



Get Connected. Get Help.™

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

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>

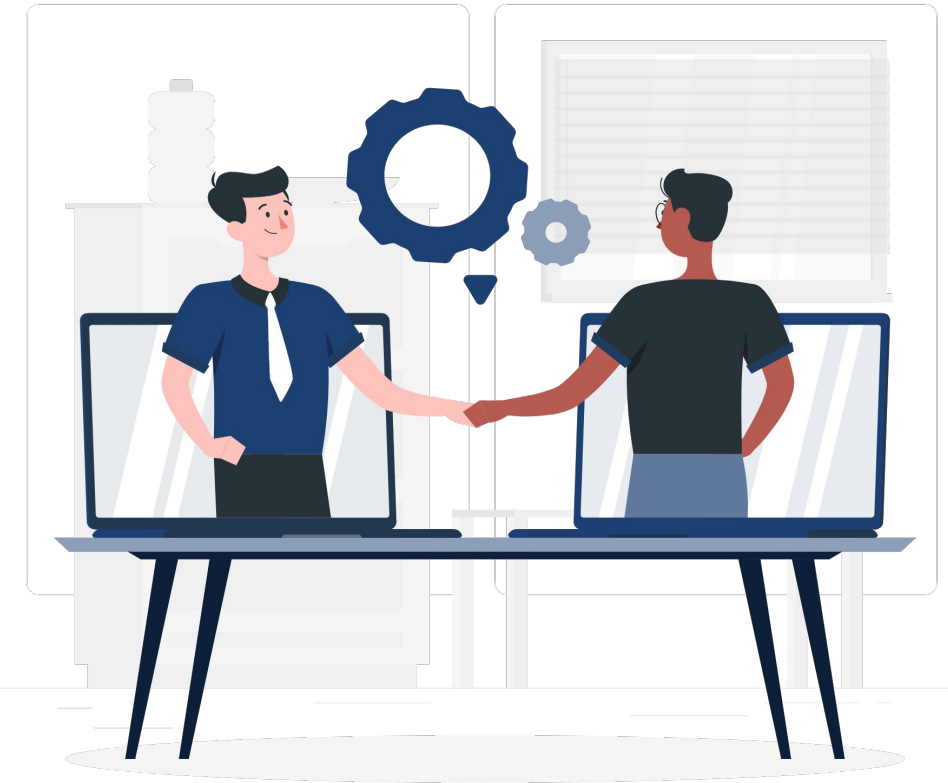
Computer Requirements

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>

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Searching/Creating a Client Profile

Client Search

OC Training Agency

Michaela Simmons, OC Training Agency

SEARCH CASELOAD REFERRALS

SEARCH FOR A CLIENT ADD CLIENT +

Enter search terms for a client SEARCH

Use full name, partial name, date of birth or any combination.

To search a client, please note that you can use any combination of:
name (whole or part first or last name), DOB, SS number

Managed with Clarity Human Services Recover deleted data

Your recent client searches:

- Tweety Bird
- Peyton Arellano
- Jason Bravo
- Johnny Bravo
- 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



UNIQUE IDENTIFIER
B824CE332

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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

25

End Date

10/30/2031

25

Documentation

Select

▼

Select

Electronic Signature

Attached PDF

Verbal Consent

Household

CONSENT REFUSED

Consent Refused

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)



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The Duck Household

Melissa Duck

Head of Household's Child
(Client 2)



Tweety Bird-Duck

Head of Household (HoH)
(Client 1)



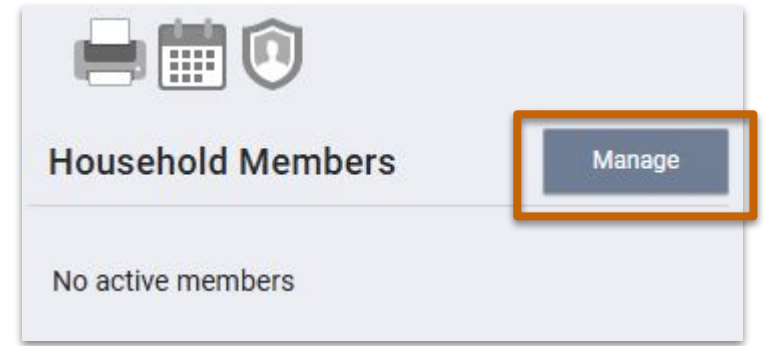
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Global Household

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 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
+ Add 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)



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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
<div><div>➤ Join</div><div>Daffy Duck</div><div>Existing Group. Head of Household: Jonny Testingg. Members: 2</div></div>	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



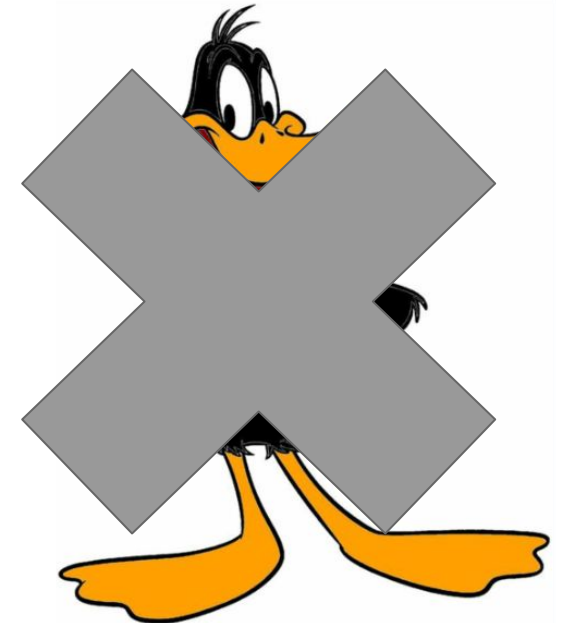
Tweety Bird-Duck

Head of Household (HoH)



Daffy Duck

Head of Household's other
relation member



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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

The image shows a two-step process for exiting a household member. The top screenshot shows the 'Household Members' list with a 'Manage' button highlighted. The bottom screenshot shows the 'EDIT GLOBAL HOUSEHOLD' form with an orange arrow pointing to the 'Edit' icon next to 'Daffy Duck' in the list above. In the form, the 'Exited Household' toggle is turned on (indicated by an orange arrow), and the 'Exit Date' is set to 03/26/2025 (also indicated by an orange arrow). The 'SAVE' button is at the bottom.

Household Members		Manage
Melissa Duck	Daughter	
Daffy Duck	Husband	

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

EDIT GLOBAL HOUSEHOLD [Close]

Member Type	Husband	▼
Head of Household	Tweety Bird-Duck	▼
Joined Household	03/24/2025	📅
Exited Household	<input checked="" type="checkbox"/>	
	03/26/2025	📅

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](#)

The screenshot shows the 'Tweety Bird' web application interface. The top navigation bar includes links for PROFILE, HISTORY, PROGRAMS (highlighted with an orange box), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, REFERRALS, and SERVICES. Below this, the 'PROGRAM HISTORY' section displays a message 'No results found' with an icon of a stack of papers. The 'PROGRAMS: AVAILABLE' section (also highlighted with an orange box) lists several programs, each with a dropdown arrow. An orange arrow points to the 'ESG Funded Emergency Shelter Training Program'.

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 Connecte

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

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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 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

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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"/>

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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

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	

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

Melissa Duck 09/30/2024 Active

Status Assessments

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 ✕ 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 : ADD LOCATION

Service Note :

B I 100% 100%

 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. |

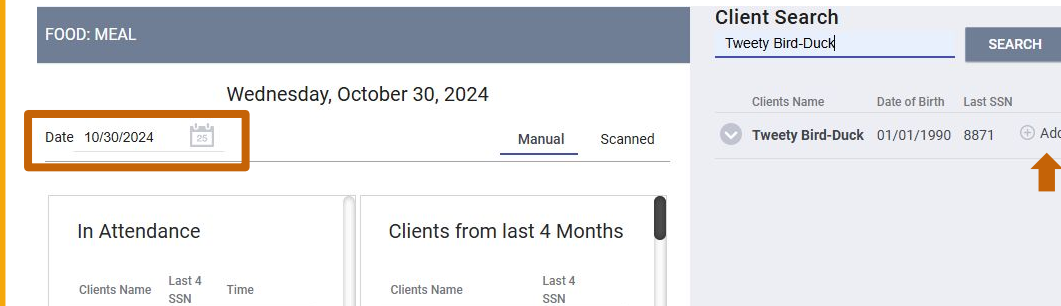
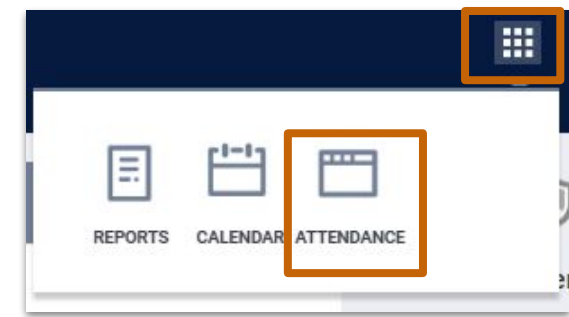
SUBMIT

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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](#)

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

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 ➔

B I [Link] [Image]

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. |

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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

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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 'Tweety Bird-Duck' interface. At the top, there is a navigation bar with tabs: PROFILE, HISTORY, PROGRAMS, ASSESSMENTS, **NOTES** (highlighted with an orange box), FILES, CONTACT, LOCATION, REFERRALS, and SERVICES. Below the navigation bar, there are two sections: 'CLIENT NOTES' and 'PUBLIC ALERTS'. The 'CLIENT NOTES' section has an 'ADD NOTE +' button. It contains a table with columns: Title, Category, User Full Name, and Date. The first row shows 'Client needs Assistance with Child care' under Title, 'OC Training Agency' under Category, 'Michaela Simmons' under User Full Name, and '10/23/2024' under Date. The 'PUBLIC ALERTS' section has an 'ADD ALERT +' button (highlighted with an orange box). It contains a table with columns: Title, User Full Name, and Expires. The first row shows 'Client missing id card.' under Title, 'OC Training Agency' under User Full Name, and '10/31/2024' under Expires.

The screenshot shows the 'PUBLIC ALERTS' form. It has four fields: 'Title' (with an orange arrow pointing to it), 'Agency' (with 'OC Training Agency' entered), 'Expiration Date' (with '10/31/2024' entered and a calendar icon), and 'Note' (with an orange arrow pointing to it). The 'Note' field has a rich text editor with buttons for Bold (B), Italic (I), Bulleted List (1=, 2=), and Numbered List (1=, 2=). The text entered in the 'Note' field is: '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	<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 500.00
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	500.00	

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"/>	
HEALTH INSURANCE		
Covered by Health Insurance	Yes	▼
MEDICAID	<input checked="" type="checkbox"/>	
MEDICARE	<input type="checkbox"/>	
State Children's Health Insurance Program	<input type="checkbox"/>	
Veteran's Health Administration (VHA)	<input type="checkbox"/>	
Employer-Provided Health Insurance	<input type="checkbox"/>	
Health Insurance Obtained Through COBRA	<input type="checkbox"/>	
Private Pay Health Insurance	<input type="checkbox"/>	
State Health Insurance for Adults	<input type="checkbox"/>	
Indian Health Services Program	<input type="checkbox"/>	
Other Health Insurance	<input type="checkbox"/>	

SAVE & CLOSE

CANCEL

2-1-1

Get Connected. Get Help.™

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

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

Program Service History

29 DAYS ACTIVE PROGRAM

Program Type: Group (3)

Program Start Date: 09/30/2024

Assigned Staff: Michaela Simmons

Head of Household: Tweety Bird-Duck ☒

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 determines 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](#)

PROGRAM: ESG FUNDED EMERGENCY SHELTER TRAINING PROGRAM

Enrollment History Provide Services Assessments Goals Notes Files Forms × Exit

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

2-1-1

Get Connected. Get Help.™

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.

The screenshot displays the HMIS Reports interface. At the top, a navigation bar includes 'REPORT LIBRARY', 'EXPLORE', and 'DATA ANALYSIS'. Below this, a 'REPORT LIBRARY' section lists categories: 'Favorite Reports' (0 report(s)), 'Data Quality Reports' (6 report(s)), 'Service Based Reports' (13 report(s)), and 'Program Based Reports' (23 report(s)). The 'Program Based Reports' section is highlighted with an orange box. It lists several reports, each with a star icon, a 'RUN' button, a 'SCHEDULE' button, and a 'MORE INFO' link. The reports listed are: [EMPL-101] Employment Report, [EMPL-102] Employment / Education Report, [EXIT-101] Potential Exits, [EXPS-103] Program Funding Source Financial Detail, [GNRL-105] Program Participation Summary, and [GNRL-106] Program Roster. An orange arrow points to the [GNRL-106] Program Roster report.

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

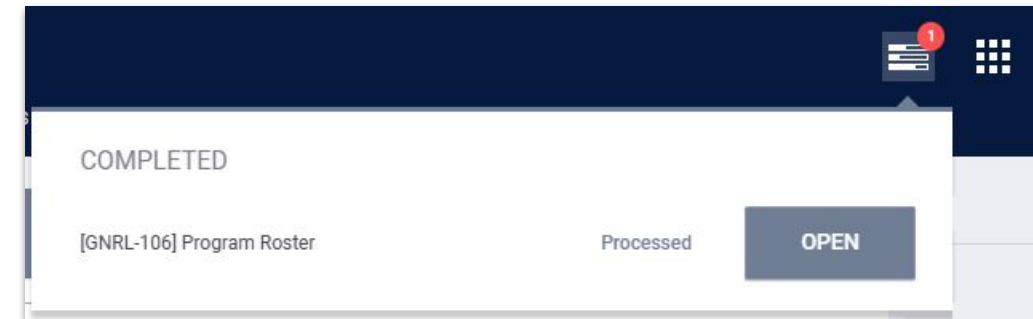
Status Active within Report Date Range

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



Program Roster Report

Program Roster Report	OC Training Agency Active within 09/30/2024 thru 10/30/2024
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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

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](#).

**United
Way**



Orange County United Way