

HMIS Training

DC 106: VIRGINIA WILLIAMS ENTRY EXIT WORKFLOW



Agenda

•Visibility Basics

•Common Questions

•Enter Data As Basics

•When to EDA

Data Security

Additional Resources

•EDA and Data Sharing



Visibility Basics

Who Can See What?

Visibility

•The database contains hundreds of thousands of client files, each with dozens of project stays, services, and case notes.

•Having a visibility structure is important to ensure client information is protected, while also ensuring agencies and programs are able to work together to help clients.

•Client choice to share their program level information is at the heart of our visibility structure.





Visibility Basics – Current Structure





HUD UDEs – What's Shared & What Isn't

UNIVERSAL IDENTIFIERS (ONE ANSWER PER CLIENT RECORD)

- •Name
- •Name Data Quality
- Social Security Number
- Social Security Number Data Quality
- Date of Birth
- Date of Birth Data Quality
- Race
- Ethnicity
- Gender
- Veteran Status



- UNIVERSAL PROJECT STAY ELEMENTS (ONE OR MORE VALUES PER PROJECT STAY) • Disabling Condition (Yes/No) • Project Start Date • Project Exit Date • Destination • Relationship to Head of Household • Client Location
- •Housing Move in Date (for RRH and Permanent Housing projects)
- Prior Living Situation



Family Shelter, Outreach, and Prevention

- This is a group of programs that are sharing client program data amongst themselves
 - Release of information (ROI) signed at Virginia Williams allows this to happen.
- Temporary Shelters for Families
- Overflow motels/hotels for Families
- Virginia Williams
- Homeless Prevention Programs for Families
- Short Term Family Shelters
- ALL Client data created by these programs are shared with the other programs
 - AS LONG AS the information is tagged as coming from one of the following programs.
 - If it is coming from a different program (even within an Agency that has one of those programs) it will not be shared per the agreement of the ROI.



Enter Data As Basics



What is Enter Data As?



- Most agencies have multiple programs that they operate. These often are in different buildings.
- Using Enter Data As is like physically going from one program to another but within the Database.



Why use Enter Data As?

- Allows for you to see what is shared with individual programs.
- •Allows others to see data from your shelter/prevention/outreach program
- You no longer have to manually change your provider in your
 - Entry/exits
 - Goals
 - Case plans
 - Case notes
 - Case managers
 - Services
 - File attachments



• When you log into HMIS, go to the top right corner and click on the Enter Data As button





En	ter	Dat	a As	Pro	vide	er S	earcl	h													×
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Sea	rch	for Pi	ovide	rs by	using	g key	/words	from	the Prov	ide	r Name o	r Des	crip	tion.							
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En	Enter or scan a Provider ID number to search for that Provider.																				
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																				Ex	it

• Find the program you are going to be doing data entry as.

- You can search in the search box
- You can type in the provider id
- You can look through the list of options for the correct provider



• When you find the correct program, click the green plus sign.

Ent	Enter Data As Provider Search																					
	P	rovid	er S	ear	ch																	
Sea	rch f	for Pro	vider	s by	using	j ke	yword	s from	the Pr	ovide	er Name	e or l	Desc	cript	ion.							
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	Provider Search Results																					
#	A	B C	D	Ε	F	G	ΗI	J	K L	м	N O	Р	Q	R	S	т	U	v	w	x	Y :	z <u>All</u>
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	Showing 1-4 of 4																					
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• When you click the green plus sign, the name of the provider you will be doing data entry as will appear next to Enter Data As.



• To remove the EDA click on the name of the provider (blue text).





When to EDA

- Doing Data Entry
- Looking at client files
- Running Canned HMIS Reports

Searching for a Client



•You will need to search for a client in order to add the client to your program

•You can search for the client by name, or if you know the client's ID #, you can use that.



Client Search Please Search the System before adding a New Client. Items in Italics are for Data Entry ONLY and will not be used for Search Results. Middle Suffix Last First Name 1 3 2 Name Data Quality -Select-Date of Birth \sim Alias DOB Data Quality -Select- \sim Social Security -Select-Gender \sim Number Social Security -Select-Primary Race -Select- \sim \sim Number Data Quality U.S. Military -Select--Select-Secondary Race \sim \sim Veteran? Ethnicity -Select-Exact Match \sim Add New Client With This Information Clear Search **Client Number** Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #

Submit

Creating a new client file



•If you do not find a client record for the client you are serving, you will need to create a new client record.

•This is done from the Search box in ClientPoint.



Client Search		
	Please Search the System of	/stem before adding a New Client. / ONLY and will not be used for Search Results.
Name	First Middle Las	st Suffix
Name Data Quality	Full Name Reported 🗸	Date of Birth 11 / 03 / 1983 🔊 🖏
Alias		DOB Data Quality Full DOB Reported (HUD)
Social Security Number	845 - 54 - 6321	Gender Female ~
Social Security Number Data Qual	ty Full SSN Reported (HUD)	Primary Race Asian (HUD)
U.S. Military Veteran?	Yes (HUD) V	Secondary Race -Select-
Exact Match		Ethnicity Non-Hispanic/Non-Latino (HUD) V
Search C	ear Add New Client With This Information	
Client Numbe	r	

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #

Submit

Completing the Client Profile Information



•Once in the Client record in ClientPoint, navigate to the Client Profile.

•If there is any missing or incorrect information in the Client Record or Client Demographic sections, click the corresponding Edit Pencil(s) to make the necessary changes.

The Community Partnership For The Prevention of Homelessness

Release of In	formation: No	ne						-Switch	n to Anoth	er Hou	sehold M	1ember- v	Subn
nt Informati	on					Servi	ce Transac	tions					
ımmary	Client Pro	file He	ouseholds	ROI	Entry /	Exit	Case Man	agers	Case Pla	ns ĭ	Measur	ements A	ssessme
Client	Record								Issu	ue ID C	Card	1	R
Name		Solo, H	lan										
Name Da	ta Quality	Full Na	me Reported	ł									A.
Alias		Scruffy	Nerf Herder									- 4	
Social Se	curity	202-20	-2020									Change	Clear
SSN Data	Quality	Full SS	N Reported (HUD)									
U.S. Milita	ary Veteran?	Yes (Hl	JD)										
Age		25											
Client	Demograph	ics											8
Date of Bir	th	05/02/1	1994										
Date of I	Birth Type	Full DO	B Reported (HUD)									
Gender		Male											
Primary Ra	ice	White (HUD)										
Secondary	Race												
Ethnicity		Non-His	spanic/Non-L	atino (HUD).									
										Save	Sa	ve & Exit	Exit



Creating a Household

The Community Partnership For The Prevention of Homelessness

•Often, existing client records are a part of existing households.

•Use existing households wherever possible.

•If the household does not yet exist, you will need to create a new one.



To create a new Household, navigate to the Household Tab.

Click "Start New Household"

Clie	nt Information					Se	rvice Transaction	5		
Su	mmary Clie	ent Profile	Households	ROI	Entry / I	Exit	Case Managers	Case Plans	Measurement	Assessments
	💋 Client Rec	ord						Issue	ID Card	
	Name	Fa, I	Mulan							5 6
	Name Data Qu	uality Full	Name Reported						9	
	Alias								2	
	Social Security	y 854	-54-6321						C	hange Clear
	SSN Data Qua	lity Full	SSN Reported (H	UD)						
	U.S. Military Veteran?	Yes	(HUD)							
	Age	35								

Client Inform	ation				Service Transactions										
Summary	Client Profile	Households	ROI	Entry / E	xit	Case Managers	Case Plans	Measurements	Assessments						
▶ Prev	 This Client is not currently a member of any Households. Previous Households 														
Search Exis	ting Households	Start New Hou	sehold						Exit						

Choose the Household Type

If you know the household member's HMIS ID#, type it in the Client ID # and click "Submit"

If you do not know the household member's HMIS ID #, Search for the client

Ad	d New H	ousehold					R	
ſ	House	hold Type						
	Househo	Id Type* -Selec	t-	~				The Community Partnership
	Client	Search						of Homelessness
			() Ple	ease Search the System be	ore adding a New Client.	Hide Advanced	Search	
		•	Items in Italics are for Dat	ta Entry ONLY and will not b	e used for Search Results.			
	Name	First	Middle	Last Fa	Suffix			
	Name Data Quality	-Select-		✓ Date of/				
	Alias			DOB Data Quality -Select	-	~		
	Social Security Number			Gender -Select	-		~	
	Social Security Number Data Quality	-Select-	~	Primary Race -Select	-	~		
	U.S. Military Veteran?	-Select-	~	Secondary Race -Select	-	~		
	Exact Match			Ethnicity -Select	- v]		
	Search Client	Clear	Add New Client With This In	formation				
E	nter or Sca	n a Client ID to add th	at Client to this Household.					
C	lient ID #		Submit					
	Select	ed Clients		•				
	ID I	lame	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count	
	392923	Fa, Mulan	854-54-6321	11/03/1983		Female	ο 🔍	
				Showing 1	-1 of 1			
						Continue	Cancel	

Choose the Household Type

If you know the household member's HMIS ID#, type it in the Client ID # and click "Submit"

If you do not know the household member's HMIS ID #, Search for the client

If the client appears in the Client Results Section ensure it is the correct client, and then select the green plus sign to add the client to the household.

ousehold Type				
sehold Type* Two Parent Family	~			
lient Search				
	Please Search the Sy	stem before adding a New Client.	Hide Advance	d Search
👔 Items in Italic	s are for Data Entry ONLY and w	ill not be used for Search Results.		
First Middle	Last	Suffix		
me Han	Solo			
me ta Full Name Reported ality	Date of Birth	/ / 🧖 🧟 🥸		
as	DOB Data Quality	-Select-	~	
cial curity	Gender [-Select-		~
cial surity mber -Select- ta ality	Primary Race	-Select-	×	
itary eran?	Secondary Race	-Select-	~	
act Ltch	Ethnicity [-Select-	2	
arch Clear Add New Client Wi	th This Information			
lient Number				
or Scan a Client ID to add that Client to this	Household.			
ID # Submit				
lient Results				
Name Social Sec	urity Date of Birth	Alias	Gender Banne	d Househol
Solo, Han 202-20-2	2020 05/02/1994	Scruffy Nerf Herder	Male	1 0
5676 solo, hans	01/19/1998		Other	0 0
	S	howing 1-2 of 2		
elected Clients				
Name Social Sec Number	urity Date of Birth	Alias	Gender Banne	d Househol Count
2923 Fa, Mulan 854-54-	6321 11/03/1983		Female	0 🔍
	S	howing 1-1 of 1		

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ness

If the client doesn't appear in the search, add the new client in the Add New Household Tab.

You MUST search for the client record before you are able to create a new client record.

You MUST enter all the information indicated BEFORE you click "Add New Client With This Information"

Household Typ	e							
Household Type *	Two Parent Fa	mily	~					
Client Search								
			Diance Course the	Sustan bafasa	adding a New Client	Uide A	duanaaa	Canada
	A Item	s in Italics are for D	ata Entry ONLY and	d will not be use	d for Search Results	nice A	uvanceu	Joearch
First		Middle	Last		Suffix			
Name								
Name Data -Select- Ouality			Date of Birth		<u> M</u> 🔿 👰			
		1	DOB					
Alias			Data Quality	-Select-			~	
Social Security	-		Gender	-Select-				
Number								~~~~
Social Security			Primary					
Data		``````````````````````````````````````	Race	-Select-			×	
Quality U.S								
Military Veteran?		~	Secondary Race	-Select-			\sim	
Exact			Ethnicity	-Select-				
Match 🗀			Lonnery	beleet	~			
Search Clea	ar Add New	Client With This In	formation					
Client Number								
r or Scan a Client I	D to add that Clie	ent to this Househo	ld.					
ID #		Submit						
Client Results								
D Name		Social Security Number	Date of Birth		Alias	Gender	Banned	Household Count
365676 solo, hans			01/19/1998			Other		0 🔍
				Showing 1-1 o	f 1			
Selected Client	5							
ID Name	5	Social Security Number	Date of Birth	,	lias	Gender	Banned	Household Count
392923 Fa, Mulan		854-54-6321	11/03/1983			Female		0 🔍
o		202-20-2020	05/02/1994	:	5cruffy Nerf Herder	Male		1 Q
9 5010, Han								



Client Number Enter or Scan a Client ID to add that Client to this Household. Client ID # Submit **Client Results** Household Count Social Security Gender Banned Date of Birth Alias ID Name Number No matches. Selected Clients Household Social Security Gender Banned Date of Birth ID Alias Name Number Count 392923 Fa, Mulan 854-54-6321 0 11/03/1983 Female 0 392928 Solo, Chewbacca, Jr Other 0 05/03/2009 \bigcirc Solo, Han 202-20-2020 05/02/1994 Scruffy Nerf Herder Male 1 9 Showing 1-3 of 3 Continue Cancel

Once the household is fully built, Click Continue. In the Household Members section, assign 1 person as Head of Household = Yes. This will automatically make the client's relationship to Head of Household = Self.

Then select the Relationship to Head of Household for the other household members.

When complete, click "Save & Exit"

Ho	usehold In	forn	nation	- (5	4915) Two Parent Fa	amily				đ	
Ì	(54915) T	wo F	Parent	Fami	v		Save	Sa	ave & Exit	Exit	
	Household	і тур	e*	Two	Parent Family	~					The Community Partnersh
	Income			US\$	700.00 monthly (US\$8,40	0.00 annual) 🔍				For The Prevention
	Client Cour	nt		3							
~	Househol	d Me	mbers								
	Name	Age	Head	of shold	Relationship to Head Household	of	Joined Househ	old *	Previous	Household	d
•	(392923) Fa, Mulan	35	Yes	~	Self	~	10 / 29 / 2019	17. P.	0 🔍	1 🔍	
•	(392928) Solo, Chewbacca,	10	No	~	step-son	~	10 / 29 / 2019	<u>7</u> , 2	0 🔍	1 🔍	_
•	Jr (9) Solo, Han	25	No	~	husband	~	10/29/2019	<u>7</u> , 2	o 🔍	2 🔍	
A	dd/Delete Ho	useh	old Mem	bers					Household H	listory Report	
<u> </u>	Househo	ld M	embers	;	🖉 Client Record	ł			Issue I	D Card 🛛 🔬	
	(392923) Fa	a, Mul	an		Name	Fa, Mula	an				
	(392928) So	olo, C	hewbacca	a, Jr	Name Data Quali	ty Full Nar	me Reported				
	Age: 10 (9) Solo, Har	n			Alias Social Security	954 54	6201				
	Age: 25				SSN Data Quality	Full SSI	-0321 N Reported (HUD)				
					U.S. Military Veteran?	Yes (HL	(DI)				
					Age	35					
					Household Pro	file Assess	ment				1
					No Household Profile A	ssessment i	s specified for this	Provider			
							Save	s	ave & Exit	Exit	

Creating an Entry

•To document the household's participation in the program, you need to create an Entry.

•Navigate to the Entry/Exit Tab.

Cli	ent Information				Service	e Transa	actions			
5	Summary Clien	t Profile Households	ROI	Entry	/ Exit 🛛 Cas	se Mana	agers) (Case Plans	Measurements	Assessments
A	dded to the system 1	0/29/2019 12:01 PM)
	Name	Fa, Mulan			Gender	Fe	emale			
	Date of Birth	11/03/1983 (Age 35)			Primary Rac	ce As	sian (HUE	D)		5 0
	Social Security	854-54-6321			Secondary Race				2	
					U.S. Military Veteran?	Ye	es (HUD)			

Client Inform	ation) s	ervice Transaction	5			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Measurements	Assessments	
	🚺 Remi	nder: Household	d members m	ust be establishe	d on Households tab l	before creating E	Entry / Exits		The Community Partnershi For The Prevention
Entry /	/ Exit		,	Гуре	Project Start	Exit Date	Interims Fo	llow Client	of Homelessness
Add Entry	y / Exit				Date No matches.		u	Jps Count	
)							Exit	
						Project Sta	rt Data - (3929	23) Fa, Mulan	X
 C S b C S C 	Click "Add Er elect the m being served Choose the d et the Proje Click Save &	ntry/Exit" embers c l. correct Ty ect Start I Continue	of the ho vpe Date	ousehold t	hat are	House 1 To in ○ (5491) ○ (392) ○ (392) ○ (392) ○ (9) S Project	hold Members nclude Household Only me 5) Two Parent Fa 923) Fa, Mulan 928) Solo, Chewba olo, Han t Start Data - (39	d members for the mbers from the mily cca, Jr 92923) Fa, Mula	this Entry / Exit, click the box beside each name. e SAME Household may be selected. d
						Provide Type*	:r*	HMIS Training (PI (1064) HUD V	rogram) Search My Provider Clear g
						Project	Start Date*	10/01/2018	<u>ð</u> 3 2 √:59 √:58 ∨ PM ∨
									Save & Continue Cancel

The Entry/Exit Data popup shows the clients that are associated with the Entry/Exit.

The Household Members on the side can be clicked on to toggle to the other clients and their assessments.

Provider*	HMIS Training ((1064)	Program)	Se	arch My	/ Provide	r Clear	
Type*	HUD 🗸 Update						
Household Members Asso	ciated with this Entry / Ex	cit					
Name	Head of Househol	ld Project Start Date	Date	Interims	Follow Ups	Reason for Leaving	Destir
🍟 🦨 (392923) Fa, Mulan	Yes	/ 10/01/2018	2	E.	E.		
🎉 (392928) Solo, Chewbacc	a, Jr No	/ 10/01/2018	1	E.	E		
🎉 (9) Solo, Han	No	/ 10/01/2018	1	E	E.		
Include Additional Household Members			Showing	1-3 of 3			
Entry Assessment							
Entry Assessment Household Members	HUD CoC & ESG Ent	try All Other Projects (2020)	тср			Entry Date: 10/01/	/2018 12:
Entry Assessment Household Members (392923) Fa, Mulan Age: 34	HUD CoC & ESG Ent	try All Other Projects (2020) ENTS (UDEs)	тср			Entry Date: 10/01/	/2018 12:
Entry Assessment Household Members	HUD CoC & ESG Ent UNIVERSAL DATA ELEMI Date of Birth	try All Other Projects (2020) ENTS (UDEs)	TCP			Entry Date: 10/01/	/2018 12:
Entry Assessment Household Members (392923) Fa, Mulan Age: 34 Veteran: Ves (HUD) (392928) Solo, Chewbacca, Jr Age: 9	HUD CoC & ESG Ent UNIVERSAL DATA ELEMI Date of Birth Date of Birth Type	try All Other Projects (2020) ENTS (UDEs)	TCP	G		Entry Date: 10/01/	/2018 12:
Entry Assessment Household Members (392923) Fa, Mulan Age: 34 Veteran: Ves (HUD) (392928) Solo, Chewbacca, Jr Age: 9 Veteran: No (HUD) (9) Solo, Han	HUD CoC & ESG Ent UNIVERSAL DATA ELEMI Date of Birth Date of Birth Type Gender	try All Other Projects (2020) ENTS (UDEs) //	TCP	~ G		Entry Date: 10/01/	/2018 12:
Entry Assessment Household Members (392923) Fa, Mulan Age: 34 Veteran: Ves (HUD) (392928) Solo, Chewbacca, Jr Age: 9 Veteran: No (HUD) (9) Solo, Han Age: 24	HUD CoC & ESG Ent UNIVERSAL DATA ELEMI Date of Birth Date of Birth Type Gender Primary Race	try All Other Projects (2020) ENTS (UDEs) ////////////////////////////////////	TCP	G	- - - -	Entry Date: 10/01/	/2018 12:
Entry Assessment Household Members (392923) Fa, Mulan Age: 34 Veteran: Ves (HUD) (392928) Solo, Chewbacca, Jr Age: 9 Veteran: No (HUD) (9) Solo, Han Age: 24 Veteran: Ves (HUD)	HUD CoC & ESG Ent UNIVERSAL DATA ELEMI Date of Birth Date of Birth Type Gender Primary Race Secondary Race	try All Other Projects (2020) ENTS (UDEs) -Select- -Select- -Select- -Select-	TCP	G	2 G 7 G	Entry Date: 10/01/	/2018 12:
Entry Assessment Household Members (392923) Fa, Mulan Age: 34 Veteran: Yes (HUD) (392928) Solo, Chewbacca, Jr Age: 9 Veteran: No (HUD) (9) Solo, Han Age: 24 Veteran: Yes (HUD)	HUD CoC & ESG Ent UNIVERSAL DATA ELEMI Date of Birth Date of Birth Type Gender Primary Race Secondary Race Ethnicity	try All Other Projects (2020) ENTS (UDEs) -Select- -Select- -Select- -Select- -Select- -Select- -Select- -Select-	TCP	G	2 G 2 G	Entry Date: 10/01/	/2018 12:
Entry Assessment Household Members (392923) Fa, Mulan Age: 34 Veteran: Yes (HUD) (392928) Solo, Chewbacca, Jr Age: 9 Veteran: No (HUD) (9) Solo, Han Age: 24 Veteran: Yes (HUD)	HUD CoC & ESG End UNIVERSAL DATA ELEMI Date of Birth Date of Birth Type Gender Primary Race Secondary Race Ethnicity Relationship to Head of Household	try All Other Projects (2020) ENTS (UDEs) -Select- -Select- -Select- -Select- -Select- f -Select-	TCP	~ G	2 G	Entry Date: 10/01/	/2018 12:



The Entry Assessment



•The Entry Assessment captures the universal data elements requested by the Federal Partners and DC CoC as well as any program specific data elements required for your agency's funding source.

•Street Outreach, Emergency Shelters, and Safe Havens have a different set of assessments than all other project types. This is due to the way HUD captures Previous Living Situation information.

•Most programs (Non SO, ES, or SH) have the HUD CoC & ESG Entry All Other Projects (2020) TCP assessment. This is the required assessment for all HUD CoC and DHS funded programs.

•Virginia Williams uses the 2018 VWFRC Intake Assessment

Entry Assessment					
Household Members	2018 VWFRC Intake A	ssessment		Entry Date: 10/29/2019 03:12:23 PM 🔒	The Community For The Prev of Homeles
(392923) Fa, Mulan Age: 35 Veteran: Yes (HUD) (392928) Solo, Chewbacca, Jr Age: 10 Veteran: No (HUD) (9) Solo, Han Age: 25 Veteran: Yes (HUD)	Date of Birth Date of Birth Type Gender Primary Race Secondary Race Ethnicity Relationship to Head of Household Veteran Informati	11 / 03 / 1983 20 20 6 Full DOB Reported (HUD) Female Asian (HUD) -Select- Non-Hispanic/Non-Latino (HUD) ✓ G -Select- Select- On	G G G	G G	
	Year entered military service	* Year separated from military service	Branch of the Military	Discharge Status	
	Are You Receiving Case Management from Any Other Agency? Housing Status (Retired) In What Ward Did the Client's Homelessness Originate?	-Select- ↓ G -Select- ↓ G		G	
	Client Location Prior Living Situation Length of Stay in Previous Place Does the client have a disabling condition?	-Select- -Select- -Select- -Select- G	~ G	~	G

Add

Veteran Information

Year entered military service*



 Anyone for whom you answer 'yes' to the question <u>U.S. Military Veteran</u>, you must also complete the Veteran Information sub-assessment.

service

Year separated from military

• Make sure to confirm or deny each of the different war eras.

Branch of the	Military	Discharge	Status		of Hom
	Add Recordset	- (9) Solo	o, <mark>Han</mark>	 Kranch at the Militar 	
	Veteran II	nformatio	n		
tha	Year entered service	military *	10 / 27 / 2019	<u>週</u> 🕽 🥂 G	
ust	Year separate military service	d from e		20 🔿 20 G	
า	World War II		-Select-	✓ G	
	Korean War		-Select-	∽ G	
the	Vietnam War		-Select-	~ G	
	Persian Gulf V	/ar	-Select-	∽ G	
	Afghanistan		-Select-	✓ G	
	Iraq Freedom		-Select-	~ G	
	Iraq Dawn		-Select-	∽ G	
	Conter Peace-l Operations or Interventions	eeping Military	-Select-	~ G	
	t Branch of the	Military	-Select-	✓ G	
	, Discharge Sta	tus	-Select-		~ G
	i		Save	Save and Add Another	Cancel

Income from Any Source -Select- C Q Monthly Income Monthly Start Date * Receiving Income Source? Source of Income Monthly Amount Start Date *	HUD Verification				The Community Par For The Preven of Homelessne
Add View Gross Income Total Monthly Income G	HUD Verification: Monthly Income for 10/28/20 Per Source of Income, the current records for Monthly I i records for Monthly Income not overlapping as of this date Source of Income as of 10/28/2019, records containing "Y put Select the Receiving Income Source? value for all incomplete Source of Income records	19 ncome as of 10/ are not displaye es" values will b poses. ollected	28/2019 are di ed. In the even e displayed and	splayed below. A t that multiple re d take precedence	ny previous cords exist per e for reporting
 Begin by setting all incomplete values to 			Receiving 1	income Source?	
"No"	Source of Income	Yes	No	Data Not Collected	Incomplete
 For each source of income. add the 	Alimony or Other Spousal Support (HUD)	0	0	0	۲
	Child Support (HUD)	0	0	0	۲
income source, receiving income source	Earned Income (HUD)		0	0	۲
= Yes, monthly amount and start date.	General Assistance (HUD)	0	0	0	۲
	Other (HUD)	0	0	0	۲
 Once all income sources have been 	Pension or retirement income from another job (HUD)	0	0	0	۲
recorded via the HUD Verification, click	Private Disability Insurance (HUD)	0	0	0	۲
	Retirement Income From Social Security (HUD)	0	0	0	۲
"Save & Exit"	SSDI (HUD)	0	0	0	۲
	SSI (HUD)	0	0	0	۲
	TANF (HUD)	0	0	0	۲
	Unemployment Insurance (HUD)	0	0	0	۲
	VA Non-Service Connected Disability Pension (HUD)	0	0	0	۲
	VA Service Connected Disability Compensation (HUD)	0	0	0	۲
	Worker's Compensation (HUD)	0	0	0	۲
			Save	Save & Exit	Exit

Receiving



Begin by setting all incomplete values to "No"

- For each source of Non-Cash Benefits, add the Non-Cash Benefit source, receiving benefit = "Yes", and start date
- Once all Non-Cash sources have been recorded via the HUD Verification, click "Save & Exit"

HUD Verification: Non-Cash Benefits for 10/28/2019

Per Source of Non-Cash Benefit, the current records for Non-Cash Benefits as of 10/28/2019 are displayed below. Any previous records for Non-Cash Benefits not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Non-Cash Benefit as of 10/28/2019, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Benefit? value for all incomplete Source of Non-Cash Benefit records

	Receiving Benefit?							
Source of Non-Cash Benefit	Yes	No	Data Not Collected	Incomplete				
Supplemental Nutrition Assistance Program (Food Stamps) (HUD)		0	•	۲				
Special Supplemental Nutrition Program for WIC (HUD)	0	0	0	۲				
TANF Child Care Services (HUD)	0	0	0	۲				
TANF Transportation Services (HUD)	0	0	0	۲				
Other TANF-Funded Services (HUD)	0	0	0	۲				
Other Source (HUD)	0	0	0	۲				
		Save	Save & Exit	Exit				

Covered by Health Insurance -Select-	▼ G						
🔍 Health Insurance	HUD Verifi	cation 🔺					
Start Date * Health Insurance Type Add	Covered? End Date			т	he Community Partnershi For The Prevention of Homelessness		
	HUD Verification: Health Insurance for 10/28/201	.9					
 Begin by setting all incomplete values to "No" For each type of Health Insurance 	 Per Health Insurance Type, the current records for Health Insurance records for Health Insurance not overlapping as of this date per Health Insurance Type as of 10/28/2019, records contain reporting Select the Covered? value for all incomplete Health Insurance Type records <u>No</u> <u>Data Not Coll</u> <u>Incomplete</u> 	surance as of 10 are not display ning "Yes" value ourposes. ected	0/28/2019 are red. In the events will be disp	e displayed below. ent that multiple r layed and take pr	Any previous records exist ecedence for		
• For each type of Health Insurance,			Covered?				
add the Health Insurance type,	Health Insurance Type	Yes	No	Data Not Collected	Incomplete		
covereur = res	MEDICAID	0	0	0	۲		
 Once all Health Insurance sources 	MEDICARE	0	0	0	۲		
have been recorded via the HUD	State Children's Health Insurance Program	0	0	0	۲		
Verification, click "Save & Exit"	Veteran's Administration (VA) Medical Services	0	0	0	۲		
	Employer - Provided Health Insurance	•	0	0	۲		
	Health Insurance obtained through COBRA	0	0	0	۲		
	Private Pay Health Insurance	•	0	0	۲		
	State Health Insurance for Adults	0	0	0	۲		
	Indian Health Services Program	0	0	0	۲		
	Other	0	0	0	۲		
			Save	Save & Exit	Exit		

Q Disabilities				HUD Ver	ification 🛕			
visability Type	Disability Determination	Above condition is going to be long term? (Retired)	Start Date *					The Community For The Prev
Add								of Homeles
		HUD Verification: Disabilitie	es for 10/28	3/2019		10/20/	2017	
 Begin by settin incomplete val For each Disab 	ng all lues to "No" pility, add the	Disabilities not overlapping as as of 10/28/2019, records Select the Disability Deterr value for all incomplete Dis Type records	apping as of this date are not displayed. In the event that multiple records exist per Disability), records containing "Yes" values will be displayed and take precedence for reporting purposes ity Determination nplete Disability O <u>Client doesn't know (HUD)</u> O <u>Client refused (HUD)</u> O <u>Data not collected (HUD)</u> Incomplete					Disability Type purposes.
disability type,	, determination,				Disability De	termination		
duration, and s Once all Disab 	start date. ilities have	Disability Type	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete
been recorded	via the HUD	Alcohol Abuse (HUD)	0	0	0	0	0	۲
Verification, cl	ick "Save &	Both Alcohol and Drug Abuse (HUD)	0	0	0	0	0	۲
Exit"		Chronic Health Condition (HUD)	0	0	0	0	0	۲
		Developmental (HUD)	0	0	0	0	0	۲
		Drug Abuse (HUD)	0	0	0	0	0	۲
		HIV/AIDS (HUD)	0	0	0	0	0	۲
		Mental Health Problem (HUD)	0	0	0	0	0	۲
		Physical (HUD)	0	0	0	0	0	۲

Oisabilities Disability Type	ability Determination	Above co going to term? (R	ondition is be long tetired)	Start Date *	HUD Verifi	ication 🔔				The Community Partne For The Preventior of Homelessness						
Add																
		HUD Verification: A	Add Recor	dset				×								
		Per Disability Ty	Disab	ilities) it	reviou t per D	s records for isability Type						
		as of 10/28/	Disability	Туре	Alcohol Abu	use (HUD)		i c	orting purposes.							
			Disability	Determination	Yes (HUD)											
 For each Disability, add the type determination duration 	e disability	Select the Di value for all i Type records	If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently		-Select- 🔻 G											
start date.				a hoon				Disability Type	Above co to be lon (Retired)	Above condition is going to be long term? G (Retired)] G			not ted	Incomplete
recorded via the UUD Veri	fication	Alcohol Abuse (HU	Start Date*		10 / 28 / 2019 🔊 🖏 😋		🕽 🥂 G	Þ	-	0						
click "Save & Exit"	incation,	Both Alcohol and D (HUD)					C) 🖉 c		>	۲						
		Chronic Health Cor				Save	Ca	ncel		۲						
		Developmental (HUU)	0	0	0	0			۲						
		Drug Abuse (HUD)		0	0	0	0	0		۲						
		HIV/AIDS (HUD)		0	0	0	0	0		۲						
		Mental Health Proble	m (HUD)	0	0	0	0	0		۲						
		Physical (HUD)		0	0	0	0	0		۲						
							Save	Save &	Exit	Exit						
		AUG					יטווכ		1							



Domestic Violence Questions

- Domestic Violence Questions should be completed for Heads of Households and Adults.
 - Verification is not necessary unless required by your funder.

Do you have a history of domestic violence?	-Select- 🗸 G	
If yes, when experience occurred	-Select-	~ <mark>G</mark>
If yes, are you currently fleeing?	-Select- 🗸 G	

Work History

Q Work History						
Employer's Name	Employer's Phone Number	Employment Status	If Ended, Re	eason		
Add				Add Records	et - (392923) Fa, Mulan	×
(Work Hi	story	
				Start Date	* 10 / 29 / 2019 🔊 🖏 G	
				End Date	/ / 🥂 🧖 🖏 G	
				Employer's	Name	G

The Work History Sub-assessment should be completed for the Head of Household if they have been employed and/or are currently employed.

dd Recordset - (39292	3) Fa, Mulan 🛛 🔣
Work History	
Start Date*	10 / 29 / 2019 🔊 💐 G
End Date	// /
Employer's Name	G
Supervisor's Name	G
Employer's Address	G
Employer's City	-Select- V G
Employer's State	-Select- V G
Employer's ZIP	G
Employer's Phone Number	G
Employer's FAX	G
Employment Status	-Select- V G
Hours of Work Per Week	G
Type of Work	-Select- V G
Hourly Wage	G
Receiving Health Insurance This Employer?	-Select- 🗸 G
If Ended, Reason	-Select- V G
	Save Save and Add Another Cancel

10/1/2020

The Community Partnership For The Prevention of Homelessness



VW Resources

🔍 VW Resources			
Resources	Start Date*	End Date	Resource Amount
Add			

VW Resources	
Resources	-Select- 🗸 G
Start Date*	10 / 29 / 2019 🛛 🧭 😋 🥰 G
End Date	// 🧖 🏹 🦉 G
Resource Amount	G

- Add the resources that Virginia Williams has provided the household.
- Resource options include
 - Clothing
 - Diapers
 - Food Vouchers
 - Identification Cards
 - Long Distance Transportation
 - Personal/Grooming Needs
 - Transportation Passes

0	11	/2020
.0/	' ±/	2020



Potential Housing Accommodations

Where Will You and Your Children Sleep Tonight if There is No Placement Today?		G		
If the Client Has A Place to G	Go			
How Long Can You Stay at the Place You Will Sleep Tonight?		G		
If the Client Has No Place to	Go			
Do You Have Any Names and	Telephone Numbers of			
People Who Can Assist You Te	emporarily With This			
Emergency?				
🔍 Housing Contact Info	ormation			
Name	Phone Number	Response		
Add		Add Recordset - (3929	23) Fa, Mulan	×
Add		Add Recordset - (3929 Housing Contact 1	23) Fa, Mulan Information	×
Add		Add Recordset - (3929 Housing Contact 1 Name	23) Fa, Mulan Information	G
Add		Add Recordset - (3929 Housing Contact I Name Phone Number	23) Fa, Mulan Information	C C
Add		Add Recordset - (3929 Housing Contact 1 Name Phone Number Response	23) Fa, Mulan Information	G G G
Add		Add Recordset - (3929 Housing Contact I Name Phone Number Response Start Date	23) Fa, Mulan Information Info	G G G G
Add		Add Recordset - (3929 Housing Contact I Name Phone Number Response Start Date End Date	23) Fa, Mulan Information	C C C C C C C C C C C C C C C C C C C



2018 VW Intake Assessment Cont'd

Reasonable Accommodation	-Select- V G	
Reasonable Accomodation Outcome	-Select- V G	
If Reasonable Accomodation Case Closed, Other Reason Above, Describe Here	G	
Priority	-Select- V G	
Has the Client Received (Applied For) Services Before?	-Select- 🗸 G	
Highest Level of Education Attained	-Select- V G	
Presently Attending School?	-Select- V G	
If No, Reason Not Attending School		.:
If Yes, School Name	G	
If No, Date Last Enrolled in School	// 🧖 🌍 🦣 G	

G



Updating Sub-assessments

- •If information in a sub-assessment has changed, we need to end the old information, and create new, accurate information.
- •We do not want to Delete any information that used to be correct.
- •We will add an End Date to the information that is no longer true, and then Add a new line in the sub-assessment with the new information.

Show All Non-Cash Benefits Records

🤹 🛛



Here we have the details of the Non-Cash Benefits sub-assessment.

In my update, I find out that the client now has Food Stamps. I will want to update this information in HMIS.

	Non-Cash Benefits						
		Provider	Date Effective	Source of Non- Cash Benefit	Receiving Benefit?	Start Date	End Date
/	1	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Temporary rental assistance (HUD)	No	05/16/2017	
2	đ	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other Source (HUD)	No	05/16/2017	
/	1	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other TANF- Funded Services (HUD)	No	05/16/2017	
/	Ţ	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Section 8, Public Housing, or other ongoing rental assistance (HUD)	No	05/16/2017	
/	1	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017	
/	1	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Child Care Services (HUD)	No	05/16/2017	
	0	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Special Supplemental Nutrition Program for WIC (HUD)	No	05/16/2017	
/	đ	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	No	05/16/2017	
	Add	1		Showin	ng 1-8 of 8		
							Exit

Here we have the details of the Non-Cash Benefits sub-assessment.

In my update, I find out that the client now has Food Stamps. I will want to update this information in HMIS.

This information is no longer true. I will add an End Date to this record for yesterday. Show All Non-Cash Benefits Records

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The	Community Partnership For The Prevention of Homelessness

	Non-Cash Benefits						
		Provider	Date Effective	Source of Non- Cash Benefit	Receiving Benefit?	Start Date	End Date
/	ij	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Temporary rental assistance (HUD)	No	05/16/2017	
/	1	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other Source (HUD)	No	05/16/2017	
/	0	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other TANF- Funded Services (HUD)	No	05/16/2017	
/	Ţ	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Section 8, Public Housing, or other ongoing rental assistance (HUD)	No	05/16/2017	
/	Ì	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017	
/	0	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Child Care Services (HUD)	No	05/16/2017	
	Ì	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Special Supplemental Nutrition Program for WIC (HUD)	No	05/16/2017	
2	đ	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	No	05/16/2017	
	Add	1		Showin	ng 1-8 of 8		
							Exit

Here we have the details of the Non-Cash Benefits sub-assessment.

In my update, I find out that the client now has Food Stamps. I will want to update this information in HMIS.

This information is no longer true. I will add an End Date to this record for yesterday.

Once the End Date has been added, I will need to Add a new record for Food Stamps.

Show All | Edit Recordset - (9) Solo, Han 8 4 峰 🔬 Non-Cash Benefits Non-The Community Partnership For The Prevention Pr Source of Non-Cash Supplemental Nutrition Assistance Program (Food Stamps) (HUD) 🗸 G Benefit No **Receiving Benefit?** ~ G Ho Inf If Other, Please Specify (H G Dis Amount of Non-Cash Benefit 0 Inf 27, 🔿 27, G 05 / 16 / 2017 Start Date* (HI 10 / 27 / 2019 27, 🙄 27, G End Date Print Recordset Save Cancel TANF 05/16/2017 Homeless Management Transportation No 05/16/2017 Information System 3:19:54 PM Services (HUD) (HMIS) (2) District of Columbia Homeless Management TANF Child Care 05/16/2017 No 05/16/2017 Information System 3:19:54 PM Services (HUD) (HMIS) (2) District of Columbia Special Homeless Management 05/16/2017 Supplemental 05/16/2017 No Information System Nutrition Program 3:19:54 PM for WIC (HUD) (HMIS) (2) Supplemental District of Columbia Nutrition Homeless Management 05/16/2017 10/27/2019 Assistance No 05/16/2017 Information System 3:19:54 PM Program (Food (HMIS) (2) Stamps) (HUD) Add Showing 1-8 of 8 Exit

of Homelessness

Here we have the details of the Non-Cash Benefits sub-assessment.

In my update, I find out that the client now has Food Stamps. I will want to update this information in HMIS.

This information is no longer true. I will add an End Date to this record for yesterday.

Once the End Date has been added, I will need to Add a new record for Food Stamps.

Since the client is receiving food stamps now, I answer "Receiving Benefit" = "Yes.

The Start Date = today's date.

Non-	(Non-Cash B	enefits					
Pro	Source of Non-C Benefit	ash Suppl	emental Nutrition Assis	tance Progr	ram (Food Stamps) (HUD)) v G Pate	
Dis 🖉 🧫 Hoi	Receiving Benefi	t? Yes	~ G				
Inf (H)	If Other, Please S	Specify					
Dis Thore Thore Unf				G		- 11	
Dis Dis	Amount of Non-O Benefit	Cash		G			
Inf	Start Date*	10 /	28 / 2019 🛛 🔊 🦧	G			
Dis Boilt	End Date	/	/ 🧖 💐 🤻	G			
Minfo (HN	c v				Save Canc	el	
Dis Hoi Infi (HN	trict of Columbia meless Management ormation System MIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017		
Dis Hor Inf (HN	trict of Columbia meless Management ormation System MIS) (2)	05/16/2017 3:19:54 PM	TANF Child Care Services (HUD)	No	05/16/2017		
Dis Hor Inf (HN	trict of Columbia meless Management ormation System MIS) (2)	05/16/2017 3:19:54 PM	Special Supplemental Nutrition Program for WIC (HUD)	No	05/16/2017		
Dis Hor Infr (HM	trict of Columbia meless Management ormation System MIS) (2)	05/16/2017 3:19:54 PM	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	No	05/16/2017	10/27/2019	9
Add			Show	ing 1-8 of	8		



The Community Partnership For The Prevention of Homelessness



Exiting a Household

• When the household exits your program, you will need to create an exit for all household members.



Client - (39	2923) Fa, Mula	n						Mass Visi	oility Update 🏻 🔏
(392923) Fa, Mu Release of Info	lan mation: <mark>None</mark>						-Switch to Anothe	r Household Membe	er- 🗸 Submit
Client Information	on				Service	Transactions			
Summary	Client Profile	Households	ROI	Entry	/ Exit	Case Managers	Case Plans	Measurements	Assessments
Entry / E	() xit	Reminder: Househo	old members m	oust be establ	ished on Ho	ouseholds tab befor	e creating Entry /	Exits	
Program				Туре		Project Start Date	Exit Date	Interims F	ollow Client Ups Count
蘭 HMIS Traini	ng (Program) <mark>(</mark> 1064	•)		HUD	/	10/01/2018	2	lo	E. 🔏 🎉
Add Entry /	Exit				Sł	nowing 1-1 of 1			
									Exit





Exiting a Household

Make sure the correct clients are selected.

Set the exit date to the date the client left your program and the time to the standard 12:01:00 A.M.

Set the exit Destination. The destinations with "(VW)" next to them are specific to Virginia Williams.

Edit Exit Data - (392	2923) Fa, Mulan	×
Household Mem	bers	
🚺 Τα	update Household members for this Exit Data, click the box beside each name.	
🗌 (54915) Two Pa	rent Family	
✓ (392923) Fa, Mu	lan	
(392928) Solo,	Chewbacca, Jr	
(9) Solo, Han (E	ixit Date: 10/30/2019 1:42 PM)	
<u> </u>		
Edit Exit Data - (392923) Fa, Mulan	
Exit Date*	[10]/29/2019 Ø 2 ↓:22 ↓:24 ∨ PM ∨	
Reason for Leaving	Select-	
If "Other", Specify		
Destination*	-Select-	~
If "Other", Specify		
Notes		
		:
		Consel
	Save & Continue	Cancel



- On the Entry/Exit Data pop-up you will now see that all clients are exited.
- The Exit Assessment is similar to the Update and Annual Assessment in that you can update the same fields if anything changes the day the client leaves your program
- Depending on your program's funding source, you may have additional questions that only appear at Exit.
- Be careful to read the assessment carefully to ensure you are answering all questions.

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client. HMIS Training (Program) Provider* Search My Provider Clear (1064)Type* HUD \sim Update Household Members Associated with this Entry / Exit Exit Date Interims Follow Reason for Head of Project Start Destination Notes Name Ups Leaving Household Date Permanent housing (other than RRH) (392923) Fa, Mulan Yes 10/01/2018 11/03/2019 0 E. for formerly homeless persons (HUD) Permanent housing (other than RRH) (392928) Solo, 0 E. No 10/01/2018 11/03/2019 Chewbacca, Jr for formerly homeless persons (HUD) Rental by client, no ongoing housing 0 F. 10/01/2018 10/30/2019 (9) Solo, Han No subsidy (HUD) Include Additional Household Showing 1-3 of 3 Members Exit Assessment Entry Assessment Household Members HUD CoC & ESG Exit (2020) TCP Exit Date: 11/03/2019 02:22:24 PM 🔒 (392923) Fa, Mulan CoC-SPECIFIC DATA ELEMENTS Age: 36 Veteran: Yes (HUD) Are you engaged -Select- 🗸 G (392928) Solo, Chewbacca, Jr with case management? Age: 10 Veteran: No (HUD) Client Contact Information - Adults Only (9) Solo, Han Client Email Address Age: 25 (Optional But Veteran: Yes (HUD) Encouraged)



EDA and Data Sharing



• Enter Data As allows for more pinpointed data sharing to happen.

- This mirrors clients wishes and intentions when they sign Releases of Information.
- Keeps client information safe and secure.

Common EDA Questions



• Do I really need to do this every time I log in?

• Do I need to actually change my provider I am EDA'd to when I start data entry into another program?

• What happens if I forget?



Data Security



Data Security

• Keeping client information safe and secure begins with <u>YOU!</u>

- •Do not let others log in as you.
 - Keep your user name and password to yourself.
 - Do not keep it posted anywhere others can see
- •Do not leave your computer unattended while logged into ServicePoint.
- •Do not save your login information with your web browser.
- •Do not send client identifying information via unencrypted emails (including to the helpdesk!)
 - Client Identifying information includes:
 - Name
 - Date of Birth
 - Social Security Number

Additional Resources



•Helpdesk: hmis@community-partnership.org

- Email the helpdesk with questions and we will provide answers and resources.
- We respond within 2 business days.
- •Trainings:
 - We hold HMIS trainings every month.
 - They are open to all, new user, seasoned veteran, or anywhere in between
 - Training eventbrites are found at http://communitypartnership.org/providers/training
 - Have questions about the trainings? Email the helpdesk!





Thanks for participating!

Questions?

HMIS Help-Desk Email: <u>hmis@community-partnership.org</u>

10/1/2020

HTTP://WWW.COMMUNITY-PARTNERSHIP.ORG/