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:

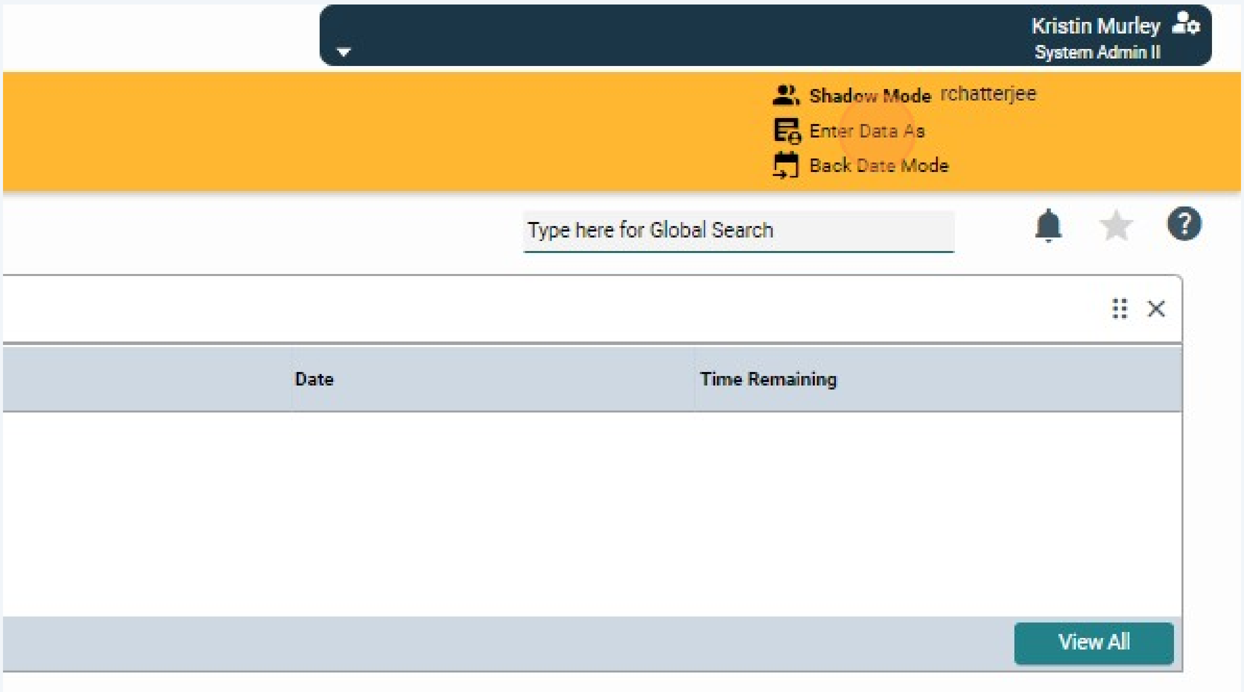
[**https://files.hudexchange.info/resources/documents/HMIS-Data-Dictionary-2024.pdf**

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.



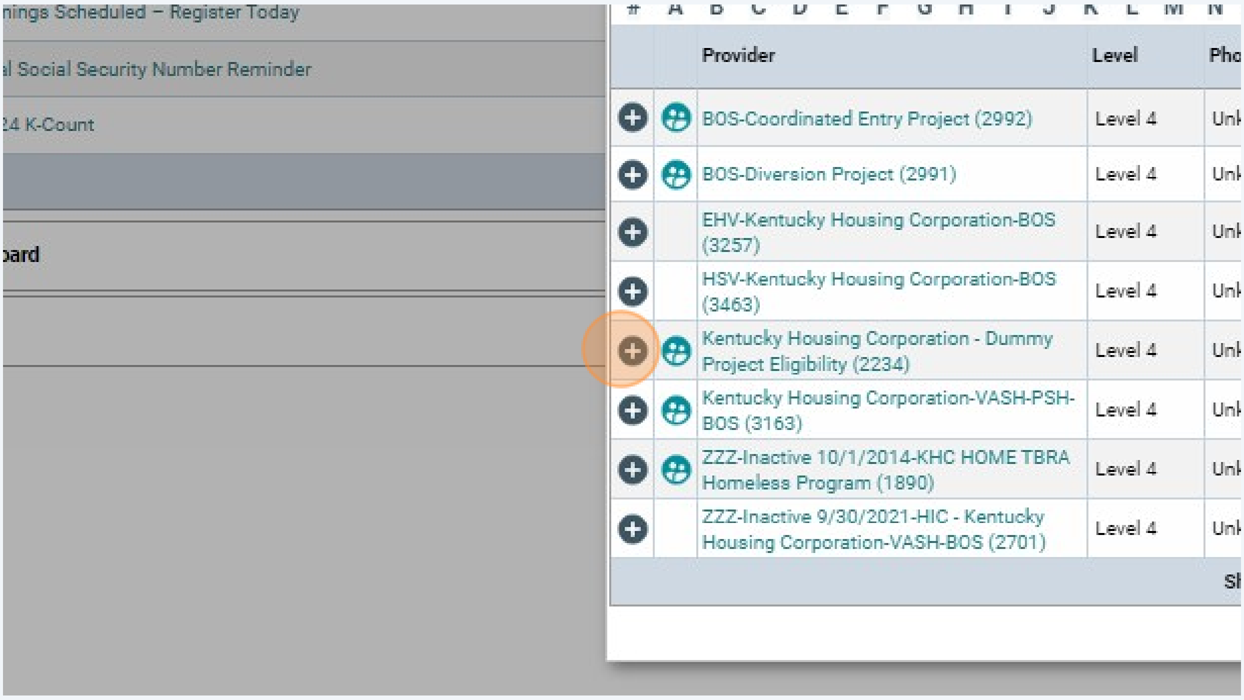
Tip!

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.

6 You can use the Search function, or find your Project listed.

Click the green + sign to set your EDA.



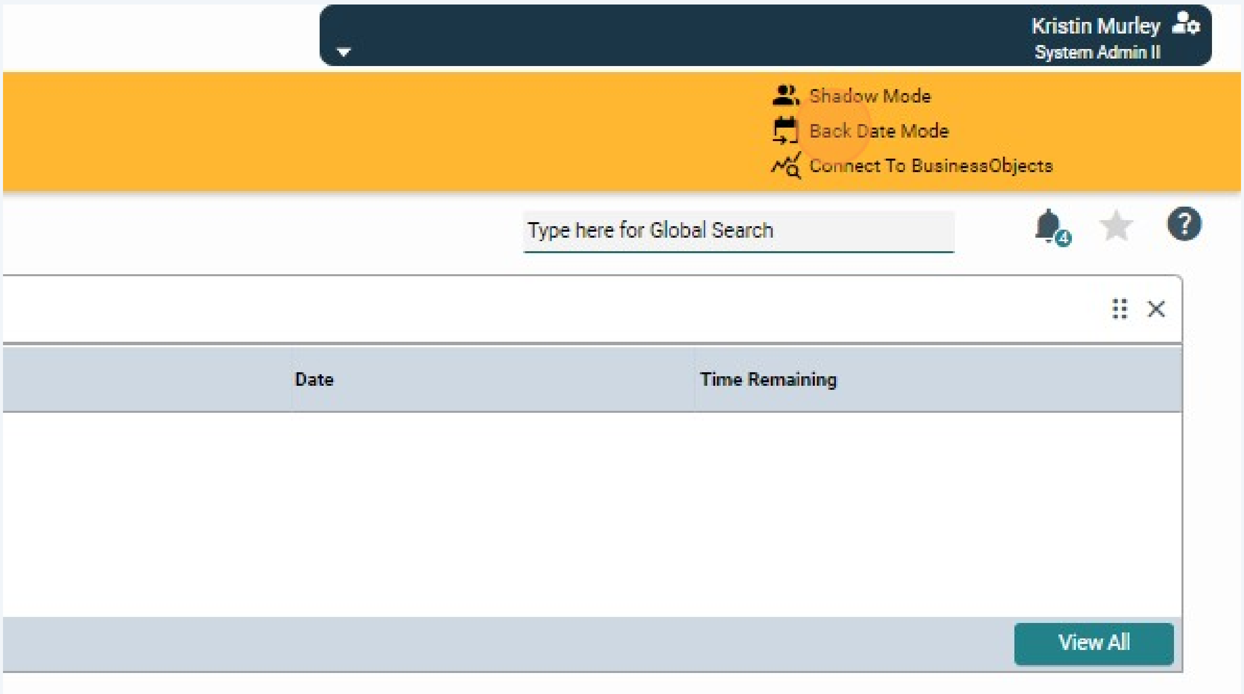
Alert!

Only *put clients into Level 4 Projects!*

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.



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.

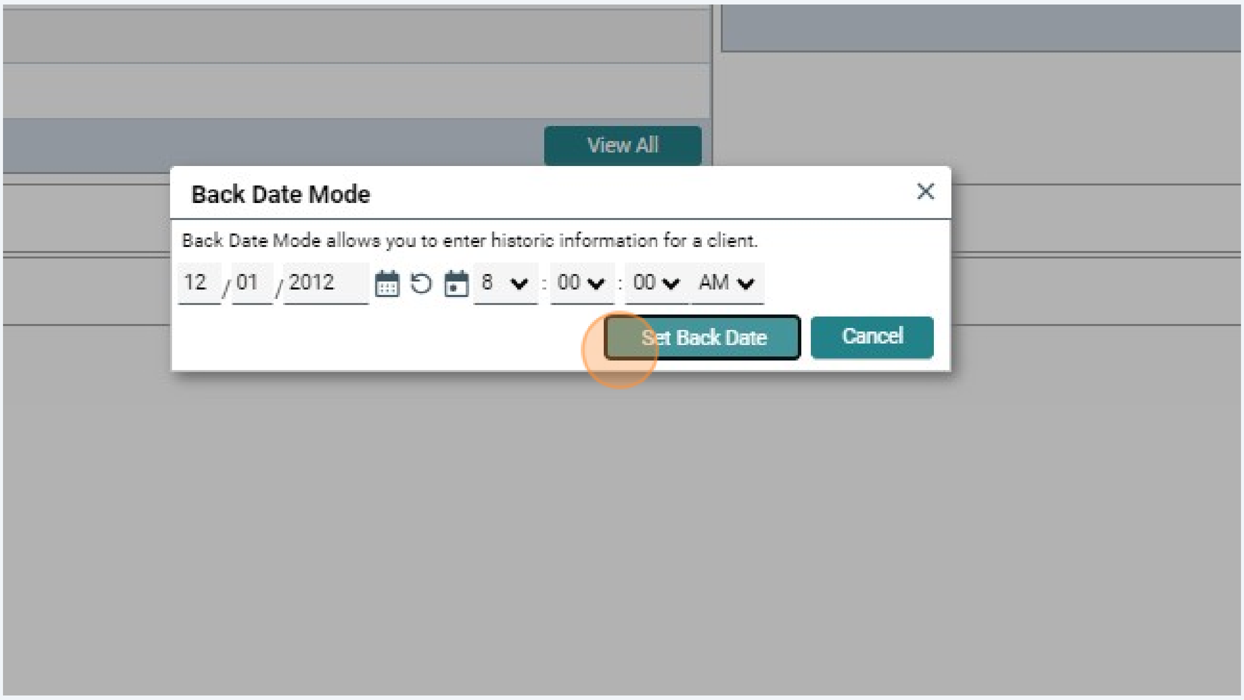
Back Date Mode only works in ClientPoint.

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

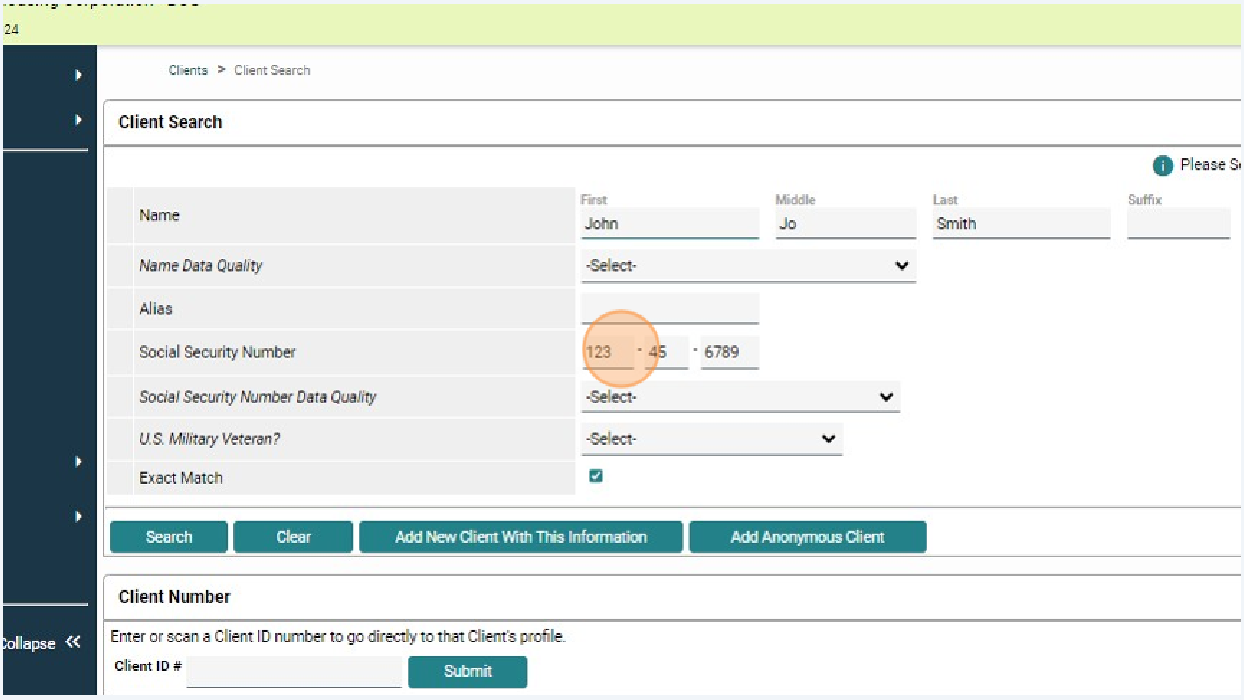
Click "Clients" from your left-hand menu in the system.

This is called ClientPoint.

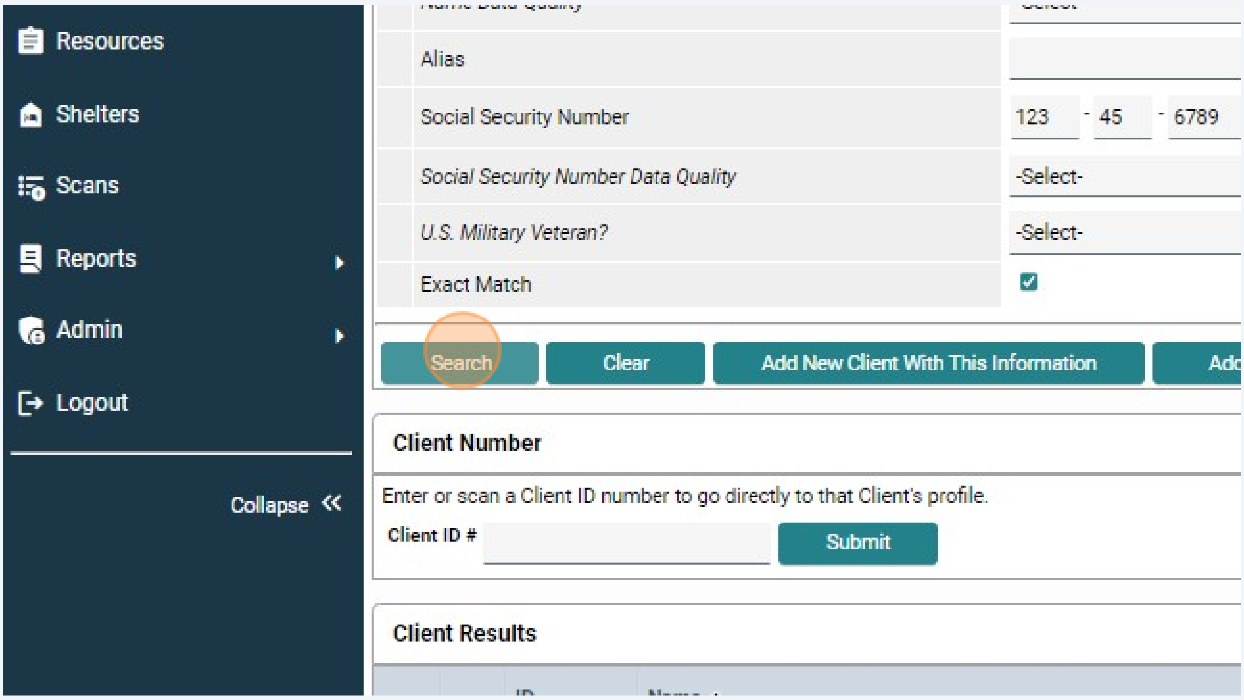
Alert!

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.



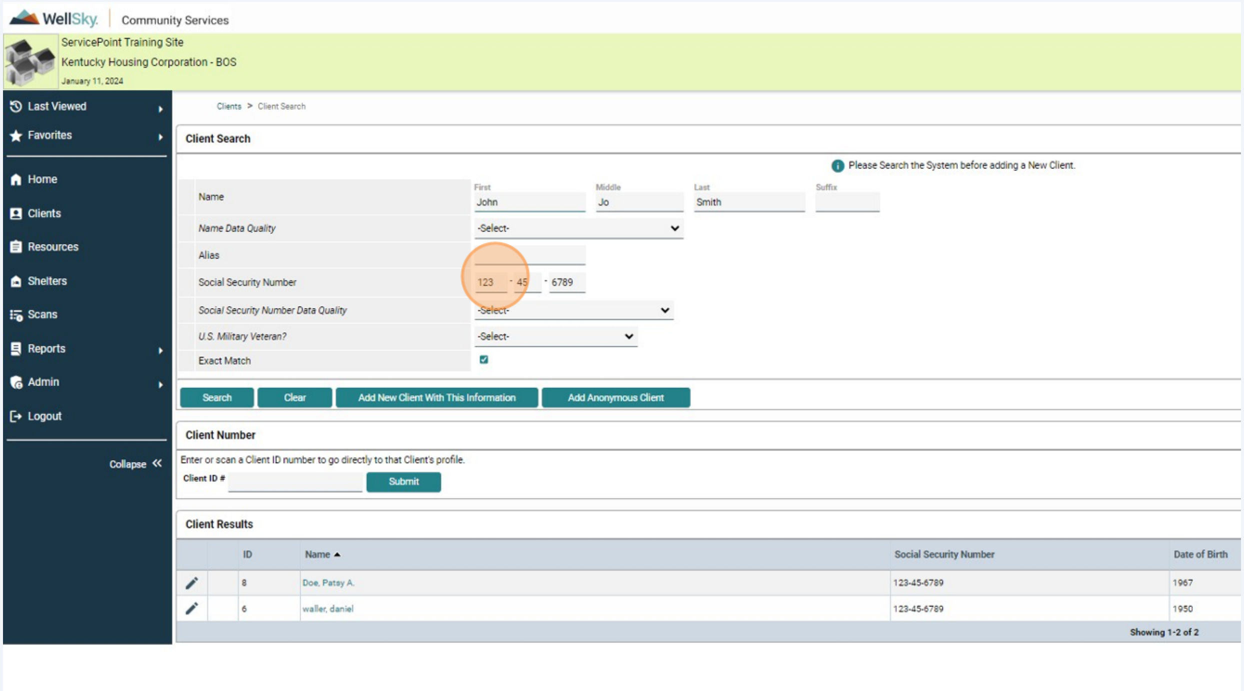
11 Click "Search".



12

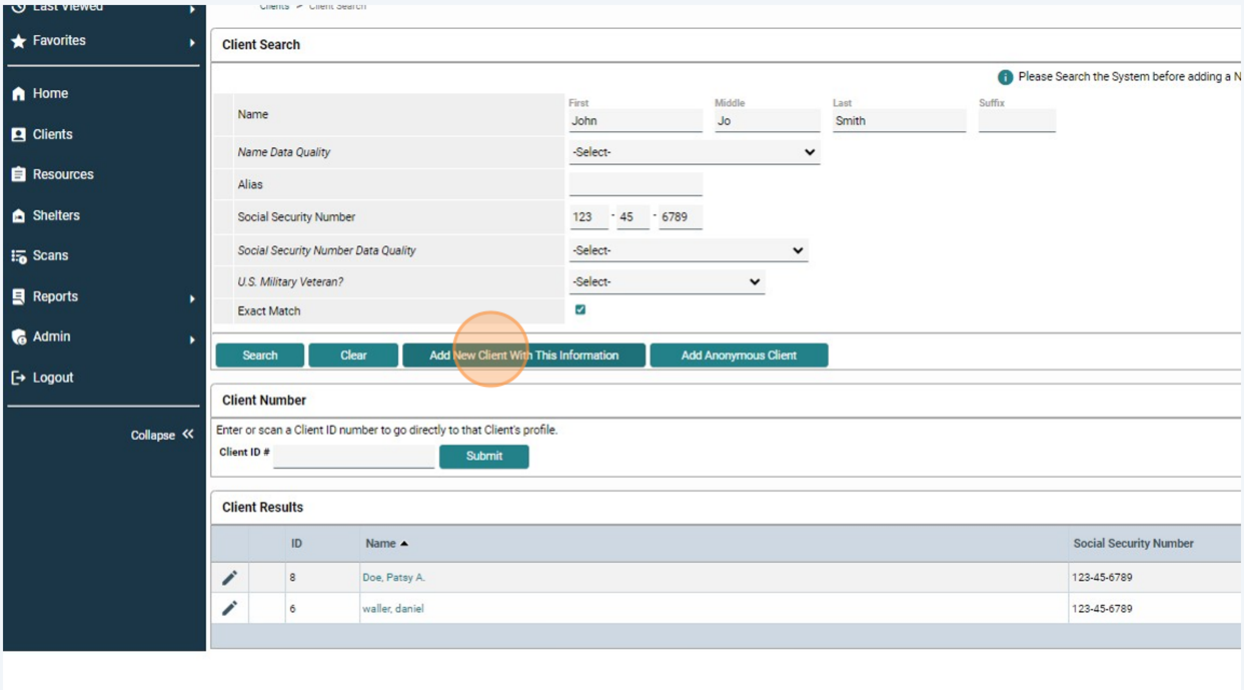
Matching Client Records will be listed under the "Client Results" section (at the bottom of the page).

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



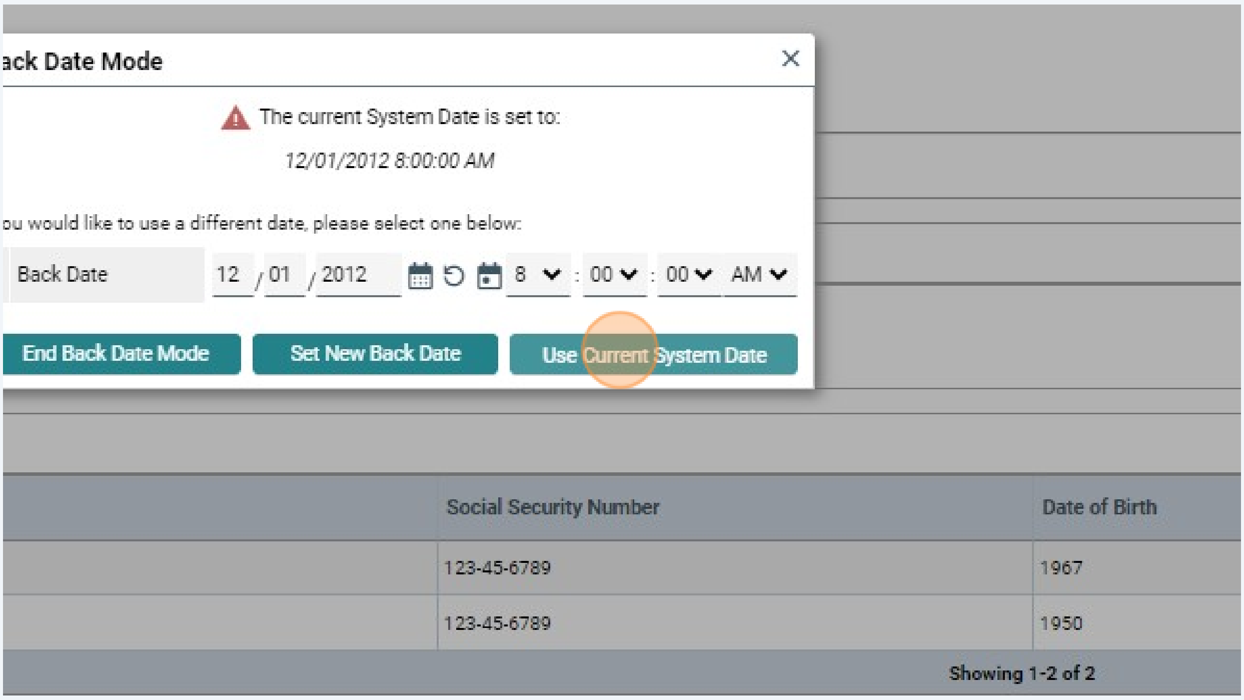
13

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.



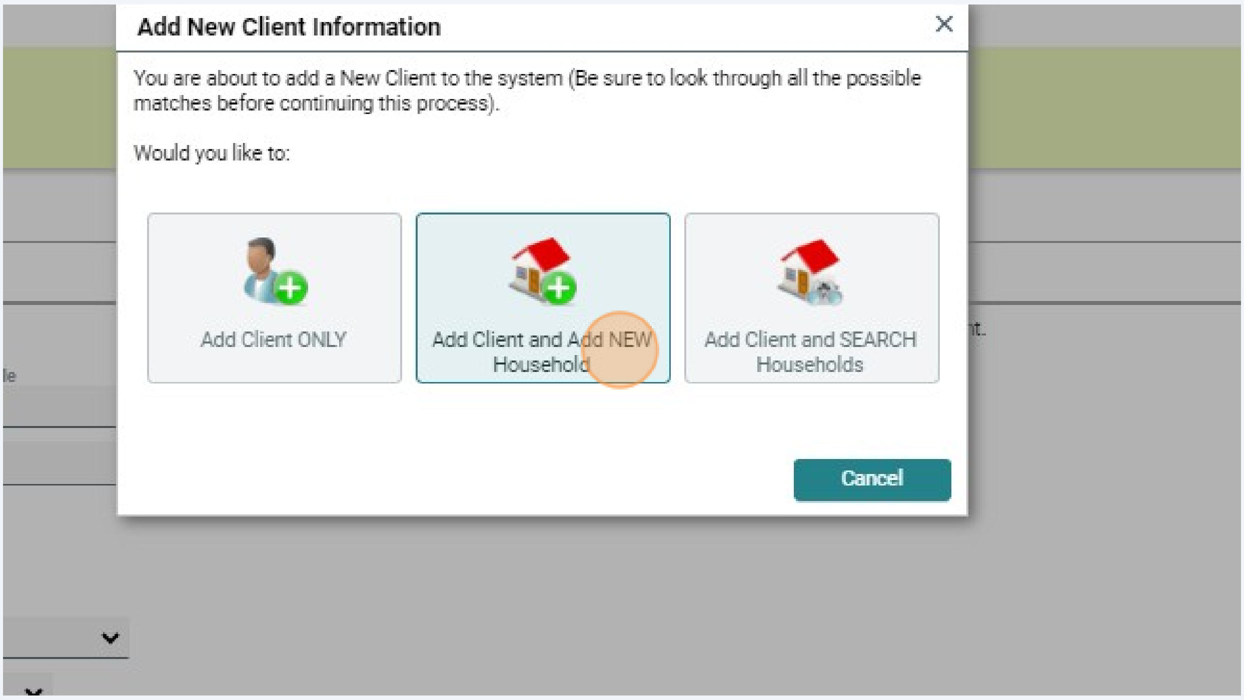
14 At this point, the system will pop up another reminder to Back Date.

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".



Household Creation

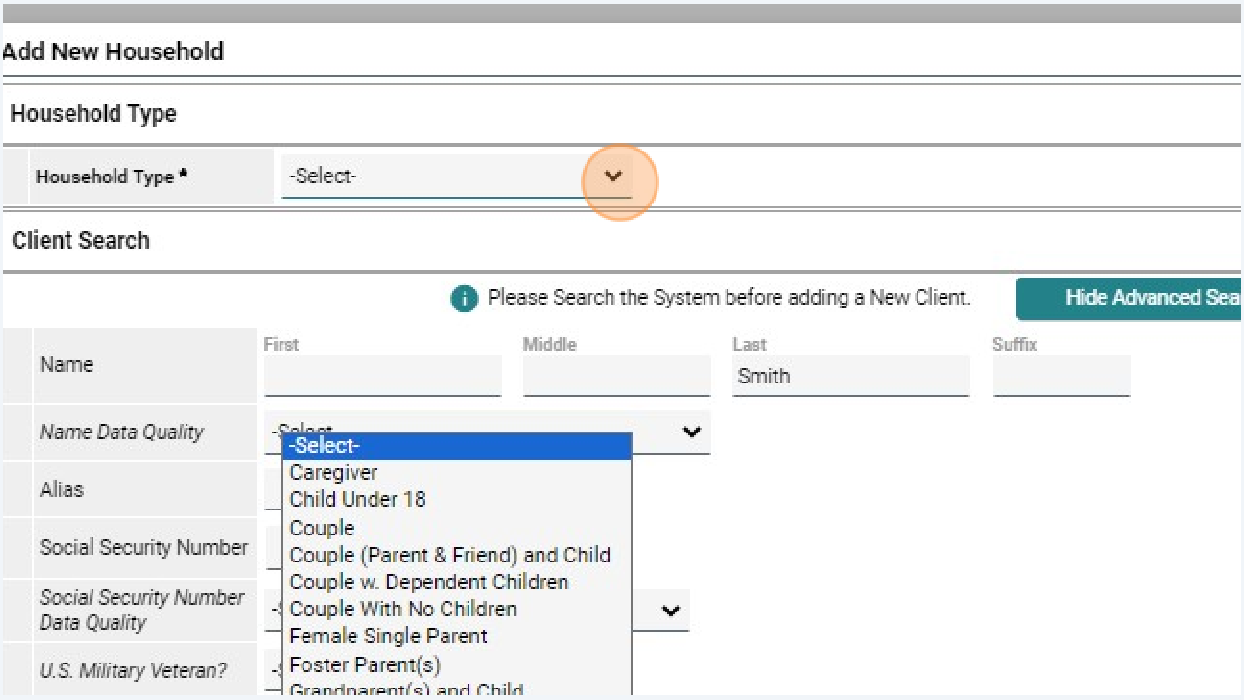
15 Next, you will need to select whether you are entering data for an Individual ("Add Client ONLY") or a Household ("Add Client and Add NEW Household").



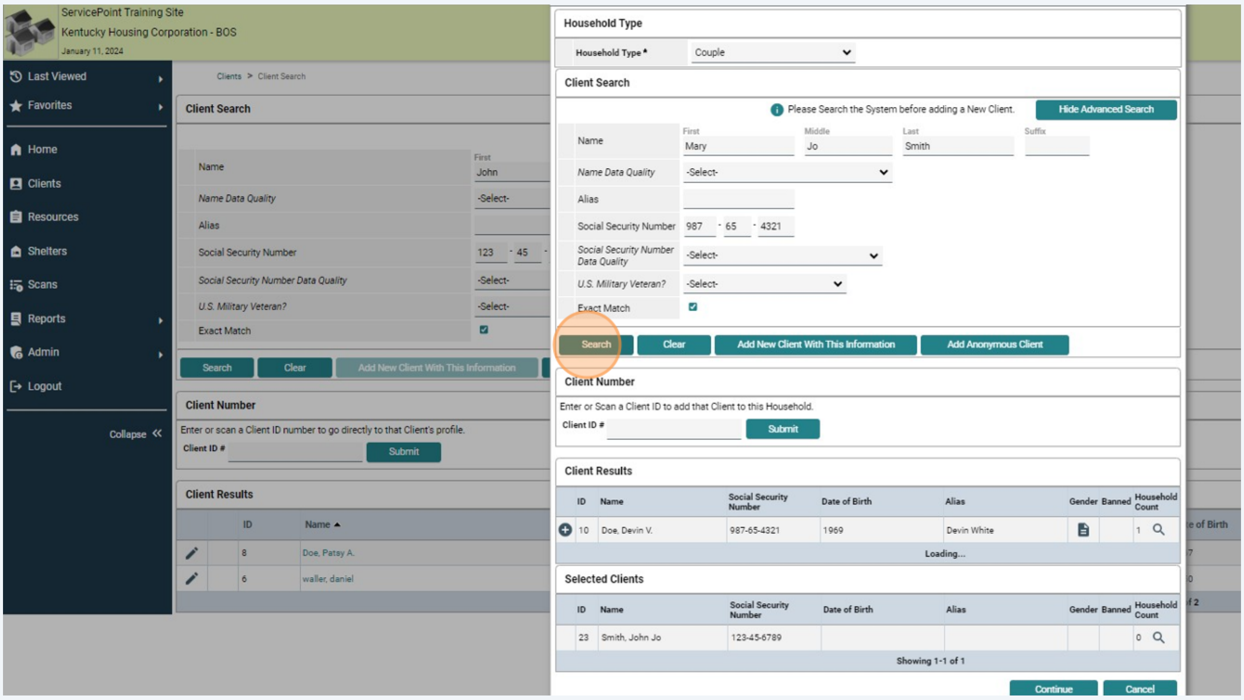
Tip!

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.

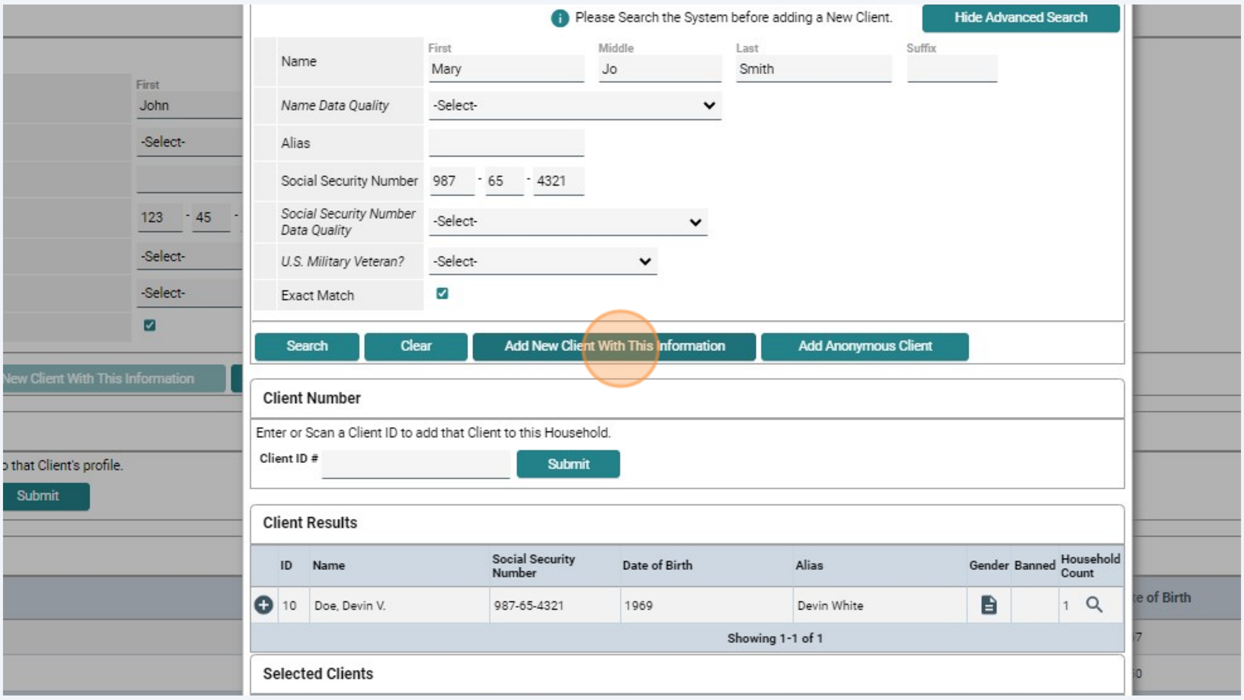
16 When the Household Pop-Up displays, select the "Household Type".



17 Search for each additional household member.

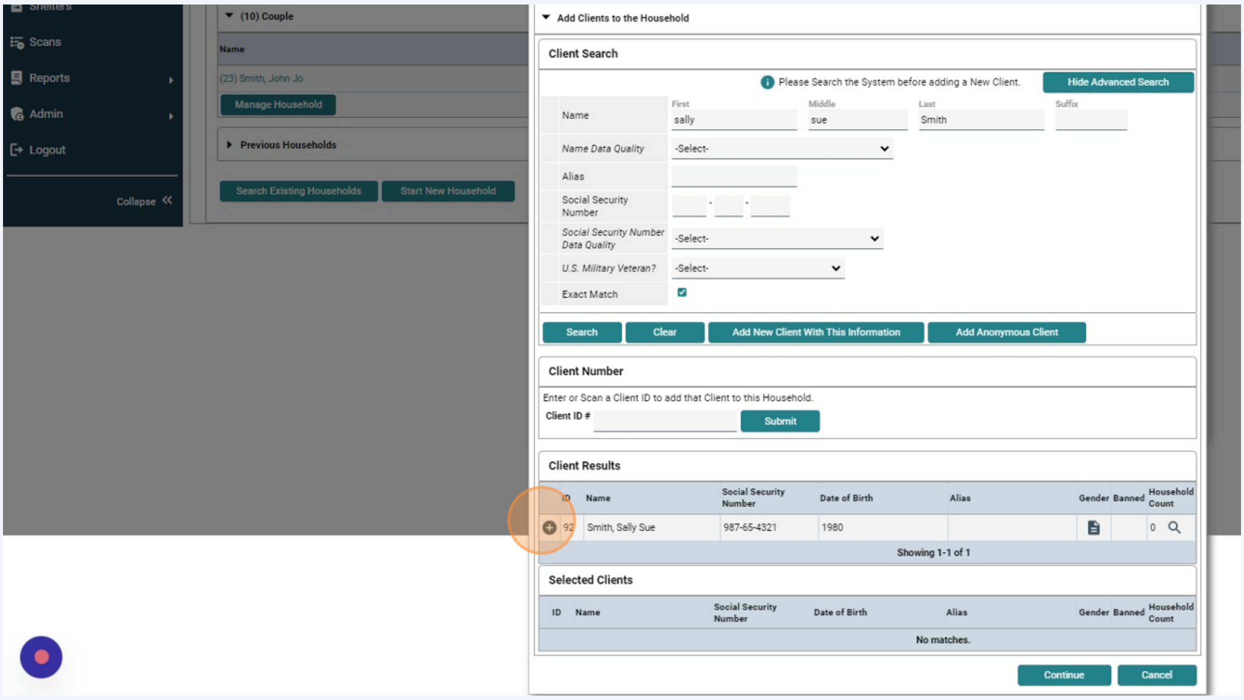


18 If the additional household member does not already exist in the database, click "Add New Client with This Information".

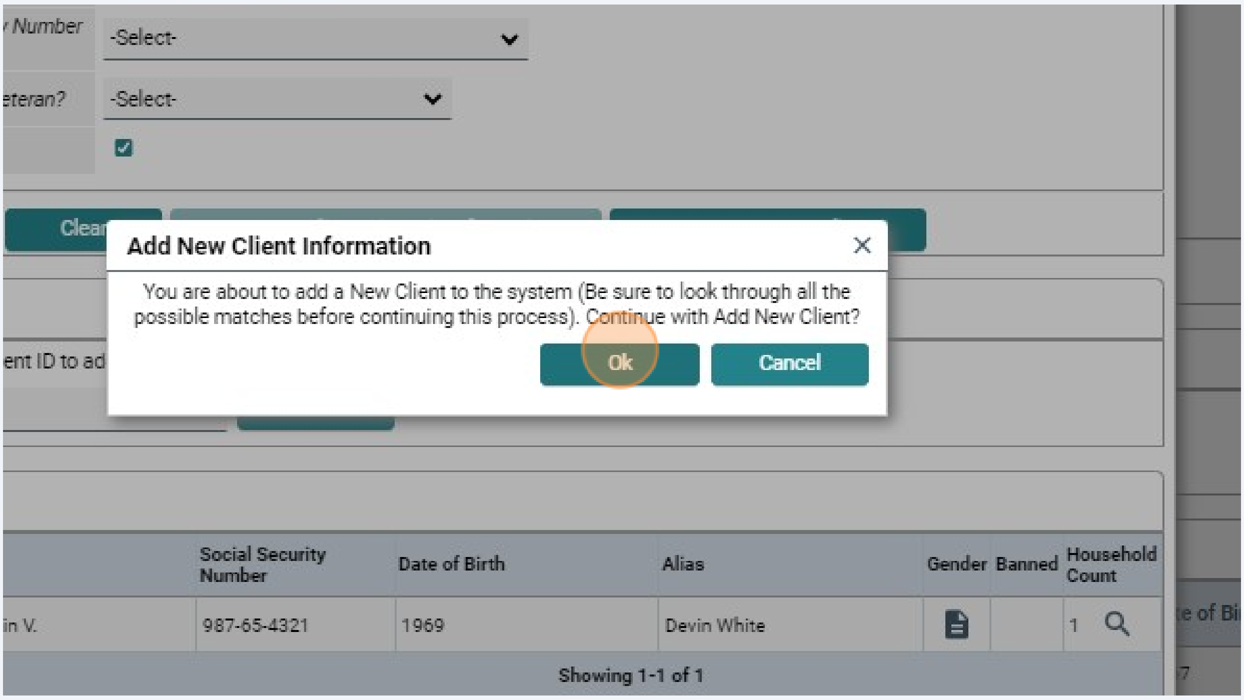


19 In this example, the household is a couple and the client already exists.

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

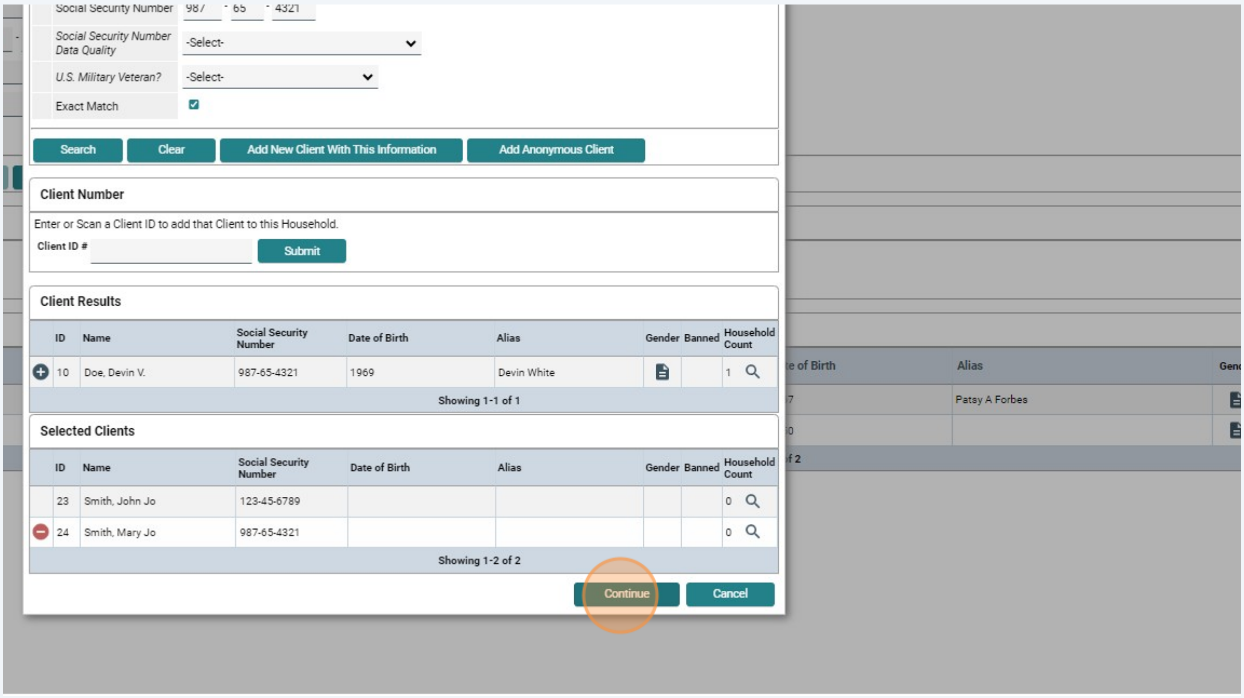


20 If you are adding a new client, a pop up will appear reminding you to search for possible client matches before continuing. Click "Ok" when ready.



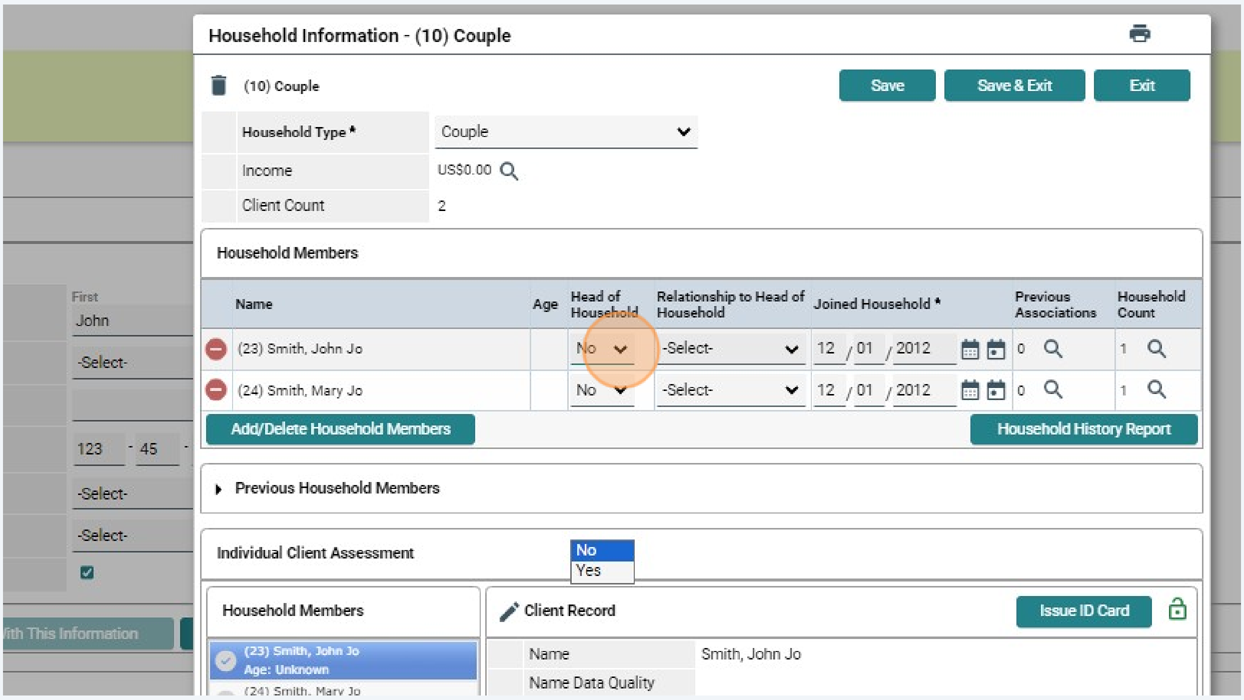
21 Clients added to the household will appear at the bottom of the page under the "Selected Clients" section.

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



22 Complete:

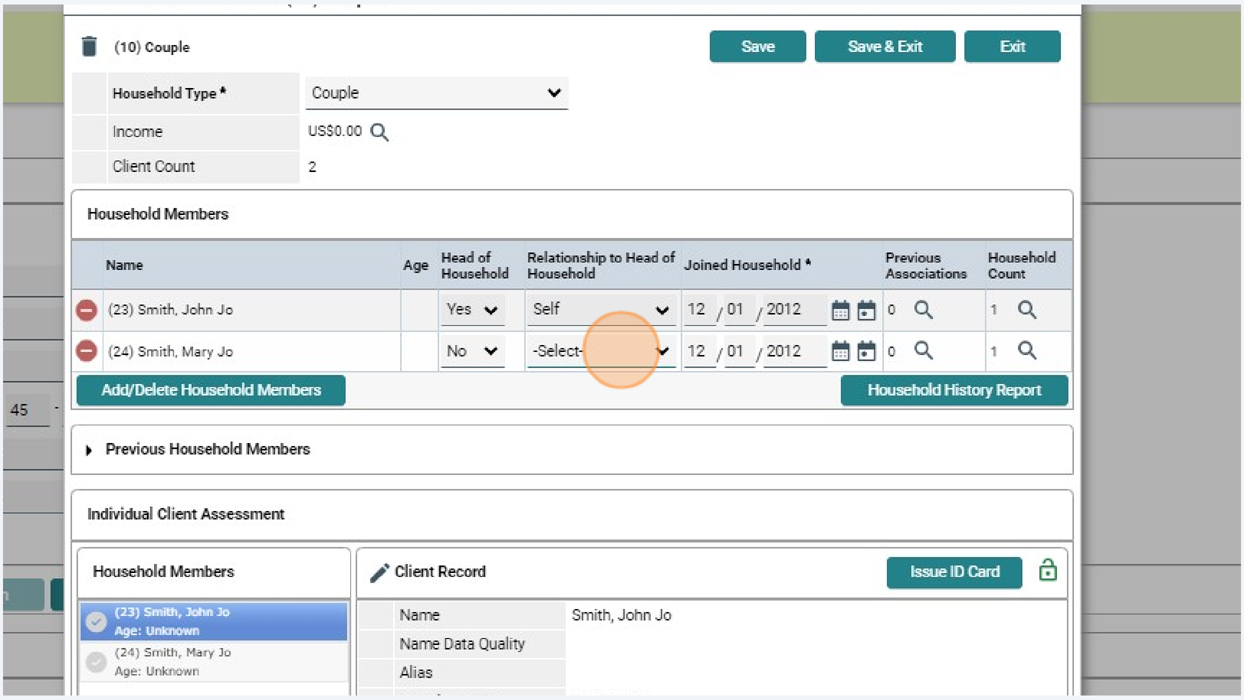
• **Head of Household-** Defaults to "No", so only change to "Yes" on the one person that is the Head of Household.



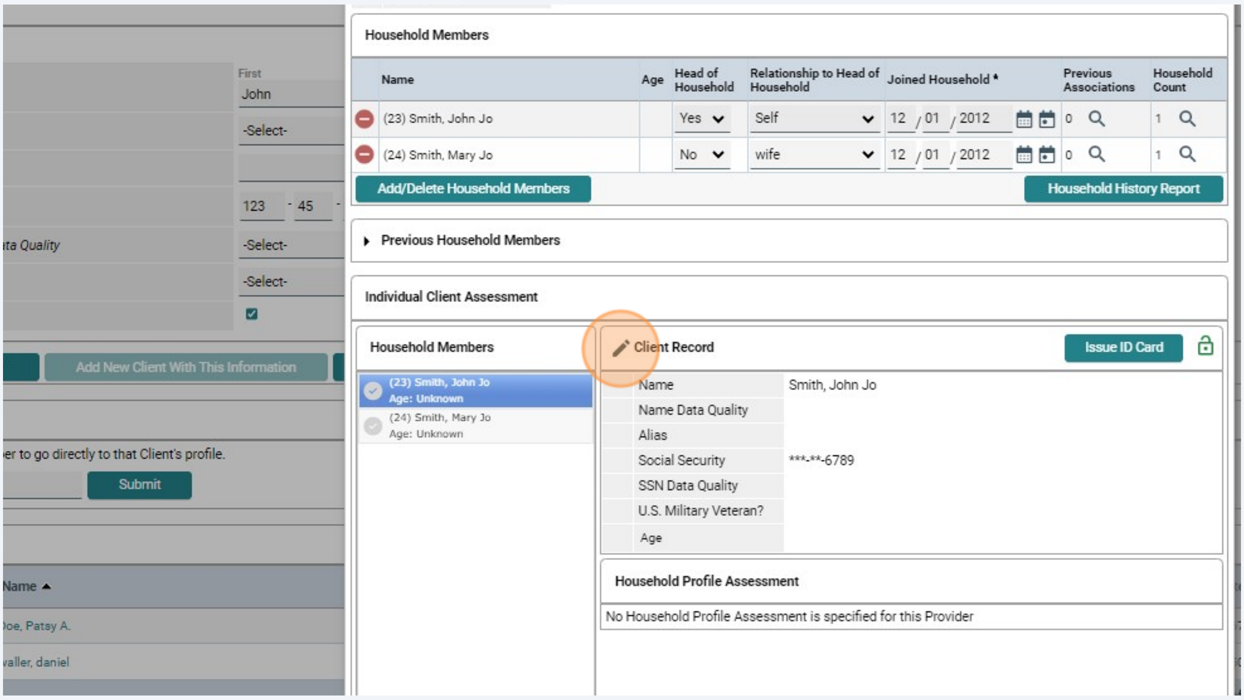
23 Complete:

• **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.*



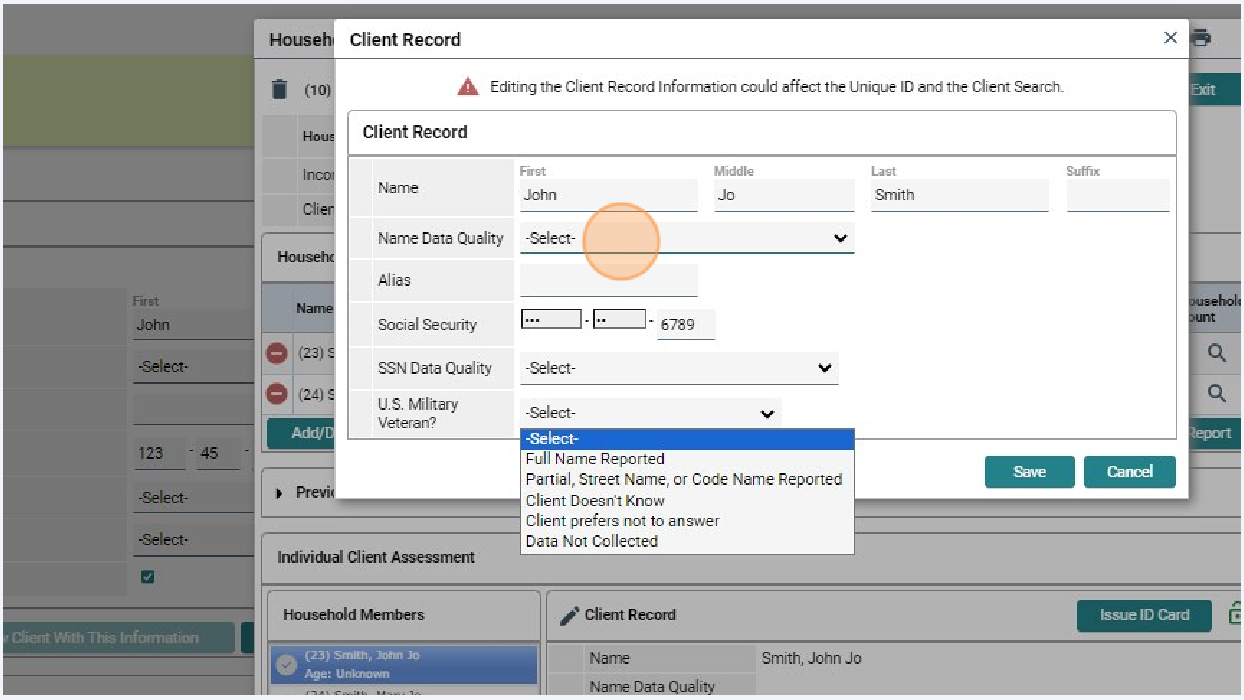
24 Click the pencil (edit button) to add, edit, or update the information for the Head of Household.



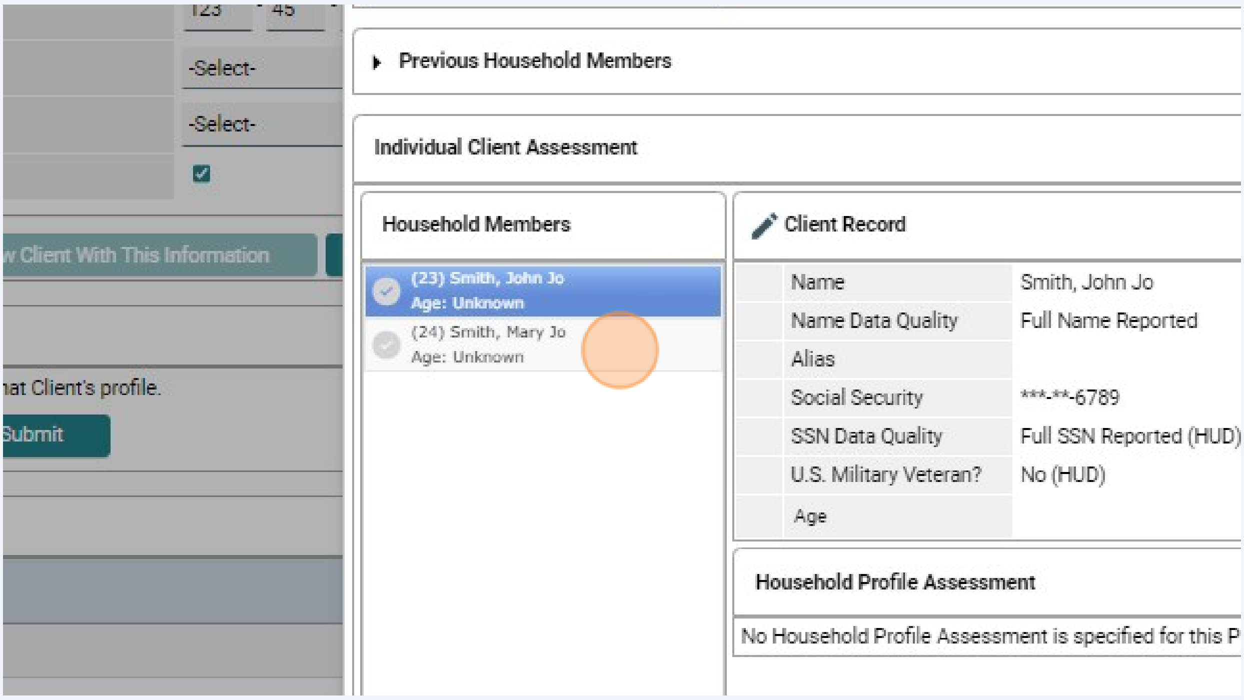
Alert!

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

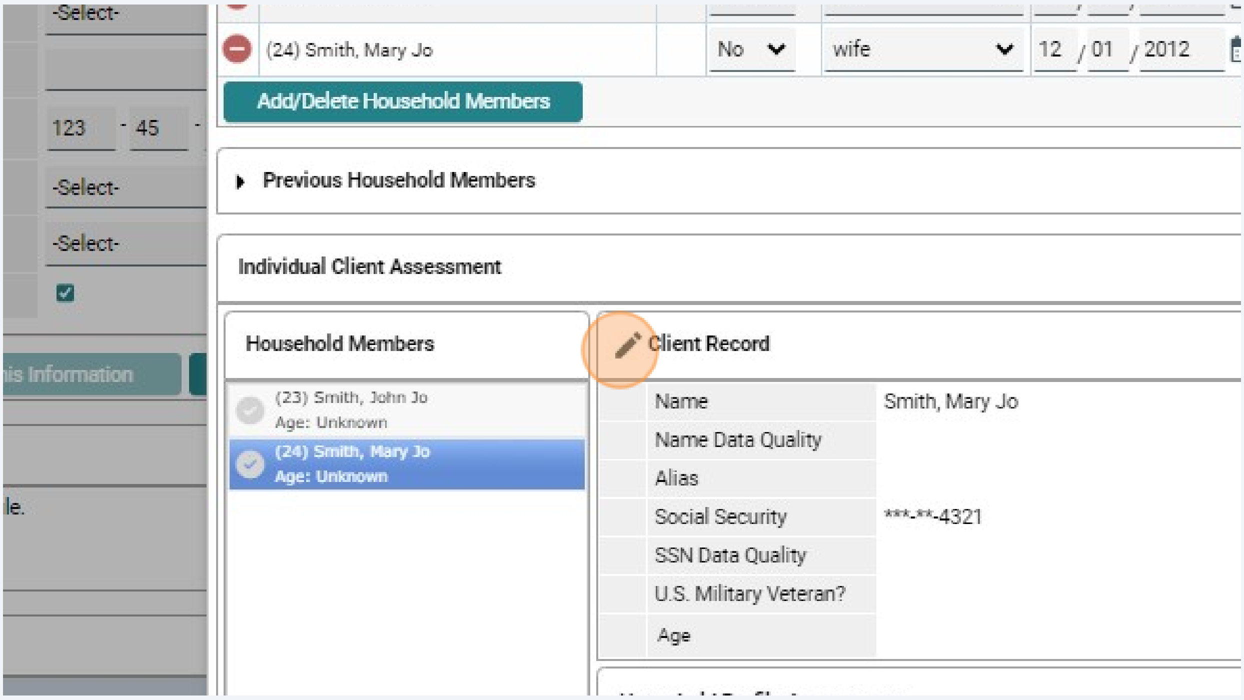
25 Fill in the Client Record as prompted & click "Save".



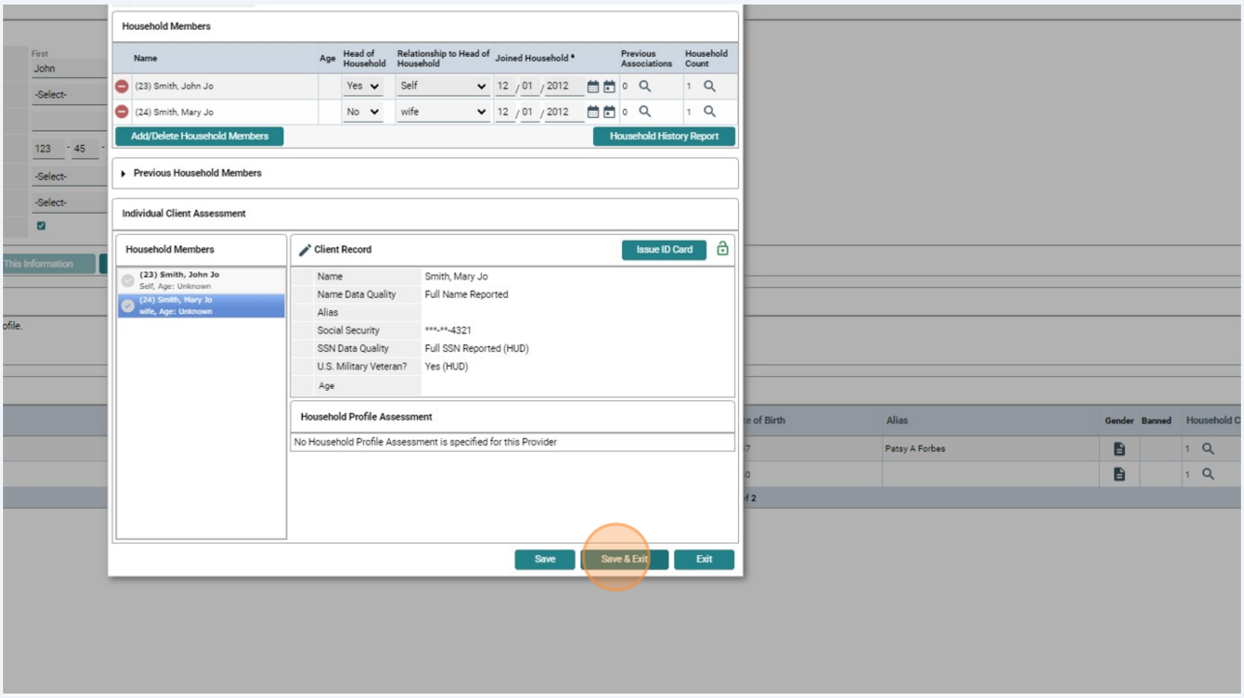
26 Click on the next household member from the menu, then click the pencil (edit button) to add, edit, or update the information.



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



28 Click "Save & Exit".



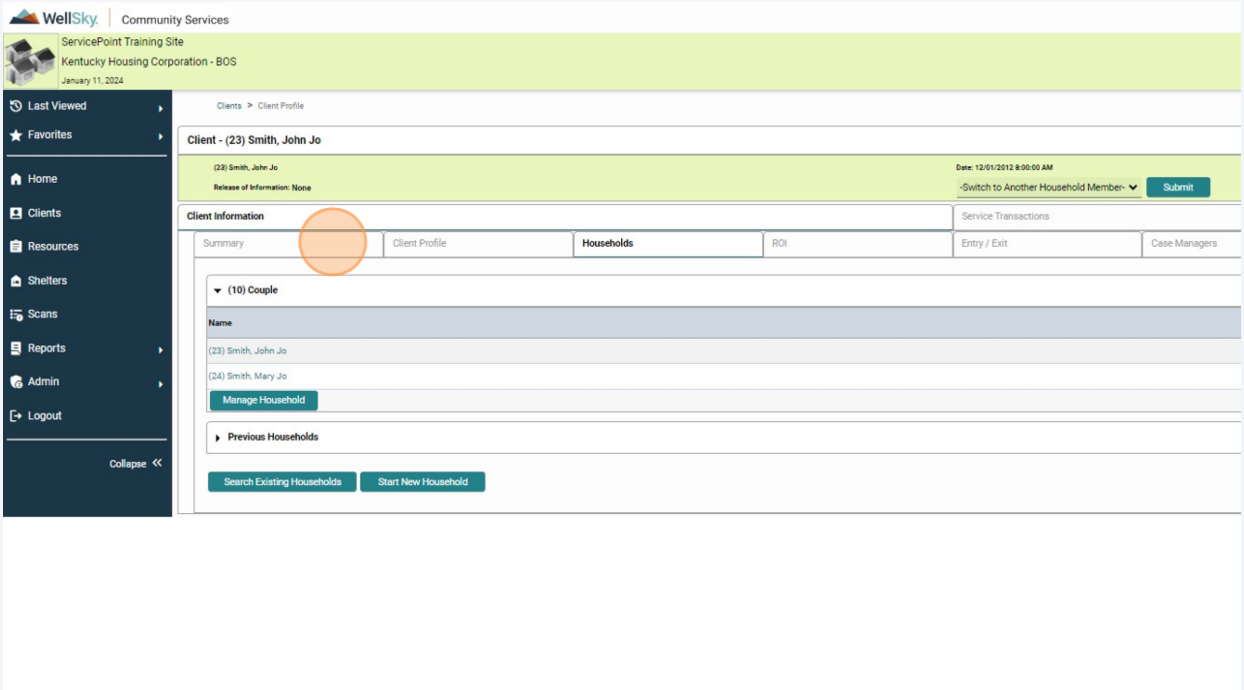
Tip!

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

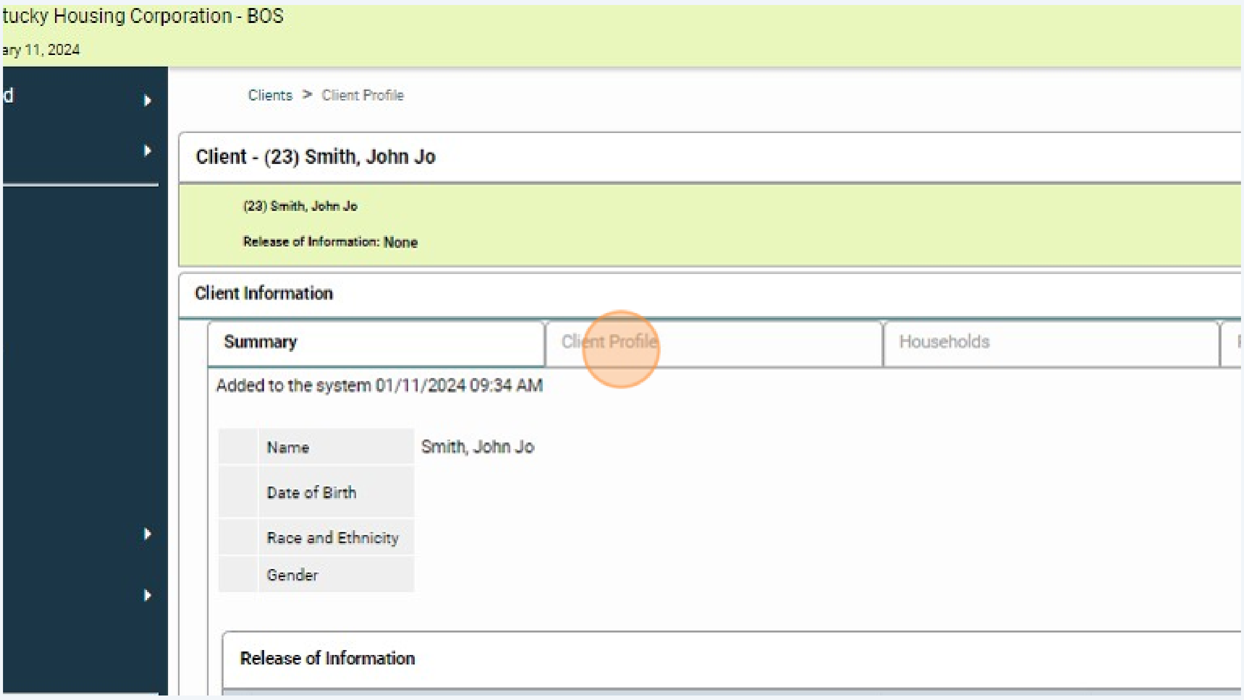
Client Information

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.

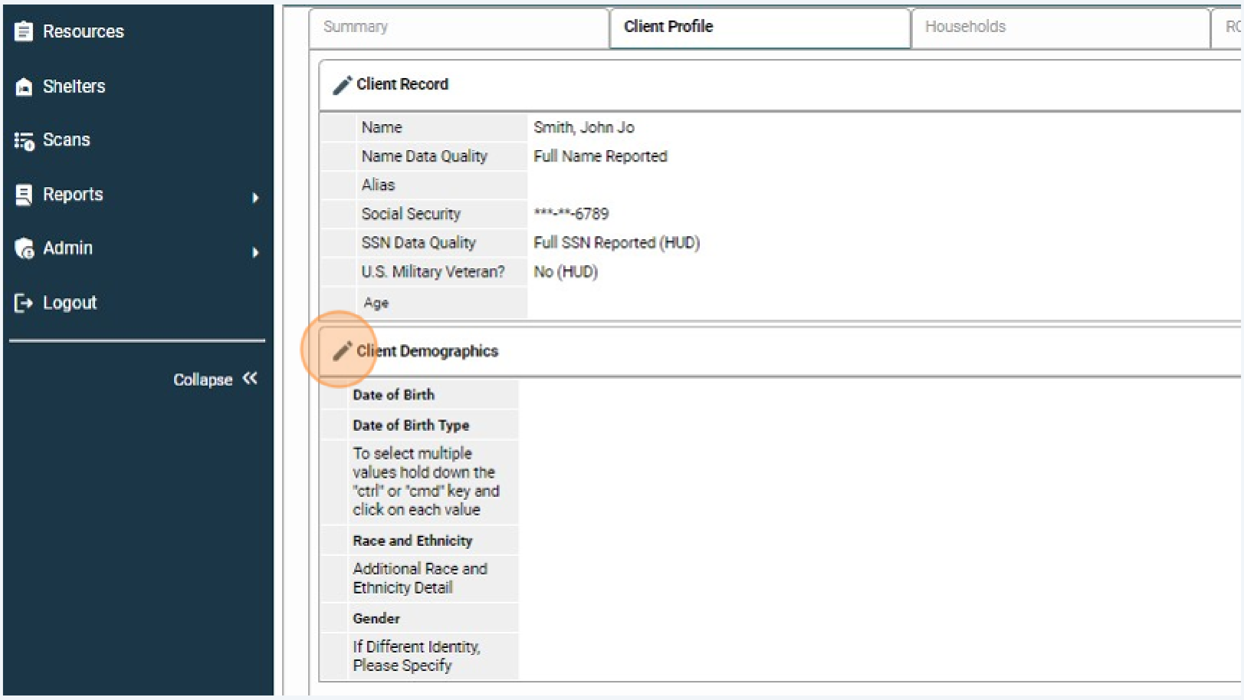
You will want to work from left to right in order through the tabs, filling in information. The "Summary" tab gives a snapshot of the Client Record & usually will not need updates.



30 First, click "Client Profile".



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



Alert!

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

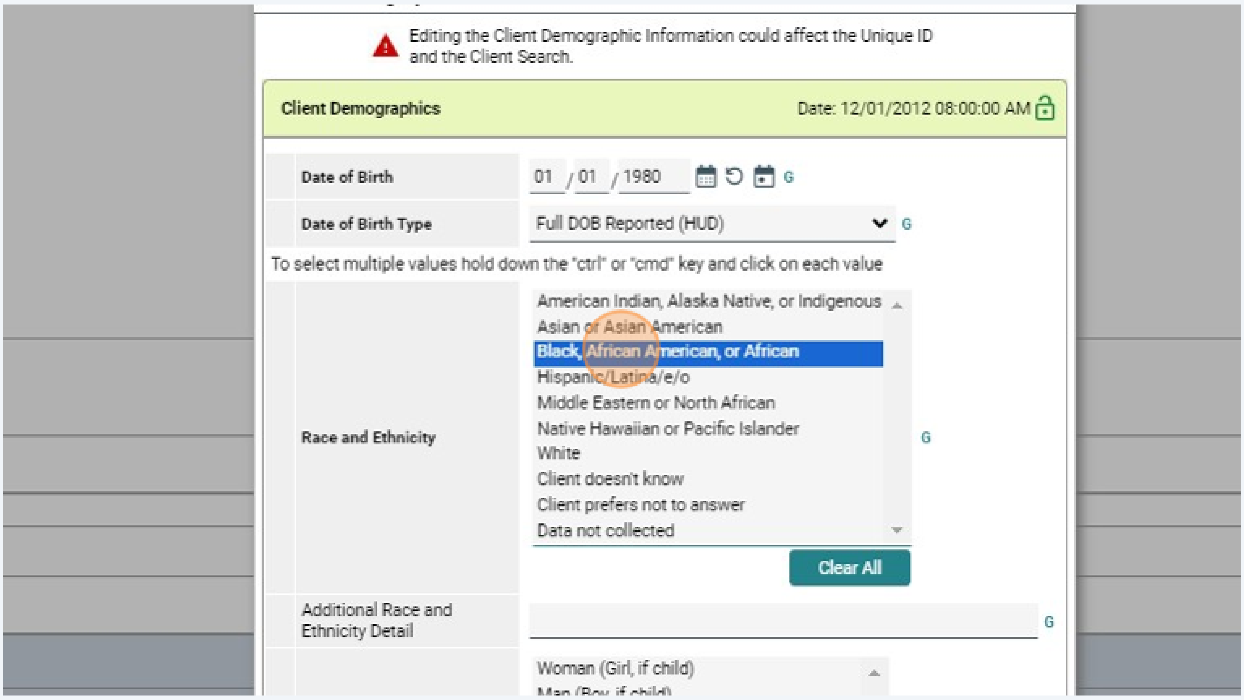
Tip!

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.

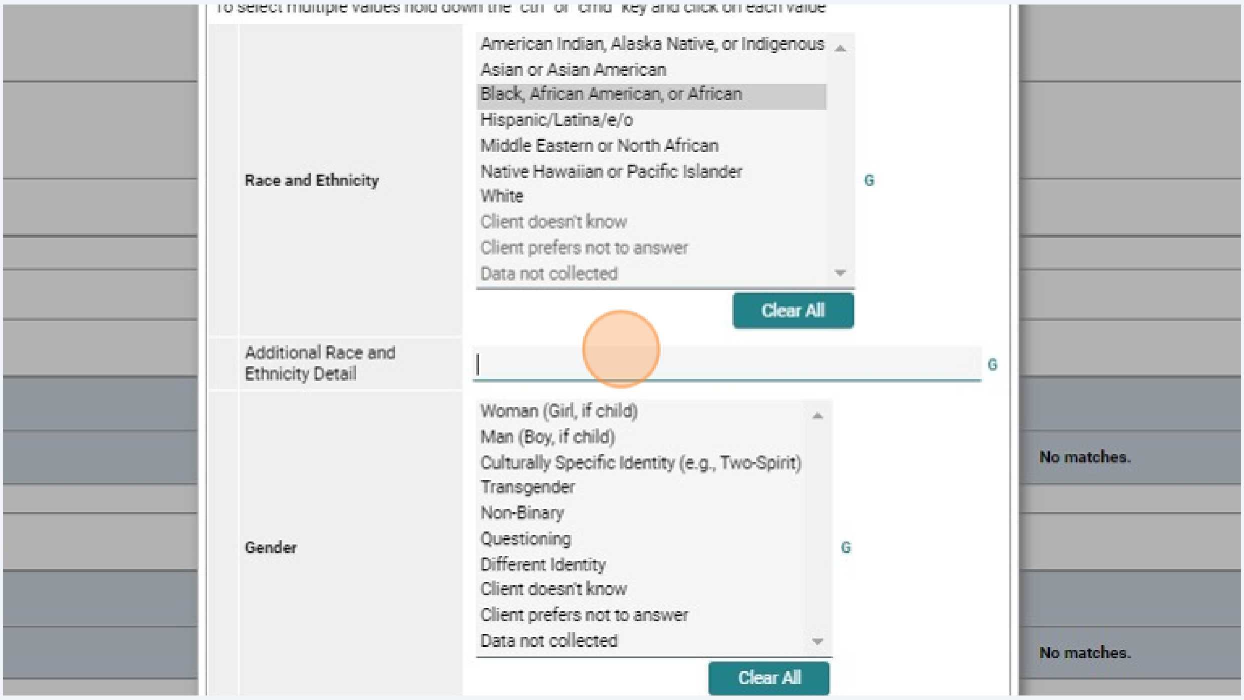
32 Fill in the Client Profile as prompted & click "Save".



Tip!

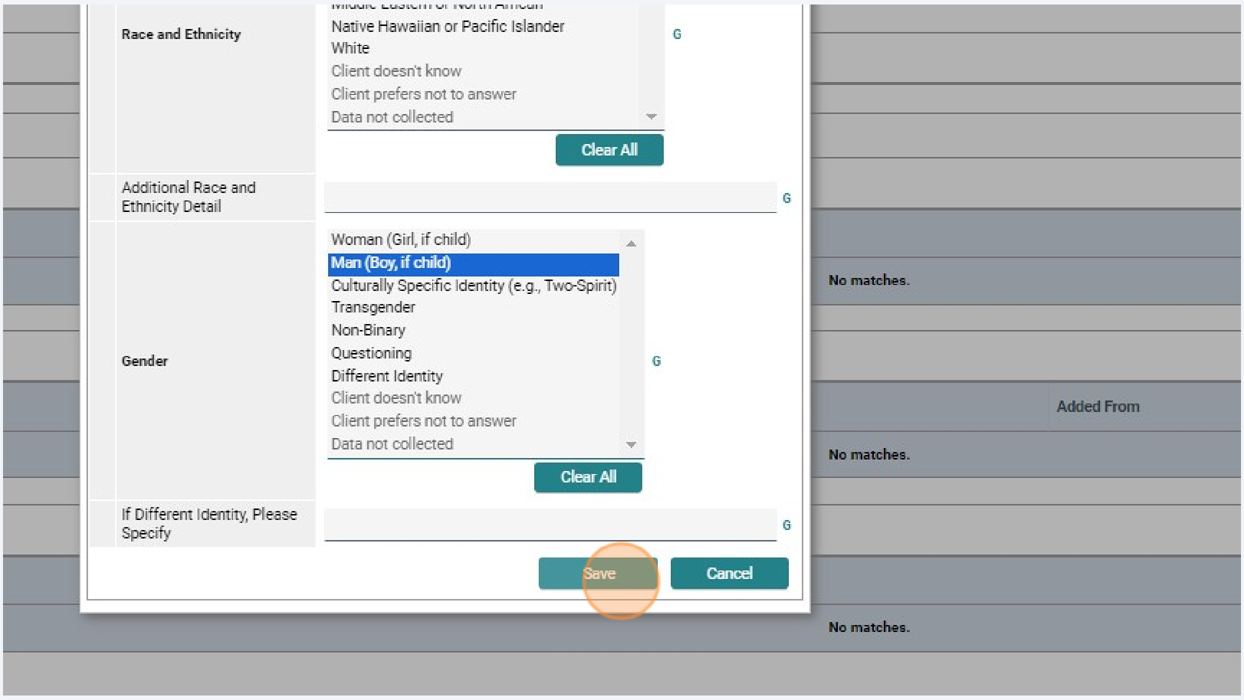
Clients can select as many "Race and Ethnicity" options as desired by using the "Control" command when selecting your responses.

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



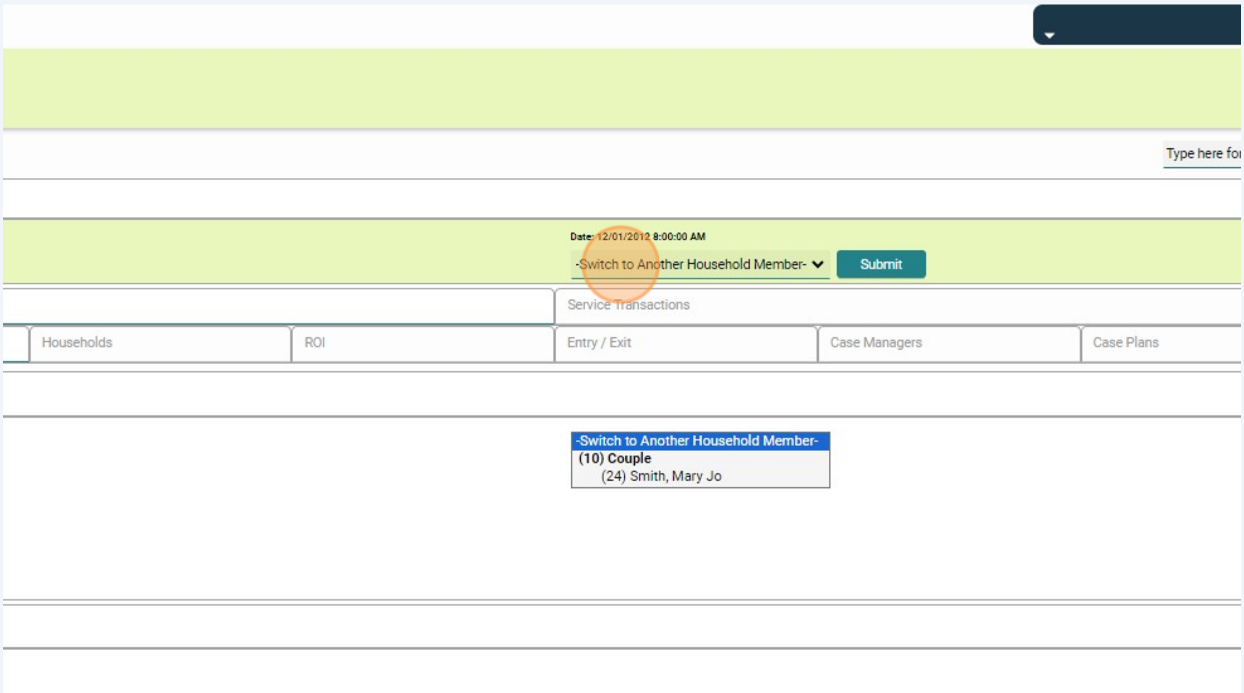
34 Clients can also select as many "Gender" options as desired by using the "Control" command when selecting your responses.

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

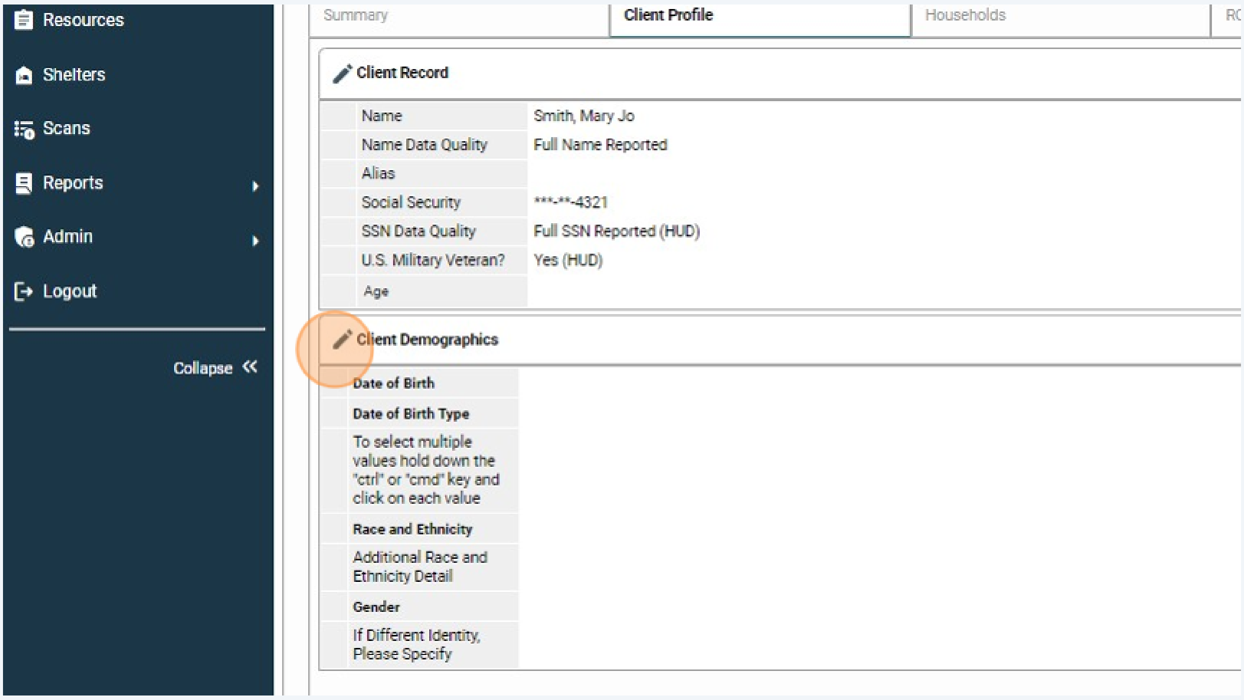


35 Before moving forward, if you have additional household members, you will want to utilize this button to "Switch to Another Household Member".

Then click "Submit".



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

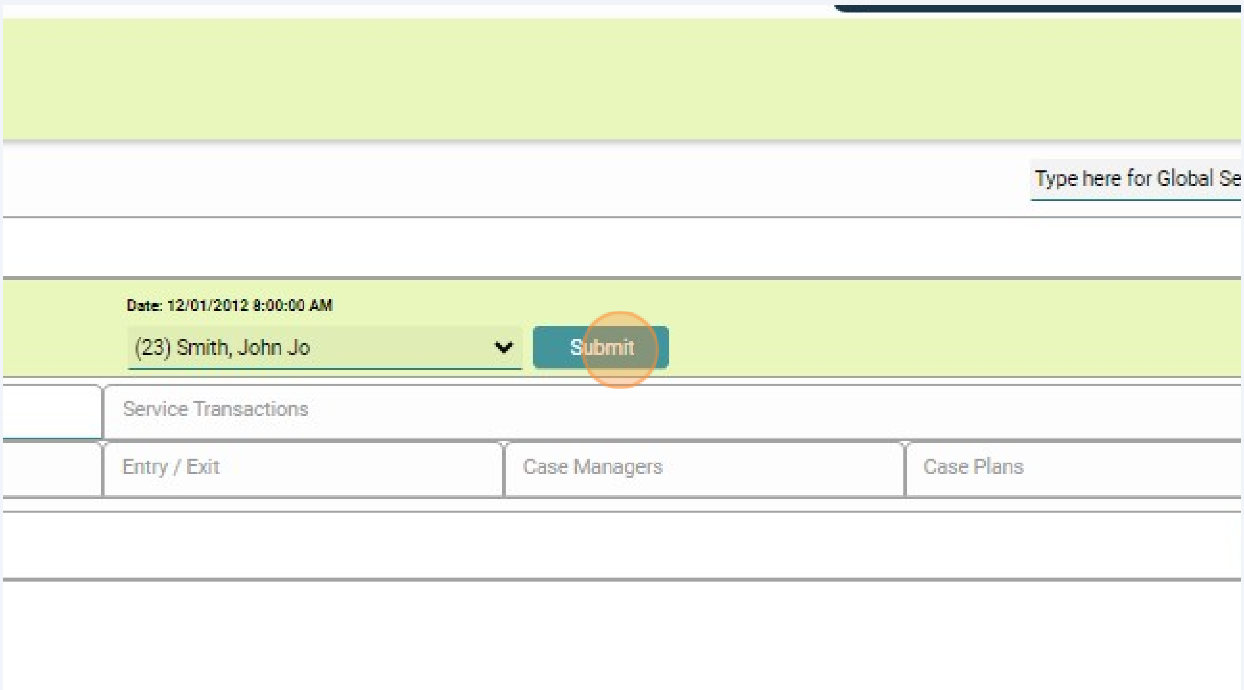


Alert!

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.*

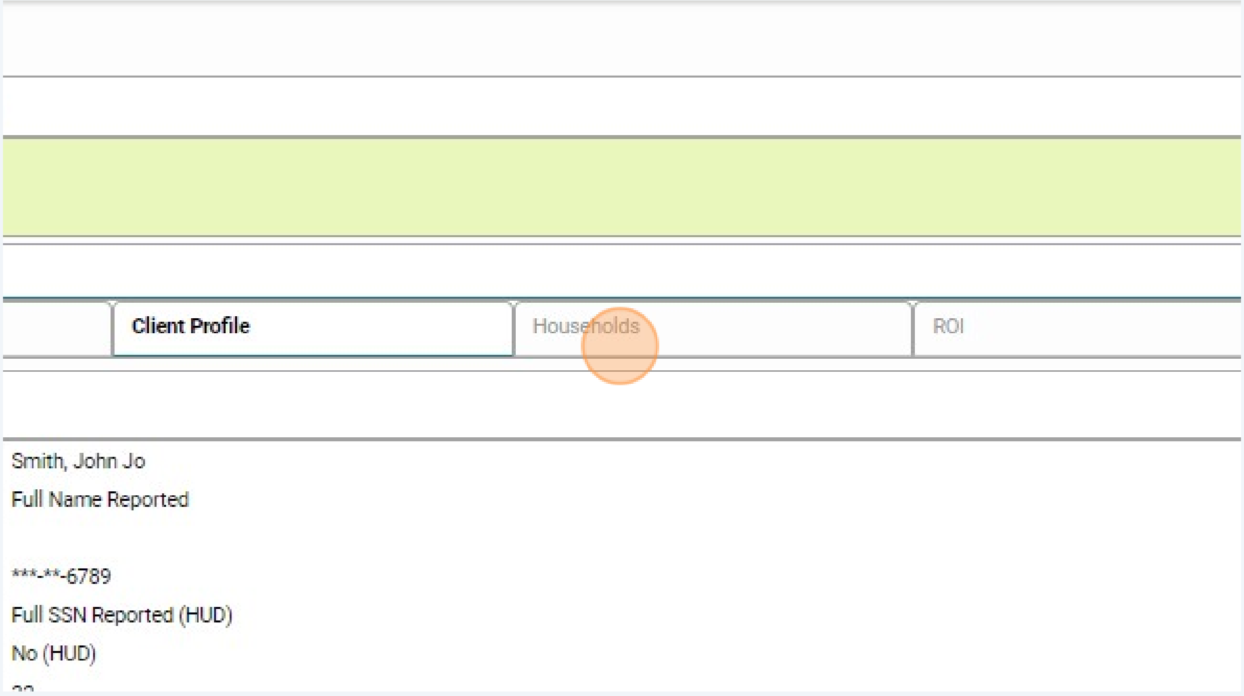
37 Next, utilize the "Switch to Another Household Member" feature to switch back to the Head of Household (HoH).

Then click "Submit".



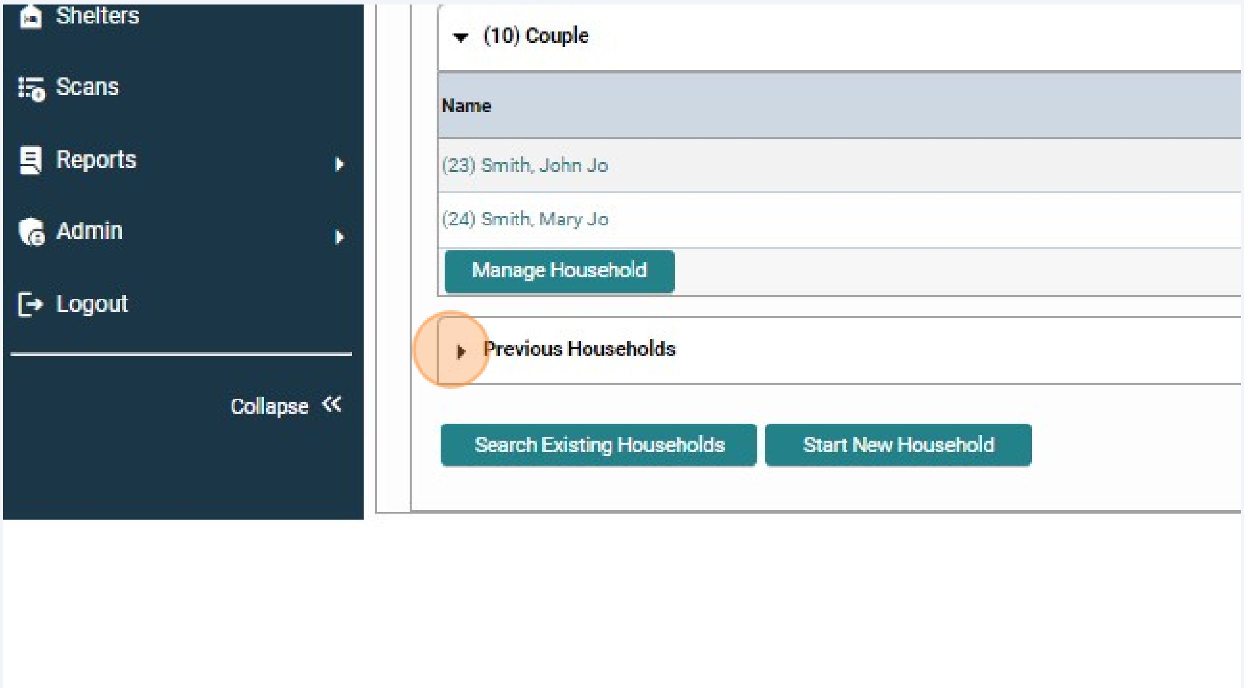
38 Continue moving left to right across the tabs. The next tab is the "Households" tab. You will want to review the information on this tab to ensure the information is correct.

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

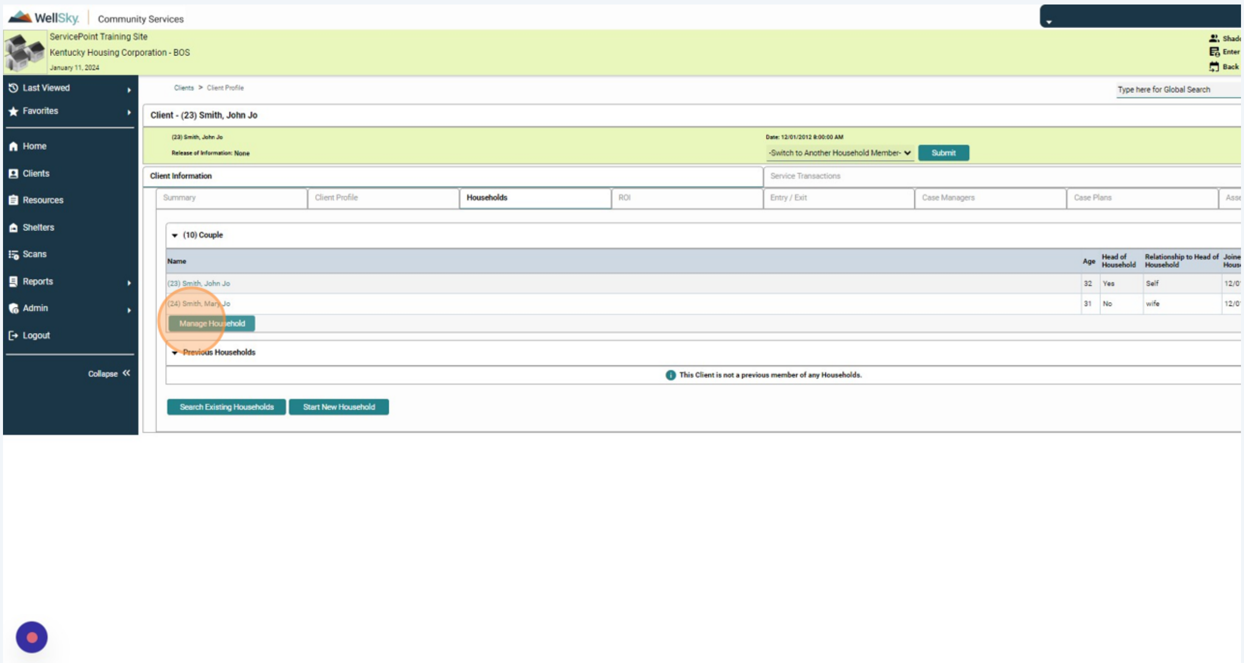


39 You can click on "Previous Households" to see any households in HMIS that the client has been apart of before (if they were already in the system).

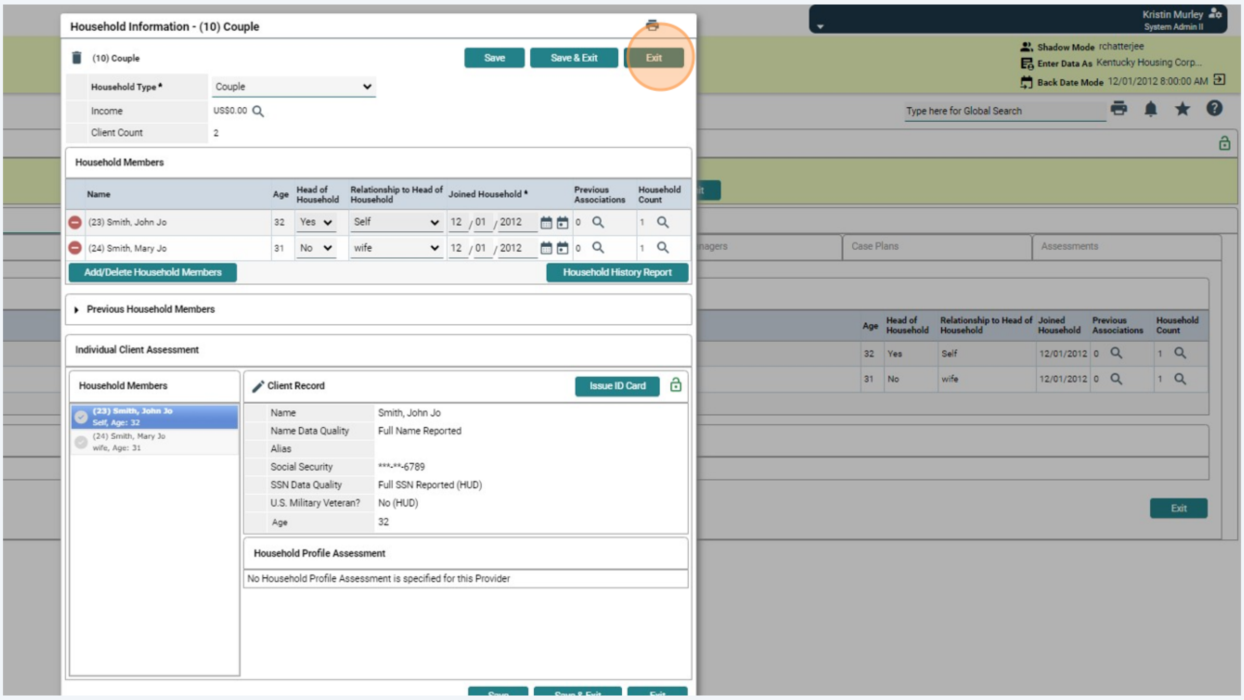
To add a Household, click "Start New Household".



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".



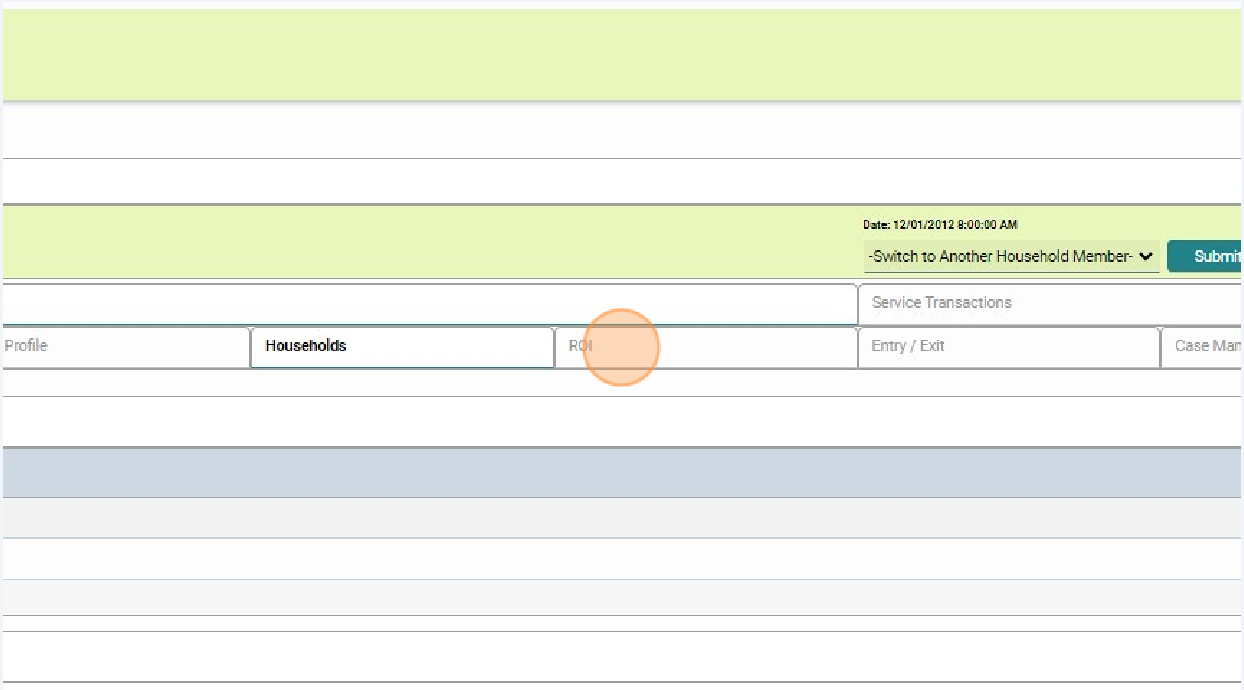
41 When you are satisfied with the Household information, click "Exit".



Release of Information (ROI)

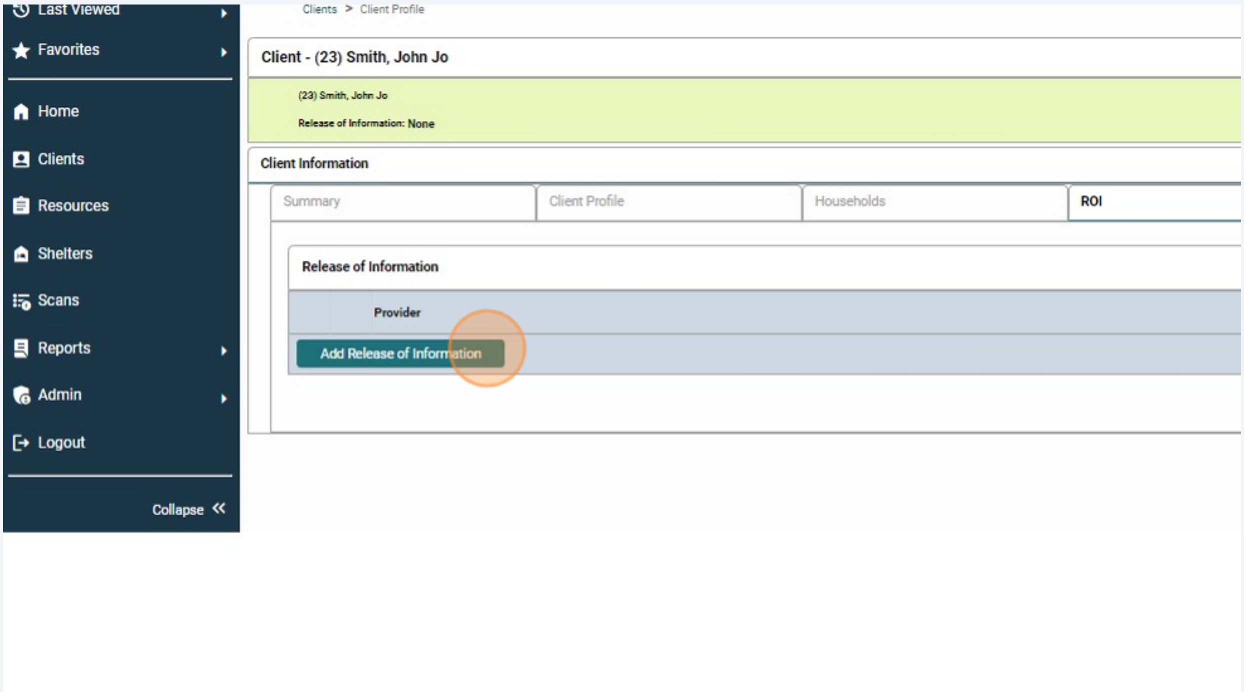
42 The next tab moving left to right is ROI.

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

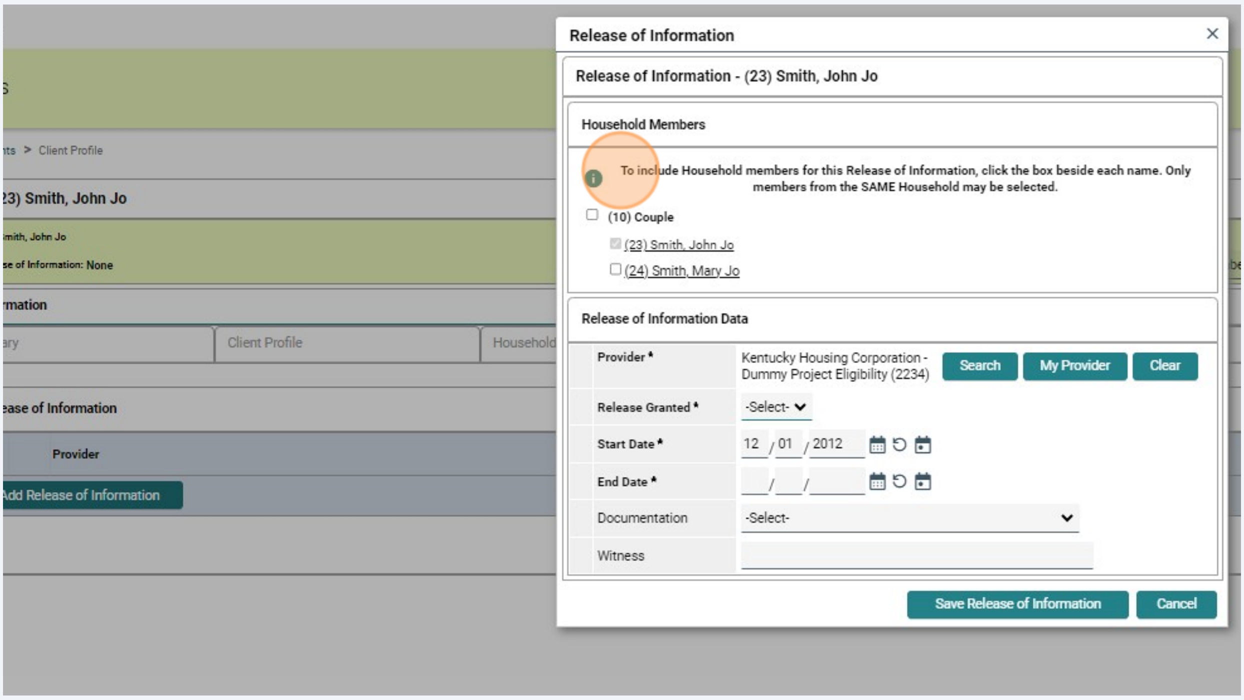


43 Go to the ROI tab while in the Client Record.

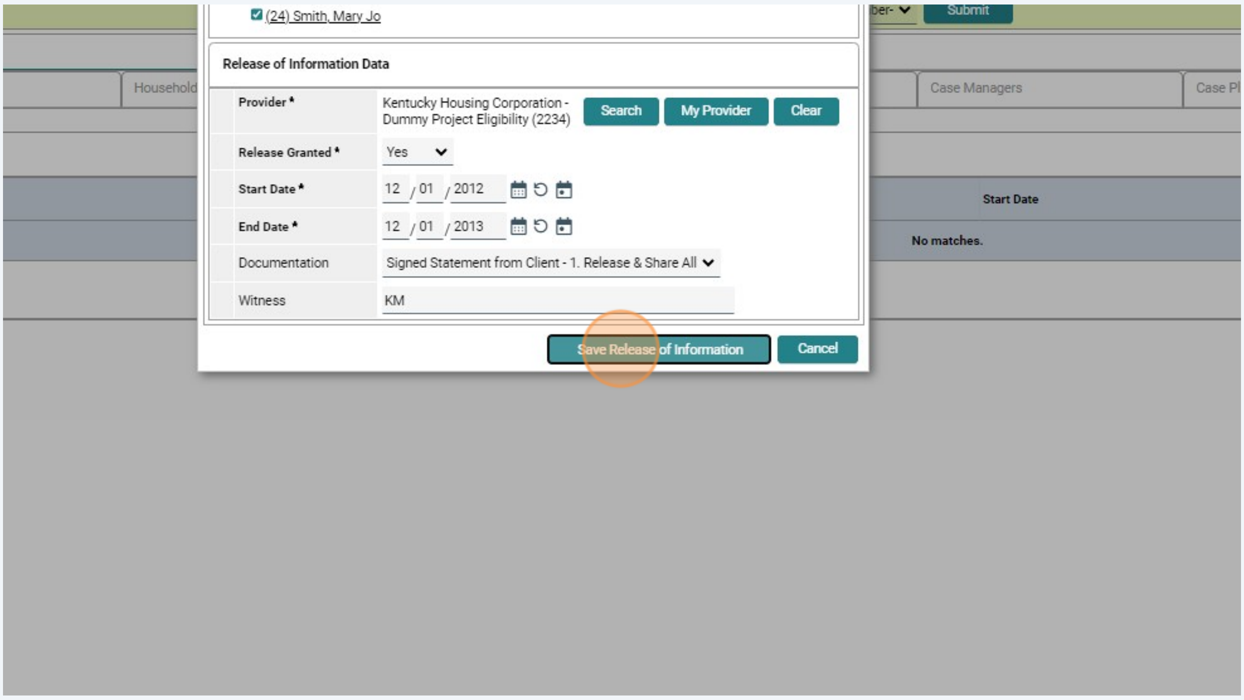
Click "Add Release of Information".



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".



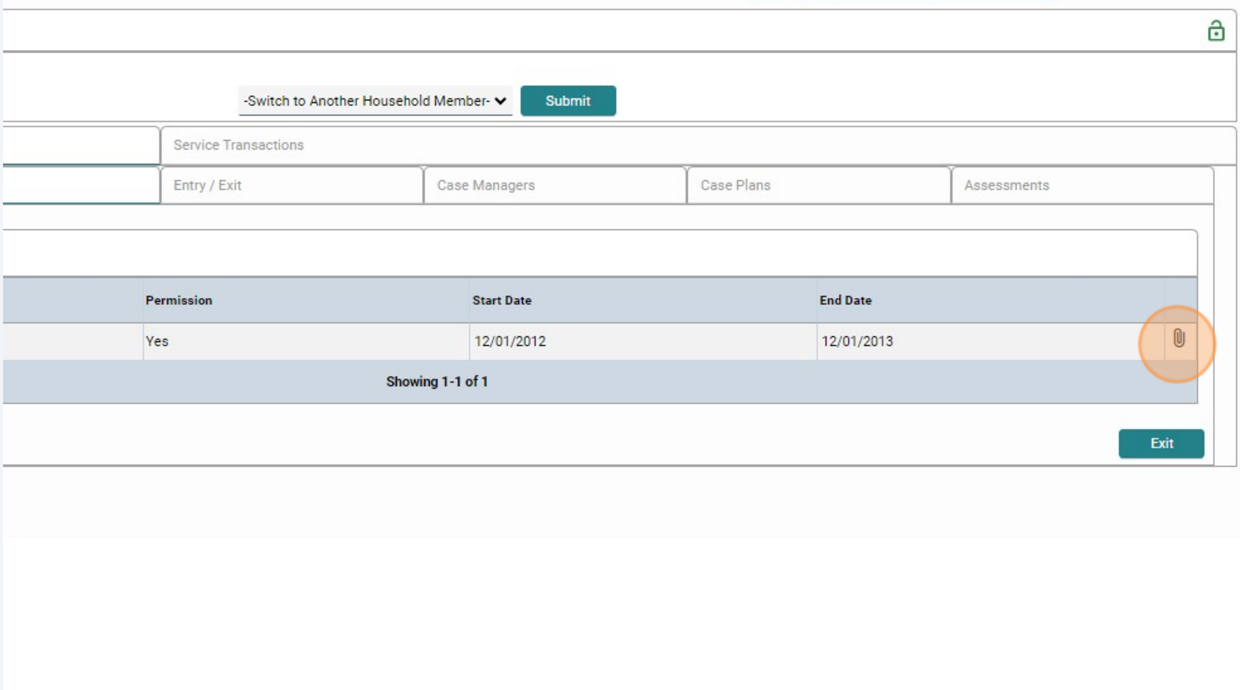
Alert!

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.*

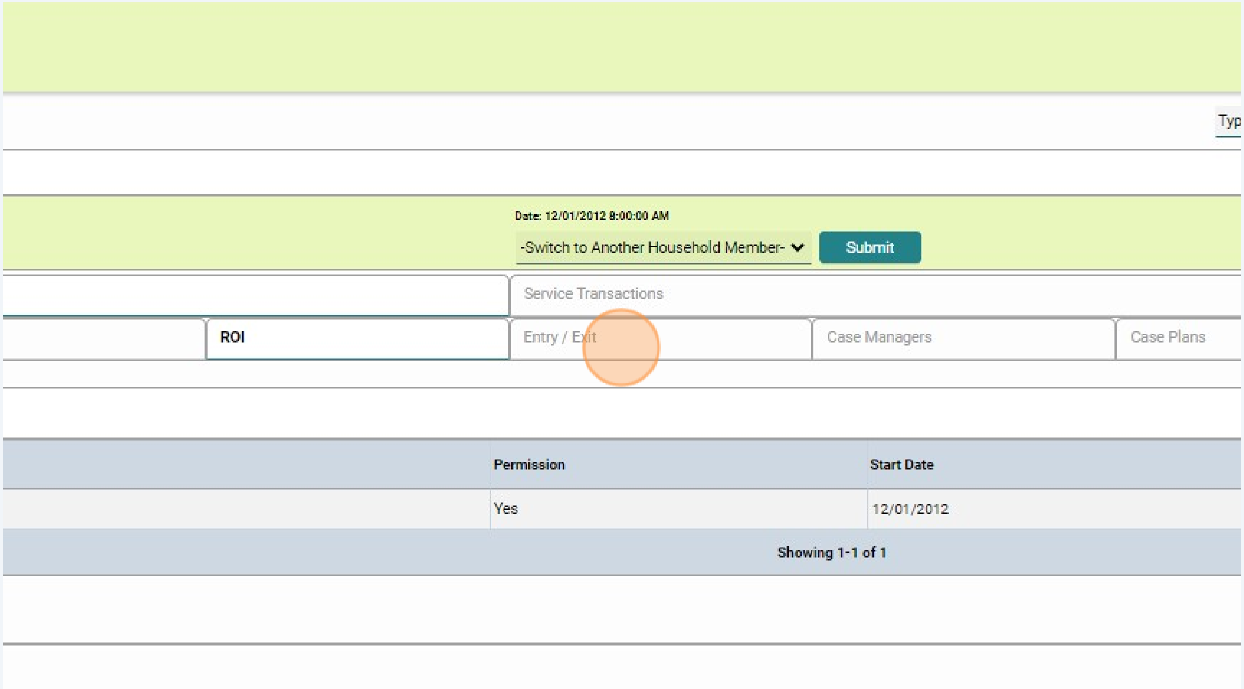
ROIs are good for one (1) calendar year.

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

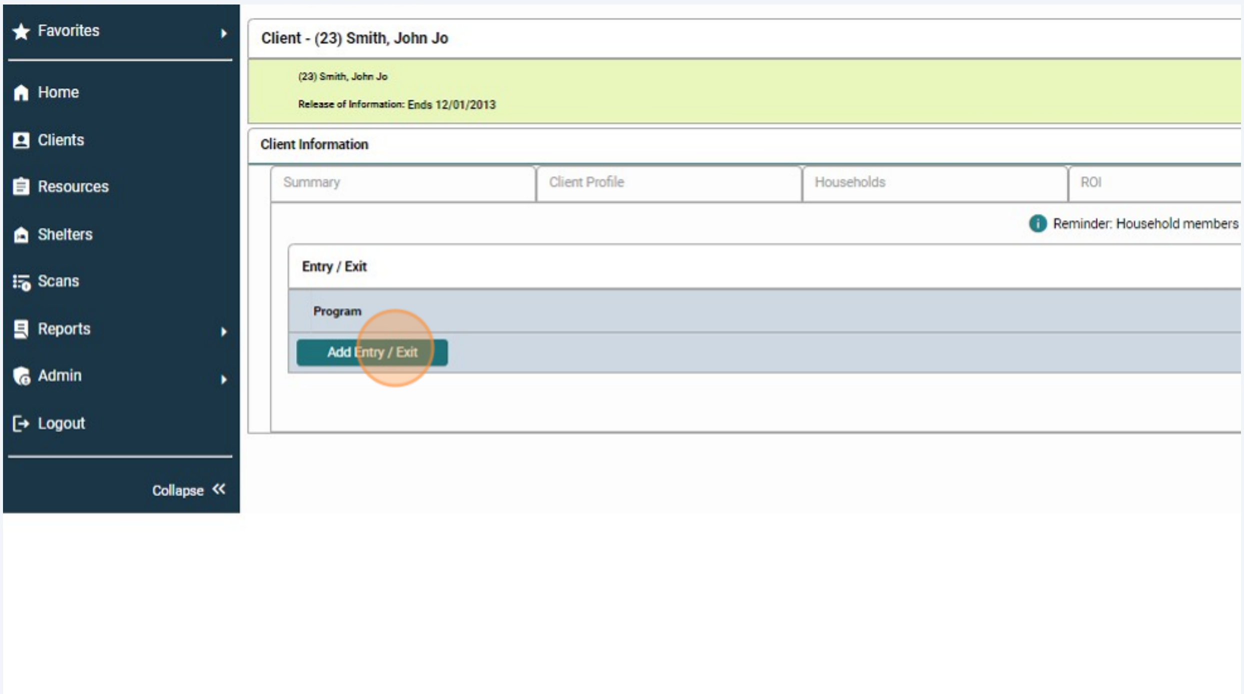


Project Entry

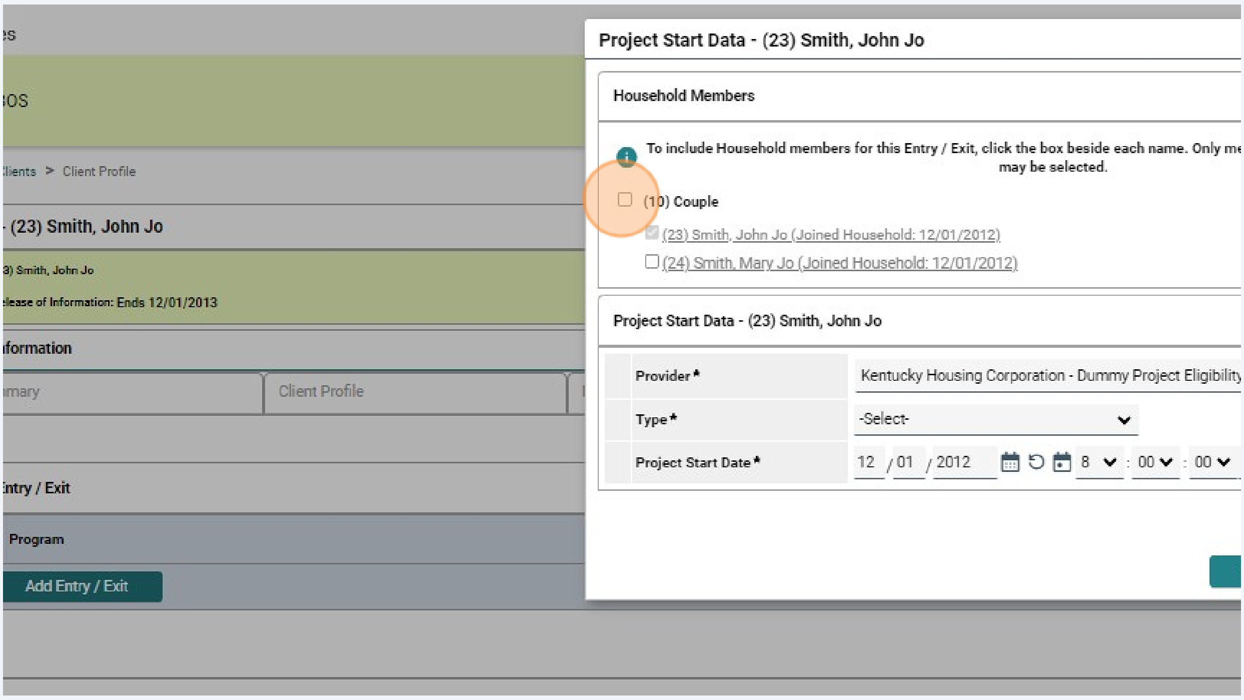
47 Select the Entry/Exit tab.



48 Select the "Add Entry/Exit" button.

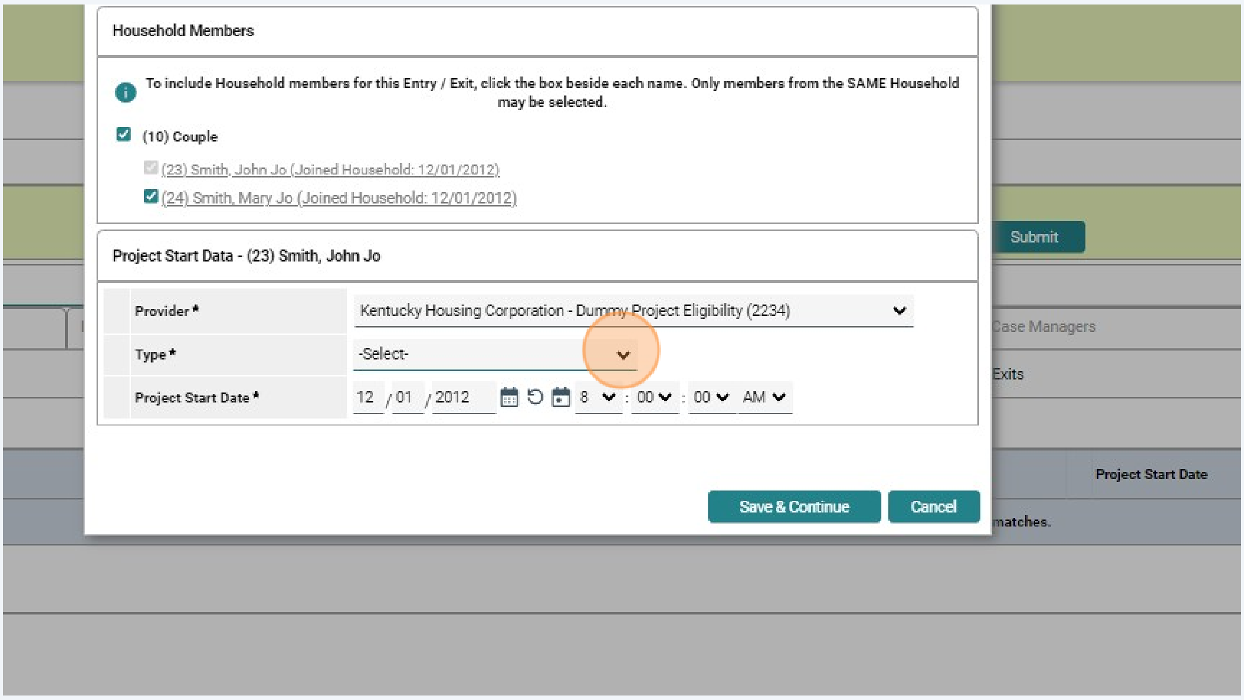


49 Select all household members that will be entered into the program as appropriate.



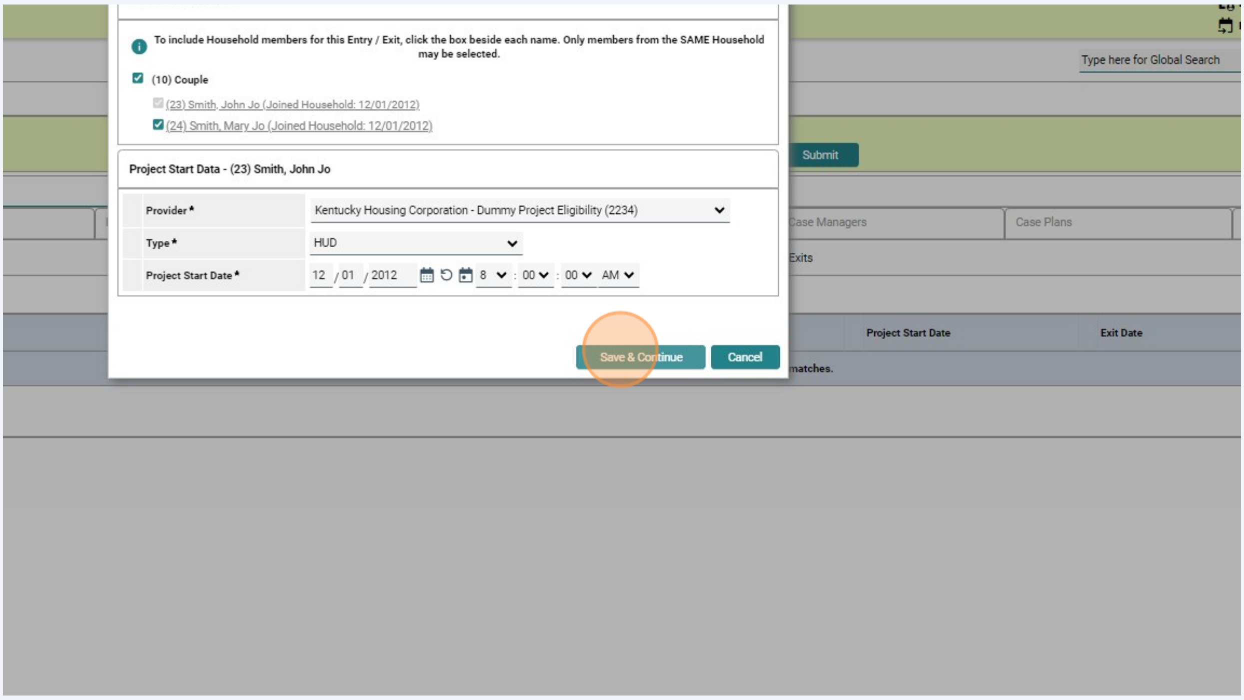
50 Provider is defaulted to the project that you're using as your Enter Data As (EDA).

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



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

Click "Save & Continue".

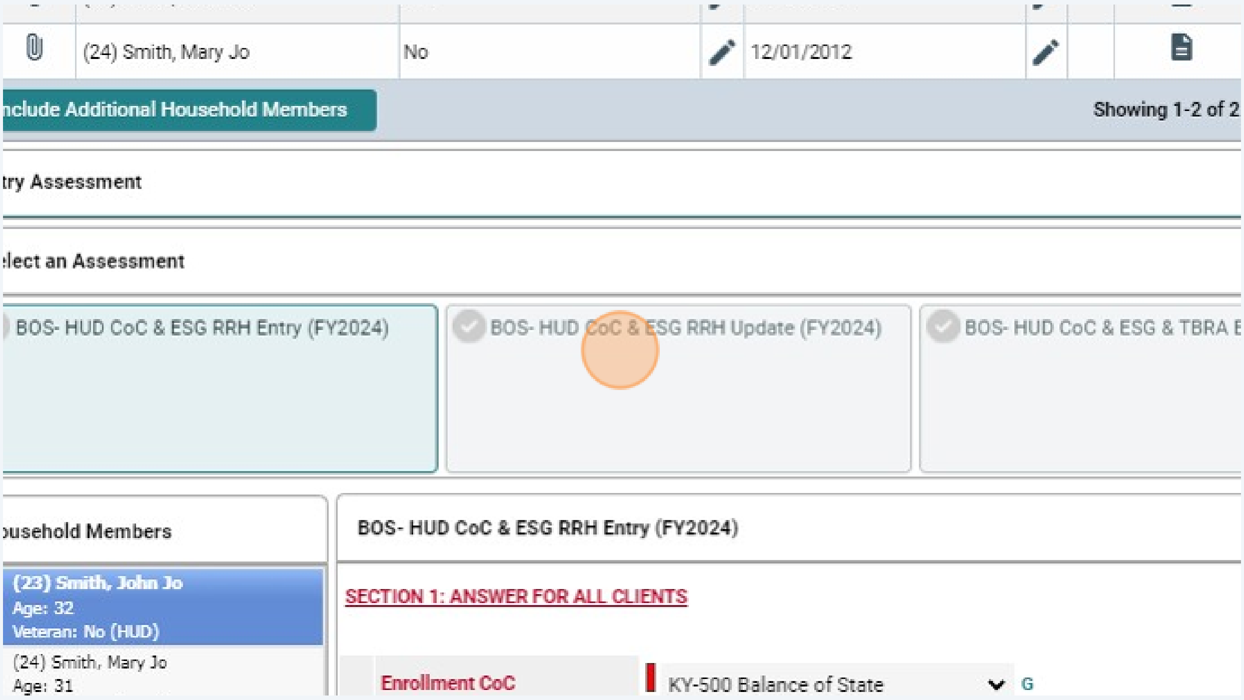


⚠ **Alert!**

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.



Entry Assessment

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

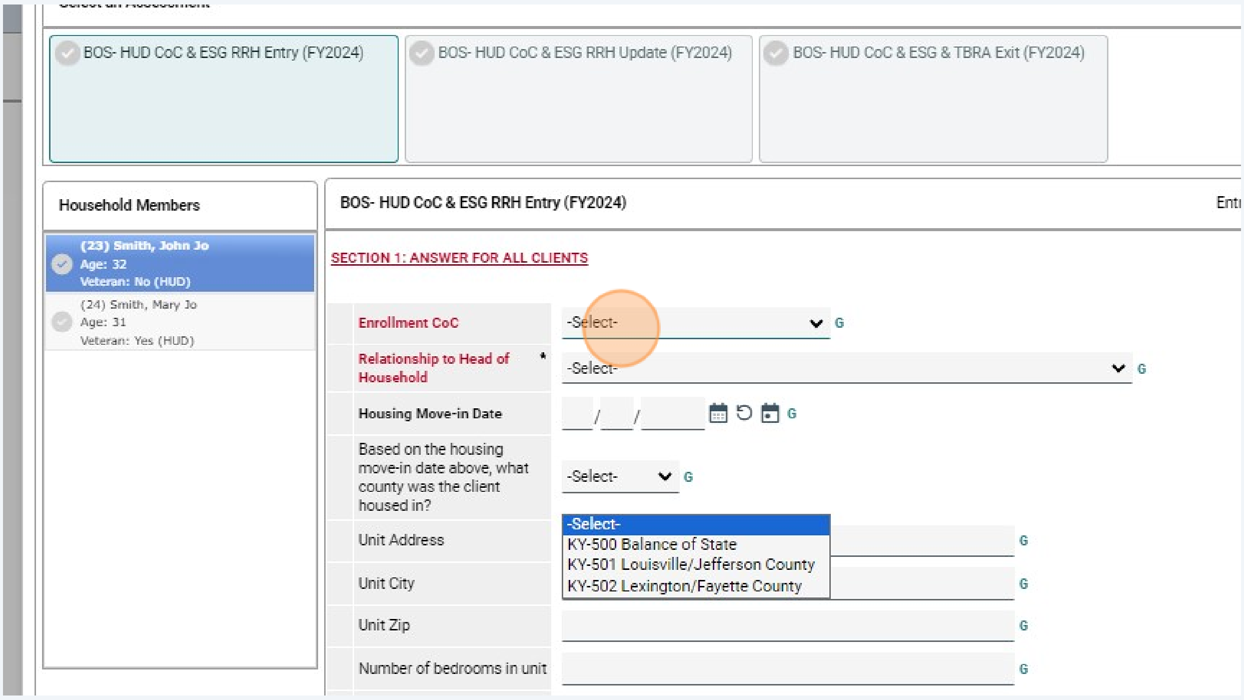
- These fields are important for reporting status at Entry.

Follow the screen from top to bottom.

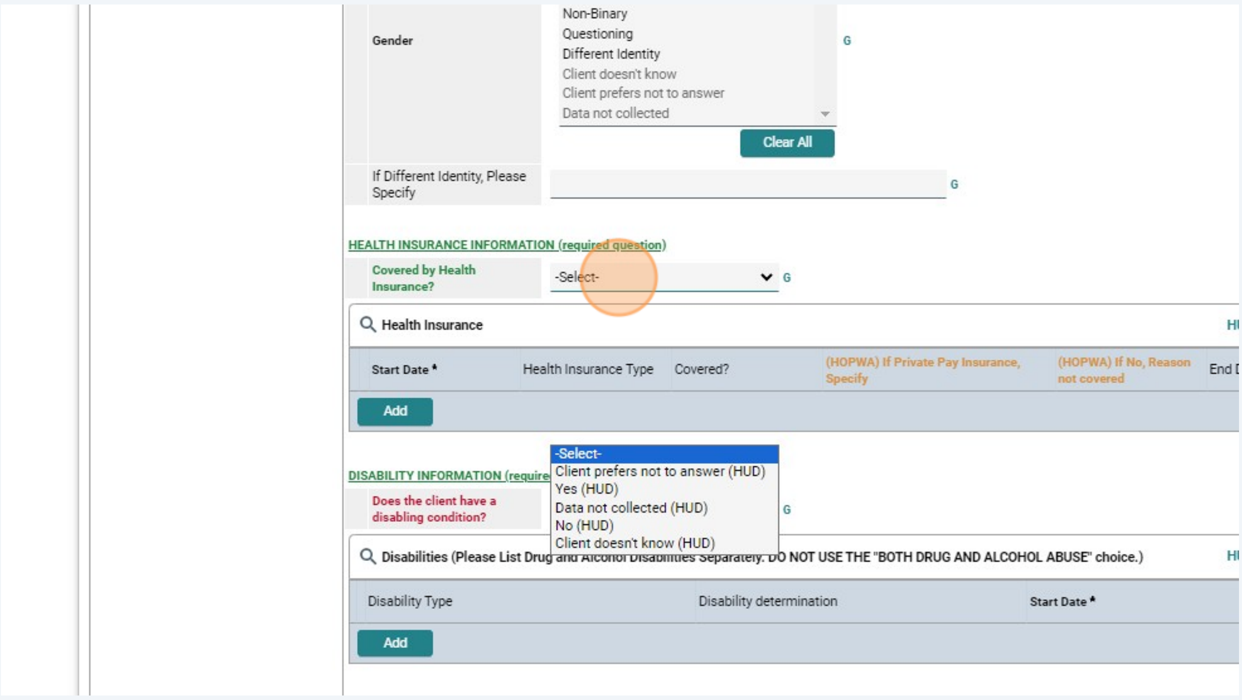
Click "Save", then click on each household member on the left-hand side of the Entry/Exit data pop-up to complete their Entry Assessments.

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

Click "Save & Exit" once completed.

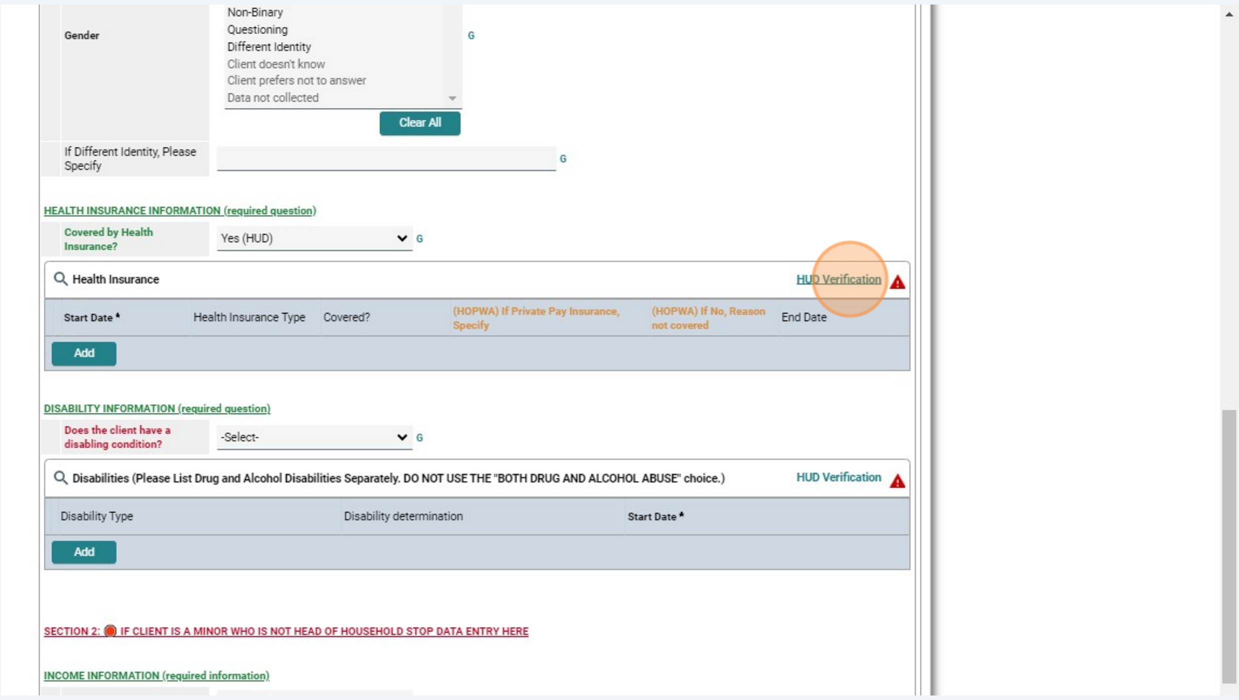


54 HUD **requires** that "Yes" and "No" responses for Monthly Income, Non-Cash Benefits, Health Insurance, and Disabilities be verified during Entry, Updates, and Annual Assessments (Interims), Exits, and Follow-up.



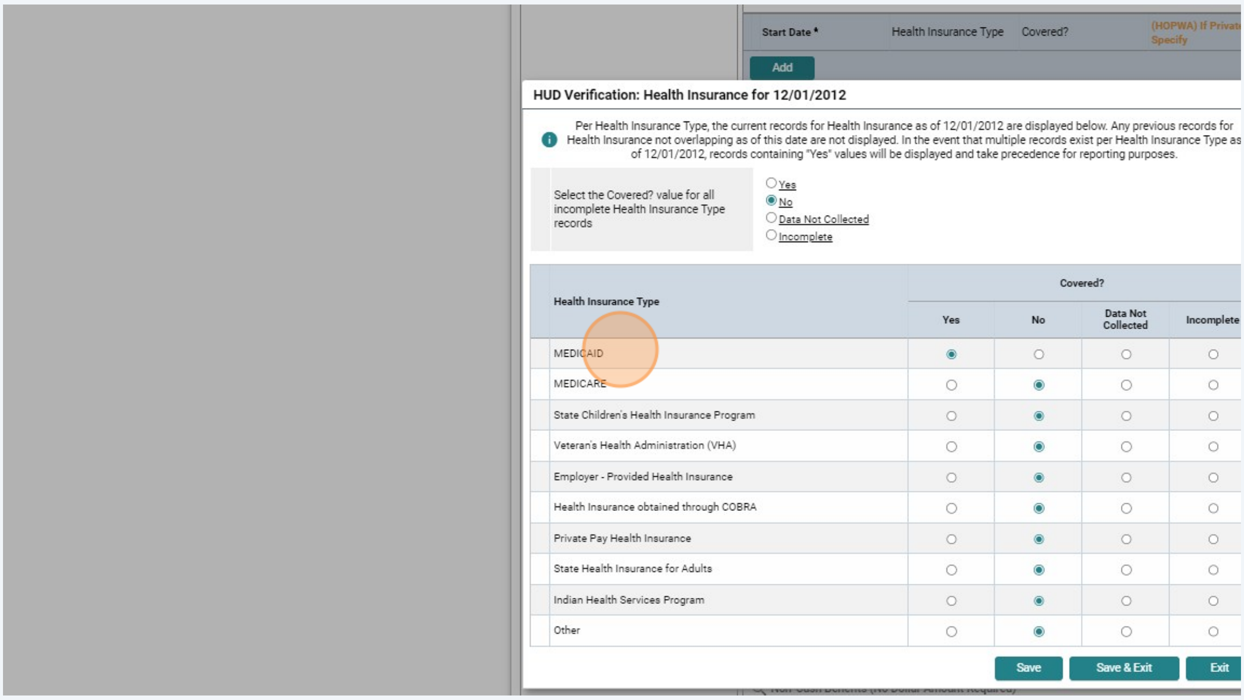
55 These can be updated individually by clicking "Add" and manually entering the information for each sub-assessment OR

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



56 The HUD Verification pop-up will display.

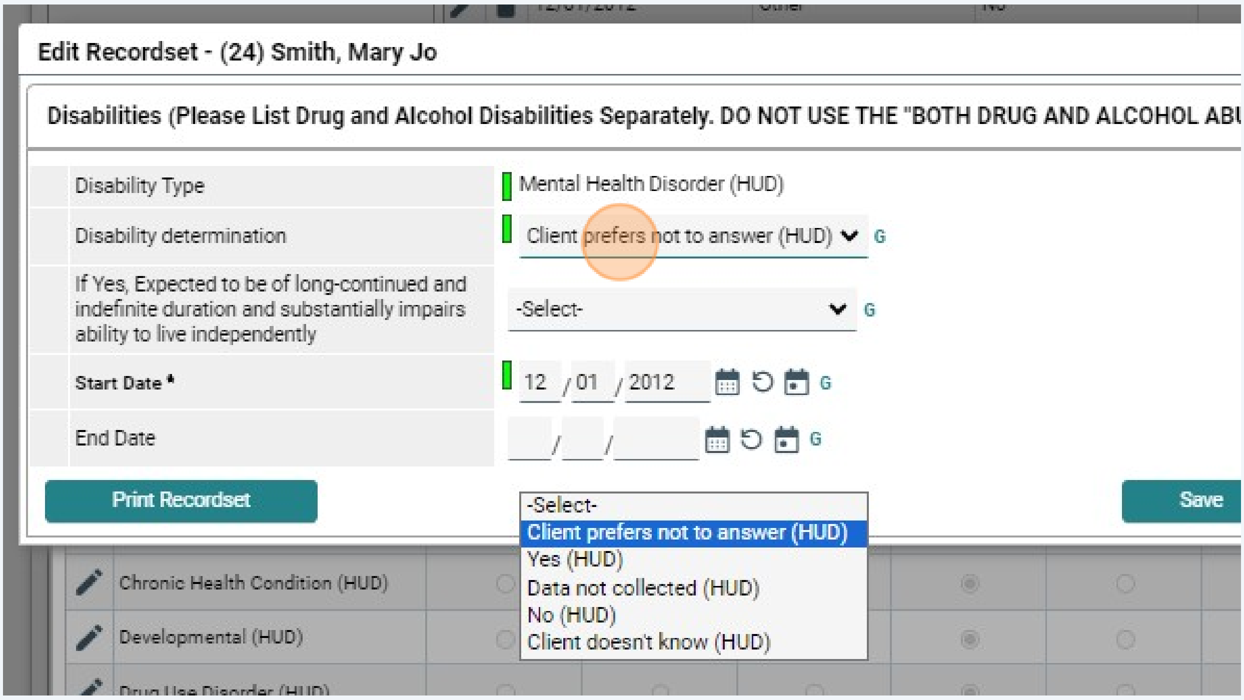
Select "Yes", "No", "Data Not Collected" as appropriate.



Tip!

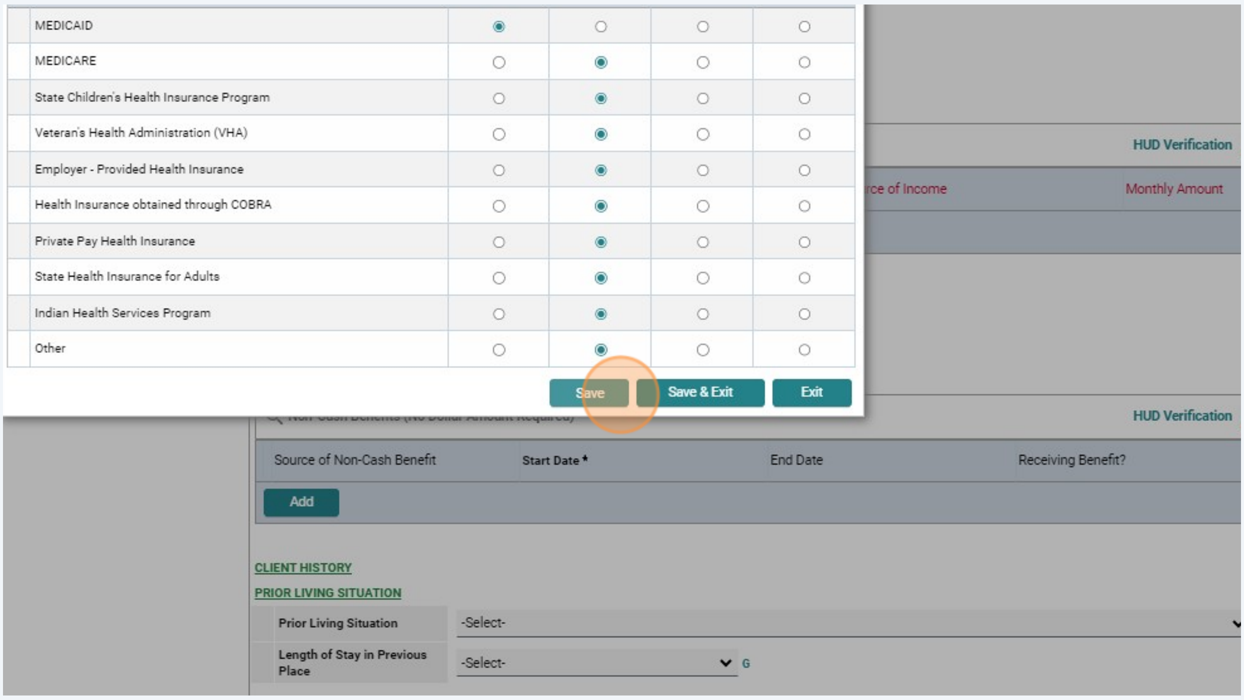
Instead of having to move each radio button individually into either the "Yes" or "No" columns, you can use this menu at the top of the pop-up to move all of the radio buttons to "No". Then you can just select "Yes" where appropriate.

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



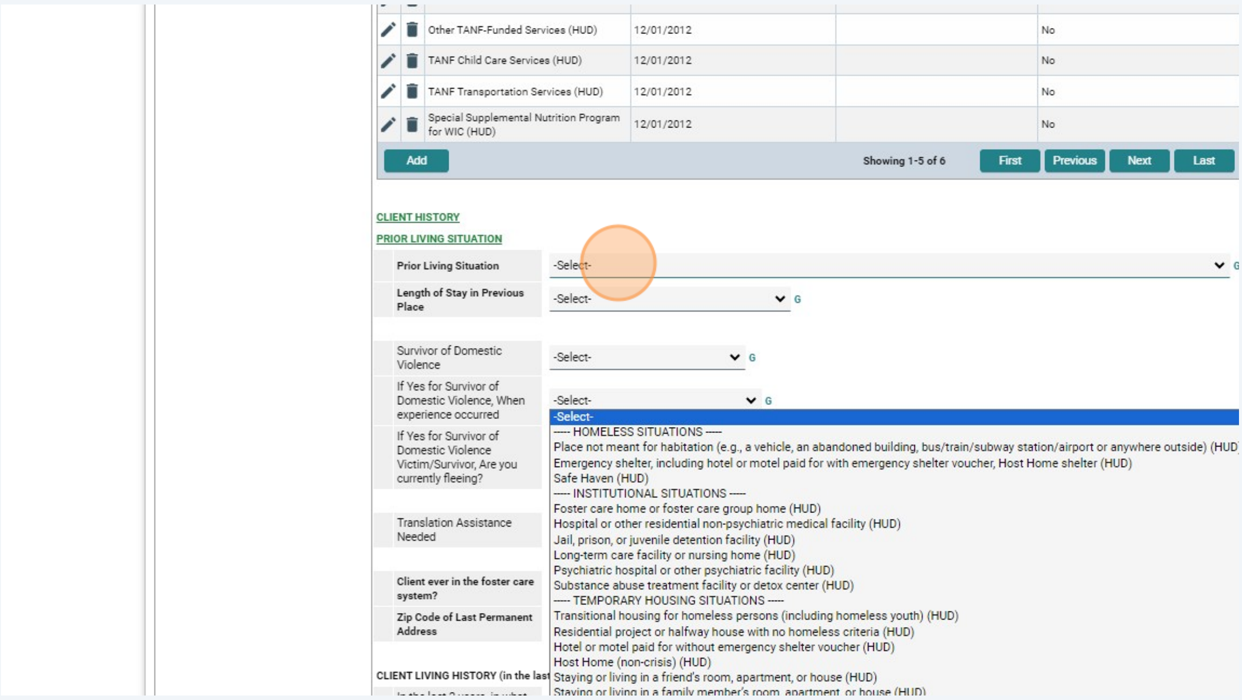
58 Once completed, click "Save & Exit".

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



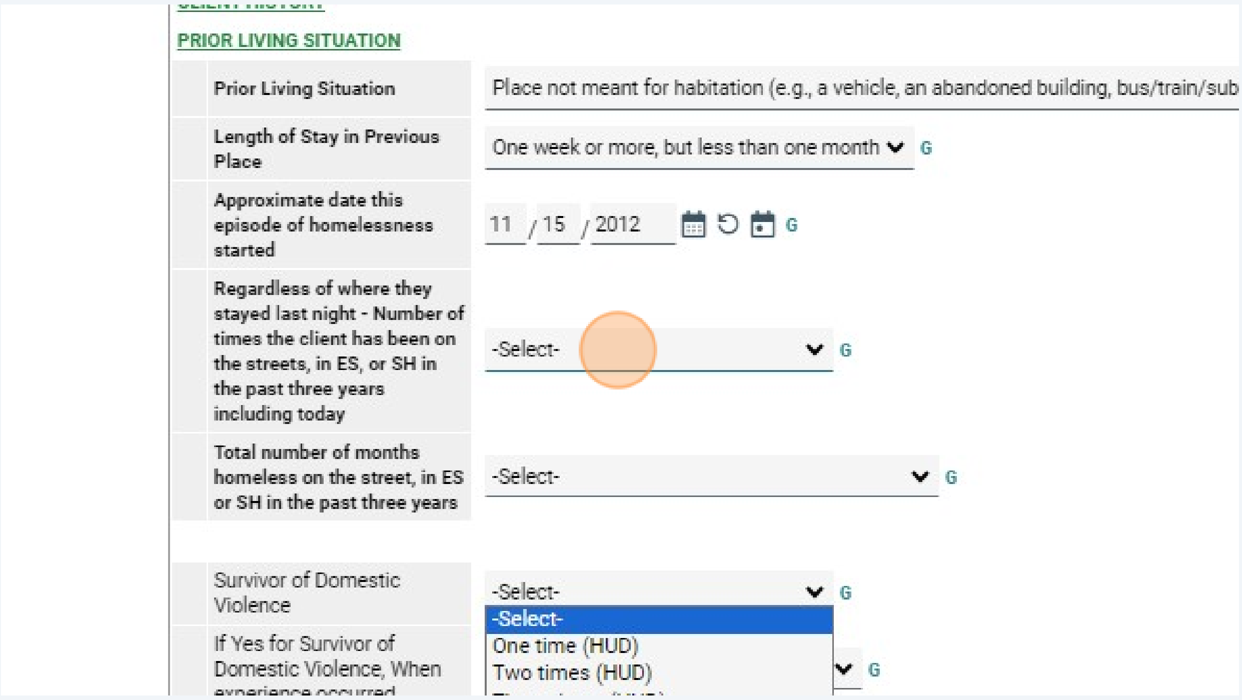
59 Client History Section:

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



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.



⚠ 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 note 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).

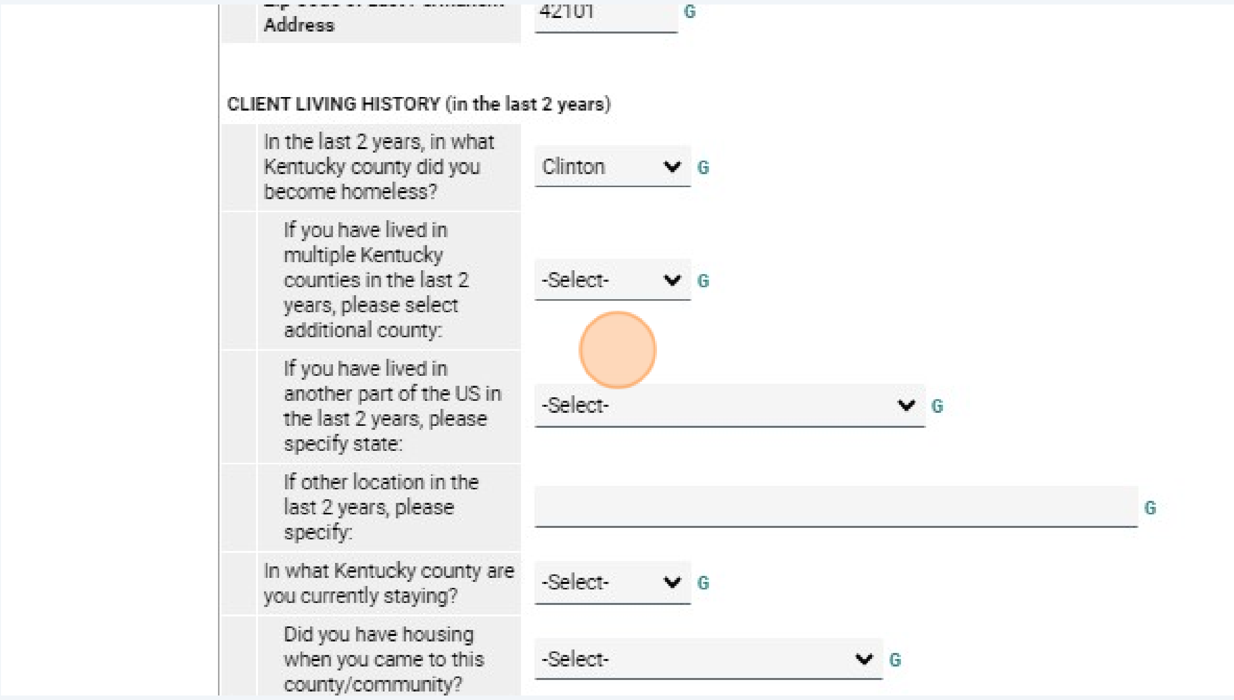
Example*: From the example we used above, the client has 3 episodes of homelessness. 2 weeks in May 2021, which would equal 1 month. Then they were in a shelter for 4 nights, which equals another month. Lastly, their current homeless episode is 16 days, which equals another month. Therefore, the total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

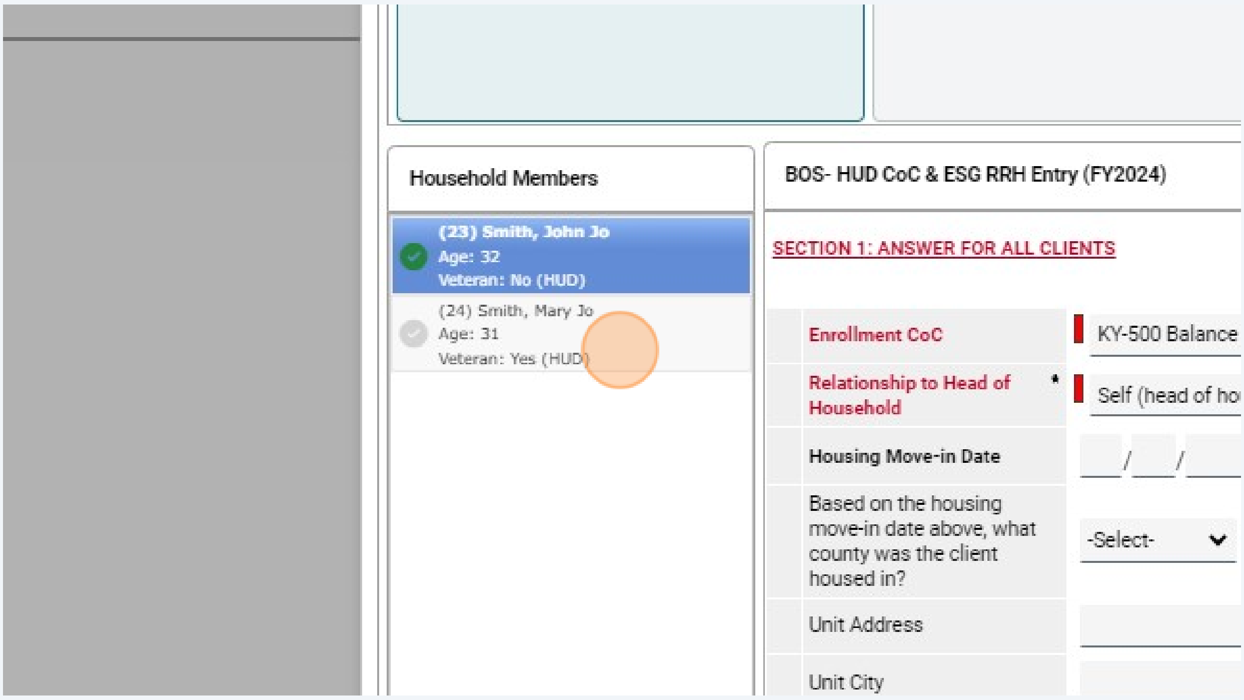
65 When completing these "Client Living History" questions, choose the response that best fits.

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

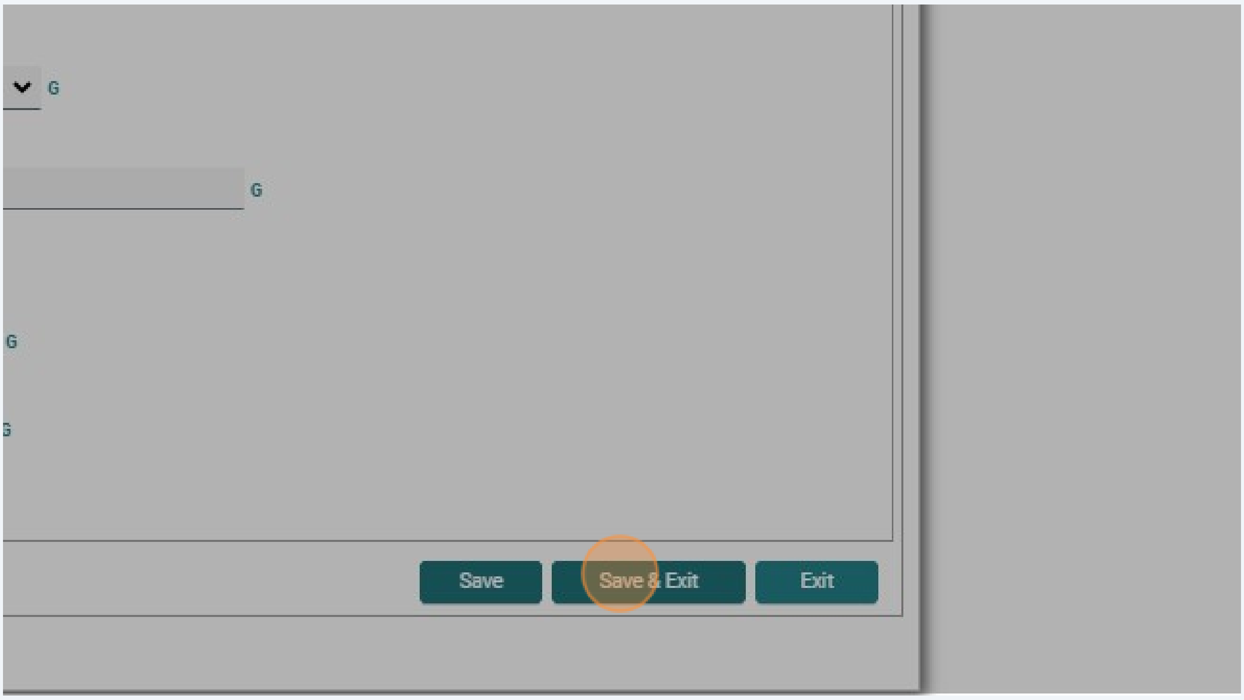
For the text fields, you can put that they are underage, or did not live in Kentucky, or whatever the case may be for the client.



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.



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



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.