

How to Guide

Updating “Current Living Situation” to record a “Contact Service” HMIS PATH Projects

1. The “Current Living Situation” must be recorded in HMIS to include a “Contact Service” for each interaction with a PATH client. Below is the excerpt from the 2020 HUD Data Standards Manual explaining the process.

Contacts: In addition to the Universal Data Elements, street outreach projects are expected to record every contact made with each client in the HMIS via data element 4.12 Current Living Situation (formerly “Contact”). A contact is defined as an interaction between a worker and a client designed to engage the client. Contacts include activities such as a conversation between the street outreach worker and the client about the client’s well-being or needs, an office visit to discuss their housing plan, or a referral to another community service. A Current Living Situation (4.12) must be recorded anytime a client is met, including when a Date of Engagement (4.13) or Project Start Date (3.10) is recorded on the same day.

1. From the “Clients” workspace in HMIS:
 - a. Perform a “Find Client” to search for the existing Client record in HMIS.

The screenshot shows the 'Find Client' search interface in ClientTrack. The left sidebar is highlighted with a red box, showing the 'Find Client' option. The main content area displays a search form with the following fields:

- First Name:
- Last Name:
- Middle Name:
- Full Name (Last, First):
- Social Security Number:
- Birth Date:
- Client ID:

At the bottom right of the search form, there is a 'Search' button. The top of the interface shows the 'Clients' workspace, the 'ClientTrack' logo, and a search bar. The user's profile information is visible at the top right, including the name 'Lori Wood (Training)', 'Help', and 'Sign Out'.

2. Once the Client is located, select the Client which then takes you to the “Client Dashboard” screen

ClientTrack | All Search

Client: Kermit Frog | SOCIAL SECURITY NUMBER: 312-92-1117? | CLIENT ID: 3285

Find Client

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

First Name: | Last Name: | Middle Name: | Full Name (Last, First): | Social Security Number: | Birth Date: | Client ID:

Search

1 result found.

First Name	Last Name	Middle Name	SSN	Birth Date	Client ID
Kermit	Frog		312-92-1117	08/14/1982	3285

ClientTrack | All Search

Client: Kermit Frog | SOCIAL SECURITY NUMBER: 312-92-1117? | CLIENT ID: 3285

Kermit Frog's Dashboard

Kermit Frog's Information

Name: Frog, Kermit | Birth Date: 8/14/1982 | Age: 38
 Gender: Male | Veteran: Client doesn't know
 Ethnicity: Non-Hispanic/Latino | Race: Black or African American

Kermit's Enrollments

4 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-in Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination	Last Assessed
Emergency Shelter								
My Fake Organization (ES - R10)	1	09/09/2020			5258			9/9/2020
Homelessness Prevention								
ESG-CV Homeless Prevention (HP-R8a)	1	07/15/2020						
Services Only								
My Fake Organization SSG (PATH-R10)	1	08/04/2020			5235			8/4/2020
Coordinated Entry								
My Fake Coordinated Entry (R1)	1	10/30/2018		10/30/2018	4957		Permanent housing (other ...	10/30/2018

Case Manager Assignments

2 results found.

Case Manager	Begin Date	Status	End Date	Enrollment
Grant Peters	07/15/2020	Inactive	11/09/2020	ESG-CV Homeless Prevention (HP-R8a)
Training 08	10/30/2018	Inactive	10/30/2018	My Fake Coordinated Entry (R1)

3. Select the **“Client Profile”** tab located in the menu on the left side of the screen.
 - a. Next, select **“Living Situation.”**

Client Profile

Kermit Frog
8/14/1982 SOCIAL SECURITY NUMBER: 312-92-111? CLIENT ID: 3285

Kermit Frog's Information

Name: Frog, Kermit Birth Date: 8/14/1982 Age: 38
 Gender: Male Veteran: Client doesn't know
 Ethnicity: Non-Hispanic/Latino Race: Black or African American

Kermit's Enrollments

4 results found.

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Project Exit Date	Enroll Assessment ID	Exit Assessment ID	Exit Destination	Last Assessed
Active								
Emergency Shelter								
My Fake Organization (ES- R10)	1	09/09/2020			5258			9/9/2020
Homelessness Prevention								
ESG-CV Homeless Prevention (HP-R6a)	1	07/15/2020						
Services Only								
My Fake Organization S20 (PATH-R10)	1	08/04/2020			5235			8/4/2020
Exited								
Coordinated Entry								
My Fake Coordinated Entry (R1)	1	10/30/2018		10/30/2018	4957		Permanent housing (other ...	10/30/2018

Case Manager Assignments

4. Select **“Add New Current Living Situation”**

Current Living Situation

Current Living Situation History is listed below and new or edit existing.

1 result found.

Information Date	Enrollment	Current Living Situation
05/21/2021	09/09/2020 - My Fake Organization (ES- R10)	Emergency shelter, including hotel or motel paid for with emergency shelter voucher, or RHY-funded Host Home shelter

+ Add New Current Living Situation

5. Click on the “**Enrollment**” drop-down and select the corresponding **PATH** project.

The screenshot shows the ClientTrack interface for a client named Kermit Frog. The page title is '+ Current Living Situation'. Below the title, there is a section for 'Current Living Situation Information'. The form includes the following fields:

- Information Date: 05/27/2021
- Enrollment: -SELECT- (indicated by a red arrow)
- Current Living Situation: -SELECT-
- Location Detail: (empty text box)
- Record Contact:
- Restriction: Restrict to MOU/Info/Release

At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

6. Next, click on the “**Current Living Situation**” drop-down and select the Client’s current living situation from the drop-down list.

The screenshot shows the ClientTrack interface for the same client, Kermit Frog. The page title is '+ Current Living Situation'. The form is now populated with the following information:

- Information Date: 05/27/2021
- Enrollment: 08/04/2020 - In Fake Organization SSO (PATH#10)
- Current Living Situation: (Place not meant for habitation) (indicated by a red arrow)
- Location Detail: (empty text box)
- Record Contact:
- Restriction: Restrict to MOU/Info/Release

At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

7. Next, click the “Record Contact” checkbox

The screenshot shows the ClientTrack interface for a client named Kermit Frog. The page is titled '+ Current Living Situation'. At the top, there is a header with the client's name, social security number (312-92-111?), and client ID (3285). Below the header, there is a section for 'Current Living Situation Information'. The 'Current Living Situation' dropdown is set to 'Place not meant for habitation'. The 'Record Contact' checkbox is checked, and a red arrow points to it. Below this is the 'Contact Service Information' section, which includes a 'Contact Service' dropdown set to '- SELECT -', a 'Location' dropdown set to '- SELECT -', a 'Use Geolocation' checkbox, a 'Comments' text area, and a 'Restriction' section with radio buttons for 'Restrict to Organization' and 'Restrict to MDU/InfoRelease'. At the bottom right, there are 'Save' and 'Cancel' buttons.

8. Click on the “Contact Service” drop-down box and select the corresponding service.

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

The screenshot shows the ClientTrack interface for the same client. The 'Contact Service' dropdown is now set to 'PATH - Contact', and a red arrow points to it. The 'Record Contact' checkbox remains checked. The 'Save' button at the bottom right is now highlighted with a red box.

You have successfully updated the “Current Living Situation” with the required corresponding “Contact Service” for your PATH client.

If you need further assistance or have additional questions, please email the HMISHelpDesk@ihcda.in.gov