Data Entry Guide Apricot 360 Lake County-Update March 2021

Contents

Glossary	3
Logging In	4
Note About Management Information Systems	5
Workflow Example	5
Home Screen	6
Select a Site and Program	6
Search for Records & View Your Data	7
Get Help and Read Documentation	7
About Workflows	7
HMIS Full Workflow	8
Client Document Folder	8
Program Enrollment Header	8
HMIS Required Assessments	9
HMIS Custom Workflows 1	0
Functionality Detailed 1	1
Login – Home Screen (Dashboard)1	1
Search Records1	1
Individuals1	2
Households	2
Creating a Household Record1	2
Link Individuals to Household1	3
Linking an Individual to a Project 1	3
What is a Project Enrollment? 1	3
Creating the Project Enrollment1	4
Completing Assessments 1	5
Data Collection Stages1	5
HMIS Assessment1	5
Income, Non-Cash, Health Insurance1	7
Adding Income Information1	7
Adding Non-Cash Benefit Information1	7
Viewing and Editing Records1	8
Generating a Report 1	9
Search Individuals	0
Creating an Individual Lake County CA, Apricot 360 HMIS User Guide March 2021	1

Creating the Project Record	2
Viewing and Editing a Record	3
Generating a Report	3
Supplemental Data Entry Guide - Project Roomkey	5
Roomkey Referral	5
Custom Form (Roomkey)	6
Data Collection Forms March 31, 2021	7

Lake County HMIS

This instruction manual has been created as a guide for basic Apricot 360 Homeless Management Information System (HMIS) User data entry. The steps described herein include a basic HUD data entry process as well as providing an example of local customization. There may be occasions where your agencies have many different types of projects that will utilize a modified data collection and entry process. Your HMIS Agency Administrator will be the information source for those instances.

This guide is intended to acquaint users with basic navigation and entry processes of the Apricot 360 HMIS platform and adheres to information contained the <u>most current version</u> of the HUD HMIS Data Manual.

Fraguently Used	Definition
Torms	Definition
Terms	
Continuum of Care	A community-wide volunteer, non-legal entity charged with promoting access to homeless
(CoC)	services and assuring the best utilization of mainstream government funded nomeless service
	programs. The CoC is also charged with working to optimize self-sufficiency among
Creation	nousenoids experiencing nomelessness.
Custom	Locally created assessments, forms and reports that enhance the management of the CoC's homeless system of care
Document Folder	A screen in Apricot that lists all types of service activity for a client such as HMIS
	Enrollments, client contact records, housing readiness documents, service records etc.
HMIS	the HMIS Administrator may be one or several staff persons who work for the HMIS Lead to
Administrator	administer the system. Aka, the 'Admin', that person or team is responsible for administering user training, monitoring data quality, being the subject matter expert for HUD HMIS
	regulatory and sub-regulatory guidance and assisting participating agencies to generate
HMIS Data Manual	A technical document created to guide HMIS and users and administrators in regard to data
Thing Data Manual	collection and entry. Guidance is undated every other year and includes instructions from
	various federal partners such as Health and Human Services and the Veteran's
	Administration Program sources collected in an HMIS include HOPWA RHY RHSAP
	GPD. SSVF and PATH
HMIS Lead	An entity designated by the Continuum of Care to manage the HMIS to its highest and best
	local use
HMIS Participation	Number of homeless service agencies and programs available in the CoC region that collect
_	and enter data into the HMIS. The participation rate is the number actively engaging in the
	HMIS divided by the total number of service agencies (including volunteer and faith-based
	groups)
HUD	Federal Department of Housing and Urban Development
Linking	Different assessments/forms may follow a prescribed workflow by linking different types of
	Apricot forms in a chronological progressions
Permissions	Granular settings that govern specific assessments, forms, reports and bulletins an HMIS user
	may have access to view, create, edit or archive
Project Type	
Record	A record is a collection of similarly typed database fields and in a spreadsheet are represented
	as Rows. For example a Client records contains field information about a person that
	typically will not change such as their name, date of birth, SSN, race and ethnicity. An
	enrollment record contains information about a particular instance of an enrollment such as
	the client's start date, end date, data collection stage and household relationship to that
	enrollment.
Record ID	A unique numerical identifier databases use to uniquely identify and link different types of
	Records together (i.e. Programs to Sites, Assessments to Clients etc)

Glossary

Site/Program	Site equates to a nonprofit agency or local government business unit; programs are
	individually funded projects related to each Site
Workflow	A series of process steps to be followed for different types of data entry actions in the HMIS

Version History (this document)

Version 2.0	March 31, 2021	Guide updated to reflect new workflows, assessments and customizations added
Version 1.0	June 30, 2020	Guide released with basic screen shots and data entry steps

Logging In

After HMIS training you will receive your temporary login credentials to the Lake "live" site from HCD. You will need to create a new permanent password. Passwords must:

- be at least five (5) characters
- contain at least one number 0 through 9
- contain at least one non-alphanumeric character
- contain no spaces

Note: Must be of a strength of medium or higher. Therefore, passwords cannot contain words such as "password" or "test" as these are considered of a low strength

Passwords in Apricot 360 are set to expire every 45 days due to inactivity. Lake County Behavioral Health will notify the community if that date maximum changes.

To obtain a new login, email Melissa.Kopf@lakecountyca.gov. Passwords for the "Lake Train" site are open for after-hours access using the credentials you received in training. The Lake Train Sandbox site is located at: <u>https://apricot.socialsolutions.com/auth</u>

Note About Management Information Systems

The value of an information system such as Apricot 360 versus using a basic spreadsheet is the system's ability to track the relationship between different types of data. In Apricot 360, these relationships are referred to as "Links." There are many different types of data that will be tracked, but to illustrate this point observe the diagram below. A single household has 3 individuals linked to it, 5 project enrollments and 7 assessments. This household's structure is further complicated by the fact that the household composition changes, adding a third member (perhaps the birth of a child or the development of a new relationship) in the second enrollment. These real-world changes are why we rely on a complex system for tracking and evaluating these changes.



Workflow Example

A workflow defines which steps are to be taken, and the order they are taken in. This manual focuses on most projects in your Homeless Response System which follow the order in the graphic below. However, you should check with your HMIS administrator to understand the workflow you need to complete for the projects you are working with because there are exceptions.

Standard projects should complete the following steps:



Home Screen

Once you login to Apricot 360 the home screen will present. Below are some of the key pieces of the home screen which you should familiarize yourself with.

apricet MY APRICOT Select Site & Location Program All Programs	CHANGE
Search Records Lake County Bulletins	COLLAPSE ALL
 Hidden Records My Apricot Tools Kalia - GREAT JOB! Kalia - GREAT JOB! Kalia - you are doing such a great job! Read bulletins Search for records & view your data 	LakeCo Bulletins
Get help, read documentation	
 COVID Resources Customer Care Help Center Submit an Idea 	Q

Select a Site and Program

Before entering data, users must select the site and project they wish to enter data for. To select a site and project, click the 🖍, scroll down until you see the project you wish to select.

Note: users should see only the Sites/Programs listed that they have been granted access to via the Permissions functionality by the HMIS Administrator.

Search for Records & View Your Data

The primary navigation menu is located in the upper left corner of the screen. Users are able to utilize this menu to search for records, view hidden records and access My Apricot Tools including the library of canned reports.



Get Help and Read Documentation

On the bottom portion of the left-hand navigation pane, you can access additional resources. These resources include time limited or situational information such as those for systematic response to the current pandemic caused by the novel coronavirus, COVID-19 and non-time limited resources such as Customer Care, Help Center, Submit and Idea and the Resource Center.

Resetting Your Password

The Resource Center also allows you to reset your password by selecting Resource Center \rightarrow New User Guides \rightarrow Resetting Your Password.



COVID Resource

Customer Care

💡 Submit an Idea

Resource Cente

About Workflows

Workflows are a sequence of processes through which a piece of work passes from start to finish. All software platforms have workflows and an HMIS may have common workflows determined by HUD or the State of California, but a CoC may conceive of and create its own unique workflows that incorporate data collection for locally determined needs.

Most funded projects in the Lake County Continuum of Care will adhere to a full or native HUD HMIS workflow. Some projects will complete an additional custom workflow in addition to the core HUD requirements. Important Note – HMIS Users should have a clear understanding of HUD Data Collection States per the most current <u>HMIS Data Standards (aka HMIS User Manual</u>). All HMIS Users should plan a thorough review of the standards every time HUD provides and update. Contact the Lake County HMIS Administrator for details.

Workflows for each project type shall be first be determined by the terms of the primary funding source (i.e. State of CA) and from there additional expectations at a local level.

Local funding agreements(contracts) shall adhere and expose both the primary funding instructions received from the Federal or State funding sources and any additional data collection expectations. Identified contract administrators in Lake County are the key information source for the terms of an HMIS projects data collection and entry rules.

HMIS Full Workflow

A full or native HMIS workflow will complete the following process steps and assessment Apricot 360 forms (detailed completion steps further in document).

Quick Steps:

- 1. Search or Add Client Search Records, if Client not located, Add a new Client
- 2. Add/Confirm Household Households of more than one person <u>and</u> every single individual MUST have a household record with relationship of Self Head of Household. For multi-person households there must be at least one individual assigned a relationship of **Self Head of Household**.
- 3. Program Enrollment once a client is selected, navigate to there he Document Folder
- 4. Add HMIS Assessments (March 2021 there are two separate assessments, but Vendor working on combining into one)

Disabilities and 3.917 – one each for the data collection stage of Entry and one for Exit **Health Insurance, Income and Non-cash Benefits** - one each for the data collection stage of Entry and one for Exit

Note, that each data collection stage is typically completed one at a time. For instance, a client is enrolled in a shelter program on March 1st, so the Enrollment header, and HMIS Assessments align with the Entry data collection stage. At a later date when the client exits the program, an Exit Date is entered in the Program Enrollment Header and another set of HMIS Assessments are added with the Information Date in each form being the same as the Exit Date.

Client Document Folder

HMIS Project Enrollment (2 rec	cords)	First enrollment has a c showing an Exit Date	omplete record		X 🗈 🕂
LINKED HMIS PROJECT (ONE PERMITTED)	CLIENT'S AGE AT ENROLLMENT (VIEW ONLY)	PROJECT (Second enrollment is in with NO exit date	en 'open' state (ENROLLMENT) EXIT DATE (3.	1) RELATIONSHIP TO HEAD OF HOUSEHOLD (THIS ENROLLMENT) (3.15)	PROJECT TYPE (AUTO POPULATES FROM LINKED PROJECT)
<u>1 Link</u>	39	08/21/2019	03/15/2020	Self (head of household)	PH - Rapid Re-Housing
<u>1 Link</u>	40	03/16/2020		Self (head of household)	PH - Rapid Re-Housing

Program Enrollment Header

(Note the following screen shots reflect a fully completed HMIS Enrollment record

- Linked Project
- Enrollment and Exit Dates
- Client's relationship to this Enrollment

• Subform showing the Household

Step 1) Project Enrollment/Exit Detail 🕶									
*Linked HMIS Project (O	ne permitted) 📀								
							🛃 Hi	ide Deactiva	ited Links 🛛 🕂 Add
HMIS Project Information	(Linked to Program) 3	3				Link	Info		
Project Name 🛸		Pr	oject Type 2.02.6 🛸		Target Population 2.02.8 🏊	Activ	/e 🔽	Delete [)ate 落
NCO - New Digs RRH (ES	G)	P	PH - Rapid Re-Housing		NA: Not applicable		2	Ē	Added on 05/21/2020
		То	otal Active Links:1, Total Dea	ctivated Links:0, Current	Active Links:1, Current Deactivated Links:0				
Client's Age at Enrollme	nt (View Only) 🔒								
39									
*Project (Enrollment) Sta	art Date (3.10) 🚱]			
Project (Enrollment) Exit	t Date (3.11) 🚱								
03/15/2020					Completed Enrollment header as indicated by				
Housing Move-in Date (PH Projects Only) (3.2	20) 🚱			an Exit Date and an attached Household				
08/21/2019									
*Relationship to Head of	f Household (this Enr	rollment) (3.15) 🚱		/					
 Head of household' Head of household' Head of household' Other: non-relation Data not collected 	's Child 's spouse or partner 's other relation memb member	ber							
CA-529	ion) (2.03) 🐨								
*Funder/Grant Source (2	2.06) 🚱								
HUD:ESG-Rapid Rehou	sing ►		/						
1. SAVE the Enrollme	nt record								
2. Click "Continue" o	n the popup wind	low when promp	ted						
3. Verify Household N	Vembers								
4. Complete the requ	uired HMIS Assess	ments							
Linked Household Info (Expand To View Enrollment Members and Relationships) 🔒 😡									
			/					[Hide Deactivated Link
Household Records		Link Info							
		Household Name	2	Links To and Co	unts of Hous 🔽	Act	ive 🔽	Delete	Date 🛸
Þ	8			4 links				Ū	Added on 05/21/2020
		То	tal Active Links:1, Total Dea	ctivated Links:0, Current	Active Links:1, Current Deactivated Links:0				

HMIS Required Assessments

(Note the following screen shot reflects a fully completed HMIS Assessment requirement)

- Enrollment ID column is the same number for all rows
- Information Dates match the Entry and Exit dates in the Enrollment header
 - HMIS Homeless Status (3.917) and Health/Disabilities (both entry and exit completed and saved)
 - HMIS Health Insurance, Income and Non-Cash Benefits (both entry and exit completed and saved)

Ste •H	ep 2) HMIS Required Assessments (Linked) ▼ MIS Homeless Status (3.917) and Health/Disabilities ◎	Complete set of HMIS Assessments, a pair fo Project Entry and a Pair for Project Exit	with				
					Hide Deacti	vated Links	+ New
н	MIS Client Homeless Status 3.917 and Disabilities		Link Info				
	Project Link (Required and 🐾	HMIS Data Collection Stage 🛸	Information Date (5.04) 🏊	Enrollment ID 🏊	Active 🛸	Delete	Date 🔽
	PH - Rapid Re-Housing - HUD:ESG-Rapid Rehousing (12488) - Start 2019-08-21 - End 2020-03-15	Project Exit	03/15/2020	12488		Ē	Added on 07/20/2020
	PH - Rapid Re-Housing - HUD:ESG-Rapid Rehousing (12488) - Start 2019-08-21 - End 2020-03-15	Project Entry	08/21/2019	12488		Ū	Added on 05/21/2020
*H	MIS Health Insurance, Income and Non-Cash Benefits @		Link Info		✔ Hide Deacti	vated Links	[+ New
	Project Link (Required and 🔽	HMIS Data Collection Stage 🍡	Information Date (5.04)	Enrollment ID	Active 🐪	Delete	Date 🔽
	PH - Rapid Re-Housing - HUD:ESG-Rapid Rehousing (12488) - Start 2019-08-21 - End 2020-03-15	Project Exit	03/15/2020	12488		Ē	Added on 07/20/2020
	PH - Rapid Re-Housing - HUD:ESG-Rapid Rehousing (12488) - Start 2019-08-21 - End 2020-03-15	Project Entry	08/21/2019	12488		Ē	Added on 05/21/2020
S/	Total Active Links:2, Total Deactivated L	inks:0, Current Active Links:2, Current	Deactivated Links:0				

HMIS Custom Workflows

HMIS platforms are generally designed off of existing software platforms that have earlier roots in the nonprofit service or healthcare world. Some HMIS' are more configurable than others and Apricot 360 is one of the most customizable software systems available.

The CoC can use the custom form and workflow rules features to create tracking and reporting for local use. In a case where reporting mandates do not specify a particular report of format, a customization can be considered that creates less of a user burden.

One of HUD's strongest desires is to have as many programs serving local homeless persons participating in the HMIS as possible, this is not dependent on funding types. Custom data entry flows and forms can attract non-federal or state program services to enter their data which builds a better system-wide picture of homeless in a CoC region.

Custom forms and data flows may be linked through Apricot's workflow rule feature before, during or after the HUD processes. Custom forms may also be designed and completed completely outside the HUD workflow, meaning a certain project may not need to complete the program enrollment steps. The Lake County HMIS Administrator will advise agencies around the workflows needed for each project's setup.

Examples can include warming centers, safe parking, food distribution sites and more that may be funded with flex or general funds.

Current custom assessments/form created and populated in the Lake County Apricot HMIS include:

Client Contacts - tracks different contacts a client may have such as parent, sibling, housing navigator

Client Documentation – tracks various pieces of documentation a client may need to become housing ready

ESG-COVID – HUD recommended C19 diagnosis and vaccination tracking

HEAP Service Payments - service payment custom form

Lake County PIT (Imported) – Point in Time clients imported to the HMIS who were not previously in the system

Warming Center Participants – a simple roster of clients presenting for assistance at the Warming Center in 2019

Custom forms may have reports created or specific data elements pulled for the data they collect but if they are completed individually, will not generate the standard compliance reports such as the CAPER or APR.

Functionality Detailed

Login – Home Screen (Dashboard)

The <u>Home Screen</u> section of this manual provides a look at how that screen appeared when Apricot was new, the screen show below shows how that screen has been developed. Key elements of the screen are as follows:

Top Menu – Menu stack (open/close navigation, Site/Program selection, User Account Information) User Navigation Menu (left vertical black bar) Bulletins – Announcements created and maintained by HMIS Administrators Upcoming Site Dashboard – Custom reports and/or data pulls that may be created and attached by HMIS Administrators

Search Records

One of the first things you will most often do after logging into Apricot 360 is to search for a Client or Household record. After clicking on Search Records on the left nav area, the navigation menu on the left side of the screen (pictured above) allows you to specify if you are searching for an individual or a household level record.



Households

Households are organized by the name of the head of household as determined the first time a household presents for services.

Tip: If the household you are looking for is not found in your initial search, try using the names of other adults in the household.

To locate an existing household record, click 'Households' on the left navigation menu. The default search option that appears will allow you to search by the Household Nickname. You can also choose to search by Record ID, or Creation Date.

Tip: Notice that as you enter information, the information system immediately begins searching and records which are not an exact match are eliminated. If you are unsure of the household

nickname, you can enter a "%" which is known as a wild card. If all adults in the household share

the same last name of "Johnson", but you are unsure who the head of household is, entering %Johnson will return all records with those letters in that order. Be sure to verify the Client Name, Social Security Number (SSN), and Date of Birth (DOB).

Individuals

To locate an existing individual record, click 'Individuals' on the left navigation menu. The default search option that appears will allow you to search by First, Middle and Last Name. You can also choose to search by Record ID, date of birth, gender and several other project enrollment focused elements such as enrollment start date, or assessment data such as 'Select Active or Recently Exited.' The search engine begins to narrow search results as you type into the search box.

Tip: The search engine is looking only for an exact match. To avoid missing a valid result, enter in partial information, such as the first two to three letters of the first and last name. If you enter a full name, such as "Joseph Johnson" you will miss a result if this person was created as "Joe Johnson," or if there was a typo and they were created as "Joseph Johnsen." When searching for a match, ensure they are the person you are looking for by comparing the date of birth and social security number.

Once you locate the correct individual, you may either scroll down and click on the Name to proceed to their demographic information, or if you generate a list with multiple results, you can use the column headers to sort the data.

Clicking on the record will bring you to their demographics screen. To view the individual's other records, select 'view folder' from the right side of the screen.

Record Options 💌	
😫 Save Record	
Print Mode	
🛗 View History	
F New Individuals	
🕒 View Folder	
Go To Search	

Households

Note: All Clients must be attached to a Household.

If after attempting to locate an existing Household you are certain that the household is not in the HMIS, use the New Household button in the upper right corner of the <u>Search For Household</u> screen.



Creating a Household Record

From the Household screen, enter the name of the household using the first and last name of the head of household. Follow this naming convention, "FirstName LastName Household". Use the button on the right side of the screen to Save Record as prompted.

Household Information •		Save Record
*Household Nickname 🛛 🖏	Record ID 😡	Go To Search
FirstName LastNameTraining Household	- Creation Date	Record Save Checklist Required Field Checks
Lake County CA, Apricot 360 HMIS User Guide	March 2021	Heid Validation Checks ¥

You will see confirmation that a record has been created. Select 'Continue.' The system will generate a Record ID and a timestamp for the Created Date.

Link Individuals to Household

Record Saved Record created! Click anywhere to reload the page.

 Continue
 View Folder
 Go To Search

From the Household Screen, click the Add under "1. Link each member of the household" to add individuals to the household.

- Begin by searching using the form displayed. If you find the individual you are looking for, you can click their name, and it will link this person to the household. Note: The person will not display on the Household from immediately. You must save the form to see the new member display.
- 2. If the individual is not in the HMIS, you can create a new record by selecting, Create New located in the upper right corner of the pop-up window. Follow the instructions in the next section to complete adding a new individual record.

When the information has been entered, select Save Record from the right side of the screen. You will receive a confirmation that the record has been created, click 'Continue.' The system will generate a Record ID, a timestamp for the Created Date and show the link between this individual and their household.

If you have additional members to add, click on the household name and repeat the steps outlined in this section.

View Linked Households Records 🕶									
Li	Linked Households 🔒								
Ι.				×	1 Hide Dea	activated Links			
ŀ	lous	eholds	Link Info						
		Household Nickname	Creation Date 🏊	Link Program Enroliments to 🛸	Active	Date 🛸			
		FirstName LastNameTraining Household	05/31/2020 3:19 PM HST	0 links	2	Added on 05/31/2020			

Linking an Individual to a Project

What is a Project Enrollment?

A **project enrollment** is a container to hold all the information about an individual's assessments that occur in the time they are participating in the project. On a bookshelf, the enrollment would be the bookends. Between them are the assessments grouped by data collection stages.



A **data collection stage** simply refers to when the data were collected and to what the data refer. For example, entry assessments are collected when an individual enters a

project and describes their circumstances at entry: Where were they living? Do they have income? Do they have disabling conditions?

There are <u>four types</u> of data collection stages: Entry, Update, Annual and Exit. The section 'Completing Assessments' describes the role of these assessments and when to select each.

An enrollment can contain <u>as few as</u> a single data collection stage (if an individual has entered, been enrolled for less than a year, has had no changes since enrollment and has not yet exited). There is <u>no maximum</u> for the number of total data collection stages which can occur during an enrollment except there can be no more than one entry, and one exit. There will also only be one annual assessment for every 365 days a client is enrolled.

Creating the Project Enrollment

From the Individual Screen, select ^{Power Folder} from the right-hand menu. You can view all data associated with this client from this screen. To view and link new enrollments, select 'Links' from the top of the screen

DOCUMENT FOLDER OVERVIEW LINKS

From the upper right corner, select 'Create' to link a new enrollment.



From the next screen, Document Selection, click 'Program Enrollment'.

Tip: To view the individuals basic demographics from this form you can click

Quick View Information located just below the header with the individual's name. This can be helpful to ensure you are working on the correct HMIS record and to confirm the basic information for this person.

FirstNameKid LastNameKid		
Quick View Information 🔻		
Client First and Last Name	FirstNameKid LastNameKid	
Alias or Street Name	Junior	
Lake County City	Clermont	
Full or partial SSN	XXXXXXXXX	
Date of Birth	01/07/2004	
Age in Years	16	
Veteran Status	No	
Creation Date	06/06/2020 10:57 AM HST	

Begin the new enrollment record by selecting F. New . Choose the project you want to enroll the individual in on the pop-up screen.

Add Search Field Project Name (HMIS Project Information (Linked to Program) 3) Soloo The following 2 HMIS Project Information (Linked to Program) 3 records matched		If your Agency has a large number of projects (programs) start the project name search with the percent sign to create a wildcard search that will show just the name matches that follow the %. Here the search is for anything that proceeds LCO.			1
Project Name 🛸	Project Type 2.02.6 🌤	anything that proceeds Loo		n 2.02.8 🐃	
LCOE - Children and Youth (HEAP)	Services Only		NA: Not applicab	le	
LCOE – College Student Housing	PH – Housing Only		NA: Not applicab	le	

After making your selection, close the window and complete the form (do not fill in exit date). Click Save Record.

	Links to be Added Upon Save
	NCO - New Digs Outreach (ESG)
E	nrollment Start Date 🚱
	06/06/2020 🛍 🛛 Defaults to today
En	irollment Exit Date 🚱
P	MM/DD/YYYY 🛅
'R	elationship to Head of Household 😡
(⊖ Self
(Head of household's child
(Head of household's spouse or partner
	Head of household's other relation member (other relation to head of household
(Other: non-relation member
's	elect Funder 📀
	- Please Select V
т	'his field is required.

Once the form is saved, the individual has been enrolled. Proceed to complete assessments by clicking Continue.

Completing Assessments

Now that the system knows when the individual started participating in the project based on the enrollment record, the system needs information about the individual's circumstances at entry, during the enrollment and at exit. These records are referred to as assessments. They are grouped into two categories, the HMIS assessment which collects data about their background, housing circumstances and history of homelessness and the Income, Non-Cash and Health Insurance Assessment.

Data Collection Stages

HUD projects mandate that data be collected in Stages – refer to the HMIS Data Manual for complete instructions on Data Collection stages for each project type. *Status @

- O Project Entry
- ⊖ Update
- O Annual Assessment
- O Project Exit

HMIS Assessment

Scroll down to the header which begins with 'Enrollment Start/Exit Assessments'. Click under HMIS Assessment.

Tips: Fields which are required to save this form are marked with an asterisk (*). Date fields must include separators, also known as a forward slash (/).

Enrollment Start/Exit Assessments - HMIS, Income, No	n-Cash Benefits, Health Insu 🔻
*HMIS Assessment @	V Hide Deactivated Links ∓ New
This field is required. *Income, Non-Cash Benefits and Health Insurance Assessment @	Z Hide Deactivated Links 🗜 New
This field is required.	

Click F New to create and HMIS Assessment.

- 1. Select the project enrollment you want to create an assessment for. All active enrollments will be displayed in the dropdown menu so take care to select the correct one.
- 2. Select the data collection stage, referred to here as 'Status'.
- 3. Complete the HMIS Background section. If the individual has any disabling conditions (physical or developmental disability, chronic health

Select Active or Recently Exited Enrollment 🖗 🧹 1
PH - Rapid Re-Housing - HUD:ESG-Rapid Rehousing (12/19) - Start 2020-06-05 - ACTIVE 🗸 Go
To Record
Information Date 💿
06/07/2020
Status 🖗 🔰 2
Project Entry
🔿 Update
🔿 Annual Assessment
O Project Exit

condition, HIV/AIDs, mental health condition, substance abuse problem) the answer to the first question <u>must</u> be 'yes'.

Tip: This section has questions that only show if questions are answered a certain way. This is why some responses result in additional questions populating.

*Disabling Condition Status	Note: If any disabling conditions below are 'yes', this field should be 'yes'.	
*Physical Disability Status @ Yes v	*If Yes for "Physical Disability" Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	
*Developmental Disability St	atus	
*Chronic Health Condition St	atus	
No *HIV/AIDS Status		
*Mental Health Problem Stat	us *If Yes for "Mental Health Problem" Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently @	
Yes 🗸	Yes 🗸	
*Substance Abuse Problem Status @ No	×	
*Domestic Violence Victim/Survivor	*When Experience Occurred	*Are you currently fleeing?

- 4. Complete the Prior Living Situation section. If you are unsure how to answer these questions, consult the HMIS Data Manual.
- 📙 Save Linked Record 5. Click to save the assessment record. You will be returned to the enrollment scree, so next proceed to the Income, Non-Cash and Health Insurance Assessment.

Income, Non-Cash, Health Insurance

Click To add a new Income and Benefits Assessment.

Tips: Fields which are required to save this form are marked with an asterisk (*). Date fields must include separators, also known as a forward slash (/).

*Select Active or Recently Exited Enrollment @ PH - Rapid Re-Housing - HUD:ESG-Rapid Rehousing (12719) *Information Date 🚱 06/07/2020 Project Entry

Prior Living Situation •

Homeless Situations

One night or less

*Type of Residence Prior to Project Entry 🕗

*Length of stay in prior living situation 🚱

 \mathbf{v}

 \sim

Adding Income Information

1. Select the project enrollment you want to create an assessment for. All active enrollments will be displayed in the dropdown menu so take care to select the correct one.

To Record

*Status 📀

O Update Annual Assessment O Project Exit

- 2. Select the data collection stage, referred to here as 'Status'.
- 3. Indicate if the individual has health insurance.
- 4. Select the insurance source by indicating 'yes' in the list provided. You must select 'no' for all insurance sources that the individual does not have. For a full list of response options, please reference the HMIS Data Manual.
- 5. Indicate if the individual has income from any source, this does not include non-cash benefits, which are collected separately.
- 6. Select the appropriate source of income (earned, retirement, disability benefits etc.). Once you select 'yes' for a source, an additional box will appear to record the amount of the income.



	Income and Sources •	
5	*Income from Any Source @	
	*Earned Income (i.e. Employment Income)	*Earned Income Monthly Amount (i.e. Employment Income)
6	Vo Yes	1500

Adding Non-Cash Benefit Information

- 1. Indicate if the individual has non-cash benefits (i.e. SNAPS, TANF childcare, TANF transportation).
- 2. Indicate the specific benefit source (for full list see the Appendix A, data collection form).



No

3. Click Save Linked Record	
-----------------------------	--



The steps outlined above can be used for any assessment type including exit.

Viewing and Editing Records

To review a project record you have already created, repeat the steps outlined in Search Individuals. Select the

individual you are looking for, click Folder from the right-hand menu. From the documents folder, click

 $^{\odot}$ next Program Enrollments (or other document types of the client may have) to view project records already linked to this individual.

All Documents			Expand Multiline	h Forms
Program Enrollments (1 re-	cord)			+
ENROLLMENT START DATE	ENROLLMENT EXIT DATE	SELECT FUNDER	PROJECT TYPE (AUTO POPULATES FROM LINKED PROJECT)	RECORD ID
06/05/2020		HUD:ESG-Rapid Rehousing	PH - Rapid Re-Housing	12719

Tip: If, in parenthesis it says (0 records) then no records have been linked to this individual.

Generating a Report

To generate needed reports, click 'My Apricot Tools' from the left-hand navigation menu.

Click the caret icon (the small black triangle) next to the report list you are interested in to see all options. Click again next to the report

you are interested in to see information such as who created the report and when it was last modified. To run the report,

select Actions on the corresponding line, and then select 'run.' You can also use this menu to print, export or edit the report.

Once you have run the report you can choose different filters and rerun it. To explore and utilized these options, select in a on the right-hand side of the screen, across from Filters. This will result in a pop-up window that provides filter options via a dropdown menu.

Actions v	
Run	
Print	
Export	
Edit	



After running the report, you can print, and adjusting filters (if

needed), you can edit, refresh all sections, view the report in a printer friendly format or in full screen mode. You can also export the data or reset the filters.

Note: Options may vary based on your individual user settings and report customization. Also compliance reporting for grant purposes may only be generate by the HMIS Administrator.

Report Actions 🔻		
🕞 Edit		
C Refresh All Sections		
🖶 Print Mode		
💾 Export		
💾 Full Screen		
🛱 Reset Filters		
🔦 Return to List		

Search Individuals

Prior to creating a new individual record, search HMIS Client list to determine if they already have already been setup in the HMIS. Users should not create new 'duplicate' client records, they should use a client who has already been created.

If you attempt to create a duplicated Client, you will see a duplicate message window. Return to the Client Search and attempt to relocate that client or contact the HMIS Administrator for assistance.

To locate an existing individual record, click 'Individuals' on the left navigation menu. The default search option that appears will allow you to search by First, Middle and Last Name. You can also choose to search by Record ID, date of birth, gender and several other project enrollment focused elements such as enrollment start date, or assessment data such as 'Select Active or Recently Exited.' The search engine begins to narrow search results as you type into the search box.

Tip: The search engine is looking only for an exact match. To avoid missing a valid result, enter in partial information, such as the first two to three letters of the first and last name. If you enter a full name, such as "Joseph Johnson" you will miss a result if this person was created as "Joe Johnson," or if there was a typo and they were created as "Joseph Johnsen." When searching for a match, ensure they are the person you are looking for by comparing the date of birth and social security number.

Once you locate the correct individual, you may either scroll down and click on the Name to proceed to their

demographic information, or if you generate a list with multiple results, you can use the column headers to sort the data, as shown to the right.

Clicking on the record will bring you to their demographics screen. To view the individual's other records, select 'view folder' from the right side of the screen.

Didn't find who you were looking for? Proceed to Create Individual.



Client First and Last Name

Creating an Individual

Creating a new individual record begins with completing their demographic form.

From the Search Screen, select 'New Individuals' from the right-hand menu

Complete the form shown in accordance with the <u>HMIS Data Standards</u> and locally required information.

Tips: Fields which are required in order to save this form are marked with an asterisk (*). Date fields must include separators, also known as a forward slash (/).

Descend (D)		Creation Date
Kecord ID 🐨		12/13/2020 1:28 PM HST
155		
*Client Full Name (middle not req.) (3.01) 🖉 🏷		Suffix 🥹
Middle		
*Name Data Quality (3.01.5) 😡		Alias or Street Name (3.01.5.2) 🖗
Full name reported		Notes
Partial street name or code name reported		1003
 Client doesn't know 		
 Client refused 		
Data not collected		
Residing in Current Lake County City (update if known) 😳		Years residing in Lake County (update if known) 🕗
Please Select V		0.1
*Social Security Data Quality (3.02.2)		
Approximate or partial SSN reported		
O Client doesn't know		
 Client refused 		
Data not collected		
*Date of Birth Data Quality (3.03.2) 😡		*Date of Birth (3.03) 😡
Full DOB reported		/1989
Approximate or partial DOB reported		
Client doesn't know		
Client refused		
 Data not collected 		
Current Age Calculation 🚱		
31		
*Gender (3.06) 😡		*Veteran Status (3.07) 🚱
Male		Yes V
*Ethnicity (3.05.1) 🥪		*Race (checking multiple values results in mixed Race) (3.04.1)
Non-Hispanic/Non-Latino 🗸		American Indian or Alaska Native
		🗌 Asian
		Black or African American
		Native Hawaiian or Other Pacific Islander
	If client has been recorded as	□ White
	 Information section becomes 	Client doesn't know
	visible here	Client refused
		Data not collected
Left Lake County Area 🚱		Notification Client Left Area 😡
Please Select V		MM/DD/YYYY I
General Client Note 🥹		Notification Client Deceased
		MM/DD/YYYY
Veteran Information to be completed if Veteran Status is Yes 🔻		



When the information has been entered, select Save Record from the right side of the screen. You will receive a confirmation that the record has been created, click 'Continue.' The system will generate a Record ID, a timestamp for the Created Date and show the link between this individual and their household.

Creating the Project Record

From the Individual Screen, select ^{Ceview Folder} from the right-hand menu. You can view all data associated with this client from this screen. To view and link project records, select 'Links' from the top of the screen

DOCUMENT FOLDER OVERVIEW LINKS

From the upper right corner, select 'Create' to link a new enrollment.



Or click the 'create' icon to the right of the Project Roomkey Data Collection Form.

All Documents	Expand Multiline	Q Search Forms	
+ Lake County - Project Roomkey Data Collection From (0 records)			→ 🗈
Program Enrollments (0 records)			+

Tip: To view the individuals basic demographics from this form you can click Quick View Information > located just below the header with the individual's name. This can be helpful to ensure you are working on the correct HMIS record and to confirm the basic information for this person.

RoomKey LastName

Quick View Information 🔻 🗸	←
Client First and Last Name	RoomKey LastName
Alias or Street Name	
Lake County City	4 years
Full or partial SSN	XXXXXXXXX
Date of Birth	01/07/1982
Age in Years	38
Veteran Status	No
Creation Date	06/14/2020 6:45 AM HST

Viewing and Editing a Record

To review a project record you have already created, repeat the steps outlined in Search Individuals.

Select the individual you are looking for, click ^{CView Folder} from the right-hand menu.

From the View Documents folder, click $^{\odot}$ next to Lake County – Project Roomkey Data Collection Form to view project records already linked to this individual.

E cake county - Project koonikey bata conection Pron	(necold)			•
REFERRAL/INTAKE DATE	WAS CLIENT FURTHER ENROLLED INTO THE ROOMKEY PROJECT	HOTEL/MOTEL NAME	DATE OF PROJECT ROOMKEY ENTRY	DATE OF PROJECT ROOMKEY EXIT
06/12/2020	Yes	The Lamplighter Inn	06/12/2020	06/14/2020

Tip: If, in parenthesis it says (0 records) then no records have been linked to this individual. Try searching for other households members if applicable, as the record may have been created under their name.

Generating a Report

To generate needed reports, click 'My Apricot Tools' from the lefthand navigation menu.

Click the 'carot' (the small black triangle) next to the report list you are interested in to see all options. Click again next to the report you are interested in to see information such as who created the report and when it was last modified. To run the report, select

Actions b on the corresponding line, and then select 'run.' You can also use this menu to print, export or edit the report. Once you have run the report you can choose different filters

and rerun it. To explore and utilized these options, select in on the right-hand side of screen, across from Filters. This will result in pop-up window that provides filter options dropdown menu.

A	
Actions 🔻	the
Run	une
Print	а _.
Export	V18
Export	
Edit	

а



Select a Report Below
Lake County Reports 🐳 🔰
LakeCo Project Roomkey Roster (BH)
Description:
Created by: Teddie Pierce on 05/09/2020 8:49 AM HST
Last Modified by: Teddie Pierce on 06/08/2020 4:42 PM HST
Last Run by: Teddie Pierce on 06/11/2020 5:16 AM HST
LakeCo Project Roomkey Clients 🕨
Lake County Sites 🕨
Lake County Programs 🕨
LakeCo HMIS User List 🕨
HMIS Client Count 🕨
LakeCo Program Enrollments 🕨
LakeCo Organizations 🕨

After running the report you can print, and adjusting filters (if needed) you can edit, refresh all sections, view the report in a printer friendly format or full screen mode, export the data, or reset the filters. **Note:** Options may vary based on your individual user settings.

Report Actions 🔻
Edit
2 Refresh All Sections
🖶 Print Mode
Export
😫 Full Screen
🛱 Reset Filters
< Return to List

Supplemental Data Entry Guide - Project Roomkey

This section has been included in the manual to provide users an idea of how workflow and forms customization outside the full HUD workflow can be designed.

Navigate to project site Lake County Behavioral Health.' This can be viewed along the top of the screen and changed by clicking the \checkmark and according to user permissions settings.

Site Lake County Behavioral Health Program LCBH-Project Roomkey (FEMA)

CHANGE

Roomkey Referral

Complete the Roomkey Referral Section with the referral/intake date (may differ from data entry date), Homeless Status at Referral and whether the client enrolled in the project. If the client <u>did not</u> enroll in the project, save the record by clicking <u>Save Record</u> on the right-hand side of the screen. The save will be confirmed, click <u>Continue</u> from the pop up window and end here.



If the client did enroll in the project, select 'yes' and continue.

Custom Form (Roomkey)

This section of the manual has been left in place to demonstrate the use of a custom data entry process that differs from the <u>full HUD</u> workflow.

Complete the data entry fields as they pertain to the household. For additional information about how to answer these questions please see

Once you have completed these questions, click Save Record on the right-hand side of the screen.

The Save will be confirmed, click Continue from the pop-up window and end the data entry.

Image: state of the state	"lotal Adults I	1 Household
Total Children in Household 0 Service Animal/Pets Yes Yes Access/Functional Needs Identified Yes Additional Access or Needs Comments Needs interpreter If not homeless, does the participant have the ability to self-isolate or quarantine w/o assistance No Yes If not homeless, does not require hospitalization No Yes Asymptomatic but "high-risk" Yes Sufficient Documentation Received Yes Date Documentation Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel Hotel/Motel Name The Lamplighter Inn ▼ Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 ▼ Date of Project Roomkey Entry	1	
0 Service Animal/Pets Yes Access/Functional Needs Identified Yes Additional Access or Needs Comments Needs interpreter If not homeless, does the participant have the ability to self-isolate or quarantine w/o assistance No Ves Tested positive for COVID-19 and does not require hospitalization No Yes Asymptomatic but "high-risk" Yes Yes Object Pocumentation Received Yes Object Pocumentation Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 >	*Total Childrer	in Household
Service Animal/Pets Yes Yes Access/Functional Needs Identified Yes Additional Access or Needs Comments Needs interpreter If not homeless, does the participant have the ability to self-isolate or quarantine w/o assistance No No Ves Exposed to COVID-19 and does not require hospitalization Yes Asymptomatic but "high-risk" Yes Yes Objection Date Documentation Received Of/12/2020 Mon-Congregate Shelter Participation Information Unit Type Hotel/Motel The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 >	0	
Yes ✓ Access/Functional Needs Identified Yes Yes ✓ Additional Access or Needs Comments	Service Anima	I/Pets
Access/Functional Needs Identified Yes Additional Access or Needs Comments Needs Interpreter If not homeless, does the participant have the ability to self-isolate or quarantine w/o assistance No No No Vess Sufficient Documentation Received Yes Od/12/2020 Type of Documentation Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel Hotel/Motel Address Lamplighter in n Date of Project Roomkey Entry	Yes	v
Yes Additional Access or Needs Comments Needs interpreter If not homeless, does the participant have the ability to self-isolate or quarantine w/o assistance No No Tested positive for COVID-19 and does not require hospitalization No No Exposed to COVID-19 and does not require hospitalization Yes Asymptomatic but "high-risk" Yes Sufficient Documentation Received Yes Date Documentation Expected 06/12/2020 Type of Documentation Text describing documentation Non-Congregate Shelter Participation Information Vint Type Hotel/Motel Name The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry	Access/Function	onal Needs Identified
Additional Access or Needs Comments Needs interpreter If not homeless, does the participant have the ability to self-isolate or quarantine w/o assistance No No Tested positive for COVID-19 and does not require hospitalization No No Ves Sufficient Documentation Received Yes Type of Documentation Text describing documentation NoCongregate Shelter Participation Information Unit Type Hotel/Motel Name The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422	Yes	~
Needs interpreter If not homeless, does the participant have the ability to self-isolate or quarantine w/o assistance No ✓ Tested positive for COVID-19 and does not require hospitalization No ✓ Exposed to COVID-19 and does not require hospitalization Yes ✓ Asymptomatic but "high-risk" Yes ✓ Sufficient Documentation Received Yes ✓ Date Documentation Expected 06/12/2020 Type of Documentation Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel The Lamplighter Inn ✓ Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 ✓ Date of Project Roomkey Entry	Additional Acc	ess or Needs Comments
If not homeless, does the participant have the ability to self-isolate or quarantine w/o assistance No Tested positive for COVID-19 and does not require hospitalization No No Exposed to COVID-19 and does not require hospitalization Yes Yes Sufficient Documentation Received Yes Object Documentation Expected 06/12/2020 Type of Documentation Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel Motel/Motel Name The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422	Needs interpr	eter
No Tested positive for COVID-19 and does not require hospitalization No No Supposed to COVID-19 and does not require hospitalization Yes Yes Asymptomatic but "high-risk" Yes Yes Sufficient Documentation Received Yes Ob/12/2020 Type of Documentation Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry	If not homeles	s, does the participant have the ability to self-isolate or quarantine w/o assistance?
Tested positive for COVID-19 and does not require hospitalization No Exposed to COVID-19 and does not require hospitalization Yes Yes Asymptomatic but "high-risk" Yes Yes Sufficient Documentation Received Yes Yes Object Object Object Object Object Date Documentation Exposed to COVID-19 and does not require hospitalization Yes Yes Yes Yes Yes Object Object Object Object Date Documentation Image: State of the state of th	No	~
No Exposed to COVID-19 and does not require hospitalization Yes Asymptomatic but "high-risk" Yes Sufficient Documentation Received Yes Yes Date Documentation Expected 06/12/2020 1 Type of Documentation Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry	Tested positive	e for COVID-19 and does not require hospitalization
Exposed to COVID-19 and does not require hospitalization Yes Yes Asymptomatic but "high-risk" Yes Yes Sufficient Documentation Received Yes Yes Date Documentation Expected 06/12/2020 Type of Documentation Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel The Lamplighter Inn > Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 > Date of Project Roomkey Entry	No	▼
Yes Yes Asymptomatic but "high-risk" Yes Yes Sufficient Documentation Received Yes Yes Date Documentation Expected 06/12/2020 Image: the second seco	Exposed to CC	WID-19 and does not require hospitalization
Asymptomatic but "high-risk" Yes Sufficient Documentation Received Yes Date Documentation Expected 06/12/2020 Type of Documentation Text describing documentation Non- Congregate Shelter Participation Information Unit Type Hotel/Motel Hotel/Motel Name The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry	Yes	
Asymptomatic but high-risk Yes Sufficient Documentation Received Yes Yes Date Documentation Expected 06/12/2020 Type of Documentation Text describing documentation Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel Hotel/Motel Name The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry	•	
Tes Sufficient Documentation Received Yes Date Documentation Expected 06/12/2020 Type of Documentation Type of Documentation Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel Hotel/Motel Name The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry 	Asymptomatic	but "high-risk"
Sufficient Documentation Received Yes Date Documentation Expected 06/12/2020 Type of Documentation Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel Motel Name The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry	Tes	
Yes ✓ Date Documentation Expected 06/12/2020 @B Image: Comparison of the second se	Sufficient Doc	umentation Received
Date Documentation Expected 06/12/2020 Type of Documentation Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel Motel/Motel Name The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry	Yes	~
06/12/2020 Image: Constant of C	Date Documer	ntation Expected
Type of Documentation Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel Name The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry	06/12/2020	
Text describing documentation Non-Congregate Shelter Participation Information Unit Type Hotel/Motel Ame The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry	Type of Docum	entation
Non-Congregate Shelter Participation Information Unit Type Hotel/Motel Hotel/Motel Name The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry	Text describin	g documentation
Unit Type Hotel/Motel Hotel/Motel Name The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry	Non-Congrega	te Shelter Participation Information
Hotel/Motel Hotel/Motel Name The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry	Unit Type	
Hotel/Motel Name The Lamplighter Inn V Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 V Date of Project Roomkey Entry	Hotel/Motel	▼
The Lamplighter Inn Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 Date of Project Roomkey Entry	Hotel/Motel N	ame
Hotel/Motel Address Lamplighter - 14165 Lakeshore Dr. Clearlake, CA 95422 🗸 Date of Project Roomkey Entry	The Lamplight	er Inn 🗸
Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422 🗸	Hotel/Motel A	ddress
Date of Project Roomkey Entry	Lamplighter -	14165 Lakeshore Dr, Clearlake, CA 95422 🗸
	Date of Project	t Roomkey Entry
06/12/2020	06/12/2020	
Date of Project Roomkey Exit	Date of Proiec	t Roomkey Exit
06/14/2020	06/14/2020	
Exit Destination	Exit Destinatio	n
Interim Housing (e.g. bridge housing) 🗸		

Data Collection Forms March 31, 2021

All Projects (contact the HMIS Administrator or access this <u>Google Sites link</u> for the most current data collection forms)

Client Data Collection and Entry Forms

Client Record (all projects) Client Record Veteran Supplemental (All Projects) Project Enrollment (includes HMIS Assessments for Data Collection Stage = Entry) Project Exit (includes HMIS Assessments for Data Collection Stage = Exit)

Administrative Forms for additions to the HMIS

Agency Information Project Information User Setup and Permissions

Note about forms: HUD has typically been on a two-year cycle to update the HMIS data elements so when that happens the forms will be updated and published by the HMIS Administrator.