1.0 Overview

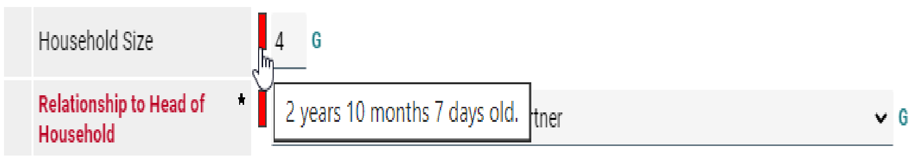
All questions in assessment must be answered. If an answer is already populated, it has “rolled forward.” Ensure this answer is still current and accurate.

2.0 Work Instructions

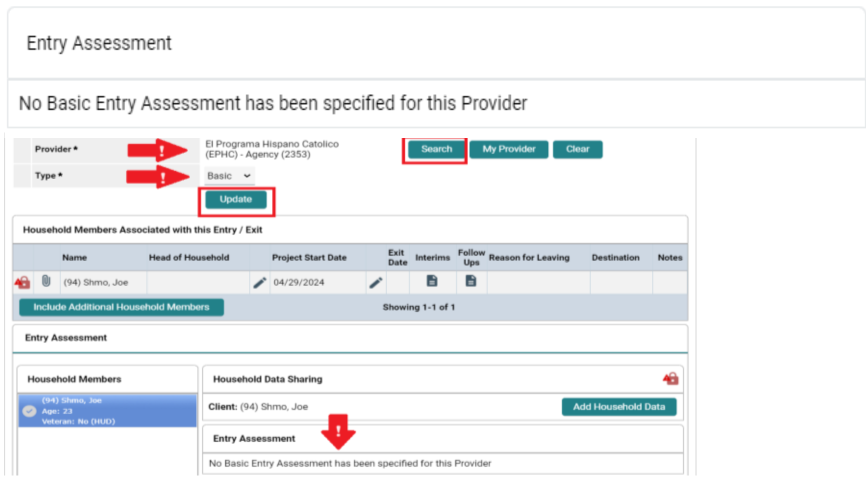
1. **Check How Old an Answer is**
   a. Hover mouse over answer to see how old answer is.
   b. Colors indicate the age of answers as well.
      - Green = New
      - Red = Old
   c. Regardless of age of answers, you must ask question to ensure accuracy as of your project start date.

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



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."

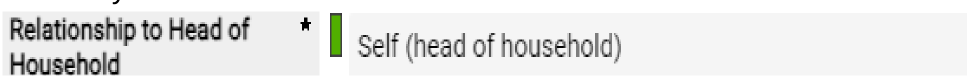
3.2 Guidelines for Assigning Head of Household

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.
- **Limited Data:** If a client consents to you recording their information in HMIS but does not want their name to appear in the database, or if you believe that a client’s safety could be threatened by having their name in the system, enter the following:
  - *First Name*: **Anonymous**

        - Add **Adult 1** for the head of household, and **Adult 2**, **Adult 3**, etc. for other adults in the household (*cont. below)*
            - Example: "**Anonymous Adult 1"**
        - Add **Child 1**, **Child 2**, etc. to the first name of each minor child in the household.
            - Example: "**Anonymous Child 1"**
    - *Middle Name*: Client's middle initial (if applicable)
    - *Last Name*: For the Head of Household, either change to the client's HMIS ID Number, or (if creating a new client record for someone not yet in HMIS) enter the last name as Anonymous, create the new client record, and then change the last name to the new HMIS ID Number on the Client Profile tab.
        - For other household members, you will enter/change their last names as/to the HMIS ID Number of the Head of Household.

Date of Birth (DOB)

- **Mandatory DOB**: A DOB is required for all clients. Those lacking a full or estimated DOB will be removed.
- **Limited Data**: If the exact date of birth is unknown, if the client requests to not include their personally identifiable information (PII) in HMIS, or if program staff believe that including a client's PII in HMIS could jeopardize the client's safety, do the following:
    - Inform the client that you can put them in with a randomized DOB if they would prefer.
    - Ask the client for their age or the year that they were born.
    - Use the format [Month of data entry]/[Day of data entry]/[The client's actual birth year, or a year estimated based on the client's current age]
        - For example: If you are speaking with a client born in 1988 who does not want to enter their PII on HMIS on the 28th of August to enroll them in my housing program, you would enter their date of birth as 08/28/1988
- **DOB Data Quality**:
    - DOB provided: Choose "Full DOB Reported."
    - Estimated or Limited Data 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 prefers not to answer."

- Client Unaware: "Client doesn't know."

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".

Gender

- **Self-identified** gender is always respected and honored as reported.
- No documentation is required to verify a client's response.
- If the client does not know their gender, 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.
- **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**:
    - **Percent of Median Family Income** can be found (after you've determined a client's household's yearly total income) on this Clackamas County website: https://www.clackamas.us/housingauthority/section8.html
    - **Level of Family Income (%HHS Guidelines)** asks you to compare the client's household's annual income to the federal poverty level. Information to answer this question can be found at this site: https://www.healthcare.gov/glossary/federal-poverty-level-fpl/

4.0 Resources

4.1 Referenced Material

- 2024 HUD Data Standards (linked)
- HCDD HMIS Limited Data and No Share Policy (not yet linked)

4.2 Related Material

- 2024 CoC Program HMIS Manual (linked)

4.3 Contacts

- HMISAdmin@clackamas.us (linked)