HMIS Intake: Folder

This section will overview basic navigation and anatomy of intake workflows*.   For details about specific programs, reach out to your supervisor(s) or email hmis@changinghomelessness.org.

The **“**HMIS Intake” function will start a new program enrollment workflow**. Use this function to enroll a client into a new program.

** For basics regarding general data input for workflows, see Chapter 5: Basics of Entering Data into ClientTrack/*ClientTrack Workflows in *the* “HMIS Basic User 2025 Manual”.

*** For online tutorials on general intake enrollments, scan the QR code*** in this section or visit chiedconnect.net and navigate to the HMIS How-To self-enrolled course, and select “Enrollment Tutorials”.*

**** For information regarding online resources, see* Introduction/Online Resources in *the* “HMIS Basic User 2025 Manual”.

QR – Enrollment Tutorials

<u>Steps to Navigate to the “HMIS Intake” Folder Menu</u>

Step 1: Navigate to the Client Workspace*.

**To learn how to navigate to the Home and Client workspaces, see Chapter 2: Navigating in ClientTrack/General Navigation/*Workspaces *in the* “HMIS Basic User 2025 Manual”.

Step 2: Select the “HMIS Intake” secondary sidebar* menu option. ClientTrack will navigate to the “Intake” workspace container.

**For terminology regarding HMIS spaces, go to Chapter 1: HMIS Client Track Basics/General Navigation/*General Page Anatomy and Page Terminology in *the* “HMIS Basic User 2025 Manual”.

Best Practices to Search for Clients in HMIS

**For instructions on the mechanics of how to perform a Find Client search, see Chapter 2: Navigating in ClientTrack/Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/*[Search for Client Using "Find Client"](#) *in the* "HMIS Basic User 2025 Manual".

When searching for a client in ClientTrack/HMIS, follow these simple guidelines to prevent creating multiple records.

Step 1: Cast a wider net than needed. When starting a search, it is better for you to get too many records returned rather than too few. You can always look at the list of potential matches and select the correct record.

- Start by entering the first 2 letters of the client's first and last. This will ensure that if a record already exists for this client with the name slightly misspelled, the search will return that record.

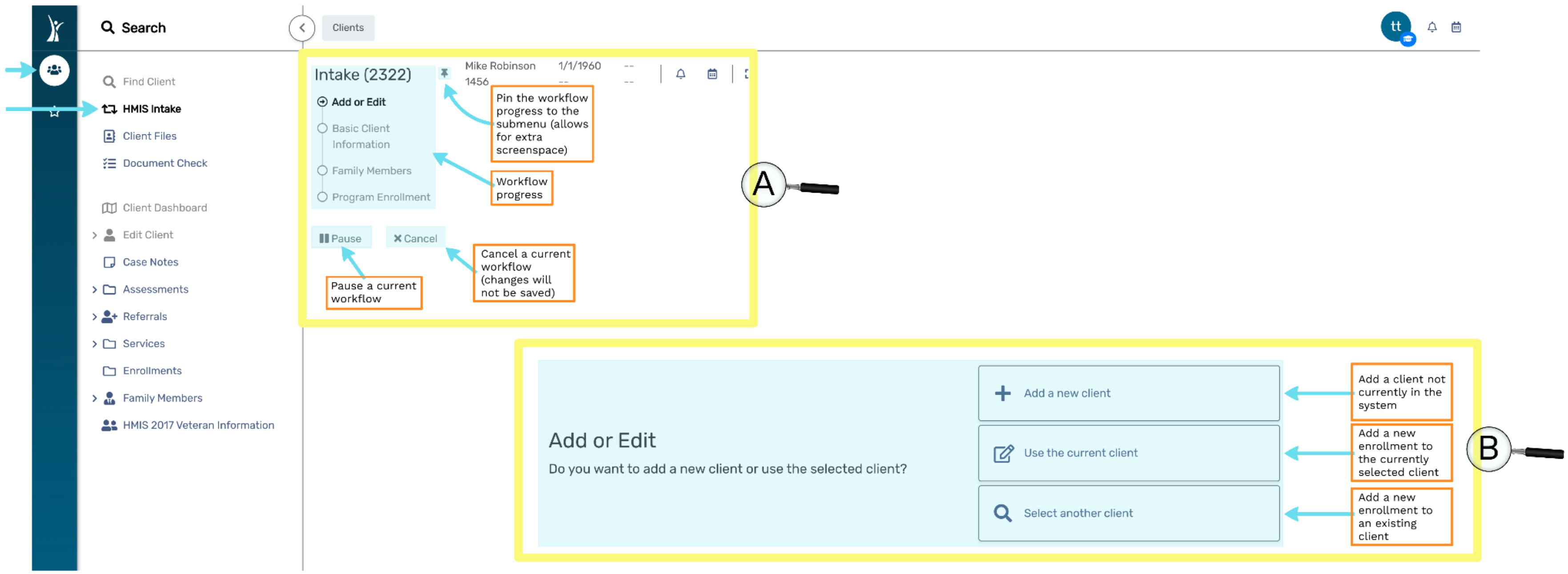
Step 2: Use all available information available. Any personal identifiable information such as a social security number, a birthday, etc., may be useful information to search for or verify a client's identity. Search multiple times using different information.

- A client may have had an existing profile in HMIS that has incorrect information such as a misspelled name or incorrect social. Therefore, step 2 can help compliment the search process that started with Step 1. Searching in multiple scenarios, for example, entering simply a first letter of a first and last name, a birthday, and a partial social may locate a previously entered client's incorrect data. Next, for example, enter the first two letters, no birthday, and a couple of different social digits.
- The effectiveness of a search increases with logical and strategic search criteria. Once an effective search strategy is obtained, searching for and preventing multiple client records is effective and sustainable.

Step 3: Verify information. If a potential record has been found, make sure that other data matches. If any doubt exists, such as missing or inconsistent information, reach out to a supervisor and/or email hmis@changinghomelessness.org to gain assistance on verifying a client's profile.

- HMIS records are confidential as outlined by the rules and regulations. Therefore, if a potential record shows, for example, the client has a daughter, avoid saying, "Do you have a daughter named -------- ?". Instead, ask an open-ended question such as, "Have you had any family or friends associated with you that may already be in our HMIS system?"

HMIS Intake Workflow Anatomy



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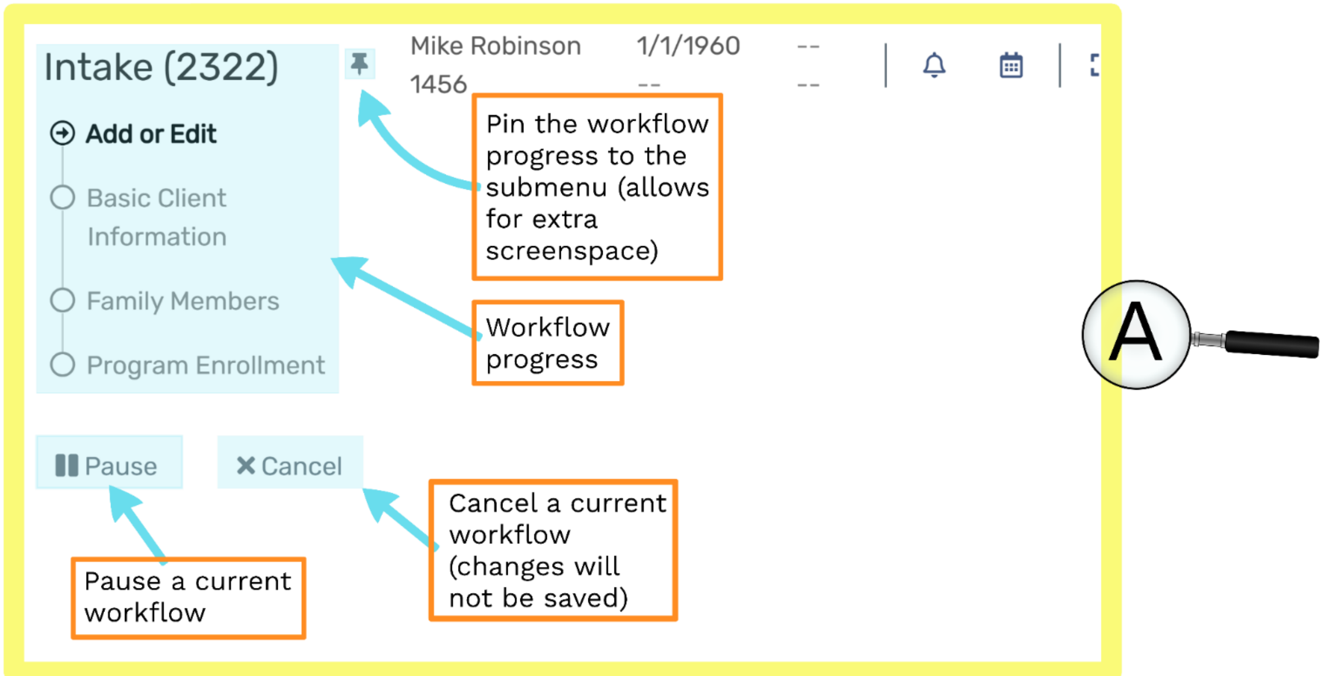

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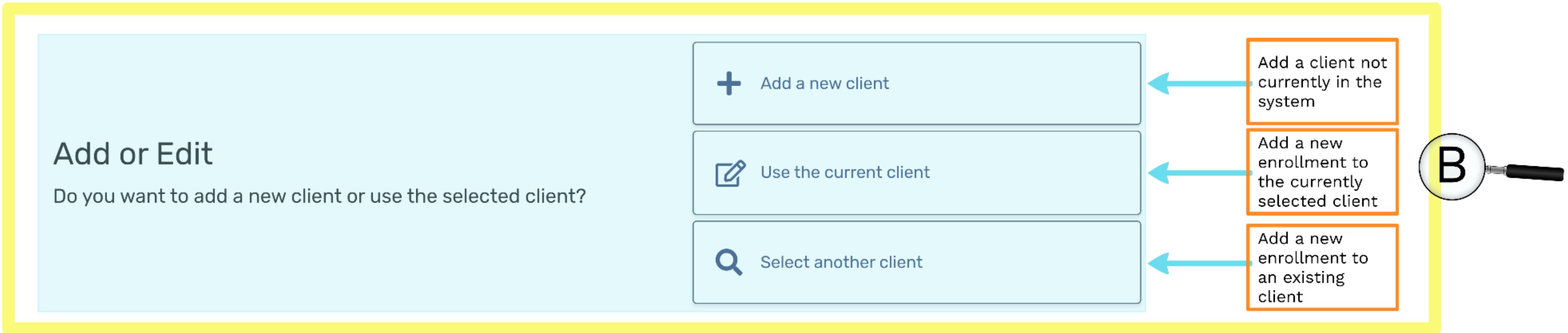

HMIS Intake Workflow Anatomy

HMIS Intake Workflow Methodology

Universal Data Elements

Program Specific Data Elements

STEPS	DATA COLLECTED	PAUSING HERE WILL	CLOSING HERE WILL
Basic Client Information	First Name Last Name Name Quality Social Security Number SSN Quality Birth Date Date of Birth Quality Ethnicity Race Gender Disabling Condition Veteran Status (18+) Relationship to Head of Household	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	For existing clients: Erase the Workflow. The workflow will not be retrievable. For clients new to HMIS: A new client record will be created, but no enrollments will be started for that client
Family Members	**For Each Family Member Added:** First Name Last Name Name Quality Birth Date Date of Birth Quality Ethnicity Social Security Number SSN Quality Race Relationship to Head of Household Gender Disabling Condition Veteran Status (18+)	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	For family members in HMIS: Erase the Workflow. The workflow will not be retrievable. For family members NEW to HMIS: A new record will be created for each new family member, but no enrollments will be started for those clients
Program Enrollment	**Select Program to Enroll Client In:** The list of available programs will depend on a few things: 1) Which programs your agency provides 2) If it is a new program, the HMIS Systems Team needs to know how you would like it set up in ClientTrack 3) If you are enrolling the client within the program start/end dates	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	Before clicking "Save": Erase the Workflow. The workflow will not be retrievable. After Clicking "Save": Save the Workflow under a Client's Enrollments
"POINT OF NO RETURN": Once the "Save" button on the Program Enrollment form is clicked, do not change any data on the Basic Client Information, Family Members or Program Enrollment forms. The Workflow will not update. Instead, contact hmis@changinghomelessness.org or send an issue ticket.			
Head of Household Assessments	**Assessments:** Universal Data Assessment Program Specific Data Element Assessemnts vary by the specfic data elements a program is trying to capture. Examples include, but are not limited to, Veteran Details, Income, Current Living SItuation, Barriers/Special Needs.	Save the workflow under Paused Operations on the form where the workflow was left off. If the "Save" button was not clicked, no data entered on the form will be saved	Before clicking "Save": Close the workflow. All data on form will be lost. After Clicking "Save": Save the Workflow under a Client's Enrollments with all data saved. Partial workflow may lead to data quality issues