Stanislaus County Community System of Care

HMIS User Data Entry Manual

A guide to navigating ClientTrack v.24, a web-based case management tool, including entering basic client information, fixing common data entry errors, and running reports.

Adopted: April 1, 2017

Amended: December 2024

http://www.csa-stanislaus.com/hmis/index.html

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Introduction

Objectives

The content in this User Data Entry Manual will provide information on basic features of ClientTrack and guidance on day-to-day data entry.

In this manual, the following information will be reviewed:

- Basic Navigation of ClientTrack
- Entering Client Information and Managing Project Enrollments, including Coordinated Entry
- Basic Reports
- Submitting an Issue Ticket

Disclaimer

This guide does not exhaustively cover all uses and features of Stanislaus County HMIS ClientTrack. For questions beyond what is included in this guide, please refer to Eccovia University as an additional resource. You may also reach out to <u>HMIS@stancounty.com</u> if you have additional questions. All screenshots recorded in this document are comprised of fabricated client data.

Important Information

HMIS Help Desk: If you come across any issues within ClientTrack at any time, please contact the HMIS Help Desk at <u>HMIS@stancounty.com</u>. Please do not send any client personally identifiable information when emailing the Help Desk. Please use the ClientTrack Client ID number when emailing the Help Desk, if applicable.

If you do not see an assessment in the workflow that you are expecting to see, please reach out to <u>HMIS@stancounty.com</u> or submit an issue ticket immediately. There may be issues within the system that need to be addressed.

Make sure you have a signed HMIS ROI (Release of Information) from the client before entering their information into HMIS.

HUD HMIS Resources

HMIS Data Standards Resource Page

FY 2024 HMIS Data Dictionary

FY 2024 HMIS Data Standards Manual

HMIS Standard Reporting Terminology Glossary

Basic Navigation

HMIS Navigation Icons

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P	Home	?	Help	Q	Search Records
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11	Expand/Collapse	ð	Minimized Windows	☆	Favorites
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	Pause Workflow	×	Cancel/Remove	5	Undo Changes
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Save & Close	Save & Close (save and move to the next screen)				

Log into ClientTrack

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Apply

- 1. Passwords are case sensitive
- 2. Never let your internet browser store your login or Password
- 3. Remember: Sharing your Username and password is NOT PERMITTED!



	Sign in to Modesto
www.clienttrack.e	ccovia.com/login/modesto
www.enenterdek.e	Password
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Home Dashboard

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	Administration	HMIS Administrator: Lyanell Fuller (200) 558-3876, Email: Help Information: Use the Help Topics link or contact the HMIS Administrati			
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Home Dashboard: This is your "Home Workspace" as a user. Here you can view information specific to you like your user configuration, case assignments and current program enrollments. Select User Dashboard to return to the screen shown above.

Settings: This will have your initials in a circle. Use this to switch organizations or workgroups, change your theme, or clear your preferences. It is important you ensure you are in the right organization before editing any data.

My ClientTrack: This will be where you can view the Coordinated Entry by Name List (BNL), change your passwords, view your paused operations, add quick services to multiple clients, and view any submitted issue tickets.

Toggle Menu Button: Use this if you are unable to see explanations for icons or would like to collapse the menu.

Client Dashboard Options

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

Client Dashboard: This is your "Client Workspace" as a user. Here you can view information specific to clients such as their current and past enrollments from your organization, demographics, and assessments.

Intake: Use this to start the workflow for all enrollments regardless of the funding source (CoC, ESG, RRH, HP, SSVF, RHY, and PATH). Once selected, it will ask if you would like to use the current client listed on your dashboard or a new client.

Profile: Use this drop-down menu to update client demographics using edit client, add a case note, update a current living situation, and more.

Common Assessments: Use this drop-down menu to access some common assessments collected in enrollments including, Domestic Violence, Barriers, Universal Data, Financial, and more.

Other Assessments: Use this drop-down menu to access assessments such as Housing Assessment disposition at Exit, Well-Being Assessment, and more.

Enrollment and Services: Use this drop-down menu to access Enrollments, Referrals, Services, Quick Services, and more.

RHY Assessments: Use this drop-down menu to access RHY associated assessments including Entry Assessment, BCP Assessment, Aftercare, and more.

SPDAT Assessments: Use this drop-down menu to access recorded VISPDATs for the client.

Coordinated Access: Use this drop-down menu to view if the client has been enrolled in Coordinated Entry or any other organization that participates in HMIS. This tab can be utilized for care coordination, exit destination information, and other information.

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the state of	Page aspaîlnine atop#	Date	Service	Units		Organization		Service Creation Time			

Client Dashboard – Client Record

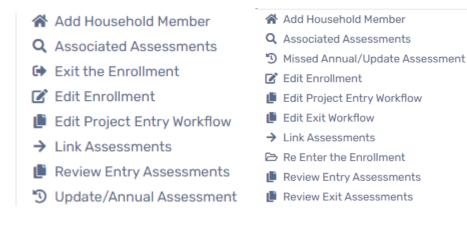
Client ID: ClientTrack's identifier of each client. This number can be used as an identifier instead of using Personally Idenfitable Information such as, Client Name, DOB, Age, Gender, or SSN.

Client Demographic Information: Shows the Client Name, DOB, Age, Gender, Ethnicity, and Race.

Program Enrollments: Shows the Enrollment Description (Program you enrolled the client in), How many case members are enrolled, Project Start Date, Housing Move-In Date (if applicable), Program Exit Date, Case ID, EnrollID, Number of Days Enrolled, Exit Destination, Organization, Last Assessment Completed, and Program Type.

Services: Any Referrals or Services provided to the client.

Action Button Functions



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.

Associated Assessments: This feature will bring up the assessments that have been linked to this Enrollment. The type of record and Assessment link type can be used to determine how they are linked to these other records.

Missed Annual/Update Assessment: This feature allows a user to enter a missed Annual/Update Assessment after a client has been exited from an enrollment. If you have missed a window for an Annual Update, adding a Missed Annual Assessment will not remove this data quality error. **Note:** This function will only show after a client has exited.

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

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

Edit Project Entry Workflow: Only use this to correct any data entry errors, as this will change the baseline data.

Edit Exit Workflow: Only use this to correct any data entry errors, as this will change the baseline data. This includes updating the destination if additional information is gathered. **Note:** This function will only show after a client has exited.

Re-Enter the Enrollment: Use this feature to re-enroll a client who was accidentally exited or for Outreach clients who return prior to 90 days, this option should be used sparingly and is only allowed in certain circumstances. If you utilize this feature, please reach out to <u>HMIS@stancounty.com</u> so we can remove any assessments associated with the exit. **Note:** This function will only show after a client has exited.

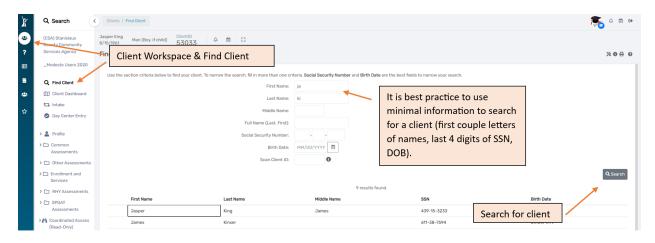
Review Entry Assessments: Use this feature to review all the details from the enrollment's entry assessment. This includes general details (date, enrollment name, type of assessment, and user who created the assessment)

as well as links to review completed assessments for the enrollment including (RHY and PSH) RHY Entry Assessment, HMIS Universal Data, HMIS Barriers, Domestic Violence, and Financial.

Review Exit Assessments: Use this feature to review all the details from the enrollment's exit assessment. This includes general details (date, enrollment name, type of assessment, and user who created the assessment) as well as links to review completed assessments for the enrollment including HMIS Universal Data, Housing Assessment Disposition at Exit, HMIS Barriers, and Financial. **Note:** This feature will only show when the client has been exited.

Update/Annual Assessment: Use the Update/Annual Assessment to conduct annual assessments or capture changes to client's status since enrollment. You will also use this workflow to update an enrollment with a Move-In Date (RRH projects) and Engagement Date/PATH Enrolled Status (Street Outreach/PATH projects). **Note:** This feature will only show when a client is still enrolled in the project.

Search For a Client



- 1. Navigate to the Client Workspace.
- 2. Select Find Client.
- 3. It is best practice to use minimal information to search for a client (remember "less is best"). Once you enter how you would like to search, select Search. The system will provide you a list of matching names to the information you have searched.
- 4. If the correct client does not appear, you can search using another method to ensure the client is not currently in HMIS.

Enter Client Information and Manage Project Enrollments

Start an Intake

Navigate to the Client Workspace and select Intake.

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Client Dashboard	STANISLAUS TEST			
Day Center Entry	Name: King, Jasper Junnes II Birth Date: 8/15/1961		Age: 62	
> 💄 Profile > 🗅 Common Assessments	Gender: Man (Bay), If child) Client ID: 53033 Recr. Asian or Asian American, Black, African American, or African			
Other Assessments D Enrollment and				
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Select the appropriate option to continue with the Intake.

Intake 2024 (2322/1B589) Add or Edit Basic Client Information Family Members Program Enrollment Yause × Cancel Man (Boy, in the first sector of the firs	t if their name is in the header	New Client if they were not found arch
		+ Add a new client
	Add or Edit Do you want to add a new client or use the selected client?	Use the current client
	Select Another Client to find another client	Q Select another client

If you select Add a New Client. You will be prompted to enter First Name, Last Name, Social Security Number, and Birthdate. The system will provide an additional warning if it detects any potential duplicates. Verify your client's information does not match an existing client. If the name does not match, select Next. If the correct client appears, select the name of the client.

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2 ?	(CSA) Stanislaus County Community Services Agency _Modesto Users 2020	(2322/1B589) Basic Client Information Search Existing Clients	Client Information Please address the following:	el duplicates. Click Next if this is not a dup	licate.	heck for potential duplicates!	< 8
8	Q Find Client	Basic Client Information	Search Existing Clients 0				
	17 Intake	O Program Enrollment		rch existing client records for possible matches	to avoid duplicate entry. Enter partial identifying info	ormation on the client, and then click Next to search from existing client records.	
☆	Day Center Entry	Pause × Cancel	 If the system finds no potential matches, If the system finds potential matches, the	you will be taken directly to Step 2.	te match appears, select and open that existing clier		
	> 💄 Profile			First Name:	Jasper		
	Common Assessments			Last Name:	King		
	> 🗅 Other Assessments			Social Security Number:			
	> 🗅 Enrollment and Services			Birth Date:	MM/DD/YYYY		
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	Coordinated Access (Read-Only)			v			
Ø							» Next

Workflow To Add a New Client

Adding a new client in HMIS requires Basic Client Information to be recorded.

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	_Modesto Users 2020	
8	Q. Find Client III Client Dashboard 12. Intake III Day Center Entry > 2. Profile > Common Assessments > III Other Assessments > III Other Assessments	Basic Client Information C Complete the client's identifying information. Name and social security number have associated data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected than ClientTrack automatically records that full data quality was met. First Name.* Suffix: U Name Quality.* Social Security Number: 30° 16° 2323 0
	> 🗅 RHY Assessments	Basic Client Demographics
	> 🗅 SPDAT Assessments	Birth Date.* 08/15/1961 🗒
	in Coordinated Access (Read-Only)	Client Age: 65 Client Age: 67 Clien
		Additional Race and Ethnicity Detail: Additional Race and Ethnicity Detail:
0		Cancel

First Name, Middle, and Last Names: Do not add nicknames (this can be recorded in the Alias History section). Use Basic English Grammar; do not use all lower- or upper-case letters. Do not add special characters such as quotes or hyphens because it causes problems when searching the client. Include middle names or middle initials as it helps identify possible duplicates in the system.

Social Security Number (SSN): If the client doesn't know or refuses to provide their SSN, DO NOT enter a fake social security number. Select the data quality option that best reflects the client's response and leave the area blank where numbers would have been entered. SSNs that do not adhere to Security Administration Rules will cause data quality errors.

Date of Birth (DOB): If the client cannot remember their birth year, it may be estimated by asking the person's age and calculating the approximate year of birth. If a client cannot remember the month or day of birth, record an approximate date of '01' for month and '01' for day. For *'DOB Data Quality'*, select "Approximate or partial DOB reported." If a client is not able to estimate their age within one year of their actual age, select "Client doesn't know". If the client can provide their birth year but declines to provide their day of birth and month, record an approximate date as indicated above and indicate that the response is "Approximate or partial DOB reported"

Race and Ethnicity: Record the self-identified race(s) and ethnicity, if applicable, of each client served.

Additional Race and Ethnicity Detail: This element is an open text box field for clients to report any additional race or ethnicity information they wish to share. For example, a person may identify as "Hispanic/Latina/e/o" based on the response options provided, but more specifically identifies as Puerto Rican.

(CSA) Stanislaus County Community	Jasper King ClientID			
Services Agency	Client Information			< 0
_Modesto Users 2020 Q. Find Client III Client Dashboard 13 Intake ⊘ Day Center Entry > 2 Profile	Gender:* Veteran Status;* Veteran Assistance Verification: Mailion Address and Contact Information	Woman (Girl, if child) Man (Boy, if child) Culturally Specific I Transgender Non No SELECT) dentity (e.g., Two-Spirit)	
Common Assessments Other Assessments Enrollment and Services	Enter the address where the client is currently able to receive mail.	shelter, transitional ho 320 9th St.	using, client residence.	
RHY Assessments D SPDAT Assessments M Coordinated Access (Read-Only)	City, State, Zip Code: Email: Main Phone: Message Phone:	209-401-5006	CA 95354	
	Family Information Use this section to collect data about a client's family. The Family search field allows you to see Family: Relationship to Head of Household: * Begin Date: End Date:	King, Jasper - 1961 Self 07/26/2024	kisting family account. This is	appropriate when adding a family member to an existing family.
>	Client Dashboard Client Dashboard Dav Center Entry Client Assessments Client Assessments Client Assessments Client Assessments Client Assessments Client Assessments Client Assessments Assessments Assessments Assessments Assessments Assessments Client Assessments Client	Client Bashboard Lance	Initial mathematical control of the address and contact information Transport Initial control of the address where the clent is currently able to neave mail. Mailing Address and Contact Information Initial control of the address where the clent is currently able to neave mail. Mailing Address includes, but not limited to, service organizations, access centers, emergency shelter, transitional ho Services Initial control of the address where the clent is currently able to neave mail. Mailing Address includes, but not limited to, service organizations, access centers, emergency shelter, transitional ho Services Initial control of the address includes, but not limited to, service organizations, access centers, emergency shelter, transitional ho Address is gradients. S20 9th St. Initial control of the address includes, but not limited to, service organizations, access centers, emergency shelter, transitional ho Address is gradients. Moderso in Clenter Emergency shelter, transitional ho Address is gradients. Initial control of the address includes, but not limited to, service organizations, access centers, emergency shelter, transitional ho Address is gradients. S20 9th St. Initial control of the address includes, but not limited to, service organizations, access centers, emergency shelter, transitional ho Address is gradients. S20 9th St. Initial control of the address includes to access the service organizations. Emergency is gradients. S20 9th St. Initial control of the address includes to aclent's family the family search field allows	Install Transporter Initials Initials Initials Initials Day Center Entry Veteran Assistance Verification: Initials Initials Initials Veteran Assistance Verification: Initials Initials Day Center Entry Veteran Assistance Verification: Initials Initials Initis Initis <

Gender: Record the self-reported gender(s) of each client served.

Veteran Status: Select the appropriate response as reported by the client, required for 18 years or older.

Veteran Assistance Verification: This field is unable to be edited by the user, however, can help provide verified information on whether the client is eligible for Veteran Assistance.

Pregnancy Status: This element will only appear if the gender selected is Woman (Girl, if child). This element must be selected for RHY funded Projects.

Mailing Address and Contact Information: This information can be utilized by other agencies to contact clients who may be eligible for other services. It is important to update their information.

Relationship to Head of Household: When entering the first client in the household, the system will default to "Self". It is imperative this information is entered correctly for ALL household members. Otherwise, your reports will not accurately reflect the clients and household make-up. There can only be one Self in each household.

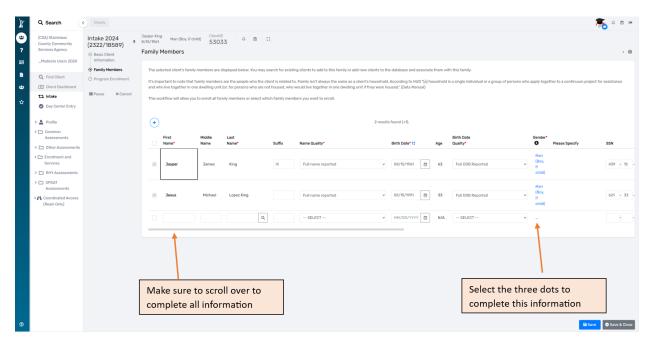
Begin Date: Change to the date that is on the new signed ROI from the client for enrollment.

Add Household Members

During Enrollment Process

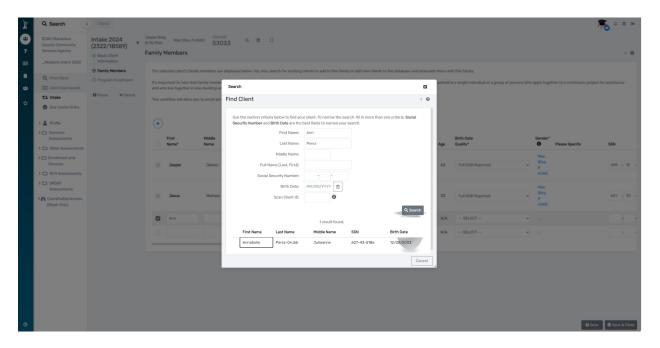
You may need to add additional household members to an enrollment. Once you complete or check the Basic Client Information screen on your enrollment, you will move to the Family Members screen. On this screen, you can add additional household members. **Note:** This screen will only allow you to add the household member and does not attach household members to an enrollment. This will be completed on the next screen, Program Enrollment.

Select the check box next to the empty text boxes under the last listed household member. Insert all relevant information to the new household member. **Note:** Make sure you scroll all the way to the right to add all the information. **Note:** Gender and Race/Ethnicity have three dots to indicate missing information. Select the three dots to record each category.

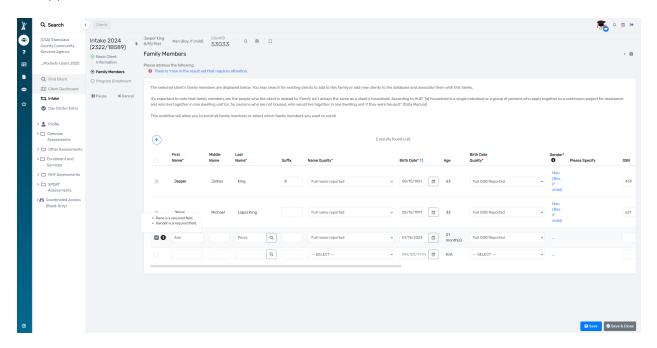


The system will automatically conduct a search for the new household member after you enter the first and last name. If the new household member is already in the system, click on the appropriate name in the search list that appears in the new window to attach the existing client record to the household.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

is a new client, click on Cancel in the search window and proceed entering the new household member's information.



Once all information is completed, select Save & Close. If you receive an error message, you will see an exclamation mark next to the row that requires your attention. Hover over the exclamation mark to view the issue(s).



Existing Enrollment

If you need to add a household member to an enrollment, you will begin on the Head of Household's Client Dashboard and select the action button. Select Add Household Member.

County Community	Janger King Man (Boy, if child) Clentb Q B 1		
Services Agency	A/15/Peg 4 Man (189), 4 chall 53033 4 11 11		
_Modesto Users 2020	Jasper King's Dashboard		
-House and a solo	Jasper King's Information		1
Q Find Client			
II Client Dashboard			
ta Intake	STANISLAUS TEST		
Day Center Entry	Name King Japper James III Birth Date 6/15/11951		Qe.
Profile	Gender: Man (Boy, if child)		
Common Assessments	Client ID 53033 Race Asian or Asian American, Black African American, or African		
Other Assessments	Cuertri Li 5333 Riske Asian Prancian, Back, American, or American, or American, Back, American, Back, American		
Enrollment and			
Services	Jasper's Errollments		
RHY Assessments			
C SPDAT Assessments	Tresult found.		
Coordinated Access		Last Assessed	Prog
(Read-Only)	× Adhe		
	V Energancy Shelter - Entry Exit		
	CSATESTES 1 Household without Childer 091142024 94515 132107 2 ICSAI Standaus County Community Services Agency I	8/14/2024	0
	Q. Associated Assessments		
	Q Associated Assessments For the Envolvement So are of the Envolvement So are of the Envolvement		
	bit the Einsteinent Jac 27 Edit Einsteinent Git Child Einsteinent Git Child Einsteinent		
	6 Exit the Envolument 3a 65 Exit Envolument 8 EXIT Envolument Exit Assessments 9 Exit Assessments transit found.		
	Image: Set the Envolument Image: I		

Enter or search for a client to add to the household. Remember to scroll to the right to add a relationship to the head of household.

x	Q Search	Clients / Jasper King's D	braddhaa												۰	0 0 0
۲ ۲	(CSA) Stanislaus Dounty Community Services Agency	Add Family Member	Jasper Ki 8/15/196 Family	Man (Boy	(if child) Client		0									< 0
	_Modesto Users 2020	Members														
		O Enrollment	The s	elected client's f	amily members are	displayed below, You i	may search for exi	isting clients to add to this family or a	idd new clients to t	he database and assoc	iate them w	ith this family.				
	Q Find Client		It's in	portant to note	that family member	rs are the people who t	the client is related	d to. Family isn't always the same as	a client's household	I. According to HUD "[a	household	is a single individual or a group of p	persons who a	apply together to a c	ontinuum project for assi	stance
٠	D Client Dashboard	III Pause X Cancel	and w	vha live together	in one dwelling uni	t (or, for persons who a	are not housed, wh	ho would live together in one dwelling	g unit if they were h	oused." (Data Manual)						
☆	13 Intake		This v	workflow will allo	w you to enroll all fa	mily members or selec	ct which family me	embers you want to enroll.								
w	Day Center Entry															
	> 🚊 Profile		Ŧ)					2 result	ts found (+1).						
	Common Assessments			First	Middle	Last						Birth Date		Gender*		
	> C1 Other Assessments			Name*	Name	Name*	Suffix	Name Quality*		Birth Date* 11	Age	Quality*		O Please S	specify SS	iN
	> Enrollment and Services			Jasper	James	King		Full name reported	0	08/15/1961 首	1 63	Full DOB Reported	÷	Man (Boy.	D	139 - 15 -
	> C RHY Assessments		10	Jasper	James	ung		Put name reported		00/10/1901	1 03	Foil DOD Reported		if child)		104 - 10 -
	> C SPDAT															
	Assessments										-			Man [Boy.		
	> A Coordinated Access			Jesus	Michael	Lopez King		Full name reported	~	05/15/1991 岔	33	Full DOB Reported	*	if .	6	21 - 33 -
	(Read-Only)													child)		
							Q	SELECT		MM/DD/YYYY	N/A	SELECT	~			141 4
			_													
							T									
				Se	lect the	magnifie	d glass	to search for a	n							
				ov	isting cli	iont										
				ex	isting ci	ient.									-	_
0															El Save 🔘	Save & Close

Once you save and close, you will go to the Enrollment Screen. Add this individual to the current enrollment and select Save.

Q, Search	Cients									1	0
(CSA) Stanisleus County Community Services Agency _Modesto Users 2020	Add Family Member © Review Family Members		entititi 5033 A M D								
	Enrollment	Select the Project you are enrolling t ClientTrack will display a list of client									
Q Find Client	III Pause X Cancel	Please select all the clients you are e									
Intake Day Center Entry Profile Common Assessments		For Emergency Shelters - it is without 'suiting and restarting For Safe Havene and Transition For all types of Permanent Hou 1. Information provided by documentation may not 2. The client has indicated	It is the date of first contact with the client, the night the client first stayed in the shelter (for each stay for a specified pariod. 48 Housing - It is the to date the client moves is aling , including Rapid Re-Housing – It is the the client or from the referral indicates they yet have been gathered they want to be housed in this pariject as services and housing through the project	nto the residential date following app meet the criteria f	I project (i.e. first night in re plication that the client was for admission (for example i is the project has a housing	idence). admitted into the project. To be ad obronic homelessness is required opening (on-site, site-based, scal	mitted indicates the following fa the client indicates they have a ttered-site subsidy) or expects t	ctors have been mi serious disability ar s have one in a reas	et: nd have been homeless lon conably short amount of Sin	ng enough to qual Tre	ify – tha
Other Assessments Enrolment and			rojects including but not limited to: services	only, day shelter, t	nometesaness prevention, c	on underer also someric reality se					isiqii o
Enrollment and Services		 For all other types of Service p 	rojects including but not limited to: services		CSA TEST ES	anan ann an teoraid an the sing ann an sua					ision o
Enrollment and Services RHY Assessments		 For all other types of Service p 	rojects including but not limited to: services			den um reinen disberdam kenn, i neder in se					ision o
Enrollment and Services		 For all other types of Service p 	rejects including but not limited to: services								194041 0
Enrollment and Services RHY Assessments SPDAT		 For all other types of Service p service. Household 	regette linduding but not limited to services In Manual "A household is a single individual o Dender	Project:*	CSA TEST ES 🚺				rsons who are not housed, Relationship to Head of Househol		
Enrollment and Services RHY Assessments SPDAT Assessments Coordinated Access		For all other types of Service p service. Household Excerpt from the IMMS Data Standard develop unit If they were housed)?	te Manuel"A heusehold is a single individual e	Project:*) or a group of perso	CSA TEST ES O	continuum project for assistance a	and who live together in one dwe		Relationship to		
Enrollment and Services RHY Assessments SPDAT Assessments Coordinated Access		For all other types of Service p service. Household Liceopy From the HMS Data Standard dealing until they ware housed): Name	te Manuel "A household is a single individual o Gender Man (Boy, if child)	Project:* : or a group of perso Age	CSA TEST ES ① ans who apply together to a Project Start Date	continuum project for assistance : Exit Date	and who live together in one dee Case Manager O	ding unit (or, for pe	Relationship to Head of Househol	в.	

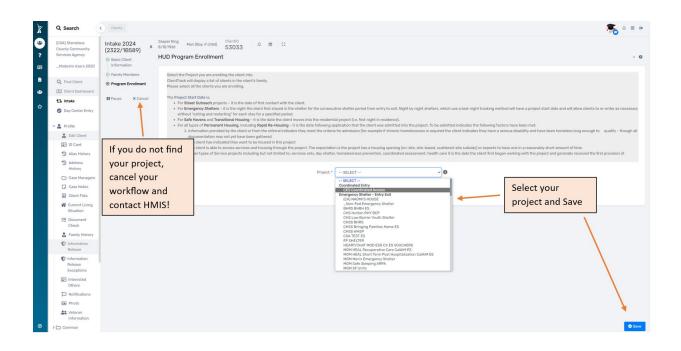
Once you Save, the Entry Project Workflow will appear for the added Household Member. Complete all information to enroll this individual.

X	Q Search	Clients		🕵 4 🖻 👳
æ ?	(CSA) Stanislaus County Community Services Agency	Member Review Family	Senus Lopez King Man (Boy, If child) CilientID 53376 A ■ C Sr/Sr/991 Universal Data Assessment (FY24)	< 0
프 총 ☆	Modeta Users 2020 Generation Generation Generation Control Contro Contro	Hembers Concentent Michael Concentent Michael Concentents Michael Concentents Michael Concentents Michael Concentents Michael Concentents Michael Concentents Michael Concentents Michael Concentents Michael Concentents Michael Michae	Compete 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 3.91 any project satup data or missing required data links. Default Client's Last Assessment Data: Output: Default Client's Last Assessment Data: Output: Default Client's Last Assessment Data: Default Client's Last Assessment	7 data. Changing
	> 🗅 SPDAT Assessments		Living Sicuation Living Sicuation Living Sicuation Living Sicuation Prior Living Sicuation Hospital or other residencial non-psychiatric medical facility	
	(Read-Only)		Length of stay in pitro living situation Approximate date this episode of homelessness started. Approximate date this episode of homelessness started. Approximate date this episode of homelessness started. Begardiess of where they stayed last rightlivenba of times the client tas been on the stretce. In ES, or BH in the past three years : De month (this time is the first month) 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. Yea	
Ø				Save

Project Enrollment

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

Select the drop-down menu to select your project. **Note:** You will only see the options in the drop-down list that your organization has access to or what programs they are set up for. If you do not find your program option when enrolling a client, cancel your workflow and contact HMIS. DO NOT continue. If your project is listed, select the project, and select Save.



Select the box on the left for each household member you wish to enroll in the project selected on the previous page. **Note:** The Project Start Date will default to the current date. Make sure you change the date if their Project Start Date is not the current date. Select Save when finished.

< Clients												🕵 4 🗎 🛛
Intake 2024 (2322/1B589) Basic Client Information	Jasper King 8/15/1961 HUD Pro	Man (Boy, if chi	53033	4 🗎 🖸								< @
 Family Members Program Enrollment 	ClientT	the Project you are (frack will display a lis select all the clients	t of clients in the cli									
II Pause X Cancel	Ma	For Emergency Shelt without "exiting and For Safe Havens and For all types of Perm 1. Information or rk the ch	ters – it is the night : restarting" for each Transitional Housin anent Housing, inclu- ovided by the client	stay for a specified period. g - it is the date the client moves i using Rapid Re-Housing - it is the or from the referral indicates they es for	into the resident date following a meet the criteri t. The expectatio	tial project (i.e. first night in n application that the client was ia for admission (for example on is the project has a housin	ry to exit. Night by night shelters, w esidence). a admitted into the project. To be a if chronic homelessness is requirer ng opening (on-site, site-based, sca coordinated assessment, health ca	dmitted indicates the following fa d the client indicates they have a ittered-site subsidy) or expects to	ctors have been m serious disability a b have one in a rea	net: and have been homeless long sonably short amount of time	enough to	qualify – though all
	wou	uld like t	o enroll	in your	Project:*	CES Coordinated Access	v	0				
	pro	ject.										
		<i>t from the HMIS Data</i> g unit if they were ho		A household is a single individual	or a group of per	rsons who apply together to	a continuum project for assistance	and who live together in one dwe	lling unit (or, for pe	ersons who are not housed, w	ho would live	e together in one
		Name		Gender	Age	Project Start Date	Exit Date	Case Manager		Relationship to Head of Household*		
		King, Jasper Ja	imes III	Man (Boy, if child)	63	10/24/2024	MM/DD/YYYY	Stephanie Hand	Q	Self	~	c
		Lopez King, Jes	sus Michael	Man (Boy, if child)	33	MM/DD/YYYY	MM/DD/YYYY		Q	SELECT	*	
								ect start date v as today's dat			t	
								different date to the informa		-	s is	Save

HMIS Universal Data Assessment

The Universal Data Assessment information is related to a client's housing status and helps calculate their chronicity of homelessness.

Universal Data Assessment (FY24)		
Complete the information below related to the selected client's housing status and other relevant any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may	information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Asses not always show as expected because of changed setup data or missing required data links Default Client's Last Assessment	sment
Assessment Date: •	08/14/2024 📋	
Age at Assessment:	33	
Assessment Type: *	Entry 🖌	
Assessor:*	Stephanie Hand Q	
Program:	CSA TEST ES	
Disabling Condition:*	Yes 🗸	
Living Situation Identify the type of residence and length of stay at that residence just prior to (i.e., the night befor	re) program admission.	
Prior Living Situation:*	Hospital or other residential non-psychiatric medical facility 🗸 0	
Length of stay in prior living situation:*	Two to six nights 🗸	
Approximate date this episode of homelessness started: *	08/01/2024	
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:	One time v	
Total number of months homeless on the street, in ES, or SH in the past three years :*	One month (this time is the first month) 🐱	

Date: Will default to the date of entry and will need to be changed if the information date is different.

Disabling Condition: There is only one recorded disabling condition per enrollment. The answer should always reflect the most current disabling condition available.

Enrollment CoC: This element will auto populate to CA-510 Turlock/Modesto/Stanislaus County CoC.

Prior Living Situation: This section has conditional questions depending on the project the client is entering, and the responses provided.

Health Insurance

Record the client's health insurance status. **Note:** if you mark Yes to Covered by Health Insurance, you need to have a type of health insurance recorded. More than one health insurance may be selected.

Health In Please ind		not the client is covered by health insurance. If so, yo	u will be able to record I	health insura	ance sources for the clier	nt.	
Selecting	1	Covered by Health Insurance:	Default La Yes 🗸	ist Insurance	e Status		
the box		Туре	Status		Reason No 🕕		Other Coverage
will auto select No		Private Pay Health Insurance	No	~	SELECT	~	5
for every		Medicare	No	~	SELECT	~	c
response		Medicaid	No	~	SELECT	~	c
	1	State Children's Health Insurance Program S-CHI	P No	~	SELECT	~	c
		Veteran's Administration (VA) Medical Services	No	~	SELECT	~	c
		Employer-Provided Health	No	~	SELECT	~	c
		Health Insurance obtained through COBRA	No	~	SELECT	~	c
		Other Public	No	~	SELECT	~	ວ
		State Funded Insurance for Adults (Medical)	Yes	~			ວ
			-				-

Barriers Assessment

Record each individual barrier for the client. The client's last assessment may be displayed as a default. If the client has recorded barriers, select Yes from the drop-down menu for the recorded barrier. **Note:** For Developmental Disability and HIV/AIDS, there will not be a drop-down for "Condition is Indefinite" as this is not a required field per the HMIS Data Standards.

Keep in mind, if the client has a barrier which is Indefinite, they must have a disabling condition marked yes. The disabling condition cannot be edited on this screen. Complete the entire workflow before returning to Edit Project Workflow to correct the issue.

this form to	o identify whether a client has each individua	I barrier or not. The	Clients last assessment is o	lisplayed as a	default. You ma	y, optionally, click Previ	ous Barriers Detail to view infor	mation about the defaulted rec	ords or click View		s. • View Barrier His
	ng the box will auto s every response	elect	Identified Date:	08/14/20	24 🟥	Assessment Acti	ve			An explanation car	
/			Screen: Disabling Condition:	Special N Yes		~				entered but is not required	
	Barrier 1ª	Help	Barrier Present?*			Condition is Indefinite		Explanation		Previous Barrier Details	
ß	Alcohol Use Disorder	۲	No	*				_	×	 Previous Barrier 	5
ß	Chronic Health Condition	۲	No	~	lf a ba	arrier is inc	lefinite,			Previous Barrier	c
B,	Developmental Disability	۲	Yes	*		-	ion must be			Previous Barrier	0
B,	Drug Use Disorder	۲	No	•	mark	ed Yes				 Previous Barrier 	c
B,	HIV/AIDS	۲	No	v		4				✓ Previous Barrier	0
ľ	Mental Health Disorder	٢	Yes	•		Yes	~			Previous Barrier	5
ß	Physical Disability	۲	No							Previous Barrier	c

Domestic Violence Assessment

Record the client's response to domestic violence experience. **Note:** If domestic violence is reported and you select Yes for Domestic Violence Experience, you will be prompted for more information. Domestic violence service providers, like Healthy Alternative to Violent Environment (HAVEN), are prohibited from entering client data into HMIS.

Domestic Violence Assessment	
If the client is a survivor of domestic violence, select Yes for Survivor of Domestic Violence, and select when th	e experience occurred.
	Assessment Active
Assessment Date:*	08/14/2024 📾
Survivor of Domestic Violence:	• Yes
	○ No
	Client Doesn't Know
	Client prefers not to answer
	O Data Not Collected
The questions will auto populate if Yes is selected.	Within the past three months $$ ~
Currently Fleeing: *	Yes 🗸

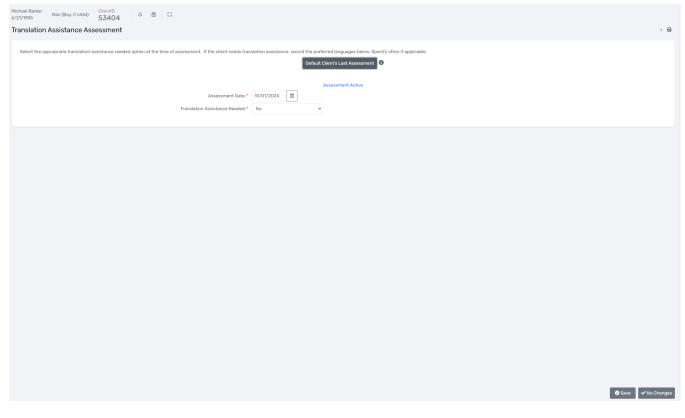
Financial Assessment

Record the client's monthly income. When the client does not know the exact amount, you can help the client estimate the amount. Income received by children under 18 years of age, should be entered under the Head of Household's Financial Assessment. **Note:** If Yes is selected for either source of income, an amount must be entered. If an income is selected by mistake, please contact HMIS to remove the record. You may need to scroll down on the screen to view Non-Case Benefits from Any Source.

		Assessment Active			
	v if Yes is selected		If selected, an	1	
	1981	Description	amount must be recorded!	Monthly Amount	
۵	Earned Income			\$1200.00	þ
	Unemployment insurance				
۵	Social Security Insurance				c
	Supplemental Security Income				
۵	Social Security Disability Income	Tommy \$300		\$300.00	c
	Private Disability Insurance				
	Worker's Compensation				
	VA Service-Connected Disability Compensation		A description of the income		
	VA Non-Service-Connected Disability Pension		can be added but is not		
	Pension or retirement income from a previous job				
	TANF		required. Can be used to		
	General Assistance No Financial Resources should		describe children's income		
	Retirement (Bocial Security) not be selected if Yes for				
	child Support income is selected				
	Almony				
	OtherIncome				
	No Financial Resources				

Translation Assistance

Complete the required information.



Universal Data Assessment for Child

Complete the required data elements for the child on the Assessment. You will notice the child's assessment does not require as much information as the adult's assessment. Answer Disabling Condition and Covered by Health Insurance the same way you would for an adult, then Save.

Universal Data Assessment (FY24)							
Complete the information below related to the selected client's housing enrollments may affect or break the logic for 3.917. 3.917 may not alway:		l setup data or missing rec			ictionary, the Default Last Assessment	button will not bring in a	any 3.917 data. Ch
	Assessment Date:*	08/14/2024					
	Age at Assessment:	1					
	Assessment Type: *	Entry	~				
	Assessor: *	Stephanie Hand	Q				
	Program:	CSA TEST ES		*			
	Disabling Condition:*	No	~				
Health Insurance							
Please indicate whether or not the client is covered by health insurance	e. If so, you will be able to record health i	nsurance sources for the	client.				
			Default Last Insu	irance Status			
	Covered by Health Insurance:*	Yes	~				
	🗹 Туре		Status	Reason No 🚯	Other Coverage		
	Private Pay Health Insurance		No 👻	SELECT	~	c	
	Medicare		No	SELECT	~	c	
	Medicaid		No 👻	SELECT	~	c	
	Health Net (Medi-cal) - Adults		No	SELECT	~	c	
	Health Net (Medi-cal) - Childrer	n	No	SELECT	~	c	
	Health Plan of San Joaquin (Me	di-cal) - Adults	No ~	SELECT	~	c	
	Health Plan of San Joaquin (Me	di-cal) - Children	Yes 🗸			c	
	State Children's Health Insuran	ce Program (Medi-cal)	No ~	SELECT	~	c	

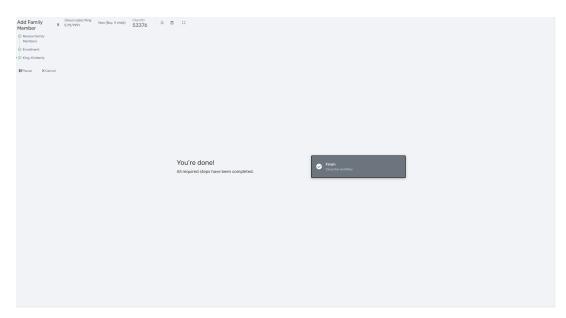
Barriers Assessment for Child

The same rules apply for a child's Barrier Assessment as an adult's Barrier Assessment. If no barriers are present for select the box to mark all options as No, and then Save & Close. If barriers are present, ensure you mark if the condition is indefinite before saving and closing.

Barriers								< 6
Use this t	form to identify whether a client has	each individual b	varrier or not. The C	lients last assessment is displ		Ionally, click Previous Barriers Detail to view information about the defa		w Barrier History
			Barrier	Screen: Disabling Condition:	Special Needs No Condition is			
0	Barrier 12	Help	Present?*		Indefinite	Explanation	Previous Barrier Details	5
	Alcohol Use Disorder	۲	No	~				5
	Chronic Health Condition	٢	No	~				c
	Developmental Disability	۲	No	~				с
	Drug Use Disorder	۲	No	~				с
	HIV/AIDS	۲	No	*				c
	Mental Health Disorder	۲	No	~				c
	Physical Disability	1	No	~				c

Complete Intake Workflow

Once all the information is completed, you will see the Finish screen. It is important to select Finish to complete the workflow.



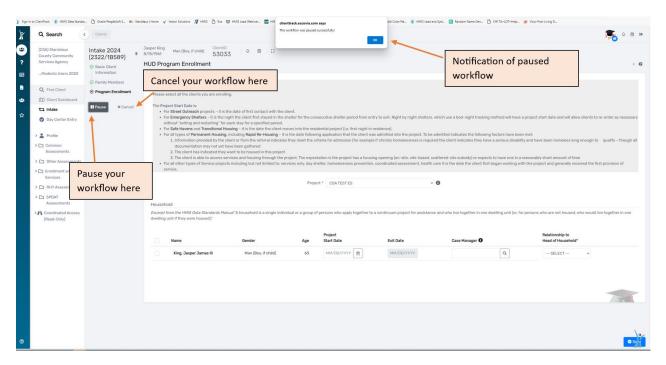
Return to the Client's Dashboard and review the enrollment for accuracy.

X	Q, Search	Clients / Kimberly King's Dashboard					1	۵ 🍋	= 🔅
۳	(CSA) Stanislaus County Community	Kimberly King 10/25/2022 Woman (Girl, if child) Clientil 534	6 4 8 0						
?	Services Agency	Kimberly King's Dashboard							*
	_Modesto Users 2020	Kimberly King's Information						B,	
•	Q Find Client								
*	Client Dashboard	STANISLAUS TEST							
☆	Day Center Entry			Name: King Kimberly	Birth Date: 10/25/2022		Ag	ge: 2	
	> 💄 Profile			Gender: Woman (Girl, if child)			9		
	Common		1						
	Assessments			Client ID: 53416	Race: Black, African A	merican, or African			
	> C Enrolment and				1				
	Services	Check the Inform	ation, Project, F	Project Start Date,				B,	
	> C SPDAT	and Active House	hold Members	to ensure accuracy	1 result found.				
	Assessments	Enrolment Active Household Description Members	Household Type	Project Start Date II Housing Move-In Date Project	t Exit Date !! Case ID EnroIIID !! Days Enrolled Exit Des	tination Organization	Last Assessed	Program Type	
	(Read-Only)	V Active				unaroun ungur nomon			-
		whergency Shelter - Entry Exit		4					
		CSA TEST ES 3	Household with Children and Adults	08/14/2024	94515 137712 72	(CSA) Stanislaus County Community Services Agency	8/14/2024	0	
		Kimberly's Services						ß	
					No records found.				
		Date II	Service	Units	\$ Total Organization	Service Creation Time			
							-		
									í
۲									

YOU HAVE COMPLETED YOUR ENROLLMENT!

Pause Your Workflow

If you need to walk away from your screen and you are in the middle of a workflow, you may "Pause" a workflow by clicking the pause button located on the left-hand side of your screen. The feature will allow you to pause your workflow and return to it later. You will receive a notification indicating your workflow has been paused successfully.



If you are timed out while in the middle of a workflow, review your paused operations to see if the system saved your place before completing a new workflow. Please note, if you move past the HUD Program Enrollment screen, the client will be enrolled in the project. This will result in missing data. If this enrollment shows up on their dashboard and you made a mistake, please reach out to HMIS.

To resume a paused workflow, navigate to the Home Dashboard and select MyClientTrack to view Paused Operations. You will be provided three options for each paused workflow. It is important to view and ensure you resume, restart, or cancel each paused operation to clear up any data quality errors.

Q Search	Home				ا 🛼 ا	¢ @
(CSA) Stepislaus County Community	Stephanie Hand (CSA) Stanislaus County Comr	_Modesto Users 2020	0			
	Paused Operations					
_Modesto Users 2020		and My ClientTreak D				
🖽 User Dashboard	TH	poard-My ClientTrack-Pa				
Data Explorer	Identification		Form Description	Step	Paused	
Current Enrollments w/ Most Recent						
Assessment	Paused Workflows					
🛩 🤱 My ClientTrack		s you've paused. You can resume the process where you l	eft off; restart the workflow, merging in changes made in the designer;	or purge the paused workflow from the system.		
Case Load	Show completed workflows	Description	Workflow	Step	Paused	
Entry By Name List (BNL)	► [®] ×	HMIS 2014 Program Data	King, Jasper James III	Program Enrollment	Aug 16, 2024 12:07 PM	
HHIP Reporting	► [®] ×	HMIS 2014 Program Data	King, Jasper James III	Basic Client Information	Aug 16, 2024 10:58 AM	
Inventory	► '9 ×	HMIS 2014 Program Data	Lopez King, Jesus Michael	Add or Edit	Jul 25, 2024 12:38 PM	
Multiple Clients	> > ×	Day Center Entry		Scan Client	Jul 23, 2024 6:11 PM	
A My Information						
 My Team Change My 						
Password						
Paused Operations						
₩ Submitted Issues		<u> </u>				
> Day Center Administration	Resume Re	estart Cancel				
> 🔓 Testing Menu Group						
> 🏟 Global Administration						
						×

Unique Project Requirements at Entry

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

- 1. Rapid Rehousing Enrollment (RRH) Permanent Supportive Housing (PSH) & Permanent Housing (PH)
- 2. Street Outreach (SO)
- 3. Supportive Services for Veteran Families Enrollment (SSVF)
- 4. Runaway and Homeless Youth Enrollment (RHY)
- 5. Projects for Assistance in Transition from Homelessness (PATH) Enrollment

Rapid Re-Housing (RRH), Permanent Supportive Housing (PSH), & Permanent

Housing (PH) Enrollment

In addition to the previous assessments outlined earlier in this manual, the RRH, PSH, or PH enrollment will require documentation of a client's "Date of Move in," as seen below.

Project Entry Date: Date client/household is admitted into the RRH, PSH, or PH project. You are not required to enter the date of move-in at entry in the event you do not have a date.

Housing Move-In Date: You should use the date the **client takes occupancy** of the unit (when the individual sleeps in the unit). This is not always the same date the lease is signed. If the date of move-in is after the Project Entry Date, you will complete an Update/Annual Assessment to add the date. If the date matches the Project Entry Date, enter the date on the Program Enrollment screen.

Note: The household will remain homeless in the system until a move-in date is recorded. To receive a positive outcome, a move-in date must be entered before exiting the client or household.

Q Search	Clients												🥦 A 🛚 🕫
Community Housing and Shelter Services _Modesto Users 2020	Intake 2024 (2322/1B589) *	Ryan Arroyo 5/15/1991 HUD Pro	Man (Boy, if child) gram Enrollmen	55415	D								< 0
 ■ Q. Fied Cleart □ Cleart Dashboard □ Cleart Dashboard □ Day Center Entry □ Common □ Common □ Common □ Common □ Dark Assessments □ Brit Assessments □ Start Assessments 	Panky Hembers Program Envolvent Program Envolvent II Pause X Cancel	ClientTh Please The Pr • F • F • F • F • F • F	select all the clients you just Start Date is: or Street Outrach project or Emergency Shelters and the selection of the selection of Safe National Start or Safe National Street hear gathered 2. The client has aide or all other types of Servi- soft	clients in the client's family, are enrolling. Let it i the diske of first contact- - it is the right the client first stay period. Unabled HousingIt is the dist the Housing in-Italy Regist Re-Mouling The Client of from the referra called they want to be housing into access services and housing but not limit in period.	ed in the shelter e client moves in using - it is the r l indicates they is project ugh the project ted to: services	nto the residential project (i.e. first date following application that the meet the criteria for admission (for . The expectation is the project has only, day shelter, homelessness pr Project.* CH	night in residence). Clent was admitted into the pro- example if chronic homelesone a housing opening (on-site, site wention, coordinated assessme S MOD ARPA RRH	ject. To be admitted indicates the as is required the client indicates a-based, scattered-site subsidy) of int, health care it is the date the cl	following factors have been hey have a serious disabili r expects to have one in a i ent first began working wit	n met: by and have been homel reasonably short amoun th the project and gener	ess long enough to d t of time ally received the first p		nay not yet have
> A Coordinated Access (Read-Only)		Excerpt	from the HHIS Data Star Name	ndards Manual "A household is a sir Gender	ngle individual o	Project Start Date	ether to a continuum project fo Exit Date	r assistance and who live togethe Case Manager ④	in one dwelling unit (or, for	r persons who are not he Relationship to Head of Househe		together in one dwelling unit if they v Housing Move-in Date	were housed)."
		۵	Arroyo, Ryan	Man (Boy, if child)	33	10/31/2024	MM/DD/YYYY	Stephanie Hand	٩	Self	~	MM/DD/YYYY	с
Ø									Record t the head				2 Raw

Street Outreach

Street Outreach projects will have a Date of Engagement that will be recorded. This date will reflect the date the client became engaged in project services after one or more contacts with the street outreach project. **Note:** if a client is not engaged on the Project Start Date, use Edit Project Entry Workflow to add the Date of Engagement and any missing data when the client is engaged.

X	Q Search	Clients												1	🔨 A 🖻 💌
😁 ?	CARE of Stanislaus County	(2322/1B589)	Michael Barki 6/21/1955	er Man (Boy, if child) Clie 53 gram Enrollment	ntiD 404 ♀ 箇 ⊠										< 0
	_Modesto Users 2020	 Basic Client Information 	1100110	gran Enrollinent											
	Q Find Client	Samily Members		he Project you are enrolling the o ack will display a list of clients in											
-	Client Dashboard	Program Enrollment		elect all the clients you are enro											
\$	 Intake Day Center Entry 	III Pause × Cancel	• Fc		the date of first contact with the night the client first stayed in the		consecutive shelter period from	n entry to exit. Night by night she	iters which use a bed-	hight tracking meth	od will have a pro	iect start date and will a	low clients to re-e	inter as necessary without "exiting a	nd restarting" for
	> 💄 Profile		03	sch stay for a specified period.	lousing - it is the date the client m										
	Common Assessments			or all types of Permanent Housin	g. including Rapid Re-Housing - it	is the date foll	owing application that the clier	nt was admitted into the project."					ing enough to q	ualify - though all documentation m	ay not yet have
	> 🗅 Other Assessments			2. The client has indicated the	y want to be housed in this project ervices and housing through the	roject. The ex	pectation is the project has a h	ousing opening (on-site, site-bar	ed. scattered-site sub	idy) or expects to h	ave one in a reasc	pnably short amount of ti	ime		
	> 🗅 Enrollment and Services		• Fc		cts including but not limited to: se		y shelter, homelessness prever	ition, coordinated assessment, h						rovision of service.	
	> 🗅 RHY Assessments						Project:* CARE S	treet Outreach 👻 🛈							
	> C SPDAT Assessments		Househ	old											
	> A Coordinated Access (Read-Only)		Excerpt f	from the HMIS Data Standards M	anual "A household is a single indiv	idual or a grou	p of persons who apply togeth	er to a continuum project for assi	stance and who live to	ether in one dwellin	ng unit (or. for per	sons who are not housed	l, who would live t	ogether in one dwelling unit if they w	vere housed)."
				Name	Gender	Age	Project Start Date	Exit Date	Case Mar	ager O		Relationship to Head of Household	d•	Date of Engagement	
			۵	Barker, Michael John	Man (Boy, if child)	69	11/01/2024	MM/DD/YYYY	Stephar	ie Hand	Q	Self	*	MM/DD/YYYY	5
													/		
												/			
												<u> </u>			
										Enter	r a date	e of enga	gemen	t if this	
												e Project			
										mate	ineo en	e i reject	otaree	Jaco	
۲															Save Save

Record their Current Living Situation. This may be different than the Prior Living Situation previously recorded.

)ř	Q Search	Clients		🅵 ¢ 🖻 🕫
(1) ?	CARE of Stanislaus County	Intake 2024 (2322/18589) *	Michael Barter Aan (Bey, if child) 634004 0	
•	_Modesto Users 2020	 Basic Client Information 	Current Living Situation	< 0
в	Q Find Client	Family Members	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.	
	Client Dashboard	Program Enrollment	Information Date:* 10/01/2024	
-	1그 Intake	🗸 🛊 Michael Barker	Enrollment:* 10/01/2024 - CARE Street Outroach 🗸	
\$	Day Center Entry	✓★ New Assessment		
	> 💄 Profile	 Barriers / Special Needs 	Current Living Situation Information	
	> 🗀 Common	O Domestic Violence	Current Living Situation.** Place not meant for habitation •	
	Assessments	⊘ Income	Unsheltared Detail:* Living in car, truck or van 🗸	
	> 🗅 Other Assessments	 Current Living Situation 	Location Detail:	
	Enrollment and Services	O Translation		
	> 🗅 RHY Assessments	Assistance Needed	Record Contact:	
	> C SPDAT			
	Assessments	Pause X Cancel		
	Coordinated Access (Read-Only)			
۲				Save 2

Supportive Services for Veteran Families (SSVF) Enrollment

In addition to the previous assessments outlined earlier in this manual, a SSVF enrollment will need additional required information upon intake. It is important to make sure the Veteran Status for the head of household is marked Yes. You can view this information on the Client Information screen.

X	Q Search	Clients		Sec. 2 - 2 - 2 - 2 - 2 - 2 - 2 - 2 - 2 - 2
۲	Catholic Charities Diocese of Stockton	(2322/1B589) *	Maria Denovan – ClientID A 🗎 🖸	
?	_Modesto Users 2020	Basic Client Information	Client Information	e >
	Q Find Client	O Family Members	Basic Client Information	
	Client Dashboard	O Program Enroliment		elds. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or
*	tl Intake	III Pause × Cancel	refuses to provide information. If the required data is collected then ClientTrack automatically records that full	
슈	Day Center Entry		First Name:*	Maria
			Last Name: *	Danavan
	> 💄 Profile		Middle Name:	Rose
	> Common Assessments		Suffec	
	> 🗅 Other Assessments		Name Quality:*	Full name reported v 0
	> Enrollment and Services		Social Security Number:	525 - 69 - 8547 Q
	> C RHY Assessments			
			Basic Client Demographics	
	Assessments		Birth Date:*	10/3//1985
	> A Coordinated Access (Read-Only)		Client Age:	39
	(near-only)		Date of Birth Quality:*	Approximate or Partial D08 Reported
				O Full DOB Reported
				C Client deen't know
				Client prefers not to answer
			Race and Ethnicity:*	Asian or Asian American
				Black, African American, or African VHispanic/Latina/e/o
				Middle Parkers of Made Million
			Additional Race and Ethnicity Detail:	Mexican American Make sure the client reports
			Gender.*	Man (Boy, # child) as a Veteran
				Culturally Specific Identity (e.g., Two-Spirit)
				Transpender
			Specify Different Identity.*	A-gender
			Pregnancy Status:	SELECT V
			Veteran Status:*	
			Makaran Analakanan Madésakian	ericov u D
۲				♥ Filish

Basic Information and Universal Data Assessment

Q Search	Cilents				*
Catholic Charities Diocese of Stockton	Intake 2024 (2322/18589) *	Maria Donovan 10/31/1985 Multiple-Genders 53379 ♀			
_Modesto Users 2020	Basic Client Information	Universal Data Assessment (FY24)			
Q Find Client	Family Members	Complete the information below related to the selected client's housing status and other relevant information.		lescribed in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 of	data. Changing any project setup data with e
Client Dashboard	Program Enrollment	enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed			
tl Intake	∼ 🚖 Maria Donovan		Default Client's Last Assess	sment	
Day Center Entry	New Assessment	Assessment Date:*	10/01/2024		
A Profile	II Pause X Cancel	Age at Assessment:	38		
Common		Assessment Type:*	Entry		
Assessments		Assessor:*	Stephanie Hand Q		
C Other Assessments		Program:	CCD SSVF HP V		
Enrollment and		Disabling Condition:*	Yes 👻		
Services		Household income as a Percentage of AMI:*	30% or less 👻	Both are required fields	
C SPDAT		VAMC Station Number:*	(612) N. California, CA 🐱	for SSVF	
Assessments					
Coordinated Access (Read-Only)		Enrollment CoC			
		Select or enter the CoC code assigned to the geographic area where the head of household is staying at the tim	e of project entry. Enrollment CoC will be defaulted to	to the program's CoC within a workflow.	
		Enrollment CoC:*	CA-510 - Turlock/Modesto/Stanislaus County CoC	*	
		Living Situation			
		Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program a	dmission.		
		Prior Living Situation:*	Place not meant for habitation	~ 0	
		Unsheltered Detail:*	Living in car, truck or van		
		Length of stay in the prior living situation:*	One night or less		
		Approximate date this episode of homelessness started:*	09/30/2024		
		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:	One time v		
		Total number of months homeless on the street, in ES, or SH in the past three years :*	One month (this time is the first month) $$		0
		Health Insurance			
		Health Insurance Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health i	surance sources for the client.		

Add Household Income as a Percentage of AMI and VAMC Station Number.

Veteran Information

This section will be completed for the head of household of the enrollment. If the exact date of entry or exit is not known, use January 1 of the year.

X	Q Search	< Clients				🥦 e 🖷	64
۲ ۲	Catholic Charities Diocese of Stockton	Intake 2024 (2322/18589) *	00077				
r E	"Modesto Users 2020	Basic Client Information	Veteran Information			<	Ð
8	Q Find Client	Family Members	The Veteran information is used to collect details about the veteran's service.				
	Client Dashboard	Program Enrollment Maria Donovan		If you do not	know the e	exact full	h l
- T	til Intake		Branch and Discharge Status	data of Entry	and Exit fr	ana Comilao	
☆	Day Center Entry	✓ ★ New Assessment ⊙ Veteran Details	Please select the branch and discharge status. The HHIS 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 upgraded during enrollment, the record should be edited to reflect the change."	date of Entry		om service	
	> 💄 Profile	O Connection with	Branch of the Military.* Army	use 01/01 and	d the year		
	> Common Assessments	O Domestic Violence	Discharge Status:* Honorable			C.	
	> C Other Assessments		any and go a statutes. I want a statute of the statutes of the				
	> C Enrolment and	O Homeless	Military Service Dates				
	Services	Prevention	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 of the standard date dates and the standard dates and t	ation. For HMIS purposes, ClientTrack will	always calculate years of mil	itary service only using year.	
	> C RHY Assessments	O Employment	Service Entry Date:* 11/20/2010	Service Exit Date: * 11/20/2020	0 🗎		
	> C SPDAT Assessments	O Education					
	> Coordinated Access	Pause X Cancel	Piease Select Theatre(s) of Operation(s)	St	atus*		
	(Read-Only)		Theatre of Operations: World War II		No	۲ °	
			Theatre of Operations: Vietnam War		No	~ °	
			Theatre of Operations: Persian Oulf War (Operation Desert Storm)		No	° 0	
			Theatre of Operations: Afghanistan (Operation Enduring Freedom)		No	~ °	
			Theatre of Operations: Iraq (Operation Iraq) Freedom)		No	້ ວ	
			Theatre of Operations: Iraq (Operation New Dawn)		No	° 5	
			Theatre of Operations: Other Peace-keeping Operations or Military Interventions (such as Lebanon, Panama, Somalia, Bosnia, Kosovo)		Yes	° °	
			Theatre of Operations: Korean War		No	č č	
						2	i.
Ø						Ø Sø	ive

Connection with SOAR

a contrario	C Dients	🥦 4 🖻 🕫
Catholic Charities Diocese of Stockton	Intake 2024 # Main Roman Hullet-General Circle 10 0 B Circ	< 8
_Modesto Users 2020	Information	
Q Find Client	© Family Members Indicate the Connection with SQAR for the cirent below	
Client Dashboard	Program Erroliment Dedust Clears's Last Assessment	
L4 Incate	Y ★ Maria Donvan	
Day Center Entry		
> 🚊 Profile		
> Common	GO Connection with SOAR: Yes v	
Assessments	Domestic Viclence	1
> 🗅 Other Assessments	s O Income	
> C Enrollment and Services	O Hondesa Prevention	
> 🗅 RHY Assessments	© Employment	
> C SPOAT Assessments	U Ó Eñceton	
>A Controlated Access (Read-Only)	IF hore Konst	
		Save

SSVF Homelessness Prevention Assessment

Complete the entire Homeless Prevention Assessment. The system will automatically total the HP Applicant points. The user must enter the Grantee Targeting Threshold Score.

)ř	Q, Search	Clients		🕵 Ф 🖱 🖗
* ?	Catholic Charities Diocese of Stockton "Modesto Users 2020	Intake 2024 (2322/1B589) Basic Client Information	Mara Demonan Multiple-Guides 53379 0 B C HP Targeting Criteria	< 0
8	Q Find Client	Family Members Program Enrollmen	Answer the SBYF IP Tageting Criteria to see the clerify IP applicant lotal points. t SSYF Homeless Provention Assessment	
\$	t3 Intake ⊘ Day Center Entry	 ★ Maria Donovan ★ New Assessment Ø Veteran Details 		
	> 🚊 Profile > 🗁 Common Assessments	 Connection wir SDAR Domestic Viole 	Is identification baration screener required? • Q Yas	
	Other Assessments Enrollment and Services	 Income Homeless Prevention 	Housing loss expected within* □ 1-6 days @7-13 days	
	RHY Assessments B SPDAT Assessments	O Employment	[4-21 days More than 21 days Current household income: " 20 (6, not employed, not receiving cash benefits, no other current income)	
	→ M Coordinated Access (Read-Only)	III Pause 🛛 🗙 Cans	1-14% of Area Median hourse (AMI) for household size 0 15-500 r AMI for household size Nore than 3Xis of AMI for household size	
			Plat experience of homelessness (sheed) sheller/hansitional housing) (sny sdall) *	
			Head of Household is not a current leaseholder/inenter of unit: Yes O No	
			Head of Household has never been a leaseholder/innter of unit: 🕐 Yes O No Currentiv at risk of losina a terrant-based housing an a subadiced buildings or unit "O Yes	
			Powarhald). 🔄 No Rential Evictions within the past 7 years (any solut)* 🌑 No prior rential evictions	
			Tors media relation Tors media relations Zerosen director drug dealing or manufacture, or Holony offense against generative organizations Demonsi record for anson, drug dealing or manufacture, or Holony offense against generative organization One of the dealement of the de	
			more that the second seco	
۲				Save 🖉

Employment Assessment

Note: These are conditional questions, and the second question will change depending on the answer provided in question one.

semployed, record the hours worked in the week prior to assessment, and select the tenure of the client is employed, record the hours worked in the week prior to assessment, and select the tenure of the employed						
	1	Default Client's Last Assessment			Default Client's Last Assessment	0
		Assessment Active			Assessment Active	
Assessment Date:*	10/01/2024		Assessment Date:*	10/01/2024		
Employed?*	No	~	Employed?*	Yes	~	
Why Not Employed :*	Looking for work		Type of Employment:*	Full-Time	~	

Education Assessment

Q Search	< Clients	🦉 o a 🕫
Catholic Charities Diocese of Stockton	Intake 2024 (2322/18589)	Maria Denovan Multiple-Genders ClarellD 0 © 11
Modesto Users 2020	 Basic Client Information 	Adult Education Assessment 🤄 🕀
Q Find Client	Ø Family Members	Indicate If the client is enrolled in an education or training program or working lowerd a degree at the time of assessment. Indicate if the client has completed vocational training or received an apprenticeship. Select Highest Grade Completed. If the client has completed a high school diploma or above, select
Client Dashboard		the secondary education degree() the client has surred.
tl Intake	🗸 🛊 Maria Donovan	Denator Gunna's Laska Assessment
😭 💿 Day Center Entry		Assessment Active
	Veteran Details	Assessment Date: * 10/01/2024
> 💄 Profile	 Connection with SOAR 	Highest Grade Completed * Post-secondary school v
> Common Assessments	O Domestic Violence	
> 🗅 Other Assessment		Seconday Education: Associates Degree Velocitation Degree Velocitation Degree
> C Enrolment and	Homeless	Masters Degree
Services	Prevention	Doctorate Degree
> 🗅 RHY Assessments		
> C SPDAT Assessments	Education	
) (Constantial Acces (Issar Ony)		
D.//Clienttrack.eccovia.com/MainPage.as	pxîltineztop#	

Runaway and Homeless Youth (RHY) Enrollment

In addition to the previous assessments outlined earlier in this manual, a RHY enrollment will need additional required information upon intake.

Basic Center Program (BCP)

This assessment is for Basic Center Program-Emergency Shelter Programs Only. The RHY-BCP status occurs at the point which eligibility for FYSB has been determined. The status date may be on or after the project entry date. **Note:** If no is marked, then you must provide a reason.

Colleven Burks 2/28/2009 Woman (Birl, if child) 53383 0		Colleen Banks 2/28/2008 Woman (Birt if child) 53383 RHY BCP Status Assessment	2/28/2008 Woman (Girl, if child) 53383			
To determine the number of homeless persons eligible for FYSB in RHY BCP-funded emergency shelter project	ts.	To determine the number of homeless persons eligible for F	PYSB in RHY BCP-funded emergency shelter project	5.		
RHY - BCP - Status Collect once at project start for each stay. This element is required to be completed before project exit. Date Status Determines.*	10/01/2024	Conditional questions depending on eligibility	uired to be completed before project exit. Date Status Determined:* Youth Eligible for RHY Services:*	10/01/2024		
Vouth BigBel for RMY Services." Reason why services are not funded by BCP grant;*	No SELECT - Immediate Reunification Ward of the Site - Immediate Reunification Ward of the Cimmal Justice System - Immediate Reunification Other			Yes SELECT Yes No Client Desn't Know Client prefers not to answer Data Not Collected		

Employment Assessment:

Colleen Banks Voman (0irt, If child) CollentID 53383	Colleen Banks Woman (Girt, If child) Client00 ↓ ⊕ ⊕ C
HMIS 2017 Employment Assessment	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, and select the late Carloud Client's Late Assessment Assessment Date: * 10/0/2024	eneck the uppropriate employment actual to the one of assessment. In the energy of the trouble worked in the week prior to assessment, and assest the terminer

Education Assessment:

	Clients				🥦 A 🛎 🖌
	take 2024 322/1B589) *	Colleen Banks 2/28/2008 Woman (Girl, If child) ClientID 53383 🗘 🖨 📋 🖸			
0	Basic Client Information	Child Education Assessment			< 🕀
ø	Family Members	Indicate if the child is currently enrolled in school at the time of assessment. If the child is enrolled, select the t	school and enter the school name. If the child is not enrolled, ent	ter date of last enrollment and reasons why the child is not enrolled. Enter any additional comments.	
ø	Program Enrollment		Default Client's Last Assessment		
~*	Colleen Banks				
~	🛊 New Assessment		Assessment Active		
	 BCP Status 	Assessment Date:*	1/2024		
	 Barriers / Special Needs 		Grade		
	⊘ Income	School Status:*	nding school regularly 👻		
	Semployment	Comments:			
	Ohild Education				
	O Health				
	O RHY Entry Assessment				
	O Formerly Ward Of				
	Pause X Cancel				
	Fause A Gancer				

Health Assessment

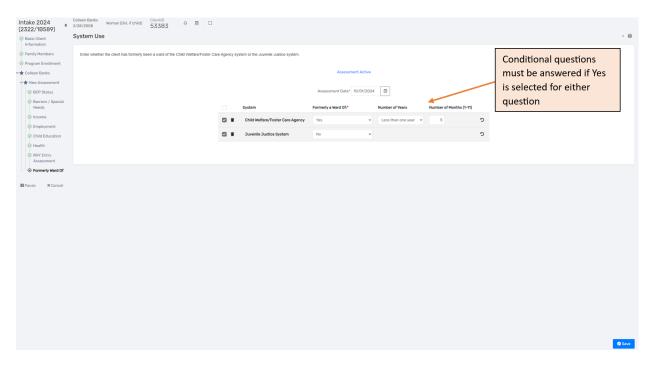
If Pregnancy Status is marked Yes, a Pregnancy Due Date must be entered.

Intake 2024 Colleen Bants 2222/19589) Collect Control	< 8
Family Members Select the appropriate general health status. If applicable, you will need to select the appropriate programcy status. If the client is program, you will need to record the due date. Orgam Enrolment Orgam Enrolment	
or of operating and a second method. Best Assessment of the second seco	
Very New Assessment Active	
CP Status Assessment Date: 10/01/2024	
Burriers / Special General Health Status* Very Good Very Good	
menos Dental Health Status: * Good	
© Employment Mental Health Status.* Fair •	
© Child Education Pregnancy Status: Yes •	
Health Pregnancy Due Date:* 12/50/2024	
Ansempt	
Assessment	
III Pase X Cancel	€tor

RHY Entry Assessment

	Colleen Banks 2/28/2008 Woman (GirL if child) ClientID 53383 0 10 13				
	RHY Entry Assessment (Client WS)				< ⊖
Family Members	The RHY entry assessment is used to collect project entry data for RHY funded projects.				
Program Enrollment					
🚖 Colleen Banks		Assessment Active			
🗸 🚖 New Assessment	Assessment Date: *	10/01/2024			
 BCP Status 	Sexual Orientation (R3):	Bisexual 🗸 🖉			
 Barriers / Special Needs 		R3 - Required for head of household and adults in: Runaway Homeless Youth (RHY) funded projects		-	
⊘ Income		Youth Homeless Demonstration Program (YHDP) using the Suppleme Permanent Supportive Housing (PSH) projects funded by (1) HUD: Co			
⊘ Employment	Referral Source (R1):	School	~ 0		
O Child Education		R1 - Required for head of household and adults in all Runaway Homeless		except for Street Outreach.	
⊘ Health					
 RHY Entry Assessment 	Critical Issues (R13)				
O Formerly Ward Of	R13 - Required for head of household and adults in all Runaway Homeless Youth (RHY) projects except for Street Outree	ch.			
Pause × Cancel		Critical Issue	Status*		
		Unemployment - Family member	oYes ⊃ No		
		Mental Health Disorder - Family member	No Yes O		
		Physical Disability - Family member	Yes ⊅ ⊙No		
		Alcohol or Substance Use Disorder - Family member	ୁ Yes ୨ O No		
		Insufficient Income to support youth - Family member	oYes o		
		Incarcerated Parent of Youth	oYes ⊃ No		
				P	
				•	Save

System Use Assessment



Projects for Assistance in Transition from Homelessness (PATH) Enrollment

Project Enrollment

Make sure you add the Date of Engagement, Date PATH Status Determined, Client became enrolled in PATH, and if NO, Reason not enrolled in PATH, then click Save **Note:** You can close this section without Date of Engagement

Intake 2024 (2322/18589)	Vanessa Maciel 8/1/1980 Woman (Gir	rl. if child) ClientID 53380										
Basic Client Information	HUD Program Enrollr	ment									*	0 5 8 0
 Family Members Program Enrollment 	Select the Project you are ClientTrack will display a li Please select all the client	ist of clients in the client'										
II Pause X Cancel	For Emergency She each stay for a spec For Safe Havens an For all types of Perr 1. Information p been gathere 2. The client has 3. The client is a	a projects – it is the date there – it is the night the cified period. d Transfitonal Housing – manent Housing, includir provided by the client or f d is indicated they want to l ble to access services a	it is the date the client moves i ng Rapid Re-Housing – it is the	into the residential proje date following applicatio meet the criteria for adr t. The expectation is the only, day shelter, homele	tt (i.e. first night in residence n that the client was admitt nission (for example if chroni project has a housing openir	i), ad into the project. To be a ic homelessness is require ng (on-site, site-based, so ated assessment, health o	idmitted indicates id the client indica attered-site subsi	the following factors ha ates they have a serious idy) or expects to have o	ve been met: disability and have been ne in a reasonably short	homeless long enough amount of time	to re-enter as necessary without "exiting an to qualify - though all documentation ma a first provision of service.	
	Household											
		a Standards Manual "A h	ousehold is a single individual o	or a group of persons wh	o apply together to a continu	uum project for assistance	and who live toge	ether in one dwelling uni	t (or. for persons who ar	e not housed, who wou	ld live together in one dwelling unit if they we	ere housed).*
	Name	Gender	Project Age Start Date	Exit Date	Case Manager	Relationsh Head of He		Date of Engagement	Date PATH Status Determined	Client became enrolled in PATH	Reason not enrolled in PATH	
	Maciel, Vanessa Maria	Woman (Girl, if child)	44 06/30/2024	MM/DD/YYYY	Stephanie Hand	Q Self	×	MM/DD/YYYY	MM/DD/YYYY	SELECT 🗸		c
	Chavez, Leslie	Woman (Girl, if child)	1 MM/DD/YYYY	MM/DD/YYYY		Q SELEC	- v		\checkmark			
								PATH	l specific f	ields		
												v

SOAR Connection

Vanessa Madell 8/1/1990 Woman (Birl, If child) 53380 A 🗎 🖸	
SOAR Connection	< 🕀
Indicate the Connection with SGAR for the client below Default Client's Last Assessment O	
Assessment Active	
Assessment Date:* 06/30/2024	
Connection with SOAR* No	
	1

Current Living Situation

Vanessa Maciel Woman (Girl, if child) ClientID 4 🗎 🕄	
Current Living Situation	< 0
Record the Clients Current Living Situation information below. If desired record a contact by checking the Recc	rd Contact and filing out the information for the contact. Also other services can be recorded.
Information Date: *	06/30/2024
Enrollment:*	06/30/2024 - BHRS PATH Supportive Services 🐱
Current Living Situation Information	
Current Living Situation:*	Place not meant for habitation
Unsheltered Detail:*	Other unsheltered situation 🖌
Location Detail:	
Record Contact:	

Add Services

Currently RRH, SSVF, RHY, and PATH projects are required to enter services into HMIS. However, any project can track services. After completing an enrollment for a client, you can document services associated with the project enrollment two ways:

#1 From the Client Dashboard by clicking on the Client's Services on the bottom of the page.

#2 From the Client Dashboard, navigate to the Enrollment and Services tab and go to Services.

(CSA) Stanislaus	Dasper King 8//5/1961 ClientD 53033 の値<		1	
County Community Services Agency	Jasper King's Dashboard			
_Modesto Users 2020	Jasper King's Information		Ø	5
Client Dashboard	STANISLAUS TEST			
 Day Center Entry Profile 	Name King, Jasper James III Birth Date 8/15/1961		Age: 63	3
Common Assessments Other Assessments	Gender: Man (Boy, if child) Client ID: 53033 Race: Asian or Asian American, Black, African American, or African			
C Enrollment and Services Octermine Referral Eligibility	Jasper #2		ß	5
 Enrollments Housing Program Eligibility and 	Enrollment Active Household Type Project Start Date 1: Housing Move-In Date Project Exit Date 1: Case ID EnrollD 1: Days Enrolled Exit Destination Organization ✓ Active	Last Assessed	Program	m Typ
Availability	Emergancy Shelter - Entry Exit	rvices Agency 8/14/2024	0	
CE Services	Jasper's Services		2	5
SPDAT Assessments Assessments (Read-Only)	H1 No records found. Date II Service Creation Time			

Select Add New Service. You will attach the service to an enrollment. The Date will Default to the date you are entering the service, make sure you change if needed. If the enrollment is already closed, you will not see an option under Enrollment, make sure you change the service date to a date during the active enrollment or you will get "Option not in the list" and the service won't be attached or show up on Federal Reports. Tip: Change the service date first so the active enrollments will accurately show, and you can visually see it is attached. There are many services in the service tab, however, if your organization would like to add one, please reach out to the HMIS team.

8	Home Search	Clients / Jasper King's Dashboard / Client Services / Service		🕦 4 🛎 🕫
(4) ?	(CSA) Stanislaus County Community Services Agency	Jasper King 8/15/1961 Man (Boy, if child) ClientID 53033 A	٥	< 0
	_Modesto Users 2020	Make sure you scroll		
8	Q Find Client	down to view the	dow.	
-	D Client Dashboard	services under your	Family Income:	
☆	1⊐ Intake ❷ Day Center Entry	correct project type.	Income Family Income Family Members Poverty Level % of Poverty \$290.00 \$290.00 \$1 \$1255.00 \$2111%	
	> 💄 Profile	Enrollment:*	08/14/2024 - CSA TEST ES 👻	
	> Common	cante	SELECT 🗸	
	Assessments	Service :*	Shelter Night v Location: CSA v	
	Conter Assessments Conter Assessments Services	Date:* Units Of Measure:*	Dotars If you select dollars, enter	
	 Determine Referral Eligibility 		Offinites O Count an amount below.	
	Enrollments	Units:*	100	
	Housing Program	Unit Value:*	\$0.00	
	Eligibility and Availability	Total:	\$0.00	
	 Quick Services 	User Performing the Service:	Stephanie Hand Q	
	A+ Referrals	Comments:	You can add more information in the comments	
	Services			
	CE Services RHY Assessments		include check numbers for financial services	
	> C SPDAT Assessments			
	Coordinated Access (Read-Only)			
() https://diam	trark eccouix com/MainPane avou?Inlini	utod		Save Cancel

You can view entered services the same way you add a new service. You are also able to edit a service. If you need a service deleted, please submit an issue ticket with the service type, the date, and the reason for removal.

1.			-		
X	Q Search	C Dients / JasperKing/s Dashbaard	۵ 🍋	₿ 🕪	
۳	(CSA) Stanislaus County Community	3asper King 8/15/1951 Man (Boy, If child) ClientID ↓ ClientID 53033 ↓ ClientID ↓ ClientID			
?	Services Agency	Jasper King's Dashboard		×	
	_Modesto Users 2020	Jasper King's Information	ľ		
	Q Find Client				
-	Client Dashboard	STANISLAUS TEST			
☆	13 Intake	STANISLAUS TEST			
	Day Center Entry	Name King Japper James II Birkh Date 8/15/7911	Age: 63		
	> 💄 Profile	Gender Man (Boy, if child)			
	Common Assessments	Client ID 53033 Raor Asian or Asian American, Black African American, or African			
	> 🗅 Other Assessments				
	✓ □ Enrollment and				
	Services	Jasper's Enrollments	ß		
	 Determine Referral Eligibility 				
	Enrollments	Treat found.			
	Housing Program	Ervolment Active Household Devorption Members Household Type Project Start Date II Housing Move-In Date Project Exit Date II Case ID EnvollD II Days Enrolled Exit Destination Organization Last Asses	ised Program T	ype	
	Eligibility and	v Aobin			
	Availability Quick Services	✓ Emergency Shelter - Entry Exit			
	A Referrals	Cost Test Est 1 Household without Chai A quick glance at all entered services 2 (CSA) Staristana Courty Community Services Agency 814/2024	0		
	Services				
	CE Services	View/Edit service			
	> 🗅 RHY Assessments		6		
	> 🗅 SPDAT Assessments	1 result found.			
	> Coordinated Access	Date II Service Units Stotal Organization Service Creation Time			
	(Read-Only)	OB162024 Shetter Night 1.00 \$0.000 (CSA) Starislaus County Community Services Agency 08162024 218PM			

Quick Services

Quick Services allows you to record multiple services for a client at the same time.

Navigate to the Client Dashboard and select the Enrollment and Services folder. Select Quick Services.

	Clients / Jasper King's Dashboard							- 🍋	5 '
SA) Stanislaus ounty Community	Jasper King 8/15/1961 Man (Boy, if child) Clienti 530	¤ 33							
rvices Agency Iodesto Users 2020	Jasper King's Dashboard								
00010 00010 2020	Jasper King's Information								ľ
Client									
 Client Dashboard Intake 	STANISLAUS TES	бт							
Day Center Entry		Name:	(ing, Jasper James III		Birth Date: 8/15/1961			Age:	63
Profile		Gender:	fan (Boy, if child)						
Common Assessments		Client ID:	53033		Race: Asian or Asian American, Black, African Americ	can, or African			
Other Assessments	ts								
Enrollment and Services	Jasper's Enrollments Enro	llments and Se	vices						G
Determine									
Referral Eligibility	ty								
Referral Eligibility					1 result found.				
Referral Eligibility	Enrollment Active House Description Member		Project Start Date 1	Housing Move-In Date		dt Destination Organization	Last Assess	ed Progra	gram
Referral Eligibility	Enrollment Active House		Project Start Date 11	Housing Move-In Date		dt Destination Organization	Last Assess	ad Progra	gram
Referral Eligibility Enrolments Housing Program Eligibility and	Enroliment Active House Description Member V Active V Emergency Shelter - Entry Exit	s Household Type		Housing Move-In Date	Project Exit Date II Case ID EnrollD II Days Enrolled Ex			ed Progra	gram
Referral Eligibility Enrollments Housing Program Eligibility and Availability Quick Services Referrals	Enrollment Active House Description Member V Active V Emergency Shelter - Entry Exit		Project Start Date II	Housing Move-In Date	Project Exit Date II Case ID EnrollD II Days Enrolled Ex	At Destination Diganization			gram
Referral Eligibility Enrollments Housing Program Eligibility and Availability Quick Services Referrals Services	Enrollment Active House Description Memberr Active Active Chargency Shelter - Enlay Exit CSA TEST ES 3	s Household Type		Housing Move-In Date	Project Exit Date II Case ID EnrollD II Days Enrolled Ex				gram
Referral Eligibility Eligibility Housing Program Eligibility and Availability	Errollment Aetike Noon Description Member	s Household Type Household with Children and Adults		Housing Move-In Date	Project Exit Date II Case ID EnrollD II Days Enrolled Ex			0	
Referral Eligibility Enrollments Housing Program Eligibility and Availability Quick Services Services CE Services RHY Assessments SPDAT	Errollment Aetike Noon Description Member	s Household Type Household with Children and Adults		Housing Move-In Date	Project Exit Date II Case ID EnrollD II Days Enrolled Ex			0	
Referral Eligibility Enroliments Housing Program Eligibility and Availability Quick Services Referrals Services CE Services	Evrollment Aelike House Description Member ✓ Active ✓ Emergency Statter - Entry Exit — CSA TEST ES 3 Jasper's Servie Quick S	s Household Type Household with Children and Adults		Housing Move-In Date	Project Exit Date II Care ID ErveillD II: Days Erveiled Ex			0	
Referral Eligibility Caroliments Caroliments Program Eligibility and Availability Ouick Services Carolic Services	Errolment Active Hour Description Member Cative Cative Contest es 3 Dasper's Servie	Household Type Household with Children and Adults Services	06/14/2024		Project Exit Date !! Case D ErveiteD !! Days Erveited Ex 54515 137537 114 2 results found.		Community Services Agency 18/28/2024	0	gram '

Enter the date of the service(s). **Note:** all recorded services must be recorded on the same date. You are also unable to add services notes through Quick Services. Select the enrollment you wish to attach the service(s) to. Select the box next to the service(s) you wish to enter. You may change the unit type, unit, and unit value for each individual service. Once finished, select Save & Close.

X	Q Search	Clients / Quick Service						۳.	4 🖱 🗭
2 ?	(CSA) Stanislaus County Community Services Agency	Jasper King Man (Boy, if child) ClientiD ↓ ⊕ ⊕ C 8/15/19o1 ↓ ⊕ ⊕ C Quick Service							< ⊖
	_Modesto Users 2020	Use the Service Screen list to filter services available. You may also filt	r services available by Grant and/or Provider. Sele	ct the services the client has received a	nd verify the Units a	nd Unit Values.			
	Q Find Client		Service Screen:*	Direct Services 🗸					
-	Client Dashboard		Date:*	08/23/2024			Selec	t the date of the service(s)	
☆	13 Intake		Grant:	SELECT	~				
	Day Center Entry		Provider Name:	٩					
	> 🚨 Profile		Enrollment:*	08/14/2024 - CSA TEST ES 👻 🚄					1
	> 🗅 Common		User Performing the Service(s):	Stephanie Hand Q			Make s	sure the enrollment is active & attached	
	Assessments		Location:	CSA V					
	Other Assessments Enrollment and				aving 1-200 of 254 r	esults. Next			
	Services	Select the arrow to	Service* 12	Unit Type					
	Determine	collapse/expand the	×	Unit Type	Units*	Unit Value*	Total Help		
	Referral Eligibility		Beard Brook Park (4)						
	A Housing	sections	> DST Health (0)						
	Program Eligibility and		> DST Housing (0)						
	Availability		> RHY Navigation (0)						
	Quick Services Referrals		P Inter Navigation (0)						
	Services		> S0 Assisted Technology (0)						
	CE Services		S0 Basic Needs (2)						
	> 🗅 RHY Assessments		Abatment	Count ~	1.00	\$0.00	\$0.00		
	> C SPDAT Assessments								
	> Coordinated Access		Cell Phone Assistance	Count 👻	1.00	\$0.00	\$0.00		
	(Read-Only)	Select the box	Cultural Linkages	Count 👻	1.00	\$0.00	\$0.00		
			Food/Food Voucher	Count	1.00	\$0.00	\$0.00		
		of the	Hygiene Kit	Count ~	1.00	\$0.00	\$0.00		0
		service(s) you	Language Barrier Assistance	Count 👻	1.00	\$0.00	\$0.00		
		wish to select			6.00	\$0.00	\$0.00		
۲								Save & Close	Cancel

Add Case Notes

To add case notes, navigate to the Client Dashboard and select Profile from the options on the left-hand side of the screen. Make sure you are on the client's dashboard in which you would like to record a case note.



Complete all the required fields to leave a case note. The date will always default to the current date. Make the adjustments if necessary. The body of the case note will auto-populate the client's name and Client ID. Selecting Read Only will allow the user to lock the note, prohibiting anyone other than you from editing the note. You will be required to enter a service and attach it to an enrollment. **Note:** This must be an open enrollment. The date may have to be adjusted for the enrollment to show on the drop-down menu.

Q Search	Dients / Dient Case Notes vito Services	庵 A 🖱 🕫
(CSA) Stanislaus County Community Services Agency	The other will always default to today's date	(0
_Modesto Users 2020		ssociated with this
Q Find Client	Enter a title for the note User * Usanov Hord Ca	
Day Center Entry	Regarding * Nete Type - SELECT v	
V S Profile	Errolment:SELEGT 🗸 🔿	
D Card Alias History	Supervisor Review If is supervisor Review a required please check the law and select the name of the individual to make the assignment.	
Address History	Review Regions	
Case Managers Case Notes Client Files Current Living	Image: Constraint Constraint Image: Constrate Image: Constrate Im	
Situation f Document Check Service Information	Care Note Core to soos Locks the note so other users can only view not edit	
Release Information Release Exceptions Interested	Bead Only D	
Others D Notifications Photo L Veteran	burne Type note into this text box Default Envelopert - SELECT - • • • • along with the control of the service	-
Information Common Assessments Other	Evolution of Measure Units of Measure Units Weak Units " Bervice Units of Measure Units Weak" Bervice Units of Measure Units Weak	tied to
Assessments		Save Cancel

Once you save the note, you will return to the Case Notes page. From here, you can edit, view, or print your note. **Note:** Case notes are restricted to case managers within your organization. No one outside of your organization can view your case note.

x	Q, Search	Clents / Clent Case Notes				🥦 A 🛛 🕫
3 ?	(CSA) Stanislaus County Community Services Agency _Modesto Users 2020	Jasper King 8/15/1991 Man (Boy, if child) 53033 Client Case Notes	< Ø			
•	_Modesto Users 2020	The client's case note history displays below.	To create a new case note, click Add New Ce	se Note. To view or edit a case note, click Edit C	ase Note next to the record. To preview and print case notes, check the Print box next to one or more cas	e notes, and then click Print Selected. + Add New Case Note Print Selected
۰.	Client Dashboard					
\$	ta Intake				1 result found.	A
"	Day Center Entry	Date I!	Regarding	User	Organization	Print
	v 🚊 Profile	10/28/2024	Obtained BC	Stephanie Hand	(CSA) Stanislaus County Community Services Agency	
	Edit Client					
	3 Alias History					
	Address					
	History Case Managers	View/Edit case not	os horo			Select the note(s) you
	Case Managers	view/Eurcease not	es nere			wish to print and select
	Client Files					
	Current Living Situation					Print Selected
	FE Document Check					
	🚨 Family History					
	Information Release					
	Information	1				
	Release Exceptions					
	Interested Others					
	D Notifications					
	Photo					
	Let Veteran Information					
	> Common Assessments					
	> C Other Assessments					
Ø	> C Enrollment and					Canoel

Add a Current Living Situation (CLS)

Certain projects, including but not limited to Street Outreach and Coordinated Entry, require you to collect and record a Current Living Situation when you contact a client. The Current Living Situation should reflect where the client is staying now (at the moment the information was verified). This may match the client's Prior Living Situation collected at project start; however, the Current Living Situation is collected over time and may change.

Navigate to the Client's Profile to update their Current Living Situation

Q Search	Clients / Jasper King's Dashboard							1	% '	0
(CSA) Stanislaus County Community		antib 3033 4 🗰 🗅 🗅								
Services Agency	Jasper King's Dashboard									
	Jasper King's Information								ß	s -
Q Find Client										
Client Dashboard	STANISLAUS TE	ST								
Day Center Entry		Name	King, Jasper James III		Birth Dat	e: 8/15/1961		A	Age: 63	.3
Y 💄 Profile		Gender	Man (Boy, if child)							
Ledit Client										
ID Card		Client ID:	53033		Rac	 Asian or Asian American, Black, African American, or African 	i			
3 Alias History										
Address History	Jasper's Enrollme								ß	
Case Managers		te Current Liv	ing Situati	on					10	
Case Notes	opus					1 result found.				
Client Files	Enrollment Active House Description Member		Project Start Date 1	Housing Move-In Date	Project Exit Date 1	Case ID EnrollID 11 Days Enrolled Exit Destination	Organization	Last Assessed	Program	m Type
Situation	✓ Active						0. Bernander			
f≣ Document	Emergency Shelter - Entry Exit									
Check	CSA TEST ES 2	Household without Children	08/14/2024			94515 137637 5	(CSA) Stanislaus County Community Services Agency	8/14/2024	0	
Family History Information										
Release										
Information Release Exceptions	Jasper's Services								Ø	8 -
1 Interested						1 result found.				
Others		te II Service		Units	\$ Total Organizatio		Service Creation			
D Notifications	12' 1 08	16/2024 Shelter	Night	1.00	\$0.00 (CSA) Stan	islaus County Community Services Agency	08/16/2024 2:18	PM		
Photo										
Le Veteran										

Select Add a New Current Living Situation in the top right corner of the page. You will be prompted to answer the questions below. If a Current Living Situation is Temporary, Institutional, or Permanent, you will be asked additional housing status information. This will determine and verify imminent and at-risk of homelessness status based on HUD's definition of homelessness.

X	Q Search	Clients / Current Living Situation / Current Living Situation		F 4 8 00
2 ?	(CSA) Stanislaus County Community Services Agency	8/15/1901 53033	≝ □	
f E	_Modesto Users 2020	Current Living Situation		< 8
8 0	Q Find Client	Record the Clients Current Living Situation Information I Additional questions	elow. If desired record a contact by checking the Record Contact and filling out the information Information Date: *	Attach the CLS to an enrollment here. Also
☆	 Day Center Entry 	will show if		note, the date will auto-populate to today's
	Profile Edit Client ID Card	Temporary, Institutional, or	Current Living Situation:* SELECT Location Detail:	date. Update if the information date is not today's date
	 D Card Alias History Address History 	Permanent situations are selected	Record Contact:	
	Case Managers Case Notes Client Files		Ĩ	
	Current Living Situation			
	E Document Check		You can also record a contact	here
	Family History			
	Information Release			
	Information Release Exceptions			
	Interested Others			
	Notifications			
Ø	Photo Photo Veteran Information Common			Save Cancel

Once completed, you will return to the CLS screen in the previous step. You will be able to see the CLS you completed as well as and additional CLSs. **Note:** if you are only able to see your organization's entered CLSs (except for Coordinated Entry entries). For Coordinated Entry, if a CLS is not added within 90 days, the enrollment will be auto exited.

Q Search	Clients / Current Living Situation		ې ۵ 💦
County Community	Dasper King Man (Boy, if child) ClientID 8/15/1961 Man (Boy, if child) 53033 Current Living Situation	4 8 C	< e
_Modesto Users 2020			
Q Find Client	All of the client's current living situation history is d	lisplayed in the list below. To view or edit one, click	k Edit Current Living Situation to the left of the record you would like to change. If you want to add an item, click the Add New Current Living Situation button at the top of the screen.
Client Dashboard			+ Add New Current Living Situation
13 Intake			1 result found.
Oay Center Entry	Information Date	Enrollment	Current Living Situation
	B 08/19/2024	08/14/2024 - CSA TEST ES	Emergency shelter, including hotel or motel paid for with emergency shelter voucher, Host Home shelter
V A Profile	×		
iD Card			
3 Alias History			
D Address History			
Case Managers			
Case Notes	You can edit a CLS	here	
Client Files			
Current Living Situation			
f≣ Document			
Check			
Family History Information			
Release			
Information			
Release Exceptions			
Interested Others			
D Notifications			
Photo			
Veteran Information			
> Common			Canot

Add Referrals

Navigate to the Client's Dashboard and select the Enrollment and Services folder on the left-hand side of the screen. Then select Referrals. View any recorded submitted referrals on the screen. On the right-hand side of the screen, select Add New to add a new referral.

x	Q Search	Clients / Client Referrals					🅦 4 🛎 👳
*** ?	BHRS (Stanislaus County Behavioral Health & Recovery Services)	Vanessa Maciel 8/1/1980 Woman (Oirt, if child) G Client Referrals	SiantiD 53380 ♀ ⊜ C				< 9
	_Modesto Users 2020	Below is a list of all existing referrals for th Voucher next to the desired record.	ne selected client. To add a new referral for the client.	click the Add New button. To view or edit a reco	d displaying in the list, click Edit next to the desired record. To get	directions from the client's address to the prov	vider, click the on the provider's name. To print a referral voucher, click Referral
	Q Find Client						+ Add New I≣ Quick Referrals +0 Incoming Referral
-	Client Dashboard						
\$	13 Intake				No records found.		7
	Day Center Entry						Approx Distance
		Status	Service	Provider 6	Date II	Incoming	(in mi.)
	> 💄 Profile						
	> C Common Assessments						
	> 🗅 Other Assessments						6 11
	Enrollment and Services					Add	a new referral here
	 Determine Referral Eligibility 						
	C Enrollments						
	Housing Program Eligibility and Availability						
	Quick Services						
	🛓 Referrals						
	C Services						
	CE Services						
	> 🗅 RHY Assessments						
	SPDAT Assessments	Enrollme	nts and Services and				
	Coordinated Access	select Re	ferrals				
	(Read-Only)	Jeleet he	icituis				
Ø							Cancel

Change the Referral Date to the date the referral was made, if applicable. Record the Referral Service from the drop-down list. You can select the magnify glass to search the system for a provider. An enrollment must be selected to ensure the referral is attached to your reporting. A recorded barrier may also be selected to each recorded referral.

ferral Woman (Girl, If child) 53380 ↓ ↓			
Referral		Voucher and Information Release	
eferral monoton below to identify the service and the provider being referred to.		024 D nity Mental Health	The date will auto populate to the current date
referral Recipient elect the agency referral recipient as the Refer to Provider.	Refer to Provider:* Stanisla	us County Behavioral F Q	Select the magnify glass to search and enter a provider
Referral Source Select the agency referral source as the Refer from Provider.			
An enrollment must be selected	Comments:		A recorded barrier can be attached to the referral, if applicable

wee woman (Dirt. if child) 53380 Q 🖹 :			
rrai			
Beforst		Volutifier and Information Release	Referral Outcome
erral splete the information below to identify the service and the provider bei	no referred to		
	Search		
	Find Provider	< 0	
	Locate a provider by using the selection criteria belo blank and select search. To change your search, cha	w. To get a list of all providers, leave the selection criteria inge the selection criteria and select search.	
rral Recipient	Provider: BHRS	0	
ct the agency referral recipient as the Nefer to Provider.	Address:		
	City:	Select the	
	State:	provider after	
rral Source	Zip Code:	searching	
ict the agency referral source as the Refer from Provider.	Provider Type: Provider		
		Q Search	
	1	result found.	
	Provider	Address City State Code	
	Stanislaus County Behavioral Health &	800 Seenic Drive	
	Recovery Services (BHRS)	Building 4 Modesto CA 95350	
		Cancel	
	Associated Need/Barner Mental Health Disorder	(06/30/2024) *	
			20 Next

Selecting the Voucher is Authorized check box will indicate your organization has authorized a voucher for this service. Selecting the Email Authorized check box will indicate the client has authorized their information to be released to the selected provider and will send the provider an email regarding the referral.

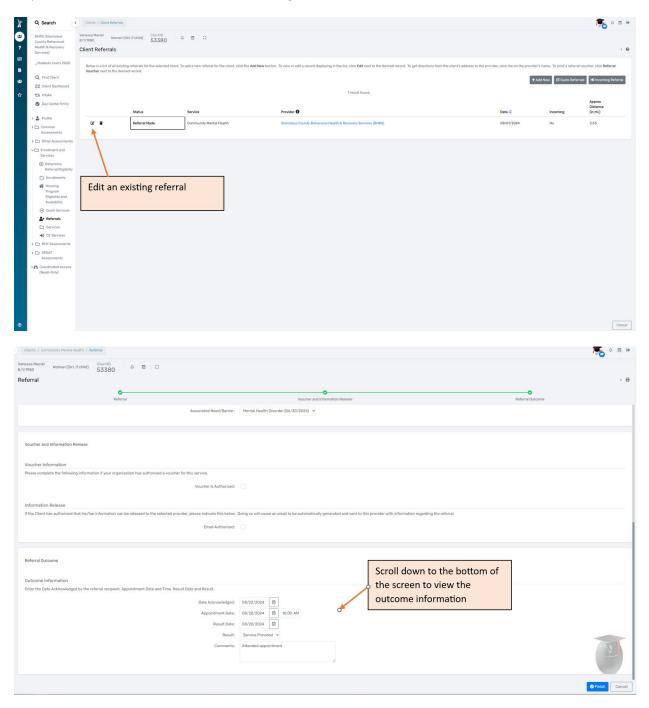
Vanessa Maciel 8/1/1980 Woman (Girl, if child) Clie 53	atio 380 4 ⊜ Ω				
Referral					< 8
	Referral		Voucher and Information Release		Referral Outcome
	<u>NE191.0</u>		vouurer allia errorinacion nerease		Reletion Guildonne
Voucher and Information Release					
Voucher Information Please complete the following information if	your organization has authorized a voucher for this service.				
	- Voucher is Authori	ad:			
		0			
Information Release					
If the Client has authorized that his/her infor	mation can be released to the selected provider, please indicate this be		be automatically generated and sent to this provider with informat	ion regarding the referral.	
	Email Authori	ad:			
					« Previous » Next Cancel
ormID=1127&PageID=2&PrimaryKey=53380&ReturnLink=http	s%3A%2F%2Fclienttrack.eccovia.com%2Fview				

The Referral Outcome does not have to be completed at the time of recording the referral. This can be edited later and will be reviewed in the upcoming section.

Vanessa Maciel 8/1/1980 Woman (Girl, if child) ClientID 53380 ↔ 🗂 🖸		
Referral		< 0
Referral	Voucher and Information Release	Referral Outcome
Referral Dutcome		
Outcome Information		
Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.		
Date Acknowledged		
Appointment Date		
Result Date Result		
Comments	- SELECITE V	
	A	
		« Previous Privat Cancel

Edit Referrals

Each recorded referral may be edited for accuracy and/or to add an outcome. Check your program and reporting requirements for additional referral outcome guidance.

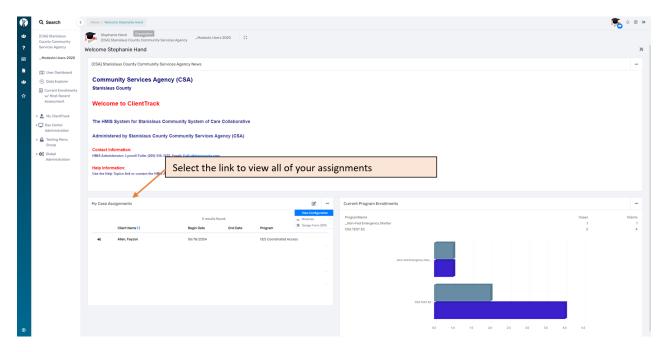


Case Manager Assignments

Case Manager screen shows a history of the client's case managers. The assigned case manager inside ClientTrack is the HMIS user assigned to that client's enrollment in a given program. A client can have multiple case managers assigned to their enrollment(s). The case manager is automatically assigned to the HMIS user completing the intake assessment for a client. **Note:** the assigned case manager must have HMIS access and be an HMIS user.

View

You can view all of your current assignments. Start on the Home Dashboard. From here you can see your current Case Assignments. **Note:** the clients shown here are only clients that have an active case manager assignment attached to you.



You can also view it on the client level. Start on the Client's Dashboard and select the Profile folder on the lefthand side of the screen.

	Clients / Quick Service / Jan	per neg a case a const									%	1
(CSA) Stanislaus County Community	Jasper King 8/15/1961 Man (Boy, if chil	d) ClientID 0	a 0									
Services Agency	Jasper King's Dashbo	ard										
_Modesto Users 2020	Jasper King's Informatio	n									12	s
Q Find Client												
Client Dashboard	STANISLAU	S TEST										
Day Center Entry			Name: King.	Jasper James III		Birth Date:	8/15/1961			Age	e 63	
Profile			Gender Man	(Boy, if child)								
Ledit Client			Client ID 5303			Race	Asian or Asian American. Black. African American. or African					
D Card			Client ID 5503	55		Race.	Asian or Asian American, black, Amican American, or Amican					
3 Address		Select (ase Manage	ors								
History	Tesper's Enrollments	Sciette	ase manage	CI3							6	
Case Notes						11	result found.					
Case Notes		Active Household										
Client Files	Description		shold Type	Project Start Date 1	Housing Move-In Date Project Ex		result found. Case ID EnrollD II Days Enrolled Exit Destination	Organization	Last	t Assessed F	Program	
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Add Case Management Assignment

Q Search	Clients / Case Manager	Assignments					
(CSA) Stanislaus County Community	Jasper King 8/15/1961 Man (Boy, I	if child) ClientID ↓ 🗎 😂					
Services Agency	Case Manager Ass	signments					
_Modesto Users 2020							_
Q Find Client	The Client's history of a	assigned Case Managers displays below. To view or edit	a Case Manager assignment, click the Edit nex	t to the record. To add a new Case	Manager assignment, clic Ad	d a new Case Assignmer	nt gers, click Ca
Client Dashboard							
tl Intake					5 results found.		
Day Center Entry		Case Manager	Begin Date 1	Status	End Date	Enrollment	
v 🛔 Profile	8.	Stephanie Hand	08/14/2024	Active		CSA TEST ES	
Edit Client	C.	Lynnell Fuller	07/26/2024	Active		CCD SSVF HP	
Alias History	ß	Wally Lugo	08/30/2023	Active		WE CARE WINTER SHELTER	
Address History	8	Teresa Brockman	08/15/2023	Active		CHSS HDAP RRH	
Case Managers	ß	Farris Geter	09/29/2022	Inactive	09/23/2022	WE CARE WINTER SHELTER	
Client Files							
Current Living Situation							

Select Add Case Assignment on the right-hand side of the screen.

Select the date the case assignment will begin. An end date is not needed if the assignment is indefinite. There must be an active enrollment. Ensure the status is Active.

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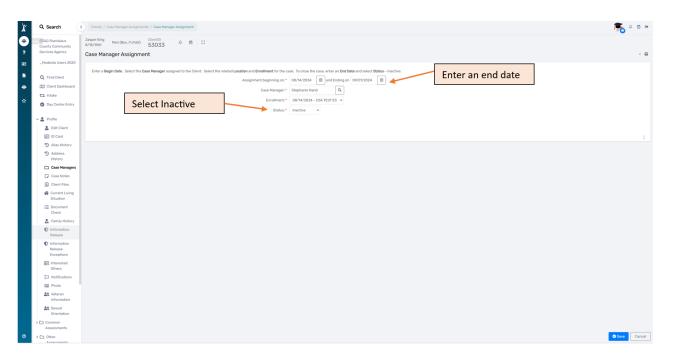
(CSA) Stanislaus County Community	Saver King Man (Boy, if child) Saver Sa	
	Case Manager Assignment	
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 Q. Find Client [1] Client Dashboard 1] Intake Ø Day Center Entry 	There a Buget Date. Select the Case Manager assigned to the Client. Easter the actuation out forwhere of the box and in client black. Hence, where an the date is a matching and indicating and indicati	
	enrollment Status* Active v	
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ID Card		
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Information Release Exceptions		
Interested Others		
D Notifications		
Photo		
Le Veteran Information		
Sexual Orientation		
Common Assessments		
> 🗀 Other		Save Ca

Edit a Case Manager Assignment

Select the edit button next to the case manager assignment you wish to edit.

	Clients / Case Manager Assignm						
County Community	Jasper King B/15/1961 Man (Boy, if child)	53033					
	Case Manager Assignm	ients					× 0 B
_Modesto Users 2020	C 1	Anners disclays helow. To view or edit	a Case Manager assignment, click the Edit new	to the record. To add a new Case	Mananar assignment, click the Arid Ca	se Assignment. To print a list of the Client's history of assigned cas	a mananara dirk Casa Mananara Banort
Q Find Client	Select to Ed	It it	a case Hanager assignment, citic the partner	t to the record. To and a new case	ranager assignment, order the Aut Ce	se Assignment. To print a not or the Grent's motory of assigned cas	+ Add Case Assignment 🖥 Case Mana
Client Dashboard							
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Day Center Entry	+	Case Manager	Begin Date 11	Status	End Date	Enrollment	Enrollments
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S Address History	ß	Teresa Brockman	08/15/2023	Active		CHSS HDAP RRH	Ø
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Li Interested Others							
D Notifications							
Photo							
Veteran Information							
Sexual Orientation							
Common Assessments							
D Other							

Enter the date the case manager assignment has ended. Mark the status to inactive.



During Program Enrollment Update & Annual Assessment

During Program Enrollments: Completed to capture changes to the client's Health Insurance, Income, Domestic Violence, Barriers, or Move-In Date. For children, you will be asked to update their Health Insurance and Barriers. This must also be completed for any child who turns 18 during the enrollment. Additional information will be asked including Prior Living Situation, Veteran Status, and Income.

Annual Assessments: Must be recorded if an individual and/or child has been enrolled in the project for 365 days or more. This must be completed 30 days before or 30 days after the anniversary of the Head of Household's project start date. **Note:** HUD-funded programs and for HUD reporting purposes, the "annual assessment" is MANDATORY.

Begin on the client's Dashboard and select the action button on the enrollment you would like to complete the update.

Q, Search	Clients / Jasper King's Dashboard		🕵 4 🗎
(CSA) Stanislaus County Community	Susper King Han (Boy, if child) Clientitio 8/15/1961 53033 0 10		•
Services Agency	Jasper King's Dashboard		
_Modesto Users 2020	Jasper King's Information		ß, -
Q Find Client			
🖽 Client Dashboard	STANISLAUS TEST		
Day Center Entry	Name King, Jasper James III Birth Date 8/15/1961		Age: 63
Profile	Gender: Man (Boy, if child)		
Common Assessments	Client ID: 53333 Race: Asian or Asian American, Black, African American, or African		
Other Assessments			
Enrollment and Services RHY Assessments	Jasper's Enrollments		ß.
SPDAT Assessments	Trest found.		
Coordinated Access (Read-Only)	Description Members Household Type Project Start Date II Housing Move-In Date Project Exit Date II Case ID EnrollD II Days Enrolled Exit Destination	Organization Last Assess	ed Program Type
	 ✓ Active ✓ Emergency Shelter - Entry Exit 		
	CSA TEST ES 2 Household without Children 0014/2024 94515 137637 5 Kd3 Household Member	(CSA) Stanislaus County Community Services Agency 8/14/2024	0
	Q Associated Assessments		
	Ja: @ Edit Envelment		R, -
	Edit Project Entry Workflow Assessments are both updated here Assessments are both updated here		
	D Update/Annual Assessment Service Units \$Total Organization	Service Creation Time	
	Bolete Errollment Controllment Source Standard Control Community Services Agency Service Standard Control Community Services Agency	08/16/2024 2:18PM	

You see the Enrollment Screen; showing you who is currently in the enrollment. After you select No Changes, you will be asked to select the type of Assessment. Select the appropriate Assessment. **Note:** Each assessment asks different questions. Please ensure you have selected the appropriate Assessment. This screen will only show if you have never completed an Update Assessment for the client.

X	Q Search	Cients	↓ □ ↔
3 2	(CSA) Stanislaus County Community Services Agency	Assessment For Jarger Ing Man (Boy, if child) Classific 53033 A Classific Classific Classific Action Classific Class	
	_Modesto Users 2020	© Envilment	
8	Q Find Client	Note: if you have more than one individual	
424	Client Dashboard	© Type of Assessment enrolled in the project, you will be asked if you	
☆	13 Intake ⊘ Day Center Entry	would like to complete an assessment for all members of the Household	
	> 🚨 Profile	- Polites	
	Common Assessments	II Pause X Cancel	
	> 🗅 Other Assessments		
	> Enrollment and Services		
	> 🗅 RHY Assessments	New During Program Enrollment/Update	
	> 🗅 SPDAT Assessments	Type of Assessment	
	➤ A Coordinated Access (Read-Only)	New Annual Assessment	
		Select the appropriate type of assessment	
Ø			

During Program Enrollment Update

You will complete the following information for a During Program Enrollment Update. **Note:** You can default to the client's last assessment if there has been no change (e.g. the client's health insurance has not changed since their last assessment).

Universal Data Assessment:

Jasper King Man (Boy, if child) ClientID ↓ ▲ ▲ ▲ □ 8/15/1961 53033 ↓ ▲ □ □						
Universal Data Assessment (FY24)						× 0 5 8 0
Complete the information below related to the selected client's housin enrollments may affect or break the logic for 3.917.3.917 may not alway		equired data links	entry as described in the Data E ast Assessment	Dictionary, the Default Last Assessment button	will not bring in any 3.917 data. Changing any project setup da	ita with existing
	Assessment Date* 10/28/2024 Age at Assessment: 63 Assessment Type: During Program Enrol Program: CSA TEST ES	iment/Update v	v			
Health Insurance Please indicate whether or not the client is covered by health insuranc	e. If so, you will be able to record health insurance sources for the Covered by Health Insurance.* Ves Type	e client. Default Last In V Status	surance Status Reason No O	Other Coverage		
	Private Pay Health Insurance	Yes	~		c	
	Medicare	No	SELECT	~	c	
	Medicaid	No	SELECT	*	c	
	Health Net (Medi-cal) - Adults	No	SELECT	~	с	
	Health Net (Medi-cal) - Children	No	SELECT	*	c	
	Health Plan of San Joaquin (Medi-cal) - Adults	No	SELECT	~	c	
	Health Plan of San Joaquin (Medi-cal) - Children	No	SELECT	~	°	
	State Children's Health Insurance Program (Medi-cal)	No	SELECT	~	c	
	Veteran's Health Administration (VHA)	No	SELECT	×	C	
						Save

Barrier Assessment:

Jasper King 8/15/1961	Man (Boy, if child) ClientID 53033	¢ e	0							
Barriers										< 6
Use this	form to identify whether a client has	each individual I	barrier or not. The C	Identified Date:* Screen:	10/28/2024 Special Needs V	optionally, click Previous I Assessment Active		bout the defaulted records or click View	Barrier History to review all previous barriers.	Barrier History
	Barrier 11	Help	Barrier Present?*	Disabiling Condition:	Yes Condition is Indefinite	×	Explanation		Previous Barrier Details	
	Alcohol Use Disorder	۲	No	v					Previous Barrier	c
	Chronic Health Condition	•	No	v					Previous Barrier	c
	Developmental Disability	٢	Yes	•					Previous Barrier	c
	Drug Use Disorder	۲	No	•					Previous Barrier	c
	HIV/AIDS	۲	No	~					🥪 Previous Barrier	c
	Mental Health Disorder	Ø	Yes	×	Yes	~			Previous Barrier	c
	Physical Disability	۲	No	•					Previous Barrier	c

Domestic Violence Assessment:

Jasper King Man (Boy, if child) ClientID ↓		
Domestic Violence Assessment		< 🖶
If the client is a survivor of domestic violence, select Yes for Survivor of Domestic Violence, and select when the ex	perience occurred. Default Client's Last Assessment	
	Assessment Active	
Assessment Date:* 10	3/28/2024	
	Yes No Client Deen't Know Client prefers not to answer Data Not Collected	
When Experience Occurred:* V	Within the past three months 🗸	
Currently Fleeing:* N	io v	
		E.

Income and Sources:

dicate below the following ins • When a clie • Income re members. of the sour • Income da would be *	Sources, Non-Cash Benefits the client's sources of monthly income, non-cash benefits and expense. this functions are quoted from the HMB Data Minual the hair income, but does not know the exact amount, a "tes" response should be recorded as part of household none under the Project may choose to collect this information for all household members including minor chut, as a should be recorded as provided as the sources of nones they readow. Tak: As further example, if a direct the be sources of nones they readow. Tak: As further example, if a direct the sources of nones they readow. (6.20 hours at \$12,00 un houd).	e Head of Household, unless dren, as long as this does no. . have not been specifically th the client was working ful	s the federal funder in the HMIS Pr of interfere with accurate reporting terminated). As an example, if a cl	rogram Specific Manual instructs otherwise. Income should be recorded at t g per funder requirements. Projects collecting data through client interview filent's employment has been terminated and the client has not yet secured	is should ask clients whether they receive income from each additional employment, the response for Earned income
 be following ins When a clie Income reimembers. of the sour Income da would be " 	structions are quoted from the HHIS Data Manual: left hai norms, but does not know the exact amount, a "tes" response should be recorded for both the project by on on behard of a minor child bound be recorded as part of household income under the . Project may choose to collect this information for all household memore here including minor child use is lated rather than safety them to state the sources of income they records. It is the hold the transmip, if a client's the sources of income they records (i.e. 20 hours at 512.00 an hour). Assessment Dates *	e Head of Household, unles dren, as long as this does no. have not been specifically h the client was working ful 10/28/2024	s the foderal funder in the HRISP to therefore with accurate reporting terminates). As an example, if a classification of the for titime for StS 00/hour, but the clie Default Last Assessment Assessment Active	rogram Specific Manual instructs otherwise. Income should be recorded at t g per funder requirements. Projects collecting data through client interview filent's employment has been terminated and the client has not yet secured	is should ask clients whether they receive income from each additional employment, the response for Earned income
icome	Non-Cash Benefits from Any Source!* Expanses:	SELECT Description	~ 0 ~ 0	Monthly Amount	
	Earned Income	Disciption		\$2,000.00	2
_				\$2,000.00	5
0	Unemployment Insurance				
S	Social Security Insurance				
s	Supplemental Security Income				
0 s	Social Security Disability Income				
P	Private Disability Insurance				
	Count/Total Monthly Income:		1	\$2.000.00	

Save and Close and select Finish to complete the assessment. **Note:** You must complete assessments for the entire household and complete the workflow to save the information.

Annual Assessment

Annual Assessments record different data elements than the During Program Enrollment Update. Once you select Annual Assessment, begin to enter the information below.

Universal Data Assessment:

Ruby Schultz 2/17/1987 Woman (Girl, if child) ClientID 53411 A M	D				< 0
Universal Data Assessment (F124)					
Complete the information below related to the selected client's housin enrollments may affect or break the logic for 3.917.3.917 may not alway				e Default Last Assessment button will not	bring in any 3.917 data. Changing any project setup data with existing
	Assessment Date: * 11/01/2024				
	Age at Assessment: 37				
	Assessment Type: * Annual	~			
	Assessor:* Stephanie Hand	٩			
	Program: CSA TEST ES		~		
Health Insurance					
Please indicate whether or not the client is covered by health insurance	ce. If so, you will be able to record health insurance sources for t	he client.			
		Default Last Insur	ance Status		
	Covered by Health Insurance:* Yes	~			
	Туре	Status*	Reason No 🟮	Other Coverage	_
	× Private Pay Health Insurance	No 👻	SELECT		
	× Medicare	No v	SELECT		
	× Medicaid	No v	SELECT	-	_
	× Health Net (Medi-cal) - Children	No v	SELECT		
	× Health Net (Medi-cal) - Adults	No v	SELECT		
	 Health Plan of San Joaquin (Medi-cal) - Children 	No Y	SELECT	•	
	× Health Plan of San Joaquin (Medi-cal) - Adults	Yes 🗸			
	× State Children's Health Insurance Program (Medi-cal) No ~	SELECT	•	
	× Veteran's Health Administration (VHA)	No v	SELECT		
					Save Save No Changes

Income and Sources:

Trollinet * 20/10/Web S24/11 1263.0 Income and Sources, Non-Cash Benefits Droutinet * Sources, Non-Cash Benefits Origination * Annual Assessments Indicate below the client's sources of monthly income, non-cash benefits and expenses. Origination * Annual Assessments Indicate below the client's sources of monthly income, non-cash benefits and expenses. * The following inductions are quicked from the HBS Data Hanual: * Annual Assessments * Annual Assessments • Indicate below the client's sources of nonthly income, non-cash benefits and expenses. * The following inductions are quicked from the HBS Data Hanual: • Indicate below the client's expenses should be incorted for tooth the source income should be estimated. • Indicate below the client's expense should be monted as part of none-cosh of tooth the source income should be estimated. • Indicate below the client's expense should be monted as part of none-cosh of tooth the source income should be estimated. • Indicate below the client's expense should be monted as part of none-cosh of tooth the source income should be estimated. • Indicate below the client hanual income should be monted as part of none-cosh of the source income should be estimated. • Indicate below the client hanual income should be recorded at the client hanual income should be recorded	Clients				😽 4 E	3 0
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	★ Annual Assessments ④ Income	The following instructions are quoted from the IMBE Data Manuari. I. Wina a client has income, but does not hnow the exact amoutt, a "we" reprove thousehold income under the induced one of the	he Head of Hous ildren, as long as e. have not been iich the client war 11/01/2024 No No	Lehold, unless th a this does not in a specifically term is working full tin () () () () () () () () () ()	e federal funder in the HMB Program Specific Hanual instructs otherwise, honore should be recorded at the elemi-level for heads of household and adult household there with accurate regording per funder requirements. Provide calcelling data through clinit interviews included ack dates whether througe who more from ele- minated. As an example, if a client's employment has been tarminated and the client has not tyst accurate additional employment, the response for Earned income ne for SRL Dorhour, but the client is currently working 20 hours per week for SR2.00 an hour, record the income from the job the client has at the time data are configured Last Accessment: Assessment Active • 0	ach
		Epennee	+ SELECT +		• 0	

Updating Existing Assessment

If you have completed an Update Assessment for the client before, you will first be asked if you would like to a New Assessment or Edit Existing assessment.

)ř	Q Search	Clients			🥦 4 🛎 🕫
2 2	(CSA) Stanislaus County Community Services Agency	Assessment For 344007 King Man (Boy, if child) 53033 △ C Enrollment * 8/76/7941 Man (Boy, if child) 53033 △ C			
	_Modesto Users 2020				
	Q Find Client	✓ ★ King, Jasper James			
	(1) Client Dashboard	New or Edit Existing			
ŵ	12 Intake O Day Center Entry	- Assessment > O Loper King, Jesus Michael			
	v 💄 Profile	> Ó King, Kimberly			
	Ledit Client	III Pause × Cancel			
	Alias History				
	3 Address History				
	Case Managers				
	Case Notes				
	Client Files	New or Edit Existing As	sessment	New Assessment	
	Situation	for this Client are you			
	E Document Check			Edit Existing	
	Family History				
	Information Release				
	Information Release Exceptions				
	Interested Others				
	D Notifications				
	Photo				
	Veteran Information				
	> 🗅 Common Assessments				
	> 🗅 Other Assessments				
۲	> C Enrollment and				

To edit an existing assessment, you will be asked to select the appropriate assessment you wish to edit. Select the assessment.

Q Search	Clients							1	🥦 o 🖻
(CSA) Stanislaus County Community Services Agency	Enrollment *	Jasper King 8/15/1961 Man (Boy, if child) ClientID 53033 Find Assessment	0 m C						
_Modesto Users 2020	Enrollment	Find Assessment							
Q Find Client	✓ ★ King, Jasper James III	Pite Assessment		Type: SELECT	~				
Client Dashboard	 New or Edit Existing Assessment 			Assessor:	٩				
 Day Center Entry 	 Find Existing Assessment 								Q Searc
🛩 🚊 Profile	 O Lopez King, Jesus Michael 	Date 41	Туре		1 result found.	Program	Assessor	Comments	
🚊 Edit Client	> O King, Kimberly	08/19/2024	During Program Enrollment/Update			CSA TEST ES	Stephanie Hand	comments	
ID Card	Pause × Cancel	000172024	borng rog on chomens opare			004720720	otophone nono		
Alias History									
Address History									
Case Managers									
Case Notes									
Client Files									
Current Living Situation									
E Document Check									
2. Family History									
Information Release									
Information Release Exceptions									
Interested Others									
D Notifications									
Photo									
Veteran Information									
Assessments									
Assessments									
Enroliment and									

You will go through the entire workflow to make the necessary change. Make sure you complete the entire workflow or this may cause data quality issues.

Update PATH Enrollment Adding Engagement Date or PATH Enrolled

Start on the Client Dashboard and select the action button next to the enrollment you wish to add the information. Select Update/Annual Assessment.

HRS (Stanislaus ounty Behavioral	Veneral Skolal Morran (Bkr, (richt) 5338) 0 B ::		
salth & Recovery arvices)	Vanessa Maciel's Dashboard		
Modesto Users 2020	Vanessa Maciel's Information		ľ
Find Client	STANISLAUS TEST		
Day Center Entry Profile Common Assessments Other Assessments	Name Model Variests Maria Bitth Date 0/17980 Gender Variana (Siris if divid)	Age:	44
) Enrollment and Services	Vanessa's Errollments		ľ
RHY Assessments SPDAT Assessments Coordinated Access (Read-Only)	Tresult found. Errolment Active Household Type Project Start Date II Housing Move-in Date Project Exit Date II Case ID Errollio II Days Errollio E Dit Destination Digunization o	Last Assessed	Program
	enviros uny enviros uny	6/30/2024	6
	Val 22 Edit Enrollment		ß
	Valid 2 and knownedd If and knownedd 1 and knownedd Strike Organization Service Organization		

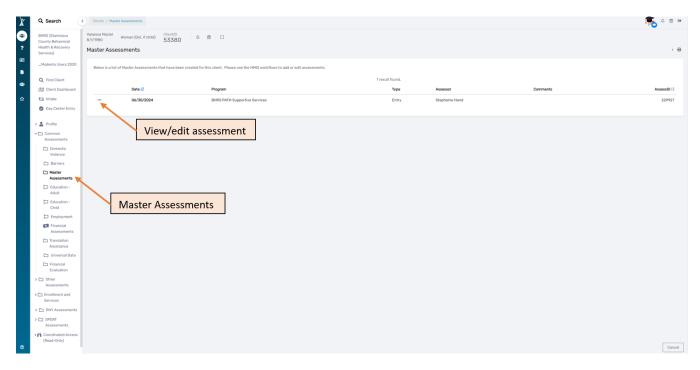
On the Enrollment screen, you make any changes to the Date of Engagement, Date PATH Status Determined, and/or Client became enrolled in PATH. You will then continue through the entire workflow. **Note:** Do not change the Project Start Date.

0	Clients / Vanessa Maciel's	Dashboard														Г с е е
Er (1:	sessment For rollment # 263)	Vanessa N 8/1/1980 HUD P	Woman (Girl, rogram Enrollm	55580)	4 🗎 🖸										< 0
•	Enrollment Peuse X Cancel	Selec Clien Pleas The I	the Project you are e truck will eligibly a list a select all the clients Prof Street Outmach. For Street Outmach. For Street Outmach. For all types of Perm 1. Information pro- bein gathered 2. The client his a 5. The client his a For all other types of Port all other types of	enrolling the client into of clients in the clien you are enrolling. arojects – it is the data ere – it is the right the field period. Transitional Housing, includ anent Housing, includ ovided by the client or indicated they want is do a access service projects inclu	of first i of first i of lient fi it is the ng Rapic from the be hous and hous ding but	contact with the client. It stayed in the shelter fit date the client moves in the date the client moves in the description of the shelt of the referral indicates they m ed in this project ing through the project. In the project is not limited to: services of the services of the services of the services of the services of the services of the services of the services of the service	to the residential project the tate following application i teet the criteria for admis The expectation is the pro- hy, day shelter, homeless Project:	(i.e. first night in residence), that the client was admitted only projects with a vaid HV Due to the large number of o change a project once the or change a project once the or while creating the enrolment of members are selected. The particular members are selected.	l into the project Typ anditional def rollment reci ty you will see roject field ca Services	oject. To be admitted in the appear here. a collection elements it is if the project field disabled win the broken the changed when no how E	idicates th not possible vhen house usehold live togeth	he following factors has the phave a serious of se to Update	ve been met: disability and have been h	mation an	to re-enter as necessary without "exit to qualify - though all documentatic ind select Save d live together in one dwelling unit if the Reason not enrolied in PATH	ing and restarting" for an may not yet have
																Save Vo Changes

View and Edit Master Assessment

A Master Assessment ties several separate, detailed assessments/data elements to a single process at a particular point in time. Master Assessments are normally created during Workflow. A Master Assessment is needed to run a HUD APR, so it is important this element is recorded and correct.

Start on the client's dashboard and select Common Assessments from the left-hand side of the screen. Then select Master Assessments. View and edit any recorded Master Assessments from this screen.



You can see the details of the recorded Master Assessment and each detailed assessment attached to the Master Assessment. Select the assessment you wish to view/edit. To edit the Master Assessment date, select Edit Assessment on the right-hand side of the screen.

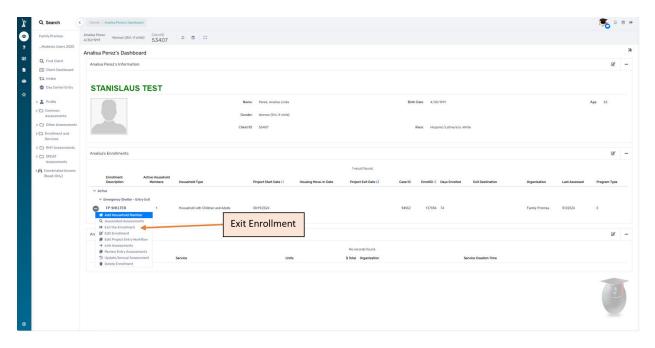
Clinits / 4/30/2024 Entry / Assessment Status Vanessa Maclel Woman (Girl, If child) ClientID 53380 Q □ 13				🍋 A 🛱 🕪
Assessment Status				*
	Details ■ June 30, 2024 ■ BHRS PATH Supportive Services ■ Entry ▲ Stephanis Hand	Progress (RHY and PSH) RHY Entry Assessment 19483 Barriers Domestic Violence Financial	4 of 5 Conglete Conglete Conglete Conglete	Edit Master Assessment Date here
Select approp assessment	priate			×000

Edit Master Assessment dates to clear Data Quality date errors.

Clients / 6/30/2024 Entry / Assessment Status / Master Assessment	🥦 A 🛎 🕫
Vanessa Maciet a/t/1980 Voman (Birl, If child) ClientID A 🗇 🗇 🖸	
Master Assessment	< ⊖
A Master Assessment record lies together a number of separate, detailed assessments/data elements to a single process. For example, if you are creating an Entry Type Master Assessment, the data elements you record while this assessment is active will be tied to the entry.	
Program* BHRS PAITH Supportive Services Assesson* Stephanie Hand Q	
Comments If you have any other o needed Comments:	
	Save Cancel

Exit Enrollments

When a client has transitioned from your project or is no longer receiving services for any reason, you will exit the client form your project in ClientTrack If you are exiting an entire household, start from the head of household client's Dashboard. If you are only exiting one member from the enrollment, review Exit Only One Household Member from An Enrollment. Select the Action Button from the enrollment you wish to exit and select Exit the Enrollment.



Enter the Exit Date, Destination, and End Case Assignment. End Case Assignment will remove the client from your Active Case Assignments located on the User Dashboard. An Exit Reason can be completed, however, it not a required field.

Clients / Analisa Perez's Da	shboard					🍢 ¢ 🛱 🕪
Exit * (2297/1B582)	Analisa Perez Woman (Girt, if child) ClientID A ⊕ C 4/50/1991 AG C C ClientID A ⊕ C C Enrollment Exit (2024)		The da	ite will auto popu	late to	< 8
Exit Enrollment Exit Assessments Pause × Cancel	To exit the client from the Enrolment, enter the Exit Date and Destination.	Exit Date: * 11/01/2024 Destination: * Rental by client, no ongoing housing sub Exit Ressor: Completed Program Case Manager Assignment: Stephenie fam (End Case Assignment: 20 0	the cu	rrent date		
	Services					
		Family Income: No Recent In Family Memb	ers 2			
	ny services led only on the	Poverty Leve	\$1.703.33			
date o		Enrollment:* 08/19/2024 - FP SHELTER V				
	Service*12	Displaying 1	200 of 269 results. Next Last Unit Type	Units*	Unit Value*	Total
	Abatment		Count 🗸	1.00	\$0.00	\$0.00
	ACES		Count 👻	1.00	\$0.00	\$0.00
	Adult Protective Services		Count 🗸	1.00	\$0.00	\$0.00
	Ageis		Count 🗸	1.00	\$0.00	\$0.00
	Aging & Vet		Count 🗸	1.00	\$0.00	\$0.00
				0.00	\$0.00	S0.00

Check the Assessment Date and ensure it matches your exit date. You may Default the Last Insurance Status if there are no changes.

Analisa Perez 4/30/1991 Woman (Girl, if child) ClientID 53407	0				
Universal Data Assessment (FY24)					< 0
Complete the information below related to the selected client's housing enrollments may affect or break the logic for 3 970. 3 970 may not alway the logic for 3 970. 2 970 may not alway exit date to the selected client's below the logic for a set of th				a Dictionary, the Default Last Assessment button will not Default status if there are no changes	bring in any 3.917 data. Changing any project setup data with existing
Please indicate whether or not the client is covered by health insurance	e. If so, you will be able to record health insurance sources for the	e client.			
	Covered by Health Insurance:* No	Default Last Ins	urance Status		
	Туре	Status	Reason No 🕄	Other Coverage	
	Private Pay Health Insurance	No	SELECT	~	
	Medicare	No v	SELECT	~	
	Medicaid	No	SELECT	~	
	Health Net (Medi-cal) - Adults	No	SELECT	~	
	Health Net (Medi-cal) - Children	No v	SELECT	~	
	Health Plan of San Joaquin (Medi-cal) - Adults	No	SELECT	*	
	Health Plan of San Joaquin (Medi-cal) - Children	No v	SELECT	~	
	State Children's Health Insurance Program (Medi-cal)	No v	SELECT	~	0
	Veteran's Health Administration (VHA)	No	SELECT	v	
					Save

The Barrier Assessment is defaulted from the last assessment. Verify the information for accuracy or changes before continuing.

Barriers / Special Needs Income Pause X Cancel			Identified Date: * Screen: Disabling Condition:	11/01/2024 Special Needs Yes	8	ssessment Active				w Barrier Histo
	Barrier 1 *	Help	Barrier Present?*		Condi Indefi		Explanation	Prev	ious Barrier Details	
	Alcohol Use Disorder	۲	No					~	Previous Barrier	э
	Chronic Health Condition	۲	No					× 1	Previous Barrier	0
	Developmental Disability	۲	No					~	Previous Barrier	С
	Drug Use Disorder	۲	Yes		No	*		~	Previous Barrier	0
	HIV/AIDS	۲	No					~	Previous Barrier	5
	Mental Health Disorder	۲	Yes		Yes	~		v	Previous Barrier	5
	Physical Disability	۲	No					 Image: A set of the set of the	Previous Barrier	c

Enter the client's Income Sources & Non-Cash Benefits. You may Default the Last Assessment if the information is accurate and up to date.

HUD Program	Analisa Perez 4/30/1991 W	oman (Girl, if child) ClientID ↔ 🖀 🕄								
	Income and S	ources, Non-Cash Benefits					< 🖶			
⊘ Exit Enrollment										
🛩 🌟 Exit Assessments	Indicate below t	he client's sources of monthly income, non-cash benefits and expenses.								
Barriers / Special Needs Income Pause X Cancel	The following instructions are apolled from the HMI DBA Manual: • When a eliterative traver is apolled for the HME DBA Manual: • When a eliterative traver is apolled for the HME DBA Manual: • Income include by a polled for the HME DBA MANUA: • Income include b									
			c c	efault Last Assessment						
				Assessment Active						
		Assessment Date:*	11/01/2024							
		Income from Any Source:*	Yes	0						
		Non-Cash Benefits from Any Source:*	Yes	0						
		Expenses:	SELECT	. 0						
	Income									
		Type 12		Description		Monthly Amount				
		Earned Income				\$1.596.80 9				
		Unemployment Insurance								
		Social Security Insurance								
		Supplemental Security Income								
		Social Security Disability Income					0			
		Private Disability Insurance								
			Count/Total Monthly Income:		1	\$1,596.80				
ine=top&SecondaryKey=&PrimaryKey=	:=						Save and Close			

Select Finish to complete your workflow and exit the client.

Analisa Perez 4/30/1991	Woman (Girl, if child)	ClientID 53407	4 ē	a ()		
				You're done! All required steps have been completed.	Close the workflow	

Unique Project Requirements at Exit

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

- 1. Rapid Rehousing Enrollment (RRH)
- 2. Homeless Prevention (HP)
- 3. Street Outreach (SO)
- 4. Runaway and Homeless Youth Enrollment (RHY)
- 5. Projects for Assistance in Transition from Homelessness (PATH) Enrollment

Rapid Re-Housing Exit (RRH)

The Exit Workflow will provide you an opportunity to enter a Move-In Date.

Search	Clients / Ryan Arroyo's Das	ihboard									<u>ج</u>
Community Housing Ind Shelter Services Modesto Users 2020	Exit * (2297/1B582)	0) 10) 1001	Man (Boy, if child) 53415 4 B Clentin 53415 53415								
Q. Find Client	Exit Enrollment Exit Assessments	To suit the s	client from the Enrollment, enter the Exit Date and Destination.								
Client Dashboard	U Exit Assessments	TO EAL OFE C	sent nom the enrolment, enter the Ext bate and bestmadur.	Exit Date:*	10/31/2024						
D Criefic Dashobard	Pause × Cancel			Destination:*		angoing housing subside					
Day Center Entry					SELECT						
				Case Manager Assignment:							
Profile				End Case Assignment:							
Common Assessments				City on a Anglinant							
Domestic Violence						6. U			You can capture	a a missod	
Barriers				Housing Move-in Date:*	MM/DD/YYYY	0					
C Master		Services							Housing Move-	In Date here	
Assessments		Services									
Education - Adult					Family Income:						
D Education -					Income Family In	come Family Mem	pers Poverty Leve	el % of Pov	verty		
Child Employment					\$0.00 \$0.00	1	\$1,255.00	0.00 %			
Financial				Service Date:*	10/31/2024						
Assessments				Grant:	SELECT						
Translation											
Assistance				Enroliment:*	10/01/2024 - CHSS	MOD ARPA RRH 👻					
Assistance				Enrollment:*		MOD ARPA RRH 👻 Displaying 1-20		ext Last			
Assistance Universal Data Financial Evaluation			Service" 1:	Enrollment:*		Displaying 1-20		ext Last	Units*	Unit Value*	Total
Assistance Universal Data Financial Evaluation Other Assessments			Service*11 Abstment	Enrollment:*		Displaying 1-20) of 264 results. Ne	ext Last	Units*	Unit Value* S0.00	Total S0.00
Assistance Universal Data Financial Evaluation				Enrolment:*		Displaying 1-20) of 264 results. Ne	ext Last			
Assistance Universal Data Financial Evaluation Other Assessments Enrollment and Services RHY Assessments			Abstment ACES	Enrolment:*		Displaying 1-20	D of 264 results. Ne Unit Type Count v Count v	ot Last	1.00	\$0.00 \$0.00	\$0.00 \$0.00
Assistance Universal Data Financial Evaluation Other Assessments Enrollment and Services			Abstment ACES Adult Protective Services	Enrolment:*		Displaying 1-20	D of 264 results. Ne Unit Type Count v Count v Count v	ext Last	100 100	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00
Assistance Universal Data Universal Data Financial Evaluation Other Assessments Finrollment and Services RHY Assessments SPDAT Assessments Coordinated Access			Abstment ACES	Envolment.*		Displaying 1-20	D of 264 results. Ne Unit Type Count v Count v	ext Last	1.00	\$0.00 \$0.00	\$0.00 \$0.00
Assistance Universal Data Financial Evaluation Other Assessments Enroliment and Services RHY Assessments SPDAT Assessments			Abstment ACES Adult Protective Services	Envolment:*		Displaying 1-20	D of 264 results. Ne Unit Type Count v Count v Count v	ext Last	100 100	\$0.00 \$0.00 \$0.00	\$0.00 \$0.00 \$0.00

Homeless Prevention (HP)

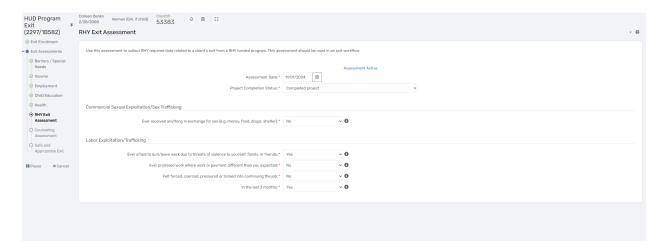
Homeless Prevention projects will have all Universal Exit questions, in addition to the Housing Assessment at Exit Assessment.

X	Q Search	Clients		🍋 с 🖻 е
æ ?	Senior Advocacy Network	HUD Program Exit * (2297/1B582)	Devo Bale Multiple-Gendar State State Care Care Care Care Care Care Care Car	< 8
	_Modesto Users 2020	⊘ Exit Enrollment		
- ■	Q. Find Client IT Client Dashbarat L. Initial O Day Center Entry > Drots > Orner Assessments > Other Assessments > Stratue Stratue Stratue > Stratue Stratue Stratue Stratue Stratue		Let be form to called the client's housing seesensmet disposition at end.	1
Ø				O inte

Runaway Homeless Youth (RHY) Exit

RHY Exit Assessment

Iment Exit (2024)							
wit the client from the Enrollment, enter the Exit Date and Destination.							
Exit Date:*	11/01/2024						
Destination:*	Staying or living with fan	mily, permanent tenure			~		
Exit Reason:	SELECT	~					
Date of Status Determination:*	10/01/2024			1000			
Youth Eligible for RHY Services :*	Yes v			The a	nswers will auto		
Runaway Youth:*	Yes	~		popu	late from the entr	У	
Case Manager Assignment:	Stephanie Hand				sment if provided		
End Case Assignment:	0				•		
	Family Income:						
	Income Family Incon \$0.00 \$1,500.00	Family Members	Poverty Level \$1.703.33	% of Poverty 88.06 %			
	Income Family Incom \$0.00 \$1,500.00						
Service Date:*	Income Family Incom \$0.00 \$1,500.00 11/01/2024 Image: Compare the second	2	\$1.703.33				
Service Date: * Grant:	Income Family Incom \$0.00 \$1,500.00 11/01/2024 Image: Compare the second	2	\$1.703.33				
Service Date: * Grant:	Income Family Incom \$0.00 \$1,500.00 11/01/2024 Image: Compare the second	2 on RHY BCP v	\$1,703.33	88.06 %	Units*	Unit Value*	Total
Service Date:* Grant: Enrollment:*	Income Family Incom \$0.00 \$1,500.00 11/01/2024 Image: Compare the second	2 on RHY BCP V Displaying 1-200 of 3	\$1,703.33 * 67 results. Next	88.06 %	Units*	Unit Value*	Total 50.00
Service Date * Grant: Enrollment *	Income Family Incom \$0.00 \$1,500.00 11/01/2024 Image: Compare the second	2 Displaying 1-200 of 3 Unit Typ	\$1.703.33	88.06 %			
Service Date: Grant: Enroilment * Service* 11 # of Family Members in Courseling	Income Family Incom \$0.00 \$1,500.00 11/01/2024 Image: Compare the second	2 on RHY BCP V Displaying 1-200 of 3 Unit Ty Coun	\$1,703.33	88.06 %	1.00	\$0.00	\$0.00



Save Save

RHY Counseling Assessment

HUD Program Exit *	Collean Banks 2/28/2008 Woman (Birt, If child) 53383 4 🗎 1						
(2297/1B582)	Counseling Assessment	θ					
Exit Enrollment Exit Assessments Barriers / Special Needs	Counseling Assessment - to be collected at exit for all adults and heads of household. Default Last Assessment						
 Income Employment Child Education 	Assessment Active Pre-Exit						
Health RHY Exit Assessment Counseling	Assessment Date:* 11/01/2024 Client received counseling* Versessessessessessessessessessessessesse						
Safe and Appropriate Exit	Type(s) of Counseling Receiveds. Virial Same Family Oroup - including peer counseling						
III Pause X Cancel	Total number of sessions planned in Client's treatment or service plan: 5 Post-Exit						
	A plan is in place to start or continue counseling after exit." Yes v						
	8	we					

RHY Safe and Appropriate Exit

HOD Program	Colleen Banks 2/28/2008 Woman (Girl, if child) ClientID 53383 A market ClientID			
Exit *	Safe and Appropriate Exit			< 0
⊘ Exit Enrollment				
✓ ★ Exit Assessments	Complete the information below related to the selected client's safe and appropriate exit assessment and other	relevant inform	mation.	
 Barriers / Special Needs 			Defai	Client's Last Assessment
⊘ Income				Assessment Active
S Employment	Assessment Date:*	11/01/2024	ė	
Child Education	Exit destination safe - as determined by client:*			
⊘ Health				
⊘ RHY Exit	Exit destination safe - as determined by the project/caseworker:*		*	
Assessment	Client has permanent positive adult connections outside of project:*	Yes	*	
 Counseling Assessment 	Client has permanent positive peer connections outside of project:*	Yes	~	
Safe and	Client has permanent positive community connections outside of project:*	Yes	~	
Appropriate Exit				

RHY Aftercare

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

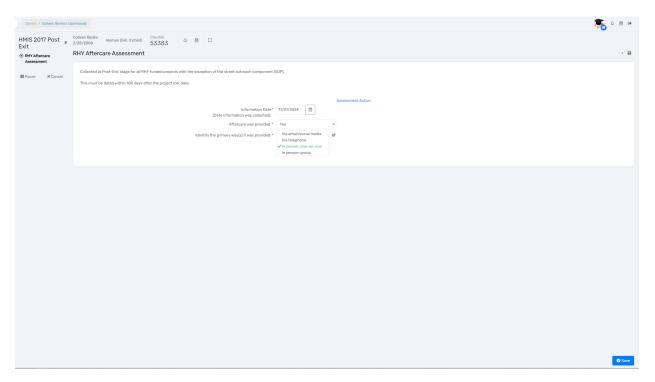
To enter an Aftercare Assessment, go the enrollment action button and select RHY Aftercare. To view any Aftercare Assessments, go to the Client Dashboard, select the RHY Assessments folder on the left-hand side of the screen, and then select RHY Aftercare.

X	Q Search	Citerts / Catent Blanks's Dehoced	۵ 🍋	₿ 0+
۲	Center For Human Services	Colleen Banks Woman (Bark, If chaid) Diamtin Diamtin Diamtin Diamtin 22/20/2008 Woman (Bark, If chaid) 53383 Image: College		
? 101 101	_Modesto Users 2020	Colleen Banks's Dashboard		*
	Q Find Client Client Dashboard Client Dashboard	Cotteen Bankis Information STANISLAUS TEST	ß	
\$	 Day Center Entry Profile Common Assessments Other Assessments Enrollment and 	Here Bares. Collect Murie Bit the Bare 2028/2008 Gender Workin [DSI: # rink] Bit the Bare 2028/2008 Gender Workin [DSI: # rink] Bit the Bare American Indian, Assista Nation, or Indigenous, Blass, African American, or African	Age: 16	
	Services C RHY Assessments RHY Entry Assessment	To view Aftercare Assessments	ß	
	C RHY System Utilization	Development Active Household Type Project Start Defe II Housing Mov-In Date Project Exit Date II Care D EvolUti Days Drotted Exit Destination Organization Last Assessed	Program Type	
	RHY BCP Assessment RHY Counseling Assessment RHY Exit Assessment		0	
	Safe and Appropriate 5-1	© Missel Annual Update Assessment Co Ø Edit Environment	ß	
	RHY Aftercare SPDAT Assessments Assessments Read-Only	C et traject forly violation C et at reject forly violation		
Ø	unade (unity)	E Rolf Affareas	P	

Create Aftercare Assessment

HMIS 2017 Post Colleer Banks Vorman (Girl, If child) ClientID 53383 A Exit 00 Create Affrecare Same			
III Pause X Cancel			
	Create Aftercare Assessment Would you like to start a RHY Aftercare Assessment. Selecting Yes	Yes	
	will create a Post-Exit Assessment for Colleen.	× No	

RHY Aftercare Assessment



Projects for Assistance in Transition from Homelessness (PATH) Exit

SOAR Connection

	Vanessa Maciel					
Exit *	Vanessa Maciel Woman (Girt, if child) ClientID 53380 A 🗎 (3)					< 8
⊘ Exit Enrollment					Defeult status if these	
 Exit Assessments Connection with SOAR 	Indicate the Connection with SOAR for the client below	De	fault Client's Last Assessment	•	Default status if there are no changes	
O Barriers / Special Needs			Assessment Active		are no changes	
O Income		Assessment Date: 11/04/2024	*			
Current Living Situation		Connection with SOAR: • SELECT	Ŷ			
Pause X Cancel						
						Save

Current Living Situation

	UD Program kit ¥	Vanessa Maciel Woman (Girl, if child) ClientID & @ ClientID 8/1/1980	
	297/1B582)	Current Living Situation	< 0
~*	Exit Enrollment Exit Assessments Connection with SOAR Barriers / Special Needs		
	⊘ Income	Current Living Situation Information	
	Current Living Situation	Current Living Situation.* Is client going to have to leave their current living situation within 14 days.* Location Detail:	
		Record Contact:	
			Save

Exit Only One Household Member from Enrollment

For this example, we will use the household of Analisa Perez (head of household) and Adrian Hernandez (son). Start on the Client Dashboard of the client you wish to exit from the project. <u>Exit the Enrollment</u> as normal. Once you complete the workflow, the system will ask you if you wish to exit the additional household member from the enrollment.

HUD Program Exit (2297/1B582)	Adrian Hernandez 5/22/2022	Man (Boy, if child)	ClientID 53413		
Exit Enrollment O Exit Assessments					
 Perez, Analisa Linda 					
O Do you want to exit?					
0 00,000,000,000					
Pause X Cancel					Select Yes to exit the household member enrolled
					member enrolled
				Do you want to exit?	Ves
				Do you want to exit Perez, Analisa Linda?	No
					Select No to keep the household member enrolled

))) (Home Search	Clients / Adrian Hernandez's Dashboard		5	4 B 0+												
۲	Family Promise	Adrian Hernandez Man (Boy, if child) 53413 Q E :	Adrian Hermandez 5/22/2022 Man (Boy, if child) G3413 Q B 1														
?	_Modesto Users 2020	Adrian Hernandez's Dashboard			*												
8	Q Find Client	Adrian Hernandez's Information		2	s												
** ☆	Day Center Entry	STANISLAUS TEST															
	Profile Common Assessments Other Assessments Denroliment and Services	the second secon	Gender Man (Boy, Fichal) CEast D 5313 Rece Black, MrCan American, or Mican, Hispanic/Latina/e/o, White														
	RHY Assessments	s Adrian's Enrollments the project		2	s												
	 > SPDAT Assessments > M Coordinated Access (Read-Only) 		Ervatilo II Days Donaled Exit Destitution Organization Last Assessed	Program Ty 0	pe												
		Adrian's Services		2	s												
		No month fund. Date 12 Service 5 Total Operation	Service Creation Time														
Totop://clann	track eccivia com∕Main®ace aco⊓Tr	The son has been exited from the project															

Submit Support Issues Internally Through ClientTrack

Report Issues

If you are experiencing difficulties logging into HMIS, please email <u>HMIS@stancounty.com</u>.

If you are experiencing difficulties while in HMIS, please submit an issue ticket in ClientTrac	If you are exp	periencing diffic	ulties while in HMI	S, please submit an	issue ticket in ClientTracl
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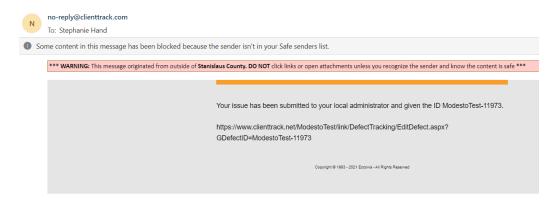
County Community	Jasper King 8/15/1961 Man (Boy, if child) ClientID ↓ iii III				
rvices Agency fodesto Users 2020	Jasper King's Dashboard				
	Jasper King's Information				
Find Client					
L Intake	STANISLAUS TEST				
Day Center Entry		King, Jasper James III	Birth Date: 8/15/1961		,
Profile			were were were and the state of		
Common	Gender:	Man (Boy, if child)			
Assessments	Client ID:	53033	Race: Asian or Asian American, Black, African American, or Af	rican	
Other Assessments					
Services	Jasper's Enrollments				
RHY Assessments SPDAT			1 result found,		
Assessments	Enrollment Active Household				
Coordinated Access (Read-Only)	Description Members Household Type	Project Start Date	Project Exit Date 1. Case ID EnrollD 1. Days Enrolled Exit Destination	Organization	Last Assessed
	 Active Emergency Shelter - Entry Exit 				
		08/14/2024	94515 137637 2	(CSA) Stanislaus County Community Services Agency	8/14/2024
	CSA TEST ES 1 Household without Children				
	CSA TEST ES 1 Household without Children				
Ensu		page you are			
	e you generate the issue on the	page you are			
		page you are	No records found.		

Select Report an Issue and complete the form with your issue information. You can also attach a file or screenshot to the issue ticket to help provide context. Enter Subject/Summary and add the specifics of your reason for contacting the HMIS Support in the body of the issue statement. Please be very specific when you submit an issue to limit the number of times HMIS support needs to reach out for clarification. If you have access to more than one Organization or Workgroup, please include which you are working in (you can hover over your name to see which you are in). **Note:** if Duplicate clients, make sure you are specific which client has the correct information to be merged.

		mary	of yo	ur iss	ue *						
he su	mmary	helps	to qui	ckly id	entify your is	sue whe	en you	ı're re	ferring	g back t	o it later.
Pleas	e desc	ribe t	he iss	sue							
1	B	I	U		Rubik -	A	•	:=	1	Ξ·	⊞ •
œ		×	?								
lease	entera	iny de	tails th	at miç	ght help desc	==== cribe the	issue	or mi	ght hi	elp in so	olving it.
lick I	here to can v	we r	ch a f	ile or	ght help desc drag-and-	ribe the					olving it. I g Informatio
lick I	here to	we r	ch a f	ile or	ght help desc drag-and-	ribe the					
Click How	here to can v	we ro	ch a f	ile or	ght help desc drag-and-	ribe the					

DO NOT send client full names, dates of birth or social security numbers via email or to the HMIS Support. Identify clients using their unique ClientID.

You will receive an email with a ticket number once it has been submitted to the System Administrator, describing your issue.



View and Respond to Issues

You will receive an email if the HMIS team has left a note on your issue ticket. This is how we will ask for any clarification or ask you to verify the change has been made. To go back to view your issue, go to My Submitted Issues. You can view/edit each submitted issue you have submitted.

	-						4 🌄
(CSA) Stanislaus County Community Services Agency	My Submitted Is	us County Community Services Agency	_Modesto Users 2020				× 0 B 0
_Modesto Users 2020	, cabinition io						
	Issues include proble	ems, questions, or suggestions submitted	I by a user about ClientTrack. These issues can b	e created by clicking help anywhere thro	ghout ClientTrack. Any issues you have	submitted through the "Help & Support" system are dis	played below. Use the Status list to filter results.
User Dashboard			Issue Status:	✓ Assigned 🞸 Closed			
Data Explorer				Fixed, Verify Needed			
Current Enrollments w/ Most Recent				View			
Assessment				2 re	ults found.		
S My ClientTrack		Issue #	Submitted Date	Тур	Summary	Status	Assigned To
Case Load	8	ModestoTest-11973	08/16/2024	Issu	Remove Enrollment	New	Not Assigned
Entry By Name	e V	ModestoTest-11971	07/24/2024	Issu	a Slow to load	New	Not Assigned
List (BNL)		Prodestorest-11771	07/24/2024	1996	5 510W 10 1080	NOW A	Not Assigned
HHIP Reporting					k	T	†
Bed and Unit Inventory	_	•			\ \		
Quick Services -		Edit/View your i	ssue here		`		
Multiple Clients		Early them your i	souch ere			N 1	
My Information							
🤱 My Team						See the summary, st	atus and who the
 Change My Password 							
③ Paused						issue is assigned to	
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E My Submitted		View everyies					
Day Center Administration		view every issu	e you have submitte	a			
Group							
🗘 Global							
Administration							

Once you open your submitted issue, you can view or add another note or mark that the issue has been fixed. You can only mark the issue as fixed if you have verified on your end. Please make sure you are reviewing your submitted issues regularly.

X	Q Search	Insues	ب م	•
-	(CSA) Stanislaus County Community	← Issue ModestoTest-11973 TEST Remove Enrollment	Internal	р н
?	_Modesto Users 2020	V Details V Isturted an enrollment on the wrong client. Can you please remove the CSA TEST ES enrollment for client 50033 case ID 94515.	Assigned * Submitted by Stephanie Hand)u 3 •
8	Advanced Issue Management Manage Issues	Attachments + No Attachments	Friday, August 16, 2024 Assigned To	
☆	Q Issue Search		Stephanie Hand	Ŧ
	 Internal Issues My Assigned Issues My Submitted Issues 	Notes + Any notes that have submitted by the HMIS team or you will be listed here	Interested Add an interested person	
	 Tasks Related to the Selected Issue My Time Entry for Selected Issue 	Xi* B I V B Redx* X * III III III III III III III III IIII IIII IIII IIII IIII IIII IIII IIII IIIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII		
		Save the nucle Save and update status - Cancel		
0		If you add a note, you can save the note or save and update the status of the note		

ClientTrack Reports

Access any reports from the Reports Dashboard. Below are just some of the reports listed in the available tabs. This is not an exhaustive list.

x	Q. Search	Reports		🥦 A 🛚 🖷
43 ?	(CSA) Stanislaus County Community Services Agency _Modeum Users 2020	Reports Dashboard		*
		(CSA) Stanislaus County Community Services Agency News		
• •	 Data Explorer Files on Server My Saved Reports 	Community Services Agency (CSA) Stanislaus County		
۳.		Welcome to ClientTrack		
	HMIS Exports HMIS Reports Administrative	The HMIS System for Stanislaus Community System of Care Collaborative		
	Reports HMIS Lead Reports Cient Reports	All available reports here		
		Halp Informations: Halp Information: Use de Proje Taples link or consect the HMIS Administrato.		
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D https://clier	ttrack.eccovia.com/MainPage.aspx?lr	line=top#menu000	05 10 15 20 25 30 35	

BNLs: Active Client List

HMIS Exports: APR/CAPER Review, CSV APR, CSV CAPER,

HMIS Reports: HUD Data Quality Report

Client Reports: Client List, Client Demographics

Enrollment Reports: Clients in Programs, Income at Entry/Exit

Referral Reports: Referrals to Providers, Referrals from Providers

Service Reports: Service Summary, Frequently Served Clients

HMIS Reports

Active Client List

The Active Client List report will show chronic homelessness status, income, and can be used to determine bed nights and utilization. Navigate to the BNLs to select Active Client List. Insert the requested date range, report type (active at any point, begin enrollment, exited, still enrolled), organization, and program. You have additional filters you may select which include head of households only, filter by user, and hide PII.

0		
S Active Client List		<
use saved report settings	To save the settings for a new report, select Save Settings, type the description of the settings in the Save As field, select the report settings, and run the report. The saved settings will appear in the list the next time you access this screen.	1
	Saved Report Settings:	
	control miguel servicing	
te Range	The Help Icon will	
icate the time period for this report. Only records that fall within		
	Predefined Date Range: SELECT Y	
	Ervolments between: 10/01/2023	
	report will	
eport Type dect diction of any point to show clients who were in the projection) at any time in the report range. Select Begin Envolument to show clients with a project start date in the time frame. Select Exited to show clients with a project exit date in the time frame. Select Star Er	300.0
ect Active at any point to show clients who were in the projecto		ime.
	Report Type: Active at any point v	
tive Client Method		
	t Glossary definitions for Active Client. Selecting Entry/Exit Dates will only consider clients project start and end dates.	
	Active Client Nethod: * Report Olassary Active Client 👻	
ganization(s)		
dicate which organizations should be included in the report by se	lecting each organization separately, or click the 🏕 icon to select all. Note: The list only shows organizations you are authorized to view.	
	Organization(s) (CA) HOST House (CGA) Stanislaus County Community Services Agency	
You will only see	123	
the organization	Applanet Burley Foundation (Providence Devices Linkson), Providence	
-		
eck the box to	key at displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the 🌶 icon to select all.	
have access to	Program Trope:	
	Program(s) · ②Fiter by Program(s)	
	why same	
	County HBPP *	
	DRAL SSO	
	B Report	port Car

Once the report has been completed, you will see the clients in that program during the requested time range. Selecting the plus sign next to each client will allow you to view more information about the enrollment. You may also save this document as Excel, Excel Data, PDF, or Word document or print.

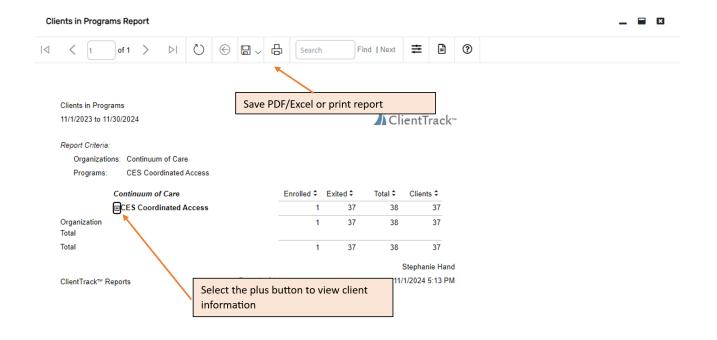
	нм	1IS Activ	ve Clie	ent Lis	t														
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The plus sign after each			IMIS Active Client – By Name List leport Range: 10/1/2023 to 10/31/2024										ClientTrack						
client will allow for further details		Report Report T	ype:			at any poi													
		Active C Organiza Program	ations:	er:		Glossary tanislaus ST ES			ty Service	s Agencj	у								
	\mathbf{X}	Client II	nt ID Client Name S				SSN	SSN I			Age Gender		Race / Ethnicity					Veteran Status	
	À	85303 3	3	King, Ja	sper Jame	5	XXX-X	X-3233		62	Man (B child)	oy, if	Multi-Racial	/ Non-ł	Hispanic/1	Non-Lat	ina/e/o	No	
				Program	n Name		Organ	ization		Rela	tionship		Entry Date	Exi	it Date	Day	s in Proj	ect CH Status	
				CSA TES	IT ES			unity Ser	s County vices	Self			08/14/2024			78		No	
		€5341	16 King, Kimberly			XXX-XX-2873			1	Woman (Girl, if child)		Black, African American, or African / Non- Hispanic/Non-Latina/e/o			No				
		B53376 Lopez King, Jesus Michael XXX-XX-5285 33 Man (Boy, if child)							oy, if	Multi-Racial /	No								
		ClientTra	ack™ Re	ports							Page	e 1 of 1						Stephanie H 10/28/2024 4:57	

Clients in Program

The Clients in Program report shows quick visuals of clients served. It does not show income or chronic homelessness status and currently adds a day to Days Enrolled. The report will show both the duplicated total and the unduplicated clients. Navigate to the Enrollments Reports to select Clients in Program. Insert the requested date range, report type (enroll at any point, begin enrollment, exited), organization, and program. You have additional filters you may select which include filter by user, filter by age, and include head of households hold. **Note:** Selecting a grant will cause issues in how the report is run. Do not select a grant.

D	
Clients in Programs Report	< 0
Gireits in Früglahs Report	
unce uninger Indicate the lame period for this moort. Only records that fall within the date range you select will be included.	
Predefined Date Range: SELECT V	
Errollments betweer:* 11/01/2023 🖨 and 11/30/2024 🛱	
Run Report By	
Select Enroll to run the report filtered by program enroll date fail in the report date range. Select Exited to filtered by the program exit date. Select Enroll at any time to show all the clients still in the program during the report date range.	
Provide and Provid	
Report Type:* Enroll at any point v	
Organization(s)	
Indicate which organizations should be included in the report by selecting each organization separately, or click the 🎸 icon to select all. Note: The list only shows organizations you are authorized to view.	
Organization(s).* (CA) HOST House	
(CSA) Stanisławs County Community Services Agency 125	
x Assiranet	
BUDP (Plandolum Periods) Databasian (Martha 9 Basimon, Pancinan)	
Program(s)	
Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the & icon to select all.	
Program(s) 🦉 Fiter by Program(s)	
_NeN 25	
CES Condinated Access	
CHS Hutton RHY BCP	
TSA Day Center	
Grant(s)	
Check the bark to limit report results by selected grants. When checked, the list displays grants that belong to the organizations you selected above. Indicate which grants should be included DO NOT select a Grant. This will affect	
Grant(s): Filter by Grant(s) your report numbers	
	The
Users	
Check the bax to limit report results by selected users. When checked, the list displays users that belong to the organizations you selected above. Indicate which users should be included in the report by selecting each user separately, or click the 🎸 icon to select all.	
User Filter by User	
B Report	Schedule Report Cancel

Once the report has been completed, you will see the clients in that program during the requested time range. Selecting the plus sign next to each client will allow you to view more information about the enrollment. You may also save this document as Excel, Excel Data, PDF, or Word document or print.



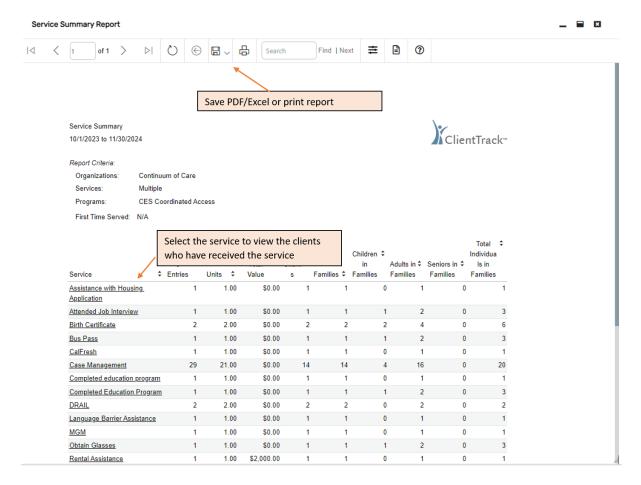
Service Summary Report

The Service Summary Report will provide a list of recorded services under your organization. You can filer by a specific program and/or service. **Note:** Selecting a grant will cause issues in how the report is run. Do not select a grant.

Navigate to the Service Reports to select Service Summary. Insert the requested date range, organization, and program. You have additional filters you may select which include filter by service, filter by user, etc.

ervice Summary Report	< 0
Date Range	
Uncluste the time period for this report. Drily records that fail within the date range you select will be included.	
Predefined Date Range:	
Organization(s)	
Indicate which organizations should be included in the report by selecting each organization separately, or click the 🞸 icon to select all. Note: The list only shows organizations you are authorized to view.	
Organization(s).* (CA) HOST House (CSA) Stanislatus County Community Services Agency 123 Applanet Program(s)	
Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above, indicate which programs should be included in the report by selecting each program separately, or click the 🏈 icon to select all.	
Program(s): Program(s) NDM VES:Doordinated Access CH3Hutton RYY BCP TSA Day Center	
Granto	
Check the box to limit report results by selected grants. When checked, the list displays grants that belong to the organizations you selected above. Indicate which grants should be included DO NOT select a Grant. This will affect	
Crant(s): Fitter by Crant(s) your report numbers	
Services	
sarrivals: Select the specific services for the report, or leave the field blank to run the report for all services in this list are filtered according to the organizations and funding sources selected above.	
Services: Services: Abstiment (1018) ACES (1055) Adult Protective Services (1128) Ageis (1050) Ageis (1050) Ageis (1050) Apple 2 tota (1050)	5
B Report B Schedule Report	Cancel

Once the report has been completed, you will see the services provided during the requested time range. Selecting service will allow you to view each client who has recorded this service. Note: These can be duplicated numbers. You may also save this document as Excel, Excel Data, PDF, or Word document or print.



HMIS Exports

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

HMIS Standard Reporting Terminology Glossary

HMIS CSV Format-Specifications

HMIS Data Standards

Files on Server

The Files on Server tab will list all the files available for you to download. These are reports you have run in the past. Navigate to the Reports Dashboard and select Files on Server. **Note:** files do expire and will be deleted on the expiration date specified. If you do not need the reports again, please remove from Files on Server to keep the system running more efficiently.

Please remember you must delete the file from your downloads folder and clear your recycle bin. Unless you save the document on a secure drive, files should never be kept on your computer. You can download the file again from Files on Server if you need them. Note: record the Task ID to identify which report is which.

X	Q Search	Reports 🖉 A 🛎 🖝
۵ ۲	Continuum of Care _Modesto Users 2020	Files on Server View any queued reports
80 80 40	 Data Explorer Files on Server My Saved Explores 	Displayed below is a list of the first available for your disented. First with an exploration date will be automatically removed on the date specified. Dick a file to download it. To remove the file, click the delete link. Droc deleted, the file will no longer be available for download by any user and will not be available for processing if used in an import.
☆ 5	BNLs HHIS Exports HHIS Reports Administrative Reports	Thu don't have any files on the file serves.
	Files on Se	Any reports you have completed will be listed here

Any files that do not appear in this section may still be queued. To view the status of your reports, select the View the status of export or import tasks.

Asynchronous Tasks

If you select View the status of export or import tasks, you will see a pop-up for asynchronus tasks. The Asynchrous Tasks pop-up is a listing of tasks that are either queued to be completed or that have been completed in the last 40 Days. This will show all the tasks. To view only your own, select the box next to Show only my tasks.

X	Q Search	Reports							🥵 4 B 🕫
٠	Continuum of Care	- 0							
?	_Modesto Users 2020	Files on Server							
III (1) (1) (1) (1) (1) (1) (1) (1) (1) (1)	Data Explorer Files on Server My Saved Reports My Saved Reports DINLS HMIS Experts	Displayed believing a list of the first available for you to download. Files with a proposed and a second se	n expiration date will be automatically removed on the dat	e specified. Click a file	to download it. To re	move the file, click t	the delete link. Once d	wheted, the file will no longer be available for download by any user an	d will not be available for processing if used in an
8	> C HMIS Reports		Asynchronous Tasks				_ 8 0		
	> 🗅 Administrative Reports		Asynchronous Tasks				< 0		
		To view only your requests	Industa is a long of Last Annual Constraints (Softer Dis Research of Last Annual Constraints (Softer Dis Research of Last Annual Constraints) Prove Softer of Constraints Restructing in 21 seconds Task Name 	e left of the task. To v I's important to note t	ew a log of the task hat it a task begins i	execution, upon tasi	k	Select the help icon for context on specific statuses	
Ø									

The Status will provide an update on to requested task or report you ran.

Suspended: Task waiting on user to complete some setup portions need for the task to complete successfully

Pending: All required steps have been completed task ready and waiting to be processed at the next available processing time.

Processing: Background service is currently actively processing the task

Completed Successfully: Task completed as expected without errors

Error: There was an error running the task review the log to determine what may have caused the task to be unsuccessful in execution.

CSV CAPER

Navigate to the Reports Dashboard and select the HMIS Exports folder. Select CSV-CAPER FY2024. Select your date range and choose the grant program, grant component, grant(s), and project(s). Generate Validation File will be auto selected. Unselect this only if you do not wish to generate a validation file with your export.

X	Q Search	Reports / CSV CAPER - FY2024 v1.2	🎘 4 е м
-	Salvation Army ESG	- 0	
?	_Modesto Users 2020	CSV CAPER - FY2024 v1.2	< 0
	 Data Explorer Files on Server My Saved Reports 		004/2023
*	My Saved Reports	Organization	o select all. Note: The list only shows organizations you are authorized to view. Only enrollments created by the Organizations selected here will be included in the export.
☆	> 🗅 BNLs		
	→ C HMIS Exports	or gammanon.	(CSA) Stanislaus County Community Services Agency
	APR / CAPER Review		123 Aggirantet Del Polaniatura Pauratu, Bakurziant Maritka R. Planamura, Comiziant
	E+ CSV APR - FY2024	Grant Program	
	CSV CAPER - FY2024	Use the Grant Program and Grant Component drop down selections to narrow down the list of Grants.	
	CSV CE APR - FY2024	Grant Program:	- SELECT •
	CSV Export 2024	Grant Component:	- SELECT ¥
	LSA Export	Grant(s)	
	Preview LSA Runs		report by selecting each grant separately, or click the 🞸 icon to select all. Use the Grants filter to narrow down the list of projects for your export.
	> 🗀 HMIS Reports		Fite by Grant(s)
	> Administrative Reports		MOD/CITY ESG ADD/CITY ESG CV ES
	> 🗅 HMIS Lead Reports	· · · · · · · · · · · · · · · · · · ·	MOD/CITY ESG ES FY23-24
	> 🗅 Client Reports		STAN/COUNTY ESG ES
	> 🗅 Enrollment Reports	Project	
	> 🗅 Referral Reports	The list displays projects that belong to the organizations you selected above. Indicate which projects should be included in Unchecking the HMIS Projects Only checkbox will allow the APR to be run on any project in the system. If running an APR for	
	> 🗅 Reports		
	> 🗅 Service Reports	Project Type:) Filter by Project Type
		HMIS Projects Only:	
		Project(s):*	Fitter by Project(s)
		Ť	TEX.Energency Shelter 🦻
Ø			Run Export Cancel

Once you select Run Export, you will receive a pop-up in regards to exporting the encryption. If you choose to encrypt the export, you will need to create a password for the downloaded documents. If you record a password, as you will be asked to enter it to complete the download. **Note:** Some firewall and security measures may block any exports that have passwords. You may also de-select the Encrypt Export box, however, you must then select that you assume full responsibility of ensuring the security of the exported file(s) and any data continained within the document.

Export Encryption	
If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES	Export Encryption
encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long. If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information. Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should <i>always</i> be enclose in double-quotes. Encrypt Export:	information in plain text. All appropriate cautions should be exercised to ensure the protection of
Always Quote CSV Values(s): C ClientTrack is not responsible for the protection, use, or misuse of information contained in the exported file(s). I assume the full responsibility of ensuring the security of the exported file(s) and any data contained within	Encrypt Export: Password:* Confirm Password:*
Done	Done

Your report may take 20 minutes or longer to generate. The system may slow if multiple users are running big reports at the same time. It may be beneficial to run the report overnight to avoid the slowness. Once your report is ready, download the file by selecting on the name. If you added a password, you would receive a pop-up asking you to enter the password and assume responsibility to download the file.

X	Q, Search	Reports	م 🖡	8
٠	Senior Advocacy Network	- a		
?	"Modesto Users 2020	Files on Server		
10 10 11	 Data Explorer Files on Server My Saved Reports 	import. Vew the status of export or import tasks.	le to download it. To remove the file, click the delete link. Once deleted, the file will no longer be available for download by any user and will not be available for processing if used in an	n
☆		Select on the	report you Created Expires	
	BNLs HMIS Exports	HMIS APR_CAPER 2024 Validation_20241104175741_TaskID_143470.exe would like to	download Stephanie Hand 11/4/2024 5:57 PM 11/4/2025 5:57 PM	Ť.
	- 🗀 HMIS Reports	HNIS APR 2024 Export_20241104175700_TaskiD_143469.exe	Stephanie Hand 11/4/2024 5:57 PM 11/4/2025 5:57 PM	
	HMIS Data Entry Timing Report	HHIS APR_CAPER 2024 Pro-Load 2_20241104174614_TaskID_143468.exe	Stephanie Hand 11/4/2024 5:46 PM 11/4/2025 5:46 PM	
	 HUD Data Quality Report 	HMIS APR_CAPER 2024 Pre-Load_20241104173601_TaskID_143467.exe	Stephanie Hand 11/4/2024 5:36 PM 11/4/2025 5:36 PM	
	HOPWA APR HOPWA APR/CAPER	HUD Data Quality 2024_20241104164652_TaskID_143466.exe]	Stephanie Hand 10/4/2024 4-46 PM 10/4/2025 4-46 PM	•
	FY23 PIT Point in Time (2024)			
	Project Descriptors Data Element(PDDE) Report			
	HUD Bed Night Report			
	LSA Descriptor Quick Glance			
	PATH Annual Report (2024)			
	Performance Measures (FY24)			
	Administrative Reports			
	> 🗅 HMIS Lead Reports			
	> 🗅 Client Reports			
Ø	> 🗅 Enrollment Reports			

ClientTrack		
Enter the password to extract the file(s)		
•••••		
continued protection of this information. Data Systems inte the information contained within the file(s). By checking th responsibility of ensuring the security of the file(s) and any this data once it is no longer needed. Users of this extraction	text. All appropriate cautions should be exercised to ensure the mational (DS) is not responsible for the protection, use, or misuse of following box, you acknowledge that you will assume the full data contained within, including the responsibility of properly deleting to to should consult their employer's policies, procedures, and cition of personally identifying information for a dditional guidance.	
I arruma recognibility for the convity of the or		
I assume responsibility for the security of the ex Enter or select the directory to extract to		
Enter or select the directory to extract to	tracted file(s)	
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Enter or select the directory to extract to C:\Users\handst\Downloads V view files after extracting	tracted file(s)	
Enter or select the directory to extract to C:\Users\handst\Downloads V view files after extracting	tracted file(s)	

Review further in this guide for more information about the Validation Report.

CSV APR

The APR export is designed to meet HUD reporting requirements with the SAGE Repository. It is an export consisting of 72 separate CSV files.

Navigate to the Reports Dashboard and select the HMIS Exports folder. Select CSV APR FY2024. Complete all the information. **Note:** Generate Validation File will be auto selected. If you would like a validation file with the APR, keep this box marked.

X	Q, Search	Reports / COVARE-Pr2COV-V12	🥦 A 🗎 🖷
-	Senior Advocacy Network	- 0	
?	_Modesto Users 2020	CSV APR - FY2024 v1.2	< 🕀
	🕤 Data Explorer	This tool has been programmed based on the specifications for the version listed on the title as sufficed by HUD. Current and historical specifications can be found on the HUD Exchange CoCAPR and ESG CAPER Programming Specifications page linked here.	
	E Files on Server	All clicits sended in the projectigrants selected in the Rese below will be included in the report. Selecting multiple project and/or grants is only intended for cases where multiple projectigrants are required for the APR submission. Selecting more than on projectigrant will after performance and should only be used when recensary for compliance.	
	My Saved Reports	Saved Report Settings	
\$	> 🗀 BNLs	to use previous seed report settings, select the desired settings description. To save the current report settings, select the previous field settings in the Save As field, select the report criteria, and run the report. The saved settings will appear in the list the next time you access this screen.	
	✓ ➡ HMIS Exports ▲ APR / CAPER	CSV APR	
	Review	Report Martine 0	
	FY2024 E+ CSV CAPER - FY2024	Date Range Indicate the time period for his report. Only records that fall within the date range you select will be included.	
	E CSV CE APR - FY2024	Date Range Lat: Since The Date. Last Year	
	CSV Export 2024	Begin Date: 11/04/2023 🖹 to 11/04/2024 🗟	
	LSA Export	Organization	
	Preview LSA Runs	Indicate which organizations should be included in the report by selecting each organization separately, or cick the 🇳 icon to select all. Note: The last only shows organizations you are authorized to view. Only enrolments created by the Organizations selected here will be included in the export.	
	HMIS Reports	Organization.* (CA) HOOT House (CA) HOOT House &	
	Administrative Reports	Applanet Applanet (Transless Construction Liness Construction)	
	> 🗅 HMIS Lead Reports		
	> 🗅 Client Reports	Grant Program	
	> 🗅 Enrollment Reports	Use the Grant Program and Grant Component drop down selections to narrow down the list of Grants	
	> 🗅 Referral Reports	Grant Program: SELECT V	
	> 🗅 Reports	Grant Component: SELECT>	
	> 🗅 Service Reports		
		Orant(s)	
		This list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting each grant separatory click the 🌶 icon to select all. Use the Grants filter to narrow down the list of projects for your report.	
		unantitati and in received and and and and and and and and and an	
https://clie	nttrack.eccovia.com/MainPage.aspx?1	interstop&Secondary.Kay #RP/integ/Kay=#mo1066	- Run Export Cancel

Once you select Run Export, you will receive a pop-up in regards to exporting the encryption. If you choose to encrypt the export, you will need to create a password for the downloaded documents. If you record a password, as you will be asked to enter it to complete the download. Note: Some firewall and security measures may block any exports that have passwords. You may also de-select the Encrypt Export box, however, you must then select that you assume full responsibility of ensuring the security of the exported file(s) and any data continained within the document.

Export Encryption	Exact Econotico
If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long. If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information. Indicate if the exported file(s) should include a header line at the beginning of the file that indicates	Export Encryption If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long. If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of
what each of the values in the CSV file represent and if values in the CSV should <i>always</i> be enclosed in double-quotes. Encrypt Export: Include Header Row in CSV File(s):	this information. Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should <i>always</i> be enclosed in double-quotes.
Always Quote CSV Values(s): ClientTrack is not responsible for the protection, use, or misuse of information contained in the exported file(s). assume the full responsibility of ensuring the security of the exported file(s) and any data contained within	Encrypt Export: Password: * Confirm Password: *
Done	Done

After completing the step above, you will be directed to wait for your export to finalize. You can monitor the progress of the export on <u>Asynchronous Tasks</u>. The encrypted set of files will display on your <u>Files and Server</u> page when it has completed. Please remember to refresh the Files on Server and Asynchronous tasks pages periodically if you are waiting on the export to finish. The APR will generate two files. If the Generate Validation File is checked, a third is created. The HMIS APR 2024 Export will be the document you will keep and upload into Sage HMIS. The HMIS APR/CAPER 2024 Validation will be used to verify your data for errors (this includes client level data).

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full tas proces	is a listing of tasks that are either queued sk detail, click the view details folder to the ssing, completion or error, click view log. It ased on overall system load.	e left of the task. To v	iew a log of the task	execution, upon task	
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Your report may take 20 minutes or longer to generate. Once your report is ready, download the file by selecting on the name. If you added a password, you will receive a pop-up asking you to enter the password and assume

responsibility to download the file.

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	PIT Point in Time (2024)		
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	HUD Bed Night Report		
	LSA Descriptor Quick Glance		
	PATH Annual Report (2024)		
	System Performance Measures (FY24)		
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APR Background

Critical Data

The APR will look at the most recent project stay and associated data. Previous enrollments in the project, even those in the report date range are excluded from the report universe. Active clients in the most recent project stay are determined by the HMIS Reporting Glossary method. For projects other than Street Outreach, this will

be based on the entry and exit dates of the clients. For Street Outreach projects, active clients must have a contact in the reporting range.

Household Types

Numbers are reported throughout the APR by household type. Age and correct household composition is critical to accurately calculating household type. Clients who are not part of the same enrollment case (CaseID) will not be considered part of the household in the APR. Clients with unknown birthdates will likely cause the household to be counted as an unknown type. For Youth households, every case member must have a calculable age to ensure all requirements are met. The report uses the following instructions from the HMIS Reporting Glossary to calculate household type:

Household type	adults	children	unknown
a. Without children	>0	0	0
b. With children and adults	>0	> 0	n/a
c. With only children	0	> 0	0
d. Unknown household type	0	0	> 0
d. Unknown household type	0	> 0	> 0
d. Unknown household type	>0	0	> 0

Veteran and Youth Household Identification: Based on logic used among HMIS compliance reports and the Reporting Gloassary, only adults can be positively identified as Veterans. Similarly, to identify a Youth household, all case members must meet specific age requirements. If any case members have an unknown date of birth, the household cannot be positively identified as a youth household of any kind.

Substance Abuse: Substance abuse can consist of only alcohol abuse, only drug abuse, or both. If both drug and alcohol abuse is present, this counts as 2 conditions.

Income: For a valid income assessment to be reported several criteria need to be met. The client must be an adult, the data collection stage must be correct, and the assessment dates must match Entry and Exit dates or fall within the valid date range for the client's annual assessment.

Annual Assessments: Annual assessments are required for clients enrolled in the project 365 days or more. To be considered a valid annual assessment, the data collection type must be Annual and dated with the 30 day window (plus or minus) of the client's anniversary date.

Data Validation

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

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

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

Review further in this guide for more information about the Validation Report.

APR/CAPER Review

Once you run your CSV APR or CSV CAPER, you are able to view the review. The APR/CAPER Review will compile your data into an overview sheet, similar to the <u>Birds Eye Overview</u> for the HUD DQ Report. You can use this document to select the data element you wish to investigate further and see what clients are associated with each data element. This is a great tool to correct data quality errors.

Navigate to the Reports Dashboard and select the HMIS Exports folder. Select APR/CAPER Review. Select the report you wish to view. Note: You must run your CSV APR or CSV CAPER first. You will not see your report listed if you have not run the report.

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View your report once it's ready. You will see your overview of the CSV file you just ran. Each section contains a hyperlink that will allow you to view, in detail, which clients fall into that specific category.

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					Coordinated Entry Access		No (0)							
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Administrative					CoC Number		CA-510							
Reports					Geocode		062292							
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					Total Numbe	r of Persons Served	122	122						
					Number of ad	luits (age 18 or over)	121	121						
					Number of ch	idren (under age 18)	1	1						
					Number of pers	ons with Unknown Age	0	0						
										al l				

Selecting the hyperlink will generate a detailed report about the category you selected. This will provide you the count, the specific clients, their ClientID, program, and entry and exit dates. If you wish to view a client, select their ClientID and you will be taken to the client's dashboard.

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Project(s) :	TSA Emerge	ncy Shelter								
Include Details :	Yes									
Category					-			Count		
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PATH Annual Report

This report is for PATH specific projects. The report dates you set identify the date range to find active clients. Active clients are those with a project stay in the date range and have a contact, Date of Engagement, Date PATH Status Determined, or PATH Funded service entered in the date range. PATH grantees typically have both a Services Only and Street Outreach type projects. Both should be selected to produce a combined report. Where an active client has more than one applicable project stay, only data for the most recent project stay will be used except for Question 12.

Navigate to the Reports Dashboard and select the HMIS Reports folder. Select PATH Annual Report (2024). Input the date, organization, grant, and program(s) you wish to report. **Note:** If the CoC filter is selected, the report will only include project stays in that selected CoC as identified in the Client Location field.

X	Q Search	Reports / 2024 PM3H Annual Report - PY24 V1.3	6 A 🖱 🖗
484 ?	BHRS (Stanislaus County Behavioral Health & Recovery Services)	- 0 2024 PATH Annual Report - FY24 V13	< 0
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-	Data Explorer	Service Date Between." 10/01/2023 📋 and 09/30/2024 🖨	
	E Files on Server		
\$	My Saved Reports	CoO Filter	
	> 🗁 BNLs	You may, optionary, identify a single CCL to filter the most results (HHIS implementations with only one CoC do not need to do so). Note: This filter only applies to the initial client universe. If specified, this CCD must make their the exclinement had of household CoC or (if that is blank) then this location must match one of the CoC locations identified for the associated program.	
	HMIS Exports		
	V 🗅 HMIS Reports	State / Territory Pitter for CoC:	
	HMIS Data Entry Timing Report	CoC (reptonal): SELECT	
	 HUD Data Quality Report 	Organization(s)	
	HOPWA APR	Indicate which organizations should be included in the report by selecting each organization separately, or click the 🏈 icon to select all. Note: The list only shows organizations you are authorized to view.	
	HOPWA APR/CAPER FY23	Organization(d) * (CA) HOST House (C3) Stanslaux County Community Services Agency (23)	
	PIT Point in Time (2024)	Appipertet #EDIME (Providence Providence Deleterational Manufactor Manufactor)	
	Project	PATH Grant(s)	
	Descriptors Data Element(PDDE) Report	Check the box to limit report results by selected grants. When checked, the list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting each grant separately, or click the 🌶 icon to select all. Additionally, on this report you can only filter by PATH grants	ints.
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0	Client Reports	Biblioont Biblionet Biblionet	port Cancel

Bird's Eye Overview

Utilize the Bird's Eye Overview as a quick view of the report numbers. On this report, you can select the hyperlinks for each table title to view additional client level details.

Q, Search	Reports / 2024 PATH Annual Report - FY24 V1.3		Vour Report is Ready ×
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Data Explorer		I	Select to view Report
E Files on Server			
Hes on Server	Date Range	HMIS PATH Annual Report - Version: FY24 VI.3	
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> CI BNLs	cleet to them chefit details	Organizations: BHRS (Stanislaus County Behavioral Health & Recovery Services)	
> 🗋 HMIS Exports		Programs: BHRS PATH Supportive Services	
- HMIS Reports		Grants: BHRS PATH	
HMIS Data Entry	CoC Filter		
Timing Report		Questions 8 – 16: Persons served	
HUD Data	You may, optionally, identify a single CoC to filter the report results (HMIS implem- Note: This filter only applies to the initial client universe.	Persons served during this reporting period: Count	
Quality Report	If specified, this CoC must match either the client's enrollment head of household	8. Number of persons contacted by PATH-funded staff this reporting period 1	
HOPWA APR		9. Number of new persons contacted this reporting period in a PATH Street Outreach project 0	
and the second se		10. Number of new persons contacted this reporting period in a RATH Services Only project 1	
HOPWA		11. Total number of new persons contacted this reporting period (#9 + #10 + total new clients contacted).	
APR/CAPER FY23		12a. Instances of contact this reporting period prior to date of enrollment 0	
		12b.Total instances of contact during the reporting period 0	
PIT Point in Time	Organization(s)	13a. Number of new persons contacted this reporting period who could not be enrolled because of	
(2024)	Indicate which organizations should be included in the report by selecting each o	ineligibility for PATH 0	
Project		13b. Number of new persons contacted this reporting period who could not be enrolled because provider was unable to locate the client 0	
Descriptors Data		14. Number of new persons contacted this reporting period who became enrolled in PATH 0	
Element(PDDE) Report		15. Number with active, enrolled PATH status at any point during the date range 0	
		16. Number of active, enrolled PATH clients receiving community mental health services through any	
HUD Bed Night Report		funding source at any point during the reporting period 0	
1 LSA Descriptor		Question 17: Services Provided	
Quick Glance	PATH Grant(s)	Type of Service Number of people receiving service	
PATH Annual	Check the box to limit report results by selected grants. When checked, the list di	17a. Re-engagement 0	st separately, or click the 🗳 loon to select all. Additionally, on this report you can only filter by PATH grants.
Report (2024)		17b. Screening 0	
Me System		17c. Clinical assessment 0	
Performance		17d. Habilitation/rehabilitation 0	
Measures		17e. Community Mental Health 0	
(FY24)		17f. Substance use treatment 0	
> C Administrative	PATH Program(s)	17g. Case management 0	
Reports	Check the box to limit report results by selected programs. When checked, the list	17h. Residential supportive services 0	each program separately, or click the 🕏 icon to select all.
	and a second program when the second program when the second, the second	17L Housing minor renovation 0	and the second se
> C HMIS Lead		17) Housing moving assistance 0	
Reports		17k. Housing eligibility determination 0	
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· Dr. Courtmant		ruin meieren de enrigeu bienegeu.	

Detailed Export

Once you select Run Export, you will receive a pop-up in regards to exporting the encryption. If you choose to encrypt the export, you will need to create a password for the downloaded documents. If you record a password, as you will be asked to enter it to complete the download. Note: Some firewall and security measures may block any exports that have passwords. You may also de-select the Encrypt Export box, however, you must then select that you assume full responsibility of ensuring the security of the exported file(s) and any data continained within the document.

Export Encryption	_
If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long. If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information. Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should <i>always</i> be enclosed in double-quotes.	Export Encryption If If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long. If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information.
Encrypt Export: Include Header Row in CSV File(s):	Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should <i>always</i> be enclosed in double-quotes.
Always Quote CSV Values(s): C ClientTrack is not responsible for the protection, use, or misuse of information contained in the exported file(s). I assume the full responsibility of ensuring the security of the exported file(s) and any data contained within	Encrypt Export: Password:* Confirm Password:*
Done	Done

Your report may take 20 minutes or longer to generate. Once your report is ready, download the file by selecting on the name. If you added a password, you will receive a pop-up asking you to enter the password and assume

responsibility to download the file.

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٠	Senior Advocacy Network	- 0	
?	_Modesto Users 2020	Files on Server	
	Data Explorer	Dispersion in Find completed exports attriving the second	ed in an
B	E Files on Server	- apt	
۰.	My Saved Reports	View the status of expert or import fasts.	
☆		Select on the report you Created Express	
	BNLs HMIS Exports	HHIS APR_CAPER 2024 Validation_2024/104/0155/1_TaxID_VALSTO eve would like to download	
	→ 🗀 HMIS Reports	Hets APR 2024 Export_30241154195700_TaskID_H3449.exe	
	HMIS Data Entry Timing Report	Hells APP., CAPER 2024 Pre-Load 2_2024110417454M, TaskID_, M3468.eve 11/4/2024 5:46 PM 11/4/2025 5:46 PM	
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	HOPWA APR HOPWA APR/CAPER	HUD Data Quality 2024 _20241104164652_TaxIkD _143466 exet	٠
	FY23		
	PIT Point in Time (2024)		
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	Descriptors Data Element(PDDE) Report		
	HUD Bed Night Report		
	LSA Descriptor Quick Glance		
	PATH Annual Report (2024)		
	System Performance		
	Measures (FY24)		
	> 🗅 Administrative Reports		
	HMIS Lead Reports		
	> 🗀 Client Reports		
Ø	> 🗅 Enrollment Reports		

continued protection of thi the information contained responsibility of ensuring th this data once it is no longe applicable local, state, and	s information. Data Systems Internati within the file(s). By checking the foll is escurity of the file(s) and any data ir needed. Users of this extraction too federal laws governing the protection ity for the security of the extract	All appropriate cautions should be exercised and (DSI) in or the protection, owing box, you acknowledge that you will asso contained within, including the responsibility i should consult their employer's policies, proc of personally identifying information for addit ed file(s)	use, or misuse of ume the full of properly deleting redures, and
C:\Users\handst\Downlo			
☑ View files after extrac	ting		

The export will show six excel files that provide detailed information about the PATH report, as shown in the example below.

🕼 Q8-Q16.csv	Microsoft Excel Comma S	1 KB	No	2 KB	65%	11/4/2024 1:06 PM
Q17.csv	Microsoft Excel Comma S	1 KB	No	1 KB	45%	11/4/2024 1:06 PM
🖬 Q18.csv	Microsoft Excel Comma S	1 KB	No	1 KB	44%	11/4/2024 1:06 PM
🖬 Q19-Q24.csv	Microsoft Excel Comma S	1 KB	No	1 KB	62%	11/4/2024 1:06 PM
🖬 Q25.csv	Microsoft Excel Comma S	1 KB	No	1 KB	0%	11/4/2024 1:06 PM
Q26.csv	Microsoft Excel Comma S	2 KB	No	4 KB	64%	11/4/2024 1:07 PM

HUD Data Quality Report

This report reviews data quality across many HUD data elements.

Navigate to the HMIS Reports folder and select HUD Data Quality Report. A grant must be selected for this report. **Note:** This report can be generated for multiple projects at once.

X	Q Search	Reports / 2024 HUD Data Quality Report	🥦 4 8 00
٠	Continuum of Care	- 0	
?	_Modesto Users 2020	2024 HUD Data Quality Report	< 0
	Data Explorer	Organization	
	₩ Files on Server	Indicate which erganizations should be included in the report by selecting each organization separately, or click the 🤣 icon to select all. Note: The list only shows organizations you are authorized to view.	
	My Saved Reports	Organizatione* (CA) HOST House 🖉	
☆	> 🖿 BNLs	123	
	HMIS Exports	Appirent BUD Prevalence - Results - Behavioral Marine - Behavioral Assister - Researce - Provident	
	V 🗅 HMIS Reports		
	HMIS Data Entry	Grant Program	
	Timing Report	Use the Grant Program and Grant Component drop down selections to narrow down the list of Grants	
	 HUD Data Quality Report 	Grant Program HUD: CoC 🗸	
	HOPWA APR	Grant Component: SELECT	
	HOPWA		
	APR/CAPER		
	FY23	HMIS Reports - HUD Data not grants sheald be included in the report by selecting each grant separately, or click the & too to select al.	
	PIT Point in Time (2024)	Press (c) Eller (m. Orana (c)	- /
	Project	Quality Report Make sure you select the grant(s)	
	Descriptors Data Element(PDDE)	✓CES Coordinated Assessment	_
	Report		
	HUD Bed Night	Program	
	Report	A list of pogums based on the grant selected.	
	LSA Descriptor Quick Glance	Program Type: Coordinated Entry 👻	
	PATH Annual	Hitlis Projects/Programs Only; 🖉 🗿	
	Report (2024)	Program: 🖉 Filter by Program	
	System Performance		
	Measures	Select to provide Bird's Eye overview	N
	(FY24)	Detail Expert Select to provide detailed report (aggregate data)	
	Administrative Reports	Detail Export Cick the Run Export button to generate task to generate to separate task to generate a separate task	
	> HMIS Lead	Indicate the SSN Massing to be used in the Detail Expert .	
	Reports	501 Masking: 2000-000 - 0	
	Client Reports	Run Export	
	> 🗀 Enrollment		
0	Reports	Brogert B Schwidz	e Report Cancel
	> 🗀 Referral Reports		

Overview (Birds Eye View)

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

<	1	of 2	>	ÞI	0	\bigcirc		a	Search		Find N	lext		(?)	
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							•	DQ	or C	lients					
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Numb	per of Ad	ults (age	18 or 0	ver)				29		29					
Numb	per of Ch	ildren(un	der age	18)				8		8					
Numb	per of Pe	sons with	h Unkn	own Age	2			0		0					
Numb	per of lea	vers						36		36					
Numb	per of ad	ult leaver	s					28		28					
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Total	Number	of Stayer:	s					1		1					
Numb	per of Ad	ult Stayer	rs					1		1					
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Numb	per of Ch	ronically	Homel	ess Perso	ons			7		7					
Numb	per of yo	uth under	r age 2	5				5		5					
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Numb	per of chi	ld and ur	hknown	-age he	ads of ho	usehole	ł	1		1					
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			(5.2)												
	of Birth (3.3)			0		0		0		0		0.00%		

Detailed Report (Export)

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

Once you select Run Export, you will receive a pop-up in regards to exporting the encryption. If you choose to encrypt the export, you will need to create a password for the downloaded documents. If you record a password, as you will be asked to enter it to complete the download. Note: Some firewall and security measures may block any exports that have passwords. You may also de-select the Encrypt Export box, however, you must then select that you assume full responsibility of ensuring the security of the exported file(s) and any data continained within the document.

Export Encryption	
If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AE	Export Encryption
encryption that can only be decrypted using the password you provide. Strong passwords are nenforced here, but the password you provide must be at least 8 characters long. If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection this information. Indicate if the exported file(s) should include a header line at the beginning of the file that indic what each of the values in the CSV file represent and if values in the CSV should <i>always</i> be enclined used. Encrypt Export: Include Header Row in CSV File(s):	If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long. If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of
Always Quote CSV Values(s): ClientTrack is not responsible for the protection, use, or misuse of information contained in the exported file(s). I assume the full responsibility of ensuring the security of the exported file(s) and any da contained within Dor	Confirm Password:*

After completing the step above, you will be directed to wait for your export to finalize. You can monitor the progress of the export on <u>Asynchronous Tasks</u>. The encrypted set of files will display on your <u>Files and Server</u> page when it has completed. Please remember to refresh the Files on Server and Asynchronous tasks pages periodically if you are waiting on the export to finish.

Your report may take 20 minutes or longer to generate. Once your report is ready, download the file by selecting on the name. If you added a password, you will receive a pop-up asking you to enter the password and assume responsibility to download the file.

Q Search	Reports	🍢 4 🖱 😁
Senior Advocacy Network	- 0	
Modesto Users 202	Files on Server Find completed exports	
Data Explorer E Files on Server Wy Saved Report	Update taken is	used in an
BNLs HMIS Exports	Select on the report you Coasted Expires IMES.ARP.CAPER 2024 Watehtin_2024T05T1_Tabl0_N5470.exe Would like to download Deptherie hand 11/4/2025 557PM 11/4/2025 557PM	
→ 🗀 HMIS Reports	1865 APR 2024 Esport_2024104/19300_tabl0_H3408.ese	
HMIS Data Entr Timing Report	HHIS APR_CAPER 2024 Pre-Load 2_2024110417464H_TaskD_HI3468.exe Stephanie Hand 11/4/2024 5:46 PM 11/4/2025 5:46 PM	
Quality Report	HHIS APP., CAPER 2024 Pre-Load., 20241104173601, TaskiD., H3467.exe Stephanie Hund 11/4/2024 5:36 PM 11/4/2025 5:36 PM	
HOPWA APR/CAPER FY23	HUD Data Quality 2024_2024104164662_TaskD_H3466.exe] Stephanie Hund 11/4/2024 6.46 PM 11/4/2025 6.46 PM	٠
PIT Point in Tir (2024)		
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> 🗅 HMIS Lead Reports		
> 🗅 Client Reports		
C Enrolment Reports		

ClientTrac			
they may contain personally continued protection of this the information contained v responsibility of ensuring th this data once it is no longer	videntifying information in plain text information. Data Systems Internati vithin the file(s). By checking the foll e security of the file(s) and any data r needed. Users of this extraction too	information. Once the file(s) have been extracted t. All appropriate cautions should be exercised to onal (DSI) is not responsible for the protection, us owing box, you acknowledge that you will assum contained within, including the responsibility of f I should consult their employer's policies, proced of personally identifying information for addition	ensure the se, or misuse of the full properly deleting lures, and
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Review further in this guide for more information about the Validation Report.

Validation Reports

You can use the Validation Report for CSV-APR, CSV-CAPER, and DQ Detailed Export to show you client level data to help you correct any data issues that may show on your report. The report will be broken down into multiple different excel documents that contain different information. **Note:** The CSV-APR, CSV-CAPER, and DQ Detailed Export all have different detailed categories. You can then begin opening each file and review any missing data or address any data issues.

APR_2024_Annual_Detail.csv	11/4/2024 8:46 AM	Microsoft Excel C	4 KB
APR_2024_DEMOGRAPHICS_Detail.csv	11/4/2024 8:46 AM	Microsoft Excel C	12 KB
APR_2024_Entry_Detail.csv	11/4/2024 8:46 AM	Microsoft Excel C	18 KB
APR_2024_Exit_Detail.csv	11/4/2024 8:46 AM	Microsoft Excel C	8 KB
APR_2024_MostRecent_Detail.csv	11/4/2024 8:46 AM	Microsoft Excel C	1 KB
DQ_1_Detail (Validation Only).csv	11/4/2024 8:46 AM	Microsoft Excel C	32 KB
DQ_2_Detail (Validation Only).csv	11/4/2024 8:46 AM	Microsoft Excel C	1 KB
DQ_3_Detail (Validation Only).csv	11/4/2024 8:46 AM	Microsoft Excel C	1 KB
DQ_4_Detail (Validation Only).csv	11/4/2024 8:46 AM	Microsoft Excel C	13 KB
DQ_5_Detail (Validation Only).csv	11/4/2024 8:46 AM	Microsoft Excel C	4 KB
DQ_6_Detail (Validation Only).csv	11/4/2024 8:46 AM	Microsoft Excel C	14 KB
DQ_7_Detail (Validation Only).csv	11/4/2024 8:46 AM	Microsoft Excel C	1 KB
DQ1.csv	11/4/2024 8:46 AM	Microsoft Excel C	1 KB
DQ2.csv	11/4/2024 8:46 AM	Microsoft Excel C	1 KB
DQ3.csv	11/4/2024 8:46 AM	Microsoft Excel C	1 KB
DQ4.csv	11/4/2024 8:46 AM	Microsoft Excel C	1 KB
DQ5.csv	11/4/2024 8:46 AM	Microsoft Excel C	1 KB
DQ6.csv	11/4/2024 8:46 AM	Microsoft Excel C	1 KB
🖬 DQ7.csv	11/4/2024 8:46 AM	Microsoft Excel C	1 KB

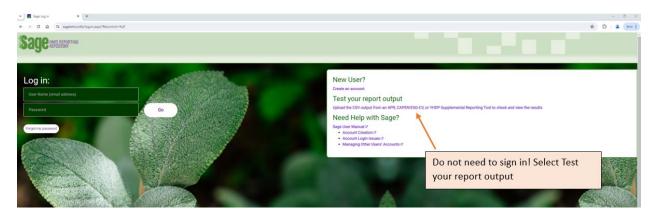
We will use the DQ Detailed Export, DQ_2 Detail (Validation Only) as an example below. The validation will show any Client Doesn't Know/Prefers Not to Answer responses, missing data, and/or data issues.

Data Element	clientid	Name	Client Doesn't Know/Prefers Not to Answer	Missing	Datalssue Datal	ssue EnrollID	EnrollDate	ExitDate	ProgramName	
Social Security Number (3.2)	53026	Pizza, Small	Yes			137456	11/10/2023 0:00	11/10/2023 0:00	CES Coordinated Acc	ess
Social Security Number (3.2)	53027	Pizza, Tiny	Yes			137457	11/10/2023 0:00	11/10/2023 0:00	CES Coordinated Acc	ess
Social Security Number (3.2)	53028	Pizza, Big	Yes			137458	11/10/2023 0:00	11/10/2023 0:00	CES Coordinated Acc	ess

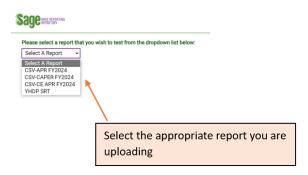
REMINDER: YOU CAN NOT CHANGE THE DATA ON THE EXCEL SPREADSHEET, YOU MUST CHANGE THE DATA IN HMIS

Sage HMIS - Generate a Report

The CSV-APR and the CSV-CAPER can be uploaded into Sage HMIS. You do not need a log in to verify or generate your APR report in Sage HMIS. Visit <u>www.sagehmis.info</u> and select the **Upload a CSV output....** to generate a paper report link.



Select the appropriate report you will be uploading.



Select Choose File and when your documents show, choose the file you want to upload. This document should NOT have client level data. Click on the correct file you wish to upload and then Open. **Note:** The document uploaded should be the "export" file and cannot be opened before uploading. This will cause an error.

Sage water ***	
Test a CSV-CAPER FY2024	
O This testing page will only allow a single project in your CAPER.	
Sage requires a CSVCAPER generated by your HMIS (or comparable data base for DV providers) in a .zip file, to be uploaded to the system. Follow the steps below to test your CS and/or to create a printable version of your CSVCAPER.	SV € Open × ← → → ↑ ↓ This PC → Downloads v ⊘ Search Downloads P
 Download the CSV-CAPER from your HMIS or comparable database and save it to your computer. Remember where you place it – so you can find it. Click the browse button below. Your computer's file directory will appear. Find the CSV-CAPER Report you saved and double click on it. 	Organice - New folder
3. Check the box next to '1 am not a Robot' and complete the verification steps if necessary.	vanie vanie yyre ↓ Vite mounes yyre
4. Click on "Upload and Test" button to upload the file from your computer to Sage.	hmis caper 2024 export_20241104195639 11/4/2024 1:24 PM Compressed (zipp
5. A results message will show:	hmis path 2024 - fy24 v1.3,202411041907 11/4/2024 11:35 AM Compressed (zipp
If there are no errors in the file Sage will tell you the CSV passed. Click the "Create Report" button and Sage will produce a printable version of your CAPER.	File name: hois caper 2024 export, 202411041 v Compressed (zipped) Folder (". v
If there are errors, you will need fix the problem(s) in your HMIS or comparable database and download a new CSV-CAPER.	Upload from mobile Open Cancel
You can enter your email address and click 'Go' if you want a copy of the errors sent to you. Refer to the Sage guidebook in the Resources tab for additional instructions.	
6. If you want to test another CSV, repeat the process outlined above.	`
Choose File No file chosen	Upload the "export" file
	opioad the export the
I'm not a robot	
In CAPTCHA Privaty - Terms	
Upload and Test	

The testing results will show if the upload has passed all validations. This screen provides an overview of the report. Once you verify the project and date range, select View Your Upload to create and view the full detailed report.

✓ The uplo	ad has passed a	esults - 11/4/2024 all validations. s and Report Validati		sk 'Create Report'.												
TEP 1: Verify to Q4a. Project Ide		ect project for the	correct date	range												
Organization name	Organization	Project name	Project ID	HMIS Project Type	RRH Subtype	Coordinated Entry Access Point	Affiliated with a residential project?	Project IDs affiliated with	CoC Number	Geocode	Victim Service Provider	HMIS Software Name	Report Start Date	Report End Date	Total Active Clients	Total Active Households
Salvation Army ESG	SAL	TSA Emergency Shelter	19611	0		0			CA-510	062292	False	ClientTrack by Eccovia v20	11/4/2023	11/4/2024	122	118
Q5. Report Vali		f clients being rep	orted on to I	be sure you have the												
Category				Count of Clients for DO												
1. Total number of				12		122										
2. Number of adult				12	1	121										
 Number of child Number of perso 					1	0										
 Number of perso Number of leave 		age				3										
6. Number of adult						3										
7. Number of adult		ehold leavers			3	3										
8. Number of staye	ers			119	9	119										
9. Number of adult	t stayers			110	B	118										
10. Number of vete	erans				7	7										
11. Number of chro	onically homeless	persons		57	7	57										
12. Number of your	th under age 25			4	4	4										
13. Number of pare	enting youth under	r age 25 with children		0	D	0										
14. Number of adu	It heads of house	hold		118	В	118										
15. Number of chil	ld and unknown-ag	e heads of household			D	0						-				
16. Heads of house	eholds and adult s	tayers in the project 36	5 or more days	115	5	115	This is not t	ho full ron	ort C	alact	View					
		erything is correct					This is not t	ne iun rep	011. 5	elect	view					

The complete report will generate. Verify all the information is correct. You can print the full report from this screen. **Note:** You cannot change the data in Sage HMIS. For any data issues, you must return to HMIS to change the data.

 Q04a: Project Ide 	ntifiers in HMIS																
Organization Org Name ID	Project Name			lethod for racking ES	Affiliated wi residential p	h a roject	Project IDs of affiliations	CoC Number	Geocode	Victim Service Provider	HMIS Software Name	Report Start Date	Report End Date	Total Active Clients	Total Active Households	CSV Exception?	Uploaded via emaile hyperlink?
Salvation Army SA ESG	Shelter		0					CA-510	062292	0	ClientTrack by Eccovia v20	2023-11-04	2024-11-04	122	118	No	No
 Q05a: Report Val 	nultiple project rows in Q4 will display	r as separate r	rows here using the	same value in Pro	oject Info Row I	λ.											
Category			Count of Clients fo	r DO Count of	Clients												
bategory			obuilt of olicity fo	i bigʻi obullit ol	Circinca												
Total Number of Person	s Served		122	122													
Number of Adults (Age	18 or Over)		121	121													
Number of Children (Un	ier Age 18)		1	1								Use to	copy	the info	ormation	to you	r
Number of Persons with	Unknown Age		0	0													
Number of Leavers			3	3								clipbo	ard				
Number of Adult Leaver	3		3	3													
Number of Adult and He	ad of Household Leavers		3	3													
Number of Stayers			119	119													
Number of Adult Stayers			118	118													
Number of Veterans			7	7													
Number of Chronically F	lomeless Persons		57	57													
Number of Youth Under	Age 25		4	4													
Number of Parenting Yo	uth Under Age 25 with Children		0	0													
Number of Adult Heads	of Household		118	118													
Number of Child and Un	known-Age Heads of Household		0	0													
	nd Adult Stayers in the Project 365 Da			115													
	uestion includes separate columns fo		ant to the DQ questio	ons and totals rele	evant to the ent	re APR. Data upl	oaded prior to 1/1	1/2023 has been l	oulk updated to	o use the same tota	Is for both columns in	order to support calc	ulations in the A	ggregator.			
- Quoa. Data Quali	ty: Personally Identifying Info Client Doesn't Know/Prefers Not to		Information Missing	Data Issues	Total % o	Issue Rate											
			-														
Name	0		0	0	0 0%												
Social Security Number			0	2	4 3.2	15											
Date of Birth	0		0	0	0 0%												
Race/Ethnicity Gender	0		0	0	0 0%												

CES Coordinated Access Data Entry

Coordinated Entry (also known as a Coordinated Assessment System) is a consistent, communitywide process to match people experiencing homelessness or at risk of homelessness to community resources. The organization in HMIS is a shared project among different users from different agencies across the Continuum of Care.

You will have access to more than one organization. The menu will appear here under the organization section. It is <u>critical</u> that you make sure to change to the correct organization: <u>Continuum of Care</u> when entering ALL the CES Assessments into HMIS. **Note:** If any part of the Release of Information is not signed or initialed, contact HMIS and <u>DO NOT ENTER</u> the client.

Q Search <	Horize / Welcome Stephanie Hand						Settings	
Continuum of Care	Stephanie Hand Continuum of CareModesto Users 200	20 11						
_Hodesto Users 2020	Weith me Stephant, Hand						PROFILE	
(1) User Dashboard	Continuum of Care not	N		6.0	1:			
③ Data Explorer			tice Continuum	of Care	e listed here if		Stephanie Hand	
Current Envollments w/ Most Recent Assessment	Community Services Agen: Stanislaus County	🕙 you are log	ged under the	correct	organization		handst@stancounty.com Modesto Testing	
A Hy ClentTrack	Welcome to ClientTrack						Sign Out	
Case Load							ACCOUNT SETTINGS Workgroup	
Entry By Name	The HMIS System for Stanislaus Com	munity System of Care Collab	orative				_Modesto Users 2020	
List (BNL)	Administered by Stanislaus County C	Community Services Anency (C	142				Organization	
B HHP Reporting	county c	and an incest agency to					Continuum of Care	
Ded and Unit.	Contact Information: HMIS Administrator: Lynnell Fuller (209) 558-3676.	Email: Fully@stancounty.com					Location 1	
A Quick Services -							Stanistus Community Syst	tem of 0
Multiple Clients	Help Information: Use the Help Topics link or contact the HMES Admi	inistrator.						
My Information								
My Team O Change My							THEME	
Password	My Case Assignments			œ	Current Program Enrollments			-
Paused Operations		4 results found.			ProgramName CCD SSVF RRH	Make sure you a lo		1111
E My Submitted	Client Name 11	Begin Date End C			CES Coordinated Access	under Continuum	of Care Default High	Contra
Day Center Administration	40 Allen, Fayzon	06/18/2024	CES Coordinated Access					
E Testing Menu	4) Borba, Gilbert Westly	05/28/2024	CES Coordinated Access					
Group Chobal	4) Navarro, Beatriz Adriana	06/18/2024	CES Coordinated Access				Dark	
Administration	+) Sragroso, Santiago	06/18/2024	CES Coordinated Access				Open Workgroup Designer	
							Security Settings	
						Name of Contract o	Clear Preferences	

Client Data Entry

Refer to the <u>Entering Client Information and Managing Project Enrollments</u> for a reminder on how to enter client data for an enrollment. **Note:** some data elements are not required for CES, therefore the workflows may appear differently. If you have any questions regarding what should and should not be collected, please contact HMIS.

For Coordinated Entry, the project name will be listed as CES Coordinated Access. If you do not see this project on the Program Enrollment screen, please pause your workflow and check your organization. If you accidently started an enrollment under the wrong organization, contact the HMIS team to remove any recorded assessments.

Self-Sufficiency Matrix

Self-Sufficiency Matrix is an evaluation tool that measure's a client's ability to live independently at a specific point in time. A Self-Sufficiency should be recorded upon entry into CES and is considered an incomplete enrollment without one.

The workflow will ask you if you would like to complete the Self Sufficiency Matrix. Select Yes to complete the document. Selecting No will take you to the next assessment, the Triage Assessment.

(2322/18589) * 5/15/1991	Man (Boy, if child) ClientID A (a 🛛		
 Basic Client Information 				
⊘ Family Members				
Program Enrollment				
✓ ★ Lopez King, Jesus Michael				
 Universal Data Assessment 				
© Translation Assistance Needed				
 Self Sufficiency Matrix 				
O Triage / Crisis Needs Assessment				
Complete Housing Needs Assessment?				
Pause X Cancel				
		Self Sufficiency Matrix	✓ Yes	
		Would you like to complete Self Sufficiency Matrix?	× No	

After completing the form, the system will automatically calculate the Matrix Score total.

Issus Lopez King Man (Boy, if child) ClientID A 🛱 🕄		
Self-Sufficiency Matrix		< ⊖
	Q 3 - Transportation is available and reliable but limited and/or inconvenient; drivers are licensed and minimally insured	
	4 - Transportation is generally accessible to meet basic travel needs	
	5 - Transportation is readily available and affordable; car is adequately insured	
	🗇 6 - Not applicable	
Community Involvement:*	1 - Not applicable due to crisis situation: in "survival" mode	
	2 - Socially isolated and/or no social skills and/or lacks motivation to become involved	
	3 - Lacks knowledge of ways to become involved	
	4 - Some community involvement (advisory group, support group) but has barriers such as transportation. childcare issues	
	5 - Actively involved in community	
	🔾 6 - Not applicable	
Safety:*	1 - Home or residence is not safe; immediate level of lethality is extremely high; possible CPS involvement	
	O 2 - Safety is threatened / temporary protection is available; level of lethality is high	
	🗇 3 - Current level of safety is minimally adequate; ongoing safety planning is essential	
	4 - Environment is safe,however, future of such is uncertain; safety planning is important	
	5 - Environment is apparently safe and stable	
	C 6 - Not applicable	
Parenting Skills:*	1 - There are safety concerns regarding parenting skills	
	2 - Parenting skills are minimal	
	3 - Parenting skills are apparent but not adequate	
	4 - Parenting skills are adequate	
	5 - Parenting skills are well developed	
	O 6 - Not applicable	
Credit History:*	0 1 - No credit history	
	2 - Outstanding judgments or bankruptcy/foreclosure	
	3 - Has a credit repair plan	
	4 - Moderate credit rating	
	5 - Good credit / manageable debt ratio	
	6 - Not applicable	
	Total score	
Matrix Score Summary		
The Matrix Score calculates the average of all domain scores between 1 and 5, excluding domains where Not Ap		
	Save 🗸 No C	Changes

HMIS Triage Assessment

The HMIS Triage Assessment records the client's Current Living Situation, potential length of stay in their situation (contingent on the response), if there was conflict in their situation, and if their health or safety was at risk.

Intake 2024 (2322/1B589) *	Jesus Lopez King 5/15/1991 Man (Boy, if child)	ClientID	
	HMIS Triage Assessment		< 8
 Family Members Program Enrollment 	Assess the clients current situation	with the questions below. This data can be used for prioritization of service	vices needed for the client.
✓★ Lopez King, Jesus Michael	May be	Assessment Date:*	e* 05/33/2024 1
© Universal Data Assessment	different	Assessment Date: * What is your household type: *	
 Translation Assistance Needed 	than Prior		
Self Sufficiency Matrix	Living	Enrollment:* Verified by Project:	
 Self Sufficiency Matrix 	Situation		
 Triage / Crisis Needs Assessment 	Current Living Staaton morning	Current Living Situation:*	n:* Place not meant for habitation
Complete Housing Needs Assessment?		Unsheltered Detail: *	ãe* Living in carc truck or van →
III Pause X Cancel	Record a Contac	ct or	Provided answers
	Service here	Record Contact:	
		Is there violence or conflict in the place you were staying last night:"	
		Is your health or safety at risk in the place you were staying last night:*	te* Ves V
			Save 🗸 No Changes

VI-SPDAT

The VI-SPDAT provides a vulnerability score which is used to identify and prioritize clients for the most appropriate support and housing interventions that might be available in the community. An enrollment needs a VI-SPDAT to be complete and will be removed if a VI-SPDAT is not completed.

The workflow will ask you if you would like to complete the VI-SPDAT. Select Yes to complete the document. Selecting No will take you to the next assessment, the end of the workflow.

	Terre Leave Man		OllashiD						
take 2024 * 322/1B589) *	Jesus Lopez King 5/15/1991	Man (Boy, if child)	ClientID 53376	4 ₿					
Basic Client Information									
Family Members									
Program Enrollment									
Lopez King, Jesus Michael									
 Universal Data Assessment 									
 Translation Assistance Needed 									
Self Sufficiency Matrix									
) Self Sufficiency Matrix									
) Triage / Crisis Needs Assessment									
Complete Housing									
ause X Cancel					Complete Housing Needs Assessm	ient?	C Yes		
					Complete Housing Needs Assessment?		► No		

You will then be asked what type of VI-SPDAT you would like to complete for the client.

Intake 2024 (2322/18569) 9 Bais Client Information 9 Fangle Envolvence Wethat Assessment 9 Translate Assessment 9 Translate 9 Stafficknery Matrix 9 Stafficknery Matrix 9 Stafficknery Matrix	3) 3) 199	y, if child) 53376	a m Ω.		
Complete Housing Needs Assessment?				VI-SPDAT (Single Adult)	
VI-SPDAT Type Pause X Cancel			VI-SPDAT Type Select the VI-SPDAT type being used	F-VI-SPDAT (Family)	
				TAY-VI-SPDAT (Single Youth 18-24)	

Once the type of VI-SPDAT is selected, you will be prompted to enter the information. **Note:** The interviewer's name will auto populate to the user's name. If the name is different on the form, the name will be adjusted.

	Desus Lopez King Man (Boy, If child) Client80 ↓ ↓ 箇 □ Ω	
Basic Client Information	Vulnerability Index (VI) and Service Prioritization Decision Assistance Too	I (SPDAT) × 0 ₫ θ
 Family Members Program Enrollment 		ntflack Inc. is licensed to include these tools within Clentificak. The terms of this license require that users must be trained on the use and implementation of the tool by OrgCode Consulting. Inc. or an DAT or F-W-SPDAT forms without permission and written consent from Community Solutions and/or Org Consulting. Inc.
✓★ Lopez King, Jesus Michael		
 Universal Data Assessment 	Administration VISPDAT 3.0	The interview name will auto populate the
 Translation Assistance Needed 	Assessment Active	user's name & may need to be adjusted
 Self Sufficiency Matrix Self Sufficiency 	ClientID: 53376 Interviewer Name: Stephanie Hand	
Matrix Original Triage / Crisis Needs	Agency: Team © Staff Volunteer Assessment Level: • Housing Needs Assessment •	Dute/Terrer: * 05/21/2024 🗎 09:00.4M
Assessment Complete Housing Needs Assessment? VI-SPDAT Type	Enrollment: 05/33/2024 - 06/22/2024 - CES Coordinated A Assessment Contact Type: In Person Assessment Time Start: 05/33/2024	Assessment Location: * Stanislaus Community System of Care Assessment Time End: 05/31/2024 Stanislaus Community System of Care
⊙ VI-SPDAT v3	Basic Information	
Pause X Cancel	First Name:	Jenus
	Last Name:	Lopez King
	Nickname:	
	Race:	Anternetican Indian. Mainsk afters or Indigenous Anternetican with American With American
	Sec Sec No:	621 - 33 - 5285 enrollment
	Birthdate:	05/15/1991
	Gender:	• Man (Boy, if child)
	Identifies as LGBTQ2+?	O Yes O No
	In what language do you feel best able to express yourself? Age at Assessment:	English v 33
	uffic as westerniser	33 Ø fare
		U Save

Complete the VI-SPDAT. HMIS will auto populate the final score for you. Select Save when finished.

	Jesus Lopez King 5/15/1991 Man (Boy, if child) 53376	a D	
	Vulnerability Index (VI) and Service Prioritizatio	n Decision Assistance Tool (SPDAT)	< 🕀
Information	а, впрассь учин не нта перачие way письскауь.		
Family Members	b. Makes it hard to access housing:		
Program Enrollment	c. Would require assistance to maintain housing:	Ves ONo Prefers not to answer ONA	
Lopez King, Jesus Michael		If YES to any of the Question 26, score 1.	
© Universal Data Assessment			
 Translation Assistance Needed 	26. Are there any medications that, for whatever reason:		
 Self Sufficiency Matrix 	a. A doctor said you should be taking but are not taking:	○ Yes Q No ○ Perfers not to answer ○ NA	
 Self Sufficiency Matrix 	b. You sell instead of taking:	Vies O No O Prefers not to answer O NA	
Triage / Crisis Needs	c. You use in a way other than how it was prescribed:	Yes Q No ○ Prefers not to answer ○ NA	
Assessment	d. You find impossible to take, forget to take or choose not to take	Yes Q No ○ Prefers not to answer ○ NA	
 Complete Housing Needs Assessment? 		If YES to any of Question 26, score 1.	
Ø VI-SPDAT Type			
⊙ VI-SPDAT v3	27. Has your homelessness been caused by any recent or past tra	ma or abuse? O Yes No O Prefers not to answer	
III Pause X Cancel		If YES to any of Question 22, score 1.	
	FINALSCORE:	Final score auto populated here	
	Course of Action 8+ Assess for high intensity supports las	Final score auto populated here	
	CONTACT INFORMATION		
	On a typical day, what is the best way to reach you?	partied at Lincoin Park	
	When?	Orrnings Afternoon Evening Night Any	-
	If that is unsuccessful, what is the next best way to reach you?	209-123-4567	
	Prioritization Status:	Placed on prioritization list	
			Save Save

Completing CES Intake Workflow

Once all the information is completed, you will see the Finish screen. It is important to select Finish to complete the workflow. Return to the Client's Dashboard and review the enrollment for accuracy. To review how to check the enrollment for accuracy, visit <u>Complete Intake Workflow</u>.

YOU HAVE COMPLETED YOUR ENROLLMENT!

Entering an Updated VI-SPDAT or Self-Sufficiency Matrix

VI-SPDAT

Start on the Client Dashboard and navigate to the SPDAT Assessments folder on the left-hand side of the screen. The select the appropriate SPDAT folder.

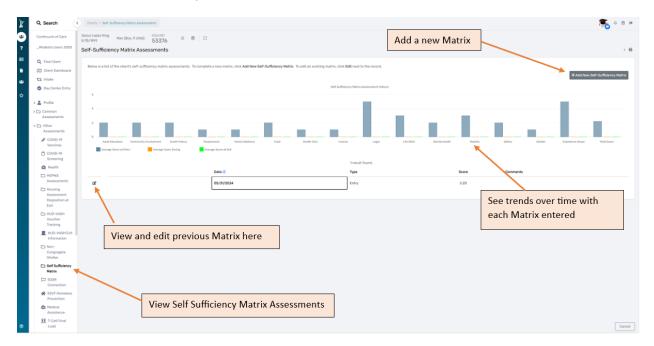
) Q Search	C Units / Janua Legent Krigh Guelmanet	۰ 🐔	8 0
Continuum of Care	3mms topes King Brist/1999 Max/Box, if cristal 53376 0 ⊞ 12		
P_Hodests Users 2020	Jesus Lopez King's Dashboard		*
Q. Find Clent () Client Dashboard	Jesus Lopez King's Information	В,	-
ti intake			
Day Denter Entry	STANISLAUS TEST		
> Profile > Common Assessments	Rume Lopa Eig Souch Hohar Birth Dee: 5/5/991	Age: 33	
> D Other Assessments > D Enrollment and Services	Client B 53376 Rate: Thios, Alward Alwarda, or Alward, Higherich, Latinship		
PHY Assessments SPDAT Assessments	Jesu's Excellments	18	-
D VI-SPDAT	2 Heards Name.		
DO-VI-SPDAT	Constant Active Requested Project Start Date::: Request Bart Date::: Request Bart Date::: Core: 0 Email:Di::: Days Emailed::: Date:::	Program Type	
> A Coordinated Access (Read-Only)	✓ bitsd ✓ Constant Dity		-
	CES Coordinand Access 0 Prosented without Children 65312824 56252824 56252824 56252824 56252824 56252824 56252824	14	

On this screen, you will be able to view and edit the previous VI-SPDAT and add a new one. **Note:** If you are adding a family VI-SPDAT, the enrollment size must be greater than one individual. The family VI-SPDAT must be added on the head of household.

X	Q, Search	Clients / VI-SPDAT/F-VI-SPDAT History		🌉 4 m 🖷
۲	Continuum of Care	Desus Lopez King 5/15/1991 Man (Boy, if child) ClientID 53376 0 0 0 1		
?	_Modesto Users 2020	VI-SPDAT/F-VI-SPDAT History		< 0
	Q Find Client		onsulting. Inc.	d inspendentiation of the test by GrgCola Computing, the or an approved and certified trainer of + Add New VECPCAT Advectment Score Socialization Score Socialization Score Socialization Score Socialization
	Other Assessments Enrollment and Services	Single Adult vS 05/31/2024 9:00AM		11
	Birridas ⇒ Dir Pitr/Assessments Assessments Di Vi-SPOAT Di Vi-SPOAT Di Vi-SPOAT Di Vi-SPOAT Di Vi-SPOAT Di Vi-SPOAT Di Vi-SPOAT Di Pitr/AspOAT Di Pitr/AspOAT	View and edit previous VISPDAT here		Select the appropriate VISPDAT you would like to add
Ð				Cancel

Self Sufficiency Matrix

Start on the Client Dashboard and navigate to the Other Assessments folder on the left-hand side of the screen. Then select the Self Sufficiency Matrix folder.



Coordinated Access (Read-Only)

CE Assessments

This screen will show a list of all the Master Assessments created for the CES Coordinated Access project.

						🥦 e 🖷
	n Arroyo Man (Boy, if child) 5 5/1991 Man (Boy, if child) 5	Clientitio 4 🗎 🖸				
pp		53415				
	ster Assessments					<
Day Center Entry	Daless is a list of Master Assessment	ts that have been created for this client. Please use the HMIS w	and filmer to add as will assume the			
🚊 Profile	below is a list of master Assessment	is dischare been created for this crent, Prease use the Prins w				
Common			3 results found.			
Assessments	Date II	Program	Туре	Assessor	Comments	AssessID
C Other Assessments	10/01/2024	CES Coordinated Access	Exit	Stephanie Hand		22990
C Enrolment and	09/15/2024	CES Coordinated Access	During Program Enrollment/Update	Stephanie Hand		22989
Services	09/01/2024	CES Coordinated Access	Entry	Stephanie Hand		22989
C RHY Assessments						
C) SPDAT						
Assessments						
Coordinated Access (Read-Dnly)						
Assessments						
CE Barriers						
Vaccines						
Vaccines						
Vaccines CE Domestic Violence CE Enrollments CE Financial						
Vaccines CE Domestic Violence CE Enrollments CE Financial CE Housing						
Vaccines CE Domestic Violence CE Enrolments CE Financial CE Housing Assessment Disposition at						
Vaccines CE Domestic Violence CE Erenoliments CE Financial CE Housing Assessment Disposition at Exit						
Vaccines CE Domestic Violence CE Enrolments CE Financial CE Housing Assessment Disposition at						
Vaccines CE Domestic Violence CE Enroliments CE Financial CE Housing Assessment Disposition at Exit CE Release of						
Vocines CE Domastic Vocience CE Enroliments CE Enroliments CE Housing Assessment Disposition at Ent CR Housing CI Self Sufficiency						
Vaccines Vaccines CE Danastis CE Envoltments CE Envoltments CE CF Invancial CE Providing Assessment Depotition at Exit CE Relative of Information CC Staff Sufficiency Matrix						
Vaccines C Domestis Volence C E Brodinents C E Francial C E Housing Assessment Depotion at Exit C E Relate of Information C E Set Set C E Set C E Set						
Vaccines Vaccines CE Danastis CE Envoltments CE Envoltments CE CF Invancial CE Providing Assessment Depotition at Exit CE Relative of Information CC Staff Sufficiency Matrix						
Vaciente CD Demethic Volence CD Demethic Volence CD CE Provinents CD CD Financial CD CE Financial CD CE Housing Assessment Disposition at Exit CD CE Relative of Information CD CD SetDat CC TavVui-						

CE Enrollments

This screen allows for users to see if client's have been or are currently enrolled in other projects. This information can be useful in determining case management collaboration, to avoid overlapping enrollments, or to see if a client is enrolled in Coordinated Entry. You will be unable to view the assessments completed by the organizations.

	Jasper King	Man (Boy, if child)	e 0						
rofile	8/15/1961	Man (Boy, if child) 53033							
mmon sessments	Enrollmen	ts							* 0
ther	All of client's	s enrollments display below. An enrollment repres	ients a defined period of p	articipation in a grant and/or prog	ram. From here, you can enroll a client in	a program, exit them from a	n existing program or perform ann	ual assessment updates.	
isessments					5 result	s found.			
ollment and vices		Enrollment Description	Case Members	Project Start Date 11	Housing Move-In Date	Exit Date 11	Exit Destination	Organization	
HY Assessments	~ Curren	ıt							
PDAT sessments	Q	CSA TEST ES	2	08/14/2024				(CSA) Stanislaus County Community Services Agency	
ordinated cess (Read-Only)	Q	CCD SSVF HP	1	07/26/2024				Catholic Charities Diocese of Stockton	
CE Assessments	Q	WE CARE WINTER SHELTER	1	08/30/2023				We Care	
CE Barriers	Q	CHSS HDAP RRH	1	08/15/2023				Community Housing and Shelter Services	
CE COVID-19 Vaccines	V Previou	us							
CE Domestic Violence	Q	WE CARE WINTER SHELTER	1	09/01/2022		09/23/2022	Jail, Prison, Juvenile De	We Care	
CE Enrollments									
CE Financial									
CE Housing Assessment Disposition at Exit									
CE Release of nformation									
CE Self Sufficiency Astrix									
CE VI-SPDAT									
CE TAY-VI- SPDAT									
CE Universal Data									

CE Release of Information (ROI)

This screen allows the user to be directed to the Client Files page to view any uploaded ROIs.

	Clients / Client Fine	🥵 ¢ 🖻 🕫
Q Find Client	Regen Arman Main (Doy, if called) 53445 0 🗎 😳	
t1 Intake	Client Files	×050 0
Day Center Entry		
> 🚊 Profile	Documents or other files may be stored electricitarily by upbading them have. Dirigitary: Konis Grid	
> Common		
Assessments	Tread from 2	
> 🗅 Other Assessments	To the second	
C Enrollment and Services		
> 🗅 RHY Assessments		
> C SPDAT Assessments	R0110.30.2024	- L.
✓▲ Coordinated Access (Read-Only)	Release of Informati	
CE Assessments		
CE Barriers		
CE COVID-19 Vaccines		
CE Domestic Violence		
CE Enrolments		
CE Financial		
CE Housing Assessment		
Disposition at Exit		
CE Release of Information		
CE Self Sufficiency		
Matrix		
CE VI-SPDAT		
CE TAY-VI- SPDAT		
CE Universal Data		
Lata		
		Cancel

CE Self Sufficiency Matrix

This screen allows the user to view all Self Sufficiency Matrix Assessments for clients. You may select the viewfinder button to view each recorded assessment.

)r	Q Search	Clients / Self-Sufficiency Matrix Assessments			🥵 A 🖻 🕫
	Q Find Client	Ryan Arroyo Man (Boy, If child) ⊂lientit0 53/417991 Man (Boy, If child) 53/415			(0
	11 Intake	Self-Sufficiency Matrix Assessments			()
	Day Center Entry	Below is a list of the client's self-sufficiency matrix assessments. This form is intended for reviewing previously entered as	sessments.		
	> 🛔 Profile		1 result found.		
*	> Common Assessments	Date i	Type	Score Comments	
\$	> 🗅 Other Assessments	Q 09/01/2024	Entry	2.20	
	> Enrollment and Services				
	> RHY Assessments				
	> C SPDAT Assessments				
	Coordinated Access (Read-Only)				
	C CE	View the details of the			
	Assessments	assessment here			
	CE COVID-19 Vaccines				
	CE Domestic Violence				
	CE Enrollments				
	CE Financial				
	CE Housing Assessment Disposition at Exit				
	CE Release of Information				
	CE Self Sufficiency Matrix				
	CE VI-SPDAT				
	CE TAY-VI- SPDAT				
	CE Universal				
۲	Data				Cancel

	Clents / Self-Sufficiency Matrix Assessments / Self-Sufficiency Matrix Name		🍋 A
Q Find Client	Ryan Arroyo Systyr991 Man (Boy, if child) 53415 0 🖨 🖸		
Client Dashboard	Self-Sufficiency Matrix		× 0
Intake Day Center Entry	Sell-Sufficiency Matrix		~ •
O Day Center Entry	Rate the client's level of self-sufficiency at the assessment point-in-time on a scale of 1 to 5 in each domain below based in	on the descriptions provided. Select "Not Applicable" if a domain is not applicable for the client.	
Profile			
Common Assessments		Assessment	
C Other		Date Program Type User	
Assessments		9/1/2024 CES Coordinated Access Entry Stephanie Hand	
Enrollment and Services	Assessment Date: *	9/1/2024	
C RHY Assessments	Assessment Type:*	Entry	
C SPDAT	Comments:		
Assessments	Income:*	1 - No Income	
Access (Read-Only)	Employment:*	1-No.Job	
D CE			
Assessments	Housing:*	1 - Homeless or threatened with eviction	
CE Barriers	Food:*	2 - Household is on food stamps	
Vaccines	Childcare:*	6 - Not applicable	
CE Domestic Violence	Children's Education:*	6 - Not applicable	
CE Enrollments			
CE Financial	Adult Education:*	2 - Enrolled in literacy and/or GED program and/or has sufficient command of English to where language is not a barrier to employment	
CE Housing Assessment	Legal:*	5 - No felony criminal history and/or no active criminal justice involvement in more than 12 months	
Disposition at	Health Care:*	1 - No medical coverage with immediate need	
Exit	Life Chiller	3 - Can meet most but not all daily living needs without assistance	
Information			
C CE Self Sufficiency	Mental Health:*	2 - Recurrent mental health symptoms that may affect behavior but not a danger to self/others; persistent problems with functioning due to mental health symptoms	
Matrix	Substance Abuse:*	5 - No drug use/alcohol abuse in last 6 months	
CE VI-SPDAT	Family Relations: *	1 - Lack of necessary support from family or friends: abuse (DV, child) is present or there is child neglect	T
CE TAY-VI- SPDAT	Start Carlo and Start Carlo Ca	3 - Transportation is available and reliable but limited and/or inconvenient: drivers are licensed and minimativ insured.	
CE Universal			
Data	Community Involvement:*	2 - Socially isolated and/or no social skills and/or lacks motivation to become involved	_

CE VI-SPDAT & CE TAY VI-SPDAT

This screen allows the user to view all VI-SPDATs for clients. You may select the viewfinder button to view each recorded assessment. **Note:** CE VI-SPDAT will show Single Adult and Family VI-SPDATs. The Family VI-SPDAT will only show on the head of household. The CE TAY VI-SPDAT will show any recorded TAY VI-SPDATs.



)r a	Search	Clients. / VI-SPDAT/F-VI-SPDAT History. / Vulnerability Index (VI) and	d Service Priori	tization Decision Assistance Tool (S	(POAT)					1 0 0	j (+
	Find Client	Ryan Arroyo Man (Boy, if child) ClientID	e.								
-	Client Dashboard	5/10/19/1									
L+	Intake	Vulnerability Index (VI) and Service Prioritizati	on Decisi	on Assistance Tool (Si	DAT						< 0
	Day Center Entry	OrgCode Consulting Inc. and Community Solutions are the autho Licensor. It is not permissible to alter the wording or scoring of th						that users must be trained on the use and imp	elementation of the tool by DrgCode Consulting. Inc. or an approved and c	ertified trainer of	
-	Profile										
1.00	Assessments	Administration VISPDAT 3.0									
	Other Assessments	Administration visitori 3.0									-
	Enrollment and			Assessment							
	Services RHY Assessments		Date	Program	Type						
	SPDAT		9/1/2024	CES Coordinated Access	Entry	Stephanie Hand					
	Assessments			ClientID: 53415							
	Coordinated	Interviewer Name:		Stephanie Hand	(
	Access (Read-Only)	Agency:						Date/Time:	 9/1/2024 12:00:00 AM 		
	CE Assessments	Assessment Level:		Crisis Needs A	kssessmen	t					
0	CE Barriers	Assessment Time Start:		9/1/2024 9:00	MA 00:0			Assessment Time End:	9/1/2024 10:00:00 AM		
	CE COVID-19 Vaccines										
	CE Domestic	Basic Information									
5	Violence	First Name:				Ryan					
6	CE Enrolments	Last Name:				Arroyo					
	CE Financial	Nickname:									
	CE Housing Assessment	Race:				Black, African A	rrican. or African. Hispanic/Latina/e/o				
	Disposition at Exit	Soc Sec No:				621-33-6633					
	CE Release of	Birthdate:				05/15/1991					
	Information	Gender:									
0	CE Self Sufficiency					Man (Boy, if chill					
	Matrix	Identifies as LGBTQ2+?				Yes					
(CE VI-SPDAT	In what language do you feel best able to express yourself?								1	
1	CE TAY-VI- SPDAT	Age at Assessment:				33					1
	CE Universal	Previous SPDAT completed on:				9/1/2024 12:00:	AM				
	Data	VI-SPDAT Previous Score:				11					
0		$P_{\rm const}$, $P_{\rm constant}$,								C. Car	Incel .
										Car	

CE Universal Data

This screen allows the user to view all Universal Data Assessments for clients.

)r		Clients / Univer	sal Data Assessments							🥦 4 🖱 🖝
-	Q Find Client	Ryan Arroyo 5/15/1991 Ma	an (Boy, if child) ClientID 53415	4 m 13						
?	Client Dashboard		ta Assessments							< 0
æ	Day Center Entry	oniversal ba	a Assessments							
		Below is a list o	Below is a list of the client's history of universal data elements. To create a new record, click Add New Universal Data Assessment. To est an existing record, click Edd. Please note that in most cases you will want to add new or edit using the HMS workflows.							
	> 🚊 Profile					3 results found.				
٠	> Common Assessments		Date 11	Program Name	Assessment Type		Housing Status	Prior Residence	Length of Stay	
\$	> 🗅 Other Assessments	۹	10/01/2024	CES Coordinated Access	Exit					
	Enrollment and Services	۹	09/15/2024	CES Coordinated Access	During Program Enrollment/Update					
	> C RHY Assessments	٩	09/01/2024	CES Coordinated Access	Entry			Place not meant for habitation	One year or longer	
	> 🗅 SPDAT Assessments	1								
	Coordinated Access (Read-Only)									
	C CE									
	Assessments									
	CE Barriers	· ·	View the	details of the						
	CE COVID-19 Vaccines									
	CE Domestic Violence		assessme	nt here						
	CE Enrollments									
	CE Financial									
	CE Housing Assessment									
	Disposition at Exit									
	CE Release of Information									
	CE Self Sufficiency Matrix									
	CE VI-SPDAT									
	CE TAY-VI- SPDAT									
	CE Universal Data									
0										Cancel

	Clients. / Universal Data Assessments. / Universal Data Assessment								- 15-	0
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13 Intake	Universal Data Assessment								* 0	ð (
Day Center Entry										
> Profile	Complete the information below related to the selected client's housing status and other relevant inform break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or miss			e data entry as described in the l	Data Dict	ionary, the Default Last Asses	ssment button will not bring in any 3.917 data. Chan	ing any project setup data with existing enrol	ments may af	fect or
> Common				Assessment:						
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C1 CE	Health Insurance									
Assessments	Please indicate whether or not the client is covered by health insurance. If so, you will be able to record I	health insurance sou	rces for the client.							
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If the client is not enrolled in the CES Coordinated Access Project, you will not see any assessments listed in this section.

Logged into the Wrong Agency for CES Coordinated Access

Example: Logged in as Organization: Salvation Army.

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

Status	Service		Provider	0		Date 11		i.	ncoming		(in mi.)	_Modesto User Training Click to change :	
ennifer Frye's Inform	ation												
TANISLA	US TEST												
		Name Gender	Frye, Jennifer Weman (Girl, If child)		Birth	Date 4/12/1992							Age
		Cilent ID:	53062			Race: American Indi	an, Alaska N	lative, or in	digenous				
	Jennifer's Enrollm	ents											۵
						1 result found							
	Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrolliD	Days Enrolled	Exit Destination	Organization	Last Assessed	Prog Type
	✓ Active												
		ihelter - Entry Exi											
	TSA ACES	1	Household without Children	01/17/2023			94374	137475	322		Salvation Army ESG	1/17/2023	0

You may still view if a client is enrolled in Coordinated Entry by visiting the <u>CE Enrollments</u> tab.

Example: Logged in as Organization: Continuum of Care

lennifer Frye Worr	han (Girl, if child)	ClientID 57062	4 🗄 🖸									Lynnell Fuller		
STANIS		3300Z										Continuum of Ca _Modesto Users Training		
STANIS	LAUS II	201										Click to change y	our settings	
			Name: Frye, Jennife	r		Birth Date: 4	4/12/1992					,	Age: 31	
			Gender: Woman (Girl,	if child)										
			Client ID: 53062			Race:	American Indian, J	Alaska Native	, or Indigenous					
Jennifer's Enroll	Iments												ľ	
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Enrollment		Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Da	ite II Case ID	EnrollID 1	Days Enrolled	Exit Destination	Organization	Last Assessed	Program	lype
✓ Exited														
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CES Coord	dinated Access	0	Household with Children and Adults	12/10/2022		12/10/2022	93985	136988	0	No exit interview complet	Continuum of Care	12/10/2022	14	
Jennifer's Servio	ces												ľ	

The CES Coordinated Access Enrollment is visible on the Client Dashboard.

Note: If you create a client enrollment in your project under your agency and then in CES under Continuum of Care, you will be able to see both enrollments on the dashboard even if you are logged in under a different agency. This may make it difficult to realize any potential data quality errors. To avoid this, please double check the organization you are under before entering client data and contact HMIS if you realize you entered the incorrect data under the wrong organization.

Scan the Release of Information and VI-SPDAT Into HMIS

You must be logged into HMIS under Organization: Continuum of Care. Start on the Client Dashboard and navigate to the Profile folder on the left-hand side of the page. Select Client Files. Select Add File to add a new document. **Note:** if you are uploading a family VI-SPDAT, upload the document to the head of household only.

x	Q Search	Clents / Clent Files			🕵 А Ш Ф
ت ۲	Continuum of Care _Modesto Users 2020	Ryan Arroya 5/15/1991 Man (Boy, If shild) ClientED 5/3415 A E Client Files			< 8
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	 i) Card Alias History Address History Case Managers Case Notes Case Notes Client Files Current Living 	Select Profile, then Client Files]		Select Add File to upload a new document
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Complete the Document Name, File Type, and upload the file. **Note:** The File Type field will be a drop-down menu that includes Release of Information, VI-SPDAT, or Other. **Note:** You will have to scan the document to save on your desktop. Once it is uploaded, you must delete the document, DO NOT KEEP it on your computer!

	It may be helpful to re	cord the document name with the	date it was	
Ryan Armono 6/15/19991 Man (Box, if child) 53415 A ■ 13 Client File				< 0
To upload a file and attach it to the Client record, please enter the name of the document and click "Browne" Document		Drop-down menu will have pre-populated responses to choose from		

Once you enter all the information, you can preview your file by selecting the PDF to ensure everything is correct. If you chose the incorrect file, select the x to remove the document. Once everything is correct, select Save. **Note:** If you do not select Save, the document will not be saved.

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After selecting Save, the document will show on the Client Files screen. Selecting the Action Button next to the document will allow you to download the file or change the document name. **Note:** You are unable to delete the document. Please reach out to HMIS if you need a document removed.

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