

Creating a New Client Profile

- 1) Before creating a new profile, check if the person is already in HMIS:
 - a. Enter the first 3 letters of the client's first and last name (or date of birth, or last four numbers of their social security number) in the search bar. Click on "SEARCH".
- 2) If you are unable to find the client, click 'Add Client' to create a new profile.



The screenshot shows a web interface for searching clients. At the top right, there is a button labeled "ADD CLIENT" with a plus sign icon. Below this is a search bar and a "SEARCH" button. An orange arrow points to the "ADD CLIENT" button.

Release of Information

NOTE: A Release of Information is required for each profile that is created therefore the system will display *'Please fill in the Release of Information form'* at the bottom of the profile screen.

For more information, see the job aids [Understanding ROI Categories](#) and [How to Add ROIs for a Household](#) for detailed instructions.

Completing the Profile

Complete all data fields. If the client does not know or the client refuses to respond to the question, select "Client doesn't know" or "Client refused"

NOTE: **Contact Information** should be placed under the client "Contact" tab

CLIENT PROFILE	
Social Security Number	XXX - XX - XXXX 
Quality of SSN	Data not collected 
Last Name	Last
First Name	First
Quality of Name	Full name reported 
Quality of DOB	Full DOB Reported 
Date of Birth	01/01/1980 Adult. Age: 43
Middle Name	Tim
Suffix	Sr. 
Alias	

1) Social Security Number

- a. To support the unique identification of each person served. The SSN greatly facilitates the process of identifying clients who have been served and is required by all mainstream programs. The SSN also allows programs to de-duplicate client records.
- b. The SSN is considered a key Unique Identifier – more useful than Name and DOB
- c. **Quality of SSN**
 - i. Partial SSN should be recorded, missing digits replaces with “0”s.
 - ii. If SSN is not available put all “0”s and select the appropriate descriptor.

2) Last Name/First Name

- a. Full Legal Name required
 - i. Nicknames and street names can be recorded in **Alias** below
- b. To support the unique identification of each client served and eliminate duplicates
- c. Key Unique Identifier – along with SSN and DOB
- d. **Quality of Name**
 - i. Select 'Partial, street name, or code name reported' in any of the following circumstances:
 1. A partial, short, or nickname was used instead of the full first name.
 2. A street name or code name was used for street outreach clients at initial intake and until the client was able to supply their full legal name.
 3. A name modification was used for security reasons; or
 4. For any other reason the name does not match the client’s full name as it would appear on identification.

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3) Date of Birth

- a. To calculate the age of clients served at time of project start or at any point during project enrollment.
- b. The DOB is considered a key Unique Identifier – along with SSN and Name
- c. **Quality of DOB**
 - i. 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. Select "Approximate or partial DOB reported."
 - ii. If a client is not able to estimate their age within one year of their actual age, select "Client doesn't know." If the client is able to provide their birth year, but refuses to provide their birthday and month, record an approximate date as indicated above and indicate that the response is "Approximate or partial DOB reported." Select "Client refused" when a client refuses to provide their birth year. "Client doesn't know," "Client refused," and "Data not collected" are explanations for missing DOB data. None of these three options are valid in conjunction with a valid or approximated date entered in "Date of Birth".

4) Middle Name or Initial

- a. Helpful but input is optional

5) Suffix

- a. When necessary, Select from the dropdown box

6) Alias

- a. An alias can be any name used in place of a birth name. While there may be legitimate reasons for using another name, it is often they have a short nickname or street name they go by instead of their birth name.

Pronouns	Select	▼
Is the Client Deceased?	<input type="checkbox"/>	
Gender assigned at birth	Male	▼
Gender Identity	Male	▼
Sexual Orientation	Select	▼
Ethnicity	Non-Hispanic/Non-Latin(a)(o)(x)	▼
Race	Native Hawaiian or Pacific Islander	▼

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7) Pronouns

- a. Using someone's correct pronouns is a way to show you respect them and helps create an inclusive environment. Their use has a direct impact on a client's well-being and belonging.

8) Is the Client Deceased?

- a. This is not an issue or applicable when creating new client profiles

9) Gender assigned at birth

- a. To distinguish from a client's gender identity.

10) Gender Identity

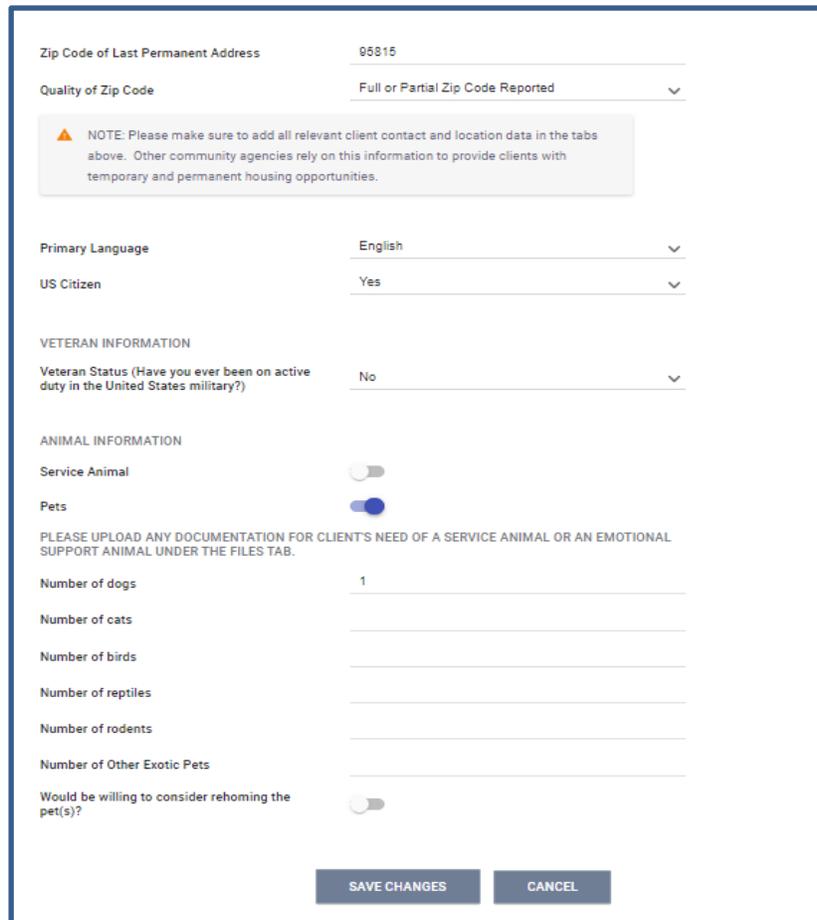
- a. To indicate client's self-identification of one or more of the gender categories. Supports system planning, and local and national understanding of who is experiencing homelessness.
- b. Multiple Gender Identities can be selected from the drop-down box.
- c. Do not guess – the client must state their own personal gender identity

11) Ethnicity

- a. To indicate clients who do and do not identify themselves as Hispanic or Latino.
- b. Supports system planning, and local and national understanding of who is experiencing homelessness.
- c. Do not guess – the client must state their own ethnicity

12) Race

- a. Supports system planning, and local and national understanding of who is experiencing homelessness.
- b. Multiple Races can be selected from the drop-down box.
- c. Do not guess – the client must state their own race



Zip Code of Last Permanent Address 95815

Quality of Zip Code Full or Partial Zip Code Reported

NOTE: Please make sure to add all relevant client contact and location data in the tabs above. Other community agencies rely on this information to provide clients with temporary and permanent housing opportunities.

Primary Language English

US Citizen Yes

VETERAN INFORMATION

Veteran Status (Have you ever been on active duty in the United States military?) No

ANIMAL INFORMATION

Service Animal

Pets

PLEASE UPLOAD ANY DOCUMENTATION FOR CLIENT'S NEED OF A SERVICE ANIMAL OR AN EMOTIONAL SUPPORT ANIMAL UNDER THE FILES TAB.

Number of dogs 1

Number of cats

Number of birds

Number of reptiles

Number of rodents

Number of Other Exotic Pets

Would be willing to consider rehoming the pet(s)?

SAVE CHANGES CANCEL

13) Zip Code of Last Permanent Address

- a. Supports system planning, and local and national understanding of who is experiencing homelessness.
- b. Client location data is very valuable and key to resource planning
- c. **Quality of Zip Code**
 - i. Full or Partial Zip Code accepted

14) Primary Language

- a. Language that someone uses most frequently to communicate with. It is the language a person uses in most situations.
- b. Usually their first language learned, but not always.

15) US Citizen

- a. Supports system planning, and local and national understanding of who is experiencing homelessness.

16) Veteran Status

- a. To indicate whether clients are veterans of the United States armed forces. Allows for an accurate count of how many veterans experience homelessness. Useful for screening, possible housing, service interventions, and for gaining an understanding of veterans' service needs.
- b. Veteran Status is not dependent on discharge status.
- c. If answered “yes” then additional questions relating to military service appear such as service year, participation in wars, and branch of military.

17) Animal Information

- a. Service Animal
 - i. Upload any Documentation for Client’s need of a service animal or an emotional support animal under the “Files” tab.
 - ii. Also Select “Pets” to identify what type of animal.
- b. Pets
 - i. List of all animals owned by the client
 - ii. Also asks if client is willing to consider rehoming the pet(s)?

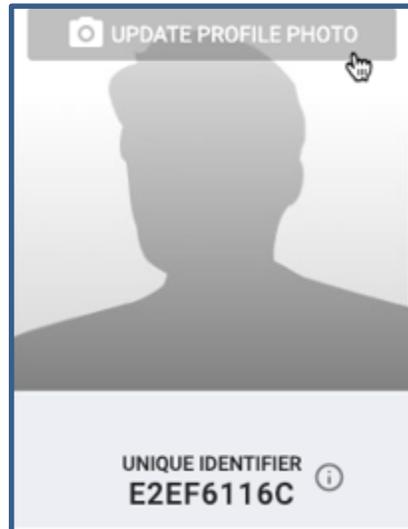
18) Select “SAVE CHANGES”

- a. If any required information is missing the Profile will not be saved and the problem causing the error is underlined in red.
- b. Correct all errors
- c. A green banner stating “Changes successfully saved” when all errors are successfully corrected.

Adding a Photo

To add a photo to the client record, hover over the default Client Profile image and click “UPDATE PROFILE PHOTO”.

- a) If you are taking a photo using a webcam, you may need to grant the site access to your camera in your browser.
- b) If you’re uploading a file, the acceptable file formats are .gif, .jpg, .jpeg, .png, and .tiff, and the maximum file size is 4 MB.



Creating an Anonymous Client Profile

NOTE: Some of our clients either do not want or cannot have identifying information in our HMIS. For instance, you may be working with clients whose safety may be jeopardized by adding their identifiable to HMIS. Alternatively, you may have clients who refuse to sign an HMIS ROI. In these situations, you can anonymize your clients, which will allow you to document your work in the system while maintaining their privacy and safety.

For more information, see the job aid [How to Anonymize a Client](#) for detailed instructions.