

HMIS Beginner Training

What is HMIS

- ▣ **Homeless Management Information System**
 - **Keeps Track of Homeless Clients and their progress through the Continuum of Care**
 - **HUD Mandated**
- ▣ **ClientTrack**
 - **The Software we use for HMIS**
 - **Web Based**
 - **Limited Licenses**
 - **Complete Case Management System**

What's the Point ?

- ▣ **HMIS is supposed to show whether or not the continuum is working. It is supposed to track each individual and their travel through the continuum. Emergency Shelter >> Transitional Housing >> Permanent Supportive Housing >> Self Sufficiency.**
- ▣ **Show which demographics require more help by tracking who uses the continuum the most and what services are required. To identify need in our continuum, and later aggregate this data through the AHAR (Annual Homeless Assessment report) to congress to have them allocate funds as needed.**

Basic Terms

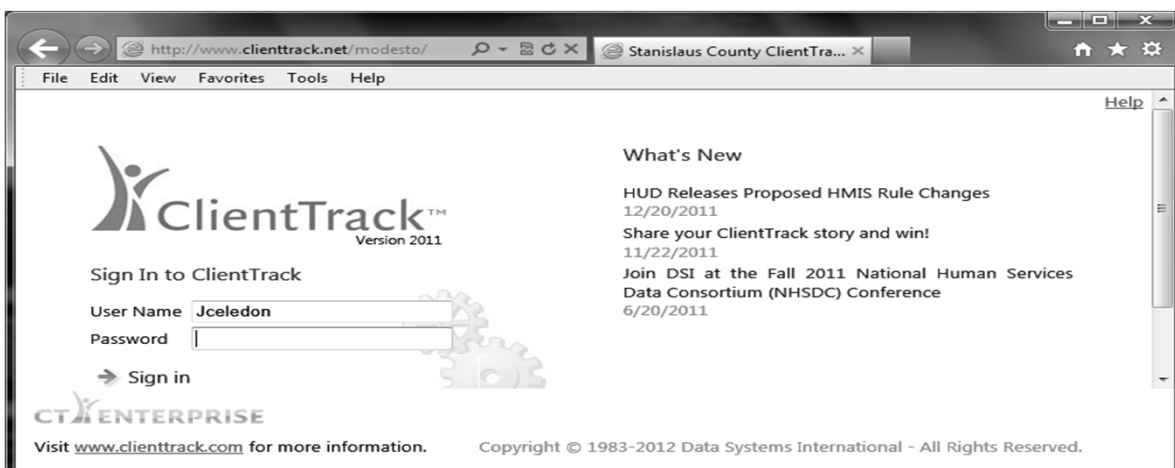
- ▣ **Assessment—A set of point in time questions that “Assess” the client’s status**
- ▣ **Enrollment—An element of ClientTrack that links together a Client, Grant/Program, and Services.**
- ▣ **Service—Something you provided to the client whether it was rental assistance, food, case management anything in your eligible activities list.**

Workflows

- ▣ **ClientTrack's way of making sure that you collect all necessary information for your grant.**
- ▣ **Will take you from client intake all the way to enrollment.**
- ▣ **When a client exits you go through another workflow which collects information required for clients leaving the program.**
- ▣ **Simplifies the client assessment process.**
- ▣ **Completing a workflow is essential for maintaining good data quality.**

Logging In

- ▣ **www.clienttrack.net/modesto**



Navigating Clienttrack

- ▣ **ClientTrack works with tabs, menu groups and menu options .**
- ▣ **Tabs change functionality, while menu groups help you narrow down what you need, and menu options are what you actually click on to perform an action.**
- ▣ **ClientTrack is Web Based so sometimes things don't load all the way through and you need to click on the link again to get it to load.**
- ▣ **The more you use it the more you will get the hang of it so timely data entry is recommended.**

The screenshot shows the ClientTrack 2011 web application interface. The browser title is "Modesto Testing - ClientTrack 2011 - Windows Internet Explorer". The page header includes the "CT ENTERPRISE" logo, a "Welcome super user" message, and navigation links for "Settings", "Help", and "Sign Out". A "CT2010" logo is in the top right corner.

The main navigation area features a horizontal tab bar with "Home", "Clients", "Housing", and "Support" tabs. A callout box labeled "Tabs" points to this bar. Below the tabs is a user profile section for "super user" with "Organization: HMIS HACS" and "Workgroup: Working2011".

The left sidebar, titled "My ClientTrack", contains a "Search Menu" field and a list of menu options: "User Dashboard", "Recent", "Bulletin Board", "Tasks", "Calendar", "Case Load", "My User Configuration", "Quick Services - Multiple Clients", "My Workflows", and "Paused Operations". A callout box labeled "Menu Options" points to this list.

At the bottom of the sidebar, there are three menu groups: "My ClientTrack", "Reports", and "Additional Tools". A callout box labeled "Menu Groups" points to these items.

The main content area displays a "Welcome" message for "HMIS HA" and "Housing of the County of Stanislaus". It includes the text "Welcome to ClientTrack" and "System for Stanislaus Housing Services Collaborative (SHSSC)". It also states "Administered by the Housing Authority County of Stanislaus". Contact information for three individuals is provided at the bottom: Whanneman (209) 557-2037, E-mail: whanneman@stancoha.org; Edon (209) 557-2086, E-mail: HMISTech@gmail.com; and Farnona (209) 525-6330, E-mail: farnona@mail.co.stanislaus.ca.us.

TABS

- ▣ **There are 4 tabs in CT(ClientTrack).**
- ▣ **Home Tab,**
 - **Your home, keep track of clients you have worked with, continue paused operations, run reports**
- ▣ **Client Tab**
 - **Find a client, add a client enroll clients anything that has to do with a client must be done here**
- ▣ **Housing Tab,**
 - **Currently not being used**
- ▣ **Support Tab**
 - **Keep Track of issues you have submitted using the help function.**

Home Tab

Will be your best friend when it comes to checking your data quality and keeping on task.

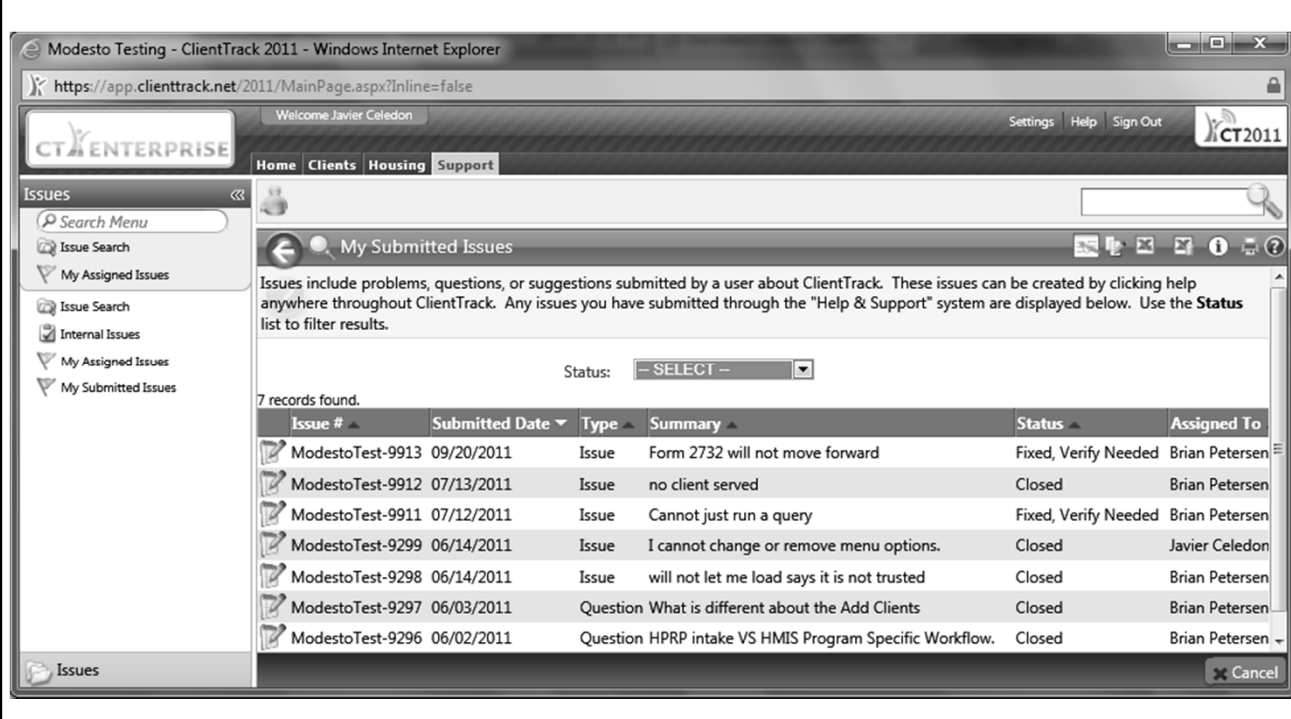
- ▣ **Gives you access to reporting tools.**
- ▣ **Current list of clients you have worked with.**
- ▣ **Quick overview of how many people you have in each of your programs.**
- ▣ **Information on how to contact those who can provide assistance.**
- ▣ **Shows you User Dashboard**

User Dashboard



Support Tab

- ▣ **Lets you submit issues to HMIS support Staff**
- ▣ **Click on the help button to report an issue or ask a question.**
- ▣ **Useful because it lets you keep track of when you submitted the issue and when it has been fixed. Makes it easier for HMIS support to escalate issues to DSI if necessary.**
- ▣ **Will email progress updates.**
- ▣ **Only for CT issues**



Modesto Testing - ClientTrack 2011 - Windows Internet Explorer
 https://app.clienttrack.net/2011/MainPage.aspx?Inline=false

Welcome Javier Celedon

Settings Help Sign Out

CT ENTERPRISE

Home Clients Housing Support

Issues

Search Menu

Issue Search

My Assigned Issues

Issue Search

Internal Issues

My Assigned Issues

My Submitted Issues

My Submitted Issues

Issues include problems, questions, or suggestions submitted by a user about ClientTrack. These issues can be created by clicking help anywhere throughout ClientTrack. Any issues you have submitted through the "Help & Support" system are displayed below. Use the **Status** list to filter results.

Status: -- SELECT --

7 records found.

Issue #	Submitted Date	Type	Summary	Status	Assigned To
ModestoTest-9913	09/20/2011	Issue	Form 2732 will not move forward	Fixed, Verify Needed	Brian Petersen
ModestoTest-9912	07/13/2011	Issue	no client served	Closed	Brian Petersen
ModestoTest-9911	07/12/2011	Issue	Cannot just run a query	Fixed, Verify Needed	Brian Petersen
ModestoTest-9299	06/14/2011	Issue	I cannot change or remove menu options.	Closed	Javier Celedon
ModestoTest-9298	06/14/2011	Issue	will not let me load says it is not trusted	Closed	Brian Petersen
ModestoTest-9297	06/03/2011	Question	What is different about the Add Clients	Closed	Brian Petersen
ModestoTest-9296	06/02/2011	Question	HPRP intake VS HMIS Program Specific Workflow.	Closed	Brian Petersen

Issues

Cancel

Client Tab

- ▣ Gives you access to
 - Client dashboard
 - Case notes,
 - Client information
 - Workflows
 - Services
 - Assessments
 - Enrollments
 - Follow up
 - Client family
 - Anything that has to do with a client

Client Dashboard

- ▣ **The Client Dashboard gives you an important overview of your client.**
 - Shows basic information such as name, birth date, age whether they have a disabling condition or if they are a veteran.
 - Show important enrollment information
 - Shows service information
 - If you want it will even show you a picture of your client(provided you uploaded one to CT)
- ▣ **Also provides you with quick links to any of those sections for action.**

Client Dashboard

The screenshot displays the Client Dashboard for John Lennon in the ClientTrack 2011 system. The interface includes a navigation menu on the left, a main content area with client details, a photo, enrollment history, and service records.

Client Information:

- Name: Lennon, John
- Birth Date: 10/9/1940
- Age: 71
- Gender: Male
- Married?: Married & living w/spouse
- Education: Nursery School to 4th Grade
- Veteran: No
- Disabling: No
- Ethnicity: Non Hispanic/Latino
- Race: White

John's Enrollments:

Case Name	Enrollment	Members	Enroll Date	Exit Date
Lennon, John	HOWPA - HPRP	1	12/09/2011	
Lennon, John	STANCO TEST SHP - STANCO SHP TEST	1	11/14/2011	
Lennon, John	HALOS - SCAP	1	11/14/2011	
Lennon, John	TEST TSA Grant - TEST TSA	1	10/05/2011	
Lennon, John	We Care Emergency Shelter	2	10/04/2011	
Lennon, John	HPRP-Modesto - HPRP	1	09/02/2011	
Lennon, John	HALO3 - SCAP	1	09/02/2011	
Lennon, John	HPRP-Turlock - HPRP	1	07/07/2011	
Lennon, John	HPRP-02-Children's Crisis Cent - HPRP	2	06/14/2011	
Lennon, John	HPRP-Modesto - HPRP	1	06/14/2011	08/16/2011

John's Services:

Date	Service	Units	\$ Total	Organization
12/09/2011	Food	1.00	\$0.00	HMIS HACCS
12/01/2011	Food	1.00	\$0.00	HMIS HACCS
12/01/2011	Health Care	1.00	\$0.00	HMIS HACCS

Workflows & Grants

- ▣ **There are a few different grant types in our continuum, each with different reporting guidelines.**
- ▣ **SHP, CDBG, ESG, HOPWA, HPRP, VA-GPD**
- ▣ **While all programs collect Universal Data, certain programs also collect Program Specific Data.**
- ▣ **Using the wrong workflow will result in getting inaccurate data into the system.**

ESG Grants

- ▣ **Emergency Shelter/Solution Grants**
- ▣ **Your agency is either a sub-grantee to the city of Modesto or Stanislaus County.**
- ▣ **Grants End each Year, in some cases it is possible to extend them for up to 2 years.**
- ▣ **Must exit all stayers on 6/30 and reenter them on 7/1.**
- ▣ **Only Universal Data Required**

HPRP Grants

- ▣ **Homeless Prevention Rapid Rehousing**
- ▣ **Program Specific Data**
- ▣ **Requires Services to be recorded**
- ▣ **Quarterly Performance Reports and Annual Performance Reports means that data must be constantly entered to be up to date in case the city or County need to run Reports.**

SHP Grants

- ▣ **Supportive Housing Program grants are what agencies usually refer to as HUD Grants.**
- ▣ **Do not end each year like ESG**
- ▣ **Can continue as long as they are renewed. You can have long term stayers especially if you deal with Permanent Supportive Housing**
- ▣ **Require Program Specific Data in addition to Universal Data**

Data Collected

- ▣ **Depending on what grant you run the information you need to collect is different.**
- ▣ **ESG CDBG HOPWA PATH VA-GPD all require Universal Data**
- ▣ **SHP and HPRP require Program Specific Data**
- ▣ **HPRP also requires Service Data(tracking direct services provided to clients).**

Universal Data

- ▣ **Name**
- ▣ **DOB**
- ▣ **Gender**
- ▣ **veteran status**
- ▣ **Disability Status**
- ▣ **Housing Status**
- ▣ **Residence prior to program entry**
- ▣ **Zip code of last permanent address**
- ▣ **Social Security Number**
- ▣ **Ethnicity Race**
- ▣ **Program Entry/Exit Dates**

Program Specific Data

- ▣ **Income and sources**
- ▣ **Non-Cash Benefits**
- ▣ **Physical Disability**
- ▣ **Developmental Disability**
- ▣ **Chronic health Condition**
- ▣ **HIV/AIDS**
- ▣ **Mental health**
- ▣ **Substance Abuse**
- ▣ **Destination**
- ▣ **Date of Contact**
- ▣ **Date of engagement**
- ▣ **Financial Services provided (HPRP)**
- ▣ **Housing relocation & stabilization services(HPRP)**
- ▣ **Optional Data Elements**

Navigation Example

- ▣ **What do you want to do?**
 - **Enroll a client in ESG grant.**
- ▣ **How do you do it?**
 - **Log in to Client Track,-- You are greeted by the user dashboard on the Home Tab.**
 - **Click on the Clients Tab-- Everything changes you are now greeted by the user dashboard displaying the last client you worked with.**
 - **Click on the ESG Menu Group-- This bring up the ESG Intake and ESG Exit Menu options**
 - **Click ESG Intake-- Takes you through all the assessments, and the enrollment screen so you can enroll the new client.**

Data Quality

- ▣ **For the data to be useful we must have excellent data quality.**
- ▣ **“Data Quality” is the number of “Missing” values and “Don’t Know” or “refused” and their comparison to the number of clients**
- ▣ **Excellent data quality means accurate reports.**

Timely Data Entry

- ▣ **The longer you wait to input data into HMIS the more likely things can go wrong.**
- ▣ **Missing data becomes harder to acquire**
- ▣ **You forget how to use the system**
- ▣ **Timely Data Entry = Excellent Data Quality**

Intake Forms

- ▣ **Intake forms are provided for those that need them. They are NOT required; However, they will make your life a lot easier**
- ▣ **Speeds up data entry time, reduces errors and helps keep track of when a client was input and who processed it.**
- ▣ **We will have a demonstration of this later.**

Oversight by Management

- ▣ **Every month during the security audit the HMIS Technician delivers usage and login history reports to management**
- ▣ **Reports cover**
 - **Number of new clients**
 - **Number of new enrollments**
 - **Number of clients updated**
 - **Your login history namely number of times you logged on but at management's request we can also provide detailed ones including times and dates of log-in and log out.**

Services

- ▣ **Recording services is REQUIRED for HPRP, and optional for ESG and SHP programs for now.**
- ▣ **This means any time you give a client a service meaning case management, rental assistance, food, transportation, any eligible activity you must record it in HMIS.**
- ▣ **Even though service tracking is not currently required for anyone not doing HPRP it would be advisable to collect this information as it would give you a better idea of what happened with a client during their stay.**

Chronically Homeless

- ▣ **IN GENERAL.—The term 'chronically homeless' means, with respect to an individual or family, that the individual or family—**
 - **(i) is homeless and lives or resides in a place not meant for human habitation, a safe haven, or in an emergency shelter;**
 - **(ii) has been homeless and living or residing in a place not meant for human habitation, a safe haven, or in an emergency shelter continuously for at least 1 year or on at least 4 separate occasions in the last 3 years; and**
 - **(iii) has an adult head of household (or a minor head of household if no adult is present in the household) with a diagnosable substance use disorder, serious mental illness, developmental disability (as defined in section 102 of the Developmental Disabilities Assistance and Bill of Rights Act of 2000 (42 U.S.C. 15002)), post traumatic stress disorder, cognitive impairments resulting from a brain injury, or chronic physical illness or disability, including the co-occurrence of 2 or more of those conditions.**

Resources

- ▣ **If you have any question you have access to all training materials provided at www.stancoha.org just click on the HMIS link on the front page**
- ▣ **You can always contact me at jceledon@stancoha.org and I will try to get back to you as soon as possible.**
- ▣ **On ClientTrack itself you can click the Help button on the top right and submit an issue or look at the user manual.**

Forgotten Password

- ▣ **You get 6 tries to log in, if you get locked out you will have to wait 2 hours to try again.**
- ▣ **Make sure that your username is correct First initial Last Name, e.g. Javier Celedon = Jceledon**
- ▣ **Make sure you are at the right url, www.clienttrack.net/modesto**
- ▣ **If you are still having problems Email me and I can reset your password**

Issues and Concerns

- ▣ **If you are having problems with ClientTrack please send me an issue through the Support Tab**
- ▣ **If you are having a non CT issue please email me and I will get back to you ASAP**
- ▣ **If you have a Housing Authority PC and it needs maintenance please fill out work order and send me an email.**

Common ClientTrack Issues

- ▣ **Clienttrack is web-based and that makes it prone to a few common issues. Listed below are the most common and their solution**
 - **Page won't load– click link again, if no success log out then try again.**
 - **Missing data in reports– must relink clients to information (Advanced user Training)**

Contacting Me

- ▣ **Email is ALWAYS the best way to reach me.**
- ▣ **All email accounts associated with HMIS are tied to my personal cell phone which updates every 10 minutes**
- ▣ **I provide on-site support to all participating agencies having any sort of issue with HMIS so I am not always at my desk**
- ▣ **If you do decide to call please follow up with an email in case am not able to check my voicemail.**
- ▣ **My schedule changes each week depending on what I need to do, but if you will email me I can usually get back to you before 5pm.**

Questions??