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

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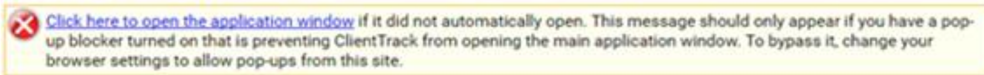
Logging into ClientTrack

Turn off "Pop-up Blockers"

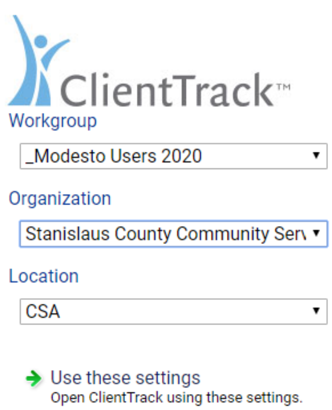


1. Passwords are case sensitive
2. Never let your Internet Browser store your login or Password
3. **Remember**: Sharing your User Name and password is **NOT PERMITTED!**

www.clienttrack.net/modesto

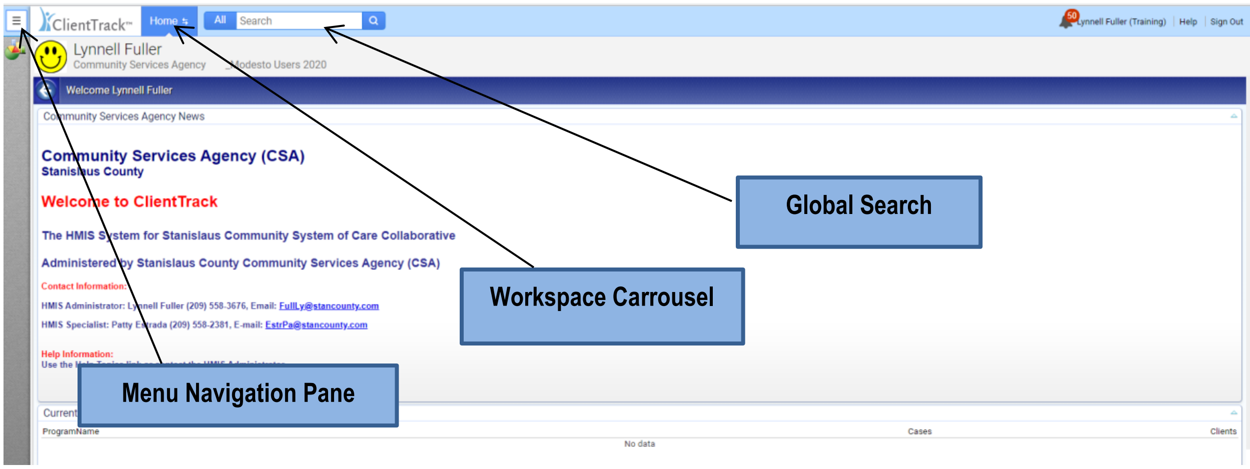
Workgroup: _Modesto Users 2020

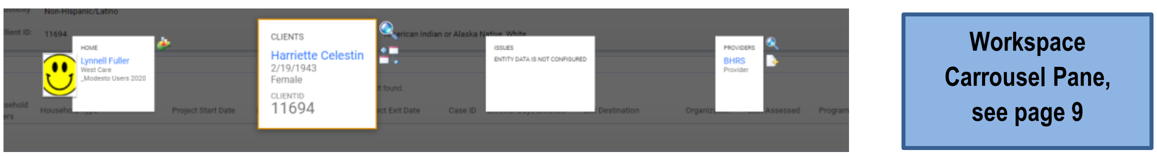
If you have access to more than one organization, it will appear in the Organization dropdown, it is critical that you make sure to change to the correct organization prior to entering data on a client.



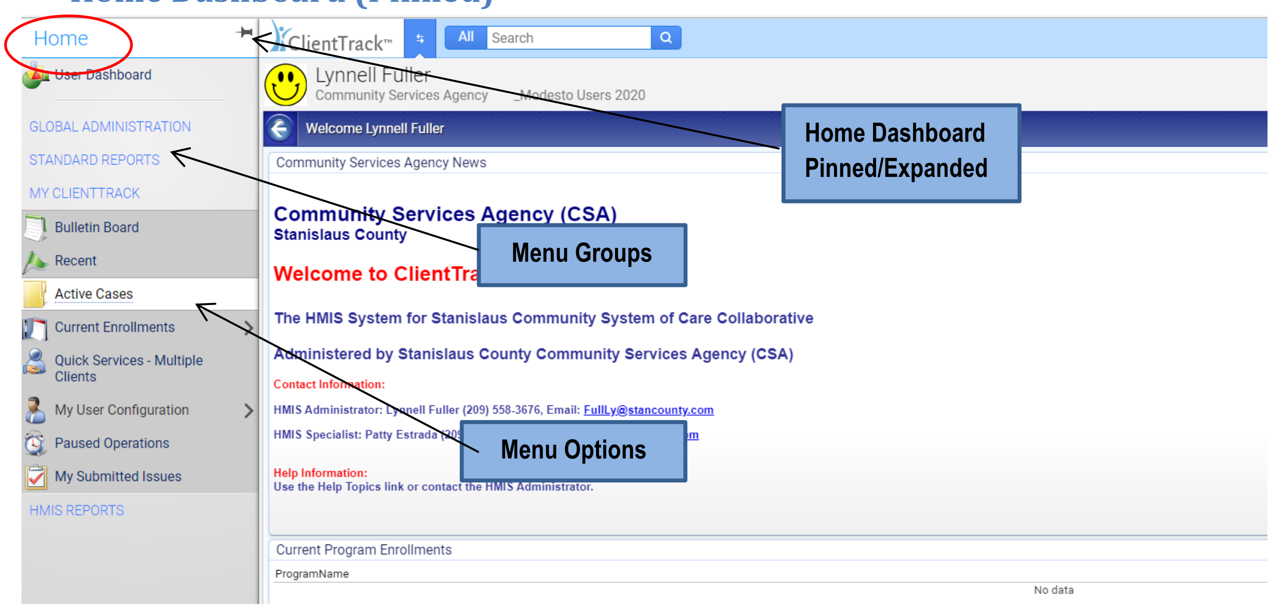
Overview of ClientTrack Features

Home Dashboard



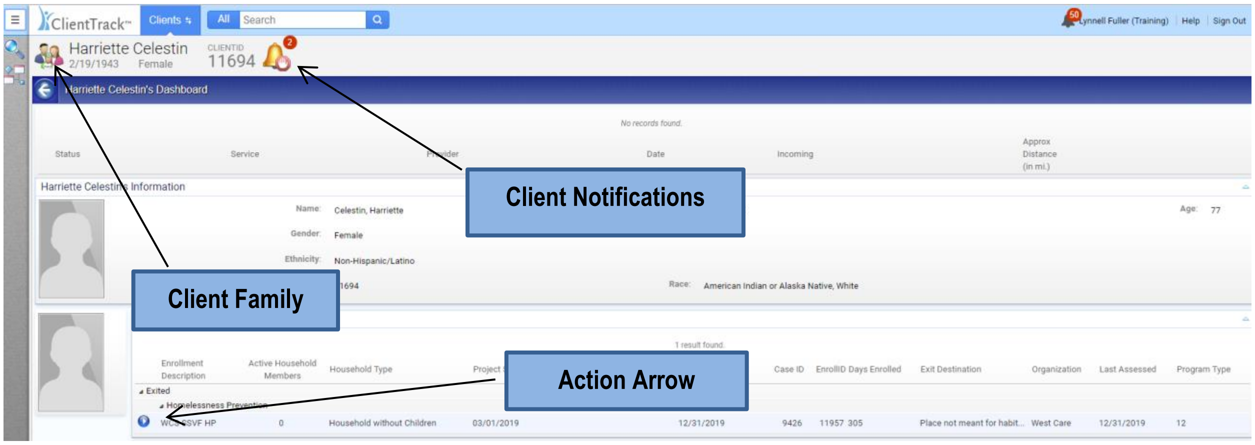


Home Dashboard (Pinned)

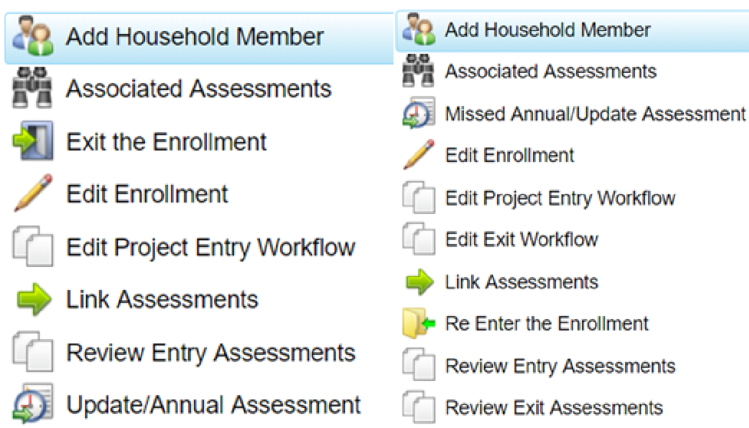


Home Dashboard: This is your "Home Workspace" as a user. Here you can view information specific to you, like your user configuration. Create and run reports, view current enrollments, paused operations, view recent clients and submit issues.
Menu Navigation Pane: Collapsed by default.
Workspace Carrousel: Allows you to navigate from workspaces with one click and view previous information open or launch specific functions (search for client or start workflows).
Menu Groups: Are the Header for what Menu Options are available.

Client Dashboard



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.

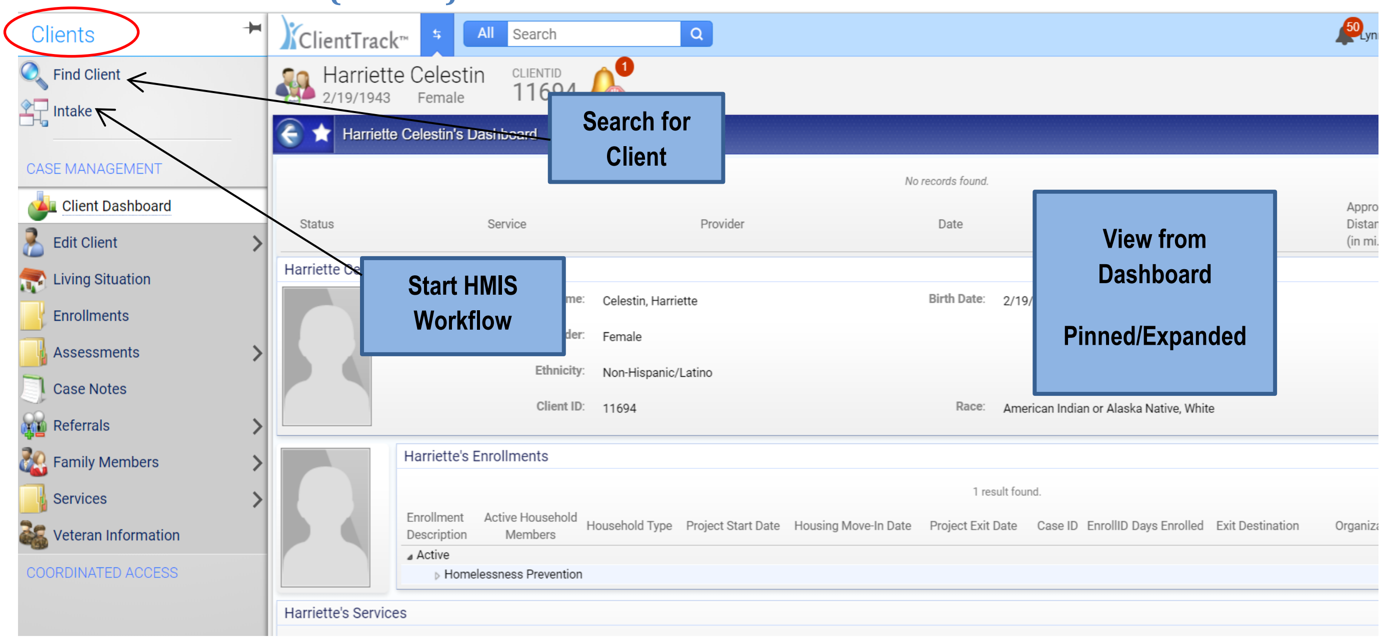
Add Household Member: Use this feature if a new household member needs to be added to the household and enrolled after an enrollment has already been established.

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

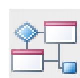
Update/Annual Assessment: Use the Update/Annual Assessment to conduct annual assessments or capture changes to client's status since enrollment. You will also use this workflow to update an enrollment with a Move-In Date (RRH projects) and Engagement Date/PATH Enrolled Status (Street Outreach/PATH projects).

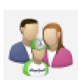
Exit the Enrollment: To exit a client from enrollment, you will be prompted through the exit workflow, for the client and all household members if applicable. If you need to only exit one household member, go to the specific household member's client record and conduct the exit workflow without exiting the household.

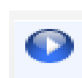
Client Dashboard (Pinned)

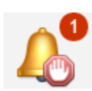


 Search for Client

 Intake (Start Workflow)

 Client Family Members

 Action Arrow

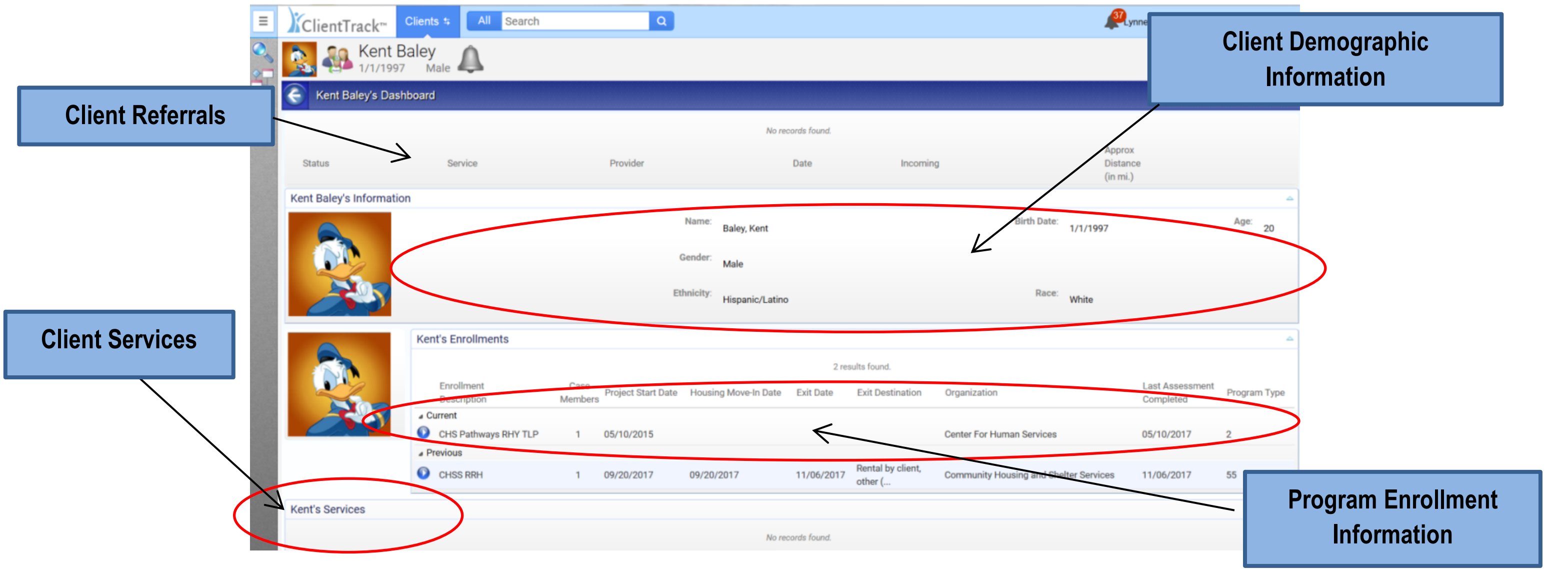
 Client Notification

Search for Client: You should ALWAYS conduct a search for the client prior to entering a client into the system, remembering the "Less is best" mentality. Start with last 4 or SSN and then search again using ONLY the first few letters of the first/last name and not rely solely on the social security number or birth date, as those elements have a higher rate of missing or inaccurate data. Another option for searching is to search different spellings of the client's name and remember to search for nicknames such as "Joe" in addition to "Joseph".

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

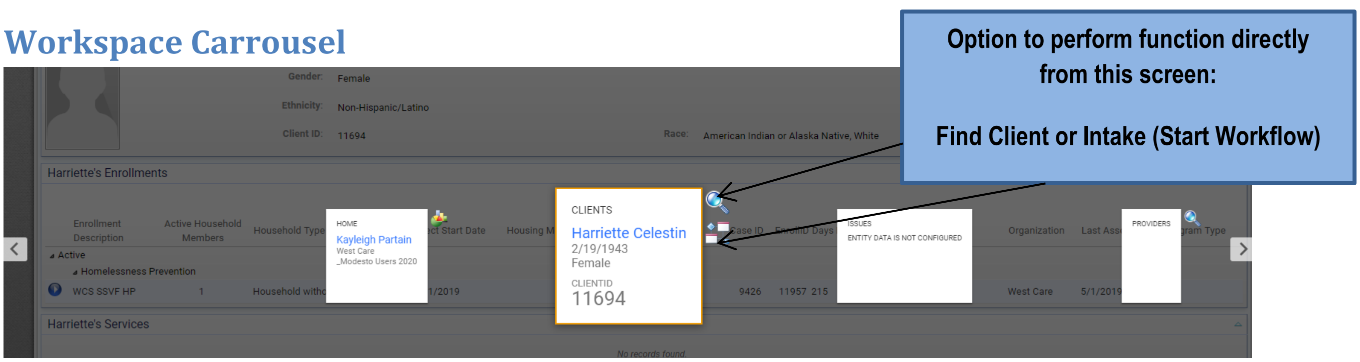
Action Arrow: (Blue Action Arrow) Use this to launch the functions you have access to for each enrollment.

Client Record



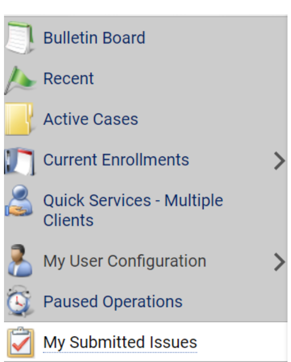
Client Demographic Information: Shows the Client Name, DOB, Age, Gender, Ethnicity, and Race
Program Enrollment Information: Shows the Enrollment Description (Program you enrolled the client in), How many case members are enrolled, Project Start Date, Housing Move-In Date (if applicable), Program Exit 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



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.

Home:



Clients:

Reports:

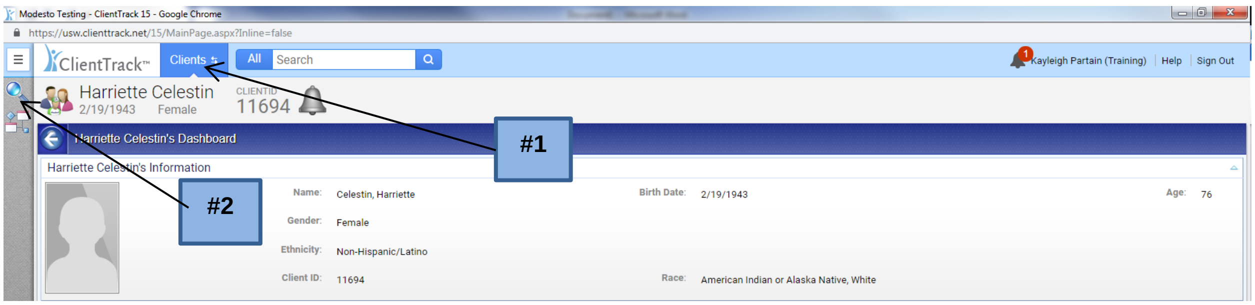
Entering New Project Enrollment

Data Entry

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

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

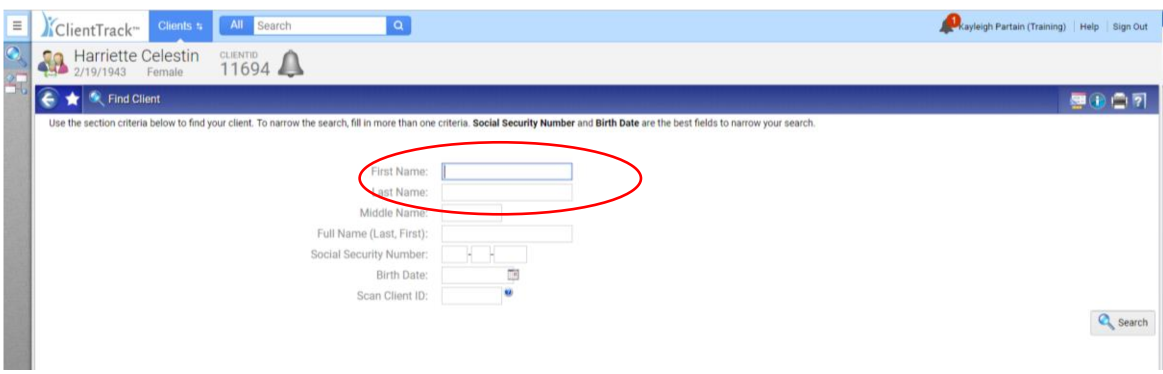
#2. Start by searching for Client, Click Find Client 



Searching Client

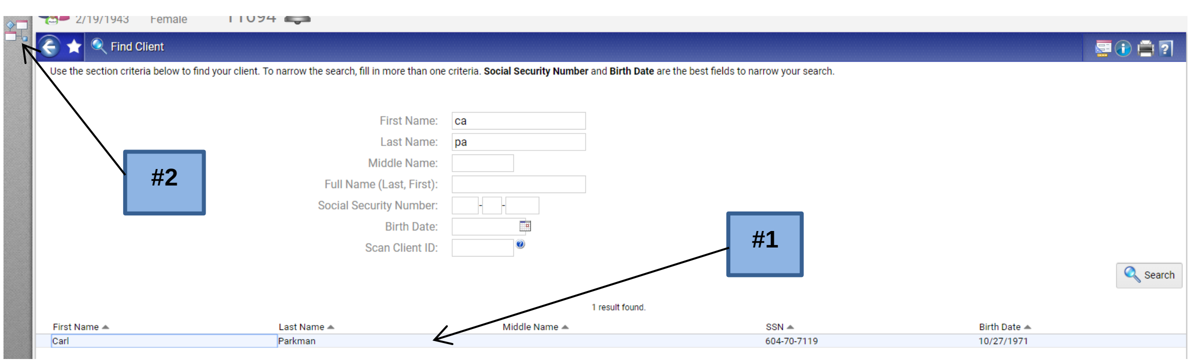
When searching for a client; always remember "Less is best"

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



The system will give a list of names matching your search

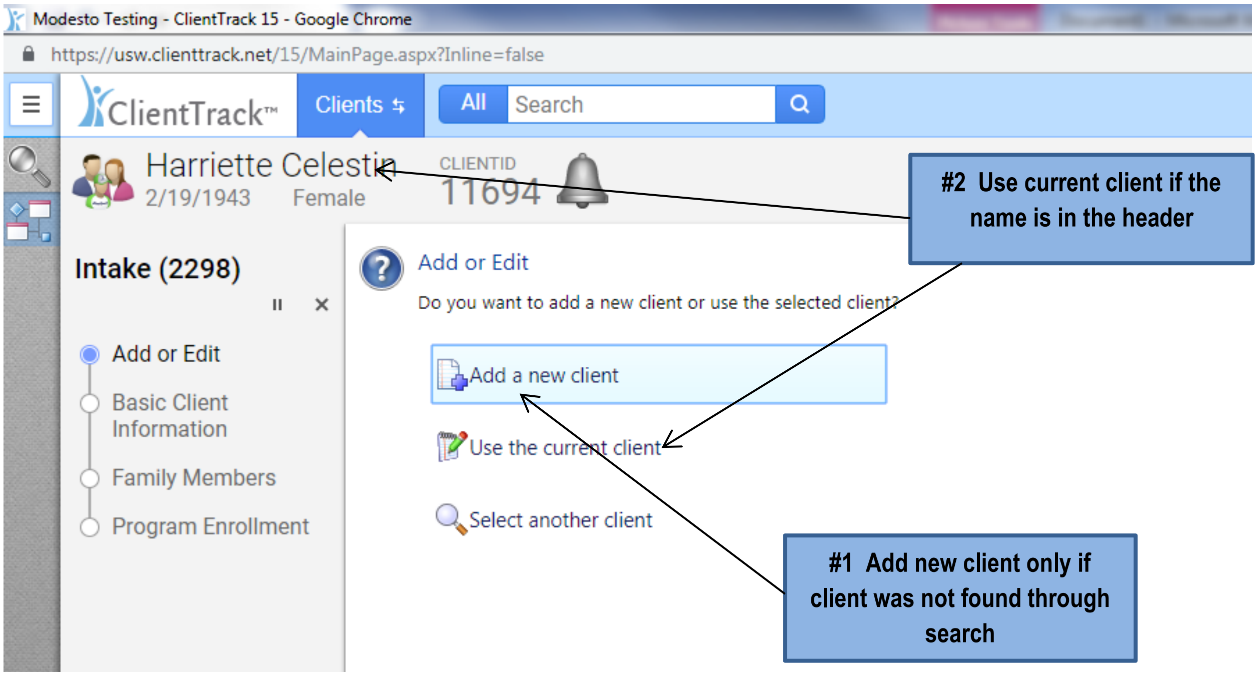
#1. If the correct name appears, highlight and click the correct name below or
#2. If the correct name is not listed, Start Workflow using Intake, top left to proceed with client intake Workflow.



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

#1. If the client is not in the system click, "Add a new client"

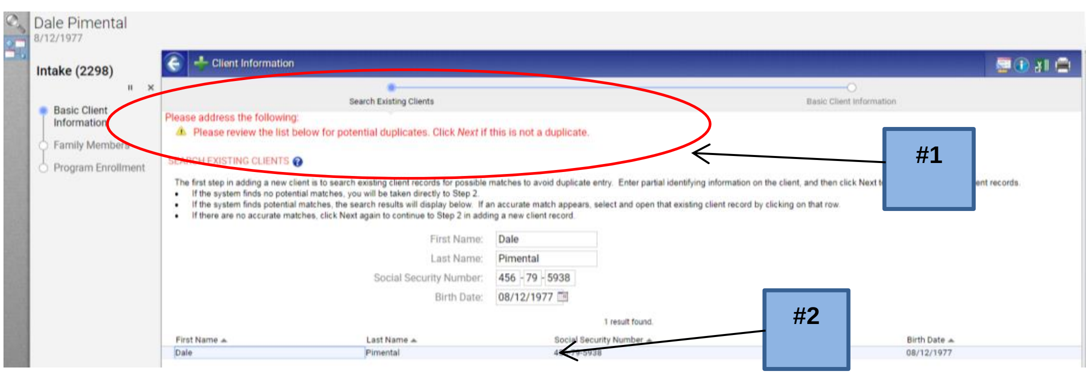
#2. If the client was found through your search and you clicked on the name, they will appear in the header; only click "Use the current client" if the client's name is showing in the header



Workflow for Adding New Client

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

The system will begin by doing another internal search for duplicates



#1. The system will let you know of any potential duplicates, verify that this is not a match to an existing client and proceed by clicking next.

#2. If the correct name does appear, click on the name below to proceed.

When finished, click 

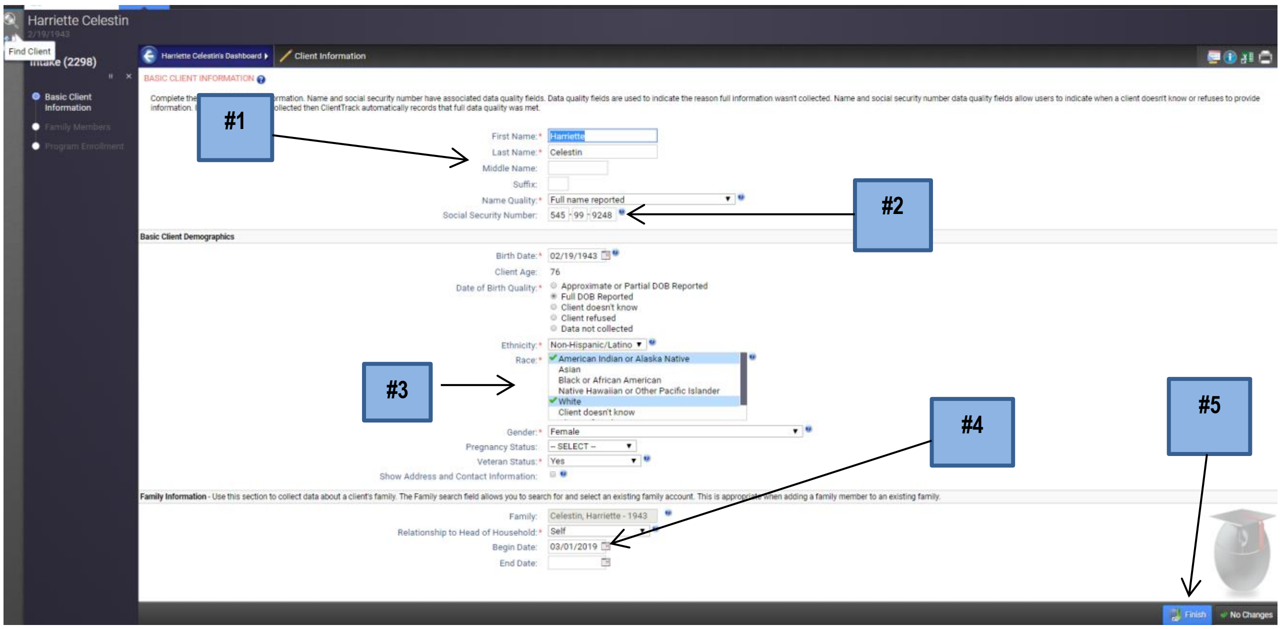
#1. Starting at the top, complete all required fields *

#2. Always make sure if you entered a partial SSN in the search to complete the entire SSN. *DO NOT, under any circumstance, enter a fake social security number such as 999-99-9999; select the data quality option that best reflects the client's response.

#3. Enter Date of Birth, Ethnicity, Race, Gender, and Veteran Status

#4. Under Family Informaiton, Enter the date of the signed ROI under Begin Date

#5. Once complete, click Finish



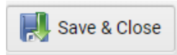
Definitions of Basic Client Information

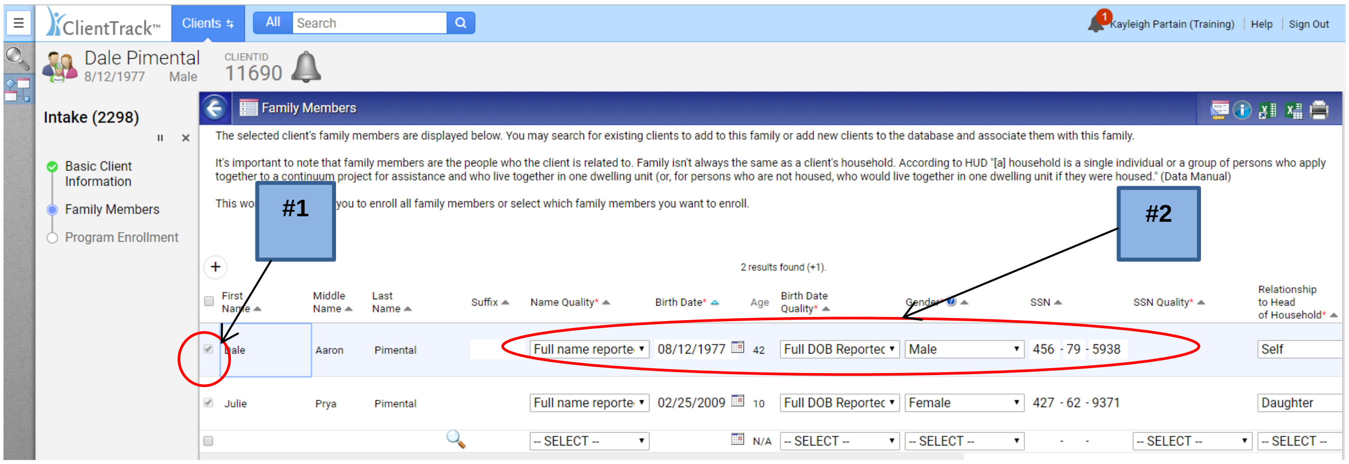
- **First Name:** Legal first name (do not add nicknames in "quotes" because those are not searchable elements). Use Basic English Grammar; do not use all lower or upper case letters.
- **Last Name:** Legal last name
- **Middle Name or Middle Initial:** Please include, this helps if possible duplicates 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.

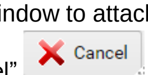
Adding Family Members Durning Enrollment Process

#1. To add additional family members, (if they are not already showing), Click on box to add family member

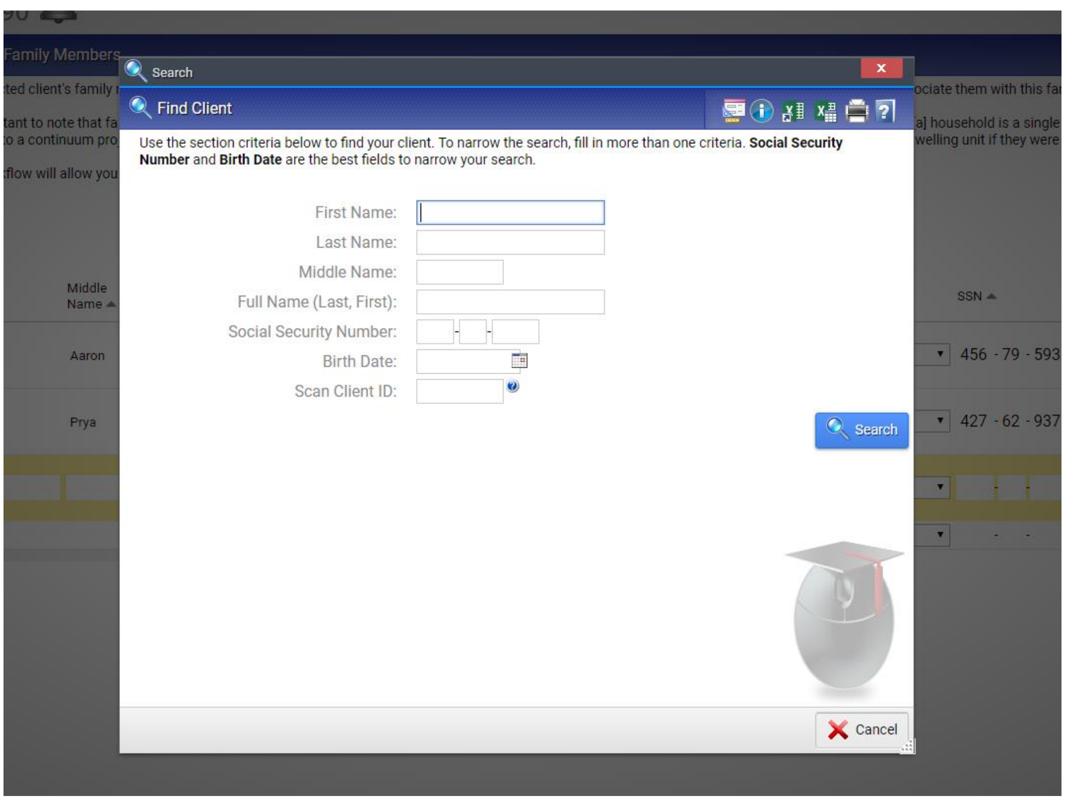
#2. Making sure you then tab or scroll to far right to complete all fields.

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



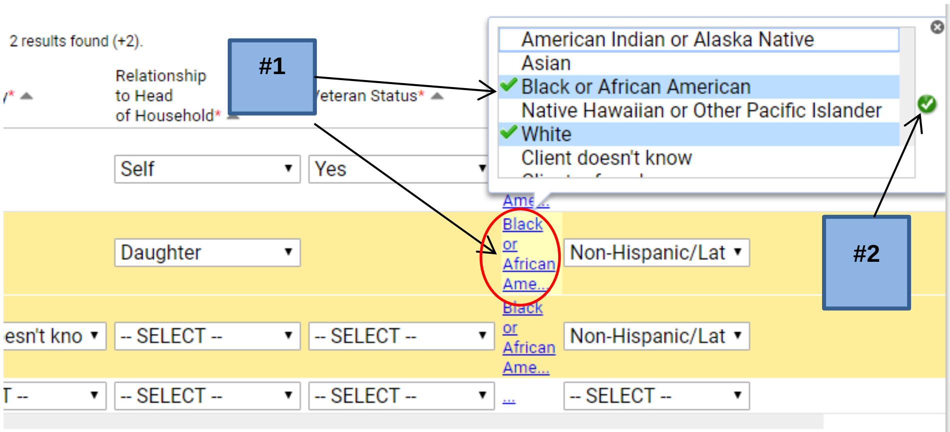
The system will automatically conduct a search for the new household member after you enter the first and last name. If the new household member is already in the system, click on the appropriate name in the search list that appears in the new window to attach the existing client record to the household.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

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



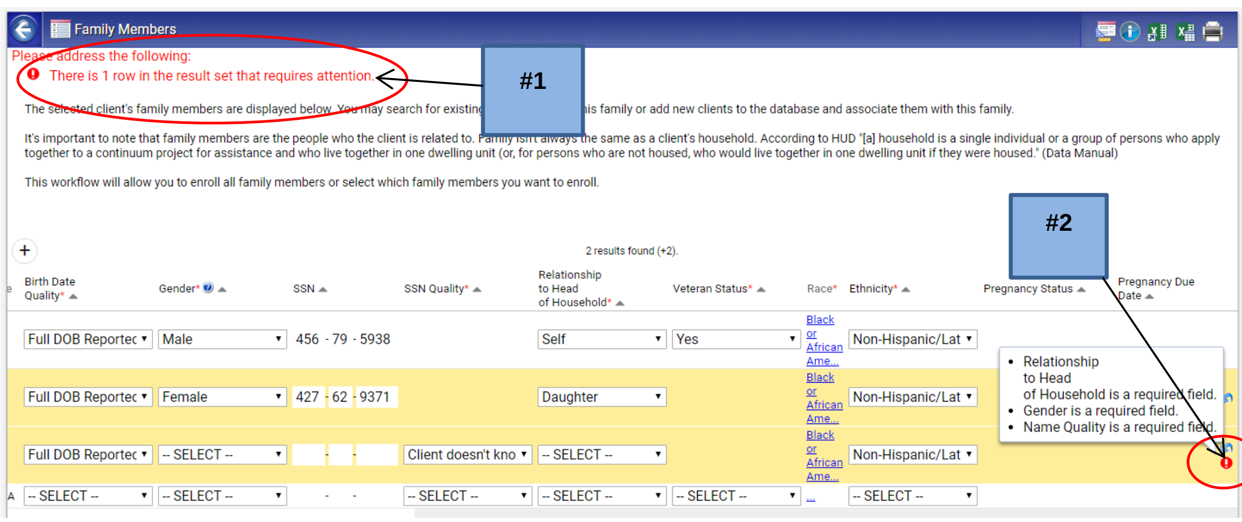
Pay close attention to the Race and Ethnicity fields when adding household members. They will default to the Head of Household selections. If you need to change the Race,

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

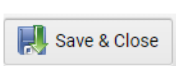


#1. If you are alerted to an error after selecting the "Save & Close"

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



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

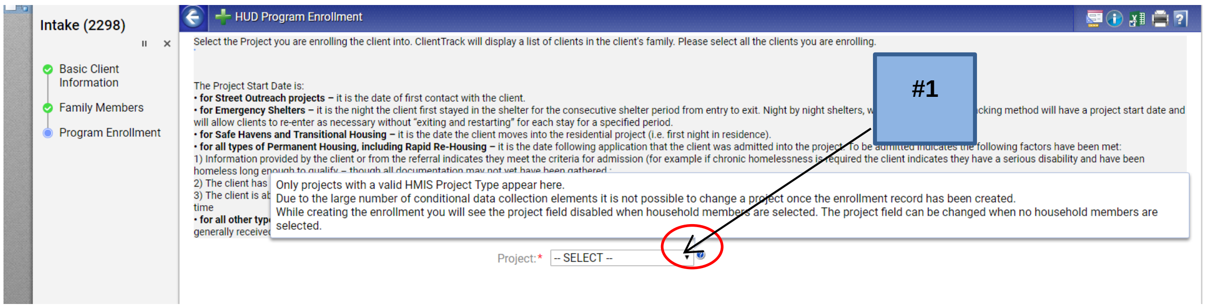


Save & Close: Will save the changes made to the screen and move to the next page.

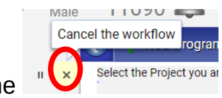
Project Enrollment

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

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

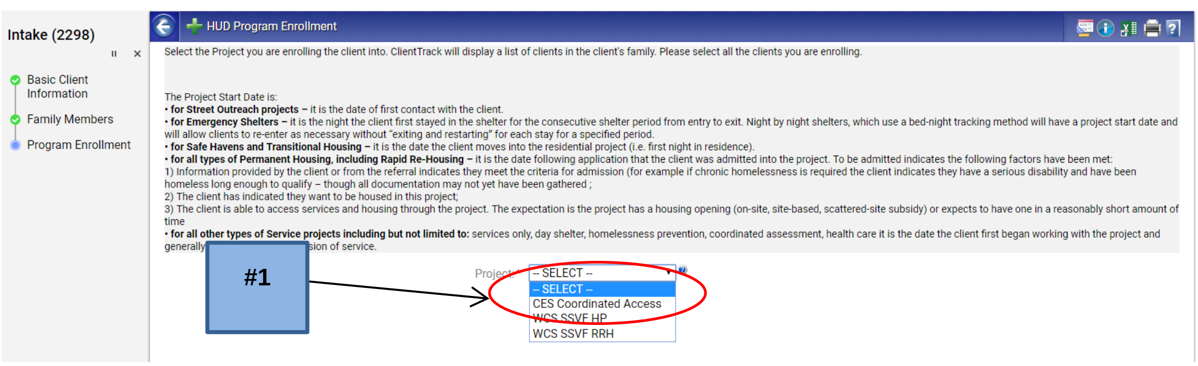


You will only see the options in the drop-down list that your organization has access to or what programs they are set up for. If you do not find your program option when enrolling a client,

PLEASE DO NOT CONTINUE, cancel your workflow by clicking the 

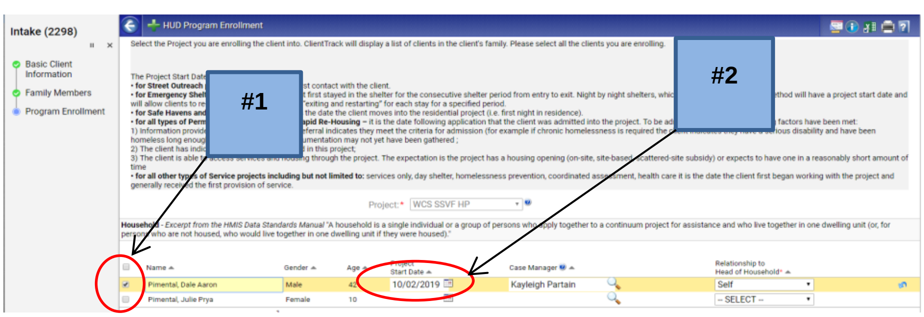
Contact your HMIS System Administrator (209) 558-3676 or HMIS@stancounty.com

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



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

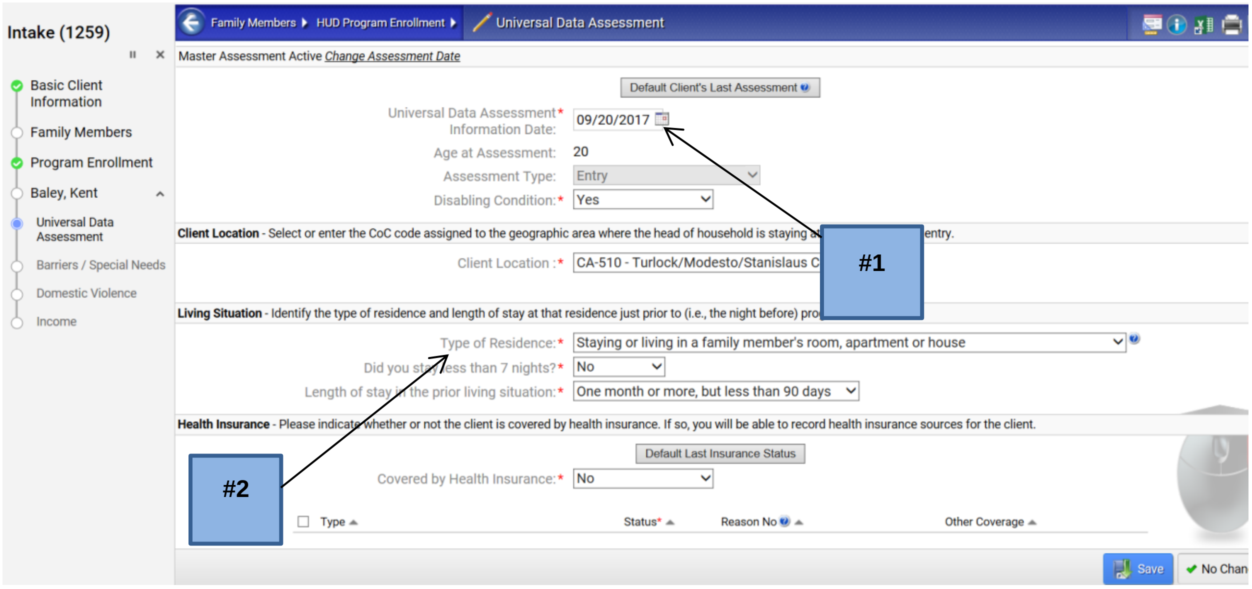
#2. The date will default to the date of entry, so change if needed by clicking on the date. Then save.



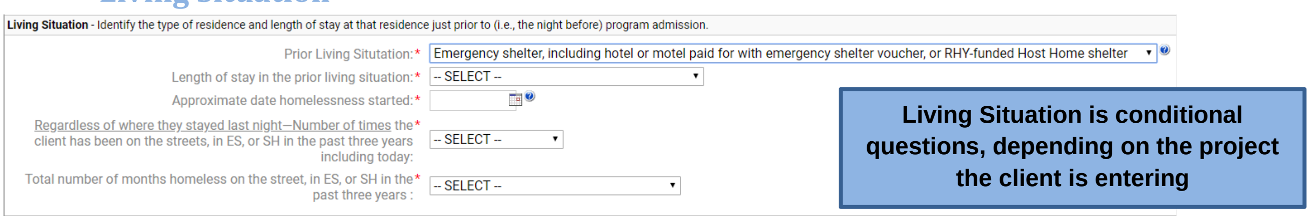
HMIS Universal Data Assessment

#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.



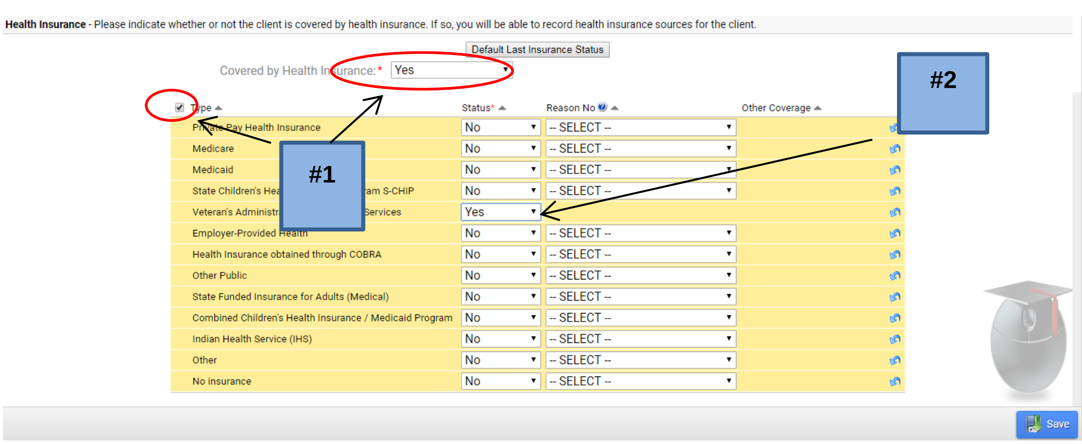
Living Situation



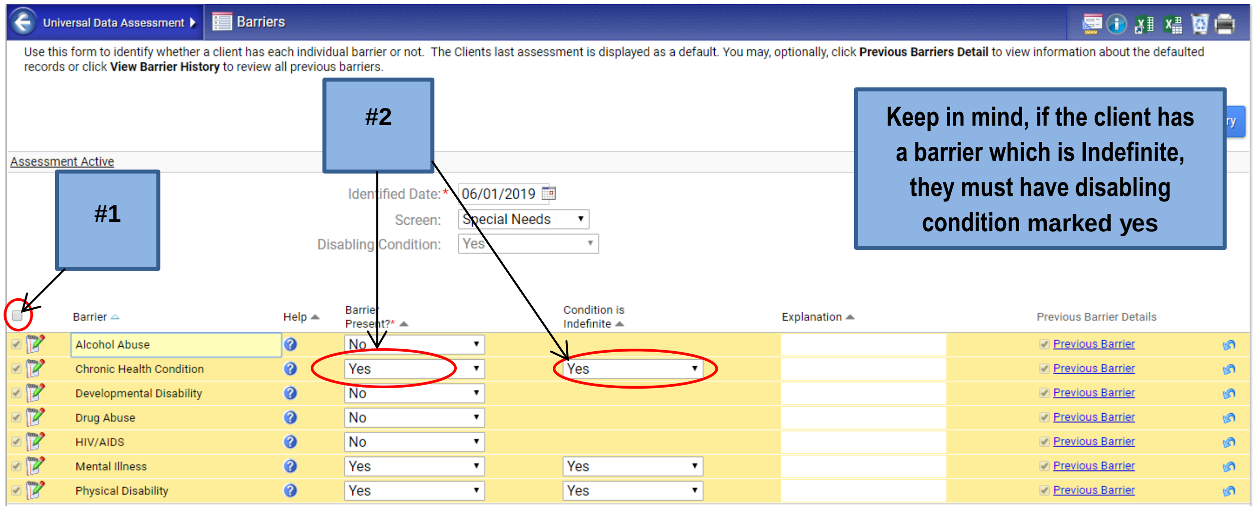
Health Insurance

#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.



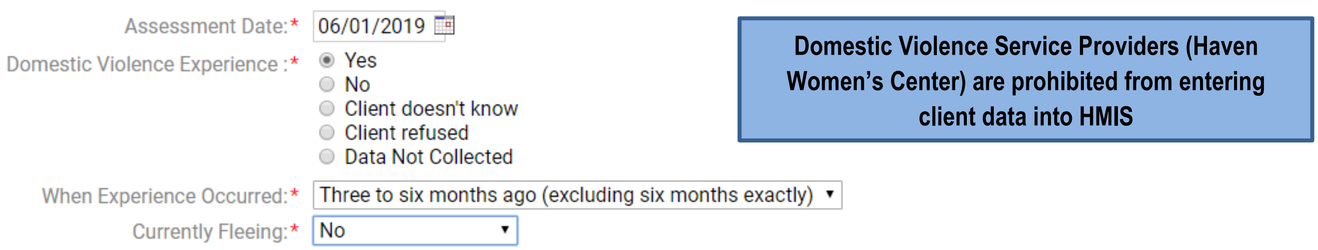
Barriers Assessment



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

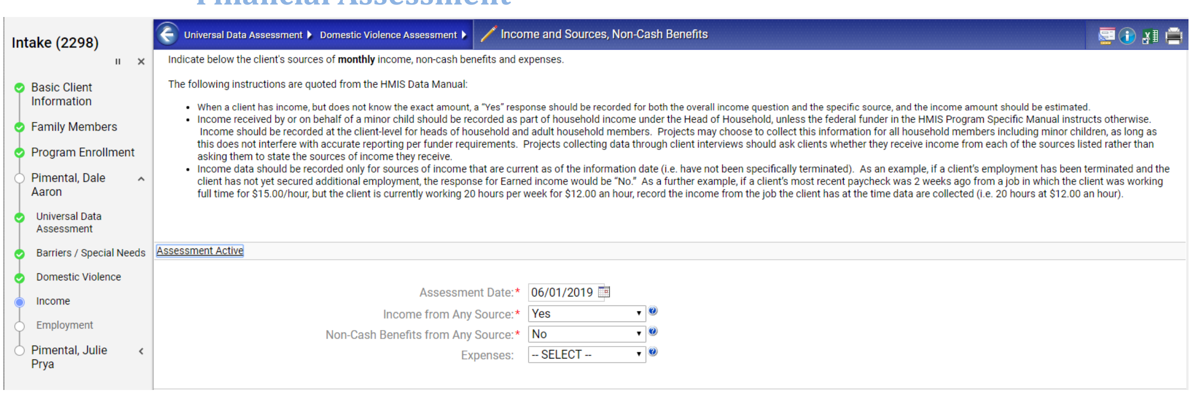
#2. If client has barriers, click the box on the left side, then answer the remaining questions.
*Note: For Developmental Disability and HIV/AIDS, there will not be a drop-down for "Condition is Indefinite" as this is not a required field per the HMIS Data Standards.

Domestic Violence Assessment



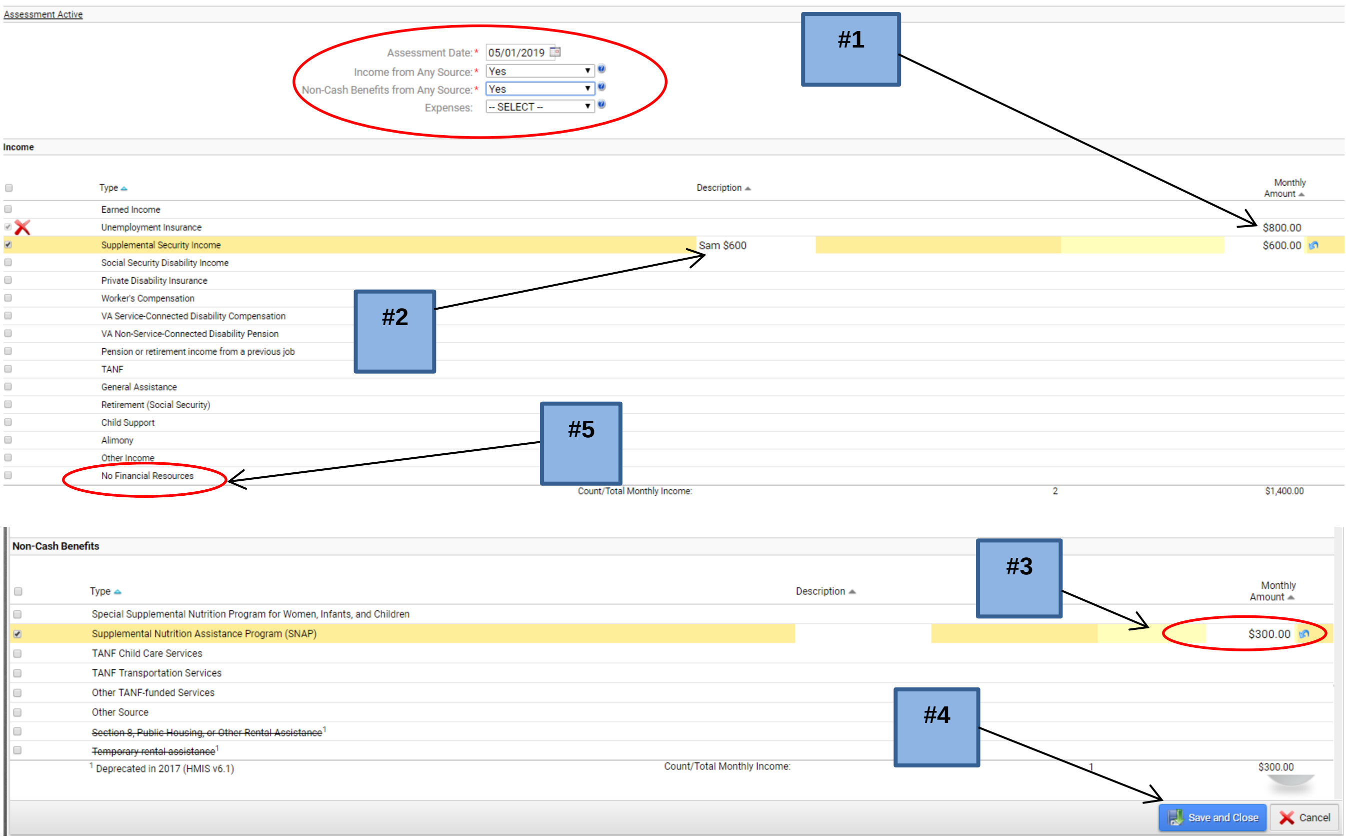
*Note: If domestic violence is reported and you select "Yes" for "Domestic Violence Experience", you will be prompted for more information. If the client reports no, then click "Save" to continue through the workflow.

Financial Assessment



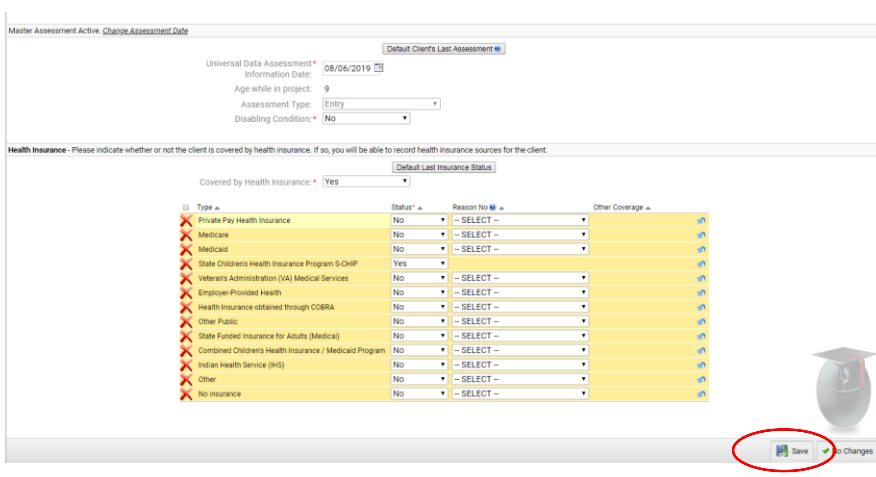
Complete Income and Non-Cash Benefits on all Adults, all children's (under 18) income should be entered into the HOH Income information. You will not complete a separate Financial Assessment for children in the household.

#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**



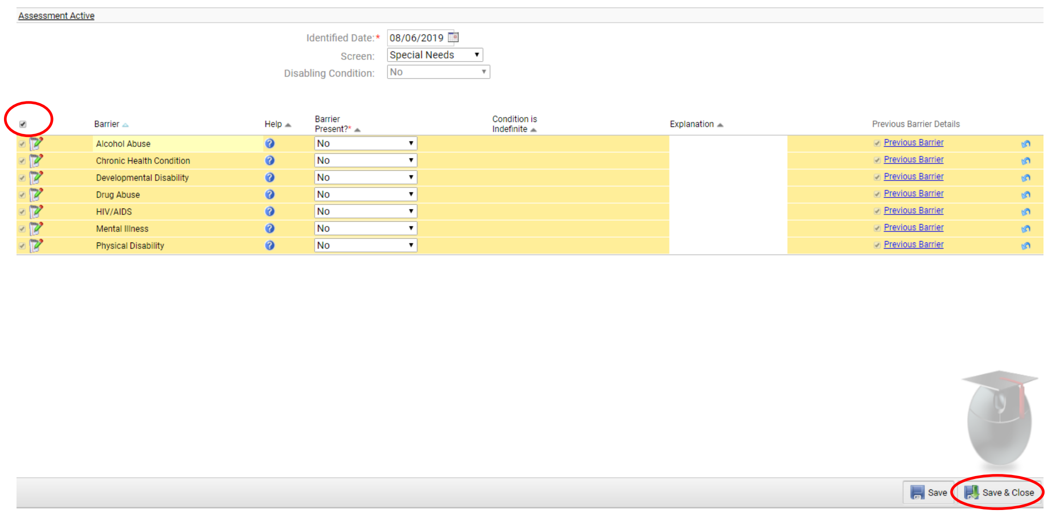
Universal Data Assessment for Child

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.



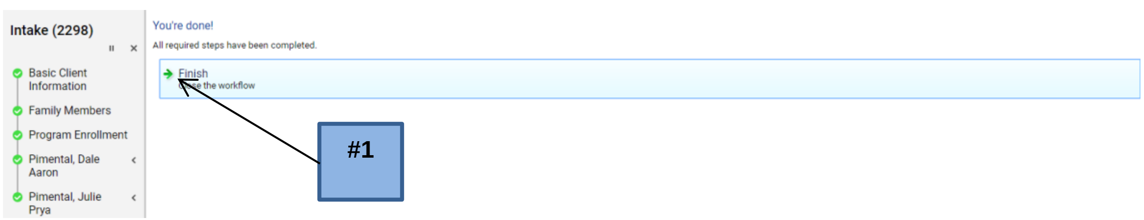
Barriers Assessment for Child

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



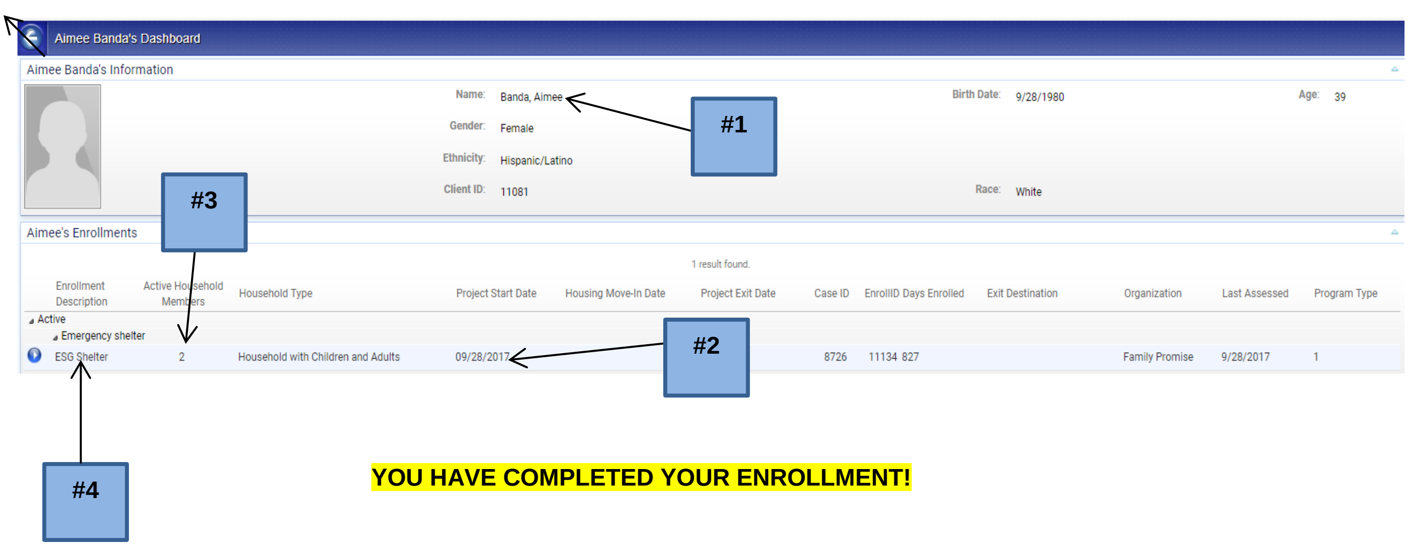
Completing Intake Workflow

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



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

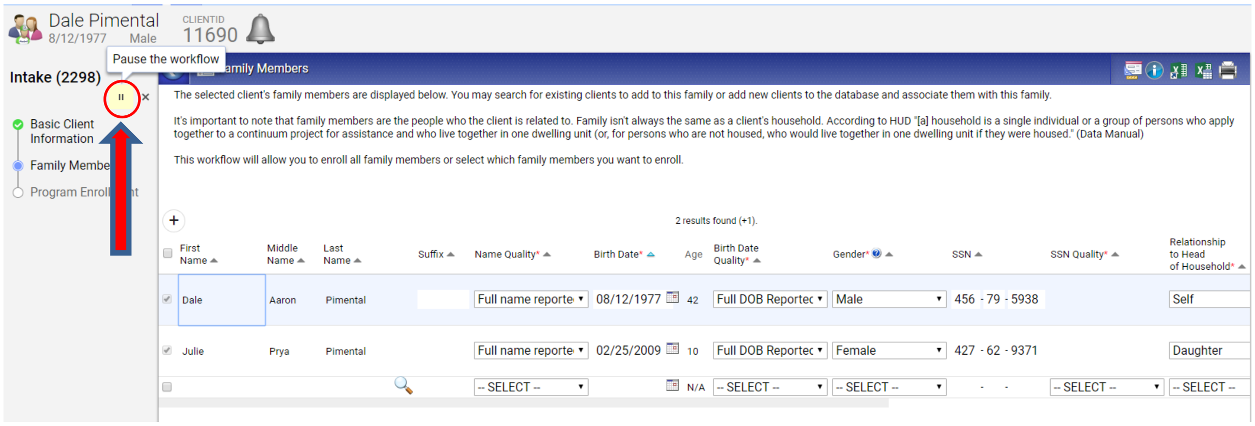
- **#1.** Correct spelling of Name and demographical information
- **#2.** Correct Project Start Date
- **#3.** Correct number of Case Members enrolled
- **#4.** Correct Program



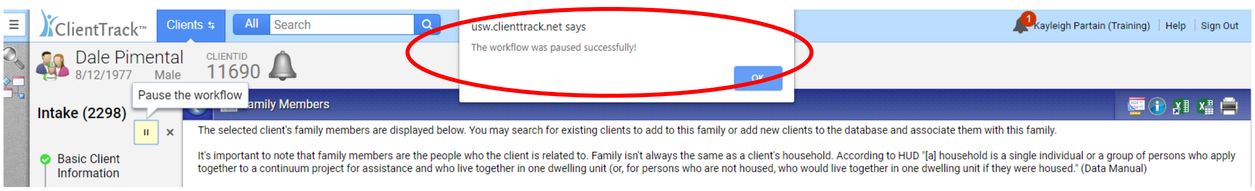
YOU HAVE COMPLETED YOUR ENROLLMENT!

Pausing Workflow

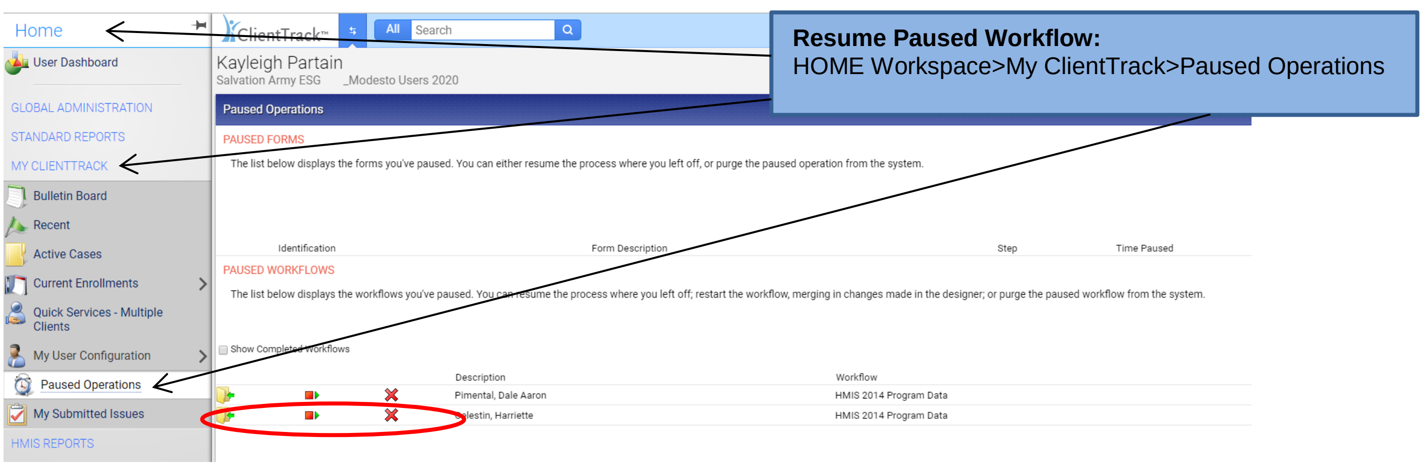
Please pay special attention to the process/workflow you are completing. Should you be interrupted during workflow process, you may "Pause" a workflow by clicking on the pause button located in the upper right-hand corner of the workflow menu beside the black X. The pause feature will allow you to pause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



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



Resume A Paused Workflow




Resume the Workflow


Restart the Workflow


Exit the Workflow

Finding Client ID

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

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

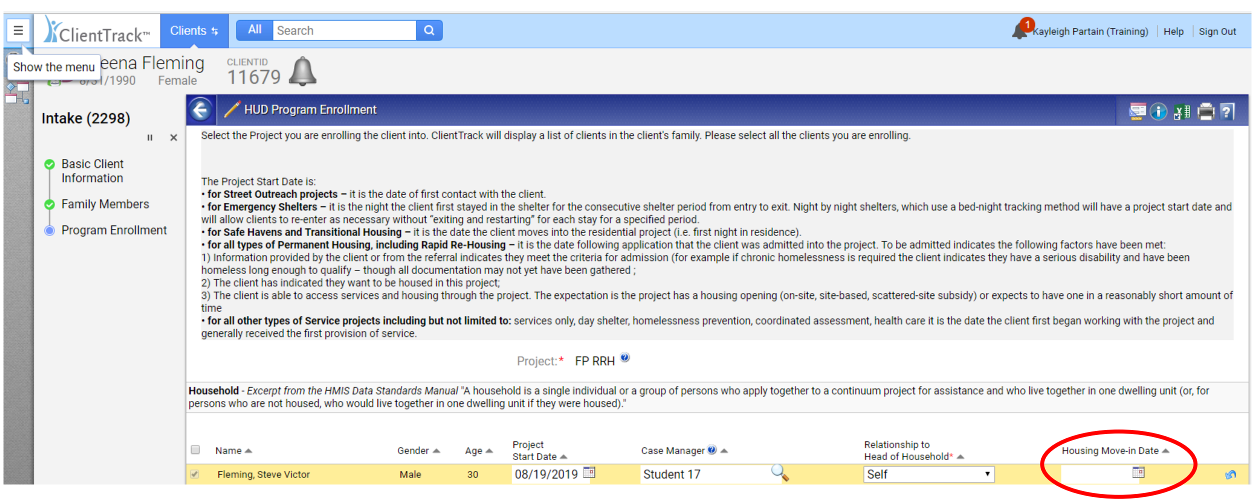
Rapid Re-Housing (RRH) Enrollment

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.

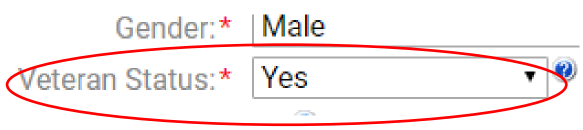
Date of Move-In: When you complete an Update/Annual Assessment and are adding that the household is now in permanent housing, you will be required to add the Date of Move-In. You should use the date the **client actually takes occupancy** of the unit. The Date of Move In should not be projected or added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

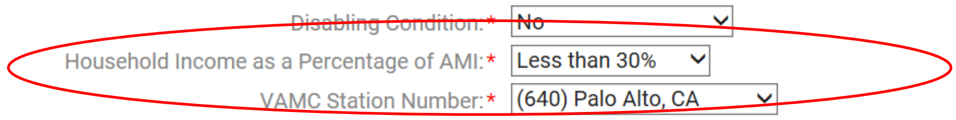


Supportive Services for Veteran Families (SSVF) Enrollment

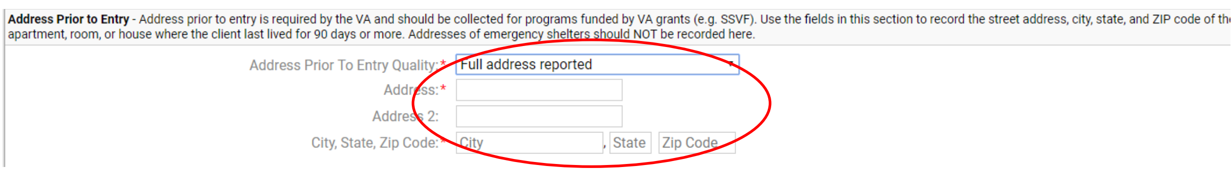
Make Sure the Veteran Status is marked Yes for the HOH



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

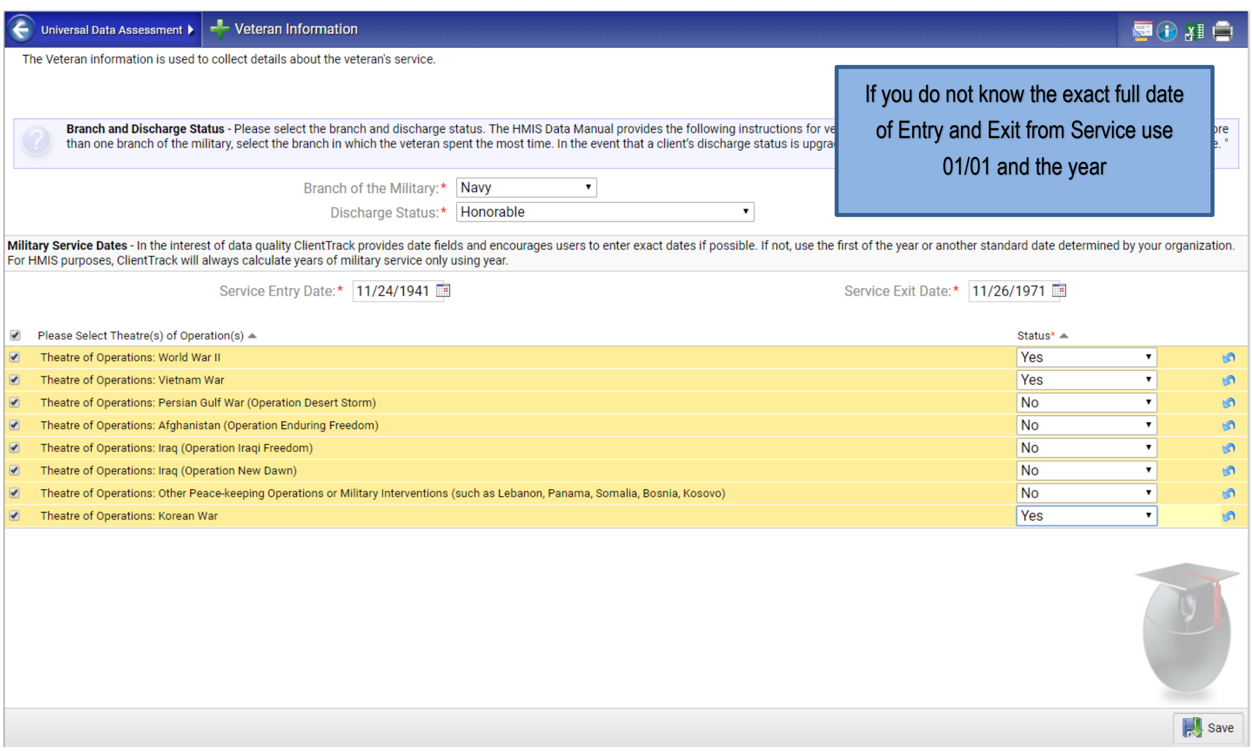


You are required to add the Client's Full Address Prior to Entry

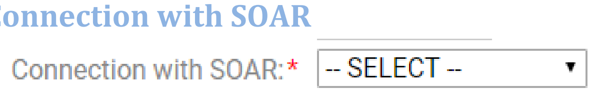


Veteran Assessment

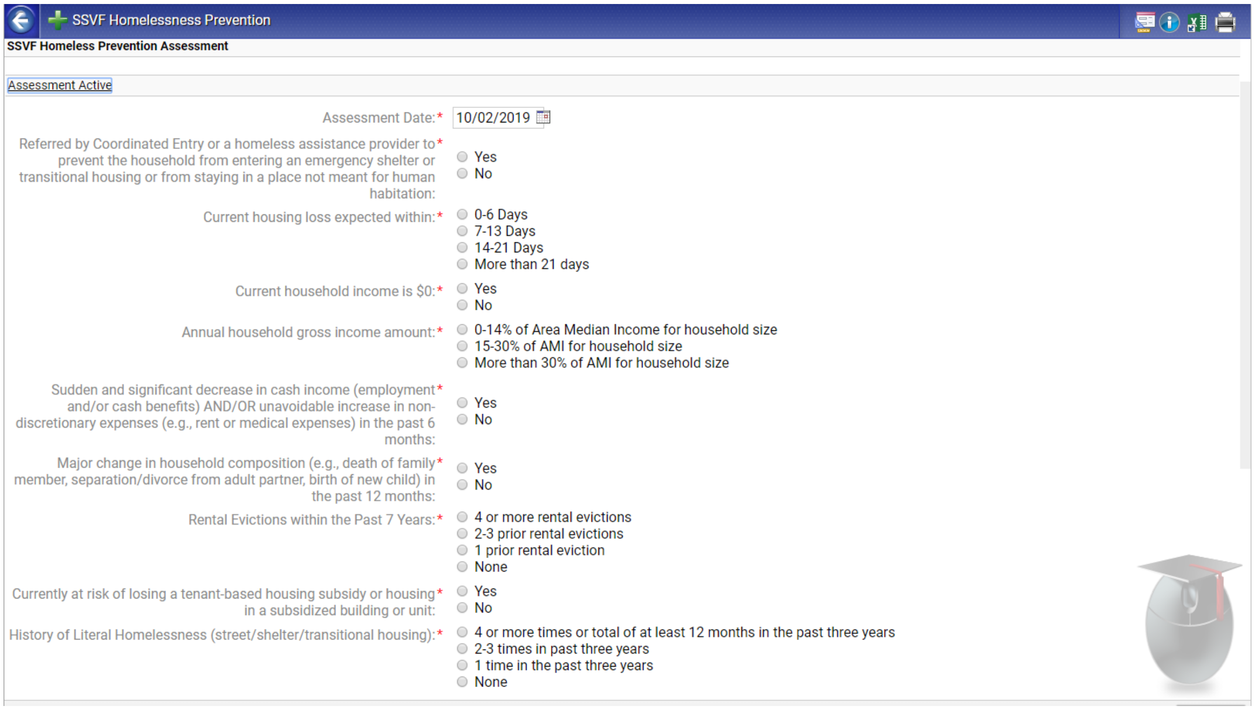
For all Head of Household Veterans



Connection with SOAR



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:* Yes / No

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

Current household income is $0:* Yes / No

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

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

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

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

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

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

Education Assessment:

Highest Grade Completed :* -- SELECT --

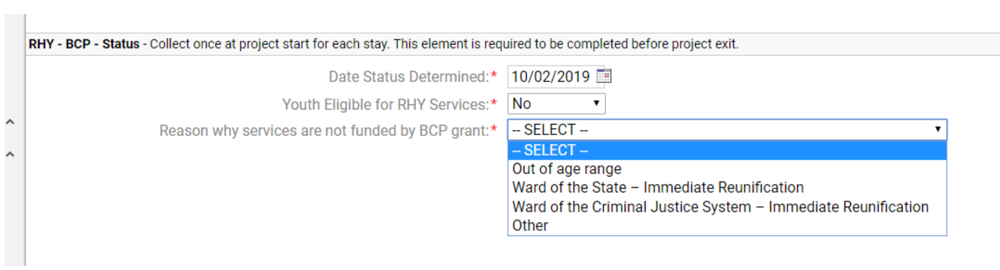
Secondary Education : Associates Degree / Bachelors Degree / Masters Degree / Doctorate Degree / Other graduate/Professional degree / Vocational certification / Certificate of advanced training or skilled artisan

Runaway and Homeless Youth (RHY) Enrollment

Basic Center Program (BCP)

(For Basic Center Program-Emergency Shelter Programs Only)

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



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

Date Status Determined:* 10/02/2019

Youth Eligible for RHY Services:* No

Reason why services are not funded by BCP grant:* -- SELECT -- / Out of age range / Ward of the State – Immediate Reunification / Ward of the Criminal Justice System – Immediate Reunification / Other

If yes, then choose Yes for Runaway Youth and Save

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

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

Employment Assessment:

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

Assessment Date:* 10/02/2019
Employed?* No
Why Not Employed :* -- SELECT --

- -- SELECT --
- Looking for work
- Unable to work
- Not looking for work

Education Assessment:

Assessment Date:* 09/13/2019
Highest Grade Completed :* No School Completed
School Status:* Attending school regularly

Secondary Education :

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

Health Assessment:

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

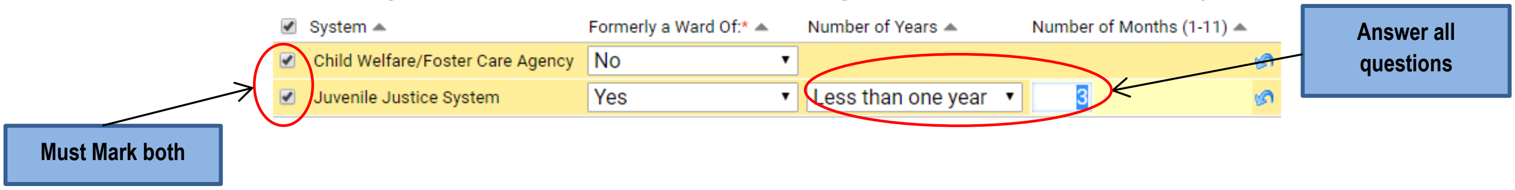
*Note: If pregnant, Pregnancy Due Date must be entered.

RHY Entry Assessment:

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

Critical Issue	Status*
Unemployment - Family member	Yes No
Mental Health Issues - Family member	Yes No
Physical Disability - Family member	Yes No
Alcohol or other drug abuse - Family member	Yes No
Insufficient Income to support youth - Family member	Yes No
Incarcerated Parent of Youth	Yes No

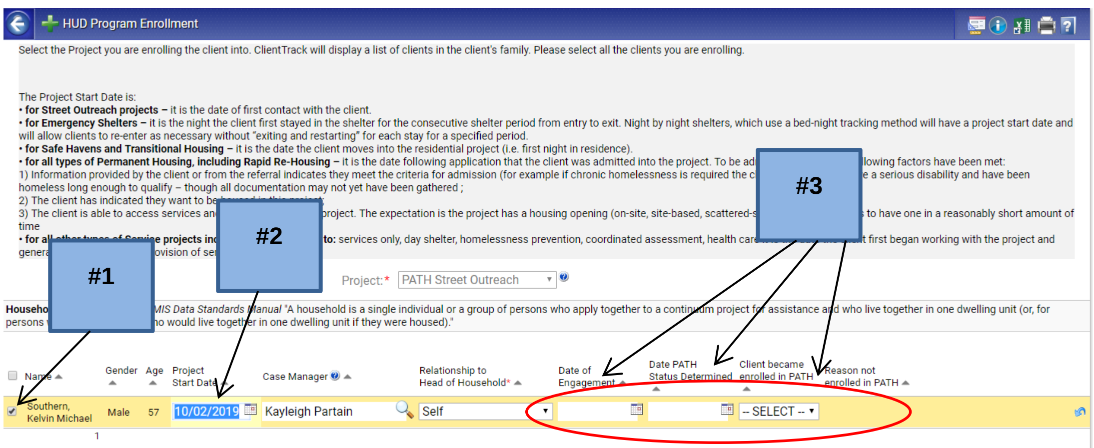
RHY Entry Assessment Juvenile Justice System and Child Welfare/Foster Care



Projects for Assistance in Transition from Homelessness (PATH) Enrollment

PATH Project Enrollment

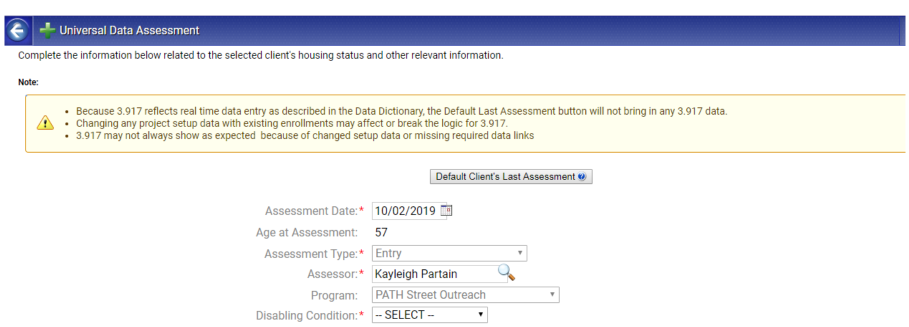
#1. Click on the box to the left of all persons you want to enroll in this program
#2. The date will default to the date of entry, so change if needed by clicking on the date
#3. Make sure you add the Date of Engagement, Date PATH Status Determined, Client became enrolled in PATH, and if NO, Reason not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



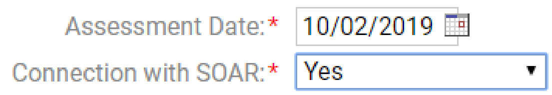
PATH Universal Data Assessment

#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.

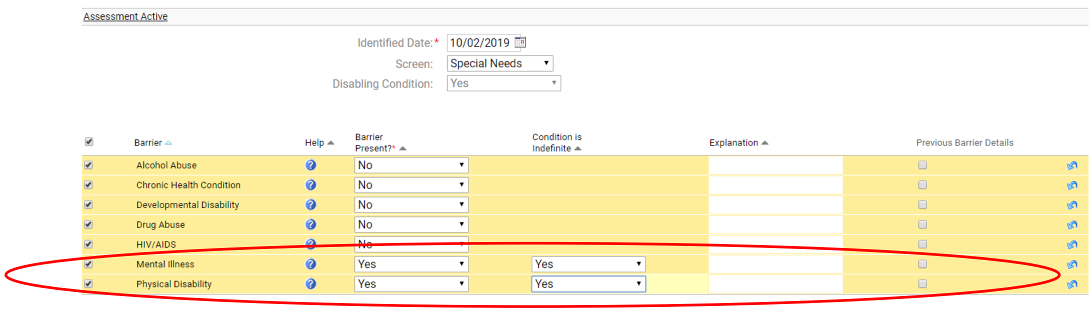


SOAR Connection (SOAR: SSI/SSDI Outreach, Access, and Recovery)

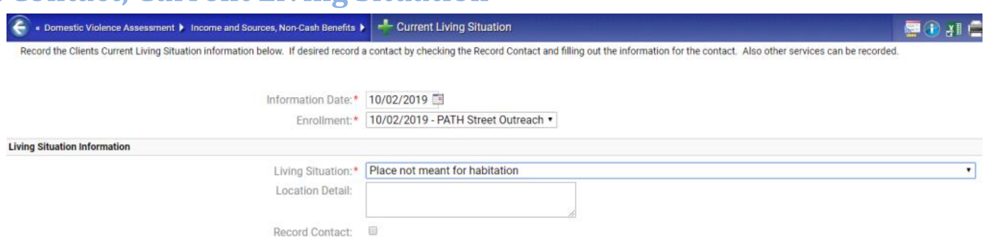


PATH Barriers Assessment

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



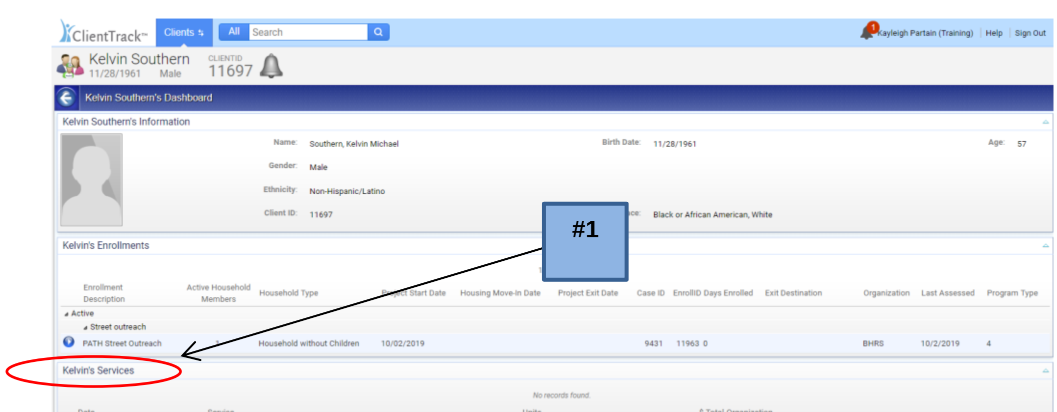
PATH Contact, Current Living Situation



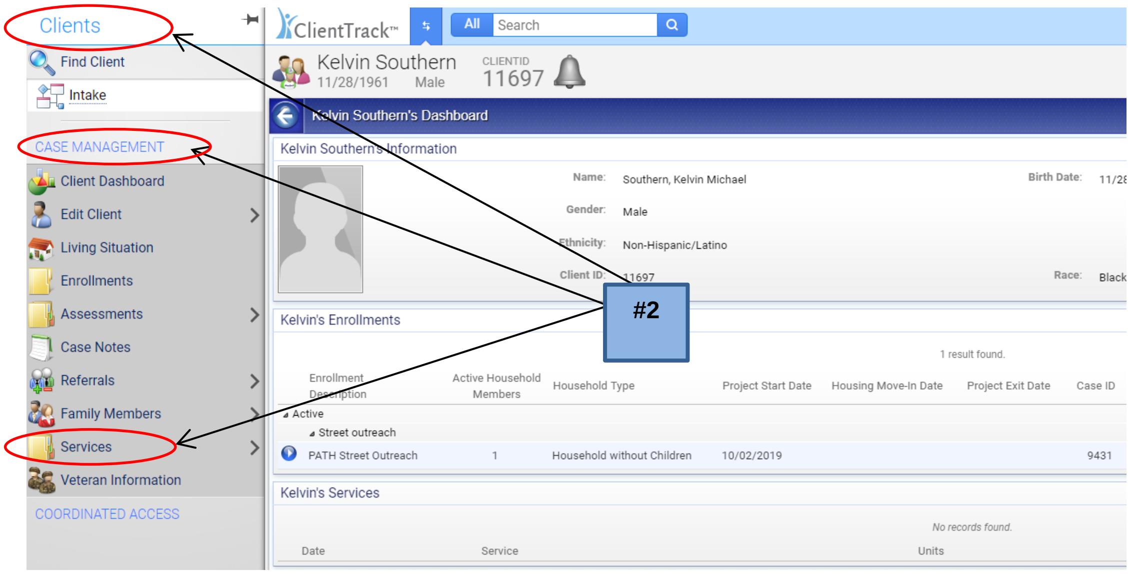
Adding Services

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

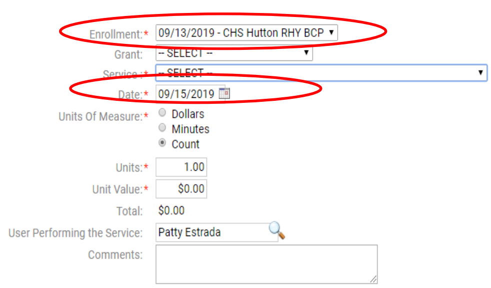
#1. From Client Workspace, on Client Dashboard click **Client's Services**

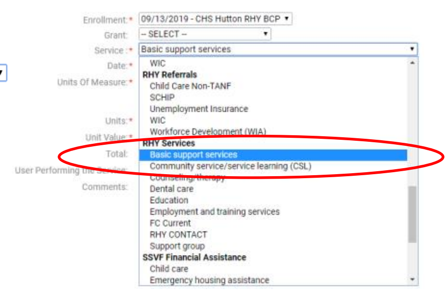


#2. From Client Workspace > Open **Menu Navigation**> **Case Management** > **Services**

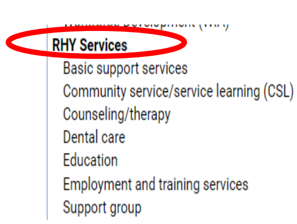


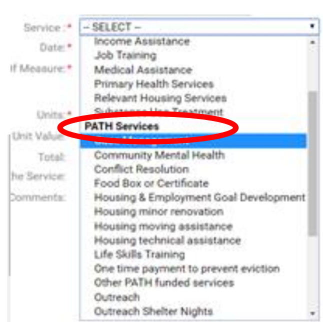
#3 Click Add New, then Choose Enrollment and Service

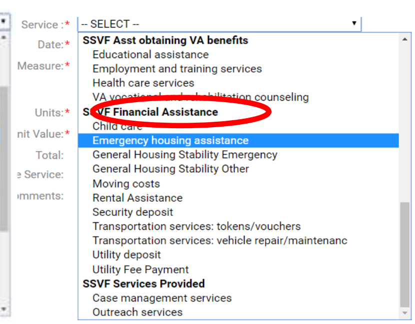




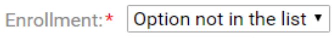
Make sure to scroll down to view the services under your correct project type

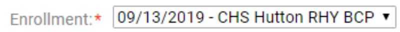


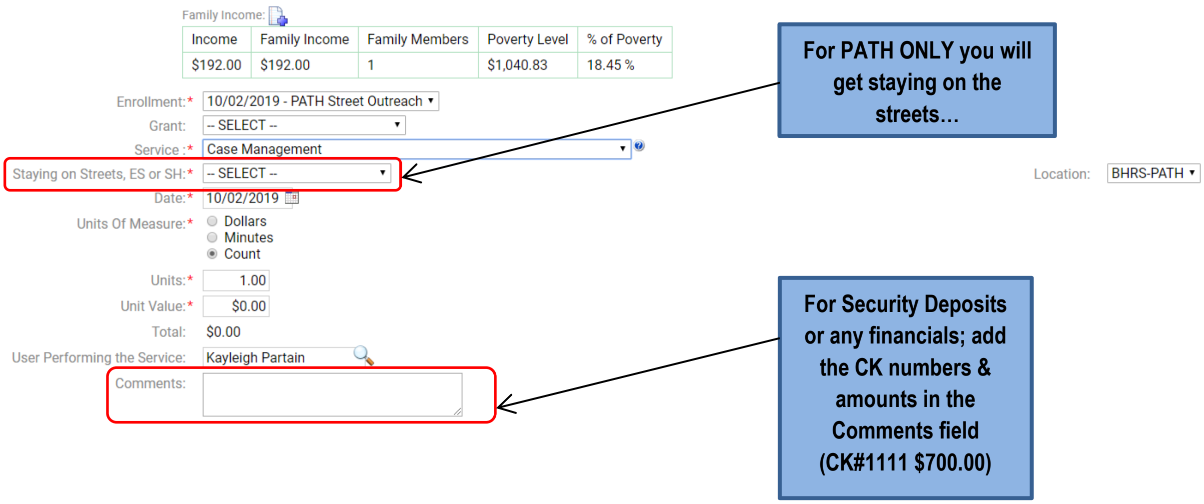




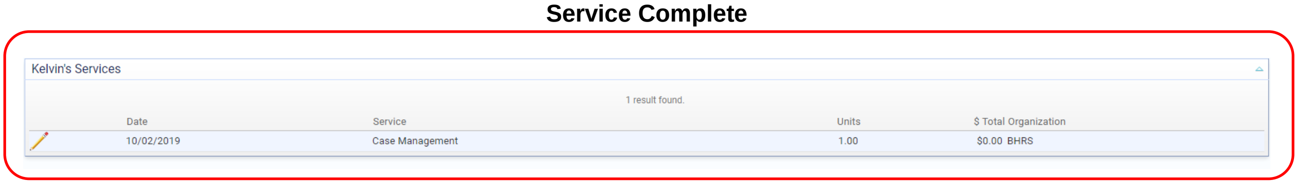
The date will default to the date you are entering the service, make sure you change if needed. If the enrollment is already closed, you will not see an option under Enrollment, make sure you change the service date to a date during the active enrollment or you will get “Option not in the list” and the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

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





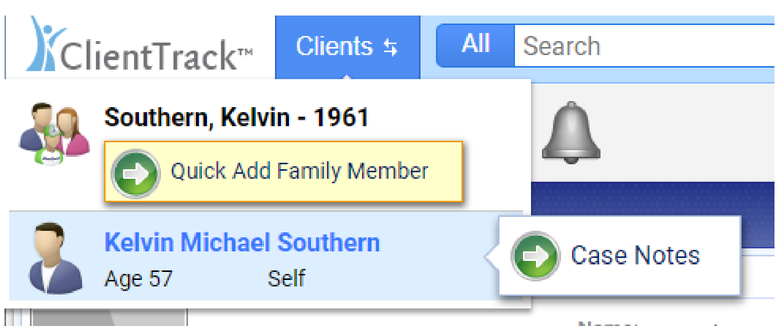
Service Complete

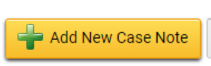


For Quick Services: >Clients>Case Management>Services>Quick Services

Adding Case Notes

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

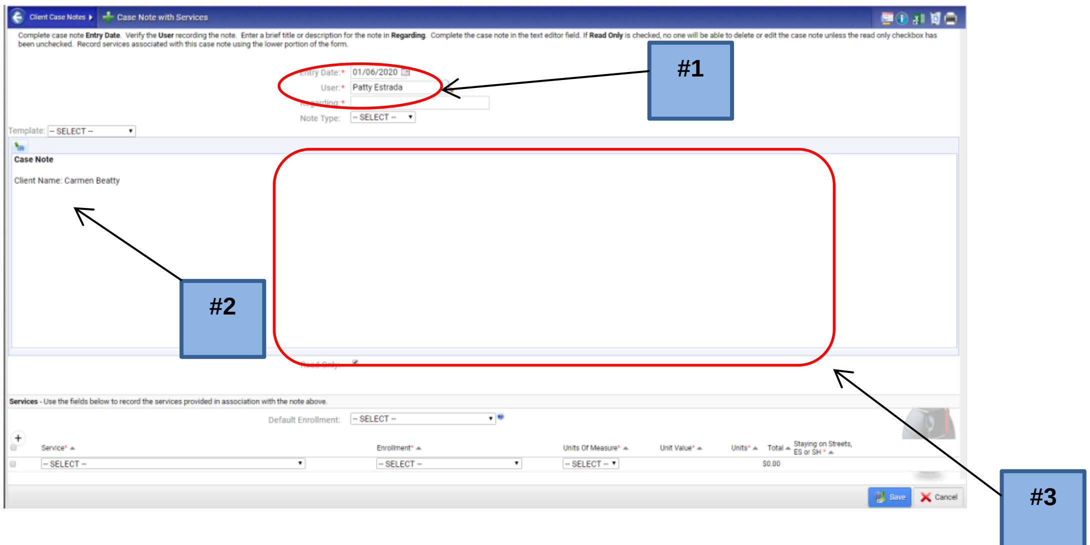


Add New Case Note 

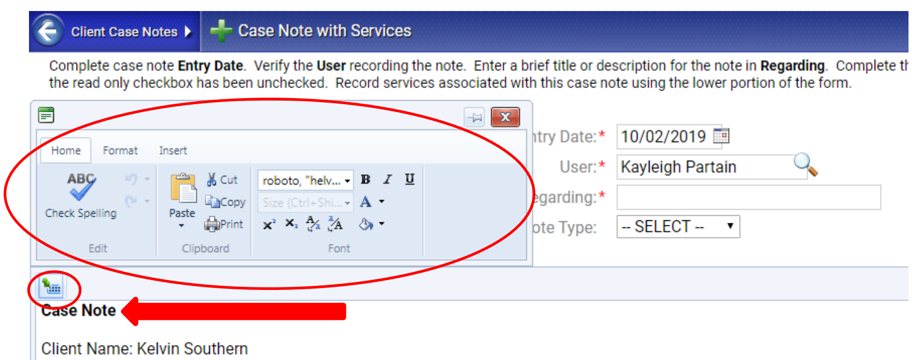
#1. Complete the Entry Date and Regarding Sections

#2. The Client Name is defaulted

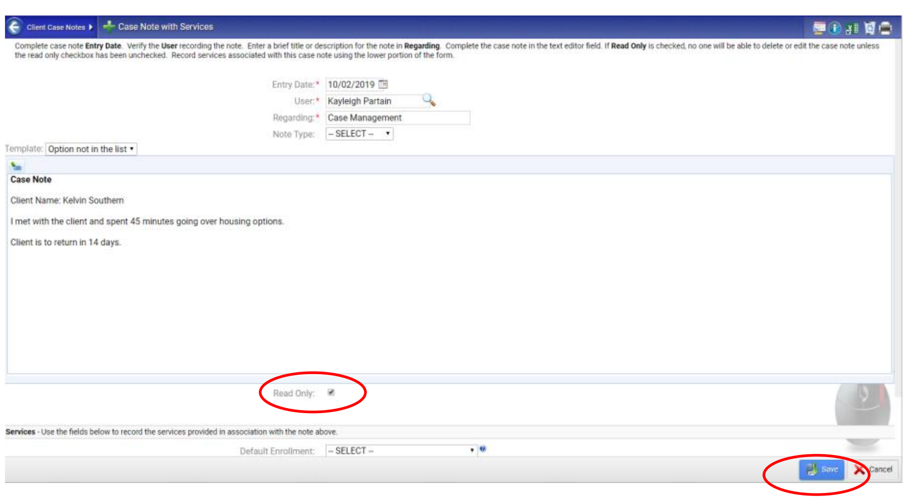
#3. You can copy and paste in the body of the note



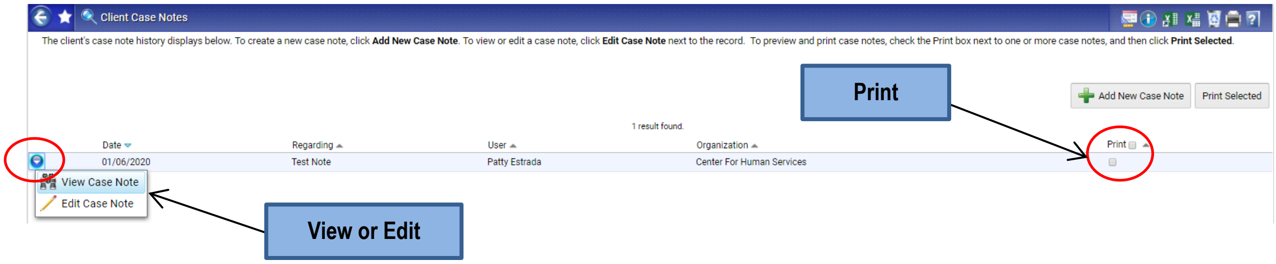
Click on the keyboard and it will give you options like those in Word



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



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

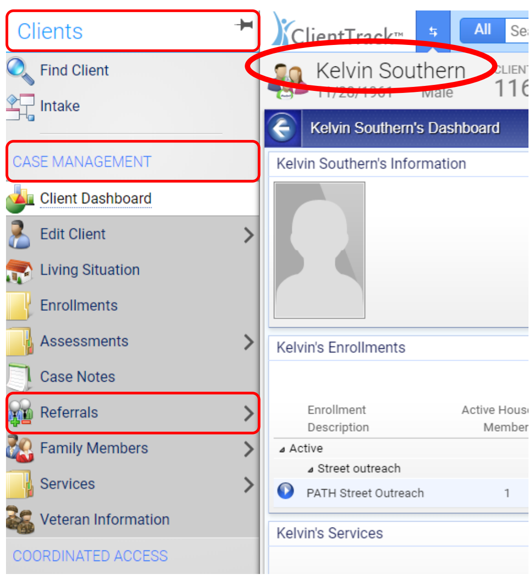


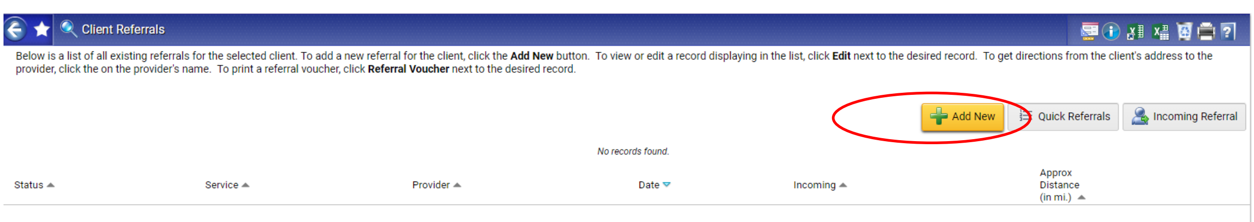
***Note:** Any case notes created for a client are restricted to case managers within your organization. No one outside of your agency can view your case notes.

Adding Referrals

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

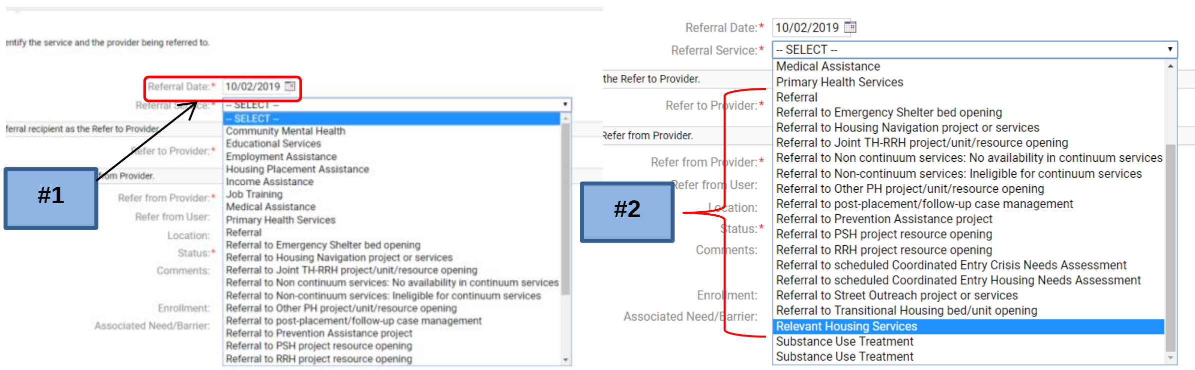
#1. Client is showing in the header>menu navigation tab>Case Management>Referrals





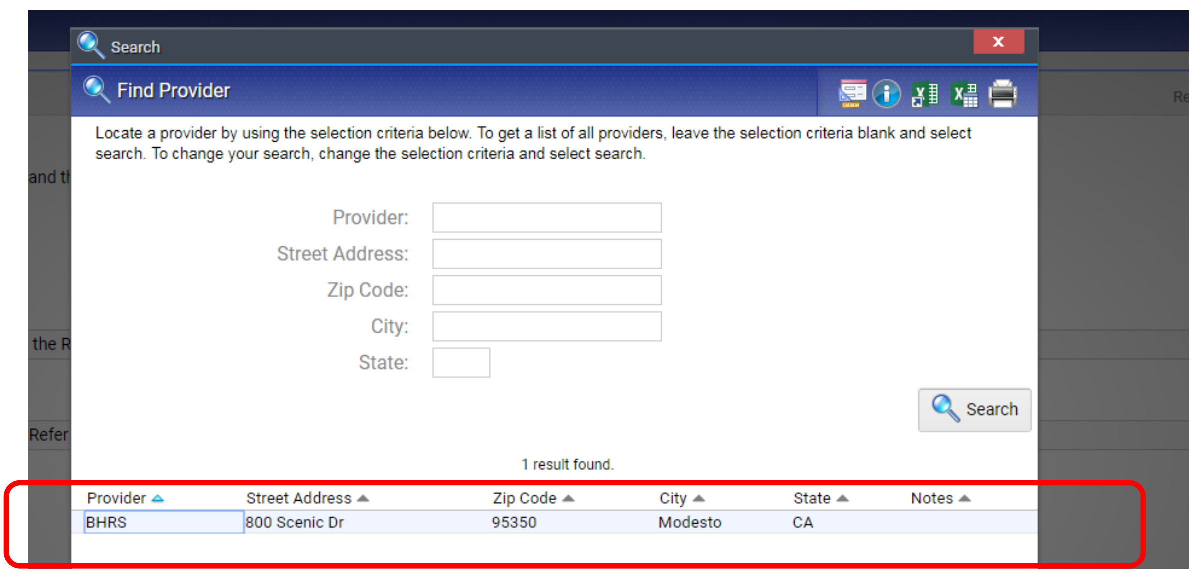
On Referrals screen click Add New

#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 Servicces that are set for your agency in the drop down list.

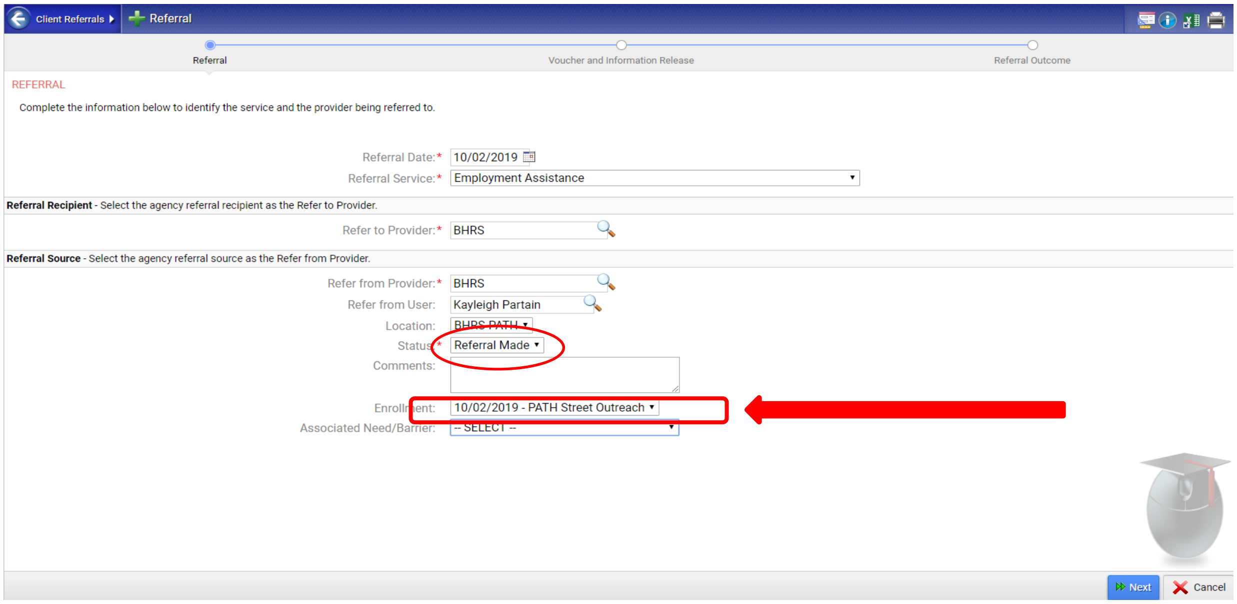


Click on the Magnifying Glass for “Refer to Provider

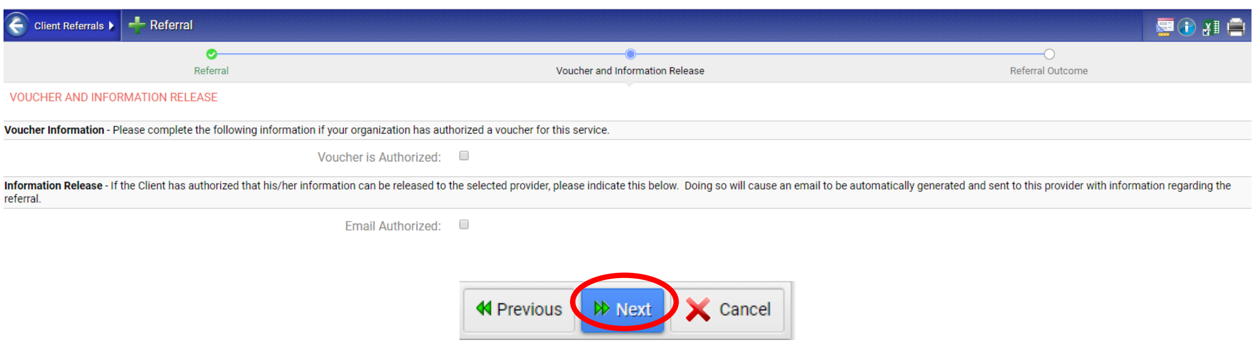
Only Providers who provide that service will be shown, click on the one you want to refer the client to.



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

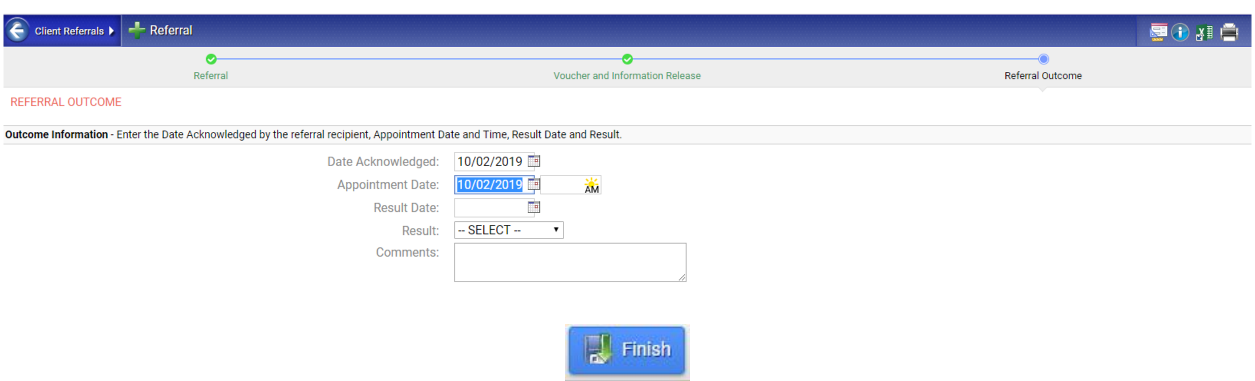


Leave the Voucher and Information Release blank. Do not check the boxes.



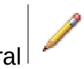
Referral Outcomes

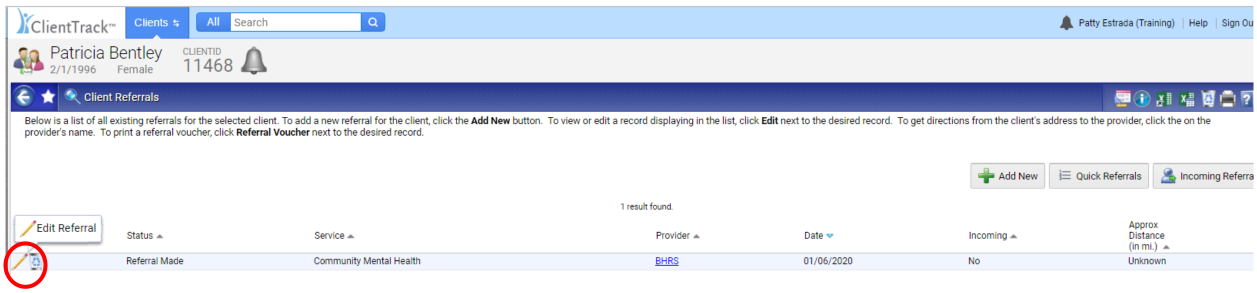
For RHY: You can set the outcome as Information Only, you may also add any comments.



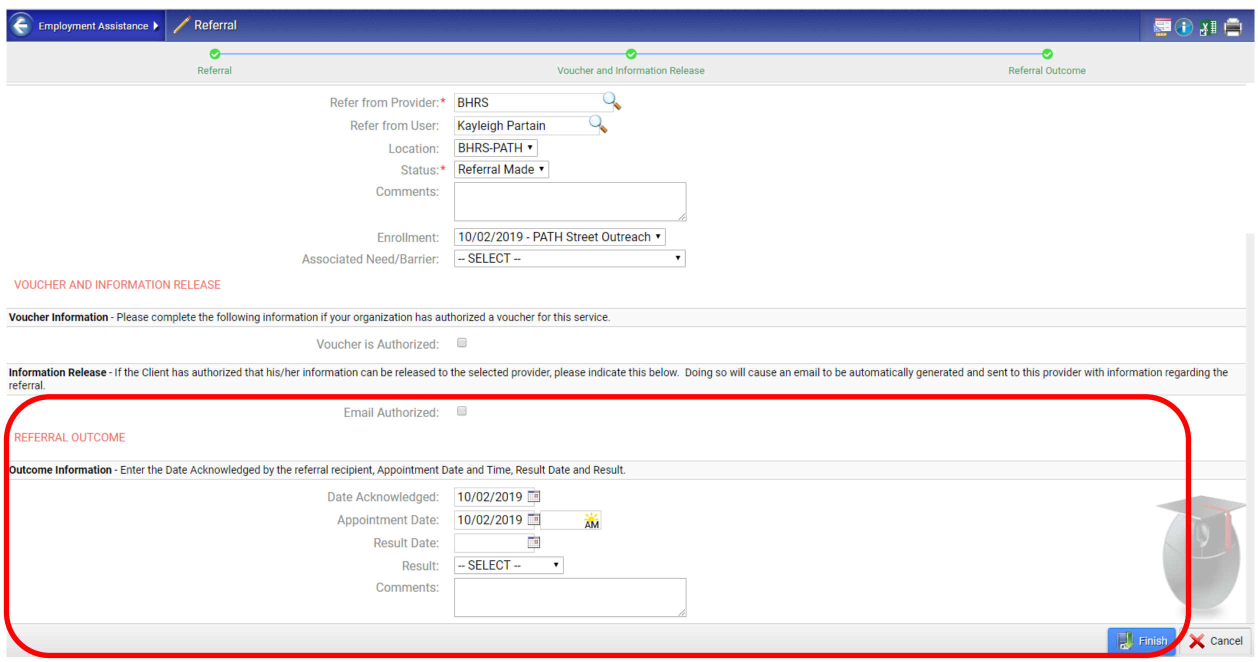
For PATH: You must make sure all referrals for PATH have outcomes; this is your guide for PATH reporting purposes.

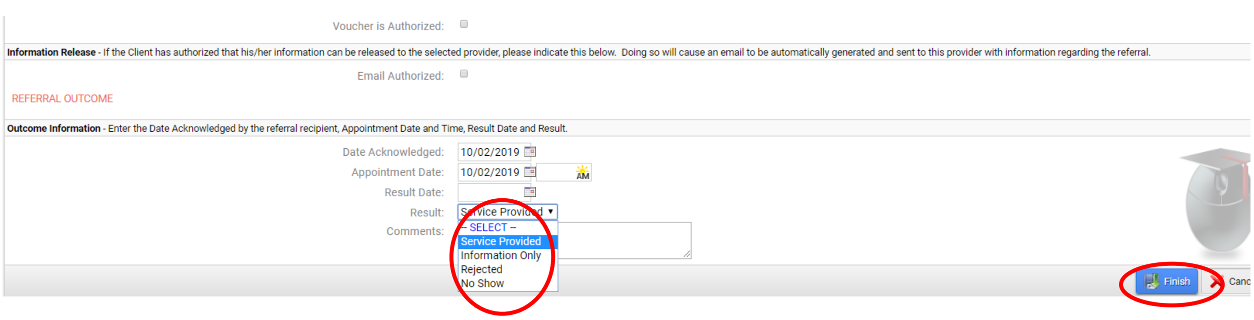
Once a Referral is made, you can go back and **Edit the Outcome** at a later time by selecting Edit Referral





Scroll down and update the data on outcomes and Finish



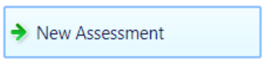


Update/Annual Assessment

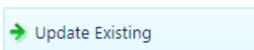
Update: These data elements represent information that is either collected a multiple points during project enrollment in order to track changes over time (e.g., Income and Sources) or is entered to record project activities as they occur (e.g., Services Provided) The frequency with which data must be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

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

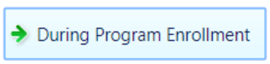
HUD-funded programs and for HUD reporting purposes, the “annual assessment” is **MANDATORY.**



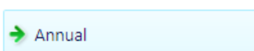
Used for “New” Update or “New” Annual Assessment



Used for updating a previous During Program Enrollment



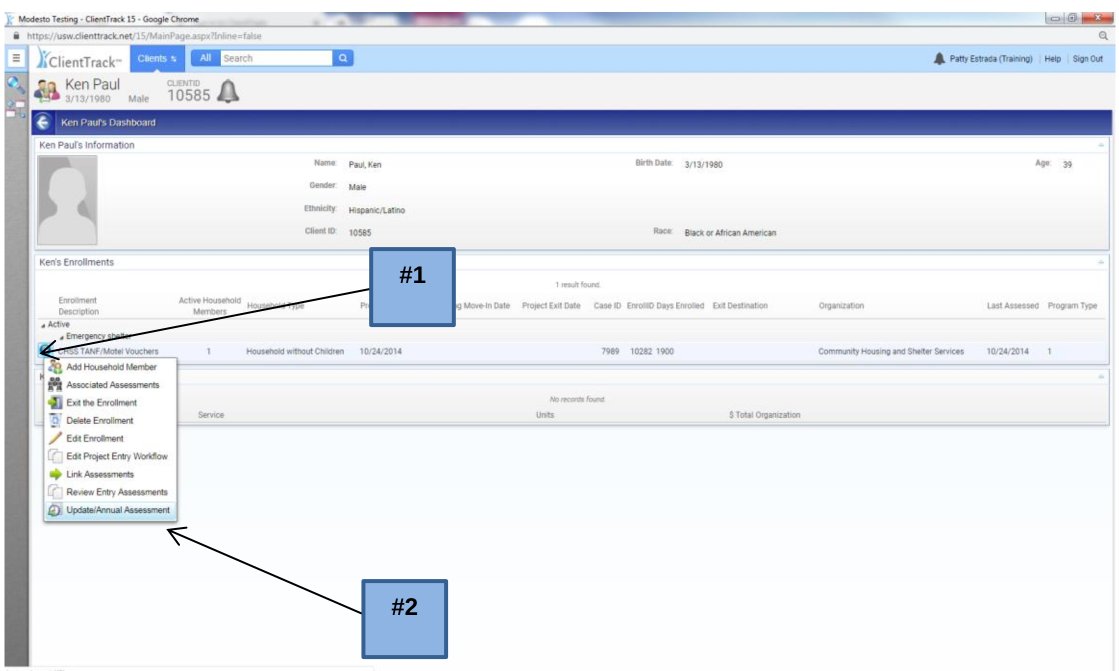
Used for updating Client’s Barriers, DV, Income & Sources



Used to perform HUD Mandatory Annual Assessment

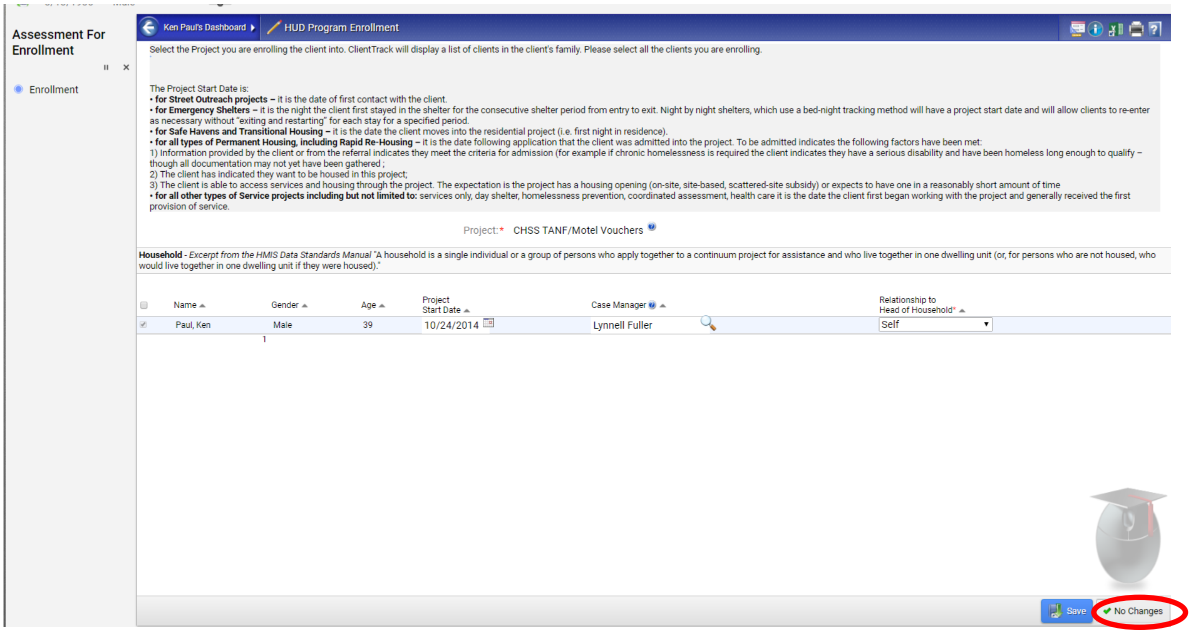
Performing Updates (Update)

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

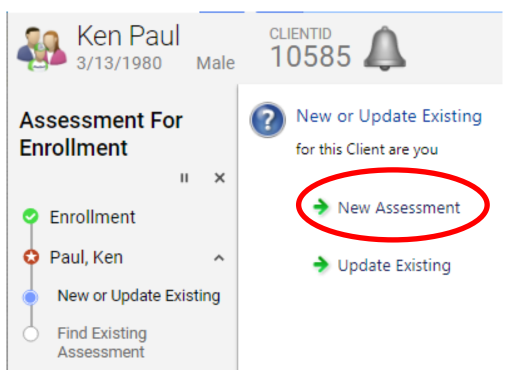


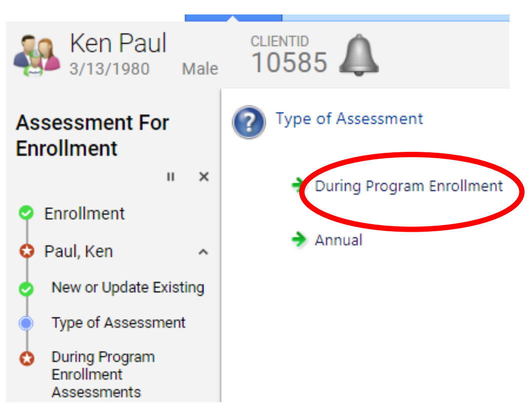
Enrollment Assessment

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



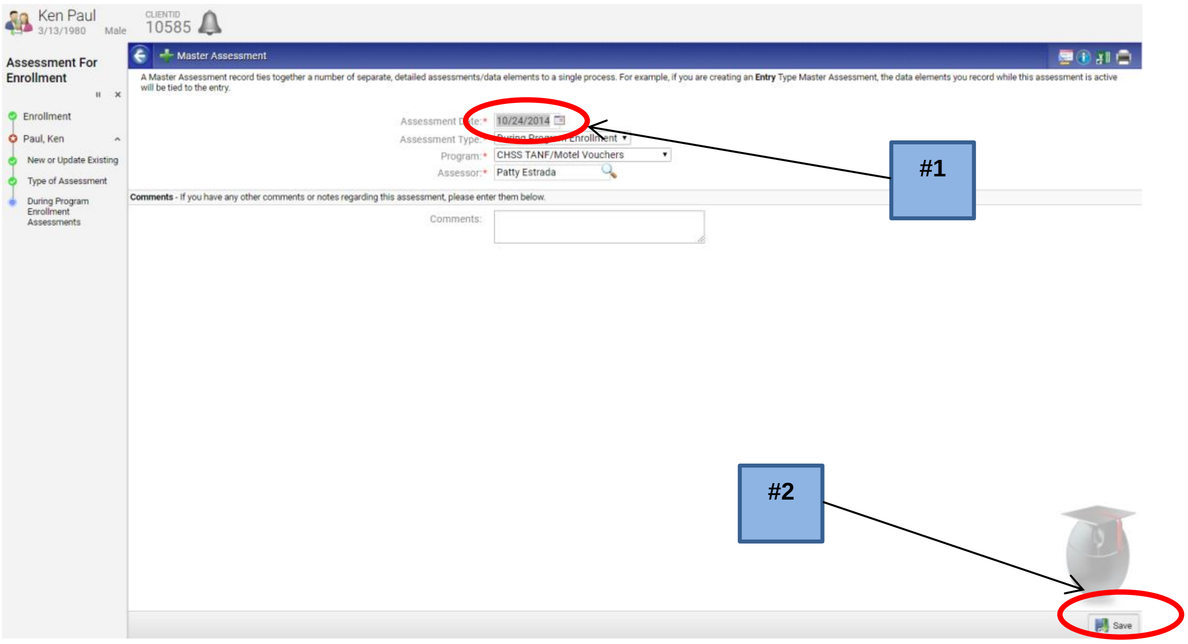
Performing During Program Enrollment (Barrier Changes), Select New Assessment then select During Program Enrollment.





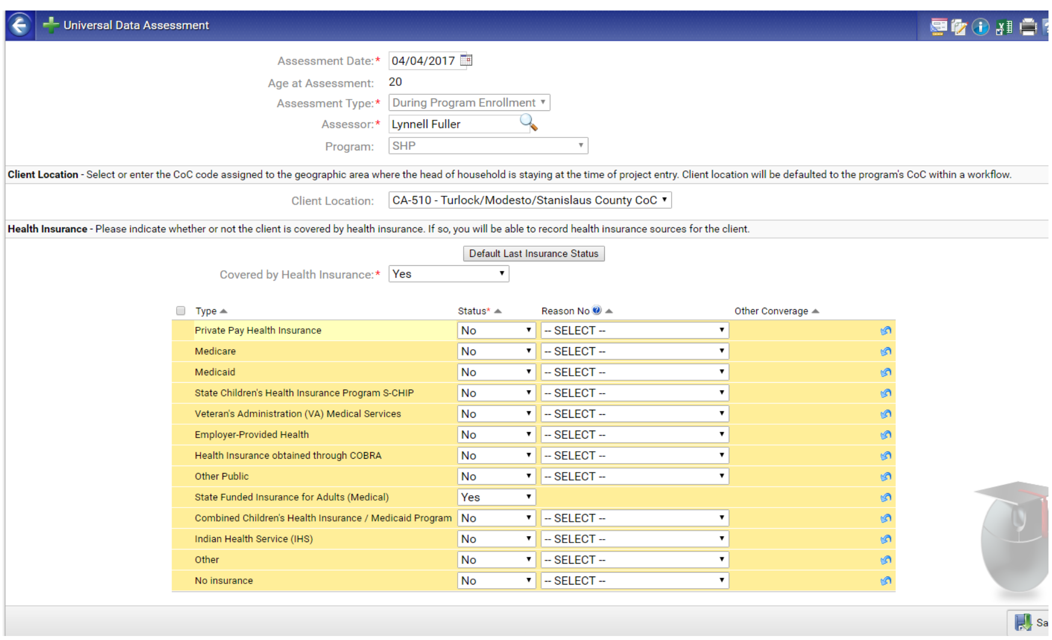
Master Assesement

#1. Verify the Assesment Date
#2. Save

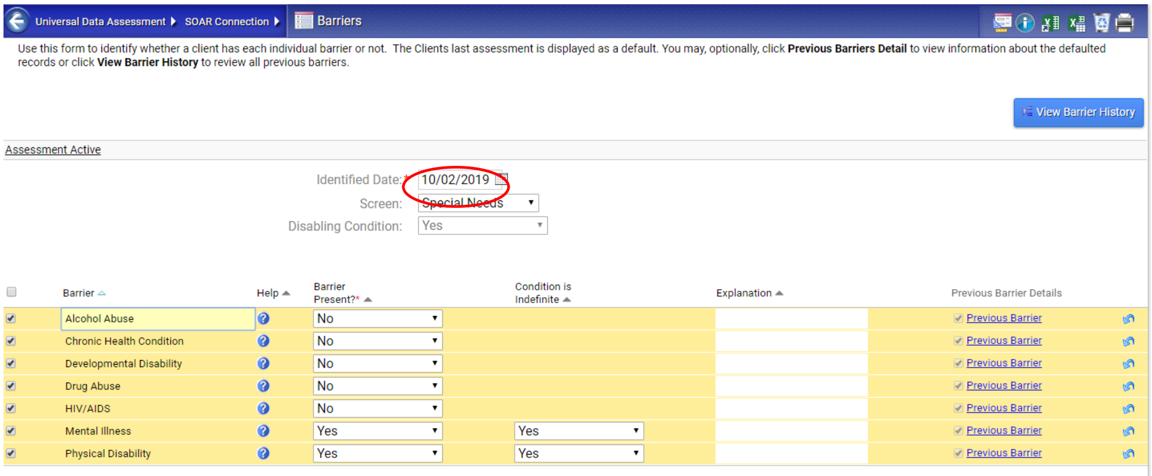


Universal Data Assessment

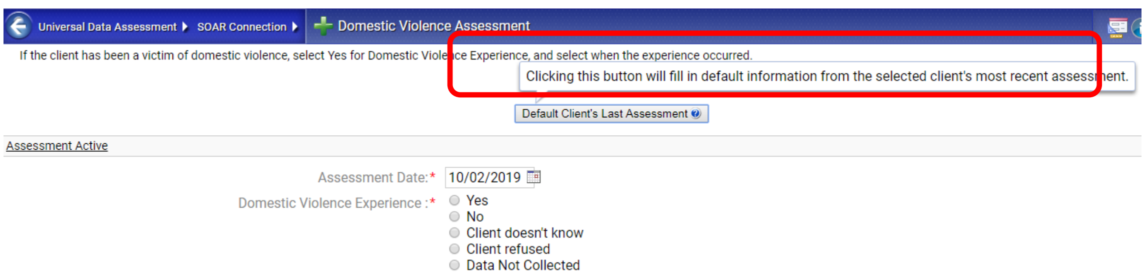
You can default to the last Insurance Status if there have been no changes and select Save



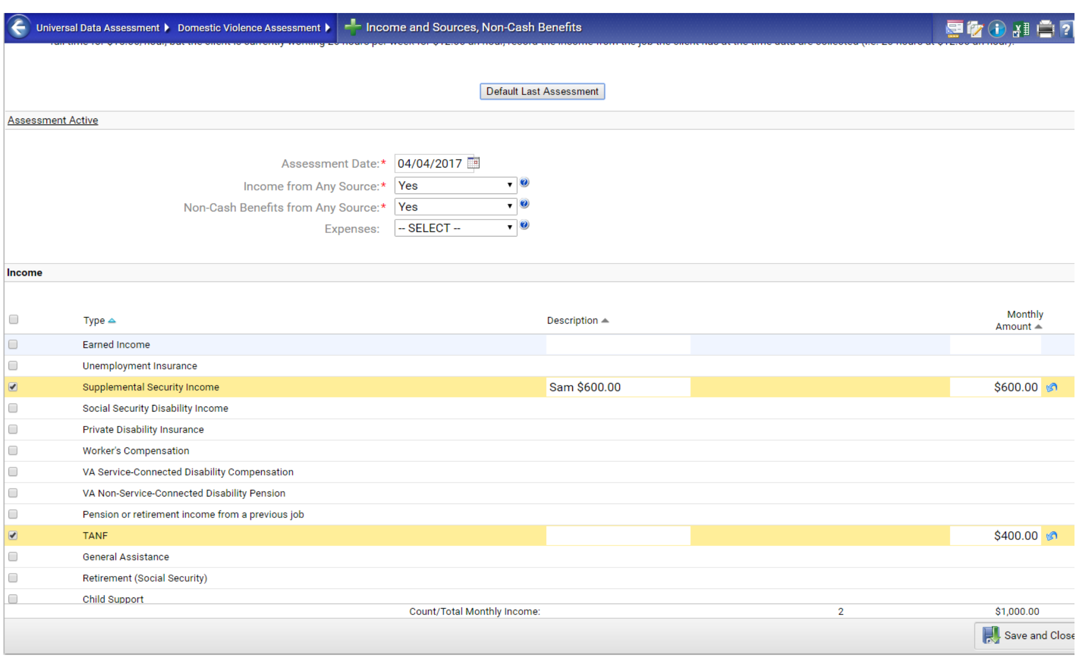
Barriers Assessment: will be completed; you can Save or make changes



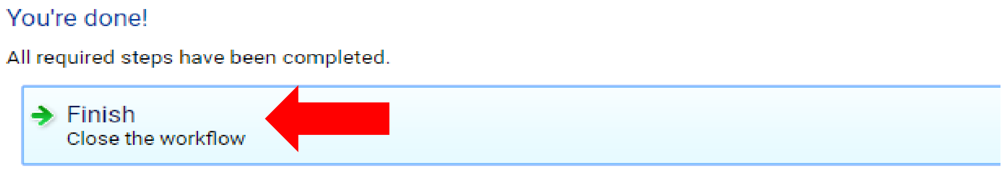
Domestic Violence Assessment: you can also Default to Last Assessment if there has been no change



Income Sources & Non-Cash Benefits

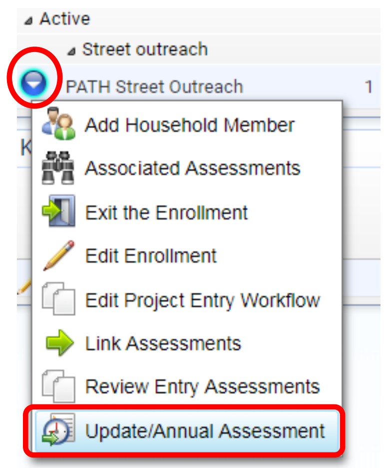


Make sure to click on the **Finish**, **Close the Workflow**

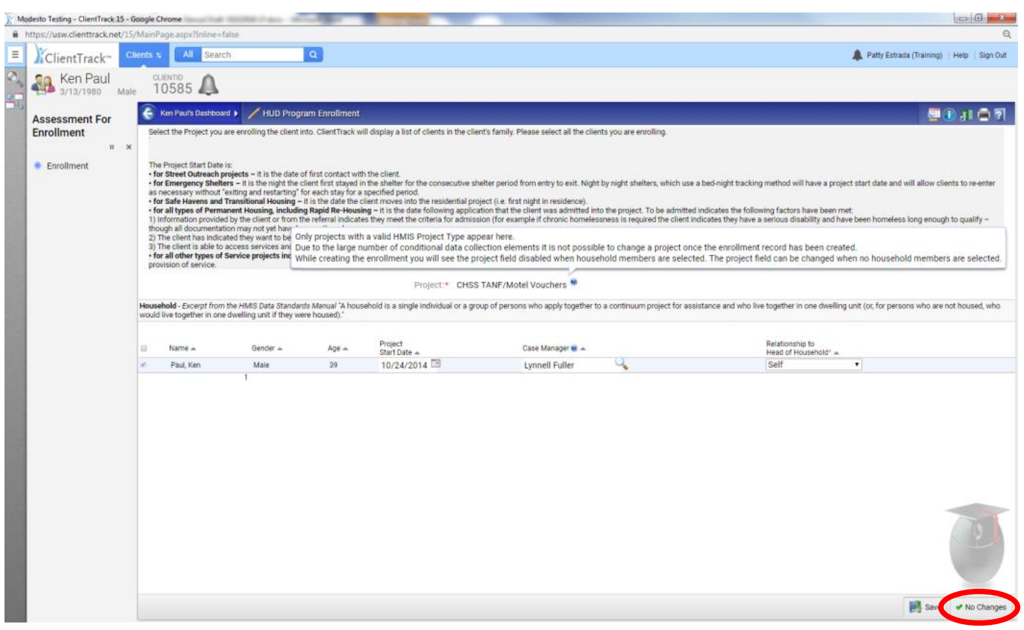


Performing Annual Assessment

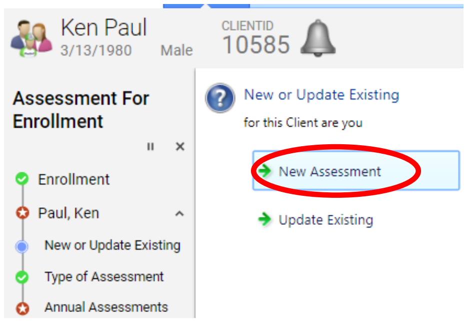
Start at the Client Dashboard, click on the **Blue Action Arrow** to the Enrollment you are performing the Annual Assessment on, and choose **Update/Annual Assessment**

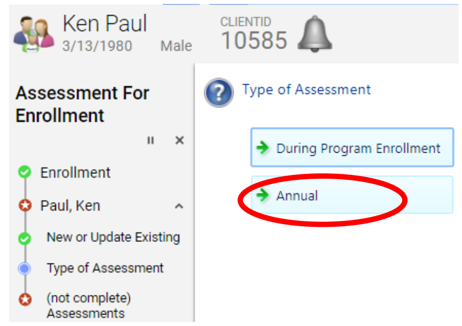


Enrollment Assessment: No changes with the Enrollment

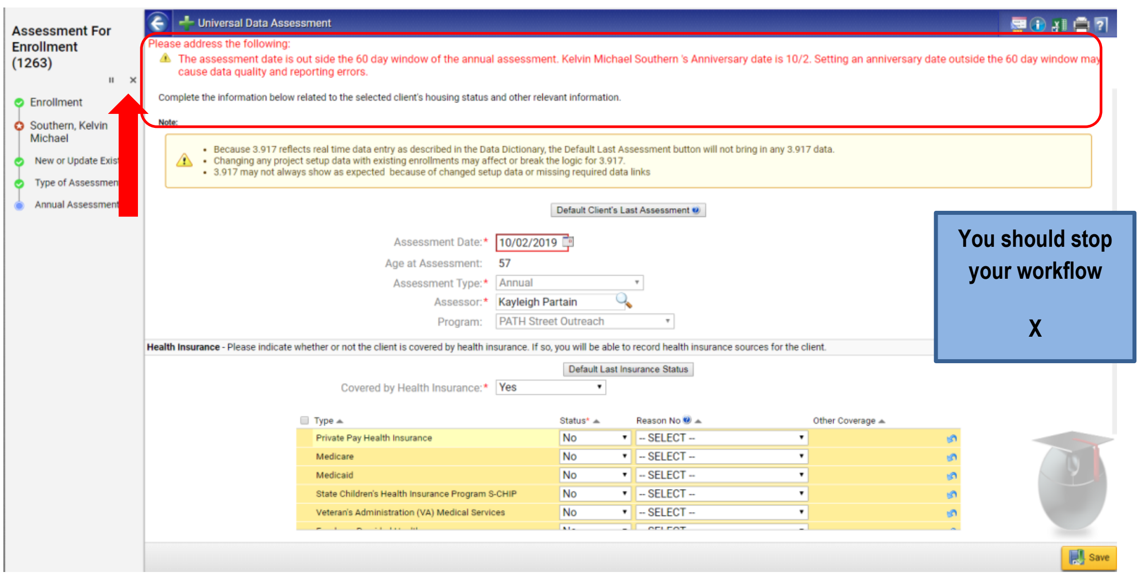


You will be asked New or Update Existing and Type of Assessment: Choose **New Assessment** and **Annual**



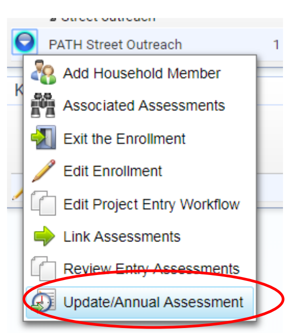


The system will give you the warning: If the assessment date is outside the 60 day window of the annual assessment. Kelvin Michael Southern's Anniversary date is 10/2. Setting an anniversary date outside the 60 day window may cause data quality and reporting errors.

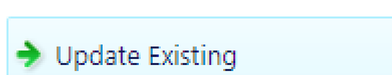


Updating Existing Assessment

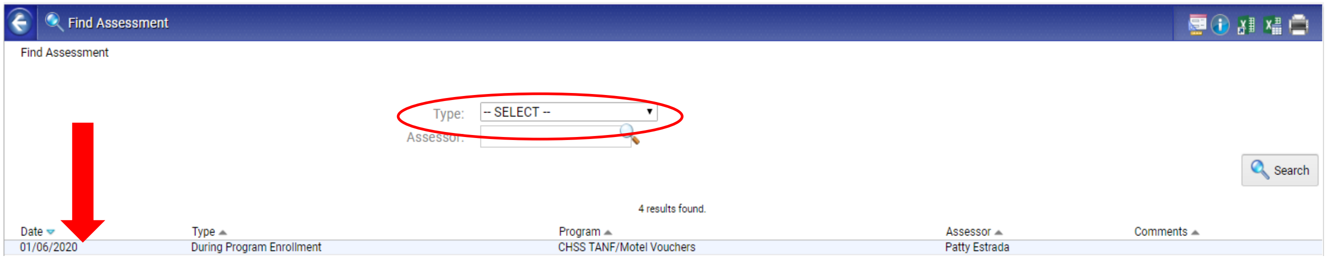
Go through the same process starting at the Blue Action Arrow



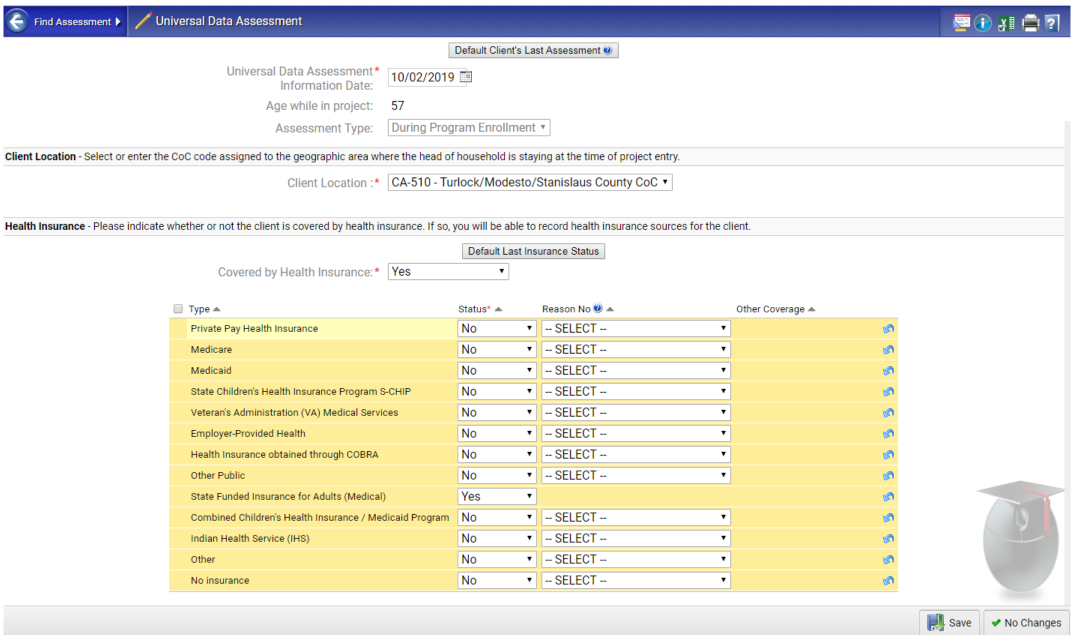
Then Select



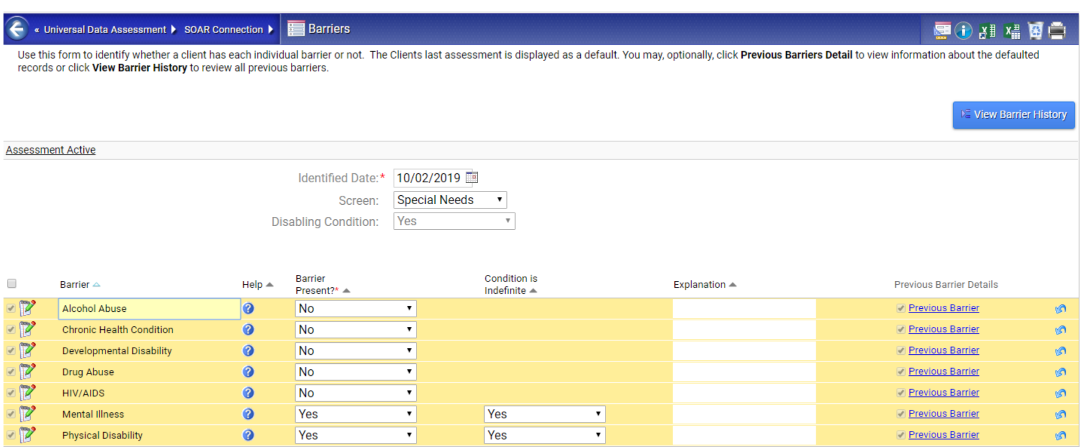
You can Change the Type of Assessment you are looking for then Search or if correct is showing click on it.



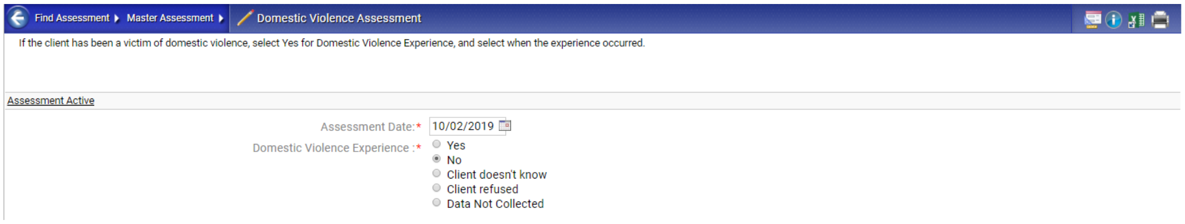
Universal Assessment: You will be taken through the entire workflow process where you can make the change or continue moving forward



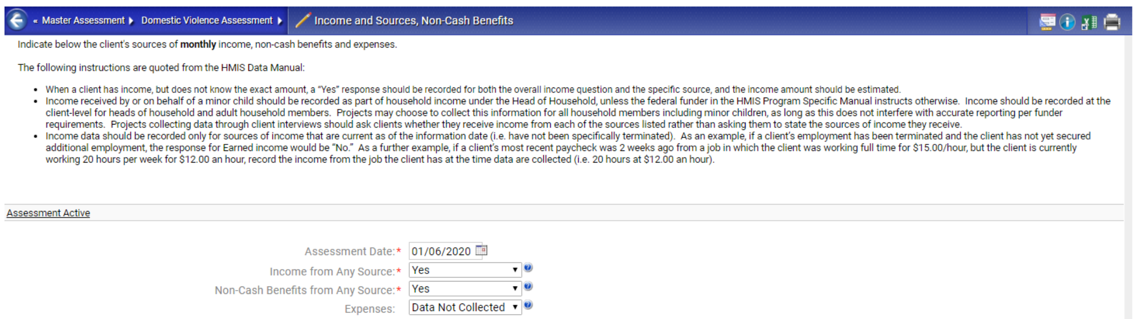
Barriers



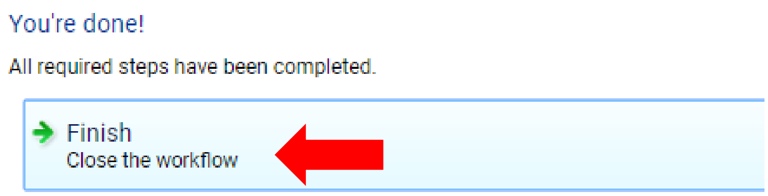
Domestic Violence



Income Sources & Non-Cash Benefits

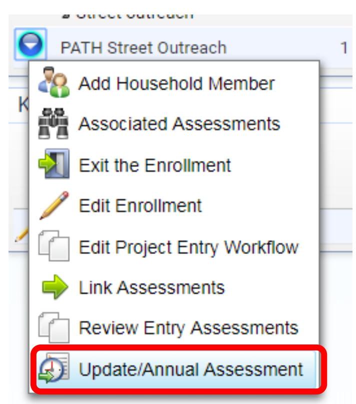


Make sure to click on the **Finish**, **Close the Workflow**

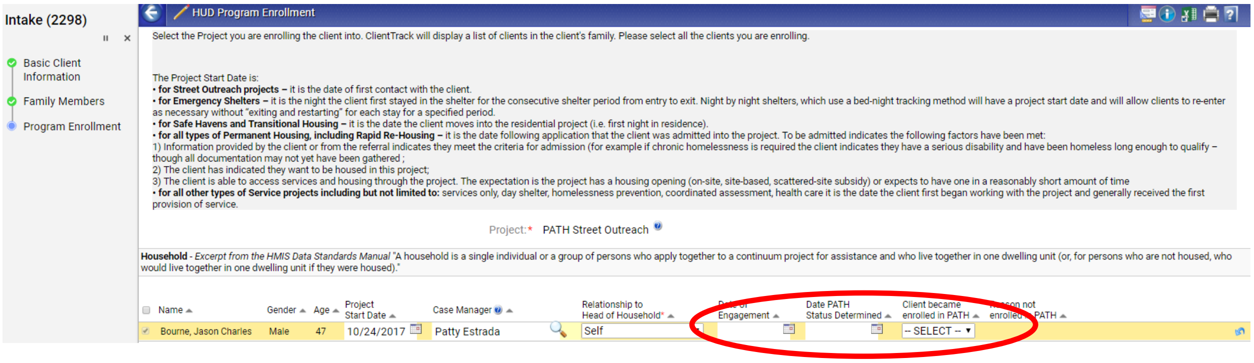


Updating PATH Enrollment Adding Engagement Date or PATH Enrolled

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

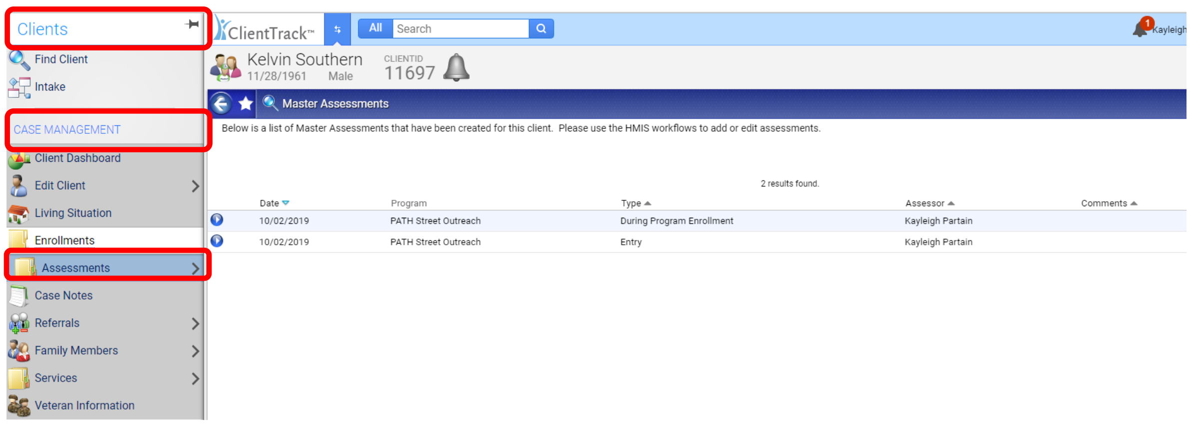


*__Note:__ You can make any changes to the Date of Engagement,Date PATH Status Dertemined, Client became enrollmed in PATH. **DO NOT CHANGE PROJECT START DATE;** You will then go through the entire workflow**.**

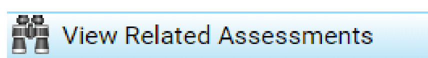


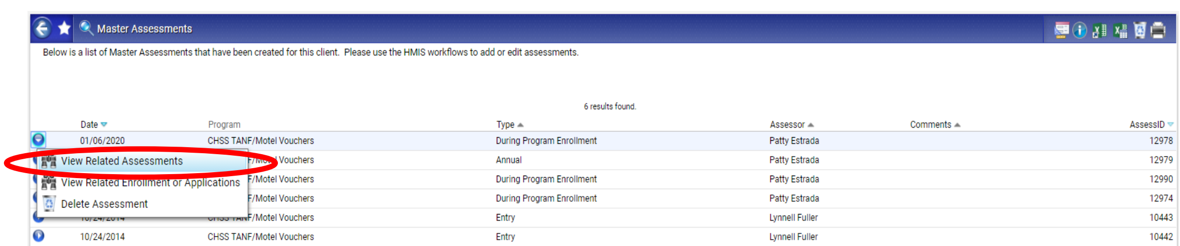
View and Edit Master Assessment

Select Menu>Case Management>Assessments

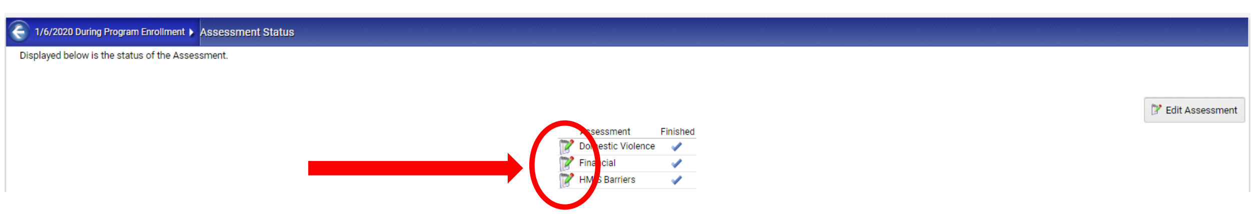


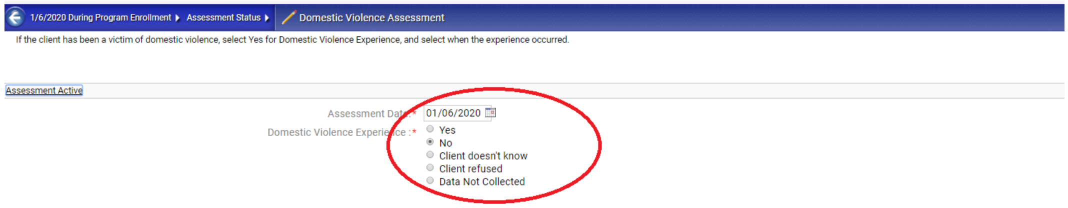
Click on the **Blue Action Arrow** and select **View Related Assessments**

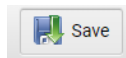


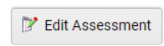


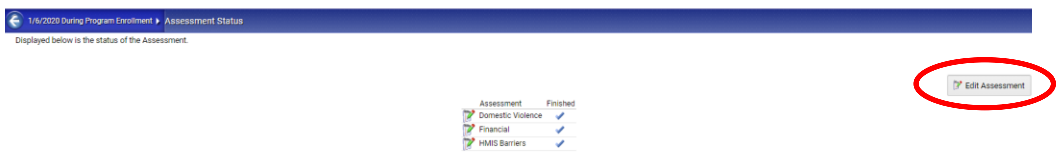
You can click on the Note Pad  and Edit one of the Assessments



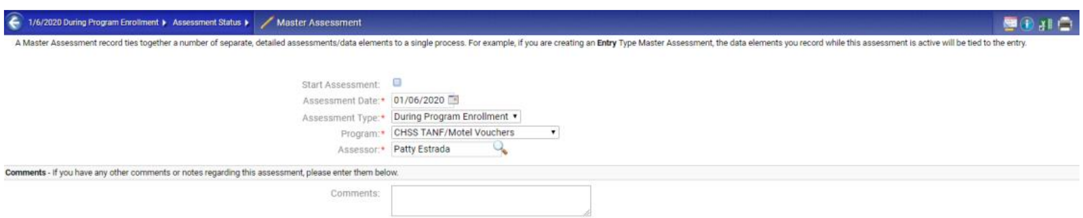


Make sure you save any changes you might have made 

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



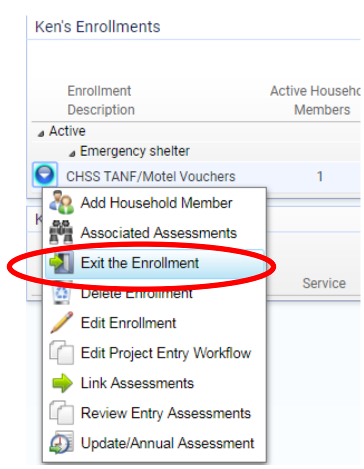
Universal Data Assessment



Once complete 

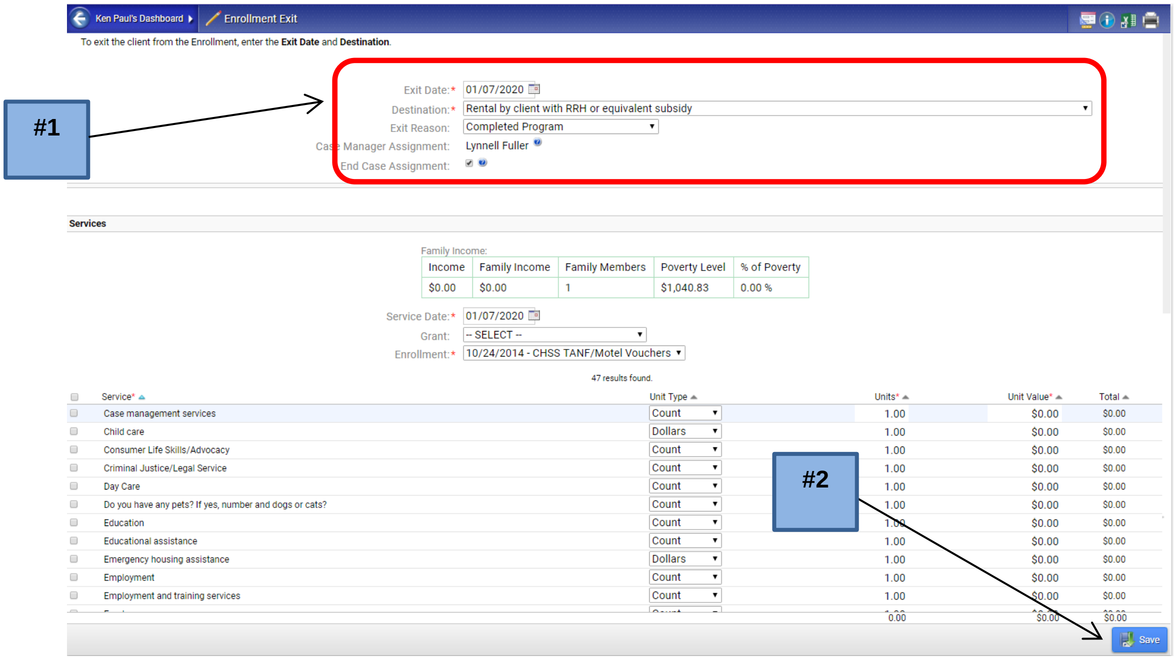
Exit Enrollments

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>**



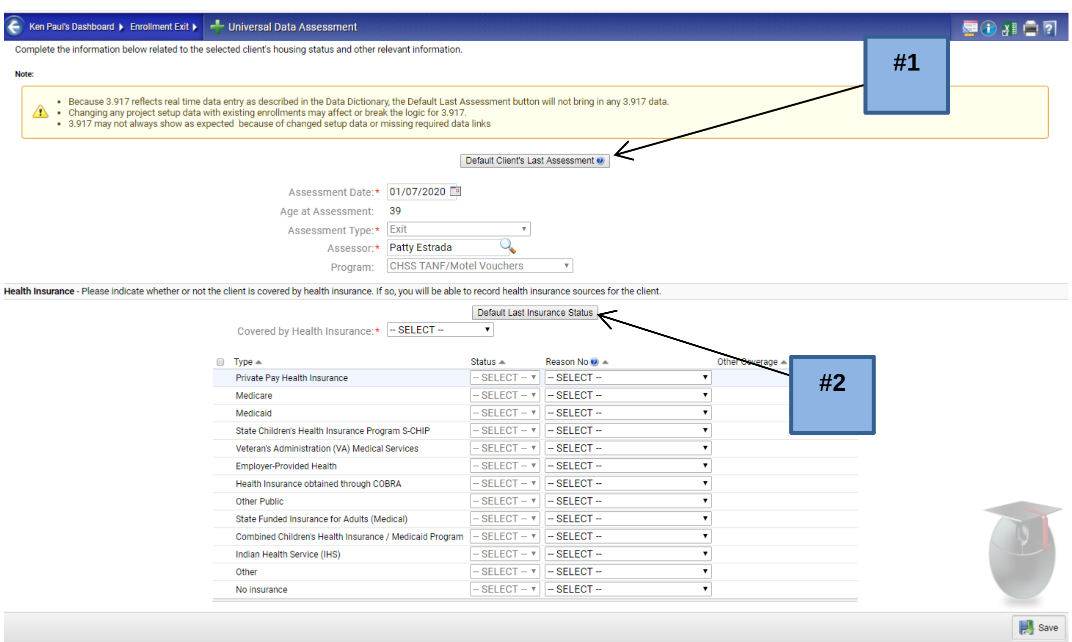
#1. Complete the Exit Date, Destination, Exit Reason, and End Case Assignment

#2. Do not complete the services from this screen, click Save

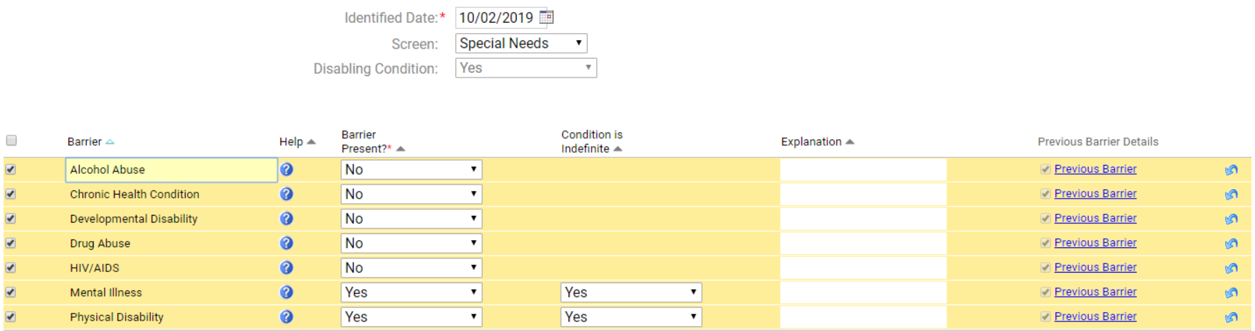


#1. Make sure Assessment Date is correct, (You are unable to change the Assessment Type or Program)

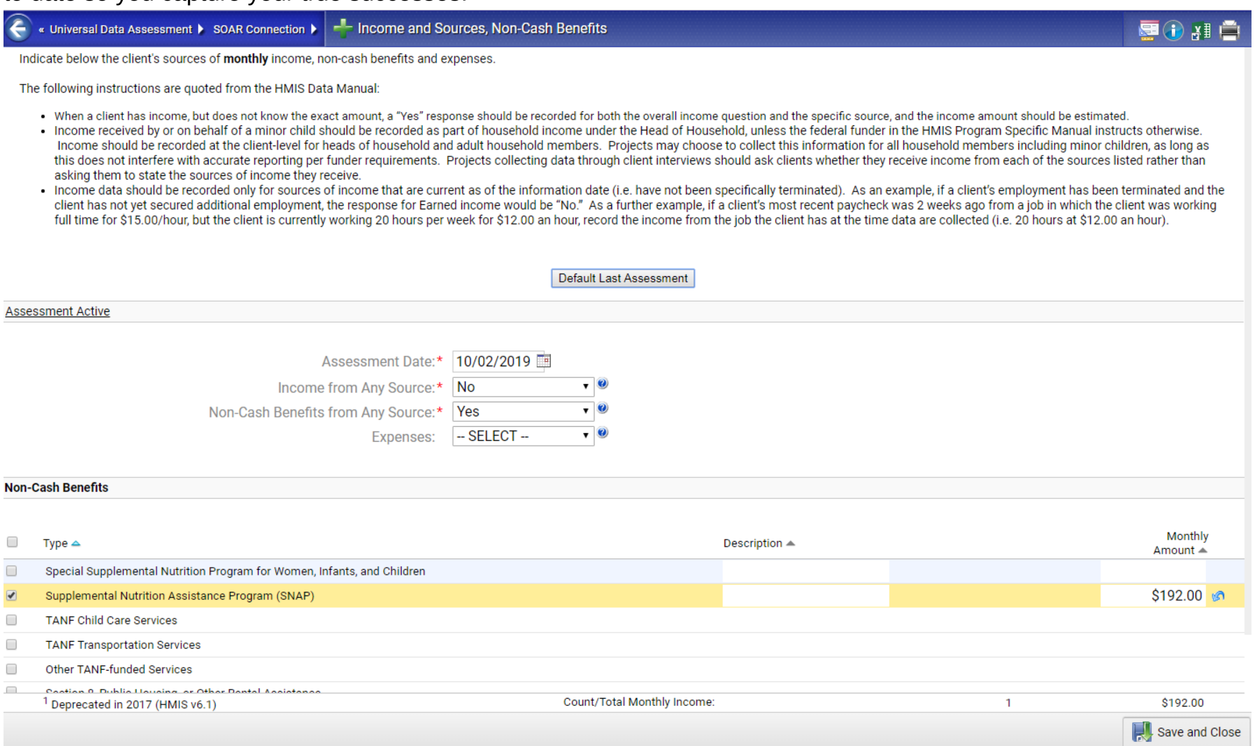
#2. Make sure you complete the Health Insurance. You may Default the Last Insurance Status, if there are no changes.



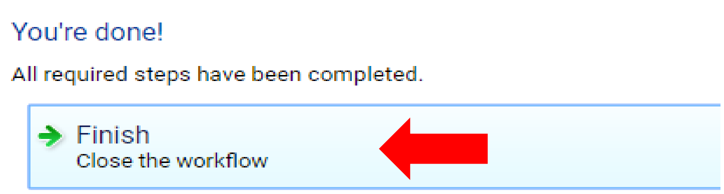
Barriers Assessment: Barriers are Defaulted. Verify for accuracy or changes.



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.



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



Unique Project Requirements at Exit

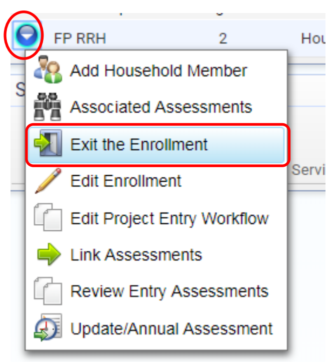
There are variations in data requirements for different project exits. In the following section are screenshots of project exits and their unique requirements during the exit workflow for the following projects.

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

Rapid Re-Housing Exit (RRH)

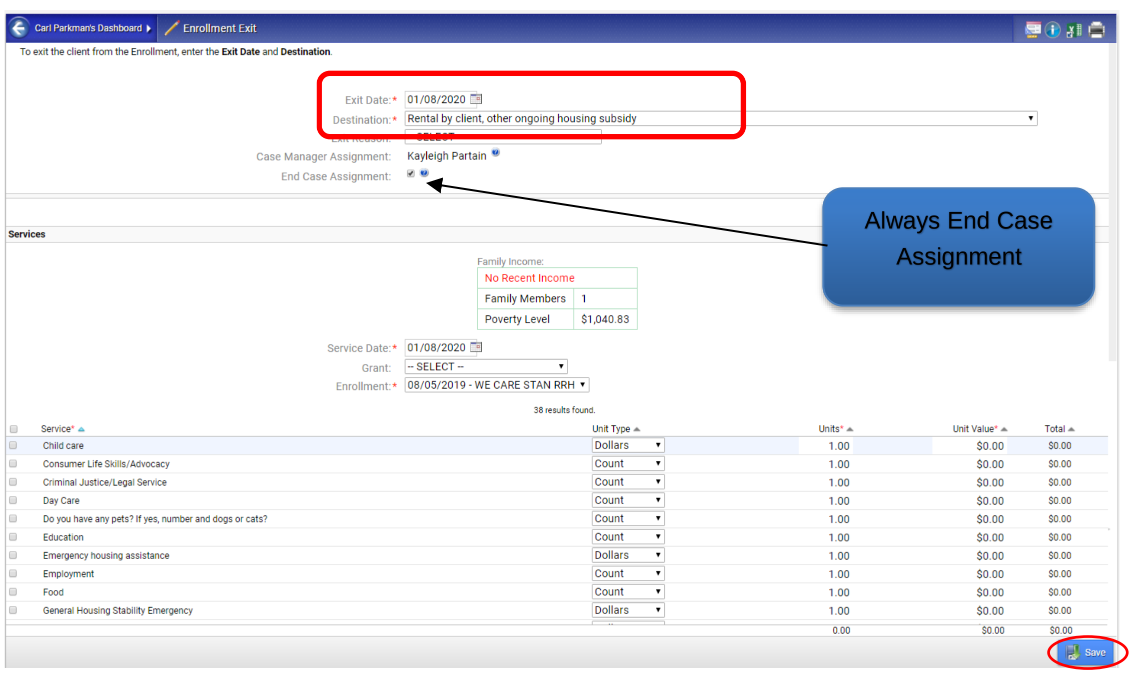
It is CRUCIAL prior to exiting RRH that you have updated the client record with a Housing Move-in Date as the Exit workflow will not ask.

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

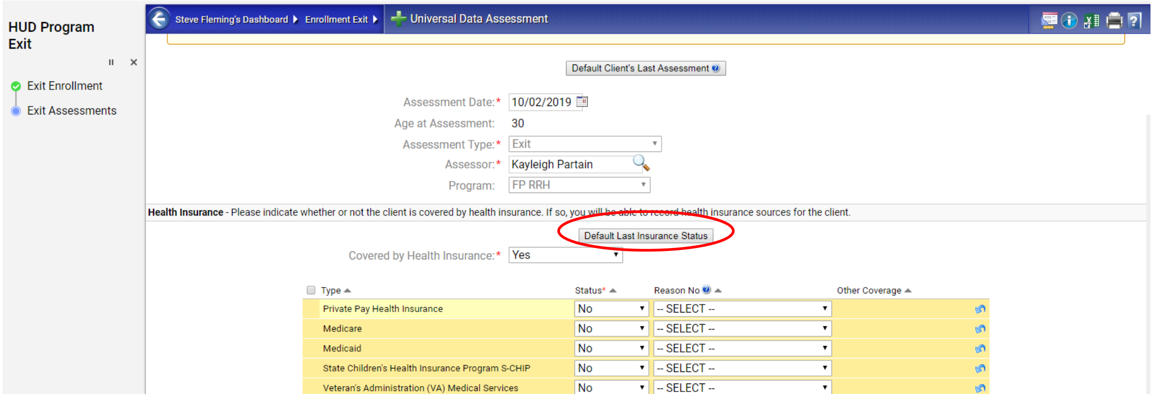


Select the **Blue Action Arrow** on the Enrollment you want to Exit and select **Exit the Enrollment**

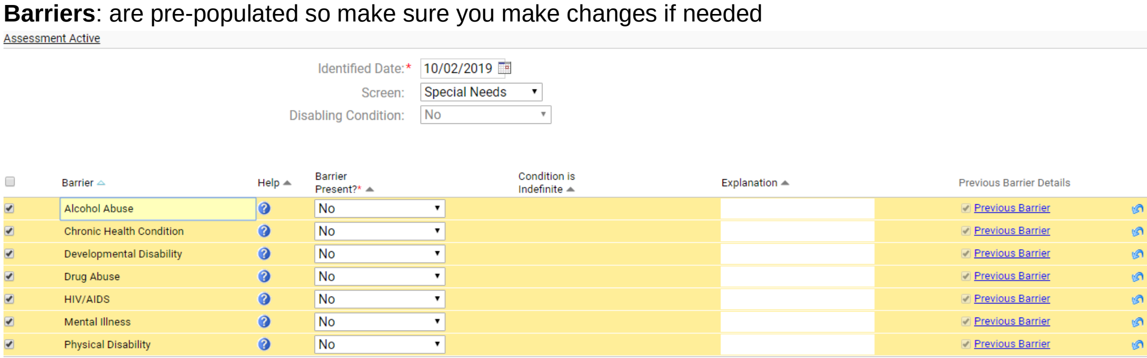
Enrollment Exit



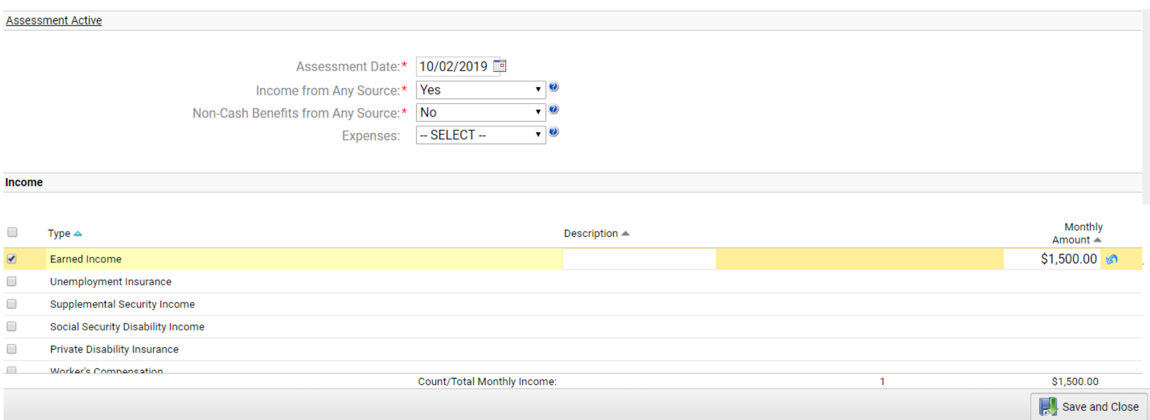
Universal Data Assessment:If there are no changes to the data you may default to last assessment.



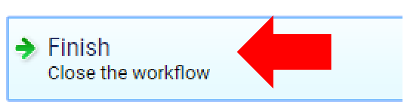
Barriers: are pre-populated so make sure you make changes if needed



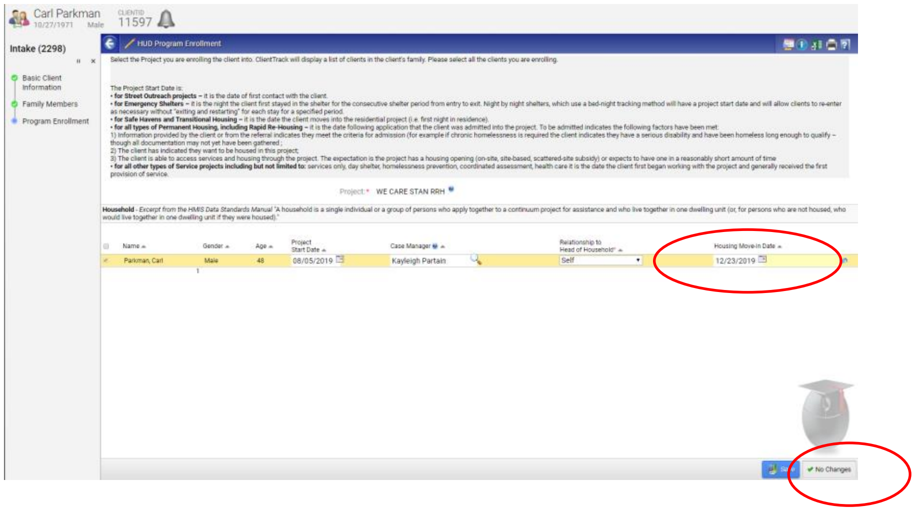
Income Sources & Non-Cash Benefits



Make Sure you click on Finish and Close the Workflow

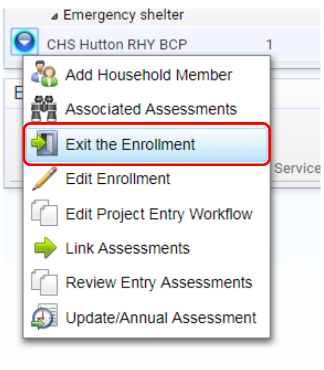


NOTE: Below is showing the client I just exited above from a RRH Project. Edit Project entry workflow to add the Housing Move-in Date to ensure your success will be captured in reporting!



Runaway Homeless Youth (RHY) Exit

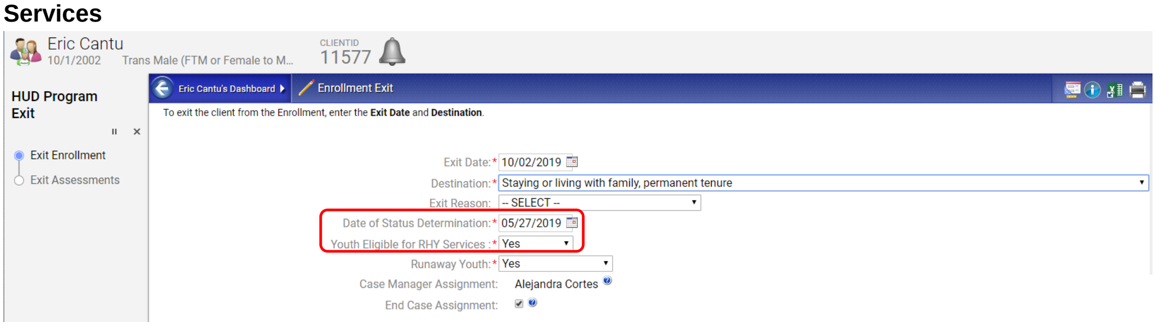
To begin with the Exit, you must begin at the Client Workspace on the Client Dashboard.



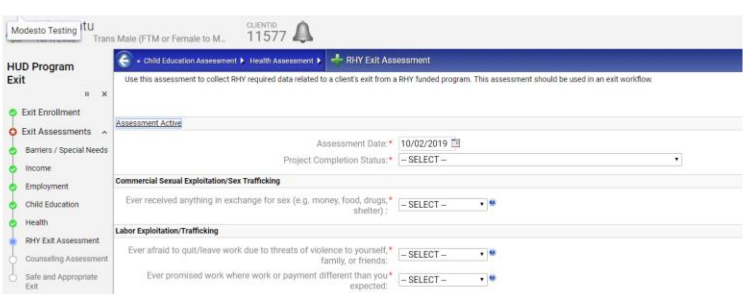
Click on the **Blue Action Arrow** for the Enrollment you want to Exit, and Select **Exit the Enrollment**

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

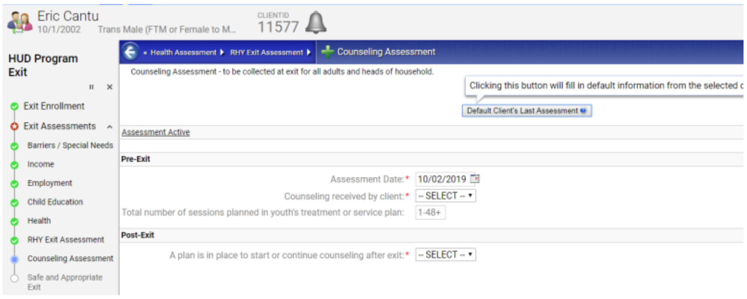
RHY Exit Assessment: RHY BCP will ask the **Date of Status Determination** & **Youth Eligible for RHY Services**



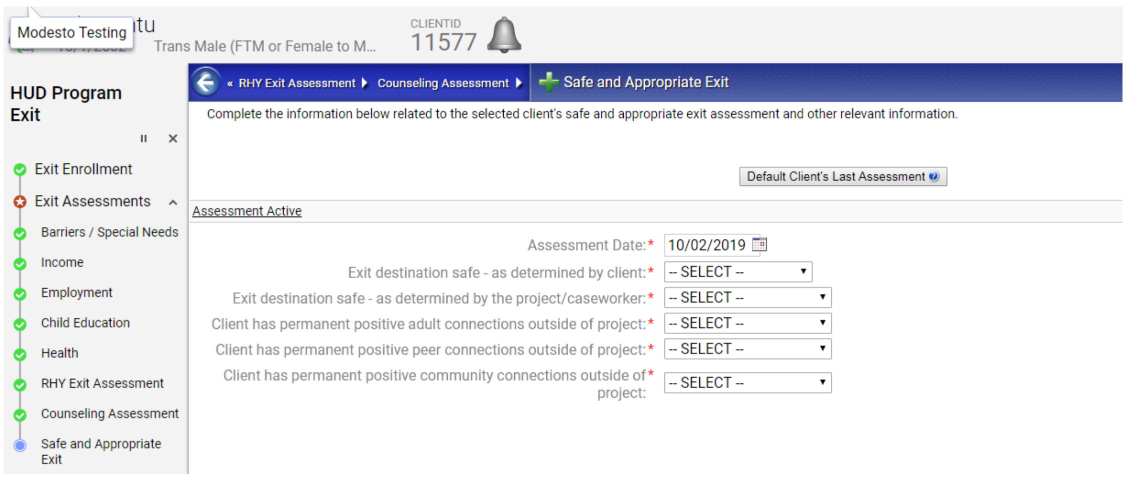
RHY EXIT Assessment



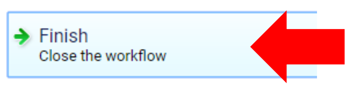
RHY Counseling Assessment



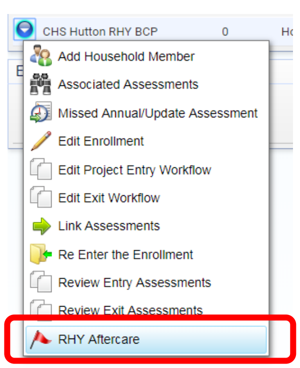
RHY Safe and Appropriate Exit



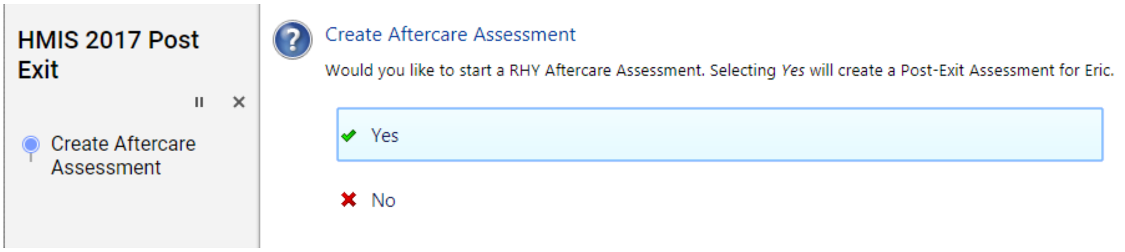
Make sure you click on Finish Close the workflow.



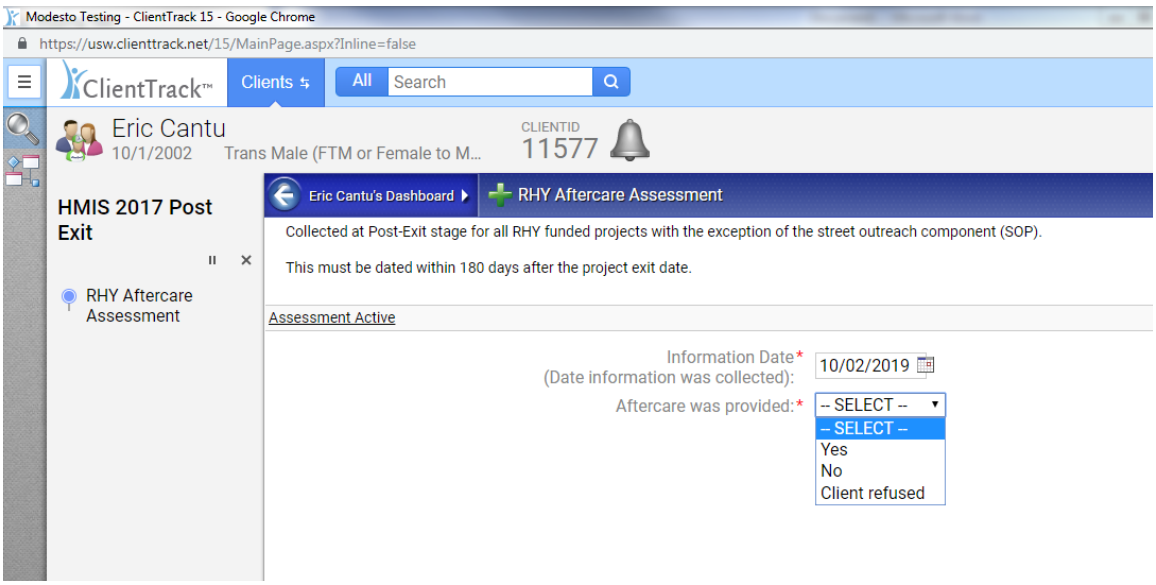
RHY Aftercare: This element is intended to record services provided beyond the period of residential stay that offers continuity and supportinve follow-up to youth served by the program. Aftercare is those entries that are entere after the date of exit up to 180 days.



Create Aftercare Assessment

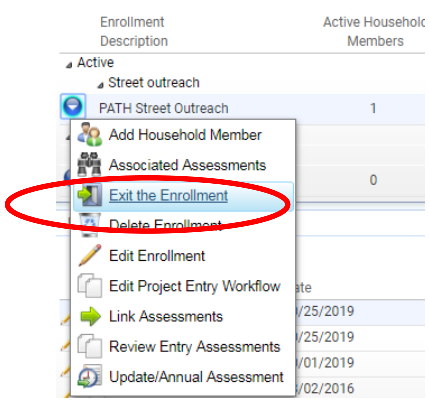


RHY Aftercare Assessment

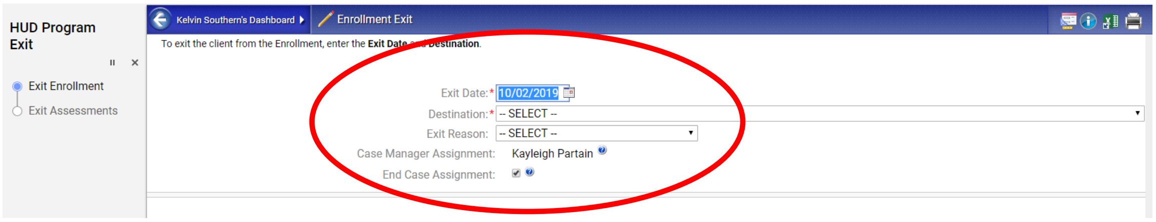


Projects for Assistance in Transition from Homelessness (PATH) Exit

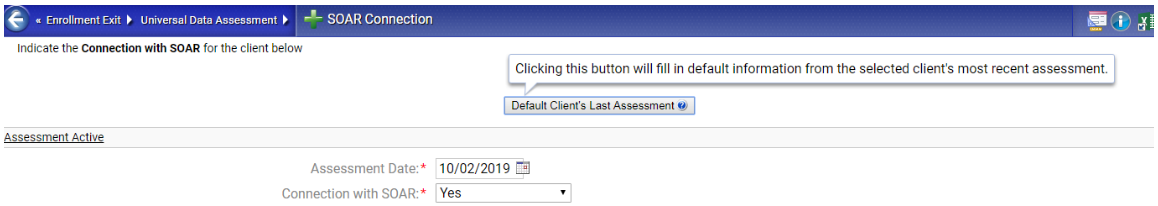
For PATH clients being discharged, their "Date of PATH Status Determined" and their PATH enrollment status will be required during the exit workflow on the "Enrollment Exit" screen as seen below. This information should have been entered on the Update. The system will give you one last opportunity to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



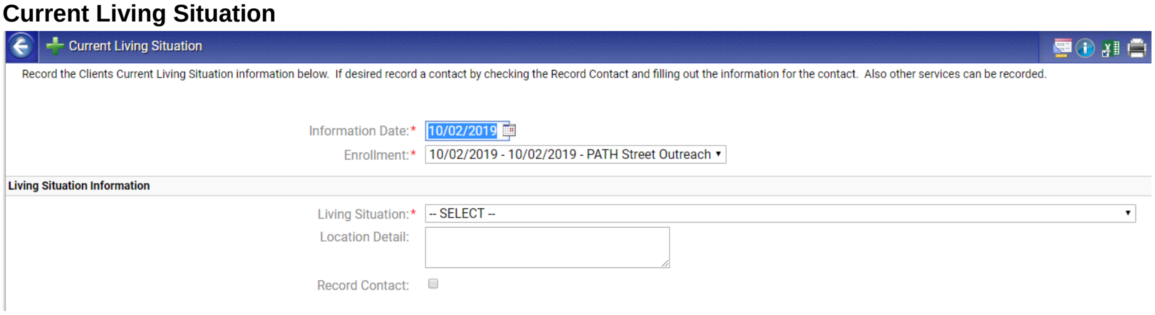
Enrollment Exit



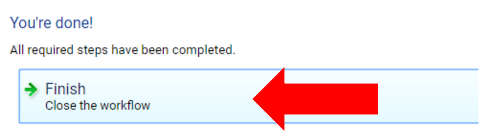
SOAR Connection



Current Living Situation



Make sure you click on Finish Close the workflow.

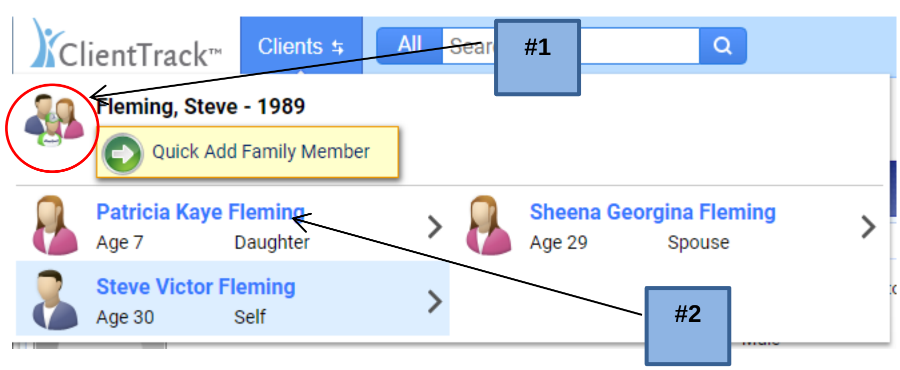


Exiting Only One Family Member From Enrollment

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

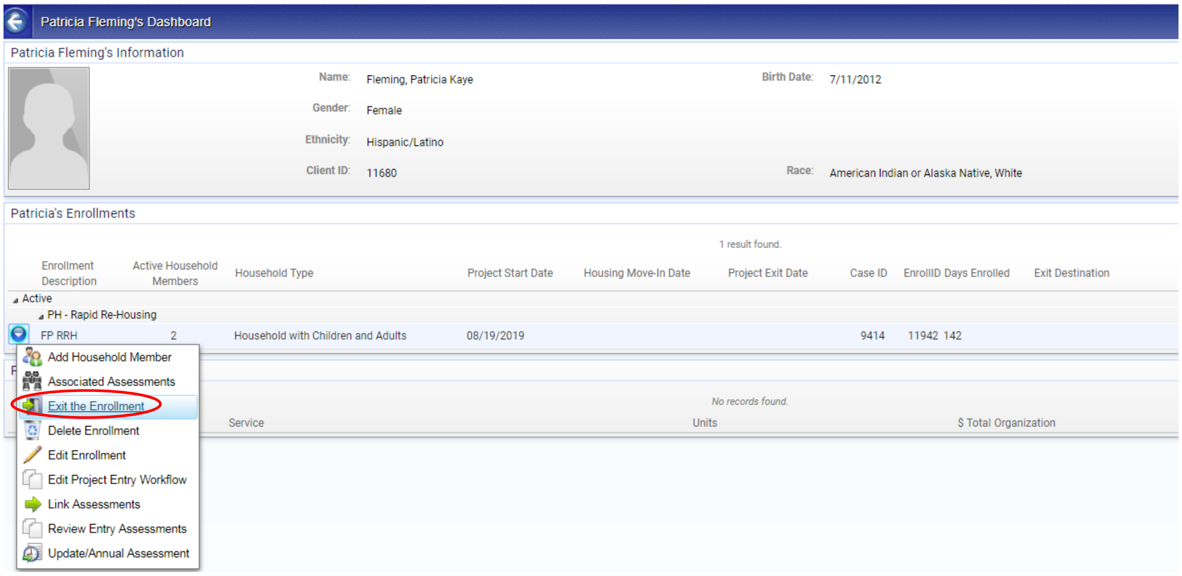
#1. Bring up the family member/client you want to exit. You can get there from the “family icon” on the HOH Dashboard

#2. The list of family members will show in the drop-down. Click on the client’s name (Patricia Fleming)

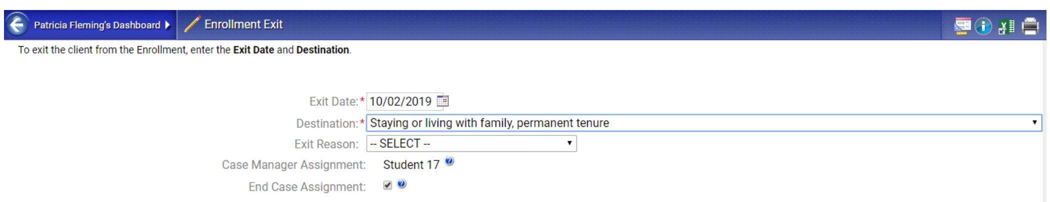


Client Dashboard

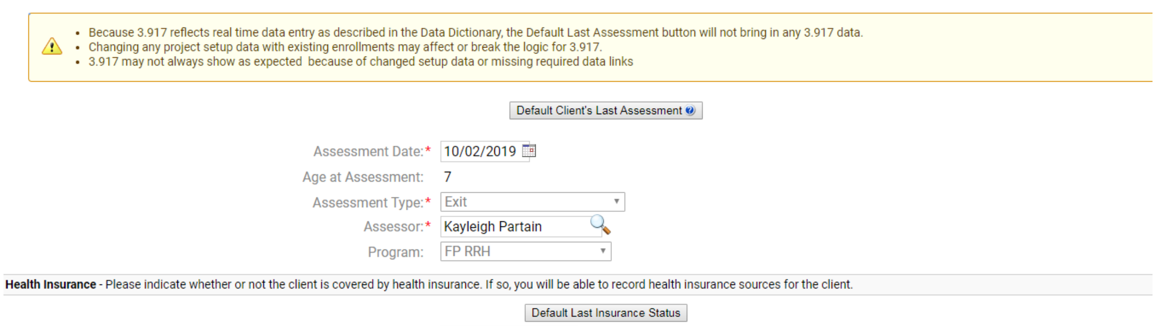
#3. Select the Blue Action Arrow for the Enrollment you want to exit
#4. Select Exit the Enrollment



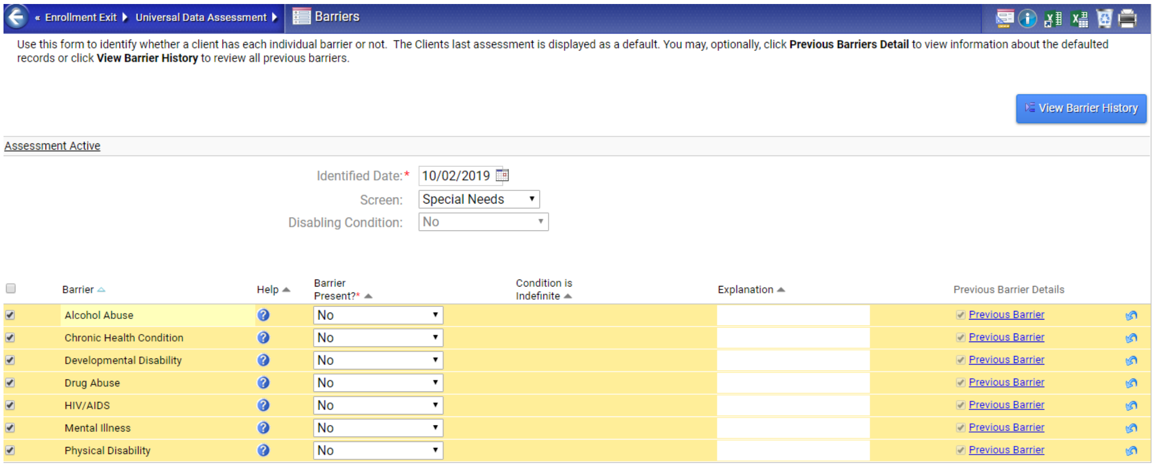
Exit Enrollment Assessment



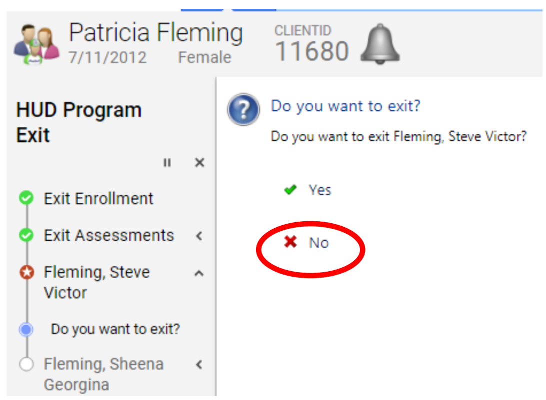
Universal Data Assessment



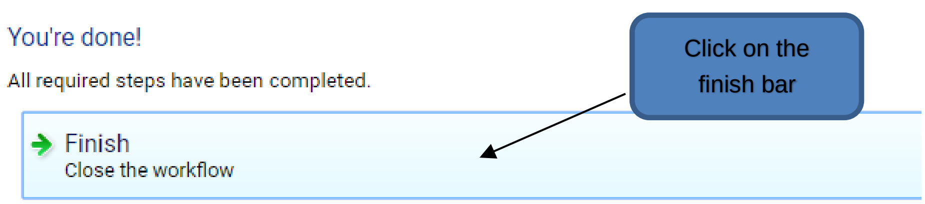
Barriers Assessment



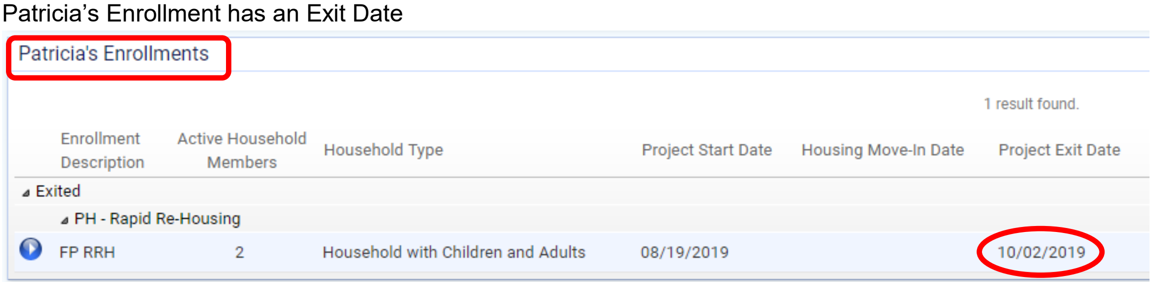
It will ask if you want to exit Steve Fleming. Select ✖ No



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



Patricia's Enrollment has an Exit Date



Steve's Enrollment has No Exit Date

Steve's Enrollments

1 result found.

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

De-Identifying Client

For use when HMIS Release of Information is Refused at Intake

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

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

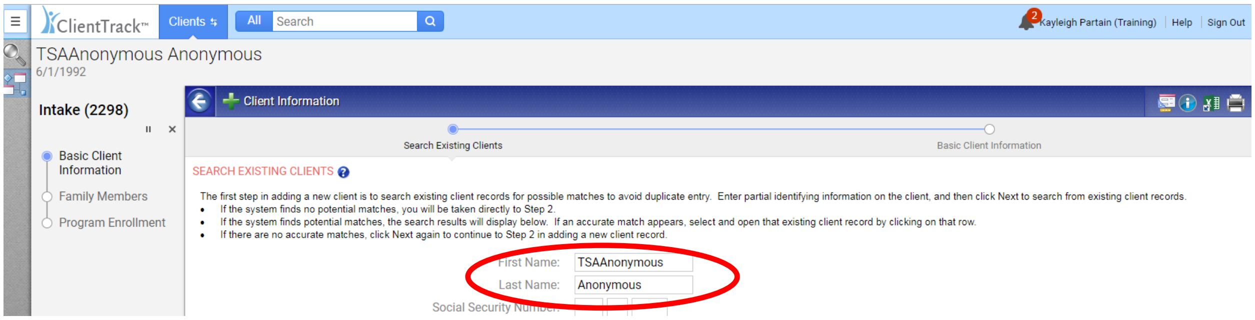
Note: This process must be completed for all members in the household so the person who refuses consent is not easily identifiable.

Agency Acronyms:

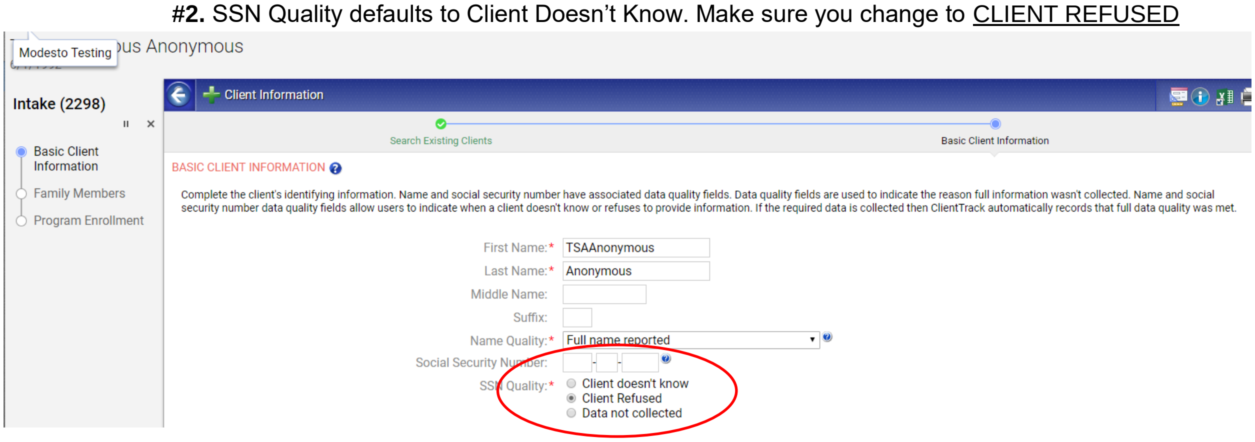
- Behavioral Health and Recovery Services: **BHRS**
- Catholic Charities of the Diocese of Stockton: **CCD**
- Center for Human Services: **CHS**
- Children's Crisis Center: **CCC**
- Community Housing and Shelter Services: **CHSS**
- Community Impact Central Valley: **CICV**
- Turning Point: **TP**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

Client Information

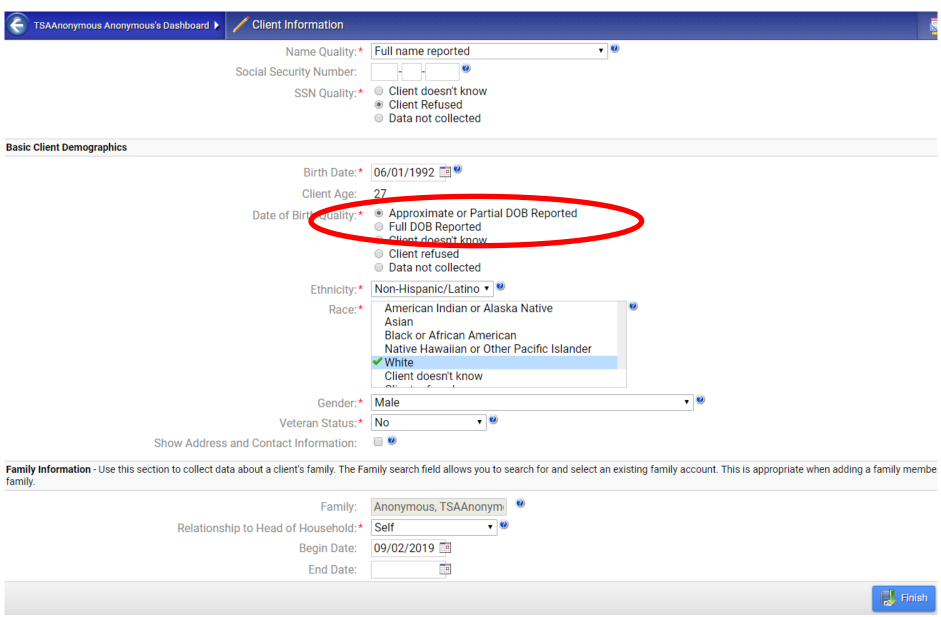
#1. Only add First and Last Name for Code Name



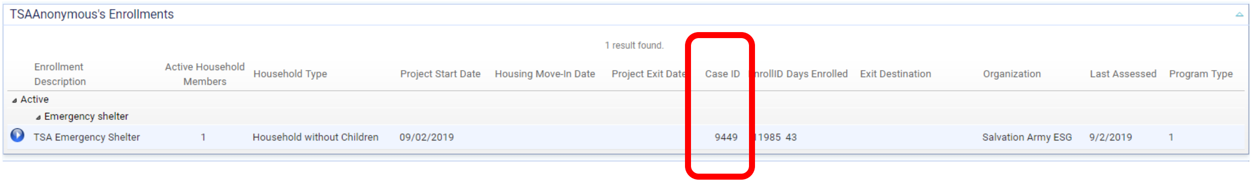
#2. SSN Quality defaults to Client Doesn't Know. Make sure you change to <u>CLIENT REFUSED</u>



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



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.



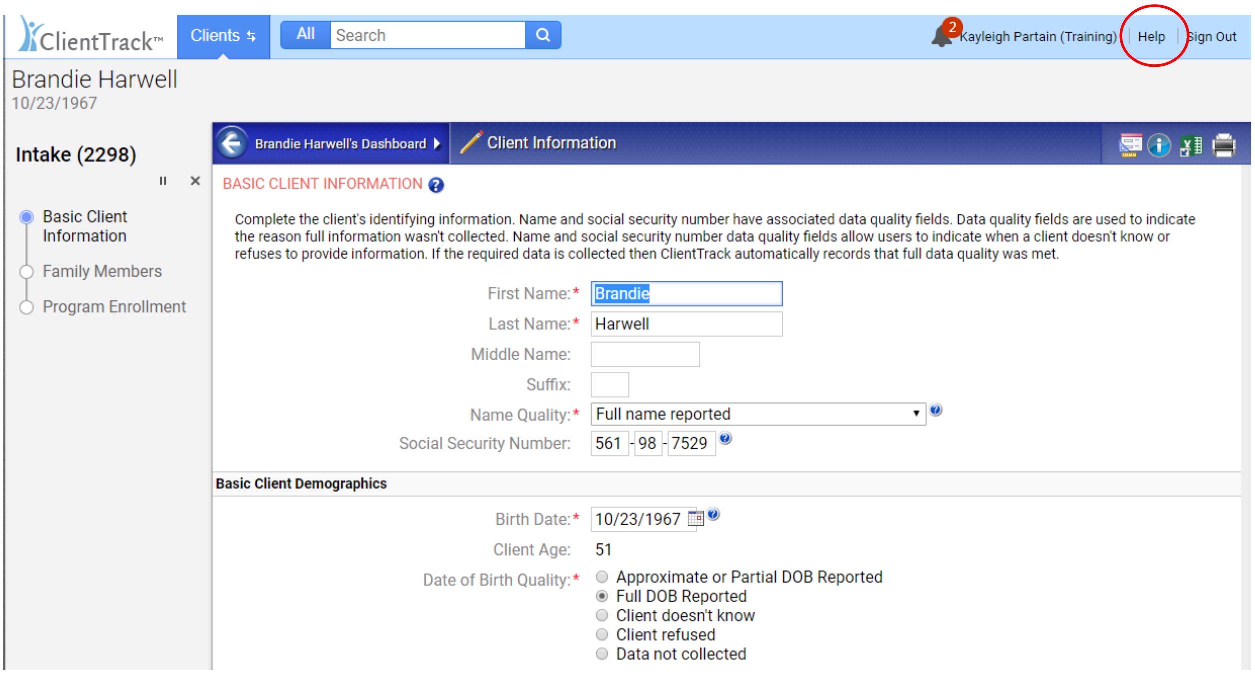
Example: Joe Smith, SSN 555-55-5555, Client ID 11719, Case ID 9449

Submitting Support Issues Internally Through ClientTrack

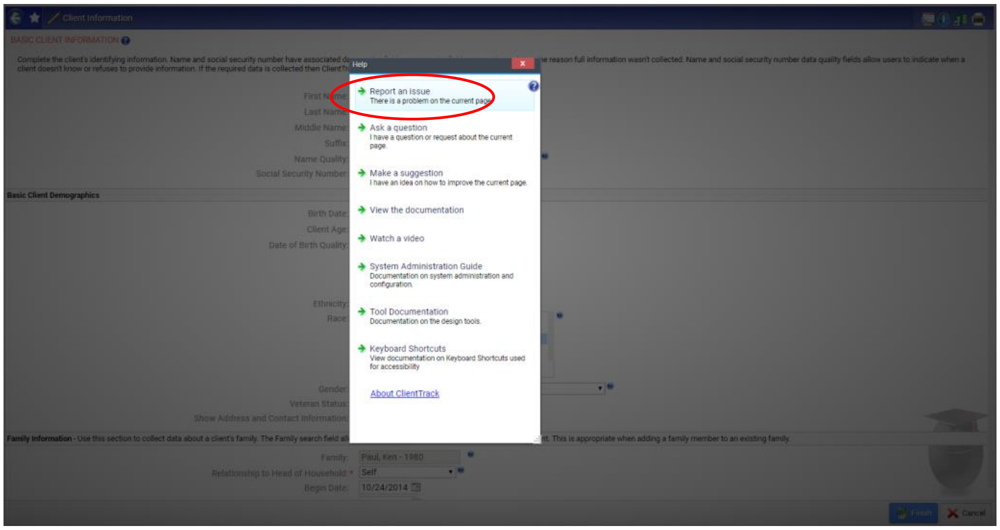
If you need assistance logging into HMIS, please email HMIS Support. If you need assistance after logging into HMIS, please follow the steps listed below.

*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.

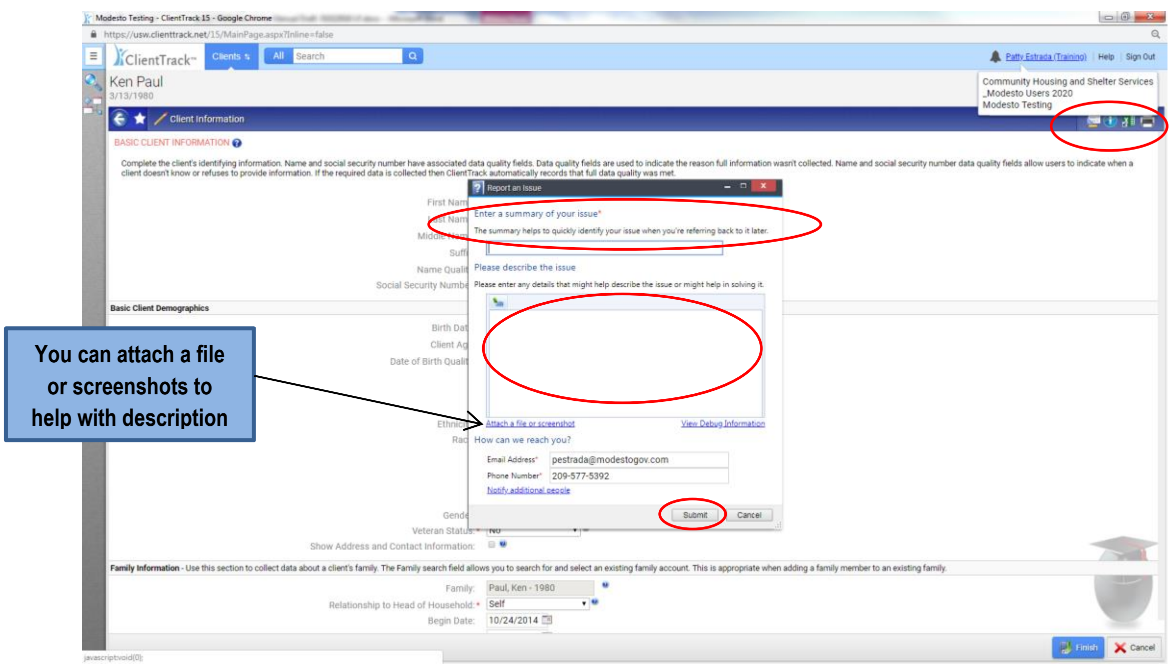
Example: I am trying to do an intake for Brandie Harwell and I am not seeing all of the client's information. I would click on the **Help** link from the page I am on.



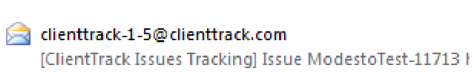
Click on Report an Issue (There is a problem on the current page)

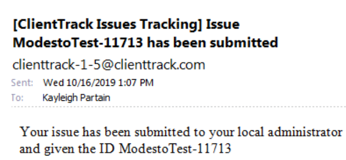


Enter Subject/Summary, start with **client ID** and a **brief description of the issue**. In the **text box**, add **workgroup**, **organization**, **program**, **client ID**, **client name**, and **specific details to the issue you are having or any information that may help to resolve**. **Be very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

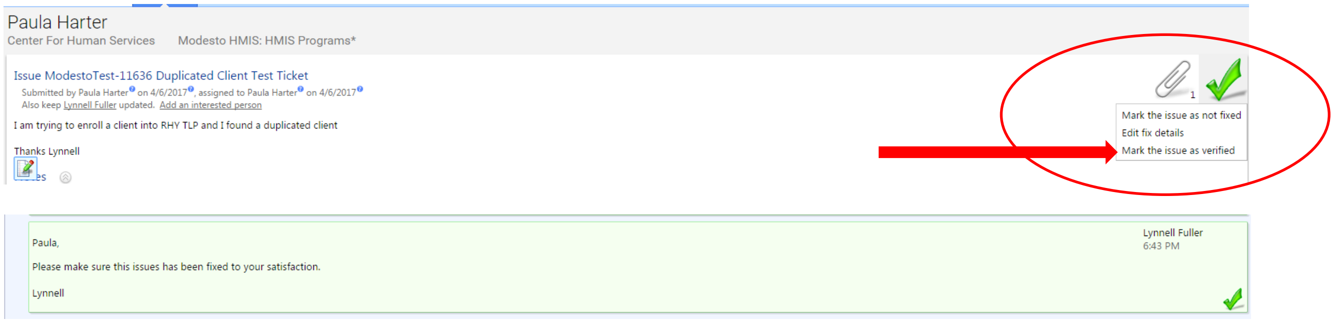


You and the system administrator will receive an email with a ticket number once it has been submitted.





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



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

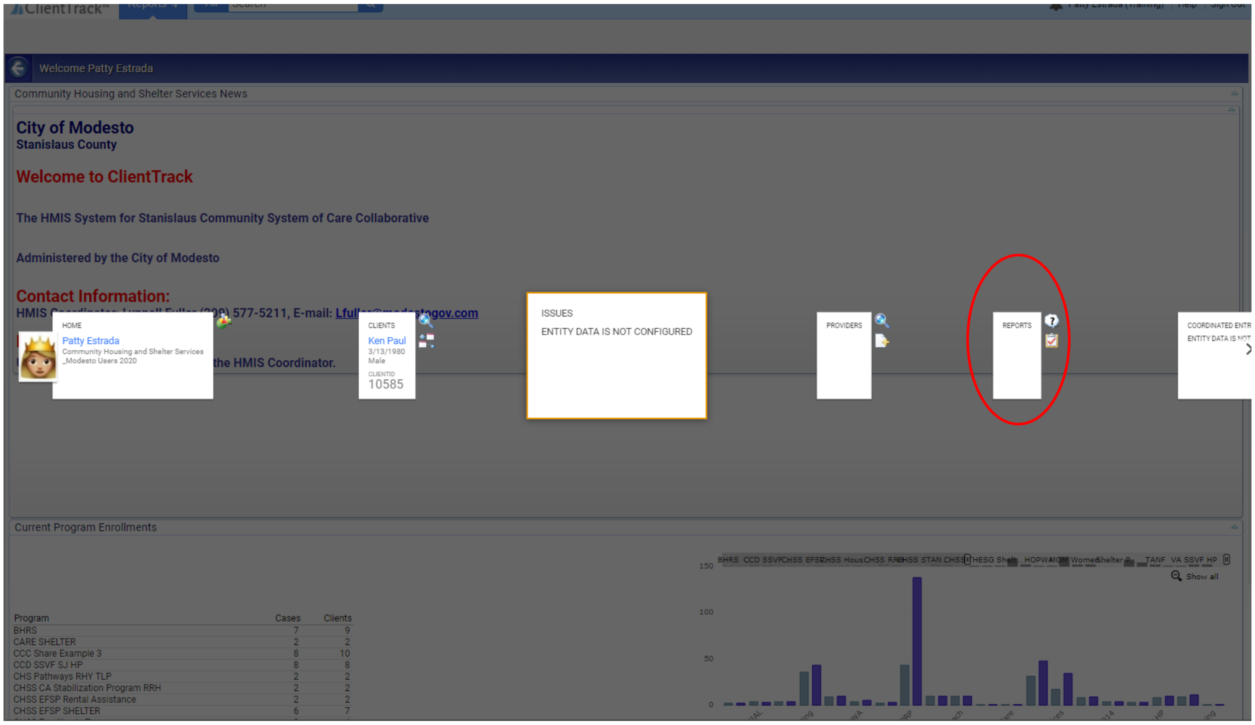
To Edit your note or add notes you can click on the pencil. 

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

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

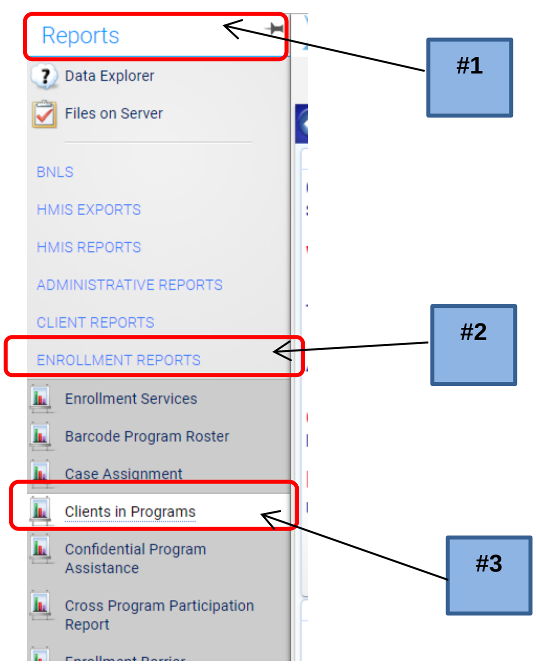
HMIS Reports

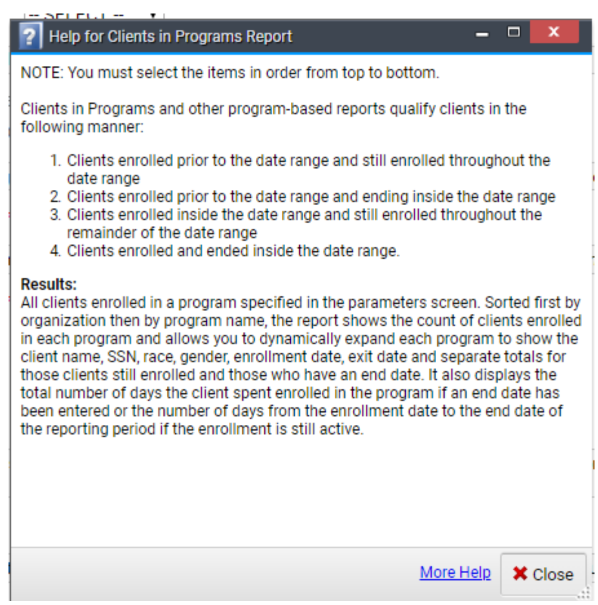
Access the Reports Workspace from the Workspace Carrousel.



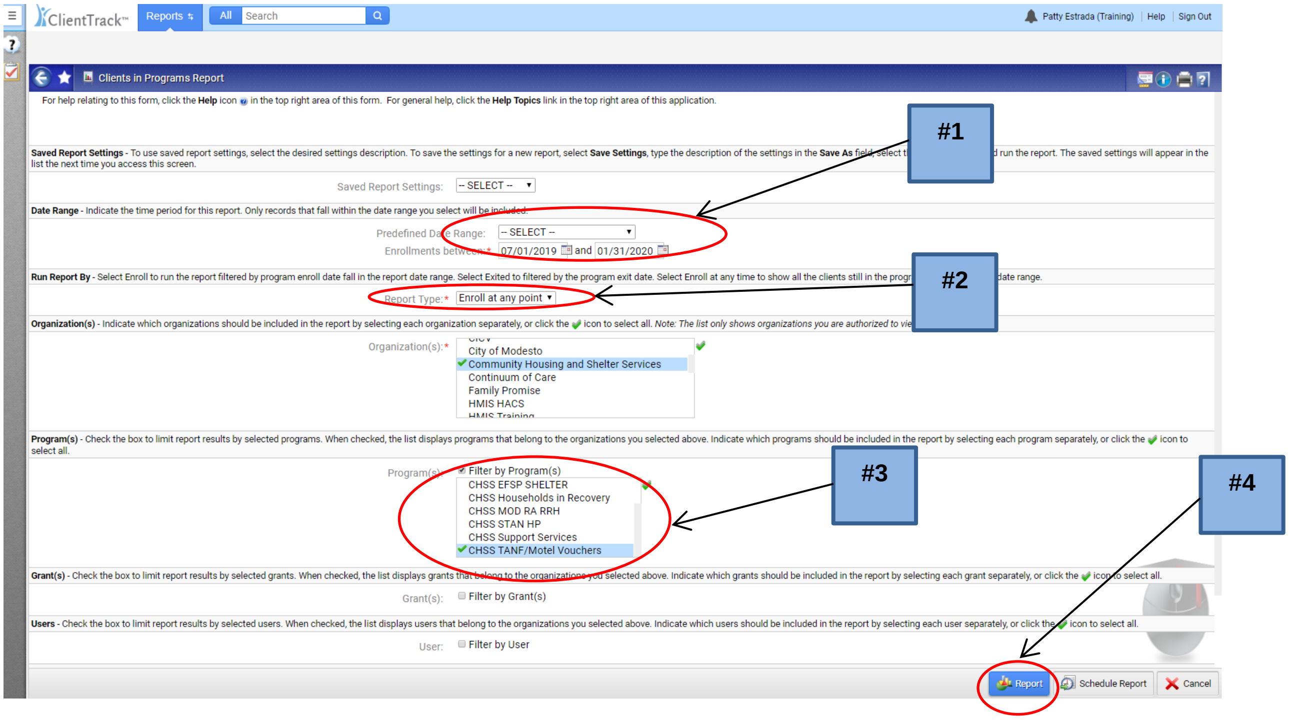
Clients in Program

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

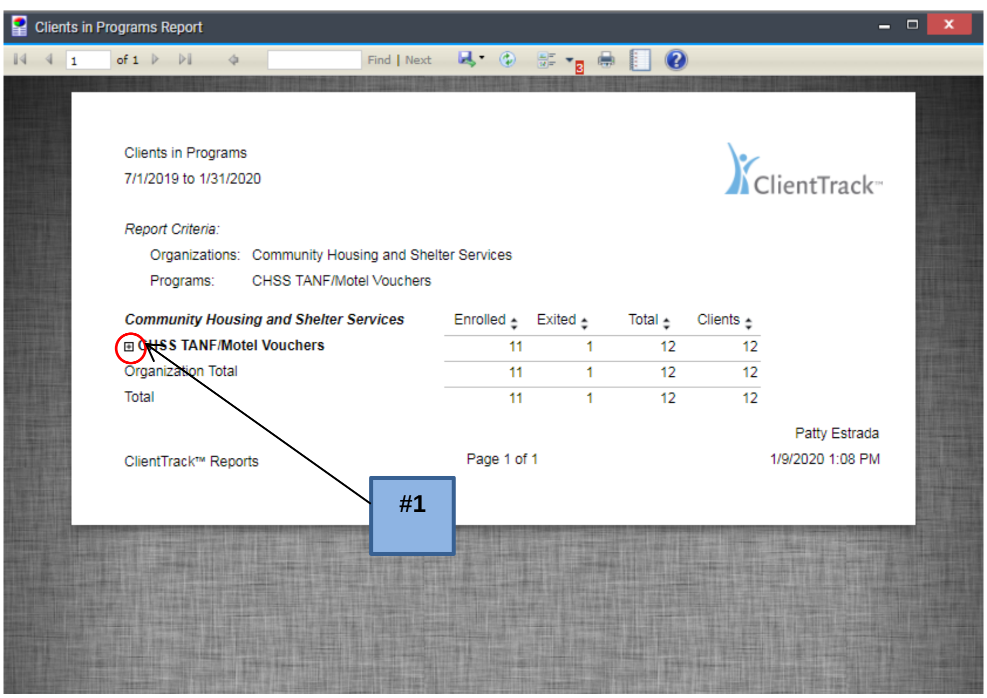




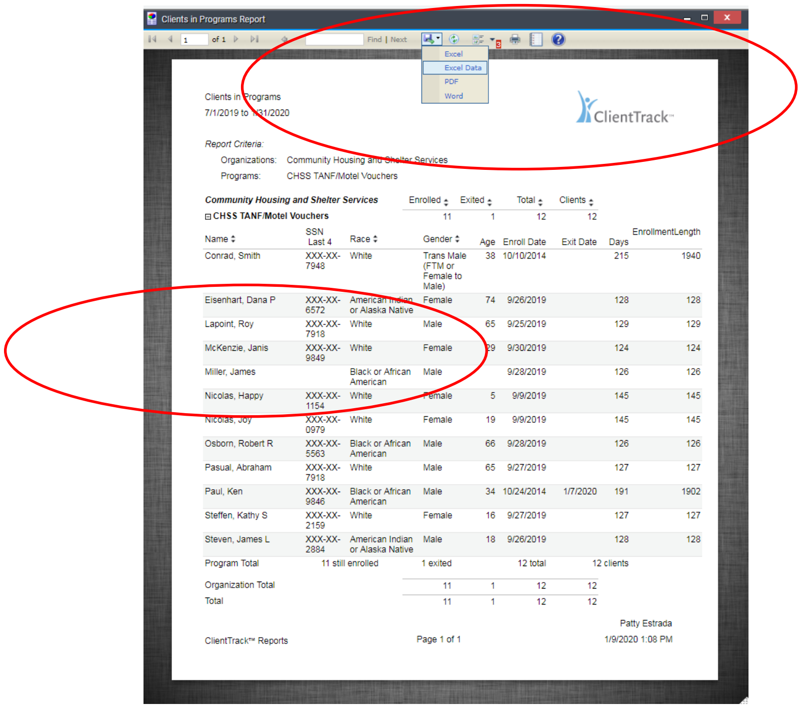
#1. Specify the Date Range **#2.** Report Type **#3.** Program **#4.** Report



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



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



Clients in Programs
7/1/2019 to 1/31/2020

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

Community Housing and Shelter Services	Enrolled	Exited	Total	Clients
CHSS TANF/Motel Vouchers	11	1	12	12

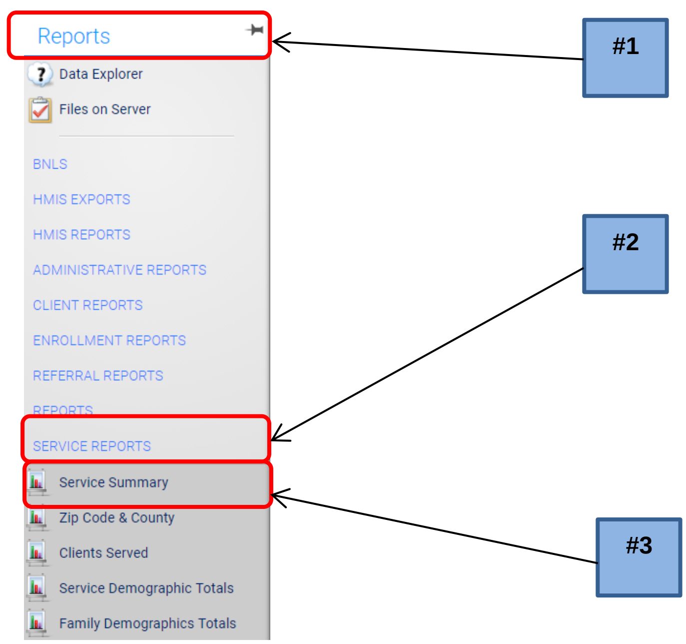
Name	SSN Last 4	Race	Gender	Age	Enroll Date	Exit Date	Days	EnrollmentLength
Conrad, Smith	XXX-XX-7948	White	Trans Male (FTM or Female to Male)	38	10/10/2014		215	1940
Eisenhart, Dana P	XXX-XX-6572	American Indian or Alaska Native	Female	74	9/26/2019		128	128
Lapoint, Roy	XXX-XX-7918	White	Male	65	9/25/2019		129	129
McKenzie, Janis	XXX-XX-9849	White	Female	29	9/30/2019		124	124
Miller, James		Black or African American	Male		9/28/2019		126	126
Nicolas, Happy	XXX-XX-1154	White	Female	5	9/9/2019		145	145
Nicolas, Joy	XXX-XX-0979	White	Female	19	9/9/2019		145	145
Osborn, Robert R	XXX-XX-5563	Black or African American	Male	66	9/28/2019		126	126
Pasual, Abraham	XXX-XX-7918	White	Male	65	9/27/2019		127	127
Paul, Ken	XXX-XX-9846	Black or African American	Male	34	10/24/2014	1/7/2020	191	1902
Steffen, Kathy S	XXX-XX-2159	White	Female	16	9/27/2019		127	127
Steven, James L	XXX-XX-2884	American Indian or Alaska Native	Male	18	9/26/2019		128	128
Program Total	11 still enrolled		1 exited		12 total		12 clients	

	Enrolled	Exited	Total	Clients
Organization Total	11	1	12	12
Total	11	1	12	12

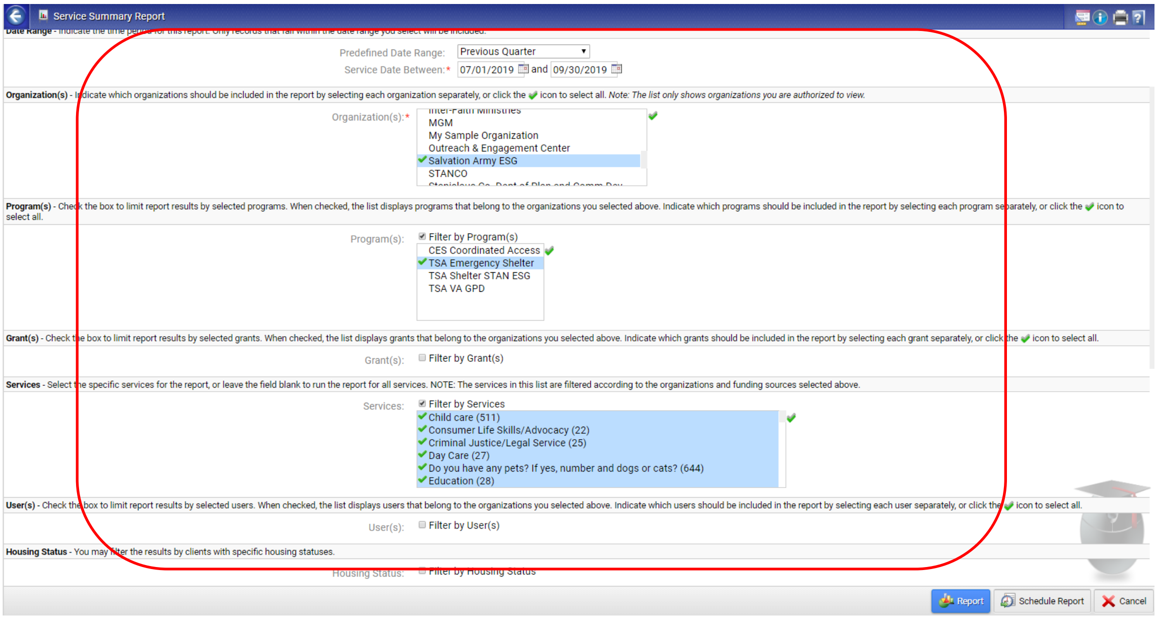
Patty Estrada
ClientTrack™ Reports Page 1 of 1 1/9/2020 1:08 PM

Service Summary Report

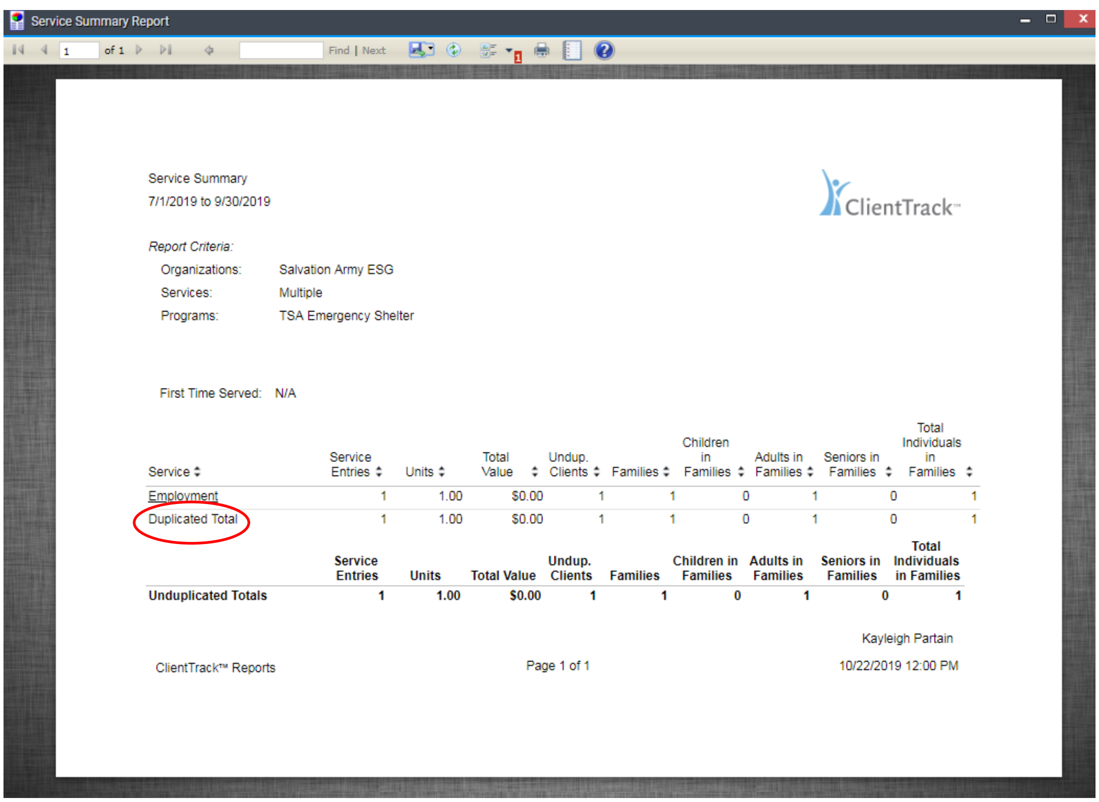
Reports Workspace, open **Menu Navigation**, select **Service Reports**, then choose **Service Summary**



Complete Date Range, Program, Services, and Report

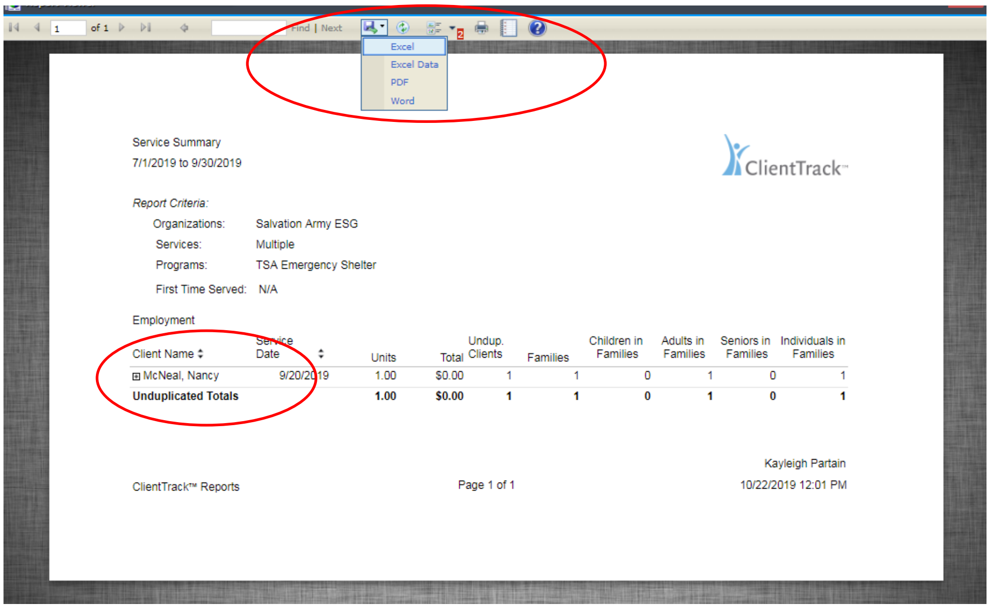


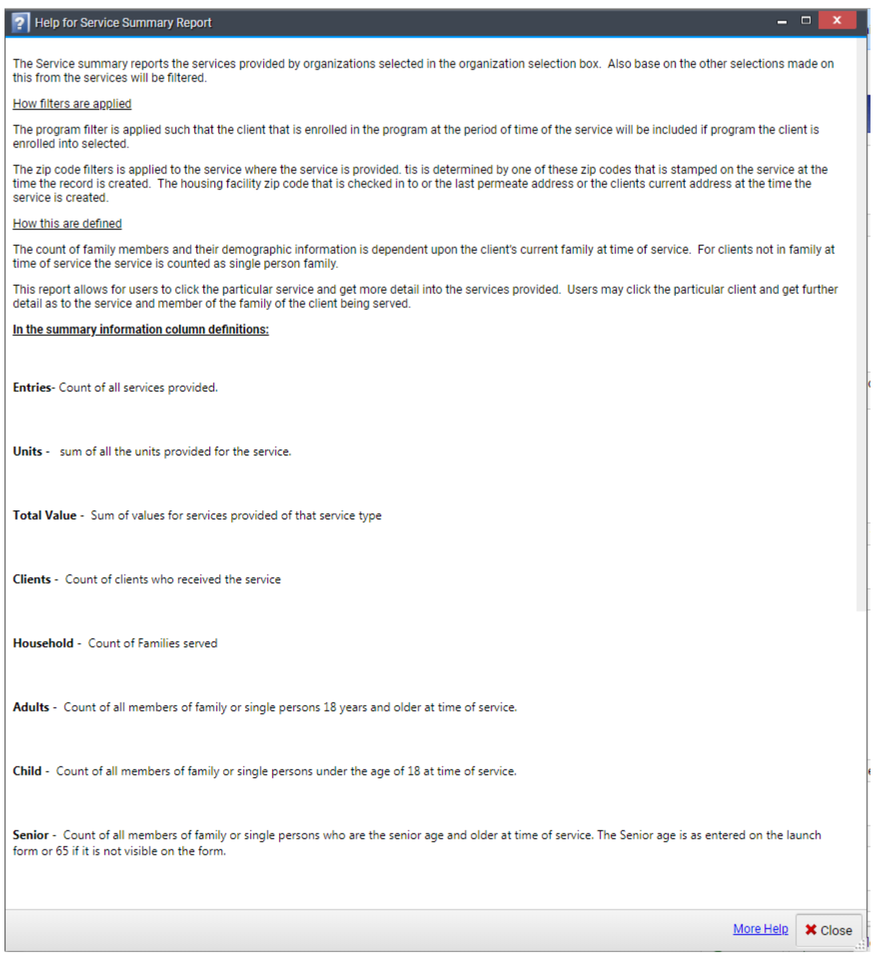
To see the detail of the service, Click on the Service (“ Employment”) to view the clients’ names under that service.



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.




Help for Service Summary Report

The Service summary reports the services provided by organizations selected in the organization selection box. Also base on the other selections made on this from the services will be filtered.

How filters are applied

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

The zip code filters is applied to the service where the service is provided. tis is determined by one of these zip codes that is stamped on the service at the time the record is created. The housing facility zip code that is checked in to or the last permeate address or the clients current address at the time the service is created.

How this are defined

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

This report allows for users to click the particular service and get more detail into the services provided. Users may click the particular client and get further detail as to the service and member of the family of the client being served.

In the summary information column definitions:

Entries- Count of all services provided.

Units - sum of all the units provided for the service.

Total Value - Sum of values for services provided of that service type

Clients - Count of clients who received the service

Household - Count of Families served

Adults - Count of all members of family or single persons 18 years and older at time of service.

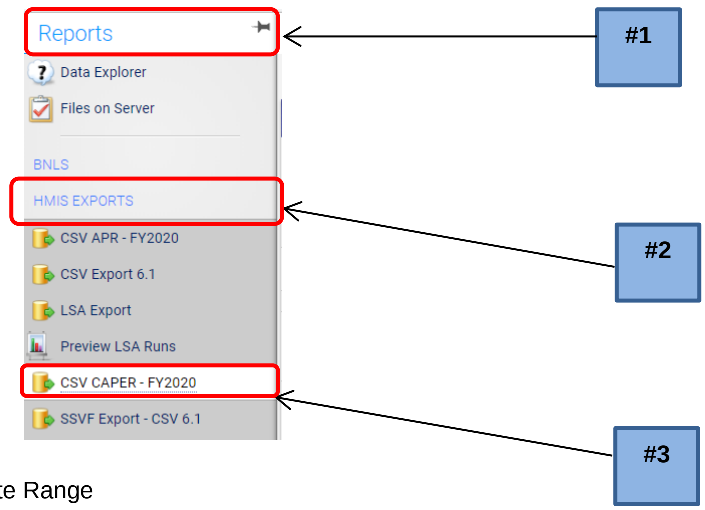
Child - Count of all members of family or single persons under the age of 18 at time of service.

Senior - Count of all members of family or single persons who are the senior age and older at time of service. The Senior age is as entered on the launch form or 65 if it is not visible on the form.

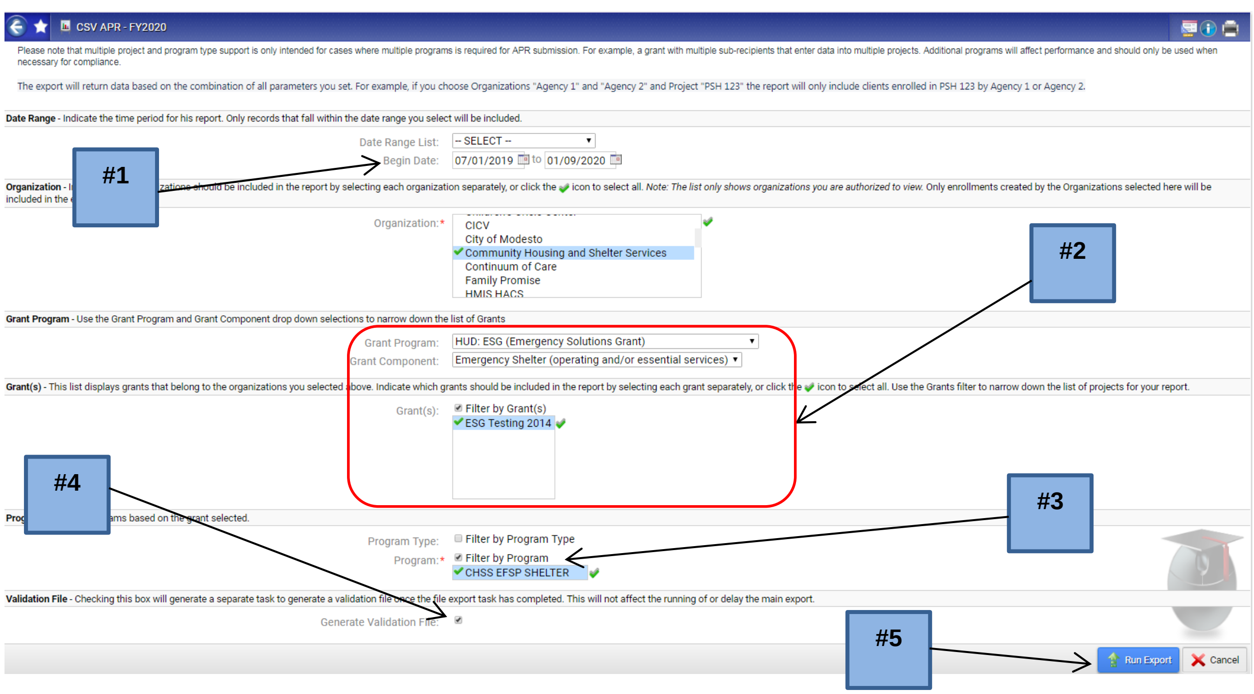
More Help Close

Emergency Soultions Grant (ESG) CAPER Export

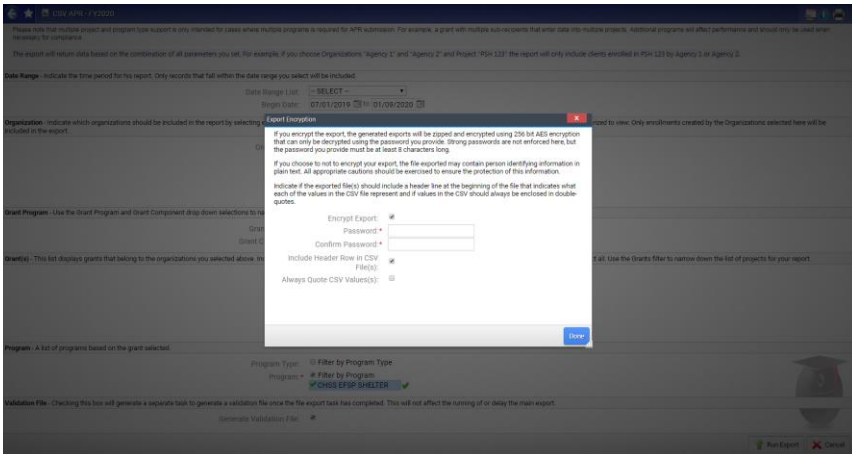
From the Reports Workspace>HMIS Exports>CSV CAPER-FY2020

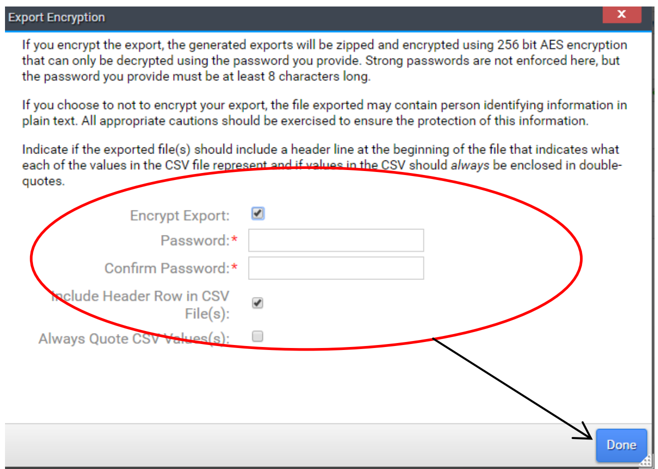


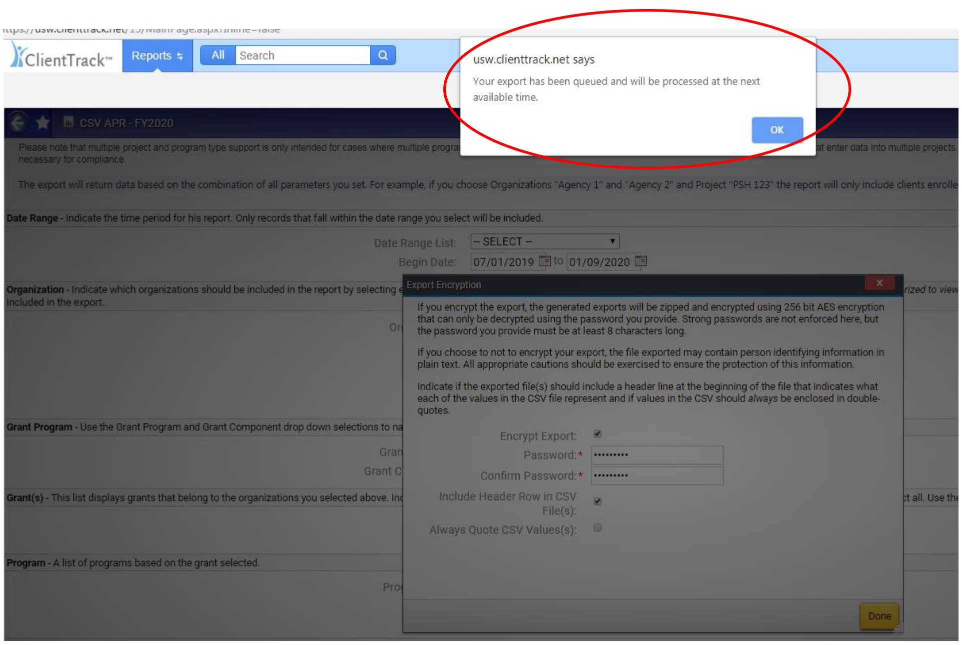
#1. Select Begin Date Range
#2. Choose Grant Program, Component, and Grants
#3. Choose Program
#4. Check Generate Validation File
#5. Run Report



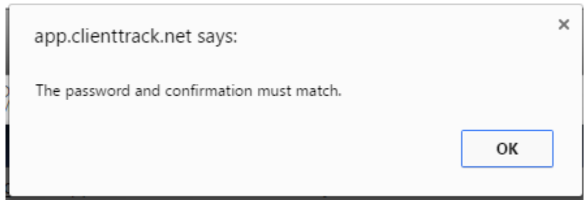
You will have to create a Password, keep the **Encrypt Export** and **Include Header Row in the CSV Files** boxes checked, you have the option to check Always Quote CSV Values but this is not necessary, see descriptions below. Then click Done.

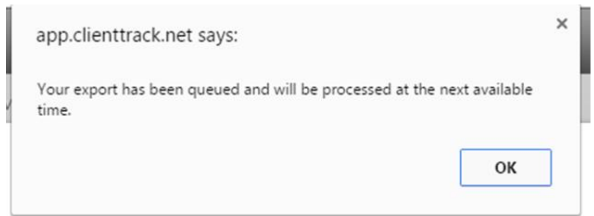




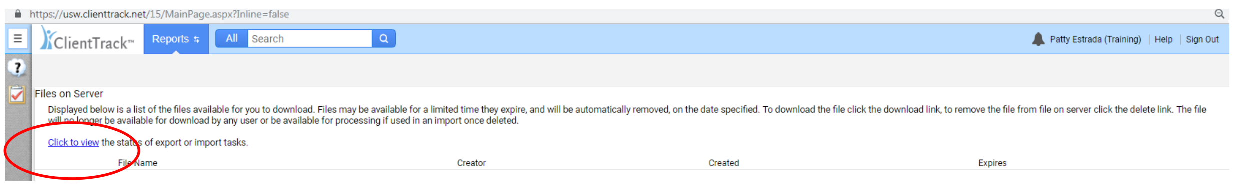


You will be prompted if there are issues or if your export has been queued. ***Note:** It can take up to 20 minutes or longer to run each Export.

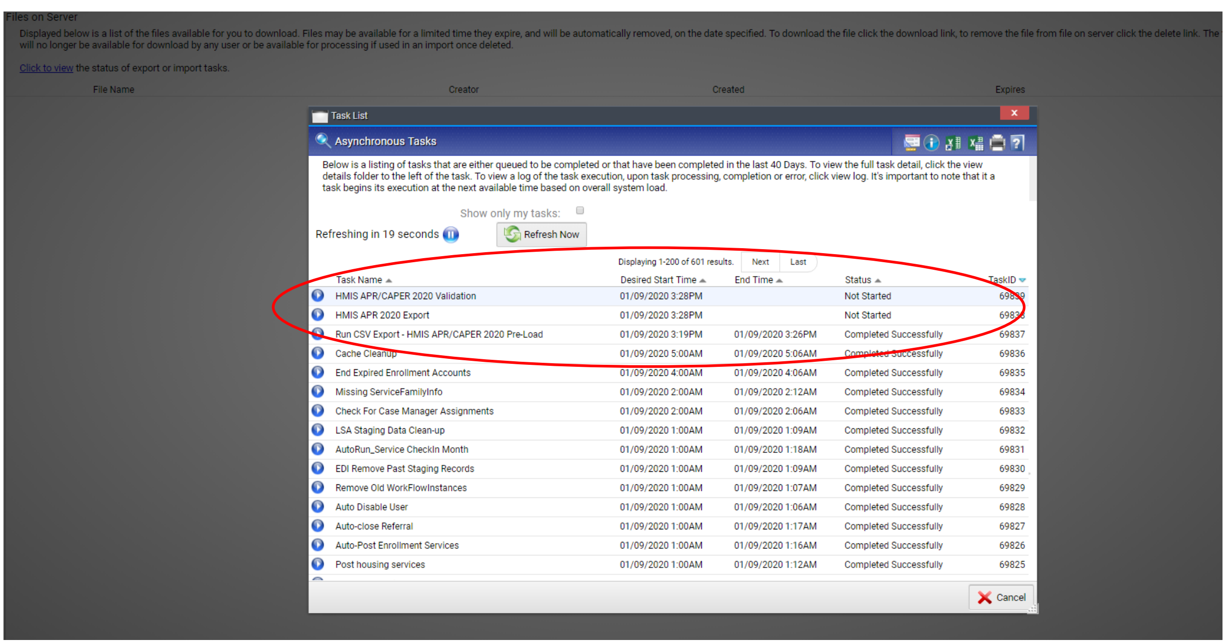


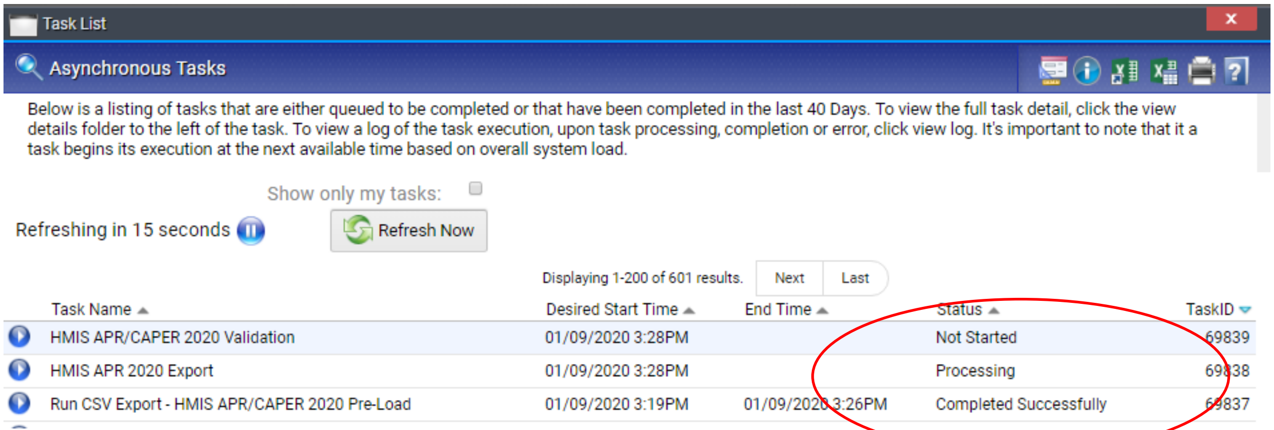


To verify the report is running, click on the “Click to view”



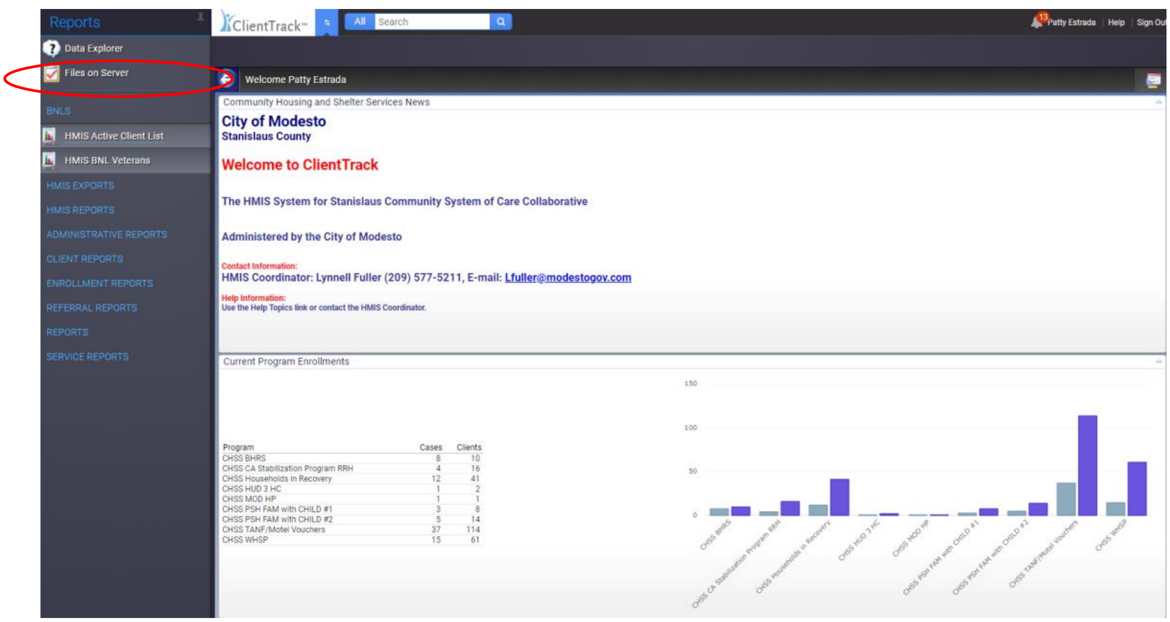
This will bring up the Asynchronous Tasks list. Here you can see the status of your report: Not Started, Processing, or Completed Successfully





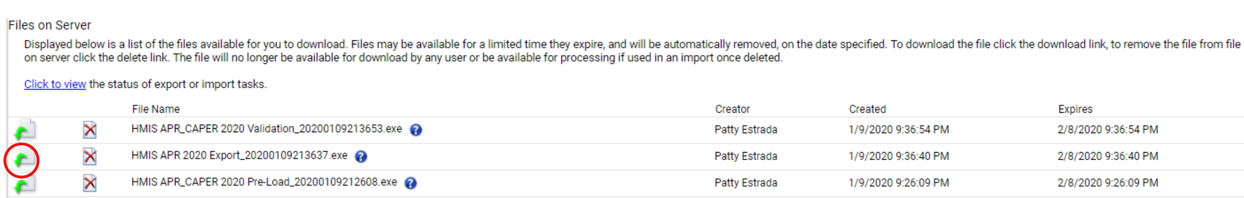
Note: While the report is generating, you may perform other task within other workspaces in ClientTrack, this will not interrupt the report process.

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

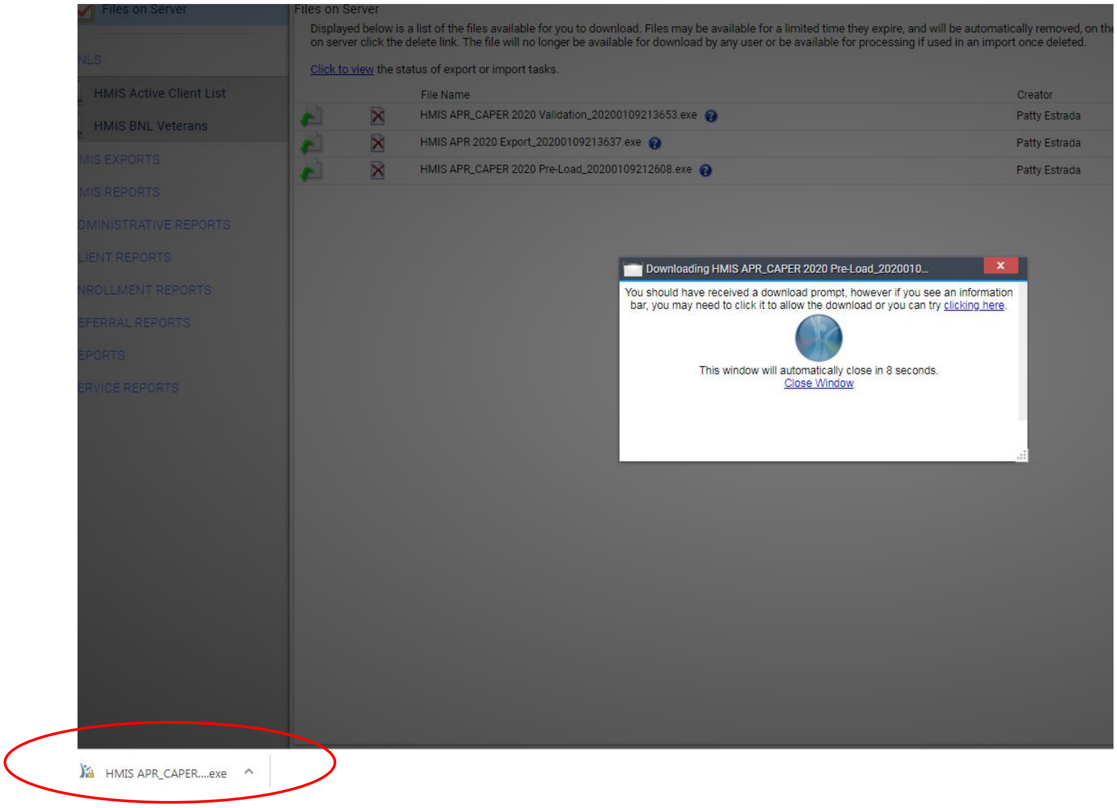


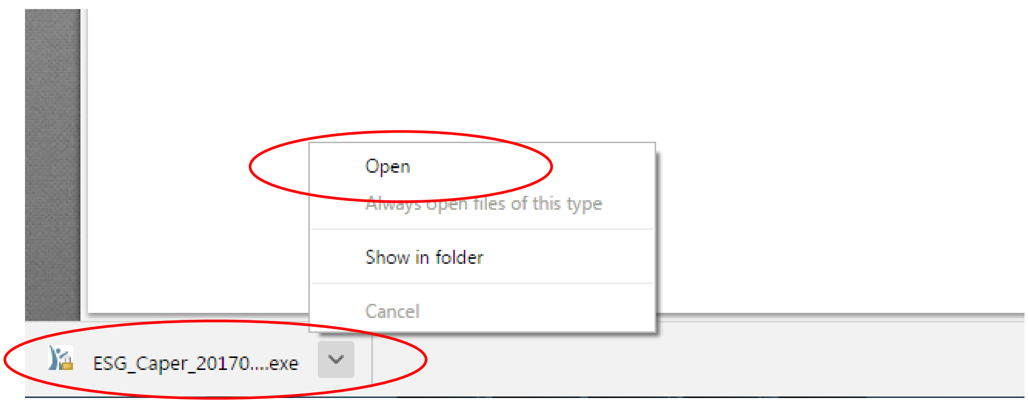
***Note:** Files On Server can aslo be accessed by selecting My Saved Reports>Files on Server

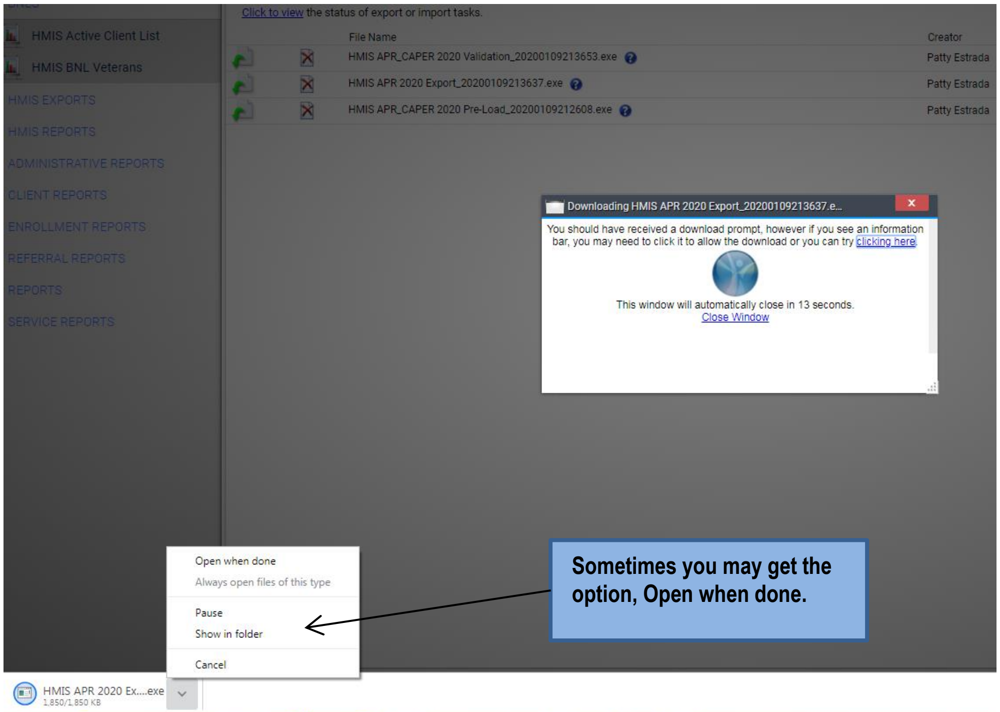
Once the correct report is showing, click on the Green Arrow to Run the Report



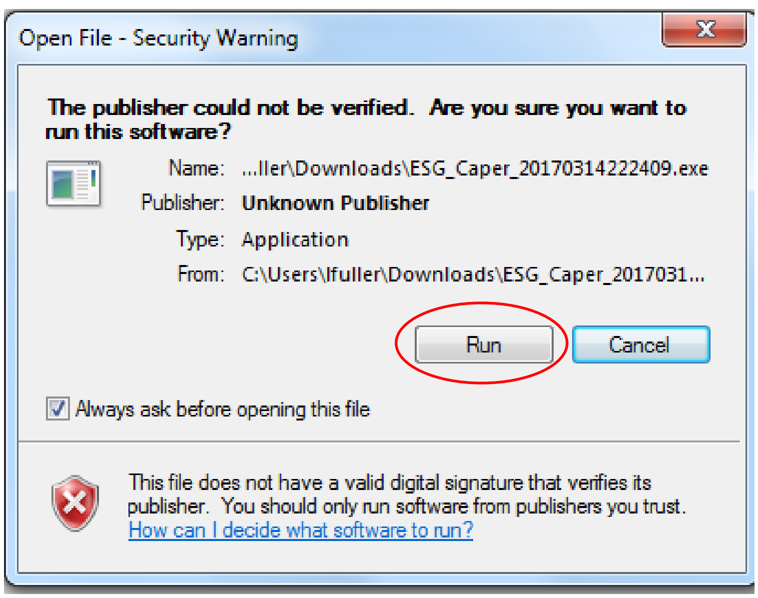
The report will begin to download, once complete, you will click to open the file.



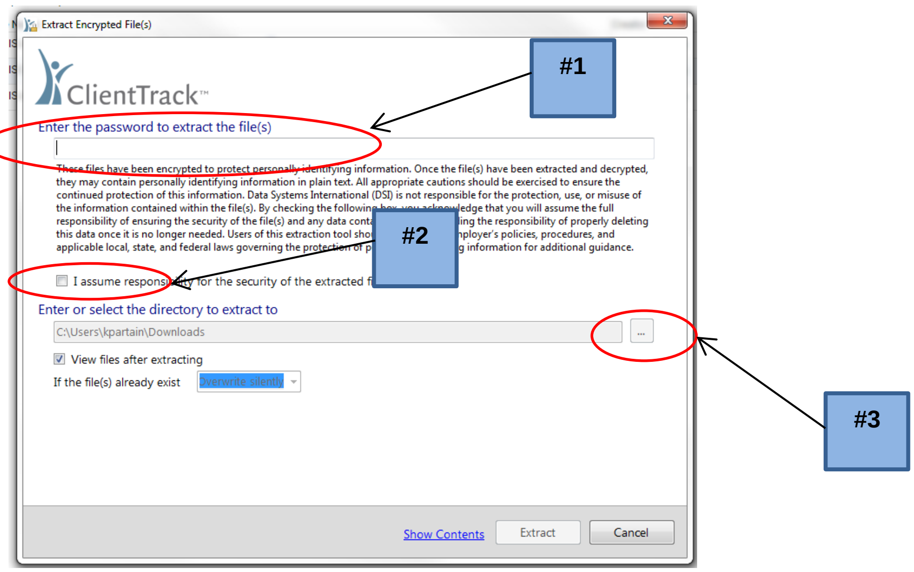




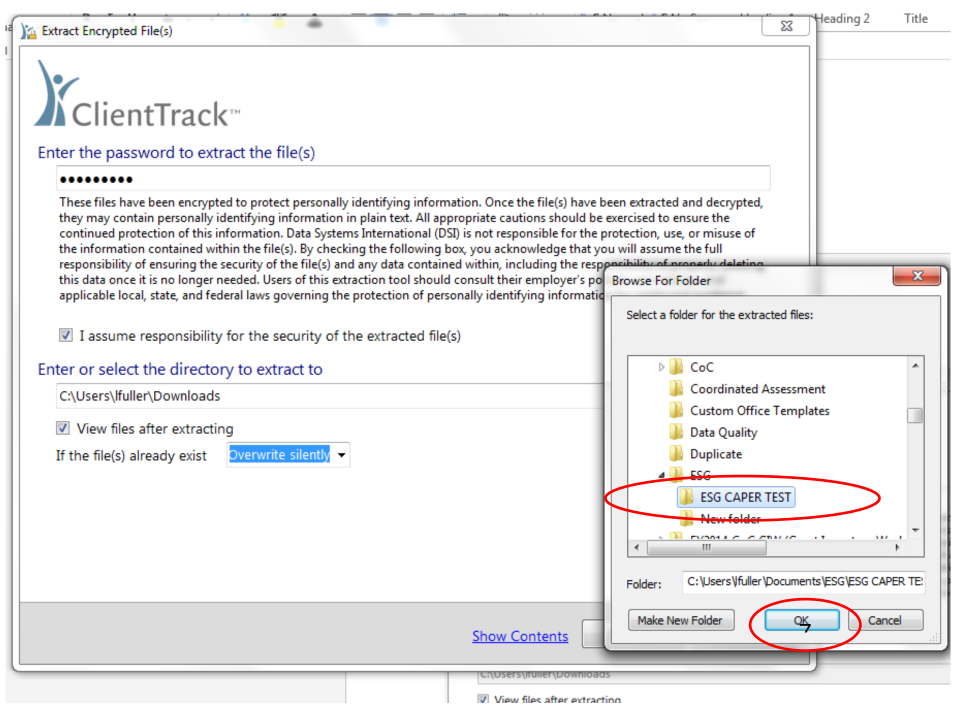
Click on Run, Security Warning, click on "Run"

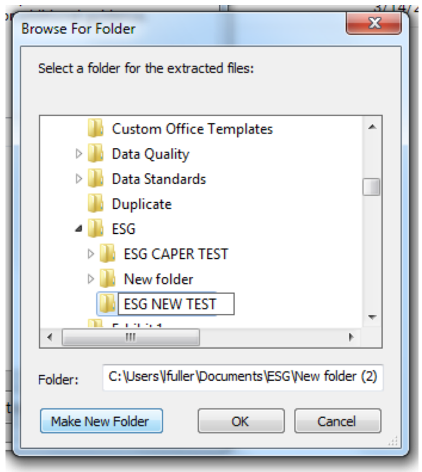


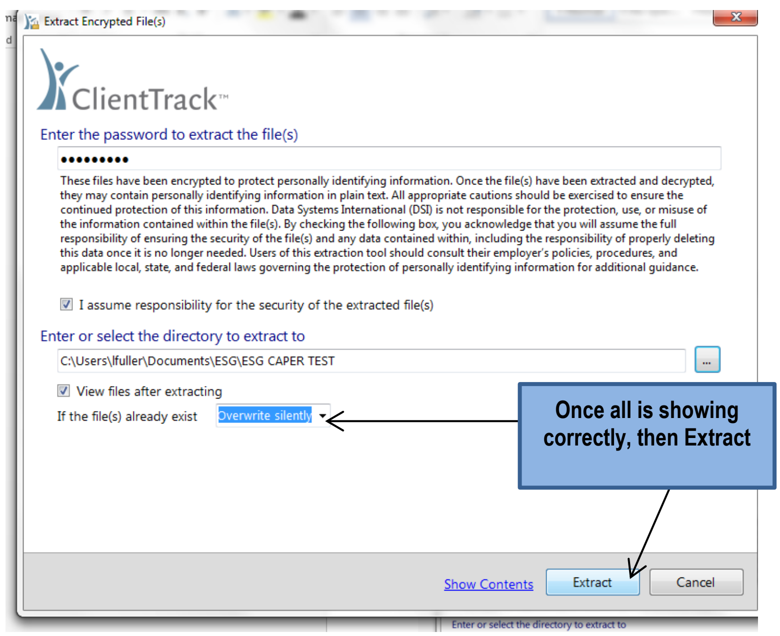
You will then be prompted to:
#1. Put in the Password you created
#2. Mark “I assume responsibility for the security of the extracted file(s)”
#3. Tell the system where you want the extracted file to go before you extract the file

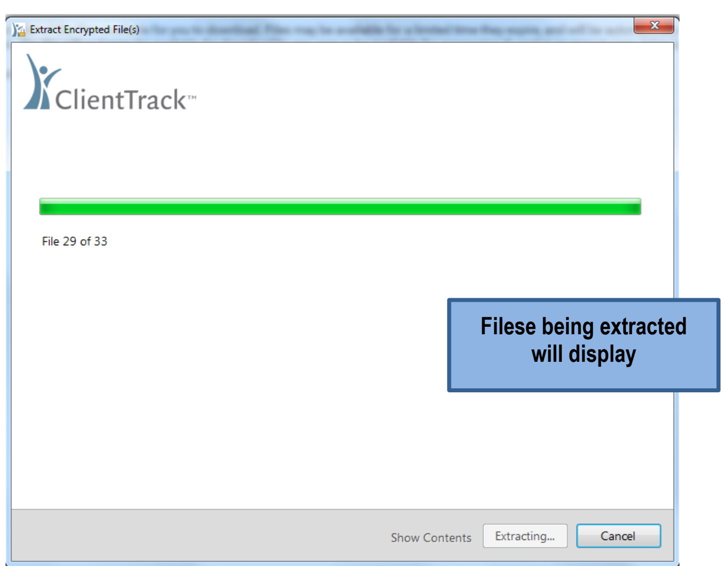


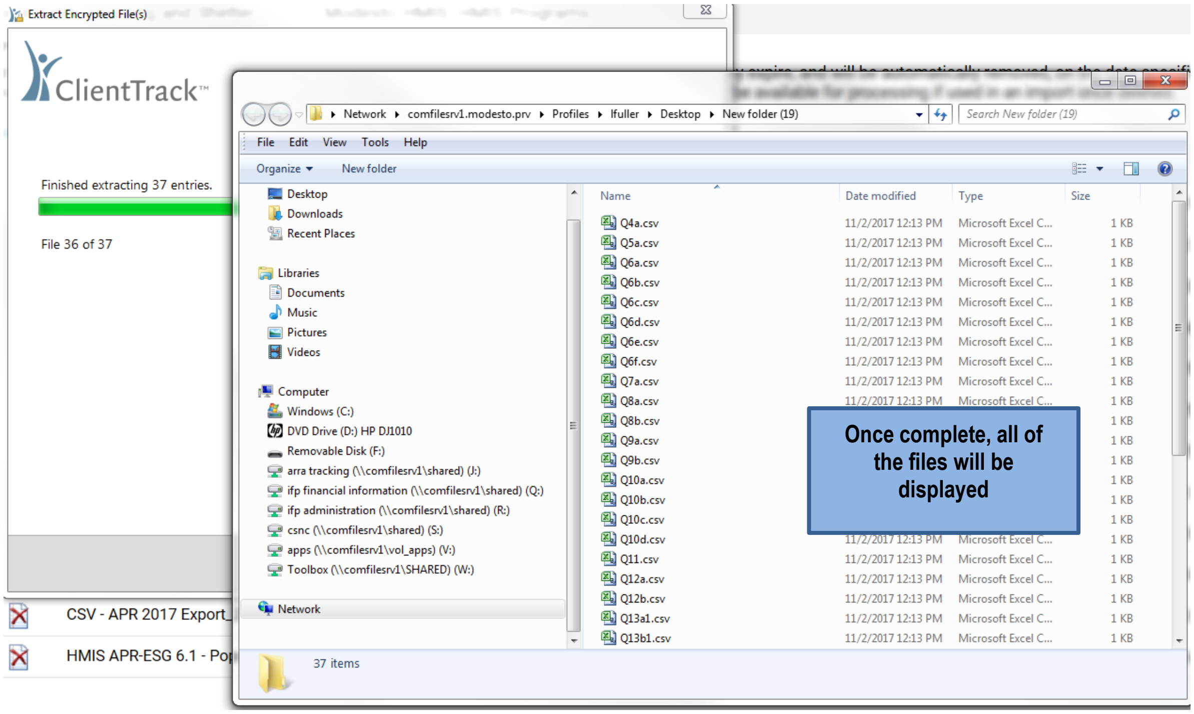
You can create a new folder by clicking **Make New Folder**, then once it is highlighted on the folder you want,click **OK**



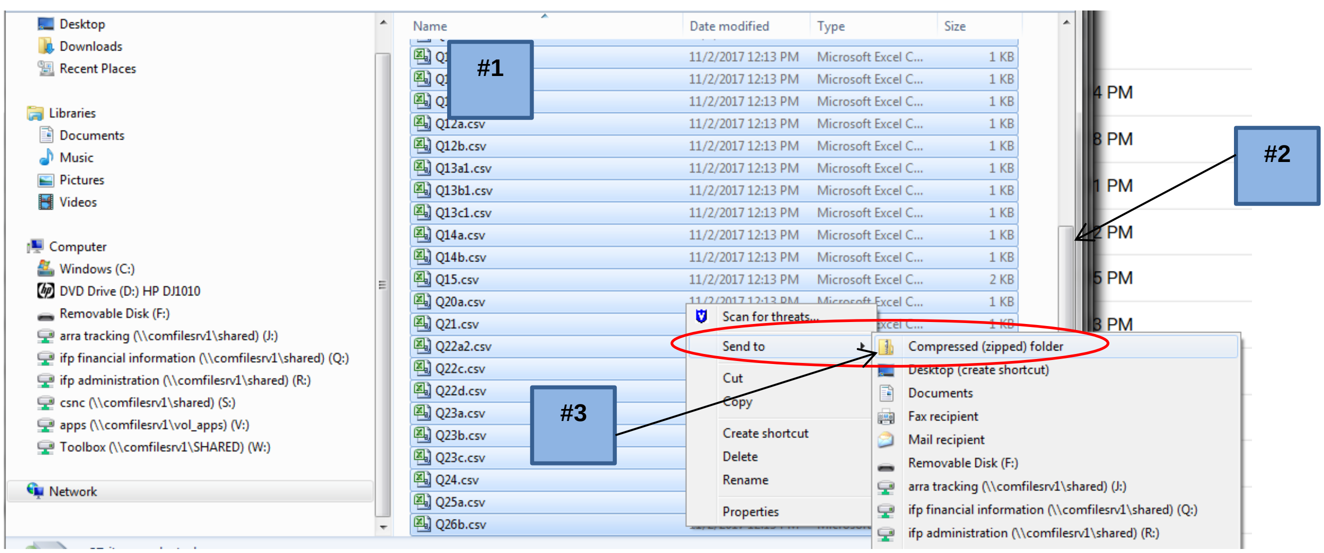

Browse For Folder
Select a folder for the extracted files:
Custom Office Templates
Data Quality
Data Standards
Duplicate
ESG
ESG CAPER TEST
New folder
ESG NEW TEST
Folder:
C:\Users\fuller\Documents\ESG\New folder (2)
Make New Folder
OK
Cancel

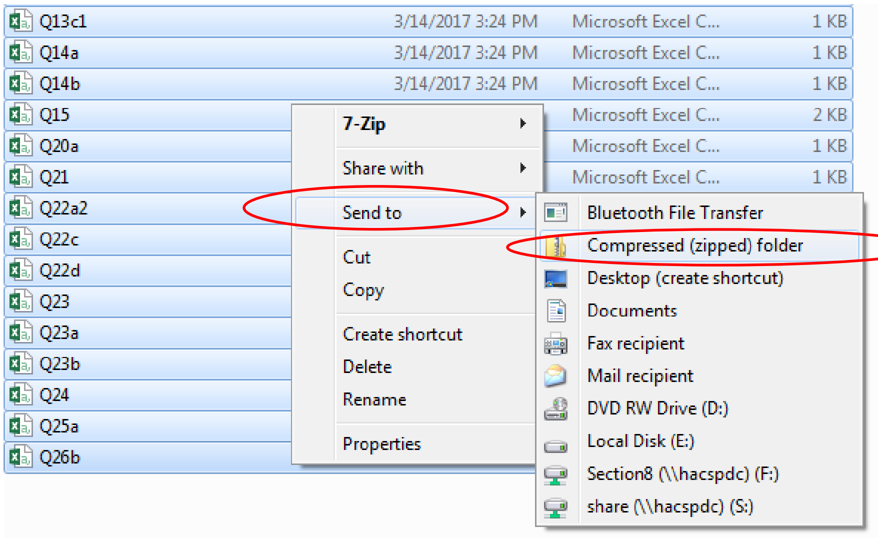

Extract Encrypted File(s)
ClientTrack
Enter the password to extract the file(s)
These files have been encrypted to protect personally identifying information. Once the file(s) have been extracted and decrypted, they may contain personally identifying information in plain text. All appropriate cautions should be 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 responsibility of properly deleting this data once it is no longer needed. Users of this extraction tool should consult their employer's policies, procedures, and applicable local, state, and federal laws governing the protection of personally identifying information for additional guidance.
I assume responsibility for the security of the extracted file(s)
Enter or select the directory to extract to
C:\Users\fuller\Documents\ESG\ESG CAPER TEST
View files after extracting
If the file(s) already exist
Overwrite silently
Once all is showing correctly, then Extract
Show Contents
Extract
Cancel

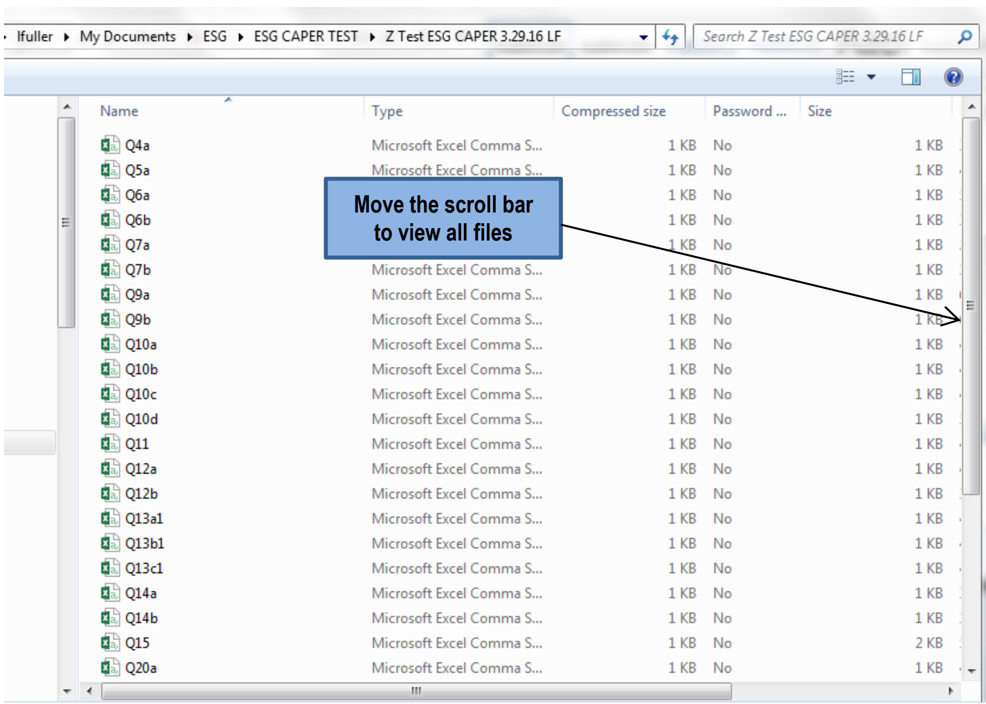

Extract Encrypted File(s)
ClientTrack
File 29 of 33
Filese being extracted will display
Show Contents
Extracting...
Cancel



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



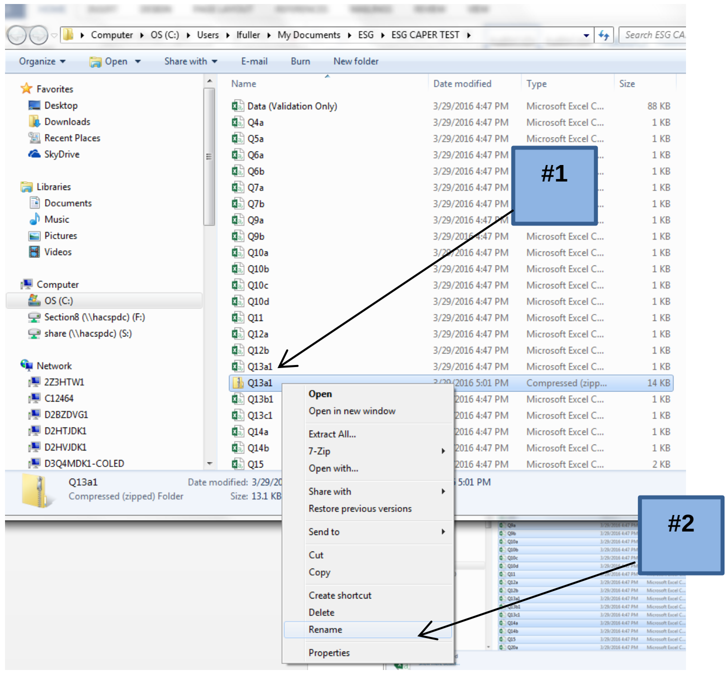

Q13c1 3/14/2017 3:24 PM Microsoft Excel C... 1 KB
Q14a 3/14/2017 3:24 PM Microsoft Excel C... 1 KB
Q14b 3/14/2017 3:24 PM Microsoft Excel C... 1 KB
Q15 Microsoft Excel C... 2 KB
Q20a Microsoft Excel C... 1 KB
Q21 Microsoft Excel C... 1 KB
Q22a2
Q22c
Q22d
Q23
Q23a
Q23b
Q24
Q25a
Q26b
7-Zip
Share with
Send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


lfuller My Documents ESG ESG CAPER TEST Z Test ESG CAPER 3.29.16 LF
Search Z Test ESG CAPER 3.29.16 LF
Name Type Compressed size Password ... Size
Q4a Microsoft Excel Comma S... 1 KB No 1 KB
Q5a
Q6a
Q6b
Q7a
Q7b
Q9a
Q9b
Q10a
Q10b
Q10c
Q10d
Q11
Q12a
Q12b
Q13a1
Q13b1
Q13c1
Q14a
Q14b
Q15
Q20a
Move the scroll bar
to view all files

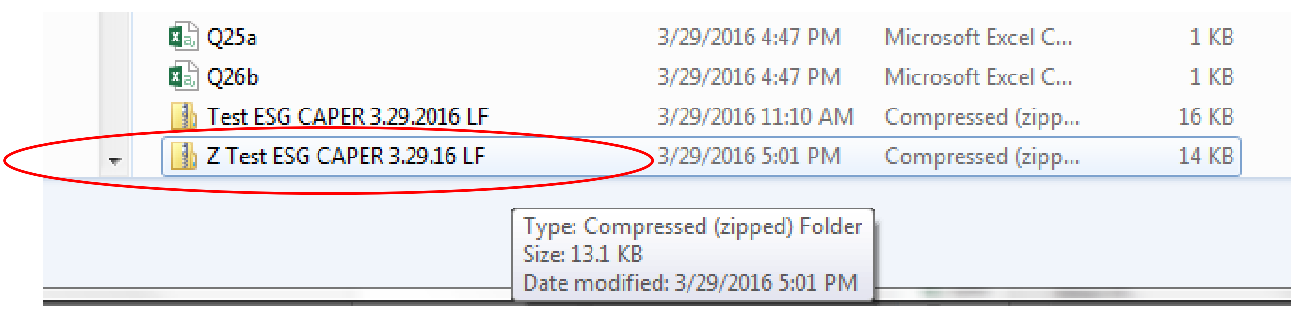
Your file will be zipped but you will have to rename the file.

#1. Highlighting the file, right click

#2. Rename



Once you rename your file it will move into Alphabetical Order



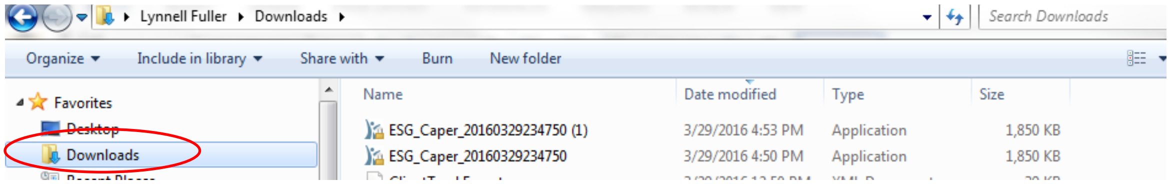
Once file is zipped you can then email by going to your Documents Library to find the file and attach to email **DO NOT OPEN ZIP FILE** it will change the format & not upload correctly

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

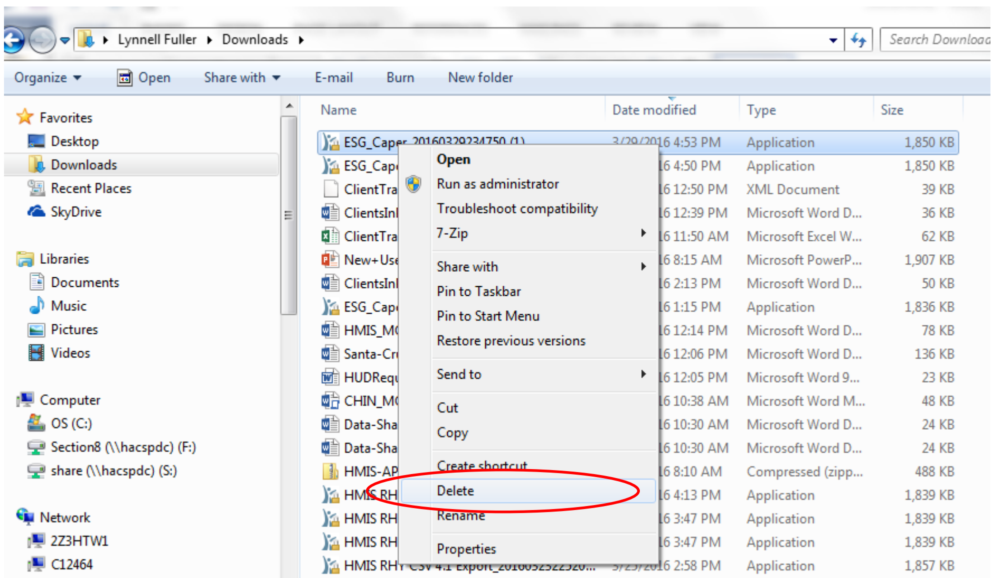
https://www.hudexchange.info/resource/4696/hmis-programming-specifications/

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

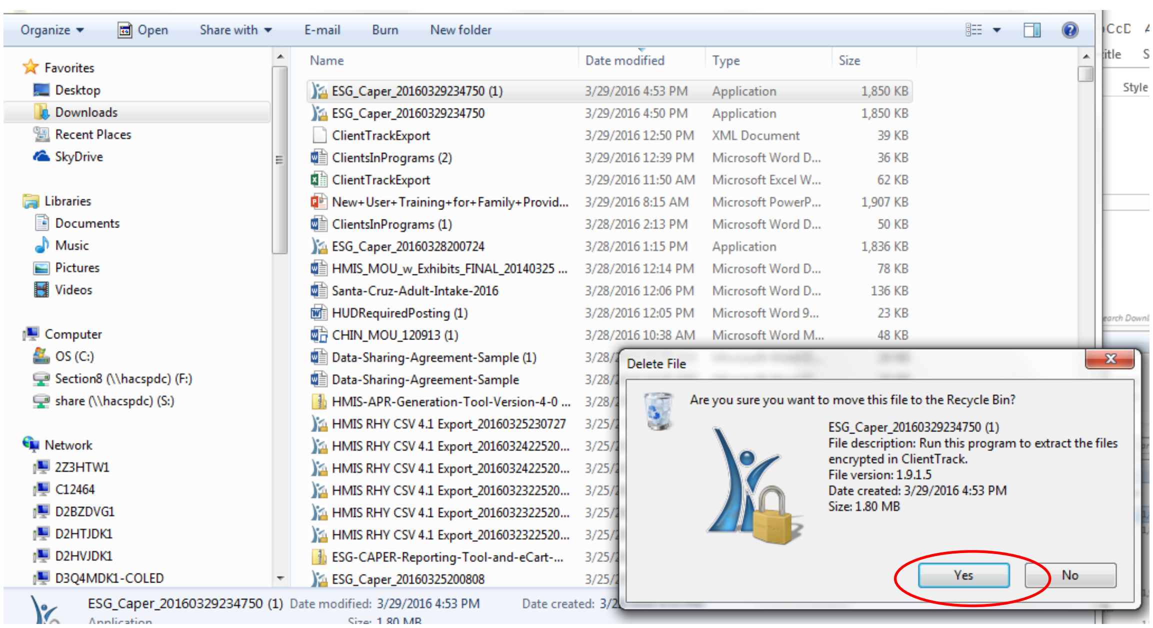
Bring up your Downloads



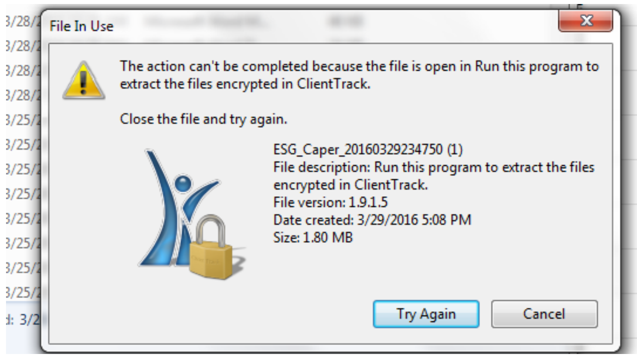
All of your downloaded files will appear, highlight the ESG CAPER, right click, and delete

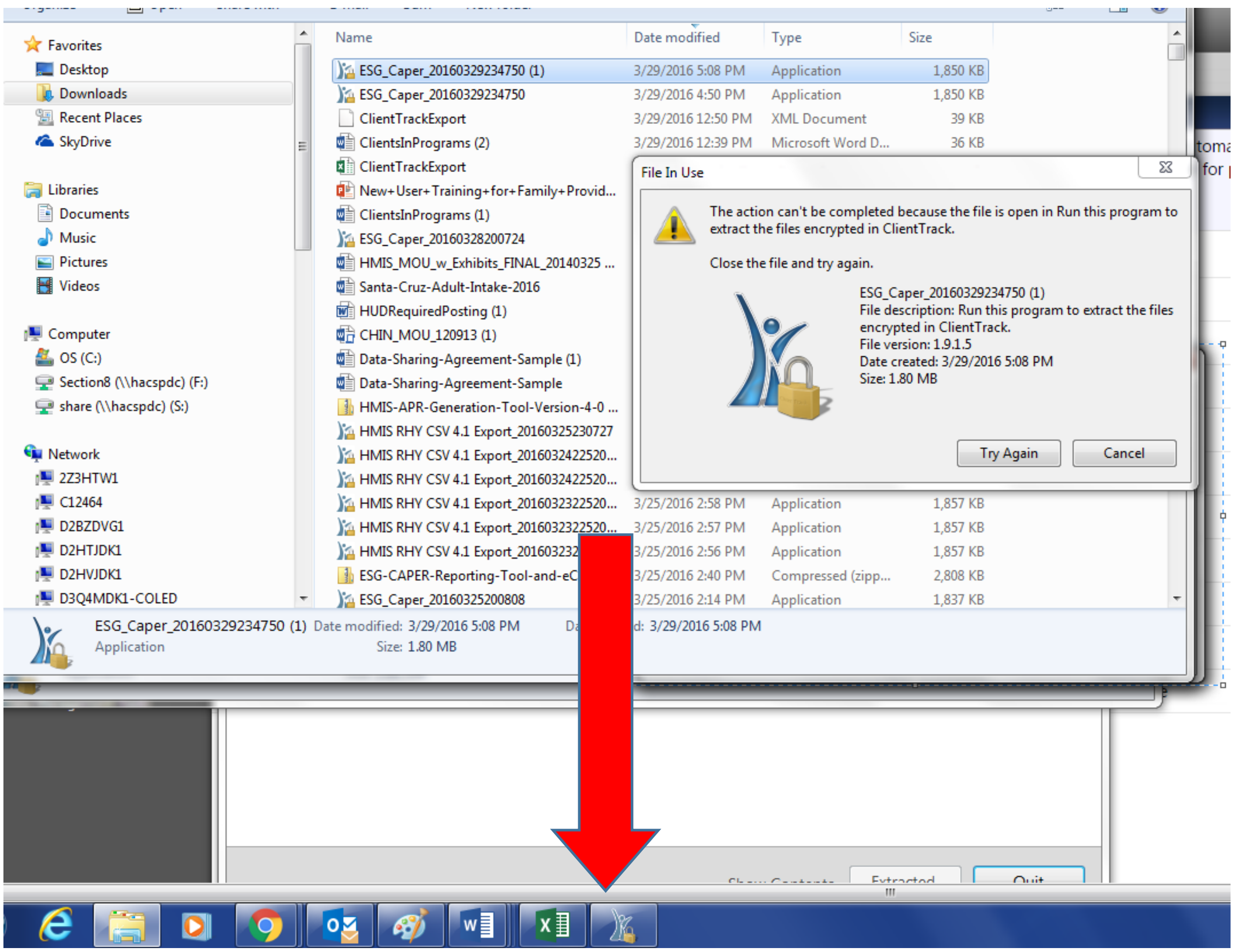


It will ask if you are sure you want to move the file(s) to the Recycle Bin. Select Yes.

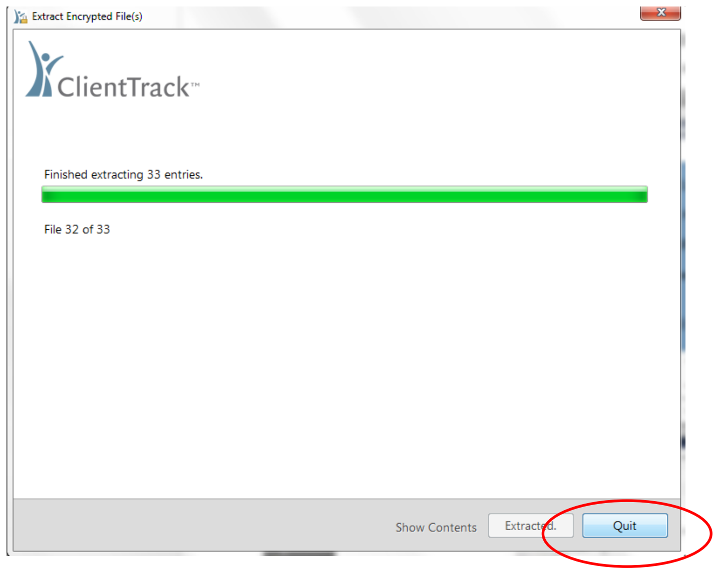


You may get an error that the action can't be completed because the file is open in Run, you will have to click on the window tab at the bottom of your computer to the bring up the locked running file

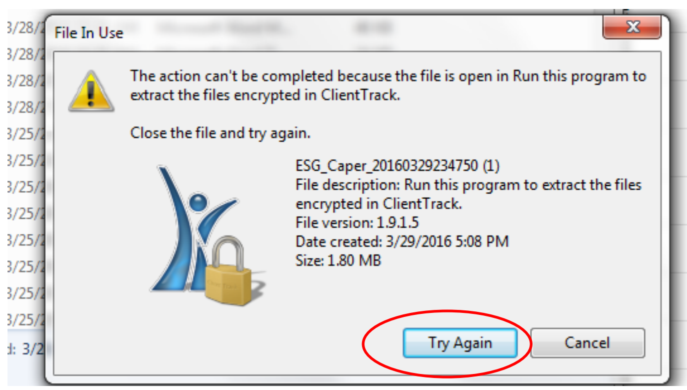




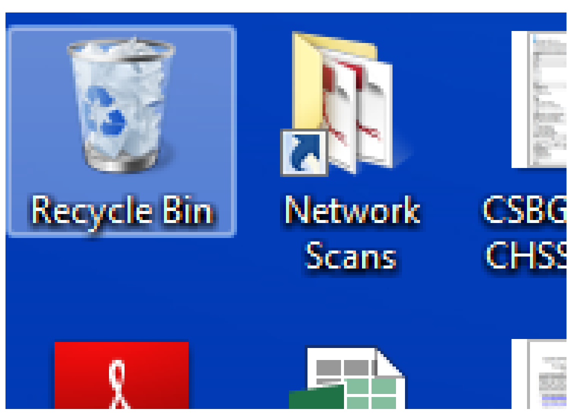
Once the Extrac Encrupted Files screen is showing click on Quit



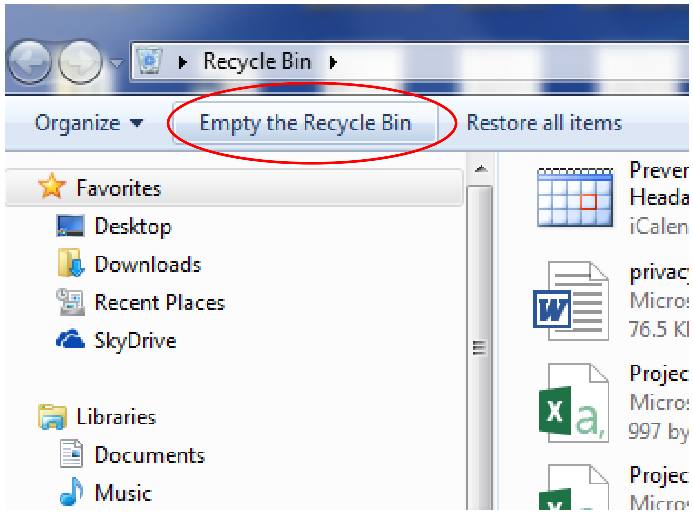
Then Try Again



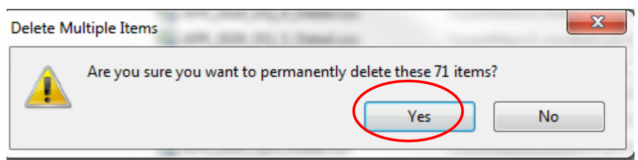
Go to your Recylce Bin on your computer desktop



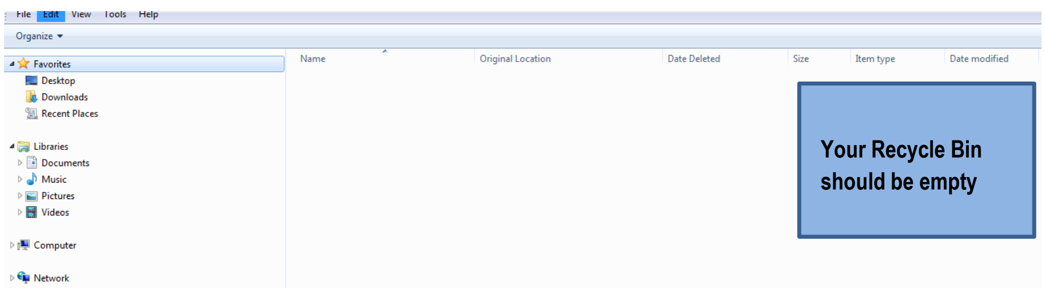
Select Empty the Recycle Bin



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



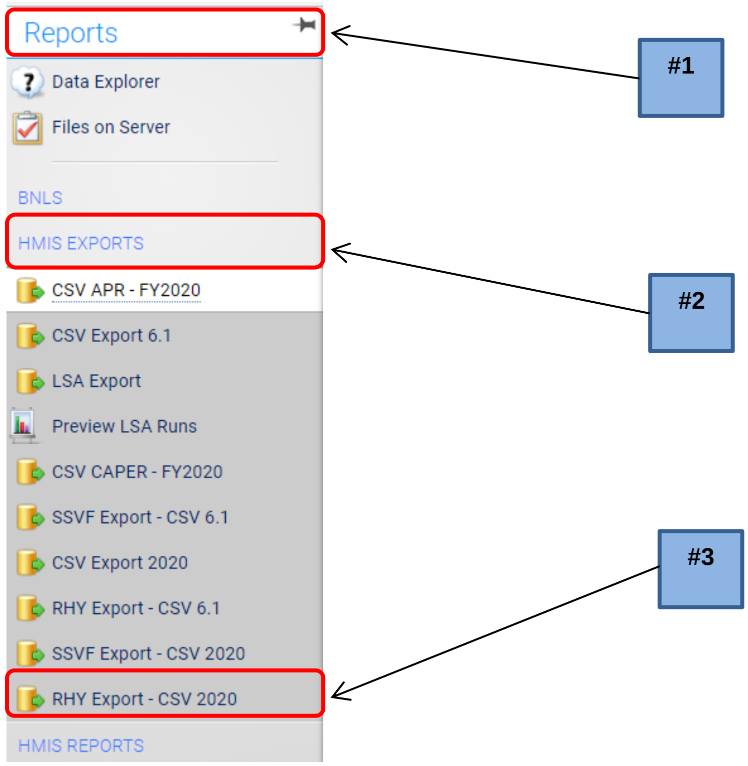
When you have completed the process, your Recycle Bin should be empty



You have completed running the ESG CAPER Report!

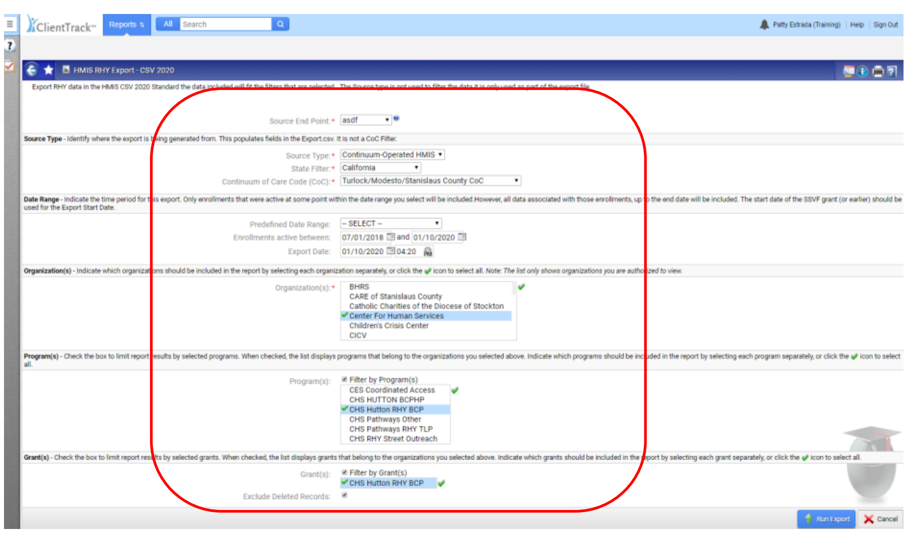
RHY Export

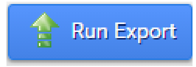
The export is located in the Reports Workspace: Menu **Reports>HMIS Exports**>**RHY Export 2020**



When the report is lauched, the system confirms

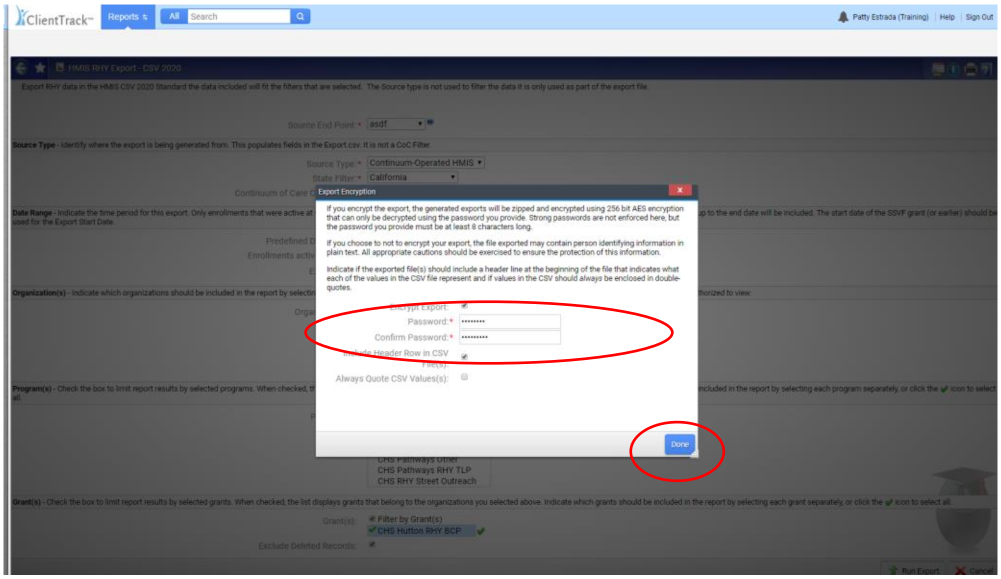
Add the **Source End Point**, **Source Type**, and **Enrollment active between Dates**, which are from the start of the grant period, which will default to the date that you are running the report, DO NOT change the Export Date as the date must be the same date that you upload the data, the **Organization** 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.



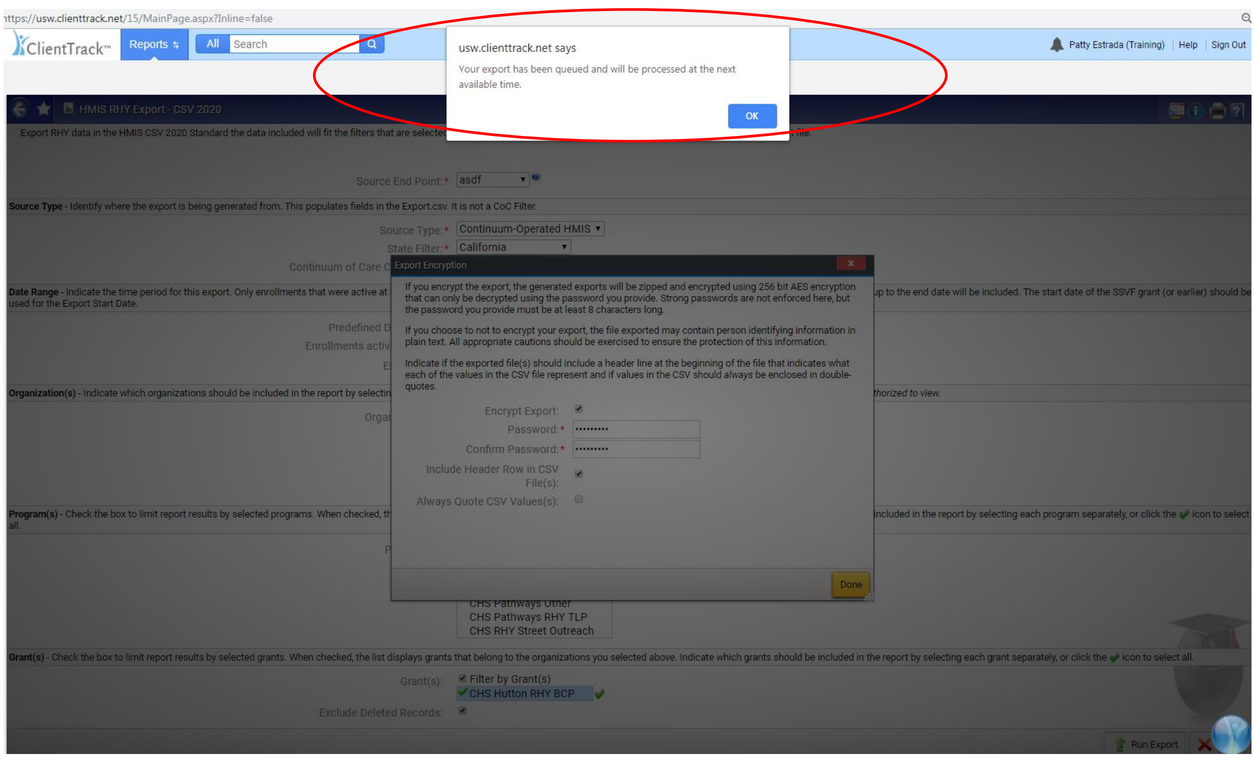


<u>Please NOTE: It can take up to 20 minutes to run each Export</u>

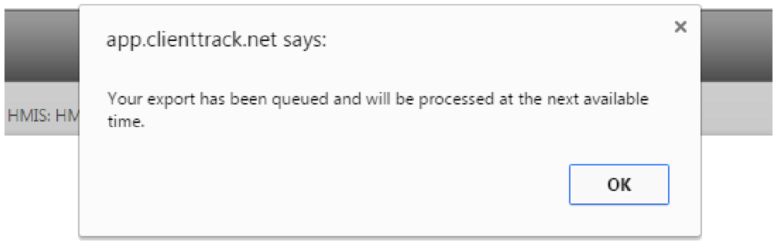
You will then have to create a Password, once confirmed, click Done

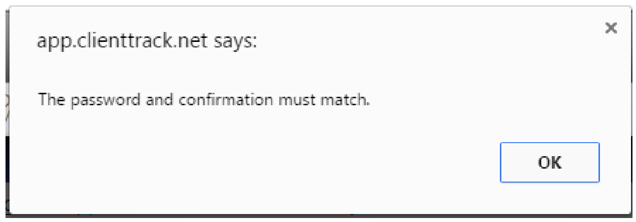


A window will appear giving you the status of your request.

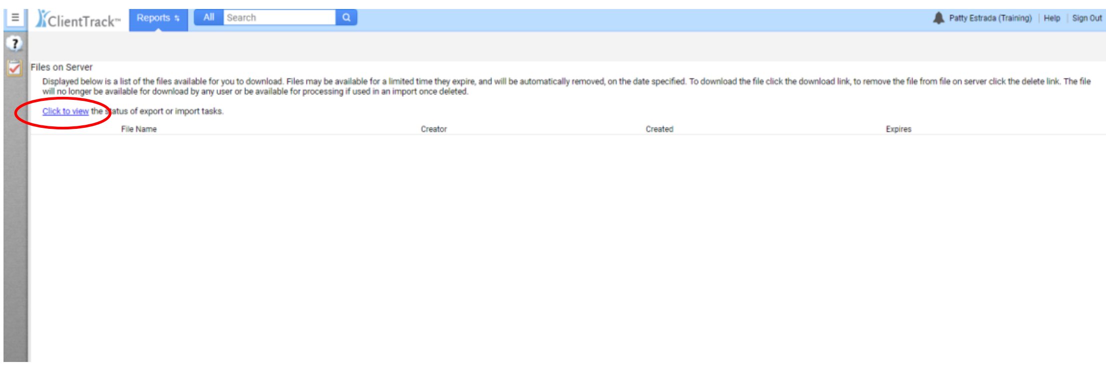


You will be prompted that your export has been queued or if there are any issues.

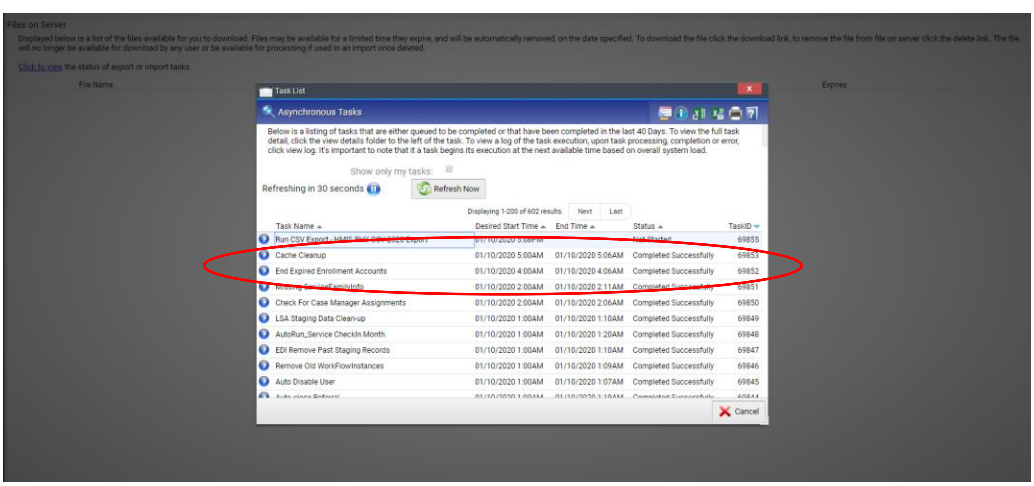




To check if it is running click on the “Click to view”

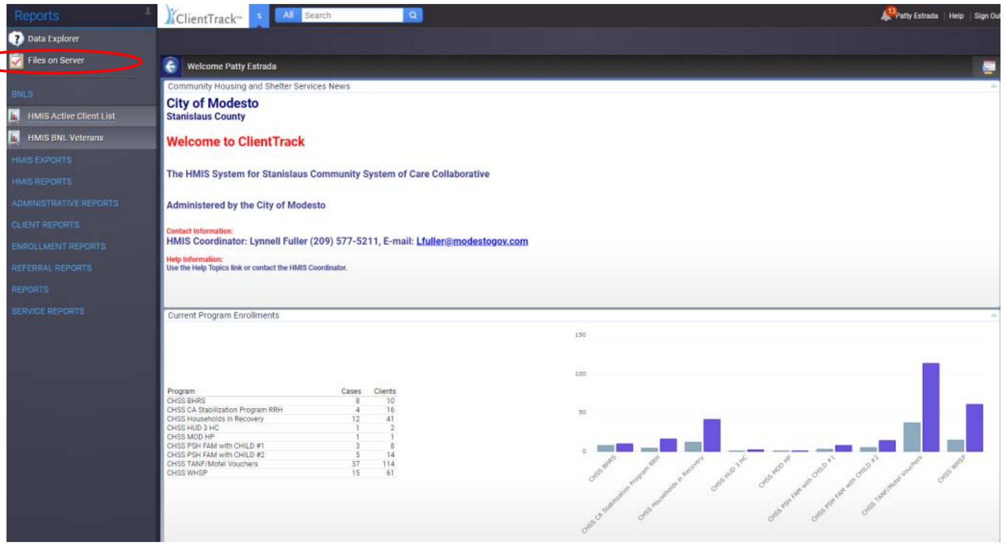


This will bring up the Asynchronous Tasks list. Here you can see the status of your report: Not Started, Processing, or Completed Successfully

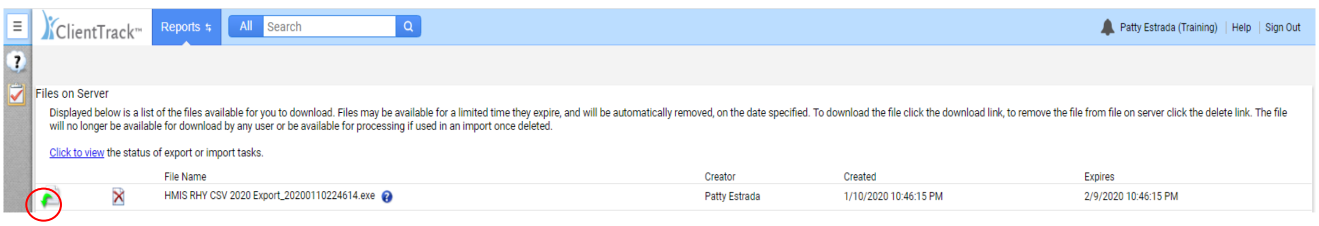


Note: While the report is generating, you may perform other task within other workspaces in ClientTrack, this will not interrupt the report process.

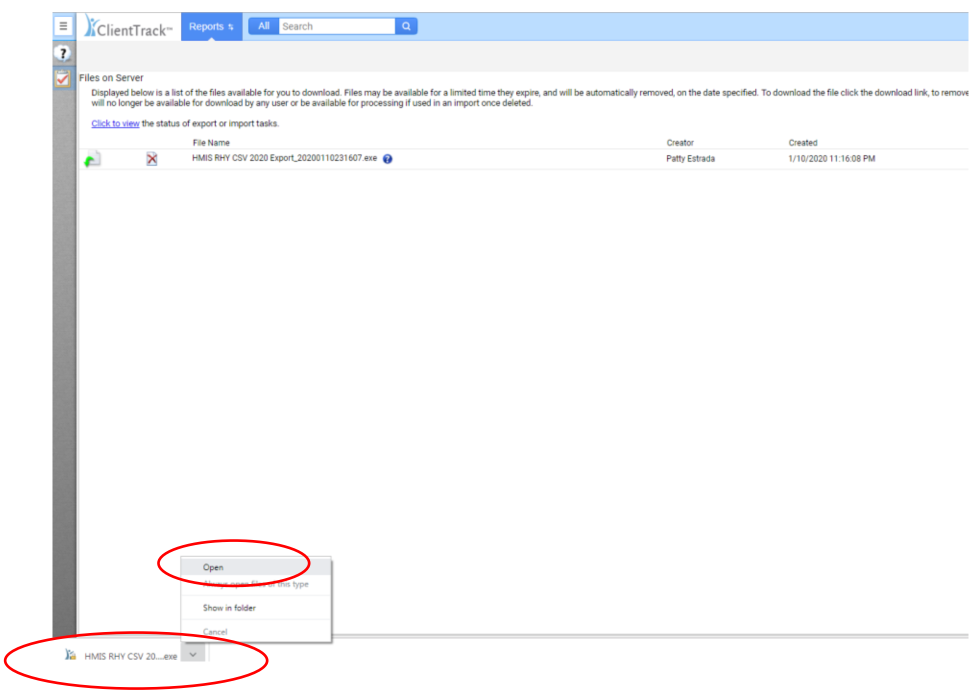
To check if your report is ready, you can find it by selecting:**Reports Workspace> Reports>Files on Server**



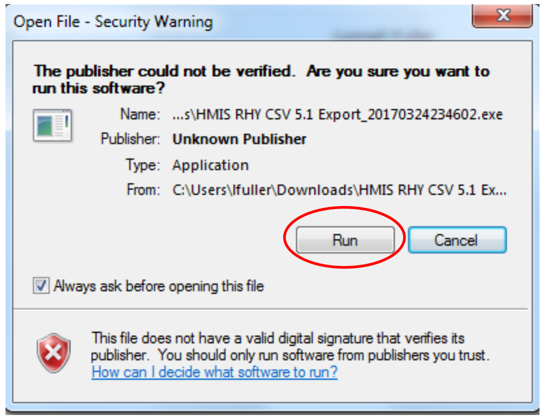
From the Files on Server, click on the green download arrow



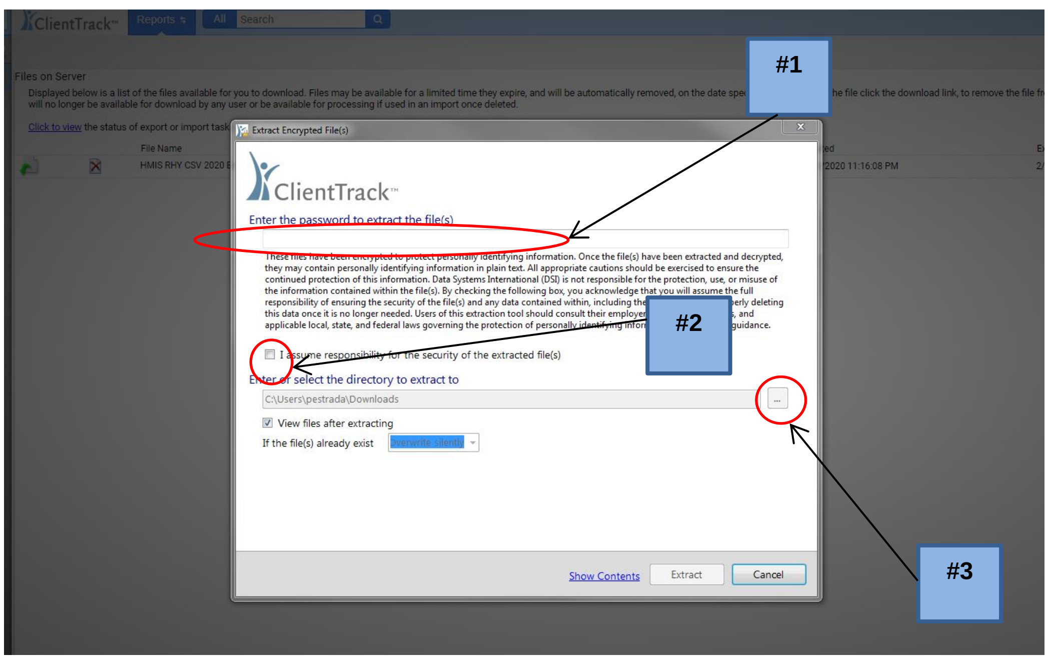
The Report will download, click on open

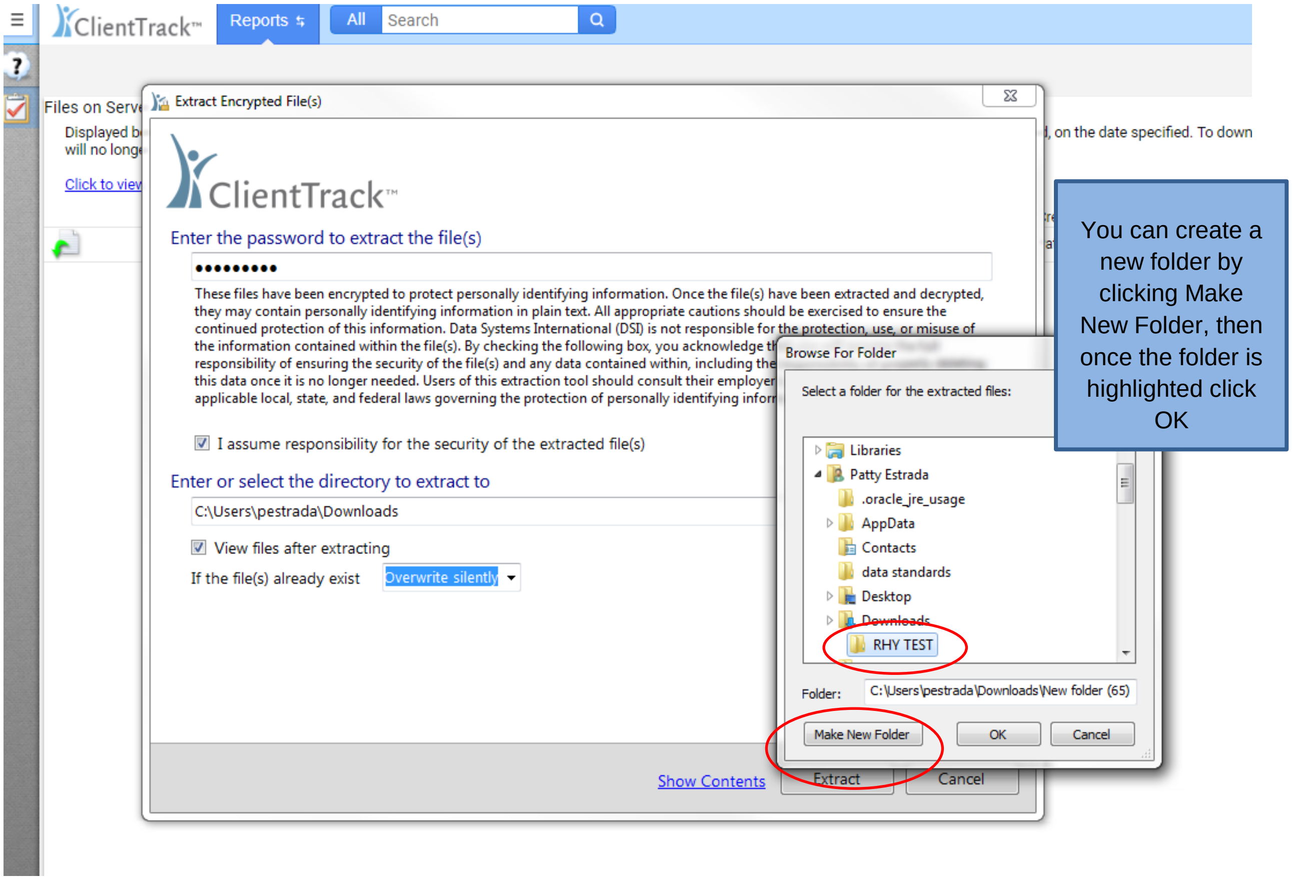


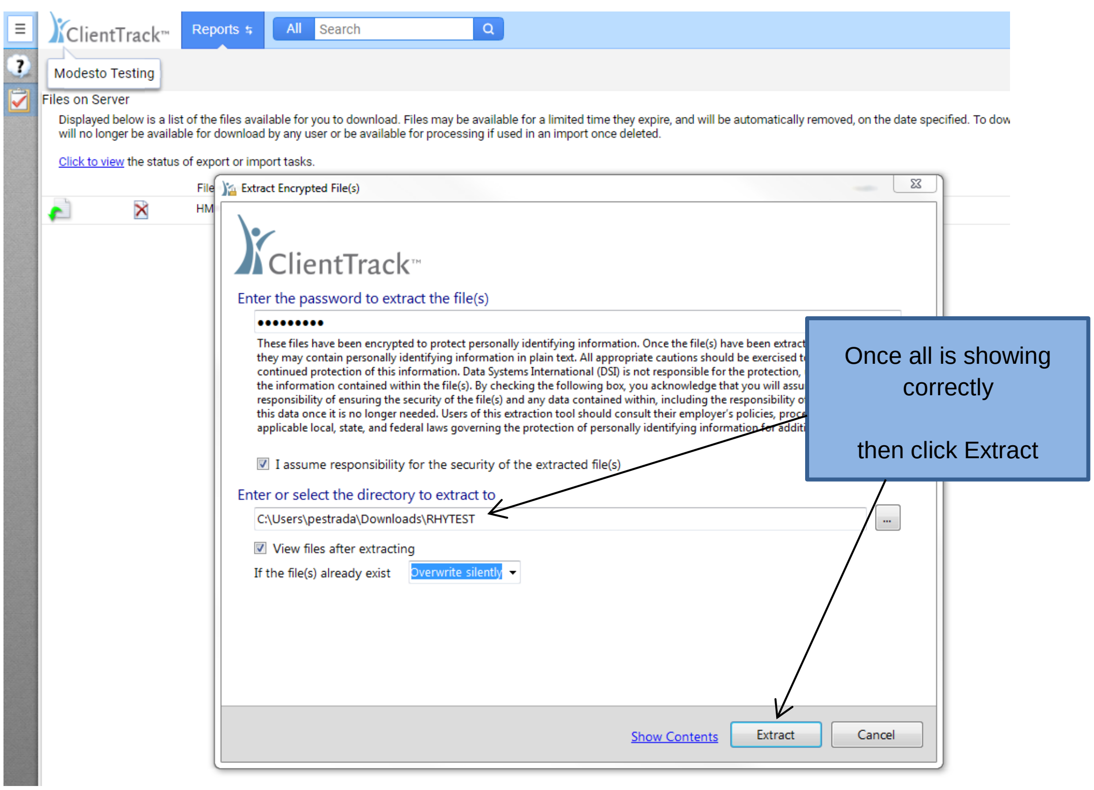
If you get a “Security Warning” click on Run

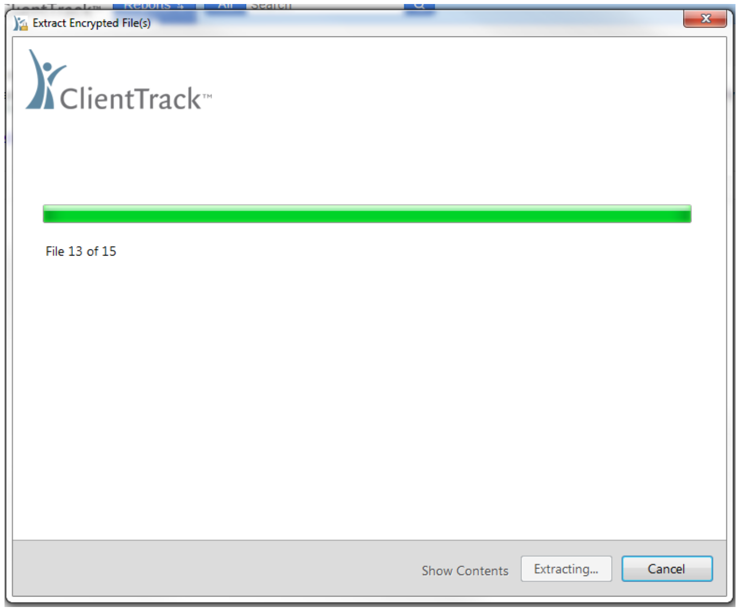


You will then be prompted to **1.** Put in the Password you created, **2.** Mark “I assume responsibility for the security of extracted files, and **3.** Tell the system where you want the extracted file to go before you extract the file




Extract Encrypted File(s)
ClientTrack
Enter the password to extract the file(s)
I assume responsibility for the security of the extracted file(s)
Enter or select the directory to extract to
C:\Users\pestrada\Downloads
View files after extracting
If the file(s) already exist
Overwrite silently
Browse For Folder
Select a folder for the extracted files:
Libraries
Patty Estrada
.oracle_jre_usage
AppData
Contacts
data standards
Desktop
Downloads
RHY TEST
Folder:
C:\Users\pestrada\Downloads\New folder (65)
Make New Folder
OK
Cancel
Show Contents
Extract
Cancel
You can create a new folder by clicking Make New Folder, then once the folder is highlighted click OK


ClientTrack
Reports
All
Search
Modesto Testing
Files on Server
Extract Encrypted File(s)
Enter the password to extract the file(s)
I assume responsibility for the security of the extracted file(s)
Enter or select the directory to extract to
C:\Users\pestrada\Downloads\RHYTEST
View files after extracting
If the file(s) already exist
Overwrite silently
Show Contents
Extract
Cancel
Once all is showing correctly
then click Extract



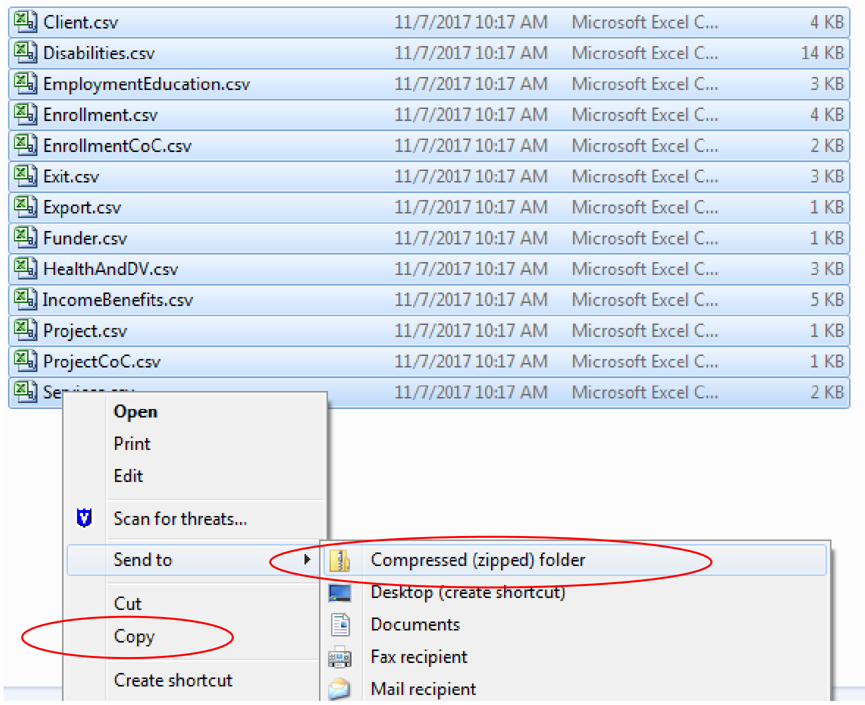
Files will be extracted

All 15 files will be visible

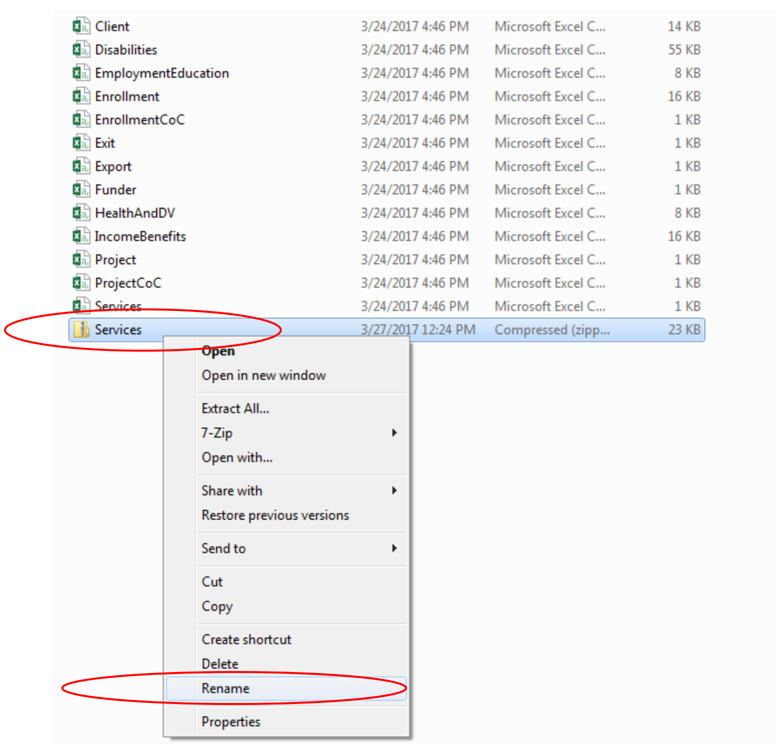
Name	Date modified	Type	Size
Client.csv	1/10/2020 3:16 PM	Microsoft Excel C...	22 KB
CurrentLivingSituation.csv	1/10/2020 3:16 PM	Microsoft Excel C...	1 KB
Disabilities.csv	1/10/2020 3:16 PM	Microsoft Excel C...	47 KB
EmploymentEducation.csv	1/10/2020 3:16 PM	Microsoft Excel C...	8 KB
Enrollment.csv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

To create a zipped file:

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

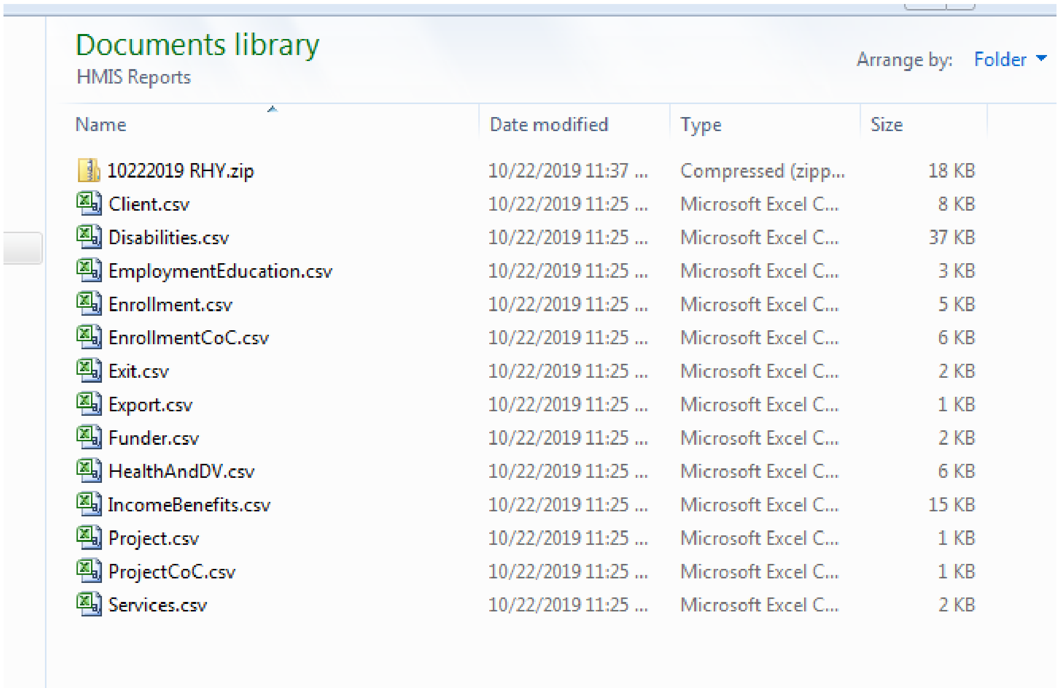


Your file will show zipped by you will have to rename it by **1.** Highlighting the file and **2.** Right-clicking and selecting Rename

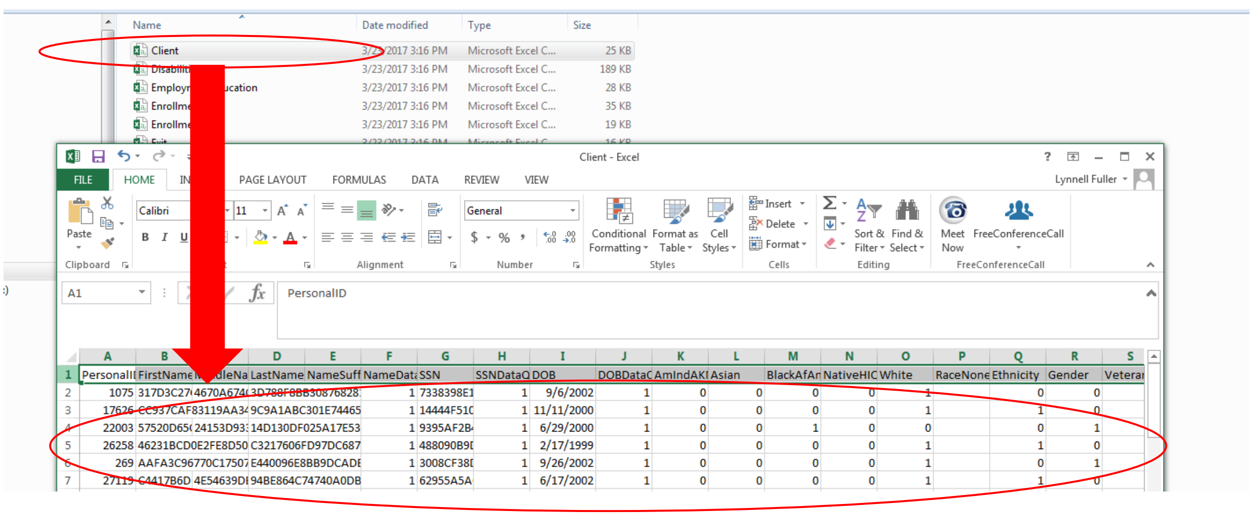


Once file is zipped you can then email by going to you Documents Library to find the file and attach to email. DO NOT OPEN ZIP FILE as it will change the format and not upload correctly. To view the data, use the unzipped files.

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



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

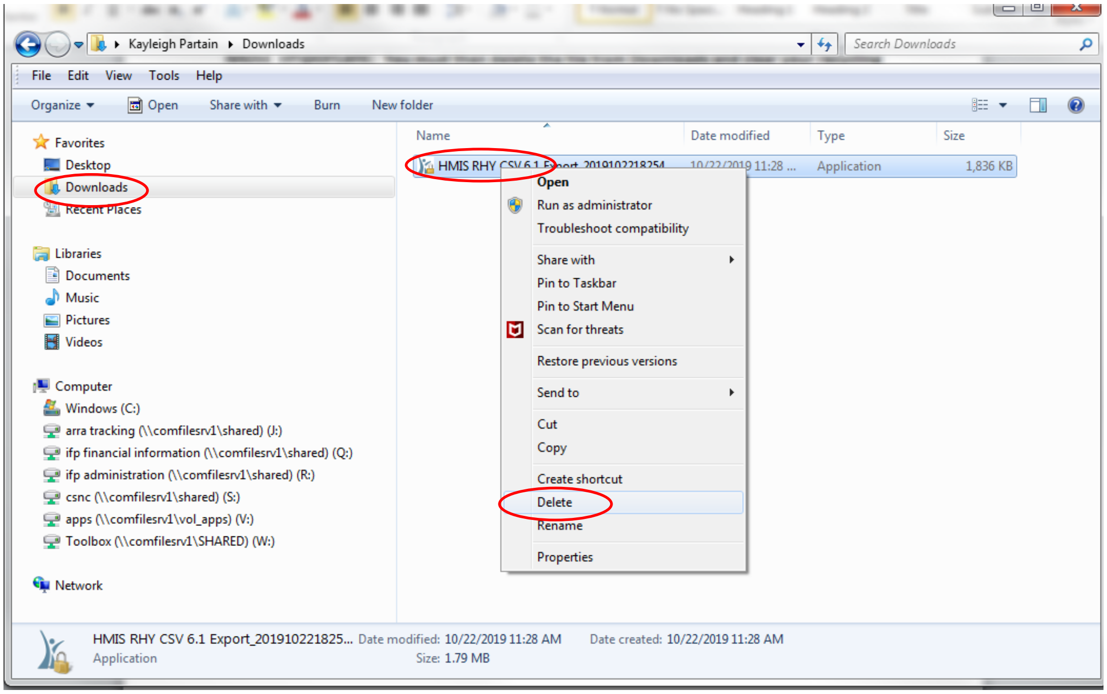


REFER TO YOUR HMIS CSV FORMAT SPECIFICATIONS FOR DATA GUIDE

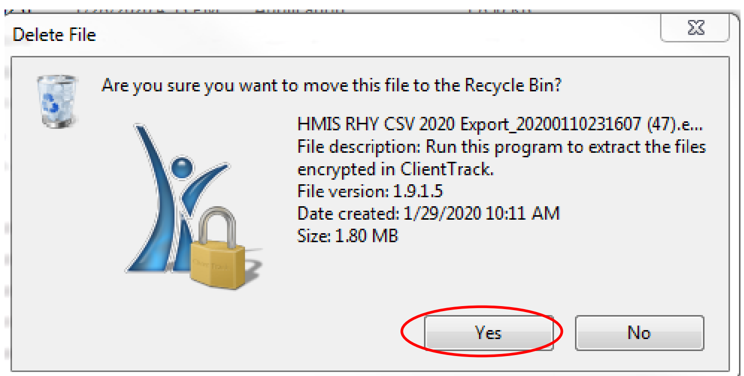
https://hudhdx.info/Resources/Vendors/HMIS%20CSV%20Specifications%20FY2020%20v1.1.pdf

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

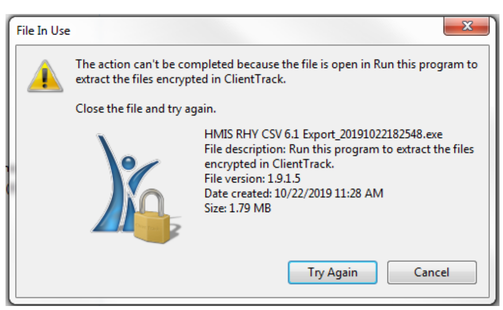
Bring up your Downloads. All of your downloaded files will appear, highlight the **RHY 6.1**, right click, and **Delete**



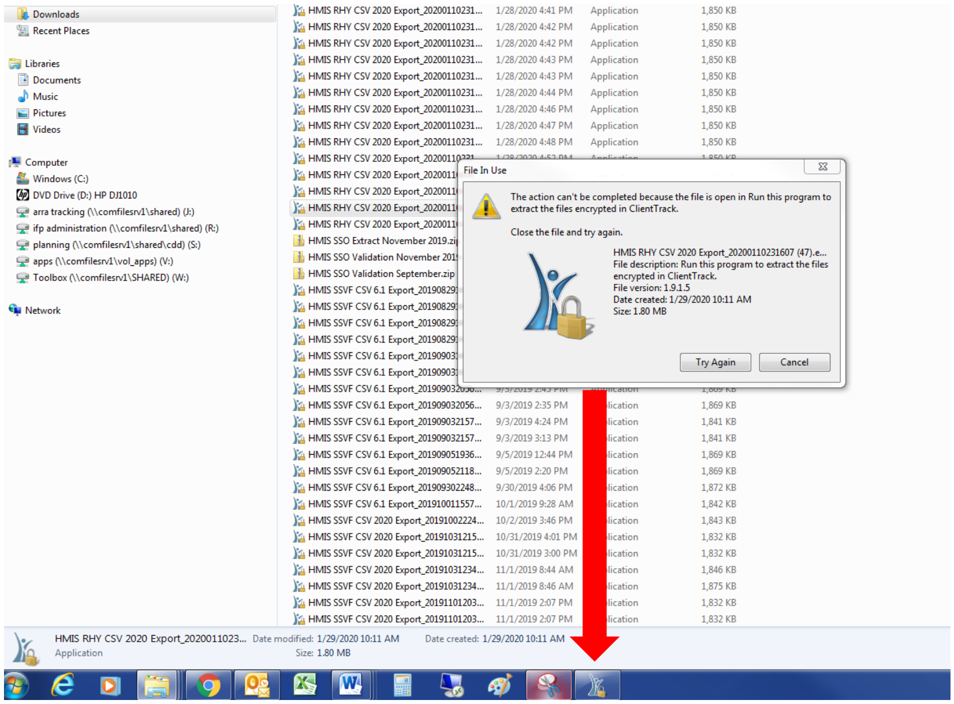
It will ask if you are sure you want to move this file to the Recycle Bin. Select **Yes**



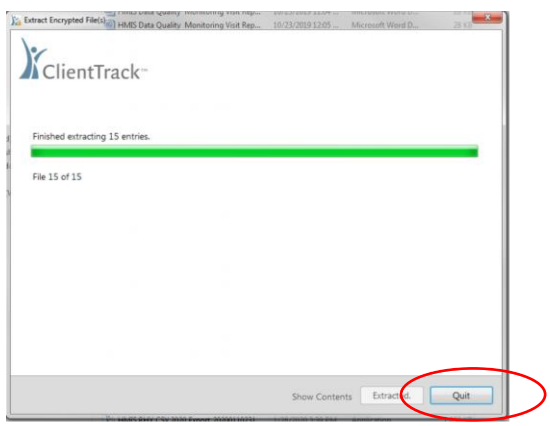
You may get an error that the action can't be completed because the file is open in Run.



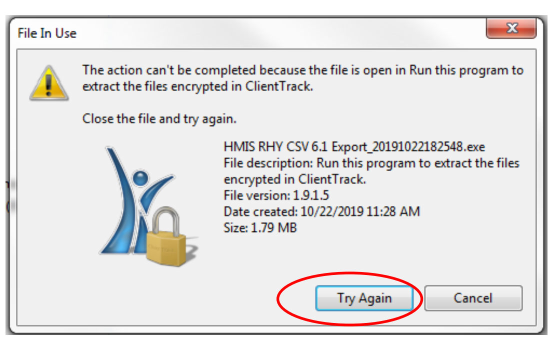
Click on the window tab at the bottom of your computer to the bring up the locked file



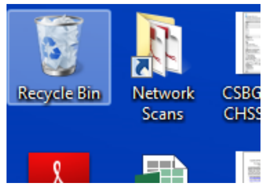
Once the Extract Encrypted Files screen is shoing click on Quit



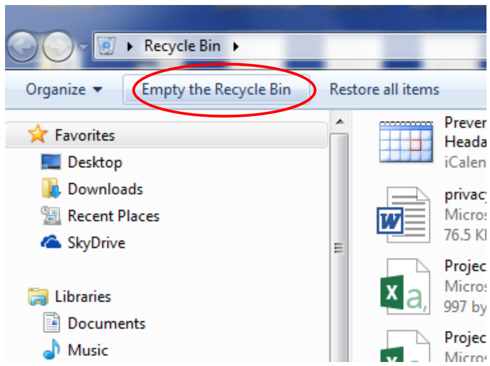
Then Try Again



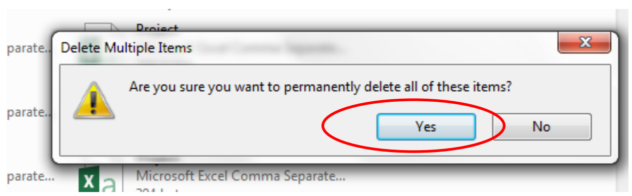
Go to your **Recycle Bin** on your computer desktop



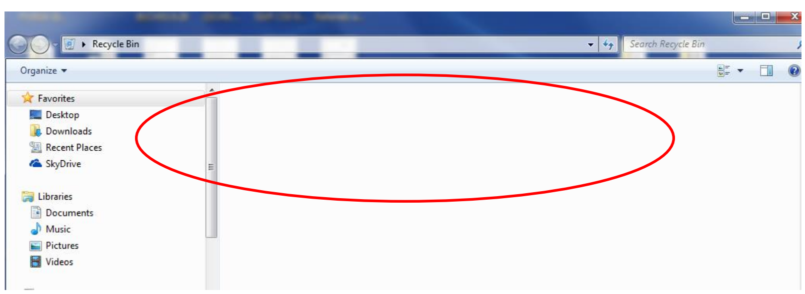
Empty the Recycle Bin.



You will be prompted: “Are you sure you want to permantly delete all files?”



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



You have now completed running the RHY Export –CSV 2020

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

https://www.rhyttac.net/assets/docs/RHY-HMIS/2020.ABT/RHY-HMIS%20Data%20Collection%20User%20Guide_v1.pdf

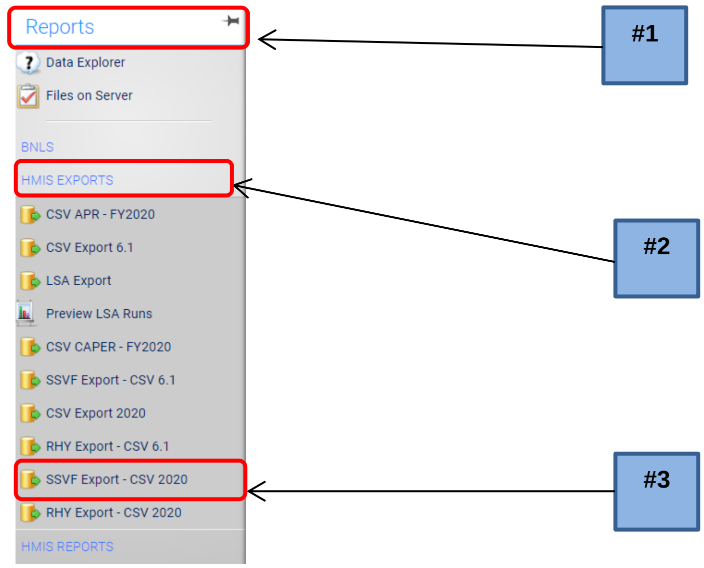
RHY Data Completeness – Data Quality Report User Guide

https://www.rhyttac.net/assets/docs/RHY-HMIS/RHY-HMIS_Data_Completeness_Data_Quality_USER_MANUAL_10-2019_FINAL.pdf

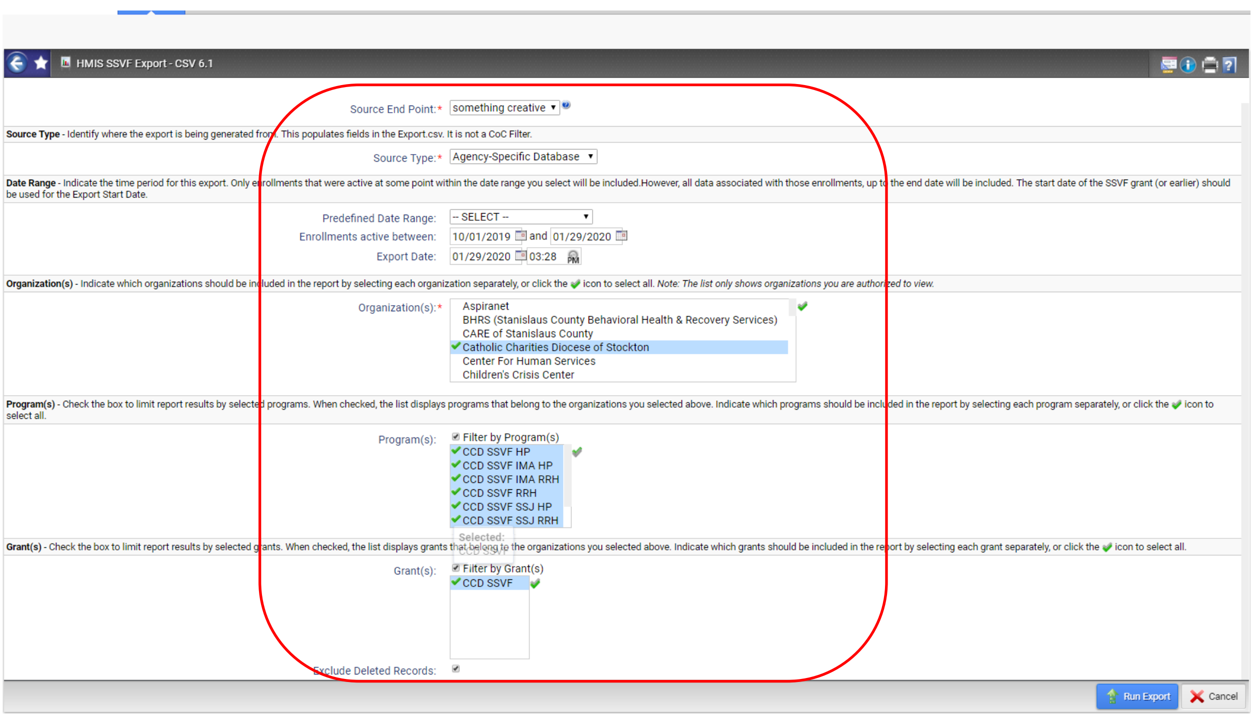
RHY-HMIS Data Dashboard: Grantee Version, User Guide v1.1
https://www.rhyttac.net/assets/docs/RHY-HMIS/RHY-HMIS_Dashboard_User_Guide_82019_v1.1.pdf

SSVF CSV 2020

From the Reports Workspace>HMIS Exports



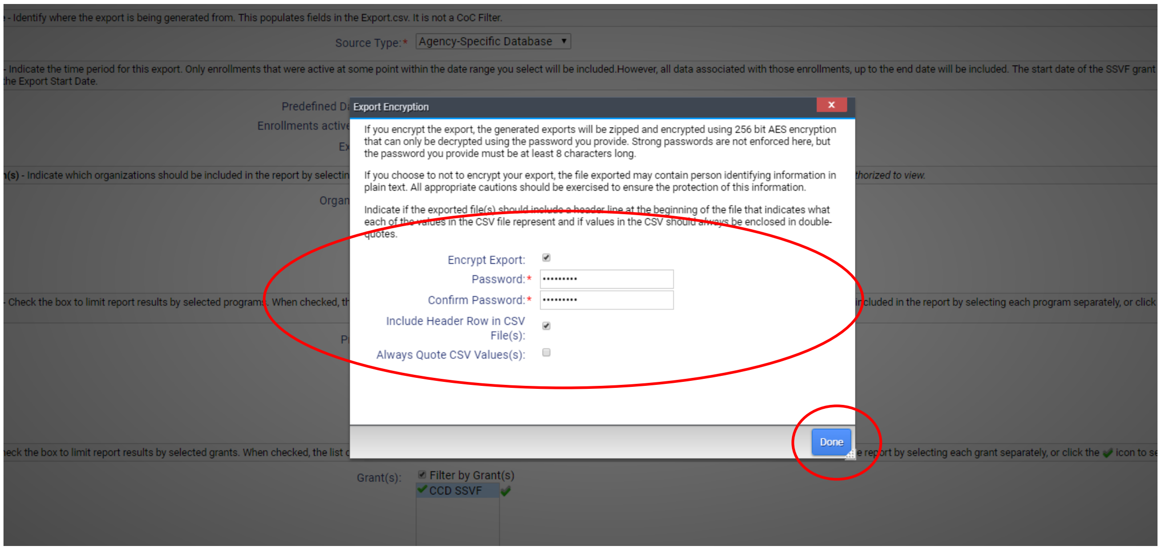
Add the **Source End Point**, **Source Type**, and **Enrollments active between dates** which are from the start of the grant 10/01/2017, which will default to the date that you are running the report, do not change the Export Dateas the date must be the same date that you upload the data per the VA, 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.



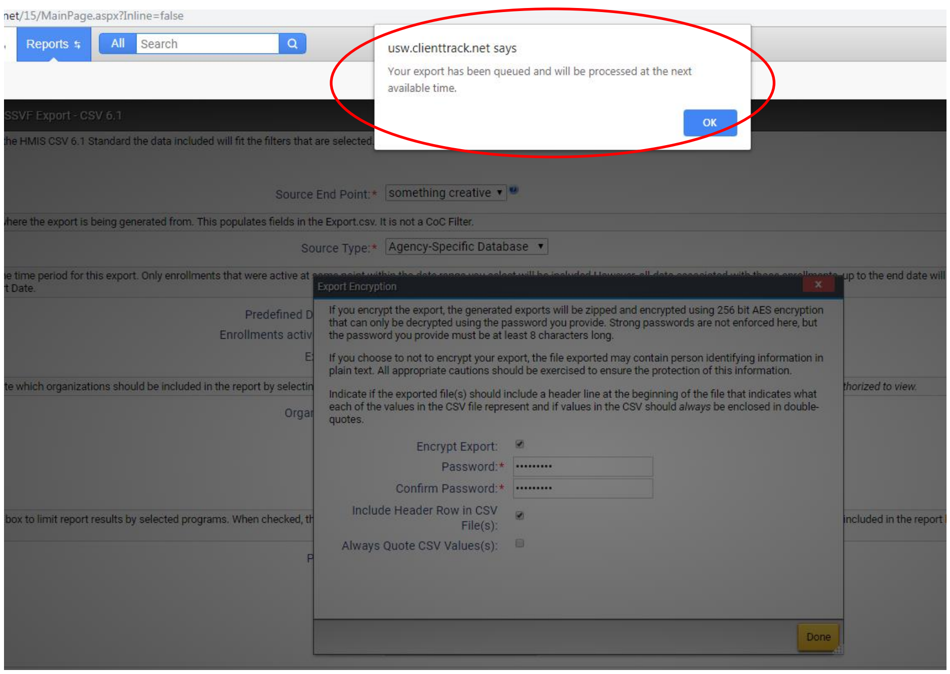
Then select Run Export 

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

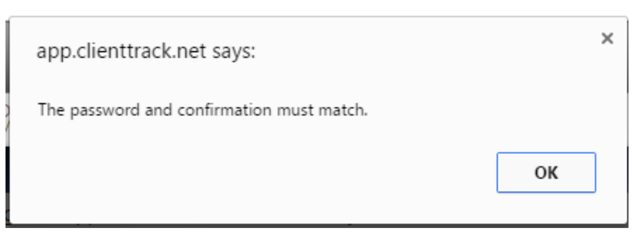
You will then have to create a Password and once confirmed, click **Done**

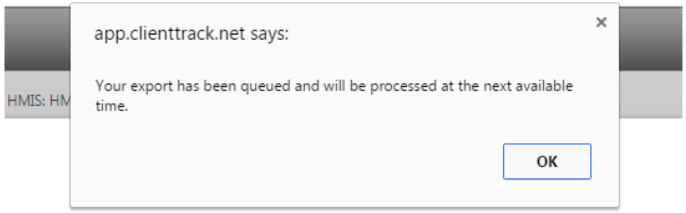


A window will appear giving you the status of your request.

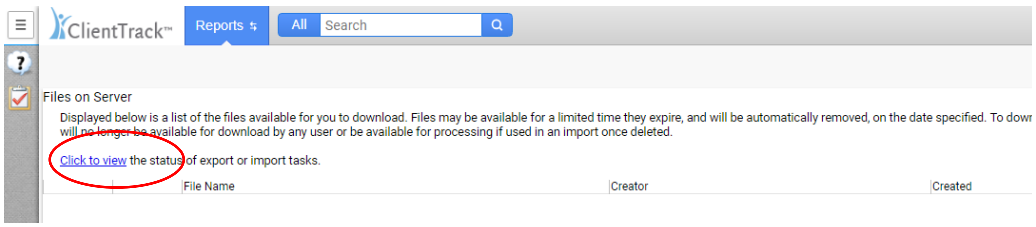


You will be prompted if there are issues or if your export has been queued.

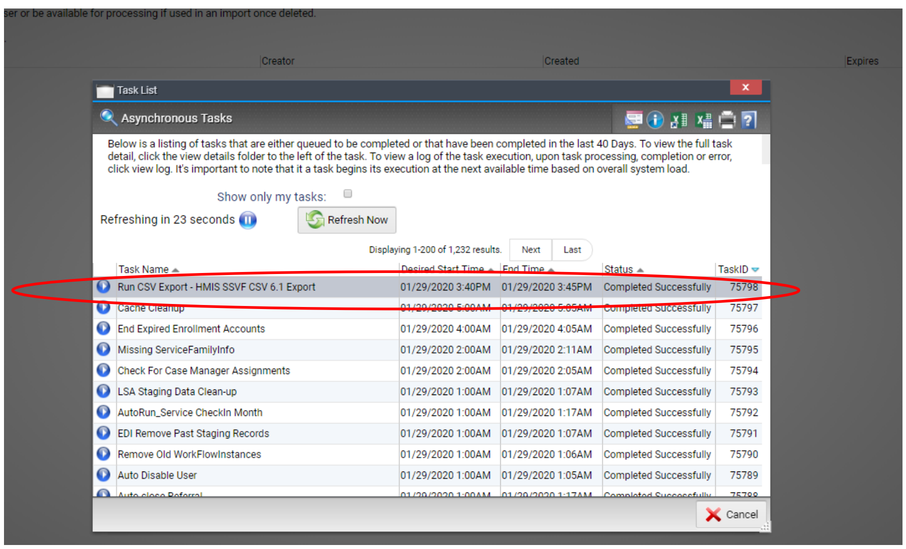




To verify your report is running click on the “Click to view”

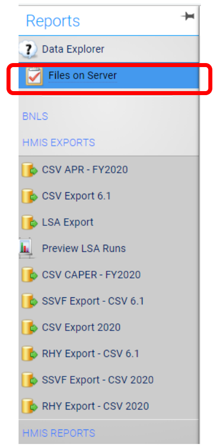


The report status will be visible.

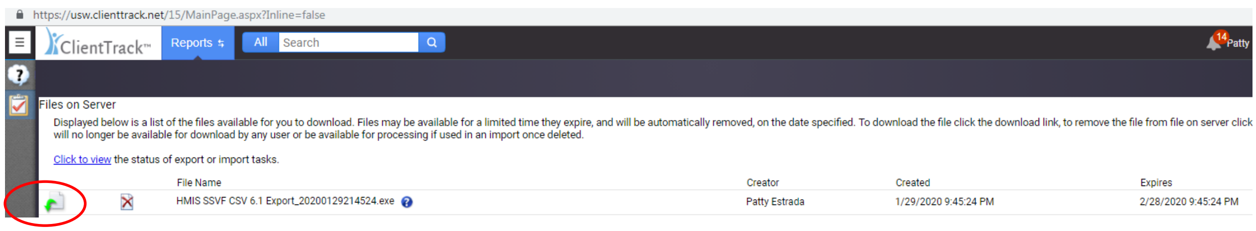


Note: While the report is running you can go to the Clients Workspace and continue doing other things in ClientTrack this will not stop or interrupt the report process.

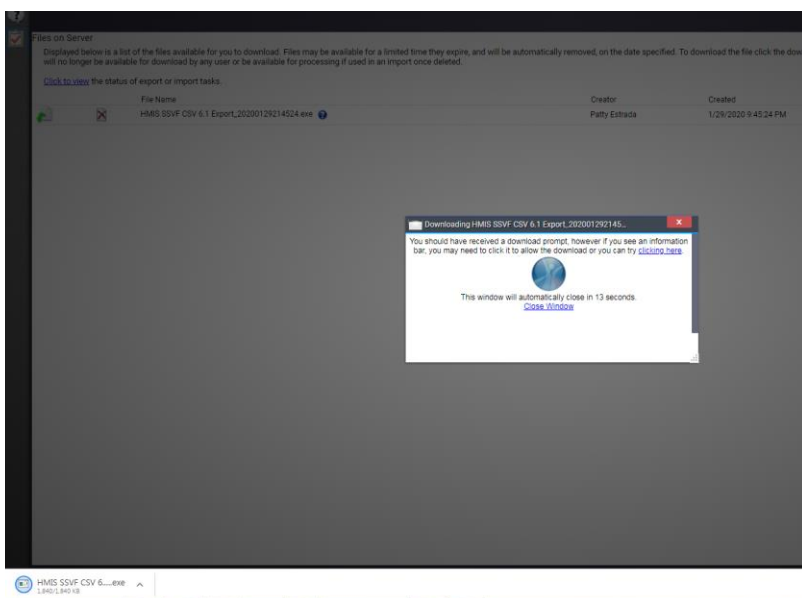
To see if your report is ready, you can find it by clicking **Reports** and **Files on Server**.



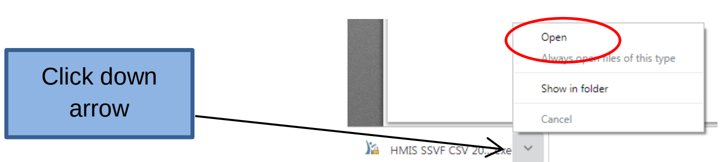
From there, you click on the **green download arrow**.



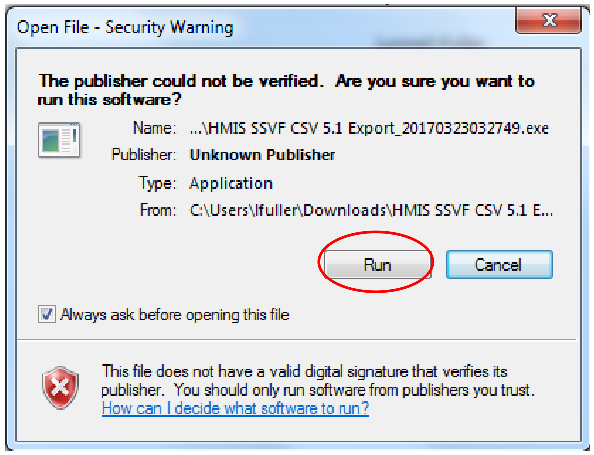
The report will download



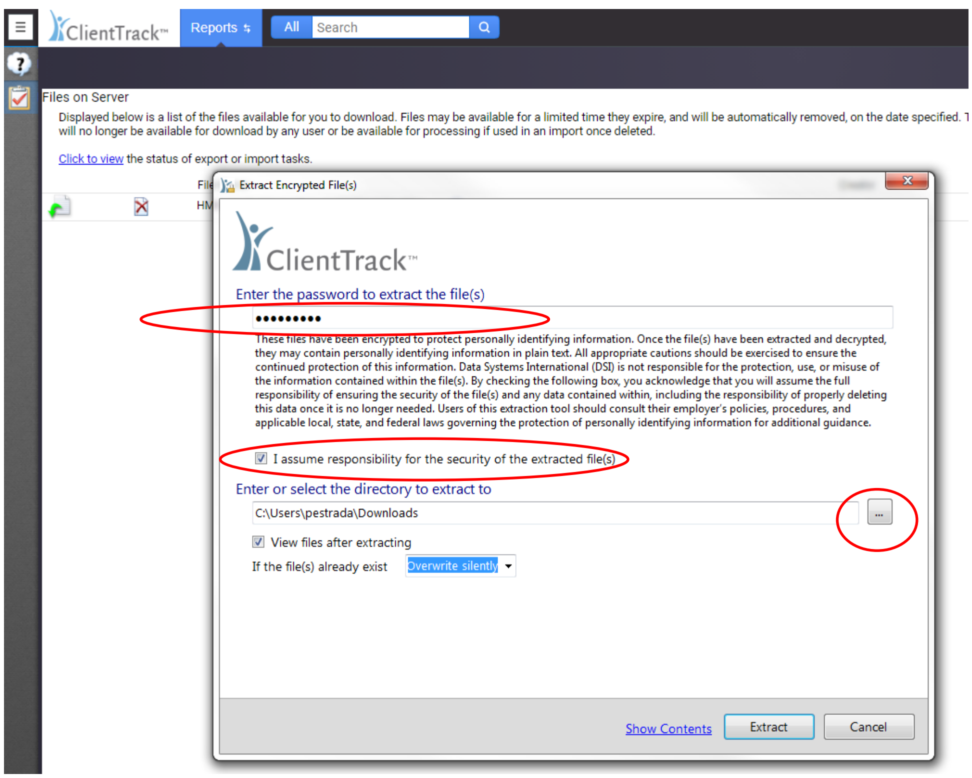
Click the **Down Arrow** and then **Open**



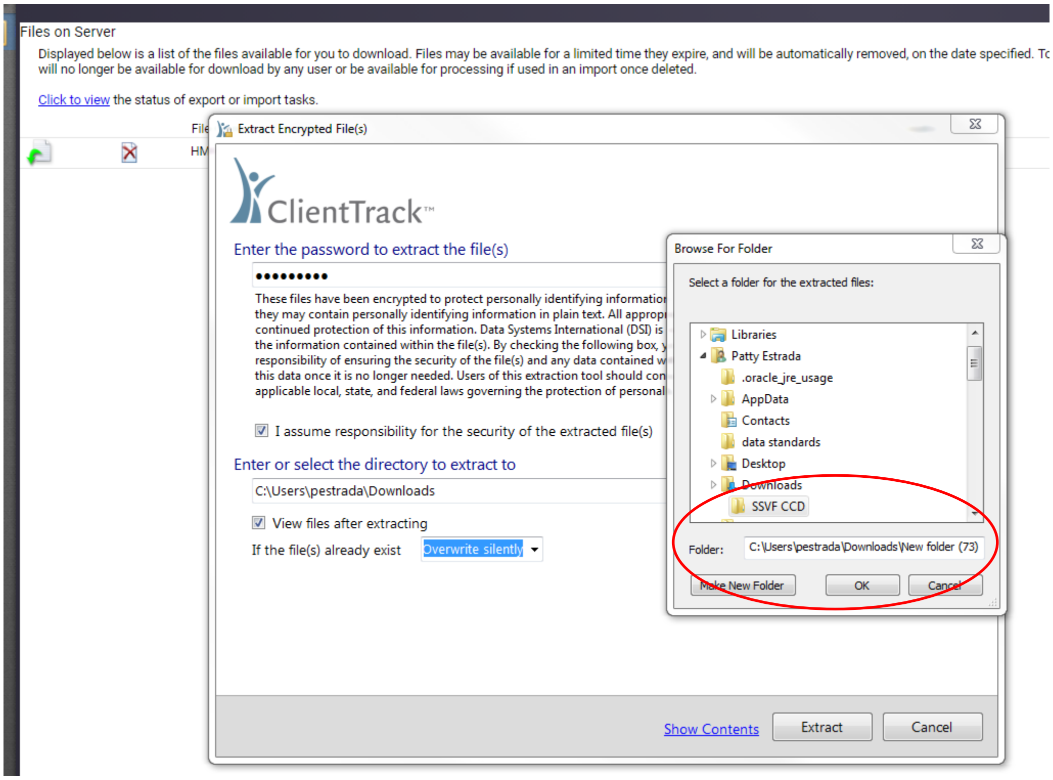
If you get a “Security Warning” click on Run



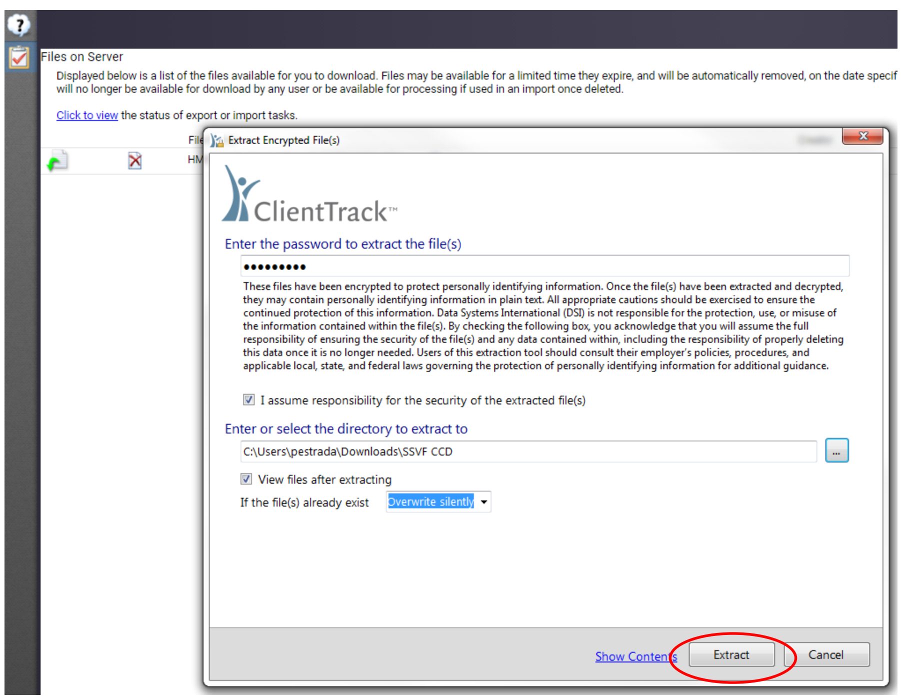
You will then enter your **Password**, **Assume responsibility for the security**, and report where/**which folder** you want to extract to.



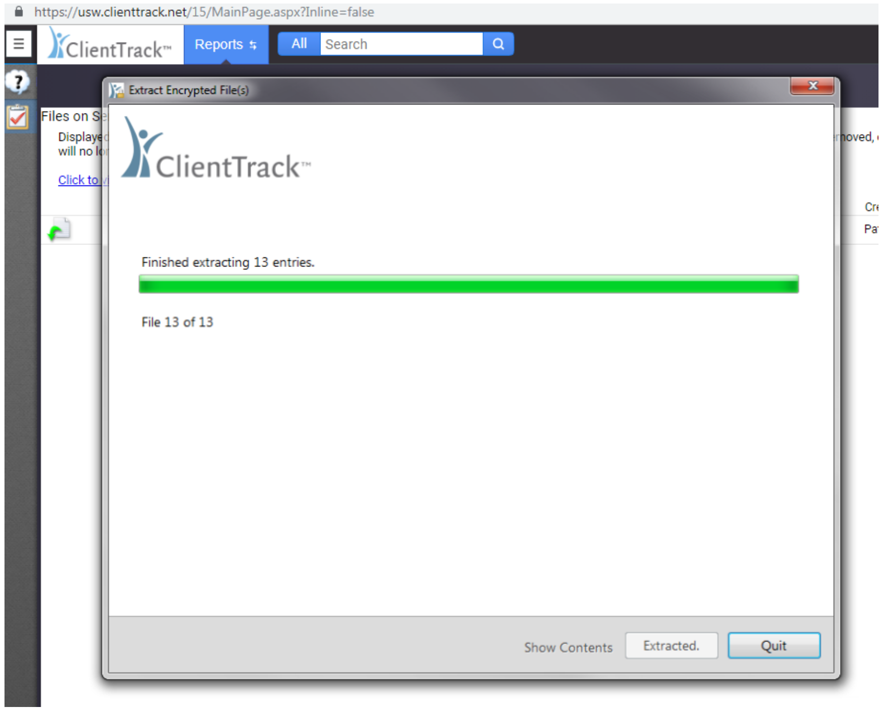
Once you choose a file or Make New Folder, you then click OK



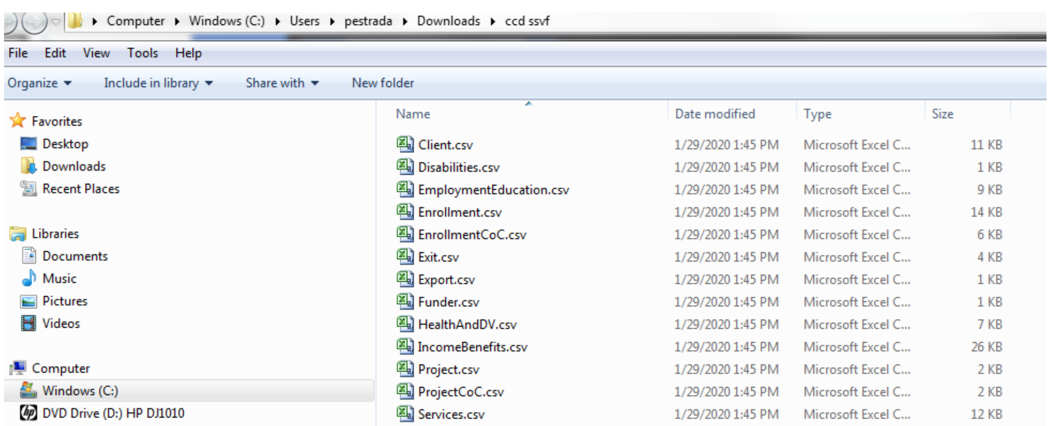
This screen will appear, click Extract

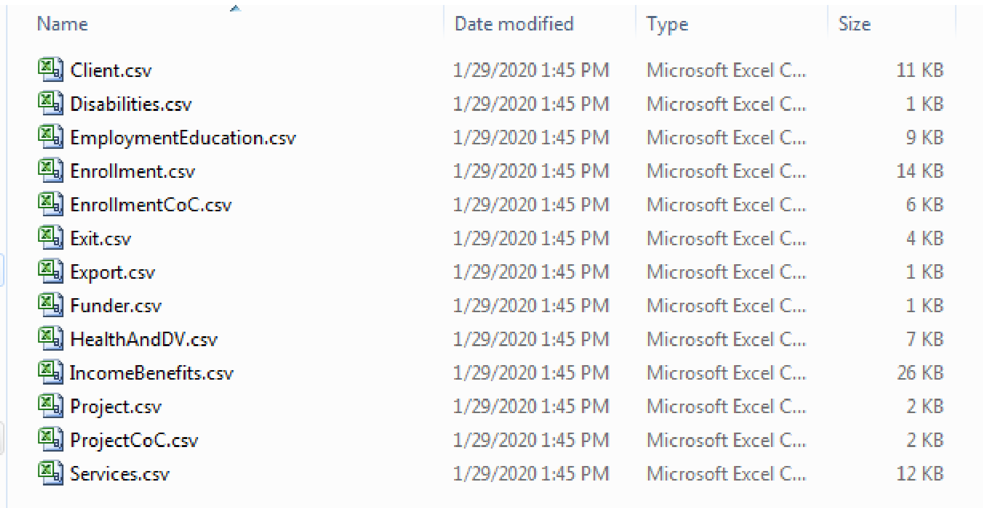


The files will be extracted



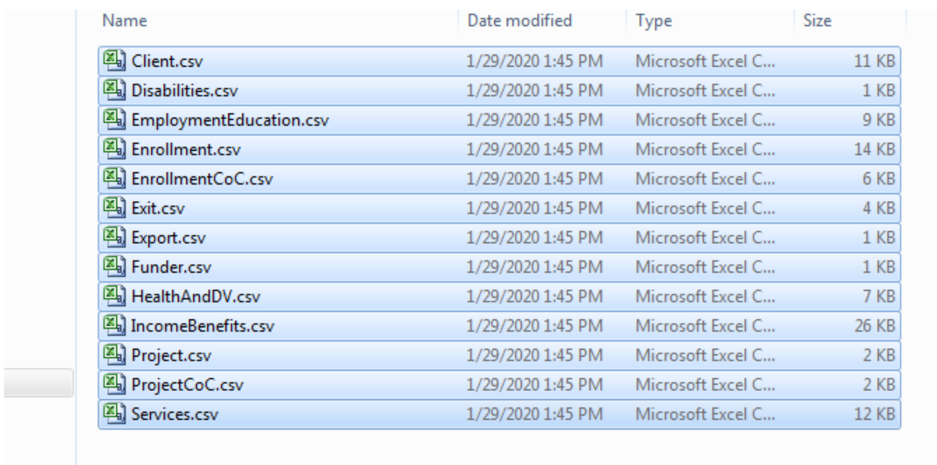
Once extracted, the 13 files will appear



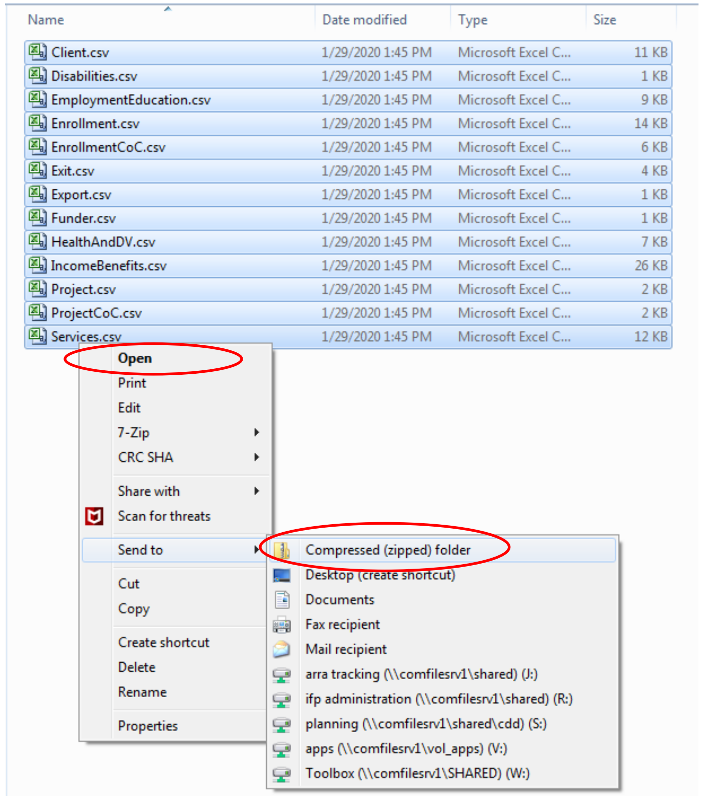


Name	Date modified	Type	Size
Client.csv	1/29/2020 1:45 PM	Microsoft Excel C...	11 KB
Disabilities.csv	1/29/2020 1:45 PM	Microsoft Excel C...	1 KB
EmploymentEducation.csv	1/29/2020 1:45 PM	Microsoft Excel C...	9 KB
Enrollment.csv	1/29/2020 1:45 PM	Microsoft Excel C...	14 KB
EnrollmentCoC.csv	1/29/2020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

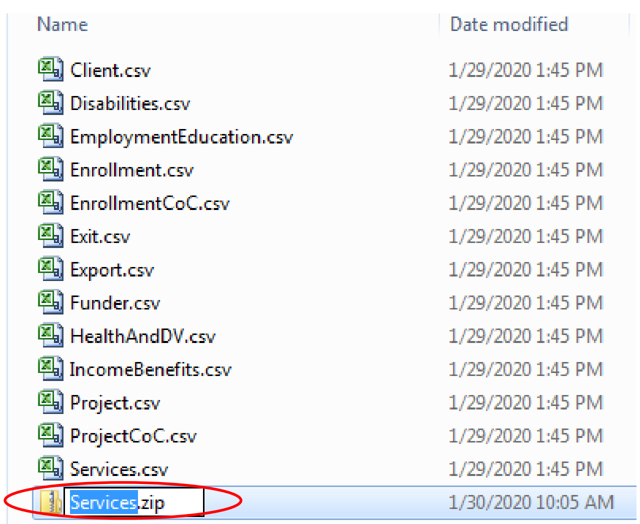
Do not open and view the files until you have created a zipped folder. It can change the format of the data causing upload issues. Highlight all of the files, right click, and create compressed (zipped) folder.

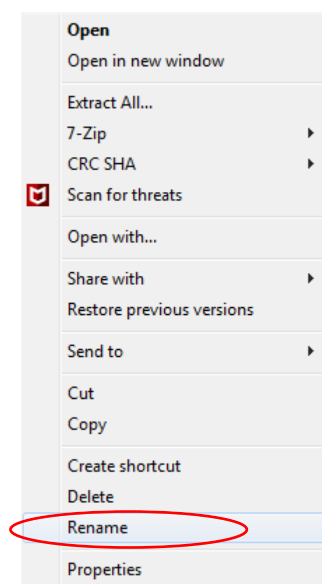


Name	Date modified	Type	Size
Client.csv	1/29/2020 1:45 PM	Microsoft Excel C...	11 KB
Disabilities.csv	1/29/2020 1:45 PM	Microsoft Excel C...	1 KB
EmploymentEducation.csv	1/29/2020 1:45 PM	Microsoft Excel C...	9 KB
Enrollment.csv	1/29/2020 1:45 PM	Microsoft Excel C...	14 KB
EnrollmentCoC.csv	1/29/2020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

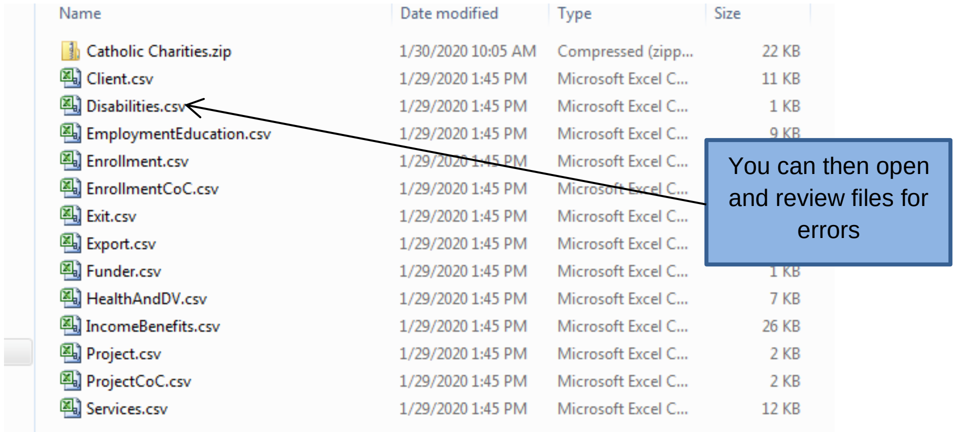


Don’t forget to rename the zipped file by right clicking and hit Rename





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



REFER TO YOUR HMIS CSV FORMAT SPECIFICATIONS FOR DATA GUIDE

FY2021 SSVF Monthly Report Guide v1.0

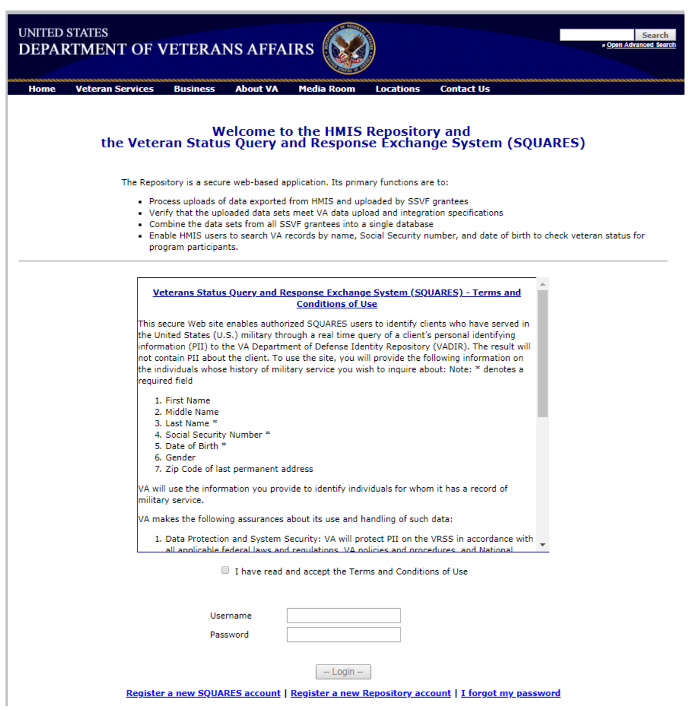
https://www.va.gov/HOMELESS/ssvf/docs/SSVF_Monthly_Report_Guide_FY21.pdf

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



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

☑ I have read and accept the Terms and Conditions of Use

Username

Password

-- Login --

Register a new SQUARES account | **Register a new Repository account** | **I forgot my password**

UNITED STATES
DEPARTMENT OF VETERANS AFFAIRS

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» Open Advanced Search

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HMIS Repository / SQUARES Account Menu

User Options

- SQUARES
- My Account
- Activity History
- Support
- Logout

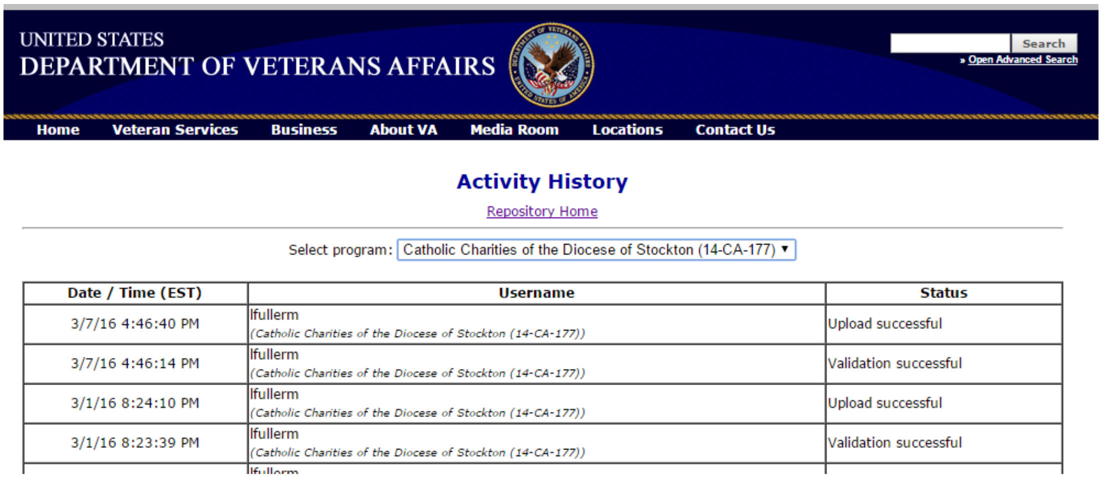
Important Upload Information

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

Grant/Programs:

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

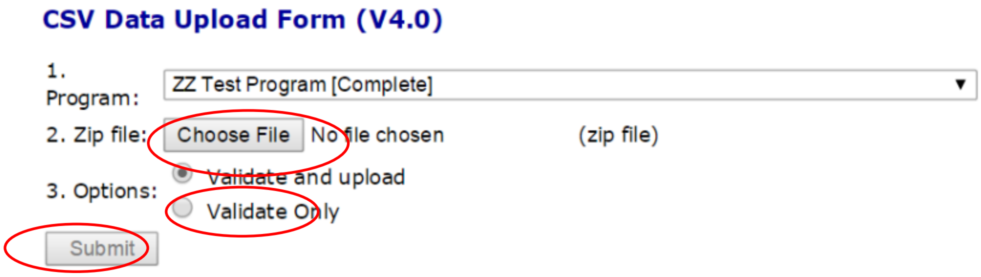
CoC:



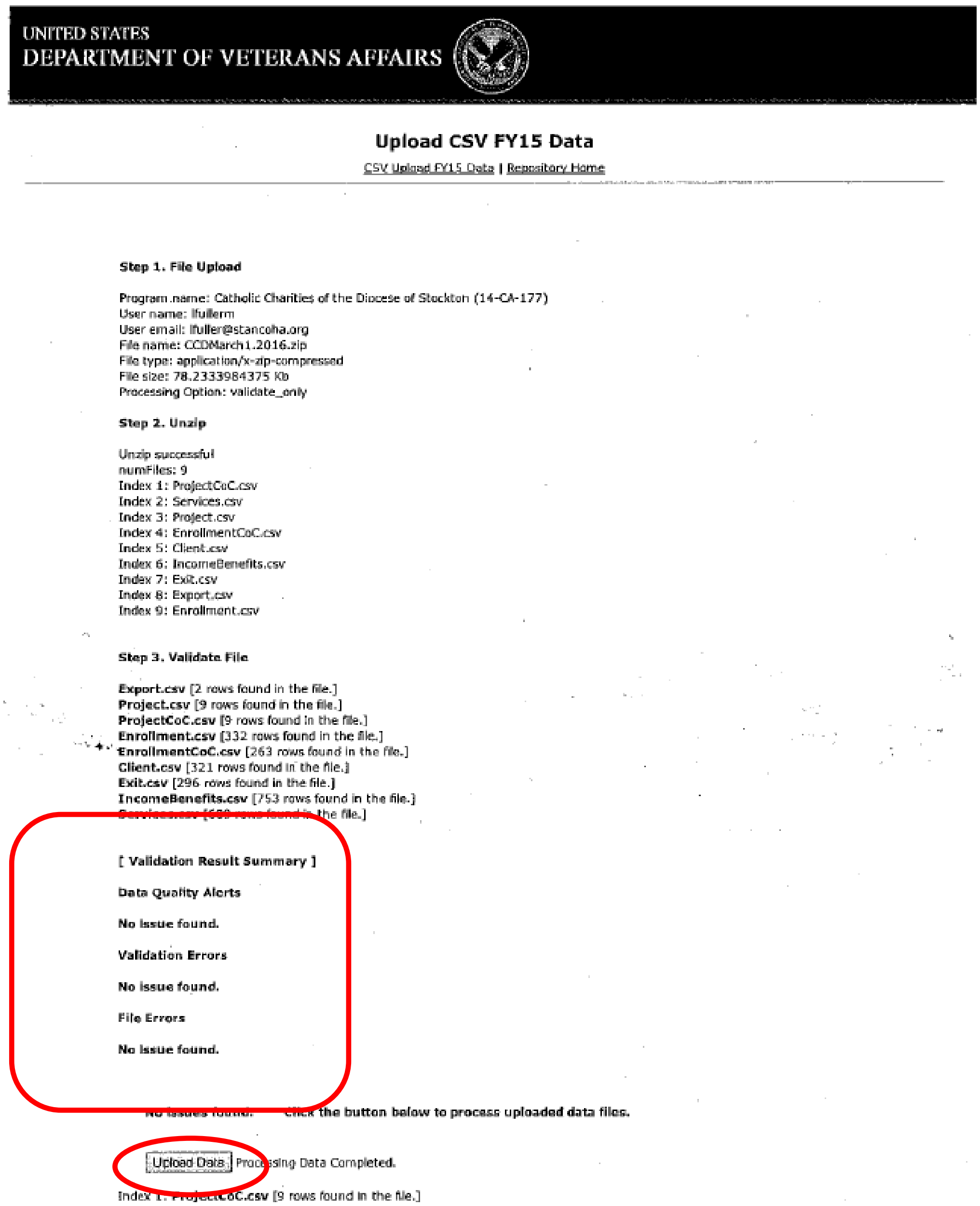
Validation

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.

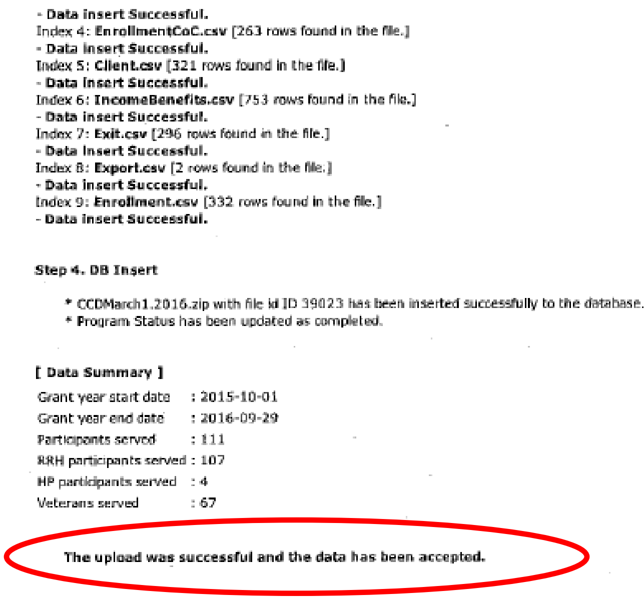
Click on **Choose File** and attach the file you are going to upload, click on **Validate Only**, then **Submit**



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



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


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

Step 4. DB Insert

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

[Data Summary]

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

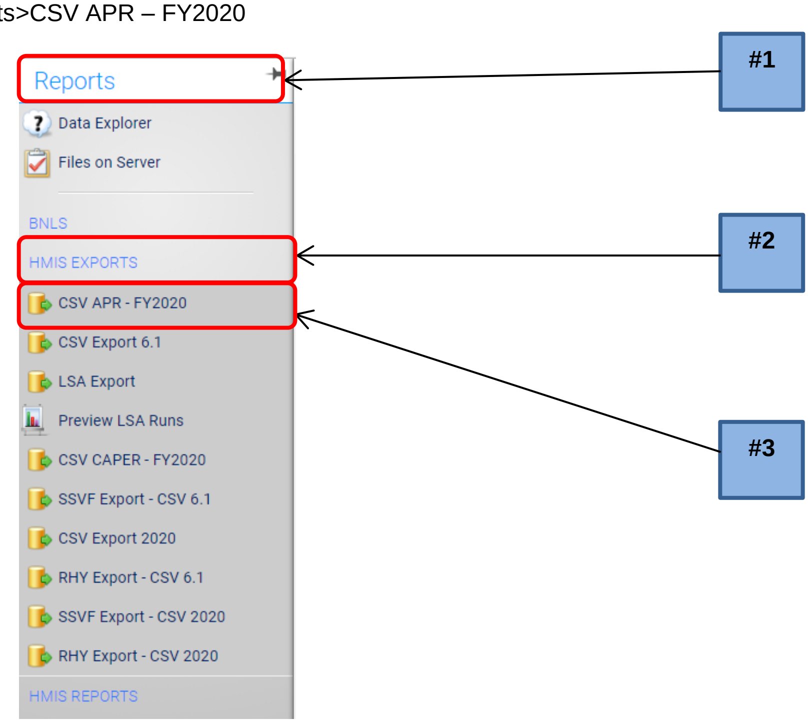
The upload was successful and the data has been accepted.

YOU HAVE COMPLETED YOUR UPLOAD!

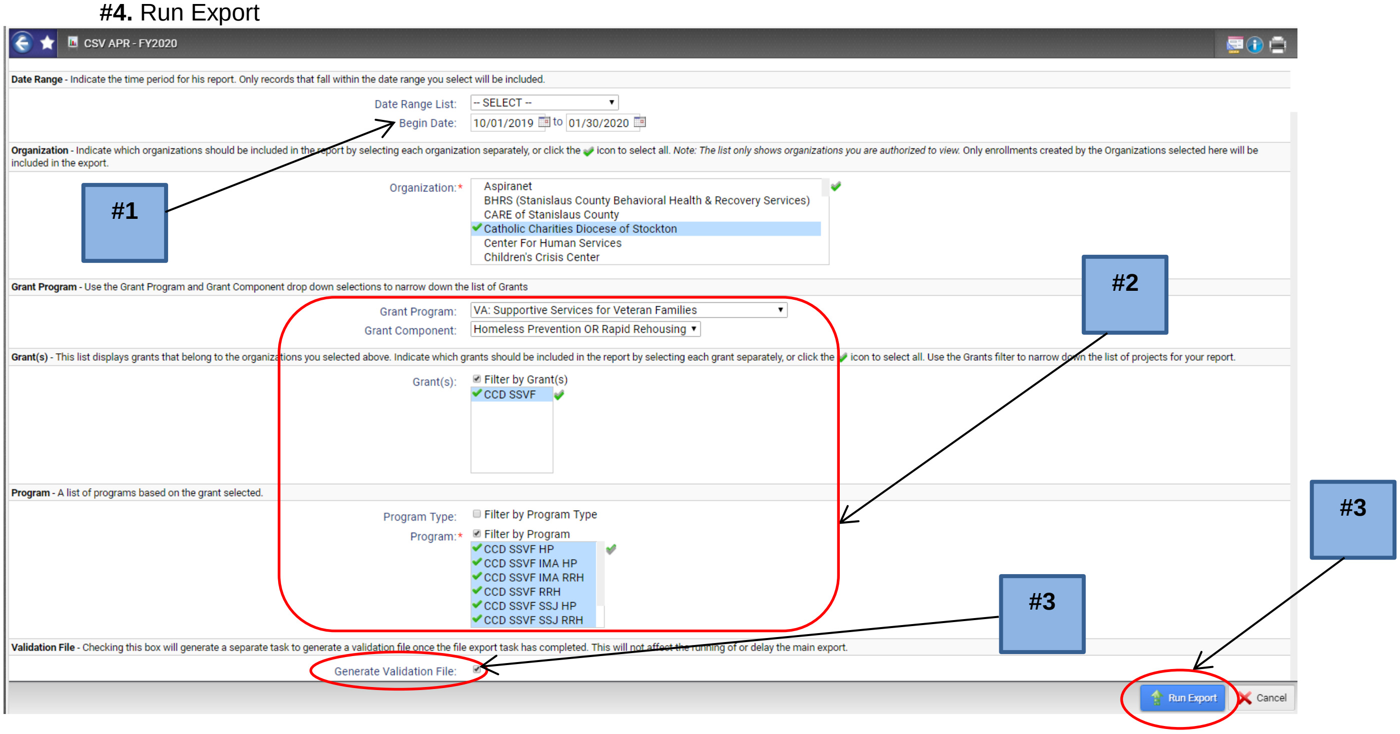
Annual Performance Report (APR)

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

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

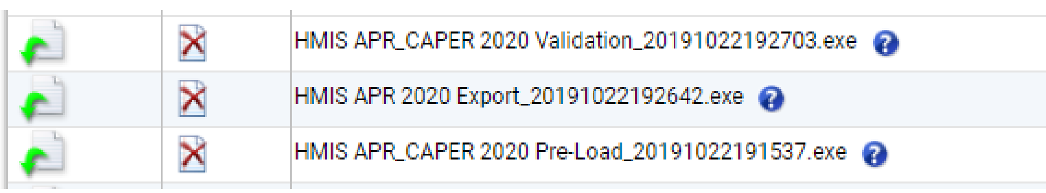


#1. Select Begin Date Range
#2. Choose Grant Program, Grant Component,Grants, and Program
#3. Check Generate Validation File
#4. Run Export

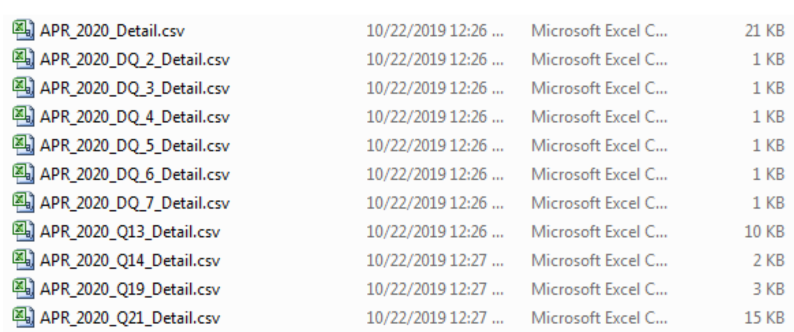


The report launch form has the **Date Range, Organization, Grant,** and **Program** filter similar to other HMIS Compliance Reports. To generate a validation file similar to the output of the APR, ESG, and DQ Detail Export, check the box next to **Generate Validation File**

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



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



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

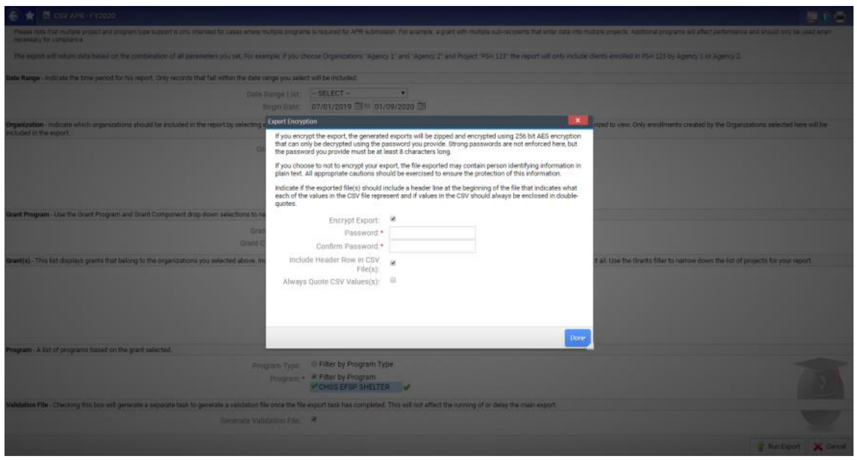
The CoC APR will report active clients in projects based on the HMIS Reporting Glossary methods. For projects other than Street Outreach projects, active clients must have a contact in the reporting range. The SAGE repository looks for consistent counts across the questions. Question validation between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

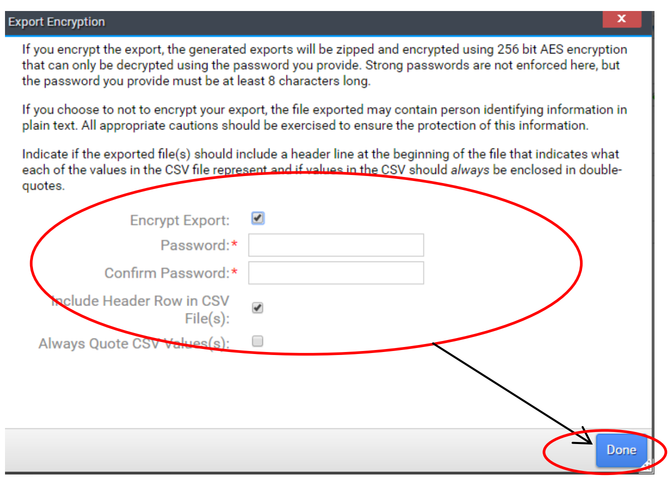
- **Projects other than Street Outreach:** For project types other than Street Outreach, the report will check the number (or sum of several numbers) and look for an equal or lesser number in questions. For example, income questions should equal the number of adult stayers or leavers. In Q23, the total in any one should be less than or equal to the number of leavers.

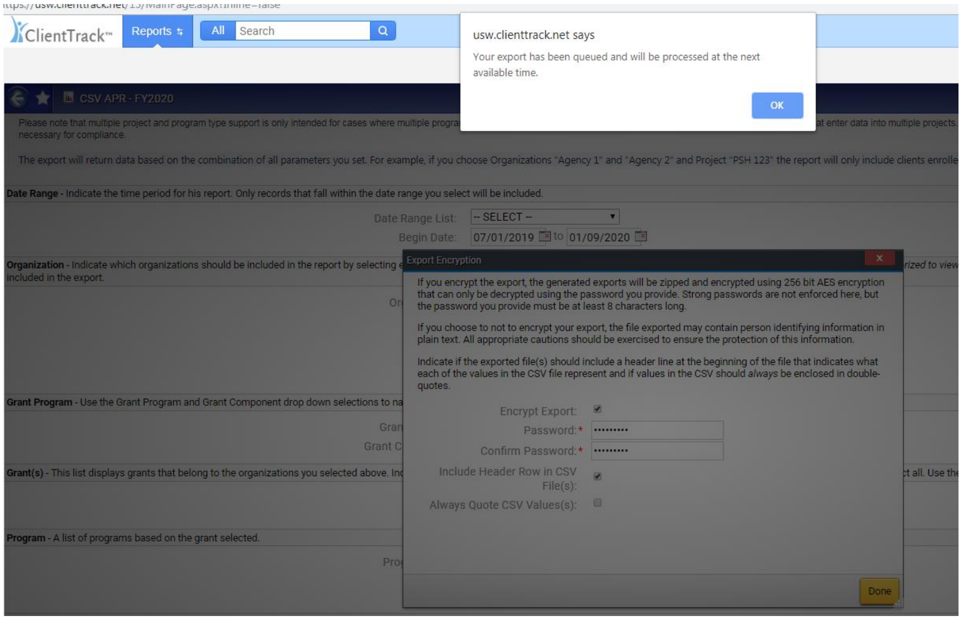
❖ **Street Outreach Projects:** Because the data quality questions require a date of engagement in order to be counted, the number of clients shown in Q5a will tend to not equal the number of clients (adults, leavers, etc.) in corresponding questions. The validation rule will check that the count of 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.

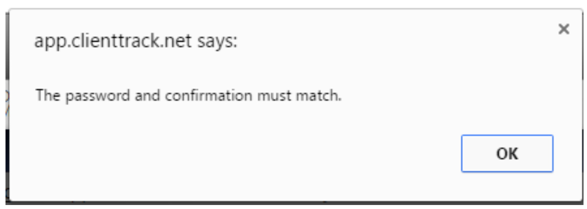
You will have to create a Password, keep the **Encrypt Export** and **Include Header Row in the CSV Files** boxes checked, you have the option to check Always Quote CSV Values but this is not necessary, see descriptions below. Then click Done.

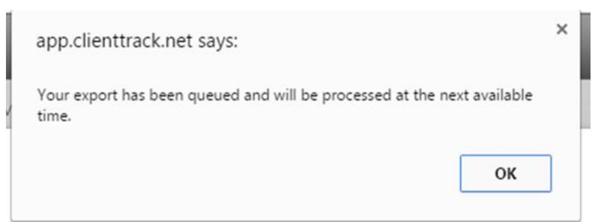




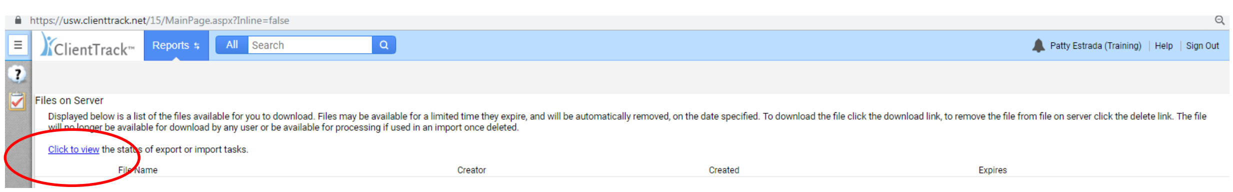


You will be prompted if there are issues or if your export has been queued. ***Note:** It can take up to 20 minutes or longer to run each Export.



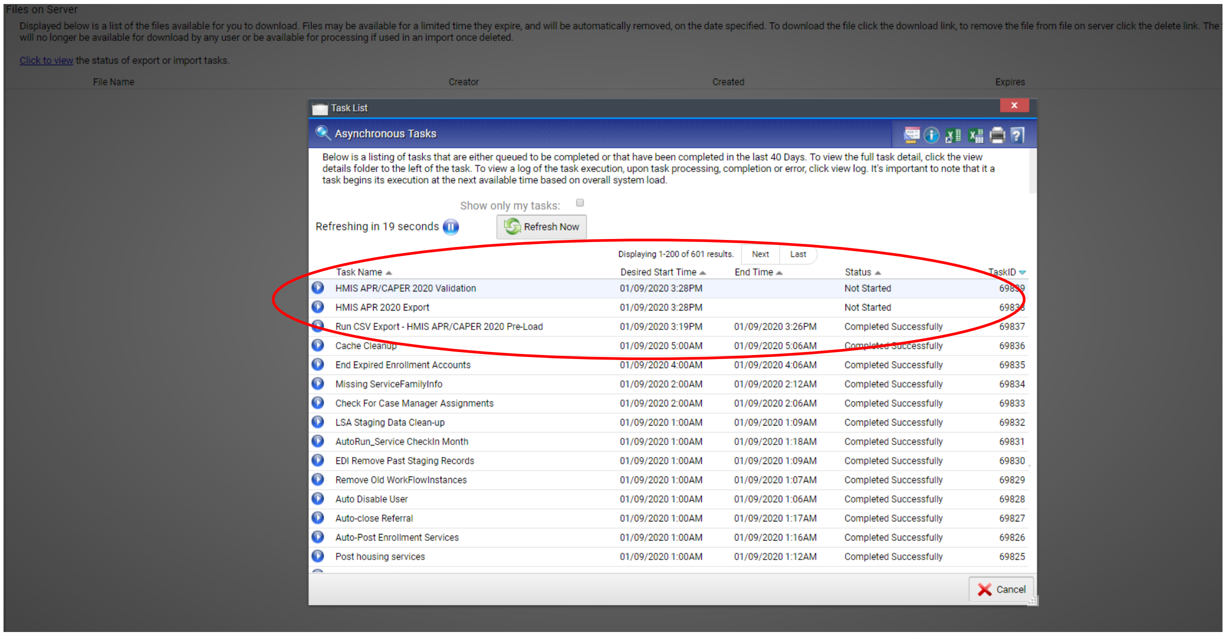


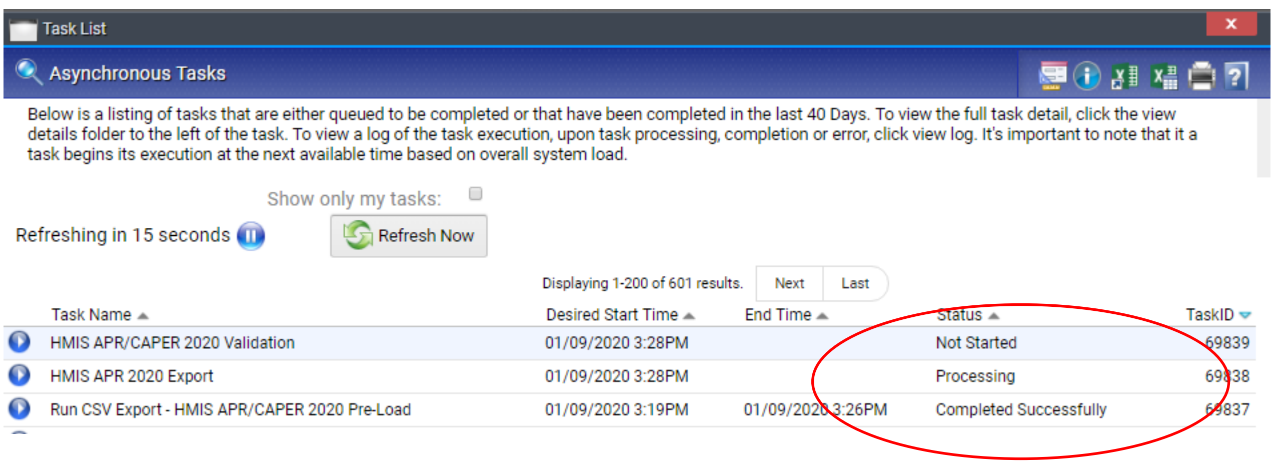
To verify the report is running, click on the “Click to view”



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

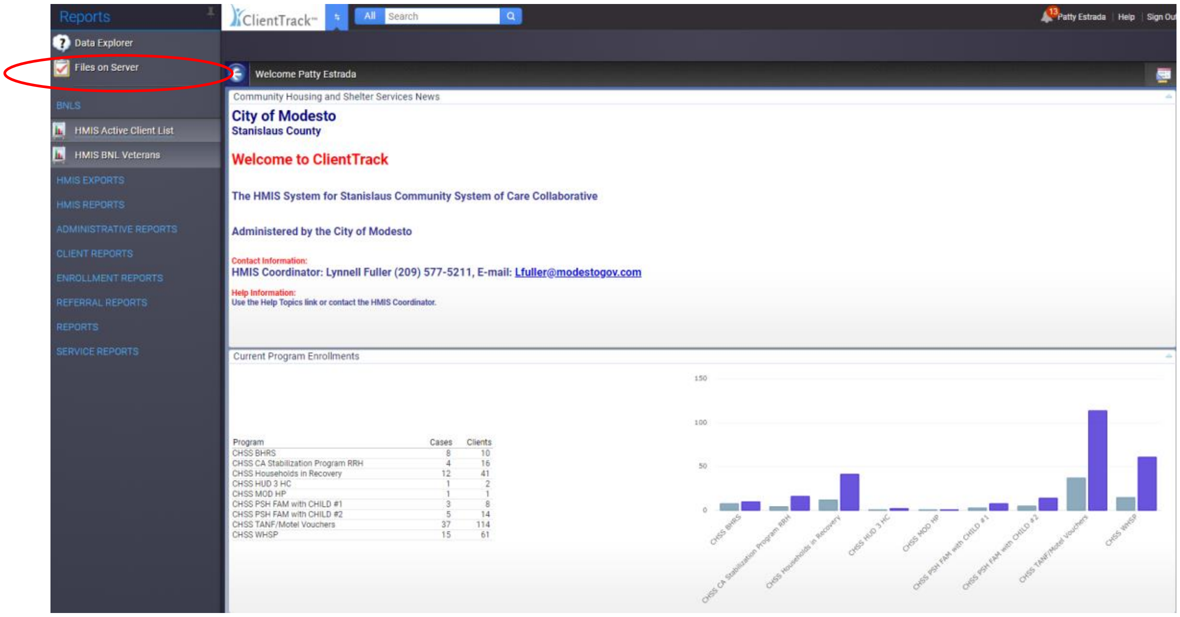
This will bring up the Asynchronous Tasks list. Here you can see the status of your report: Not Started, Processing, or Completed Successfully





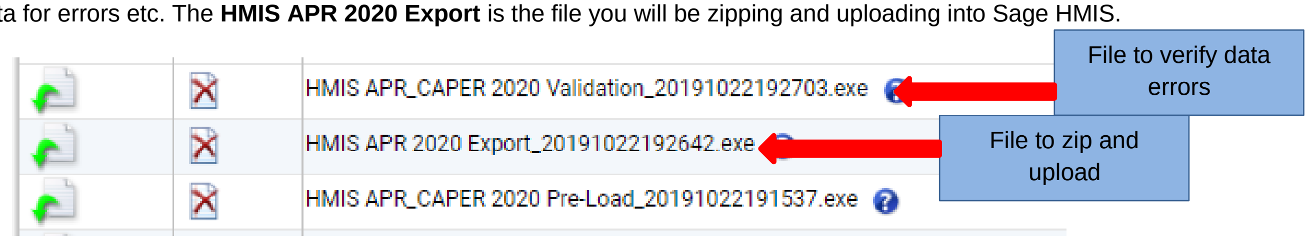
Note: While the report is generating, you may perform other task within other workspaces in ClientTrack, this will not interrupt the report process.

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

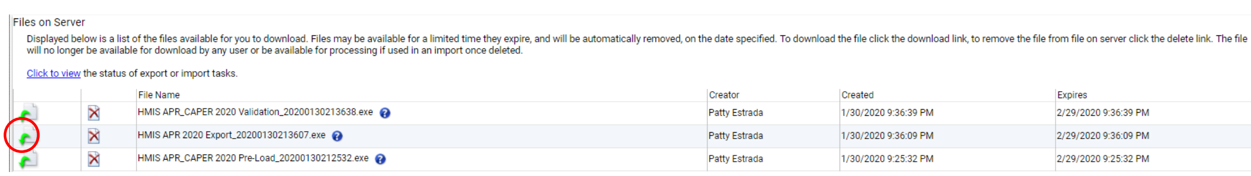


***Note:** Files On Server can aslo be accessed by selecting My Saved Reports>Files on Server

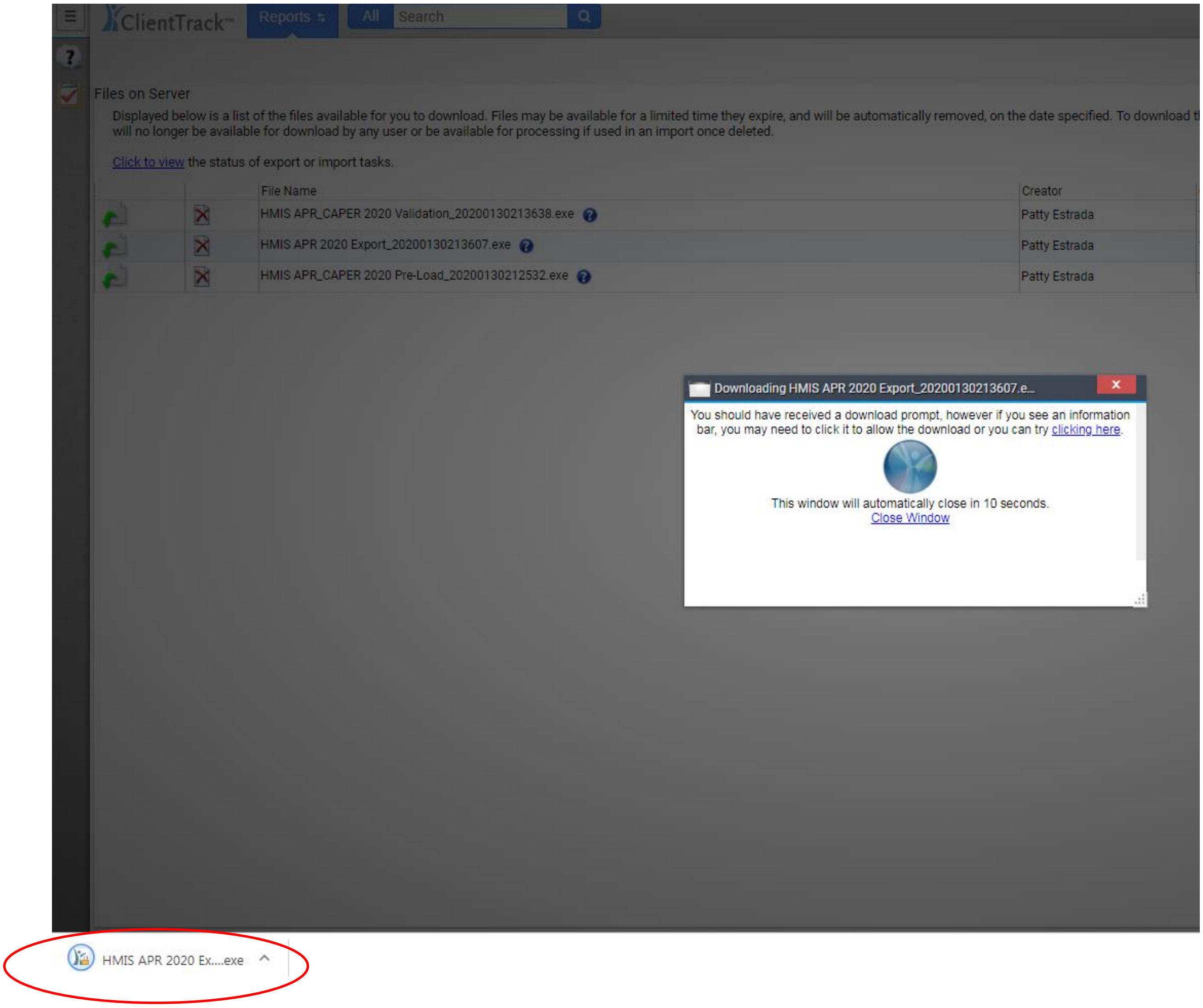
You are going to be working with the **HMIS APR 2020 Validation**, formally called the Data Validation File, to verify your data for errors etc. The **HMIS APR 2020 Export** is the file you will be zipping and uploading into Sage HMIS.

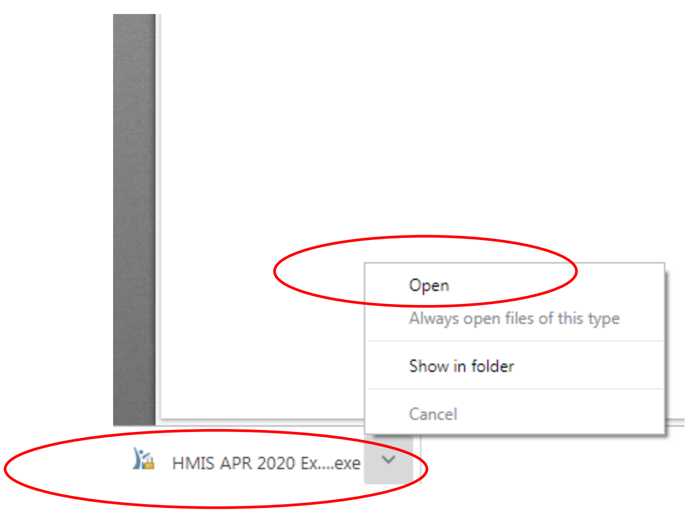


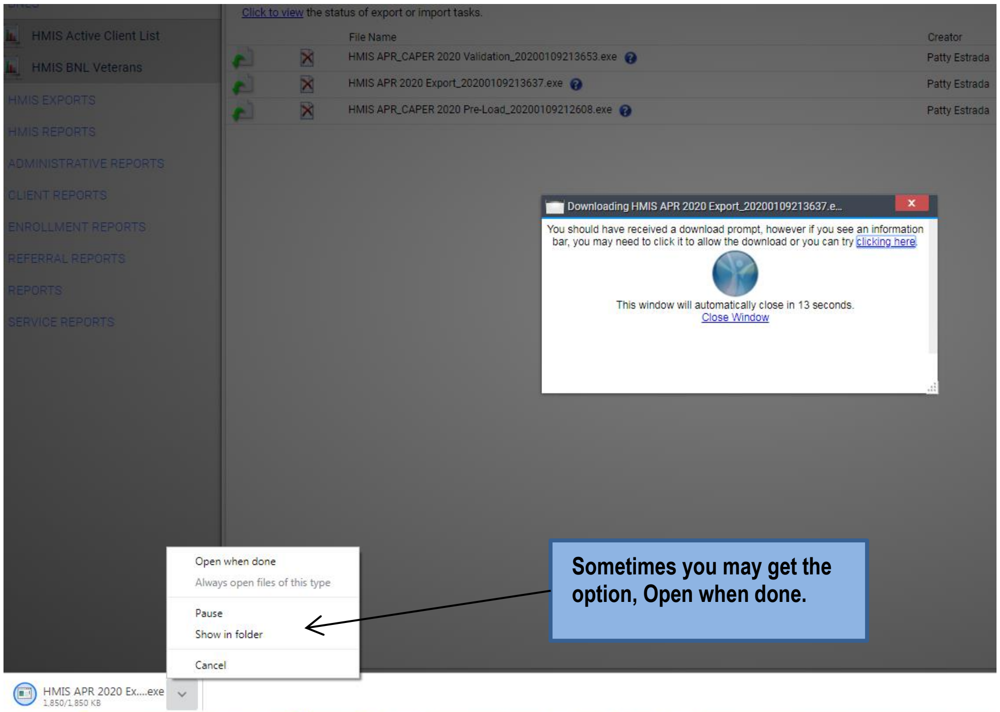
Once the report is showing, click on the Green Arrow next to the report you would like to Run



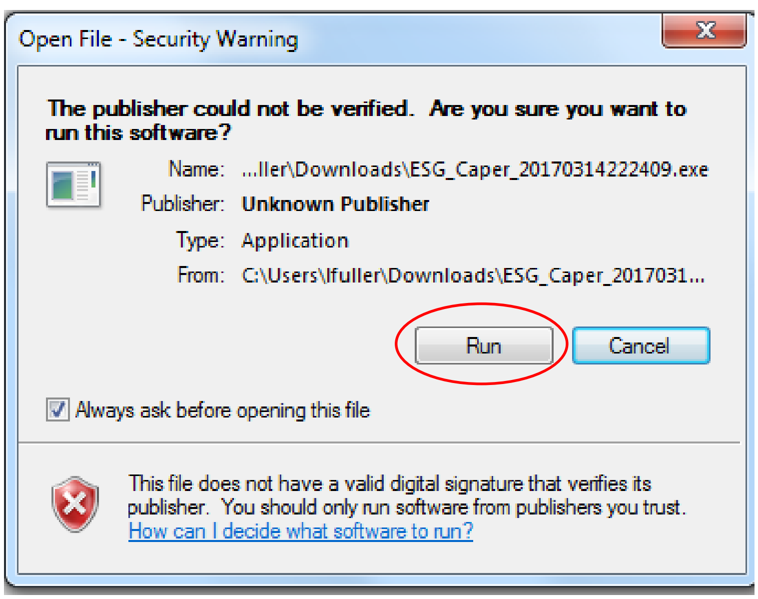
The report will begin to download, once complete, you will click to open the file.



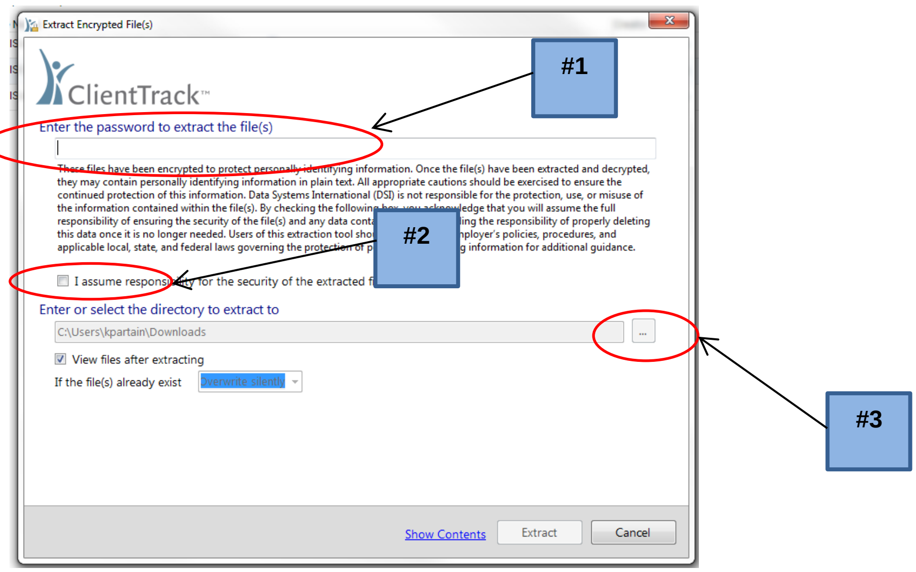




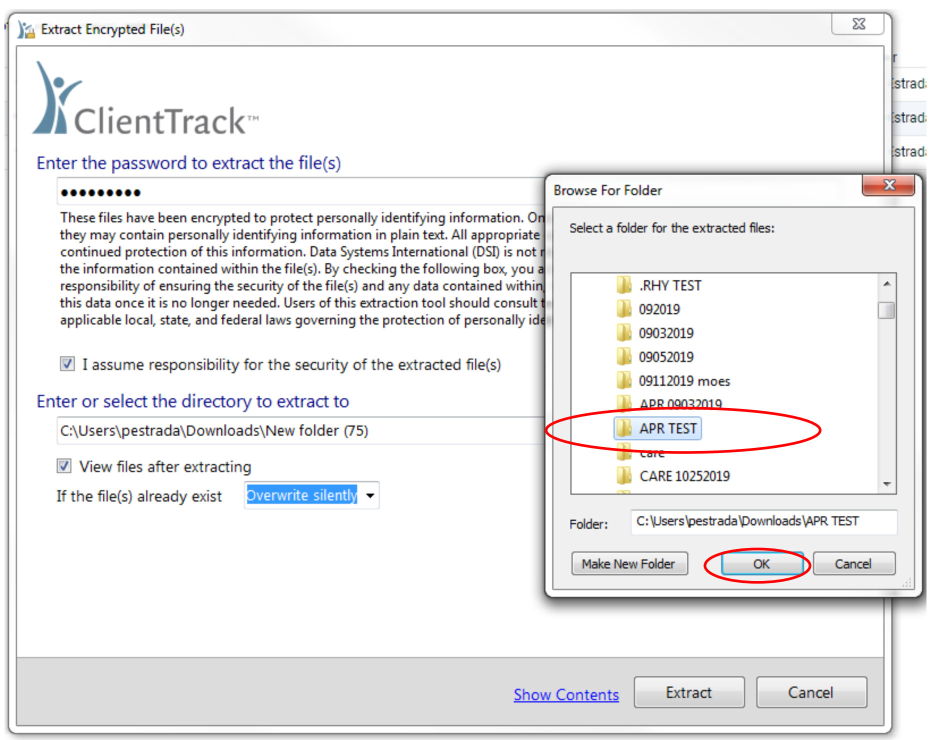
Click on Run, Security Warning, click on "Run"

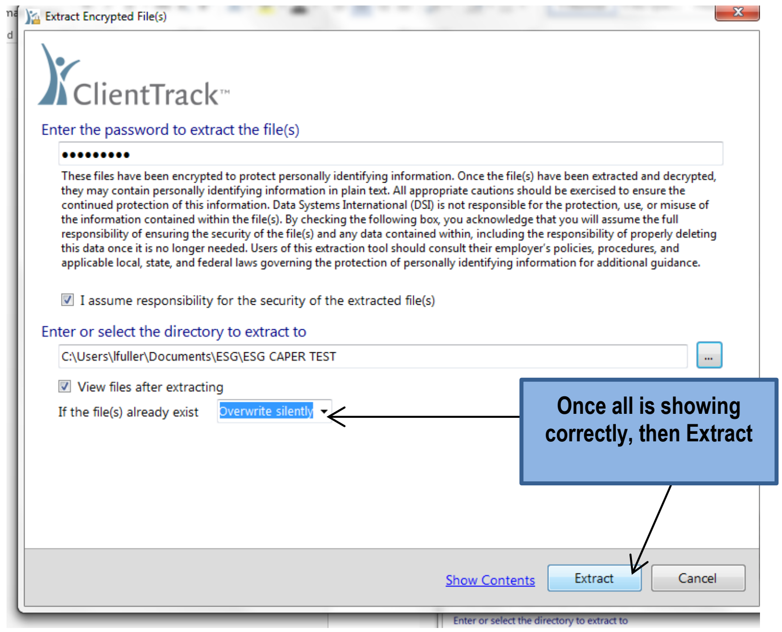


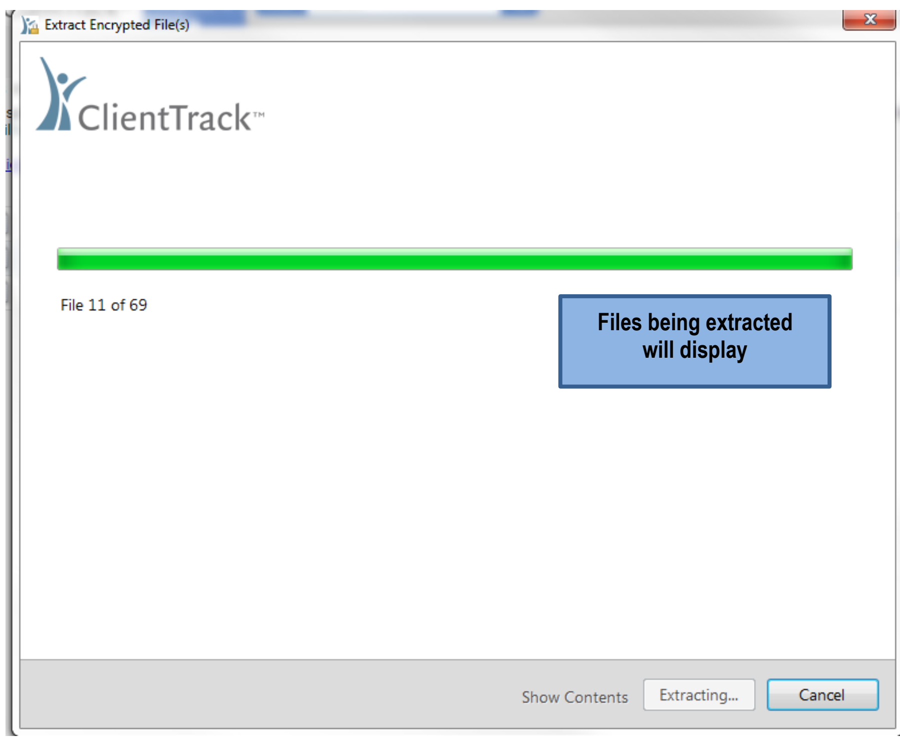
You will then be prompted to:
#1. Put in the Password you created
#2. Mark “I assume responsibility for the security of the extracted file(s)”
#3. Tell the system where you want the extracted file to go before you extract the file

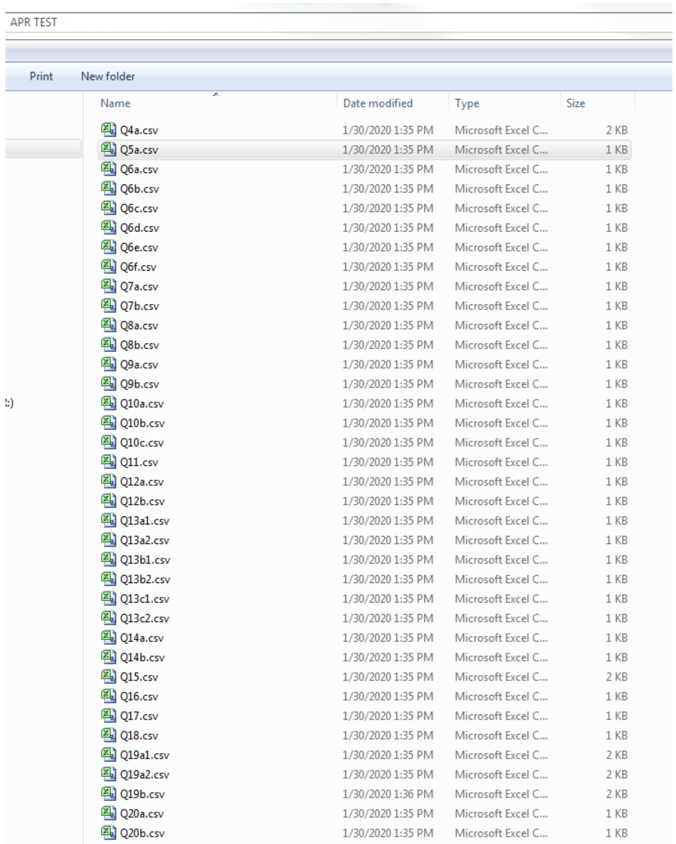


You can create a new folder by clicking **Make New Folder**, then once it is highlighted on the folder you want,click **OK**




Extract Encrypted File(s)
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 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 responsibility of properly deleting this data once it is no longer needed. Users of this extraction tool should consult their employer's policies, procedures, and applicable local, state, and federal laws governing the protection of personally identifying information for additional guidance.
I assume responsibility for the security of the extracted 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
Overwrite silently
Once all is showing correctly, then Extract
Show Contents
Extract
Cancel


Extract Encrypted File(s)
ClientTrack™
File 11 of 69
Files being extracted will display
Show Contents
Extracting...
Cancel



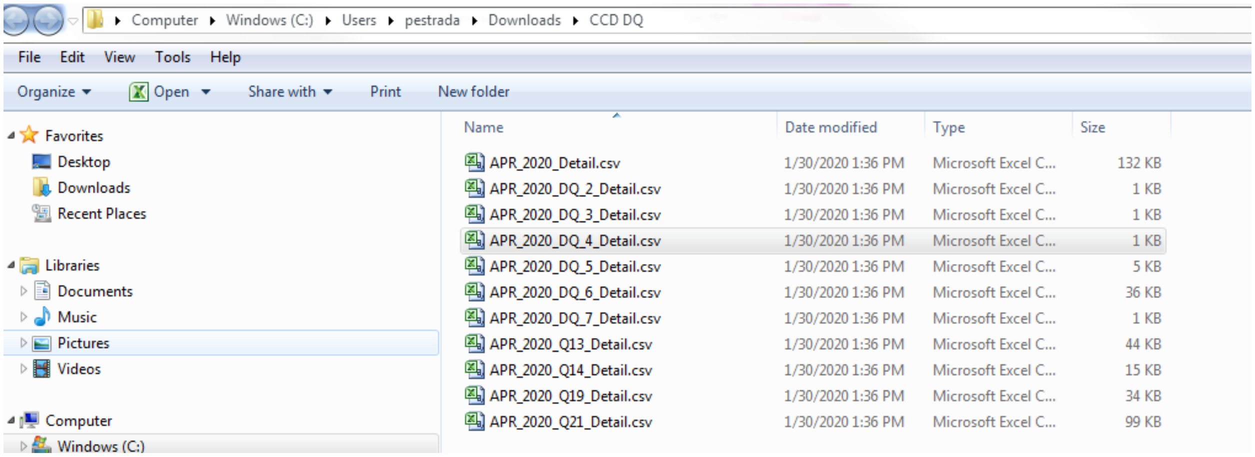
(Q5a)

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

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



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

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

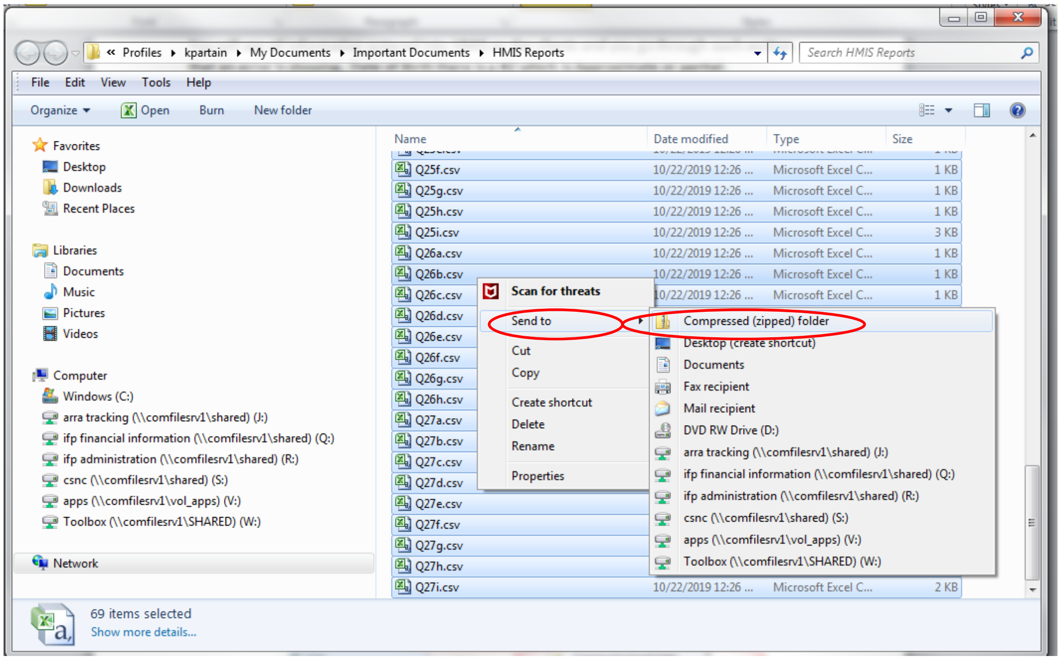
You will need to go into HMIS, bring up client ID, Edit Client and Correct the DOB Quality to Full DOB

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

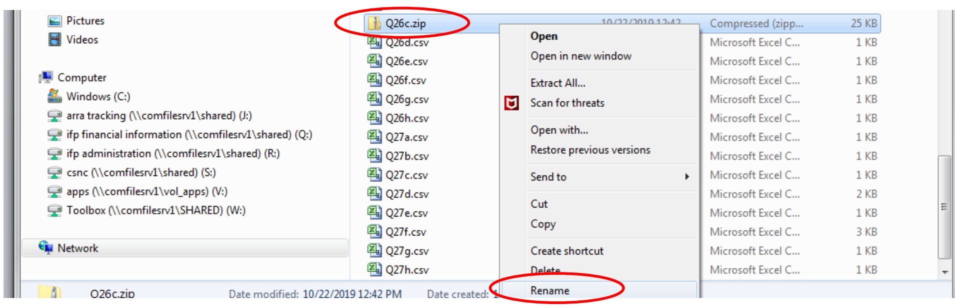
HMIS FY 2020 Data Dictionary https://files.hudexchange.info/resources/documents/HMIS-Data-Dictionary.pdf

HUD CoC APR and HUD ESG CAPER HMIS Programming Specifications https://files.hudexchange.info/resources/documents/HMIS-Programming-Specifications.pdf

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

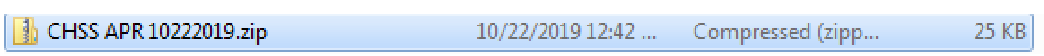


Highlight the zipped folder and right-click to Rename



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

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

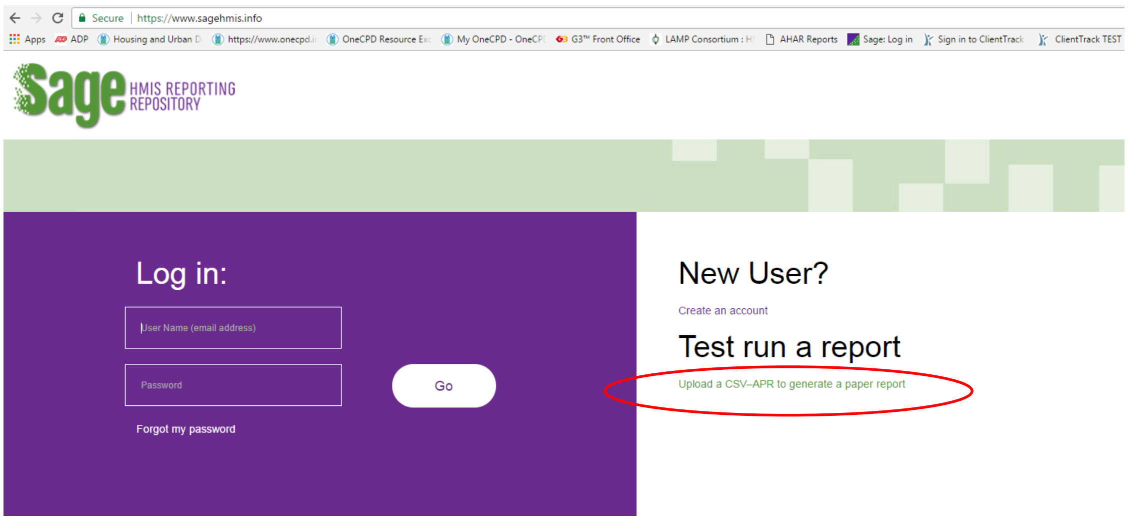


REMINDER: YOU CAN NOT CHANGE THE DATA IN THE EXCEL SPREADSHEET, YOU MUST CHANGE THE DATA IN HMIS

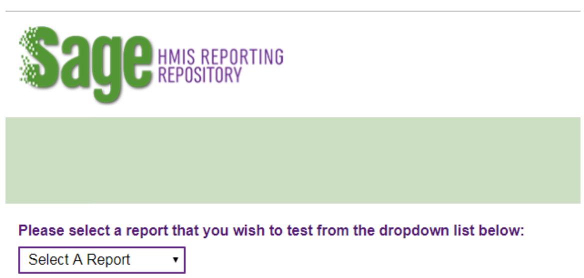
Verifying APR Report Data in Sage HMIS to Generate a Report

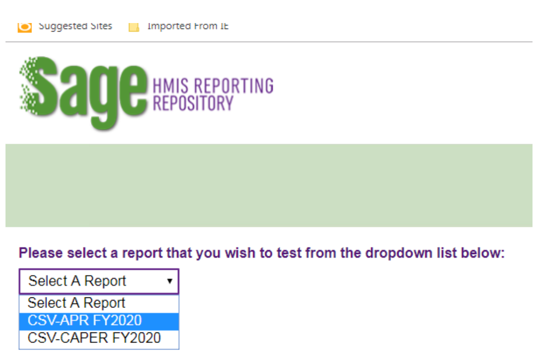
You do not need a log in to verify or generate your APR report in Sage HMIS.

www.sagehmis.info and click on the **Upload a CSV-APR** to generate a paper report link.

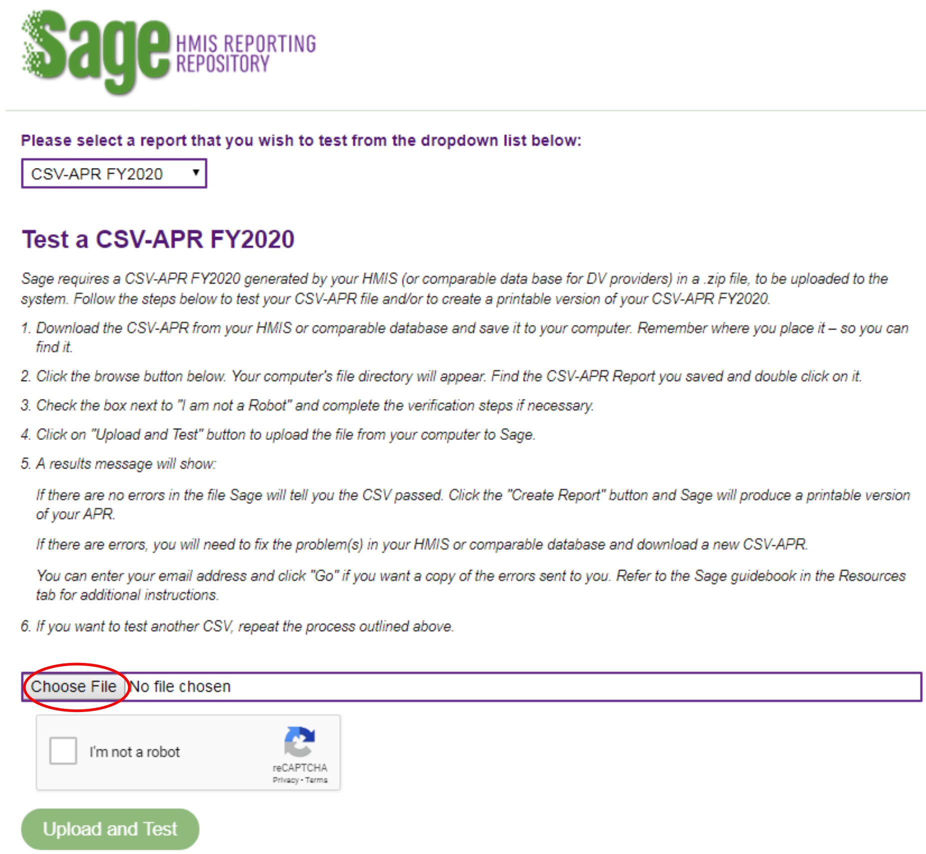


Click on **Select a Report** and choose **CSV-APR FY2020** from the drop-down menu

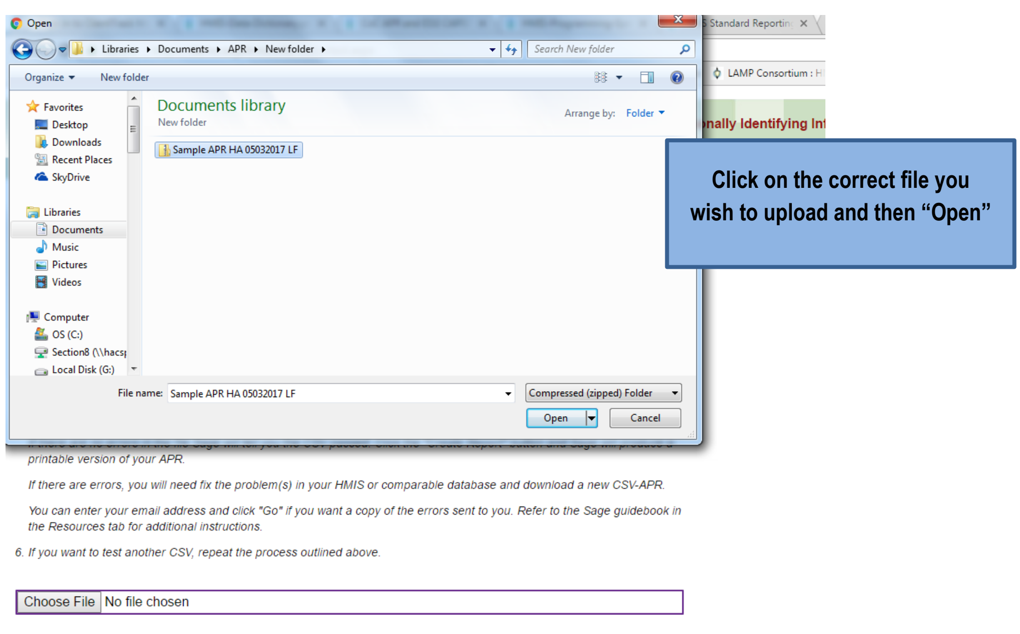




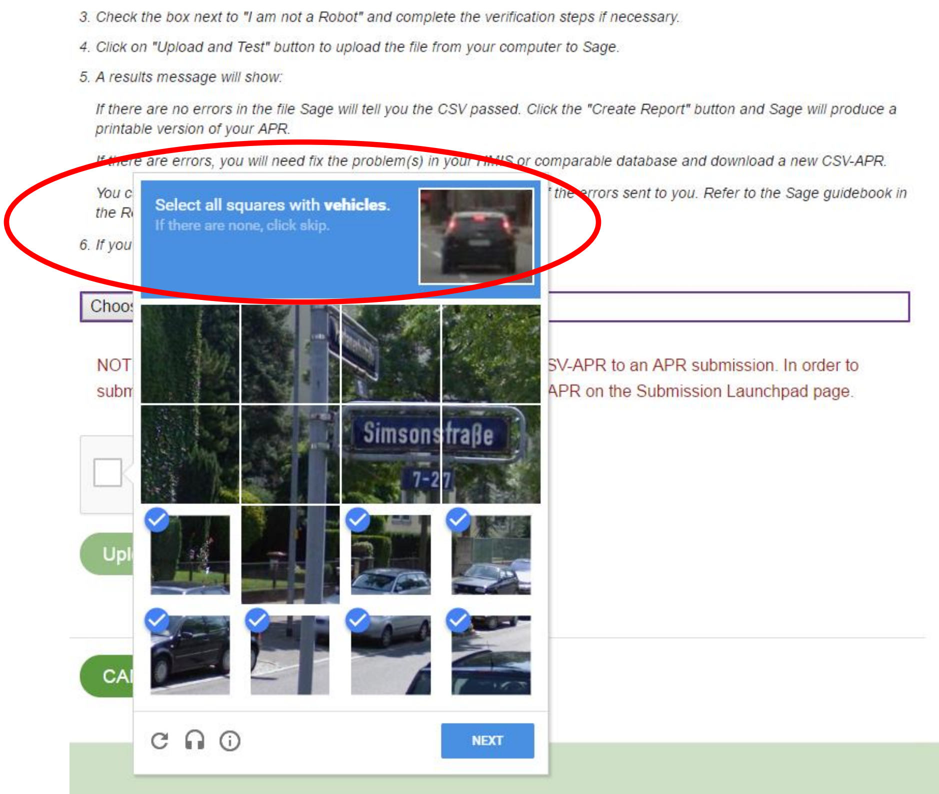
Then click on **Choose File** and when your Documents show, choose the file you want to upload, making sure it does not have client level data. Click on the correct file you wish to upload and then **Open**



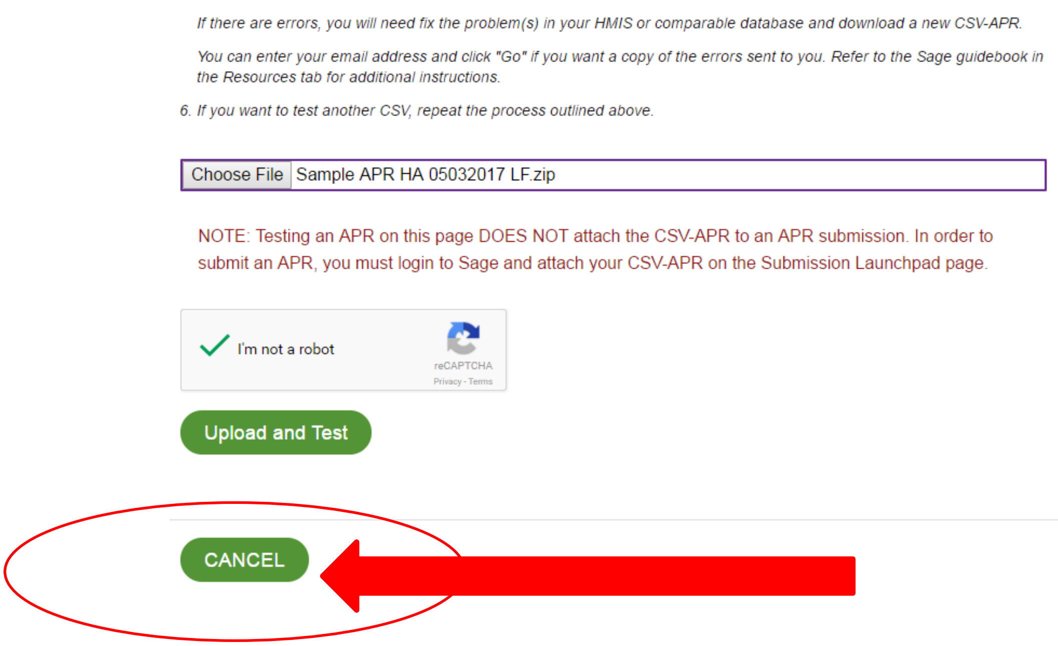
Your Documents will show, you will need to choose the file you want to upload making sure it does not have client level data



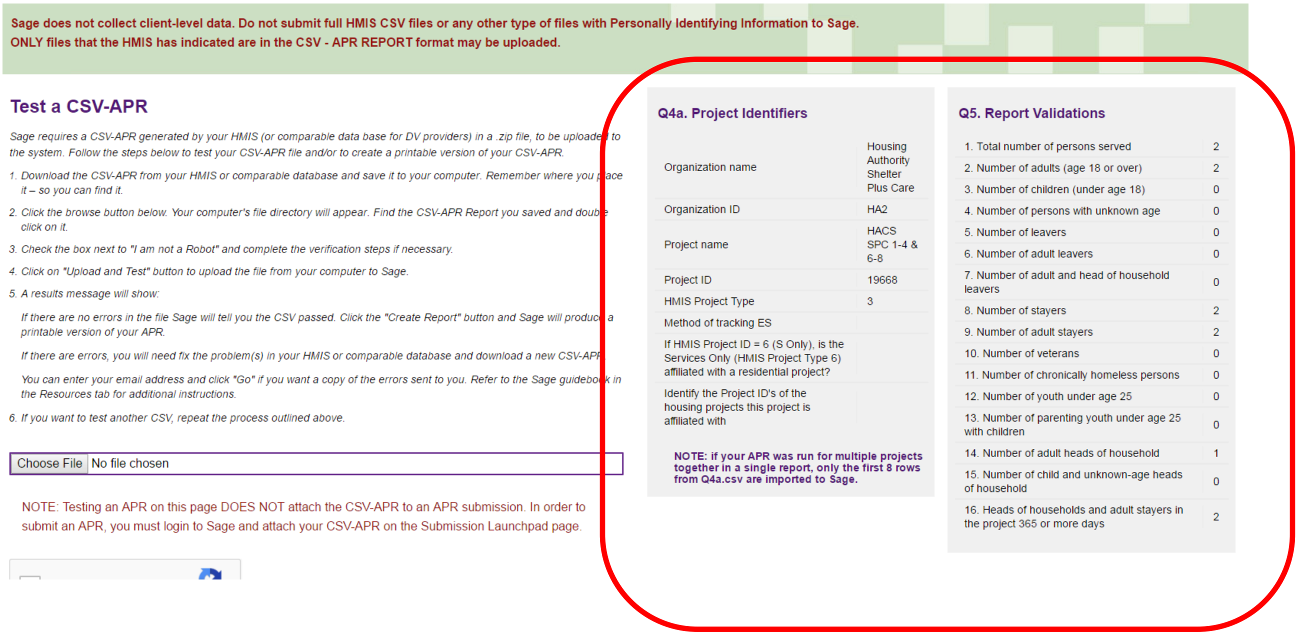
You will then have to click on “I’m not a robot” and answer the question



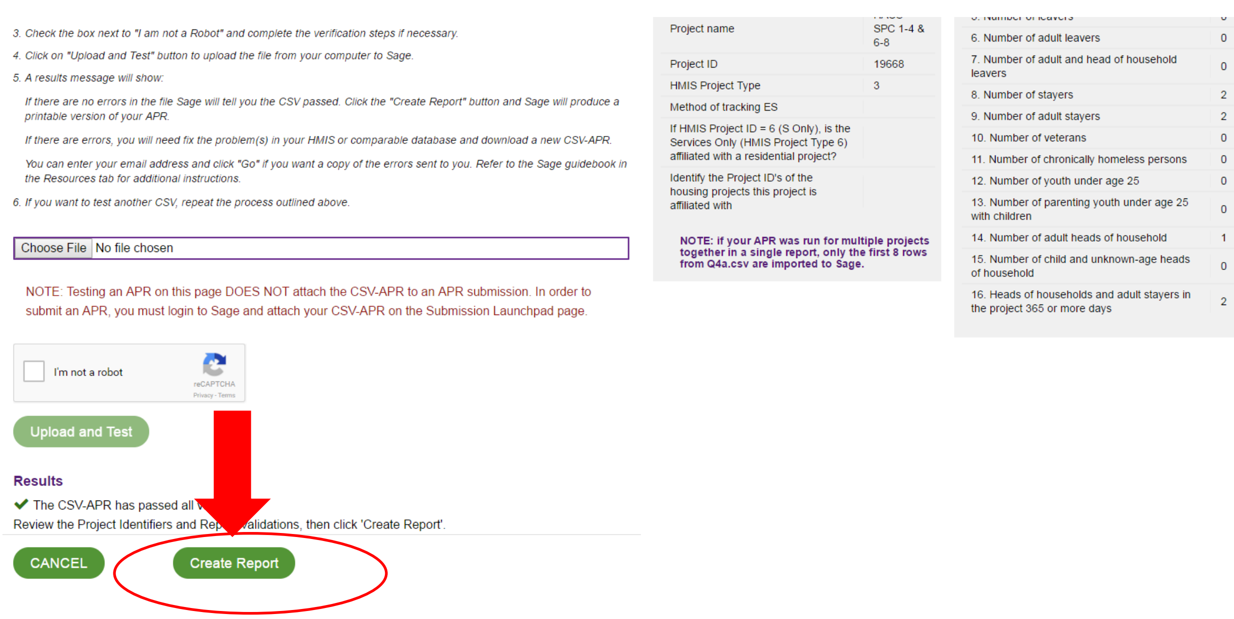
Then click on Upload and Test



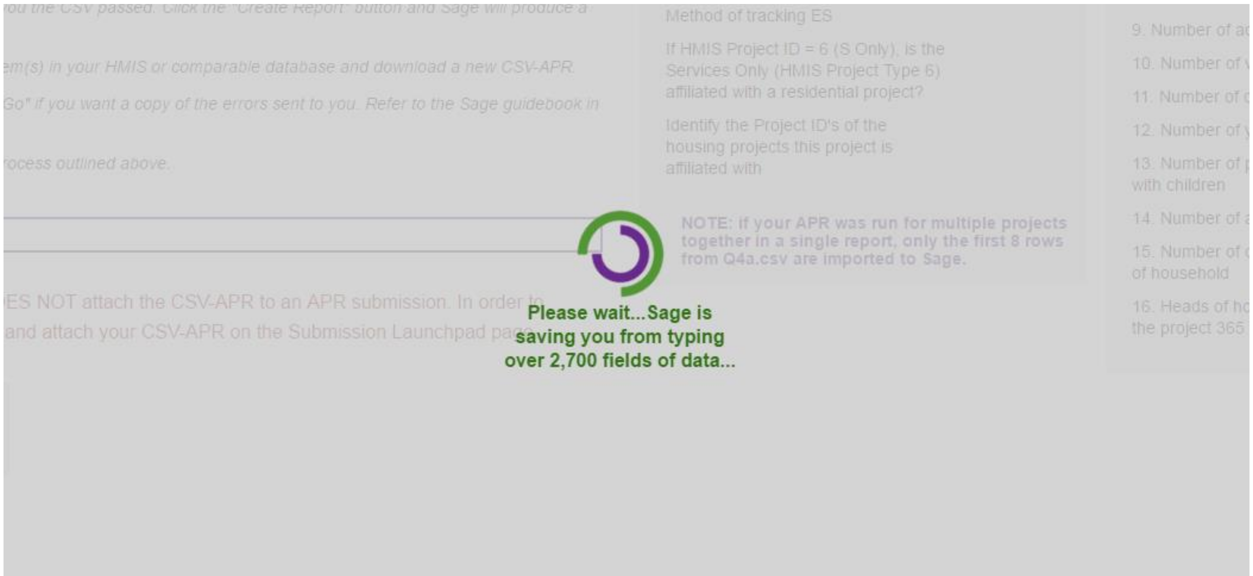
Your data will show to the right of the screen



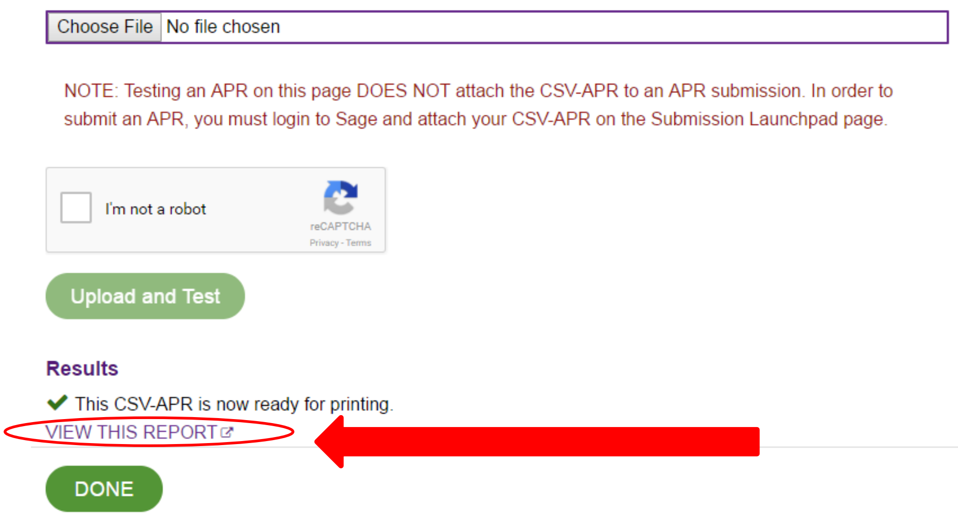
You can then create a report by clicking on the "Create Report" button



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

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

Q05a: Report Validations Table

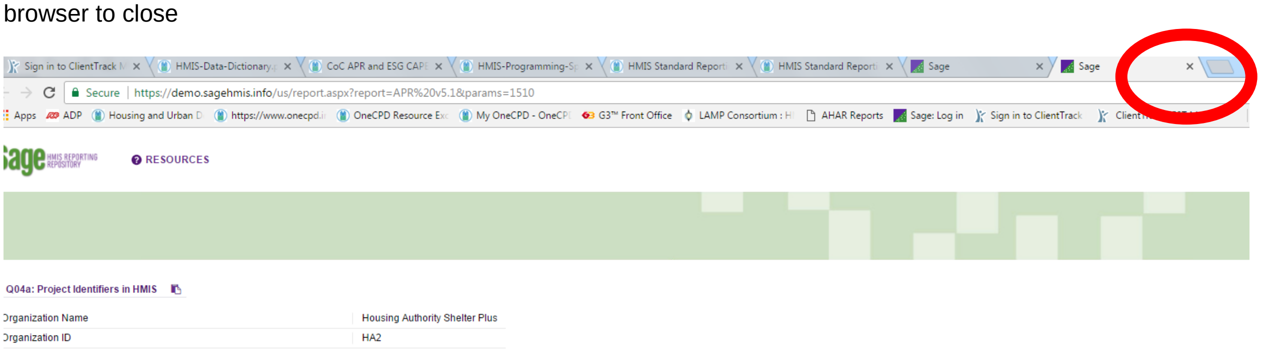
Total Number of Persons Served	32
Number of Adults (Age 18 or Over)	30
Number of Children (Under Age 18)	2
Number of Persons with Unknown Age	0
Number of Leavers	16
Number of Adult Leavers	15
Number of Adult and Head of Household Leavers	15
Number of Stayers	16
Number of Adult Stayers	15
Number of Veterans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

Q06a: Data Quality: Personally Identifying Information (PII)

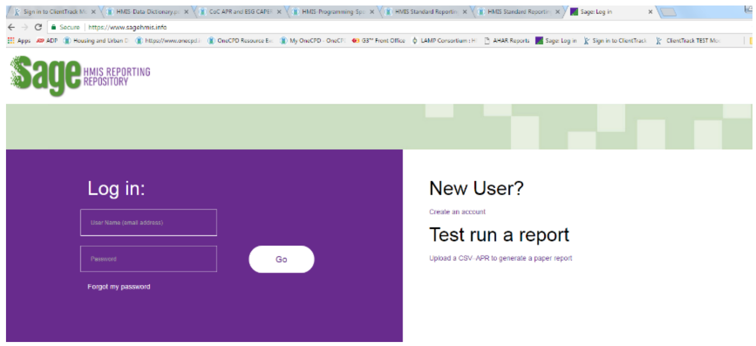
Data Element	Client Doesn't Know/Refused	Information Missing	Data Issues	% of Error Rate
Name	0	0	0	0.00 %
Social Security Number	0	0	0	0.00 %
Date of Birth	0	0	0	0.00 %
Race	0	0		0.00 %
Ethnicity	0	0		0.00 %
Gender	0	0		0.00 %
Overall Score				0.00 %

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



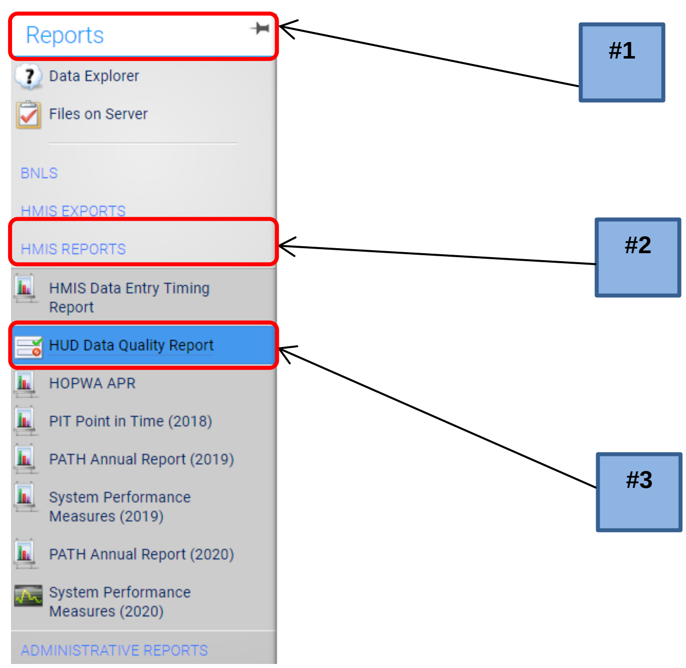
Once complete, it will take you back to the Sage HMIS home page



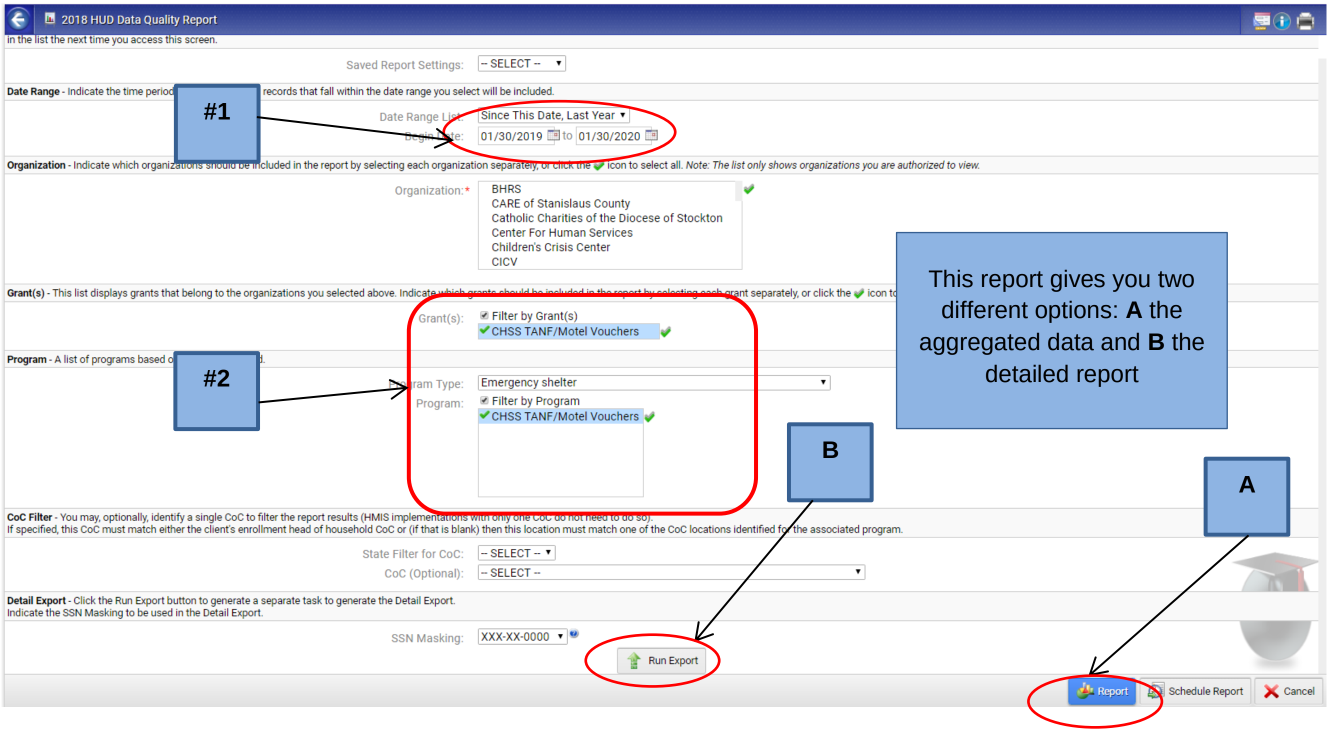
REMINDER: YOU CAN NOT CHANGE THE DATA IN SAGE HMIS, FOR ANY DATA ISSUES, YOU MUST CHANGE THE DATA IN HMIS

HUD Data Quality Report

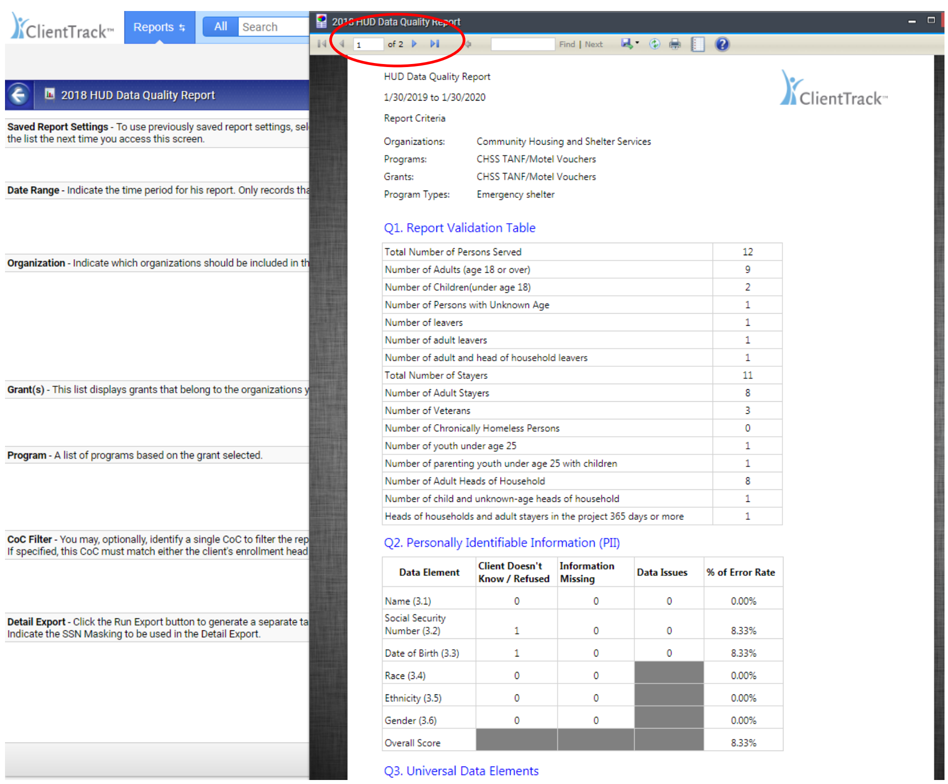
From the Reports Workspace>HMIS Reports> HUD Data Quality Report



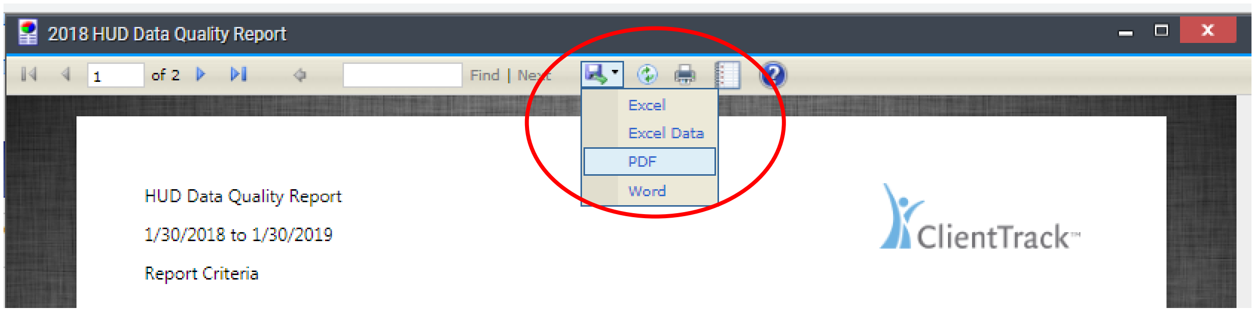
#1. Select Begin Date Range
#2. Choose Grants, Program Type, Program



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



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



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

DQ Detail Export

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

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

Report **#B** 

will give you the detailed report.

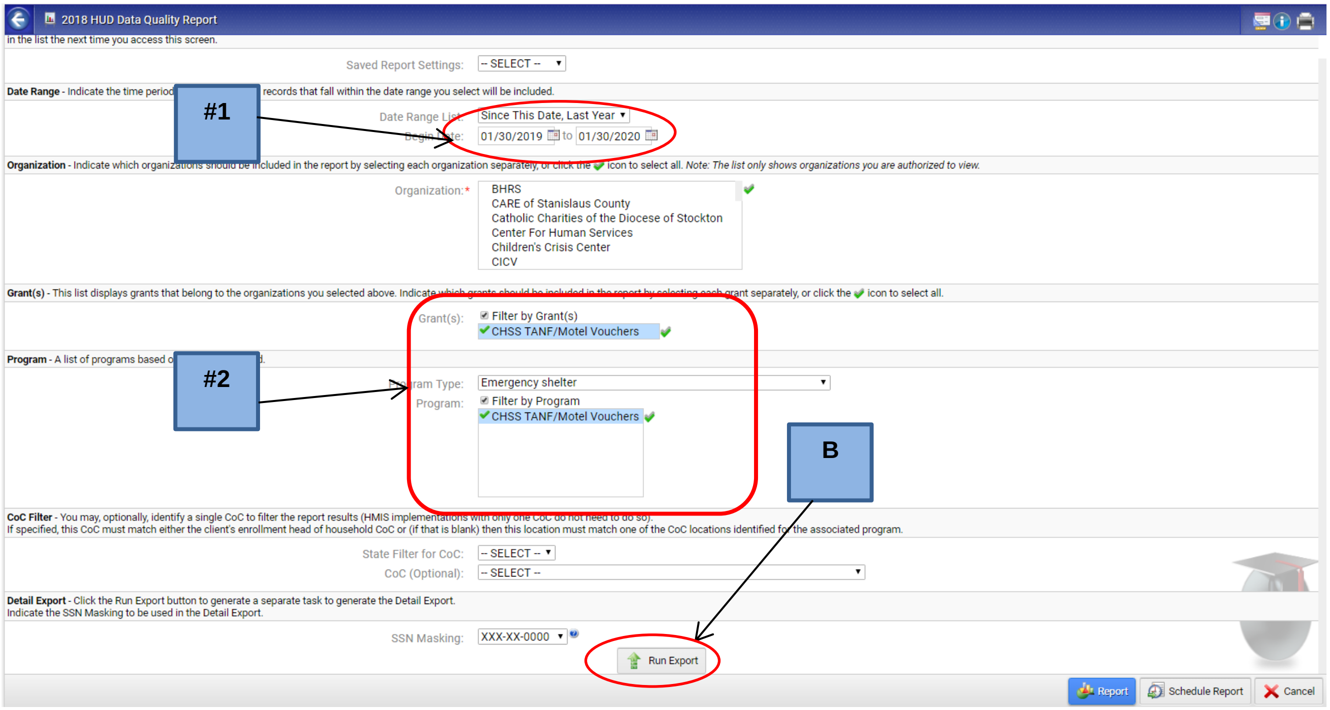
Note: This report can be generated for multiple projects at once

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

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

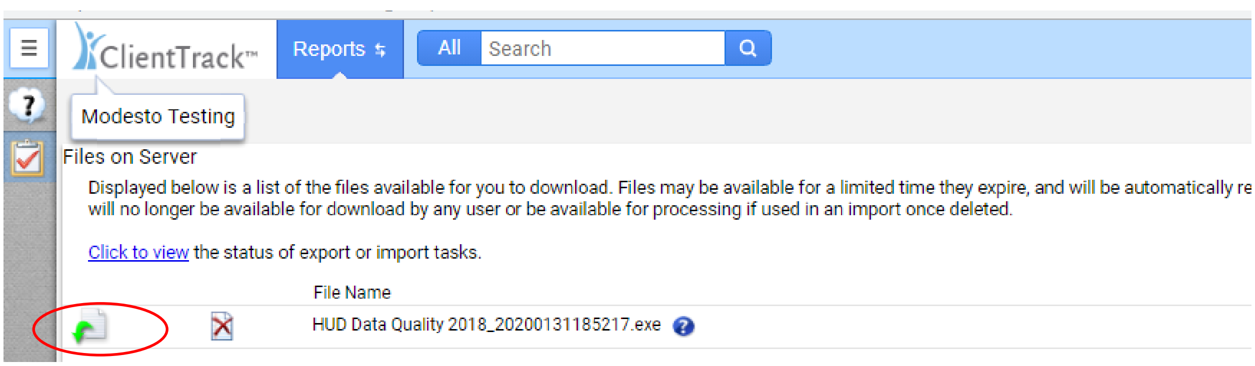
From the Reports Workspace>HMIS Reports> HUD Data Quality Report

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

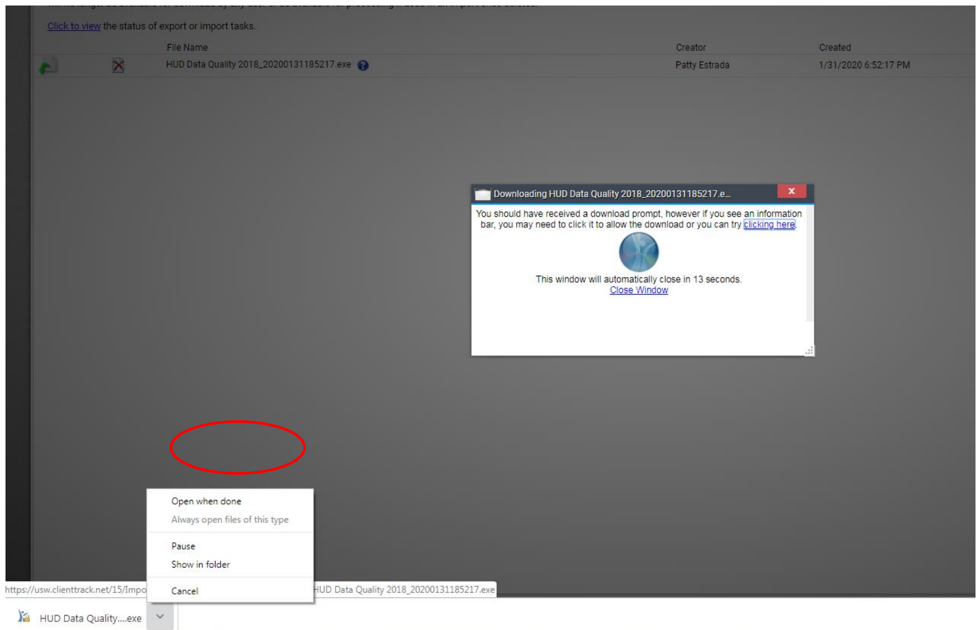


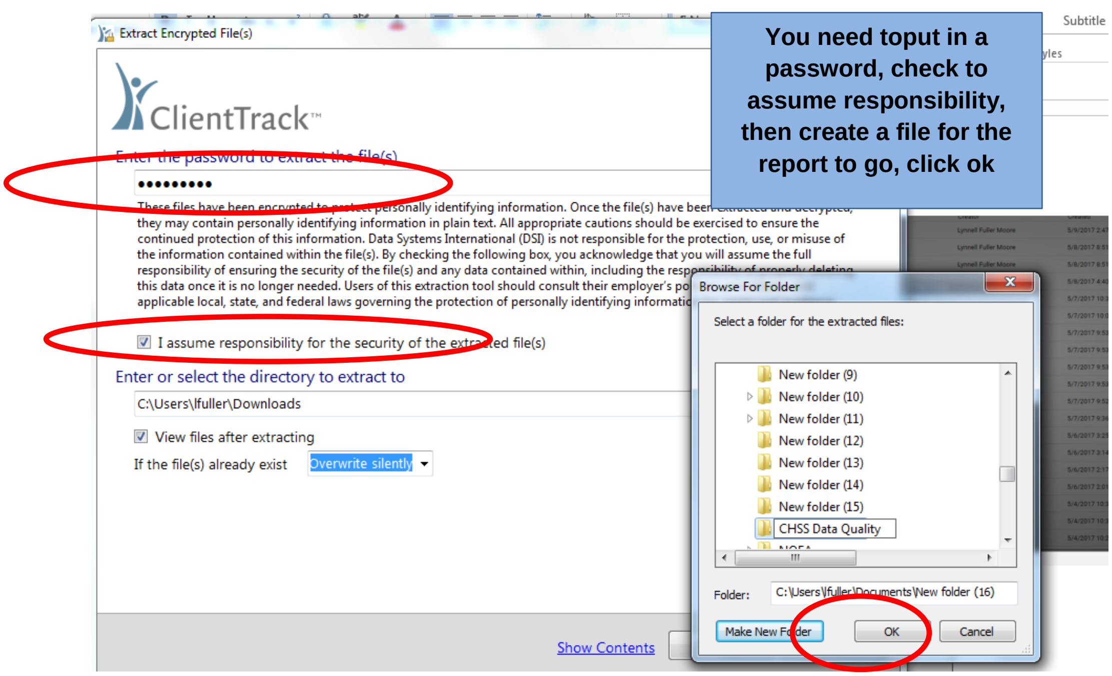
After setting your report filters and click Run Export, you can monitor the progress of the export on Asynchronous tasks. Please remember to refresh the Files on Server and Asynchronous tasks pages periodically if you are waiting on the export to finish.

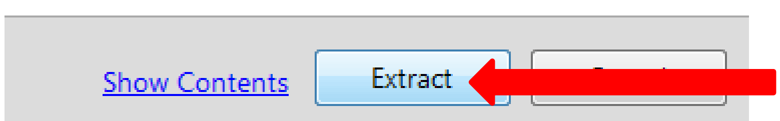
Once your report is ready, select the green arrow to download



Download the file, then open







Click Extract

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

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

Data (Validation Only) shows all clients data

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

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

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

Using the Detail Export

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

HMIS Standard Reporting Terminology Glossary

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

HMIS CSV Format Specifications V6.1

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

HMIS Data Standards Data Dictionary Version 1.2

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

No/Yes/Missing

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

Project Type|

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

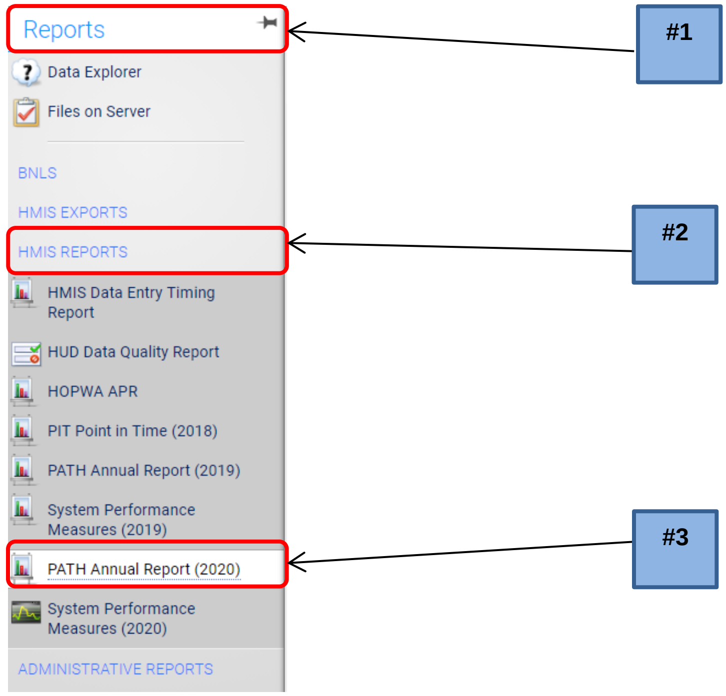
Relationship to Head of Household

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

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

2020 Annual PATH Report

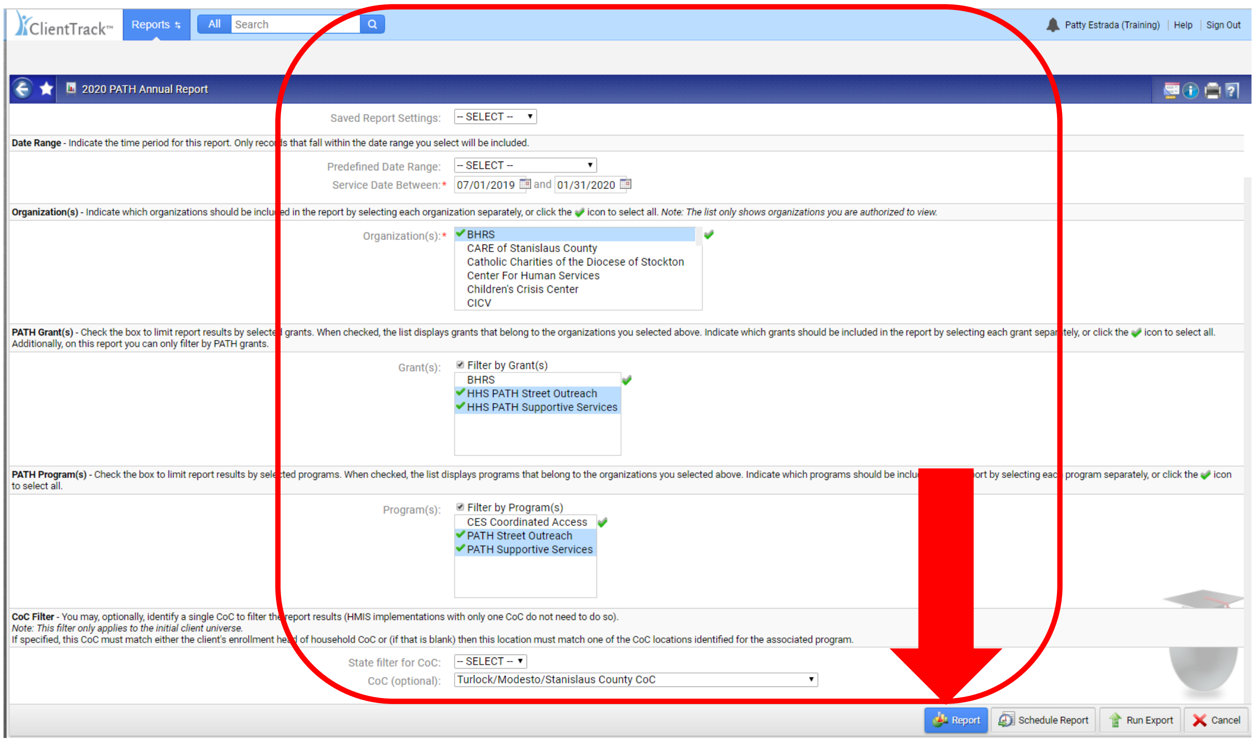
From the Reports Workspace>HMIS Reports>PATH Annual Report 2020



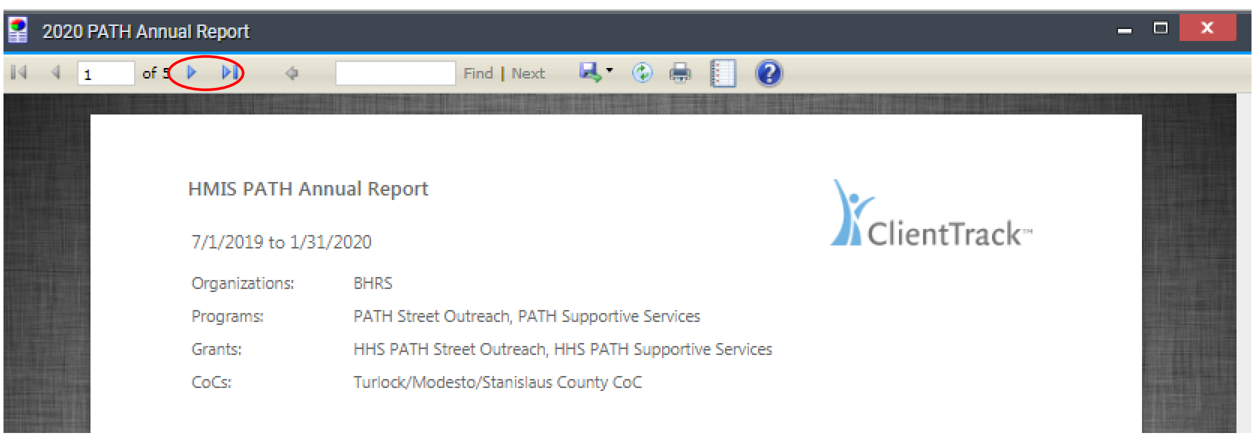
Running the Report: The report dates you set identify the date range to find active clients. Active clients are those with a project stay in the date range and have a contact, Date of Engagement, Date PATH Status Determined, or PATH Funded service entered in the date range. Similar to other compliance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

Complete all data fields, making sure your report shows

Complete all fields



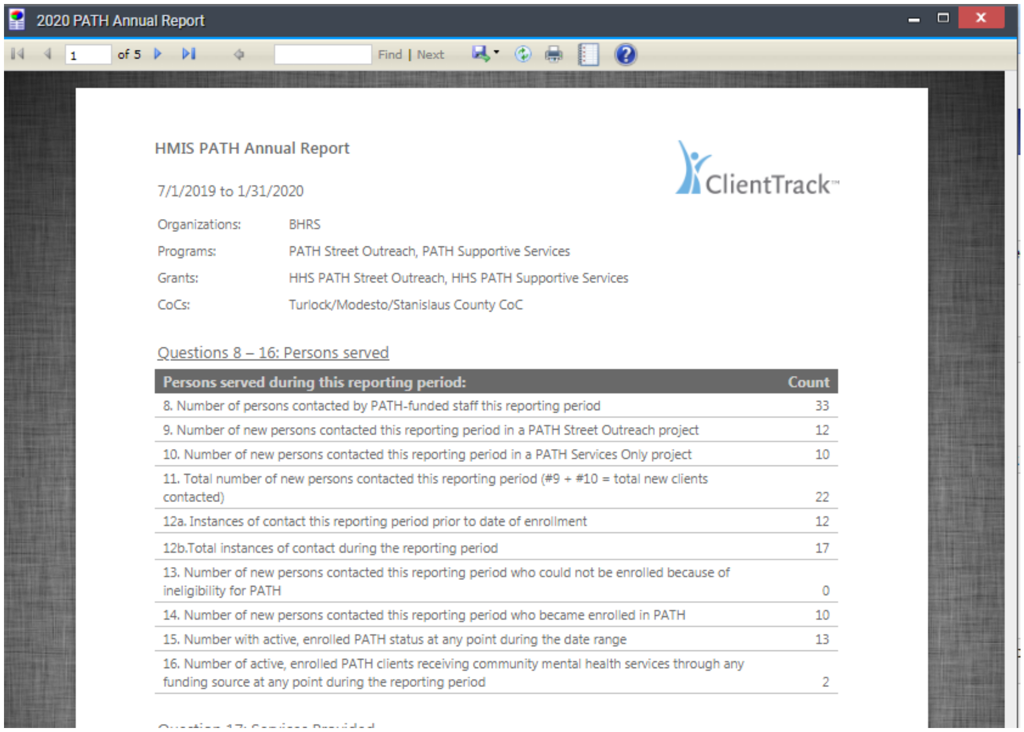
The report will generate, to view the additional pages, click on the arrow



PATH Annual Report Output

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

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



HMIS PATH Annual Report

7/1/2019 to 1/31/2020

Organizations: BHRS

Programs: PATH Street Outreach, PATH Supportive Services

Grants: HHS PATH Street Outreach, HHS PATH Supportive Services

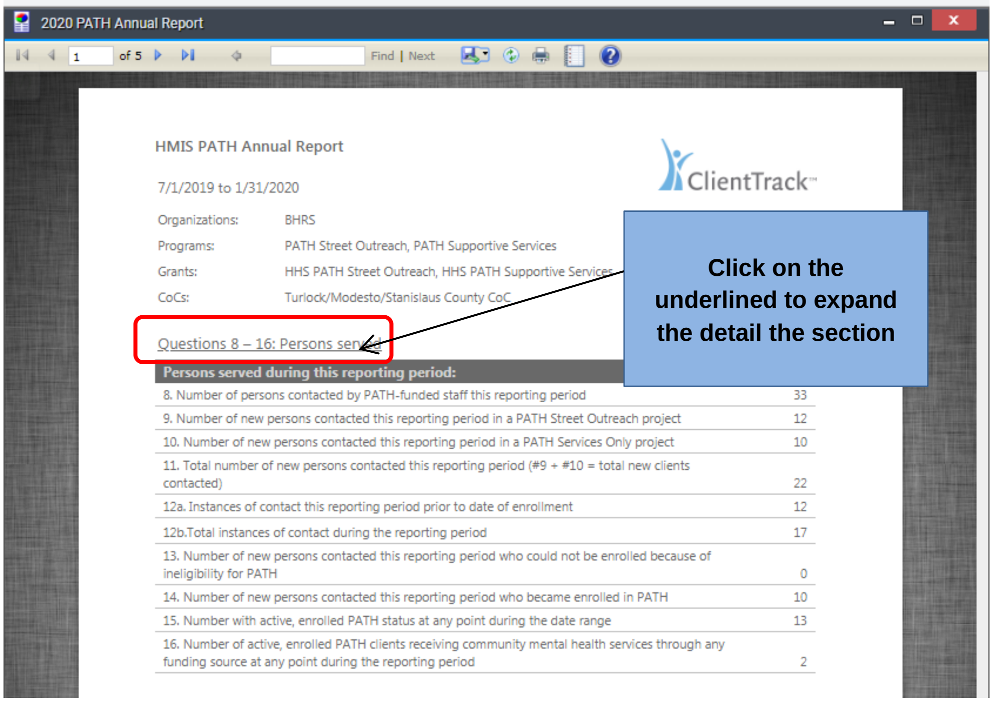
CoCs: Turlock/Modesto/Stanislaus County CoC

Questions 8 – 16: Persons served

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

Accessing Client Level Data

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



2020 PATH Annual Report

HMIS PATH Annual Report

7/1/2019 to 1/31/2020

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

Click on the underlined to expand the detail the section

Questions 8 – 16: Persons served

Persons served during this reporting period:	
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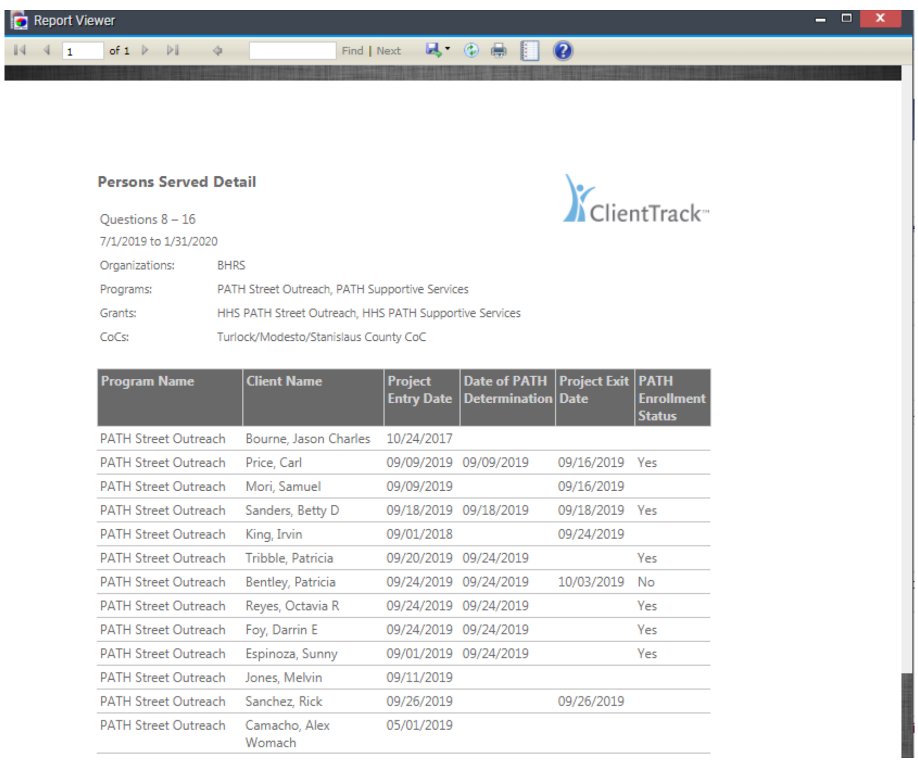
15. Number with active, enrolled PATH status at any point during the date range	13
16. Number of active, enrolled PATH clients receiving community mental health services through any funding source at any point during the reporting period	2



Report Viewer

Persons Served Detail

ClientTrack

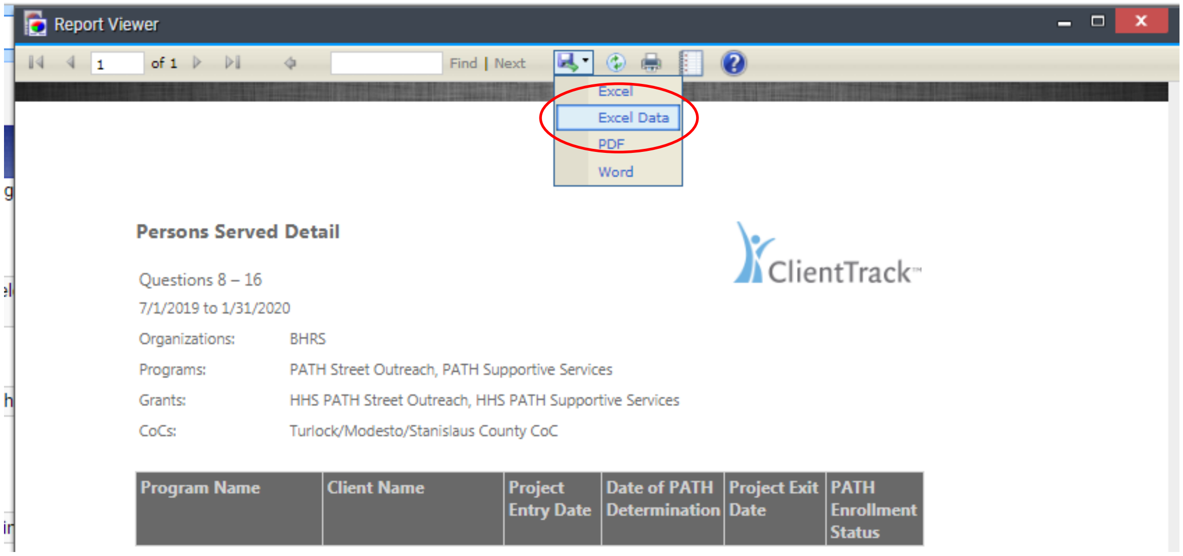
Questions 8 – 16

7/1/2019 to 1/31/2020

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

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

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



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Organizat	ProgramN	ProgramID	ProgramT	CaseID	CaseName	ClientID	ClientNan	BirthDate	Age	SSNQualit	Race_Ame	Race_Asia	Race_Blac	Race_Nati	Race_Whi	Race_Clie	Race_Clie
2	BHRS	PATH Stre	19581	Street out	8338	Ohmsford	10823	Ohmsford	Full DOB F	19	Full SSN	Yes	No	No	No	No	No	No
3	BHRS	PATH Stre	19581	Street out	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	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	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	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	8511	Dirk, Simc	10917	Dirk, Simc	Full DOB F	25	Full SSN	No	No	Yes	No	No	No	No
8	BHRS	PATH Stre	19581	Street out	8555	Smith, Joe	10646	Smith, Joe	Full DOB F	19	Full SSN	No	No	No	No	Yes	No	No

Service and Referrals Provided

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

Question 17: Services Provided

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

Report Viewer

Service and Referrals Provided Detail Report

ClientTrack™

Questions 17 – 18

7/1/2019 to 1/31/2020

Organizations: BHRS

Programs: PATH Street Outreach, PATH Supportive Services

Grants: HHS PATH Street Outreach, HHS PATH Supportive Services

CoCs: Turlock/Modesto/Stanislaus County CoC

Organization	Program Name	Client Name	Most Recent Service Date
BHRS	PATH Street Outreach	Espinoza, Sunny	9/24/2019
BHRS	PATH Supportive Services	Johnson, Steven	8/10/2019
BHRS	PATH Supportive Services	Kellett, Carol	9/25/2019
BHRS	PATH Supportive Services	Railey, Courtney	9/24/2019

ClientTrack™ Reports Page 1 of 1 1/31/2020 4:33:17 PM

A	B	C	D	E	F	G	H	I	J
Type	Organization	ProgramName	ProgramID	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

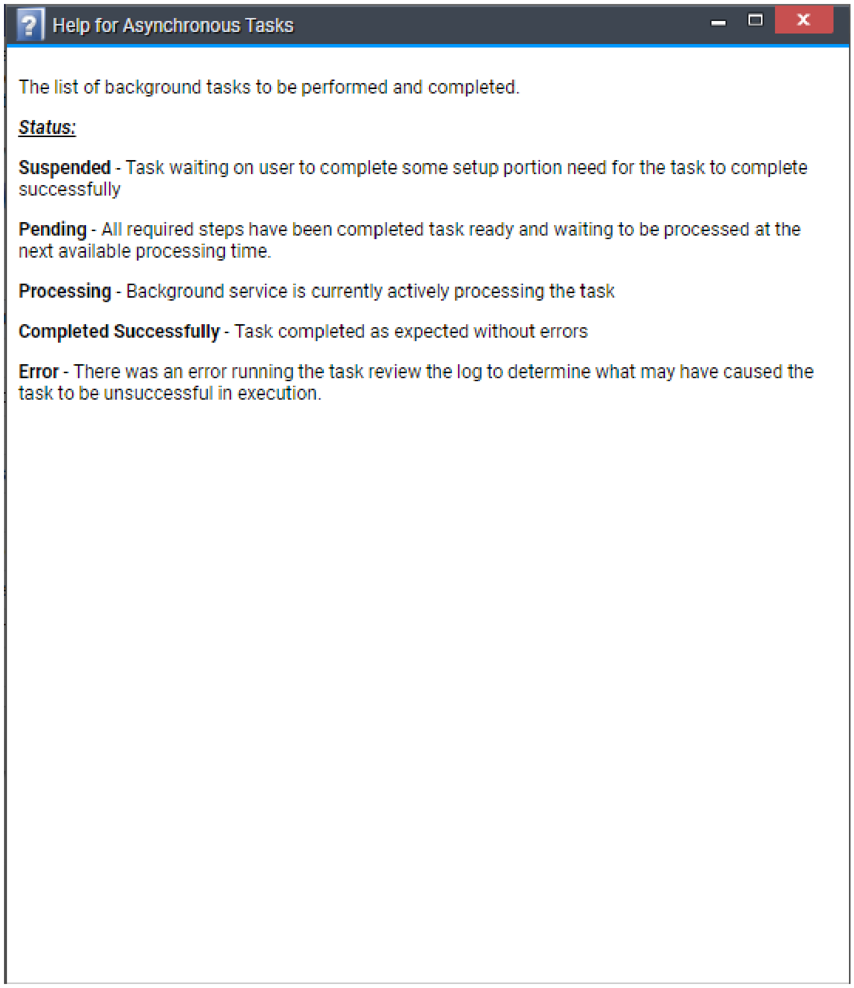
PATH ANNUAL REPORT MANUAL

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

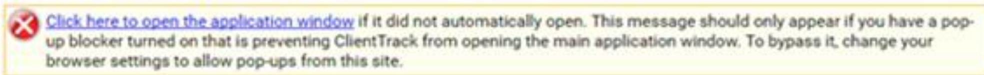
Key to Asynchronus Tasks



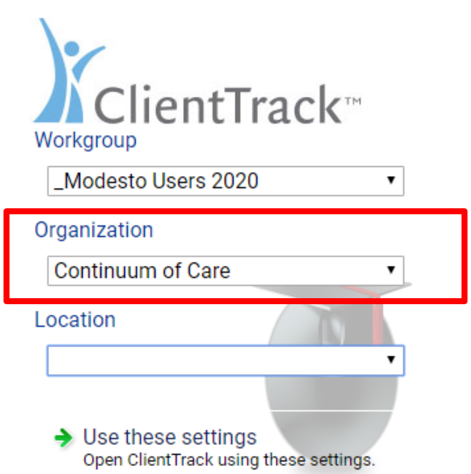
CES Coordinated Access Data Entry

Logging into ClientTrack

Turn off "Pop-up Blockers"



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



Make sure you are in Workgroup:

_Modesto Users 2020

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

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

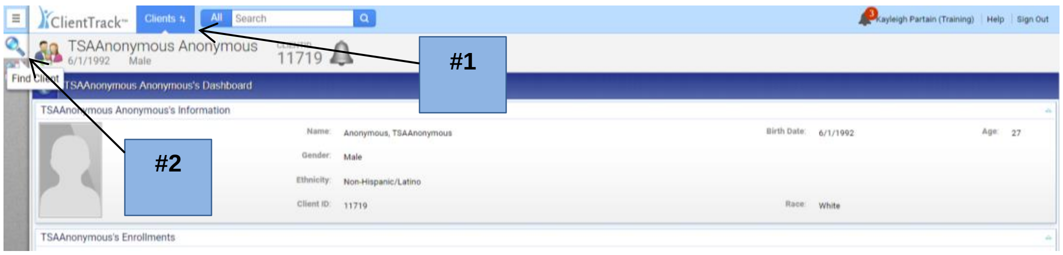
Client Data Entry

Finding/Adding Client

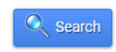
Make sure you have a signed HMIS ROI (Release of Information) from the Client

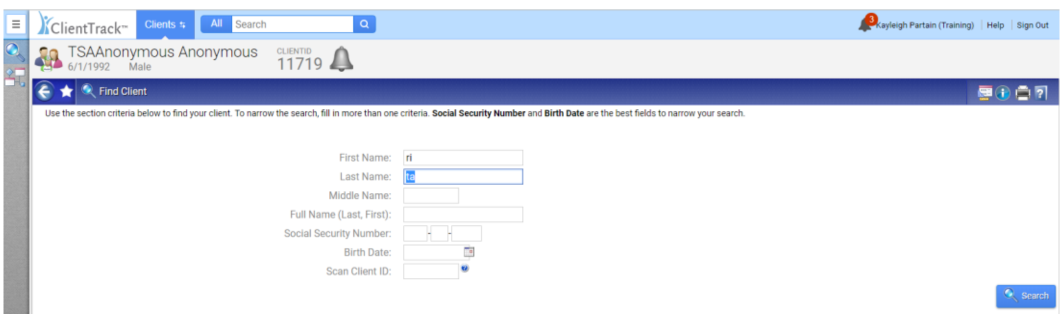
#1. Make sure you are on the **Client Workspace** if you are ready to start entering a client into the system

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



When searching for a client; always remember **"Less is best"**

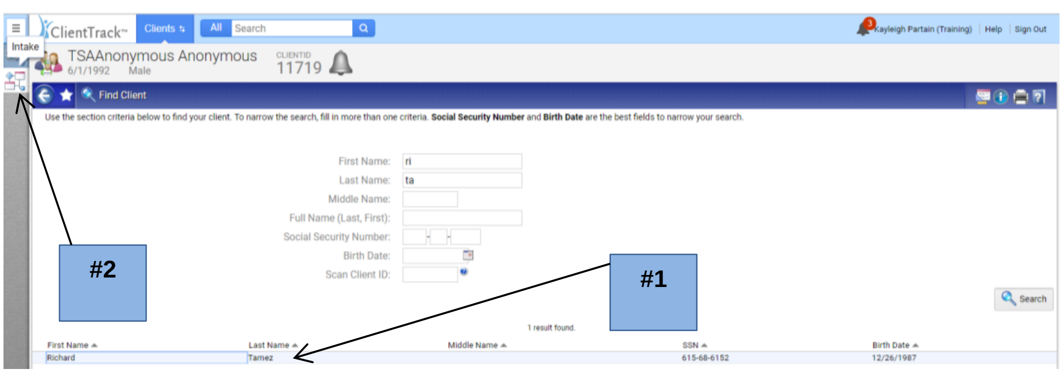
Use the first few letters of the first & last name to narrow the search, and then click 



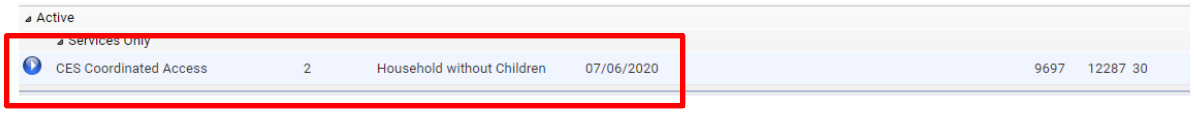
The system will give a list of names matching your search

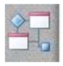
#1. If the correct name appears, highlight and click the correct name below or

#2. If the correct name is not listed, start **Intake** using the icon on the top left to proceed with Coordinated Entry client intake workflow.

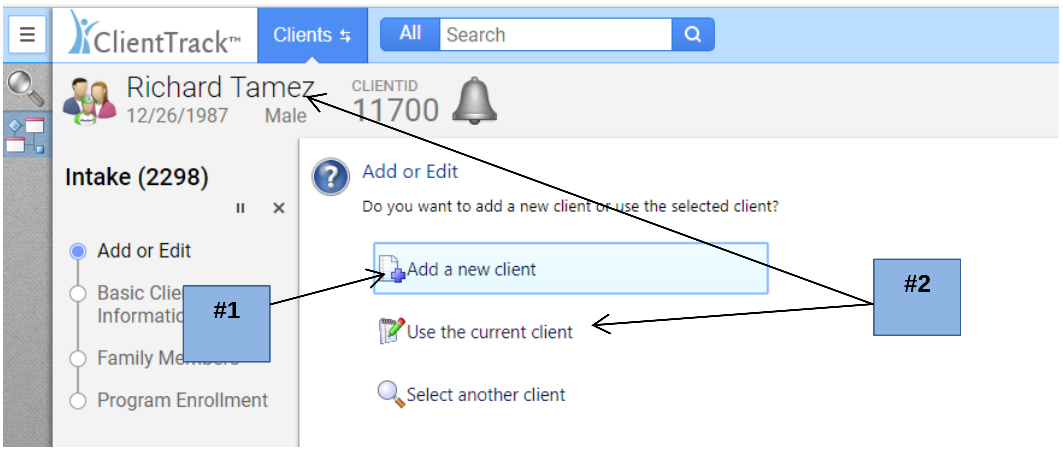


If client is in HMIS, make sure they are not already enrolled in the CES Coordinated Access Project



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

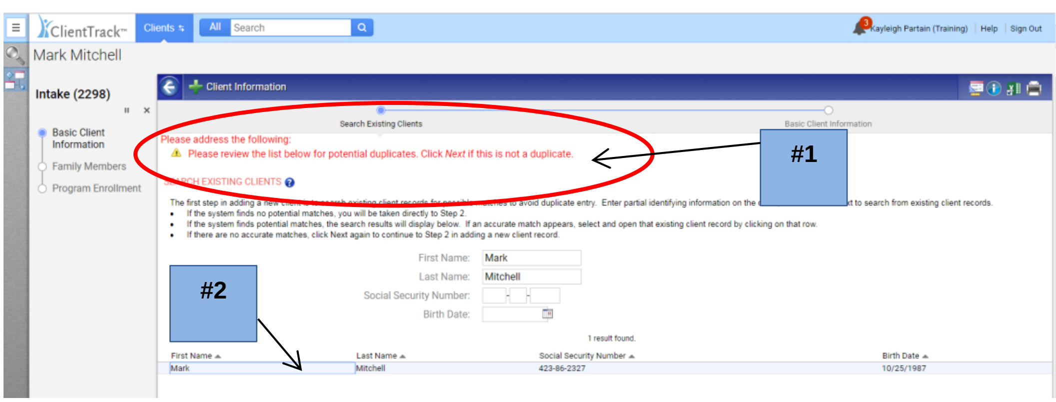
#1. If the client is not found in the system through search, then click **Add a new client**
#2. If the client was found through your search and you clicked on the name, they will appear in the header. Only click **Use the current client** if the client's name is showing in the header



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

#1. The system will let you know if any potential duplicates exist, verify new client and proceed by clicking 

#2. If the correct client name does appear, click on the name that matches your Intake Packet to proceed, then click 

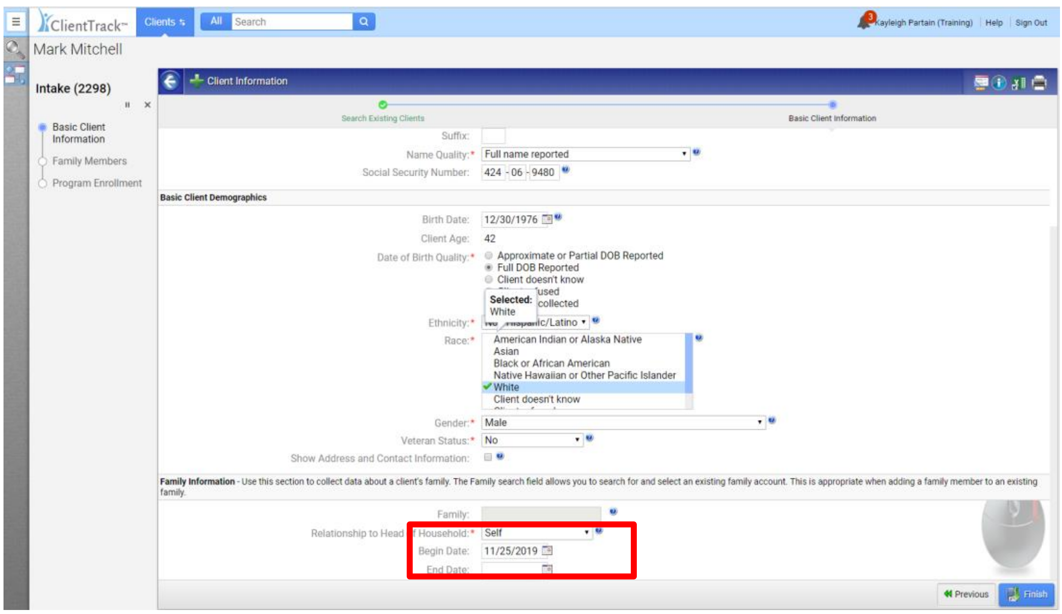


Starting at the top, complete all required fields. *

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

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

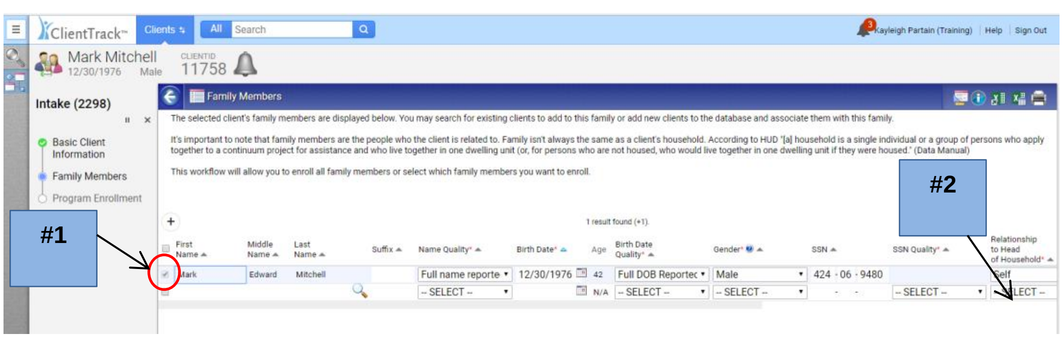
Once you get to the **Family Information** end of the **Basic Client Information** screen, you will change the **Begin Date** to the Date of Enrollment found on the Intake Packet. This will track the last signed ROI in HMIS.



Adding Family Members

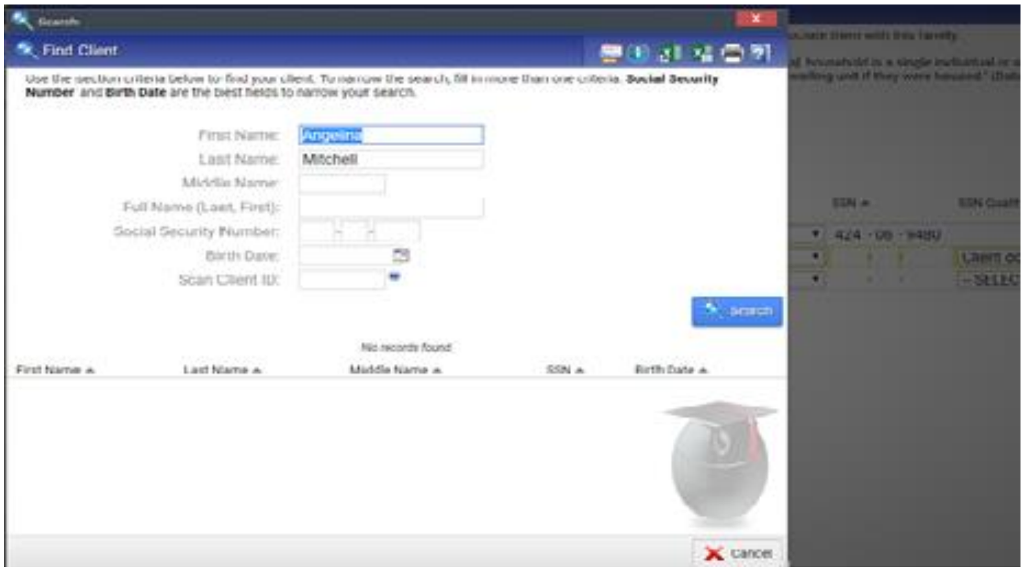
#1. To add additional family members, Click on the box to add family member (only if additional family member is not already listed)

#2. Making sure you then tab or scroll to the far right to complete all the fields. If you do not have any family members to add, click 



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

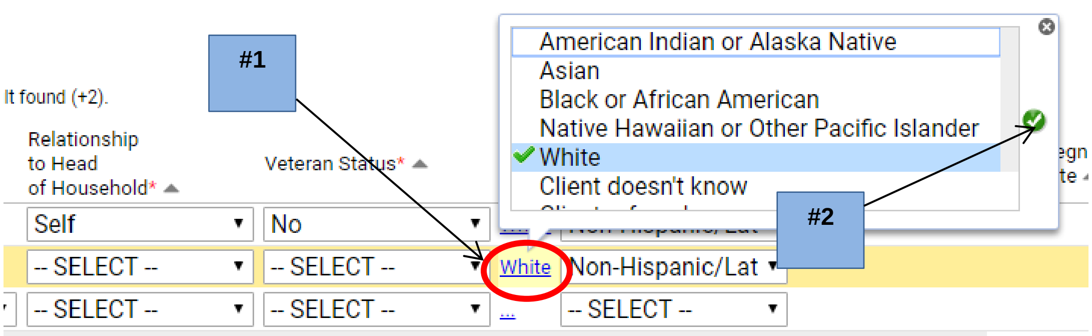
in the search window and proceed entering the new household's information

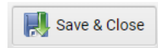


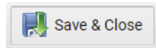
Pay close attention to the **Race** and **Ethnicity** fields when adding household members. They will default to the Head of Household selections. If you need to change the **Race**

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

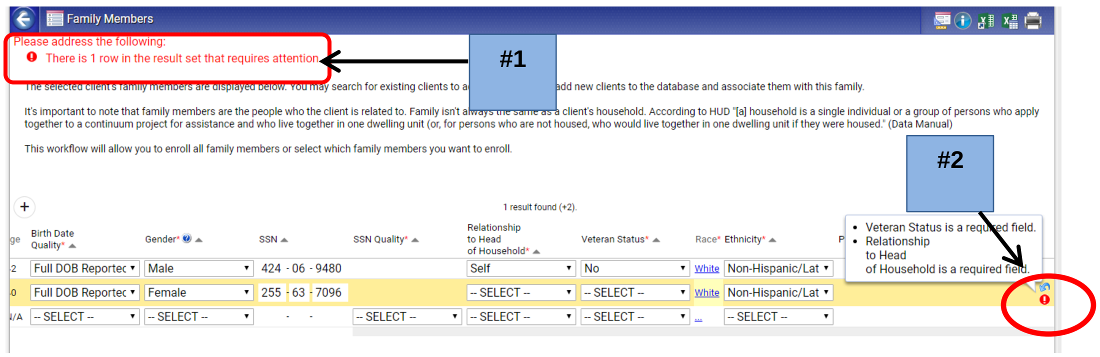
#2 click on the green circle with the check mark



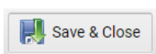
#1. If you are alerted to an error after selecting 

#2. Scroll all the way to the right and hover over the red circle with an exclamation point. Go back and address the issues then choose 

again.



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

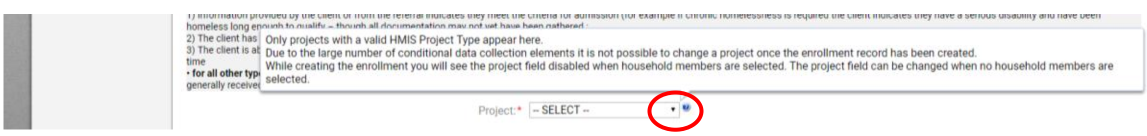


Save & Close: Will save the changes made to the screen and move to the next page.

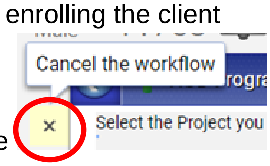
Project Enrollment

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

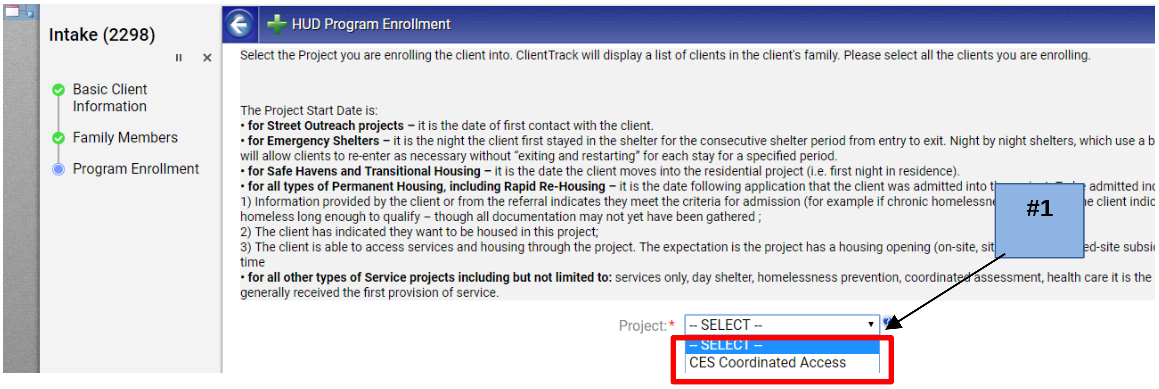


You will only see the options in the drop-down list that your organization has access to or what Programs they are set up for. If you do not find your Program option when enrolling the client

PLEASE DO NOT CONTINUE. Cancel your workflow by clicking the 

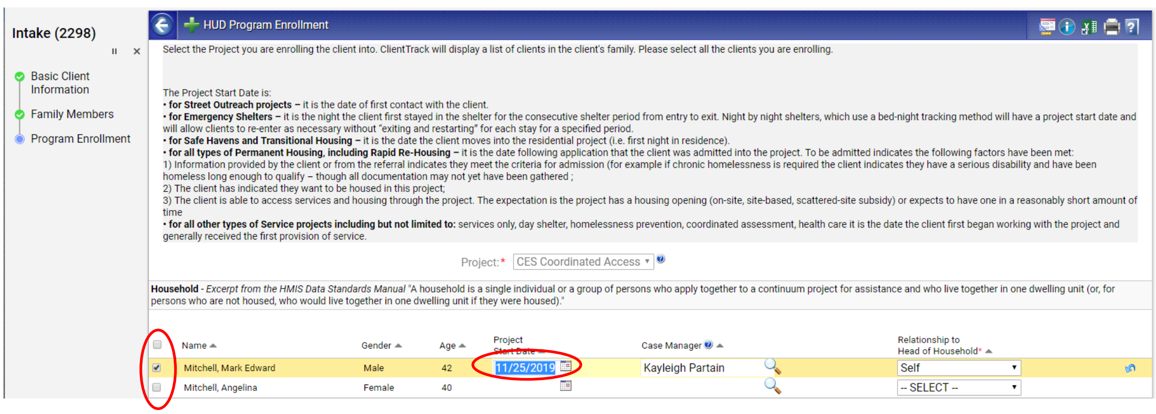
Contact your HMIS System Administrator (209) 558-3676

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



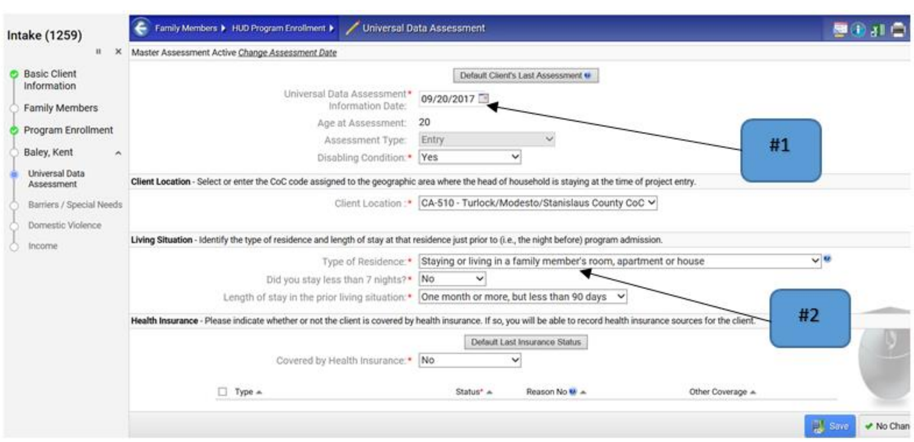
#1. Click on the box to the left of all persons you want to enroll in this program

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



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.

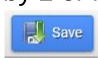


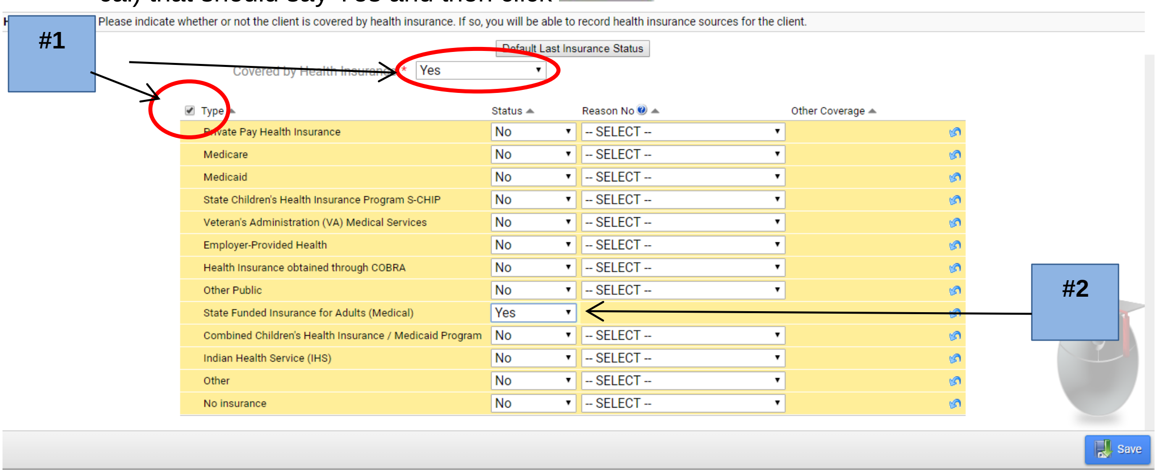
Living Situations

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

Health Insurance

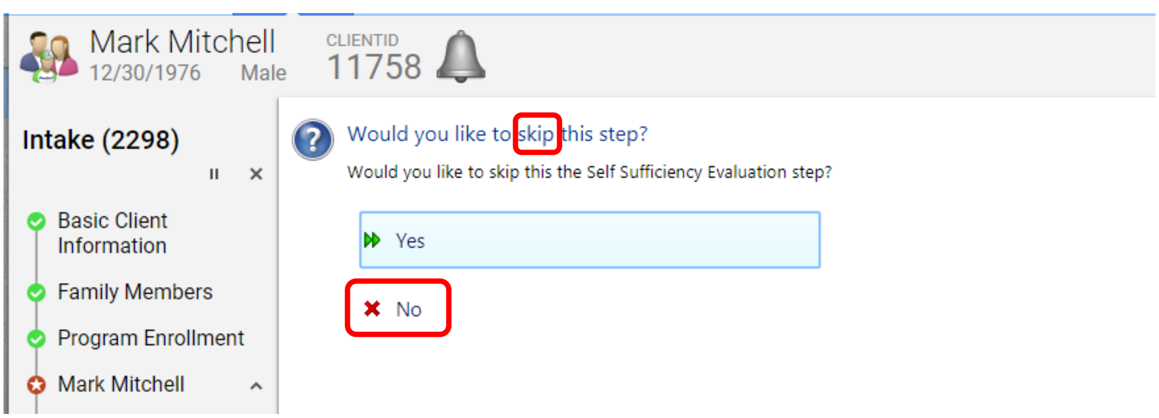
#1. If you mark yes to **Covered by Health Insurance**, you must have an answer on all in the status field. Click the box in the top left to select all. This will mark No on all options.

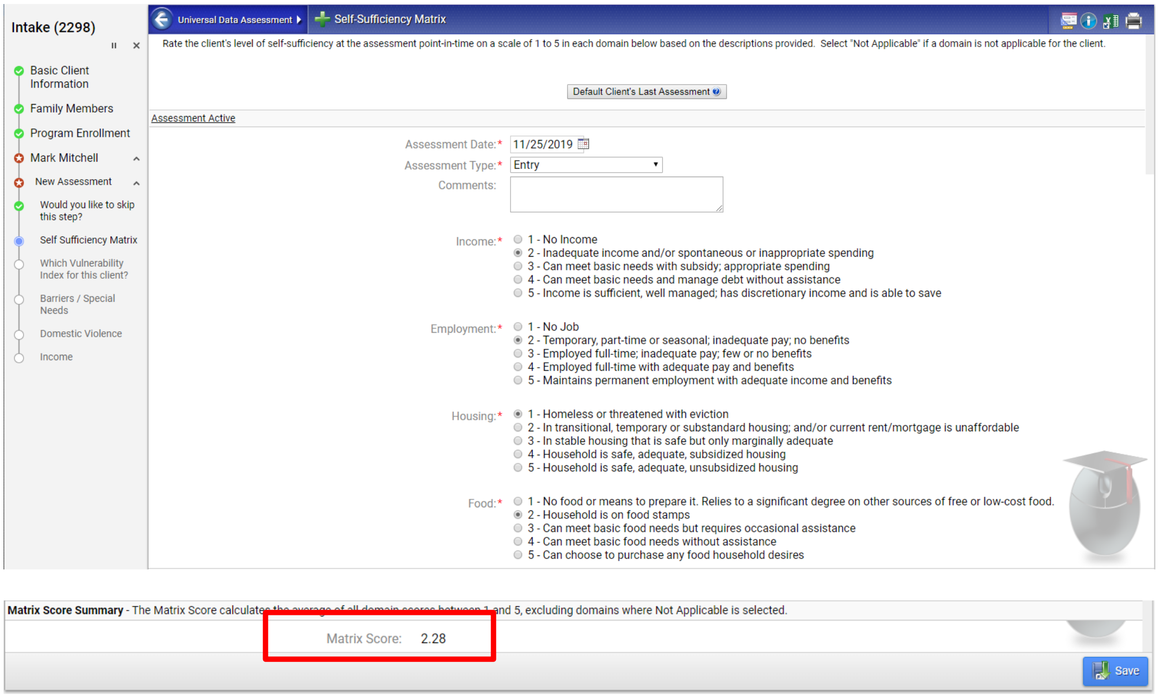
#2. Change the one (or multiple if covered by 2 or more insurances such as Medicare and Medi-cal) that should say Yes and then click 



Self-Sufficiency Matrix

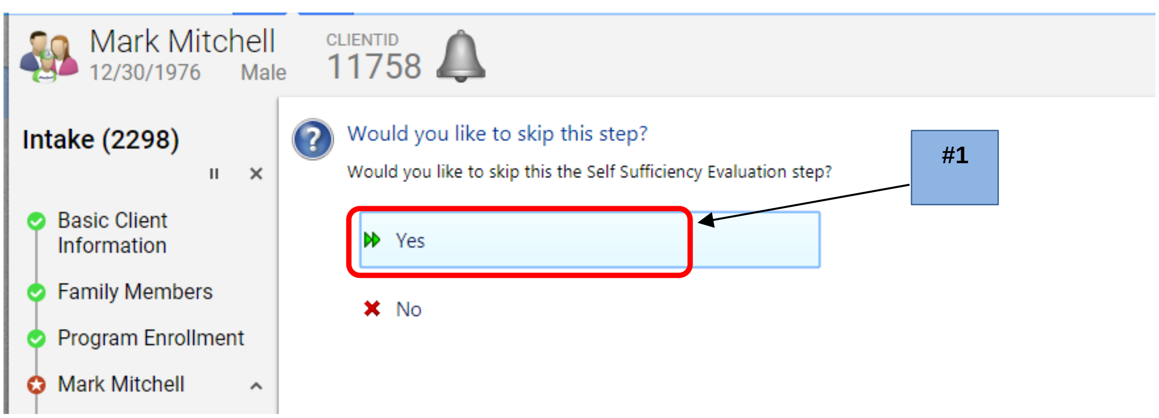
Pay close attention to this screen. It will ask if you want to **SKIP** the step of filling in the Matrix. If you have a Self-Sufficiency Matrix that has been filled out, you want to select NO and proceed to answering the questions.





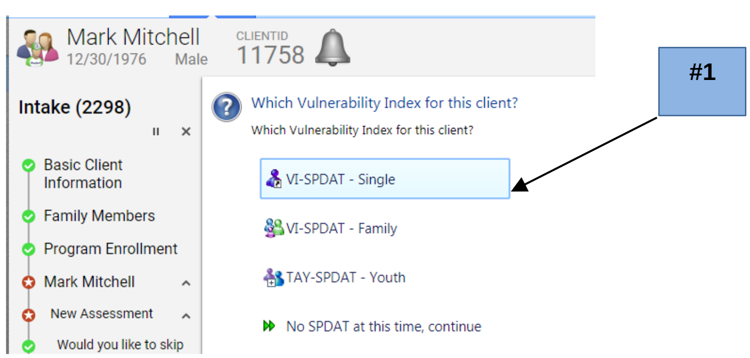
HMIS system will calculate the total automatically.

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

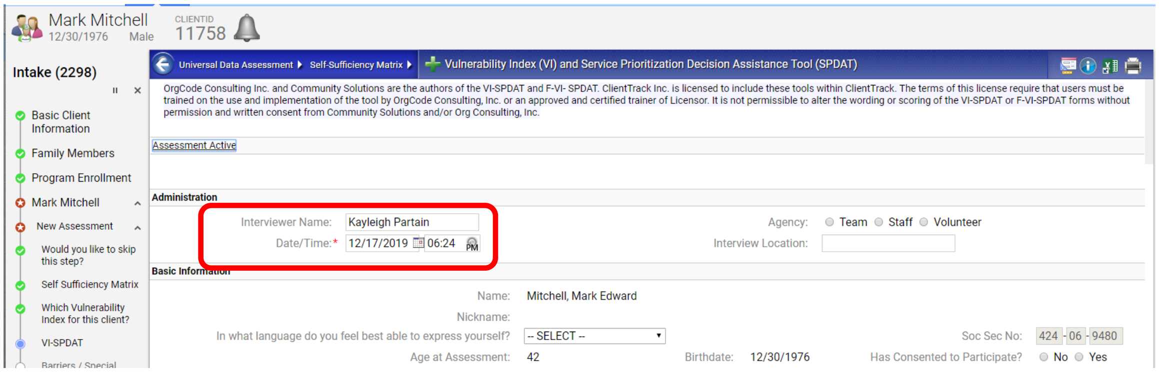


VI SPDAT

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



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.



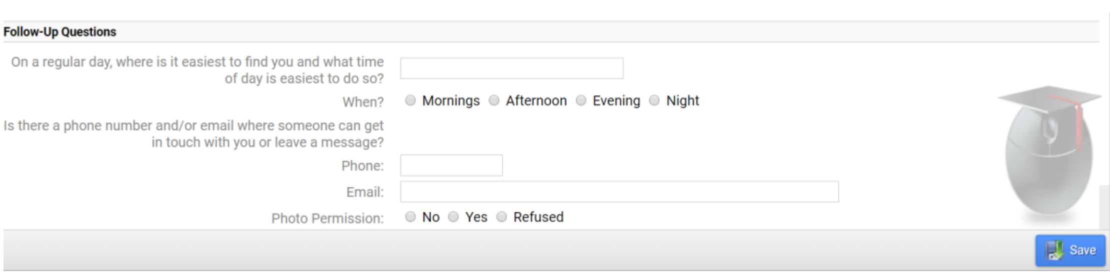
SCORING SECTION

SECTION	SCORE
PRE-SURVEY	0
A. HISTORY OF HOUSING & HOMELESSNESS	0
B. RISK	3
C. SOCIALIZATION & DAILY FUNCTIONS	2
D. WELLNESS	4
Grand Total	9

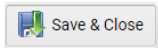
Results

Score	Recomendation
0-3	No housing intervention
4-7	An assessment for Rapid Re-Housing
8+	An assessment for Permanent Supportive Housing/Housing First

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



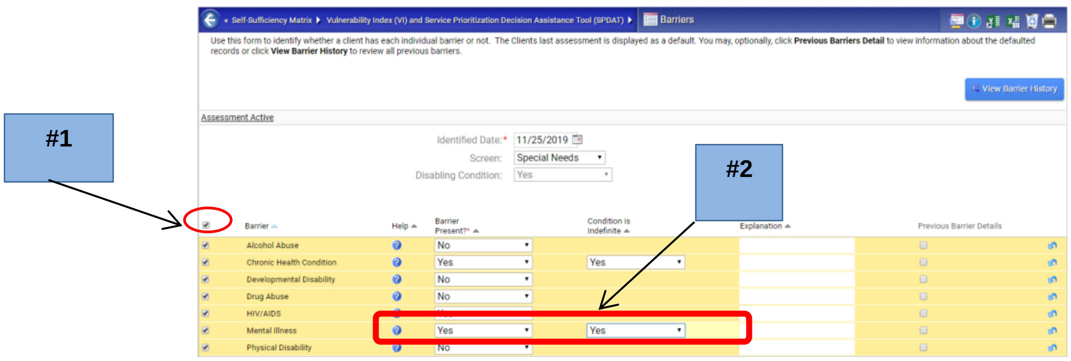
Barriers Assessment

#1. If a client does not have any barriers, click the box on the top left, which marks them all as No, and click 

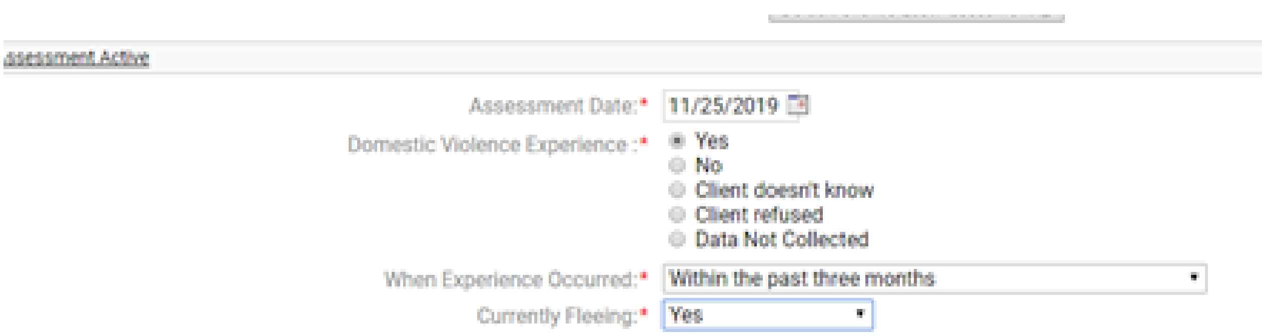
#2. If a client does have barriers, after clicking the box, change the answers on the appropriate barriers

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

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

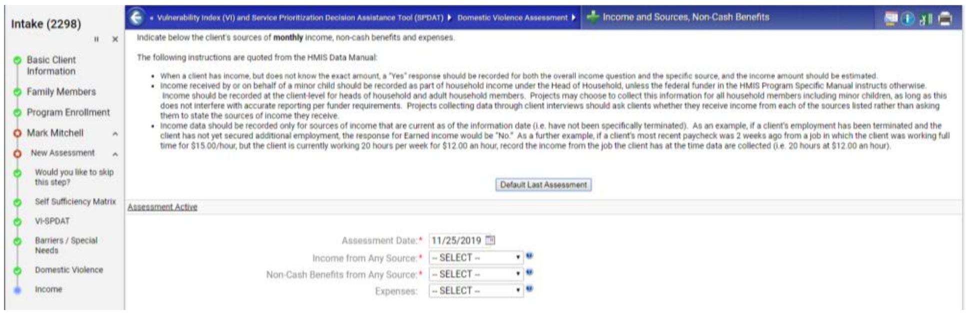


Domestic Violence

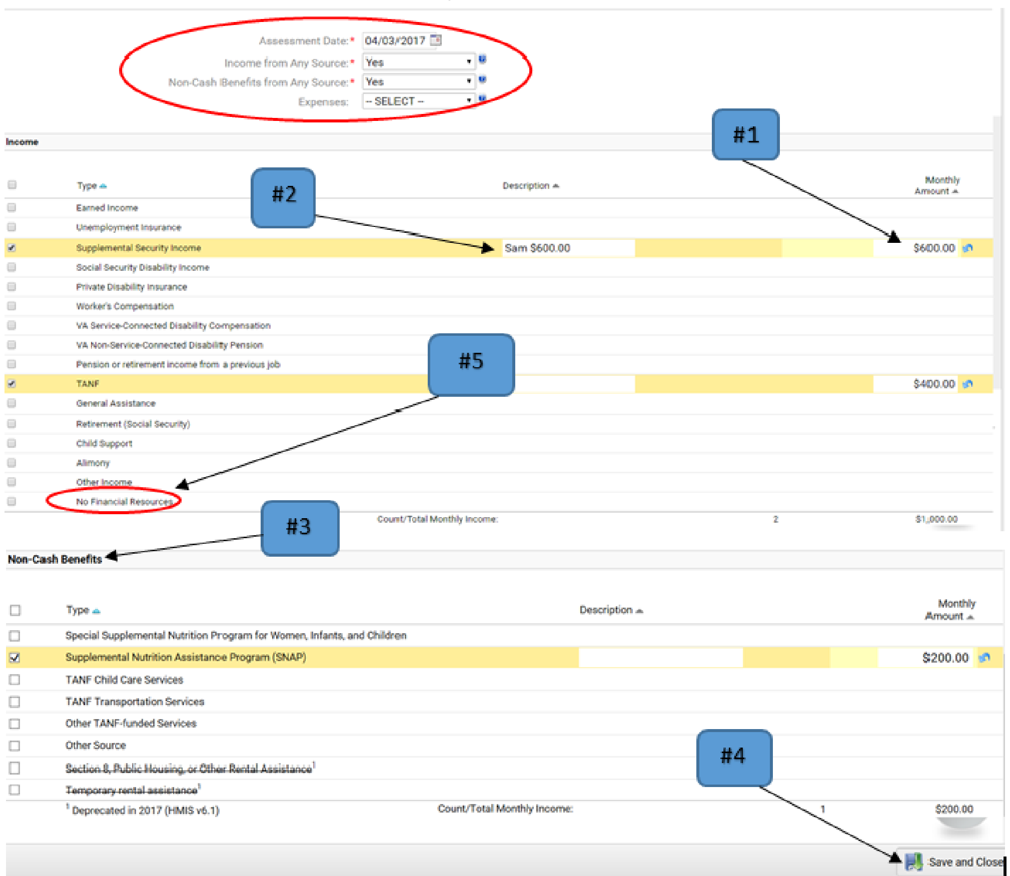


Financial Assessment (Income Sources and Non-Cash Benefits)

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

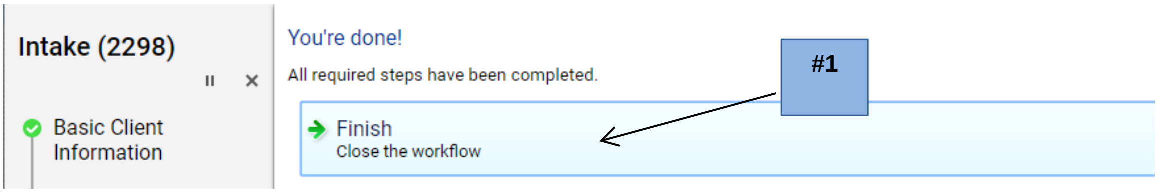


#1. If you mark **Yes**, then select the appropriate income **Type** and enter the amount received rounded to the nearest dollar.
#2. Make a note in the **Description** if the income comes from a child in order to track changes.
#3. Scroll down to the **Non-Cash Benefits**, if you marked **Yes**, and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



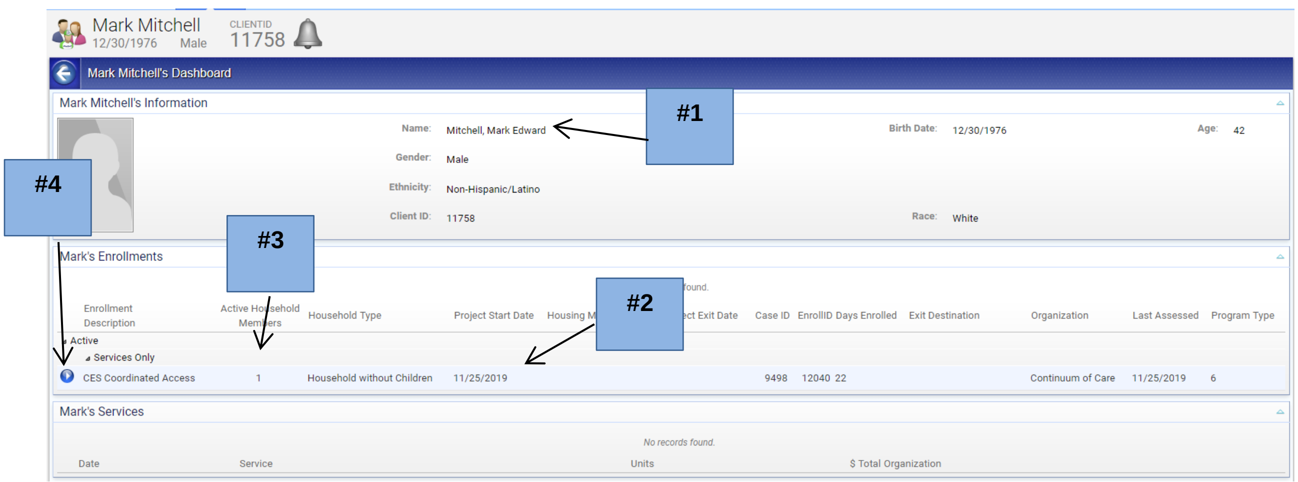
Completing Intake Workflow

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

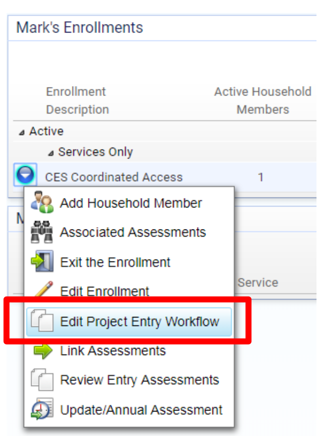


Always double check the Client's Dashboard when you complete the Workflow for accuracy

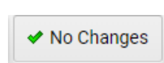
#1. Correct spelling of **Name** and correct **Demographical Information**
#2. Correct **Project Start Date**
#3. Correct number of **Active Household Members**
#4. Correct **Program**

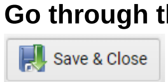


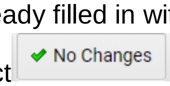
Entering VI-SPDAT or Self-Sufficiency Matrix after HMIS Enrollment is Complete

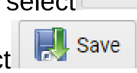


From the **Client Dashboard**, click on the blue action arrow on the **CES Coordinated Access** enrollment and select **Edit Project Entry Workflow**

Go through the entire workflow, marking 

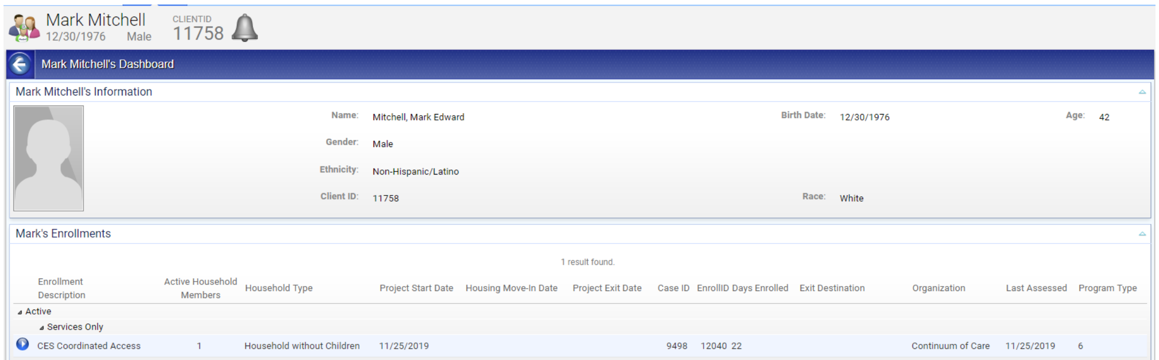
or 

until you come to the **Self-Sufficiency Matrix**. It will ask if you would like to skip the assessment. Click **No**, even if you have already completed it. It will bring up the Matrix already filled in with the answers you chose. If there are no changes, select 

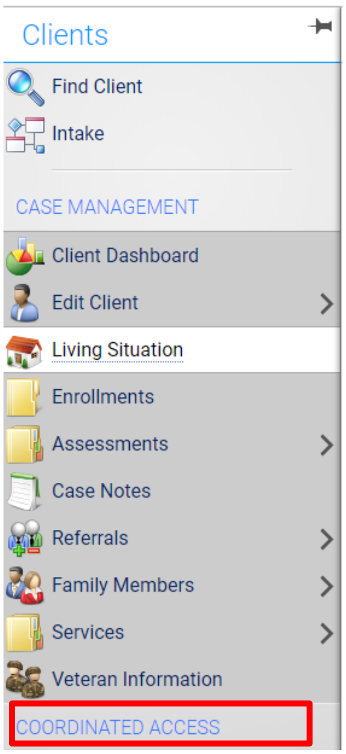
. If there are changes, make those changes and select 

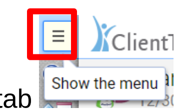
.

Always remember when doing this process, go completely through the entire workflow and through all assessments and end back at the Client Dashboard!



What is Viewable Through the Coordinated Access Enrollment?



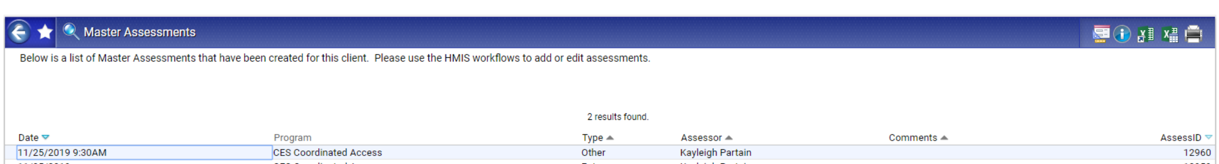


In the Client Workspace, under the **Menu** tab there is a **Navigation Menu** option **Coordinated Access.** You will see this on all clients in HMIS.

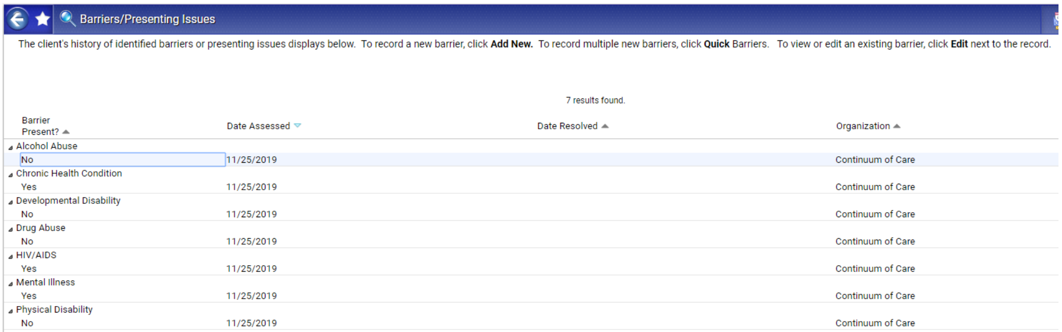
If the client is enrolled in a CES Coordinated Access Project, you will have access to the following data, as shown in the menu when you select **Coordinated Access.**

CE Assessments

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



CE Barriers

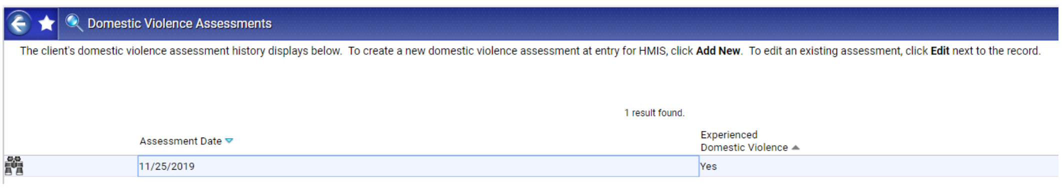

Barriers/Presenting Issues

The client's history of identified barriers or presenting issues displays below. To record a new barrier, click **Add New.** To record multiple new barriers, click **Quick** Barriers. To view or edit an existing barrier, click **Edit** next to the record.

7 results found.

Barrier Present?	Date Assessed	Date Resolved	Organization
Alcohol Abuse			
No	11/25/2019		Continuum of Care
Chronic Health Condition			
Yes	11/25/2019		Continuum of Care
Developmental Disability			
No	11/25/2019		Continuum of Care
Drug Abuse			
No	11/25/2019		Continuum of Care
HIV/AIDS			
Yes	11/25/2019		Continuum of Care
Mental Illness			
Yes	11/25/2019		Continuum of Care
Physical Disability			
No	11/25/2019		Continuum of Care

CE Domestic Violence

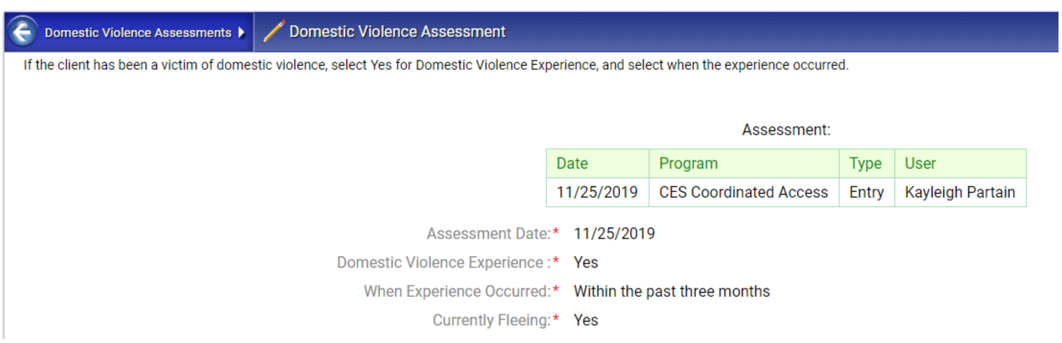

Domestic Violence Assessments

The client's domestic violence assessment history displays below. To create a new domestic violence assessment at entry for HMIS, click **Add New**. To edit an existing assessment, click **Edit** next to the record.

1 result found.

Assessment Date	Experienced Domestic Violence
11/25/2019	Yes

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


Domestic Violence Assessments ▸ Domestic Violence Assessment

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

Assessment:

Date	Program	Type	User
11/25/2019	CES Coordinated Access	Entry	Kayleigh Partain

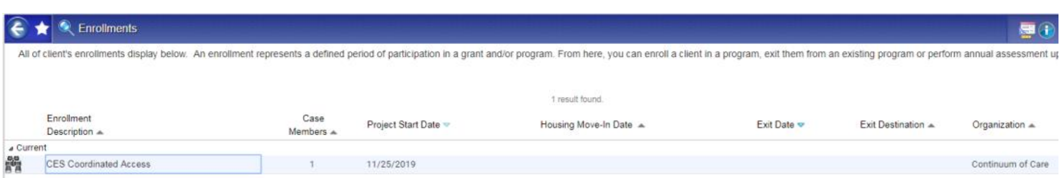
Assessment Date:* 11/25/2019

Domestic Violence Experience :* Yes

When Experience Occurred:* Within the past three months

Currently Fleeing:* Yes

CE Enrollments

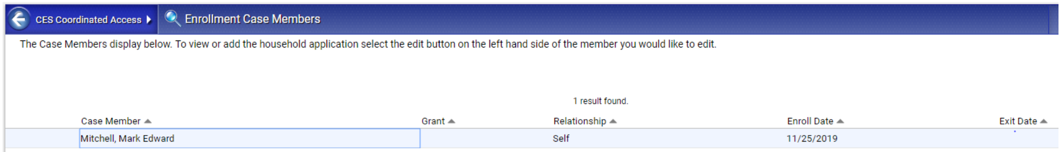

Enrollments

All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a client in a program, exit them from an existing program or perform annual assessment u

1 result found.

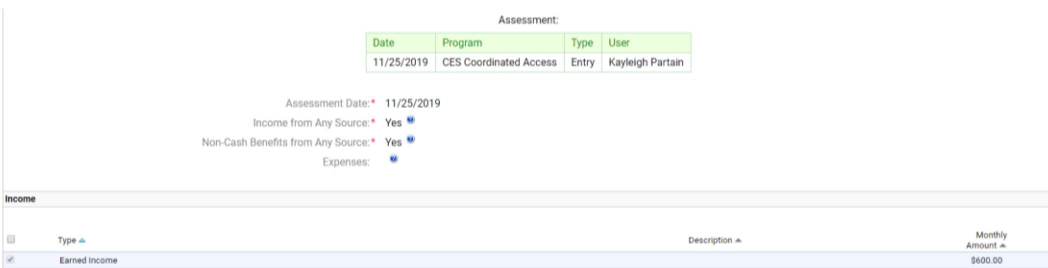
Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization
Current						
CES Coordinated Access	1	11/25/2019				Continuum of Care

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

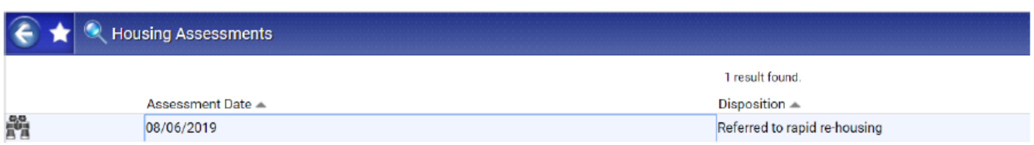


CE Financial Assessment

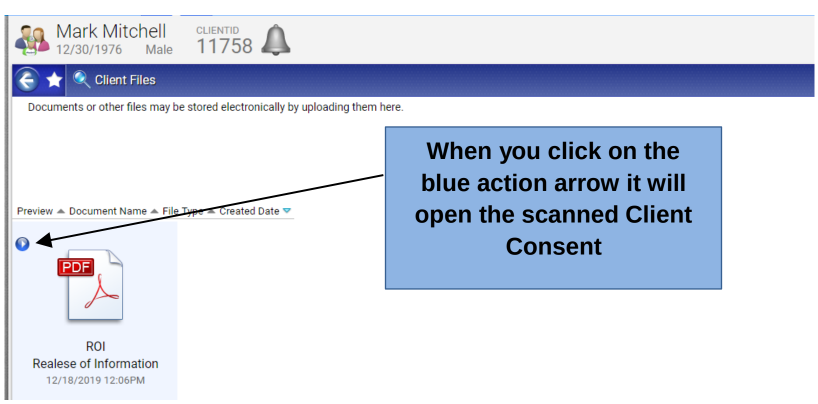
When you click on the binoculars you will view the actual Income Assessment



CE Housing Assessment Disposition at Exit



CE Release of Information



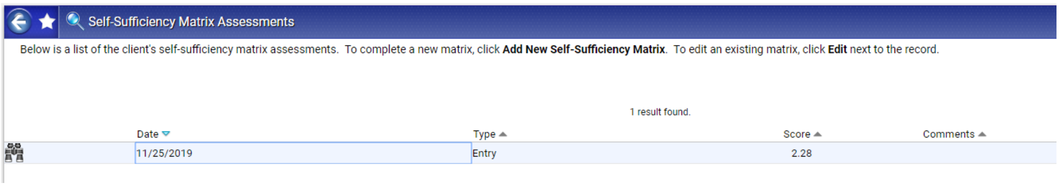
Stanislaus County HMIS
Client Informed Consent and Release of Information

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 low-income people.

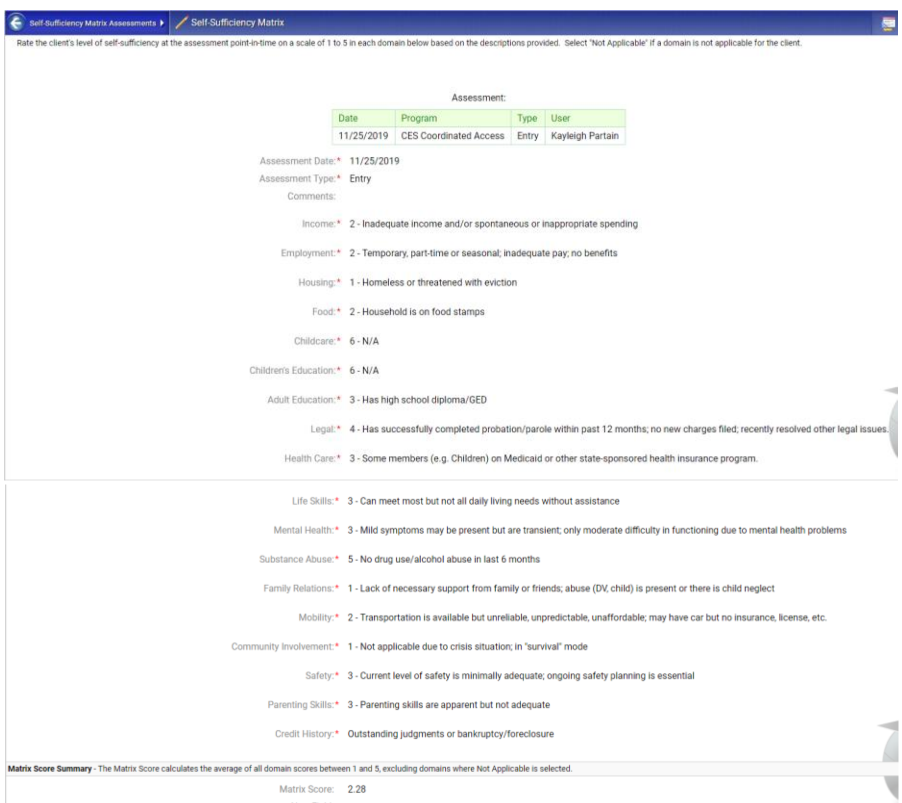
Client information is collected in HMIS and released to housing and homeless service providers (each, a "Partner Agency," and collectively, the "Partner Agencies"), which includes community-based organizations, non-profit organizations and government agencies. Partner Agencies use the information in HMIS: to improve housing and services quality; to identify patterns and monitor trends over time; to conduct needs assessments and prioritize services for certain homeless and low-income subpopulations; to enhance inter-agency coordination; and to monitor and report on the delivery, impact, and quality of housing and services.

Client information is protected by limiting access rights to the database and by limiting the parties to whom the confidential information may be released, in compliance with federal, state, and local regulations governing the confidentiality of client records. Each person or agency with access rights to HMIS, or to whom client information is released, must sign an agreement to maintain the security and confidentiality of client information. Upon any violation of the agreement, access rights may be terminated, and the person or agency found to be in violation of the agreement may be subject to further penalties.

CE Self Sufficiency Matrix

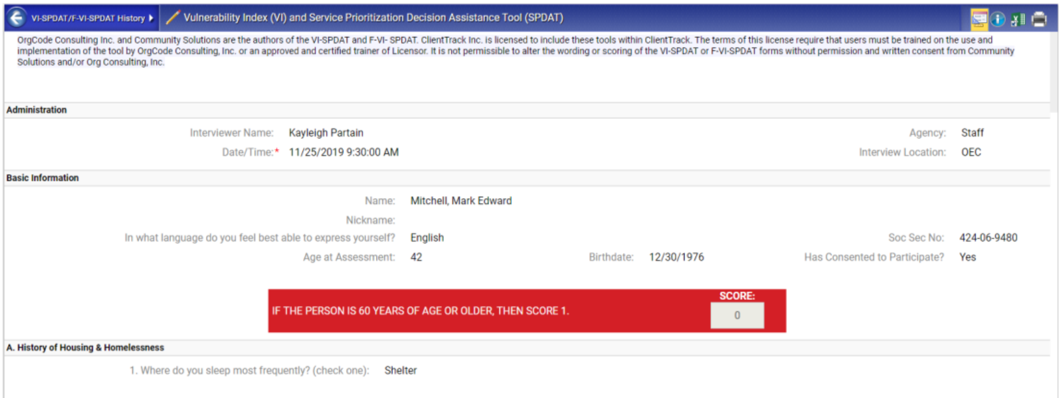


When you click on the binoculars you will view the actual Self-Sufficiency Matrix Assessment

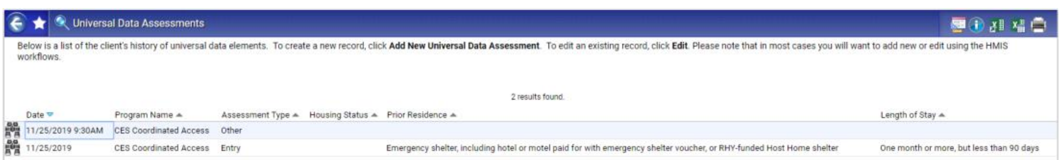


CE VI SPDAT

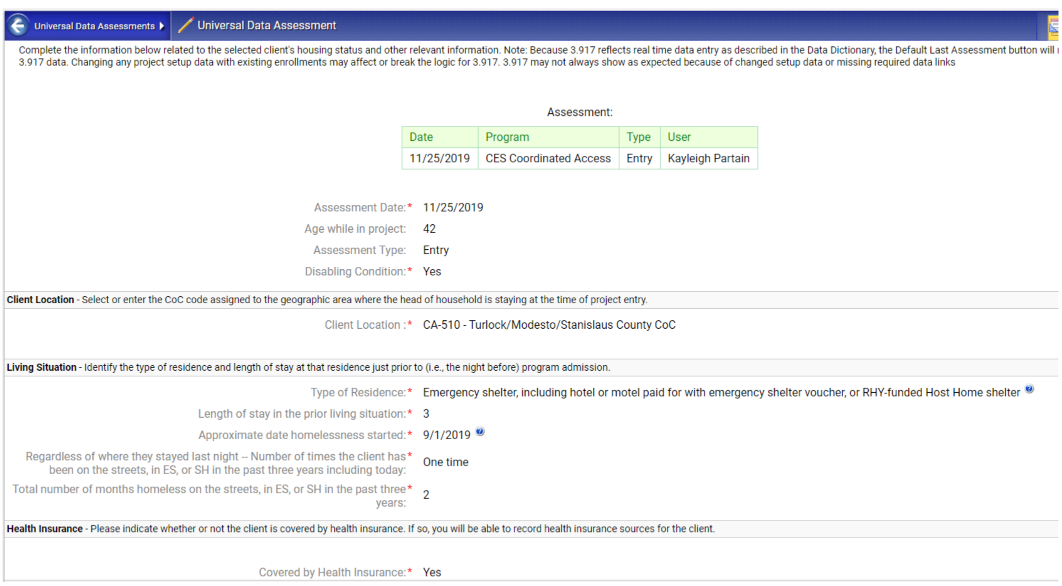
When you click on the binoculars you will view the actual VI SPDAT Assessment



CE Universal Data

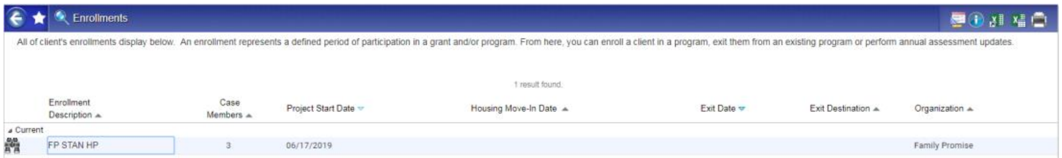


When you click on the binoculars you will view the actual Universal Data Assessment



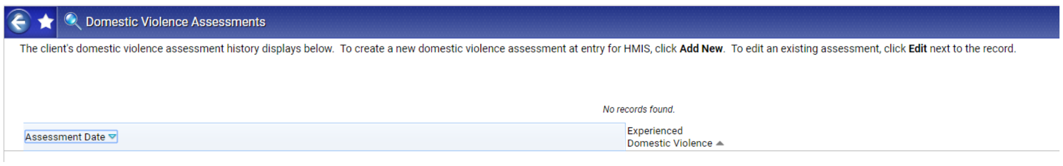
If the client is not enrolled in the CES Coordinated Access Project you will only see the following

Previous Enrollments

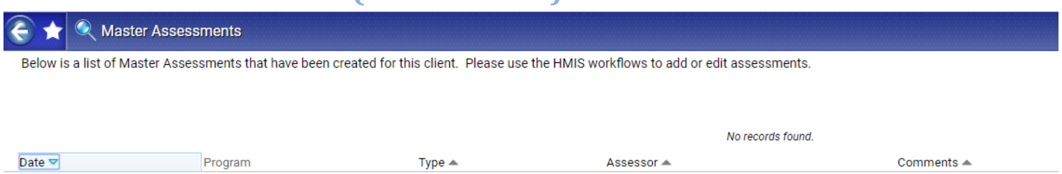


All other CE Assessments will be blank

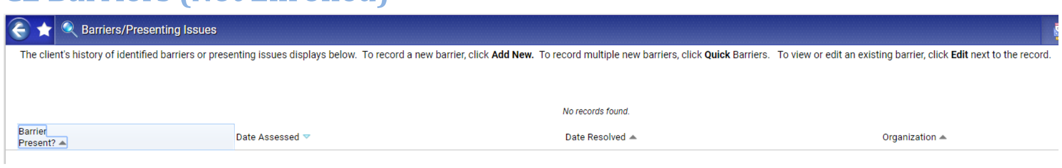
CE Domestic Violence (Not Enrolled)



CE Master Assessments (Not Enrolled)

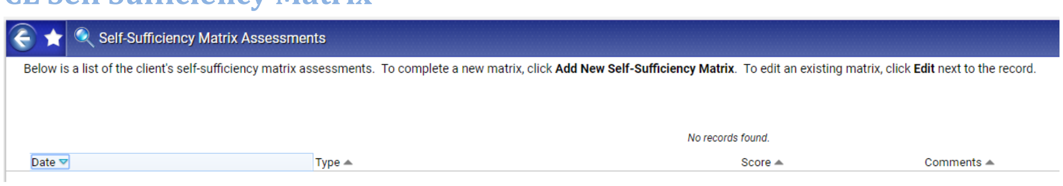


CE Barriers (Not Enrolled)

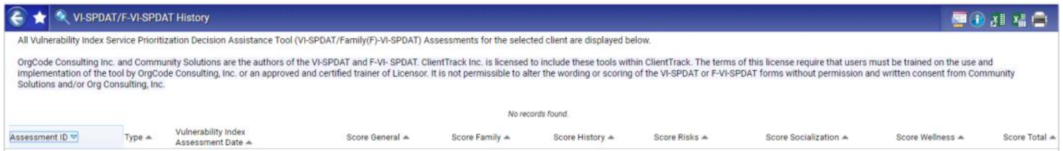


CE Financial

CE Self Sufficiency Matrix



CE VI SPDAT

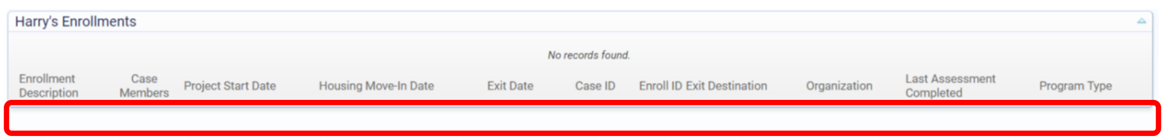


CE Universal Data

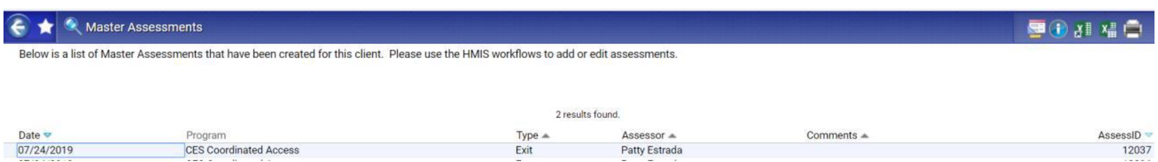
Logged into the Wrong Agency for CES Coordinated Access

Example: Logged in as Organization: **Center for Human Services**

The CES Coordinated Access Enrollment will not be visible on the Client Dashboard

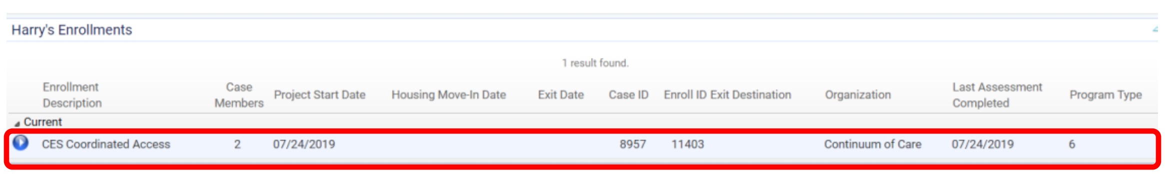


You are still able to view all of the CE Assessments through the Navigation Menu, Coordinated Access Tab

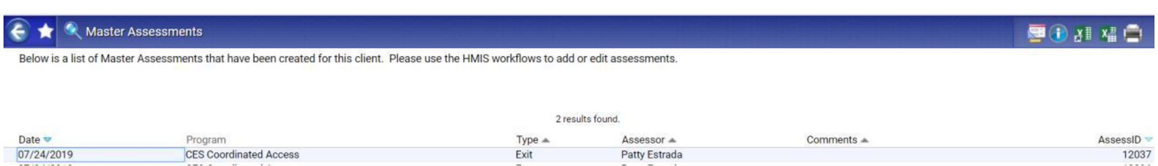


Example: Logged in as Organization: **Continuum of Care**

The CES Coordinated Access Enrollment is visible on the Client Dashboard

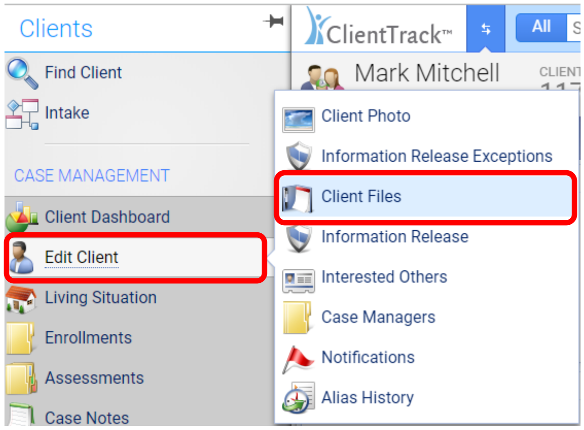


You are able to view CE Assessments as above



How to Scan the Release of Information and VI SPDAT Into HMIS

You must be logged into HMIS under Organization: **Continuum of Care**

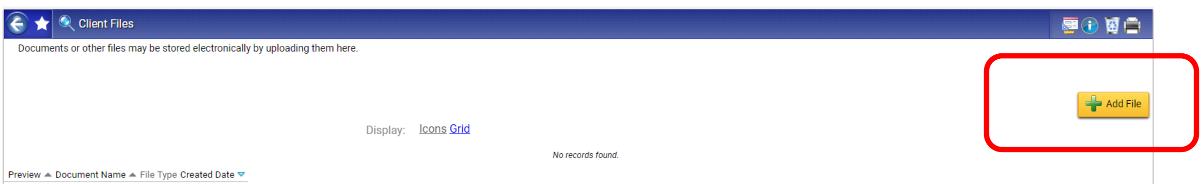


From the **Client Workspace**, open the **Navigation Menu**, select **Case Management**, hover mouse over **Edit Client** which will bring up side menu and select **Client Files** from that menu.

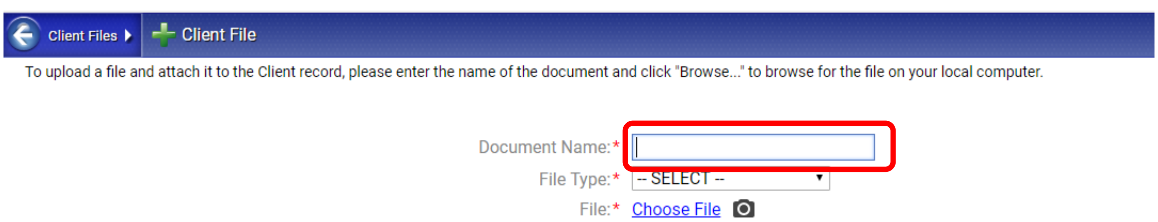
If Family VISPDAT, upload to HOH ONLY

Note: Do NOT click on **Edit Client** as that will take you to the Client Information screen to edit demographic information.

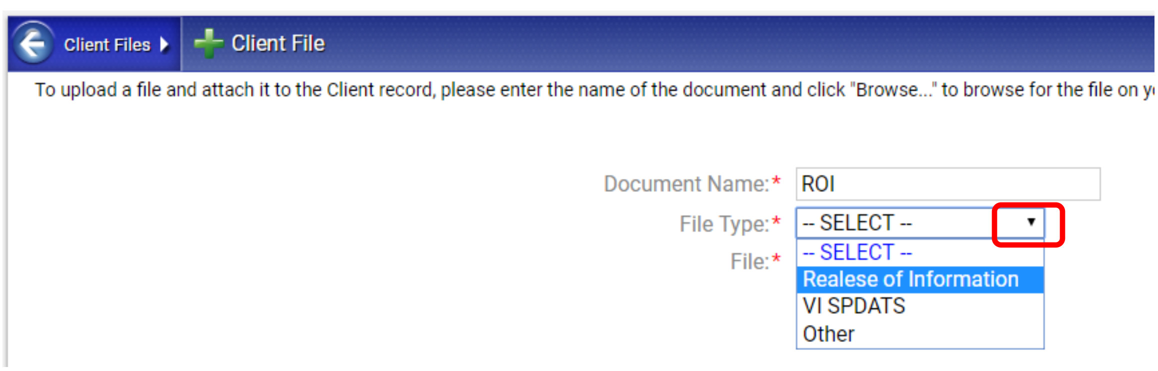
#1 Click **Add New**



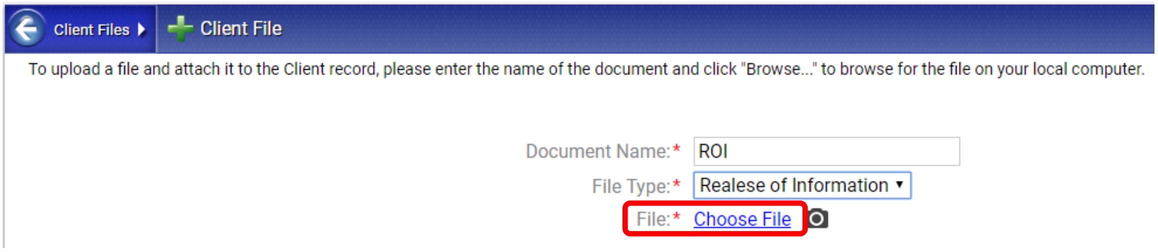
#2 Name Document: **Release of Information (ROI) or VI SPDAT**



#3 Select Appropriate File Type from drop down

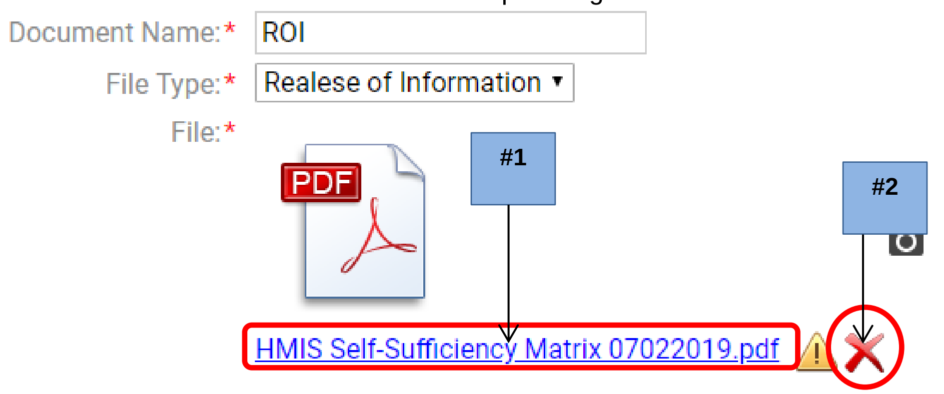


#4 Choose File

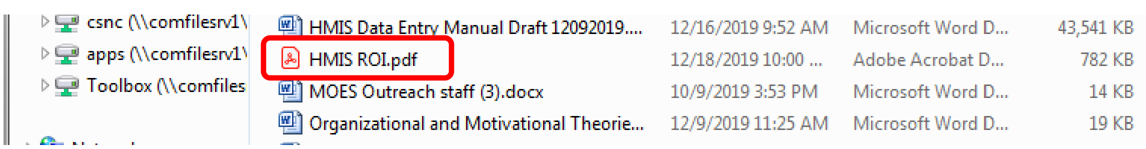


You will have to scan the document and save on your desktop or in a file on your computer but once you have uploaded it, **YOU MUST DELETE the document, DO NOT KEEP it on your computer!**

#1. If you chose the wrong file
#2. Click on the red **X** to remove and upload again



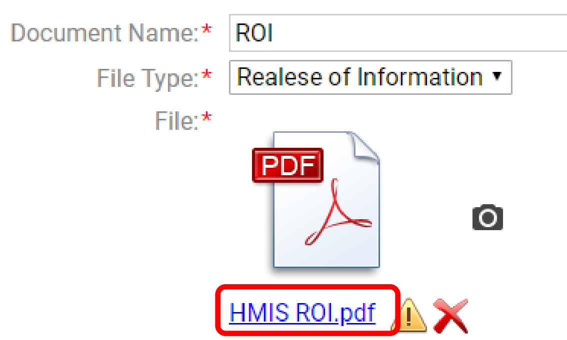
As soon as you click the **X**, your Files will show and you can click on the correct file and hit Open



It will automatically change to the selected document, so **Verify that it shows the correct document**

Make sure to click 

at the **bottom right**.



Once saved, it will show the PDF File