



**Get Connected. Get Help.™**

# Welcome!

October 2024  
HMIS Part 2 Training

JOURNEY 100 TO



# Agenda

1. Introductions and Policies
2. Searching and Creating a Client Profile
3. Creating and Managing Household Members
4. Enrolling Clients Into a Project
5. Services and Updates
6. Exiting a Client from a Project
7. HMIS Program Roster Report

Training materials and recording will be available on the [OC HMIS website](#).



# Introductions and Policies



# What is HMIS Part 2 Training?

HMIS Part 2 covers the data entry process  
and functionality of Clarity

# HMIS Policy and Privacy Forms

In order for client records to be shared in HMIS, clients must consent to share their data with other agencies participating in HMIS.

The following forms are to be shared during intake and made accessible to clients:

- Consent to Share Protected Personal Information
- Grievance Form
- Client Revocation of Consent Form

Forms to be posted at each intake location:

- Note Regarding Collection of Personal Information
- Privacy Notice

<https://ochmis.org/privacy-forms/>



Graphic by: <https://storyset.com/online>

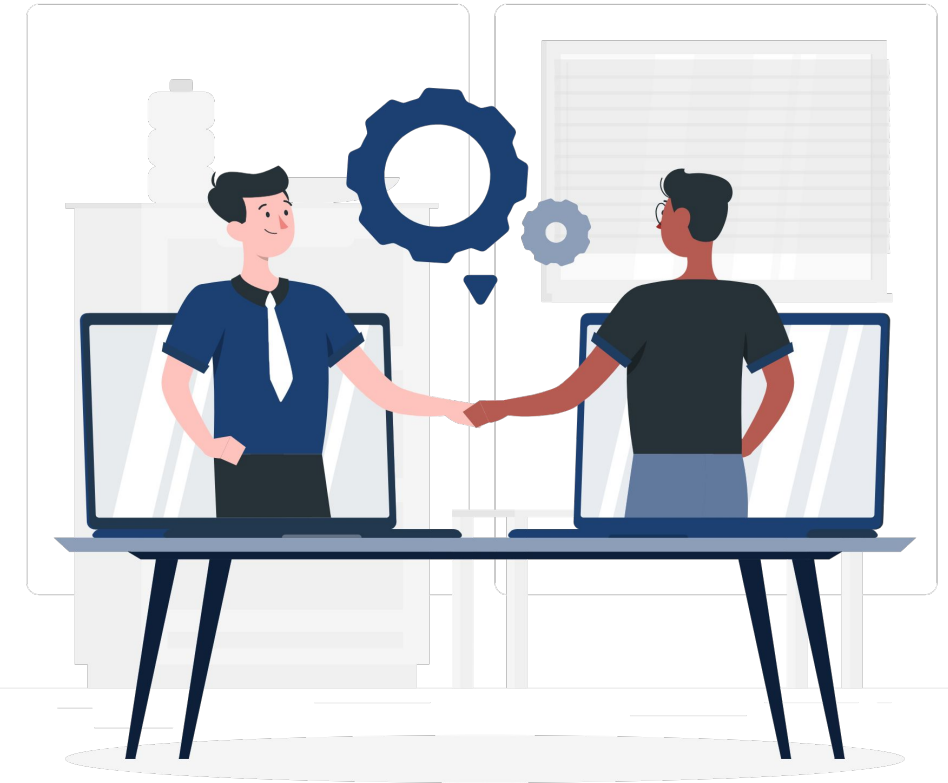
# Computer Requirements

HMIS Participating Agencies must adhere to the [HUD HMIS Technical Standards](#).

Each computer, tablet, or other device used to access HMIS must:

- Password Protected
- Locked out after **5 minutes** of inactivity
- Have virus protection software and firewall
- Be stored in a secure location, such as a locked office, when not in use.

KB: [HMIS Security Check Resources](#)



Graphic by: <https://storyset.com/online>

# Searching/Creating a Client Profile



# Client Search

The screenshot shows the OC Training Agency client search interface. At the top left, the text "OC Training Agency" is displayed. On the right side of the top navigation bar, the user's name "Michaela Simmons, OC Training Agency" and a profile picture with the initials "MS" are shown. Below the user name, there are navigation options: "SEARCH" (highlighted with an orange box), "CASELOAD", and "REFERRALS".

The main search area is titled "SEARCH FOR A CLIENT" and includes an "ADD CLIENT" button with a plus sign. Below this is a search input field with a magnifying glass icon and the placeholder text "Enter search terms for a client". To the right of the input field is a "SEARCH" button, also highlighted with an orange box. Below the input field, there is a note: "Use full name, partial name, date of birth or any combination." Below this note is a warning box with a triangle icon: "To search a client, please note that you can use any combination of: name (whole or part first or last name), DOB, SS number".

At the bottom left of the search area, it says "Managed with Clarity Human Services". At the bottom right, there is a link to "Recover deleted data".

On the right side of the interface, there is a section titled "Your recent client searches:" which lists the following names: Tweety Bird, Peyton Arellano, Jason Bravo, Johnny Bravo, and Ava Bravo.

Before creating a new client profile, make sure client is not already in the system by [searching](#) the client's **Name**, **SSN**, and/or **DOB**

\*\*\* can search by first two letters of first name and last name



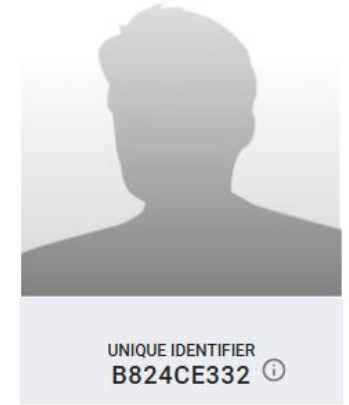
# If the profile does exist...

Review and verify the following:

- Social Security Number (SSN)
- Name
- Date of Birth (DOB)

## CLIENT PROFILE

Social Security Number	XXX - XX - 8871	
Quality of SSN	Full SSN Reported	
Last Name	Bird-Duck	
First Name	Tweety	
Quality of Name	Full name reported	
Quality of DOB	Full DOB Reported	
Date of Birth	01/01/1990	Adult. Age: 34
Middle Name	None	
Gender	Woman (Girl, if child), Man (Boy, if child)	
Race and Ethnicity	American Indian, Alaska Native, or Indigenous	
Additional Race and Ethnicity Detail		
Veteran Status	No	
OC CUSTOM QUESTIONS		
Alias		
Pronoun(s)	She, Her, Hers	
Federally Recognized Tribe	Select	



SAVE CHANGES

CANCEL

# Creating a New Client Profile

Profile page will ask you for:

- SSN
- Name
- DOB
- Gender
- Race/Ethnicity
- Veteran Status
  
- **Client Doesn't Know:** client does not know their Name, DOB, and/or their SSN
  
- **Client Prefers Not to Answer:** client prefers not to give their Name, DOB, and/or their SSN
  
- **Data Not Collected:** Didn't ask client for their Name, DOB, and/or their SSN

KB: [Adding Client Profiles to HMIS](#)

### CREATE A NEW CLIENT

➔ Social Security Number	000 - 00 - 5864
Quality of SSN	Approximate or partial SSN reported
➔ Last Name	Bunny
First Name	Bugs
Quality of Name	Full name reported
Quality of DOB	Approximate or partial DOB reported
➔ Date of Birth	01/01/1990 Adult. Age: 34
Middle Name	None
Gender	Man (Boy, if child)
Race and Ethnicity	White
Additional Race and Ethnicity Detail	
Veteran Status	No
OC CUSTOM QUESTIONS	
Alias	
Pronoun(s)	Select
Federally Recognized Tribe	Select

Please fill in Release of Information form CANCEL

### RELEASE OF INFORMATION

Permission	Yes
Start Date	10/30/2024
End Date	10/30/2031
Documentation	Select

CONSENT REFUSED

Consent Refused

- Select
- Electronic Signature
- Attached PDF
- Verbal Consent
- Household

KB: [Accessing and Completing Release of Information \(ROI\) Page](#)

[Refusing/Revoking Consent to Share Personal Information](#)

# Demo: Searching/Creating a Client Profile



# Creating and Managing Households



# What is a Household?

A household is a **single individual** or a **group of people** enrolling in a project together.

# Household Management

**Tweety Bird-Duck**  
Head of Household (HoH)  
(Client 1)



# The Duck Household

## Melissa Duck

Head of Household's Child  
(Client 2)



## Tweety Bird-Duck

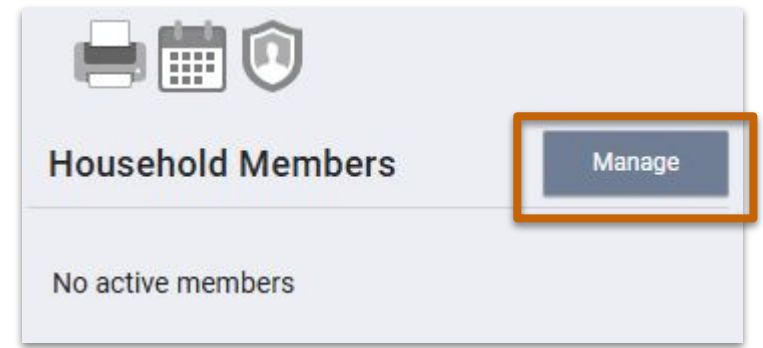
Head of Household (HoH)  
(Client 1)



# Global Household

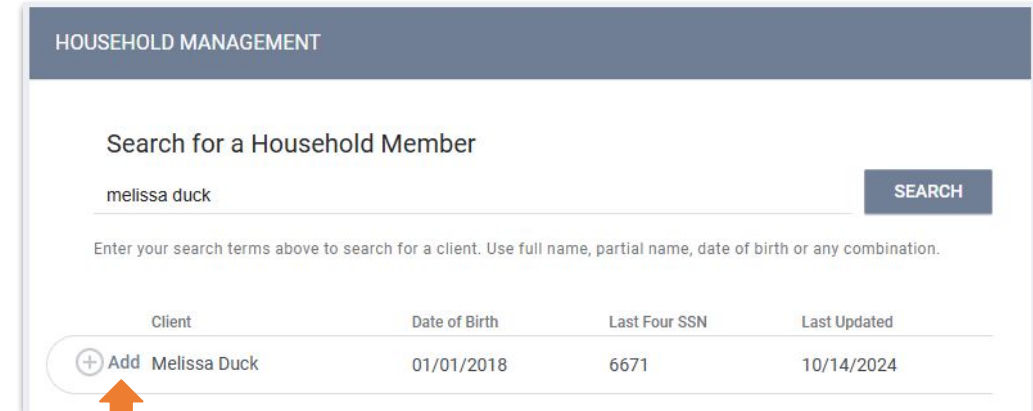
The [Global Household](#) is the household composition for client profiles.

- Navigate to Head of Household's profile, click Manage next to Household Members
- Search the additional household members
- Click *Add* to include them into a Global Household
- Assign the household member's relationship to the Head of Household



Household Members Manage

No active members



HOUSEHOLD MANAGEMENT

Search for a Household Member

melissa duck SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Client	Date of Birth	Last Four SSN	Last Updated
<span>+ Add</span> Melissa Duck	01/01/2018	6671	10/14/2024



ADD TO HOUSEHOLD ×

Member Type Daughter ▼

Start Date 09/30/2024 25

SAVE



# The Duck Household

## Melissa Duck

Head of Household's Child  
(Client 2)



## Tweety Bird-Duck

Head of Household (HoH)  
(Client 1)



## Daffy Duck

Head of Household's other  
relation member  
(Client 3)



2·1·1

Get Connected. Get Help.™

JOURNEY **1** TO **0**



# Global Household Cont

- Navigate to Head of Household's profile, click Manage next to Household Members
- Search the additional household members
- Click *Join* to include them into a Global Household
- Assign the household member's relationship to the Head of Household

HOUSEHOLD MANAGEMENT

Search for a Household Member

daffy duck SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

Client	Date of Birth	Last Four SSN	Last Updated
<a href="#">➤ Join</a> Daffy Duck Existing Group. Head of Household: Jonny Testingg. Members: 2	01/01/1989	5271	10/14/2024

JOIN HOUSEHOLD

Active client Tweety Bird-Duck will leave the existing Household to join Daffy Duck's Household

Transfer Daffy Duck from their existing Household to this Household

EXISTING HOUSEHOLD

Existing End Date 10/14/2024

Head of Household Jonny Testingg

**NEW HOUSEHOLD**

Member Type Husband

Start Date 10/14/2024

SAVE

# The Duck Household

**Melissa Duck**

Head of Household's Child



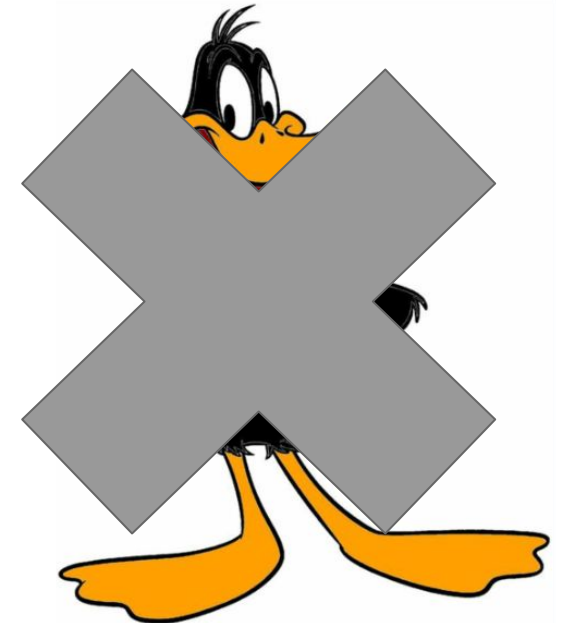
**Tweety Bird-Duck**

Head of Household (HoH)



**Daffy Duck**

Head of Household's other  
relation member



2·1·1

Get Connected. Get Help.™


JOURNEY 

United Way   
Orange County United Way

# Exiting a Client from the Global Household

- Navigate to Head of Household's profile, click Manage next to Household Members
- Click *Edit* next to the household member's name that you need to remove from the Global Household
- Push the toggle forward for *Exited Household*
- Add the date the household member is exiting the Global Household

Household Members		Manage
Melissa Duck	Daughter	
Daffy Duck	Husband	

Household Members		
Tweety Bird-Duck	Wife *	
Daffy Duck	Husband	
Melissa Duck	Daughter	

### EDIT GLOBAL HOUSEHOLD

Member Type: Husband

Head of Household: Tweety Bird-Duck

Joined Household: 10/23/2024

Exited Household:  10/30/2024

SAVE

# Demo: Creating and Managing Households



# Enrolling Clients Into a Project



# Enrolling Household into a New Project

- Navigate to Head of Household's profile and select *Programs*
- A list of active programs will be listed under the *Program Available* section
- Select program to enroll household in to

KB: [Enrolling Clients in a Project](#)

Tweety Bird

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS SERVICES

PROGRAM HISTORY

No results found

PROGRAMS: AVAILABLE

CoC Funded Family Coordinated Entry Training Project	▼
CoC Funded Permanent Supportive Housing Training Project	▼
CoC Funded Rapid Re-Housing Training Project	▼
CoC Funded Transitional Housing Training Project	▼
ESG Funded Emergency Shelter Training Program	▼
ESG Funded Homeless Prevention Training Project	▼
ESG Funded Rapid Re-Housing Training Project	▼

# Enrolling Household into a New Project

Expand to see details of the Project

Include group members in Project Enrollment by pushing the toggle forward for household member that is participating in the program

### ESG Funded Emergency Shelter Training Program

#### Active Clients

1199 CLIENTS

- 90 % Families
- 10 % Individuals

#### Referrals (90 Days)

3 REFERRALS

- 67 % Referrals Pending
- 33 % Referrals Connect
- 0 % Referrals Denied

**Funding Source**  
HUD: ESG – Emergency Shelter (operating and/or essential services)

**Availability**  
Limited Availability

**Service Categories:**

- ✓ No Category
- ✓ Case Management
- ✓ Other
- ✓ Housing
- ✓ Transportation
- ✓ Financial
- ✓ Food

**PROGRAM AVAILABILITY:**

▶ Available openings 4

**Include group members:**

➔  Melissa Duck

PRINT DIRECTIONS

**ENROLL**



# Enrolling Household into a New Project

## Project Start Date

- When did they begin working with the project (which can vary depending on the project type)?

## Transitional Assistance Needed

- This data element is used to understand how many clients need access to translation services, and if so, which languages are most often cited as needing translation

## Prior Living Situation

- This information is used to help determine if the household is chronically homeless.
- Type of Residence:** Where was the client just before the project start?
- Length of Stay in Prior Living Situation: How long did the client start staying in that place?
- Approximate Date this Episode of Homelessness Started:** How long has the client been in a “literal homeless” situation?
- Number of times on the streets, in ES, or Safe Haven in the past 3 years:** How many times has the client been in “literal homeless” situations in the past 3 years?
- Total number of months homelessness on the street, in ES, or Safe Haven in the past 3 years:** How many cumulative months has the client been in “literal homeless” situations in the past 3 years?

PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM

Enrollment History Provide Services Assessments Goals Notes Files Forms X Exit

## Enroll Program for client Tweety Bird-Duck

Project Start Date 09/30/2024

### TRANSLATION ASSISTANCE NEEDED

Translation Assistance Needed No

### PRIOR LIVING SITUATION

Type of Residence Place not meant for habitation (e.g., a vehicle, an abandoned building, bu

Length of Stay in Prior Living Situation One year or longer

Approximate date this episode of homelessness started 02/02/2022

Number of times on the streets, in ES, or Safe Haven in the past three years One Time

Total number of months homeless on the streets, in ES, or Safe Haven in the past three years More than 12 Months

# Enrolling Household into a New Project Cont

## Disabling Condition

- Does the client have a disabling condition? Helps to determine client's Chronic Homelessness Status
- It is important that if the client does have a disabling condition you select Yes and then Yes for the type of disability they have:
  - Physical
  - Developmental
  - HIV/Aids
  - Chronic Health Conditions
  - Mental Health
  - Substance Use Disorder

DISABLING CONDITIONS AND BARRIERS			
Disabling Condition	Yes	▼	
Physical Disability	Yes	▼	Long Term Yes ▼
Developmental Disability	No	▼	
Chronic Health Condition	No	▼	
HIV - AIDS	No	▼	
Mental Health Disorder	No	▼	
Substance Use Disorder	No	▼	
Survivor of Domestic Violence	No	▼	

# Enrolling Household into a New Project Cont

## Monthly Income/Sources and Non Cash Benefits

- To determine whether households are accessing all income sources/mainstream program benefits for which they are eligible at the time of project start and to allow for analyzing changes in income between project start, annual assessment, and exit.

MONTHLY INCOME AND SOURCES	
Income from Any Source	Yes
Earned Income	<input type="checkbox"/>
Unemployment Insurance	<input type="checkbox"/>
Supplemental Security Income (SSI)	<input type="checkbox"/>
Social Security Disability Insurance (SSDI)	<input checked="" type="checkbox"/> Amount <input type="text" value="400.00"/>
VA Service-Connected Disability Compensation	<input type="checkbox"/>
VA Non-Service Connected Disability Pension	<input type="checkbox"/>
Private Disability Insurance	<input type="checkbox"/>
Worker's Compensation	<input type="checkbox"/>
Temporary Assistance for Needy Families (TANF)	<input type="checkbox"/>
General Assistance (GA)	<input type="checkbox"/>
Retirement Income from Social Security	<input type="checkbox"/>
Pension or Retirement Income from a Former Job	<input type="checkbox"/>
Child Support	<input type="checkbox"/>
Alimony and Other Spousal Support	<input type="checkbox"/>
Other Income Source	<input type="checkbox"/>
Total Monthly Income for Individual	<input type="text" value="400.00"/>

NON-CASH BENEFITS	
Receiving Non-Cash Benefits	Yes
Supplemental Nutrition Assistance Program (SNAP)	<input checked="" type="checkbox"/>
Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	<input type="checkbox"/>
TANF Childcare Services	<input type="checkbox"/>
TANF Transportation Services	<input type="checkbox"/>
Other TANF-Funded Services	<input type="checkbox"/>
Other Non-Cash Benefit	<input type="checkbox"/>

# Enrolling Household into a New Project Cont

## Health Insurance

- To determine whether clients are accessing all mainstream medical assistance benefits for which they may be eligible, and to ascertain a more complete picture of changes to economic circumstances between project start and exit.

## OC Custom Questions

- To collect additional information for reporting and may be used in program eligibility review

HEALTH INSURANCE

Covered by Health Insurance Yes

MEDICAID

MEDICARE

State Children's Health Insurance Program

Veteran's Health Administration (VHA)

Employer-Provided Health Insurance

Health Insurance Obtained Through COBRA

Private Pay Health Insurance

State Health Insurance for Adults

Indian Health Services Program

Other Health Insurance

OC CUSTOM QUESTIONS

What city were you in immediately prior to entry into this project? Brea

What state were you born in? CA - California

What country were you born in?

Employment Status Unemployed

SAVE & CLOSE CANCEL

# Enrolling Additional Household Members

If you want to enroll an additional client into a project where the household members are already enrolled, you would need to enroll the client from the Programs page of any of the household members that were originally enrolled.

- Navigate to *Program Enrollment* and select *Add* next to Program Group Members
- *Push the toggle forward* and click *Enroll*
- Complete program enrollment for additional household member

PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM

30 DAYS ACTIVE PROGRAM

Program Type: Group (2)  
Program Start Date: 09/30/2024  
Assigned Staff: Michaela Simmons  
Head of Household: Tweety Bird-Duck

Program Group Members + Add

Melissa Duck 09/30/2024 Active

Status Assessments +

Enrollment History Provide Services Assessments Goals Notes Files Forms X Exit

Program Service History LINK FROM HISTORY

Service Name	Start Date	End Date	
Housing Notes:Notes OC Training Agency	10/30/2024	10/30/2024	
Bed Night - ESG Emergency Shelter:Bed Night OC Training Agency	10/28/2024	10/28/2024	

ENROLL ADDITIONAL MEMBERS

→  Daffy Duck Husband

ENROLL

KB: [Enrolling Additional Household Members](#)  
& [Understanding Individual Enrollments and Group Enrollments](#)

# Demo: Enrolling Clients Into a Project



# Services, Notes and Assessments




# Adding Services

Tweety Bird-Duck

PROFILE HISTORY **PROGRAMS** ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS SERVICES

### PROGRAM HISTORY

	Program Name	Start Date	End Date	Type
	ESG Funded Emergency Shelter Training Program Emergency Shelter – Entry Exit OC Training Agency ⓘ	09/30/2024	Active	Group

On Tweety's profile, click on the **Programs** tab and the **Edit** icon next to the project you want to add services to



# Example: Add Transportation Service

Click on...

**Provide Services** tab

Select from list of **Services**

And select **Service Item**

PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM

Enrollment History **Provide Services** Assessments Goals Notes Files Forms X Exit

**Services**



- Bed Night - ESG Emergency Shelter Housing ▾
- Case Management Case Management ▾
- Financial Assistance Financial ▾
- Food Food ▾
- Housing Notes Case Management ▾
- Transportation** Transportation ▾
  - Bus Pass ▾
  - Other Transportation ▾

# Example: Finalize Transportation Service


Add in...  
**Start & End Date**  
Include **Group Members** if  
necessary  
Provide **Service Note**  
**Save!**

Transportation Transportation ▾

**Bus Pass** ^





**Start Date:** 10/30/2024  **End Date:** 10/30/2024 


**Include group members:**

  Melissa Duck

**Geolocation :**

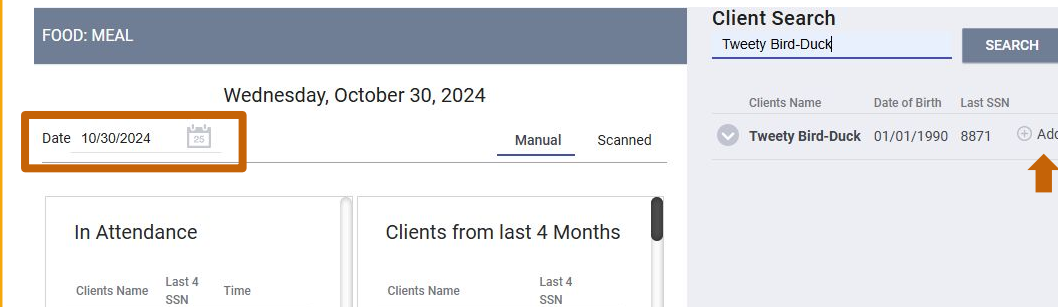
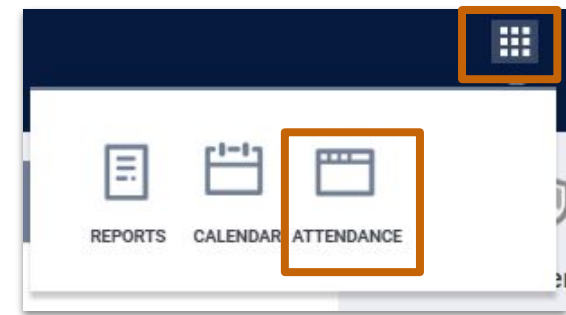
**Service Note :**

 Case Manager provide 30 day bus pass to household for their transportation need. Household currently does not have a car and the bus is their primary mode of transportation. |

# Adding Attendance Based Services

- Navigate to *Launch Pad* and select *Attendance*
- Click on the Edit button next to the Service that you would like to add an Attendance for
- Select *Date*
- Add Client by searching under *Client Search*
- Client will be listed under *In Attendance* when the Attendance Based Service is recorded



# Demo: Services



# Housing Notes

- Navigate to *Program Enrollment* and select *Provide Services*
- Select *Housing Notes*
- Enter *Date* and input *Tracking* data as needed
- Enter in *Notes* in the text box and click *Submit* to record the Housing Notes updates

KB: [Recording Case Notes and Housing Notes in HMIS](#)

PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM

Enrollment History **Provide Services** Assessments Goals Notes Files Forms X Exit

Services

Bed Night - ESG Emergency Shelter Housing ▾

Case Management Case Management ▾

Financial Assistance Financial ▾

Food Food ▾

**Housing Notes** Case Management ▾

Notes

Start Date: 10/30/2024 End Date: 10/30/2024

Tracking: None ▾ None ▾

Service Note :

(Purpose): Client is in need of housing services.  
(Intervention): Identified programs that the client may be eligible for. Referred client to opportunity to complete program application.  
(Response): Client agrees that she will work on collecting required documentation and completing program application.  
(Plan): Client will apply for the program opportunity identified by next Friday and provide an update at our meeting in two weeks.

SUBMIT

# Case Notes

- Navigate to Program Enrollment and click *Notes*
- Click *Add Notes*
- Enter in the *Title* of the Note, when the note was created, enable *Time Tracking* as needed add a description of the note.

KB: [Creating Client Notes and Public Alerts](#)

PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM

Enrollment History Provide Services Assessments Goals **Notes** Files Forms X Exit

Client Program Notes **ADD NOTE**

Title	Category	Staff	Date
Client needs Assistance with Child care OC Training Agency ⓘ	Case Management	Michaela Simmons	10/23/2024 <input type="checkbox"/>

PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM

Enrollment History Provide Services Assessments Goals **Notes** Files Forms X Exit

CLIENT NOTES

**Title** Client needs Assistance with Child care

**Category** Case Management

**Agency** OC Training Agency

**Date** 10/23/2024  **Time Tracking** 1 hour 15 min

**Note**

Client needs assistance with child care due to finding a new job. Case Manager and Client searched free and affordable child care options for household. Client's Child is eligible for an afternoon school program and Client will contact administrative office for program application. |

# Public Alerts

- Click on the *Notes* tab on the *Profile Screen*
- Click *Add Alert* under the *Public Alerts* section
- Add a title, date the alert is set to expire, a description of the message

KB: [Creating Client Notes and Public Alerts](#)

The screenshot shows the profile page for 'Tweety Bird-Duck'. The 'NOTES' tab is highlighted in the top navigation bar. Below it, the 'CLIENT NOTES' section contains one entry: 'Client needs Assistance with Child care' by 'OC Training Agency' in the 'Case Management' category, dated '10/23/2024'. The 'PUBLIC ALERTS' section has an 'ADD ALERT +' button highlighted in orange. It contains one entry: 'Client missing id card.' by 'OC Training Agency', which expires on '10/31/2024'.

This screenshot shows the 'PUBLIC ALERTS' form. The 'Title' field is 'Client missing id card.' with an orange arrow pointing to it. The 'Agency' field is 'OC Training Agency'. The 'Expiration Date' field is '10/31/2024' with a calendar icon and an orange arrow pointing to it. The 'Note' field contains a text area with a rich text editor toolbar (bold, italic, list, link) and an orange arrow pointing to the text: 'Client is missing their identification card. Client accidentally left at the office during intake, will be available to pick up at OC Training Agency.'

# Demo: Notes and Public Alerts





# Status Assessment

- Navigate to Program Enrollment
- Select the Assessment tab and click *Start* next to the Status Assessment
- Record an update

KB: [Status and Annual Assessments](#)

PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM

Enrollment History Provide Services **Assessments** Goals Notes Files Forms X Exit

Assessments LINK FROM ASSESSMENTS


Current Living Situation	START
Status Update Assessment	START
Annual Assessment	START

# Status Assessments

PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM

Enrollment History Provide Services **Assessments** Goals Notes Files Forms × Exit

Status Update for client Tweety Bird-Duck DELETE PROGRAM STATUS

Project Status Date 10/30/2024 

DISABLING CONDITIONS AND BARRIERS

Physical Disability	Yes	▼	Long Term	Yes	▼
Developmental Disability	No	▼			
Chronic Health Condition	No	▼			
HIV - AIDS	No	▼			
Mental Health Disorder	No	▼			
Substance Use Disorder	No	▼			
Survivor of Domestic Violence	No	▼			


MONTHLY INCOME AND SOURCES

Income from Any Source Yes ▼

Earned Income

Unemployment Insurance

Supplemental Security Income (SSI)

Social Security Disability Insurance (SSDI)  Amount 500.00 

VA Service-Connected Disability Compensation

VA Non-Service Connected Disability Pension

Private Disability Insurance

Worker's Compensation

Temporary Assistance for Needy Families (TANF)

General Assistance (GA)

Retirement Income from Social Security

Pension or Retirement Income from a Former Job

Child Support

Alimony and Other Spousal Support

Other Income Source

Total Monthly Income for Individual 500.00

NON-CASH BENEFITS

Receiving Non-Cash Benefits Yes ▼

Supplemental Nutrition Assistance Program (SNAP)

Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

TANF Childcare Services

TANF Transportation Services

Other TANF-Funded Services

Other Non-Cash Benefit

HEALTH INSURANCE

Covered by Health Insurance Yes ▼

MEDICAID

MEDICARE

State Children's Health Insurance Program

Veteran's Health Administration (VHA)

Employer-Provided Health Insurance

Health Insurance Obtained Through COBRA

Private Pay Health Insurance

State Health Insurance for Adults

Indian Health Services Program

Other Health Insurance

SAVE & CLOSE CANCEL

# Annual Assessment

Conduct an Annual Assessment within the 30 day window before or after the client's one year anniversary of their Program Start Date, if they are still active as of one year from their Start Date.

- Navigate to Program Enrollment
- Select the Assessment tab and click *Start* next to the Annual Assessment
- Record the client's data at one year anniversary of their Project Start Date

KB: [Status and Annual Assessments](#)

PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM

Enrollment History Provide Services **Assessments** Goals Notes Files Forms X Exit

Assessments LINK FROM ASSESSMENTS

Current Living Situation	START
Status Update Assessment	START
Annual Assessment	START

# Demo: Status and Annual Assessments



# Exiting a Client from a Project



# Exiting a Client from a Project

- Navigate to Program Enrollment
- Select *Exit*
- *Push toggle forward* for members who are also exiting the project as needed
- Click *End Program*

KB: [HMIS Security Check Resources](#)

PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM

29 DAYS ACTIVE PROGRAM

Program Type: Group (3)

Program Start Date: 09/30/2024

Assigned Staff: Michaela Simmons

Head of Household: Tweety Bird-Duck

Enrollment History Assessments Goals Notes Files Forms **Exit**

Program Service History

SELECT CLIENTS TO EXIT FROM PROGRAM

Tweety Bird-Duck Wife

Melissa Duck Daughter

END PROGRAM

# Exiting a Client from a Project

- [Project Exit Date](#): The project exit date determine the end of a client's period of participation with a project. Record the month, day and year of last day of occupancy or service.
- [Destination](#): Select the 'Destination' that most closely matches where the client will be staying after exiting the project.
- Review the Disabling Condition, Income, Non Cash Benefits, and Health Insurance and add updates as needed

KB: [Exiting Clients from a Project](#)

## End Program for client Tweety Bird-Duck

Project Exit Date 10/30/2024 

Destination Rental by client, no ongoing housing subsidy 


### DISABLING CONDITIONS AND BARRIERS

Physical Disability Yes  Long Term Yes 

Developmental Disability No 

Chronic Health Condition No 

HIV - AIDS No 

Mental Health Disorder No 

Substance Use Disorder No 

### MONTHLY INCOME AND SOURCES

Income from Any Source Yes 

Earned Income 

Unemployment Insurance 

Supplemental Security Income (SSI) 

Social Security Disability Insurance (SSDI)  Amount 500.00

# Demo: Exiting a Client from Project





# HMIS Reports: Program Roster

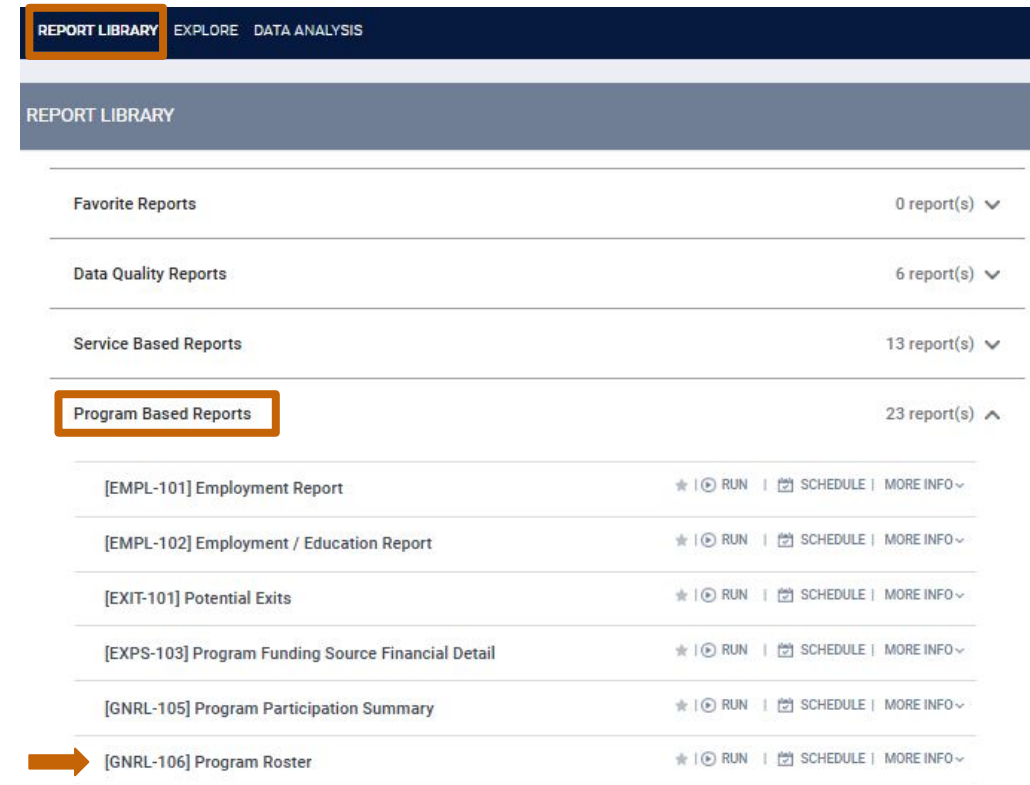
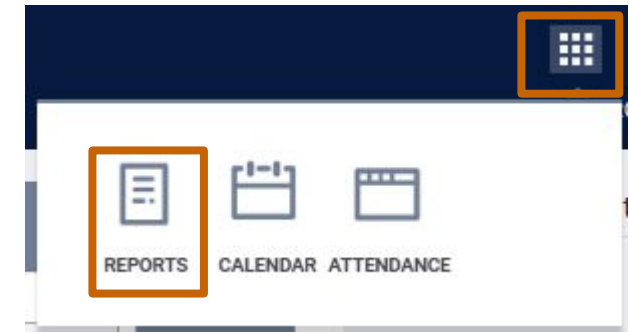


# HMIS Reports

**Report Library:** This contains “canned reports” these are reports that are made so you will only need to adjust a few filters such as Date Range, Program Name, etc.

**Explore:** You will have the chance to play with Looker and create custom reports.

**Data analysis:** This is a library of reports that will contain any custom reports we have created specifically for your agency.



# Running the Program Roster Report

- **Program:** ESG Funded Emergency Shelter Training Program
- **Status:** Active within Report Date Range
- **HoH Only?:** Select No to include all household members. Select Yes if you want a report with only the Head of Households.
- **Report Date Range:** Range in which Data is generated
- **Report Output Format**
  - **Web Page:** interactive, taken to client record
  - **PDF:** Official reports, grants, records
  - **Excel:** Organize and manipulate data

KB: [Running HMIS Canned Reports](#) & [Viewing All Clients in a Program](#)

REPORT LIBRARY EXPLORE DATA ANALYSIS PREVIEW

REPORT LIBRARY

Program Based Reports > [GNRL-106] Program Roster

Program(s) CoC Funded Permanent Supportive Housing Training Project  
CoC Funded Rapid Re-Housing Training Project  
CoC Funded Transitional Housing Training Project  
ESG Funded Emergency Shelter Training Program  
ESG Funded Homeless Prevention Training Project

Status Active within Report Date Range

HoHs Only?  No  Yes

Report Date Range 09/30/2024 – 10/30/2024

Report Output Format  Web Page  PDF - Program  PDF - Program and Unit  Excel

SUBMIT

COMPLETED

[GNRL-106] Program Roster Processed OPEN

# Program Roster Report

## Program Roster Report

OC Training Agency

Active within 09/30/2024 thru 10/30/2024

Housing Move-in: Undefined = Unknown HoH or adjusted Move-in is Null,  = Non PH Project, A: Assessments, S: Services, CN: Case Notes

You can find more information about adjusted Move-In Date at the [Help Center Article](#)

Head of Household (HoH) Unique Identifiers are listed in bold text. Household members are grouped together with the HoH.

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	A	S	CN	Assigned Staff	Unit Assignment	Bed Assignment	Occupancy Start Date	Occupancy End Date
<i>Program: ESG Funded Emergency Shelter Training Program</i>																

# Demo: Program Roster



# Thank you Have a great day!

Training materials and recording will be available on the [OC HMIS website](#).





Throughout 2024, Orange County United Way is celebrating 100 years of impact in our community. We invite you to join us on our year-long Journey to 100 centennial celebration as we prepare for another century of caring for each other The OC Way. Learn more and see how you can get involved.

[UnitedWayOC.org/Journey-to-100](https://UnitedWayOC.org/Journey-to-100)