

2018-2019 ESG  
Implementation Workshop  
Street Outreach Introduction

# Purpose of Today's Session

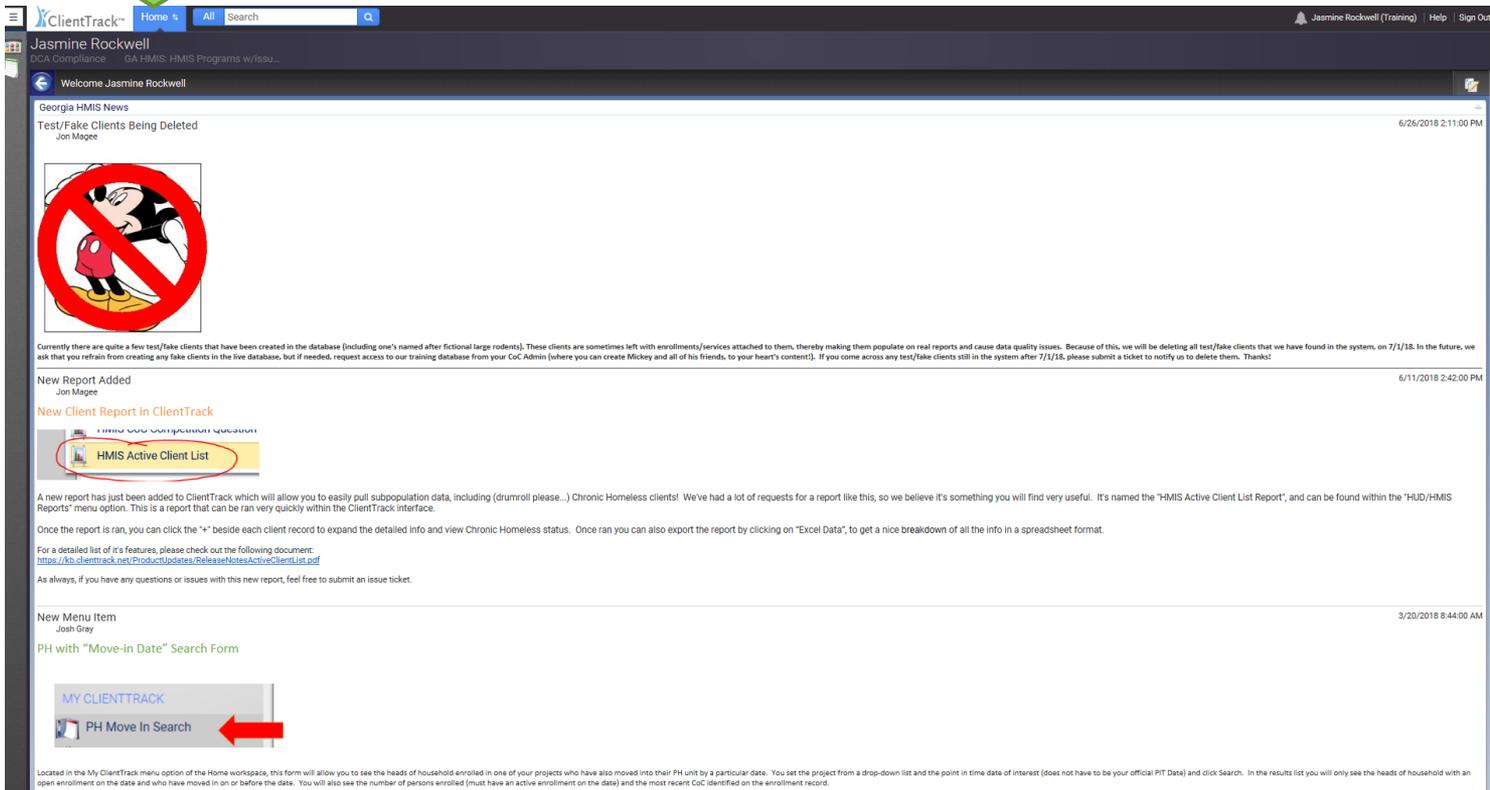
- Introduction
  - Passwords
- Client Search
- Enrollment
- Information release
- Veteran Assessment
- Service & Case Notes
- Discharge
- Current Enrollments
- Data Quality Report
- Data Detail Report
- Questions

# Introduction

- Welcome to the 2018-2019 HMIS ESG Implementation workshop!
- Please save all questions for the end of the session.
- Passwords
  - Do not save your password in your web browser.
  - Please log into HMIS within 90 days or you will be locked out of the system.
    - If this occurs, you will have to retake the HMIS Quiz to regain access to your account.

# Client Search

- Be mindful that the last client you worked with will show when searching for a new client.
- Find a client by pressing the  on the Clients menu.
- Enter all information you have for the client
- If the client is not found then and **ONLY** then create a new client profile. This can be done by selecting Menu → Project Intake → Add a new client



The screenshot displays the ClientTrack web application interface. At the top, there is a navigation bar with 'Home', 'All', and 'Search' options. The main content area shows a news feed with several items:

- Georgia HMIS News:** 'Test/Fake Clients Being Deleted' by Jon Magee, dated 6/26/2018 2:11:00 PM. It features a cartoon image of Mickey Mouse with a red circle and slash over it.
- New Report Added:** 'New Client Report in ClientTrack' by Jon Magee, dated 6/11/2018 2:42:00 PM. It includes a link to 'HMIS Active Client List'.
- New Menu Item:** 'PH with "Move-in Date" Search Form' by Josh Gray, dated 3/20/2018 8:44:00 AM. It features a button labeled 'PH Move In Search' with a red arrow pointing to it.

At the bottom of the page, there is a small text block providing details about the 'PH Move In Search' form.

# Client Search Cont'd

HOME

Jasmine Rockwell  
DCA Compliance  
GA HMIS: HMIS Programs

CLIENTS

Bob Barker  
2/2/1972  
407259

A green arrow points from the CLIENTS card to the right.

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search

First Name: James  
Last Name: Jackson  
Middle Name:   
Full Name (Last, First):   
Social Security Number: 777 - 77 - 7777  
Birth Date: 01/07/1977  
Client ID:   
Pathways ID:

No records found.

First Name ▲ Last Name ▲ Middle Name ▲ SSN Birth Date ▲ Client ID ▼ Pathways ID ▲

A green arrow points from the search form to the right.

Intake (1259)

|| X

Do you want to add a new client or use the selected client?

- Add or Edit
- Basic Client Information
- Family Members
- Program Enrollment

Use the current client

Select another client

# Enrollment – Client Information

- ❑ Clients should be enrolled within 48 hours.
- ❑ The head of household must be listed as “self”.

James Jackson  
1/7/1977

Intake (1259)

- Basic Client Information
- Family Members
- Program Enrollment

Client Information

Search Existing Clients

Basic Client Information

**BASIC CLIENT INFORMATION** ?

Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.

First Name: \* James

Last Name: \* Jackson

Middle Name: \*

Suffix: \*

Name Quality: \* Full name reported

Social Security Number: \* 777 - 77 - 7777

SSN Quality: \*  Full SSN  
 Approximate or partial SSN reported  
 Client doesn't know  
 Client Refused  
 Data not collected

**Basic Client Demographics**

Birth Date: \* 01/07/1977

Client Age: 41

Date of Birth Quality: \*  Full DOB Reported  
 Approximate or Partial DOB Reported  
 Client doesn't know  
 Client refused  
 Data not collected

Ethnicity: \* Non-Hispanic/Latino

Race: \* American Indian or Alaska Native  
Asian  
 Black or African American  
Native Hawaiian or Other Pacific Islander  
White  
Client doesn't know

Gender: \* Male

Veteran Status: \* Yes

Show Address and Contact Information:

**Family Information** - Use this section to collect data about a client's family. The Family search field allows you to search for and select an existing family account. This is appropriate when adding a family member to an existing family.

Family: \*

Relationship to Head of Household: \* Self

Previous Finish

# Enrollment Cont'd – Family Members

- After selecting finish, you will be taken to the family members screen. If the HOH has additional family members, you can enter them by checking the box and filling in their information. When complete, save and close.

The screenshot shows a web-based interface for managing family members. At the top, there is a navigation bar with a back arrow and the title "Family Members". Below this, a message states: "The selected client's family members are displayed below. You may search for existing clients to add to this family or add new clients to the database and associate them with this family." A second message explains: "It's important to note that family members are the people who the client is related to. Family isn't always the same as a client's household. According to HUD '[a] household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed.)' (Data Manual)" A third message says: "This workflow will allow you to enroll all family members or select which family members you want to enroll." Below the messages, there is a table with columns for First Name, Middle Name, Last Name, Suffix, Name Quality, Birth Date, Age, Birth Date Quality, Gender, SSN, and SSN Quality. The table contains one row for a family member named James Jackson, with a checked checkbox in the first column. The birth date is 01/07/1977, age is 41, and gender is Male. The SSN is 777-77-7777. Below the table, there are buttons for "Save" and "Save & Close".

Family Members

The selected client's family members are displayed below. You may search for existing clients to add to this family or add new clients to the database and associate them with this family.

It's important to note that family members are the people who the client is related to. Family isn't always the same as a client's household. According to HUD "[a] household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed.)" (Data Manual)

This workflow will allow you to enroll all family members or select which family members you want to enroll.

1 result found (+1).

<input type="checkbox"/>	First Name	Middle Name	Last Name	Suffix	Name Quality	Birth Date	Age	Birth Date Quality	Gender	SSN	SSN Quality
<input checked="" type="checkbox"/>	James		Jackson		Full name reported	01/07/1977	41	Full DOB Reported	Male	777-77-7777	
<input type="checkbox"/>					-- SELECT --		N/A	-- SELECT --	-- SELECT --		-- SELECT --

Save Save & Close

# Enrollment Cont'd – HUD Program Enrollment

- ❑ Select the correct program to enroll the client into.
- ❑ The Date of Engagement is required.

The screenshot shows the HUD Program Enrollment form. The top section is titled "HUD Program Enrollment" and includes instructions: "Select the Project you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling." Below this, the "Project Start Date" is defined, and a list of project types is provided: Street Outreach projects, Emergency Shelters, Safe Havens and Transitional Housing, and Permanent Housing (including Rapid Re-Housing). The form includes a "Project" dropdown menu currently set to "SELECT...", a "Restriction" section with radio buttons for "Restrict to Organization" and "Restrict to MOU/Info Release", and a "Save" button.

A large green arrow points from the "Project" dropdown in the top screenshot to the "Project" dropdown in the bottom screenshot, which is set to "ESG - SO - 501".

The bottom screenshot shows a table of client data with the following columns: Name, Gender, Age, Project Start Date, Case Manager, Relationship to Head of Household, and Date of Engagement. The table contains one entry for "Smith, Tony" with a checkmark in the selection column.

<input type="checkbox"/>	Name	Gender	Age	Project Start Date	Case Manager	Relationship to Head of Household	Date of Engagement
<input checked="" type="checkbox"/>	Smith, Tony	Male	33	09/05/2018	Jasmine Rockwell	Self	09/05/2018

Below the table, the "Restriction" section is visible, with "Restrict to MOU/Info Release" selected. A "Save" button is located at the bottom right of the form.

# Enrollment Cont'd – Universal Data Assessment

Universal Data Assessment

Default Client's Last Assessment

Assessment Date: 09/05/2018

Age at Assessment: 32

Assessment Type: Entry

Assessor: Jasmine Rockwell

Program: ESG - SO - 501

Disabling Condition: Yes

Client Location - Select or enter the CoC code assigned to the geographic area where the head of household is staying at the time of project entry. Client location will be defaulted to the program's CoC within a workflow.

Client Location: GA-501 - Georgia Balance of State CoC

Living Situation - Identify the type of residence and length of stay at that residence just prior to (i.e., the night before) program admission.

Type of Residence: Place not meant for habitation

Length of stay in prior living situation: One week or more, but less than one month

Approximate date homelessness started: 08/16/2018

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: One time

Total number of months homeless on the street, in ES, or SH in the past three years: One month (this time is the first month)

Health Insurance - Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.

Covered by Health Insurance: Yes

Default Last Insurance Status

Type	Status	Reason No	Other Coverage
Private	No	-- SELECT --	
Private - Employer	No	-- SELECT --	
Private - Individual	No	-- SELECT --	
Medicare	No	-- SELECT --	
Medicaid	No	-- SELECT --	
State Children's Health Insurance Program S-CHIP	No	-- SELECT --	
Military Insurance	Yes		
State Funded	No	-- SELECT --	
Combined Children's Health Insurance / Medicaid Program	No	-- SELECT --	
Indian Health Service (IHS)	No	-- SELECT --	
Health insurance obtained through COBRA	No	-- SELECT --	
Other Public	No	-- SELECT --	

Restriction:  Restrict to Organization  Restrict to MOU/Info Release

Save

# Enrollment Cont'd - Barriers

Barriers

Use this form to identify whether a client has each individual barrier or not. The Client's last assessment is displayed as a default. You may, optionally, click **Previous Barriers Detail** to view information about the defaulted records or click **View Barrier History** to review all previous barriers.

[View Barrier History](#)

Assessment Active

Identified Date: 08/15/2018  
Screen: HMIS Barriers  
Disabling Condition: Yes

Barrier	Help	Barrier Present?	Condition is Indefinite	Explanation	Previous Barrier Details
<input checked="" type="checkbox"/> Alcohol Abuse		No			<input checked="" type="checkbox"/> <a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Chronic Health Condition		No			<input checked="" type="checkbox"/> <a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Developmental Disability		No			<input checked="" type="checkbox"/> <a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Drug Abuse		No			<input checked="" type="checkbox"/> <a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> HIV/AIDS		No			<input checked="" type="checkbox"/> <a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Mental Health		No			<input checked="" type="checkbox"/> <a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Physical Disability		Yes	Yes		<input checked="" type="checkbox"/> <a href="#">Previous Barrier</a>

Save Save & Close

# Enrollment Cont'd – Domestic Violence Assessment

← Universal Data Assessment + Domestic Violence Assessment

If the client has been a victim of domestic violence, select Yes for Domestic Violence Experience, and select when the experience occurred.

Default Client's Last Assessment ↕

Assessment Active

Assessment Date: 08/15/2018 📅

Domestic Violence Experience: \*

- Yes
- No
- Client doesn't know
- Client refused
- Data Not Collected

When Experience Occurred: \* -- SELECT -- ▾

Currently Fleeing: \* -- SELECT -- ▾

Restriction:

- Restrict to Organization ?
- Restrict to MOU/Info Release

← Universal Data Assessment + Domestic Violence Assessment

If the client has been a victim of domestic violence, select Yes for Domestic Violence Experience, and select when the experience occurred.

Default Client's Last Assessment ↕

Assessment Active

Assessment Date: 08/15/2018 📅

Domestic Violence Experience: \*

- Yes
- No
- Client doesn't know
- Client refused
- Data Not Collected

Restriction:

- Restrict to Organization ?
- Restrict to MOU/Info Release

# Enrollment Cont'd – Income and Sources, Non-Cash Benefits

Assessment Date: \* 08/21/2018

Income from Any Source: \* Yes

Non-Cash Benefits from Any Source: \* Yes

Expenses: --SELECT--

**Income**

Type	Description	Monthly Amount	Restriction
<input checked="" type="checkbox"/>	Earned Income (i.e., employment income)	\$500.00	Restrict to MOU/Info Release
<input type="checkbox"/>	Unemployment Insurance		Restrict to MOU/Info Release
<input type="checkbox"/>	Supplemental Security Income (SSI)		Restrict to MOU/Info Release
<input type="checkbox"/>	Social Security Disability Insurance (SSDI)		Restrict to MOU/Info Release
<input type="checkbox"/>	Veteran's Disability Payment		Restrict to MOU/Info Release
<input type="checkbox"/>	Private Disability Insurance		Restrict to MOU/Info Release
<input type="checkbox"/>	Worker's Compensation		Restrict to MOU/Info Release
<input type="checkbox"/>	Temporary Assistance for Needy Families (TANF)		Restrict to MOU/Info Release
<input type="checkbox"/>	General Assistance		Restrict to MOU/Info Release
<input type="checkbox"/>	Retirement income from Social Security		Restrict to MOU/Info Release
<input type="checkbox"/>	Veteran's Pension		Restrict to MOU/Info Release
<input type="checkbox"/>	Other Pension		Restrict to MOU/Info Release
<input type="checkbox"/>	Child Support		Restrict to MOU/Info Release
<input type="checkbox"/>	Alimony or other spousal support		Restrict to MOU/Info Release
<input type="checkbox"/>	Other Income		Restrict to MOU/Info Release
Count/Total Monthly Income:		1	\$500.00

**Non-Cash Benefits**

Type	Description	Monthly Amount	Restriction
<input checked="" type="checkbox"/>	Supplemental Nutrition Assistance Program (SNAP) (Food Stamps)	\$190.00	Restrict to MOU/Info Release
<input type="checkbox"/>	Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)		Restrict to MOU/Info Release
<input type="checkbox"/>	TANF Child Care Services		Restrict to MOU/Info Release
<input type="checkbox"/>	TANF Transportation Services		Restrict to MOU/Info Release
<input type="checkbox"/>	Other TANF-funded Services		Restrict to MOU/Info Release
<input type="checkbox"/>	Other Source		Restrict to MOU/Info Release
<input type="checkbox"/>	Section 8, Public Housing, or Other Ongoing Rental Assistance <sup>1</sup>		Restrict to MOU/Info Release
<input type="checkbox"/>	Temporary rental assistance <sup>1</sup>		Restrict to MOU/Info Release
Count/Total Monthly Income:		1	\$190.00

<sup>1</sup> Deprecated in 2017 (HMIS v6.1)

Restriction: \*  Restrict to Organization   
 Restrict to MOU/Info Release

# Enrollment Cont'd - Contact

  Contact  

The HMIS Data Standards manual defines a contact "as an interaction between a worker and a client. Contacts may range from simple a verbal conversation between the street outreach worker and the client about the client's well-being or needs or may be a referral to service."

Assessment Active

Date of Contact: \* 09/05/2018 

Contact with: Jasmine Rockwell 

Enrollment: \* 09/05/2018 - ESG - SO - 501 

Contact Service: \* Outreach 

Staying on Streets, ES or SH: \* Yes 

Exact geographic location: POINT(-84.342429 33.82710) 

Alter Units:  

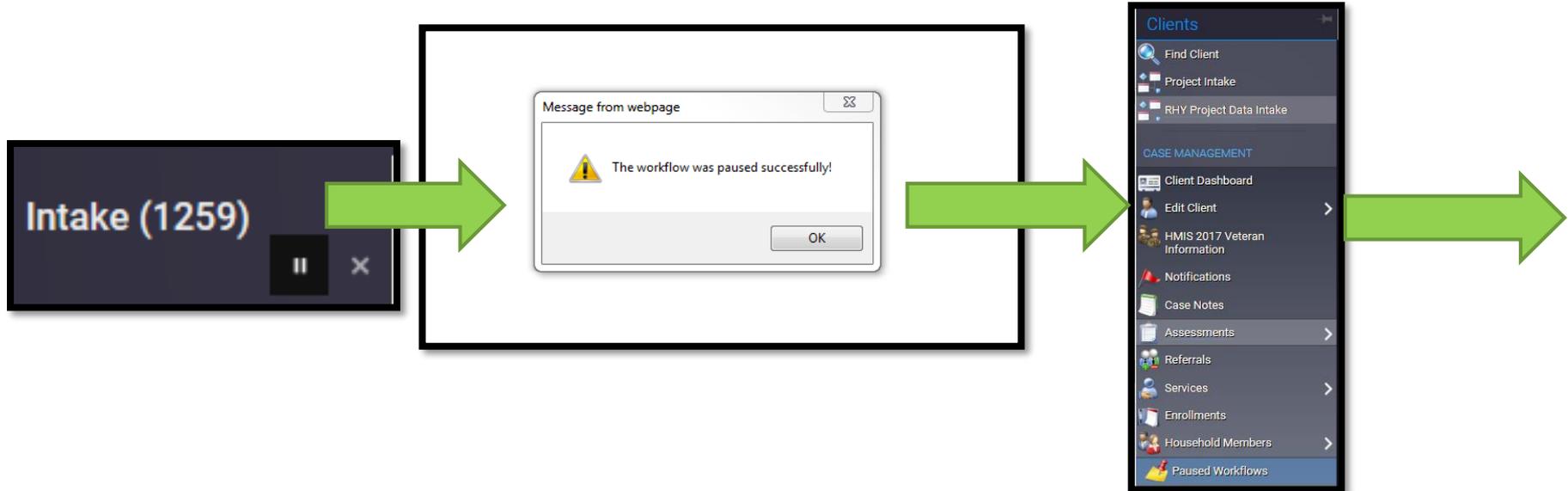
Comments:

Restriction: \*  Restrict to Organization   
 Restrict to MOU/Info Release



 Save

# Enrollment Cont'd – Pause/Finish



Client Paused Workflows

Displayed below are the workflows that have been started for this client. To resume a workflow, choose the **Resume** option. The **Restart** option will open the workflow as if you just started it, but will bring up the data you already entered.

Workflow:

Show Finished:

1 result found.

Workflow	Description	Started	Accessed
HMIS 2014 Program Data	Smith, Billy	08/21/2018	08/21/2018 7:56AM

# Enrollment Cont'd – Finish

You're done!

All required steps have been completed.

→ Finish  
Close the workflow

# Information Release

- To locate the information release go to the client screen → Edit client → Information Release

Information Release and Security

To share the client's data with other organizations through an existing Information Release agreement, select "Consent to share basic identifying information and shared project data" option. "Client Created Date" is date the client record was first created. "Last Date Verified" is the last date this information release was changed or confirmed by clicking "Save" on this form - Select Page Help (?) for more information.

Assign the client-level Security Restriction.

- **Restrict to my organization** will cut off the client record from all other organizations in the system. Only the agency that created the client record will be able to search for and use this record. Be sure to record the unique ClientID for your records and internal use.
- **Consent to share basic identifying information and shared project data** allows other agencies to see transactions the client has consented to share. Protected agency data, case notes, and special needs information are never shared by default.
- **Consent to share basic identifying information only** allows Georgia HMIS Users to search and use basic identifying and demographic information for this client record. No transactional data is shared outside of your organization. This is the default client record sharing setting.

Information Release #:

Client Created Date: 8/9/2018

Last Date Verified: 8/9/2018

Restriction: \*

- Restrict to my organization
- Consent to share basic identifying information and shared project data
- Consent to share basic identifying information only

Signature:

[Clear Signature](#) [Use Topaz Signature Pad](#)

# Veteran Assessment

- Client screen → HMIS 2017 Veteran Information
- Veteran information can be found on the client's DD214

**Veteran Information**

The Veteran information is used to collect details about the veteran's service.

**Branch and Discharge Status** - Please select the branch and discharge status. The HMIS Data Manual provides the following instructions for veterans serving in more than one branch\* For veterans who served in more than one branch of the military, select the branch in which the veteran spent the most time. In the event that a client's discharge status is upgraded during enrollment, the record should be edited to reflect the change.\*

Branch of the Military:\*

Discharge Status:\*

**Military Service Dates** - In the interest of data quality ClientTrack provides date fields and encourages users to enter exact dates if possible. If not, use the first of the year or another standard date determined by your organization. For HMIS purposes, ClientTrack will always calculate years of military service only using year.

Service Entry Date:\*

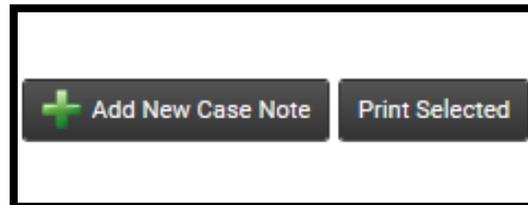
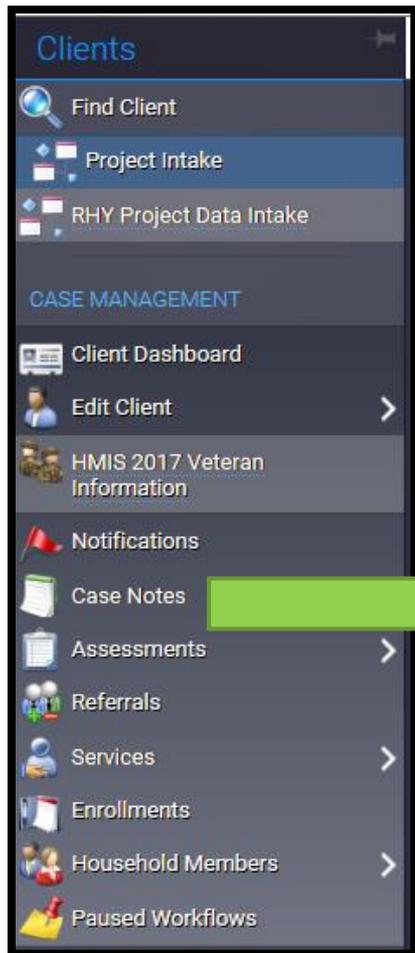
Service Exit Date:\*

<input checked="" type="checkbox"/> Please Select Theatre(s) of Operation(s) ▲	Status* ▲	
<input checked="" type="checkbox"/> Theatre of Operations: World War II	<input type="text" value="No"/>	
<input checked="" type="checkbox"/> Theatre of Operations: Vietnam War	<input type="text" value="No"/>	
<input checked="" type="checkbox"/> Theatre of Operations: Persian Gulf War (Operation Desert Storm)	<input type="text" value="No"/>	
<input checked="" type="checkbox"/> Theatre of Operations: Afghanistan (Operation Enduring Freedom)	<input type="text" value="No"/>	
<input checked="" type="checkbox"/> Theatre of Operations: Iraq (Operation Iraqi Freedom)	<input type="text" value="No"/>	
<input checked="" type="checkbox"/> Theatre of Operations: Iraq (Operation New Dawn)	<input type="text" value="No"/>	
<input checked="" type="checkbox"/> Theatre of Operations: Other Peace-keeping Operations or Military Interventions (such as Lebanon, Panama, Somalia, Bosnia, Kosovo)	<input type="text" value="No"/>	
<input checked="" type="checkbox"/> Theatre of Operations: Korean War	<input type="text" value="No"/>	

# Service & Case Notes

- Every service note should be tied to a case note and vice versa.
- Service notes will be the **ONLY** way services will count. For example, stating a client received a bus ticket in a case note will not count for a reimbursement. There must be a service note with the cost of the bus ticket.
- When providing case management services, the unit should be 1 and the value should be \$0.00.

# Service & Case Notes Cont'd



# Service & Case Notes Cont'd

Intake Case Note with Services

Complete case note **Entry Date**. Verify the **User** recording the note. Enter a brief title or description for the note in **Regarding**. Complete the case note in the text editor field. If **Read Only** is checked, no one will be able to delete or edit the case note unless the read only checkbox has been unchecked. Record services associated with this case note using the lower portion of the form.

Entry Date: 09/05/2018  
 User: Jasmine Rockwell  
 Regarding: Intake  
 Note Type: --SELECT--

**Case Note**

Client Name: Tony Smith

Tony Smith was enrolled today by this CM.

Read Only:

**Services** - Use the fields below to record the services provided in association with the note above.

Default Enrollment: --SELECT--

	Enrollment*	Grant*	Service*	Units Of Measure*	Unit Value*	Units*	Total	Staying on Streets, ES or SH*	Restriction
<input checked="" type="checkbox"/>	09/05/2018 - ESG - SO - 501	ESG - SO - 501	ESG - Case Management	Count	\$0.00	1.00	\$0.00		Restrict to MOU/Info Release
<input type="checkbox"/>	--SELECT--	--SELECT--	--SELECT--	--SELECT--			\$0.00		--SELECT--



# Service & Case Notes Cont'd

**Clients**

- Find Client
- Project Intake
- RHY Project Data Intake
- CASE MANAGEMENT**
- Client Dashboard
- Edit Client
- HMIS 2017 Veteran Information
- Notifications
- Case Notes
- Assessments
- Referrals
- Services
- Enrollments
- Household Members
- Paused Workflows

**Add New** **Quick Services**

Family Income:

Income	Family Income	Family Members	Poverty Level	% of Poverty
\$0.00	\$0.00	1	\$1,011.67	0.00 %

Enrollment: \* 09/05/2018 - ESG - SO - 501

Grant (Select to view available services): \* ESG - SO - 501

Service: \* ESG - Case Management

Location: \* --SELECT--

Date: \* 09/05/2018

Units: \* 1.00

Unit Value: \* \$0.00

Total: \$0.00

User Performing the Service: Jasmine Rockwell

Comments:

Restriction: \*  Restrict to Organization  Restrict to MOU/Info Release

# Discharge



- Once a client has exited the program, they should be discharged from the HMIS system.
- If a client leaves a program but needs to be enrolled in a different one, they will still need to be discharged from their first program. All of this should occur on the same client profile.

# Discharge Cont'd

Example: Discharge client Tony Smith

Tony Smith  
9/16/1985 407290

Tony Smith's Dashboard

Tony Smith's Information

Name: S  
Gender: M  
Ethnicity: N

Tony's Enrollments

Enrollment Description	Case Members	Case ID	Project Start Date
Current			
ESG - SO - 501	1	101409	09/05/2018

- Edit Enrollment Workflow
- Add Family Member
- View Case Members
- Update/Annual Assessment
- Link Assessments
- Associated Assessments
- Exit the Enrollment
- Review Entry Assessments
- Delete Enrollment

Tony Smith's Dashboard > Enrollment Exit

To exit the client from the Enrollment, enter the **Exit Date** and **Destination**.

Exit Date: \* 09/18/2018

Destination: \* Staying or living with family, temporary tenure (e.g., room, apartment or house)

Exit Reason: Left for a housing opportunity before completing program

Case Manager Assignment: Jasmine Rockwell

End Case Assignment:

# Discharge Cont'd



Default Client's Last Assessment

Assessment Date: 09/18/2018  
 Age at Assessment: 33  
 Assessment Type: Exit  
 Assessor: Jasmine Rockwell  
 Program: ESG - SO - 501

Health insurance. If so, you will be able to record health insurance sources for the client.

Covered by Health Insurance: Yes

Default Last Insurance Status

Type	Status	Reason No	Other Coverage
Private	No	-- SELECT --	
Private - Employer	No	-- SELECT --	
Private - Individual	No	-- SELECT --	
Medicare	No	-- SELECT --	
Medicaid	No	-- SELECT --	
State Children's Health Insurance Program S-CHIP	No	-- SELECT --	
Military Insurance	Yes		
State Funded	No	-- SELECT --	
Combined Children's Health Insurance / Medicaid Program	No	-- SELECT --	
Indian Health Service (IHS)	No	-- SELECT --	
Health insurance obtained through COBRA	No	-- SELECT --	
Other Public	No	-- SELECT --	

Restriction:  Restrict to Organization  Restrict to MOU/Info Release



Assessment Active

Identified Date: 09/18/2018  
 Screen: HMIS Barriers  
 Disabling Condition: Yes

Barrier	Barrier Present?	Condition is Indefinite	Explanation	Previous Barrier Details
<input checked="" type="checkbox"/> Alcohol Abuse	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Chronic Health Condition	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Developmental Disability	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Drug Abuse	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> HIV/AIDS	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Mental Health	No			<a href="#">Previous Barrier</a>
<input checked="" type="checkbox"/> Physical Disability	Yes	Yes		<a href="#">Previous Barrier</a>

# Discharge Cont'd

Enrollment Exit > Universal Data Assessment > Income and Sources, Non-Cash Benefits

Indicate below the client's sources of monthly income, non-cash benefits and expenses.

The following instructions are quoted from the HMIS Data Manual:

- When a client has income, but does not know the exact amount a "Yes" response should be recorded for both the overall income question and the specific source, and the income amount should be estimated.
- Income received by or on behalf of a minor child should be recorded as part of household income under the Head of Household, unless the federal funder in the HMIS Program Specific Manual instructs otherwise. Income should be recorded at the client-level for heads of household and adult household members. Projects may choose to collect this information for all household members including minor children, as long as this does not interfere with accurate reporting per funder requirements. Projects collecting data through client interviews should ask clients whether they receive income from each of the sources listed rather than asking them to state the sources of income they receive.
- Income data should be recorded only for sources of income that are current as of the information date (i.e. have not been specifically terminated). As an example, if a client's employment has been terminated and the client has not yet secured additional employment, the response for Earned Income would be "No." As a further example, if a client's most recent paycheck was 2 weeks ago from a job in which the client was working full time for \$15.00/hour, but the client is currently working 20 hours per week for \$12.00 an hour, record the income from the job the client has at the time data are collected (i.e. 20 hours at \$12.00 an hour).

Default List Assessment

Assessment Active

Assessment Date: 09/18/2018

Income from Any Source: Yes

Non-Cash Benefits from Any Source: No

Expenses: - SELECT -

Type	Description	Monthly Amount	Restriction
<input type="checkbox"/>	Earned Income (i.e. employment income)		Restrict to MOU/Info Release
<input type="checkbox"/>	Unemployment Insurance		Restrict to MOU/Info Release
<input checked="" type="checkbox"/>	Supplemental Security Income (SSI)	\$500.00	Restrict to MOU/Info Release
<input type="checkbox"/>	Social Security Disability Insurance (SSDI)		Restrict to MOU/Info Release
<input type="checkbox"/>	Veteran's Disability Payment		Restrict to MOU/Info Release
<input type="checkbox"/>	Private Disability Insurance		Restrict to MOU/Info Release
<input type="checkbox"/>	Worker's Compensation		Restrict to MOU/Info Release
<input type="checkbox"/>	Temporary Assistance for Needy Families (TANF)		Restrict to MOU/Info Release
<input type="checkbox"/>	General Assistance		Restrict to MOU/Info Release
<input type="checkbox"/>	Retirement Income from Social Security		Restrict to MOU/Info Release
<input type="checkbox"/>	Veteran's Pension		Restrict to MOU/Info Release
<input type="checkbox"/>	Other Pension		Restrict to MOU/Info Release
<input type="checkbox"/>	Child Support		Restrict to MOU/Info Release
<input type="checkbox"/>	Alimony or other spousal support		Restrict to MOU/Info Release

Count/Total Monthly Income: 1 \$500.00

Contact

The HMIS Data Standards manual defines a contact "as an interaction between a worker and a client. Contacts may range from simple a verbal conversation about the client's well-being or needs or may be a referral to service."

Assessment Active

Date of Contact: 09/18/2018

Contact with: Jasmine Rockwell

Enrollment: 09/05/2018 - 09/18/2018 - ESG - SO - 501

Contact Service: Contact

Staying on Streets, ES or SH: No

Exact geographic location: POINT(-84.342429 33.82710)

Alter Units:

Comments:

Restriction:  Restrict to Organization  Restrict to MOU/Info Release

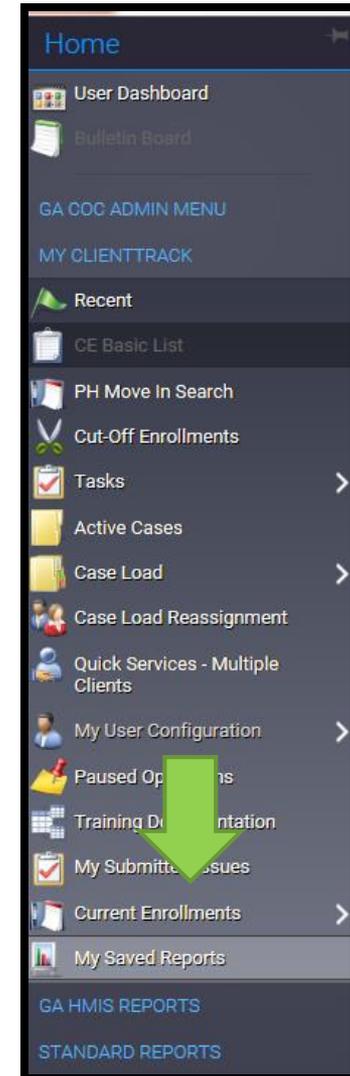
You're done!

All required steps have been completed.

Finish  
Close the workflow

# Current Enrollments

- Home → MY CLIENTTRACK  
→ Current Enrollments
- Once a client is discharged they should no longer show on your current enrollments for programs page.



# Current Enrollments Cont'd

## Before discharge of Tony Smith:

Current Enrollments for Programs

Displayed below are the open enrollments by program. Simply select a program that you have access to and view the list of all current enrollments in the program. Click the icon next to a client to open the client's record and review additional details.

Program: \* ESG - SO - 501

3 results found.

Select Client	Client ID ▲	Client ▲	Enrollment ▲	Enroll Date ▲	Days Enrolled ▲	Case Members ▲
	407258	Apple, Anna	ESG - SO - 501	08/09/2018	40	1
	407270	Jackson, James	ESG - SO - 501	08/15/2018	34	1
	407290	Smith, Tony	ESG - SO - 501	09/05/2018	13	1

## After discharge of Tony Smith:

Current Enrollments for Programs

Displayed below are the open enrollments by program. Simply select a program that you have access to and view the list of all current enrollments in the program. Click the icon next to a client to open the client's record and review additional details.

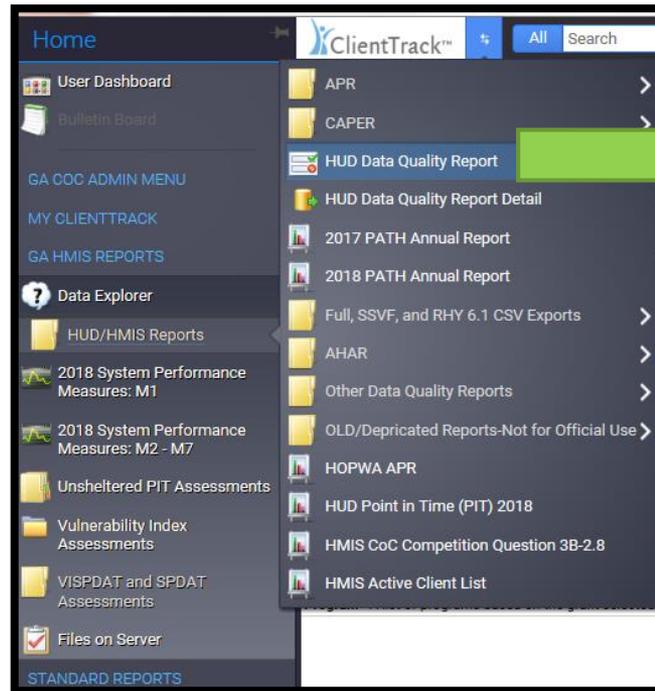
Program: \* ESG - SO - 501

2 results found.

Select Client	Client ID ▲	Client ▲	Enrollment ▲	Enroll Date ▲	Days Enrolled ▲	Case Members ▲
	407258	Apple, Anna	ESG - SO - 501	08/09/2018	40	1
	407270	Jackson, James	ESG - SO - 501	08/15/2018	34	1

# Data Quality Report

- Home → GA HMIS REPORTS → HUD Data Quality Report
- This report should load within 15 minutes.
- Fill in the date and Program ONLY.
- Errors should be less than 15% for all SO programs.



The screenshot shows the 'Saved Report Settings' configuration screen. It includes the following fields and options:

- Saved Report Settings:** A dropdown menu currently set to '- SELECT -'.
- Date Range:** A section with a 'Date Range List' dropdown set to '- SELECT -' and a 'Begin Date' field set to '07/01/2018' to '09/18/2018'.
- Organization:** A section with a label 'Organization: \*' and a list of organizations: 'A Change Generation', 'A Higher Calling, Inc.', 'aaaaaAll VAMC', 'Action Ministries N. GA Trans. Housing ACTION, INC.', and 'Advantage Behavioral Health Systems'. A green checkmark is visible next to the list.
- Grant(s):** A section with a label 'Grant(s):' and a checkbox 'Filter by Grant(s)' which is currently unchecked.
- Program:** A section with a label 'Program: \*' and a list of programs: 'ESG - ES - 501', 'ESG - HP - 501', 'ESG - SO - 501' (which is selected with a green checkmark), 'Fulton CE', 'Irene's Test ATL CE Project', and 'Kate's Test SPC'.

# Data Quality Report Cont'd

HUD Data Quality Report

7/1/2018 to 9/18/2018



Report Criteria

Organizations: DCA Compliance

Programs: ESG - SO - 501

## Q1. Report Validation Table

Total Number of Persons Served	2
Number of Adults (age 18 or over)	2
Number of Children (under age 18)	0
Number of Persons with Unknown Age	0
Number of leavers	1
Number of adult leavers	1
Number of adult and head of household leavers	1
Total Number of Stayers	1
Number of Adult Stayers	1
Number of Veterans	2
Number of Chronically Homeless Persons	0
Number of youth under age 25	0
Number of parenting youth under age 25 with children	0
Number of Adult Heads of Household	2
Number of child and unknown-age heads of household	0
Heads of households and adult stayers in the project 365 days or more	0

## Q2. Personally Identifiable Information (PII)

Data Element	Client Doesn't Know / Refused	Information Missing	Data Issues	% of Error Rate
Name (3.1)	0	0	0	0.00%
Social Security Number (3.2)	0	0	0	0.00%
Date of Birth (3.3)	0	0	0	0.00%
Race (3.4)	0	0		0.00%
Ethnicity (3.5)	0	0		0.00%
Gender (3.6)	0	0		0.00%
Overall Score				0.00%

# Data Quality Report Cont'd

HUD Data Quality Report

7/1/2018 to 9/18/2018



### Q3. Universal Data Elements

Data Element	Error Count	% of Error Rate
Veteran Status (3.7)	0	0.00%
Project Entry Date (3.10)	0	0.00%
Relationship to Head of Household (3.15)	0	0.00%
Client Location (3.16)	0	0.00%
Disabling Condition (3.8)	0	0.00%

### Q4. Income and Housing Data Quality

Data Element	Error Count	% of Error Rate
Destination (3.12)	0	0.00%
Income and Sources (4.2) at Start	0	0.00%
Income and Sources (4.2) at Annual Assessment	0	0.00%
Income and Sources (4.2) at Exit	0	0.00%

### Q5. Chronic Homelessness

Entering into project type	Count of total records	Missing time in institution (3.917.2)	Missing time in housing (3.917.2)	Approximate Date started (3.917.3) DK/R/missing	Number of times (3.917.4) DK/R/missing	Number of months (3.917.5) DK/R/missing	% of records unable to calculate
ES, SH, Street Outreach	2			0	0	0	0.00%
TH	0	0	0	0	0	0	0.00%
PH (all)	0	0	0	0	0	0	0.00%
Total	2						0.00%

### Q6. Timeliness

Time for Record Entry	Number of Project Start Records	Number of Project Exit Records
0 days	1	1
1-3 Days	0	0
4-6 days	0	0
7-10 days	0	0
11+ days	1	0

### Q7. Inactive Records: Street Outreach & Emergency Shelter

HUD Data Quality Report

7/1/2018 to 9/18/2018



Data Element	# of Records	# of inactive Records	% of Inactive Records
Contact (Adults and Heads of Household in Street Outreach or ES - NBN)		0	0 0.00%
Bed Night (All clients in ES - NBN)		0	0 0.00%

# Data Quality Report Detail

- Home → GA HMIS REPORTS → HUD Data Quality Report Detail → Run export
- This report will give you detailed information on where your errors are. Allow up to 24 hours for this report to download.
- It is okay to fill in both the grant and program(s) for this report.
- If you share your computer, please use a password with this report. The password does not have to be the same as your HMIS login password.
- We **will not** be able to retrieve your password if you forget it.
- The report will show up under files on server.

# Data Quality Report Detail Cont'd

The screenshot shows the ClientTrack™ Home dashboard. The left sidebar contains navigation links: Home, User Dashboard, Bulletin Board, GA COC ADMIN MENU, MY CLIENTTRACK, GA HMIS REPORTS, Data Explorer, HUD/HMIS Reports, 2018 System Performance Measures: M1, 2018 System Performance Measures: M2 - M7, Unsheltered PIT Assessments, Vulnerability Index Assessments, VISPDAT and SPDAT Assessments, and Files on Server. The main content area lists various reports: APR, CAPER, HUD Data Quality Report, HUD Data Quality Report Detail (highlighted with a green arrow), 2017 PATH Annual Report, 2018 PATH Annual Report, Full, SSVF, and RHY 6.1 CSV Exports, AHAR, Other Data Quality Reports, OLD/Depricated Reports-Not for Official Use, HOPWA APR, HUD Point in Time (PIT) 2018, HMIS CoC Competition Question 3B-2.8, and HMIS Active Client List.

The screenshot shows the APR Detail configuration page. It includes the following sections:

- Date Range:** Indicate the time period for this report. Only records that fall within the date range you select will be included. Predefined Date Range: . Between:  and .
- Organizations(s):** Indicate which organizations should be included in the report by selecting each organization separately, or click the  icon to select all. Note: The list only shows organizations you are authorized to view. Organizations(s):  A Change Generation,  A Higher Calling, Inc.,  aaaaaAll VAMC,  Action Ministries N. GA Trans. Housing ACTION, INC.,  Advantage Behavioral Health Systems.
- Grant(s):** This list displays grants that belong to the organizations you selected above. Indicate which grants should be included in the report by selecting each grant separately, or click the  icon to select all. Grant(s):  ESG - SO - 501.
- Program(s):** A list of programs based on the grant selected. Program(s):  ESG - ES - 501,  ESG - SO - 501.
- SSN Masking:**

# Data Quality Report Detail Cont'd

Export Encryption

If you encrypt the export, the generated exports will be zipped and encrypted using 256 bit AES encryption that can only be decrypted using the password you provide. Strong passwords are not enforced here, but the password you provide must be at least 8 characters long.

If you choose to not to encrypt your export, the file exported may contain person identifying information in plain text. All appropriate cautions should be exercised to ensure the protection of this information.

Indicate if the exported file(s) should include a header line at the beginning of the file that indicates what each of the values in the CSV file represent and if values in the CSV should always be enclosed in double-quotes.

Encrypt Export:

Password:

Confirm Password:

Include Header Row in CSV File (s):

Always Quote CSV Values(s):

Done

Home

- User Dashboard
- Bulletin Board
- GA COC ADMIN MENU
- MY CLIENTTRACK
- GA HMIS REPORTS
- Data Explorer
- HUD/HMIS Reports**
- 2018 System Performance Measures: M1
- 2018 System Performance Measures: M2 - M7
- Unsheltered PIT Assessments
- Vulnerability Index Assessments
- VISPDAT and SPDAT Assessments
- Files on Server
- STANDARD REPORTS

Files on Server

Displayed below is a list of the files available for you to download. Files may be available for a limited time they expire, and will be automatically removed, on the date specified. To download the file click the download link, to remove the file from file on server click the delete link. The file will no longer be available for download by any user or be available for processing if used in an import once deleted.

[Click to view](#) the status of export or import tasks.

File Name	Creator	Created	Expires
APR 2017	Jasmine Rockwell	8/22/2018	8/22/2019
Detail_20180822111922.zip	Jasmine Rockwell	11:19:22 AM	6:19:22 AM

# Data Quality Report Detail Cont'd

**Files on Server**

Displayed below is a list of the files available for you to download. Files may be available for a limited time they expire, and will be automatically removed, on the date specified. To download the file click the download link, to remove the file from file on server click the delete link. The file will no longer be available for download by any user or be available for processing if used in an import once deleted.

[Click to view](#) the status of export or import tasks.

File Name	Creator	Created	Expires
 APR 2017 Detail_20180822111922.zip	Jasmine Rockwell	8/22/2018 11:19:22 AM	8/22/2019 6:19:22 AM

Do you want to open or save APR 2017 Detail\_....zip from usw.clienttrack.net? ✕

Name	Type	Compressed size	Password ...	Size	Ratio	Date modified
 Data (Validation Only)	Microsoft Excel Comma S...	2 KB	No	8 KB	73%	8/22/2018 6:19 AM
 Data DQ 2 (Validation Only)	Microsoft Excel Comma S...	1 KB	No	1 KB	14%	8/22/2018 6:19 AM
 Data DQ 3 (Validation Only)	Microsoft Excel Comma S...	1 KB	No	1 KB	3%	8/22/2018 6:19 AM
 Data DQ 4 (Validation Only)	Microsoft Excel Comma S...	1 KB	No	1 KB	2%	8/22/2018 6:19 AM
 Data DQ 5 (Validation Only)	Microsoft Excel Comma S...	1 KB	No	1 KB	39%	8/22/2018 6:19 AM
 Data DQ 6 (Validation Only)	Microsoft Excel Comma S...	1 KB	No	1 KB	67%	8/22/2018 6:19 AM
 Data DQ 7 (Validation Only)	Microsoft Excel Comma S...	1 KB	No	1 KB	11%	8/22/2018 6:19 AM

# Questions?

- If you have questions on topics **not discussed** today please contact Jasmine Rockwell at [Jasmine.Rockwell@dca.ga.gov](mailto:Jasmine.Rockwell@dca.ga.gov)  
Phone: 470-446-9176
- If you are new to ESG and need a step-by-step tutorial please email Jasmine to set up a TA meeting.
- Any questions on what was discussed today?

# GA HMIS Training Videos

- <https://dca.ga.gov/safe-affordable-housing/homeless-special-needs-housing/homeless-management-information-system-hmis-0>



Georgia<sup>®</sup> Department of



# Community Affairs