



Coordinated Housing Assessment Team (CHAT) Data Entry Handbook

Updated: 09/15/2026

This handbook provides instructions to enrollment and exit participants into and out of a CHAT program. Please contact us at hmishelp@multco.us for questions.

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1. Participant Search /Add Participant Process

- Click **Clients** from the left hand navigation panel from the homepage.
- Search participants by entering the first three letters of their first name and first three letters of their 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.
- 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.

a. If the participant record exists

- **Client Results** displays the participants that match the search criteria.
- Click either the participant name or pencil to open the record.

	ID	Personal ID	Name ▲
	93	554bc3afb33ea2fefff1acde0bd7f33a	Doe, John

b. If the participant record does not exist

- If Client Results yields **No Matches**, continue with the Data Quality fields, then click **Add New participant With This Information**.

Note: Participants have the right to not provide SSN for the vast majority of programs. Participants may provide the last four digits of their SSN, if they are comfortable doing so. For SSN Data Quality, select “Approximate or partial SSN reported”.

- A pop up will appear - just confirm and click **OK**.
- A new participant record has been created. A new **client ID** is assigned.

Note: If you need to correct some data fields for example, incorrect spelling of last name, first name change, or veteran status adjustment, click **Client Profile** to do so.



Continue with the data entry process in the following five important tabs to complete the entire **CHAT** workflow.

- Households
- ROI
- Entry/Exit
- Case Managers
- Assessments

2. Household tab

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

- Click **Households** from the main menu bar.
- Click **Start New Household**.
- Enter the appropriate **Household Type**.
- Search the household member by entering the first three letters of their first name and last name like in step 1.
- Answer all the Data Quality questions.
- Click **Add New participant with The Information**.
- Once you have attached additional household members, Click Continue.
- Click **Head of Household** and select “Yes” to assign the Head of Household, the Relationship to Head of Household automatically changes to “Self” and the rest to “No.”
- For the second household member, click on Household to Relationship and choose the best answer to describe the relationship to the Head of Household.
- Enter the intake date in the Joined Household date.

Household Type

Household Type * Couple With No Children

Client Search

Please Search the System before adding

Name: First Jane Middle Last Doe

Name Data Quality: Full Name Reported

Alias:

Social Security Number: - -

Social Security Number Data Quality: Client prefers not to answer (HUD)

U.S. Military Veteran?: No (HUD)

Sex: -Select-

Exact Match: ☐

Search Clear Add New Client With This Information

Household Members								
Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count		
(174) Doe, Jane		No	Wife	08 / 01 / 2026	0	1		
(171) Doe, John		Yes	Self	08 / 01 / 2026	0	1		

Add/Delete Household Members Household History Report

► Previous Household Members

Only one Head of Household per HH

Backdate to reflect the intake date

3. Release of Information tab (ROI)

All members of the household enrolled in the CHAT program must complete an ROI. If all participants give the same consent to sharing, then follow the steps below. Otherwise, you must transact their ROIs separately.

In this demonstration, we will enroll this household into the CHAT (6082) from EI Programa.

- Click **ROI** from the main menu bar.
- Click **Add Release of Information**
- Check the box next to the household type to select the entire household.
- Click **Search**.

Household Members

To include this Release of Information, click the checkbox next to the household type. Only one household type may be selected.

☐ (122) Couple with no children

☒ (171) Doe, John

☐ (174) Doe, Jane

Release of Information Data

Provider * El Programa Hispano Catolico (EPHC) - Agency (2353) **Search**

In order for other agencies to see the CHAT assessment - you must select 2 providers:

- 1) Login or agency, this is chosen by default, in this example, EI Programa.
- 2) Project or program, where you enroll clients in, in this example, CHAT In Reach program 6082. Each provider/program in HMIS is assigned a 4 digit number.

A Provider Search pop-up appears.

- Enter "CHAT" in the **Search** box or the provider ID 6082 in the **Provider ID** box to look up the program.
- Click the **plus sign** to the left of the CHAT to select it.
- Click **Exit** to close the Provider Search box.

Provider Search

Search for Providers by using keywords from the Provider Name or Description.

Search CHAT **Show Advanced Options**

Search

Provider Number

Enter or scan a Provider ID number to search for that Provider.

Provider ID # **Submit**

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Provider													Level	Phone			
El Programa Hispano Catolico (EPHC) - Coordinated Housing Access Team (CHAT) (6082)													Level 6	Unknown			

- **Release Granted:** Select

Yes or No based on whether clients agree to share data or not.

- **Start date:** the ROI start date *must* equal the program start date *even if consent was collected on a different day*.

- **End date:** 7 years after the start date.

- **Documentation:** Select Verbal Consent.

- **Witness:** Enter the name of the person identified in the Witness field of the Verbal ROI form.

- **Client Signature:** Skip this.

- **Case Signature:** Skip this.

- Click **Save Release of Information**.

Release of Information Data

Clicking 'Save Release of Information' will create a distinct Release of Information for each selected provider.

Provider *	☒ El Programa Hispano Catolico (EPHC) - Agency (2353) ☒ El Programa Hispano Catolico (EPHC) - Coordinated Housing Access Team (CHAT) (6082)
Release Granted *	Yes ▾
Start Date *	08 / 01 / 2026  
End Date *	08 / 01 / 2033   
Documentation	Verbal Consent ▾
Witness	Sam Smith
Client Signature	
Case Manager Signature	
	

two providers are selected

skip Client and Case Manager signatures

Wellsky added the new ROI buttons in early August, 2026. HSD does not require the use of these buttons. Data added to Client Signature and Case Manager Signature will not be migrated to Clarity HMIS.

4. Program Entry/Exit tab

- Click **Entry/Exit** on the main menu bar.
- Click **Add Entry/Exit**.
- Check the box next to the household type to select the entire household.
- Click **Search** to select the CHAT program 6082 from the **Provider Search** box.
- **Provider:** CHAT
- **Type:** select **Basic**.
- **Project Start Date:** must equal the ROI start date. In this example, 08/01/2026.
- Click **Save & Continue**.

YOU WILL SEE NO ENTRY QUESTIONS FOR CHAT.

Entry Assessment

Household Members	Household Data Sharing
(171) Doe, John ✓ Age: Unknown Veteran: No (HUD) (174) Doe, Jane ✓ Age: Unknown Veteran: No (HUD)	Client: (171) Doe, John Entry Assessment No Basic Entry Assessment has been specified for this Provider

- Click **Exit** to close this entry popup.

5. Case Manager

a. Add a Case Manager

- Click **Case Manager** on the menu bar.
- Click **Add Case Manager**.
- Click the **Me** option to set yourself as the Case Manager.
- Click **Search** to switch to your agency's CHAT Provider.
- **Start Date** should be the date you started working with the client.
- Click **Add Case Manager**

☒ (122) Couple With No Children
☐ (171) Doe, John
☒ (174) Doe, Jane

Type *	☐ Community Services User ☒ Me ☐ Other
Name *	Sam Smith
	ssmith@abc.com
Provider *	El Programa Hispano Catolico (EPHC) - Coordinated Housing Access Team (CHAT) (6082) Search My Provider
Start Date *	08 / 01 / 2026
End Date	/ /

Add Case Manager

Annotations:

- click search to switch to CHAT program
- select "me" to assign self as a CM
- start date = entry start date

b. Change a Case Manager

DO NOT remove Case Managers from other programs/agencies. Edits should only be made to CHAT Case Managers within your agency.

- Click on the pencil next to the name of the former Case Manager.

Case Managers

	Name	Provider
	Sam Smith	El Programa Hispano Catolico (EPHC)

Add Case Manager

- Set the End Date to the day before a new CM is assigned. For example, a new CM starts on 09/15/2026, end date of the previous CM is 09/14/2026.
- Click Save Case Manager
- Follow the steps 5a. above to add a new Case Manager.

Type *	☐ Community Services User ☒ Me ☐ Other
Name *	Sam Smith
Title	
Phone Number	
Email Address	ssmith@abc.com
Provider *	El Programa Hispano Catolico (EPHC) - Coordinated Housing Access Team (CHAT) (6082) Search My Provider
Start Date *	08 / 01 / 2026
End Date	09 / 14 / 2026

Save Case Manager

Annotation: End date = one day before a new CM is assigned

6. Assessments tab

Enter a service transaction each time you help a client obtain documents.

- Click **Assessments** on the menu bar.
- Choose **OR-501: Coordinated Access Document Readiness** assessment.
- Click **Submit**.
- Click the paper clip icon to begin the document upload process.
- Click **Add** under Documents required to Obtain Housing - Top Priority box to record the document type information.

Client Information | Service Transactions

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

Select an Assessment

OR-501: Coordinated Access Document Readiness ▼ Submit

OR-501: Coordinated Access Document Readiness

Documents required to Obtain Housing - Top Priority

Date Completed

Add

Click to record the document type information

select OR-501 then click Submit

Click the paper clip to upload documents

- Choose the document type.
- Click **Save** to exit, or **Save and Add Another** to record additional documents.

Add Recordset - (171) Doe, John

Documents required to Obtain Housing - Top Priority

Date Completed	08 / 01 / 2026
Top Priority Documents Collected	Photo ID (4 programs require pre-enrollment, but most prefer to have it)
Date Document Ready - ALL Top Priority Documents are COMPLETE (Only Answer Once)	
Leave Blank	

Save Save and Add Another Cancel

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Exit from CHAT

When you want to exit clients from CHAT.

- Click Entry/Exit on menu bar.
- Look for the CHAT program, click the pencil next to the Exit data column.
- Choose the entire household.
- Select an appropriate exit date.
- Select a Reason for Leaving.
- Select a Destination.
- Click **Save & Continue**.
- Click **Exit** to close the pop-up window.

Entry / Exit

Program	Type	Project Start Date	Exit Date
El Programa Hispano Catolico (EPHC) - Coordinated Housing Access Team (CHAT) (6082)	Basic	08/01/2026	

Edit Exit Data - (171) Doe, John

To update Household members for this Exit Data, .

☐ (122) Couple With No Children
☒ (171) Doe, John
☐ (174) Doe, Jane

Edit Exit Data - (171) Doe, John

Exit Date * 09 / 01 / 2026

Reason for Leaving -Select-

If "Other", Specify

Destination * -Select-

If "Other", Specify

Notes

Save & Continue Cancel

When CHAT clients come back within 3 months.

- Click the pencil next to the Exit data column.
- Click the **trash icon** next to Edit Exit data.
- Confirm **Yes**.

☐ (122) Couple With No Children
☒ (171) Doe, John (Exit Date: 09/01/2026 10:52 AM)
☒ (174) Doe, Jane (Exit Date: 09/01/2026 10:52 AM)

Edit Exit Data

Exit Date * 09 / 01 / 2026

Reason for Leaving Completed program

If "Other", Specify

If the client comes back after 3 months or longer from program exit, create a new program entry.