

Emergency Shelter HMIS Workflow

All clients staying in shelter funded through ESG funds must be entered into the project by enrolling them in your Shelter program in Clarity.

- 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, create a record using non-identifiable alias information in profile fields. (See the slide on page 2 on how to create an anonymous record)
 - c. There may be limited data collected at this point and "Data Not Collected" is a valid response on some Program Enrollment Screen questions.
- 3.) On the Program Enrollment Screen, the question "Client Has Become Engaged" should be "No" 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: Service setting, residential*. 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.) Each time the project has contact with client, a Contact Service should be provided with the date the contact took place. You can record multiple contacts for a client on any given 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 select "Yes" for "*Client Has Been Engaged*." This will prompt the User to enter a Date of Engagement. **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 may 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 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.

HUD does not measure data quality for night by night Emergency Shelter data until the Date of Engagement. The assumption is that as you build your relationship, you can obtain better data and update HMIS accordingly. Reporting for ES projects includes the ESG CAPER (similar to an APR) and quarterly budget numbers. Data from Shelter projects also informs the System Performance Measure reporting for our CoC.

Automatic Exit within specified number of days without contact

Planning and Development had turned on auto exit 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 and also increases data accuracy.

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 (Xxxxxx)
 - 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