

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 ClientTrack application interface. On the left is a dark blue sidebar with navigation options: Client Dashboard, Find Client (highlighted with a red box), Intake, COVID-19 Intake, COVID-19 Vaccine Intake, Client Profile, Edit Client, Address History, Alias History, Case Managers, Case Notes, and Client Files. The main content area is titled 'Find Client' and contains a search form with the following fields: First Name, Last Name, Middle Name, Full Name (Last, First), Social Security Number, Birth Date, and Client ID. A search button is located at the bottom right of the form. At the top of the page, there is a header with the ClientTrack logo, a search bar, and user information for Lon Wood (Training) with links for Help and Sign Out. Below the header, a client profile for Kermit Frog is displayed, showing a Social Security Number of 312-92-111? and a Client ID of 3285.

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

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

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		XXXX-XX-1117	08/14/1982	3285

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

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 SSO (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

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.”**

The screenshot shows the ClientTrack interface for a client named Kermit Frog. The left sidebar has the 'Client Profile' menu item highlighted in red. Below it, the 'Living Situation' menu item is also highlighted in red. The main content area displays the client's information and a table of enrollments.

Client 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

Enrollments Table:

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 S20 (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

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

The screenshot shows the ClientTrack interface for the 'Current Living Situation' page. The 'Add New Current Living Situation' button is highlighted in red. The page displays a table with one row of data.

Current Living Situation Table:

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

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". The form contains 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/Inf/Release

Buttons for "Save" and "Cancel" are located at the bottom right of the form.

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 contains the following fields:

- 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/Inf/Release

Buttons for "Save" and "Cancel" are located at the bottom right of the form.

7. Next, click the “Record Contact” checkbox

The screenshot shows the ClientTrack interface for a client named Kermit Frog. The page title is '+ Current Living Situation'. The form contains the following fields:

- Information Date: 05/27/2021
- Enrollment: 08/04/2020 - My Fake Organization SSO (PATH#10)
- Current Living Situation: Place not meant for habitation
- Location Detail: [Text input field]
- Record Contact:
- Contact Service: - SELECT -
- Location: - SELECT -
- Use Geolocation:
- Comments: [Text input field]
- Restriction: Restrict to Organization, Restrict to MDU/InfoRelease

A red arrow points to the 'Record Contact' checkbox, which is checked.

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 a client named Kermit Frog. The page title is '+ Current Living Situation'. The form contains the following fields:

- Information Date: 05/27/2021
- Enrollment: 08/04/2020 - My Fake Organization SSO (PATH#10)
- Current Living Situation: Place not meant for habitation
- Location Detail: [Text input field]
- Record Contact:
- Contact Service: PATH - Contact
- Location: - SELECT -
- Use Geolocation:
- Comments: [Text input field]
- Restriction: Restrict to Organization, Restrict to MDU/InfoRelease

A red arrow points to the 'Contact Service' drop-down box, which is set to 'PATH - Contact'. The 'Save' button in the bottom right corner is 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