

# Santa Barbara County Continuum of Care

September 2018

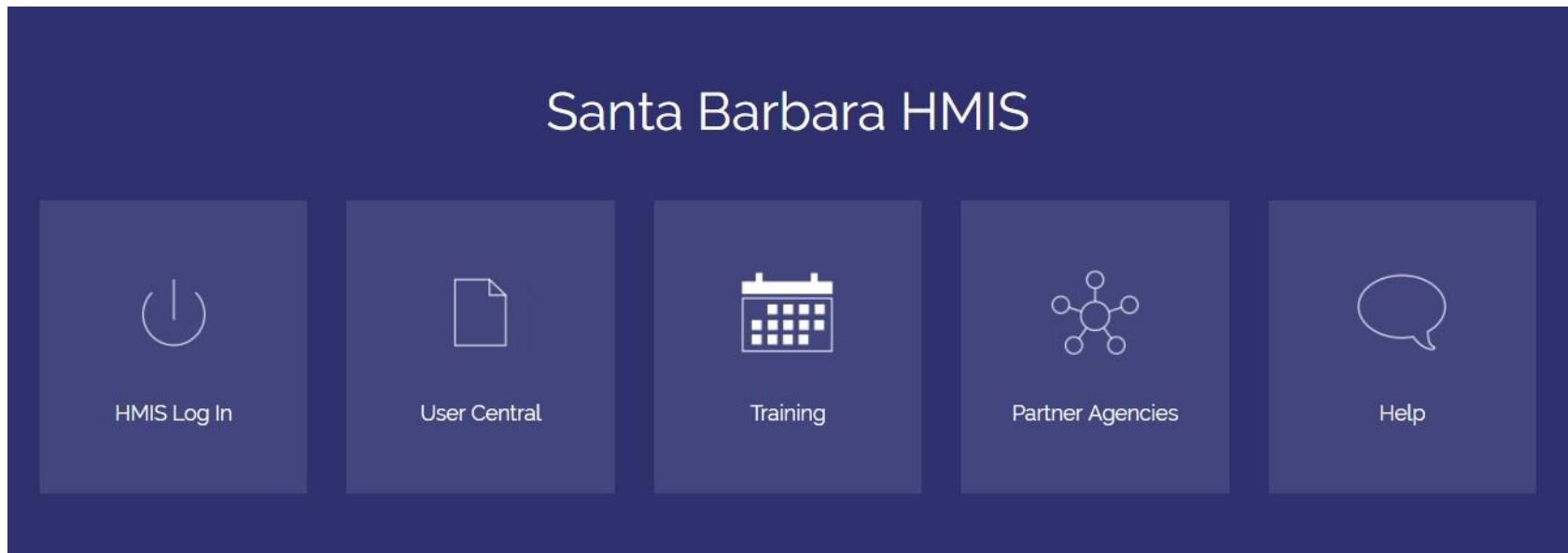
## HMIS 5.12 workflow Adding New Clients



Community Technology Alliance  
1080 Minnesota Ave, Suite 1 San José, CA 95125  
Phone 408.437.8800 • Fax 408.437.916

# Access HMIS Web Portal

Access the Santa Barbara portal at: <http://ctagroup.org/santa-barbara-hmis/>



## The Five (5) Icons:

- **Login to HMIS**
- **User Central: documents and forms**
- **Training: sign up for a training or access online video library**
- **Partner Agencies: List of Agencies that use HMIS**
- **Help: click to send a Help Request**

# Access Home Page Dashboard

Access HMIS by entering your username and password. Your Home Page Dashboard appears

The screenshot shows the Home Page Dashboard with the following components:

- Navigation Menu (Left):** Includes Home, ClientPoint (highlighted with a red arrow), CallPoint, ResourcePoint, ShelterPoint, ActivityPoint, SkanPoint, Reports, Admin, and Logout.
- System News (1):** A table with columns Date and Headline. One entry: 10/01/2014 | 2014 HUD Data Standards have arrived!
- Agency News (0):** Empty.
- Counts Report (Highlighted with an orange arrow):**
  - My Clients With An Entry But No Exit: 0
  - My Clients With NULL UDEs: 0
  - My Clients With Expiring ROIs: 0
  - My Clients With Recent Exits: 0
- Follow Up List (1):** A table with columns Client ID, Type, Date, and Time Remaining. One entry: 61245 | Goal | 12/31/2012 | Past.

## Menu Bar (left side of screen)

Click to access **Client Point** (red arrow) or other available option. Example: click **SkanPoint** to enter client data using bar-coded client ID cards.

**Note:** modules displayed in this screenshot may not display on your home page. Available modules depend on your access level and the modules your agency has selected to use.

## Counts Report (orange arrow)

A Counts Report provides a quick and easy way to keep tabs on your clients. If a number appears on a report: click on that number to see your clients.

The Counts Report section usually comes with these 4 reports:

- **My Clients with an Entry but no Exit:** details how many clients are currently enrolled in your program.
- **My Clients with Null UDEs:** details clients with one or more missing UDEs (universal data elements)
- **My Clients with Expiring ROIs:** details clients whose ROI (release of information) expires within a month
- **My Clients with Recent Exits:** details clients who have exited your program within the past month

Other Counts reports are available. Check with your Agency Administrator for details.

# Client Point: Client Search page

Click **Client Point** to access the Client Search page.


## Client already in HMIS?

Search for client, by:

- Name **OR**
- SSN **OR**
- Client ID #
- Click **Exact Match**
- Click **Search**

## If there is a match:

Client's name will appear at bottom of screen




Client Results		
	ID	Name ▲
	265957	Client, Test

No match?  
Client not in HMIS?  
See next page for details on  
how to add a new client

### 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.

	First	Middle	Last	Suffix	
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Name Data Quality	-Select-				Date of Birth
Alias	<input type="text"/>				<input type="text"/> / <input type="text"/> / <input type="text"/>   
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>				DOB Data Quality
Social Security Number Data Quality	-Select-				Gender
U.S. Military Veteran?	-Select-				Primary Race
Exact Match	<input type="checkbox"/>				Secondary Race
Search ACTIVE Clients	<input checked="" type="radio"/>				Ethnicity
Search INACTIVE / DELETED Clients	<input type="radio"/>				-Select-
Search ALL Clients	<input type="radio"/>				-Select-

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### Client Number

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

Client ID #

**Did you find a match?** Skip to page 11 Release of Information.

# Adding a New Client

Enter as much client information as possible. In this screenshot, the following client information was collected:

**Name**  
**Name Data Quality**  
**Social Security Number**  
**Social Security Data Quality**  
**US Military Veteran?**

**Date of Birth**  
**DOB Data Quality**  
**Gender**  
**Primary Race**  
**Ethnicity**


**Note**  
**Client doesn't know?**  
 Select 'Client doesn't know'  
**Client refuses to answer?**  
 Select 'Client refused'

### 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.

	First	Middle	Last	Suffix	
<b>Name</b>	<input type="text" value="New"/>	<input type="text"/>	<input type="text" value="Client"/>	<input type="text"/>	
<i>Name Data Quality</i>	<input type="text" value="Full Name Reported"/>				<b>Date of Birth</b>
<b>Alias</b>	<input type="text"/>				<input type="text" value="06 / 06 / 1967"/>
<b>Social Security Number</b>	<input type="text" value="123"/>	<input type="text" value="- 45"/>	<input type="text" value="- 6789"/>		<i>DOB Data Quality</i>
<i>Social Security Number Data Quality</i>	<input type="text" value="Full SSN Reported (HUD)"/>				<input type="text" value="Full DOB Reported (HUD)"/>
<i>U.S. Military Veteran?</i>	<input type="text" value="Yes (HUD)"/>				<b>Gender</b>
<b>Exact Match</b>	<input checked="" type="checkbox"/>				<input type="text" value="Male"/>
<b>Search ACTIVE Clients</b>	<input checked="" type="radio"/>				<i>Primary Race</i>
<b>Search INACTIVE / DELETED Clients</b>	<input type="radio"/>				<input type="text" value="White (HUD)"/>
<b>Search ALL Clients</b>	<input type="radio"/>				<i>Secondary Race</i>
					<input type="text" value="-Select-"/>
					<i>Ethnicity</i>
					<input type="text" value="Hispanic/Latino (HUD)"/>



## Ready to add new client?

- Click **Add New Client With This Information** (black arrow)
- [Pop up window appears. Select Add Client Only](#)
- Page refreshes to client's Summary page

## Add New Client With This Information greyed out? (not able to add client)

- You did not search for this client before trying to enter as a new client
- Click **Search** to see if client is in HMIS
- Client not in HMIS? **Add New Client With This Information** should no longer be greyed out

# New Client: Summary page (top of page)

Client Information displays on the top half of the Summary page:

- Client's HMIS number and Name (blue arrow)
- Menu bar (black arrow):
  - Click on a tab to access that tab's function
  - Example: click **Client Profile** to update the client's record and demographic data fields

How to add client's photo

- **Photo icon** (orange arrow)
  - To add photo: click on **Client Profile** tab
  - Click Change (under the Photo icon)
  - Click **Browse**. Select photo. Click **Upload**
- **Client Record** (green arrow)
  - Details the date and time client was added to HMIS
  - Details Client Record data (examples: Name, Date of Birth)

Client - (267376) Client, New

(267376) Client, New  
Release of Information: None

Client Information | Service Transactions

Summary | Client Profile | Households | ROT | Entry / Exit | Case Managers | Case Plans | Measurements | Activities | Assessments

Added to the system 10/04/2014 03:33 PM

Name	Client, New	Gender	Male
Date of Birth	06/06/1967 (Age 47)	Primary Race	White (HUD)
Social Security	123-45-6789	Secondary Race	
		U.S. Military Veteran?	Yes (HUD)

# New Client: Summary page (bottom of page)

The boxes are in order of how best to enter new client data. A typical configuration includes the following:

**Households**

ID	Type	Head of Household	Relationship
Search Existing Households		Start New Household	

**Case Managers**

Name	Provider	Phone Number
Add Case Manager		
No matches.		

**Measurements**

Type	Latest Point	Total	Date
Add New Measurement			
No matches.			

**Release of Information**

Provider	Permission	Start Date	End Date
Add ROI			
No matches.			

**Entry/Exits**

Program	Type	Entry Date	Exit Date
Add Entry / Exit			
No matches.			

**Services**

Start Date	End Date	Provider
Add Service		Add Multiple Services
No matches.		

**VI SPDATs and Additional Required Questions**

Interviewer's name	<input type="text"/>	G
Survey location	<input type="text"/>	G
On a regular day, where is it easiest to find you and what time of day is easiest to do so?	<input type="text"/>	G
Is there a phone number and/or email where someone can safely get in touch with you or leave you a message?	<input type="text"/>	G
How many months has the client or client's family been homeless?	<input type="text"/>	G
For the VI-FSPDAT, how many people in the client's family need to be housed?	<input type="text"/>	G

**VI-SPDAT v2.0**

Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL
Add						

**VI-FSPDAT v2.0**

Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	E. FAMILY UNIT	GRAND TOTAL
Add							

- **Households:** create a new household or update an existing household
- **Release of Information:** add an ROI for client or for the entire household
- **Case Manager:** assign yourself or another person as the case manager. Adding a case manager
- **Entry/Exits:** add a project entry or project exit for a client or for the household. Access a project entry to add an Interim, Update or Annual Assessment
- **Services:** add a service transaction for a client or for a household
- **Restricted ROI:** enter client restrictions here, then contact CTA and give detail of the restrictions, before entering in any information into the system
- **VI-SPDAT v2.0:** updated VI-SPDAT Assessment tool
- **VI- F SPDAT v2.0:** Family Assessment tool

\*NOTE- The boxes you can see and their order varies on agency preference, if you want to modify them please have your agency admin submit a case



# Creating the Household

**Client single?** Skip this page. Go to page 11: Release of Information.

**Client in a Household?** Best practice is to add each family member into HMIS by following the steps outlined on pages 9 & 10.

Write down the HMIS # for each family member added. Go the Head of Household's Summary page.

ID	Type	Head of Household	Relationship
Search Existing Households		Start New Household	

Click **Start New Household** (blue arrow)

New page appears. At the top of the page is **Household Type**.

## Add New Household

### Household Type

Household Type \*

Select best match (black arrow).

Then scroll down to bottom of page to **Client Number** section.

### Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID #

### Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
267376	Client, New	123-45-6789	06/06/1967		Male		0

Add the HMIS number of the client to add to the Household. In this example HMIS # 267449 was entered (red arrow).

Click **Submit**. Client will appear in **Selected Clients** (green arrow)

**Need to add more members?** Enter HMIS # in Client ID #, then click Submit (red arrow)

**Finished adding members?** Click **Continue**.

# Creating the Household

**Household Information - (55790) Two Parent Family**

(55790) Two Parent Family Save Save & Exit Exit

Household Type \* Two Parent Family

Income US\$0.00 monthly (US\$0.00 annual)

Client Count 3

**Household Members**

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(267376) Client, New	47	Yes	Self	10 / 07 / 2014	0	1
(267450) Client, Nouveau	15	No	Step-daughter	10 / 07 / 2014	0	1
(267449) Client, Nuevo	45	No	Wife	10 / 07 / 2014	0	1

Add/Delete Household Members Household History Report

Clicking Continue takes you to the **Household Information** page

Members appear in the **Household Members** section (blue arrow).

Select Head of Household. Then select the relationship to head of household for each family member.

In this example:  
 26736 is the Head of Household  
 267450 is the Step-daughter  
 267449 is the Wife

Once relationships have been correctly defined: click **Save & Exit**

**Review Household Data**

It is strongly recommended to review the fields for Head of Household, Relationship to Head of Household, and Household Type for all Clients to ensure the information is correct.

Would you like to review this data now?

Yes No

Pop-up window appears. Click No.

How to add client data will be covered later in this manual.

Clicking No returns takes you to the Summary page of the Head of Household. Household information appears in the **Households** box.

**Households**

ID	Type	Head of Household	Relationship
55790	Two Parent Family		
	*Client, New	Yes	Self
	Client, Nouveau	No	Step-daughter
	Client, Nuevo	No	Wife

Search Existing Households Start New Household

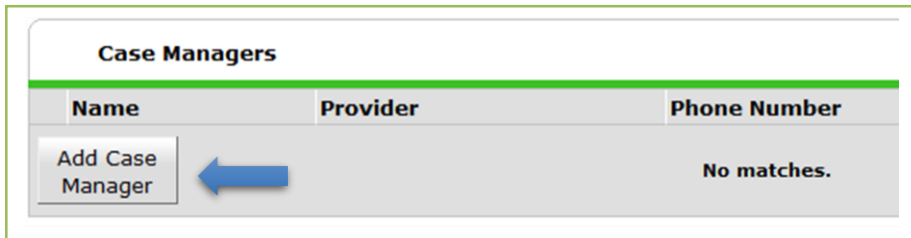
# Open HMIS Release of Information

**Please enter a client's ROI into HMIS in accordance with the separate "Adding an ROI" workflow document, available on the [HMIS portal](#).**

# Case Managers

Assigning yourself (or other person in your agency) as the case manager activates the Counts Reports function.

A client may have several case managers at multiple agencies. Knowing who a client's case managers are allows for collaboration in providing services to the client.



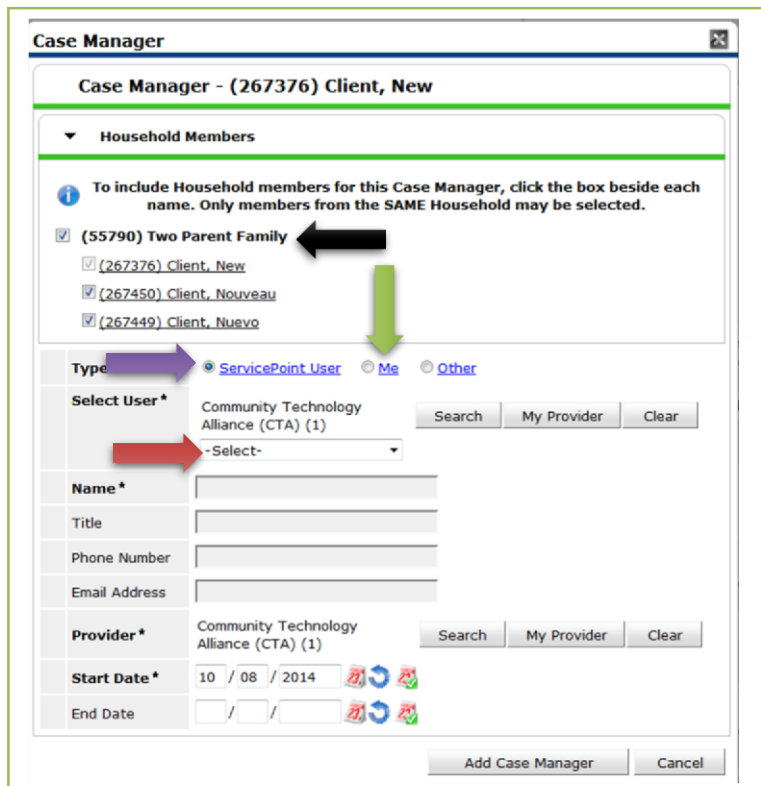
**Case Managers**

Name	Provider	Phone Number
No matches.		

Add Case Manager

Click **Add Case Manager** (blue arrow)

Case Manager page appears.



**Case Manager**

Case Manager - (267376) Client, New

Household Members

To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.

(55790) Two Parent Family

- (267376) Client, New
- (267450) Client, Nouveau
- (267449) Client, Nuevo

Type:  ServicePoint User  Me  Other

Select User \* Community Technology Alliance (CTA) (1) Search My Provider Clear

Name \* Title Phone Number Email Address

Provider \* Community Technology Alliance (CTA) (1) Search My Provider Clear

Start Date \* 10 / 08 / 2014 End Date \*

Add Case Manager Cancel

## Client in a household?

Click to include all household members (black arrow).

Click Me (green arrow) to add yourself as the case manager, **OR** click **ServicePoint User** (purple arrow) to select someone else from your agency to be the case manager.

If click **ServicePoint User**: select the case manager from the drop down list (red arrow).

**Name:** the case manager's name appears once a case manager is selected.

**Title/Phone Number/Email Address:** this information will appear if this information was added to their HMIS license.

Click **Add Case Manager**.

You will be returned to the client's Summary page.

# Entry/Exits

Click Add Entry/Exit (blue arrow) The Entry Data page appears

Program	Type	Entry Date	Exit Date
No matches.			

Add Entry / Exit

**Project Start Data - (20) Lee, Tom**

**Household Members**

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

- (5) Male Single Parent
  - (20) Lee, Tom
  - (21) Lee, Baby

**Project Start Data - (20) Lee, Tom**

Provider \* The Salvation Army, Santa Barbara (27) ▼

Type \* HUD ▼

Project Start Date \* 02 / 01 / 2018 12 : 19 : 18 PM

Save & Continue Cancel

Click **Save & Continue**

**Client in a household?** Click the box to add all household members to the project entry (black arrow).

**Provider:** defaults to the provider you are in.

**Have access rights to enter data in other providers?**

**Need to change the Provider?**

Select the correct Provider from the drop down menu (green arrow)

**Type:** select **HUD** (red arrow), unless you have been instructed to select something else (example: SSVF clients must select VA; PATH clients must select PATH)

**Entry Date:** defaults to today's date. Change date if need to change to an earlier date.

The **Entry Exit Data** page appears (see next page for details)

# Entry/Exit Data: Intake

Entry Assessment

Select an Assessment

HUD CoC & ESG Entry SO ES SH (2017) SB  HUD CoC & ESG Exit (2017) SB  HUD CoC & ESG Update (2017) SB  Child Intake 2017 SB

Domestic Violence Questions

Household Member

(14133) test2, test  
Age: 27  
Veteran: No (HUD)

HUD CoC & ESG Entry SO ES SH (2017) SB Entry Date: 06/22/2018 10:04:25 AM

Client Location \* CA-603

Relationship to Head of Household \* Self (head of household)

Date of Birth \* 01 / 01 / 1991

Date of Birth Type \* Full DOB Reported (HUD)

After clicking **Save**, the page refreshes.

**New Client** (black arrow) has a green checkmark. This means you have verified their demographics as accurate.

**New Client** is highlighted in blue. This means you are in New Client's file.

**Next Step:** Enter Intake data.

### Client an adult?

Click on **HUD CoC & ESG Entry** depending on your program (red arrow)

### Client a child?

Click on **Child Intake 2017 SB** (blue arrow)

# Standard Intake

## Section 1: Client Location and Relationship to Head of Household

Household Members		HUD CoC & ESG Entry All Other Projects (2017) SB		Entry Date: 05/09/2017 01:41:07 PM	
<input checked="" type="checkbox"/>	(267376) Client, New Age: 47 Veteran: Yes (HUD)	Client Location *	CA-603	G	
<input checked="" type="checkbox"/>	(267450) Client, Nouveau Age: 15 Veteran: No (HUD)	Relationship to Head of Household *	Self (head of household)		
<input checked="" type="checkbox"/>	(267449) Client, Nuevo Age: 45 Veteran: No (HUD)	Date of Birth *	04 / 05 / 1980		
		Date of Birth Type *	Full DOB Reported (HUD)		
		Primary Race *	American Indian or Alaska Native (HUD)		
		Secondary Race	American Indian or Alaska Native (HUD)		
		Ethnicity *	Non-Hispanic/Non-Latino (HUD)		
		Gender *	Male		
		Residence Prior to Project Entry *	Place not meant for habitation (HUD)		

**Client Location**  
Select **603**  
(green arrow)

**Relationship to Head of Household:**  
Since **New Client** is the head of household, select **Self** (red arrow)

**Remaining data fields:**





There should be data in most of these fields since you entered this data on the **Client Search** page. Add or update data as needed.

**Scroll down to next section** (see next page for details).

# Standard Intake

## Section 2: Residence Prior to Entry & Housing Status


Examples how the following questions could change:

<b>Residence Prior to Project Entry *</b>	Place not meant for habitation (HUD)
<b>Length of Stay in Previous Place *</b>	-Select-
<b>Approximate date homelessness started: *</b>	<input type="text"/> / <input type="text"/> / <input type="text"/>    G
<b>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 *</b>	-Select-  G
<b>Total number of months homeless on the street, in ES or SH in the past three years *</b>	-Select-

<b>Residence Prior to Project Entry *</b>	Hospital or other residential non
<b>Length of Stay in Previous Place *</b>	-Select-
<b>Did you stay less than 90 days? *</b>	G




<b>Residence Prior to Project Entry *</b>	Owned by client, no ongoing housi
<b>Length of Stay in Previous Place *</b>	Two to six nights
<b>Did you stay less than 7 nights? *</b>	Yes G
<b>On the night before did you stay on the streets, ES or SH? *</b>	-Select-  G

Select best match for all **bold** data fields

### Living Situation:

Depending on what kind of project client is entering into, clients may have different questions. (Emergency Shelter and Street Outreach have different questions form all other programs)

Questions are conditional, so depending how the question is answered the next questions will change.

Housing Move-in Date  /  /     G

has moved in to housing (used for permanent housing projects)

**Housing Move-in Date:** Enter the date when the client



# Standard Intake

## Section 3: Income

Income from Any Source (blue arrow)

Regardless if client does or does not have Monthly Income Cash Benefits: click HUD Verification (black arrow)

**HUD Verification: Monthly Income - Cash Benefits for 07/23/2015**

Per Source of cash benefits, the current records for Monthly Income - Cash Benefits as of 07/23/2015 are displayed below. Any previous records for Monthly Income - Cash Benefits not overlapping as of this date are not displayed. In the event that multiple records exist per Source of cash benefits as of 07/23/2015, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Currently receiving income source? value for all Incomplete Source of cash benefits records

- No
- Data Not Collected
- Incomplete

Source of cash benefits	Currently receiving income source?			
	Yes	No	Data Not Collected	Incomplete
Earned Income (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Allimony or Other Spousal Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save Save & Exit Exit

Because the majority of the clients will not be receiving all incomes, it's easy to press "NO" (list will populate with "No"s)

Select **Yes** for each Income Source client is currently receiving

A pop-up window appears when **Yes** is selected:

**Monthly Amount:** enter amount

**Receiving Income Source:** enter Yes

**Start Date:** enter date client began earning income; if this is not known, use client's entry date

**End Date:** leave blank

Click **Save & Exit**

Repeat above if **Yes** selected for other **Income Source**

Click **Save & Exit** when done

HUD Verification changes to

**What is HUD Verification?**


**Triangle is red:**

one or more data fields missing data

**Icon is green:** no

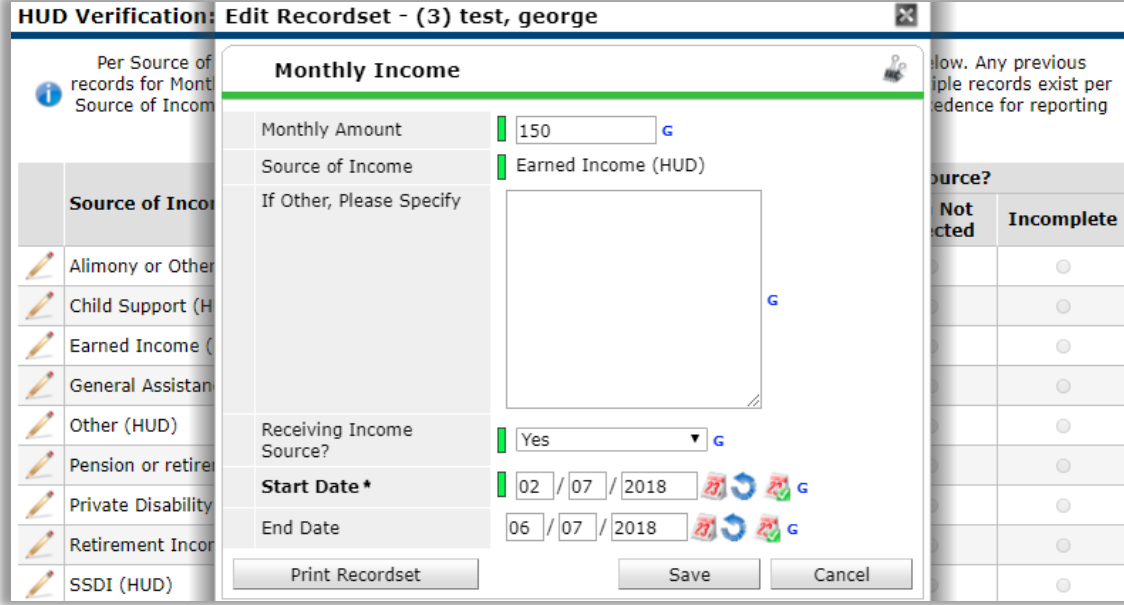
missing data

# HUD Verification Process-Monthly Income

If the client already has income data entered into HMIS, verify the income is correct by answering **Income from Any Source** question and by clicking on: **HUD Verification** .

After clicking on '**HUD Verification**', click the pencil icon (red arrow) if changes need to be made to any source of income. If there has been a change to a source of earned income (regardless if it was an increase or decrease) enter an end date one day prior to the start date of the client's current income. *For example, if the client was previously earning \$150 per month and then started earning \$200 per month on 6/8/18, enter an end date of 6/7/2018 for the \$150 per month recordset (blue arrow).*

Click save.



**HUD Verification: Edit Recordset - (3) test, george**

Per Source of records for Month  
Source of Income

**Monthly Income**

Monthly Amount: 150 G

Source of Income: Earned Income (HUD)

If Other, Please Specify:  G

Receiving Income Source?: Yes G

Start Date\*: 02 / 07 / 2018 G

End Date: 06 / 07 / 2018 G

Print Recordset Save Cancel

Source of Income?	Not Selected	Incomplete
		<input type="radio"/>
		<input type="radio"/>
		<input type="radio"/>
		<input type="radio"/>
		<input type="radio"/>
		<input type="radio"/>
		<input type="radio"/>
		<input type="radio"/>
		<input type="radio"/>
		<input type="radio"/>

If the date of the change to the client's earned income is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current income.

# HUD Verification Process-Monthly Income-Continued

After clicking save, you will notice that the marking will change from **Yes/No** to **Incomplete** (red arrow) and the **HUD Verification** icon will change from green check mark to a red triangle (red arrow).


**HUD Verification: Monthly Income for 06/08/2018**

Per Source of Income, the current records for Monthly Income as of 06/08/2018 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 06/08/2018, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Income Source? value for all incomplete Source of Income records

No  
 Data Not Collected  
 Incomplete

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>


HUD Verification 

End Date

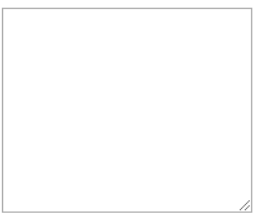
Change the *Receiving Income Source* (blue arrow) response to **Yes** if the client is currently receiving income or **No** if the client is no longer receiving income. The *Add Recordset* pop up window will appear if you select **Yes**. Here, you will enter the client's new income change in the *Monthly Amount* (black arrow), verify or edit the start date, then click **Save & Exit**.

**Add Recordset**




**Monthly Income**




Monthly Amount: 200 

Source of Income: Earned Income (HUD)


If Other, Please Specify: 

Receiving Income Source?: Yes

Start Date\*: 06 / 08 / 2018   

End Date:  /  /    

Save Cancel

The HUD Verification will change to  indicating that there is no missing data.

If the date of the change to the client's earned income is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current income.

# Standard Intake

## Section 4: Non-Cash Benefits

Non-cash benefit from any source \* Yes (HUD) G

**Non-Cash Benefits** HUD Verification

Non-cash benefit source	Start Date *	End Date
Add		

Non-Cash benefit from any source (blue arrow)

Regardless if client does or does not have Non-Cash Benefits click **HUD Verification** (black arrow)

Per Non-cash benefit source, the current records for Non-Cash Benefits as of 10/05/2012 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 Non-cash benefit source as of 10/05/2012, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Currently receiving benefit? value for all incomplete Non-cash benefit source records

Yes  
 No  
 Data Not Collected  
 Incomplete

Non-cash benefit source	Currently receiving benefit?			
	Yes	No	Data Not Collected	Incomplete
Special Supplemental Nutrition Program for WIC (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
TANF Child Care Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
TANF Transportation Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other TANF-Funded Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other Source (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Save Save & Exit Exit

Select **Yes** for each Non-Cash benefit the client is currently receiving. Select **No** for all other benefits. Enter rental assistance as "Other Source" and specify the type of rental assistance (e.g. Tenant Based Rental Assistance, Section 8, Rapid Rehousing, Shelter Plus Care) in the 'If Other' text box (green arrow). Click **Save**.

If **Yes**, click on the pencil icon to enter more detail and **Edit Record Set** pop-up will appear. For Start Date, enter date client began receiving benefit; if this is not known, use the client's entry date. Leave End Date blank. Click **Save**.

Please note that the collecting an amount (red arrow) is not required for non-cash benefits.

Click **Save & Exit**.

The HUD Verification will change to indicating that there is no missing data

**Edit Recordset - (25) Doe, John**

**Non-Cash Benefits**

Amount of Non-Cash Benefit  G

Source of Non-Cash Benefit Other Source (HUD)

If Other, Please Specify  G

Receiving Benefit? Yes  G


Start Date \* 06 / 01 / 2018 G

End Date  /  /  G

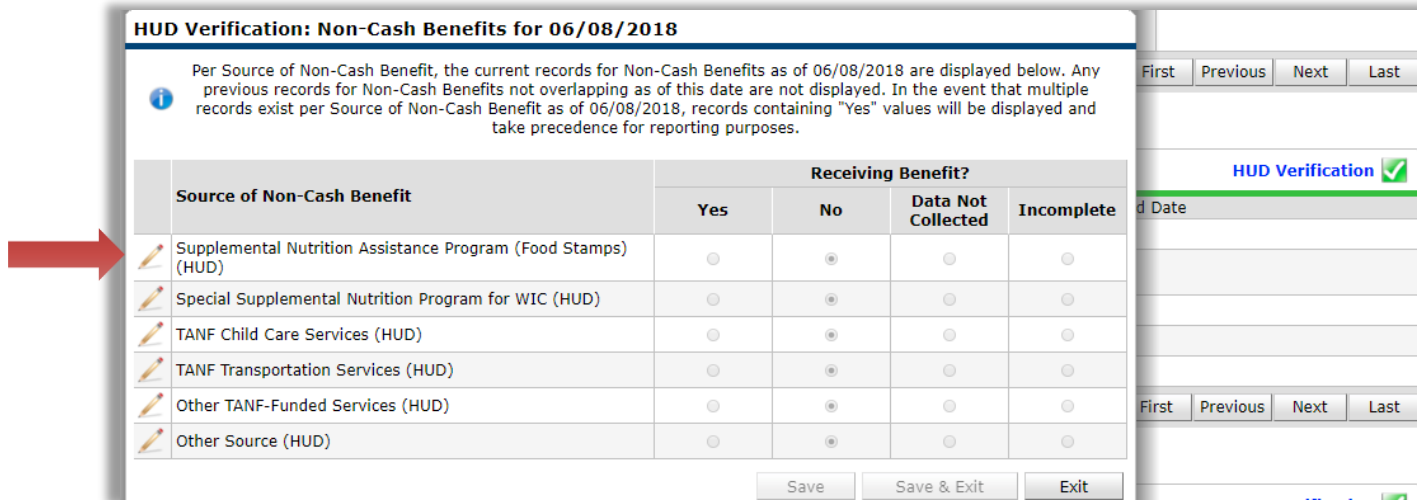
Print Recordset Save Cancel



# HUD Verification Process- Non-Cash Benefits







Only items that are HUD approved choices will appear in the verification window. If the client already has non-cash benefits data entered into HMS, Verify the data is correct by answering *Non-cash benefit from any source* question and clicking on the **HUD Verification** . Then click on the appropriate **pencil icon** (red arrow) if changes need to be made. If there has been any change to a non-cash benefit, enter an end date of one day prior to the start date of the client's current non-cash benefit.

*For example, if the client had not been receiving Food Stamps and began receiving \$175 in Food Stamps on 6/8/18, enter an end date of 6/7/18 for the No Food Stamps Recordset (blue arrow).*

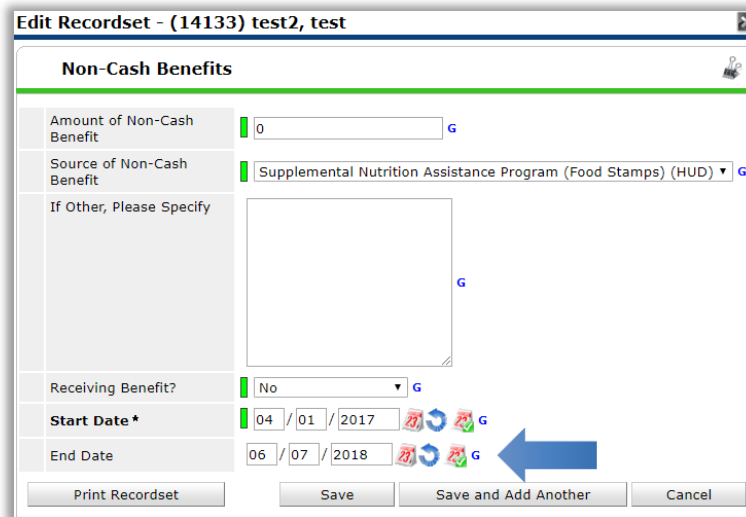


**HUD Verification: Non-Cash Benefits for 06/08/2018**

Per Source of Non-Cash Benefit, the current records for Non-Cash Benefits as of 06/08/2018 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 06/08/2018, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Source of Non-Cash Benefit	Receiving Benefit?			
	Yes	No	Data Not Collected	Incomplete
 Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Special Supplemental Nutrition Program for WIC (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 TANF Child Care Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 TANF Transportation Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Other TANF-Funded Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Other Source (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Buttons: Save, Save & Exit, Exit



**Edit Recordset - (14133) test2, test**

**Non-Cash Benefits**

Amount of Non-Cash Benefit: 0

Source of Non-Cash Benefit: Supplemental Nutrition Assistance Program (Food Stamps) (HUD)

If Other, Please Specify: [Empty Text Area]

Receiving Benefit?: No

Start Date\*: 04/01/2017






End Date: 06/07/2018

Buttons: Print Recordset, Save, Save and Add Another, Cancel

If the date of the change to the client's benefits is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current benefits.

# HUD Verification Process- Non-Cash Benefits- Continued

After clicking save, you will notice that the marking will change from *Yes, No, or Data Not Collected* to *Incomplete* (red) and the HUD Verification icon will change from green check mark to a red triangle (red).

Source of Non-Cash Benefit	Receiving Benefit?				HUD Verification 
	Yes	No	Data Not Collected	Incomplete	
Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
 Special Supplemental Nutrition Program for WIC (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
 TANF Child Care Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
 TANF Transportation Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	


Change the *Receiving Benefit* (blue arrow) selection to *Yes* or *No* depending on the change to the client's Non-Cash Benefits. For our example client, select *Yes*. Click Save then click on the Pencil icon to change the amount of the Non-Cash Benefit.

The *Edit Recordset* window will appear. Here you will indicate the client currently receives \$175 in Food Stamps (black arrow) and enter the start date. Do not make changes to *Receiving Benefit*, this will automatically apply when you clicked **Yes** or **No** for the *Receiving Benefit* (blue arrow). Click **Save**.

**Edit Recordset - (14133) test2, test**

---

**Non-Cash Benefits**

Amount of Non-Cash Benefit:  

Source of Non-Cash Benefit:


If Other, Please Specify:

Receiving Benefit?:

Start Date \*:  /  /

End Date:  /  /

Print Recordset   Save   Save and Add Another   Cancel

The HUD Verification will change to  indicating that there is no missing data.

If the date of the change to the client's benefits is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current benefits.

# Standard Intake

## Section 5: Health Insurance

Covered by Health Insurance \*  G

**Health Insurance** HUD Verification

Start Date *	Health Insurance Type	Covered?	End Date
<input type="button" value="Add"/>			

Covered by Health Insurance (blue arrow)

Regardless if client does or does not have doesn't have Health Insurance:

Click HUD Verification (black arrow).

**HUD Verification: Health Insurance for 10/18/2011**

Per Health Insurance Type, the current records for Health Insurance as of 10/18/2011 are displayed below. Any previous records for Health Insurance not overlapping as of this date are not displayed. In the event that multiple records exist per Health Insurance Type as of 10/18/2011, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Covered? value for all incomplete Health Insurance Type records

Yes  
 No  
 Data Not Collected  
 Incomplete

Health Insurance Type	Covered?			
	Yes	No	Data Not Collected	Incomplete
MEDICAID	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
MEDICARE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
State Children's Health Insurance Program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Veteran's Administration (VA) Medical Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Employer - Provided Health Insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Health Insurance obtained through COBRA	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Private Pay Health Insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
State Health Insurance for Adults	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Indian Health Services Program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Select **Yes** for each Health Insurance Type client is currently receiving, otherwise select **No**.

Once **Yes** or **No** has been selected for each type, click **Save**.

If **Yes**, click on the pencil icon to enter more detail and **Edit Record Set** pop-up will appear. For Start Date, enter date client obtained insurance; if this is not known, use the client's entry date. You can enter to specify the 'If Other' option (red arrow) as well as entering HOPWA information if applicable. HOPWA question are only required for projects funded by HOPWA. Click **Save & Exit**.

The HUD Verification will change to indicating that there is no missing data

**Edit Recordset - (25) Doe, John**

**Health Insurance**

Start Date \* 06 / 28 / 2017

Health Insurance Type Other

(If Yes to Other) Specify Source

Covered? No


(HOPWA) If Private Pay Insurance, Specify

(HOPWA) If No, Reason not covered -Select-

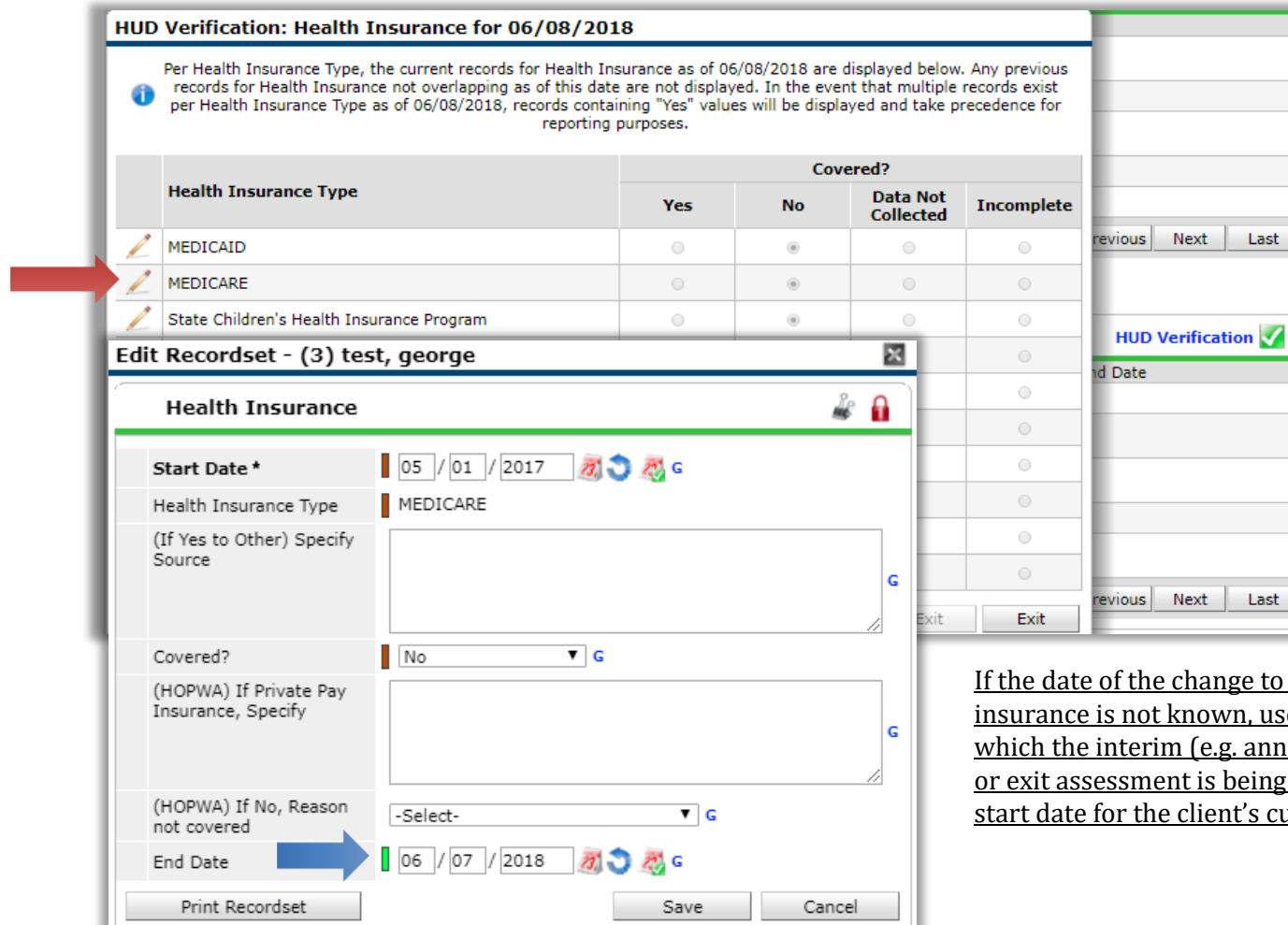
End Date

# HUD Verification Process-Health Insurance

If the client already has health insurance data entered into HMIS, verify the data is correct by answering the *Covered by Health*




*Insurance* question and by clicking **HUD Verification** . After clicking on HUD Verification, click the pencil icon (red arrow) if changes need to be made to any types of health insurance. If there was a change to the client's health insurance, enter an end date one day prior to the start date of the client's current health insurance status.

For example, if the client previously had no health insurance but obtained MEDICARE as of 6/8/18, enter an end date of 6/7/18 for the pertinent recordset (blue arrow). Then click **Save**.



**HUD Verification: Health Insurance for 06/08/2018**

Per Health Insurance Type, the current records for Health Insurance as of 06/08/2018 are displayed below. Any previous records for Health Insurance not overlapping as of this date are not displayed. In the event that multiple records exist per Health Insurance Type as of 06/08/2018, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Health Insurance Type	Covered?			
	Yes	No	Data Not Collected	Incomplete
 MEDICAID	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 MEDICARE	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 State Children's Health Insurance Program	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Edit Recordset - (3) test, george**

**Health Insurance**

Start Date \* | 05 / 01 / 2017

Health Insurance Type | MEDICARE

(If Yes to Other) Specify Source

Covered? | No

(HOPWA) If Private Pay Insurance, Specify

(HOPWA) If No, Reason not covered | -Select-

End Date | 06 / 07 / 2018

Buttons: Print Recordset, Save, Cancel

If the date of the change to the client's insurance is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current insurance.



# HUD Verification Process-Health Insurance-Continued

After clicking save, you will notice that the marking will change from *Yes, No, or Data Not Collected* to *Incomplete* (red) and the HUD Verification icon will change from green check mark to a red triangle (red).

Health Insurance Type	Covered?			
	Yes	No	Data Not Collected	Incomplete
MEDICAID	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
MEDICARE	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
State Children's Health Insurance Program	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Veteran's Administration (VA) Medical Services	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employer Provided Health Insurance	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Change the *Covered?* (blue) response to **Yes** or **No** depending on the change of the client's Health Insurance Type. Click **Save**.

If **Yes**, click on the pencil icon to enter more detail on the Health Insurance Type and **Edit Record Set** pop-up will appear. Here, you can enter to specify source of 'Other' option (green arrow) as well as entering HOPWA related information if applicable.

For the example client, you will enter the client's new MEDICARE information (black arrow). Then click **Save & Exit**.

The HUD Verification will change to indicating that there is no missing data.

If the date of the change to the client's insurance is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current insurance.

# Standard Intake

## Section 6 Disability

Does the client have a disabling condition? \*  G

Disabilities HUD Verification

Disability Type *	Disability determination	Start Date *	End Date
<input type="button" value="Add"/>			

Does the client have a disabling condition (blue arrow):

Regardless if client has or does not have Disability Type click **HUD Verification** (black arrow)

**HUD Verification: Disabilities for 07/23/2015**

Per Disability Type, the current records for Disabilities as of 07/23/2015 are displayed below. Any previous records for Disabilities not overlapping as of this date are not displayed. In the event that multiple records exist per Disability Type as of 07/23/2015, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Disability determination value for all incomplete Disability Type records

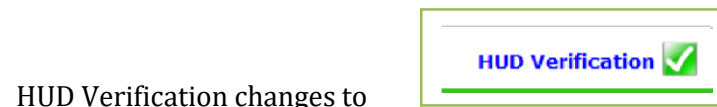
- No (HUD)
- Client doesn't know (HUD)
- Client refused (HUD)
- Data not collected (HUD)
- Incomplete

Disability Type	Disability determination					
	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete
Alcohol Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Both Alcohol and Drug Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chronic Health Condition (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Developmental (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Drug Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HIV/AIDS (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mental Health Problem (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Physical (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Select **Yes**, **No**, **Client Doesn't Know** or **Client Refused** for each disability type client self-reports.

If select **Yes**: a pop-up window appears. Select best match for each question. For Start Date, enter date client's disability began; if this is not known, use the client's entry date. Click **Save**.

Once each Disability Type has been answered: click **Save & Exit**.




Finished entering Intake data?

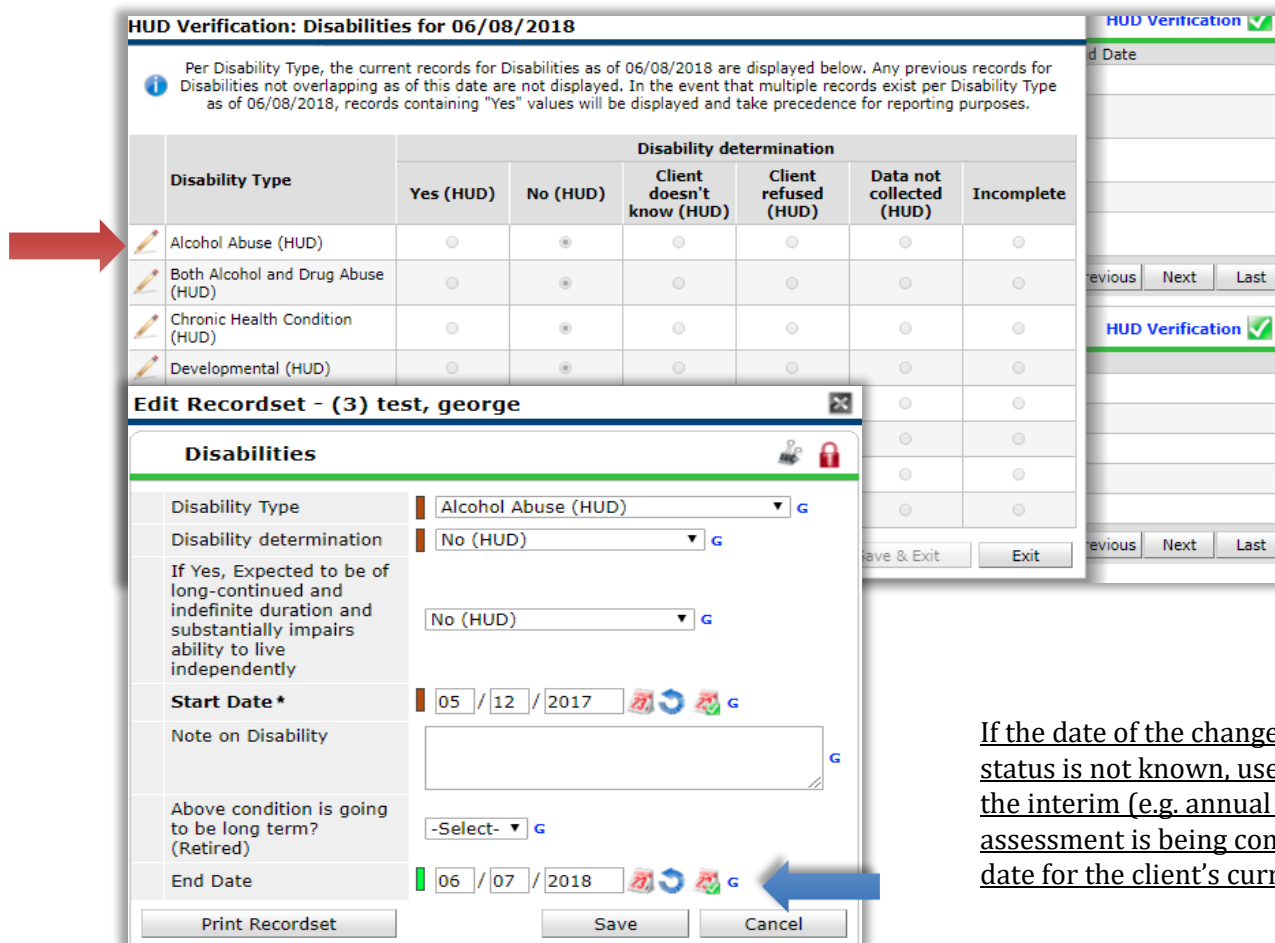
- **Client single?** Click **Save & Exit**.
- **Client in a Household?** Click **Save**.

If a pop-up window appears: it will let you know if there are any data elements missing answers. Provide answers for those data elements, then click **Save**.

# HUD Verification Process- Disabilities

If the client already has disability data entered into HMIS, verify the income is correct by answering the *Does the client have a disabling condition* question and clicking on **HUD Verification** . After clicking on HUD Verification, click on the pencil icon (red arrow) if changes need to be made to any type of disability data. If there has been a change regarding a client's disability, enter an end date one day prior to the start date of the client's current disability data.

For example, if the client previously did not have any disabilities and then Alcohol Abuse was indicated 6/8/18, enter an end date of 6/7/2018 for the Alcohol Abuse "No" recordset (blue arrow). Then click **Save**.



**HUD Verification: Disabilities for 06/08/2018**

Per Disability Type, the current records for Disabilities as of 06/08/2018 are displayed below. Any previous records for Disabilities not overlapping as of this date are not displayed. In the event that multiple records exist per Disability Type as of 06/08/2018, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Disability Type	Disability determination					
	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete
Alcohol Abuse (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Both Alcohol and Drug Abuse (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chronic Health Condition (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Developmental (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Edit Recordset - (3) test, george**

**Disabilities**

Disability Type: Alcohol Abuse (HUD) G

Disability determination: No (HUD) G

If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently: No (HUD) G

Start Date\*: 05 / 12 / 2017 G

Note on Disability: G

Above condition is going to be long term? (Retired): -Select- G

End Date: 06 / 07 / 2018 G

Buttons: Print Recordset, Save, Cancel

If the date of the change to the disability status is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current disability status.

# HUD Verification Process- Disabilities - Continued

After clicking save, you will notice that the marking will change from *Yes (HUD)*, *No (HUD)*, *Client doesn't know (HUD)*, *Client refused (HUD)*, or *Data not collected (HUD)* to *Incomplete (red arrow)* and the HUD Verification icon will change from green check mark to a red triangle (red).

**HUD Verification: Disabilities for 06/08/2018**

Per Disability Type, the current records for Disabilities as of 06/08/2018 are displayed below. Any previous records for Disabilities not overlapping as of this date are not displayed. In the event that multiple records exist per Disability Type as of 06/08/2018, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Disability determination value for all incomplete Disability Type records

- [No \(HUD\)](#)
- [Client doesn't know \(HUD\)](#)
- [Client refused \(HUD\)](#)
- [Data not collected \(HUD\)](#)
- [Incomplete](#)







Disability Type	Disability determination					
	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete
Alcohol Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Both Alcohol and Drug Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chronic Health Condition (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

HUD Verification

Select the *Disability determination* selection to from *Yes (HUD)*, *No (HUD)*, *Client doesn't know (HUD)*, *Client refused (HUD)*, or *Data not collected (HUD)* depending what change of disability the client has (blue).

**Add Recordset**

**Disabilities**

Disability Type	Alcohol Abuse (HUD)
Disability determination	Yes (HUD)
If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	-Select- ▼ G
<b>Start Date *</b>	06 / 08 / 2018    G
Note on Disability	<input type="text"/> G
Above condition is going to be long term? (Retired)	-Select- ▼ G
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>    G


Save Cancel

*Add Recordset* pop up window will appear if selected *Yes(HUD)*.

Answer the questions by selecting the answers from the drop down options.

For the example client, the start state is 6/8/18.

Click **Save**.

The HUD Verification will change to  indicating that there is no missing data.

If the date of the change to the disability status is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current disability status.



# Domestic Violence Assessment

The Domestic Violence Questions Assessment must be completed for adult clients entering projects receiving the following types of funding: CoC, ESG, HUD VASH, HUD VASH OTH, VA HCHV: CRS EH, VA GPD: All, and HOPWA: All. This assessment must also be completed as part of these clients' interim review (e.g. annual assessment).

Domestic violence data entered via this assessment will not be shared in HMIS or discussed during Coordinated Entry System case conferencing.

To begin, click Save after completing the standard intake assessment (see preceding pages). Then scroll up to the top of the intake assessment window and click on the Domestic Violence Questions assessment. (red arrow)

**Select an Assessment**

HUD CoC & ESG Entry SO ES SH (2017) SB

HUD CoC & ESG Exit (2017) SB

HUD CoC & ESG Update (2017) SB

Child Intake 2017 SB

Domestic Violence Questions ←

**Household Members**

(4) test1, test1  
 Age: 20  
 Veteran: No (HUD)

**HUD CoC & ESG Entry SO ES SH (2017) SB** Entry Date: 02/14/2018 12:15:06 PM

<b>Client Location *</b>	CA-603 <span style="float: right;">G</span>
<b>Relationship to Head of Household *</b>	Self (head of household) <span style="float: right;">G</span>
<b>Date of Birth *</b>	01 / 01 / 1998 <span style="float: right;">   G</span>
<b>Date of Birth Type *</b>	Full DOB Reported (HUD) <span style="float: right;">G</span>
<b>Primary Race *</b>	American Indian or Alaska Native (HUD) <span style="float: right;">G</span>
Secondary Race	Asian (HUD) <span style="float: right;">G</span>
<b>Ethnicity *</b>	Hispanic/Latino (HUD) <span style="float: right;">G</span>
<b>Gender *</b>	Male <span style="float: right;">G</span>
<b>Residence Prior to Project Entry *</b>	Place not meant for habitation (HUD) <span style="float: right;">G</span>
<b>Length of Stay in Previous Place *</b>	Two to six nights <span style="float: right;">G</span>

# Domestic Violence Questions

If the answer to the first question (red arrow) is *Yes*, answer the following two questions. If the answer to the first question is *No*, do not answer the following two questions.

### Entry Assessment

---

#### Select an Assessment

HUD CoC & ESG Entry SO ES SH (2017) SB

HUD CoC & ESG Exit (2017) SB

HUD CoC & ESG Update (2017) SB

Child Intake 2017 SB

**Domestic Violence Questions**

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#### Household Members

(4) test1, test1  
Age: 20  
Veteran: No (HUD)

#### Domestic Violence Questions

Entry Date: 02/14/2018 12:15:06 PM

**Domestic violence victim/survivor** \*

If yes for Domestic violence victim/survivor, when experience occurred

If yes for Domestic Violence Victim/Survivor, are you currently fleeing?

**Finished with the Intake process?** Click **Save & Exit**.

To complete project intake for other household members, click **Save** and follow directions below.



# Standard Intake

## Completing Project Entry for Household members

**Note: Nouveau Client is a child**

Click **Child Intake 2017 SB** (orange arrow)

Then switch to Nouveau Client (black arrow)

Click **Save**.

Child Intake is much shorter than the Adult Intake.

Enter data in:

- ☐ **Relationship** select best match. In this

example **Head of Household's child**

Then scroll down and complete:

- **Client's Current/Most Recent Address**
- **Disabilities**
- **Health Insurance**

Click **Save**

Disability Type*	Start Date*	End Date
Physical (HUD)	10/08/2014	
Mental Health Problem (HUD)	10/08/2014	
Developmental (HUD)	10/08/2014	
Both Alcohol and Drug Abuse (HUD)	10/08/2014	
HIV/AIDS (HUD)	10/08/2014	

Start Date*	Health Insurance Type	Covered?	End Date
10/08/2014	MEDICAID	No	
10/08/2014	MEDICARE	No	
10/08/2014	State Children's Health Insurance Program	Yes	

# Standard Intake

## Completing Project Entry for Household members

**Select an Assessment**

VA SSVF Entry for HP and RRH (2017) SB
  VA SSVF Exit (2017) SB
  VA SSVF Update (2017) SB
  **HUD CoC & ESG Entry All Other Projects (2017) SB**

HUD CoC & ESG Entry SO ES SH (2017) SB
  HUD CoC & ESG Exit (2017) SB
  HUD CoC & ESG Update (2017) SB
  HHS PATH Entry for SSO (2017) SB

**Household Members**

- (267376) Client, New  
Age: 47  
Veteran: Yes (HUD)
- (267450) Client, Nuevo  
Age: 15  
Veteran: No (HUD)
- (267449) Client, Nuevo  
Age: 45  
Veteran: No (HUD)

**HUD CoC & ESG Entry All Other Projects (2017) SB** Entry Date: 05/09/2017 01:41:07 PM

**Client Location \*** CA-603

**Relationship to Head of Household \*** Self (head of household)

**Date of Birth \*** 04 / 05 / 1980

**Date of Birth Type \*** Full DOB Reported (HUD)

**Primary Race \*** American Indian or Alaska Native (HUD)

**Secondary Race** American Indian or Alaska Native (HUD)

**Ethnicity \*** Non-Hispanic/Non-Latino (HUD)

**Note: Nuevo Client is an adult.**

Click **HUD CoC & ESG Entry All other Projects or HUD CoC & ESG Entry SO ES SH (2017) SB** (red arrow) depending on your program...

Complete the Intake (how to complete the Intake for an adult starts on page 14).

Follow the above steps (for either an Adult or for a Child) until Intakes have been completed for all household members.

# VI- SPDAT

## Vulnerability Index-Service Prioritization Decision Assistance Tool

The image shows two forms side-by-side. The top form is titled 'VI-SPDAT v2.0' and has a search icon. Below the title is a row of tabs: 'Start Date\*', 'PRE-SURVEY', 'A. HISTORY OF HOUSING AND HOMELESSNESS', 'B. RISKS', 'C. SOCIALIZATION & DAILY FUNCTIONS', 'D. WELLNESS', and 'GRAND TOTAL'. Below this row is an 'Add' button with a green arrow pointing to it. The bottom form is titled 'VI-FSPDAT v2.0' and also has a search icon. Below the title is a row of tabs: 'Start Date\*', 'PRE-SURVEY', 'A. HISTORY OF HOUSING AND HOMELESSNESS', 'B. RISKS', 'C. SOCIALIZATION & DAILY FUNCTIONS', 'D. WELLNESS', 'E. FAMILY UNIT', and 'GRAND TOTAL'. Below this row is an 'Add' button with a blue arrow pointing to it.

At the Bottom of the Client Summary Page there is a VI-SPDAT

Only use **VI-SPDAT v2.0**, Click **Add** (green arrow)

Or the **VI-FSPDAT v2.0**, Click Add (blue arrow)

VI-SPDATs questions will pop up, answer questions and click save and exit at the bottom.

# Services

Click **Multiple Services** (blue arrow) to add one or more service transactions. Service transaction(s) can be added to a single client or to the household.

**Adding only one (1) service transaction?** Click **Add Service**. This allows you to enter more information about the service transaction.



Start Date	End Date	Provider
No matches.		

Add Service   Add Multiple Services

See next page on how to enter a service transaction.

# Service Transactions

Clicking **Multiple Services** takes you to the client's Service Transactions page.


**Client - (267376) Client, New**

(267376) Client, New  
Release of Information: **None**

Client Information

Household Members

**To include Household members for these Services, click the**

(55790) Two Parent Family 


(267376) Client, New

(267450) Client, Nouveau








(267449) Client, Nuevo

Multiple Services

**Be sure to select the correct Provider before entering data in the Service List below. If you are currently in the Service List, you can click the refresh icon to update the list.**

Service Provider\* County of Santa Barbara (1) 

Service List

Number of Services *	<input type="text" value="1"/>
Start Date *	10 / 13 / 2014   8 : 16 : 58 AM 
End Date	10 / 13 / 2014   8 : 16 : 58 AM 
Service Type *	-Select- 

Screenshot is the top portion of Service Transactions.

**Client in a household?  
Want to assign the service transaction to the household?**  
Click box for family (blue arrow)

**Service Provider** default to the provider you are in (black arrow). Change to another provider if necessary.

**Start Date/End Date** defaults to today's date (red arrow). Change if necessary.

**Service Type** select best match (green arrow)

# Service Transactions

Clicking **Multiple Services** takes you to the client's Service Transactions page.

The screenshot shows a form with three main sections:

- Service Costs:** Contains fields for 'Number of Units' (with a blue arrow pointing to it), 'Unit Type' (dropdown menu), 'Cost per Unit' (with a dollar sign), and 'Total Cost of Units' (with a dollar sign).
- Apply Funds for Service:** Contains a 'Funding Sources' section with a table header 'Source' and a button 'Add Funding Source' (with a black arrow pointing to it).
- Need Information:** Contains fields for 'Need Status\*' (dropdown menu with 'Identified' selected, with a red arrow pointing to it), 'Outcome of Need' (dropdown menu), and 'If Need is Not Met, Reason' (dropdown menu).

Screenshot is the bottom portion of Service Transactions.

**Service Costs** (red arrow)

Skip this section. No Santa Cruz Agency/Provider collecting Service Costs (i.e. the amount of time spend providing a service)

**Funding Source:** click **Add Funding Source** (black arrow) if your Agency/Provider tracks the funding source paying for the service.

**Needs Information** (red arrow)

**Able to meet Need (that is, service was provided)?**

**Need Status:** select **Closed**

**Outcome of Need:** select **Fully Met**

**Not able to meet Need?**

**Need Status:** **Closed**

**Outcome of Need:** **Not Met**

**If Need is Not Met, Reason:** select best match

The screenshot shows a row of buttons: 'Add Another' (with an orange arrow pointing to it), 'Remove All', and 'Clear All'. Below this row are two more buttons: 'Save & Exit' (with a purple arrow pointing to it) and 'Cancel'.

data complete.

Screenshot of bottom of page.

Click **Add Another** (orange arrow) to add another service transaction. Click **Save & Exit** (purple arrow) when finished adding service transaction(s).

**Congratulations! Entry of Intake and Service Transaction**

# Additional Assistance

**For any additional technical assistance**

**Email us:** [helpdesk@ctagroup.org](mailto:helpdesk@ctagroup.org)

OR

By visiting our **Website:** → <https://ctagroup.org/santa-barbara-hmis>

