Welcome!

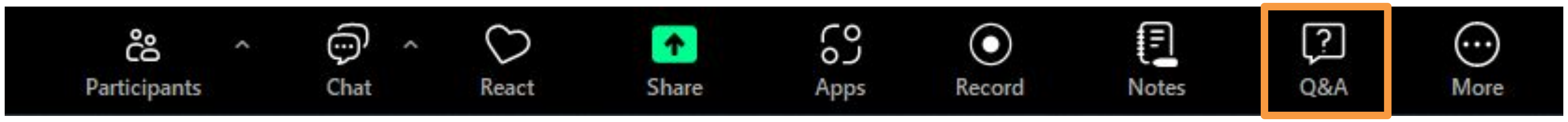
March 2025
HMIS Part 2 Training

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.

Q&A



To better organize questions the HMIS Helpdesk receives during the training, our Team recommends that you submit your questions through the Q&A option.

We request that you keep your questions general and related to the topics discussed in the training.

Agency specific questions is best supported through a HMIS Helpdesk ticket submission. Please coordinate with your HMIS Agency Admin to submit a ticket, so our Team is able to further investigate and provide assistance for your request.

Introductions and Policies

2·1·1
Get Connected. Get Help.™

United Way
Orange County United Way

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

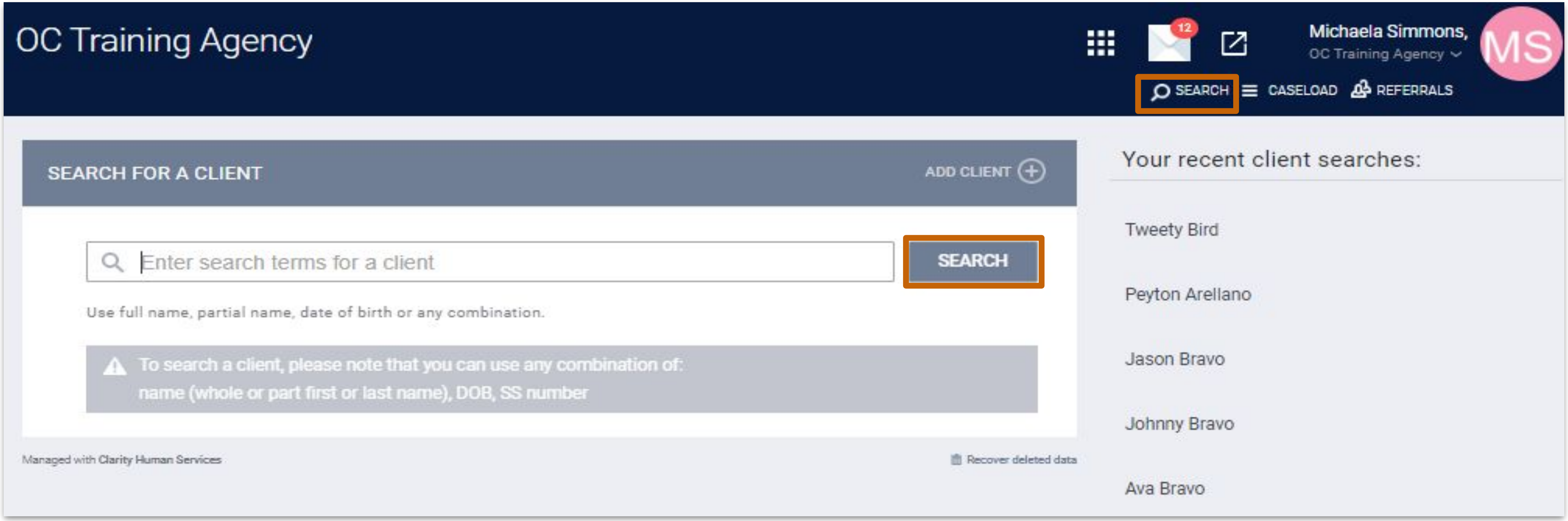
Graphic by: https://storyset.com/online

Searching/Creating a Client Profile

2·1·1
Get Connected. Get Help.™

United Way
Orange County United Way

Client Search



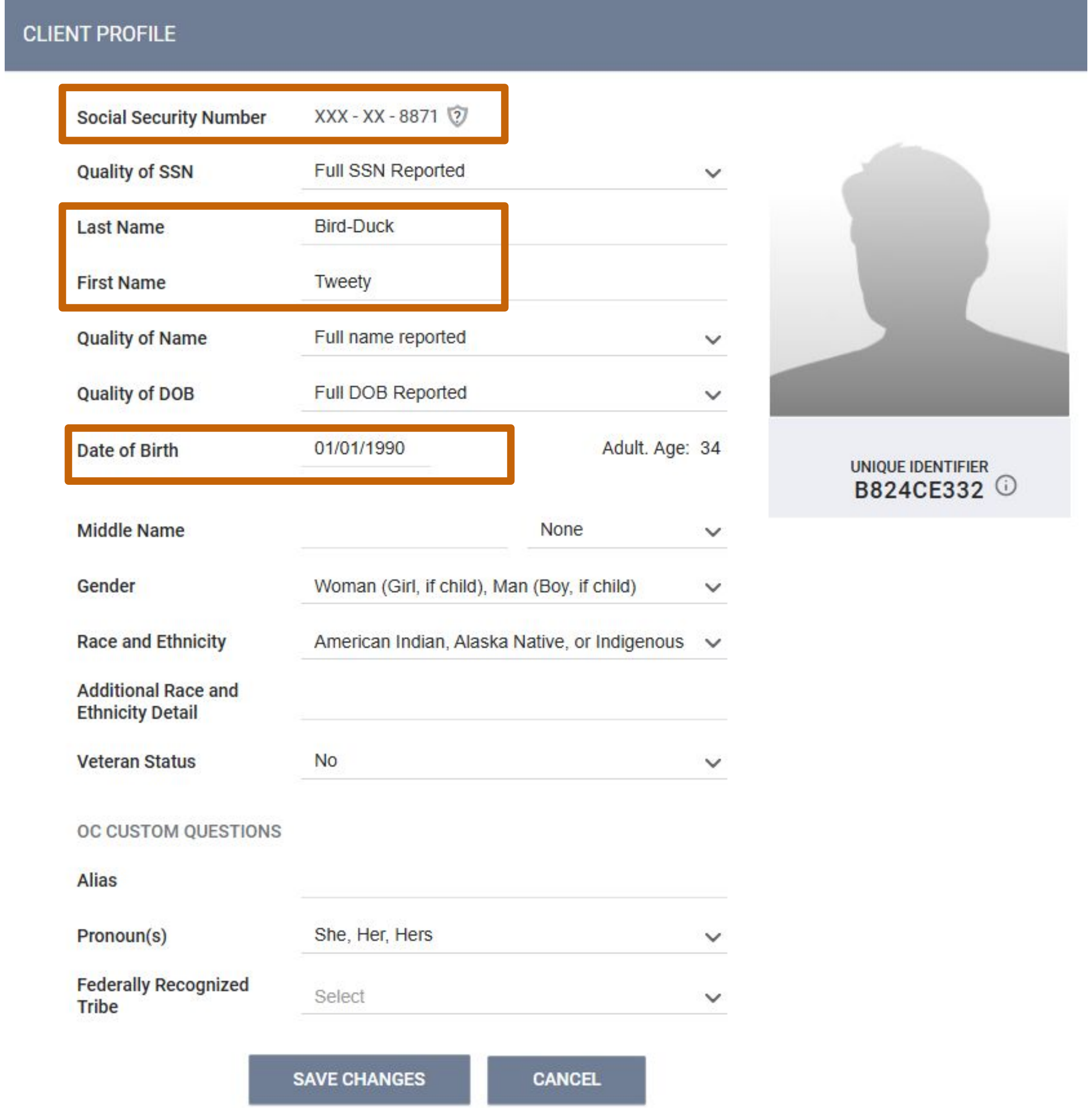
Before creating a new client profile, make sure client is not already in the system by searching the client's **Name**, **SSN**, and/or **DOB**

***** 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)



Creating a New Client Profile

Profile page will ask you for:

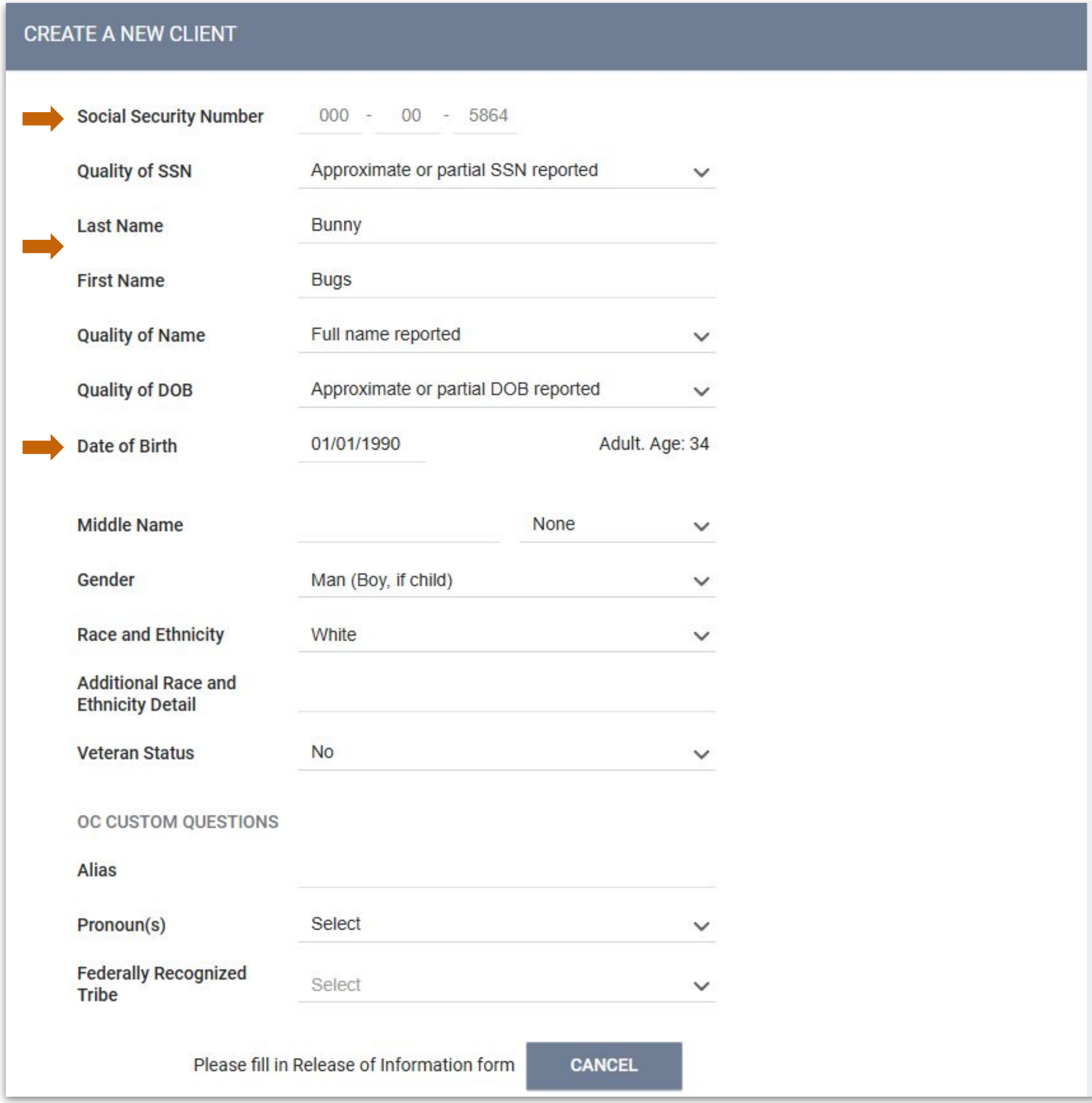
- SSN
- Name
- DOB
- Gender
- Race/Ethnicity
- Veteran Status

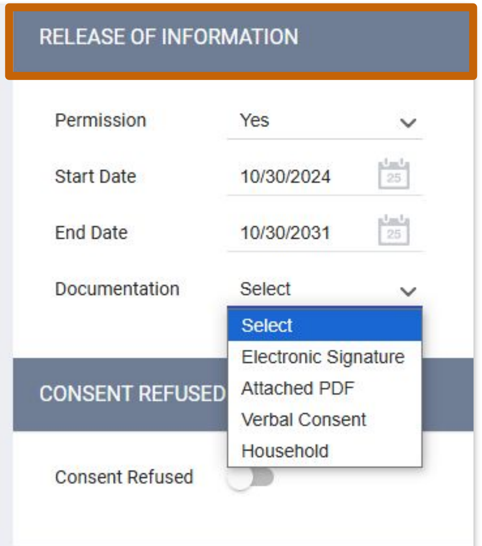
- **Client Doesn't Know**: client does not know their Name, DOB, and/or their SSN

- **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





KB: Accessing and Completing Release of Information (ROI) Page

Refusing/Revoking Consent to Share Personal Information

Demo: Searching/Creating a Client Profile

Get Connected. Get Help.™

Orange County United Way

Creating and Managing Households

Get Connected. Get Help.™

Orange County United Way

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

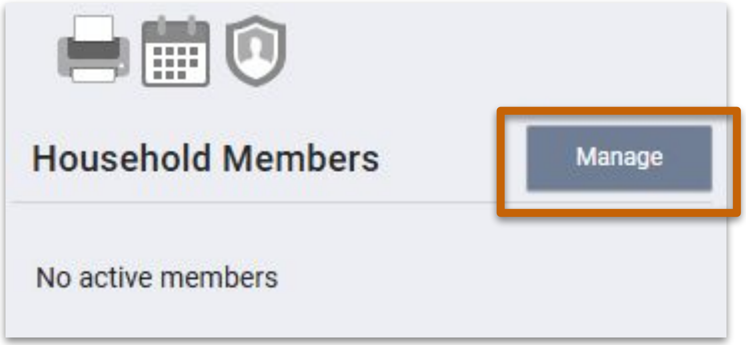
Tweety Bird-Duck
Head of Household (HoH)
(Client 1)

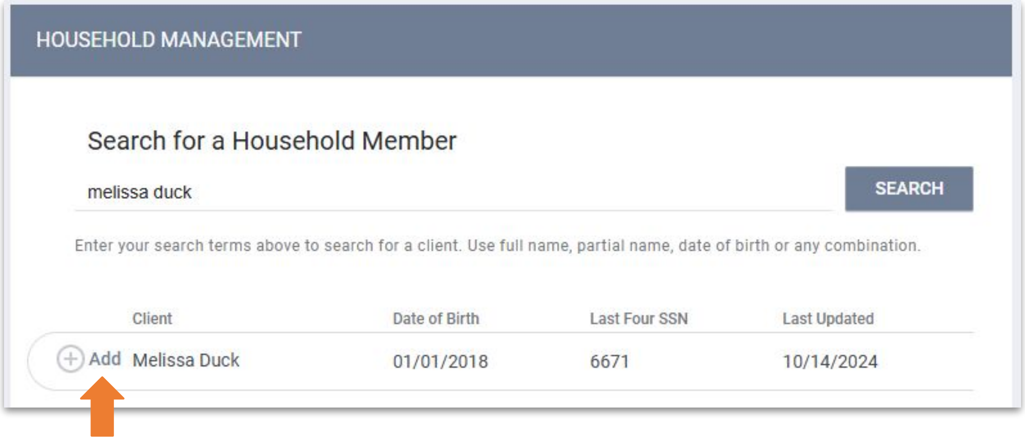
Melissa Duck
Head of Household's Child
(Client 2)

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





The Duck Household

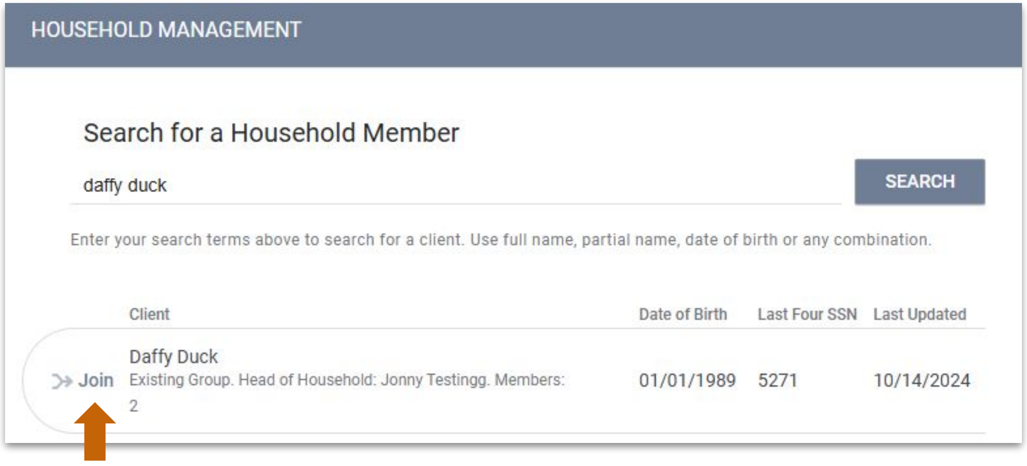
Melissa Duck
Head of Household’s Child
(Client 2)

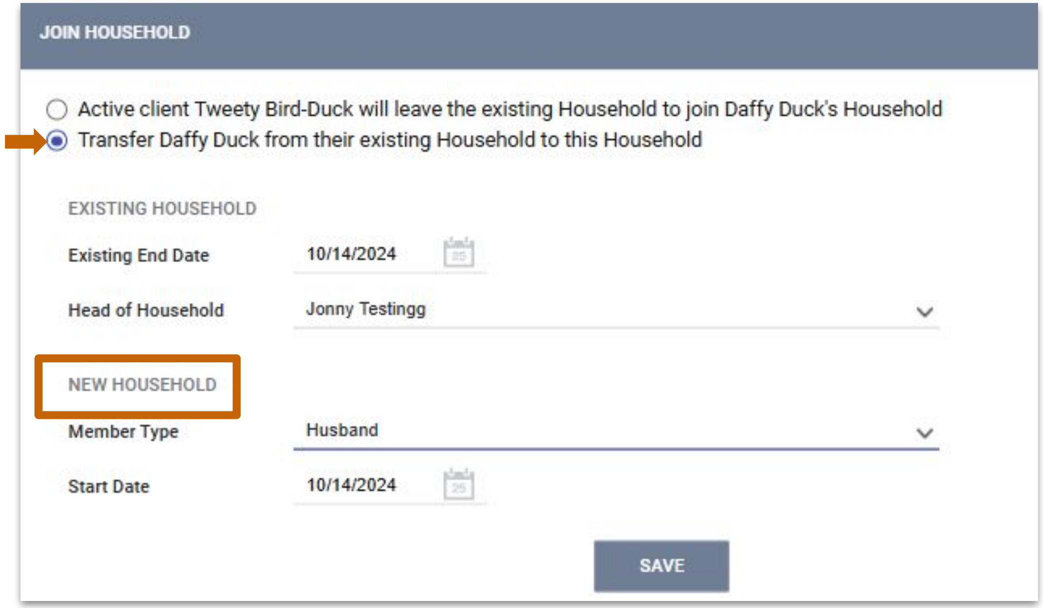
Tweety Bird-Duck
Head of Household (HoH)
(Client 1)

Daffy Duck
Head of Household’s other relation member
(Client 3)

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



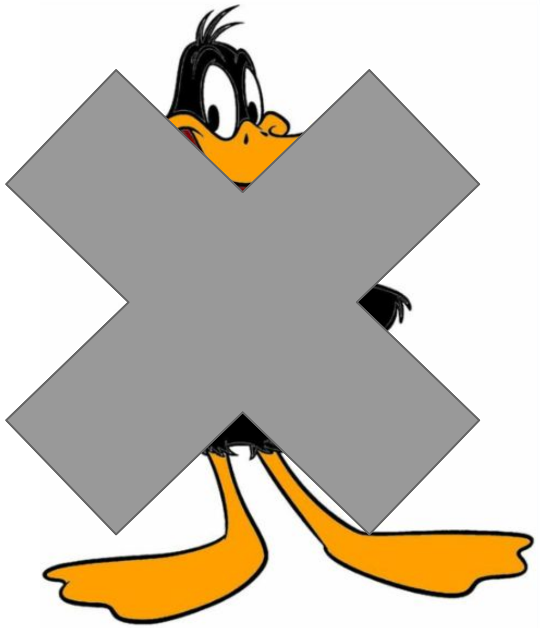


The Duck Household

Tweety Bird-Duck
Head of Household (HoH)

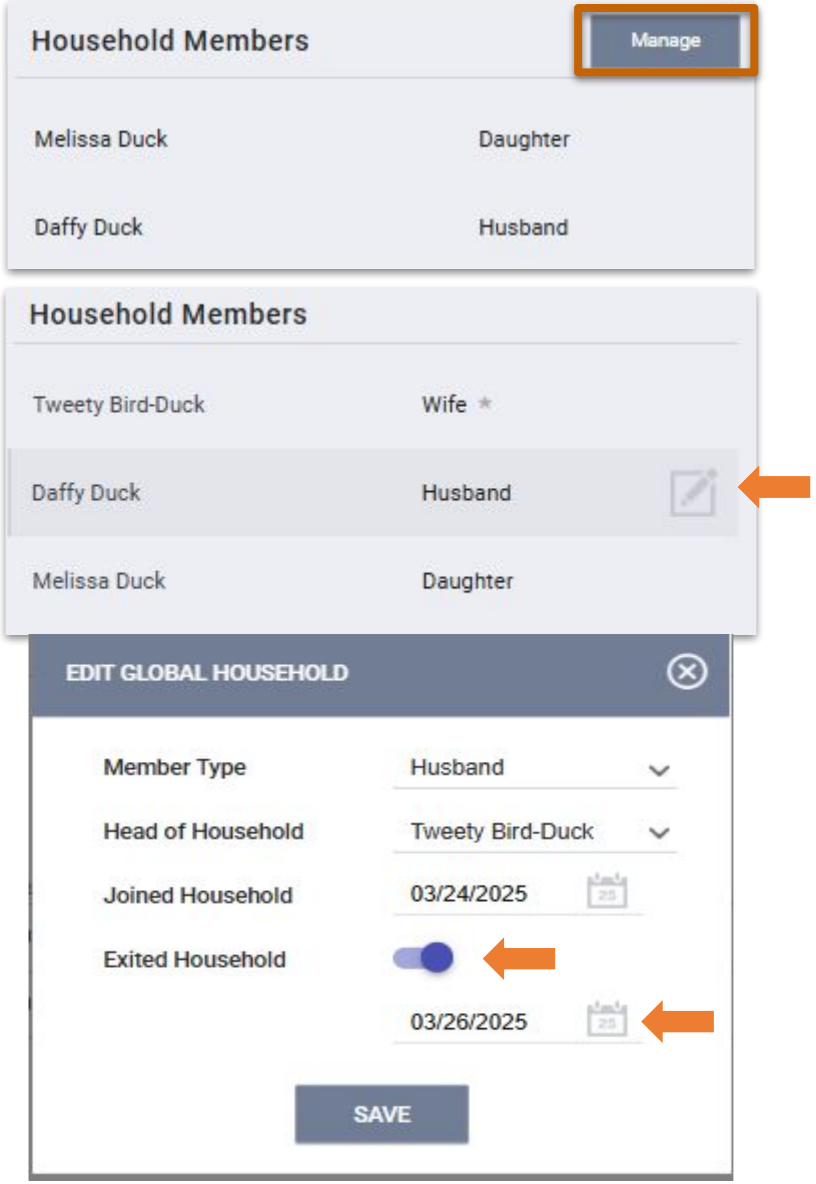
Melissa Duck
Head of Household's Child

Daffy Duck
Head of Household's other relation member



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



Demo: Creating and Managing Households

Get Connected. Get Help.™

Orange County United Way

Enrolling Clients Into a Project

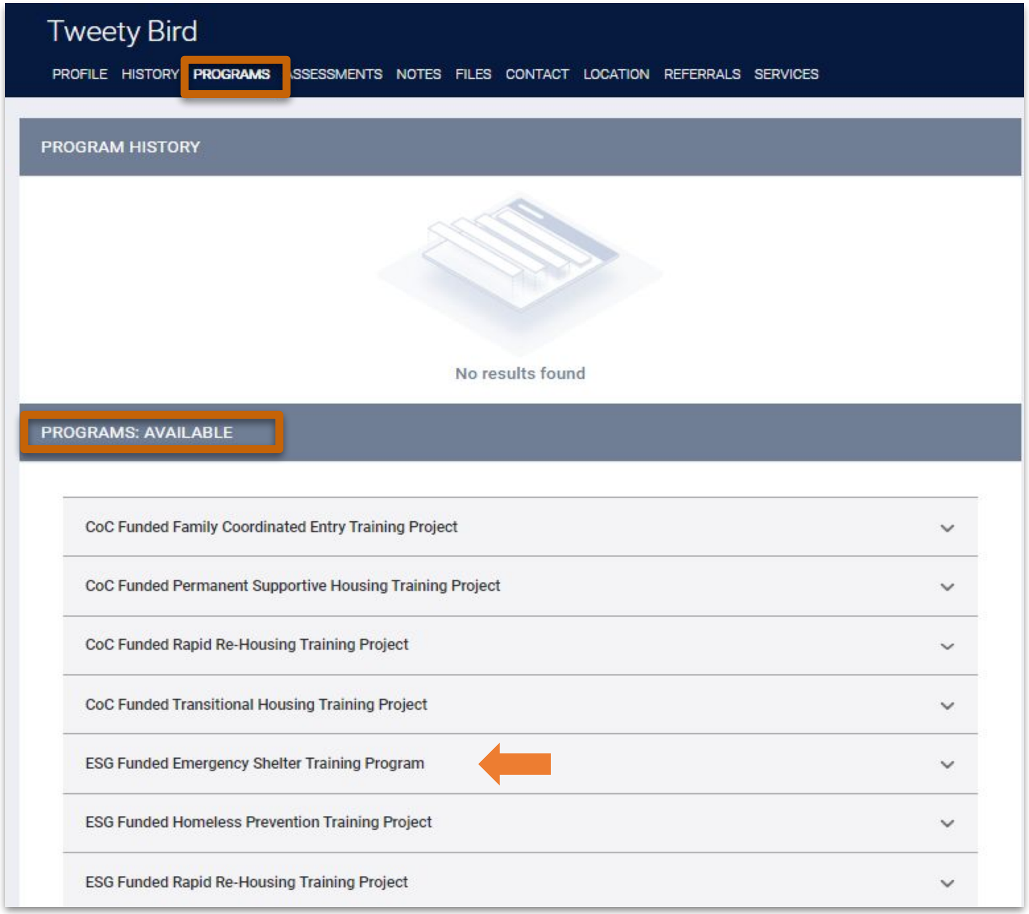
2·1·1
Get Connected. Get Help.™

United Way
Orange County United Way

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

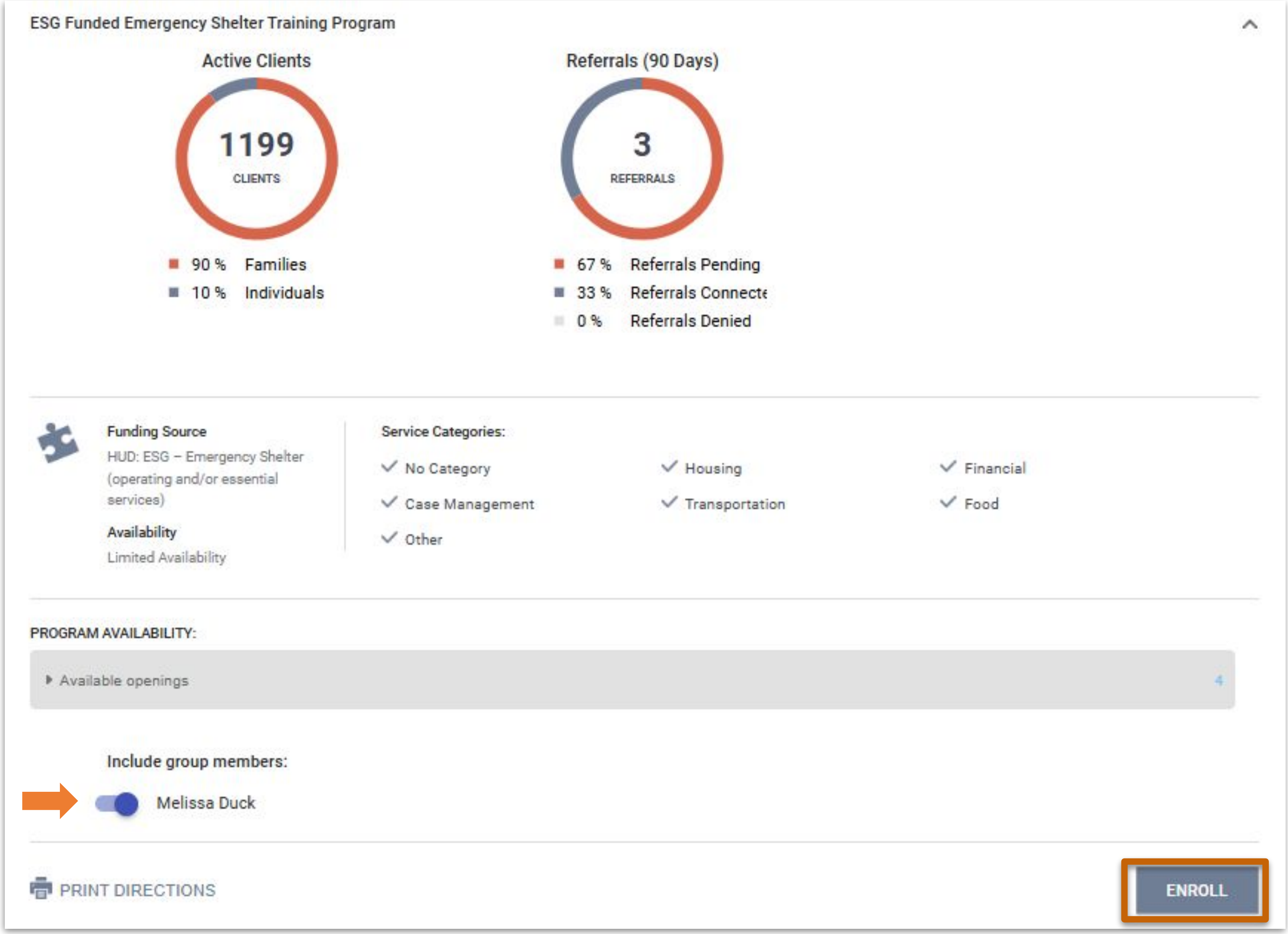
KB: [Enrolling Clients in a Project]



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



Enrolling Household into a New Project

Project Start Date

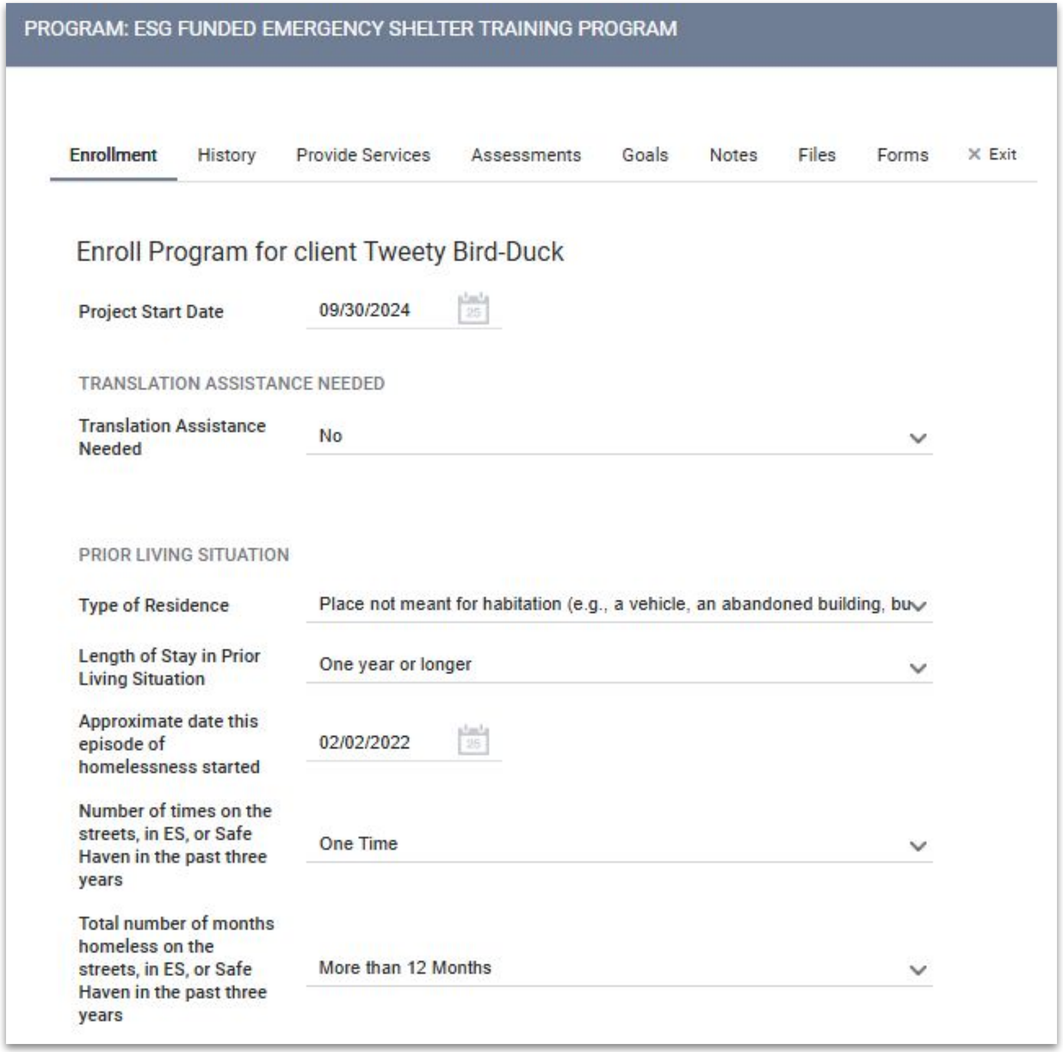
- When did they begin working with the project (which can vary depending on the project type)?

Translation 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 | × 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		
Unemployment Insurance		
Supplemental Security Income (SSI)		
Social Security Disability Insurance (SSDI)		Amount 400.00
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	400.00	

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	

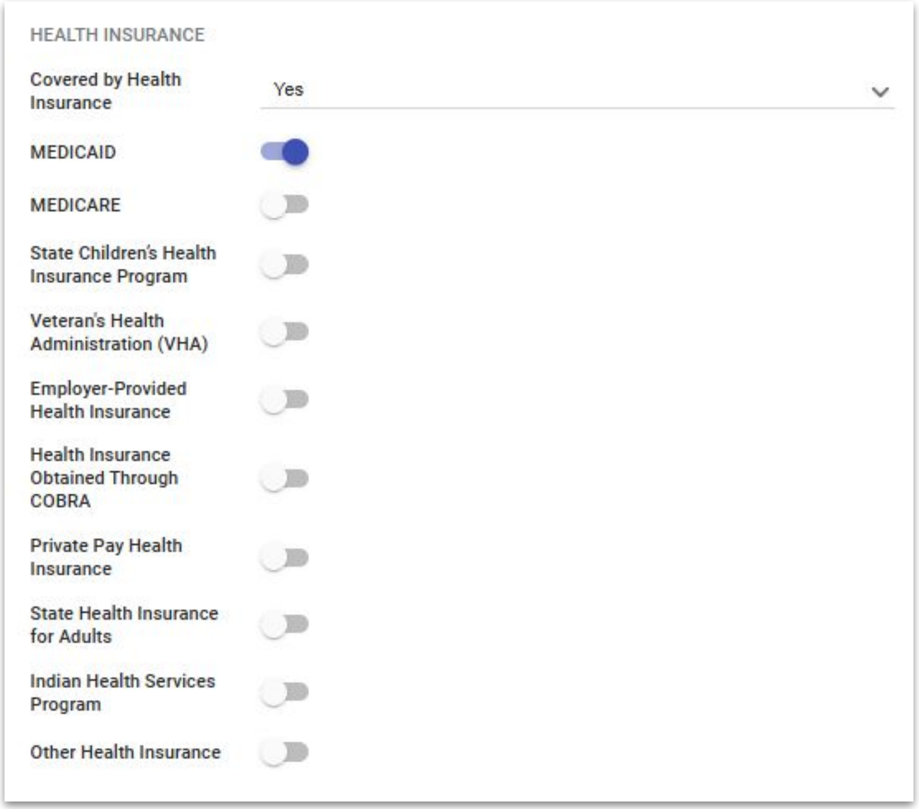
Enrolling Household into a New Project Cont

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.

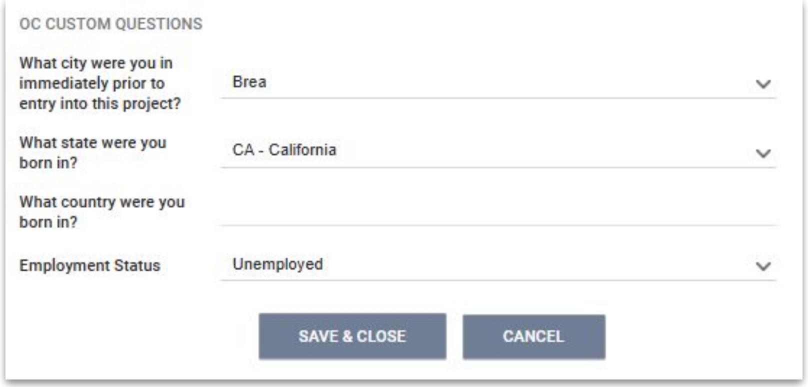
OC Custom Questions

- 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

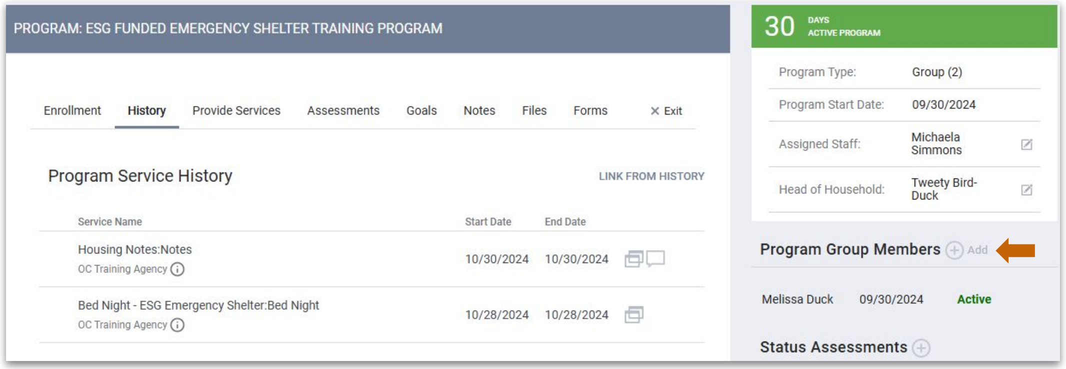
What city were you in immediately prior to entry into this project?	Brea
What state were you born in?	CA - California
What country were you born in?	
Employment Status	Unemployed

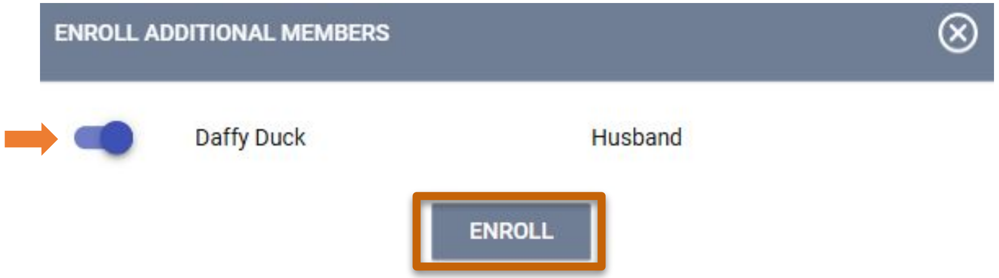
SAVE & CLOSE CANCEL

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





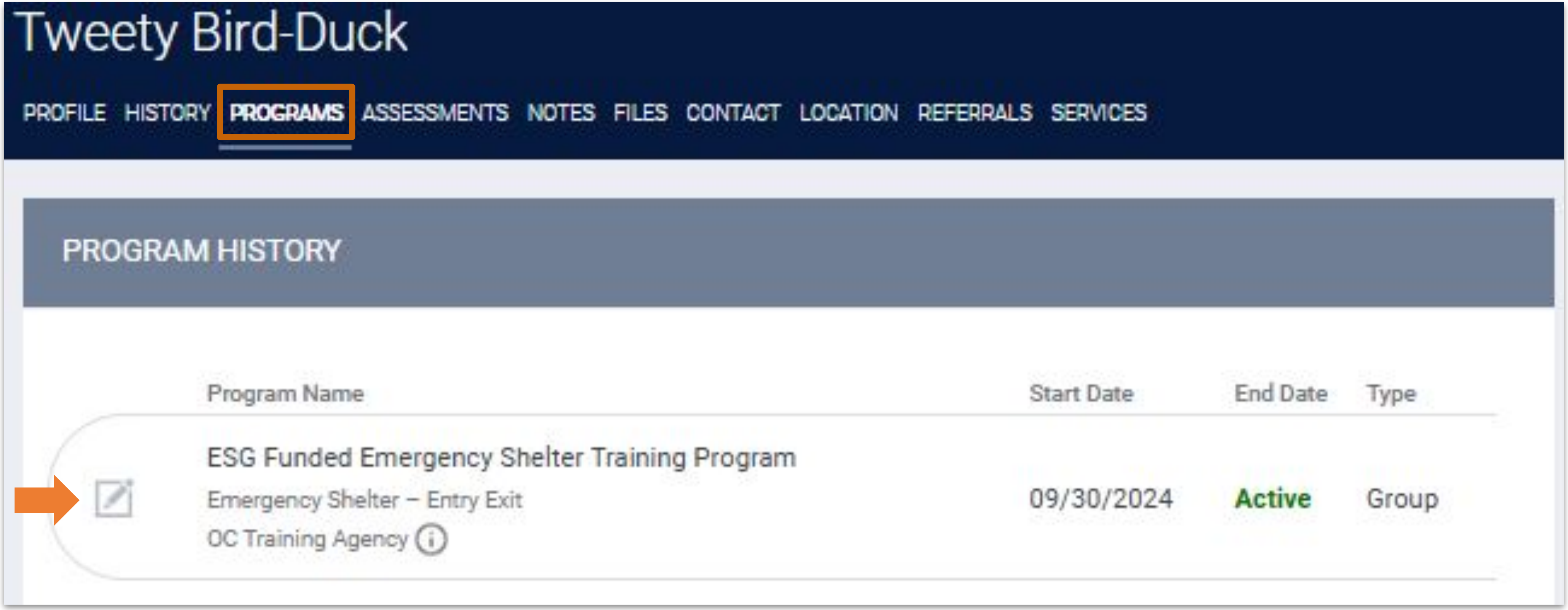
KB: Enrolling Additional Household Members

& Understanding Individual Enrollments and Group Enrollments

Demo: Enrolling Clients Into a Project

Services, Notes and Assessments

Adding Services



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

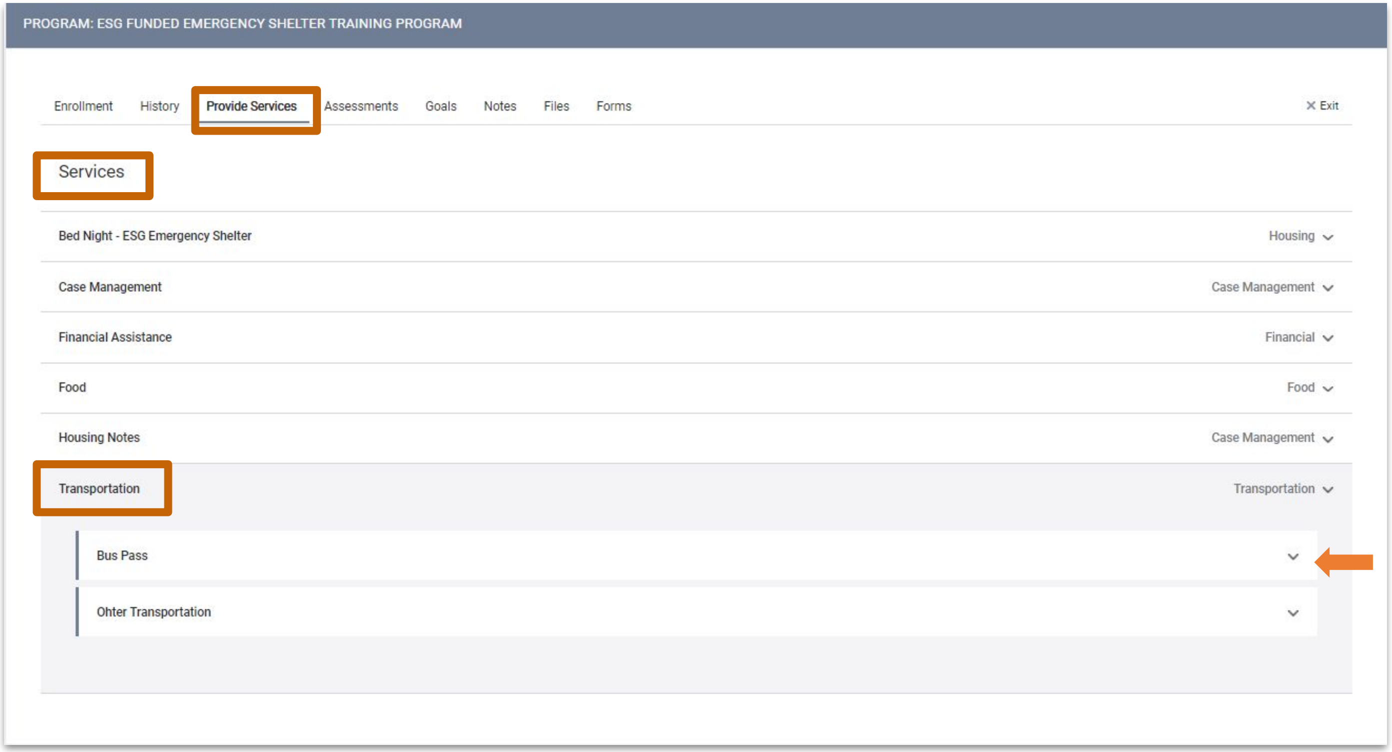
Example: Add Transportation Service

Click on…

Provide Services tab

Select from list of **Services**

And select **Service Item**



Get Connected. Get Help.™

Orange County United Way

Example: Finalize Transportation Service

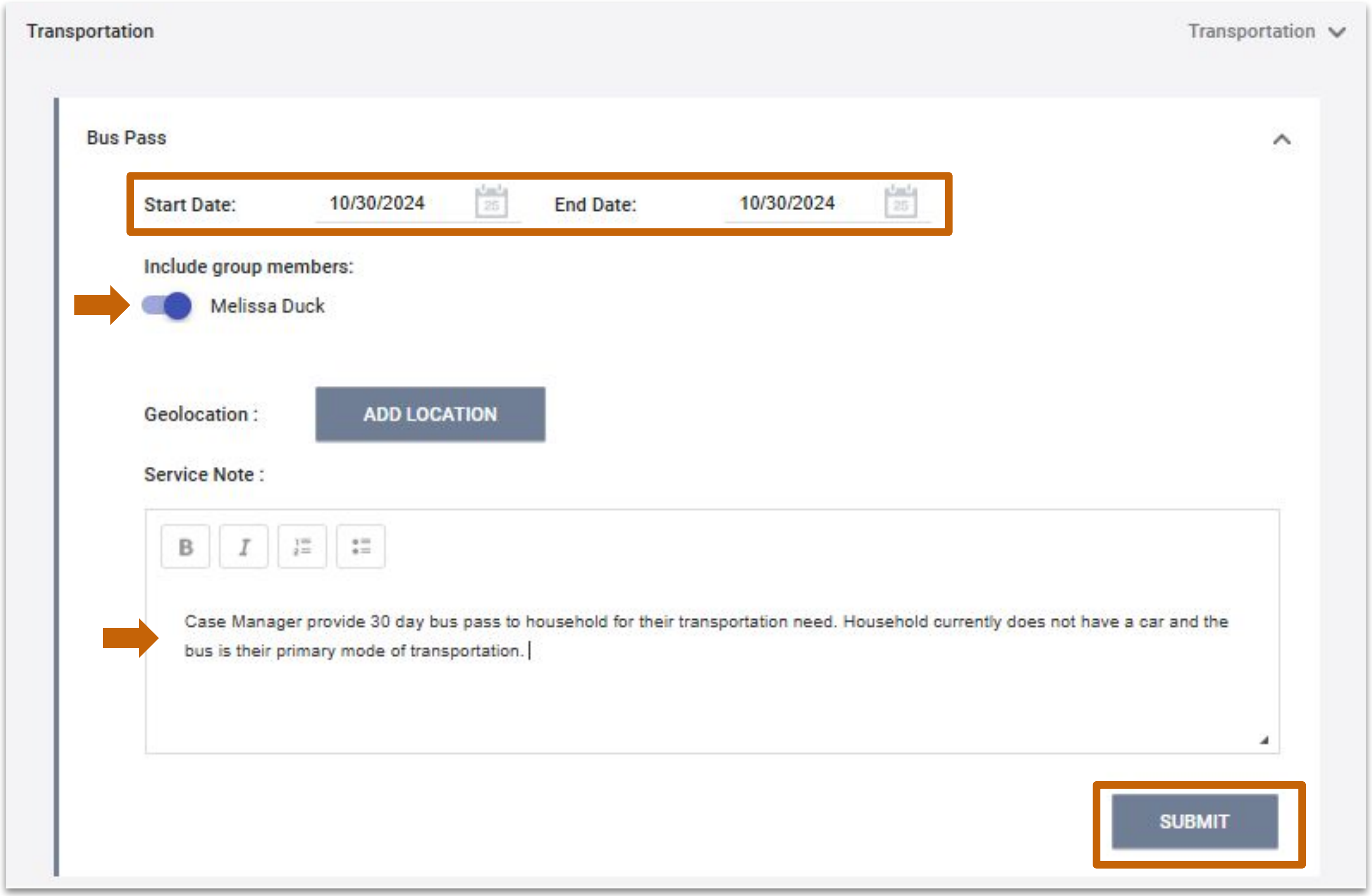
Add in…

Start & End Date

Include **Group Members** if necessary

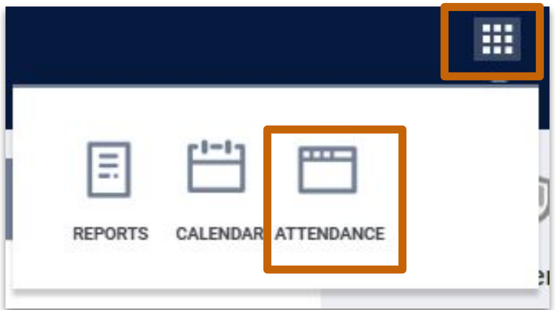
Provide **Service Note**

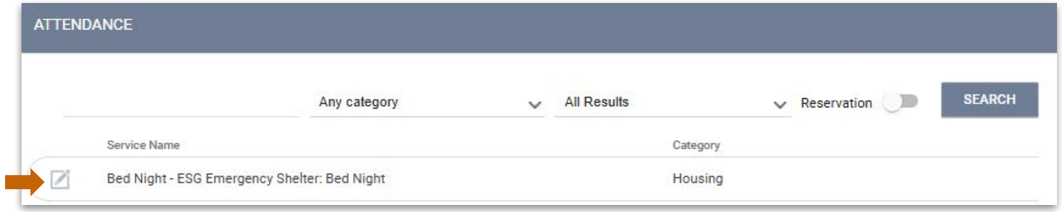
Save!

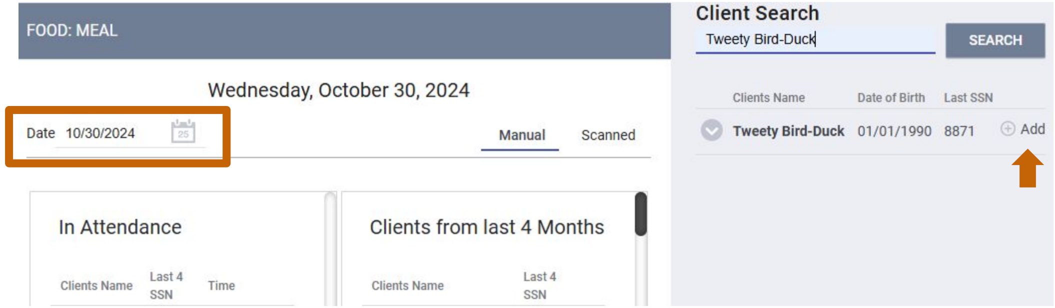


Adding Attendance Based Services

- 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





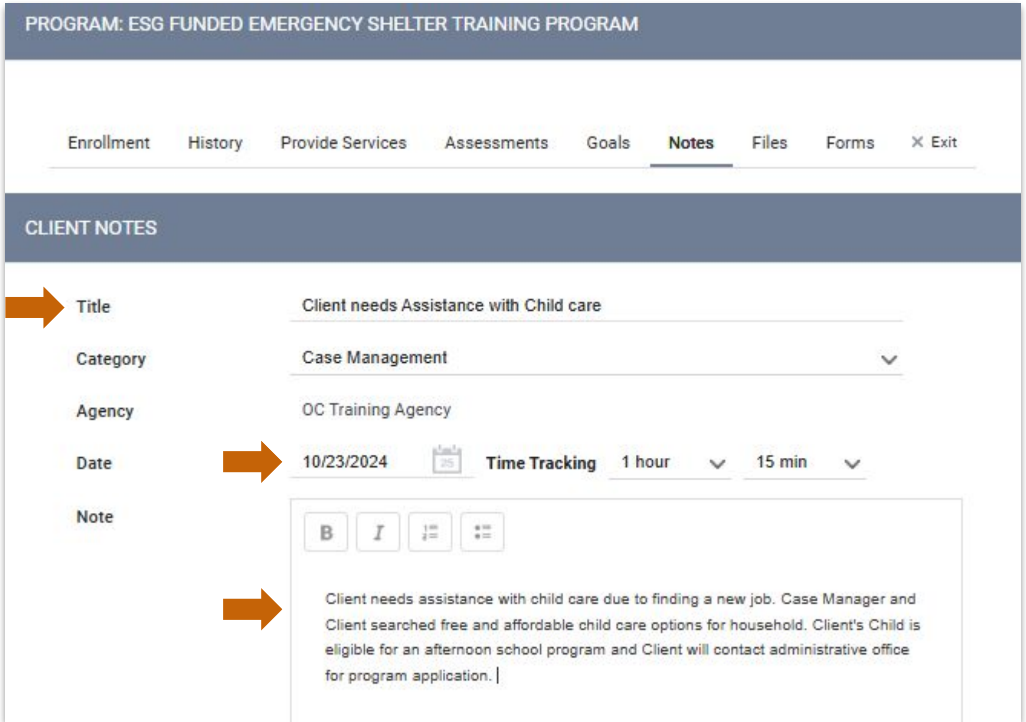


Demo: Services

Case Notes

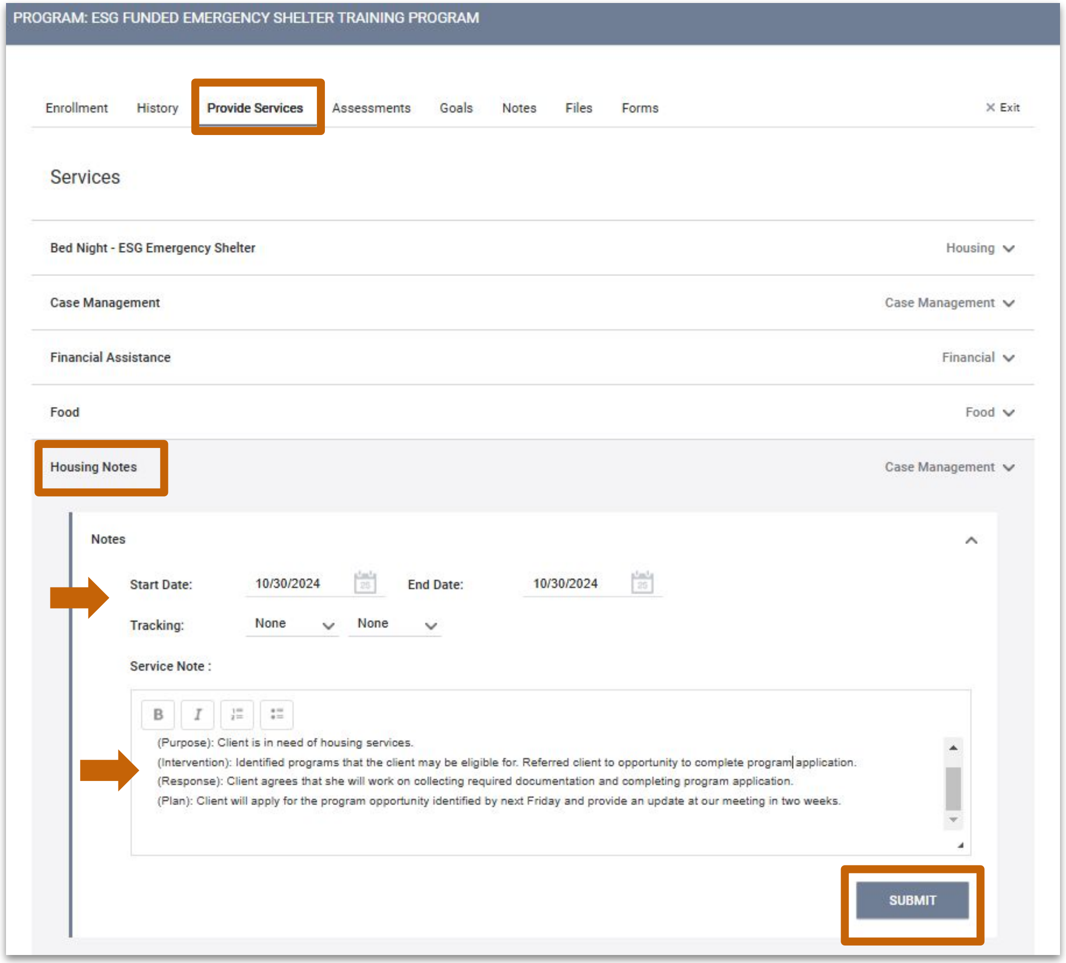
- Navigate to Program Enrollment and click *Notes*
- Click *Add Notes*
- Enter in the *Title* of the Note, when the note was created, enable *Time Tracking* as needed add a description of the note.

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



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]()

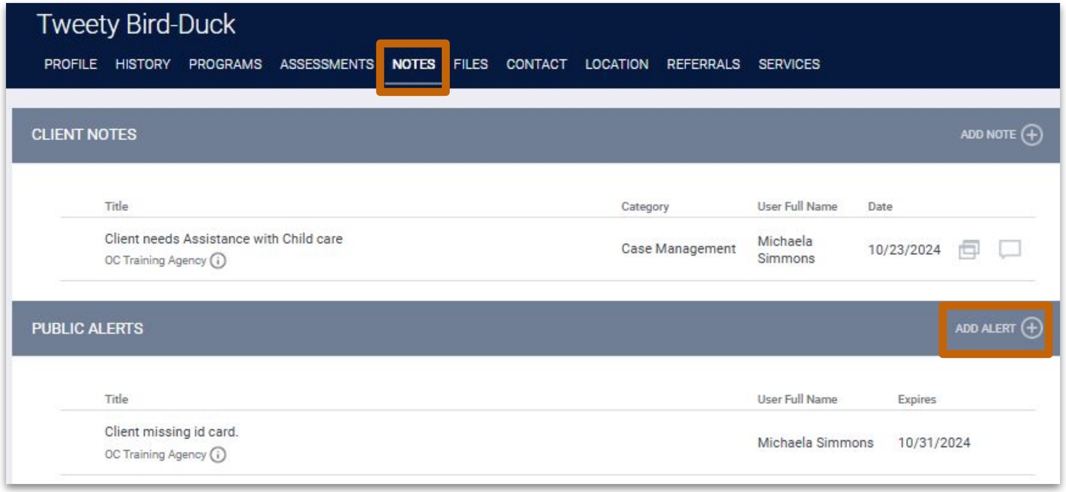
2·1·1
Get Connected. Get Help.™

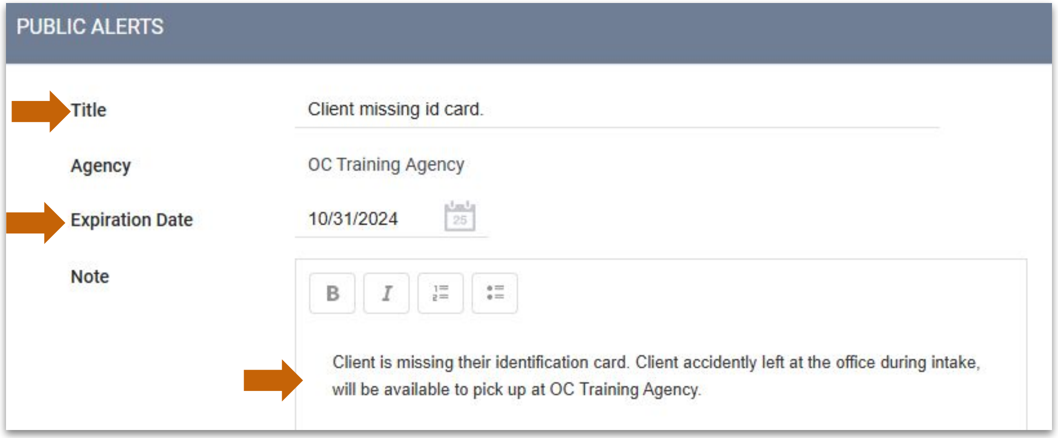
United Way
Orange County United Way

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]()





Demo: Notes and Public Alerts

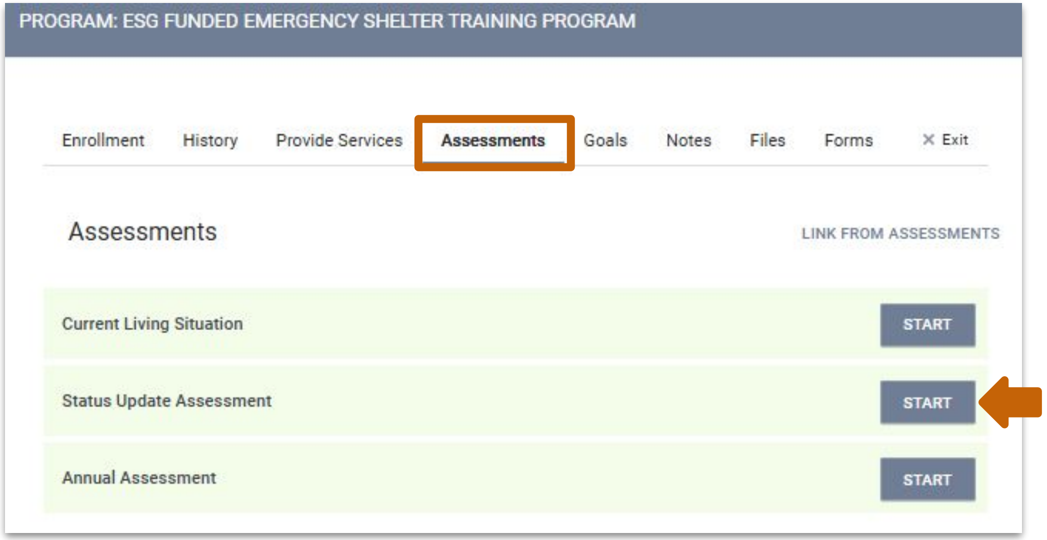
Get Connected. Get Help.™

Orange County United Way

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]



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	

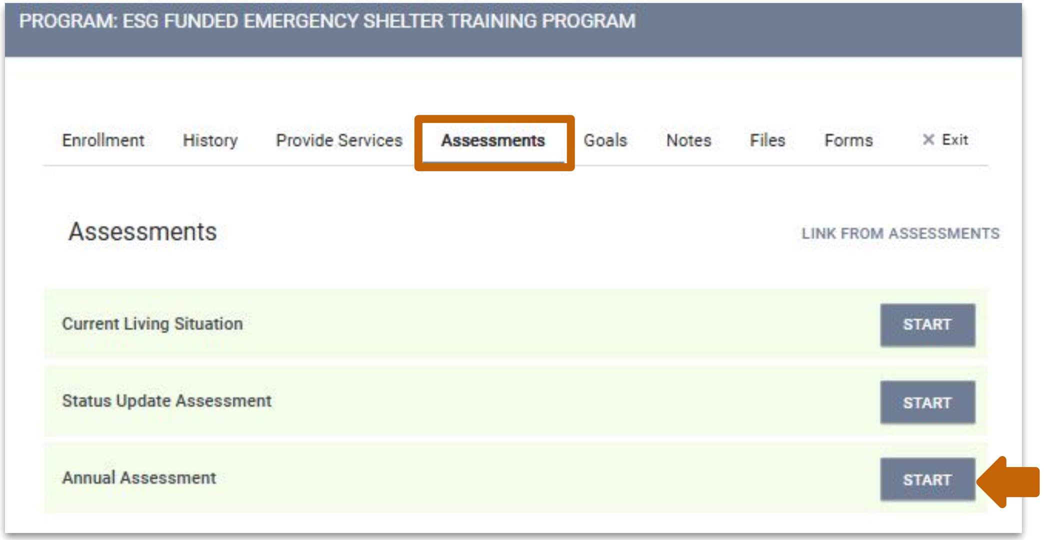
SAVE & CLOSE | CANCEL

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]



Demo: Status and Annual Assessments

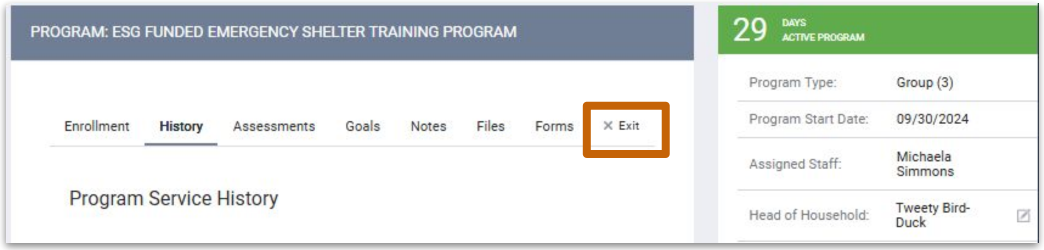
Exiting a Client from a Project

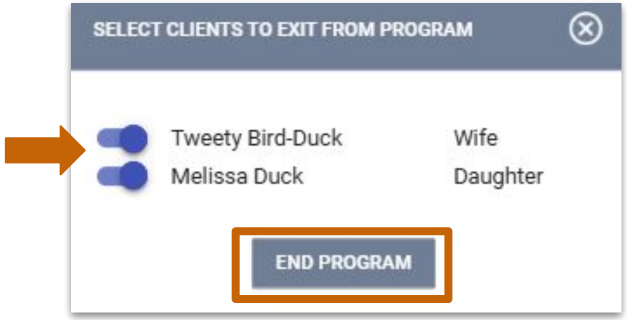
Get Connected. Get Help.™

Orange County United Way

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]

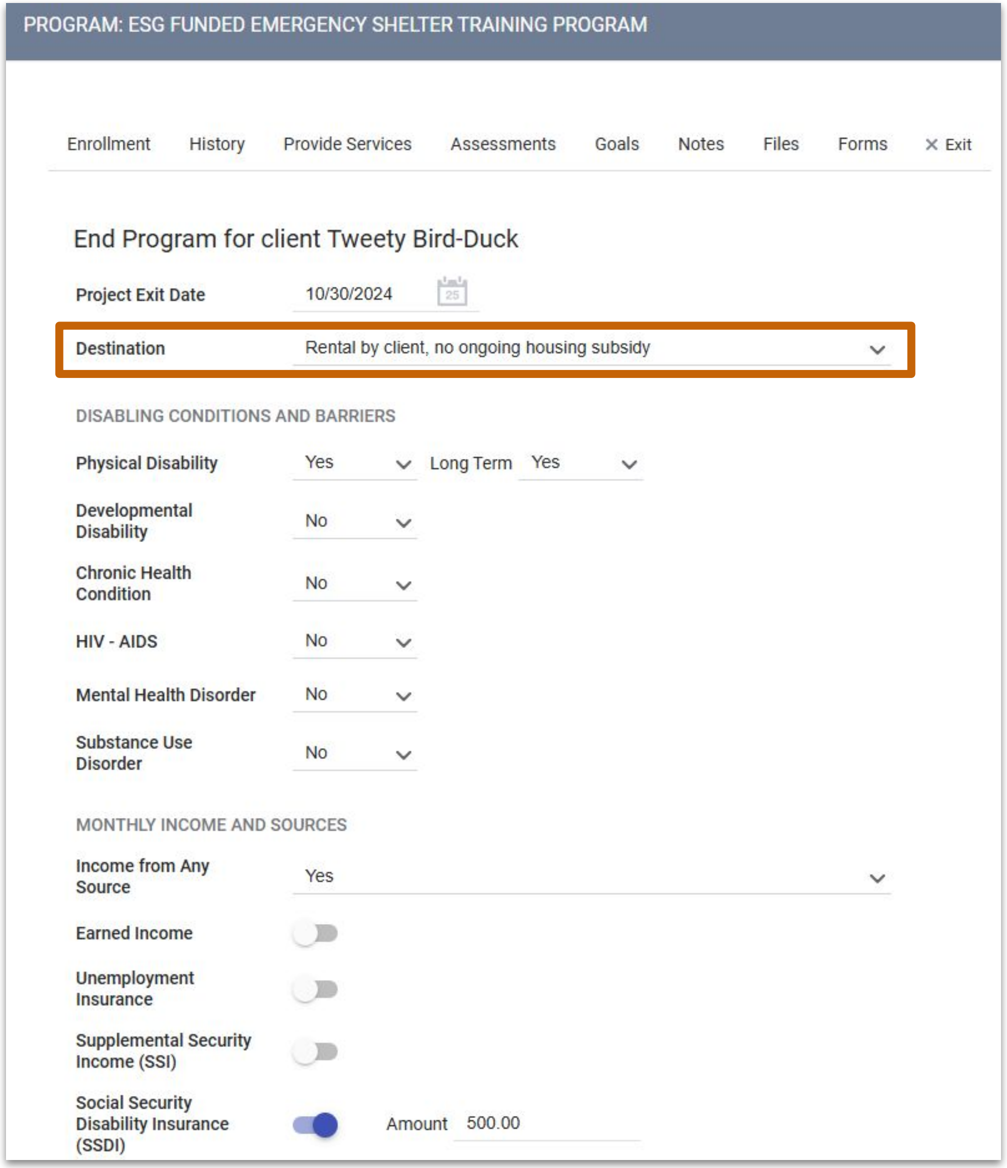
Exiting a Client from a Project

- 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



Demo: Exiting a Client from a Project

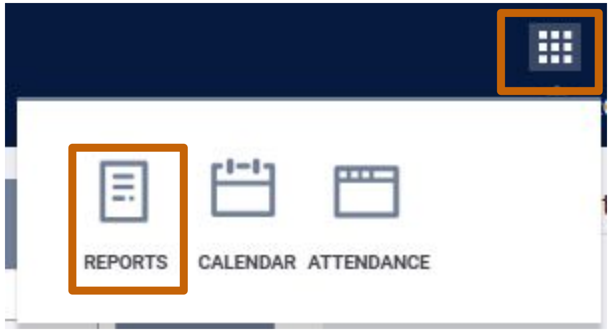
HMIS Reports: Program Roster

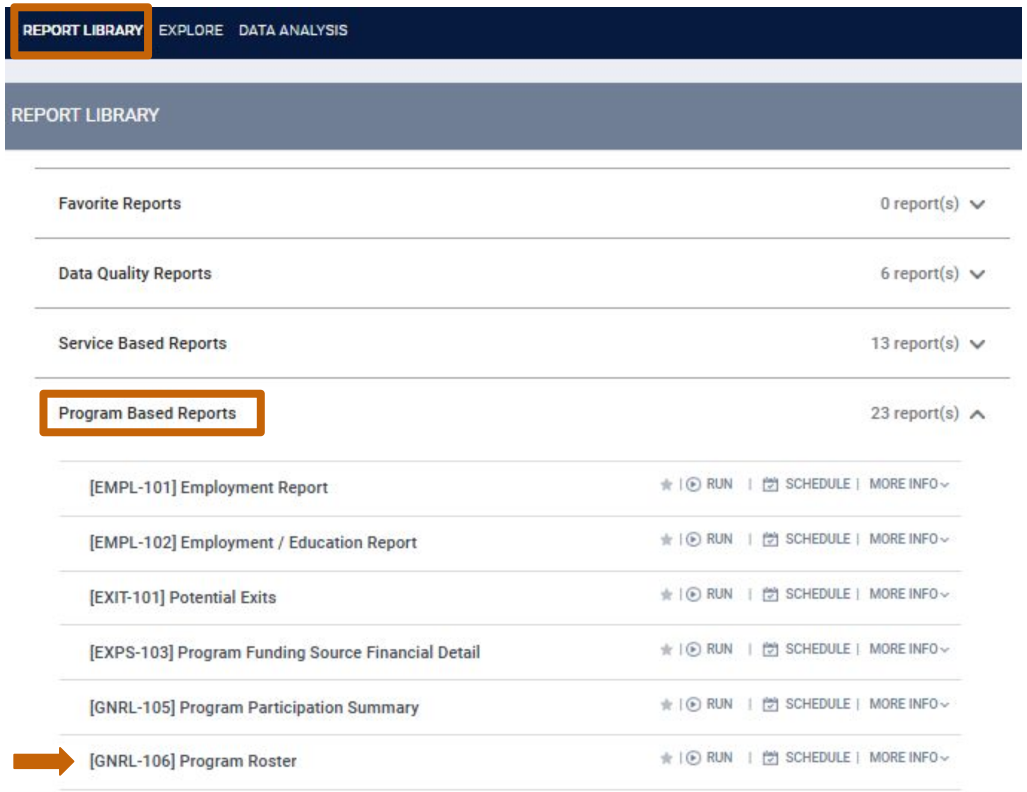
HMIS Reports

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.





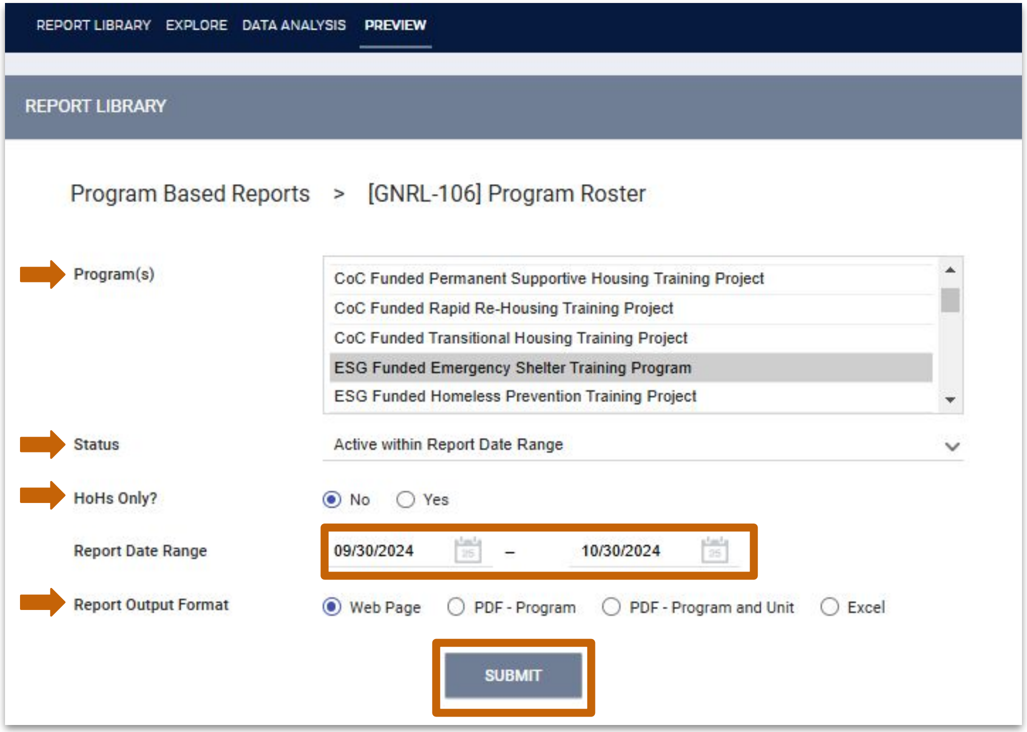
Get Connected. Get Help.™

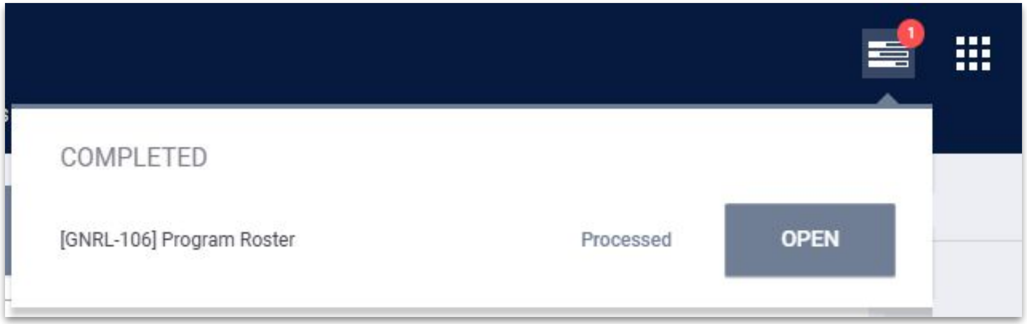
Orange County United Way

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](#)





Program Roster Report

REPORT LIBRARY EXPLORE DATA ANALYSIS SEARCH CASELOAD

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
Program: ESG Funded Emergency Shelter Training Program																

Demo:
Program Roster

2·1·1 Get Connected. Get Help.™

United Way Orange County United Way

Q&A

Our HMIS Helpdesk Team invites users to complete the HMIS Part 2 Survey.

[Survey]

Thank you
Have a great day!

Training materials and recording will be available on the OC HMIS website.

Get Connected. Get Help.™

Orange County United Way

United Way

Orange County United Way