



ALAMEDA COUNTY

Monthly HMIS User Meeting
May 2025

Agenda

Icebreaker

Announcements

Abode Services Presentation

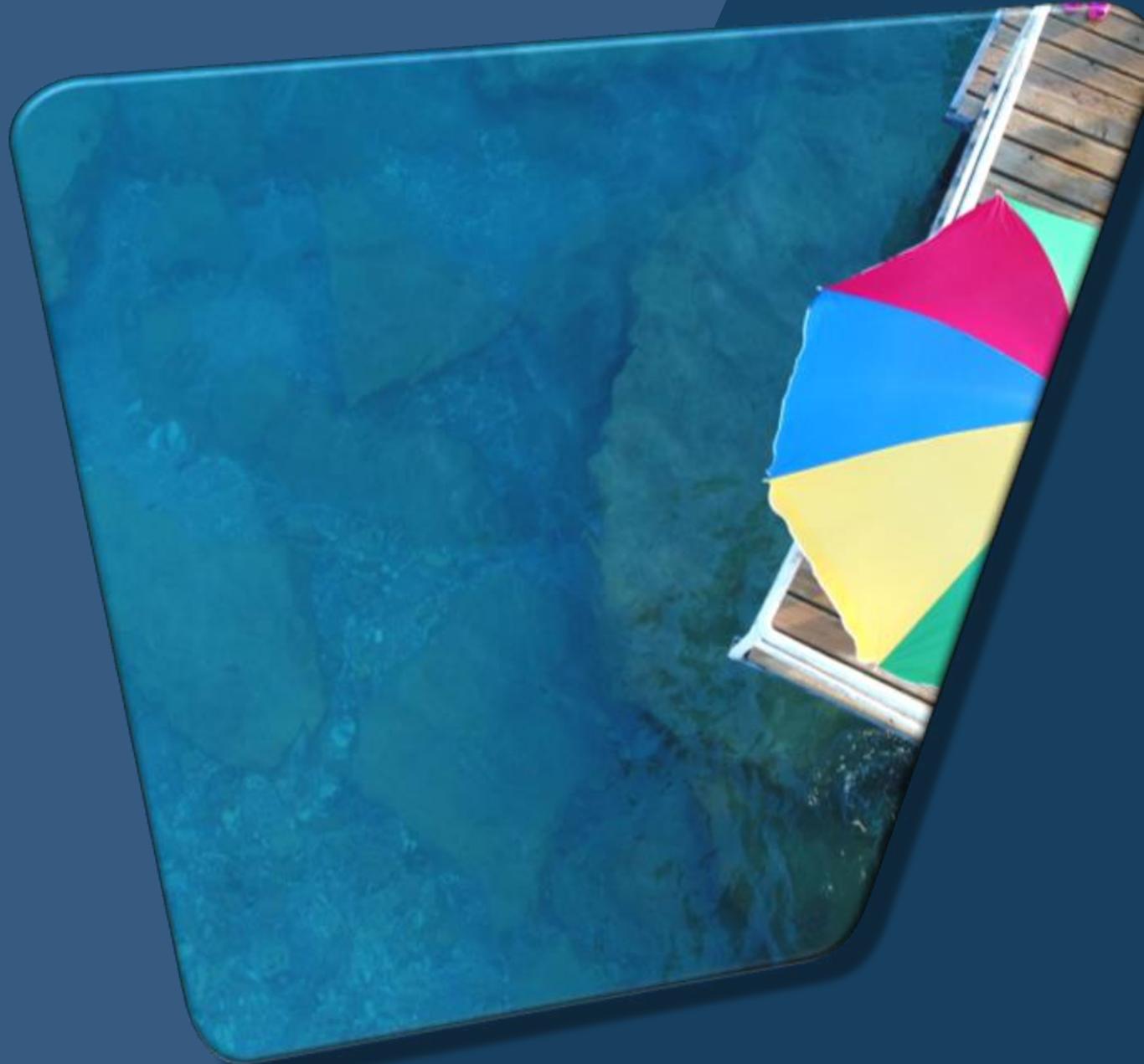
De-Identifying Clients

Client Notes vs Program Notes

Live Case Study

ICE BREAKER!

Please have your phones ready!





ANNOUNCEMENTS



ABODE

Ending Homelessness

DUPLICATE CLIENTS



Duplicate Clients

What Are Duplicate Clients?

- Duplicate clients occur when two or more records are created for one client.

Duplicate client records can have the same:

- Name
- DOB
- SSN

SEARCH FOR A CLIENT ADD CLIENT (+)

🔍 Jackie Rob SEARCH

	DOB	SSN	ROI
 Robinson Jackie (Skip, Jacks, JJ) Age: 44	02/02/1980	5432	<input checked="" type="checkbox"/> Yes
 Jackie Robinson (Skip, Jack, JJ)	02/02/1980	5432	<input checked="" type="checkbox"/> Yes

🔗 Help: How to search for a client

Before creating a new client record, search for **Full or Partial Name, Date of Birth, Full or Partial Social Security** Number, or a combination of the mentioned collected data.



Duplicate Clients

What to do if you find a Duplicate Client

All agencies and staff members using the HMIS system should search for the client's profile as part of the engagement process before creating a new record.



If an agency staff member discovers a duplicate client record, they should contact hmissupport@achmis.org



[DQXX-110] Duplicate Clients

---> Report Purpose & Summary

---> The Duplicate Clients report identifies client records that have matching Personal IDs.

---> For each client, the report lists the PII and DQ fields used for establishing Personal ID matching

---> Name

---> SSN

---> DOB

---> Gender

---> Race and Ethnicity

---> Veteran Status

Duplicated Client List							
Personal ID	Unique ID	Name	Name DQ	SSN	SSN DQ	DOB	DOB DQ
	12223444	Bitfocus, Test	Full name reported	***-**-000	Full SSN Reported	01/01/1980	Full DOB Reported
	12223444	Bitfocus, Test	Full name reported	***-**-001	Full SSN Reported	01/01/1980	Full DOB Reported
	12223444	Bitfocus, Test	Full name reported	***-**-003	Client doesn't know	05/29/1998	Full DOB Reported

Race and Ethnicity	Veteran Status	Added Date	Staff	Agency Name
Black, African American, or African	No	11/02/2017	Scott, Nate	**Alameda County CE Agency (Test)
Black, African American, or African	No	03/28/2018	Scott, Nate	**Alameda County CE Agency (Test)
White	No	09/11/2020	Crosby, Patrick	**Alameda County CE Agency (Test)





Client Notes VS Program Notes

Client Notes VS Program Notes

CLIENT NOTES

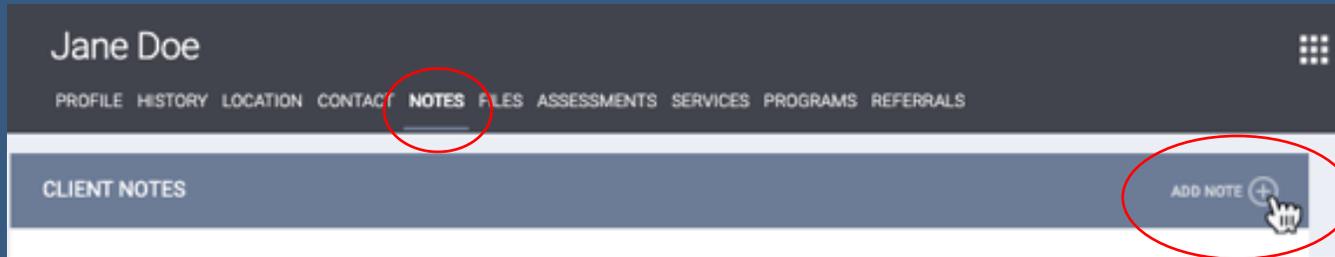
- > Client notes are **individual-level records** about a specific client's situation, needs, or interactions.
- > These notes are **tied directly to the person**, not just to their participation in a program.

PROGRAM NOTES

- > Program notes are **tied to a specific enrollment in a program**.
- > They are related to the client's **participation in that particular program** rather than their overall profile.

Client Notes

1



--->To create a note, click the **NOTES tab** within the client record and click **ADD NOTE**

2

--->The **CLIENT NOTES** page will appear.

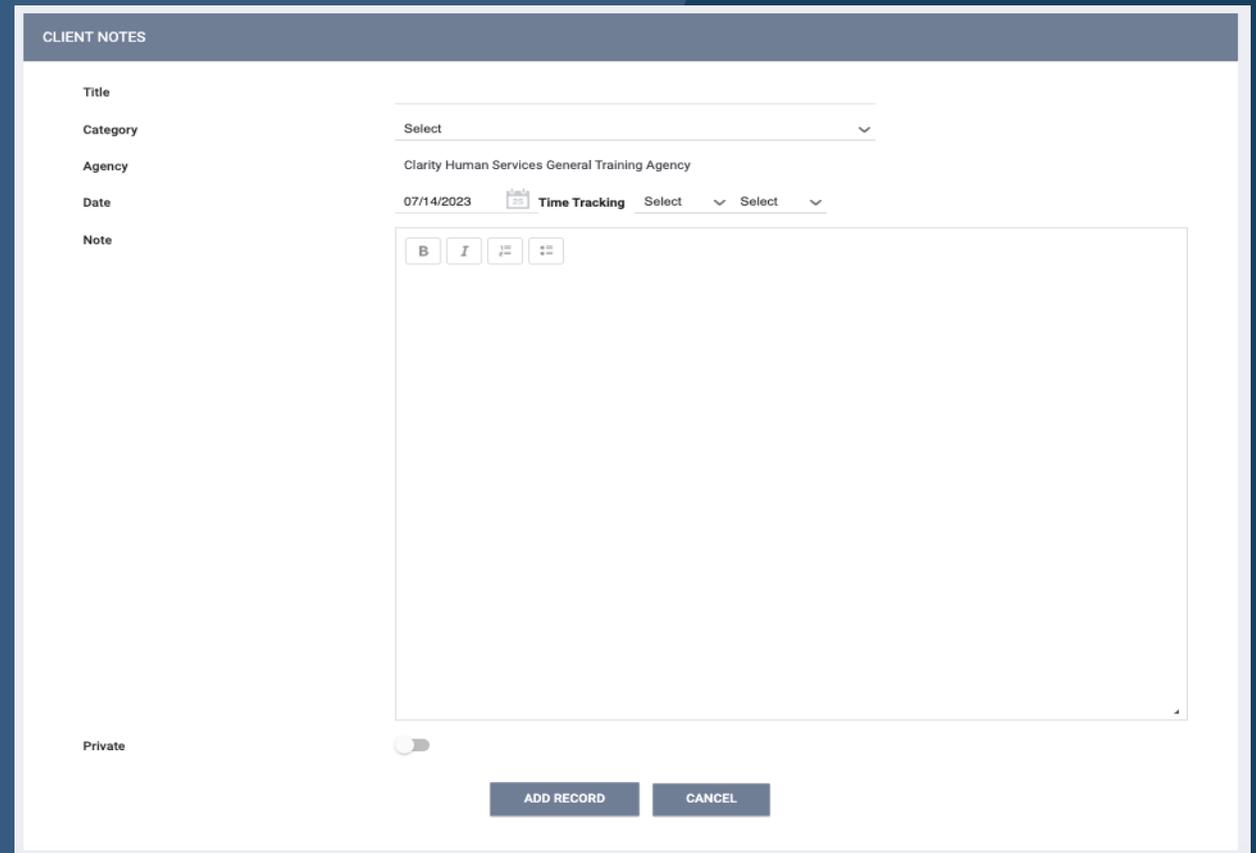
--->Enter the following

--->**Title**

--->**Date**

--->**Category**

--->**Desired text in the Notes field**



CLIENT NOTES

Title

Category Select

Agency Clarity Human Services General Training Agency

Date 07/14/2023 Time Tracking Select Select

Note

Private

ADD RECORD CANCEL

Program Notes

The screenshot shows a software interface with a top navigation bar containing tabs: PROFILE, HISTORY, LOCATION, CONTACT, NOTES, FILES, ASSESSMENTS, SERVICES, PROGRAMS, and HISTORY. The 'PROGRAMS' tab is circled in red. Below this is a header for 'PROGRAM: PROGRAM 2'. A secondary navigation bar contains tabs: Enrollment, History, Provide Services, Notes, Files, and Forms. The 'Notes' tab is circled in red. Below this is a section titled 'Client Program Notes' with an 'ADD NOTE' button featuring a hand cursor icon. A yellow callout box on the right contains red text explaining that notes can only be added if enabled and that they appear in both program and client-level notes tabs.

PLEASE NOTE: ONLY IF Program Notes are enabled, you can add notes in a client's program enrollment.

These notes appear in both the program and client-level NOTES tabs and can be edited from either location.

To add a new program note, open the program enrollment and click **NOTES** tab to **ADD NOTE**.

LIVE CASE STUDY



Case Study 1

The Doe family comprising Maria (35), her one child Daniel (10) became homeless after Ms. Doe lost her job due to a company downsizing. They were living in their car before contacting the local shelter.

Discussion: When Maria first arrives at the office, what are the initial steps you take?



1 Greet Maria

- Ensure she and her child are safe and calm

2 Take the time to listen

- Determine immediate needs (food, hygiene, emergency shelter)

3 Create a Client Profile in HMIS

- Explain confidentiality and the purpose of HMIS data collection

4 Program Enrollment

- Complete program enrollment in HMIS

**Pop Quiz: Does Maria
need a ROI?**



Case Study 2

→ Tanya has been enrolled in the Family Shelter Program for one month. During this time, Tanya has been attending job readiness classes.

Discussion: What steps should be taken during her stay to ensure ongoing support and accurate HMIS documentation?

1 Update HMIS Monthly

- Income changes (Tanya begins earning income)
- Services received
- Coordinate with RRH or other permanent housing options as the family approaches readiness for transition

How often should you complete an assessment?

Case Study 3

--->Skippy and his family has been enrolled in the transitional housing for 6 month. He secures a job and got selected for PSH.

Discussion: What are the required steps to properly exit the Adam and his family from the program in HMIS?

1 Exit Program

- Confirm move-out date
- Enter Exit Data in HMIS
 - Exit Date
 - Destination
 - Income at Exit
 - Benefits at Exit

What is considered a client exit date?

Questions?



Join us!

Alameda County Q&A Session

Every 2nd Tuesday of the month at 10:00 am

Register | [HERE](#)

Alameda County User and Liaisons Meeting

Every 4th Thursday of the month

Alameda Users 10a-11a

Agency Liaisons 11a-12p

Register | [HERE](#)



For support:

Alameda County HMIS Support Ticket:

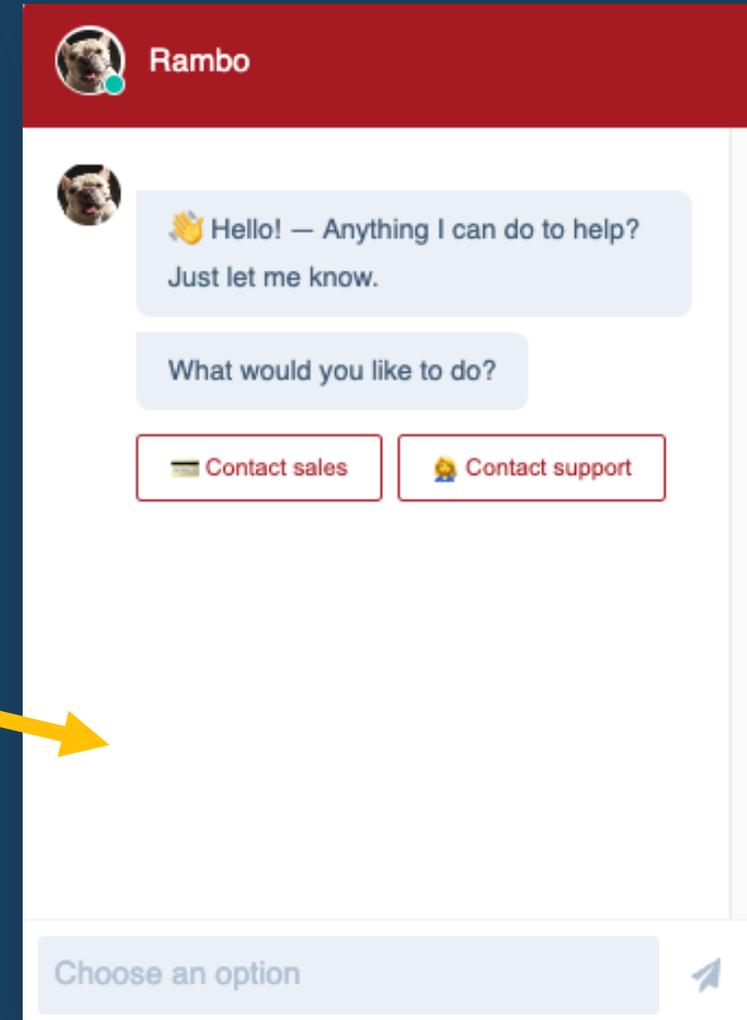
Email: hmissupport@achmis.org

Bitfocus Help Desk:

For support that includes:

- New User Requests (Including CE)
- Password Reset
- Login Issues
- Chat

Email: Alameda@bitfocus.com





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What Are Duplicate Clients?

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The screenshot shows a web application interface for searching clients. At the top, there is a header bar with the text "SEARCH FOR A CLIENT" on the left and "ADD CLIENT (+)" on the right. Below the header is a search input field containing the text "Jackie Rob" and a magnifying glass icon. To the right of the search field is a "SEARCH" button. Below the search field is a table with two rows of results. The first row shows a client record for "Robinson Jackie (Skip, Jacks, JJ)" with a DOB of "02/02/1980", Age of "44", SSN of "5432", and a "Yes" button in the ROI column. The second row shows a client record for "Jackie Robinson (Skip, Jack, JJ)" with the same DOB, Age, and SSN, and a "Yes" button in the ROI column. Below the table is a help link: "? Help: How to search for a client".

	DOB	Age	SSN	ROI
Robinson Jackie (Skip, Jacks, JJ)	02/02/1980	44	5432	Yes
Jackie Robinson (Skip, Jack, JJ)	02/02/1980	44	5432	Yes

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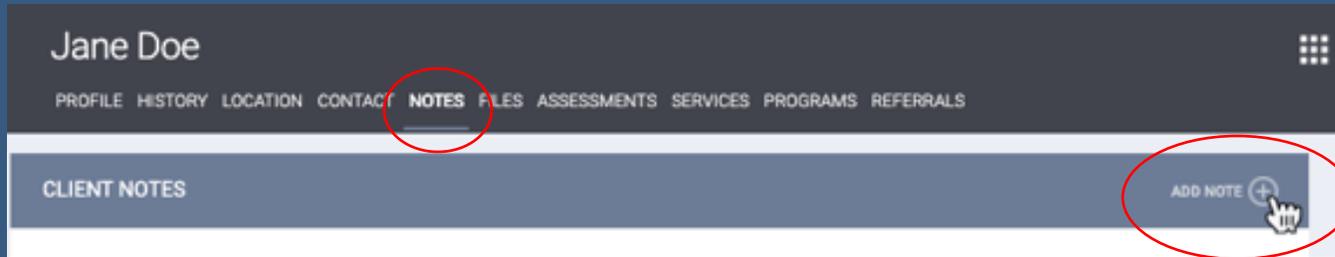
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--->**Desired text in the Notes field**

A screenshot of the 'CLIENT NOTES' form. The form includes fields for Title, Category (a dropdown menu), Agency (Clarity Human Services General Training Agency), Date (07/14/2023), and Note (a rich text editor with bold, italic, bulleted list, and numbered list icons). There is also a 'Time Tracking' section with a calendar icon and two dropdown menus. At the bottom, there is a 'Private' toggle switch and two buttons: 'ADD RECORD' and 'CANCEL'.

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