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*

Contents

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 HMIS@stancounty.com 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 HMIS@stancounty.com. 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 HMIS@stancounty.com 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

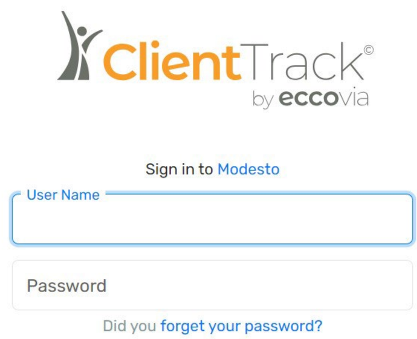
Basic Navigation

HMIS Navigation Icons

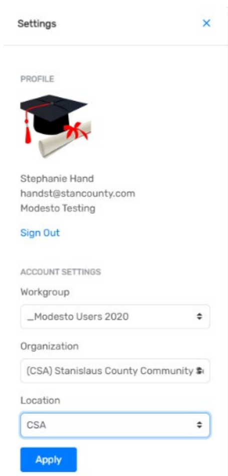
Home	Help	Search Records
Notifications/Alerts	Print	Open Page Help
Client and Coordinated Entry use the same icon	Excel Data Export	Excel Export
Edit	Action Button	User Dashboard
Additional/Audit Information	Intake	Delete
Close Window	Maximize Window	Minimize Window
Issues	Reports	Providers
Expand/Collapse	Minimized Windows	Favorites
Data Explorer	Mandatory Data Field	Choose Date
Pause Workflow	Cancel/Remove	Undo Changes
Toggle Menu	Sign Out	Save (save and stay on the same screen)
Save & Close (save and move to the next screen)		

Log into ClientTrack

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

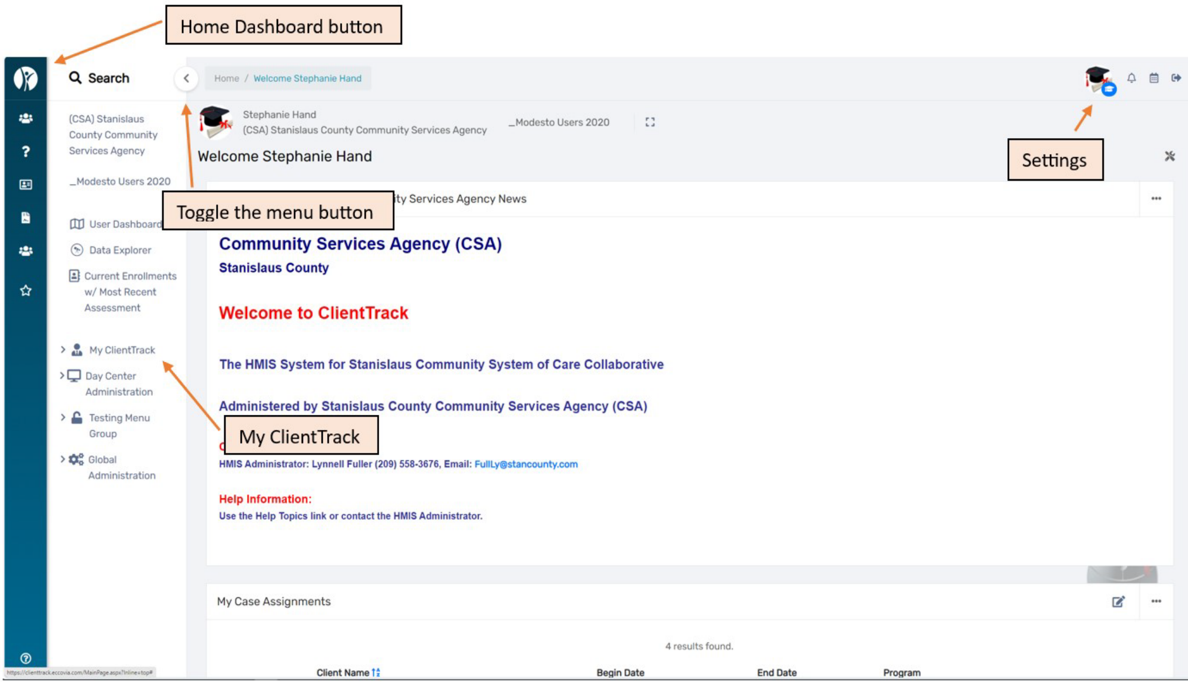


www.clienttrack.eccovia.com/login/modesto



If you have access to more than one organization, navigate to Settings when you first login. The Organization and Workgroup will appear in the Account Settings section. It is critical that you make sure to change to the correct organization prior to entering data on a client.

Home Dashboard



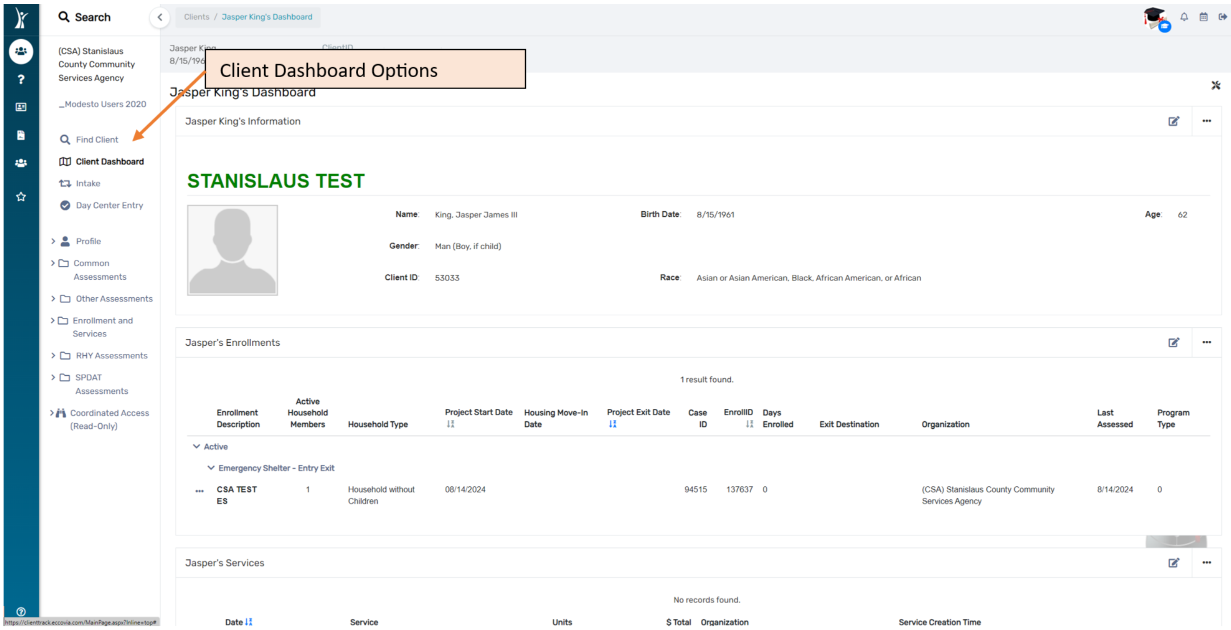
Home Dashboard: This is your "Home Workspace" as a user. Here you can view information specific to you like your user configuration, case assignments and current program enrollments. Select User Dashboard to return to the screen shown above.

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



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.

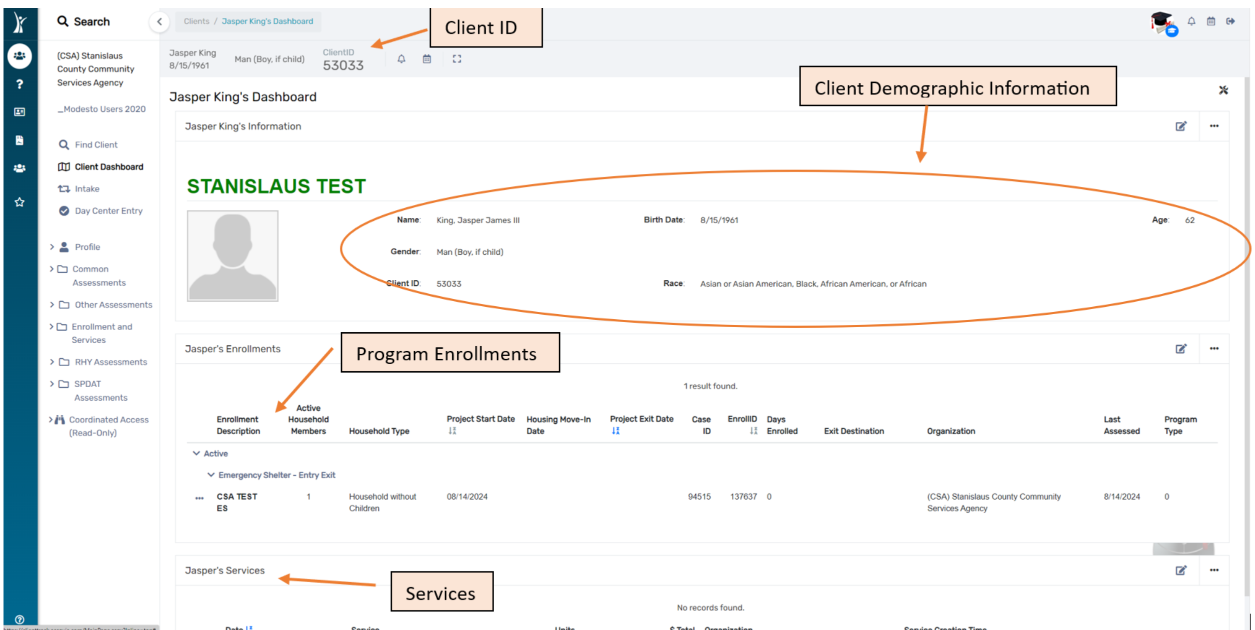
Enrollment and Services: Use this drop-down menu to access Enrollments, Referrals, Services, Quick Services, and more.

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.

Client Dashboard – Client Record



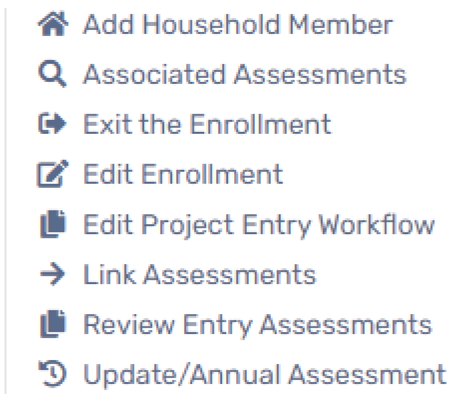
Client ID: ClientTrack's identifer of each client. This number can be used as an identifier instead of using Personally Idenfitable Information such as, Client Name, DOB, Age, Gender, or SSN.

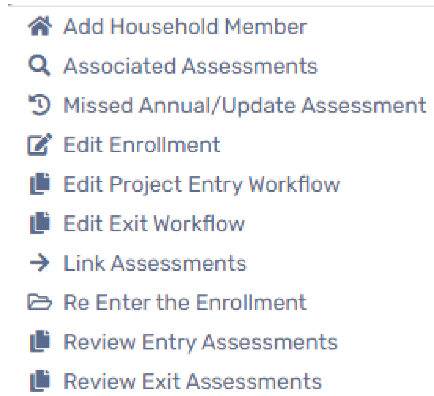
Client Demographic Information: Shows the Client Name, DOB, Age, Gender, Ethnicity, and Race.

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.

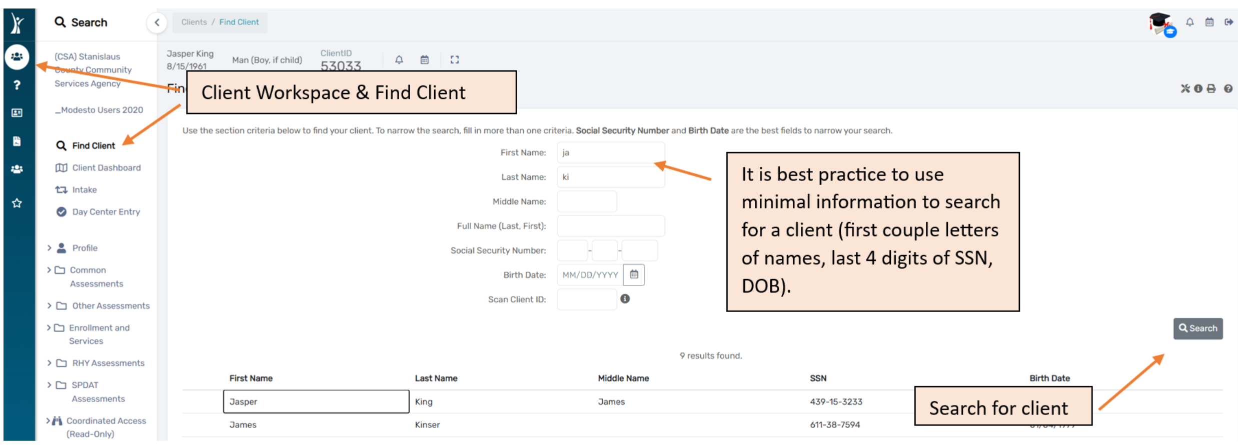
Re-Enter the Enrollment: Use this feature to re-enroll a client who was accidentally exited or for Outreach clients who return prior to 90 days, this option should be used sparingly and is only allowed in certain circumstances. If you utilize this feature, please reach out to HMIS@stancounty.com so we 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

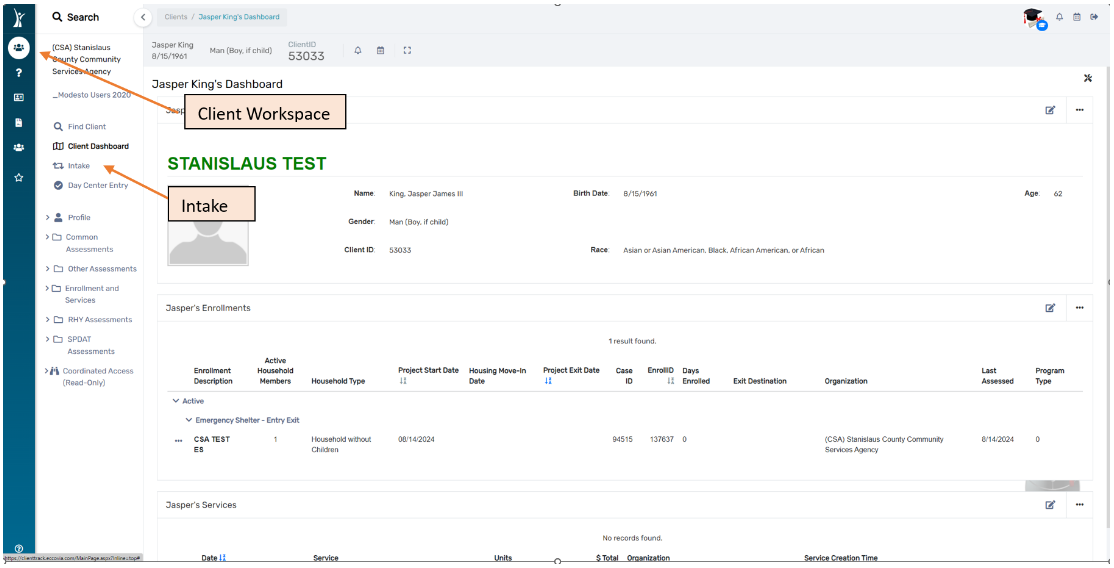


1. Navigate to the Client Workspace.
2. Select Find Client.
3. It is best practice to use minimal information to search for a client (remember "less is best"). Once you enter how you would like to search, select Search. The system will provide you a list of matching names to the information you have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

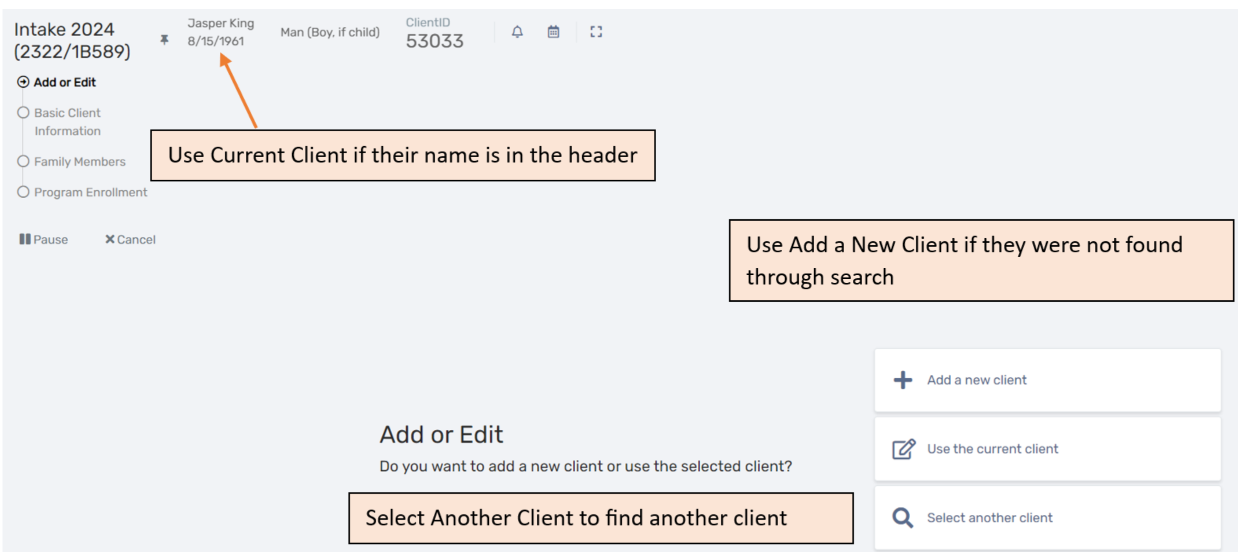
Enter Client Information and Manage Project Enrollments

Start an Intake

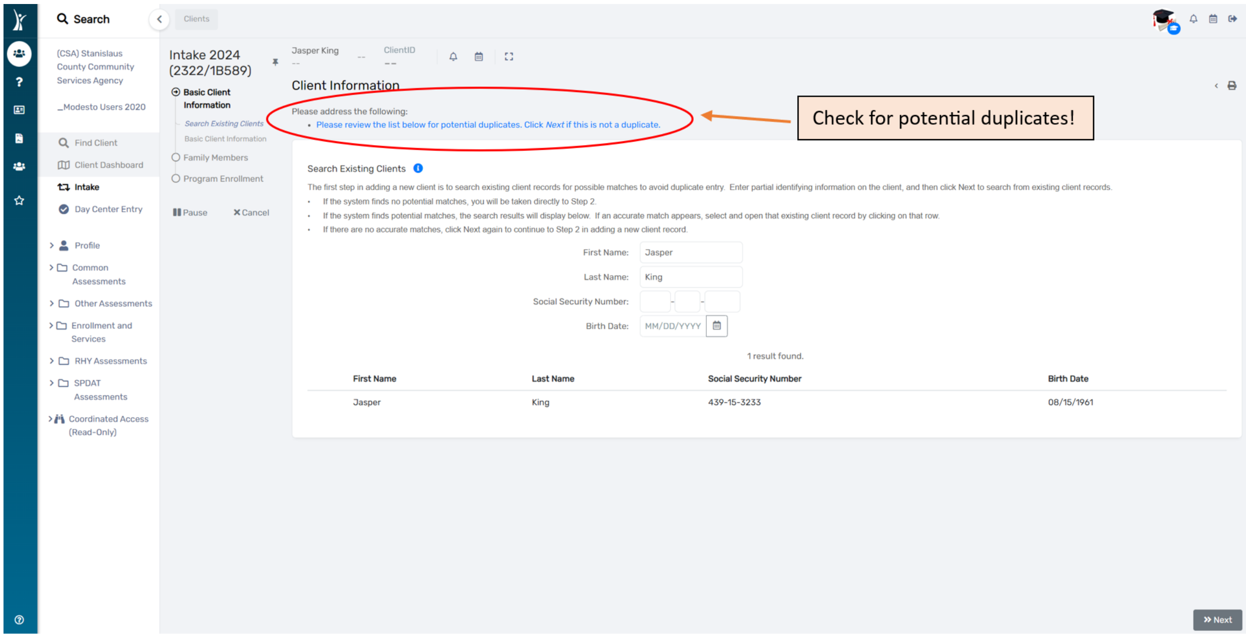
Navigate to the Client Workspace and select Intake.



Select the appropriate option to continue with the Intake.

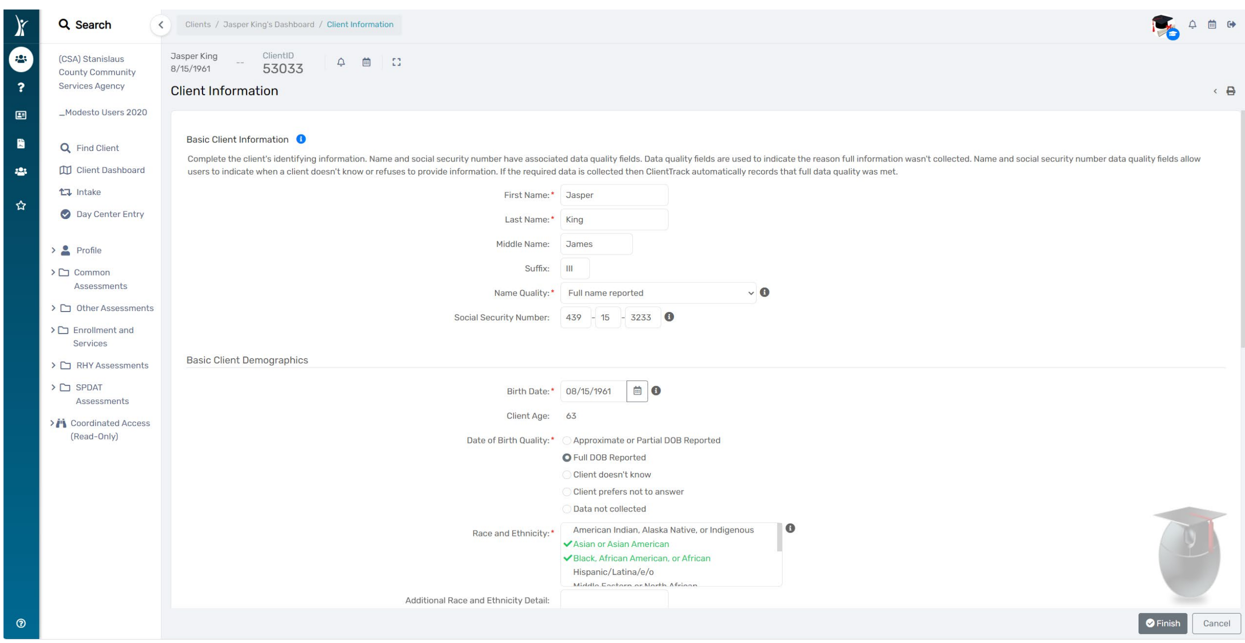


If you select Add a New Client. You will be prompted to enter First Name, Last Name, Social Security Number, and Birthdate. The system will provide an additional warning if it detects any potential duplicates. Verify your client's information does not match an existing client. If the name does not match,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



Workflow To Add a New Client

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



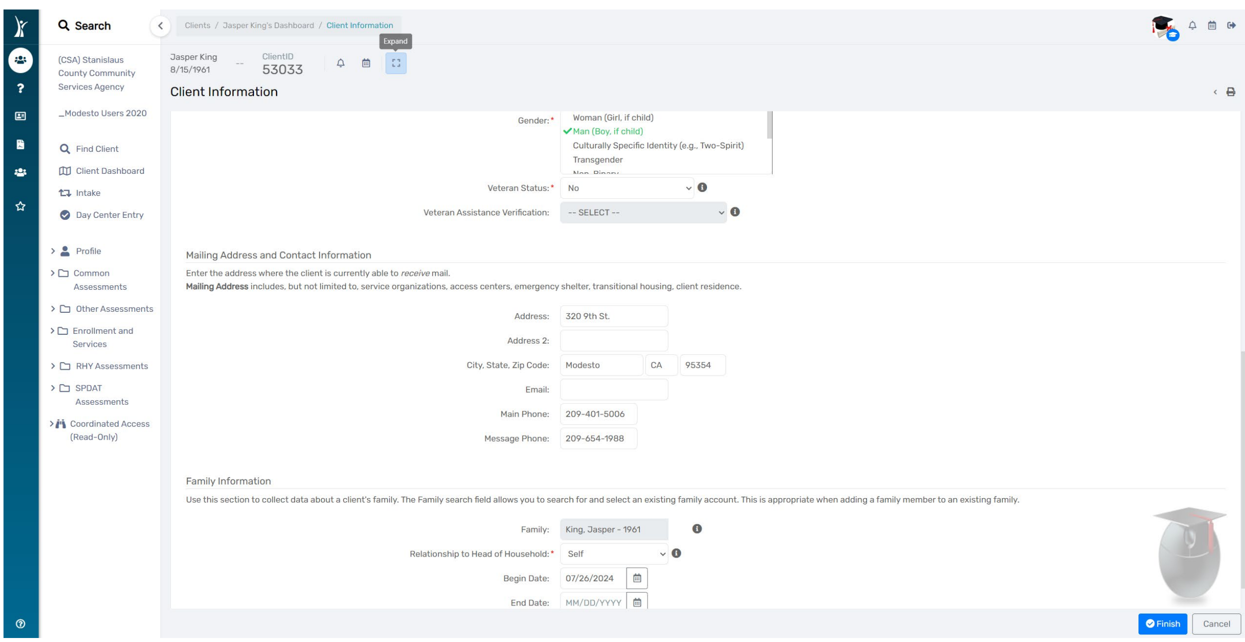
First Name, Middle, and Last Names: Do not add nicknames (this can be recorded in the Alias History section). Use Basic English Grammar; do not use all lower- or upper-case letters. Do not add special characters such as quotes or hyphens because it causes problems when searching the client. Include middle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



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.

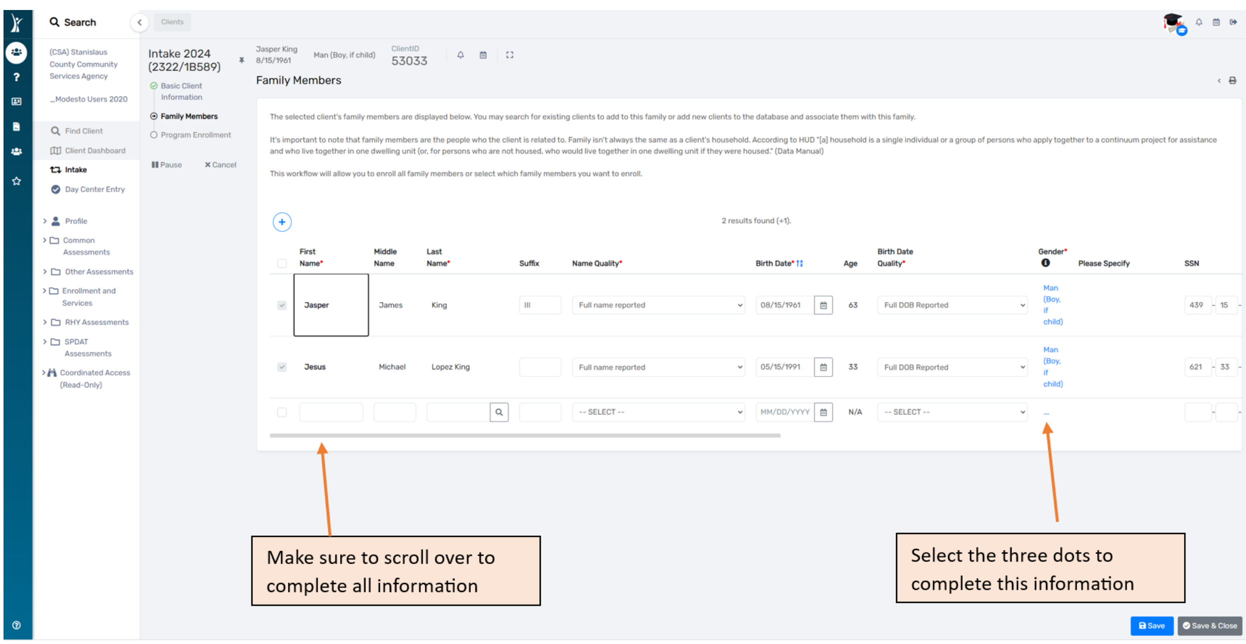
Begin Date: Change to the date that is on the new signed ROI from the client for enrollment.

Add Household Members

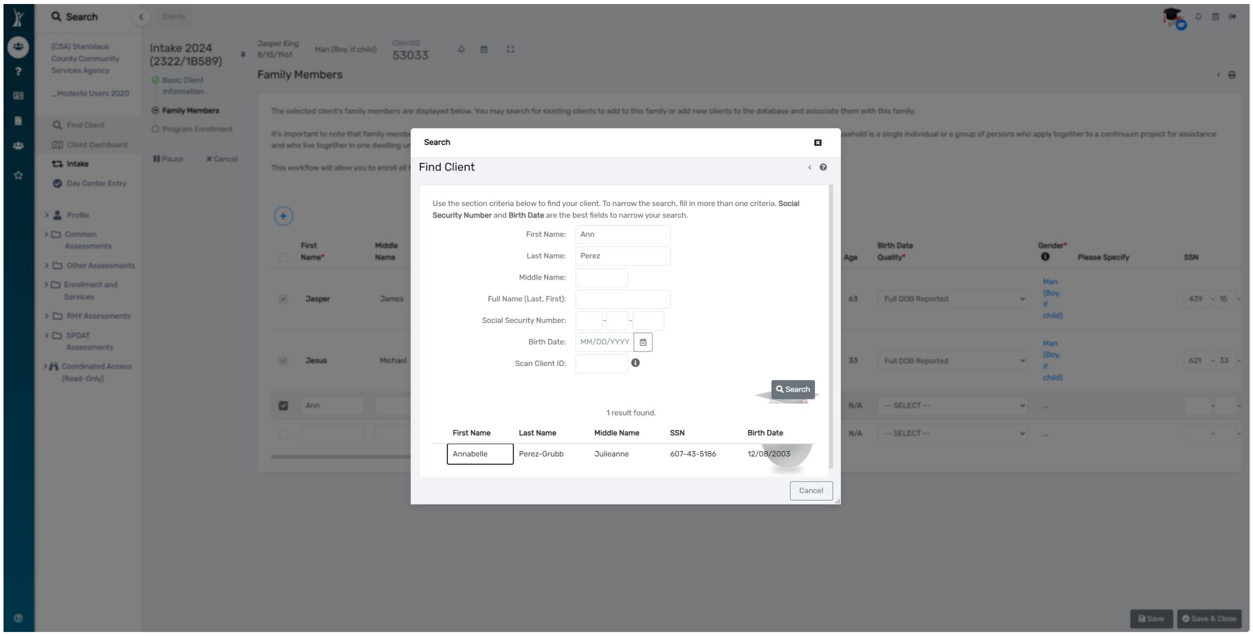
During Enrollment Process

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.

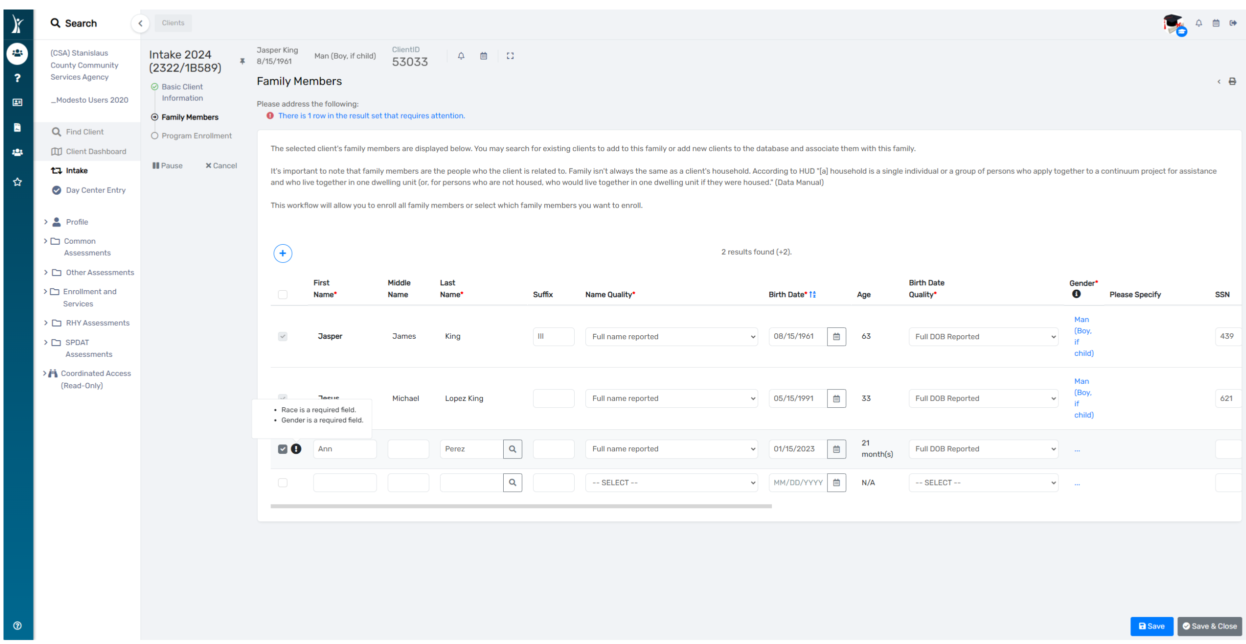
Select the check box next to the empty text boxes under the last listed household member. Insert all relevant information to the new household member. **Note:** Make sure you scroll all the way to the right to add all the information. **Note:** Gender and Race/Ethnicity have three dots to indicate missing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

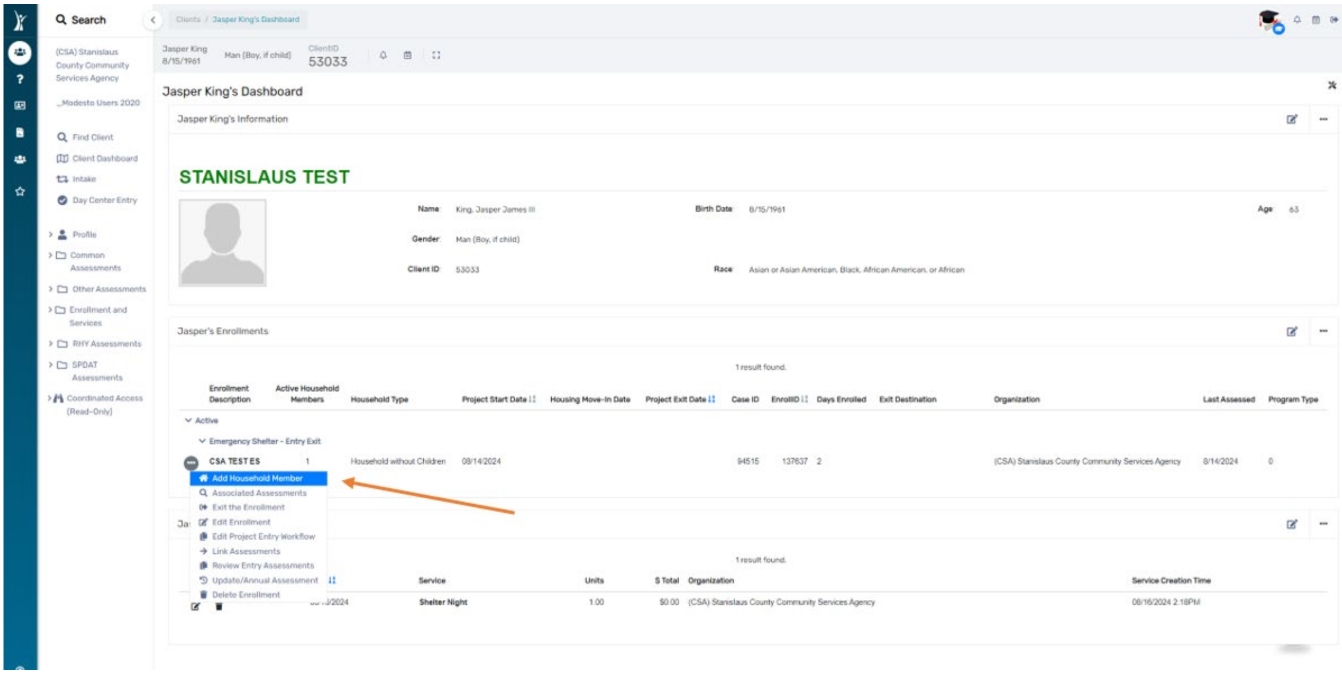


Once all information is completed, select Save & Close. If you receive an error message, you will see an exclamation mark next to the row that requires your attention. Hover over the exclamation mark to view the issue(s).

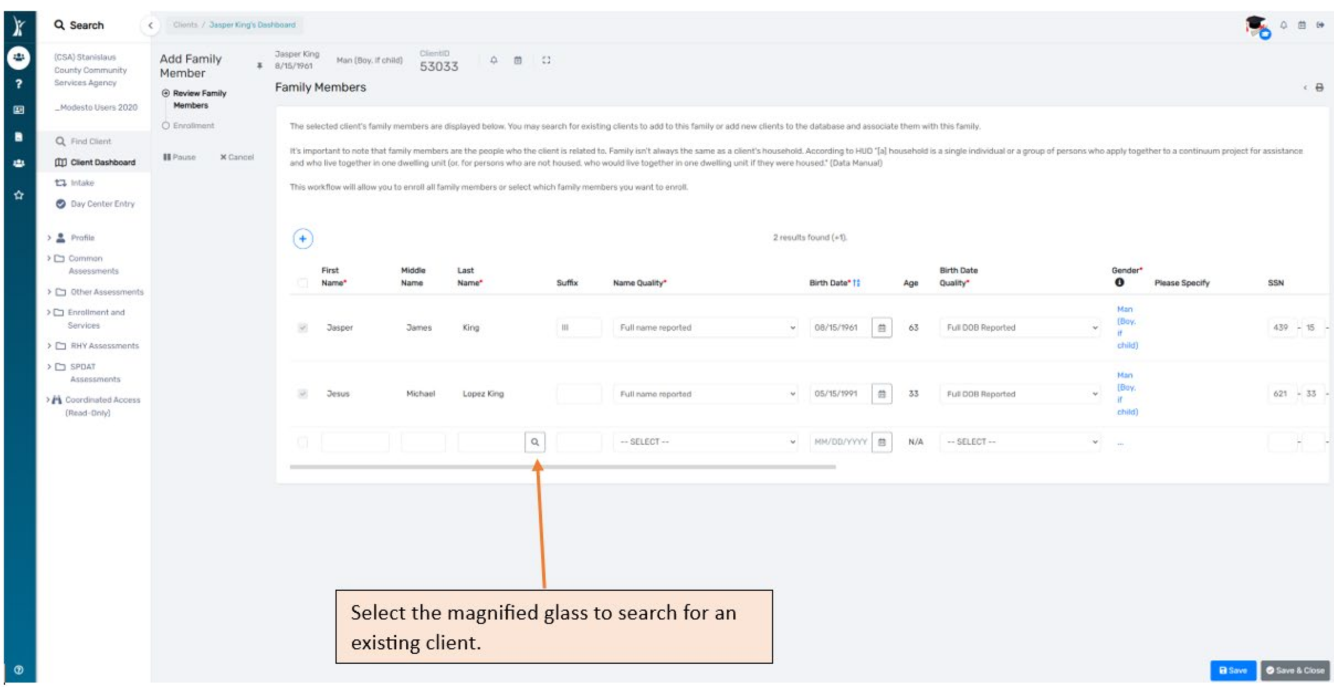


Existing Enrollment

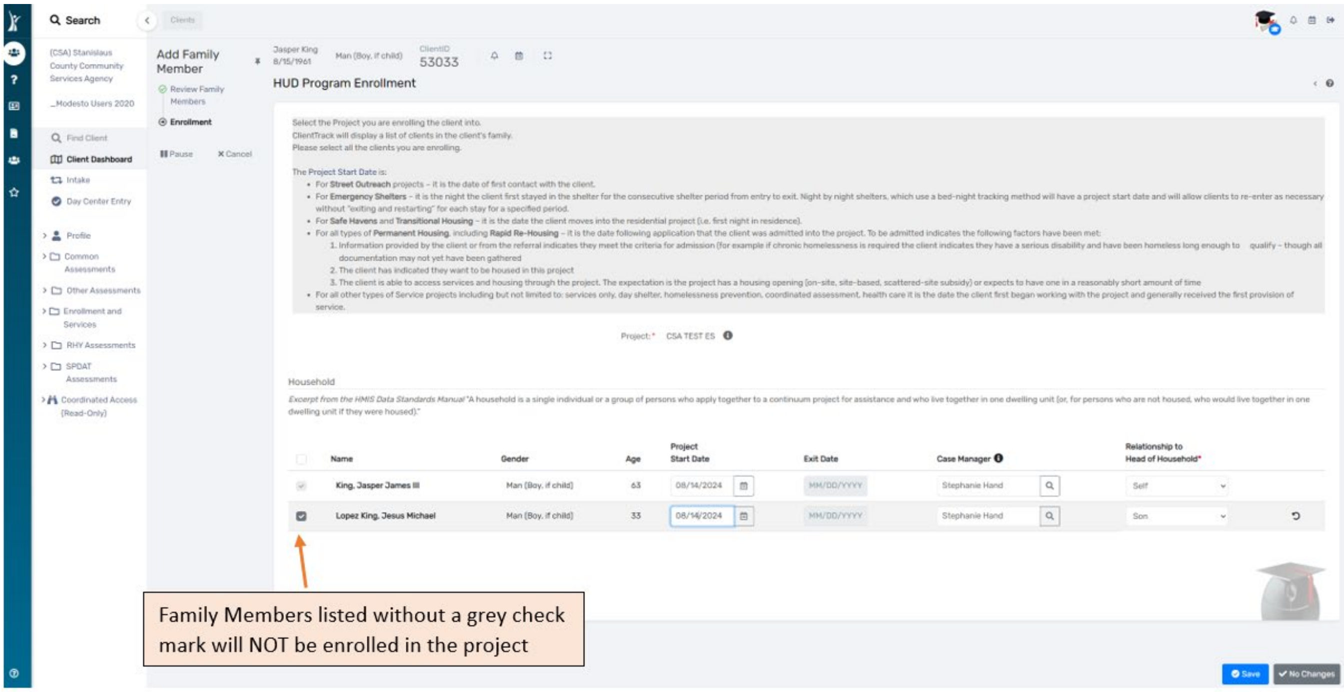
If you need to add a household member to an enrollment, you will begin on the Head of Household's Client Dashboard and select the action button. Select Add Household Member.



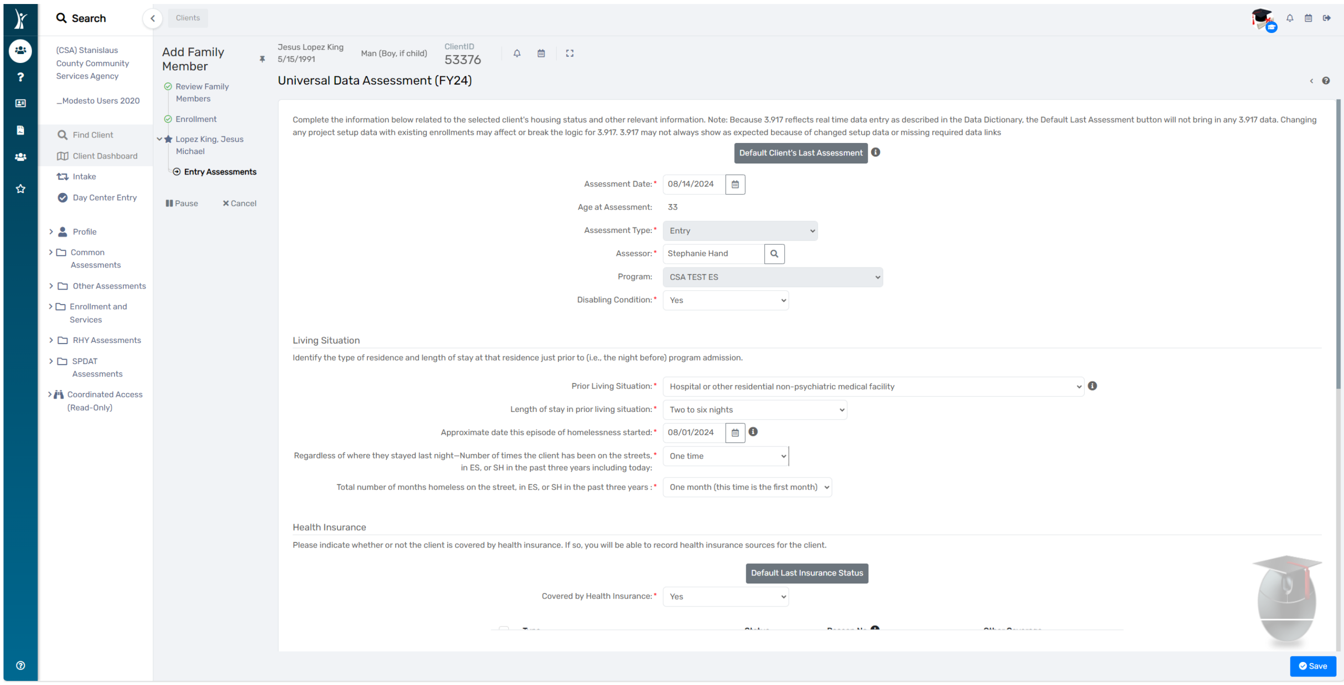
Enter or search for a client to add to the household. Remember to scroll to the right to add a relationship to the head of household.



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



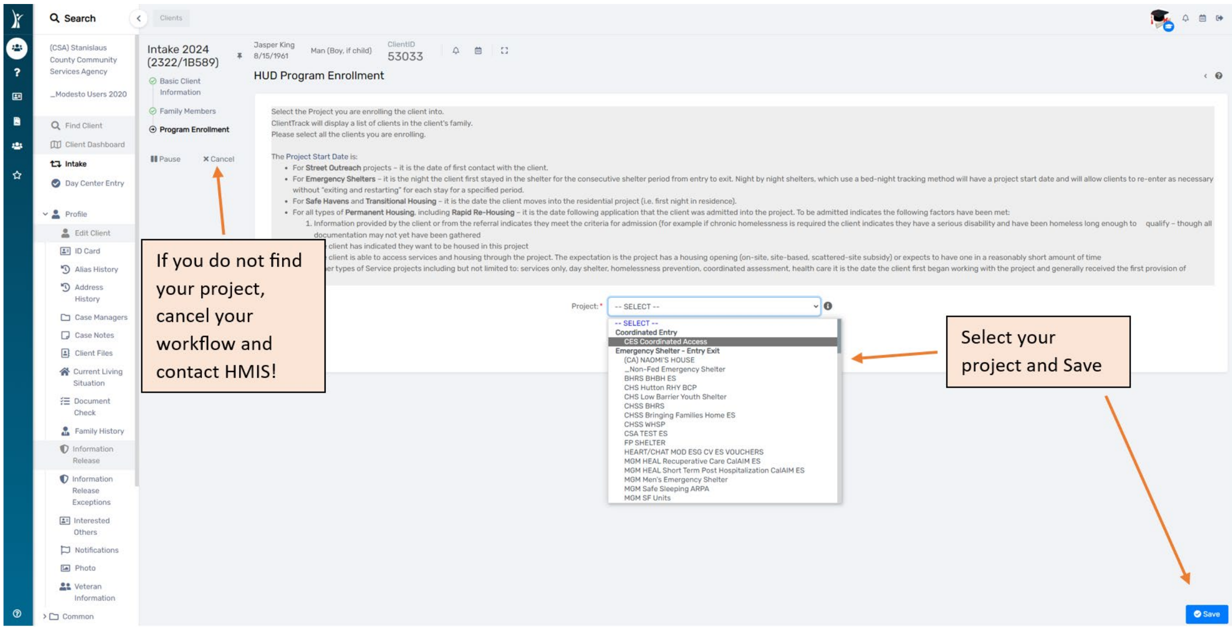
Once you Save, the Entry Project Workflow will appear for the added Household Member. Complete all information to enroll this individual.



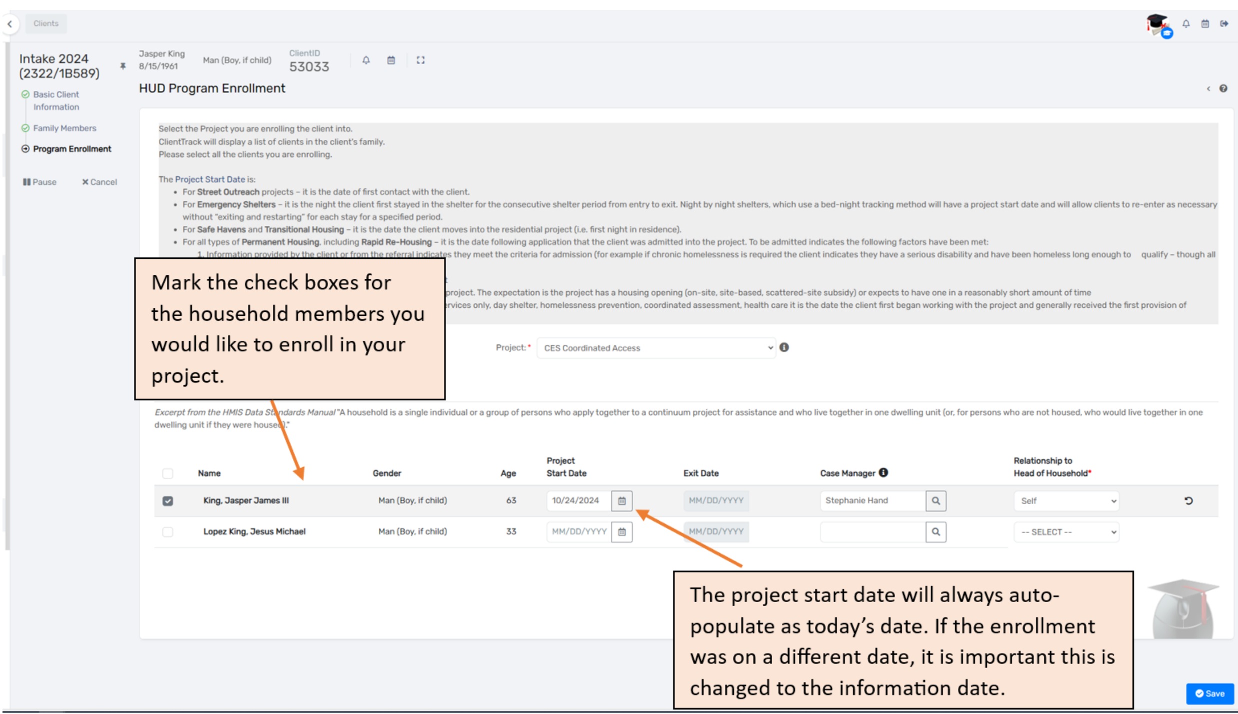
Project Enrollment

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.

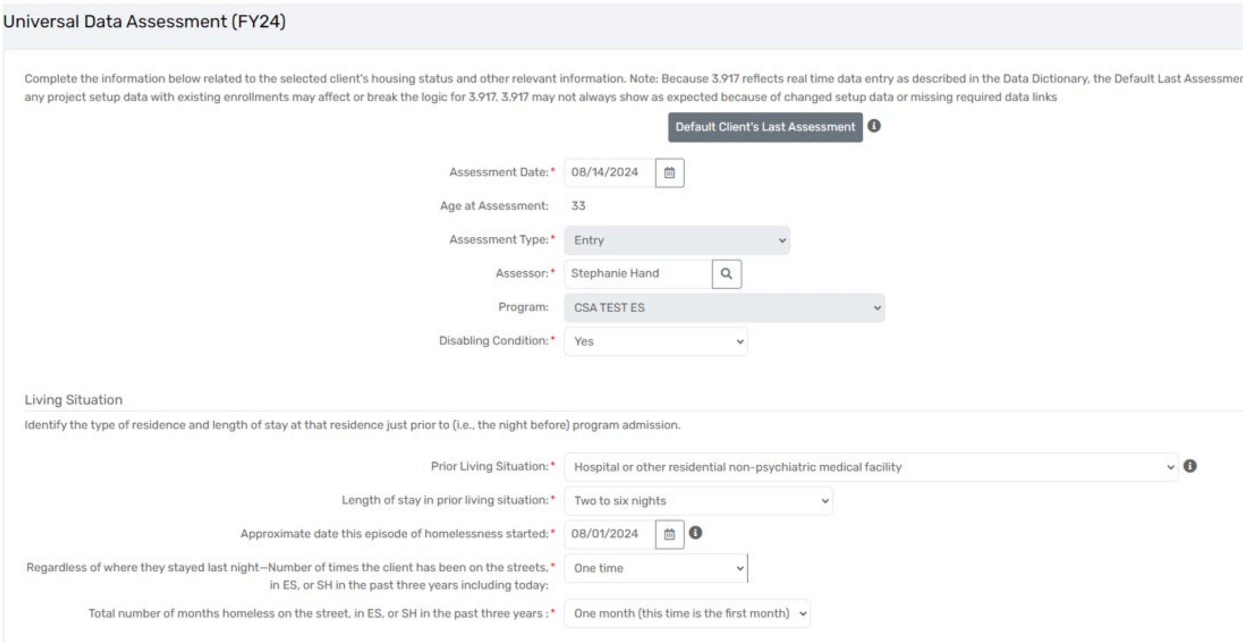


Select the box on the left for each household member you wish to enroll in the project selected on the previous page. **Note:** The Project Start Date will default to the current date. Make sure you change the date if their Project Start Date is not the current date. Select Save when finished.



HMIS Universal Data Assessment

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



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

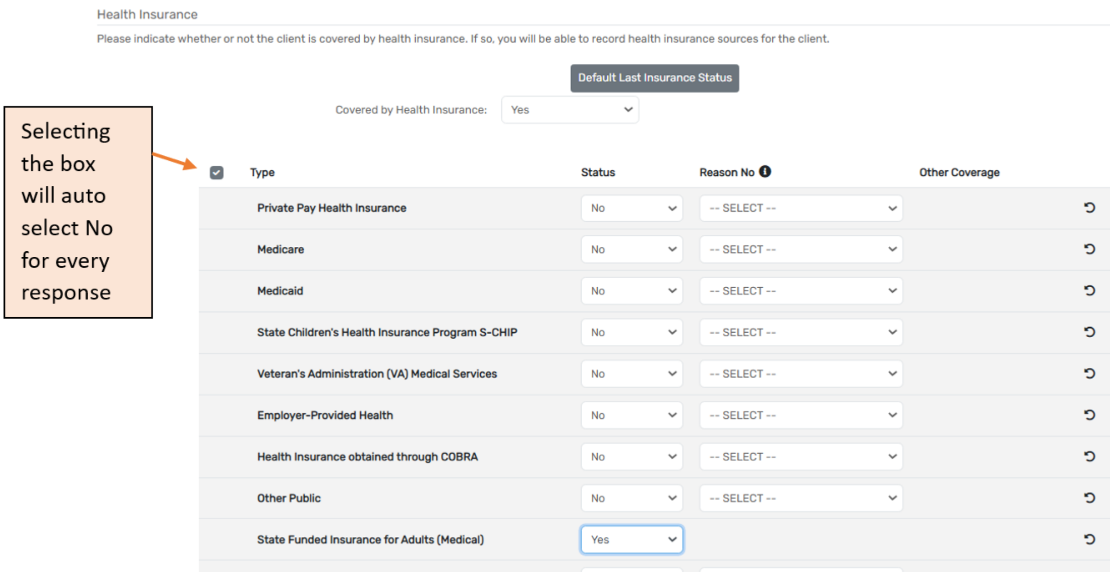
Disabling Condition: There is only one recorded disabling condition per enrollment. The answer should always reflect the most current disabling condition available.

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

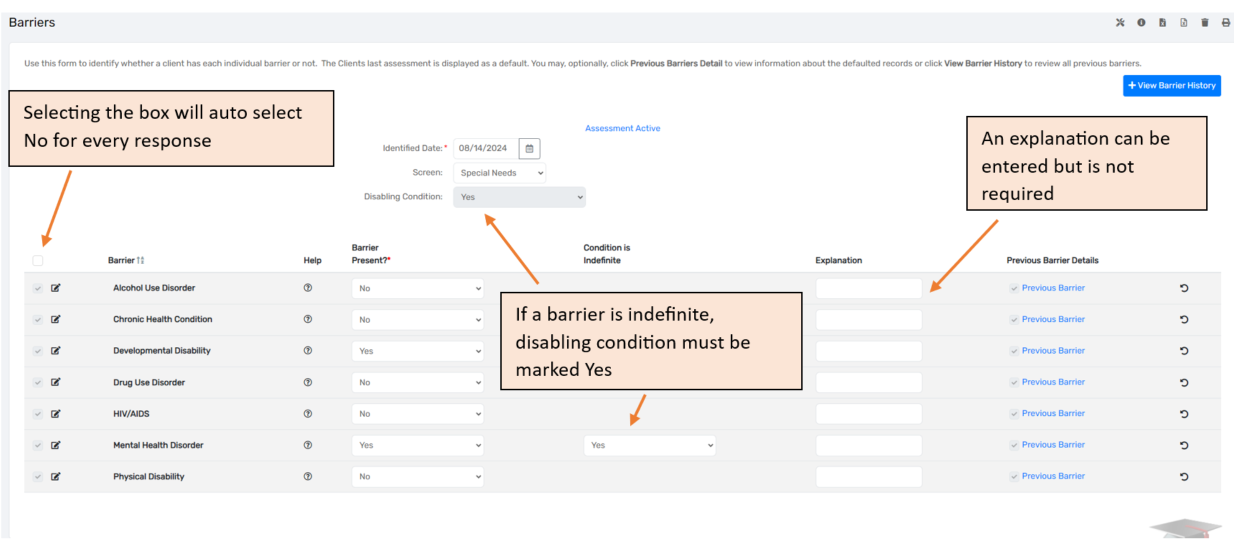
Record the client's health insurance status. **Note:** if you mark Yes to Covered by Health Insurance, you need to have a type of health insurance recorded. More than one health insurance may be selected.



Barriers Assessment

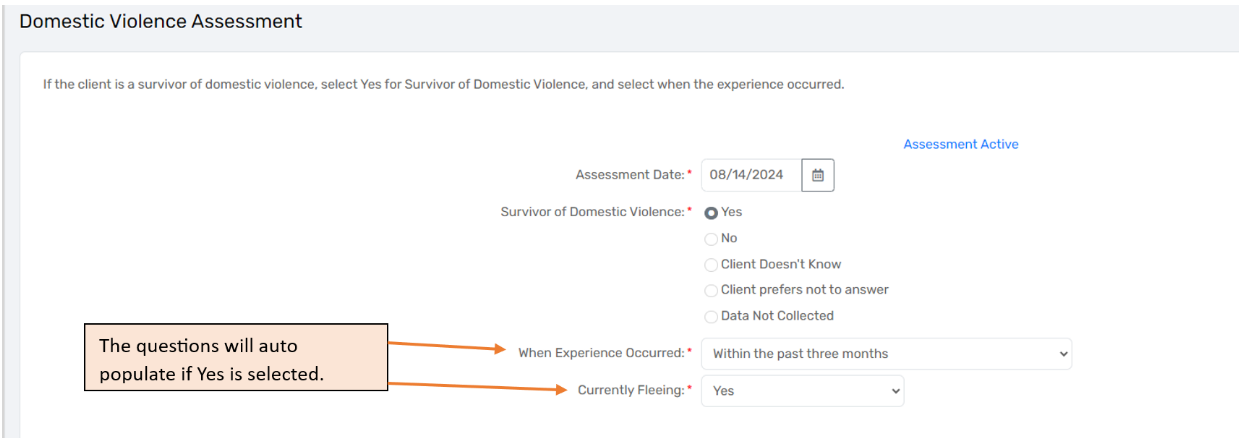
Record each individual barrier for the client. The client's last assessment may be displayed as a default. If the client has recorded barriers, select Yes from the drop-down menu for the recorded barrier. **Note:** For Developmental Disability and HIV/AIDS, there will not be a drop-down for "Condition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



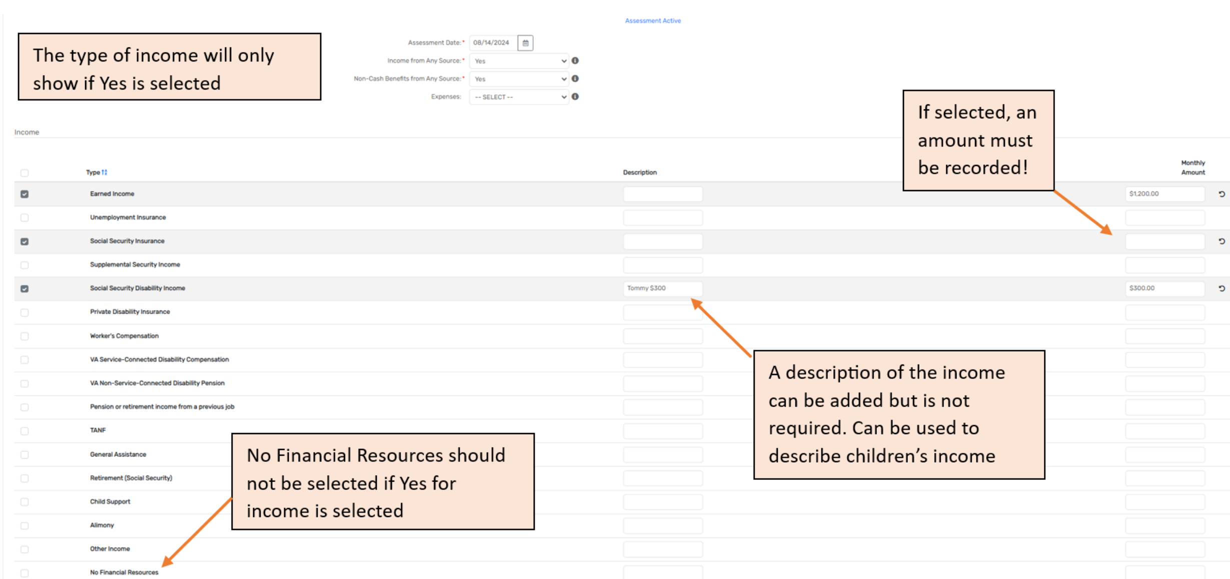
Domestic Violence Assessment

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.



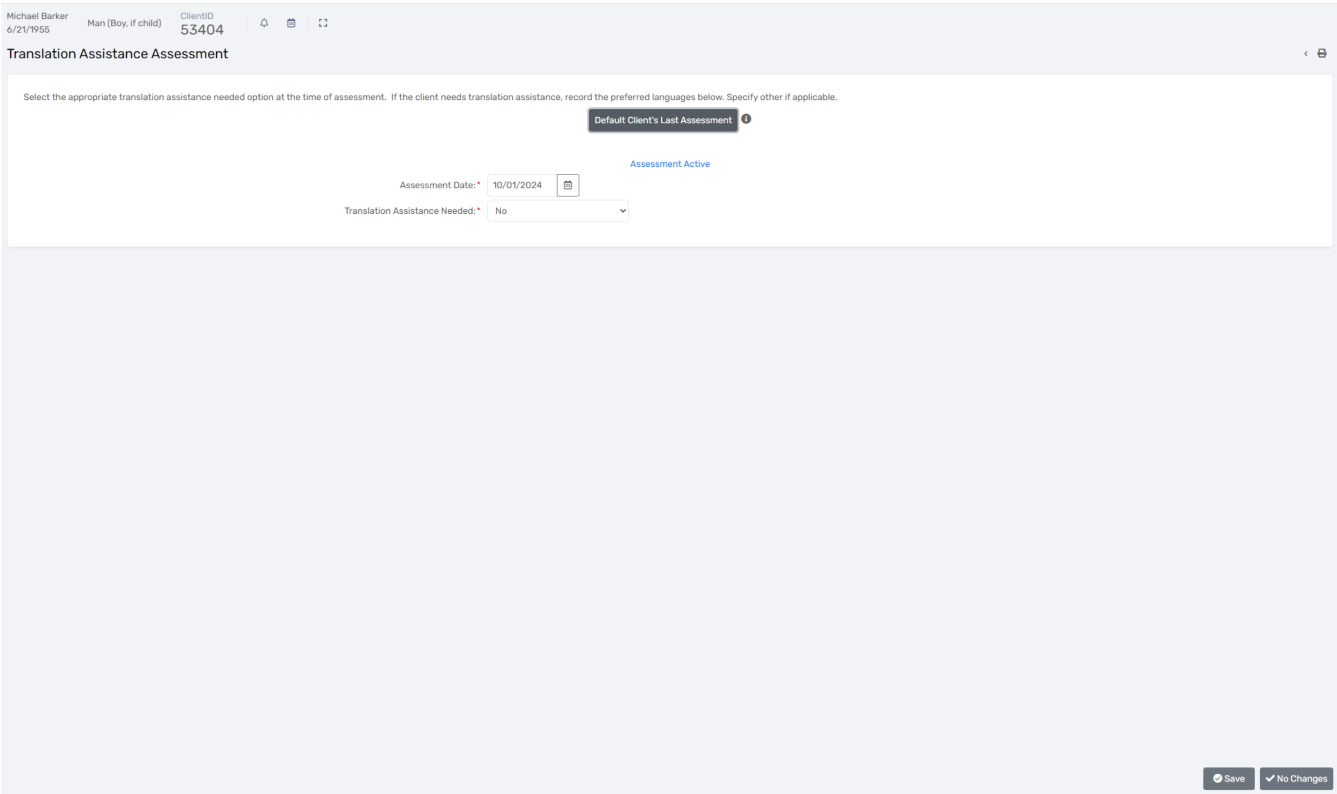
Financial Assessment

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.



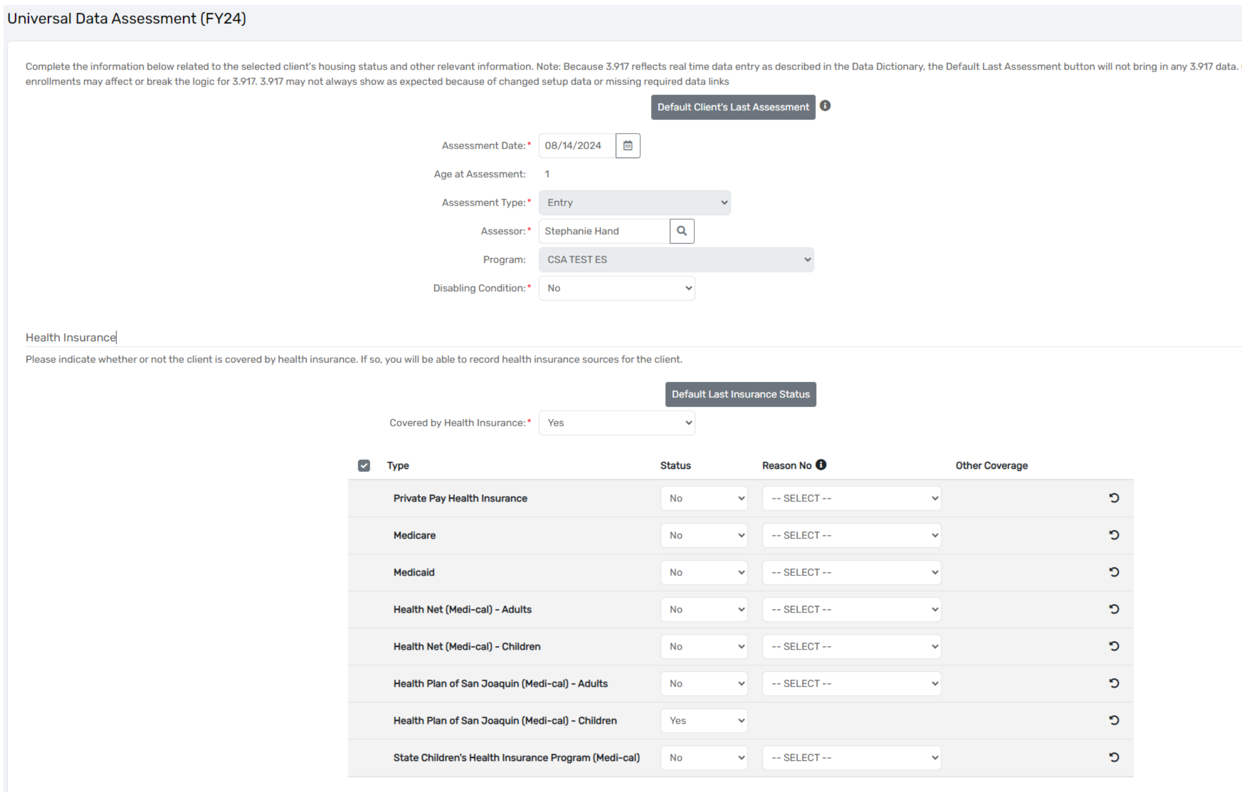
Translation Assistance

Complete the required information.



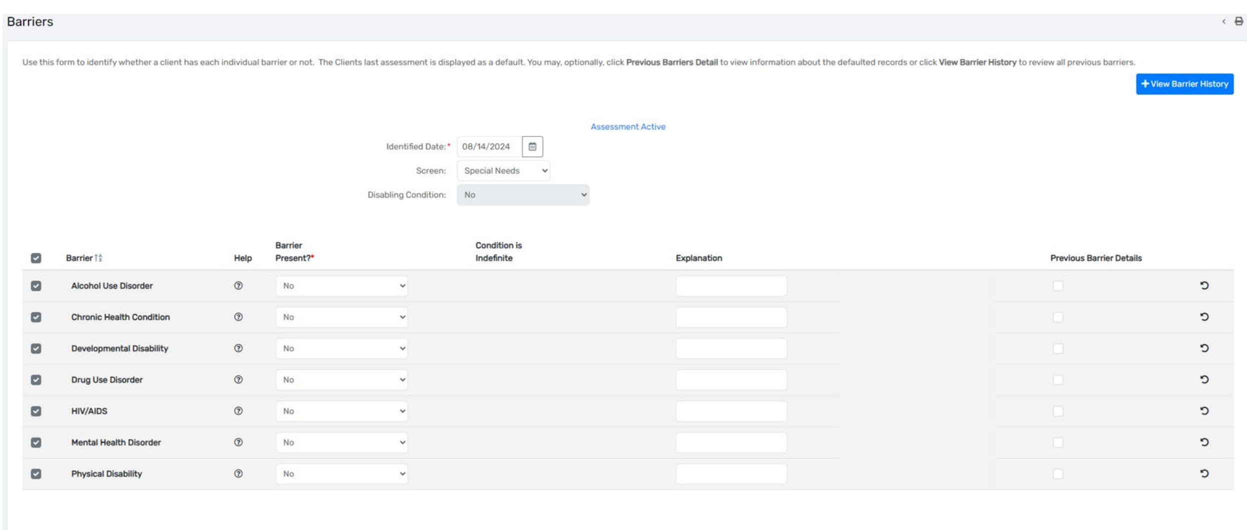
Universal Data Assessment for Child

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.



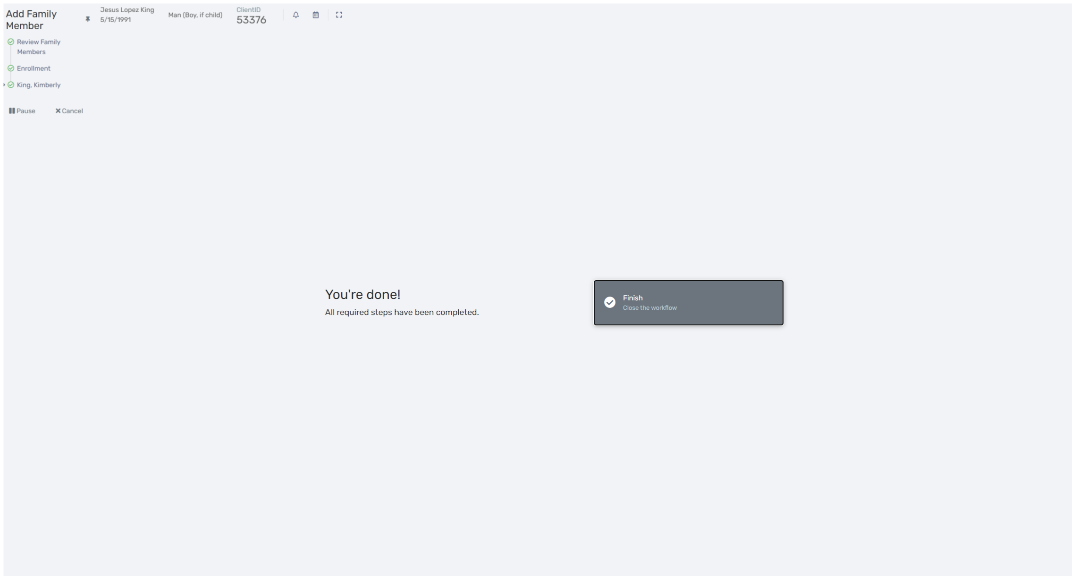
Barriers Assessment for Child

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.

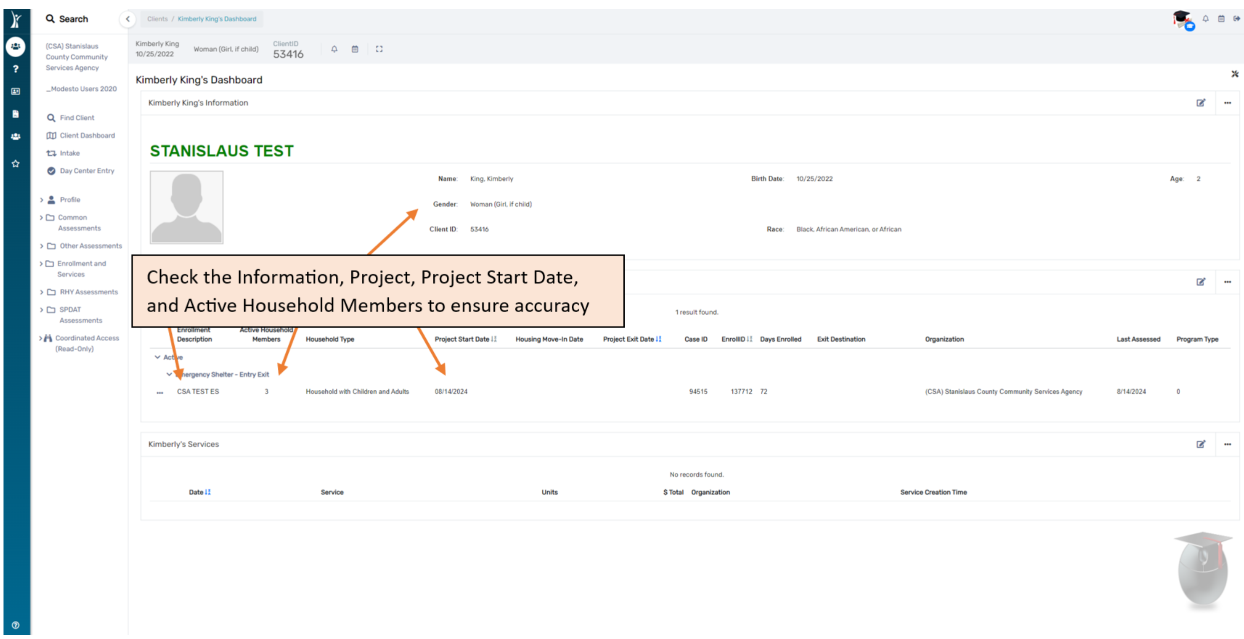


Complete Intake Workflow

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



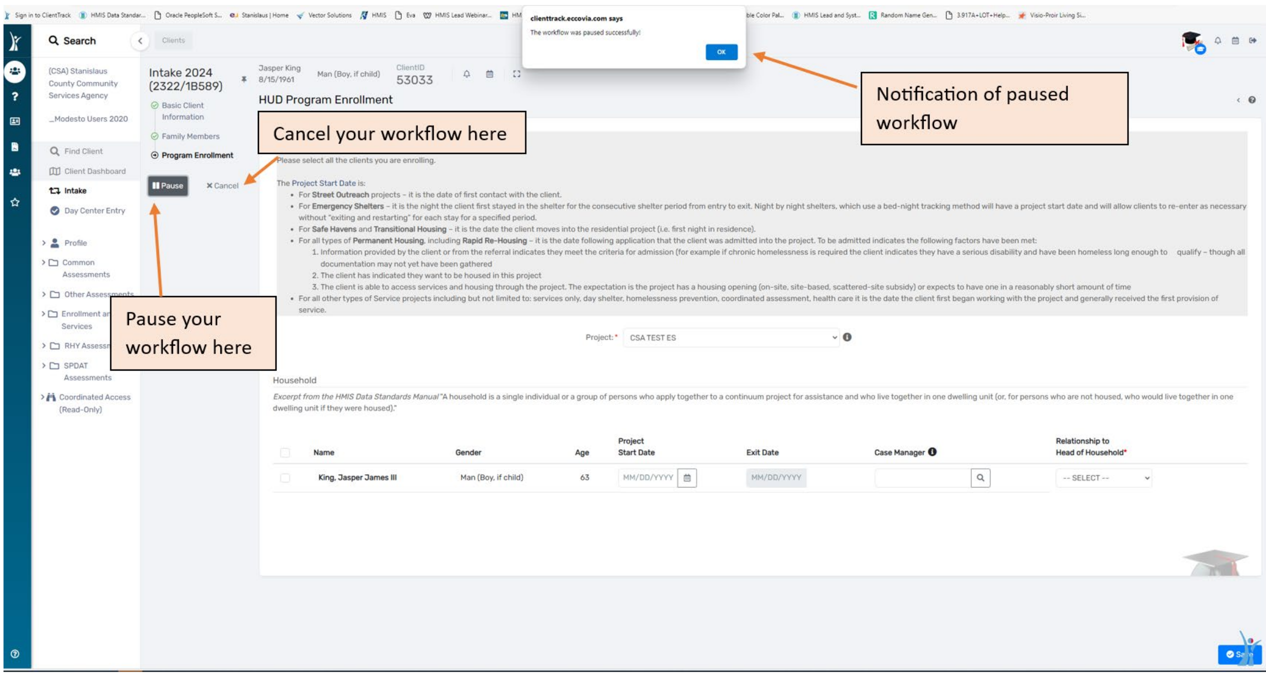
Return to the Client's Dashboard and review the enrollment for accuracy.



YOU HAVE COMPLETED YOUR ENROLLMENT!

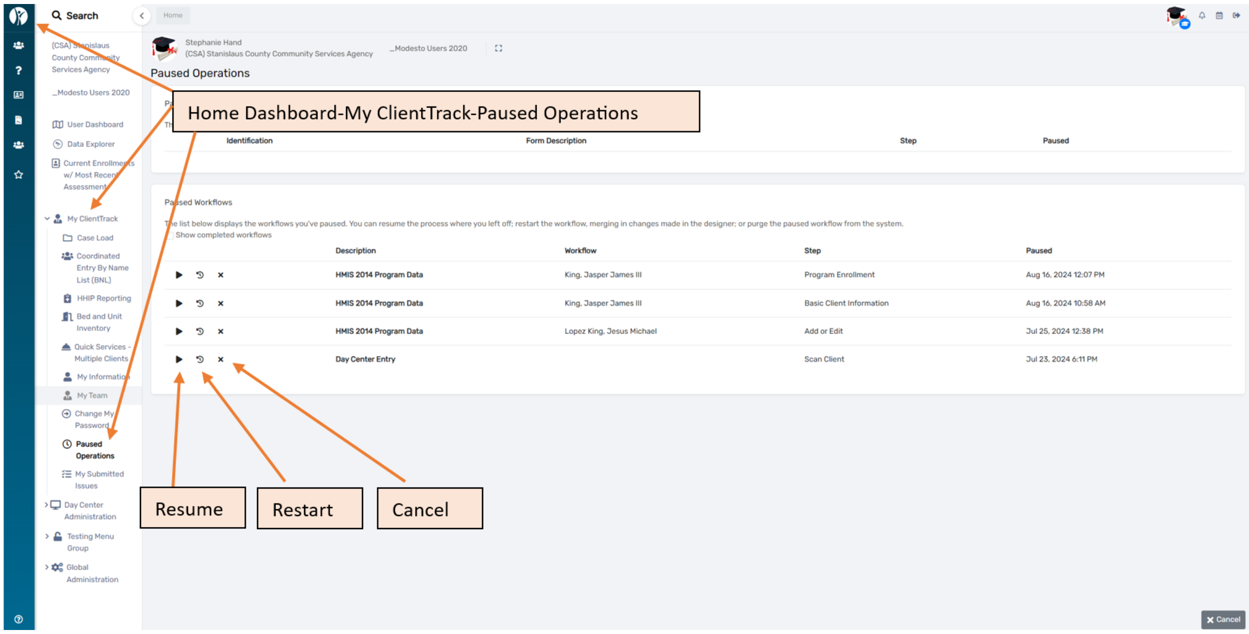
Pause Your Workflow

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.



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

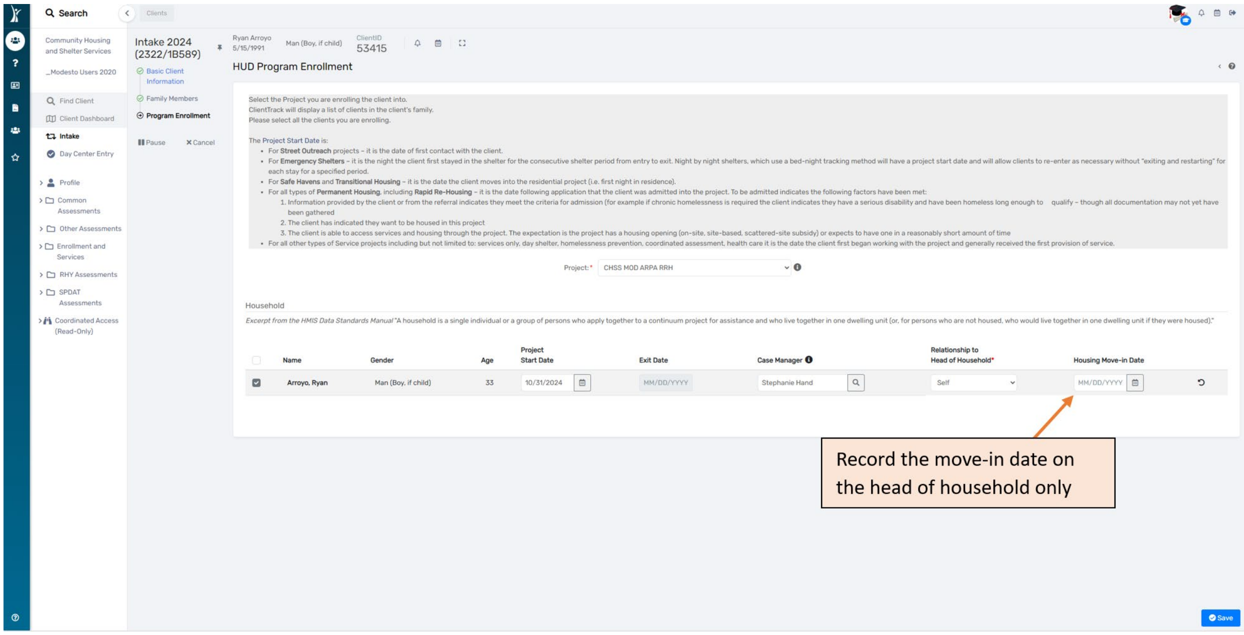
Rapid Re-Housing (RRH), Permanent Supportive Housing (PSH), & Permanent Housing (PH) Enrollment

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.

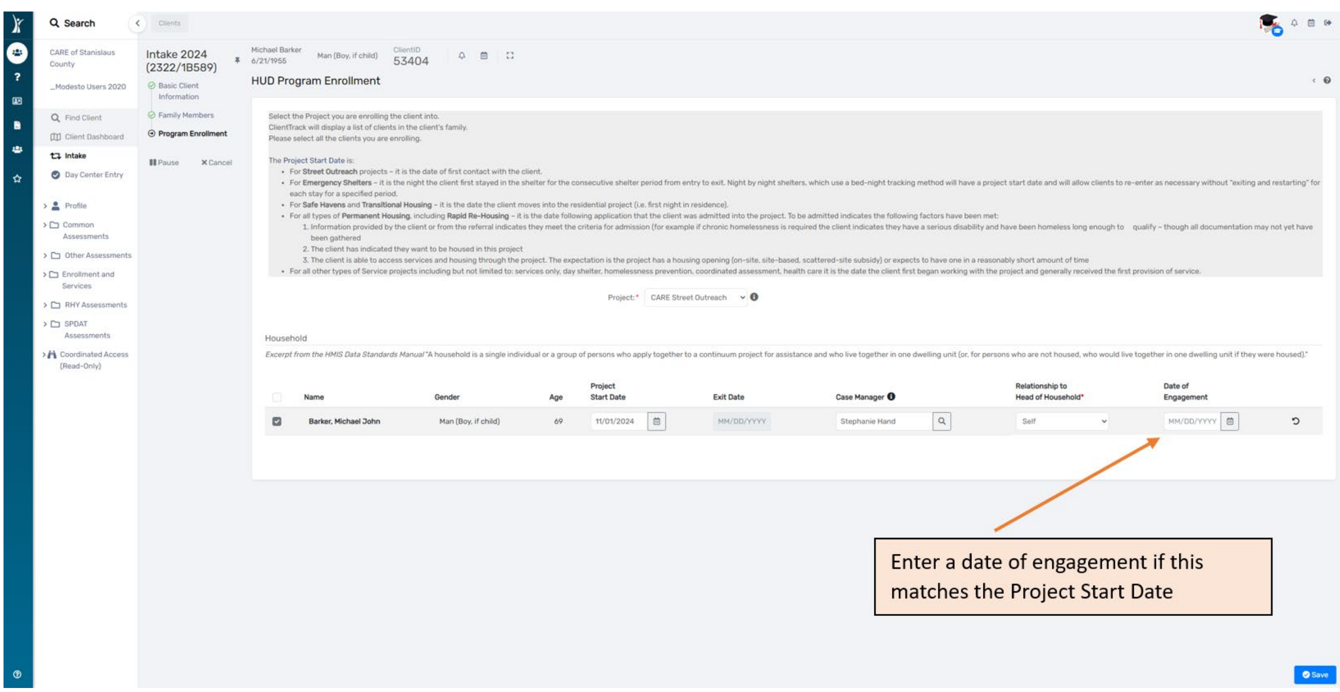
Housing Move-In Date: You should use the date the **client takes occupancy** of the unit (when the individual sleeps in the unit). This is not always the same date the lease is signed. If the date of move-in is after the Project Entry Date, you will complete an Update/Annual Assessment to add the date.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

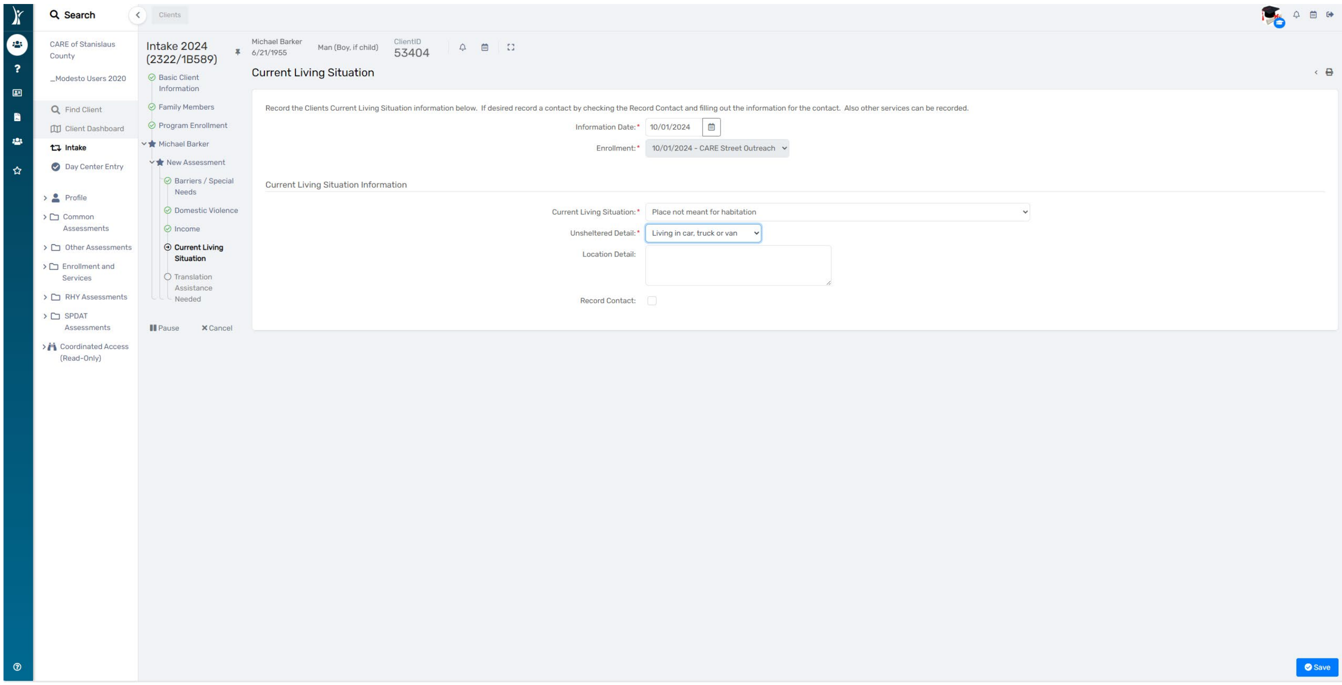


Street Outreach

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.



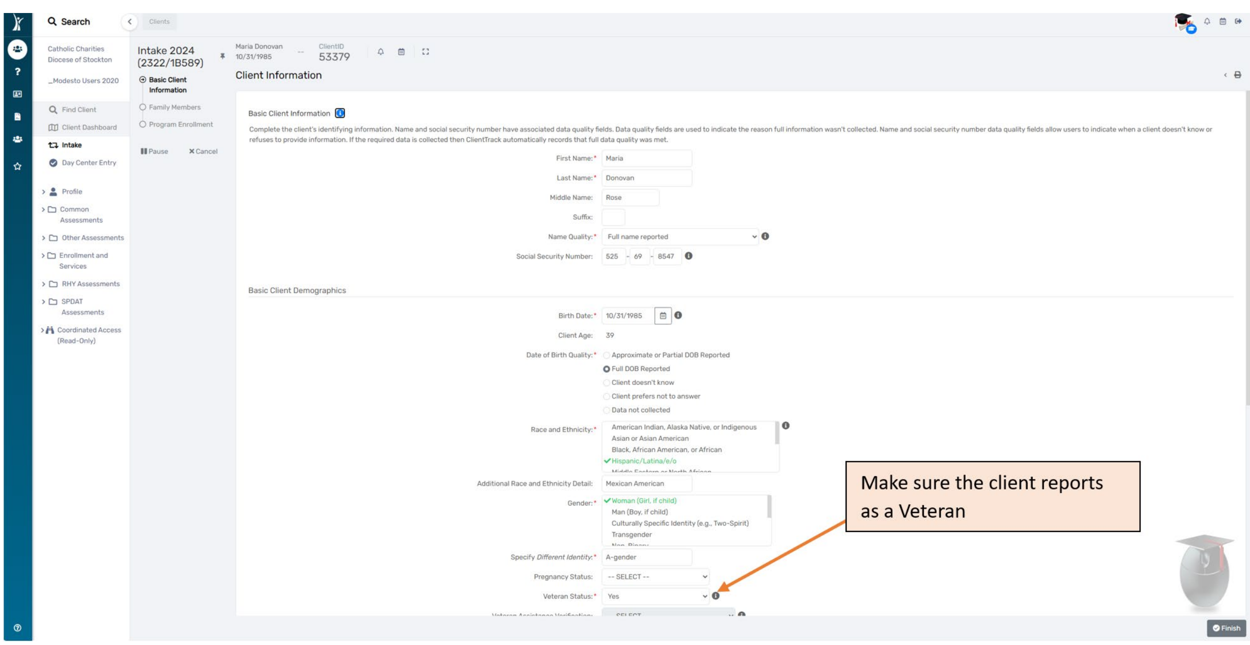
Record their Current Living Situation. This may be different than the Prior Living Situation previously recorded.



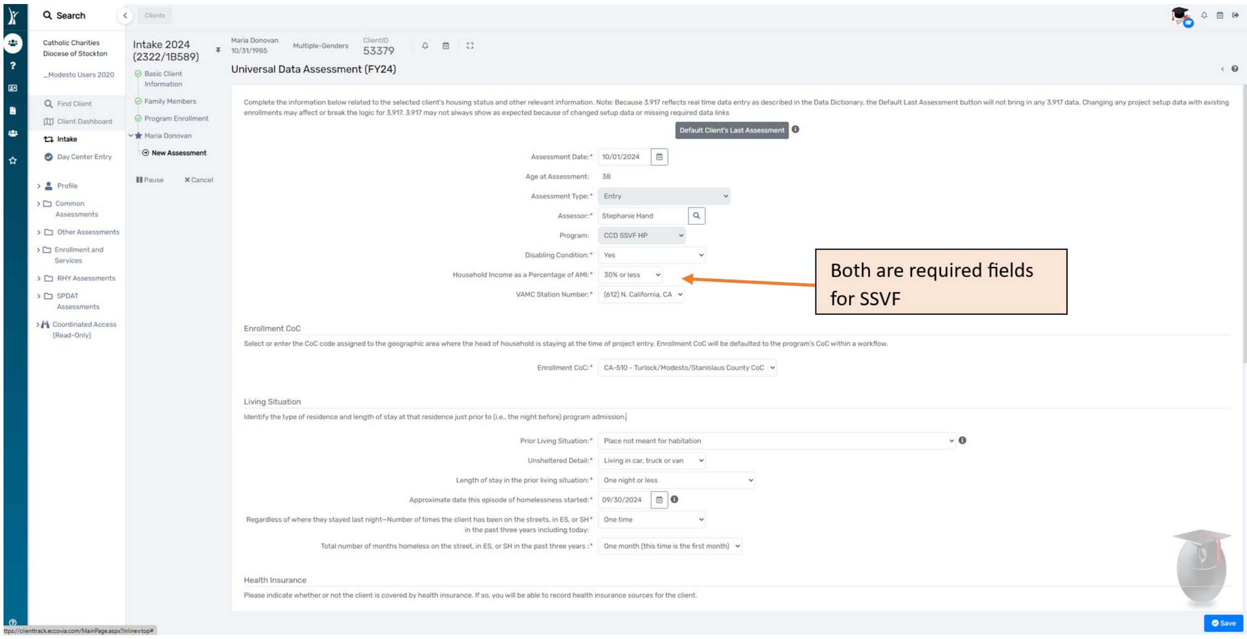
Supportive Services for Veteran Families (SSVF) Enrollment

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.

Basic Information and Universal Data Assessment

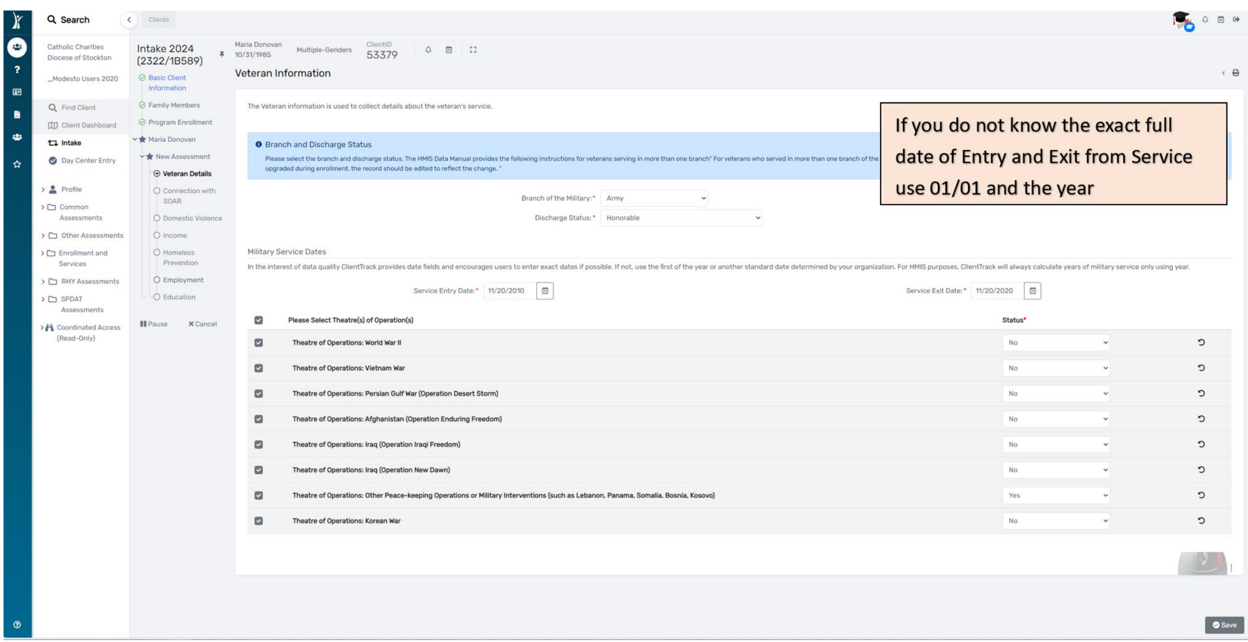


Add Household Income as a Percentage of AMI and VAMC Station Number.

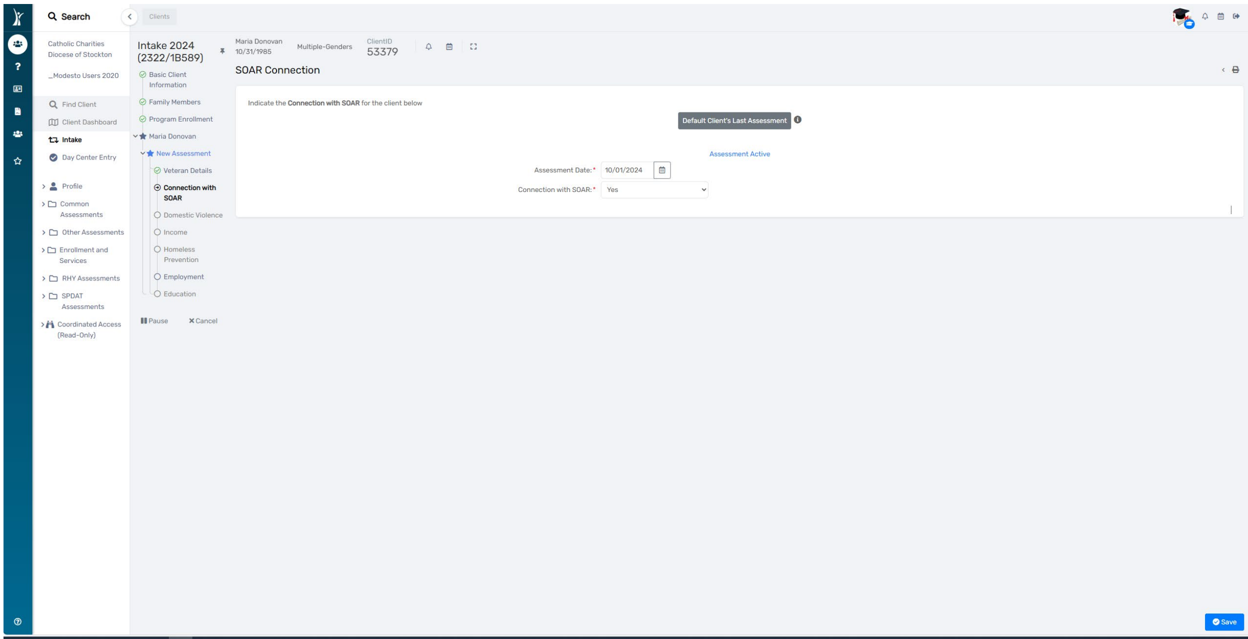


Veteran Information

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.

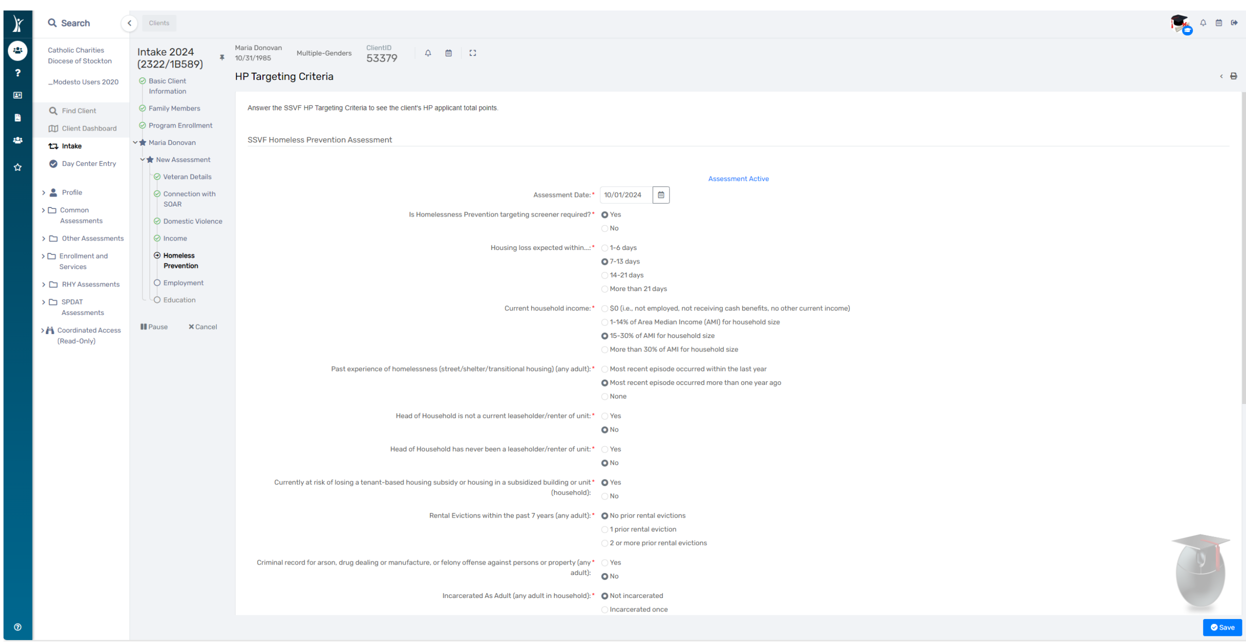


Connection with SOAR



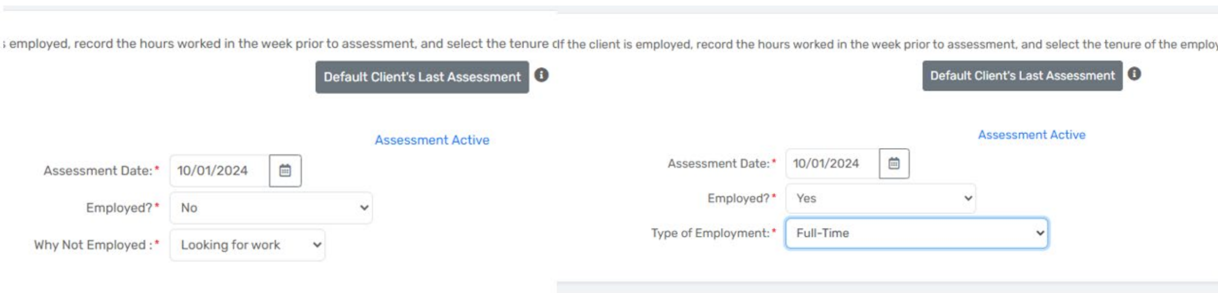
SSVF Homelessness Prevention Assessment

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

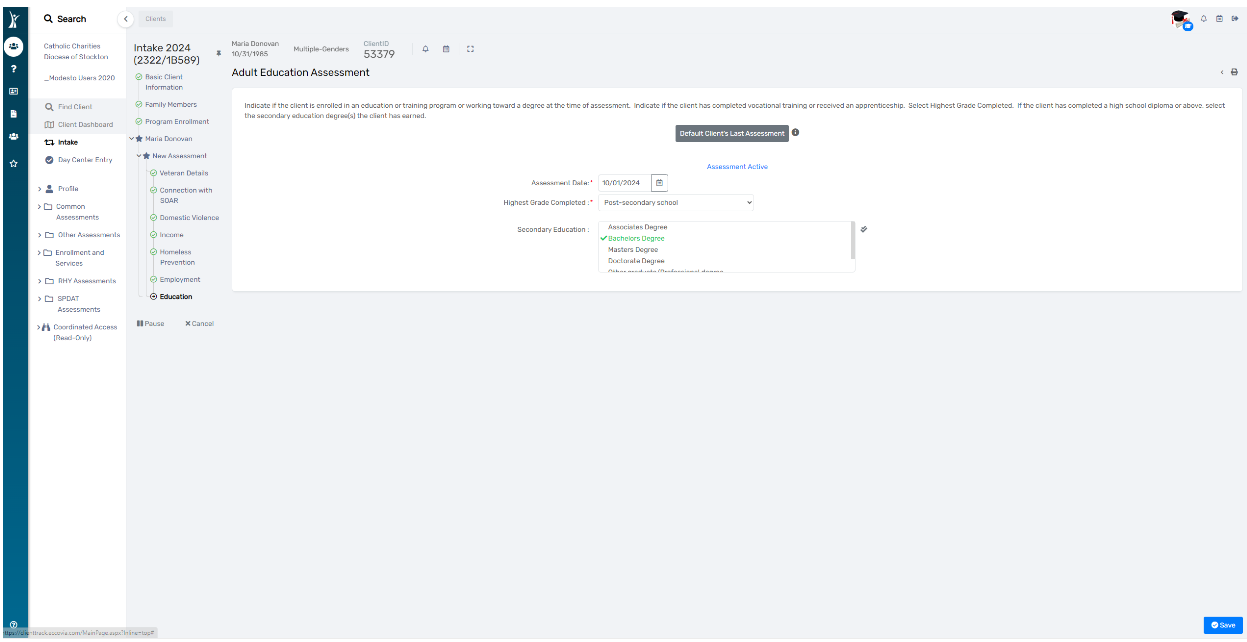


Employment Assessment

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



Education Assessment

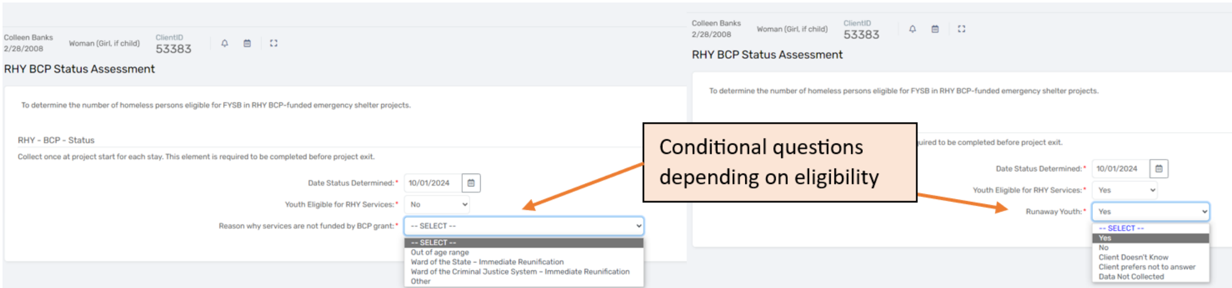


Runaway and Homeless Youth (RHY) Enrollment

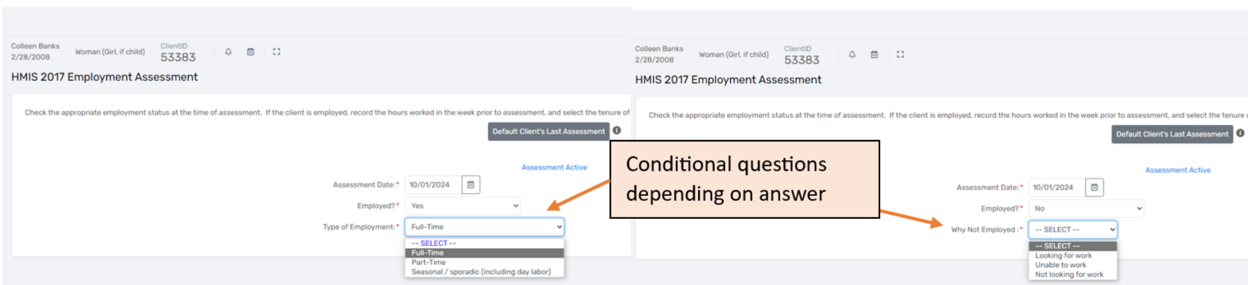
In addition to the previous assessments outlined earlier in this manual, a RHY enrollment will need additional required information upon intake.

Basic Center Program (BCP)

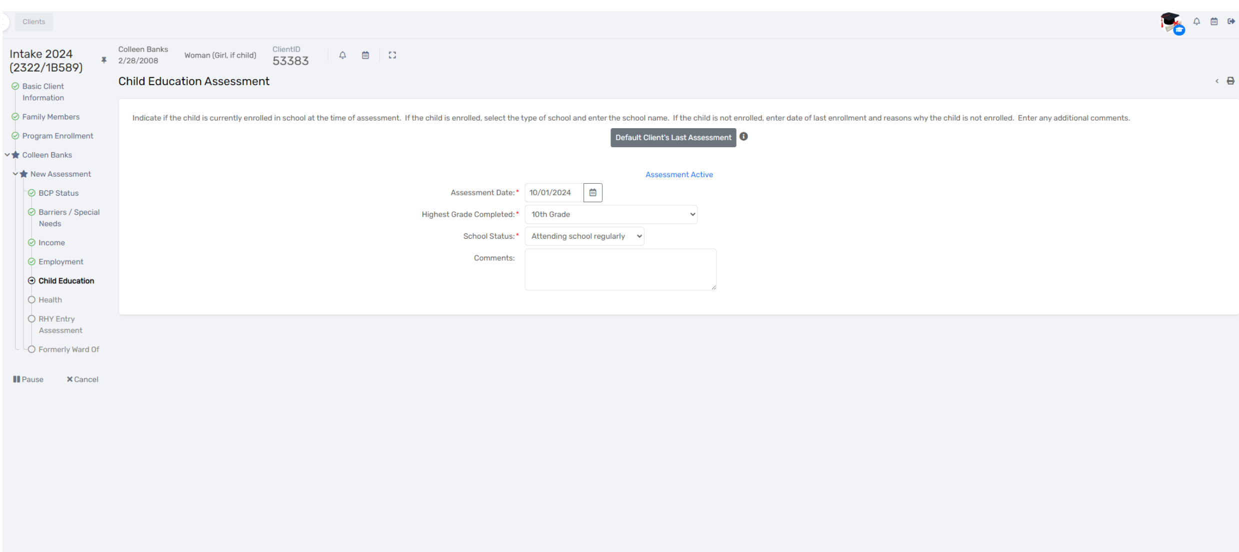
This assessment is for Basic Center Program-Emergency Shelter Programs Only. The RHY-BCP status occurs at the point which eligibility for FYSB has been determined. The status date may be on or after the project entry date. **Note:** If no is marked, then you must provide a reason.



Employment Assessment:

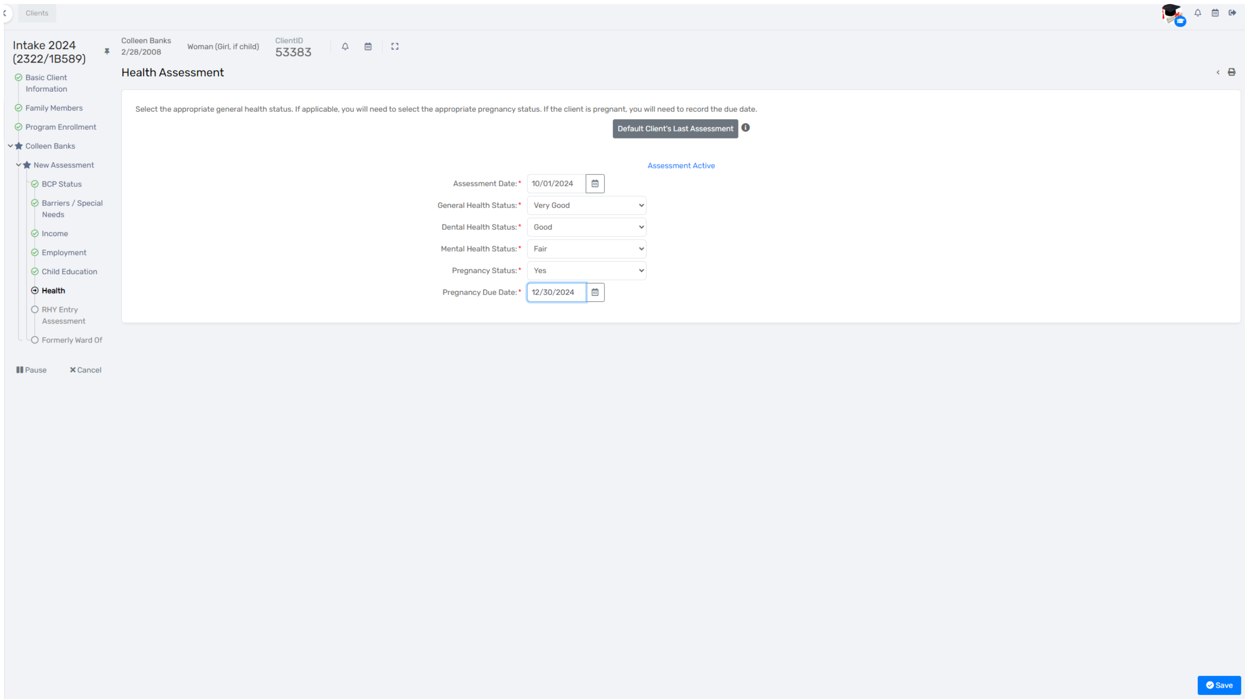


Education Assessment:

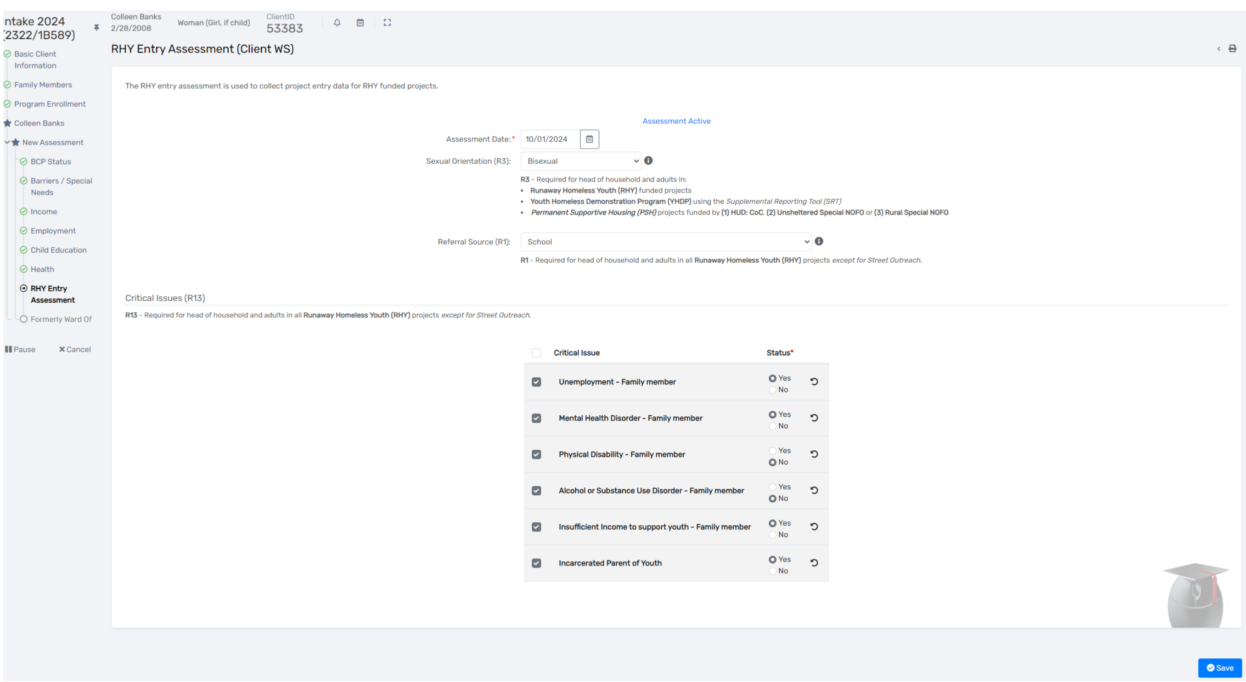


Health Assessment

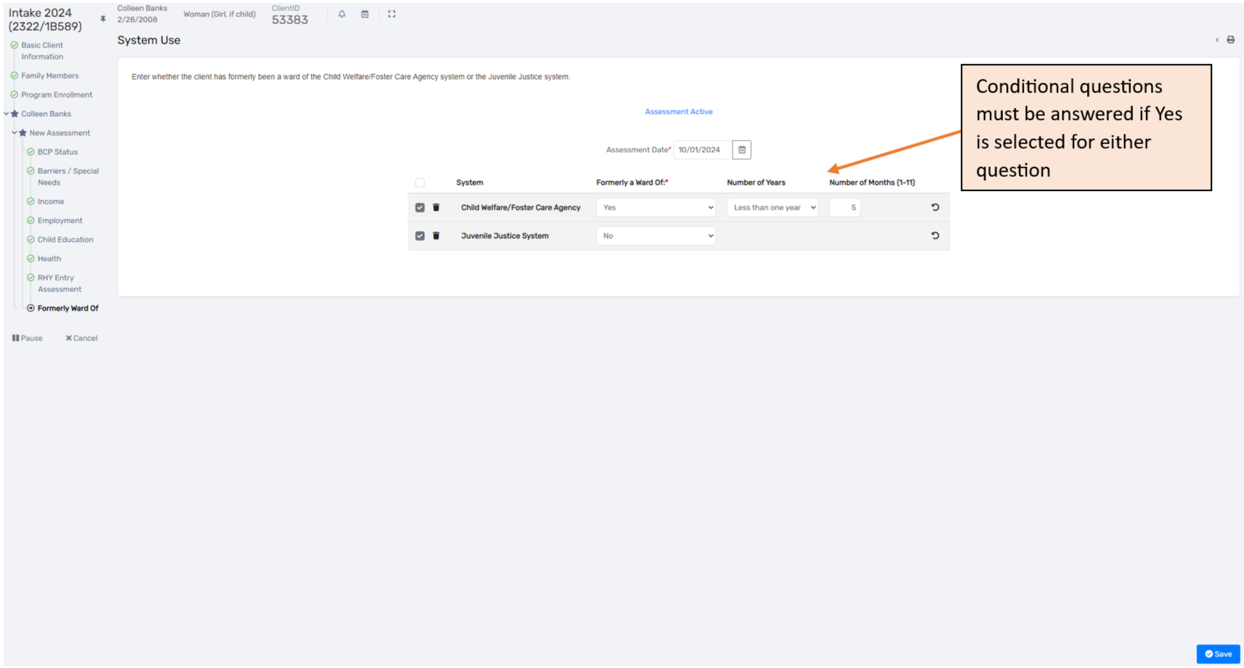
If Pregnancy Status is marked Yes, a Pregnancy Due Date must be entered.



RHY Entry Assessment



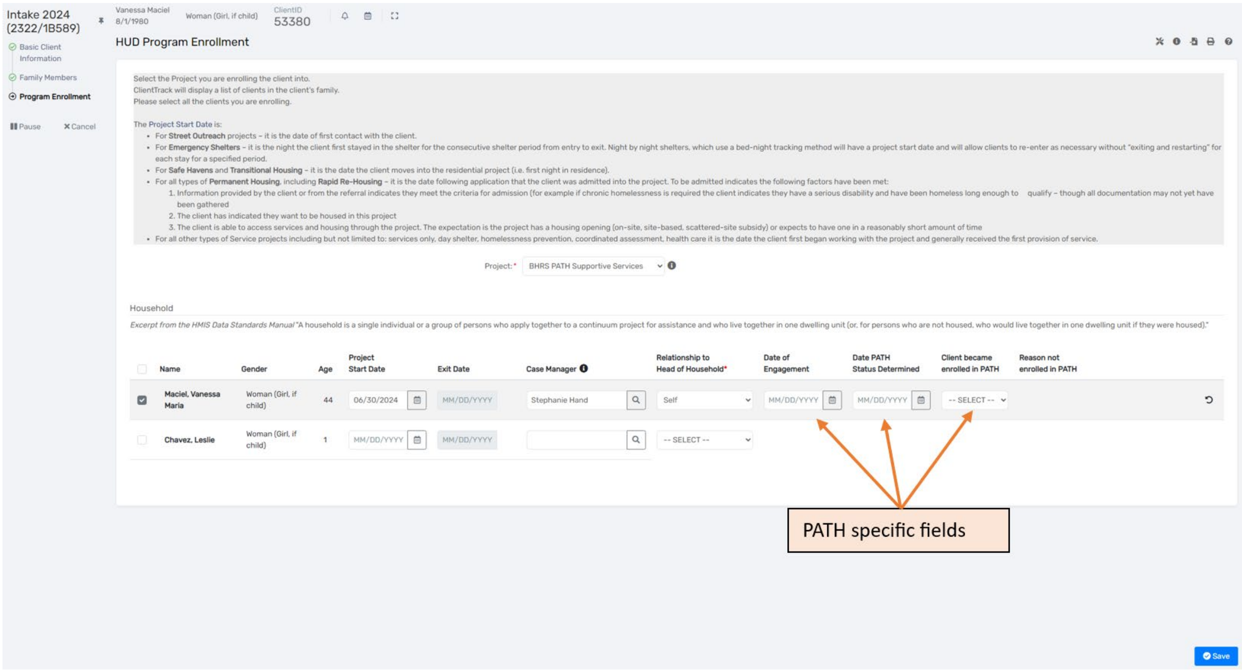
System Use Assessment



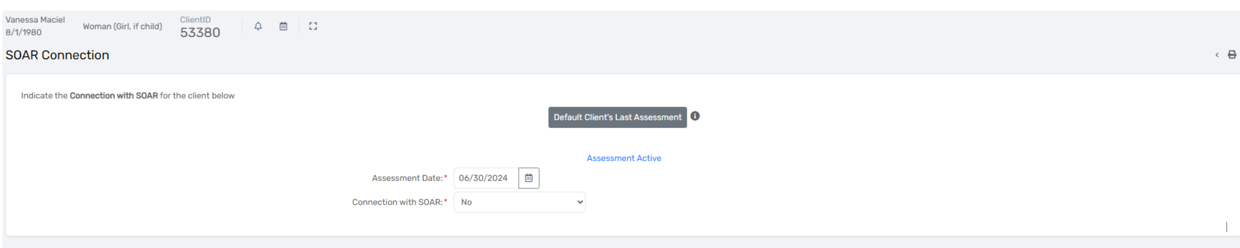
Projects for Assistance in Transition from Homelessness (PATH) Enrollment

Project Enrollment

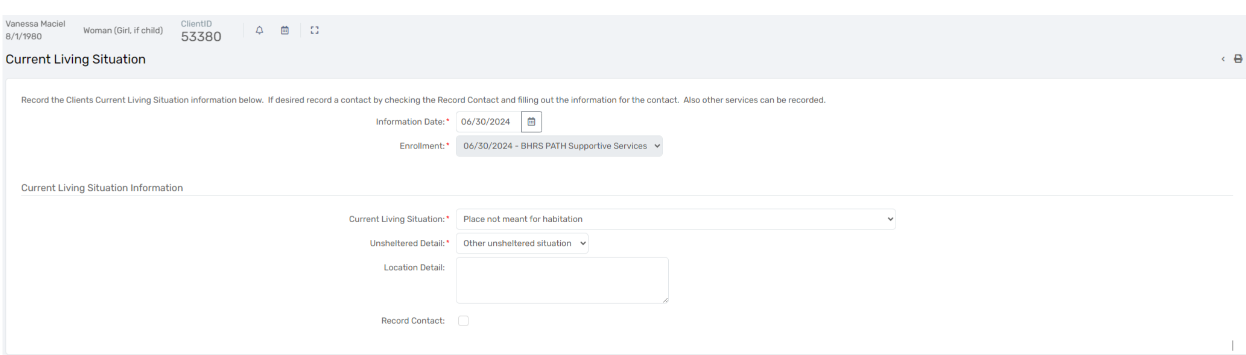
Make sure you add the Date of Engagement, Date PATH Status Determined, Client became enrolled in PATH, and if NO, Reason not enrolled in PATH, then click Save **Note:** You can close this section without Date of Engagement



SOAR Connection



Current Living Situation

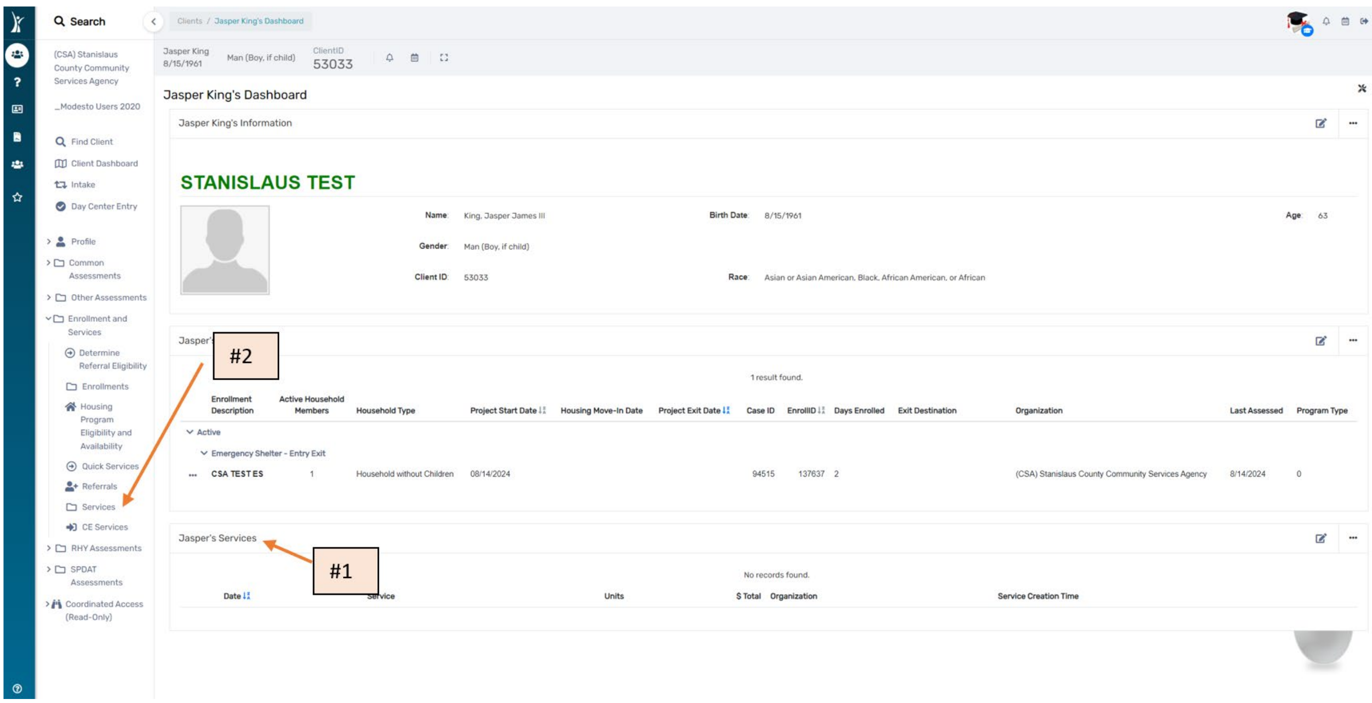


Add Services

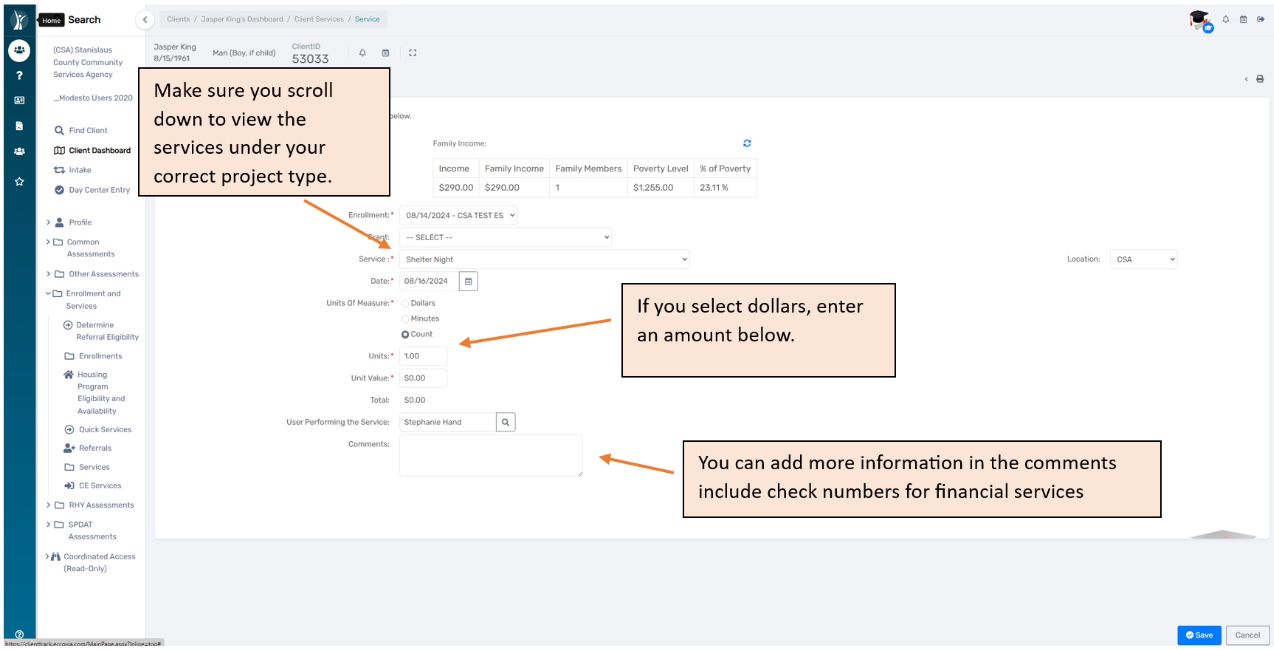
Currently RRH, SSVF, RHY, and PATH projects are required to enter services into HMIS. However, any project can track services. After completing an enrollment for a client, you can document services associated with the project enrollment two ways:

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

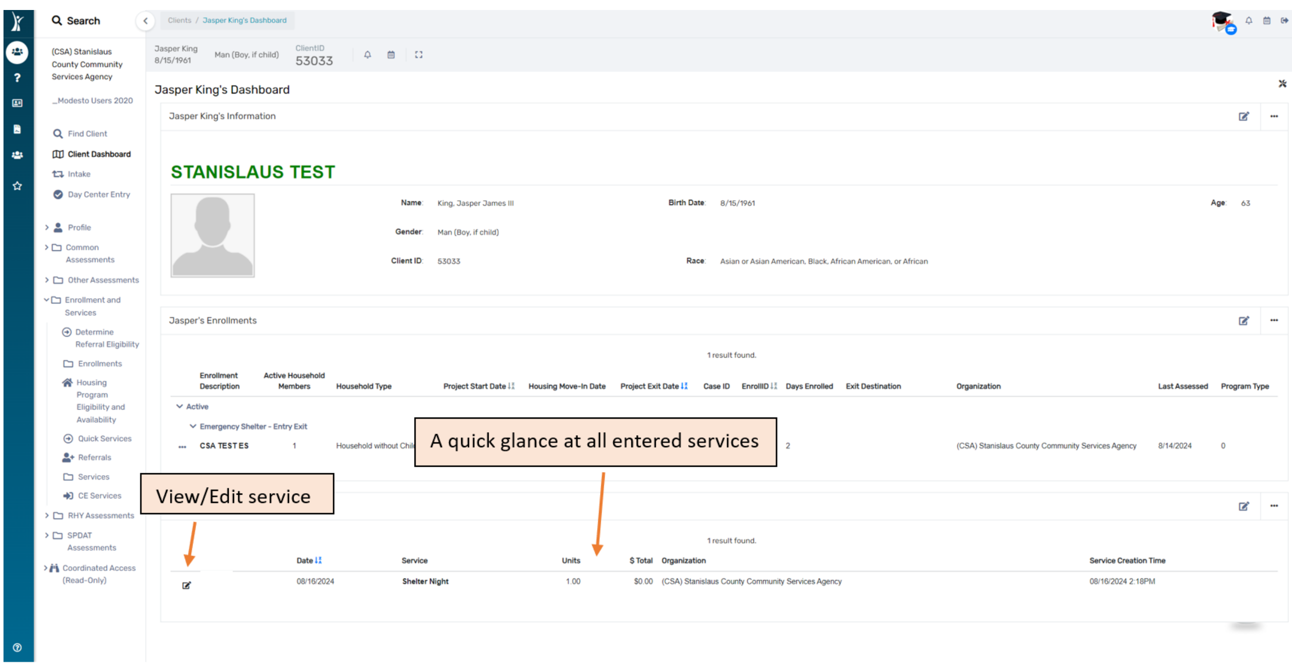
#2 From the Client Dashboard, navigate to the Enrollment and Services tab and go to Services.



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.



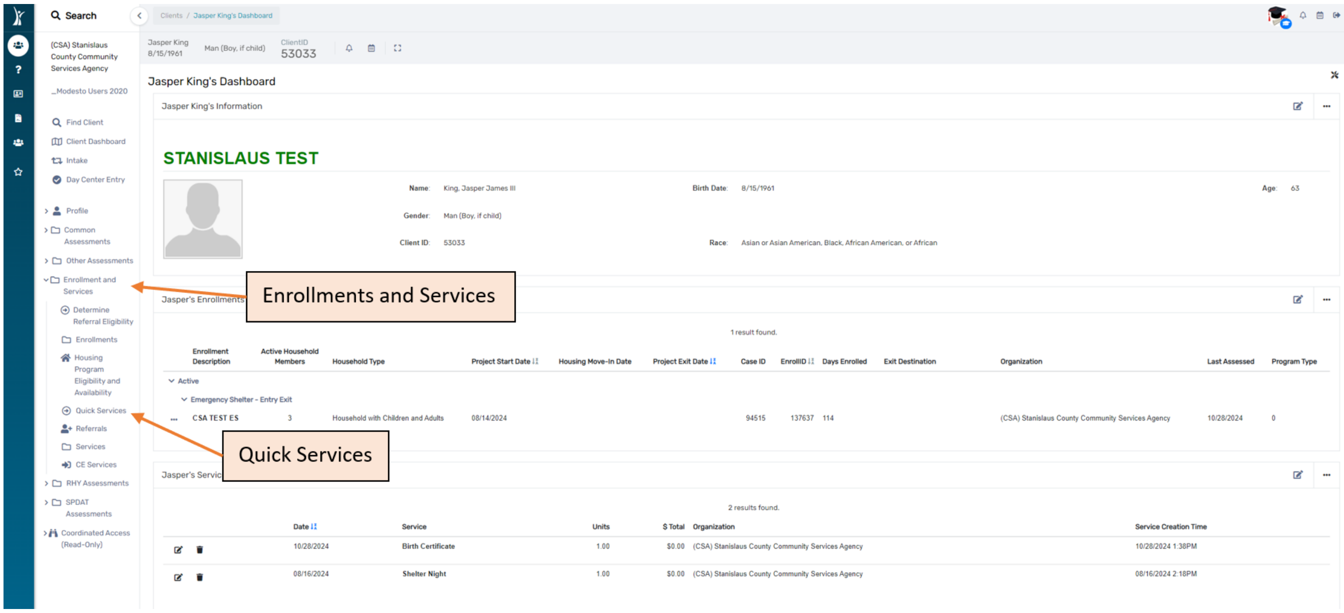
You can view entered services the same way you add a new service. You are also able to edit a service. If you need a service deleted, please submit an issue ticket with the service type, the date, and the reason for removal.



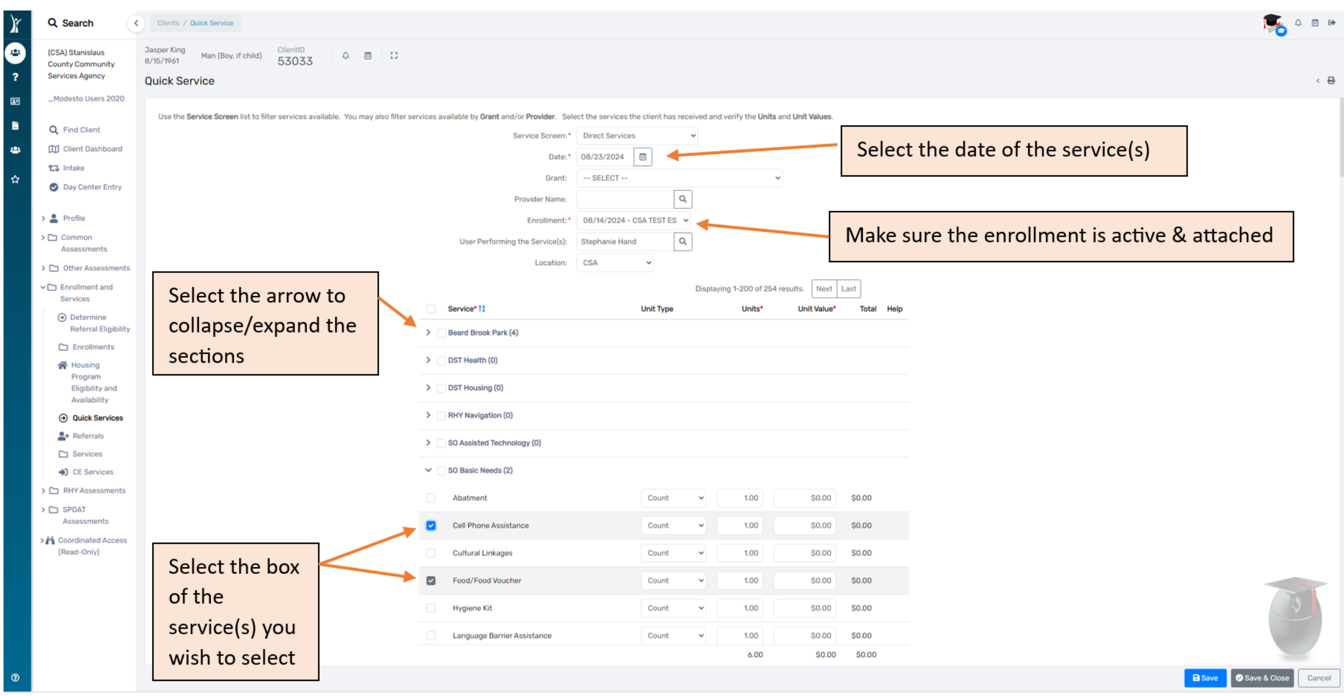
Quick Services

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.

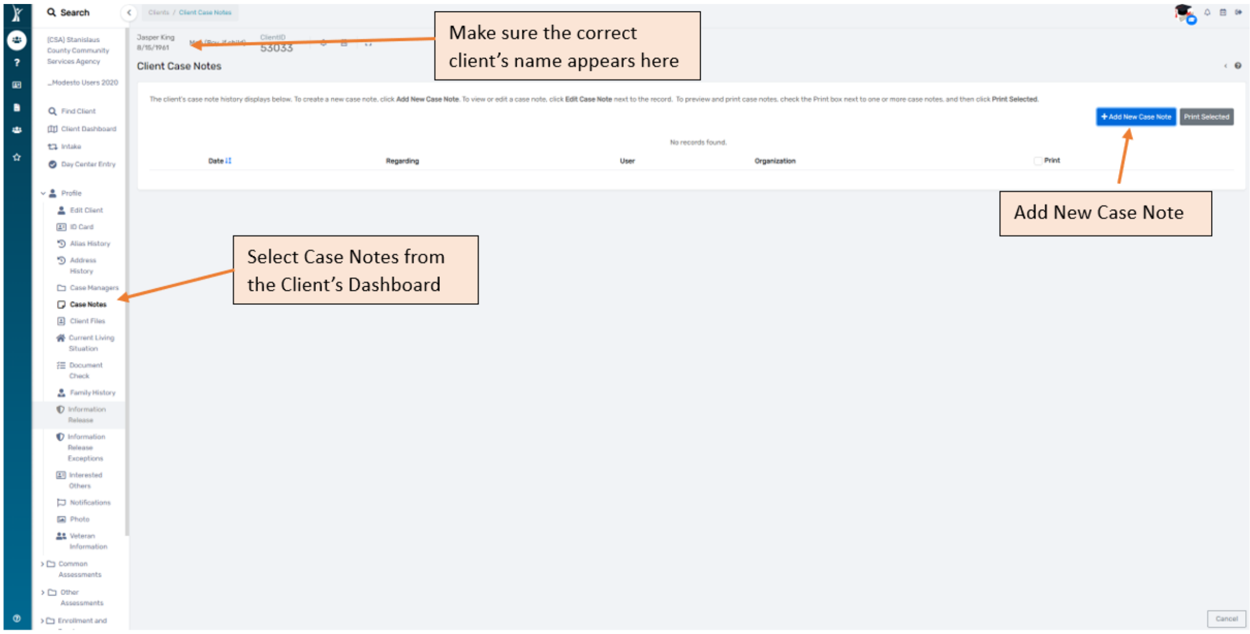


Enter the date of the service(s). **Note:** all recorded services must be recorded on the same date. You are also unable to add services notes through Quick Services. Select the enrollment you wish to attach the service(s) to. Select the box next to the service(s) you wish to enter. You may change the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

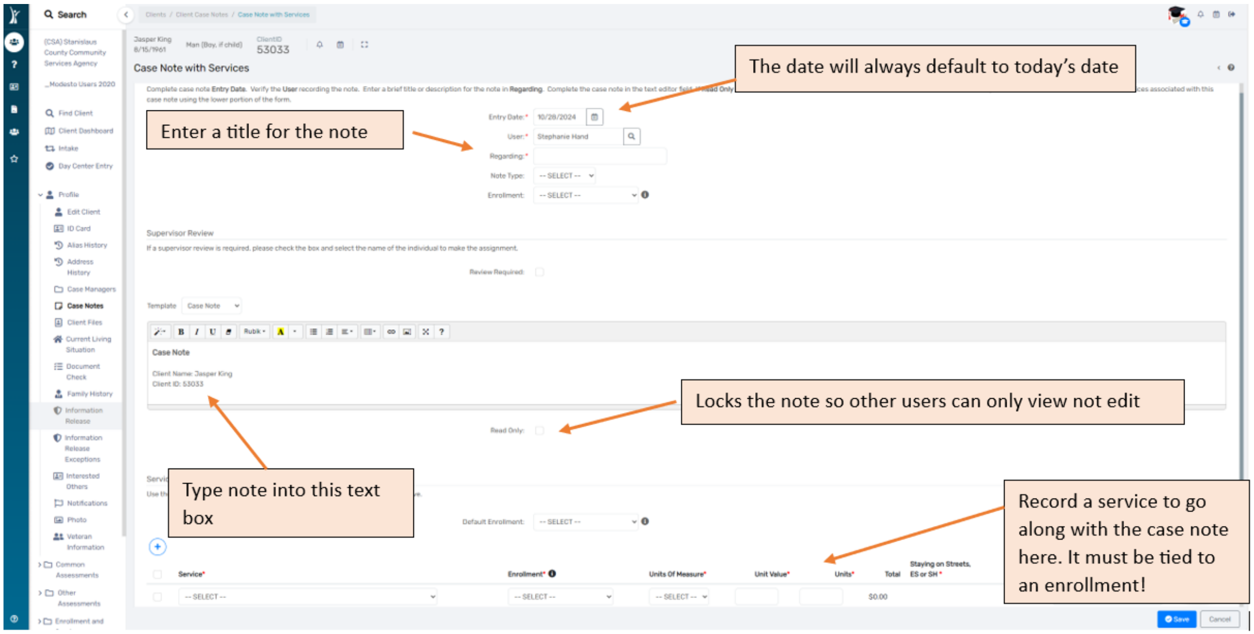


Add Case Notes

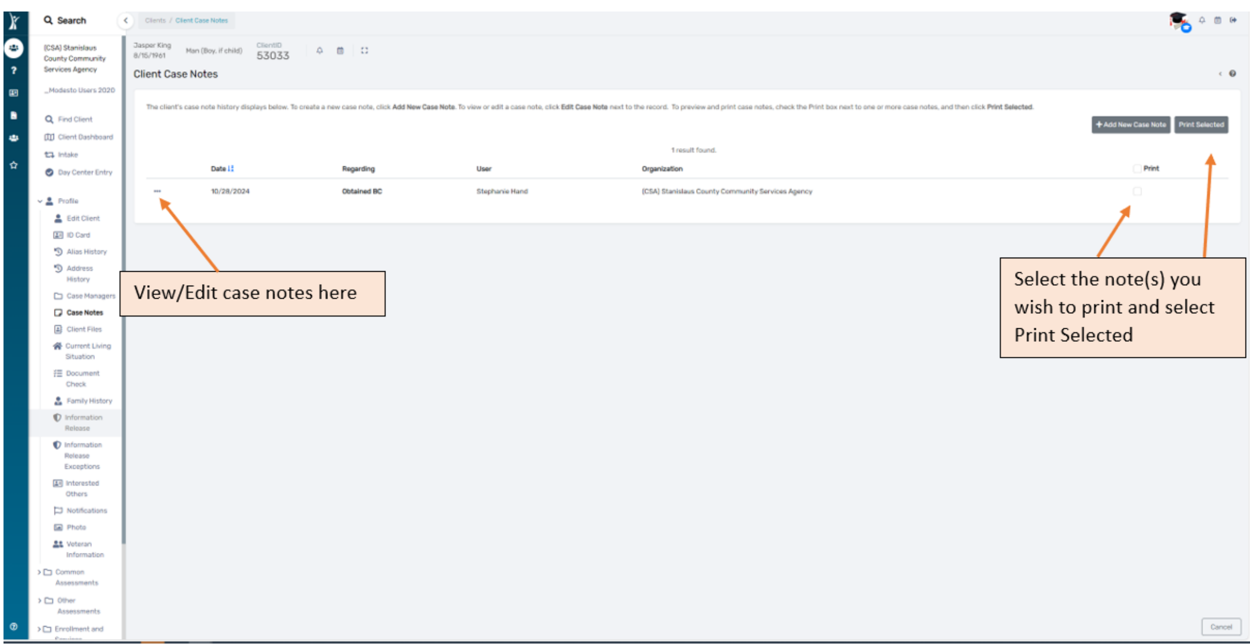
To add case notes, navigate to the Client Dashboard and select Profile from the options on the left-hand side of the screen. Make sure you are on the client's dashboard in which you would like to record a case note.



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.



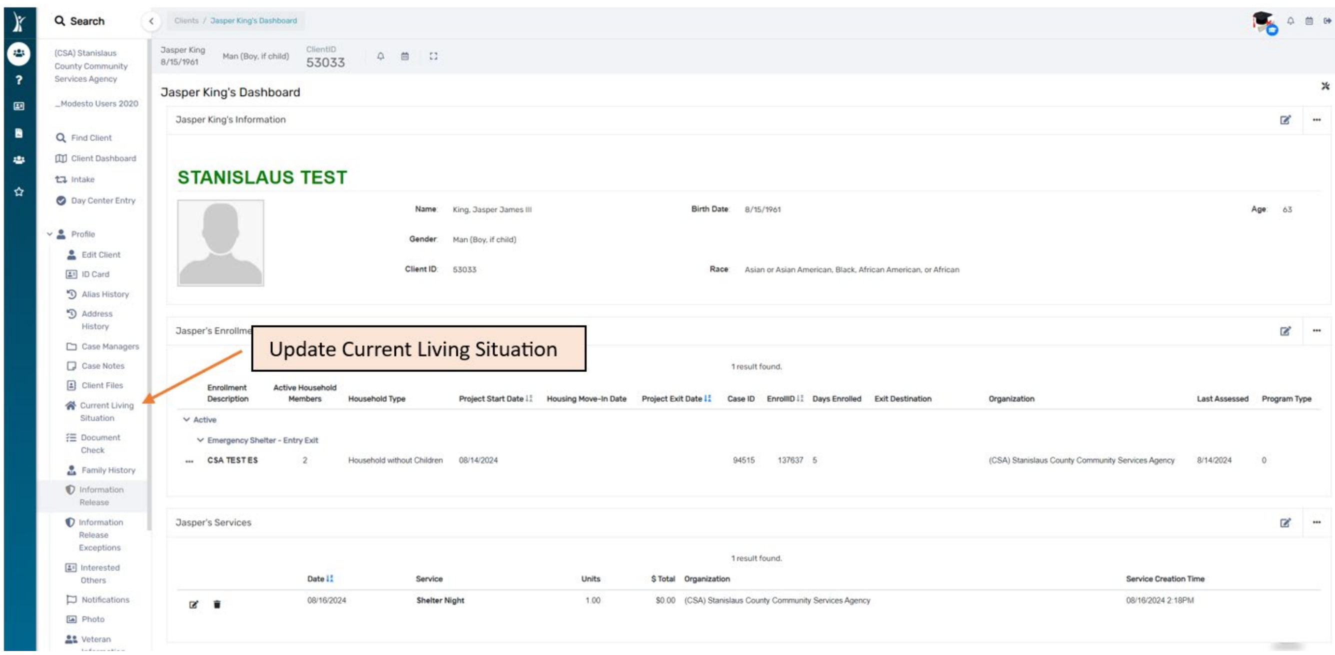
Once you save the note, you will return to the Case Notes page. From here, you can edit, view, or print your note. **Note:** Case notes are restricted to case managers within your organization. No one outside of your organization can view your case note.



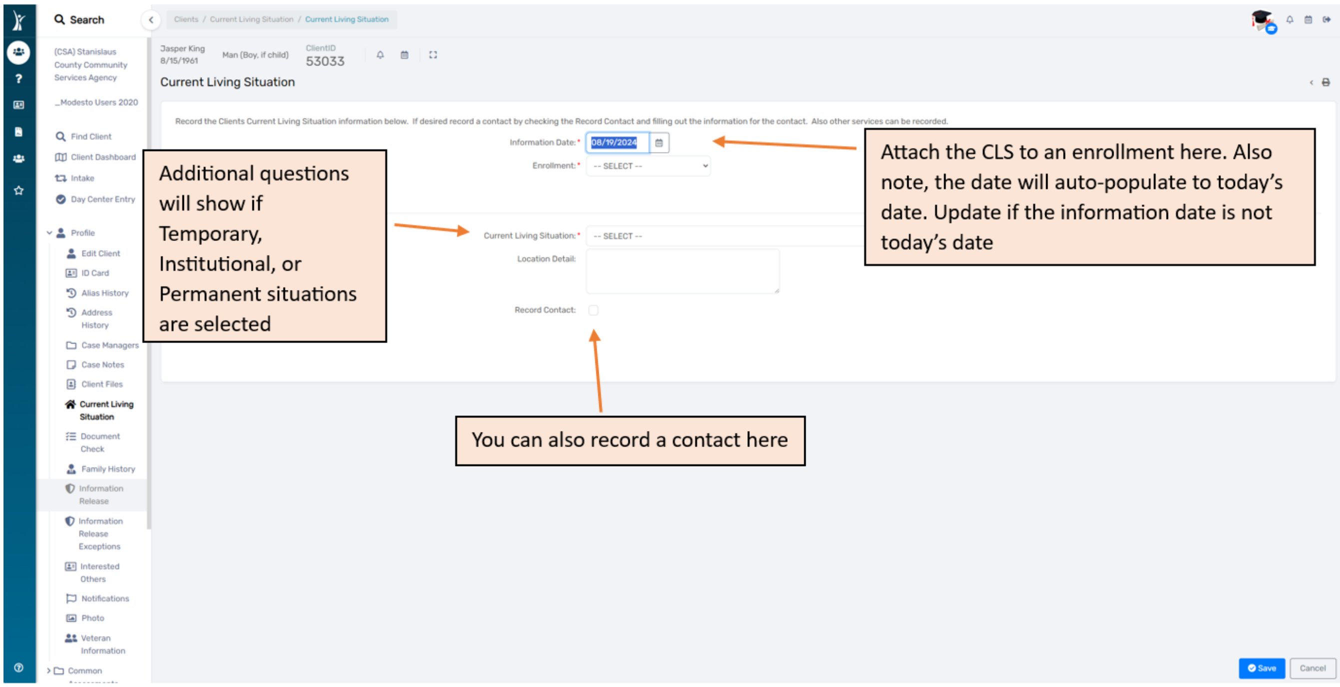
Add a Current Living Situation (CLS)

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.

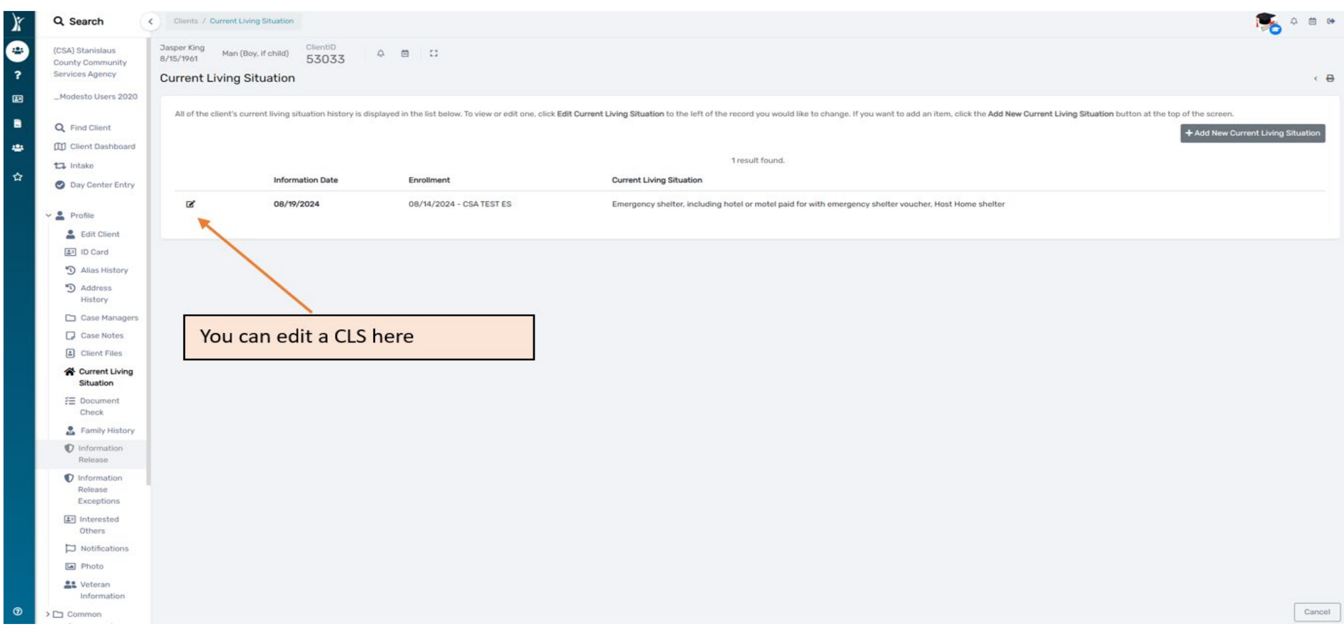
Navigate to the Client's Profile to update their Current Living Situation



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.

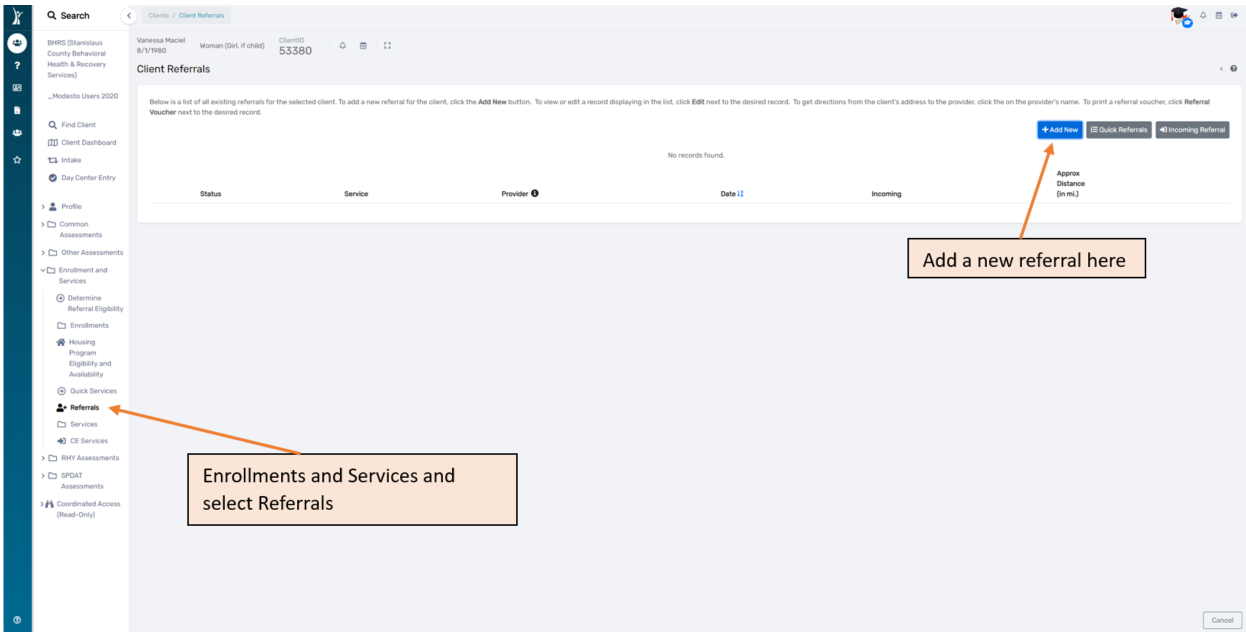


Once completed, you will return to the CLS screen in the previous step. You will be able to see the CLS you completed as well as and additional CLSs. **Note:** if you are only able to see your organization's entered CLSs (except for Coordinated Entry entries). For Coordinated Entry, if a CLS is not added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

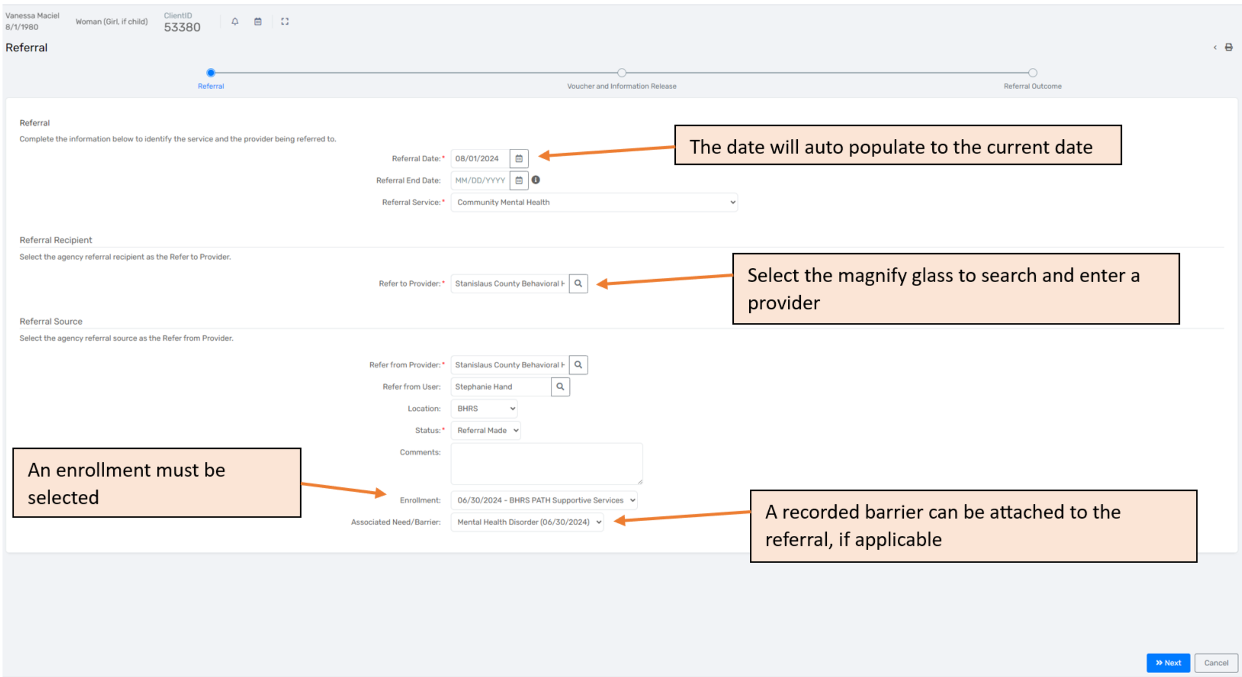


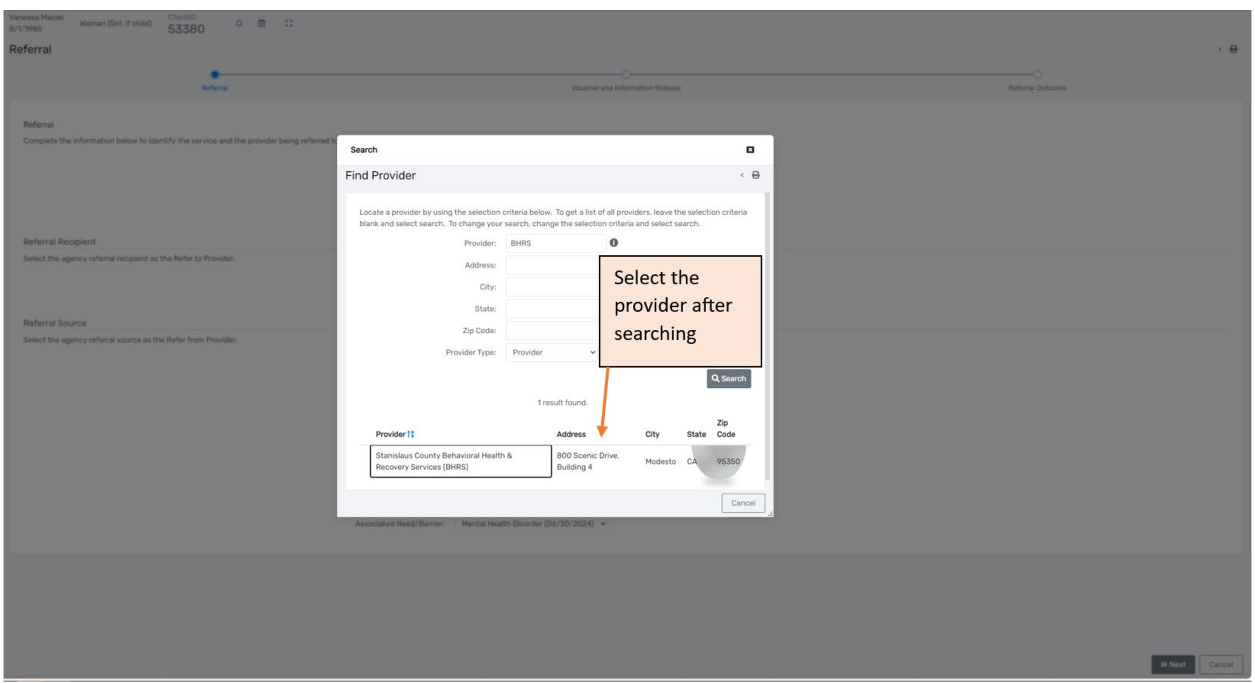
Add Referrals

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.

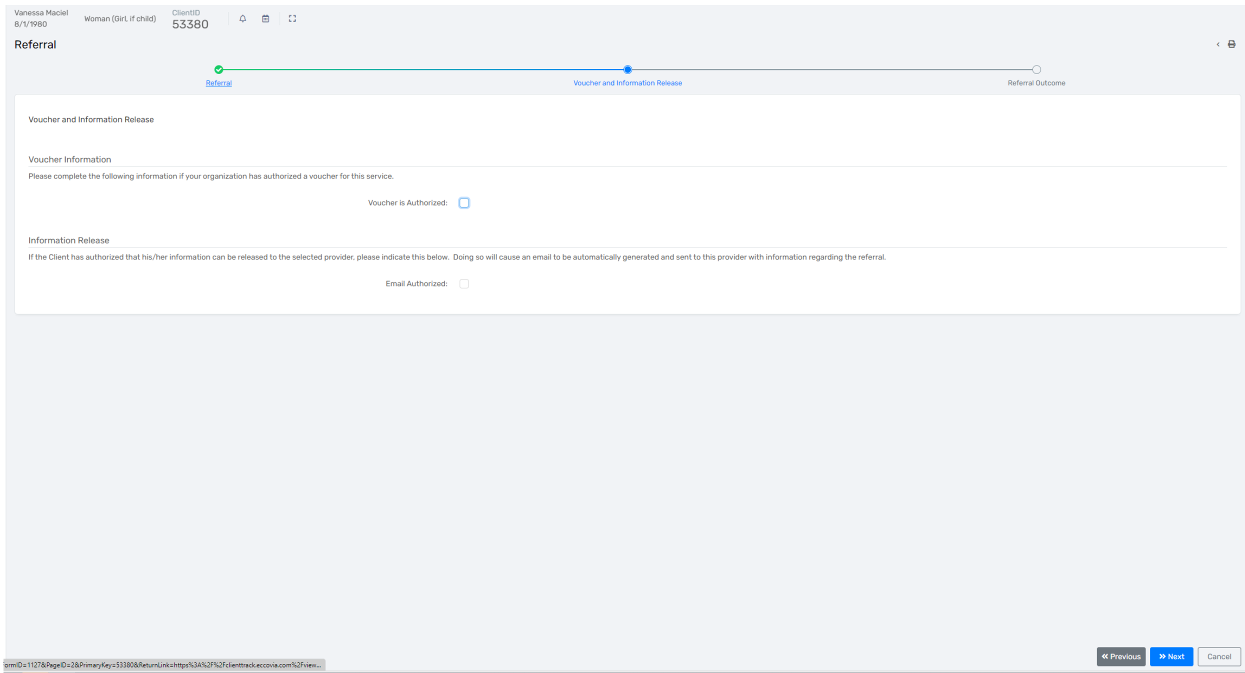


Change the Referral Date to the date the referral was made, if applicable. Record the Referral Service from the drop-down list. You can select the magnify glass to search the system for a provider. An enrollment must be selected to ensure the referral is attached to your reporting. A recorded barrier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

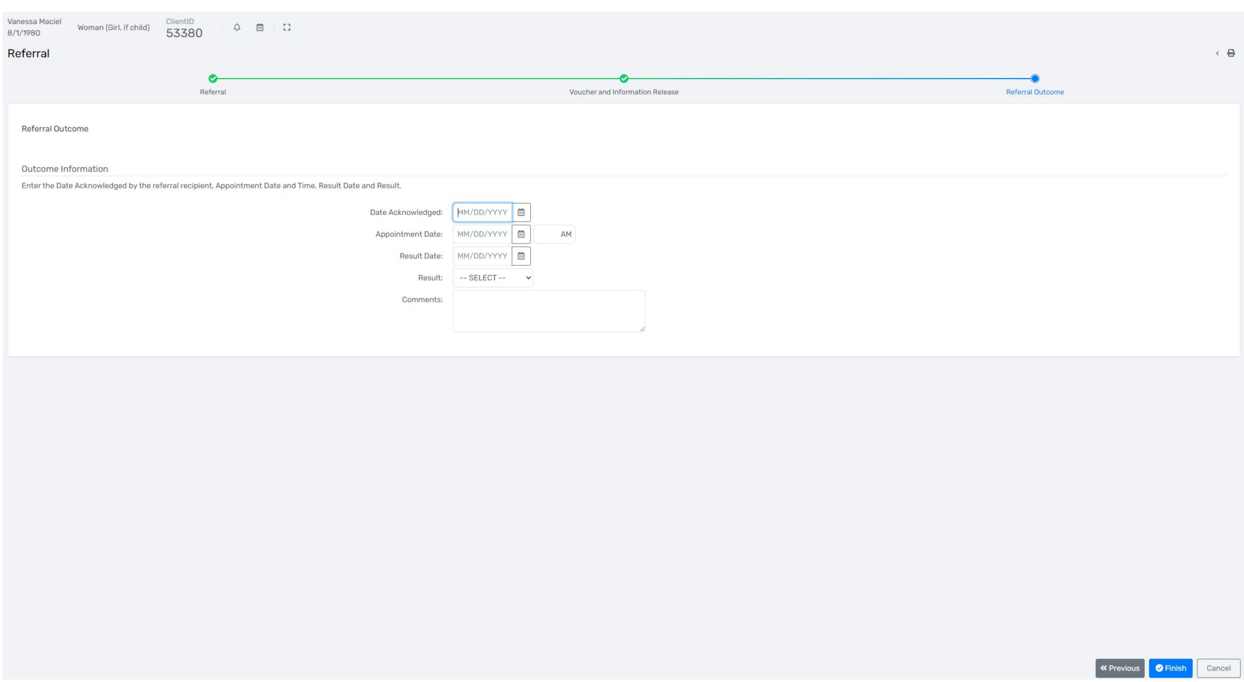

Referral
The date will auto populate to the current date
Select the magnify glass to search and enter a provider
An enrollment must be selected
A recorded barrier can be attached to the referral, if applicable


Find Provider
Select the provider after searching

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.

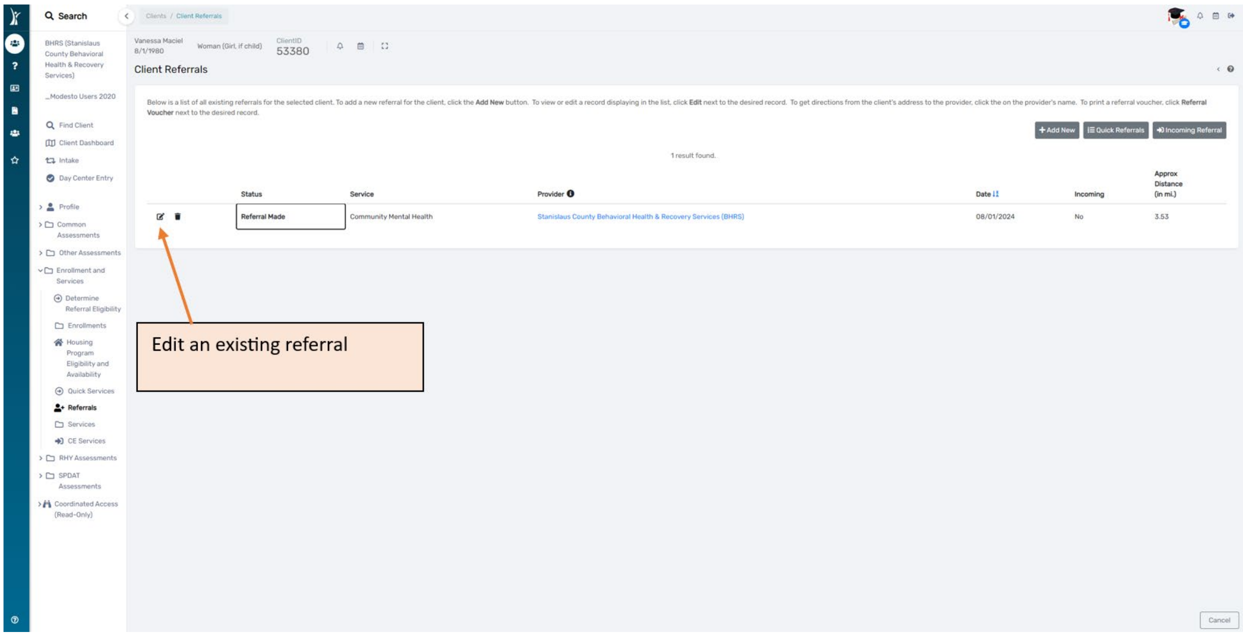


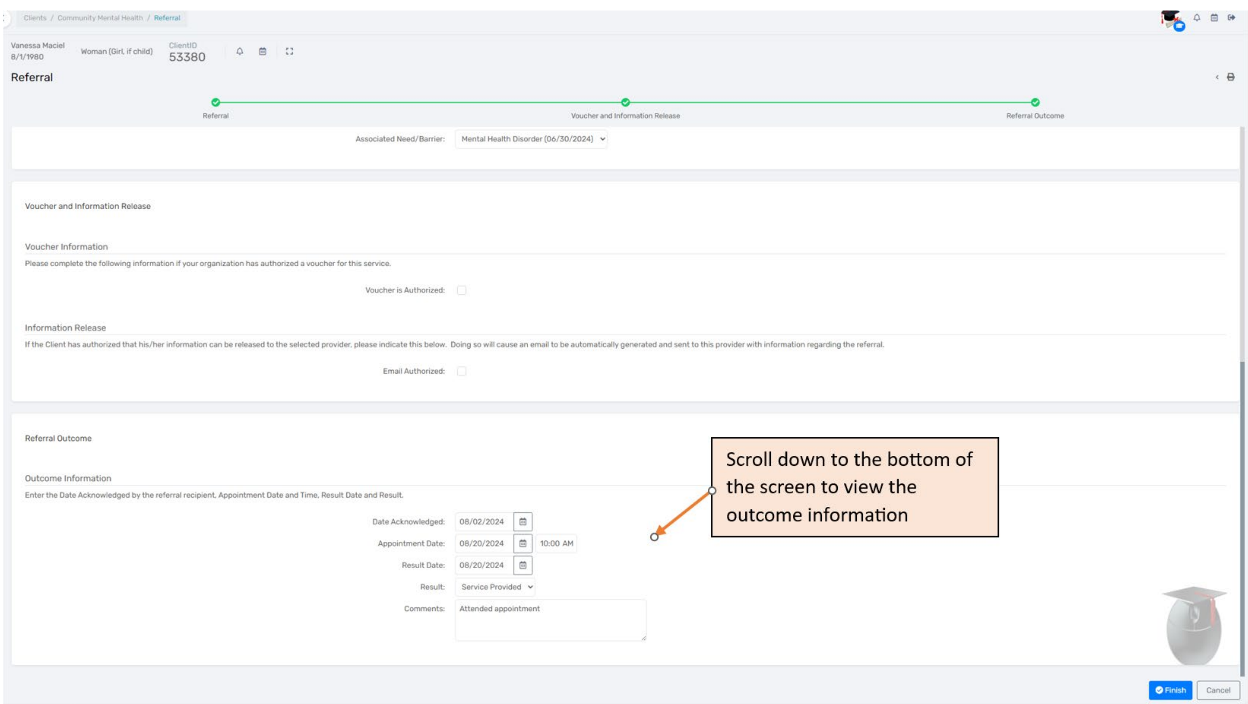
The Referral Outcome does not have to be completed at the time of recording the referral. This can be edited later and will be reviewed in the upcoming section.



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.



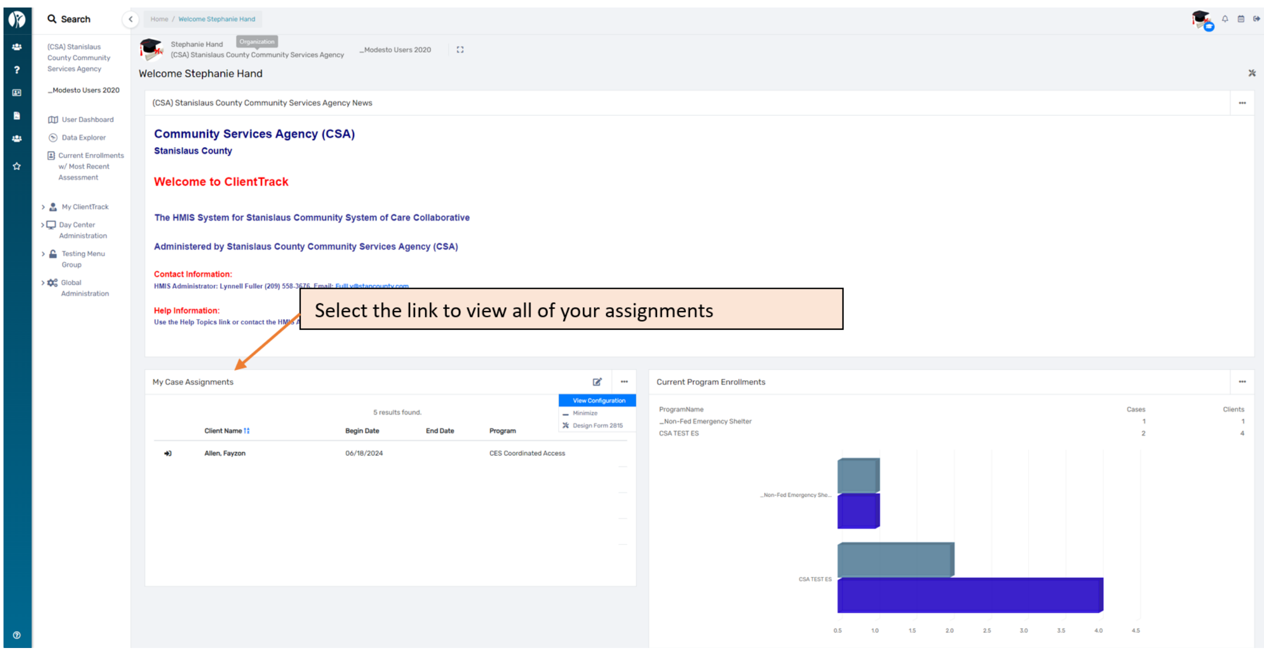


Case Manager Assignments

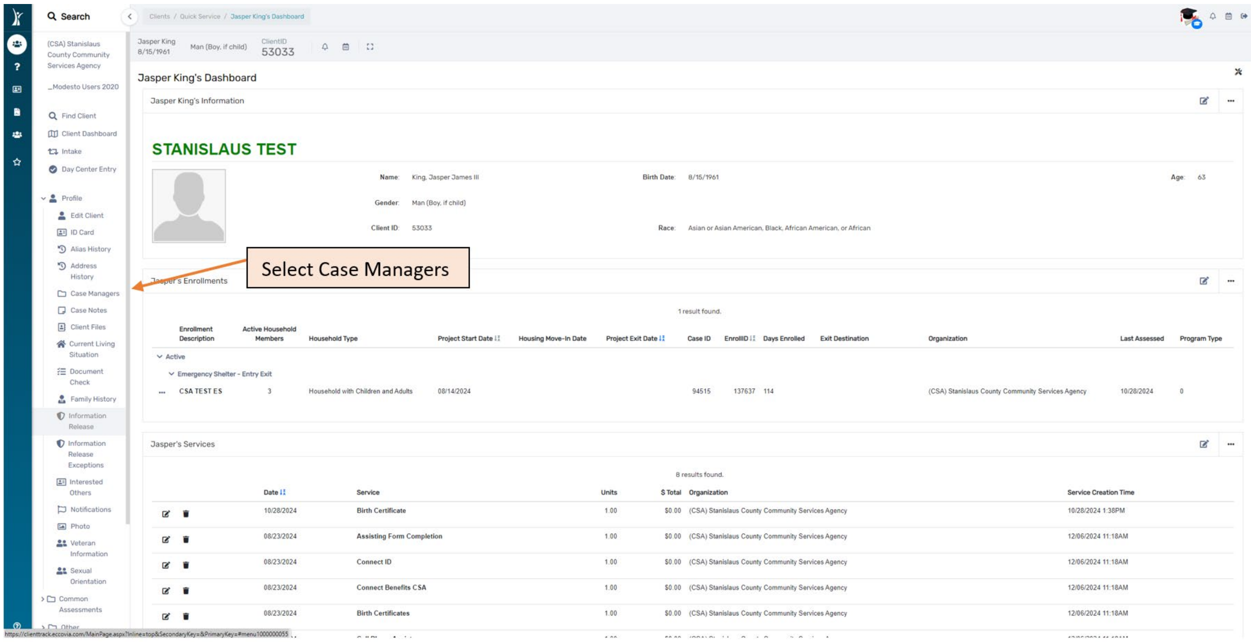
Case Manager screen shows a history of the client's case managers. The assigned case manager inside ClientTrack is the HMIS user assigned to that client's enrollment in a given program. A client can have multiple case managers assigned to their enrollment(s). The case manager is automatically assigned 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.

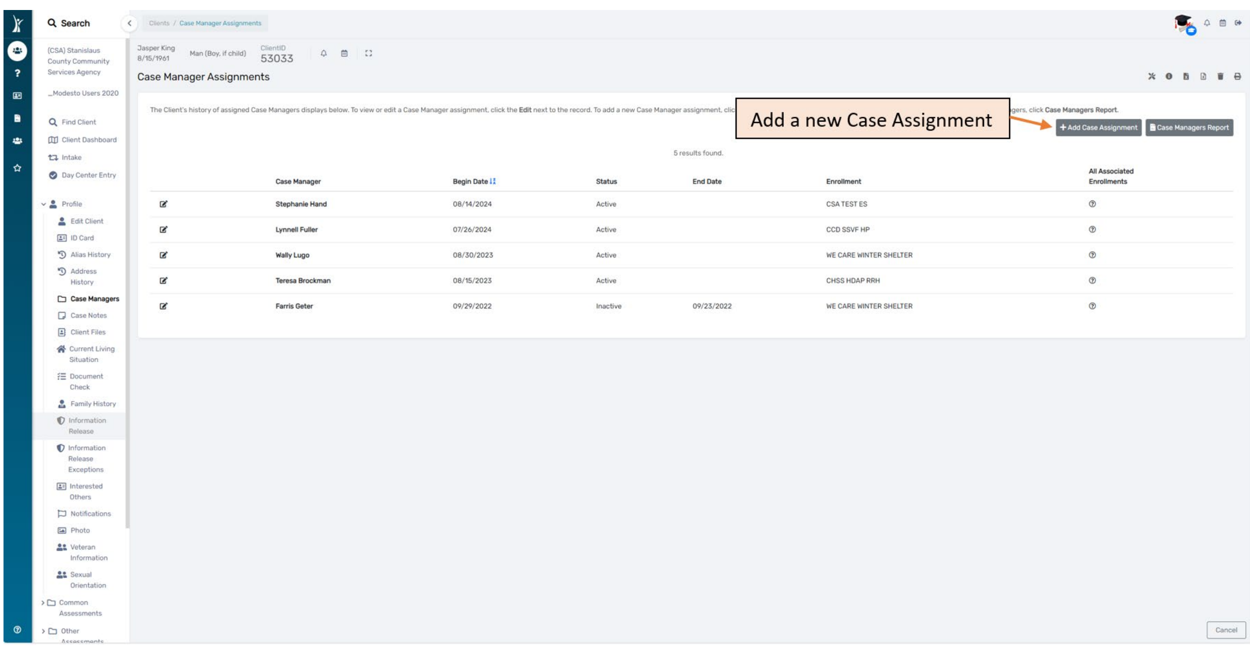


You can also view it on the client level. Start on the Client's Dashboard and select the Profile folder on the left-hand side of the screen.

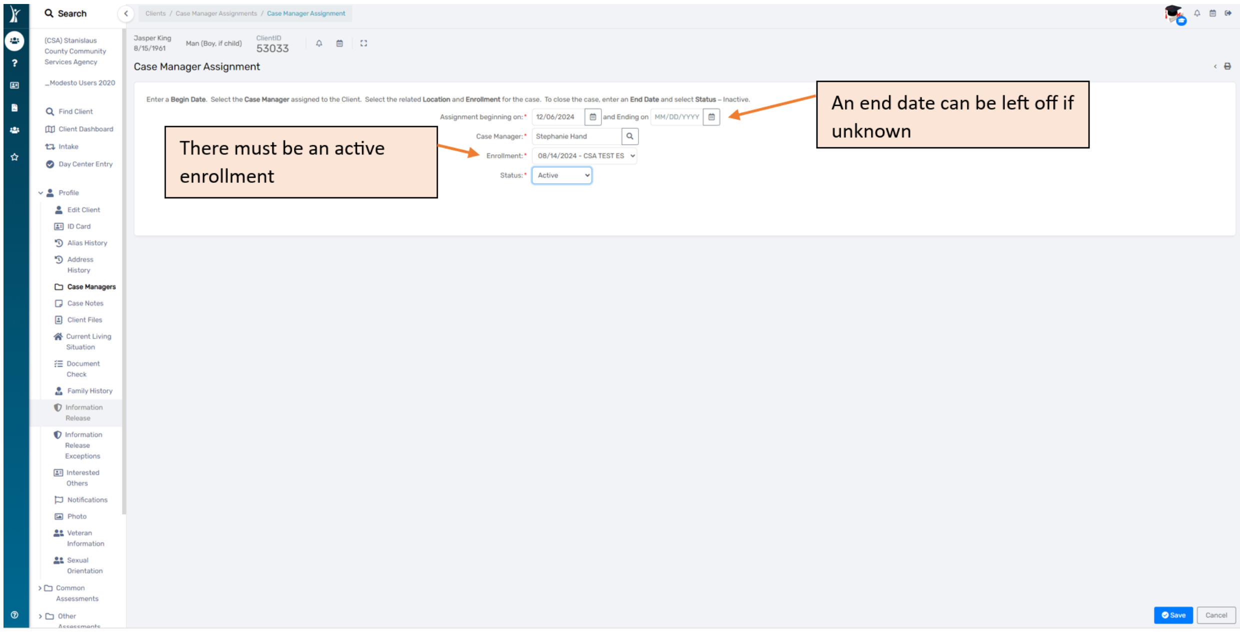


Add Case Management Assignment

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

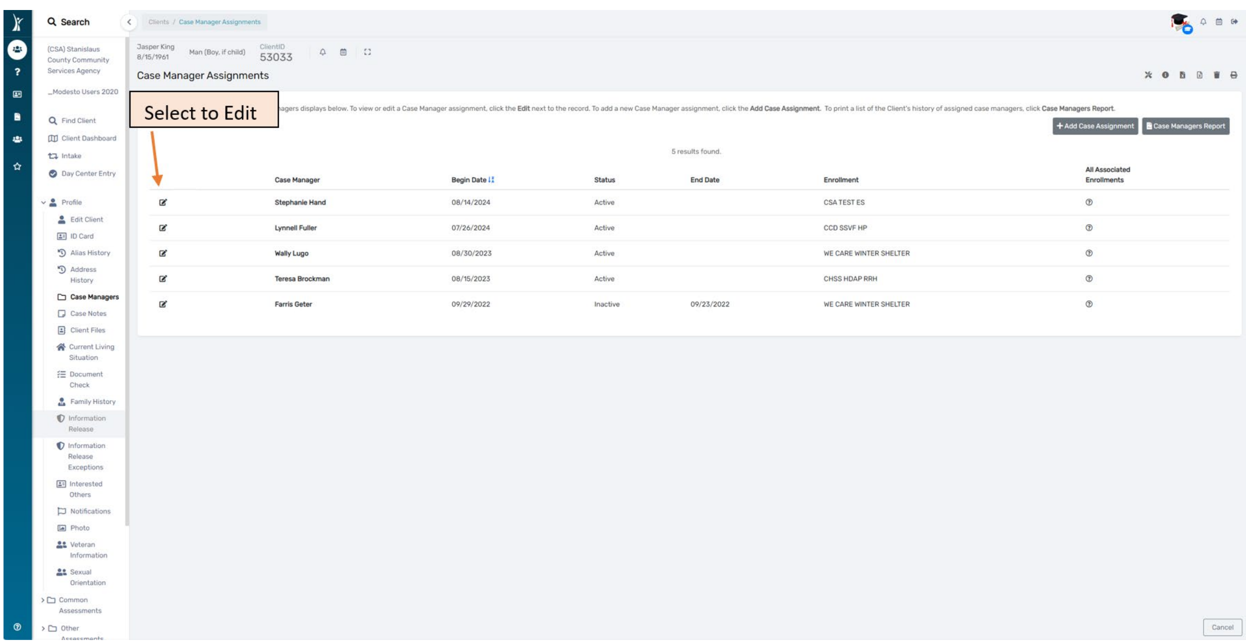


Select the date the case assignment will begin. An end date is not needed if the assignment is indefinite. There must be an active enrollment. Ensure the status is Active.

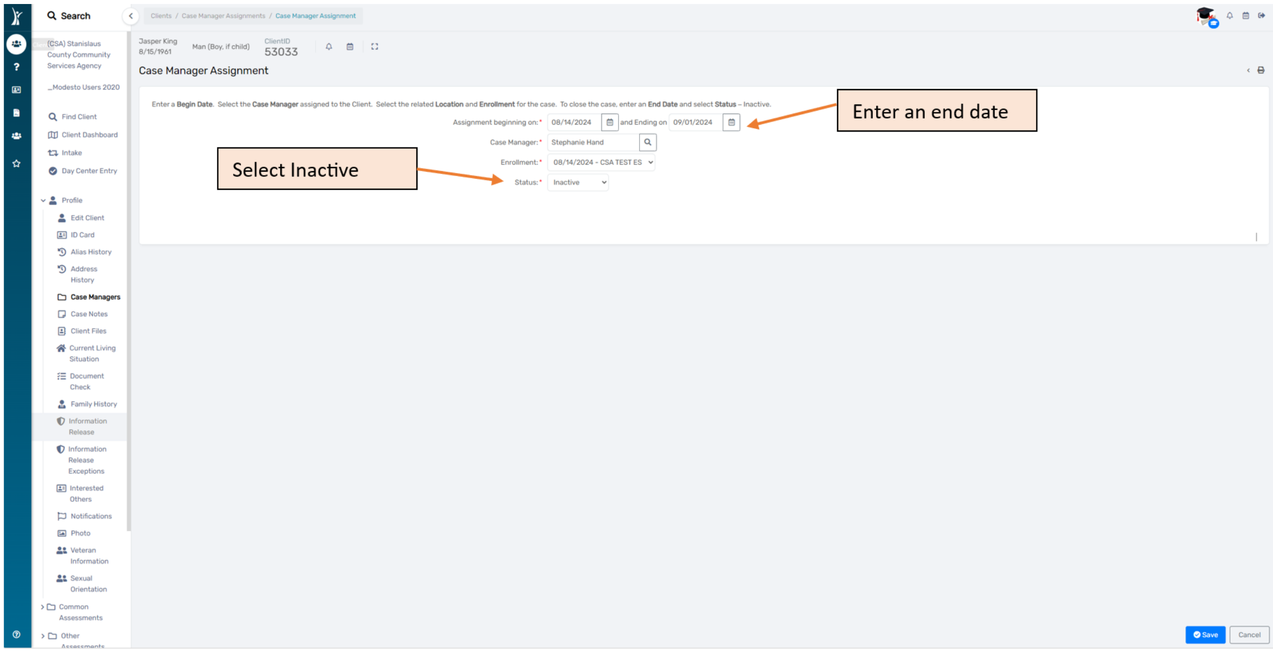


Edit a Case Manager Assignment

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



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

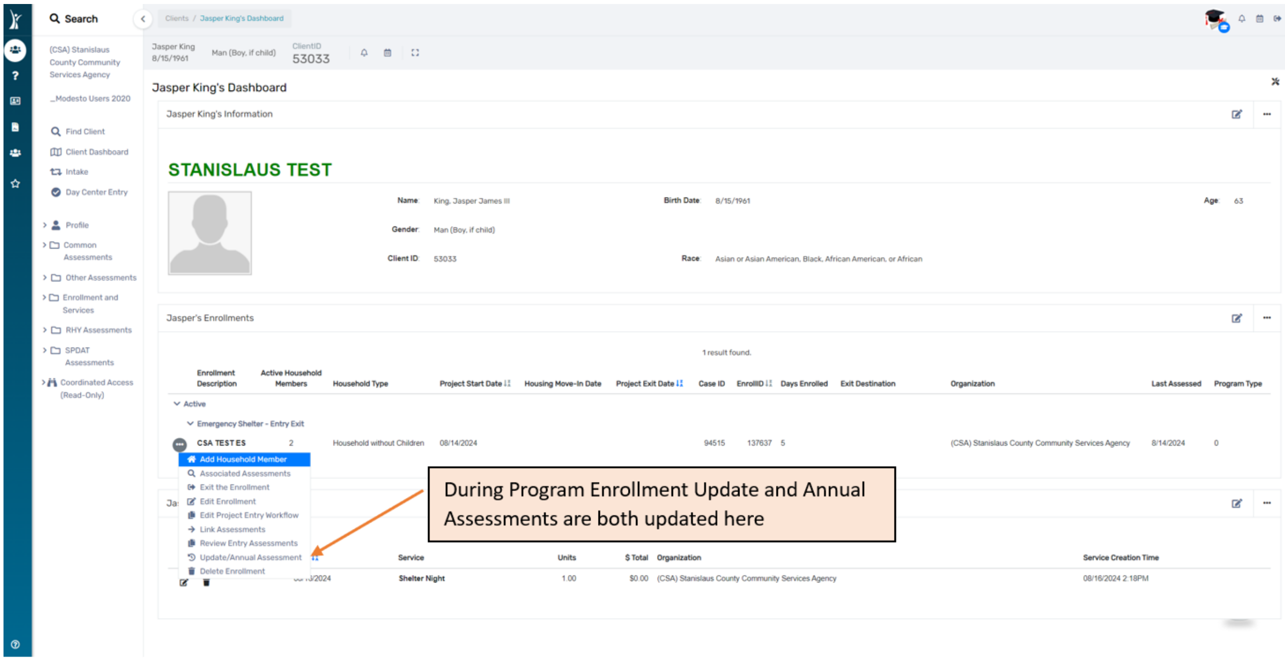


During Program Enrollment Update & Annual Assessment

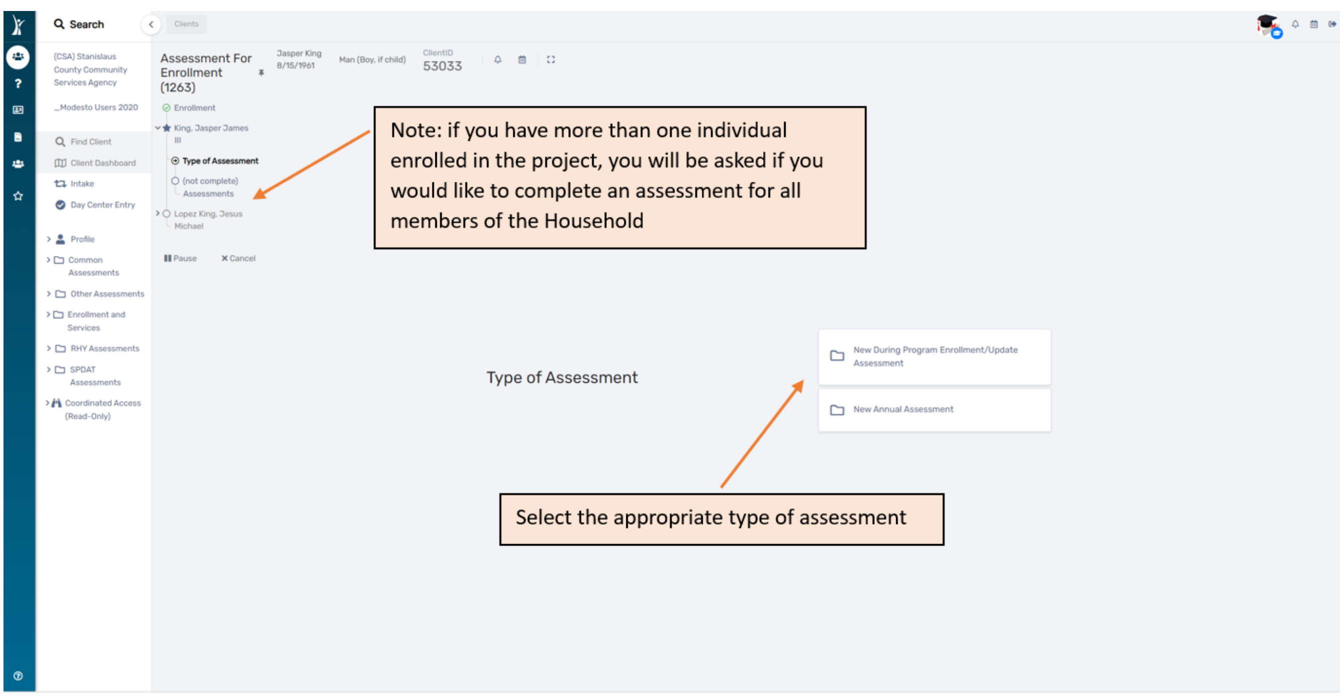
During Program Enrollments: Completed to capture changes to the client's Health Insurance, Income, Domestic Violence, Barriers, or Move-In Date. For children, you will be asked to update their Health Insurance and Barriers. This must also be completed for any child who turns 18 during the enrollment.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



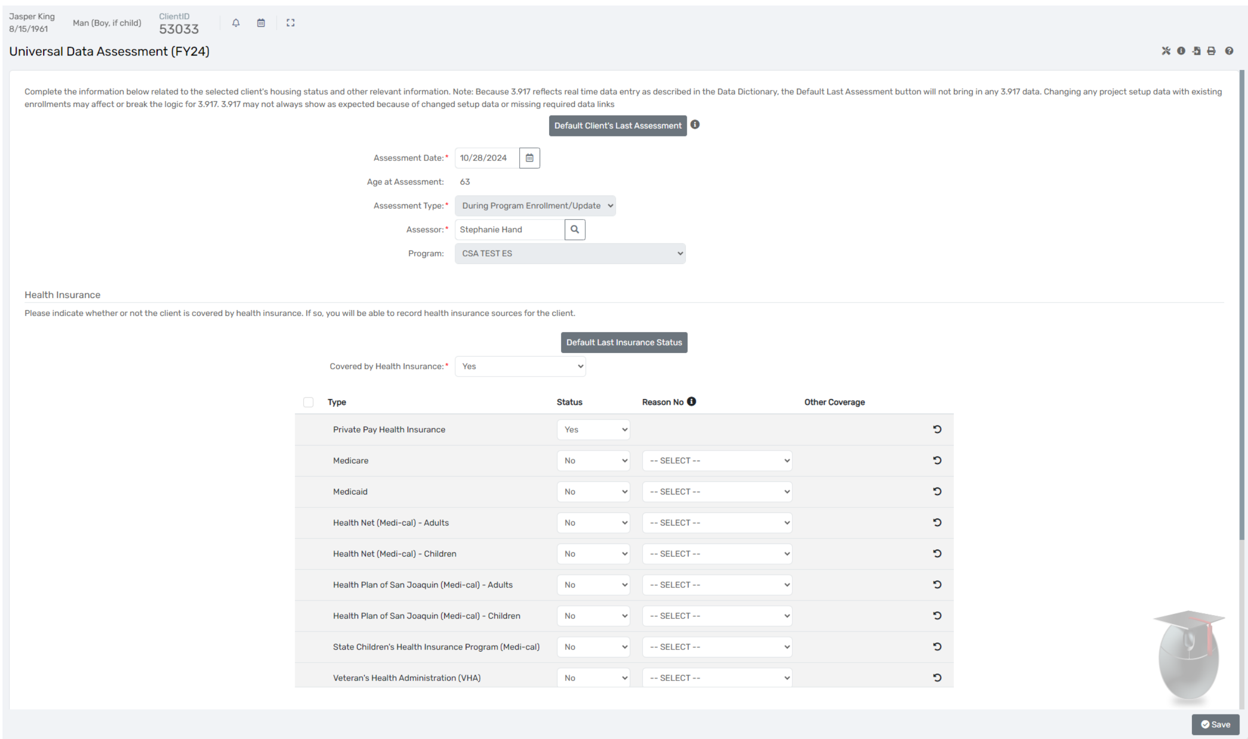
You see the Enrollment Screen; showing you who is currently in the enrollment. After you select No Changes, you will be asked to select the type of Assessment. Select the appropriate Assessment. **Note:** Each assessment asks different questions. Please ensure you have selected the appropriate Assessment.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



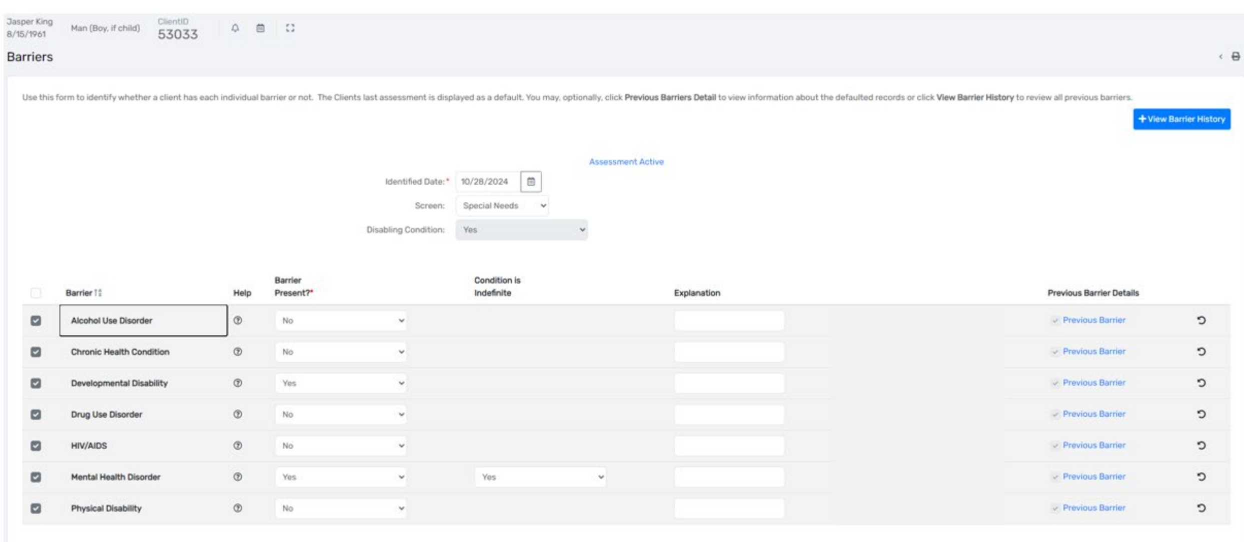
During Program Enrollment Update

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).

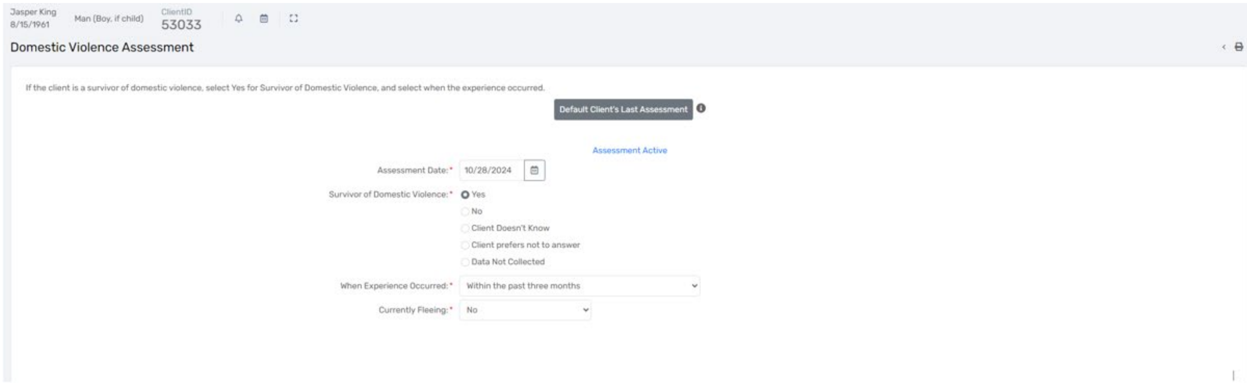
Universal Data Assessment:



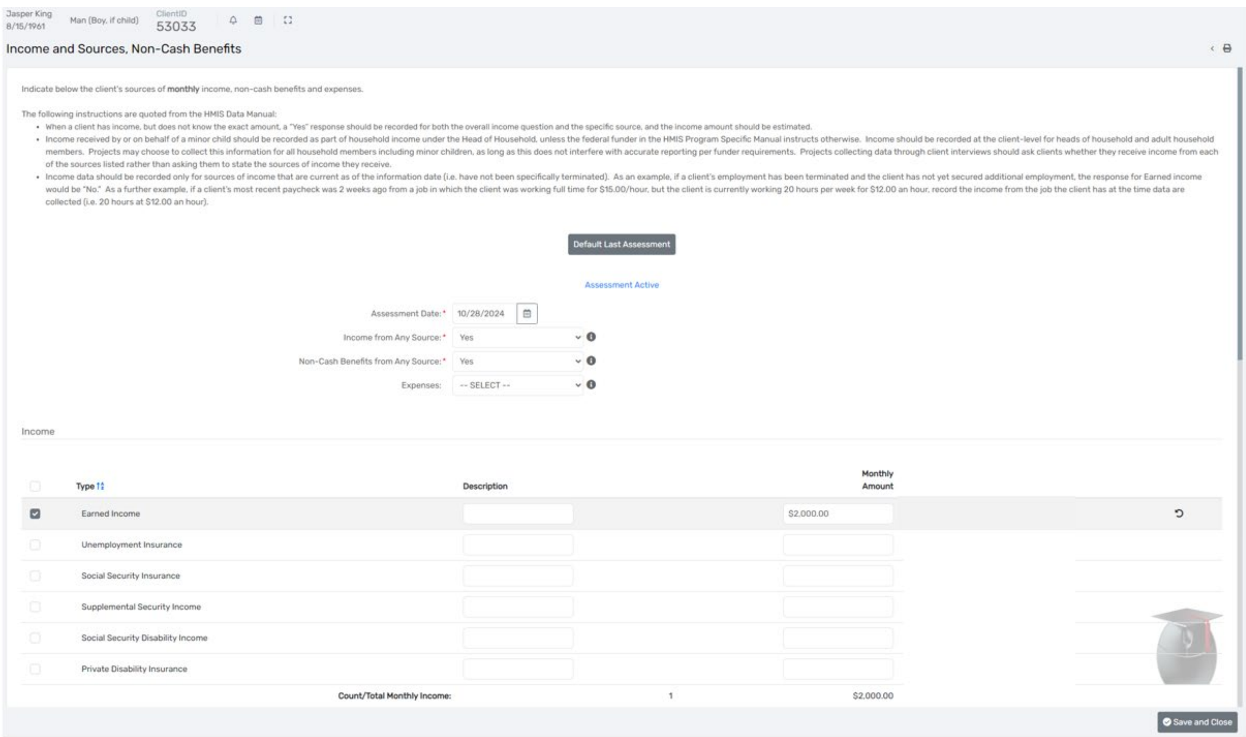
Barrier Assessment:



Domestic Violence Assessment:



Income and Sources:

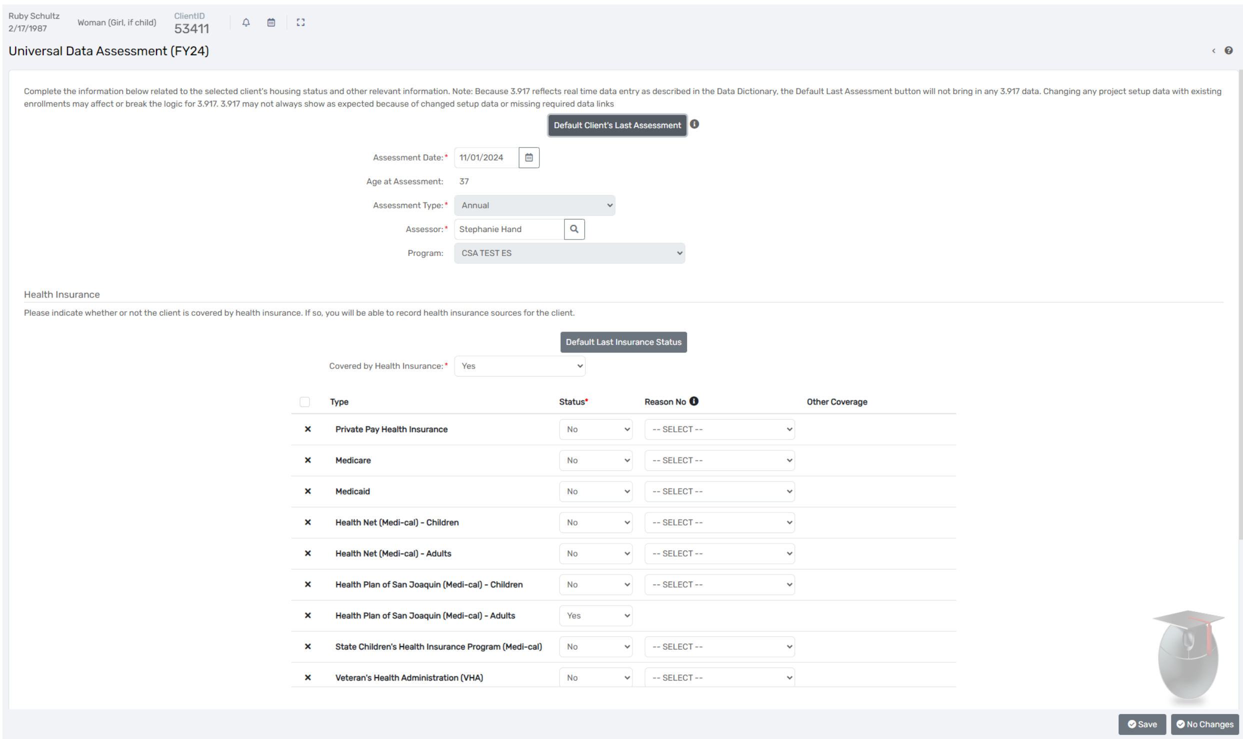


Save and Close and select Finish to complete the assessment. **Note:** You must complete assessments for the entire household and complete the workflow to save the information.

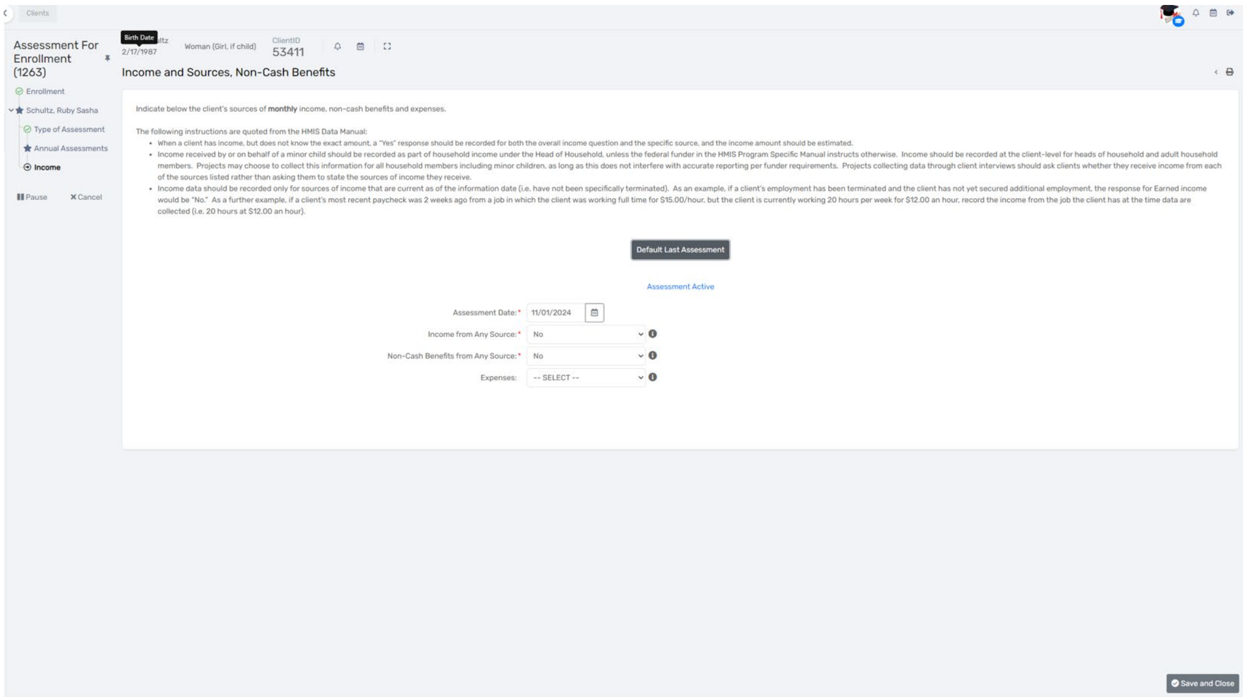
Annual Assessment

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:

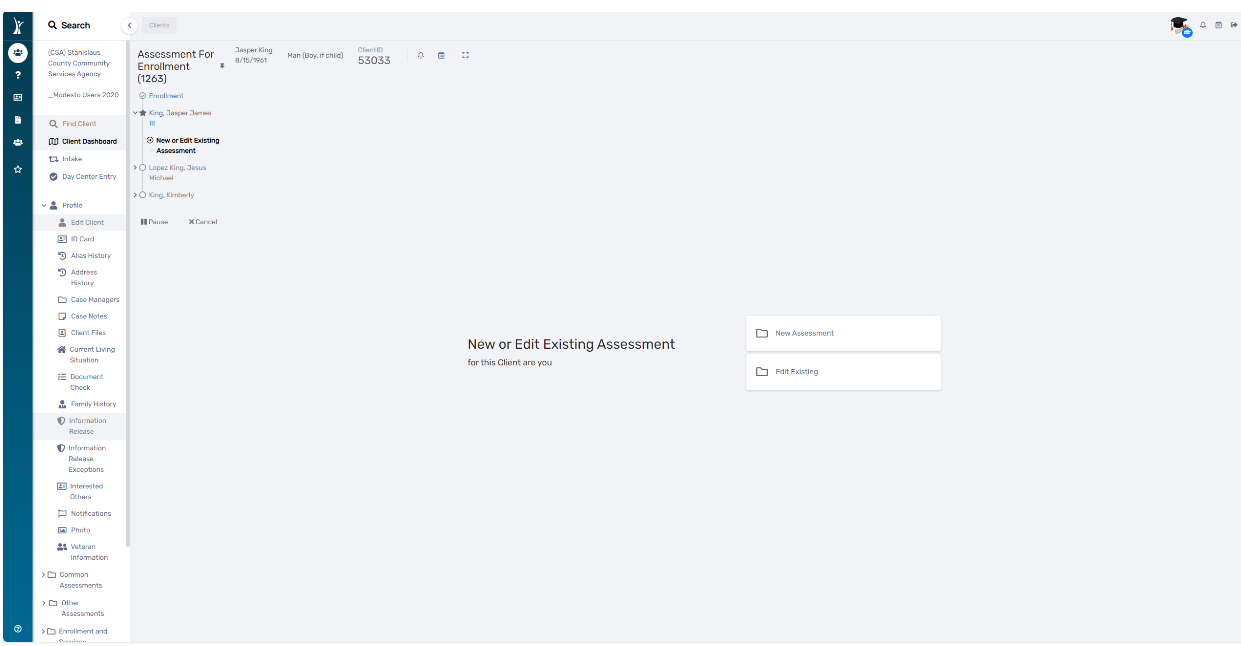


Income and Sources:

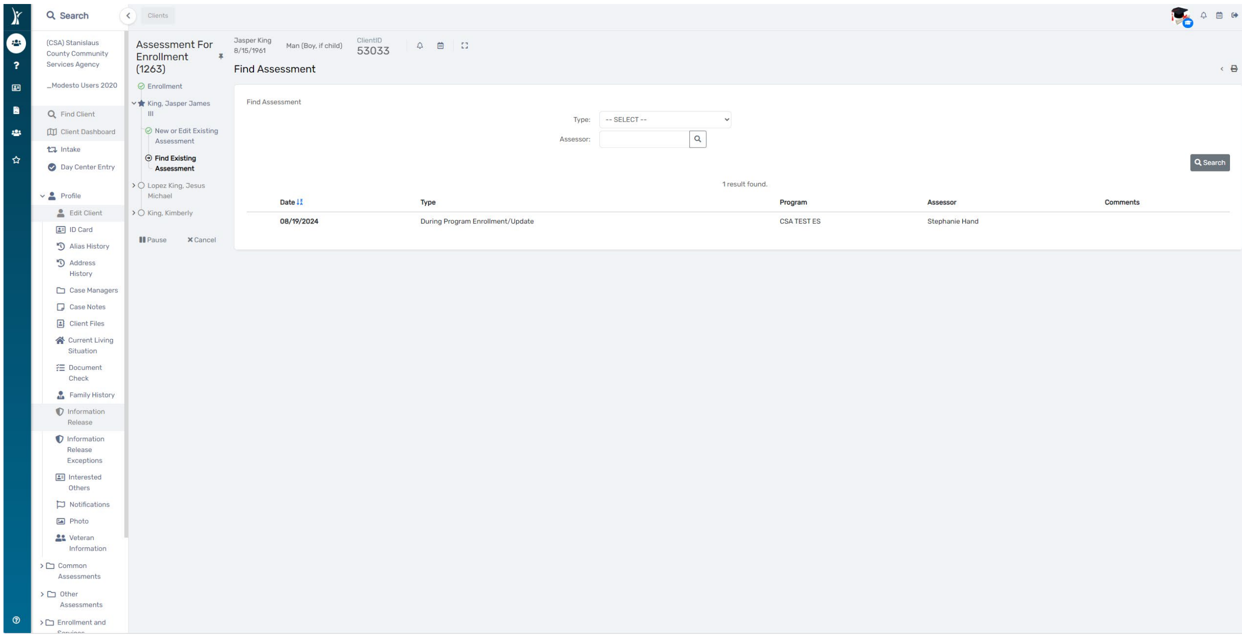


Updating Existing Assessment

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.



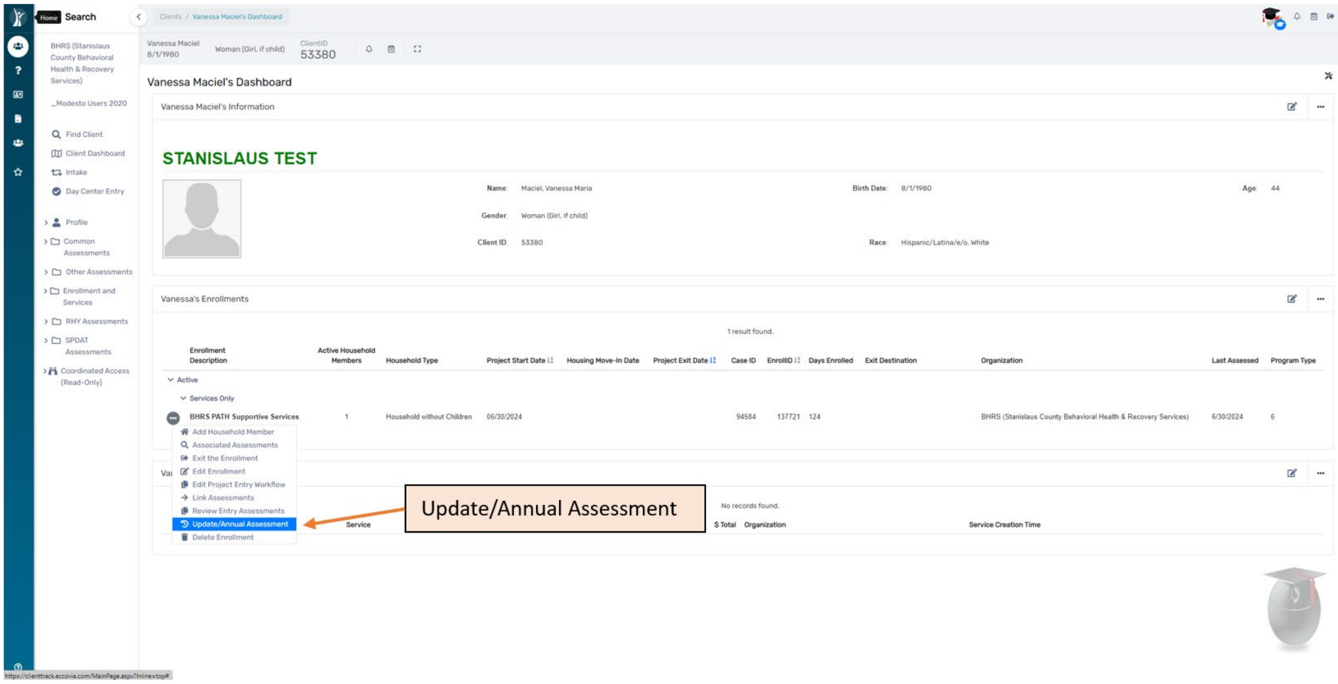
To edit an existing assessment, you will be asked to select the appropriate assessment you wish to edit. Select the assessment.



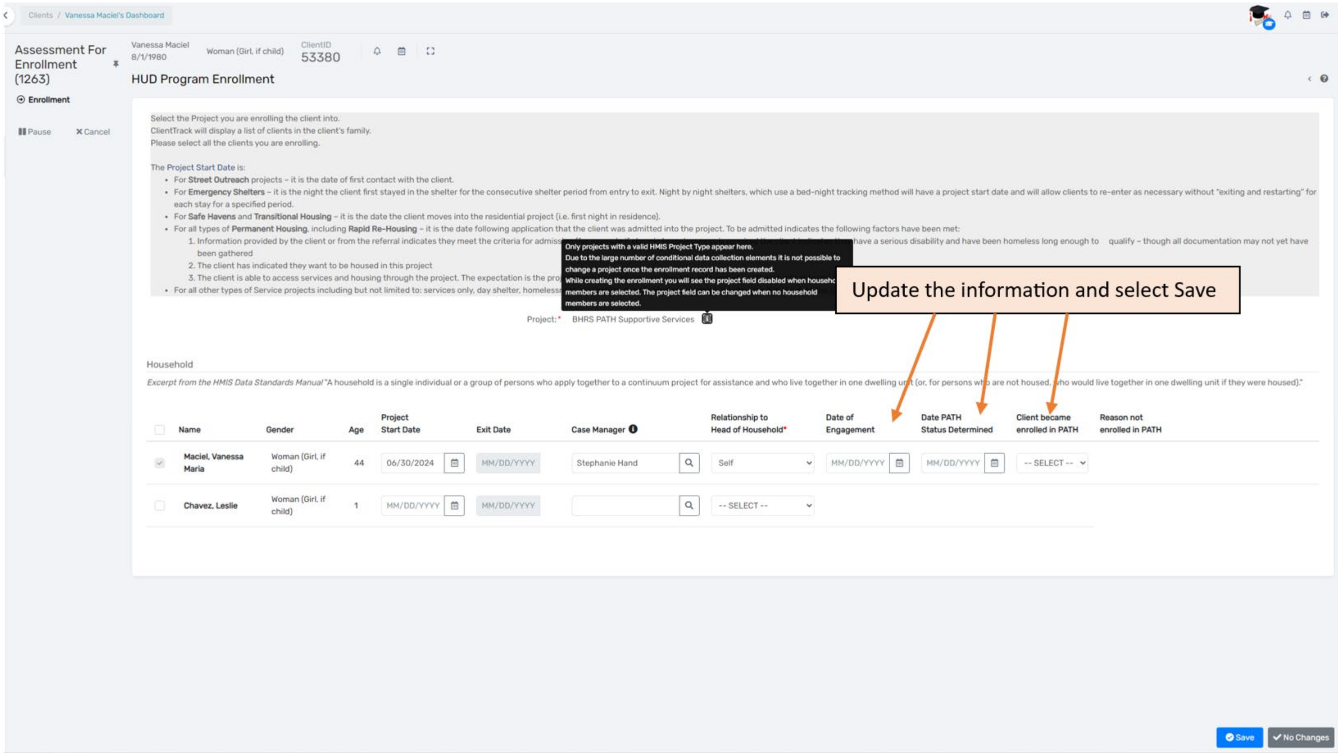
You will go through the entire workflow to make the necessary change. Make sure you complete the entire workflow or this may cause data quality issues.

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.



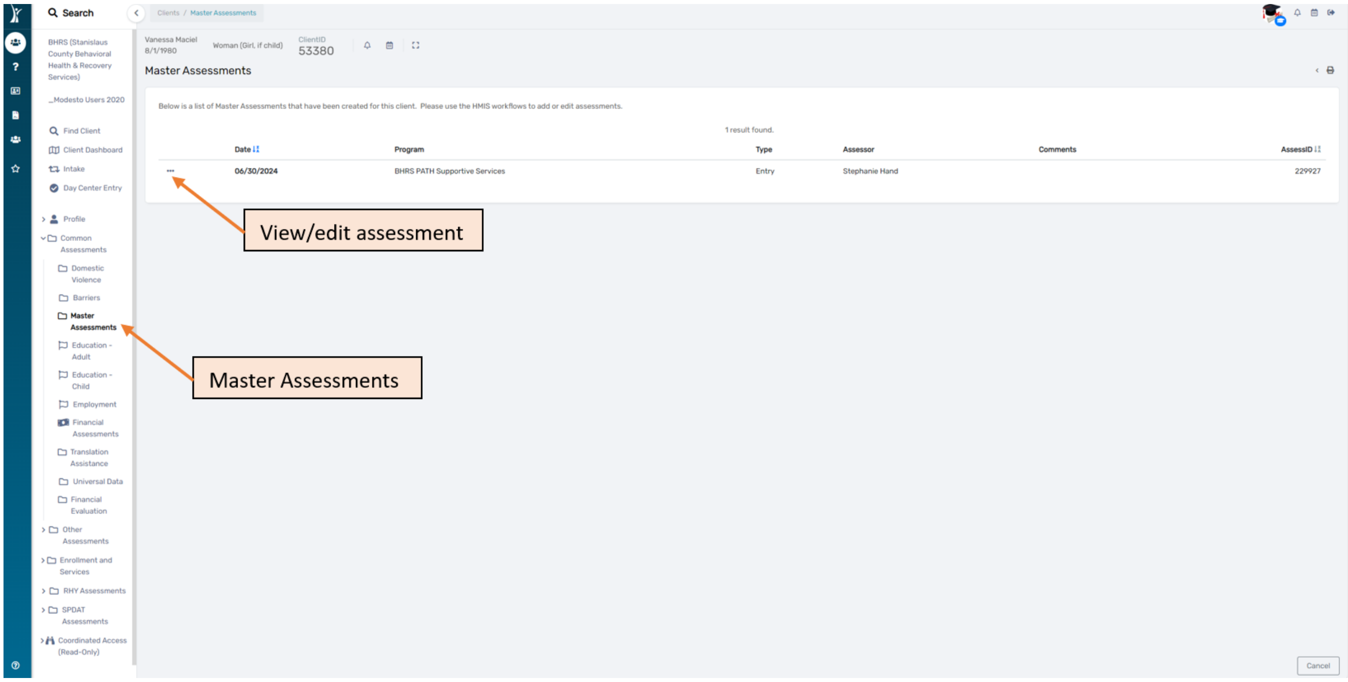
On the Enrollment screen, you make any changes to the Date of Engagement, Date PATH Status Determined, and/or Client became enrolled in PATH. You will then continue through the entire workflow. **Note:** Do not change the Project Start Date.



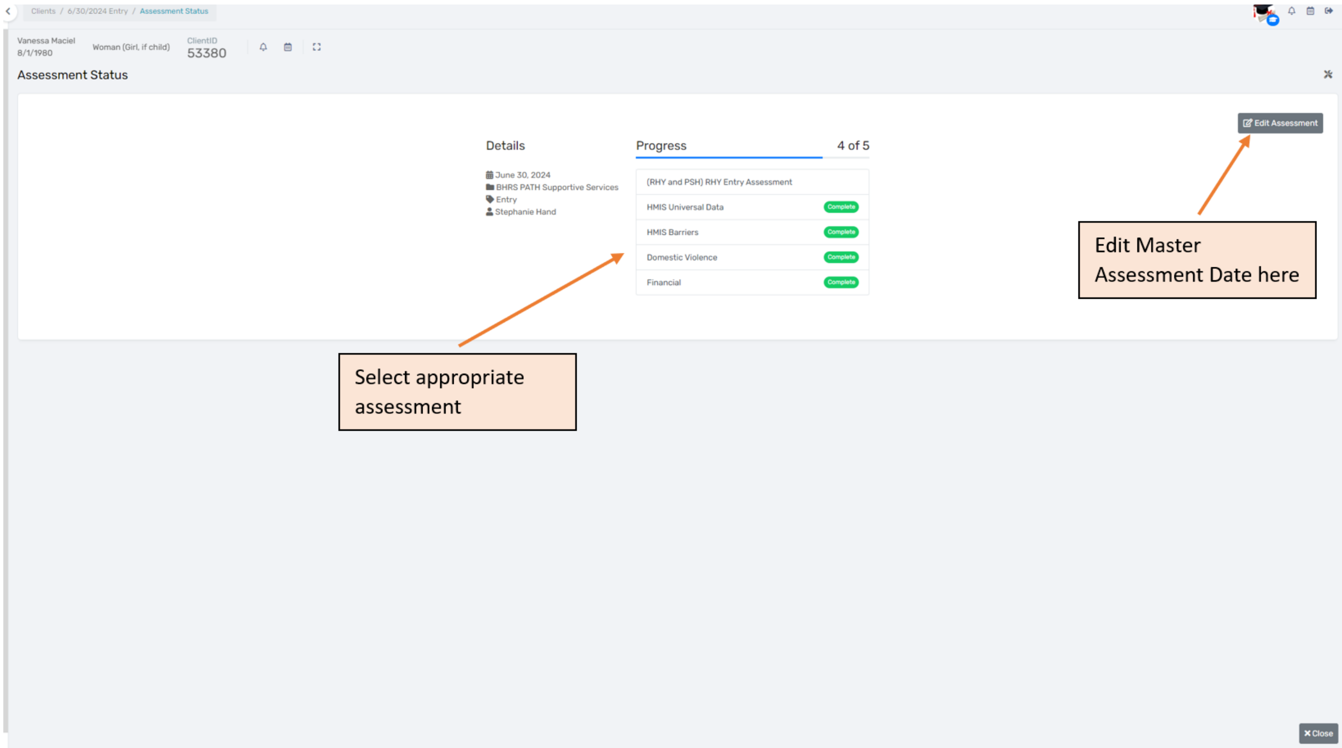
View and Edit Master Assessment

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.

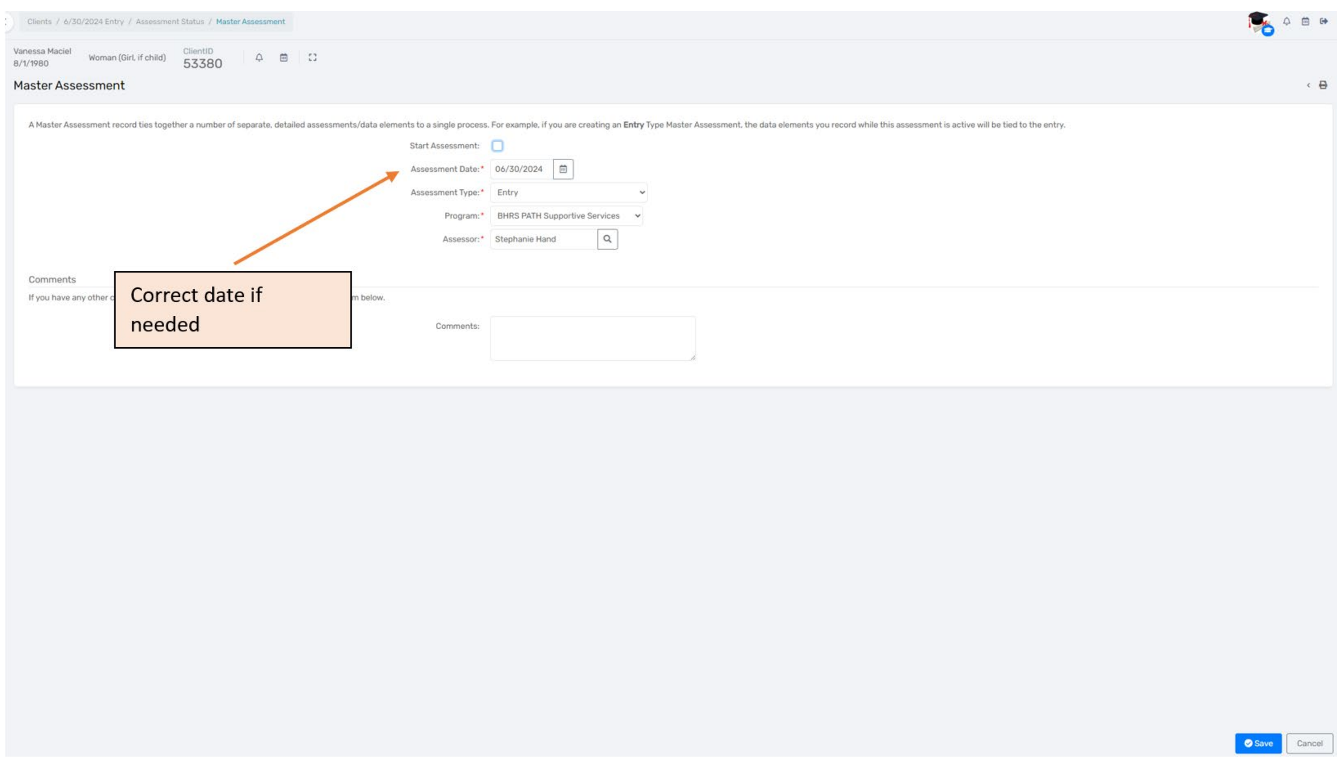
Start on the client's dashboard and select Common Assessments from the left-hand side of the screen. Then select Master Assessments. View and edit any recorded Master Assessments from this screen.



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.

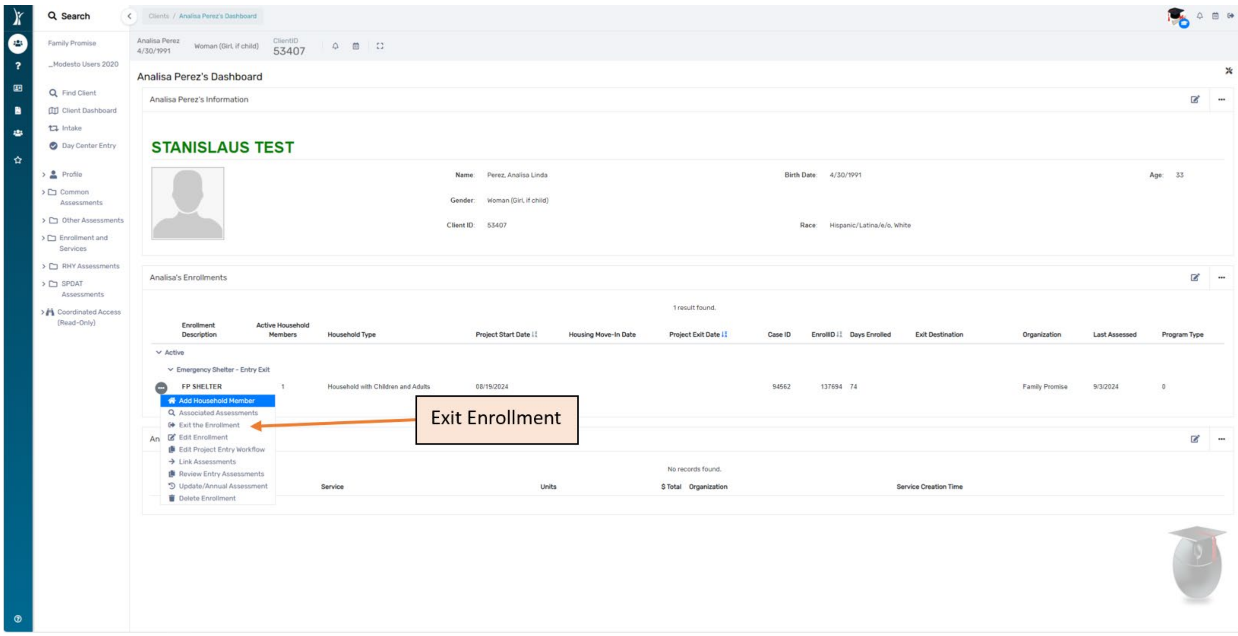


Edit Master Assessment dates to clear Data Quality date errors.

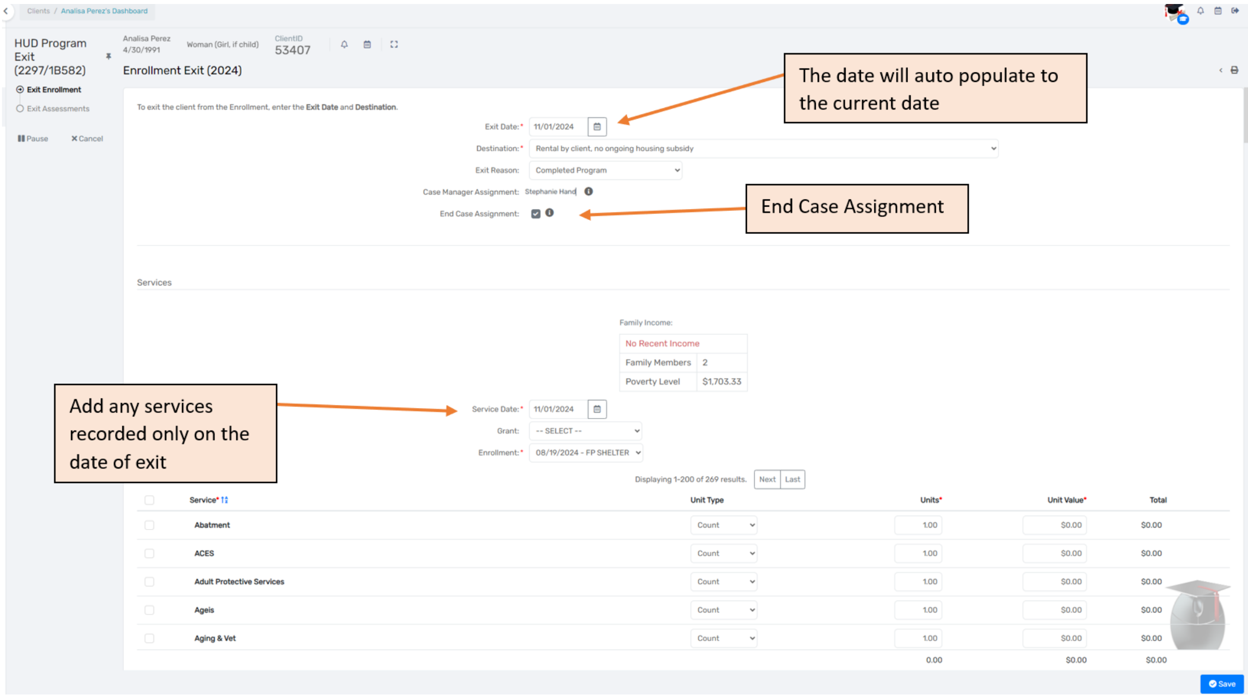


Exit Enrollments

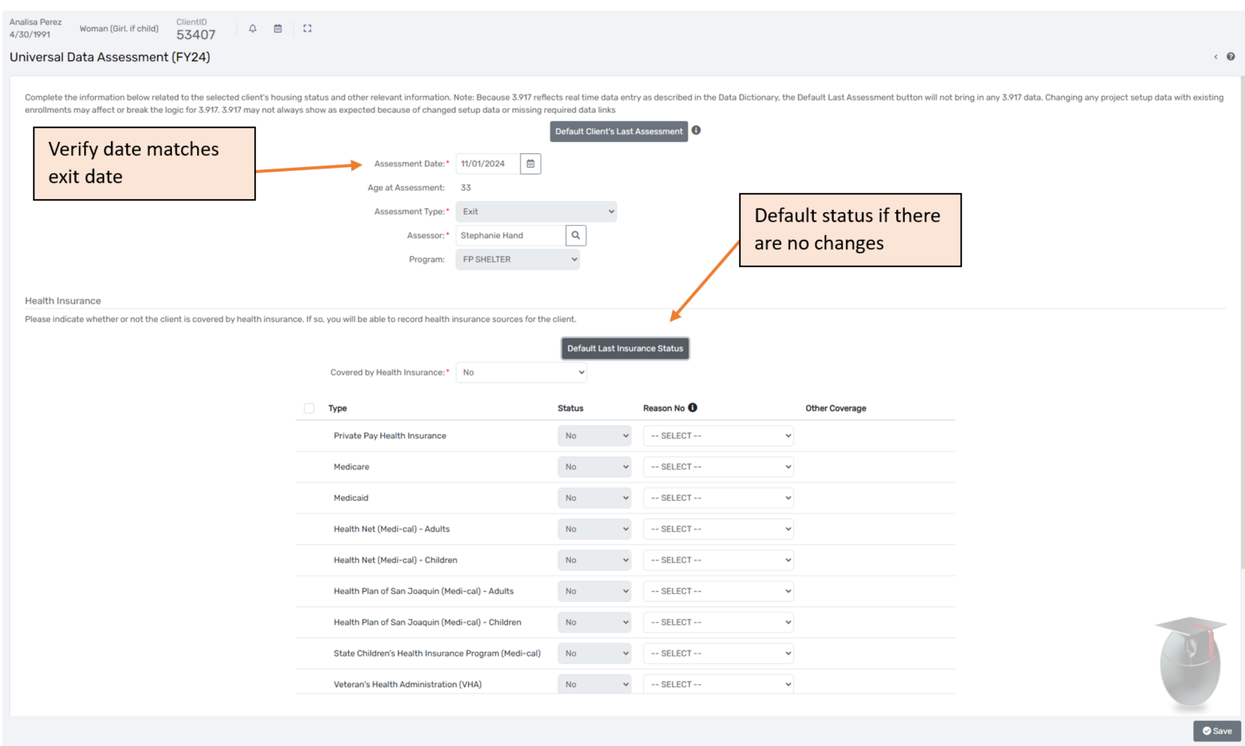
When a client has transitioned from your project or is no longer receiving services for any reason, you will exit the client form your project in ClientTrack If you are exiting an entire household, start from the head of household client's Dashboard. If you are only exiting one member from the enrollment, 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.



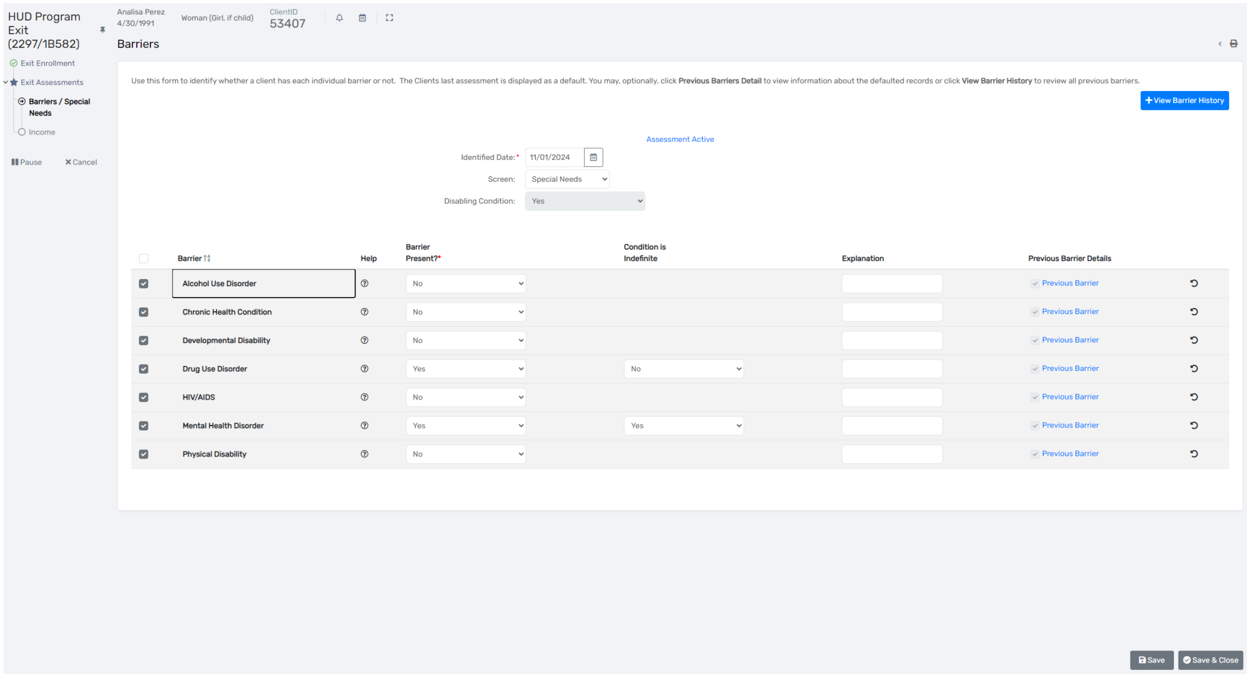
Enter the Exit Date, Destination, and End Case Assignment. End Case Assignment will remove the client from your Active Case Assignments located on the User Dashboard. An Exit Reason can be completed, however, it not a required field.



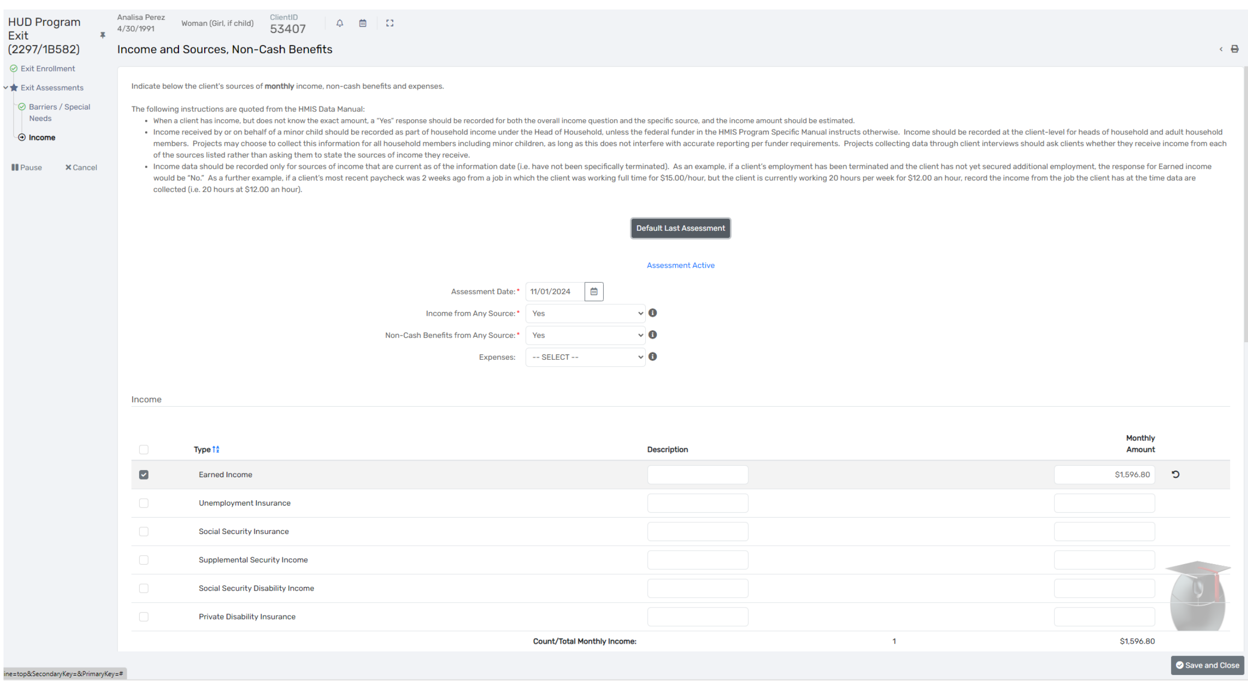
Check the Assessment Date and ensure it matches your exit date. You may Default the Last Insurance Status if there are no changes.



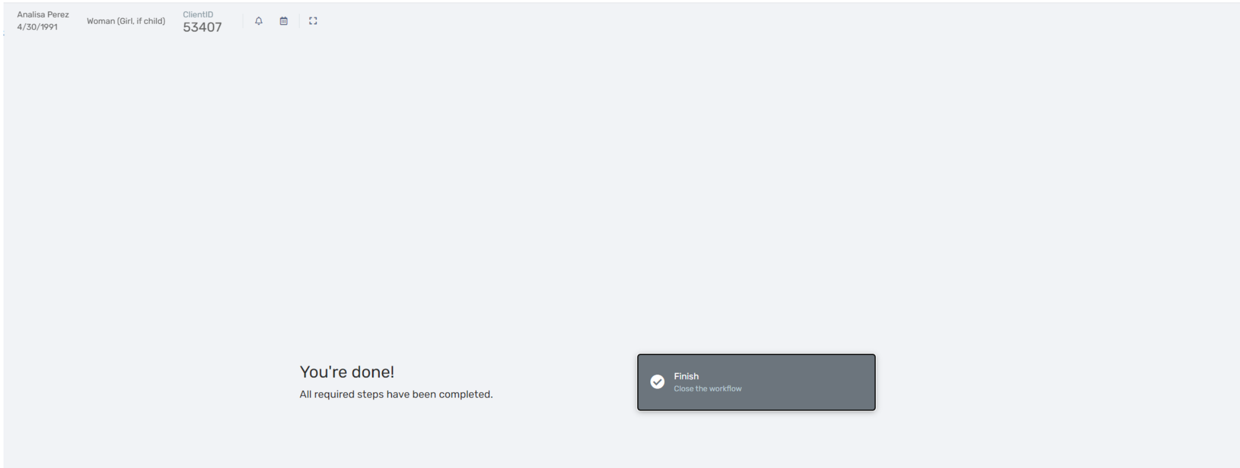
The Barrier Assessment is defaulted from the last assessment. Verify the information for accuracy or changes before continuing.



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



Select Finish to complete your workflow and exit the client.



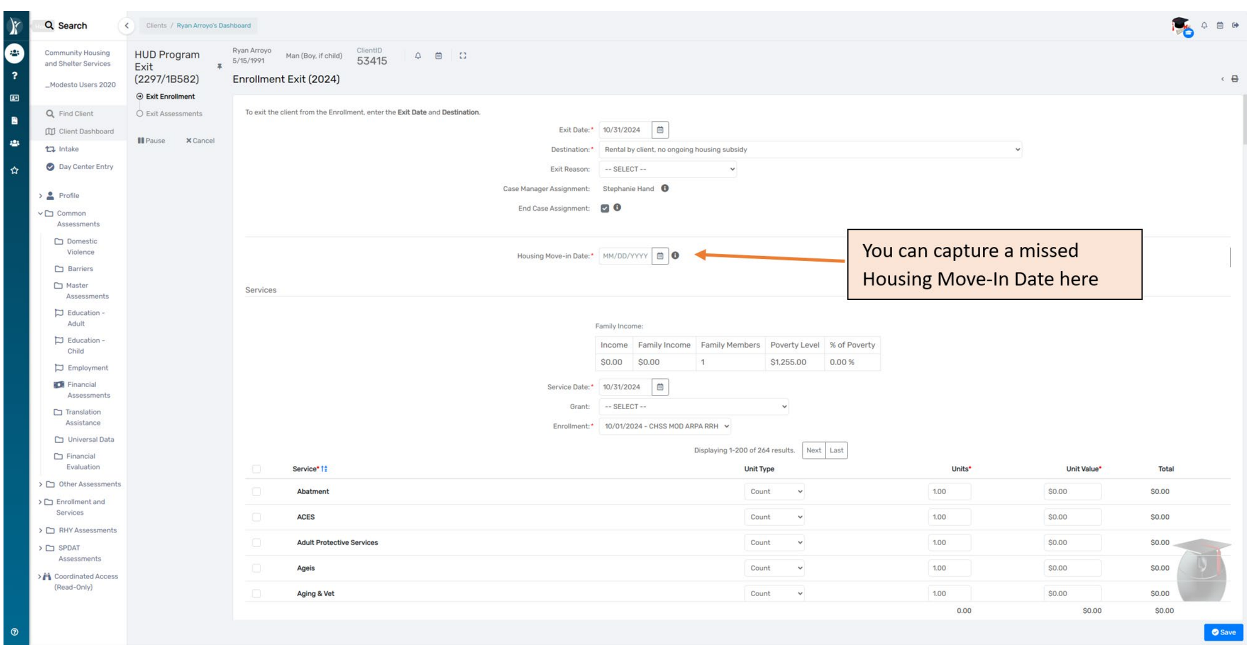
Unique Project Requirements at Exit

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

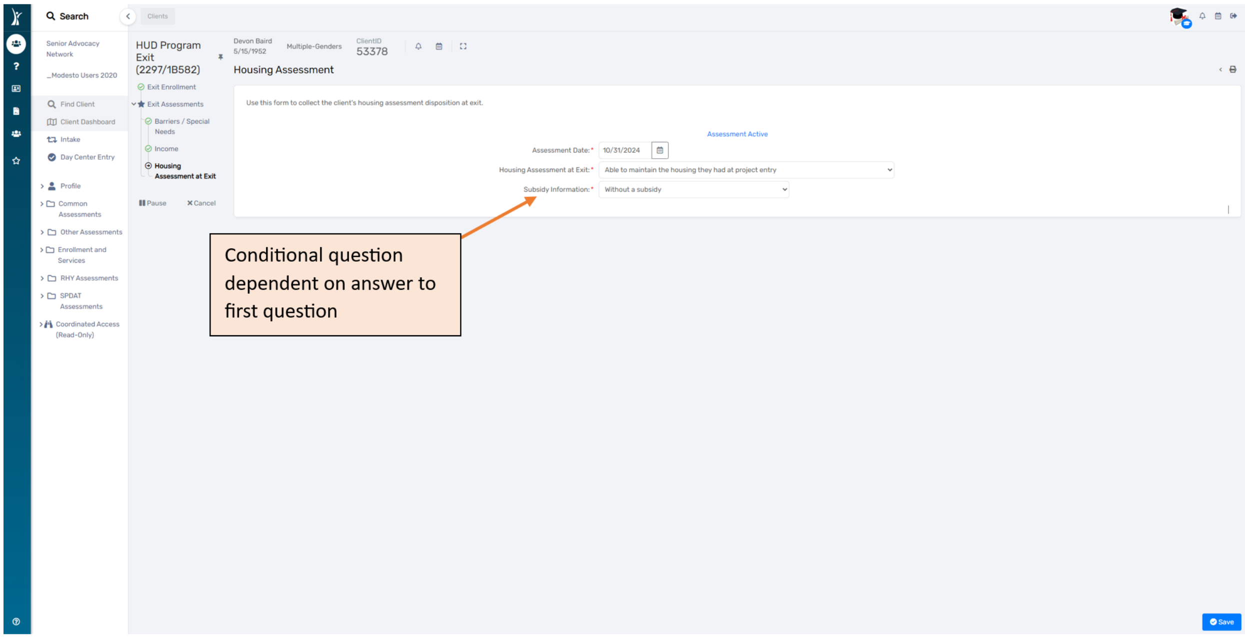
Rapid Re-Housing Exit (RRH)

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



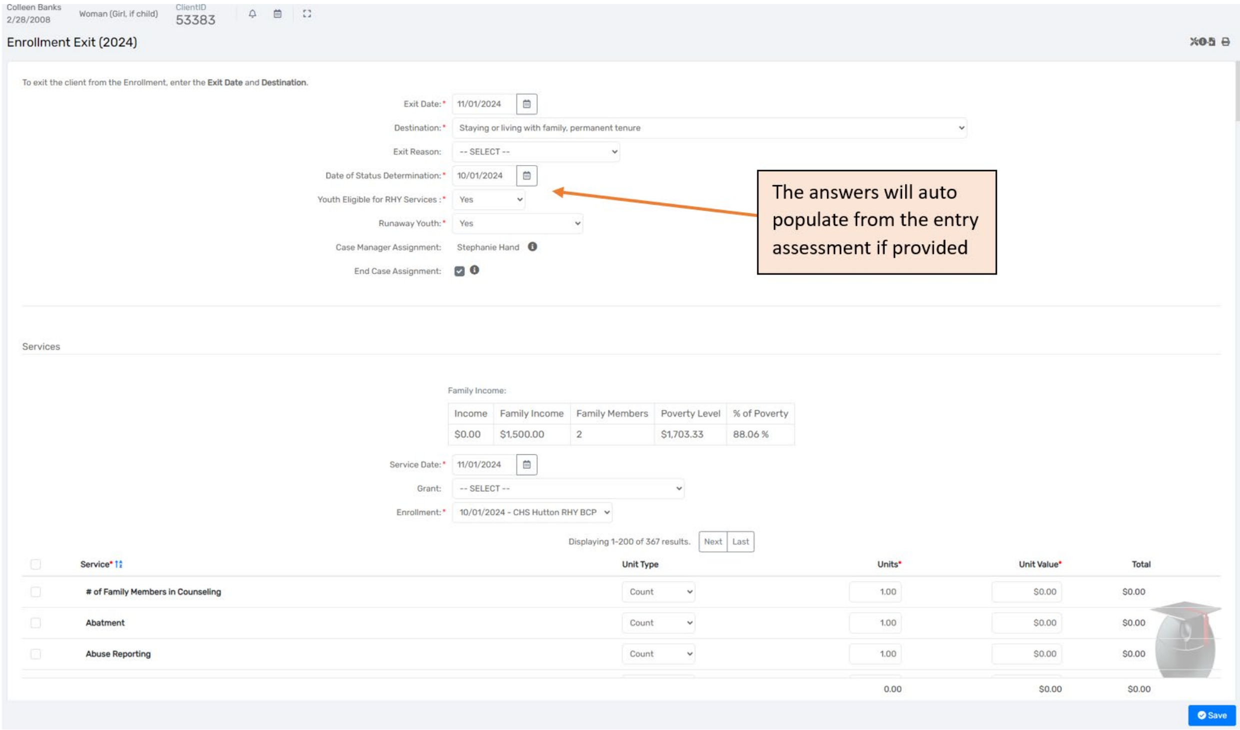
Homeless Prevention (HP)

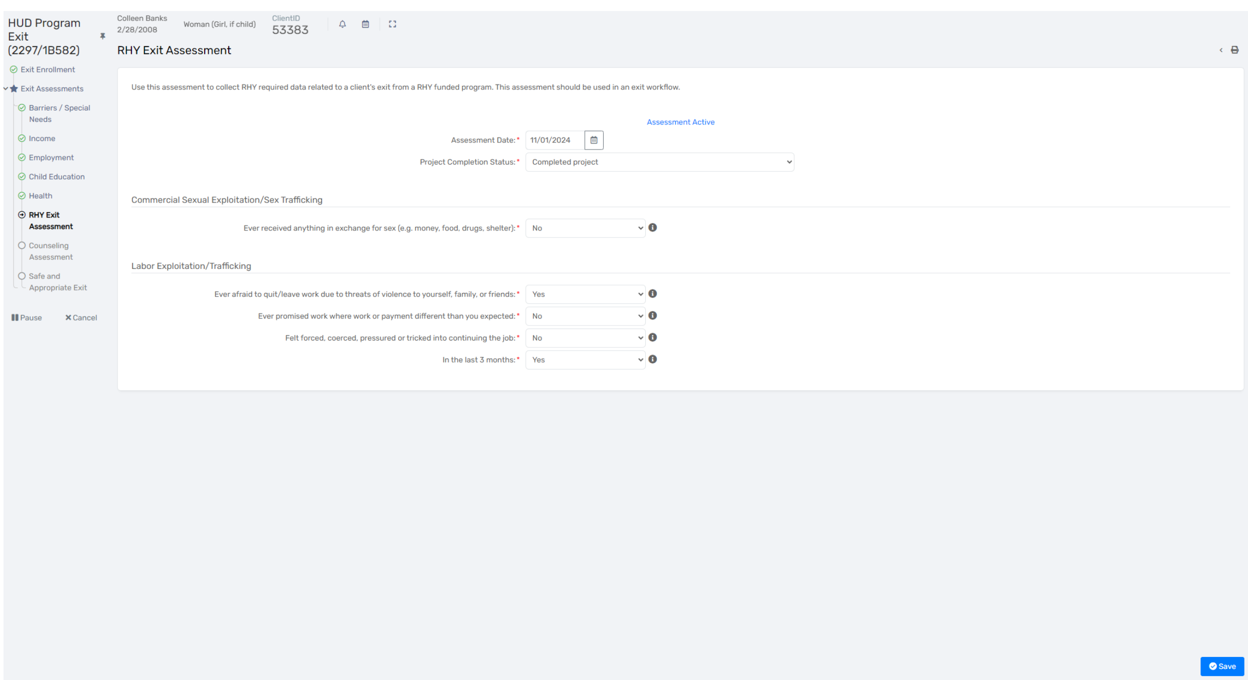
Homeless Prevention projects will have all Universal Exit questions, in addition to the Housing Assessment at Exit Assessment.



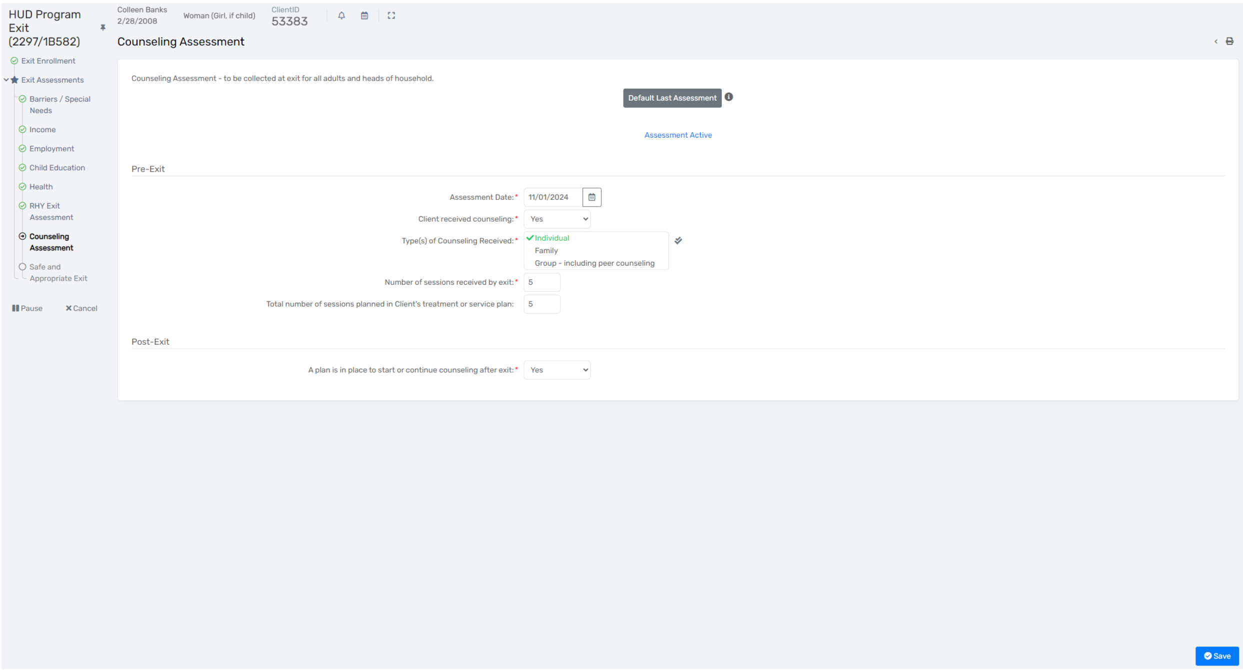
Runaway Homeless Youth (RHY) Exit

RHY Exit Assessment

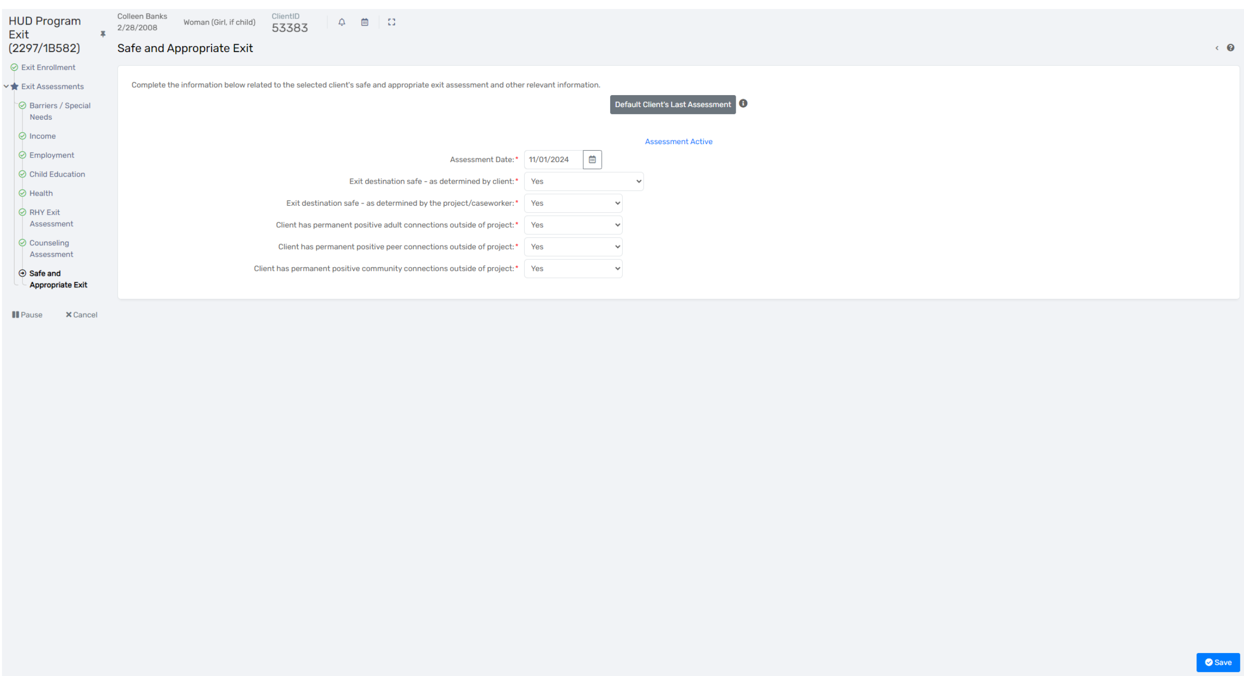




RHY Counseling Assessment



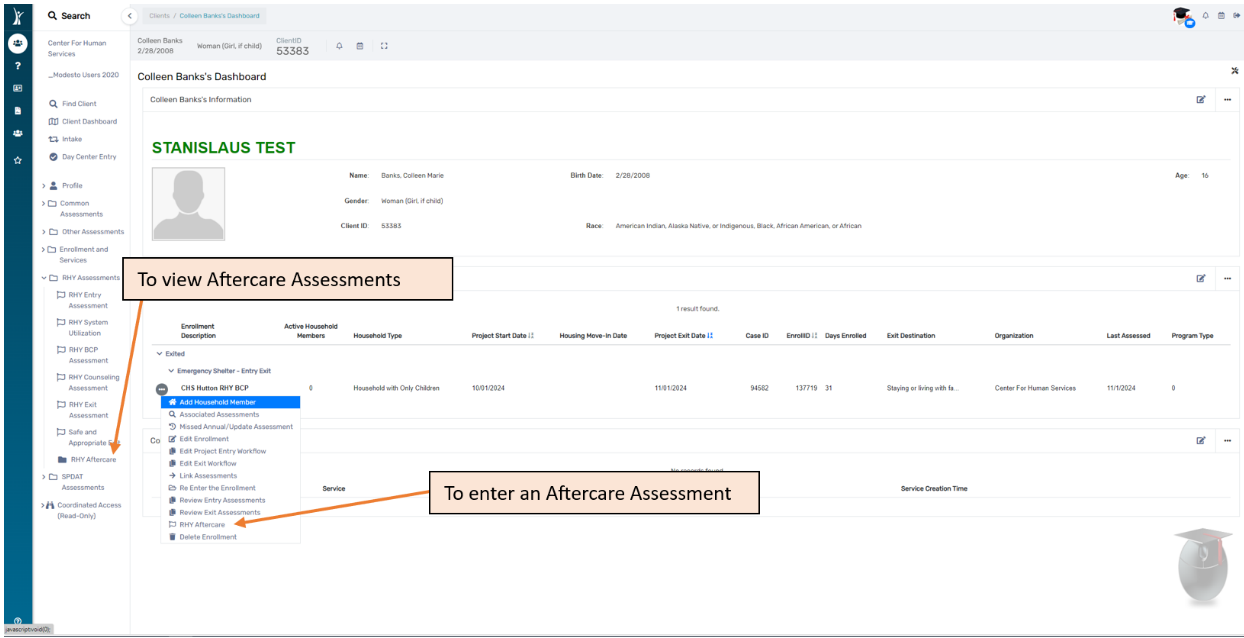
RHY Safe and Appropriate Exit



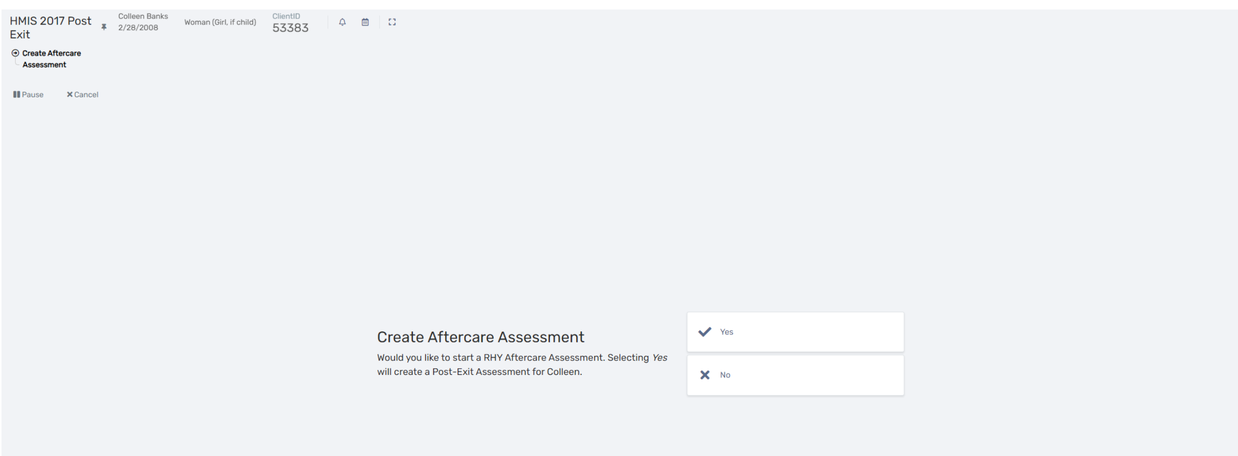
RHY Aftercare

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.

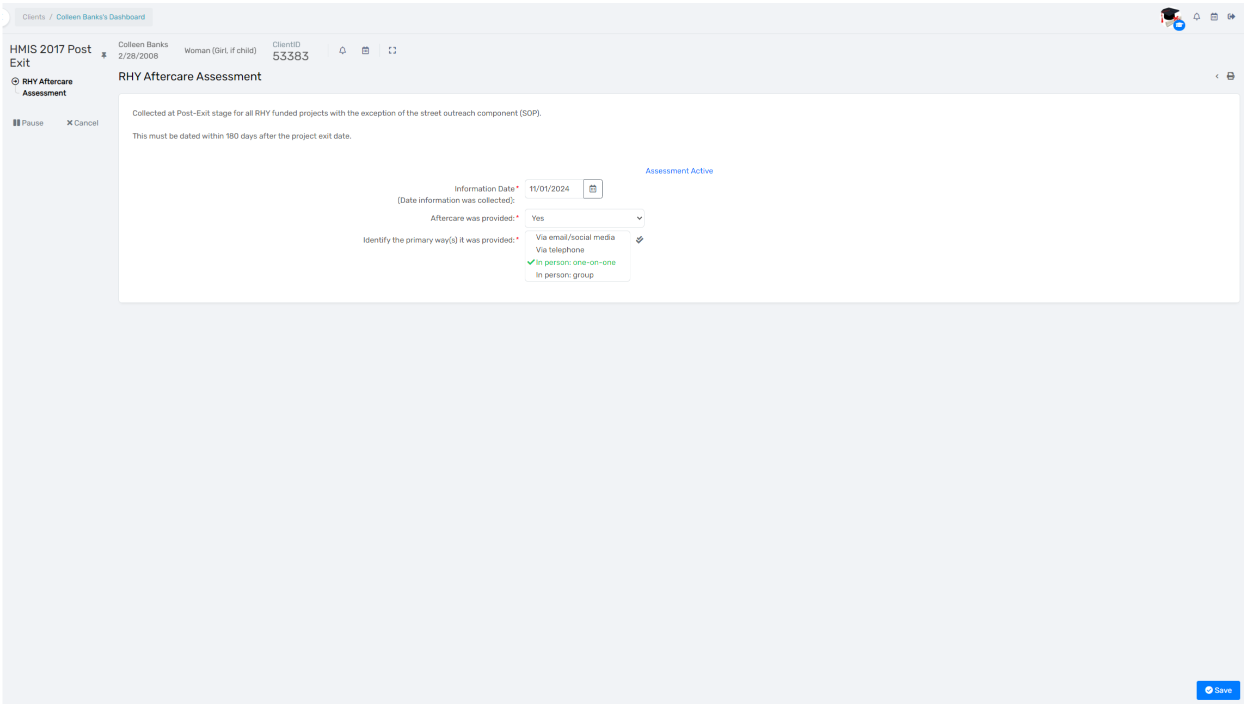
To enter an Aftercare Assessment, go the enrollment action button and select RHY Aftercare. To view any Aftercare Assessments, go to the Client Dashboard, select the RHY Assessments folder on the left-hand side of the screen, and then select RHY Aftercare.



Create Aftercare Assessment

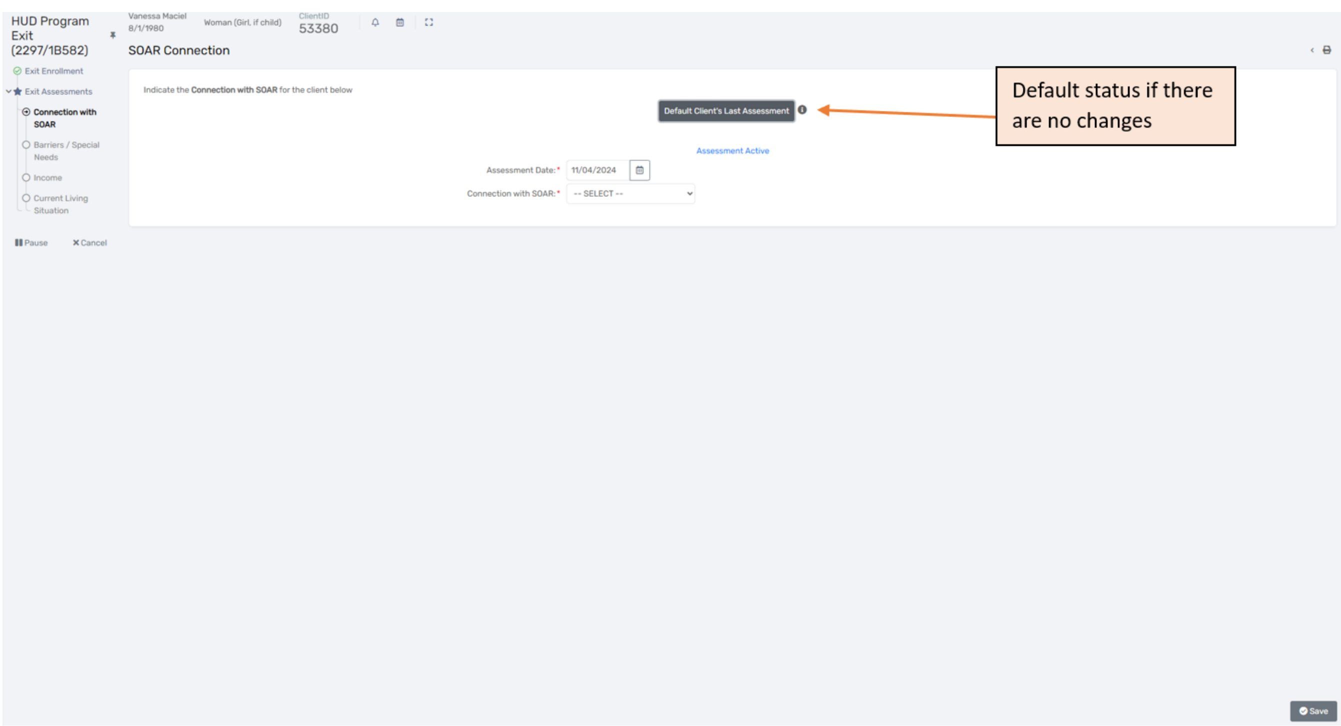


RHY Aftercare Assessment

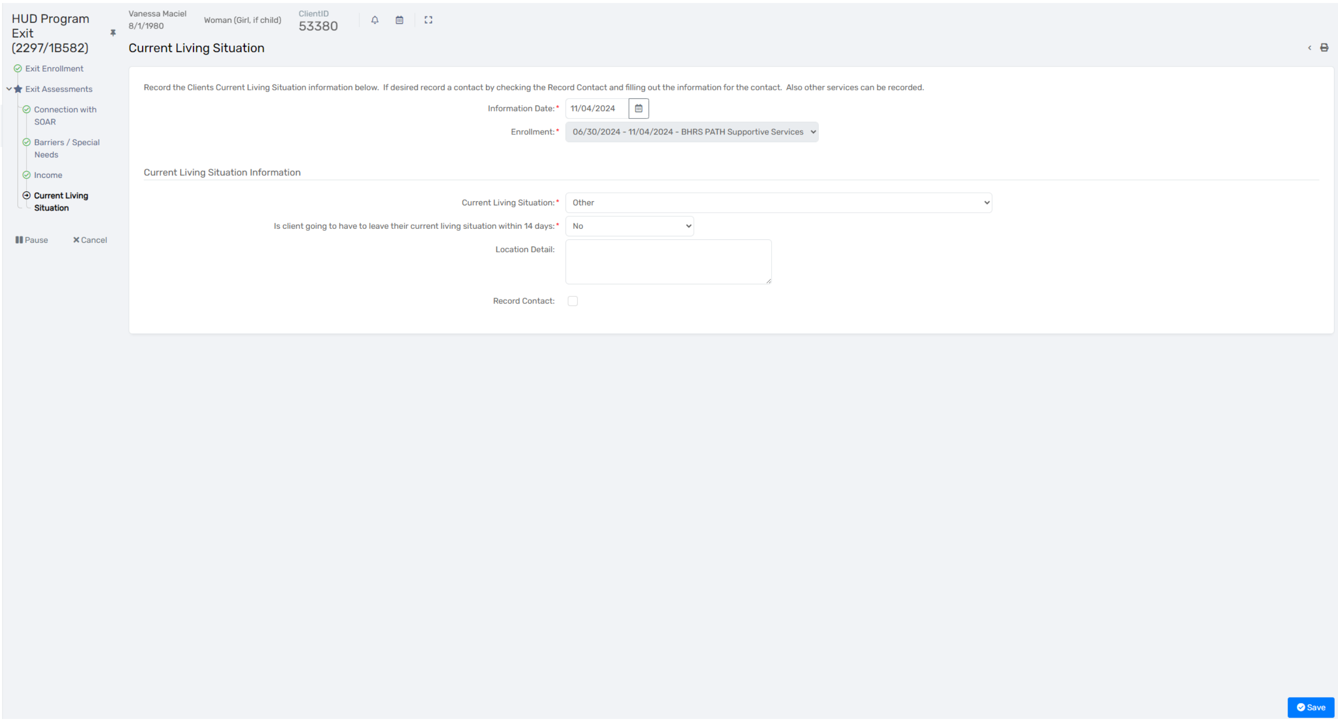


Projects for Assistance in Transition from Homelessness (PATH) Exit

SOAR Connection

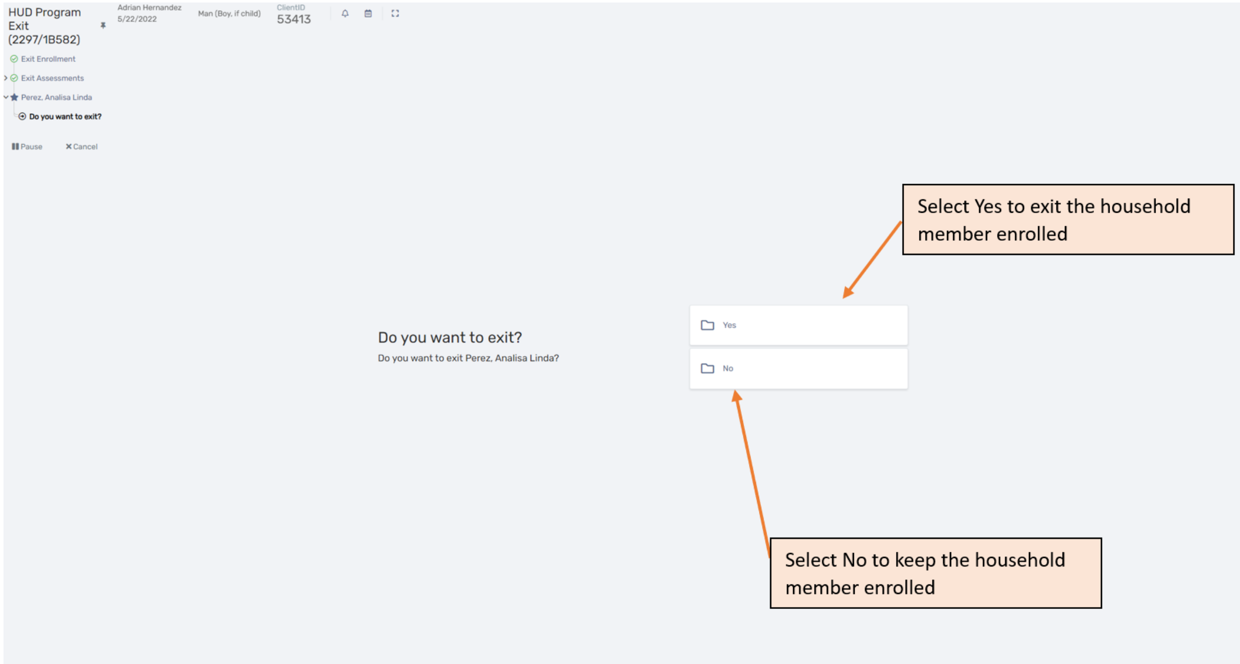


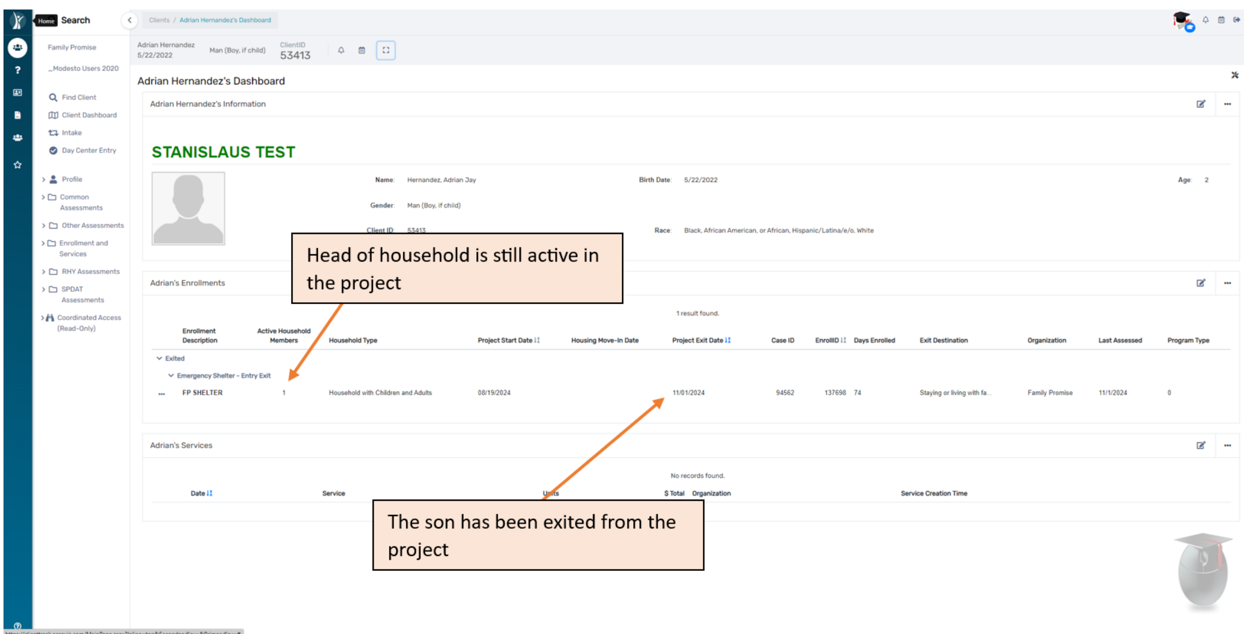
Current Living Situation



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. Exit the Enrollment as normal. Once you complete the workflow, the system will ask you if you wish to exit the additional household member from the enrollment.



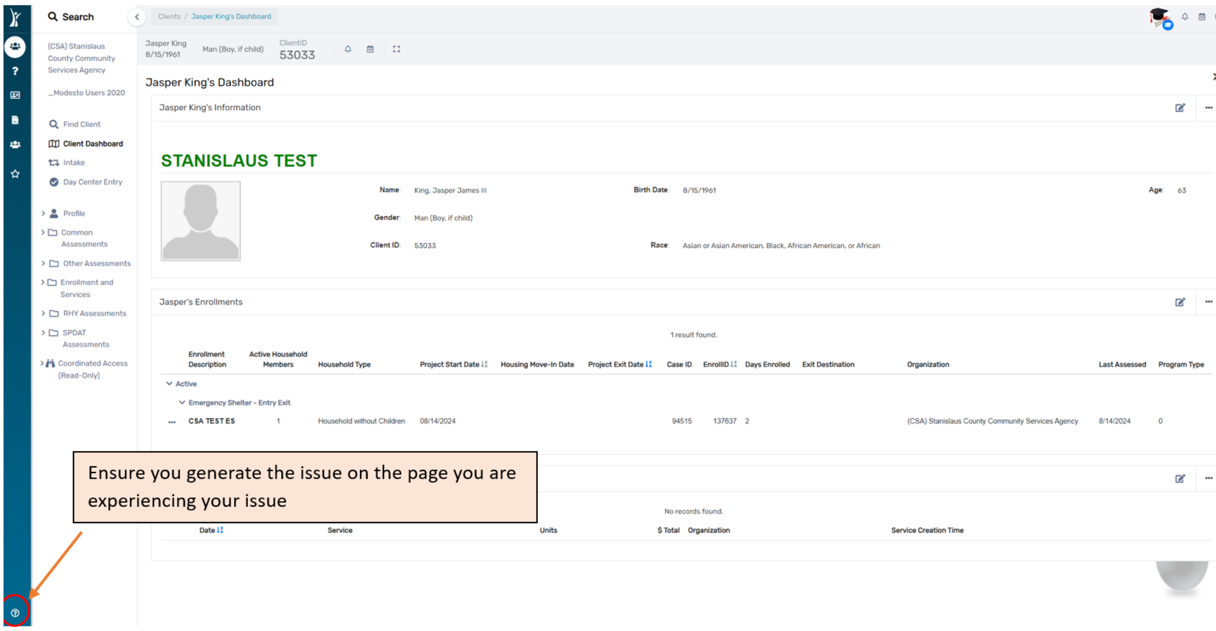


Submit Support Issues Internally Through ClientTrack

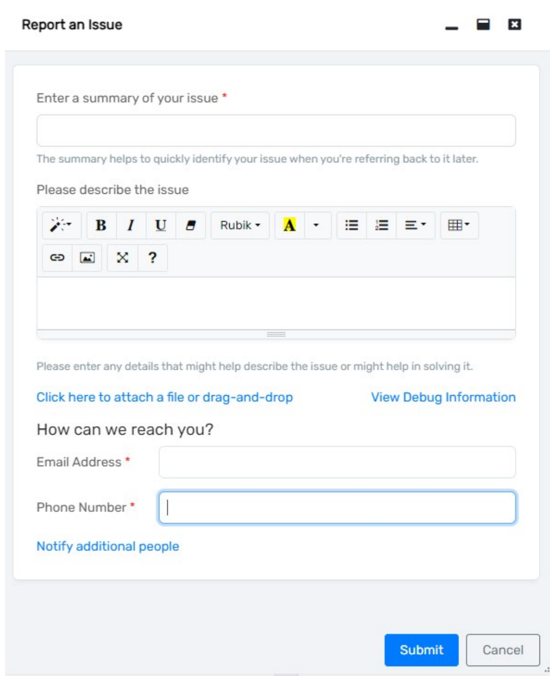
Report Issues

If you are experiencing difficulties logging into HMIS, please email HMIS@stancounty.com.

If you are experiencing difficulties while in HMIS, please submit an issue ticket in ClientTrack.

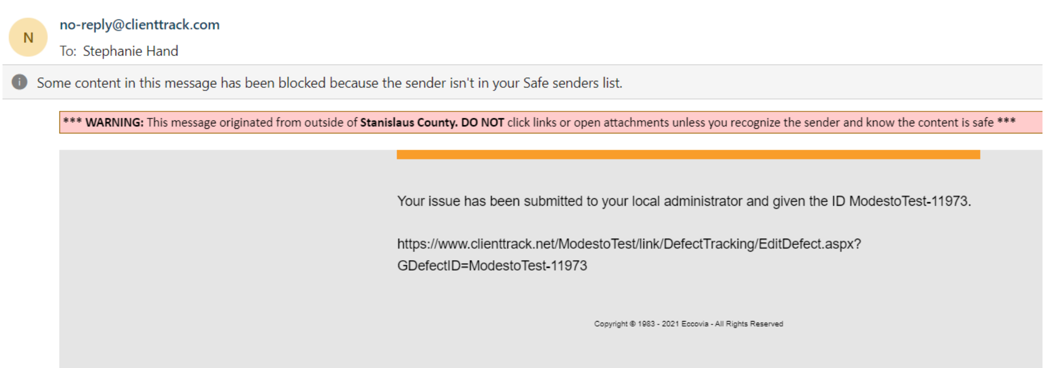


Select Report an Issue and complete the form with your issue information. You can also attach a file or screenshot to the issue ticket to help provide context. Enter Subject/Summary and add the specifics of your reason for contacting the HMIS Support in the body of the issue statement. Please be very 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.



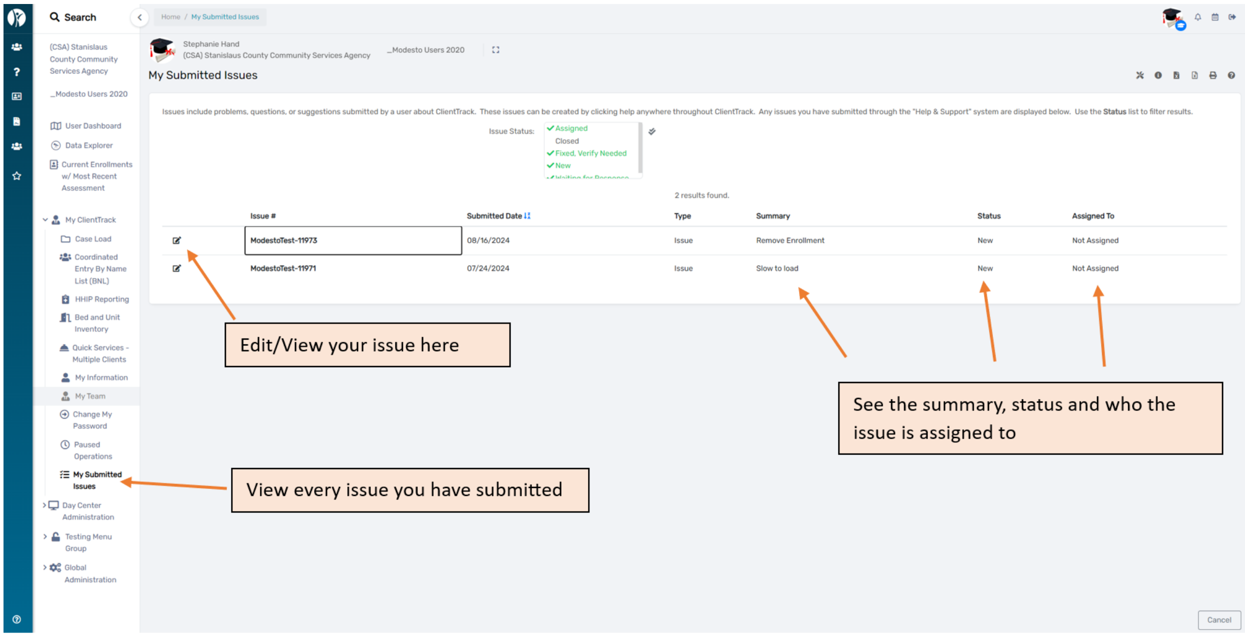
DO NOT send client full names, dates of birth or social security numbers via email or to the HMIS Support. Identify clients using their unique ClientID.

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

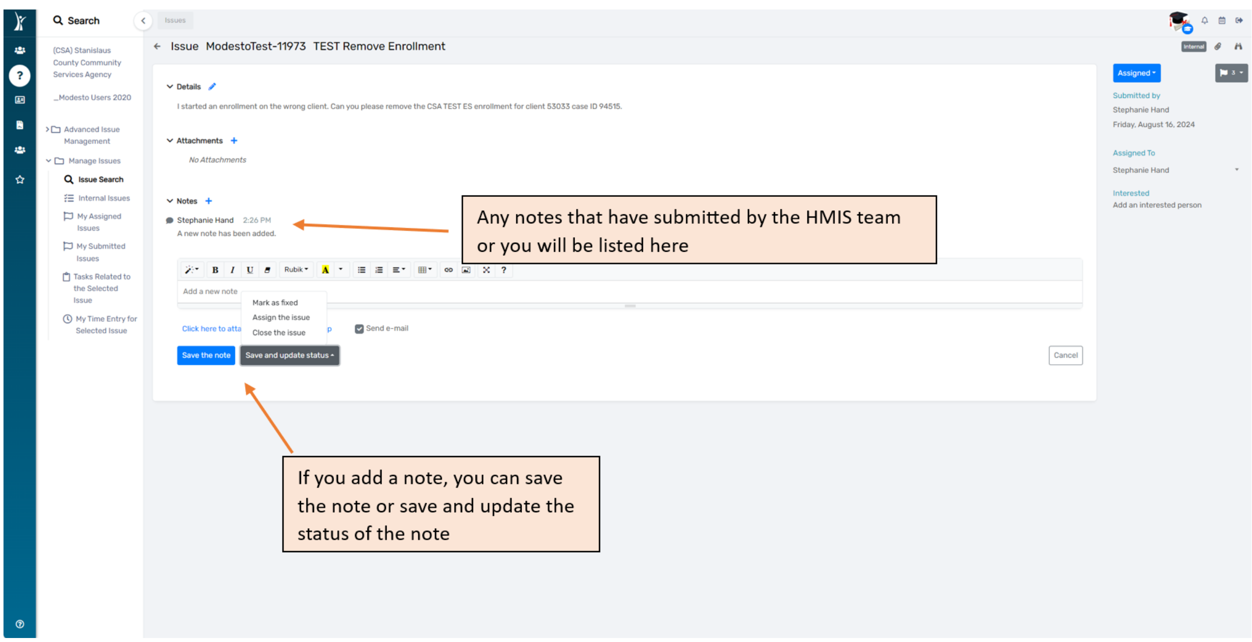


View and Respond to Issues

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.

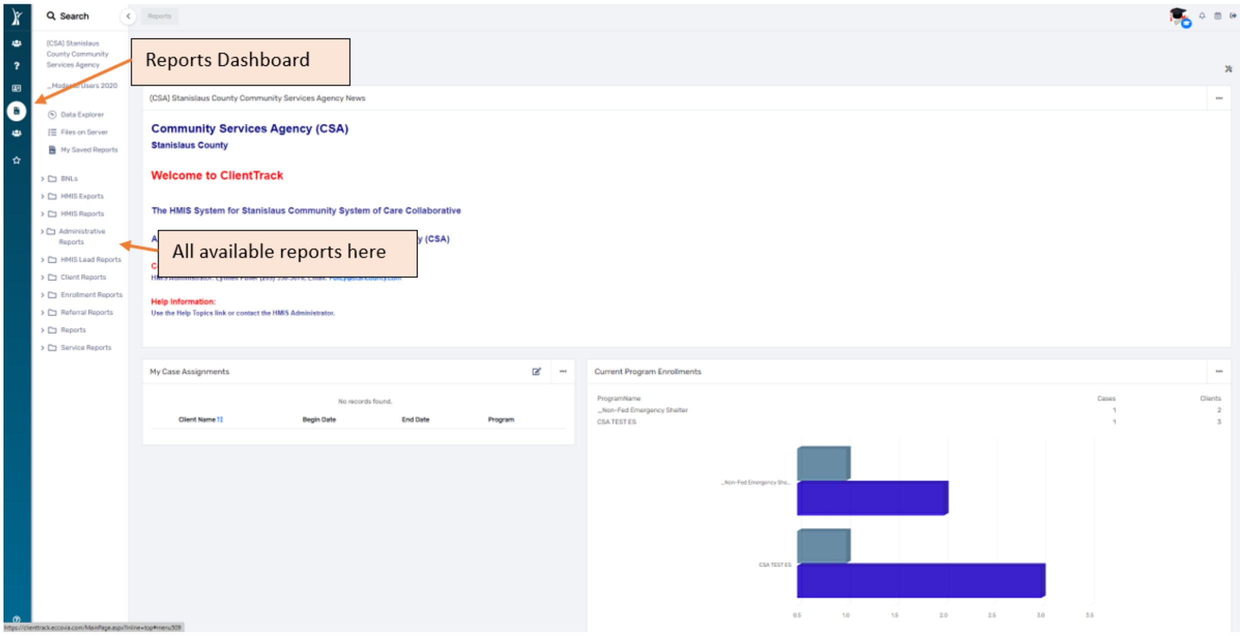


Once you open your submitted issue, you can view or add another note or mark that the issue has been fixed. You can only mark the issue as fixed if you have verified on your end. Please make sure you are reviewing your submitted issues regularly.



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.



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

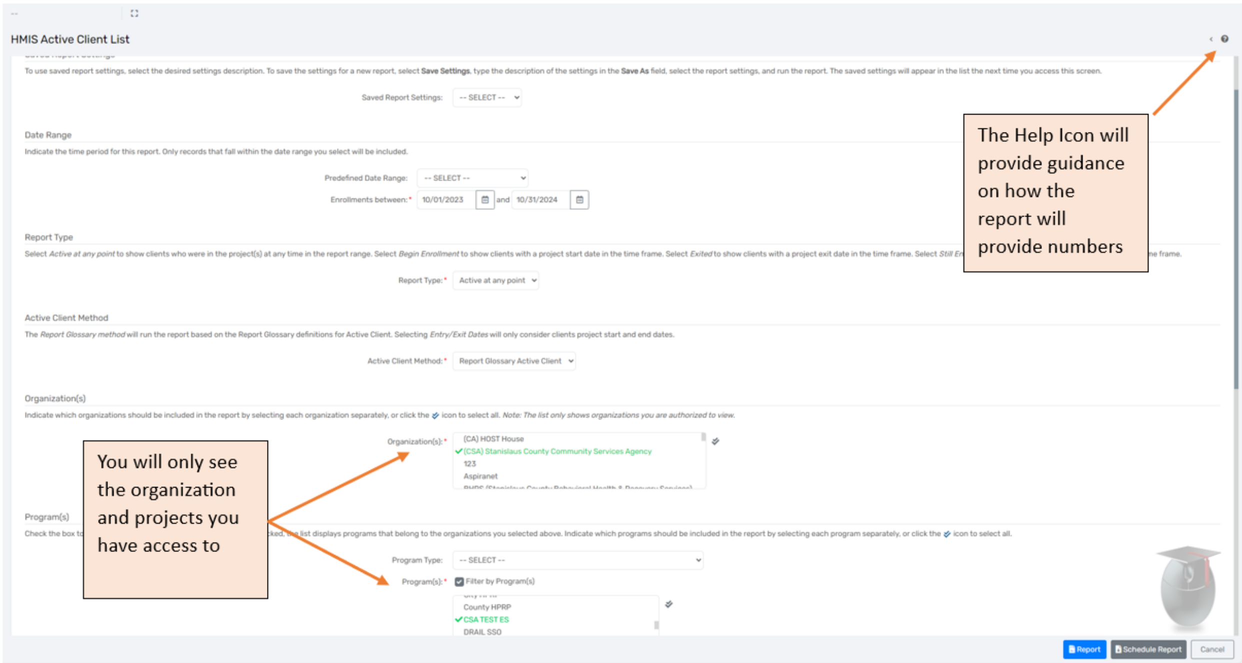
Referral Reports: Referrals to Providers, Referrals from Providers

Service Reports: Service Summary, Frequently Served Clients

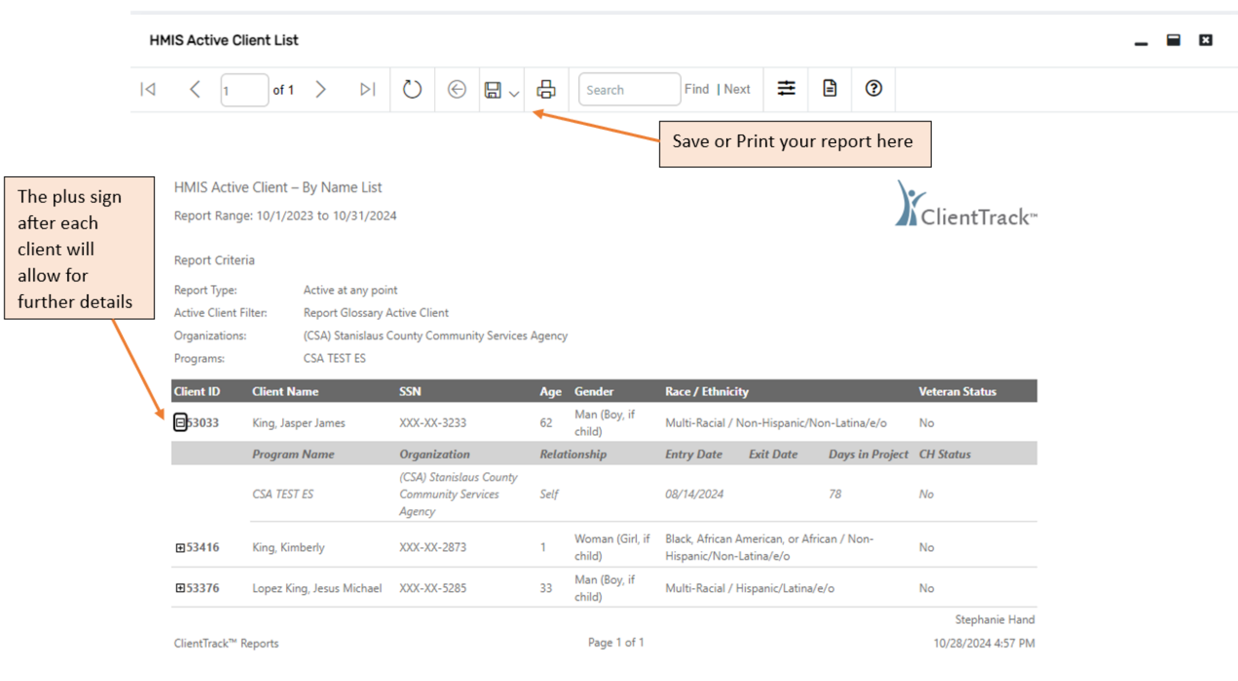
HMIS Reports

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.

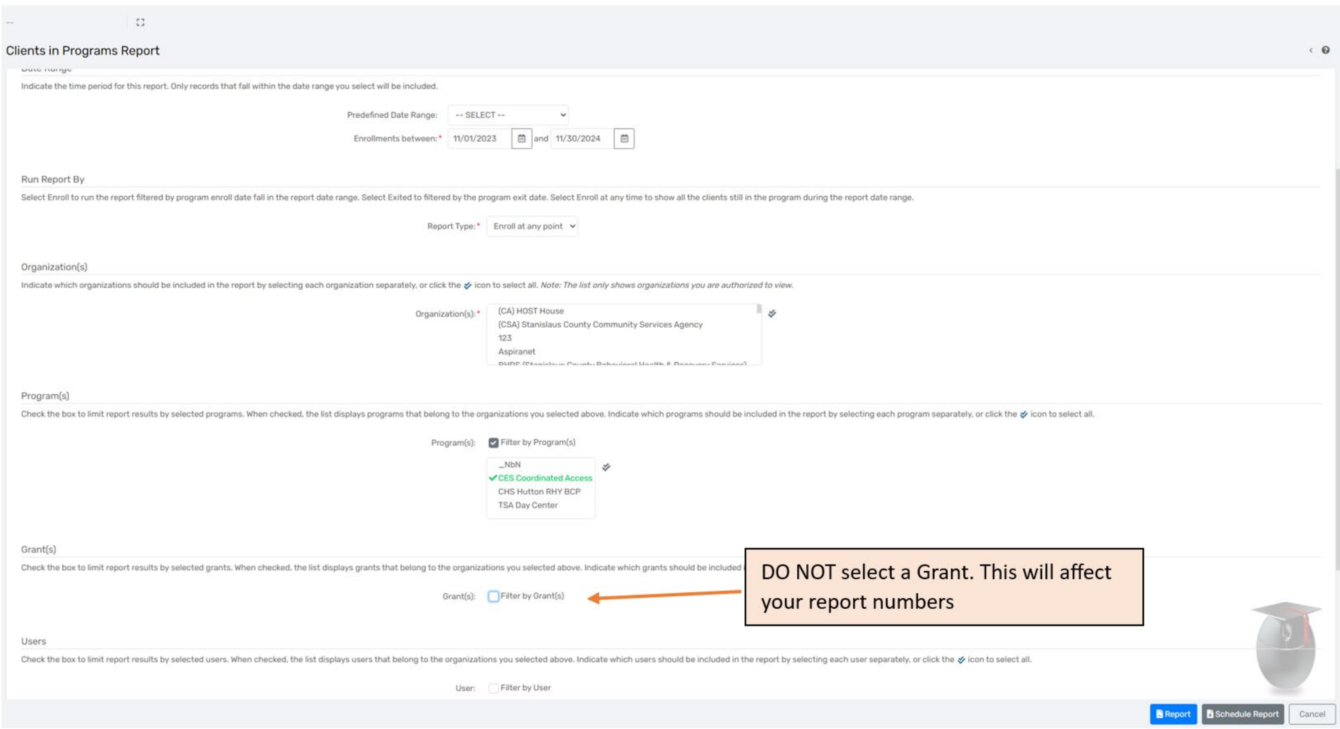


Once the report has been completed, you will see the clients in that program during the requested time range. Selecting the plus sign next to each client will allow you to view more information about the enrollment. You may also save this document as Excel, Excel Data, PDF, or Word document or print.

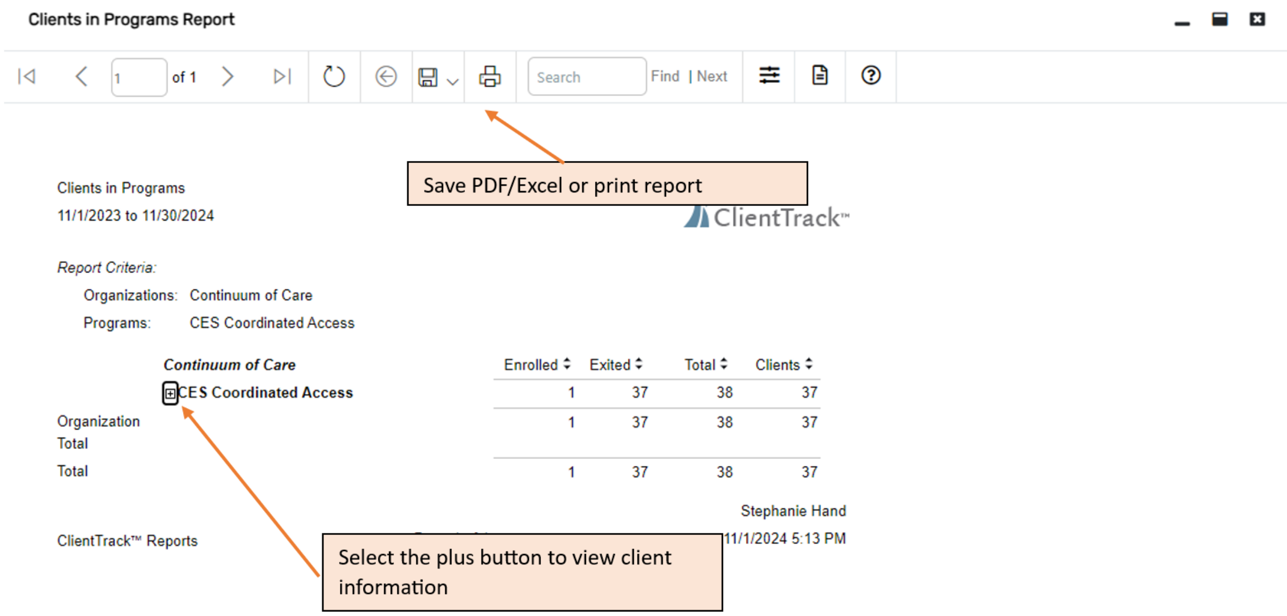


Clients in Program

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.



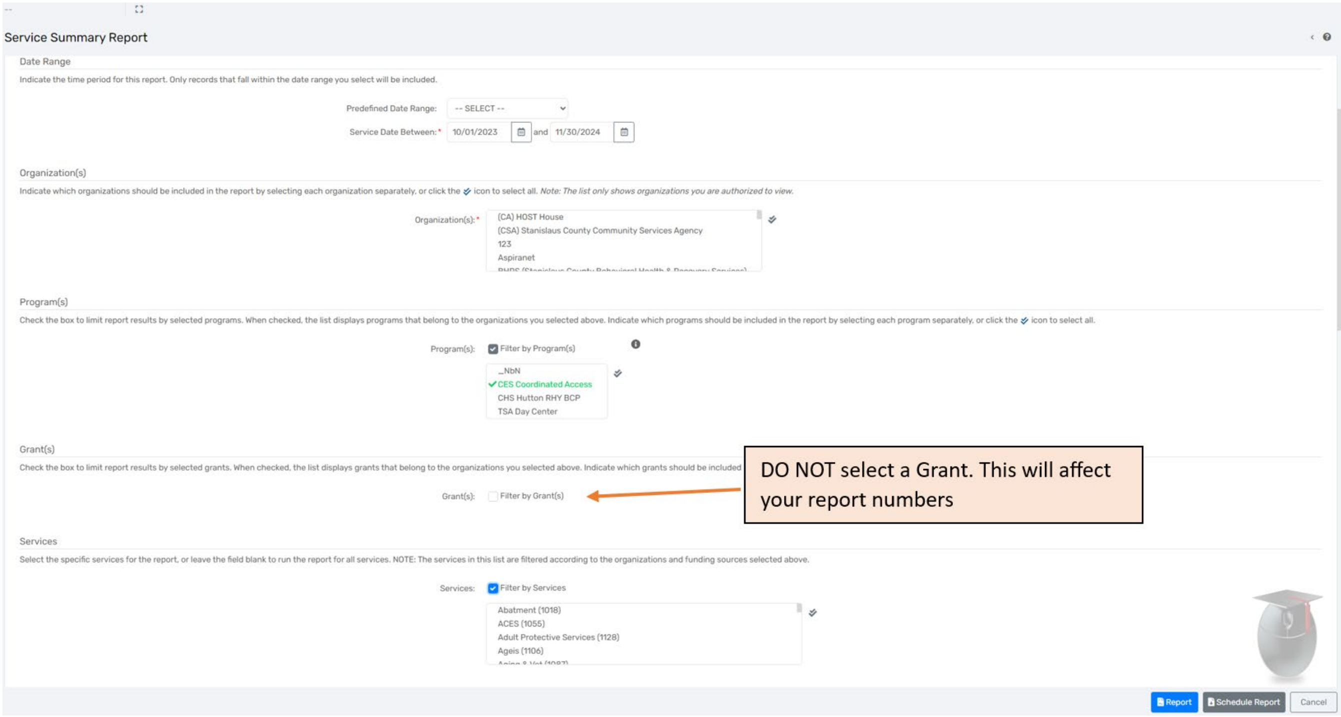
Once the report has been completed, you will see the clients in that program during the requested time range. Selecting the plus sign next to each client will allow you to view more information about the enrollment. You may also save this document as Excel, Excel Data, PDF, or Word document or print.



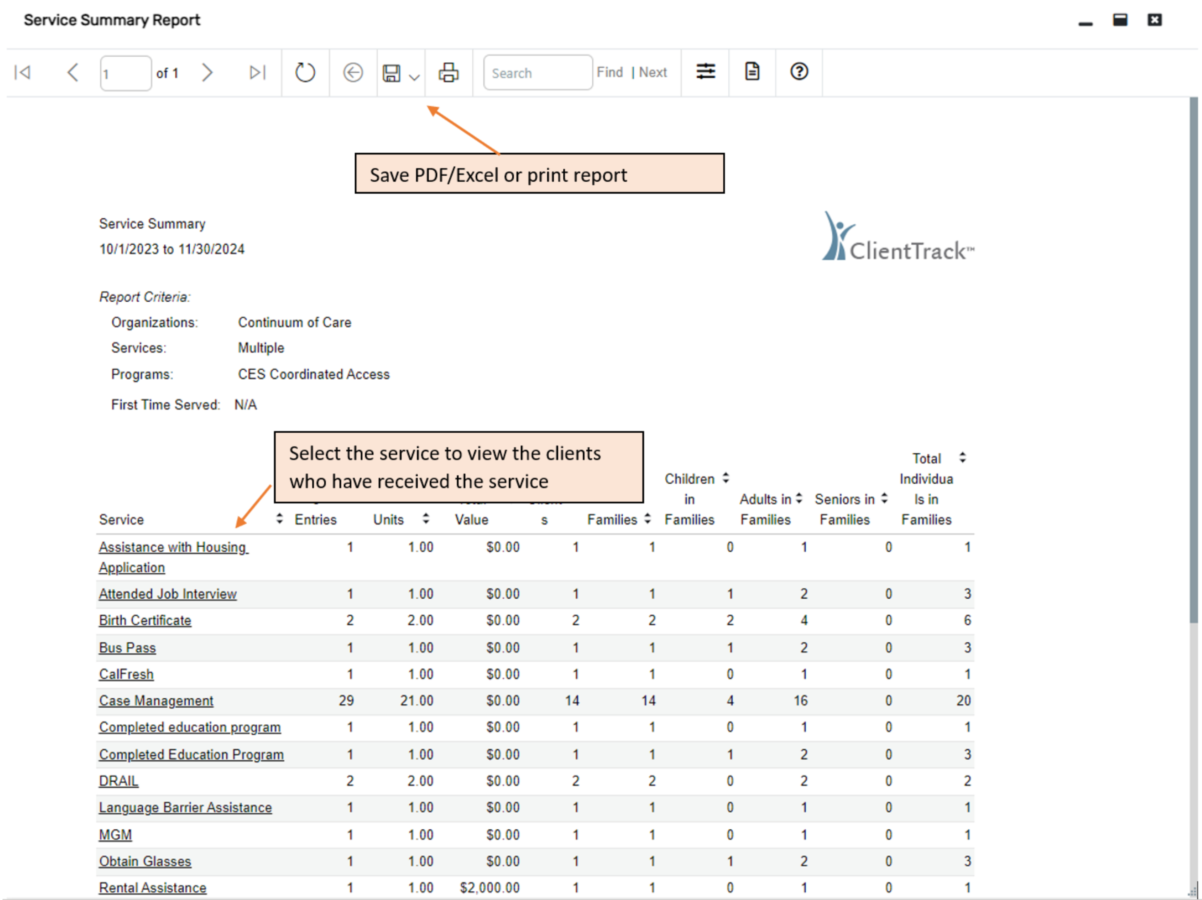
Service Summary Report

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.



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.



Service Summary Report

1 of 1 Search Find | Next

Save PDF/Excel or print report

Service Summary
10/1/2023 to 11/30/2024

ClientTrack™

Report Criteria:
Organizations: Continuum of Care
Services: Multiple
Programs: CES Coordinated Access
First Time Served: N/A

Select the service to view the clients who have received the service

Service	Entries	Units	Value	s	Families	Children in Families	Adults in Families	Seniors in Families	Total Individuals in Families
Assistance with Housing Application	1	1.00	$0.00	1	1	0	1	0	1
Attended Job Interview	1	1.00	$0.00	1	1	1	2	0	3
Birth Certificate	2	2.00	$0.00	2	2	2	4	0	6
Bus Pass	1	1.00	$0.00	1	1	1	2	0	3
CalFresh	1	1.00	$0.00	1	1	0	1	0	1
Case Management	29	21.00	$0.00	14	14	4	16	0	20
Completed education program	1	1.00	$0.00	1	1	0	1	0	1
Completed Education Program	1	1.00	$0.00	1	1	1	2	0	3
DRAIL	2	2.00	$0.00	2	2	0	2	0	2
Language Barrier Assistance	1	1.00	$0.00	1	1	0	1	0	1
MGM	1	1.00	$0.00	1	1	0	1	0	1
Obtain Glasses	1	1.00	$0.00	1	1	1	2	0	3
Rental Assistance	1	1.00	$2,000.00	1	1	0	1	0	1

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

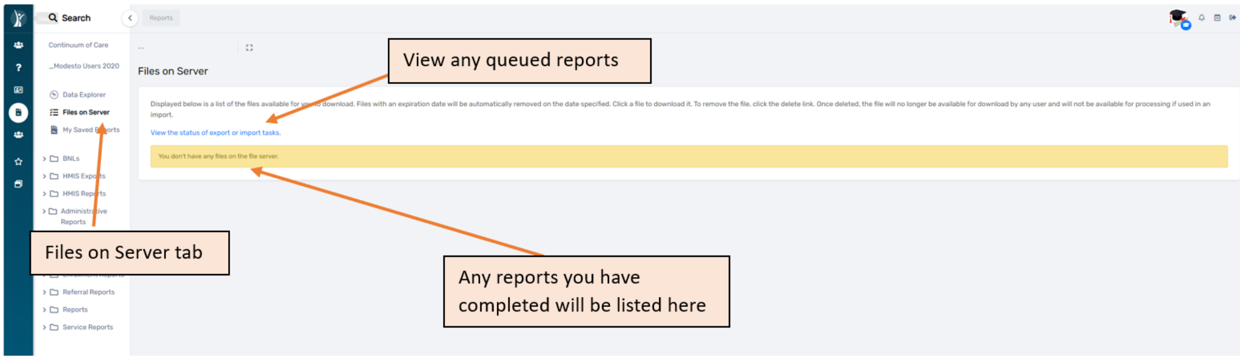
HMIS CSV Format-Specifications

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.

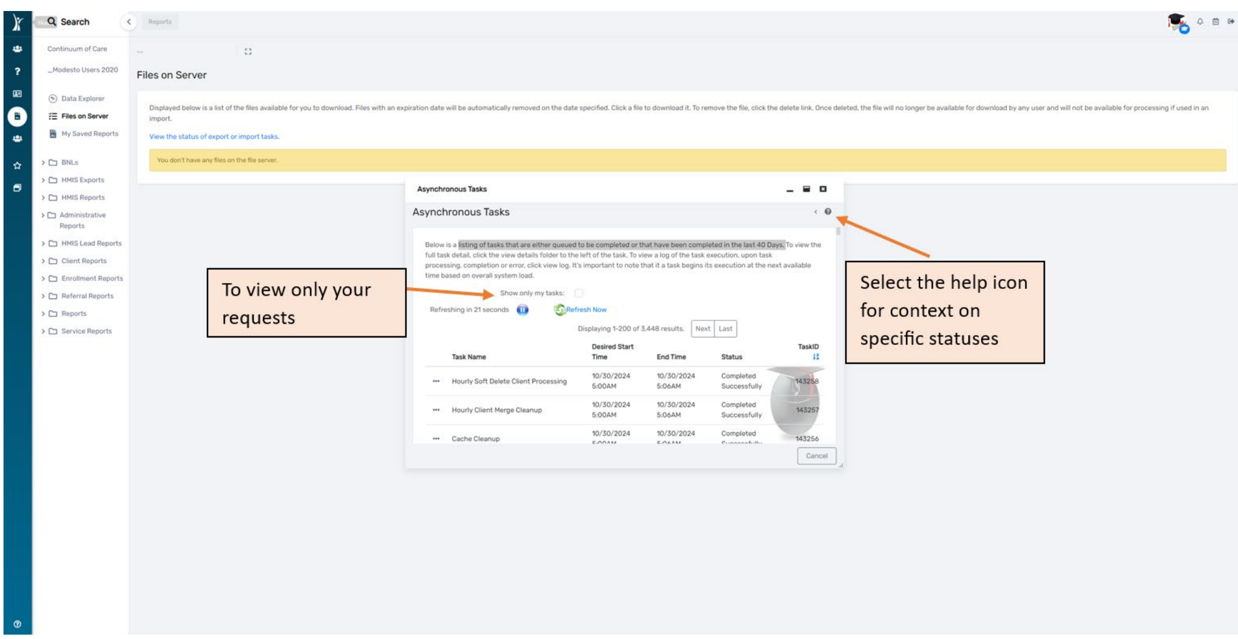
Please remember you must delete the file from your downloads folder and clear your recycle bin. Unless you save the document on a secure drive, files should never be kept on your computer. You can download the file again from Files on Server if you need them. Note: record the Task ID to identify which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



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.



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.

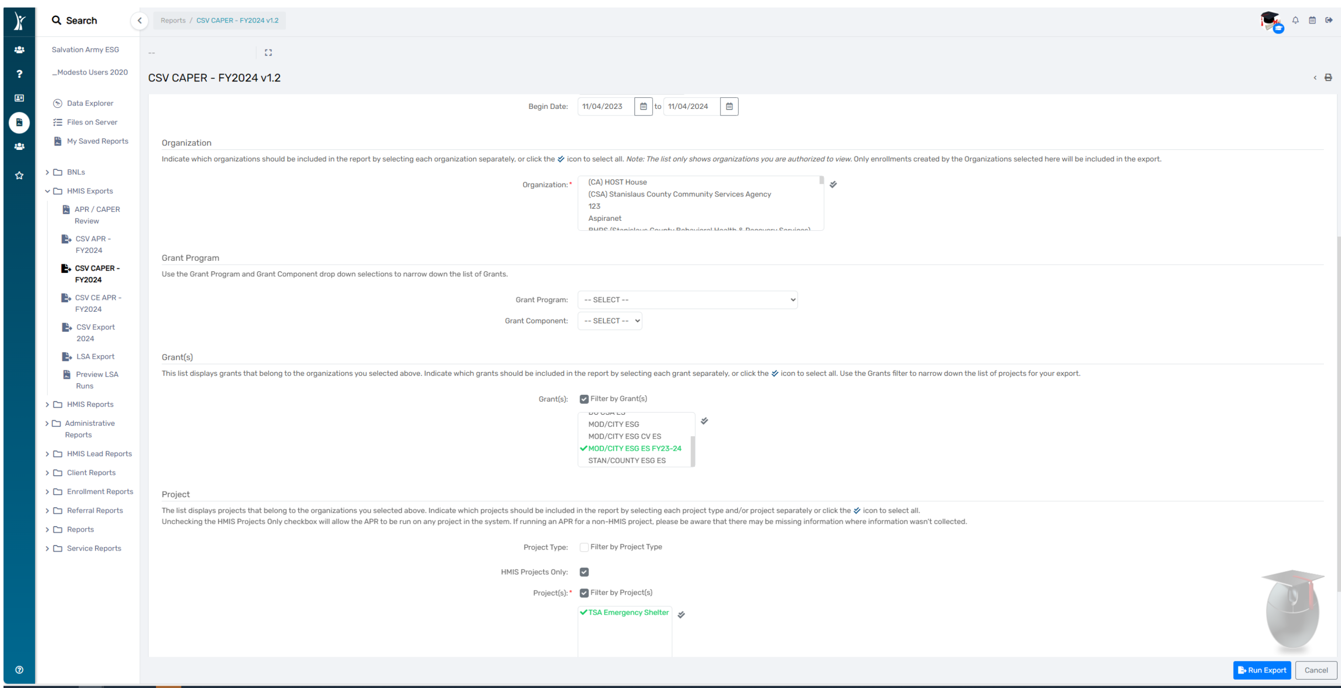
Processing: Background service is currently actively processing the task

Completed Successfully: Task completed as expected without errors

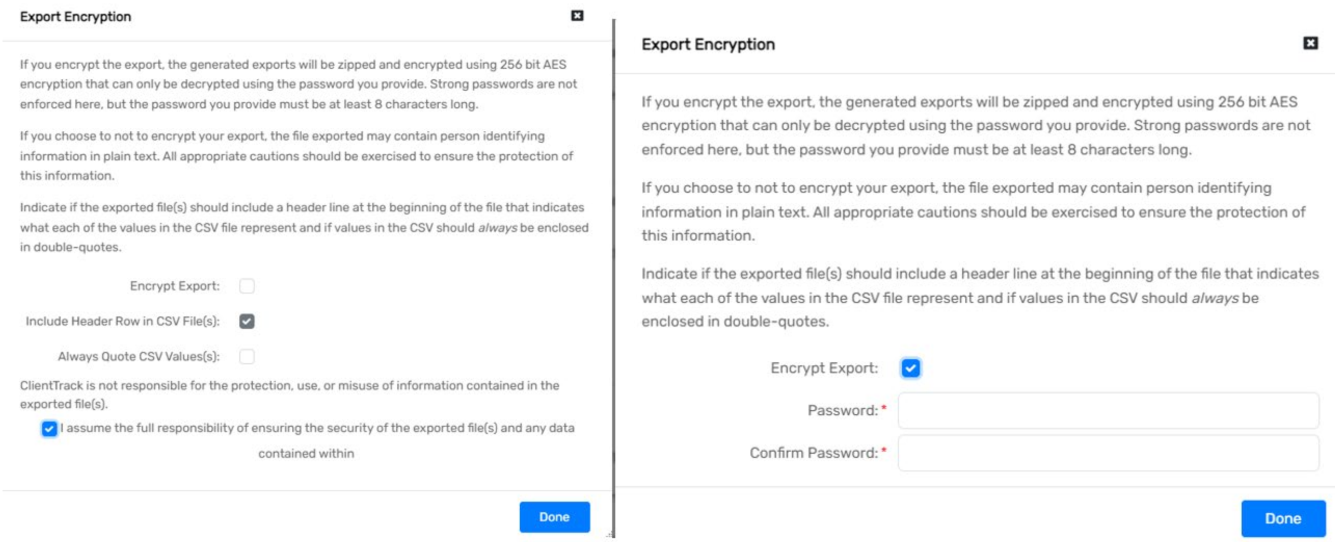
Error: There was an error running the task review the log to determine what may have caused the task to be unsuccessful in execution.

CSV CAPER

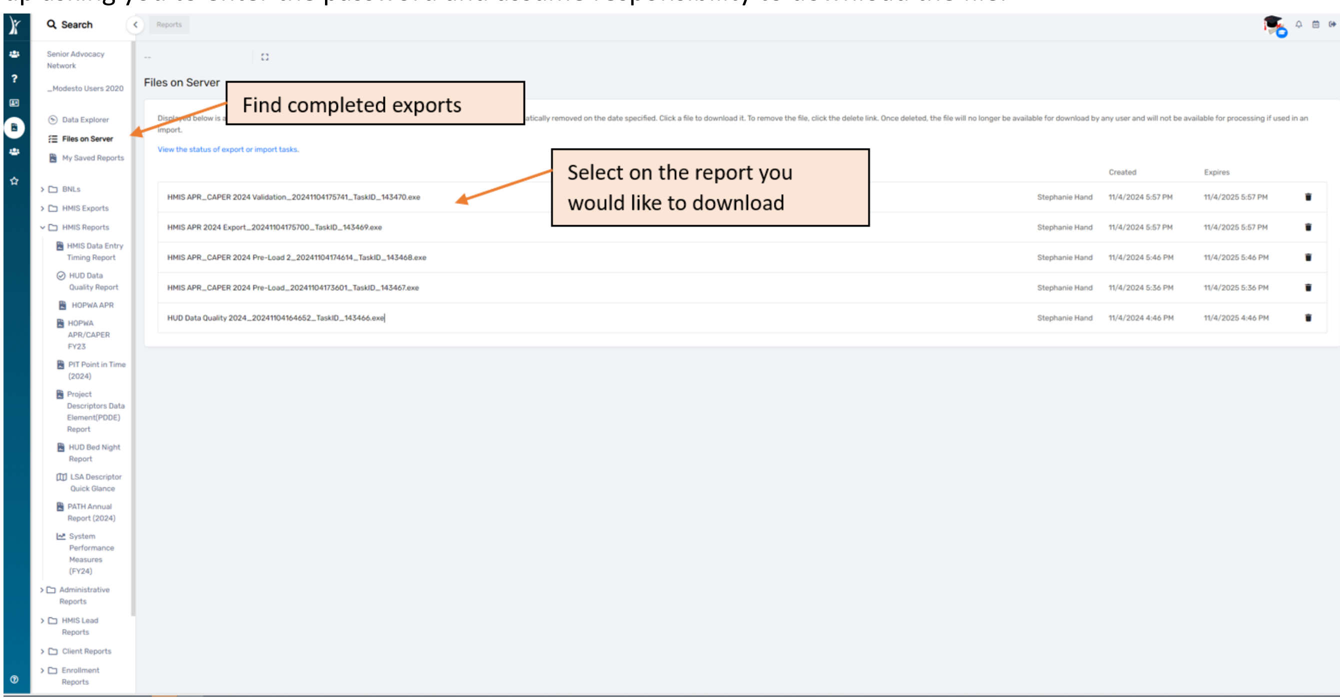
Navigate to the Reports Dashboard and select the HMIS Exports folder. Select CSV-CAPER FY2024. Select your date range and choose the grant program, grant component, grant(s), and project(s). Generate Validation File will be auto selected. Unselect this only if you do not wish to generate a validation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

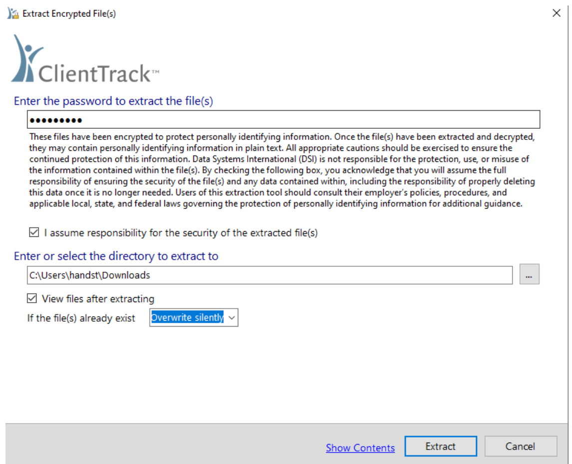


Once you select Run Export, you will receive a pop-up in regards to exporting the encryption. If you choose to encrypt the export, you will need to create a password for the downloaded documents. If you record a password, as you will be asked to enter it to complete the download. **Note:** Some firewall 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.



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.



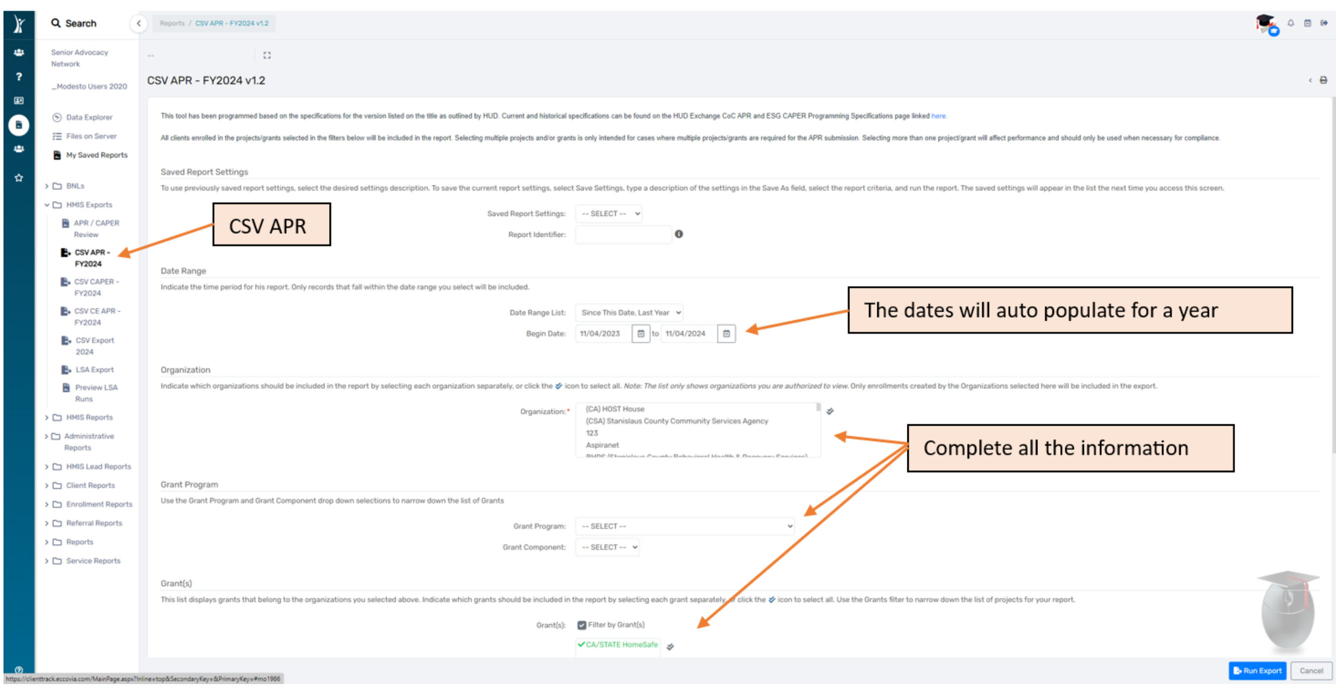


Review further in this guide for more information about the Validation Report.

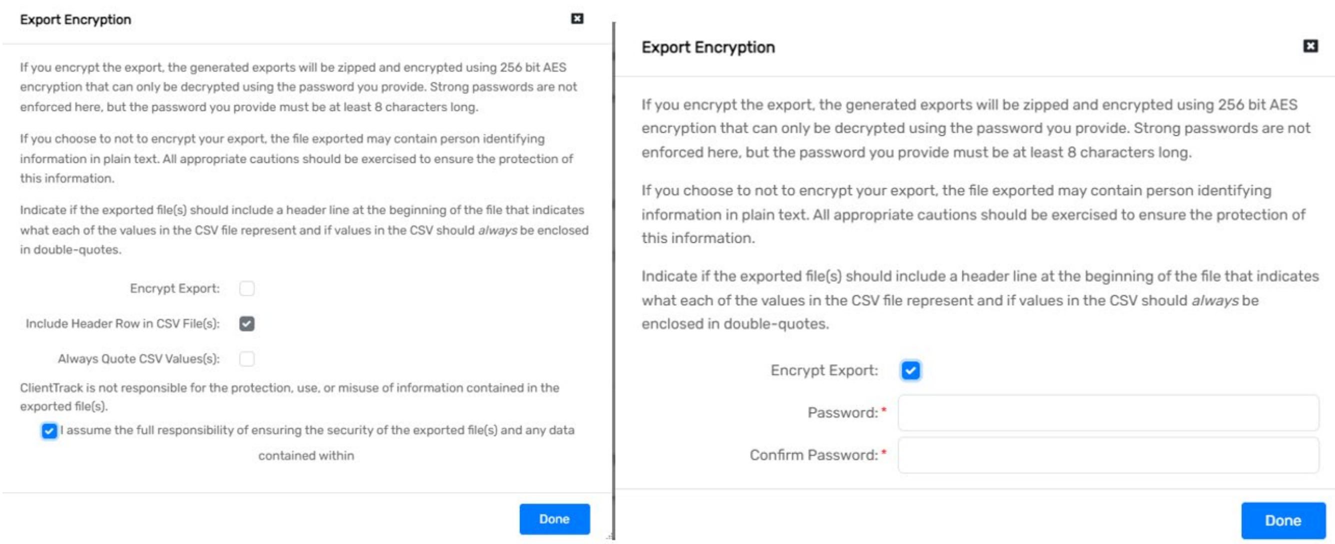
CSV APR

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

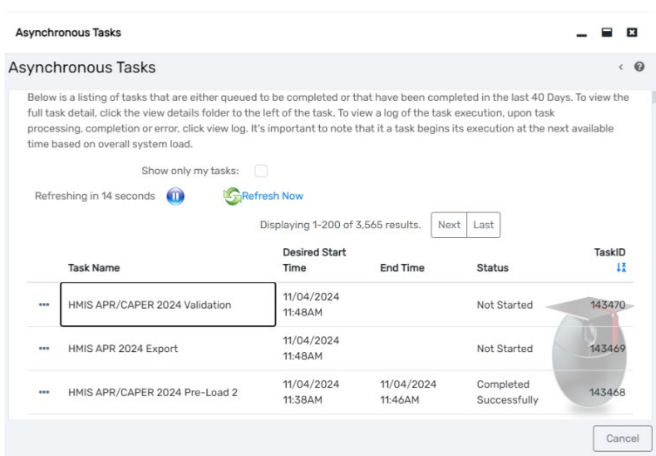
Navigate to the Reports Dashboard and select the HMIS Exports folder. Select CSV APR FY2024. Complete all the information. **Note:** Generate Validation File will be auto selected. If you would like a validation file with the APR, keep this box marked.



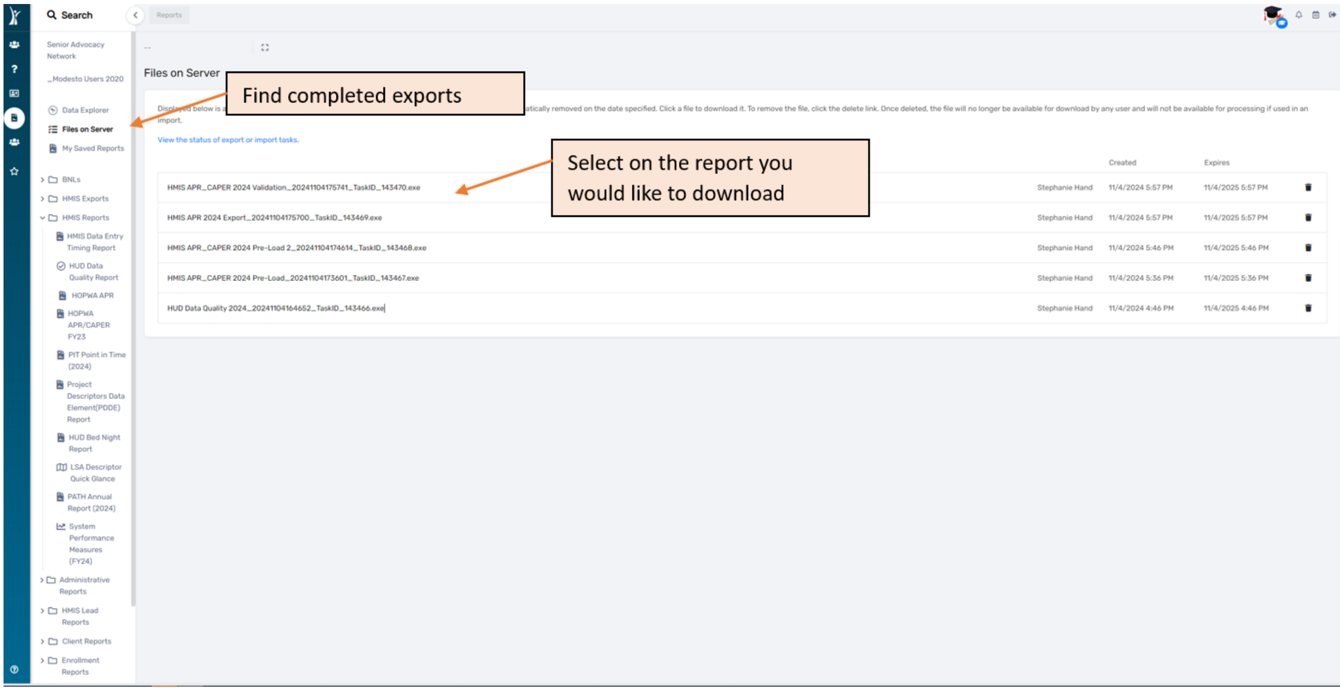
Once you select Run Export, you will receive a pop-up in regards to exporting the encryption. If you choose to encrypt the export, you will need to create a password for the downloaded documents. If you record a password, as you will be asked to enter it to complete the download. Note: Some firewall 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.

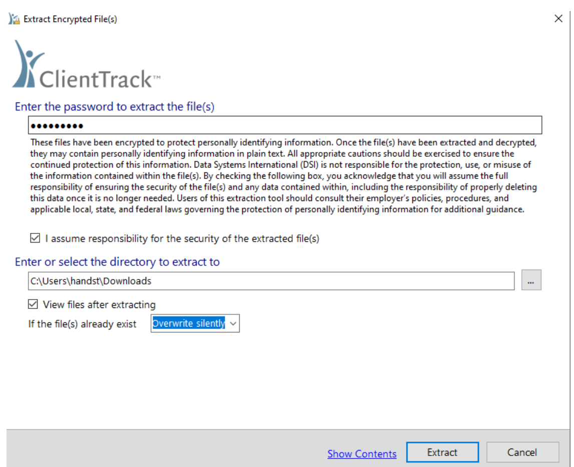


After completing the step above, you will be directed to wait for your export to finalize. You can monitor the progress of the export on [Asynchronous Tasks.](#) The encrypted set of files will display on your [Files and Server](#) page when it has completed. Please remember to refresh the Files on Server 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).



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.





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.

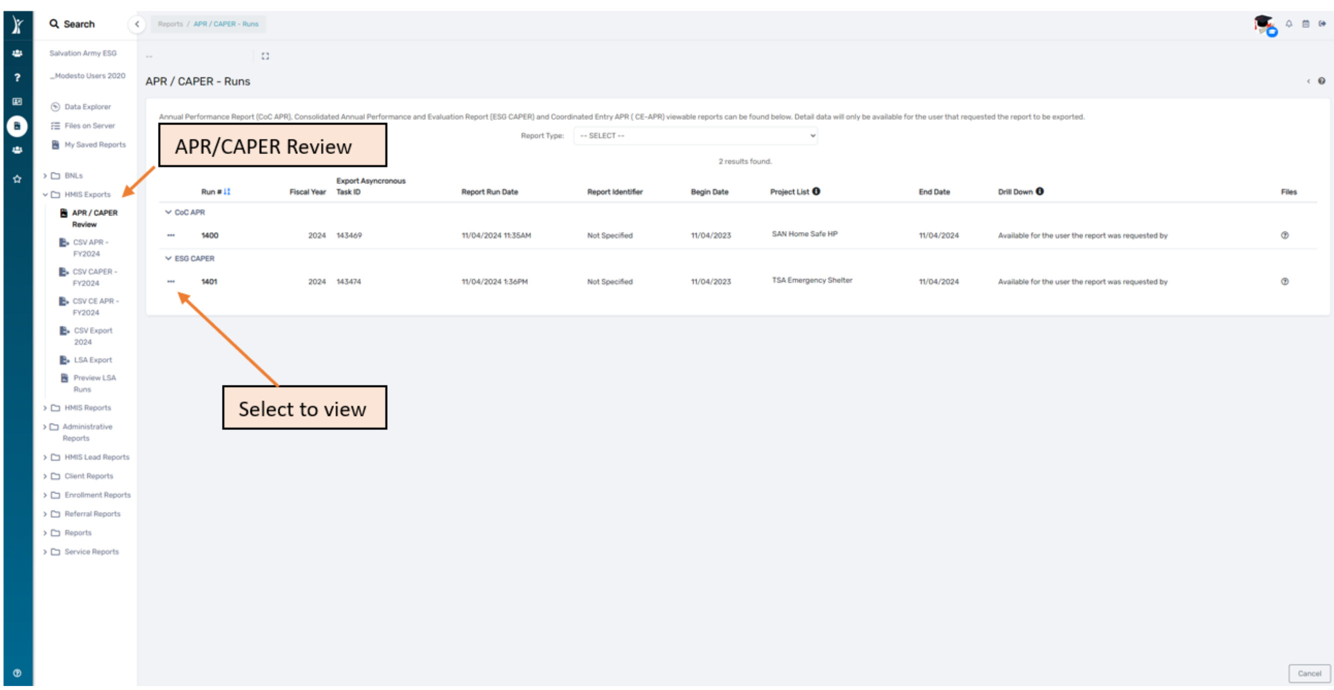
Street Outreach Projects: Because the data quality questions require a date of engagement in order to be counted, the number of clients shown in Q5a will tend to not equal the number of clients (adults, leavers, etc.) in corresponding questions. The validation rule will check that the count of clients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

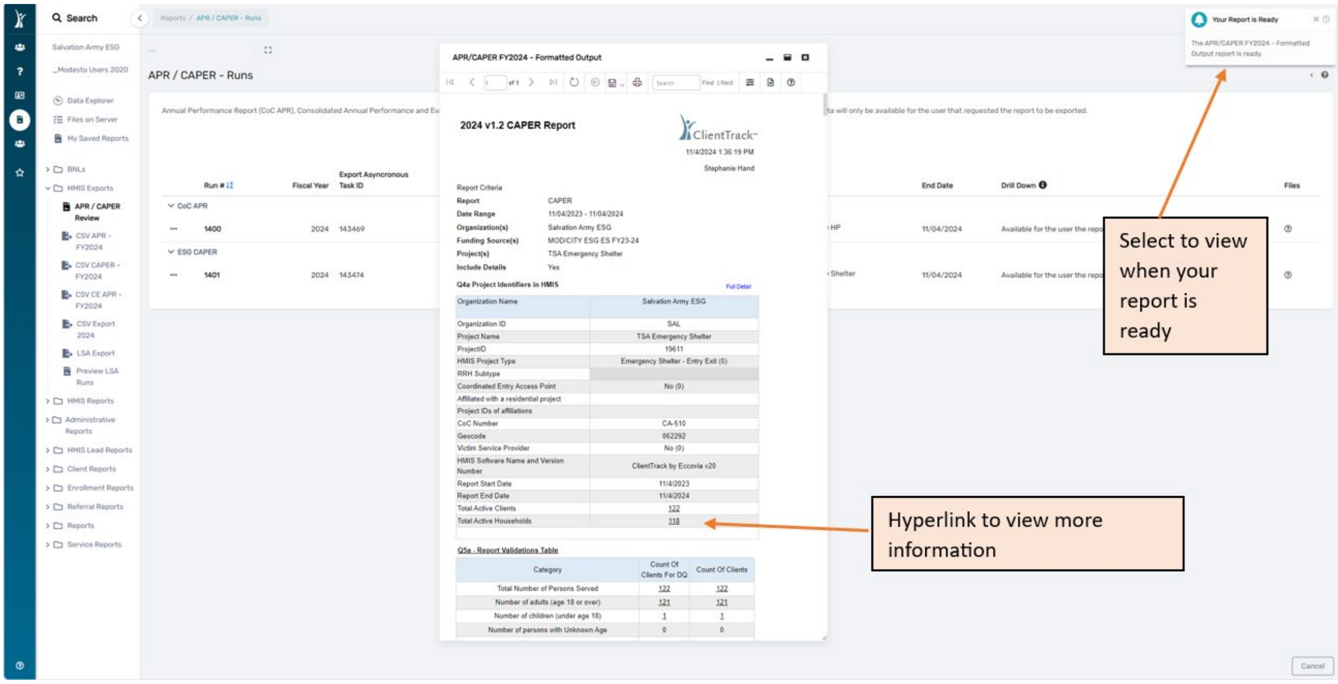
APR/CAPER Review

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 [Birds Eye Overview](#) 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.

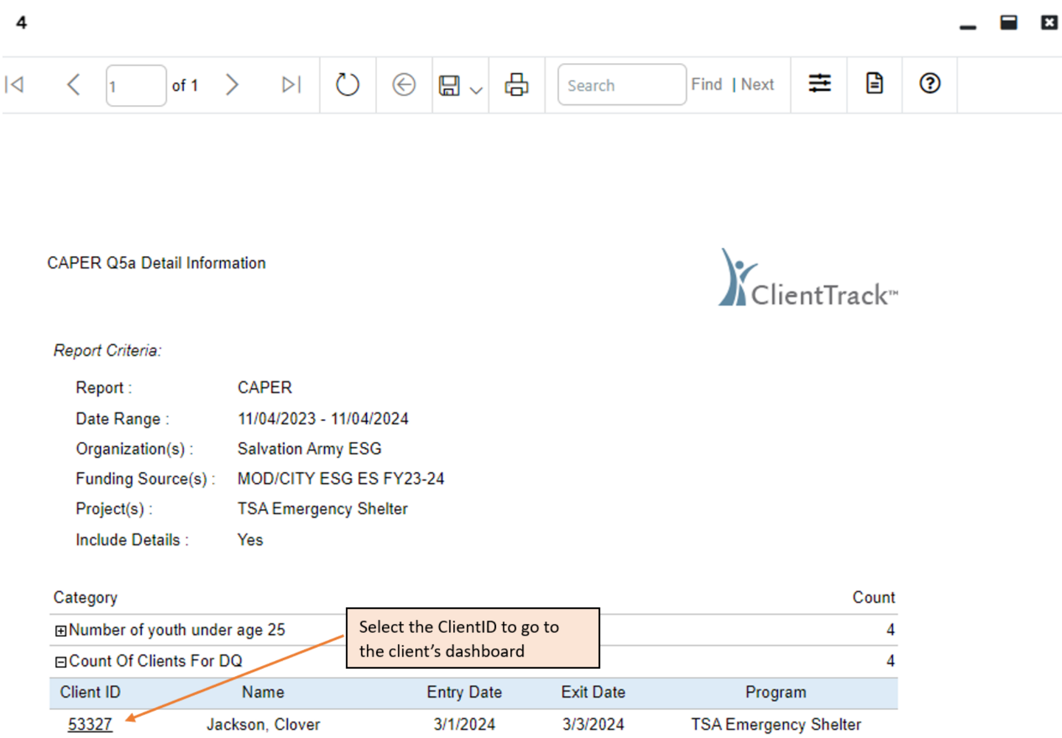
Navigate to the Reports Dashboard and select the HMIS Exports folder. Select APR/CAPER Review. Select the report you wish to view. Note: You must run your CSV APR or CSV CAPER first. You will not see your report listed if you have not run the report.



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.



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.

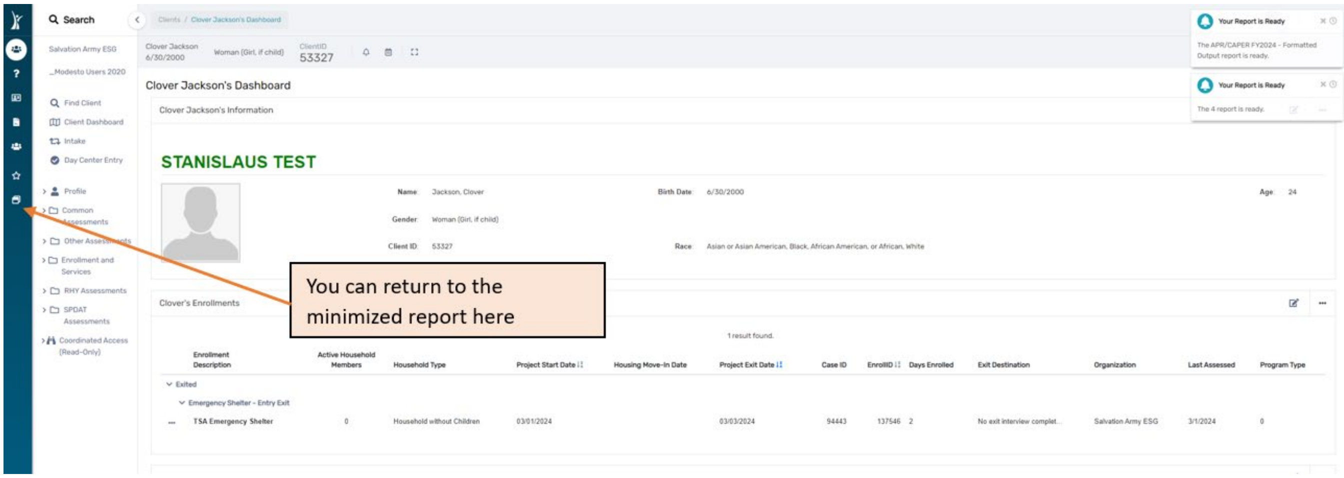


CAPER Q5a Detail Information

Report Criteria:

Report :	CAPER
Date Range :	11/04/2023 - 11/04/2024
Organization(s) :	Salvation Army ESG
Funding Source(s) :	MOD/CITY ESG ES FY23-24
Project(s) :	TSA Emergency Shelter
Include Details :	Yes

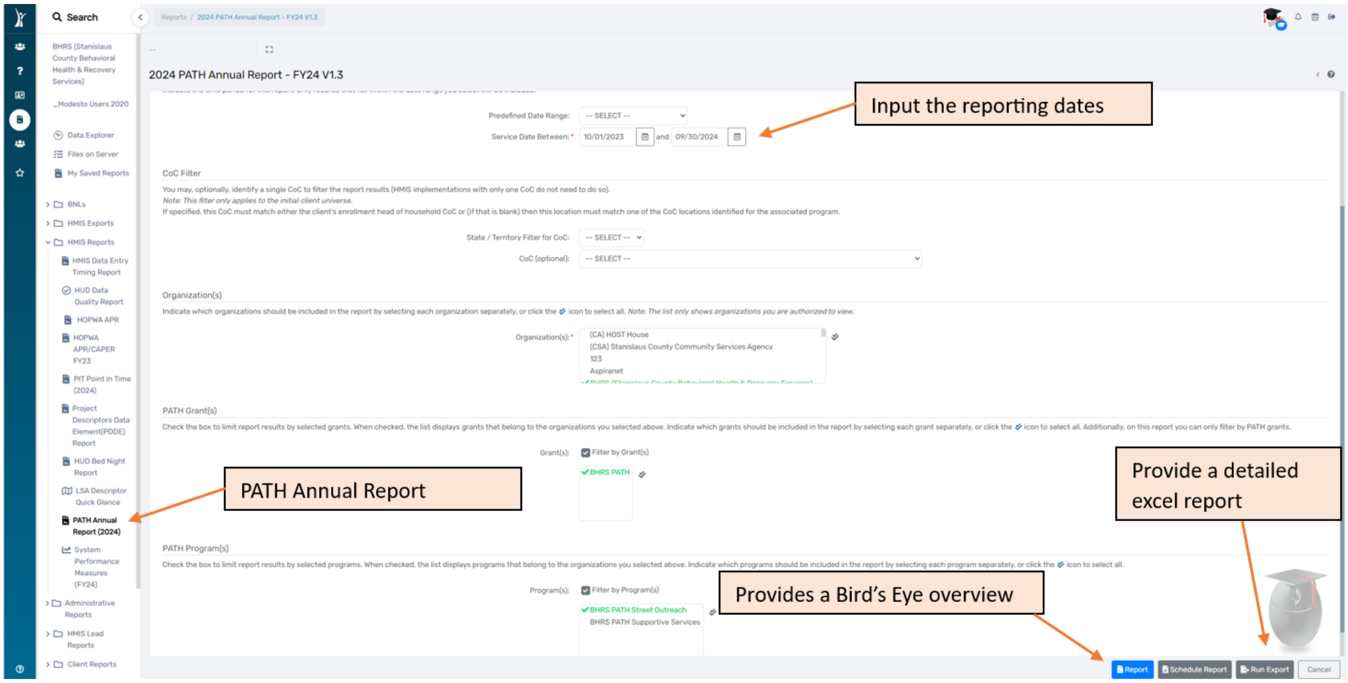
Category				Count
⊞Number of youth under age 25				4
⊟Count Of Clients For DQ				4
Client ID	Name	Entry Date	Exit Date	Program
53327	Jackson, Clover	3/1/2024	3/3/2024	TSA Emergency Shelter



PATH Annual Report

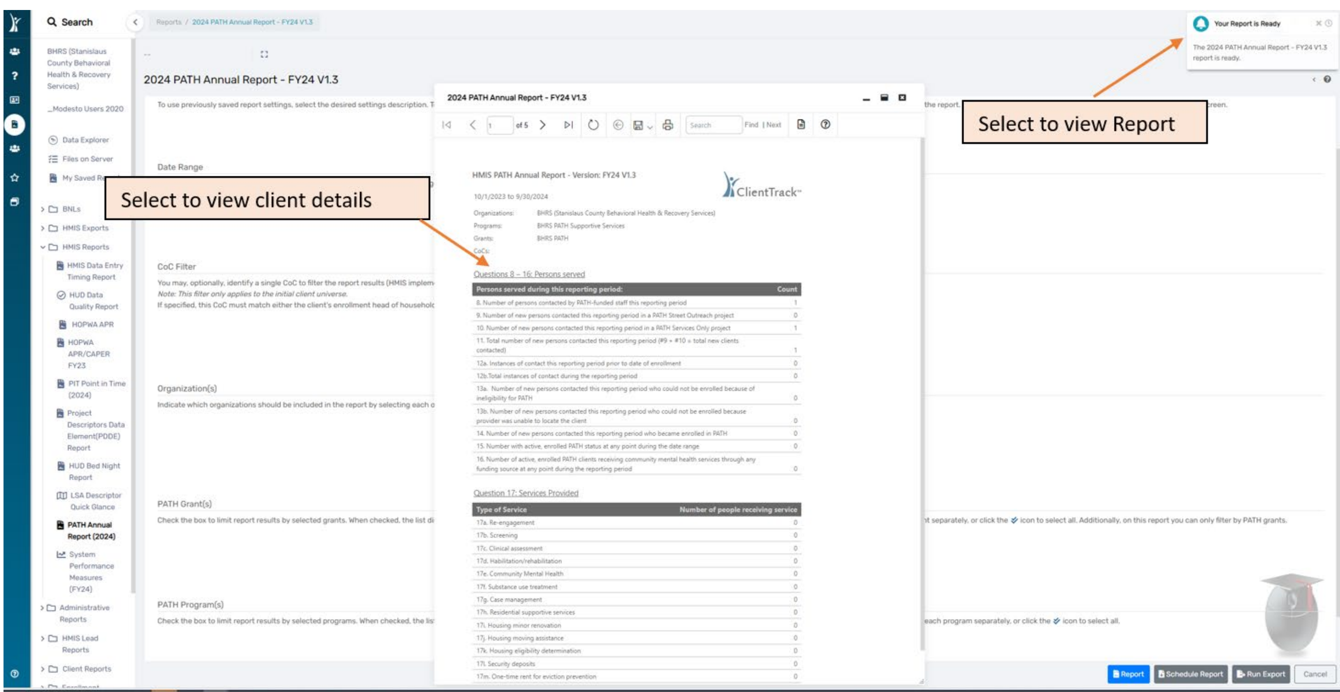
This report is for PATH specific projects. The report dates you set identify the date range to find active clients. Active clients are those with a project stay in the date range and have a contact, Date of Engagement, Date PATH Status Determined, or PATH Funded service entered in the date range. PATH 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.



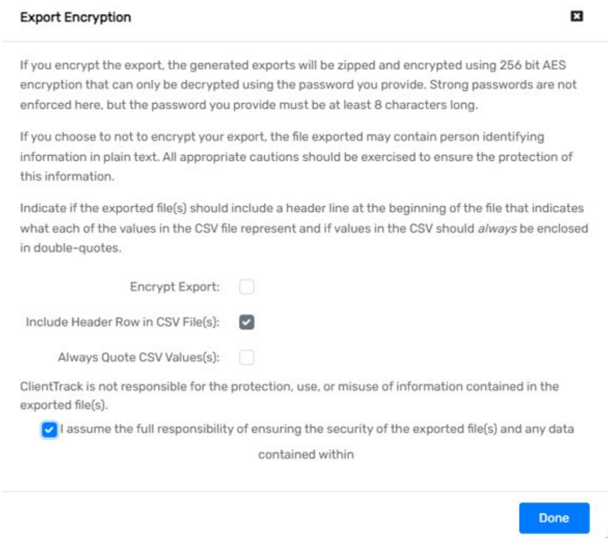
Bird's Eye Overview

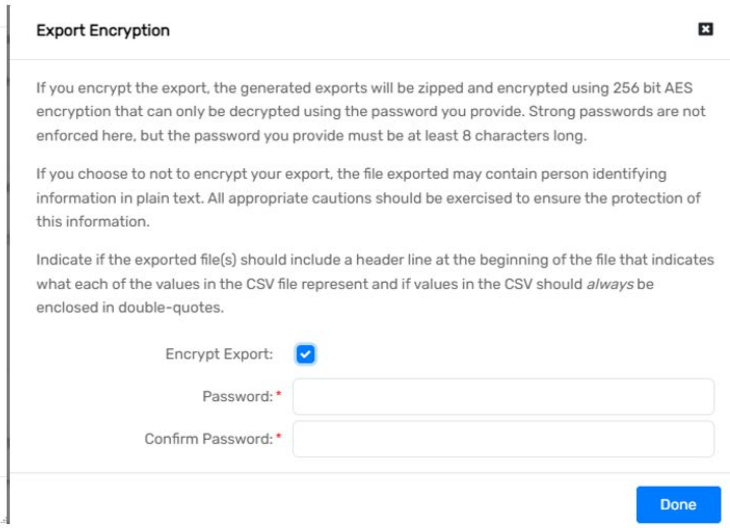
Utilize the Bird's Eye Overview as a quick view of the report numbers. On this report, you can select the hyperlinks for each table title to view additional client level details.



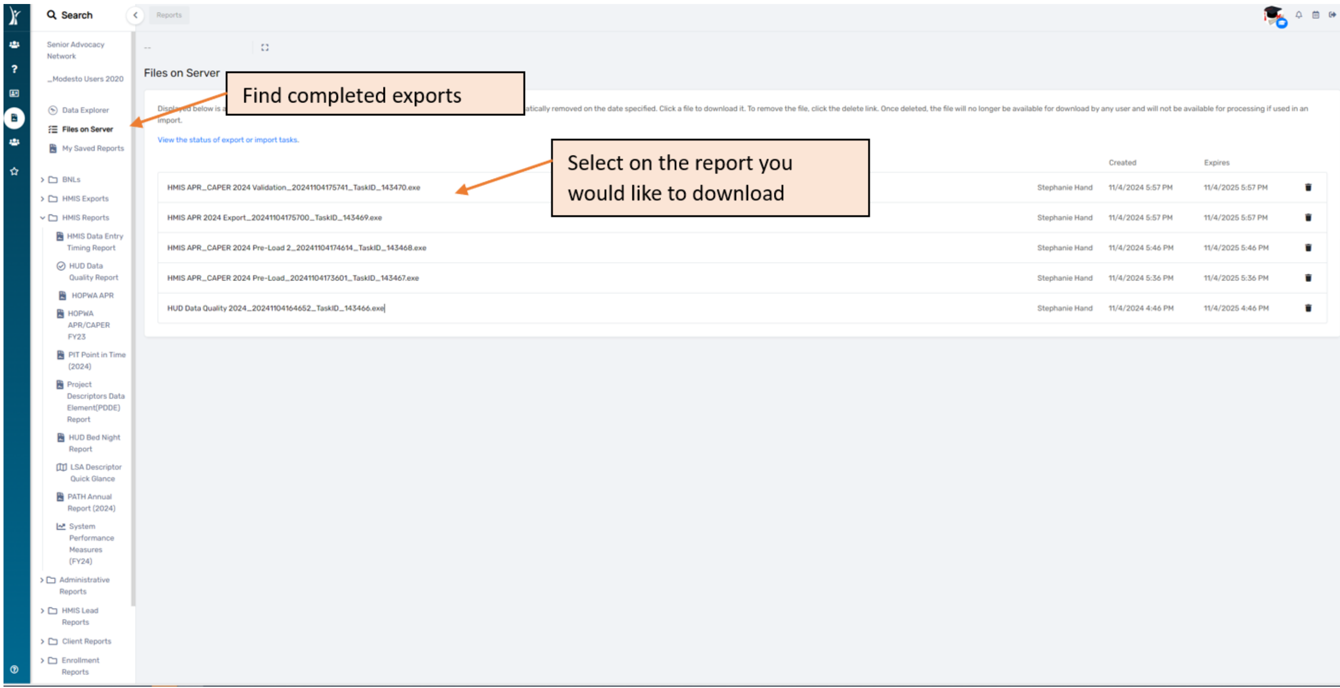
Detailed Export

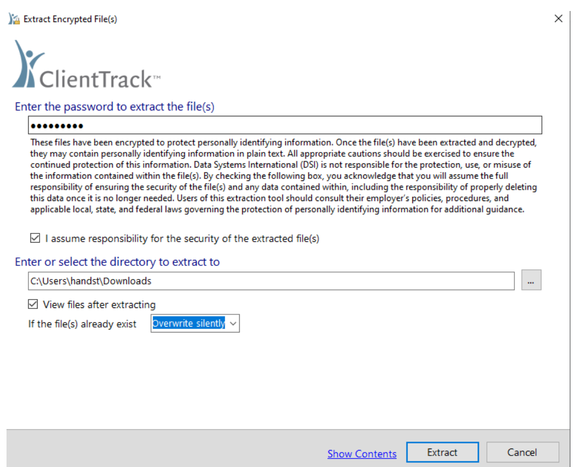
Once you select Run Export, you will receive a pop-up in regards to exporting the encryption. If you choose to encrypt the export, you will need to create a password for the downloaded documents. If you record a password, as you will be asked to enter it to complete the download. Note: Some firewall 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.



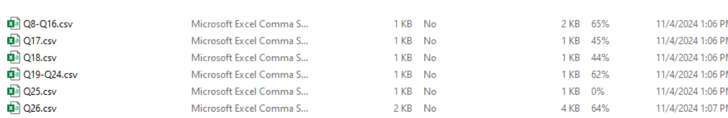


Your report may take 20 minutes or longer to generate. Once your report is ready, download the file by selecting on the name. If you added a password, you will receive a pop-up asking you to enter the password and assume responsibility to download the file.





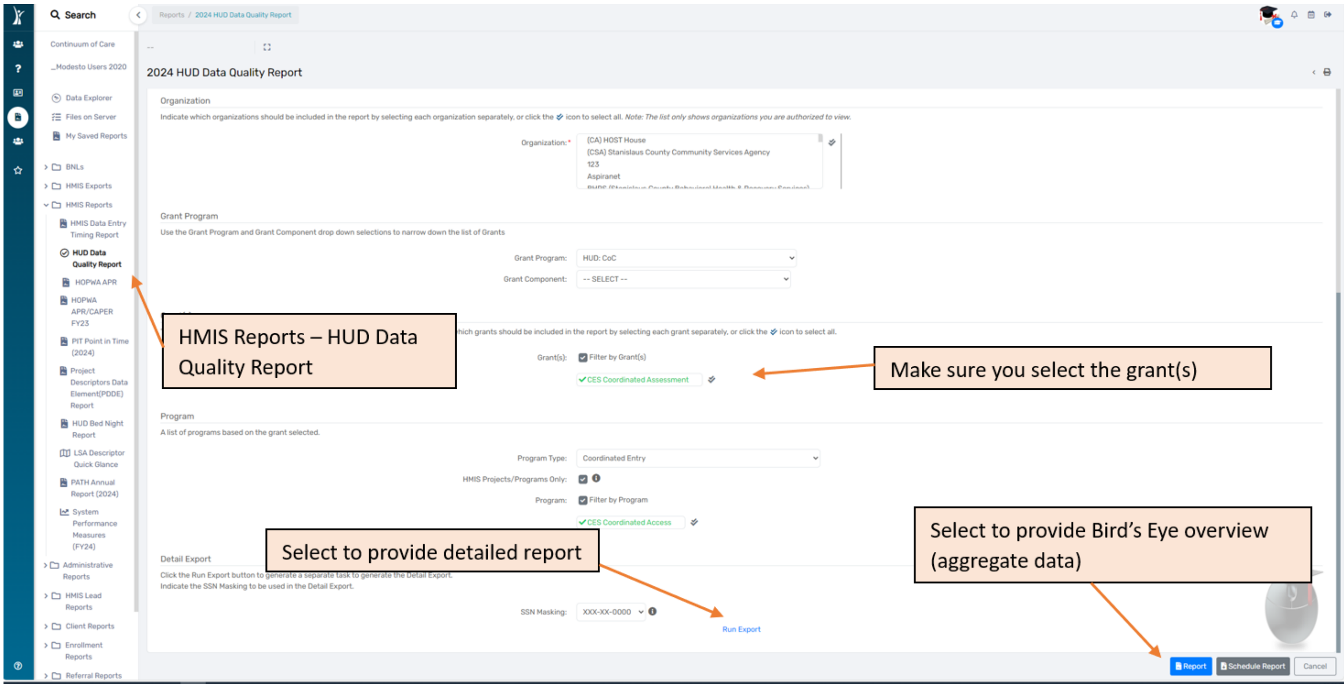
The export will show six excel files that provide detailed information about the PATH report, as shown in the example below.



HUD Data Quality Report

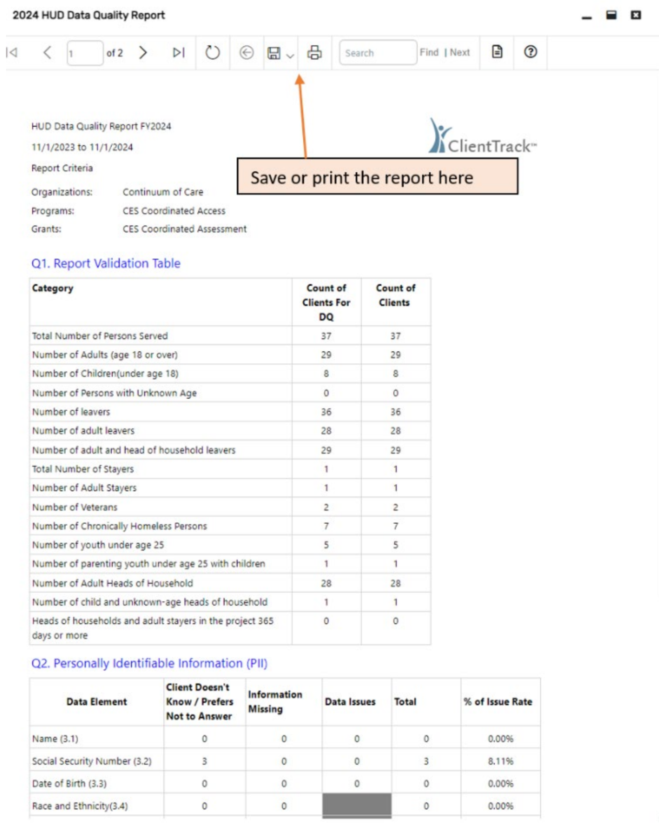
This report reviews data quality across many HUD data elements.

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.



Overview (Birds Eye View)

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



HUD Data Quality Report FY2024
11/1/2023 to 11/1/2024
Report Criteria

Organizations: Continuum of Care
Programs: CES Coordinated Access
Grants: CES Coordinated Assessment

Q1. Report Validation Table

Category	Count of Clients For DQ	Count of Clients
Total Number of Persons Served	37	37
Number of Adults (age 18 or over)	29	29
Number of Children(under age 18)	8	8
Number of Persons with Unknown Age	0	0
Number of leavers	36	36
Number of adult leavers	28	28
Number of adult and head of household leavers	29	29
Total Number of Stayers	1	1
Number of Adult Stayers	1	1
Number of Veterans	2	2
Number of Chronically Homeless Persons	7	7
Number of youth under age 25	5	5
Number of parenting youth under age 25 with children	1	1
Number of Adult Heads of Household	28	28
Number of child and unknown-age heads of household	1	1
Heads of households and adult stayers in the project 365 days or more	0	0

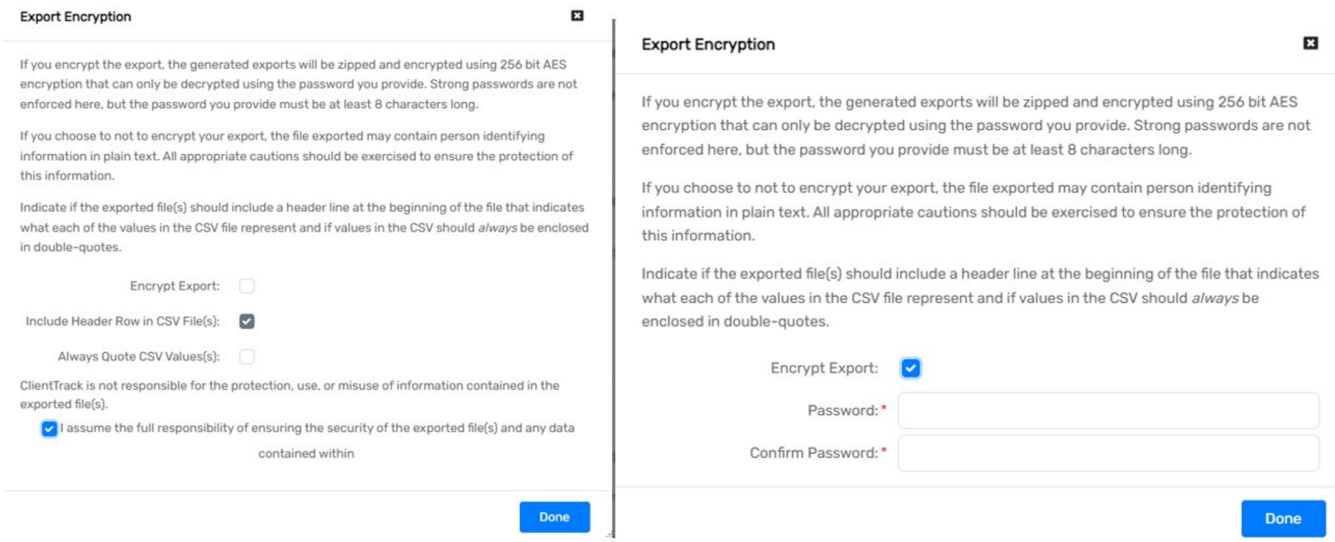
Q2. Personally Identifiable Information (PII)

Data Element	Client Doesn't Know / Prefers Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Name (3.1)	0	0	0	0	0.00%
Social Security Number (3.2)	3	0	0	3	8.11%
Date of Birth (3.3)	0	0	0	0	0.00%
Race and Ethnicity(3.4)	0	0		0	0.00%

Detailed Report (Export)

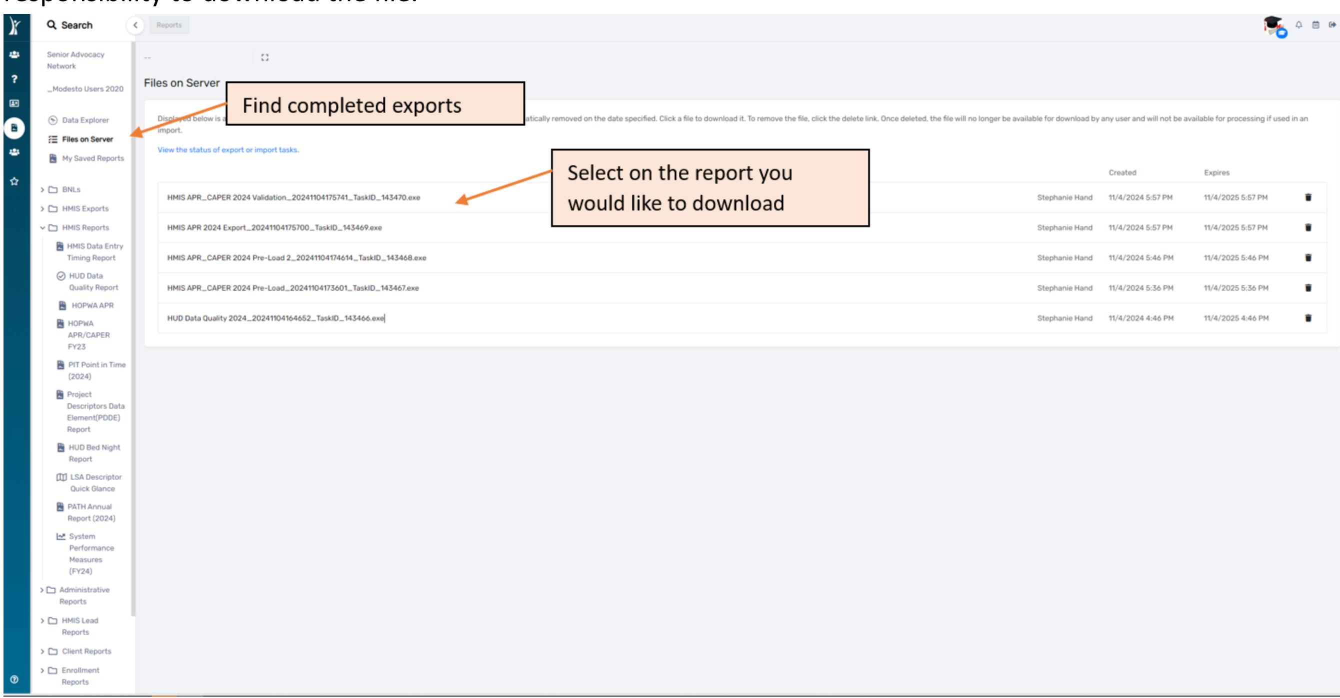
With the increased complexity and requirements of aggregate federal compliance reporting, access to client level data is critical to troubleshooting. To meet the need of client level data for several compliance reports, the DQ Detail Export will produce the list of active clients used in aggregate reports.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

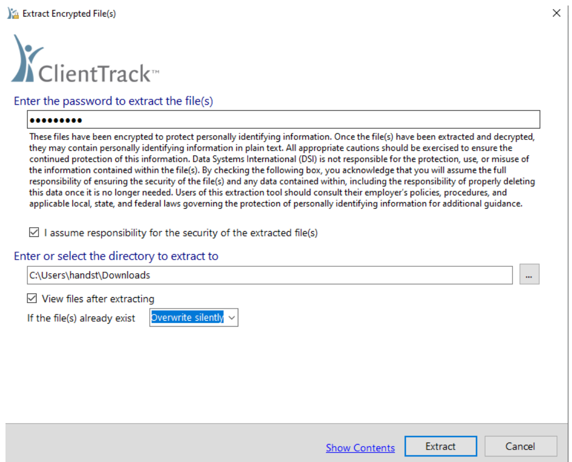
Once you select Run Export, you will receive a pop-up in regards to exporting the encryption. If you choose to encrypt the export, you will need to create a password for the downloaded documents. If you record a password, as you will be asked to enter it to complete the download. Note: Some firewall 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.



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 [Asynchronous Tasks.]() The encrypted set of files will display on your [Files and Server]() 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.

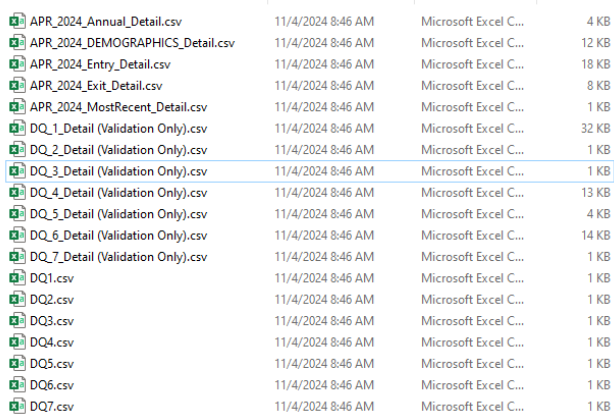




Review further in this guide for more information about the [Validation Report.]

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.



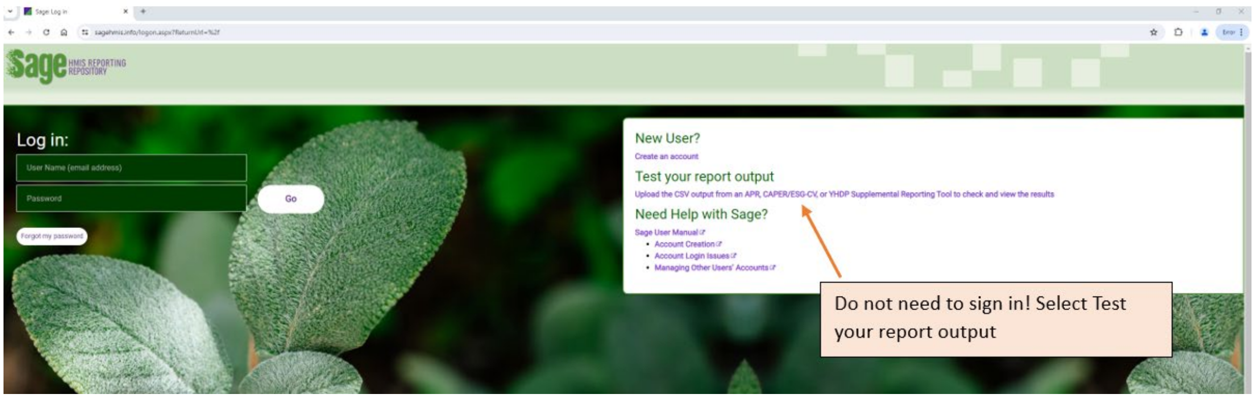
We will use the DQ Detailed Export, DQ_2 Detail (Validation Only) as an example below. The validation will show any Client Doesn't Know/Prefers Not to Answer responses, missing data, and/or data issues.

Data Element	clientid	Name	Client Doesn't Know/Prefers Not to Answer	Missing	DataIssue	DataIssue	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 Access
Social Security Number (3.2)	53027	Pizza, Tiny	Yes				137457	11/10/2023 0:00	11/10/2023 0:00	CES Coordinated Access
Social Security Number (3.2)	53028	Pizza, Big	Yes				137458	11/10/2023 0:00	11/10/2023 0:00	CES Coordinated Access

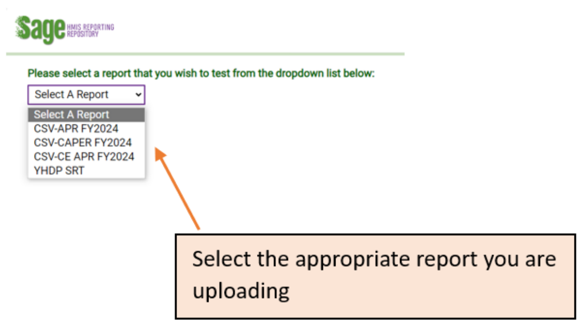
REMINDER: YOU CAN NOT CHANGE THE DATA ON THE EXCEL SPREADSHEET, YOU MUST CHANGE THE DATA IN HMIS

Sage HMIS - Generate a Report

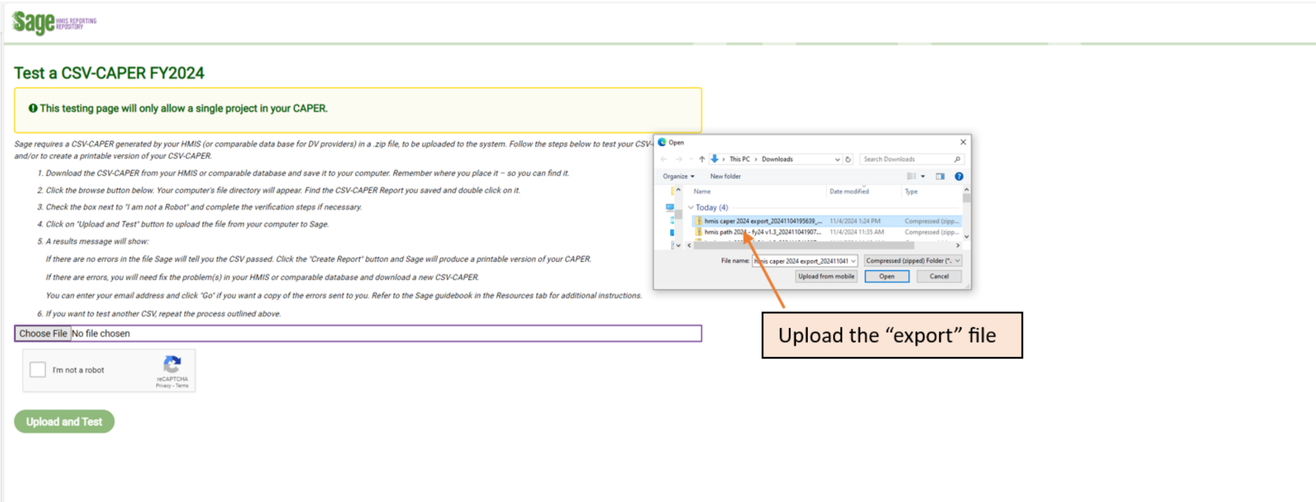
The CSV-APR and the CSV-CAPER can be uploaded into Sage HMIS. You do not need a log in to verify or generate your APR report in Sage HMIS. Visit www.sagehmis.info and select the **Upload a CSV output….** to generate a paper report link.



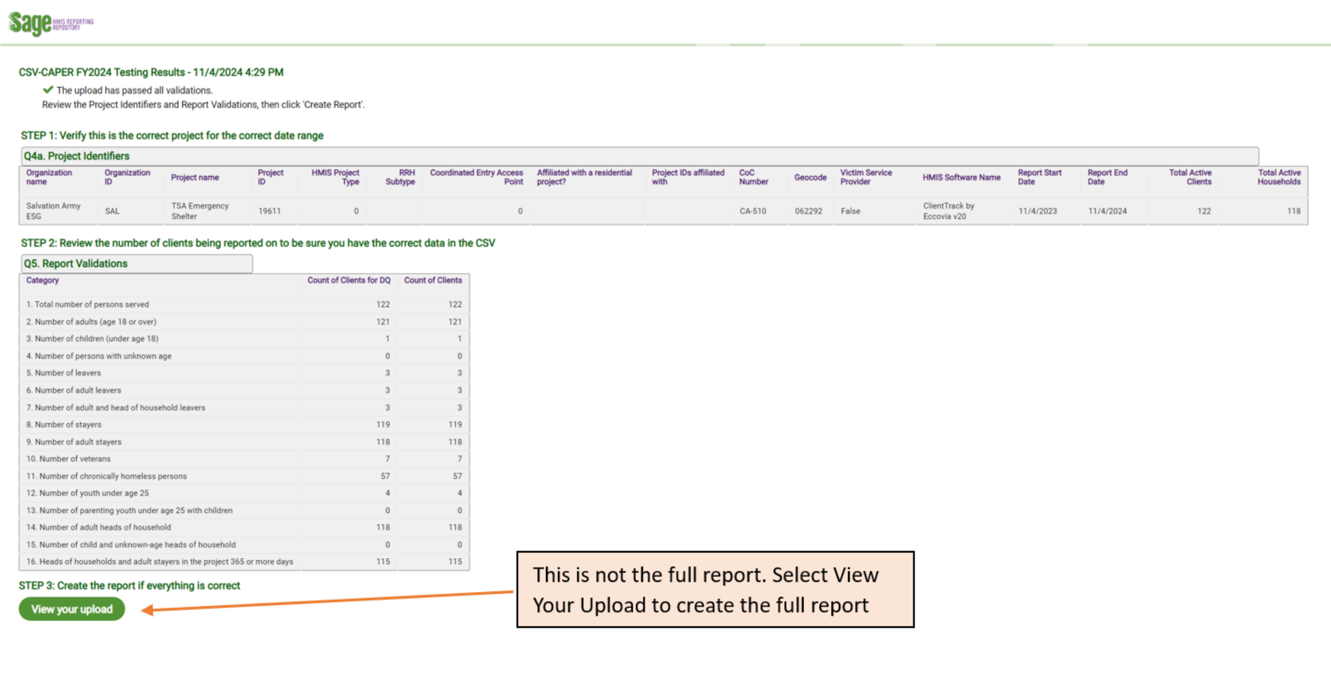
Select the appropriate report you will be uploading.



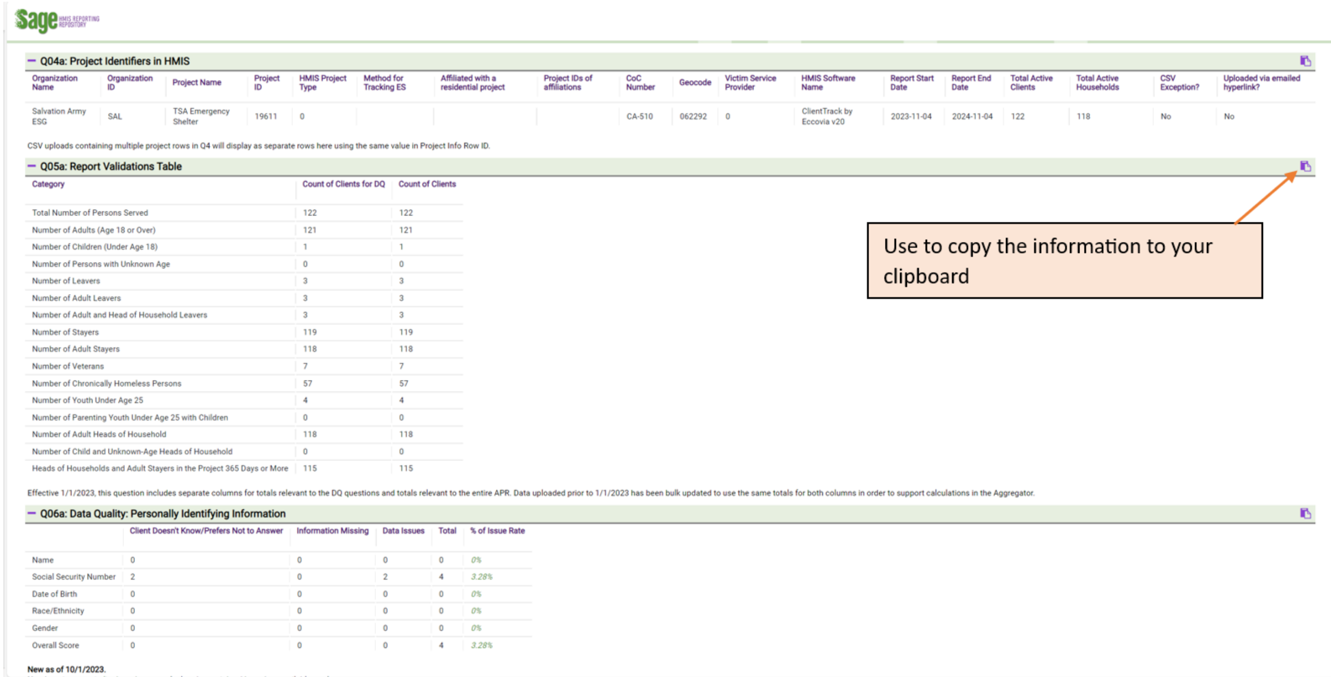
Select Choose File and when your documents show, choose the file you want to upload. This document should NOT have client level data. Click on the correct file you wish to upload and then Open**. Note:** The document uploaded should be the "export" file and cannot be opened before uploading. This will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



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 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.



Sage HMIS REPORTING REPOSITORY

Q04a: Project Identifiers in HMIS

Organization Name	Organization ID	Project Name	Project ID	HMIS Project Type	Method for Tracking ES	Affiliated with a residential project	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 emailed hyperlink?
Salvation Army ESG	SAL	TSA Emergency Shelter	19611	0				CA-510	062292	0	ClientTrack by Eccovia v20	2023-11-04	2024-11-04	122	118	No	No

CSV uploads containing multiple project rows in Q4 will display as separate rows here using the same value in Project Info Row ID.

Q05a: Report Validations Table

Category	Count of Clients for DQ	Count of Clients
Total Number of Persons Served	122	122
Number of Adults (Age 18 or Over)	121	121
Number of Children (Under Age 18)	1	1
Number of Persons with Unknown Age	0	0
Number of Leavers	3	3
Number of Adult Leavers	3	3
Number of Adult and Head of Household Leavers	3	3
Number of Stayers	119	119
Number of Adult Stayers	118	118
Number of Veterans	7	7
Number of Chronically Homeless Persons	57	57
Number of Youth Under Age 25	4	4
Number of Parenting Youth Under Age 25 with Children	0	0
Number of Adult Heads of Household	118	118
Number of Child and Unknown-Age Heads of Household	0	0
Heads of Households and Adult Stayers in the Project 365 Days or More	115	115

Effective 1/1/2023, this question includes separate columns for totals relevant to the DQ questions and totals relevant to the entire APR. Data uploaded prior to 1/1/2023 has been bulk updated to use the same totals for both columns in order to support calculations in the Aggregator.

Q06a: Data Quality: Personally Identifying Information

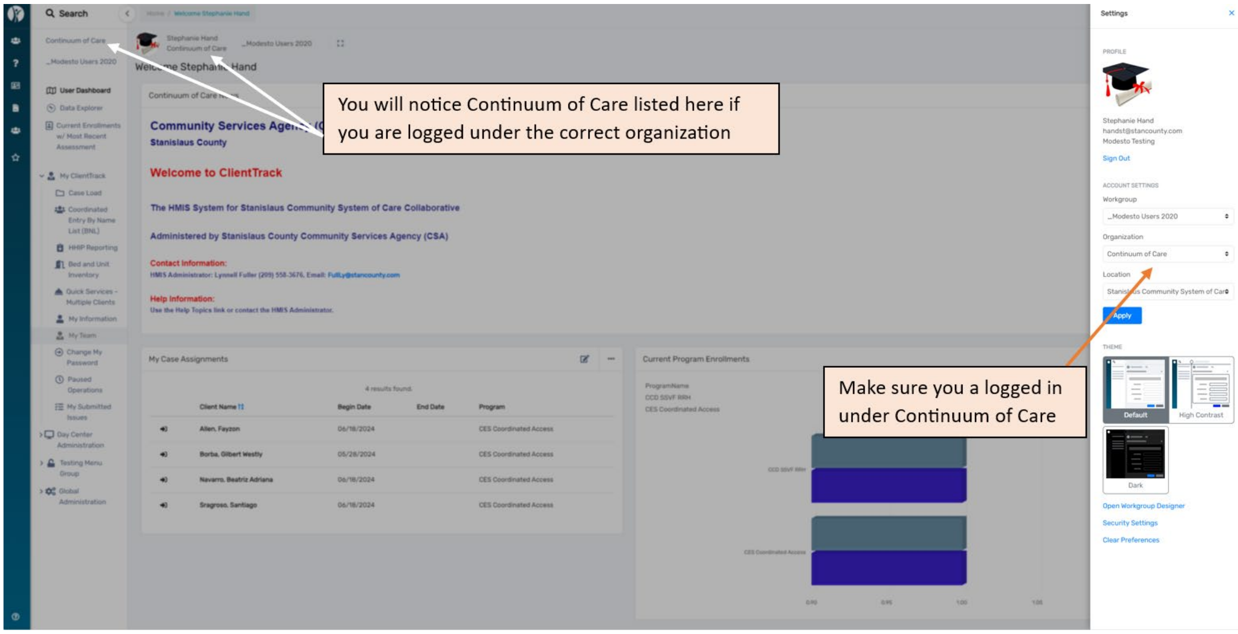
	Client Doesn't Know/Prefers Not to Answer	Information Missing	Data Issues	Total	% of Issue Rate
Name	0	0	0	0	0%
Social Security Number	2	0	2	4	3.28%
Date of Birth	0	0	0	0	0%
Race/Ethnicity	0	0	0	0	0%
Gender	0	0	0	0	0%
Overall Score	0	0	0	4	3.28%

New as of 10/1/2023.

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 **critical** that you make sure to change to the correct organization: **Continuum of Care** 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 DO NOT ENTER the client.



Client Data Entry

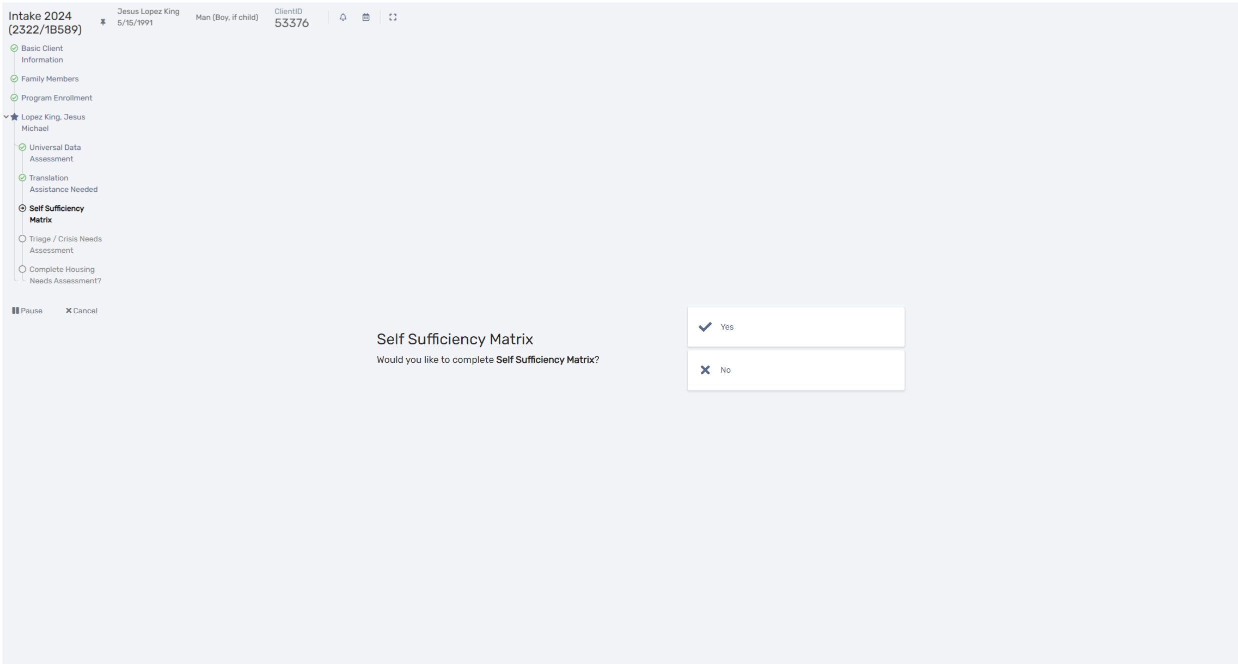
Refer to the [Entering Client Information and Managing Project Enrollments]() for a reminder on how to enter client data for an enrollment. **Note:** some data elements are not required for CES, therefore the workflows may appear differently. If you have any questions regarding what should and should 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.

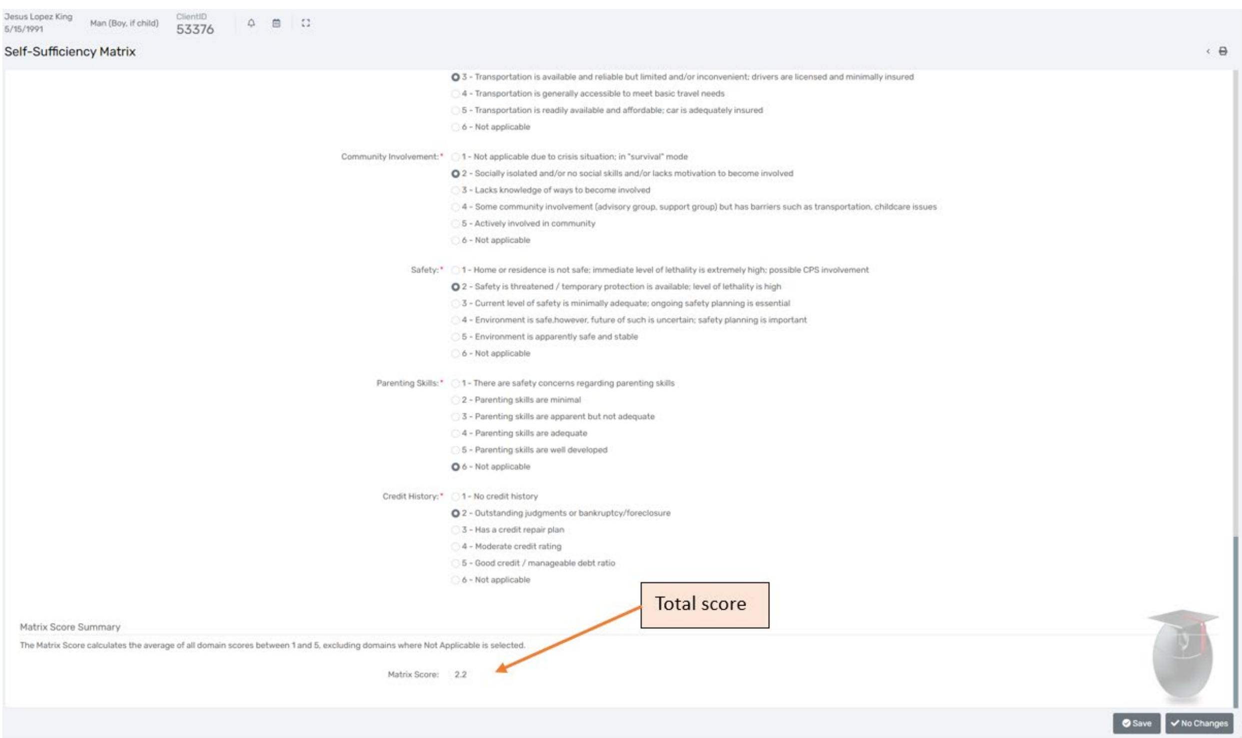
Self-Sufficiency Matrix

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.

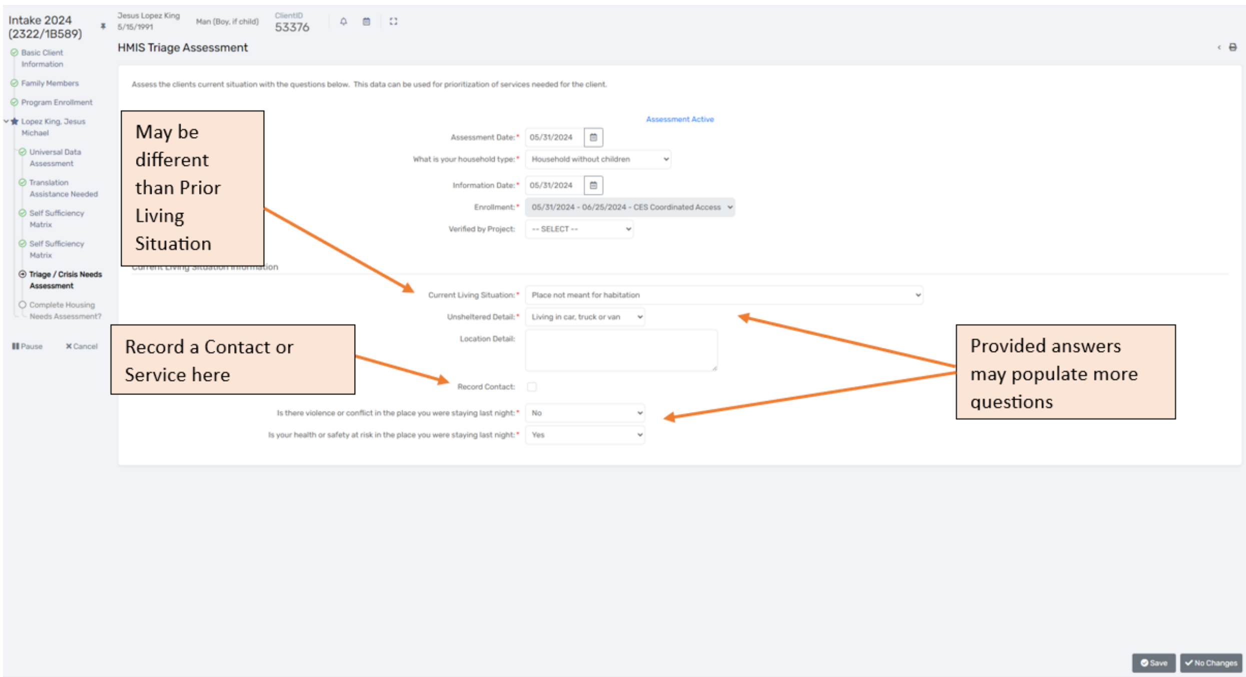


After completing the form, the system will automatically calculate the Matrix Score total.



HMIS Triage Assessment

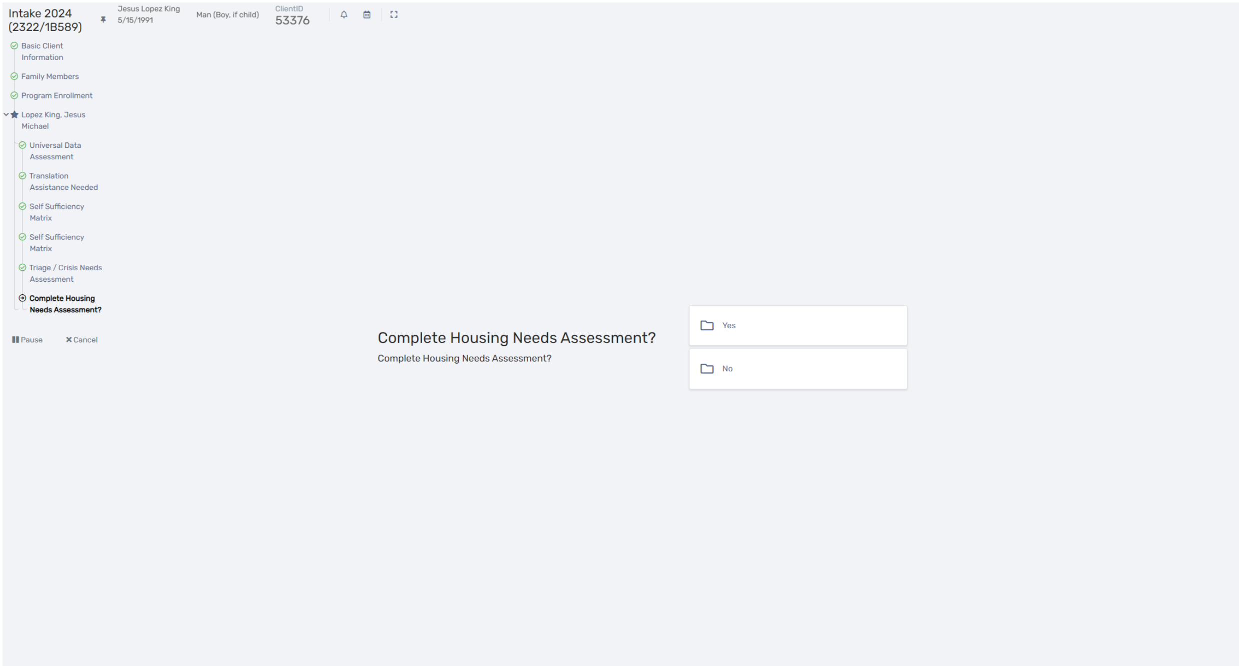
The HMIS Triage Assessment records the client's Current Living Situation, potential length of stay in their situation (contingent on the response), if there was conflict in their situation, and if their health or safety was at risk.



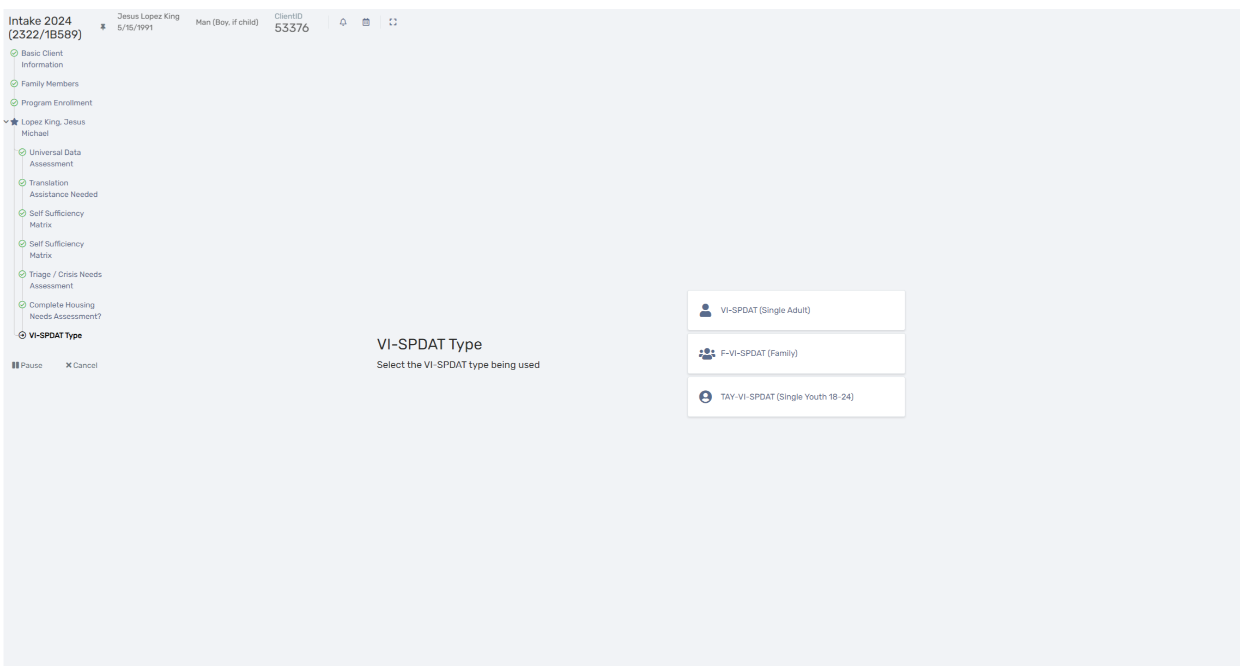
VI-SPDAT

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.

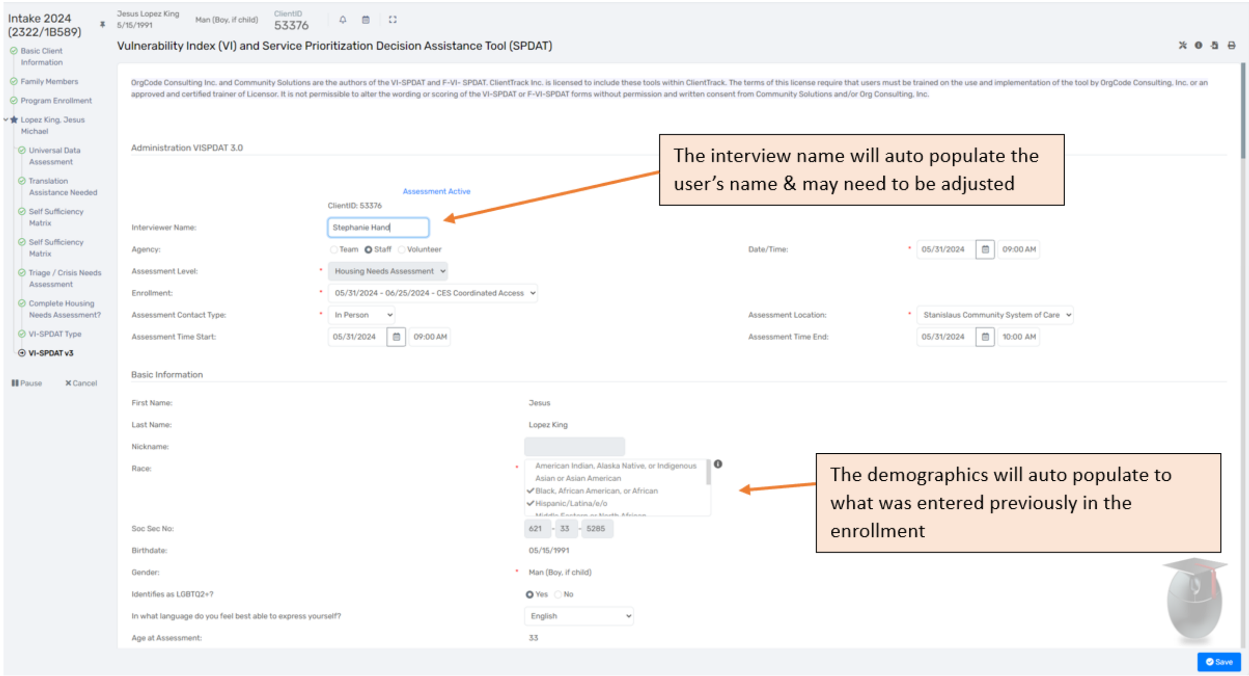
The workflow will ask you if you would like to complete the VI-SPDAT. Select Yes to complete the document. Selecting No will take you to the next assessment, the end of the workflow.



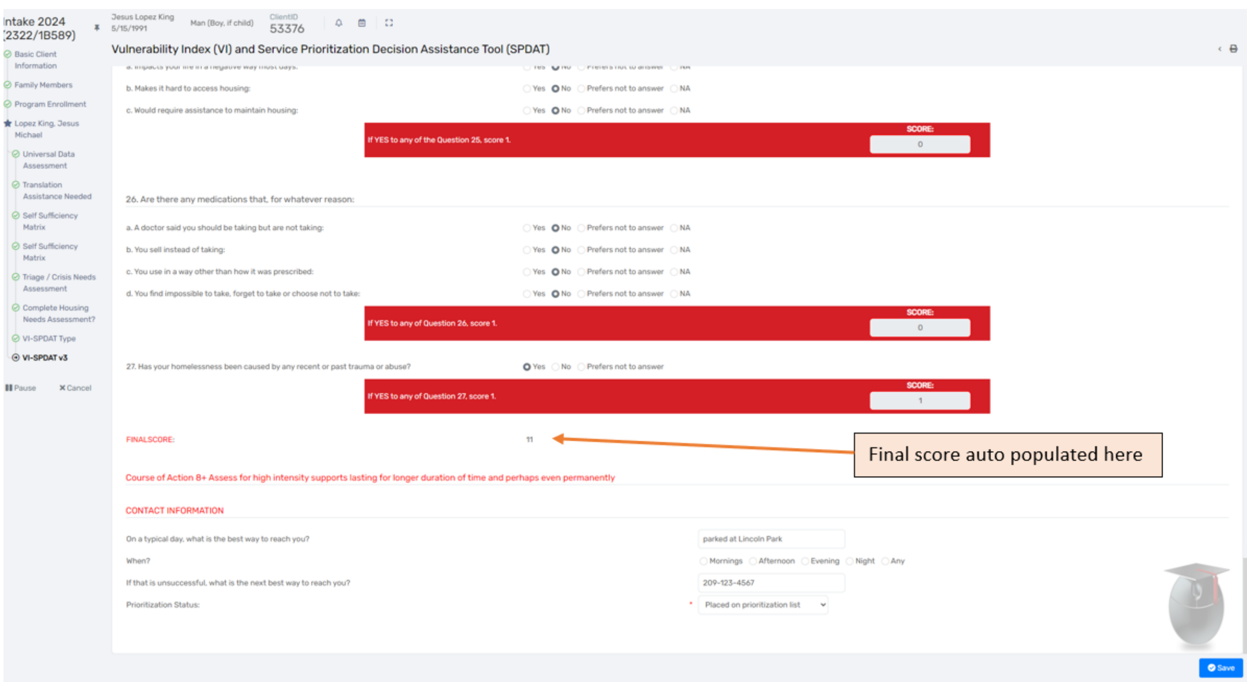
You will then be asked what type of VI-SPDAT you would like to complete for the client.



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.



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



Completing CES Intake Workflow

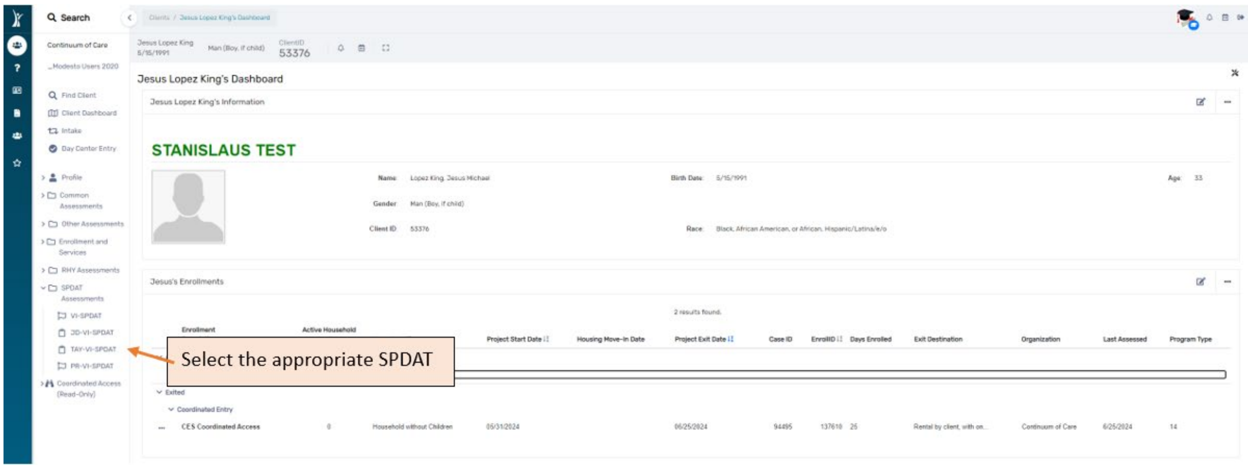
Once all the information is completed, you will see the Finish screen. It is important to select Finish to complete the workflow. Return to the Client's Dashboard and review the enrollment for accuracy. To review how to check the enrollment for accuracy, visit Complete Intake Workflow.

YOU HAVE COMPLETED YOUR ENROLLMENT!

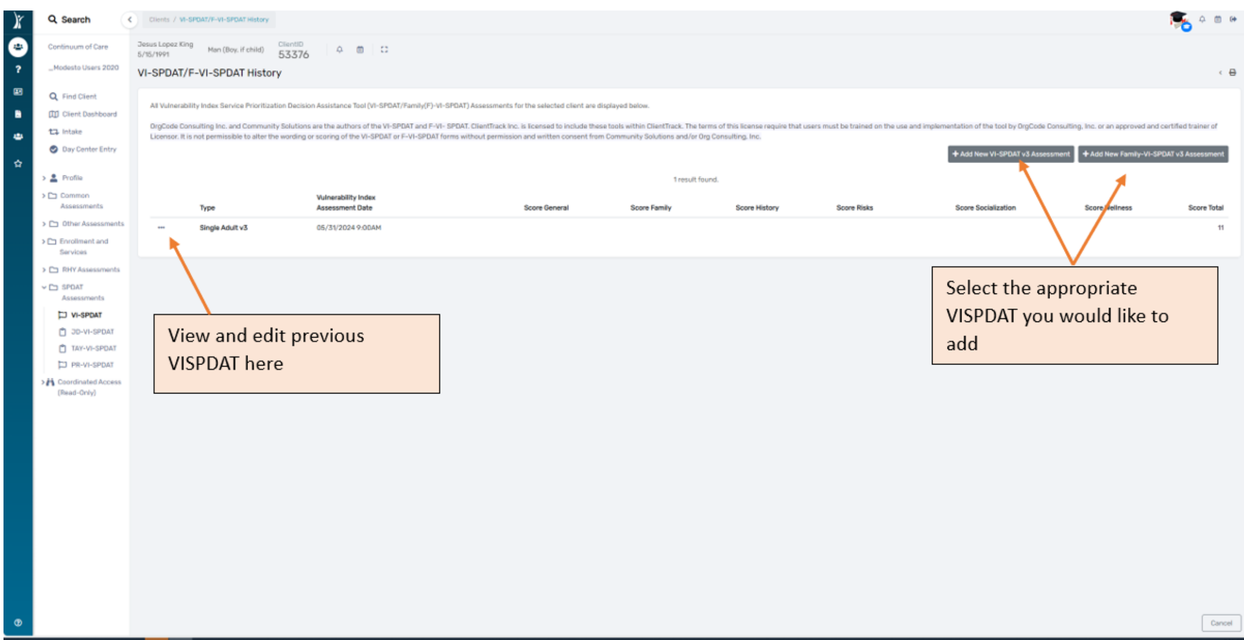
Entering an Updated VI-SPDAT or Self-Sufficiency Matrix

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.

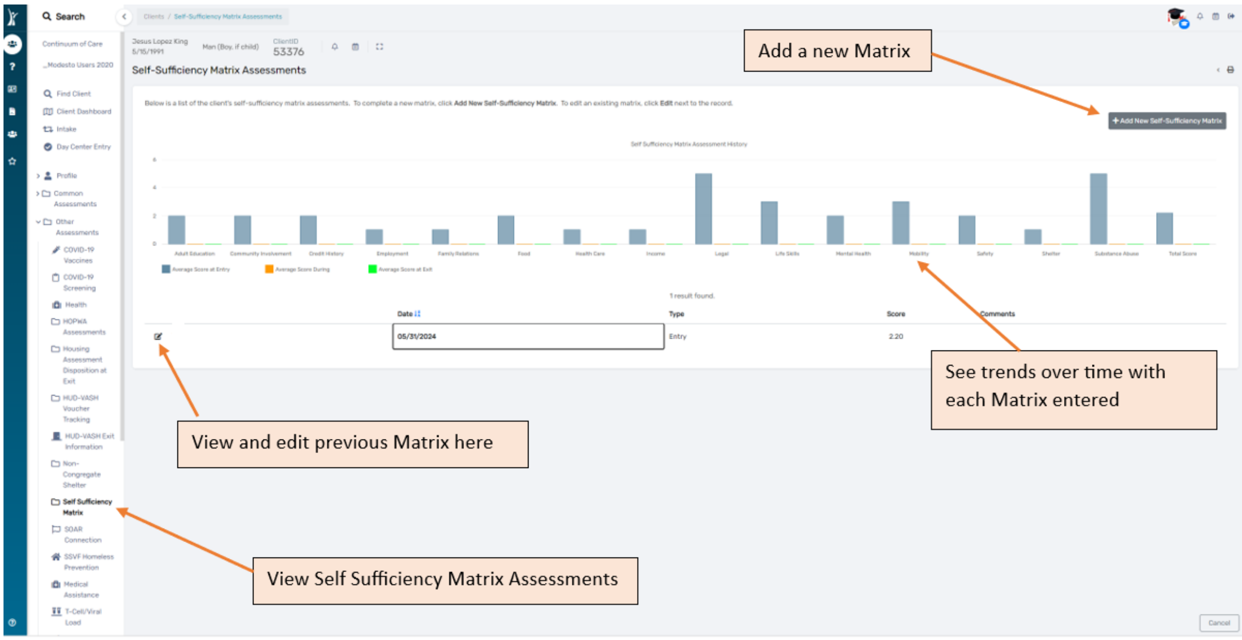


On this screen, you will be able to view and edit the previous VI-SPDAT and add a new one. **Note:** If you are adding a family VI-SPDAT, the enrollment size must be greater than one individual. The family VI-SPDAT must be added on the head of household.



Self Sufficiency Matrix

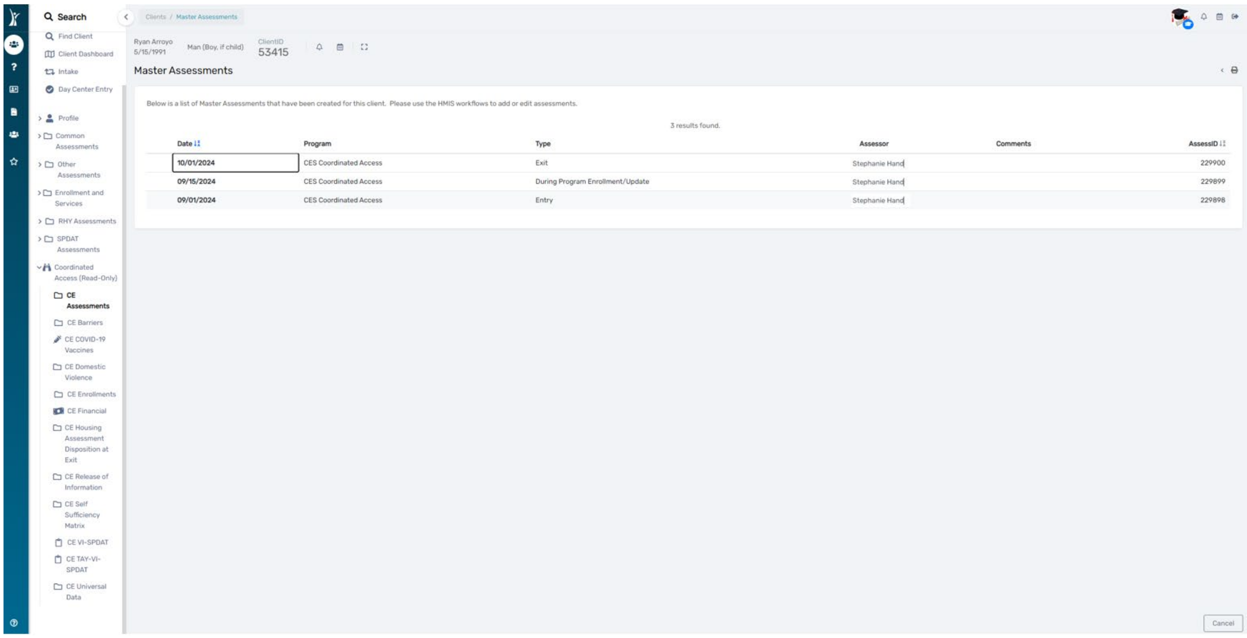
Start on the Client Dashboard and navigate to the Other Assessments folder on the left-hand side of the screen. Then select the Self Sufficiency Matrix folder.



Coordinated Access (Read-Only)

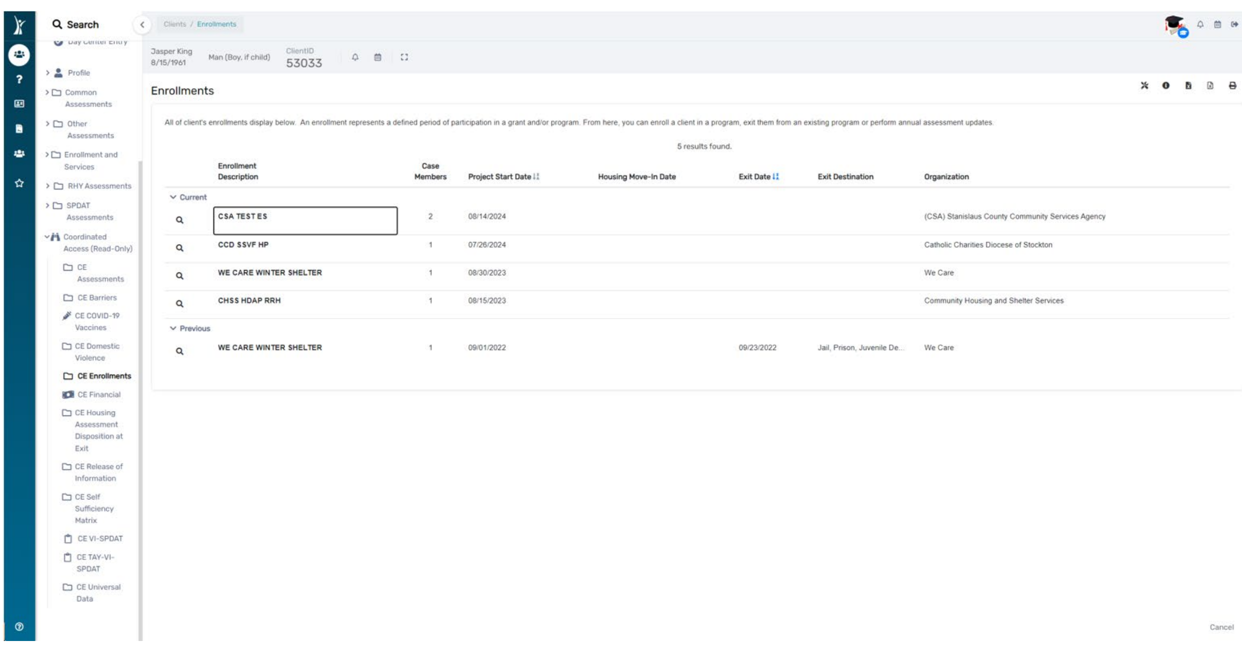
CE Assessments

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



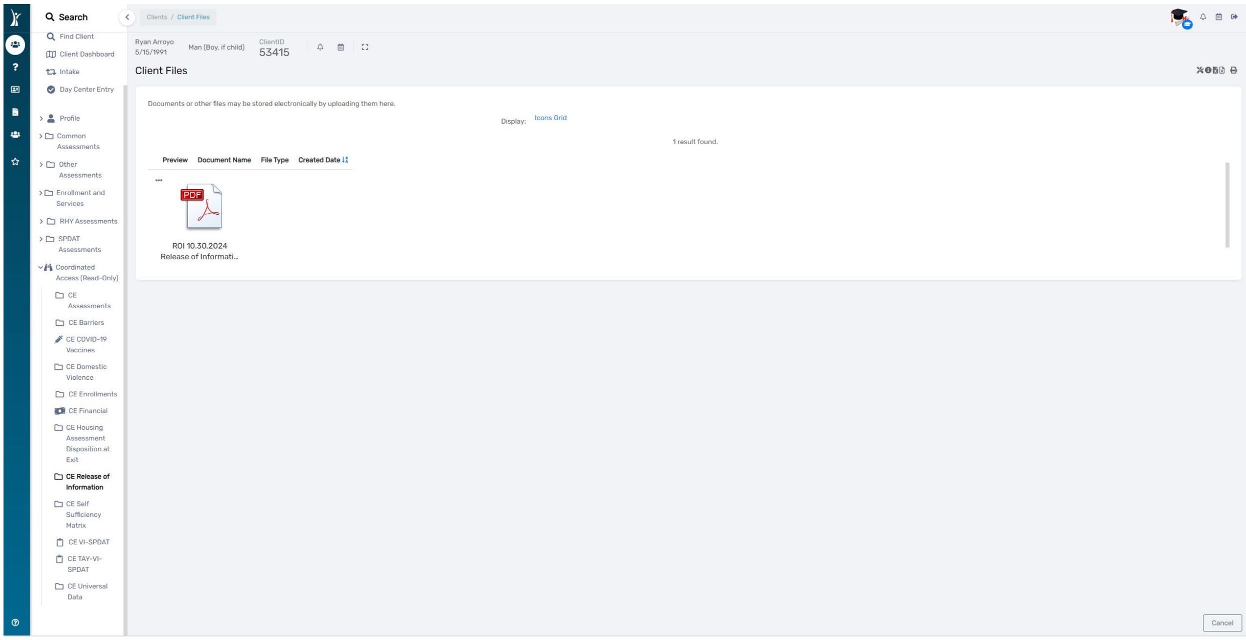
CE Enrollments

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.



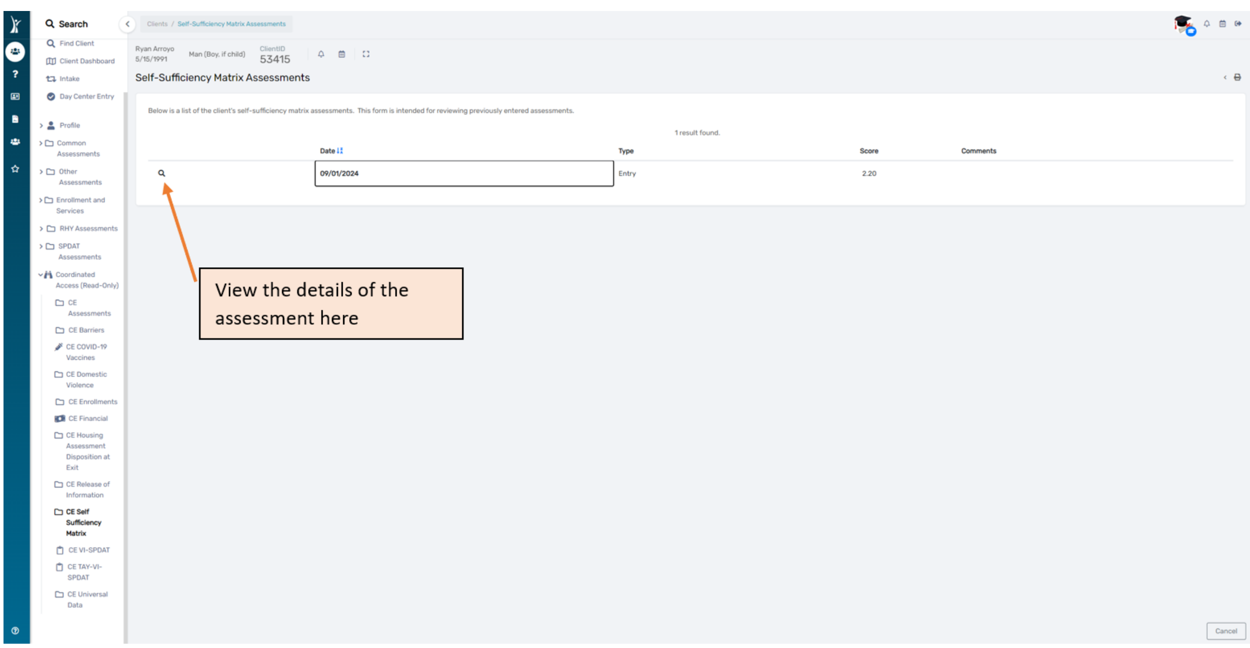
CE Release of Information (ROI)

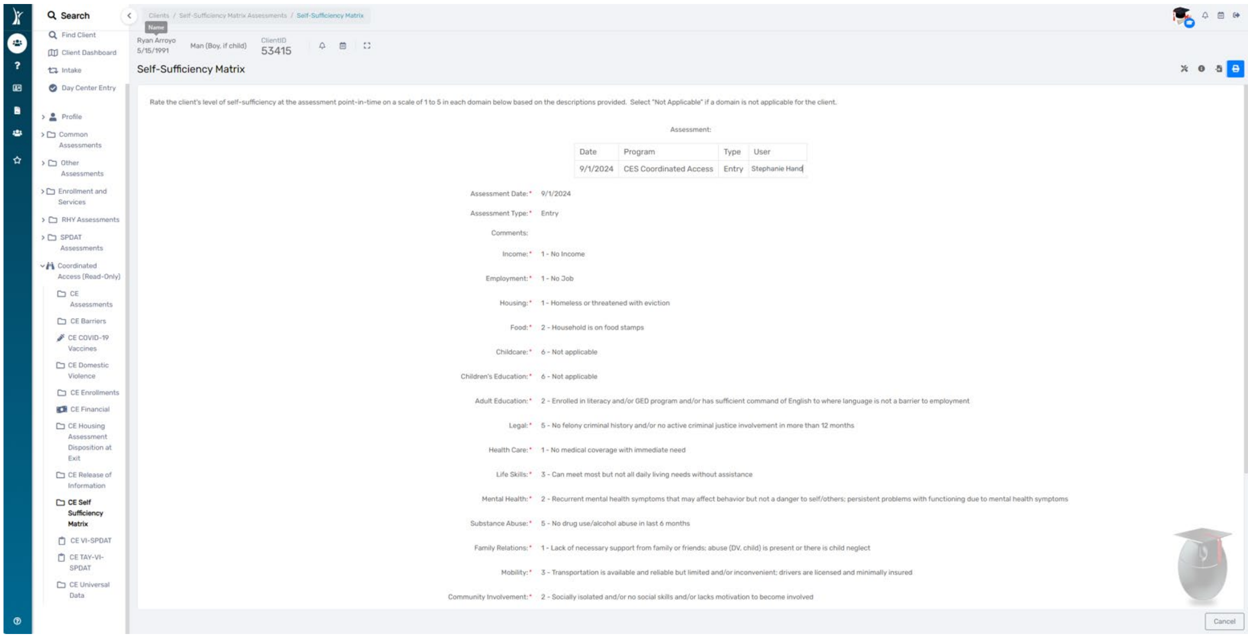
This screen allows the user to be directed to the Client Files page to view any uploaded ROIs.



CE Self Sufficiency Matrix

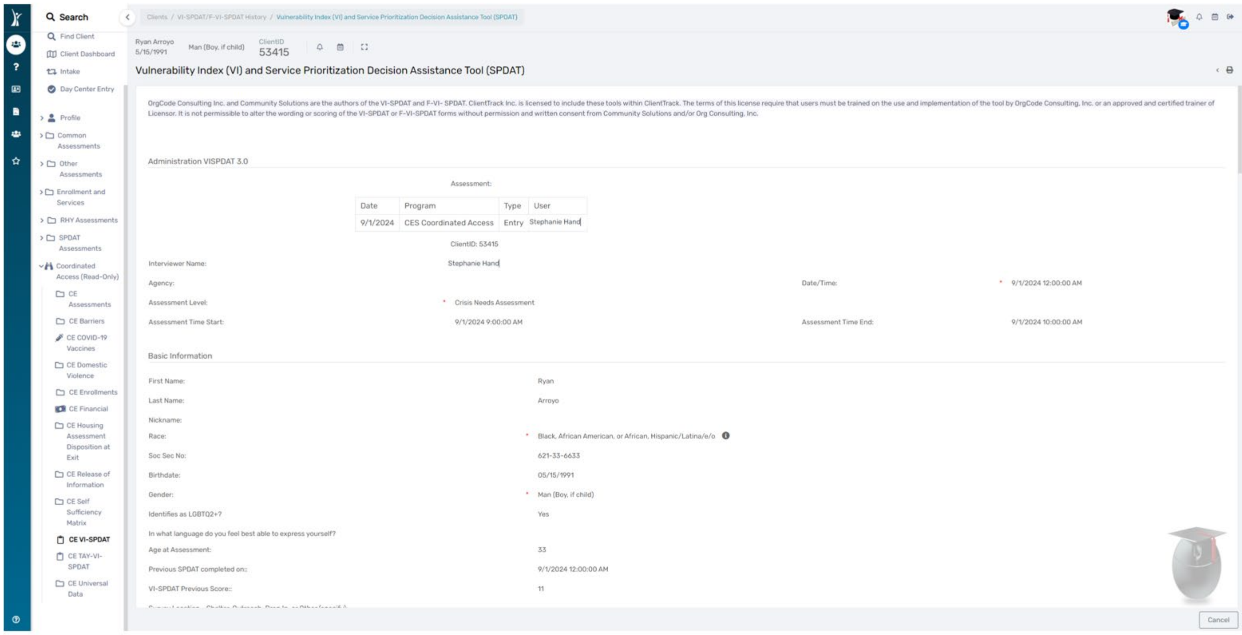
This screen allows the user to view all Self Sufficiency Matrix Assessments for clients. You may select the viewfinder button to view each recorded assessment.





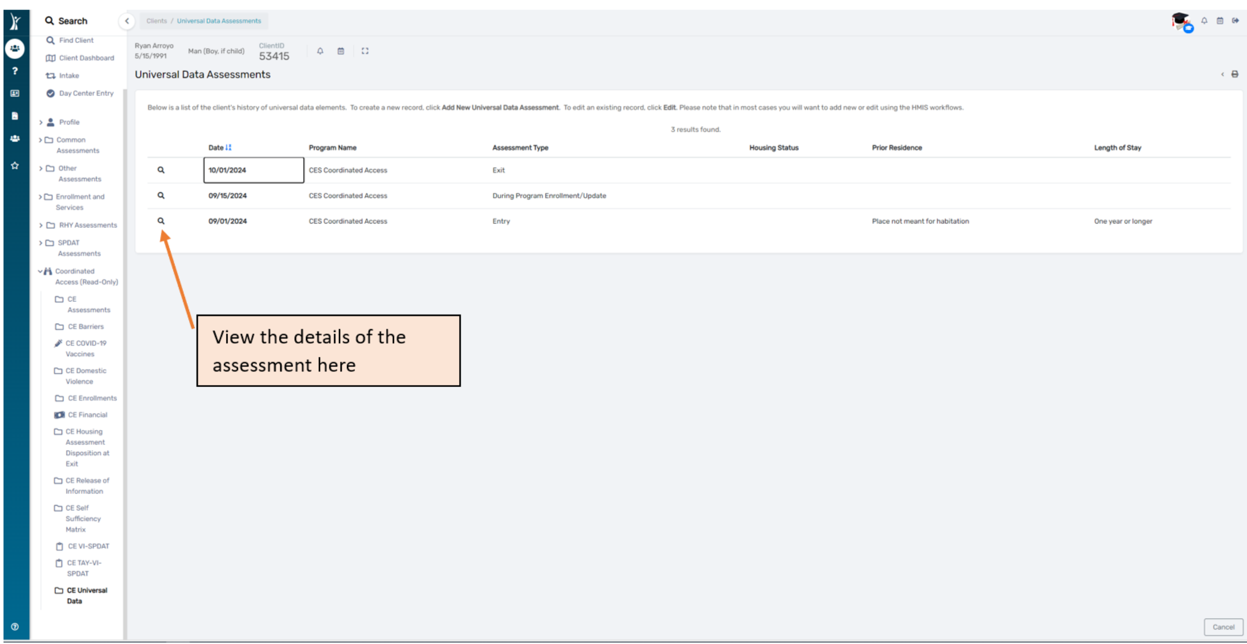
CE VI-SPDAT & CE TAY VI-SPDAT

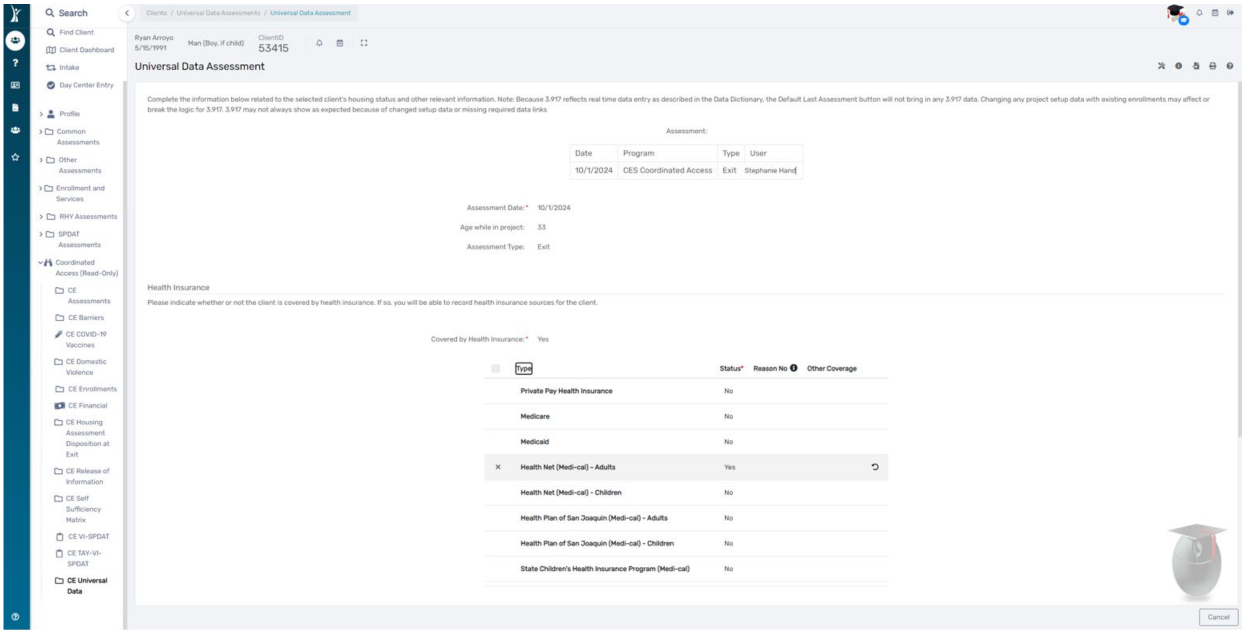
This screen allows the user to view all VI-SPDATs for clients. You may select the viewfinder button to view each recorded assessment. **Note:** CE VI-SPDAT will show Single Adult and Family VI-SPDATs. The Family VI-SPDAT will only show on the head of household. The CE TAY VI-SPDAT will show any recorded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



CE Universal Data

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



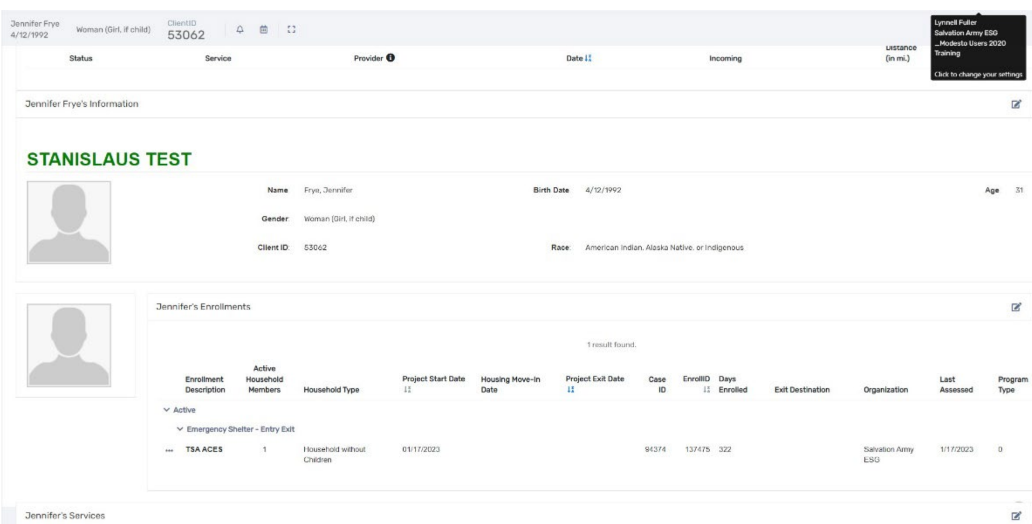


If the client is not enrolled in the CES Coordinated Access Project, you will not see any assessments listed in this section.

Logged into the Wrong Agency for CES Coordinated Access

Example: Logged in as Organization: **Salvation Army.**

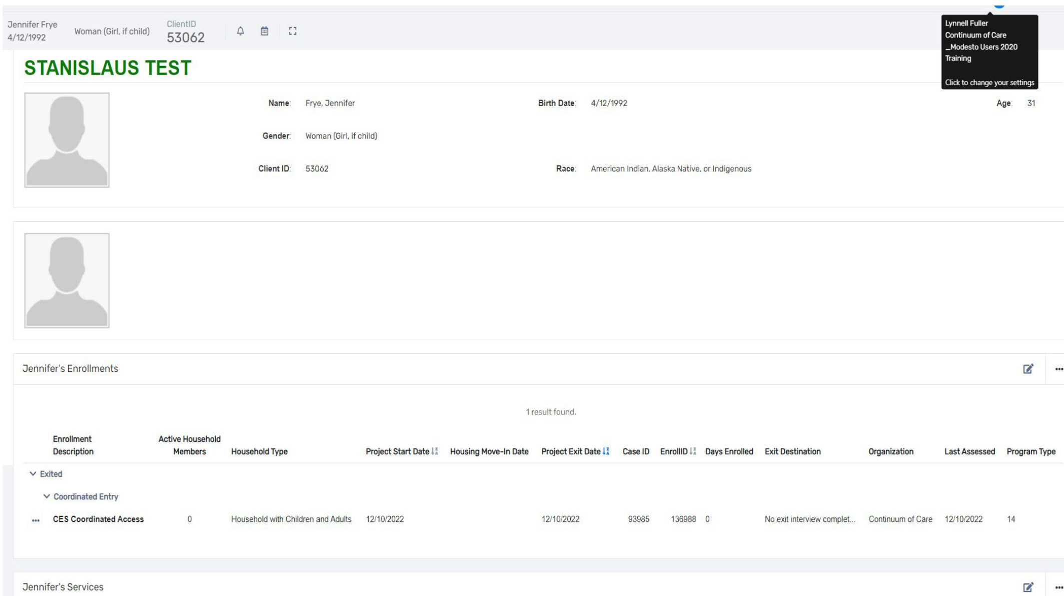
The CES Coordinated Access Enrollment will not be visible on the Client Dashboard.



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

Example: Logged in as Organization: **Continuum of Care**

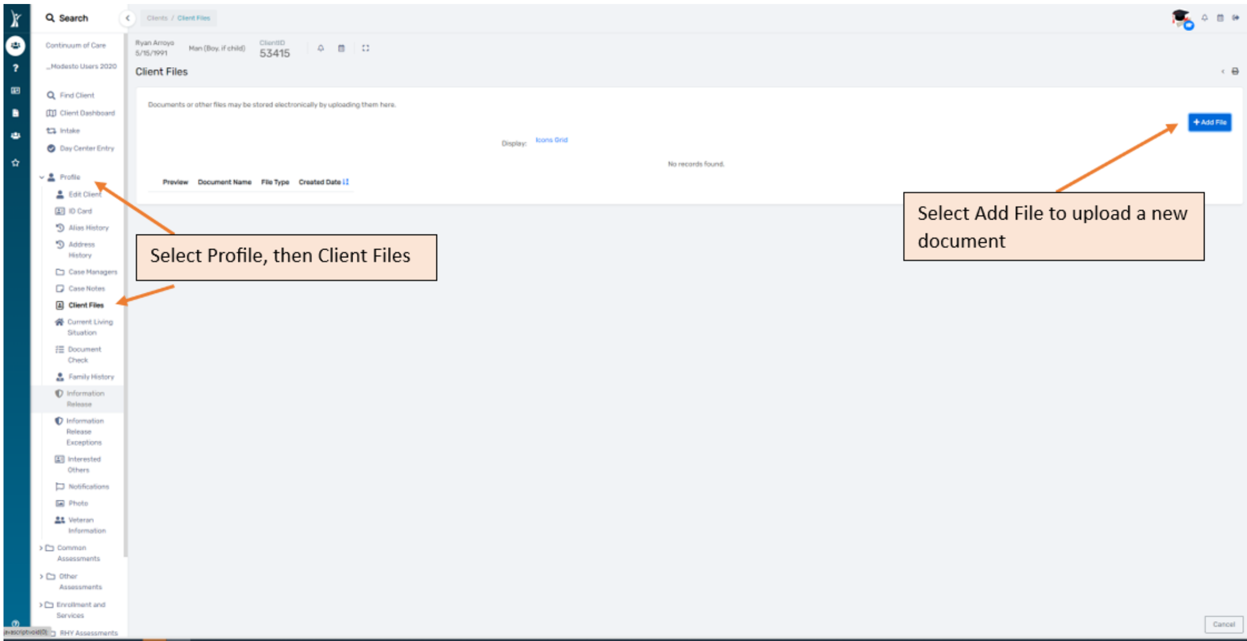
The CES Coordinated Access Enrollment is visible on the Client Dashboard.



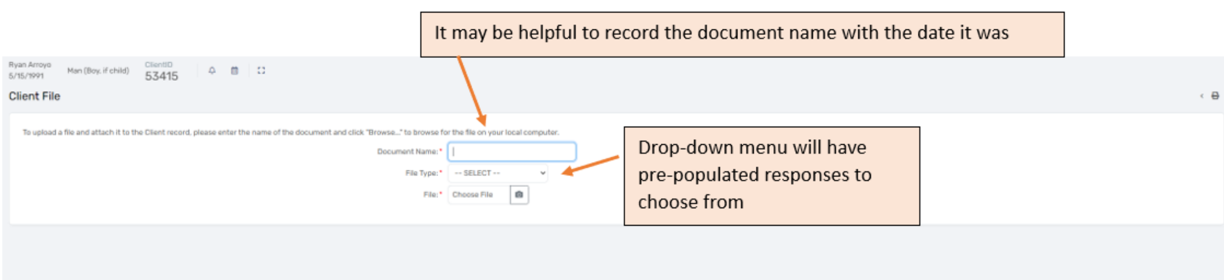
Note: If you create a client enrollment in your project under your agency and then in CES under Continuum of Care, you will be able to see both enrollments on the dashboard even if you are logged in under a different agency. This may make it difficult to realize any potential data quality errors. To 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

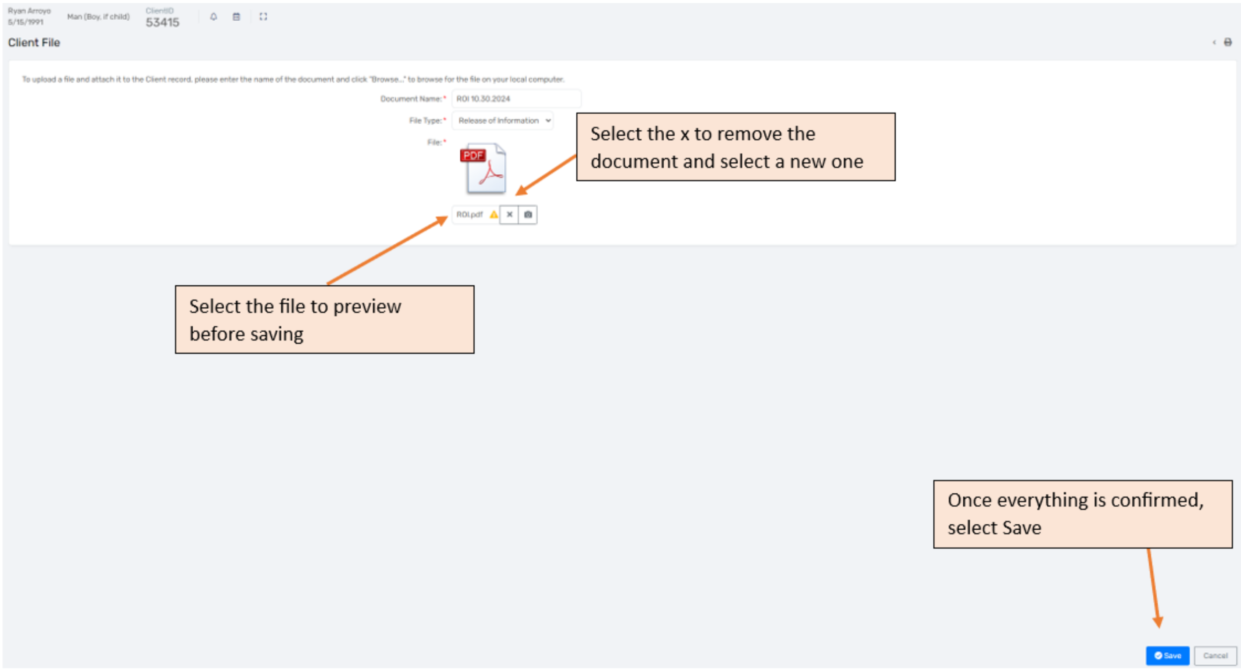
You must be logged into HMIS under Organization: Continuum of Care. Start on the Client Dashboard and navigate to the Profile folder on the left-hand side of the page. Select Client Files. Select Add File to add a new document. **Note:** if you are uploading a family VI-SPDAT, upload the document to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



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!



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.



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.