

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.

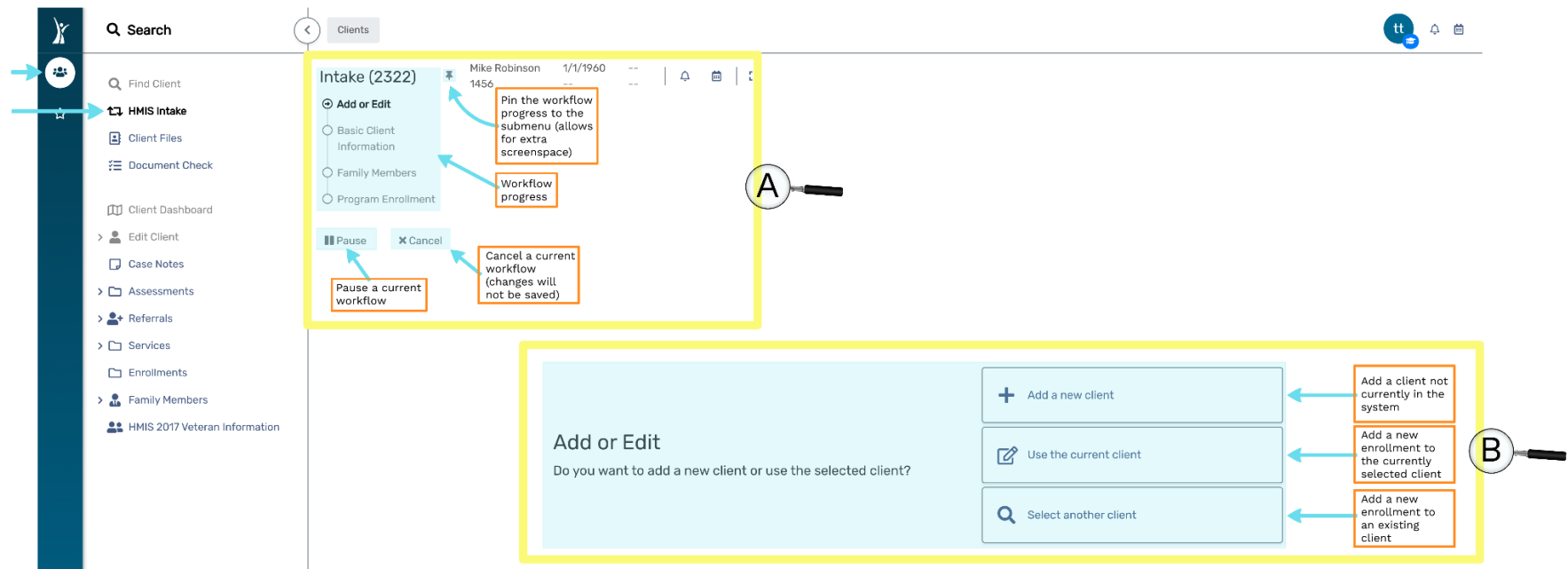
Steps to Intake a Client without Personally Identifiable Information

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

Basic Client Information

Search Existing Clients

Basic Client Information

Family Members

Program Enrollment

Pause

Cancel

Client Information

Please address the following:

⚠ Please review the list below for potential duplicates. Click [Next](#) if this is not a duplicate.

Search Existing Clients ⓘ

The first step in adding a new client is to search existing client records for possible matches to avoid duplicate entry. Enter partial identifying information on the client, and then click Next to search from existing client records.

- If the system finds no potential matches, you will be taken directly to Step 2.
- If the system finds potential matches, the search results will display below. If an accurate match appears, select and open that existing client record by clicking on that row.
- If there are no accurate matches, click Next again to continue to Step 2 in adding a new client record.

First Name: Last Name: Social Security Number: --Birth Date: MM/DD/YYYY

Displaying 1-100 of 1,574 results.

First Name	Last Name	Social Security Number	Birth Date
who	knew	110-00-021?	01/01/1960
Anew	Client	180-11-2222	01/01/1960
John	Smith	123-45-6789	01/01/1960

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

Clients

Intake (2322)

Basic Client Information

Search Existing Clients

Basic Client Information

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Pause

Cancel

Client Information

Basic Client Information

Complete the client's identifying information. Name and social security number have associated data quality fields. Data quality fields are used to indicate the reason full information wasn't collected. Name and social security number data quality fields allow users to indicate when a client doesn't know or refuses to provide information. If the required data is collected then ClientTrack automatically records that full data quality was met.

First Name:

Last Name:

Middle Name:

Suffix:

Name Quality: * -- SELECT --

Social Security Number:

SSN Quality: * -- SELECT --

Full name reported

Partial, street name, or code name reported

Client doesn't know

Client prefers not to answer

Data not collected

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”.

Intake (2322) | Search Existing Clients | Basic Client Information | Family Members | Program Enrollment | Pause | Cancel

Client Information

Basic Client Information

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Name Quality: * Data not collected

Social Security Number: [] [] []

SSN Quality: * ☐ Client doesn't know ☐ Client prefers not to answer ☒ Data not collected

Basic Client Information Without Personally Identifiable Information – Social Security Information

Step 7: **Basic Client Demographics –**

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

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

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

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

Client Information



Basic Client Demographics

Client Age: N/A

Date of Birth Quality: *

- ☐ Full DOB Reported
- ☐ Approximate or Partial DOB Reported
- ☐ Client doesn't know
- ☐ Client prefers not to answer
- ☒ Data not collected

Race and Ethnicity: *

- ☐ Native Hawaiian or Pacific Islander
- ☐ White
- ☐ Client doesn't know
- ☐ Client prefers not to answer
- ☒ Data not collected

Additional Race and Ethnicity Detail:

Gender: *

- ☐ Questioning
- ☐ Different Identity
- ☐ Client doesn't know
- ☐ Client prefers not to answer
- ☒ Data not collected

Veteran Status: *

ⓘ

Show Address and Contact Information: ☐ ⓘ

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.

+

1 result found (+2).

	First Name*	Middle Name	Last Name*	Suffix	Name Quality*	Birth Date* <small>↑↓</small>	Age	Birth Date Quality*
<input type="checkbox"/>					Data not collected		N/A	Data not collected
<input checked="" type="checkbox"/>					Data not collected		N/A	Data not collected
<input type="checkbox"/>					-- SELECT --	MM/DD/YYYY <small>📅</small>	N/A	-- SELECT --

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 changinghomelessness.org and navigate to HMIS Resources, or reach out to hmis@changinghomelessness.org, and the HMIS team will send a copy.*