Entry Assessment Tips - Work Instructions

1.0 Overview

All questions in assessment must be answered. If an answer is already populated, it has "rolled forward." Ensure this answer is still current and accurate.
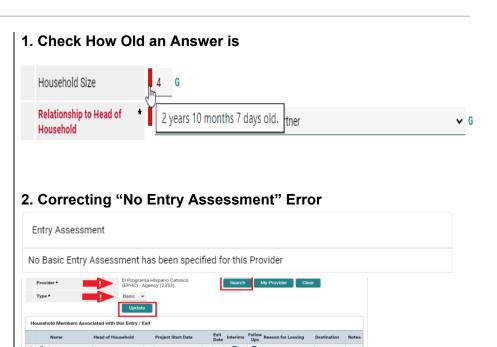
2.0 Work Instructions

1. **Check How Old an Answer is**
   a. Hover mouse over answer to see how old answer is.
   b. Colors indicate the age of answers as well.
      - Green = New
      - Red = Old
   c. Regardless of age of answers, you must ask question to ensure accuracy as of your project start date.

2. **Correcting "No Entry Assessment" Error**
   a. This error means you picked the wrong assessment or assessment type.
   b. Scroll to top of assessment, change provider or "Assessment Type," select update.
   c. Once you have the correct assessment, type for provider, questions will load and you will be able to complete assessment.

1. Check How Old an Answer is

2. Correcting "No Entry Assessment" Error

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3.0 Best Practices

3.1 Guidelines for "Data not Collected"

Do Not Select "Data Not Collected"
- This option is present in many HMIS dropdown menus but choosing it leads to reporting errors.

Mandatory Questions
- All questions in your assessment are essential for your project.

Unable to Collect Information?
- If information collection was not possible, leave the response set to "Select" instead of choosing "Data Not Collected."

3.2 Guidelines for Assigning Head of Household

Primary Client as Head
- Designate your main client as the Head of Household.

Single Individuals
- Identify as self. Include them in the Households tab.

Adult Pairs without a Primary
- Choose one to label as the Head of Household.

3.3 Guidelines for Client Demographics

First and Last Name
- **Requirement**: Every client must have both a first and last name recorded.
  - Record full first name used by client. Preferred name is acceptable over legal name unless funder requires legal name.
- **Data Quality**: Ensure "Full Name Reported" is selected for Name Data Quality.
- **Updating Details**: Modify Name and Name Data Quality in the Client Profile tab under ClientPoint.
  - Tip: Teams doing Street Outreach and Coordinated Entry projects can start by recording basic info about a client. As they work with clients, they can update and correct details in HMIS to make sure info is accurate and complete.

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Date of Birth (DOB)
- **Mandatory DOB**: A DOB is required for all clients. Those lacking a full or estimated DOB will be removed.
- **Estimation**: If unknown, estimate the DOB.
  - Tip: Inquire about the client's age or age range for estimation.
  - Use the format 01/01/YYYY for entering estimated DOBs.
- **DOB Data Quality**:
  - DOB provided: Choose "Full DOB Reported."
  - Estimated DOB: Select "Approximate or Partial DOB Reported."
  - Use "Client doesn't know" rather than "Approximate or partial DOB reported" if the client did not know their date of birth within one year.

Social Security Number (SSN)
- **SSN Inquiry**: While clients are not obliged to provide their SSN, it is mandatory for providers to request it.
- **Data Quality Options**:
  - Last 4 digits only: "Approximate or Partial SSN Reported."
  - Full SSN provided: "Full SSN Reported."
  - Client Refusal: "Client preferred not to answer."
  - Client Unaware: "Client doesn't know their SSN."

Race and Ethnicity
- **Self-identified** race and ethnicity are always respected and honored as reported.
- No documentation is required to verify a client's response.
- If the client does not know their race or ethnicity, or prefers not to disclose it, use "Client doesn't know" or "Client prefers not to answer".

3.4 Guidelines for Updating Client Contact Information

Frequency of Updates
- Client contact information must be refreshed if it's older than 6 months, when possible.

Changes Within 6 Months
- For information less than 6 months old that has changed, close the existing contact record and create a new one with the updated details.

Client's Current Residence
- **Definition:** Reflects the actual location where the client is currently sleeping, staying, or living.

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- **Clarification:** This refers to the physical location of the client's current accommodation, not the location where services are received.

3.5 Guidelines for HUD Verification and Household Information

HUD Verification Requirements
- **Adults and Heads of Household**: Complete all HUD Verification tables and related questions for every adult (age 18+) and any Head of Household, regardless of age.
- **Children Under 18 (Not Heads of Household)**:
- **Required**: Only Disabilities and Insurance sections need completion.
- **Income**: Record any income for children under 18 on an adult member's assessment, not on the child's.

Household Information
- **Household Size**: Note the total number of people living in the household.
- **Household Income**:
    - **Self-Reported Standard**: Income is self-reported unless part of a housing program or project that necessitates income verification.
    - **Monthly Total**: Document the total household income for the previous 30 days. This figure is not an annual estimate.
- **Income Levels**:
    - **Federal Poverty Level (FPL)** and **Percent of Median Family Income**: Available on the Clackamas County website.
    - **Area Median Income (AMI)**: Available on the Clackamas County Website.

4.0 Resources

4.1 Referenced Material
- 2024 HUD Data Standards (linked)

4.2 Related Material
- 2024 CoC Program HMIS Manual (linked)

4.3 Contacts
- HMISAdmin@clackamas.us (linked)

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