Kane Co. CoC Annual HMIS Training

Maureen Meyer

November 4, 2026

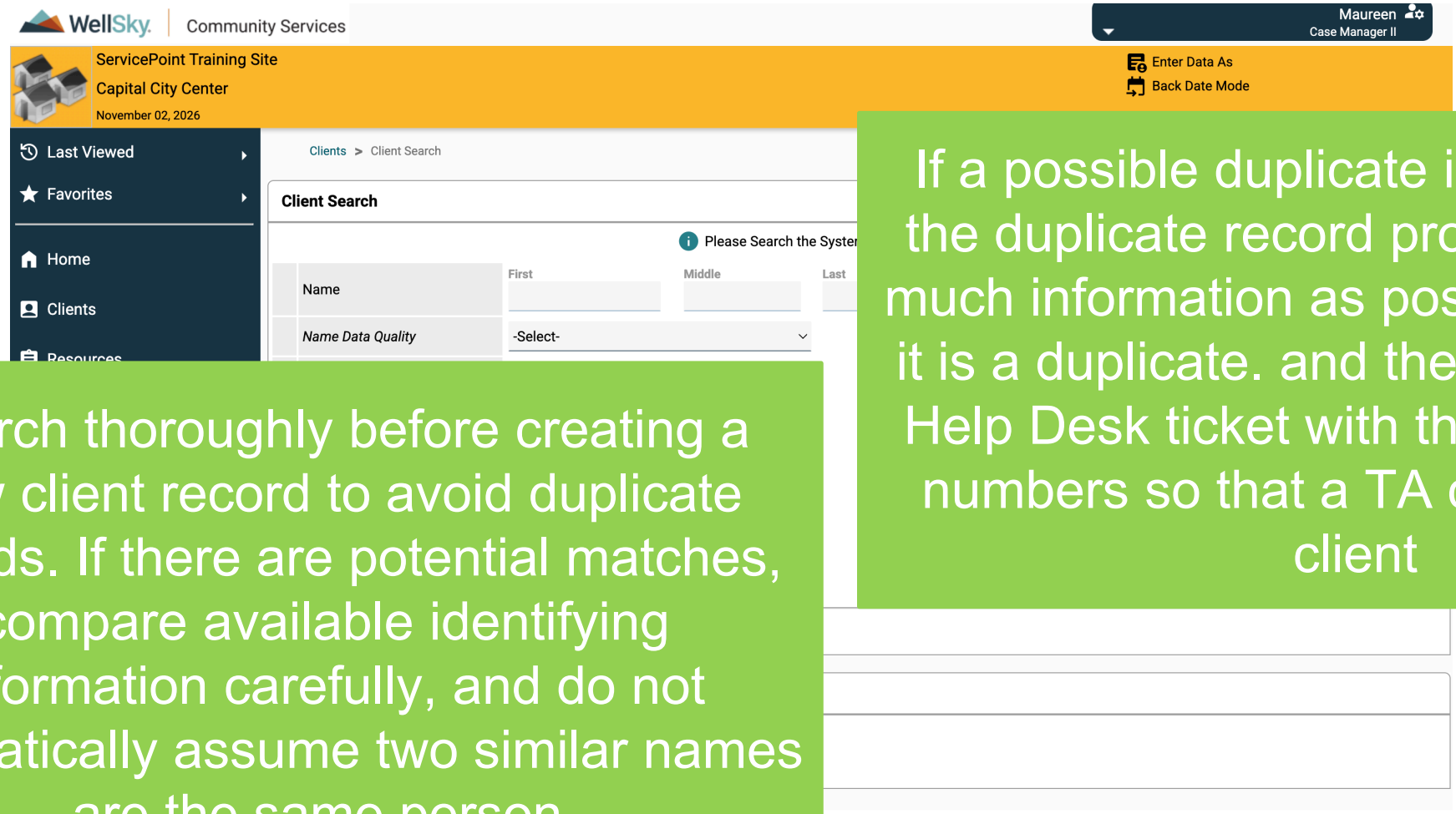
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What You Need To Know About This Meeting:

- ”Parking Lot” in case of questions that we need to get answers to
- Brief break after about an hour, and another after about two hours
- Rest rooms
- Hydration and caffeination

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Foundations and Record Integrity: Search Before Creating a New Client Record

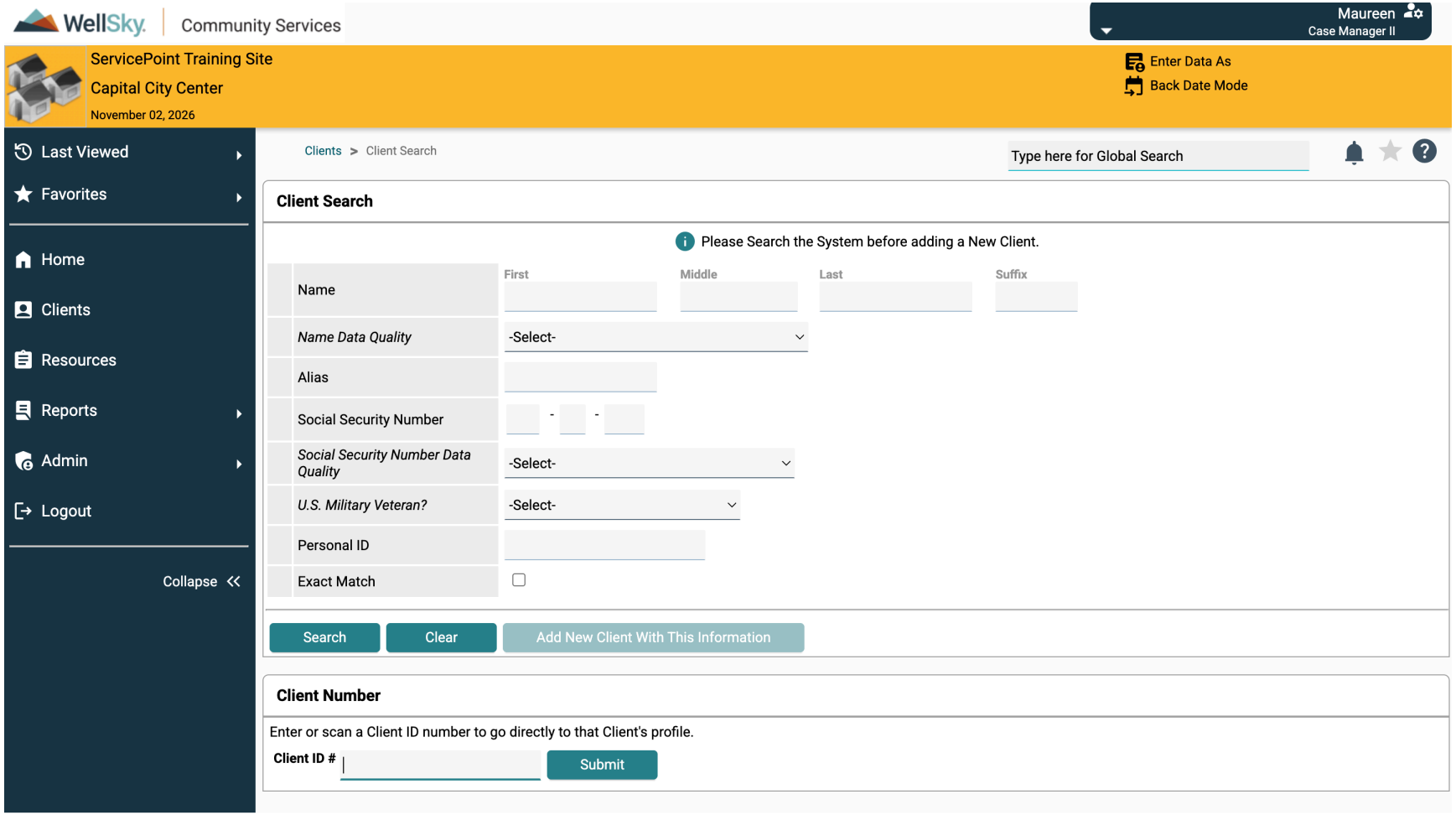


Search thoroughly before creating a new client record to avoid duplicate records. If there are potential matches, compare available identifying information carefully, and do not automatically assume two similar names are the same person.

If a possible duplicate is found, follow the duplicate record process: verify as much information as possible to confirm it is a duplicate. and then then create a Help Desk ticket with the two Client ID numbers so that a TA can merge the client

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Foundations and Record Integrity: Creating a New Client Record in WellSky



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Universal Data Elements

- "HMIS Universal Data Elements are elements required to be collected by all projects participating in HMIS, regardless of funding source. . . . The UDEs are the basis for producing unduplicated estimates of the number of people experiencing homelessness accessing services from homeless assistance projects, basic demographic characteristics of people experiencing homelessness, and patterns of service use, including information on shelter stays and homelessness over time."

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Universal Data Elements

Universal Identifier Elements (One and Only One per Client Record)	Universal Project Stay Elements (One or More Value(s) Per Client, One Value Per Project Stay)
3.01 Name	3.08 Disabling Condition
3.02 Social Security Number	3.10 Project Start Date
3.03 Date of Birth	3.11 Project Exit Date
3.04 Race and Ethnicity	3.12 Destination
3.07 Veteran Status	3.15 Relationship to Head of Household
	3.16 Enrollment CoC
	3.20 Housing Move-In Date
	3.917 Prior Living Situation

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Universal Data Elements: General Guidance

Universal Identifier Elements (One and Only One per Client Record)
3.01 Name
3.02 Social Security Number
3.03 Date of Birth
3.04 Race and Ethnicity
3.07 Veteran Status

Use the response that reflects the client's answer. Do not make a guess about what the response should be.

Review carried-forward information and update it only when the client provides new or corrected information.

Save and review the client summary before continuing.

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Universal Data Elements: Name

Universal Identifier Elements (One and Only One per Client Record)
3.01 Name
3.02 Social Security Number
3.03 Date of Birth
3.04 Race and Ethnicity
3.07 Veteran Status

When creating a new client record, enter the client's name and select the appropriate data quality indicator. When enrolling a client who already has a record in the HMIS, verify that the name in the system is accurate and as complete as possible and correct or complete it if it is not.

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Universal Data Elements: SSN

Universal Identifier Elements (One and Only One per Client Record)
3.01 Name
3.02 Social Security Number
3.03 Date of Birth
3.04 Race and Ethnicity
3.07 Veteran Status

Record the nine digit 'Social Security Number' and appropriate 'SSN Data Quality'. SSN greatly facilitates the process of identifying clients who have been served and allows projects to avoid creating duplicate records.

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Universal Data Elements: DOB

Universal Identifier Elements (One and Only One per Client Record)
3.01 Name
3.02 Social Security Number
3.03 Date of Birth
3.04 Race and Ethnicity
3.07 Veteran Status

Record the month, day, and year of birth for every person served. When enrolling a client who already has a record in the HMIS, verify that the 'Date of Birth' is accurate and complete and correct it if it is not. If the client cannot remember their birth year, it may be estimated by asking the person's age and calculating the approximate year of birth. If a client cannot remember the month or day of birth, record an approximate date of '01' for month and '01' for day.

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Universal Data Elements: Race and Ethnicity

Universal Identifier Elements (One and Only One per Client Record)
3.01 Name
3.02 Social Security Number
3.03 Date of Birth
3.04 Race and Ethnicity
3.07 Veteran Status

Record the self-identified race(s) and ethnicity of each client served. Help the client select as many race and/or ethnicity options that they identify with. When enrolling a client who already has a record in the HMIS, verify that race and ethnicity information is complete and accurately reflects how the client identifies, and correct if it does not.

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Universal Data Elements: Veteran Status

Universal Identifier Elements (One and Only One per Client Record)
3.01 Name
3.02 Social Security Number
3.03 Date of Birth
3.04 Race and Ethnicity
3.07 Veteran Status

Record whether the client is a Veteran. An HMIS should only have one record of 'Veteran Status' for each client, no matter how many enrollments they have. When enrolling a client who already has a record in the HMIS, verify that the Veteran status recorded is accurate and correct if it is not. 'Veteran Status' is not dependent on discharge status.

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Universal Data Elements: Data Quality Indicators

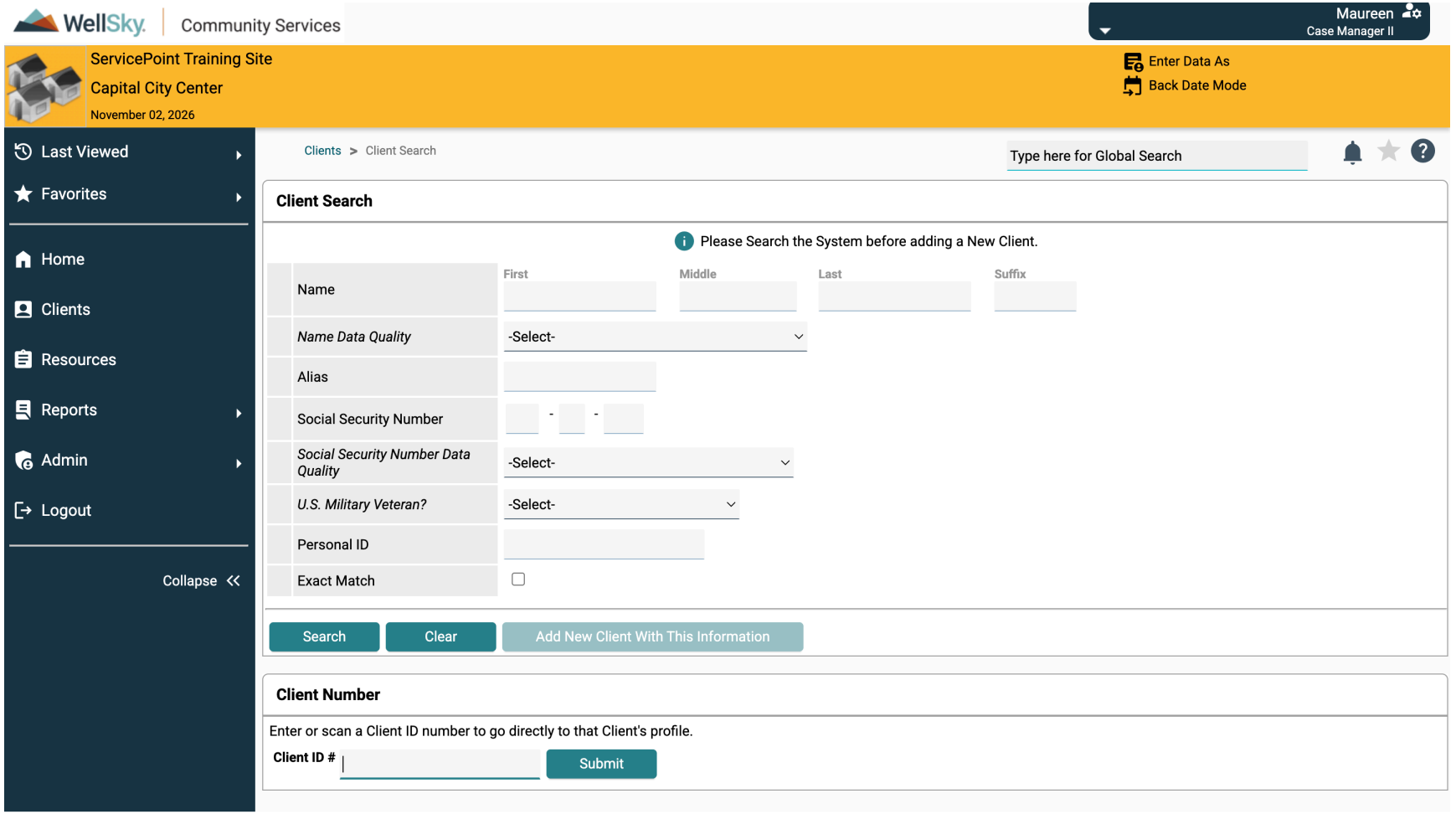
- “Client doesn't know” -- an explanation for missing data, generally used if client does not know the information.
- “Client prefers not to answer” -- an explanation for missing data, generally used if the Client prefers not to provide the information.
- “Data not collected” -- used when no attempt was made to collect the information from the client.

Use these options sparingly! It’s tempting to use them just to move through the workflow but resist the urge!

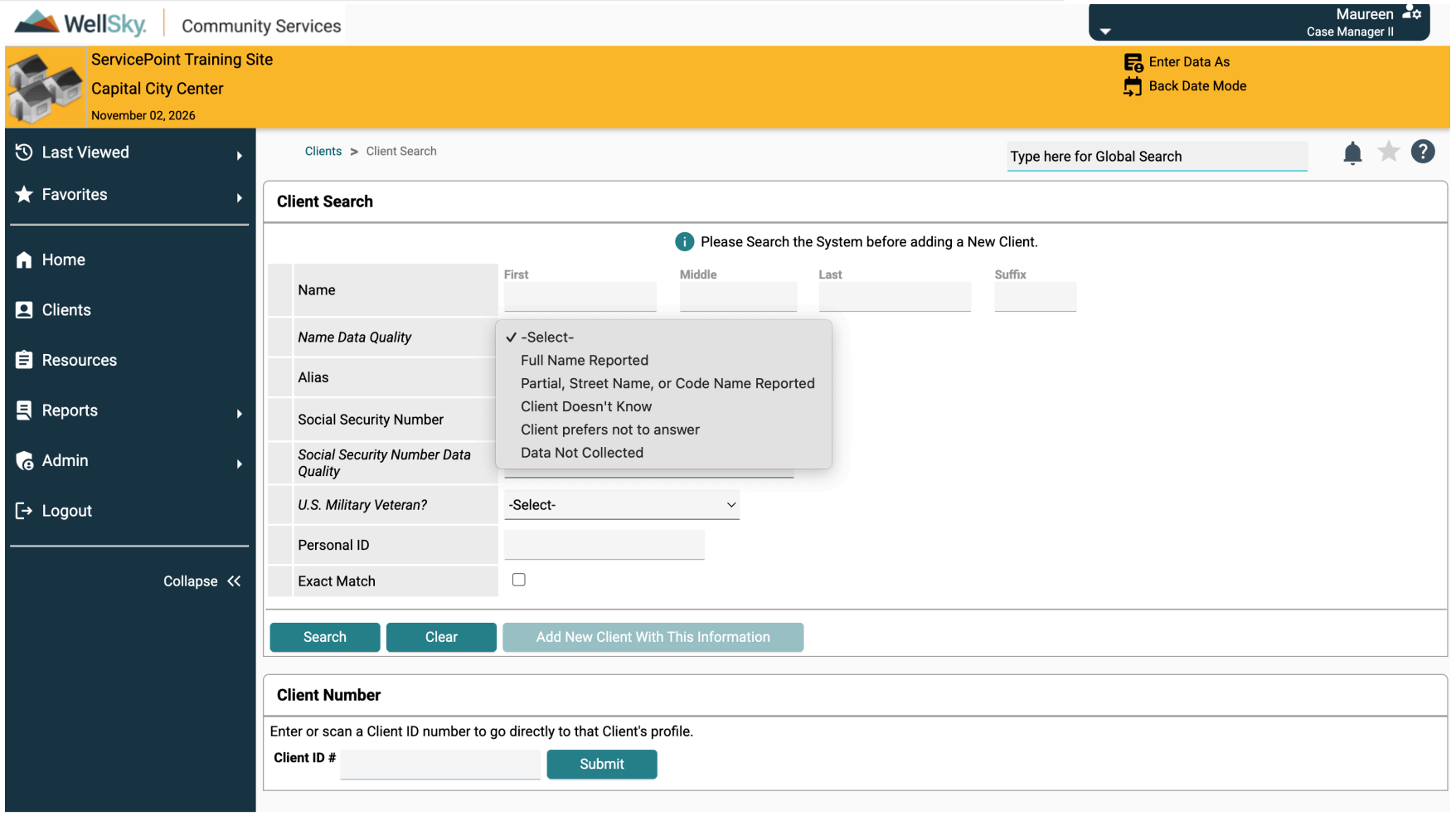
While responses other than ”full" are permitted, make every effort to collect and enter complete information whenever possible, and correct errors whenever you can.

Update only when the client provides new or corrected information.

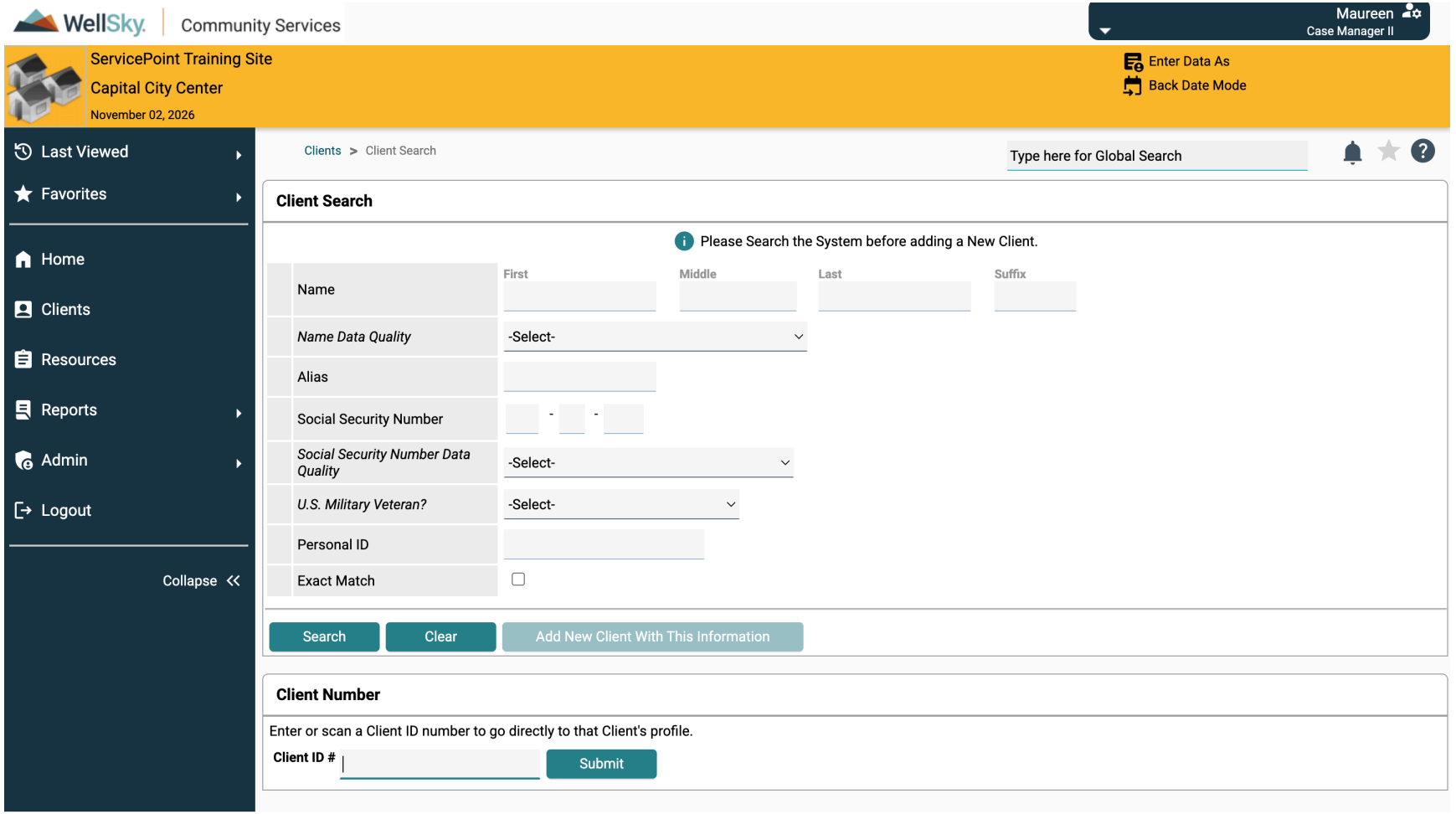
Universal Data Elements: In WellSky



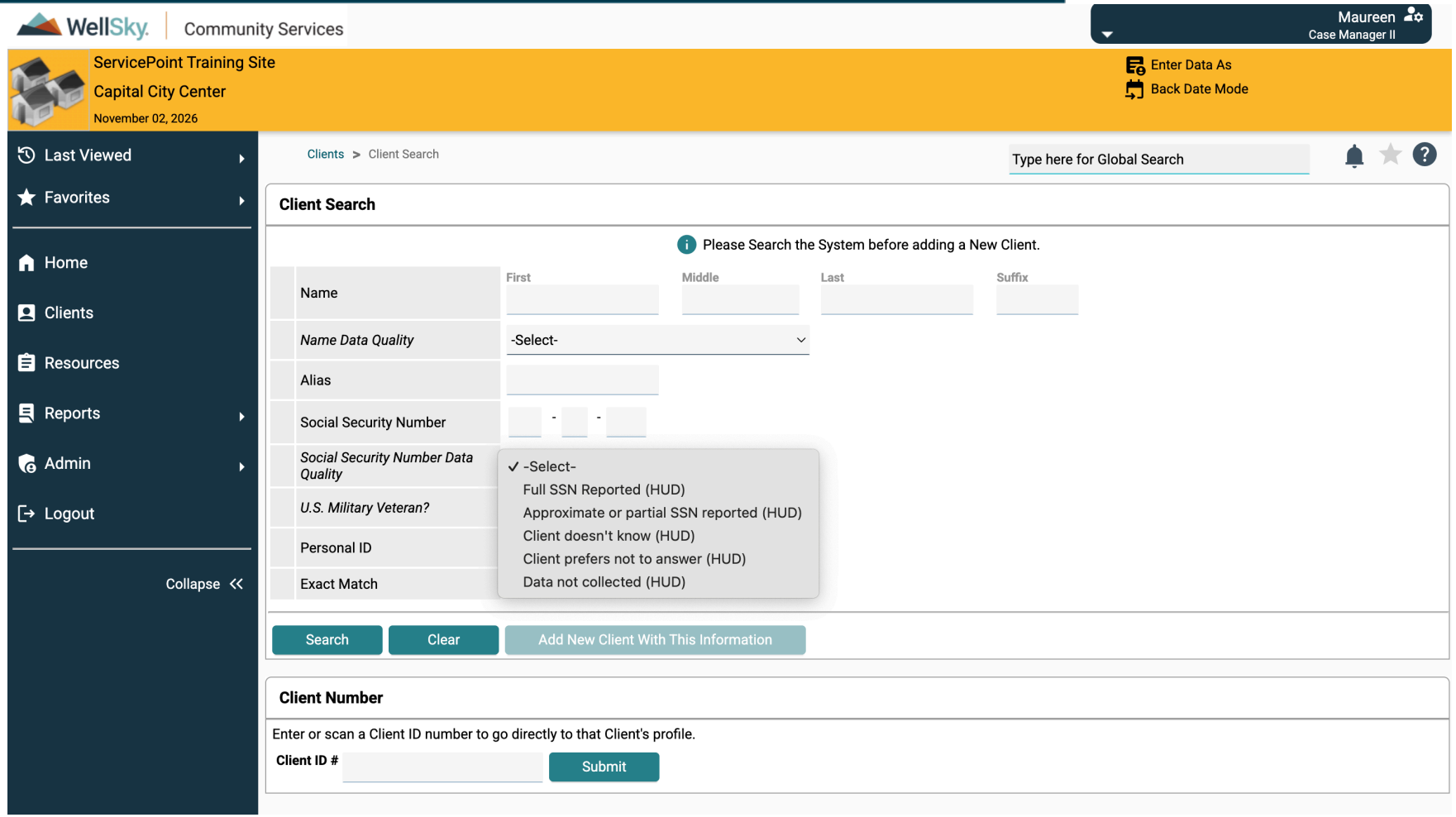
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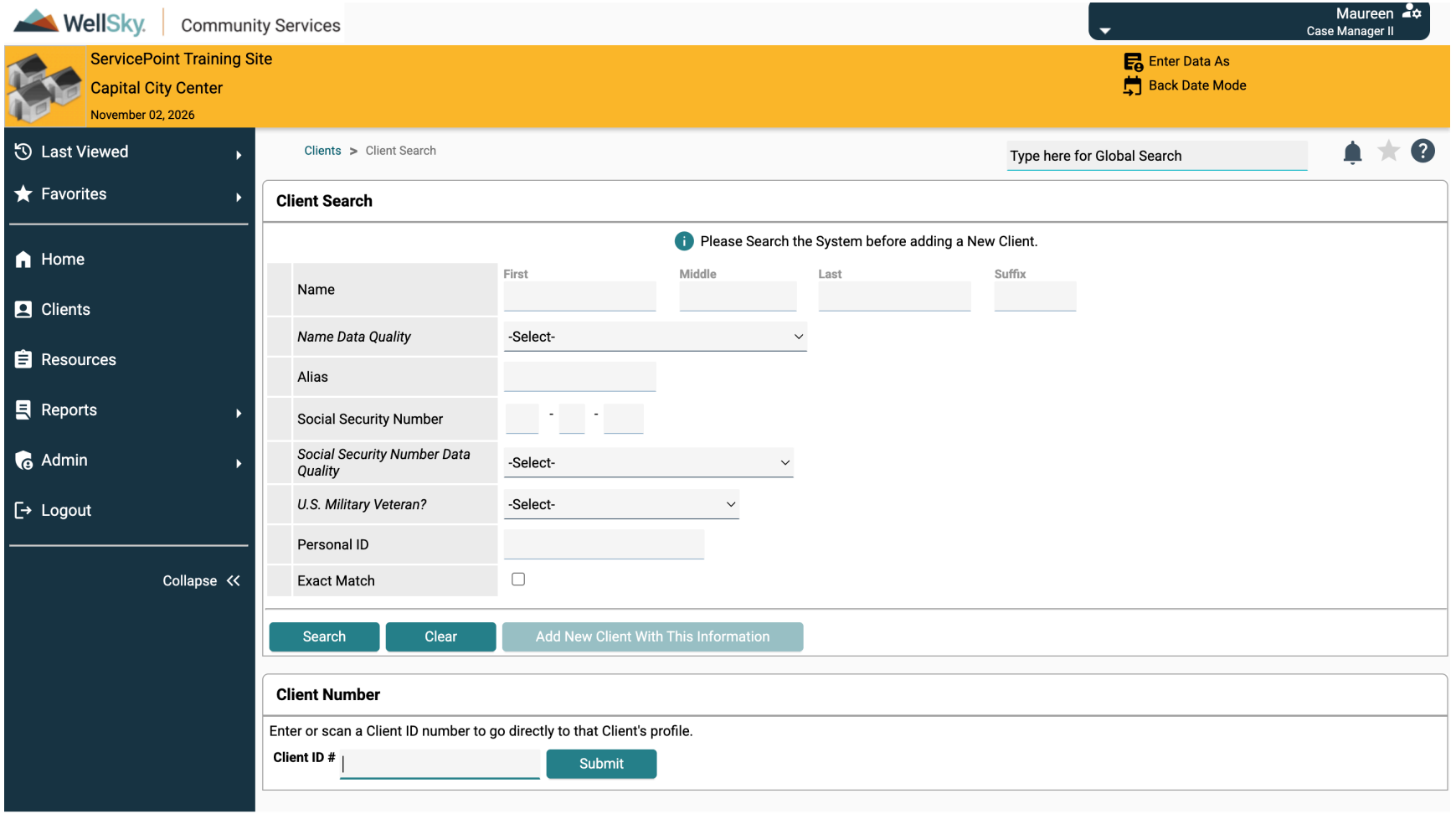


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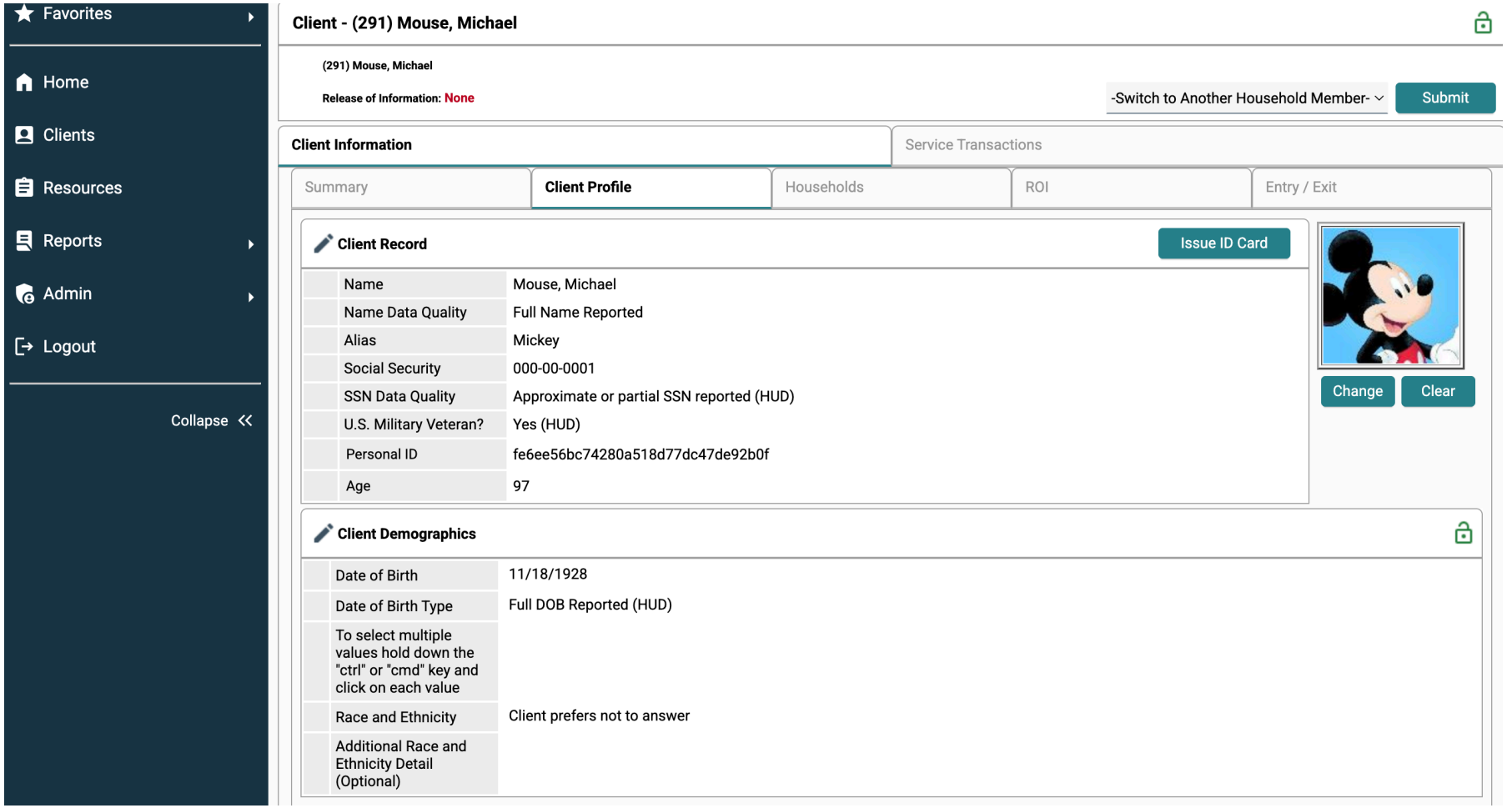
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Universal Data Elements: In WellSky



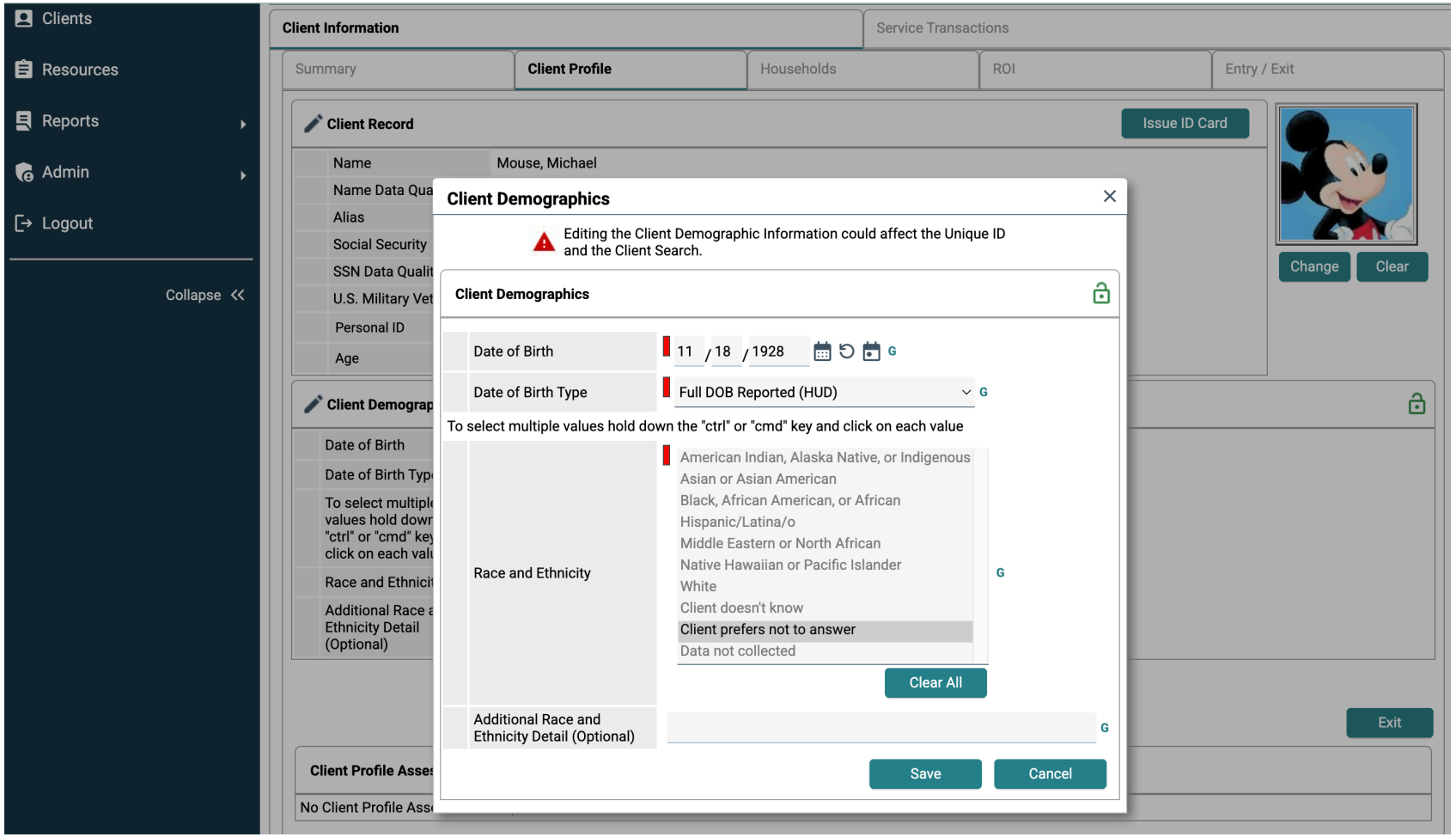
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Universal Data Elements: In WellSky

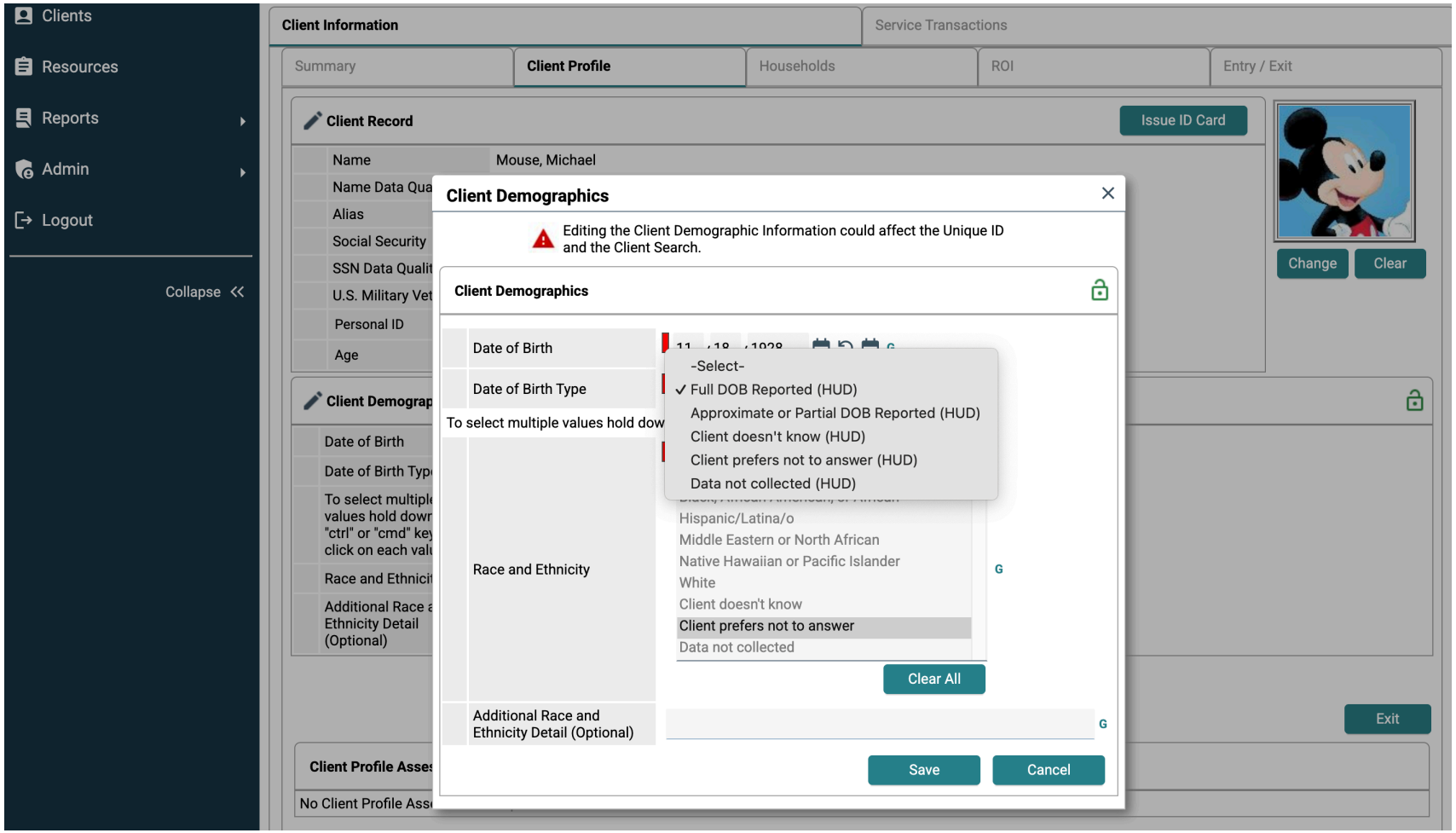


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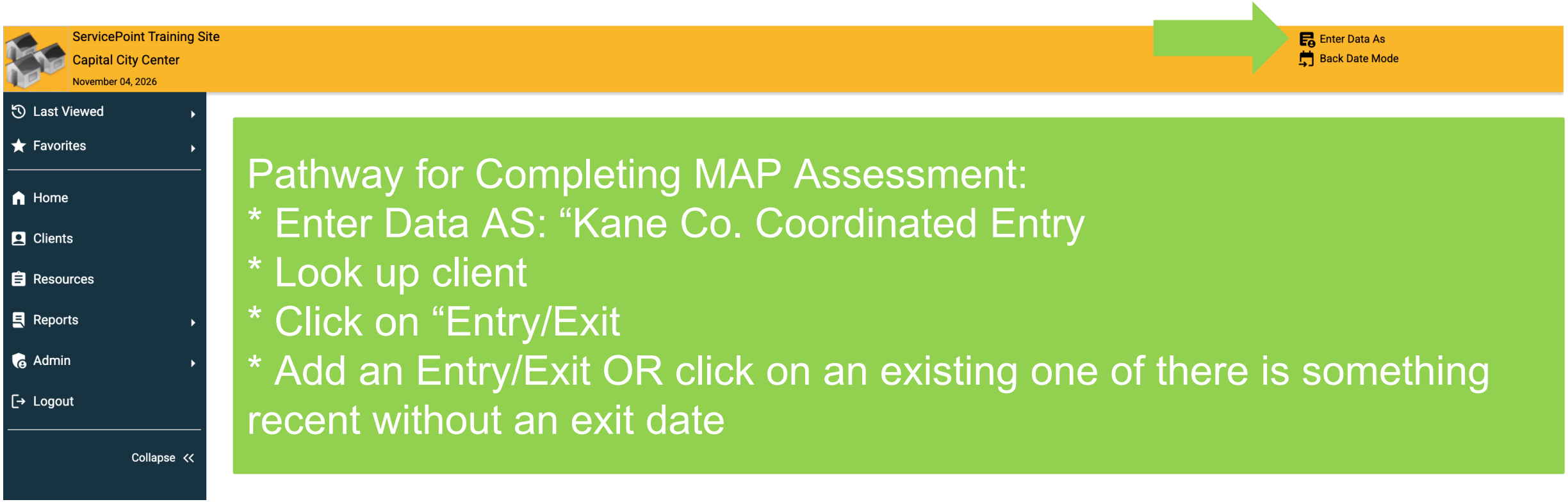
Universal Data Elements: In WellSky



Universal Data Elements: In WellSky



Enrollment Management: MAP and Coordinated Entry (CE)

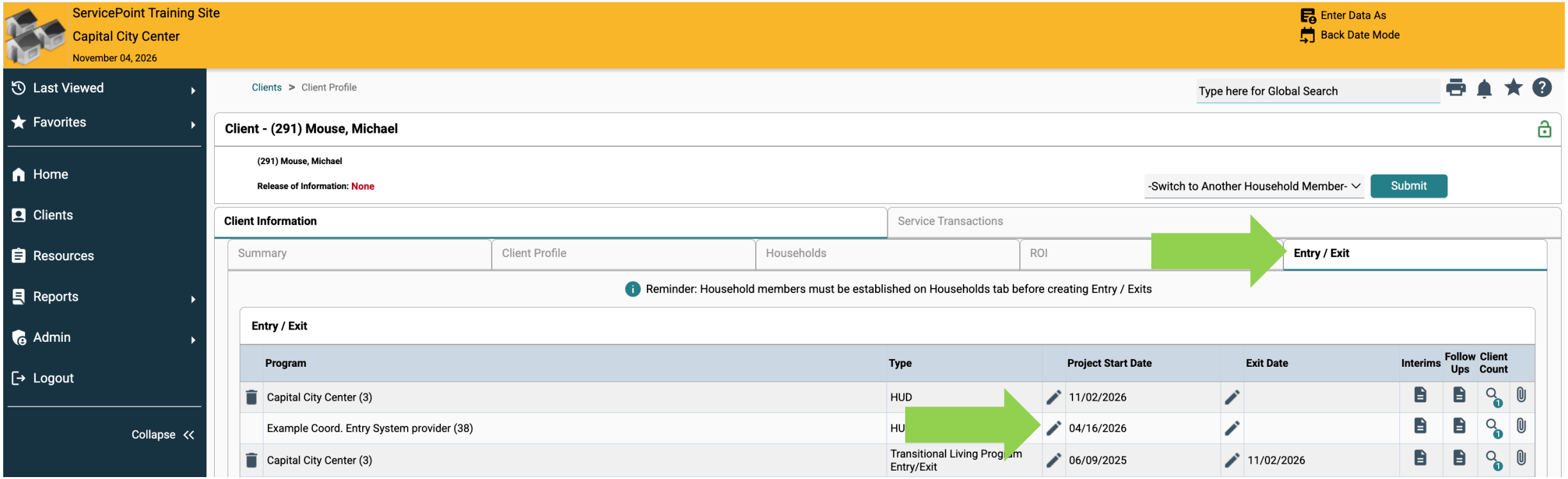


Pathway for Completing MAP Assessment:

* Enter Data AS: “Kane Co. Coordinated Entry
* Look up client
* Click on “Entry/Exit
* Add an Entry/Exit OR click on an existing one of there is something recent without an exit date

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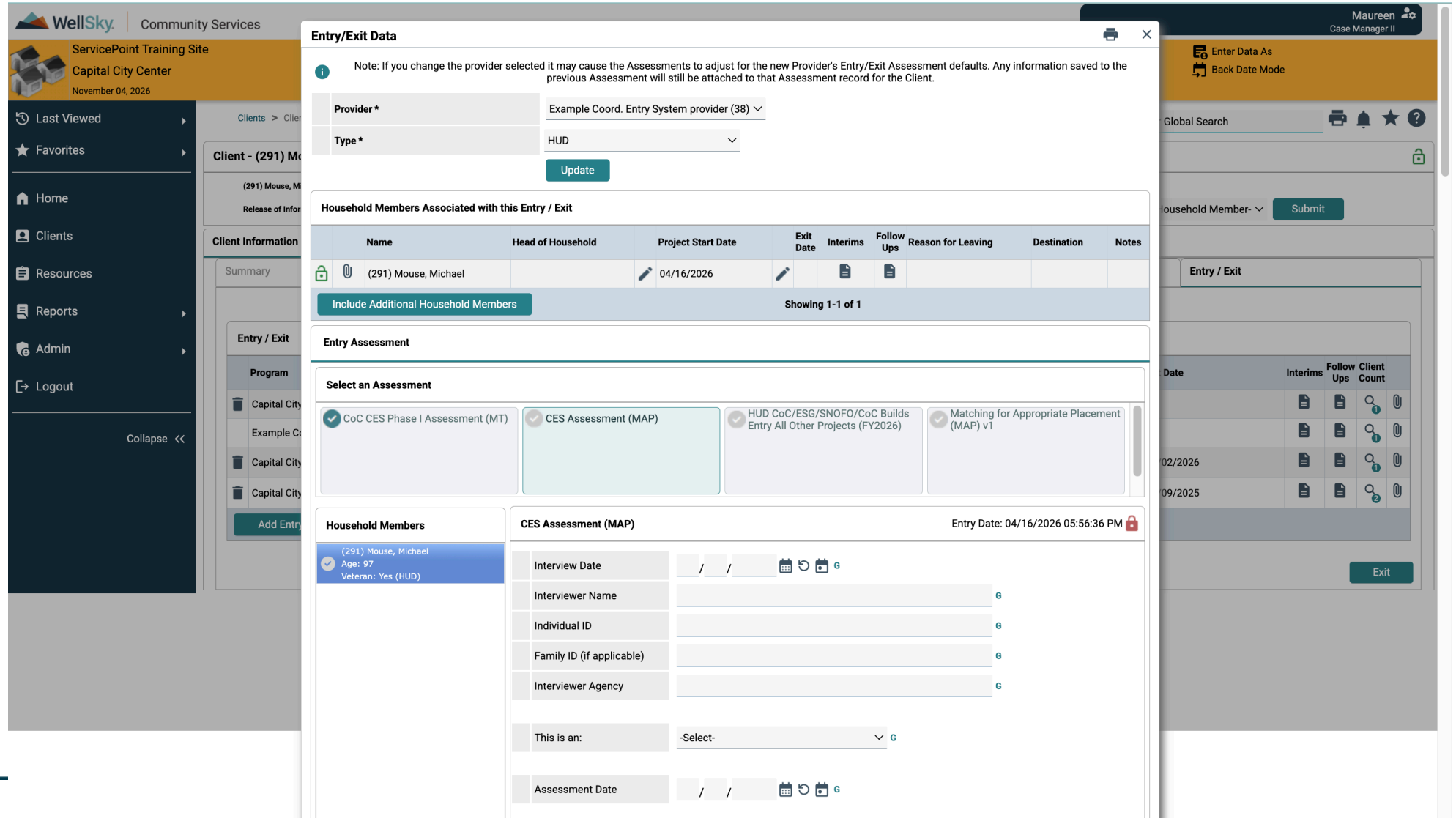
Enrollment Management: MAP and Coordinated Entry (CE)



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Enrollment Management: MAP and Coordinated Entry (CE)



Universal Data Elements

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	3.917 Prior Living Situation

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Intake, Assessment, and Income: Prior Living Situation and Chronic Homelessness

WHY IT IS IMPORTANT: Prior Living Situation is used with other information to identify whether a client appears to meet the criteria for experiencing chronic homelessness.

Statutory definition of a “place not meant for human habitation” -- means a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings, including a car, park, abandoned building, bus or train station, airport, or camping ground.

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Intake, Assessment, and Income: Prior Living Situation and Chronic Homelessness

Use the client's situation immediately before project start, record the actual or approximate date this episode of homelessness began (i.e., the beginning of the continuous period of homelessness on the streets, in emergency shelters, in Safe Havens, or moving back and forth between those places).

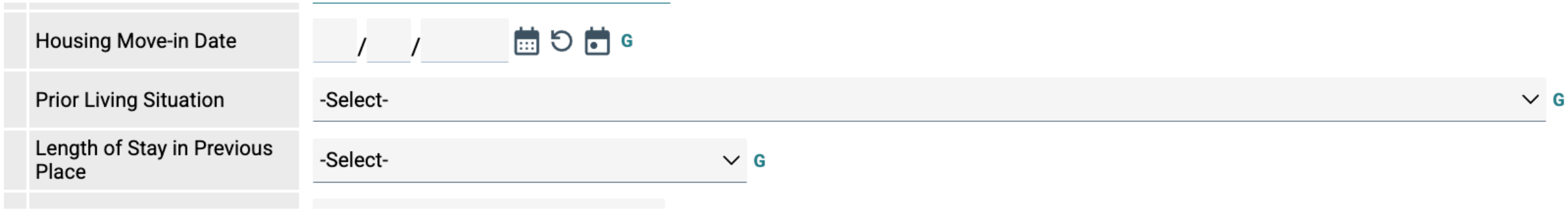
It is also helpful to review the full sequence for consistency, including homelessness history questions used for chronic-homelessness determination.

Households, Disabilities, and Housing: Chronic Homelessness

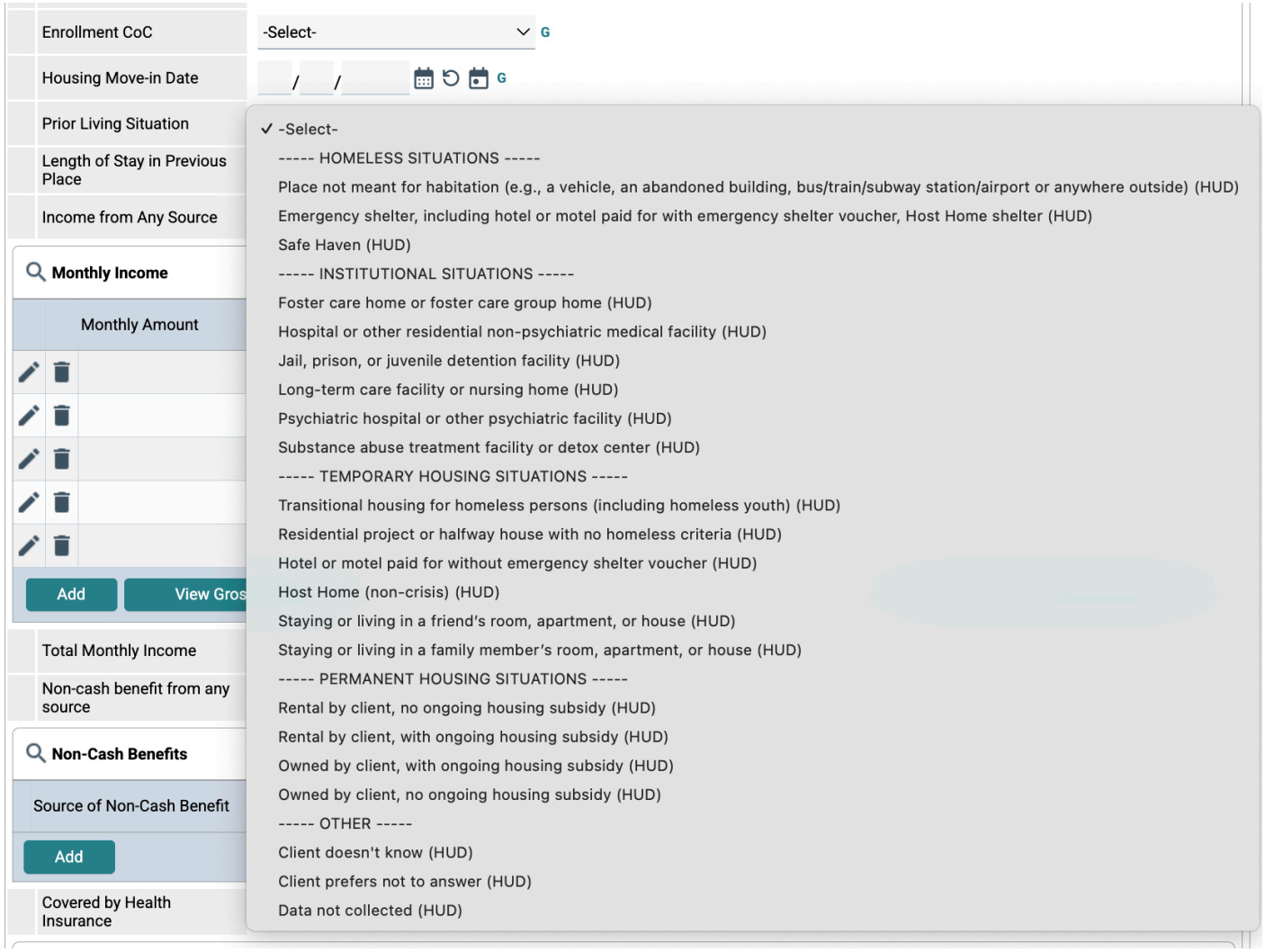
WHY IT IS IMPORTANT: Make sure to properly document homeless duration and/or disability (which will be discussed more later)! Failure to do so makes these clients appear to not be chronically homeless when they are.

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Households, Disabilities, and Housing: Chronic Homelessness Questions in WellSky

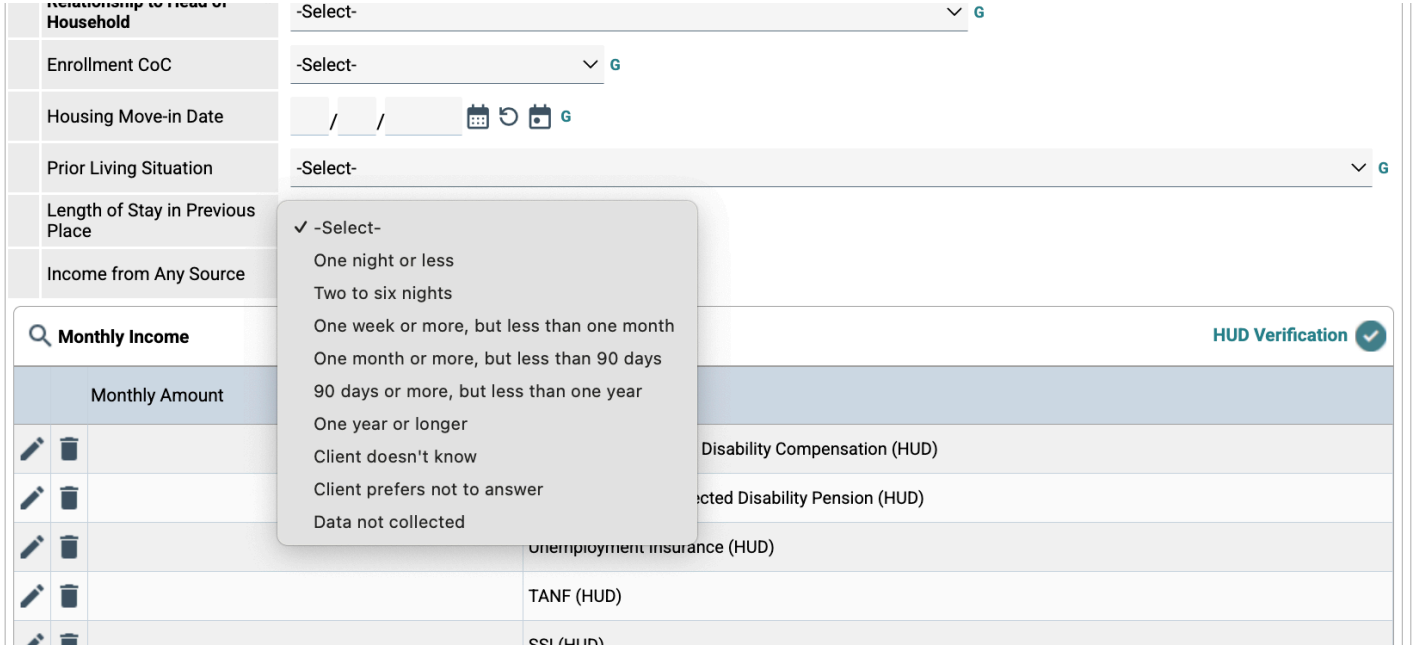


Households, Disabilities, and Housing: Chronic Homelessness Questions in WellSky

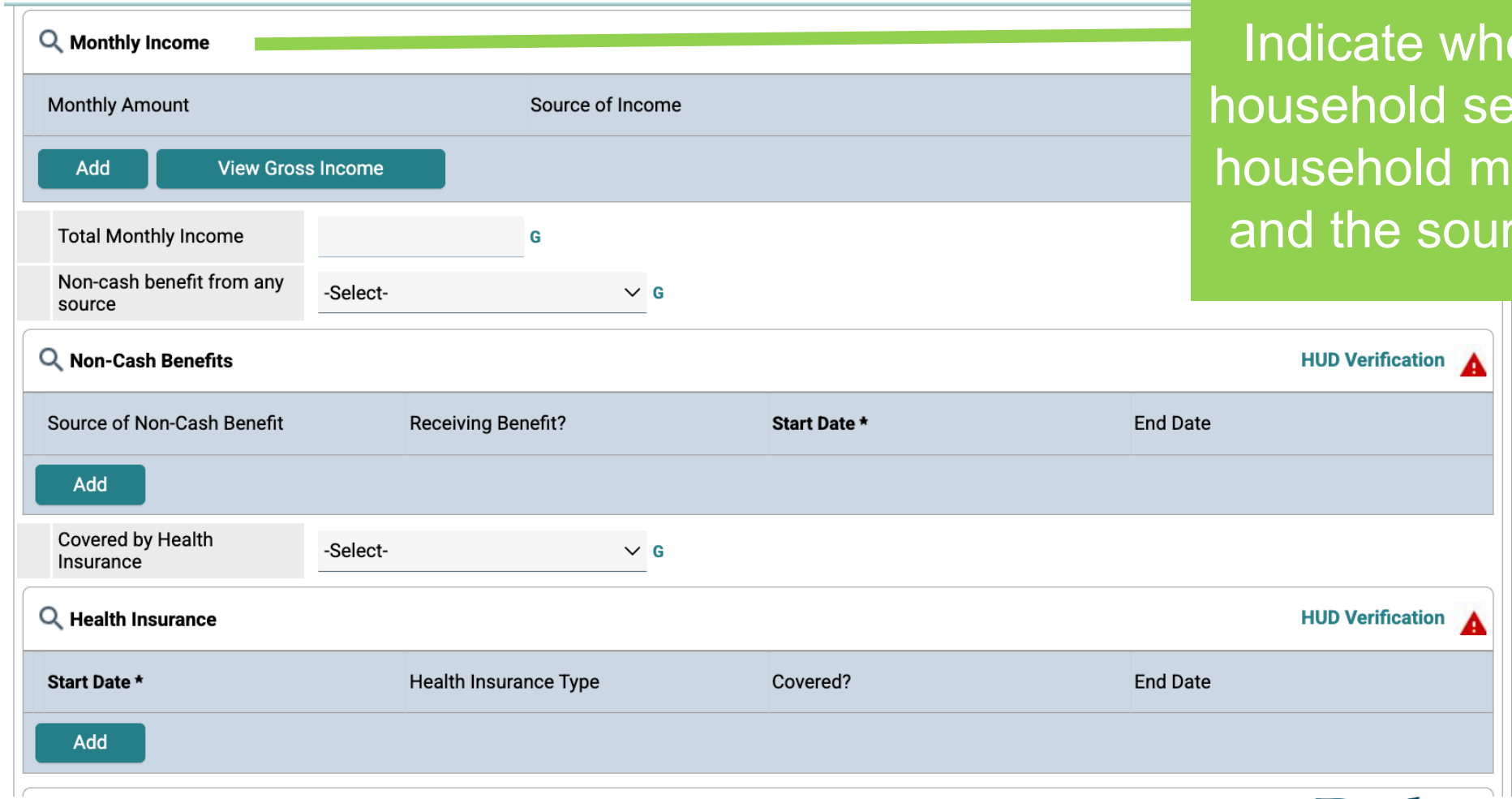


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Households, Disabilities, and Housing: Chronic Homelessness Questions in WellSky



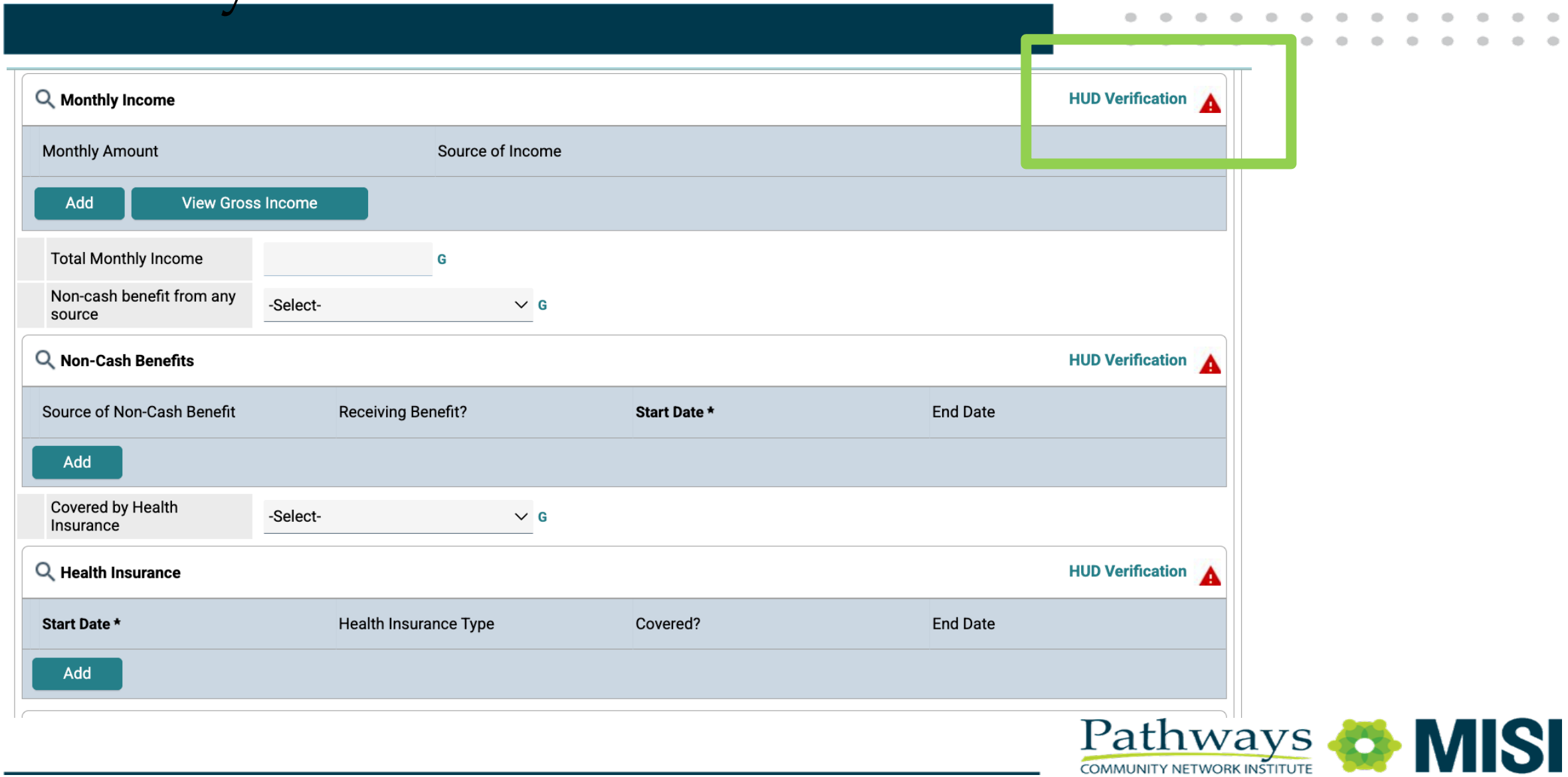
Intake, Assessment, and Income: Income at Entry in WellSky



Indicate whether each head of household served and each adult household member have income and the sources of that income.

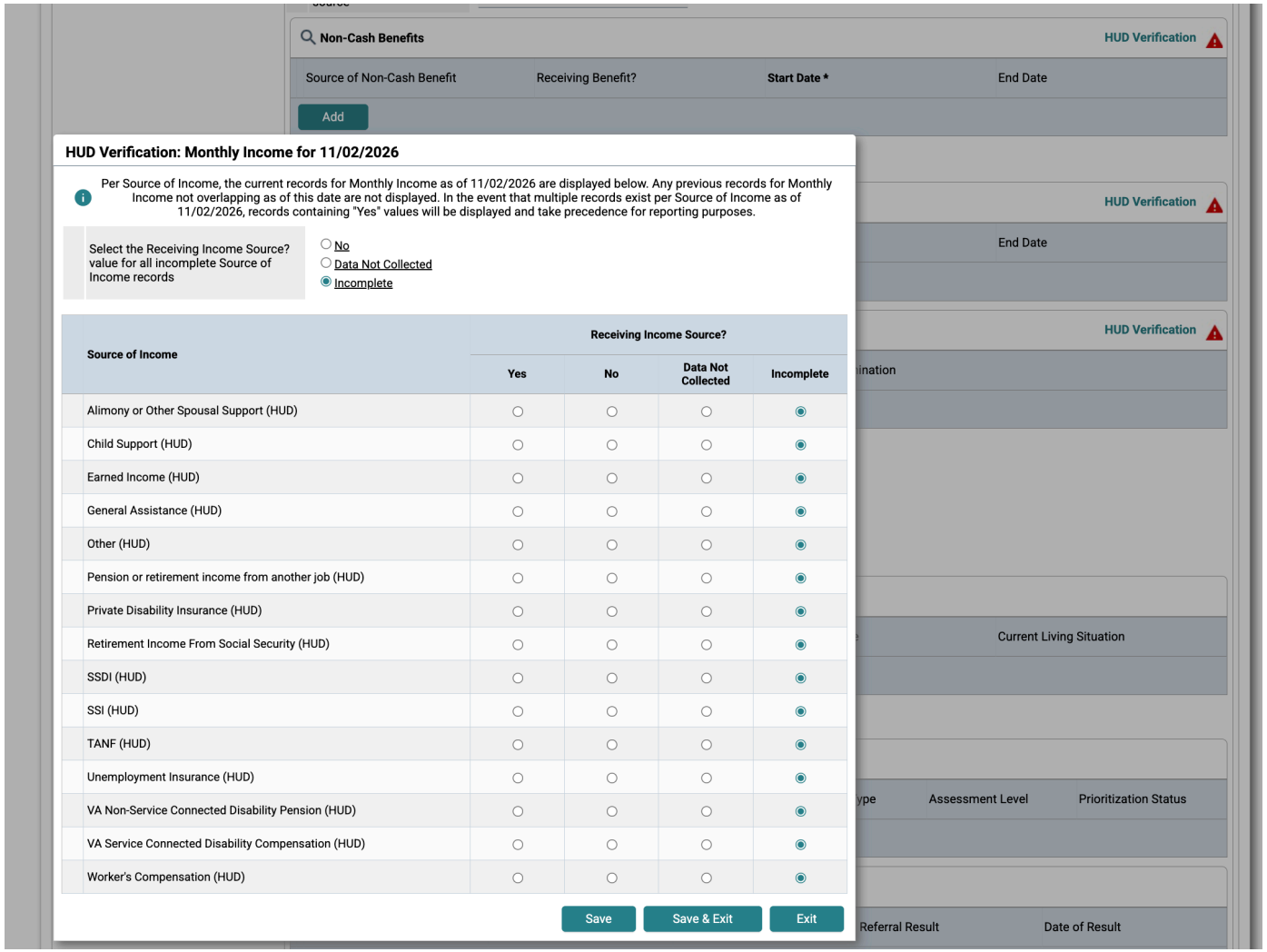
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Intake, Assessment, and Income: Income at Entry in WellSky

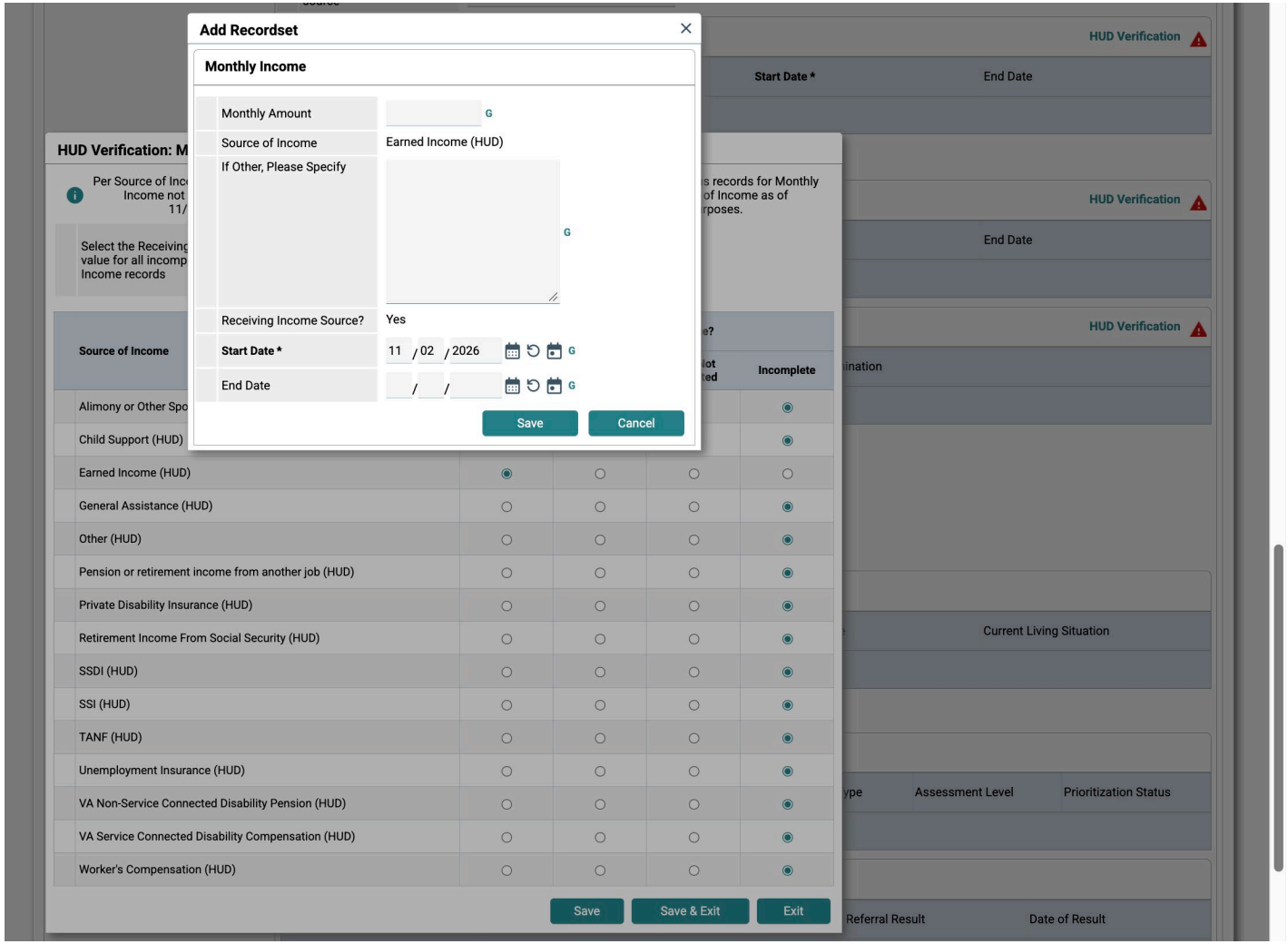


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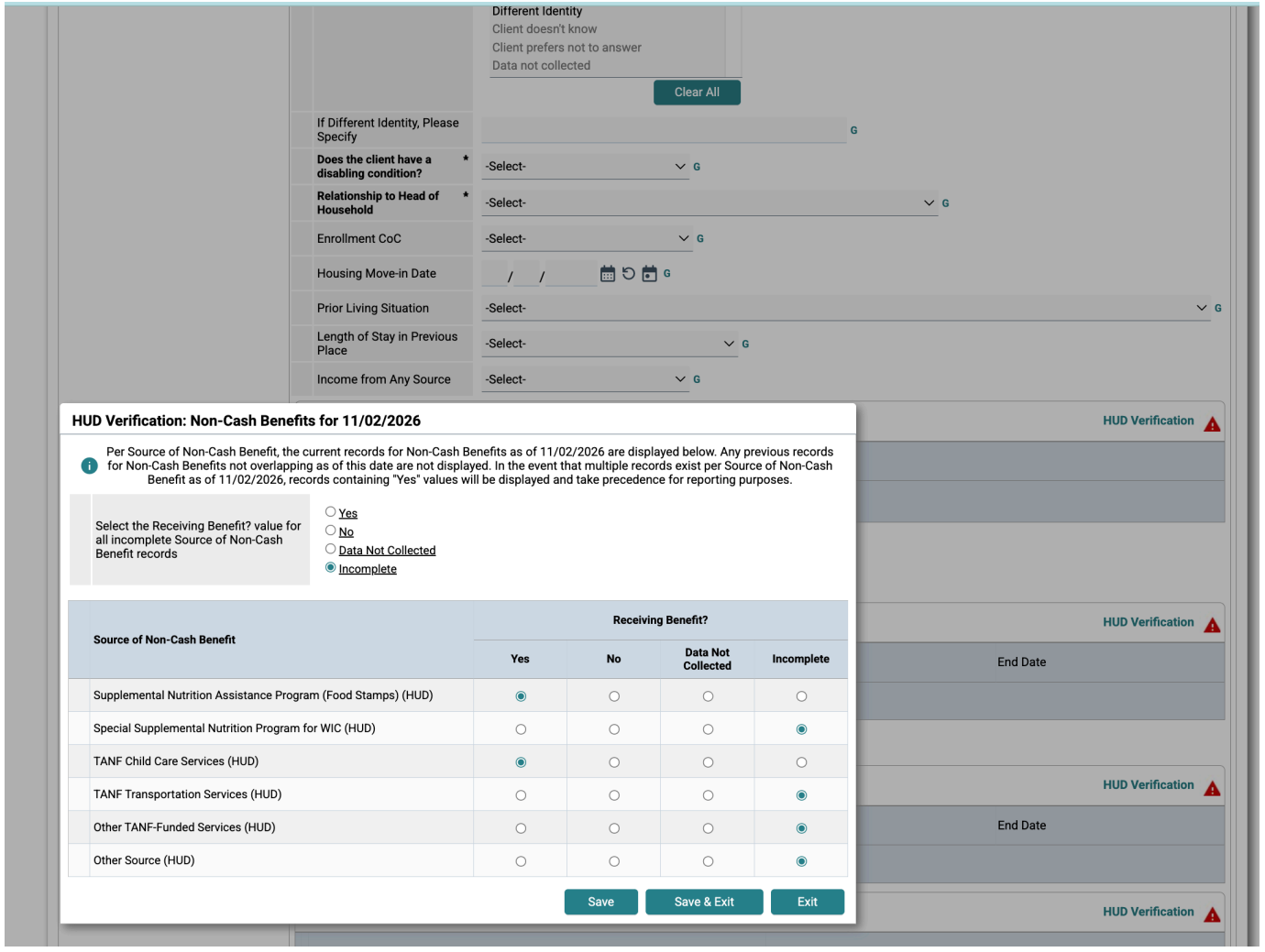
Intake, Assessment, and Income: Income at Entry in WellSky



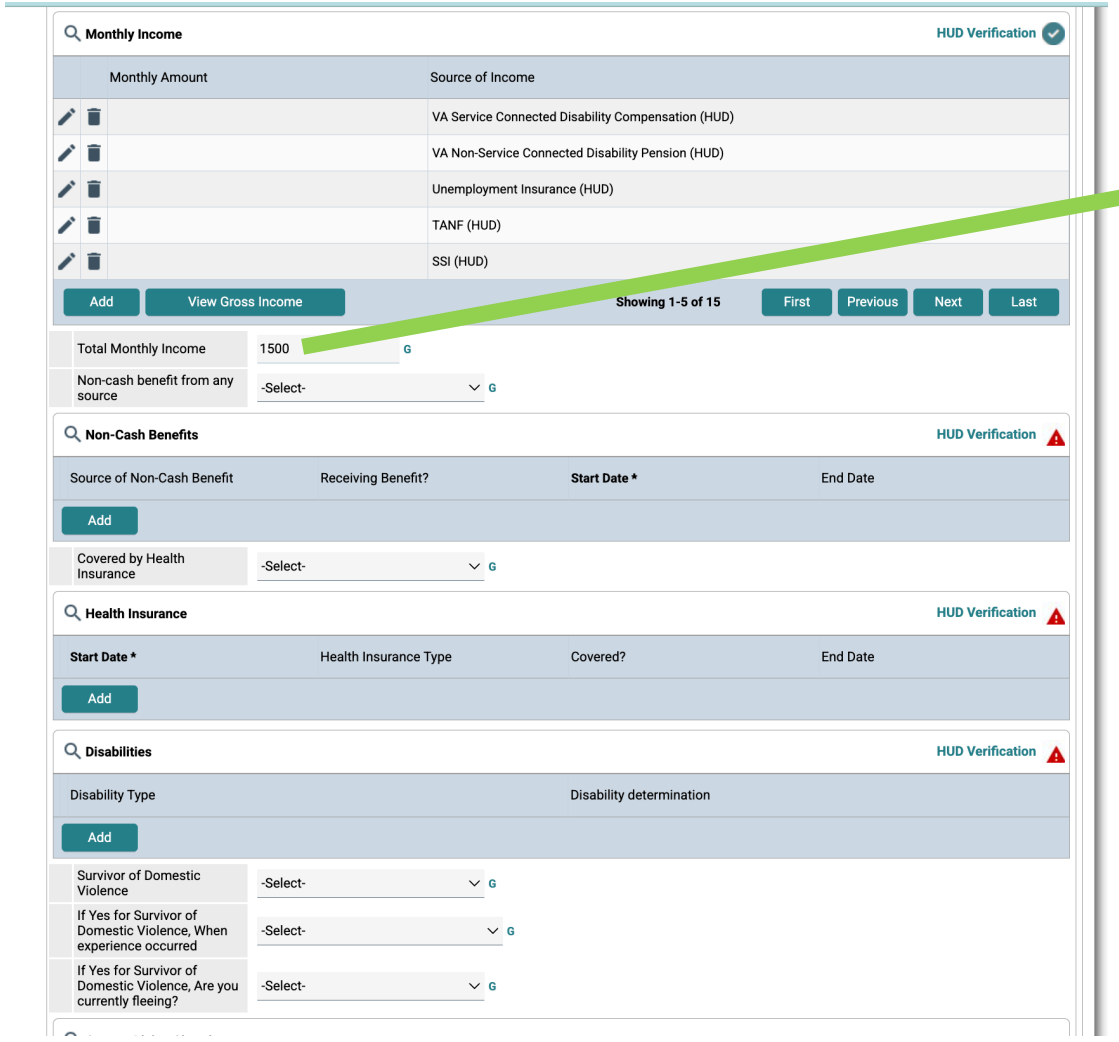
Intake, Assessment, and Income: Income at Entry in WellSky



Intake, Assessment, and Income: Income at Entry in WellSky



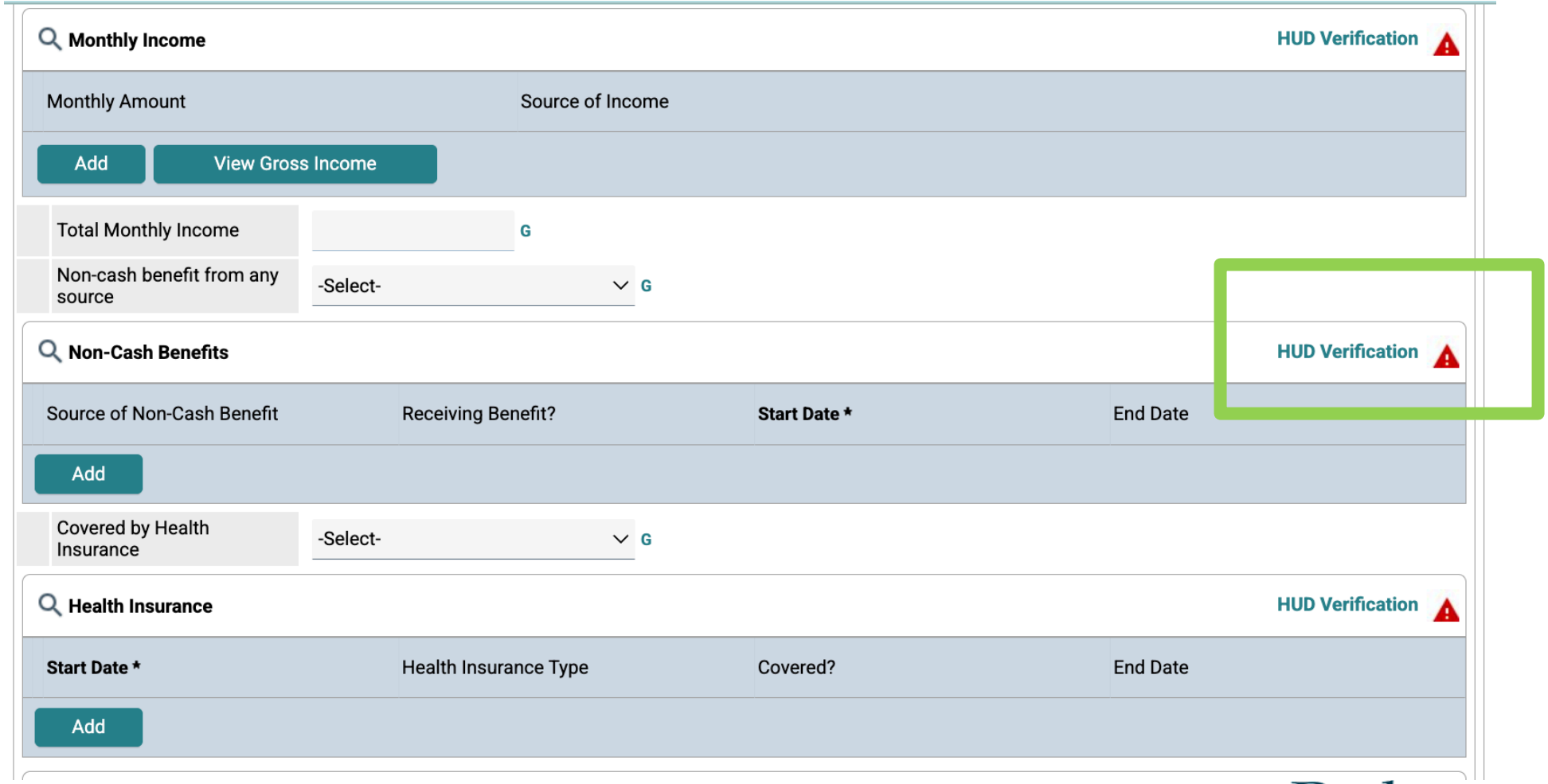
Intake, Assessment, and Income: Income at Entry in WellSky



Ensure the summary is consistent with the detailed income records.

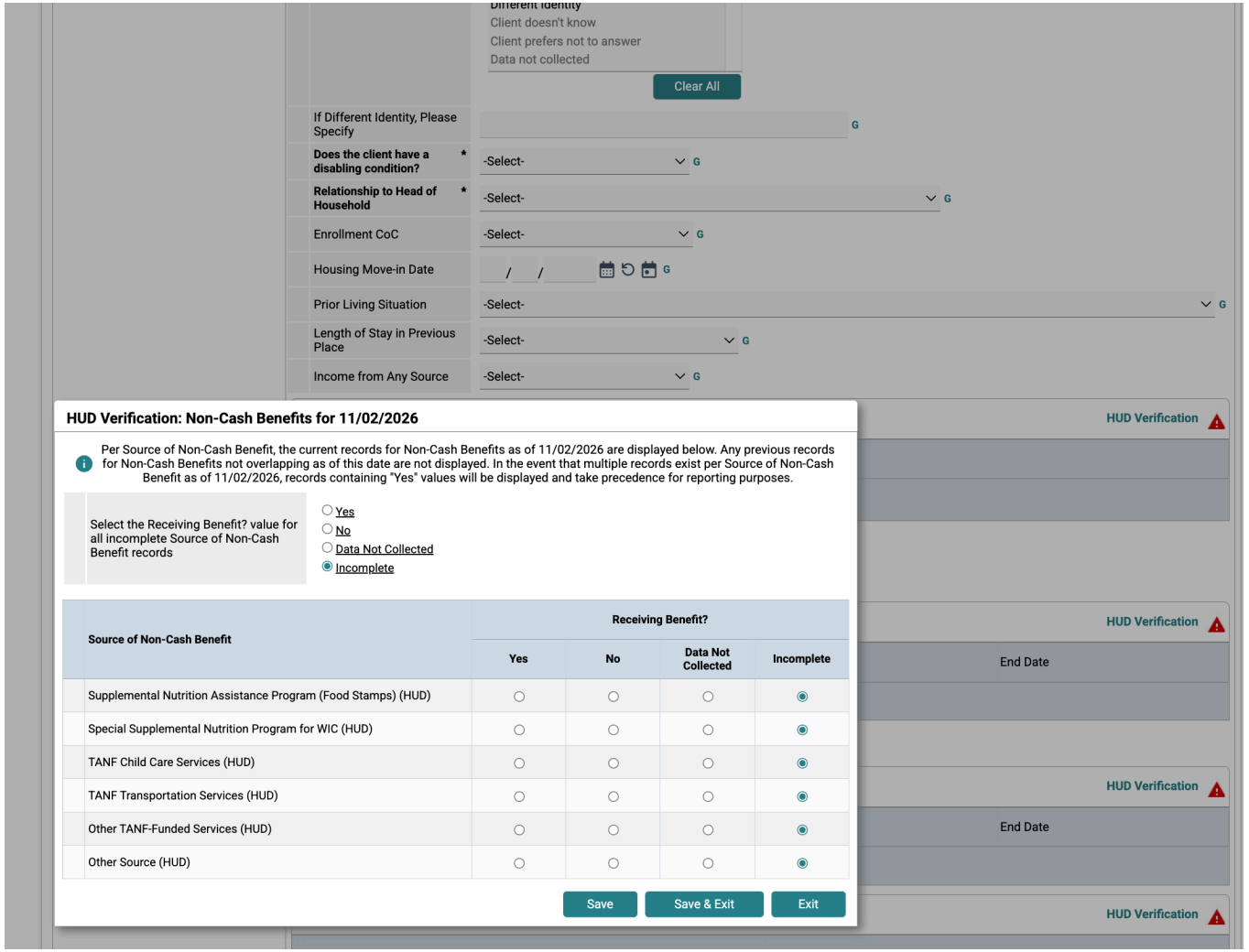
Review the total monthly income and resolve discrepancies before completing the workflow.

Intake, Assessment, and Income: Non-cash Benefits at Entry in WellSky



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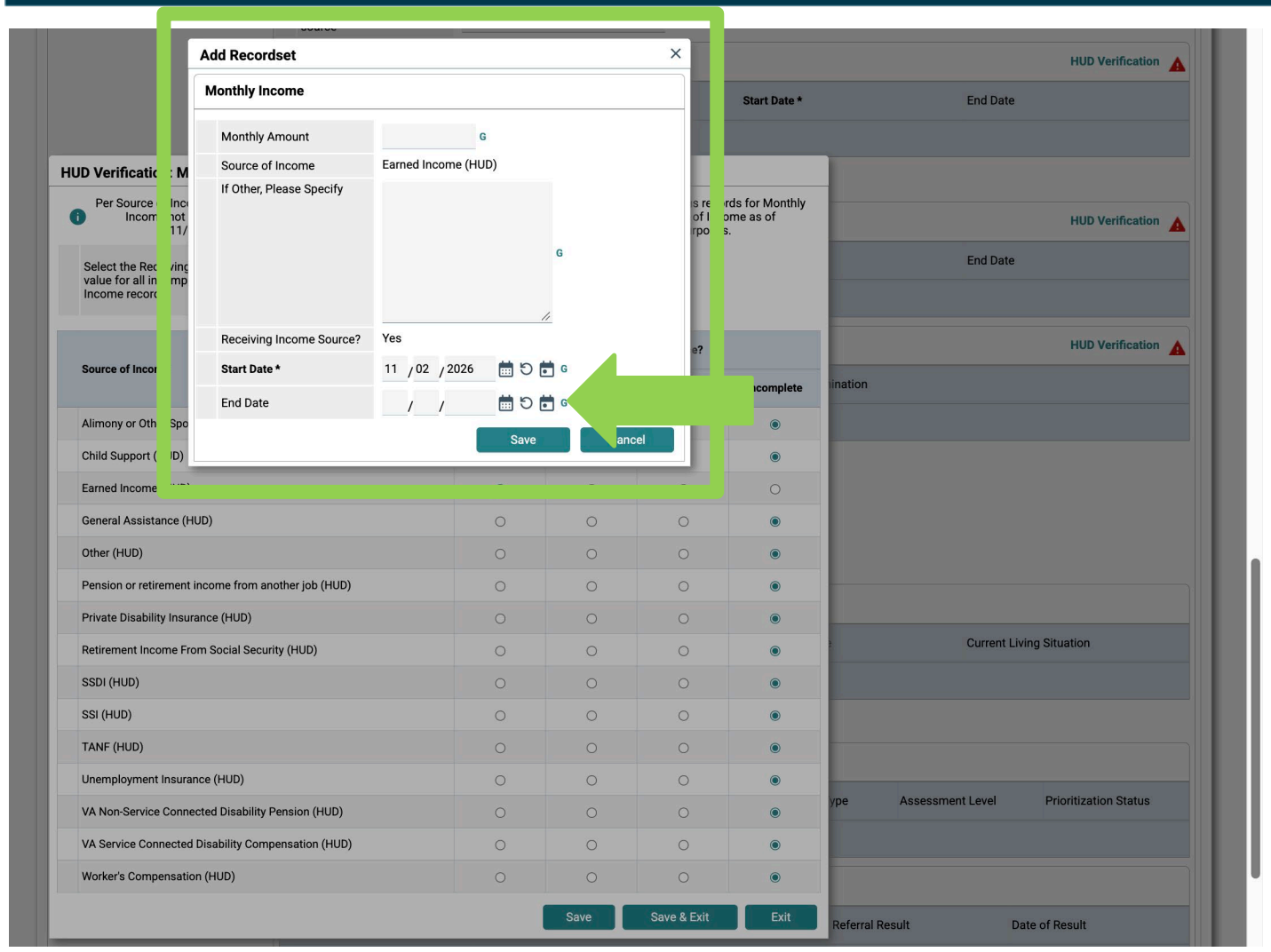
Intake, Assessment, and Income: Non-cash Benefits at Entry in WellSky



Intake, Assessment, and Income: Changes in Income

Proper procedure for updating income records:
* If a client is no longer receiving a source of income, users should not just change the response from "Yes" to "No."
* Instead, an End Date should be entered to accurately document when the income ended.

Intake, Assessment, and Income: Changes in Income in WellSky



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Intake, Assessment, and Income: Annual Assessment

Complete the annual assessment according to the required anniversary window and use the anniversary date as the information date. Annual assessments must be completed within 30 days before or 30 days after the enrollment anniversary date.

Create the appropriate annual/interim update rather than overwriting historical information.

Review all required elements, even when the client reports no change.

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Intake, Assessment, and Income: Assessments in WellSky

Client - (13960) Test, Just A

Mass Visibility Update

(13960) Test, Just A

Release of Information: None

-Switch to Another Household Member-

Submit

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans | Measurements | Assessments

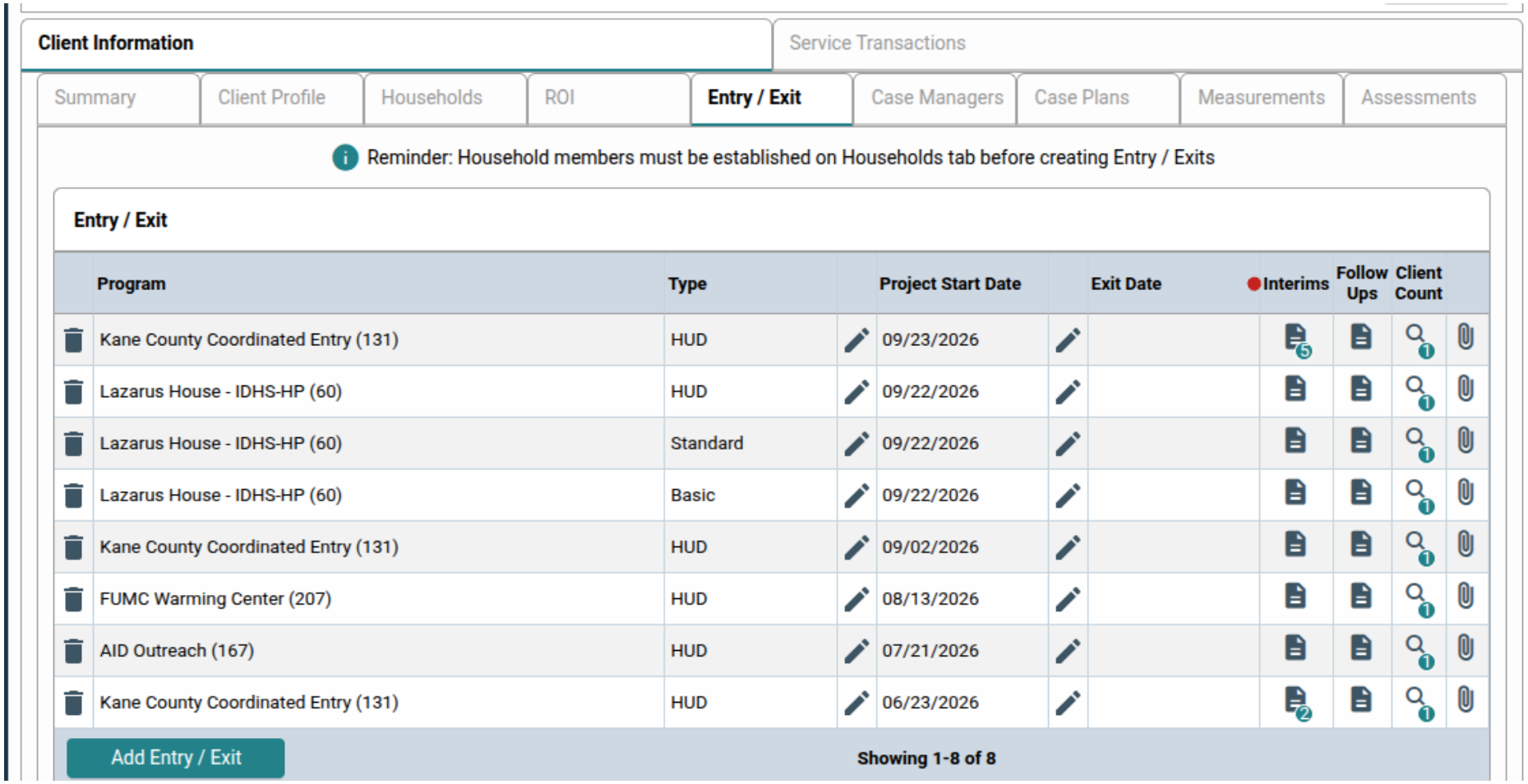
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Name	Test, Just A	Social Security	135-00-2017	
Date of Birth	01/01/1970 (Age 56)	U.S. Military Veteran?	Yes (HUD)	
Race and Ethnicity	Black, African American, or African Hispanic/Latina/o White			
Sex				

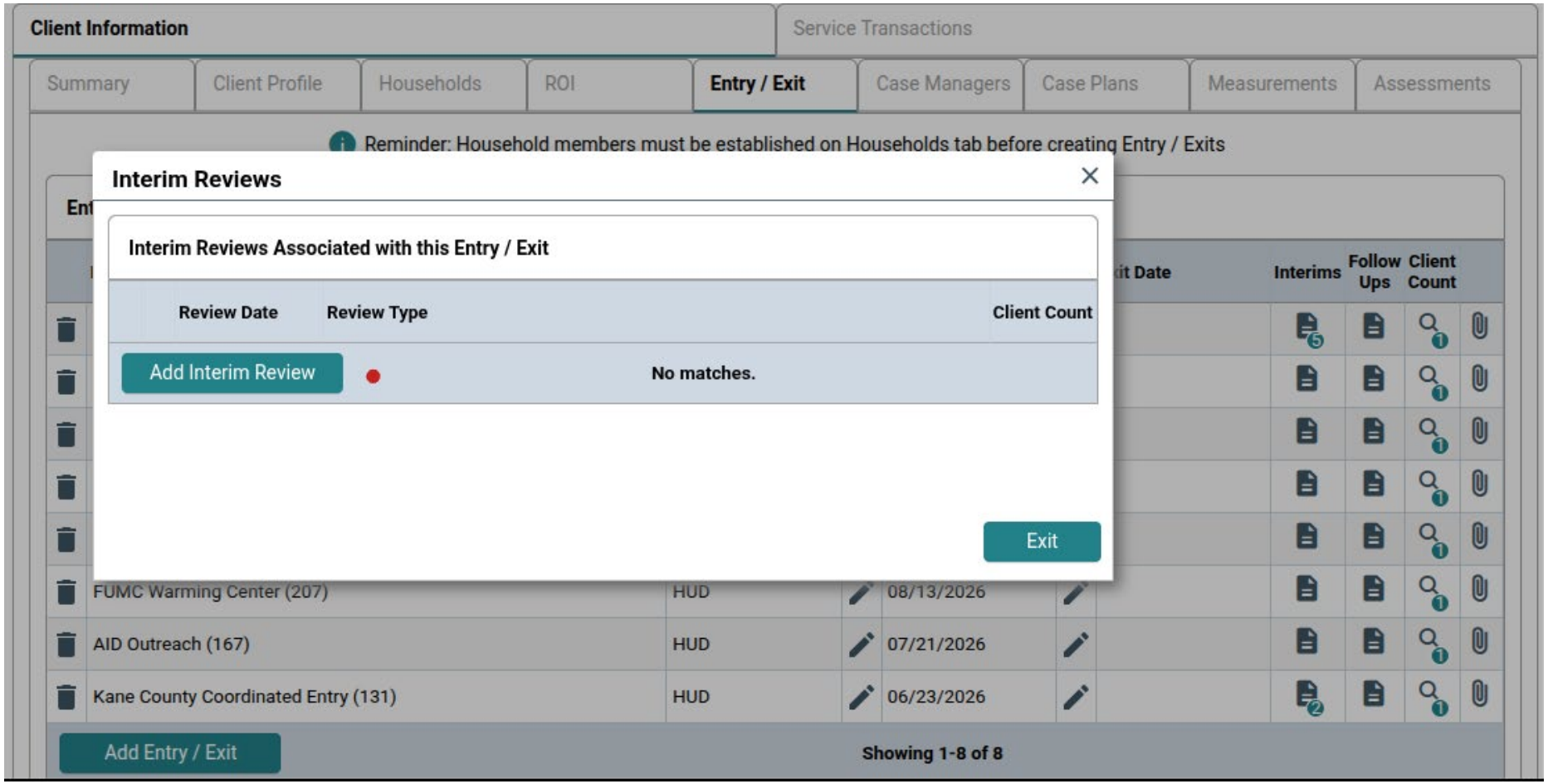


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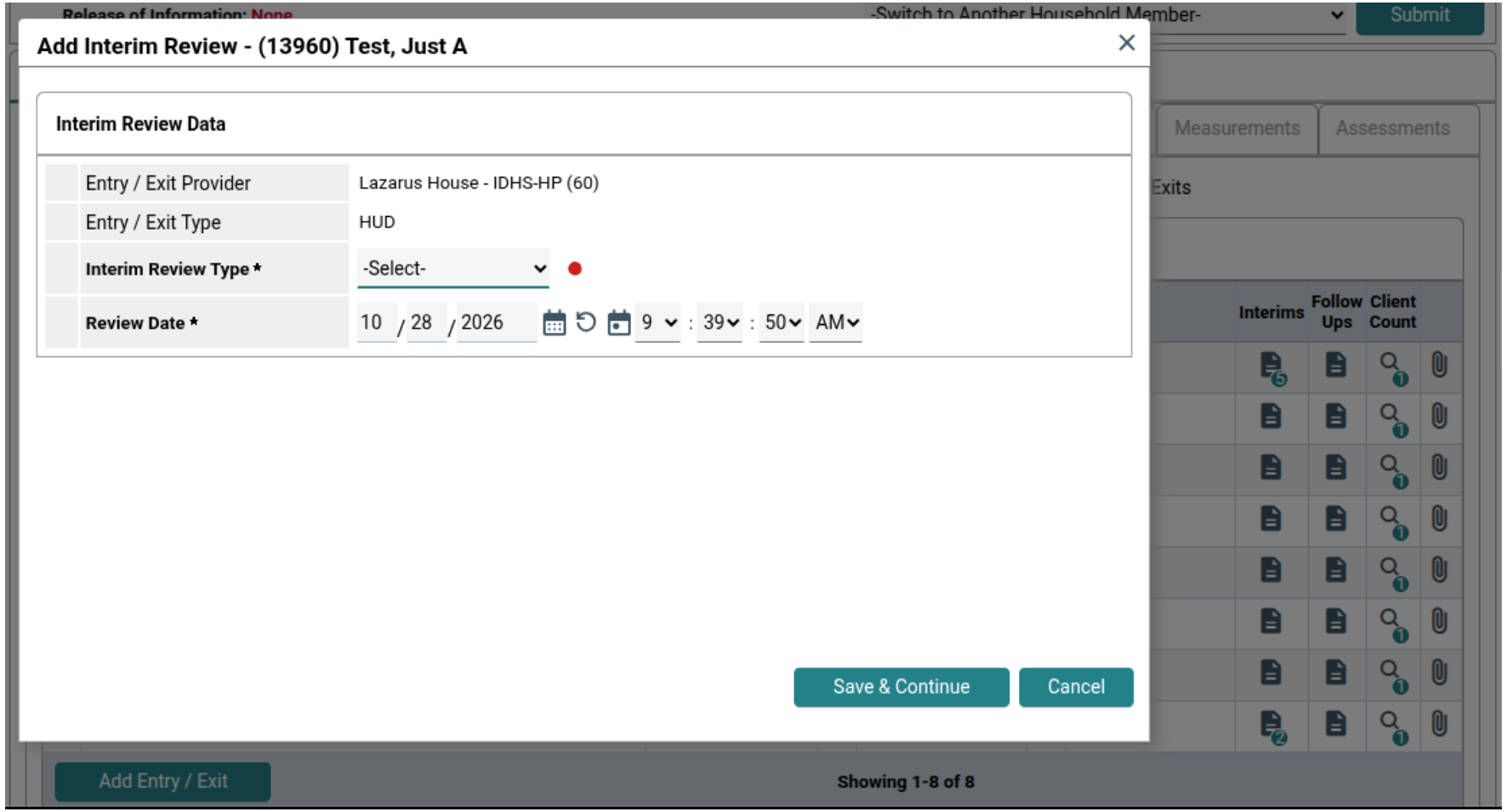
Intake, Assessment, and Income: Assessments in WellSky



Intake, Assessment, and Income: Assessments in WellSky

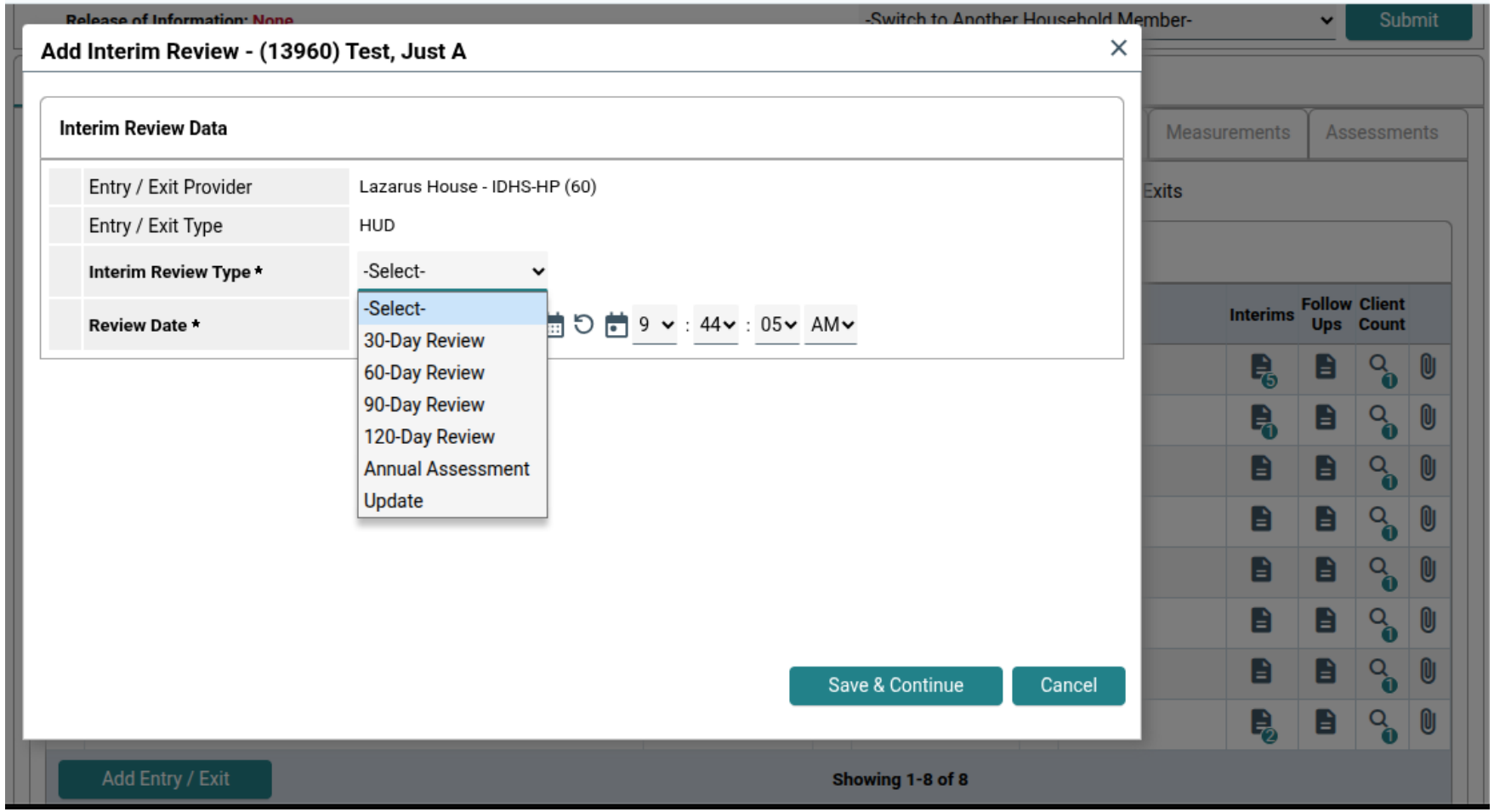


Intake, Assessment, and Income: Assessments in WellSky



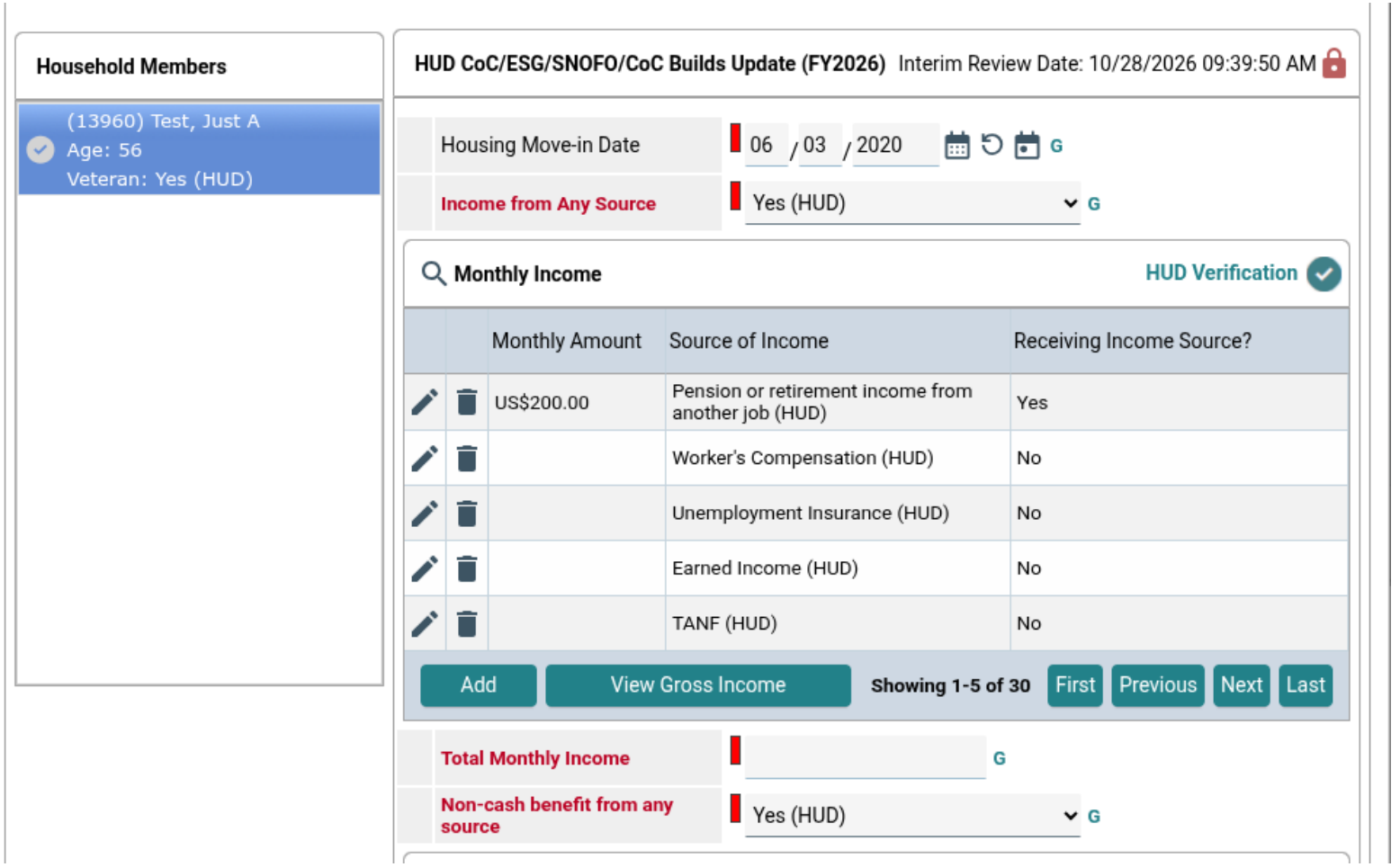
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Intake, Assessment, and Income: Assessments in WellSky

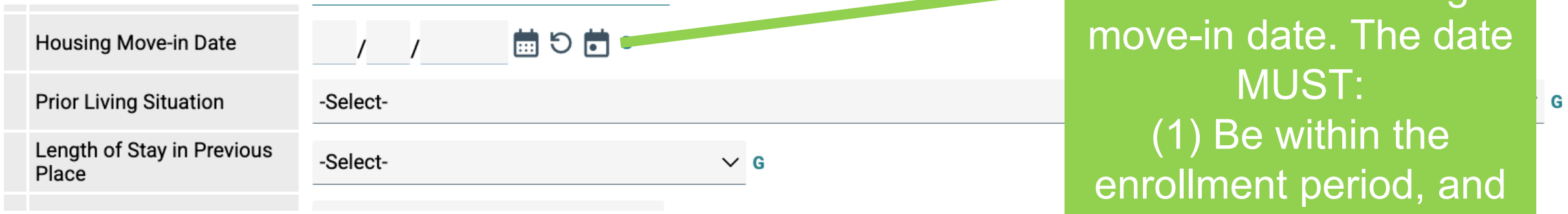


Intake, Assessment, and Income: Assessments in WellSky (Income)

WHY IT IS IMPORTANT:
Because income information is important for meeting funding criteria and HUD reporting purposes, make sure to update it any time there is a change. Income should be verified AT LEAST annually in the annual assessment, and ideally more often whenever there is a change!



Households, Disabilities, and Housing: Housing Move-In Date

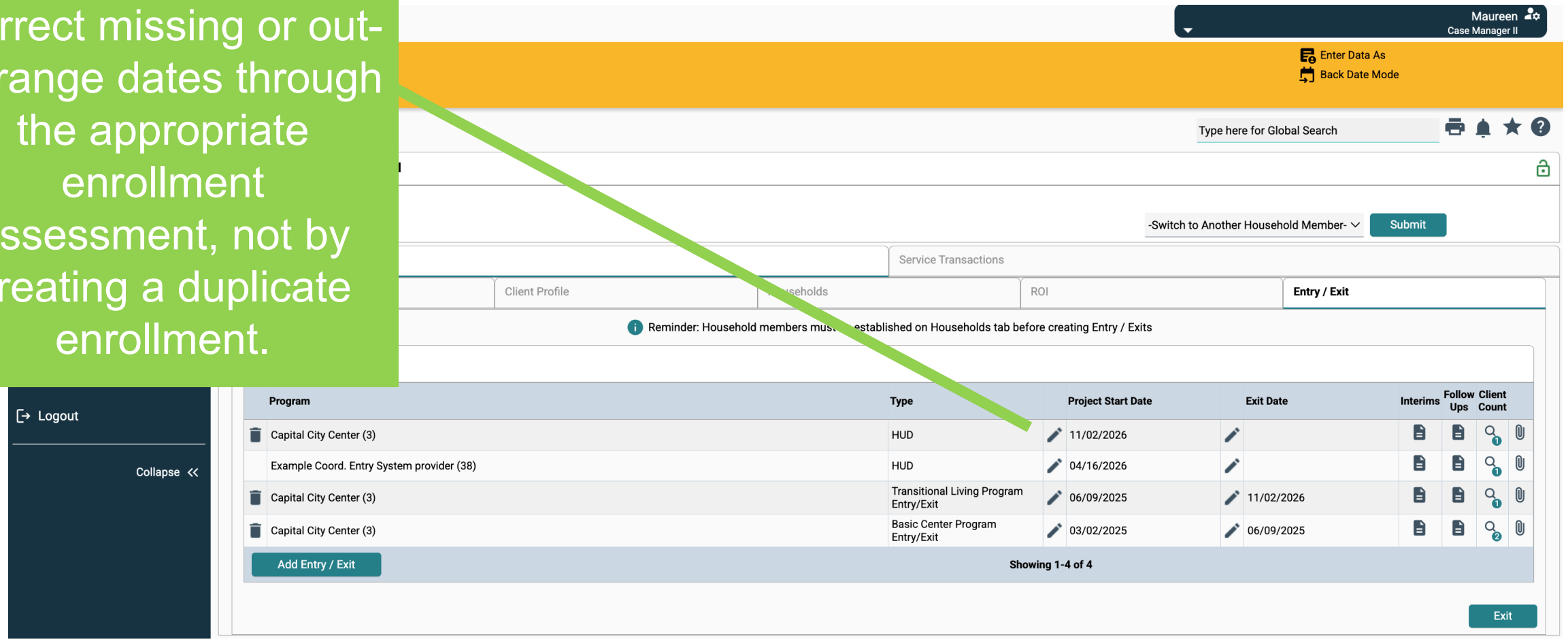


Make sure to properly document housing move-in date. The date MUST:
(1) Be within the enrollment period, and
(2) Should not occur before the entry date or after the exit date

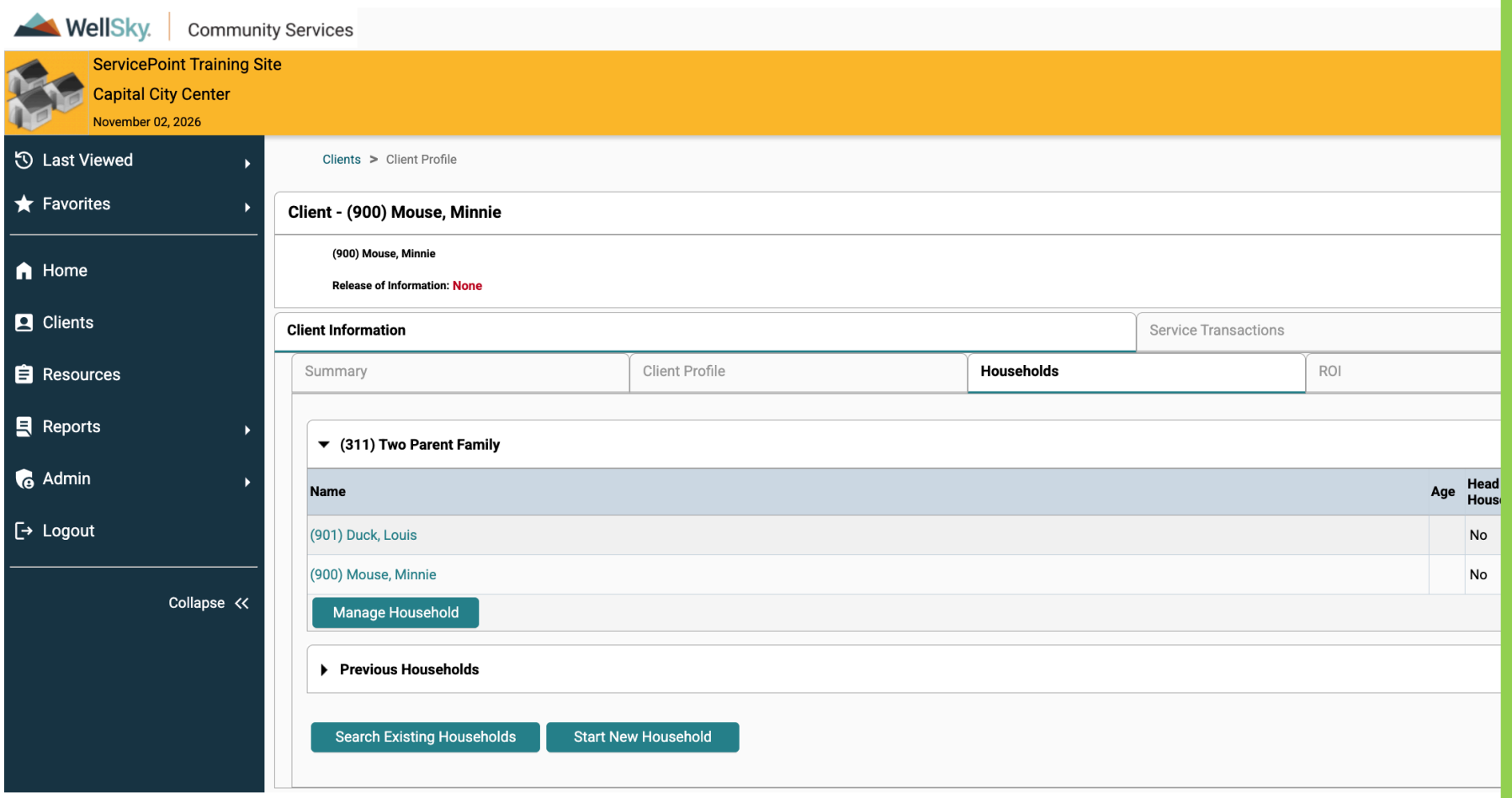
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Households, Disabilities, and Housing: Housing Move-In Date

Correct missing or out-of-range dates through the appropriate enrollment assessment, not by creating a duplicate enrollment.



Households, Disabilities, and Housing: Households and HOH



Every enrollment must have one designated Head of Household.

Assign each member's relationship to the Head of Household and include the correct household members in the enrollment.

Review household membership before changing or ending a relationship.

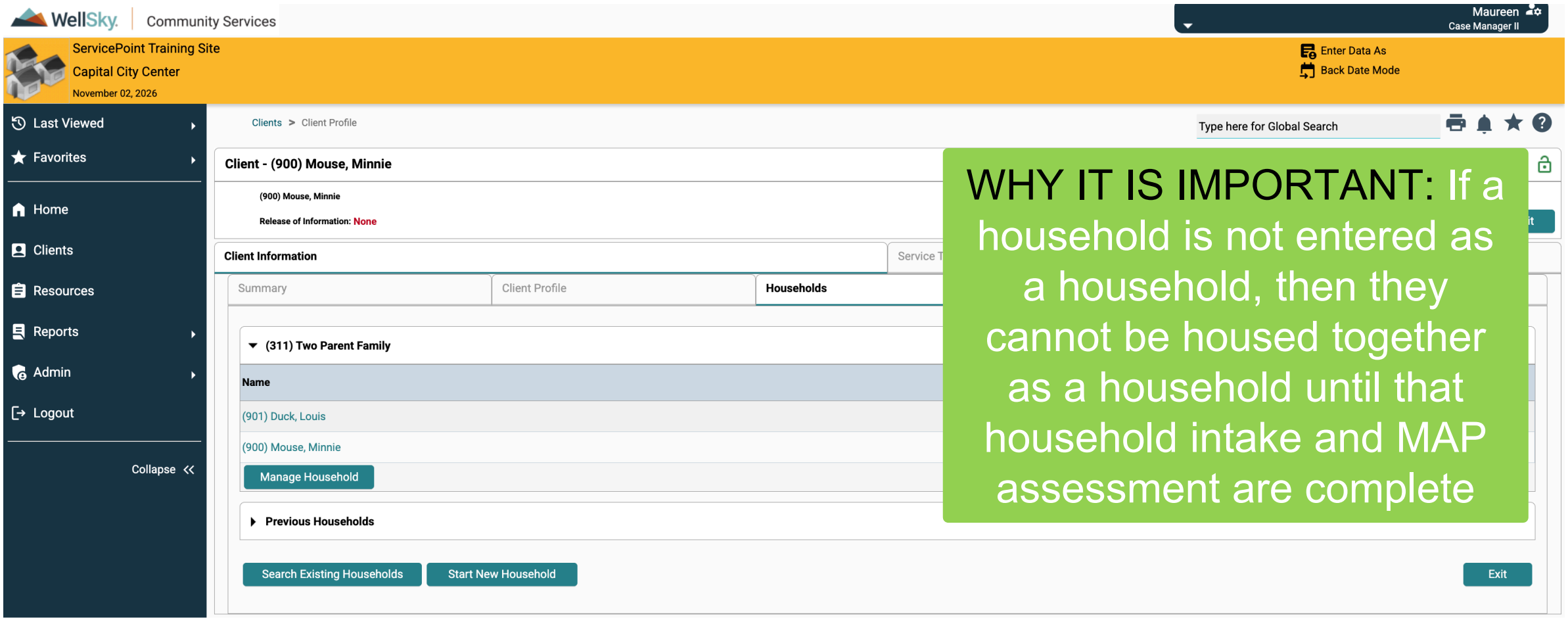
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Households, Disabilities, and Housing: Relationship to Head of Household

A head of household is one member of a household to whom all other household members can be associated. A household is a single individual or a group of persons who apply together to a continuum project for assistance and who live together in one dwelling unit, or, for persons who are not housed, who would live together in one dwelling unit if they were housed. There must be one Head of Household for each enrollment and there cannot be more than one Head of Household for any given enrollment.

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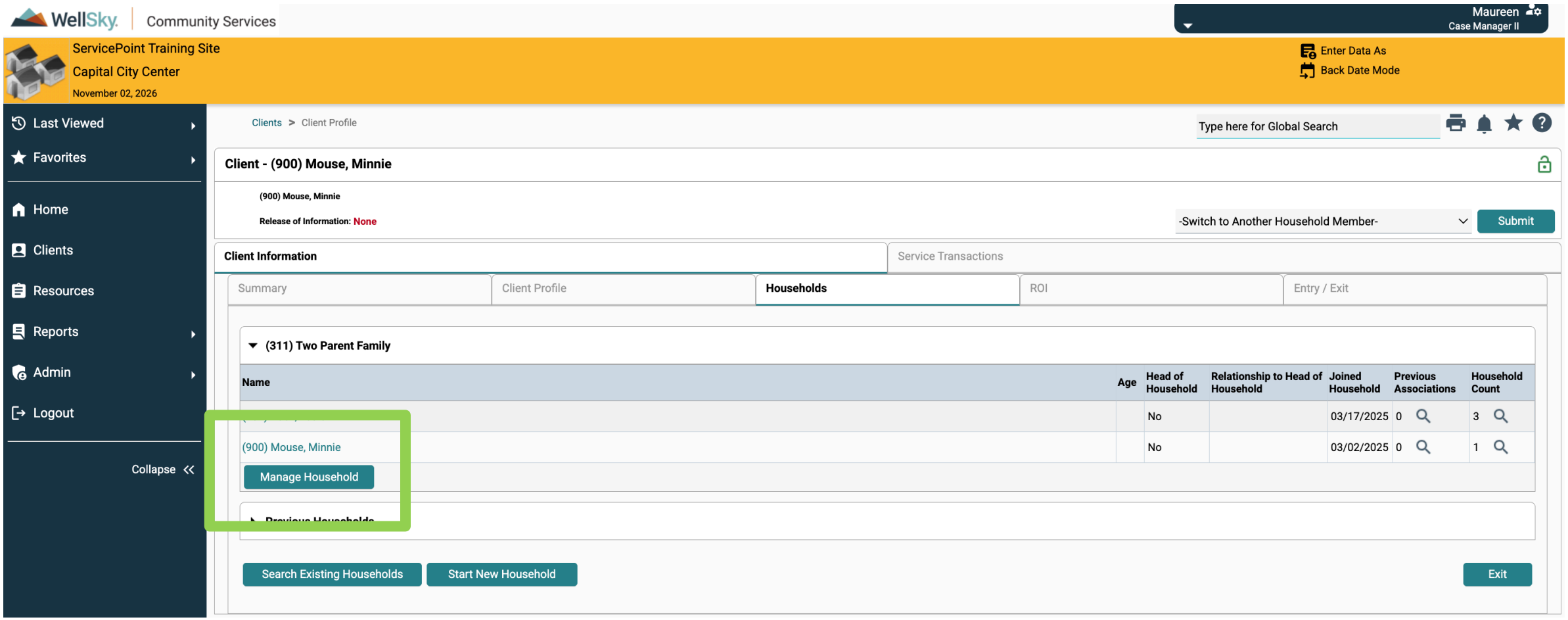
Households, Disabilities, and Housing: Households and HOH



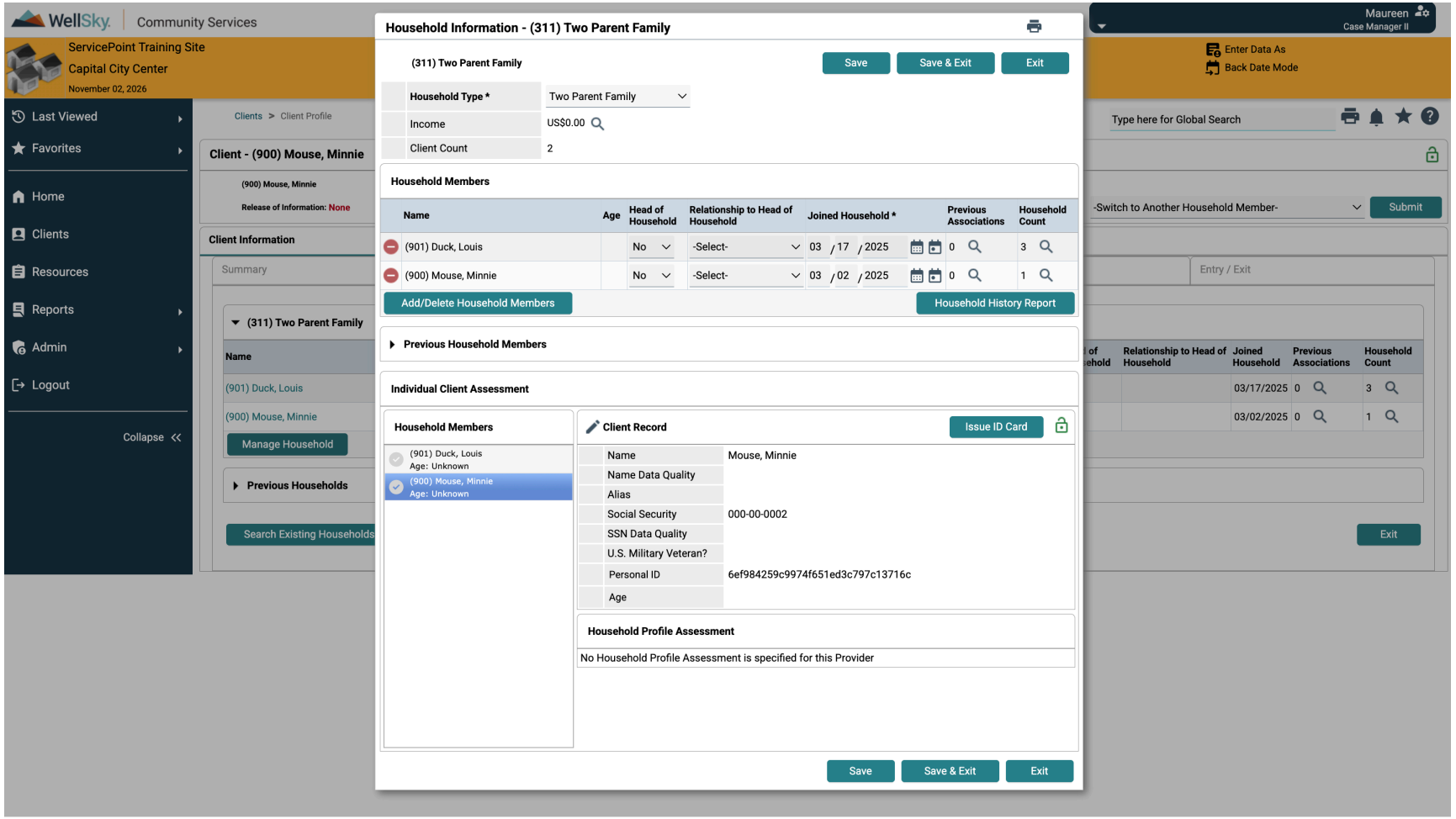
WHY IT IS IMPORTANT: If a household is not entered as a household, then they cannot be housed together as a household until that household intake and MAP assessment are complete

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Households, Disabilities, and Housing: Households and HOH in WellSky

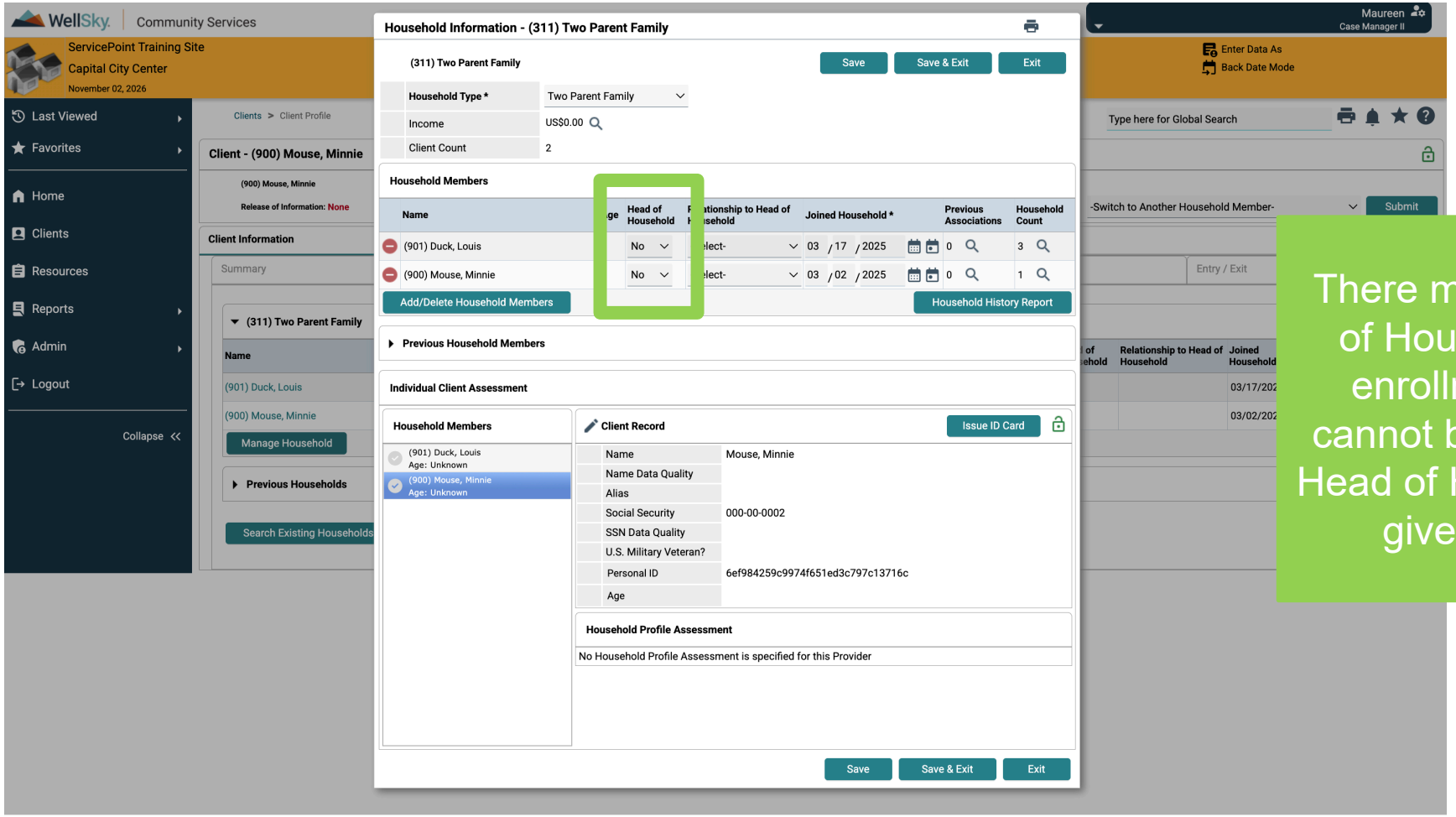


Households, Disabilities, and Housing: Households and HOH in WellSky



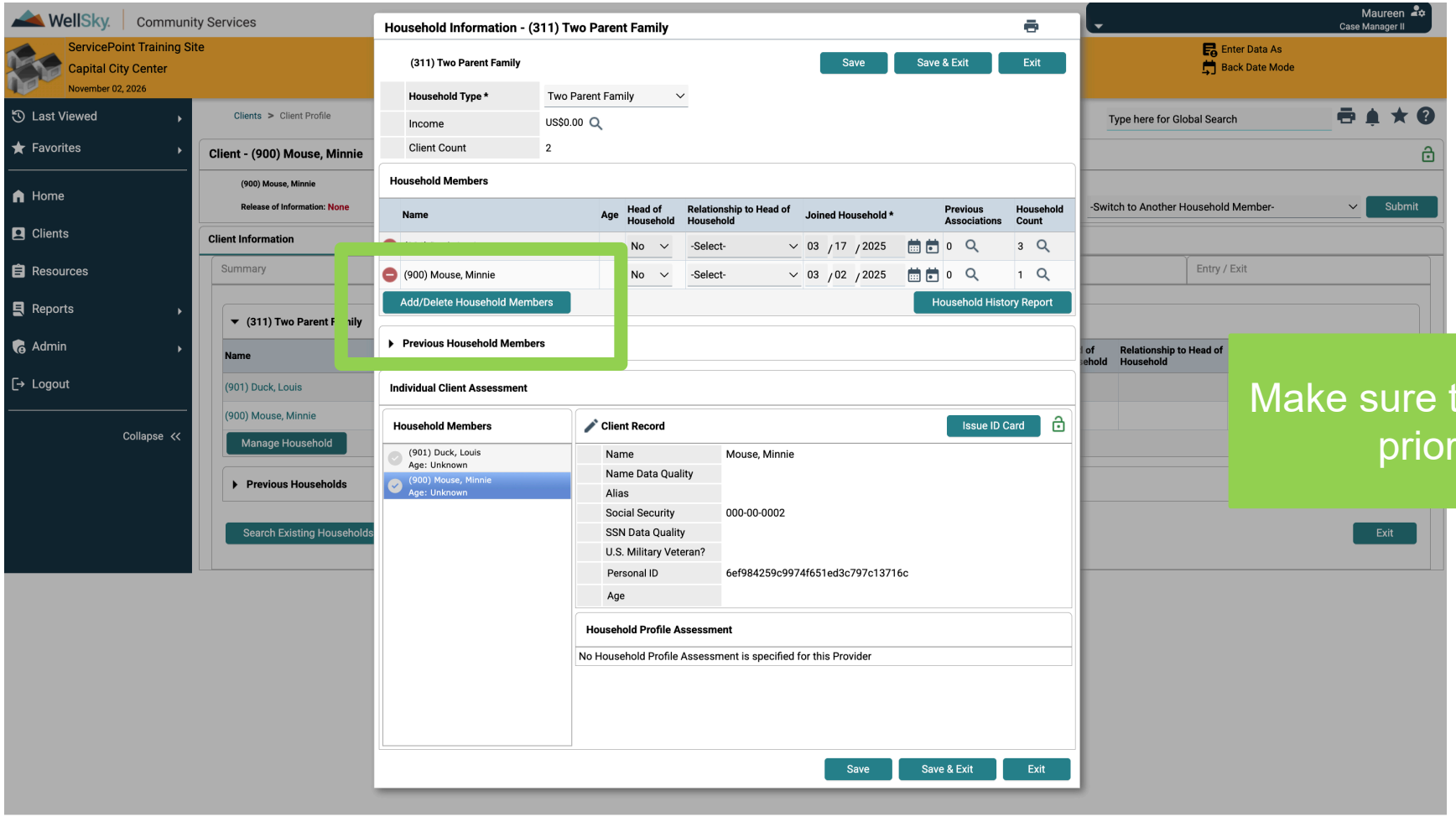
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Households, Disabilities, and Housing: Households and HOH in WellSky



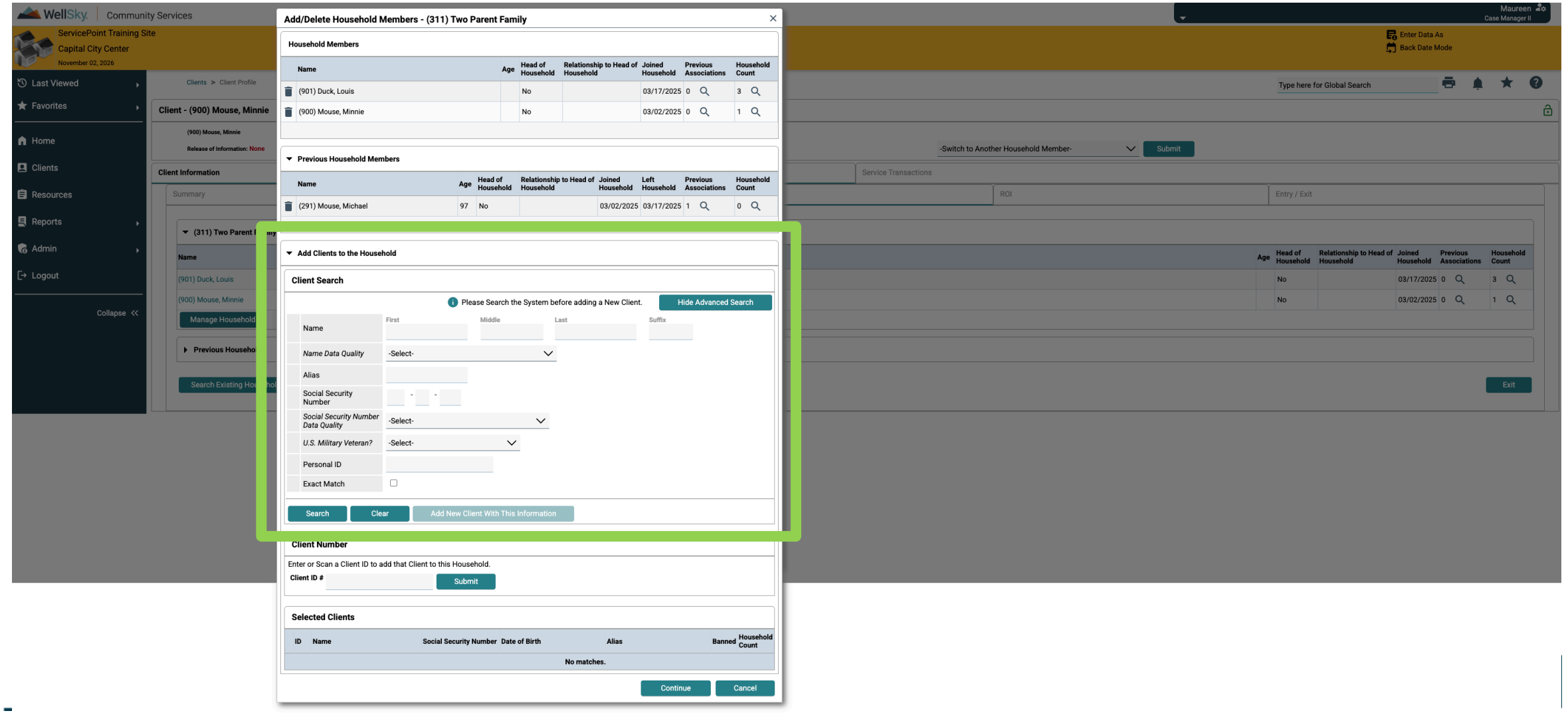
There must be one Head of Household for each enrollment and there cannot be more than one Head of Household for any given enrollment.

Households, Disabilities, and Housing: Households and HOH in WellSky

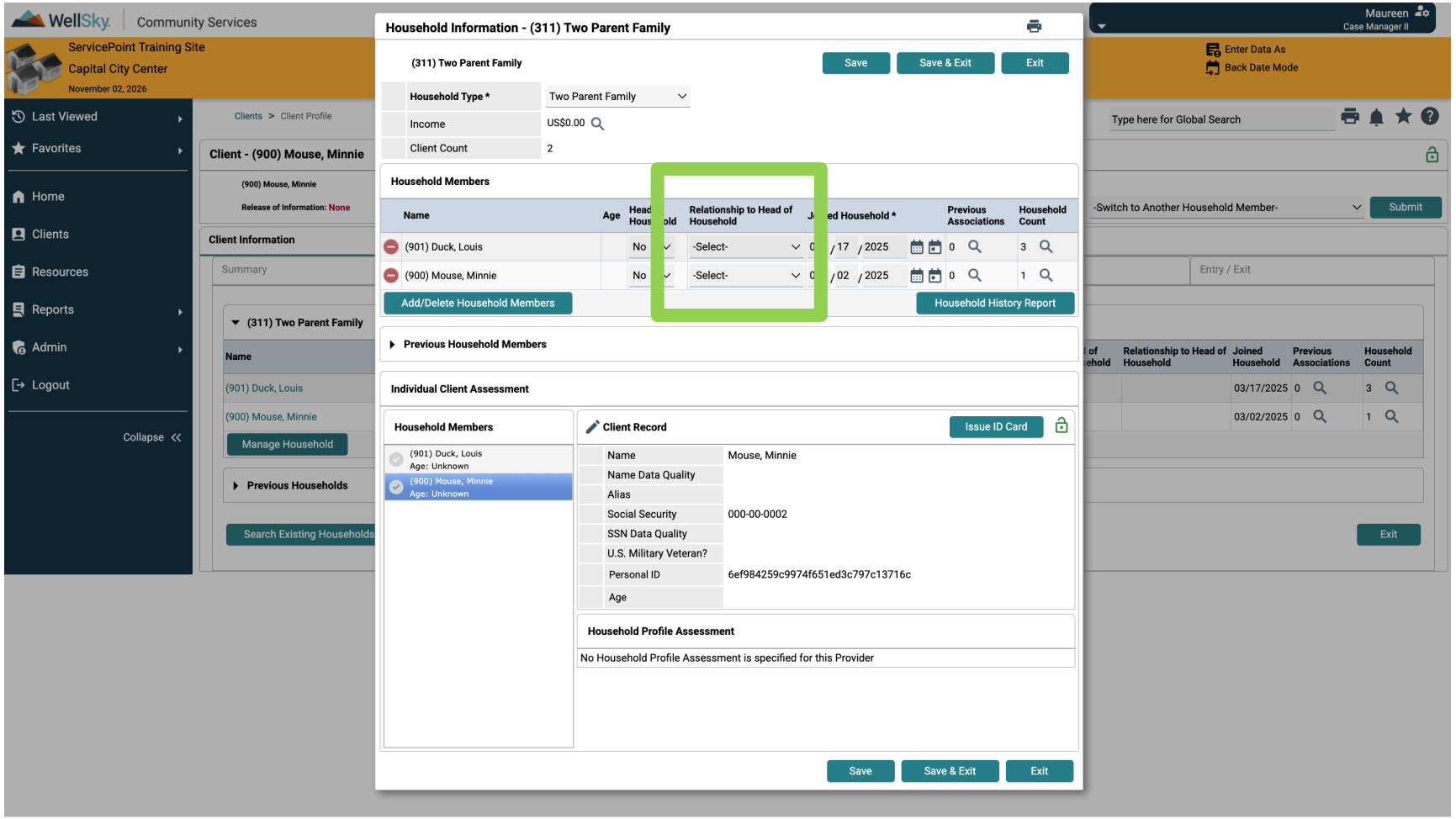


Make sure the household is set prior to enrolling!

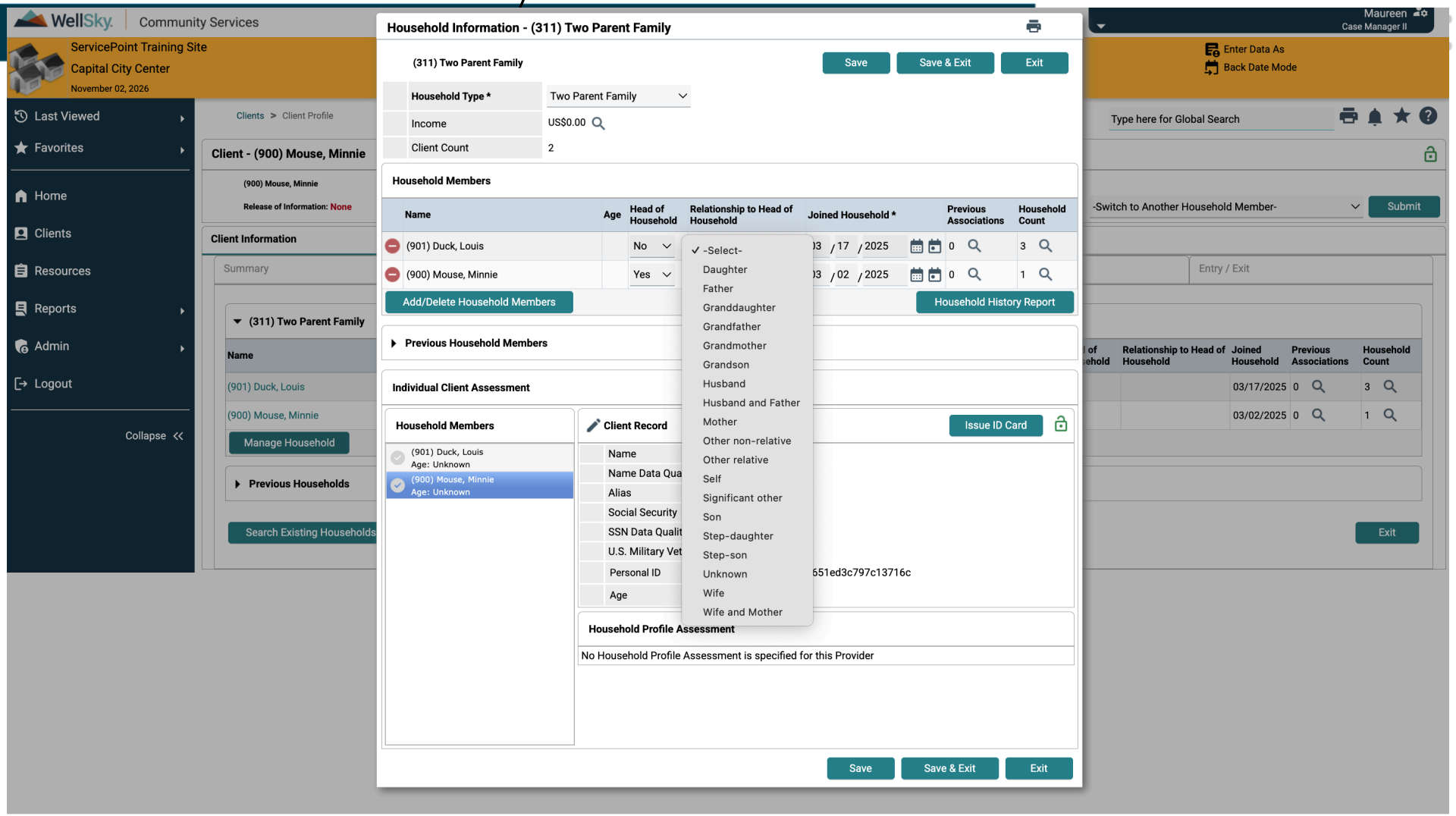
Households, Disabilities, and Housing: Households and HOH in WellSky



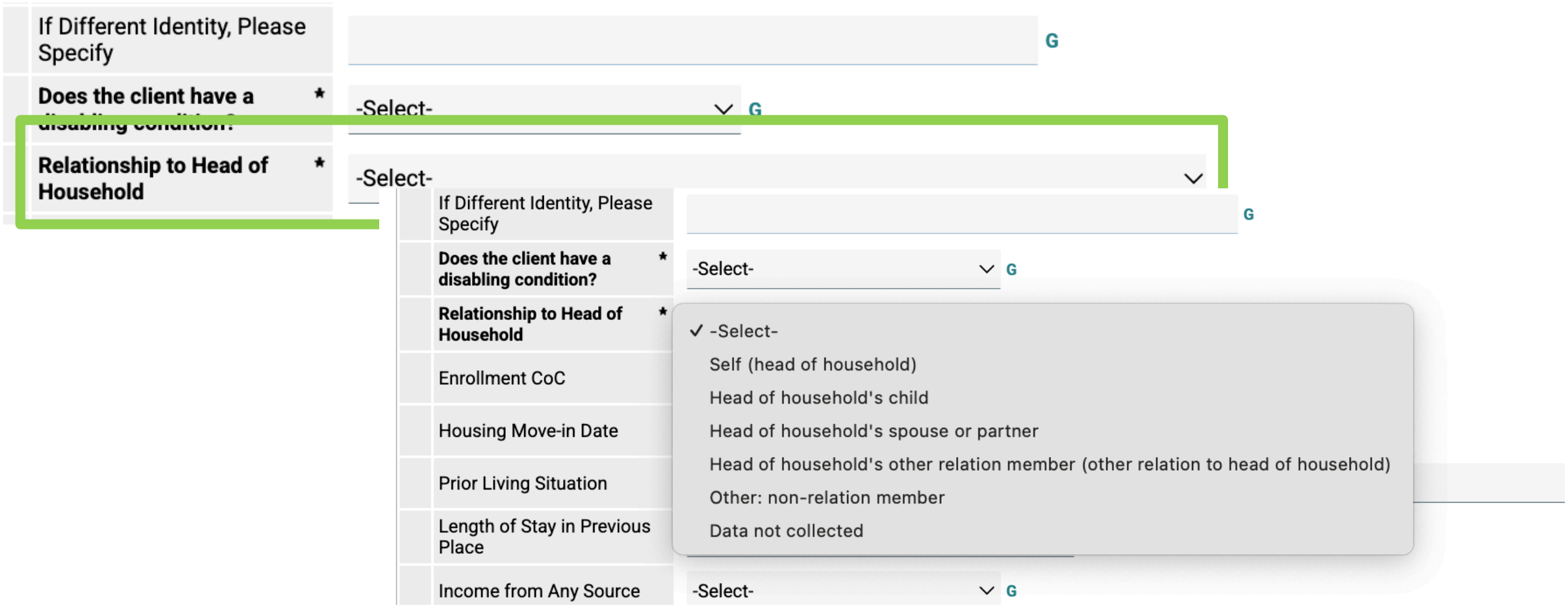
Households, Disabilities, and Housing: Households and HOH in WellSky



Households, Disabilities, and Housing: Households and HOH in WellSky

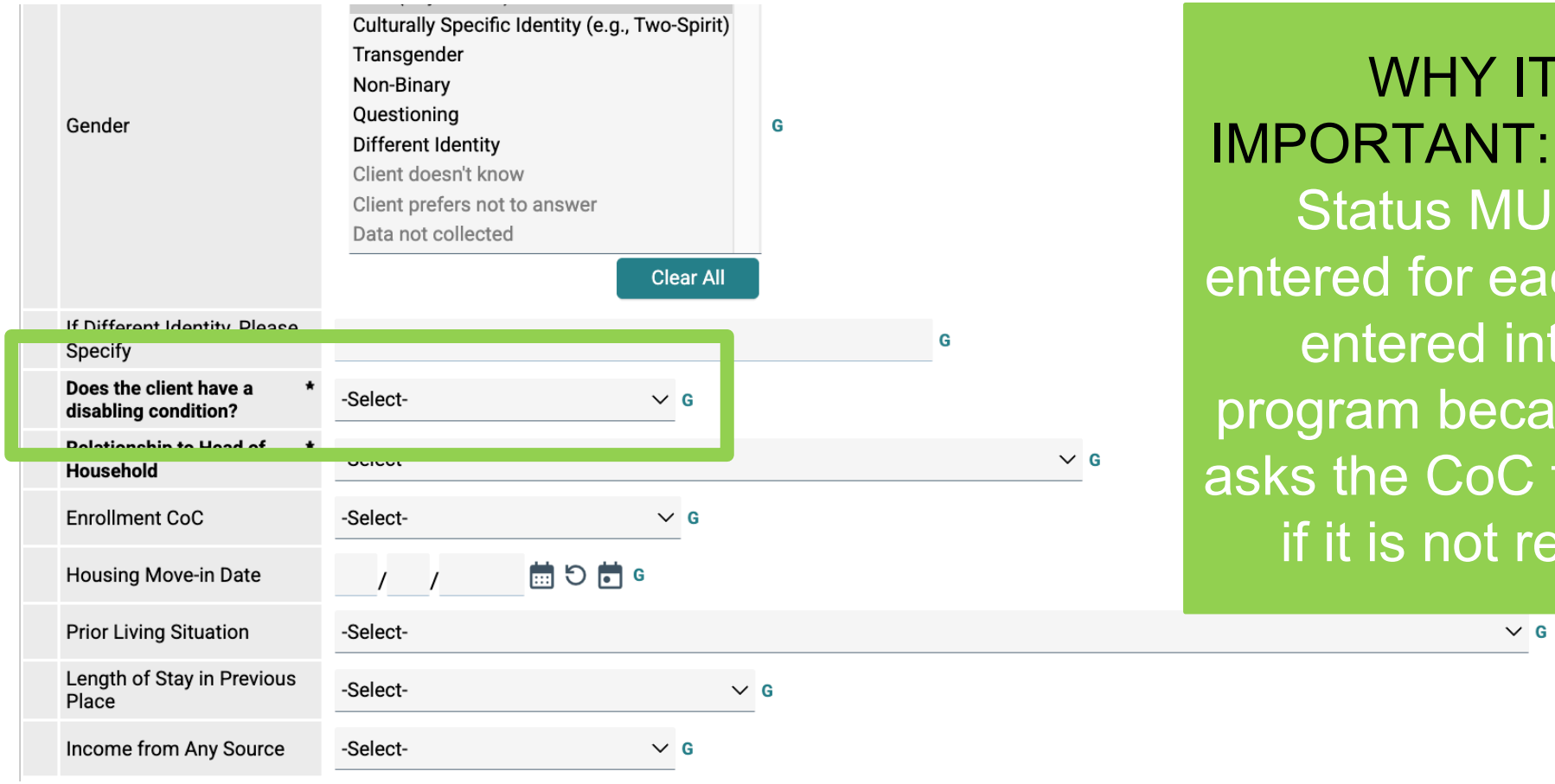


Universal Data Elements: Households in WellSky (When Creating a New Client Enrollment)



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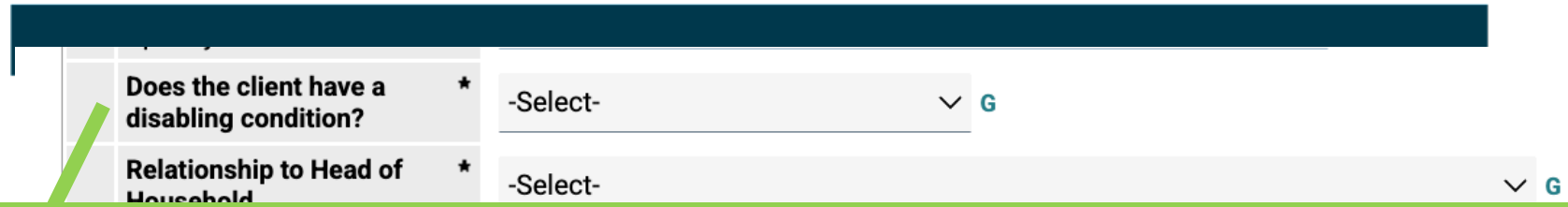
Households, Disabilities, and Housing: Disabling Conditions



WHY IT IS IMPORTANT: Disability Status MUST be entered for each person entered into any program because HUD asks the CoC for it even if it is not required

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Households, Disabilities, and Housing: Disabling Conditions



A physical, mental, or emotional impairment, including an impairment caused by alcohol or drug abuse, post-traumatic stress disorder, or brain injury that:

(1)Is expected to be long-continuing or of indefinite duration;

(2) Substantially impedes the individual's ability to live independently; AND

(3) Could be improved by the provision of more suitable housing conditions.

OR

A developmental disability

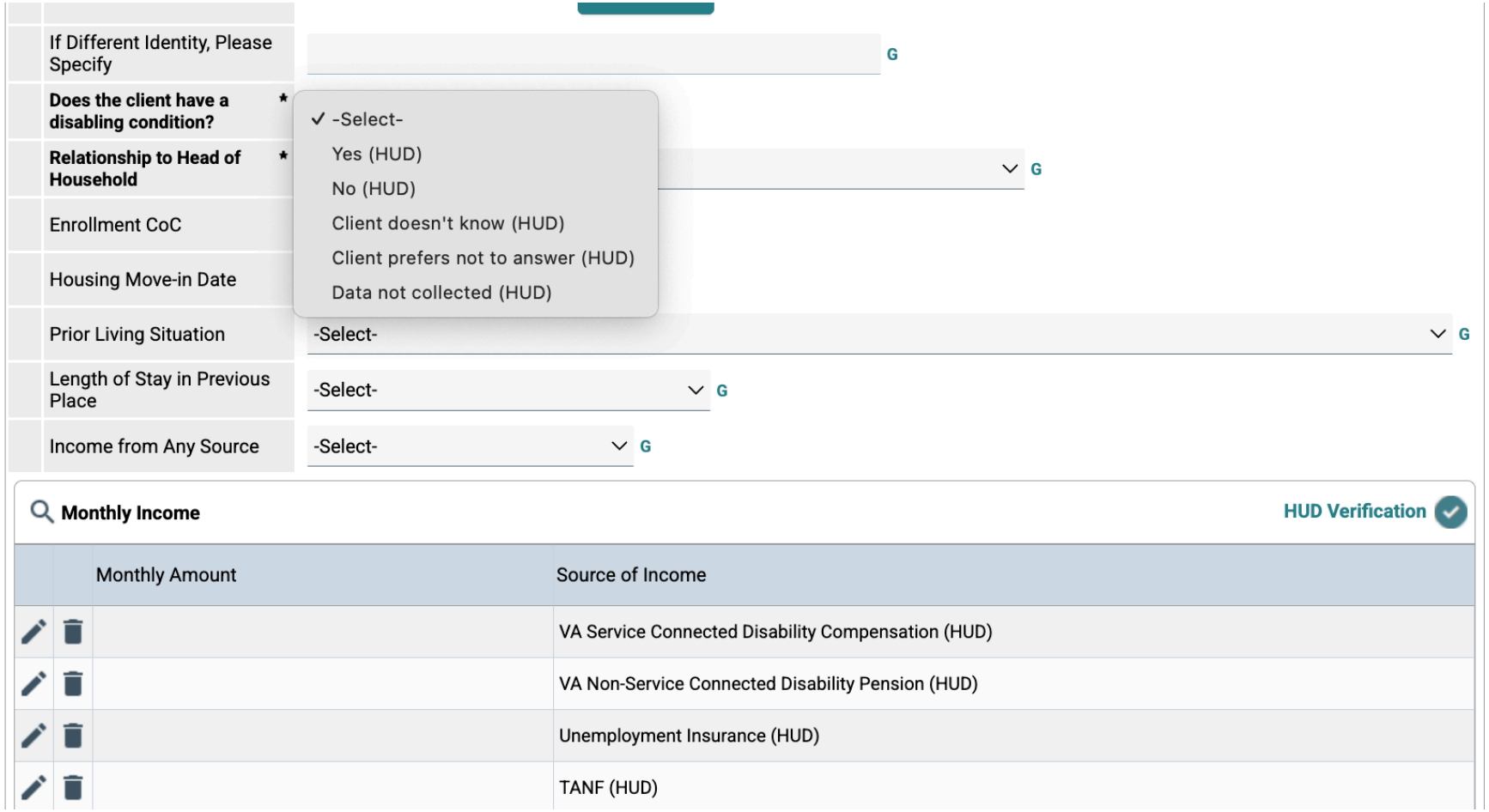
OR

The disease of acquired immunodeficiency syndrome (AIDS) or any condition arising from the etiologic agency for acquired immunodeficiency syndrome (HIV)

OR

A veteran who is disabled by an injury or illness that was incurred or aggravated during active military service

Households, Disabilities, and Housing: Disabling Conditions in WellSky



Households, Disabilities, and Housing: Disabilities

Physical Disability: whether clients have a physical disability which contribute to their experience of homelessness or may be a factor in housing.

Definition: a physical impairment.

If yes, then requires there whether the physical disability is expected to be of long-continued and indefinite duration and substantially impair the client's ability to live independently.

Developmental Disability: whether client has a developmental disability which contributes to their experience of homelessness or may be a factor in housing.

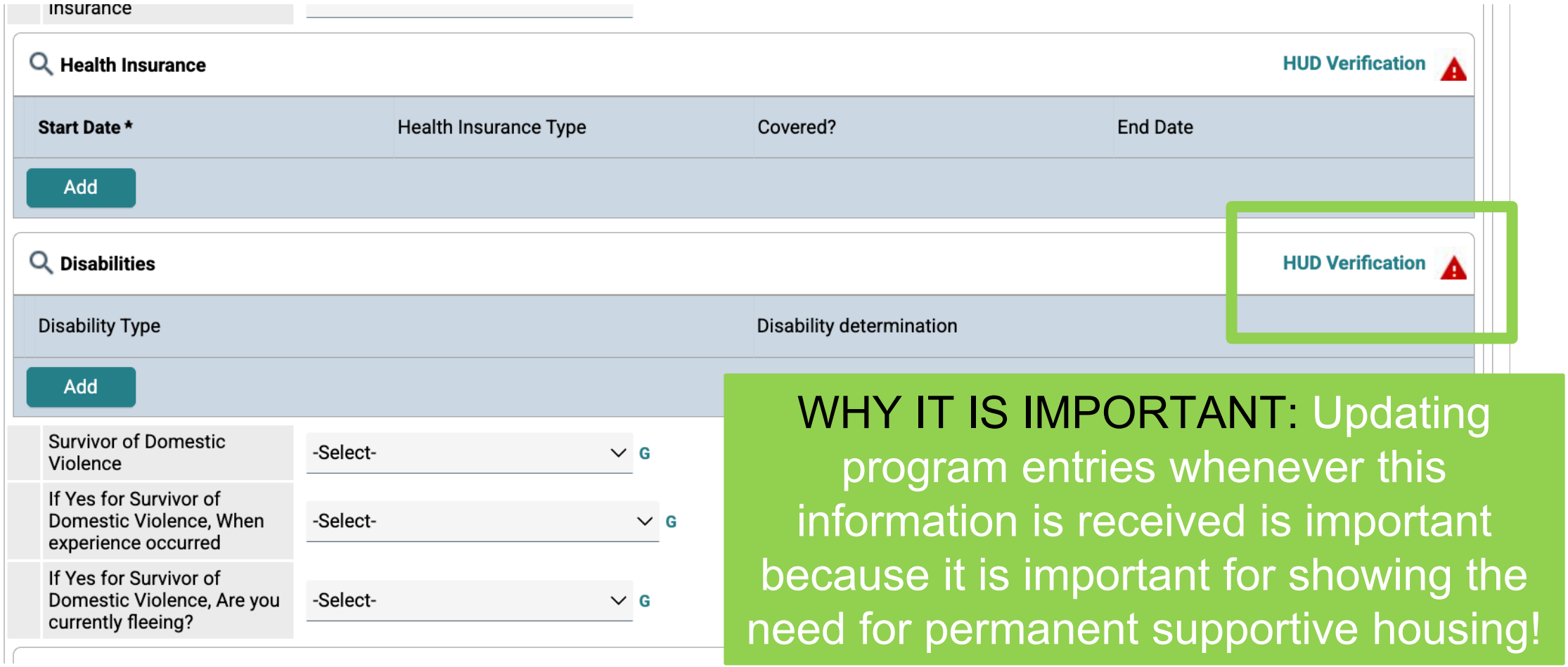
Definition: a severe, chronic disability that is attributed to a mental or physical impairment (or combination of physical and mental impairments) that occurs before 22 years of age and limits the capacity for independent living and economic self-sufficiency.

Chronic Health Condition: whether clients have any disabling special needs which contribute to their experience of homelessness or may be a factor in housing

Definition: a diagnosed condition that is more than three (3) months in duration and is either not curable or has residual effects that limit daily living and required adaptation in function or special assistance.

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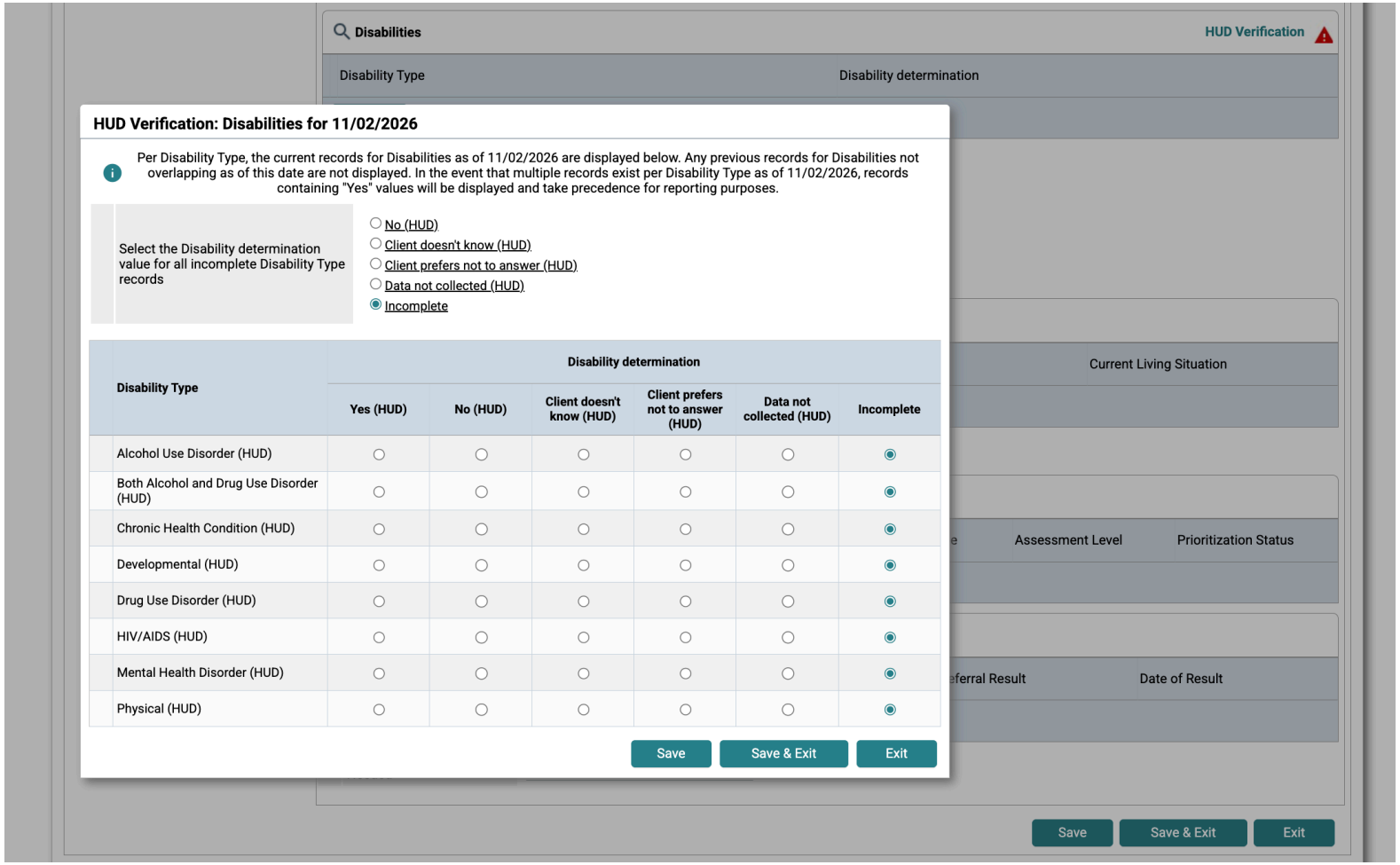
Households, Disabilities, and Housing: Disabilities in WellSky



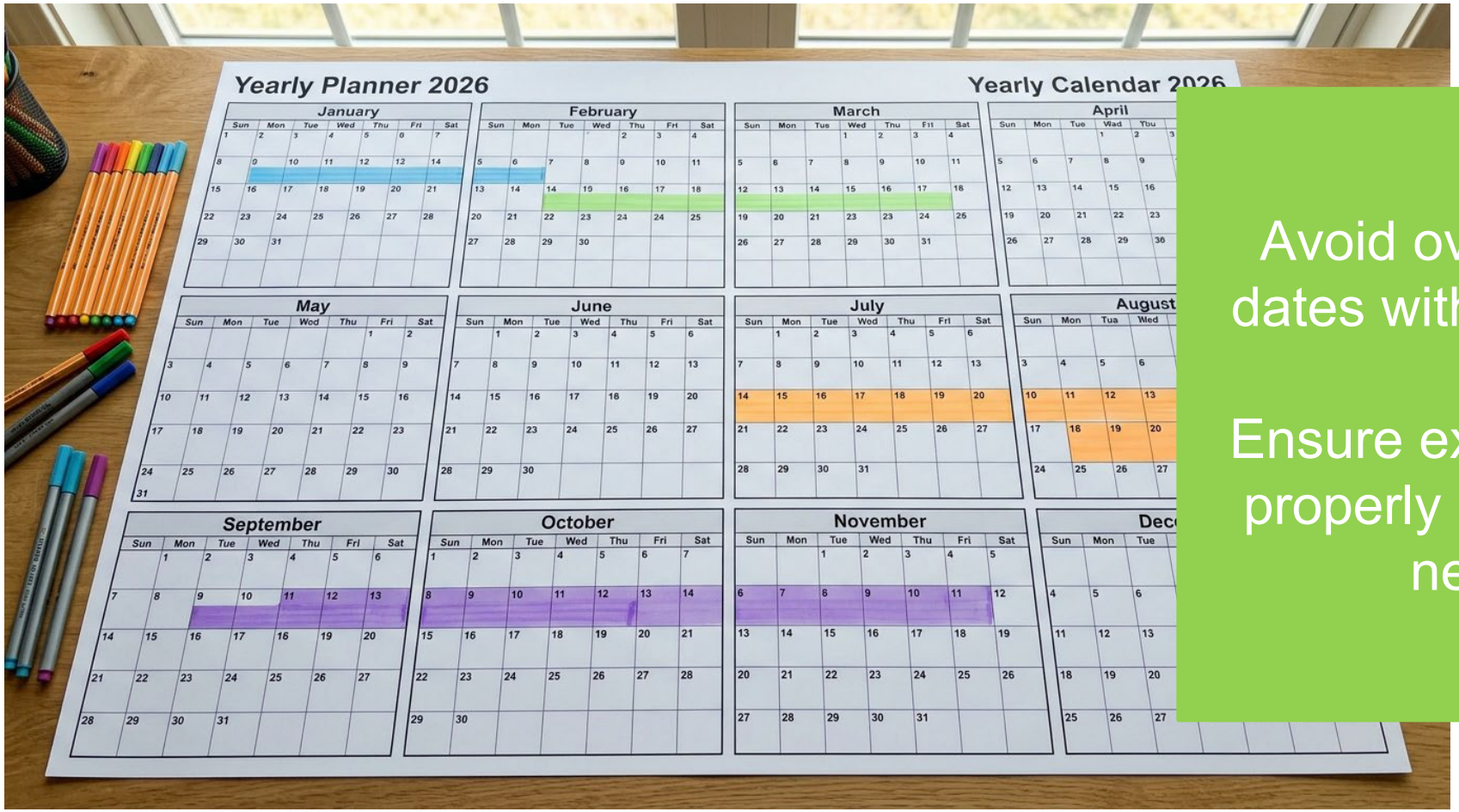
WHY IT IS IMPORTANT: Updating program entries whenever this information is received is important because it is important for showing the need for permanent supportive housing!

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Households, Disabilities, and Housing: Disabilities in WellSky



Enrollment Management: Overlapping Enrollments

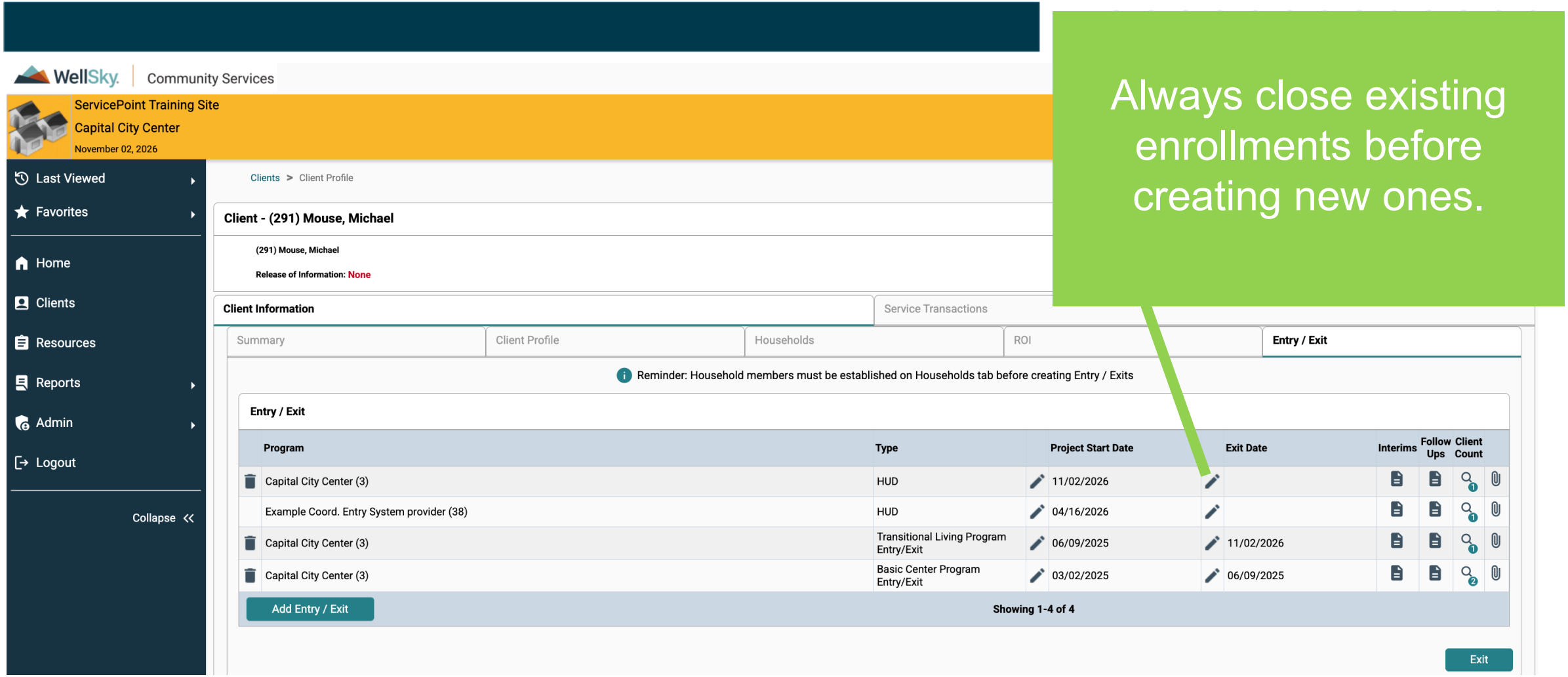


Avoid overlapping enrollment dates within the same program.

Ensure existing enrollments are properly exited before creating new enrollments.

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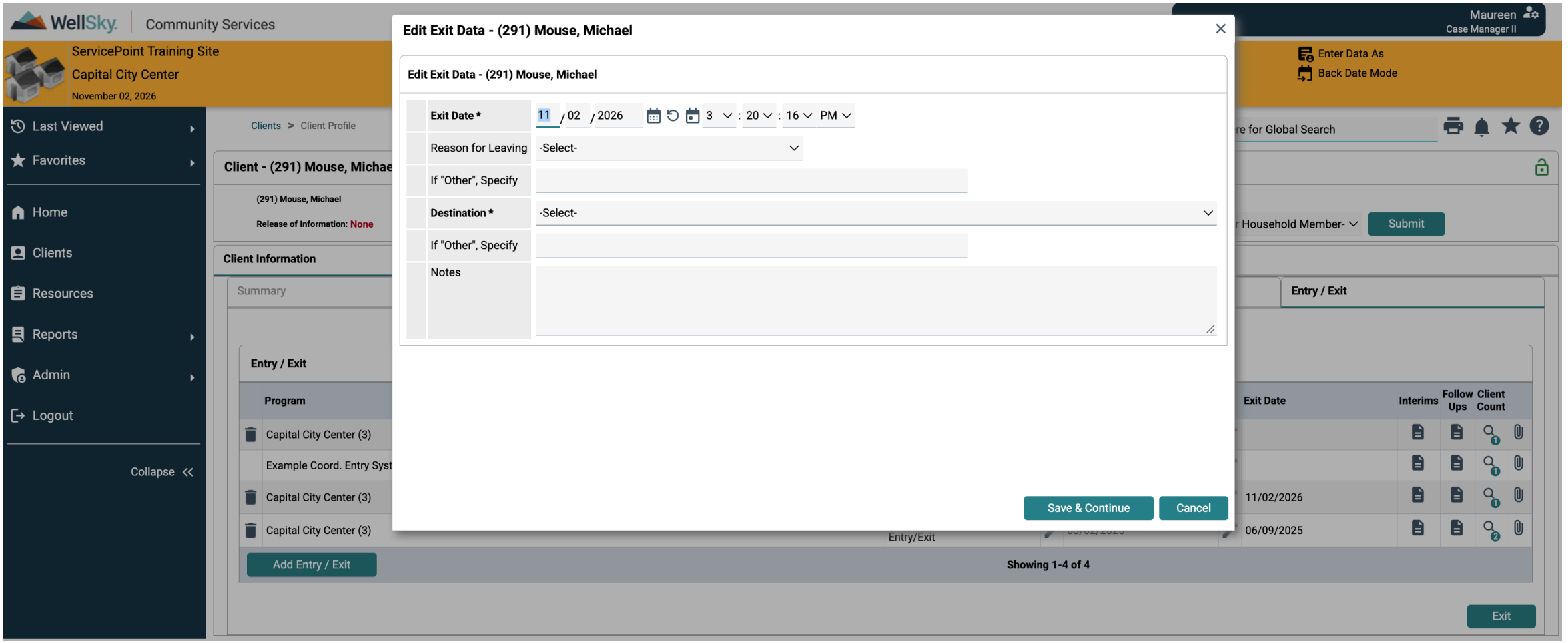
Enrollment Management: Overlapping Enrollments



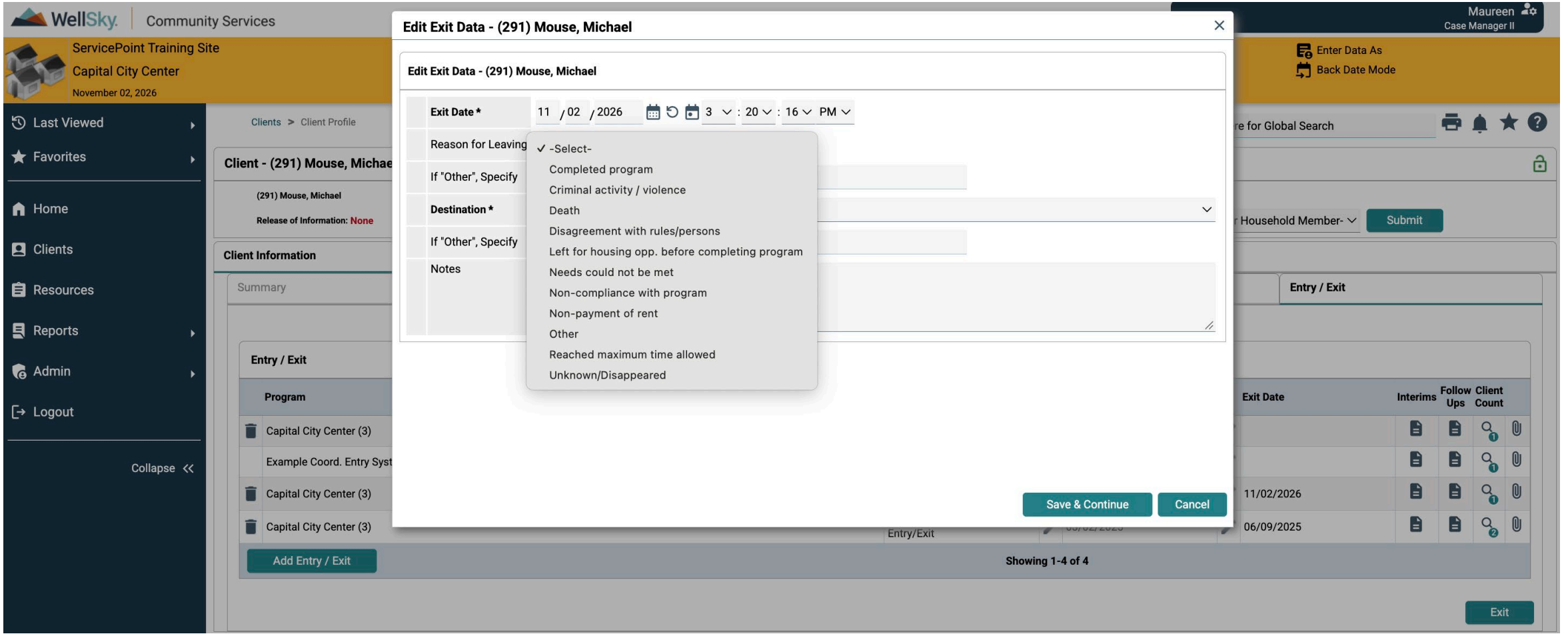
Always close existing enrollments before creating new ones.

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Enrollment Management: Overlapping Enrollments



Enrollment Management: Overlapping Enrollments



Enrollment Management: Overlapping Enrollments

