

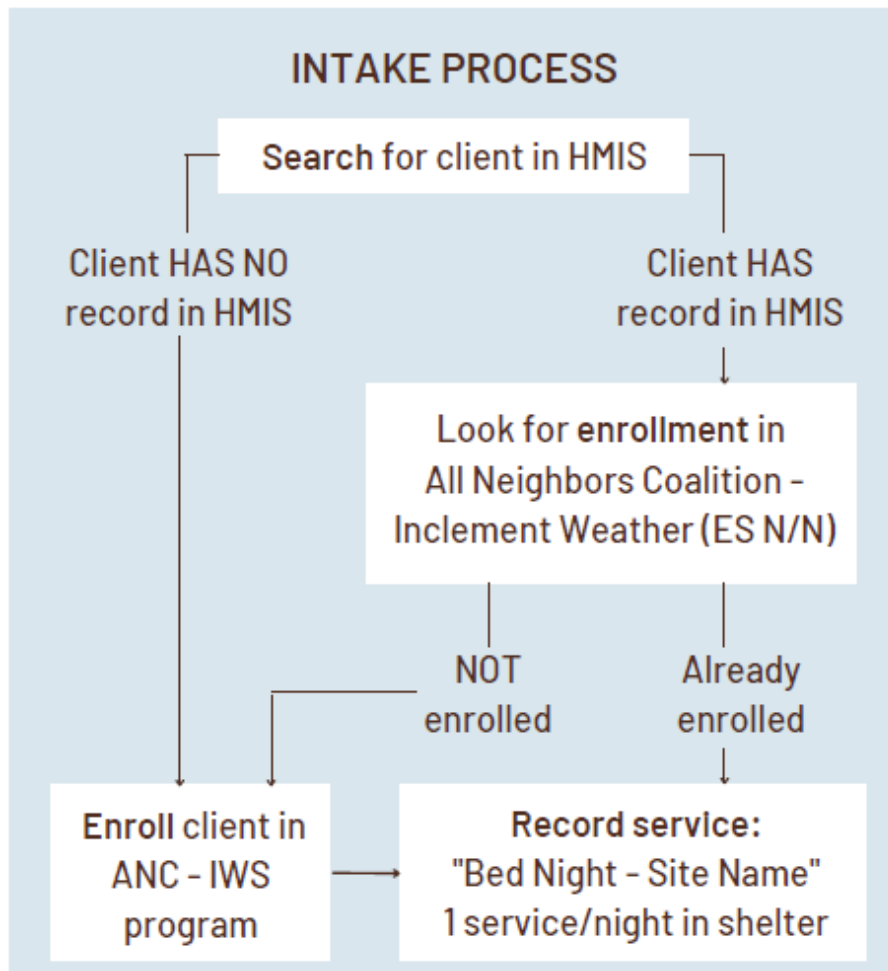


# ClientTrack HMIS Data Entry Guide for Inclement Weather

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## Inclement Weather Data Collection Process

Steps	Reminders
<b>Informed Consent/Privacy</b>	<ul style="list-style-type: none"> <li>Briefly explain that our system shares information with other service providers who are trained on how to keep their personal information private and they have the right to decline to answer any question</li> </ul>
<b>Search for Neighbor in ClientTrack</b>	<ul style="list-style-type: none"> <li>Use 2-3 letters of first and last name, confirm DOB or SSN to deduplicate</li> <li>If neighbor has active IWS enrollment, skip to Bed Night service</li> </ul>
<b>Enrollment</b>	<ul style="list-style-type: none"> <li>Complete HMIS Intake for neighbor and enroll them in IWS program.</li> <li>Use the job aid for data quality reminders on collecting certain data</li> </ul>
<b>Bed Night Service</b>	<ul style="list-style-type: none"> <li>Create a new service and record a Bed Night for the site you are working</li> <li>Confirm that you are recording the service for the correct date</li> </ul>



### ORGANIZATION:

All Neighbors Coalition

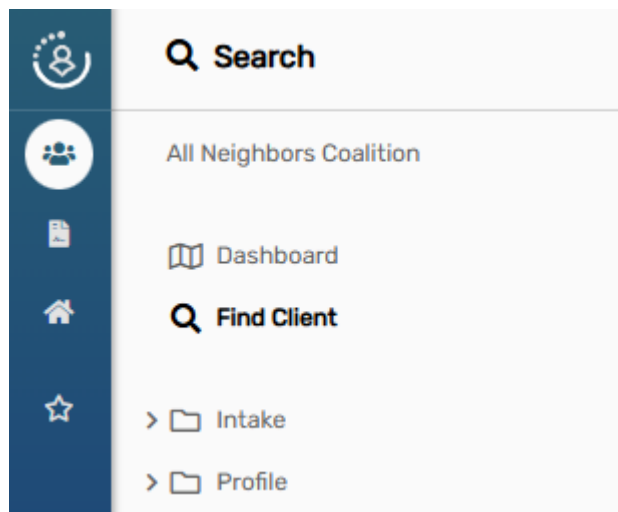
### WORKGROUP:

HMIS Programs

### PROGRAM:

All Neighbors Coalition

## Step 1: Search for the Client in HMIS



### BEST PRACTICES TO AVOID DUPLICATION

- Search using only first 2-3 letters of first and last name
- Search in multiple ways
  - DATE OF BIRTH
  - ONLY ONE NAME (FIRST OR LAST) + OTHER INITIAL
  - ALIAS
- Search multiple spellings
- Swap first and last name

### IF YOU FIND A DUPLICATE CLIENT

- Submit a help desk ticket with both client IDs
- HMIS admins will merge the records, and the client will keep their *oldest* ClientTrack client ID

### IF IN DOUBT...






Create a new client record and submit a ticket with both IDs immediately. The HMIS can review the data and make the best determination.

*If the client is not found, proceed to Step 3.*

## Step 2: Determine if the Neighbor has an open IWS enrollment.

Open the clients' HMIS dashboard and view all open enrollments.

If there is an open enrollment for All Neighbors Coalition – Inclement Weather (ES N/N), then skip to Step 4 to create a new Bed Night.

Enrollment Description	Active Household Members	Household Type	Project Start Date 	Project Exit Date 
 <a href="#">Active</a>				
 Emergency Shelter - Night-by-Night				
 All Neighbors Coalition - Inclement Weather (ES N/N)	1	Adults Only	12/08/2025	

If there is no open enrollment for All Neighbors Coalition – Inclement Weather (ES N/N), proceed to Step 3.

### Step 3. Creating a new enrollment for IWS

If the client is new to HMIS, select “Add a new client”

If the client’s information is present, select “Use the current client”

The screenshot shows the ClientTrack interface. On the left is a sidebar with navigation icons and a search bar. The main area displays the 'Intake' section for a client named 'test test' with ClientID '156341'. A dialog box titled 'Add or Edit' is open, asking 'Do you want to add a new client or use the selected client?'. The dialog has three options: 'Add a new client' (with a plus icon), 'Use the current client' (with a pencil icon), and 'Select another client' (with a magnifying glass icon). The 'Add or Edit' dialog also shows a 'Pause' button and a 'Cancel' button.

### Client Information - Name

- Ask for spelling of name always
- Enter full names if possible

The screenshot shows the 'Client Information' form. The top header displays 'Good Neighbor' and 'ClientID 156341'. The 'Basic Client Information' section is highlighted. It contains a text box for 'First Name' with the value 'Good', a text box for 'Last Name' with the value 'Neighbor', a text box for 'Middle Name', and a text box for 'Suffix'. Below these is a dropdown menu for 'Name Quality' with the value 'Full name reported'. A blue box highlights the 'Last Name' field.

## SSN

- If existing client, confirm any SSN that is entered
- Never use filler digits for partial SSN

### Partial SSN

**Correct Example:**

Social Security Number:  -  - 3455 ⓘ

SSN Quality: \* ☒ Approximate or partial SSN reported

**Incorrect Example:**

Social Security Number: 000 - 00 - 3455 ⓘ

SSN Quality: \* ☐ Full SSN

### Missing SSN

**Correct Example:**

Social Security Number:  -  -  ⓘ

SSN Quality: \* ☐ Full SSN

☒ Client doesn't know

☐ Client prefers not to answer

☐ Data not collected

**Incorrect Example:**

Social Security Number: 111 - 11 - 1111 ⓘ

SSN Quality: \* ☐ Full SSN

Social Security Number:  -  - 2131 ⓘ

SSN Quality: \* ☒ Approximate or partial SSN reported

☐ Client doesn't know

☐ Client prefers not to answer

☐ Data not collected

### Date of birth

- If the neighbor does not know their birth date, determine the approximate year, and enter January 1<sup>st</sup> with that year. Indicate that this is a partial DOB.
- Confirm whether you are entering full or partial

Good Neighbor 10/1/2000 -- ClientID 156341

### Client Information

Birth Date: \* 10/01/2000

Client Age: 25

Date of Birth Quality: \*

- ☐ Full DOB Reported
- ☒ Approximate or Partial DOB Reported
- ☐ Client doesn't know
- ☐ Client prefers not to answer
- ☐ Data not collected

### Race & Ethnicity

- Record the Race and Ethnicity of the neighbor.
- Multiple selections are possible for each neighbor.
- Please utilize the Additional Race and Ethnicity Detail field to provide any additional information.

Good Neighbor 10/1/2000 -- ClientID 156341

### Client Information

Race and Ethnicity: \*

- American Indian, Alaska Native, or Indigenous
- Asian or Asian American
- Black, African American, or African
- ✓ Hispanic/Latina/o
- Middle Eastern or North African

Additional Race and Ethnicity Detail:

## Sex

- Record the sex of each person assisted in the project.
- If a person prefers not to provide a response or says they don't know, do not select any response other than "Client doesn't know" or "Client prefers not to answer" on the person's behalf.
- This may be a new element for the client, as it recently became a requirement.

Intake

Client, Video  
1/1/2000

ClientID  
9795

Basic Client Information

Family Members

Program Enrollment

Pause Cancel

Client Information

Race and Ethnicity: \*  
American Indian, Alaska Native, or Indigenous  
Asian or Asian American  
✓ Black, African American, or African  
Hispanic/Latina/o  
Middle Eastern or North African

Additional Race and Ethnicity Detail:

Sex: Female

Gender:  
✓ Woman (Girl, if child)  
Man (Boy, if child)  
Culturally Specific Identity (e.g., Two-Spirit)  
Transgender  
Not Discussed

Pregnancy Status: -- SELECT --

Veteran Status: \* No

Contact Information

Finish

## Veteran Status

- Enter the client's Veteran Status
- Tip: How to ask the question - "Have you actively served in any branch of the U.S. military including Space Force, National Guard, or Reserves?"

Good Neighbor  
10/1/2000

ClientID  
156341

Client Information

Veteran Status: \* No



## Project Selection

- Select **All Neighbors Coalition – Inclement Weather (ES N/N)**

Intake

Good Neighbor  
10/1/2000

ClientID  
156341

Basic Client Information

Family Members

**Program Enrollment**

Pause

Cancel

HUD Program Enrollment

Select the Project you are enrolling the client into. ClientTrack will display a list of clients in the client's family. Please select all the clients you are enrolling.

The **Project Start Date** is:

- For **Street Outreach** projects – it is the date of first contact with the client.
- For **Emergency Shelters** – it is the night the client first stayed in the shelter for the consecutive shelter period from entry to exit. Night by night shelters, which use a bed-night tracking method will have a project start date and will allow clients to re-enter as necessary without “exiting and restarting” for each stay for a specified period.
- For **Safe Havens** and **Transitional Housing** – it is the date the client moves into the residential project (i.e. first night in residence).
- For all types of **Permanent Housing**, including **Rapid Re-Housing** – it is the date following application that the client was admitted into the project. To be admitted indicates the following factors have been met:
  - Information provided by the client or from the referral indicates they meet the criteria for admission (for example if chronic homelessness is required the client indicates they have a serious disability and have been homeless long enough to qualify – though all documentation may not yet have been gathered)
  - The client has indicated they want to be housed in this project
  - The client is able to access services and housing through the project. The expectation is the project has a housing opening (on-site, site-based, scattered-site subsidy) or expects to have one in a reasonably short amount of time
- For all other types of Service projects including but not limited to: services only, day shelter, homelessness prevention, coordinated assessment, health care it is the date the client first began working with the project and generally received the first provision of service.

Project: \*

-- SELECT --

-- SELECT --

Emergency Shelter - Night-by-Night

All Neighbors Coalition - Inclement Weather (ES N/N)

Save

## Project start date

- Day you are enrolling them
- Should not need to change often

Intake

Good Neighbor  
10/1/2000

ClientID  
156341

Basic Client Information

Family Members

**Program Enrollment**

Pause

Cancel

HUD Program Enrollment

Project: \*

All Neighbors Coalition - Inclement Weather (ES N/N)

Household

Excerpt from the HMIS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for assistance and are not housed, who would live together in one dwelling unit if they were housed]."

<input type="checkbox"/>	Name	Sex	Age	Project Start Date	Exit Date	Case Manager
<input checked="" type="checkbox"/>	Neighbor, Good	Data not collected	25	12/05/2025	MM/DD/YYYY	Lisa Heise

## Date of engagement

- This element is required if a housing discussion occurs.

The screenshot shows the 'HUD Program Enrollment' form in the 'Intake' system. The client is 'Good Neighbor' with ID '156341' and date of birth '10/1/2000'. The project is 'All Neighbors Coalition - Inclement Weather (ES N/N)'. The form includes a 'Household' section with a definition: 'Excerpt from the HMIS Data Standards Manual: A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit (or, for persons who are not housed, who would live together in one dwelling unit if they were housed)'. Below this is a table for enrollment data.

<input type="checkbox"/>	Name	Sex*	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*	Date of Engagement
<input checked="" type="checkbox"/>	Neighbor, Good	Data not collected	25	12/05/2025	MM/DD/YYYY	Lisa Heise	Self	MM/DD/YYYY

## Disabling Condition

- How to ask the question – “Do you have any ongoing or long-lasting physical or mental health conditions that make it hard to find or keep stable housing?”
- Context is that this question might help us connect them to services and housing programs that better meet their needs depending on their answer.

The screenshot shows the 'Universal Data Assessment' form in the 'Intake' system. The client is 'Good Neighbor' with ID '156341' and date of birth '10/1/2000'. The form includes a 'Default Client's Last Assessment' section with the following fields:

- Assessment Date: 12/05/2025
- Age at Assessment: 25
- Assessment Type: Entry
- Assessor: Lisa Heise
- Program: All Neighbors Coalition - Inclement Weather (ES N/N)
- Disabling Condition: -- SELECT --

The 'Disabling Condition' dropdown menu is open, showing the following options:

- SELECT --
- Yes
- No
- Client Doesn't Know
- Client prefers not to answer
- Data Not Collected

Below the dropdown is the 'Enrollment CoC' section, which includes a text box for 'Select or enter the CoC code assigned to the project entry. Enrollment CoC will be default' and a dropdown for 'Enrollment CoC'.

## Prior Living Situation

Intake

Good Neighbor  
10/1/2000

ClientID  
156341

Basic Client Information
Family Members
Program Enrollment
Good Neighbor
New Assessment

Pause
Cancel

### Universal Data Assessment

#### Living Situation

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

Prior Living Situation: \*
-- SELECT --

Length of stay in prior living situation: \*
-- SELECT --

Approximate Date this episode of homelessness started: \*
MM/DD/YYYY

Regardless of where they stayed last night—Number of times \*  
the client has been on the streets, in ES, or SH in the past  
three years including today:
-- SELECT --

Total number of months homeless on the street, in ES, or SH \*  
in the past three years:
-- SELECT --

One "Data Element" that contains 5 questions, or pieces of information:

- 1) Prior Living Situation** → Where did the client stay last night?
- 2) Length of Time** → How long did they stay there?
- 3) Approx Date Homelessness Started** → What was the first date of this episode of homelessness?
- 4) Number of Times Homeless in 3 Years** → How many times have they experienced homelessness in the last 3 years?
- 5) Total Number of Months Homeless in 3 Years** → How many total months have they experienced homelessness in the last 3 years?

## PRIOR LIVING SITUATION

- Where did you stay last night?  
Are you experiencing literal homelessness?
- How many nights in a row did you stay there this time?
- Can you remember the last time (or most recent time) you stayed in a place that you or someone you know paid for? – lease, hotel, couch surfing, doubled up,  
Are you experiencing ongoing or episodic homelessness?
- How often do you do that? Or, between those times, where were you staying?  
How many episodes?
- In the last 3 years, would you say you've spent more or less than 12 months on the street or in shelter? If less, about how many altogether?  
Are you experiencing chronic homelessness (more than 12 months)

# Insurance

Intake

Good Neighbor

10/1/2000

ClientID

156341

Universal Data Assessment

Basic Client Information

Family Members

Program Enrollment

Good Neighbor

New Assessment

Pause

Cancel

Health Insurance

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

Default Last Insurance Status

Covered by Health Insurance: -- SELECT --

-- SELECT --

Yes

No

Client Doesn't Know

Client prefers not to answer

Data Not Collected

Type

Private

Private - Employer

Private - Individual

Reason No

-- SELECT --

-- SELECT --

-- SELECT --

Other Coverage

-- SELECT --

-- SELECT --

No

# Barriers

- If Disabling Condition is Yes, please indicate which kind of condition is present.

Assessment Active

Identified Date: 12/05/2025

Screen: HMIS Barriers

Disabling Condition: Yes

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

Save




Save & Close

## Domestic Violence Experience

- Are you here today because you're trying to get away from an unsafe situation at home?


Good Neighbor  
10/1/2000

ClientID  
156341




### Domestic Violence Assessment

If the client is a survivor of domestic violence, select Yes for Survivor of Domestic Violence, and select when the experience occurred.

Default Client's Last Assessment 

Assessment Active

Assessment Date: \* 12/05/2025 

Survivor of Domestic Violence: \* ☐ Yes  
☐ No  
☐ Client Doesn't Know  
☐ Client prefers not to answer  
☐ Data Not Collected




## Current living situation

- Where are they staying tonight – Emergency shelter

Intake


Good Neighbor  
10/1/2000


ClientID  
156341




### Current Living Situation

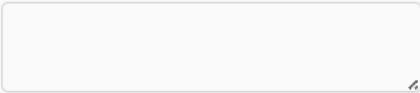
Record the Clients Current Living Situation information below. If desired record a contact by checking the Record Contact and filling out the information for the contact. Also other services can be recorded.

Information Date: \* 12/05/2025 

Enrollment: \* 12/05/2025 - All Neighbors Coalition - Inclement Weather (ES N/N) 

#### Current Living Situation Information

Current Living Situation: \* Emergency shelter, including hotel or motel paid for with emergency shelter voucher, Host Home shelter 

Location Detail: 


Record Contact: ☐

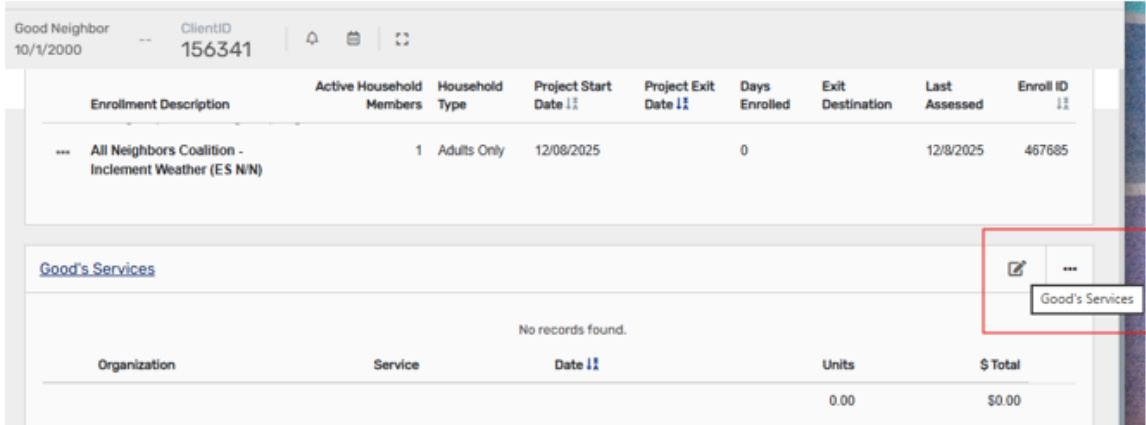
Pause Cancel

Save

## Step 4. Creating a new Bed Night

Add a new service for Bed Night – (Your Location)

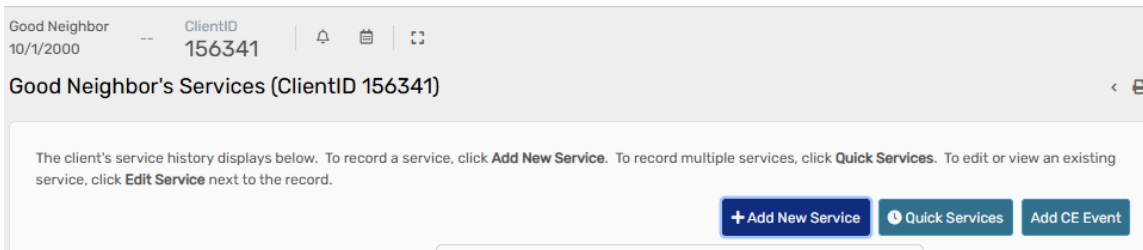
- On the Client's Dashboard in the Services Section, Click 



The screenshot shows the 'Good Neighbor' client dashboard for ClientID 156341. It features a table with columns: Enrollment Description, Active Household Members, Household Type, Project Start Date, Project Exit Date, Days Enrolled, Exit Destination, Last Assessed, and Enroll ID. A single record is shown for 'All Neighbors Coalition - Inclement Weather (ES N/N)' with 1 active household member, 'Adults Only' type, and a project start date of 12/08/2025. Below this is a section titled 'Good's Services' with a red box highlighting an edit icon and a dropdown menu. The dropdown menu is open, showing 'Good's Services'.

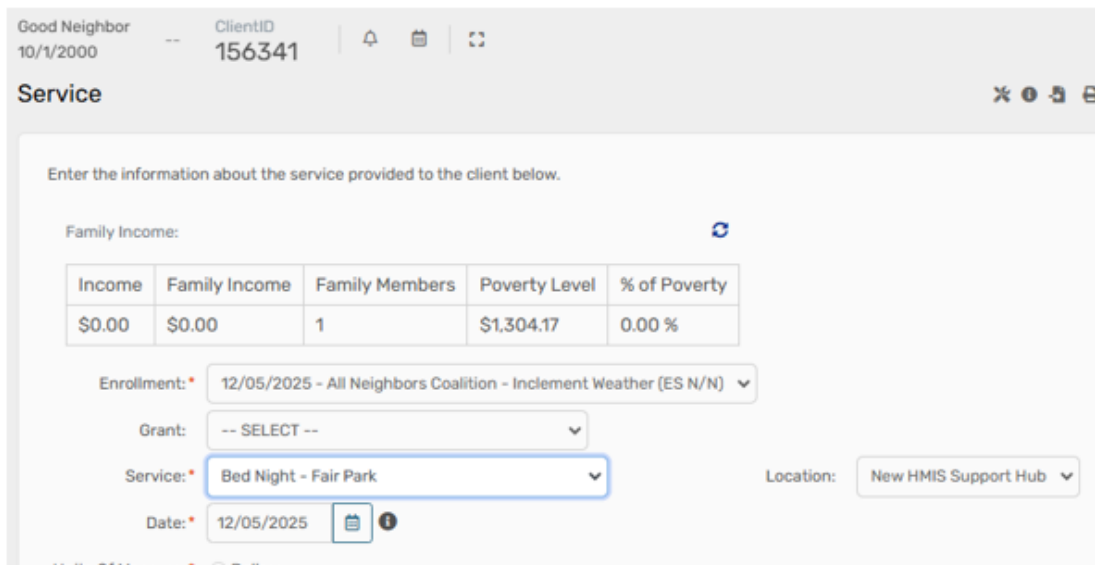
- Select

**+ Add New Service**



The screenshot shows the 'Good Neighbor's Services (ClientID 156341)' page. It includes a header with the client's name and ID, and a sub-header 'Good Neighbor's Services (ClientID 156341)'. Below the header is a message: 'The client's service history displays below. To record a service, click **Add New Service**. To record multiple services, click **Quick Services**. To edit or view an existing service, click **Edit Service** next to the record.' At the bottom right, there are three buttons: '+ Add New Service', 'Quick Services', and 'Add CE Event'.

- Choose the Client's enrollment in your IWS project
- Select "Bed Night- Your Site"
- Confirm Date



The screenshot shows the 'Service' form. It includes a header with the client's name and ID, and a sub-header 'Service'. Below the header is a message: 'Enter the information about the service provided to the client below.' The form contains several fields: 'Family Income' (with a table showing Income, Family Income, Family Members, Poverty Level, and % of Poverty), 'Enrollment' (a dropdown menu), 'Grant' (a dropdown menu), 'Service' (a dropdown menu), 'Date' (a date picker), and 'Location' (a dropdown menu). The 'Service' dropdown menu is highlighted, showing 'Bed Night - Fair Park'.

- After the service has been created, you will see the new service on their Dashboard under Services.

Good Neighbor

10/1/2000

ClientID

156341

Good's Enrollments

Pagination for Enrollments

1 result found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Project Exit Date	Days Enrolled	Exit Destination	Last Assessed	Enroll ID
<div>Active</div> <div>Emergency Shelter - Night-by-Night</div> <div> <div></div> <div>All Neighbors Coalition - Inclement Weather (ES N/N)</div> </div>								
	1	Adults Only	12/08/2025		0		12/8/2025	467685

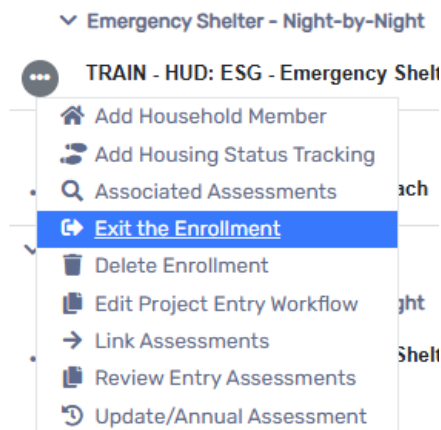
Good's Services

1 result found.

Organization	Service	Date	Units	\$ Total
<div>Today (1 Services)</div> <div> <div></div> <div></div> <div>All Neighbors Coalition</div> <div>Bed Night - Fair Park</div> <div>12/08/2025</div> <div>1.00</div> <div>\$0.00</div> </div>				

## Steps to perform an Exit (if needed)

- Select "Exit the Enrollment" via the action button (three dots).



- Next, input the exit information for the Client.

A screenshot of the 'Enrollment Exit' form in a software application. The form is titled 'HUD Program Exit' and 'Enrollment Exit'. It contains fields for 'Exit Date' (11/25/2025), 'Destination' (a dropdown menu), and 'Exit Reason' (a dropdown menu). Below these fields are 'Case Manager Assignment' (Lisa Heise) and 'End Case Assignment' (checked). There is a 'Services' section with an 'Add Quick Services' checkbox. A 'Save' button is at the bottom right. The form also includes a 'Pause' button and a 'Cancel' button on the left side.

## Project exit date

- When the enrollment is exited, the Exit Date will populate.

<input type="checkbox"/>	Name	Sex*	Age	Project Start Date	Exit Date	Case Manager ⓘ	Relationship to Head of Household*
<input checked="" type="checkbox"/>	Dawson, Alicia Roberts	Data not collected	60	11/20/2025	11/20/2025	Lisa Heise	Self



**Auto-Exits**

- If auto-exits are enabled for a program, exits will be triggered automatically when no activity is recorded for a set period.
- Our Inclement Weather enrollments will be auto exited after 180 days of no activity with an Exit Destination of "No exit interview completed".
- Please make every effort to exit the client directly, so that the exit destination is accurate.

# Data Collection Requirements

3.01 Name

3.02 Social Security  
Number

3.03 Date of Birth

3.04 Race and Ethnicity

3.07 Veteran Status

3.08 Disabling Condition

3.10 Project Start Date

3.11 Project Exit Date

3.12 Destination

3.15 Relationship to Head of Household

3.16 Enrollment CoC

3.917 Prior Living Situation

## Special notes about UDE's:

- Many of these elements comprise basic demographics about a client which are critical to an HMIS's client search functionality and ability to de-duplicate client records. Data quality is checked and reported on many basic demographic elements.
- Two of the elements are required to identify a client as chronically homeless: Disabling Condition and Prior Living Situation. Because street outreach and emergency shelter projects are critical in the identification of chronic homeless person's special attention in training should be provided to users of those project types.
- **Race and Ethnicity (3.04)** was updated in the FY2024 HMIS Data Standards to provide more inclusive and representative response options. Please review the [HMIS Data Standards Manual](#) for specific descriptions of these updated responses.
- **Project Start Date (3.10)** HMIS Leads/System Administrators should provide users additional information on Project Start Date for each project type.
  - **Emergency Shelters**–
    - **Night-by-Night** –will have a project start date and allows clients to re-enter without "exiting and restarting" for each stay.

## Common Program Specific Data Elements

Common Program Specific Data Elements are data collected by most ESG project types. The following chart indicates which elements are required for collection for each of the ESG component types. Projects funded by the ESG Program must collect data according to the chart below to generate the CSV-CAPER Report.

Data Element	Emergency Shelter Night-by-Night
4.02 Income and Sources	
4.03 Non-Cash Benefits	
4.04 Health Insurance	
4.05 Physical Disability	x
4.06 Developmental Disability	x
4.07 Chronic Health Condition	x
4.08 HIV/AIDS	x
4.09 Mental Health Disorder	x
4.10 Substance Use Disorder	x
4.11 Domestic Violence	x
4.12 Current Living Situation	x
4.13 Date of Engagement	x
4.14 Bed Night	x

## Special Data Collection Instructions

HMIS Leads/System Administrators need to be aware of the following special data collection issues that apply to ESG-funded projects and educate HMIS end users.

### Emergency Shelter

#### Night-by-Night (NBN) shelters:

- **Night-by-Night** shelters should be set up to collect all data required, however, HUD understands that often NBN shelters are not able to collect exit data. Persons who leave/disappear without completing an exit interview are to be recorded with an exit destination as: No exit interview completed.
- **Contacts:** NBN shelters must record contacts they have with each person served via *4.12 Current Living Situation*. A contact is defined as an interaction between a worker and a client designed to engage the client. Contacts may include activities such as a conversation between the shelter worker and the client about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service. A contact must be recorded anytime a client is met, including when an engagement date or *Project Start Date* is recorded on the same day.
- **Engagements:** NBN shelters are required to record engagements. Per the HMIS Data Standards and by agreement across all federal partners, an engagement date is the date when an interactive client relationship results in a deliberate client assessment or beginning of a case plan. The date of engagement should be entered into HMIS at the point when the client has been engaged by the shelter worker. This date may be on or after the *Project Start Date* and must be prior to project exit. If the client exits without becoming engaged the engagement date should be left blank. If the client was contacted on the date of engagement, a contact must also be entered for that date.

