



**SACRAMENTO
STEPS FORWARD**

Ending Homelessness. Starting Fresh.

HOMELESS MANAGEMENT INFORMATION SYSTEM (HMIS) *TRAINING MANUAL*

**Sacramento County Continuum of Care
&
Yolo County Continuum of Care**

Revised 12.21.18

For HMIS Support

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Other Useful Resources

Clarity Human Services Help Portal

<http://help.clarityhs.com/>

HMIS Data Standards Manual

<https://www.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual-2017.pdf>

HUD- HMIS News & Announcements

<https://www.hudexchange.info/hmis>

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HMIS: What it is and why we use it

To end homelessness, a community must know the scope of the problem, the characteristics of those who find themselves homeless, and understand what is working in their community and what is not. Solid data enables a community to work confidently towards their goals as they measure outputs, outcomes, and impacts.

A Homeless Management Information System (HMIS) is the information system designated by a local Continuum of Care (CoC) to comply with the requirements of CoC Program interim rule 24 CFR 578. It is a locally-administered data system used to record and analyze client, service and housing data for individuals and families who are experiencing homeless or at risk of homelessness. HMIS is a valuable resource because of its capacity to integrate and unduplicate data across projects in a community. Aggregate HMIS data can be used to understand the size, characteristics, and needs of the homeless population at multiple levels: project, system, local, state, and national. The Annual Homeless Assessment Report (AHAR) is HUD's annual report that provides Congress with detailed data on individuals and households experiencing homelessness across the country each year. This report could not be written if communities were not able to provide HUD with reliable, aggregate data on the clients they serve.

In 2010, the U.S. Interagency Council on Homelessness (USICH) affirmed HMIS as the official method of measuring outcomes in its *Opening Doors: Federal Strategic Plan to Prevent and End Homelessness*. Since then, many of the federal agencies that provide McKinney-Vento Act and other sources of funding for services to specific homeless populations have joined together and are working with HUD to coordinate this effort.

About Our HMIS Software

In Sacramento and Yolo County, the software we are using for HMIS is called Clarity Human Services. Clarity Human Services is a powerful information management system that provides client tracking and case management, service and referral management, and reporting. This secure system allows a number of different agencies and users to continuously enter their clients' data, while being assured that the information is protected. Sacramento and Yolo County's HMIS is overseen by a Working Group that includes representatives from various organizations, advocacy organizations, and providers serving specific populations, such as youth and veterans.

Sacramento Steps Forward (SSF), with support from Bitfocus, Inc., administers all aspects of the HMIS project for Sacramento County.

Who is Bitfocus?

Bitfocus is an IT consultancy, providing custom software development, database management, report development, Technical Assistance (TA), and many other tasks not just exclusive to HMIS.

Clarity Human Services Software

The Clarity Human Services Software is a new database management system developed by Silver Spur Systems LLC, a separate firm from Bitfocus that was established when METSYS was purchased. Both Bitfocus and Silver Spur are owned by Robert Herdzik. Clarity operates as a Cloud Service: a software application that is provided as a live service through a web browser, such as Internet Explorer, Firefox, Safari or Chrome, rather than a product you need to download and install. This means, wherever you or your authorized users are, only the internet and your secure login details

are required to access the Clarity database management system.

Who Benefits?

A. Benefits for men, women, and children who experience homelessness include:

- A decrease in duplicative intakes and assessments
- Streamlined referrals
- Coordinated case management

B. Benefits for agency directors and program managers include:

- Tracking client outcomes
- Coordinating services, internally among agency programs, and externally with other providers
- Preparing financial and programmatic reports for funders, boards, and other stakeholders
- Information for program design decisions

C. Benefits for public policy makers and advocates include:

- Understanding the extent and scope of homelessness
- Unduplicated counts
- Identifying service gaps
- Informing systems design and policy decisions
- Development of a forum for addressing community-wide issues

Ongoing HMIS User Education & Communication

HMIS User Meeting: SSF conducts a monthly HMIS User Meeting (4th Wednesday of each month) to aid in community building and HMIS networking across the CoC. This meeting serves as a place for communication about HMIS/Clarity System and guides in communication, so that SSF can better address the needs of the service providers and front-line staff. Also, SSF's HMIS team provides ongoing training and support for the HMIS users via e-mail and phone. **Remember, you drive the system!**

Agencies Required To Participate In HMIS

The HMIS Federal Partners worked collaboratively to develop the HMIS Data Standards. HUD has worked with program staff of these partners to align the data elements required for each program funding source and determine how and when data is to be collected. The federal partners and programs include:

- U.S. Department of Housing and Urban Development (HUD)
 - Office of Special Needs Assistance Programs (SNAPS)
 - Continuum of Care (CoC) Program
 - Emergency Solutions Grants (ESG) Program
 - Housing Opportunities for Persons with AIDS Program (HOPWA)
 - HUD-Veterans Affairs Supportive Housing (HUD/VASH)
 - Rural Housing Stability Assistance Program (RHSP)
- U.S. Department of Health and Human Services (HHS)
 - Administration for Children and Families (ACYF) – Family and Youth Service Bureau (FYSB)
 - Runaway and Homeless Youth (RHY)
 - Substance Abuse and Mental Health Services Administration (SAMHSA)
 - Projects for Assistance in Transition from Homelessness (PATH)
- U.S. Department of Veteran Affairs (VA)
 - Supportive Services for Veteran Families Program (SSVF)
 - Community Contract Emergency Housing (HCHV/EH)*
 - Community Contract Residential Treatment Program (HCHV/RT)*
 - Domiciliary Care (HCHV/DOM)*
 - VA Community Contract Safe Haven Program (HCHV/SH)*
 - Grant and Per Diem Program (GPD)*

- Compensated Work Therapy Transitional Residence (CWT/TR)*

*Participation in HMIS is not required as part of a funding requirement, except for SSVF. The federal partners recognize that communities record Project Descriptor Data Elements and Universal Data Elements in order to facilitate completion of the HIC and PIT.

In order to gain as comprehensive a picture of homelessness as possible, many other agencies are strongly encouraged to use HMIS, but are not required to do so. These include agencies that provide housing services (e.g., transitional housing, supportive housing, emergency shelters), as well as auxiliary services (e.g., food shelves and outreach programs). The system has the potential of being a powerful tool to track what is happening with individuals who are experiencing homelessness, as well as tracking people who are in danger of losing their housing. So, all agencies that provide services related in one way or another to persons experiencing homelessness are encouraged to use HMIS.

What data is collected?

Universal Data Elements

HMIS Universal Data Elements are elements required to be collected by all projects participating in HMIS, regardless of funding source. The Universal Data Elements establish the baseline data collection requirements for all contributing projects. They are the basis for producing unduplicated estimates of the number of people experiencing homelessness, accessing services from homeless assistance projects, basic demographic characteristics of people experiencing homeless, and patterns of service use, including information on shelter stays and homelessness over time.

The following are the Universal Data Elements:

- | | |
|--|---|
| 3.1 Name | 3.10 Project Entry Date |
| 3.2 Social Security Number | 3.11 Project Exit Date |
| 3.3 Date of Birth | 3.12 Destination |
| 3.4 Race | 3.13 Personal ID |
| 3.5 Ethnicity | 3.14 Household ID |
| 3.6 Gender | 3.15 Relationship to Head of Household |
| 3.7 Veteran Status | 3.16 Client Location |
| 3.8 Disabling Condition | 3.17 Length of Time on Street, in an ES or Safe Haven |
| 3.9 Residence Prior to Project Entry | |

Program Specific Data Elements

Program Specific Data Elements differ from the Universal Data Elements in that no one project must collect every single element in this section. Which data elements are required is dictated by the reporting requirements set forth by each Federal partner for each of their programs. A Partner may require all of the fields or response categories in a data element or may specify which of the fields or response categories are required for their report.

The following Program Specific Data Elements are required by more than one Federal Partner:

- | | |
|--|---|
| 4.1 Housing Status | 4.11 Domestic Violence |
| 4.2 Income and Sources | 4.12 Contact |
| 4.3 Non-Cash Benefits | 4.13 Date of Engagement |
| 4.4 Health Insurance | 4.14 Services Provided |
| 4.5 Physical Disability | 4.15 Financial Assistance Provided |
| 4.6 Developmental Disability | 4.16 Referrals Provided |
| 4.7 Chronic Health Condition | 4.17 Residential Move-In Date |
| 4.8 HIV/AIDS | 4.18 Housing Assessment Disposition |
| 4.9 Mental Health Problem | 4.19 Housing Assessment at Exit |
| 4.10 Substance Abuse | |

For more details on these elements, please refer to the 2017 HMIS Data Standards (link in back).

Privacy & Security

Potential risks of HMIS, like any system for managing data about individuals, include risks to personal privacy. Data privacy and security has been emphasized at every step in developing and implementing Sacramento and Yolo County's HMIS, from choosing software, to designing client notices, and crafting see client information that they have permission to see. Additionally, before being able to use the system, agencies and end-users within agencies must sign User's Agreements indicating that they will uphold rigorous data privacy standards. No information that would enable the federal government to identify particular individuals is sent to HUD via Sacramento and Yolo County's HMIS.

Please review the End-User's agreement included in this manual and signed prior to enrollment to this training.

HMIS Computer Requirements/ Workstation Security

Do not share your Account



Data security goes beyond your computer. You need to ensure that the PPI that is gathered and input into the HMIS needs to be secure at all times.

- Each HMIS user is also required to submit a signed receipt of the HMIS User Agreement prior to system access.
- Passwords are only known by the individuals, which are not even known by the HMIS Administrator Agency or Lead Agency.

Everything in the system is tracked and may be audited. You, as the user, are solely responsible for what happens under your account. Do not share.

Working from Home

- Agency's Privacy Policy should cover a **"work from home"** policy if staff is allowed to work at home. The security setting should match the professional work environment.
- Download of client data on home computers:
 - If completing work at home/approved remote locations, plan for the process, control/restrict downloads, and ensure hard drives are properly cleaned.

Application Security

The following standards must be observed when working with the HMIS system in Clarity.

- Written information specifically pertaining to user access (e.g., username and password) may not be stored or displayed in any publicly accessible location.
- You may not log on to more than one workstation at a time.
- You may not log on to the network at more than one location at a time.

Workstation Security

Access to the HMIS system in Clarity must be secured at all times.

- Computers in public areas used to collect and store HMIS data must be staffed at all times.
- When workstations are not in use and staff is not present, steps should be taken to ensure that the computers and data are secure and not usable by unauthorized individuals.
- After a short period of time, workstations should automatically turn on a password protected screensaver when the workstation is temporarily not in use.
- If staff will be gone for an extended period of time, staff should log off the data entry system and computer.

- Written information pertaining to user access should not be stored or displayed in any publicly accessible location.

HUD Workstation security standards

Lock Workstation	Anytime you leave your workstation unattended, for any amount of time, LOCK YOUR WORKSTATION.
Password-Protected Screensaver	Password-protected screensavers should be set to activate within 5 to 8 minutes when the workstation is not in use.
Log-Off for Extended Periods	<ul style="list-style-type: none"> ➤ If you will be gone from your workstation for 30 minutes or more, log-off Clarity. ➤ If you will be gone from your workstation for 4 hours or more, log-off your computer.

Disposing of Confidential Client Information

Printing and Disposing of Hard Copy Data

- Hard copy data containing Personal Protected Information (PPI) may only be printed from the HMIS system at the physical agency/jurisdiction location(s) and only on printers secured from public access.
- An agency/jurisdiction is responsible for disposing of documents that contain PPI by shredding paper records.

HMIS Technology Equipment Re-Use and Disposal

All technology equipment with hard drives that are used in conjunction with HMIS will be handled according to the following guidelines:

- **Re-Assigned Equipment**
All technology equipment (including computers, printers, copiers, and fax machines) used to access HMIS and which will no longer be used to access HMIS, will have **their hard drives reformatted multiple times.**
- **Non-Functional Equipment**
All technology equipment (including computers, printers, copiers, and fax machines) used to access HMIS and is now non-functional, must have their **hard drives pulled, destroyed, and disposed of in a secure fashion.**
- **Leased Equipment**
When leasing technology equipment, the lease agreement shall include provisions for either the leasing company or the agency to (1) reformat the hard drive multiple times, or (2) destroy the hard drive.

Client Consent & Notification

Important steps to follow when collecting data from clients

- Clients **MUST** be given a notification form that explains HMIS and why their personal information is

being collected.

- Clients **MUST** also be given a consent form, which they must sign and agree to.

Consumer Notice

- “HMIS **Consumer’s Notice**” must be posted and clearly visible to clients at every location that HMIS Intake is being conducted.
 - All outreach workers and case managers who are conducting HMIS intake off-site must carry the “Consumer’s Notice” with them and clearly post at the station where intake is being conducted.
 - **Be sure to review the notice to make sure they understand they key points**

Written Informed Consent

At entry into the program, the Agency will provide a verbal explanation of both the HMIS and the terms of consent. The client will complete, sign, and date the HMIS “Consumers Informed Consent & Release of Information Authorization.” The agency will not divulge confidential information without informed client consent. Clients cannot be denied services that they would otherwise qualify for based on a refusal to share information.



1. **NEVER** add a new client to Clarity until you have reviewed the “Consumer Consent Form”
2. **DO NOT** start entering client data until you have reviewed the intake forms to ensure that all questions have been answered.
3. **RETURN** incomplete intakes to the case manager or data collector for completion before entering them in the system.

List of Agencies Using HMIS System

A current List of Participating Agencies can be found at <https://sacramentostepsforward.org/resources/helpful-materials> under HMIS Client Intake Forms, Sacramento & Yolo County Agencies Participating in HMIS.

Starting on Clarity

Web browsers supported by Clarity

- Microsoft – Internet Explorer 9
- Mozilla – Firefox 10
- Google – Chrome 17
- Apple – Safari 5.1.3

HUD Mandated Password Guidelines

Clarity enforces HUD’s password guidelines to ensure security:

- At least 8 characters in total length
- Contain an upper-case letter (e.g., H)
- Contain a lower-case letter (e.g., h)
- Contain a Number (e.g., 9)
- Contain a Symbol (e.g., \$)
- Passwords **CANNOT** use or include; - the username - the HMIS name - the HMIS vendor’s name (Bitfocus/Clarity)

- Passwords **CANNOT** consist entirely of any word found in the common dictionary, or any of the above, spelled backwards. Your password should not even contain any common word.

Password Expiration

Your password will expire every 90 days. You will receive a reminder e-mail, 10 days prior to expiration. When your password has expired, a prompt window will appear when you try to log-on to Clarity. You will need to choose a new password and enter it in the prompt window. You will not be able to re-use your current password.

Browsers and Passwords



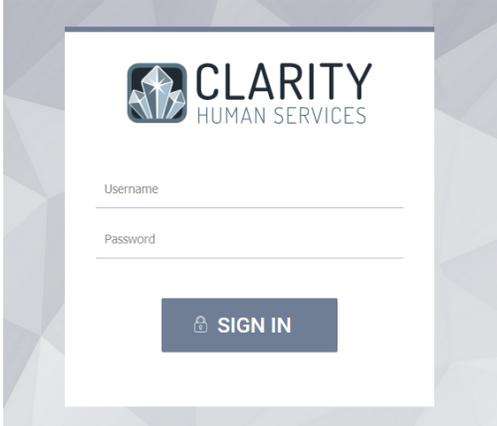
NEVER let your Internet Browser store your login or password. Your browser may give you the option of storing your login or password on “this computer.” **NEVER USE THIS OPTION.** It can give anyone using your workstation access through your browser. So, **NEVER** allow your computer to store your login or password.

HMIS Login Expiration

Your login will expire every 30 days. You will receive a reminder e-mail, 10 days prior to expiration. If you let your log-in expire, it will send you an e-mail letting you know that your login has expired. To reactivate your login, you must send an e-mail to the SSF HMIS staff.

Logging On To Clarity

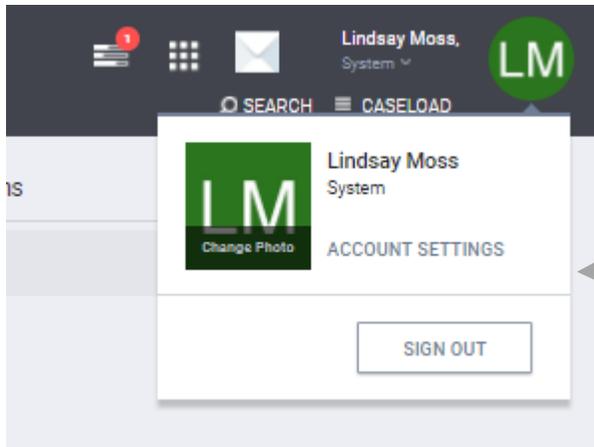
1. Open your web browser (e.g., Internet Explorer, Firefox, Chrome, etc.)
2. **TURN OFF ANY “POP-UP BLOCKERS”!**
3. Go to Website: <https://sac.clarityhs.com/>
4. Add your assigned **username** in the username field.
5. Add your assigned **password** in the password field.
6. Click on: 



If you attempt to log-in FOUR consecutive times with the wrong password, your account will become inactive. To reactivate your account, contact the HMIS Administrator.

Note: The first time you log in, you will be prompted to choose and confirm a new password. Select a new password following the guidelines on the previous page of this manual. When you have entered and confirmed your new password, click on: 

Updating Password and E-mail Address



1. Select your initials

2. Select 'ACCOUNT SETTINGS'

MY INFO

First Name	Lindsay
Last Name	Moss
Email	mynewpassword@my.org
Password	
Confirm Password	
Profile Override	Agency Default
Recent Services	Show
Auto Suggest	Enabled
Enable 2FA	<input type="checkbox"/>
Assessment Due Warning	<input type="checkbox"/>

TO UPDATE E-MAIL

1. Enter new e-mail address

TO UPDATE PASSWORD

1. Enter new password
2. Confirm password

AUTO-SUGGEST

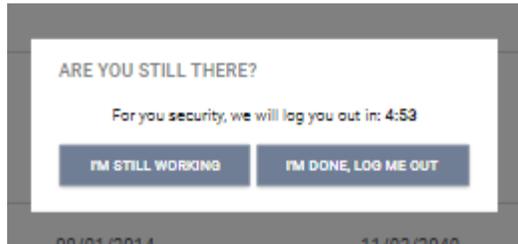
If "Enabled", system will **auto suggest** a password. If you want to pick your own

SAVE CHANGES

**ALWAYS
SAVE CHANGES
TO COMPLETE UPDATE**

Automatic Log off

If you are logged into Clarity, but have been inactive for 30 minutes, you will be automatically logged off after 5 minutes of warning. A message like this will be displayed:

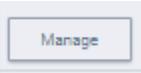


NOTE: If you are automatically logged off by Clarity for inactivity, the last page you accessed will remain visible onscreen. There is potential for a breach in client confidentiality.

Common Clarity Icons

Clarity uses icons to assist you in completing tasks. The table below lists the most common icons you will encounter.

Icon	Name	Description / Actions
	HMIS User's Initials	Edit your profile , change your password , update e-mail address , or sign out
	Launchpad	Located in upper-right hand corner of site, menu for Manage, Reports, Calendar, etc. options
	Client Search	Search for a client It will also bring up the Referrals tab .
	Add New Record	Add a new client into the database.
	Referrals Tab	Access your agency's referrals
	View as Printer-Friendly	Opens a printer-friendly version of the page or document. (See Privacy Standard below.)
	Edit	Edit the record. Often appears on hover.
	Delete	Delete a record. You may delete a service, however you will not be able to delete any enrollment/program history. Program Enrollment/History can only be deleted by the Lead

		Agency's HMIS Staff.
	Manage Household	Add, Join, and Exit Household members from Client sidebar
	Enroll Group Members	Click on ⊕ next to 'Program Group Members' view on Programs screen sidebar to Enroll Program group members.
	Add Status Update	Click on ⊕ next to 'Status Assessments' from within a specific program to Add/Update client's Program status at appropriate interval: Emergency Shelters every 3 months Transition Housing Programs every 6 months Permanent Supportive Housing Projects annually
	Choose Date	Choose a date using the calendar tool.
	Clear Date	Click on Icon to RUN reports
	Report Format	Select the Report format before clicking  Note: Some "Web" reports allow you to drill down to see client list.

Step 1 - Searching For A Client

Reduce Duplications in HMIS

Each agency must do its due diligence to reduce duplicate client records by conducting a thorough search for the client in HMIS before creating a new client record. Maintaining multiple, duplicate records for a single client causes confusion and inaccuracies.

Please keep in mind that if a client was entered by another provider in the HMIS system, It is possible that an alias was used, or the name could be spelled differently.



DO NOT SEARCH ON FULL NAMES - LESS IS MORE!

The fewest letters used in searches will find the most possible matches.
[This helps prevent duplicate clients being entered due to misspellings!](#)

Search for Clients from the Search option (top right-hand corner)



Search Criteria

Before entering a NEW client, you must search to ensure that the client does not already exist in the database. To search for a client in Clarity, complete these **separate** searches in the order listed below:

Example

Your client: Michael Jones, SSN: XXX-XX-1234

Search for your client in this priority (accuracy) order:

Search for	Example
1. SSN last four	1234
2. First name 3 letters + last name 3 letters	mic jon
3. Combination any of above, DOB	mic 1234 10-1-59

If no matches →

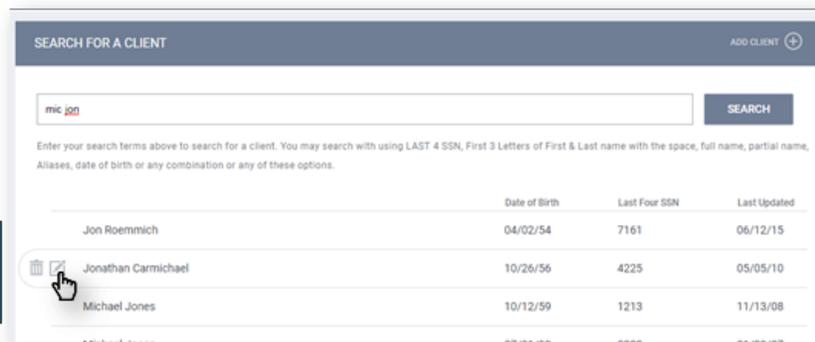
Step 2 - Editing or Adding Clients

Editing a Client found in Search

If you find a match



Hover over client and click 'Edit' option



Update the profile screen with current information. ***Note*** If a client has changed their last name, update the record and include the previous last name on the "Alias" line. In the "Notes" tab, indicate the old last name and the documentation you saw to validate the name change (DL, SSC, etc.)

If a Release of Information (ROI) is Missing

If Clarity cannot find an ROI for the Client, a yellow banner will appear on the profile page to alert you to this.



To add an ROI :

1. Select the security shield in the upper-right hand corner
2. Select 'Add Release of Information' on 'Release of Information' bar
3. You can affirm approval by:
 - Allowing your client to sign electronically
 - Uploading a PDF
 - Indicating proxy consent via a group/family member

Adding a New Client

If you are unable to find the client, you may add a new client from the client search screen, using the add client function.

- Complete ALL fields on the Intake screen with the proper response and click “Add Record” at the bottom of the page when you are finished. All fields REQUIRE complete data.

- If any of the required HUD Universal Data Elements have been left blank, you will be unable to save/create the file. These fields will be highlighted in red for your attention

- Complete the missing fields and click “Add Record” to create the file.

- If you do not have the complete Zip Code of Last Address, you may estimate the zip code, and complete the remainder with 0’s (e.g., 95000 for Sacramento/Yolo).

● Please review your intake to ensure accuracy and completeness. ●

- Add the **Release of Information** from the dialogue on the upper-right hand side of the ‘Create a New Client’ screen (**required!**):

- If the client does not consent, select **Permission: No**
- Otherwise, you can affirm approval by:
 - Allowing your client to sign electronically
 - Uploading a PDF
 - Indicating proxy consent via a group/family member

● Most data elements include a ‘Client doesn’t know’ or ‘Client refused’ response category. These are considered valid responses if the client does not know or the client refuses to respond to the question. It is not the intention of the federal partners that clients be denied assistance if they refuse or are unable to supply the information. However, some information may be required by projects or public or private funders to determine eligibility for housing or services, or to assess needed services.

● The ‘Client doesn’t know’ or ‘Client refused’ responses should not be used to indicate that the case manager or data entry person does not know the client’s response, response category **“Data not collected”** must be used. In such cases, that response category will be treated as missing data for reporting purposes.

Adding a Client Who Does not Consent

If your client does not feel comfortable sharing their identifying information per the Release of Information guidelines, please create an anonymous profile for them. This is a profile which does not contain any information that can specifically identify them as an individual (birthday, SSN, etc.). Demographic information such as race, ethnicity, and often veteran status do not necessarily reveal their identity within the community, so are OK to log.

1. Add your client from >>
2. Set the ‘Release of Information’ Permission to ‘No’

3. Enter the following anonymous info:

SSN	000-00-0000
Quality of SSN	Client Refused
Quality of DOB	Approximate
DOB	Jan 1 actual year of birth +/- 1 year*
Gender, race, ethnicity, veteran status	Actual is OK, so long as it's not a give-away
First name	Your agency's internal ID if you have one, or Consent
Last name	Refused

Step 3 (Households and Families ONLY - SKIP for Individuals)

When adults or unaccompanied minors are seeking services together, they can be entered as a **household** in Clarity. A couple or people seeking services together do not need to be married to be entered in a **household**. For example, an adult, sibling, and grandmother may seek services together. They would be entered as a **household**.

A parent seeking services with his/her children are always entered as a **household**.

These are two key situations for entering clients as a household. **In order to be counted as “Family Members” in the HUD APR, clients must be entered in a household BEFORE enrolling in the Program.**

Types of households

- **Head of Household:** data collection is limited to the head of household. Head of household is the term used in these standards for consistency with other guidance previously developed and does not necessarily indicate the individual’s status in the household. CoCs and HMIS Lead Agencies may elect to further define the head of household for their jurisdiction or may also substitute the concept of “primary client” for the term.
- **Head of Household and Adults:** data must be collected about the head of household and each additional adult in the household. If the household is composed of an unaccompanied child, that child is the head of household. If the household is composed of two or more minors, data must be collected about the minor that has been designated as the head of household.

Where a group of persons apply for services together (as a household or family), information about any children under the age of 18 may be provided by the head of household who is applying for services. The children are not required to be present at the time the head of household applies for services. However, information should not be recorded for children under age 18 if it is indicated that these children will not be entering the project on the same day as the head of household. Information for these children should be recorded when the children join the project. Information on any other adults (18 years of age or older) who are enrolled in the project as part of the household should be obtained directly from that adult. As a general rule, one adult should not provide information for another adult. A project should edit the project entry record of a client who turns 18 after entry, but before exit, to add a response for data elements only relevant to the head of household and other adults in the household in order to improve the reported overall data quality for the project or if required by a funder.

- **All Clients:** data must be collected about each adult and child in a household

Creating Family/Household Groups

1. Verify that each family/household member exists in the HMIS. If they do not exist, complete the above steps for **“Adding a New Client”** to create a profile for each family member.
2. Open the profile for the “Head of Household”, corner, under the header “Household Members”, select “Manage”.



- If you have recently accessed the family member profiles, they will be listed on the right-side menu under the header, "Your recent client searches accessed". If the family member is listed there, hover over the member's name to produce a ⊕ to Add them to the head of households group.

Household Members	
Emily Test	Mother
Babyemily Test	Daughter
Your recent client searches accessed:	
John Test	0000

NOTE: Two Ways to Group

When a listed client has ➡ (Join) as an option instead of ⊕ (Add), that person is already part of an existing family/household group. Rather than adding them to your client's group, you are being given the option of joining your client to the *existing* group (ie, in above image, we can either add Client X to John's existing household, or we can add Jane to Client X's household, where Client X is the active profile and the head of household).

Your recent client searches accessed:	
John Test	0000
Jane Test	4626

- You also have the option of searching for members directly from the Family/Household screen, which you can access from the Client profile > "Manage" Household Members. From the search results, mouse over the client name to produce the "Add" (or "Join") option.

HOUSEHOLD MANAGEMENT				
Search for a Household Member				
test				SEARCH
Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.				
Client	Date of Birth	Last Four SSN	Last Updated	
⊕ Add Lorraine Test	01/28/57	6919	11/28/12	

- Enter the **Member Type** and **Start Date** (date the client became a member of the family/household) and save.

- Complete the same steps for each member until all clients are listed in the Family/Household Members section in the upper-right corner of your screen. (The Head of the Household will be indicated with a star next to their name)

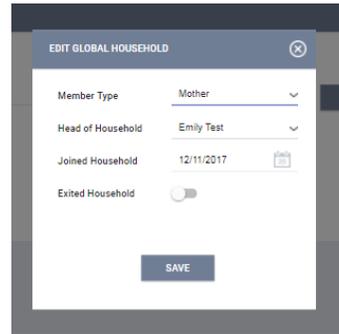
Household Members	
Emily Test	Mother
Babyemily Test	Daughter

If a member leaves the household, clicking

When a Member Leaves the Household

“Edit” from the Household Members list in the Household Management screen. This will allow you to enter an End Date to remove them from the group.

This will remove them from the household and retain a historical record of their time in the group.



Step 4 - Enrolling Clients into Programs

The **Programs** tab in the client file contains the following sections:

Program History: A list of programs your client is either currently enrolled in or has been enrolled in the past.

Programs: Available lists current programs provided by your agency that are available for client enrollment.

Enrolling a Client/Household into a Program

1. Select the down arrow  next to the applicable available program to expand program details.
2. If the client is part of a group, you will be given the **option add group members**. Toggle on those group members you wish to include, if applicable. (Note: If the enrollment is the result of a referral, the toggle will already be on - please keep this toggle position to ensure the referral results are properly tracked.)
3. Select “Enroll”

The screenshot shows the 'PROGRAMS: AVAILABLE' section for 'Emily Test'. The 'Test program for Diversion Program' is selected. It displays 42 active clients, a chart showing 0% Families and 100% Individuals, and a list of service categories. The 'Include group members' toggle for 'Babyemily Test' is turned on. An 'ENROLL' button is visible at the bottom right, with a blue arrow pointing from it to the 'Include group members' toggle.

4. Complete ALL fields in the enrollment page for your client and click “Save & Next”. If any other group members were included in this program, their Enrollment page will automatically come up next until each member has been completed. Continue to click “Save & Next” after completing each group member’s Enrollment. Enrolled group members will be listed in the right side bar under “Program

Group Members”.

NOTE: Program Data Quality

It is critical that ALL fields on the Enrollment are completed in full. Every question asked in this area corresponds directly to the required APR for your program(s).

In the example below, required program fields were left blank illustrating required data elements in order to save the client enrollment. If a required field is left unanswered, the enrollment will not save and message shown below will appear.

▲ Changes have not been saved. Please correct your entry and try again.

Enroll Program for client Emily Test

Project Start Date	12/11/2017 
Agency Conducting VI-SPDAT Assessment	Select ▼
Homeless Outreach Contracts	Select ▼
Name of Case Manager/Housing Specialist	
Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response) ▼
LIVING SITUATION	
Housing Status at Entry	Category 3 - Homeless only under other federal statutes ▼
Reason For Homelessness	Select ▼

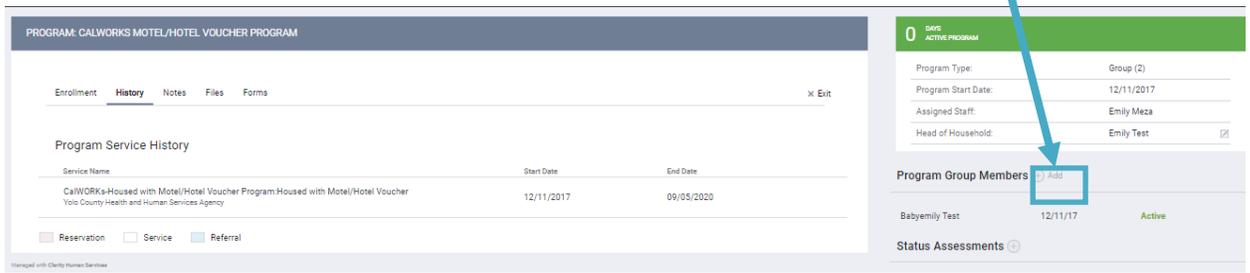
Enrolling a Group Member Mid-program

What if a family member joins the family/individual later during the program stay?

- All additional members must be enrolled through the “Head of the Household”
- To Enroll the additional member to the group:
 1. Select the Head of Household profile
 2. Select the ‘Programs’ tab
 3. Hover over the appropriate program name under ‘Programs History’ and select the Edit icon

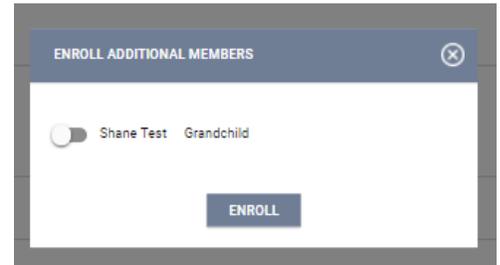


4. Select 'Add' next to 'Program Group Members'



5. You will be prompted to toggle on any additional group/household members on profile. Select any members and then 'Enroll'.

6. **Complete ALL fields in the enrollment page(s)** for your new enrollees and click **'Save & Next'**. As before, if there is more than one group member selected, their Enrollment page will automatically come up next until each member has been completed.

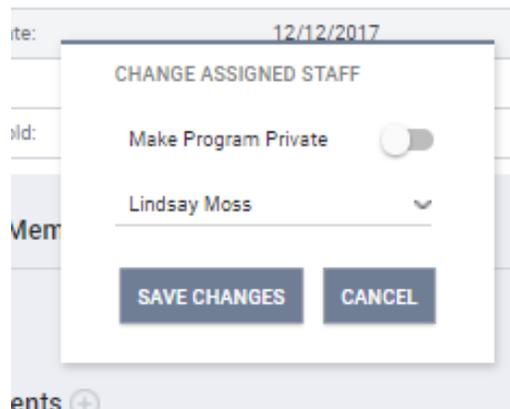


Making a Program Private

In the event a client doesn't want to share their information with other agencies, it's the responsibility of the user to make their program (enrollment information) private.

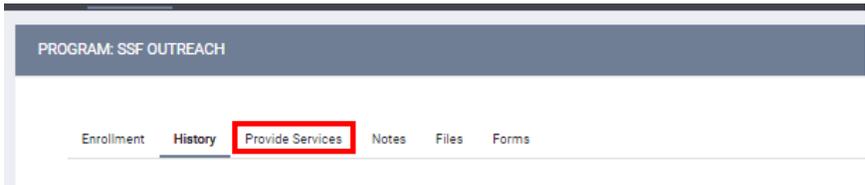
To make the program private:

1. Select the 'Program' tab
2. Hover over the appropriate program name and select the Edit icon 
3. From the program screen, locate the program details box in the upper-right hand corner. Next to 'Assigned Staff', select the Edit icon 
4. Toggle on the "Make Program Private" box and then "Save Changes". You must follow the same steps for all household members



Step 5 - Linking Program Services

When all Enrollments are complete, the “Provide Services” tab will appear for your main client (head of household) within that program



- Select this tab to explore various services offered by the program
- After selecting the service you are providing, enter the **Start** and **End Date**, as well as any expense associated with the service. If applicable, verify that the proper funding source is selected and checkmark any group members who should also receive this service.

- If the service has an “**End Date**” field, it is recommended to **project the End Date into the future** to avoid being disabled prior to client exit. For example, if your program is 90 days and gives extensions, it’s safer and best practice to extend the services *a few additional months* upon program entry. **All services “End Date” MUST be updated and should not exceed client’s actual program exit date. All active services will appear at the bottom of the exit screen.**

The screenshot shows the 'Provide Services' form for 'Alcohol and other Drug Services'. The form includes fields for 'Start Date' (12/12/2017), 'End Date' (12/12/2017), 'Expense Amount' (0.00), and 'Expense Date' (03/01/2017). The 'Funding Source' is set to 'No Funding Source'. There is a 'Service Note' field with formatting options (Bold, Italic, Numbers, Bullets). A 'SUBMIT' button is located at the bottom right.

- Select the ‘Submit’ button to save changes and add any further services from previous steps
- When you have finished, both the program enrollment and associated services should be visible from the Program History:

The screenshot shows the 'Program Service History' table. The table has columns for 'Service Name', 'Start Date', and 'End Date'. The service listed is 'Alcohol and other Drug Services: Referred Sacramento Steps Forward' with a start date of 12/12/2017 and an end date of 12/12/2017. Below the table are legend items for 'Reservation', 'Service', and 'Referral'.

Service Name	Start Date	End Date
Alcohol and other Drug Services: Referred Sacramento Steps Forward	12/12/2017	12/12/2017

Reservation
 Service
 Referral

- If further services need to be added, return to the ‘Programs’ tab and repeat the above steps

The screenshot displays a client profile interface. On the left, there is a vertical navigation menu with several icons and the number '37' at the bottom. The main profile area features a silhouette placeholder for a photo and a box labeled 'UNIQUE IDENTIFIER' with the value '899D83399'. On the right, a sidebar contains three sections: 'Household Members' with a 'Manage' button and the text 'No active members'; 'Active Services' with a list item 'Alcohol and other Drug...' and an edit icon; and 'Active Programs' with the text 'SSF Outreach'.

From the right side menu of the client profile, you can also access the existing program entry

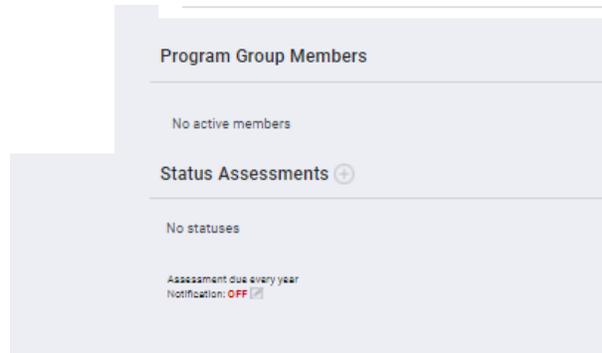
to place services and complete. Under the header, “Active Programs,” locate your program and click “Edit”.

Step 6 - Completing Status / Annual Assessments

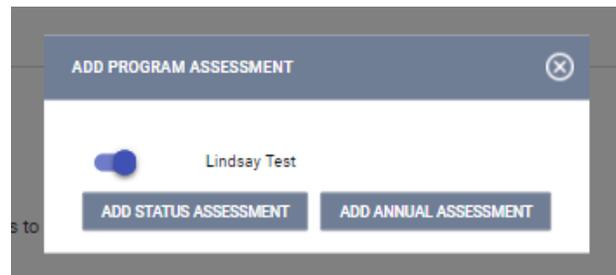
You will be required to complete Annual Assessments at regular intervals for all active clients. Annual Assessments are to be completed anytime from 30 days prior to 30 days after the anniversary of the Head of Household’s project entry date. Status Assessments are required to capture significant changes for the client and can be completed at any time.

1. From the client’s Programs tab, select the ‘Edit’ option for your program. In the next screen, locate the menu containing the header “Status Assessments” on the right-hand side of the screen.

Select  to Add an assessment.

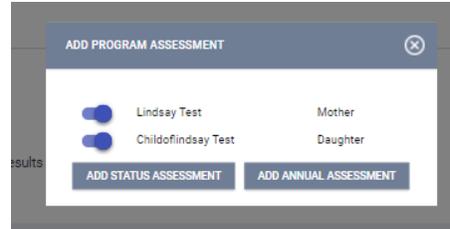


2. Click “Add”. A box will appear asking if you want to complete either a **Status** or **Annual**



Group “Status Assessments”

If this is a **group case**, you will be prompted to select which household members you would like to provide an assessment for. In most cases, this will be all members.

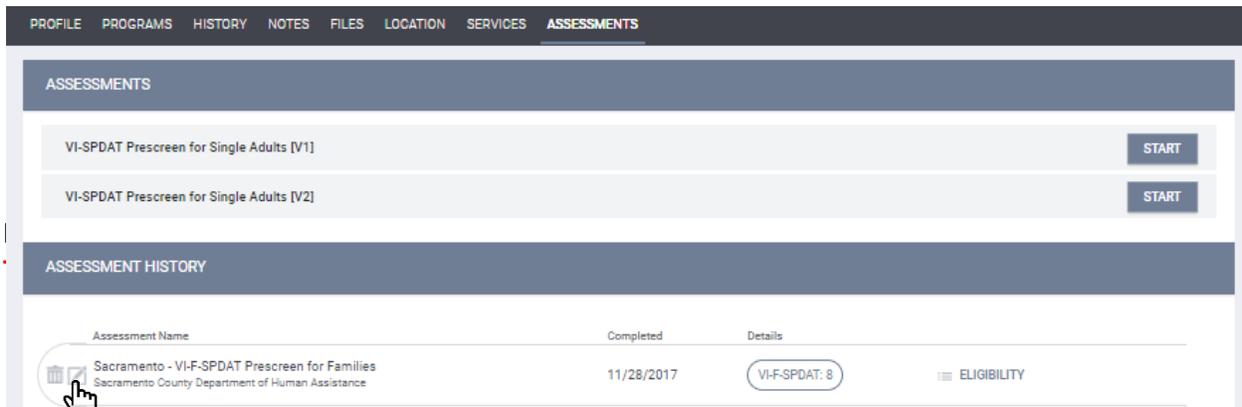


3. Complete all data fields on the **Program Status** screen and be sure to enter the correct date the assessment was conducted. Click **“Save & Next”** when you are finished. **If this is a group case, additional members’ assessment/program status screens will appear until each has been completed.**

Making changes to completed assessments “Status Assessments”

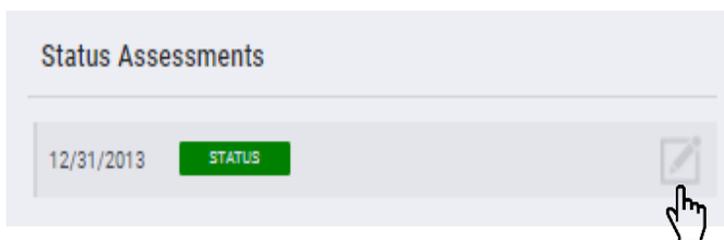
Completed assessments can be viewed and/or edited in two ways:

1. You can access historical assessments from either the Client ‘Assessment’ tab > ‘Assessment History’, then hover to the left of the assessment you’d like to edit and select the edit icon.



- OR -

2. From the Client’s program page, hover to the right of the assessment you’d like to edit under the ‘Status Assessment’ menu

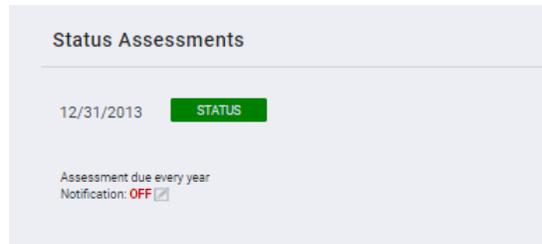


Notifications for Assessment Due Dates

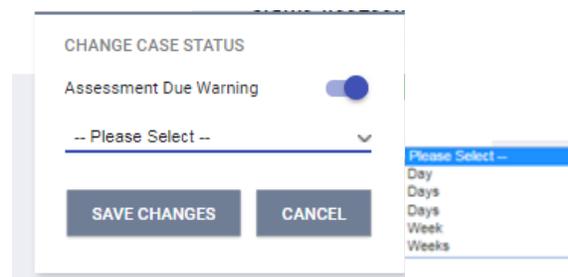
You can receive notification when your clients are due for another program assessment. It will contain your client's searchable Unique Identifier in Clarity.

1. From the Client's program page, hover to the right of the assessment you'd like to edit under the 'Status Assessment' menu

Select the edit  option next to 'Notification:'



2. Toggle on the 'Assessment Due Warning' and select your preferred alert period (how much time before the due date you'd like to receive an email notification)



Step 7 – Rapid Re-Housing Special Requirements

Rapid Re-Housing (RRH) programs have additional steps to complete after they have enrolled a client into their program (enrollment date is the date you've been working with the client to find housing):

1. Conduct a Status Assessment
2. Update Rental Assistance information
3. Add any additional fees paid (deposit, etc.)
4. (Ongoing) Add monthly fees (rent, etc.)

1. Conducting an Assessment

Once a client or a family finds a rental and they have signed a lease to move in, it is required to complete a program **Status Assessment** (for all family members if the program serves families, See Step 6.)

Enter the date they were able to move in.

Project Status Date

__/__/__ 

Is the Program Type a Permanent Housing Program Type?

Yes (Automatically Generated Response)



COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date

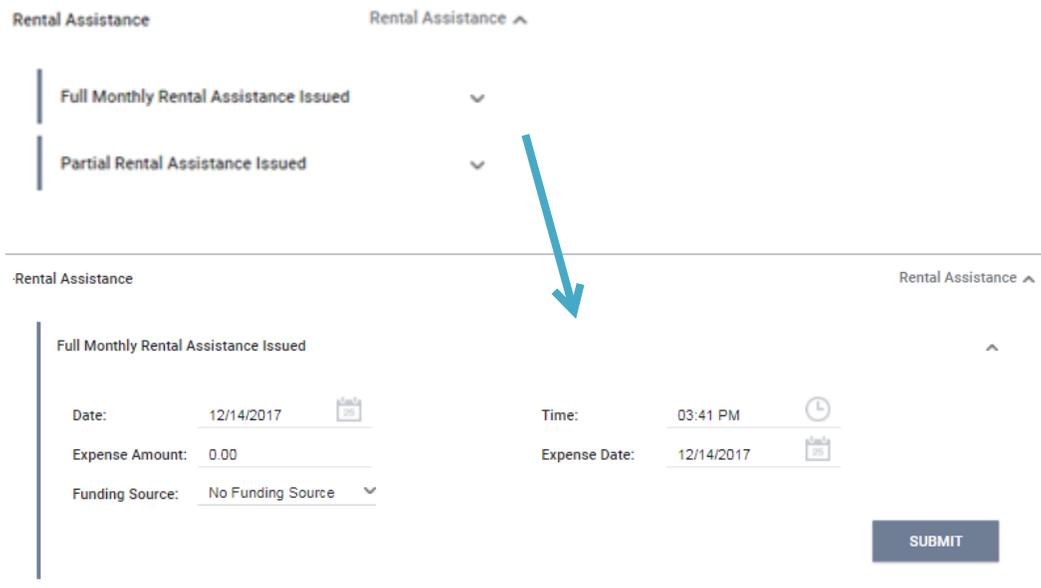
__/__/__ 

2. Update Rental Assistance information

Next, you are required to set their “Rental Assistance” service to show a bed is being paid for by your program (again, set for all family members if the program serves families).

This option can be found under the program’s ‘Provide Services’ tab (See Step 5 for additional information). When you expand the service information by clicking the down arrow, you may have to select from several assistance types. Select the assistance being provided, and enter the date the client moved in, as well as an end date.

For the end date, ALWAYS select an option for further out then your program provides. This will keep the service active until you exit the client from your program. This is also where you will enter the amount of rent your project paid for that first month. After you have entered the information and selected your family members (if applicable), click submit.



The screenshot shows the 'Rental Assistance' section of a form. At the top, there are two dropdown menus for 'Rental Assistance'. The first dropdown is expanded, showing two options: 'Full Monthly Rental Assistance Issued' and 'Partial Rental Assistance Issued'. A blue arrow points to the 'Full Monthly Rental Assistance Issued' option. Below this, the form is expanded to show the details for this option. The details include: Date: 12/14/2017 (with a calendar icon), Time: 03:41 PM (with a clock icon), Expense Amount: 0.00, Expense Date: 12/14/2017 (with a calendar icon), and Funding Source: No Funding Source (with a dropdown arrow). A 'SUBMIT' button is located at the bottom right of the form.

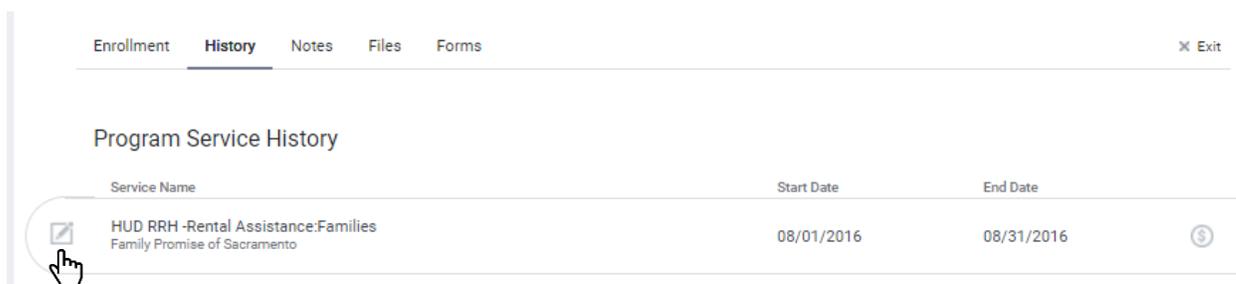
3. Add any additional fees paid

Also from the client's program 'Provide Services' tab, capture any other fees for your program paid (security deposit, application fee, utilities, etc.).

Making Home Habitable Costs	Financial
Moving Costs	Moving Cost Assistance
Other Financial Assistance	Financial
Rental Assistance	Rental Assistance
Security Deposit	Security Deposit
Utility Deposit	Utility Deposit
Utility Payment	Utility Payments

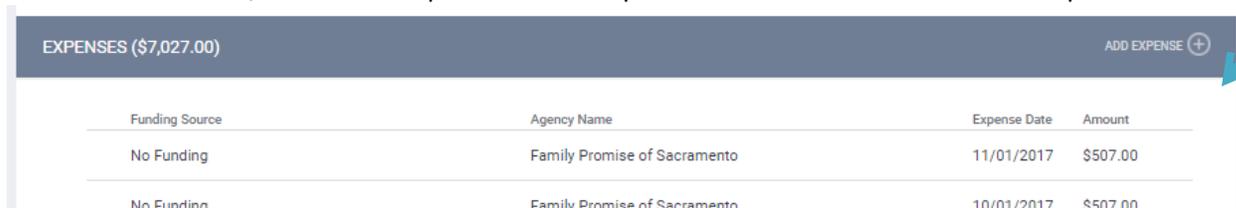
4. (Ongoing) Add monthly fees

Going forward, to add the rent your project pays each month, you will go into the 'History' tab of your client's project, and then edit the existing Rental Assistance Service.



Service Name	Start Date	End Date	
HUD RRH -Rental Assistance:Families Family Promise of Sacramento	08/01/2016	08/31/2016	\$

In the service screen, select 'Add Expense' on the Expenses ribbon and submit the new expense.



Funding Source	Agency Name	Expense Date	Amount
No Funding	Family Promise of Sacramento	11/01/2017	\$507.00
No Funding	Family Promise of Sacramento	10/01/2017	\$507.00

Step 8 - Exiting a Client from a Program and Services

All clients must be properly exited upon completion of the program.

From the **Programs tab** in the client file, find the program you wish to exit your client from and select the Edit  option.

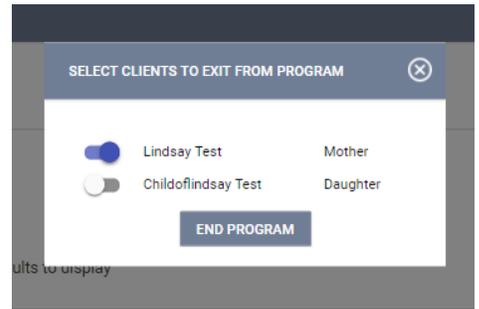
Next, select 'Exit' on the right-hand side of the program menu.



Enrollment	History	Notes	Files	Forms	✕ Exit
------------	----------------	-------	-------	-------	--------

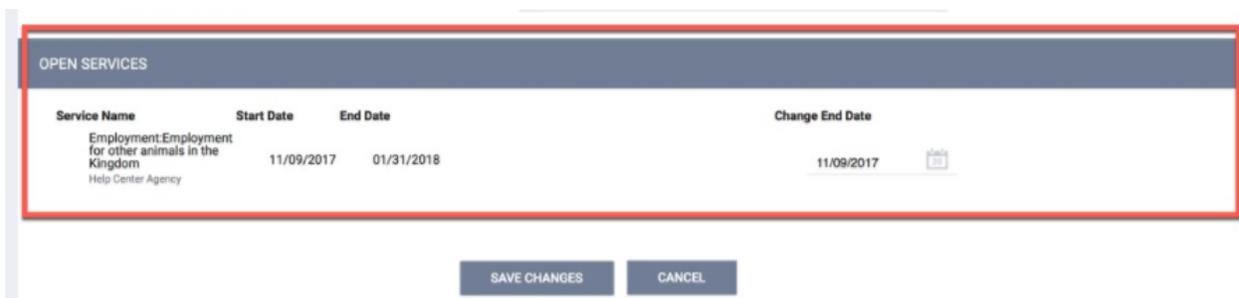
If this is a group case, you will be prompted to select which household members you would like to exit from the program.

Complete **all data** on the 'End Program' screen. Entering full exit data for all clients is extremely important to reporting outcomes for your programs and community.



Step 9 - Ending Open Services

If your client has any services scheduled for after the exit date, you'll see an 'Open Services' section on your exist screen so that you can end them before or on the actual program exit date.



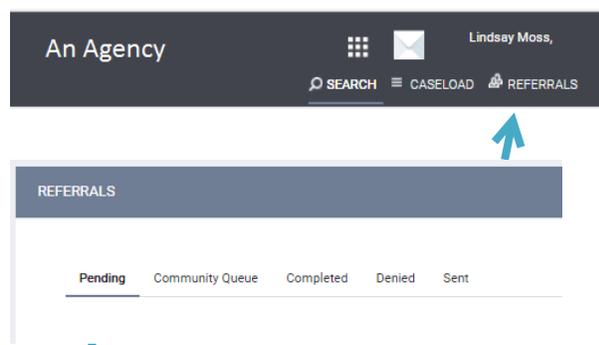
- If you had check marked any group members to also be exited from this program, their End Program page will automatically come up next until each member has been completed. Continue to click 'Save & Next' after completing exit information for each group members.
- **Rapid Re-Housing Projects** will need to put in the correct end date for their Rental Assistance Service. If you chose an exit date further out when you set the service, it should appear for you at the bottom of the screen and will pre-populate with the date prior to the program exit date you entered, signifying the last night the client occupied a bed paid for by your Agency.

Referrals Tab

How to View a Client from the Pending Tab

The referrals tab can be accessed from the Client Search option.

When a referral is sent to your agency and you are the person that has been identified to receive the referrals for a project in the system, you will receive an email notice that includes the Unique Identifier (UI) of the client that is being referred. Paste the UI in the search box in the Pending tab.



To work with that client in the Pending tab of the Referrals section, mouse over the Client Name.

The Edit  option will take you to the actual referral, where you can view the referral and any notes, as well as place the person as “Pending - In Process,” or deny the referral and send it to the Community Queue tab.

Selecting the **client name** will take you to the Profile screen of the client record. This is where you will enroll the client into your project once you have housed them.

Client	Referral Date	Qualified
 A Client Name Program: SHRA Shelter Plus Care - HUD TRA (735) Referred By: Sacramento Steps Forward	07/15/2015	Reassigned

Changing a Referral Status to ‘Pending – In Process’

After opening the referral by selecting the Edit  option, use the drop-down to change the status to “Pending – In Process”, then save changes.

Next, scroll down to the ‘Notes’ section and write a brief note. Select the ‘Send Note’ button to save it. **Enter a note weekly during the process between your intake appointment and when you secure them housing and enroll them into your project.**

VI-SPDAT score 7

Referred by Staff Lindsay Moss

Case Manager

Last Activity 12/15/2017

Status

Private

NOTES

 Reply from Sacramento User @ Sacramento County Dec 4, 2017 at 08:24 AM
This is a test referral

 Reply from Lindsay Moss @ Sacramento County Dec 14, 2017 at 05:40 PM
Client is a good fit for our program. Waiting for a unite to open up.

Note: Please do not use the ‘Referral Connections’ section of the referrals page; it is currently not implemented in the system.

REFERRAL CONNECTIONS

There are no results to display

Denying a Referral

If you need to deny a referral, including because a client is refusing your services, go into the Pending tab in the referral screen and open the referral by selecting the edit option

Use the drop down to **change the status to “Denied,”** which will trigger the additional boxes to appear: Send to Community Queue, Denied Reason, Denied Message, and Private.

A screenshot of a web form for managing a referral. The form includes the following fields: Case Manager (with a 'Select' dropdown), Last Activity (with the date '12/18/2017' and a 'CHECK-IN' button), Status (with a dropdown menu open showing options: Pending, Pending - In Process, Denied, and Expired), and Private (checkbox). The 'Status' dropdown is currently set to 'Pending'.

Set the “Send to Community Queue” box to Yes. All denied referrals must be referred back to the Queue in order for them to be referred to another project.

A screenshot of the referral form with the 'Status' dropdown set to 'Denied'. This triggers the appearance of additional fields: 'Send to Community Queue' (dropdown set to '-- Select --'), 'Denied Reason' (dropdown set to '-- Select --' with options 'Yes' and 'No'), and 'Denied Message' (text area). The 'Private' checkbox is not visible in this view.

Then, at **“Denied Reason,”** select the answer from the drop-down menu that fits best for why your Agency is denying the referral.

Write a note in the “Denied Message” section to provide additional information as to why the client is being denied

A screenshot of the referral form with the 'Status' dropdown set to 'Denied' and the 'Denied Reason' dropdown set to 'Client refused services'. The 'Send to Community Queue' dropdown is set to 'Yes'. The 'Denied Message' text area contains the text 'Client has pet'. The 'Private' checkbox is visible and is currently unchecked.

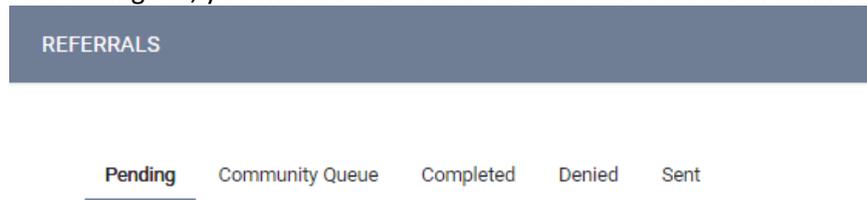
Do Not Check the “Private” box.

Save Changes.

You will also need to upload a denial letter that can be given to the client. Upload this in the “Files” tab of the client’s profile page.

Working With the Other Referral Tabs

In addition to the Pending tab, you will also see four additional tabs that are available to view data.



Community Queue: This tab shows the name of every client in the *full* Community Queue and is managed by SSF in Sacramento County and your regional admins in Yolo . ****You will never need to work in this tab****

Completed: This tab shows the name of every client that was referred to you and that you have accepted into your project by completing an enrollment in the system.

Denied: This tab shows the name of every client that was referred to you and that you have denied in the system.

Sent: This tab shows the names of clients that your Agency referred. We *do not* have direct referral between Agencies at this time and we are only using the Community Queue that is managed by SSF. ****You will never need to work in this tab****

Additional System Features

Adding a Client Photo

Your client may consent to sharing a photo in their Release of Information (ROI). Uploading photos to your client files can provide a quick method of identification.

Within your client’s profile, hover over the image box and select ‘Update Profile Photo’

Adding a Photo

If you have a **web/device camera**, you may take a picture instantly or after 3 seconds from that device.

Otherwise, **take a photo externally** (with a camera or camera phone) and upload the photo to your computer. Select the file from the ‘Upload Photo’ portion and hit the ‘Upload’ button.

Refocusing the Photo

You may wish it re-center of the photo to fit the dimensions of the image box. Use your cursor in the 'Original' box to redefine the focus of the image.

CREATE PROFILE PICTURE



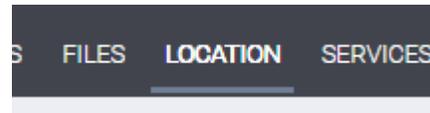
Using your mouse, define the area you wish to use in the original picture by dragging the outline as desired. The image on the right will display a preview of your selection. Click "Save Picture" when you are satisfied with the completed image.

DELETE PHOTO

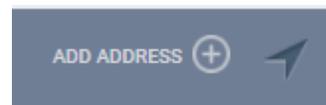
SAVE PICTURE

Adding a Client's Active Address or Contact Information

Select 'Location' on the main menu bar.



Select 'Add Address' in the upper-right hand corner



(You can select the pointer icon to allow your device/browser to find your current location – but it will not be added as a client location)

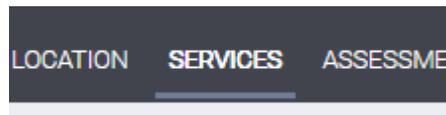
Add the details for your client's location type in the next screen and save.

Your client's location will now appear on the map.

General Service Transactions

A general service transaction is placed through the "Services" tab. It records the provision of a **service to a client that is not part of a Program**.

Click on the "Services" tab in the client file.



Select the service you wish to provide outside the context of a program.

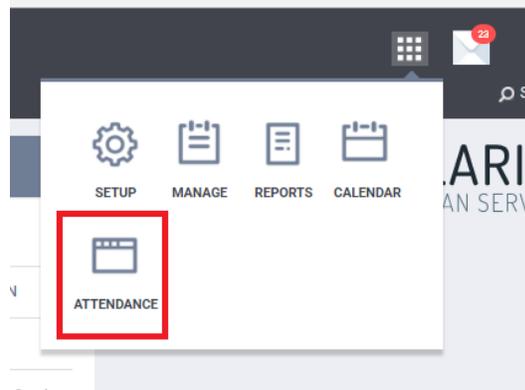
(To appear as an option, the service must be eligible to be provided outside of a program)

Important: If your client is part of a family/household group, you have the option to check family members who should also receive this service placement. Checking any family members listed will place an identical service placement in that member's HMIS history.

NOTE: All service placements **MUST have a valid end date**. Failure to enter an end date will produce a one day service placement, which may not be accurate for all of your serviceplacements. It is **"Highly Recommended"** that you project the service end date way out into the future.

Daily Attendance Transactions

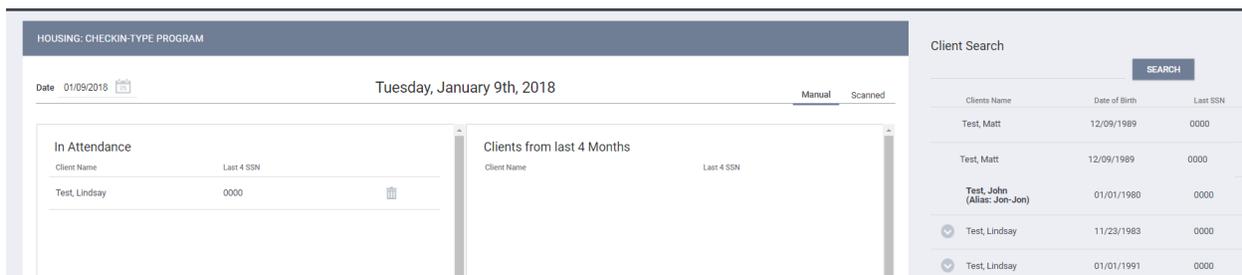
If your agency provides services on a day-by-day basis, allowing a large number of clients to be checked in for services very quickly, you may find an 'Attendance' option from the main menu.



If you'd like to mark a client's daily attendance, **select this option and then the appropriate service name**

The Attendance Screen shows you who has already been marked in attendance (you can be marked as in attendance after being enrolled into the service). You will automatically be brought to the current date, but you can use the date picker in the upper-left hand corner to switch dates

Date 01/09/2018 
Add an attendee from a list of recent attendees from the last four months or from the side panel / client search.



To remove an attendee, select the Trash Can icon to the right of the attendee.

The Service Attendance screen is divided into 3 sections:

- The 'In Attendance' box is located on the left side of the screen. This is where you will place the clients who received the service on the given date.
- To the right of this box is the list of clients who have **received this service at any point in time during the past 4 months.**

- On the far right side of the screen is the **client search box**; here you can enter a client name or part of the name for clients who have not received the service within the past 4 months. You can also easily manage household attendance here, as well.

NOTE: Clients **who are not found** in your search results do not exist in HMIS. Please follow the steps for **“Adding a Client”** to create a file for your client prior to attempting to place them into attendance for services.

You can also manage attendance from within a client’s service history, under the ‘Attendance’ box within the service screen.

Adding a Cost to Services

In some cases, when you add a service you will be prompted to enter a cost at the time of placement.

When adding a service

The service may have a default value associated with it, such as in the case of the example of the ‘Bus Pass’ below. The service may be configured to have this default value and/or it may be fixed, but in other cases you may be able to alter the expense amount in the ‘Expense Amount’ field:

The screenshot shows a form titled 'Transportation' with a sub-section for 'Bus Pass'. The form contains the following fields:

- Start Date:** 01/09/2018 (with a calendar icon)
- End Date:** 01/09/2018 (with a calendar icon)
- Expense Amount:** 5.00
- Expense Date:** 01/09/2018 (with a calendar icon)
- Funding Source:** No Funding Source (with a dropdown arrow)

Adding detail to an expense or adding additional expenses

If you would like to add more detail to the expense, such as check number or funding source, you can access the service from the client’s ‘Active Services’ or ‘Recent Services’ sidebar, or from the ‘History’ tab.

The image contains two screenshots. The left screenshot shows a sidebar with the following sections:

- Household Members:** Lindsay Test
- Active Services:**
 - Housing:Checkin-Type Program
 - Transportation:Bus Pass (highlighted with a red line)
- Recent Services:**
 - Transportation:Bus Pass (highlighted with a red line)
 - Clothing:Provided

The right screenshot shows the 'HISTORY' tab of a client's profile. It displays a list of services with the following details:

- Advanced Search Options** (with a 'View' link)
- Service Name:** Referral: Admin Only Test Program 1 (Admin Only Test Agency referral to Admin Only Te)
- Service Name:** Housing:Checkin-Type Program (Admin Only Test Agency)
- Service Name:** Transportation:Bus Pass (Admin Only Test Agency) (highlighted with a red line)

Locate the expense bar and select (edit) an existing expense or add a new expense

EXPENSES (\$5.00)			
Funding Source	Agency Name	Expense Date	Amount
No Funding	Admin Only Test Agency	01/09/2018	\$5.00



Add / update the appropriate information for the expense

MODIFY EXPENSE ✕

Funding: No Funding ▼

Amount: \$

Expense Date: 📅

Check Number:

Vendor:

Notes:

SAVE

Program Tab Overview

After selecting a client’s enrollment into a particular program, you will have a number of options to view the service and enrollment history, as well as provide services for your client within that program.

PROGRAM: ADMIN ONLY TEST PROGRAM 1

- Enrollment
- History
- Provide Services
- Assessments
- Goals
- Notes
- Files
- Chart
- Forms
- ✕ Exit

Program Service History

Service Name

Referral: Admin Only Test Program 1
Admin Only Test Agency referral to Admin Only Test Agency

- Reservation
- Service
- Referral

- Enrollment**
Opens the
- History**
Shows the history of the
- Provide Services**
Allows placement
- Files**
Allows you to add files

enrollment screen completed upon entry

Forms
Allows you to add forms that can only be seen by your Agency*

client's services associated with this specific program

Notes
Allows you to enter case notes that can only be seen by your Agency

of services associated with the program

Exit
Opens the exit documentation for when the client leaves your program.

that can only be seen by your Agency

* Do NOT use these options to upload files for Coordinated Entry

Program Status Box

Current status, type, state date

List of current group members, with option to add new members

List of current group members with option to add new members or edit existing.

9 DAYS ACTIVE PROGRAM

Program Type:	Group (2)
Program Start Date:	12/31/2017
Assigned Staff:	Lindsay Moss <input checked="" type="checkbox"/>
Head of Household:	Lindsay Daughter <input checked="" type="checkbox"/>

Program Group Members

Lindsay Mom	12/15/17	Active
-------------	----------	--------

Status Assessments (+)

No statuses

Assessment due every month
Notification: OFF

History Screen Overview

The History screen is a color-code view into your client's **Services, Programs, Assessments, and Referrals**. It also provides you an easy option to find and select one of these activities.

Advanced Search Options View

Service Name	Start Date	End Date	
Referral: Admin Only Test Program 1 Admin Only Test Agency referral to Admin Only Test Agency	01/09/2018	12/31/2017	
Housing:Checkin-Type Program Admin Only Test Agency	01/09/2018	01/10/2018	
Transportation:Bus Pass Admin Only Test Agency	01/09/2018	01/09/2018	
Transportation:Bus Pass Admin Only Test Agency	01/09/2018	01/09/2018	
Admin Only Test Program 1 Admin Only Test Agency	12/31/2017	Active	
Clothing:Provided Sacramento Steps Forward	12/07/2017	12/07/2017	

Service **transactions with attached expenses** are marked with a \$ icon at the right of the listing. Hover your mouse over the icon, and additional financial details are displayed. This includes the total expense amount, and the funding source the expense was applied to.

If your client has a very large history spanning multiple pages of results, the **“Show advanced search options”** feature provides an excellent interface to narrow down your results.

By selecting the ‘Edit’ option to the left of a service name, you will be able to add service notes, adjust dates, add additional expenses, and add household members from within the program management screens.

Adding Case Notes

To add a case note, click on the **“Notes”** tab in the client file. In the upper right corner, click on **“Add Note”**

Uploading Files

The file section allows you to upload important documentation to your client’s account.

NOTE: Files v. Forms

A **form** is typically something offered by an agency or HMIS that can be signed electronically, such as the Release of Information. We have an electronic version on file that is built out for your client to sign easily. It is a standardized form required by an agency.

With Forms, you will be prompted to identify a specific document name, such as ‘Revocation of Consent’.

A **file** is something non-standard and non-templated such as a copy of a license.

With Files, you will be prompted to identify a category and name for this file type.

Most of the time, you will be uploading files when keeping track of your client’s documents, the exception being HMIS-specific agreements.

1. Select the ‘Files’ tab from the Programs screen
2. **Select a category and name** from the drop down menus that closest resembles the type of file you are uploading.
3. Upload your file and ‘Save Changes’

UPLOAD A FILE

Category: Achievements/Awards

Name: Completions of AOD Program

File: Select File

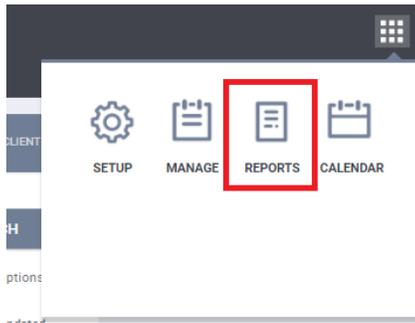
[Trouble attaching files? Switch to the Basic Uploader](#)

ADD RECORD CANCEL

How to Work With the Report Library

Running a Report

To run (or schedule) a report, select  > ‘Reports’



This will bring you to the Report main screen, which is divided into several sections according to report type, with Show/Hide features for easy organization.

Select the down arrow next to the reporting category to expand your options.

Some reports give you the option to view 'More Info'

To run a report, select 'Run', then enter the parameters for the report, such as services, programs, or funding types.

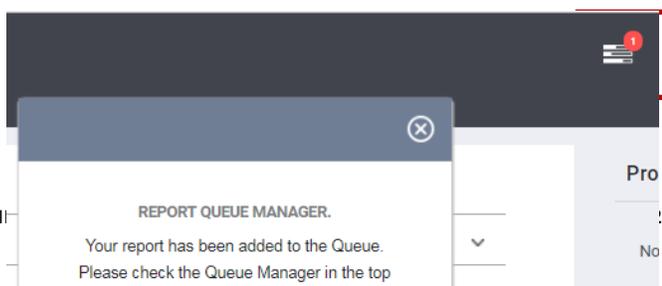
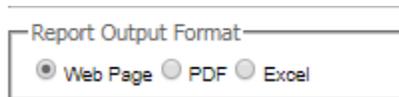
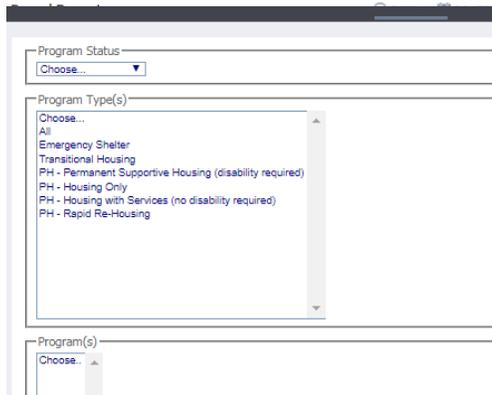
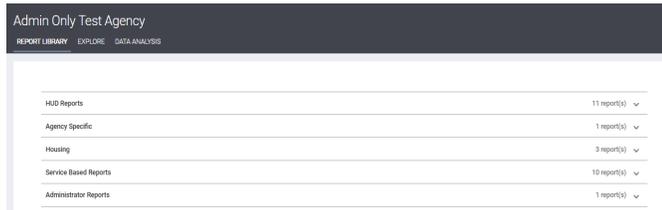
Because each report is different, some of the parameter options will vary depending on the report.

You will be prompted to select an output format.

- **Web Page:** A Web Page is a functional format that allows you to drill down on data elements to inspect the underlying data supporting it.
- **PDF:** The PDF is a good option for official reports, grants, etc.
- **Excel file:** If you download the excel file, you can use excel to manipulate and organize the data (e.g., Sort/Check for duplicates, etc.)

Once you're ready to run your final report, select the 'OK' button.

You'll be notified that the report is being HOMELESS MANAGEMENT INFORMATION SYSTEM (HMIS) TRAI



queued, and you'll also be alerted when it's ready in the queue manager in the top right-hand corner of your screen.

Click on the queue manager to

Scheduling a Report

Reports can be run immediately, or they can be scheduled to run at specified times. To schedule a report, select the 'Schedule' link instead of the 'Run' link.

Administrator Reports	25 report(s) ▼
Program Based Reports	25 report(s) ▲
[GNRL-106] Program Roster	⊙ RUN SCHEDULE MORE INFO ▼
[EXPS-102] Program Service Expense Review	⊙ RUN SCHEDULE MORE INFO ▼
[OUTS-101] Program Outcome Measures	⊙ RUN SCHEDULE MORE INFO ▼

Select the date you'd like to have the report automatically run in the 'Scheduled Process Date', Include the start and end date period for your report to reference, and save.

REPORT LIBRARY EXPLORE DATA ANALYSIS **PREVIEW**

Schedule Report

Scheduled Process Date

01/13/2018

January 2018

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Today Done

Emergency Shelter



**SACRAMENTO
STEPS FORWARD**

Ending Homelessness. Starting Fresh.

**HOMELESS MANAGEMENT INFORMATION SYSTEM
(HMIS)
*TRAINING MANUAL: Appendix Documents***

**Sacramento County Continuum of Care
&
Yolo County Continuum of Care**



HMIS CONSUMER NOTICE

Sacramento CoC Homeless Management Information System

Approved 11.14.2018

This Agency participates in the Sacramento Continuum of Care, Homeless Management Information System (HMIS), which collects basic information about consumers receiving services from this Agency. This data is collected in order to get a more accurate count of individuals and families who are homeless, and to identify the need for different services.

We only collect information that we consider to be appropriate. The collection and use of all personal information is guided by strict standards of confidentiality. A copy of our Privacy Notice Statement describing our privacy practice is available to all consumers upon request. Agencies participating in HMIS share information with local agencies partnered in HMIS unless they serve a protected population, in compliance with applicable federal and state law. The list of HMIS Partner Agencies is available to consumers at intake upon request. Sharing information among agencies allows those agencies to work in a cooperative manner to provide you with better services.

You have the right to refuse certain data answers to be entered into the HMIS database. As such, we request every consumer whom we serve to sign a “Consumers Informed Consent & Release of Information Authorization”. Although you will receive services if you refuse to provide data answers, your eligibility to receive some specialized services may be impacted by not participating in HMIS.

You do have the ability to share your personal information with other area agencies that participate in the network by completing a “Consumers Informed Consent & Release of Information Authorization” form. This will allow those agencies to work in a cooperative manner to provide you with efficient and effective services.



HMIS CONSUMER NOTICE

Sacramento CoC Homeless Management Information System

Approved 11.14.2018

This Agency receives funding from U.S. Department of Housing and Urban Development to provide services for homeless and near homeless individuals and their families. A requirement of this funding is that the Agency participates in the Sacramento Continuum of Care, Homeless Management Information System (HMIS), which collects basic information about consumers receiving services from this Agency. This requirement was enacted in order to get a more accurate count of individuals and families who are homeless, and to identify the need for different services.

We only collect information that we consider to be appropriate. The collection and use of all personal information is guided by strict standards of confidentiality. A copy of our Privacy Notice Statement describing our privacy practice is available to all consumers upon request. Agencies participating in HMIS share information with local agencies partnered in HMIS unless they serve a protected population, in compliance with applicable federal and state law. The list of HMIS Partner Agencies is available to consumers at intake upon request. Sharing information among agencies allows those agencies to work in a cooperative manner to provide you with better services.

You have the right to refuse certain data answers to be entered into the HMIS database. As such, we request every consumer whom we serve to sign a “Consumers Informed Consent & Release of Information Authorization”. Although you will receive services if you refuse to provide data answers, your eligibility to receive some specialized services may be impacted by not participating in HMIS.

You do have the ability to share your personal information with other area agencies that participate in the network by completing a “Consumers Informed Consent & Release of Information Authorization” form. This will allow those agencies to work in a cooperative manner to provide you with efficient and effective services.



Homeless Management Information System (HMIS) Consumers Informed Consent & Release of Information Authorization

I, (print consumer's name) _____, understand that (Service Provider) _____ collected information about me and/or my dependents listed below to enter it into a database system called Homeless Management Information System (HMIS). This database helps us to better understand homelessness, to improve service delivery to the homeless, and to evaluate the effectiveness of services provided to the homeless. Participation in data collection and release, although optional, is a critical component of our community's ability to provide the most effective services and housing possible. The information that is collected in the HMIS database is protected by limiting access to the database and by limiting with whom the information may be shared, in compliance with the standards set forth by federal, state, and local regulations governing confidentiality of client records. Every person and agency that is authorized to read or enter information into the database has signed an agreement to maintain the security and confidentiality of the information.

BY SIGNING THIS FORM, I AUTHORIZE THE FOLLOWING:

The information gathered and prepared by this agency will be included in a HMIS database of participating agencies (list available), and only to participating agencies, who have entered into an HMIS Agency Participation Agreement and shall be used to:

- a. Produce a client profile at intake that will be shared by collaborating agencies
- b. Produce anonymous, aggregate-level reports regarding use of services
- c. Track individual program-level outcomes
- d. Identify unfilled service needs and plan for the provision of new services
- e. Allocate resources among agencies engaged in the provision of services

BY SIGNING THIS FORM, I AUTHORIZE THE FOLLOWING:

I authorize the participating agencies and their representatives to share basic information regarding my family members listed below and/or me. I understand that this information is for the purpose of assessing my/our needs for housing, utility assistance, food, counseling and/or other services.

THE INFORMATION MAY CONSIST OF THE FOLLOWING PPI (PROTECTED PERSONAL INFORMATION):

- | | | |
|---|--------------------------------------|-----------------------------|
| • Name | • Residence Prior to Project Entry | • Domestic Violence |
| • Date of Birth | • Homeless History | • Mental Health |
| • Social Security Number | • Zip Code of Last Permanent Address | • Disabling Condition |
| • Gender | • Family Composition | • Alcohol & Drug |
| • Ethnicity and Race | • Employment Status | • Legal history/information |
| • Program Entry Date | • Veteran Status | • Photo (If applicable) |
| • Program Exit Date | • HIV/AIDS | |
| • Income and Non-Cash Benefits information (sources and amounts of household income, employment information, work skills) | | |
| • Housing information (may include address, type of housing, homeless status, and reason for homelessness) | | |

I UNDERSTAND THAT:

- ✓ Use of my likeness in a photograph will be viewable by other participating agencies and may be cropped or edited, as needed. I waive the right to approve or inspect the finished photograph.
- ✓ Information I give concerning physical or mental health problems will not be shared with other participating agencies in any way that identifies me.
- ✓ The participating agencies have signed agreements to treat my information in a professional and confidential manner. I have the right to view the client confidentiality policies used by the HMIS participating agencies.
- ✓ Staff members of the participating agencies who will see my information have signed agreements to maintain confidentiality regarding my information.

- ✓ The release of my information does not guarantee that I will receive assistance, and my refusal to authorize the use of my information does not disqualify me from receiving assistance.
- ✓ If I revoke my authorization, all information about me already in the database will remain, but will become invisible to all of the participating agencies.
- ✓ My records are protected by federal, state, and local regulations governing confidentiality of client records and cannot be disclosed without my written consent unless otherwise provided for in the regulations.
- ✓ Auditors or funders who have legal rights to review the work of this agency, including the U.S. Department of Housing and Urban Development may see my information
- ✓ Bitfocus, Inc. is Sacramento’s HMIS Vendor. When Bitfocus works on the system, they may see my information.
- ✓ People using HMIS information to write reports may see your information. Researchers must sign an agreement to protect my privacy before seeing HMIS data. My private information will never appear in research reports.
- ✓ This authorization will remain in effect until I revoke it in writing, and I may revoke authorization by signing a “Consumer Revocation of Consent to Release Information form”, but that cancellation will not be retroactive.
- ✓ Additionally, I understand that participation in data collection is optional, and I may choose not to participate.
- ✓ This release is valid for seven (7) years from the date of my signature below. (Yolo County participant releases are valid for five (5) years from the date of my signature below.)
- ✓ I also understand that I may withdraw my consent at any time.
- ✓ I understand that my personal information will not be made public and will only be used with strict confidentiality.

Participating agencies: A list of the participating agencies within the Sacramento Homeless Management Information System may be viewed prior to signing this form.

List all Dependent children under 18 in household, if any (first and last names):

1. _____	2. _____
3. _____	4. _____
5. _____	6. _____
7. _____	8. _____

Please initial one of the following levels of consent:

_____ I give authorization for mine and my dependents listed above, Protected Personal and relevant information **to be entered into the HMIS and shared between participating agencies.**

OR

_____ I give authorization for mine and my dependents listed above Protected Personal and relevant information **to be entered into the HMIS, but not shared between participating agencies.**

OR

_____ I do not consent to the inclusion of personal information in HMIS about me and any dependents listed above.

_____ **Consumer’s Signature** _____ **Date**

_____ **Agency Personnel Name (print)** _____ **Agency Personnel Signature** _____ **Date**

Agencies Participating in Sacramento Homeless Management Information System (HMIS)

WHO SHOULD PARTICIPATE?

HMIS seeks to collect information from all homeless service providers throughout the county. These include agencies that provide housing services (transitional housing, permanent supportive housing, Rapid Re-Housing, emergency shelters, for instance), homeless prevention projects, as well as auxiliary services (such as food shelves, outreach programs, and drop-in centers), and other service providers in contact with people experiencing homelessness. In order to gain as comprehensive a picture of homelessness as possible, other agencies are strongly encouraged to use HMIS as well. Increased participation in HMIS will increase our understanding of clients' characteristics and needs, help us to better evaluate programs, and strengthen our efforts to end homelessness.

Agencies REQUIRED by U.S. Department of Housing and Urban Development (HUD) requires its grantees under the following programs to participate in HMIS:

- Supportive Housing Program (SHP)
- Transitional Housing Program (THP)
- Shelter Plus Care (S+C)
- Housing Opportunities for Persons With AIDS (HOPWA)
- Emergency Solutions Grant (ESG)
- Emergency Shelter Programs (ESP)

Who is currently using the HMIS system in Sacramento County?

211 Sacramento	Sacramento County Re-housing Shelter
Berkeley Food and Housing Project	Sacramento Covered
Bishop Gallegos Maternity Home	Sacramento LGBT Community Center
Bridges, Inc.	Sacramento Recovery House, Inc. (DBA - Gateway)
City of Sacramento	Sacramento Self Help Housing
Community Against Sexual Harm	Sacramento Veterans Resource Center
Cottage Housing, Inc	Saint John's Program For Real Change
Downtown Streets Team	Salvation Army
El Hogar Community Service, Inc.	SHRA - Shelter Plus Care
Flexible Supportive Rehousing Program (Sac County)	TLCS, Inc.
Francis House Center - A Program of Next Move	Turning Point Community Programs
LifeSTEPS	Volunteers Of America
Loaves and Fishes	Waking the Village
Lutheran Social Services	WEAVE
Mercy Housing	WellSpace Health
Next Move (SAEHC)	Wind Youth Services
Resources for Independent Living	Winter Sanctuary
Sacramento County Child Protective Services	Women's Empowerment
Sacramento County Department of Human Assistance	

Who is currently using the HMIS system in Yolo County?

CABHI Yolo	Interfaith Rotating Winter Shelter (IRWS)
City of Davis	New Pathways
City of Woodland	United Christian Centers (UCC)
Davis Community Meals and Housing	Yolo Community Care Continuum
Empower Yolo	Yolo County Children's Alliance
Fourth and Hope	Yolo County Health and Human Services Agency
Housing and Disability Advocacy Program	



Homeless Management Information System (HMIS)

Sacramento/Yolo County Continuum of Care

Homeless Management Information System (HMIS)

Consumer Revocation of Consent to Release Information

I, (print consumer's name) _____, hereby revoke permission to share my family and mine personal information in the Sacramento/Yolo Continuum of Care (CoC) HMIS. I understand that my information will remain in Sacramento and Yolo CoC Homeless Management Information System (HMIS) as part of the non-identifying data collected on homeless services provided by the Continuum of Care.

I understand that information that has already been entered remains in the system. By canceling my agreement for participation in the Sacramento and Yolo CoC HMIS my personal information that has been saved will be restricted.

I further understand that any information entered and/or shared under my previously agreed-to consent will continue to be shared and that this Client Revocation of Consent applies to any information entered into the system from this day forward.

I also understand that the disclosure of my non-identifying information may be required in some instances, such as for the reporting of aggregate numbers to Sacramento and Yolo CoC HMIS Collaborative and to agencies that provide funding to this agency.

Sacramento and Yolo CoC HMIS and this agency are hereby released from any legal responsibility or liability for the release, use or disclosure of information I authorized previously.

I understand that this revocation will become effective immediately upon receipt of my signature below.

Consumer's Signature

Date

Agency Personnel Name (print)

Agency Personnel Signature

Date

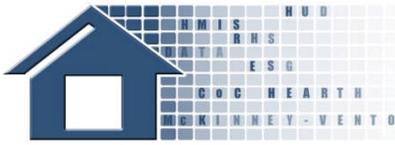
Configuring HMIS : Client does not consent

Field name	Client's Actual Info	Instructions	CLIENT PROFILE	
SSN	123-99-999	000-00-0000	Social Security Number	XXX - XX - XXXX
Quality of SSN		Client Refused	Quality of SSN	Client refused
Last name	Jenkins	Refused	Last Name	A4598Xy
First name	Phil	<i>Your agency's internal ID if you have one, or Consent</i>	First Name	Refused
Quality of Name		Client Refused	Quality of Name	Client refused
Quality of DOB		Approximate	Quality of DOB	Approximate or partial DOB reported
Date of Birth	July 6, 1942	<i>Jan 1 actual year of birth +/- 1 year*</i>	Date of Birth	01/01/1941 Adult. Age: 7
Gender, race, ethnicity, veteran status	Is not Veteran, Male, White	<i>Actual is OK, so long as it's not a give-away</i>	Middle Name	None
			Gender	Male
			Race	White
			Ethnicity	Non-Hispanic/Non-Latino
			Veteran Status	No
		* For <17, subtract at least 1 year		



Homeless Definition

CRITERIA FOR DEFINING HOMELESS	Category 1	Literally Homeless	(1) Individual or family who lacks a fixed, regular, and adequate nighttime residence, meaning: <ul style="list-style-type: none"> (i) Has a primary nighttime residence that is a public or private place not meant for human habitation; (ii) Is living in a publicly or privately operated shelter designated to provide temporary living arrangements (including congregate shelters, transitional housing, and hotels and motels paid for by charitable organizations or by federal, state and local government programs); <u>or</u> (iii) Is exiting an institution where (s)he has resided for 90 days or less <u>and</u> who resided in an emergency shelter or place not meant for human habitation immediately before entering that institution
	Category 2	Imminent Risk of Homelessness	(2) Individual or family who will imminently lose their primary nighttime residence, provided that: <ul style="list-style-type: none"> (i) Residence will be lost within 14 days of the date of application for homeless assistance; (ii) No subsequent residence has been identified; <u>and</u> (iii) The individual or family lacks the resources or support networks needed to obtain other permanent housing
	Category 3	Homeless under other Federal statutes	(3) Unaccompanied youth under 25 years of age, or families with children and youth, who do not otherwise qualify as homeless under this definition, but who: <ul style="list-style-type: none"> (i) Are defined as homeless under the other listed federal statutes; (ii) Have not had a lease, ownership interest, or occupancy agreement in permanent housing during the 60 days prior to the homeless assistance application; (iii) Have experienced persistent instability as measured by two moves or more during in the preceding 60 days; <u>and</u> (iv) Can be expected to continue in such status for an extended period of time due to special needs or barriers
	Category 4	Fleeing/ Attempting to Flee DV	(4) Any individual or family who: <ul style="list-style-type: none"> (i) Is fleeing, or is attempting to flee, domestic violence; (ii) Has no other residence; <u>and</u> (iii) Lacks the resources or support networks to obtain other permanent housing



Homeless Definition

RECORDKEEPING REQUIREMENTS

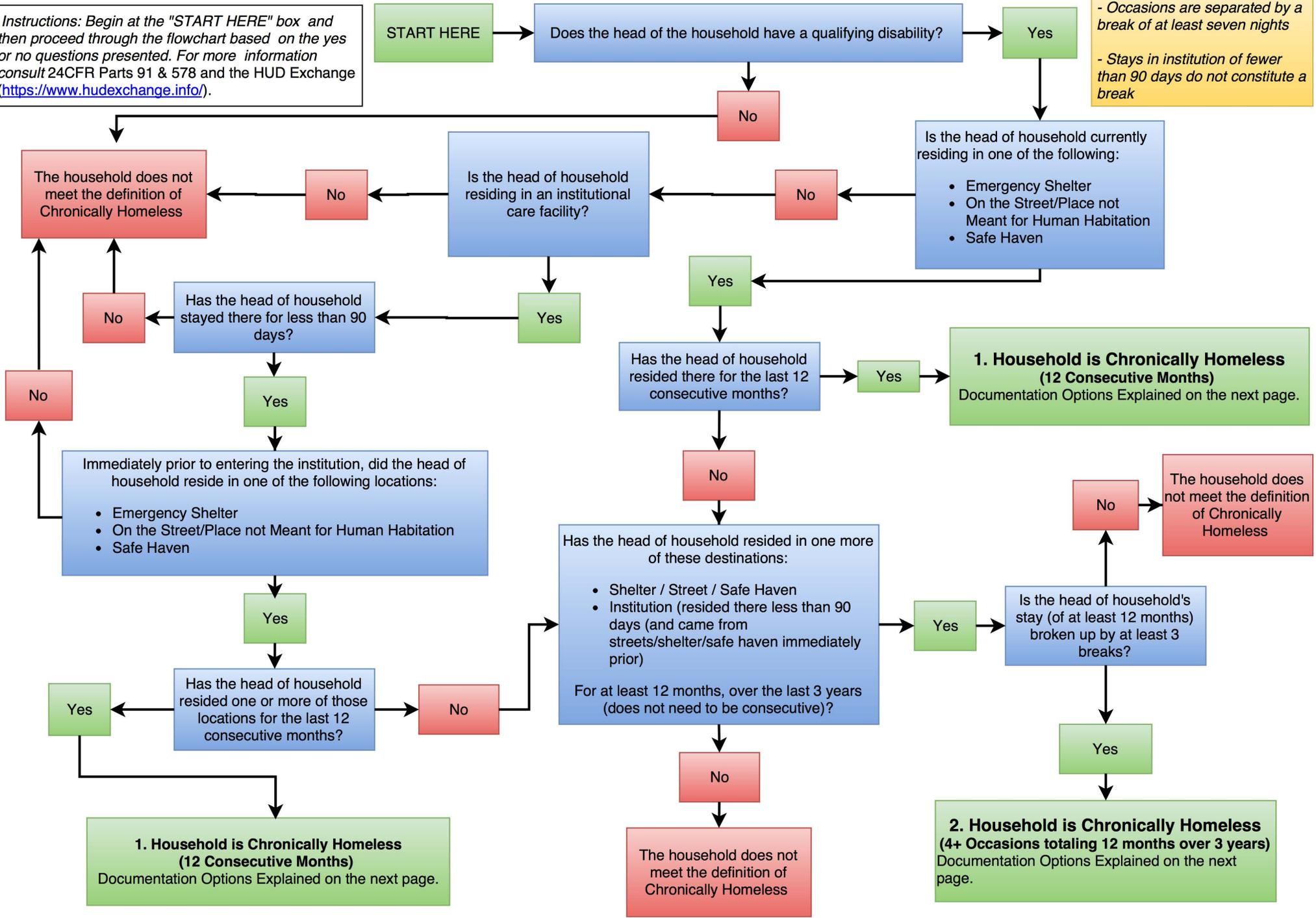


Category 1 Literally Homeless	<ul style="list-style-type: none"> • Written observation by the outreach worker; <u>or</u> • Written referral by another housing or service provider; <u>or</u> • Certification by the individual or head of household seeking assistance stating that (s)he was living on the streets or in shelter; • For individuals exiting an institution—one of the forms of evidence above <u>and</u>: <ul style="list-style-type: none"> ○ discharge paperwork <u>or</u> written/oral referral, <u>or</u> ○ written record of intake worker’s due diligence to obtain above evidence <u>and</u> certification by individual that they exited institution 	
	Category 2 Imminent Risk of Homelessness	<ul style="list-style-type: none"> • A court order resulting from an eviction action notifying the individual or family that they must leave; <u>or</u> • For individual and families leaving a <u>hotel</u> or <u>motel</u>—evidence that they lack the financial resources to <u>stay</u>; <u>or</u> • A documented and verified oral statement; <u>and</u> • Certification that no subsequent residence has been identified; <u>and</u> • Self-certification or other written documentation that the individual lack the financial resources and support necessary to obtain permanent housing
	Category 3 Homeless under other Federal statutes	<ul style="list-style-type: none"> • Certification by the nonprofit or state or local government that the individual or head of household seeking assistance met the criteria of homelessness under another federal statute; <u>and</u> • Certification of no PH in last 60 days; <u>and</u> • Certification by the individual or head of household, and any available supporting documentation, that (s)he has moved two or more times in the past 60 days; <u>and</u> • Documentation of special needs <u>or</u> 2 or more barriers
	Category 4 Fleeing/ Attempting to Flee DV	<ul style="list-style-type: none"> • <i>For victim service providers:</i> <ul style="list-style-type: none"> ○ An oral statement by the individual or head of household seeking assistance which states: they are fleeing; they have no subsequent residence; and they lack resources. Statement must be documented by a self-certification or a certification by the intake worker. • <i>For non-victim service providers:</i> <ul style="list-style-type: none"> ○ Oral statement by the individual or head of household seeking assistance that they are fleeing. This statement is documented by a self-certification or by the caseworker. Where the safety of the individual or family is not jeopardized, the oral statement must be verified; <u>and</u> ○ Certification by the individual or head of household that no subsequent residence has been identified; <u>and</u> ○ Self-certification, or other written documentation, that the individual or family lacks the financial resources and support networks to obtain other permanent housing.

Flowchart of HUD's Definition of Chronic Homelessness

Instructions: Begin at the "START HERE" box and then proceed through the flowchart based on the yes or no questions presented. For more information consult 24CFR Parts 91 & 578 and the HUD Exchange (<https://www.hudexchange.info/>).

Remember:
 - Occasions are separated by a break of at least seven nights
 - Stays in institution of fewer than 90 days do not constitute a break





Documentation Standards for Chronic Homelessness

Instructions: Based on your navigation of the flowchart on the previous page, locate the appropriate numbered situation on this page and follow the documentation standards noted. This tool summarizes the criteria for the new Chronically Homeless Definition. To review the exact language, please refer to 24 CFR Parts 91 & 578 and the HUD Exchange (<https://www.hudexchange.info/homelessness-assistance/resources-for-chronic-homelessness/>)

Situation	Documentation of Homelessness	Documentation of Disability
<p>1. Household is Chronically Homeless</p> <p>(12 Consecutive Months)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> HMIS record or record from a comparable database; or <input type="checkbox"/> Written observation by an outreach worker of the conditions where the individual was living; or <input type="checkbox"/> Written referral by another housing or service provider; or <input type="checkbox"/> Where the evidence above is unavailable, there must be a certification by the individual seeking assistance, accompanied by the intake worker's documentation of the living situation and the steps taken to obtain the evidence listed above. <p>If the head of household is currently staying in an institution where they have been for less than 90 days (and were in a shelter/street/safe haven immediately prior) their Institutional Stay can be documented by:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Discharge paperwork or written/oral referral from a social worker or appropriate official of the institutional facility, with start/end dates of client's residence, or <input type="checkbox"/> Where the evidence above is unavailable, there must be a certification by the individual seeking assistance, accompanied by the intake worker's documentation of the living situation and the steps taken to obtain the evidence listed above. 	<p>Documentation of the head of household's disability, including:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Written verification of the disability from a licensed professional; <input type="checkbox"/> Written verification from the Social Security Administration; <input type="checkbox"/> The receipt of a disability check; or <input type="checkbox"/> Intake staff-recorded observation of disability that, no later than 45 days from the application for assistance, accompanied by supporting evidence.
<p>2. Household is Chronically Homeless</p> <p>(4+ Occasions totaling 12 months over 3 years)*</p> <p><i>*May include institution stays of <90 days</i></p>	<ul style="list-style-type: none"> <input type="checkbox"/> HMIS record or record from a comparable database; or <input type="checkbox"/> Written observation by an outreach worker of the conditions where the individual was living; or <input type="checkbox"/> Written referral by another housing or service provider; or <input type="checkbox"/> Discharge paperwork or written/oral referral from a social worker or appropriate official of the institutional facility, with start/end dates of client's residence (for institutional stays of less than 90 days) <input type="checkbox"/> Where the evidence above is unavailable, there must be a certification by the individual seeking assistance, accompanied by the intake worker's documentation of the living situation and the steps taken to obtain the evidence listed above. <p><i>* Each separate occasion MUST be documented (minimum of 3 breaks). 100% of the breaks can be documented by self- report.</i></p>	<p>Documentation of the head of household's disability, including:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Written verification of the disability from a licensed professional; <input type="checkbox"/> Written verification from the Social Security Administration; <input type="checkbox"/> The receipt of a disability check; or <input type="checkbox"/> Intake staff-recorded observation of disability that, no later than 45 days from the application for assistance, accompanied by supporting evidence.

Important Notes:

- Each individual occasion needs to be fully documented.
- Breaks can be documented by self-report.
- For each Project:
 - 100% of households served can use self-certification for 3 months of their 12 months,
 - 75% of households served need to use 3rd Party documentation for 9 months of their 12 months, and
 - 25% of households served can use self-certification as documentation for any and all months.

Sacramento Continuum of Care HMIS Exit Destination Guidance

The Exit Destination describes where the client will be staying after they leave the program. Destination options include:

- Permanent
- Temporary
- Institutional Setting
- Other

For clients who will be staying with family or friends, select the response that includes the expected tenure of the destination (permanent or temporary).

For rental by client and owned by client, select the response that includes the type of housing subsidy, if any, the client will be receiving.

A housing subsidy may be tenant, project, or sponsor based and provides ongoing assistance to reduce rent burden. This includes either a housing subsidy provided through the Veterans Affairs Supportive Housing (VASH) program or other housing subsidy. Other housing subsidies may include:

- HUD-funded subsidy (for example, public housing, Housing Choice Voucher or Section 8)
- Other housing subsidy (for example, state rental assistance voucher)

<u>Permanent Destinations</u>	<u>Explanation</u>
Moved from one HOPWA funded project to HOPWA PH	Client exited one HOPWA funded project into HOPWA PH
Owned by Client, no ongoing housing subsidy	The unit the client is living in is owned by him or her and has no ongoing housing subsidy attached to it.
Owned by client, with ongoing housing subsidy	The unit the client is living in is owned by him or her and has an ongoing housing subsidy (mortgage payment support) attached to it. Includes USDA Rural Development Loan/Recovery Act Supports.
Rental by client, no ongoing housing subsidy	The unit the client is renting is not supported by any government or private subsidy.
Rental by client, VASH Subsidy	The unit the client is renting is being supported by a VASH subsidy. VASH (Veterans Affairs Supportive Housing)
Rental by client, GPD TIP housing subsidy	The unit the client is renting is being supported by a GPD TIP subsidy. GPD TIP (Grant and Per Diem Program – Transition in Place)
Rental by client, other ongoing housing subsidy	The unit the client is renting is being supported by a subsidy – either government or private, either site-based or voucher. Includes Section 8, HARP, HCV, State Rental Assistance (SER) and HPRP.
Permanent housing for formerly homeless persons	The unit the client is renting is being subsidized by any homeless funding source. This could be a scattered-site or site-based supportive housing where the rental subsidy is from: Shelter Plus Care Supportive Housing Program Rapid-Re-housing, or a local source of subsidy restricted strictly for homeless persons.

	<p>The following table shows some examples of Sacramento projects that are Permanent housing for formerly homeless persons:</p> <table border="1"> <thead> <tr> <th data-bbox="509 159 894 197"><u>Agency</u></th> <th data-bbox="894 159 1520 197"><u>Project Name</u></th> </tr> </thead> <tbody> <tr><td>Cottage Housing Inc.</td><td>McClellan Park Permanent Supportive Housing</td></tr> <tr><td>Cottage Housing Inc.</td><td>Quinn Cottages</td></tr> <tr><td>Lutheran Social Services</td><td>Achieving Community Change Together</td></tr> <tr><td>Lutheran Social Services</td><td>Adolfo PSH Program</td></tr> <tr><td>Lutheran Social Services</td><td>Mutual Housing At the Highlands</td></tr> <tr><td>Lutheran Social Services</td><td>Rapid Re-Housing Programs (Connections & Youth)</td></tr> <tr><td>Lutheran Social Services</td><td>Saybrook Permanent Supportive Housing Project</td></tr> <tr><td>Mercy Housing</td><td>Budget Inn</td></tr> <tr><td>Mercy Housing</td><td>Mather Veteran's Village</td></tr> <tr><td>Mercy Housing</td><td>The King Project</td></tr> <tr><td>Next Move/SAEHC</td><td>Casas De Esperanza</td></tr> <tr><td>Next Move/SAEHC</td><td>Home At Last</td></tr> <tr><td>Next Move/SAEHC</td><td>Omega Permanent Supportive Housing Project</td></tr> <tr><td>Next Move/SAEHC</td><td>Omega Expansion</td></tr> <tr><td>Next Move/SAEHC</td><td>Rapid Re-Housing Programs (Stepping Stones)</td></tr> <tr><td>Sac County Department of Human Assistance (DHA)</td><td>Rapid Re-Housing Program (HSP)</td></tr> <tr><td>Sacramento Housing and Redevelopment Agency (SHRA)</td><td>Shasta Hotel SRA</td></tr> <tr><td>Sacramento Housing and Redevelopment Agency (SHRA)</td><td>Shelter Plus Care</td></tr> <tr><td>Sacramento Self Help Housing</td><td>Friendship Housing</td></tr> <tr><td>Sacramento Self Help Housing</td><td>New Community</td></tr> <tr><td>Saint John's Program for Real Change</td><td>Program For Women and Children</td></tr> <tr><td>Step Up Sacramento</td><td>Collaboration between Next Move, LSS and Wind Youth</td></tr> <tr><td>TLCS, Inc.</td><td>Co-op Program</td></tr> <tr><td>TLCS, Inc.</td><td>Hotel Berry</td></tr> <tr><td>TLCS, Inc.</td><td>Housing Voucher Programs (Dream, Wish, WORK, etc.)</td></tr> <tr><td>Volunteers of America</td><td>NOVA House Permanent Supportive Housing Project</td></tr> <tr><td>Volunteers of America</td><td>Rapid RE-Housing Programs (ESG, Vet Families, etc.)</td></tr> <tr><td>Wind Youth & Waking the Village Collaboration</td><td>The Doorway Rapid Re-Housing Program</td></tr> </tbody> </table>	<u>Agency</u>	<u>Project Name</u>	Cottage Housing Inc.	McClellan Park Permanent Supportive Housing	Cottage Housing Inc.	Quinn Cottages	Lutheran Social Services	Achieving Community Change Together	Lutheran Social Services	Adolfo PSH Program	Lutheran Social Services	Mutual Housing At the Highlands	Lutheran Social Services	Rapid Re-Housing Programs (Connections & Youth)	Lutheran Social Services	Saybrook Permanent Supportive Housing Project	Mercy Housing	Budget Inn	Mercy Housing	Mather Veteran's Village	Mercy Housing	The King Project	Next Move/SAEHC	Casas De Esperanza	Next Move/SAEHC	Home At Last	Next Move/SAEHC	Omega Permanent Supportive Housing Project	Next Move/SAEHC	Omega Expansion	Next Move/SAEHC	Rapid Re-Housing Programs (Stepping Stones)	Sac County Department of Human Assistance (DHA)	Rapid Re-Housing Program (HSP)	Sacramento Housing and Redevelopment Agency (SHRA)	Shasta Hotel SRA	Sacramento Housing and Redevelopment Agency (SHRA)	Shelter Plus Care	Sacramento Self Help Housing	Friendship Housing	Sacramento Self Help Housing	New Community	Saint John's Program for Real Change	Program For Women and Children	Step Up Sacramento	Collaboration between Next Move, LSS and Wind Youth	TLCS, Inc.	Co-op Program	TLCS, Inc.	Hotel Berry	TLCS, Inc.	Housing Voucher Programs (Dream, Wish, WORK, etc.)	Volunteers of America	NOVA House Permanent Supportive Housing Project	Volunteers of America	Rapid RE-Housing Programs (ESG, Vet Families, etc.)	Wind Youth & Waking the Village Collaboration	The Doorway Rapid Re-Housing Program
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<p>Staying or Living With Family – Permanent Tenure</p>	<p>The client has moved into a room, apartment or house occupied by a family member and is intending on living there.</p> <p>Use “permanent” if the client has NOT been given a specific time limit in which he/she needs to leave or if exit destination is short term but leads to a permanent destination such as doubled up for two weeks until an apartment is ready.</p>																																																										
<p>Staying or Living With Friends – Permanent Tenure</p>	<p>The client has moved into a room, apartment or house occupied by a friend and is intending on living there.</p> <p>Use “permanent” if the client has NOT been given a specific time limit in which he/she needs to leave or if exit destination is short term but leads to a permanent destination such as doubled up for two weeks until an apartment is ready. Includes clients who leave for Job Corps, college, Military or National Guard training.</p>																																																										

<u>Temporary Destinations</u>	<u>Explanation</u>																																																				
Emergency shelter, including hotel or motel paid for with voucher	<p>The client has exited to an Emergency Shelter, including:</p> <ul style="list-style-type: none"> • A hotel or motel paid for with an emergency shelter voucher. • Domestic Violence shelter • Missions <p>The following table shows some Sacramento programs that fall under this category:</p> <table border="1" data-bbox="506 352 1516 1541"> <thead> <tr> <th data-bbox="506 352 886 390"><u>Agency</u></th> <th data-bbox="886 352 1516 390"><u>Project Name</u></th> </tr> </thead> <tbody> <tr><td data-bbox="506 390 886 428">Francis House</td><td data-bbox="886 390 1516 428">Emergency Hotel Vouchers</td></tr> <tr><td data-bbox="506 428 886 466">HART Elk Grove</td><td data-bbox="886 428 1516 466">Elk Grove Winter Sanctuary</td></tr> <tr><td data-bbox="506 466 886 504">Interfaith Network</td><td data-bbox="886 466 1516 504">Family Promise Center</td></tr> <tr><td data-bbox="506 504 886 541">Loaves and Fishes</td><td data-bbox="886 504 1516 541">Sister Nora's Place</td></tr> <tr><td data-bbox="506 541 886 617">Sacramento Area Emergency Housing Center/Next Move</td><td data-bbox="886 541 1516 617">Family Shelter</td></tr> <tr><td data-bbox="506 617 886 680">Sacramento Area Emergency Housing Center/Next Move</td><td data-bbox="886 617 1516 680">Motel Voucher Program</td></tr> <tr><td data-bbox="506 680 886 743">Sacramento Area Emergency Housing Center/Next Move</td><td data-bbox="886 680 1516 743">Winter Overflow Shelter</td></tr> <tr><td data-bbox="506 743 886 781">Sacramento Self Help Housing</td><td data-bbox="886 743 1516 781">Cathedral/ Downtown Housing</td></tr> <tr><td data-bbox="506 781 886 819">Sacramento Self Help Housing</td><td data-bbox="886 781 1516 819">Interim Houses</td></tr> <tr><td data-bbox="506 819 886 856">Sacramento Self Help Housing</td><td data-bbox="886 819 1516 856">T-3 Program</td></tr> <tr><td data-bbox="506 856 886 894">Sacramento Steps Forward</td><td data-bbox="886 856 1516 894">Winter Sanctuary</td></tr> <tr><td data-bbox="506 894 886 932">Safe Ground Sacramento</td><td data-bbox="886 894 1516 932">Safe Ground Pilgrimage</td></tr> <tr><td data-bbox="506 932 886 1008">Saint John's Program for Real Change</td><td data-bbox="886 932 1516 1008">Cal Works Emergency Shelter Program</td></tr> <tr><td data-bbox="506 1008 886 1045">Salvation Army</td><td data-bbox="886 1008 1516 1045">Interim Care Program</td></tr> <tr><td data-bbox="506 1045 886 1083">Salvation Army</td><td data-bbox="886 1045 1516 1083">Lodge Program</td></tr> <tr><td data-bbox="506 1083 886 1121">Salvation Army</td><td data-bbox="886 1083 1516 1121">Salvation Army Veteran's</td></tr> <tr><td data-bbox="506 1121 886 1159">TLCS, Inc.</td><td data-bbox="886 1121 1516 1159">Palmer Apartments</td></tr> <tr><td data-bbox="506 1159 886 1234">Turning Point Community Programs</td><td data-bbox="886 1159 1516 1234">Turning Point Emergency Motel Voucher Program</td></tr> <tr><td data-bbox="506 1234 886 1272">Union Gospel Mission</td><td data-bbox="886 1234 1516 1272">Emergency Shelter</td></tr> <tr><td data-bbox="506 1272 886 1310">Volunteers of America</td><td data-bbox="886 1272 1516 1310">Bannon Street Family Emergency Shelter</td></tr> <tr><td data-bbox="506 1310 886 1348">Volunteers of America</td><td data-bbox="886 1310 1516 1348">North A Street Emergency Shelter</td></tr> <tr><td data-bbox="506 1348 886 1386">Volunteers of America</td><td data-bbox="886 1348 1516 1386">Open Arms</td></tr> <tr><td data-bbox="506 1386 886 1423">Volunteers of America</td><td data-bbox="886 1386 1516 1423">Winter Shelter Program</td></tr> <tr><td data-bbox="506 1423 886 1461">WIND</td><td data-bbox="886 1423 1516 1461">Youth Center</td></tr> <tr><td data-bbox="506 1461 886 1537">Women Escaping A Violent Environment</td><td data-bbox="886 1461 1516 1537">Emergency Shelter Program</td></tr> </tbody> </table>	<u>Agency</u>	<u>Project Name</u>	Francis House	Emergency Hotel Vouchers	HART Elk Grove	Elk Grove Winter Sanctuary	Interfaith Network	Family Promise Center	Loaves and Fishes	Sister Nora's Place	Sacramento Area Emergency Housing Center/Next Move	Family Shelter	Sacramento Area Emergency Housing Center/Next Move	Motel Voucher Program	Sacramento Area Emergency Housing Center/Next Move	Winter Overflow Shelter	Sacramento Self Help Housing	Cathedral/ Downtown Housing	Sacramento Self Help Housing	Interim Houses	Sacramento Self Help Housing	T-3 Program	Sacramento Steps Forward	Winter Sanctuary	Safe Ground Sacramento	Safe Ground Pilgrimage	Saint John's Program for Real Change	Cal Works Emergency Shelter Program	Salvation Army	Interim Care Program	Salvation Army	Lodge Program	Salvation Army	Salvation Army Veteran's	TLCS, Inc.	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Hotel or motel paid for without emergency shelter voucher	The client has exited to a hotel or motel and is paying for it themselves (no voucher).																																																				
Safe Haven (Do Not Use)	<p>DO NOT USE THIS RESPONSE!!!!</p> <p>Sacramento CoC doesn't have not have any HUD specific program that was formally designated as a Safe Haven.</p>																																																				

<p>Transitional Housing for homeless persons (including youth)</p>	<p>The client has exited to a Transitional Housing program for the homeless which is housing with supports that is time limited up to 24 months.</p> <p>The following table shows some Sacramento programs that fall under this category:</p> <table border="1" data-bbox="511 247 1507 934"> <thead> <tr> <th data-bbox="511 247 857 289"><u>Agency</u></th> <th data-bbox="857 247 1507 289"><u>Project Name</u></th> </tr> </thead> <tbody> <tr> <td data-bbox="511 289 857 331">Clean and Sober</td> <td data-bbox="857 289 1507 331">New Life</td> </tr> <tr> <td data-bbox="511 331 857 394">Resources For Independent Living</td> <td data-bbox="857 331 1507 394">Transitional Living Center</td> </tr> <tr> <td data-bbox="511 394 857 457">Sacramento Self Help Housing</td> <td data-bbox="857 394 1507 457">Grace House & Meadow House</td> </tr> <tr> <td data-bbox="511 457 857 499">Salvation Army</td> <td data-bbox="857 457 1507 499">Transitional Living Program</td> </tr> <tr> <td data-bbox="511 499 857 541">Union Gospel Mission</td> <td data-bbox="857 499 1507 541">Transitional Housing For Men</td> </tr> <tr> <td data-bbox="511 541 857 604">Veterans Resource Centers of America</td> <td data-bbox="857 541 1507 604">GDP Sacramento Veterans Resource Center</td> </tr> <tr> <td data-bbox="511 604 857 667">Veterans Resource Centers of America</td> <td data-bbox="857 604 1507 667">GDP Women's Transitional Housing</td> </tr> <tr> <td data-bbox="511 667 857 730">Veterans Resource Centers of America</td> <td data-bbox="857 667 1507 730">GPD - Behavioral Health Center</td> </tr> <tr> <td data-bbox="511 730 857 772">Volunteers of America</td> <td data-bbox="857 730 1507 772">Adolfo THP-Plus Housing For Foster Youth</td> </tr> <tr> <td data-bbox="511 772 857 814">Volunteers of America</td> <td data-bbox="857 772 1507 814">Adolfo Transitional Housing for Foster Youth (HUD)</td> </tr> <tr> <td data-bbox="511 814 857 856">Volunteers of America</td> <td data-bbox="857 814 1507 856">Independent Living and Readiness Program</td> </tr> <tr> <td data-bbox="511 856 857 898">Volunteers of America</td> <td data-bbox="857 856 1507 898">Mather Community Campus</td> </tr> <tr> <td data-bbox="511 898 857 934">Waking The Village</td> <td data-bbox="857 898 1507 934">Tubman House</td> </tr> </tbody> </table> <p>NOTE: Doesn't include an exit to substance abuse treatment facility.</p>	<u>Agency</u>	<u>Project Name</u>	Clean and Sober	New Life	Resources For Independent Living	Transitional Living Center	Sacramento Self Help Housing	Grace House & Meadow House	Salvation Army	Transitional Living Program	Union Gospel Mission	Transitional Housing For Men	Veterans Resource Centers of America	GDP Sacramento Veterans Resource Center	Veterans Resource Centers of America	GDP Women's Transitional Housing	Veterans Resource Centers of America	GPD - Behavioral Health Center	Volunteers of America	Adolfo THP-Plus Housing For Foster Youth	Volunteers of America	Adolfo Transitional Housing for Foster Youth (HUD)	Volunteers of America	Independent Living and Readiness Program	Volunteers of America	Mather Community Campus	Waking The Village	Tubman House
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Waking The Village	Tubman House																												
<p>Moved from one HOPWA funded project to HOPWA TH</p>	<p>The client exited one HOPWA funded project to enter HOPWA TH</p>																												
<p>Staying or Living With Family – Temporary Tenure</p>	<p>The client has exited to a room, apartment or house occupied by a family member and is intending on staying there only a short time. Use “temporary” if client is given a time limit in which he/she needs to leave or if the Case Manager has knowledge that the destination is meant to be very short term and/or is lacking stability, such as overcrowding (more than 1.5 persons per room).</p>																												
<p>Staying or Living With Friends – Temporary Tenure</p>	<p>The client has exited to a room, apartment or house occupied by a friend and is intending on staying there only a short time. Use “temporary” if client is given a time limit in which he/she needs to leave or if the Case Manager has knowledge that the destination is meant to be very short term and/or is lacking stability, such as overcrowding (more than 1.5 persons per room).</p>																												
<p>Place Not Meant for Habitation</p>	<p>The client has returned to the streets or anyplace not meant for human habitation, including:</p> <ul style="list-style-type: none"> • a vehicle • abandoned building • bus/train/subway/airport station • campsite • anywhere outside 																												

<u>Institutional Settings</u>	<u>Explanation</u>
Foster Care Home or Foster Care Group Home	The client has exited to: <ul style="list-style-type: none"> • an adult or child foster care home • a foster care group home
Psychiatric hospital or other psychiatric facility	The client has exited to a: <ul style="list-style-type: none"> • psychiatric facility • psychiatric hospital • psychiatric unit of a local hospital
Residential project or halfway house with no homeless criteria	The client has exited to a halfway house or residential project that does not require homeless status for entry.
Substance Abuse Treatment facility or Detox center	The client has exited to: <ul style="list-style-type: none"> • a substance abuse treatment program • a detox program • other substance abuse residential facility
Hospital or other non-psychiatric medical facility	The client has exited to a hospital for any reason other than psychiatric. Includes any residential care involving a medical need such as: <ul style="list-style-type: none"> • hospital • rehabilitation center
Long-term care facility or nursing home	The client has exited to a long-term care facility or nursing home.
Jail, prison or juvenile detention facility	The client has been arrested and is residing in a: <ul style="list-style-type: none"> • local jail • prison (state or federal) • juvenile detention facility

<u>Other Destinations</u>	<u>Explanation</u>
Deceased	The client died while in the program.
No Exit Interview Completed	An exit interview was not completed for this client. This will translate as missing information on data quality reports.
Other	Some place other than what is able to be recorded in any of the above fields. (Must specify if Other is chosen)
Client Doesn't Know	The client exited the program without telling program staff where he or she was going.
Client Refused	The client exited the program and refused telling program staff where he or she was going.