



## HMIS USER MANUAL

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

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## OBJECTIVES

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

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

In this manual you will find the following information:

### CONTACTS

- IHCDA staff list and contact information
- HMIS help desk information

### SECURITY POLICIES & PROCEDURES

- Implied Consent Policy
- Computer storage
- Username and password

### OVERVIEW OF CLIENTTRACK FEATURES

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

### MANAGEMENT OF CLIENT INFORMATION AND PROGRAM ENROLLMENTS

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

### BASIC REPORTS

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

## CONTACTS

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### HMIS HELP DESK

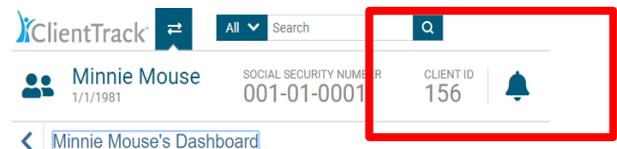
If you encounter any issues with ClientTrack at any time, please contact the help desk with the email address below.

**Please do not send any identifying information for clients**

**when emailing the help desk.** There is a unique client ID

number assigned to each client record in the system. This number is found at the top of the client record to the

right of the client's name and date of birth as seen outlined by the red box. **Please use the client ID number when emailing the help desk if applicable.**



**HMIS Help Desk:** [HMISHelpDesk@ihcda.IN.gov](mailto:HMISHelpDesk@ihcda.IN.gov)

### CLIENTTRACK ACCESS

You can access HMIS with the following link:

<https://www.clienttrack.net/IndianaHMIS>

**HMIS Balance of State ClientTrack**

## SECURITY POLICIES & PROCEDURES

Personal Protected Information (PPI) is considered any information that could lead to individual identification. Agencies participating in HMIS should have procedures in place for the secure storage and disposal of hardcopy and electronic data generated from ClientTrack or created for entry into ClientTrack. PPI should be stored in locked drawers/file cabinets and hardcopy data should be shredded before disposal. Electronic PPI including data contained on disks, CD's, jump drives, computer hard drives, and/or other media should be reformatted before disposal.

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## PRIVACY AND CLIENT INFORMATION RESTRICTIONS

**The Notice of Privacy Practices, including the purpose for data collection, should be posted in a public area and in an office where an intake professional meets with clients.** The full privacy policy notice should be posted on the web sites of agencies, as well as made available to clients who request it. The document is called “HMIS Notice of Privacy Practices” and “HMIS Statement of Privacy Practices” and can be downloaded from the IHCD website at: <https://www.in.gov/ihcda/indianabos/2436.htm>

**A signed client consent form is not currently required.** A client, who presents to your agency for services and provides information, is giving implied consent to enter and share certain data in ClientTrack. Data collection and data sharing are topics that should be discussed with the client at the time of intake. Some program enrollments (and information related to those enrollments) are restricted and only the enrolling organization (HOPWA, PATH, RHY) will have access to those records. ***No person is to be refused services regardless of their participation in ClientTrack.*** You can find Indiana’s Balance of State (BOS) security plan on the website, as well as other helpful forms and resources: <https://www.in.gov/ihcda/indianabos/2436.htm>

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## CLIENTTRACK COMPUTERS

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

***ClientTrack usernames and passwords are NOT be shared with other users.*** Users should not keep username/password information in a public location (i.e., sticky notes on monitors or filed under HMIS or Password in a Rolodex). ClientTrack security policies require the use of strict passwords. Passwords must have:

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

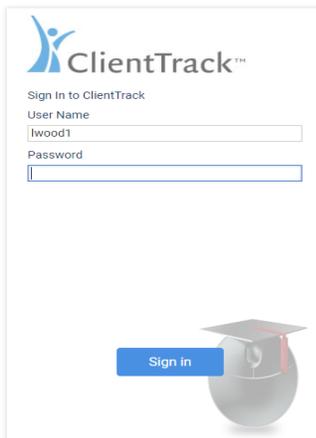
New passwords will be required upon first login. **Accounts are automatically deactivated after 30 days of inactivity for security purposes.** You will be required to change your password every 90 days for security purposes. If you need assistance with your username and password, contact the Help Desk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

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## LOGGING INTO THE SYSTEM

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

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



What's New

**NHSDC Oct 2019**  
9/30/2019

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

**Florida Coalition for the Homeless**  
9/30/2019

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

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

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

Your organization may participate in one or more of the three workgroups called **“2020 HMIS User”, “2020 RHY User”** or **“2020 Coordinated Entry.”** Be sure to select the appropriate workgroup when logging in as it makes a difference for which programs you can manage. Also make sure your organization and location are selected appropriately. Click on **“Use These Settings”** to continue. You will be required to **“Accept”** the Terms of Agreement when you log into the system for the first time.

USER DASHBOARD

You will be directed to your **User Dashboard** on the **“Home”** screen and notified of any important **“HMIS News”**



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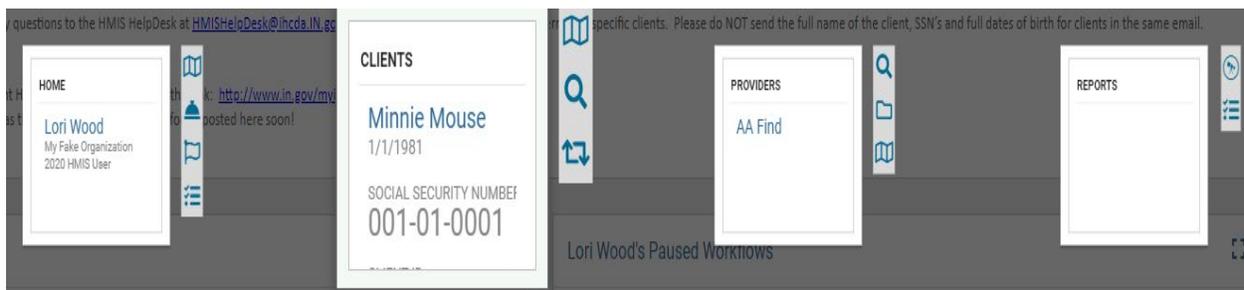
items IHCDA wishes to communicate (i.e. upcoming trainings, changes etc.). This is the first screen you come to after logging into the system.

OVERVIEW OF CLIENTTRACK FEATURES

You can access all four dashboards, **“Home,” “Clients,” “Providers,”** and **“Reports”** which provide different features for managing your cases, by clicking on the link with white arrows beside the ClientTrack logo outlined with the red box below.



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



If you have access to more than one workgroup, you can use the link with your name in the upper right-hand corner of the screen as outlined above to toggle between the workgroups without logging out. The **“Sign Out”** link is in this same location as well. **Please be sure to “Sign Out” any time you leave the database to ensure security of client data.**

On the **“Home”** screen there is also a list of **Menu Items** that give you easy access to your current case assignments, case notes, and more under **“My ClientTrack.”** When you first log into the system, you may want to **“Pin”** the menu on the left side of the screen to leave that tool bar open. In order to **“Pin”** the menu, click on the box with three lines highlighted in red as seen to the right here. Once the Menu is visible, click on the push pin to keep the menu open. This is the same process when using the Client Dashboard.

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

## CLIENT DASHBOARD

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

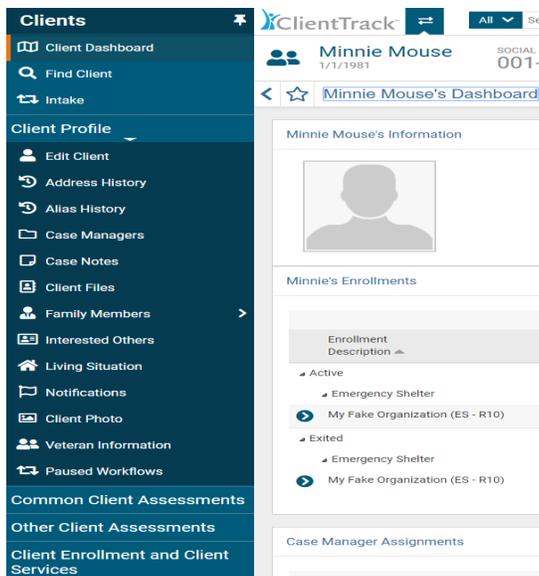
The screenshot displays the Client Dashboard for Minnie Mouse. At the top, the client's name, Social Security Number (001-01-0001), and Client ID (156) are visible. The 'Basic Information' section includes fields for Name, Birth Date, Gender, Ethnicity, Race, and Veteran status. Below this, the 'Program Enrollments' section shows a table with one enrollment record for 'My Fake Organization (ES - R10)'. The 'Case Manager Assignments' section shows a table with one assignment for Autumn Gale.

- At the very top of the client dashboard, you will see the client's **"Basic Information"** and demographics. You can find the **client ID number** at the top of the client record, which is automatically assigned to the record when created.
- In the center of the client dashboard, you will see all the client's past and present **program enrollments**. There is a blue action wheel you can click on to easily manage your program enrollment. When you click on the blue action wheel, a drop-down list will appear where you can use these tools:
  - Add Household Member** – Use this feature if a new household member needs to be added to the household and enrolled after an enrollment has already been established, i.e., a new baby is born and needs to be enrolled with Mom. Make sure you're on the head of household's client record when adding a family member to the enrollment.
  - View Case Members** – View all case members associated with the specific program enrollment.
  - Exit the Enrollment** – To exit a client, select "Exit the Enrollment" and you will be prompted through the exit workflow for the client and all household members if applicable. If you need to only exit one household member, go to the specific household member's client record and conduct the exit workflow without exiting the household.
  - Edit Enrollment** - Use this feature to edit the "Start Date" of the enrollment. You can also add Family Members by clicking on the "Family Member" button. "Exit Enrollment" is also available by clicking on the "Exit Enrollment" button
  - Edit Project Entry Workflow** – Use this feature to edit or identify incorrect or missing information from the client's Project Entry (a check mark appears by each assessment type noting the assessment is complete)
  - Review Entry Assessments** – Use this feature to review and/or make changes to Entry workflow

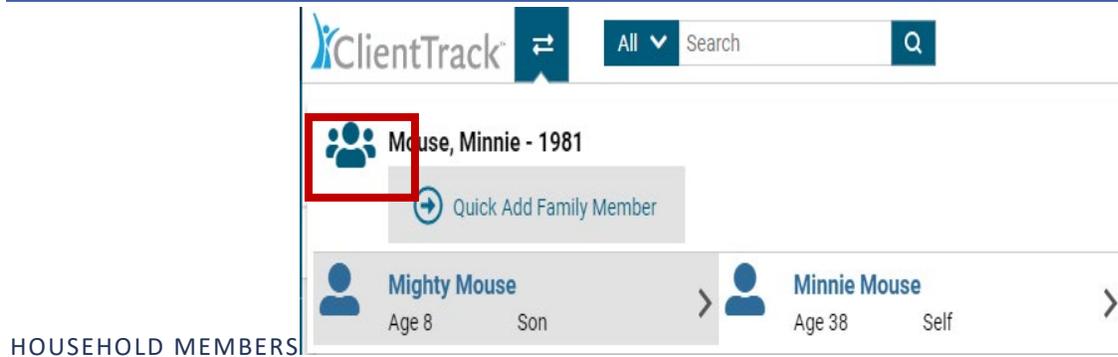
- **Missed Annual/Update Assessment** – Use the Update/Annual Assessment to conduct annual assessments or capture changes to a client’s status since enrollment.
  - **Review Entry/Exit Assessments** – You can review the assessments completed at entry and exit with this feature without going through the workflow. This is helpful in completing missing data that was not captured at those points in time.
3. **Case Manager Assignments** are located below the enrollments section of the client record. You can manage case assignments here by clicking on “[**Client Profile**] **Case Managers** or clicking on the little pencil beside the case manager’s name. Clicking on the **recycle bin** beside a case manager’s name will delete the case manager from the client record. By clicking on the case manager assignments link, you will be taken to a screen where you can edit the status of a case manager for a specific program enrollment or add new case managers to the client record.
4. **Services** associated with a specific program enrollment will be listed at the bottom of the client record. You can manage your client services by clicking on “**Client Enrollment and Client Services**” in the list of case management tools on the left-hand side of the client record or by clicking “[**Client Name**] **Services**” above the list of services on the client record. Documenting services is discussed in detail starting on page 25 of this manual.

## CASE MANAGEMENT TOOLS

- On the **Client Dashboard** you will find a list of Case Management Tools by clicking on “**Client Profile**” on the left-hand side of the client record. The following information outlines features and tools found on the client record, and to access some of these features, you must click on the heading located on the left hand side of the client record to cause another list of tools to appear as seen below:



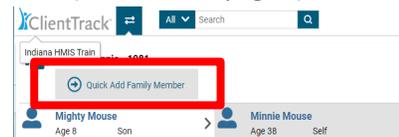
- **Client Dashboard** – The overview of the client record as seen on page (8). Click on this link to return to the client record from any screen.
- **Find Client** – To search for a client in the system by first and last name, date of birth, social security number, client ID number, etc.
- **Intake** – To enroll a client in your program.
- **Client Profile** – Click on this function to access numerous features for Case Management
  - **Edit Client** – To edit basic client information like address, date of birth, social security number, disabling condition, veteran status, etc. There are more helpful tools under “Edit Client” that are available for you to use depending on your agency’s needs and requirements.
- **Case Notes** – To create and review case notes.
- **Family Members** – To review household members.
- **Client Photo** – this feature allows you to upload a photo to the client’s file
- **Veteran Information** – Allows you to collect and enter data about the veteran’s service
- **Paused Workflows** – To resume a workflow you previously paused.



You can view household members and their client records by clicking on the **family icon** at the top of the client record beside the client name. A drop-down window will appear with all the current household members. You can click on the names of the household members in the drop-down window to go directly to his/her client record. You can also use the **“Quick Add Family Member”** link in this window to add new household members. **Please note that you will be able to add household members during an Intake workflow as well.** You may also add a family member to an existing enrollment with the **“Add Household Member”** feature (described on page 8) listed when you click on the blue action wheel beside your program enrollment.

NOTIFICATIONS

ClientTrack features a **“Notifications”** tool on the client record allowing you to set up alerts specific to the client, like reoccurring appointments, required documentation, client deadlines, etc. The Notifications tool is located to the right of the client’s name and client ID number at the very top of the client dashboard. To add a new notification, click on the bell and a new window will appear below it. Select **“Add New”** to add a new notification. A new window will open where you can set up the new notification as seen here.

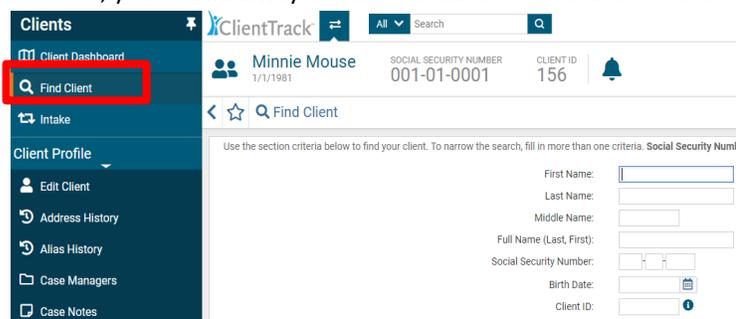


After setting up the notification, you can review your notifications and calendar by clicking on the bell and selecting **“View Notifications.”**

MANAGING CLIENT INFORMATION AND PROGRAM ENROLLMENTS

FINDING A CLIENT IN THE SYSTEM

Before entering a client into the system as a new client, you should always conduct a search for the client to see if there is an existing client record in the system. To search for a client, go to the **“Clients”** dashboard and click on **“Find Client”** in the upper left-hand corner of the screen outlined in red on page 11. **It is imperative you do not enter a duplicate client record into the system in order to ensure the accuracy and overall quality of the data.** To speed the search process and reduce the chance for input error, input as few characters as possible in the criteria fields.



You may search for a client by entering the following:

- Letters of the client first/last name (use as few letters as possible of the first and last name to conduct a thorough search)
- Social Security Number
- Birth Date
- Client ID Number

It is important to try different options for your search. **Again, it is best to ONLY enter the first few letters of the first/last name and not rely solely on a social security number or birth date, as those elements have a higher rate of missing or inaccurate data.** Another option for searching is to search different spellings of the client's name remembering to search for nicknames such as "Joe" in addition to "Joseph" or "Jen" in addition to "Jennifer."

If the client is already in the system, highlight the client name in the search results and click on the **Client Name** to select that record. The selected client's information will be displayed at the top of the screen and all information entered from this point forward while on the client's dashboard will be associated with the currently selected client.



After selecting the client in the search list and going to the client's dashboard, if the client's basic information has changed, click on the **"Edit Client"** link in the list of case management tools found on the left-hand side of the screen outlined in red below to make any necessary changes to the client demographic information (i.e., birth date, ethnicity, name change, etc.). ***\*\*Please note that the "Save" button will save the changes made to the screen and leave you on the same page. The "Save & Close" button will save the changes you have made to the screen and move you to the next one.***

#### ADDING A NEW CLIENT WITH A PROGRAM ENROLLMENT

ClientTrack utilizes a specific workflow to step you through the process of completing all required assessments at entry and discharge. The workflow is easy to use, and it automatically prompts you for the necessary information.

After conducting a search for the client in the system to ensure an existing client record did not already exist, you

*IHCDA works to eliminate duplicate records in ClientTrack. Please contact the HMIS Help Desk by emailing [HMISHelpDesk@ihcda.IN.gov](mailto:HMISHelpDesk@ihcda.IN.gov) with clients who have multiple records in the system. When sending a notification of duplicates or any information regarding clients to the Help Desk, please ONLY send Client ID numbers. Client ID numbers are found at the top of the record to the right of the client name and date of birth.*

can add a new client record by selecting **"Intake"** in the upper left-hand corner of the screen found under **"Find Client."** Then choose **"Add New Client"** when prompted as seen below.

The screenshot shows the ClientTrack interface. On the left, the 'Intake' option is highlighted in red. The main area displays the 'Intake (2298)' form for 'Minnie Mouse' (DOB: 1/1/1981, SSN: 001-01-0001, Client ID: 156). A modal dialog is open with the question 'Do you want to add a new client or use the selected client?'. The 'Add a new client' button is highlighted with a red box and a red arrow points to it.

Enter your client's first and last name and click **"Next."** If a duplicate client already exists and was not identified during the client search the first time, **a warning in red letters** will be displayed. It is very important to review the displayed list. If the client is already in the system, click the client's name to select the existing client record. If the client you are entering is a new client, do not select a client in the displayed list, click **"Next"** to proceed with the intake process.

Add the client's basic information including date of birth, social security number, demographics, disabling condition, Veteran status and address. Click **"Finish"** when the client's basic information is complete.

The screenshot shows the 'Basic Client Information' form for 'Minnie Mouse'. The form is divided into sections: 'Basic Client Information', 'Basic Client Demographics', and 'Contact Information'. The 'Basic Client Information' section includes fields for First Name, Last Name, Middle Name, Suffix, Name Quality (with a dropdown menu), Social Security Number, and SSN Quality (with radio button options: Client doesn't know, Client Refused, Data not collected). The 'Basic Client Demographics' section includes Birth Date, Client Age (with radio button options: Full DOB Reported, Approximate or Partial DOB Reported), Date of Birth Quality (with radio button options: Client doesn't know, Client refused, Data not collected), Ethnicity (with a dropdown menu), Race (with a dropdown menu), Gender (with a dropdown menu), and Veteran Status (with a dropdown menu). The 'Contact Information' section includes Address and Address 2 fields.

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

#### Definitions of Basic Client Information Requirements

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

- **Social Security Number (SSN)** – If the client doesn't know or refuses to provide their SSN, **DO NOT under any circumstance enter a fake social security number** such as 123-45-6789 or 999-99-9999. Select the data quality option that best reflects the client's response. Please note that "Data not collected" means that the question was not asked of the client and will report as missing on the APR. If the client doesn't know, the best selection is "Client doesn't know."
- **Birth Date** – Month, day and year the client was born. Again, do not make up a birth date. Choose the appropriate data quality option that best reflects the client's response.
- **Ethnicity** – Hispanic/Latino origin includes individuals of Cuban, Mexican, Puerto Rican, South or Central American origin.
- **Race** – A person can identify with multiple races and this is a multi-select box that allows for multiple races to be checked at once. Click on all that apply.
- **Gender** – Select the gender with which the client identifies. If the client reports "**Female**," you will be prompted for the client's "**Pregnancy Status**" and "**Due Date**" if applicable.
- **Disabling Condition** – Select the appropriate response as reported by the client. *Please note that if the client reports at least one barrier on the Barriers Assessment, then the disabling condition status should be "Yes."* You can update the disabling condition by clicking on the "**Edit Client**" link.
- **Veteran Status** – Select the appropriate response as reported by the client. If you select "Yes" for Veteran Status here, you will be prompted in the workflow to complete the Veterans Assessment.
- **Address** – Add the address where the client currently resides (emergency shelter, etc.). If the client enters emergency shelter, you should use their previous address.
- **Family** – Do NOT enter anything in the "Family" field. ClientTrack will create a household/family account automatically.
- **Relationship to Head of Household** – When entering the first client in the household, the system will default to "Self." It is imperative this information is entered correctly for ALL household members. Otherwise, your reports will not accurately reflect the clients and household make-up.

## ADDING HOUSEHOLD MEMBERS

Next you will be prompted to add additional household members to include for the program enrollment or services. To add household members, click on the empty box and complete the row of information (name, birth date, etc.) for the new household member(s). You can tab through the fields to complete the required information and add any number of household members at this time by repeating these steps.

The screenshot shows the ClientTrack interface for a client named 'Another Client'. The 'Family Members' section is active, displaying a table with one row of data. A red arrow points to the 'Add' button (a plus sign) in the table header.

First Name	Middle Name	Last Name	Suffix	Name Quality	Birth Date	Age	Birth Date Quality	Gender	SSN	SSN Quality
✓ Another		Client		Full name reported	02/02/1989	30	Full DOB Reported	Male	131-31-3131	

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

appears in the new window to attach the existing client record to the household. If the household member is a new client, click on **“Cancel”** in the search window and proceed entering the new household’s information in the required data fields.

Click **“Save & Close”** when finished adding household members.

## PROGRAM ENROLLMENT

Programs vary in their data requirements and ClientTrack will prompt you through the workflow to collect all of the required HUD data elements for your specific program. Please note that all fields with an **asterisk \*** are required data fields and you will not be able to proceed in the workflow until all of the required information is completed.

Select your **“Program”** with the drop down box and then select which household members to enroll by clicking on the empty box beside the client(s) name. If a check mark appears by a client name on the program enrollment screen (as seen below), the client will be enrolled in your program. You can de-select a client by clicking on the check mark beside his/her name again to remove the check mark and ensure the client is not enrolled.

**Remember to change the Enrollment Date if you are back dating the information. To ensure accurate data quality, enter all client data in a timely manner. “Date of Move In” is only prompted for clients enrolling in ESG or SSVF Rapid Re-Housing programs. If you don’t find your program option when enrolling a client, cancel the workflow by clicking the black “X” in the workflow screen found in the upper left-hand corner and please notify IHCDA immediately by emailing [HMISHelpDesk@ihcda.IN.gov](mailto:HMISHelpDesk@ihcda.IN.gov) . Program information must be set up in the system before you can begin to enroll clients.**

## HMIS UNIVERSAL DATA ASSESSMENT FOR INTAKE WORKFLOW

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

### Definitions of Universal Data Assessment Requirements

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

contact the HMIS Help Desk where you will be assisted.

- **Assessor** – Case manager completing the assessment and who will automatically be assigned to all case members.
- **Program** – Displays the name of the Program in which client is enrolled
- **Disabling Condition** – Enter the client's answer (Yes, No, Client Doesn't Know, Client Refused, Data Not Collected)
- **Client Location** – Defaulted information that is set up with your program in the system. If this information is missing when completing an assessment, please contact the HMIS Help Desk.
- **Prior Living Situation** – Identify where the client was staying on **the night before** the client is enrolled in your program. The built-in logic will prompt you for more data depending on the selection made for this question. Those additional data elements are the following:
  - **Length of stay in prior living situation**
  - **Approximate date homelessness started**
  - **Regardless of where they stayed last night – Number of times the client has been on the streets, in ES, or SH in the past three years including today**
  - **Total number of months homeless on the street, in ES, or SH in the past three years** - Data in this section is used along with disabling condition to determine whether a client is chronically homeless. *HUD strongly encourages HMIS users to just ask the client for the information and record the client's answer. Attempting to tie each individual response with definitions or documentation requirement is not the attempt of this question.*
- **Health Insurance Assessment** – Complete the required information pertaining to the client's insurance status. If a client's health insurance entry status has changed, change the status of the type of insurance to "No" and then add an end date. Then you can change the Health Insurance status to "No" and click "Save" to continue.

## VETERAN ASSESSMENT FOR INTAKE WORKFLOW

The Veteran Assessment will only be included in the workflow if you select **“Yes”** for the **“Veteran Status”** on the basic information screen of the client (as seen on page 13).

ClientTrack  
Melon  
SOCIAL SECURITY NUMBER: 321-32-3211  
CLIENT ID: 3327

Branch and Discharge Status

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

Branch of the Military: Army  
Discharge Status: Honorable

Military Service Dates

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

Service Entry Date: 11/16/2015  
Service Exit Date: 11/12/2019

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

If the Veteran Status is **“No,”** then the Veteran Assessment will not be collected in your program enrollment. Please be sure to review the Veteran Status with the client and select the appropriate response on the **“Basic Client Information”** screen of the intake workflow or **“Edit Client”** screen on the client record.

On the Veteran Assessment, select all **“Theatre(s) of Operation(s)”** to move forward in the workflow. To indicate which operation the client served in, change the **“Status”** of the specific operation to **“Yes”** with the drop down in that row. You can select more than one operation of service by changing the status to

**“Yes”** for each one. To complete the Veteran Assessment, click **“Save.”**

## HMIS Barriers Assessment for Intake Workflow

To select a barrier, click on the drop-down box for **“Barrier Present”** and change the status to **“Yes.”** The system defaults **“No”** for all barriers. Complete any required fields that appear after selecting that specific barrier. Please note that the date identified is the program enrollment date – the date the client presents to you and qualifies for entry in the program. It is important to keep in mind that clients must have at least one barrier to be eligible for some programs (such as Permanent Supportive Housing)

ClientTrack  
Another Client  
SOCIAL SECURITY NUMBER: 131-31-3131  
CLIENT ID: 3325

Intake (2298) Barriers

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

Assessment Active  
Identified Date: 11/21/2019  
Screen: HMIS Barriers  
Disabling Condition: Yes

Barrier	Barrier Present	Condition is Indefinite	Explanation	Restriction	Previous Barrier Details
Alcohol Abuse	- SELECT -			Restrict to Organization	
Developmental Disability	- SELECT -			Restrict to Organization	
Drug Abuse	- SELECT -			Restrict to Organization	
HIV/AIDS	- SELECT -			Restrict to Organization	
Mental Health	- SELECT -			Restrict to Organization	
Physical Disability	- SELECT -			Restrict to Organization	
Chronic Health Condition	- SELECT -			Restrict to Organization	

If **no barriers** are present at enrollment, select all barriers and leave the **“Barrier Present”** status as **“No”** and click **“Save & Close.”**

## Domestic Violence (DV) Assessment for Intake Workflow

The screenshot shows the 'Domestic Violence Assessment' form. On the left is a navigation pane with steps: Basic Client Information, Family Members, Program Enrollment, Another Client, New Assessment, Barriers / Special Needs, Domestic Violence (selected), and Income. The main content area has a header: 'If the client has been a victim of domestic violence, select Yes for Domestic Violence Experience, and select when the experience occurred.' Below this is a 'Default Client's Last Assessment' button. The form includes the following fields:

- Assessment Active** (checkbox)
- Assessment Date:** 11/21/2019 (calendar icon)
- Domestic Violence Experience:** Radio buttons for Yes, No, Client doesn't know, Client refused, Data Not Collected.
- Restriction:** Radio buttons for Restrict to Organization, Restrict to MOU/InfoRelease (selected).

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

## FINANCIAL ASSESSMENT FOR INTAKE WORKFLOW

Complete the status for **“Income from Any Source”** and **“Non-Cash Benefits from Any Source”** with the provided drop down lists. If the status for either of these financial sources is **“Yes,”** you will be prompted to provide more information on the **“Type”** (definitions below) of income/benefit and the **amount (monthly amount)** with the list that appears below the status after selecting **“Yes.”** Please note that Non-Cash Benefits will appear below Income and you will need to scroll down to input that information. **Also input any income a child may receive (i.e., SSDI) on the head of household’s income/benefits information. You will not complete a Financial Assessment for children in the household.**

The screenshot shows the 'Income and Sources, Non-Cash Benefits' form. On the left is a navigation pane with steps: Basic Client Information, Family Members, Program Enrollment, Another Client, New Assessment, Barriers / Special Needs, Domestic Violence, and Income (selected). The main content area has a header: 'Indicate below the client's sources of monthly income, non-cash benefits and expenses.' Below this is a 'Default Last Assessment' button. The form includes the following fields:

- Assessment Active** (checkbox)
- Assessment Date:** 11/21/2019 (calendar icon)
- Income from Any Source:** Yes (dropdown menu)
- Non-Cash Benefits from Any Source:** Yes (dropdown menu)
- Expenses:** - SELECT - (dropdown menu)

Intake (2298) + Income and Sources, Non-Cash Benefits

Income

<input type="checkbox"/>	Type ▲	Description ▲	Monthly Amount ▲	Restriction ? ▲
<input type="checkbox"/>	Earned Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Self Employment	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Worker's Compensation	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Unemployment Insurance	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Pension	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Supplemental Security Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Social Security Disability Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Retirement (Social Security)	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Veteran's Pension	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Veteran's Disability Payment	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	TANF	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Child Support	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
Count/Total Monthly Income:			0	\$0.00

### Definitions of Sources of Income

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

Non-Cash Benefits

Type ▲	Description ▲	Monthly Amount ▲	Restriction ⓘ ▲
<input type="checkbox"/>	Food Stamps/Money for food on benefits card	<input type="text"/>	Restrict to MOU/infoRelease ▼
<input type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children	<input type="text"/>	Restrict to MOU/infoRelease ▼
<input type="checkbox"/>	TANF Child Care Services	<input type="text"/>	Restrict to MOU/infoRelease ▼
<input type="checkbox"/>	TANF Transportation Services	<input type="text"/>	Restrict to MOU/infoRelease ▼
<input type="checkbox"/>	Other TANF-funded Services	<input type="text"/>	Restrict to MOU/infoRelease ▼
<input type="checkbox"/>	Other Source	<input type="text"/>	Restrict to MOU/infoRelease ▼
1 Depreciated in 2017 (HMIS v6.1)		Count/Total Monthly Income:	0 \$0.00

Restriction:  Restrict to Organization ⓘ  Restrict to MOU/infoRelease

### Definitions of Non-Cash Benefits

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

### HMIS UNIVERSAL DATA ASSESSMENT FOR CHILD AT INTAKE

Complete the required data elements for the child on the HMIS Universal Data Assessment. You will notice that the child’s assessment does not require as much information as the adult’s assessment. Click **“Save”** when finished with the assessment to continue in the workflow.

ClientTrack | All Search | Lori Wood (Training) | Help | Sign Out

Little Client 2/2/2012 | SOCIAL SECURITY NUMBER 225-28-2525 | CLIENT ID 3326

**+ Universal Data Assessment**

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

Note:

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

Default Client's Last Assessment ⓘ

Assessment Date: 11/21/2019 ⓘ  
 Age at Assessment: 7  
 Assessment Type: Entry ▼  
 Assessor: Lori Wood ⓘ  
 Program: My Fake Organization (ES - R10) ▼  
 Disabling Condition: - SELECT - ▼

Health Insurance

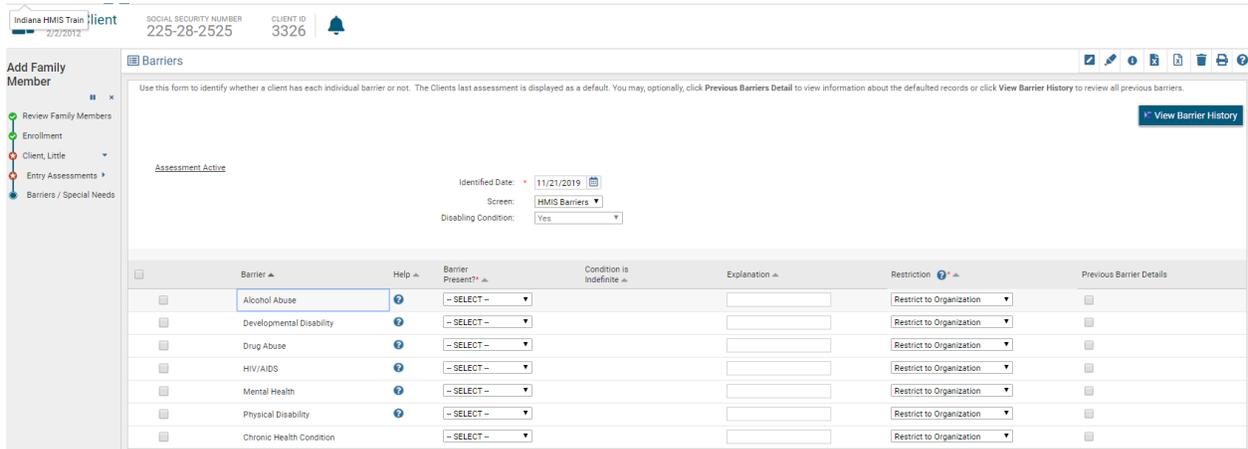
Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Covered by Health Insurance: - SELECT - ▼ Default Last Insurance Status ⓘ

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

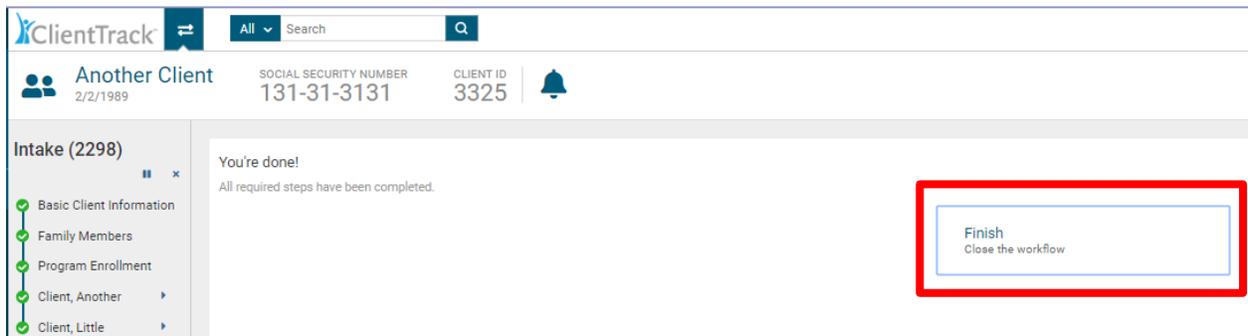
### HMIS BARRIERS ASSESSMENT FOR CHILD AT INTAKE

Complete any barrier information for the child you are enrolling. If **no barriers** are present at enrollment, select all the barriers and leave the **“Barriers Present”** status as **“No”** and click **“Save & Close.”**



### COMPLETING THE INTAKE WORKFLOW

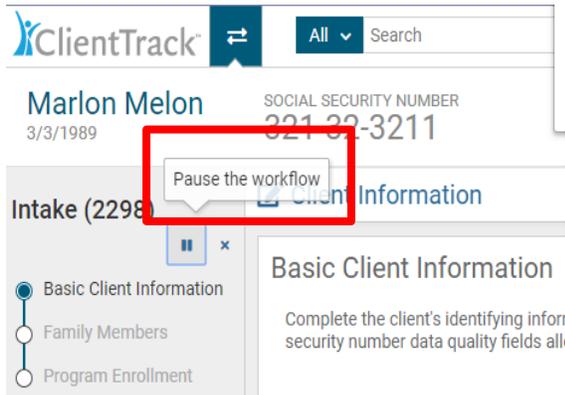
Once you have completed the required entry assessments for your client and household members, you will be prompted to **“Finish”** the workflow. If the workflow is complete, then click **“Finish.”** You will then be directed back to the head of household’s client dashboard and you can see the new program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



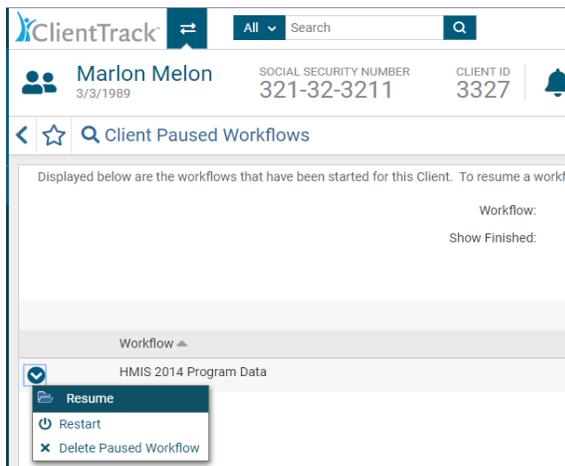
If you need to go back and change information entered in the workflow prior to finishing, you can click on the specific section of the workflow you wish to return to in the workflow window that appears on the left-hand side of the client record (outlined in red above). Clicking on the link beside the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

## PAUSING A WORKFLOW

You may also **“Pause”** a workflow by clicking on the pause button located in the upper right-hand corner of the workflow window beside the black **“X”** (as seen on page 21 in the red box with the red arrow). The black **“X”** will cancel the workflow. The pause feature will allow you to pause the workflow at any time so you can return to it later.



To **resume a paused workflow**, click on **“Paused Workflows”** at the bottom of the list **Client Profile** choices located on the left-hand side of the client record. Then click on the blue action wheel beside your paused workflow to select **“Resume”** in the drop down. This will take you back to where you paused the workflow and you can finish the assessments for the program enrollment.



## UNIQUE PROGRAM REQUIREMENTS AT ENTRY

There are variations in data requirements for different program enrollments. In the following section are descriptions of their unique requirements during the Intake workflow for the following programs:

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

### 1. SUPPORTIVE SERVICES FOR VETERAN FAMILIES (SSVF) ENROLLMENT AT INTAKE

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

**+ HUD Program Enrollment**

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

The Project Start Date is:

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

Project: \* My Fake Organization SSVF RRH (VA=R10)

**Household**

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

Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household	Housing Move-in Date
<input checked="" type="checkbox"/> Melon, Marlon	Male	30	11/21/2019	Lori Wood	Self	11/21/2019

Restriction: \*  Restrict to Organization  Restrict to MOU/infoRelease

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

**+ Universal Data Assessment**

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

Note:

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

Default Client's Last Assessment ⓘ

Assessment Date: \* 11/21/2019

Age at Assessment: 30

Assessment Type: \* Entry

Assessor: \* Lori Wood

Program: My Fake Organization SSVF RRH (VA=R10)

Disabling Condition: \* Yes

Household Income as a Percentage of AMI: \* Less than 30%

VAMC Station Number: \* (583) Indianapolis, IN

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


SOCIAL SECURITY NUMBER  
321-32-3211
CLIENT ID  
3327


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**Intake (2298)** + Veteran Information

**Branch and Discharge Status**

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

Branch of the Military: \*

Discharge Status: \*

---

**Military Service Dates**

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

Service Entry Date: \*  
Service Exit Date: \*  

Please Select Theatre(s) of Operation(s) ▲	Status* ▲
<input type="checkbox"/> Theatre of Operations: World War II	- SELECT - ▼
<input type="checkbox"/> Theatre of Operations: Vietnam War	- SELECT - ▼
<input type="checkbox"/> Theatre of Operations: Persian Gulf War (Operation Desert Storm)	- SELECT - ▼
<input type="checkbox"/> Theatre of Operations: Afghanistan (Operation Enduring Freedom)	- SELECT - ▼
<input type="checkbox"/> Theatre of Operations: Iraq (Operation Iraqi Freedom)	- SELECT - ▼
<input type="checkbox"/> Theatre of Operations: Iraq (Operation New Dawn)	- SELECT - ▼
<input type="checkbox"/> Theatre of Operations: Other Peace-keeping Operations or Military Interventions (such as Lebanon, Panama, Somalia, Bosnia, Kosovo)	- SELECT - ▼
<input type="checkbox"/> Theatre of Operations: Korean War	- SELECT - ▼

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

**+ SSVF Homelessness Prevention**

Assessment Active

Assessment Date: \*  

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

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

Criminal record for arson, drug dealing or manufacture, or felony offense against persons or property: \*  Yes  No

Registered sex offender: \*  Yes  No

At least one dependent child under age 6: \*  Yes  No

Single parent with minor child(ren): \*  Yes  No

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

Any Veteran in household served in Iraq or Afghanistan: \*  Yes  No

Female Veteran: \*  Yes  No

HP applicant total points: 0

Grantee targeting threshold score:

Restriction:  Restrict to Organization  Restrict to MOU/InfoRelease

## 2. PROGRAMS FOR ASSISTANCE IN TRANSITION FROM HOMELESSNESS (PATH) ENROLLMENT AT INTAKE

To manage your PATH program and clients in ClientTrack, be sure to log into the “2020 HMIS” workgroup. In addition to the entry assessments outlined earlier in this manual, the PATH project enrollment will require you to document:

- **Date of Engagement** - Date of Engagement is defined as the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan.
- **Date PATH Status Determined** – Date client’s enrollment in PATH is determined.
- **Client Became Enrolled in PATH** - A PATH enrollment occurs at the point when a client has formally consented to participate in services provided by the PATH project. This does not mean the time at which the client formally consents to services by a community mental health center.
- **Reason Not Enrolled in PATH** – Complete this data field if client is not enrolled in PATH.

+ HUD Program Enrollment

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

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

Project: \* My Fake Organization SSO (PATH-R10)

Household

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

Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household *	Date of Engagement	Date PATH Status Determined	Client became enrolled in PATH	Reason not enrolled in PATH
Friday, Happy	Female	30	<input type="text"/>	<input type="text"/>	--SELECT--	<input type="text"/>	<input type="text"/>	--SELECT--	

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

+ SOAR Connection

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

Default Client's Last Assessment ⓘ

Assessment Active

Assessment Date: \* 11/21/2019 [calendar icon]

Connection with SOAR: \* Yes [dropdown]

Restriction: \*  Restrict to Organization ⓘ  Restrict to MOU/InfoRelease

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

Happy Friday 3/3/1989 SOCIAL SECURITY NUMBER 222-55-4444 CLIENT ID 3329 [bell icon]

Intake (2298) + Current Living Situation [edit icon] [info icon] [print icon] [share icon]

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

Information Date: \* 11/22/2019 [calendar icon] ←

Enrollment: \* 11/22/2019 - My Fake Organization SSO (PATH-R10) [dropdown]

**Current Living Situation Information**

Current Living Situation: \* Place not meant for habitation ←

Location Detail: Beneath the 10th Street Bridge over Big Creek

Record Contact:

**Contact Service Information**

Contact Service: \* PATH - Contact ←

Location: My Fake Organization [dropdown]

Use Geolocation:

Comments: [text area]

Restriction: \*  Restrict to Organization ⓘ  Restrict to MOU/InfoRelease

[Save] >> Skip

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

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

**Assistance Assessment**

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

Assessment Active

Assessment Date: 11/22/2019

Medical Assistance Type	Status	Reason No (if applicable)	Restriction
Receiving Public HIV/AIDS Medical Assistance	-- SELECT --		Restrict to MOU/InfoRelease
Receiving AIDS Drug Assistance Program (ADAP)	-- SELECT --		Restrict to MOU/InfoRelease

**T-cell/Viral Measurements**

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

Assessment Active

Assessment Date: 11/22/2019

T-cell (CD4) Count Available: Yes

Viral Load Available: Available

Date	Measurement	Value	How was the data obtained	Restriction
11/22/2019	Viral Load	0	Client Report	Restrict to MOU/InfoRelease
11/22/2019	T-cell Count	0	Client Report	Restrict to MOU/InfoRelease

Restriction: Restrict to Organization (selected), Restrict to MOU/InfoRelease

Use the drop-down box to change the status of each field to **“Yes”** if the data is reported. After **“Yes”** is selected for **T-cell (CD4) Count Available** or **Viral Load Available**, additional fields will populate in the blue table below where the specific counts can be entered.

**Client Profile**

- Basic Client Information
- Family Members
- Program Enrollment
- Happy Friday
- Family Information
- Financial Evaluation

**Family Financial Evaluation**

Below is a list of all financial income assessments that belong to clients that are current members of the family. Select the desired income assessments to include in the Family Financial Evaluation.

Evaluation Date: 12/04/2019

Date	Type	Monthly Income	Annualized
Friday, Happy			
Do not use any of this client's assessments.			
<input type="radio"/> 12/4/2019	Entry	\$0.00	\$0.00
<input type="radio"/> 11/22/2019	Exit	\$0.00	\$0.00
<input type="radio"/> 11/22/2019	Exit	\$0.00	\$0.00
<input type="radio"/> 11/22/2019	Entry	\$0.00	\$0.00
<input type="radio"/> 11/22/2019	Entry	\$0.00	\$0.00
Total:		\$0.00	\$0.00

Area: Hendricks County, IN  
 Family Size: 1  
 Percentage of Area Median Income: Area median income data isn't configured for this location.  
 Percentage of Federal Poverty Level: 0.00 %  
 Restriction:  Restrict to Organization  Restrict to MOU/InfoRelease

**Complete the Family Financial Evaluation**

**4. RUNAWAY & HOMELESS YOUTH (RHY) ENROLLMENT AT INTAKE**

HUD requires additional data collection for the Runaway & Homeless Youth (RHY) program in HMIS. There is a separate workgroup called “2020 RHY” to manage the RHY program and client information. Be sure to log in appropriately when working with RHY clients.

You will also complete the following assessments:

- Basic Care Program (BCP) Enrollment Status Assessment (see above)
- Employment Assessment
- Health Assessment
- Commercial Sexual Exploitation and Commercial Labor Exploitation Assessment
- Critical Issue(s) Assessment
- Formerly Ward of Assessment

**Rhy Enrollment**

SOCIAL SECURITY NUMBER: 111-88-7788 | CLIENT ID: 3330

**RHY BCP Status Assessment**

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

**RHY - BCP - Status**

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

Date Status Determined: 11/22/2019  
 Youth Eligible for RHY Services: Yes  
 Runaway Youth: Yes

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

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

 **HMIS 2017 Employment Assessment**

Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week employed, indicate if the client is looking for work.

Assessment Active

Assessment Date: \* 11/22/2019 

Employed? \* No ▼

Why Not Employed: \* Not looking for work ▼

Restriction:  Restrict to Organization   Restrict to MOU/InfoRelease

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

 **Child Education Assessment**

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

**Default Client's Last Assessment** 

Assessment Active

Assessment Date: \* 11/22/2019 

Highest Grade Completed: \* 10th Grade ▼

School Status: \* Dropped out ▼

Comments:

Restriction:  Restrict to Organization   Restrict to MOU/InfoRelease

**+ Health Assessment**

Select the appropriate general health status. If the client is female, you will need to select the appropriate pregnancy status. If the client is male, you will need to select the appropriate sexual orientation.

**Default Client's Last Assessment** ⓘ

Assessment Active

Assessment Date: \* 11/22/2019

General Health Status: \* Good ▼

Dental Health Status: \* Poor ▼

Mental Health Status: \* Good ▼

Restriction: \*  Restrict to Organization ⓘ  Restrict to MOU/InfoRelease

**Health Assessment**

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

**RHY Entry Assessment** – The RHY entry assessment is used to collect project entry data for RHY funded projects. Complete the required data and click **“Save”** to continue.

**+ RHY Entry Assessment**

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

Assessment Active

Assessment Date: \* 11/22/2019

Sexual Orientation: \* -- SELECT -- ▼

Referral Source: \* -- SELECT -- ▼

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

Restriction: \*  Restrict to Organization ⓘ  Restrict to MOU/InfoRelease

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

**+ System Use**

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

Assessment Active

Assessment Date\* 11/22/2019

<input type="checkbox"/>	System ▲	Formerly a Ward Of* ▲	Number of Years ▲	Number of Months (1-11) ▲
<input checked="" type="checkbox"/>	Child Welfare/Foster Care Agency	Yes	-- SELECT --	
<input checked="" type="checkbox"/>	Juvenile Justice System	Yes	-- SELECT --	

## ADDING SERVICES

After completing an enrollment for a client, you can document services associated with the program enrollment with the **“Client Enrollment and Client Services”** link located in the list of case management tools on the left-hand side of the client record. To add a service, click **“Services”** and this will open the Services window where you can **“Add New”** services or manage current services. To document a new service, click on **“Add New.”**

The screenshot shows the ClientTrack interface for a client named 'Happy Friday' (DOB: 3/3/1989, SSN: 222-55-4444, Client ID: 3329). The left-hand navigation menu is visible, with 'Client Enrollment and Client Services' highlighted in red. The main content area shows the 'Client Services' window with a table of services. The 'Add New Service' button is highlighted in red.

Date ▼	Service ▲	Units ▲	\$ Total ▲	Organization ▲
Today (1 Services)				
11/22/2019	PATH - Contact	1.00	\$0.00	My Fake Organization
		1.00	\$0.00	

You will see the Services home screen where you select the enrollment associated with the service and the service provided. You can also enter units (1.00 unit = one hour of case management or a bus pass) to track costs. The comments section can be used for reminders; however, this is not a space for writing case notes. Case Notes will be covered later in the manual. Please note that services can be tailored to your organization’s needs. If a service does not appear in your agency’s options, contact the help desk to request that it be added.

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

## QUICK SERVICES

When you need to add more than one service and the services were provided on the same date, you can use the **“Quick Services”** feature to document all the services at the same time. The **“Quick Services”** button is located beside the **“Add New”** button on the Services home screen.

Use the **Service Screen** list to filter services available. You may also filter services available by **Grant** and/or **Provider**. Select the services the client has received and verify the **Units** and **Unit Values**.

Service Screen:

Date:

Grant:

Provider Name:

Enrollment:

User Performing the Service(s):

Location:

4 results found.

Service	Unit Type	Units	Unit Value	Total	Help	Restriction
Case Management (0)						
Case/Care Management	Count	1.00	\$0.00	\$0.00		Restrict to MOU/infoRelease
Utilities (0)						
Utility - Electric	Dollars	1.00	\$1.00	\$1.00		Restrict to MOU/infoRelease
Utility - Gas	Dollars	1.00	\$1.00	\$1.00		Restrict to MOU/infoRelease
Utility Assistance	Count	1.00	\$0.00	\$0.00		Restrict to MOU/infoRelease
		0.00	\$0.00	\$0.00		

[Save](#)

With this feature you can add multiple services to a client record at one time by selecting the **“Grant”** and **“Enrollment.”** Then check the services rendered with the **“Check Box”** next to the service you provided. If you need services added to the list of options, contact the HMIS Help Desk and a technician can customize that information for your agency.

Once you are finished adding multiple services click on the **“Save & Close”** button and you will return to the Services home screen where you can view and manage all services.

## CASE NOTES

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

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

Date	Reporting	User	Organization	Print
No records found.				

[+ Add New Case Note](#) [Print Selected](#)

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

Service*	Enrollment*	Units Of Measure*	Unit Value*	Units*	Total	Staying on Streets, ES or SH*	Restriction
<input checked="" type="checkbox"/> CSP - Gas Card	11/22/2019 - My Fake Organization SSO (PATH-R10)	Count	\$25.00	1.00	\$25.00		Restrict
<input type="checkbox"/> - SELECT -	-- SELECT --	-- SELECT --			\$0.00		-- SELEC

Restriction:  Restrict to Organization  Restrict to MOU/InfoRelease

**You can also document a service simultaneously while documenting a case note (see below).** Just select the enrollment from the drop-down box and add the service associated with the case note. Templates can also be set up for housing plans or any other specific required documentation so it can easily be drafted as a case note. Notify the help desk with any template requests.

Once a case note is created, it will appear in a list of case notes on the Case Notes home screen. You can use the blue action wheel beside the case note to:

- View Case Note
- Edit Case Note
- Delete Case Note

You can also select case notes to print by clicking on the **“Print”** box located in the far column and clicking on the **“Print Selected”** button beside the **“Add New”** button. This will print all the **“checked”** case notes.

## UPDATE/ANNUAL ASSESSMENT

For clients who spend longer periods of time in your program or to document any changes in your client's status since entry, you can conduct an **"Update/Annual Assessment"** formerly known as the During Program Enrollment Assessment. This assessment is required if clients are enrolled in your program for a year or longer, and some programs like SSVF require more frequent assessments so be sure to check your program requirements for the Update/Annual Assessment.

The Update/Annual Assessment is also helpful for tracking significant changes to a household – for example a client gets a job and the income changes, a client receives his/her GED, etc. For your convenience, the assessment has been developed as a workflow with the following steps:

- Click on the **blue action wheel** beside your program enrollment;
- Select **"Update/Annual Assessment"** from the drop-down list; and
- Complete the required assessments prompted by the workflow and **save as you go**.

The screenshot displays the ClientTrack interface for a client named Dilly Dally. The left sidebar contains navigation options such as 'Client Dashboard', 'Find Client', 'Intake', 'Client Profile', and 'Common Client Assessments'. The main content area shows 'Dilly Dally's Information' with fields for Name, Gender, and Ethnicity. Below this is 'Dilly's Enrollments' table. A dropdown menu is open over the first enrollment row, with 'Update/Annual Assessment' highlighted in a red box.

Enrollment Description	Case Members	Project Start Date	Housing M
Active			
PH - Permanent Supportive Housing (disability required for entry)			
My Fake Organization PH (CoC-R10)	2	01/07/2016	01/07/2016

**Client Profile**  
 Dilly Dally  
 1/1/1989  
 SOCIAL SECURITY NUMBER: 222-22-5444  
 CLIENT ID: 354

**HUD Program Enrollment**

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

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

Project: My Fake Organization PH (CoC-R10)

**Household**

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

Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household	Housing Move-in Date
<input checked="" type="checkbox"/> Dally, Dilly	Female	30	01/07/2016	Lori Wood	Self	01/07/2016
<input checked="" type="checkbox"/> Dally, Billy	Male	8	01/07/2016	Lori Wood	Son	

Restriction:  
 Restrict to Organization  
 Restrict to MOU/InfoRelease

**Save**  No Changes

When the Update/Annual Assessment workflow is prompted, you will review case members and click **“Save”** or **“No Changes”**.

**Client Profile**  
 Dilly Dally  
 1/1/1989  
 SOCIAL SECURITY NUMBER: 222-22-5444  
 CLIENT ID: 354

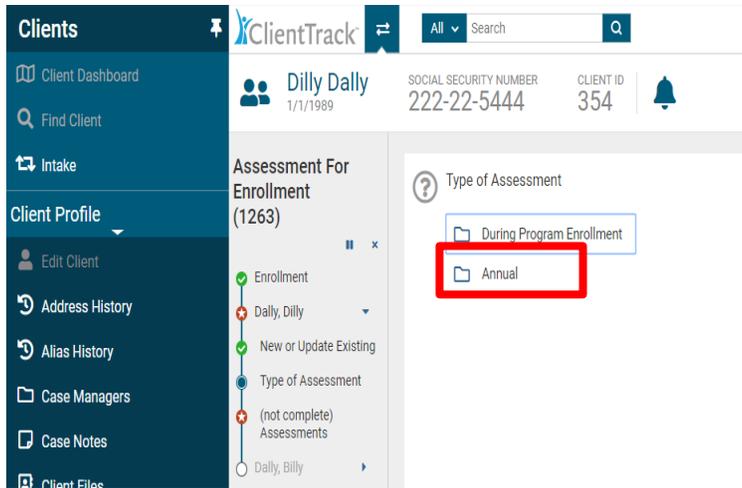
**Assessment For Enrollment (1263)**

- Enrollment
- Dally, Dilly
- New or Update Existing**
- Dally, Billy

**New or Update Existing**  
 for this Client are you

- New Assessment**
- Update Existing

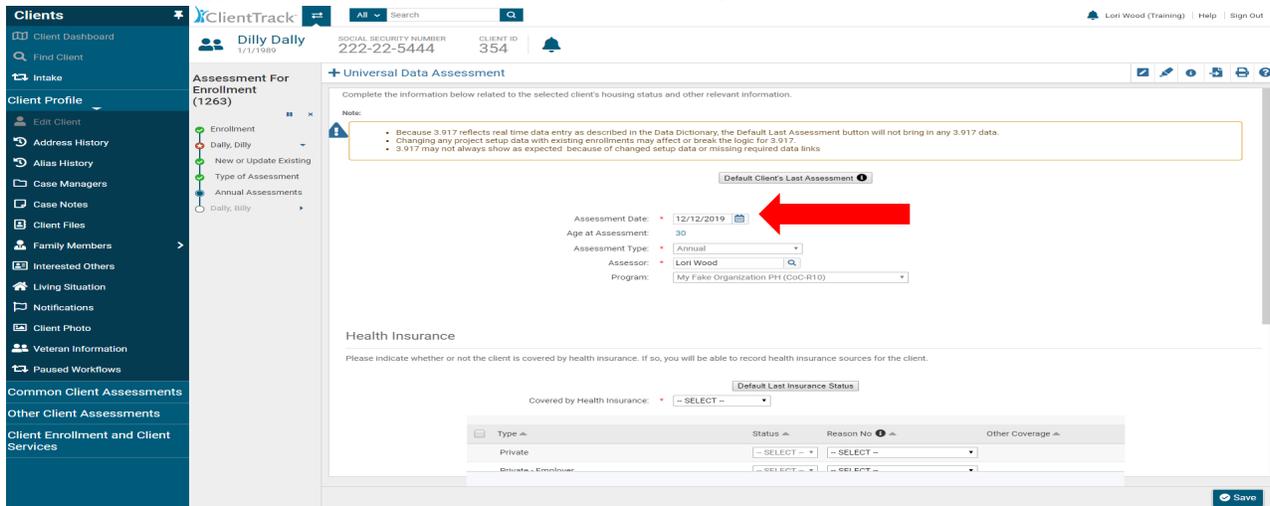
The next screen will prompt you to choose **“New Assessment”** or **“Update Existing”**.



Next, **“Type of Assessment”** will appear and prompt you to choose **“During Program Enrollment”** or **“Annual”**. Choose **“Annual”** for the annual assessment.

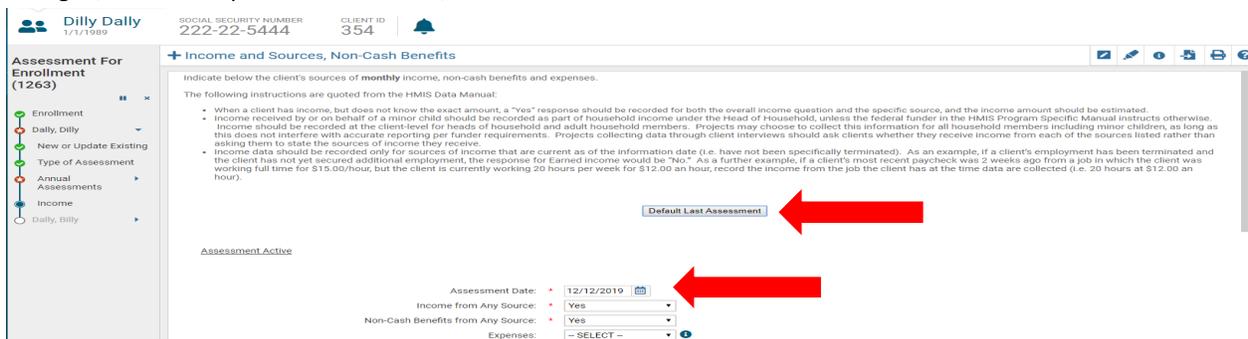
### HMIS UNIVERSAL DATA ASSESSMENT FOR UPDATE/ANNUAL WORKFLOW

Review the head of household’s universal data and document any changes. Please note that you can change the assessment date at the top of the screen to reflect the actual date of the assessment, if entered at another time. For **“Assessment Type”**, choose **“Annual”**. When finished updating the information, click **“Save”**.



### HMIS INCOME AND SOURCES, NON-CASH BENEFITS

Complete the **“Income and Sources, Non-Cash Benefits”** assessment. If the client’s income/benefits have not changed, click on **“Default Last Assessment”**, then click **“Save and Close”**. If the client’s income/benefits have changed, enter the updated information, then click **“Save and Close”**.



Assessment For Enrollment (1263)

- Enrollment
- Dilly, Dilly
- New or Update Existing
- Type of Assessment
- Annual Assessments
- Income
- Dilly, Billy

+ Income and Sources, Non-Cash Benefits

Income

<input type="checkbox"/>	Type ▲	Description ▲	Monthly Amount ▲	Restriction ?* ▲
<input type="checkbox"/>	Earned Income			Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Self Employment			Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Worker's Compensation			Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Unemployment Insurance			Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Pension			Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Supplemental Security Income			Restrict to MOU/InfoRelease ▼
<input checked="" type="checkbox"/>	Social Security Disability Income	SSDI	\$750.00	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Retirement (Social Security)			Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Veteran's Pension			Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Veteran's Disability Payment			Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	TANF			Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Child Support			Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Income			Restrict to MOU/InfoRelease ▼
Count/Total Monthly Income:			1	\$750.00

Non-Cash Benefits

<input type="checkbox"/>	Type ▲	Description ▲	Monthly Amount ▲	Restriction ?* ▲
<input checked="" type="checkbox"/>	Food Stamps/Money for food on benefits card		\$50.00	Restrict to MOU/InfoRelease ▼
<input checked="" type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children		\$150.00	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	TANF Child Care Services			Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	TANF Transportation Services			Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other TANF-funded Services			Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Source			Restrict to MOU/InfoRelease ▼
Count/Total Monthly Income:			2	\$200.00

<sup>1</sup> Depreciated in 2017 (HMIS v6.1)

Restriction: \*  Restrict to Organization ?  Restrict to MOU/InfoRelease

Save and Close

Click **“Finish”** to end the workflow

The screenshot shows the ClientTrack interface for a client named 'Dilly Dilly' (DOB: 1/1/1989, SSN: 222-22-5444, Client ID: 354). The assessment is titled 'Assessment For Enrollment (1263)'. A message states 'You're done! All required steps have been completed.' A 'Finish' button is visible with the text 'Close the workflow', and a red arrow points to it from the right.

HMIS Universal Data Assessment for Child at Update/Annual

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

The screenshot shows the 'Mighty Mouse' assessment form for 'Universal Data Assessment' for a client named 'Mouse, Mighty' (DOB: 3/3/2011, SSN: 002-00-2000, Client ID: 554). The assessment is titled 'Assessment For Enrollment (1263)'. The form includes fields for 'Assessment Date' (11/22/2019), 'Age at Assessment' (8), 'Assessment Type' (Annual), 'Assessor' (Lori Wood), and 'Program' (My Fake Organization (ES - R10)). Below these fields is a section for 'Health Insurance' with a 'Covered by Health Insurance' dropdown set to 'No'. A table lists various insurance types with 'Status' and 'Reason No.' dropdowns.

Type	Status	Reason No.	Other Coverage
Private	No	-- SELECT --	
Private - Employer	No	-- SELECT --	
Private - Individual	No	-- SELECT --	
Medicare	No	-- SELECT --	
Medicaid	No	-- SELECT --	
State Children's Health Insurance Program S-CHIP	No	-- SELECT --	
Military Insurance	No	-- SELECT --	
Other Public	No	-- SELECT --	
State Funded	No	-- SELECT --	
Combined Children's Health Insurance / Medicaid Program	No	-- SELECT --	
Indian Health Service (IHS)	No	-- SELECT --	

## PROGRAM DISCHARGE

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

- Go to the client record;
- Click on the blue action wheel beside your project enrollment located in the center of the client record; Select **“Exit the Enrollment”** in the drop down list that appears after clicking on the blue action wheel; And complete the information prompted for through the Exit workflow and save as you go.

The screenshot shows the ClientTrack interface for a client named Minnie Mouse. The left sidebar contains navigation options like 'Client Profile', 'Common Client Assessments', and 'Other Client Assessments'. The main content area displays 'Minnie Mouse's Information' and 'Minnie's Enrollments'. A dropdown menu is open over the 'My Fake Organization (ES - R10)' enrollment, with a red arrow pointing to the 'Exit the Enrollment' option.

On the first screen of the exit workflow, you will be asked for the **“Exit Date,” “Destination,” “Exit Reason,”** and whether to **“End Case Assignment.”** Please note that all fields with an **asterisk \*** are required.

The screenshot shows the 'Enrollment Exit' workflow screen. The header includes the client's name 'Minnie Mouse', social security number '001-01-0001', and client ID '156'. The main form area contains the following fields:

- Exit Date:** \* 11/21/2019
- Destination:** \* Rental by client, no ongoing housing subsidy
- Exit Reason:** Completed Program
- Case Manager Assignment:** Lori Wood
- End Case Assignment:**

### HMIS UNIVERSAL DATA ASSESSMENT FOR EXIT WORKFLOW

Complete the required information and click **“Save”** to continue. NOTE: If the client’s information has not changed during the enrollment period, you may click on the **“Default Client’s Last Assessment”** button which will populate the fields with the most recent client assessment information.

**Minnie Mouse** 1/17/1981 SOCIAL SECURITY NUMBER 001-01-0001 CLIENT ID 156

**HUD Program Exit** + Universal Data Assessment

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

Note:

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

**Default Client's Last Assessment**

Assessment Date: 11/21/2019  
 Age at Assessment: 38  
 Assessment Type: Exit  
 Assessor: Lori Wood  
 Program: My Fake Organization (ES - R10)

**Health Insurance**

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

Covered by Health Insurance: Yes

**Default Last Insurance Status**

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

### HMIS BARRIERS ASSESSMENT FOR EXIT WORKFLOW

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

**Barriers**

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

**View Barrier History**

Assessment Active

Identified Date: 11/21/2019  
 Screen: HMIS Barriers  
 Disabling Condition: Yes

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

## INCOME AND SOURCES, NON-CASH BENEFITS FOR EXIT WORKFLOW

Complete the Financial information for the head of household at exit and document any changes to the household income. Be sure to scroll down to complete Non-Cash Benefits and click **“Save and Close”** when finished.

### + Income and Sources, Non-Cash Benefits



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

The following instructions are quoted from the HMIS Data Manual:

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

**Default Last Assessment**

Assessment Active

Assessment Date: \* 11/21/2019

Income from Any Source: \* Yes

Non-Cash Benefits from Any Source: \* Yes

Expenses: -- SELECT --

### + Income and Sources, Non-Cash Benefits



Income

<input type="checkbox"/>	Type ▲	Description ▲	Monthly Amount ▲	Restriction
<input type="checkbox"/>	Earned Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Self Employment	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Worker's Compensation	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Unemployment Insurance	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Pension	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Supplemental Security Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Social Security Disability Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Retirement (Social Security)	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Veteran's Pension	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Veteran's Disability Payment	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	TANF	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Child Support	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
<input type="checkbox"/>	Other Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease ▼
Count/Total Monthly Income:			0	\$0.00

**Definitions of Sources of Income**

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

Non-Cash Benefits

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

Restriction:  Restrict to Organization  Restrict to MOU/InfoRelease

[Save and Close](#)

**Definitions of Non-Cash Benefits**

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

The “Exit Destination” and “Exit Reason” will be completed for all household members being discharged from the program.

### HMIS UNIVERSAL DATA ASSESSMENT FOR CHILD AT EXIT

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

**Universal Data Assessment**

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

Note:

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

Default Client's Last Assessment

Assessment Date: 11/21/2019  
 Age at Assessment: 7  
 Assessment Type: Exit  
 Assessor: Lori Wood  
 Program: My Fake Organization (ES - R10)

**Health Insurance**

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

Default Last Insurance Status

Covered by Health Insurance: Yes

Type	Status	Reason No	Other Coverage
Health insurance obtained through COBRA	No	-- SELECT --	
State Employee	No	-- SELECT --	

Save No Changes

### HMIS BARRIERS ASSESSMENT FOR CHILD AT EXIT

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

**Barriers**

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

View Barrier History

Assessment Active

Identified Date: 11/21/2019  
 Screen: HMIS Barriers  
 Disabling Condition: Yes

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

COMPLETING THE EXIT WORKFLOW

When you have completed all exit assessment for all household members, you will be asked to finish the exit workflow. Click **“Finish”** to complete the discharge for your clients.

You will then return to the client dashboard where you can see the project exit dates now as see below. If you have also selected **“End Case Assignment”** on the exit workflow, you will see that your status has changed to **“Inactive”** on the client dashboard under **“Case Manager Assignments.”** If you forgot to click on the box beside **“End Case Assignment”** during the exit workflow, you can click on the little pencil beside your name under **“Case Manager”** to edit your status to **“Inactive”** to remove the discharged client from your case load.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination	Last Assessed
My Fake Organization (ES - R10)	2	11/21/2019		11/21/2019	5082	5084	Rental by client, no ongo...	11/21/2019

Case Manager	Begin Date	Status	End Date	Enrollment
Lori Wood	11/21/2019	Inactive	11/21/2019	My Fake Organization (ES - R10)

## Unique Program Requirements at Exit

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

1. PATH
2. HOPWA
3. RHY

### 1. PATH AT EXIT

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

HUD Program Exit

Happy Friday 3/3/1989 SOCIAL SECURITY NUMBER 222-55-4444 CLIENT ID 3329

#### + SOAR Connection

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

Default Client's Last Assessment ⓘ

Assessment Active

Assessment Date: \* 11/22/2019

Connection with SOAR: \* -- SELECT --

Restriction: \*  Restrict to Organization ?  Restrict to MOU/InfoRelease

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

HUD Program Exit

Happy Friday 3/3/1989 SOCIAL SECURITY NUMBER 222-55-4444 CLIENT ID 3329

#### + Current Living Situation

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

Information Date: \* 11/22/2019

Enrollment: \* 11/22/2019 - 11/22/2019 - My Fake Organization SSO (PATH-R10)

#### Current Living Situation Information

Current Living Situation: \* Place not meant for habitation

Location Detail:

Record Contact:

#### Contact Service Information

Contact Service: \* PATH - Contact

Location: My Fake Organization

Use Geolocation:

Comments:

Restriction: \*  Restrict to Organization ?  Restrict to MOU/InfoRelease

2. HOPWA AT EXIT

A completed **“Assistance Assessment”** will be required at exit for HOPWA.

Happy Friday 3/3/1989 SOCIAL SECURITY NUMBER 222-55-4444 CLIENT ID 3329

Assistance Assessment

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

Default Client's Last Assessment

Assessment Active

Assessment Date: 11/22/2019

Search

Medical Assistance Type	Status	Reason No (if applicable)	Restriction
<input checked="" type="checkbox"/> Receiving Public HIV/AIDS Medical Assistance	Yes		Restrict to MOU/InfoRelease
<input checked="" type="checkbox"/> Receiving AIDS Drug Assistance Program (ADAP)	Yes		Restrict to MOU/InfoRelease

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

Happy Friday 3/3/1989 SOCIAL SECURITY NUMBER 222-55-4444 CLIENT ID 3329

+ T-cell/Viral Measurements

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

Assessment Active

Assessment Date: 11/22/2019

T-cell (CD4) Count Available: --SELECT--

Viral Load Available: --SELECT--

Date	Measurement	Value	How was the data obtained	Restriction
	Viral Load			Restrict to MOU/InfoRelease
	T-cell Count			Restrict to MOU/InfoRelease

Restriction:  Restrict to Organization  Restrict to MOU/InfoRelease

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

HUD Program Exit

Happy Friday  
3/3/1989

SOCIAL SECURITY NUMBER  
222-55-4444

CLIENT ID  
3329

+ Housing Assessment

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

Assessment Active

Assessment Date: \* 11/22/2019

Housing Assessment at Exit: \* Moved to new housing unit

Subsidy For New: \* With on-going subsidy

Restriction: \*  Restrict to Organization  Restrict to MOU/InfoRelease

### 3. RHY AT EXIT

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

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

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

HUD Program Exit

kny enrollment  
1/1/2003

SOCIAL SECURITY NUMBER  
111-88-7788

CLIENT ID  
3330

+ HMIS 2017 Employment Assessment

Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week prior to assessment, looking for work.

Assessment Active

Assessment Date: \* 11/22/2019

Employed?: \* Yes

Type of Employment: \* Full-Time

Restriction: \*  Restrict to Organization  Restrict to MOU/InfoRelease

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

The screenshot shows the 'Health Assessment' form. At the top, the user is logged in as 'Rhy Enrollment' on 1/1/2003. The client's information is displayed: SOCIAL SECURITY NUMBER 111-88-7788 and CLIENT ID 3330. A notification bell icon is present. On the left, a sidebar shows the 'HUD Program Exit' workflow with steps: Exit Enrollment, Exit Assessments, Barriers / Special Needs, Income, Employment, Child Education, Health, and RHY Exit Assessment. The 'Health' step is currently active. The main content area is titled '+ Health Assessment' and contains the following fields:
 

- Assessment Date: \* 11/22/2019 (with a calendar icon)
- General Health Status: \* --SELECT-- (dropdown menu)
- Dental Health Status: \* --SELECT-- (dropdown menu)
- Mental Health Status: \* --SELECT-- (dropdown menu)
- Restriction: \*  Restrict to Organization  Restrict to MOU/InfoRelease (with a help icon)

 A 'Default Client's Last Assessment' button with an information icon is also visible.

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

The screenshot shows the 'RHY Exit Assessment' form. At the top, the user is logged in as 'Rhy Enrollment' on 1/1/2003. The client's information is displayed: SOCIAL SECURITY NUMBER 111-88-7788 and CLIENT ID 3330. A notification bell icon is present. On the left, a sidebar shows the 'HUD Program Exit' workflow with steps: Exit Enrollment, Exit Assessments, Barriers / Special Needs, Income, Employment, Child Education, Health, RHY Exit Assessment, Counseling Assessment, and Safe and Appropriate Exit. The 'RHY Exit Assessment' step is currently active. The main content area is titled '+ RHY Exit Assessment' and contains the following fields:
 

- Assessment Date: \* 11/22/2019 (with a calendar icon)
- Project Completion Status: \* Completed project (dropdown menu)
- Commercial Sexual Exploitation/Sex Trafficking: Ever received anything in exchange for sex (e.g. money, food, drugs, shelter): \* No (dropdown menu)
- Labor Exploitation/Trafficking: Ever afraid to quit/leave work due to threats of violence to yourself, family, or friends: \* No (dropdown menu); Ever promised work where work or payment different than you expected: \* No (dropdown menu)
- Restriction: \*  Restrict to Organization  Restrict to MOU/InfoRelease (with a help icon)

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

**Rhy Enrollment** 1/1/2003 SOCIAL SECURITY NUMBER 111-88-7788 CLIENT ID 3330

**HUD Program Exit**

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

**+ Counseling Assessment**

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

Default Client's Last Assessment ⓘ

Assessment Active

**Pre-Exit**

Assessment Date: \* 11/22/2019

Counseling received by client: \* Yes

Type(s) of Counseling Received: \* Individual, Family, Group - including peer counseling

Number of sessions received by exit: \* 12

Total number of sessions planned in youth's treatment or service plan: \* 5

**Post-Exit**

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

Restriction: \*  Restrict to Organization  Restrict to MOU/InfoRelease

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

**Rhy Enrollment** 1/1/2003 SOCIAL SECURITY NUMBER 111-88-7788 CLIENT ID 3330

**HUD Program Exit**

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

**+ Safe and Appropriate Exit**

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

Default Client's Last Assessment ⓘ

Assessment Active

Assessment Date: \* 11/22/2019

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

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

Client has permanent positive adult connections outside of project: \* No

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

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

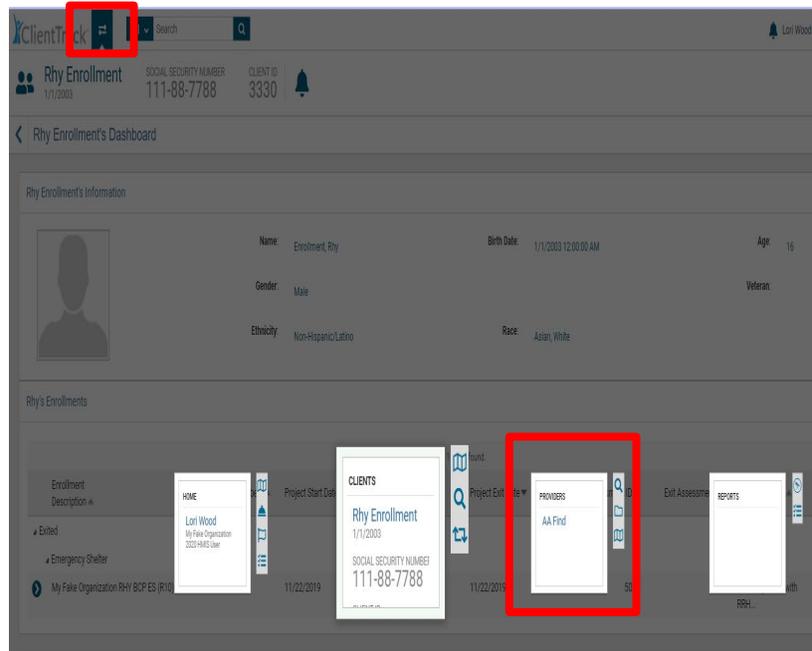
Restriction: \*  Restrict to Organization  Restrict to MOU/InfoRelease

**MANAGING PROVIDERS**

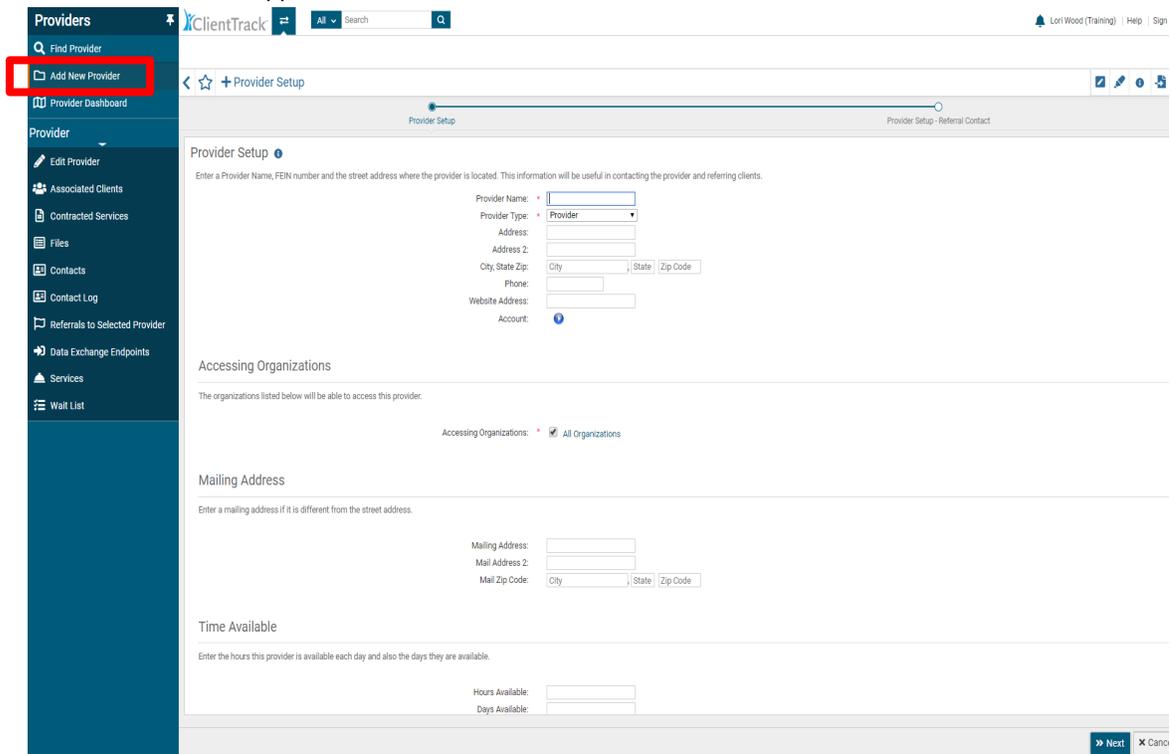
You can add providers (other agencies) you work with into a database to easily identify providers on services and/or referrals.

Follow these steps to add a provider to your database of providers:

- Click on the blue box with the white arrows beside the ClientTrack logo at the top of the screen to toggle to the “Providers” screen.
- Conduct a search for the Provider in the database by clicking on the “Find Provider” link in the upper left-hand corner of the screen.

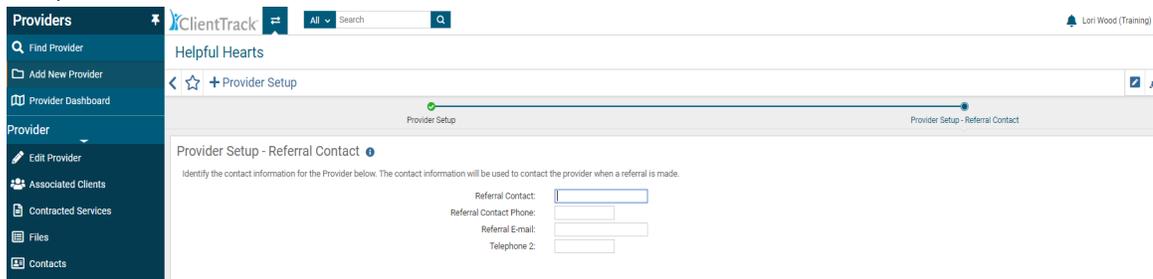


- Click on the “Add New Provider” link if the Provider is not already in the system located below the “Find Provider” link in the upper left-hand corner



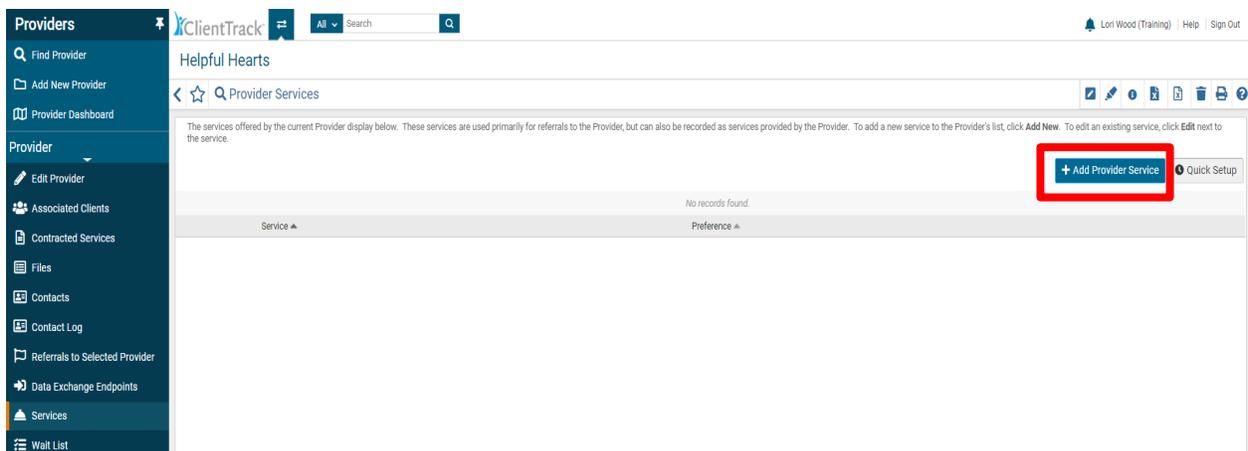
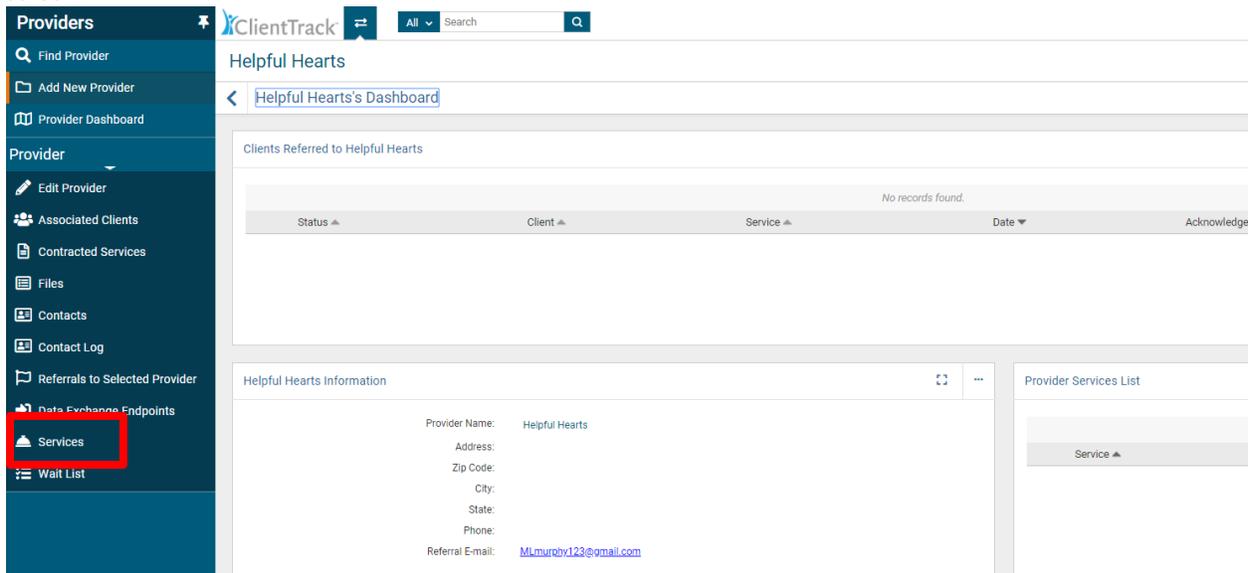
- Complete the provider information. You must complete information that has an asterisk \* before continuing.
- Click “Next” in the bottom right-hand corner of the screen.

- Complete “Referral Contact” information.

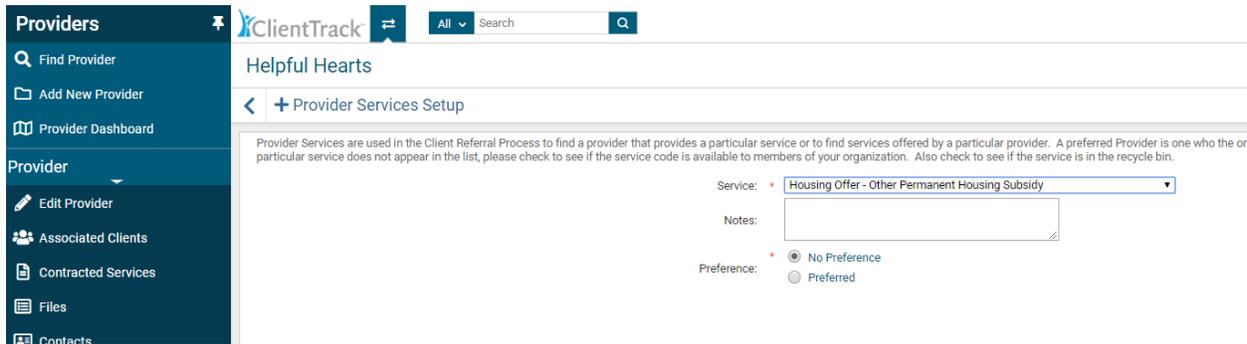


- Click on “Finish” to complete the addition of a Provider to your searchable list. You can go back to the previous screen if necessary, by clicking on “Previous.”

After adding the provider to the provider database through the above steps, **you need to complete one more step before you can access the provider when setting up referrals and services.** You must correlate a service with the provider before the provider is available for services and referrals on a client record. You can do this by remaining on the provider record and clicking on “Services” in the list of Menu Items under “Provider” found on the left-hand side of the screen as seen below. Click on the “Add Provider Service” button on the right-hand side of the screen.



Then select a service you want correlated with the provider and click **“Save”** to add the service to the provider record. You can add as many services as you would like by repeating these steps. Once you have finished this final step, you will be able to select the provider when creating a referral or service on a client record.



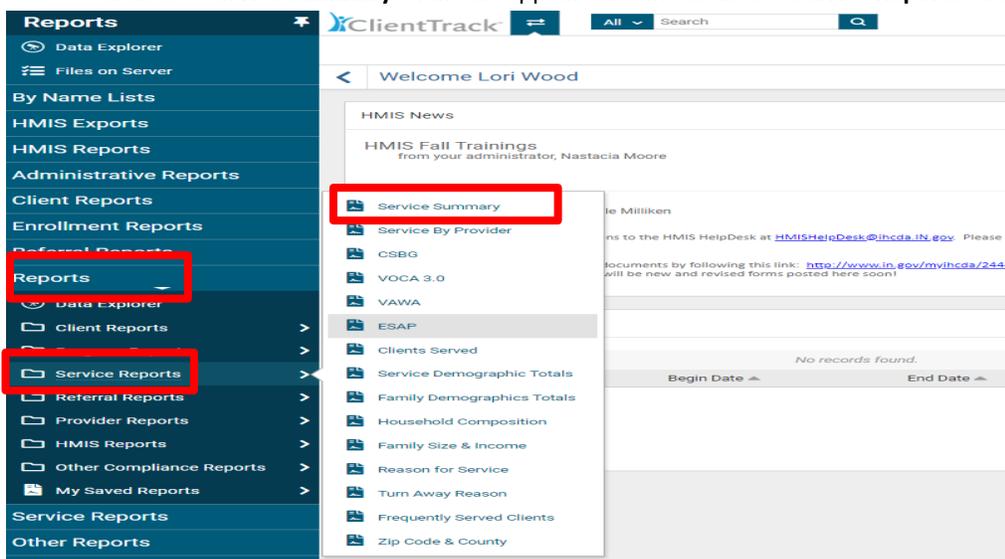
## BASIC REPORTS

### SERVICE SUMMARY REPORT

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

#### To Run a Service Summary Report:

- Click on **“Reports”** found in the floating menu where **“Home,” “Client,” “Providers”** and **“Reports”** are displayed. (Navigate to the floating menu by clicking on the **double arrow icon** to the right of the **ClientTrack Logo** at the top left of the screen)
- Click on **“Reports”** found in the list of menu options on the left-hand side of the screen. Another list of reports should appear as you hover on the **“Service Reports”** option.
- Click on **“Service Summary”** link that appears first in the list of **“Service Reports”** after hovering over it.



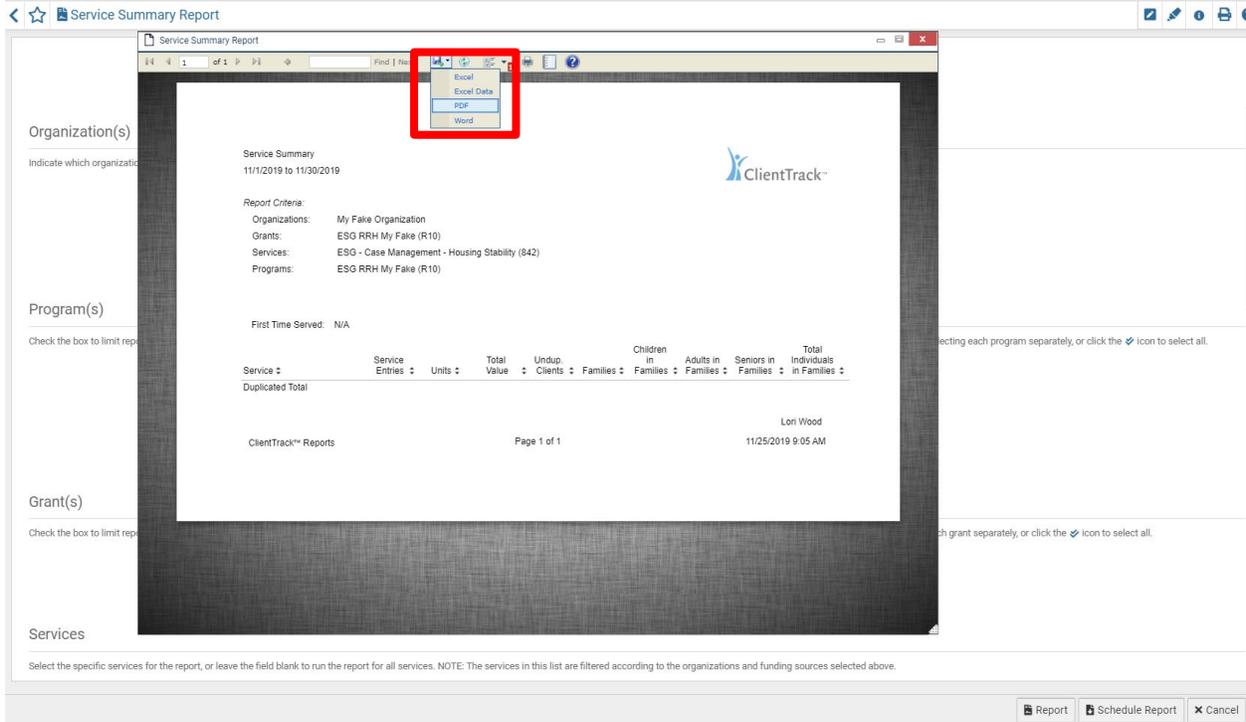
- Set up your report parameters by: *(Please note that all fields with an asterisk \* are required fields)*
  - **Complete the date range** – There are a couple of options for setting the date range. You can select from the **“Predefined Date Range,”** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **“Between.”** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2016 and 12/31/2016. This will give you all the clients in your program for the entire year of 2016.
  - **Filter by “Programs”** – Select the **“Program”** you want to run a Service Summary for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a program. You can run multiple programs on the same report. Simply select more than one **“Program”** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To deselect a program, simply click on it again and you will see the green check mark disappear.
  - **Filter by “Grants”** – Select the **“Grant”** you want to run the report for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. However, your grant options will be dictated by the **“Program(s)”** you selected in the **“Filter by Program(s)”** box. If more than one grant appears, simply select more than one **“Grant”** by clicking on the name in the box. To deselect one, simply click on it again and you will see the green check mark disappear.
  - **Filter by Services, User(s), Housing Status, Results by Age, State(s), Counties, Zip Code(s) and more** – Select a variety of parameters to extract more specific service data from clients your organization has served. Most of these selections will allow you to select more than one option in the box. Again, simply click on the option in the box and a green check mark will appear. To deselect an option, click on it again and you will see the green check mark disappear.

The screenshot displays the 'Service Summary Report' configuration interface in ClientTrack. The left sidebar contains a navigation menu with categories like 'By Name Lists', 'HMIS Exports', 'HMIS Reports', 'Administrative Reports', 'Client Reports', 'Enrollment Reports', 'Referral Reports', 'Reports', 'Service Reports', and 'Other Reports'. The main content area is titled 'Service Summary Report' and includes a search bar and user information (Lori Wood (Training) | Help | Sign Out). Below the title, there are instructions on how to save report settings. The configuration section includes:
 

- Saved Report Settings:** A dropdown menu currently set to '- SELECT -'.
- Date Range:** A section for indicating the time period, with a 'Predefined Date Range' dropdown set to 'Current Month' and 'Service Date Between' fields showing '11/01/2019' and '11/30/2019'.
- Organization(s):** A list of organizations with checkboxes, including '4 County', 'A Hand Up', 'ACTION Inc. of Delaware County', 'Affordable Housing Corporation of Marion', 'Aging & Community Services of South Cent', and 'AIDS Ministries'.
- Program(s):** A list of programs with checkboxes, including 'Filter by Program(s)', 'ESG Prevention My Fake (R10)', 'ESG RSH My Fake (R10)', 'HOPMA STRUK', 'LHMAP prevention', 'My Fake IHCDA Coordinated Entry (R1)', and 'My Fake Oig Prevention (ESG - R10)'. A red arrow points to the 'Report' button at the bottom right.
- Grant(s):** A section for selecting grants, currently empty.

 At the bottom right, there are buttons for 'Report', 'Schedule Report', and 'Cancel'.

- Click on the **“Report”** button found in the bottom right-hand corner of the screen. You should see your Service Summary Report pop up in a new window within seconds. You can export your report to a pdf file for email transmission or record-keeping by clicking on the PDF icon located in the menu at the top of the page. (Click on the floppy disc and the save options appear in a drop-down list. Excel, Excel Data, PDF and Word) Click on PDF

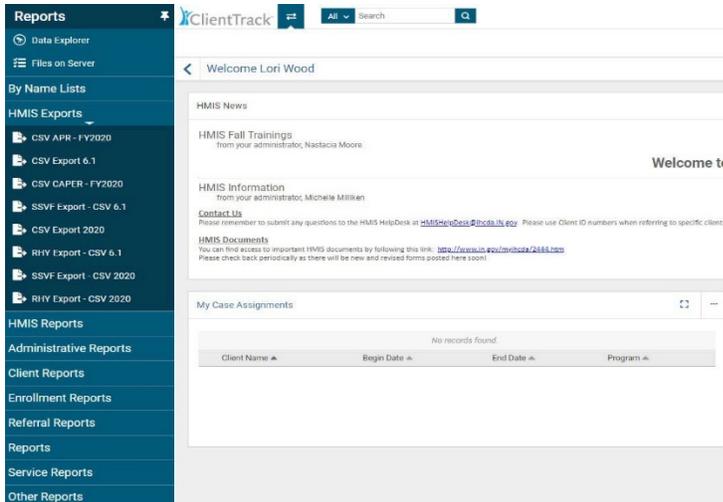


## ANNUAL PERFORMANCE REPORT (APR)

The APR is a comprehensive report of your program – who you served and how you served them. It is recommended that you run an APR often throughout the year to track missing data so that your report is complete when it is time for the annual submission. Here are quick steps to running the report and cleaning up missing data.

### To Run an APR:

- From the “Reports” workspace, click on the “HMIS Exports” Menu Group on the left-hand side of the screen. Select the “CSV APR-FY2020”



- Set up your report parameters by: *(Please note that all fields with an **asterisk \*** are required fields)*
- **Complete the date range** – There are a couple of options for setting the date range. You can select from the **“Predefined Date Range,”** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **“Between.”** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2016 and 12/31/2016. This will give you all the clients in your program for the entire year of 2016.
- **Select the “Grant Program” and “Grant Program Component”** - Select the grant associated with your program with the drop down for **“Grant Program.”** This will prompt the next selection in **“Grant Program Component.”** If you do not know this information, feel free to try several selections to find the correct options for your program. You won’t break it by choosing different options. If you do not see the correct set up information here, contact the HMIS Help Desk by emailing [HMISHelpDesk@ihcda.IN.gov](mailto:HMISHelpDesk@ihcda.IN.gov)
- **Select the “Grant(s)”** – You may see several options to choose from after selecting **“Grant Program”** and **“Grant Program Component.”** Again, the Grant Program and Grant Program Component will determine the options you see in this box. Select the **“Grant”** you want to run the APR for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. Simply select more than one **“Grant”** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To deselect one, simply click on it again and you will see the green check mark disappear.
- **Select the “Project Type”**- Select a project type with the drop-down list that appears. You may only select one **“Project Type”** at a time. Please note that Project Type and Program must be selected to populate the final measurement on Q.36 of the report. You can run your report without selecting **“Project Type”** and **“Program,”** but the measurement on the last page will not populate data.
- **Filter by “Program(s)”** - Click on the name in the box and a green check mark will appear to show that you have successfully selected it. Multiple programs can be selected here as well like the **“Grant”** parameter. You can deselect a program by clicking on it again and the green check mark will disappear.

- Click on the **“Run Export”** button found in the bottom right-hand corner of the screen. You should see your report pop up in a new window within seconds.

#### To Drill Down and Find Missing Data

After your APR populates and is saved on your computer, you can view each of the APR Questions in a separate Excel spreadsheet. This will allow you to find and review missing data. You will see the word “Missing” on the spreadsheet where clients are missing data.

- It may be helpful to **export it** to an Excel Spreadsheet to find the missing data in a more detailed, organized format.
- To export the client data to an Excel Spreadsheet, click on the **Excel icon with the gold spindle** in the upper right-hand corner of the report window. You will be asked to **“Open”** or **“Save”** the spreadsheet, select **“Open”** to review the data. ***Be sure to clear your downloads in your Internet browser after exporting client data.***
- You will see the word **“MISSING”** on the spreadsheet where clients are missing data. The columns are labeled at the top of the spreadsheet and client names are on the far left-hand side of the spreadsheet. You can then go to client records and complete the missing data.

#### To Complete or Edit Missing Data

In unusual cases, there may be a missing enrollment ID for an entry or exit of a client. You can complete the entry and/or exit assessments after an HMIS technician has set up the master assessment for you. If you need assistance with setting up the master assessment, contact the HMIS Help Desk at [HMISHelpDesk@ihcda.IN.gov](mailto:HMISHelpDesk@ihcda.IN.gov) . Follow these steps to complete missing data on the assessments with enroll and exit IDs:

- Go to the client’s record who is reported as missing the data on the APR.
- Click on the blue action wheel beside your program enrollment found on the client dashboard under **“[Client Name] Enrollments”** located centrally on the client’s record.
- Select **“Review Entry Assessments”** or **“Review Exit Assessments”** (depending on which one you need to complete) in the drop-down list that appears after clicking on the blue action wheel.
- Complete the missing data by clicking on the little notepad beside the appropriate assessment listed.
- Save as you edit or complete assessments by scrolling down on the assessment screen and clicking on **“Save.”**
- Blue check marks will appear to indicate an assessment is completed.

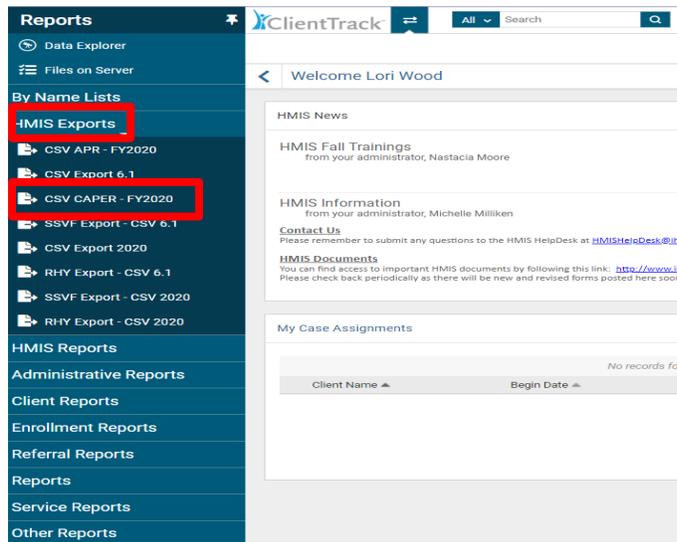
When you have completed the missing data on client records, run your APR again to review it and ensure all missing data is resolved. Please don’t hesitate to contact the HMIS Help Desk if you need any assistance with your report or completing missing data.

## CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT (CAPER)

The CAPER is a comprehensive report of your ESG program – who you served and how you served them. Here are quick steps to running the report and viewing the data:

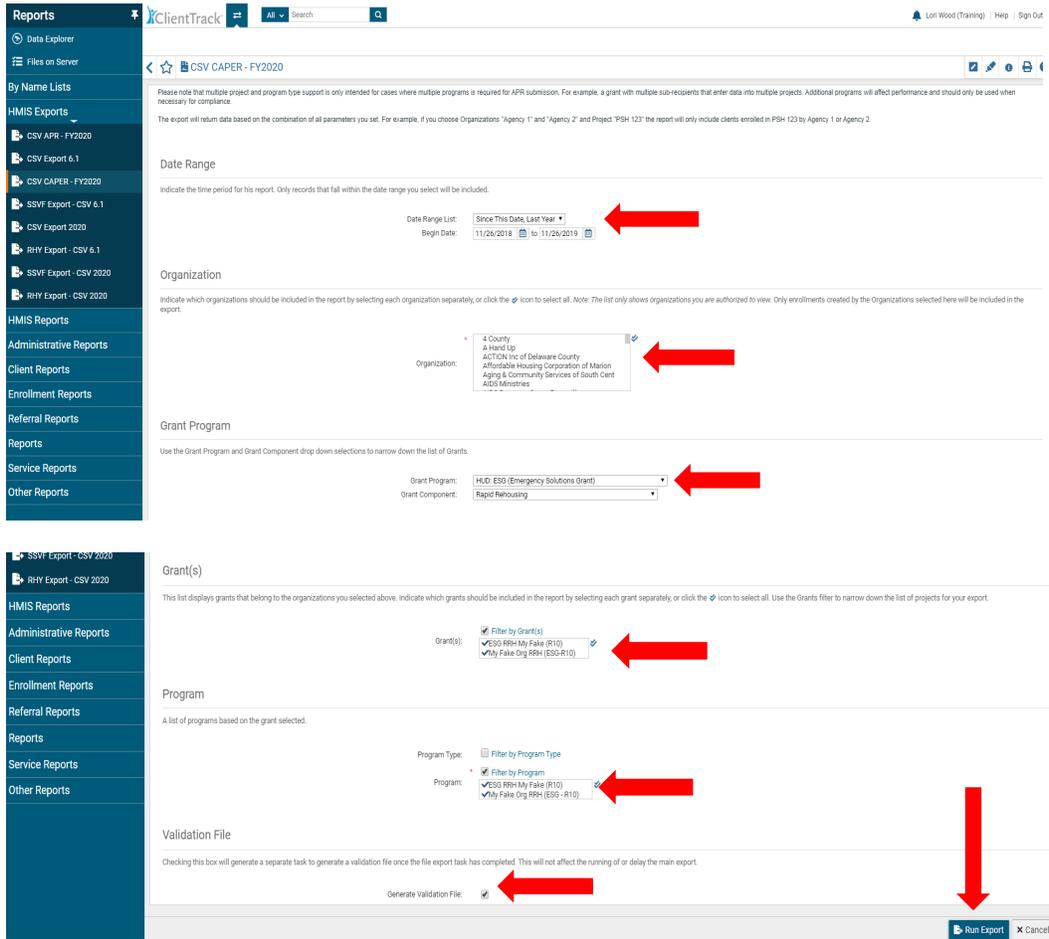
### To Run a CAPER

- On the “**Reports**” workspace, click on “**HMIS Exports**”.
- Next, select “**CSV CAPER – FY2020**” found in the list below “**HMIS Exports**” on the left-hand side of the screen.



- Set up your report parameters by: *(Please note that all fields with an asterisk \* are required fields)*
- **Complete the date range** – There are a couple of options for setting the date range. You can select from the “**Predefined Date Range**,” though this may not provide you the exact dates you need. You can fill in the dates found below this labeled “**Between**.” The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2016 and 12/31/2016. This will give you all the clients in your program for the entire year of 2016.
- **Select the “Grant Program” and “Grant Program Component”** - Select the grant associated with your program with the drop down for “**Grant Program**.” This will prompt the next selection in “**Grant Program Component**.” If you do not know this information, feel free to try several selections to find the correct options for your program. You won’t break it by choosing different options. If you do not see the correct set up information here, contact the HMIS Help Desk by emailing [HMISHelpDesk@ihcda.IN.gov](mailto:HMISHelpDesk@ihcda.IN.gov)
- **Select the “Grant(s)”** – You may see several options to choose from after selecting “**Grant Program**” and “**Grant Program Component**.” Again, the Grant Program and Grant Program Component will determine the options you see in this box. Select the “**Grant**” you want to run the CAPER for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. Simply select more than one “**Grant**” by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To deselect one, simply click on it again and you will see the green check mark disappear.
- **Select the “Project Type”**- Select a project type with the drop-down list that appears. You may only select one “Project Type” at a time. Please note that Project Type and Program must be selected to populate the final measurement on Q.36 of the report. You can run your report without selecting “Project Type” and “Program,” but the measurement on the last page will not populate data.
- **Filter by “Program(s)”** - Click on the name in the box and a green check mark will appear to show that you have successfully selected it. Multiple programs can be selected here as well like the “Grant” parameter. You can deselect a program by clicking on it again and the green check mark will disappear.

- Click on the **“Run Export”** button found in the bottom right-hand corner of the screen. You should see your report pop up in a new window within seconds.



Enter a password in the **“Password”** box to run the report then enter the password again in the **“Confirm Password”** box then click **“Done”**. Next, a pop-up window will appear stating **“Your export has been queued and will be processed at the next available time.”** Click **“OK”**

- Retrieving the Export: The export runs in the background, so you can still use ClientTrack while it is running. Generally speaking, the download is ready in 10-15 minutes.
  - Select **“Files on Server”** on the **“Reports”** workspace on the left-hand side of the screen.
  - Click the download icon to download your report to your local PC
  - Find the report on your PC and double click it to run the report

