How to Guide

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

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 2022 HUD Data Standards Manual explaining the process.

"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 wellbeing 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 "Home" workspace in HMIS:
 - a. Click on the "Clients" icon and then the "Find Client" tab to search for an existing Client record in HMIS as shown in the image below.

X	Q Search	Clients / Client Deshboard	DB	¢ ₿
•	🕅 Client Dashboard	Luke Skywalker Social Security Number Client ID Client ID 1/1/2000 XXX-XX-0000 1048334		
	Q Find Client	Luke Skywalker's Dashboard		
- ~	17 COVID-19 Intake	Luke Skywalker's Information	ľ	
м	COVID-19 Vaccine Intake	Name: Skywalker, Luke Birth Date: 1/1/2000 Age: 22		
	> 🗀 Client Profile	Gender: Male Veteran: Data Not Collected		
	Common Client Assessments Other Assessments	Ethnicity: Data not collected Race: Data not collected		
	Client Enrollment and Client Services			
		Luke's Enrollments	ľ	

2. Once the Client is located, select the client to go to the "Client Dashboard" screen.

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Ē ☆	 Lintake COVID-19 Intake Client Profile Common Client Assessments Other Assessments Client Enrollment and Client Services 	Use the section criteria below to find your client.	To narrow the search. First N Last N Middle N Full Name (Last. Social Security Nu Birth Clie	fil in more than one ame: luk lame: sky irist}: bate: M4/DD/Y nt ID:	o criteria. Social Security	Number and Birth Da	te are the best fields to na	arrow your search.		Q, Search
		First Name Last Na Luke Skywal	ame	Middle Name	SSI	N X-XX-0000	Birth Dat 01/01/20	e 00	Client ID 👫	1048334
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ч	COVID-19 Vaccine Intake Client Profile Common Client Assessments Chier Assessments		Name: Skywa Gender: Male Ethnicity: Data n	ker, Luke ot collected	Birth	h Date: 1/1/2000 Race: Data not co	illected	Age: Veteran:	22 Data Not Collected	
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		Enrollment Description ~ Active	Case Members Pr	oject Start Date $\mathbb{I}^{\mathbb{Z}}_{\mathbb{A}}$	2 resurts to	Project Exit Date	Enroll Assessment ID Ex	xit Assessment ID	Exit Destination	Last Assessed
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		Coordinated Entry Coordinated Entry (R1)	1 11	/07/2022		11/07/2022	1971922	1971924	Data not collected	11/7/2022

Select the "Client Profile" tab located in the menu on the left side of the screen.
 a. Next, select "Living Situation."

X	Q Search	Clients / Client Dashboard	DB	4 8
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	12 COVID-19 Intake	Luke Skywalker's Information	Ľ	
☆	SOVID-19 Vaccine Intake	Name: Skywalker, Luke Birth Date: 1/1/2000 Age: 22		
	✓ ☐ Client Profile			
	💄 Edit Client	Gender: Male Veteran: Data Not Collected		
	S Address History	Ethnicity: Data not collected Race: Data not collected		
	Alias History			
	Case Managers	Luke's Enrollments	ľ	
	Case Notes			
	Client Files Eamily Mombars	2 results found.		
	Interested Others	Enroliment		
	A Living Situation	Description Case Members Project Start Date 1: Housing Move-In Date Project Exit Date 1: Enroll Assessment ID Exit Assessment ID Exit Destination La	ist Assesse	ed
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	Client Photo	✓ PT - Report Re-Housing Mr. Ealer Organization Coll DDH (DDH DR) 1 11/07/0022 1971973 11/07/0022	1/7/2022	
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	> 🗅 Other Assessments	nn oonninnaa miryyny i manaze i Hallozz 1971222 1971224 Odd Hololaddau H	1112922	
	Client Enrollment and Client Services			

4. Select "Add New Current Living Situation"

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	 Address History Alias History 	C 🕯	11/07/2022	11/07/2022 - 11/07/2022 - Coordinated Entry (R1)	Data not collected
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	Case Notes				
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	Client Enrollment and Client Services				

5. Click on the "Enrollment" drop-down and select the corresponding PATH project.

X	Q Search	Clients / ClientTrack Form / ClientTrack Form
*	Client Dashboard Q Find Client	Luke Skywalker Social Security Number Client ID 1048334 4 🗎 🗅 🗎 Client Living Situation 4 🗎 6
ិ ជ	 COVID-19 Intake ✓ COVID-19 Vaccine Intake 	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:* 11/09/2022
	✓ Client Profile ▲ Edit Client ▲ Address History	Enrollment.* SELECT
	Alias History Case Managers Case Notes	Current Living Situation: * SELECT Location Detail:
	Client Files Family Members Interested Others	Record Contact:
	Living Situation Notifications Client Photo Veteran Information Paused Workflows	

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

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*	Client Dashboard Q Find Client	Luke Skywalker Social Security Number Client ID 1//2200 XXX-XX-0000 1048334	D	< 0
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	Case Notes	Barrord Contact-		
	Family Members Interested Others Living Situation	August d'autores.		
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	Veteran Information Paused Workflows			

7. Next, click the "**Record Contact**" checkbox

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~	Client Profile	Enrollment.* 11/07/2022 - My Fake Organization CoC RRH (RRH-RB) 🐱	
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	Interested Others		
	A Living Situation	Contact Service Information	
	D Notifications	Contact Service:* SELECT V	
	Client Photo	Location	
	Le Veteran Information	LONGTON UNDER CONTRACT OF	
	13 Paused Workflows	Use Geolocation:	
>	Common Client Assessments	Comments:	
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	Client Enrollment and Client Services		

- 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.

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۲	D Client Dashboard	Luke Skywalker Social Security Number Client ID 1/1/2000 XXX-XX-00000 1048334	
E	Q Find Client	Current Living Situation	< 🕀
	t ⊒, Intake		
	1 COVID-19 Intake	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.	
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	✓ ☐ Client Profile		
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	Case Managers	Location Detail:	
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	Client Photo	Location: SELECT	
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	Services		
0		● Save	Cancel

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 <u>HMISHelpDesk@ihcda.in.gov</u>