Stanislaus County Community System of Care

HMIS User Data Entry Manual

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

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 Carrousel | 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 | |

| Adding Case Notes | |
|---------------------------------------------------------------------|-----|
| Adding Referrals | |
| Referral Outcomes | 32 |
| Update/Annual Assessment | |
| Performing Updates (Update) | |
| Enrollment Assessment | 35 |
| Master Assessement | |
| Universal Data Assessment | |
| Performing Annual Assessment | |
| Updating Existing Assessment | |
| 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 | |
| Clients in Program | 59 |
| Service Summary Report | 61 |
| Emergency Soultions 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 Asynchronus Tasks | 137 |
| CES Coordinated Access Data Entry | |
| 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"



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 |
| _Modesto Users 2020 • |
| Organization |
| Stanislaus County Community Serv 🔻 |
| Location |
| CSA 🔹 |
| |
| Use these settings |

Open ClientTrack using these settings.

Overview of ClientTrack Features



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



Blue Action Arrow Functions



Edit Project Enty 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.



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



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 Carrousel: 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.



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

| Y Modesto Testing - ClientTrack 15 - Google Chrome | | Income Manual Red | |
|-----------------------------------------------------------|---------------------|-----------------------------------------------|-----------------------------------------------|
| https://usw.clienttrack.net/15/MainPage.aspx?Inline=false | | | |
| E ClientTrack™ Clients to All Search | Q | | Kayleigh Partain (Training) Help Sign Out |
| Harriette Celestin CLIENTID 2/19/1943 Female | | _ | |
| Harriette Celestin's Dashboard | #1 | | |
| Harriette Celestin's Information | | | <u>م</u> |
| #2 Name | Celestin, Harriette | Birth Date: 2/19/1943 | Age: 76 |
| Gender | Female | | |
| Ethnicity | Non-Hispanic/Latino | | |
| Client ID | 11694 | Race: American Indian or Alaska Native, White | |

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

| ≡ | ClientTrack** Clients * | All Search Q | 👰 ayleigh Partain (Training) H | Ip Sign Out | ŀ |
|----|-------------------------------------------|-----------------------------------------------------|------------------------------------------------------------------------------------------------|-------------|---|
| 2 | Harriette Celestin 2/19/1943 Female | | | | |
| -6 | 🕤 🛧 🍳 Find Client | ويوجعون ومراجع ومروح | | 1 🖨 🔊 | l |
| | Use the section criteria below to find yo | our client. To narrow the search, fill in more than | one criteria. Social Security Number and Birth Date are the best fields to narrow your search. | | l |
| | | First Nam | | | |
| | | Last Nam | | | |
| | | Middle Nam | | | 1 |
| | | Full Name (Last, Firs | | | 1 |
| | | Social Security Numb | | | 1 |
| | | Birth Dat | | | 1 |
| | | Scan Client I | D: ••• | Search | |

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.

| * | 2/19/1943 | Female | 1094 🥽 | | | | | |
|----------|----------------------|--------------------------|---------------------------------------------------|------------------------------------|-----------------------------------|---------------------------|--------------|----------|
| - R | 🤶 🗙 🔍 Find | Client | | | | | | 2 🔒 💼 🔽 |
| | Use the section crit | teria below to find your | client. To narrow the search, fill in more than o | ne criteria. Social Security Numbe | r and Birth Date are the best fie | ds to narrow your search. | | |
| | \backslash | | | | | | | |
| | | | First Name | ca | | | | |
| | | | Last Name | pa | | | | |
| | | "0 | Middle Name | | | | | |
| | 1 | #2 | Full Name (Last, First) | | | | | |
| | L | | Social Security Number | | | | | |
| | | | Birth Date | Ta | | ша | | |
| | | | Scan Client ID | 0 | | #1 | | |
| | | | | | | | | 🔍 Search |
| | | | | | | | | Jealch |
| | | | | | 1 result found. | | | |
| | First Name 🔺 | | Last Name 🔺 | Middle Name 🔺 | | SSN 🔺 | Birth Date 🔺 | |
| | Carl | | Parkman | < | | 604-70-7119 | 10/27/1971 | |

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

|)r Mo | odesto Testing - ClientTrack 15 - Google C | nrome and a second s |
|-------|-----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| | https://usw.clienttrack.net/15/MainPa | age.aspx?Inline=false |
| Ξ | ClientTrack™ ^{Clien} | ts 5 All Search Q |
| | Harriette Celes 2/19/1943 Female | the CLIENTID 11694 #2 Use current client if the name is in the header |
| | Intake (2298) II × | Add or Edit Do you want to add a new client or use the selected client? |
| | Add or Edit Basic Client Information Family Members | Add a new client |
| | Orogram Enrollment | Select another client #1 Add new client only if client was not found through search |

Workflow for Adding New Client

Concerning of the second

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

The system will begin by doing another internal search for duplicates

| ntake (2298) | Client Information | | | | | S 🚯 🖓 |
|--------------------|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|-------------------------------------------|--------------------------------------------|--------------|
| таке (2298) | | | | - | 0 | |
| | - | Search Existing Clients | | | Basic Client Information | |
| Basic Client | Please address the following | | | | | |
| Information | | below for potential duplicates. Click Next if | this is not a duplicate | | | |
| Family Members | | | | | | 4 |
| Program Enrollment | SEARCH EXISTING CLIENTS | 0 | | | # | |
| Program chroninen | | ient is to search existing client records for possible | matches to avoid duplica | a anto: Enter partial identifying inform | enting on the client, and then click North | ent records. |
| | | | | | | |
| | If the system finds no poten | tial matches, you will be taken directly to Step 2. | | | | en recorde. |
| | If the system finds no poten If the system finds potential | tial matches, you will be taken directly to Step 2. matches, the search results will display below. If a | in accurate match appear | | | and records. |
| | If the system finds no poten If the system finds potential | tial matches, you will be taken directly to Step 2. | in accurate match appear | | | en records. |
| | If the system finds no poten If the system finds potential | tial matches, you will be taken directly to Step 2. matches, the search results will display below. If a | in accurate match appear | | | |
| | If the system finds no poten If the system finds potential | itial matches, you will be taken directly to Step 2. matches, the search results will display below. If a tches, click Next again to continue to Step 2 in addi | in accurate match appearing a new client record. | | | in recito. |
| | If the system finds no poten If the system finds potential | tial matches, you will be taken directly to Step 2. imatches, the search results will display below. If a trhee, click Next again to continue to Step 2 in add First Name: | in accurate match appearing a new client record. | | | in recius. |
| | If the system finds no poten If the system finds potential | tala matches, you will be taken directly to Step 2. Imatches, the search results will oligola yolow. If the tohes, click Next again to continue to Step 2 in addi First Name: Last Name: Social Security Number; | n accurate match appea ing a new client record Dale Pimental 456 - 79 - 5938 | | | |
| | If the system finds no poten If the system finds potential | tial matches, you will be taken directly to Step 2. Imatches, the search results will display below. If a tches, click Next again to continue to Step 2 in addi First Name: Last Name: | in accurate match appear ing a new client record. Dale Pimental | s, select and open that existing client r | record by clicking on that row | |
| | If the system finds no poten If the system finds potential | tala matches, you will be taken directly to Step 2. Imatches, the search results will oligola yolow. If the tohes, click Next again to continue to Step 2 in addi First Name: Last Name: Social Security Number; | n accurate match appea ing a new client record Dale Pimental 456 - 79 - 5938 | | | |
| | If the system finds no poten If the system finds potential | tala matches, you will be taken directly to Step 2. Imatches, the search results will oligola yolow. If the tohes, click Next again to continue to Step 2 in addi First Name: Last Name: Social Security Number; | n accurate match appear ng a new client record. Dale Pimental 456 79 5938 08/12/1977 | s, select and open that existing client r | record by clicking on that row | |

- **#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.



- **#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 999-99-99999; 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

| Harriette Celestin | | |
|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Find Client | Harriette Celestin's Dashboard > / Client Information | e 🖲 🖶 |
| • × | BASIC CLIENT INFORMATION () | |
| Basic Client Information Family Members | information. I foliected then ClientTrack automatically records that full data quality was met. | |
| Program Enrollment | First Name: | |
| a stagenti coominin | Last Name. | |
| | Middle Name: | |
| | Suffic | A lange of the second sec |
| | | Full name reported #2 |
| | Social Security Number: | 545 [99] 9248 |
| | Basic Client Demographics | |
| | Birth Date: 1 | * 02/19/1943 · · |
| | Client Age: | 76 |
| | Date of Birth Quality: | |
| | Ethnicity. | Non-Hispanic/Latino 🔻 🦉 |
| | #3 → | Alson A |
| | | |
| | Pregnancy Status: Veteran Status | |
| | Show Address and Contact Information: | |
| | | |
| | Family Information - Use this section to collect data about a client's family. The Family search field allows you to sea | |
| | Family. | |
| | Relationship to Head of Household: | |
| | Begin Date: End Date: | |
| | | 2 Field |

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 Durning 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 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" client. in the search window and proceed entering the new household member's information.

| hbers Search mily r | | ociate ther |
|-----------------------------------------------------------------------------------------------------------------|---------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| A Find Client | 🔤 🕢 🖓 📲 🗯 | uj nouscire |
| Im pro Use the section criteria below to find your c Number and Birth Date are the best fields to wyou | re than one criteria. Social Security | welling uni |
| First Name: | | |
| Last Name: | | |
| ddle Middle Name: | | |
| Full Name (Last, First): | | SSI |
| Social Security Number: | | • 45 |
| Birth Date: Scan Client ID: | | |
| ya | | • 42 |
| | | Search 42 |
| | | - |
| | | the second se |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | Cancel |

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"

Save

惧 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.

| Emily Members Preace address the following: There is 1 row in the result set that requires attention The schedul client's family members are displayed below. Vermay se It's important to note that family members are the people who the client | | | | ise and associate them with this f | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|----------------------|-------------------|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| together to a continuum project for assistance and who live together in | | | | | |
| This workflow will allow you to enroll all family members or select whi | ch family members you want to | o enroll. | | | |
| + Birth Date Gender & SSN & | | 2 results found (+2) | | | #2 Pregnancy Due |
| Quality* ▲ Gender* ♥ ▲ SSN ▲ | SSN Quality* to He of He | lead lousehold* 🔺 | /eteran Status* 🔺 | Race* Ethnicity* 🔺 | Pregnancy Status A Date A |
| Full DOB Reported • Male 456 - 79 - 5938 | Sel | lf • | Yes • | Black or African Ame | Relationship |
| Full DOB Reporter Female 427 62 9371 | Dat | ughter 🔹 | | Affican African Black | Relationship to Head of Household is a required field. Gender is a required field. Name Quality is a required field. |
| Full DOB Reportec SELECT | Client doesn't kno 🔻 S | SELECT 🔻 | | African Ame | |
| A SELECT • | SELECT 🔻 S | SELECT 🔻 | SELECT 🔹 | SELECT • | |
| | | | | | |

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.

| Intake (2298) | C + HUD Program Enrollment | 🗿 👬 🚔 🛜 |
|-----------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| | Select the Project you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling. | |
| Basic Client Information Family Members Program Enrollment | The Project Start Date is: • for Street Outeach projects – It is the date of first contact with the client. • for Emergency Shelters – It is the night the client first storated in the shelter for the consecutive shelter period from entry to exit. Night by night shelters, will allow clients to re-entre an accessary without "withing and relating" 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 Safe Havens and Transitional Housing – It is the date the client moves into the residential project (i.e. first night in residence). • 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 summer movaries we following factors have been me 1) information provided by the client of the referal indicates they meet the criteria for admission (for example If chronic homelessness) to equired the client indicates they have a serious disability and have 1 The client has • The client has | t: e been |

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,



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

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

| Intake (2298) | 🗧 🕂 HUD Program Enrollment 🔤 💽 👔 🚔 🛐 |
|-----------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| i x | 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. |
| Basic Client Information Family Members Program Enrollment | 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 starged 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 remiter an excessary without "exiting and restarting" for each stary for a specified period. • for Sale tavens and Transitional Housing – It is the date the client moves into the residential project (<i>e</i> , first stiglt in residence). • for Sale tavens and Transitional Housing – It is the date the client moves into the residential project (<i>e</i> , first stiglt in residence). • for Sale tavens and Transitional Housing – It is the date the client moves into the residential project (<i>e</i> , first stiglt in residence). • for Sale tavens and Transitional Housing Including Rapid Re-Housing – It is the date of the criteria for admission (for example 1 chronic homelessing rough to qualify – Housing allocation that the client may application that the client was admitted into the project. To be admitted inclicates the following factors have been met: 1) information provided by the client of mome referral indicates they meet the criteria for admission (for example 1 chronic homelessings is required the client indicates they have a serious disability and have been homeless lines allo tave considered structures and they want to be housed in this project. 3) The client is able to access serices 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 the entry been of services and housing through they 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 the entry been of service. • for all other types of service projects includ |

- #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.

| Intake (2298) | 📀 🕂 HUD Program Enrolime | nt | | | | 20 21 🖨 🕄 |
|------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Basic Client Information Family Members Program Enrollment | The Project Start Date - for Street Outreach - for Emergency Shell - will allow clicents to re- - if or Safe Havens and - for all types of Perm 1) information provide to meters to rege enough - to meters to meters to meters - to meters to meters - to meters to meters - t | t contract first at exiting the dat apid Re- umentar in this to ano necessing throu- cts including but not | gh the project. The expectation is the project | er period from entry to exit. Night by in period. 1 (l.e., first night in residence), in that the client was admitted into th (for example if chronic homelessner t has a housing opening (on-site, site | tight shetters, which eproject. To be ad is is required the bases: scattered-site subsidy) or en | thad will have a project start date and factors have been met protection of the start date and factors have been met spects to have one in a reasonably short amount of client first began working with the project and |
| | | | A household is a single individual or a group dwelling unit if they were housed)." | of persons who apply together to a c | ontinuum project for assistance an | d who live together in one dwelling unit (or, for |
| (| Name Pimental, Dale Aaron Pimental, Julie Prya | Gender 🔺 Male Female | Age - Start Date + 42 10/02/2019 | Case Manager 🔮 🔺 Kayleigh Partain | Head | ionship to of Household* |

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.



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 Situtation:* | mergency 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:* | | Living Citystics is conditional | | | |
| 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 • | Living Situation is conditional questions, depending on the project | | | |
| Total number of months homeless on the street, in ES, or SH in the * past three years : | - SELECT V | 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.

| lealth Insurance - Please indicate v | whether or not the client is covered by he Covered by Health Incuran | | | o record health insurance sources for the surance Status | client. | #2 |
|--------------------------------------|-------------------------------------------------------------------------|-----------|-----------------|-------------------------------------------------------------|------------------|------------|
| \subset | Phane Ray Health Insurance | 1 | Status* ▲ No | Reason No 🥹 🔺 | Other Coverage 🔺 | #2 |
| | Medicare | | | SELECT | | ø ø |
| | Medicaid #1 State Children's Hea | am S-CHIP | | SELECT | | 60 10 |
| | Veteran's Administr | Services | Yes 🔻 | \leftarrow | | 1 0 |
| | Employer-Provided Health Health Insurance obtained through CO | BRA | | SELECT | | <u>ଜ</u> |
| | Other Public State Funded Insurance for Adults (M | -diD | | - SELECT | | |
| | Combined Children's Health Insurance | | | - SELECT - | | s (1) |
| | Indian Health Service (IHS) Other | | | SELECT | • | |
| | No insurance | | | | • | • |
| | | | | | | Save |

| | Dal | 11613 | A33C35IIIC | 111 | | | | | |
|----------|------------------------------------------------------------------------------------|----------|-----------------------|-----------------------------|-----------------------------|---------------------------------|-----------------------|----------------------------------------------------------------------------------------------|---------|
| 🧲 Uni | versal Data Assessment 🕨 🔚 🛙 | Barriers | | | | | | 🥃 🕕 👔 📲 🙀 | |
| | s form to identify whether a client s or click View Barrier History to r | | | ients last assessment is di | splayed as a default. You r | nay, optionally, click I | Previous Barriers Det | tail to view information about the defaulted | |
| Assessm | #1 | | Screen: | 06/01/2019 📑 | | | a barrie they m | mind, if the client has r which is Indefinite, nust have disabling ition marked yes | ry I |
| <i>Y</i> | Barrier 🗠 | Help 🔺 | Barrie Present?* ▲ | Conditio | | Explanation 🔺 | | Previous Barrier Details | |
| v 💙 | Alcohol Abuse | 0 | NoV | • | | | | Previous Barrier | 6 |
| e 💙 | Chronic Health Condition | o (| Yes | Yes | \rightarrow | | | Previous Barrier | 6 |
| e 💙 | Developmental Disability | 0 | No | • | | | | Previous Barrier | Ø |
| v 🍞 | Drug Abuse | 0 | No | • | | | | Previous Barrier | 5 |
| e 🍞 | HIV/AIDS | 3 | No | • | | | | Previous Barrier | 6 |
| e 📝 | Mental Illness | 0 | Yes | Yes | • | | | Previous Barrier | ß |
| * | Physical Disability | 0 | Yes | • Yes | | | | Previous Barrier | 6 |

Barriers Assessment

- #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

TT T T A



*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.

| | rmancial Assessment |
|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Intake (2298) | 🕞 Universal Data Assessment 🕨 Domestic Violence Assessment 🕨 🦯 Income and Sources, Non-Cash Benefits |
| ii x | Indicate below the client's sources of monthly income, non-cash benefits and expenses. |
| Basic Client Information Family Members Program Enrollment Pimental, Dale Aaron Universal Data Assessment | The following instructions are quoted from the HMIS Data Manual: When a client has income, but does not know the exact amount, a "ves" 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 perfuder requirements. Projects collecting data that whether they receive income 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, the response to 'C arred in orce would be 'No.'' As a further example, if a client's most recent psycheck wa's age 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). |
| Barriers / Special Needs | Assessment Active |
| Domestic Violence Income Employment Pimental, Julie < Prya | 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 Date: Income from Any Source: Non-Cash Benefits from Any Source: | * Yes • • • | |
|-------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|------------------------------|
| e | Expenses: | SELECT | |
| | | | Мо |
| | Туре 🛥 | Description 🔺 | Amou |
| | Earned Income | | |
| | Unemployment Insurance | | \$800 |
| | Supplemental Security Income | Sam \$600 | \$600 |
| | Social Security Disability Income Private Disability Insurance | | |
| | Worker's Compensation | | |
| | VA Service-Connected Disability Compensation #2 | . | |
| | VA Non-Service-Connected Disability Pension | | |
| | Pension or retirement income from a previous job | | |
| | TANF | | |
| | General Assistance | | |
| | Retirement (Social Security) | | |
| | Child Support | #5 | |
| | Alimony | #0 | |
| | Other Income | | |
| 1 | | | |
| | No Financial Resources | Count/Total Monthly Income: | 2 \$1.40 |
| ach [| | Count/Total Monthly Income: | 2 \$1,40 |
| ash E | No Financial Resources | Count/Total Monthly Income: | |
| ash E | Benefits Type 🛥 | Count/Total Monthly Income: | #3 |
| ash I | Benefits Type Type Special Supplemental Nutrition Program for Women, Infants, and Children | | #3 Mont |
| ash I | Benefits Type 🛥 | | #3 Month |
| ash I | Benefits Type Type Special Supplemental Nutrition Program for Women, Infants, and Children | | #3 Mont |
| ash I | Benefits Type Special Supplemental Nutrition Program for Women, Infants, and Children Supplemental Nutrition Assistance Program (SNAP) | | #3 Mont |
| ash I | Benefits Type Special Supplemental Nutrition Program for Women, Infants, and Children Supplemental Nutrition Assistance Program (SNAP) TANF Child Care Services | | #3 Mont |
| ash I | Benefits Type Special Supplemental Nutrition Program for Women, Infants, and Children Supplemental Nutrition Assistance Program (SNAP) TANE Child Care Services TANE Transportation Services | | #3 Mont Amount \$300.0 |
| ash I | Benefits Type Special Supplemental Nutrition Program for Women, Infants, and Children Supplemental Nutrition Assistance Program (SNAP) TANE Child Care Services TANE Transportation Services Other TANF-funded Services Other TANF-funded Services | | #3 Mont |
| ash I | Benefits Type ▲ Special Supplemental Nutrition Program for Women, Infants, and Children Supplemental Nutrition Assistance Program (SNAP) TANF Child Care Services TANF Transportation Services Other TANF-Tunded Services Other Source | | #3 Mont Amount \$300.0 |
| ash I | Benefits Type Special Supplemental Nutrition Program for Women, Infants, and Children Supplemental Nutrition Assistance Program (SNAP) TANF Child Care Services TANF Transportation Services Other TANF-funded Services Other Source Section 9, Public Housing, or Other Rental Assistance ¹ | | #3 Mont Amount \$300.0 |

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: <u>Change Assessment Date</u> | Universal Data Assessment* 08/06/2019 | Default Client's Li | ast Assessment 😻 | | |
|--------------------------------------------------------------|--------------------------------------------------------------|---------------------|----------------------------------|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | Universal Data Assessment* 08/06/2019 | veran cherits D | | | |
| | Information Date: 08/08/2019 | | | | |
| | | | | | |
| | Age while in project: 9 | | | | |
| | Assessment Type: Entry | ٣ | | | |
| | Disabling Condition:* No | | | | |
| | | | | | |
| Health Insurance - Please indicate whether or not the client | t is covered by health insurance. If so, you will be able to | o record health i | nsurance sources for the client. | | |
| | | Default Last In | surance Status | | |
| C | overed by Health Insurance:* Yes | | | | |
| | | | Reason No 💷 🛦 | | |
| Typ | | Status" | | Other Coverage 🗻 | a. |
| | | | - SELECT - | | 0 |
| | | | - SELECT - | | 0 |
| 🗙 sti | ate Children's Health Insurance Program S-CHIP | Yes | | | 0 |
| 🗙 Ve | eteran's Administration (VA) Medical Services | No | - SELECT - | 1 | a de la dela de la dela dela dela dela d |
| ¥ Err | nployer-Provided Health | No | - SELECT | | an a |
| 🗙 не | ealth Insurance obtained through COBRA | | - SELECT - | • | n |
| | | | - SELECT - | | o |
| | | | - SELECT - | | a de la companya de la company |
| | | | - SELECT - | | s |
| | | | - SELECT - | | |
| × ott | | | - SELECT - | | ••• |
| × No | o insurance | No | - SELECT - | | 9 |

Barriers Assessment for Child

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

| ssessment | Active | | | | | | | |
|------------------|--------------------------|--------|------------------------|---------------|----------------------------|---------------|--------------------------|--|
| | | | Identified Date:* | 08/06/2019 📑 | | | | |
| | | | Screen: | Special Needs | • | | | |
| | | Disa | bling Condition: | No | Ŧ | | | |
| | | | | | | | | |
| | | | | | | | | |
| | Barrier 🗠 | Help 🛋 | Barrier Present?* 🔺 | | Condition is Indefinite | Explanation 🛦 | Previous Barrier Details | |
| 2 2 2 2 | Alcohol Abuse | 0 | No | • | | | Previous Barrier | |
| 2 | Chronic Health Condition | 0 | No | | | | Previous Barrier | |
| 2 | Developmental Disability | 0 | No | | | | Previous Barrier | |
| 7 7 7 | Drug Abuse | 0 | No | | | | Previous Barrier | |
| 2 | HIV/AIDS | 0 | No | | | | Previous Barrier | |
| 2 | Mental Illness | 0 | No | • | | | Previous Barrier | |
| 2 | Physical Disability | 0 | No | | | | Previous Barrier | |



Completing Intake Workflow

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

| Intake (2298) | You're done! All required steps have been completed. |
|--------------------------------------------------------|---------------------------------------------------------|
| Basic Client Information | → Einish for the workflow |
| Family Members | |
| Program Enrollment | #1 |
| Pimental, Dale < Aaron | # 1 |
| Pimental, Julie < Prya | |

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



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

| ≡) ClientTrack™ C | ients 4 All Search Q | usw.clienttrack.net says | Rayleigh Partain (Training) Help Sign Out |
|--------------------------------------------------|------------------------------------------------------------------------------------------|------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | CLIENTID 11690 | The workflow was paused successfully! | > |
| Intake (2298) | he workflow amily Members The selected client's family members are displayed below | w. You may search for existing clients to add to this family or add new clie | ents to the database and associate them with this family. |
| Basic Client Information | | | usehold. According to HUD "[a] household is a single individual or a group of persons who apply would live together in one dwelling unit if they were housed." (Data Manual) |

Resume A Paused 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.

| | Dale Pimental 8/12/1977 Male | | |
|-----|---------------------------------|-------------------------------|-------------------------------------|
| E | Dale Pimental's Dashboard | | |
| Dal | e Pimental's Information | | |
| | Name: | Pimental, Dale Aaron Birth Da | e: 8/12/1977 |
| | Gender: | Male | |
| | Ethnicity: | Non-Hispanic/Latino | |
| | Client ID: | 11690 Rat | e: 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)



Supportive Services for Veteran Families (SSVF) Enrollment

Make Sure the Veteran Status is marked Yes for the HOH



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



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 of apartment, room, or house where the client last lived for 90 days or more. Addresse | 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 th es of emergency shelters should NOT be recorded here. |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Address Prior To Entry Quality | Full address reported |
| Address:* | |
| Addrese 2: | |
| City, State, Zip Code: | City , State Zip Code |

Veteran Assessment

For all Head of Household Veterans

| E | Universal Data Assessment 🕨 🕂 Veteran Information | | | 31 🚔 |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|--------------------------------------------------------------------|-------------|
| Т | ne Veteran information is used to collect details about the veteran's service. | | 6 | |
| | | T. 1992 | If you do not know the exact full date | |
| | Branch and Discharge Status - Please select the branch and discharge than one branch of the military, select the branch in which the veteran s | | pre e. " | |
| | Branch of the Military:* | Navy • | · · · · · · · · · · · · · · · · · · · | |
| | Discharge Status:* | Honorable • | | |
| | ary Service Dates - In the interest of data quality ClientTrack provides date fiel IMIS purposes, ClientTrack will always calculate years of military service only | | e first of the year or another standard date determined by your or | ganization. |
| | Service Entry Date:* 11/24/1941 | | Service Exit Date:* 11/26/1971 | |
| | Please Select Theatre(s) of Operation(s) 🔺 | | Status* 🔺 | |
| | Theatre of Operations: World War II | | Yes | ø |
| | Theatre of Operations: Vietnam War | | Yes 🔻 | ß |
| | Theatre of Operations: Persian Gulf War (Operation Desert Storm) | | No | ß |
| | Theatre of Operations: Afghanistan (Operation Enduring Freedom) | | No 🔻 | Ø |
| | Theatre of Operations: Iraq (Operation Iraqi Freedom) | | No | ß |
| | Theatre of Operations: Iraq (Operation New Dawn) | | No 🔻 | Ø |
| | Theatre of Operations: Other Peace-keeping Operations or Military Interventions | (such as Lebanon, Panama, Somalia, Bosnia, Kosovo) | No 🔻 | Ø |
| | Theatre of Operations: Korean War | | Yes 🔻 | ß |
| | | | | |
| | | | | 📕 Save |

۲

Connection with SOAR

Connection with SOAR:* -- SELECT --

HP ONLY SSVF Homelessness Prevention Assessment

| SSVF Homelessness Prevention | | 🗐 🚯 🚯 🦉 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| SSVF Homeless Prevention Assessment | | |
| 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: | YesNo | |
| 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.

| 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



Education Assessment:





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

RHY Entry Assessment:

| Assessment I | Date:* | 10/02/2019 🔳 | | | | | | |
|----------------------|--------|----------------------------------------------------|-----------|----------|-----|--|--|--|
| Sexual Orientation:* | | Heterosexual • | | | | | | |
| Referral Source:* | | Self-Referral | | | | | | |
| | | | | | | | | |
| | Cri | tical Issue 🔺 | Status* 4 | A | | | | |
| | 🗹 Ur | nemployment - Family member | Yes | No | ଜ | | | |
| | M | ental Health Issues - Family member | Yes | No | ത | | | |
| | 🗹 Pł | nysical Disability - Family member | Yes | No | ଜ | | | |
| | 🗹 🛛 Al | cohol or other drug abuse - Family member | Yes | No | ଜ | | | |
| | 🗷 In | sufficient Income to support youth - Family member | Yes | No | ത്ര | | | |
| | 🗹 In | carcerated Parent of Youth | Yes | No | ଜ | | | |

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

| | 1 | System 🔺 | Formerly a Ward Of:* 🔺 | Number of Years 🔺 | Number of Months (1-11) 🔺 | Answer all |
|----------------|---|----------------------------------|------------------------|--------------------|---------------------------|------------|
| (| | Child Welfare/Foster Care Agency | No 🔻 | | | questions |
| > | | Juvenile Justice System | Yes 🔹 | Less than one year | • 3 4 9 | |
| Must Mark hath | | | | | | |

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

| 🗧 🕂 HUD Program Enrollment | 2 🕢 👔 🚔 ? |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| 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. | |
| time the state and the state of Consistence of Cons | been met: |
| Househo VIS Data Standards Tranual '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 i no would live together in one dwelling unit if they were housed)." | |
| Southern, Male 57 10/02/2019 Kayleigh Partain 🔍 Self | ø |
| 1 | |

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.

| 🥎 🕂 Universal Data Assessment | | | | | | | | | | |
|----------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|--|--|--|--|--|--|
| Complete the information below related to the selected client's housing status and other relevant information. | | | | | | | | | | |
| Note: | | | | | | | | | | |
| Changing any project setup data with existing enrollments may aff | 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 to 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 V | | | | | | | | | |

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.

| Assess | sment Active | | | | | | | | |
|---------|--------------------------|--------|------------------------|---|------------------------------------------|---|---------------|--------------------------|--------|
| Screen: | | | | | 10/02/2019 🗐 Special Needs • Yes • | | | | |
| | Barrier 👄 | Help 🛎 | Barrier Present?* 🔺 | | Condition is Indefinite 📥 | | Explanation 🔺 | Previous Barrier Details | |
| | Alcohol Abuse | 0 | No | • | | | | | |
| | Chronic Health Condition | 0 | No | • | | | | | |
| | Developmental Disability | 0 | No | • | | | | | |
| | Drug Abuse | 0 | No | • | | | | | |
| • | HIV/AIDS | 0 | No | | | | | | |
| | Mental Illness | 0 | Yes | • | Yes | • | | | - |
| | Physical Disability | 0 | Yes | | Yes | | | | \sim |

PATH Contact, Current Living Situation

| C . Domestic Violence Assessment 🕨 Income and Sources, Non-Cash Benefits) | Current Living Situation | 🔄 🕕 41 🖻 |
|----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|----------|
| 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:

| | lients 4 All Sea | arch | ۹ | | | | | | Rayleigh P | Partain (Training) | Help |
|------------------------------------------|-----------------------------|----------------------------|--------------------|----------------------|-------------------|-----------|--------------------------|------------------|--------------|--------------------|------|
| Kelvin Southe | ern CLIENTID ale 11697 | A | | | | | | | | | |
| Kelvin Southern's D | ashboard | | | | | | | | | | |
| Kelvin Southern's Informa | tion | | | | | | | | | | |
| | | Name: Southern, Kelvin I | Michael | | Birth D | ate: 11/2 | 28/1961 | | | | Age |
| | | Gender: Male | | | | | | | | | |
| | , | Ethnicity: Non-Hispanic/La | tino | | | | | | | | |
| | | Client ID: 11697 | | r | | ICE: Blac | k or African American. W | hite | | | |
| | | | | | #1 | Diac | a vi Aincan Ainencan, n | | | | |
| Kelvin's Enrollments | | | | _ | | | | | | | |
| | | | _ | | | | | | | | |
| Enrollment Description | Active Household Members | lousehold Type | Beoject Start Date | Housing Move-In Date | Project Exit Date | Case ID | EnrollID Days Enrolled | Exit Destination | Organization | Last Assessed | Prog |
| Active Active Active | | | | | | | | | | | |
| Street outreach PATH Street Outreach | 1 | iousehold without Children | 10/02/2019 | | | 9431 | 11963 0 | | BHRS | 10/2/2019 | 4 |
| | K | | | | | | | | | | |
| | | | | | | | | | | | |
| Kelvin's Services | > | | | | | | | | | | |
| Kelvin's Services | > | | | No ri | cords found. | | | | | | |

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



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

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

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

| Ramily Members | Active | |
|---------------------|-------------------|--|
| Services | Quick Services | |
| Veteran Information | Kelvin's 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.



#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

| Client Case Notes > | 🕂 Case Note with Se | | | | | | | | 🔤 🕢 📰 🔯 🖨 |
|--------------------------------------------------|------------------------------------------------------------|----------------------------------------------------|------------------------------|-------------------------------|--------------------------------|-----------------------------------------|--------------------------|----------------------------------------------------|-----------------------|
| Complete case note Entr been unchecked. Recon | ry Date. Verify the User red d services associated with | cording the note. Enter this case note using th | e lower portion of the form. | 01/06/2020 🔄 Patty Estrada | lete the case note in the text | editor field. If Read Only is ch | ecked, no one will be at | ive to delete or edit the case note unless the n | ead only checkbox has |
| Sase Note | | | | | | | | | |
| case Note Client Name: Carmen I | | | (| | | | | | |
| rvices - Use the fields be | low to record the services | #2 | with the note above. | | | | | R | |
| | | | Default Enrollment: | - SELECT | • | | | | |
| + | | | | | | | | Staving on Streets, | |
| Service" + | | | • | Enrollment" A | • | Units Of Measure* A | Unit Value* 🔺 | Units* Total Staying on Streets, ES or SH S0.00 | \sim |
| - SELECT - | | | | - SELECT - | - | - SELECT - T | | 30.00 | |
| | | | | | | | | | 😸 Save 🗙 Cancel |
| | | | | | | | | | |

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

| | Client Case N | otes 🕨 🕂 Ca | ase Note with Services | | | |
|---|---------------|----------------|-------------------------------------------------------------|-----------------------------------|---------------------------|-------------------------------------------------------------|
| | | | Verify the User recording the unchecked. Record service: | | | ote in Regarding . Complete the portion of the form. |
| | Home Format | | roboto, "helv | Itry Da Us Igardi ote Ty | ser:* Kayleigh Partaing:* | |
| (| Case Note | elvin Southern | | | | |

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

| Client Case Notes > 📥 Case Note with Services | | 💆 🛈 ar 🖬 🤅 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| Complete case note Entry Date. Verify the User recording the note. Enter a brief title on the read only checkhow has been unchecked. Record services associated with this case | description for the note in Regarding. Complet | te the case note in the text editor field. If Read Only is checked, no one will be able to delete or edit the case note unless |
| and read only checkbox has been districted. Hecord betrices associated with this case | Time using the town portion of the form | |
| Entry Date | * 10/02/2019 📰 | |
| User | Kayleigh Partain Q | |
| Regarding | Case Management | |
| Note Type | - SELECT • | |
| nplate: Option not in the list • | | |
| | | |
| ase Note | | |
| ient Name: Kelvin Southern | | |
| net with the client and spent 45 minutes going over housing options. | | |
| ient is to return in 14 days. | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| Read Only | · *) | |
| | | |
| vices - Use the fields below to record the services provided in association with the note | above. | |
| Default Enrollment | - SELECT · | |
| | | |
| | | |

| | € ★ | r 🔍 Client Case No | otes | | | | | | 🔙 🕕 👔 🗴 | : 🗑 🖨 ? |
|----------|------------|----------------------------|------------------------------------------------------------------------|-----------------------|------------------------------------|----------------------------|------------------------------------|------------------------------|---------------------------------|----------------|
| - [| The cli | ient's case note history d | displays below. To create a new case note, click Add New Case Note. To | view or edit a case n | note, click Edit Case Note next to | the record. To preview and | I print case notes, check the Prin | nt box next to one or more o | ase notes, and then click Print | Selected. |
| | | | | | | | Print | | 🕂 Add New Case Note | Print Selected |
| | | | | | 1 result found. | _ | | | \frown | |
| \wedge | | Date 🔝 | Regarding 🔺 | User 🔺 | (| Organization 🛋 | | | Print 🗉 🔺 | |
| (| • | 01/06/2020 | Test Note | Patty Estrada | (| enter For Human Services | | | - 1 | |
| \sim | and V | iew Case Note | | | | | | | \sim | |
| | <u>/</u> E | dit Case Note | View or Edit | | | | | | | |

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

| | | Clients | - | ClientTrack | 5 All Sea | | |
|--------------------|-----------|------------------------------------------------------------------------------------------------------------------|---------|----------------------------------|----------------------------------------|--------------------------------------------------|-----------------------|
| | | 🔍 Find Client | < | 🕵 Kelvin So | 116 | | |
| | | Intake | | Kelvin Souther | | | |
| | | CASE MANAGEMENT | | Kelvin Southern's Inf | | | |
| | | Client Dashboard | _ | | | | |
| | | 🚴 Edit Client | > | | | | |
| | | Tiving Situation | | | | | |
| | | Enrollments | | | | | |
| | | Assessments | > | Kelvin's Enrollments | | | |
| | | Case Notes | | Enrollment | Active House | | |
| | | Referrals | > | Description | Member | | |
| | | Services | | ⊿ Street outreach | | | |
| | | Veteran Information | | PATH Street Outres | ach 1 | | |
| | | COORDINATED ACCESS | | Kelvin's Services | | | |
| | | | | | | | |
| 🛨 🍳 Client Referra | | | | | | |) XI XI 🗑 🖨 🔊 |
| | | add a new referral for the client, click the Add New bu cher, click Referral Voucher next to the desired reco | | w or edit a record displaying in | the list, click Edit next to th | ne desired record. To get directions from the cl | ient's address to the |
| | | | | | \subset | Add New Quick Referrals | A Incoming Referral |
| | | | No reci | ords found. | | | |
| Status 🔺 | Service 🔺 | Provider 📥 | | Date 😎 | Incoming 📥 | Approx Distance (in mi.) 🔺 | |
| | | | | | | | |
| | | | | | | | |
| On Referrals s | | Add New | | | | | |

- **#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.

| ify the service and the provider being referred to. | | Referral Date:* Referral Service:* | 10/02/2019 m - SELECT - |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| al recipient as the Refer to Provider. There to Provider. The Provider. The Provider. Refer from Provider. Refer from Verson Status: Comments: Encollment: Encollment: Encollment: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments: Comments | 0/02/2019 StEED - StEED - Ormmunity Mental Health ducational Services mployment Assistance to come Assistance to come Assistance to Come Assistance to Come Assistance terrat to Checker And the dopening terrat to Denote Intrumum services terrat to Checker Angelet Assistance terrat to Denote Project/unit/resource opening terrat to post-placement/follow-up case management terrat to Denote Project | Refer to Provider. Refer to Provider. Refer to Provider. Refer from Provider. Refer from Ver: H2 Comments: Enrolment: Associated Need/Farrier: | Medical Assistance Primary Health Services Referral Referral to Emergency Shelter bed opening Referral to Lousing Navigation project or services Referral to Non-continuum services: No availability in continuum services Referral to Non-continuum services: No availability in continuum services Referral to Non-continuum services: No availability in continuum services Referral to Non-continuum services: Ineligible for continuum services Referral to Ost-placement/follow-up case management Referral to Pervention Assistance project Referral to Pervention Assistance project Referral to Pervention Assistance project Referral to Scheduled Coordinated Entry Vousing Needs Assessment Referral to Street Outreach project or services Referral to Street Outreach project or services Referral to Transitional Housing bed/unit opening Referral to Transitional Services |
| | teferral to PSH project resource opening teferral to RRH project resource opening * | | Substance Use Treatment |

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.

| 🔍 Search | | | | | X | |
|-------------|-------------------------------------------------------------------------------|-----------------|---------|----------------------|---------------|--|
| Rind Provid | ler | | | | i) 👔 📲 🚔 | |
| | er by using the selection criteria bel ge your search, change the selectio | | | lection criteria bla | nk and select | |
| ti | ge your search, change the selection | | arcn. | | | |
| | Provider: | | | | | |
| | Street Address: | | | | | |
| | Zip Code: | | | | | |
| R | City: | | | | | |
| R | State: | | | | | |
| | | | | | Search | |
| er | | | | | | |
| | | 1 result found. | | | | |
| Provider 🛆 | Street Address 🔺 | Zip Code 🔺 | City 📥 | State 🔺 | Notes 📥 | |
| BHRS | 800 Scenic Dr | 95350 | Modesto | CA | | |

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 | O Voucher and Information Release | O Referral Outcome |
| 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: Status | BURS PATH + | |
| Comments: | Referrar Made - | |
| | | |
| 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 | | 🔤 🕃 🔂 |
|-----------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| 0 | | 0 |
| Referral | Voucher and Information Release | Referral Outcome |
| VOUCHER AND INFORMATION RELEASE | | |
| Voucher Information - Please complete the following information if your organization has auth | orized a voucher for this service. | |
| Voucher is Authorized: | | |
| Information Release - If the Client has authorized that his/her information can be released to treferral. | he selected provider, please indicate this below. Doing so will cause a | n email to be automatically generated and sent to this provider with information regarding the |
| Email Authorized: | | |
| | Previous Next X Cancel | |

Referral Outcomes

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

| Client Referrals > | 🕂 Referral | | 🚍 🚯 👔 🚔 |
|-------------------------|---------------------------------------------------------------------|--------------------------------------|------------------|
| | ♥ Referral | Voucher and Information Release | Referral Outcome |
| | Reienai | voucher and mormation Release | Referrar outcome |
| REFERRAL OUTCOME | | | |
| Outcome Information - E | nter the Date Acknowledged by the referral recipient, Appointment D | te and Time, Result Date and Result. | |
| | Date Acknowledged: | 10/02/2019 💷 | |
| | Appointment Date: | 10/02/2019 💷 ដ | |
| | 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.

| ۹ 🗲 | Client Referrals | | | | | 20 | a 👷 🖉 🚔 ? |
|---------------------------------|--------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|--------------------------------|------------------------------------|---------------------------|---------------------|
| Below is a lis provider's na | t of all existing referrals for the selected me. To print a referral voucher, click Re | d client. To add a new referral for the client, click the Add New but ferral Voucher next to the desired record. | ton. To view or edit a record displaying in the list, click Edit | next to the desired record. To | get directions from the client's a | ddress to the provider, c | lick the on the |
| | | | | | | | |
| | | | | | 📥 Add New | 🗮 Quick Referrals | A Incoming Referral |
| | | | 1 result found. | | | | |
| | Status 🔺 | Service 🔺 | Provider 🔺 | Date 😎 | Incoming 🛥 | Appro Dista (in m | nce |
| 0 | Referral Made | Community Mental Health | BHRS | 01/06/2020 | No | Unkn | nwo |

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

| ClientTrack™ | Clients \$ All Search | ٩ | | | | 🌲 Patty Estrada (Trai | ning) Help Sign Ou |
|----------------------------------------------------|----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|-----------------------------------------------------|--------------------------------------------------|------------------------------------|-----------------------------|------------------------|
| Patricia B 2/1/1996 | entley CLIENTID Female 11468 | | | | | | |
| 🗧 🛨 🔍 Client F | Referrals | | | | | | ai 🛛 🔯 🖨 ? |
| Below is a list of all ex provider's name. To p | isting referrals for the selected client. To ad rint a referral voucher, click Referral Vouche | d a new referral for the client, click the Add New b r next to the desired record. | utton. To view or edit a record displaying in the l | ist, click Edit next to the desired record. To g | et directions from the client's ad | ldress to the provider, cli | ick the on the |
| | | | | | | | |
| | | | | | 📥 Add New | ⊟ Quick Referrals | alincoming Referra |
| | | | 1 result found. | | | | |
| Edit Referral | Status 🔺 | Service 🛋 | Provider 🔺 | Date 🤝 | Incoming 🔺 | Appro: Distan (in mi. | ice |
| <u>/0</u> | Referral Made | Community Mental Health | BHRS | 01/06/2020 | No | Unkno | wn |

Scroll down and update the data on outcomes and Finish

| Employment Assistance > / Referral | | 🚍 🚯 👔 🚔 |
|----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|
| | 0 | • |
| Referral | Voucher and Information Release | Referral Outcome |
| 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 V | |
| VOUCHER AND INFORMATION RELEASE | | |
| | | |
| Voucher Information - Please complete the following information if your organization has au | horized a voucher for this service. | |
| Voucher is Authorized: | | |
| Information Release - If the Client has authorized that his/her information can be released to referral. | 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 |
| Email Authorized: | | |
| REFERRAL OUTCOME | | |
| | | |
| Outcome Information - Enter the Date Acknowledged by the referral recipient, Appointment D | ate and Time, Result Date and Result. | |
| Date Acknowledged: | 10/02/2019 | |
| Appointment Date: | 10/02/2019 🧰 👬 | |
| Result Date: | | |
| Result: | SELECT • | |
| Comments: | | |
| | | |
| | | Finish 🗙 Cancel |
| | | |
| | | |
| Voucher is Authorized: | | |
| | ted provider, please indicate this below. Doing so will cause an email to be automatically generated and sent to this pro | vider with information regarding the referral. |
| Email Authorized: | | |
| REFERRAL OUTCOME | | |
| Outcome Information - Enter the Date Acknowledged by the referral recipient, Appointment Date and | ime, Result Date and Result. | |
| Date Acknowledged: | 10/02/2019 | |
| Appointment Date: | 10/02/2019 📼 👗 | |
| Result Date: | | |
| Result | Service Provided | |
| Comments: | - SELECT Service Provided | |
| | Information Only Rejected | |
| | No Show | Can |
| | | |

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

| Mc | odesto Testing - ClientTrack 15 - Google Ch | rome | | | | 0 × |
|-------|---------------------------------------------|---------------------------------|---------------------------|-------------------------------------------------------------------------------------------------------------|------|----------|
| 8 | https://usw.clienttrack.net/15/MainPa | ige.aspx?Inline=false | | | | Q |
| = | ClientTrack" Clients * | All Search | ٩ | Ratty Estrada (Training) | Help | Sign Out |
| 20 | | D585 🛕 | | | | |
| 10 | Ken Paul's Dashboard | | | | | _ |
| | Ken Paul's Information | | | | | - |
| | | | Name: Paul, Ken | Birth Date: 3/13/1980 | \ge: | 39 |
| | | | Gender: Male | | | |
| | | E | thnicity: Hispanic/Latino | | | |
| | | c | Client ID: 10585 | Rack: Black or African American | | |
| | Ken's Enrollments | | | | | - |
| | | | # | 1 result found. | | |
| | Enrollment Description | Active Household Household Type | Pn | g Move-In Date Project Exit Date Case ID ErrollID Days Enrolled Exit Destination Organization Last Assessed | Prog | ram Type |
| | Active Emergency shalter | _ | | | | |
| | CHSS TANF/Motel Vouchers | 1 Household without | t Children 10/24/2014 | 7989 10282 1900 Community Housing and Shelter Services 10/24/2014 | 1 | |
| | Add Household Member | | | | | |
| | Associated Assessments | | | No records found. | | |
| | Exit the Enrollment | Service | | Units \$ Total Organization | | |
| | Edit Enrollment | | | | | |
| | Edit Project Entry Workflow | | | | | |
| | 🔶 Link Assessments | | | | | |
| | Review Entry Assessments | | | | | |
| | Update/Annual Assessment | | | | | |
| | 7 | < | | | | |
| | | | | | | |
| | | | | | | |
| | | ``` | #2 | | | |
| | | | - #4 | | | |
| | | | | | | |
| | | | | | | |
| evesc | riptvoid(0); | | | | | |

Enrollment Assessment

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

| sessment For | | Ken Paul's Dashboard | - | | | | | | 🖉 🕕 🗿 🖉 |
|--------------|--------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|
| rollment | | elect the Project you ar | re enrolling the client int | o. ClientTrack will o | display a list of clients in the cl | lient's family. Please select all the clien | ts you are enrolling. | | |
| Enrollment | • f • f • f 1) th 2) 3) • f | for Emergency Shelten s necessary without "ev for Safe Havens and Tr for all types of Perman) Information provided i nough all documentatio) The client has indicatu) The client is able to as | ojects – it is the date of rs – it is the night the cli xitting and restarting ' for ransitional Housing, including by the client or from the on may not yet have bee ted they want to be hous access services and hou | ent first stayed in the reach stay for a sp is the date the clie Rapid Re-Housing ereferral indicates the n gathered ; sed in this project; sing through the pr | he shelter for the consecutive : ecified period. Int moves into the residential p – it is the date following appli hey meet the criteria for admi oject. The expectation is the p | roject (i.e. first night in residence). cation that the client was admitted into ssion (for example if chronic homeless roject has a housing opening (on-site, s | o the project. To be admitted ness is required the client in site-based, scattered-site sul | a bed-night tracking method will have a project start date and indicates the following factors have been met dicates they have a serious disability and have been homeles bsidy) or expects to have one in a reasonably short amount o the date the client first began working with the project and ge | ss long enough to qualify – f time |
| | | | | | Project:* CHS | S TANF/Motel Vouchers 塑 | | | |
| | | | the HMIS Data Standards dwelling unit if they were | | old is a single individual or a g | roup of persons who apply together to | a continuum project for ass | istance and who live together in one dwelling unit (or, for pers | sons who are not housed, wh |
| | | Name 🔺 | Gender 🔺 | Age 🛋 | Project Start Date 🔿 | Case Manager 🥶 🔺 | | Relationship to Head of Household* 🔺 | |
| | 2 | Paul, Ken | Male | 39 | 10/24/2014 | Lynnell Fuller | Q | Self V | |
| | | | | | | | | | |
| | | | | | | | | | |

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



Master Assessement

#1. Verify the Assesment Date **#2.** Save

| - | Ken Paul 3/13/1980 Mai | 10585 🔔 |
|----|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | ssessment For | 🍯 🕂 Master Assessment 💆 🕑 👔 🚔 |
| Er | nrollment "× | 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. |
| | Enrollment | Assessment in the * 10/24/2014 |
| Ĵ | Paul, Ken ^ | Advantes Type |
| J | Type of Assessment | Progenities Party Estada 🗳 🗰 |
| 1 | During Program Enrollment | Comments - If you have any other comments or notes regarding this assessment, please enter them below. |
| | Assessments | Comments: |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | #2 |
| | | |
| | | |
| | | |
| | | |
| | | M Save |
| | | Call Only Call |

Universal Data Assessment

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

| Assessment Date:* 04/04/2017 Age at Assessment 20 Assessment Type:* Viringi Program Encilment * Assessment Type:* Program: SHP * Client Location - Select or enter the CoC code assigned to the geographic area where the head of household is staying at the time of project entry. Client location will be defaulted to the program's CoC within a workfld Client Location: CA-510 - Turlock/Modestor/Stanislaus County CoC * 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 * Covered by Health Insurance: * Yes * Private Pay Health Insurance * Private Pay Health Insurance Program S-CHIP No * -SELECT - * Medicare No * -SELECT - * Medicare No * -SELECT - * Medicare No * - SELECT - * Medicare No * Mo * * Medicare No * Mo * * Mo * * Medicare No * Medica | 🕤 🕂 Universal Data Asse | ssm | ent | | | | | | a 🖓 🚯 👔 🚔 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|------|------------------------------------------------|-----------------|------------------|--------|---------------------------------------------|-----------------------------------------|-----------------------------|
| Age at Assessment: 20 Assessment Type:* During Program Enrollment * Assessment Type:* Upmall Fuller Program: SHP * Client Location - Select or enter the CoC code assigned to the geographic area where the head of household is staying at the time of project entry. Client location will be defaulted to the program's CoC within a workfle Client Location: CA-510 - Turlock/Modesto/Stanislaus County CoC * Health Insurance - Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance status Covered by Health Insurance:* Yes * * Opficial Last Insurance Status Covered by Health Insurance No * * Yes * <td></td> <td></td> <td>Assessment Date:*</td> <td>04/04/2017</td> <td></td> <td></td> <td></td> <td></td> <td></td> | | | Assessment Date:* | 04/04/2017 | | | | | |
| Assessment Type:* During Program Enrollment * Assessment Type:* Lynnell Fuller Program: SHP Client Location - Select or enter the CoC code assigned to the geographic area where the head of household is staying at the time of project entry. Client location will be defaulted to the program's CoC within a workflor Client Location: CA-510 - Turlock/Modesto/Stanislaus County CoC * 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 Private Pay Health Insurance.** Yes Private Pay Health Insurance Program SCHIP No - SELECT - Veter children's Health Insurance Program SCHIP No - SELECT - Veter children's Health Insurance Program SCHIP No - SELECT - Veter children's Health Insurance Vetores Medicaid No No - SELECT - Veter children's Health Insurance Vetole RA No Health Insurance obtained through COBRA No No - SELECT - Keiter Public No | | | | | | | | | |
| Assessor:* Lynnell Fuller Program: SHP Client Location: SHP Client Location: CA-510 - Turlock/Modesto/Stanislaus County CoC • 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: * Ves * Other Converage * Private Pay Health Insurance: * Yes * SELECT - Medicaid No - SELECT - Veteraris Administration (VA) Medical Services No - SELECT - Conthered Children's Health Insurance Program SCHIP No - SELECT - Employee/Provided Health No - SELECT - Ghier Public No - SELECT - Health Insurance Otogram SCHIP No - SELECT - Ghier Public No - SELECT - Conthier Children's Health Insurance Vide/add Program No - SELECT - | | | 9 | | ram Enrollm | ent | v | | |
| Program: SHP Client Location - Select or enter the CoC code assigned to the geographic area where the head of household is staying at the time of project entry. Client location will be defaulted to the program's CoC within a workfld Client Location: CA-510 - Turlock/Modesto/Stanislaus County CoC • 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 A Reason No @ A Other Converage A Private Pay Health Insurance No • - SELECT - • • • • © Medicate No • - SELECT - • • • • © Veteraris Administration (VA) Medical Services No • • - SELECT - • • • • © Veteraris Administration (VA) Medical Services No • • - SELECT - • • • • © Employer-Provided Health No • • - SELECT - • • • © • The Public No • • - SELECT - • • • • © • The Public No • • - SELECT - • • • © • The Public No • • - SELECT - • • • © • State Funded Insurance Program S-CHIP No • • - SELECT - • • • © • The Public No • • - SELECT - • • • © • The Public No • • - SELECT - • • • © • State Funded Insurance for Adults (Medical) | | | | | | Q. | | | |
| Client Location - Select or enter the CoC code assigned to the geographic area where the head of household is staying at the time of project entry. Client location will be defaulted to the program's CoC within a workflor Client Location: CA-510 - Turlock/Modesto/Stanislaus County CoC • Health Insurance • Please indicate whether or not the client is ourcered by health insurance. If so, you will be able to record health insurance sources for the client. Covered by Health Insurance. If so, you will be able to record health insurance sources for the client. Covered by Health Insurance: * Yes • Type A Status* Reason No A Other Converage A Private Pay Health Insurance No • - SELECT - • • Medicate No • - SELECT - • State Children's Health Insurance Program S-CHIP No • Veteraris Administration (VA) Medical Services No • - SELECT - • Employer-Provided Health No • - SELECT - • State Children's Health Insurance Program S-CHIP No • State Children's Health Insurance Medical Bervices No • State Fundel Insurance of Adults (Medical) No • State Fundel Insurance of Adults (Medical) No • State Fundel Insurance of Adults (Medical) No • State Fundel Insurance Medicald Program No • State Fundel Insurance Medicald Program No • State Fundel Insurance (Medical) No • State Fundel Insurance Medicald Program No • State Fundel Insurance Medicald Program No • State Fundel Insurance (Medical) No • State Fundel Insurance (Medical) No • State Fundel Insurance Medicald Program No • State Fundel Insurance Medicald Program No • State Fundel Insurance (Medical) No • State Fundel Insurance (Medical) No • State Fundel Insurance (Medical) No • State Funde Insurance (Medical) No • State Fu | | | | - | 1 | ~ | × | | |
| Client Location: CA-510 - Turlock/Modesto/Stanislaus County CoC • Health Insurance - Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance status Covered by Health Insurance: * Yes • Type ^ Status* A Reason No * A Other Converage A Private Pay Health Insurance No • - SELECT - • • Image: Covered by Health Insurance Program S-CHIP No • - SELECT - • • Image: Covered by Health Insurance Program S-CHIP No • - SELECT - • • Image: Covered by Health Insurance Program S-CHIP No • - SELECT - • • Image: Covered by Health Insurance Program S-CHIP No • - SELECT - • • Image: Coverence Provided Health Insurance Program S-CHIP No • - SELECT - • • Image: Coverence Provided Health Insurance Program S-CHIP No • - SELECT - • • Image: Coverence Provided Health Insurance Program S-CHIP No • - SELECT - • • Image: Coverence Provided Health Insurance Program S-CHIP No • - SELECT - • • Image: Coverence Provided Health Insurance Program S-CHIP No • • - SELECT - • • Image: Coverence Provided Health Insurance Provided Health Insurance Provided Health Insurance Program Insure Provided Health Insurance Provided Health Insurance Provided Health Insurance Provided Health Insurance Provided Heropan Insure Overence Provided Health Insurance Provided Health Insurance Provided Heropan Insure Provided Heropan Insure Provided Health Insurance Provided Heropan Insure Provided Heropan Insure Provided Heropan Insure Proveten Provided Heropan Insure Proveten Provided | | | | | | | | | |
| Health Insurance - Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance status Covered by Health Insurance: * Yes • Type A Status* A Reason No @ A Other Converage A Private Pay Health Insurance: * Yes • • • Private Pay Health Insurance No • >SELECT - • • Medicare No • >SELECT - • • Medicare No • >SELECT - • • Veteraris Administration (VA) Medical Services No • >SELECT - • • Veteraris Administration (VA) Medical Services No • >SELECT - • • Health Insurance obtained through COBRA No • >SELECT - • • Other Public No • >SELECT - • • • • State Funded Insurance obtained through COBRA No • >SELECT - • • • • • • • • • • • • • • • • | Client Location - Select or enter the | CoO | code assigned to the geographic area whe | ere the head of | household is a | stayi | ing at the time of project entry. Client lo | ecation will be defaulted to the progra | am's CoC within a workflow. |
| Default Last Insurance Status Covered by Health Insurance: * Yes Type A Status* A Reason No @ A Other Converage A Private Pay Health Insurance No • - SELECT - • • Ø Medicare No • - SELECT - • • Ø Medicare No • • - SELECT - • • Ø State Children's Health Insurance Program S-CHIP No • • - SELECT - • • Ø Veteran's Administration (VA) Medical Services No • • - SELECT - • • Ø Veteran's Administration (VA) Medical Services No • • - SELECT - • • Ø Temployer-Provided Health No • • - SELECT - • • Ø Other Public No • • - SELECT - • • Ø State Fundel Insurance for Adults (Medical) Yes • Ø Combined Children's Health Insurance / Medicald Program No • • - SELECT - • • Ø Indian Health Service (IHS) No • • - SELECT - • • Ø | | | Client Location: | CA-510 - Tu | rlock/Modes | to/S | Stanislaus County CoC 🔹 | | |
| Default Last Insurance Status Covered by Health Insurance: * Yes Type A Status* A Reason No @ A Other Converage A Private Pay Health Insurance No • - SELECT - • • Ø Medicare No • - SELECT - • • Ø Medicare No • • - SELECT - • • Ø State Children's Health Insurance Program S-CHIP No • • - SELECT - • • Ø Veteran's Administration (VA) Medical Services No • • - SELECT - • • Ø Veteran's Administration (VA) Medical Services No • • - SELECT - • • Ø Temployer-Provided Health No • • - SELECT - • • Ø Other Public No • • - SELECT - • • Ø State Fundel Insurance for Adults (Medical) Yes • Ø Combined Children's Health Insurance / Medicald Program No • • - SELECT - • • Ø Indian Health Service (IHS) No • • - SELECT - • • Ø | Health Insurance - Please indicate | whet | her or not the client is covered by health ins | surance If so a | you will be able | e to i | record health insurance sources for the | client | |
| Covered by Health Insurance.* Yes Type A Status* A Reason No M A Other Converage A Private Pay Health Insurance No - SELECT - Image: A A A A A A A A A A A A A A A A A A A | read instance include include | | ner of not the elicit is covered by neukinik | ourunee. Ir oo, | | | | - chent. | |
| Type ▲ Status* ▲ Reason No ♥ ▲ Other Converage ▲ Private Pay Health insurance No ● - SELECT - ● ● Medicare No ● - SELECT - ● ● Medicard No ● - SELECT - ● ● State Children's Health Insurance Program S-CHIP No ● - SELECT - ● ● Veterar's Administration (VA) Medical Services No ● - SELECT - ● ● Employer-Provided Health No ● - SELECT - ● ● Health Insurance obtained through COBRA No ● - SELECT - ● ● Other Public No ● - SELECT - ● ● ● Combined Children's Health Insurance / Medicald Program No ● - SELECT - ● ● Combined Children's Health Insurance / Medicald Program No ● - SELECT - ● ● Combined Children's Health Insurance / Medicald Program No ● - SELECT - ● ● Indian Health Service (IHS) No ● - SELECT - ● ● | | | | | | t Ins | urance Status | | |
| Private Pay Health Insurance No - SELECT - State Medicare No - - SELECT - State Medicare No - - SELECT - State State Children's Health Insurance Program S-CHIP No - - SELECT - State Veteraris Administration (VA) Medical Services No - - SELECT - State Employer-Provided Health No - - SELECT - State Thealth Insurance obtained through COBRA No - - SELECT - State Other Public No - - SELECT - State State Funded Insurance for Adults (Medical) Yes State State Combined Children's Health Insurance / Medicald Program No - - State State State State | | | Covered by Health Insurance:* | Yes | • | | | | |
| Private Pay Health Insurance No - SELECT - Medicare No - SELECT - Medicare No - SELECT - Medicare No - SELECT - State Children's Health Insurance Program S-CHIP No - SELECT - Veteran's Administration (VA) Medical Services No - SELECT - | | | Type . | | Status* 🔺 | | Reason No 🤨 🛦 | Other Converage | |
| Medicare No - SELECT - Medicaid No - - SELECT - State Children's Health Insurance Program S-CHIP No - - SELECT - Vetrards Administration (VA) Medical Services No - - SELECT - Employer-Frovided Health No - - SELECT - Health Insurance obtained through COBRA No - - SELECT - Other Public No - - SELECT - State Funded Insurance for Adults (Medical) Yes - | | | | | | | | - | 0 |
| Medicaid No - SELECT - State Children's Health Insurance Program S-CHIP No - SELECT - Veterar's Administration (VA) Medical Services No - SELECT - Employee: 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 / MedicaldProgram No - SELECT - Indian Health Service (IHS) No - SELECT - | | | Medicare | | No | ٠ | SELECT | • | 0 |
| Veterar's Administration (VA) Medical Services No - SELECT - Image: Complex | | | Medicaid | | No | ۲ | SELECT | | |
| Employer-Provided Health No - SELECT Health insurance obtained through COBRA No - >SELECT Other Public No - >SELECT | | | State Children's Health Insurance Program S | CHIP | No | • | SELECT | • | 0 |
| Health insurance obtained through COBRA No - SELECT - Image: Comparison of the public No - SELECT - Image: Comparison of the public of the publ | | | Veteran's Administration (VA) Medical Servic | ces | No | • | SELECT | • | 0 |
| Other Public No - SELECT Image: Combined Children's Health Insurance for Adults (Medicai) Yes Image: Combined Children's Health Insurance / Medicaid Program No - SELECT Image: Combined Children's Health Insurance / Medicaid Program No - SELECT Image: Combined Children's Health Insurance / Medicaid Program No - SELECT Image: Combined Children's Health Insurance / Medicaid Program No - SELECT Image: Combined Children's Health Insurance / Medicaid Program No - - Second Program Image: Combined Children's Health Insurance / Medicaid Program No - - Second Program Image: Combined Children's Health Insurance / Medicaid Program No - - Second Program Second Program< | | | Employer-Provided Health | | No | • | SELECT | • | 0 |
| State Funded insurance for Adults (Medical) Yes <th< th=""> <!--</td--><td></td><td></td><td>Health Insurance obtained through COBRA</td><td></td><td>No</td><td>•</td><td> SELECT</td><td>•</td><td>0</td></th<> | | | Health Insurance obtained through COBRA | | No | • | SELECT | • | 0 |
| Combined Children's Health Insurance / Medicaid Program No - - SELECT - + Image: Second | | | Other Public | | No | • | SELECT | • | 0 |
| Indian Health Service (IHS) No T - SELECT T | | | State Funded Insurance for Adults (Medical) |) | Yes | ۲ | | | 0 |
| Indian Health Service (IHS) No • SELECT - • | | | Combined Children's Health Insurance / Med | dicaid Program | No | ٠ | SELECT | • | 0 |
| | | | | | | | | | |
| | | | Other | | No | | | | |
| No insurance No Y SELECT Y | | | No insurance | | | | | | |
| | | | | | | | ι | | |
| | | | | | | | | | 惧 s |
| | | | _ | | | | |
|----------|---------------------------------------------------------------------------------------|--------------------|----------------------------------------|-----------------------------------|-------------------------------------------------------|-------------------------------------------------|------------|
| (E) U | niversal Data Assessment 🕨 SOAR (| Connection 🕨 🚆 | Barriers | | | 📰 🚯 🗱 📲 | 10 |
| Use t | his form to identify whether a client ds or click View Barrier History to r | has each individ | ual barrier or not. The Clients last a | assessment is displayed as a defa | ult. You may, optionally, click Previous Barri | ers Detail to view information about the defaul | ted |
| recor | us of click view barrier history to h | eview all previous | s barrers. | | | | |
| | | | | | | V≣ View Barrie | er History |
| | | | | | | | a motory |
| ssessi | ment Active | | | | | | |
| | | | Identified Date: 10/02/20 | 19 | | | |
| | | | Screen: Special N | leeds • | | | |
| | | Dis | sabling Condition: Yes | Y | | | |
| | | | | | | | |
| | | | | | | | |
| | Barrier 🗠 | Help 📥 | Barrier Present?* 🔺 | Condition is Indefinite 🔺 | Explanation 🔺 | Previous Barrier Details | |
| / | Alcohol Abuse | 0 | No | | | Previous Barrier | 6 |
| Z | Chronic Health Condition | 0 | No | | | Previous Barrier | S |
| | Developmental Disability | 0 | No 🔻 | | | Previous Barrier | Ø |
| | Drug Abuse | 0 | No 🔻 | | | Previous Barrier | ß |
| | HIV/AIDS | 0 | No 🔻 | | | Previous Barrier | Ø |
| | Mental Illness | 0 | Yes 🔹 | Yes 🔹 | | Previous Barrier | ଜ |
| | Physical Disability | 0 | Yes 🔹 | Yes 🔹 | | Previous Barrier | Ø |

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

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

| 🔆 Universal Data Assessment 🕨 SOAR Connection 🕨 🕂 D | omestic Violence | Assessment | 20 |
|------------------------------------------------------------------|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|
| If the client has been a victim of domestic violence, select Yes | s for Domestic Viole i | ce Experience, and select when the experience occurred. Clicking this button will fill in default information from the selected client's most recent assess Default Client's Last Assessment @ | hent. |
| Assessment Active | | | |
| Asse Domestic Violenc | e Experience :* 0 | 0/02/2019 🗐 9 Yes 9 No 9 Client Now 9 Client refused 9 Data Not Collected | |

Income Sources & Non-Cash Benefits

| 🤆 u | niversal Data Assessment 🕨 Domestic Violence Assessment 🕨 🕂 Ind | come and Sources, Non-Cash | Benefits | | 🔄 😰 🚯 👔 🚔 🛜 |
|--------|-----------------------------------------------------------------|----------------------------|---------------|---|------------------------------|
| | | | | | (in 2010aro a 012100 annoa). |
| | | Default Las | t Assessment | | |
| Assess | ment Active | | | | |
| | | | | | |
| | Assessment Date: | * 04/04/2017 🛄 | | | |
| | Income from Any Source: | *Yes 🔻 🥹 | | | |
| | Non-Cash Benefits from Any Source | | | | |
| | Expenses | SELECT 🔹 🤍 | | | |
| | | | | | |
| Income | | | | | |
| | | | | | |
| | Туре 🛥 | | Description 🔺 | | Monthly Amount 🛋 |
| | Earned Income | | | | |
| | Unemployment Insurance | | | | |
| | Supplemental Security Income | | Sam \$600.00 | | \$600.00 🔊 |
| | Social Security Disability Income | | | | |
| | Private Disability Insurance | | | | |
| | Worker's Compensation | | | | |
| | VA Service-Connected Disability Compensation | | | | |
| | VA Non-Service-Connected Disability Pension | | | | |
| | Pension or retirement income from a previous job | | | | |
| | TANF | | | | \$400.00 🦃 |
| | General Assistance | | | | |
| | Retirement (Social Security) | | | | |
| | Child Support | | | | |
| | | Count/Total Monthly Income | | 2 | |
| | | | | | Kave 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**

| | Active | |
|---|-----------------------------|---|
| | | |
| (| PATH Street Outreach | 1 |
| | Add Household Member | - |
| | Associated Assessments | |
| | Exit the Enrollment | |
| | / Edit Enrollment | - |
| | Edit Project Entry Workflow | _ |
| | 🔶 Link Assessments | |
| | Review Entry Assessments | |
| | Update/Annual Assessment | |
| | | |

Enrollment Assessment: No changes with the Enrollment

| desto Testing - ClientTrack 15 - Go ttps://usw.clienttrack.net/15/h | | | - | | | | | 0 |
|------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|
| ClientTrack~ Clie | ents % All Sear | ch | Q | | | | | Retty Estrada (Training) Help Sign C |
| Ken Paul 3/13/1980 Male | 10585 A | | | | | | | |
| Assessment For | 🐣 Ken Raul's Dashbor | and a second second | am Enrollment | | | | | 🗟 🕢 at 🖨 1 |
| Enrollment " × | Select the Project you | are enrolling the client in | to. ClientTrack will | display a list of clients in the clie | nt's family. Please select all the clie | ents you are enrolling. | | |
| Enrollment | for Emergency Shelt as necessary without for Safe Havens and for all types of Perm 1) Information provide though all documenta 2) The client has indic 3) The client is able to for all other types of | rojects – it is the date o ers – it is the night the c exiting and restarting fr Transitional Housing – anent Housing, includin d by the client or from th tion may not yet hav ated they want to be Or access services and Du | lient first stayed in or each stay for a s it is the date the cli g Rapid Re-Housin he referral indicates hy projects with is to the large nu | the shelter for the consecutive sh pecified period. ent moves into the residential pro- g = it is the date following applica- they meet the criteria for admiss a valid HMIS Project Type app mber of conditional data coli | oject (i.e. first night in residence). ation that the client was admitted in sion (for example if chronic homele pear here. ection elements it is not possib | to the project. To be admitted sames is required the client in ole to change a project onc | a bed-night tracking method will have a projec indicates the following factors have been met dicates they have a serious disability and hav e the enrolliment record has been create d. The project field can be changed wh | t. e been homeless long enough to qualify – d. |
| | provision of service. | | | | TANF/Motel Vouchers | | | |
| | Household - Excerpt from would live together in on | o the HMIS Data Standard e dwelling unit if they we Gender a | Is Manual "A house re housed)." Age | Project | case Manager 😻 🔺 | to a continuum project for assi | stance and who live together in one dwelling in Relationship to | unit (or, for persons who are not housed, wh |
| | Paul, Ken | Male | 39 | Start Date = 10/24/2014 | Lynnell Fuller | 0 | Head of Household" a | • |
| | | | | | | | | |
| | | | | | | | | |

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



The system will give you the warning: ⁽¹⁾ 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.

| Assessment For Enrollment (1263) * × Enrollment Southern, Kelvin Michael New or Update Exis Type of Assessment Annual Assessment | Universal Data Assessment Please address the following: The assessment date is out side the 60 day window of the annual assessment. Kelvin Michael Southern 's Anniversary date is 10/2. Setting an anniversary of cause data quality and reporting errors. Complete the information below related to the selected client's housing status and other relevant information. Netr Elecause 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. Shanging any project setup data with existing enrollments may affect or treak the logic for 3.917. Station and the address of changed setup data or mising enrollments may affect or treak the logic for 3.917. | date outside the 60 day window may |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|
| - | | You should stop your workflow X |
| | Default Last Insurance Status Covered by Health Insurance * Yes Type A Status* A Reason No ® A Other Coverage A Private Pay Health Insurance No + -SELECT - • Medicare No + -SELECT - • Veteraris Administration (VA) Medical Services No + -SELECT - • | |

Updating Existing Assessment

Go through the same process starting at the Blue Action Arrow



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

| 🗧 🔍 Find Assessment | | | | 📮 🗈 🗶 🖷 🚍 |
|---------------------|---------------------------|--------------------------|---------------|------------|
| Find Assessment | | | | |
| | | Type:SELECT | | Search |
| | | 4 results found. | | |
| 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

| | | Default Client's La | ast Assessment 🥹 | | |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|----------------------------------------------------------------------|-----------------------|--|
| | Universal Data Assessment* 10/02/ Information Date: | 2019 🛄 | | | |
| | Age while in project: 57 | | | | |
| | Assessment Type: During | Program Enrollmen | t v | | |
| ocation - Select or e | iter the CoC code assigned to the geographic area where the he | ad of household is sta | ying at the time of project entry. | | |
| | Client Location :* CA-510 | - Turlock/Modesto | /Stanislaus County CoC 🔻 | | |
| | | | | | |
| Insurance - Please in | dicate whether or not the client is covered by health insurance. | f so, you will be able to | precord health insurance sources for the | client. | |
| | | Default Last In | surance Status | | |
| | Covered by Health Insurance:* Yes | • | | | |
| | | | | | |
| | 🗌 Type 🛋 | Status* 🔺 | Reason No 🧐 🔺 | Other Coverage 🔺 | |
| | Private Pay Health Insurance | No 🔻 | - SELECT | • | |
| | Medicare | No 🔻 | - SELECT | · 🔊 | |
| | Medicaid | No 🔻 | - SELECT | n 🔊 | |
| | | | | | |
| | State Children's Health Insurance Program S-CHIP | No 🔻 | SELECT | <u>م</u> | |
| | State Children's Health Insurance Program S-CHIP Veteran's Administration (VA) Medical Services | | SELECT | | |
| | | No 🔻 | | ø | |
| | Veteran's Administration (VA) Medical Services | No • | SELECT | ନ ଜ ଜ | |
| | Veteran's Administration (VA) Medical Services Employer-Provided Health | No • No • No • | - SELECT | ମ ମ ମ | |
| | Veteran's Administration (VA) Medical Services Employer-Provided Health Health Insurance obtained through COBRA | No • No • No • | - SELECT - SELECT - SELECT - SELECT | ମ ମ ମ | |
| | Veteran's Administration (VA) Medical Services Employer-Provided Health Health Insurance obtained through COBRA Other Public | No • No • No • Yes • | - SELECT - SELECT - SELECT - SELECT | 9 9 9 9 | |
| | Veteran's Administration (VA) Medical Services Employer-Provided Health Health Insurance obtained through COBRA Other Public State Funded Insurance for Adults (Medical) | No No No Yes Yam No | - SELECT | 9 9 9 9 9 | |
| | Veteran's Administration (VA) Medical Services Employer-Provided Health Health Insurance obtained through COBRA Other Public State Funded Insurance for Adults (Medical) Combined Children's Health Insurance / Medicald Pro | No No No No Ves variant No No Ves | - SELECT - • • - SELECT - • • - SELECT - • • - SELECT - • • | 0 0 0 0 0 | |

Barriers

| | niversal Data Assessment SOAI | | Barriers | Clients last asse | ssment is displayed as a d | efault. You may i | optionally click Previous Barrie | いい 「 「 | |
|---------|--------------------------------------|--------|------------------------|-------------------|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|--------------------------|-----------|
| | s or click View Barrier History to r | | | | | , autoritation and the second s | phonany, onon the barrier | | |
| | | | | | | | | 0≣ View Barrier | History |
| Assessm | ent Active | | | | | | | | |
| | | | Identified Date:* | 10/02/2019 | n | | | | |
| | | | Screen: | Special Need | s 🔹 | | | | |
| | | Dis | abling Condition: | Yes | Ŧ | | | | |
| | | | | | | | | | |
| | Barrier 🗠 | Help 📥 | Barrier Present?* 🔺 | | Condition is Indefinite | | Explanation 🔺 | Previous Barrier Details | |
| e 📝 | Alcohol Abuse | 0 | No | • | | | | Previous Barrier | Ø |
| v 📝 🛛 | Chronic Health Condition | 0 | No | • | | | | Previous Barrier | \$ |
| e 📝 🛛 | Developmental Disability | 0 | No | • | | | | Previous Barrier | Ø |
| e 🍞 | Drug Abuse | 0 | No | • | | | | Previous Barrier | ത |
| e 📝 🛛 | HIV/AIDS | 0 | No | • | | | | Previous Barrier | ത |
| 🗷 💙 | Mental Illness | 0 | Yes | • | Yes | • | | Previous Barrier | ത |
| e 📝 🛛 | Physical Disability | 0 | Yes | • | Yes | • | | Previous Barrier | Ø |

Domestic Violence

| Find Assessment + Master Assessment + / Domestic Violence Assessment | | 🔄 🚯 👔 💼 |
|---------------------------------------------------------------------------------------------|--------------------------------------------------|---------|
| If the client has been a victim of domestic violence, select Yes for Domestic Violence Expe | rience, and select when the experience occurred. | |
| Assessment Active | | |
| Assessment Date:* Domestic Violence Experience :* | | |

Income Sources & Non-Cash Benefits

| Source Assessment > Domestic Violence Assessment > // Income and Source | es, 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: | |
| Income received by or on behalf of a minor child should be recorded as part of hou client-level for heads of household and adult household members. Projects may cl requirements. Projects collecting data through client interviews should ask clients income data should be recorded only for sources of income that are current as of the sources of income that are current as of the sources of income that are current as oft and income that are current as oft and the sources of income that are current as oft and income that are current as oft and the sources of income that are current as oft and income the sources of income that are current as oft and income that are current as oft and and are current as oft and income the sources of the sources of income that are current as oft and income the sources of the sources of income that are current as oft and income the sources of the sources of | d be recorded for both the overall income question and the specific source, and the income amount should be estimated. d be recorded for both the overall income question and the specific source, and the income amount should be estimated. d be recorded at the device of the source of income should be recorded at the occes to collect this information for all household members including minor children, as long as this does not interfere with accurate reporting per funder whether they receive income they receive. e 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 reample, if a client's molyoment has been terminated and the client has not yet secured reample, if a client's molyoment has been terminated and the client is currently lient has at the time data are collected (i.e. 20 hours at \$12.00 an hour). |
| Assessment Active | |
| | |

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 Dertemined, Client became enrollmed in PATH. DO NOT CHANGE PROJECT START DATE; You will then go through the entire workflow.

| Intake (2298) | 🗧 🖊 HUD Program Enrollment 🔤 🕃 🏭 | 2 |
|-----------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|
| н х | 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. | |
| Basic Client Information Family Members Program Enrollment | 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 dayed 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-ent as necessary without * outrog and the using — 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 Rel-Housing – It is the date file date the client moves into the residential project (i.e. first night in residence). • for all types of Permanent Housing, Including Rapid Rel-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 of nom the referal 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 - hough all documentation may nove thave been gamened; 2) The client thas indicated they want to be housed in this project. 3) The client thas indicated they want to be housed in this project. 3) The client thas indicated they want to be housed in this project. 4) The client thas indicated they want to be housed in this project. 4) The client thas indicated they want to be housed in this project. 4) The client thas be accesses 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 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 a | |
| | Project.* PATH Street Outreach 🤎 | |
| | Household - Except 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, would live together in one dwelling unit if they were housed)." | who |
| | Name ▲ Gender ▲ Age ▲ Project Start/Date ▲ Case Manager ● ▲ Relationship to Head of Household" ▲ Date of Household" ▲ Date PATH Status Determined ▲ Client became noted of to enrolled in PATH ▲ ✓ Bourne, Jason Charles Male 47 10/24/2017 Patty Estrada Q Self Image: Pathogenetic Action of Action Ac | ø |

View and Edit Master Assessment

Select Menu>Case Management>Assessments

| Clients | + | ClientTrack™ 📫 | All Search | ٩ | | A vleigh |
|-----------------------|---|----------------------------------|-----------------------------------------|-----------------------------------------------------------|--------------------------------|-----------------|
| C Find Client | | Kelvin Southerr | 11697 | | | |
| | | E 🛧 🔍 Master Assessi | nents | | | |
| CASE MANAGEMENT | | Below is a list of Master Assess | ments that have been created for this c | lient. Please use the HMIS workflows to add or edit asses | sments. | |
| Client Dashboard | | | | | | |
| 🚴 Edit Client | > | | | | ts found. | |
| Tiving Situation | | Date | Program PATH Street Outreach | Type 🔺 During Program Enrollment | Assessor ▲ Kayleigh Partain | Comments 🔺 |
| C Enrollments | | 0 10/02/2019 | PATH Street Outreach | Entry | Kayleigh Partain | |
| Assessments | > | | | | | |
| 📑 Case Notes | | | | | | |
| Referrals | > | | | | | |
| Carly Members | > | | | | | |
| Services | > | | | | | |
| 🍇 Veteran Information | | | | | | |

Click on the Blue Action Arrow and select View Related Assessments



| 🗧 1/6/2020 During Program Enrollment 🕨 Assessment Status 🕨 🦯 Domestic Violence | 2 Assessment |
|--------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| If the client has been a victim of domestic violence, select Yes for Domestic Violence Experie | ence, and select when the experience occurred. |
| | |
| Assessment Active | \frown |
| Assessment | |
| Domestic Violence Experi | ierce :* © Yes ® No |
| | Client doesn't know Client refused |
| | Data Not Collected |
| | |
| | |
| | |
| | |
| | I Save |
| Make sure you save any changes you might | havo mada |
| wake sure you save any changes you might | |
| | |
| | 🝞 Edit Assessment |
| Or you can use the Edit Assessment button t | o get to the Universal Data Assessment |
| | |
| | |
| 1/6/7020 During Program Enrollment Assessment Status Displayed below is the status of the Assessment. | |
| Displayed below is the status of the Assessment. | |
| | 12 Edit Assessment |
| | Assessment Finished |
| | Convests Violence Financial |
| | MAIS Barriers |
| | |
| | |
| Universal Data Assessment | |
| | |
| 1/6/2020 During Program Enrollment Assessment Status Assessment Status Assessment Status Assessment 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 🔤 During Program Enrollment • |
| | CHSS TANF/Motel Vouchers |
| Assessor:* | Patty Estrada 🔍 |
| Comments - If you have any other comments or notes regarding this assessment, please enter them below | M. |
| 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 form your project in ClientTrack.**Workspace>Client Record/Dashboard>Blue Action Arrow on the Enrollment you want to Exit>**

| | Ken's Enrollments | |
|---|-----------------------------------------------------------------------|---------------------------|
| | Enrollment Description | Active Househo Members |
| | a Active | |
| | Emergency shelter | |
| | CHSS TANF/Motel Vouchers | 1 |
| | Add Household Member | |
| | Associated Assessments | |
| | | |
| < | Exit the Enrollment | Constant |
| < | Exit the Enrollment | Service |
| < | | Service |
| < | | Service |
| < | Edit Enrollment | Service |
| < | Delete Enrollment Edit Enrollment Edit Project Entry Workflow | Service |

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

| То | exit the client from the Enrollment, enter the Exit Date and Destination. | | | | | | | | |
|-------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|--------------------------------------------------------------------------------------|---------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------|
| | | nation:* [eason: [nment: [| 01/07/2020 📑 Rental by client wit Completed Program -ynnell Fuller 🤨 Z 🕫 | th RRH or equivalent | subsidy | | | | • |
| Servi | laga | | | | | | | | |
| Servi | ices | | | | | | | | |
| | | Family Inco | | | | | | | |
| | | | | Family Members | | | | | |
| | | \$0.00 | \$0.00 | 1 | \$1,040.83 | 0.00 % | | | |
| | Service | Date:* | 01/07/2020 🛅 | | | | | | |
| | | | | | | | | | |
| | | | - SELECT | • | | | | | |
| | | Grant: | - SELECT | • S TANF/Motel Vouc | hers 🔻 | | | | |
| | | Grant: | - SELECT | S TANF/Motel Vouc | | | | | |
| | Enrol | Grant: | - SELECT | S TANF/Motel Vouc 47 results found | | | Holte* + | Linit Voluoti e | Total |
| | Enrol | Grant: | - SELECT | S TANF/Motel Vouc | Unit Type 🔺 | | Units' 🔺 | Unit Value* 🔺 | |
| | Enrol | Grant: | - SELECT | S TANF/Motel Vouc | Unit Type ▲ Count ▼ | | 1.00 | \$0.00 | \$0.0 |
| | Enrol Service* & Case management services | Grant: | - SELECT | S TANF/Motel Vouc | Unit Type ▲ Count ▼ | | | | \$0.0 \$0.0 |
| | Enrol Service* == Child care | Grant: | - SELECT | S TANF/Motel Vouc | Unit Type 🔺 Count 🔹 Dollars 🔹 | | 1.00 1.00 1.00 | \$0.00 \$0.00 | \$0.0 \$0.0 \$0.0 |
| | Enrol Service* a. Colid care Consumer Life Skills/Advocacy | Grant: | - SELECT | S TANF/Motel Vouc | Unit Type A Count V Dollars V Count V | Ŧ | 1.00 1.00 1.00 | \$0.00 \$0.00 \$0.00 | \$0.0 \$0.0 \$0.0 \$0.0 |
| | Enrol Service* = Case management services Child care Consume: Life Shills/Advocacy Criminal Justice.Legal Service | Grant: | - SELECT | S TANF/Motel Vouc 47 results found | Unit Type A Count V Dollars V Count V Count V | 1 | 1.00 1.00 1.00 1.00 | \$0.00 \$0.00 \$0.00 \$0.00 | \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 |
| | Enrol Service* & Case management services Child care Consume Life Skills/Advocacy Criminal Justice/Legal Service Day Care | Grant: | - SELECT | S TANF/Motel Vouc 47 results found | Unit Type ▲ Count ▼ Dollars ▼ Count ▼ Count ▼ Count ▼ | 1 | 1.00 1.00 1.00 1.00 1.00 1.00 | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 | \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 |
| | Enrol Service* a. Case management services Child care Consimer Life Skills/Advocacy Criminal Justice/Legal Service Do you have any pets? If yes, number and dogs or cats? | Grant: | - SELECT | S TANF/Motel Vouc 47 results found | Unit Type ▲ Count ▼ Dollars ▼ Count ▼ Count ▼ Count ▼ Count ▼ | 3 | 1.00 1.00 1.00 1.00 1.00 1.00 1.00 | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 | \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 |
| | Enrol Service* Case management services Colid care Consumer Life Shills/Advocacy Criminal Justice Legal Service Day Care Do you have any pets? If yes, number and dogs or cats? Education | Grant: | - SELECT | S TANF/Motel Vouc 47 results found | Unit Type A Count V Dollars V Count V Count V Count V Count V Count V | 3 | 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 | \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 |
| | Enrol Service* a. Case management services Child care Consume Life Skills/Advocacy Ciminal Justice/Legal Service Day Care Day Care Day Care Education have any pets? If yes, number and dogs or cats? Educational assistance Educational assistance | Grant: | - SELECT | S TANF/Motel Vouc | Luit Type A Count V Dollars V Count V Count V Count V Count V Count V Count V | ł | 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 | \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 |
| | Errol Service* Service* Case management services Child care Consumer Life Skills/Advocacy Criminal Justice/Legal Service Do you have any pets? If yes, number and dogs or cats? Education Education Education al skiltance Emergency housing assistance | Grant: | - SELECT | S TANF/Motel Vouc | Unit Type & Count V Dollars V Count V Count V Count V Count V Count V Count V Dollars V | 3 | 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 | Total \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 \$0.0 \$0. |

- #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.

| ete the information below related to the s | selected client's housing status and other relevant informa | ition. | | | | #1 | |
|-------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------|------------|--|
| | | | | | | # 1 | |
| Changing any project setup data w | lata entry as described in the Data Dictionary, the Default 1 vith existing enrollments may affect or break the logic for 3 pected. because of changed setup data or missing require | 3.917. | n will not bring in any 3.917 di | ata. | | | |
| | | Default Client's La | ist Assessment 🥑 🧲 | | | | |
| | Assessment Date:* 01/07/2020 | | | | | | |
| | Age at Assessment: 39 | | | | | | |
| | Assessment Type:* Exit | ٣ | | | | | |
| | Assessor:* Patty Estra | da 🔍 | | | | | |
| | Program: CHSS TANK | /Motel Vouchers | Ŧ | | | | |
| wanes. Places indicate whether or net | the client is covered by health insurance. If so, you will be | able to record bealth in | ouronoo oourooo for the olion | • | | | |
| | Covered by Health Insurance:* | Default Last Ins | surance Status | _ | | | |
| | Covered by Health Insurance:* - SELECT - | | Reason No 🥑 🔺 | Other 89 | felsős 👻 | | |
| | | ▼ Status ▲ | \sim | | ^{teraņe} ▲ #2 | 1 | |
| | 🔲 Туре 🛦 | Status 🔺 | Reason No 🤨 🔺 | Other Oc | #180° * #2 | 1 | |
| | Type Private Pay Health Insurance | Status ▲ - SELECT - ▼ - SELECT - ▼ | Reason No 🕑 🔺 | Other de | #2 |] | |
| | Type Private Pay Health Insurance Medicare | Status A - SELECT - V - SELECT - V - SELECT - V | Reason No 🗑 🔺 | Other See | #2 |] | |
| | Type A Private Pay Health Insurance Medicare Medicald | Status ▲ - SELECT - ▼ - SELECT - ▼ - SELECT - ▼ - SELECT - ▼ - SELECT - ▼ | Reason No 🕑 🔺 | Other See | #2 |] | |
| | Type Private Pay Health Insurance Medicare Medicare State Children's Health Insurance Program S-CHIP | Status A - SELECT - V - SELECT - V - SELECT - V - SELECT - V - SELECT - V | Reason No | Other See | #2 |] | |
| | Type * Private Pay Health Insurance Medicate Medicate State Children's Health Insurance Program SCHIP Veteraris Administration (VA) Medical Services | Status A - SELECT - V - SELECT - V | Reason No 🖗 🔺 - SELECT - SELECT - SELECT - SELECT - SELECT - SELECT - SELECT - SELECT | Other See | #2 |] | |
| | Type A Private Pay Health Insurance Medicare Medicare State Children's Health Insurance Program S-CHIP Veteran's Administration (VA) Medical Services Employee-Provided Health Health Insurance obtained through COBRA Other Public | Status A - SELECT - V - SELECT - V | Reason No + - - SELECT - | Othel See | #2 |] | |
| | Type A Private Pay Health Insurance Medicare Medicale Medicale State Children's Health Insurance Program S-CHIP Veteran's Administration (VA) Medical Services Employee-Provided Health Health Insurance Obtained through COBRA Other Public State Funded Insurance for Adults (Medical) | Status A - SELECT - V - SELECT - V | Reson No + A - SELECT - - SELECT - | Othel See | #2 |] | |
| | Type * Private Pay Health Insurance Medicare Medicare Medicare State Children's Health Insurance Program S-CHIP Veterans Administration (Va) Medical Services Employee-Provided Health Health Insurance obtained through COBRA Other Public State Funded Insurance for Adults (Medical) State Funded Insurance for Adults (Medical) Combined Children's Health Insurance / Medical Pro | Status A - SELECT - ¥ - SELECT - ¥ | Reason No | Othel See | #2 |] | |
| | Type A Private Pay Health Insurance Medicare Medicare Medicare State Children's Health Insurance Program S-CHIP Veteraris Administration (VA) Medical Services Employee-Provided Health Health Insurance obtained through COBRA Other Public State Funded Insurance for Adults (Medical) Combined Otherer Shealth Insurance / Medicald Pro Indian Health Service (HS) | Status A - SELECT - V - SELE | Reason No | 00781 544 V V V V V V V V V | #2 |] | |
| | Type * Private Pay Health Insurance Medicare Medicare Medicare State Children's Health Insurance Program S-CHIP Veterans Administration (Va) Medical Services Employee-Provided Health Health Insurance obtained through COBRA Other Public State Funded Insurance for Adults (Medical) State Funded Insurance for Adults (Medical) Combined Children's Health Insurance / Medical Pro | Status A - SELECT - " - SELECT - " | Reason No | 00781 544 V V V V V V V V V | #2 |] | |

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

| Identified Date | e:* 10/02/201 | 19 🔳 |
|---------------------|---------------|----------|
| Screen | n: Special Ne | eeds 🔹 |
| Disabling Condition | n: Yes | Ψ. |
| | | |
| Barrier | | Conditio |

| Barrier 🛆 | Help 🔺 | Present?* 🔺 | | Indefinite 🔺 | Explanation 🔺 | Previous Barrier Details | |
|--------------------------|--------|-------------|---|--------------|---------------|--------------------------|---|
| Alcohol Abuse | 0 | No | • | | | Previous Barrier | 6 |
| Chronic Health Condition | 0 | No | ۲ | | | Previous Barrier | 6 |
| Developmental Disability | 0 | No | ۲ | | | Previous Barrier | Ø |
| Drug Abuse | 0 | No | • | | | Previous Barrier | ത |
| HIV/AIDS | 0 | No | • | | | Previous Barrier | 6 |
| Mental Illness | 0 | Yes | ۲ | Yes 🔹 | | Previous Barrier | Ø |
| Physical Disability | 0 | Yes | ۲ | Yes 🔹 | | Previous Barrier | 6 |

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.

| E | « Universal Data Assessment 🕨 SOAR Connection 🕨 | + Income and Sc | urces, Non-Cash Bene | efits | | | 🔄 💽 🚯 🛃 🚔 |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| Inc | licate below the client's sources of monthly income, n | on-cash benefits and e | kpenses. | | | | |
| Th | e following instructions are quoted from the HMIS Dat | ta Manual: | | | | | |
| | When a client has income, but does not know the existing the existing of a minor child a lincome should be recorded at the client-level for this does not interfere with accurate reporting per asking them to state the sources of income they round a should be recorded only for sources. client has not yet secured additional employment, full time for \$15.00/hour, but the client is currently | should be recorded as p heads of household and funder requirements. I eceive. of income that are curr the response for Earne | art of household income J adult household membe projects collecting data the ent as of the information d income would be "No." week for \$12.00 an hour, in the second second second second second second the second second second second second second the second second second second second second second the second second second second second second second second the second | under the Head of Hous ers. Projects may choos hrough client interviews date (i.e. have not been As a further example, if record the income from | ehold, unless the federal funder e to collect this information for should ask clients whether they specifically terminated). As an o a client's most recent paycheck | in the HMIS Program Specific Manual ins all household members including minor of receive income from each of the sources example, if a client's employment has bee was 2 weeks ago from a job in which the | tructs otherwise. hildren, as long as listed rather than en terminated and the e client was working |
| | | | Defa | ult Last Assessment | | | |
| Asse | ssment Active | | | | | | |
| | Income | Assessment Date:* from Any Source:* from Any Source:* Expenses: | Yes | ▼ 60 ▼ 60 ▼ 60 | | | |
| Non- | Cash Benefits | | | | | | |
| | Туре 🛆 | | | | Description 🔺 | | Monthly Amount 🔺 |
| | Special Supplemental Nutrition Program for Women, Ir Supplemental Nutrition Assistance Program (SNAP) | ntants, and Children | | | | | \$192.00 |
| | TANE Child Care Services | | | | | | \$192.00 BI |
| | TANF Transportation Services | | | | | | |
| | Other TANF-funded Services | | | | | | |
| _ | Postion 9. Public Llousing or Other Pontol Assistance ¹ Deprecated in 2017 (HMIS v6.1) | | Cou | int/Total Monthly Income: | | 1 | \$192.00 |
| | | | | | | | Rave 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.

| | F | P RRH | 2 | Ηοι |
|---|----|--------------------|-----------|-------|
| | 28 | Add Household M | lember | - |
| 2 | M | Associated Asses | sments | - |
| | | Exit the Enrollmer | nt | |
| - | 1 | Edit Enrollment | | Servi |
| | | Edit Project Entry | Workflow | |
| | -> | Link Assessments | 6 | |
| | | Review Entry Ass | essments | |
| | Ø | Update/Annual As | ssessment | |

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

Enrollment Exit

| | | | | | 📰 🚯 👔 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|--------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|
| o exit the client from the Enrollment, enter the Exit Date and Destination. | | | | | |
| Exit Date:* Destination:* | 01/08/2020 | using subsidy |] | | ¥ |
| Case Manager Assignment: | Kayleigh Partain 🤨 | | | | |
| End Case Assignment: | × • | | | | |
| | | | Alwa | iys End Ca | se |
| ces | | | | | |
| | Family Income: No Recent Income | | A | ssignment | |
| | Family Members Poverty Level | 1 \$1,040.83 | | | |
| | | | | | |
| Service Date:* | 01/08/2020 | | | | |
| | 01/08/2020 | | | | |
| Grant: | | 1 • | | | |
| Grant: | - SELECT V | | | | |
| Grant: | - SELECT • 08/05/2019 - WE CARE STAN RRH | | Units* 🔺 | Unit Value* 🔺 | Total 🔺 |
| Grant: Enrollment:* | - SELECT • 08/05/2019 - WE CARE STAN RRH | found. | Units* 🔺 1.00 | Unit Value* 🔺 | Total ▲ \$0.00 |
| Grant: Enrollment:* | - SELECT • 08/05/2019 - WE CARE STAN RRH | found. Unit Type ▲ | | | |
| Grant: Enrollment:* Service* & Child care | - SELECT • 08/05/2019 - WE CARE STAN RRH | found. Unit Type 🔺 Dollars 🔻 | 1.00 | \$0.00 | \$0.00 |
| Grant: Enrollment:* Service* Child care Consumer Life Skills/Advocacy | - SELECT • 08/05/2019 - WE CARE STAN RRH | found. Unit Type Dollars • Count • | 1.00 | \$0.00 \$0.00 | \$0.00 \$0.00 |
| Grant: Enrollment.* Service* ▲ Child care Consumer Life Skills/Advocacy Criminal Justice/Legal Service | - SELECT • 08/05/2019 - WE CARE STAN RRH | found. Unit Type * Dollars • Count • Count • | 1.00 1.00 1.00 | \$0.00 \$0.00 \$0.00 | \$0.00 \$0.00 \$0.00 |
| Grant: Enrollment;* Service* ≜ Child care Consume Life Skills/Advocacy Cirrinial Justice/Legal Service Day Care | - SELECT • 08/05/2019 - WE CARE STAN RRH | found. Unit Type ▲ Dollars ▼ Count ▼ Count ▼ Count ▼ | 1.00 1.00 1.00 1.00 | \$0.00 \$0.00 \$0.00 \$0.00 | \$0.00 \$0.00 \$0.00 \$0.00 |
| Grant: Enrollment:* Service* a Chilo care Consumer Life Solits/Advocacy Criminal Justice/Legal Service Day Care Do you have any pets? If yes, number and dogs or cats? | - SELECT • 08/05/2019 - WE CARE STAN RRH | found. Unit Type ▲ Dollars ▼ Count ▼ Count ▼ Count ▼ | 1.00 1.00 1.00 1.00 1.00 | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 |
| Grant: Enrollment:* Service* ▲ Child care Consume Life Skills/Advocacy Consume Life Skills/Advocacy Co | - SELECT • 08/05/2019 - WE CARE STAN RRH | Unit Type & Dollars • Count • Count • Count • Count • Count • | 1.00 1.00 1.00 1.00 1.00 1.00 | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 |
| Grant: Enrollment:* Service* & Child care Consume LVE Skills/Advocacy Oriminal Justice/Legal Service Day Care Day Care Day Care Education Emergency housing assistance | - SELECT • 08/05/2019 - WE CARE STAN RRH | found. Unit Type * Dollars Count Co | 1.00 1.00 1.00 1.00 1.00 1.00 1.00 | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 |
| Grant: Enrollment:* Service* Child care Consumer Life Skills/Advocacy Criminal Justice/Legal Service Day Care Do you have any pets? If yes, number and dogs or cats? Education Emregency housing assistance Emregency housing assistance | - SELECT • 08/05/2019 - WE CARE STAN RRH | Gount Unit Type & Dollars Count Co | 1.00 1.00 1.00 1.00 1.00 1.00 1.00 1.00 | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 | \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 \$0.00 |

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

| HUD Program Exit | Steve Fleming's Dashboard 🕨 Enrollment Exit 🕨 🕂 Universal D | ta Assessment | | | 2 🗊 👬 🚔 🏹 |
|---------------------|----------------------------------------------------------------------------|------------------------------------------------------|-------------------------------------------|------------------|-----------|
| н х | | Default Client's La | et Assessment (1) | | |
| Exit Enrollment | | Donant Ononio En | | | |
| Exit Assessments | Assessment | Date:* 10/02/2019 | | | |
| Exit Assessments | Age at Assess | nent: 30 | | | |
| | Assessment | ype:* Exit | Ŧ | | |
| | Ass | ssor:* Kayleigh Partain 🔍 | • | | |
| | Pro | ram: FP RRH | | | |
| | Health Insurance - Please indicate whether or not the client is covered by | nealth insurance. If so, yo <u>u will be able to</u> | record health insurance sources for the c | lient. | |
| | Covered by Health Insur | Default Last In Ince:* Yes | surance Status | | |
| | 🔲 Туре 📥 | Status* 🔺 | Reason No 🤨 🔺 | Other Coverage 🔺 | |
| | Private Pay Health Insurance | No | SELECT 🔹 | so. | |
| | Medicare | No | SELECT 🔻 | ø | |
| | Medicaid | No | SELECT 🔻 | ഗ | |
| | State Children's Health Insurance F | ogram S-CHIP NO 🔻 | SELECT 🔹 | ത | |
| | Veteran's Administration (VA) Med | al Services No 🔻 | SELECT 🔻 | (9) | |

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

| Identified Date:* | 10/02/2019 🔳 | |
|----------------------|---------------|---|
| Screen: | Special Needs | ۲ |
| Disabling Condition: | No | ٣ |

| | Barrier 🛆 | Help 🔺 | Barrier Present?* ▲ | Condition is Indefinite 📥 | Exp | planation 🔺 | Previous Barrier Details | |
|----------|--------------------------|--------|------------------------|------------------------------|-----|-------------|--------------------------|--------|
| | Alcohol Abuse | 0 | No | • | | | Previous Barrier | 6 |
| | Chronic Health Condition | 0 | No | • | | | Previous Barrier | Ø |
| | Developmental Disability | 0 | No | • | | | Previous Barrier | ത |
| | Drug Abuse | 0 | No | • | | | Previous Barrier | Ø |
| v | HIV/AIDS | 0 | No | • | | | Previous Barrier | Ø |
| • | Mental Illness | 0 | No | • | | | Previous Barrier | s B |
| | Physical Disability | 0 | No | • | | | Previous Barrier | 6 |

Income Sources & Non-Cash Benefits

Assessment Active

| | Assessment Date:* Income from Any Source:* Non-Cash Benefits from Any Source:* Expenses: | Yes 🔹 | | |
|-----|---------------------------------------------------------------------------------------------------|-----------------------------|---|---------------------|
| com | e | | | |
|) | Туре 🛆 | Description 🔺 | | Monthly Amount 📥 |
| | Earned Income | | | \$1,500.00 🔊 |
| | Unemployment Insurance | | | |
| | Supplemental Security Income | | | |
| | Social Security Disability Income | | | |
| | Private Disability Insurance | | | |
| 1 | Worker's Companyation | Count/Total Monthly Income: | 1 | \$1,500.00 |
| | | | | I Save and Clos |

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 |] |
| | | |

| (O) | 🗧 🖊 HUD Progra | | inter Olivertite | the state of the s | in the client's family. Please set | and of the other second | | C 0 11 (|
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|
| nt m mbers inrollment | The Project Start Date • for Street Outreach p • for Street Outreach p • for Safe Nevens and • for Safe Neve | To rojects – it is the date exiting and restarting' ment Housing include i by the client or from on may not yet have b ted they want to be ho coess services and h | of first contail client first sta for each stay it is the date ng Rapid Re H the referral in een gathered sused in this p cusing throug | t with the client, yed in the shatter for the cons for a specified period. The client movies into the resi dousing – it is the date follow ficiates they meet the criteria i respect. | ecutive shelfer period from enti dential project (i.e. first night in ng application that the oller two for admission (for example if of is the project has a housing op | y to exit. Night by nigh residence) as admitted into the pr ronic homelessness in eming (on-site, site-bar | it shelters, which use a bed-right tracking method ropect. To be admitted indicates the following fact- required the classite they have a serious required the classite in the second to have on | disability and have been homeless long enough to qualify |
| | | | | Project | WE CARE STAN RRH | | | |
| | lousehold - Excerpt from you'd live together in one | | | household is a single individu | al or a group of persons who ap | oply together to a cont | tinuum project for assistance and who live togethe | ar in one dwelling unit (or, for persons who are not housed |
| | | | | | | | | |
| |) Name = | Gender + | Age | Project Start Date + | Case Manager 🖶 🔺 | | Relationship to Head of Household" + | Housing Move-In Date + |
| | Name Parkman; Carl | Gender + Maie 1 | Age = 48 | Project Start Date + 08/05/2019 | Case Manager 🗑 🔺 Kayleigh Partain | Q | Relationship to Head of Household" + Self • | Housing Moye in Date + 12/23/2019 |

Runaway Homeless Youth (RHY) Exit

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



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

| Eric Cantu 10/1/2002 Trans | Male (FTM or Female to M. 11577 | |
|-------------------------------|------------------------------------------------------------------------------|---------|
| HUD Program | Eric Cantu's Dashboard 🕨 🖊 Enrollment Exit | z 🛈 🗿 🚔 |
| Exit | To exit the client from the Enrollment, enter the Exit Date and Destination. | |
| н х | | |
| Exit Enrollment | Exit Date:* 10/02/2019 🛅 | |
| Exit Assessments | Destination:* Staying or living with family, permanent tenure | • |
| | Exit Reason: - SELECT • | |
| | Date of Status Determination:* 05/27/2019 | |
| | Youth Eligible for RHY Services :* Yes • | |
| | Runaway Youth:* Yes • | |
| | Case Manager Assignment: Alejandra Cortes 🧶 | |
| | End Case Assignment: 🛛 🖻 | |

RHY EXIT Assessment

| HUD Program | 🗧 • Child Education Assessment 🕨 Health Assessment 🕨 🕂 RHY Exit Assessment | | | | | |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|--|--|
| Exit | Use this assessment to collect RHY required data related to a client's exit from a RHY funded program. This assessment should be used in an exit workflow. | | | | | |
| п х | | | | | | |
| Exit Enrollment | | | | | | |
| Exit Assessments 🔺 | Assessment Active | | | | | |
| Barriers / Special Needs | Assessment Date:** 10/02/2019 回 | | | | | |
| Income | Project Completion Status:* - SELECT - | | | | | |
| Employment | Commercial Sexual Exploitation/Sex Trafficking | | | | | |
| Child Education | Ever received anything in exchange for sex (e.g. money, food, drugs,* shelter): -SELECT - • | | | | | |
|) Health | Labor Exploitation/Trafficking | | | | | |
| RHY Exit Assessment | Ever afraid to guit/leave work due to threats of violence to yourself,* | | | | | |
| Counseling Assessment | Ever atraid to quitrieave work due to threats of violence to yourself, | | | | | |
| Safe and Appropriate | Ever promised work where work or payment different than you* expected: | | | | | |

RHY Counseling Assessment

| 4 | Eric Cantu | Male (FTM or Female to M_ 11577 |
|-----------|-------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| HU Exi | - | Knoth Assessment) RMF Ext Assessment Counseling Assessment Counseling Assessment-to be collected at exit for all adults and heads of household. |
| ę | II × | Clicking this button will fill in default information from the selected |
| 0 | Exit Assessments A Barriers / Special Needs | Assessment Active |
| • | Income Employment | Pre-Exit Assessment Date:* 10/02/2019 |
| ļ | Child Education | Counseling received by client.* -SELECT Total number of sessions planned in youth's treatment or service plan: 1-48+ |
| ļ | Health RHY Exit Assessment | Post-Erit |
| J | Counseling Assessment Safe and Appropriate Exit | A plan is in place to start or continue counseling after exit.* - SELECT - • |

RHY Safe and Appropriate Exit

| N | Nodesto Testing | s Male (FTM or Female to M CLIENTID 11577 | | | | | |
|---|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|--|--|--|--|
| н | UD Program | 🗧 « RHY Exit Assessment 🕨 Counseling Assessment 🕨 🕂 Safe and Approp | oriate Exit | | | | |
| E | • | Complete the information below related to the selected client's safe and appropriate exit assessment and other relevant information. | | | | | |
| | н х | | | | | | |
| 9 | Exit Enrollment | | Default Client's Last Assessment 🥹 | | | | |
| ¢ | Exit Assessments 🖍 | Assessment Active | | | | | |
| 0 | Barriers / Special Needs | Assessment Date:* | 10/02/2019 🛅 | | | | |
| 0 | Income | | SELECT • | | | | |
| | Employment | | SELECT 🔻 | | | | |
| 0 | Child Education | Client has permanent positive adult connections outside of project:* | SELECT 🔻 | | | | |
| 0 | Health | Client has permanent positive peer connections outside of project:* | SELECT 🔹 | | | | |
| • | RHY Exit Assessment | Client has permanent positive community connections outside of * project: | SELECT V | | | | |
| 0 | Counseling Assessment | | | | | | |
| | Safe and Appropriate Exit | | | | | | |

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 supportinve follow-up to youth served by the program. Aftercare is those entries that are entere after the date of exit up to 180 days.

| | CHS Hutton RHY BCP 0 | н |
|---|---------------------------------|----|
| | Add Household Member | |
| E | Associated Assessments | |
| | Missed Annual/Update Assessment | |
| _ | 🖉 Edit Enrollment | |
| | Edit Project Entry Workflow | |
| | Edit Exit Workflow | |
| | ➡ Link Assessments | |
| | Re Enter the Enrollment | |
| | Review Entry Assessments | |
| | Review Exit Assessments | |
| ſ | A RHY Aftercare | |
| U | | IJ |

Create Aftercare Assessment



RHY Aftercare Assessment

| 💦 Mo | 🕅 Modesto Testing - ClientTrack 15 - Google Chrome | | | | | | | |
|------|-----------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|--|--|--|--|--|--|
| 🗎 h | https://usw.clienttrack.net/15/MainPage.aspx?Inline=false | | | | | | | |
| Ξ | ClientTrack™ ^{Cli} | ents 🛪 All Search Q | | | | | | |
| | Eric Cantu 10/1/2002 Trans | s Male (FTM or Female to M CLIENTID 11577 | | | | | | |
| | HMIS 2017 Post | Eric Cantu's Dashboard 🕨 🕂 RHY Aftercare Assessment | | | | | | |
| | Exit | Collected at Post-Exit stage for all RHY funded projects with the exception of the street outreach component (SOP). | | | | | | |
| | н х | This must be dated within 180 days after the project exit date. | | | | | | |
| | RHY Aftercare | | | | | | | |
| | Assessment | Assessment Active | | | | | | |
| | | Information Date* 10/02/2019 | | | | | | |
| | | Aftercare was provided:* 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 Exit

| HUD Program | Kelvin Southern's Dashboard 🕨 🦯 Enrollment Exit | 🥃 🕞 👪 🚔 |
|------------------|-------------------------------------------------------------------------------|---------|
| Exit | To exit the client from the Enrollment, enter the Exit Date en constituation. | |
| ш х | | |
| Exit Enrollment | Exit Date:* 10/02/2019 | |
| Exit Assessments | Destination:* SELECT | • |
| | Exit Reason: - SELECT | |
| | Case Manager Assignment: Kayleigh Partain 🤎 | |
| | End Case Assignment: 🗷 🖲 | |
| | | |

SOAR Connection

| 🗧 « Enrollment Exit 🕨 Universal Data Assessment 🕨 🕂 SOAR Connection | u 🕃 🕃 📰 |
|---------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| 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 Connection with SOAR:* 7 | |

Current Living Situation

| Current Living Situation | 5 |) 👪 🚔 | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|-------|--|
| 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)



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 | | | | |
| Nam | E Fleming, Patricia Kaye | Birth Date: | 7/11/2012 | |
| Gende | r: Female | | | |
| Ethnicity | / Hispanic/Latino | | | |
| Client II | ^{0:} 11680 | Race: | American Indian or Alask | a Native, White |
| Patricia's Enrollments | | | | |
| | | 1 result found. | | |
| Enrollment Active Household Description Members Household Type | Project Start Date | Housing Move-In Date Project Exit Date | Case ID EnrolIID D | ays Enrolled Exit Destination |
| Active PH - Rapid Re-Housing | | | | |
| FP RRH 2 Household with Childre | n and Adults 08/19/2019 | | 9414 11942 1 | 42 |
| Add Household Member | | | | |
| Associated Assessments | | No records found. | | |
| _ Delete Enrollment Service | | Units | | \$ Total Organization |
| / Edit Enrollment | | | | |
| Edit Project Entry Workflow | | | | |
| Link Assessments | | | | |
| C 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:* 1 | 0/02/2019 💼 | |
| Destination:* S | Staying or living with family, permanent tenure | • |
| Exit Reason: - | - SELECT 🔻 | |
| Case Manager Assignment: | Student 17 🤨 | |
| End Case Assignment: | 8 | |

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 🥴 | | | | | |
| 10/02/2019 | | | | | |
| 7 | | | | | |
| Exit | | | | | |
| Kayleigh Partain 🔍 | | | | | |
| FP RRH • | | | | | |
| nsurance. If so, you will be able to record health insurance sources for the client. | | | | | |
| | | | | | |

Barriers Assessment

| • چ | Enrollment Exit 🕨 Universal Data As | sessment 🕨 | 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. | | | | | | | |
| 10001 | tab of click free barrier notary to h | ener ai prenoa | barrero. | | | | | |
| | | | | | | D≣ View Barrier Histor | | |
| | | | | | | | | |
| issess | ment Active | | | | | | | |
| | | | Identified Date:* 10/02 | 2/2019 🔳 | | | | |
| | | | Screen: Spec | al Needs 🔹 | | | | |
| | | Dis | sabling Condition: No | Ψ | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | Barrier 🗠 | Help 📥 | Barrier Present?* 🔺 | Condition is Indefinite 🔺 | Explanation 🔺 | Previous Barrier Details | | |
| • | Alcohol Abuse | 0 | No 🔻 | | | Previous Barrier | | |
| | Chronic Health Condition | 0 | No 🔻 | | | Previous Barrier | | |
| | Developmental Disability | 0 | No 🔻 | | | Previous Barrier | | |
| | Drug Abuse | 0 | No 🔻 | | | Previous Barrier | | |
| • | HIV/AIDS | 0 | No 🔻 | | | Previous Barrier | | |
| • | Mental Illness | 0 | No 🔻 | | | Previous Barrier | | |
| • | Physical Disability | 0 | No 🔻 | | | Previous Barrier | | |

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



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

| You're done! | Click on the |
|---------------------------------------------------|--------------|
| All required steps have been completed. | finish bar |
| Finish Close the workflow | |

Patricia's Enrollment has an Exit Date

| Pat | Patricia's Enrollments | | | | | | | | |
|------|---------------------------|-----------------------------|------------------------------------|--------------------|----------------------|-------------------|--|--|--|
| | | | | | | 1 result found. | | | |
| | Enrollment Description | Active Household Members | Household Type | Project Start Date | Housing Move-In Date | Project Exit Date | | | |
| ⊿ E> | kited | | | | | | | | |
| | ⊿ PH - Rapid F | Re-Housing | | | | | | | |
| O | FP RRH | 2 | Household with Children and Adults | 08/19/2019 | | 10/02/2019 | | | |

Steve's Enrollment has No Exit Date

| Ste | ve's Enrollmer | nts | | | | |
|-----|---------------------------|-----------------------------|------------------------------------|--------------------|----------------------|-------------------|
| | | | | | | 1 result found. |
| | Enrollment Description | Active Household Members | Household Type | Project Start Date | Housing Move-In Date | Project Exit Date |
| ⊿ A | ctive | | | | | |
| | ⊿ PH - Rapid R | e-Housing | | | | |
| O | FP RRH | 2 | Household with Children and Adults | 08/19/2019 | 10/07/2019 | \bigcirc |

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

| Ξ | ClientTrack™ ^{Clie} | ents s All Search Q | Rayleigh Partain (Training) Help Sign Out |
|---|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| | TSAAnonymous Ar 6/1/1992 | lonymous | |
| | Intake (2298) | Client Information | 🐺 🖲 👔 🚔 |
| | п х | | 0 |
| | Basic Client | Search Existing Clients | Basic Client Information |
| | Information | SEARCH EXISTING CLIENTS 💡 | |
| | Family Members | | e entry. Enter partial identifying information on the client, and then click Next to search from existing client records. |
| | Program Enrollment | 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 appea If there are no accurate matches, click Next again to continue to Step 2 in adding a new client record. | s, select and open that existing client record by clicking on that row. |
| | | First Name: TSAAnonymous | |
| | | Last Name: Anonymous | |
| | | Social Security Number | |

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

| | Modesto Testing PUS ANONYMOUS | | | | | | |
|----|-------------------------------|---|--------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|
| Ir | take (2298) | | Client Information | 👼 🕕 🗿 | | | |
| | | × | • | • | | | |
| | Basic Client | | Search Existing Clients | Basic Client Information | | | |
| | Information | | BASIC CLIENT INFORMATION 🕢 | | | | |
| | Family Members | | | ave associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social now or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met. | | | |
| | Program Enrollment | | security number data quality fields allow users to indicate when a client doesn't ki | now or reluses to provide information. If the required data is collected then client frack automatically records that full data quality was met. | | | |
| | | | First Name:* 1 | TSAAnonymous | | | |
| | | | Last Name:* 🖊 | Anonymous | | | |
| | | | Middle Name: | | | | |
| | | | Suffix: | | | | |
| | | | Name Quality:* | Full name reported 🔹 🔍 | | | |
| | | | Social Security Number: | | | | |
| | | | | © Client doesn't know © Client Refused © Data not collected | | | |
| | | | | | | | |

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

| 🕤 TSAAnonymous Anonymous's Dashboard 🕨 🦯 Client Informati | ion l |
|-----------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name Qu | uality:* Full name reported |
| Social Security Nu | mber: |
| SSN Q | uality:* O Client doesn't know |
| | Client Refused Data not collected |
| Basic Client Demographics | |
| | Date:* 06/01/1992 |
| | |
| | t Age: 27 mality: * |
| Date of Birthan | dality.* Approximate or Partial DOB Reported Full DOB Reported Client desprit know |
| | Client refused Data not collected |
| Ethr | nicity:* Non-Hispanic/Latino 🔻 🤍 |
| | Race: American Indian or Alaska Native Asian Black or African American Native Hawailan or Other Pacific Islander White Client doesn't know |
| Ge | ender:* Male |
| Veteran S | tatus:* No • |
| Show Address and Contact Inform | ation: |
| Family Information - Use this section to collect data about a client's famil family. | y. The Family search field allows you to search for and select an existing family account. This is appropriate when adding a family memb |
| Fa | amily: Anonymous, TSAAnonym 🧶 |
| Relationship to Head of House | ehold:* 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.

| TSAAnonymous's Enrollm | ents | | | | | | | | | | ۵ |
|---------------------------|-----------------------------|----------------------------|--------------------|----------------------|-------------------|---------|-----------------------|------------------|--------------------|---------------|--------------|
| | | | | | 1 result found. | | | | | | |
| Enrollment Description | Active Household Members | Household Type | Project Start Date | Housing Move-In Date | Project Exit Date | Case ID | nrollID Days Enrolled | Exit Destination | Organization | Last Assessed | Program Type |
| ⊿ Active | | | | | | | | | | | |
| Emergency shelter | | | | | | | | | | | |
| 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.

| ClientTrack™ | Cli | ents 5 | All Search | Q | Kayleigh Partain (Training) Help |
|--------------------------------------------------|-----|-----------|---------------------------|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Brandie Harwell 10/23/1967 | | | | | |
| Intake (2298) | | e Bra | andie Harwell's Dashboard | Client Information | ition 💂 🕢 👔 🚔 |
| н | × | BASIC | CLIENT INFORMATION | 0 | |
| Basic Client Information | | the re | ason full information was | n't collected. Name and s | social security number have associated data quality fields. Data quality fields are used to indicate social security number data quality fields allow users to indicate when a client doesn't know or lected then ClientTrack automatically records that full data quality was met. |
| Family Members | | | | First Name:* | Brandie |
| O Program Enrollmen | it | | | Last Name:* | Harwell |
| | | | | Middle Name: | |
| | | | | Suffix: | |
| | | | | Name Quality:* | Full name reported |
| | | | Soci | al Security Number: | 561 - 98 - 7529 🔍 |
| | | Basic Cli | ient Demographics | | |
| | | | | Birth Date:* | 10/23/1967 🔤 🧐 |
| | | | | Client Age: | 51 |
| | | | E | ate of Birth Quality:* | Approximate or Partial DOB Reported Full DOB Reported Client doesn't know Client refused Data not collected |

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. <u>Be very specific</u> when you submit an issue to limit the number of times HMIS support needs to reach out for clarification. <u>Please note</u>, if Duplicate clients, make sure you are specific which client has the correct information to be merged.

| Modesto Testing - ClientTrack 15 - Google Chrome | - 6 - *- |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| http://usw.dienttrack.net/15/MainPage.aspx?Inline=faise | Q, |
| E XClientTrack Clents & All Search Q | A Patty Estrada (Training) Help Sign Out |
| Ken Paul 3/13/1980 | Community Housing and Shelter Services "Modesto Users 2020 Modesto Testing |
| 📑 🗟 🖈 🦯 Cilent information | |
| BASIC CLIENT INFORMATION @ | |
| Complete the client's identifying information. Name and social security number have associated data is called that is under a data is a client data is under the fields. But a quark (refix) was not number of refix and quark (refix) was not n | data quality fields allow users to indicate when a |
| | |
| help with description | |
| Rac How can we read you? Faily information - Use this section to collect data about a client's family member to an existing family Family information - Use this section to collect data about a client's family member to an existing family Family Family information - Use this section to collect data about a client's family member to an existing family Family Family Family Family Rem - 1980 | * |
| Relationship to Head of Household.* Self • • • Begin Date: 10/24/2014 | Einish 🗙 Cancel |

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 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

| | | Verified in Train Verify Verify |
|------------------------------------------------|-------------------------|--------------------------------------------------------------------------------------|
| To Edit your note or a | dd notes you car | 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 s please include your di | | ewing your submitted isses in the event there are questions attached to it, also er. |

HMIS Reports

Access the Reports Workspace from the Workspace Carrousel.



Clients in Program

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





| Client Track Reports to All Search Q | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|
| ClientTrack Reports to All Search Q | A 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. | #1 |
| aved 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 t st the next time you access this screen. | d run the report. The saved settings will appear in the |
| Saved Report Settings: -SELECT - • | |
| ate Range - Indicate the time period for this report. Only records that fall within the date range you select will be included. | |
| Predefined DaGe Range: | |
| un Report By - Select Erroll to run the report filtered by program enroll date fall in the report date range. Select Exted to filtered by the program exit date. Select Erroll at any time to show all the clients still in the program exit date. Select Erroll at any time to show all the clients still in the program exit. | a r #2 ^{date range.} |
| rganization(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 vie | |
| Organization(s)* City of Modesto City of Modesto Continuum of Care Family Promise HMIS Frances HMIS Training | |
| rogram(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 elect all. | he report by selecting each program separately, or click the ✔ icon to |
| Program(s) Filter by Program(s) CHSS EFSP SHELTER CHSS MOD PA RRH CHSS SMOD PA RRH CHSS Support Services CHSS TARK/Motel Vouchers | |
| rant(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 se | selecting each grant separately, or click the 🥥 icop to select all. |
| Grant(s): Filter by Grant(s) | |
| sers - 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 select | ting each user separately, or click the 💉 icon to select all. |
| User: 🗇 Filter by User | K |
| | Report Schedule Report X Cancel |
| | |

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

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

| Clients in F | Programs Report | | | | | - | | |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|----------|----------------|-----------|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| 14 4 1 | of 1 ▷ ▷ ↓ ↓ Find Next | 🖳 • 🚯 | | • 🗌 🕐 | | | | |
| | | | | | | | | |
| | Clients in Programs | | | | | | | |
| | 7/1/2019 to 1/31/2020 | | | | X | ClientTrack™ | | |
| | Report Criteria: | | | | | | | |
| | Organizations: Community Housing and Shelf | ter Services | | | | | | |
| | Programs: CHSS TANF/Motel Vouchers | | | | | | | |
| | Community Housing and Shelter Services | Enrolled 🛊 | Exited 🛊 | Total 🛊 | Clients 🛊 | | A COLUMN TWO IS NOT | |
| and the state of | Content of the second sec | 11 | 1 | 12 | 12 | | | |
| | Organization Total | 11 | 1 | 12 | 12 | | | |
| | Total | 11 | 1 | 12 | 12 | | Contraction of the local division of the loc | |
| | | | | | | Patty Estrada | and the second | |
| A DECEMBER OF THE OWNER. | ClientTrack™ Reports | Page 1 of | 1 | | | 1/9/2020 1:08 PM | Contraction of the local division of the loc | |
| | #1 | | | | | | | |
| | | | | | | | | |
| Contra de Contra de | | CONTRACTOR OF THE OWNER | | | | | | |
| | A DESCRIPTION OF A DESC | A COLUMN TO A C | | THE PARTY NAME | | | | |

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

| 14 4 1 | of 1 🕨 🕅 🍕 | | Find Next | | 1 | | 0 | | |
|--------|-----------------------|-----------------|-------------------------------------|---------------------------------------------|-------|-------------|-----------|------------------------|--------------|
| | | | | Excel Excel Di PDF | sta | | | | |
| | Clients in Programs | | | Word | | | 0- | | |
| | 7/1/2019 to 1/31/2020 | | | | | | Xc | lientTra | ack™ |
| | Report Criteria: | - | | | | | | | |
| | Organizations: 0 | Community Ho | ousing and Shelter | Services | | | | | \sim |
| | Programs: 0 | HSS TANF/N | totel Vouchers | | | | | | |
| | Community Housing | and Shelter | Services | Enrolled 🗧 Exi | ted 🛊 | Total 🛫 | Clients 🛊 | | |
| | CHSS TANF/Motel | | | 11 | 1 | 12 | 12 | | |
| | Name \$ | SSN Last 4 | Race \$ | Gender \$ | Ane | Enroll Date | Exit Date | Enro Days | olimentLengt |
| | Conrad, Smith | XXX-XX- 7948 | White | Trans Male (FTM or Female to Male) | | 10/10/2014 | | 215 | 194 |
| | Eisenhart, Dana P | XXX-XX- 6572 | American molec or Alaska Nativi | Female | 74 | 9/26/2019 | | 128 | 12 |
| | Lapoint, Roy | XXX-XX- 7918 | White | Male | 65 | 9/25/2019 | | 129 | 12 |
| | McKenzle, Janis | XXX-XX- 9849 | White | Female | 29 | 9/30/2019 | | 124 | 12 |
| | Miller, James | | Black or African American | Male | | 9/28/2019 | | 126 | 12 |
| | Nicolas, Happy | XXX-XX- 1154 | White | Female | 5 | 9/9/2019 | | 145 | 14 |
| | Nicolas, Joy | XXX-XX- 0979 | White | Female | 19 | 9/9/2019 | | 145 | 14 |
| | Osborn, Robert R | XXX-XX- 5563 | Black or African American | Male | 66 | 9/28/2019 | | 126 | 12 |
| | Pasual, Abraham | XXX-XX- 7918 | White | Male | 65 | 9/27/2019 | | 127 | 12 |
| | Paul, Ken | XXX-XX- 9846 | Black or African American | Male | 34 | 10/24/2014 | 1/7/2020 | 191 | 190 |
| | Steffen, Kathy S | XXX-XX- 2159 | White | Female | 16 | 9/27/2019 | | 127 | 12 |
| | Steven, James L | XXX-XX- 2884 | American Indian or Alaska Native | | 18 | 9/26/2019 | | 128 | 12 |
| | Program Total | 11 stil | I 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 E 1/9/2020 1: | |

Service Summary Report

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



Complete Date Range, Program, Services, and Report

| Service Summary Report | 💻 🛈 🚍 🗊 |
|----------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Date Range - indicate the time permanent this report. Only records that rail within the date range you serve | ect win be included. |
| Predefined Date | Range: Previous Quarter • |
| Service Date B | etween:* 07/01/2019 and 09/30/2019 |
| Organization(s) - Indicate which organizations should be included in the report by selecting each organi | ization separately, or click the 🖌 icon to select all. Note: The list only shows organizations you are authorized to view. |
| Organization(s):* | Inter-ratio vanisates MGM My Sample Organization Outrach & Engegenent Center Salvation Army ESG STANCO |
| Program(s) - Check the box to limit report results by selected programs. When checked, the list displays select all. | s 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 |
| Program(s): | |
| Grant(s) - Check the box to limit report results by selected grants. When checked, the list displays grant | s 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 | ices. NOTE: The services in this list are filtered according to the organizations and funding sources selected above. |
| Services: | i⊭ Filter by Services ✓ Child care (511) ✓ Consumer Life Skills/Advocacy (22) ✓ Criminal Justice/Legal Service (25) ✓ Day Care (27) ✓ Day cou have any pets? If yes, number and dogs or cats? (644) ✓ Education (26) |
| User(s) - Check the box to limit report results by selected users. When checked, the list displays users t | hat belong to the organizations you selected above. Indicate which users should be included in the report by selecting each user separately, or click the discrimination to select all. |
| User(s) | Filter by User(s) |
| Housing Status - You may here the results by clients with specific housing statuses. | |
| Housing Status: | © Friter 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.

| ary Report F1 ▷ ▷』 � | Ineal | Find Next | B () | | • [] (| 2 | | | | | |
|-------------------------|----------|-----------------------|-------------|------------------|---------------------|----------|-------------------------|-----------------------|------------------------|-------------------------------------|---|
| | | | | | | | | | | | |
| Service Summary | | | | | | | | | | | |
| 7/1/2019 to 9/30/201 | 9 | | | | | | | | Clie | entTrack | |
| Report Criteria: | | | | | | | | | | | |
| Organizations: | Salvatio | on Army ESG | i i | | | | | | | | |
| Services: | Multiple | • | | | | | | | | | |
| Programs: | TSA En | nergency She | elter | | | | | | | | |
| First Time Served: | N/A | | | | | | Children | | | Total Individuals | |
| Service \$ | | Service Entries \$ | Units \$ | Total Value 🛟 | Undup. Clients ‡ | Families | in Families | Adults in Families | Seniors in Families | in | |
| Employment | | 1 | 1.00 | | | | | | 1 | 0 | 1 |
| Duplicated Total | | 1 | 1.00 | \$0.00 | 1 | | 1 | 0 | 1 | 0 | 1 |
| | | Service Entries | Units | Total Value | Undup. Clients | Families | Children in Families | Adults in Families | Seniors in Families | Total Individuals in Families | |
| Unduplicated Totals | 1 | 1 | 1.00 | \$0.00 | 1 | 1 | 0 | 1 | | 0 1 | |
| | | | | | | | | | Ka | yleigh Partain | |
| ClientTrack™ Repor | ts | | | Pa | ge 1 of 1 | | | | 10/22/2 | 019 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.

ь

| | | | Excel Excel D | Data | Contraction of the local division of the loc |) | and the second second | Contraction of the local division of the loc | | |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|-------------|
| | | | PDF Word | | / | | | | | |
| | Service Summary | | | | | | | N | | |
| | 7/1/2019 to 9/30/2019 | | | | | | | Clie | ntTrack | 114 |
| | Report Criteria: | | | | | | | | | |
| | Organizations: | Salvation Army ES | G | | | | | | | |
| | Services: Programs: | Multiple TSA Emergency Sh | neiter | | | | | | | |
| | First Time Served: | N/A | | | | | | | | |
| | Employment | | | | | | | | | |
| 1 | Client Name \$ | Date \$ | Units | Undup. Total Clients | Families | Children in Families | Adults in Families | Families | Individuals in Families | |
| | McNeal, Nancy Unduplicated Totals | 9/20/2019 | 1.00 | \$0.00 1 \$0.00 1 | 1 | 0 | | 1 0 | | 1 |
| | | | | | | | | | | |
| | | | | | | | | ĸ | iyleigh Partaii | n |
| | ClientTrack™ Reports | | | Page 1 of 1 | | | | | 019 12:01 PN | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| and the other division of | States and Constant of the State of the Stat | No. of Concession, Name of Street, or other | State of Concession, | CONTRACTOR OF AND ADDRESS OF ADDRES | Contraction of Contraction of Con- | | | The Distant of the Life of | Contrast with La | |
| 🛜 Help | for Service Summary Re | port | | | | | | | _ | . 🗆 🗙 |
| | | | | | | | | | | _ |
| | ice summary reports the the services will be filter | | y organization | ns selected in the | organization | selection bo | . Also ba | se on the oth | er selections | made on |
| How filter | rs are applied | | | | | | | | | |
| | ram filter is applied such nto selected. | that the client that i | is enrolled in t | the program at th | period of tir | ne of the serv | ice will be | included if p | rogram the c | lient is |
| | ode filters is applied to th record is created. The ho s created. | | | | | | | | | |
| How this | are defined | | | | | | | | | |
| | t of family members and ervice the service is cour | | | s dependent upor | the client's c | current family | at time of | service. For | clients not in | family at |
| This repo | rt allows for users to clic | ck the particular ser | vice and get n | | e services pre | ovided. User: | may click | the particula | r client and g | get further |
| | to the service and memb mmary information colui | | ne client bein | g served. | | | | | | |
| <u>in the out</u> | <u></u> | | | | | | | | | |
| Entries- (| Count of all services prov | vided. | | | | | | | | |
| | | | | | | | | | | |
| Units - 🤉 | sum of all the units provi | ided for the service. | | | | | | | | |
| | | | | | | | | | | |
| Total Val | lue - Sum of values for s | services provided of | that service t | vpe | | | | | | |
| | | | - | | | | | | | |
| Clients - | Count of clients who rea | ceived the service | | | | | | | | |
| cilcito | | | | | | | | | | |
| Housebo | Id - Count of Families s | enved | | | | | | | | |
| . iouseil0 | | | | | | | | | | |
| | с с. н | | | | | | | | | |
| Adulta | | nantiny or single per | sons 18 years | s and older at tim | : UI SERVICE. | | | | | |
| Adults - | Count of all members of | | | | | | | | | |
| | | | | | | | | | | |
| | Count of all members of | family or single pers | ons under the | e age of 18 at tim | e of service. | | | | | |
| Child - C Senior - | | f family or single per | | | | ne of service. | The Senio | r age is as en | tered on the | launch |
| Child - C Senior - | Count of all members of t | f family or single per | | | | ne of service. | The Senio | r age is as en | tered on the | launch |

Emergency Soultions Grant (ESG) CAPER Export





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"

| | https://usw.clienttrack.net/15/MainPage.aspx?Inline=false | | | Q |
|---|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|----------------------------------------------------------------------|-------------------------------------------------------------------|
| Ξ | ClientTrack™ Reports 5 All Search Q | | | 🌲 Patty Estrada (Training) Help Sign Out |
| ? | | | | |
| | Files on Server | | | |
| | Displayed below is a list of the files available for you to download. Files may be available for a lim will no longer be available for download by any user or be available for processing if used in an im | ted time they expire, and will be automatically removed, on the port once deleted. | date specified. To download the file click the download link, to rem | iove the file from file on server click the delete link. The file |
| 1 | Click to view the status of export or import tasks. | | | |
| | File-Name | Creator | Created | Expires |
| ~ | File Name | Creator | Created | Expires |

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

| betwee status of the fifes available for you to download it provides and multiple subornatically removed, on the date specified. To download it provides download it provides and the download | on Server | | | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|-------------------------------------------------------------------------|---------------------------------------------------------|-----------------------------------------------------|
| Penane Cector | | | tically removed, on the date specified. To download the | he file click the download link, to remove the file |
| Task Test | ck to view the status of export or import tasks. | | | |
| Asynchronous Tasks | File Name | Creator | Created | Expires |
| | | Tool 1 lot | | X |
| Below is a listing of lasts that are either queued to be completed or that have been completed in the last 40 payr. To view log of the view log it is important to note that it a task begins its execution at the not available time based on overall system load. Show only my tasks: | | | | |
| details folder of he left of the task. To view alog 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 variable time based on overall system load. Refreshing in 19 seconds Plant Area Plant | | Asynchronous Tasks | | 🔤 🕢 👔 🖬 🚔 ? |
| Refreshing in 19 seconds in Displaying 1-200 of 601 results. Next Last 1 Isis Name A Device Start Time A. End Time A. Tisis Name A I Mills APR/CAPER 2020 Validation 0/109/2020 328PM Not Started 6984 Hilds APR/CAPER 2020 Validation 0/109/2020 328PM Not Started 6984 Hilds APR/CAPER 2020 PieLoad 0/109/2020 328PM Not Started 6984 Run CSV Export - HMIS APR/CAPER 2020 PieLoad 0/109/2020 328PM Completed Successfully 6983 Cache Cleanty 01/09/2020 406AM 0/109/2020 406AM Completed Successfully 6983 Missing ServiceFamilyInfo 01/09/2020 200AM 01/09/2020 406AM Completed Successfully 6983 Missing ServiceFamilyInfo 01/09/2020 200AM 01/09/2020 100AM 01/09/2020 100AM 00/09/2020 100AM 60984 Check For Case Manager Assignments 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69833 LEX Stajing Data Clean-up 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69839 ED Remove Past Staging Records 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69830 <t< td=""><td></td><td>details folder to the left of the task. To view a log of the task execu</td><td>tion, upon task processing, completion or error, click</td><td></td></t<> | | details folder to the left of the task. To view a log of the task execu | tion, upon task processing, completion or error, click | |
| Task Name A Displaying 1-200 of 601 results. Net: Last Task Name A Desired Start Time A End Time A End Time A Task Name A Image APR/CAPER 2020 Validation 01/09/2020 328PM Not Started 6984 HMIS APR/CAPER 2020 Explot 01/09/2020 328PM Not Started 6984 Bun CSV Export - HMIS APR/CAPER 2020 Pre-Load 01/09/2020 328PM Not Started 6984 Cache CleakUp 01/09/2020 300AM 01/09/2020 306AM Completed Successfully 69834 End Expired Enrolment Accounts 01/09/2020 200AM 01/09/2020 120AM Completed Successfully 69834 Check For Case Manager Assignments 01/09/2020 200AM 01/09/2020 120AM Completed Successfully 69833 Lisk Latigning Data Clean-up 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69834 ED Remove Past Staging Records 01/09/2020 100AM 01/09/2020 100AM 01/09/2020 100AM 6099/2020 100AH 69834 ED Remove Past Staging Records 01/09/2020 100AM 01/09/2020 100AM 01/09/2020 100AM 609/2020 100AM 609/ | | Show only my tasks: | | |
| Task Name A Desired Start Time A End Time A Status A TopID 0 HMIS APR/CAPER 2020 Validation 01/09/2023 328PM Not Started 0980 0 HMIS APR/CAPER 2020 Dipot 01/09/2023 328PM Not Started 0980 0 LMIS APR/CAPER 2020 Dipot 01/09/2023 328PM Not Started 0980 0 Extra Color Dipot 01/09/2023 328PM Not Started 0980 0 Cache Gestup 01/09/2023 500AM 01/09/2023 500AM Completed Successfully 6983 0 Massing ServiceFamilyInfo 01/09/2023 200AM 01/09/2020 102AM Completed Successfully 6983 0 Check For Case Manage Assignments 01/09/2020 200AM 01/09/2020 10AM Completed Successfully 6983 0 LSA Staging Data Clean-up 01/09/2020 10AM 01/09/2020 10AM 0009/2020 10AM 0009/2020 10AM 60984 0 EDI Remove Past Staging Records 01/09/2020 10AM 01/09/2020 10AM Completed Successfully 69831 0 Remove Die WorkFownistances 01/09/2020 10AM 01/09/2020 10AM 01/09/2020 10AM 01/09/2020 10AM 60091445 Successfully 69830 | | Refreshing in 19 seconds 🕕 🛛 🌀 Refresh Now | | |
| Task Name A Desired Start Time A End Time A Status A TopID 0 HMIS APR/CAPER 2020 Validation 01/09/2023 328PM Not Started 0980 0 HMIS APR/CAPER 2020 Dipot 01/09/2023 328PM Not Started 0980 0 LMIS APR/CAPER 2020 Dipot 01/09/2023 328PM Not Started 0980 0 Extra Color Dipot 01/09/2023 328PM Not Started 0980 0 Cache Gestup 01/09/2023 500AM 01/09/2023 500AM Completed Successfully 6983 0 Massing ServiceFamilyInfo 01/09/2023 200AM 01/09/2020 102AM Completed Successfully 6983 0 Check For Case Manage Assignments 01/09/2020 200AM 01/09/2020 10AM Completed Successfully 6983 0 LSA Staging Data Clean-up 01/09/2020 10AM 01/09/2020 10AM 0009/2020 10AM 0009/2020 10AM 60984 0 EDI Remove Past Staging Records 01/09/2020 10AM 01/09/2020 10AM Completed Successfully 69831 0 Remove Die WorkFownistances 01/09/2020 10AM 01/09/2020 10AM 01/09/2020 10AM 01/09/2020 10AM 60091445 Successfully 69830 | | | Dienlaving 1-200 of 601 results Next Last | |
| • HMIS APR/CAPER 2020 Validation 01/09/2020 328FM Not Started 6991 • HMIS APR 2020 Export 01/09/2020 328FM Not Started 6983 • HMIS APR 2020 Export 01/09/2020 328FM Not Started 6983 • Lin CSV Export 01/09/2020 328FM Not Started 6983 • Cache Cleaning 01/09/2020 328FM Occupited Successfully 6983 • End Expired Enrollment Accounts 01/09/2020 400AM 01/09/2020 40AM Completed Successfully 6983 • Missing Service Enrollment Accounts 01/09/2020 200AM 01/09/2020 10AM Completed Successfully 6983 • Check For Case Manager Assignments 01/09/2020 100AM 01/09/2020 10AM Completed Successfully 6983 • Lind Staign Data Clean-up 01/09/2020 100AM 01/09/2020 100AM 01/09/2020 100AM 60983 • Ein Remove Past Staging Records 01/09/2020 100AM 01/09/2020 100AM 01/09/2020 100AM 69832 • Auto Disable User 01/09/2020 100AM 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69832 • Remove Oid WorkFlowinstrances 01/09/2020 100AM 01 | | Task Name | | Status 🔺 TaskiD 💌 |
| Bun CSV Export - HMIS APR/CAPER 2020 Pre Load 01/09/2020 319PM 01/09/2020 328PM Completed Successfully 99837 Cache CleanDr 01/09/2020 500AM 01/09/2020 500AM 01/09/2020 406AM Completed Successfully 99837 End Expired Enrollment Accounts 01/09/2020 200AM 01/09/2020 106AM Completed Successfully 69835 Missing Service Familyinfo 01/09/2020 200AM 01/09/2020 116AM Completed Successfully 69834 Check For Case Manager Assignments 01/09/2020 200AM 01/09/2020 116AM Completed Successfully 69833 Lish Staging Data Olen-up 01/09/2020 100AM 01/09/2020 116AM Completed Successfully 69833 AutoRun, Service Checkin Month 01/09/2020 100AM 01/09/2020 116AM Completed Successfully 69831 EIR Remove Past Staging Records 01/09/2020 110AM 01/09/2020 110AM Completed Successfully 69832 Auto Runs Ferraria 01/09/2020 100AM 01/09/2020 110AM Completed Successfully 69832 B Remove Dia Work/Rowinstraces 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69825 Auto Diabel User | | HMIS APR/CAPER 2020 Validation | | |
| O Cache Clearup 01/09/2020 5.00AM Completed Successfully 69886 End Expired Enrollment Accounts 01/09/2020 4.00AM 01/09/2020 4.00AM Completed Successfully 69886 Missing ServiceFamilyInfo 01/09/2020 2.00AM 01/09/2020 1.20AM Completed Successfully 69884 Check For Case Manager Assignments 01/09/2020 1.00AM 01/09/2020 1.00AM Completed Successfully 69833 LSA Staging Data Clean-up 01/09/2020 1.00AM 01/09/2020 1.00AM Completed Successfully 69833 EDI Entrove Past Staging Records 01/09/2020 1.00AM 01/09/2020 1.00AM Completed Successfully 69833 EDI Remove Past Staging Records 01/09/2020 1.00AM 01/09/2020 1.00AM Completed Successfully 69839 Remove Old WorkFlowInstances 01/09/2020 1.00AM 01/09/2020 1.00AM Completed Successfully 69829 Auto-Diabe User 01/09/2020 1.00AM 01/09/2020 1.07AM Completed Successfully 69828 Permove Post Enrollment Services 01/09/2020 1.00AM 01/09/2020 1.07AM Completed Successfully 69828 Auto-Dose Referral 01/09/2020 1.00AM 01 | | HMIS APR 2020 Export | 01/09/2020 3:28PM | Not Started 6983 |
| End Expired Enrollment Accounts 01/09/2020 400AM Completed Successfully 69835 Missing ServiceFamilyInfo 01/09/2020 200AM 01/09/2020 120AM Completed Successfully 69834 Check For Case Manage Assignments 01/09/2020 100AM 01/09/2020 120AM Completed Successfully 69833 LSA Staiging Data Clean-up 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69832 AutoRun_Service Checkin Month 01/09/2020 100AM 01/09/2020 118AM Completed Successfully 69833 EDI Remove Past Staging Records 01/09/2020 100AM 01/09/2020 117AM Completed Successfully 69832 Auto Biabi Clean-up 01/09/2020 100AM 01/09/2020 117AM Completed Successfully 69831 EDI Remove Past Staging Records 01/09/2020 100AM 01/09/2020 107AM Completed Successfully 69832 Auto Diabid User 01/09/2020 100AM 01/09/2020 100AM 01/09/2020 107AM Completed Successfully 69828 Auto-Diabid User 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69828 Auto-Dost Enroliment Services 01/09/2020 100AM 01/09 | | Run CSV Export - HMIS APR/CAPER 2020 Pre-Load | 01/09/2020 3:19PM 01/09/2020 3:26PM | Completed Successfully 69837 |
| Missing ServiceFamilyInfo 01/09/2020 20.0AM 01/09/2020 212.AM Completed Successfully 69834 Check For Case Manager Assignments 01/09/2020 20.0AM 01/09/2020 20.0AM Completed Successfully 69833 LSA Staging Data Clean-up 01/09/2020 10.0AM 01/09/2020 10.9AM Completed Successfully 69833 AutoRuis_Envice Checkin Month 01/09/2020 10.0AM 01/09/2020 10.9AM Completed Successfully 69831 EDI Remove Past Staging Records 01/09/2020 10.0AM 01/09/2020 10.9AM Completed Successfully 69830 Remove Dia WorkFlowinstraces 01/09/2020 10.0AM 01/09/2020 10.9AM Completed Successfully 69839 Auto Diabet User 01/09/2020 10.0AM 01/09/2020 10.9AM Completed Successfully 69839 Auto Diabet User 01/09/2020 10.0AM 01/09/2020 10.9AM Completed Successfully 69829 Auto-Doabe Referral 01/09/2020 10.0AM 01/09/2020 10.9AM Completed Successfully 69827 Auto-Post Enrollment Services 01/09/2020 10.0AM 01/09/2020 11.9AM Completed Successfully 69826 Post housing services 01/09/2020 10.0AM < | | Cache Cleanup | 01/09/2020 5:00AM 01/09/2020 5:06AM | Completed Successfully 69836 |
| Ocheck For Case Manager Assignments 01/09/2020 200AM 01/09/2020 206AM Completed Successfully 69833 LSA Shajing Data Olen-up 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69832 AutoRun_Service Checkin Month 01/09/2020 100AM 01/09/2020 110AM Completed Successfully 69833 EIA Entore Past Staging Records 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69839 Remove Old WorkFlowinstances 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69839 Auto Disable User 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69829 Auto-Disable User 01/09/2020 100AM 01/09/2020 107AM Completed Successfully 69829 Auto-Disable User 01/09/2020 100AM 01/09/2020 107AM Completed Successfully 69829 Auto-Disable User 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69829 Auto-Disable User 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69829 Posthousing services 01/09/2020 100AM 01/09/2020 100AM Compl | | End Expired Enrollment Accounts | 01/09/2020 4:00AM 01/09/2020 4:06AM | Completed Successfully 69835 |
| LSA Staging Data Clean-up 01/09/2020 100AM 01/09/2020 109AM Completed Successfully 69832 AutoRun_Service Checkin Month 01/09/2020 100AM 01/09/2020 109AM Completed Successfully 69832 EDI Remove Past Staging Records 01/09/2020 100AM 01/09/2020 109AM Completed Successfully 69832 Remove Old WorkFlowInstances 01/09/2020 100AM 01/09/2020 107AM Completed Successfully 69839 Auto Disable Ueir 01/09/2020 100AM 01/09/2020 107AM Completed Successfully 69829 Auto Disable Ueir 01/09/2020 100AM 01/09/2020 106AM Completed Successfully 69829 Auto-Disable Ueir 01/09/2020 100AM 01/09/2020 106AM Completed Successfully 69829 Auto-Disable Enrollment Services 01/09/2020 100AM 01/09/2020 117AM Completed Successfully 69827 Auto-Post Enrollment Services 01/09/2020 100AM 01/09/2020 116AM Completed Successfully 69826 Post housing services 01/09/2020 100AM 01/09/2020 116AM Completed Successfully 69825 | | Missing ServiceFamilyInfo | 01/09/2020 2:00AM 01/09/2020 2:12AM | Completed Successfully 69834 |
| AutoRum_Service CheckIn Month 01/09/2020 100AM 01/09/2020 118AM Completed Successfully 69831 © EDI Remove Past Staging Records 01/09/2020 100AM 01/09/2020 100AM 00/09/2020 100AM 00/09/2020 100AM 00/09/2020 100AM 00/09/2020 100AM 00/09/2020 100AM 60/09/2020 100AM 60/09/2 | | Check For Case Manager Assignments | 01/09/2020 2:00AM 01/09/2020 2:06AM | Completed Successfully 69833 |
| EDI Remove Past Staging Records 01/09/2020 100AM 01/09/2020 109AM Completed Successfully 69830 Remove Did WorkFlowInstances 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69829 Auto Disable User 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69829 Auto Cose Referral 01/09/2020 100AM 01/09/2020 100AM Completed Successfully 69827 Auto-Post Enrollment Services 01/09/2020 100AM 01/09/2020 117AM Completed Successfully 69827 Post housing services 01/09/2020 100AM 01/09/2020 117AM Completed Successfully 69827 | | | 01/09/2020 1:00AM 01/09/2020 1:09AM | Completed Successfully 69832 |
| O Remove Old WorkFlowInstances 01/09/2020 100AM 01/09/2020 107AM Completed Successfully 69829 | | - | 01/09/2020 1:00AM 01/09/2020 1:18AM | Completed Successfully 69831 |
| Auto Disable User 01/09/2020 100AM 01/09/2020 106AM Completed Successfully 69828 Auto-Disable User 01/09/2020 100AM 01/09/2020 110AM Completed Successfully 69827 Auto-Post Enrollment Services 01/09/2020 100AM 01/09/2020 116AM Completed Successfully 69828 Post housing services 01/09/2020 100AM 01/09/2020 116AM Completed Successfully 69826 | | | | |
| | | - | | |
| Auto-Post Enrollment Services 01/09/2020 1:00AM 01/09/2020 1:16AM Completed Successfully 69826 Post housing services 01/09/2020 1:00AM 01/09/2020 1:12AM Completed Successfully 69825 | | - | | |
| Post housing services 01/09/2020 1:00AM 01/09/2020 1:12AM Completed Successfully 69825 | | | | |
| | | · | | |
| | | | 01/09/2020 1:00AM 01/09/2020 1:12AM | Completed Successfully 69825 |
| | | | | 🗙 Cancel |
| | | | | ,a |

| Task List | | | | X |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|------------------|------------------------|----------|
| 🔍 Asynchronous Tasks | | | 📰 🕕 👔 | X# 🚔 ? |
| Below is a listing of tasks that are either queued to be complete details folder to the left of the task. To view a log of the task exec task begins its execution at the next available time based on over Show only my tasks: Refreshing in 15 seconds 10 Seconds 10 Refresh Now | cution, upon task processing, (| | | |
| | Displaying 1-200 of 601 resul | ts. 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 | 01/09/20203:26PM | 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

| | Reports | ClientTrack 🐂 🐴 📶 Search 🔍 | | Patty Estrada Help | Sign Ou |
|---|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|---------|
| | Data Explorer | | | | |
| < | Files on Server | Welcome Patty Estrada | | | |
| | BNLS HMIS Active Client List | Community Housing and Shelter Services News City of Modesto Stanislaus County | | | 4 |
| | HMIS BNL Veterans | Welcome to ClientTrack | | | |
| | HMIS EXPORTS HMIS REPORTS | The HMIS System for Stanislaus Community System of Care Colla | aborative | | |
| | ADMINISTRATIVE REPORTS | Administered by the City of Modesto | | | |
| | CLIENT REPORTS | Contact Information: | | | |
| | ENROLLMENT REPORTS | HMIS Coordinator: Lynnell Fuller (209) 577-5211, E-mail: Lfuller@ | modestogov.com | | |
| | REFERRAL REPORTS | Help Information: Use the Help Topics link or contact the HMIS Coordinator. | | | |
| | REPORTS | | | | |
| | SERVICE REPORTS | Current Program Enrollments | | | - |
| | | | 150 | | |
| | | Program Cases Clients CHSS BHRS 8 10 CHSS CASUBILITION Program RRH 4 15 CHSS PMID File 14 14 CHSS CASUBILITION Program RRH 4 15 CHSS PMID File 1 2 CHSS PMID File 1 2 CHSS PMID File 1 2 CHSS PMID File 3 8 CHSS PMID File 2 3 CHSS TARF Filedeel Woothers 15 61 | 20 0 defender and and and a start defender and and a start and a s | | |

*Note: Files On Server can aslo 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

| on serve | d below is r click the | s a list of the files available for you to download. Files may be available for a limited time they expire, and will be autor delete link. The file will no longer be available for download by any user or be available for processing if used in an in tatus of export or import tasks. | | ate specified. To download the file click th | e download link, to remove the file from file |
|--------------|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------------------------|-----------------------------------------------|
| | | File Name | Creator | Created | Expires |
| <u>_</u> | × | 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 |
| \mathbf{i} | × | 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.

| NI S | | | ist of the files available for you to download. Files may be available for a limited time they evolve and will be automat | |
|-------------------------|--------------|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| | on server of | lick the del | ist of the files available for you to download. Files may be available for a limited time they expire, and will be automat lete link. The file will no longer be available for download by any user or be available for processing if used in an impo | rt once del |
| | Click to vie | w the statu | is of export or import tasks. | |
| HMIS Active Client List | | | File Name | Creator |
| HMIS BNL Veterans | | | HMIS APR_CAPER 2020 Validation_20200109213653.exe 👔 | Patty Estr |
| MIS EXPORTS | | | HMIS APR_CAPER 2020 Pre-Load_20200109212608 exe | Patty Est |
| MIS REPORTS | * | | | Tatty Lou |
| DMINISTRATIVE REPORTS | | | | |
| LIENT REPORTS | | | | |
| NROLLMENT REPORTS | | | Downloading HMIS APR_CAPER 2020 Pre-Load_2020010 | |
| | | | You should have received a download prompt, however if you see an informatio bar, you may need to click it to allow the download or you can try <u>clicking here</u> . | |
| EFERRAL REPORTS | | | | |
| EPORTS | | | This window will automatically close in 8 seconds. | |
| ERVICE REPORTS | | | Close Window | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| HMIS APR_CAPERexe | | | | |
|) 👔 HMIS APR_CAPERexe 🔨 | | | | |
| ∭a HMIS APR_CAPERexe ∧ | | | | |
| 溢 HMIS APR_CAPERexe へ | | | | |
|) HMIS APR_CAPERexe ^ | | | | |
| Mit HMIS APR_CAPERexe ^ | | | | |
| HMIS APR_CAPERexe A | | | | |
| | | | | |
| | | | | |
| | | | Open | |
| | | | Open | |
| | | | Open Always open files of this type | |
| | | | Always open files of this type | |
| HMIS APR_CAPERexe | | | | |
| | | | Always open files of this type | |

| and a | Click to | view the stat | tus of export or import tasks. | |
|-------------------------|--------------------------------------------------------------------------|---------------|-----------------------------------------------------------------------------------|---------------|
| HMIS Active Client List | | | File Name | Creator |
| HMIS BNL Veterans | | × | HMIS APR_CAPER 2020 Validation_20200109213653.exe 👔 | Patty Estrada |
| | | × | HMIS APR 2020 Export_20200109213637 exe 🚱 | Patty Estrada |
| HMIS EXPORTS | | × | HMIS APR_CAPER 2020 Pre-Load_20200109212608.exe 👩 | Patty Estrada |
| HMISTREPORTS | | | | |
| ADMINISTRATIVE REPORTS | | | | |
| CLIENT REPORTS | | | Downloading HMIS APR 2020 Export_20200109213637.e | |
| ENROLLMENT REPORTS | | | You should have received a download prompt, however if you see an information | |
| REFERRAL REPORTS | | | bar, you may need to click it to allow the download or you can try clicking here. | |
| REPORTS | | | | |
| CERVICE REPORTS | | | This window will automatically close in 13 seconds. Close Window | .ef |
| | Open when done Always open files Pause Show in folder Cancel | of this type | Sometimes you may get the option, Open when done. | |
| HMIS APR 2020 Exexe > | | | | |

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

| Open File | open File - Security Warning | | | |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|
| | ublisher could not be verified. Are you sure you want to software? | | | |
| | Name:Iler\Downloads\ESG_Caper_20170314222409.exe | | | |
| | Publisher: Unknown Publisher | | | |
| | Type: Application | | | |
| | From: C:\Users\Ifuller\Downloads\ESG_Caper_2017031 | | | |
| | Run Cancel | | | |
| 🔽 Alwa | ays ask before opening this file | | | |
| 8 | This file does not have a valid digital signature that verifies its publisher. You should only run software from publishers you trust. <u>How can I decide what software to run?</u> | | | |

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

| | 1 | | #1 | |
|----------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------|-------------------------------------------------------|---|
| Enter the password to ex | tract the file(s) | propriate cautions should be exercised | to ensure the | |
| the information contained v responsibility of ensuring th this data once it is no longer applicable local, state, and f | information. Data Systems International (D) ithin the file(s). By checking the following security of the file(s) and any data cont needed. Users of this extraction tool sho ederal laws governing the protection of p to for the security of the extracted f | | sume the full of properly deleting cedures, and | |
| Enter or select the direct | 1 | | | |
| View files after extract If the file(s) already exist | | | | |
| | | | | # |
| | | | | |

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

| Ka Extract Encrypted File(s) | Heading 2 Title |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|
| ClientTrack | |
| Enter the password to extract the file(s) | _ |
| •••••••• These files have been encrypted to protect personally identifying information. Once the file(s) have been extracted and decrypted | |
| they may contain personally identifying information in plain text. All appropriate cautions should be excised to an uce type continued protection of this information. Data Systems International (DSI) is not responsible for the protection, use, or misuse of the information contained within the file(s). By checking the following box, you acknowledge that you will assume the full responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within, including the responsibility of ensuing the security of the file(s) and any data contained within and the security of the file(s) and any data contained within and the security of the extent of the security of the sextent of the s | |
| ✓ I assume responsibility for the security of the extracted file(s) | acteu mes: |
| Enter or select the directory to extract to | |
| | Assessment |
| Custom Offi | ce Templates |
| | , |
| If the file(s) already exist Overwrite silently - | |
| ESG CAPEL | |
| | • |
| Folder: C:\Users\fulle | r \Documents \ESG \ESG CAPER TE |
| Show Contents | Cancel |
| C:\Users\inuier\Downloads | |
| View files after extraction | |

| | Browse For Folder | × | |
|---------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|----------------------------------|
| | | | |
| | Select a folder for the extracted file | S: | |
| - | Custom Office Temp | lates | |
| | Data Quality | | |
| | Data Standards | | |
| | Duplicate | | |
| | ESG B ESG CAPER TEST | | |
| | New folder | | |
| | ESG NEW TEST | - | |
| | ■ E 1 1 5 4 | - F | |
| | Folder: C:\Users\fuller\Docume | nts\ESG\New folder (2) | |
| t | Make New Folder O | Cancel | |
| | | | |
| Extract Encrypted File(s) | | | × |
| ClientTra | ıck™ | | |
| Enter the password to | extract the file(s) | | |
| ••••• | | | |
| they may contain persor | crypted to protect personally identifying infor nally identifying information in plain text. All a | ppropriate cautions should be exercised to | o ensure the |
| the information contain | this information. Data Systems International (ed within the file(s). By checking the following | box, you acknowledge that you will assur | me the full |
| this data once it is no lor | g the security of the file(s) and any data conta nger needed. Users of this extraction tool shou nd federal laws governing the protection of pe | ld consult their employer's policies, proce | dures, and |
| | ibility for the security of the extracted fil | | ondi galadireei |
| Enter or select the dire | | -(-) | |
| C:\Users\lfuller\Docum | - | | |
| | iend/coolcoo careit icoi | | |
| View files after ext | | | |
| | racting | | ll is showing |
| View files after ext | racting | | |
| View files after ext | racting | | ll is showing |
| View files after ext | racting | | ll is showing |
| View files after ext | racting | | ll is showing |
| View files after ext | racting | | ll is showing |
| View files after ext | racting | correctly | Il is showing then Extract |
| View files after ext If the file(s) already ex | racting | Show Contents Extract | Il is showing t, then Extract |
| View files after ext | racting | Show Contents Extract | Il is showing then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing t, then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing t, then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing t, then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing t, then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing t, then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing t, then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing t, then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing t, then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing , then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Correctly Show Contents Extract Enter or select the directory to extract to | Il is showing t, then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing t, then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing t, then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing t, then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing t, then Extract |
| View files after ext If the file(s) already ex | racting ist Dverwrite silently | Show Contents Extract | Il is showing t, then Extract |

| ClientTrack™ | | je avalu | and will be automatia | l will be automatically remained an the dat | | | |
|---------------------------------|--------------------------------------------------------|----------------------------------------------|-------------------------|---------------------------------------------|------|---|--|
| | → Network → comfilesrv1.modesto.prv → Pro | ofiles 🔸 Ifuller 🕨 Desktop 🕨 New folder (19) | √ 4 ₇ | Search New folder (| (19) | _ | |
| | File Edit View Tools Help | | | | | | |
| | Organize New folder | | | | ···· | | |
| Finished extracting 37 entries. | | | | _ | | _ | |
| | E Desktop | Name | Date modified | Туре | Size | | |
| | Downloads | Q4a.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| File 36 of 37 | 🕮 Recent Places | 🖳 Q5a.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| | | 🖳 Q6a.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| | Documents | 🔊 Q6b.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| | Documents Music | 🖳 Q6c.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| | - | 🖳 Q6d.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| | Pictures | 🖳 Q6e.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| | Videos | 🔊 Q6f.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| | | 🖾 Q7a.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| | Computer | 🖳 Q8a.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| | Windows (C:) | E Q8b.csv | | | 1 KB | | |
| | DVD Drive (D:) HP DJ1010 | 🖳 Q9a.csv | Once compl | | 1 KB | | |
| | Removable Disk (F:) | 🖏 Q9b.csv | the files | will be | 1 KB | | |
| | | 🖳 Q10a.csv | displa | | 1 KB | | |
| | If p financial information (\\comfilesrv1\shared) (Q:) | 🖳 Q10b.csv | uispia | yeu | 1 KB | | |
| | | 🖳 Q10c.csv | | | 1 KB | | |
| | | 🖏 Q10d.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| | Toolbox (\comfilesrv1\SHARED) (W:) | 🖏 Q11.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| | TOOIDOX (((commestv1(SHARED) (W:) | 🖳 Q12a.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| | + Network | 🖺 Q12b.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| CSV - APR 2017 Export | | 🔊 Q13a1.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |
| HMIS APR-ESG 6.1 - P | 1 | 👻 🖳 Q13b1.csv | 11/2/2017 12:13 PM | Microsoft Excel C | 1 KB | | |

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


| 🛃 Q13c1 | 3/14/2017 3:24 PM | - 1 | Microsoft Excel C | 1 KB |
|---------|-------------------|-------|----------------------------|------|
| 🛃 Q14a | 3/14/2017 3:24 PM | 1 | Microsoft Excel C | 1 KB |
| 🛃 Q14b | 3/14/2017 3:24 PM | | Microsoft Excel C | 1 KB |
| 🔹 Q15 | 7-Zip → | | Microsoft Excel C | 2 KB |
| 🛃 Q20a | | | Microsoft Excel C | 1 KB |
| 🛃 Q21 | Share with | | Microsoft Excel C | 1 KB |
| 🖫 Q22a2 | Send to | | Bluetooth File Transfer | |
| Q22c | Cut | and a | Compressed (zipped) folder | |
| 📳 Q22d | | | Desktop (create shortcut) | |
| 🔁 Q23 | Сору | | Documents | |
| Q23a | Create shortcut | | Fax recipient | |
| Q23b | Delete | | Mail recipient | |
| Q24 | Rename | 2 | DVD RW Drive (D:) | |
| 📳 Q25a | Droportion | _ | Local Disk (E:) | |
| 📳 Q26b | Properties | | | |
| | | - | Section8 (\\hacspdc) (F:) | |
| | | - | share (\\hacspdc) (S:) | |



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

| | 🛃 Q25a | 3/29/2016 4:47 PM | Microsoft Excel C | 1 KB |
|---|-------------------------------|---------------------------------------------------------------------------------------|-------------------|-------|
| | 🔁 Q26b | 3/29/2016 4:47 PM | Microsoft Excel C | 1 KB |
| | Test ESG CAPER 3.29.2016 LF | 3/29/2016 11:10 AM | Compressed (zipp | 16 KB |
| - |] Z Test ESG CAPER 3.29.16 LF | 3/29/2016 5:01 PM | Compressed (zipp | 14 KB |
| | | Type: Compressed (zipped) Folder Size: 13.1 KB Date modified: 3/29/2016 5:01 PM | | |

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

| 🕞 🗢 🗼 🕨 Lynnell Fuller 🕨 Dov | vnloads 🕨 | | | | Search Downloo | ads |
|---------------------------------|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-------------|----------------|-----|
| Organize 👻 Include in library 👻 | Share v | vith 🔻 Burn New folder | | | | |
| ⊿ 🔆 Favorites | <u>^</u> | Name | Date modified | Туре | Size | |
| Desktop | |) [2] ESG_Caper_20160329234750 (1) | 3/29/2016 4:53 PM | Application | 1,850 KB | |
| Downloads | |)🔏 ESG_Caper_20160329234750 | 3/29/2016 4:50 PM | Application | 1,850 KB | |
| C Descrit Disease | | Property in the second | 2/20/2016 12 50 514 | VERI D | | |

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.

| 🔆 Favorites | ^ | Name | Date modified | Туре | Size | _ itle |
|-----------------------------|----------|------------------------------------------|--------------------|------------------------|--------------------------------------------------|---------------------------------|
| 🥅 Desktop | |) [2] ESG_Caper_20160329234750 (1) | 3/29/2016 4:53 PM | Application | 1,850 KB | |
| \rm Downloads | |) ESG_Caper_20160329234750 | 3/29/2016 4:50 PM | Application | 1,850 KB | |
| 归 Recent Places | | ClientTrackExport | 3/29/2016 12:50 PM | XML Document | 39 KB | |
| left SkyDrive | E | ClientsInPrograms (2) | 3/29/2016 12:39 PM | Microsoft Word D | 36 KB | |
| | | ClientTrackExport | 3/29/2016 11:50 AM | Microsoft Excel W | 62 KB | |
| 潯 Libraries | | 😰 New+User+Training+for+Family+Provid | 3/29/2016 8:15 AM | Microsoft PowerP | 1,907 KB | |
| Documents | | ClientsInPrograms (1) | 3/28/2016 2:13 PM | Microsoft Word D | 50 KB | |
| 👌 Music | |) ESG_Caper_20160328200724 | 3/28/2016 1:15 PM | Application | 1,836 KB | |
| Pictures | | HMIS_MOU_w_Exhibits_FINAL_20140325 | 3/28/2016 12:14 PM | Microsoft Word D | 78 KB | |
| 😸 Videos | | Santa-Cruz-Adult-Intake-2016 | 3/28/2016 12:06 PM | Microsoft Word D | 136 KB | |
| | | HUDRequiredPosting (1) | 3/28/2016 12:05 PM | Microsoft Word 9 | 23 KB | earc |
| 🖳 Computer | | CHIN_MOU_120913 (1) | 3/28/2016 10:38 AM | Microsoft Word M | 48 KB | |
| 🏭 OS (C:) | | 💼 Data-Sharing-Agreement-Sample (1) | 3/28/1 Delete File | Second Street, | 10.00 | × |
| 🖵 Section8 (\\hacspdc) (F:) | | 💼 Data-Sharing-Agreement-Sample | 3/28/2 | | | |
| 🖵 share (\\hacspdc) (S:) | | 👍 HMIS-APR-Generation-Tool-Version-4-0 | 3/28/2 Ar | e you sure you want to | o move this file to the Re | ecycle Bin? |
| | |) HMIS RHY CSV 4.1 Export_20160325230727 | 3/25/2 | | ESG_Caper_2016032923 | 4750 (1) |
| 辑 Network | |) HMIS RHY CSV 4.1 Export_2016032422520 | 3/25/2 | | | is program to extract the files |
| 👰 2Z3HTW1 | |) HMIS RHY CSV 4.1 Export_2016032422520 | 3/25/2 | | encrypted in ClientTrac File version: 1.9.1.5 | :k. |
| 🖳 C12464 | |) HMIS RHY CSV 4.1 Export_2016032322520 | 3/25/2 | | Date created: 3/29/2016 | 4:53 PM |
| P2BZDVG1 | |) HMIS RHY CSV 4.1 Export_2016032322520 | 3/25/2 | | Size: 1.80 MB | |
| 👰 D2HTJDK1 | |) HMIS RHY CSV 4.1 Export_2016032322520 | 3/25/2 | | | |
| 👰 D2HVJDK1 | | ESG-CAPER-Reporting-Tool-and-eCart | 3/25/2 | | | |
| 💻 D3Q4MDK1-COLED | - | a ESG_Caper_20160325200808 | 3/25/2 | | | Yes No |

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 the bring up the locked running file





Once the Extrac Encrupted Files screen is showing click on Quit

| Extract Encrypted File(s) | | | X |
|---------------------------------|---------------|------------|----------|
| ClientTrack | | | |
| | | | |
| Finished extracting 33 entries. | | | |
| File 32 of 33 | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | _ | |
| | Show Contents | Extracted. | Quit |

Then Try Again



Go to your Recylce 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?"

| Delete M | ultiple Items X |
|----------|-----------------------------------------------------------------------|
| | Are you sure you want to permanently delete these 71 items? Yes No |

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

| File Edit View Tools Help | | | | | | |
|---------------------------|------|-------------------|--------------|------|--------------------------|---------------|
| Organize 👻 | | | | | | |
| 🖌 🙀 Favorites | Name | Original Location | Date Deleted | Size | Item type | Date modified |
| 🧮 Desktop | | | | | | |
| 🚺 Downloads | | | | | | |
| 🔛 Recent Places | | | | | | |
| | | | | | | |
| 4 🥽 Libraries | | | | l Yo | ur Recvcle | e Bin 🔰 |
| Documents | | | | | | |
| 🖻 🌙 Music | | | | sh | ur Recycle ould be en | npty |
| Pictures | | | | | | |
| Videos | | | | | | |
| ▷ 🜉 Computer | | | | | | |
| > 🗣 Network | | | | | | |

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 lauched, 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.

| 🗧 🛨 🖪 HMIS RHY Export - CSV 2020 | | | |
|-----------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| Export RHY data in the HMIS CSV 2020 Standard th | e data included will fit the filters that are selected | The Source tune is not used to filter the data it is only used as nort of the expect file | |
| | | | |
| | Source End Point:* | asdf • | |
| | | | |
| urce Type - Identify where the export is being gener | ded from. This populates fields in the Export.csv. | It is not a CoC Filter. | |
| | Source Type: * | Continuum-Operated HMIS * | |
| | State Filter:* | | |
| | Continuum of Care Code (CoC):* | Turlock/Modesto/Stanislaus County CoC | |
| te Range - indicate the time period for t is export. O ed for the Export Start Date. | nly enrollments that were active at some point wi | thin the date range you select will be included. However, all data associated with those error | liments, up to the end date will be included. The start date of the SSVF grant (or earlier |
| | Predefined Date Range: | - SELECT • | |
| | Enrollments active between: | 07/01/2018 and 01/10/2020 | |
| | Export Date: | 01/10/2020 004:20 | |
| panization(s) - Indicate which organizations should | be included in the report by selecting each organic | zation separately, or click the 🖋 icon to select all. Note: The list only shows organizations yo | ou are authorized to view. |
| | Organization(s):* | | |
| | | CARE of Stanislaus County Catholic Charities of the Diocese of Stockton | |
| | | Center For Human Services | |
| | | Children's Crisis Center CICV | |
| | | CICV | |
| | lected programs. When checked, the list displays | programs that belong to the organizations you selected above. Indicate which programs sh | rould be included in the report by selecting each program separately, or click the ψ ic |
| gram(s) - Check the box to limit report esults by se | | | |
| gram(s) - Check the box to limit report esults by se | Drogram(e): | # Filter by Program(s) | |
| gram(s) - Check the box to limit report esuits by se | Program(s): | Filter by Program(s) CES Coordinated Access | |
| gram(s) - Check the box to limit report esuits by se | Program(s): | CES Coordinated Access CHS HUTTON BCPHP | |
| gram(s) - Check the box to limit report esuits by s | Program(s): | CES Coordinated Access CHS HUTTON BCPHP CHS Hutton RHY BCP | |
| gram(s) - Check the box to limit report esuits by sr | Program(s): | CES Coordinated Access CHS HUTTON BCPHP CHS HUTTON BCPHP CHS Pathways Other CHS Pathways RHY TLP | |
| gram(s) - Check the box to limit report esuits by s | Program(s): | CES Coordinated Access CHS HUTTON BCPHP CHS Hutton RHY BCP CHS Pathways Other | |
| | | CES Coordinated Access CHS HUTTON BCPHP CHS HUTTON BCPHP CHS Pathways Other CHS Pathways RHY TLP | ded in the sport by selecting each grant separately, or click the 🛹 icon to select all. |
| | | CBS Coordinited Access CHS HUTTON BCPHP CHS HUTTON BHY BCP CHS Pathways Other CHS Pathways RHY TUP CHS RHY Street Outreach | del in the sport by selecting each gurd separately, or click the 🖝 con to select all |



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

| ClientTrack= Reports & All Search Q | | 🌲 Patty Estrada (Training) Help Sign Out |
|-------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| | | |
| 🗧 👷 🖪 HMIS RITY Export - GSV 2020 | | |
| Export RHY data in the HMS COV 2020 Standard the data included will fit the filters that | are selected. The Source type is not used to filter the data it is only used as part of the export file. | |
| | | |
| | End Point:* asdf • | |
| Source Type - Identify where the export is being generated from. This populates fields in th | e Export csv. It is not a CoC Filter | |
| | urce Type * [Continuum-Operated HMIS *] | |
| | tate Filter.* California • | |
| Continuum of Care of | | |
| Date Range - Indicate the time period for this export. Only enrollments that were active at used for the Export Start Date | If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long. | up to the end date will be included. The start date of the SSVF grant (or earlier) should b |
| Predefined D Enrollments activ | If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information. | |
| E | Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should always be enclosed in double- quotes. | |
| Organization(s) - Indicate which organizations should be included in the report by selectin | Encrypt export: Ø | thorized to view. |
| Orga | Password:* | |
| | Confirm Password: • | |
| | mekuda Header Row in CSV 💡 | |
| | Always Quote CSV Values(s); | |
| Program(s) - Check the box to limit report results by selected programs. When checked, the | nimoja duote con ninoca(a). | included in the report by selecting each program separately, or clicit the 🛹 icon to selec |
| | | |
| | | |
| | Don | |
| | Liss Patiways other | |
| | CHS Pathways RHY TLP CHS RHY Street Outreach | |
| Grant(s) - Check the box to limit report results by selected grants. When checked, the list d | solave grants that belong to the organizations you selected above. Indicate which grants should be included in | The report by selecting each grant separately or clicil the of icon to select all |
| | Grantin) # Filter by Grant(s) | |
| | ST CHS Hutton RHY BCP | |
| | d Recorda: 🗶 | |
| | | |

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

| https://usw.clienttrack.net/15/MainPage.aspx?Inline=false | | | G |
|-----------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| ClientTrack" Reports # All Search Q | usw.clienttrack.net sa | ys | 🌲 Patty Estrada (Training) Help Sign Out |
| | Your export has been qu available time. | eued and will be processed at the next | |
| 🗧 ★ 📕 HMIS RHY Export - CSV 2020 | | ок | B () () () |
| Export RHY data in the HMIS CSV 2020 Standard the data included will fit the filters that | t are selecter | viie. | |
| | | | |
| Source | End Point:* asdf | | |
| Source Type - Identify where the export is being generated from. This populates fields in the | ne Export.csv. It is not a CoC Filter. | | |
| So | urce Type:* Continuum-Operated I | HMIS Y | |
| | itate Filter:* California | | |
| Continuum of Care C | Export Encryption | | |
| Date Range - Indicate the time period for this export. Only enrollments that were active at used for the Export Start Date. | If you encrypt the export, the generate that can only be decrypted using the p the password you provide must be at | d exports will be zipped and encrypted using 256 bit AES encryption assword you provide. Strong passwords are not enforced here, but least 8 characters long. | up to the end date will be included. The start date of the SSVF grant (or earlier) should be |
| Predefined D Enrollments activ | If you choose to not to encrypt your er plain text. All appropriate cautions sho | cort, the file exported may contain person identifying information is ould be exercised to ensure the protection of this information. | n |
| E | each of the values in the CSV file repre- | nclude a header line at the beginning of the file that indicates what esent and if values in the CSV should always be enclosed in double- | |
| Organization(s) - Indicate which organizations should be included in the report by selectin | quotes. | | thorized to view. |
| Orga | Encrypt Export: | | |
| | Password:* | | |
| | Confirm Password:* | | |
| | Include Header Row in CSV File(s): | 8 | |
| | | | |
| Program(s) - Check the box to limit report results by selected programs. When checked, th | | | included in the report by selecting each program separately, or click the 💓 icon to select |
| di, | | | |
| | | | |
| | | | |
| | CHS Pathways Othe | | |
| | CHS Pathways RHY | TLP | |
| | CHS RHY Street Out | reach | |
| Grant(s) - Check the box to limit report results by selected grants. When checked, the list d | lisplays grants that belong to the organize | ations 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): Silter by Grant(s) | | |
| Exclude Deleter | CHS Hutton RHY BC | * · · | |
| Exclude Delete | u Recolus. | | |
| | | | 👔 Run Export |

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"

| = Value - I Devede to All Cearch | Q | | 🌲 Patty Estrada (Training) Help Sign Out |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| E ClientTrack Reports to All Search | A | | Patty Estrada (Training) Help Sign Out |
| 7 | | | |
| Files on Server | | | |
| Displayed below is a list of the files available for you to download. Files may be will no longer be available for download by any user or be available for processi | available for a limited time they expire, and will be autor ng if used in an import once deleted. | natically removed, on the date specified. To download the file click the | te download link, to remove the file from file on server click the delete link. The file |
| Click to view the status of export or import tasks. | | | |
| File Name | Creator | Created | Expires |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| and the second se | | | |

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

| lick to view the status of export or import tasks. | | | | |
|----------------------------------------------------|----------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|------------------|
| File Name | Task List | | | × |
| | Asynchronous Tasks | | 💭 🕕 at N | |
| | detail, click the view details folder to the left | used to be completed or that have been completed in the of the task. To view a log of the task execution, upon tas task begins its execution at the next available time base task. Refresh Now | k processing, completion or | l task error, |
| | | Displaying 1-200 of 602 results. Next Last | | |
| | Task Name + | Desired Start Time A End Time A | Status | TaskiD 🕶 |
| | Run CSV Export, HMIC Bury COV 2020 Expo Cache Cleanup | | | 69855 |
| | · · · · · · · · · · · · · · · · · · · | | Completed Successfully | 69853 |
| | End Expired Enrollment Accounts | | Completed Successfully | 69852 |
| | V Missing CourseEam Minfo | | Completed Successfully | 69851 |
| | Check For Case Manager Assignments | | Completed Successfully | 69850 |
| | LSA Staging Data Clean-up | | Completed Successfully | 69849 |
| | AutoRun_Service CheckIn Month | | Completed Successfully | 69848 |
| | EDI Remove Past Staging Records | 01/10/2020 1:00AM 01/10/2020 1:10AM | | 69847 |
| | Remove Old WorkFlowInstances | 01/10/2020 1:00AM 01/10/2020 1:09AM | Completed Successfully | 69846 |
| | Auto Disable User | 01/10/2020 1:00AM 01/10/2020 1:07AM | | 69845 |
| | Auto olono Doformi | 01/10/2020 1-00444 01/10/2020 1-10444 | | \$004A |
| | | | | K Cancel |

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

| Reports | ClientTrack- | Q | | Patty Estrada Help | Sign |
|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|------------------------------------------------|----------------------|------|
| Data Explorer | | | | | |
| Files on Server | Welcome Patty Estrada | | | | 1 |
| BNLS HMIS Active Client List | Community Housing and Shelter Services News City of Modesto Stanislaus County | | | | |
| HMIS BNL Veterans | Welcome to ClientTrack | | | | |
| HMIS EXPORTS HMIS REPORTS | The HMIS System for Stanislaus Community | System of Care Collaborative | | | |
| ADMINISTRATIVE REPORTS | Administered by the City of Modesto | | | | |
| CLIENT REPORTS | Contact Information: HMIS Coordinator: Lynnell Fuller (209) 577-5 | 211 E maile fuller@madesters | | | |
| ENROLLMENT REPORTS REFERRAL REPORTS | Help Information: Use the Help Topics link or contact the HMIS Coordinator. | | | | |
| REPORTS | | | | | |
| SERVICE REPORTS | Current Program Enrollments | | | | |
| | | | 150 | | |
| | Program Cases | Cients | 100 | | |
| | CHSG BieldS E CHSS CA Stabilization Program RRH E CHSS CA Stabilization Program RRH E CHSS Households In Recovery 12 CHSS Households In Recovery 12 CHSS HARD Stabilization Program RRH 1 CHSS HARD Stabilization Program RRH 1 CHSS HARD Stabilization Program RRH 1 CHSS HARD HIM CHLID FIZ 1 CHSS TANF/Hodel Vocations 37 CHSS Wride 15 | 10 16 41 2 1 8 14 114 | | | |
| | | | and a support of the support of the support of | Streetwood Or | |

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

| Ξ | ClientT | 「rack™ | Reports \$ All Search | Q | | | | 🜲 Patty Estrada (Training) Help Sign Out |
|---|-------------------------------|----------------------------------|----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|-------------------------------------------------|----------------------------------|---------------------------------------------------------|----------------------------------------------------------|
| ? | | | | | | | | |
| | Files on Serve | er | | | | | | |
| | Displayed be will no longe | elow is a list er be availabl | of the files available for you to download. Fil le for download by any user or be available for | les may be available for a limited time they e or processing if used in an import once dele | expire, and will be automatically remo tted. | wed, on the date specified. To d | ownload the file click the download link, to remove the | file from file on server click the delete link. The file |
| | Click to view | the status o | of export or import tasks. | | | | | |
| | | | File Name | | | Creator | Created | Expires |
| (| | × | HMIS RHY CSV 2020 Export_202001102246 | i14.exe 👔 | | Patty Estrada | 1/10/2020 10:46:15 PM | 2/9/2020 10:46:15 PM |

The Report will download, click on open

| 10000 | | t of the files available for you to downlo ole for download by any user or be avail of export or import tasks. | ad. Files may be available for a limite able for processing if used in an imp | d time they expire, and will be automa ort once deleted. | ically removed, on the date specifie | d. To download the file click the download link, to r |
|-------|---|----------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|-------------------------------------------------------------|--------------------------------------|-------------------------------------------------------|
| | | File Name | | | Creator | Created |
| | × | HMIS RHY CSV 2020 Export_2020011 | 0231607.exe 😮 | | Patty Estrada | 1/10/2020 11:16:08 PM |
| | | | | | | |
| | < | Cpen Show in folder | | | | |

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

| ClientTrack [®] Reports to All Search Q | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|
| | |
| #1 | |
| 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 | he file click the download link, to remove the file f |
| bisheled events a had on the analogies they out to commodal. They may be analogies the animed there of explice, on while automatically removed, on the date specified will no longer be available for download by any user on be available for processing if used in an import once deleted. | the me crick the download mit, to remove the me i |
| Click to view the status of export or import task K Extract Encrypted File(s) | |
| Fiel Name | ed 1 |
| HMIS RHY CSV 2020 8 | 2020 11:16:08 PM 2 |
| | |
| ClientTrack [™] | |
| Enter the password to extract the file(s) | |
| | |
| These tiles have been encrypted to protect personality identifying information. Once the file(s) have been extracted and decrypted, | |
| they may contain personally identifying information in plain text. All appropriate cautions should be exercised to ensure the continued protection of this information. Data Systems International (DSI) is not responsible for the protection, use, or misuse of | |
| the information contained within the file(s). By checking the following box, you acknowledge that you will assume the full responsibility of ensuring the security of the file(s) and any data contained within, including the provide the security of the file(s) and any data contained within a security of the file(s). | |
| this data area it is no learner needed. Here of this retreation tool should see will their employee | |
| applicable local, state, and federal laws governing the protection of personally identifying more #2 guidance. | |
| I asyme responsibility for the security of the extracted file(s) | |
| | |
| Exercit select the directory to extract to | |
| C:\Users\pestrada\Downloads | |
| View files after extracting | |
| If the file(s) already exist Determine setup () 7 | |
| | k |
| | \land |
| | |
| | |
| | |
| | |
| Show Contents Extract Cancel | #3 |
| | |
| | |
| | |
| | |



| All Sedicii | | | - |
|---------------------------|---------------|---------------|------|
| Extract Encrypted File(s) | _ | | |
| \ \ | | | |
| • | | | |
| ClientTrack | | | |
| Chent Frack ^m | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| File 13 of 15 | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | Show Contents | Extracting Ca | ncel |
| | | | |

Files will be extracted

All 15 files will be visible

| Name | Date modified | Туре | 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

| 🖺 Client.c | SV | | 11/7/2017 10:17 AM | Microsoft Excel C | 4 KB |
|------------|-------------------|---|--------------------------|-------------------|-------|
| 🖺 Disabili | ties.csv | | 11/7/2017 10:17 AM | Microsoft Excel C | 14 KB |
| 🖺 Employ | mentEducation.csv | | 11/7/2017 10:17 AM | Microsoft Excel C | 3 KB |
| 🖺 Enrollm | ient.csv | | 11/7/2017 10:17 AM | Microsoft Excel C | 4 KB |
| 🖺 Enrollm | entCoC.csv | | 11/7/2017 10:17 AM | Microsoft Excel C | 2 KB |
| 🖺 Exit.csv | | | 11/7/2017 10:17 AM | Microsoft Excel C | 3 KB |
| 🐴 Export.o | LSV. | | 11/7/2017 10:17 AM | Microsoft Excel C | 1 KB |
| 🐴 Funder. | .CSV | | 11/7/2017 10:17 AM | Microsoft Excel C | 1 KB |
| 🖺 Health/ | AndDV.csv | | 11/7/2017 10:17 AM | Microsoft Excel C | 3 KB |
| 🖺 Income | Benefits.csv | | 11/7/2017 10:17 AM | Microsoft Excel C | 5 KB |
| 🕼 Project. | .csv | | 11/7/2017 10:17 AM | Microsoft Excel C | 1 KB |
| 🖺 Project | CoC.csv | | 11/7/2017 10:17 AM | Microsoft Excel C | 1 KB |
| 🖺 Serii | | | 11/7/2017 10:17 AM | Microsoft Excel C | 2 KB |
| | Open | | | | |
| | Print | | | | |
| | Edit | | | | |
| U | Scan for threats | | | | |
| | Send to | • | Compressed (zipped) fol | der | |
| | Cut | | Desktop (create shortcut |) | |
| | Сору | | Documents | | |
| | | | Fax recipient | | |
| | Create shortcut | | Mail recipient | | |

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

| Client | | 3/24/2017 4:46 PM | Microsoft Excel C | 14 KB |
|----------------|----------------------------------------------------------------------------|--------------------|-------------------|-------|
| 🔊 Disabilities | | 3/24/2017 4:46 PM | Microsoft Excel C | 55 KB |
| 🔝 Employmen | tEducation | 3/24/2017 4:46 PM | Microsoft Excel C | 8 KB |
| Enrollment | | 3/24/2017 4:46 PM | Microsoft Excel C | 16 KB |
| 📳 Enrollment | CoC | 3/24/2017 4:46 PM | Microsoft Excel C | 1 KB |
| 🔊 Exit | | 3/24/2017 4:46 PM | Microsoft Excel C | 1 KB |
| 🔊 Export | | 3/24/2017 4:46 PM | Microsoft Excel C | 1 KB |
| 🖬 Funder | | 3/24/2017 4:46 PM | Microsoft Excel C | 1 KB |
| 🚯 HealthAndD | V | 3/24/2017 4:46 PM | Microsoft Excel C | 8 KB |
| 🔝 IncomeBene | efits | 3/24/2017 4:46 PM | Microsoft Excel C | 16 KB |
| 👪 Project | | 3/24/2017 4:46 PM | Microsoft Excel C | 1 KB |
| 🕼 ProjectCoC | | 3/24/2017 4:46 PM | Microsoft Excel C | 1 KB |
| Services | | 3/24/2017 4:46 PM | Microsoft Excel C | 1 KB |
| Services | | 3/27/2017 12:24 PM | Compressed (zipp | 23 KB |
| | Extract All 7-Zip Open with Share with Restore previous versio | ► NS | | |
| | Send to Cut Copy Create shortcut Delete | • | | |
| | Cut Copy Create shortcut | , | | |

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

| Documents library HMIS Reports | | | Arrange by: Folder |
|-----------------------------------|------------------|-------------------|--------------------|
| Name | Date modified | Туре | Size |
| 10222019 RHY.zip | 10/22/2019 11:37 | Compressed (zipp | 18 KB |
| 🖺 Client.csv | 10/22/2019 11:25 | Microsoft Excel C | 8 KB |
| 🔄 Disabilities.csv | 10/22/2019 11:25 | Microsoft Excel C | 37 KB |
| 🖲 EmploymentEducation.csv | 10/22/2019 11:25 | Microsoft Excel C | 3 KB |
| 🔄 Enrollment.csv | 10/22/2019 11:25 | Microsoft Excel C | 5 KB |
| EnrollmentCoC.csv | 10/22/2019 11:25 | Microsoft Excel C | 6 KB |
| 된 Exit.csv | 10/22/2019 11:25 | Microsoft Excel C | 2 KB |
| 🔄 Export.csv | 10/22/2019 11:25 | Microsoft Excel C | 1 KB |
| 🖳 Funder.csv | 10/22/2019 11:25 | Microsoft Excel C | 2 KB |
| 🔄 HealthAndDV.csv | 10/22/2019 11:25 | Microsoft Excel C | 6 KB |
| 🖳 IncomeBenefits.csv | 10/22/2019 11:25 | Microsoft Excel C | 15 KB |
| 🖳 Project.csv | 10/22/2019 11:25 | Microsoft Excel C | 1 KB |
| 🖳 ProjectCoC.csv | 10/22/2019 11:25 | Microsoft Excel C | 1 KB |
| Services.csv | 10/22/2019 11:25 | Microsoft Excel C | 2 KB |

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 the bring up the locked file

| 🚺 Downloads |) HMIS RHY CSV 2020 Export_20200110231 | 1/28/2020 4:41 PM | Application | 1,850 KB |
|------------------------------------------------|------------------------------------------|--------------------|---------------------|-----------------------------------------------------------------------------------|
| Recent Places |) HMIS RHY CSV 2020 Export_20200110231 | 1/28/2020 4:42 PM | Application | 1,850 KB |
| |) HMIS RHY CSV 2020 Export_20200110231 | 1/28/2020 4:42 PM | Application | 1,850 KB |
| Libraries |) HMIS RHY CSV 2020 Export_20200110231 | 1/28/2020 4:43 PM | Application | 1,850 KB |
| Documents |) HMIS RHY CSV 2020 Export_20200110231 | 1/28/2020 4:43 PM | Application | 1,850 KB |
| J Music |) HMIS RHY CSV 2020 Export_20200110231 | 1/28/2020 4:44 PM | Application | 1,850 KB |
| Fictures |) HMIS RHY CSV 2020 Export_20200110231 | 1/28/2020 4:46 PM | Application | 1,850 KB |
| Videos |) HMIS RHY CSV 2020 Export_20200110231 | 1/28/2020 4:47 PM | Application | 1,850 KB |
| - |) HMIS RHY CSV 2020 Export_20200110231 | 1/28/2020 4:48 PM | Application | 1,850 KB |
| Computer |) HMIS RHY CSV 2020 Export_20200110.221 | 1/20/2020 4-52 014 | Application | 1 950 / P |
| Kindows (C:) | AMIS RHY CSV 2020 Export_2020011 | n Use | | |
| DVD Drive (D:) HP DJ1010 |) HMIS RHY CSV 2020 Export_2020011 | The action can't | e completed becau | ise the file is open in Run this program t |
| arra tracking (\\comfilesrv1\shared) (J:) |) HMIS RHY CSV 2020 Export_2020011 | | crypted in ClientTr | |
| ifp administration (\\comfilesrv1\shared) (R:) |) HMIS RHY CSV 2020 Export_2020011 | Close the file and | to/ again | |
| planning (\\comfilesrv1\shared\cdd) (S:) | i HMIS SSO Extract November 2019.zi | crose the nie and | | |
| g apps (\\comfilesrv1\vol_apps) (V:) | HMIS SSO Validation November 201 | 1 | | SV 2020 Export_20200110231607 (47).e ion: Run this program to extract the file |
| Toolbox (\\comfilesrv1\SHARED) (W:) | HMIS SSO Validation September.zip | 10/ | | ClientTrack. |
| - |) HMIS SSVF CSV 6.1 Export_20190829 | | File version: | |
| Network |) HMIS SSVF CSV 6.1 Export_20190829 | | Size: 1.80 M | I: 1/29/2020 10:11 AM B |
| |) HMIS SSVF CSV 6.1 Export_20190829 | | 5 | |
| | AMIS SSVF CSV 6.1 Export_20190829 | | | |
| |) HMIS SSVF CSV 6.1 Export_20190903 | | | Try Again Cancel |
| |) HMIS SSVF CSV 6.1 Export_20190903 | | | iny Again Cancer |
| |) HMIS SSVF CSV 6.1 Export_2019090320-00 | 9/5/2019 2:40 PW | incation | 1,009 KB |
| |) HMIS SSVF CSV 6.1 Export_201909032056 | 9/3/2019 2:35 PM | lication | 1,869 KB |
| |) HMIS SSVF CSV 6.1 Export_201909032157 | 9/3/2019 4:24 PM | lication | 1,841 KB |
| |) HMIS SSVF CSV 6.1 Export_201909032157 | 9/3/2019 3:13 PM | lication | 1,841 KB |
| |) HMIS SSVF CSV 6.1 Export_201909051936 | 9/5/2019 12:44 PM | lication | 1,869 KB |
| |) HMIS SSVF CSV 6.1 Export_201909052118 | 9/5/2019 2:20 PM | lication | 1,869 KB |
| | HMIS SSVF CSV 6.1 Export_201909302248 | 9/30/2019 4:06 PM | lication | 1,872 KB |
| | HMIS SSVF CSV 6.1 Export_201910011557 | 10/1/2019 9:28 AM | lication | 1,842 KB |
| | HMIS SSVF CSV 2020 Export_20191002224 | 10/2/2019 3:46 PM | lication | 1,843 KB |
| | HMIS SSVF CSV 2020 Export_20191031215 | 10/31/2019 4:01 PM | lication | 1,832 KB |
| | HMIS SSVF CSV 2020 Export_20191031215 | | lication | 1,832 KB |
| | HMIS SSVF CSV 2020 Export_20191031234 | 11/1/2019 8:44 AM | lication | 1,846 KB |
| | HMIS SSVF CSV 2020 Export_20191031234 | | lication | 1,875 KB |
| | HMIS SSVF CSV 2020 Export_20191101203 | | lication | 1,832 KB |
| | | | lication | 1,832 KB |
| HMIS RHY CSV 2020 Export_2020011023 Date mi | AMIS SSVF CSV 2020 Export_20191101203 | | | |

Once the Extract Encrypted Files screen is shoing click on Quit

| % | | | |
|---------------------------------|--|---|--|
| ClientTrack- | | | |
| | | | |
| | | | |
| Finished extracting 15 entries. | | | |
| | | | |
| File 15 of 15 | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | / | |

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 permantly delete all files?"

| parate. | Delete Multiple Items |
|---------|-----------------------------------------------------------------|
| parate | Are you sure you want to permanently delete all of these items? |
| parate | X a Microsoft Excel Comma Separate |

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

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

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

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 Dateas 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.

| 🗲 🛨 🖪 HMIS SSVF Export - CSV 6.1 | 🚍 🛈 🚍 🖬 |
|-------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | |
| | something creative • |
| Source Type - Identify where the export is being generated from. This populates fields in the Export.csv. | |
| Source Type:* | Agency-Specific Database 🔻 |
| Date Range - Indicate the time period for this export. Only e rollments that were active at some point wi be used for the Export Start Date. | thin the date range you select will be included However, all data associated with those enrollments, up to the end date will be included. The start date of the SSVF grant (or earlier) should |
| Predefined Date Range: | - SELECT |
| Enrollments active between: | 10/01/2019 🕮 and 01/29/2020 🕮 |
| Export Date: | 01/29/2020 🗐 03:28 🙀 |
| Organization(s) - Indicate which organizations should be included in the report by selecting each organi | ization separately, or click the 🖋 icon to select all. Note: The list only shows organizations you are authorized to view. |
| Organization(s).* | Aspiranet BIRRS (Stanislaus County Behavioral Health & Recovery Services) CARE of Stanislaus County Catholic Charities Diocese of Stockton Center For Human Services Children's Crisis Center |
| Program(s) - Check the box to limit report results by selected programs. When checked, the list displays select all. | s 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 |
| Program(s): | # Filter by Program(s) # CDD SSVF IMA HP # CDD SSVF IMA RH # CDD SSVF RAH # CDD SSVF RAH # CDD SSVF SSJ RH |
| Grant(s) - Check the box to limit report results by selected grants. When checked, the list displays grants | Selected: sthet being 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): | <pre># Filter by Grant(s)</pre> ✓ CCD SSVF |
| | |
| Seclude Deleted Records: | 8 |
| | 😭 Run Export 🗙 Cancel |
| Then select Run Export | ort |

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

| - Identify where the export is being generated from. This populates fields in the | Export.csv. It is not a CoC Filter. | | | | |
|---------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|---------------------------------|--------------------------------------------------------------------|-------------------------------|-----------------------------------------------------|
| Sou | rce Type:* Agency-Specific Databa | ase 🔻 | | | |
| Indicate the time period for this export. Only enrollments that were active at so he Export Start Date. | ome point within the date range you selec | ct will be included.However, al | II data associated with those en | rollments, up to the end date | will be included. The start date of the SSVF gran |
| Predefined Di | xport Encryption | | | × | |
| Enrollments active E> | If you encrypt the export, the generated that can only be decrypted using the pa the password you provide must be at le | assword you provide. Strong p | ncrypted using 256 bit AES encr basswords are not enforced here | ryption e, but | |
| (s) - Indicate which organizations should be included in the report by selectin | If you choose to not to encrypt your explain text. All appropriate cautions sho | port, the file exported may con | ntain person identifying informa | tion in thorized to view. | |
| Organ | Indicate if the exported file(s) should in each of the values in the CSV file repre- quotes. | | | | |
| | Encrypt Export: | 2 | | | |
| | Password:* | | | | |
| - Check the box to limit report results by selected programs. When checked, th | Confirm Password:* | | | included in the rep | port by selecting each program separately, or click |
| P | Include Header Row in CSV File(s): | 2 | | | |
| | Always Quote CSV Values(s): | | | | |
| | | | | | |
| | | | | \frown | |
| | | | (| | |
| teck the box to limit report results by selected grants. When checked, the list \mathfrak{q} | | | | Done at e report by select | ing each grant separately, or click the 🥩 icon to s |
| | Grant(s): ♥ Filter by Grant(s) ♥ CCD SSVF | | | | |
| | | | | | |

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

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

| net/15/MainPage.aspx?Inline=false | | |
|-------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| Reports to All Search Q | usw.clienttrack.net says | |
| | Your export has been queued and will be processed at the next available time. | |
| SSVF Export - CSV 6.1 | OK | |
| he HMIS CSV 6.1 Standard the data included will fit the filters that a | | |
| | | |
| Source | End Point:* something creative • | |
| here the export is being generated from. This populates fields in th | e Export.csv. It is not a CoC Filter. | |
| So | urce Type:* Agency-Specific Database 🔹 | |
| e time period for this export. Only enrollments that were active at a t Date. | ence point within the data can a worke alect will be included it a worke officiate constant d with the can evaluate Export Encryption | x to the end date w |
| Predefined D Enrollments activ | If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide must be at least 6 characters long. | n t |
| E | If you choose to not to encrypt your export, the file exported may contain person identifying information plain text. All appropriate cautions should be exercised to ensure the protection of this information. | in |
| te which organizations should be included in the report by selectin Organ | indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should always be enclosed in double quotes. | thorized to view. |
| | Encrypt Export: 🖉 | |
| | Password:* | |
| | Confirm Password:* | |
| box to limit report results by selected programs. When checked, th | Include Header Row in CSV File(s): | included in the repor |
| P | Always Quote CSV Values(s): | |
| | | |
| | | |
| | D | one |
| | | |

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

| app.clienttrack.net says: | × |
|-------------------------------------------|----|
| The password and confirmation must match. | |
| | ОК |



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



The report status will be visible.

| Creator | Crea | ted | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|----------------------------------|----------|
| Task List | | | × |
| Asynchronous Tasks | | 📰 🕕 👔 🛤 | |
| Below is a listing of tasks that are either queued to be detail, click the view details folder to the left of the task click view log. It's important to note that it a task begin Show only my tasks: | k. To view a log of the task execution, upon t is its execution at the next available time base | ask processing, completion or er | |
| | Displaying 1-200 of 1,232 results. Next | Last | |
| Task Name 🔺 | Desired Start Time + End Time + | Status 🔺 | TaskID 😎 |
| Run CSV Export - HMIS SSVF CSV 6.1 Export | 01/29/2020 3:40PM 01/29/2020 3: | 45PM Completed Successfully | 75798 |
| Cache Cleanup | 01/20/2020 5:00AM 01/29/2020 5 | OSAM Completed Successfully | 75797 |
| End Expired Enrollment Accounts | 01/29/2020 4:00AM 01/29/2020 4: | 05AM Completed Successfully | 75796 |
| Missing ServiceFamilyInfo | 01/29/2020 2:00AM 01/29/2020 2: | 11AM Completed Successfully | 75795 |
| O Check For Case Manager Assignments | 01/29/2020 2:00AM 01/29/2020 2: | 05AM Completed Successfully | 75794 |
| 🚺 LSA Staging Data Clean-up | 01/29/2020 1:00AM 01/29/2020 1: | 07AM Completed Successfully | 75793 |
| AutoRun_Service CheckIn Month | 01/29/2020 1:00AM 01/29/2020 1: | 17AM Completed Successfully | 75792 |
| EDI Remove Past Staging Records | 01/29/2020 1:00AM 01/29/2020 1: | 07AM Completed Successfully | 75791 |
| Remove Old WorkFlowInstances | 01/29/2020 1:00AM 01/29/2020 1: | 06AM Completed Successfully | 75790 |
| Auto Disable User | 01/29/2020 1:00AM 01/29/2020 1: | 05AM Completed Successfully | 75789 |
| Auto closo Poferral | 01/20/2020 1-00AM 01/20/2020 1- | 17AM Completed Successfully | 75700 |

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.

| ≡ | | Reports \$ | All Search | Q | | |
|---|-------------------------------------------------------|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ? | | | | | | |
| | Files on Server | | | | | |
| | Displayed below is a lis will no longer be availab | t of the files avai ble for download | iable for you to downlo by any user or be avail | ad. Files may be available for a able for processing if used in an | imited time they expire, and will be import once deleted. | e automatically removed, on the date specified |
| | Click to view the status | of export or imp | ort tasks. | | | |
| | | | ct Encrypted File(s) | | | × |
| | r 🔁 | | ClientTra | | | |
| | | | r the password to | extract the file(s) | | |
| | | | ••••• | | ying information. Once the file(s) h | |
| | | th co th re th ap | ey may contain persona ontinued protection of th le information contained sponsibility of ensuring is data once it is no long oplicable local, state, and | Ily identifying information in plain is information. Data Systems Inte I within the file(s). By checking thi the security of the file(s) and any i yer needed. Users of this extraction | text. All appropriate cautions shoul mational (DSI) is not responsible following box, you acknowledge th following box, you acknowledge th data contained within, including the tool should consult their employer ttion of personally identifying inforr | Id be exercised to ensure the the protection, use, or misuse of nat you will assume the full responsibility of properly deleting 's policies, procedures, and |
| | | Ente | r or select the dire | ctory to extract to | | |
| | | C | \Users\pestrada\Dow | nloads | | |
| | | V | View files after extra | acting | | |
| | | If | the file(s) already exis | t Overwrite silently | | <u> </u> |
| | | | | | Show Contents | Extract Cancel |
| | | | | | | |

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

| click to view the status | of export or import tasks. | |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| | HM ClientTrack™ | |
| | Enter the password to extract the file(s) | Browse For Folder |
| | ••••••• These files have been encrypted to protect personally identifying inform they may contain personally identifying information in plain text. All app | ropi |
| | continued protection of this information. Data Systems International (DS the information contained within the file(s). By checking the following b responsibility of ensuring the security of the file(s) and any data contain this data once it is no longer needed. Users of this extraction tool should applicable local, state, and federal laws governing the protection of perso | ox,) ed w A B Patty Estrada |
| | ☑ I assume responsibility for the security of the extracted file(| s) ata standards |
| | Enter or select the directory to extract to | Desktop |
| | C:\Users\pestrada\Downloads | SSVF CCD |
| | View files after extracting | |
| | If the file(s) already exist Dverwrite silently - | Folder: C: Users bestrada Downloads Wew Folder (73) Pake New Folder OK Cancer |

This screen will appear, click Extract



The files will be extracted

| | https://usw | sw.clienttrack.net/15/MainPage.aspx?Inline=false | |
|---------|---------------------------------------------------------|--------------------------------------------------|-----------|
| ≡ | Clie | entTrack [™] Reports \$ All Search Q | |
| ? | |) Extract Encrypted File(s) | 1 |
| | Files on S Displaye will no lo <u>Click to</u> | ve ClientTrack | oved, i |
| | | | Cre Pa |
| | - I | Finished extracting 13 entries. | |
| | | | |
| | | File 13 of 13 | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | Show Contents Extracted. Quit | |
| | | | |

Once extracted, the 13 files will appear

| ile Edit View Tools Help | | | | |
|----------------------------------------|-------------------------|-------------------|-------------------|-------|
| rganize 🔻 Include in library 🔻 Share w | ith 🔻 New folder | | | |
| F avorites | Name | Date modified | Туре | Size |
| 💻 Desktop | Client.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 11 KB |
| 🐌 Downloads | 🖳 Disabilities.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 1 KB |
| 📃 Recent Places | 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 |
| 🗃 Libraries | EnrollmentCoC.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 6 KB |
| Documents | 🖳 Exit.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 4 KB |
| J Music | Export.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 1 KB |
| E Pictures | 🖳 Funder.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 1 KB |
| H Videos | 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 |
| Computer | Project.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 2 KB |
| 🚢 Windows (C:) | ProjectCoC.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 2 KB |
| DVD Drive (D:) HP DJ1010 | Services.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 12 KB |

| Name | Date modified | Туре | 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 | Туре | 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 KE |
| 🖺 EnrollmentCoC.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 6 KE |
| 🔊 Exit.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 4 KE |
| 🖳 Export.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 1 KE |
| 🔊 Funder.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 1 KE |
| 🖺 HealthAndDV.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 7 KE |
| 🖳 IncomeBenefits.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 26 KE |
| 🖳 Project.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 2 KE |
| 🖺 ProjectCoC.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 2 KE |
| 🖳 Services.csv | 1/29/2020 1:45 PM | Microsoft Excel C | 12 KE |

| lame | | | Date modified | Туре | Size |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|-------|
| 🔄 Client.csv | | | 1/29/2020 1:45 PM | Microsoft Excel C | 11 KB |
| 🖺 Disabilitie | s.csv | | 1/29/2020 1:45 PM | Microsoft Excel C | 1 KB |
| 🖺 Employm | entEducation.csv | | 1/29/2020 1:45 PM | Microsoft Excel C | 9 KB |
| 🖺 Enrollmer | it.csv | | 1/29/2020 1:45 PM | Microsoft Excel C | 14 KB |
| 🐴 Enrollmer | 1tCoC.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.cs | v | | 1/29/2020 1:45 PM | Microsoft Excel C | 1 KB |
| 🐴 HealthAn | dDV.csv | | 1/29/2020 1:45 PM | Microsoft Excel C | 7 KB |
| 🖺 IncomeBe | enefits.csv | | 1/29/2020 1:45 PM | Microsoft Excel C | 26 KB |
| 🖺 Project.cs | v | | 1/29/2020 1:45 PM | Microsoft Excel C | 2 KB |
| 🐴 ProjectCo | C.csv | | 1/29/2020 1:45 PM | Microsoft Excel C | 2 KB |
| 🔄 Services.c | sv | | 1/29/2020 1:45 PM | Microsoft Excel C | 12 KB |
| | Open Print Edit 7-Zip | • | | | |
| | Print Edit | > + + | | | |
| Ē | Print Edit 7-Zip CRC SHA Share with | , , , | Compressed (zipped) fo | older | |
| Ĕ | Print Edit 7-Zip CRC SHA Share with Scan for threats Send to Cut | | Compressed (zipped) fo Desktop (create shortcu Documents | | |
| Ĕ | Print Edit 7-Zip CRC SHA Share with Scan for threats Send to Cut Copy | | Desktop (create shortcu Documents | | |
| IJ | Print Edit 7-Zip CRC SHA Share with Scan for threats Send to Cut Copy Create shortcut | | Desktop (create shortcu Documents Fax recipient | | |
| Ð | Print Edit 7-Zip CRC SHA Share with Scan for threats Send to Cut Copy Create shortcut Delete | | Desktop (create shortcu Documents Fax recipient Mail recipient | it) | |
| | Print Edit 7-Zip CRC SHA Share with Scan for threats Send to Cut Copy Create shortcut | | Desktop (create short co Documents Fax recipient Mail recipient arra tracking (\\comfile | it) :srv1\shared) (J:) | |
| | Print Edit 7-Zip CRC SHA Share with Scan for threats Send to Cut Copy Create shortcut Delete | | Desktop (create shortcu Documents Fax recipient Mail recipient arra tracking (\comfile ifp administration (\co | it) srv1\shared) (J:) omfilesrv1\shared) (R:) | |
| | Print Edit 7-Zip CRC SHA Share with Scan for threats Send to Cut Copy Create shortcut Delete Rename | | Desktop (create shortco Documents Fax recipient Mail recipient arra tracking (\comfile ifp administration (\co planning (\comfilesrv1 | it) srv1\shared) (J;) omfilesrv1\shared) (R:) L\shared\cdd) (S;) | |

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

| Name | Date modified | Open Open in new window |
|----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|---------------------------------------------------------|
| 国 Client.csv ᆁ Disabilities.csv ᆁ EmploymentEducation.csv | 1/29/2020 1:45 PM 1/29/2020 1:45 PM 1/29/2020 1:45 PM | Extract All 7-Zip > CRC SHA > Scan for threats |
| 圖 Enrollment.csv ᆁ EnrollmentCoC.csv வ Exit.csv | 1/29/2020 1:45 PM 1/29/2020 1:45 PM 1/29/2020 1:45 PM | Open with Share with Restore previous versions |
| 직 Export.csv 의 Funder.csv 의 HealthAndDV.csv | 1/29/2020 1:45 PM 1/29/2020 1:45 PM 1/29/2020 1:45 PM | Send to Cut |
| IncomeBenefits.csv Project.csv ProjectCoC.csv Convices cm | 1/29/2020 1:45 PM 1/29/2020 1:45 PM 1/29/2020 1:45 PM 1/29/2020 1:45 PM | Copy Create shortcut Delete |
| Services.csv | 1/29/2020 1:45 PM 1/30/2020 10:05 AM | Properties Properties |

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

| Name | Date modified | Туре | Size |
|--------------------------|--------------------|-------------------|----------------------|
| 引 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 | You can then open |
| EnrollmentCoC.csv | 1/29/2020 1:45 PM | Microsoft Excel C | and review files for |
| 🖳 Exit.csv | 1/29/2020 1:45 PM | Microsoft Excel C | |
| 🖳 Export.csv | 1/29/2020 1:45 PM | Microsoft Excel C | errors |
| 🔊 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 |

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

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

| ome | Veteran Services | Business | About VA | Media Room | Locations | Contact Us |
|------------------------------------------------------------------------------------------------------------------|--------------------------------------|----------------------------------------------------------|----------------------------------------------------------|----------------------------------------------------------------------------------|----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| | the Vete | W an Statu | elcome to s Query a | o the HMIS and Respon | Reposito se Exchan | ry and Ige System (SQUARES) |
| | The Repo | sitory is a secu | re web-based a | pplication. Its prim | ary functions ar | e to: |
| | Ver Cor End | ify that the up nbine the data | oaded data set sets from all S s to search VA i | from HMIS and up s meet VA data up SVF grantees into records by name, S | load and integra a single databas | tion specifications |
| | V | terans Statu | s Query and R | esponse Exchance Conditions of I | | UARES) - Terms and |
| | the Ui inform not co the in | nited States (U nation (PII) to t Intain PII about | S.) military thr the VA Departm t the client. To r | rough a real time q tent of Defense Ide use the site, you w | uery of a client's entity Repository fill provide the fo | ents who have served in personal identifying (VADIR). The result will blowing information on out: Note: " denotes a |
| | | First Name Middle Name | | | | |
| | | Last Name * Social Security | Number * | | | |
| | | Date of Birth * Gender | | | | |
| | | - C | st permanent a | | | |
| VA will use the information you provide to identify individuals for whom it has a record of military service. | | | | | | |
| | VA m | akes the follow | ng assurances | about its use and I | nandling of such | data: |
| | 1. | | | | | VRSS in accordance with edures and National |
| | | (| I have read | and accept the Ter | ms and Conditio | ins of Use |
| | | | | | | |
| | | Use | rname | | | |
| | | Dag | sword | | | |

| 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. §§ 5541-49), 38 U.S.C. § 5701, and VA Directive and Handbook 6500. 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. 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. 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. 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. 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 SOUARES application in accordance with NARA approved records control schedules |
| I have read and accept the Terms and Conditions of Use Username Password |
| - dasword |
| |
| |
| Login |
| |
| Register a new SQUARES account Register a new Repository account I forgot my password |
| |
| |
| CO TENES |



HMIS Repository / SQUARES Account Menu

| User Options | Important Upload Information |
|---------------------------------------------|----------------------------------------------------------------------------------------------|
| | The deadline for an on-time upload is the THIRD BUSINESS DAY |
| <u>SQUARES</u> | of each month. |
| <u>My Account</u> | The Repository will remain open through the NINTH calendar |
| <u>Activity History</u> | day of each month for updates and additions. |
| <u>Support</u> | DATA QUALITY REPORTING is currently unavailable. We |
| Logout | 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 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 these files |

- O mes i proceedings and the location of the location of the safe of the repository with 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 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:





me Veteran Services Business About VA Media Room Locations Contact Us

Activity History

Repository Home

| Select program: | Catholic | Charities | of the | Diocese | of Stockton | (14-CA-177) T |] |
|-----------------|----------|-----------|--------|---------|-------------|---------------|---|
|-----------------|----------|-----------|--------|---------|-------------|---------------|---|

| 3/7/16 4:46:40 PM Ifullerm (Catholic Charities of the Diocese of Stockton (14-CA-177)) 3/7/16 4:46:14 PM (Catholic Charities of the Diocese of Stockton (14-CA-177)) | Upload successful Validation successful |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|
| 3/7/16 4:46:14 PM | Validation successful |
| | |
| 3/1/16 8:24:10 PM (Catholic Charities of the Diocese of Stockton (14-CA-177)) | Upload successful |
| 3/1/16 8:23:39 PM Ifullerm (Catholic Charities of the Diocese of Stockton (14-CA-177)) | Validation successful |



HMIS Repository Account Menu

User Options

- Upload FY15 Data
- <u>Upload CSV</u>
 <u>Upload XML</u>
- My Account
- <u>Activity History</u>
- <u>Support</u>
- 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 <u>ssvfhmis@abtassoc.com</u> 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 <u>ssyfhmis@abtassoc.com</u> 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

| 1. Program: ZZ Test F | Program [Complete] | | • |
|--------------------------|------------------------------------------|------------|---|
| 2. Zip file: Choose | File No file chosen | (zip file) | |
| 3. Options: | l ate and upload late Oply | | |

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

| | | Upload CSV F | | | |
|-----------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|-------------------------|-----------------|----------------|----------|
| | <u></u> | C Doniau Prita Cata () | repository Hori | | |
| | | | | | |
| | Step 1. File Upload | | | | |
| | Program.name: Catholic Charities of the Dioc | ese of Stocktob (14-C) | A-177) | | |
| | User name: Ifuilerm | ese or stockton (14-O | | | |
| | User email: ifuller@stancoha.org File name: CCDMarch1.2016.zip | | | | |
| | File type: application/x-zip-compressed | | | | |
| | File size: 78.2333984375 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.] | | | 5 T | |
| de la contra de la c | Enrollment.csv [332 rows found in the file.] | 1 | | and the second | · · · ·· |
| | EnrollmentCoC.csv [263 rows found in the Client.csv [321 rows found in the file.] | file.] | | | |
| | Exit.csv [296 rows found in the file.] | | | | |
| | IncomeBenefits.csv [753 rows found in the feedback [650 rows found in the file.] | e file.] | | | |
| | | 1 | | · · · | |
| | [Validation Result Summary] | | | | |
| | Data Quality Alerts | | | | |
| | | | | | |
| | No issue found. | | | | |
| | Validation Errors | | | | |
| | No issue found. | | | | |
| | File Errors | | | | |
| | | | | | |
| | No issue found. | | | | |
| | | | | | |

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: Cilent.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 [246 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 | | | | | |
| | , zip with file ki ID 39023 has been inserted successfully to the database. as been updated as completed. | | | | |
| [Data Summary] | | | | | |
| Grant year start date | : 2015-10-01 | | | | |
| Grant year end date | : 2016-09-29 | | | | |
| Participants served | : 111 - | | | | |
| 88H participants served | 1:107 | | | | |
| HP participants served | : 4 | | | | |
| Veterans served | : 67 | | | | |

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



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

| #4. Run Export | | e 🔒 f |
|---------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| COV ALIX 112020 | | |
| e Range - Indicate the time period for his report. Only records that fa | within the date range you selec | t will be included. |
| | Date Range List: | - SELECT - T |
| | Begin Date: | 10/01/2019 🖻 to 01/30/2020 🗰 |
| anization - Indicate which organizations should be included in the re- | ort by selecting each organizati | on separately, or click the 🥡 icon to select all. Note: The list only shows organizations you are authorized to view. Only enrollments created by the Organizations selected here will be |
| #1 | Organization:* | Aspiranet BHRS (Stanislaus County Behavioral Health & Recovery Services) CARE of Stanislaus County Catholic Charties Diocese of Stockton Center For Human Services Children's Crisis Center |
| nt Program - Use the Grant Program and Grant Component drop dow | n selections to narrow down the | list of Grants #2 |
| | | VA: Supportive Services for Veteran Families Homeless Prevention OR Rapid Rehousing |
| nt(s) - This list displays grants that belong to the organizations you s | elected above. Indicate which gr | ants should be included in the report by selecting each grant separately, or click the 🌮 icon to select all. Use the Grants filter to narrow down the list of projects for your report. |
| | Grant(s): | <pre>% Filter by Grant(s)</pre> |
| ogram - A list of programs based on the grant selected. | | |
| | r regrant ryper | ■ Filter by Program Type 2 Filter by Program > CCD SSVF HP > CCD SSVF HP > CCD SSVF RMA PH > CCD SSVF RMA PH > CCD SSVF RMA PH > CCD SSVF RMH > CCD SSVF SSJ HP > CCD SSVF SSJ HP > CCD SSVF SSJ HP > CCD SSVF SSJ HP |
| lidation File - Checking this box will generate a separate task to gener | ate a validation file once the file | export task has completed. This will not affect the running of or delay the main export. |
| · · · · · · · · · · · · · · · · · · · | Generate Validation File: | |
| | series and a series of the ser | Run Export 🔀 Canc |

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.

| _ | × | HMIS APR_CAPER 2020 Validation_20191022192703.exe 👔 |
|----------|---|-----------------------------------------------------|
| _ | × | HMIS APR 2020 Export_20191022192642.exe 🕢 |
| <u>_</u> | × | HMIS APR_CAPER 2020 Pre-Load_20191022191537.exe 👔 |

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 Gloassary, 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.

| The exact will not unit obtained on the combination of all parameters you set. For each | rple, if you shoose Departurbions "Agency 1" and "Agency 2" and Project. PDA 123" the report will only include | clears evolved in PSH 123 by Agency 3 or Agency 2 |
|--------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| Date Range - indicate the time period for his report, Only records that fall within the date re | ge you select will be included | |
| | terge List - SELECT - • regin Date: 07/01/2019 전 16 01/09/2020 전 | |
| Organization - Industry which organizations should be included in the report by selecting of | Export Encryption | rand to view. Only enablements created by the Organizations selected here will be |
| included in the export. | If you encrypt the export, the generated exports will be zapped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least II characteris long. If you choose to the encryption that are at the experted may contain person identifying information in | |
| | in for boote or our bracking for a highly take the encoded to encode the state of the state o | |
| Grant Program - Use The Grant Program and Grant Component drop down selections to no Grant | quotes. Encrypt Export: 10 | |
| Gant C | Password.* | |
| ${\sf Gravef}({\bf x})$. This list displays gravits that belong to the organizations you selected above. In | Include Header Row in CSV File(s): | t at: Use the Grants filter to narrow down the list of projects for your report. |
| | Always Quote CSV Values(s): | |
| | | |
| Program - A list of programs based on the grant selected. | Dow | |
| | pun Type C Filter by Program Type Program + # Filter by Program # Creds Erse SHELTER | |
| | e and the file export task has completed. This will not affect the numming of or delay the mein export. | |
| | | Thurbor X Grod |

Export Encryption If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long. If you choose to not to encrypt your export the file exported may contain person identifying information in

If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information. Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what

| Encrypt Export: | v | |
|----------------------------------------|----------|---|
| Password:* | | |
| Confirm Password:* | |) |
| nclude Header Row in CSV File(s): | 4 | |
| lways Quote CSV Values (s); | | |
| | | |
| | | |
| | | |

| https://usw.cientu.ack.net/15/iviainrage.aspxtmi | 116-10126 | | | | |
|-----------------------------------------------------------------------------------------------------------|--------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|---------------------|
| ClientTrack [™] Reports 7 All | Search | usw.clienttrack.net say Your export has been que available time. | ys eued and will be processed at the new | xt | |
| Rease note that multiple project and program type su necessary for compliance. | pport is only intended for cases where m | | | ок at enter data into | o multiple projects |
| The export will return data based on the combina Date Range - Indicate the time period for his report. | | | ty 1" and "Agency 2" and Project "PSH | 123° the report will only inclu | de clients enrolle |
| Date Range - indicate the time period for his report. | | Range List: - SELECT - legin Date: 07/01/2019 - 01/ | v (09/2020 | | |
| Organization - Indicate which organizations should b included in the export. | e included in the report by selecting o | Export Encryption If you encrypt the export, the generate that can only be decrypted using the p the password you provide must be at if you choose to not to encrypt your ex- plain text. All appropriate cautions shi- indicate if the exported file(s) should in each of the values in the CSV file repre- | assword you provide. Strong password least 8 characters long. cport, the file exported may contain per build be exercised to ensure the protect include a header line at the beginning c | ds are not enforced here, but rson identifying information in tion of this information. of the file that indicates what | |
| Grant Program - Use the Grant Program and Grant C | omponent drop down selections to na Gran Grant C | quotes. Encrypt Export: Password:* Confirm Password:* | | | |
| Grant(s) - This list displays grants that belong to the | organizations you selected above. Inc | Include Header Row in CSV File(s): Always Quote CSV Values(s): | 2 | | st all. Use th |
| Program - A list of programs based on the grant sele | cted. Pro | | | Dor | 18 |
| | | | | | |

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.

| app.clienttrack.net says: | × |
|-----------------------------------------------------------------------|-----------|
| The password and confirmation must match. | |
| | ок |
| app.clienttrack.net says: | × |
| Your export has been queued and will be processed at the next a time. | available |
| | ок |

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

| ê 1 | ttps://usw.clienttrack.net/15/MainPage.aspx?Inline=false | | | Q, | | |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------|----------------------------------------------|--|--|
| Ξ | ClientTrack ^{**} Reports * All Search Q | | | 🌲 Patty Estrada (Training) Help Sign Out | | |
| ? | | | | | | |
| | Files on Server | | | | | |
| | Displayed before 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 set and concerning the available for you to download, Files may be available for a limited time they expire, and will be automatically removed, on the date specified. | | | | | |
| | Click to view the status of export or import tasks. | | | | | |
| | File-Name | Creator | Created | Expires | | |

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

| File Name | Creator | | Created | Exp | vires |
|------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|-------------------------------------------|------------------|
| | Task List | | | | × |
| | Asynchronous Tasks | | | 🚍 🕞 👔 🖼 🚔 | 5 |
| | Below is a listing of tasks that are either o | ueued to be completed or that have been o w a log of the task execution, upon task pr able time based on overall system load. | ompleted in the last 40 Days. To ocessing, completion or error, cli | view the full task detail, click the view | |
| | Show or | nly my tasks: 🔍 | | | |
| | Refreshing in 19 seconds 🕕 | S Refresh Now | | | |
| | | Displaying 1-200 | of 601 results. Next Last | | |
| | Task Name 🔺 | Desired Start T | | Status 🔺 🛛 Task | |
| | HMIS APR/CAPER 2020 Validation | 01/09/2020 3: | | Not Started 69 | |
| | HMIS APR 2020 Export | 01/09/2020 3: | | Not Started 69 | |
| | Run CSV Export - HMIS APR/CAPER 202 | | | | 837 |
| | Cache Cleanup End Expired Enrollment Accounts | 01/09/2020 5:0 | | | 836 |
| | - | 01/09/2020 4:0 | | | 835 |
| | Missing ServiceFamilyInfo Check For Case Manager Assignments | 01/09/2020 2:0 01/09/2020 2:0 | | | 834 |
| | LSA Staging Data Clean-up | 01/09/2020 1:0 | | | 832 |
| | AutoRun, Service Checkin Month | 01/09/2020 1:0 | | | 832 |
| | EDI Remove Past Staging Records | 01/09/2020 1:0 | | | 830 |
| | Remove Old WorkFlowInstances | 01/09/2020 1:0 | 0AM 01/09/2020 1:07AM | Completed Successfully 69 | 829 |
| | Auto Disable User | 01/09/2020 1:0 | 0AM 01/09/2020 1:06AM | Completed Successfully 69 | 828 |
| | Auto-close Referral | 01/09/2020 1:0 | 0AM 01/09/2020 1:17AM | Completed Successfully 69 | 827 |
| | Auto-Post Enrollment Services | 01/09/2020 1:0 | 0AM 01/09/2020 1:16AM | Completed Successfully 69 | 826 |
| | Post housing services | 01/09/2020 1:0 | 0AM 01/09/2020 1:12AM | Completed Successfully 69 | 825 |
| | 2 | | | | |
| | | | | 🗙 Ca | Acel |
| | | | | | |
| | | | | | |
| | | | | | |
| Task List | | | | | |
| Asynchronous Tasks | | | | | 📰 🕢 👔 📲 🚔 |
| elow is a listing of tasks that are e etails folder to the left of the task. Isk begins its execution at the new | . To view a log of the task exec | ution, upon task process | | | |
| Sh | now only my tasks: 🛛 🔲 | | | | |
| freshing in 15 seconds 🕕 | Refresh Now | | | | |
| | | Displaying 1-200 of 601 | results. Next | Last | |
| | | | | | |
| Task Name 🔺 | | Desired Start Time 🔺 | End Time 🔺 | Status 🔺 | Task |
| | n | | End Time 🔺 | | |
| Task Name MHIS APR/CAPER 2020 Validatio | n | Desired Start Time 01/09/2020 3:28PM 01/09/2020 3:28PM | End Time 🔺 | Status Not Started Processing | Task 69 69 |

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

01/09/2020 3:19PM

Run CSV Export - HMIS APR/CAPER 2020 Pre-Load

01/09/2020 3:26PM

Completed Successfully

9837

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

| | ClientTrack" 🗧 📶 Search 🔍 | 🥵 atty Estrada Help S |
|-------------------------|--------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Explorer | | |
| Files on Server | Welcome Patty Estrada | |
| | Community Housing and Shelter Services News | |
| HMIS Active Client List | City of Modesto Stanislaus County | |
| HMIS BNL Veterans | Welcome to ClientTrack | |
| | | |
| | The HMIS System for Stanislaus Community System of Care Collaboration | rative |
| | Administered by the City of Modesto | |
| | Contact Information: HMIS Coordinator: Lynnell Fuller (209) 577-5211, E-mail: Lfuller@m | adectoreu com |
| | Help Information: Use the Help Topics link or contact the HMIS Coordinator. | ddestogov.com |
| | Use the Help Topics link or contact the HMIS Coordinator. | |
| | | |
| | Current Program Enrollments | 150 |
| | | 3.07 |
| | | 100 |
| | Program Cases Clients CHSS BHRS 8 10 | |
| | CHSS CA Stabilization Program RRH 4 16 CHSS Households in Recovery 12 41 CHSS HU0.3 HC 1 2 | 50 |
| | CHSS MOD HP 1 1 CHSS PSH FAM with CHILD #1 3 8 | |
| | CHSS PSH FAM with CHILD #2 5 14 CHSS TANF/Motel Vouchers 37 114 CHSS WHSP 15 61 | dade and and and data to be and and and a start and a |
| | | and the second second second |
| | | and a set and a set and a set and a set |

*Note: Files On Server can aslo 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.

| | × | HMIS APR_CAPER 2020 Validation_20191022192703.exe | | File to verify data errors | |
|----------|------------------|---------------------------------------------------|----|-------------------------------|--|
| _ | $\mathbf{	imes}$ | HMIS APR 2020 Export_20191022192642.exe | | zip and load | |
| _ | × | HMIS APR_CAPER 2020 Pre-Load_20191022191537.exe 👔 | up | load | |

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

| Files on S Displaye will no le | ed below is a lis | st of the files available for you to download. Files may be available for a limited time they expire, and will be automatical bile for download by any user or be available for processing if used in an import once deleted. | ly removed, on the date specified. To do | wnload the file click the download link, to ren | nove the file from file on server click the delete link. The file |
|--------------------------------------|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|-------------------------------------------------|-------------------------------------------------------------------|
| Click to | view the statu | s 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 |
| $\mathbf{}$ | × | 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

| IS IS | La Extract Encrypted File(s) ClientTrack ¹¹ | |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|
| < | Enter the password to extract the file(s) Here files have been encrypted to protect personally identifying information. Once the file(s) have been extracted and decrypted, they may contain personally identifying information in plain test. All appropriate cautions should be exercised to ensure the continued protection of this information. Data Systems International (DSI) is not responsible for the protection, use, or misuse of the information contained within the file(s). By checking the following here uses should be exercised to ensure the full responsible of ensure the security of the file(s) and any data contained within the file(s). By checking the following here uses should be the type will assume the full responsibility of properly detering | |
| < | this data once it is no longer needed. Users of this extraction tool sho applicable local, state, and federal laws governing the protection of p I assume response the formation of additional guidance. Enter or select the directory to extract to C <td></td> | |
| | ☑ View files after extracting If the file(s) already exist Detervente sitently ~ | #3 |
| | Show Contents Extract Cancel | |

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

| ClientTrack™ Enter the password to extract the file(s) | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------|
| ••••• | Browse For Folder |
| These files have been encrypted to protect personally identifying information. O they may contain personally identifying information in plain text. All appropriate continued protection of this information. Data Systems International (DSI) is not the information contained within the file(s). By checking the following box, you responsibility of ensuring the security of the file(s) and any data contained within this data once it is no longer needed. Users of this extraction tool should consult applicable local, state, and federal laws governing the protection of personally ic I assume responsibility for the security of the extracted file(s) Exter or select the directory to extract to C:\Users\pestrada\Downloads\New folder (75) If the file(s) already exist I the file(s) already exist | Select a folder for the extracted files: |
| | Make New Folder OK Cancel |

| ClientTrack | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | |
| Enter the password to extract the file(s) | |
| These files have been encrypted to protect personally identifying i they may contain personally identifying information in plain text. continued protection of this information. Data systems Internation the information contained within the file(s). By checking the follow responsibility of ensuing the security of the file(s) and any data co this data once it is no longer needed. Users of this extraction tool s applicable local, state, and federal laws governing the protection of | All appropriate cautions should be exercised to ensure the nal (DSI) is not responsible for the protection, use, or misuse of wing box, you acknowledge that you will assume the full ontained within, including the responsibility of properly deleting should consult their employer's policies, procedures, and |
| I assume responsibility for the security of the extracte | d file(s) |
| Enter or select the directory to extract to | |
| C:\Users\lfuller\Documents\ESG\ESG CAPER TEST | |
| View files after extracting | |
| If the file(s) already exist | Once all is showing correctly, then Extract |
| | Show Contents Extract Cancel |
| | |
| Encrypted File(s) | _ |
| | _ |
| incrypted File(s) ClientTrack™ 11 of 69 | Files being extracted will display |
| ClientTrack™ | |

| Print | New folder | | | |
|-------|-------------|-------------------|-------------------|------|
| | Name | Date modified | Туре | 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 |
| | A 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 Do | Informatio | 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 | |
| Ethnicity (2.05) | 0 | 0 | | 0 | 0 | |

| File Edit View Tools Help | | | | |
|-------------------------------|--------------------------|-------------------|-------------------|--------|
| Organize 👻 🔀 Open 👻 Share wit | h ▼ Print New folder | | | |
| 🔆 Favorites | Name | Date modified | Туре | Size |
| 🧮 Desktop | APR_2020_Detail.csv | 1/30/2020 1:36 PM | Microsoft Excel C | 132 KB |
| 鷆 Downloads | APR_2020_DQ_2_Detail.csv | 1/30/2020 1:36 PM | Microsoft Excel C | 1 KB |
| 🔚 Recent Places | APR_2020_DQ_3_Detail.csv | 1/30/2020 1:36 PM | Microsoft Excel C | 1 KB |
| | APR_2020_DQ_4_Detail.csv | 1/30/2020 1:36 PM | Microsoft Excel C | 1 KB |
| 🗃 Libraries | APR_2020_DQ_5_Detail.csv | 1/30/2020 1:36 PM | Microsoft Excel C | 5 KB |
| Documents | APR_2020_DQ_6_Detail.csv | 1/30/2020 1:36 PM | Microsoft Excel C | 36 KB |
| 🚽 Music | APR_2020_DQ_7_Detail.csv | 1/30/2020 1:36 PM | Microsoft Excel C | 1 KB |
| E Pictures | APR_2020_Q13_Detail.csv | 1/30/2020 1:36 PM | Microsoft Excel C | 44 KB |
| 🛛 📑 Videos | APR_2020_Q14_Detail.csv | 1/30/2020 1:36 PM | Microsoft Excel C | 15 KB |
| | APR_2020_Q19_Detail.csv | 1/30/2020 1:36 PM | Microsoft Excel C | 34 KB |
| 🖳 Computer | APR_2020_Q21_Detail.csv | 1/30/2020 1:36 PM | Microsoft Excel C | 99 KB |

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.

| NameQua | SSN | SSNQualit | Birthdate | BirthDate | Races | HUDEthni |
|---------|-----|-----------|-----------|-----------|-------|----------|
| 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 | You will need to go into HMIS, |
|-------|-------------------------------------|---------------------------------|
| | Full DOB reported | bring up client ID, Edit Client |
| 2 | Approximate or partial DOB reported | and Correct the DOB Quality to |
| 8 | Client doesn't know | Full DOB |
| 9 | Client refused | |
| 99 | Data not collected | |

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

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.

| ile Edit View Tools Help | | | | | - | |
|---------------------------------------------------------|------------|------------------|------------------|--------------------------|----------|--|
| Organize 🔻 🛣 Open 🛛 Burn New folder | | | | | | |
| 🗶 Favorites | Name | ^ | Date modified | Туре | Size | |
| 📃 Desktop | Q25f.csv | | 10/22/2019 12:26 | Microsoft Excel C | 1 KB | |
| 🗼 Downloads | Q25g.csv | | 10/22/2019 12:26 | Microsoft Excel C | 1 KB | |
| 🕮 Recent Places | Q25h.csv | | 10/22/2019 12:26 | Microsoft Excel C | 1 KB | |
| | Q25i.csv | | 10/22/2019 12:26 | Microsoft Excel C | 3 KB | |
| a Libraries | Q26a.csv | | 10/22/2019 12:26 | Microsoft Excel C | 1 KB | |
| Documents | Q26b.csv | | 10/22/2019 12:26 | Microsoft Excel C | 1 KB | |
| J Music | Q26c.csv | Scan for threats | 10/22/2019 12:26 | Microsoft Excel C | 1 KB | |
| E Pictures | Q26d.csv | Send to | Compressed (a | rinned) folder | | |
| Videos | Q26e.csv | \frown | Desktop (creat | 11 · · · | | |
| | Q26f.csv | Cut | Documents | e shoreat) | | |
| n Computer | Q26g.csv | Сору | | | | |
| Low Windows (C:) | Q26h.csv | Create shortcut | | | | |
| 🖙 arra tracking (\\comfilesrv1\shared) (J:) | Q27a.csv | Delete | Mail recipient | | | |
| 🖙 ifp financial information (\\comfilesrv1\shared) (Q:) | Q27b.csv | Rename | DVD RW Drive | | | |
| 🖙 ifp administration (\\comfilesrv1\shared) (R:) | Q27c.csv | | | \\comfilesrv1\shared) (J | - | |
| 🖙 csnc (\\comfilesrv1\shared) (S:) | Q27d.csv | Properties | - · | formation (\\comfilesrv | | |
| 🖵 apps (\\comfilesrv1\vol_apps) (V:) | Q27e.csv | | - · · | tion (\\comfilesrv1\shar | ed) (R:) | |
| 🖵 Toolbox (\\comfilesrv1\SHARED) (W:) | Q27f.csv | | | esrv1\shared) (S:) | | |
| | 🖳 Q27g.csv | | apps (\\comfil | esrv1\vol_apps) (V:) | | |
| 📮 Network | 🖳 Q27h.csv | | Toolbox (\\cor | mfilesrv1\SHARED) (W:) | | |
| | Q27i.csv | | 10/22/2019 12:26 | Microsoft Excel C | 2 KB | |

Highlight the zipped folder and right-click to Rename

| E Pictures | 🔵 🔢 Q26c.zip 🔵 | 10/22/2010 12/12 | Compressed (zipp | 25 KB |
|---------------------------------------------------------|----------------------------|---------------------------|-------------------|-------|
| Videos | Q26d.csv | Open | Microsoft Excel C | 1 KB |
| | Q26e.csv | Open in new window | Microsoft Excel C | 1 KB |
| 1 Computer | Q26f.csv | Extract All | Microsoft Excel C | 1 KB |
| 🚢 Windows (C:) | 🐴 Q26g.csv | Scan for threats | Microsoft Excel C | 1 KB |
| 😪 arra tracking (\\comfilesrv1\shared) (J:) | Q26h.csv | | Microsoft Excel C | 1 KB |
| 🖙 ifp financial information (\\comfilesrv1\shared) (Q:) | 🖳 Q27a.csv | Open with | Microsoft Excel C | 1 KB |
| 🖙 ifp administration (\\comfilesrv1\shared) (R:) | 🖳 Q27b.csv | Restore previous versions | Microsoft Excel C | 1 KB |
| 🖙 csnc (\\comfilesrv1\shared) (S:) | 🖳 Q27c.csv | Send to | Microsoft Excel C | 1 KB |
| 🖙 apps (\\comfilesrv1\vol_apps) (V:) | 🖳 Q27d.csv | | Microsoft Excel C | 2 KB |
| 🖙 Toolbox (\\comfilesrv1\SHARED) (W:) | 🖳 Q27e.csv | Cut | Microsoft Excel C | 1 KB |
| | Q27f.csv | Сору | Microsoft Excel C | 3 KB |
| 🗣 Network | 🖳 Q27g.csv | Create shortcut | Microsoft Excel C | 1 KB |
| | 🖳 Q27h.csv | Delete | Microsoft Excel C | 1 KB |
| 026c.zip Date modified: 10/22/ | 2019 12:42 PM Date created | 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



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 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 V

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.

| l'm not a robot | e |
|-----------------|------------------------------|
| | reCAPTCHA Privacy • Terms |

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



NOTE: Testing on ADD on this name DOEP NOT attack the OPV ADD to an ADD 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.



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.



Your data will show to the right of the screen



Pr

Pr

н

M If I Se

ld ho

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

- 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 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 submit an APR, you must login to Sage and attach your CSV-APR on the Submission Launchpad page.



| roject name | SPC 1-4 & | 5. Number of leavers | | | | |
|--------------------------------------------------------------------------------------|---------------|-----------------------------------------------------------------|--|--|--|--|
| Toject name | 6-8 | 6. Number of adult leavers | | | | |
| roject ID | 19668 | Number of adult and head of house leavers | | | | |
| IMIS Project Type | 3 | leavers | | | | |
| 7 77 | | Number of stayers | | | | |
| lethod of tracking ES | | 9. Number of adult stavers | | | | |
| HMIS Project ID = 6 (S Only), is the | | ,, | | | | |
| ervices Only (HMIS Project Type 6) | | 10. Number of veterans | | | | |
| filiated with a residential project? | | 11. Number of chronically homeless pe | | | | |
| dentify the Project ID's of the ousing projects this project is filliated with | | 12. Number of youth under age 25 | | | | |
| | | 13. Number of parenting youth under a with children | | | | |
| NOTE: if your APR was run for mult | iple projects | 14. Number of adult heads of househo | | | | |

together in a single report, only the first 8 rows from Q4a.csv are imported to Sage.

| 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 |
| Heads of households and adult stayers in the project 365 or more days | 2 |

The report will take a few minutes to generate



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

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

- Q04a: Project Identifiers in HMIS 🛛 🚯

| Organization Name Organization ID Project Name Project ID | Make sure all data is correct. Verify the organization name, project name, etc. |
|--------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| 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

🗕 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 | | 0.00 % |
| Ethnicity | 0 | 0 | | 0.00 % |
| Gender | 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

| ₿ Sign in to ClientTrack N | 🖉 🗙 💙 🌒 HMIS-Da | ata-Dictionary 🗙 🗸 🌒 🤇 | CoC APR and ESG CAPE 🗙 🗸 | HMIS-Programming-S | p 🗙 🗸 🌒 HMIS Stand | dard Reporti 🗙 🗸 🌘 HMI | S Standard Reporti | x 🗸 🌄 Sage | × Y 🗾 Sa | ge | × |
|----------------------------|--------------------|--------------------------|---------------------------|----------------------|------------------------------|------------------------|--------------------|----------------|--------------------------|----------|---|
| > C 🔒 Secure | https://demo.sa | agehmis.info/us/report.a | aspx?report=APR%20v5.1 | ¶ms=1510 | | | | | | | |
| Apps 🛷 ADP 🌘 Hou | using and Urban D | () https://www.onecpd.ir | (OneCPD Resource Exc | 🌒 My OneCPD - OneCPT | G3 [™] Front Office | LAMP Consortium : H | AHAR Reports | 🔀 Sage: Log in | ✗ Sign in to ClientTrack |) Client | |
| age HMIS REPORTING | @ RESOURCES | | | | | | | | | | |
| | | | | | | | | | - 11 | | |
| Q04a: Project Identifiers | in HMIS 🗈 | | | | | | | | | | |
| Organization Name | | | Housing Authority She | elter Plus | | | | | | | |
| Organization ID | | | HA2 | | | | | | | | |
| | | | | | | | | | | | |



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

| 🧉 🔟 2018 HUD Data Quality Report | | 🔄 💽 🔒 🚔 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|-------------|
| In the list the next time you access this screen. | | |
| Saved Report Settings: -SELECT - • | | |
| Date Range - Indicate the time period records that fall within the date range you select will be included. | | |
| #1 Date Range Lize Since This Date, Last Year | | |
| Begin Lie: 01/30/2019 🖾 to 01/30/2020 🖾 🖌 | | |
| Organization - Indicate which organizations should be main and the report by selecting each organization separately, or chick the select all. Note: The list only shows organizations you are | authorized to view | |
| | | |
| Organization:* BHRS CARE of Stanislaus County | | |
| Catholic Charities of the Diocese of Stockton Center For Human Services | | |
| Center for industan services Children's Crisis Center | | |
| CICA | - , | |
| Grant(s) - This list displays grants that belong to the organizations you selected above. Indicate which grants chaudibe lacked in the opport by selecting each grant separately, or click the 🛹 icon t | This report gives you two | |
| | different options: A the | |
| Grant(s): Filter by Grant(s) | | |
| Program - A list of programs based o | aggregated data and B the | |
| #2 | detailed report | |
| in the second se | | |
| Program: | | |
| | | |
| B | _ | |
| | | A |
| | | ~ |
| Coc Filter - You may, optionally, identify a single Coc to filter the report results (HMIS implementations with only one Coc on on feed to do so). If specified, this Coc must match either the client's enrollment head of household Coc or (If that is blank) then this location must match one of the Coc locations identified for the associated program | m. | |
| State Filter for CoC: - SELECT - V | | |
| CoC (Optional): - SELECT - | | |
| Detail Export - Click the Run Export button to generate a separate task to generate the Detail Export. | | |
| Indicate the SSN Masking to be used in the Detail Export. | | _ |
| SSN Masking: XXX-XX-0000 V | | |
| Run Export | | |
| | A Report Schedule Rep | ort 🗙 Cance |
| | Schedule Kep | |

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

| ClientTrack [™] Reports \$ All Search # 2005 | HUD Data Quality Report | Þ | Find Next | 4· 🛛 🖶 [| 0 | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|----------------------------------|------------------------|--------------|-----------------|-------------|
| | HUD Data Quality R | eport | | | | |
| E 2018 HUD Data Quality Report | 1/30/2019 to 1/30/2 | 2020 | | | | ClientTrack |
| | Report Criteria | | | | | Chenthack |
| aved Report Settings - To use previously saved report settings, sel | | | | | | |
| he list the next time you access this screen. | Organizations: | Community Hous | - | ervices | | |
| | Programs: | CHSS TANF/Mote | | | | |
| ate Range - Indicate the time period for his report. Only records the | Grants: | CHSS TANF/Mote | | | | |
| ate range malate are and parted for no report, only records an | Program Types: | Emergency shelte | r | | | |
| | Q1. Report Vali | dation Table | | | | |
| | Total Number of Pe | rsons Served | | | 12 | |
| Prganization - Indicate which organizations should be included in the | Number of Adults (a | 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 lea | avers | | | 1 | |
| | Number of adult an | d head of household | d leavers | | 1 | |
| | Total Number of Sta | ayers | 11 | | | |
| irant(s) - This list displays grants that belong to the organizations y | Number of Adult St | ayers | 8 | | | |
| | Number of Veteran | | | | 3 | |
| And the second se | Number of Chronica | | ns | | 0 | |
| rogram - A list of programs based on the grant selected. | Number of youth u | | | | 1 | |
| , , , , , , , , , , , , , , , , , , , | Number of parentin | | 25 with children | | 1 | |
| House and the second | Number of Adult He | | | | 8 | |
| | Number of child an | - | | | 1 | |
| | Heads of household | is and adult stayers | in the project 365 | days or more | 1 | |
| COC Filter - You may, optionally, identify a single CoC to filter the rep specified, this CoC must match either the client's enrollment head | Q2. Personally I | Identifiable Info | rmation (PII) | | | |
| | Data Element | Client Doesn't Know / Refused | Information Missing | Data Issues | % of Error Rate | |
| | Name (3.1) | 0 | 0 | 0 | 0.00% | |
| etail Export - Click the Run Export button to generate a separate ta ndicate the SSN Masking to be used in the Detail Export. | 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 | | 0.00% | |
| | Ethnicity (3.5) | 0 | 0 | | 0.00% | |
| | Gender (3.6) | 0 | 0 | | 0.00% | |
| | | | | | | |

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

| 📀 🛯 2018 HUD Data Quality Report | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| in the list the next time you access this screen. | |
| Saved Report Settings: | - SELECT - V |
| Date Range - Indicate the time period records that fall within the date range you sele | ect will be included. |
| #1 Date Range Liver | Since This Date, Last Year • 01/30/2019 🖫 to [01/30/2020 🗍 |
| Organization - Indicate which organizations should be included in the report by selecting each organization | ation separately, or click the 🛹 icon to select all. Note: The list only shows organizations you are authorized to view. |
| Organization.* | BHRS CARE of Stanislaus County Catholic Charities of the Diocese of Stockton Center For Human Services Children's Crisis Center CICV |
| Grant(s) - This list displays grants that belong to the organizations you selected above. Indicate which | greate should be included in the report by coloring each grant separately, or click the 🛹 icon to select all. |
| Grant(s): | Filter by Grant(s) CHSS TANF/Motel Vouchers |
| Program - A list of programs based o | |
| #2 Program: | Emergency shelter Filter by Program CHSS TANE/Motel Vouchers B |
| CoC Filter - You may, optionally, identify a single CoC to filter the report results (HMIS implementations If specified, this CoC must match either the client's enrollment head of household CoC or (if that is blar | with only one CoC do not need to do so). k) then this location must match one of the CoC locations identified for the associated program. |
| State Filter for CoC: CoC (Optional): | - SELECT - T |
| Detail Export - Click the Run Export button to generate a separate task to generate the Detail Export. Indicate the SSN Masking to be used in the Detail Export. | |
| SSN Masking: | [XXX-XX-0000 ▼ |
| | 🕹 Report 🔊 Schedule Report 🗙 Cancel |

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

| Ξ | E ClientTrack™ Reports 5 All | Search Q |
|---|------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ? | Modesto Testing | |
| | Files on Server | |
| | | ou to download. Files may be available for a limited time they expire, and will be automatically re er or be available for processing if used in an import once deleted. |
| | <u>Click to view</u> the status of export or import tasks. | |
| | File Name | |
| | HUD Data Quality 2018 | _20200131185217.exe 😮 |

Download the file, then open

| You should have red bar, you may need | Creator Created Patty Estrada 1/31/2020 6.52.17 FM UD Data Quality 2018_20200131186217.e. X Ceived a downicad prompt, however if you see an information 10 cick it to allow the downicad or you can try <u>Liking barrs</u> window will automatically close in 13 seconds. X |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Open when done Always open files of this type Pause Show in folder Https://usw.clienttrack.net/15/mpio Cancel Yu | -i |
| Extract Encrypted File(s) | You need toput in a password, check to assume responsibility, then create a file for the report to go, click ok |
| These files have been encounted to enclose personally identifying information. Once the file(s) has they may contain personally identifying information in plain text. All appropriate cardions should continued protection of this information. Data Systems International (205) is not responsible for the information contained within the file(s). By checking the following box, you acknowledge the responsibility of ensuring the security of the file(s) and any data contained within, including the this data once it is no longer needed. Users of this extraction tool should consult their employer applicable local, state, and federal laws governing the protection of personally identifying inform I assume responsibility for the security of the extracted file(s) Enter or select the directory to extract to C:\Users\fuller\Downloads I view files after extracting If the file(s) already exist Overwrite silently | Id be exercised to ensure the two the protection, use, or misuse of two two two two the protection, use, or misuse of the two |

| Name | Date modified | Туре | 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 |
| 🖲 DQ 4 Detail (Validation Only).csv | 1/31/2020 10:52 AM | Microsoft Excel C | | <u>1 KB</u> |
| 🖾 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

| ~ | | <u> </u> | 0 | - | 1 | 0 | | 1 | - | IX. | - | 141 | 1.4 | · · | 1.1.1 | ~ | IX. | 3 | 1.1.1 | 0 |
|----------|-------------------------------------------------------------------|----------|-----------|----------|--------------|---------------------|--------|---------------------|---------|-------|-----------|---------|--------------|--------|----------|--------|----------|----------|-------------|------------|
| ClientID | Relations | EnrollID | Enrollmer | FirstNam | e MiddleIni | LastName | Suffix | Name | NameQua | SSN | SSNQualit | Birthda | te BirthDate | Races | HUDEthni | Gender | OtherGer | VeteranS | t Disabling | PriorResic |
| | 1 | | ***** | | 1 . T. 191.2 | | | $\Gamma_{\rm cont}$ | . 1 | XXXXX | 1 | ***** | ## : | L 5 | i 1 | . 1 | | 1 | . 0 | 16 |
| | 1 | | ***** | 1.1 | | E | | - e - 1 | 1 | XXXXX | 1 | ***** | ## : | 2 1 | . 0 | 0 | | C |) 1 | 1 |
| Data | Data (DQ 2) this will show any Don't Know, Missing or Data Issues | | | | | | | | | | | | | | | | | | | |
| | | Α | | | В | | | | С | | | | D | E | | F | | | | |
| 1 Dat | ta Eleme | ent | | cl | ientid | Name | | | | | | D | ontKnov | Missin | g Dat | alssue | | | | |
| 2 Soc | 2 Social Security Number (3.2) 1069 Beddy, Films III | | | | | | | | | Yes | | | | | | | | | | |
| 3 Soc | ial Secu | urity Nu | umber (S | 3.2) | 102860 | loomees, Il ymio: Y | | | | | Ye | 25 | | | | | | | | |
| | | 4.1 | | | | | | | | | | | | | | | | | | |

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 Q | | A Patty Estrada (Training) Help Sign Out |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|
| ClientTrack ^{**} Reports a All Search Q | | Tatty Estrada (manility) Help Sign Out |
| | | |
| 🕤 🛨 📧 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 sel | ect will be included. | |
| Predefined Date Range: | SELECT V | |
| Service Date Between:* | 07/01/2019 and 01/31/2020 | |
| Organization(s) - Indicate which organizations should be inclused in the report by selecting each organ | ization 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 Additionally, on this report you can only filter by PATH grants. | s grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting each grant s | epar tely, or click the 🎺 icon to select all. |
| Grant(s): | W 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 d to select all. | isplays programs that belong to the organizations you selected above. Indicate which programs should be inclued on the selecting of the select | eac program separately, or click the 🛹 icon |
| Program(s): | I Filter by Program(s) CES Coordinated Access V PATH Stere Outreach V PATH Supportive Services | |
| CoC Filter - You may, optionally, identify a single CoC to filter the eport results (HMIS implementations Note: This filter only applies to the initial client universe. If specified, this CoC must match either the client's enrollment here of household CoC or (if that is blan | | |
| State filter for CoC: | - SELECT - • | |
| CoC (optional): | Turlock/Modesto/Stanislaus County CoC | |
| | 🖕 Report 🖉 Sche | dule Report 👔 Run Export 🔀 Cancel |

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

| 2 | 2020 PATH | Annual Report | | | - • × | |
|----|-----------|------------------|--------------------------------------------------------|-------------|-------|--|
| 14 | 4 1 | of 🛯 🕨 🖗 | Find Next 🔍 🕀 🗐 😢 | | | |
| | | | | | | |
| | | HMIS PATH An | nual Report | 1 | | |
| | | 7/1/2019 to 1/31 | /2020 | ClientTrack | | |
| | | Organizations: | BHRS | | | |
| | | Programs: | PATH Street Outreach, PATH Supportive Services | | | |
| | | Grants: | HHS PATH Street Outreach, HHS PATH Supportive Services | | | |
| | | CoCs: | Turlock/Modesto/Stanislaus County CoC | | | |

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.



Accessing Client Level Data

Persons Served Detail

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

| 020 PAT | 'H Annual Report | | - |
|---------|------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| 1 | of 5 🕨 🔰 💠 | Find Next 🛃 🚱 🚔 🚺 🔞 |) |
| | | A DESCRIPTION OF A DESC | |
| | HMIS PATH Ar 7/1/2019 to 1/3 | | ClientTrack |
| | Organizations: | BHRS | |
| | Programs: | PATH Street Outreach, PATH Supportive Services | |
| | Grants: | HHS PATH Street Outreach, HHS PATH Supportive Services | Click on the |
| | CoCs: | Turlock/Modesto/Stanislaus County CoC | underlined to expand |
| | Persons served | 16: Persons ser de d during this reporting period: | the detail the section |
| | | rsons contacted by PATH-funded staff this reporting period | 33 |
| | | w persons contacted this reporting period in a PATH Street Outre | |
| | | ew persons contacted this reporting period in a PATH Services On | |
| | 11. Total number contacted) | r of new persons contacted this reporting period (#9 + #10 = tota | il new clients 22 |
| | 12a. Instances of | contact this reporting period prior to date of enrollment | 12 |
| | 12b.Total instance | es of contact during the reporting period | 17 |
| | 13. Number of no ineligibility for P/ | ew persons contacted this reporting period who could not be enr ATH | olled because of 0 |
| Sec. 1 | 14. Number of ne | ew 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 |
| | | ctive, enrolled PATH clients receiving community mental health se at any point during the reporting period | rvices through any 2 |

| of 1 🕨 | ¢ I∢ | Find | Next 🛃 • | ۵ 🖶 🚺 | 0 | | |
|---------------|-----------|-----------------------------------|-----------------------|-------------------------------|----------------------|------------------------------|--|
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| Persons S | erved Det | tail | | | | | |
| Questions 8 | - 16 | | | | Clie | ntTrack™ | |
| 7/1/2019 to 1 | | | | | | | |
| Organization | | 20 | | | | | |
| Programs: | | ୍ର 'H Street Outreach, PATH Si | innortive Servic | -Ac | | | |
| Grants: | | 5 PATH Street Outreach, HH | | | | | |
| CoCs: | | ock/Modesto/Stanislaus Co | | tuve services | | | |
| COCS. | Turi | ouv modestoy stariisiadis de | unty coc | | | | |
| Program N | ame | 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 | | |
| DATH Street | Outreach | Camacho, Alex | 05/01/2019 | | | | |

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

| 1 | Teport Vie | wer | | - 0 | x |
|-----|------------|----------------------|------------------------------------------------------------------------------------------------|-----|---|
| 1 | 14 4 1 | of 1 ▷ ▷∥ | 4 Find Next 🛃 🕞 📾 📳 🔞 | | |
| g | | | Excel Data PDF Word | | |
| | | Persons Served | I Detail | | |
| alı | | Questions 8 – 16 | ClientTrack | | |
| | | 7/1/2019 to 1/31/202 | 20 | | |
| | | Organizations: | BHRS | | |
| | | Programs: | PATH Street Outreach, PATH Supportive Services | | |
| h | | Grants: | HHS PATH Street Outreach, HHS PATH Supportive Services | | |
| | | CoCs: | Turlock/Modesto/Stanislaus County CoC | | |
| | | Program Name | Client Name Project Date of PATH Project Exit PATH Entry Date Determination Date Enrollment | | |
| ir | | | Status | | |

| | А | В | С | D | E | F | G | н | 1 | J | К | L | М | N | 0 | Р | Q | R |
|---|-----------|-----------|-----------|------------|--------|------------|----------|------------|------------|-----|----------|-----------|-----------|-----------|----------|----------|-------------|-----------|
| 1 | Organizat | ProgramN | ProgramIE | ProgramT | CaseID | CaseName | ClientID | ClientNan | BirthDate | Age | SSNQuali | t Race_Am | Race_Asia | Race_Blac | Race_Nat | Race_Whi | i Race_Clie | Race_Clie |
| 2 | BHRS | PATH Stre | 19581 | Street out | t 8338 | Ohmsford | 10823 | Ohmsford | Full DOB F | 19 | Full SSN | Yes | No | No | No | No | No | No |
| 3 | BHRS | PATH Stre | 19581 | Street out | t 8402 | River, Joa | 10852 | River, Joa | Full DOB F | 43 | Full SSN | No | No | No | No | Yes | No | No |
| 4 | BHRS | PATH Stre | 19581 | Street out | t 8486 | Swoop, Ar | 10896 | Swoop, Ar | Full DOB F | 43 | Full SSN | No | Yes | No | No | No | No | No |
| 5 | BHRS | PATH Stre | 19581 | Street out | t 8487 | Dale, Chip | 10897 | Dale, Chip | Full DOB F | 26 | Full SSN | No | No | No | No | Yes | No | No |
| 6 | BHRS | PATH Stre | 19581 | Street out | t 8489 | Adams, Je | 10804 | Adams, Je | Full DOB F | 47 | Full SSN | No | No | No | No | Yes | No | No |
| 7 | BHRS | PATH Stre | 19581 | Street out | t 8511 | Dirk, Simo | 10917 | Dirk, Simo | Full DOB F | 25 | Full SSN | No | No | Yes | No | No | No | No |
| 8 | BHRS | PATH Stre | 19581 | Street out | t 8555 | Smith, Joe | 10646 | Smith, Joe | Full DOB F | 19 | Full SSN | No | No | No | No | Yes | No | 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 | Provideo | l |
|----------|-------|----------|----------|---|
| | | | | , |

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

| | 1 ▷ ▷] | \$ | Find Next 🔍 🤇 | € [] @ | |
|-----|----------------|---------------|-----------------------------------|------------------|--------------------------|
| | | | | | |
| | | | | | |
| | | | | | |
| Se | rvice and | Referrals Pr | ovided Detail Report | | |
| Qu | estions 17 – | 18 | | | ClientTrack […] |
| 7/1 | /2019 to 1/31, | /2020 | | | |
| Org | anizations: | BHRS | | | |
| Pro | grams: | PATH Street C | utreach, PATH Supportive Services | | |
| Gra | nts: | HHS PATH Str | eet Outreach, HHS PATH Supportive | Services | |
| Col | Es: | Turlock/Mode | sto/Stanislaus County CoC | | |
| Or | ganization | | Program Name | Client Name | Most Recent Service Date |
| BH | RS | | PATH Street Outreach | Espinoza, Sunny | 9/24/2019 |
| BH | RS | | PATH Supportive Services | Johnson, Steven | 8/10/2019 |
| BH | RS | | PATH Supportive Services | Kellett, Carol | 9/25/2019 |
| BH | RS | | PATH Supportive Services | Railey, Courtney | 9/24/2019 |
| | ntTrack™ Rep | orts | Page 1 of 1 | | 1/31/2020 4:33:17 PM |

| Α | В | С | D | E | F | G | Н | I. I. | J |
|---------|--------------|--------------------------|-----------|----------|------------------|------------|-------------------------|---------------------------|--------|
| Туре | Organization | ProgramName | ProgramIC | ClientID | Name | ServiceDat | 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 Asynchronus Tasks

| P Help for Asynchronous Tasks - 🗆 🗙 |
|-------------------------------------------------------------------------------------------------------------------------------------------|
| The list of background tacks to be performed and completed |
| The list of background tasks to be performed and completed. |
| <u>Status:</u> |
| Suspended - Task waiting on user to complete some setup portion need for the task to complete successfully |
| Pending - All required steps have been completed task ready and waiting to be processed at the next available processing time. |
| Processing - Background service is currently actively processing the task |
| Completed Successfully - Task completed as expected without errors |
| Error - There was an error running the task review the log to determine what may have caused the task to be unsuccessful in execution. |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |
| |

CES Coordinated Access Data Entry

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 popup 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

lientTrack[™]

Did you forget your password?

Sign In to ClientTrack User Name Ifullerm Password

Sign in

- 3. 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

Plota 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

9/16/2019 September 16, 2019 09:00 AM Eastern Daylight Time SALT LAKE CITV-(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 Role our PRAPARE SDOH Screening Tool on its Care Coordination Platform appeared first on Eccovia Solutions.

Visit <u>EccoviaSolutions.com</u> 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 <u>critical</u> that you make sure to change to the correct organization: <u>Continuum of Care</u> when entering ALL of the CES Assessments into HMIS

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

138

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

| ClientTrack** Clients + All Search | | a` | | Rayleigh Partain (Training) | Help | Sign Out |
|------------------------------------------------|------------|-------------------------|-------------|-----------------------------|------|----------|
| TSAAnonymous Anonymous 4 | 1719 | #1 | | | | |
| Find Citert TSAAnonymous Anonymous's Dashboard | | | | | | |
| TSAAnonymous Anonymous's Information | | | | | | - |
| | Name: | Anonymous, TSAAnonymous | Birth Date: | 6/1/1992 | Age: | 27 |
| #2 | Gender: | Male | | | | |
| | Ethnicity: | Non-Hispanic/Latino | | | | |
| | Client ID: | 11719 | Race | White | | |
| TSAAnonymous's Enrollments | | | | | | - |

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

| Ξ | ClientTrack [™] Clients All Search Q | | Rayleigh Partain (Training) Help Sign Out |
|----|-------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------|
| | TSAAnonymous Anonymous 6/1/1992 Male | | |
| -6 | 🕞 🛧 🔍 Find Client | | 2 🗈 🖨 🔋 |
| | Use the section criteria below to find your client. To narrow the search, fill in more than one | criteria. Social Security Number and Birth Date are the best fields to narrow your search. | |
| | | | |
| | First Name: Last Name: | | |
| | Middle Name: | | |
| | Full Name (Last, First): | | |
| | Social Security Number: | | |
| | Birth Date: | | |
| | Scan Client ID: | | Search |

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 |
| | | | | |

When you click on the [1], 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.

| Ξ | ClientTrack [™] | lients a All Search Q | | | Rayleigh Partain (Training) | Help Sign Out |
|-------|--------------------------|--------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|----------------------------------------------------------|-----------------|
| 00 33 | Mark Mitchell | | | | | |
| 56 | Intake (2298) | Client Information | | | | 🖹 الا 🕄 |
| 1223 | 11 × | 0 | | | • | |
| 1223 | Basic Client | Search Existing Clients | | | Basic Client Information | |
| 613 | Information | Suffix: | | | | |
| 1222 | Family Members | | - antiantie reported | • • | | |
| | O Program Enrollment | | 424 - 06 - 9480 🤎 | | | |
| 100 | | Basic Client Demographics | | | | |
| 633 | | Birth Date: | 12/30/1976 📰 🤒 | | | |
| 533 | | Client Age: | 42 | | | |
| | | Date of Birth Quality:* Ethnicity:* | Approximate or Partial DOB Reported Full DOB Reported Client doesn't know Used White collected White vollected White vollected | | | |
| | | 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 🔹 🦉 | | | |
| | | Show Address and Contact Information: | | | | |
| | | Family Information - Use this section to collect data about a client's family. The Fa family. | mily search field allows you to search for and select | an existing family acco | ount. This is appropriate when adding a family member to | o an existing |
| | | Family: | | | | |
| | | Relationship to Head f Household:* | Self • * | | | |
| | | Begin Date: | 11/25/2019 | | | |
| | | End Date: | 10 A | | | |
| | | | | | M Previous | Finish |

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

| Ξ | ClientTrack™ Clie | ents + All Sea | arch | ٩ | | | | | Ray | leigh Partain (Training) | Help Sign Out |
|-----|-----------------------------------------------------------------------|-----------------------|------------------------------|--------------------|-----------------------------|-----------------------|------------------------------------------------------------------|--------------------------|-------------------------|--------------------------|--------------------------------------------|
| 0 | Mark Mitchell | CLIENTID 11758 | 1 | | | | | | | | |
| | Intake (2298) | 🗧 🔚 Family Members 🔤 | | | | | | | | | |
| 101 | н х | The selected client's | family members are dis | played below. You | a may search for existing o | lients to add to this | family or add new clients to th | e database and associate | them with this famil | y. | |
| | Basic Client Information Family Members Program Enrollment | together to a continu | uum project for assistan | ce and who live to | | t (or, for persons wh | same as a client's household. to are not housed, who would in | | | | rsons who apply |
| | #1 | | Middle Last Name A Name A | Suffix 🔺 | Name Quality' 🔺 | Birth Date* 🛥 | result found (+1). Age Birth Date Quality* = | Gender' 🦉 🔺 | SSN 🔺 | SSN Quality' + | Relationship to Head of Household" + |
| | | 🕑 dark 🛛 | Edward Mitchell | | Full name reporte • | 12/30/1976 🛅 | 42 Full DOB Reportec • | Male • | 424 - 06 - 9480 | | Self |
| | | | | 0 | SELECT * | | N/A - SELECT - * | SELECT • | (e) | - SELECT - | · PLECT |
| | | | | | | | | | | | |

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

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

| | 3.0 at 44 m 7 | | |
|-------------------|---------------------------------------|--------------------------------------------------------|--------------------|
| | re than one criteria. Social Security | making and if they were baseded | " itt off |
| Angeina | | | |
| Mitchell | | | |
| | | | |
| | | ESN # ESN | Cash |
| (H H) | | * 4/4 ·00 · 9480 | |
| 5 | | | |
| | | • · · · · · · · · · · · · · · · · · · · | anc |
| | A serve | | |
| Nid records found | | | |
| Middle Name a. | SSN a Birth Date a. | | |
| | | | |
| | Mitchell | Net recently found Maddie Name a SSN & Brith Date A | Annow your search. |

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 Reaction again.

| | ease address the following: There is 1 row in the result set that | t requires attention | | — #1 | | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|----------------------------|---------------------------|--------------------------------------------------------------|------------------------------|----------------------------------------------|------------------------------------------------------------------|
| | The selected client's family members are dis | splayed below. You may se | arch for existing clients | to a | add new clients to the dat | abase 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 me 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 (fr. 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 fam | ily members or select will | an raminy members you | want to enroll. | | | #2 |
| + | +) | | | 1 result found | 1 (+2). | | |
| _ | H Birth Date Quality* ▲ Gender* ♥ ▲ | SSN 🔺 | SSN Quality* 🔺 | 1 result found Relationship to Head of Household* 🔺 | i (+2). Veteran Status* 🔺 | Race* Ethnicity* 🔺 | Veteran Status is a required field. Relationship to Head |
| | Birth Date Conduct 1 | ssn ▲ ▼ 424 - 06 - 9480 | | Relationship to Head | | Race* Ethnicity* ▲ V White Non-Hispanic/Lat | |
| | Birth Date Quality [▲] Gender [*] ℗ ▲ | | | Relationship to Head of Household* 🔺 | Veteran Status* 🔺 | ' | P • Relationship to Head |

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 and 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



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.



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

Save

#2. The Project Start Date will default to the date of entry, so change if needed by clicking on

| the c | date. Then click | (| | | | | | |
|-----------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
| Intake (2298) | Elect the Project you are enrolling the | | ck will displa | y a list of clients in the client' | s family. Please select all the clier | nts you are enrolling. | <u>s</u> |) 🗿 🚔 🏹 |
| Basic Client Information Family Members Program Enrollment | will allow clients to re-enter as neces • for Safe Havens and Transitional H • for all types of Permanent Housing 1) Information provided by the client homeless long enough to qualify – th 2) The client has indicated they want 3) The client is able to access service time | ight the client first sta sary without "exiting a ousing – it is the date , including Rapid Re-F or from the referral inc iough all documentation to be housed in this p as and housing throug ts including but not lin | red in the she nd restarting the client mo ousing – it is icates they n in may not ye oject; in the project. | Iter for the consecutive shelt ' for each stay for a specified wes into the residential projec : the date following application heet the criteria for admission thave been gathered; The expectation is the project | period. tt (i.e. first night in residence). n that the client was admitted int n (for example if chronic homeles tt has a housing opening (on-site, | to the project. To be a sness is required the site-based, scattered | ich use a bed-night tracking method will have a proje dmitted indicates the following factors have been m client indicates they have a serious disability and har haite subsidy) or expects to have one in a reasonably re it is the date the client first began working with the | et: ve been short amount of |
| | Project * CES Coordinated Access * 😻 | | | | | | | unit (or, for |
| | persons who are not housed, who would live together in one dwelling unit if they were housed)." | | | | | | | |
| | Name Mitchell, Mark Edward | Gender 🔺 Male | Age 🔺 | Start Date | Case Manager 🥹 🔺 Kayleigh Partain | 0. | Relationship to Head of Household* ▲ Self T | 5 |
| | Mitchell, Angelina | Female | 40 | | Nayleigh Faltain | Q | SELECT • | 81 |

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.

| Intake (1259) | Eamily Members 🕨 HUD Program Enrollment 🕨 🦯 Universal Data Assessment | 🗐 🗈 🖬 🚍 | | | | | |
|---------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------|--|--|--|--|--|
| | × Master Assessment Active Change Assessment Date | | | | | | |
| Basic Client Information Family Members Program Enrollmer Baley, Kent Universal Data | Universal Data Assessment* Information Date Age at Assessment 20 Assessment Type: Disabling Condition.* Ves | × #1 | | | | | |
| Assessment Barriers / Special Ne Domestic Violence | 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. dis Client Location := (CA-S10 - Turlock/Modesto/Stanislaus County CoC ♥) Living Situation - Identify the type of residence and length of stay at that residence just prior to (iii, the night before) program admission. | | | | | | |
| 5 Income | | mily member's room, apartment or house | | | | | |
| | Health Insurance - Please indicate whether or not the client is covered by health insurance. If so, you Detsuit Last It Covered by Health Insurance * No | will be able to record health insurance sources for the client. | | | | | |
| | Type A Status" A | Reason No 🖬 🔺 Other Coverage A | | | | | |
Living Situations

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

| Tune of Residence 1 | Place not meant fo | whahitation (e.n. avel | icle, an abandoned building, bus/train/subway station/airport or anywhere outside) (16) |
|----------------------------------------------------------------------------------------------|---------------------|-----------------------------|-----------------------------------------------------------------------------------------------|
| The or compared | | or instantines (e.g., a res | on, an addition to descend cost into the second and on a part of a part of the second of (10) |
| 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 right-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 tir | me 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 Medi-



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 | CLIENTID 11758 |
|--------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| Intake (2298) | Would you like to skip this step? Would you like to skip this the Self Sufficiency Evaluation step? |
| Basic Client Information | ▶ Yes |
| Family Members | × No |
| Program Enrollment | |
| 🕸 Mark Mitchell 🛛 🔺 | |

| Intake (2298) | C Universal Data Assessment > 🕂 Self-Sufficiency Matrix | 🚍 🕃 👔 🚔 |
|-----------------------------------------------------------|-------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| п х | Rate the client's level of self-sufficiency at the assessment point-in-time on a so | ale 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. |
| Basic Client Information | | Default Client's Last Assessment 🧐 |
| Family Members | Assessment Active | |
| Program Enrollment | | 11/25/2019 |
| 😋 Mark Mitchell 🔷 🔨 | Assessment Type:* | |
| 🔉 New Assessment 🔒 | Comments: | |
| Would you like to skip this step? | | |
| Self Sufficiency Matrix | Income:* | 0 1 - No Income |
| Which Vulnerability Index for this client? | | 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 |
| Barriers / Special Needs | | \odot 5 - Income is sufficient, well managed; has discretionary income and is able to save |
| Domestic Violence | Employment:* | 1 - No Job 2 - Temporary, part-time or seasonal; inadequate pay; no benefits |
| Income | | 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 - Th | e Matrix Score calculates the everage of all domain scores between 1 and | d 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 | |
|-----------------------------|--------------------------------------|
| Intake (2298) | Would you like to skip this step? #1 |
| Basic Client Information | Ves |
| Family Members | × No |
| Program Enrollment | |
| 📀 Mark Mitchell 🛛 🤸 | |

VI SPDAT

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

| Mark Mitchell | CLIENTID 11758 | |
|--------------------------------------------------|--------------------------------------------|----|
| Intake (2298) | Which Vulnerability Index for this client? | #1 |
| н х | Which Vulnerability Index for this client? | |
| Basic Client Information | 🖧 VI-SPDAT - Single | |
| Family Members | SPDAT - Family | |
| Program Enrollment | | |
| 🗴 Mark Mitchell 🗛 | 🏰 TAY-SPDAT - Youth | |
| 🔉 New Assessment 🔒 | No SPDAT at this time, continue | |
| Would you like to skip | · · · · · · · · · · · · · · · · · · · | |

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.

| ą | Mark Mitchell | e CLIENTID A |
|----|-----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| In | take (2298) | 🗧 Universal Data Assessment 🕨 Self-Sufficiency Matrix 🕨 📥 Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT) 🔤 🕕 🚛 |
| • | Basic Client Information | 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. |
| | Family Members | Assessment Active |
| ¢ | Program Enrollment | |
| ¢ | Mark Mitchell | Administration |
| 6 | New Assessment | Interviewer Name: Kayleigh Partain Agency: © Team © Staff © Volunteer |
| | Would you like to skip this step? | Date/Time:* 12/17/2019 106:24 🙀 Interview Location: |
| | Self Sufficiency Matrix | Basic Information |
| ΙĬ | Which Vulnerability | Name: Mitchell, Mark Edward |
| ľ | Index for this client? | Nickname: |
| | VI-SPDAT | In what language do you feel best able to express yoursel? - SELECT - Soc Sec No: 424 +06 - 9480 |
| | Barriers / Special | Age at Assessment: 42 Birthdate: 12/30/1976 Has Consented to Participate? No Yes |

SCORING SECTION

| SECTION | SCORE | | Results | | |
|-----------------------------------------|-------|------|-----------------------------------------------------------------|--|--|
| PRE-SURVEY | 0 | Scor | e Recomendation | | |
| 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 | | | | |
| Grand Total | 9 | | | | |

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

| click save | | |
|-----------------------------------------------------------------------------------------------------|----------------------------------|------|
| 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 | 1 |
| Is there a phone number and/or email where someone can get in touch with you or leave a message? | | 0 |
| Phone: | | |
| Email: | | |
| Photo Permission: | No Ves Refused | |
| | | Save |

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 Revealed as the save a close Revealed as the save as the save a close Revealed as the save as the save a close Revealed as the save as the save a close Revealed as the save a close Revealed as the save as the save as the save a close Revealed as the save as the
- **#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.



Domestic Violence

| asessment 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.

| intake (2298) | | 😤 🕏 vulnerability index (VI) and Bervice Prioritization Decision Assistance. Tool (SPDAT) 🕨 Domestic Violence Assessment 🕨 📥 Income and Sources, Non-Cash Benefits 📃 💽 👔 🚍 |
|-------------------------------------------------------------------------------------------------------------|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | × | Indicate below the client's sources of monthly income, non-cash benefits and expenses. |
| Basic Client | | The following instructions are quoted from the HMIS Data Manual: |
| Information | | 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. |
| Family Members | | 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-Heed for heads of household and adult household on members. Projects may choose to collect this information for all household members includers. |
| Program Enrollme | int | 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 |
| Advanta & Attended I | | |
| | ^ | 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 |
| Mark Mitchell New Assessment | ^ | |
| | ^ | 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 |
| New Assessment Would you like to s | skip | 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.nbut, but the client is currently working 20 hours per week for \$12.00 an hour, records 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] |
| Would you like to a this step? | skip | chern has not yet secured additional employment, the response for Earned income would be "No." As a further example, if a client's most recent psychicit was 2 weeks ago from a job in which the client was working full time for \$15.00.nbuc, but the client is currently working 20 hours per week for \$12.00 an hour, records the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour). |
| New Assessment Would you like to t this step? Self Sufficiency M VI-SPDAT Barriers / Special | skip | client has not yet secured additional employment, the response for Earned income would be "No." As a further example, if a client's most nevent psychick was 2 weeks ago from a job in which the client was working full time for \$15.00,hou; 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] |
| New Assessment Would you like to this step? Self Sufficiency M VI-SPDAT | skip | 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 psychicit was 2 weeks ago from a job in which the client was working full time for \$15.00 nbuc, 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] Attacesament Active |
| New Assessment Would you like to t this step? Self Sufficiency M VI-SPDAT Barriers / Special | skip atrix | client has not yet secured additional employment, the response for Earned income would be "No". As a further example, if a client's most neuron paycheck was 2 weeks ago from a job in which the client was working full time for \$15.00.nbuc, but the client is currently working 20 hours per week for \$12.00 an hour, records the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour). Default Last Assessment Assessment Active Assessment Date.* 11/25/2019 |

- #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

| | | ate:* 04/03/2017 | |
|--------|--------------------------------------------------------------------|-----------------------------|---------------------|
| | Income from Any Sou | | |
| | Non-Cash iBenefits from Any Sou | | |
| | Expen | ses: SELECT ··· | |
| | | | #1 |
| ncome | | | |
| 0 | туре ≜ #2 | Description 🛧 | Monthly Amount + |
| | Earned Income #2 | | |
| 8 | Unemployment Insurance | | |
| 0 | Supplemental Security Income | Sam \$600.00 | \$600.00 |
| 1 | Social Security Disability Income | | |
| 8 | Private Disability Insurance | | |
| 8 | Worker's Compensation | | |
| 1 | VA Service-Connected Disability Compensation | | |
| 1 | VA Non-Service-Connected Disability Pension | (#F) | |
| | Pension or retirement income from a previous job | #5 | |
| 0 | TANF | | \$400.00 🕫 |
| | General Assistance | | |
| 9 | Retirement (Social Security) | | |
| 3 | Child Support | | |
| | Alimony | | |
| 1 | Other Income | | |
| Non-Ca | No Financial Resources #3 | Count/Total Monthly Income: | 2 \$1,000.00 |
| | Туре 🛥 | Description 🛥 | Monthly Amount A |
| | Special Supplemental Nutrition Program for Women, Infa | nts, and Children | |
| 2 | Supplemental Nutrition Assistance Program (SNAP) | | \$200.00 |
| | TANF Child Care Services | | |
| | TANF Transportation Services | | |
| | Other TANF-funded Services | | |
| | Other Source | | |
| | Section 8, Public Housing, or Other Rental Assistance ¹ | | #4 |
| | Temporary rental assistance ¹ | | |
| | ¹ Deprecated in 2017 (HMIS v6.1) | Count/Total Monthly Income: | 1 \$200.00 |
| | Deprecated in 2017 (minis vo.1) | Sound I she manny months. | |
| | | | |
| | | | Save and Close |

Completing Intake Workflow

#1 Make sure to click Finish: Close the workflow to complete the Workflow

| Intake (2298) | п | × | You're done! All required steps have been completed. | #1 | |
|-----------------------------|---|---|---------------------------------------------------------|----|--|
| Basic Client Information | | | Finish Close 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

| Mark Mitchell | CLIENTID | A | | | | | | | |
|---------------------------------------|-------------------------------|----------------------------|----------------------------|--------------------------------|-------------------------------------------------|-------------------|---------------|-----------|------|
| Mark Mitchell's Dashbo | pard | | | | | | | | |
| Mark Mitchell's Information | | | | #1 | | | | | ~ |
| | | Name: | Mitchell, Mark Edward < | # 1 | Birth Date: 12/30 | 1976 | | Age: 42 | |
| | | Gender: | Male | | | | | | |
| ŧ4 🔍 | | Ethnicity: | Non-Hispanic/Latino | | | | | | |
| | | Client ID: | 11758 | | Race: White | | | | |
| Mark's Enrollments | #3 | | | | | | | | 4 |
| Enrollment Description # Active | Active Household Memiliers | Household Type | Project Start Date Housing | g M #2 found. ect Exit Date | Case ID EnrollID Days Enrolled Exit Destination | Organization | Last Assessed | Program 1 | Туре |
| CES Coordinated Access | 1 | Household without Children | 11/25/2019 | | 9498 12040 22 | Continuum of Care | 11/25/2019 | 6 | |
| Mark's Services | | | | | | | | | 4 |
| | | | | No records found. | | | | | |
| Date | Service | | | Units | \$ Total Organization | | | | |

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**



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 12/30/1976 Male | CLIENTID | Û. | | | | | | | | |
|----------------------------------|-----------------------------|----------------------------|----------------------|----------------------|-------------------|----------------------------|------------------------|-------------------|---------------|-------------|
| Mark Mitchell's Dashb | oard | | | | | | | | | |
| Mark Mitchell's Information | | | | | | | | | | |
| | | Name: | Mitchell, Mark Edwar | d | | | Birth Date: 12/30/1976 | | ٨ | ge: 42 |
| | | Gender: | Male | | | | | | | |
| | | Ethnicity: | Non-Hispanic/Latino | | | | | | | |
| | | Client ID: | 11758 | | | | Race: White | | | |
| Mark's Enrollments | | | | | | | | | | |
| | | | | | result found. | | | | | |
| Enrollment Description | Active Household Members | Household Type | Project Start Date | Housing Move-In Date | Project Exit Date | Case ID EnrollID Days Enro | led Exit Destination | Organization | Last Assessed | Program Typ |
| a Active | | | | | | | | | | |
| 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?



CE Assessments

It will show two Assessments: Entry and Other, which is the VI SPDAT (verify both are showing)

| 🗎 🔍 Master Assessmen | nts | | | | 🔜 🚯 🗿 📲 🚔 |
|-------------------------------------|-----------------------------------------------------------------|---------------------------------------|--------------------------------|------------|------------------|
| lelow is a list of Master Assessmer | nts that have been created for this client. Please use the HMIS | workflows to add or edit assessments. | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | 2 results found. | | | |
| ate 🔝 | Program | | Assessor 🔺 | Comments 🔺 | AssessID |
| ate ♥ 1/25/2019 9:30AM | Program CES Coordinated Access | Туре 🛋 | Assessor 🔺 Kayleigh Partain | Comments 🔺 | AssessID 1296 |

CE Barriers

| The client's history of identified his | arriers or presenting issues displays below. To record a po | w barrier elick Add New. To record multiple new barriers elick Oui | ck Barriers. To view or edit an existing barrier, click Edit next to the record |
|----------------------------------------|-------------------------------------------------------------|--------------------------------------------------------------------|---------------------------------------------------------------------------------|
| The client's history of identified bi | amers or presenting issues displays below. To record a ne | w barner, click Add New. To record multiple new barners, click Qu | CK Damers. To view of eart an existing barrier, click Eart lexit to the recon |
| | | | |
| | | 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 |

CE Domestic Violence

| E 🗙 🔍 Don | nestic Violence Assessments | | |
|--------------------|-----------------------------------------------|---------------------------------------------------------------------------|-------------------------------------------------------------------------|
| The client's domes | stic violence assessment history displays bel | ow. 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 🔺 |
| 00 1011 | 11/25/2019 | | Yes |
| 88 | | | |

When you click on the binoculars you will view the actual assessment.

| Domestic Violence Assessments | | | | |
|------------------------------------------------------------------------------------------|--------------------|---------------------------------|-------|------------------|
| If the client has been a victim of domestic violence, select Yes for Domestic Violence E | xperience, and sel | ect when the experience occurre | d. | |
| | | | | |
| | | Assessment: | | |
| | Date | Program | Туре | User |
| | 11/25/2019 | CES Coordinated Access | Entry | Kayleigh Partain |
| Assessment Dat | e:* 11/25/201 | 9 | | |
| Domestic Violence Experience | e:* Yes | | | |
| When Experience Occurre | d:* Within the | past three months | | |
| Currently Fleein | g:* Yes | | | |

CE Enrollments

| Il of client's enrollments display below. A | in enrollment represents a defined p | period of participation in a grant a | nd/or program. From here, you can enroll a clien | t in a program, exit them from a | an existing program or perfor | m annual assessmer |
|---------------------------------------------|--------------------------------------|--------------------------------------|--------------------------------------------------|----------------------------------|-------------------------------|--------------------|
| | | | | | | |
| | | | 1 result found. | | | |
| Enrollment Description | Case Members 🔺 | Project Start Date 👓 | Housing Move-In Date 🔺 | Exit Date 😎 | Exit Destination 🔺 | Organization 🔺 |
| rrent | | | | | | |
| CES Coordinated Access | 1 | 11/25/2019 | | | | Continuum of Car |

When you click on the binoculars Mou will view the Enrollment Case Members

| CES Coordinated Access > Record Enrollment Case Me | mbers | | | |
|----------------------------------------------------------|-------------------------------------------------------|----------------------------------------|---------------|-------------|
| The Case Members display below. To view or add the house | hold application select the edit button on the left l | hand side of the member you would like | e to edit. | |
| | | | | |
| | | 1 result found. | | |
| Case Member 🔺 | Grant 📥 | Relationship 📥 | Enroll Date 🔺 | Exit Date 🛋 |
| Mitchell, Mark Edward | | Self | 11/25/2019 | |

CE Financial Assessment

| | Rinancial Assessments | | | | | | | 🔄 🛈 g 🛛 🖏 🖨 🛜 |
|---------|-----------------------------------------------------|---------------------------------------|-----------------------------------|----------------------|----------------------|-------------------------------------------|---------------------------------------------|-----------------|
| elow is | a list of the client's previous financial assessmen | ts. To create a new financial assessn | nent, click Add New | Financial Assessment | . To edit an existin | g assessment, click Edit | Income or Edit Expenses next to the record. | |
| | | | - | | | | | |
| | | Family Summ | sary: 🔥 🔁 | | | | | |
| | | 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 A | | | Monthly Total Income All Sources) + | Monthly Expenses + | Month 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 | Туре | User | | |
| | | 11/25/2019 | CES Coordinated Access | Entry | Kayleigh Partain | | |
| | | | | | | | |
| | Assessment Date | e:* 11/25/201 | 19 | | | | |
| | Income from Any Source | e:* Yes 🤒 | | | | | |
| | Non-Cash Benefits from Any Source | e:* Yes 🤒 | | | | | |
| | Expenses | s: 🤒 | | | | | |
| | | | | | | | |
| Income | | | | | | | |
| | | | | | | | |
| | Type 📥 | | | | t. | Description 🔺 | Monthly Amount |
| 2 | Earned income | | | | | | 2600.00 |

CE Housing Assessment Disposition at Exit

| E 🖈 🖲 | C Housing Assessments | |
|-------|-----------------------|------------------------------|
| | | 1 result found. |
| | Assessment Date 🔺 | Disposition 🛋 |
| | 08/06/2019 | Referred to rapid re-housing |

CE Release of Information



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 lowincome 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

| Below is a lis | of the client's self-sufficiency matrix assessments | a. To complete a new matrix, click Add New Self-Sufficiency Matri: | x. To edit an existing matrix, click Edit next | to the record. |
|----------------|-----------------------------------------------------|--------------------------------------------------------------------|------------------------------------------------|----------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | 1 result | tound. | |
| | Date 🔽 | 1 result | score 🛋 | Comments 🔺 |

When you click on the binoculars in you will view the actual Self-Sufficiency Matrix Assessment

| | | Assessment: | | | | | |
|------------------------------------------------------------------------------------------|------------------|----------------------------------|------------|-----------------------------|------------------------|----------------------------|-------------|
| | Date | Program | Type | Hear | | | |
| | 11/25/2019 | | | | | | |
| Assessment Date:* | 11/25/201 | | | | | | |
| Assessment Type | | 9 | | | | | |
| Comments: | | | | | | | |
| Income: | 2 - Inadequ | ate income and/or spontan | eous or i | happropriate spending | | | |
| Employment:* | 2 - Tempor | ary, part-time or seasonal; in | adequal | e pay; no benefits | | | |
| Housing.* | 1 - Homele | ss or threatened with eviction | n | | | | |
| Food:* | 2 - Househ | old is on food stamps | | | | | |
| Childcare:* | 6 - N/A | | | | | | |
| Children's Education:** | 6 - N/A | | | | | | |
| Adult Education: | 3 - Has hig | h school diploma/GED | | | | | |
| Legal:* | 4 - Has suc | ccessfully completed probati | on/paro | e within past 12 months; | no new charges file | i; recently resolved other | legal issue |
| Health Care:* | 3 - Some п | nembers (e.g. Children) on M | edicaid | or other state-sponsored | health insurance pro | gram. | |
| Life Skills:* | 3 - Can mee | et most but not all daily living | needs | vithout assistance | | | |
| Mental Health:* | 3 - Mild syn | nptoms may be present but a | re trans | ent; only moderate difficu | Ity in functioning due | e to mental health problen | 15 |
| Substance Abuse:* | 5 - No drug | use/alcohol abuse in last 6 r | nonths | | | | |
| Family Relations:* | 1 - Lack of r | necessary support from fam | ly or frie | nds; abuse (DV, child) is p | resent or there is chi | ld neglect | |
| Mobility:* | 2 - Transpo | rtation is available but unreli | able, unp | redictable, unaffordable; r | may have car but no | insurance, license, etc. | |
| Community Involvement:* | 1 - Not appl | licable due to crisis situation | in "surv | val" mode | | | |
| Safety:* | 3 - Current I | level of safety is minimally a | dequate; | ongoing safety planning i | s essential | | |
| Parenting Skills:* | 3 - Parentin | g skills are apparent but not | adequat | 2 | | | |
| Credit History:* | Outstanding | g judgments or bankruptcy/f | oreclosu | re | | | - |
| | | | | | | | |
| trix Score Summary - The Matrix Score calculates the average of all domain scores betwee | een 1 and 5, exc | luding domains where Not Appli | able is s | lected. | | | |

CE VI SPDAT

| | Prioritization Decision | Assistance Tool (VI-SPDAT/Fami | K(E).VE-SDDAT) Accomments | for the selected client | are displayed below | | | | 31 XI 🖷 |
|----------------------------------------------------|-------------------------|-------------------------------------|----------------------------------|--------------------------|---------------------------|------------------------|------------------------------|--------------------------|---------|
| tability index dervice P | -nonuzation Decision | Assistance Tool (VESEDAT/Talli | (I) (I) (I) Assessments | s for the selected cheft | are displayed below. | | | | |
| ntation of the tool by 0 s and/or Org Consultin | | nc. or an approved and certified tr | ainer of Licensor. It is not per | nissible to alter the wo | rding or scoring of the V | II-SPDAT or F-VI-SPDAT | forms without permission and | written consent from Com | munity |
| | | | | | | | | | |

When you click on the binoculars you will view the actual VI SPDAT Assessment

| C VFSPDAT/F-VFSPDAT History Vulnerability Index (VI) and Service Prioritization Dec | cision Assistance Tool (SPDAT) | 🔤 🚯 🗿 🖨 |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| | ClientTrack Inc. is licensed to include these tools within ClientTrack. The terms of this license require that users must be trained on the ior. It is not permissible to alter the wording or scoring of the VI-SPDAT or F-VI-SPDAT forms without permission and written consent fro | |
| Administration | | |
| Interviewer Name: Kayleigh Partain | Ágency: | Staff |
| Date/Time:* 11/25/2019 9:30:00 AM | Interview Location: | OEC |
| Basic Information | | |
| Name: Mi | litchell, Mark Edward | |
| Nickname: | | |
| In what language do you feel best able to express yourself? En | nglish Soc Sec No: | 424-06-9480 |
| Age at Assessment: 42 | 2 Birthdate: 12/30/1976 Has Consented to Participate? | Yes |
| | SCORE: | |
| IF THE PERSON IS 60 YEARS OF | | |
| A. History of Housing & Homelessness | | |
| 1. Where do you sleep most frequently? (check one): Shelter | | |

CE Universal Data

| | | | | | 🔤 🕕 👔 🐛 I |
|-----------|------------------------------------------|------------------------|-----------------------|----------------------------------------------------------------------------------------------------------------------|----------------------------------------|
| | ent's history of universal da | ata elements. To creat | te a new record, clic | k 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 |
| orkflows. | | | | | |
| | | | | | |
| | | | | | |
| | | | | 2 results found. | |
| Date 7 | Program Nama | Assessment Tune + | Housing Status | | Length of Stay & |
| Date 😎 | Program Name A | Assessment Type + | Housing Status 🔺 | | Length of Stay 🛥 |
| Date 😎 | Program Name A CES Coordinated Access | | Housing Status 🔺 | | Length of Stay 🛳 |

When you click on the binoculars you will view the actual Universal Data Assessment

| C Universal Data Assessments V / Universal Data Assessment | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|---------------------------------------------------------------------|---------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| Complete the information below related to the selected client's housing status and other 3,917 data. Changing any project setup data with existing enrollments may affect or brea | relevant inform ak the logic for 3 | ation. Note: Because 3.917 refle 3.917, 3.917 may not always sho | cts real tii w as expe | me data entry as descr ected because of chan | ibed in the Data Dictionary, the Default Last Assessment button will i aed setup data or missing required data links |
| | | | | | |
| | | Assessment: | | | |
| | Date | Program | Туре | User | |
| | 11/25/2019 | CES Coordinated Access | Entry | Kayleigh Partain | |
| | | | | | |
| Assessment Date: | | 9 | | | |
| Age while in project: | | | | | |
| Assessment Type: Disabling Condition: | Entry | | | | |
| | | | | | |
| Client Location - Select or enter the CoC code assigned to the geographic area where the he | ead of househol | d is staying at the time of projec | t entry. | | |
| Client Location : | * CA-510 - T | urlock/Modesto/Stanislaus | County C | CoC | |
| Living Situation - Identify the type of residence and length of stay at that residence just prior | r to (i.e., the nig | ht before) program admission. | | | |
| Type of Residence: | * Emergency | y shelter, including hotel or n | notel pai | d for with emergenc | y shelter voucher, or RHY-funded Host Home shelter 🤎 |
| Length of stay in the prior living situation: | * 3 | | | | |
| Approximate date homelessness started: | • 9/1/2019 | 0 | | | |
| 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 | e able to record health insurance | sources f | or 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

| € ★ | C Enrollments | | | | | | 🔤 🕕 al 🛤 🚍 |
|-----------|------------------------------------|-----------------------|---------------------------------------|--------------------------------------------------------|------------------------------------------|----------------------------|----------------------------|
| All of cl | lient's enrollments display below. | An enrollment represe | nts 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 e | xisting program or perform | annual assessment updates. |
| | | | | 1 result found. | | | |
| | | | | 1 result found. | | | |
| | Enrolment Description a | Case Members 🔺 | Project Start Date | Housing Move-In Date 🔺 | Exit Date 🔝 | Exit Destination a | Organization 🔺 |
| Current | | | | | | | |
| 14 | 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 be | en created for this client. Please use t | he HMIS workflows to add or edit asse | ssments. |
| | | | |
| | | | |
| | | No rec | ords found. |
| Date 🔽 Program | Type 📥 | Assessor 🔺 | Comments 🔺 |
| | | | |

CE Barriers (Not Enrolled)

| 🛧 🔍 Barriers/Presenting Issues | | | | |
|------------------------------------------------------|-------------------------------|-----------------------------------------|--------------------------------------------------------|---------------------------------------------------------------------|
| The client's history of identified barriers or prese | enting 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? A | Date Assessed 🔝 | | Date Resolved 📥 | Organization 📥 |
| | | | | |

CE Financial

| 🥃 🛨 🔍 Financial Assessments | | | | | 🐷 🚯 हा 📲 🖨 🛜 |
|--------------------------------------------------------|-----------------------------------------------|-----------------------------------|--------------------------------------------|---------------------------------------------------------------|---------------------|
| Below is a list of the client's previous financial ass | essments. To create a new financial assessmer | t, click Add New Financial Assess | ment. To edit an existing asses | sment, 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 | | | |
| | | No records | | | |
| Date 😎 | Monthly Total Cash Income + | | Monthly Total Income (All Sources) ★ | Monthly Expenses + | Monthly Budget # |

CE Self Sufficiency Matrix

| E 🖈 🖲 | Self-Sufficiency Matrix Assessments | | |
|------------|-------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|
| Below is a | a list of the client's self-sufficiency matrix assessments. | To complete a new matrix, click $\mathbf{Add}\ \mathbf{New}\ \mathbf{Self}\text{-}\mathbf{Sufficiency}\ \mathbf{Matrix}.$ To edit an | existing matrix, click Edit next to the record. |
| | | | |
| | | | |
| | | No records found. | |
| Date 🔜 | Туре 🔺 | Score 🔺 | Comments 🔺 |
| | | | |

CE VI SPDAT

| All Vulnerability Index Service Price | ritization Decision Assistance Tool (V | I-SPDAT/Family(F)-VI-SPDAT) A | ssessments for the select | ed client are displayed be | elow. | | | |
|---------------------------------------|-----------------------------------------------------------------------------------------|----------------------------------------|---------------------------|----------------------------|---------------------------------------|---------------------------------|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | munity Solutions are the authors of th Code Consulting, Inc. or an approved a nc. | | | | | | | |
| | | | No reco | rds found. | | | | |
| ssessment ID 💙 Type 🔺 | Vulnerability Index Assessment Date + | Score General | Score Family - | Score History 🛎 | Score Risks + | Score Socialization + | Score Wellness + | Score Total |
| | | | | | | | | |
| E Universal Data A | | | | | | | | se 🗈 🛃 |
| HIVERSAL Data A | | reate a new record, click Add N | ew Universal Data Asser | ssment. To edit an exist | ting record, click Edit . Plea | ase note that in most cases you | u will want to add new or edit | and a second sec |
| | ssessments | reate a new record, click Add N | | ssment. To edit an exist | ting record, click Edit . Plea | ase note that in most cases you | u will want to add new or edit | using the HN |

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

| Harry's Enrollments | | | | | | | | | |
|---------------------------|-----------------|--------------------|----------------------|-----------|-----------------|----------------------------|--------------|------------------------------|--------------|
| | | | | Ν | o records found | L | | | |
| Enrollment Description | Case Members | Project Start Date | Housing Move-In Date | Exit Date | Case ID | Enroll ID Exit Destination | Organization | Last Assessment Completed | Program Type |
| | | | | | | | | | |

You are still able to view all of the CE Assessments through the Navigation Menu, Coordinated Access Tab

| Below is a list of Master Assessmen | ts that have been created for this client. Please | se use the HMIS workflows to add o | r edit assessments. | | |
|-------------------------------------|---------------------------------------------------|------------------------------------|---------------------|------------|------------|
| | | | | | |
| | | | | | |
| | | 2 result | ts found. | | |
| Date 💙 🛛 P | rogram | Туре 🛋 | Assessor - | Comments 🔺 | AssessID 👻 |
| 07/24/2019 C | ES Coordinated Access | Exit | Patty Estrada | | 12037 |

Example: Logged in as Organization: Continuum of Care

The CES Coordinated Access Enrollment is visible on the Client Dashboard

| Harry's Enrollments | | | | | | | | | |
|---------------------------|-----------------|--------------------|----------------------|-----------|----------|----------------------------|-------------------|------------------------------|--------------|
| | | | | 1 result | t found. | | | | |
| Enrollment Description | Case Members | Project Start Date | Housing Move-In Date | Exit Date | Case ID | Enroll ID Exit Destination | Organization | Last Assessment Completed | Program Type |
| ⊿ Current | | | | | | | | | |
| CES Coordinated Access | 2 | 07/24/2019 | | | 8957 | 11403 | Continuum of Care | 07/24/2019 | 6 |

You are able to view CE Assessments as above

| 🕤 📩 🔍 Master | Assessments | | | | Se 🚯 👔 📲 🚔 |
|-------------------------|------------------------------------------------------------|-------------------------------------|-------------------------|------------|------------|
| Below is a list of Mast | er Assessments that have been created for this client. Ple | ase use the HMIS workflows to add o | r edit assessments. | | |
| | | | | | |
| | | 2 result | ts found. | | |
| Date 😎 | Program | 2 result | ts found. Assessor 🔺 | Comments 🔺 | AssessID |

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

| 🗲 ★ 🔍 Client Files | | | a 🕄 🕄 🔤 |
|-------------------------------------------------------------------------------|------------------|----|------------|
| Documents or other files may be stored electronically by uploading them here. | | | |
| Display: | Icons Grid | | 📥 Add File |
| | No records found | I. | |
| Preview A Document Name A File Type Created Date V | | | |

#2 Name Document: Release of Information (ROI) or VI SPDAT

| Client Files > 🕂 Client File | |
|-----------------------------------------------------------------------------------------------|-----------------------------------------------------------------|
| To upload a file and attach it to the Client record, please enter the name of the document an | d click "Browse" to browse for the file on your local computer. |
| | |
| Document Name:* | |
| File Type:* | SELECT V |
| File:* | Choose File O |

#3 Select Appropriate File Type from drop down

| Client Files > + Client File | |
|-----------------------------------------------------------------------------------------------|----------------------------------------------|
| To upload a file and attach it to the Client record, please enter the name of the document ar | d click "Browse" to browse for the file on y |
| | |
| Document Name:* | ROI |
| File Type:* | SELECT 🔹 |
| File:* | SELECT Realese of Information |
| | VI SPDATS |
| | Other |

#4 Choose File

| Client Files V - Client File | |
|-----------------------------------------------------------------------------------------------|-----------------------------------------------------------------|
| To upload a file and attach it to the Client record, please enter the name of the document an | d 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



As soon as you click the X, your Files will show and you can click on the correct file and hit Open





Once saved, it will show the PDF File

| Elient Files | | | |
|-----------------------------------------------------------------------------------------------------------|----------|------------|-----------------|
| Documents or other files may be stored electronically by uploading them here. | | | |
| | Display: | Icons Grid | 1 result found. |
| Preview A Document Name A File Type Created Date V ROI Realese of Information 12/18/2019 12:06PM | | | |