Intaking a Client Without Personally Identifiable Information

This section has information and instructions on how to intake a client without personally Identifiable information. For information regarding rules and regulations when entering personally Identifiable information in HMIS Client Rights and Responsibilities in the Introduction section of the HMIS Basic User 2026 Manual.

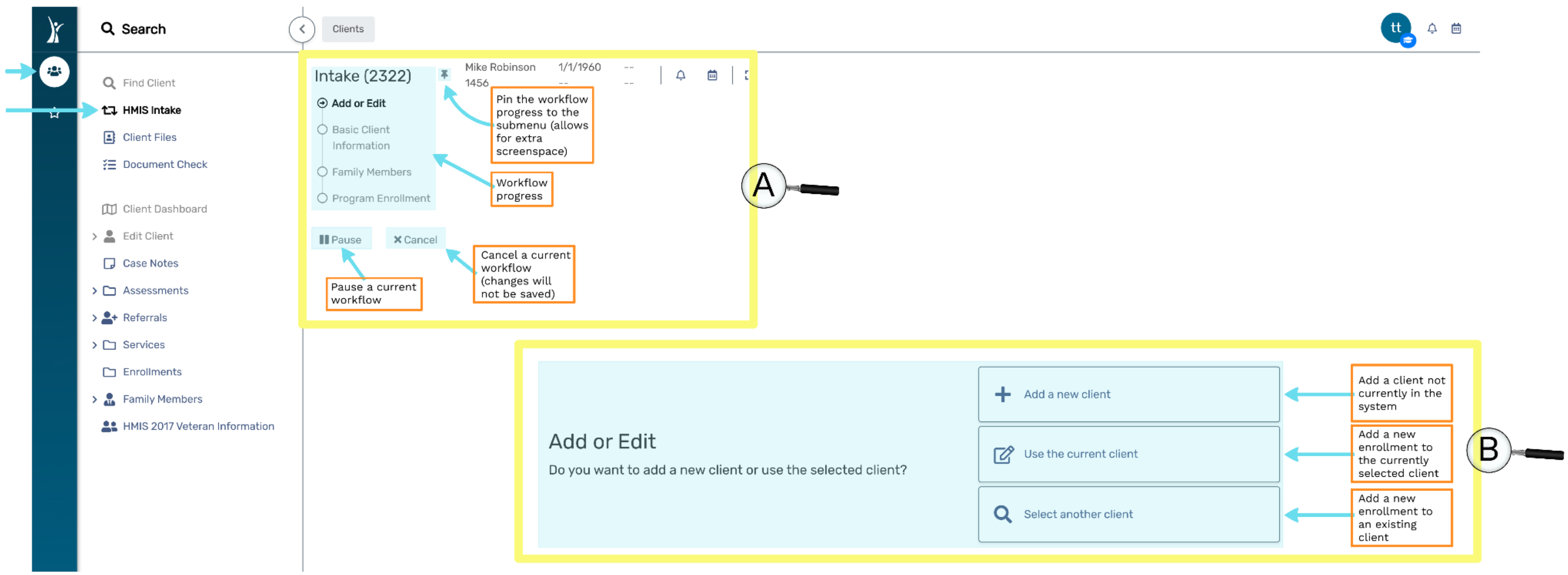
<u>**Steps to Intake a Client without Personally Identifiable Information**</u>

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".



HMIS Intake: Folder Navigation and Anatomy

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

** 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 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".*

Step 3: To add a new client, click the "Add a new client" button. ClientTrack will navigate to the "Client Information" workflow step in the enrollment workflow.

Step 4: Click "Next" to begin to add a new client without adding personally identifiable information (PII). ClientTrack will ask to review for duplicate clients*. Click "Next" to continue with the "Basic Client Information" workflow step.

** For instructions on best practices on preventing duplicate clients, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders/Find Client: Folder/Best Practices to Search for Clients in HMIS in the "HMIS Basic User 2026 Manual."*

Tips and Tricks - *"Client doesn't know", "Client prefers not to answer", and "Data not collected."*

Client doesn't know

If the client doesn't have the information or is unable to recall it, selecting "client doesn't know" accurately reflects their response

Client prefers not to answer

When a client, after being asked a question, knows the information but chooses not to provide it for recording

Data not collected

The client is no longer available before data collection is complete

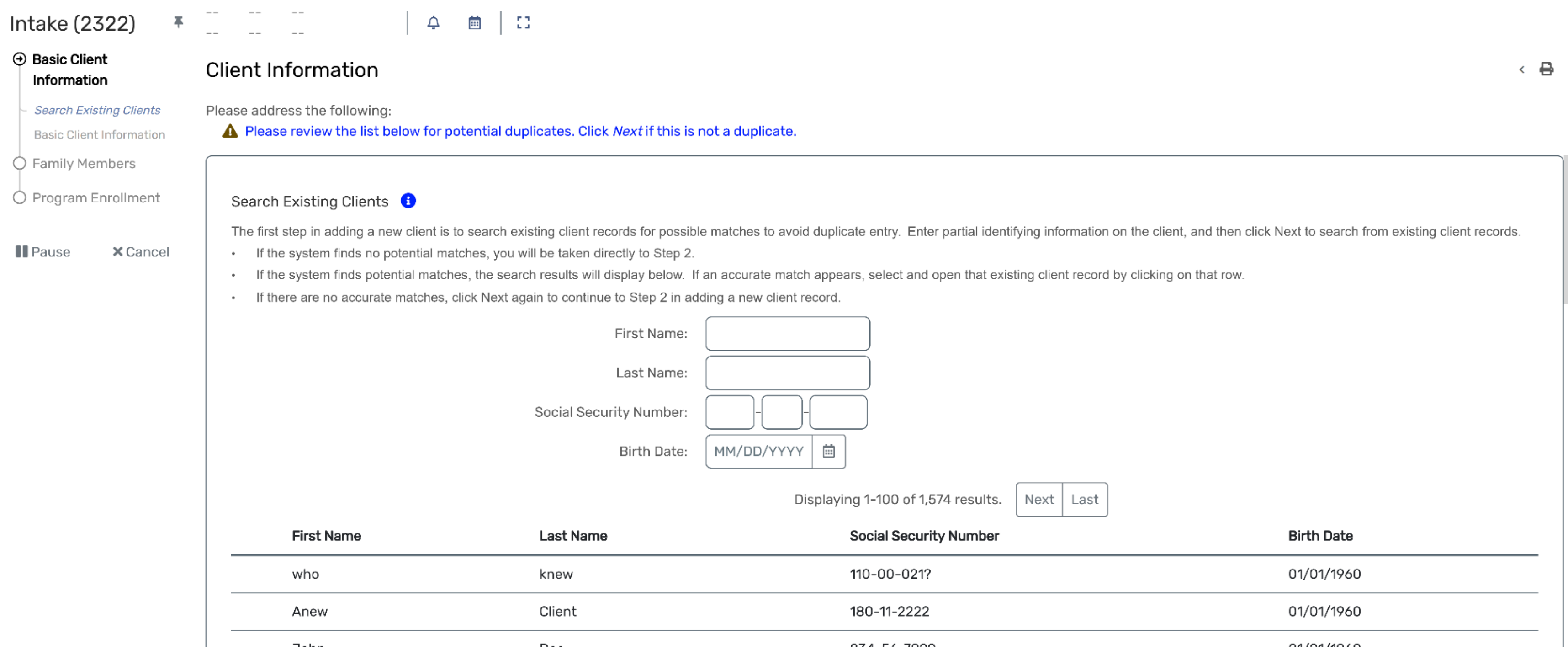
The information is unknown, and no other valid response option fits

Collecting the data is prohibited by specific program rules

Don't use it when:
The answer is simply "No" or "None" — use the appropriate response for that (e.g., "No income" instead of "Data not collected").
There's an applicable answer, even if vague (e.g., "Other," "Client doesn't know," "Client prefers not to answer")

"Data Not Collected" can negatively impact your agency's data quality score. HUD monitors this, and high usage can signal problems in intake or data collection practices

Client Doesn't Know, Client Prefers not to Answer, Data not Collected



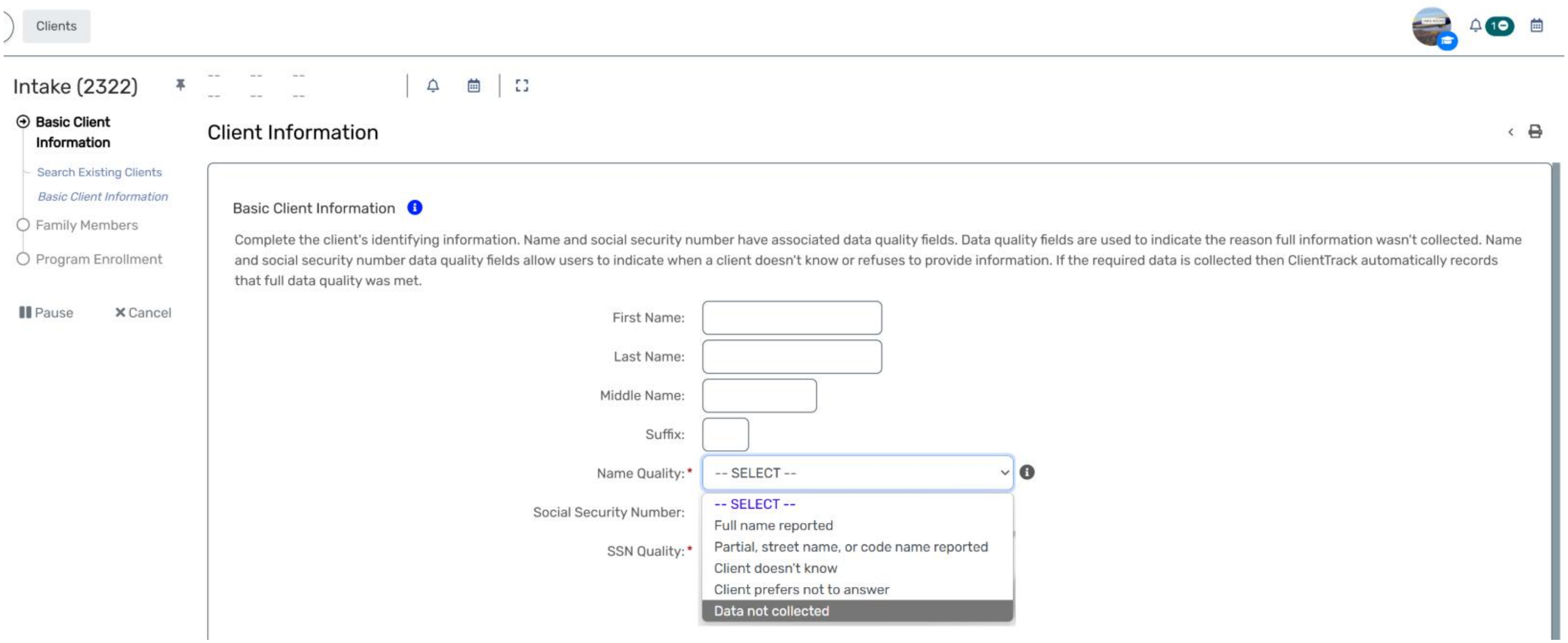
Search Existing Clients Without Personally Identifiable Information

Step 5: Leave the “First Name”, “Last Name”, “Middle Name”, and “Suffix” text boxes blank. Select “Name Quality” and choose “Data not collected” from the dropdown list. The form will hide and delete any information in the “First Name”, “Last Name”, “Middle Name”, and “Suffix” text boxes.

Tips and Tricks - *Entering in Placeholder Values*

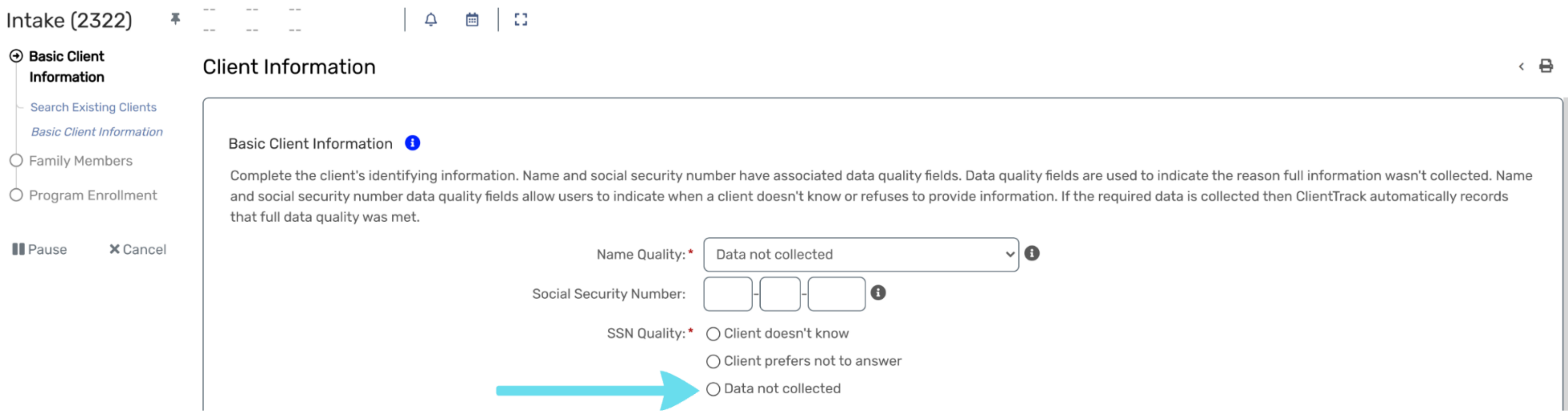
ClientTrack's HMIS doesn't distinguish between true and false values. Therefore, if a value is missing, leave the value blank and select appropriately either "Client doesn't know", "Client prefers not to answer", or "Data not collected."

True and False Values



Basic Client Information Without Personally Identifiable Information – Name

Step 6: Leave the “Social Security Number” integer box blank. For the SSN Quality, select “Data not collected”.



Basic Client Information Without Personally Identifiable Information – Social Security Information

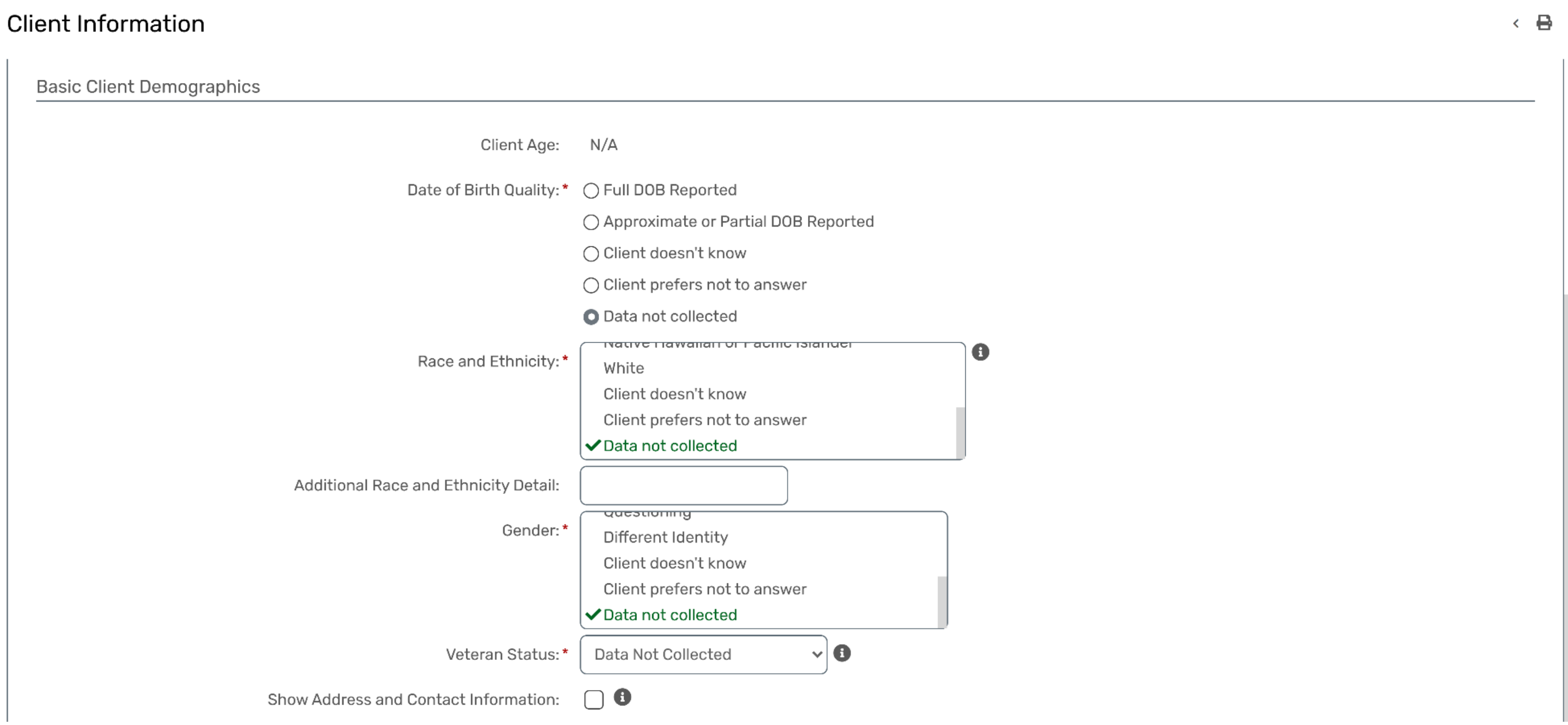
Step 7: **<u>Basic Client Demographics –</u>**

<u>Date of Birth:</u> Leave the “Date of Birth” integer box empty. For the “Date of Birth Quality”, select “Data not collected”.

<u>Race and Ethnicity:</u> Scroll to the bottom of the text box and select “Data not collected.”

<u>Gender:</u> Scroll to the bottom of the text box and select “Data not collected.”

<u>Veteran Status:</u> Click the box to initiate the dropdown options. Select, “Data not collected.”



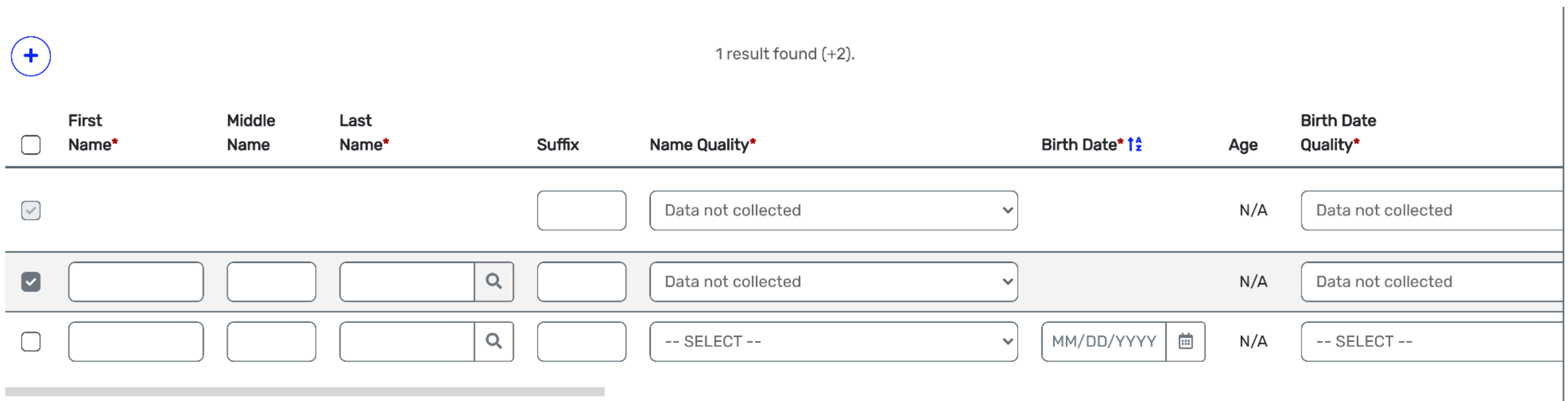
Basic Client Information Without Personally Identifiable Information – Basic Client Demographics

Step 8: Click “Finish” on the bottom right side of the page. ClientTrack will navigate to the “Family Members” workflow step in the enrollment workflow.

Step 9: If applicable, add any additional family members* without adding personally identifiable information** by using “Data not collected” where required by a red asterisk.

** For instructions on how to add family members, see Chapter 4: Client Workspace: Menu options, Folders, and Subfolders /Family Members in the "HMIS Basic User 2026 Manual".*

*** For information regarding Personal Identifiable Information (PII) and Client Consent and HMIS Release of Information, see Introduction/Client Rights and Responsibilities/Client Consent and HMIS Release of Information.*



Basic Client Information Without Personally Identifiable Information – Adding Additional Family Members

Step 10: Complete the workflow with any relevant information that does not collect personal identifiable information.

Deidentifying Clients with Personal Identifiable Information in HMIS

If a client no longer consents to have information in HMIS, do not attempt to di-identify a client. Have a client or the identified member (if adult) sign a revocation of consent form* and reach out to hmis@changinghomelessness.org. The HMIS administration team will ensure the client's PII is deidentified properly.

**For a copy of the HMIS Client Revocation of Consent Form, please visit changinghomlessness.org and navigate to HMIS Resources, or reach out to hmis@changinghomelessness.org, and the HMIS team will send a copy.*