

# Stanislaus County Community System of Care

## HMIS User Data Entry Manual

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

Adopted: April 1, 2017

Amended: December 2024

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

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# Introduction

## Objectives

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

In this manual, the following information will be reviewed:

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

## Disclaimer

This guide does not exhaustively cover all uses and features of Stanislaus County HMIS ClientTrack. For questions beyond what is included in this guide, please refer to Eccovia University as an additional resource. You may also reach out to [HMIS@stancounty.com](mailto: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](mailto: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](mailto: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](#)

































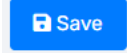
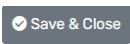
[FY 2024 HMIS Data Dictionary](#)

[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 **NOT PERMITTED!**



[www.clienttrack.eccovia.com/login/modesto](http://www.clienttrack.eccovia.com/login/modesto)

Sign in to Modesto


User Name

Password

[Did you forget your password?](#)

Settings ×

PROFILE



Stephanie Hand  
handst@stancounty.com  
Modesto Testing

[Sign Out](#)

ACCOUNT SETTINGS

Workgroup

...Modesto Users 2020 ▾

Organization

(CSA) Stanislaus County Community ▾

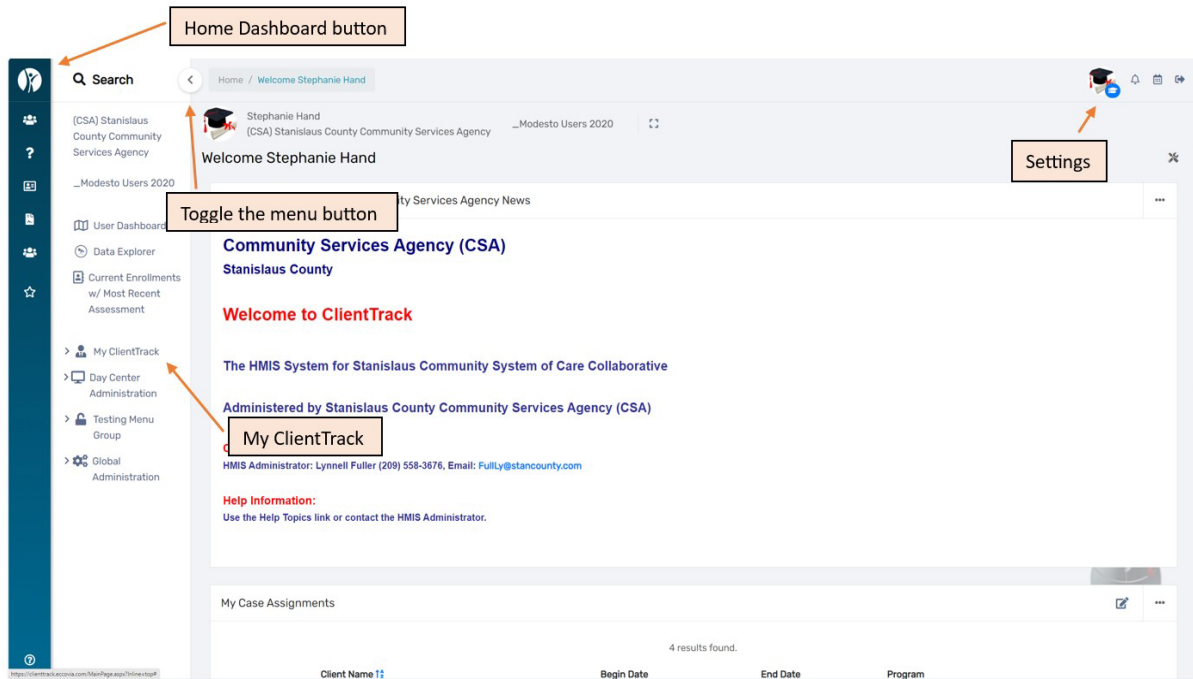
Location

CSA ▾

[Apply](#)

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

The screenshot displays the 'Client Dashboard' for Jasper King. The dashboard is titled 'Jasper King's Dashboard' and includes a search bar at the top. A callout box labeled 'Client Dashboard Options' points to the 'Client Dashboard' option in the left-hand navigation menu. The main content area is divided into three sections: 'Jasper King's Information', 'Jasper's Enrollments', and 'Jasper's Services'. The 'Jasper King's Information' section shows a profile picture and the following details: Name: King, Jasper James III; Birth Date: 8/15/1961; Age: 62; Gender: Man (Boy, if child); Client ID: 53033; Race: Asian or Asian American, Black, African American, or African. The 'Jasper's Enrollments' section shows 1 result found, with a table listing enrollment details. The 'Jasper's Services' section shows no records found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Emergency Shelter - Entry Exit	1	Household without Children	08/14/2024			94515	137637	0		(CSA) Stanislaus County Community Services Agency	8/14/2024	0

**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

The screenshot displays the Client Dashboard for Jasper King. The dashboard is divided into several sections:

- Client ID:** Located at the top right, showing the Client ID 53033.
- Client Demographic Information:** A section containing personal details: Name (King, Jasper James III), Birth Date (8/15/1961), Age (62), Gender (Man (Boy, if child)), Client ID (53033), and Race (Asian or Asian American, Black, African American, or African).
- Program Enrollments:** A table listing active enrollments. One enrollment is shown: CSA TEST ES, 1 household member, Household without Children, Project Start Date 08/14/2024, Case ID 94515, EnrollID 137637, Days Enrolled 0, Exit Destination (CSA) Stanislaus County Community Services Agency, Last Assessed 8/14/2024, and Program Type 0.
- Services:** A section at the bottom showing no records found.




















**Client ID:** ClientTrack’s identifier of each client. This number can be used as an identifier instead of using Personally Identifiable 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	 Add Household Member
 Associated Assessments	 Associated Assessments
 Exit the Enrollment	 Missed Annual/Update Assessment
 Edit Enrollment	 Edit Enrollment
 Edit Project Entry Workflow	 Edit Project Entry Workflow
 Edit Exit Workflow	 Edit Exit Workflow
 Link Assessments	 Link Assessments
 Review Entry Assessments	 Re Enter the Enrollment
 Update/Annual Assessment	 Review Entry Assessments
	 Review Exit Assessments

**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](mailto: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

Client Workspace & Find Client

It is best practice to use minimal information to search for a client (first couple letters of names, last 4 digits of SSN, DOB).

Search for client

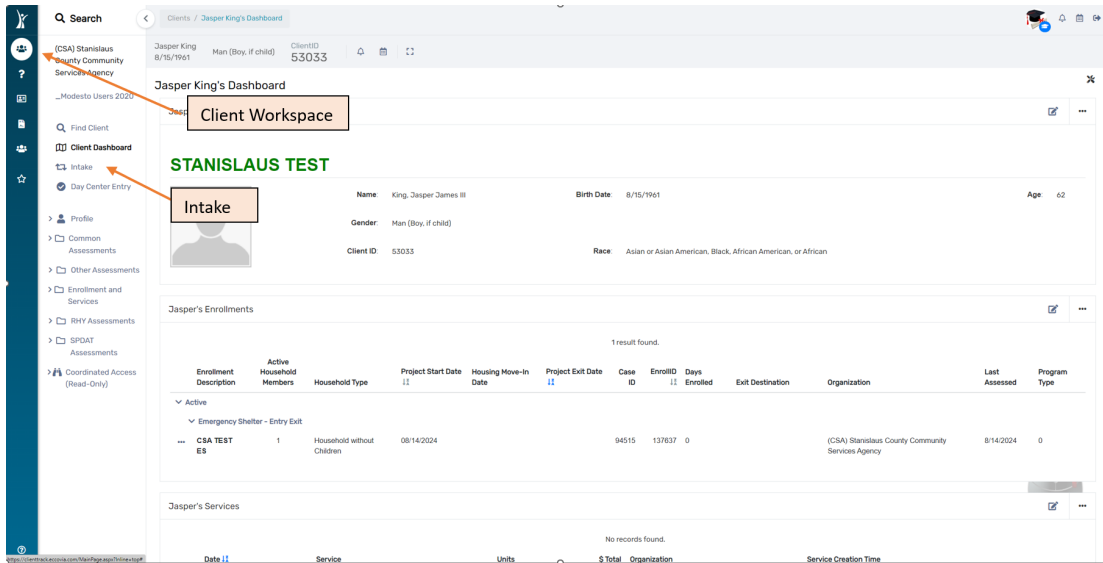
First Name	Last Name	Middle Name	SSN	Birth Date
Jasper	King	James	439-15-3233	
James	Kinser		611-58-7594	

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.

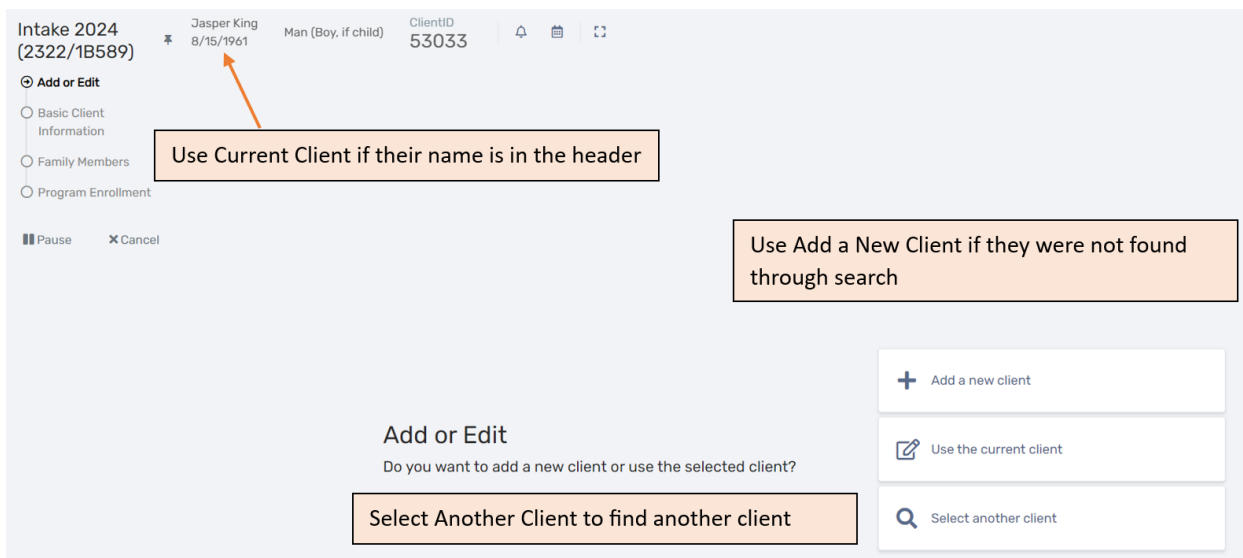
## Enter Client Information and Manage Project Enrollments

### Start an Intake

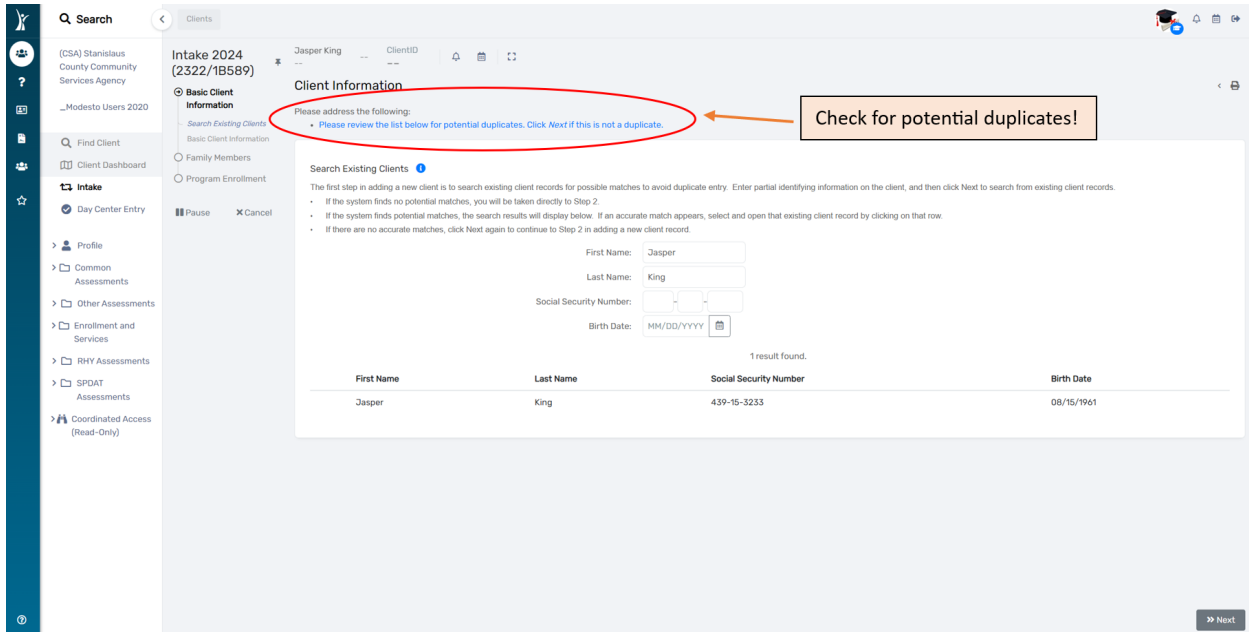
Navigate to the Client Workspace and select Intake.



Select the appropriate option to continue with the Intake.

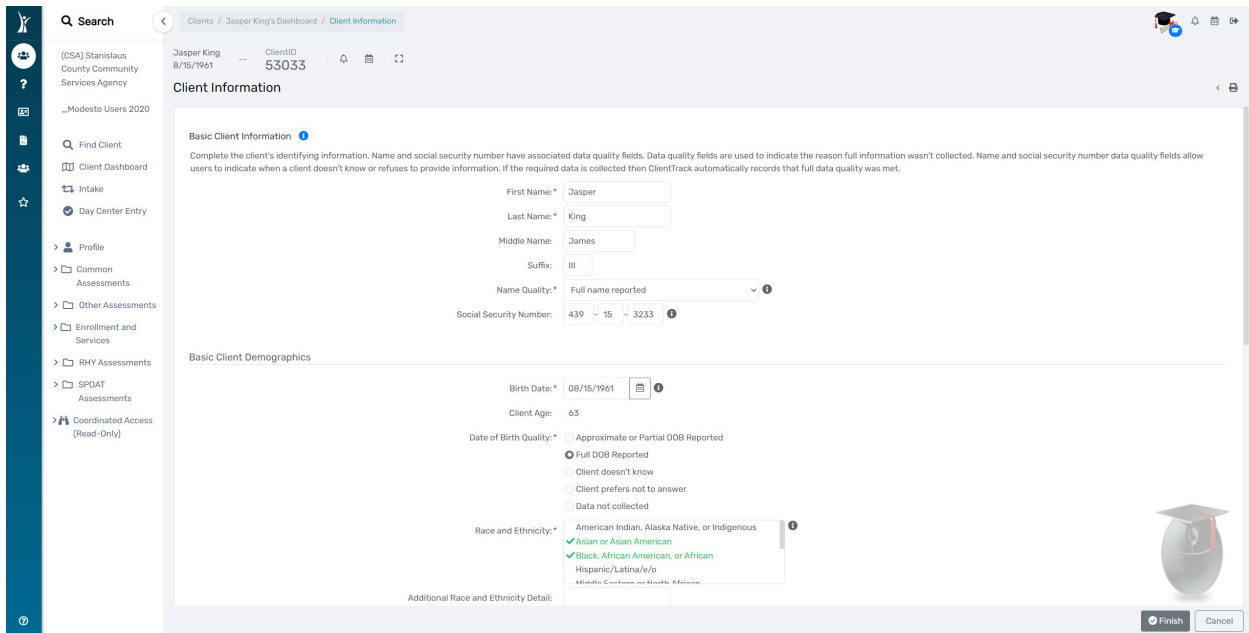


If you select Add a New Client. You will be prompted to enter First Name, Last Name, Social Security Number, and Birthdate. The system will provide an additional warning if it detects any potential duplicates. Verify your client's information does not match an existing client. If the name does not match,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

The screenshot shows a web application interface for client information. The top navigation bar includes a search bar and the breadcrumb "Clients / Jasper King's Dashboard / Client Information". The main content area is titled "Client Information" and displays the following fields:

- Client Information:** Jasper King, Client ID 53033, DOB 8/15/1961.
- Gender:** A dropdown menu is open, showing options: "Woman (Girl, if child)", "Man (Boy, if child)", "Culturally Specific Identity (e.g., Two-Spirit)", "Transgender", and "Non-Binary".
- Veteran Status:** No
- Veteran Assistance Verification:** -- SELECT --
- Mailing Address and Contact Information:** Enter the address where the client is currently able to receive mail. **Mailing Address** includes, but not limited to, service organizations, access centers, emergency shelter, transitional housing, client residence.
  - Address: 320 9th St.
  - Address 2:
  - City, State, Zip Code: Modesto, CA, 95354
  - Email:
  - Main Phone: 209-401-5006
  - Message Phone: 209-654-1988
- Family Information:** Use this section to collect data about a client's family. The Family search field allows you to search for and select an existing family account. This is appropriate when adding a family member to an existing family.
  - Family: King, Jasper - 1961
  - Relationship to Head of Household: Self
  - Begin Date: 07/26/2024
  - End Date: MM/DD/YYYY

At the bottom right, there are "Finish" and "Cancel" buttons.

**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 screenshot shows the 'Family Members' screen for a client named Jasper King. The table displays the following information:

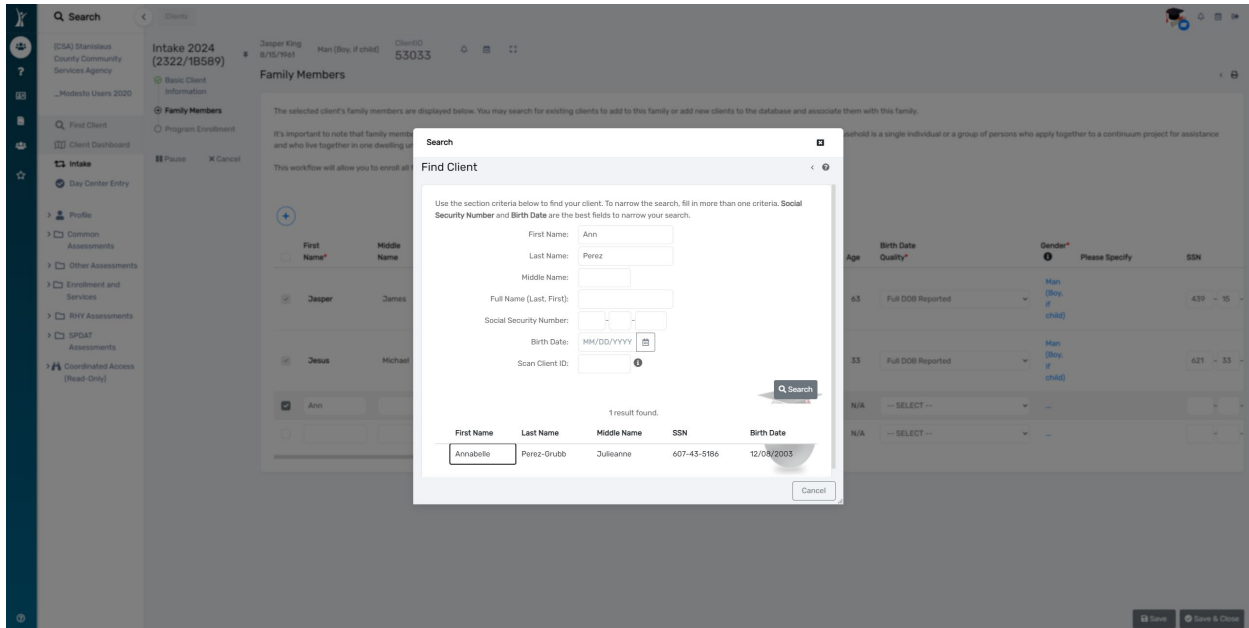
First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date*††	Age	Birth Date Quality*	Gender*	Please Specify	SSN
<input checked="" type="checkbox"/>	Jasper	James	King	Full name reported	08/15/1961	63	Full DOB Reported	Man (Boy, if child)		439 - 15
<input checked="" type="checkbox"/>	Jesus	Michael	Lopez King	Full name reported	05/15/1991	33	Full DOB Reported	Man (Boy, if child)		421 - 33
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	--SELECT--	MM/DD/YYYY	N/A	--SELECT--			

Two callout boxes provide instructions:

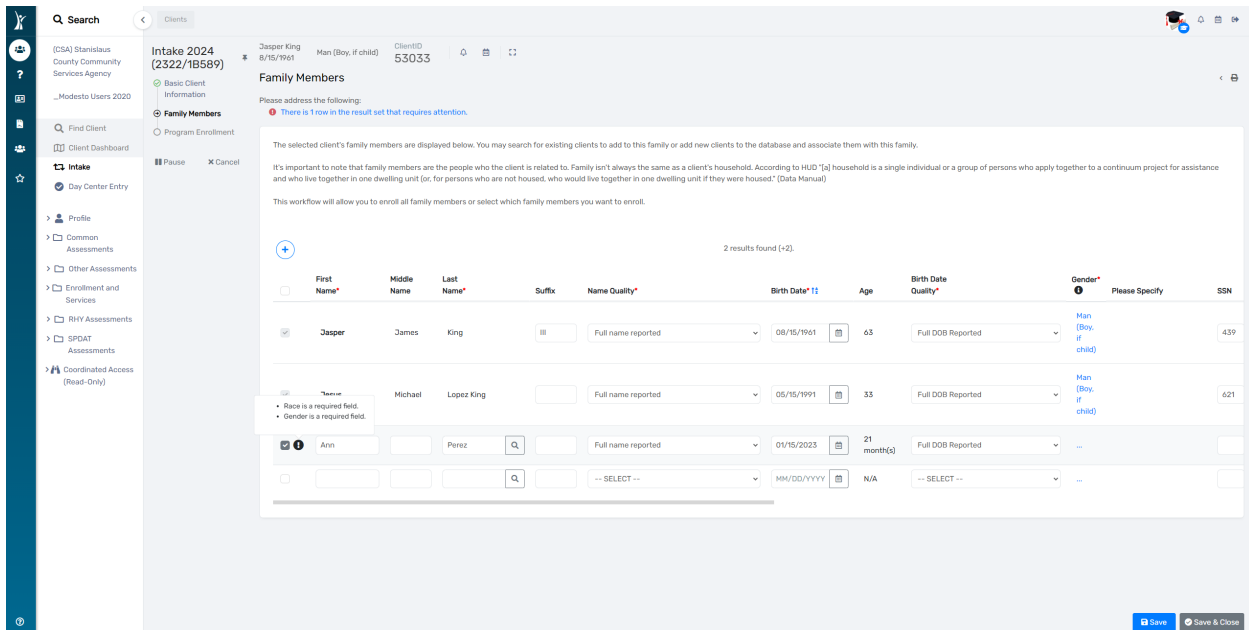
- Make sure to scroll over to complete all information (pointing to the search icon in the first name field of the empty row).
- Select the three dots to complete this information (pointing to the three dots in the Gender column of the empty row).

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.

**Jasper King's Dashboard**

Jasper King's Information

**STANISLAUS TEST**

Name: King, Jasper James III      Birth Date: 8/15/1961      Age: 63  
 Gender: Man (Boy, if child)  
 Client ID: 53033      Race: Asian or Asian American, Black, African American, or African

Jasper's Enrollments

1 result found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Emergency Shelter - Entry Exit	1	Household without Children	08/14/2024			94515	137637	2		(CSA) Stanislaus County Community Services Agency	8/14/2024	0

Buttons: Add Household Member, Associated Assessments, Exit the Enrollment, Edit Enrollment, Edit Project Entry Workflow, Link Assessments, Review Entry Assessments, Update/Annual Assessment, Delete Enrollment.

Jasper's Services

1 result found.

Service	Units	\$ Total	Organization	Service Creation Time
Shelter Night	1.00	\$0.00	(CSA) Stanislaus County Community Services Agency	08/16/2024 2:18PM

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.

**Add Family Member**

Family Members

The selected client's family members are displayed below. You may search for existing clients to add to this family or add new clients to the database and associate them with this family.

It's important to note that family members are the people who the client is related to. Family isn't always the same as a client's household. According to HUD [a] household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed). (Data Manual)

This workflow will allow you to enroll all family members or select which family members you want to enroll.

2 results found (+1).

First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date* 11	Age	Birth Date Quality*	Gender*	Please Specify	SSN
Jasper	James	King	III	Full name reported	08/15/1961	63	Full DOB Reported	Man (Boy, if child)		439 - 15
Jesus	Michael	Lopez King		Full name reported	05/15/1991	33	Full DOB Reported	Man (Boy, if child)		621 - 33
				-- SELECT --	MM/DD/YYYY	N/A	-- SELECT --			

Select the magnified glass to search for an existing client.

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

HUD Program Enrollment

Select the Project you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling.

The Project Start Date is:

- For **Street Outreach** projects – it is the date of first contact with the client.
- For **Emergency Shelters** – it is the night the client first stayed in the shelter for the consecutive shelter period from entry to exit. Night by night shelters, which use a bed-night tracking method will have a project start date and will allow clients to re-enter as necessary without "exiting and restarting" for each stay for a specified period.
- For **Safe Havens and Transitional Housing** – it is the date the client moves into the residential project (i.e. first night in residence).
- For all types of **Permanent Housing**, including **Rapid Re-Housing** – it is the date following application that the client was admitted into the project. To be admitted indicates the following factors have been met:
  - Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify – though all documentation may not yet have been gathered)
  - The client has indicated they want to be housed in this project
  - The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time
- For all other types of Service projects including but not limited to services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

Project: CSA TEST ES

Household

Excerpt from the *HHS Data Standards Manual*: "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

<input type="checkbox"/>	Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*
<input type="checkbox"/>	King, Jasper James III	Man (Boy, if child)	63	08/14/2024	MM/DD/YYYY	Stephanie Hand	Self
<input checked="" type="checkbox"/>	Lopez King, Jesus Michael	Man (Boy, if child)	33	08/14/2024	MM/DD/YYYY	Stephanie Hand	Son

Family Members listed without a grey check mark will NOT be enrolled in the project

Save No Changes

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



(CSA) Stanislaus County Community Services Agency  
 Add Family Member  
 Jesus Lopez King (Boy, if child) ClientID 53376  
 Universal Data Assessment (FY24)

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links

Assessment Date: 08/14/2024  
 Age at Assessment: 33  
 Assessment Type: Entry  
 Assessor: Stephanie Hand  
 Program: CSA TEST ES  
 Disabling Condition: Yes

**Living Situation**  
 Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.

Prior Living Situation: Hospital or other residential non-psychiatric medical facility  
 Length of stay in prior living situation: Two to six nights  
 Approximate date this episode of homelessness started: 08/01/2024  
 Regardless of where they stayed last night—Number of times the client has been on the streets, in ES, or SH in the past three years including today: One time  
 Total number of months homeless on the street, in ES, or SH in the past three years: One month (this time is the first month)

**Health Insurance**  
 Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Covered by Health Insurance: Yes

Save

## Project Enrollment

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

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

**If you do not find your project, cancel your workflow and contact HMIS!**

**Select your project and 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.

**Mark the check boxes for the household members you would like to enroll in your project.**

**The project start date will always auto-populate as today's date. If the enrollment was on a different date, it is important this is changed to the information date.**

<input type="checkbox"/>	Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*
<input checked="" type="checkbox"/>	King, Jasper James III	Man (Boy, if child)	63	10/24/2024	MM/DD/YYYY	Stephanie Hand	Self
<input type="checkbox"/>	Lopez King, Jesus Michael	Man (Boy, if child)	33	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --

## HMIS Universal Data Assessment

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

### Universal Data Assessment (FY24)

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links

**Default Client's Last Assessment** ⓘ

Assessment Date: \* 08/14/2024 📅

Age at Assessment: 33

Assessment Type: \* Entry ▾

Assessor: \* Stephanie Hand 🔍

Program: CSA TEST ES ▾

Disabling Condition: \* Yes ▾

---

**Living Situation**

Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.

Prior Living Situation: \* Hospital or other residential non-psychiatric medical facility ⓘ ▾

Length of stay in prior living situation: \* Two to six nights ▾

Approximate date this episode of homelessness started: \* 08/01/2024 📅 ⓘ

Regardless of where they stayed last night—Number of times the client has been on the streets, in ES, or SH in the past three years including today: \* One time ▾

Total number of months homeless on the street, in ES, or SH in the past three years: \* One month (this time is the first month) ▾

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

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

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

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

## Health Insurance

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

## Health Insurance

Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Default Last Insurance Status

Covered by Health Insurance: Yes

Type	Status	Reason No 1	Other Coverage
Private Pay Health Insurance	No	-- SELECT --	
Medicare	No	-- SELECT --	
Medicaid	No	-- SELECT --	
State Children's Health Insurance Program S-CHIP	No	-- SELECT --	
Veteran's Administration (VA) Medical Services	No	-- SELECT --	
Employer-Provided Health	No	-- SELECT --	
Health Insurance obtained through COBRA	No	-- SELECT --	
Other Public	No	-- SELECT --	
State Funded Insurance for Adults (Medica)	Yes		

Selecting the box will auto select No for every response

## 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.**

Barriers

Use this form to identify whether a client has each individual barrier or not. The Client's last assessment is displayed as a default. You may, optionally, click [Previous Barriers Detail](#) to view information about the defaulted records or click [View Barrier History](#) to review all previous barriers.

Identified Date: 08/14/2024

Screen: Special Needs

Disabling Condition: Yes

Barrier ID	Barrier	Barrier Present*	Condition is Indefinite	Explanation	Previous Barrier Details
<input type="checkbox"/>	Alcohol Use Disorder	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/>	Chronic Health Condition	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/>	Developmental Disability	Yes			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/>	Drug Use Disorder	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/>	HIV/AIDS	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/>	Mental Health Disorder	Yes	Yes		<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/>	Physical Disability	No			<a href="#">Previous Barrier</a>

Selecting the box will auto select No for every response

An explanation can be entered but is not required

If a barrier is indefinite, disabling condition must be marked Yes

## Domestic Violence Assessment

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

Domestic Violence Assessment

If the client is a survivor of domestic violence, select Yes for Survivor of Domestic Violence, and select when the experience occurred.

Assessment Date: 08/14/2024 Assessment Active

Survivor of Domestic Violence:  Yes  
 No  
 Client Doesn't Know  
 Client prefers not to answer  
 Data Not Collected

When Experience Occurred: Within the past three months

Currently Fleeing: Yes

The questions will auto populate if Yes is selected.

## Financial Assessment

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

Assessment Date: 08/14/2024 Assessment Active

Income from Any Source:  Yes  
 Non-Cash Benefits from Any Source:  Yes  
 Expenses: -- SELECT --

The type of income will only show if Yes is selected

If selected, an amount must be recorded!

A description of the income can be added but is not required. Can be used to describe children’s income

No Financial Resources should not be selected if Yes for income is selected

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Earned Income		\$1,000.00
<input type="checkbox"/> Unemployment Insurance		
<input checked="" type="checkbox"/> Social Security Insurance		
<input type="checkbox"/> Supplemental Security Income		
<input checked="" type="checkbox"/> Social Security Disability Income	Tummy \$300	\$300.00
<input type="checkbox"/> Private Disability Insurance		
<input type="checkbox"/> Worker's Compensation		
<input type="checkbox"/> VA Service-Connected Disability Compensation		
<input type="checkbox"/> VA Non-Service-Connected Disability Pension		
<input type="checkbox"/> Pension or retirement income from a previous job		
<input type="checkbox"/> TANF		
<input type="checkbox"/> General Assistance		
<input type="checkbox"/> Retirement (Social Security)		
<input type="checkbox"/> Child Support		
<input type="checkbox"/> Alimony		
<input type="checkbox"/> Other Income		
<input type="checkbox"/> No Financial Resources		

## Translation Assistance

Complete the required information.

Michael Barker  
6/21/1985    Man (Boy, if child)    ClientID  
53404

Translation Assistance Assessment

Select the appropriate translation assistance needed option at the time of assessment. If the client needs translation assistance, record the preferred languages below. Specify other if applicable.

Default Client's Last Assessment ⓘ

Assessment Active

Assessment Date: 10/01/2024

Translation Assistance Needed: No

Save    No Changes

## Universal Data Assessment for Child

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

## Universal Data Assessment (FY24)

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. CH enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links

Default Client's Last Assessment ⓘ

Assessment Date: 08/14/2024 🗓️

Age at Assessment: 1

Assessment Type: Entry ▾

Assessor: Stephanie Hand 🔍

Program: CSA TEST ES ▾

Disabling Condition: No ▾

### Health Insurance

Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Default Last Insurance Status

Covered by Health Insurance: Yes ▾

<input checked="" type="checkbox"/>	Type	Status	Reason No ⓘ	Other Coverage
<input checked="" type="checkbox"/>	Private Pay Health Insurance	No ▾	-- SELECT -- ▾	🔄
<input checked="" type="checkbox"/>	Medicare	No ▾	-- SELECT -- ▾	🔄
<input checked="" type="checkbox"/>	Medicaid	No ▾	-- SELECT -- ▾	🔄
<input checked="" type="checkbox"/>	Health Net (Medi-cal) - Adults	No ▾	-- SELECT -- ▾	🔄
<input checked="" type="checkbox"/>	Health Net (Medi-cal) - Children	No ▾	-- SELECT -- ▾	🔄
<input checked="" type="checkbox"/>	Health Plan of San Joaquin (Medi-cal) - Adults	No ▾	-- SELECT -- ▾	🔄
<input checked="" type="checkbox"/>	Health Plan of San Joaquin (Medi-cal) - Children	Yes ▾		🔄
<input checked="" type="checkbox"/>	State Children's Health Insurance Program (Medi-cal)	No ▾	-- SELECT -- ▾	🔄

## Barriers Assessment for Child

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

Barriers

Use this form to identify whether a client has each individual barrier or not. The Clients last assessment is displayed as a default. You may, optionally, click [Previous Barriers Detail](#) to view information about the defaulted records or click [View Barrier History](#) to review all previous barriers. [View Barrier History](#)

Assessment Active

Identified Date: 08/14/2024 🗓️

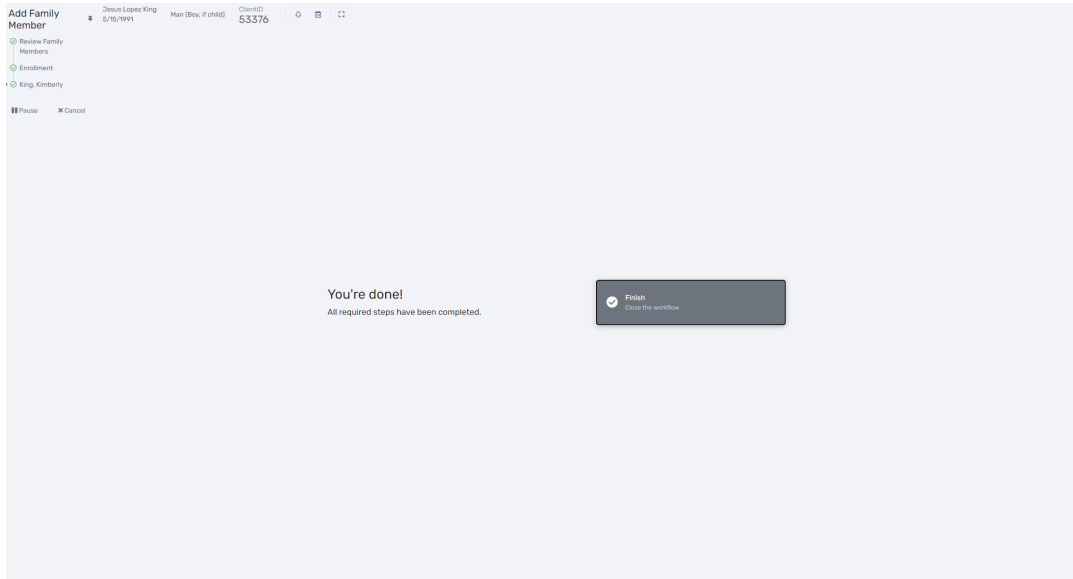
Screen: Special Needs ▾

Disabling Condition: No ▾

<input checked="" type="checkbox"/>	Barrier ⓘ	Help ⓘ	Barrier Present*	Condition is Indefinite	Explanation	Previous Barrier Details
<input checked="" type="checkbox"/>	Alcohol Use Disorder	🔍	No ▾			🔄
<input checked="" type="checkbox"/>	Chronic Health Condition	🔍	No ▾			🔄
<input checked="" type="checkbox"/>	Developmental Disability	🔍	No ▾			🔄
<input checked="" type="checkbox"/>	Drug Use Disorder	🔍	No ▾			🔄
<input checked="" type="checkbox"/>	HW/AIDS	🔍	No ▾			🔄
<input checked="" type="checkbox"/>	Mental Health Disorder	🔍	No ▾			🔄
<input checked="" type="checkbox"/>	Physical Disability	🔍	No ▾			🔄

## 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.

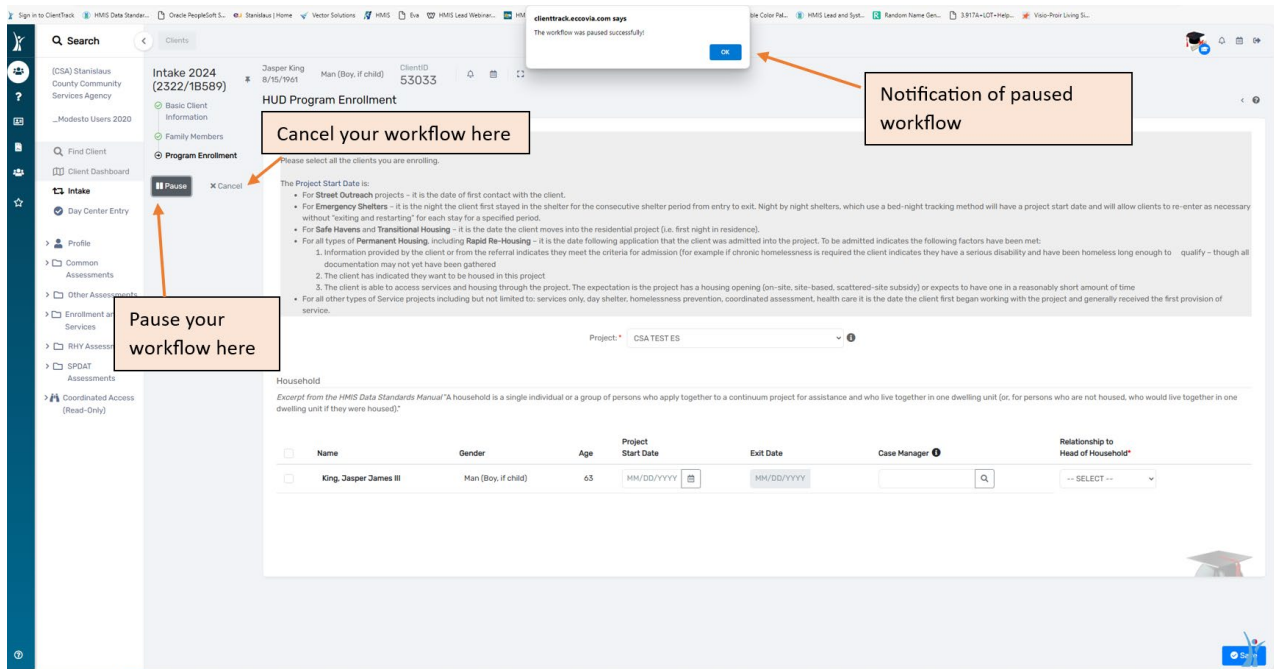
The screenshot shows the Client's Dashboard for Kimberly King. The dashboard includes a navigation sidebar on the left with options like Search, Find Client, Client Dashboard, Intake, Day Center Entry, Profile, Common Assessments, Other Assessments, Enrollment and Services, RHY Assessments, SPDAT Assessments, and Coordinated Access (Read-only). The main content area displays 'Kimberly King's Information' with a profile picture and the following details: Name: King, Kimberly; Birth Date: 10/26/2022; Age: 2; Gender: Woman (Girl, if child); Client ID: 53416; Race: Black, African American, or African. Below this is a table with the heading '1 result found.' and columns: Enrollment Description, Active Household Members, Household Type, Project Start Date, Housing Move-in Date, Project Exit Date, Case ID, EnrollID, Days Enrolled, Exit Destination, Organization, Last Assessed, and Program Type. The table contains one row: Emergency Shelter - Entry Exit, 3, Household with Children and Adults, 08/14/2024, 94515, 137712, 72, (CSA) Stanislaus County Community Services Agency, 8/14/2024, 0. Below the table is a section for 'Kimberly's Services' with columns: Date, Service, Units, \$ Total, Organization, and Service Creation Time. A callout box with an orange border and text 'Check the Information, Project, Project Start Date, and Active Household Members to ensure accuracy' has arrows pointing to the Name, Project Start Date, and Active Household Members fields. A graduation cap icon is visible in the bottom right corner.

**YOU HAVE COMPLETED YOUR ENROLLMENT!**



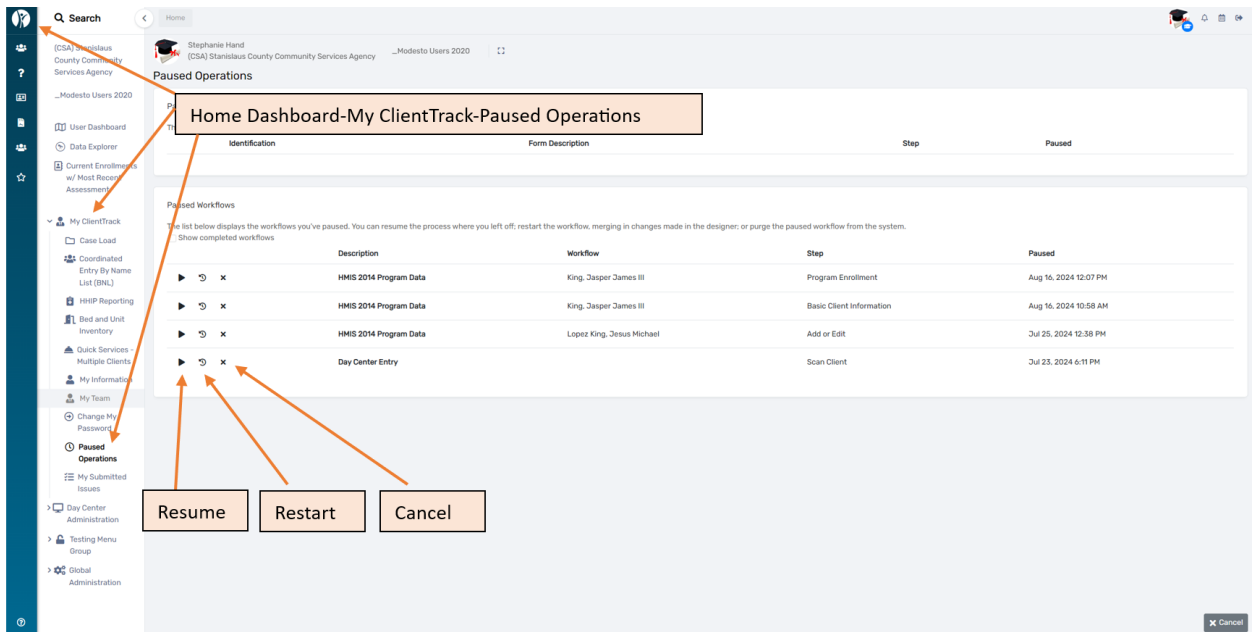
## Pause Your Workflow

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.

The screenshot shows the HUD Program Enrollment form for Ryan Arroyo (ClientID: 53415). The form includes a table with the following columns: Name, Gender, Age, Project Start Date, Exit Date, Case Manager, Relationship to Head of Household, and Housing Move-in Date. The row for Ryan Arroyo shows: Name: Arroyo, Ryan; Gender: Man (Boy, if child); Age: 35; Project Start Date: 10/31/2024; Exit Date: MM/DD/YYYY; Case Manager: Stephanie Hand; Relationship to Head of Household: Self; Housing Move-in Date: MM/DD/YYYY. An orange arrow points to the 'Housing Move-in Date' field, and a callout box says "Record the move-in date on the head of household only".

## 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.

The screenshot shows the HUD Program Enrollment form for Michael Barker (ClientID: 53404). The form includes a table with the following columns: Name, Gender, Age, Project Start Date, Exit Date, Case Manager, Relationship to Head of Household, and Date of Engagement. The row for Michael Barker shows: Name: Barker, Michael John; Gender: Man (Boy, if child); Age: 69; Project Start Date: 11/01/2024; Exit Date: MM/DD/YYYY; Case Manager: Stephanie Hand; Relationship to Head of Household: Self; Date of Engagement: MM/DD/YYYY. An orange arrow points to the 'Date of Engagement' field, and a callout box says "Enter a date of engagement if this matches the Project Start Date".

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

The screenshot shows the 'Current Living Situation' form for Michael Barker (ClientID 53404). The form includes fields for 'Information Date' (10/01/2024) and 'Enrollment' (10/01/2024 - CARE Street Outreach). The 'Current Living Situation Information' section contains a dropdown for 'Current Living Situation' (set to 'Place not meant for habitation'), a dropdown for 'Unsheltered Detail' (set to 'Living in car, truck or van'), and a 'Location Detail' text box. There is also a 'Record Contact' checkbox.

## 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

The screenshot shows the 'Client Information' form for Maria Donovan (ClientID 53379). The 'Basic Client Information' section includes fields for 'First Name' (Maria), 'Last Name' (Donovan), 'Middle Name' (Rose), 'Suffix', and 'Name Quality' (Full name reported). The 'Social Security Number' is 525 - 69 - 8547. The 'Basic Client Demographics' section includes 'Birth Date' (10/31/1985), 'Client Age' (39), and 'Date of Birth Quality' (Full DOB Reported). The 'Race and Ethnicity' section has 'Hispanic/Latino' checked. The 'Additional Race and Ethnicity Detail' section has 'Woman (65+ if child)' checked. The 'Specify Different Identity' section has 'A-gender' selected. The 'Pregnancy Status' is set to '--- SELECT ---'. The 'Veteran Status' is set to 'Yes'. An orange arrow points to the 'Veteran Status' dropdown with a callout box that says 'Make sure the client reports as a Veteran'.

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

**Universal Data Assessment (FY24)**

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links.

Default Client's Last Assessment

Assessment Date: 10/01/2024  
 Age at Assessment: 38  
 Assessment Type: Entry  
 Assessor: Stephanie Hand  
 Program: CCD SSVF-HP  
 Disabling Condition: Yes  
 Household Income as a Percentage of AMI: 30% or less  
 VAMC Station Number: (612) N. California, CA

Enrollment CoC  
 Select or enter the CoC code assigned to the geographic area where the head of household is staying at the time of project entry. Enrollment CoC will be defaulted to the program's CoC within a workflow.  
 Enrollment CoC: CA-S10 - Tullock/Modesto/Stanslaus County CoC

Living Situation  
 Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.  
 Prior Living Situation: Place not meant for habitation  
 Unsheltered Detail: Living in car, truck or van  
 Length of stay in the prior living situation: One night or less  
 Approximate date this episode of homelessness started: 09/30/2024  
 Regardless of where they stayed last night--Number of times the client has been on the streets, in ES, or SH\* in the past three years including today: One time  
 Total number of months homeless on the street, in ES, or SH in the past three years: One month (this time is the first month)

Health Insurance  
 Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

## 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.

**Veteran Information**

The Veteran information is used to collect details about the veteran's service.

Branch and Discharge Status  
 Please select the branch and discharge status. The HHS Data Manual provides the following instructions for veterans serving in more than one branch? For veterans who served in more than one branch of the upgraded during enrollment, the record should be edited to reflect the change.  
 Branch of the Military: Army  
 Discharge Status: Honorable

Military Service Dates  
 In the interest of data quality ClientTrack provides date fields and encourages users to enter exact dates if possible. If not, use the first of the year or another standard date determined by your organization. For HHS purposes, ClientTrack will always calculate years of military service only using year.  
 Service Entry Date: 11/20/2010  
 Service Exit Date: 11/20/2020

Please Select Theatre(s) of Operation(s)	Status
<input checked="" type="checkbox"/> Theatre of Operations: World War II	No
<input checked="" type="checkbox"/> Theatre of Operations: Vietnam War	No
<input checked="" type="checkbox"/> Theatre of Operations: Persian Gulf War (Operation Desert Storm)	No
<input checked="" type="checkbox"/> Theatre of Operations: Afghanistan (Operation Enduring Freedom)	No
<input checked="" type="checkbox"/> Theatre of Operations: Iraq (Operation Iraq Freedom)	No
<input checked="" type="checkbox"/> Theatre of Operations: Iraq (Operation New Dawn)	No
<input checked="" type="checkbox"/> Theatre of Operations: Other Peace-keeping Operations or Military Interventions (such as Lebanon, Panama, Somalia, Bosnia, Kosovo)	Yes
<input checked="" type="checkbox"/> Theatre of Operations: Korean War	No

## Connection with SOAR

The screenshot shows the 'SOAR Connection' assessment form for client Maria Donovan. The form is titled 'Indicate the Connection with SOAR for the client below'. It includes a 'Default Client's Last Assessment' dropdown menu, an 'Assessment Date' field set to 10/01/2024, and a 'Connection with SOAR' dropdown menu set to 'Yes'. The 'Assessment Active' status is indicated. The left sidebar shows the navigation menu with 'Intake' and 'Profile' sections expanded. The 'Intake' section includes 'New Assessment', 'Veteran Details', 'Connection with SOAR', 'Domestic Violence', 'Income', 'Homeless Prevention', 'Employment', and 'Education'. The 'Profile' section includes 'Common Assessments', 'Other Assessments', 'Enrollment and Services', 'RHY Assessments', 'SPDAT Assessments', and 'Coordinated Access (Read-Only)'. A 'Save' button is located at the bottom right of the form.

## 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.

The screenshot shows the 'HP Targeting Criteria' assessment form for client Maria Donovan. The form is titled 'Answer the SSVF HP Targeting Criteria to see the client's HP applicant total points'. It includes an 'Assessment Date' field set to 10/01/2024 and an 'Assessment Active' status. The form contains several questions with radio button options:

- Is Homelessness Prevention targeting screener required?
  - Yes
  - No
- Housing loss expected within...?
  - 1-4 days
  - 5-15 days
  - 14-21 days
  - More than 21 days
- Current household income:
  - \$0 (i.e., not employed, not receiving cash benefits, no other current income)
  - 1-14% of Area Median Income (AMI) for household size
  - 15-30% of AMI for household size
  - More than 30% of AMI for household size
- Past experience of homelessness (street/shelter/transitional housing) (any adult):
  - Most recent episode occurred within the last year
  - Most recent episode occurred more than one year ago
  - None
- Head of Household is not a current leaseholder/renter of unit:
  - Yes
  - No
- Head of Household has never been a leaseholder/renter of unit:
  - Yes
  - No
- Currently at risk of losing a tenant-based housing subsidy or housing in a subsidized building or unit (household):
  - Yes
  - No
- Rental Evictions within the past 7 years (any adult):
  - No prior rental evictions
  - 1 prior rental eviction
  - 2 or more prior rental evictions
- Criminal record for arson, drug dealing or manufacture, or felony offense against persons or property (any adult):
  - Yes
  - No
- Incarcerated As Adult (any adult in household):
  - Not incarcerated
  - Incarcerated once

A 'Save' button is located at the bottom right of the form.

## Employment Assessment

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

employed, record the hours worked in the week prior to assessment, and select the tenure of the client is employed, record the hours worked in the week prior to assessment, and select the tenure of the employ

Default Client's Last Assessment ⓘ

Assessment Active

Assessment Date: \* 10/01/2024

Employed? \* No

Why Not Employed: \* Looking for work

Default Client's Last Assessment ⓘ

Assessment Active

Assessment Date: \* 10/01/2024

Employed? \* Yes

Type of Employment: \* Full-Time

## Education Assessment

The screenshot shows the 'Adult Education Assessment' form. The form is titled 'Adult Education Assessment' and includes a 'Default Client's Last Assessment' button. The 'Assessment Date' is set to 10/01/2024. The 'Highest Grade Completed' dropdown is set to 'Post-secondary school'. The 'Secondary Education' dropdown is set to 'Associates Degree'. The form also includes a 'Save' button at the bottom right.

## 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.

Colleen Banks 2/28/2008 Woman (Girl, if child) ClientID 53383

### RHY BCP Status Assessment

To determine the number of homeless persons eligible for FYSB in RHY BCP-funded emergency shelter projects.

RHY - BCP - Status  
Collect once at project start for each stay. This element is required to be completed before project exit.

Date Status Determined: 10/01/2024

Youth Eligible for RHY Services: No

Reason why services are not funded by BCP grant: --SELECT--

- Out of age range
- Ward of the State - Immediate Reunification
- Ward of the Criminal Justice System - Immediate Reunification
- Other

Youth Eligible for RHY Services: Yes

Runaway Youth: Yes

--SELECT--

- Yes
- No
- Client Doesn't Know
- Client prefers not to answer
- Data Not Collected

**Conditional questions depending on eligibility**

## Employment Assessment:

Colleen Banks 2/28/2008 Woman (Girl, if child) ClientID 53383

### HMIS 2017 Employment Assessment

Check the appropriate employment status at the time of assessment. If the client is employed, record the hours worked in the week prior to assessment, and select the tenure of employment.

Assessment Date: 10/01/2024

Employed? Yes

Type of Employment: Full-Time

--SELECT--

- Full-Time
- Part-Time
- Seasonal / sporadic (including day labor)

Default Client's Last Assessment

Assessment Active

**Conditional questions depending on answer**

Assessment Date: 10/01/2024

Employed? No

Why Not Employed? --SELECT--

- Looking for work
- Unable to work
- Not looking for work

Default Client's Last Assessment

Assessment Active

## Education Assessment:

Colleen Banks 2/28/2008 Woman (Girl, if child) ClientID 53383

### Child Education Assessment

Indicate if the child is currently enrolled in school at the time of assessment. If the child is enrolled, select the type of school and enter the school name. If the child is not enrolled, enter date of last enrollment and reasons why the child is not enrolled. Enter any additional comments.

Assessment Date: 10/01/2024

Highest Grade Completed: 10th Grade

School Status: Attending school regularly

Comments:

Default Client's Last Assessment

Assessment Active

Pause X Cancel

## Health Assessment

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



Intake 2024 (2322/1B589) Colleen Banks 2/28/2008 Woman (Girl, if child) ClientID 53383

### Health Assessment

Select the appropriate general health status. If applicable, you will need to select the appropriate pregnancy status. If the client is pregnant, you will need to record the due date.

Default Client's Last Assessment

Assessment Active

Assessment Date: 10/01/2024

General Health Status: Very Good

Dental Health Status: Good

Mental Health Status: Fair

Pregnancy Status: Yes

Pregnancy Due Date: 12/30/2024

Pause Cancel

Save

## RHY Entry Assessment

Intake 2024 (2322/1B589) Colleen Banks 2/28/2008 Woman (Girl, if child) ClientID 53383

### RHY Entry Assessment (Client WS)

The RHY entry assessment is used to collect project entry data for RHY funded projects.

Assessment Active

Assessment Date: 10/01/2024

Sexual Orientation (R3): Bisexual

R3 - Required for head of household and adults in:  
 • Runaway Homeless Youth (RHY) funded projects  
 • Youth Homeless Demonstration Program (YHDP) using the Supplemental Reporting Tool (SRT)  
 • Permanent Supportive Housing (PSH) projects funded by (1) HUD-CAC, (2) Unsheltered Special NFO or (3) Rural Special NFO

Referral Source (R1): School

R1 - Required for head of household and adults in all Runaway Homeless Youth (RHY) projects except for Street Outreach.

Critical Issues (R13)

R13 - Required for head of household and adults in all Runaway Homeless Youth (RHY) projects except for Street Outreach.

Critical Issue	Status*
<input checked="" type="checkbox"/> Unemployment - Family member	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="checkbox"/> Mental Health Disorder - Family member	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="checkbox"/> Physical Disability - Family member	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="checkbox"/> Alcohol or Substance Use Disorder - Family member	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="checkbox"/> Insufficient income to support youth - Family member	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="checkbox"/> Incarcerated Parent of Youth	<input type="radio"/> Yes <input checked="" type="radio"/> No

Pause Cancel

Save

## System Use Assessment

Intake 2024 (2322/1B589) Colleen Banks 2/28/2008 Woman (Girl, if child) ClientID 53383

### System Use

Enter whether the client has formerly been a ward of the Child Welfare/Foster Care Agency system or the Juvenile Justice system.

Assessment Active

Assessment Date\* 10/01/2024

<input type="checkbox"/>	System	Formerly a Ward Of*	Number of Years	Number of Months (1-11)
<input checked="" type="checkbox"/>	Child Welfare/Foster Care Agency	Yes	Less than one year	5
<input checked="" type="checkbox"/>	Juvenile Justice System	No		

Pause X Cancel

Save

Conditional questions must be answered if Yes is selected for either question

## Projects for Assistance in Transition from Homelessness (PATH) Enrollment

### Project Enrollment

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

Intake 2024 (2322/1B589) Vanessa Maciel 8/1/1980 Woman (Girl, if child) ClientID 53380

### HUD Program Enrollment

Select the Project you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling.

The Project Start Date is:

- For **Street Outreach** projects – it is the date of first contact with the client.
- For **Emergency Shelters** – it is the night the client first stayed in the shelter for the consecutive shelter period from entry to exit. Night by night shelters, which use a bed-night tracking method will have a project start date and will allow clients to re-enter as necessary without "exiting and restarting" for each stay for a specified period.
- For **Safe Havens and Transitional Housing** – it is the date the client moves into the residential project (i.e. first night in residence).
- For all types of **Permanent Housing**, including **Rapid Re-Housing** – it is the date following application that the client was admitted into the project. To be admitted indicates the following factors have been met:
  - Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify – though all documentation may not yet have been gathered)
  - The client has indicated they want to be housed in this project.
  - The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time
- For all other types of Service projects including but not limited to: services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

Project: BHRIS PATH Supportive Services

Household  
Except from the HRIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

<input type="checkbox"/>	Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*	Date of Engagement	Date PATH Status Determined	Client became enrolled in PATH	Reason not enrolled in PATH
<input checked="" type="checkbox"/>	Maciel, Vanessa Maria	Woman (Girl, if child)	44	06/30/2024	MM/DD/YYYY	Stephanie Hand	Self	MM/DD/YYYY	MM/DD/YYYY	-- SELECT --	
<input type="checkbox"/>	Chavez, Leslie	Woman (Girl, if child)	1	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --				

PATH specific fields

Save

## SOAR Connection

Vanessa Maciel 8/1/1980 Woman (Girl, if child) ClientID 53380

### SOAR Connection

Indicate the Connection with SOAR for the client below

Default Client's Last Assessment: Assessment Active

Assessment Date: 06/30/2024

Connection with SOAR: No

## Current Living Situation

Vanessa Maciel 8/1/1980 Woman (Girl, if child) ClientID 53380

### Current Living Situation

Record the Clients Current Living Situation information below. If desired record a contact by checking the Record Contact and filling out the information for the contact. Also other services can be recorded.

Information Date: 06/30/2024

Enrollment: 06/30/2024 - BHRIS PATH Supportive Services

Current Living Situation Information

Current Living Situation: Place not meant for habitation

Unsheltered Detail: Other unsheltered situation

Location Detail:

Record Contact:

## Add Services

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

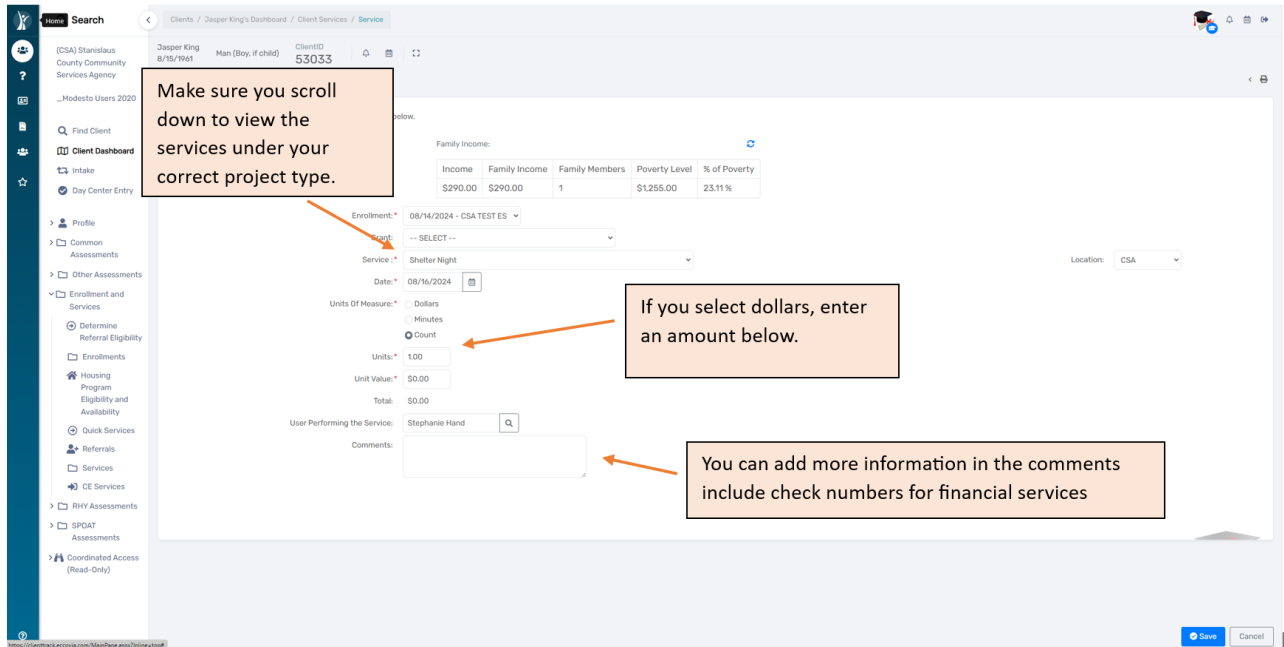
**#1** From the Client Dashboard by clicking on the Client's Services on the bottom of the page.

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

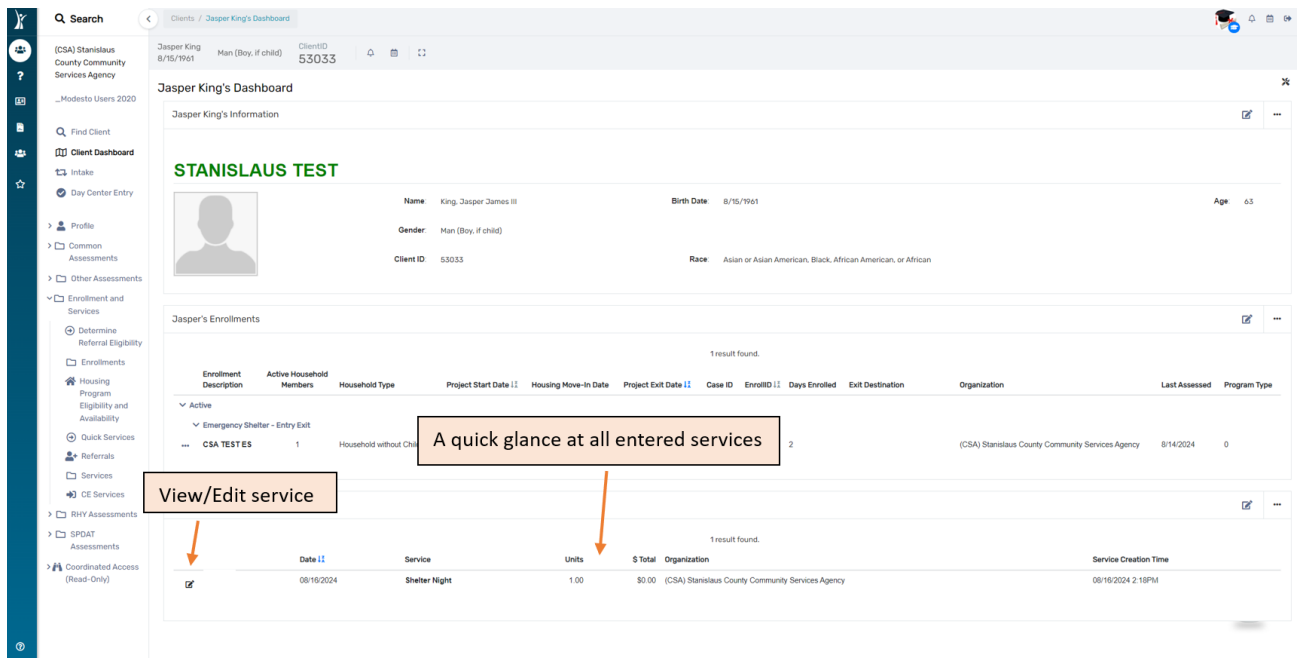
The screenshot displays the 'Jasper King's Dashboard' for a client named Jasper King (8/15/1961, Client ID 53033). The dashboard is divided into several sections:

- Jasper King's Information:** Displays personal details such as Name (King, Jasper James III), Birth Date (8/15/1961), Age (63), Gender (Man (Boy, if child)), Client ID (53033), and Race (Asian or Asian American, Black, African American, or African).
- Jasper:** A section with a sub-tab 'Enrollment' containing a table of active enrollments. An orange box labeled '#2' points to the 'Enrollment' sub-tab. The table has columns: Enrollment Description, Active Household Members, Household Type, Project Start Date, Housing Move-In Date, Project Exit Date, Case ID, EnrollID, Days Enrolled, Exit Destination, Organization, Last Assessed, and Program Type. One enrollment is listed: 'Emergency Shelter - Entry Exit' with Case ID 94515, EnrollID 137637, and 2 days enrolled.
- Jasper's Services:** A section with a sub-tab 'Services' containing a table of services. An orange box labeled '#1' points to the 'Services' sub-tab. The table has columns: Date, Service, Units, \$ Total, Organization, and Service Creation Time. It currently shows 'No records found.'

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.

**Enrollments and Services**

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	Enroll ID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Emergency Shelter - Entry Exit	3	Household with Children and Adults	08/14/2024			94515	137637	114		(CSA) Stanislaus County Community Services Agency	10/28/2024	0

**Quick Services**

Date	Service	Units	\$ Total	Organization	Service Creation Time
10/28/2024	Birth Certificate	1.00	\$0.00	(CSA) Stanislaus County Community Services Agency	10/28/2024 1:38PM
08/16/2024	Shelter Night	1.00	\$0.00	(CSA) Stanislaus County Community Services Agency	08/16/2024 2:18PM

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.

**Quick Service**

Use the Service Screen list to filter services available. You may also filter services available by Grant and/or Provider. Select the services the client has received and verify the Units and Unit Values.

Service Screen: Direct Services  
 Date: 08/25/2024  
 Grant: -- SELECT --  
 Provider Name:  
 Enrollment: 08/14/2024 - CSA TEST ES  
 User Performing the Service(s): Stephanie Hand  
 Location: CSA

**Select the date of the service(s)**

**Make sure the enrollment is active & attached**

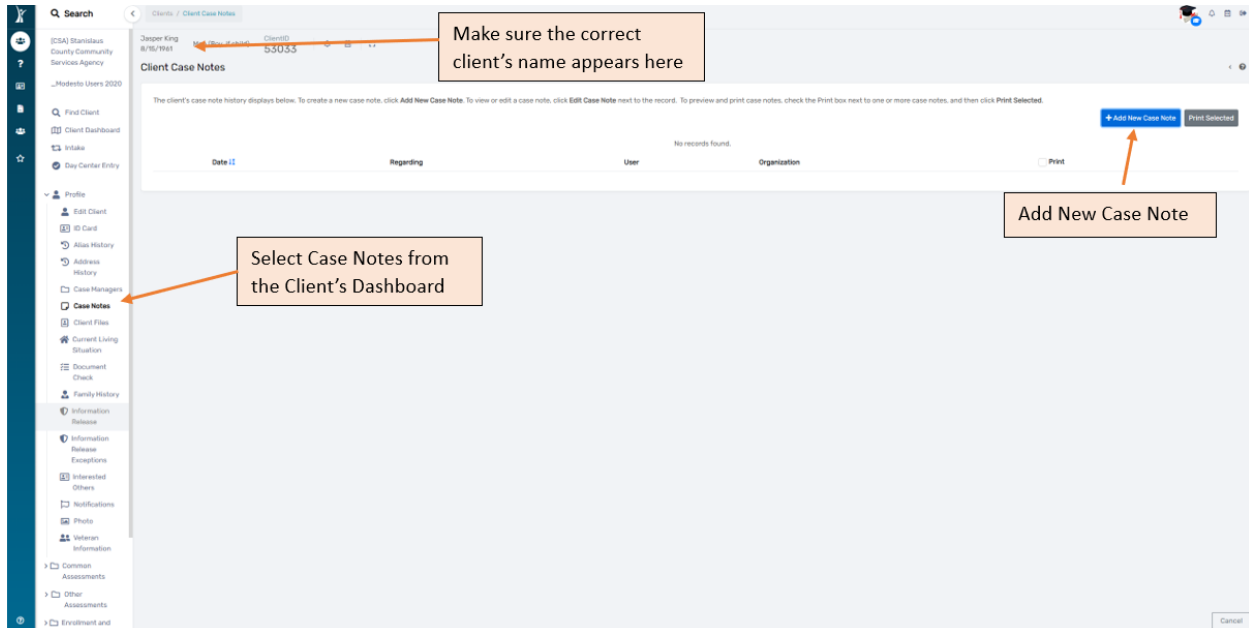
**Select the arrow to collapse/expand the sections**

**Select the box of the service(s) you wish to select**

Service	Unit Type	Units*	Unit Value*	Total	Help
Beard Brook Park (4)					
DST Health (0)					
DST Housing (0)					
RHY Navigation (0)					
SD Assisted Technology (0)					
SD Basic Needs (2)					
Abatement	Count	1.00	\$0.00	\$0.00	
<input checked="" type="checkbox"/> Cell Phone Assistance	Count	1.00	\$0.00	\$0.00	
Cultural Linkages	Count	1.00	\$0.00	\$0.00	
<input checked="" type="checkbox"/> Food/Food Voucher	Count	1.00	\$0.00	\$0.00	
Hygiene Kit	Count	1.00	\$0.00	\$0.00	
Language Barrier Assistance	Count	1.00	\$0.00	\$0.00	
		6.00	\$0.00	\$0.00	

## 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.

Case Note with Services

Complete case note **Entry Date**. Verify the **User** recording the note. Enter a brief title or description for the note in **Regarding**. Complete the case note in the text editor below. **Read Only** case note using the lower portion of the form.

Entry Date: 10/28/2024  
 User: Stephanie Hand  
 Regarding: Obtained BC  
 Note Type: --SELECT--  
 Enrollment: --SELECT--

Supervisor Review

If a supervisor review is required, please check the box and select the name of the individual to make the assignment.

Review Required:

Template: Case Note

Case Note

Client Name: Jasper King  
 Client ID: 53033

Read Only:

Type note into this text box

Locks the note so other users can only view not edit

Record a service to go along with the case note here. It must be tied to an enrollment!

Service*	Enrollment*	Units Of Measure*	Unit Value*	Units*	Total	Staying on Streets ES or Six*
--SELECT--	--SELECT--	--SELECT--			50.00	

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.

Client Case Notes

The client's case note history displays below. To create a new case note, click **Add New Case Note**. To view or edit a case note, click **Edit Case Note** next to the record. To preview and print case notes, check the **Print** box next to one or more case notes, and then click **Print Selected**.

Date	Regarding	User	Organization	Print
10/28/2024	Obtained BC	Stephanie Hand	(CSA) Stanislaus County Community Services Agency	<input type="checkbox"/>

View/Edit case notes here

Select the note(s) you wish to print and select Print Selected



## Add a Current Living Situation (CLS)

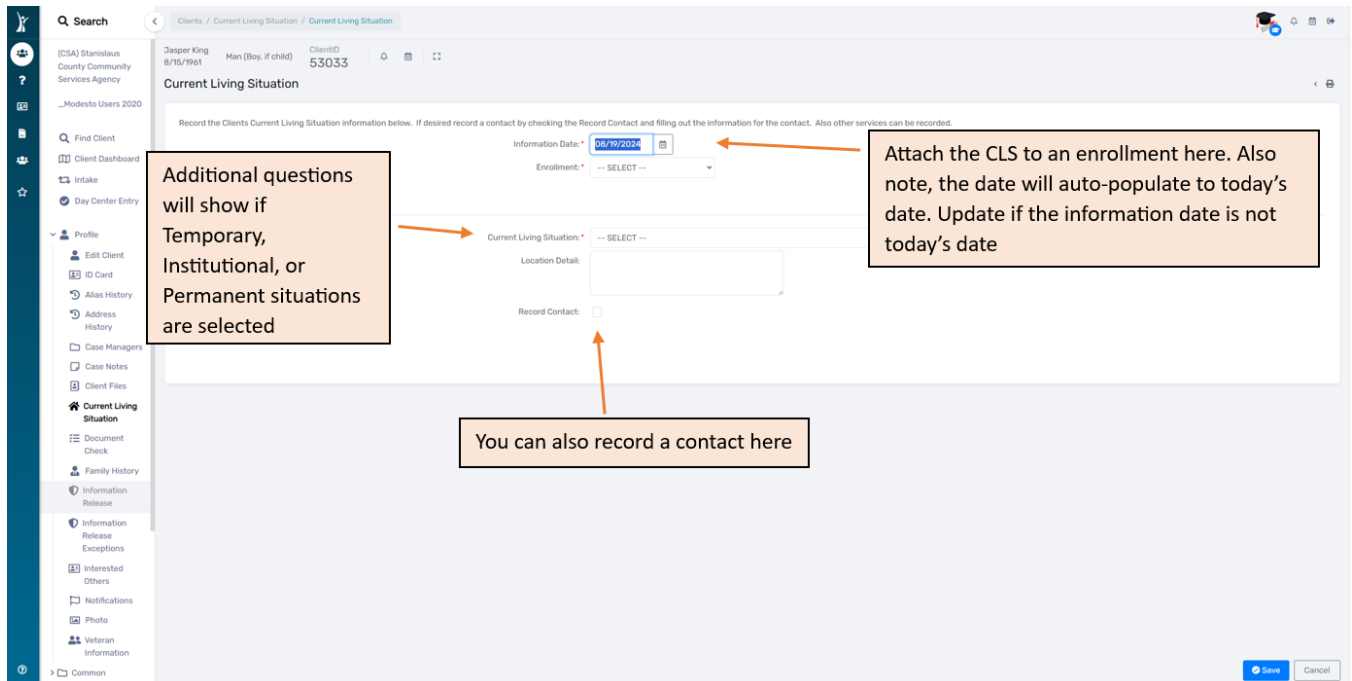
Certain projects, including but not limited to Street Outreach and Coordinated Entry, require you to collect and record a Current Living Situation when you contact a client. The Current Living Situation should reflect where the client is staying now (at the moment the information was verified). This 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

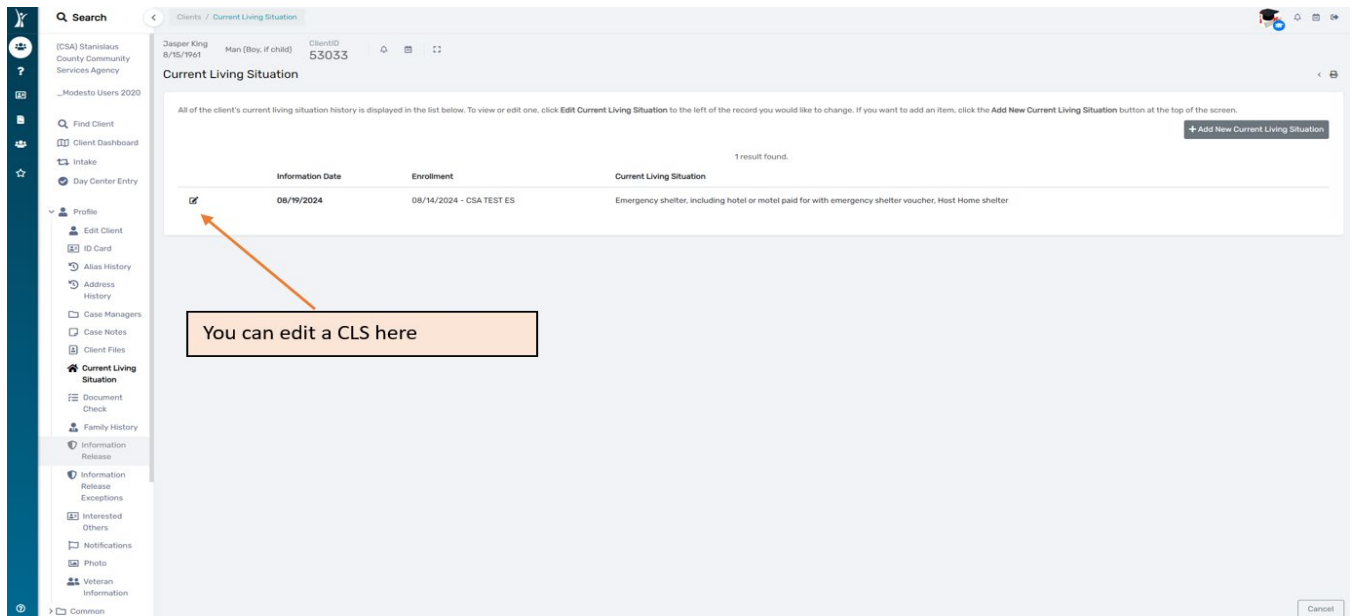
The screenshot shows the 'Jasper King's Dashboard' in a web application. The client's name is 'Jasper King' (8/15/1991, Client ID: 53033). The dashboard is divided into several sections: 'Jasper King's Information', 'Jasper's Enrollments', and 'Jasper's Services'. The 'Current Living Situation' section is highlighted in the left sidebar. A callout box with the text 'Update Current Living Situation' points to a button in the top right corner of the 'Current Living Situation' section. Below this, a table lists enrollment records.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-in Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Emergency Shelter - Entry Exit												
CSA TESTES	2	Household without Children	08/14/2024			94515	137637	5		(CSA) Stanislaus County Community Services Agency	8/14/2024	0

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.

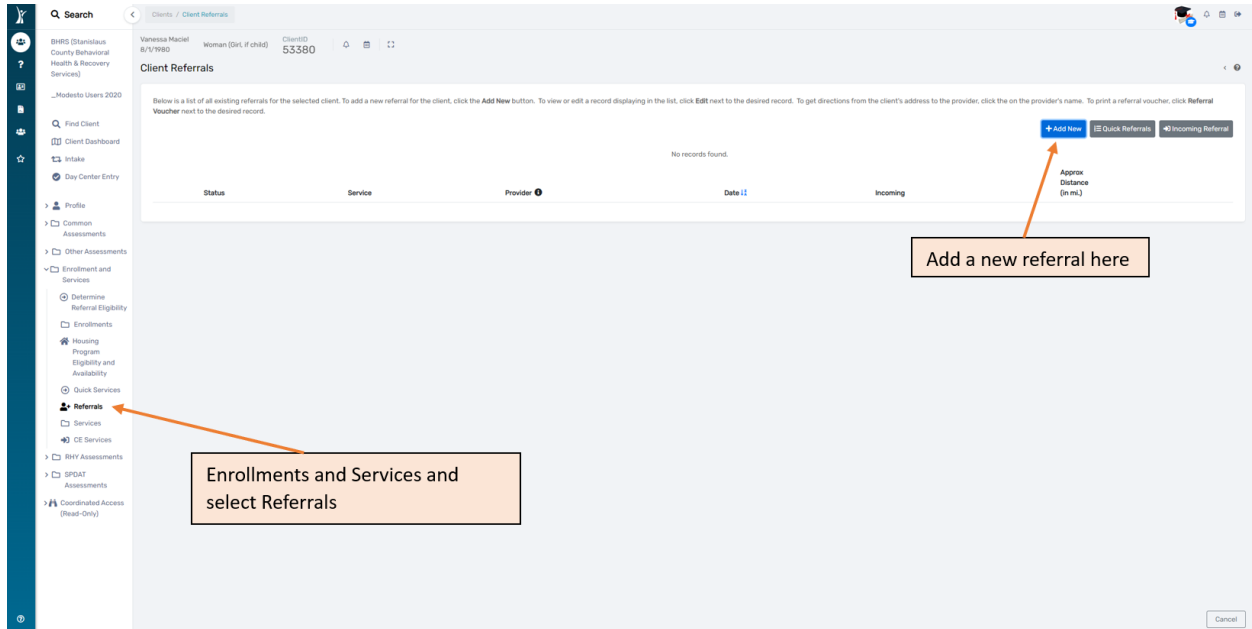


Once completed, you will return to the CLS screen in the previous step. You will be able to see the CLS you completed as well as and additional CLSs. **Note:** if you are only able to see your organization's entered CLSs (except for Coordinated Entry entries). For Coordinated Entry, if a CLS is not added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

Vanessa Maciel  
8/1/1980 Woman (Girl, if child) ClientID 53380

**Referral**

Referral  
Complete the information below to identify the service and the provider being referred to.

Referral Date: 08/01/2024  
 Referral End Date: MM/DD/YYYY  
 Referral Service: Community Mental Health

Referral Recipient  
Select the agency referral recipient as the Refer to Provider.

Refer to Provider: Stanislaus County Behavioral H

Referral Source  
Select the agency referral source as the Refer from Provider.

Refer from Provider: Stanislaus County Behavioral H  
 Refer from User: Stephanie Hand  
 Location: BHRS  
 Status: Referral Made  
 Comments:  
 Enrollment: 06/30/2024 - BHRS PATH Supportive Services  
 Associated Need/Barrier: Mental Health Disorder (06/30/2024)

**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**

Next Cancel

Vanessa Maciel  
8/1/1980 Woman (Girl, if child) ClientID 53380

**Referral**

Referral  
Complete the information below to identify the service and the provider being referred to.

Referral Recipient  
Select the agency referral recipient as the Refer to Provider.

Referral Source  
Select the agency referral source as the Refer from Provider.

**Search**

**Find Provider**

Locate a provider by using the selection criteria below. To get a list of all providers, leave the selection criteria blank and select search. To change your search, change the selection criteria and select search.

Provider: BHRS  
 Address:  
 City:  
 State:  
 Zip Code:  
 Provider Type: Provider

Search

1 result found.

Provider	Address	City	State	Zip Code
Stanislaus County Behavioral Health & Recovery Services (BHRS)	800 Scenic Drive, Building 4	Modesto	CA	95350

Cancel

**Select the provider after searching**

Associated Need/Barrier: Mental Health Disorder (06/30/2024)

Next Cancel

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 screenshot shows a web application interface for a referral process. At the top, the user's name 'Vanessa Maciel' and birth date '8/1/1980' are displayed, along with the client's name 'Woman (Girl, if child)' and ID '53380'. A progress bar at the top indicates three steps: 'Referral' (completed), 'Voucher and Information Release' (current step), and 'Referral Outcome' (pending). The main content area is titled 'Voucher and Information Release' and contains two sections: 'Voucher Information' with a checkbox for 'Voucher is Authorized' and 'Information Release' with a checkbox for 'Email Authorized'. At the bottom right, there are buttons for 'Previous', 'Next', and 'Cancel'.

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.

The screenshot shows the 'Referral Outcome' step of the referral process. The progress bar at the top shows 'Referral' and 'Voucher and Information Release' as completed steps, and 'Referral Outcome' as the current step. The main content area is titled 'Referral Outcome' and contains 'Outcome Information' with the instruction: 'Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.' Below this, there are input fields for 'Date Acknowledged', 'Appointment Date' (with an 'AM' dropdown), 'Result Date', a 'Result' dropdown menu, and a 'Comments' text area. At the bottom right, there are buttons for 'Previous', 'Finish', and 'Cancel'.

## Edit Referrals

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

The screenshot shows the 'Client Referrals' page for a client named Vanessa Maciel. The page displays a table with one referral record. An orange arrow points to the 'Referral Made' status in the table, and a callout box with the text 'Edit an existing referral' is positioned next to it.

Status	Service	Provider	Date	Incoming	Approx. Distance (in mi.)
Referral Made	Community Mental Health	Stanislaus County Behavioral Health & Recovery Services (BHRS)	08/01/2024	No	3.53

The screenshot shows the 'Referral' form for the same client. The form is divided into several sections: 'Referral', 'Voucher and Information Release', and 'Referral Outcome'. The 'Referral Outcome' section is highlighted, showing fields for 'Date Acknowledged', 'Appointment Date', 'Result Date', 'Result', and 'Comments'. An orange arrow points to the bottom of the form, and a callout box with the text 'Scroll down to the bottom of the screen to view the outcome information' is positioned next to it.

**Referral Outcome**

Outcome Information  
Enter the Date Acknowledged by the referral recipient, Appointment Date and Time, Result Date and Result.

Date Acknowledged: 08/02/2024  
Appointment Date: 08/20/2024 10:00 AM  
Result Date: 08/20/2024  
Result: Service Provided  
Comments: Attended appointment

## 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.

The screenshot shows the ClientTrack Home Dashboard for Stephanie Hand. The dashboard includes a navigation sidebar on the left, a search bar at the top, and a main content area. The main content area displays the following information:

- Welcome Stephanie Hand**
- Community Services Agency (CSA)**  
Stanislaus County
- Welcome to ClientTrack**
- The HMIS System for Stanislaus Community System of Care Collaborative**
- Administered by Stanislaus County Community Services Agency (CSA)**
- Contact Information:**  
HMIS Administrator: Lynnell Fuller (959) 558-7622, Email: [lfuller@stanislauscounty.com](mailto:lfuller@stanislauscounty.com)
- Help Information:**  
Use the Help Topics link or contact the HMIS Administrator.

The **My Case Assignments** section shows a table with 5 results found. The table has columns for Client Name, Begin Date, End Date, and Program. The data is as follows:

Client Name	Begin Date	End Date	Program
Allen, Faycom	06/18/2024		CES Coordinated Access

The **Current Program Enrollments** section shows a bar chart with the following data:

ProgramName	Cases	Clients
Non-Fed Emergency She...	1	1
CSA TEST ES	2	4

An orange callout box with the text "Select the link to view all of your assignments" points to the "View Configuration" link in the "My Case Assignments" section.

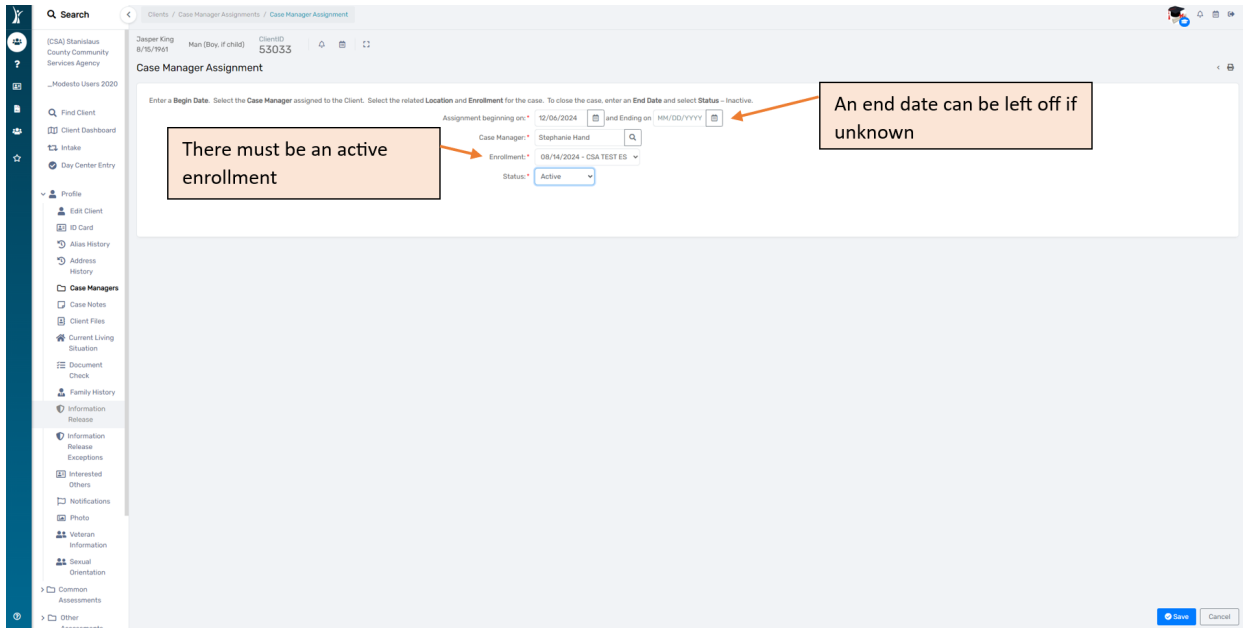
You can also view it on the client level. Start on the Client’s Dashboard and select the Profile folder on the left-hand side of the screen.

## Add Case Management Assignment

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

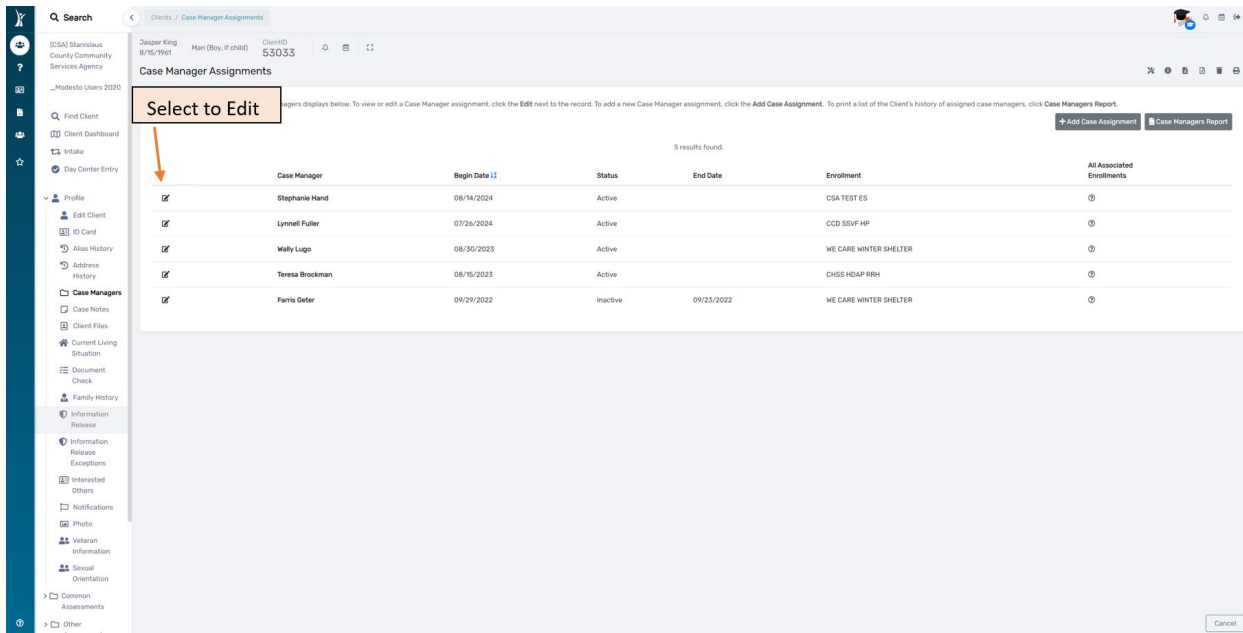
Select the date the case assignment will begin. An end date is not needed if the assignment is indefinite. There must be an active enrollment. Ensure the status is Active.



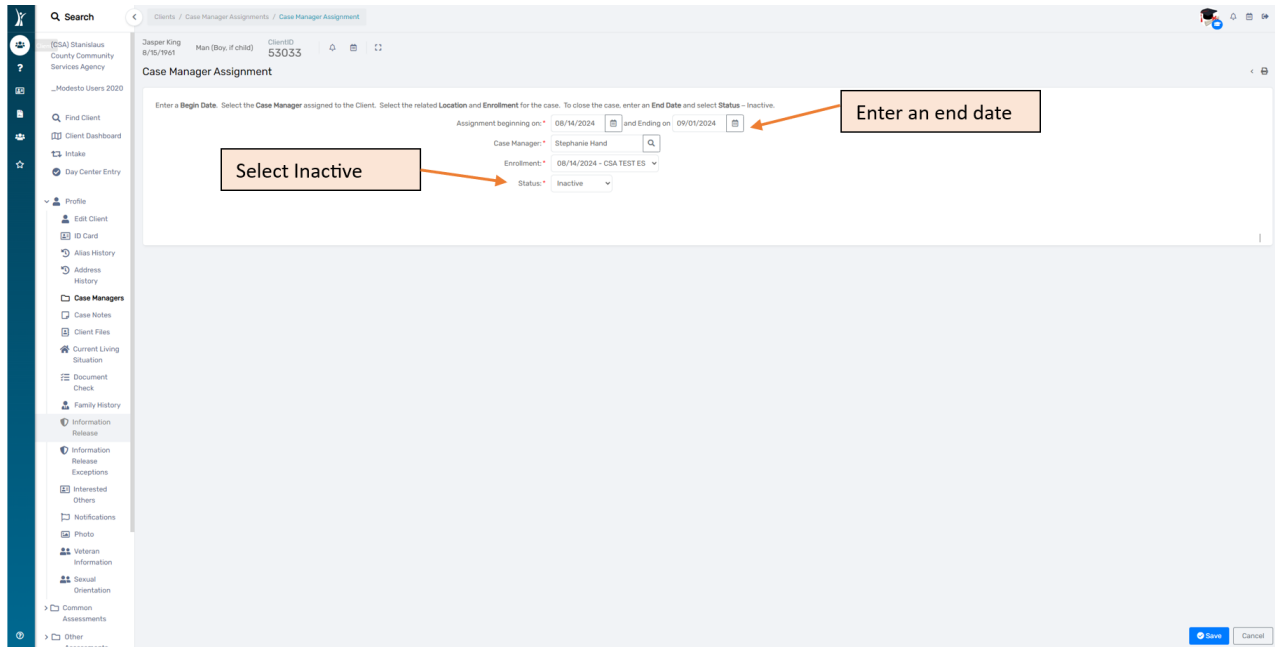


## Edit a Case Manager Assignment

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.

**Jasper King's Dashboard**

Jasper King's Information

**STANISLAUS TEST**

Name: King, Jasper James III | Birth Date: 8/15/1961 | Age: 63  
 Gender: Man (Boy, if child)  
 Client ID: 53033 | Race: Asian or Asian-American, Black, African American, or African

Jasper's Enrollments

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-in Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Emergency Shelter - Entry Exit	2	Household without Children	08/14/2024			94515	137637	5		(CSA) Stanislaus County Community Services Agency	8/14/2024	0

During Program Enrollment Update and Annual Assessments are both updated here

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.

Assessment For Enrollment (1263)

Type of Assessment

Note: if you have more than one individual enrolled in the project, you will be asked if you would like to complete an assessment for all members of the Household

Type of Assessment

- New During Program Enrollment/Update Assessment
- New Annual Assessment

Select the appropriate type of assessment

## During Program Enrollment Update

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

### Universal Data Assessment:

Jasper King  
8/15/1961 Man (Boy, if child) ClientID 53033

Universal Data Assessment (FY24)

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links.

**Default Client's Last Assessment**

Assessment Date: 10/28/2024  
 Age at Assessment: 63  
 Assessment Type: During Program Enrollment/Update  
 Assessor: Stephanie Hand  
 Program: CSA TEST ES


Health Insurance

Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

**Default Last Insurance Status**

Covered by Health Insurance: Yes

Type	Status	Reason No	Other Coverage
Private Pay Health Insurance	Yes		
Medicare	No	-- SELECT --	
Medicaid	No	-- SELECT --	
Health Net (Medi-cal) - Adults	No	-- SELECT --	
Health Net (Medi-cal) - Children	No	-- SELECT --	
Health Plan of San Joaquin (Medi-cal) - Adults	No	-- SELECT --	
Health Plan of San Joaquin (Medi-cal) - Children	No	-- SELECT --	
State Children's Health Insurance Program (Medi-cal)	No	-- SELECT --	
Veteran's Health Administration (VHA)	No	-- SELECT --	



Save

### Barrier Assessment:

Jasper King  
8/15/1961 Man (Boy, if child) ClientID 53033

Barriers

Use this form to identify whether a client has each individual barrier or not. The Client's last assessment is displayed as a default. You may, optionally, click **Previous Barriers Detail** to view information about the defaulted records or click **View Barrier History** to review all previous barriers.

**Assessment Active**

Identified Date: 10/28/2024  
 Screen: Special Needs  
 Disabling Condition: Yes

Barrier	Help	Barrier Present*	Condition is Indefinite	Explanation	Previous Barrier Details
<input checked="" type="checkbox"/> Alcohol Use Disorder	ⓘ	No			<input checked="" type="checkbox"/> Previous Barrier
<input checked="" type="checkbox"/> Chronic Health Condition	ⓘ	No			<input checked="" type="checkbox"/> Previous Barrier
<input checked="" type="checkbox"/> Developmental Disability	ⓘ	Yes			<input checked="" type="checkbox"/> Previous Barrier
<input checked="" type="checkbox"/> Drug Use Disorder	ⓘ	No			<input checked="" type="checkbox"/> Previous Barrier
<input checked="" type="checkbox"/> HIV/AIDS	ⓘ	No			<input checked="" type="checkbox"/> Previous Barrier
<input checked="" type="checkbox"/> Mental Health Disorder	ⓘ	Yes	Yes		<input checked="" type="checkbox"/> Previous Barrier
<input checked="" type="checkbox"/> Physical Disability	ⓘ	No			<input checked="" type="checkbox"/> Previous Barrier

## Domestic Violence Assessment:

Jasper King 8/15/1961 Man (Boy, if child) ClientID 53033

### Domestic Violence Assessment

If the client is a survivor of domestic violence, select Yes for Survivor of Domestic Violence, and select when the experience occurred.

Default Client's Last Assessment

Assessment Active

Assessment Date: 10/28/2024

Survivor of Domestic Violence:  Yes  
 No  
 Client Doesn't Know  
 Client prefers not to answer  
 Data Not Collected

When Experience Occurred: Within the past three months

Currently Fleeing: No

## Income and Sources:

Jasper King 8/15/1961 Man (Boy, if child) ClientID 53033

### Income and Sources, Non-Cash Benefits

Indicate below the client's sources of monthly income, non-cash benefits and expenses.

The following instructions are quoted from the HMIS Data Manual:

- When a client has income, but does not know the exact amount, a "flat" response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.
- Income received by or on behalf of a minor child should be recorded as part of household income under the Head of Household, unless the federal funder in the HMIS Program Specific Manual instructs otherwise. Income should be recorded at the client-level for heads of household and adult household members. Projects may choose to collect this information for all household members including minor children, as long as this does not interfere with accurate reporting per funder requirements. Projects collecting data through client interviews should ask clients whether they receive income from each of the sources listed rather than asking them to state the sources of income they receive.
- Income data should be recorded only for sources of income that are current as of the information date (i.e. have not been specifically terminated). As an example, if a client's employment has been terminated and the client has not yet secured additional employment, the response for Earned income would be "No." As a further example, if a client's most recent paycheck was 2 weeks ago from a job in which the client was working full time for \$15.00/hour, but the client is currently working 20 hours per week for \$12.00 an hour, record the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour).

Default Last Assessment

Assessment Active

Assessment Date: 10/28/2024

Income from Any Source: Yes

Non-Cash Benefits from Any Source: Yes

Expenses: -- SELECT --

Income

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Earned Income		\$2,000.00
<input type="checkbox"/> Unemployment Insurance		
<input type="checkbox"/> Social Security Insurance		
<input type="checkbox"/> Supplemental Security Income		
<input type="checkbox"/> Social Security Disability Income		
<input type="checkbox"/> Private Disability Insurance		
Count/Total Monthly Income:		1 \$2,000.00

Save and Close

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

# Annual Assessment

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

## Universal Data Assessment:

Ruby Schultz  
2/17/1987

Woman (Girl, if child)

Client ID:  
53411

Universal Data Assessment (FY24)

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links

Default Client's Last Assessment

Assessment Date: 11/01/2024

Age at Assessment: 37

Assessment Type: Annual

Assessor: Stephanie Hand

Program: CSA TEST ES

Health Insurance

Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

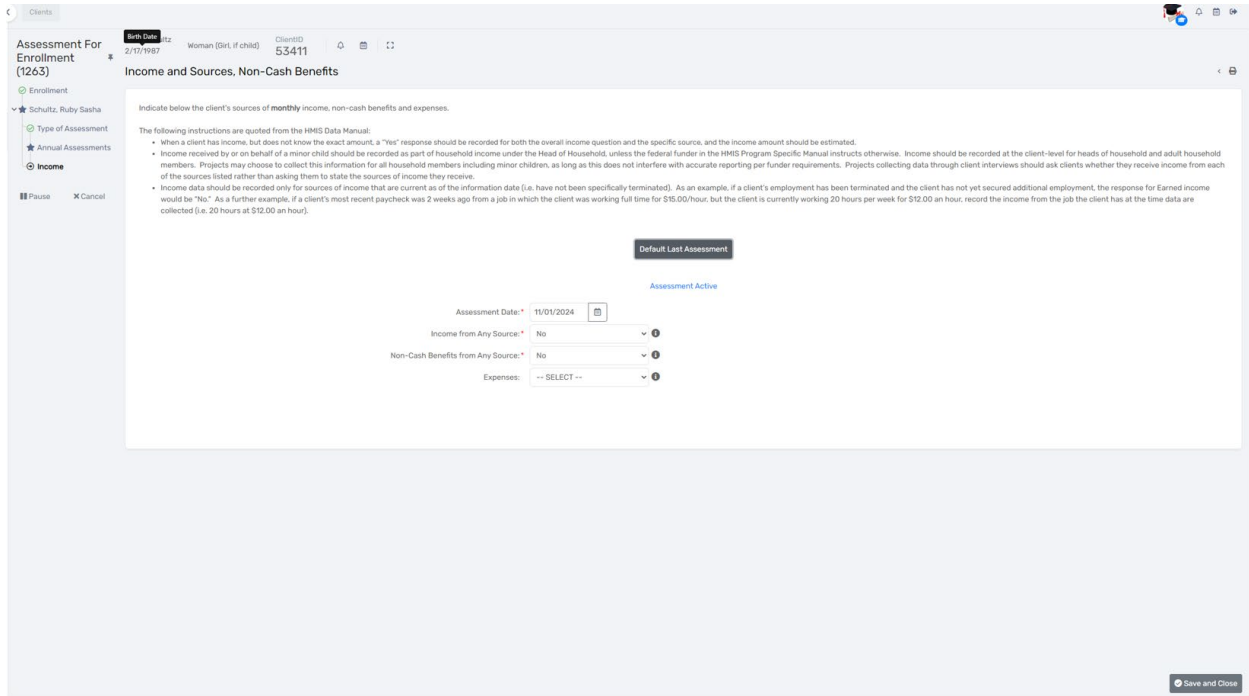
Default Last Insurance Status

Covered by Health Insurance: Yes

Type	Status*	Reason No	Other Coverage
<input checked="" type="checkbox"/> Private Pay Health Insurance	No	-- SELECT --	
<input checked="" type="checkbox"/> Medicare	No	-- SELECT --	
<input checked="" type="checkbox"/> Medicaid	No	-- SELECT --	
<input checked="" type="checkbox"/> Health Net (Medi-cal) - Children	No	-- SELECT --	
<input checked="" type="checkbox"/> Health Net (Medi-cal) - Adults	No	-- SELECT --	
<input checked="" type="checkbox"/> Health Plan of San Joaquin (Medi-cal) - Children	No	-- SELECT --	
<input checked="" type="checkbox"/> Health Plan of San Joaquin (Medi-cal) - Adults	Yes		
<input checked="" type="checkbox"/> State Children's Health Insurance Program (Medi-cal)	No	-- SELECT --	
<input checked="" type="checkbox"/> Veteran's Health Administration (VHA)	No	-- SELECT --	

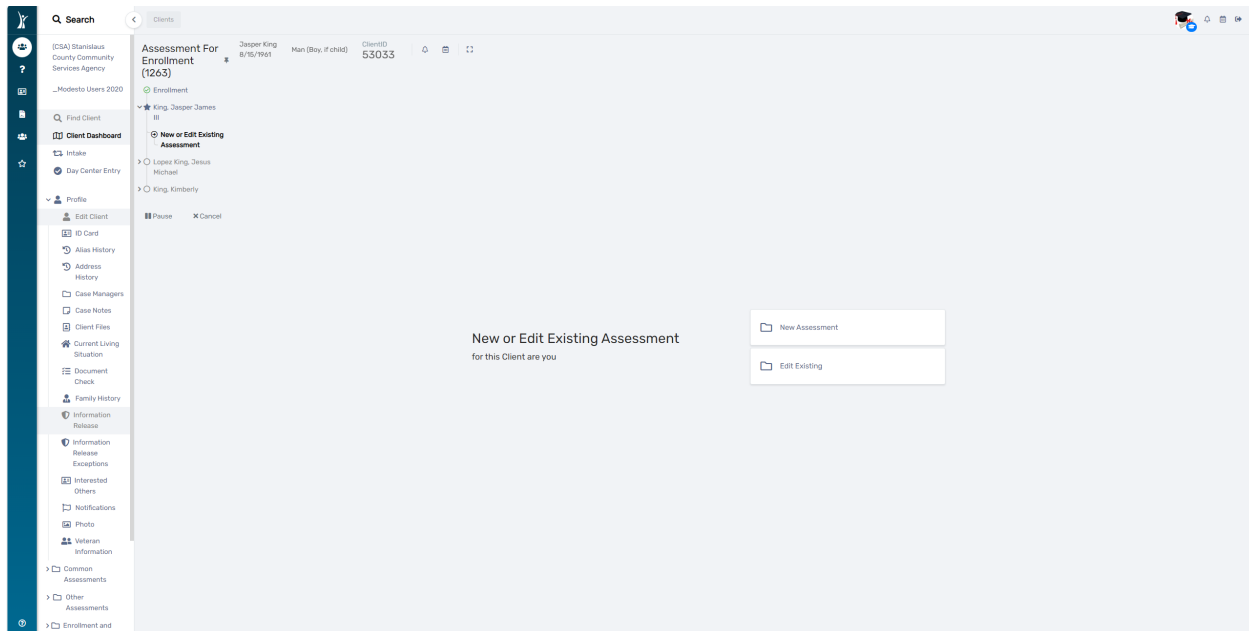
Save No Changes

## Income and Sources:

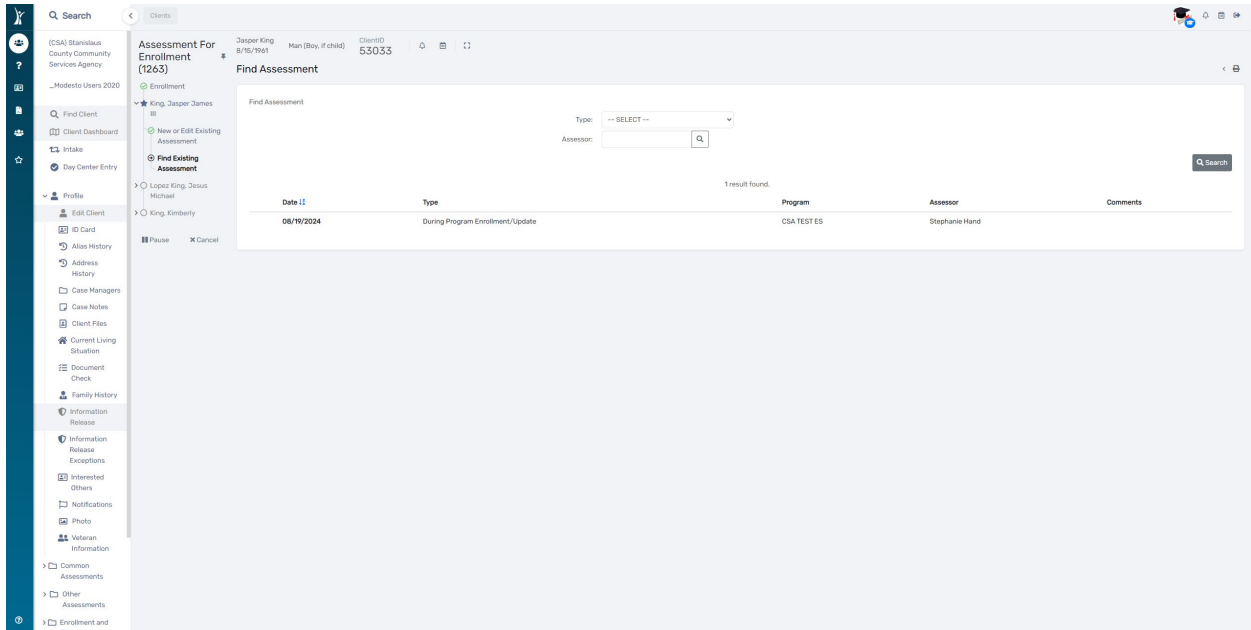


## Updating Existing Assessment

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.



**Vanessa Maciel's Dashboard**

Vanessa Maciel Information

**STANISLAUS TEST**

Name: Maciel, Vanessa Maria | Birth Date: 8/1/1980 | Age: 44  
 Gender: Woman (Girl, if child) | Client ID: 53380 | Race: Hispanic/Latina/ra, White

Vanessa's Enrollments

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
BHRS PATH Supportive Services	1	Household without Children	06/30/2024			54554	13721	124		BHRS (Stanislaus County Behavioral Health & Recovery Services)	6/30/2024	6

Context Menu: 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.

**Assessment For Enrollment (1263) HUD Program Enrollment**

Select the Project you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling.

The Project Start Date is:

- For **Street Outreach** projects – it is the date of first contact with the client.
- For **Emergency Shelters** – it is the night the client first stayed in the shelter for the consecutive shelter period from entry to exit. Night by night shelters, which use a bed-night tracking method will have a project start date and will allow clients to re-enter as necessary without "exiting and restarting" for each stay for a specified period.
- For **Safe Havens and Transitional Housing** – it is the date the client moves into the residential project (i.e. first night in residence).
- For all types of **Permanent Housing**, including **Rapid Re-Housing** – it is the date following application that the client was admitted into the project. To be admitted indicates the following factors have been met:
  - Information provided by the client or from the referral indicates they meet the criteria for admission.
  - The client has indicated they want to be housed in this project.
  - The client is able to access services and housing through the project. The expectation is the project will see the project field disabled when household members are selected. The project field can be changed when no household members are selected.

Project: BHRS PATH Supportive Services

Household

Excerpt from the HMS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)."

Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*	Date of Engagement	Date PATH Status Determined	Client became enrolled in PATH	Reason not enrolled in PATH
<input checked="" type="checkbox"/> Maciel, Vanessa Maria	Woman (Girl, if child)	44	06/30/2024	MM/DD/YYYY	Stephanie Hand	Self	MM/DD/YYYY	MM/DD/YYYY	-- SELECT --	
<input type="checkbox"/> Chavez, Leslie	Woman (Girl, if child)	1	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --				

Buttons: Save, No Changes

## View and Edit Master Assessment

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

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

The screenshot displays the 'Master Assessments' page for a client named Vanessa Maciel (ClientID: 53380). The page shows a table with one assessment record. The table has columns for Date, Program, Type, Assessor, Comments, and AssessID. The record shows a date of 06/30/2024, Program: BHRS PATH Supportive Services, Type: Entry, Assessor: Stephanie Hand, and AssessID: 229927. An arrow points to the 'Date' column with the label 'View/edit assessment'. Another arrow points to the 'Master Assessments' category in the left-hand navigation menu with the label 'Master Assessments'.

Date	Program	Type	Assessor	Comments	AssessID
06/30/2024	BHRS PATH Supportive Services	Entry	Stephanie Hand		229927

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.

Clients / 6/30/2024 Entry / Assessment Status

Vanessa Maciel  
6/1/1990 Woman (Girl, if child) ClientID: 53380

### Assessment Status

**Details**

- June 30, 2024
- BHRS PATH Supportive Services
- Entry
- Stephanie Hand

**Progress** 4 of 5

(RHY and PSH) RHY Entry Assessment	
HMS Universal Data	Complete
HMS Barriers	Complete
Domestic Violence	Complete
Financial	Complete

[Edit Assessment](#)

Select appropriate assessment

Edit Master Assessment Date here

Edit Master Assessment dates to clear Data Quality date errors.

Clients / 6/30/2024 Entry / Assessment Status / Master Assessment

Vanessa Maciel  
6/1/1990 Woman (Girl, if child) ClientID: 53380

### Master Assessment

A Master Assessment record ties together a number of separate, detailed assessments/data elements to a single process. For example, if you are creating an Entry Type Master Assessment, the data elements you record while this assessment is active will be tied to the entry.

Start Assessment:

Assessment Date: 06/30/2024

Assessment Type: Entry

Program: BHRS PATH Supportive Services

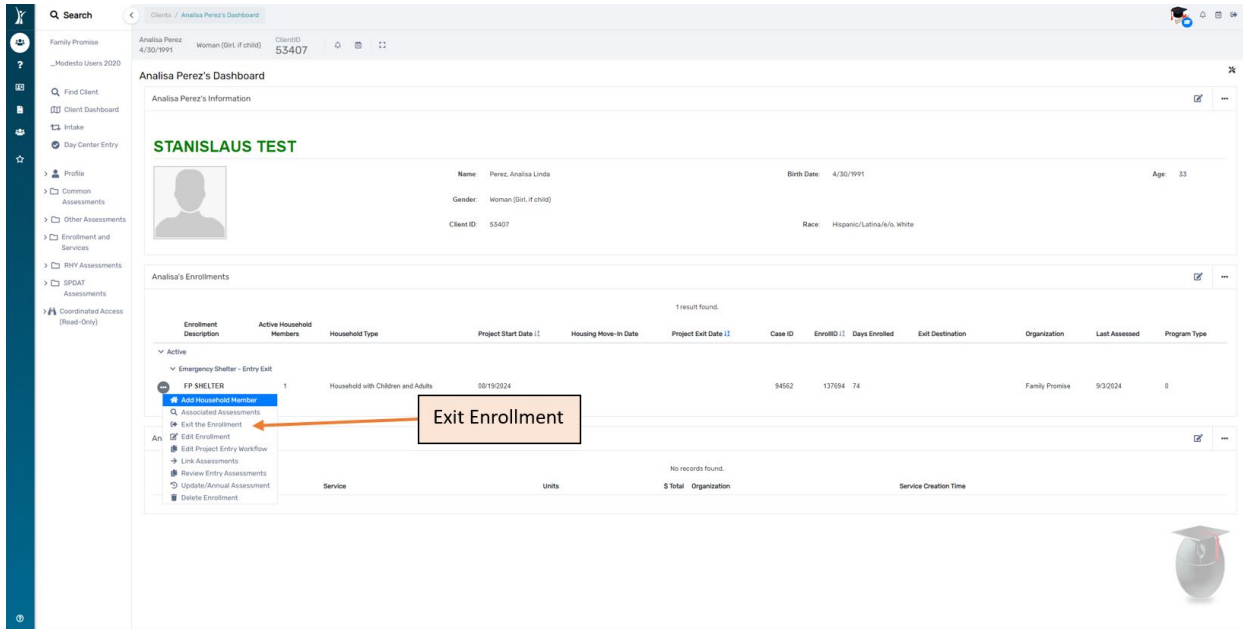
Assessor: Stephanie Hand

Comments: If you have any other comments, please enter them below.

Correct date if needed

# Exit Enrollments

When a client has transitioned from your project or is no longer receiving services for any reason, you will exit the client from 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.

HUD Program Exit (2297/1B582) - Client: Analisa Perez, 4/30/1991, Woman (Girl, if child), ClientID: 53407

Enrollment Exit (2024)

To exit the client from the Enrollment, enter the Exit Date and Destination.

Exit Date: 11/01/2024

Destination: Rental by client, no ongoing housing subsidy

Exit Reason: Completed Program

Case Manager Assignment: Stephanie Hand

End Case Assignment: [Icon]

Services

Family Income: No Recent Income, Family Members: 2, Poverty Level: \$1,703.33

Service Date: 11/01/2024

Grant: --SELECT--

Enrollment: 08/19/2024 - FP SHELTER

Displaying 1-200 of 269 results.

Service	Unit Type	Units	Unit Value	Total
Abatement	Count	1.00	\$0.00	\$0.00
ACES	Count	1.00	\$0.00	\$0.00
Adult Protective Services	Count	1.00	\$0.00	\$0.00
Agels	Count	1.00	\$0.00	\$0.00
Aging & Vet	Count	1.00	\$0.00	\$0.00
		0.00	\$0.00	\$0.00

Annotations:

- The date will auto populate to the current date (pointing to Exit Date)
- End Case Assignment (pointing to End Case Assignment)
- Add any services recorded only on the date of exit (pointing to Service Date)

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

Universal Data Assessment (FY24)

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links.

Assessment Date: 11/01/2024

Age at Assessment: 33

Assessment Type: Exit

Assessor: Stephanie Hand

Program: FP SHELTER

Default Client's Last Assessment

Health Insurance

Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Covered by Health Insurance: No

Default Last Insurance Status

Type	Status	Reason No	Other Coverage
Private Pay Health Insurance	No	-- SELECT --	
Medicare	No	-- SELECT --	
Medicaid	No	-- SELECT --	
Health Net (Medi-cal) - Adults	No	-- SELECT --	
Health Net (Medi-cal) - Children	No	-- SELECT --	
Health Plan of San Joaquin (Medi-cal) - Adults	No	-- SELECT --	
Health Plan of San Joaquin (Medi-cal) - Children	No	-- SELECT --	
State Children's Health Insurance Program (Medi-cal)	No	-- SELECT --	
Veteran's Health Administration (VHA)	No	-- SELECT --	

Annotations:

- Verify date matches exit date (pointing to Assessment Date)
- Default status if there are no changes (pointing to Covered by Health Insurance)

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

HUD Program Exit (2297/1B582) Barriers

Analisa Perez 4/30/1991 Woman (Girl, If child) ClientID 53407

Use this form to identify whether a client has each individual barrier or not. The Clients last assessment is displayed as a default. You may, optionally, click [Previous Barriers Detail](#) to view information about the defaulted records or click [View Barrier History](#) to review all previous barriers.

Identified Date: 11/01/2024  
Screen: Special Needs  
Disabling Condition: Yes

Barrier	Barrier Present*	Condition is Indefinite	Explanation	Previous Barrier Details
<input checked="" type="checkbox"/> Alcohol Use Disorder	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Chronic Health Condition	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Developmental Disability	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Drug Use Disorder	Yes	No		<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> HIV/AIDS	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Mental Health Disorder	Yes	Yes		<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Physical Disability	No			<a href="#">Previous Barrier</a>

Save Save & Close

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

HUD Program Exit (2297/1B582) Income and Sources, Non-Cash Benefits

Analisa Perez 4/30/1991 Woman (Girl, If child) ClientID 53407

Indicate below the client's sources of monthly income, non-cash benefits and expenses.

The following instructions are quoted from the HMSIS Data Manual:

- When a client has income, but does not know the exact amount, a "Yes" response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.
- Income received by or on behalf of a minor child should be recorded as part of household income under the Head of Household, unless the federal funder in the HMSIS Program Specific Manual instructs otherwise. Income should be recorded at the client-level for heads of household and adult household members. Projects may choose to collect this information for all household members including minor children, as long as this does not interfere with accurate reporting per funder requirements. Projects collecting data through client interviews should ask clients whether they receive income from each of the sources listed rather than asking them to state the sources of income they receive.
- Income data should be recorded only for sources of income that are current as of the information date (i.e. have not been specifically terminated). As an example, if a client's employment has been terminated and the client has not yet secured additional employment, the response for Earned income would be "No." As a further example, if a client's most recent paycheck was 2 weeks ago from a job in which the client was working full time for \$15.00/hour, but the client is currently working 20 hours per week for \$12.00 an hour, record the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour).

Default Last Assessment

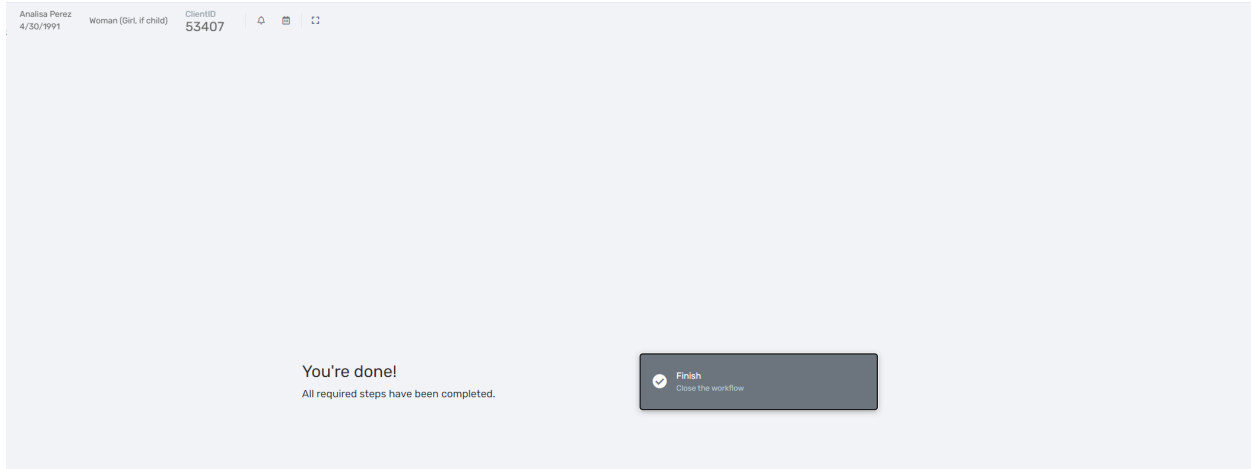
Assessment Date: 11/01/2024  
Income from Any Source: Yes  
Non-Cash Benefits from Any Source: Yes  
Expenses: --SELECT--

Type	Description	Monthly Amount
<input checked="" type="checkbox"/> Earned Income		\$1596.80
<input type="checkbox"/> Unemployment Insurance		
<input type="checkbox"/> Social Security Insurance		
<input type="checkbox"/> Supplemental Security Income		
<input type="checkbox"/> Social Security Disability Income		
<input type="checkbox"/> Private Disability Insurance		

Count/Total Monthly Income: 1 \$1596.80

Save and Close

Select Finish to complete your workflow and exit the client.



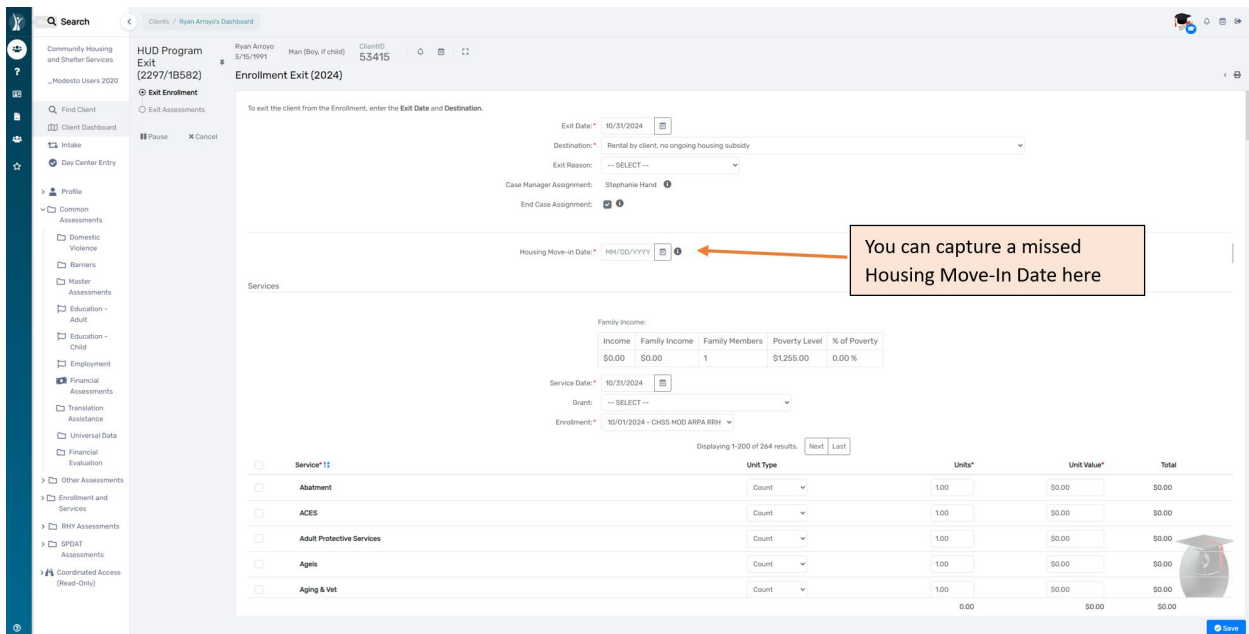
## Unique Project Requirements at Exit

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.

The screenshot shows a web application interface for a 'HUD Program Exit' assessment. The main content area is titled 'Housing Assessment' and contains the following fields:

- Assessment Date:** 10/31/2024
- Housing Assessment at Exit:** Able to maintain the housing they had at project entry
- Subsidy Information:** Without a subsidy

A callout box with an orange border and background points to the 'Subsidy Information' field. The text inside the box reads: 'Conditional question dependent on answer to first question'. The 'Housing Assessment at Exit' field is a dropdown menu, and the 'Subsidy Information' field is also a dropdown menu.



# Runaway Homeless Youth (RHY) Exit

## RHY Exit Assessment

Colleen Banks 2/28/2008 Woman (Girl, if child) ClientID 53383

**Enrollment Exit (2024)**

To exit the client from the Enrollment, enter the Exit Date and Destination.

Exit Date: 11/01/2024  
 Destination: Staying or living with family, permanent tenure  
 Exit Reason: -- SELECT --  
 Date of Status Determination: 10/01/2024  
 Youth Eligible for RHY Services: Yes  
 Runaway Youth: Yes  
 Case Manager Assignment: Stephanie Hand  
 End Case Assignment: [X] [i]

The answers will auto populate from the entry assessment if provided

Services

Family Income:

Income	Family Income	Family Members	Poverty Level	% of Poverty
\$0.00	\$1500.00	2	\$1703.33	88.06 %

Service Date: 11/01/2024  
 Grant: -- SELECT --  
 Enrollment: 10/01/2024 - CHS Hutton RHY BCP

Displaying 1-200 of 367 results. [Next] [Last]

Service	Unit Type	Units	Unit Value	Total
# of Family Members in Counseling	Count	1.00	\$0.00	\$0.00
Abatement	Count	1.00	\$0.00	\$0.00
Abuse Reporting	Count	1.00	\$0.00	\$0.00
		0.00	\$0.00	\$0.00

[Save]

HUD Program Exit (2297/1B582) RHY Exit Assessment

Colleen Banks 2/28/2008 Woman (Girl, if child) ClientID 53383

Use this assessment to collect RHY required data related to a client's exit from a RHY funded program. This assessment should be used in an exit workflow.

Assessment Active

Assessment Date: 11/01/2024  
 Project Completion Status: Completed project

Commercial Sexual Exploitation/Sex Trafficking

Ever received anything in exchange for sex (e.g. money, food, drugs, shelter): No

Labor Exploitation/Trafficking

Ever afraid to quit/leave work due to threats of violence to yourself, family, or friends: Yes  
 Ever promised work where work or payment different than you expected: No  
 Felt forced, coerced, pressured or tricked into continuing the job: No  
 In the last 3 months: Yes

[Save]

## RHY Counseling Assessment

HUD Program Exit (2297/1B582) Colleen Banks 2/28/2008 Woman (Girl, if child) ClientID 53383 Counseling Assessment

Exit Enrollment

Exit Assessments

- Barriers / Special Needs
- Income
- Employment
- Child Education
- Health
- RHY Exit Assessment
- Counseling Assessment**
- Safe and Appropriate Exit

Counseling Assessment - to be collected at exit for all adults and heads of household.

Default Last Assessment

Assessment Active

Pre-Exit

Assessment Date: 11/01/2024

Client received counseling: Yes

Type(s) of Counseling Received: Individual (checked), Family, Group - including peer counseling

Number of sessions received by exit: 5

Total number of sessions planned in Client's treatment or service plan: 5

Post-Exit

A plan is in place to start or continue counseling after exit: Yes

Save

## RHY Safe and Appropriate Exit

HUD Program Exit (2297/1B582) Colleen Banks 2/28/2008 Woman (Girl, if child) ClientID 53383 Safe and Appropriate Exit

Exit Enrollment

Exit Assessments

- Barriers / Special Needs
- Income
- Employment
- Child Education
- Health
- RHY Exit Assessment
- Counseling Assessment
- Safe and Appropriate Exit**

Complete the information below related to the selected client's safe and appropriate exit assessment and other relevant information.

Default Client's Last Assessment

Assessment Active

Assessment Date: 11/01/2024

Exit destination safe - as determined by client: Yes

Exit destination safe - as determined by the project/caseworker: Yes

Client has permanent positive adult connections outside of project: Yes

Client has permanent positive peer connections outside of project: Yes

Client has permanent positive community connections outside of project: Yes

Save

## 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.

**Colleen Banks's Dashboard**

Colleen Banks's Information

**STANISLAUS TEST**

Name: Banks, Colleen Marie      Birth Date: 2/28/2008      Age: 16  
 Gender: Woman (Girl, if child)  
 Client ID: 53383      Race: American Indian, Alaska Native, or Indigenous, Black, African American, or African

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Emergency Shelter - Entry Exit	0	Household with Only Children	10/01/2024		11/01/2024	54582	137719	31	Staying or living with fa.	Center For Human Services	11/1/2024	0

**Context Menu:**

- Emergency Shelter - Entry Exit
- Add Household Member**
- Missed Annual Update Assessment
- Edit Enrollment
- Edit Project Entry Workflow
- Edit Exit Workflow
- Link Assessments
- Re Enter the Enrollment
- Review Entry Assessments
- Review Exit Assessments
- RHY Aftercare
- Delete Enrollment

**Navigation:**

- RHY Assessments
- RHY Entry Assessment
- RHY System Utilization
- RHY BCP Assessment
- RHY Counseling Assessment
- RHY Exit Assessment
- Associated Assessments
- Safe and Appropriate
- RHY Aftercare
- SPDAT Assessments
- Coordinated Access (Read-Only)

### Create Aftercare Assessment

HMIS 2017 Post Exit      Colleen Banks      2/28/2008      Woman (Girl, if child)      ClientID      53383

**Create Aftercare Assessment**

Pause      X Cancel

Create Aftercare Assessment

Would you like to start a RHY Aftercare Assessment. Selecting Yes will create a Post-Exit Assessment for Colleen.

Yes

No

# RHY Aftercare Assessment

Clients / Colleen Banks's Dashboard

HMIS 2017 Post Exit  
Colleen Banks  
2/28/2008  
Woman (Girl, if child)  
ClientID  
53383

RHY Aftercare Assessment

Collected at Post-Exit stage for all RHY funded projects with the exception of the street outreach component (SOP).  
This must be dated within 180 days after the project exit date.

Information Date\* (Date information was collected): 11/01/2024  
Aftercare was provided\*: Yes  
Identify the primary way(s) it was provided\*:  
Via email/social media  
Via telephone  
✓ In person: one-on-one  
In person: group

Assessment Active

Save

## Projects for Assistance in Transition from Homelessness (PATH) Exit

### SOAR Connection

HUD Program Exit (2297/1B582)  
Vanessa Maciel  
8/1/1990  
Woman (Girl, if child)  
ClientID  
53380

SOAR Connection

Indicate the Connection with SOAR for the client below

Default Client's Last Assessment

Assessment Date\* 11/04/2024  
Connection with SOAR\* -- SELECT --

Assessment Active

Default status if there are no changes

Save

## Current Living Situation

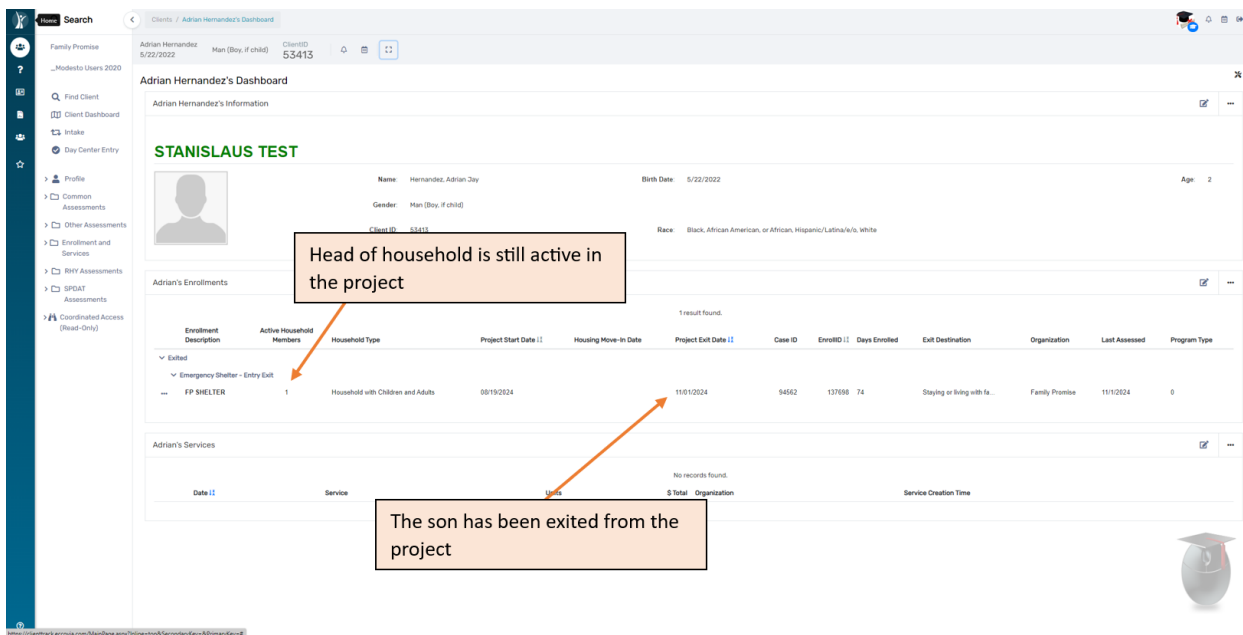
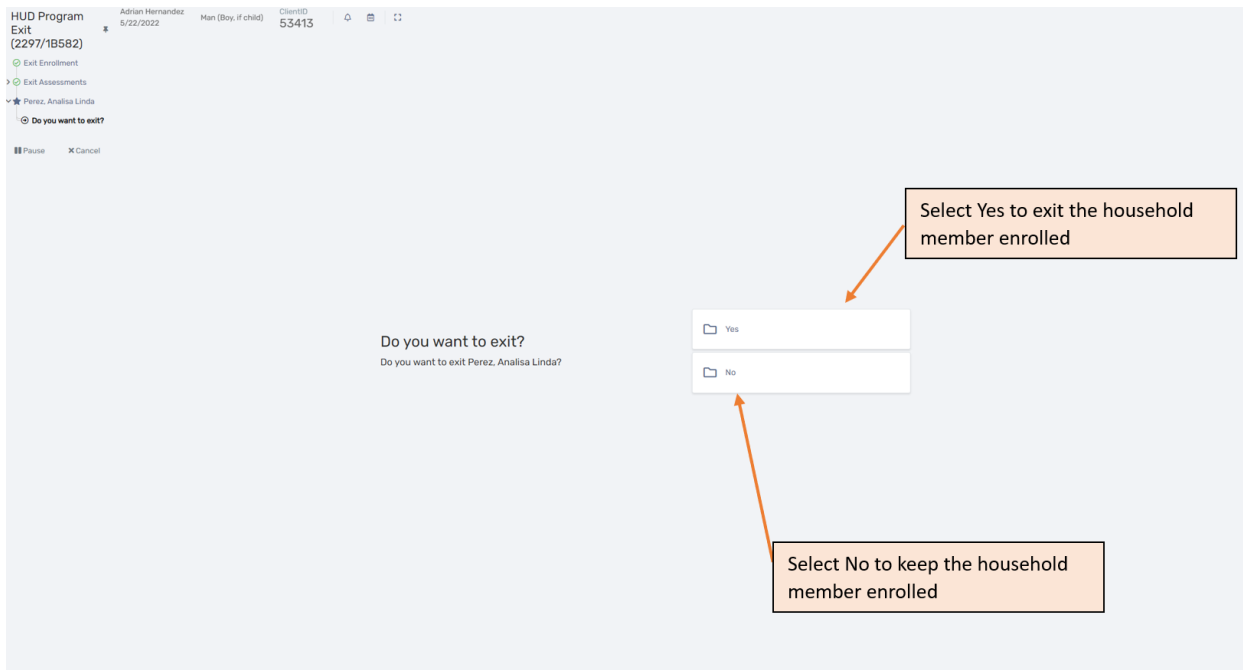
The screenshot shows a web application interface for recording a client's current living situation. At the top, the client's name is Vanessa Maciel, born 8/1/1980, identified as a woman. Her ClientID is 53380. The left sidebar lists assessment categories: Exit Enrollment, Exit Assessments, Connection with SOAR, Barriers / Special Needs, Income, and Current Living Situation (which is selected). The main form area contains the following fields:

- Information Date: 11/04/2024
- Enrollment: 06/30/2024 - 11/04/2024 - BHRS PATH Supportive Services
- Current Living Situation Information section with a dropdown menu set to "Other".
- A question: "Is client going to have to leave their current living situation within 14 days?" with a dropdown menu set to "No".
- Location Detail: an empty text input field.
- Record Contact: an unchecked checkbox.

Buttons for "Pause" and "Cancel" are in the bottom left, and a "Save" button is in the bottom right.

## 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](mailto:HMIS@stancounty.com).

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

The screenshot displays the 'Jasper King's Dashboard' in ClientTrack. At the top, it shows the client's name 'Jasper King', birth date '8/15/1961', gender 'Man (Boy, if child)', and client ID '53033'. Below this is a section titled 'STANISLAUS TEST' with a profile picture placeholder and fields for Name, Birth Date, Gender, Client ID, and Race. Underneath is a table for 'Jasper's Enrollments' with one record found. The table has columns for Enrollment Description, Active Household Members, Household Type, Project Start Date, Housing Move-In Date, Project Exit Date, Case ID, EnrollID, Days Enrolled, Exit Destination, Organization, Last Assessed, and Program Type. The record shows 'Emergency Shelter - Entry Exit' with 1 active household member, a household type of 'Household without Children', a project start date of '08/14/2024', and is associated with '(CSA) Stanislaus County Community Services Agency'. A callout box with an orange border and arrow points to a button in the bottom left corner of the interface, containing the text: 'Ensure you generate the issue on the page you are experiencing your issue'.

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.

**Report an Issue**

Enter a summary of your issue \*

The summary helps to quickly identify your issue when you're referring back to it later.

Please describe the issue

Rich text editor toolbar: Bold (B), Italic (I), Underline (U), Rubik font, Yellow highlighter, Bulleted list, Numbered list, Indent, Table.

Please enter any details that might help describe the issue or might help in solving it.

[Click here to attach a file or drag-and-drop](#)      [View Debug Information](#)

How can we reach you?

Email Address \*

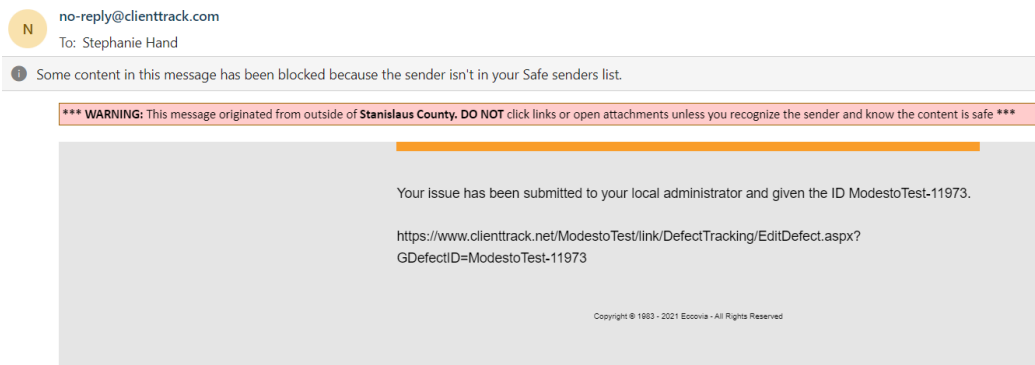
Phone Number \*

[Notify additional people](#)

**Submit**      Cancel

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.



Issues include problems, questions, or suggestions submitted by a user about ClientTrack. These issues can be created by clicking help anywhere throughout ClientTrack. Any issues you have submitted through the "Help & Support" system are displayed below. Use the Status list to filter results.

Issue #	Submitted Date	Type	Summary	Status	Assigned To
ModestoTest-11973	08/16/2024	Issue	Remove Enrollment	New	Not Assigned
ModestoTest-11971	07/24/2024	Issue	Slow to load	New	Not Assigned

Issue Status: Assigned, Closed, Fixed, Verify Needed, New, Pending for Review

2 results found.

Callout boxes:

- Edit/View your issue here (points to the issue rows)
- View every issue you have submitted (points to the sidebar link)
- See the summary, status and who the issue is assigned to (points to the Summary, Status, and Assigned To columns)

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.

Issue: ModestoTest-11973 TEST Remove Enrollment

Details: I started an enrollment on the wrong client. Can you please remove the CSA TEST ES enrollment for client 53033 case ID 94515.

Attachments: No Attachments

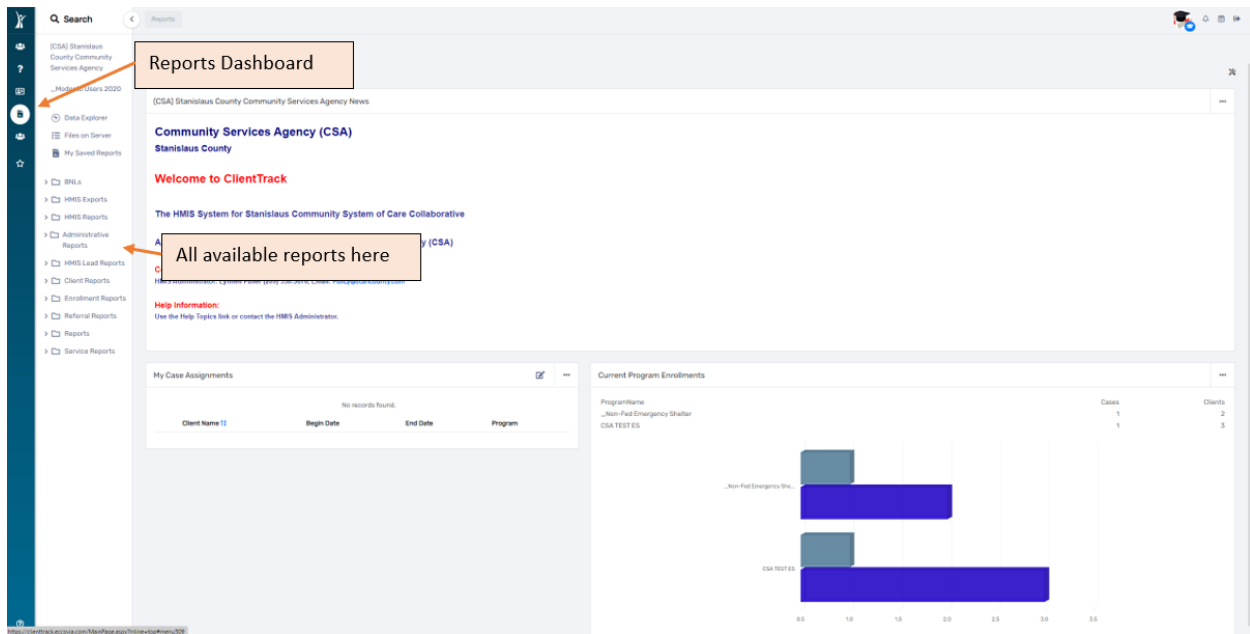
Notes: Stephanie Hand 2:26 PM. A new note has been added.

Callout boxes:

- Any notes that have submitted by the HMIS team or you will be listed here (points to the notes section)
- If you add a note, you can save the note or save and update the status of the note (points to the 'Save the note' button)

## 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.

**HMIS Active Client List**

To use saved report settings, select the desired settings description. To save the settings for a new report, select **Save Settings**, type the description of the settings in the **Save As** field, select the report settings, and run the report. The saved settings will appear in the list the next time you access this screen.

Saved Report Settings: -- SELECT --

Date Range  
Indicate the time period for this report. Only records that fall within the date range you select will be included.

Predefined Date Range: -- SELECT --  
Enrollments between: 10/01/2023 and 10/31/2024

Report Type  
Select **Active at any point** to show clients who were in the project(s) at any time in the report range. Select **Begin Enrollment** to show clients with a project start date in the time frame. Select **Exited** to show clients with a project exit date in the time frame. Select **Still Enrolled** to show clients who are still enrolled in the project(s) at the end of the report range.

Report Type: Active at any point

Active Client Method  
The Report Glossary method will run the report based on the Report Glossary definitions for Active Client. Selecting **Entry/Exit Dates** will only consider clients project start and end dates.

Active Client Method: Report Glossary Active Client

Organization(s)  
Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. Note: The list only shows organizations you are authorized to view.

Organization(s): (CA) HOST House  
 (CSA) Stanislaus County Community Services Agency  
 123  
 Aspiranet  
(MHP) (Mental Health) (P) (P) (Mental Health) (P) (P) (Mental Health) (P) (P)

Program(s)  
Check the box to include the program in the report. The list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the icon to select all.

Program Type: -- SELECT --  
 Program(s):  Filter by Program(s)  
 County HPSP  
 CSA TEST ES  
 DRAL SSO

The Help Icon will provide guidance on how the report will provide numbers

You will only see the organization and projects you have access to

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.

**HMIS Active Client List**

1 of 1

Save or Print your report here

HMIS Active Client – By Name List  
Report Range: 10/1/2023 to 10/31/2024

Report Criteria  
Report Type: Active at any point  
Active Client Filter: Report Glossary Active Client  
Organizations: (CSA) Stanislaus County Community Services Agency  
Programs: CSA TEST ES

Client ID	Client Name	SSN	Age	Gender	Race / Ethnicity	Veteran Status	
3033	King, Jasper James	XXX-XX-3233	62	Man (Boy, if child)	Multi-Racial / Non-Hispanic/Non-Latina/e/o	No	
	<b>Program Name</b>	<b>Organization</b>	<b>Relationship</b>	<b>Entry Date</b>	<b>Exit Date</b>	<b>Days in Project</b>	<b>CH Status</b>
	CSA TEST ES	(CSA) Stanislaus County Community Services Agency	Self	08/14/2024		78	No
53416	King, Kimberly	XXX-XX-2873	1	Woman (Girl, if child)	Black, African American, or African / Non-Hispanic/Non-Latina/e/o	No	
53376	Lopez King, Jesus Michael	XXX-XX-5285	33	Man (Boy, if child)	Multi-Racial / Hispanic/Latina/e/o	No	

ClientTrack™ Reports Page 1 of 1 Stephanie Hand 10/28/2024 4:57 PM

The plus sign after each client will allow for further details

## 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.

Indicate the time period for this report. Only records that fall within the date range you select will be included.

Predefined Date Range: -- SELECT --

Enrollments between: 11/01/2023 and 11/30/2024

Run Report By

Select Enroll to run the report filtered by program enroll date fall in the report date range. Select Exited to filtered by the program exit date. Select Enroll at any time to show all the clients still in the program during the report date range.

Report Type: Enroll at any point

Organization(s)

Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. Note: The list only shows organizations you are authorized to view.

Organization(s): (CA) HOST House, (CSA) Stanislaus County Community Services Agency, 123, Aspirant

Program(s)

Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the icon to select all.

Program(s):  Filter by Program(s),  NEN,  CES Coordinated Access,  CHS Hutton RHY BCP,  TSA Day Center

Grant(s)

Check the box to limit report results by selected grants. When checked, the list displays grants that belong to the organizations you selected above. Indicate which grants should be included

Grant(s):  Filter by Grant(s)

Users

Check the box to limit report results by selected users. When checked, the list displays users that belong to the organizations you selected above. Indicate which users should be included in the report by selecting each user separately, or click the icon to select all.

User:  Filter by User

Report Schedule Report Cancel

**DO NOT select a Grant. This will affect your report numbers**

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 Programs Report** \_ [ ] x

---

1 of 1 ↶ ↷ ↺ ↻ 📄 🖨  Find | Next ☰ 📄 ?

---

Clients in Programs  
11/1/2023 to 11/30/2024  ClientTrack™

*Report Criteria:*  
Organizations: Continuum of Care  
Programs: CES Coordinated Access

<i>Continuum of Care</i>		Enrolled ↕	Exited ↕	Total ↕	Clients ↕
<input type="checkbox"/>	CES Coordinated Access	1	37	38	37
Organization		1	37	38	37
Total		1	37	38	37

ClientTrack™ Reports Stephanie Hand  
11/1/2024 5:13 PM

Save PDF/Excel or print report

Select the plus button to view client information

### Service Summary Report

The Service Summary Report will provide a list of recorded services under your organization. You can filter 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.

**Service Summary Report**

**Date Range**  
 Indicate the time period for this report. Only records that fall within the date range you select will be included.

Predefined Date Range: --SELECT--  
 Service Date Between: 10/01/2023 and 11/30/2024

**Organization(s)**  
 Indicate which organizations should be included in the report by selecting each organization separately, or click the icon to select all. Note: The list only shows organizations you are authorized to view.

Organization(s):\* (CA) HDST House  
 (CSA) Stanislaus County Community Services Agency  
 J2S  
 Aggravant  
 BUMP (Behavioral Health & Business Partners)

**Program(s)**  
 Check the box to limit report results by selected programs. When checked, the list displays programs that belong to the organizations you selected above. Indicate which programs should be included in the report by selecting each program separately, or click the icon to select all.

Program(s):  Filter by Program(s)  
 \_NMI  
 CES Coordinated Access  
 CHS Hutton RHY BCP  
 TSA Day Center

**Grant(s)**  
 Check the box to limit report results by selected grants. When checked, the list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting each grant separately, or click the icon to select all.

Grant(s):  Filter by Grant(s)

**Services**  
 Select the specific services for the report, or leave the field blank to run the report for all services. NOTE: The services in this list are filtered according to the organizations and funding sources selected above.

Services:  Filter by Services  
 Abatement (1018)  
 ACES (1055)  
 Adult Protective Services (1128)  
 Agies (1106)  
 ... & More Programs

**DO NOT select a Grant. This will affect your report numbers**

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.

Save PDF/Excel or print report

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



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
<a href="#">Assistance with Housing Application</a>	1	1.00	\$0.00	1	1	0	1	0	1
<a href="#">Attended Job Interview</a>	1	1.00	\$0.00	1	1	1	2	0	3
<a href="#">Birth Certificate</a>	2	2.00	\$0.00	2	2	2	4	0	6
<a href="#">Bus Pass</a>	1	1.00	\$0.00	1	1	1	2	0	3
<a href="#">CalFresh</a>	1	1.00	\$0.00	1	1	0	1	0	1
<a href="#">Case Management</a>	29	21.00	\$0.00	14	14	4	16	0	20
<a href="#">Completed education program</a>	1	1.00	\$0.00	1	1	0	1	0	1
<a href="#">Completed Education Program</a>	1	1.00	\$0.00	1	1	1	2	0	3
<a href="#">DRAIL</a>	2	2.00	\$0.00	2	2	0	2	0	2
<a href="#">Language Barrier Assistance</a>	1	1.00	\$0.00	1	1	0	1	0	1
<a href="#">MGM</a>	1	1.00	\$0.00	1	1	0	1	0	1
<a href="#">Obtain Glasses</a>	1	1.00	\$0.00	1	1	1	2	0	3
<a href="#">Rental Assistance</a>	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](#)

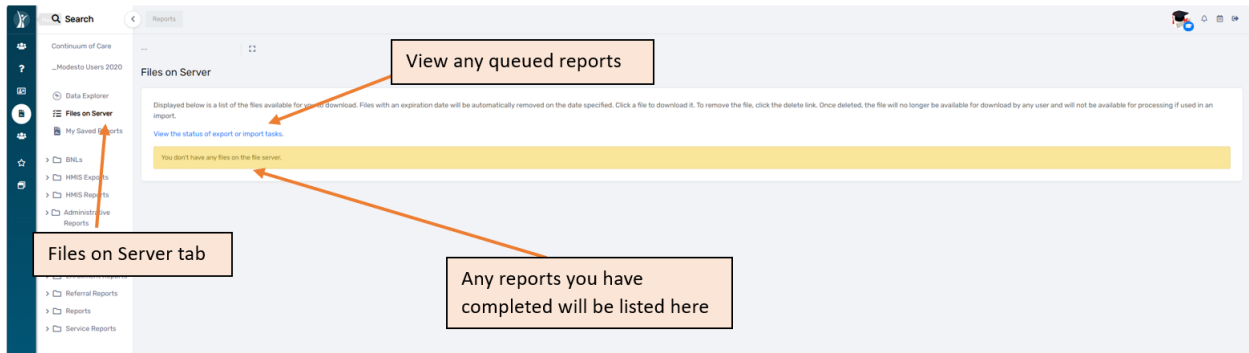
[HMIS CSV Format-Specifications](#)

[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.

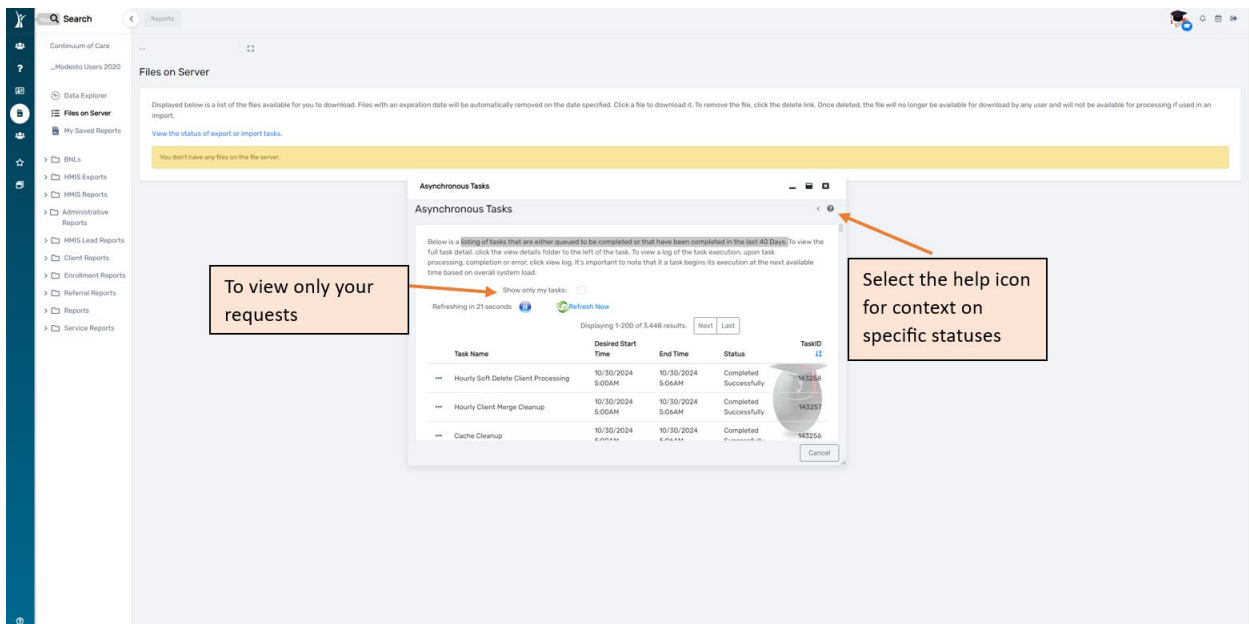
Please remember you must delete the file from your downloads folder and clear your recycle bin. Unless you save the document on a secure drive, files should never be kept on your computer. You can download the file again from Files on Server if you need them. Note: record the Task ID to identify which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

The screenshot shows the 'CSV CAPER - FY2024 v1.2' configuration window. The interface includes a sidebar with navigation options like 'Data Explorer', 'Files on Server', and 'My Saved Reports'. The main area is divided into sections for 'Organization', 'Grant Program', 'Grant(s)', and 'Project'. The 'Organization' section has a dropdown menu with selected items: '(GA) HDST House', '(CA) Stanislaus County Community Services Agency', '123 Aspirant', and 'BAPF (APR) (Kiosk) (Print) (Redacted Month) (Redacted Program)'. The 'Grant Program' section has dropdowns for 'Grant Program' and 'Grant Component', both set to '-- SELECT --'. The 'Grant(s)' section has a 'Filter by Grant(s)' dropdown with selected items: 'MDD/CITY ESG', 'MDD/CITY ESG DV ES', 'MDD/CITY ESG ES FY23-24', and 'STAN/COUNTY ESG ES'. The 'Project' section has a 'Filter by Project(s)' dropdown with a selected item: 'TSA Emergency Shelter'. At the bottom right, there are 'Run Export' and 'Cancel' buttons.

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 contained within the document.

### Export Encryption

If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long.

If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information.

Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should *always* be enclosed in double-quotes.

Encrypt Export:

Include Header Row in CSV File(s):

Always Quote CSV Values(s):

ClientTrack is not responsible for the protection, use, or misuse of information contained in the exported file(s).

I assume the full responsibility of ensuring the security of the exported file(s) and any data contained within

**Done**

### Export Encryption

If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long.

If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information.

Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should *always* be enclosed in double-quotes.

Encrypt Export:

Password: \*

Confirm Password: \*

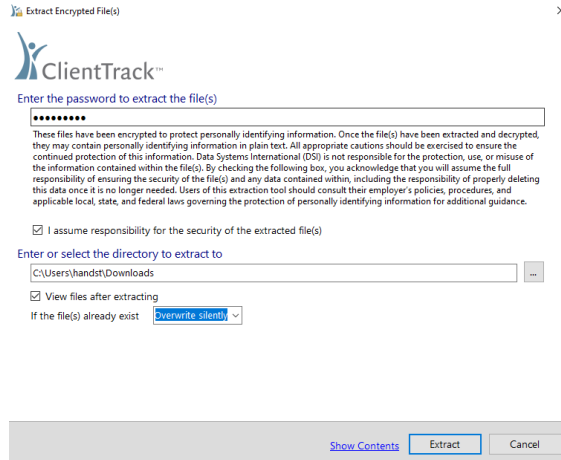
**Done**

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

**Find completed exports**

**Select on the report you would like to download**

	Created	Expires
HMS APR_CAPER 2024 Validation_20241104175741_TaskID_143470.exe	Stephanie Hand 11/4/2024 5:57 PM	11/4/2025 5:57 PM
HMS APR 2024 Export_20241104175700_TaskID_143469.exe	Stephanie Hand 11/4/2024 5:57 PM	11/4/2025 5:57 PM
HMS APR_CAPER 2024 Pre-Load 2_20241104174654_TaskID_143468.exe	Stephanie Hand 11/4/2024 5:46 PM	11/4/2025 5:46 PM
HMS APR_CAPER 2024 Pre-Load_20241104173601_TaskID_143467.exe	Stephanie Hand 11/4/2024 5:36 PM	11/4/2025 5:36 PM
HUD Data Quality 2024_20241104164662_TaskID_143466.exe	Stephanie Hand 11/4/2024 4:46 PM	11/4/2025 4:46 PM

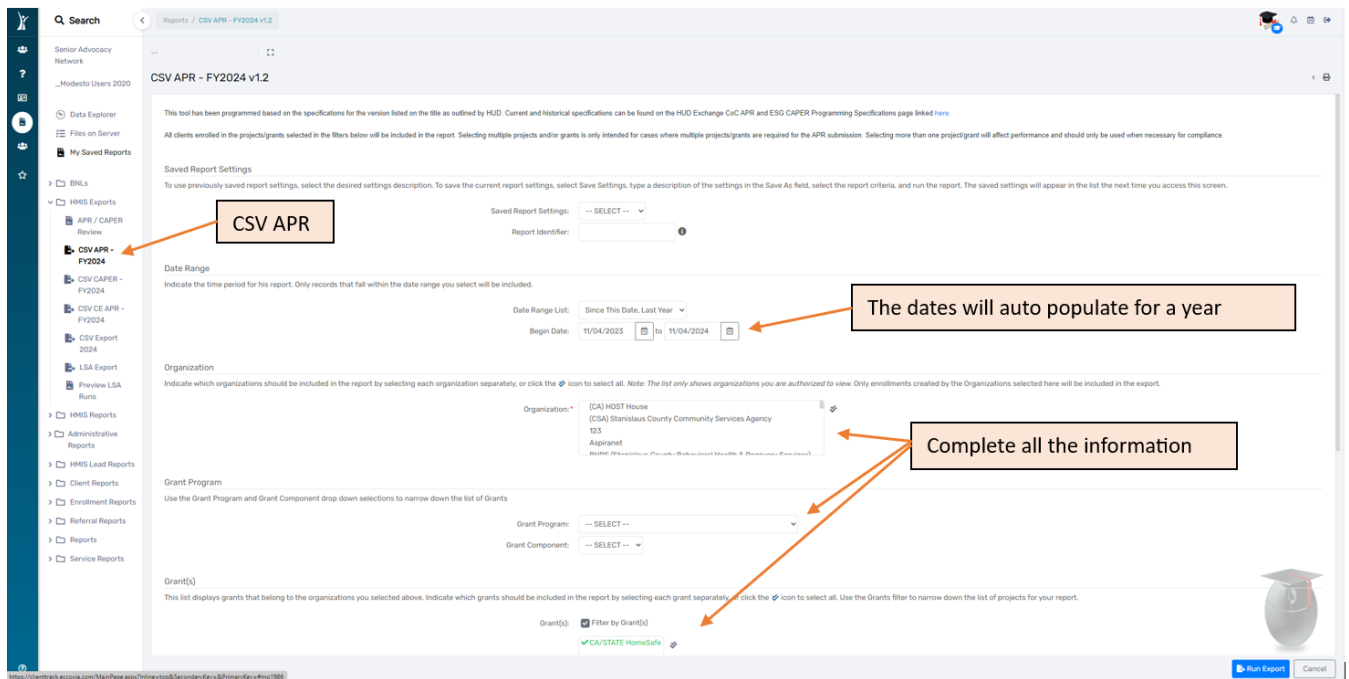


Review further in this guide for more information about the [Validation Report](#).

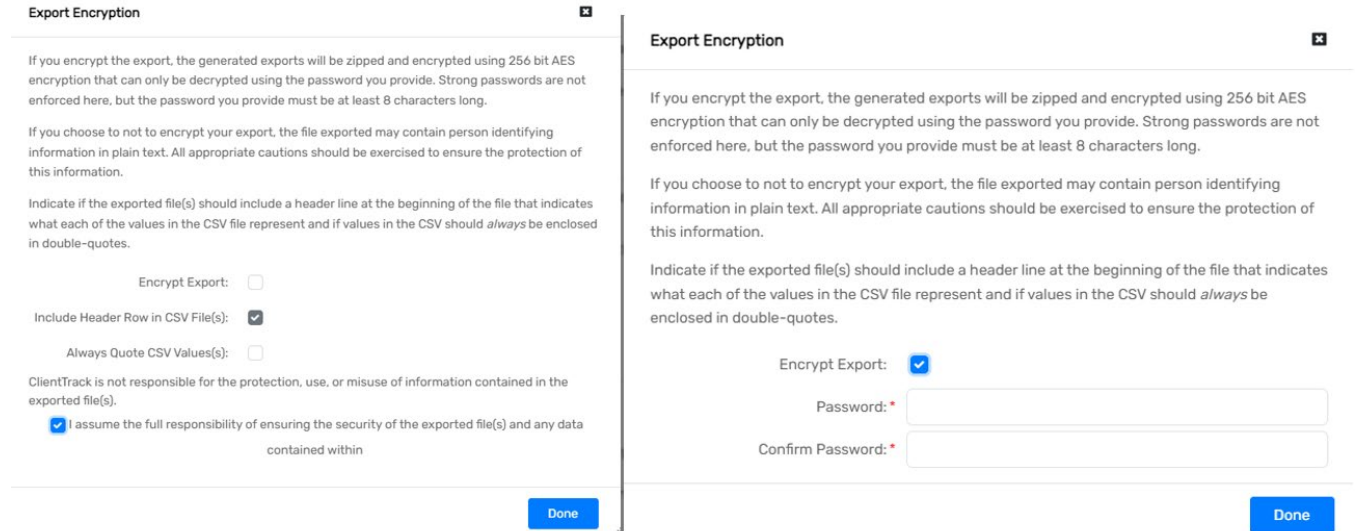
### CSV APR

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

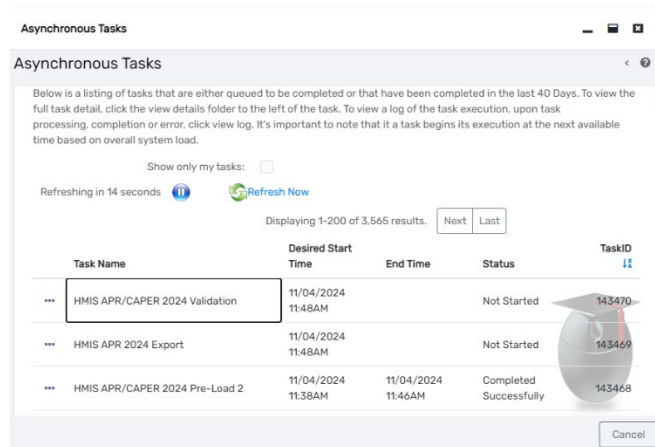
Navigate to the Reports Dashboard and select the HMIS Exports folder. Select CSV APR FY2024. Complete all the information. **Note:** Generate Validation File will be auto selected. If you would like a validation file with the APR, keep this box marked.



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 contained within the document.

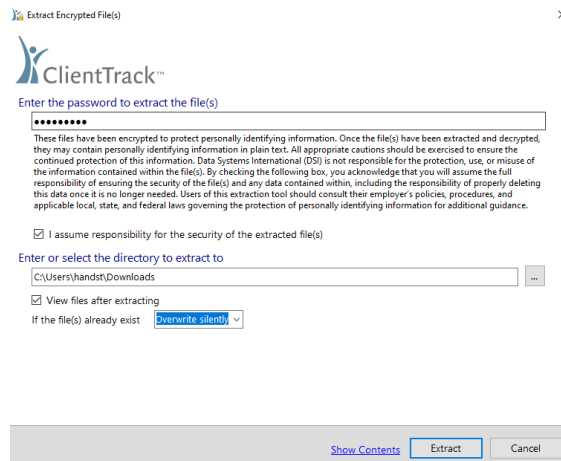
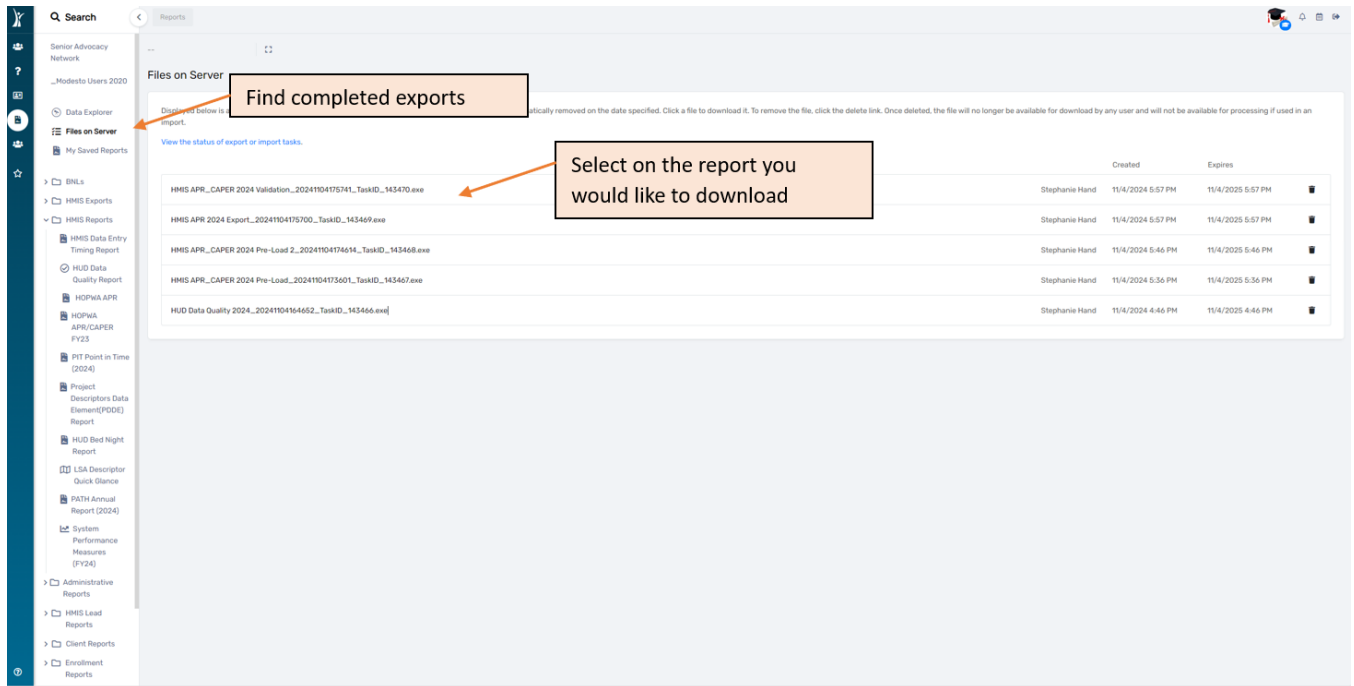


After completing the step above, you will be directed to wait for your export to finalize. You can monitor the progress of the export on [Asynchronous Tasks](#). The encrypted set of files will display on your [Files and Server](#) page when it has completed. Please remember to refresh the Files on Server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

The screenshot displays the 'APR / CAPER - Runs' interface. At the top, there is a search bar and a navigation menu. The main content area shows a table of reports with the following columns: Run #, Fiscal Year, Task ID, Report Run Date, Report Identifier, Begin Date, Project List, End Date, and Drill Down. Two reports are listed:

Run #	Fiscal Year	Task ID	Report Run Date	Report Identifier	Begin Date	Project List	End Date	Drill Down
1400	2024	143469	11/04/2024 11:35AM	Not Specified	11/04/2023	SAN Home Safe HP	11/04/2024	Available for the user the report was requested by
1401	2024	143474	11/04/2024 1:56PM	Not Specified	11/04/2023	TSA Emergency Shelter	11/04/2024	Available for the user the report was requested by

Annotations in the image include a box labeled 'APR/CAPER Review' pointing to the table header and another box labeled 'Select to view' pointing to the first report entry.

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.

**2024 v1.2 CAPER Report**

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

**G4a\_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

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.

4

1 of 1

Search Find | Next

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			
<b>Client ID</b>	<b>Name</b>	<b>Entry Date</b>	<b>Exit Date</b>	<b>Program</b>
<u>53327</u>	Jackson, Clover	3/1/2024	3/3/2024	TSA Emergency Shelter

Select the ClientID to go to the client's dashboard



The screenshot displays a user interface for a client dashboard. At the top, there is a search bar and navigation tabs. The main content area is titled 'Clover Jackson's Dashboard' and includes a profile section with fields for Name, Birth Date, Gender, Client ID, and Race. Below this is a section for 'Clover's Enrollments' which contains a table with columns for Enrollment Description, Active Household Members, Household Type, Project Start Date, Housing Move-In Date, Project Exit Date, Case ID, EnrollID, Days Enrolled, Exit Destination, Organization, Last Assessed, and Program Type. A callout box with an orange background and black border points to a minimized report icon in the left sidebar, with the text 'You can return to the minimized report here'.

## 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.

**Input the reporting dates**

**PATH Annual Report**

**Provides a detailed excel report**

**Provides a Bird's Eye overview**

## 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.

**Select to view client details**

**Select to view Report**

**Your Report is Ready**

Question 8 - 16_Persons served	
Persons served during this reporting period:	Count
8. Number of persons contacted by PATH-funded staff this reporting period	1
9. Number of new persons contacted this reporting period in a PATH-Street Outreach project	0
10. Number of new persons contacted this reporting period in a PATH-Services Only project	1
11. Total number of new persons contacted this reporting period (9 + 10 = total new clients contacted)	1
12a. Instances of contact this reporting period prior to date of enrollment	0
12b. Total instances of contact during the reporting period	0
12c. Number of new persons contacted this reporting period who could not be enrolled because of ineligibility for PATH	0
13a. Number of new persons contacted this reporting period who could not be enrolled because provider was unable to locate the client	0
14. Number of new persons contacted this reporting period who became enrolled in PATH	0
15. Number with active, enrolled PATH status at any point during the date range	0
16. Number of active, enrolled PATH clients receiving community mental health services through any funding source at any point during the reporting period	0

Question 17 - Services Provided	
Type of Service	Number of people receiving service
17a. Re-engagement	0
17b. Screening	0
17c. Clinical assessment	0
17d. habilitation/rehabilitation	0
17e. Community Mental Health	0
17f. Substance use treatment	0
17g. Case management	0
17h. Residential supportive services	0
17i. Housing minor renovation	0
17j. Housing moving assistance	0
17k. Housing eligibility determination	0
17l. Security deposits	0
17m. One-time rent for eviction prevention	0

## 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 contained within the document.

The image displays two side-by-side screenshots of the 'Export Encryption' dialog box. Both screenshots contain the following text:

**Export Encryption**

If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long.

If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information.

Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should *always* be enclosed in double-quotes.

Encrypt Export:

Include Header Row in CSV File(s):

Always Quote CSV Values(s):

ClientTrack is not responsible for the protection, use, or misuse of information contained in the exported file(s).

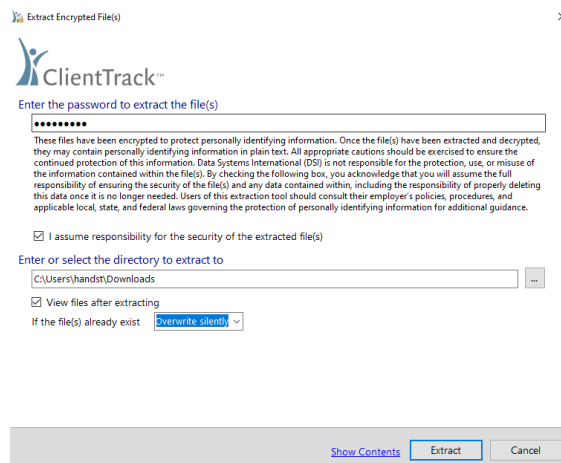
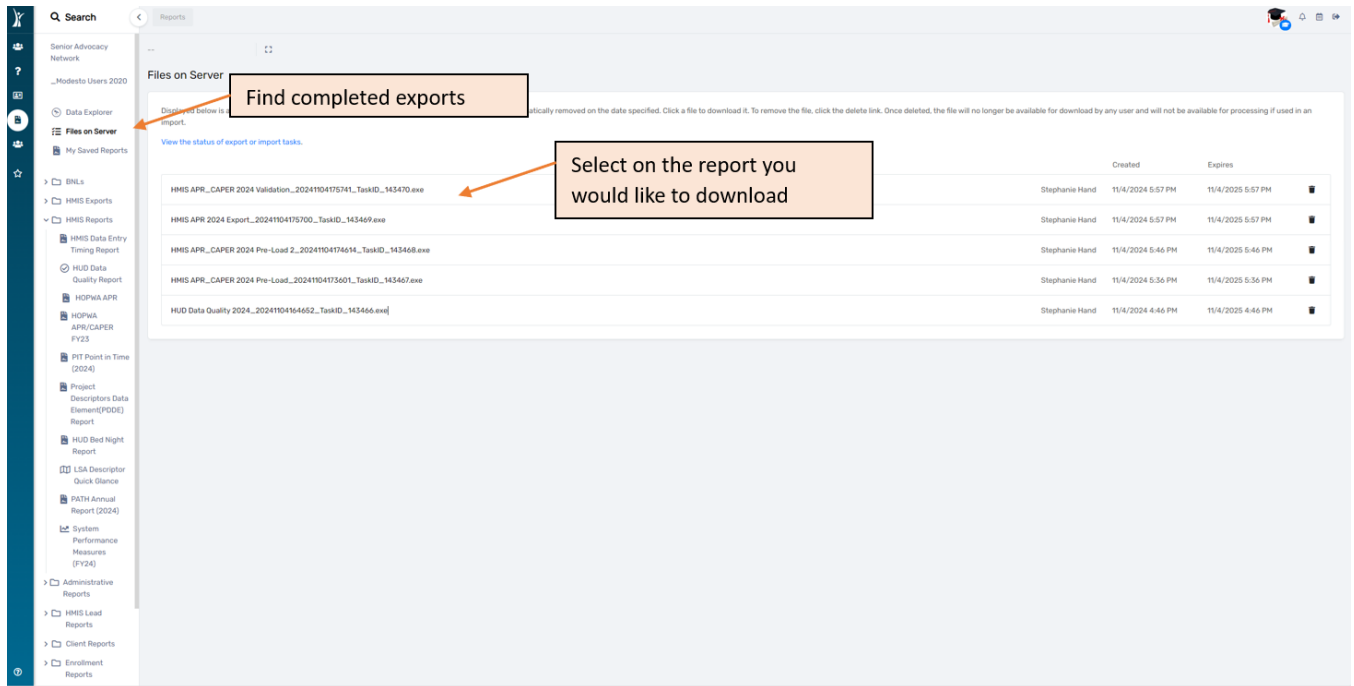
I assume the full responsibility of ensuring the security of the exported file(s) and any data contained within

**Done**

The right screenshot shows the 'Encrypt Export' checkbox selected with a blue checkmark. Below it, there are two input fields: 'Password: \*' and 'Confirm Password: \*', both with empty text boxes. The 'Done' button is also present at the bottom right.

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.

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

## HUD Data Quality Report

This report reviews data quality across many HUD data elements.

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

The screenshot shows the '2024 HUD Data Quality Report' configuration interface. The left sidebar contains a navigation menu with 'HMIS Reports' expanded and 'HUD Data Quality Report' selected. The main content area is divided into sections: Organization, Grant Program, Grant(s), Program, and Detail Export. The Organization section has a dropdown menu with '(CA) HOSST House' and '(CSA) Stanislaus County Community Services Agency' selected. The Grant Program section has 'HUD: CoC' selected for Grant Program and '-- SELECT --' for Grant Component. The Grant(s) section has 'CES Coordinated Assessment' selected. The Program section has 'Coordinated Entry' selected for Program Type and 'CES Coordinated Access' selected for Program. The Detail Export section has 'SSN Masking' set to 'XXX-XX-0000'. At the bottom right, there are buttons for 'Report', 'Schedule Report', and 'Cancel'. Three callout boxes with orange arrows point to specific elements: 'HMIS Reports – HUD Data Quality Report' points to the sidebar menu item; 'Make sure you select the grant(s)' points to the 'CES Coordinated Assessment' selection; and 'Select to provide Bird's Eye overview (aggregate data)' points to the 'Report' button.

### Overview (Bird's Eye View)

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

2024 HUD Data Quality Report

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

ClientTrack

Save or print the report here

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	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 contained within the document.

### Export Encryption

If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long.

If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information.

Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should *always* be enclosed in double-quotes.

Encrypt Export:

Include Header Row in CSV File(s):

Always Quote CSV Values(s):

ClientTrack is not responsible for the protection, use, or misuse of information contained in the exported file(s).

I assume the full responsibility of ensuring the security of the exported file(s) and any data contained within

Done

### Export Encryption

If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long.

If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information.

Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should *always* be enclosed in double-quotes.

Encrypt Export:

Password: \*

Confirm Password: \*

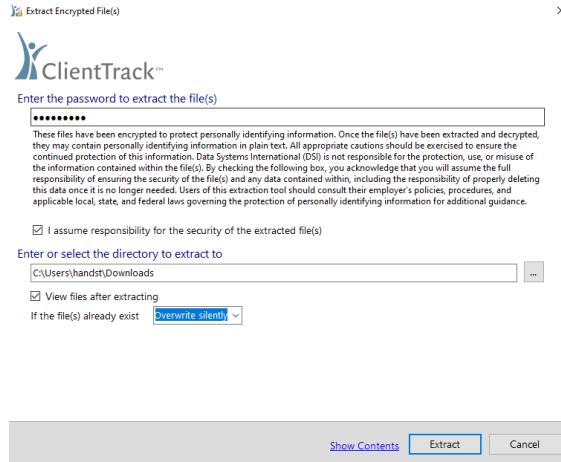
Done

After completing the step above, you will be directed to wait for your export to finalize. You can monitor the progress of the export on [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.

The screenshot shows the 'Files on Server' interface. A search bar is at the top left. The main area displays a list of reports with columns for 'Created' and 'Expires'. Two callout boxes are present: one pointing to the 'Files on Server' header and another pointing to a specific report row.

Report Name	Created	Expires
HMS APR_CAPER 2024 Validation_20241104175741_TaskID_143470.exe	Stephanie Hand 11/4/2024 5:57 PM	11/4/2025 5:57 PM
HMS APR 2024 Export_20241104175700_TaskID_143469.exe	Stephanie Hand 11/4/2024 5:57 PM	11/4/2025 5:57 PM
HMS APR_CAPER 2024 Pre-Load 2_20241104174614_TaskID_143468.exe	Stephanie Hand 11/4/2024 5:46 PM	11/4/2025 5:46 PM
HMS APR_CAPER 2024 Pre-Load_20241104173601_TaskID_143467.exe	Stephanie Hand 11/4/2024 5:36 PM	11/4/2025 5:36 PM
HUD Data Quality 2024_20241104164652_TaskID_143466.exe	Stephanie Hand 11/4/2024 4:46 PM	11/4/2025 4:46 PM



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.

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

We will use the DQ Detailed Export, DQ\_2 Detail (Validation Only) as an example below. The validation will show any Client Doesn't Know/Prefers Not to Answer responses, missing data, and/or data issues.

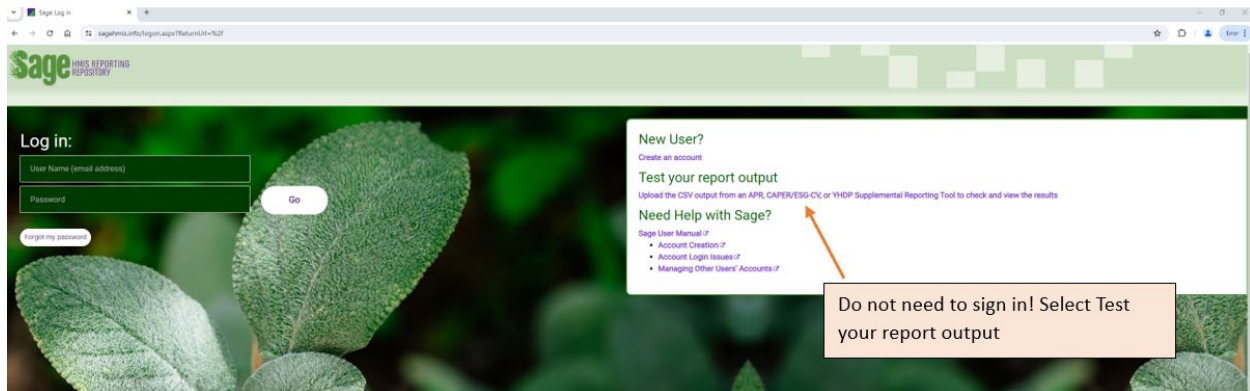
Data Element	clientid	Name	Client Doesn't Know/Prefers Not to Answer	Missing	DataIssue	DataIssue	EnrollID	EnrollDate	ExitDate	ProgramName
Social Security Number (3.2)	53026	Pizza, Small	Yes				137456	11/10/2023 0:00	11/10/2023 0:00	CES Coordinated Access
Social Security Number (3.2)	53027	Pizza, Tiny	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



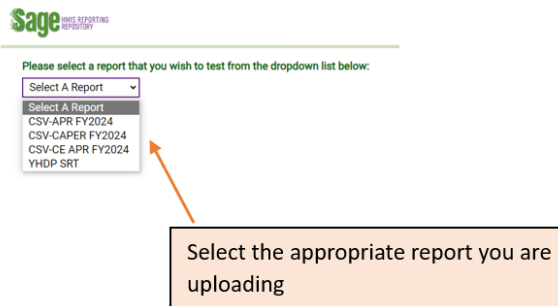
**REMINDER: YOU CAN NOT CHANGE THE DATA ON THE EXCEL SPREADSHEET, YOU MUST CHANGE THE DATA IN HMIS**

## 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](http://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.

**Sage** HGIS REPORTING

### Test a CSV-CAPER FY2024

**This testing page will only allow a single project in your CAPER.**

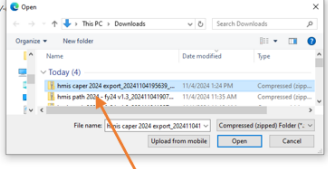
Sage requires a CSV-CAPER generated by your HMIS (or comparable data base for DV providers) in a .zip file, to be uploaded to the system. Follow the steps below to test your CSV-CAPER and/or to create a printable version of your CSV-CAPER.

1. Download the CSV-CAPER from your HMIS or comparable database and save it to your computer. Remember where you place it -- so you can find it.
2. Click the browse button below. Your computer's file directory will appear. Find the CSV-CAPER Report you saved and double click on it.
3. Check the box next to "I am not a Robot" and complete the verification steps if necessary.
4. Click on "Upload and Test" button to upload the file from your computer to Sage.
5. A results message will show:
  - If there are no errors in the file Sage will tell you the CSV passed. Click the "Create Report" button and Sage will produce a printable version of your CAPER.
  - If there are errors, you will need fix the problem(s) in your HMIS or comparable database and download a new CSV-CAPER.
  - You can enter your email address and click "Go" if you want a copy of the errors sent to you. Refer to the Sage guidebook in the Resources tab for additional instructions.
  - If you want to test another CSV, repeat the process outlined above.

Choose File No file chosen

I'm not a robot

[Upload and Test](#)



Upload the "export" file

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.

**Sage** HGIS REPORTING

### CSV-CAPER FY2024 Testing Results - 11/4/2024 4:29 PM

✓ The upload has passed all validations.  
Review the Project Identifiers and Report Validations, then click 'Create Report'.

**STEP 1: Verify this is the correct project for the correct date range**

**Q4a. Project Identifiers**

Organization name	Organization ID	Project name	Project ID	HMIS Project Type	RRH Subtype	Coordinated Entry Access Point	Affiliated with a residential project?	Project IDs affiliated with	CxC Number	Geocode	Victim Service Provider	HMIS Software Name	Report Start Date	Report End Date	Total Active Clients	Total Active Households
Salvation Army ESG	SAL	TSA Emergency Shelter	19611	0		0			CA-510	062292	False	ClientTrack by Ecovis v20	11/4/2023	11/4/2024	122	118

**STEP 2: Review the number of clients being reported on to be sure you have the correct data in the CSV**

**Q5. Report Validations**

Category	Count of Clients for DQ	Count of Clients
1. Total number of persons served	122	122
2. Number of adults (age 18 or over)	121	121
3. Number of children (under age 18)	1	1
4. Number of persons with unknown age	0	0
5. Number of leavers	3	3
6. Number of adult leavers	3	3
7. Number of adult and head of household leavers	3	3
8. Number of stayers	119	119
9. Number of adult stayers	118	118
10. Number of veterans	7	7
11. Number of chronically homeless persons	57	57
12. Number of youth under age 25	4	4
13. Number of parenting youth under age 25 with children	0	0
14. Number of adult heads of household	118	118
15. Number of child and unknown-age heads of household	0	0
16. Heads of households and adult stayers in the project 365 or more days	115	115

**STEP 3: Create the report if everything is correct**

[View your upload](#)

This is not the full report. Select View Your Upload to create the full 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** HHSI SYSTEMS REPORTING

**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 ID 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-610	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%

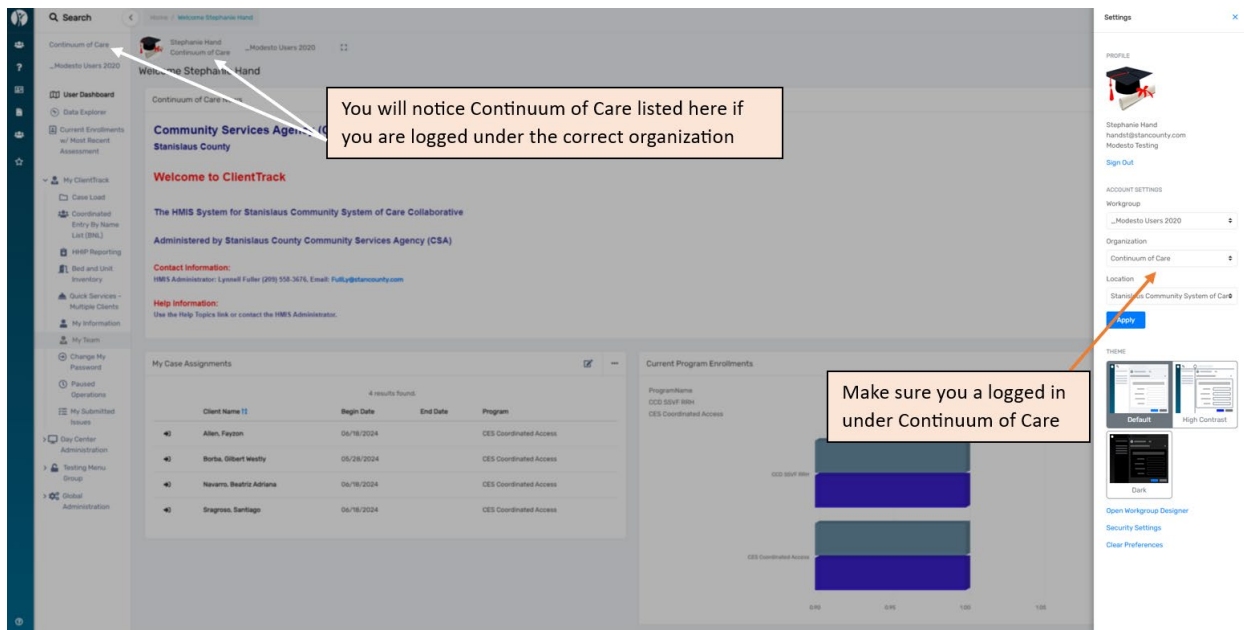
New as of 10/1/2023.

Use to copy the information to your clipboard

## 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 accidentally 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.

Intake 2024 (2322/1B589) \* Jesus Lopez King 5/15/1991 Man (Boy, if child) ClientID 53376

- Basic Client Information
- Family Members
- Program Enrollment
- ★ Lopez King, Jesus Michael
  - Universal Data Assessment
  - Translation Assistance Needed
  - Self Sufficiency Matrix**
  - Triage / Crisis Needs Assessment
  - Complete Housing Needs Assessment?

|| Pause X Cancel

### Self Sufficiency Matrix

Would you like to complete Self Sufficiency Matrix?

Yes
  No

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

Jesus Lopez King 5/15/1991 Man (Boy, if child) ClientID 53376

### Self-Sufficiency Matrix

- 3 - Transportation is available and reliable but limited and/or inconvenient; drivers are licensed and minimally insured
- 4 - Transportation is generally accessible to meet basic travel needs
- 5 - Transportation is readily available and affordable; car is adequately insured
- 6 - Not applicable

Community Involvement:\*

- 1 - Not applicable due to crisis situation; in "survival" mode
- 2 - Socially isolated and/or no social skills and/or lacks motivation to become involved
- 3 - Lacks knowledge of ways to become involved
- 4 - Some community involvement (advisory group, support group) but has barriers such as transportation, childcare issues
- 5 - Actively involved in community
- 6 - Not applicable

Safety:\*

- 1 - Home or residence is not safe; immediate level of lethality is extremely high; possible CPS involvement
- 2 - Safety is threatened / temporary protection is available; level of lethality is high
- 3 - Current level of safety is minimally adequate; ongoing safety planning is essential
- 4 - Environment is safe, however, future of such is uncertain; safety planning is important
- 5 - Environment is apparently safe and stable
- 6 - Not applicable

Parenting Skills:\*

- 1 - There are safety concerns regarding parenting skills
- 2 - Parenting skills are minimal
- 3 - Parenting skills are apparent but not adequate
- 4 - Parenting skills are adequate
- 5 - Parenting skills are well developed
- 6 - Not applicable

Credit History:\*

- 1 - No credit history
- 2 - Outstanding judgments or bankruptcy/foreclosure
- 3 - Has a credit repair plan
- 4 - Moderate credit rating
- 5 - Good credit / manageable debt ratio
- 6 - Not applicable

Matrix Score Summary

The Matrix Score calculates the average of all domain scores between 1 and 5, excluding domains where Not Applicable is selected.

Matrix Score: 2.2

Total score

Save No Changes

## HMIS Triage Assessment

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

The screenshot shows the HMIS Triage Assessment form for Jesus Lopez King. The form is titled "HMIS Triage Assessment" and includes the following fields and options:

- Assessment Date: 05/31/2024
- What is your household type: Household without children
- Information Date: 05/31/2024
- Enrollment: 05/31/2024 - 06/25/2024 - CES Coordinated Access
- Verified by Project: --SELECT--
- Current Living Situation: Place not meant for habitation
- Unsheltered Detail: Living in car, truck or van
- Record Contact:
- Is there violence or conflict in the place you were staying last night: No
- Is your health or safety at risk in the place you were staying last night: Yes

Callout boxes highlight the following information:

- "May be different than Prior Living Situation" points to the Current Living Situation dropdown.
- "Record a Contact or Service here" points to the Record Contact checkbox.
- "Provided answers may populate more questions" points to the Unsheltered Detail dropdown and the Record Contact checkbox.

## 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.

Intake 2024 (2322/1B589) Jesus Lopez King 5/15/1991 Man (Boy, if child) ClientID 53376

- Basic Client Information
- Family Members
- Program Enrollment
- ★ Lopez King, Jesus Michael
  - Universal Data Assessment
  - Translation Assistance Needed
  - Self Sufficiency Matrix
  - Self Sufficiency Matrix
  - Triage / Crisis Needs Assessment
  - Complete Housing Needs Assessment?

Complete Housing Needs Assessment?

Complete Housing Needs Assessment?

Yes

No

Pause X Cancel

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

Intake 2024 (2322/1B589) Jesus Lopez King 5/15/1991 Man (Boy, if child) ClientID 53376

- Basic Client Information
- Family Members
- Program Enrollment
- ★ Lopez King, Jesus Michael
  - Universal Data Assessment
  - Translation Assistance Needed
  - Self Sufficiency Matrix
  - Self Sufficiency Matrix
  - Triage / Crisis Needs Assessment
  - Complete Housing Needs Assessment?
  - VI-SPDAT Type

VI-SPDAT Type

Select the VI-SPDAT type being used

VI-SPDAT (Single Adult)

F-VI-SPDAT (Family)

TAY-VI-SPDAT (Single Youth 18-24)

Pause X Cancel

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.

Intake 2024 (2322/1B589) | Jesus Lopez King | 5/15/1991 | Man (Boy, if child) | ClientID 53376

### Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)

OrgCode Consulting Inc. and Community Solutions are the authors of the VI-SPDAT and F-VI-SPDAT. ClientTrack, Inc. is licensed to include these tools within ClientTrack. The terms of this license require that users must be trained on the use and implementation of the tool by OrgCode Consulting, Inc. or an approved and certified trainer of Licensor. It is not permissible to alter the wording or scoring of the VI-SPDAT or F-VI-SPDAT forms without permission and written consent from Community Solutions and/or Org Consulting, Inc.

Administration VISPDAT 3.0

ClientID: 53376 **Assessment Active**

Interviewer Name:    
 Agency:  Team  Staff  Volunteer   
 Date/Time: 05/31/2024 09:00 AM   
 Assessment Level:  Housing Needs Assessment   
 Enrollment: 05/31/2024 - 06/25/2024 - CES Coordinated Access   
 Assessment Contact Type:  In Person   
 Assessment Location: Stanislaus Community System of Care   
 Assessment Time Start: 05/31/2024 09:00 AM   
 Assessment Time End: 05/31/2024 10:00 AM

Basic Information

First Name: Jesus   
 Last Name: Lopez King   
 Nickname:    
 Race:  American Indian, Alaska Native, or Indigenous   
 Black, African American, or African   
 Hispanic/Latina/Latino   
 Middle Eastern or North African   
 Other   
 Soc Sec No: 621 - 33 - 5285   
 Birthdate: 05/15/1991   
 Gender:  Man (Boy, if child)   
 Woman (Girl, if child)   
 Identifies as LGBTQ2+?  Yes  No   
 In what language do you feel best able to express yourself?    
 Age at Assessment: 33

**Annotations:**

- The interview name will auto populate the user's name & may need to be adjusted
- The demographics will auto populate to what was entered previously in the enrollment

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

Intake 2024 (2322/1B589) | Jesus Lopez King | 5/15/1991 | Man (Boy, if child) | ClientID 53376

### Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)

a. How often do you use a telephone or other voice service?  Yes  No  Prefers not to answer  NA

b. Makes it hard to access housing:  Yes  No  Prefers not to answer  NA

c. Would require assistance to maintain housing:  Yes  No  Prefers not to answer  NA

**SCORE:** 0   
 If YES to any of the Question 25, score 1

26. Are there any medications that, for whatever reason:

a. A doctor said you should be taking but are not taking:  Yes  No  Prefers not to answer  NA

b. You self instead of taking:  Yes  No  Prefers not to answer  NA

c. You use in a way other than how it was prescribed:  Yes  No  Prefers not to answer  NA

d. You find impossible to take, forget to take or choose not to take:  Yes  No  Prefers not to answer  NA

**SCORE:** 0   
 If YES to any of Question 26, score 1

27. Has your homelessness been caused by any recent or past trauma or abuse?  Yes  No  Prefers not to answer

**SCORE:** 1   
 If YES to any of Question 27, score 1

**FINALSORE:** 11

Course of Action B+ Assess for high intensity supports lasting for longer duration of time and perhaps even permanently

CONTACT INFORMATION

On a typical day, what is the best way to reach you?    
 When?  Mornings  Afternoon  Evening  Night  Any   
 If that is unsuccessful, what is the next best way to reach you?    
 Prioritization Status:  Placed on prioritization list

**Annotation:** Final score auto populated here

## 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](#).

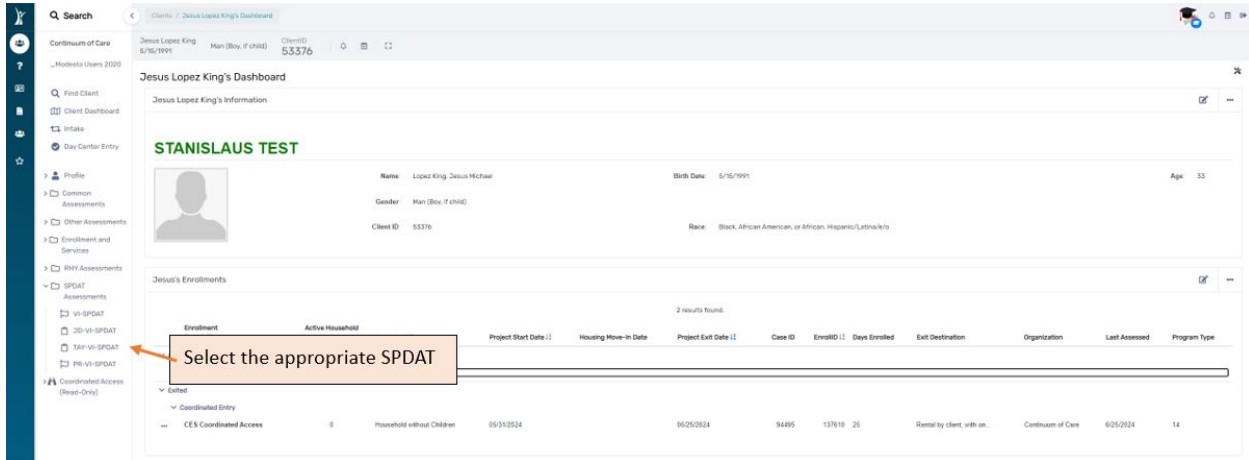


# YOU HAVE COMPLETED YOUR ENROLLMENT!

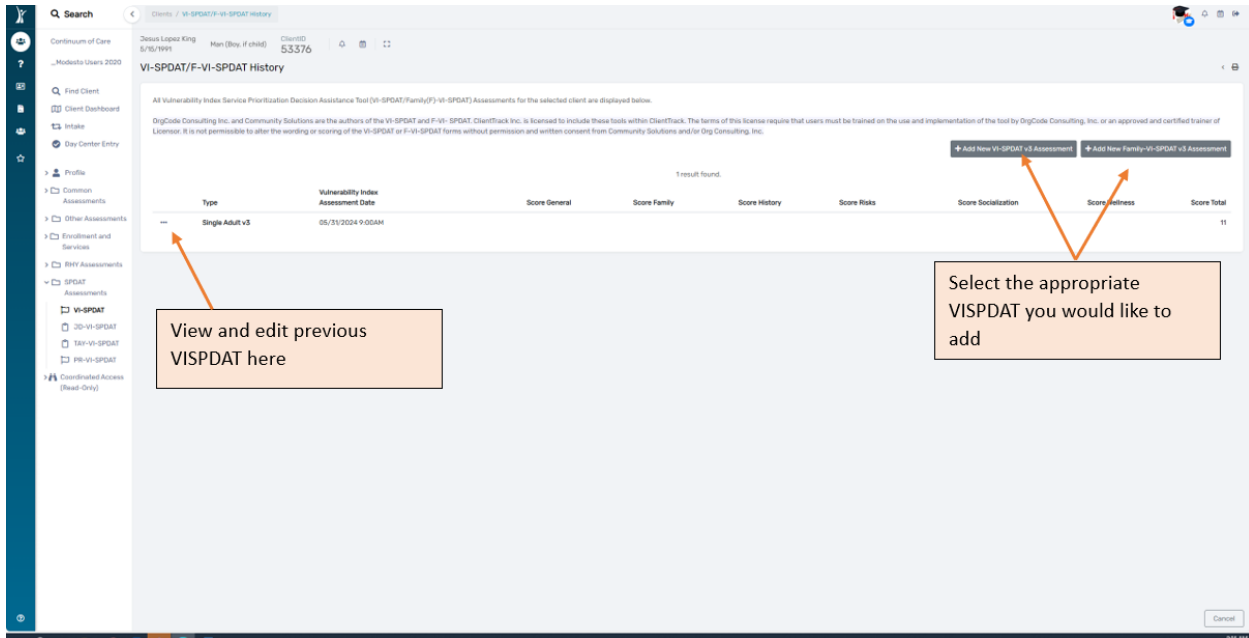
## Entering an Updated VI-SPDAT or Self-Sufficiency Matrix

### VI-SPDAT

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

The screenshot shows the 'Self-Sufficiency Matrix Assessments' page for a client named Dennis Lopez King. The page features a bar chart titled 'Self-Sufficiency Matrix Assessment History' and a table of assessment results. Callouts provide instructions on how to interact with the interface.

**Callouts:**

- Add a new Matrix:** Points to the 'Add New Self-Sufficiency Matrix' button in the top right.
- View and edit previous Matrix here:** Points to the 'Edit' icon next to the assessment record in the table.
- View Self Sufficiency Matrix Assessments:** Points to the 'Self Sufficiency Matrix' folder in the left-hand navigation menu.
- See trends over time with each Matrix entered:** Points to the 'Health' category in the bar chart.

**Table Data:**

Date	Type	Score	Comments
05/29/2024	Entry	220	

## Coordinated Access (Read-Only)

### CE Assessments

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

Search Find Client Client Dashboard Intake Day Center Entry Profile Common Assessments Other Assessments Enrollment and Services RHY Assessments SPDAT Assessments Coordinated Access (Read-Only) CE Assessments CE Barriers CE COVID-19 Vaccines CE Domestic Violence CE Enrollments CE Financial CE Housing Assessment Disposition at Exit CE Release of Information CE Self Sufficiency Matrix CE VI-SPDAT CE TAY-VI-SPDAT CE Universal Data

Clients / Master Assessments Ryan Arroyo 5/15/1991 Man (Boy, if child) ClientID 53415

Master Assessments

Below is a list of Master Assessments that have been created for this client. Please use the HMS workflows to add or edit assessments.

3 results found.

Date II	Program	Type	Assessor	Comments	AssesID II
10/01/2024	CES Coordinated Access	Exit	Stephanie Harz		229900
09/16/2024	CES Coordinated Access	During Program Enrollment/Update	Stephanie Harz		229899
09/01/2024	CES Coordinated Access	Entry	Stephanie Harz		229898

Cancel

## 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.

Search Find Client Client Dashboard Intake Day Center Entry Profile Common Assessments Other Assessments Enrollment and Services RHY Assessments SPDAT Assessments Coordinated Access (Read-Only) CE Assessments CE Barriers CE COVID-19 Vaccines CE Domestic Violence CE Enrollments CE Financial CE Housing Assessment Disposition at Exit CE Release of Information CE Self Sufficiency Matrix CE VI-SPDAT CE TAY-VI-SPDAT CE Universal Data

Clients / Enrollments Jasper King 8/15/1991 Man (Boy, if child) ClientID 53033

Enrollments

All of client's enrollments display below. An enrollment represents a defined period of participation in a grant and/or program. From here, you can enroll a client in a program, exit them from an existing program or perform annual assessment updates.

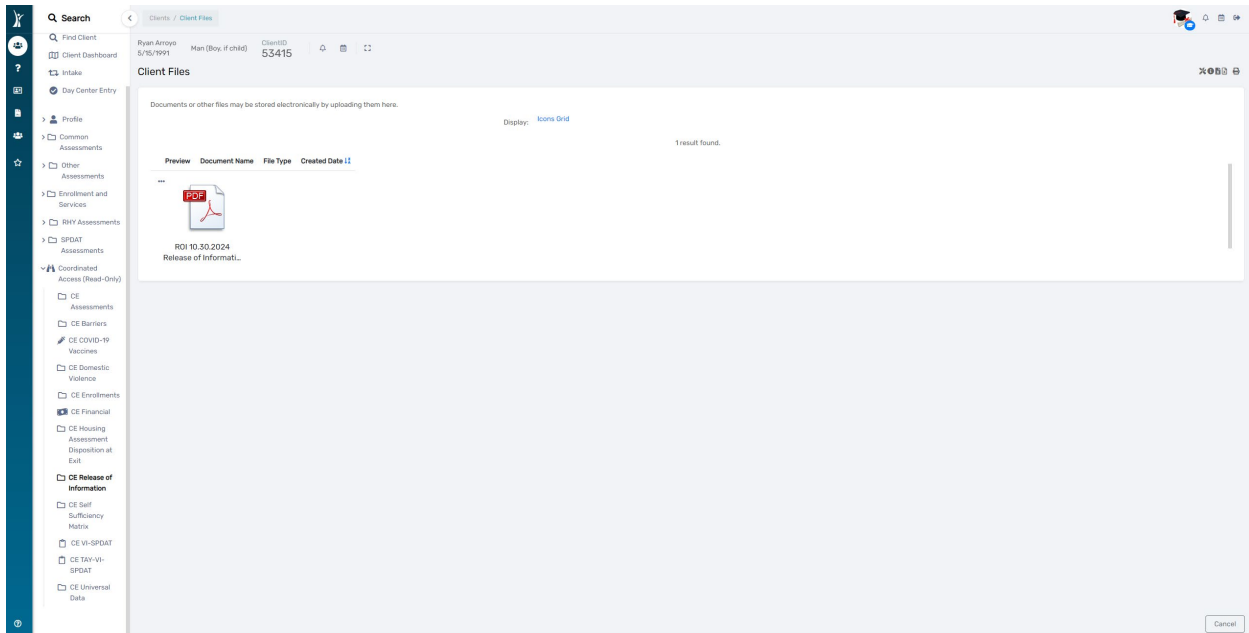
5 results found.

Enrollment Description	Case Members	Project Start Date II	Housing Move-In Date	Exit Date II	Exit Destination	Organization
Current						
CSA TEST ES	2	08/14/2024				(CSA) Stanislaus County Community Services Agency
CCD \$5VF HP	1	07/26/2024				Catholic Charities Diocese of Stockton
WE CARE WINTER SHELTER	1	08/30/2023				We Care
CHSS HDAP RRH	1	08/15/2023				Community Housing and Shelter Services
Previous						
WE CARE WINTER SHELTER	1	08/01/2022		08/23/2022	Jail, Prison, Juvenile De...	We Care

Cancel

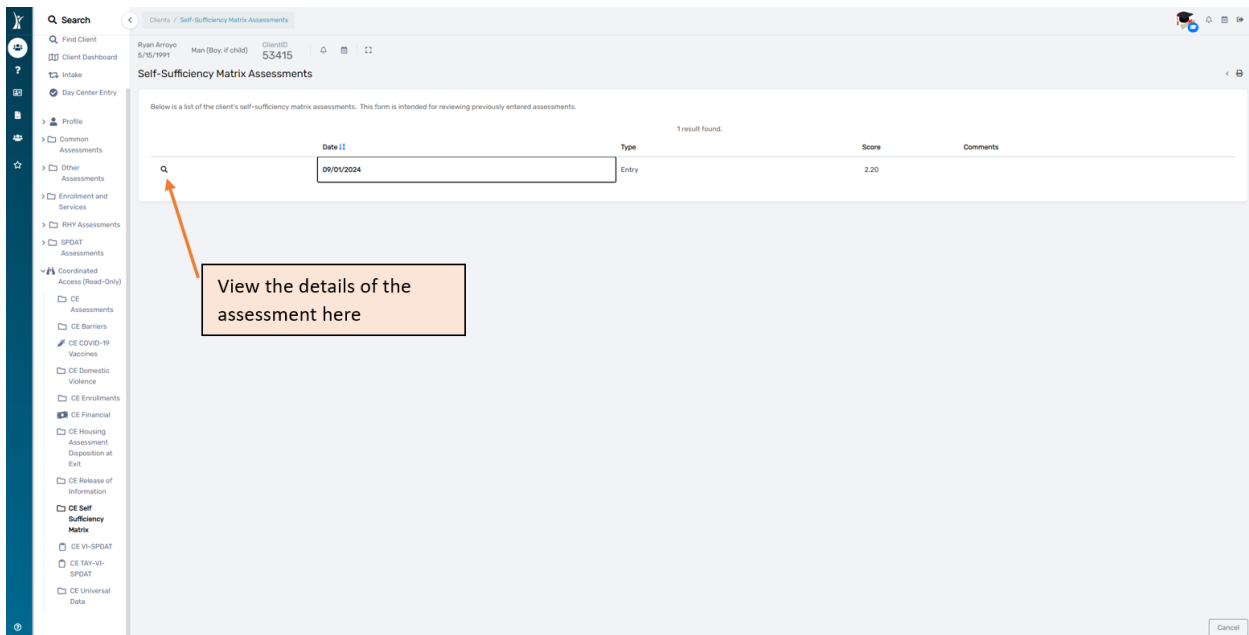
## CE Release of Information (ROI)

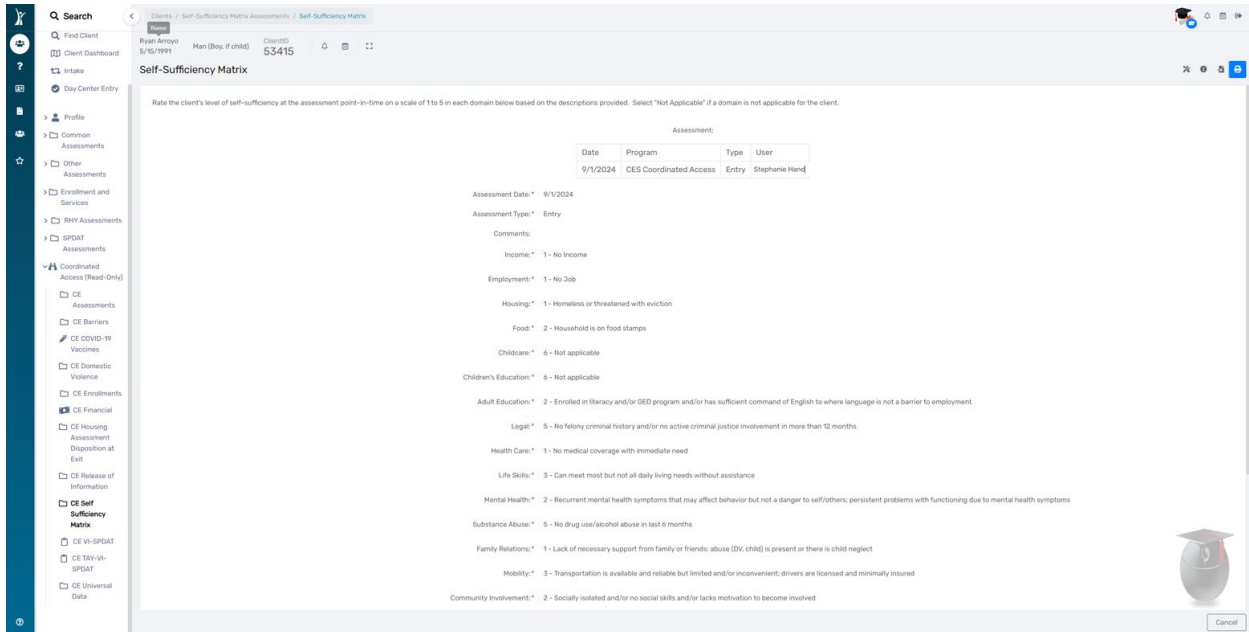
This screen allows the user to be directed to the Client Files page to view any uploaded ROIs.



## CE Self Sufficiency Matrix

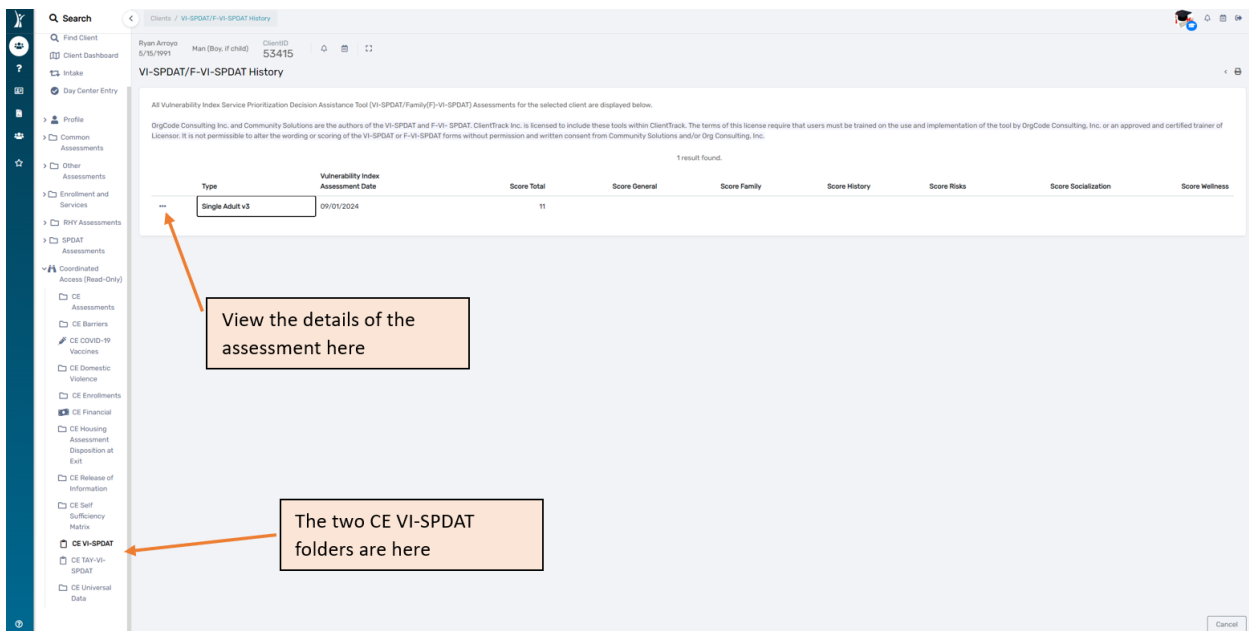
This screen allows the user to view all Self Sufficiency Matrix Assessments for clients. You may select the viewfinder button to view each recorded assessment.





## 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.



Search Find Client Client Dashboard Intake Day Center Entry Profile Common Assessments Other Assessments Enrollment and Services RHY Assessments SPDAT Assessments Coordinated Access (Read-Only) CE Assessments CE Barriers CE COVID-19 Vaccines CE Domestic Violence CE Enrollments CE Financial CE Housing Assessment Disposition at Exit CE Release of Information CE Self Sufficiency Matrix CE VI-SPDAT CE TAV-VI-SPDAT CE Universal Data

Clients / VI-SPDAT-F-VI-SPDAT-History / Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)

Ryan Arroyo 5/15/1991 Man (Boy, if child) ClientID 53415

Vulnerability Index (VI) and Service Prioritization Decision Assistance Tool (SPDAT)

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Administration: VISPDAT 3.0

Assessment:

Date	Program	Type	User
9/1/2024	CES Coordinated Access	Entry	Stephanie Hand

ClientID: 53415  
Interviewer Name: Stephanie Hand

Agency: Date/Time: 9/1/2024 12:00:00 AM

Assessment Level: Crisis Needs Assessment

Assessment Time Start: 9/1/2024 9:00:00 AM Assessment Time End: 9/1/2024 10:00:00 AM

Basic Information

First Name: Ryan  
Last Name: Arroyo  
Nickname:  
Race: Black, African American, or African, Hispanic/Latino/a/o  
Soc Sec No: 621-33-6633  
Birthdate: 05/15/1991  
Gender: Man (Boy, if child)  
Identifies as LGBTQ2+? Yes  
In what language do you feel best able to express yourself? 33  
Age at Assessment: 33  
Previous SPDAT completed on: 9/1/2024 12:00:00 AM  
VI-SPDAT Previous Score: 11

Cancel

## CE Universal Data

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

Search Find Client Client Dashboard Intake Day Center Entry Profile Common Assessments Other Assessments Enrollment and Services RHY Assessments SPDAT Assessments Coordinated Access (Read-Only) CE Assessments CE Barriers CE COVID-19 Vaccines CE Domestic Violence CE Enrollments CE Financial CE Housing Assessment Disposition at Exit CE Release of Information CE Self Sufficiency Matrix CE VI-SPDAT CE TAV-VI-SPDAT CE Universal Data

Clients / Universal Data Assessments

Ryan Arroyo 5/15/1991 Man (Boy, if child) ClientID 53415

Universal Data Assessments

Below is a list of the client's history of universal data elements. To create a new record, click **Add New Universal Data Assessment**. To edit an existing record, click **EDIT**. Please note that in most cases you will want to add new or edit using the HMS workflows.

3 results found.

Date	Program Name	Assessment Type	Housing Status	Prior Residence	Length of Stay
10/01/2024	CES Coordinated Access	Exit			
09/16/2024	CES Coordinated Access	During Program Enrollment/Update			
09/01/2024	CES Coordinated Access	Entry		Place not meant for habitation	One year or longer

View the details of the assessment here

Cancel

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links.

Date	Program	Type	User
10/1/2024	CES Coordinated Access	Exit	Stephanie Hand

Assessment Date: 10/1/2024  
 Age while in project: 33  
 Assessment Type: Exit

Health Insurance  
 Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Covered by Health Insurance: Yes

Type	Status	Reason No	Other Coverage
Private Pay Health Insurance	No		
Medicare	No		
Medicaid	No		
<input checked="" type="checkbox"/> Health Net (Medi-cal) - Adults	Yes		
Health Net (Medi-cal) - Children	No		
Health Plan of San Joaquin (Medi-cal) - Adults	No		
Health Plan of San Joaquin (Medi-cal) - Children	No		
State Children's Health Insurance Program (Medi-cal)	No		

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.

Jennifer Frye  
4/12/1992  
Woman (Girl, if child)  
ClientID: 53062

Status	Service	Provider	Date	Incoming	Assess (in ms.)							
Jennifer Frye's Information												
<b>STANISLAUS TEST</b>												
	Name: Frye, Jennifer	Birth Date: 4/12/1992	Age: 31									
	Gender: Woman (Girl, if child)	Client ID: 53062	Race: American Indian, Alaska Native, or Indigenous									
Jennifer's Enrollments												
1 result found.												
Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Emergency Shelter - Entry Exit												
TSA ACES	1	Household without Children	01/17/2023			94374	137475	322		Salvation Army ESO	1/17/2023	0
Jennifer's Services												

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.

The screenshot shows the Client Dashboard for Jennifer Frye. At the top, the client's name, gender, and Client ID (53062) are displayed. Below this, the name 'STANISLAUS TEST' is shown in green. The client's profile includes a placeholder for a photo and fields for Name, Birth Date, Gender, Client ID, and Race. A user menu for Lynnell Fuller is visible in the top right corner. The 'Jennifer's Enrollments' section shows a table with one entry: 'CES Coordinated Access' under the 'Coordinated Entry' category. The table columns include Enrollment Description, Active Household Members, Household Type, Project Start Date, Housing Move-in Date, Project Exit Date, Case ID, EnrollID, Days Enrolled, Exit Destination, Organization, Last Assessed, and Program Type.

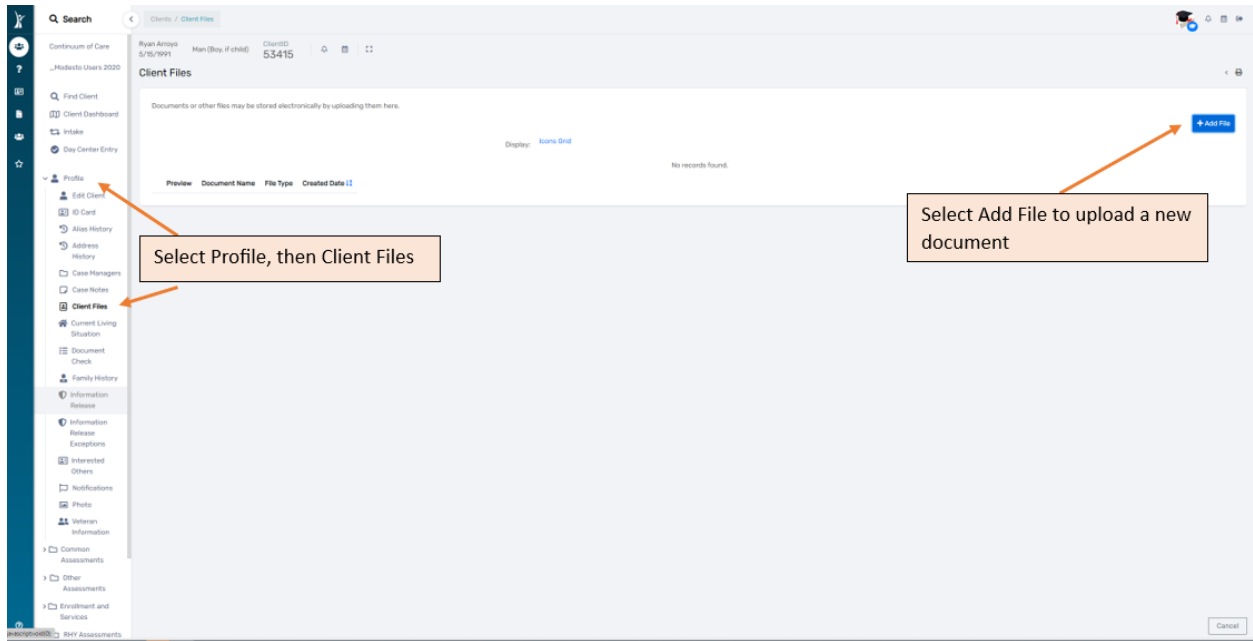
Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-in Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Coordinated Entry CES Coordinated Access	0	Household with Children and Adults	12/10/2022		12/10/2022	93865	136868	0	No exit interview complet...	Continuum of Care	12/10/2022	14

**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.

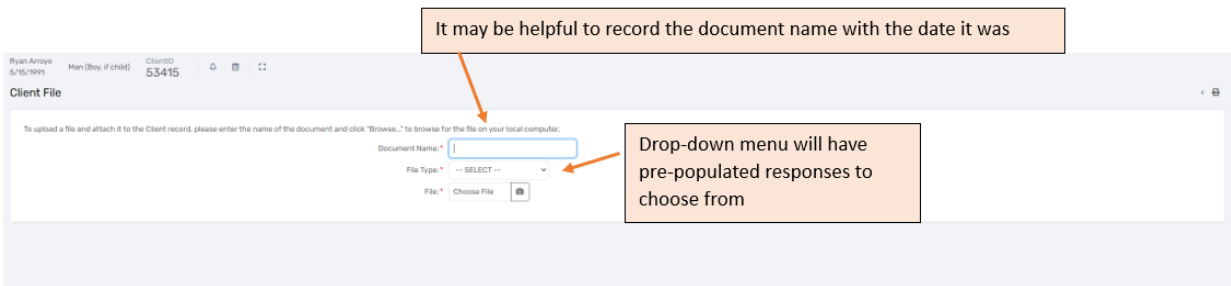
### Scan the Release of Information and VI-SPDAT Into HMIS

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.

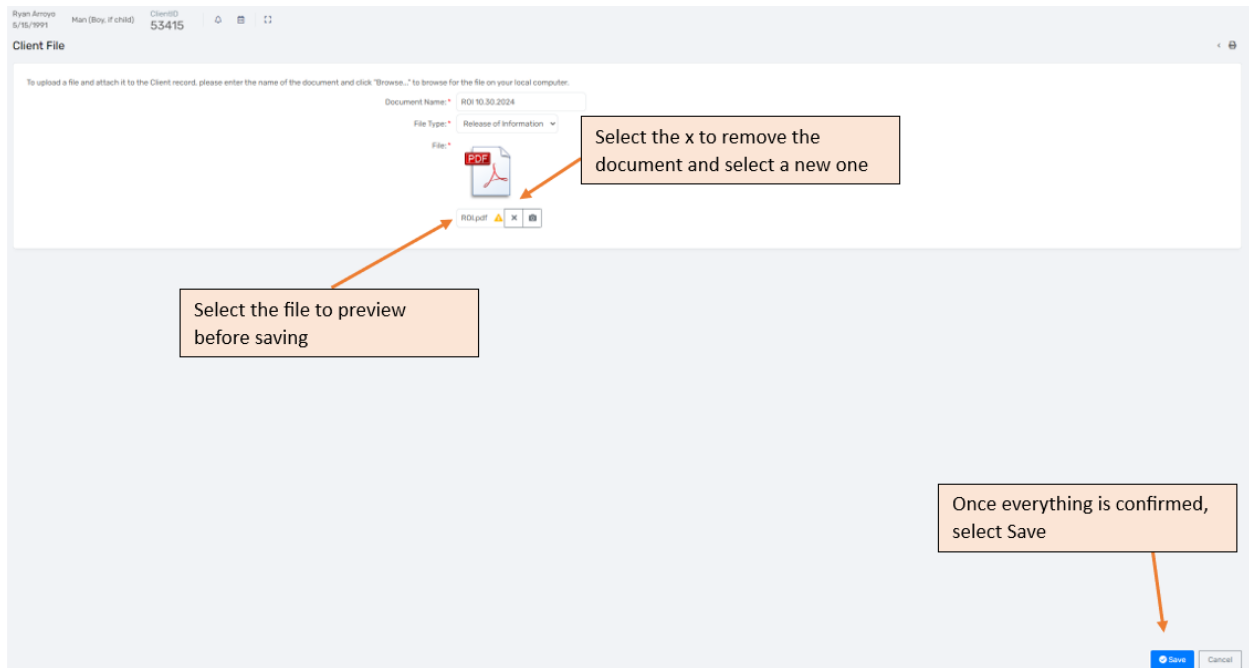




Complete the Document Name, File Type, and upload the file. **Note:** The File Type field will be a drop-down menu that includes Release of Information, VI-SPDAT, or Other. **Note:** You will have to scan the document to save on your desktop. Once it is uploaded, you must delete the document, DO NOT 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.

