

Emergency Shelter HMIS Workflow

All clients staying in shelter funded through HUD's Emergency Solutions Grants (ESG) must be entered in HMIS by creating enrollment records in your Shelter program in Clarity and recording bed stays.

- 1.) Search for your client in Clarity
- 2.) If client is in the system (has an existing profile), enroll in your program. If not, create a new profile. For clients who are new to your shelter or returning after a previous exit:
 - a. Program Entry Date is the same date as date of first night stay
 - b. If you have not received consent at this point, mark the record "Private" on the privacy page. Clients who do not wish you have any identified data in HMIS can be entered anonymously (see instructions on page 2).
 - c. Depending on the shelter guest, there may be limited data collected at this point and therefore "Data Not Collected" is a valid response on some Program Enrollment screen questions.
- 3.) On the Program Enrollment Screen, the question "Date of Engagement" field should be left blank until an "interactive client relationship results in a deliberate client assessment or beginning of a case plan." (See the [ESG Program HMIS Manual](#) for complete guidance)
- 4.) Record a Contact Service using *Contact: Staying on Streets, ES or SH*. The "Service Start Date" and "Service End Date" should be the same as the Project Entry Date. This records the first contact service for the client.
- 5.) To determine when other Contacts should be recorded during a client's enrollment, follow HUD Guidance: *Night-by-Night shelters should only record a Contact if the interaction between the shelter personnel and client goes beyond a basic provision of shelter services. A Contact for emergency shelter does not include activities of daily sheltering (e.g. bed registration, request for personal care items, dinner sign-up, meals, etc.), nor should it be redundant with data element 4.14 Bed-Night Date.*
- 6.) Whenever applicable, staff should update the Program Enrollment Screen if they are able to capture more client information/demographics (changing "data not collected" fields to other accurate responses).
- 7.) When the client has become fully engaged, users will update the Program **Enrollment Screen** with more complete data and enter a date in the Date of Engagement field. **Elements where "data not collected" was chosen should be updated with valid answer choices.**
- 8.) Status Update Assessment: As appropriate, complete program status update assessments to capture any **changes** to disability types, income, benefits, or health insurance that occur while the client is enrolled in your program.
- 9.) Exit: When a client is ready to Exit the Shelter Program, fill out a Program Exit Screen. (Depending on your shelter, the software will automatically exit clients after a certain number of days without a bed stay or contact – typically 90 or 120 days.)

Entering Non-Identifiable Client Records:

Important: Shelter programs need to keep track of the non-identified client and alias information in order to not create duplicate records and to know which record to return to for updating. Once you obtain client consent, you should update these records by turning off the “Private” setting or updating with identifiable data as the relationship with your client evolves.

Types of naming conventions:

First Name = Oooooo, Last Name = Identifying Characteristic (e.g. Redhat, WhiteBeard, etc.)

Name Data Quality Field is answered as “Partial, Code or Street Name Reported”

Use the Location tab (only visible to your agency) to list a location where your client frequents during the day or night.

You must be mindful of sharing this information with colleagues in order to prevent duplicate records from your agency for the same client in HMIS.

Automatic Exit within specified number of days without contact

Planning and Development had turned on the auto exit function for Street Outreach and Emergency Shelter projects. This eliminates the possibility that a client who is no longer active in the program remains enrolled – they are automatically exited from the program if there is no activity within the specified time period (the ‘End Date’ will match the end date of the last active service). This removes these clients from the staff member’s caseload. Assigned staff will receive email and Clarity messages when automatic exits occur. The assigned staff should review the exit page to fill in any known information and save (to update) the exit record.

HUD Policy and Guidance for Emergency Shelters

ESG Program HMIS Manual: <https://www.hudexchange.info/resources/documents/ESG-Program-HMIS-Manual.pdf>

How to enter anonymous client records

- **Social Security Number**
 - Enter all 0’s
 - For SSN Quality, choose “Client Refused”

- **Client Name Fields**
 - Enter series of letter “x” as last name (Xxxxx)
 - Enter series of letter “o” as first name (Oooooo)
 - “Partial, street name, or code name reported” for Name DQ
 - After saving, replace Unique ID “A2343Y49” in Last Name field and save changes

- **Date of Birth**
 - Enter only the year the person was born
 - Eg. 1/1/1976 instead of 3/17/1976