5a and other questions depends on the project type.

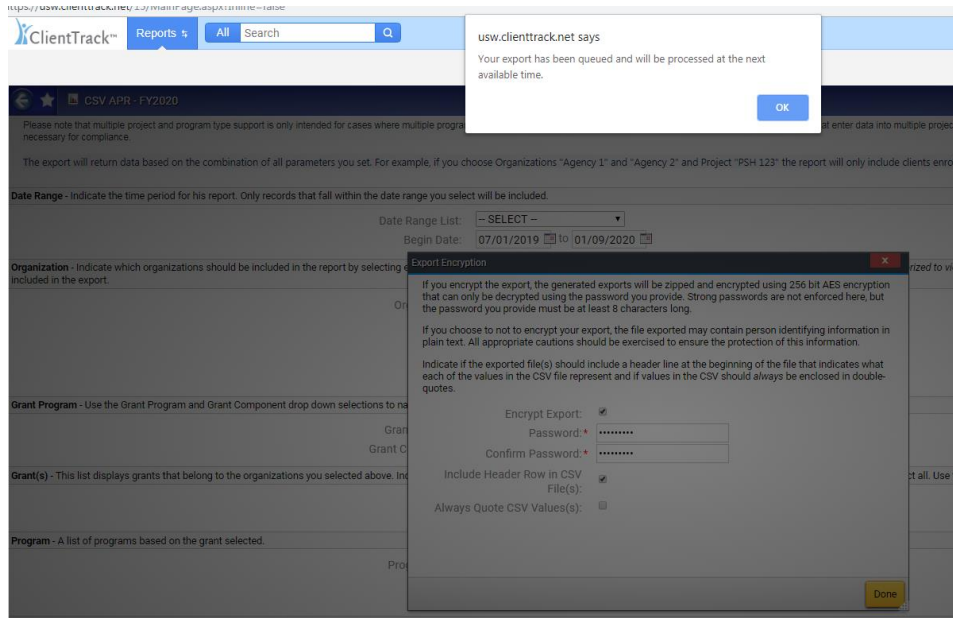
- ❖ **Projects other than Street Outreach:** For project types other than Street Outreach, the report will check the number (or sum of several numbers) and look for an equal or lesser number in

questions. For example, income questions should equal the number of adult stayers or leavers. In Q23, the total in any one should be less than or equal to the number of leavers.

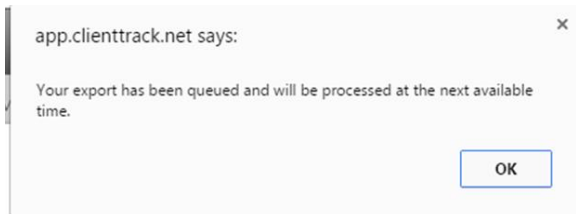
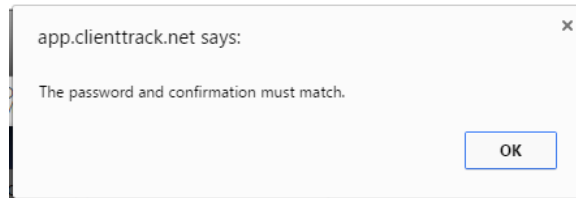
- ❖ **Street Outreach Projects:** Because the data quality questions require a date of engagement in order to be counted, the number of clients shown in Q5a will tend to not equal the number of clients (adults, leavers, etc.) in corresponding questions. The validation rule will check that the count of clients in questions is greater than or equal to the numbers shown in Q5a.
- ❖ **Accessing Client Level Data:** To access client level data, either the **Generate Validation File** option should be checked on the report launch form or you can use the APR, ESG, and DQ Detail Export. Either option will produce a separate export file.

You will have to create a Password, keep the **Encrypt Export** and **Include Header Row in the CSV Files** boxes checked, you have the option to check Always Quote CSV Values but this is not necessary, see descriptions below. Then click Done.

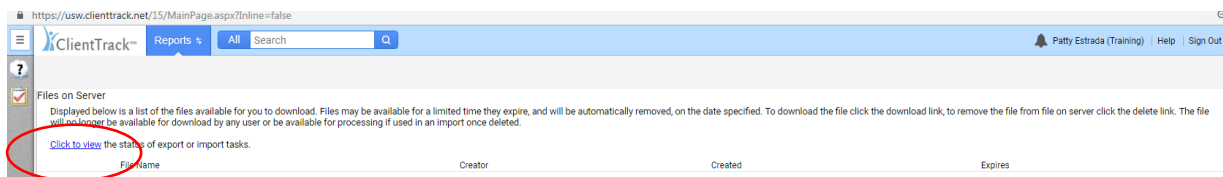




You will be prompted if there are issues or if your export has been queued. **\*Note:** It can take up to 20 minutes or longer to run each Export.

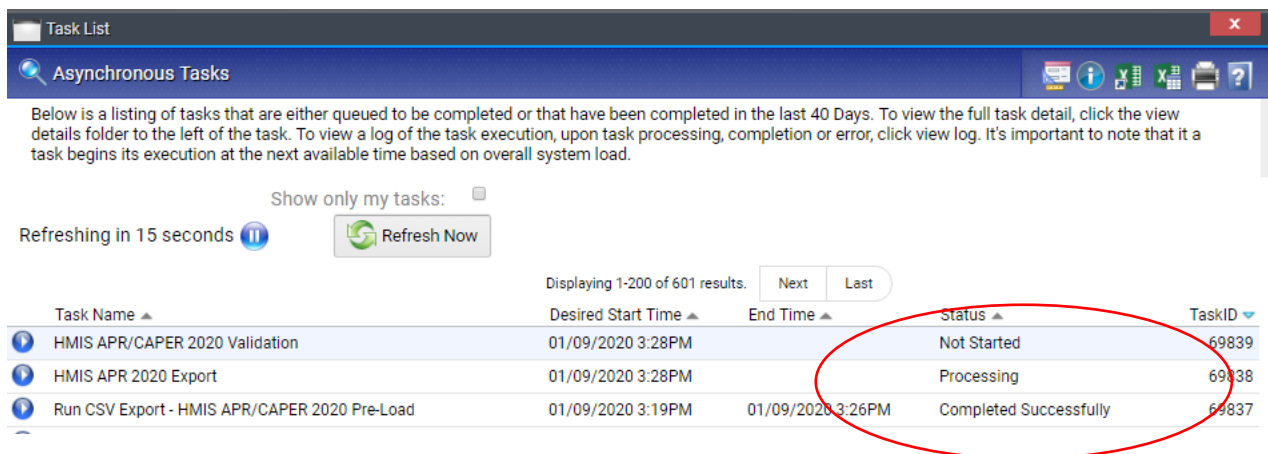
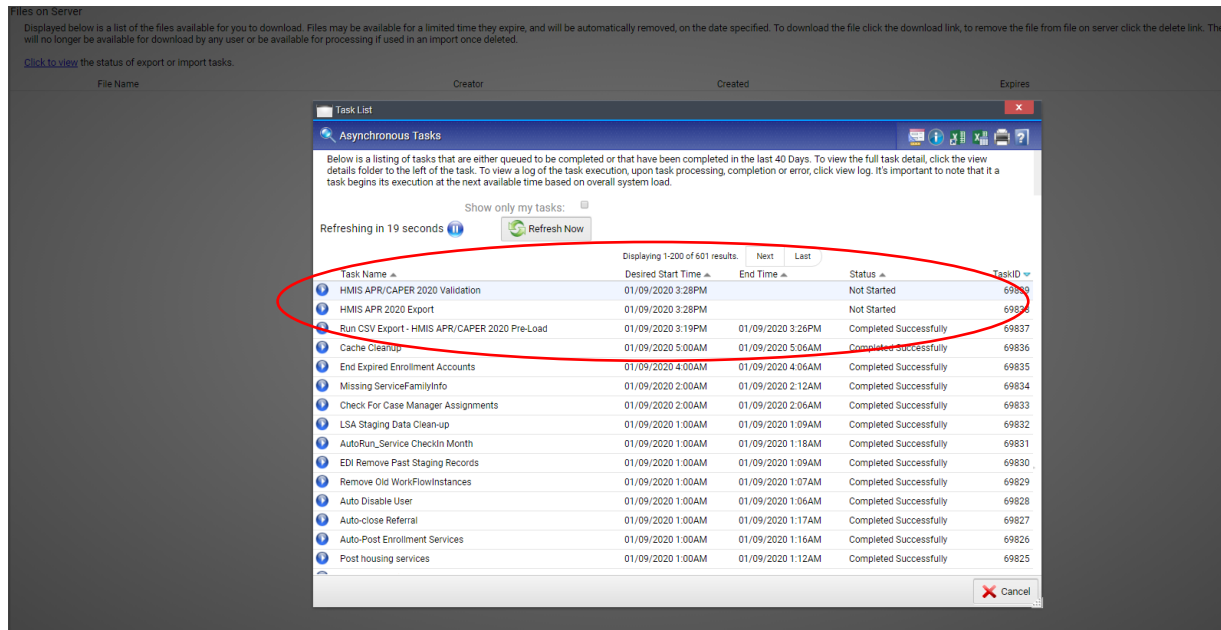


To verify the report is running, click on the “Click to view”



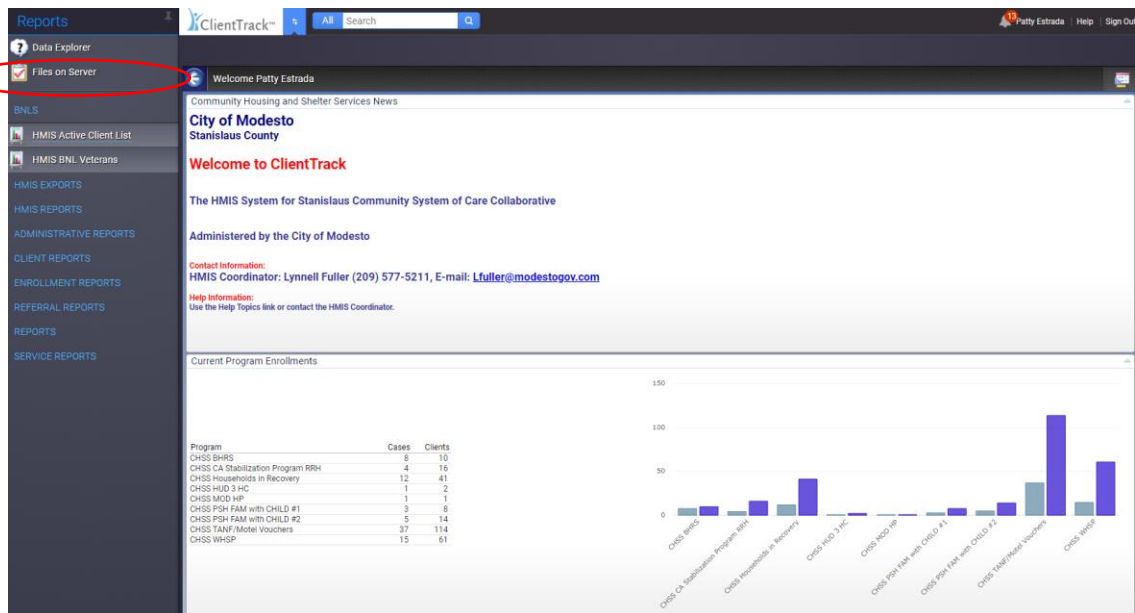
This will bring up the Asynchronous Tasks list. Here you can see the status of your report: Not Started, Processing, or Completed Successfully

This will bring up the Asynchronous Tasks list. Here you can see the status of your report: Not Started, Processing, or Completed Successfully



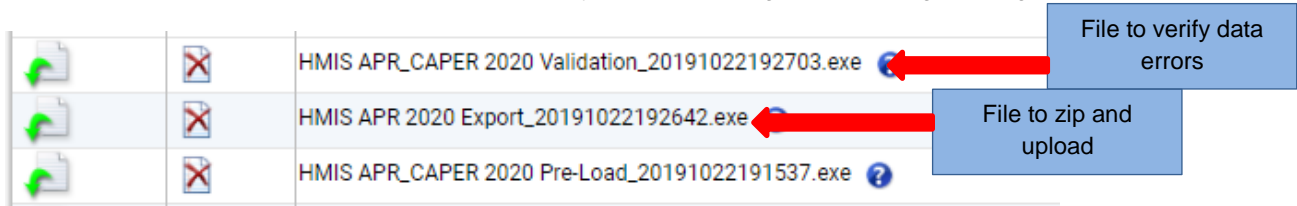
**Note:** While the report is generating, you may perform other task within other workspaces in ClientTrack, this will not interrupt the report process.

To check if your report is ready, you can find it by selecting: **Reports Workspace> Reports>Files on Server**



**\*Note:** Files On Server can also be accessed by selecting My Saved Reports>Files on Server

You are going to be working with the **HMIS APR 2020 Validation**, formally called the Data Validation File, to verify your data for errors etc. The **HMIS APR 2020 Export** is the file you will be zipping and uploading into Sage HMIS.



Once the report is showing, click on the Green Arrow next to the report you would like to Run

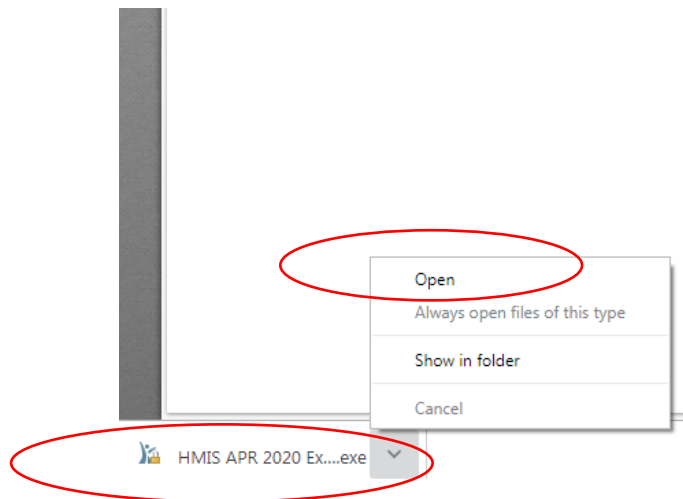
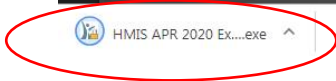
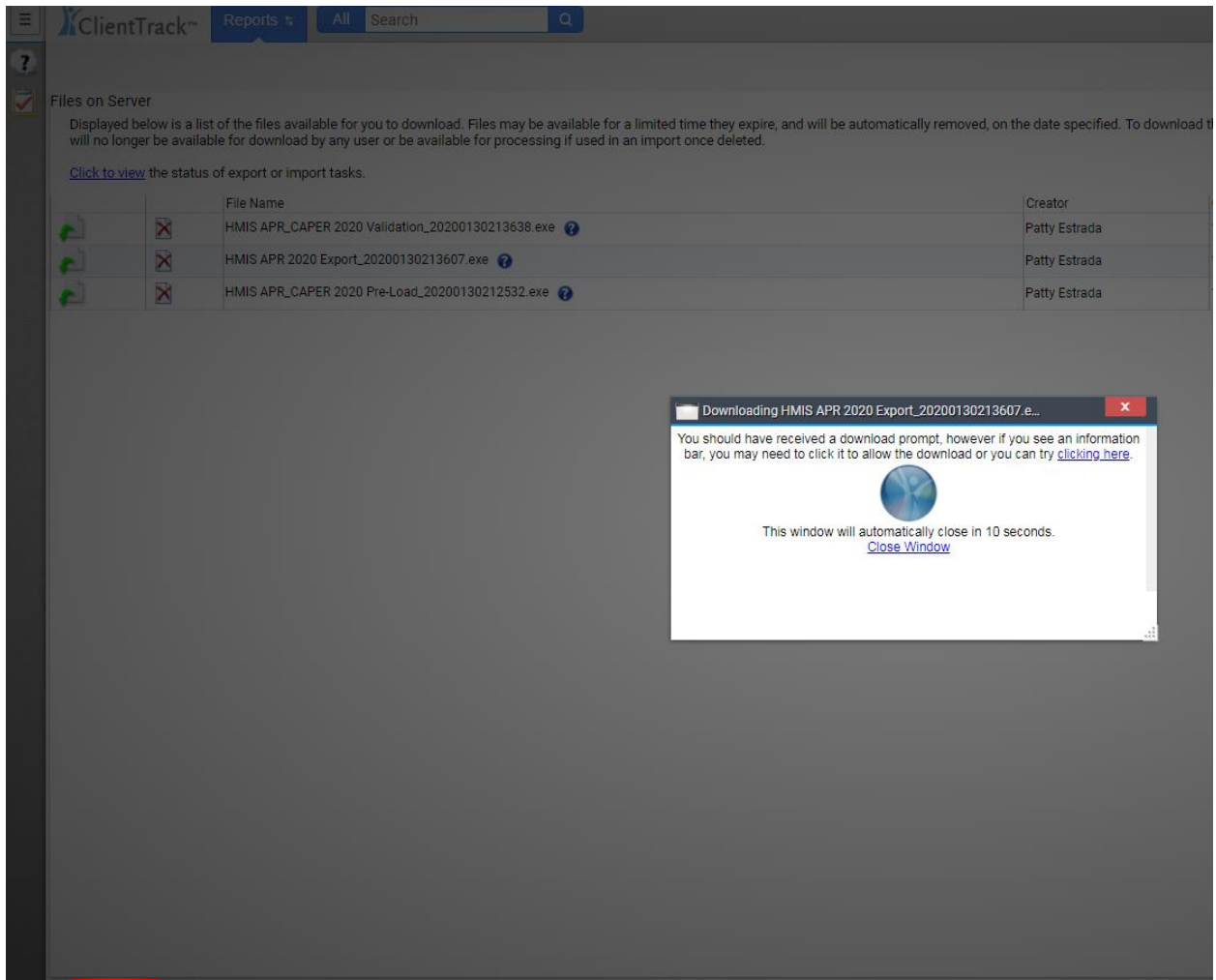
Files on Server

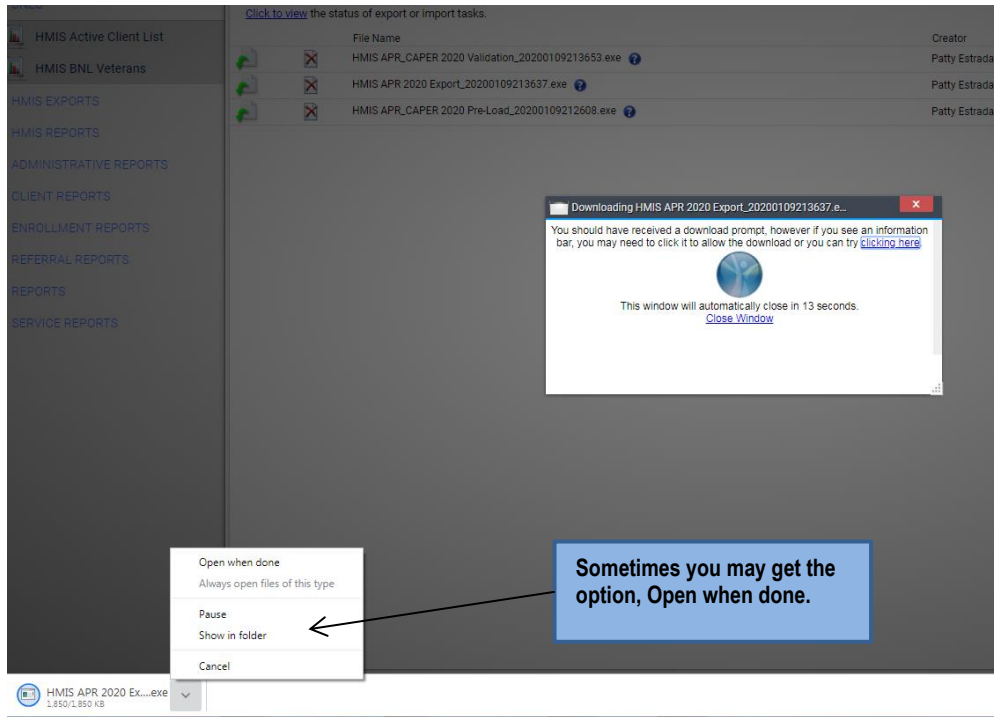
Displayed below is a list of the files available for you to download. Files may be available for a limited time they expire, and will be automatically removed, on the date specified. To download the file click the download link, to remove the file from file on server click the delete link. The file will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

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

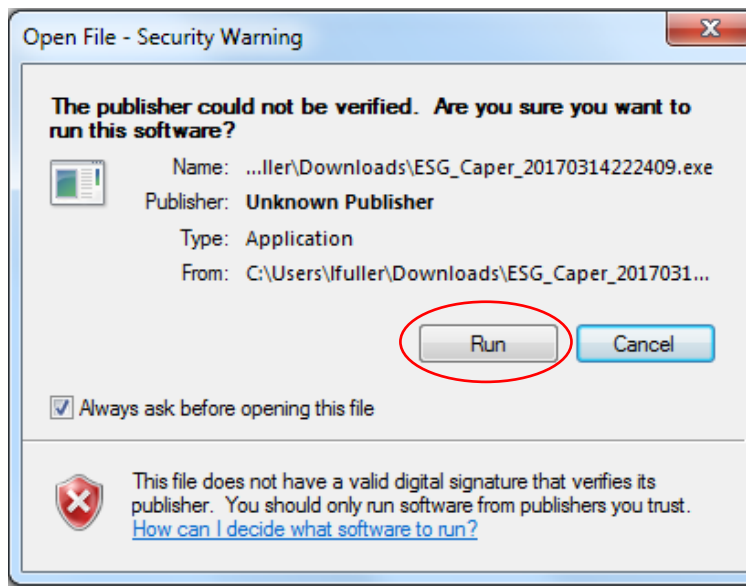
	File Name	Creator	Created	Expires
	HMIS APR_CAPER 2020 Validation_20200130213638.exe	Patty Estrada	1/30/2020 9:36:39 PM	2/29/2020 9:36:39 PM
	HMIS APR 2020 Export_20200130213607.exe	Patty Estrada	1/30/2020 9:36:09 PM	2/29/2020 9:36:09 PM
	HMIS APR_CAPER 2020 Pre-Load_20200130212532.exe	Patty Estrada	1/30/2020 9:25:32 PM	2/29/2020 9:25:32 PM

The report will begin to download, once complete, you will click to open the file.





Click on Run, Security Warning, click on "Run"



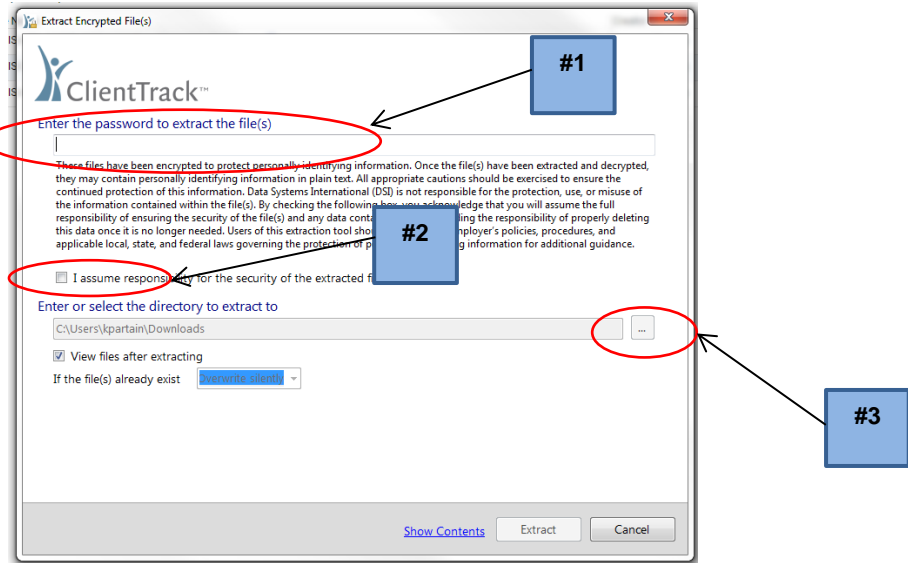


You will then be prompted to:

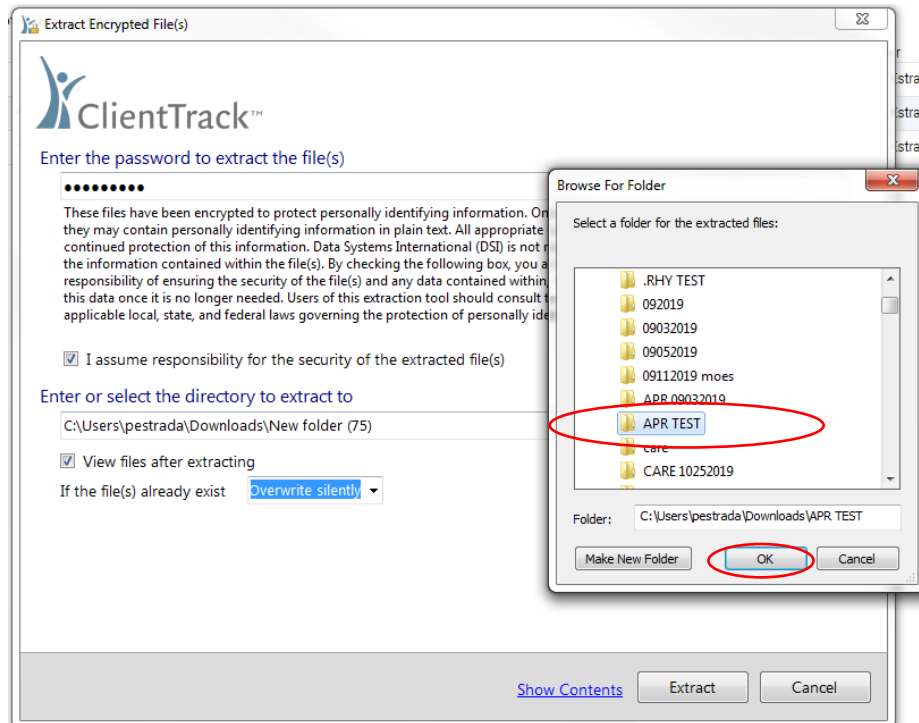
**#1.** Put in the Password you created

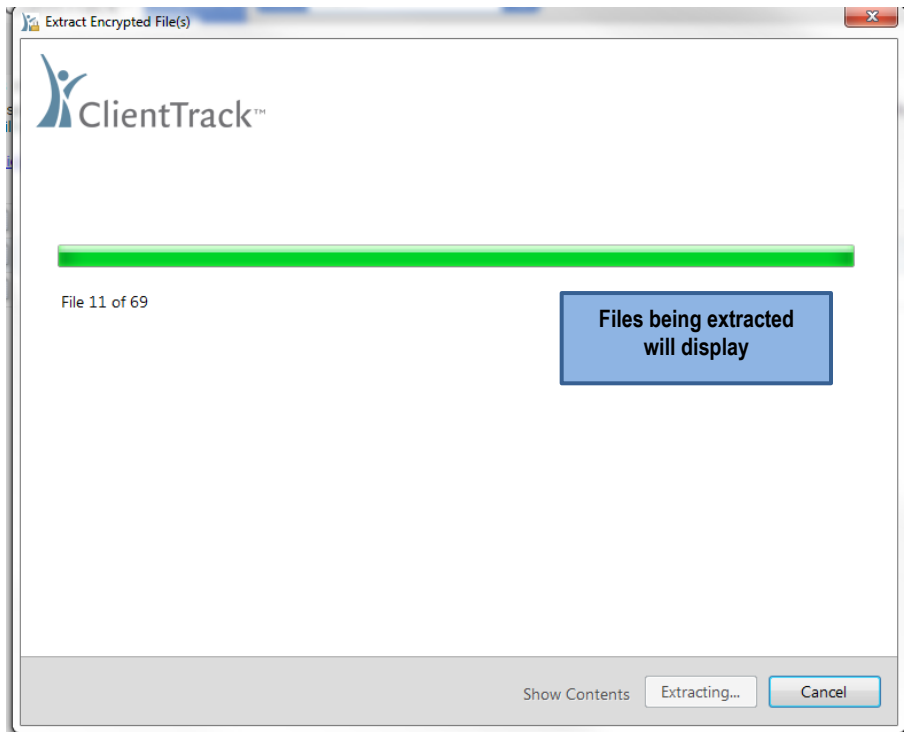
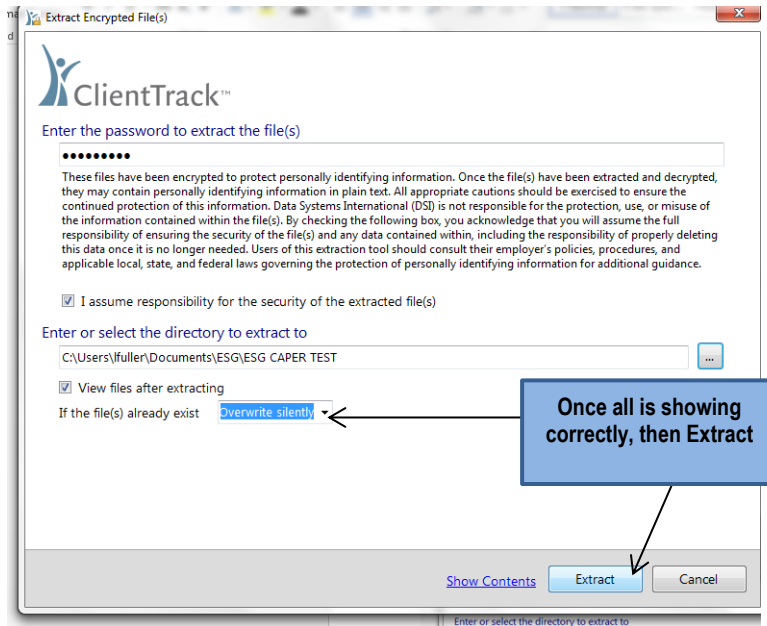
**#2.** Mark "I assume responsibility for the security of the extracted file(s)"

**#3.** Tell the system where you want the extracted file to go before you extract the file



You can create a new folder by clicking **Make New Folder**, then once it is highlighted on the folder you want, click **OK**





APR TEST

Print New folder

Name	Date modified	Type	Size
Q4a.csv	1/30/2020 1:35 PM	Microsoft Excel C...	2 KB
Q5a.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q6a.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q6b.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q6c.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q6d.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q6e.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q6f.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q7a.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q7b.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q8a.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q8b.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q9a.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q9b.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q10a.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q10b.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q10c.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q11.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q12a.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q12b.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q13a1.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q13a2.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q13b1.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q13b2.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q13c1.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q13c2.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q14a.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q14b.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q15.csv	1/30/2020 1:35 PM	Microsoft Excel C...	2 KB
Q16.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q17.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q18.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q19a1.csv	1/30/2020 1:35 PM	Microsoft Excel C...	2 KB
Q19a2.csv	1/30/2020 1:35 PM	Microsoft Excel C...	2 KB
Q19b.csv	1/30/2020 1:36 PM	Microsoft Excel C...	2 KB
Q20a.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB
Q20b.csv	1/30/2020 1:35 PM	Microsoft Excel C...	1 KB

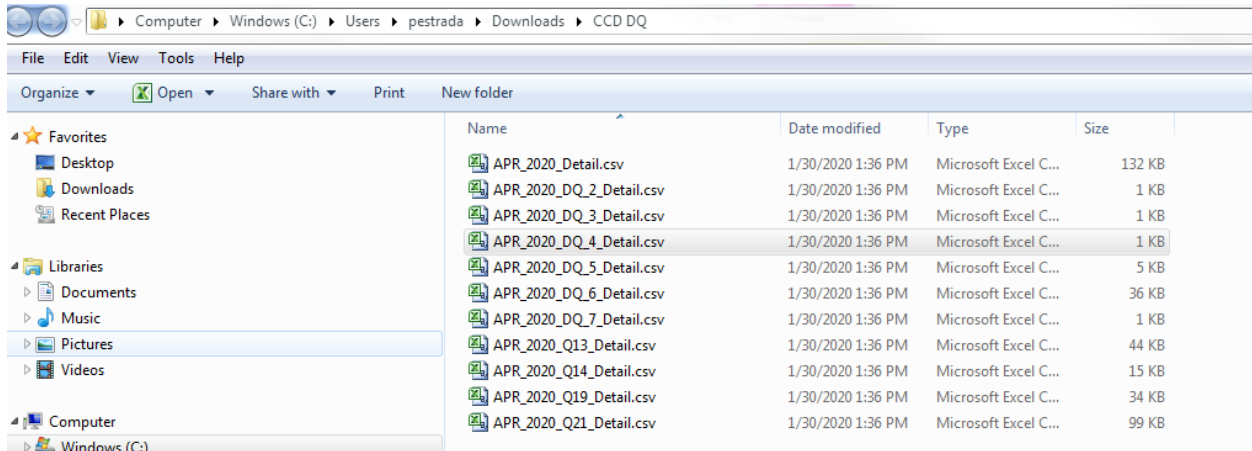
(Q5a)

Total Number of Persons Served	22
Number of Adults (age 18 or over)	10
Number of Children (under age 18)	12
Number of Persons with Unknown Age	0
Number of leavers	0
Number of adult leavers	0
Number of adult and head of household leavers	0
Total Number of Stayers	22
Number of Adult Stayers	10
Number of Veterans	0
Number of Chronically Homeless Persons	22
Number of youth under age 25	0
Number of parenting youth under age 25 with children	0
Number of Adult Heads of Household	8
Number of child and unknown-age heads of household	0
Heads of households and adult stayers in the project 365 days or more	8

(Q6A)

Data Element	Client Doc	Informati	Data Issue	Total	% of Error Rate
Name (3.01)	0	0	0	0	0
Social Security Number (3.02)	0	0	0	0	0
Date of Birth (3.03)	0	0	0	0	0
Race (3.04)	0	0	0	0	0
Ethnicity (3.05)	0	0	0	0	0

To correct any data issues, you must go through the APR Validation Report to know which client has any issues.



You will see all information entered into HMIS on the clients and you go through each section that an error is showing, Date of Birth there is a #2 which is Approximate or partial.

Name	Qua	SSN	SSNQualit	Birthdate	BirthDate	Races	HUDEthnic
	1		1	8/3/1996	1	5	0
	1		1	#####	1	3	0
	1		1	#####	2	5	0
	1		1	#####	1	5	1

### 3.3.2 DOBDataQuality

Value	Text
1	Full DOB reported
2	Approximate or partial DOB reported
8	Client doesn't know
9	Client refused
99	Data not collected

You will need to go into HMIS, bring up client ID, Edit Client and Correct the DOB Quality to Full DOB

HMIS CSV Format

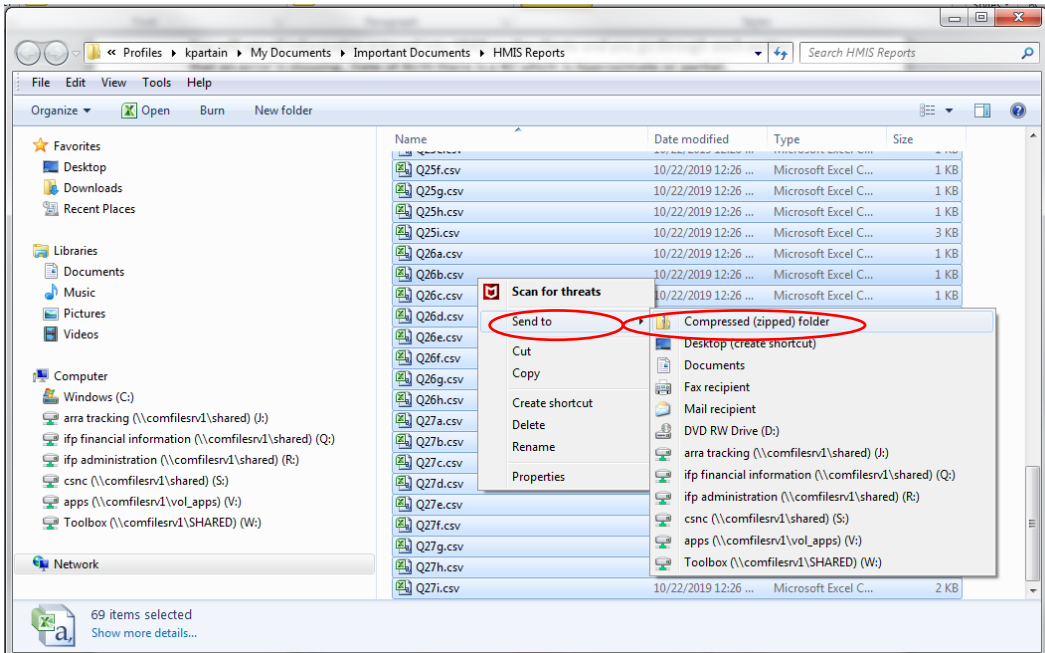
Specifications <https://hudhdx.info/Resources/Vendors/HMIS%20CSV%20Specifications%20FY2020%20v1.1.pdf>

HMIS FY 2020 Data Dictionary <https://files.hudexchange.info/resources/documents/HMIS-Data-Dictionary.pdf>

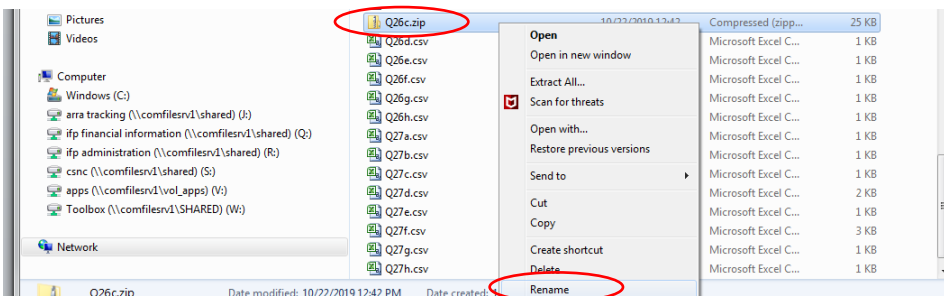
HUD CoC APR and HUD ESG CAPER HMIS Programming

Specifications <https://files.hudexchange.info/resources/documents/HMIS-Programming-Specifications.pdf>

Once all errors are corrected in HMIS you will run the report again, highlight all files, and right-click to send to Compressed (zipped) folder.

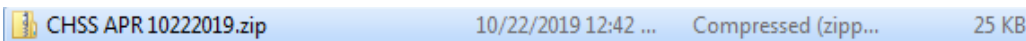


Highlight the zipped folder and right-click to Rename



Then your folder is ready to be sent to your Manager for the upload in Sage HMIS

**REMEMBER:** Do not open the zip folder as it can change the format of the data



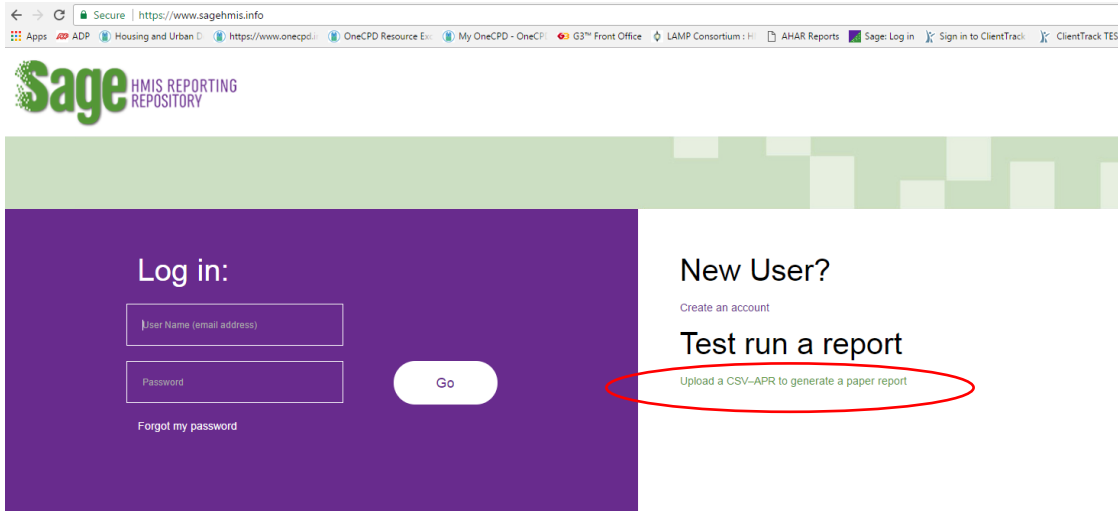
**REMINER: YOU CAN NOT CHANGE THE DATA IN THE EXCEL SPREADSHEET, YOU MUST CHANGE THE DATA IN HMIS**

## Verifying APR Report Data in Sage HMIS to Generate a Report



You do not need a log in to verify or generate your APR report in Sage HMIS.

[www.sagehmis.info](http://www.sagehmis.info) and click on the **Upload a CSV-APR** to generate a paper report link.



Click on **Select a Report** and choose **CSV-APR FY2020** from the drop-down menu



Then click on **Choose File** and when your Documents show, choose the file you want to upload, making sure it does not have client level data. Click on the correct file you wish to upload and then **Open**



Please select a report that you wish to test from the dropdown list below:

CSV-APR FY2020

### Test a CSV-APR FY2020

Sage requires a CSV-APR FY2020 generated by your HMIS (or comparable data base for DV providers) in a .zip file, to be uploaded to the system. Follow the steps below to test your CSV-APR file and/or to create a printable version of your CSV-APR FY2020.

1. Download the CSV-APR from your HMIS or comparable database and save it to your computer. Remember where you place it – so you can find it.
2. Click the browse button below. Your computer's file directory will appear. Find the CSV-APR Report you saved and double click on it.
3. Check the box next to "I am not a Robot" and complete the verification steps if necessary.
4. Click on "Upload and Test" button to upload the file from your computer to Sage.
5. A results message will show:  
*If there are no errors in the file Sage will tell you the CSV passed. Click the "Create Report" button and Sage will produce a printable version of your APR.*  
*If there are errors, you will need to fix the problem(s) in your HMIS or comparable database and download a new CSV-APR.*  
*You can enter your email address and click "Go" if you want a copy of the errors sent to you. Refer to the Sage guidebook in the Resources tab for additional instructions.*
6. If you want to test another CSV, repeat the process outlined above.

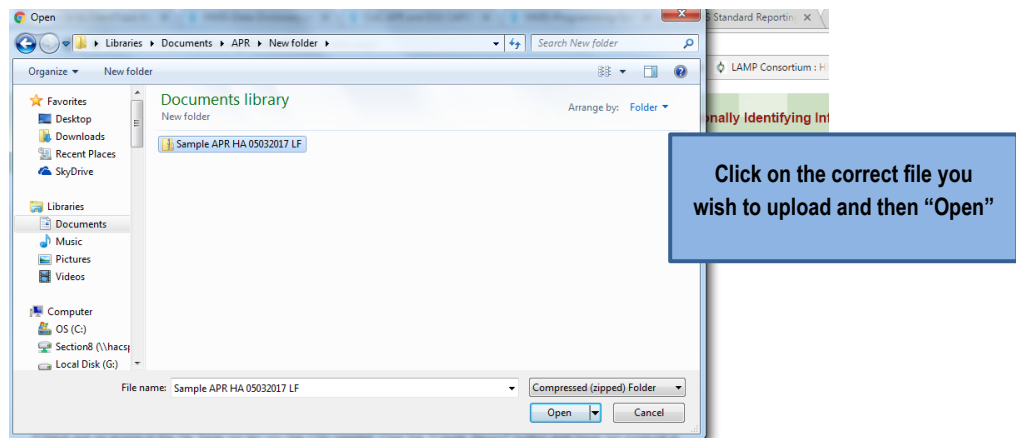
Choose File No file chosen

I'm not a robot

reCAPTCHA  
Privacy - Terms

Upload and Test

Your Documents will show, you will need to choose the file you want to upload making sure it does not have client level data



printable version of your APR.  
*If there are errors, you will need fix the problem(s) in your HMIS or comparable database and download a new CSV-APR.*  
*You can enter your email address and click "Go" if you want a copy of the errors sent to you. Refer to the Sage guidebook in the Resources tab for additional instructions.*

6. If you want to test another CSV, repeat the process outlined above.

Choose File No file chosen

NOTE: Testing an APR on this page DOES NOT attach the CSV-APR to an APR submission. In order to

You will then have to click on "I'm not a robot" and answer the question

3. Check the box next to "I am not a Robot" and complete the verification steps if necessary.

4. Click on "Upload and Test" button to upload the file from your computer to Sage.

5. A results message will show:

If there are no errors in the file Sage will tell you the CSV passed. Click the "Create Report" button and Sage will produce a printable version of your APR.

If there are errors, you will need fix the problem(s) in your HMIS or comparable database and download a new CSV-APR. You can enter the errors sent to you. Refer to the Sage guidebook in the Resources tab for additional instructions.

6. If you want to test another CSV, repeat the process outlined above.

You can enter your email address and click "Go" if you want a copy of the errors sent to you. Refer to the Sage guidebook in the Resources tab for additional instructions.

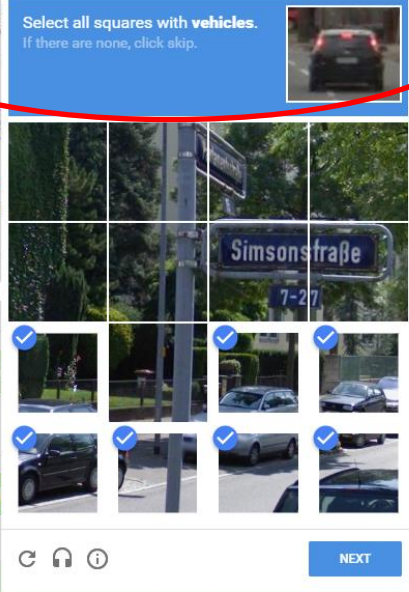
Choose File

NOT submitted

Upload and Test

CANCEL

Select all squares with vehicles. If there are none, click skip.



Simonsstraße  
7-27

NEXT

Then click on Upload and Test

If there are errors, you will need fix the problem(s) in your HMIS or comparable database and download a new CSV-APR.

You can enter your email address and click "Go" if you want a copy of the errors sent to you. Refer to the Sage guidebook in the Resources tab for additional instructions.

6. If you want to test another CSV, repeat the process outlined above.

Choose File Sample APR HA 05032017 LF.zip


NOTE: Testing an APR on this page DOES NOT attach the CSV-APR to an APR submission. In order to submit an APR, you must login to Sage and attach your CSV-APR on the Submission Launchpad page.

I'm not a robot

reCAPTCHA  
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Upload and Test

CANCEL





## Your data will show to the right of the screen

Sage does not collect client-level data. Do not submit full HMIS CSV files or any other type of files with Personally Identifying Information to Sage. ONLY files that the HMIS has indicated are in the CSV - APR REPORT format may be uploaded.

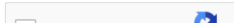
### Test a CSV-APR

Sage requires a CSV-APR generated by your HMIS (or comparable data base for DV providers) in a zip file, to be uploaded to the system. Follow the steps below to test your CSV-APR file and/or to create a printable version of your CSV-APR.

- Download the CSV-APR from your HMIS or comparable database and save it to your computer. Remember where you save it – so you can find it.
- Click the browse button below. Your computer's file directory will appear. Find the CSV-APR Report you saved and double-click on it.
- Check the box next to "I am not a Robot" and complete the verification steps if necessary.
- Click on "Upload and Test" button to upload the file from your computer to Sage.
- A results message will show:  
 If there are no errors in the file Sage will tell you the CSV passed. Click the "Create Report" button and Sage will produce a printable version of your APR.  
 If there are errors, you will need fix the problem(s) in your HMIS or comparable database and download a new CSV-APR.  
 You can enter your email address and click "Go" if you want a copy of the errors sent to you. Refer to the Sage guidebook in the Resources tab for additional instructions.
- If you want to test another CSV, repeat the process outlined above.

Choose File No file chosen

NOTE: Testing an APR on this page DOES NOT attach the CSV-APR to an APR submission. In order to submit an APR, you must login to Sage and attach your CSV-APR on the Submission Launchpad page.



#### Q4a. Project Identifiers

Organization name	Housing Authority Shelter Plus Care
Organization ID	HA2
Project name	HACS SPC 1-4 & 6-8
Project ID	19668
HMIS Project Type	3
Method of tracking ES	
If HMIS Project ID = 6 (S Only), is the Services Only (HMIS Project Type 6) affiliated with a residential project?	
Identify the Project ID's of the housing projects this project is affiliated with	

NOTE: If your APR was run for multiple projects together in a single report, only the first 8 rows from Q4a.csv are imported to Sage.

#### Q5. Report Validations

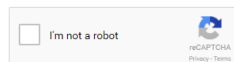
1. Total number of persons served	2
2. Number of adults (age 18 or over)	2
3. Number of children (under age 18)	0
4. Number of persons with unknown age	0
5. Number of leavers	0
6. Number of adult leavers	0
7. Number of adult and head of household leavers	0
8. Number of stayers	2
9. Number of adult stayers	2
10. Number of veterans	0
11. Number of chronically homeless persons	0
12. Number of youth under age 25	0
13. Number of parenting youth under age 25 with children	0
14. Number of adult heads of household	1
15. Number of child and unknown-age heads of household	0
16. Heads of households and adult stayers in the project 365 or more days	2

## You can then create a report by clicking on the "Create Report" button

- Check the box next to "I am not a Robot" and complete the verification steps if necessary.
- Click on "Upload and Test" button to upload the file from your computer to Sage.
- A results message will show:  
 If there are no errors in the file Sage will tell you the CSV passed. Click the "Create Report" button and Sage will produce a printable version of your APR.  
 If there are errors, you will need fix the problem(s) in your HMIS or comparable database and download a new CSV-APR.  
 You can enter your email address and click "Go" if you want a copy of the errors sent to you. Refer to the Sage guidebook in the Resources tab for additional instructions.
- If you want to test another CSV, repeat the process outlined above.

Choose File No file chosen

NOTE: Testing an APR on this page DOES NOT attach the CSV-APR to an APR submission. In order to submit an APR, you must login to Sage and attach your CSV-APR on the Submission Launchpad page.



Upload and Test

#### Results

✓ The CSV-APR has passed all validations. Review the Project Identifiers and Report Validations, then click 'Create Report'.

CANCEL

Create Report

Project name	SPC 1-4 & 6-8
Project ID	19668
HMIS Project Type	3
Method of tracking ES	
If HMIS Project ID = 6 (S Only), is the Services Only (HMIS Project Type 6) affiliated with a residential project?	
Identify the Project ID's of the housing projects this project is affiliated with	

NOTE: If your APR was run for multiple projects together in a single report, only the first 8 rows from Q4a.csv are imported to Sage.

6. Number of adult leavers	0
7. Number of adult and head of household leavers	0
8. Number of stayers	2
9. Number of adult stayers	2
10. Number of veterans	0
11. Number of chronically homeless persons	0
12. Number of youth under age 25	0
13. Number of parenting youth under age 25 with children	0
14. Number of adult heads of household	1
15. Number of child and unknown-age heads of household	0
16. Heads of households and adult stayers in the project 365 or more days	2

The report will take a few minutes to generate

you the CSV passed. Click the "Create Report" button and Sage will produce a  
em(s) in your HMIS or comparable database and download a new CSV-APR.  
Go" if you want a copy of the errors sent to you. Refer to the Sage guidebook in  
rocess outlined above.

Method of tracking ES  
If HMIS Project ID = 6 (S Only), is the  
Services Only (HMIS Project Type 6)  
affiliated with a residential project?  
Identify the Project ID's of the  
housing projects this project is  
affiliated with

9. Number of ad  
10. Number of v  
11. Number of C  
12. Number of v  
13. Number of p  
with children  
14. Number of a  
15. Number of e  
of household  
16. Heads of ho  
the project 365

NOTE: If your APR was run for multiple projects  
together in a single report, only the first 8 rows  
from Q4a.csv are imported to Sage.

**Please wait... Sage is  
saving you from typing  
over 2,700 fields of data...**

ES NOT attach the CSV-APR to an APR submission. In order to  
and attach your CSV-APR on the Submission Launchpad page

Once done, you can click on "View this report"

Choose File No file chosen

NOTE: Testing an APR on this page DOES NOT attach the CSV-APR to an APR submission. In order to submit an APR, you must login to Sage and attach your CSV-APR on the Submission Launchpad page.

I'm not a robot

reCAPTCHA  
Privacy - Terms

Upload and Test

**Results**

✓ This CSV-APR is now ready for printing.

[VIEW THIS REPORT](#)

DONE

Your report will then show, you can right click to print

Q04a: Project Identifiers in HMIS

Organization Name	
Organization ID	
Project Name	
Project ID	
HMIS Project Type	
Method of Tracking ES	
Is the Services Only (HMIS Project Type 6) affiliated with a residential project?	
Identify the Project ID's of the Housing Projects this Project is Affiliated with	

Make sure all data is correct. Verify the organization name, project name, etc.

Q05a: Report Validations Table

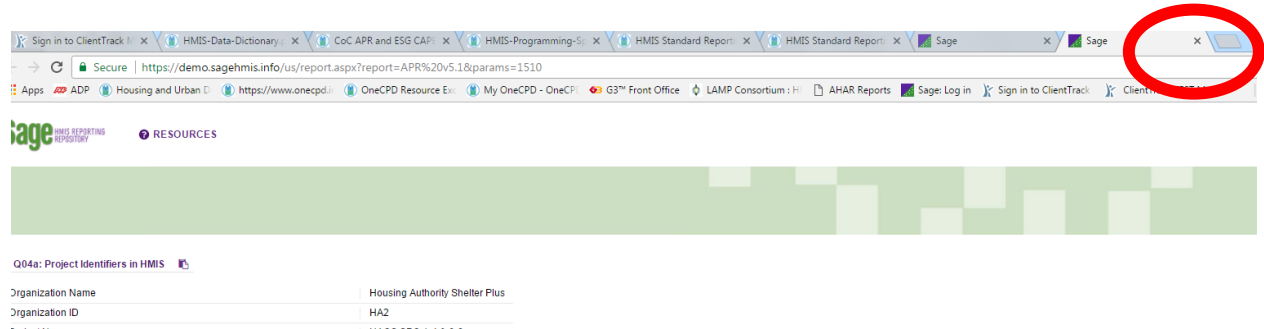
Total Number of Persons Served	32
Number of Adults (Age 18 or Over)	30
Number of Children (Under Age 18)	2
Number of Persons with Unknown Age	0
Number of Leavers	16
Number of Adult Leavers	15
Number of Adult and Head of Household Leavers	15
Number of Stayers	16
Number of Adult Stayers	15
Number of Veterans	0
Number of Chronically Homeless Persons	0
Number of Youth Under Age 25	30

Q06a: Data Quality: Personally Identifying Information (PII)

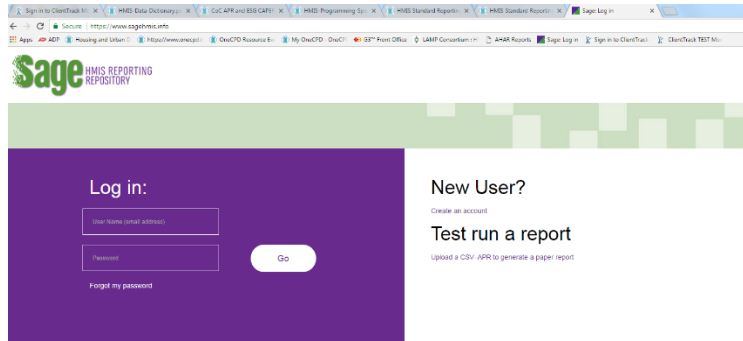
Data Element	Client Doesn't Know/Refused	Information Missing	Data Issues	% of Error Rate
Name	0	0	0	0.00 %
Social Security Number	0	0	0	0.00 %
Date of Birth	0	0	0	0.00 %
Race	0	0	0	0.00 %
Ethnicity	0	0	0	0.00 %
Gender	0	0	0	0.00 %
Overall Score				0.00 %

Q06b: Data Quality: Universal Data Elements

A new window will open in your browser with the report, once you are done, you can click on the X in the report browser to close



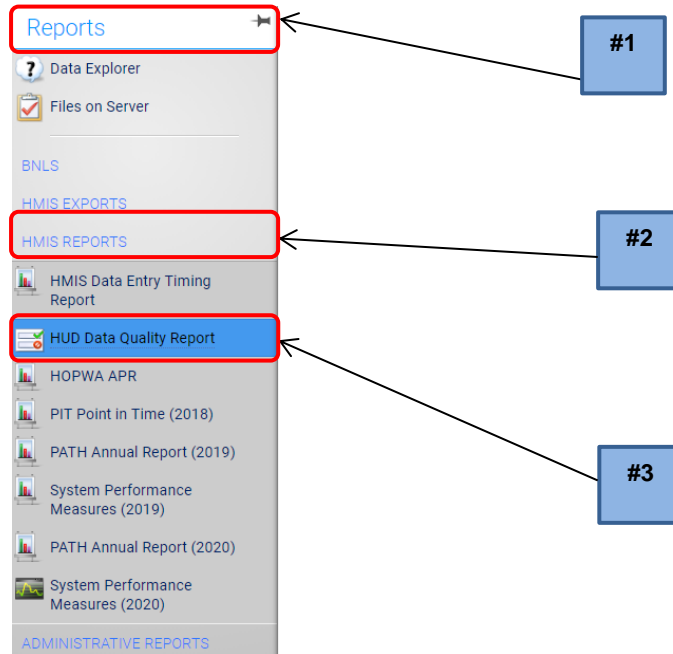
Once complete, it will take you back to the Sage HMIS home page



**REMINDER: YOU CAN NOT CHANGE THE DATA IN SAGE HMIS, FOR ANY DATA ISSUES, YOU MUST CHANGE THE DATA IN HMIS**

## HUD Data Quality Report

From the Reports Workspace>HMIS Reports> HUD Data Quality Report



- #1. Select Begin Date Range
- #2. Choose Grants, Program Type, Program

Report A will generate, to view the second page, click on the arrow

**Q1. Report Validation Table**

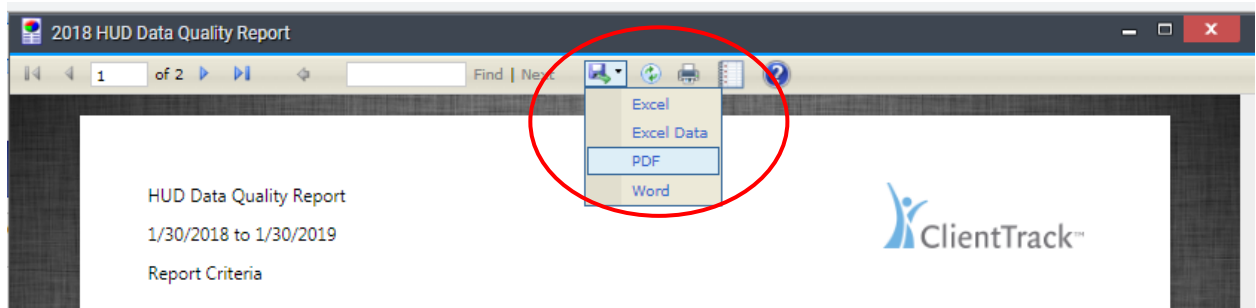
Total Number of Persons Served	12
Number of Adults (age 18 or over)	9
Number of Children (under age 18)	2
Number of Persons with Unknown Age	1
Number of leavers	1
Number of adult leavers	1
Number of adult and head of household leavers	1
Total Number of Stayers	11
Number of Adult Stayers	8
Number of Veterans	3
Number of Chronically Homeless Persons	0
Number of youth under age 25	1
Number of parenting youth under age 25 with children	1
Number of Adult Heads of Household	8
Number of child and unknown-age heads of household	1
Heads of households and adult stayers in the project 365 days or more	1

**Q2. Personally Identifiable Information (PII)**

Data Element	Client Doesn't Know / Refused	Information Missing	Data Issues	% of Error Rate
Name (3.1)	0	0	0	0.00%
Social Security Number (3.2)	1	0	0	8.33%
Date of Birth (3.3)	1	0	0	8.33%
Race (3.4)	0	0	0	0.00%
Ethnicity (3.5)	0	0	0	0.00%
Gender (3.6)	0	0	0	0.00%
Overall Score				8.33%

**Q3. Universal Data Elements**

You can then save to print by changing the format to PDF

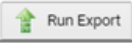


This report will not give you any clients' names or identifiable information

## DQ Detail Export

With the increased complexity and requirements of aggregate federal compliance reporting, access to client level data is critical to troubleshooting. To meet the need of client level data for several compliance reports, the APR, ESG, and DQ Detail Export will produce the list of active clients used in aggregate reports. This export can be used to identify clients with data quality errors and check aggregate counts.

The detail is an export that will be completed through asynchronous tasks, and the encrypted set of files will display on your Files and Server page when it has completed. The export consists of two files (shown below). The Data (Validation Only) file will pull Active Clients based on the project type and utilization method as defined in the Reporting Glossary. The Data DQ 7 file uses different logic to pull in clients that have applicable records to Question 7 of the HUD Data Quality Report. Depending on the project(s) selected, the Data DQ 7 file may or may not have data.

Report #B  will give you the detailed report.

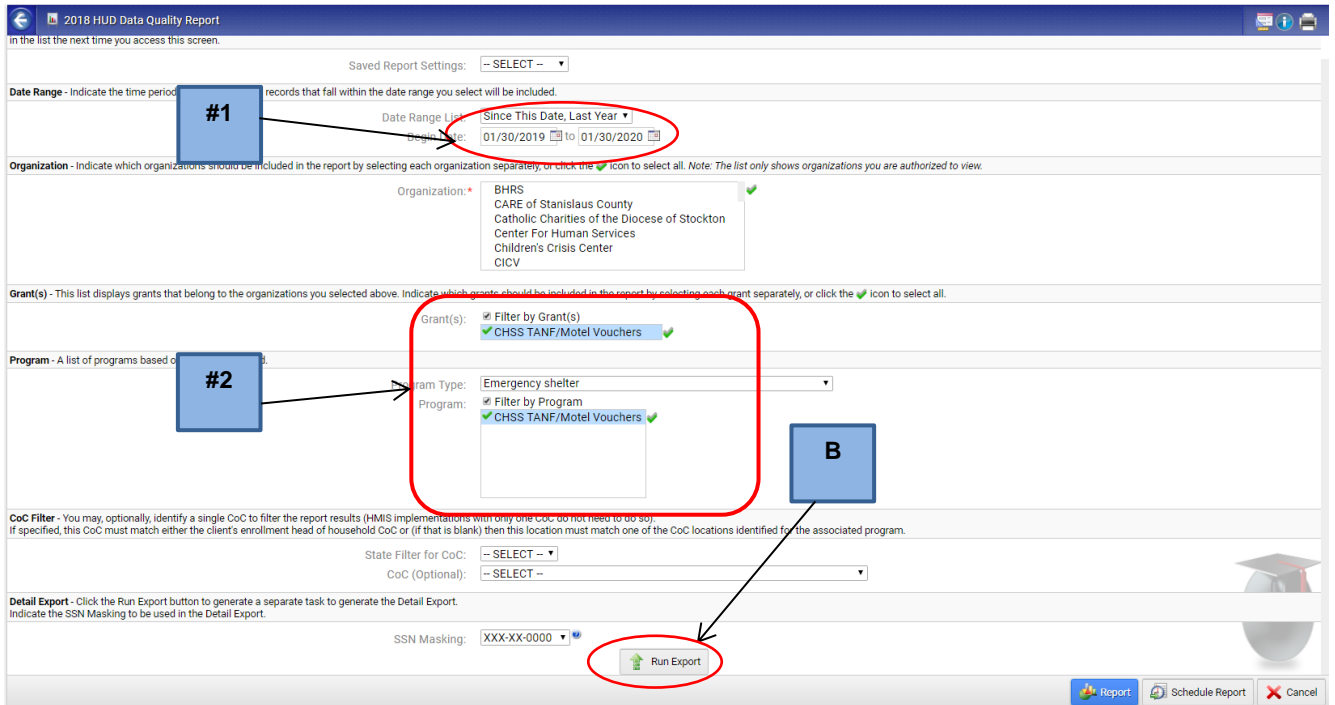
**Note:** This report can be generated for multiple projects at once

From the Reports Workspace>HMIS Reports>HUD Data Quality Report

There are several filter options available for the HUD Data Quality Report. The main required filters are the **Report Date Range, Organizations, Grants, and Programs**

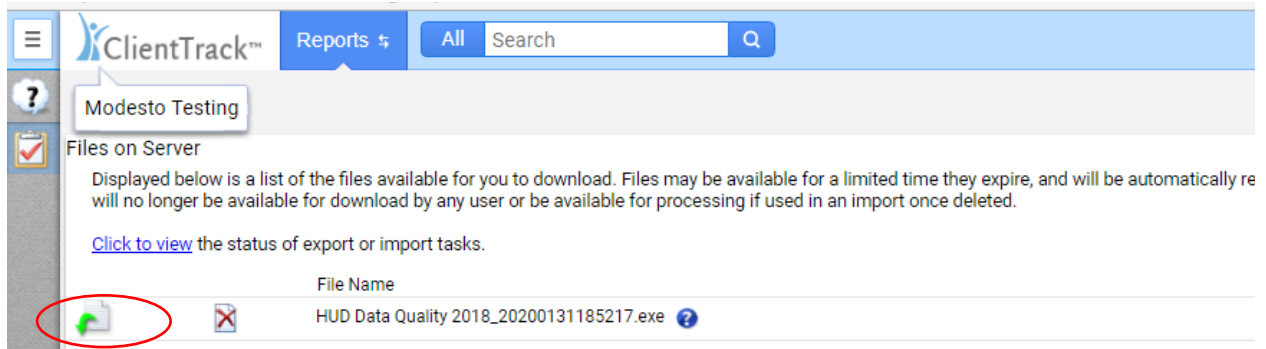
From the Reports Workspace>HMIS Reports> HUD Data Quality Report

- #1. Select Begin Date Range
- #2. Choose Grants, Program Type, Program

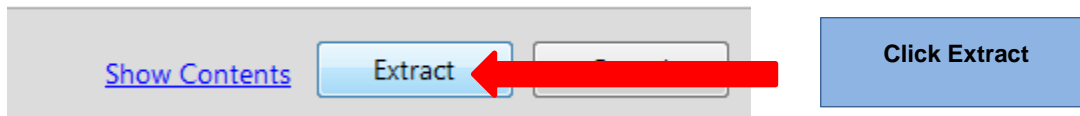
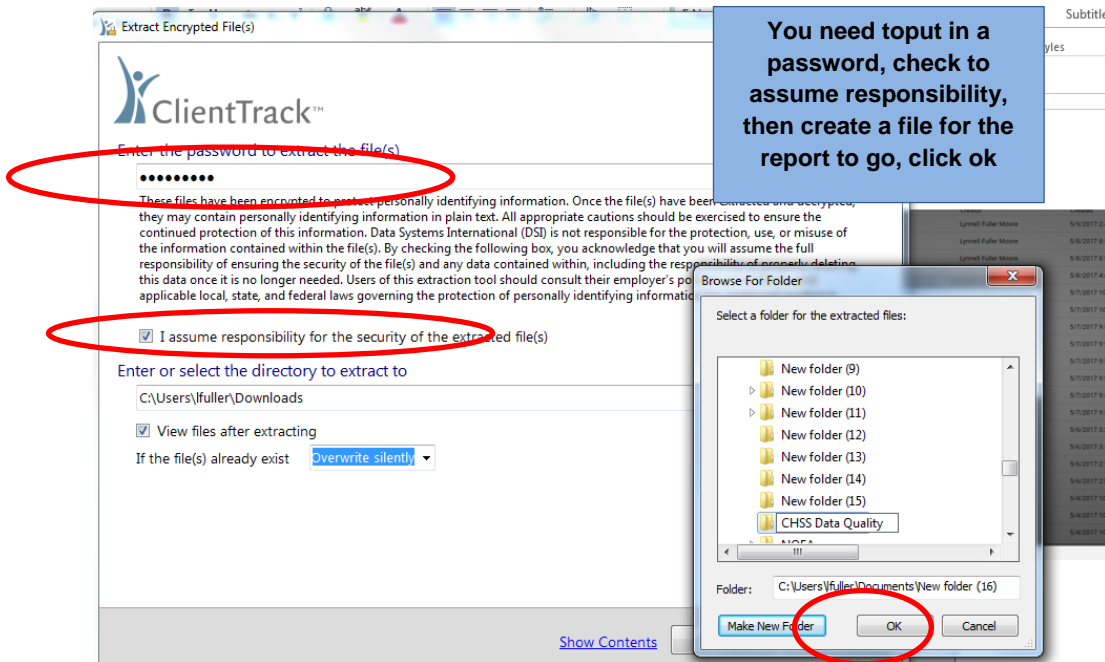
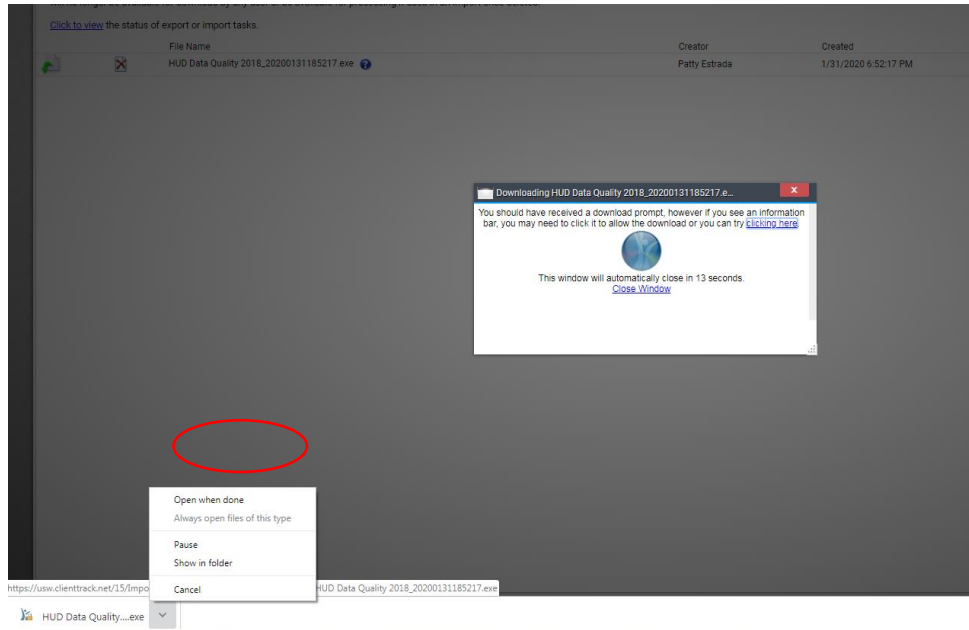


After setting your report filters and click Run Export, you can monitor the progress of the export on Asynchronous tasks. Please remember to refresh the Files on Server and Asynchronous tasks pages periodically if you are waiting on the export to finish.

Once your report is ready, select the green arrow to download



Download the file, then open





Name	Date modified	Type	Size
Data (Validation Only).csv	1/31/2020 10:52 AM	Microsoft Excel C...	6 KB
DQ_2_Detail (Validation Only).csv	1/31/2020 10:52 AM	Microsoft Excel C...	1 KB
DQ_3_Detail (Validation Only).csv	1/31/2020 10:52 AM	Microsoft Excel C...	1 KB
<b>DQ_4_Detail (Validation Only).csv</b>	<b>1/31/2020 10:52 AM</b>	<b>Microsoft Excel C...</b>	<b>1 KB</b>
DQ_5_Detail (Validation Only).csv	1/31/2020 10:52 AM	Microsoft Excel C...	1 KB
DQ_6_Detail (Validation Only).csv	1/31/2020 10:52 AM	Microsoft Excel C...	1 KB
DQ_7_Detail (Validation Only).csv	1/31/2020 10:52 AM	Microsoft Excel C...	1 KB
DQ1.csv	1/31/2020 10:52 AM	Microsoft Excel C...	1 KB
DQ2.csv	1/31/2020 10:52 AM	Microsoft Excel C...	1 KB
DQ3.csv	1/31/2020 10:52 AM	Microsoft Excel C...	1 KB
DQ4.csv	1/31/2020 10:52 AM	Microsoft Excel C...	1 KB
DQ5.csv	1/31/2020 10:52 AM	Microsoft Excel C...	1 KB
DQ6.csv	1/31/2020 10:52 AM	Microsoft Excel C...	1 KB
DQ7.csv	1/31/2020 10:52 AM	Microsoft Excel C...	1 KB

You will then start by opening each file and working any missing data or address data issues.

### Data (Validation Only) shows all clients data

ClientID	Relations	EnrollID	Enrollmer	FirstName	MiddleIni	LastName	Suffix	Name	NameQua	SSN	SSNQual	Birthdate	BirthDate	Races	HUDEthni	Gender	OtherGen	VeteranSt	Disabling	PriorResic	
	1		#####							1XXXXX	1	#####		1	5	1	1		1	0	16
	1		#####							1XXXXX	1	#####		2	1	0	0		0	1	1

### Data (DQ 2) this will show any Don't Know, Missing or Data Issues

	A	B	C	D	E	F
1	Data Element	clientid	Name	DontKnow	Missing	DataIssue
2	Social Security Number (3.2)	#####	#####			Yes
3	Social Security Number (3.2)	#####	#####	Yes		

## Using the Detail Export

The export will produce values consistent with the CSV and Data Dictionary specifications version 5.1. These values are produced from the compliance crosswalk mappings and what are used in compliance reporting specifications. Some key values from the specifications are as follows:

### HMIS Standard Reporting Terminology Glossary

<https://files.hudexchange.info/resources/documents/HMIS-Standard-Reporting-Terminology-Glossary.pdf>

### HMIS CSV Format Specifications V6.1

<https://hudhdx.info/Resources/Vendors/HMIS%20CSV%20Specifications%20FY2020%20v1.1.pdf>

### HMIS Data Standards Data Dictionary Version 1.2

<https://files.hudexchange.info/resources/documents/HMIS-Data-Dictionary.pdf>

No/Yes/Missing

Value	Text
0	No
1	Yes
8	Client Doesn't Know
9	Client Refused
99	Data Not Collected

Project Type

Value	Text
1	Emergency Shelter
2	Transitional Housing
3	PH – Permanent Supportive Housing
4	Street Outreach
6	Services Only
7	Other
8	Safe Haven
9	PH – Housing Only
10	PH – Housing with Services (no disability required for entry)
11	Day Shelter
12	Homelessness Prevention
13 (55 in CT)	PH – Rapid Rehousing
14	Coordinated Assessment

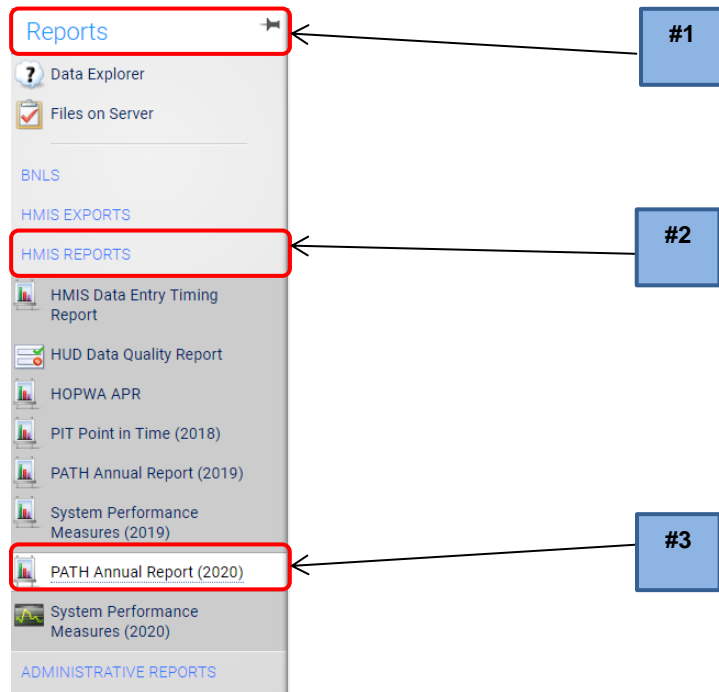
Relationship to Head of Household

Value	Text
1	Self (head of household)
2	Child
3	Spouse or partner
4	Other relative
5	Unrelated household member
99	Data not collected

**REMINDER: YOU CAN NOT CHANGE THE DATA ON THE EXCEL SPREADSHEET, YOU MUST CHANGE THE DATA IN HMIS**

## 2020 Annual PATH Report

From the Reports Workspace>HMIS Reports>PATH Annual Report 2020



**Running the Report:** The report dates you set identify the date range to find active clients. Active clients are those with a project stay in the date range and have a contact, Date of Engagement, Date PATH Status Determined, or PATH Funded service entered in the date range. Similar to other compliance reports, the **Organization**, **Grant**, and **Program** filters control the project stays to consider. PATH grantees typically have both a Services Only and Street Outreach type projects. Both should be selected to produce a combined report. If the CoC filter is selected, the report will only include project stays in that selected CoC as identified in the **Client Location** field. Where an active client has more than one applicable project stay, only data for the most recent project stay will be used with the exception of Question 12.

Complete all data fields, making sure your report shows



## Complete all fields

ClientTrack™ Reports All Search

2020 PATH Annual Report

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: -- SELECT --

Service Date Between: 07/01/2019 and 01/31/2020

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):  BHRS  
 CARE of Stanislaus County  
 Catholic Charities of the Diocese of Stockton  
 Center For Human Services  
 Children's Crisis Center  
 CICV

PATH 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. Additionally, on this report you can only filter by PATH grants.

Grant(s):  Filter by Grant(s)  
 BHRS  
 HHS PATH Street Outreach  
 HHS PATH Supportive Services

PATH 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)  
 CES Coordinated Access  
 PATH Street Outreach  
 PATH Supportive Services

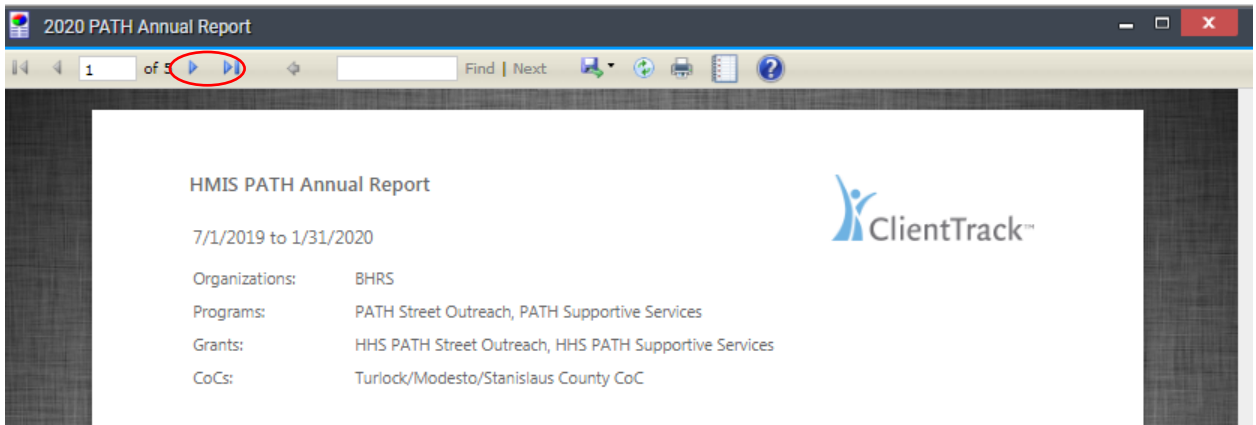
CoC Filter - You may, optionally, identify a single CoC to filter the report results (HMIS implementations with only one CoC do not need to do so).  
Note: This filter only applies to the initial client universe.  
If specified, this CoC must match either the client's enrollment household of household CoC or (if that is blank) then this location must match one of the CoC locations identified for the associated program.

State filter for CoC: -- SELECT --

CoC (optional): Turlock/Modesto/Stanislaus County CoC

Report Schedule Report Run Export Cancel

The report will generate, to view the additional pages, click on the arrow



## PATH Annual Report Output

The PATH report consists of the report tables for Questions 8-16, Question 17, Question 18, Questions 19-27, and Question 28. The report tables reflect the format specified by HUD in the programming specifications. In addition to this output, Eccovia Solutions provides 2 detail reports.

**NOTE:** The 2020 PATH Annual Report is a formatted report that will come up in its own window; you can download the aggregate report in the same formats as our other HMIS Reports.

HMIS PATH Annual Report

7/1/2019 to 1/31/2020

Organizations: BHRS

Programs: PATH Street Outreach, PATH Supportive Services

Grants: HHS PATH Street Outreach, HHS PATH Supportive Services

CoCs: Turlock/Modesto/Stanislaus County CoC

Questions 8 - 16: Persons served

Persons served during this reporting period:	Count
8. Number of persons contacted by PATH-funded staff this reporting period	33
9. Number of new persons contacted this reporting period in a PATH Street Outreach project	12
10. Number of new persons contacted this reporting period in a PATH Services Only project	10
11. Total number of new persons contacted this reporting period (#9 + #10 = total new clients contacted)	22
12a. Instances of contact this reporting period prior to date of enrollment	12
12b. Total instances of contact during the reporting period	17
13. Number of new persons contacted this reporting period who could not be enrolled because of ineligibility for PATH	0
14. Number of new persons contacted this reporting period who became enrolled in PATH	10
15. Number with active, enrolled PATH status at any point during the date range	13
16. Number of active, enrolled PATH clients receiving community mental health services through any funding source at any point during the reporting period	2

### Accessing Client Level Data

Persons Served Detail

The persons served detail report includes enrollment level details about clients included in questions 8-16.

2020 PATH Annual Report

HMIS PATH Annual Report

7/1/2019 to 1/31/2020

Organizations: BHRS  
 Programs: PATH Street Outreach, PATH Supportive Services  
 Grants: HHS PATH Street Outreach, HHS PATH Supportive Services  
 CoCs: Turlock/Modesto/Stanislaus County CoC

Questions 8 – 16: Persons served

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14. Number of new persons contacted this reporting period who became enrolled in PATH	10
15. Number with active, enrolled PATH status at any point during the date range	13
16. Number of active, enrolled PATH clients receiving community mental health services through any funding source at any point during the reporting period	2

ClientTrack™

Click on the underlined to expand the detail the section

Report Viewer

Persons Served Detail

Questions 8 – 16

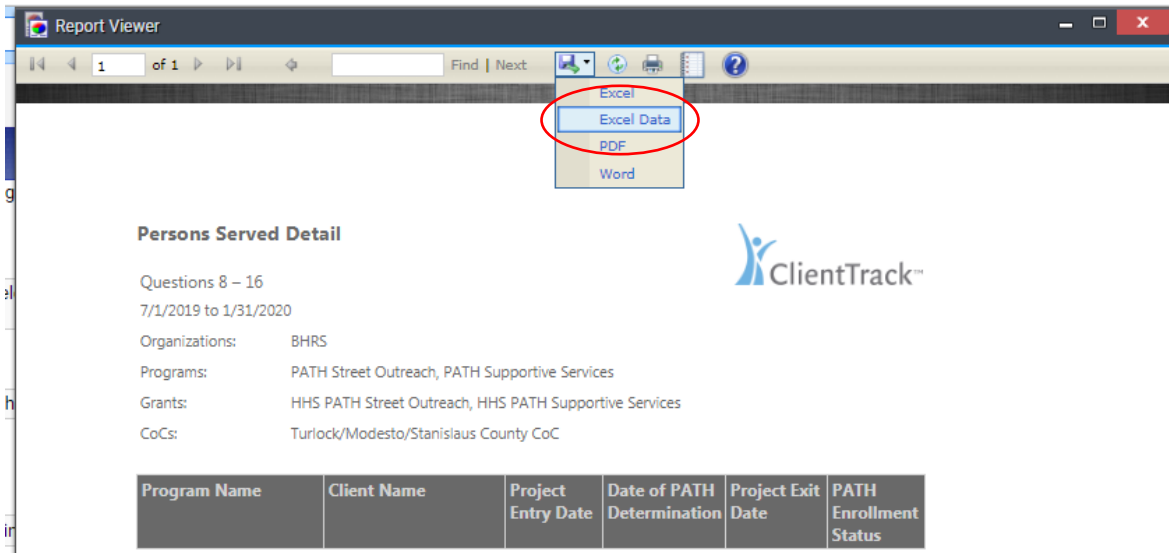
7/1/2019 to 1/31/2020

Organizations: BHRS  
 Programs: PATH Street Outreach, PATH Supportive Services  
 Grants: HHS PATH Street Outreach, HHS PATH Supportive Services  
 CoCs: Turlock/Modesto/Stanislaus County CoC

ClientTrack™

Program Name	Client Name	Project Entry Date	Date of PATH Determination	Project Exit Date	PATH Enrollment Status
PATH Street Outreach	Bourne, Jason Charles	10/24/2017			
PATH Street Outreach	Price, Carl	09/09/2019	09/09/2019	09/16/2019	Yes
PATH Street Outreach	Mori, Samuel	09/09/2019		09/16/2019	
PATH Street Outreach	Sanders, Betty D	09/18/2019	09/18/2019	09/18/2019	Yes
PATH Street Outreach	King, Irvin	09/01/2018		09/24/2019	
PATH Street Outreach	Tribble, Patricia	09/20/2019	09/24/2019		Yes
PATH Street Outreach	Bentley, Patricia	09/24/2019	09/24/2019	10/03/2019	No
PATH Street Outreach	Reyes, Octavia R	09/24/2019	09/24/2019		Yes
PATH Street Outreach	Foy, Darrin E	09/24/2019	09/24/2019		Yes
PATH Street Outreach	Espinoza, Sunny	09/01/2019	09/24/2019		Yes
PATH Street Outreach	Jones, Melvin	09/11/2019			
PATH Street Outreach	Sanchez, Rick	09/26/2019		09/26/2019	
PATH Street Outreach	Camacho, Alex Womach	05/01/2019			

To access the full client level detail used in the report, choose the Excel Data option from the detail report window.



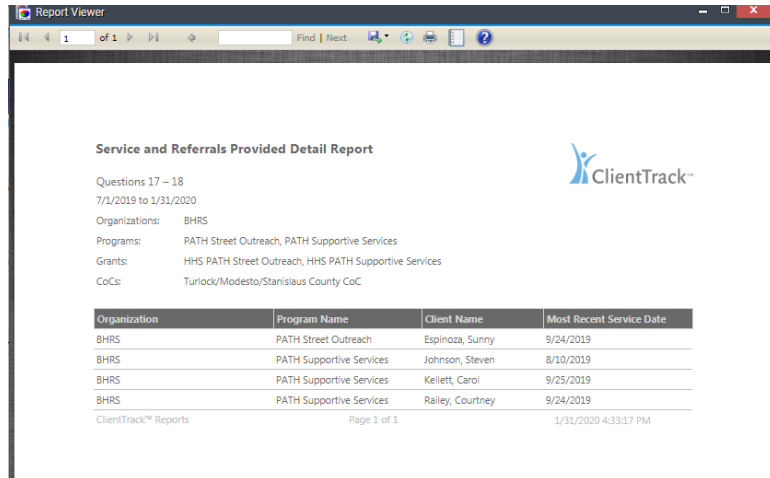
Program Name	Client Name	Project Entry Date	Date of PATH Determination	Project Exit Date	PATH Enrollment Status												
1	Organizat	ProgramN	ProgramT	CaseID	CaseNam	ClientID	ClientNan	BirthDate	Age	SSNQualit	Race_Amc	Race_Asia	Race_Blac	Race_Nati	Race_Whi	Race_Clie	Race_Clie
2	BHRS	PATH Stre	19581	Street out	8338	Ohmsford	10823	Ohmsford	Full DOB F	19	Full SSN	Yes	No	No	No	No	No
3	BHRS	PATH Stre	19581	Street out	8402	River, Joai	10852	River, Joai	Full DOB F	43	Full SSN	No	No	No	No	Yes	No
4	BHRS	PATH Stre	19581	Street out	8486	Swoop, Ai	10896	Swoop, Ai	Full DOB F	43	Full SSN	No	Yes	No	No	No	No
5	BHRS	PATH Stre	19581	Street out	8487	Dale, Chip	10897	Dale, Chip	Full DOB F	26	Full SSN	No	No	No	No	Yes	No
6	BHRS	PATH Stre	19581	Street out	8489	Adams, Je	10804	Adams, Je	Full DOB F	47	Full SSN	No	No	No	No	Yes	No
7	BHRS	PATH Stre	19581	Street out	8511	Dirk, Simc	10917	Dirk, Simc	Full DOB F	25	Full SSN	No	No	Yes	No	No	No
8	BHRS	PATH Stre	19581	Street out	8555	Smith, Joe	10646	Smith, Joe	Full DOB F	19	Full SSN	No	No	No	No	Yes	No

Service and Referrals Provided

The service and referrals provided detail report includes service/referral level details for client counted in questions 17-18.

Question 17: Services Provided

Type of Service	Number of people receiving service
17a. Reengagement	0
17b. Screening	0
17c. Clinical Assessment	0
17d. Habilitation/rehabilitation	0



A	B	C	D	E	F	G	H	I	J
Type	Organization	ProgramName	ProgramID	ClientID	Name	ServiceDate	Service	PATHServiceOrReferralType	Result
Service	BHRS	PATH Street Outreach	19581	11490	Espinoza, Sunny	9/24/2019	PATH HMIS Update Form	Case management	
Service	BHRS	PATH Supportive Services	19582	11477	Johnson, Steven	8/10/2019	Case Management	Case management	
Service	BHRS	PATH Supportive Services	19582	11465	Kellett, Carol	9/24/2019	Community Mental Health	Community mental health	
Service	BHRS	PATH Supportive Services	19582	11465	Kellett, Carol	9/25/2019	Community Mental Health	Community mental health	
Service	BHRS	PATH Supportive Services	19582	11492	Railey, Courtney	9/24/2019	Community Mental Health	Community mental health	

**Question 18: Referrals Provided**

Type of Referral	Number receiving each referral	Number who attained the service from the referral
Community Mental Health	0	0
Substance use treatment	0	0
Primary health/dental care	0	0
Job training	0	0

**PATH ANNUAL REPORT MANUAL**

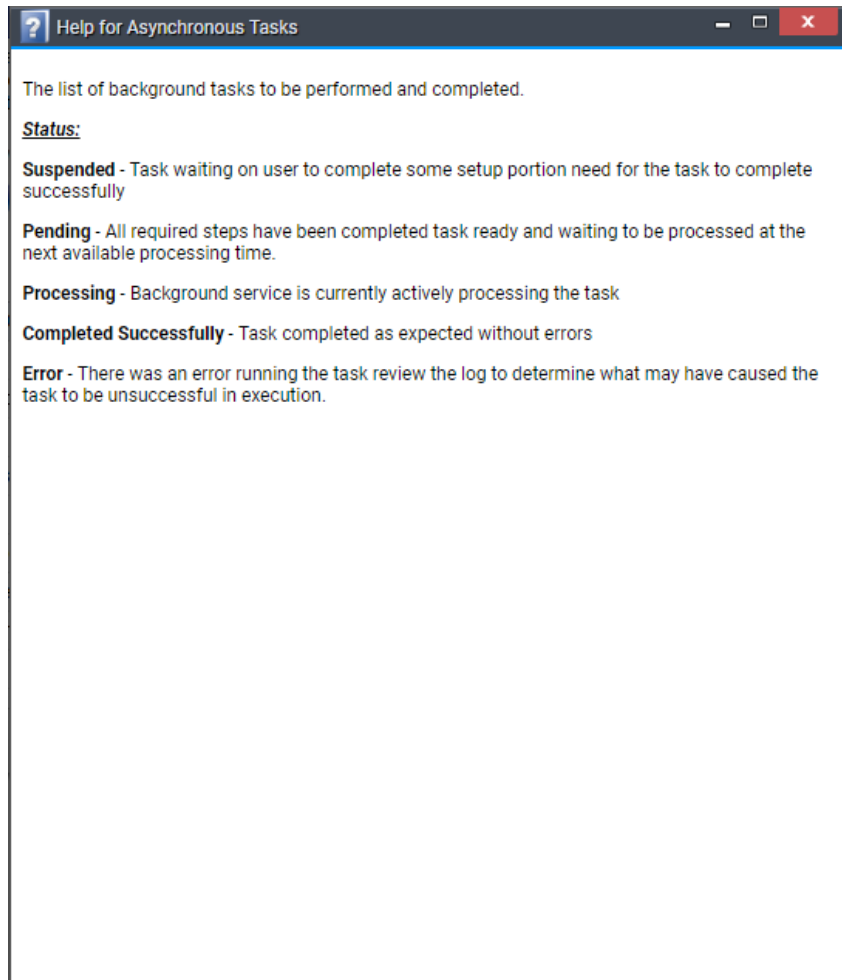
<https://files.hudexchange.info/resources/documents/PATH-Program-HMIS-Manual.pdf>

**HMIS Programming Specifications PATH ANNUAL Report**

<https://files.hudexchange.info/resources/documents/HMIS-Programming-Specifications-PATH-Annual-Report.pdf>



## Key to Asynchronous Tasks



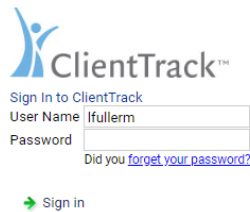
# CES Coordinated Access Data Entry

## Logging into ClientTrack

Turn off "Pop-up Blockers"



1. Passwords are case sensitive
2. Never let your Internet Browser store your login or Password
3. [www.clienttrack.net/modesto](http://www.clienttrack.net/modesto)
4. **Remember:** Sharing your User Name and password is NOT PERMITTED!



### What's New

NHSDC Oct 2019  
9/30/2019

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

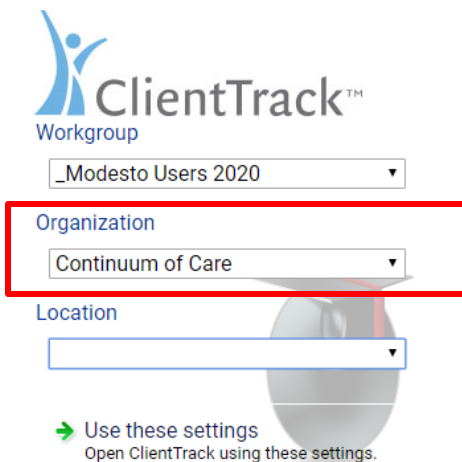
Florida Coalition for the Homeless  
9/30/2019

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

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

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

Visit [EccoviaSolutions.com](http://EccoviaSolutions.com) for more information.  
Copyright © 1983-2019 Eccovia Solutions - All Rights Reserved.



Make sure you are in Workgroup:

### Modesto Users 2020

You will have access to more than one organization. The menu will appear here under the **Organization** section. It is **critical** that you make sure to change to the correct organization: **Continuum of Care** when entering ALL of the CES Assessments into HMIS

**Note:** If any part of the Release of Information is not signed or initialed, DO NOT ENTER INTO HMIS. Please scan and send entire packet of paperwork to HMIS Admin Staff.

# Client Data Entry

## Finding/Adding Client

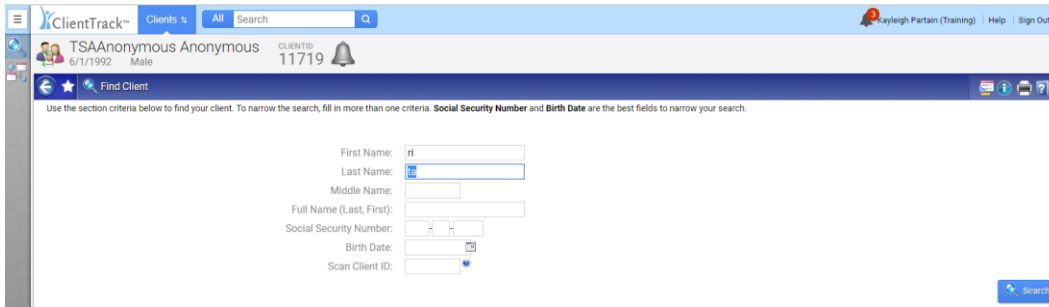
Make sure you have a signed HMIS ROI (Release of Information) from the Client

- #1. Make sure you are on the **Client Workspace** if you are ready to start entering a client into the system
- #2. Start by searching for Client, Click **Find Client**



When searching for a client; always remember “Less is best”

Use the first few letters of the first & last name to narrow the search, and then click




The system will give a list of names matching your search

- #1. If the correct name appears, highlight and click the correct name below or
- #2. If the correct name is not listed, start **Intake** using the icon on the top left to proceed with Coordinated Entry client intake workflow.

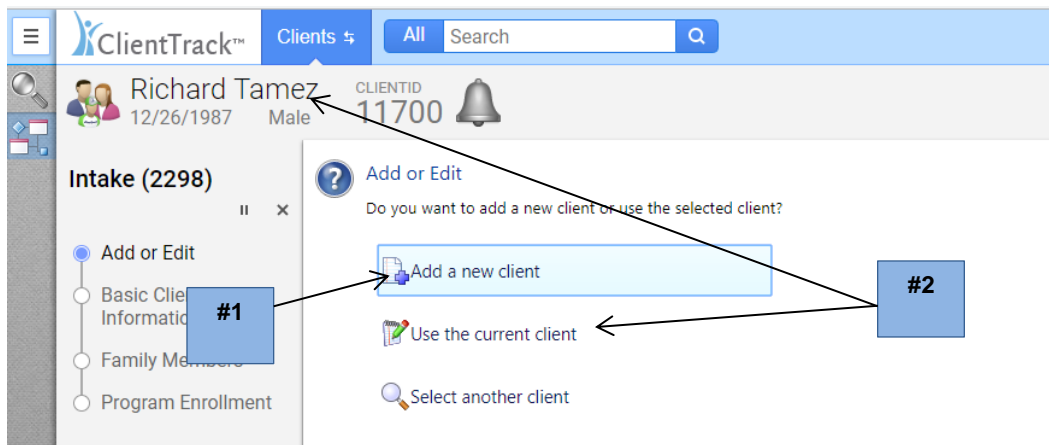


If client is in HMIS, make sure they are not already enrolled in the CES Coordinated Access Project



Active					
Services Only					
CES Coordinated Access	2	Household without Children	07/06/2020	9697	12287 30

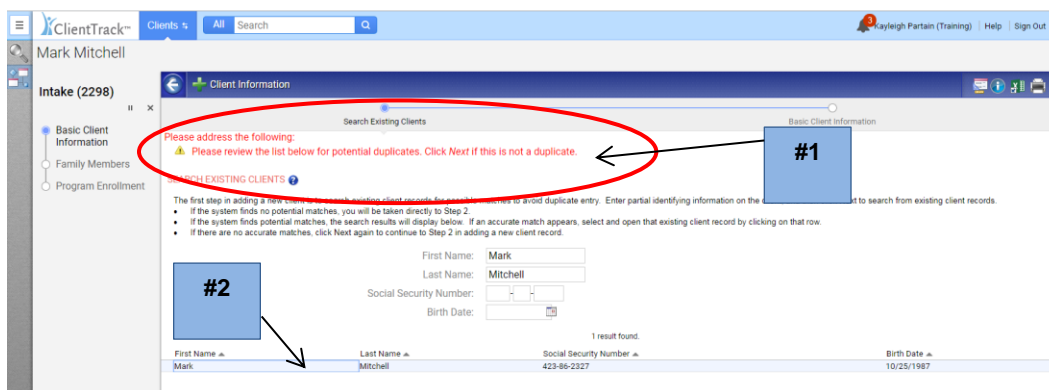
When you click on the , you will have the option to **Add a new client** or **Use the current client**

- #1. If the client is not found in the system through search, then click **Add a new client**
- #2. If the client was found through your search and you clicked on the name, they will appear in the header. Only click **Use the current client** if the client's name is showing in the header




If you choose **Add a new client**, the workflow will then begin by Searching Existing Clients

- #1. The system will let you know if any potential duplicates exist, verify new client and proceed by clicking 
- #2. If the correct client name does appear, click on the name that matches your Intake Packet to proceed, then click 

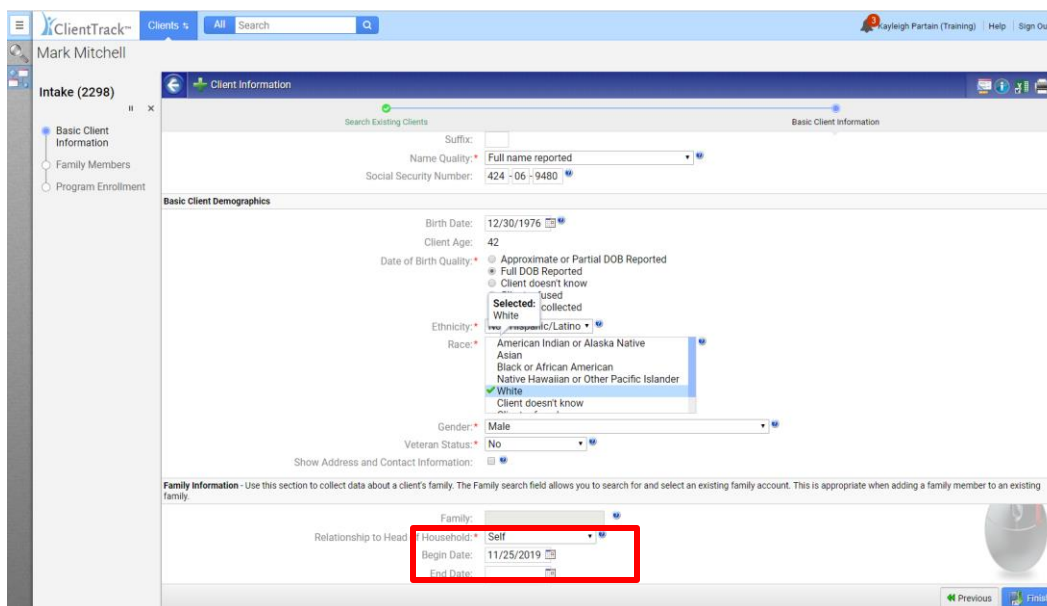


Starting at the top, complete all required fields. \*

Always make sure if you entered a partial SSN in the search to complete the entire SSN, DOB, etc. Once complete, Click 

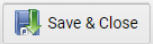
**DO NOT**, enter an invalid social security number such as 999-99-9999 or if unknown leave blank, do not add XXX-XX-XXXX. Select the data quality option that best reflects the client's response.

Once you get to the **Family Information** end of the **Basic Client Information** screen, you will **change the Begin Date to the Date of Enrollment found on the Intake Packet**. This will track the last signed ROI in HMIS.



The screenshot shows the 'Basic Client Information' screen for Mark Mitchell. The 'Family Information' section is highlighted with a red box, showing the 'Relationship to Head of Household' set to 'Self' and the 'Begin Date' set to '11/25/2019'. Other fields include Birth Date (12/30/1976), Client Age (42), Date of Birth Quality (Full DOB Reported), Ethnicity (White), Race (White), Gender (Male), and Veteran Status (No).


## Adding Family Members

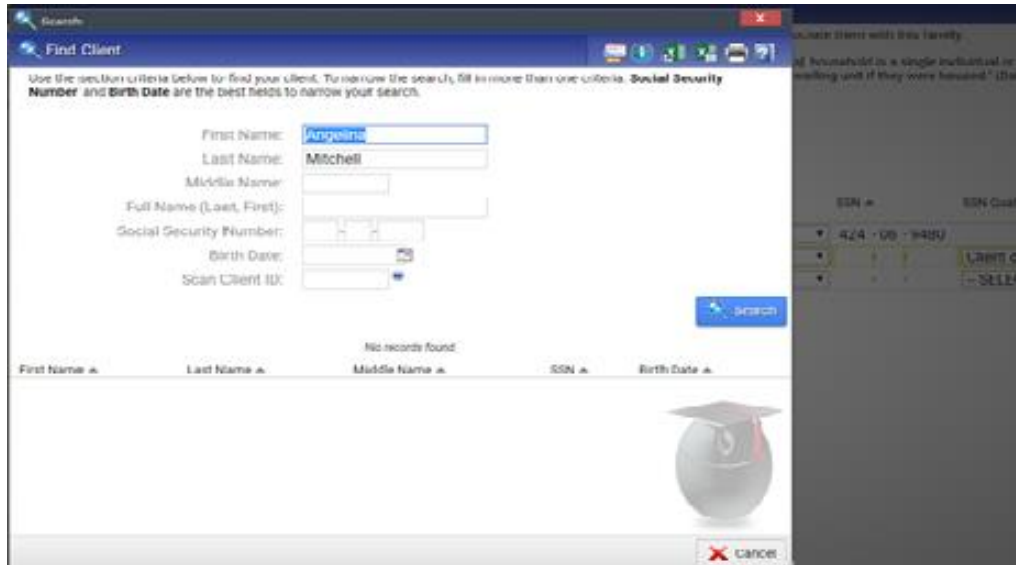
- #1. To add additional family members, Click on the box to add family member (only if additional family member is not already listed)
- #2. Making sure you then tab or scroll to the far right to complete all the fields. If you do not have any family members to add, click 



The screenshot shows the 'Family Members' screen for Mark Mitchell. A blue box labeled '#1' points to the '+' button to add a new family member. Another blue box labeled '#2' points to the 'Relationship to Head of Household' dropdown menu in the table below. The table contains one entry for Mark Mitchell with a relationship of 'Self'.

First Name	Middle Name	Last Name	Suffix	Name Quality	Birth Date	Age	Birth Date Quality	Gender	SSN	SSN Quality	Relationship to Head of Household
Mark	Edward	Mitchell		Full name reported	12/30/1976	42	Full DOB Reported	Male	424 - 06 - 9480		Self

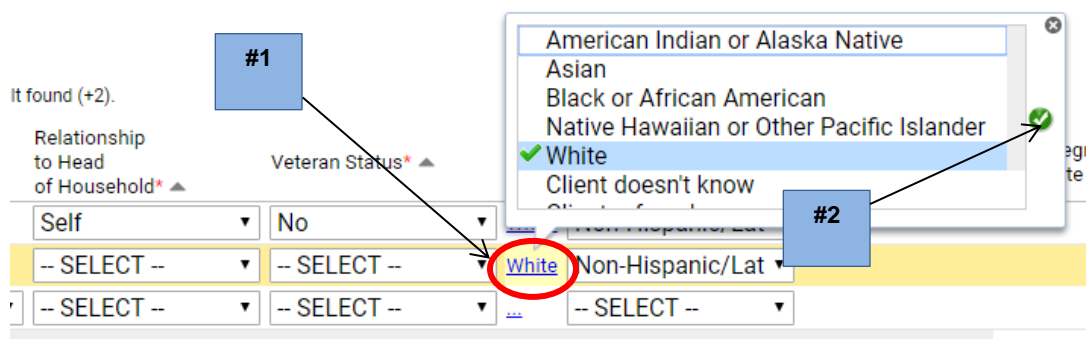
The system will automatically conduct a search for the new household member after you enter the first and last name. If the new household member is already in the system, click on the appropriate name in the search list that appears in the new window to attach the existing client record to the household.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



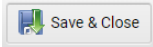
Pay close attention to the **Race** and **Ethnicity** fields when adding household members. They will default to the Head of Household selections. If you need to change the **Race**

**#1** click on the blue hyperlink and make necessary changes and

**#2** click on the green circle with the check mark

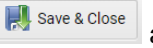


#1. If you are alerted to an error after selecting



#2. Scroll all the way to the right and hover over the red circle with an exclamation point. Go

back and address the issues then choose



Please address the following:  
There is 1 row in the result set that requires attention

The selected client's family members are displayed below. You may search for existing clients to add new clients to the 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's household. According to HUD "[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)." (Data Manual)

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

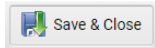
1 result found (+2)

Age	Birth Date Quality	Gender	SSN	SSN Quality	Relationship to Head of Household	Veteran Status	Race	Ethnicity
2	Full DOB Reported	Male	424 - 06 - 9480		Self	No	White	Non-Hispanic/Lat
0	Full DOB Reported	Female	255 - 63 - 7096		-- SELECT --	-- SELECT --	White	Non-Hispanic/Lat
N/A	-- SELECT --	-- SELECT --	-- SELECT --	-- SELECT --	-- SELECT --	-- SELECT --	-- SELECT --	-- SELECT --

Callout #2 points to a red circle with an exclamation point on the table.



**Save:** Will save the changes made to the screen and leave you on the same screen



**Save & Close:** Will save the changes made to the screen and move to the next page.

## Project Enrollment

Projects vary in their data requirements and ClientTrack will prompt you through the workflow to collect all of the required HUD (or other Partner agency) data elements for your specific project. Please note that all fields marked 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

Click on the down arrow to choose the Program you wish to enroll the client in

Information provided by the client or their care provider indicates they meet the criteria for admission (for example, chronic homelessness) or requires the client indicates they have a serious disability and have been homeless long enough to qualify. Through all other means, please note that basic housing method.

Only projects with a valid HMIS Project Type appear here.

Due to the large number of conditional data collection elements it is not possible to change a project once the enrollment record has been created.

While creating the enrollment you will see the project field disabled when household members are selected. The project field can be changed when no household members are selected.

Project\* -- SELECT --

You will only see the options in the drop-down list that your organization has access to or what Programs they are set up for. If you do not find your Program option when enrolling the client

PLEASE DO NOT CONTINUE. Cancel your workflow by clicking the

**Contact your HMIS System Administrator (209) 558-3676**

## #1 Choose CES Coordinated Access for your Project.


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 into the project, the client indicates the following factors have been met:
  - 1) Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify – though all documentation may not yet have been gathered;
  - 2) The client has indicated they want to be housed in this project;
  - 3) The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time.
- for all other types of **Service projects including but not limited to:** services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

Project: \*  **CES Coordinated Access**

- #1. Click on the box to the left of all persons you want to enroll in this program
- #2. The **Project Start Date** will default to the date of entry, so change if needed by clicking on

the date. Then click 

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.
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Project: \*

**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
<input checked="" type="checkbox"/>	Mitchell, Mark Edward	Male	42	11/25/2019	Kayleigh Partain	Self
<input type="checkbox"/>	Mitchell, Angelina	Female	40			--SELECT--

## Universal Data Assessment

Complete all fields. You can no longer change the type of assessment or program, so if it is showing incorrect, you are not in the correct workflow.

Master Assessment Active Change Assessment Date

Default Client's Last Assessment

Universal Data Assessment \* Information Date: 09/20/2017

Age at Assessment: 20

Assessment Type: Entry

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: CA-510 - Turlock/Modesto/Stanislaus County CoC

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

Type of Residence: Staying or living in a family member's room, apartment or house

Did you stay less than 7 nights? No

Length of stay in the prior living situation: One month or more, but less than 90 days

**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:

Save No Chan



## Living Situations

Enter **Prior Living Situation** and **Length of stay** in the Living Situation section. **Note:** Living situations are Conditional Questions

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

Type of Residence: \* Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside) (16)

Length of stay in the prior living situation: \* One night or less


Approximate date homelessness started: \* 03/01/2017

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: \* One time

Total number of months homeless on the street, in ES, or SH in the past three years: \* One month (this time is the first month)

## Health Insurance

**#1.** If you mark yes to **Covered by Health Insurance**, you must have an answer on all in the status field. Click the box in the top left to select all. This will mark No on all options.

**#2.** Change the one (or multiple if covered by 2 or more insurances such as Medicare and Medicaid) that should say Yes and then click 

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

Covered by Health Insurance: \* Yes

Type	Status	Reason No	Other Coverage
<input checked="" type="checkbox"/> Private Pay Health Insurance	No	-- SELECT --	
Medicare	No	-- SELECT --	
Medicaid	No	-- SELECT --	
State Children's Health Insurance Program S-CHIP	No	-- SELECT --	
Veteran's Administration (VA) Medical Services	No	-- SELECT --	
Employer-Provided Health	No	-- SELECT --	
Health insurance obtained through COBRA	No	-- SELECT --	
Other Public	No	-- SELECT --	
State Funded Insurance for Adults (Medical)	Yes	-- SELECT --	
Combined Children's Health Insurance / Medicaid Program	No	-- SELECT --	
Indian Health Service (IHS)	No	-- SELECT --	
Other	No	-- SELECT --	
No insurance	No	-- SELECT --	

## Self-Sufficiency Matrix

Pay close attention to this screen. It will ask if you want to **SKIP** the step of filling in the Matrix. If you have a Self-Sufficiency Matrix that has been filled out, you want to select NO and proceed to answering the questions.

Mark Mitchell 12/30/1976 Male CLIENTID 11758

Intake (2298)

- Basic Client Information
- Family Members
- Program Enrollment
- Mark Mitchell

Would you like to skip this step?

Would you like to skip this the Self Sufficiency Evaluation step?

Yes

No

Intake (2298) Universal Data Assessment Self-Sufficiency Matrix

Rate the client's level of self-sufficiency at the assessment point-in-time on a scale of 1 to 5 in each domain below based on the descriptions provided. Select "Not Applicable" if a domain is not applicable for the client.

Default Client's Last Assessment

Assessment Active

Assessment Date: 11/25/2019  
 Assessment Type: Entry  
 Comments:

Income:
 

- 1 - No Income
- 2 - Inadequate income and/or spontaneous or inappropriate spending
- 3 - Can meet basic needs with subsidy; appropriate spending
- 4 - Can meet basic needs and manage debt without assistance
- 5 - Income is sufficient, well managed, has discretionary income and is able to save

Employment:
 

- 1 - No Job
- 2 - Temporary, part-time or seasonal; inadequate pay; no benefits
- 3 - Employed full-time; inadequate pay; few or no benefits
- 4 - Employed full-time with adequate pay and benefits
- 5 - Maintains permanent employment with adequate income and benefits

Housing:
 

- 1 - Homeless or threatened with eviction
- 2 - In transitional, temporary or substandard housing; and/or current rent/mortgage is unaffordable
- 3 - In stable housing that is safe but only marginally adequate
- 4 - Household is safe, adequate, subsidized housing
- 5 - Household is safe, adequate, unsubsidized housing

Food:
 

- 1 - No food or means to prepare it. Relies to a significant degree on other sources of free or low-cost food.
- 2 - Household is on food stamps
- 3 - Can meet basic food needs but requires occasional assistance
- 4 - Can meet basic food needs without assistance
- 5 - Can choose to purchase any food household desires

Matrix Score Summary - The Matrix Score calculates the average of all domain scores between 1 and 5, excluding domains where Not Applicable is selected.

Matrix Score: 2.28

Save

**HMIS system will calculate the total automatically.**

**#1** If you answer **Yes** you want to skip the Matrix, then proceed to the VI SPDAT

Mark Mitchell 12/30/1976 Male CLIENTID 11758

Intake (2298)

Would you like to skip this step?  
 Would you like to skip this the Self Sufficiency Evaluation step?

Yes

No

#1

**VI SPDAT**

**#1** Make sure you choose the correct VI SPDAT that you will be entering

Mark Mitchell 12/30/1976 Male CLIENTID 11758

Intake (2298)

Which Vulnerability Index for this client?  
 Which Vulnerability Index for this client?

VI-SPDAT - Single

VI-SPDAT - Family

TAY-SPDAT - Youth

No SPDAT at this time, continue

#1

Change the **Interviewer Name** and the **Date/Time** as it default to the data entry staff and date and time of the entry. Fill in all of the information that appears in the Intake packet.

Mark Mitchell 12/30/1976 Male CLIENTID 11758

Universal Data Assessment | Self-Sufficiency Matrix | 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 Licensor. 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 Org Consulting, Inc.

Assessment Active

Administration

Interviewer Name: **Kayleigh Partain** Agency:  Team  Staff  Volunteer

Date/Time: \* 12/17/2019 06:24 PM Interview Location:

Basic Information

Name: Mitchell, Mark Edward

Nickname:

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

Age at Assessment: 42 Birthdate: 12/30/1976 Soc Sec No: 424-06-9480

Has Consented to Participate?  No  Yes

**SCORING SECTION**

SECTION	SCORE	Results
PRE-SURVEY	0	<b>Score Recommendation</b>
A. HISTORY OF HOUSING & HOMELESSNESS	0	0-3 No housing intervention
B. RISK	3	4-7 An assessment for Rapid Re-Housing
C. SOCIALIZATION & DAILY FUNCTIONS	2	8+ An assessment for Permanent Supportive Housing/Housing First
D. WELLNESS	4	
<b>Grand Total</b>	<b>9</b>	

**#1** HMIS will automatically calculate the score based on the answers entered. When finished,

click 

**Follow-Up Questions**

On a regular day, where is it easiest to find you and what time of day is easiest to do so?


When?  Mornings  Afternoon  Evening  Night


Is there a phone number and/or email where someone can get in touch with you or leave a message?

Phone:

Email:

Photo Permission:  No  Yes  Refused

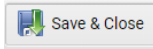




## Barriers Assessment

#1. If a client does not have any barriers, click the box on the top left, which marks them all as

No, and click



#2. If a client does have barriers, after clicking the box, change the answers on the appropriate barriers

**Important:** If a client has a barrier that is Indefinite, they must have the Disabling Condition marked “yes” as HMIS will automatically change.

**Note:** The drop-down for Indefinite does not show up for **Developmental Disability** and **HIV/AIDS** as they have been determined as automatically Indefinite per the HMIS Data Standards.

The screenshot shows the 'Barriers' assessment form. A blue box labeled '#1' points to a checkbox in the top left corner of the barrier list. A blue box labeled '#2' points to the 'Disabling Condition' dropdown menu for the 'Mental Illness' barrier, which is currently set to 'Yes'. A red box highlights the 'Mental Illness' row, and another red box highlights the 'Disabling Condition' dropdown for that row.

Barrier	Barrier Present?	Condition is Indefinite	Explanation	Previous Barrier Details
Alcohol Abuse	No			
Chronic Health Condition	Yes	Yes		
Developmental Disability	No			
Drug Abuse	No			
HIV/AIDS				
Mental Illness	Yes	Yes		
Physical Disability	No			

## Domestic Violence

Assessment Active

Assessment Date: 11/25/2019

Domestic Violence Experience:  Yes  
 No  
 Client doesn't know  
 Client refused  
 Data Not Collected

When Experience Occurred: Within the past three months

Currently Fleeing: Yes

# Financial Assessment (Income Sources and Non-Cash Benefits)

Complete Income and Non-Cash Benefits on all Adults. All children income will go under the HOH Income information. You will not complete a separate Financial Assessment for children in the household.

- #1. If you mark **Yes**, then select the appropriate income **Type** and enter the amount received rounded to the nearest dollar.
- #2. Make a note in the **Description** if the income comes from a child in order to track changes.
- #3. Scroll down to the **Non-Cash Benefits**, if you marked **Yes**, and enter the amount after selecting the **Type**.
- #4. Once finished select **Save and Close**
- #5. **NEVER** mark Yes for Income from Any Source and then **NO FINANCIAL RESOURCES**

Type	Description	Monthly Amount
<input type="checkbox"/> Earned Income		
<input type="checkbox"/> Unemployment Insurance		
<input checked="" type="checkbox"/> Supplemental Security Income	Sam \$600.00	\$600.00
<input type="checkbox"/> Social Security Disability Income		
<input type="checkbox"/> Private Disability Insurance		
<input type="checkbox"/> Worker's Compensation		
<input type="checkbox"/> VA Service-Connected Disability Compensation		
<input type="checkbox"/> VA Non-Service-Connected Disability Pension		
<input type="checkbox"/> Pension or retirement income from a previous job		
<input checked="" type="checkbox"/> TANF		\$400.00
<input type="checkbox"/> General Assistance		
<input type="checkbox"/> Retirement (Social Security)		
<input type="checkbox"/> Child Support		
<input type="checkbox"/> Alimony		
<input type="checkbox"/> Other Income		
<input type="checkbox"/> No Financial Resources		

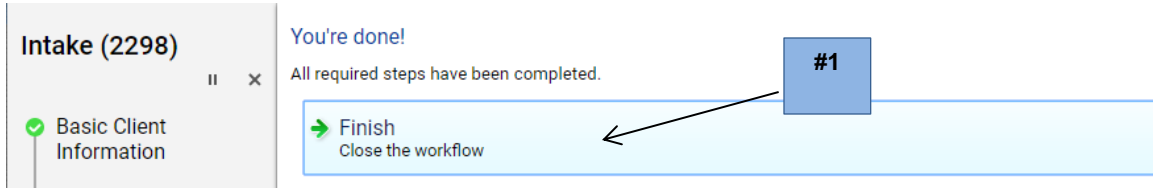
  

Type	Description	Monthly Amount
<input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants, and Children		
<input checked="" type="checkbox"/> Supplemental Nutrition Assistance Program (SNAP)		\$200.00
<input type="checkbox"/> TANF Child Care Services		
<input type="checkbox"/> TANF Transportation Services		
<input type="checkbox"/> Other TANF-funded Services		
<input type="checkbox"/> Other Source		
<input type="checkbox"/> Section 8, Public Housing, or Other Rental Assistance <sup>1</sup>		
<input type="checkbox"/> Temporary rental assistance <sup>1</sup>		

<sup>1</sup> Deprecated in 2017 (HMIS v6.1)

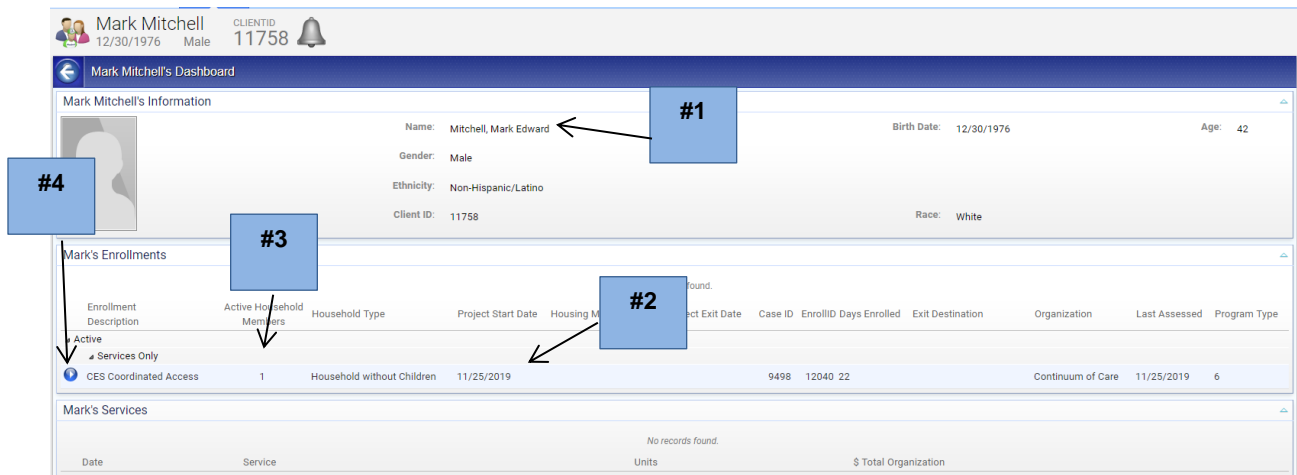
## Completing Intake Workflow

#1 Make sure to click **Finish: Close the workflow** to complete the Workflow

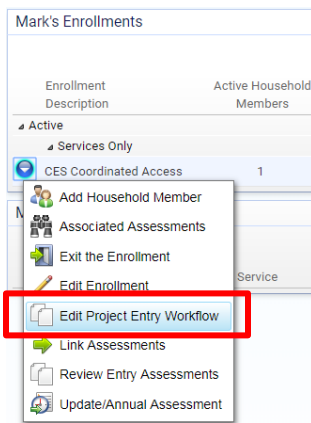


**Always double check the Client's Dashboard when you complete the Workflow for accuracy**

- #1. Correct spelling of **Name** and correct **Demographical Information**
- #2. Correct **Project Start Date**
- #3. Correct number of **Active Household Members**
- #4. Correct **Program**



## Entering VI-SPDAT or Self-Sufficiency Matrix after HMIS Enrollment is Complete



From the **Client Dashboard**, click on the blue action arrow on the **CES Coordinated Access** enrollment and select **Edit Project Entry Workflow**

Go through the entire workflow, marking  or  until you come to the **Self-Sufficiency Matrix**. It will ask if you would like to skip the assessment. Click **No**, even if you have already completed it. It will bring up the Matrix already filled in with the answers you chose. If there are no changes, select . If there are changes, make those changes and select .

**Always remember when doing this process, go completely through the entire workflow and through all assessments and end back at the Client Dashboard!**

**Mark Mitchell's Information**

Name:	Mitchell, Mark Edward	Birth Date:	12/30/1976	Age:	42
Gender:	Male	Ethnicity:	Non-Hispanic/Latino	Client ID:	11758
		Race:	White		

**Mark's Enrollments**

1 result found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Services Only												
• CES Coordinated Access	1	Household without Children	11/25/2019			9498	12040	22		Continuum of Care	11/25/2019	6


## What is Viewable Through the Coordinated Access Enrollment?

**Clients**

- Find Client
- Intake

**CASE MANAGEMENT**

- Client Dashboard
- Edit Client
- Living Situation
- Enrollments
- Assessments
- Case Notes
- Referrals
- Family Members
- Services
- Veteran Information
- COORDINATED ACCESS**

In the Client Workspace, under the **Menu** tab  there is a **Navigation Menu** option **Coordinated Access**. You will see this on all clients in HMIS.

If the client is enrolled in a CES Coordinated Access Project, you will have access to the following data, as shown in the menu when you select **Coordinated Access**.

- COORDINATED ACCESS**
- CE Assessments
- CE Barriers
- CE Domestic Violence
- CE Enrollments
- CE Financial
- CE Housing Assessment Disposition at Exit
- CE Release of Information
- CE Self Sufficiency Matrix
- CE VI SPDAT
- CE TAY-VI-SPDAT
- CE Universal Data

## CE Assessments

It will show two Assessments: **Entry** and **Other**, which is the VI SPDAT (verify both are showing)

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

2 results found.

Date	Program	Type	Assessor	Comments	AssessID
11/25/2019 9:30AM	CES Coordinated Access	Other	Kayleigh Partain		12960
11/25/2019	CES Coordinated Access	Entry	Kayleigh Partain		12959

## CE Barriers

Barriers/Presenting Issues

The client's history of identified barriers or presenting issues displays below. To record a new barrier, click **Add New**. To record multiple new barriers, click **Quick Barriers**. To view or edit an existing barrier, click **Edit** next to the record.

7 results found.

Barrier Present? ▲	Date Assessed ▼	Date Resolved ▲	Organization ▲
Alcohol Abuse			
No	11/25/2019		Continuum of Care
Chronic Health Condition			
Yes	11/25/2019		Continuum of Care
Developmental Disability			
No	11/25/2019		Continuum of Care
Drug Abuse			
No	11/25/2019		Continuum of Care
HIV/AIDS			
Yes	11/25/2019		Continuum of Care
Mental Illness			
Yes	11/25/2019		Continuum of Care
Physical Disability			
No	11/25/2019		Continuum of Care

## CE Domestic Violence

Domestic Violence Assessments

The client's domestic violence assessment history displays below. To create a new domestic violence assessment at entry for HMIS, click **Add New**. To edit an existing assessment, click **Edit** next to the record.

1 result found.

Assessment Date ▼	Experienced Domestic Violence ▲
11/25/2019	Yes

When you click on the binoculars  you will view the actual assessment.

Domestic Violence Assessments ▶ 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.

Assessment:

Date	Program	Type	User
11/25/2019	CES Coordinated Access	Entry	Kayleigh Partain

Assessment Date: \* 11/25/2019  
 Domestic Violence Experience: \* Yes  
 When Experience Occurred: \* Within the past three months  
 Currently Fleeing: \* Yes

## CE Enrollments


Enrollments

All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a client in a program, exit them from an existing program or perform annual assessment up

1 result found.

Enrollment Description ▲	Case Members ▲	Project Start Date ▼	Housing Move-In Date ▲	Exit Date ▼	Exit Destination ▲	Organization ▲
Current						
CES Coordinated Access	1	11/25/2019				Continuum of Care



When you click on the binoculars  you will view the Enrollment Case Members

CES Coordinated Access > Enrollment Case Members

The Case Members display below. To view or add the household application select the edit button on the left hand side of the member you would like to edit.

1 result found.

Case Member	Grant	Relationship	Enroll Date	Exit Date
Mitchell, Mark Edward		Self	11/25/2019	

## CE Financial Assessment


Financial Assessments

Below is a list of the client's previous financial assessments. To create a new financial assessment, click **Add New Financial Assessment**. To edit an existing assessment, click **Edit Income** or **Edit Expenses** next to the record.

Family Summary				
Income	Family Income	Family Members	Poverty Level	% of Poverty
\$792.00	\$792.00	2	\$1,409.17	56.20 %

1 result found.

Date	Monthly Total Cash Income	Monthly Total Income (All Sources)	Monthly Expenses	Monthly Budget
11/25/2019	\$792.00	\$792.00	\$0.00	\$792.00

When you click on the binoculars  you will view the actual Income Assessment

Assessment:

Date	Program	Type	User
11/25/2019	CES Coordinated Access	Entry	Kayleigh Partain

Assessment Date: 11/25/2019  
 Income from Any Source: Yes  
 Non-Cash Benefits from Any Source: Yes  
 Expenses:

Income

Type	Description	Monthly Amount
Earned Income		\$600.00

## CE Housing Assessment Disposition at Exit

Housing Assessments

1 result found.


Assessment Date	Disposition
08/06/2019	Referred to rapid re-housing

## CE Release of Information

Mark Mitchell  
 12/30/1976 Male CLIENTID 11758

Client Files

Documents or other files may be stored electronically by uploading them here.

Preview	Document Name	File Type	Created Date
	ROI	Releas of Information	12/18/2019 12:06PM

When you click on the blue action arrow it will open the scanned Client Consent

## Stanislaus County HMIS Client Informed Consent and Release of Information

The Stanislaus County Homeless Management Information System (HMIS) is a shared database and software application which confidentially collects, uses, and shares client-level information related to homelessness in Stanislaus County. On behalf of the Turlock/Modesto/Stanislaus County Continuum of Care ("CoC"), HMIS is administered by the City of Modesto (City) and Stanislaus' HMIS Vendor, Eccovia Solutions/ClientTrack. Clients must consent to the collection, use, and release of their information, which helps the CoC's homeless service providers provide quality housing and services to homeless and low-income people.

Client information is collected in HMIS and released to housing and homeless service providers (each, a "Partner Agency," and collectively, the "Partner Agencies"), which includes community-based organizations, non-profit organizations and government agencies. Partner Agencies use the information in HMIS: to improve housing and services quality; to identify patterns and monitor trends over time; to conduct needs assessments and prioritize services for certain homeless and low-income subpopulations; to enhance inter-agency coordination; and to monitor and report on the delivery, impact, and quality of housing and services.

Client information is protected by limiting access rights to the database and by limiting the parties to whom the confidential information may be released, in compliance with federal, state, and local regulations governing the confidentiality of client records. Each person or agency with access rights to HMIS, or to whom client information is released, must sign an agreement to maintain the security and confidentiality of client information. Upon any violation of the agreement, access rights may be terminated, and the person or agency found to be in violation of the agreement may be subject to further penalties.

## CE Self Sufficiency Matrix

★ Self-Sufficiency Matrix Assessments

Below is a list of the client's self-sufficiency matrix assessments. To complete a new matrix, click **Add New Self-Sufficiency Matrix**. To edit an existing matrix, click **Edit** next to the record.

1 result found.

	Date	Type	Score	Comments
	11/25/2019	Entry	2.28	

When you click on the binoculars you will view the actual Self-Sufficiency Matrix Assessment

★ Self-Sufficiency Matrix Assessments | Self-Sufficiency Matrix

Rate the client's level of self-sufficiency at the assessment point-in-time on a scale of 1 to 5 in each domain below based on the descriptions provided. Select "Not Applicable" if a domain is not applicable for the client.

Assessment:

Date	Program	Type	User
11/25/2019	CES Coordinated Access	Entry	Kayleigh Partain

Assessment Date:\* 11/25/2019  
 Assessment Type:\* Entry  
 Comments:

Income:\* 2 - Inadequate income and/or spontaneous or inappropriate spending

Employment:\* 2 - Temporary, part-time or seasonal; inadequate pay; no benefits

Housing:\* 1 - Homeless or threatened with eviction

Food:\* 2 - Household is on food stamps

Childcare:\* 6 - N/A

Children's Education:\* 6 - N/A

Adult Education:\* 3 - Has high school diploma/GED

Legal:\* 4 - Has successfully completed probation/parole within past 12 months; no new charges filed; recently resolved other legal issues.

Health Care:\* 3 - Some members (e.g. Children) on Medicaid or other state-sponsored health insurance program.

Life Skills:\* 3 - Can meet most but not all daily living needs without assistance

Mental Health:\* 3 - Mild symptoms may be present but are transient; only moderate difficulty in functioning due to mental health problems

Substance Abuse:\* 5 - No drug use/alcohol abuse in last 6 months

Family Relations:\* 1 - Lack of necessary support from family or friends; abuse (DV, child) is present or there is child neglect

Mobility:\* 2 - Transportation is available but unreliable, unpredictable, unaffordable; may have car but no insurance, license, etc.

Community Involvement:\* 1 - Not applicable due to crisis situation; in "survival" mode

Safety:\* 3 - Current level of safety is minimally adequate; ongoing safety planning is essential

Parenting Skills:\* 3 - Parenting skills are apparent but not adequate

Credit History:\* Outstanding judgments or bankruptcy/foreclosure

**Matrix Score Summary:** The Matrix Score calculates the average of all domain scores between 1 and 5, excluding domains where Not Applicable is selected.

Matrix Score: 2.28  
New Field:

## CE VI SPDAT


VI-SPDAT/F-VI-SPDAT History

All Vulnerability Index Service Prioritization Decision Assistance Tool (VI-SPDAT/Family(F)-VI-SPDAT) Assessments for the selected client are displayed below.

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1 result found:

Assessment ID	Type	Vulnerability Index Assessment Date	Score General	Score Family	Score History	Score Risks	Score Socialization	Score Wellness	Score Total
12960	Single Adults	11/25/2019 9:30AM	0	0	0	3	2	4	9

When you click on the binoculars  you will view the actual VI SPDAT Assessment

VI-SPDAT/F-VI-SPDAT History > 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 Licensor. 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 Org Consulting, Inc.

**Administration**

Interviewer Name: **Kayleigh Partain** Agency: **Staff**  
 Date/Time: **11/25/2019 9:30:00 AM** Interview Location: **OEC**

**Basic Information**

Name: **Mitchell, Mark Edward**  
 Nickname:  
 In what language do you feel best able to express yourself? **English** Soc Sec No: **424-06-9480**  
 Age at Assessment: **42** Birthdate: **12/30/1976** Has Consented to Participate? **Yes**

**SCORE:**  
**0**

**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): **Shelter**

## CE Universal Data

Universal Data Assessments

Below is a list of the client's history of universal data elements. To create a new record, click **Add New Universal Data Assessment**. To edit an existing record, click **Edit**. Please note that in most cases you will want to add new or edit using the HMIS workflows.

2 results found:

Date	Program Name	Assessment Type	Housing Status	Prior Residence	Length of Stay
11/25/2019 9:30AM	CES Coordinated Access	Other			
11/25/2019	CES Coordinated Access	Entry	Emergency shelter, including hotel or motel paid for with emergency shelter voucher, or RHY-funded Host Home shelter		One month or more, but less than 90 days

When you click on the binoculars  you will view the actual Universal Data Assessment

Universal Data Assessments > 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 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

**Assessment:**

Date	Program	Type	User
11/25/2019	CES Coordinated Access	Entry	Kayleigh Partain

Assessment Date: **11/25/2019**  
 Age while in project: **42**  
 Assessment Type: **Entry**  
 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: **CA-510 - Turlock/Modesto/St Stanislaus County CoC**

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

Type of Residence: **Emergency shelter, including hotel or motel paid for with emergency shelter voucher, or RHY-funded Host Home shelter**  
 Length of stay in the prior living situation: **3**  
 Approximate date homelessness started: **9/1/2019**  
 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: **One time**  
 Total number of months homeless on the streets, in ES, or SH in the past three years: **2**

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

If the client is not enrolled in the CES Coordinated Access Project you will only see the following

## Previous Enrollments

Enrollments

All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a client in a program, exit them from an existing program or perform annual assessment updates.

1 result found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization
FP STAN HP	3	06/17/2019				Family Promise

All other CE Assessments will be blank

## CE Domestic Violence (Not Enrolled)

Domestic Violence Assessments

The client's domestic violence assessment history displays below. To create a new domestic violence assessment at entry for HMIS, click **Add New**. To edit an existing assessment, click **Edit** next to the record.

No records found.

Assessment Date	Experienced Domestic Violence
-----------------	-------------------------------

## CE Master Assessments (Not Enrolled)

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.

No records found.

Date	Program	Type	Assessor	Comments
------	---------	------	----------	----------

## CE Barriers (Not Enrolled)

Barriers/Presenting Issues

The client's history of identified barriers or presenting issues displays below. To record a new barrier, click **Add New**. To record multiple new barriers, click **Quick Barriers**. To view or edit an existing barrier, click **Edit** next to the record.

No records found.

Barrier Present?	Date Assessed	Date Resolved	Organization
------------------	---------------	---------------	--------------

## CE Financial

Financial Assessments

Below is a list of the client's previous financial assessments. To create a new financial assessment, click **Add New Financial Assessment**. To edit an existing assessment, click **Edit Income** or **Edit Expenses** next to the record.

Family Summary

No Recent Income
Family Members 3
Poverty Level \$1,777.50

No records found.

Date	Monthly Total Cash Income	Monthly Total Income (All Sources)	Monthly Expenses	Monthly Budget
------	---------------------------	------------------------------------	------------------	----------------

## CE Self Sufficiency Matrix

Self-Sufficiency Matrix Assessments

Below is a list of the client's self-sufficiency matrix assessments. To complete a new matrix, click **Add New Self-Sufficiency Matrix**. To edit an existing matrix, click **Edit** next to the record.

No records found.

Date	Type	Score	Comments
------	------	-------	----------

## CE VI SPDAT

## CE Universal Data

## Logged into the Wrong Agency for CES Coordinated Access

**Example:** Logged in as Organization: **Center for Human Services**

The CES Coordinated Access Enrollment will not be visible on the Client Dashboard

You are still able to view all of the CE Assessments through the Navigation Menu, Coordinated Access Tab

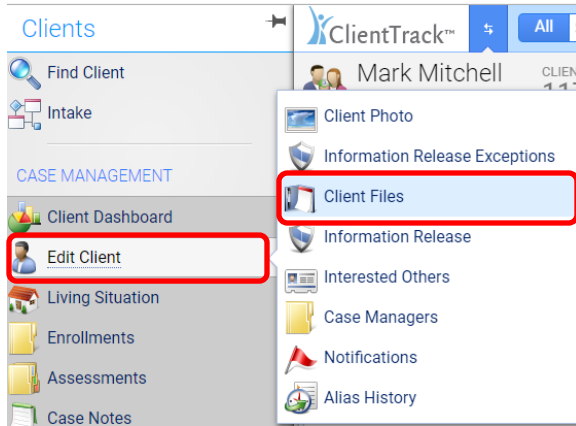
**Example:** Logged in as Organization: **Continuum of Care**

The CES Coordinated Access Enrollment is visible on the Client Dashboard

You are able to view CE Assessments as above

# How to Scan the Release of Information and VI SPDAT Into HMIS

You must be logged into HMIS under Organization: **Continuum of Care**

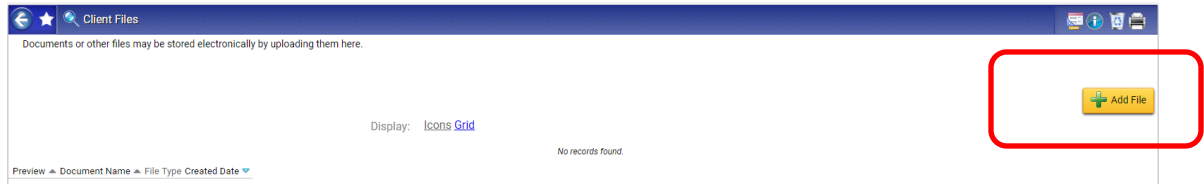


From the **Client Workspace**, open the **Navigation Menu**, select **Case Management**, hover mouse over **Edit Client** which will bring up side menu and select **Client Files** from that menu.

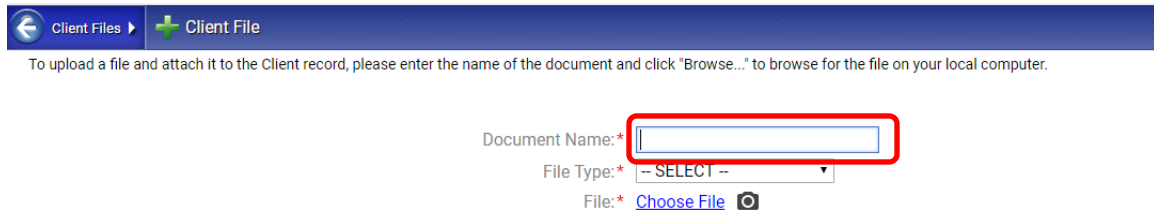
If Family VISPDAT, **upload to HOH ONLY**

**Note:** Do NOT click on **Edit Client** as that will take you to the Client Information screen to edit demographic information.

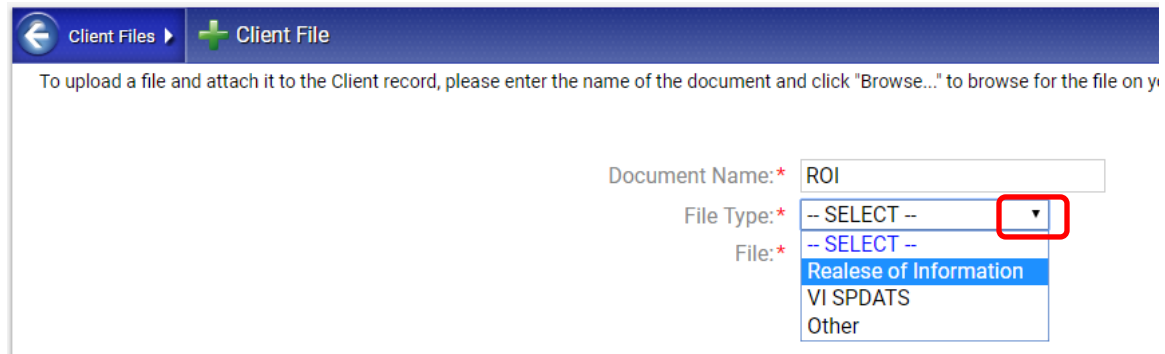
## #1 Click Add New



## #2 Name Document: Release of Information (ROI) or VI SPDAT



## #3 Select Appropriate File Type from drop down



#### #4 Choose File

Client Files | Client File

To upload a file and attach it to the Client record, please enter the name of the document and click "Browse..." to browse for the file on your local computer.

Document Name:\* ROI

File Type:\* Realese of Information

File:\* **Choose File**

You will have to scan the document and save on your desktop or in a file on your computer but once you have uploaded it, **YOU MUST DELETE the document, DO NOT KEEP it on your computer!**

#1. If you chose the wrong file

#2. Click on the red X to remove and upload again

Document Name:\* ROI

File Type:\* Realese of Information

File:\*

#1


#2

**HMIS Self-Sufficiency Matrix 07022019.pdf**

As soon as you click the X, your Files will show and you can click on the correct file and hit Open

Folder	File Name	Date/Time	File Type	Size
csnc (\\comfilesrv1\	HMIS Data Entry Manual Draft 12092019...	12/16/2019 9:52 AM	Microsoft Word D...	43,541 KB
apps (\\comfilesrv1\	<b>HMIS ROI.pdf</b>	12/18/2019 10:00 ...	Adobe Acrobat D...	782 KB
Toolbox (\\comfiles	MOES Outreach staff (3).docx	10/9/2019 3:53 PM	Microsoft Word D...	14 KB
	Organizational and Motivational Theorie...	12/9/2019 11:25 AM	Microsoft Word D...	19 KB

It will automatically change to the selected document, so **Verify that it shows the correct document**

Make sure to click  at the **bottom right**.

Document Name:\* ROI

File Type:\* Realese of Information

File:\*

**HMIS ROI.pdf**

Once saved, it will show the PDF File


Client Files

Documents or other files may be stored electronically by uploading them here.

Display: [Icons](#) [Grid](#)

1 result found.

Preview ▲ Document Name ▲ File Type Created Date ▼


ROI
Realese of Information
12/18/2019 12:06PM