

# Stanislaus County HMIS

## HMIS New User Quick Reference Guide

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*A quick reference guide to navigating ClientTrack v.24*

*October 2024*

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## Table of Contents

HMIS Key Terms and Concepts _____	3
Continuum of Care Acronym List _____	3
Key Terms _____	5
Grant Number Convention _____	7
Stanislaus HMIS Forms, Documents, and Links _____	8
Resources _____	9
HMIS Basic Navigation _____	10
HMIS Navigation Icons _____	10
Logging in _____	11
Home Dashboard _____	11
Client Dashboard _____	12
Create and Enter an Enrollment _____	13
Add a Family Member _____	16
Add a Current Living Situation (CLS) _____	18
During Program Enrollment Update & Annual Assessments _____	20
Coordinated Read Only Access _____	21
Pause Your Workflow _____	22
Report Issues _____	23
View and Respond to Issues _____	24
Add Services _____	26
Stanislaus County HMIS Client Informed Consent and Release of Information _____	28
Stanislaus County HMIS Client Denial of HMIS Consent _____	31
Stanislaus County HMIS Client Revocation of HMIS Consent _____	32
Stanislaus County HMIS Client Privacy Rights _____	33
Stanislaus County HMIS Consumer Notice _____	34

## HMIS Key Terms and Concepts

### Continuum of Care Acronym List

AH	Affordable Housing
AHAR	Annual Homeless Assessment Report
AIDS	Acquired Immune Deficiency Syndrome
AMI	Area (Annual) Median Income
APR	Annual Performance Report
ARD	Annual Renewal Demand
ARP	American Rescue Plan
BCP	Basic Center Program
BNL	By Name List
CAPER	Consolidated Annual Performance and Evaluation Report
CDBG	Community Development Block Grant
CE	Coordinated Entry
CES	Coordinated Entry System
CH	Chronic Homeless
CHO	Contributing HMIS Organization
CLS	Current Living Situation
CM	Case Management
COBRA	Consolidated Omnibus Budget Reconciliation Act (Continuation of health coverage)
CoC	Continuum of Care
CPS	Child Protective Services
CRS	Contract Residential Services
CSL	Community Service Learning
CSV	Comma-Separated Values
DOB	Date of Birth
DOJ	Department of Justice
DQ	Data Quality
DV	Domestic Violence
E/E	Entry/Exit Shelter
EBT	Electronic Benefits Transfer
EHV	Emergency Housing Voucher
ES	Emergency Shelter
ESG	Emergency Solutions Grants
ESG – RUSH	Emergency Solutions Grant – Rapid Unsheltered Survivor Housing
ESG – CV	Emergency Solutions Grant – CARES Act
FAQ's	Frequently Asked Questions
FMR	Fair Market Rent
FY	Fiscal Year
GA	General Assistance
GED	General Education Development Test
GPD	Grant Per Diem
HCHV	Health Care of Homeless Veterans

HCV	Housing Choice Voucher
HEARTH	Homeless Emergency and Rapid Transition to Housing
HHS	Department of Health and Human Services
HIC	Housing Inventory Chart
HIV	Human Immunodeficiency Virus
HIPPA	Health Insurance Portability and Accountability Act of 1996
HMIS	Homeless Management Information Systems
HoH	Head of Household
HOPWA	Housing Opportunities for Persons with AIDS
HP	Homeless Prevention
HSV	Housing Stability Voucher
HUD	(U.S. Dept. of) Housing and Urban Development
LSA	Longitudinal Systems Analysis
MGH	Maternity Group Homes for Parenting Youth
NbN	Night by Night Shelter
NOFA	Notice of Funding Availability
NOFO	Notice of Funding Opportunity
OMB	Office of Management Budget
OTH	Other Than Honorable Discharge Conditions
PATH	Projects for Assistance in Transition from Homelessness
PDDE	Project Descriptor Data Elements
PH	Permanent Housing
PHA	Public Housing Agency
PIH	Public and Indian Housing
PII	Personally Identifiable Information
PIT	Point In Time
PKI	Public Key Infrastructure
PPI	Personal Protected Information
PSH	Permanent Supportive Housing
QPR	Quarterly Performance Report
RHY	Runaway and Homeless Youth Program
RFP	Request for Proposal
ROI	Release of Information
RRH	Rapid Re-Housing
S+C	Shelter Plus Care
SA	Substance Abuse
SAMHSA	Substance Abuse and Mental Health Administration
SH	Safe Haven
SHP	Supportive Housing Program (includes S+C, SPC and SRO)
SNAP	Special Needs Assistance Programs
SNAPS	Supplemental Nutrition Assistance Program (food stamps)
SO	Street Outreach
SOAR	SSI/SSDI Outreach, Access, and Recovery Program
SPM	System Performance Measures
SRO	Single Room Occupancy
SSDI	Social Security Disability Income

SSI	Supplemental Security Income
SSN	Social Security Number
SSO	Supportive Services Only
SSVF	Supportive Services for Veteran Families Program
STRMU	Short-Term Rent, Mortgagee and Utility
Super NOFA	Super (Consolidated) Notice of Funding Availability
TA	Technical Assistance
TANF	Temporary Assistance to Needy Families
TAY	Transitional Age Youth
TBRA	Tenant Based Rental Assistance
TFA	Temporary Financial Assistance
TH	Transitional Housing
TLP	Transitional Living Program
VA	Department of Veterans Affairs
VAMC	Department of Veterans Affairs Medical Center
VASH	HUD-VA Supportive Housing Program
VAWA	Violence Against Women Act
VI-SPDAT	Vulnerability Index – Service Prioritization Decision Assistance Tool
TAY-VI-SPDAT	Transitional Age Youth Vulnerability Index – Service Prioritization Decision Assistance Tool
VSP	Victim Service Provider
WIC	Special Supplemental Nutrition Program for Women, Infants, and Children
XML	Extensible Markup Language
YHDP	Youth Homeless Demonstration Program

## Key Terms

<b>Action Button</b>	A clickable icon, usually appearing left of an information display in ClientTrack. The icon allows the User to select it and generate a drop-down list of options for that display.
<b>Assessments</b>	Are a set of questions that represent a client’s status at a point-in-time. Snapshots of a client’s situation, including education, financial, health, and employment issues and barriers to client success. Unlike basic client information, such as name, address, and family information, assessments track client data that varies over time.
<b>Client</b>	Any person whose data is being captured or could potentially be captured by ClientTrack. Other family and non-family members and information can be collected but each non-Client added must have a Relationship with a Client in ClientTrack.
<b>ClientTrack</b>	Web-based software used to collect, track, and measure the outcomes for clients served.
<b>Continuum of Care (CoC) CA-510 Turlock, Modesto/Stanislaus County</b>	The Continuum of Care (CoC) is designed to promote a community-wide commitment to ending homelessness. The CoC provides funding for efforts by our non-profit partners and state/local government to quickly re-house

	individuals and families while minimizing the trauma caused to people experiencing homelessness. The CoC promotes access to and utilization of mainstream programs and seeks to optimize self-sufficiency among people experiencing homelessness.
<b>Continuum Grant</b>	Also referred to as a Funding Source, Grants fund Projects and usually have data collection and reporting requirements associated with them. Data associated with these Grants are recorded and tracked in your community's HMIS environment.
<b>Continuum Project</b>	Refers to a distinct unit of an organization, which may or may not be funded by HUD or the Federal partners, whose Primary purpose is to provide services and/or lodging for individuals and families experiencing homelessness or at-risk of experiencing homelessness and is identified by the Continuum as part of its service system.
<b>Coordinated Entry System (CES)</b>	Coordinated Entry (also known as a Coordinated Assessment System) is a consistent, communitywide process to match people experiencing homelessness or at risk of homelessness to community resources. The goal of coordinated entry is to increase the efficiency of local crisis response systems and improve fairness and ease of access to all resources. Coordinated Entry does NOT guarantee access to housing. Coordinated Entry does NOT place people on waiting lists for Section 8 housing, low-income affordable housing complexes, or private housing complexes. Coordinated Entry is NOT an assessment for Emergency Shelter or Services.
<b>Current Living Situation (CLS)</b>	This element provides information on the number of contacts required to engage the client as well as to document a current living situation each time the client is contacted. Applicable for Night-By-Night Shelter, Street Outreach, Services Only, and Coordinated Entry Project Types.
<b>Date of Engagement</b>	The date an interactive client relationship results in a deliberate client assessment or beginning of a case plan. Record the date a client became engaged by a street outreach project or night-by-night emergency shelter in the development of a plan to address their situation. Only one date of engagement is allowed between project start and project exit.
<b>Enrollments</b>	Designates a period of time (i.e.: date range) to measure outcomes (i.e.: entry and exit). Enrollment can be associated with assessments for reporting purposes.
<b>Forms</b>	Questions asked to collect data elements in HMIS
<b>Grant</b>	Money given by a funding entity to a Grantee
<b>HMIS</b>	Homeless Management Information System is an electronic database used to hold information on the characteristics and service needs of homeless people. It generates Housing and Urban Development (HUD) reports to address homelessness
<b>HMIS Administrator</b>	The individual whose job it is to manage the HMIS implementation at the local level, enrolling programs, managing appropriate use, supporting users, etc.
<b>HMIS User</b>	All persons who can log into an HMIS environment are HMIS Users. This includes those who can log into the HMIS for system administration, data entry, resource viewing, or reporting purposes.
<b>Organization</b>	Agency that receives a grant has a program and provides services.

<b>Permanent Supportive Housing (PSH)</b>	Permanent housing in which housing assistance (e.g. long-term leasing or rental assistance) and Supportive Services are provided to assist households with at least one member with a disability in achieving housing stability.
<b>Programs</b>	Refers to the federal funding source (e.g. HUD CoC, HHS PATH, VA SSVF, etc.). You must enroll clients in programs to generate an APR for a grant.
<b>Projects for Assistance in Transition from Homelessness (PATH)</b>	Funds services for people with serious mental illness (SMI) experiencing homelessness.
<b>Project</b>	Distinct unit of an organization as set up in HMIS (e.g. Rapid Re-Housing).
<b>Rapid Rehousing (RRH)</b>	Permanent housing that provides short-term (up to three months) and medium-term (4-24 months) tenant-based assistance and supportive services to households experiencing homelessness.
<b>Service</b>	Provided to a client and is tied to a program and can be associated to a grant, enrollment or goal. The primary function of logging a service is to identify the date the service was given and value related (Count, time, monetary).
<b>Social Security Disability Income (SSDI)</b>	Benefits received by an individual who can no longer work due to a permanent disability but who has worked in the past.
<b>Street Outreach (SO)</b>	Activities designed to meet the immediate needs of people experiencing homelessness in unsheltered locations by connecting them with emergency shelter, housing, or critical services and providing them with urgent, non-facility-based care.
<b>Supplemental Security Income (SSI)</b>	State welfare benefit for persons of retirement age or persons permanently disabled and not of retirement age. This is not Social Security benefits and recipients of this benefit did not pay into the Social Security System.
<b>Supportive Services for Veteran Families (SSVF)</b>	To help veteran families who are homeless or at risk of homelessness quickly regain stability in permanent housing after experiencing a housing crisis and/or homelessness.
<b>Transitional Housing (TH)</b>	Provides temporary housing with supportive services to individuals and families experiencing homelessness with the goal of interim stability and support to successfully move to and maintain permanent housing.
<b>VA Non-Service</b>	A benefit paid to wartime veterans who have limited, or non-income aged 65 or older who are permanently and totally disabled.
<b>VA Service</b>	Connected disability compensation refers to a benefit paid to a veteran with a service-connected disability
<b>VI-SPDAT</b>	Provides a vulnerability score which is used to identify and prioritize clients for the most appropriate support and housing interventions that might be available in the community. The VI-SPDAT does not identify eligibility to any particular program, nor does it make decisions about who should be matched with a particular housing resource or intervention.
<b>Workflow</b>	A series of forms, assessments, and rules which represent a process and are tied together in a sequence. The forms can be of various types from different application areas.

## Grant Number Convention

Grants applied for or renewed through *e-snaps* should have 15-character grant numbers (e.g. ST 000# C 5E 00 08 02), and the last two digits represent the number of times the grant has been renewed. This change in grant numbers is intended to help HUD and the grantee differentiate the funding year for each unique grant (even if the funds are all being used to fund a single project over time). Therefore, these digits change with each renewal. Older grants will only have 11 characters (e.g. ST16B900004)

*For example: The project number if NM007L6B001505*

Field	Description
NM	State Abbreviation
007	Project Identifier
L	Applicant Type
6B	Field Office Code
00	Last Two Digits of CoC Number
15	Year of Funding (FY of the competition)
05	Funding (renewal) Sequence

## Stanislaus HMIS Forms, Documents, and Links

HMIS Policies and Procedures	This document provides the framework for the ongoing operations of the Stanislaus Community System of Care Collaborative Homeless Management Information System (HMIS) Project.	<a href="https://www.csa-stanislaus.com/hmis/pdf/Policies_Procedures_SCOC.pdf">https://www.csa-stanislaus.com/hmis/pdf/Policies_Procedures_SCOC.pdf</a> .
HMIS Data Quality Management Plan	This document provides actionable, measurable steps to address data quality within the Homeless Management Information System (HMIS).	<a href="https://www.csa-stanislaus.com/hmis/pdf/HMIS_Data_Quality_Management_Plan.pdf">https://www.csa-stanislaus.com/hmis/pdf/HMIS_Data_Quality_Management_Plan.pdf</a> .
HMIS Consumer Notice	This document describes how information about clients may be used and disclosed and how they may get access to the information. This document must be posted in all areas HMIS client information is collected.	<a href="https://www.csa-stanislaus.com/hmis/pdf/Consumer_Notice_(Version%2002).pdf">https://www.csa-stanislaus.com/hmis/pdf/Consumer_Notice_(Version%2002).pdf</a> .
HMIS Client Privacy Rights	This document describes how HMIS Partner agencies will use and protect the information about client data that they put into the Stanislaus County HMIS computer system, and their rights to decide who the agencies can share your information with. This document must be posted in all areas HMIS client information is collected.	<a href="https://www.csa-stanislaus.com/hmis/pdf/Client_Privacy_Rights.pdf">https://www.csa-stanislaus.com/hmis/pdf/Client_Privacy_Rights.pdf</a> .
HMIS Client Informed Consent and Release of Information (ROI)	This document must be completed by each client before they are entered into HMIS. If the document is not signed, they should not be entered. The release expires 18 months from the date signed below. This document must be signed, printed, dated, and timed. Anyone over 18 must sign their own ROI. Anyone under 18 will be	<a href="https://www.csa-stanislaus.com/hmis/pdf/ROI.pdf">https://www.csa-stanislaus.com/hmis/pdf/ROI.pdf</a>



	listed under the Head of Household's ROI. This document is available in Spanish.	
HMIS Client Denial of HMIS Consent	If a client is not willing to sign the above ROI, this document will be filled out with the client. They can select whether limited or no information may be entered in the system. Email the HMIS team if this document is completed before entering any information into HMIS.	<a href="https://www.csa-stanislaus.com/hmis/pdf/Client%20Denial%20of%20HMIS%20Consent.pdf">https://www.csa-stanislaus.com/hmis/pdf/Client Denial of HMIS Consent.pdf</a>
Client Revocation of HMIS Consent	This document is used when a client has signed an ROI and decide they would like to revoke their consent. Contact HMIS immediately when this is completed.	<a href="https://www.csa-stanislaus.com/hmis/pdf/Client%20Revocation%20of%20HMIS%20Consent.pdf">https://www.csa-stanislaus.com/hmis/pdf/Client Revocation of HMIS Consent.pdf</a> .
Client HMIS Grievance Form	This document will be completed if a client believes their privacy rights for the information entered into HMIS has been violated. A copy of this signed document will be sent to the Stanislaus County HMIS System Administrator.	<a href="https://www.csa-stanislaus.com/hmis/pdf/Client%20HMIS%20Grievance%20Form.pdf">https://www.csa-stanislaus.com/hmis/pdf/Client HMIS Grievance Form.pdf</a> .
HMIS Coordinated Entry System Verification Form	This document will be used to prove eligibility for any project where the client must be enrolled in Coordinated Entry prior to enrollment. The document will be sent to the HMIS team to verify and sign.	<a href="https://www.csa-stanislaus.com/hmis/pdf/HMIS%20CES%20Verification%20Form.pdf">https://www.csa-stanislaus.com/hmis/pdf/HMIS CES Verification Form.pdf</a> .
HMIS Security Standards	This document is designed to establish security standards for the Stanislaus County Homeless Management Information System (Stanislaus County HMIS) participating agencies within the Stanislaus Community System of Care Collaborative (StanCSOC).	<a href="https://www.csa-stanislaus.com/hmis/pdf/HMIS%20Security%20Standards.pdf">https://www.csa-stanislaus.com/hmis/pdf/HMIS Security Standards.pdf</a>



















## Resources

HMIS Fact Sheet	<a href="https://files.hudexchange.info/resources/documents/HMISFactSheet.pdf">https://files.hudexchange.info/resources/documents/HMISFactSheet.pdf</a>
HMIS Federal Register	<a href="https://www.federalregister.gov/documents/2011/12/09/2011-31634/homeless-management-information-systems-requirements">https://www.federalregister.gov/documents/2011/12/09/2011-31634/homeless-management-information-systems-requirements</a>
HMIS FY 2024 Data Dictionary	<a href="https://files.hudexchange.info/resources/documents/HMIS-Data-Dictionary-2024.pdf">https://files.hudexchange.info/resources/documents/HMIS-Data-Dictionary-2024.pdf</a>
HMIS FY 2024 Data Manual	<a href="https://files.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual-2024.pdf">https://files.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual-2024.pdf</a>
HMIS Regulations and Notices	<a href="https://www.hudexchange.info/programs/hmis/hmis-regulations-and-notices/">https://www.hudexchange.info/programs/hmis/hmis-regulations-and-notices/</a>
HMIS Standard Reporting Terminology Glossary v1.1	<a href="https://files.hudexchange.info/resources/documents/HMIS-Standard-Reporting-Terminology-Glossary-2024.pdf">https://files.hudexchange.info/resources/documents/HMIS-Standard-Reporting-Terminology-Glossary-2024.pdf</a>
HMIS VA Programs Manual	<a href="https://files.hudexchange.info/resources/documents/VA-Programs-HMIS-Manual-2024.pdf">https://files.hudexchange.info/resources/documents/VA-Programs-HMIS-Manual-2024.pdf</a>

HUD CoC APR and HUD ESG CAPER HMIS Programming Specifications	<a href="https://files.hudexchange.info/resources/documents/FY24-HMIS-Programming-Specifications-CoC-APR-and-ESG-CAPER.pdf">https://files.hudexchange.info/resources/documents/FY24-HMIS-Programming-Specifications-CoC-APR-and-ESG-CAPER.pdf</a>
HUD Data Standard Tutorials	<a href="https://www.hudexchange.info/news/hud-releases-hmis-data-standard-tutorials/">https://www.hudexchange.info/news/hud-releases-hmis-data-standard-tutorials/</a>
HUD Exchange	<a href="https://www.hudexchange.info/">https://www.hudexchange.info/</a>
PATH Program HMIS Manual	<a href="https://files.hudexchange.info/resources/documents/PATH-Program-HMIS-Manual-2024.pdf">https://files.hudexchange.info/resources/documents/PATH-Program-HMIS-Manual-2024.pdf</a>
RHY-HMIS Program Manual	<a href="https://files.hudexchange.info/resources/documents/RHY-Program-HMIS-Manual-2024.pdf">https://files.hudexchange.info/resources/documents/RHY-Program-HMIS-Manual-2024.pdf</a>
SOAR SSVF	<a href="https://soarworks.prainc.com/article/soar-and-ssvf">https://soarworks.prainc.com/article/soar-and-ssvf</a>
SSVF Data Guide FY2024	<a href="https://www.va.gov/HOMELESS/ssvf/docs/SSVF_VA_Data_Guide.pdf">https://www.va.gov/HOMELESS/ssvf/docs/SSVF_VA_Data_Guide.pdf</a>

## HMIS Basic Navigation

### HMIS Navigation Icons

	Home		Help		Search Records
	Notifications/Alerts		Print		Open Page Help
	Client and Coordinated Entry use the same icon		Excel Data Export		Excel Export
	Edit		Action Button		User Dashboard
	Additional/Audit Information		Intake		Delete
	Close Window		Maximize Window		Minimize Window



Issues



Reports



Providers



Expand/Collapse



Minimized Windows



Favorites



Data Explorer



Mandatory Data Field



Choose Date



Pause Workflow



Cancel/Remove



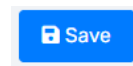
Undo Changes



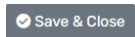
Toggle Menu



Sign Out



Save (save and stay on the same screen)



Save & Close (save and move to the next screen)

## Logging into ClientTrack

[www.clienttrack.eccovia.com/login/modesto](http://www.clienttrack.eccovia.com/login/modesto)

\*Remember to never save your password



Sign in to Modesto

User Name

Password

[Did you forget your password?](#)

## Home Dashboard

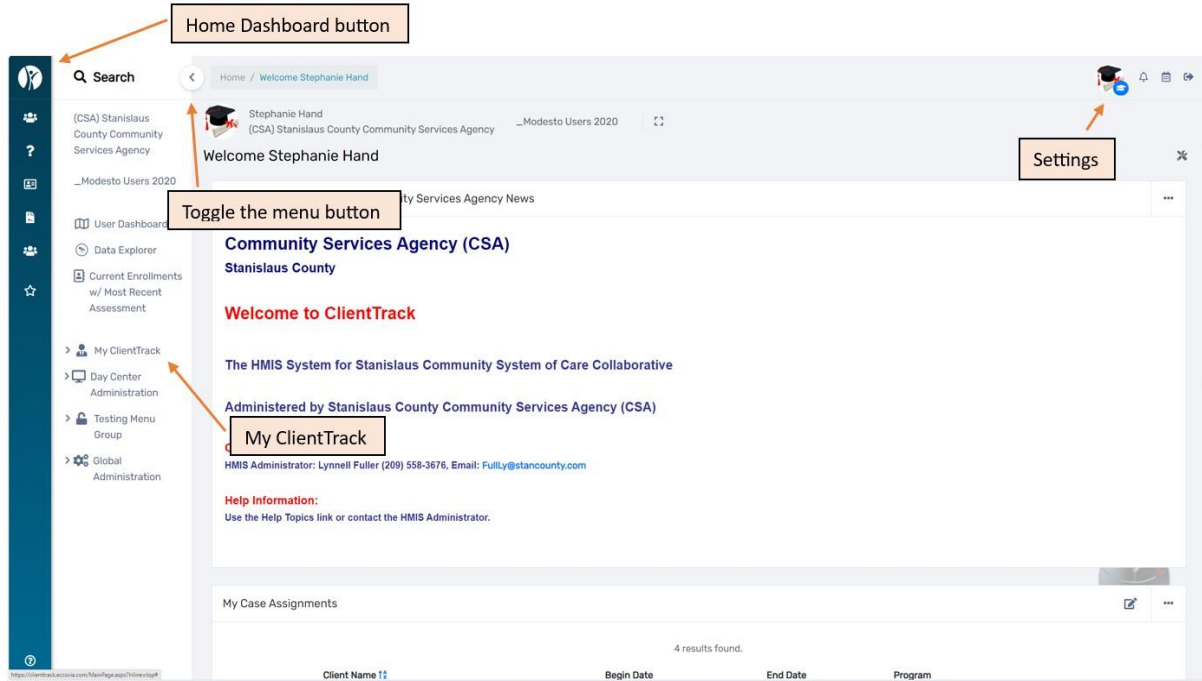
**Home Dashboard:** This is your “Home Workspace” as a user. Here you can view information specific to you like your user configuration, case assignments and current program enrollments. Select User Dashboard to return to the screen shown above.

**Settings:** This will have your initials in a circle. Use this to switch organizations or workgroups, change your theme, or clear your preferences. It is important you ensure you are in the right organization before editing any data.

**My ClientTrack:** This will be where you can view the Coordinated Entry By Name List (BNL), change your

passwords, view your paused operations, add quick services to multiple clients, and view any submitted issue tickets.

**Toggle Menu Button:** Use this if you are unable to see explanations for icons or would like to collapse the menu. to only see icons.



## Client Dashboard

**Client Dashboard:** This is your “Client Workspace” as a user. Here you can view information specific to clients such as their current and past enrollments from your organization, demographics, and assessments.

**Intake:** Use this to start a new intake. Once selected, it will ask if you would like to use the current client listed on your dashboard or a new client.

**Profile:** Use this drop-down menu to update client demographics using Edit Client, add a Case Note, update a Current Living Situation, and more.

**Coordinated Access:** Use this to view if the client has been enrolled in Coordinated Entry or any other organization that participates in HMIS. This tab can be utilized for care coordination, exit destination information, and other information.

**Enrollments:** You will see current and past enrollments in this section. The action button on each enrollment will allow you view and edit information such as Household Members, Project Entry Workflow, Exit Workflow, Assessments, During Program Enrollment Updates, and Annual Assessments.

**Services:** This will give you an overview of the entered services for this client.

**Jasper King's Dashboard**

**Jasper King's Information**

Name: King, Jasper James III | Birth Date: 8/15/1961 | Age: 62  
 Gender: Man (Boy, if child) | Client ID: 53033 | Race: Asian or Asian American, Black, African American, or African

**Jasper's Enrollments**

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Emergency Shelter - Entry Exit	1	Household without Children	08/14/2024			94515	137637	0		(CSA) Stanislaus County Community Services Agency	8/14/2024	0

**Jasper's Services**

No records found.

## Create and Enter an Enrollment

Make sure you have a completed and signed HMIS Release of Information (ROI) from the client before entering their information into the system.

Make sure you are on the Client Dashboard if you are ready to start entering a client into the system. Start by selecting "Find Client" to search for your client to check to see if they are already in HMIS.

Use the first few letters of the first & last name to narrow search, then enter searching for Client, Click Find Client. The system will show a list of names that match your search. If you do not see your client, try using other basic information like the last four digits of their social security number and date of birth before confirming your client has not been entered into HMIS.

**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: ja | Last Name: ki

Middle Name: | Full Name (Last, First): | Social Security Number: | Birth Date: MM/DD/YYYY | Scan Client ID: |

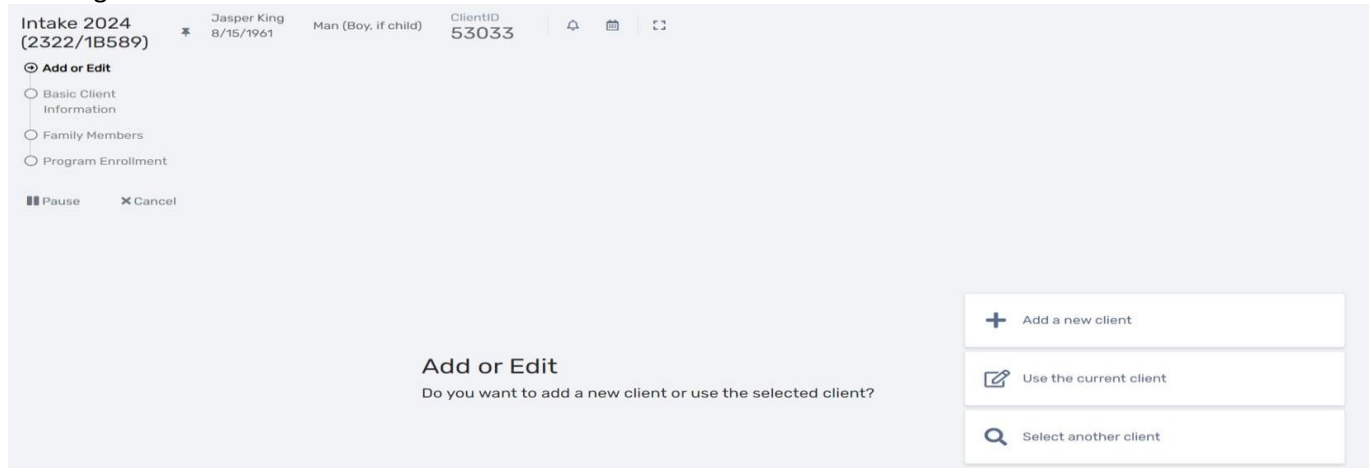
**Search for client**

9 results found.

First Name	Last Name	Middle Name	SSN	Birth Date
Jasper	King	James	439-15-3233	
James	Kinser		611-38-7594	

Select the "Intake" button when you are ready to start an intake.

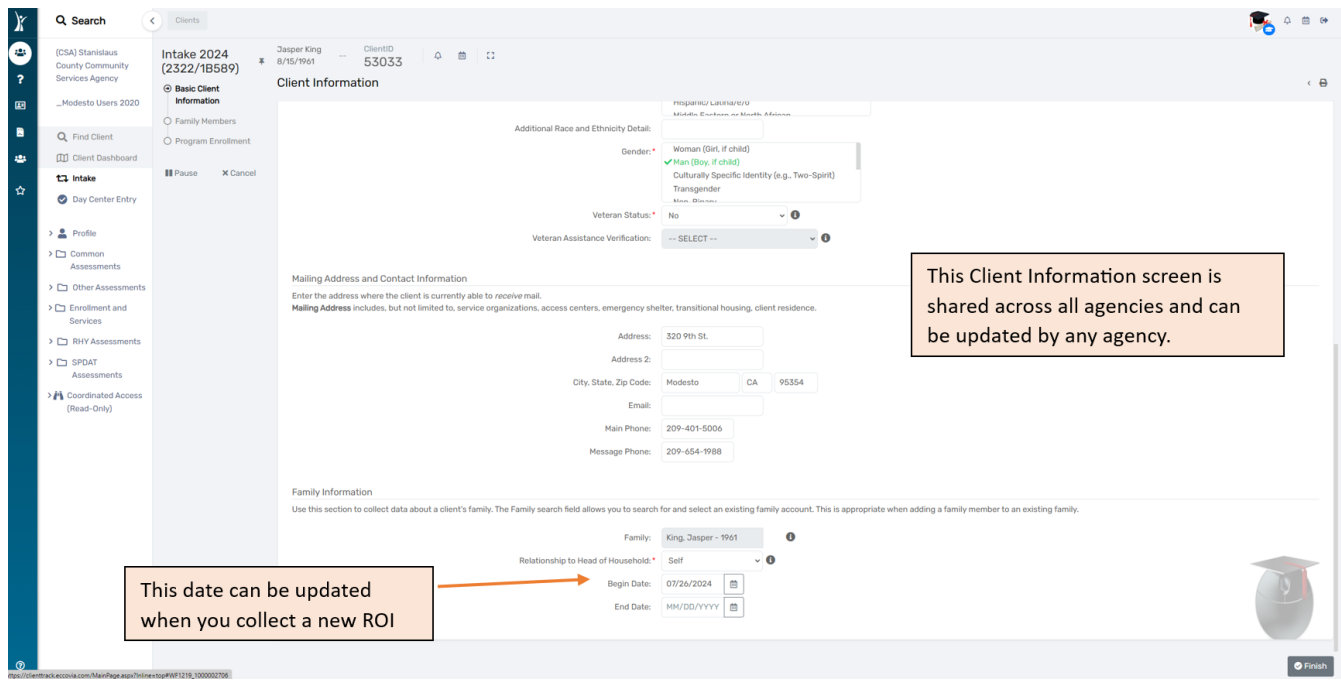
If the client is not in the system, select "Add a new client." If the client was found through your search and you clicked on the name, they will appear in the header; only click "Use the current client" if the clients name is showing in the header.



The system will let you know of any potential duplicates, verify and proceed by clicking next.

If the correct name does appear, click on the name below to proceed.

Enter all client information or update any changes.



This Family Members screen will be just informational unless you will be adding additional family members. More family members may be listed on this screen, however, this historical data. You will be able to attach family members to your enrollment on the next screen.

**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 "[a] 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.

1 result found (+1).

<input type="checkbox"/>	First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date* !!	Age	Birth Date Quality*	Gender*	Please Specify	SSN
<input checked="" type="checkbox"/>	Jasper	James	King	III	Full name reported	08/15/1961	63	Full DOB Reported	Man (Boy, if child)		439 - 15
<input type="checkbox"/>					--SELECT--	MM/DD/YYYY	N/A	--SELECT--	--		

**You may add additional family members on this screen.**

The HUD Program Enrollment screen will allow you to attach the enrollment to your client(s). Once you past this screen.

**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 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:
  - 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, site-based).
- For all other types of Service projects including but not limited to: services only, day shelter, homelessness prevention, coordinated assessment service.

Project: CSA TEST ES

Household

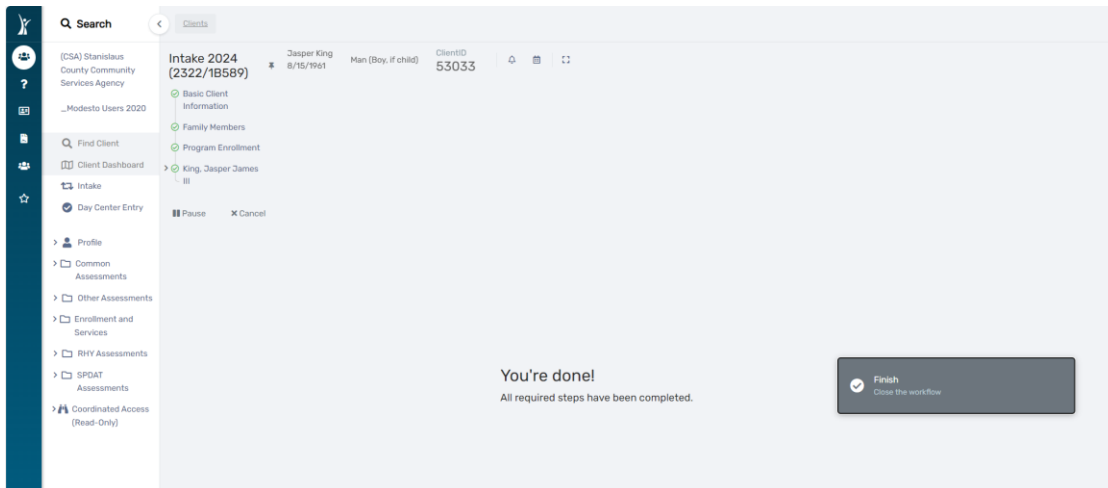
Excerpt from the HMS Data Standards Manual "A household is a single individual or a group of persons who apply together to a continuum project for a dwelling unit if they were housed."

<input type="checkbox"/>	Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*
<input checked="" type="checkbox"/>	King, Jasper James III	Man (Boy, if child)	63	08/16/2024	MM/DD/YYYY	Stephanie Hand	Self

**The project start date will always auto-populate as today's date. If the enrollment was on a different date, it is important this is changed to the information date.**

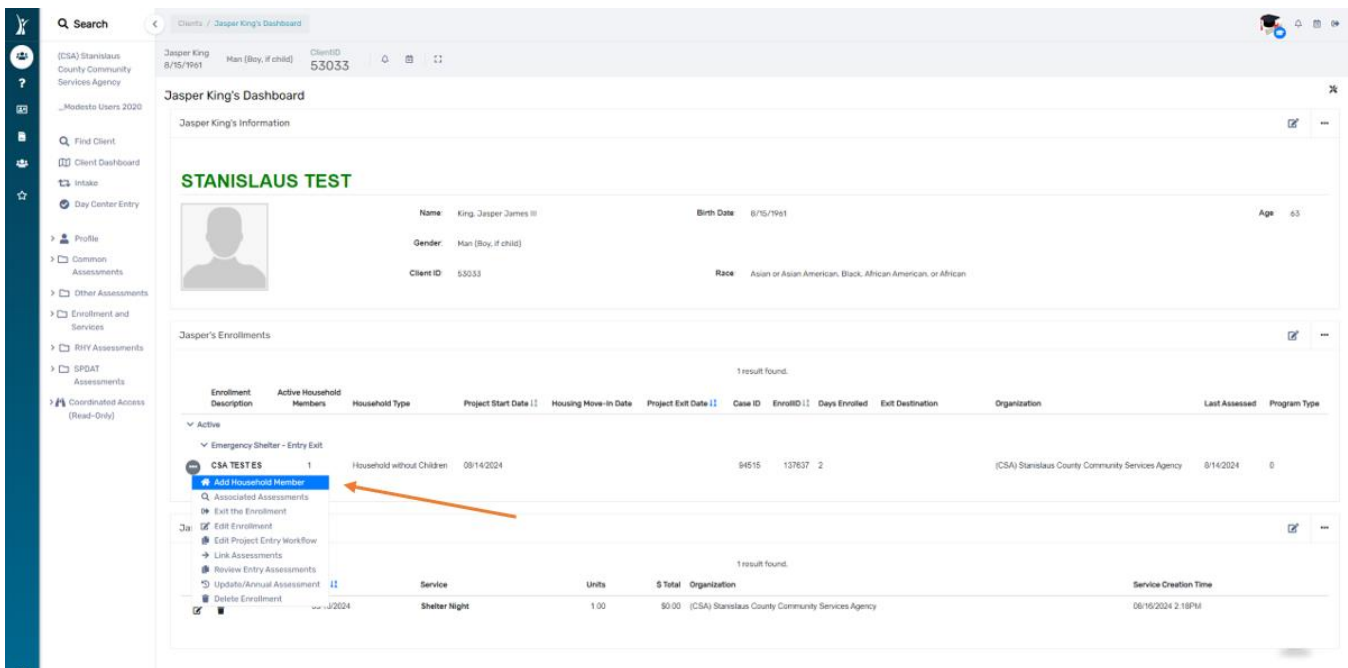
**When there are additional family members, you will mark the check boxes for only the family members you would like to enroll in your project.**

Continue through the workflow and complete all required data collected for your project. When you are finished, the screen will indicate your completion. Select finish.



## Add a Family Member

If you need to add a family member to an enrollment, you will begin on the Head of Household's Client Dashboard and select the action button. Select Add Household Member.



Enter or search for a client to add to the family. Remember to scroll to the right to add a relationship to the head of household.



The screenshot shows the 'Add Family Member' interface for Jasper King. The 'Family Members' section displays a table with the following data:

First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date* T1	Age	Birth Date Quality*	Gender*	Phase Specify	SSN
Jasper	James	King	III	Full name reported	08/15/1961	63	Full DOB Reported	Man (Boy, if child)		439 - 15
Jesus	Michael	Lopez King		Full name reported	05/15/1991	33	Full DOB Reported	Man (Boy, if child)		621 - 33
				--SELECT--	MM/DD/YYYY	N/A	--SELECT--			

An orange arrow points to the magnifying glass icon in the search bar of the table. A text box below the screenshot reads: "Select the magnified glass to search for an existing client."

Once you save and close, you will go to the Enrollment Screen. Add this individual to the current enrollment and select Save.

The screenshot shows the 'HUD Program Enrollment' interface. The 'Household' section displays a table with the following data:

Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*
King, Jasper James III	Man (Boy, if child)	63	08/14/2024	MM/DD/YYYY	Stephanie Hand	Self
Lopez King, Jesus Michael	Man (Boy, if child)	33	08/14/2024	MM/DD/YYYY	Stephanie Hand	Son

An orange arrow points to the grey checkmark in the 'Name' column of the second row. A text box below the screenshot reads: "Family Members listed without a grey check mark will NOT be enrolled in the project"

Once you Save, the Entry Project Workflow will appear for the added Household Member. Complete all information to enroll this individual.

**Search** Clients

(CSA) Stanislaus County Community Services Agency

...Modesto Users 2020

Find Client

Client Dashboard

Intake

Day Center Entry

Profile

Common Assessments

Other Assessments

Enrollment and Services

RHY Assessments

SPDAT Assessments

Coordinated Access (Read-Only)

**Add Family Member**

Review Family Members

Enrollment

Entry Assessments

Pause

Cancel

Jesus Lopez King  
5/15/1991  
Man (Boy, if child)  
ClientID: 53376

**Universal Data Assessment (FY24)**

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: 08/14/2024

Age at Assessment: 33

Assessment Type: Entry

Assessor: Stephanie Hand

Program: CSA TEST ES

Disabling Condition: Yes

**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: Hospital or other residential non-psychiatric medical facility

Length of stay in prior living situation: Two to six nights

Approximate date this episode of homelessness started: 08/01/2024

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: One time

Total number of months homeless on the street, in ES, or SH in the past three years: One month (this time is the first month)

**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: Yes

Default Last Insurance Status

Save

## Add a Current Living Situation (CLS)

Certain projects, including but not limited to Street Outreach and Coordinated Entry, require you to collect and record a Current Living Situation when you contact a client. The Current Living Situation should reflect where the client is staying now (at the moment the information was verified). This may match the client's Prior Living Situation collected at project start; however, the Current Living Situation is collected over time and may change.

Navigate to the Client's Profile to update their Current Living Situation

**Search** Clients / Jasper King's Dashboard

(CSA) Stanislaus County Community Services Agency

...Modesto Users 2020

Find Client

Client Dashboard

Intake

Day Center Entry

Profile

Edit Client

ID Card

Alias History

Address History

Case Managers

Case Notes

Client Files

**Current Living Situation**

Document Check

Family History

Information Release

Information Release Exceptions

Interested Others

Notifications

Photo

Veteran

Jasper King  
8/15/1991  
Man (Boy, if child)  
ClientID: 53033

**Jasper King's Dashboard**

Jasper King's Information

**STANISLAUS TEST**

Name: King, Jasper James III Birth Date: 8/15/1991 Age: 63

Gender: Man (Boy, if child)

Client ID: 53033 Race: Asian or Asian American, Black, African American, or African

Jasper's Enrollments

1 result found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Emergency Shelter - Entry Exit												
CSA TEST ES	2	Household without Children	08/14/2024			94515	137637	5		(CSA) Stanislaus County Community Services Agency	8/14/2024	0

Jasper's Services

1 result found.

Date	Service	Units	\$ Total	Organization	Service Creation Time
08/16/2024	Shelter Night	1.00	\$0.00	(CSA) Stanislaus County Community Services Agency	08/16/2024 2:18PM

Update Current Living Situation

Select Add a New Current Living Situation in the top right corner of the page. You will be prompted to answer the questions below. If a Current Living Situation is Temporary, Institutional, or Permanent, you will be asked additional housing status information. This will determine and verify imminent and at-risk of homelessness status based on HUD's definition of homelessness.

Once completed, you will return to the CLS screen in the previous step. You will be able to see the CLS you completed as well as and additional CLSs. Note: if are only able to see your organization's entered CLSs (except for Coordinated Entry entries). For Coordinated Entry, if a CLS is not added within 90 days, the enrollment will be auto exited.

## During Program Enrollment Update & Annual Assessments

During Program Enrollments are completed to capture changes to the client's Health Insurance, Income, Domestic Violence, Barriers, or Move-In Date. For children, you will be asked to update their Health Insurance and Barriers. This must also be completed for any child who turns 18 during the enrollment. Additional information will be asked including Prior Living Situation, Veteran Status, and Income.

Annual Assessments must be recorded if an individual and/or child has been enrolled in the project for 365 days or more. This must be completed 30 days before or 30 days after the anniversary of the Head of Household's project start date.

Begin on the client's Dashboard and select the action button on the enrollment you would like to complete the update.

**Jasper King's Dashboard**

Jasper King's Information

**STANISLAUS TEST**

Name: King, Jasper James III | Birth Date: 8/15/1961 | Age: 63  
Gender: Man (Boy, if child) | Client ID: 53033 | Race: Asian or Asian American, Black, African American, or African

Jasper's Enrollments

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Emergency Shelter - Entry Exit	2	Household without Children	08/14/2024			94515	137637	5		(CSA) Stanislaus County Community Services Agency	8/14/2024	0

CSA TESTES

- Add Household Member
- Associated Assessments
- Exit the Enrollment
- Edit Enrollment
- Edit Project Entry Workflow
- Link Assessments
- Review Entry Assessments
- Update Annual Assessment
- Delete Enrollment

During Program Enrollment Update and Annual Assessments are both updated here

Service	Units	\$ Total	Organization	Service Creation Time
Shelter Night	1.00	\$0.00	(CSA) Stanislaus County Community Services Agency	08/15/2024 2:18PM

You see the Enrollment Screen; showing you who is currently in the enrollment. After you select No Changes, you will be asked to select the type of Assessment. Select the appropriate Assessment. Note: Each assessment asks different questions. Please ensure you have selected the appropriate Assessment.

Note: if you have more than one individual enrolled in the project, you will be asked if you would like to complete an assessment for all members of the Household

Type of Assessment

- New During Program Enrollment/Update Assessment
- New Annual Assessment

Select the appropriate type of assessment

## Coordinated Read Only Access

Coordinated Read Only Access allows for Users to see if client's have been or are currently enrolled in other projects. This information can be useful in determining case management collaboration, to avoid overlapping enrollments, or to see if a client is enrolled in Coordinated Entry. You will be unable to view the assessments completed by the organizations.

Select the Coordinated Access (Read Only) tab and then select CE Enrollments to view this screen

This is a view only tab. If you have Coordinated Entry Access, please switch organizations before editing any data for the Coordinated Entry Enrollment

Enrollment Description	Case Members	Project Start Date	Housing Move-In Date	Exit Date	Exit Destination	Organization
CSA TEST ES	2	08/14/2024				(CSA) Stanislaus County Community Services Agency
CCD SSVF HP	1	07/28/2024				Catholic Charities Diocese of Stockton
WE CARE WINTER SHELTER	1	08/30/2023				We Care
CHSS HDAP RRH	1	08/15/2023				Community Housing and Shelter Services
WE CARE WINTER SHELTER	1	09/01/2022		09/23/2022	Jail, Prison, Juvenile De...	We Care

## Pause Your Workflow

If you need to walk away from your screen and you are in the middle of a workflow, you may “Pause” a workflow by clicking the pause button located on the left-hand side of your screen. The feature will allow you to pause your workflow and return to it later. You will receive a notification indicating your workflow has been paused successfully.

The screenshot shows the HUD Program Enrollment workflow in ClientTrack. The interface includes a left-hand navigation menu, a main content area with a form, and a notification pop-up. Three callout boxes provide instructions:

- Cancel your workflow here:** Points to the 'Cancel' button in the top right of the form area.
- Pause your workflow here:** Points to the 'Pause' button in the left-hand navigation menu.
- Notification of paused workflow:** Points to a pop-up notification that says 'clienttrack.eccovia.com says The workflow was paused successfully!' with an 'OK' button.

The form area contains the following text and fields:

**HUD Program Enrollment**

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:
  - 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, 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: CSA TEST ES

**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 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)."

Name	Gender	Age	Project Start Date	Exit Date	Case Manager	Relationship to Head of Household*
King, Jasper James III	Man (Boy, if child)	63	MM/DD/YYYY	MM/DD/YYYY		-- SELECT --

If you are timed out while in the middle of a workflow, review your paused operations to see if the system saved your place before completing a new workflow. Please note, if you move past the HUD Program Enrollment screen, the client will be enrolled in the project. This will result in missing data. If this enrollment shows up on their dashboard and you made a mistake, please reach out to HMIS.

**Paused Operations**

**Paused Forms**  
The list below displays the forms you've paused. You can either resume the process where you left off, or purge the paused operation from the system.

Identification	Form Description	Step	Paused

**Paused Workflows**  
The list below displays the workflows you've paused. You can resume the process where you left off; restart the workflow, merging in changes made in the designer; or purge the paused workflow from the system.

Show completed workflows

Description	Workflow	Step	Paused
▶ ⏪ x HIMS 2014 Program Data	King, Jasper James III	Program Enrollment	Aug 16, 2024 12:07 PM
▶ ⏪ x HIMS 2014 Program Data	King, Jasper James III	Basic Client Information	Aug 16, 2024 10:58 AM
▶ ⏪ x HIMS 2014 Program Data	Lopez King, Jesus Michael	Add or Edit	Jul 26, 2024 12:38 PM
▶ ⏪ x Day Center Entry		Scan Client	Jul 23, 2024 6:11 PM

Select resume, restart, or cancel your workflow here.

## Report Issues

If you are experiencing difficulties logging into HMIS, please email [hmis@stancounty.com](mailto:hmis@stancounty.com).

If you are experiencing difficulties while in HMIS, please submit an issue ticket in ClientTrack.

**Jasper King's Dashboard**

Jasper King's Information

**STANISLAUS TEST**

Name: King, Jasper James III | Birth Date: 8/15/1961 | Age: 63  
 Gender: Man (Boy, if child) | Race: Asian or Asian American, Black, African American, or African  
 Client ID: 53033

**Jasper's Enrollments**

1 result found.

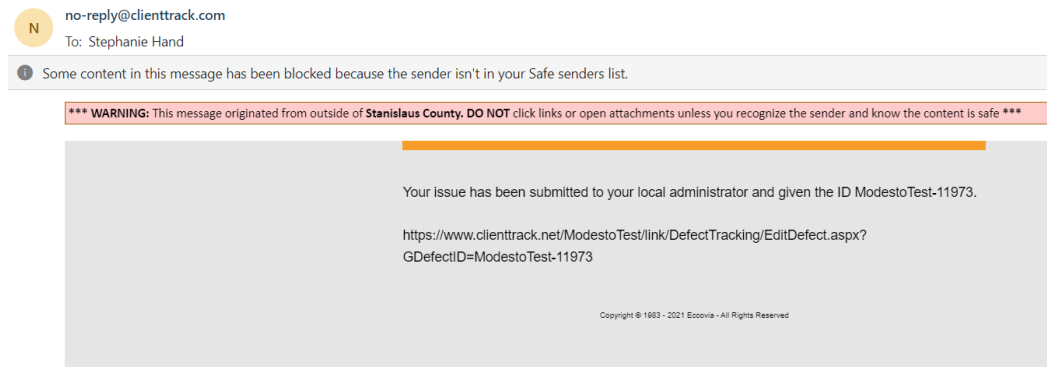
Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Emergency Shelter - Entry Exit												
CSA TEST ES	1	Household without Children	08/14/2024			94515	137637	2		(CSA) Stanislaus County Community Services Agency	8/14/2024	0

Ensure you generate the issue on the page you are experiencing your issue

Select Report an Issue and complete the form with your issue information. You can also attach a file or screenshot to the issue ticket to help provide context. Enter Subject/Summary and add the specifics of your reason for contacting the HMIS Support in the body of the issue statement. Please be very specific when you submit an issue to limit the number of times HMIS support needs to reach out for clarification. If you have access to more than one Organization or Workgroup, please include which you are working in (you can hover over your name to see which you are in).

DO NOT send client full names, dates of birth or social security numbers via email or to the HMIS Support. Identify clients using their unique ClientID.

You will receive an email with a ticket number once it has been submitted to the System Administrator, describing your issue.



## View and Respond to Issues

You will receive an email if the HMIS team has left a note on your issue ticket. This is how we will ask for any clarification or ask you to verify the change has been made. To go back to view your issue, go to My Submitted Issues. You can view/edit each submitted issue you have submitted.



Home / My Submitted Issues

Stephanie Hand  
(CSA) Stanislaus County Community Services Agency ...Modesto Users 2020

### 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.

Issue Status: Assigned Closed Fixed, Verify Needed New Available for Comment

2 results found.

Issue #	Submitted Date	Type	Summary	Status	Assigned To
ModestoTest-1973	08/16/2024	Issue	Remove Enrollment	New	Not Assigned
ModestoTest-1971	07/24/2024	Issue	Slow to load	New	Not Assigned

Cancel

Once you open your submitted issue, you can view or add another note or mark that the issue has been fixed. You can only mark the issue as fixed if you have verified on your end. Please make sure you are reviewing your submitted issues regularly.

Issues

Issue ModestoTest-1973 TEST Remove Enrollment

Assigned

Submitted by Stephanie Hand  
Friday, August 16, 2024

Assigned To Stephanie Hand

Interested Add an interested person

Details

I started an enrollment on the wrong client. Can you please remove the CSA TEST ES enrollment for client 53033 case ID 94515.

Attachments

No Attachments

Notes

Stephanie Hand 2:26 PM  
A new note has been added.

Rich text editor: **B** / **I** / **U** / Rubik / **+** / **?**

Add a new note

Click here to attach

Save the note | Save and update status

Cancel

Any notes that have submitted by the HMIS team or you will be listed here

If you add a note, you can save the note or save and update the status of the note

## Add Services

Currently, RRH, SSVF, RHY, and PATH projects are required to enter services into HMIS. However, any project can track services. You can track If you operate one of those projects, after completing an enrollment for a client, you can document services associated with the project enrollment two ways:

**#1** From the Client Dashboard by clicking on the Client's Services on the bottom of the page.

**#2** From the Client Dashboard, navigate to the Enrollment and Services tab and go to Services.

The screenshot displays the HMIS Client Dashboard for Jasper King. The client's information is shown at the top, including name, birth date, gender, and client ID. Below this, there is a section for 'Enrollment and Services'. The 'Enrollments' section shows a table with columns for Enrollment Description, Active Household Members, Household Type, Project Start Date, Housing Move-In Date, Project Exit Date, Case ID, EnrollID, Days Enrolled, Exit Destination, Organization, Last Assessed, and Program Type. A single enrollment is listed: 'Emergency Shelter - Entry Exit' with 1 active household member, a household type of 'Household without Children', and a project start date of 08/14/2024. The 'Services' section at the bottom of the dashboard is currently empty, with a message 'No records found.' and columns for Date, Service, Units, \$ Total, Organization, and Service Creation Time. An orange arrow labeled '#2' points to the 'Services' link in the left sidebar under 'Enrollment and Services'. Another orange arrow labeled '#1' points to the 'Services' section at the bottom of the dashboard.

Select Add New Service. You will attach the service to an enrollment. The Date will Default to the date you are entering the service, make sure you change if needed. If the enrollment is already closed, you will not see an option under Enrollment, make sure you change the service date to a date during the active enrollment or you will get "Option not in the list" and the service won't be attached or show up on Federal Reports. Tip: Change the service date first so the active enrollments will accurately show, and you can visually see it is attached. There are many services in the service tab, however, if your organization would like to add one, please reach out to the HMIS team.

Make sure you scroll down to view the services under your correct project type.

If you select dollars, enter an amount below.

You can add more information in the comments include check numbers for financial services

Family Income:

Income	Family Income	Family Members	Poverty Level	% of Poverty
\$290.00	\$290.00	1	\$1,255.00	23.11%

Enrollment: 08/14/2024 - CSA TEST ES

Service: Shelter Night

Date: 08/16/2024

Units Of Measure: Dollars

Units: 1.00

Unit Value: \$0.00

Total: \$0.00

User Performing the Service: Stephanie Hand

Comments:

Save Cancel

You can view entered services the same way you add a new service. You are also able to edit a service. If you need a service deleted, please submit an issue ticket with the service type, the date, and the reason for removal.

View/Edit service

A quick glance at all entered services

Jasper King's Dashboard

Jasper King's Information

**STANISLAUS TEST**

Name: King, Jasper James III Birth Date: 8/15/1961 Age: 63

Gender: Man (Boy, if child)

Client ID: 53033 Race: Asian or Asian American, Black, African American, or African

Jasper's Enrollments

1 result found.

Enrollment Description	Active Household Members	Household Type	Project Start Date	Housing Move-In Date	Project Exit Date	Case ID	EnrollID	Days Enrolled	Exit Destination	Organization	Last Assessed	Program Type
Emergency Shelter - Entry Exit	1	Household without Children	08/14/2024					2		(CSA) Stanislaus County Community Services Agency	8/14/2024	0

1 result found.

Date	Service	Units	\$ Total	Organization	Service Creation Time
08/16/2024	Shelter Night	1.00	\$0.00	(CSA) Stanislaus County Community Services Agency	08/16/2024 2:18PM

## Stanislaus County HMIS Client Informed Consent and Release of Information

### Stanislaus County HMIS Client Informed Consent and Release of Information

The Stanislaus County Homeless Management Information System (HMIS) is a shared database and software application which confidentially collects, uses, and shares client-level information related to homelessness in Stanislaus County. On behalf of the Turlock/Modesto/Stanislaus County Continuum of Care ("CoC"), HMIS is administered by the Stanislaus County Community Services Agency (CSA) and Stanislaus' HMIS Vendor, Eccovia Solutions/ClientTrack. Clients must consent to the collection, use, and release of their information, which helps the CoC's homeless service providers provide quality housing and services to homeless and low-income people.

Client information is collected in HMIS and released to housing and homeless service providers (each, a "Partner Agency," and collectively, the "Partner Agencies"), which includes community-based organizations, non-profit organizations and government agencies. Partner Agencies use the information in HMIS: to improve housing and services quality; to identify patterns and monitor trends over time; to conduct needs assessments and prioritize services for certain homeless and low-income subpopulations; to enhance inter-agency coordination; and to monitor and report on the delivery, impact, and quality of housing and services.

Client information is protected by limiting access rights to the database and by limiting the parties to whom the confidential information may be released, in compliance with federal, state, and local regulations governing the confidentiality of client records. Each person or agency with access rights to HMIS, or to whom client information is released, must sign an agreement to maintain the security and confidentiality of client information. Upon any violation of the agreement, access rights may be terminated, and the person or agency found to be in violation of the agreement may be subject to further penalties.

#### **BY SIGNING THIS FORM, I AUTHORIZE THE FOLLOWING:**

- I authorize CSA, Eccovia Solutions/ClientTrack, the CoC, the Partner Agencies, and their authorized agents and representatives to collect, use, and share basic information about me. I understand that the Partner Agencies may change over time, and that a current list of Partner Agencies has been provided to me. I also understand that I may request a copy of this form be provided to me. This form may not be amended or modified except on approval of the Stanislaus CoC. I understand that I may view an updated list of Partner Agencies at any time or view the list at: [http://www.csa-stanislaus.com/hmis/#\\_participating\\_agencies](http://www.csa-stanislaus.com/hmis/#_participating_agencies)
- I understand that the collection, use, and release of this information is for the purpose of assessing my needs for housing, counseling, food, utility assistance, or other services.
- I understand that I may cancel this authorization at any time by written request, but the cancellation will not be retroactive (No records in the system will be removed from the HMIS databased and will remain accessible to the limited number of organization(s) that provided you with direct services).
- I understand that I have the right to view my HMIS record and will have a report prepared within 10 working days from my written request.
- I understand that if I refuse consent to share this information, I cannot be denied services unless I am being enrolled in an SSVF program.
- This release expires 18 months from the date signed below.

**BY INITIALLING THE BOX BELOW, I FURTHER AUTHORIZE** the following information to be entered into the Stanislaus County HMIS and shared between partner agencies:

Identifying Information: Name, Social Security Number, Date of Birth, Gender, Ethnicity & Race, Marital & Family status, Household Relationships, Phone Numbers, and Address<sup>1</sup> or other similar identifying information. If I do not initial the box below, I do not consent for this information to be entered in the Stanislaus County HMIS.

<b>Client Initial</b>	
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**BY INITIALLING THE BOX BELOW, I AUTHORIZE** the following additional information to be entered in the Stanislaus County HMIS and shared between Partner Agencies to better prioritize my needs and improve the social and housing services provided to me. By initialing the spaces in the two tables below, I authorize that the information or records entered into the Stanislaus County HMIS and shared with Partner Agencies and may include the following specific types of protected personal information (PPI) and protected health information (PHI). If I do not initial the box(es) below, I do not authorize the specific type of information to be shared with Partner Agencies.

• **PHI:**

- Medical information included in my responses to questions asked as part of the standard HMIS intake.
- HIV/AIDS-related information included in my responses to questions asked as part of the standard HMIS intake.
- Mental health information included in my responses to questions asked as part of the standard HMIS intake and identification as a client receiving mental health services from Behavioral Health and Recovery Services or another Partner Agency.
  - Substance abuse treatment information included in my responses to questions asked as part of the standard HMIS intake and identification as a client receiving substance abuse or alcohol treatment from Behavioral Health and Recovery Services or another Partner Agency.

<b>Client Initial</b>	
-----------------------	--

• **Additional Information to Improve Service Delivery:**

- My photograph or other likeness
- Financial and benefits information (including: employment status, income verification, public assistance payments or allowances, food stamp allotments, health care coverage, or other similar financial or benefits information).
- Housing information, including history and housing related issues.
  - Information about services provided by HMIS Partner Agencies (including: date, duration, and type of service; and other similar service information)
  - Other (specify): \_\_\_\_\_

<b>Client Initial</b>	
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<sup>1</sup> This list of identifying information references the HUD Required Data Elements regarding Basic Demographics.

**I UNDERSTAND THAT:**

- My PPI and PHI are protected by federal, state, and local regulations governing the confidentiality of client records. My information cannot be released without my written consent, except to the extent that the regulations provide otherwise.
- Auditors or funders who have legal rights to monitor or review the work of one or more Partner Agencies, including the U.S. Department of Housing and Urban Development, may view my PII and PHI in the ordinary course of their work.
- Eccovia Solutions/ClientTrack serves as the System Administrator for the Stanislaus County HMIS.
- To the extent that authorized agents and representatives of Eccovia Solutions/ClientTrack perform work on HMIS, they may view my information in the ordinary course of their work.
- Partner Agencies and their authorized agents and representatives who use HMIS to research and write reports have signed agreements to maintain the security and confidentiality of client information.
- Use of my likeness in a photograph will be viewable by the Partner Agencies and their authorized agents and representatives. The photograph may be cropped or edited as needed.
- I understand that medical, HIV/AIDS, mental health, and drug and alcohol records are protected under various federal and state regulations, including California Welfare and Institutions Code Section 5328, Confidentiality of Medical Information Act, California Civil Code Section 56.10 (CMIA), the Health Insurance Portability and Accountability Act, 45 C.F.R., parts 160 and 164 ("HIPAA"), and the Federal Regulations Governing Confidentiality of Drug Abuse Patient Records, 42 C.F.R., Part 2, and cannot be disclosed without my written consent unless otherwise permitted by law.
- I expressly authorize my information disclosed pursuant to this Consent to be further disclosed by the recipients listed above for the purposes of assessing my needs for housing, counseling, food, utility assistance, or other services as part of the work of the CoC and HMIS.

**SIGNATURE**

Date: \_\_\_\_ Time \_\_\_\_\_AM/PM

Signature of Client/Parent or Representative:

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If signed by a person other than the client, indicate relationship:

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Print Name:

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**Child/Children's Name Covered under this ROI:**


**Stanislaus County HMIS Client Denial of HMIS Consent**

**Stanislaus County HMIS Client Denial of HMIS Consent**

**Very limited personal information may be entered:**

I give \_\_\_\_\_ (Agency Name) **permission to enter only the following very limited personal information** into the Stanislaus County HMIS data base.

In the System:

Not in the System:

- |  |   |
|--|---|
| • Last 4 digits of Social Security Number <i>(if provided)</i> | • Name <i>(if provided)</i>                   |
| • Gender <i>(if provided)</i>                                  | • Social Security Number <i>(if provided)</i> |
| • Date of Birth <i>(if provided)</i>                           | • Last Permanent Address <i>(if provided)</i> |
| • Phone Number <i>(if provided)</i>                            |   |

***(Please Choose and Check One of the Following Boxes)***

**No personal information may be entered:**

I do not give \_\_\_\_\_ (Agency Name) **permission to enter any identified personal information** about me into the Stanislaus County HMIS data base. This also means that I do not give **permission to this agency to share** any information about me in the Stanislaus County HMIS data base.

In the System:

Not in the System:

- |                           |  |
|---------------------------|--|
| • No Personal Information | • Name <i>(if provided)</i>                        |
|                           | Social Security Number <i>(if provided)</i>        |
|                           | Gender <i>(if provided)</i>                        |
|                           | Day, Month, and Year of Birth <i>(if provided)</i> |
|                           | Last Permanent Address <i>(if provided)</i>        |
|                           | Phone Number <i>(if provided)</i>                  |

I understand that I will be able to get the same services from this agency whether I allow them to enter identified person information about me into the Stanislaus County HMIS or not.

\_\_\_\_\_  
*Client or Guardian Signature*

\_\_\_\_\_  
*Relationship to Client*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Print Client or Guardian Name*

\_\_\_\_\_  
*Agency Witness Signature*

\_\_\_\_\_  
*Print Name*

\_\_\_\_\_  
*Date*

## Stanislaus County HMIS Client Revocation of HMIS Consent

I hereby revoke permission for this partner agency in the Stanislaus Community System of Care Collaborative to share my personal information and information regarding my family in the Stanislaus County Homeless Management Information System (HMIS). I understand that my information will remain in Stanislaus County HMIS as part of the nonidentifying data collected on homeless services provided through the Stanislaus Community System of Care Collaborative.

I understand that this revocation will become effective immediately upon receipt of my signature and I will continue to receive services.

\_\_\_\_\_  
Client Name (*Please Print*)                      Client Signature                      Date

Executed at:

\_\_\_\_\_  
Name of Partner Agency                      Date

\_\_\_\_\_  
Agency Personnel Name (*Please Print*)                      Agency Personnel Signature



Stanislaus County HMIS Client Privacy Rights

**Stanislaus County HMIS Client Privacy Rights**



**Stanislaus County HMIS Lead Agency**



[Agency Name]  
(HMIS Partner Agency)

This notice describes how HMIS Partner agencies will use and protect the information about you that they put into the Stanislaus County HMIS computer system, and your rights to decide who they can share your information with.

<b>HMIS PARTNER AGENCY USE OF YOUR INFORMATION</b>	<ul style="list-style-type: none"> <li>Information you provide to this agency will be entered into the Stanislaus County HMIS computer system, unless you tell them you do not want it to be. (Excluding SSVF Programs).</li> <li>You will receive the same services, whether or not you allow your personal information to be entered into the Stanislaus County HMIS. (Excluding SSVF Programs which are required to provide).</li> <li>Your personal information that is in the Stanislaus County HMIS will not be shared with any other people or organizations, even other Stanislaus County HMIS Partner Agencies, unless you say it can be. (Excluding SSVF Programs, will be shared with the US Department of Veteran Affairs).</li> <li>Your personal information that is in the Stanislaus County HMIS will not be shared with any government agencies except as required by law.</li> <li>Information in the Stanislaus County HMIS is used to improve services for our clients.</li> </ul>	
<b>YOUR RIGHTS &amp; CHOICES</b>	<ul style="list-style-type: none"> <li>You have the right to refuse to provide personal information, or to stop this agency from entering your personal information into the HMIS computer system. (Excluding SSVF Programs, required).</li> <li>You have the right to decide what personal information can be shared about you in the Stanislaus County HMIS, and who it can be shared with. (Excluding SSVF Programs, required).</li> <li>You have the right to change your mind about what personal information about you this agency has in the Stanislaus County HMIS, what types of information about you they can share, and who they can share it with. You must notify this agency in writing if you change your mind. (Excluding SSVF).</li> </ul>	
<b>CONTACT INFO</b>	<p><b>Stanislaus County HMIS Project c/o Stanislaus Community Services Agency</b> 251 Hackett Rd, Modesto, CA. 95358 <a href="mailto:HMIS@stancounty.com">HMIS@stancounty.com</a> <a href="http://www.csa-stanislaus.com">www.csa-stanislaus.com</a></p>	<p><b>[Agency Name]</b> <b>[Agency Address]</b> <b>[Agency Phone]</b></p>

\*Stanislaus County HMIS Client Privacy Rights\*, Version 3, 07232020 LF

# Stanislaus County HMIS Consumer Notice



## **THIS NOTICE DESCRIBES HOW INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU MAY GET ACCESS TO THIS INFORMATION**

### **Our Duty is to Safeguard Your Protected Information**

**[Agency Name]** collects information about who uses our services. We will ask you for your written or verbal permission to enter the information we collect about you and your family into a computer program called the Stanislaus County Homeless Management Information System (HMIS). We are required to protect the privacy of your identifying information. We must give you a notice about how, when, and why we may use or disclose any information you share with us. We are also required to follow the privacy practices described in this Notice, although **[Agency Name] reserves the right to change our privacy practices and terms of this Notice at any time.** You may request a copy of this Notice from any participating Stanislaus County HMIS Agency.

### **How We May Use and Disclose Your Information**

Data collected is used and disclosed for reporting on homelessness and services needed by those who are homeless. Information that could be used to tell who you are will never be used for these reports. We will not turn your information over to a national database. We must have your written or verbal consent to use or disclose your information unless the law permits or requires us to make use or disclosure without your permission. **Please review the [Client Informed Consent and Release of Information](#) for details. You must sign or give verbal consent before we can use your information, but you do not have to sign or give verbal consent in order to receive services.**

The policy may be amended at any time and amendments may affect information obtained by the Agency before the date of the change. An amendment to the privacy notice regarding use or disclosure will be effective with respect to information processed before the amendment, unless otherwise stated.

### **Your Rights Regarding Your Information**

- ◇ You have the right to get services even if you choose **NOT** to participate in HMIS.
- ◇ You have the right to ask for information about who has seen your information.
- ◇ You have the right to see your information and change it if it isn't correct.

For more information, contact: Stanislaus County HMIS at (209) 558-3676 or (209) 558-2381