

KYHMIS 102: Creating a Client and Household

In this module, we will go over:

- HUD Requirements
- Entry into the KYHMIS System
- Enter Data As (EDA)
- Back Date Mode
- ClientPoint- Client Creation
- Household Creation
- Release of Information (ROI)
- Project Entry

1

“A Homeless Management Information System (HMIS) is a local information technology system used to collect client-level data on the provision of housing and services to homeless individuals and families and person at risk of homelessness. Each Continuum of Care is responsible for selecting an HMIS software solution that complies with HUD’s data collection, management, and reporting standards.”

- HUD Exchange

2

Universal Data Elements (UDEs):

HMIS Universal Data Elements are elements required to be collected by all projects participating in HMIS, regardless of funding source. Projects funded by any one or more of the Federal Partners must collect the Universal Data Elements, as do projects that are not funded by any Federal Partner (ex: Missions) but are entering data as part of the Continuum of Care's HMIS implementation.

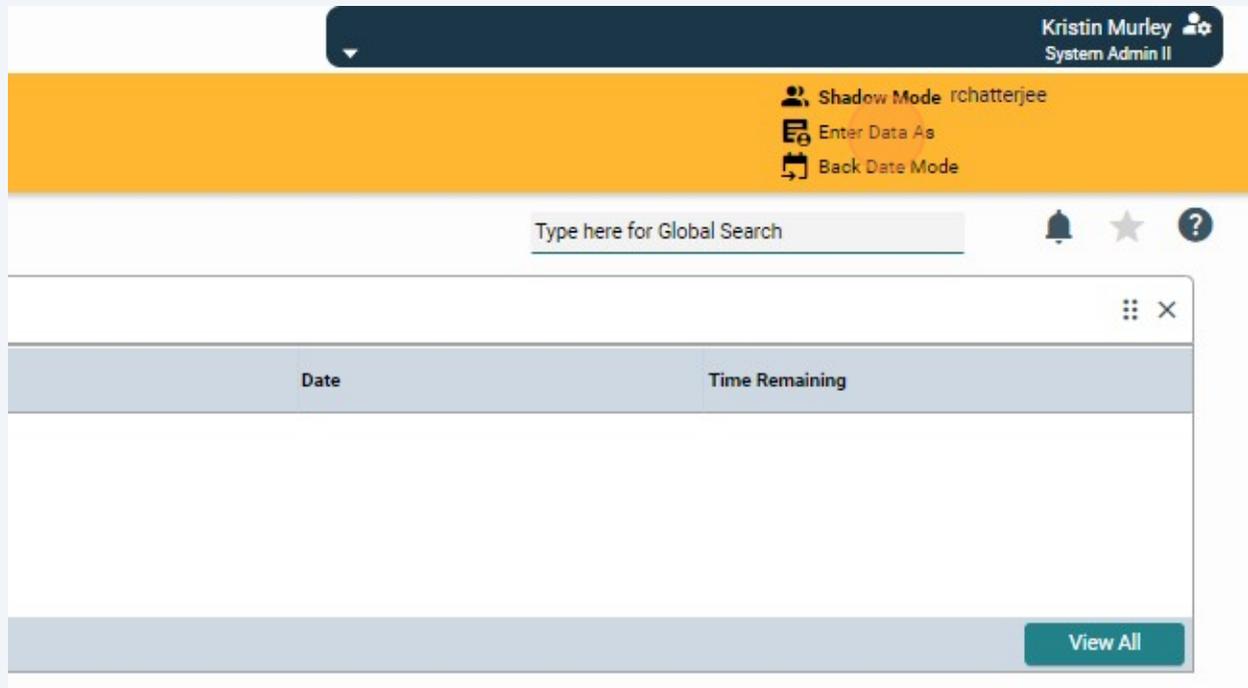
Current HMIS Data Dictionary:

[<https://files.hudexchange.info/resources/documents/HMIS-Data-Dictionary-2024.pdf>]

5 Click "Enter Data As" to start EDA mode.

This is always the first step you want to do before doing anything else.

This is how you tell the System which Project/Program you want to enter the data into.



Tip!

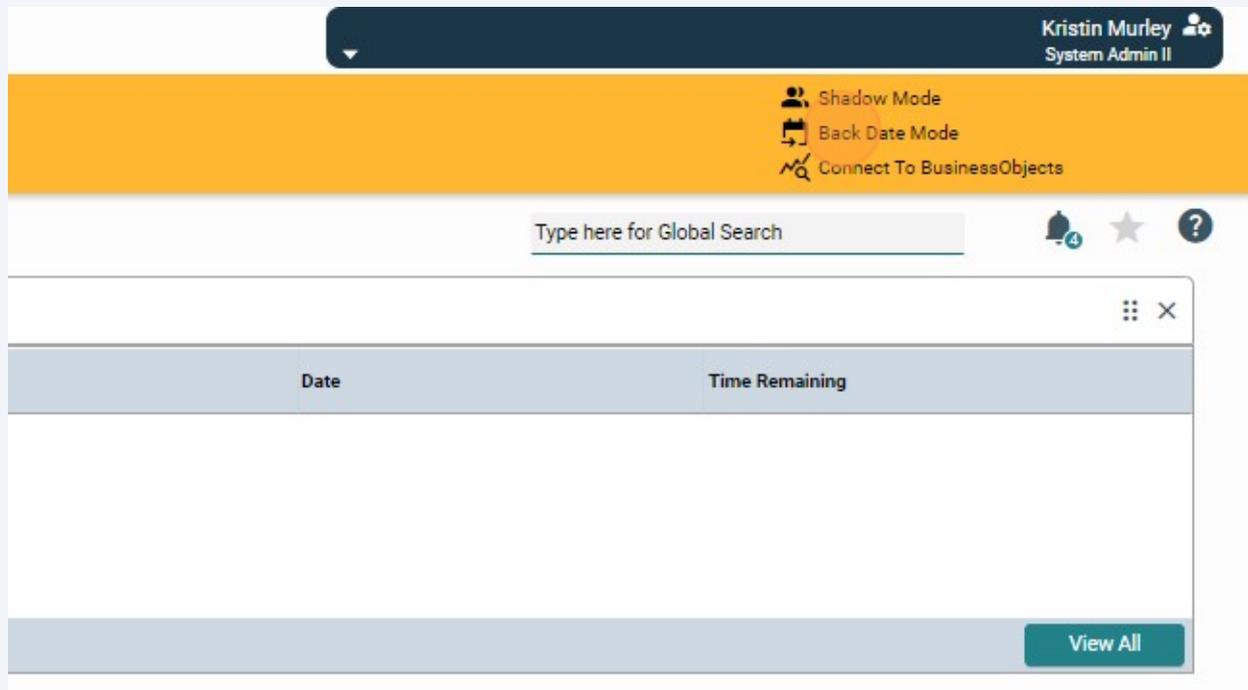
EDA Mode is indicated when there is a blue name next to Enter Data As.

EDA Mode can be exited by clicking on the blue name next to Enter Data As.

7 Next, click "Back Date Mode".

Back Date allows you to enter information for a date prior to the current date.

Essentially, setting your Back Date allows you to set an "effective date" for the data you are entering.



i Tip!

Back Dating is:

Ability to collect client data and enter it later as if it were being entered at the time of collection.

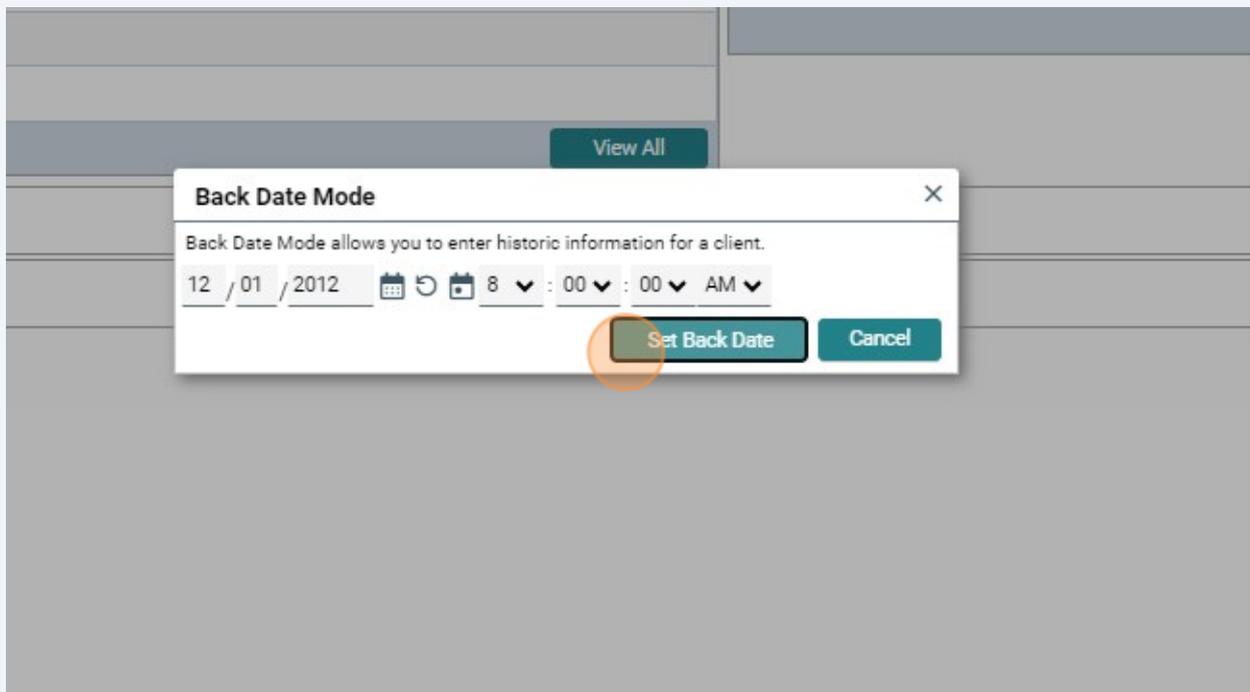
Useful for editing client information that was entered at a previous date and time yet needs to be corrected as of the date entered.

Back Date Mode only works in ClientPoint.

Policy within the BOS is that you must enter data within 3 days of collecting.

8 Choose the date that you want to use for **Back Date Mode** in the system.

Click "Set Back Date".



Tip!

Yellow background banner indicates that Back Date Mode has been activated.

Click on the date to change the day or time.

Click on the red "x" to exit Back Date Mode.

ClientPoint

9 Click "Clients" from your left-hand menu in the system.

This is called ClientPoint.



Kentucky Housing Corporation - BOS
January 11, 2024

Home > Home Page Dashboard

System News (10) Ag

Date	Headline
12/27/2023	HMIS Committee Meeting
12/27/2023	System Performance Measures Committee Meeting
12/20/2023	FY 2024 APCR
12/20/2023	2024 K-Count Trainings Scheduled – Register Today
12/13/2023	HCA Partner Portal Social Security Number Reminder
11/29/2023	Save the Date: 2024 K-Count



Alert!

The System will not allow adding a new client until you click "Search" first.

10

Search for your Client Record via the: Name, Alias, Social Security Number (SSN), and/or Client ID number fields.

24

Clients > Client Search

Client Search

Please S

Name	First	Middle	Last	Suffix
	John	Jo	Smith	
Name Data Quality	-Select-			
Alias				
Social Security Number	123	45	6789	
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	<input checked="" type="checkbox"/>			

Search Clear Add New Client With This Information Add Anonymous Client

Client Number

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

Client ID # Submit

11

Click "Search".

Resources
Shelters
Scans
Reports
Admin
Logout

Collapse <<

Name Data Quality	-Select-			
Alias				
Social Security Number	123	45	6789	
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	<input checked="" type="checkbox"/>			

Search Clear Add New Client With This Information Add

Client Number

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

Client ID # Submit

Client Results

ID	Name
----	------

12

Matching Client Records will be listed under the "Client Results" section (at the bottom of the page).

If a matching record exists, click the pencil/edit icon to the left of the client's name (and skip the next step).

The screenshot shows the WellSky Community Services interface. The top navigation bar includes the WellSky logo, 'ServicePoint Training Site', and 'Kentucky Housing Corporation - BOS' with the date 'January 11, 2024'. A left sidebar contains navigation options: Last Viewed, Favorites, Home, Clients, Resources, Shelters, Scans, Reports, Admin, and Logout. The main content area is titled 'Client Search' and includes a search form with fields for Name (First: John, Middle: Jo, Last: Smith, Suffix:), Name Data Quality, Alias, Social Security Number (123-45-6789), Social Security Number Data Quality, U.S. Military Veteran?, and Exact Match (checked). Below the form are buttons for Search, Clear, Add New Client With This Information, and Add Anonymous Client. A 'Client Number' section allows direct search by ID. The 'Client Results' table shows two entries:

ID	Name	Social Security Number	Date of Birth
8	Doe, Patsy A.	123-45-6789	1967
6	waller, daniel	123-45-6789	1950

The 'Add New Client With This Information' button is circled in orange.

13

If no match exists, create a new record for the client by clicking on the "Add New Client with This Information" button to create a new Client Profile.

This screenshot is identical to the previous one, showing the WellSky Client Search interface. The 'Add New Client With This Information' button is circled in orange.

14 At this point, the system will pop up another reminder to Back Date.

Again, Back Date allows you to select the Effective Date of the information entered and allows for information to be entered for a date prior to the current date. Otherwise, you can "Use Current System Date".

The screenshot displays a 'Back Date Mode' dialog box. At the top, it states 'The current System Date is set to: 12/01/2012 8:00:00 AM'. Below this, it asks 'If you would like to use a different date, please select one below:'. The date selection interface shows '12 / 01 / 2012' with a calendar icon, and time selection shows '8 : 00 : 00 AM'. Three buttons are at the bottom: 'End Back Date Mode', 'Set New Back Date', and 'Use Current System Date'. The 'Use Current System Date' button is circled in orange. In the background, a table is visible with columns 'Social Security Number' and 'Date of Birth'. The table contains two rows of data.

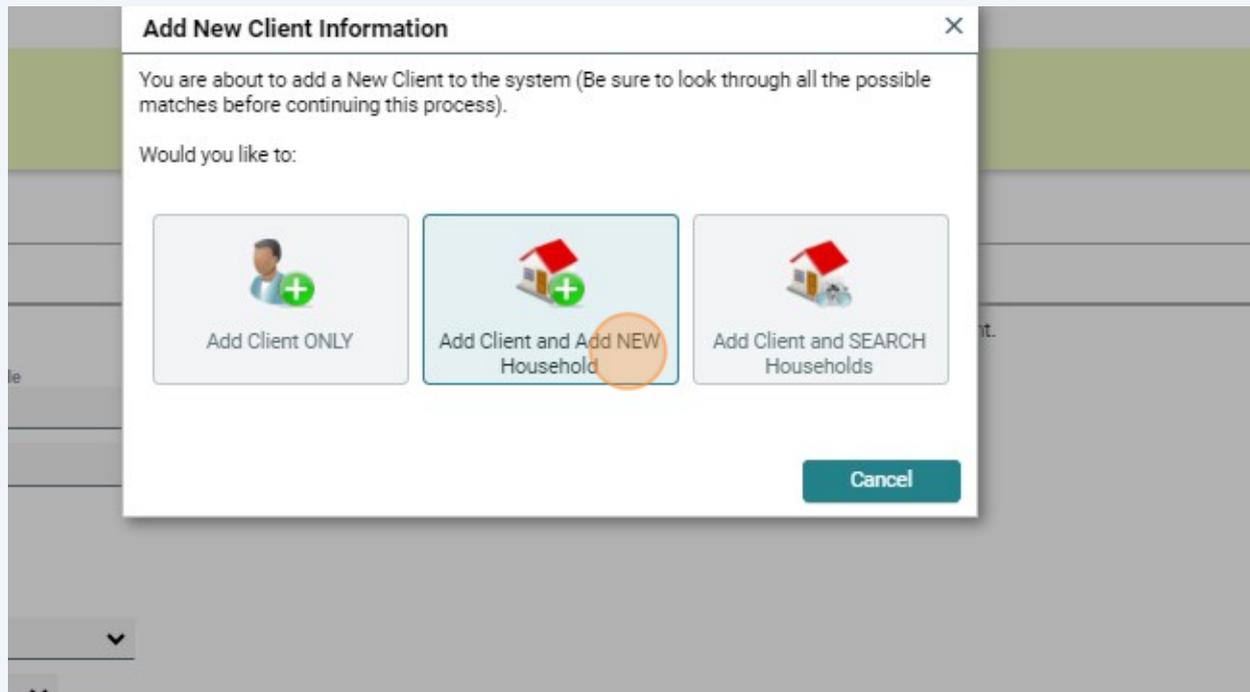
	Social Security Number	Date of Birth
	123-45-6789	1967
	123-45-6789	1950

Showing 1-2 of 2

Household Creation

15

Next, you will need to select whether you are entering data for an Individual ("Add Client ONLY") or a Household ("Add Client and Add NEW Household").



Tip!

Each household member needs to have a separate client record created, and this household area is like a virtual paperclip connecting each client file as a household.

16 When the Household Pop-Up displays, select the "Household Type".

Add New Household

Household Type

Household Type * 

Client Search

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

Name	First	Middle	Last	Suffix
Name Data Quality	<input type="text"/>	<input type="text"/>	Smith	<input type="text"/>
Alias	<input type="text" value="-Select-"/> <ul style="list-style-type: none"> -Select- Caregiver Child Under 18 Couple Couple (Parent & Friend) and Child Couple w. Dependent Children Couple With No Children Female Single Parent Foster Parent(s) Grandparent(s) and Child 			
Social Security Number	<input type="text"/>			
Social Security Number Data Quality	<input type="text"/>			
U.S. Military Veteran?	<input type="text"/>			

17 Search for each additional household member.

ServicePoint Training Site
Kentucky Housing Corporation - BOS
January 11, 2024

Home Clients Resources Shelters Scans Reports Admin Logout

Client Search

Name First

Name Data Quality

Alias

Social Security Number

Social Security Number Data Quality

U.S. Military Veteran?

Exact Match

Client Number

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

Client ID #

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
10	Doe, Devin V.	987-65-4321	1969	Devin White			1
Loading...							

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
23	Smith, John Jo	123-45-6789					0

Showing 1-1 of 1

18

If the additional household member does not already exist in the database, click "Add New Client with This Information".

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

Name: First: Middle: Last: Suffix:

Name Data Quality:

Alias:

Social Security Number: - -

Social Security Number Data Quality:

U.S. Military Veteran?:

Exact Match:

[Search](#) [Clear](#) [Add New Client With This Information](#) [Add Anonymous Client](#)

Client Number

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

Client ID # [Submit](#)

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
+ 10	Doe, Devin V.	987-65-4321	1969	Devin White			1

Showing 1-1 of 1

Selected Clients

19

In this example, the household is a couple and the client already exists.

You will select the "+" button to add existing clients to the household.

(10) Couple

Name: [Manage Household](#)

Previous Households

[Search Existing Households](#) [Start New Household](#)

Add Clients to the Household

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

Name: First: Middle: Last: Suffix:

Name Data Quality:

Alias:

Social Security Number:

Social Security Number Data Quality:

U.S. Military Veteran?:

Exact Match:

[Search](#) [Clear](#) [Add New Client With This Information](#) [Add Anonymous Client](#)

Client Number

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

Client ID # [Submit](#)

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
+ 92	Smith, Sally Sue	987-65-4321	1980				0

Showing 1-1 of 1

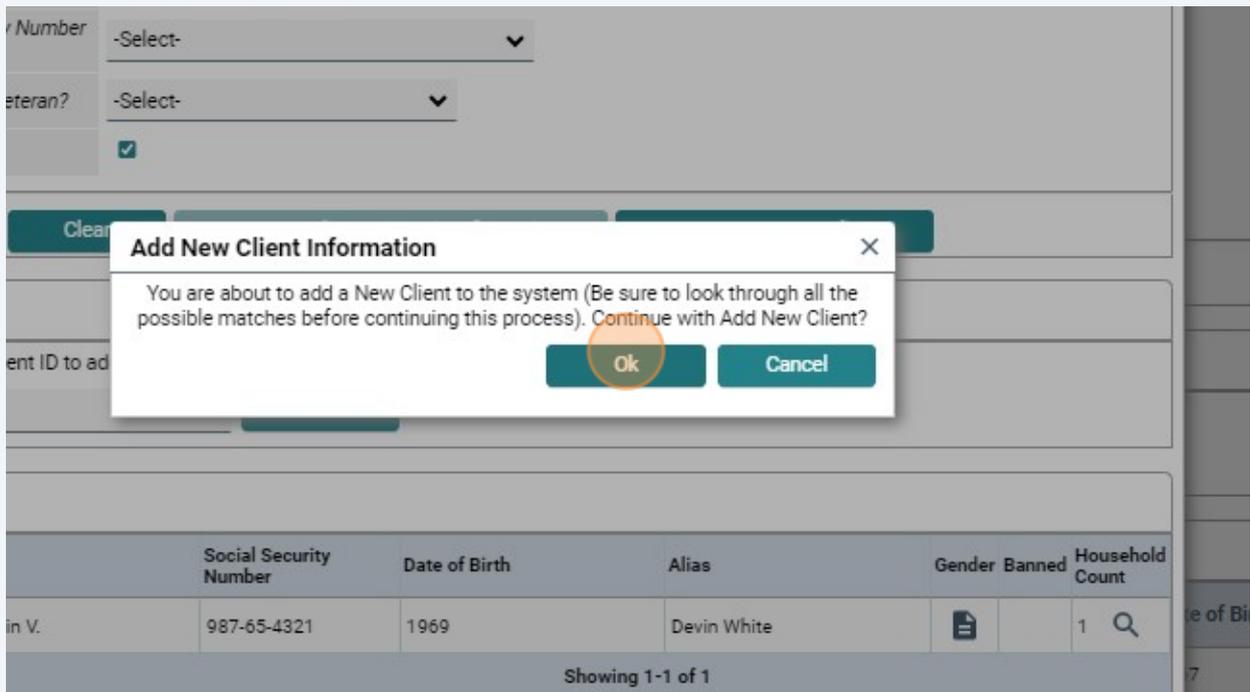
Selected Clients

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

[Continue](#) [Cancel](#)

20

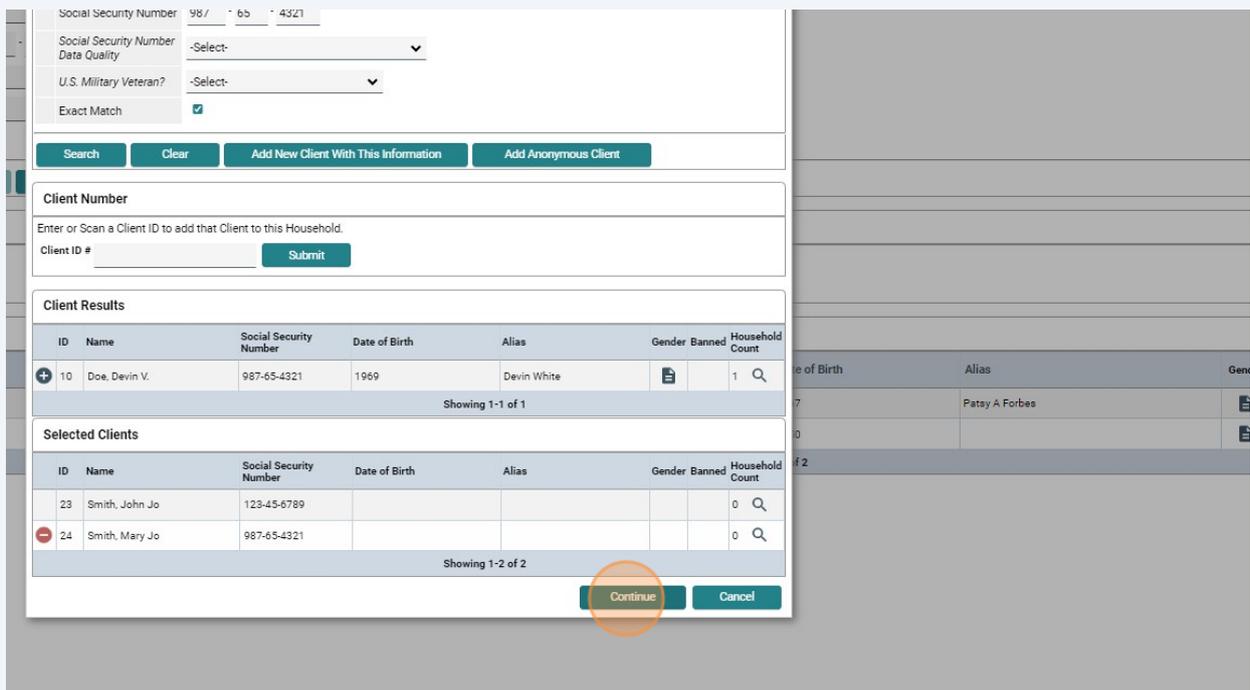
If you are adding a new client, a pop up will appear reminding you to search for possible client matches before continuing. Click "Ok" when ready.



21

Clients added to the household will appear at the bottom of the page under the "Selected Clients" section.

Click the "Continue" button once all household members have been added to the group.



22 Complete:

- **Head of Household**- Defaults to "No", so only change to "Yes" on the one person that is the Head of Household.

Household Information - (10) Couple

(10) Couple Save Save & Exit Exit

Household Type * Couple

Income US\$0.00

Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(23) Smith, John Jo		No	-Select-	12 / 01 / 2012	0	1
(24) Smith, Mary Jo		No	-Select-	12 / 01 / 2012	0	1

Add/Delete Household Members Household History Report

Previous Household Members

Individual Client Assessment No Yes

Household Members

- (23) Smith, John Jo
Age: Unknown
- (24) Smith, Mary Jo

Client Record

Issue ID Card

Name	Smith, John Jo
Name Data Quality	

23 Complete:

- **Relationship to Head of Household-** Select the appropriate relationship. The client that is Head of Household should have "Self" in this field.

- **Joined Household-** Only change *if different from the Back Date or Current System Date.*

(10) Couple Save Save & Exit Exit

Household Type * Couple

Income US\$0.00

Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(23) Smith, John Jo		Yes	Self	12 / 01 / 2012	0	1
(24) Smith, Mary Jo		No	-Select-	12 / 01 / 2012	0	1

Add/Delete Household Members Household History Report

▶ Previous Household Members

Individual Client Assessment

Household Members

- (23) Smith, John Jo
Age: Unknown
- (24) Smith, Mary Jo
Age: Unknown

Client Record

Issue ID Card

Name Smith, John Jo

Name Data Quality

Alias

24 Click the pencil (edit button) to add, edit, or update the information for the Head of Household.

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(23) Smith, John Jo		Yes	Self	12 / 01 / 2012	0	1
(24) Smith, Mary Jo		No	wife	12 / 01 / 2012	0	1

Add/Delete Household Members Household History Report

▶ Previous Household Members

Individual Client Assessment

Household Members

- (23) Smith, John Jo
Age: Unknown
- (24) Smith, Mary Jo
Age: Unknown

Client Record

Issue ID Card

Name Smith, John Jo

Name Data Quality

Alias

Social Security ***-**-6789

SSN Data Quality

U.S. Military Veteran?

Age

Household Profile Assessment

No Household Profile Assessment is specified for this Provider



Alert!

These data elements create the client's unique ID. Altering this data could alter the Unique Identifier for reporting in the database.

25

Fill in the Client Record as prompted & click "Save".

Client Record

⚠ Editing the Client Record Information could affect the Unique ID and the Client Search.

Name	First	Middle	Last	Suffix
	John	Jo	Smith	

Name Data Quality: -Select-

Alias: _____

Social Security: ... - ... - 6789

SSN Data Quality: -Select-

U.S. Military Veteran?: -Select-

-Select-
Full Name Reported
Partial, Street Name, or Code Name Reported
Client Doesn't Know
Client prefers not to answer
Data Not Collected

Save Cancel

Household Members

Name	Age
(23) Smith, John Jo	Unknown

Individual Client Assessment

Client Record

Name	Age
Smith, John Jo	

Issue ID Card

26

Click on the next household member from the menu, then click the pencil (edit button) to add, edit, or update the information.

The screenshot shows a web interface for managing household members. On the left, a sidebar contains several '-Select-' dropdown menus and a 'Submit' button. The main content area is titled 'Individual Client Assessment' and is divided into two columns. The left column, 'Household Members', lists two members: '(23) Smith, John Jo' (Age: Unknown) and '(24) Smith, Mary Jo' (Age: Unknown). The second member is highlighted with a blue selection bar and an orange circle. The right column, 'Client Record', contains a table with the following data:

Name	Smith, John Jo
Name Data Quality	Full Name Reported
Alias	
Social Security	***-**-6789
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	No (HUD)
Age	

Below the table is a section titled 'Household Profile Assessment' with the text: 'No Household Profile Assessment is specified for this P'.

27

Repeat the process of filling in the Client Record as prompted & hit "Save".

The screenshot shows the same web interface as above, but with the 'Client Record' section updated. The 'Household Members' list now shows two members: '(23) Smith, John Jo' (Age: Unknown) and '(24) Smith, Mary Jo' (Age: Unknown). The second member is highlighted with a blue selection bar and an orange circle. The 'Client Record' table now contains the following data:

Name	Smith, Mary Jo
Name Data Quality	
Alias	
Social Security	***-**-4321
SSN Data Quality	
U.S. Military Veteran?	
Age	

At the top of the form, there is a row with a minus sign, '(24) Smith, Mary Jo', 'No', 'wife', and '12 / 01 / 2012'. Below this is a green button labeled 'Add/Delete Household Members'.

28 Click "Save & Exit".

The screenshot displays a software interface for managing household members and client information. The main window is titled "Household Members" and contains a table with the following data:

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(23) Smith, John Jo		Yes	Self	12 / 01 / 2012	0	1
(24) Smith, Mary Jo		No	wife	12 / 01 / 2012	0	1

Below the table are buttons for "Add/Delete Household Members" and "Household History Report".

The "Individual Client Assessment" section is expanded, showing a "Client Record" for "Smith, Mary Jo". The record includes the following information:

- Name: Smith, Mary Jo
- Name Data Quality: Full Name Reported
- Alias
- Social Security: ***-**-4321
- SSN Data Quality: Full SSN Reported (HUD)
- U.S. Military Veteran?: Yes (HUD)
- Age

Below the client record is a "Household Profile Assessment" section with the text: "No Household Profile Assessment is specified for this Provider".

At the bottom of the window are three buttons: "Save", "Save & Exit" (highlighted with an orange circle), and "Exit".



Tip!

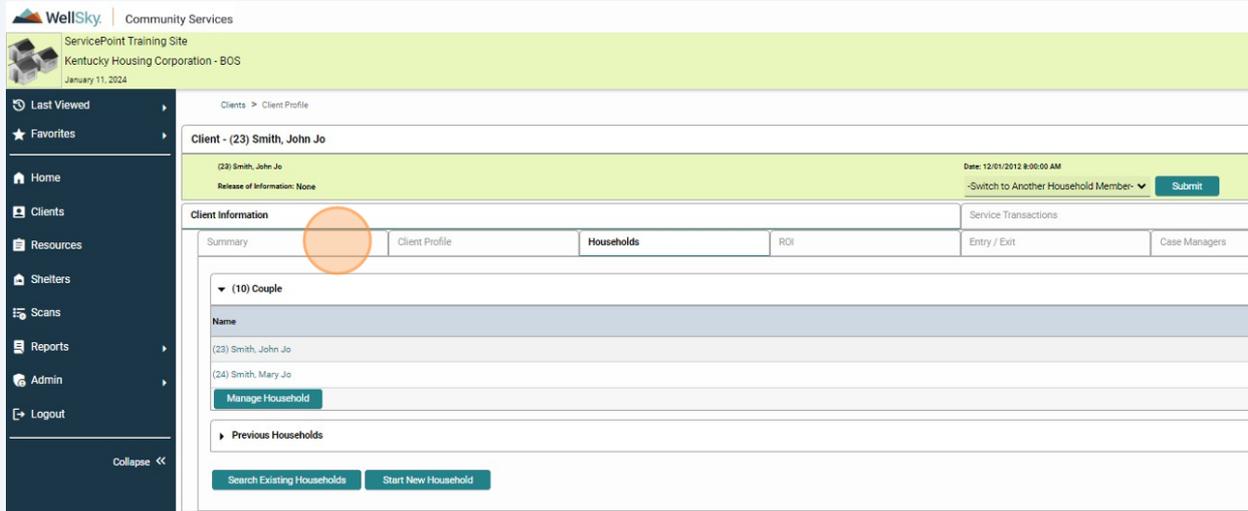
Previous Household Members can be viewed by clicking the black arrow/triangle icon to expand the page section.

Client Information

29

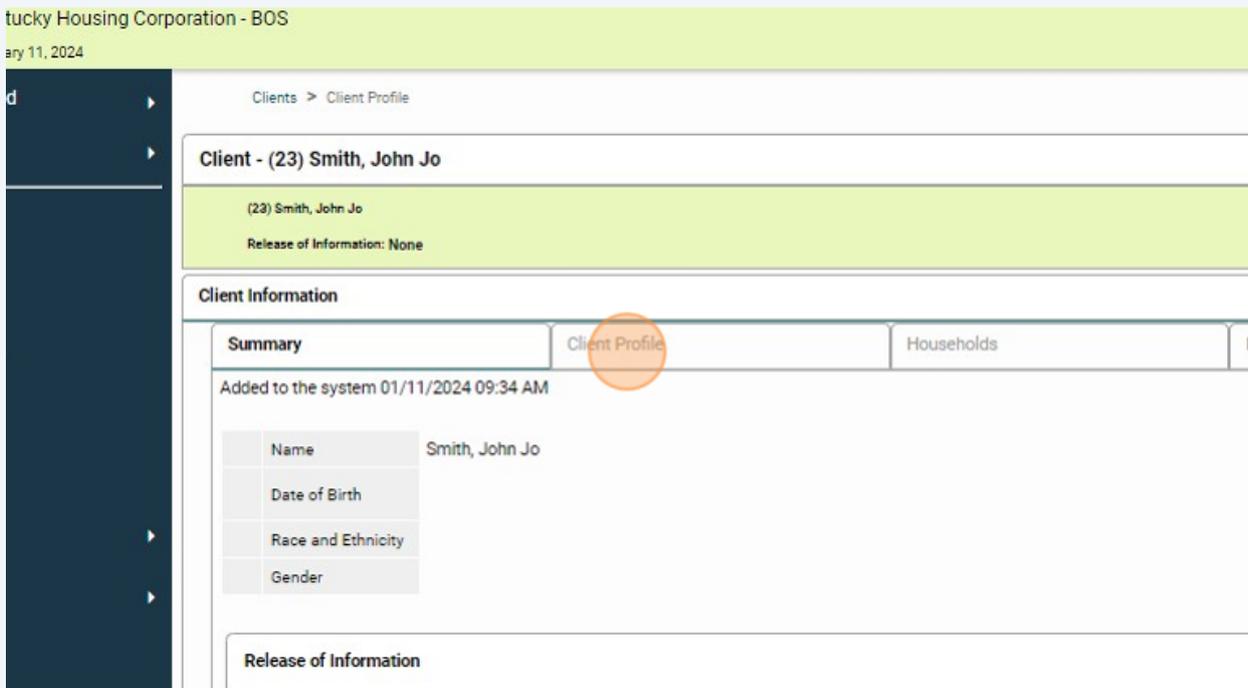
Then you will be automatically taken to the Client Record. You will see the name of the household member you are on, along with several different tabs.

You will want to work from left to right in order through the tabs, filling in information. The "Summary" tab gives a snapshot of the Client Record & usually will not need updates.



30

First, click "Client Profile".



31 Click the pencils (edit button) to add, edit, or update.

Summary	Client Profile	Households	RC
Client Record			
Name	Smith, John Jo		
Name Data Quality	Full Name Reported		
Alias			
Social Security	***-**-6789		
SSN Data Quality	Full SSN Reported (HUD)		
U.S. Military Veteran?	No (HUD)		
Age			
Client Demographics			
Date of Birth			
Date of Birth Type			
To select multiple values hold down the "ctrl" or "cmd" key and click on each value			
Race and Ethnicity			
Additional Race and Ethnicity Detail			
Gender			
If Different Identity, Please Specify			



Alert!

These data elements create the client's unique ID. Altering this data could alter the Unique Identifier for reporting in the database.



Tip!

Clients can now provide their Preferred Name if they do not associate with their legal name- UNLESS legal name is required by the funder (ex: not required by HUD, but maybe by VA, etc.). You are still strongly encouraged to obtain the full Name whenever possible.



Tip!

PATH, CoC & ESG-funded Projects will only required the last 4 SSN to be recorded. You are still strongly encouraged to obtain the full SSN whenever possible.

32 Fill in the Client Profile as prompted & click "Save".

 Editing the Client Demographic Information could affect the Unique ID and the Client Search.

Client Demographics Date: 12/01/2012 08:00:00 AM 

Date of Birth	01 / 01 / 1980   
Date of Birth Type	Full DOB Reported (HUD)  
To select multiple values hold down the "ctrl" or "cmd" key and click on each value	
Race and Ethnicity	<div style="border: 1px solid gray; padding: 5px;"><ul style="list-style-type: none">American Indian, Alaska Native, or IndigenousAsian or Asian AmericanBlack, African American, or AfricanHispanic/Latina/e/oMiddle Eastern or North AfricanNative Hawaiian or Pacific IslanderWhiteClient doesn't knowClient prefers not to answerData not collected</div> 
Additional Race and Ethnicity Detail	<input type="text"/> 
	Woman (Girl, if child)  Man (Boy, if child)



 **Tip!**

Clients can select as many "Race and Ethnicity" options as desired by using the "Control" command when selecting your responses.

33

There is also a Text Box to add additional detail or another option if the one they select is not listed.

To select multiple values hold down the **Ctrl** or **Cmd** key and click on each value

Race and Ethnicity	<ul style="list-style-type: none">American Indian, Alaska Native, or IndigenousAsian or Asian AmericanBlack, African American, or AfricanHispanic/Latina/e/oMiddle Eastern or North AfricanNative Hawaiian or Pacific IslanderWhiteClient doesn't knowClient prefers not to answerData not collected <p>Clear All</p>	
Additional Race and Ethnicity Detail	<input type="text"/>	
Gender	<ul style="list-style-type: none">Woman (Girl, if child)Man (Boy, if child)Culturally Specific Identity (e.g., Two-Spirit)TransgenderNon-BinaryQuestioningDifferent IdentityClient doesn't knowClient prefers not to answerData not collected <p>Clear All</p>	No matches.
		No matches.

34

Clients can also select as many "Gender" options as desired by using the "Control" command when selecting your responses.

There is also a Text Box to add additional detail or another option if the one they select is not listed.

Race and Ethnicity	<ul style="list-style-type: none">Middle Eastern or North AfricanNative Hawaiian or Pacific IslanderWhiteClient doesn't knowClient prefers not to answerData not collected <p>Clear All</p>	
Additional Race and Ethnicity Detail	<input type="text"/>	
Gender	<ul style="list-style-type: none">Woman (Girl, if child)Man (Boy, if child)Culturally Specific Identity (e.g., Two-Spirit)TransgenderNon-BinaryQuestioningDifferent IdentityClient doesn't knowClient prefers not to answerData not collected <p>Clear All</p>	No matches.
If Different Identity, Please Specify	<input type="text"/>	Added From
	<p>Save Cancel</p>	No matches.

35

Before moving forward, if you have additional household members, you will want to utilize this button to "Switch to Another Household Member".

Then click "Submit".

The screenshot shows a web application interface. At the top right, there is a dark blue button with a white downward arrow. Below this is a light green horizontal bar. Underneath the green bar, the text "Date: 12/01/2012 8:00:00 AM" is displayed. A red circle highlights a button labeled "-Switch to Another Household Member-" with a dropdown arrow, and a "Submit" button is to its right. Below this is a table with columns: "Households", "ROI", "Entry / Exit", "Case Managers", and "Case Plans". Under the "Entry / Exit" column, a dropdown menu is open, showing "(10) Couple" and "(24) Smith, Mary Jo".

36

Now repeat the steps of filling in the "Client Profile" tab for each additional household member.

The screenshot shows a web application interface with a dark blue sidebar on the left containing navigation options: Resources, Shelters, Scans, Reports, Admin, and Logout. The main content area has a tabbed interface with "Summary", "Client Profile", "Households", and "RC". The "Client Profile" tab is active. It contains two sections: "Client Record" and "Client Demographics". The "Client Record" section has fields for Name (Smith, Mary Jo), Name Data Quality (Full Name Reported), Alias, Social Security (***-**-4321), SSN Data Quality (Full SSN Reported (HUD)), U.S. Military Veteran? (Yes (HUD)), and Age. The "Client Demographics" section has fields for Date of Birth, Date of Birth Type (with instructions: "To select multiple values hold down the 'ctrl' or 'cmd' key and click on each value"), Race and Ethnicity (with sub-field: "Additional Race and Ethnicity Detail"), Gender, and "If Different Identity, Please Specify".



Alert!

Once you are done filling in the "Client Profile" for each household member, you want to be sure to switch back to the Head of Household's record for the remainder of your data entry. You always want to work from the **Head of Household's** record (other than Client Profiles) because there you can enter data for the **entire** household.

37

Next, utilize the "Switch to Another Household Member" feature to switch back to the Head of Household (HoH).

Then click "Submit".

The screenshot shows a software interface with a light green header bar. Below the header, there is a search bar with the placeholder text "Type here for Global Se". Below the search bar, there is a date field displaying "Date: 12/01/2012 8:00:00 AM". Below the date field, there is a dropdown menu showing "(23) Smith, John Jo" with a downward arrow. To the right of the dropdown menu is a blue "Submit" button, which is highlighted with an orange circle. Below the dropdown menu, there is a table with three columns: "Service Transactions", "Entry / Exit", "Case Managers", and "Case Plans".

38

Continue moving left to right across the tabs. The next tab is the "Households" tab. You will want to review the information on this tab to ensure the information is correct.

If they are an individual, you do **not** need to create a household for them.

The screenshot shows a client profile page with a navigation bar at the top containing three tabs: "Client Profile", "Households", and "ROI". The "Households" tab is highlighted with an orange circle. Below the navigation bar, the client's information is displayed:

- Smith, John Jo
- Full Name Reported
- ***-**-6789
- Full SSN Reported (HUD)
- No (HUD)
- ...

39

You can click on "Previous Households" to see any households in HMIS that the client has been apart of before (if they were already in the system).

To add a Household, click "Start New Household".

The screenshot shows the household management interface. On the left is a dark sidebar with navigation options: "Shelters", "Scans", "Reports", "Admin", "Logout", and a "Collapse <<" button. The main content area shows a dropdown menu for "(10) Couple" with a list of households:

- (23) Smith, John Jo
- (24) Smith, Mary Jo

Below the list is a "Manage Household" button. Underneath is a "Previous Households" section with a right-pointing arrow, which is highlighted with an orange circle. At the bottom of the main content area are two buttons: "Search Existing Households" and "Start New Household".

40

If any changes need to be made or if any information is not filled out, those changes can be made by choosing "Manage Household".

WellSky | Community Services
ServicePoint Training Site
Kentucky Housing Corporation - BOS
January 11, 2024

Client - (23) Smith, John Jo
Date: 12/01/2012 8:00:00 AM
Release of Information: None
-Switch to Another Household Member- Submit

Client Information

Summary	Client Profile	Households	ROI	Service Transactions	Entry / Exit	Case Managers	Case Plans	Assess
---------	----------------	------------	-----	----------------------	--------------	---------------	------------	--------

(10) Couple

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *
(23) Smith, John Jo	32	Yes	Self	12 / 01 / 2012
(24) Smith, Mary Jo	31	No	wife	12 / 01 / 2012

Manage Household

Previous Households

This Client is not a previous member of any Households.

Search Existing Households Start New Household

41

When you are satisfied with the Household information, click "Exit".

Household Information - (10) Couple

Save Save & Exit Exit

Household Type * Couple

Income US\$0.00

Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(23) Smith, John Jo	32	Yes	Self	12 / 01 / 2012	0	1
(24) Smith, Mary Jo	31	No	wife	12 / 01 / 2012	0	1

Add/Delete Household Members Household History Report

Previous Household Members

Individual Client Assessment

Household Members

- (23) Smith, John Jo Self, Age: 32
- (24) Smith, Mary Jo wife, Age: 31

Client Record

Name Smith, John Jo
Name Data Quality Full Name Reported
Alias
Social Security ***-**-6789
SSN Data Quality Full SSN Reported (HUD)
U.S. Military Veteran? No (HUD)
Age 32

Household Profile Assessment

No Household Profile Assessment is specified for this Provider

Issue ID Card

Exit

Release of Information (ROI)

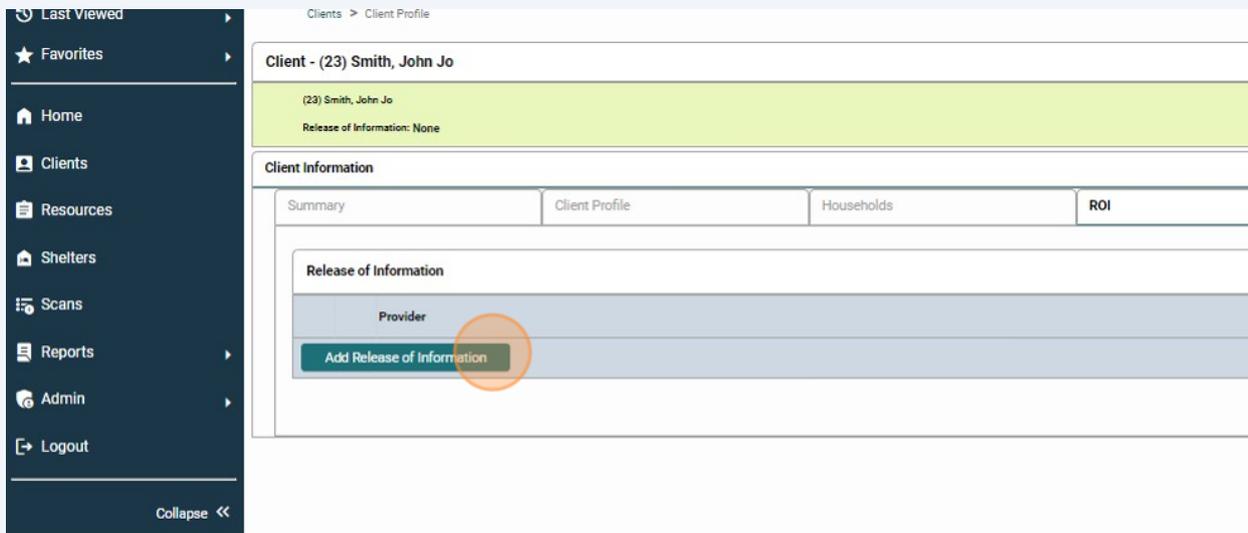
42 The next tab moving left to right is ROI.

ROI's are required in Community Services (HMIS) for each client and each project!

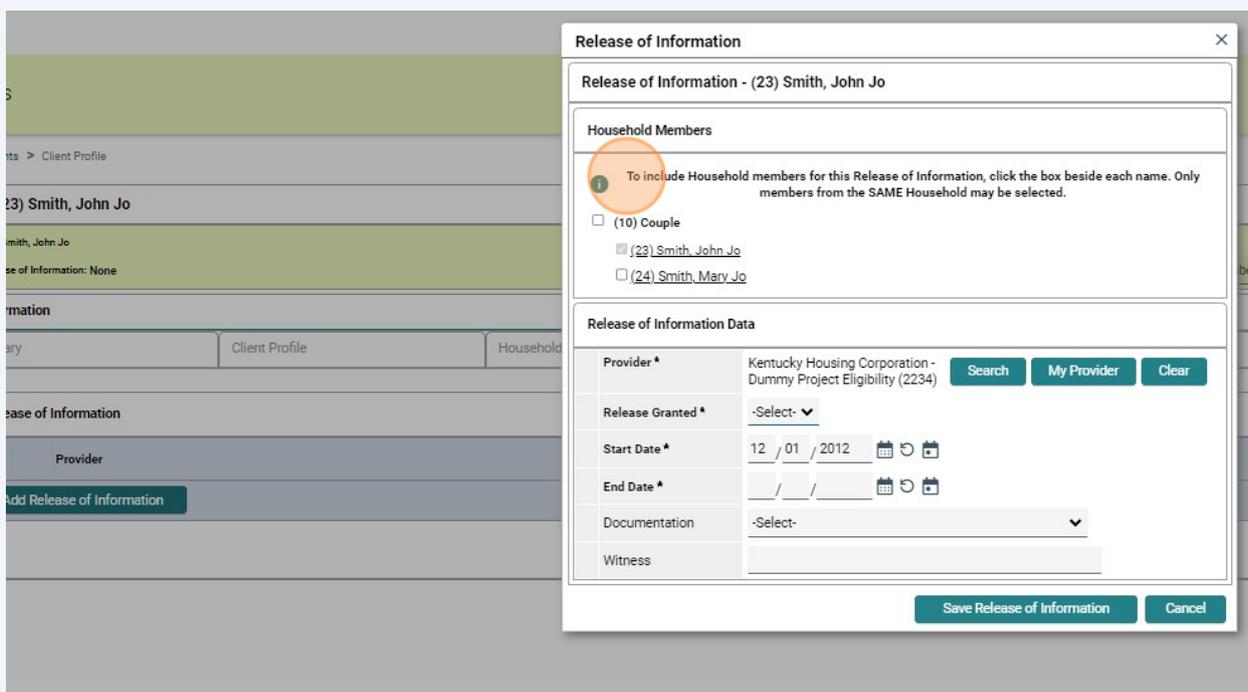
The screenshot shows a software interface with a light green header bar. On the right side of the header, there is a date 'Date: 12/01/2012 9:00:00 AM', a dropdown menu labeled '-Switch to Another Household Member-', and a 'Submit' button. Below the header is a navigation bar with several tabs: 'Profile', 'Households', 'ROI', 'Service Transactions', 'Entry / Exit', and 'Case Man'. The 'ROI' tab is highlighted with an orange circle. Below the navigation bar are several horizontal bars in light blue, light grey, and white, representing the content area of the application.

43 Go to the ROI tab while in the Client Record.

Click "Add Release of Information".



44 Check Household members (if this applies) to "attach" or associate them with this ROI.



45

Complete appropriate information & then click "Save Release of Information".

The screenshot shows a web application interface with a modal form titled "Release of Information Data" for user "(24) Smith, Mary Jo". The form contains the following fields:

Provider *	Kentucky Housing Corporation - Dummy Project Eligibility (2234)	Search	My Provider	Clear
Release Granted *	Yes			
Start Date *	12 / 01 / 2012	Calendar icon	Refresh icon	Calendar icon
End Date *	12 / 01 / 2013	Calendar icon	Refresh icon	Calendar icon
Documentation	Signed Statement from Client - 1. Release & Share All			
Witness	KM			

At the bottom of the form, there are two buttons: "Save Release of Information" (highlighted with an orange circle) and "Cancel".



Alert!

Each client must have a signed ROI on file at your agency.

*Each client must have an ROI designated in the system **FOR EACH PROJECT** they are enrolled.*

ROIs are good for one (1) calendar year.

46 ROI's can be designated in the system as well as uploaded via the binder clip icon.

The screenshot shows a web application interface with a top navigation bar containing a dropdown menu labeled "-Switch to Another Household Member-" and a "Submit" button. Below this is a "Service Transactions" section with tabs for "Entry / Exit", "Case Managers", "Case Plans", and "Assessments". The "Entry / Exit" tab is active, displaying a table with the following data:

Permission	Start Date	End Date
Yes	12/01/2012	12/01/2013

The table is followed by a footer indicating "Showing 1-1 of 1" and an "Exit" button. A binder clip icon is highlighted in the right side of the table row.

Project Entry

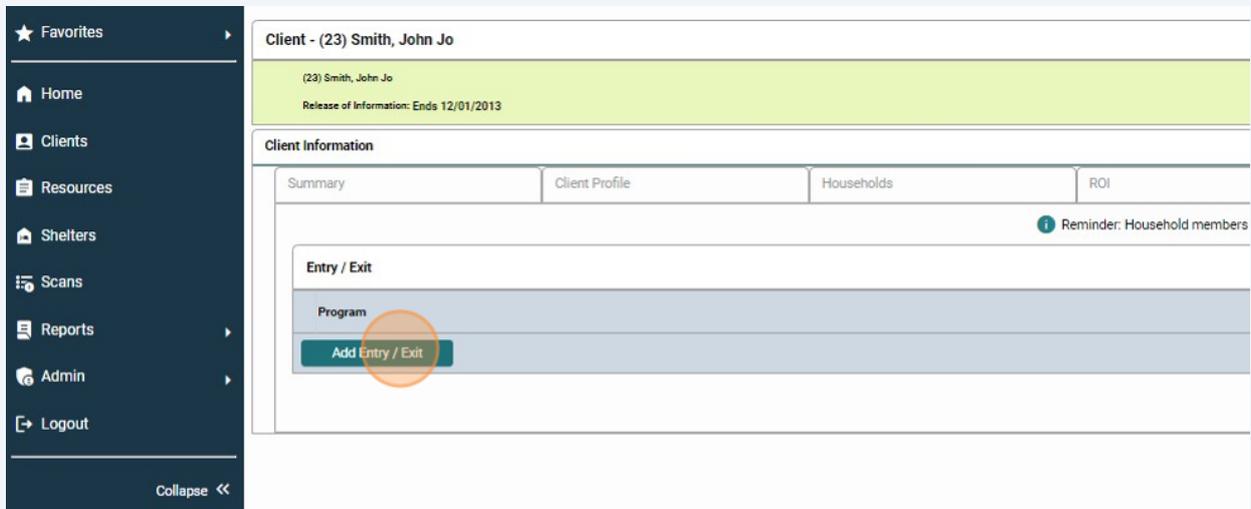
47 Select the Entry/Exit tab.

The screenshot shows a web application interface with a top navigation bar containing a dropdown menu labeled "-Switch to Another Household Member-" and a "Submit" button. Below this is a "Service Transactions" section with tabs for "ROI", "Entry / Exit", "Case Managers", and "Case Plans". The "Entry / Exit" tab is active, displaying a table with the following data:

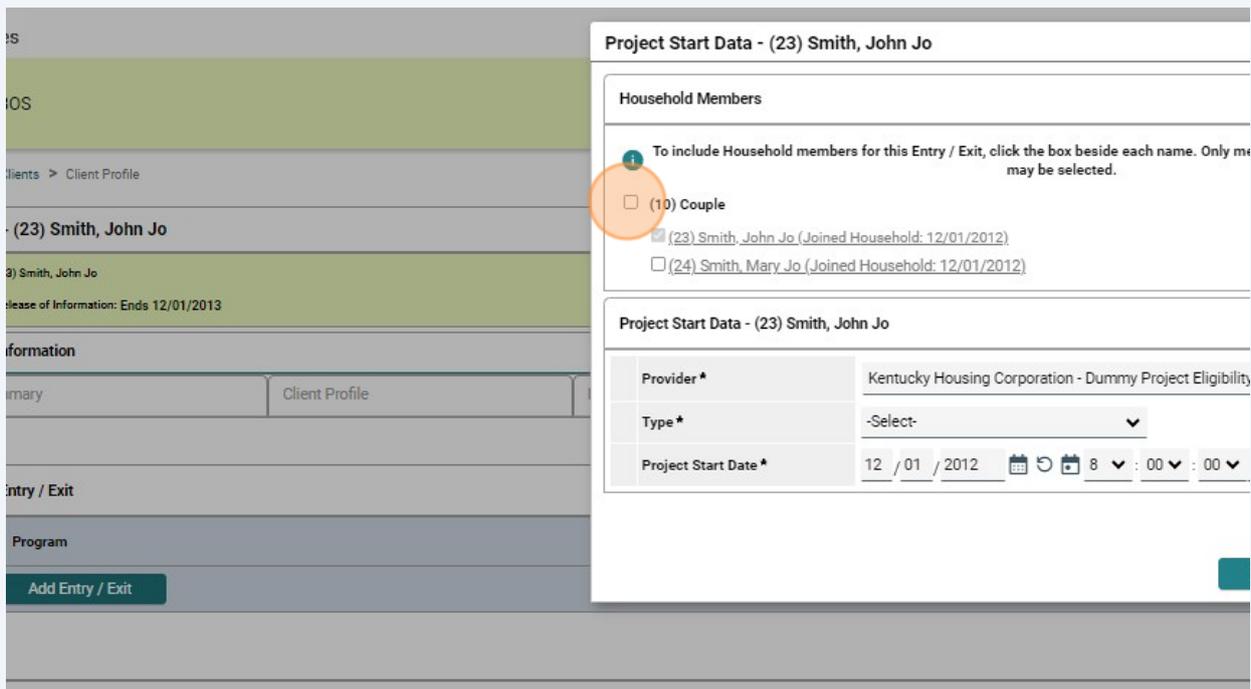
Permission	Start Date
Yes	12/01/2012

The table is followed by a footer indicating "Showing 1-1 of 1". A binder clip icon is highlighted in the "Entry / Exit" tab.

48 Select the "Add Entry/Exit" button.



49 Select all household members that will be entered into the program as appropriate.



50

Provider is defaulted to the project that you're using as your Enter Data As (EDA).

Entry date & time is defaulted to the current system date or the date and time you are Back Dating to.

The screenshot shows a modal form with two main sections. The top section is titled "Household Members" and contains an information icon and a note: "To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected." Below this, there is a checked checkbox for "(10) Couple" and two sub-items: "(23) Smith, John Jo (Joined Household: 12/01/2012)" and "(24) Smith, Mary Jo (Joined Household: 12/01/2012)". The bottom section is titled "Project Start Data - (23) Smith, John Jo" and contains three rows of data: "Provider *" with a dropdown menu showing "Kentucky Housing Corporation - Dummy Project Eligibility (2234)", "Type *" with a dropdown menu showing "-Select-", and "Project Start Date *" with a date field showing "12 / 01 / 2012" and a time field showing "8 : 00 : 00 AM". An orange circle highlights the dropdown arrow for the "Type *" field. At the bottom right of the modal, there are two buttons: "Save & Continue" and "Cancel".

51 Select the type as "**HUD**".

Click "Save & Continue".

The screenshot shows a web form with a modal window open. The modal window has a header with an information icon and text: "To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected." Below this, there are two rows of household members: "(10) Couple" with a checked checkbox, and "(23) Smith, John Jo (Joined Household: 12/01/2012)" with an unchecked checkbox. Below the members is a section titled "Project Start Data - (23) Smith, John Jo" containing three fields: "Provider *" with a dropdown menu showing "Kentucky Housing Corporation - Dummy Project Eligibility (2234)", "Type *" with a dropdown menu showing "HUD", and "Project Start Date *" with a date picker showing "12 / 01 / 2012" and a time picker showing "8 : 00 : 00 AM". At the bottom of the modal are two buttons: "Save & Continue" (highlighted with an orange circle) and "Cancel". The background shows a blurred view of the main form with fields like "Type here for Global Search", "Submit", "Case Managers", "Case Plans", "Exits", "Project Start Date", and "Exit Date".



Alert!

Never use "Basic", "Basic Center", "Standard", or "Transitional Living" for type because we do not have these type of projects within the BOS.

52

Select the assessment that you are wanting to complete.

Complete the Entry Assessment first.

	(24) Smith, Mary Jo	No		12/01/2012		
---	---------------------	----	---	------------	---	---

Include Additional Household Members Showing 1-2 of 2

Entry Assessment

Select an Assessment

BOS- HUD CoC & ESG RRH Entry (FY2024)

BOS- HUD CoC & ESG RRH Update (FY2024)

BOS- HUD CoC & ESG & TBRA E

Household Members

(23) Smith, John Jo
Age: 32
Veteran: No (HUD)

(24) Smith, Mary Jo
Age: 31

BOS- HUD CoC & ESG RRH Entry (FY2024)

SECTION 1: ANSWER FOR ALL CLIENTS

Enrollment CoC | **KY-500 Balance of State** ▼ G

Entry Assessment

53 Answer all the questions on the **Entry Assessment**.

- These fields are important for reporting status at Entry.

Follow the screen from top to bottom.

Click "Save", then click on each household member on the left-hand side of the Entry/Exit data pop-up to complete their Entry Assessments.

Green check marks will appear next to each household member's name as their assessment questions are answered & saved.

Click "Save & Exit" once completed.

The screenshot displays a software interface for an entry assessment. At the top, there are three tabs: "BOS- HUD CoC & ESG RRH Entry (FY2024)", "BOS- HUD CoC & ESG RRH Update (FY2024)", and "BOS- HUD CoC & ESG & TBRA Exit (FY2024)". The first tab is selected. Below the tabs is a "Household Members" list on the left, showing two members: (23) Smith, John Jo (Age: 32, Veteran: No (HUD)) and (24) Smith, Mary Jo (Age: 31, Veteran: Yes (HUD)). The main form area is titled "BOS- HUD CoC & ESG RRH Entry (FY2024)" and contains a section "SECTION 1: ANSWER FOR ALL CLIENTS". The form fields include: "Enrollment CoC" (dropdown menu), "Relationship to Head of Household" (dropdown menu), "Housing Move-in Date" (calendar icon), "Based on the housing move-in date above, what county was the client housed in?" (dropdown menu), "Unit Address" (dropdown menu with options: KY-500 Balance of State, KY-501 Louisville/Jefferson County, KY-502 Lexington/Fayette County), "Unit City" (text field), "Unit Zip" (text field), and "Number of bedrooms in unit" (text field). Each field has a green checkmark icon to its right, indicating it has been answered.

54

HUD **requires** that "Yes" and "No" responses for Monthly Income, Non-Cash Benefits, Health Insurance, and Disabilities be verified during Entry, Updates, and Annual Assessments (Interims), Exits, and Follow-up.

The screenshot shows a portion of a HUD form. At the top, there is a 'Gender' dropdown menu with options: Non-Binary, Questioning, Different Identity, Client doesn't know, Client prefers not to answer, and Data not collected. Below it is a text field for 'If Different Identity, Please Specify'. The 'HEALTH INSURANCE INFORMATION (required question)' section has a 'Covered by Health Insurance?' dropdown set to '-Select-'. Below this is a table with columns: Start Date *, Health Insurance Type, Covered?, (HOPWA) if Private Pay Insurance, Specify, (HOPWA) if No, Reason not covered, and End Date. An 'Add' button is present. The 'DISABILITY INFORMATION (required question)' section has a 'Does the client have a disabling condition?' dropdown set to '-Select-'. Below this is a table with columns: Disability Type, Disability determination, and Start Date *. An 'Add' button is present. A 'Clear All' button is located between the Gender and Health Insurance sections.

55

These can be updated individually by clicking "Add" and manually entering the information for each sub-assessment OR

You can **quickly** do this by clicking the **HUD Verification** link- which is what we strongly recommend.

This screenshot shows the same HUD form as above, but with 'HUD Verification' links and warning icons (red triangles) next to the 'Health Insurance' and 'Disabilities' sections. The 'Covered by Health Insurance?' dropdown is now set to 'Yes (HUD)'. The 'Does the client have a disabling condition?' dropdown is still '-Select-'. The 'Add' buttons are visible in both the Health Insurance and Disability tables. At the bottom, there is a red warning message: 'SECTION 2: IF CLIENT IS A MINOR WHO IS NOT HEAD OF HOUSEHOLD STOP DATA ENTRY HERE'. Below that is the 'INCOME INFORMATION (required information)' section.

56 The HUD Verification pop-up will display.

Select "Yes", "No", "Data Not Collected" as appropriate.

HUD Verification: Health Insurance for 12/01/2012

Per Health Insurance Type, the current records for Health Insurance as of 12/01/2012 are displayed below. Any previous records for Health Insurance not overlapping as of this date are not displayed. In the event that multiple records exist per Health Insurance Type as of 12/01/2012, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Covered? value for all incomplete Health Insurance Type records

Yes
 No
 Data Not Collected
 Incomplete

Health Insurance Type	Covered?			
	Yes	No	Data Not Collected	Incomplete
MEDICAID	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MEDICARE	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
State Children's Health Insurance Program	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Veteran's Health Administration (VHA)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employer - Provided Health Insurance	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health Insurance obtained through COBRA	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Pay Health Insurance	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
State Health Insurance for Adults	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Indian Health Services Program	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save Save & Exit Exit



Tip!

Instead of having to move each radio button individually into either the "Yes" or "No" columns, you can use this menu at the top of the pop-up to move all of the radio buttons to "No". Then you can just select "Yes" where appropriate.

57

If you select "Yes", you will have another pop-up display to complete pertinent information about that benefit or income.

Edit Recordset - (24) Smith, Mary Jo

Disabilities (Please List Drug and Alcohol Disabilities Separately. DO NOT USE THE "BOTH DRUG AND ALCOHOL AB

Disability Type	Mental Health Disorder (HUD)
Disability determination	Client prefers not to answer (HUD) <input type="button" value="G"/>
If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	-Select- <input type="button" value="G"/>
Start Date *	12 / 01 / 2012 <input type="button" value="G"/>
End Date	/ / <input type="button" value="G"/>

-Select-

Client prefers not to answer (HUD)

Yes (HUD)

Data not collected (HUD)

No (HUD)

Client doesn't know (HUD)

<input type="checkbox"/>	Chronic Health Condition (HUD)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Developmental (HUD)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Drug Use Disorder (HUD)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

58

Once completed, click "Save & Exit".

A green check mark will appear once sources are all verified/cleared next to the HUD verification link.

MEDICAID	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
MEDICARE	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
State Children's Health Insurance Program	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Veteran's Health Administration (VHA)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employer - Provided Health Insurance	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health Insurance obtained through COBRA	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Pay Health Insurance	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
State Health Insurance for Adults	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Indian Health Services Program	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Source of Non-Cash Benefit	Start Date *	End Date	Receiving Benefit?
<input type="button" value="Add"/>			

CLIENT HISTORY

PRIOR LIVING SITUATION

Prior Living Situation: -Select-

Length of Stay in Previous Place: -Select-

59

Client History Section:

- Prior Living Situation
- Survivor of Domestic Violence (DV)
- Translation Assistance question
- Foster care question
- Last permanent zip code

		Other TANF-Funded Services (HUD)	12/01/2012		No
		TANF Child Care Services (HUD)	12/01/2012		No
		TANF Transportation Services (HUD)	12/01/2012		No
		Special Supplemental Nutrition Program for WIC (HUD)	12/01/2012		No

Showing 1-5 of 6 [First](#) [Previous](#) [Next](#) [Last](#)

CLIENT HISTORY

PRIOR LIVING SITUATION

Prior Living Situation:

Length of Stay in Previous Place: 6

Survivor of Domestic Violence: 6

If Yes for Survivor of Domestic Violence, When experience occurred: 6

If Yes for Survivor of Domestic Violence Victim/Survivor, Are you currently fleeing?

Translation Assistance Needed:

Client ever in the foster care system?

Zip Code of Last Permanent Address:

CLIENT LIVING HISTORY (in the last 6 months)

Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside) (HUD)
 Emergency shelter, including hotel or motel paid for with emergency shelter voucher, Host Home shelter (HUD)
 Safe Haven (HUD)
 ----- HOMELESS SITUATIONS -----
 ----- INSTITUTIONAL SITUATIONS -----
 Foster care home or foster care group home (HUD)
 Hospital or other residential non-psychiatric medical facility (HUD)
 Jail, prison, or juvenile detention facility (HUD)
 Long-term care facility or nursing home (HUD)
 Psychiatric hospital or other psychiatric facility (HUD)
 Substance abuse treatment facility or detox center (HUD)
 ----- TEMPORARY HOUSING SITUATIONS -----
 Transitional housing for homeless persons (including homeless youth) (HUD)
 Residential project or halfway house with no homeless criteria (HUD)
 Hotel or motel paid for without emergency shelter voucher (HUD)
 Host Home (non-crisis) (HUD)
 Staying or living in a friend's room, apartment, or house (HUD)
 Staying or living in a family member's room, apartment, or house (HUD)

60

“Prior Living Situation” is the location of the client the night before they enter your Project.

This section has logic- so depending on how the client responds will open up a new set of questions.

The screenshot shows a web form titled "PRIOR LIVING SITUATION" with the following fields:

- Prior Living Situation:** Text input field with the placeholder text "Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/sub)".
- Length of Stay in Previous Place:** Dropdown menu with the selected option "One week or more, but less than one month".
- Approximate date this episode of homelessness started:** Date input field showing "11 / 15 / 2012" with calendar icons.
- 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:** Dropdown menu with "-Select-" selected.
- Total number of months homeless on the street, in ES or SH in the past three years:** Dropdown menu with "-Select-" selected.
- Survivor of Domestic Violence:** Dropdown menu with "-Select-" selected.
- If Yes for Survivor of Domestic Violence, When experience occurred:** Dropdown menu with "One time (HUD)" and "Two times (HUD)" as options.



Alert!

Never use "Safe Haven" for "Prior Living Situation", because we do not have these type of Projects within the BOS. Instead select "Emergency Shelter".

61

Length of Stay in Previous Place:

The “Length of Stay in Previous Place” is the amount of time spent in the “Prior Living Situation” that you selected above.

Example*: A client reports a “Prior Living Situation” of “Place not meant for habitation” and they report staying there for 16 days. You would select the closest option on the drop-down menu (“One week or more, but less than one month” for this example).*

62 Approximate date homelessness started:

The “Approximate date homelessness started” should be regarding the **Most Recent** episode of homelessness. In other words, the approximate date that the Prior Living Situation that you keyed above (current episode of homelessness) started on.

Example: Our client’s Project Start date is 6/27/2023, they reported their “Prior Living Situation” (where they stayed on 6/26/23) as “Place not meant for habitation”. They also reported they have slept in this location for 16 days. Thus, their “Approximate date homelessness started” is 6/11/2023.

Note: You as the Case Manager, HMIS user, Street Outreach worker etc. may have to do some math & may have to explain or re-word the question to the client so that they understand what you are asking.

63 Number of times (in last 3 years):

For the next question: “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”, you will want to ask the client how many different episodes of homelessness they experienced within the past 3 years. In other words, were they homeless (living in ES or on the streets/place not meant for habitation), then maybe were they housed (staying with family, couch surfing etc.), and then they became homeless again (living in an ES or Place not meant for habitation)?

Example: Client reports they are homeless as of 6/11/2023, which is equal to one episode of homelessness. However, after you explain this question to them, they start talking about the past 3 years. They tell you: they were homeless for 2 weeks in May 2021, but then were able to stay with a friend for 6 months. This is where you as the Case Manager can assist the client in creating a timeline of their history of homelessness. Essentially, they were homeless and became housed, so this equals another episode of homelessness. Then, they went to a shelter in November 2022 for 4 nights, and then a family member let them sleep on their couch until recently (June 11, 2023), which is when the family member kicked them out. So, we have 3 total episodes of homelessness from this scenario.

Note*: You as the Case Manager, HMIS user, Street Outreach worker etc. may have to explain what an episode of homelessness is, and how that calculates into their Chronic Homeless status. The Case Manager can have a conversation with the client and help to create a timeline of the episodes of homelessness to assist the client with this question if they are unable to determine the answer themselves. The clients need to know that if they go and stay with family, friends, or are couch surfing, etc.- that HUD does not consider that to be a homeless situation.*

64 Total number of months (in last 3 years):

The final Prior Living Situation set of questions (which also helps determine Chronic Homeless status) is: "Total number of months homeless on the street, in ES or SH in the past three years". For this question, one day is equal to one month (if a client is homeless less than 30 days, it is still considered one month for HMIS purposes).

Example*: From the example we used above, the client has 3 episodes of homelessness. 2 weeks in May 2021, which would equal 1 month. Then they were in a shelter for 4 nights, which equals another month. Lastly, their current homeless episode is 16 days, which equals another month. Therefore, the total number of months homeless would equal 3 months.*

Note*: You as the Case Manager, HMIS user, Street Outreach worker etc. may have to do some mental calculating and math, and you may have to get more detail to be able to obtain the most accurate number of months homeless.*

65 When completing these "Client Living History" questions, choose the response that best fits.

In the drop-down menus there are choices for if the client was not in Kentucky, or if under the age of 18, etc.

For the text fields, you can put that they are underage, or did not live in Kentucky, or whatever the case may be for the client.

Address	42101	G
CLIENT LIVING HISTORY (in the last 2 years)		
In the last 2 years, in what Kentucky county did you become homeless?	Clinton	G
If you have lived in multiple Kentucky counties in the last 2 years, please select additional county:	-Select-	G
If you have lived in another part of the US in the last 2 years, please specify state:	-Select-	G
If other location in the last 2 years, please specify:		G
In what Kentucky county are you currently staying?	-Select-	G
Did you have housing when you came to this county/community?	-Select-	G

66

Click "Save", then scroll back up to the top of the screen & click on each household member on the left-hand side of the Entry/Exit data pop-up to complete their Entry Assessments.

The screenshot shows two side-by-side forms. The left form is titled "Household Members" and lists two individuals: (23) Smith, John Jo (Age: 32, Veteran: No (HUD)) and (24) Smith, Mary Jo (Age: 31, Veteran: Yes (HUD)). An orange circle highlights the "Save" button next to Mary Jo's entry. The right form is titled "BOS- HUD CoC & ESG RRR Entry (FY2024)" and contains a section "SECTION 1: ANSWER FOR ALL CLIENTS" with fields for Enrollment CoC, Relationship to Head of Household, Housing Move-in Date, and Unit Address/City.

67

When you are totally done filling in the entry assessment questions, click "Save & Exit".

The screenshot shows the bottom portion of the form with three buttons: "Save", "Save & Exit", and "Exit". An orange circle highlights the "Save & Exit" button.

68

To check to make sure you have entered all clients into the project correctly, check on this "Client Count" button all the way to the right on the Entry/Exit tab.

This tells you which clients are associated with this Project Entry.

The screenshot shows a software interface with three tabs: "Case Managers", "Case Plans", and "Assessments". Below the tabs is a section titled "Exits". Inside this section is a table with the following columns: "Project Start Date", "Exit Date", "Interims", "Follow Ups", and "Client Count". The "Client Count" column has a magnifying glass icon over it. Below the table, there is a status bar that says "g 1-1 of 1". At the bottom right of the interface is a green button labeled "Exit".

	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
	12/01/2012				

