

HMIS Introductory Training

The HMIS Introductory Series is the basic course every HMIS user is required to participate in to gain access to the ServicePoint system. This covers the essentials, such as login, searching for clients and entering client data and information.

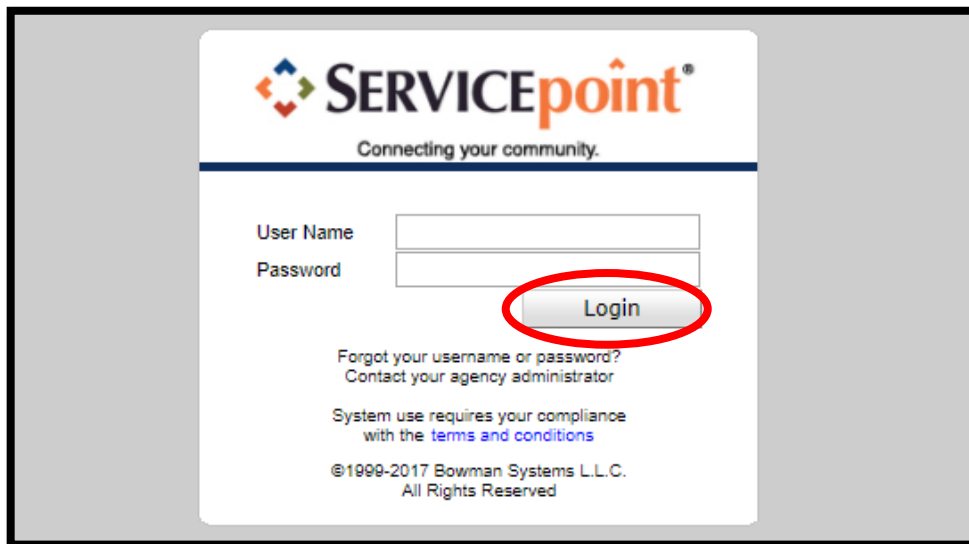
All example client names depicted herein are completely fictitious. No association with any real organization or persons is intended or should be inferred.

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After completing the Program Data Elements, click “Save” on the bottom right. If you do not have additional household members, and you have no custom assessments to complete, you may click “Save & Exit”. Otherwise, continue to the Completing Program Elements for Other Household Members (if applicable) section that outlines how to complete these assessments for the remaining household members.	22
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Login Basics

- 1) Open a web browser on your computer. You may use Google Chrome, Mozilla Firefox, Internet Explorer, or Apple Safari if you use a MAC computer. We recommend Google Chrome, though ServicePoint will work on any of those browsers listed above.
- 2) Navigate to your HMIS ServicePoint online portal.
- 3) Ensure you are on the correct login page as pictured below. Enter the relevant credentials.
 - **User Name:** Use the user name given to you by HMIS support.
 - **Password:** Use the temporary password given to you by HMIS support. Once you enter the password you will be prompted to create a new password. Passwords will expire every 45 days for security purposes. Passwords must:
 - Be at least 8 characters long
 - Contain at least 2 numbers or symbols
- 4) Click the “Login” button (circled below). A pop up will appear asking you to accept the license agreement, click “Accept”. You will then be directed to the ServicePoint website.



SERVICEpoint®
Connecting your community.

User Name

Password

Login

Forgot your username or password?
Contact your agency administrator

System use requires your compliance
with the [terms and conditions](#)

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Overview of ServicePoint Banner

Your homepage will look similar to the image below. See the corresponding numbers from the picture below to learn more about that ServicePoint feature.




- 1) **Agency/Project Name:** This is where your user account is hosted.
- 2) **Date:** Displays the current date.
- 3) **Your Name and Access Level:** The access level is normally Case Manager III or Agency Admin.
- 4) **Shadow Mode:** Users with an Agency Admin level access may shadow users at their agency only. This is NOT a remote access feature – this feature simply allows the Agency Admin to view a user’s setup. Click on “Shadow” and search for the user when prompted. Click the green plus sign to shadow an account (circled below). When you are done, click the user’s name next to the “Shadow” link to exit shadow mode.

Search Shadow Mode Users

Search for User to Shadow by using keywords for either Provider or User name.

Search ☒ Include active users ☐ Include inactive users

Search Shadow Search Results

User	Name	Provider
 HMIS_Trainer (4114)	HMIS Trainer	Community Inform

- 5) **Enter Data As:** Users that need to access more than one project/grant within an agency will use this link to navigate to multiple projects/grants. Click on “Enter Data As” and select the appropriate project/grant by clicking on the green plus sign next to the project/grant’s name. When you are done, click that project/grant name next to the “Enter Data As” link to return to original settings.

Provider Search Results						
#	A	B	C	D	E	F
	G	H	I	J	K	L
	M	N	O	P	Q	R
	S	T	U	V	W	X
	Y	Z	All			
	Provider	Level	Phone	Location	Last Updated	
	 HUD Grant NEW Combined Scattered Sites TFV (Homeward Bound) (38757)	Level 3	602-263-7654	Phoenix, AZ 85015-2748	03/01/2013	
	 Non - HUD Grant NEW Combined Scattered Sites TFV (Homeward Bound) (38758)	Level 3	602-263-7654	Phoenix, AZ 85015-2748	03/01/2013	
	 Transitional Shelter Beds Only (Homeward Bound) (14712)	Level 2	Unknown	Unknown	02/20/2013	
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- 6) **Question Mark:** This is an automated help feature within ServicePoint. Click it to be directed to help folders. Please note these are general help topics and not specific to your agency.
- 7) **Exclamation Mark:** This is an alert for new items in your System or Agency News Section.

Overview of ServicePoint Modules (menu bar)

Menu Bar (Modules): See corresponding number from the picture below to learn more about that ServicePoint Feature.

ServicePoint Training Site
Community Information & Referral
November 27, 2017

Home > Home Page Dashboard

1 Last Viewed **2 Favorites**

- 3 Home
- 4 ClientPoint
- CallPoint
- 5 ResourcePoint
- 6 ShelterPoint
- ActivityPoint
- 7 ScanPoint
- 8 Reports
- 9 Admin
- 10 Logout

System News (6)

Date	Headline
11/13/2017	January - HMIS Training Schedule
11/13/2017	December - HMIS Training Schedule
10/13/2017	November - HMIS Training Academy Schedule
04/24/2017	HMIS New User Form
10/01/2016	HMIS Intake/Exit Forms
01/01/2016	HMIS HelpDesk Contact Information

Add System News

- 1) **Last Viewed:** The last 10 client records viewed, during the current HMIS episode, will display here for a quick way to navigate back to client records. Click on client name in list to open the client record without having to search for them again. The “Last Viewed” list clears every time you logout for security purposes.
- 2) **Favorites:** Users have the ability to create a favorite list of clients for fast navigation to certain clients on their case load, or client records that need to be accessed frequently. Though technically this list can be as long as you want, only the top 10 will have an active link to the actual client record. To add a client to your favorites list, be on that client record (any tab) and then click the gold star in the upper right hand corner (in between the question and exclamation marks). Use the “Edit Favorites” link to change the order of your favorites list, or delete exited clients from your list.
- 3) **Home:** The Home button returns you to the home page. The home page is the location of System and Agency News. System News is distributed by the HMIS Support Team, it contains information about how to contact us for assistance, upcoming training, forms and system outages. Agency News can be information distributed by

your specific agency that only other users at your agency can view. (rarely used) The Follow Up window is utilized by case managers, and explained in the Case Management 200 training class.

- 4) **ClientPoint:** This is where the user searches for existing clients in the HMIS system, or creates a new client who is accessing homeless services for the first time.
- 5) **ResourcePoint:** This is the Community Information and Referral Services resource directory. It is a search engine containing thousands of referral services for the state of Arizona. This information can also be accessed by calling “211” in Arizona, or at our website: <http://www.211arizona.org/> This will be explained more in the Case Management 200 training class.
- 6) **ShelterPoint:** This is where, if applicable, your agency tracks which bed list and/or unit your client(s) are occupying. This will be explained more in the HMIS 104 training class.
- 7) **SkanPoint:** This is where services can be recorded for multiple clients at once. This will be explained more in the Case Management 201 training class.
- 8) **Reports:** This is where canned reports, created by Bowman Systems, can be accessed, ran and downloaded. Users with ART (Advanced Reporting Tool) licenses can also access the ART server here. Reporting will be explained in the ART 400 series classes.
- 9) **Admin:** Users with an Agency Admin level only can access several features here, such as User Admin (for resetting passwords) and Provider Admin. Please contact the Helpdesk for further information.
- 10) **Logout:** Users click this to logout of HMIS when they are done working in the system. Please be sure to logout, or lock your screen, whenever leaving your work area, no matter how short a time, for security purposes. ServicePoint will log you out automatically after sitting idle for 30 minutes, so please save your work regularly. Anything not saved prior to an automatic logout will be lost.
 - Note: ServicePoint will automatically log you out after sitting idle for 30 minutes. Please save your work regularly as it will not automatically save when you time out of your session.

Initial Client Entry into HMIS (ServicePoint)

This section will cover the basics of entering a client into HMIS. This section will also provide a broad overview of the screen and options a user may see.

Creating and Searching for a Client in HMIS

This section covers the basics of searching for, or creating, a client. If you are working with a family, search for, or create, the Head of Household's record first.

- 1) Get into "Enter Data As" mode
- 2) Click on the "ClientPoint" tab.
 - a. The screen will change. Refer to the picture below for next steps.

The screenshot shows the HMIS interface with two main sections. The top section, titled "Client Search", contains a form for searching for a client. It includes fields for Name (First, Middle, Last, Suffix), Name Data Quality, Alias, Social Security Number, Social Security Number Data Quality, U.S. Military Veteran?, Exact Match, Gender, Date of Birth, DOB Data Quality, Primary Race, Secondary Race, and Ethnicity. There are also radio buttons for "Search ACTIVE Clients", "Search INACTIVE / DELETED Clients", and "Search ALL Clients". A "Clear All" button is located at the bottom right of the search section. The bottom section, titled "Client Number", contains a field for "Client ID #" and a "Submit" button. A message at the top of the search section reads: "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."

- 3) Enter the search criteria, as outlined below.
 - **Name:** First and last name are required.
 - The following projects have additional guidance. Please refer to the relevant addendum.
 - SSVF
 - RHY
 - **Name Data Quality:** This dropdown describes the data quality of the name.
 - **Alias:** Section to place an alternate or second name.
 - **Social Security Number:** Only enter the digits known. Do not use placeholders for empty spaces.
 - The following project has additional guidance. Please refer to the relevant addendum.
 - SSVF
 - **SSN Data Quality:** This dropdown describes the data quality of the SSN.
 - Please note, a person without a SSN would have "Client Doesn't Know" selected.

- **U.S. Military Veteran:** Select the appropriate option from the dropdown.
 - The following projects have additional guidance. Please refer to the relevant addendum.
 - SSVF
 - RHY
- **Exact Match:** Do NOT use.
- **Gender:** Record the self-reported gender of each client served. Gender identity is a person's internal perception of themselves and may not match the sex they were assigned at birth. Simply asking, "Which of these genders best describes how you identify?" is appropriate and focuses on the person's own internal knowledge of their gender. Clients may select as many responses to the Gender field as they would like to, with up to a total of five options possible for a client's preferred identity, need or situation. *See page 18 for more detailed instruction on gender data collection.*
- **Date of Birth:** Select client's date of birth.
- **DOB Data Quality:** This dropdown describes the data quality of the date of birth.
- **Primary Race:** Specify from the dropdown the primary race your client self-identifies as. If you hover over the question, you will see detailed information on which places of origin each race encompasses. In a situation the client does not select one of the 5 races, or a country or origin that indicates one of the 5 races, select "Client Doesn't Know" or "Client Refused" as appropriate.
- **Secondary Race (Optional):** Specify from the dropdown the secondary race your client self-identifies as, if any. If they do not have a second race leave this question set at "Select". DO NOT duplicate the primary race in this field for any reason.
- **Ethnicity:** Record the self-identified ethnicity of each client served. Help the client select the ethnicity that they most identify with.

- 4) Click "Search" once all criteria have been completed.
 - a. The screen will expand. Refer to the picture below for next steps.

Client Search

Please Search the System before adding a New Client.

Name	First Training	Middle	Last Client	Suffix
Name Data Quality	Full Name Reported			
Alias				
Social Security Number				
Social Security Number Data Quality	Client refused (HUD)			
U.S. Military Veteran?	No (HUD)			
Exact Match	<input type="checkbox"/>			

Search Clear Add New Client With This Information

Client Number

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

Client ID # Submit

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
6	Client, Training						1

Showing 1-1 of 1

- 5) If your client populates under the “Client Results” section, you may select the client in one of two ways. Both methods will take you to the “Client Profile” tab, as outlined in the next section.
 - a. Click on the edit pencil to the left of the client name (circle above).
 - b. Click on their name (square above).
- 6) If your client does not populate, click the “Add New Client with this Information” button. This will create a new client record and take you to the “Client Profile” tab, as outlined in the next section.
- 7) If you are working with a family, do not continue to create each household member in this fashion. Please refer to the **Households Managing or Creation** section for further guidance.

Overview of the Client Record Screen

After selecting or creating a client, the HMIS Client Record will open. The record will open on the “Client Profile” tab by default. Use the picture below to reference the various options and tabs. Please note that you may not see every option depending on your agency’s preferences.

Client Profile: The default screen whenever you access a client record. There are various parts to this screen.

- Client Record** (circled): You may edit the client's name, SSN, and Veteran Status by clicking the edit pencil icon. You may also add a picture by clicking the "Change" button on the right.
- Client Demographics:** DO NOT use this section to input data. This is for viewing data only.
- For additional functions and sections, please refer to your agency or the Case Management training.

- Summary:** This tab provides an overall summary of the client, pulling data from all the other tabs.
- Households:** This is used to create and maintain households, or groups that may be entered into projects together.
- Entry/Exit:** This is where the bulk of your client data is entered. This includes entering your client(s) into your project, updating their record, and exiting client(s) from your project.
- Case Managers:** This is where specific case managers can be assigned to a client electronically. Further guidance is provided in Case Management training.
- Case Plans:** This is where goals can be set and case notes can be added (if you agency uses this option) to the client record. Further guidance is provided in Case Management training.
- Measurements:** This tab is not seen by all users. It is generally where the SPDAT and/or the F-SPDAT are located for data entry. You can learn more about this feature in the Case Management 204 training class.
- Assessments:** This tab is NO LONGER used and is usually hidden. If this tab is visible, do not use it.
- Service Transactions:** This is where all referrals and services can be recorded, and the history of such viewed, along with client's shelter stays. You can learn more about these features in the Case Management training.

Household Managing or Creation

By HUD's definition, a household is group of individuals who are seeking services together. This does not have to be a nuclear family.

Please Note: Clients on the household tab display current and previous associations and does not necessarily reflect that all of the clients listed on the tab will enter the program together. You may select which clients are actually entering the program together on the Entry/Exit tab.

From the Head of Household's record, click on the "Households" tab. Please refer to the picture below for next steps.

If the Head of Household already has a household established

- 1) DO NOT create another one. If the household is missing a member, or if the "relationships" are in error, click the "Manage Household" button (circled above).
 - a. A pop-up will appear. Refer to the picture below for next steps.

The screenshot shows the 'Client Information' window with the 'Households' tab selected. Below the tab bar, there is a dropdown menu showing '(5) Couple With No Child(ren)'. Below this is a table with columns: Name, Age, Head of Household, Relationship to Head of Household, Joined Household, Previous Associations, and Household Count. The table lists two members: (7) Alternate, Training and (6) Client, Training. Below the table is a button labeled 'Manage Household' which is circled in red. At the bottom, there are buttons for 'Search Existing Households', 'Start New Household', and 'Exit'.

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(7) Alternate, Training		No		11/08/2017	0	1
(6) Client, Training		No		11/08/2017	0	1

The screenshot shows the 'Household Information - (5) Couple With No Child(ren)' pop-up window. It has a title bar with a printer icon. Below the title bar, there are buttons for 'Save', 'Save & Exit', and 'Exit'. The 'Household Type' is set to 'Couple With No Child(ren)'. The 'Income' is 'US\$0.00 monthly (US\$0.00 annual)'. The 'Client Count' is '2'. Below this is a section titled 'Household Members' with a table. The table has columns: Name, Age, Head of Household, Relationship to Head of Household, Joined Household*, Previous Associations, and Household Count. The table lists two members: (7) Alternate, Training and (6) Client, Training. Below the table is a button labeled 'Add/Delete Household Members' which is circled in red. At the bottom right, there is a button labeled 'Household History Report'.

Name	Age	Head of Household	Relationship to Head of Household	Joined Household*	Previous Associations	Household Count
(7) Alternate, Training		No	husband	11 / 08 / 2017	0	1
(6) Client, Training		Yes	Self	11 / 08 / 2017	0	1

- 2) Check the existing data to ensure it is accurate.
 - a. **Household Type:** Ensure the correct household type is reflected in the associated dropdown.
 - b. **Head of Household:** There may be only 1(one) Head of Household. This is normally the person who qualifies for the project.
 - c. **Relationship to Head of Household:** Ensure the proper option is selected for each person's dropdown.

d. **Joined Household:** This is the date the members were added to the household in HMIS.

- 3) In order to add household members click on the “Add/Delete Household Members” button (circled above).
 - a. DO NOT delete household members. This will negatively impact data.
 - b. A pop-up will appear. Please refer to the picture below for next steps.

Add/Delete Household Members - (5) Couple With No Child(ren)

Household Members							
	Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
	(6) Client, Training		Yes	Self	11/08/2017	0	1
	(7) Alternate, Training		No	husband	11/08/2017	0	1

▼ Previous Household Members

This Household does not have any previous members.

Add Clients to the Household

Continue Cancel

- 4) Expand the “Add Clients to the Household” section by clicking the black arrow (circled above).
 - a. The screen will expand. Refer to the below picture for next steps.

▼ Add Clients to the Household

Client Search

Please Search the System before adding a New Client. [Hide Advanced Search](#)

Name	First Edward	Middle	Last	Suffix
Name Data Quality	-Select-			
Alias				
Social Security Number				
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	<input type="checkbox"/>			


Search Clear Add New Client With This Information

Client Number

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

Client ID # Submit

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
 11	Stoddard, Edward	849-51-9748	01/01/1987		Male		0

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Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
No matches.							

Continue Cancel

- 5) Enter the appropriate search information and click “Search”.
- 6) There are two ways to add a client to the household after the search is complete.
 - a. If the client was already in the system, they will appear under **Client Results**. Click on the green plus sign next to the client’s name (circled above).
 - b. If the client is NOT already in the system, click the “Add New Client With This Information” button.
- 7) For either of the above methods, the new household member’s name will appear under the **Selected Clients** section.
- 8) Continue adding clients as outlined in steps 5-7 until the household is complete. Click the “Continue” button.
- 9) Refer to step 2 in this section to update the **Household Type**, **Head of Household**, **Relationship to Head of Household**, and **Joined Household** fields.
- 10) Click “Save & Exit”.

If the Head of Household does NOT have an Established Household

- 1) After navigating to the **Households** tab, click on the “Start New Household” button.
 - a. A pop-up will appear. Please refer to the picture below for next steps.

Add New Household

Household Type

Household Type * -Select-

Client Search

Please Search the System before adding a New Client. Hide Advanced Search

Name First Middle Last Suffix
Name Data Quality -Select-
Alias
Social Security Number
Social Security Number Data Quality -Select-
U.S. Military Veteran? -Select-
Exact Match

Search Clear Add New Client With This Information

Client Number

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

Client ID # Submit

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
16	Training, Household					0

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Continue Cancel

- 2) Choose the “Household Type” from the drop down list (circled above).
- 3) Enter the appropriate search information and click “Search”.
- 4) There are two ways to add a client to the household after the search is complete.
 - a. If the client was already in the system, they will appear under **Client Results**. Click on the green plus sign next to the client’s name.
 - b. If the client is NOT already in the system, click the “Add New Client With This Information” button.
- 5) For either of the above methods, the new household member’s name will appear under the **Selected Clients** section.
- 6) Continue adding clients as outlined in steps 3-5 until the household is complete. Click the “Continue” button.
- 7) Update the following data fields.
 - a. **Household Type:** Ensure the correct household type is reflected in the associated dropdown.

- b. **Head of Household:** There may be only one (1) Head of Household. This is normally the person who qualifies for the project.
 - c. **Relationship to Head of Household:** Select the proper option for each household member. The Head of Household will be listed as 'self'.
- 8) Click "Save & Exit". You will be returned to the main **Households** tab.

Project Entry Creation and Universal Assessment Completion

This section will cover entering a client into HMIS. If you are working with a household, you will want to select the Head of Household for the following steps. Refer to the below picture for next steps.

Client Information | Service Transactions

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

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
No matches.						

Exit

- 1) From the client's record, click the "Entry/Exit" tab.
- 2) Click on the "Add Entry/Exit" button on left side of screen (circled above).
 - a. A pop-up will appear. Refer to the below picture for next steps.

Entry Data - (6) Client, Training

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) Couple With No Child(ren)

☒ (6) Client, Training

☐ (7) Alternate, Training

☐ (11) Stoddard, Edward

Entry Data - (6) Client, Training

Provider* Community Information & Referral (1935) Search My Provider Clear

Type* HUD

Entry Date* 11 / 15 / 2017 1 : 45 : 24 PM

Save & Continue Cancel

- 3) Using the **Household Members** area, only check mark the names of the clients who are entering your project. For singles, this area will be blank (arrowed above).
- 4) Ensure the "Provider" is correct. (If it is not correct then you are not in "Enter Data As" mode. Cancel entry command and get into EDA mode first.)
- 5) Choose the "Type" of **HUD**, **PATH**, **RHY** or **VA** as appropriate. "**HUD**" is the default selection if the others don't apply (circled above).

- 6) Ensure date is the actual entry date.
- 7) Click “Save & Continue” button.
 - a. A new pop-up will appear. The UDE Assessment (with program types listed in parenthesis) will display, as pictured below.

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.

Provider *

Center for Hope (Community Bridges) (14667)

Search My Provider Clear

Type *

HUD

Update

Household Members Associated with this Entry / Exit

	Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(6) Client, Training		11/15/2017						

Include Additional Household Members

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Entry Assessment

Select an Assessment

☒ Universal Entry Assessment

☒ Veteran TH Bridge Housing

☒ SELF SUFFICIENCY MATRIX ASSESSMENT

☒ Maricopa UDE Assessment

Household Members

☒ (6) Client, Training

Age: Unknown

Veteran: Unknown

Maricopa UDE Assessment

Entry Date: 11/15/2017 01:51:16 PM

Relationship to Head of Household *

-Select-

G

Date of Birth *

/ /

G

Date of Birth Type *

-Select-

G

Maricopa UDE (Universal Data Elements) Assessment Questions

The UDE Assessment will open by default for the Head of Household first. This assessment has HUD required questions, though some are optional. Below are the descriptions for each of the UDE questions.

- 1) **Relationship to Head of Household:** If you work with singles, then the answer to this is always “Self (head of household)”. Otherwise, select the most appropriate option from the dropdown.
 - a. The following projects have additional guidance. Please refer to the relevant addendum.
 - SSVF
 - RHY
- 2) **Date of Birth:** Enter the client’s reported date of birth using a 4 digit year. If the client cannot give you a date of birth, ask their age and approximate the date of birth year and use 01/01 for the month and day.
 - a. The following projects have additional guidance. Please refer to the relevant addendum.
 - SSVF
 - RHY
- 3) **Date of Birth Type:** Specify whether a full, partial, or other date of birth quality was provided. If a client does not know their date of birth to within one year, select “Client Doesn’t Know”.
- 4) **Primary Race:** Specify from the dropdown the primary race your client self-identifies as. If you hover over the question, you will see detailed information on which places of origin each race encompasses. In a situation the client does not select one of the 5 races, or a country or origin that indicates one of the 5 races, select “Client Doesn’t Know” or “Client Refused” as appropriate. Do not default to any one race.
- 5) **Secondary Race (Optional):** Specify from the dropdown the secondary race your client self-identifies as, if any. If they do not have a second race leave this question set at “Select”. DO NOT duplicate the primary race in this field for any reason.
- 6) **Ethnicity:** Specify the ethnicity of your client, either Hispanic/Latin(a)(o)(x) or Non-Hispanic/Latin(a)(o)(x). You may hover over the questions to see a list of countries that indicate a Hispanic/Latino ethnicity. If they identify this as their race, you may ask clarifying questions about where their ancestors were originally from. Refer to the “Primary Race” field for additional guidance.
- 7) **Gender:** Record the self-reported gender of each client served. Gender identity is a person’s internal perception of themselves and may not match the sex they were assigned at birth. Clients may select as many responses to the Gender field as they would like to, with up to a total of five options possible for a client's preferred identity, need or situation.
 - a. If they refuse to give it or say they don't know, do not make a selection other than “Client doesn’t know” or “Client refused” on the client’s behalf. Simply asking, “Which of these genders best describes how you identify?” is appropriate and focuses on the person's own internal knowledge of their gender.
 - b. If a client discloses being transgender, staff should ask if the client prefers to have the HMIS record reflect the client’s transgender status. For instance, if a client identifies as a transgender male but they do not want their transgender identity recorded in the HMIS, the staff person would select ‘Male’ instead of both 'Male' and 'Transgender.’

- 8) **Does the client have a disabling condition:** Please select the appropriate answer from the drop-down. There is additional information about HUD’s definition of disabling condition if you hover over the question.
- 9) **Did you experience an eviction from housing in the last 12 months?** “Yes” or “No” if client has been evicted in the past year.
- a. **Please choose the type of eviction you experienced:** Drop down box with three options select most appropriate reason “Non-Payment of Rent (COVID-19 Hardship)”, “Non-Payment of Rent (Non-COVID-19 Related)”, or “Other Issue (Non-Rent)”.
- 10) **Homelessness Primary Reason:** Select the primary reason your client is homeless.
- 11) **Residence Prior to Project Entry:** Specify the type of residence that most closely matches where your client slept LAST NIGHT or immediately prior to the project entry.
- 12) **Length of Stay in Previous Place:** This question relates to the question above, “Residence Prior to Project Entry”. You will record how long the client stayed at the prior residence from the dropdown options.
- a. **On the night before did you stay on the streets, ES or SH:** This question will only appear for some projects based on the answer to the question, “Length of Stay in Previous Place”. You will select either “Yes” or “No” from the dropdown. Depending on the answer, you may not see some of the following questions. If you do not, this is no need for concern.
- 13) **Approximate Date Homelessness Started:** This is the date the client most recently became homeless. This question is only asking for the most recent date of homelessness, not about prior history.
- 14) **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:** This field is asking you to count the number of times or instances of homelessness the client has experienced in the past three years. In other words, how many periods of homelessness did the client experience? Periods of homelessness will be separated by non-homeless living situations.
- 15) **Total number of months homeless on the Streets, in ES, or SH in the past three years:** Count the accumulated number of months the client was homeless in the past three years. If a client identifies one day as homeless in some month – and reports no other permanent living situation in that month – you may count it as one month of homelessness.
- 16) **Zip Code of Last Permanent Address:** Specify the 5 digit zip code of the last place the client was housed for at least 90 days. If the client cannot remember the exact zip code, then please hover over the question. You will see a list of default zip codes you may use for each city.
- 17) **Client Location:** This field identifies a HUD defined geographic region. Select the option from the dropdown.
- 18) **Housing Move-in Date (PH and RRH Projects ONLY):** This field is only displayed on the UDE Assessment with “(PSH, RRH, TH, SSO, and HP)” in its name. This field marks the day a client moved into an actual housing

unit. This field applies to all Permanent Housing, including Rapid Re-Housing, projects. Transitional Housing, Supportive Services Only and Homelessness prevention projects do not need to complete this field. If there is already data in this field, please follow one of the two scenarios below.

- a. If the client is being housed immediately: Update this field to record the date they are moving into housing.
- b. If the client will **NOT** be housed immediately: Leave the field with the previous recorded date. This is used for reporting. When the client does move into housing, you must then update this field with the client's move-in date. This can be accomplished with an update. Refer to the **Interim Update** section for more guidance.

After completing the UDE Assessment, click “Save” on the bottom right. If you do not have additional household members **AND** you do not complete additional assessments, you may click “Save & Exit”. Please refer to your agency for guidance in this regard. In most cases you will want to review the **Program Data Elements** section below.

Completing UDE for Other Household Members

If you are serving a household, you will need to complete the UDE Assessment for additional household members. If you are serving a single, you may disregard this section.

- 1) Scroll up to the **Household Members** section (circled below). You will notice a green check mark next to each client you have already entered data for. Click on a client with a gray check mark to complete their data.
 - a. Please note the **UDE Assessment** has a yellow check (square below). This means additional household members still need to have their assessment completed.

- 2) The UDE Assessment will now open for the next client. Answer the questions as described in the previous section. Move on to the next step once you have entered data for all clients in the household.
- 3) Once everyone's data is complete the check marks by their names will turn green.
- 4) After completing the UDE Assessment for every household member, click “Save” on the bottom right. If you do not have additional household members **AND** you do not complete Program Data Elements, you may click “Save & Exit”. Please refer to your agency for guidance in this regard. In most cases you will want to review the Program Data Elements below.
- 5) If you need to complete the Program Data Elements, please switch back to the Head of Household's record before proceeding.

Program Data Elements Questions: Clients Not Served Previously

Scroll back to top of page and click on the **Entry Assessment** in the **Select an Assessment** section. This assessment may have various names depending on your program type, but should typically still say “Entry Assessment” within the title. Additional questions will now appear on this second assessment. Please complete these questions.

- 1) **Total Monthly Income:** This is a text field used to enter the client’s total monthly income. This will be a total of all the incomes the client identifies.
 - a. The following project has additional guidance. Please refer to the relevant addendum.
 - SSVF
- 2) **Income from Any Source:** Choose “Yes” or “No” whether the client is currently receiving any form of income at entry into your project.
- 3) **“Monthly Income” Sub-Assessment:** Click on the “HUD Verification” link to the right of this question. You will need to answer “Yes” or “No” to every source of income on the list. If the answer is “Yes” to any you will see a new pop-up for you to complete.
 - a. Enter the income amount
 - b. The **Start Date** will equal the day the client discloses to you their income and should match their entry date.
 - c. The **End Date** should be left blank
 - d. Click Save & Exit. The HUD Verification link should have a green checkmark to let you know that this is fully completed.
- 4) **Non-Cash Benefit from Any Source:** Choose Yes or No whether the client is currently receiving any form of Non-Cash Benefit at entry into your project.
- 5) **“Non-Cash Benefits” Sub-Assessment:** Use the “HUD Verification” link on the right. Answer Yes or No to *every* source of benefit on the list. Click Save & Exit. HUD Verification link should have a green checkmark now.
- 6) **Covered by Health Insurance:** Choose Yes or No, whether the client currently has any form of Health Insurance at entry into your project.
 - a. **Note:** The following programs should refer to their addendum packets for additional guidance.
 - HOPWA
- 7) **“Health Insurance” Sub-Assessment:** Use the “HUD Verification” link on the right. Answer Yes or No to *every* source of health insurance on the list. Click Save & Exit. HUD Verification link should have a green checkmark now.

a. **Note:** The following programs should refer to their addendum packets for additional guidance.

☐ **HOPWA**

- 8) **“Disabilities” Sub-Assessment:** Use the “HUD Verification” link on the right. Answer Yes or No to *every* type of disability on the list. If the answer is Yes to any, fill in the additional question about the assessment that pops-up. Click Save & Exit. HUD Verification link should have a green checkmark now.

a. **Note:** The following programs should refer to their addendum packets for additional guidance.

☐ **SSVF**

- 9) **Highest Level of Education Attained:** Choose from the drop down list the highest level of education the client has attained.

- 10) **Domestic Violence victim/survivor:** Answer Yes or No on whether the client has ever been, or is currently, a victim of domestic violence.

a. **Note:** The following program does not require this question.

☐ **SSVF**

- 11) **If yes for Domestic violence victim/survivor, when experience occurred:** Indicate how long ago the most recent incident of domestic violence occurred.

- 12) **If yes for Domestic violence victim/survivor, are you currently fleeing?:** Indicate if the client is currently fleeing a domestic violence situation.

- 13) **Additional Program Guidelines:** Depending on your grant source and funding, you may have to complete additional program elements.

a. **Note:** The following programs should refer to their addendum for additional program elements.

☐ **HOPWA**

☐ **SSVF**

☐ **RHY**

☐ **ESG**

☐ **PATH**

After completing the Program Data Elements, click “Save” on the bottom right. If you do not have additional household members, and you have no custom assessments to complete, you may click “Save & Exit”. Otherwise, continue to the Completing Program Elements for Other Household Members (if applicable) section that outlines how to complete these assessments for the remaining household members.

Program Data Elements Assessment: Clients Served Previously

Clients that have been served by an agency in the past and agreed to share their information may have historical information that pre-populates. The following outlines how to update any of these fields if they any of the selections and values are not current.

- 1) To verify a previously served clients information click on the associated HUD Verification link

Total Monthly Income	<input type="text" value="900"/>	G
Income from Any Source	<input type="text" value="Yes (HUD)"/>	G

Monthly Income
HUD Verification

	Source of Income	* Monthly Amount	* Start Date (required)	* End Date (optional)	Receiving Income Source?
	Child Support (HUD)		10/07/2020		No

- 2) Confirm client is still receiving or not receiving associated income, non-cash benefits, or insurance
 - i. If any change in values click the pencil icon next to the associated source

HUD Verification: Monthly Income for 10/09/2020

Per Source of Income, the current records for Monthly Income as of 10/09/2020 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 10/09/2020, records containing "Yes" values will be displayed and take precedence for reporting purposes.

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 checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
General Assistance (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"/>

- 3) A Edit Record Set Pop-Up will appear update the pop-up accordingly
 - i. End Date – must be updated to one day before the date of the reported change
 - ii. DO NOT UPDATE any other fields for the change

Edit Recordset - (47404) Testerson, Test R.

Monthly Income

Source of Income	Earned Income (HUD)
Monthly Amount *	250 G
If Other, Please Specify	<div></div> G
Start Date (required) *	10 / 02 / 2020 23 23 G
End Date (optional)	<div></div> 23 23 G
Receiving Income Source?	Yes G

Complete End Date to update when the client is no longer receiving this income source a□□

Print Recordset Save Cancel

- 4) The HUD Verification screen will have changed to incomplete
- Update associated field to No to reflect the client no longer receiving income, non-cash benefits, or insurance

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 type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

** For changing a client who is not receiving income, non-cash benefits, insurance to receiving or updating amount of the same source. Please see the Interim Update sections associated with the value you are changing. **

Completing Program Elements for Other Household Members (if applicable)

If you are serving a household, you will need to complete the Program Data Elements for additional household members. If you are serving a single individual, you may disregard this section.

- 1) Scroll up to the **Household Members** section (circled below). You will notice a green check mark next to each client you have already entered data for. Click on a client with a gray check mark to complete their data.
 - a. Please note the **Entry Assessment** has a yellow check. This means additional household members still need to have this assessment completed.

The screenshot shows the 'Entry Assessment' form. At the top, there are two buttons: 'Maricopa UDE Assessment' (with a green checkmark) and 'Universal Entry Assessment' (with a yellow checkmark). Below these, the 'Household Members' section is circled in red. It contains two entries: the first has a green checkmark, 'Age: 37', and 'Veteran: No (HUD)'; the second has a gray checkmark, 'Age: 37', and 'Veteran: Unknown'. To the right, the 'Universal Entry Assessment' section shows the 'Entry Date: 11/27/2017 04:13:49 PM' and a 'Universal Data Elements' section with a dropdown menu for 'Relationship to Head of Household' set to 'Head of household's spouse or partner'.

- 2) The **Entry Assessment** will now open for that client. Answer the questions as described in the previous section.
- 3) Click “Save”. Select each additional household member until complete. Once all household members have been updated, move on to the next step.
 - a. Once everyone’s data is complete the check marks by their names will turn green.
- 4) After completing the Entry Assessment for every household member, click “Save” on the bottom right. If you have an agency specific assessment, you would complete it at this time. Please refer to your agency for guidance in this regard. If you do not have any custom assessments to complete, you may click “Save & Exit”.

How to do an Interim Update

This section will cover updating a client's record in HMIS. If you are working with a household, you will want to select the Head of Household for the following steps. Refer to the below picture for next steps.

The screenshot shows the 'Client Information' window with the 'Entry / Exit' tab selected. A reminder message states: 'Reminder: Household members must be established on Households tab before creating Entry / Exits'. Below this, a table lists entry/exit records. The first record is for 'Community Information & Referral (1935)' with type 'HUD' and entry date '12/04/2017'. The 'Interims' column for this record contains an icon circled in red. Other icons for 'Follow Ups' and 'Client Count' are also visible. An 'Add Entry / Exit' button is at the bottom left, and an 'Exit' button is at the bottom right.

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
Community Information & Referral (1935)	HUD	12/04/2017				

- 1) Click on the “Entry / Exit” tab.
- 2) Find your project’s line of entry and click on the “Interims” icon (circled above).
 - a. A pop-up will appear. Refer to the below picture for next steps.

The screenshot shows the 'Interim Reviews' pop-up window. It has a title bar with a close button. The main content area is titled 'Interim Reviews Associated with this Entry / Exit'. Below this is a table with columns 'Review Date', 'Review Type', and 'Client Count'. The table is empty, and the text 'No matches.' is displayed. A red circle highlights the 'Add Interim Review' button on the left. An 'Exit' button is at the bottom right.

Review Date	Review Type	Client Count
No matches.		

- 3) Click the “Add Interim Review” button on the pop up window (circled above).
 - a. A new pop-up will appear. Refer to the below picture for next steps.

The screenshot shows the 'Interim Review Data' form. It contains several fields: 'Entry / Exit Provider' (Community Information & Referral (1935)), 'Entry / Exit Type' (HUD), 'Interim Review Type *' (a dropdown menu with '-Select-' selected, circled in red), and 'Review Date *' (12 / 04 / 2017). There are also time selection fields (3 : 53 : 13 PM) and a 'Save & Continue' button. A 'Cancel' button is at the bottom right.

Entry / Exit Provider	Community Information & Referral (1935)
Entry / Exit Type	HUD
Interim Review Type *	-Select-
Review Date *	12 / 04 / 2017

- 4) Select the “Interim Review Type” from the drop down list (circled above).
 - a. **Annual Assessment:** A mandatory interim update required for long term projects. This must be recorded on each client’s record within a 60 day window of the client’s project anniversary (plus or minus 30 days of anniversary date), even if there is no change in client’s status. The head of household’s anniversary will apply to the entire household.
 - b. **Update:** This is used for any update not for the annual assessment. Please refer to your agency regarding requirements for completing regular updates.
- 5) Ensure the “Review Date” is correct. This date should reflect the date you were informed of the change, not the actual date a change in status occurred.
- 6) Click “Save & Continue”.
- 7) The appropriate update assessment will automatically populate, as pictured below.

Interim Review Assessment

Select an Assessment

☒ Maricopa UDE Assessment

☒ Universal Entry Assessment

☒ Universal Update Assessment

Household Members

☒ (1) Training, HMIS
Age: 37
Veteran: No (HUD)

☒ (2) Update, HMIS
Age: 37
Veteran: Unknown

Universal Update Assessment Interim Review Date: 12/04/2017 04:40:25 PM

Total Monthly Income 500

Income from Any Source Yes (HUD)

Monthly Income

HUD Verification

Making Adjustments to Income

The next two sections cover how to adjust income. Please remember that every income change will create one additional row under the **Monthly Income** section.

- 1) Change the text field “Total Monthly Income” from a zero to the new monthly amount (pictured above).
- 2) Change the “Income from any Source” question from a ‘No’ to a ‘Yes’ (pictured above).
- 3) Next, click the blue HUD Verification Link (pictured above).
 1. A pop-up will appear. Refer to below picture for next steps.

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 checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
General Assistance (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"/>
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 Non-Service Connected Disability Pension (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"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

- 4) Click the Pencil Icon next to the Income Source that is being updated. (Pictured Above)
 1. A pop-up will appear. Refer to below picture for next steps.

Edit Recordset - (1) Training, HMIS

Monthly Income

Source of Income * Earned Income (HUD) G

Monthly Amount * 0 G

In Other, Please Specify

Start Date (required) * 11 / 27 / 2017 G

End Date (optional) 01 / 01 / 2018 G

Receiving Income Source? No G

Complete End Date to update when the client is no longer receiving this income source a□□

Print Recordset Save Cancel

- 5) a) If the previous answer was “no” for earned income, put a zero in the “Monthly Amount” section (circled above).
- b) If the previous answer was “yes” and there was a recorded income amount, DO NOT CHANGE the amount. Leave it as is and refer to the next steps below.
- 6) Enter an “End Date”. This should reflect the *day before* the new income was reported to you (arrowed above).
- 7) Click the “Save” button.
 1. The pop-up will close. You will now see the previous pop-up window. Please refer to the picture below for next steps.

Interim Review Assessment

HUD Verification: Monthly Income for 09/30/2020

Per Source of Income, the current records for Monthly Income as of 09/30/2020 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 09/30/2020, 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 type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
General Assistance (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"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

- 8) Please note that the circled **Earned Income** row now shows as incomplete prompting us to update the information. Selecting Yes will open a new Edit Record set Pop-Up (pictured below)

Edit Recordset - (1) Training, HMIS

Monthly Income

Source of Income * **1**

Monthly Amount * **2**

If Other, Please Specify

Start Date (required) * / / **3**

End Date (optional) / /

Receiving Income Source? **4**

Complete End Date to update when the client is no longer receiving this income source ☐

9) Complete the following fields:

- Source of Income:** This should be the same as the previous income. In this example, it will be earned income.
- Monthly Amount:** This is the new dollar amount the client is making.
- Start Date:** This should be the date the client reported the information to you not necessarily when they started receiving this income source
- Receiving Income Source:** This will be a “Yes” as the client is making some amount of money.

10) Click “Save”. You will now see two rows of the income type, which means the update was done correctly. One will have an end date, and the other should not have an end date. This is pictured below.

Show All Monthly Income Records

Monthly Income

	Provider	Date Effective	Source of Income	Monthly Amount ▲	Start Date (required)	End Date (optional)	Receiving Income Source?
	Community Information & Referral (1935)	11/27/2017 4:13:49 PM	Earned Income (HUD)	US\$0.00	11/27/2017	01/01/2018	No
	Community Information & Referral (1935)	12/04/2017 4:40:25 PM	Earned Income (HUD)	US\$500.00	01/02/2018		Yes
	Community Information & Referral (1935)	11/27/2017 4:13:49 PM	Other (HUD)		11/27/2017		No

Key notes for Updating Income

- Never Update previously entered information. Instead add an end date and enter new information to make updates.

2. Start Date is the day new income was reported to you this may not reflect the day the client started receiving that income.
3. When updating the End Date should be the day before new income was reported to you.
4. Always check the HUD Verification Field ensure that after updating there is still a Green Check this indicates a completed field and updates were completed successfully.

Making Adjustments to NON-CASH BENEFITS or HEALTH INSURANCE

The next sections will cover how to record updates to non-cash benefits and health insurance.

Non-Cash Benefits			
Source of Non-Cash Benefit	Start Date (required)	End Date (Optional)	Receiving Benefit?
Other Source (HUD)	10/07/2020		No
Other TANF-Funded Services (HUD)	10/07/2020		No

To change a previously recorded NON-CASH BENEFIT or HEALTH INSURANCE record:

- 1) Ensure the “Non-cash benefit from any source” OR “Covered by health insurance” field reflects a ‘No’ or a ‘Yes’ (pictured above) that will match the information in the HUD verification.
- 2) Next, click the HUD Verification Link next to the **Non-Cash Benefits** OR **Health Insurance** sub-assessment header (pictured above).
 - a. A pop-up will appear. Refer to below picture for next steps.

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"/>

- 3) Find the non-cash benefit or health insurance type that is changing. In this example, **Food Stamps** is being used. Click the pencil on the left side of the row (circled above).
 - a. A pop-up will appear. Refer to the picture below for next steps.

Edit Recordset - (1) Training, HMIS

Non-Cash Benefits

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

If Other, Please Specify

Start Date (required) * 11 / 27 / 2017 G

End Date (Optional) 01 / 01 / 2018 G

Receiving Benefit? No G

Print Recordset Save Cancel

- 4) Enter an “End Date”. This should reflect the *day before* the new benefit was reported to you (arrowed above).
- 5) Click the “Save” button.
 - a. The pop-up will close. You will now see the previous pop-up window. Please refer to the picture below for next steps.

HUD Verification: Non-Cash Benefits for 10/14/2020

Per Source of Non-Cash Benefit, the current records for Non-Cash Benefits as of 10/14/2020 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 10/14/2020, 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

☐ Yes
☐ No
☐ Data Not Collected
☒ Incomplete

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 checked="" type="radio"/>
Special Supplemental Nutrition Program for WIC (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF Child Care Services (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF Transportation Services (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other TANF-Funded Services (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other Source (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save Save & Exit Exit

- 6) Please note that your **Food Stamps** row looks different it is showing as the circled incomplete.
- 7) Click the “Yes” or “no” button as appropriate. If you select the “yes” button to add in the new benefit (arrowed above) you will see the following pop-up.
 - a. Click Pencil Icon of associated benefit to verify information. (Pictured Below)

Add Recordset

Non-Cash Benefits

Source of Non-Cash Benefit * Supplemental Nutrition Assistance Program (Food Stamps) (HUD) **1**

If Other, Please Specify

Start Date (required) * 01 / 02 / 2018 **2**

End Date (Optional) / /

Receiving Benefit? Yes **3**

Save Cancel

- 8) Complete the following fields:
- Source of Non-Cash Benefit OR Health Insurance:** This should be the same as the previous benefit. In this example, it will be Food Stamps.
 - Start Date:** This must be one day after the previous benefit ended.
 - Receiving Benefit:** This will be a “Yes” as the client is now receiving the benefit.
- 9) Click “Save”. You will now see two rows of the benefit type (noted with 1 and 2 below), which means the update was done correctly and a Green Check next HUD Verification noting the field is completed. (Circled Below)

Non-cash benefit from any source Yes (HUD) **1**

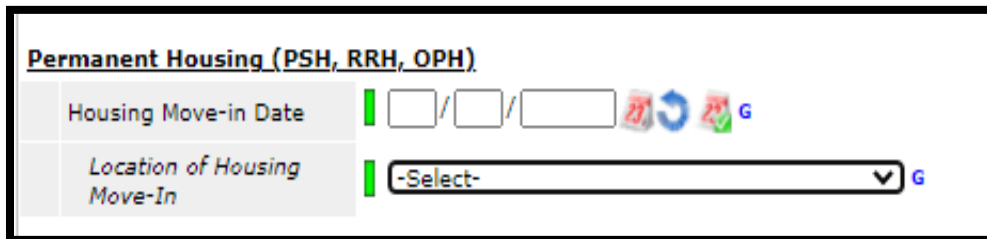
Non-Cash Benefits **HUD Verification** **2**

	Source of Non-Cash Benefit *	Start Date (required)	End Date (Optional)	Receiving Benefit?
1	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	10/14/2020		Yes
	TANF Child Care Services (HUD)	10/14/2020		No
	TANF Transportation Services (HUD)	10/14/2020		No
	Special Supplemental Nutrition Program for WIC (HUD)	10/14/2020		No
2	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	10/12/2020	10/13/2020	Yes





Recording a Housing Move-In Date

The following section includes instructions for recording the date a client is able to move into housing and is relevant to housing programs only. This includes Rapid Re-Housing, Permanent Supportive Housing, Permanent Housing, and Other Permanent Housing. If there is a date recorded in this field, please update it to the date the client moved into housing.

- 1) Navigate to the UDE Assessment
- 2) Find the section pictured below



Permanent Housing (PSH, RRH, OPH)

Housing Move-in Date	<input type="text" value=""/> /	  
Location of Housing Move-In	<input type="text" value="-Select-"/>	

- 3) Record the date the client moved into housing.
- 4) Use the drop-down “Location of Housing Move-In” to record the city or county the client was housed in.

Exiting your family from your project/grant


This section will cover exiting a client from your project in HMIS. If you are working with a household, you will want to select the Head of Household for the following steps. Refer to the below picture for next steps

- 1) From the client’s record click on the “Entry/Exit” tab for your project.
- 2) Find the appropriate line of entry into your project on the “Entry/Exit” preview pane.



Client Information | Service Transactions

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

 Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
 Community Information & Referral (1935)	HUD	 11/27/2017				 

Showing 1-1 of 1

- 3) Locate the blank **Exit Date** column and click the pencil icon to the left to exit your household (circled above).
 - a. A pop-up will appear. Please refer to the below picture for next steps.

Edit Exit Data - (970863) Client, Training

Household Members

To update Household members for this Exit Data, click the box beside each name.

☒ (31278) Couple (Parent & Friend) and Child(ren) (HUD)

☒ (970864) Client, HMIS

☒ (970863) Client, Training

Edit Exit Data - (970863) Client, Training

Exit Date *	12 / 04 / 2017 1 : 39 : 41 PM
Reason for Leaving	Completed program
If "Other", Specify	
Destination *	Rental by client, with other ongoing housing subsidy (HUD)
If "Other", Specify	
Notes	

- 4) Under the Household Members section, checkmark every family member's name that is leaving with the Head of Household (arrowed above).
 - a. Please do not leave children in the project without an adult.
 - b. Sometimes a single family member will exit the project while the rest of the family stays. In this case you should locate the HMIS record of the person who is leaving only and create the exit from their record, and only include them in the exit.
 - a. If the Head of Household is the exiting family member, you will need to re-designate the Head of Household both on the "Households" tab and within the **UDE Assessment** on the "Entry/Exit" tab.
- 5) Ensure "Exit Date" is actual date family is leaving your project.
- 6) Select the appropriate "Reason for Leaving" from the dropdown list (circled above).
- 7) Complete "Destination" from the dropdown list (square above).

- 8) Click the “Save & Continue” button at bottom right side of the screen.
 - a. A new pop-up will appear. Refer to below picture for next steps.

Select an Assessment

☒ Maricopa UDE Assessment ☒ Universal Entry Assessment ☒ Universal Exit Assessment

Household Members

(1) Training, HMIS
Age: 37
Veteran: No (HUD)

(2) Update, HMIS
Age: 37
Veteran: Unknown

Universal Exit Assessment Exit Date: 12/04/2017 04:31:46 PM

Total Monthly Income 500 G

Income from Any Source Yes (HUD) G

Monthly Income HUD Verification ☒

- 9) The **Exit Assessment** will default. The **Exit Assessment** is provided in case you need to make any last updates before the family exits. For more detail on how to perform updates, refer to the **How to do an Interim Update** section.
 - a. Do NOT end income, benefits, or disabilities just because your client is leaving. Only end income, benefits, or disabilities if the client truly does not receive them anymore.
 - b. Ensure that you complete the exit assessment for every member of the household.
- 10) Depending on your grant source and funding, you may have to complete additional program elements.
 - a. **Note: The following programs should refer to their addendum for additional program elements.**
 - **SSVF**
 - **RHY**
 - **ESG**
- 11) Click the “Save & Exit” button to finish and exit the client or household.
- 12) You will be directed back to the “Entry / Exit” preview pane. Locate the appropriate line for your project exit and ensure exit date is correct.

Household Management

How to add an additional member to an existing household

- 1) Find the Head of Household (primary client) for your family group and click on the Households tab.

Households

- c. **Note:** Do not ever remove a household member from an existing household unless that person has died. Neither should you create another household when the household composition changes. You are able to exclude old household members from project entries if needed, or add new members to it as needed. If you have an unusual circumstance, or the client already has multiple households, please contact the HMIS helpdesk for assistance on how to proceed.
- 2) Click on the “Manage Household” button under the existing household.
 - 3) Click on the “Add/Delete Household Members” button.

Household Members							
	Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
	(266) Swank, Hilary	29	Yes	Self	02 / 01 / 2014	0	1
	(459) Swank, Baby		No	daughter	05 / 23 / 2014	0	1
	(82) Wayne, John	81	No	husband	02 / 01 / 2014	0	1
Add/Delete Household Members						Household History Report	

- 1) Expand the Add Clients to the Household section by clicking black arrow in order to view client search screen.

Add Clients to the Household

- 2) Search for new household member either by name, or client ID number.
 - d. **Note:** If you believe this client may be new to the system (for instance, a small child) be sure to fill in all data you can gather on the search screen because you will be creating a new client record right now.
- 3) If the client was already in the system, then choose them from the “client results” area by clicking green plus sign OR if the client is NOT already in the system, click the “Add New Client With This Information” button.
- 4) For either outcome, the new household member’s name should end up at the bottom of the screen under the “Selected Clients” section. Click the “Continue” button.

Selected Clients							
ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	1825 Swank, Susan						0
Showing 1-1 of 1							
						Continue	Cancel

- 5) Find the new client on the household members list and designate their relationship to the Head of Household.
- 6) Correct the date the client “Joined” the Household, if it isn’t the current date.

7) Click Save & Exit at bottom of screen.

Household Members							
Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count	
(266) Swank, Hilary	29	Yes	Self	02 / 01 / 2014	0	1	
(459) Swank, Baby		No	daughter	05 / 23 / 2014	0	1	
(1825) Swank, Susan		No	-Select-	02 / 22 / 2015	0	1	
(82) Wayne, John	81	No	-Select-	02 / 01 / 2014	0	1	

Add/Delete Household Members

Household History Report

Previous Household Members

aunt
brother
cousin
daughter
daughter-in-law
father
father-in-law
foster daughter

How to add the new household member to the household's entry into your project

Entry / Exit

- From the Head of Household's client record, click the Entry/Exit tab.
- Find the line of entry into your project and edit the entry by clicking the Edit Entry pencil icon.

Note there is a button on this first pop up window that says "Include Additional Household Members"...DO NOT use this button.

- Click "Save & Continue" button.
- Find the "Household Members Associated with this Entry/Exit" section, underneath everyone's name, and NOW click the button "Include Additional Household Members".

Household Members Associated with this Entry / Exit									
	Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(266) Swank, Hilary	Yes	02/01/2015						
	(459) Swank, Baby	No	02/01/2015						
	(82) Wayne, John	No	02/01/2015						

Include Additional Household Members

Showing 1-3 of 3

- Find the new client in the family group and check mark their name.
- Go to "Entry Date*" and CHANGE the date to the actual date this new household member joined the family group. (It defaults to the HoH's entry date, do not use that date!)
- Click "Save & Continue" button.

Edit Entry Data - (266) Swank, Hilary

Household Members

To include additional Household Members, click the box beside each name. Only Members from ONE Household may be selected at a time.

☐ (53) Extended Family Unit (HUD)

☒ (266) Swank, Hilary (Entry Date: 02/01/2015 12:00 PM)

☒ (459) Swank, Baby (Entry Date: 02/01/2015 12:00 PM)

☐ (1825) Swank, Susan

☒ (82) Wayne, John (Entry Date: 02/01/2015 12:00 PM)

Edit Entry Data - (266) Swank, Hilary

Provider: Gilbert Grant NEW (Save the Family) (14706)

Type: HUD

Entry Date * 02 / 01 / 2015 12 : 00 : 00 PM

Save & Continue Cancel

- Ensure new household member's date of entry is correct (different from the other members).
- From the Head of Household's assessment screen, scroll down to the linear listing of the Household Members on the left side of screen.
- Select the new household member from this list by clicking on their name.

Household Members

☒ (266) Swank, Hilary
Age: 29
Veteran: Yes (HUD)

☒ (459) Swank, Baby
Age: Unknown
Veteran: Unknown

☒ (1825) Swank, Susan

☒ (82) Wayne, John
Age: 81
Veteran: Yes (HUD)

- Complete this new household member's Maricopa UDE Assessment, and then the Universal Entry Assessment, and any other custom assessments if applicable to your project/grant. *These assessments should be completed per the instructions you received in HMIS 101b OR HMIS 102b.*

- Click “Save & Exit” button when the new family member’s assessment data entry is complete. You will be returned to the Head of Household’s Entry/Exit preview pane.
- Click on the “Client Count” icon to verify new household member is added to the family group’s entry with the correct date.

Client - (266) Swank, Hilary

Entry / Exit Client Count

Client	Entry Date	Exit Date
(459) Swank, Baby	02/01/2015	
(266) Swank, Hilary	02/01/2015	
(1825) Swank, Susan	02/22/2015	
(82) Wayne, John	02/01/2015	

Showing 1-4 of 4

Exit

Showing 1-1 of 1

How to make corrections to data entry errors in HMIS

Note: You will usually be opening up an existing entry/interim/exit when doing corrections, so you do not need to be in back date mode. However, more complicated corrections may require entry/exits to be deleted and re-created and in those cases you should use back date mode.

- Please use the following instructions for errors to basic answer fields on either the “Maricopa UDE Assessment” or the various universal assessments such as the “Universal Entry Assessment”, “Universal Update Assessment”, or “Universal Exit Assessment”.
- Before starting, determine which area of the client record needs corrected, the entry answer(s), an interim update answer(s), or an exit answer(s)...and then use the appropriate edit tools to make your corrections in the right place (usually where the question was originally answered).

For example, to correct an answer at the client’s entry, such as Date of Birth

- 8) Enter Data As to the appropriate project/grant, if applicable.
- 9) Find your client.
- 10) Click on the “Entry/ Exit” tab (*DO NOT ever use the Assessment Tab to correct records*).
- 11) On the Entry/Exit tab find the current line of entry into your project, click on the Edit Entry pencil icon to the left of the entry date.

Entry / Exit						
Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
Arizona Dept. of Housing (1)	HUD	07/21/2014				
Add Entry / Exit						
Showing 1-1 of 1						

- The Entry/Exit window will pop up, click “Save & Continue” button.
- The Maricopa UDE Assessment will default open and this is the assessment you should use to make the correction since this was where the answer (Date of Birth) was originally recorded.
- Find the answer that needs corrected (Date of Birth) and change it to the correct answer.

Date of Birth * 08 / 30 / 1985

TO

Date of Birth * 08 / 03 / 1985

- Scroll to bottom of assessment and click “Save” button (*NOT Save & Exit, you are not done yet*).



Save Save & Exit Exit

Note: You may have noticed in the past, that when you complete an assessment and save it, you will either see Answer Age Color Bars appear, or they will change color, to the left of the question field answers. The darker the color the older the answers are. However, this Answer Age Color Bar is also how we access the “History” of this answer.

- Determine if the error was made by your project at this current entry, or if the error was made by a prior entry or prior service provider. Follow the steps below to determine this and complete the correction right.
- Click on the Answer Age Color Bar next to the answer you just corrected.

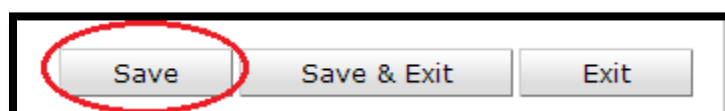
Date of Birth * 08 / 03 / 1985

- The History pop up window will open, please review the information to determine your next step.
 - If the wrong answer was entered by a *different provider and/or on a prior date*, it is not necessary to delete the wrong answer because your newer saved answer supersedes it. Just close the History window by clicking the black X.



History - Date of Birth				
Date Effective	User Adding	Provider Adding	Value	
02/01/2015 12:00:00 PM	Tricia Cano	Gilbert Grant NEW (Save the Family)	08/03/1985	
06/09/2014 1:46:47 PM	Shantae Smith	Siemer Family Stability Program (HFIN)	08/30/1985	

Showing 1-2 of 2

- Scroll to bottom of assessment and click “Save & Exit” button to complete correction and exit the entry assessment.

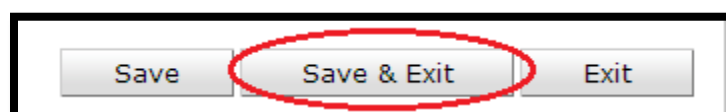


- If the wrong answer *was entered by your project on the current entry date*, then you have to get rid of the incorrect answer. You can verify this by looking at the “Date Effective” of both answers. If the date and time stamp are exactly the same, then the error was created by your project.
- In this case, you MUST delete the wrong answer. Do this by clicking the “Trash Can” icon next to the wrong answer.

History - Date of Birth				
Date Effective	User Adding	Provider Adding	Value	
01/27/2015 10:43:33 AM	Tricia Cano	Welcome Center (HSC)	01/01/1985	
01/27/2015 10:43:33 AM	Tricia Cano	Welcome Center (HSC)	01/01/1975	

Showing 1-2 of 2

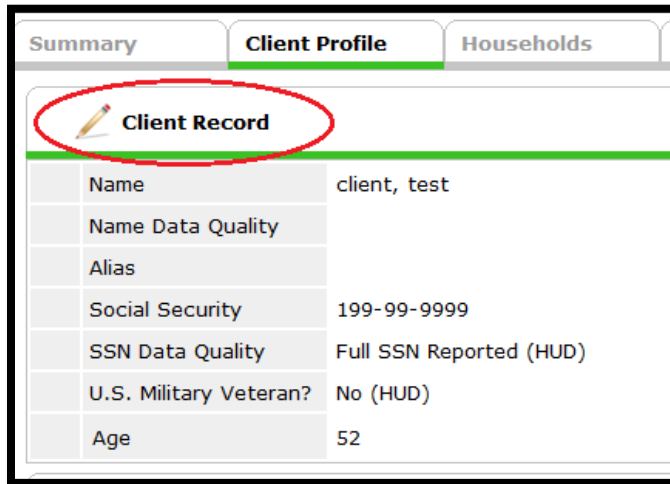
- You will be asked to verify you want to delete this item, click “Delete” button.
- Close the History window by clicking the black X.
- Scroll to bottom of assessment and click “Save & Exit” button to complete correction and exit the entry assessment.



Note: If you have a more complicated error to fix, please contact the HMIS Helpdesk for assistance.

How to correct mistakes, or missing data, on the Client Profile page

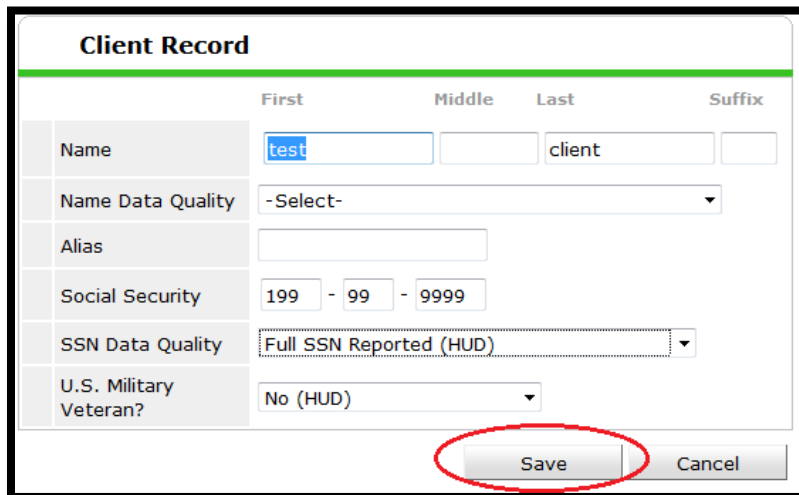
- The directions below show how to fix the following items on the client record:
 - Name / Name spelling / Alias / Name Data Quality
 - Social Security number / SSN Data Quality
 - U.S. Military Veteran status
- Find your client and ensure you are on the “Client Profile” tab.
- Click the “Edit Client Record” pencil icon next to the Client Record header.



The screenshot shows the 'Client Profile' tab selected. Under the 'Client Record' header, which has a pencil icon next to it circled in red, there is a table of client information.

Name	client, test
Name Data Quality	
Alias	
Social Security	199-99-9999
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	No (HUD)
Age	52

- The client record edit screen will open, make appropriate corrections, Click “Save” button.



The screenshot shows the 'Client Record' edit screen. It contains form fields for Name (split into First, Middle, Last, and Suffix), Name Data Quality, Alias, Social Security, SSN Data Quality, and U.S. Military Veteran?. The 'Save' button at the bottom is circled in red.

	First	Middle	Last	Suffix
Name	<input type="text" value="test"/>	<input type="text"/>	<input type="text" value="client"/>	<input type="text"/>
Name Data Quality	<input type="text" value="-Select-"/>			
Alias	<input type="text"/>			
Social Security	<input type="text" value="199"/>	<input type="text" value="- 99"/>	<input type="text" value="- 9999"/>	
SSN Data Quality	<input type="text" value="Full SSN Reported (HUD)"/>			
U.S. Military Veteran?	<input type="text" value="No (HUD)"/>			

Helpdesk Contact Information:

Submit a Ticket:

<https://community.solari-inc.org/submit-a-ticket/>

Phone: 602-908-3605