

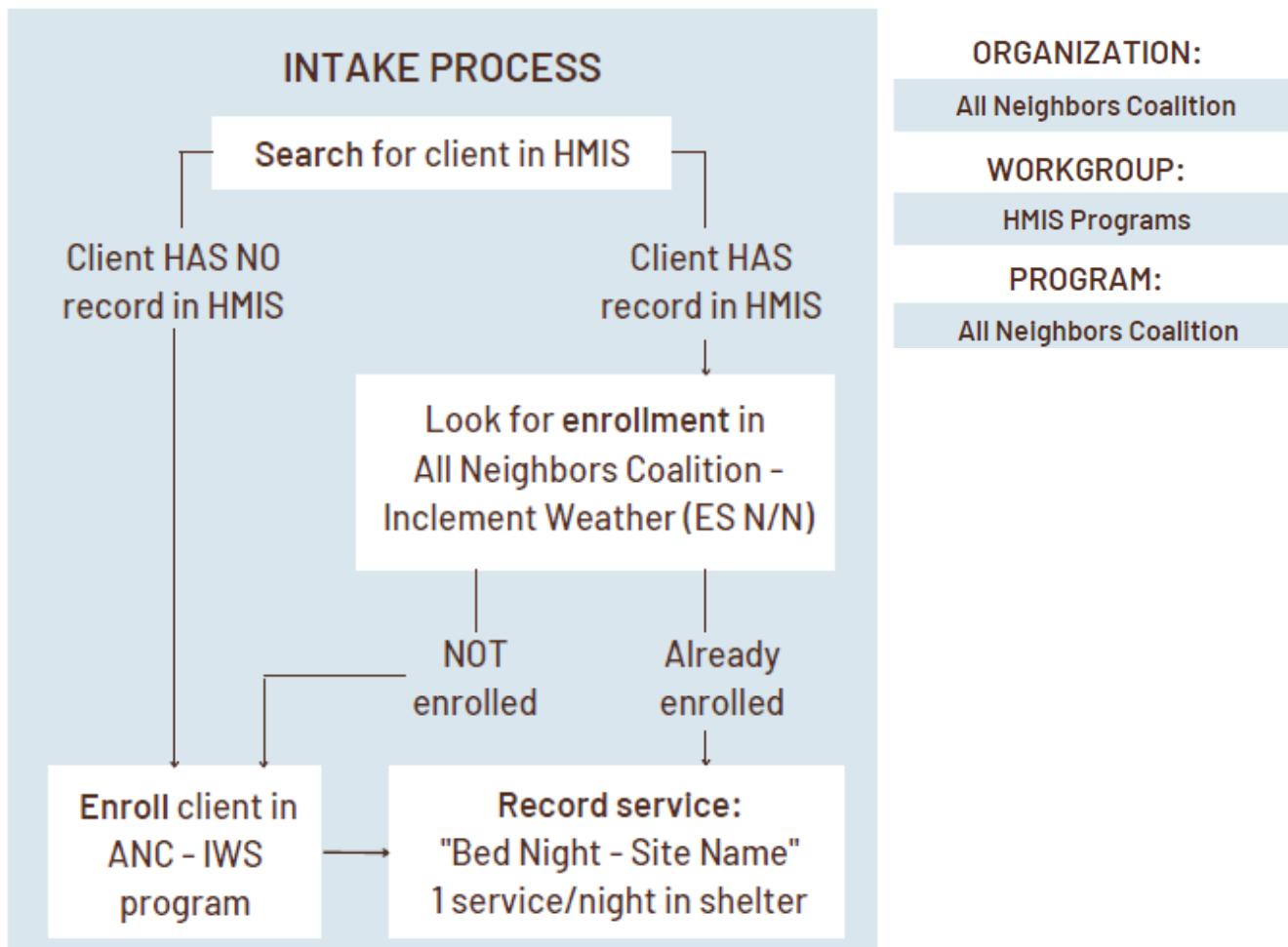


# ClientTrack HMIS Data Entry Guide for Inclement Weather

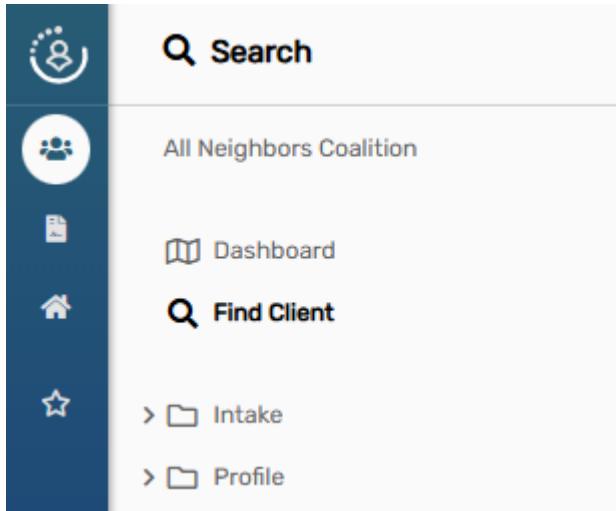
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## Inclement Weather Data Collection Process

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>



## Step 1: Search for the Client in HMIS



The screenshot shows the HMIS search interface. On the left is a vertical sidebar with the following icons and labels from top to bottom: a user icon labeled 'All Neighbors Coalition', a group icon labeled 'Dashboard', a house icon labeled 'Find Client', and a star icon with two sub-options: 'Intake' and 'Profile'. The main area is titled 'Search' with a magnifying glass icon. Below the title, the text 'All Neighbors Coalition' is displayed.

### 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.

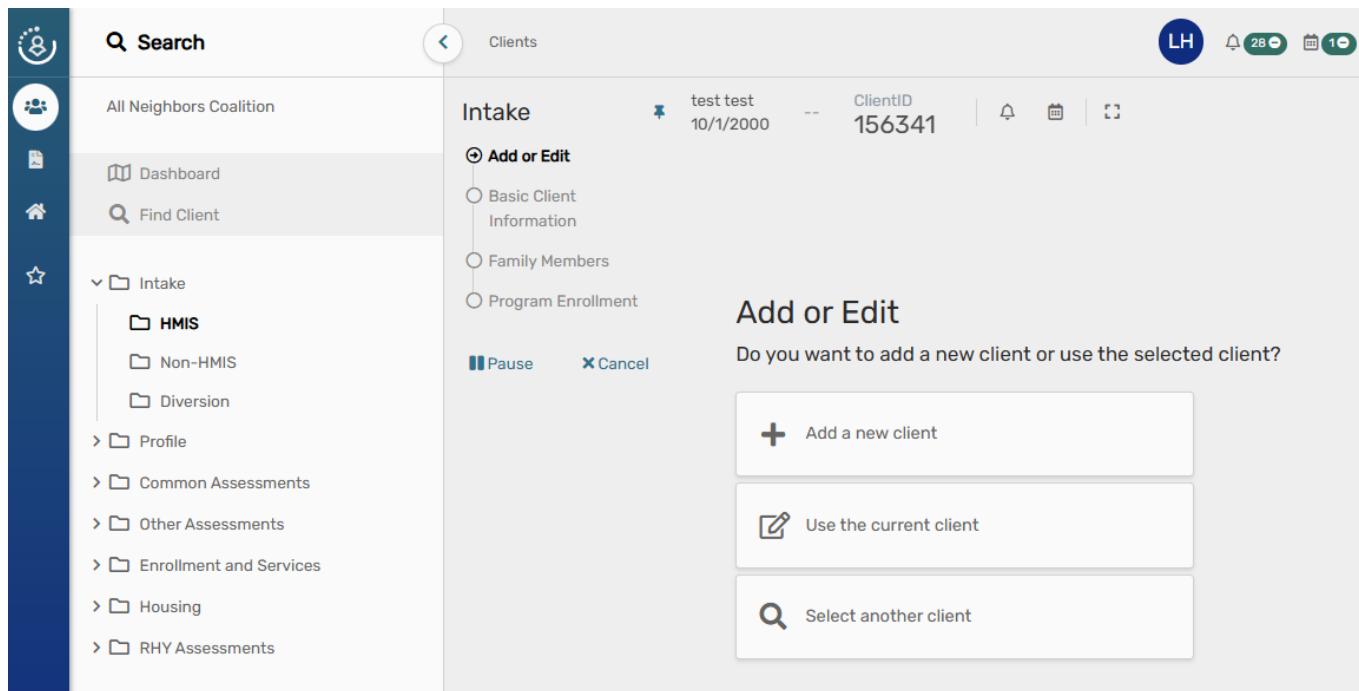
Enrollment Description	Active Household Members	Household Type	Project Start Date 	Project Exit Date 
 <a href="#"><u>Active</u></a>				
 <a href="#"><u>Emergency Shelter - Night-by-Night</u></a>				
... All Neighbors Coalition - Inclement Weather (ES N/N)	1	Adults Only	12/08/2025	

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"

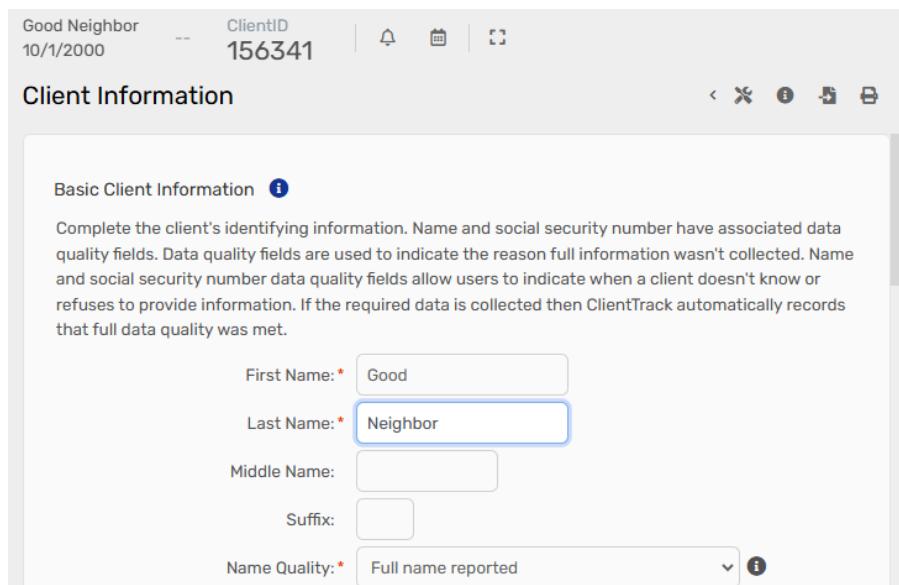
If the client's information is present, select "Use the current client"



The screenshot shows the HMIS software interface. On the left is a sidebar with icons for Home, Find Client, Intake (selected), Profile, Common Assessments, Other Assessments, Enrollment and Services, Housing, and RHY Assessments. The main area shows a list of clients under 'All Neighbors Coalition'. One client, 'Intake' with ClientID 156341, is selected. A modal dialog titled 'Add or Edit' is open, asking 'Do you want to add a new client or use the selected client?'. It has three options: 'Add a new client' (selected), 'Use the current client', and 'Select another client'.

### Client Information - Name

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



The screenshot shows the 'Basic Client Information' form. The client's name is listed as 'Good Neighbor' with ClientID 156341. The form fields include: First Name: 'Good', Last Name: 'Neighbor' (highlighted with a blue border), Middle Name: (empty), Suffix: (empty), and Name Quality: 'Full name reported'. A note states: 'Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.'

## SSN

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

### Partial SSN

Social Security Number:  -  - 3455 

SSN Quality: \*  Approximate or partial SSN reported 

Social Security Number:  000 -  00 - 3455 

SSN Quality: \*  Full SSN 

### Missing SSN

Social Security Number:  -  -  

SSN Quality: \*  Full SSN 

Client doesn't know

Client prefers not to answer

Data not collected

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: \*   

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/Latino/a  
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 ClientID 1/1/2000 9795

Basic Client Information

Family Members Program Enrollment

Pause Cancel

Client Information

Race and Ethnicity: \*

Selected: Black, African American, or African

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

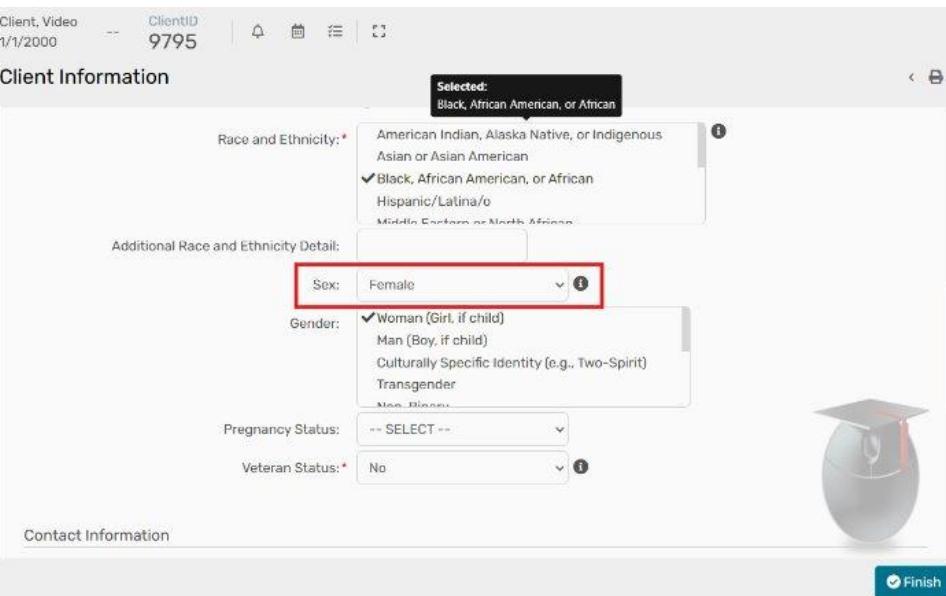
Gender: ✓ Woman (Girl, if child)  
Man (Boy, if child)  
Culturally Specific Identity (e.g., Two-Spirit)  
Transgender

Pregnancy Status: -- SELECT --

Veteran Status: \* No

Contact Information

Finish



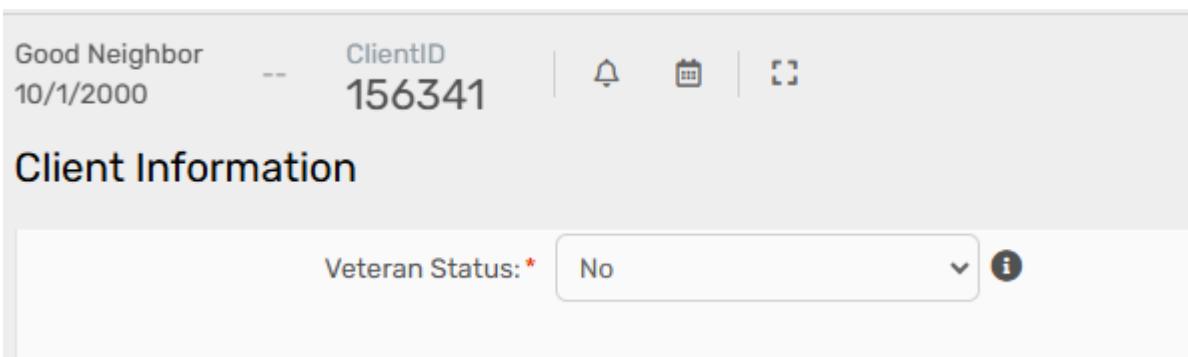
## Veteran Status

- 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 ClientID 10/1/2000 156341

Client Information

Veteran Status: \* No



## Project Selection

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

Intake      Good Neighbor      ClientID  
10/1/2000      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:
  1. 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)
  2. The client has indicated they want to be housed in this project
  3. 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: \*

Save

## Project start date

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

Intake      Good Neighbor      ClientID  
10/1/2000      156341

Basic Client Information       Family Members       Program Enrollment

Pause       Cancel

**HUD Program Enrollment**

Project: \*

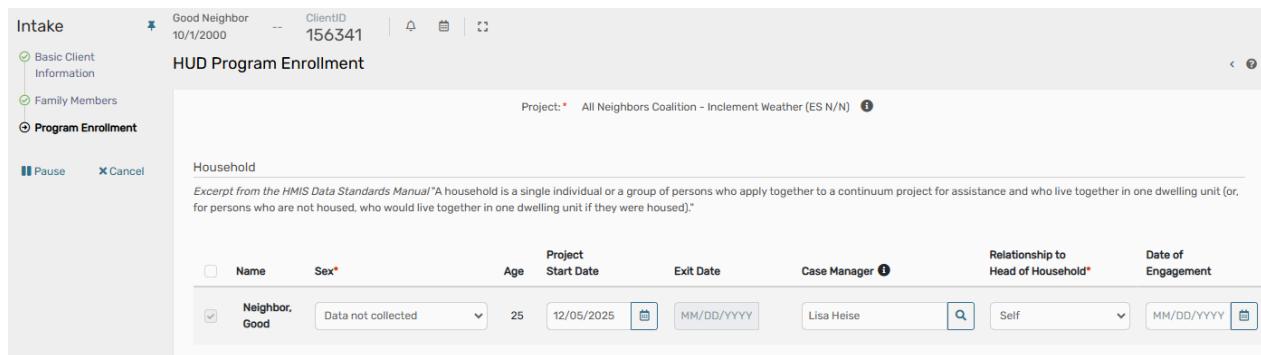
**Household**

*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 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 type="button"/>
<input checked="" type="checkbox"/>	Neighbor, Good	<input type="button" value="Data not collected"/>	25	12/05/2025 <input type="button"/>	<input type="button" value="MM/DD/YYYY"/>	Lisa Heise <input type="button"/>

## Date of engagement

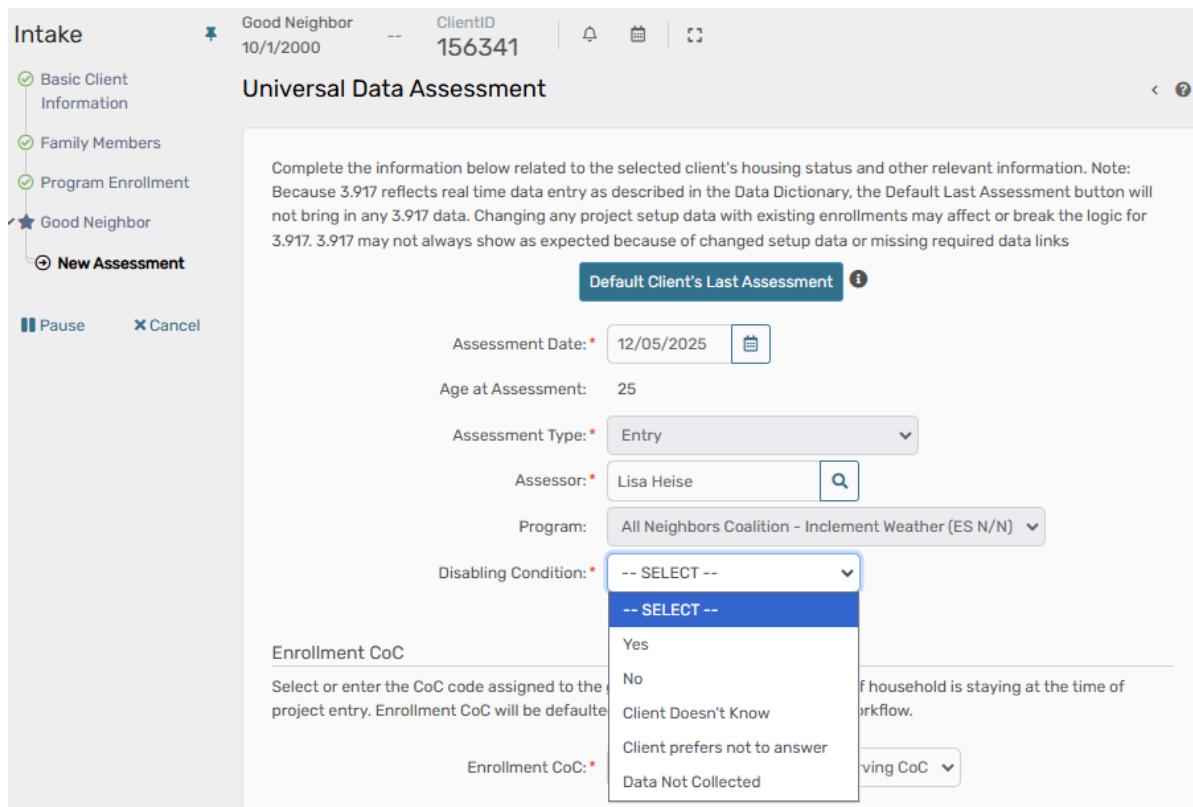
- This element is required if a housing discussion occurs.



The screenshot shows the 'Intake' section of the software with 'Good Neighbor' as the client. The 'ClientID' is 156341. The 'HUD Program Enrollment' section is open, showing a table for 'Household' entries. One entry is visible for 'Neighbor, Good' with the following details: Sex: Data not collected, Age: 25, Project Start Date: 12/05/2025, Case Manager: Lisa Heise, Relationship to Head of Household: Self, and Date of Engagement: MM/DD/YYYY (button).

## 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' section for the same client. The 'Assessment Date' is 12/05/2025. The 'Disabling Condition' dropdown is open, showing the following options: -- SELECT --, Yes, No, Client Doesn't Know, Client prefers not to answer, and Data Not Collected. A tooltip for 'No' indicates that the household is staying at the time of entry. The 'Program' dropdown is set to 'All Neighbors Coalition - Inclement Weather (ES N/N)'.

## Prior Living Situation

Intake      Good Neighbor -- 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 -- i

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

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

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 -- v

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

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

1. Where did you stay last night?
2. How many nights in a row did you stay there this time?
3. 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,
4. How often do you do that? Or, between those times, where were you staying?
5. 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 literal homelessness?

Are you experiencing ongoing or episodic homelessness?

How many episodes?

Are you experiencing chronic homelessness (more than 12 months)

## Insurance

Intake Good Neighbor ClientID 156341

Universal Data Assessment

Health Insurance

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

Covered by Health Insurance: -- SELECT --

Type: -- SELECT --

Private

Private - Employer

Private - Individual

Default Last Insurance Status: -- SELECT --

Reason No: -- SELECT --

Other Coverage: -- SELECT --

No: -- SELECT --

## Barriers

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

Assessment Active

Identified Date: \* 12/05/2025 Calendar

Screen: HMIS Barriers

Disabling Condition: Yes

Barrier	Help	Barrier Present?*	Condition is Indefinite	Explanation	Previous Barrier Details
Alcohol Use Disorder	?	No			<input checked="" type="checkbox"/> Previous Barrier <span style="border: 1px solid #ccc; padding: 2px;">Edit</span>
Chronic Health Condition	?	No			<input checked="" type="checkbox"/> Previous Barrier <span style="border: 1px solid #ccc; padding: 2px;">Edit</span>
Developmental Disability	?	Yes			<input checked="" type="checkbox"/> Previous Barrier <span style="border: 1px solid #ccc; padding: 2px;">Edit</span>
Drug Use Disorder	?	No			<input checked="" type="checkbox"/> Previous Barrier <span style="border: 1px solid #ccc; padding: 2px;">Edit</span>
HIV/AIDS	?	No			<input checked="" type="checkbox"/> Previous Barrier <span style="border: 1px solid #ccc; padding: 2px;">Edit</span>
Mental Health	?	No			<input checked="" type="checkbox"/> Previous Barrier <span style="border: 1px solid #ccc; padding: 2px;">Edit</span>
Physical Disability	?	No			<input checked="" type="checkbox"/> Previous Barrier <span style="border: 1px solid #ccc; padding: 2px;">Edit</span>

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 -- ClientID  
10/1/2000 -- 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: \*  

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 -- ClientID  
10/1/2000 -- 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: \*  

Enrollment: \*  

**Current Living Situation Information**

Current Living Situation:  

Location Detail:

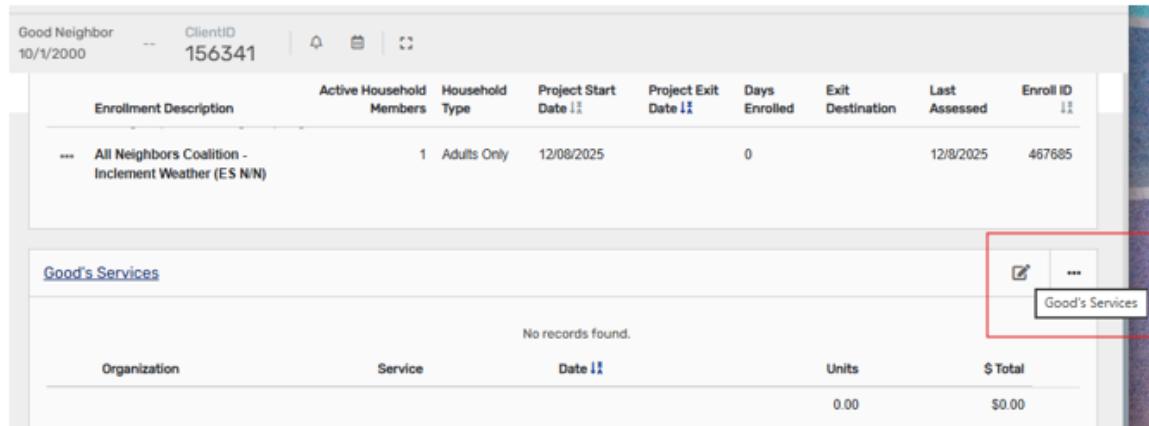
Record Contact:



## Step 4. Creating a new Bed Night

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

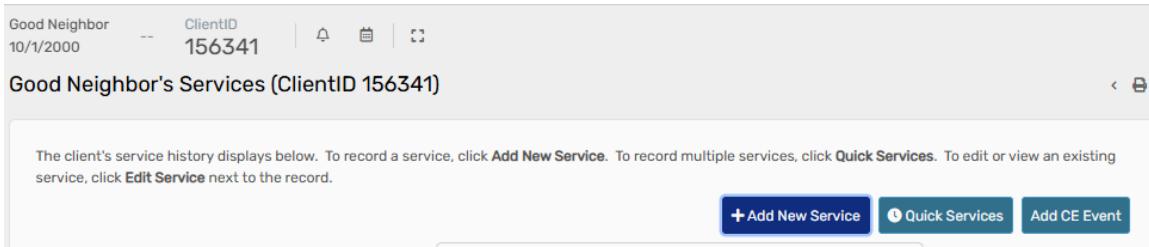
- On the Client's Dashboard in the Services Section, Click 



The screenshot shows the 'Services' section of a client dashboard. At the top, there is 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. One row is visible: 'All Neighbors Coalition - Inclement Weather (ES N/N)' with 1 Adult Only, Project Start Date 12/08/2025, and Days Enrolled 0. Below this is a section titled 'Good's Services' with a sub-section 'Good's Services'. A red box highlights the 'Good's Services' button. At the bottom, there is a table for recording services with columns: Organization, Service, Date, Units, and \$ Total. It shows 0.00 units and \$0.00 total.

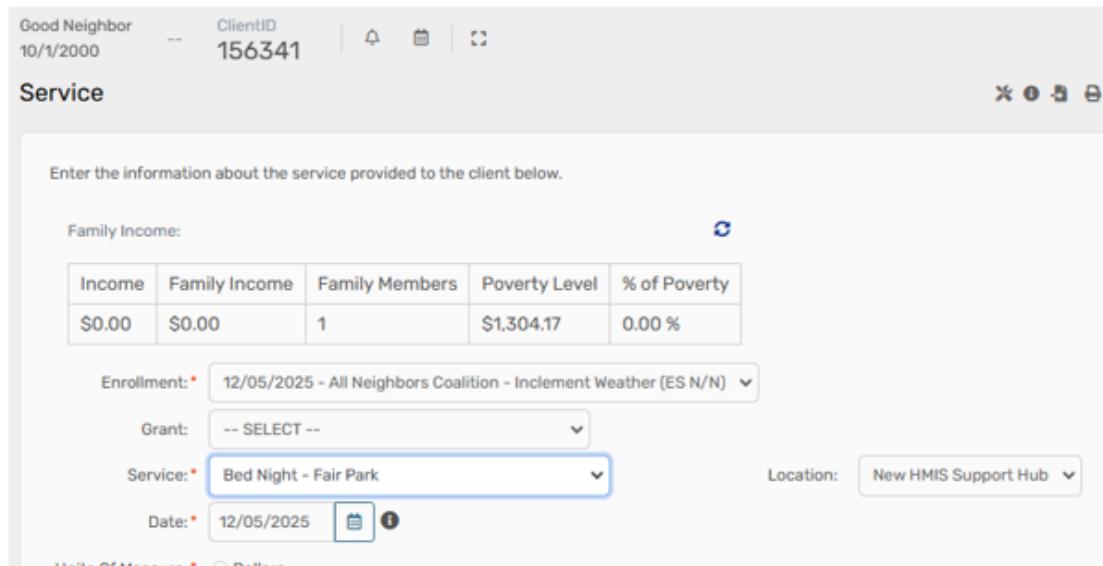
 **Add New Service**

- Select



The screenshot shows the 'Good Neighbor's Services' page for ClientID 156341. It displays 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.' Below this are three buttons: '+ Add New Service' (highlighted in red), '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' record form for a client. It includes fields for Family Income (table with columns: Income, Family Income, Family Members, Poverty Level, % of Poverty), Enrollment (dropdown: '12/05/2025 - All Neighbors Coalition - Inclement Weather [ES N/N]'), Grant (dropdown: '-- SELECT --'), Service (dropdown: 'Bed Night - Fair Park' highlighted in blue), Location (dropdown: 'New HMIS Support Hub'), and Date (dropdown: '12/05/2025'). At the bottom, there are buttons for 'Save' and 'Cancel'.

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

Good Neighbor -- ClientID  
10/1/2000 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
Emergency Shelter - Night-by-Night	1 Adults Only		12/08/2025		0		12/8/2025	467685
All Neighbors Coalition - Inclement Weather (ES N/N)								

Good's Services

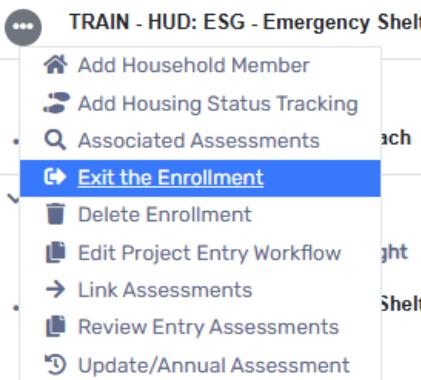
1 result found.

Organization	Service	Date	Units	\$ Total
All Neighbors Coalition	Bed Night - Fair Park	12/08/2025	1.00	\$0.00

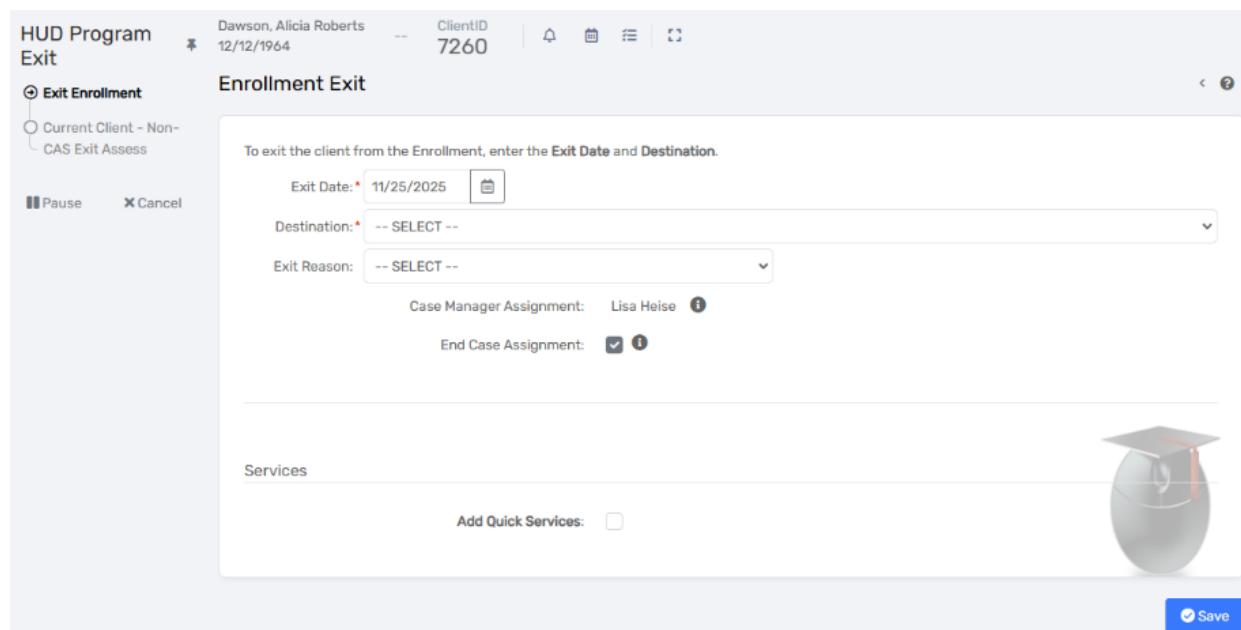
## Steps to perform an Exit (if needed)

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

▼ Emergency Shelter - Night-by-Night



- Next, input the exit information for the Client.

A screenshot of the 'HUD Program Exit' screen. The 'Enrollment Exit' tab is selected. The 'Exit Date' field is set to '11/25/2025'. The 'Destination' and 'Exit Reason' fields both show a dropdown menu with '-- SELECT --' selected. Other fields include 'Case Manager Assignment' (Lisa Heise), 'End Case Assignment' (checked), and 'Add Quick Services' (unchecked). A 'Save' button is at the bottom right.

## Project exit date

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

	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	3.10 Project Start Date
3.03 Date of Birth	3.11 Project Exit Date
3.04 Race and Ethnicity	3.12 Destination
3.07 Veteran Status	3.15 Relationship to Head of Household
3.08 Disabling Condition	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.

<b>Data Element</b>	<b>Emergency Shelter Night-by-Night</b>
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.

