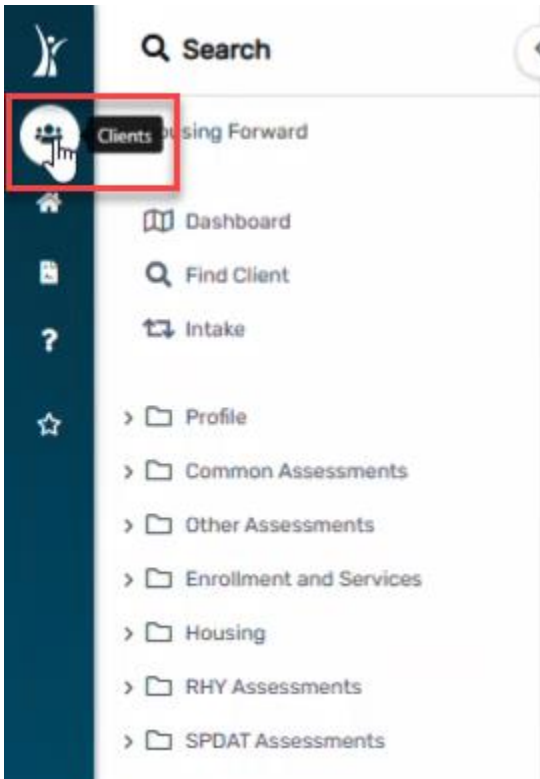


HMIS Cheat Sheet on Creating an Enrollment with Select Individuals Within the Family

To record an Entry Assessment for a client, be sure you are on the **Clients Workspace**.



1. Find your client using the **Search** or **Find Client**. (You can do this by (a) searching for the Head of Household and selecting a family member or (b) search directly for the client.)
 - a. Searching for the Head of Household and selecting a family member.

Search

Housing Forward

Find Client

Intake

Profile

Common Assessments

Other Assessments

Enrollment and Services

Housing

RHY Assessments

SPDAT Assessments

Client: Test

ClientID

1657

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.

First Name

Last Name

Middle Name

Full Name (Last, First)

Social Security Number

Birth Date

Scan Client ID

8 results found

First Name	Last Name	Middle Name	SSN	Client ID	Birth Date
Test Sam	Client		123-45-7899	2787	03/16/2008
Test	Client		5532	5532	10/04/2000
Test	Client		3331	3331	
Test	Client		000-00-0000	1657	07/12/1986

Cancel

Search

Housing Forward

Dashboard

Find Client

Intake

Profile

Common Assessments

Other Assessments

Enrollment and Services

Housing

RHY Assessments

SPDAT Assessments

Clients / Test Client's Dashboard

Client: Test

ClientID

1657

Expand

Test Client's Dashboard

Test Client's Information

Name:

Gender:

Ethnicity:

Test's Enrollments

Enrollment Description	Active Household Members	Household
Active		
Emergency Shelter		
ASC - Emergency Shelter (E/E)	1	Adults

Search Clients / Test Client's Dashboard

Housing Forward

Dashboard

Find Client

Intake

Profile

Common Assessments

Other Assessments

Enrollment and Services

Housing

RHY Assessments

SPDAT Assessments

Client Name
Client, Test

Birth Date
7/12/1986

Address

Percent Poverty

Gender
Multiple-Genders

ClientID
1657

Add Family Member

Family

Family History

Test Client
Age 36 Self

Case Notes Services Calendar

No photo

Test Son Client
Age 17 Son

Case Notes Services Calendar

b. Searching directly for client.

Search Clients / Find Client

Client, Test Son
3/18/2006

ClientID
3787

Find Client

Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.

First Name: Test

Last Name: Client

Middle Name:

Full Name (Last, First):

Social Security Number:

Birth Date: MM/DD/YYYY

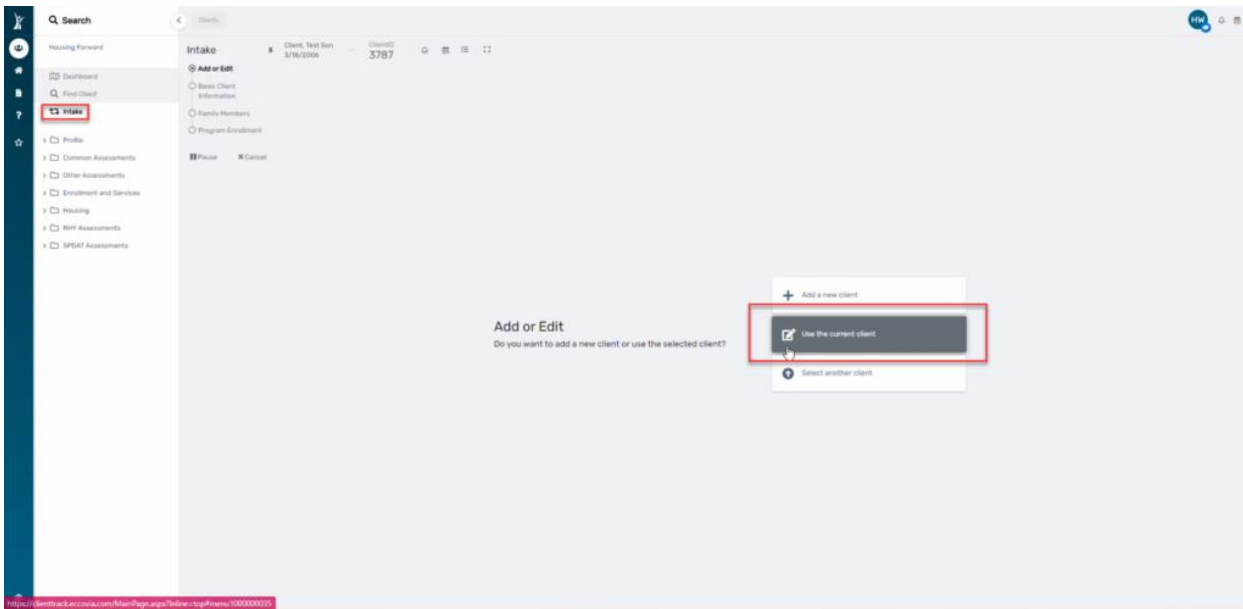
Scan Client ID:

4 results found.

First Name	Last Name	Middle Name	SSN	Client ID	Birth Date
Test Son	Client		123-45-7899	3787	03/18/2006
Test	Client			3332	10/04/2000
Test	Client			3331	
Test	Client		000-00-0000	1657	07/12/1986

Cancel

2. On the client's dashboard, click **Intake**. This will start a workflow. Click **"Use the Current Client"**



3. Continue through the pre-populated (from creation of client) client information, confirming as you go and changing if needed.

Client Information

Birth Date: 03/16/2006
 Client Age: 17
 Date of Birth Quality: Full DOB Reported
 Ethnicity: Hispanic/Latino (S)(X)
 Race: American Indian, Alaska Native, or Indigenous; Asian or Asian American; Black, African American, or African American; **Native Hawaiian or Pacific Islander**
 Gender: **Male**
 A gender other than singularly female or male (e.g., non-binary, gender fluid, agender, culturally specific gender)
 Transgender
 Address: [Field]
 Address 2: [Field]
 City, State, Zip Code: [Field] [Field] [Field]
 Email: [Field]
 Client Phone: [Field]
 Family Information: Client, Test - 2021
 Relationship to Head of Household: Son

Family Members

The selected client's family members are displayed below. You may search for existing clients to add to this family or add new clients to the database and associate them with this family.

It's important to note that family members are the people who the client is related to. Family isn't always the same as a client's household. According to HUD §2 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). [Data Manual]

This workflow will allow you to enroll all family members or select which family members you want to enroll.

2 results found (x5)

First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date*	Age	Birth Date Quality*	Gender*	SSN	SSN Quality*
Text		Client		Full name reported	07/12/1988	36	Full DOB Reported	Transgender Male	000 - 00 - 0000	
Text Son		Client		Full name reported	03/16/2006	17	Full DOB Reported	Male	123 - 45 - 7899	
				-- SELECT --	MM/DD/YYYY	N/A	-- SELECT --			-- SELECT --

NOTE: All family members will appear on this screen because they are currently connected. Simply save and close.

HUD Program Enrollment

4. **Select the Project** for which the client will be enrolled in from the dropdown box. **Check the box** next to the family member you are enrolling.

HUD Program Enrollment

Select the Project you are enrolling the client into. Clickback 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 Shelter** - 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 "rolling 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, off-site, 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.

Household

Except from the HUD Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuous project for assistance and who live together in one dwelling unit (i.e. for persons who are not housed, who would live together in one dwelling unit if they were housed)."

Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household
Client, Test Son	Multiple Genders	36	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --
Client, Test Son	Male	17	04/18/2023	MM/DD/YYYY	Haley Walton	Son

Save

Universal Data Assessment

5. Record all information for the client.

Universal Data Assessment

Complete the information below related to the selected client's housing status and other relevant information. Note: Because 3.917 reflects real time data entry as described in the Data Dictionary, the Default Last Assessment button will not bring in any 3.917 data. Changing any project setup data with existing enrollments may affect or break the logic for 3.917. 3.917 may not always show as expected because of changed setup data or missing required data links

Default Client's Last Assessment

Assessment Date: 04/18/2023

Age at Assessment: 17

Assessment Type: Entry

Assessor: Haley Walton

Program: HMIS Training - Emergency Shelter (N/N)

Disabling Condition: No

Universal Data Assessment

Disabling Condition: No

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: No

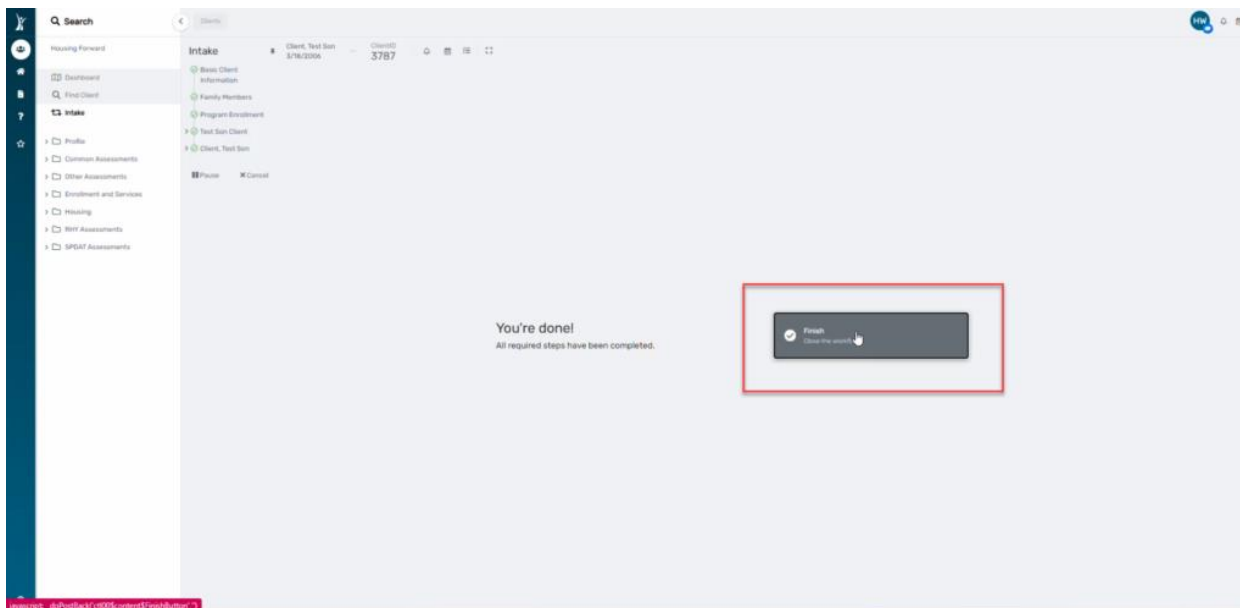
Default Last Insurance Status

Type	Status	Reason for	Other Coverage
Private	No	-- SELECT --	
Private - Employer	No	-- SELECT --	
Private - Individual	No	-- SELECT --	
Medicare	No	-- SELECT --	
Medicaid	No	-- SELECT --	
State Children's Health Insurance Program S-CHIP	No	-- SELECT --	
Military Insurance	No	-- SELECT --	
State Funded	No	-- SELECT --	
Continued Children's Health Insurance / Medicaid Program	No	-- SELECT --	
Indian Health Service (IHS)	No	-- SELECT --	
Other Public	No	-- SELECT --	
Health Insurance obtained through COBRA	No	-- SELECT --	

Save

6. Click **Save**.

7. You will come to the end of the workflow. Click **Finish**.



Confirm that you see the enrollment on the client's dashboard.

