Emergency Shelter Data Entry Handbook
Wellsky Community Services HMIS
Multnomah County

This handbook provides instructions to check participants into and out of a shelter.

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Published 01/31/25, Updated 1/29/26

# Participant Search /Add Participant Process

If the participant record exists

Click **participants** from the left hand navigation pane on the Main Menu
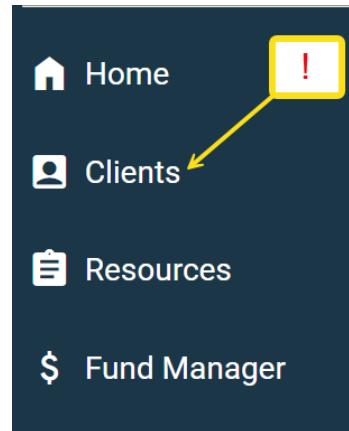
Participant Search displays
- Search participants by entering First Name and Last Name.

- Click **Search**

NOTE:
- Always check to see if a participant profile already exists before creating a new profile in HMIS. This step reduces the risk of creating duplicate profiles for the person.
- HMIS provides three ways to search, using first/last name, SSN, or participant ID. The preferred method is to use the name field.
- As a best practice, use the first three letters of their first name and first three letters of their last name to catch any spelling errors or differences in the name.
- If time permits, search for participants by entering different spellings of their name or nicknames.
- If the participant has multiple last names, search them under each of the last names provided. Search using an alias if applicable.
- In the event you find multiple participant IDs# for a participant, please email them to hmishelp@multco.us.

OR Search for Participant by **participant ID**
- Click **Submit**

Client Results displays the participants that match the search criteria.

	! ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
✏️	65	Scott, Jill	533-98-2222	10/22/1980		📄		1 🔍

Showing 1-1 of 1

To choose the participant click on either the participant name or pencil ✏️ to open the record.

If participant record does not exist

- If the search results in **No Matches** and a thorough search has been done, click **Add New participant With This Information**

Search	Clear	Add New Client With This Information
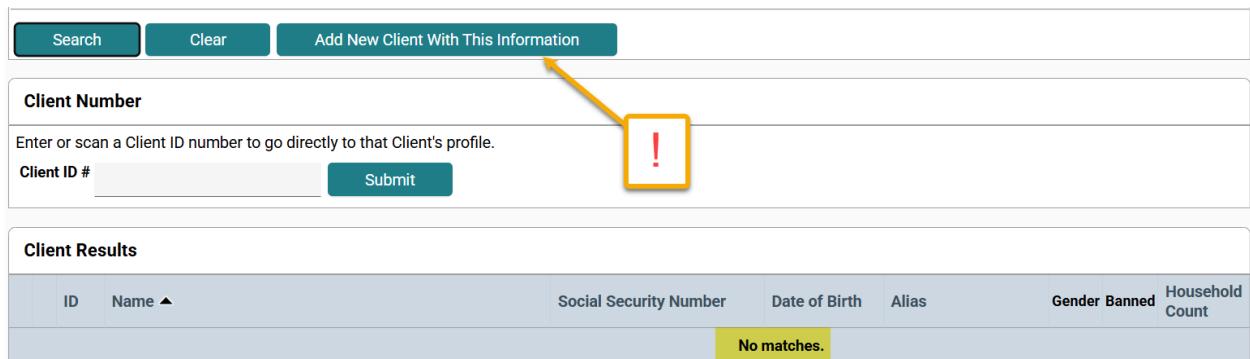
Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # [_____] [Submit]

Client Results

ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
			No matches.				

- Once you have added a new participant with this Information - a pop up will appear - just confirm and click **OK**

Add New Client Information ✕

You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process). Continue with Add New Client?

[Ok] [Cancel]
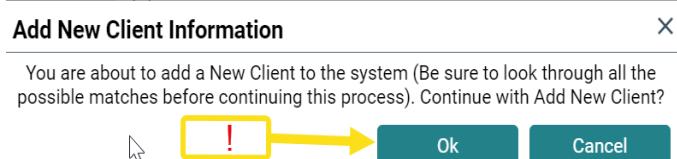
- A new participant record has been created. A new HMIS ID is assigned.
- There are two large tabs that

Clients > Client Profile

Type here for Global Search

Client - (708) Anderson, Gillian

(708) Anderson, Gillian
Release of Information: None

HMIS ID

Client Information | Service Transactions

Summary	Client Profile	Households	ROI	Entry / Exit

Added to the system 01/22/2025 02:37 PM

Name	Anderson, Gillian		Social Security
Date of Birth			
Race and Ethn			
Gender			

Client - (708) Anderson, Gillian

(708) Anderson, Gillian
Release of Information: None

Client Information | Service Transactions

Summary	Client Profile	Households	ROI

✏️ Client Record

make up the structure of the participant record. **participant Information** and **Service Transactions**

- In a new participant record click **participant Profile** to continue adding participant information.

- Click pencil ✏️ to edit the record
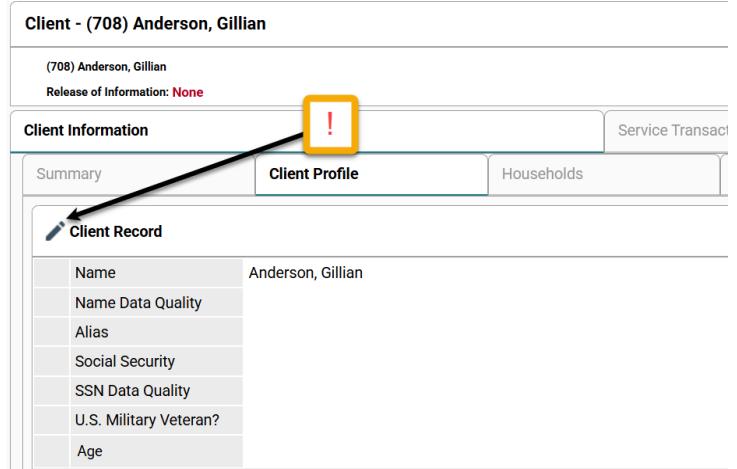
Note:
- **participant Profile** is the only area of the record where these specific data elements can be updated or corrected.

- There are also **Data Quality** questions that are required to be filled out.

- Ensure all data elements have been added - First/Last Name, SSN, SSN Data Quality and Veteran Status
- Choices for **Data Quality** are shown to the right. These answers are helpful to ensure data elements are captured completely and correctly.

*Note - Asking for SSN is only required for certain funding sources. However, if participants are comfortable providing the last four digits that is acceptable. Data quality response would be Approximate or Partial SSN reported.

- If a participant does not have a SSN Data Quality responses could be participant doesn't know or participant prefers not to answer.

- Ensure all Data Quality questions are answered.

- Click **Save**.

Household Information

Note:
- A **Household** only needs to be created in the event there are 2 or more individuals in the household being served.

- Click **Households** under the **participant Information** tab.
- Click **Start New Household**

Client Information				Service Transactions		
Summary	Client Profile	**Households**	ROI	Entry / Exit	Case Managers	Assessments

ⓘ This Client is not currently a member of any Households.

!

▶ Previous Households

Search Existing Households	Start New Household		Exit

● Enter the appropriate Household Type

Add New Household

Household Type

Household Type *	-Select- ▾

Client Search

-Select-
Single Individual
Female Single Parent
Male Single Parent
Two Parent Family
Grandparent(s) and Child
Foster Parent(s)
Couple With No Children
Non-custodial Caregiver(s)
Family Unit (HOPWA)
Shared Housing (HOPWA)
Living with a live-in aide (HOPWA)
Other

Name	Fir...
Name Data Quality	
Alias	
Social Security Number	
Social Security Number Data Quality	
U.S. Military Veteran?	
Exact Match	☐

Add New Household ✕

Household Type

Household Type *	Female Single Parent ▾

Client Search

ⓘ Please Search the System before adding a New Client.   **Hide Advanced Search**

	First	Middle	Last	Suffix
Name	Sophia		Thompson	
Name Data Quality	-Select- ▾			
Alias				
Social Security Number	__ - __ - ____			
Social Security Number Data Quality	-Select- ▾			
U.S. Military Veteran?	-Select- ▾			
Exact Match	☐			

Search	Clear	Add New Client With This Information

Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID # [   ] Submit

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
82	Thompson, Kendra		08/30/1983			📄	0 🔍

Showing 1-1 of 1

● As we continue building the household, enter data for the next household member.

● Click Search to ensure this person is not already in the system and then **Add New participant with The Information.**

- Once you have attached additional household members, Click Continue.

	ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	708	Anderson, Gillian						0 🔍
⊖	712	Mulder, William						0 🔍

Showing 1-2 of 2

Continue   Cancel

- One person must be designated as Head of Household.

- Click on **Head of Household** and click "Yes." Notice the Relationship to Head of Household automatically changes to "Self"

Household Information - (427) Female Single Parent

🗑 (427) Female Single Parent   Save   Save & Exit   Exit

Household Type *	Female Single Parent ⌄
Income	US$0.00 monthly (US$0.00 annual) 🔍
Client Count	2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
⊖ (708) Anderson, Gillian		Yes ⌄	Self ⌄	01 / 22 / 2025 📅📅 0 🔍		1 🔍
⊖ (712) Mulder, William		No ⌄	-Select- ⌄	01 / 22 / 2025 📅📅 0 🔍		1 🔍

Add/Delete Household Members   Household History Report

- For the second household member, click on Household to Relationship and choose the best answer to describe the relationship to the Head of Household.

- If creating a household for a new participant - the **Joined Household** date needs to be aligned with the date of the intake. The date will default to the day you are entering the data.

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
⊖ (708) Anderson, Gillian		Yes ⌄	Self ⌄	01 / 22 / 2025 📅📅 0 🔍		1 🔍
⊖ (712) Mulder, William		No ⌄	Son ⌄	01 / 22 / 2025 📅📅 0 🔍		1 🔍

Add/Delete Household Members   Household History Report

Multiple Member Households

- From Households tab, click **Manage Household**

- Click **Add/Delete Household Members**

- Click **arrow** to open page to add household members

- Enter search criteria First and/or Last Name, SSN

- Click **Search**

- Click on the plus sign to add the household member name if one displays

	ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
⊕	8	Mulder, Fox	329-80-2343	10/13/1961		📄		2 🔍

Client Results

Showing 1-1 of 1

- If no records returned, click **Add New participant With This Information**

(cont. on next page)

Release of Information

Note:

- Work with your supervisor for information about how to ask participants for consent around data sharing.

Client - (490) Mira, Walter, Sr

🗑 (490) Mira, Walter, Sr

Release of Information: **None**

Client Information

- Click the **ROI** tab from main menu bar

Summary	Client Profile	Households	**ROI**

- Click **Add Release of Information**

Release of Information

Provider	!

Add Release of Information

- The current participant's name should already be greyed out.

Release of Information - (490) Mira, Walter, Sr

Household Members

ⓘ To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.

☐ (260 ! rent Family

☑ (490) Mira, Walter, Sr

- If all members in the household consent to share their data - Click the box next to the household "bucket" where it describes the household type.
- Parents consent for their children.

Release of Information ✕

Release of Information - (708) Anderson, Gillian

Household Members !

ⓘ To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.

☑ (427) Two Parent Family

☑ (708) Anderson, Gillian

☑ (8) Mulder, Fox

☑ (712) Mulder, William

NOTE:

- Only one ROI per household is needed
- ROI is attached to head of household
- All adult members need to consent to share their data.

Release of Information Data

Provider* – This will default to your login in provider.

Note - in order for the data to flow properly and to allow for other agencies to see the data - you must select 2 providers:
  1) Where you log in
  2) Project/program where you are entering the data.

Release Granted: Yes or No
  ● Choose value to indicate if a household member provided you their consent to share information.

  ● **Start Date** defaults to {today date} needs to line up with intake date or entry into program.

  ● Enter **End Date** = 7 years from the Start Date

  ● **Documentation -** choose from values list which documentation method was used to gather ROI consent (or no consent)

  ● **Witness** - enter person's name who witnessed the participant provide their ROI information

  ● Click **Save Release of Information**

  ● Click **Exit**

Now move to the Shelter Module from the left side Navigation Pane

Shelter Inventory Information

The following steps are applicable to shelters that use the check-in/check-in process through the Shelters portal. Addendum 2 describes the check-in/check-out process for shelters that utilize the entry/exit tab for this purpose. **Emergency Motel Voucher programs utilize the entry/exit tab for tracking shelter stays.**

- Navigate to the **Main Menu** section on the left hand side.

- Click **Shelters**
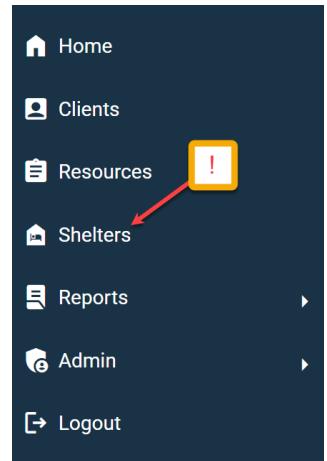
- **Provider** value defaults to your login provider

- Click **Search** to choose the correct shelter program the household is being enrolled in.

- Click on the + sign to choose the program and open the Shelters Dashboard

- Click **View All** to display the Shelter roster.

Checking Participants into Shelter Beds

The following steps are applicable to shelters that use the check-in/check-in process through the Shelters portal. Addendum 2 describes the shelter entry/exit process for shelters that utilize the entry/exit tab for this purpose. **Emergency Motel Voucher programs utilize the entry/exit tab for check-in/check-outs.**

- Click **green plus** sign next to the row of the room/bed where participant column = Empty

- Search for the participant by name or **participant ID**

- Click **Search**

- **Date In** defaults to {today date}.

- Ensure the date reflects the intake date when the participant actually checks into the bed.

- If a participant moves rooms/beds click **Assign Unit** to reassign.

- Scroll down to check household configuration and if ROIs are present.

- Review **Household Members** to enroll other household members as appropriate. Assign them a bed.

- **Release of Information** is present as this was done prior to enrolling the household into the shelter module.

Household Sharing	
	Add Household Data

▾ Household Members

To include Household members in this Check In, click the box beside each name. Then assign each member a unit. If no unit is available, an Overflow unit will be used. Note: Only members from the same Household may be selected.

(427) Two Parent Family

☐ (708) Anderson, Gillian   Assign Unit

☐ (8) Mulder, Fox   Assign Unit

☐ (712) Mulder, William   Assign Unit

Release of Information

Release of Information   Ends 01/23/2032   View ROI Details

Entry Data

| Provider * | Our Just Future: Lilac Meadows Shelter-SP (3066) | Search | My Provider | Clear |
| Type * | Basic ▾ | | | |

Program Entry

A note on overlapping entries: Data rules prohibit someone from occupying two or more beds at the same time. This means that someone needs to be exited from one residential program before entering another one. See Addendum 1 for more information..

- **Enter Relationship to Head of Household**

- Choose **Enrollment CoC** from values list - this is indicating what area you are enrolling the participant. Select OR-501 if the participant is sleeping in a bed located within Multnomah County.

- **DOB** defaults from participant Profile

- **Date of Birth Type** defaults from participant Profile

- Choose appropriate **Gender** identity and **race/ethnicity** identity. To select multiple values hold down the "ctrl" or "cmd" key and click on each value.

Program Entry - ES, SO [OR-501]

Complete the following questions for EACH Household Member

| Relationship to Head of Household | * | Self (head of household) |

Hint: Enrollment CoC = OR-501 Portland/Gresham/Multnomah County

| Enrollment CoC | -Select- ▾ G |

-Select-
OR-501 Portland/Gresham/Multnomah County
OR-504 Salem/Marion, Polk Counties CoC
OR-505 Oregon Balance of State CoC (ROCC)
OR-506 Hillsboro/Beaverton/Washington County CoC
OR-507 Clackamas County CoC
WA-508 Vancouver/Clark County CoC
N/A: NON-CoC Project
Non OR501: Not a CoC Project
Non OR506: Not a CoC Project
Non OR507: Not a CoC Project
Portland Housing Bureau/City of Portland

Date of Birth

Date of Birth Type

To select multiple values hold down...

Gender

To select multiple values hold down the "ctrl" or "cmd" key and click on each value

Gender	
	Woman (Girl, if child)
	Man (Boy, if child)
	Culturally Specific Identity (e.g., Two-Spirit)
	Transgender
	Non-Binary
	Questioning
	Different Identity
	Client doesn't know
	Client prefers not to answer
	Data not collected

Clear All

If Different Identity, Please Specify

Text field below is required when selecting "Different Identity"

RACE and HISPANIC/LATINO ETHNICITY

Race and Ethnicity	
	American Indian, Alaska Native, or Indigenous
	Asian or Asian American
	Black, African American, or African
	Hispanic/Latina/e/o
	Middle Eastern or North African
	Native Hawaiian or Pacific Islander
	White
	Client doesn't know
	Client prefers not to answer
	Data not collected

- Answer if Translation Assistance is Needed and if 'yes', identify which language is needed.

- Select Primary language

Translation Assistance Needed	Yes (HUD) ⌄ G
Preferred Language	-Select- ⌄ !
Required response when selecting Different Preferred Language	
If Different Preferred Language, please specify	G
Primary Language	-Select- ⌄ G
If Primary Language is Other, then Specify:	G

Disabilities Section

2 Does the participant have a self reported disabling condition? Click 'Yes' or 'No'
  - Click 'participant doesn't know', 'participant prefers not to answer', or 'data not collected' as appropriate.

2 The red triangle is signaling that the second step is required. Click on the HUD Verification - to bring up the menu of disabling conditions to choose from.

- Disability Type - For each condition that is chosen a pop up window appears.

- Start Date* - This date should reflect the date of intake or enrollment into the program.

- Note on Disability - enter notes if applicable

- Click **Save**

- **Exit** when complete

Red ⚠️ means 'stop' and 'green' ✅ means proceed.

Editing Disabilities

NOTE:

- A participant may have reported a disabling condition when served by another provider in the past. Today during intake, the participants reported not having that condition or maybe it is no longer applicable.

- Click the pencil ✏️ next to the disability that needs to be updated.

- End date the information that had been entered previously.

Health Insurance

1   Is the participant Covered by Health Insurance? Click 'Yes' or 'No'
    a) Click 'participant doesn't know', 'participant prefers not to answer', or 'data not collected' as appropriate.

2   The red triangle is signaling that the second step is required. Click on the HUD Verification - to bring up the menu of health insurance to choose from.

HUD Verification: Health Insurance for 01/28/2025

ⓘ Per Health Insurance Type, the current records for Health Insurance as of 01/28/2025 are displayed below. Any previous records for Health Insurance not overlapping as of this date are not displayed. In the event that multiple records exist per Health Insurance Type as of 01/28/2025, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Covered? value for all incomplete Health Insurance Type records	○ Yes ◉ No ○ Data Not Collected ○ Incomplete

3   A timesaving step - click 'No' for them all and then click the one type that applies as a 'Yes' and then click Save & Exit.

Health Insurance Type	Covered?			
	Yes	No	Data Not Collected	Incomplete
MEDICAID	◉	○	○	○
MEDICARE	○	◉	○	○
State Children's Health Insurance Program	○	◉	○	○
Veteran's Health Administration (VHA)	○	◉	○	○
Employer - Provided Health Insurance	○	◉	○	○
Health Insurance obtained through COBRA	○	◉	○	○
Private Pay Health Insurance	○	◉	○	○
State Health Insurance for Adults	○	◉	○	○
Indian Health Services Program	○	◉	○	○
Other	○	◉	○	○

Red means 'stop' and 'green' ✔ *means proceed*

[Save] [Save & Exit] [Exit]

SHS Priority Population

Complete the following questions for Head of Household and All Adults

Complete SHS Priority Pop for HOH if funded by JOHS

Identify the SHS Priority Population	-Select- ∨ G	!

-Select-
Population A
Population B

Income from Any Source   ∨ G
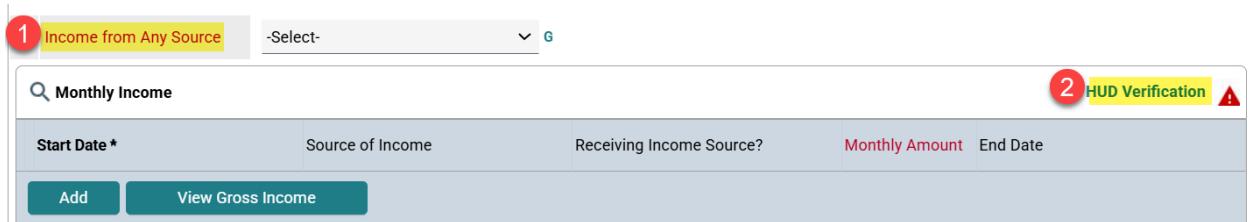
- SHS stands for "Supportive Housing Services". Use this question to indicate whether heads of household belong to SHS population A or B. This question is required for programs receiving *any* HSD funding.

- Complete this question for all Heads of Households only.

- **Definition:** Population A includes participants who self-report a disabling condition, are below 30% AMI, and are experiencing long-term homelessness or at imminent risk. *Use the Experiencing or At Imminent Risk of Homelessness* form to determine SHS population status.

    Population B includes anyone who is not in Population A.

Income from any Source

1. Does the participant receive Income from Any Source? Click 'Yes' or 'No'
   a. Click 'participant doesn't know', 'participant prefers not to answer', or 'data not collected' as appropriate.

2. The red triangle indicates that the second step is required. Click on the HUD Verification - to bring up the menu of different sources of income to choose from.

Non-Cash Benefits

1. Does the participant have any Non-cash benefit from any source? Click 'Yes' or 'No'
   a. Click 'participant doesn't know', 'participant prefers not to answer', or 'data not collected' as appropriate.

2. The red triangle is signaling that the second step is required. Click on the HUD Verification - to bring up the menu of different sources of Non-cash Benefits to choose from.

3. Time-saving step - click 'No' for all of them but then click 'Yes' if the participant receives food stamps. Click 'Save' and the editing pencil ✎ appears.

   Click the pencil ✎ next to food stamps to enter the amount received.

HUD Verification: Non-Cash Benefits for 01/28/2025

ⓘ Per Source of Non-Cash Benefit, the current records for Non-Cash Benefits as of 01/28/2025 are displayed below. Any previous records for Non-Cash Benefits not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Non-Cash Benefit as of 01/28/2025, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Source of Non-Cash Benefit	Receiving Benefit?			
	Yes	No	Data Not Collected	Incomplete
✎ Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	◉	○	○	○
✎ Special Supplemental Nutrition Program for WIC (HUD)	○	◉	○	○
✎ TANF Child Care Services (HUD)	○	◉	○	○
✎ TANF Transportation Services (HUD)	○	◉	○	○
✎ Other TANF-Funded Services (HUD)	○	◉	○	○
✎ Other Source (HUD)	○	◉	○	○

Save   Save & Exit   Exit

4. Then click Save & Exit.

(cont. on next page)

Prior Living Situation

- Select the 'Type of Residence' from the *Living Situation Option List* that most closely matches where the participant was living prior to the project start, i.e. last night.

- Adult members of the same household may have different prior living situations.

-Select-
—— HOMELESS SITUATIONS ——
Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside) (HUD)
Emergency shelter, including hotel or motel paid for with emergency shelter voucher, Host Home shelter (HUD)
Safe Haven (HUD)
—— INSTITUTIONAL SITUATIONS ——
Foster care home or foster care group home (HUD)
Hospital or other residential non-psychiatric medical facility (HUD)
Jail, prison, or juvenile detention facility (HUD)
Long-term care facility or nursing home (HUD)
Psychiatric hospital or other psychiatric facility (HUD)
Substance abuse treatment facility or detox center (HUD)
—— TEMPORARY HOUSING SITUATIONS ——
Transitional housing for homeless persons (including homeless youth) (HUD)
Residential project or halfway house with no homeless criteria (HUD)
Hotel or motel paid for without emergency shelter voucher (HUD)
Host Home (non-crisis) (HUD)
Staying or living in a friend's room, apartment, or house (HUD)
Staying or living in a family member's room, apartment, or house (HUD)
—— PERMANENT HOUSING SITUATIONS ——
Rental by client, no ongoing housing subsidy (HUD)
Rental by client, with ongoing housing subsidy (HUD)
Owned by client, with ongoing housing subsidy (HUD)
Owned by client, no ongoing housing subsidy (HUD)
—— OTHER ——
Client doesn't know (HUD)
Client prefers not to answer (HUD)
Data not collected (HUD)

- Length of Stay in Previous Place

- The next set of questions are to identify if the participant meets the definition of chronically homeless.

-Select-
One night or less
Two to six nights
One week or more, but less than one month
One month or more, but less than 90 days
90 days or more, but less than one year
One year or longer
Client doesn't know
Client prefers not to answer
Data not collected

Approximate date this episode of homelessness started	___/___/_____ 📅 ↺ 📅 G
Regardless of where they stayed last night - Number of times the client has been on the streets, in ES, or SH in the past three years including today	-Select- ⌄ G
Total number of months homeless on the street, in ES or SH in the past three years	-Select- ⌄ G

Survivor of Domestic Violence

- Click the appropriate response if the participant is a survivor of Domestic Violence?

- If yes, click when the last experience occurred

- If yes, for survivor of domestic violence, are you currently fleeing?

You are done! Now just press Save & Exit!

Participant Check Out from the Shelter

The following steps are applicable to shelters that use the check-in/check-in process through the Shelters portal. Addendum 2 describes the check-in/check-out process for shelters that utilize the entry/exit tab for this purpose. **Emergency Motel Voucher programs utilize the entry/exit tab for shelter stays.**

- Check participant out by clicking 'View All' on the Shelters Dashboard

- Click **red minus sign** next to participant who is leaving the shelter bed

- Date Out* defaults to {today date}
  - ☐ Change date if applicable

- Choose **Reason for Leaving** from values list

- Choose **Destination** from values list

Unit Exit Data - (1) Cabrera, Ana

Date Out *	01 / 31 / 2025 📅 🔁 📅 7 ∨ : 54 ∨ : 43 ∨ AM ∨
Unit Name / Number	02-002
Supplies Returned	◉ Yes ○ No
Reason For Leaving *	Unknown/Disappeared ∨
Destination *	Client doesn't know (HUD)

- Update the record if there has been any changes *at exit* for **disabilities, covered by health insurance, monthly income and non-cash benefits.**

- Scroll to end of page and choose **Save and Exit**

When exiting households who have *more than one individual*

- Click the "household bucket" to ensure both individuals are checked

- Click **Save & Exit**

Unit Exit Data - (2) Diaz, Jose

Date Out *	01 / 31 / 2025 📅 🔁 📅 8 ∨ : 03 ∨ : 52 ∨ AM ∨
Unit Name / Number	01-002
Supplies Returned	◉ Yes ○ No
Reason For Leaving *	Unknown/Disappeared ∨
Destination *	No exit interview completed (HUD) ∨

Household Members

ℹ To update Household members' Check Out data, click on the box beside each name. Note: Household Members who were previously checked out are disabled and appear for informational purposes only.

☐ (1) Couple With No Children [!]
  ☐ (2) Diaz, Jose (Date In: 01/31/2025 8:03:22 AM) (Primary Client)
  ☐ (3) Diaz, Kristi (Date In: 01/31/2025 8:03:22 AM)

You are done!

For **Night by Night shelters** to check out multiple participants with the same exit date using 'Transmit Today's Check Out List'

- Click the **Check Out** box for all participants leaving the shelter on the same day

- Date Out defaults to {today date}.
  - ○ Change if not {today}

- Leave the default values for **Exit Destination** and **Reason for Leaving**

- Click **Check Out**

Shelters Dashboard

Check Client In	Check In Reservation	Check In Referral
Update Confirmation List	[!] Transmit Today's Check Out List	View All
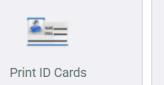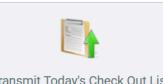
Check Out List

Current Check Out Date 01 / 31 / 2025 📅 🔁 📅 8 ∨ : 11 ∨ : 51 ∨ AM ∨   [Set Dates]

Check Out	Client ID	Client Name	Group ID	Unit Date Out / Reason For Leaving / Destination	Supplies Returned
☑	2	Diaz, Jose	03-001	01 / 31 / 2025 8 ∨ : 11 ∨ : 51 ∨ AM ∨ Unknown/Disappeared ∨ Client doesn't know (HUD) ∨	☐
☑	3	Diaz, Kristi	03-002	01 / 31 / 2025 8 ∨ : 11 ∨ : 51 ∨ AM ∨ Unknown/Disappeared ∨ Client doesn't know (HUD) ∨	☐
☑	1	Cabrera, Ana	02-002	01 / 31 / 2025 8 ∨ : 11 ∨ : 51 ∨ AM ∨ Unknown/Disappeared ∨ Client doesn't know (HUD) ∨	☐

[Check All] [Uncheck All]

Addendum 1: Overlapping Entries within Emergency Shelter

Participants have "overlapping entries" when they have multiple entries open at the same time for more than one night. Overlaps often happen in shelters because beds are held for multiple nights after someone's departure from an earlier shelter stay. While overlaps are allowable from a programmatic perspective, they are not allowable in the data. Overlaps need to be resolved or avoided for all shelter types. Or, you may see someone enrolled in a shelter while also being housed in a permanent housing project (e.g. PSH or RRH). The rules for fixing an overlap depend on the types of projects involved.

For shelter: A participant cannot have more than one shelter entry open at the same time for more than one night. The Entry Date for the new shelter stay must be on or after the Exit Date of the previous shelter stay. Covid-related shelters are a local exception to this rule. If the participant moves out of the shelter into permanent housing, the exit date of the shelter stay must be on or before the Housing Move-In Date for the permanent housing entry.

The following situations will produce an "overlapping entry" error:

Situation	How to fix
Participant enrolled at two shelters at the same time	1) Adjust exit date of earlier shelter stay to be on or before the entry date of the later shelter stay, or 2) delete one shelter stay if its entry and exit dates fall *within* the dates of the other shelter stay.
Participant enrolled in ES while housed in PSH at the same time	Adjust exit date of shelter stay to be on or before the HMID of the PSH entry
Participant enrolled in ES while housed in RRH at the same time	Adjust exit date of shelter stay to be on or before the HMID of the RRH entry

The following situations will not produce an "overlapping entry" error:

Situation	Why it's okay
Participant enrolled in ES and RRH at the same time	Participants are able to utilize RRH case management to assist in housing barrier busting and housing search, while actively enrolled at an ES. The participant must be exited from the ES entry on or before the HMID for the RRH entry.

Addendum 2: Emergency Motel Vouchers: Data Entry Process using Entry/Exits

Emergency Motel Voucher (EMV) programs do *not* utilize the "Shelters" module because they operate on a scattered site basis. Instead, complete the shelter entry and exit process using the Entry/Exit feature within a participant's profile (i.e. the "Clients" module).

Shelter Entry Process using Entry/Exits
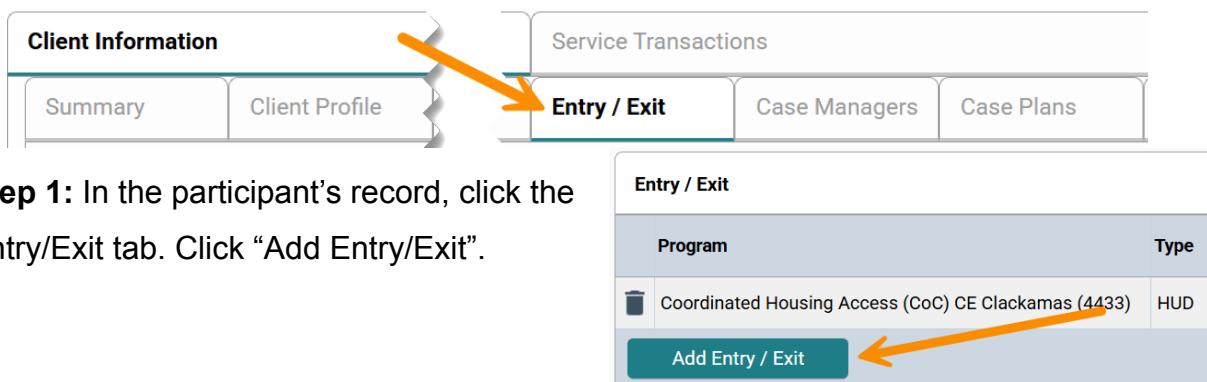
Step 1: In the participant's record, click the Entry/Exit tab. Click "Add Entry/Exit".

Step 2: Select the correct Emergency Shelter provider, by clicking Search in the provider field and clicking the grey "+" next to the correct provider.

Step 3: Select the "Basic" E/E type and select the correct Project Start Date.

Step 4: Click "Save & Continue."

Step 5: Enter all entry assessment data. All of these questions should be located on your emergency shelter intake paperwork. Individual fields in the assessment are described in detail in earlier sections of this document.

Shelter Exit Process using Entry/Exits

Step 1: In the participant's record, click the Entry/Exit tab. Find the Emergency Shelter provider entry/exit.

Step 2: Click the pencil next to the "Exit Date" field.

Step 3: Enter the Exit Destination and Project Exit Date. Click "Save & Continue".

Step 4: Make any needed updates to the participant's exit assessment. Once all updates are complete, scroll to the bottom and click "Save & Exit".

Revision History

- **1/23/2026** Add addendum 2, "Emergency Motel Vouchers: Data Entry Process using Entry/Exits".
- **1/9/2026** Additional detail and definition added to 'SHS Priority Population' subsection.
- **1/6/2026** Added addendum 1, "Overlapping Entries within Emergency Shelter".