

Client Files: Finding and Creating – HMIS Entry Instructions



1.0 Overview

Step-by-step instructions for locating an existing client within the WellSky system or creating a new client record if the client does not already exist. Before creating a client record in WellSky, the system requires users to search the system to make sure the client doesn't already exist. If a file for a client already exists, **always** use the existing file instead of creating a new one.

2.0 Work Instructions

1. Searching for a Client

- Navigate to the "ClientPoint" module.
- Use the Name search boxes to enter the client's name.
- Select "Search."

Note: You may also use "Client ID #" box to be navigated directly to a client profile

1.1 Tips for Effective Searching

- Search any fields un-italicized.
- Search with initial letters of names to widen your search.
- If a client has two last names try searching each one separately.
- If a file does not come up, ask the Client if they have any other names or nicknames, and search for those names.
- Try searching for alternate spellings, or just a few letters from the first and last names.
- Sort by clicking on columns to find clients easily.

1. Searching for a Client

Client Search

Please Search the System before adding a New Client.

Name: First: Middle: Last: Suffix:

Name Data Quality:

Alias:

Social Security Number:

Social Security Number Data Quality:

U.S. Military Veteran?:

Exact Match:

Client Number:

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #:

| ID | Name | Social Security Number | Date of Birth | Alias | Gender | Banned | Household Count |
|-----|----------------------|------------------------|---------------|-------|--------|--------|-----------------|
| 71 | Ackbar, Gial | 758-67-6888 | 07/08/1980 | | | | 1 |
| 51 | Bashir, Julian | 843-84-9348 | 04/23/1980 | | | | 1 |
| 162 | Bates, Norman | | | | | | 0 |
| 89 | Bays, Anne | -0002 | 04/12/1966 | | | | 1 |
| 106 | Beatty, Warren | | | | | | 0 |
| 181 | Brown, Frank | -4444 | | | | | 0 |
| 211 | Burke, Pat | -8989 | 05/05/1999 | | | | 1 |
| 212 | Burke, Pat | -8989 | | | | | 0 |
| 82 | Kenobi, ObiWan | 138-47-8373 | 08/13/1950 | | | | 1 |
| 81 | Rebo, Max | 238-40-5948 | 04/02/1980 | | | | 1 |
| 96 | wajkdka, dajajfdioqw | | | | | | 0 |

Showing 1-11 of 11

Client Files: Finding and Creating – HMIS Entry Instructions



2. Create a new client file if none exists

- a. Fill out the rest of the fields, Including the Data Quality questions
- b. Ensure data entered is accurate to prevent duplicates.
- c. Do not click **Exact Match** unless the client's name is a codename containing numbers.
- d. Select “Add New Client with This Information” button. Unless you have already searched for a client, you will not be able to click this button.

2. Creating a new client file if none exists

Client Search

Please Search the System before adding a New Client.

| | | | | |
|-------------------------------------|--------------------------|--------|------|--------|
| Name | First | Middle | Last | Suffix |
| Name Data Quality | -Select- | | | |
| Alias | | | | |
| Social Security Number | | | | |
| Social Security Number Data Quality | -Select- | | | |
| U.S. Military Veteran? | -Select- | | | |
| Exact Match | <input type="checkbox"/> | | | |

Search Clear Add New Client With This Information

3.0 Resources

3.1 Referenced Material

- [2024 HUD Data Standards](#) (linked)

3.2 Related Material

- [2024 CoC Program HMIS Manual](#) (linked)

3.3 Contacts

- HMISAdmin@clackamas.us