Updated: 10/01/2026

Homeless Services Department

Permanent Supportive Housing (PSH) Data Entry Handbook

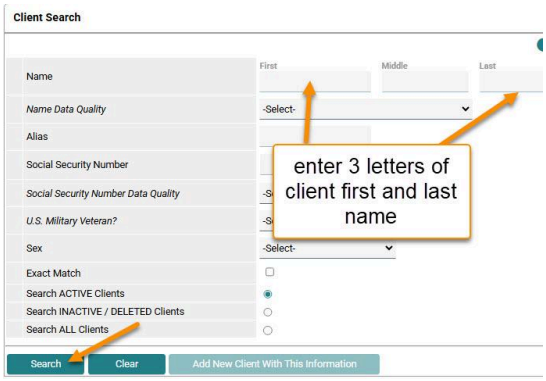
This handbook provides instructions to enrollment and exit participants into and out of a PSH program. Please contact us at hmishelp@multco.us for questions.

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1. Participant Search /Add Participant Process

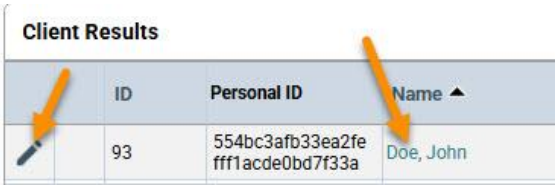
- Click **Clients** from the left hand navigation panel from the homepage.
- Search participants by entering the first three letters of their first name and first three letters of their last name.
- Click **Search.**



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.

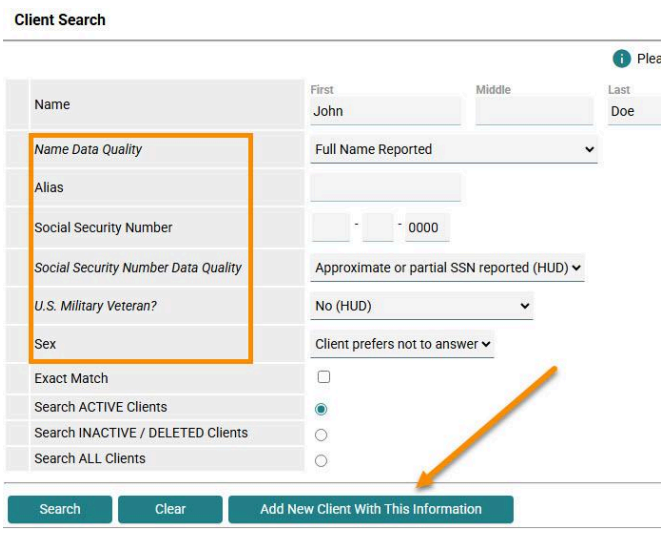
a. <u>If the participant record exists</u>



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

b. <u>If the participant record does not exist</u>

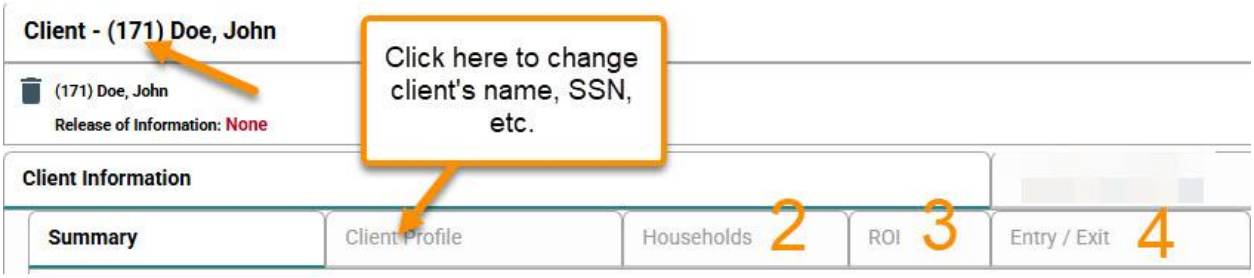
- If Client Results yields **No Matches**, continue with the Data Quality fields, then click **Add New participant With This Information.**



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.

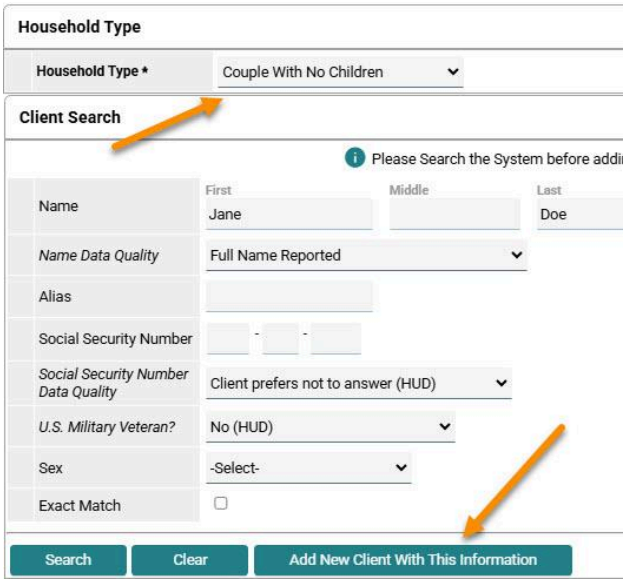


Continue with the data entry process in the following three important tabs to complete the entire PSH workflow.

- Households
- ROI
- Entry/Exit

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.

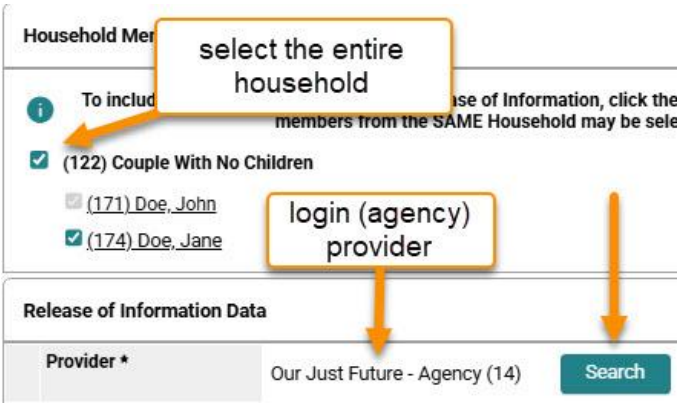


3. Release of Information tab (ROI)

All members of the household enrolled in the PSH 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 PSH B2H program (2554) from Our Just Future.

- 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**.

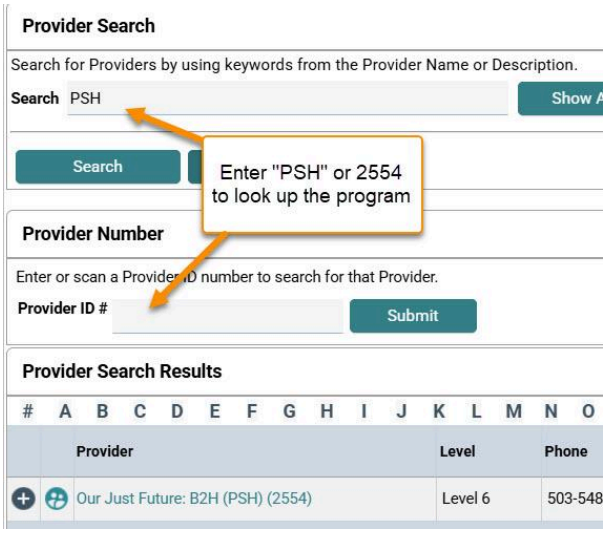


In order for other agencies to see the PSH assessment - you must select 2 providers:

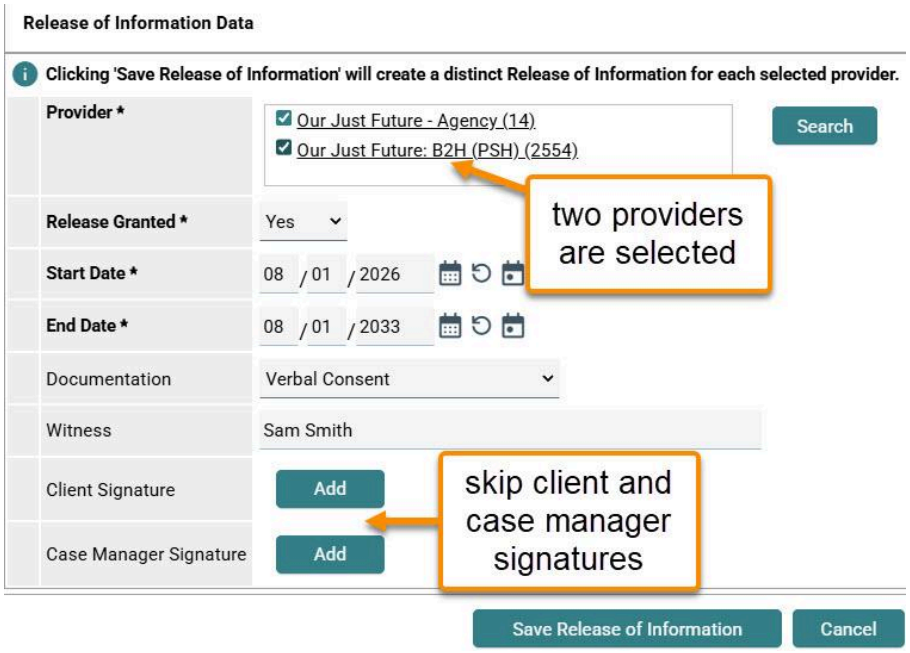
1) Login or agency, this is chosen by default, in this example, Our Just Future.
2) Project or program, where you enroll clients in, in this example, PSH B2H program 2554. Each provider/program in HMIS is assigned a 4 digit number.

A Provider Search pop-up appears.

- Enter “PSH” in the **Search** box or the provider ID 2554 in the **Provider ID** box to look up the program.
- Click the **plus sign** to the left of the B2H PSH to select it.
- Click **Exit** to close the Provider Search box.



- **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.**

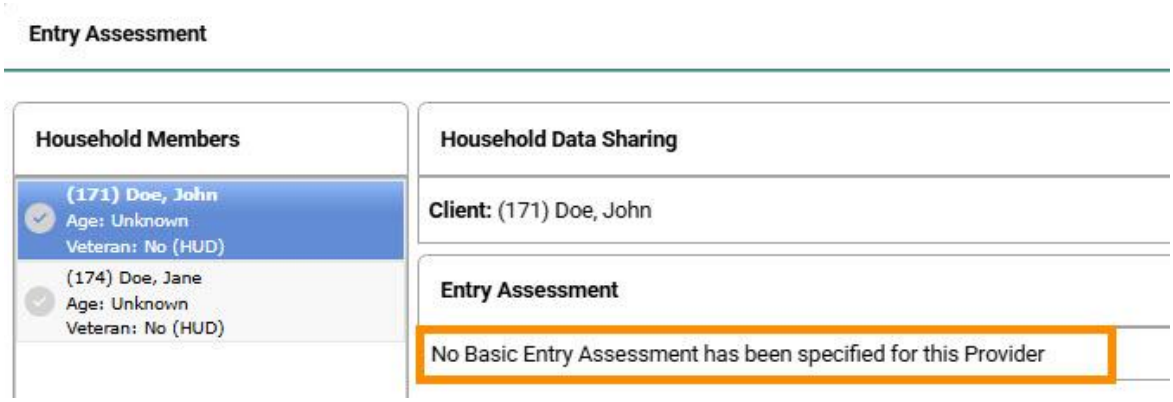
Wellsky added the new ROI buttons in early August, 2026. HSD does not require the use of these buttons. Data added to Client Signature and Case Manager Signature will not be migrated to Clarity HMIS.

4. Program Entry/Exit tab

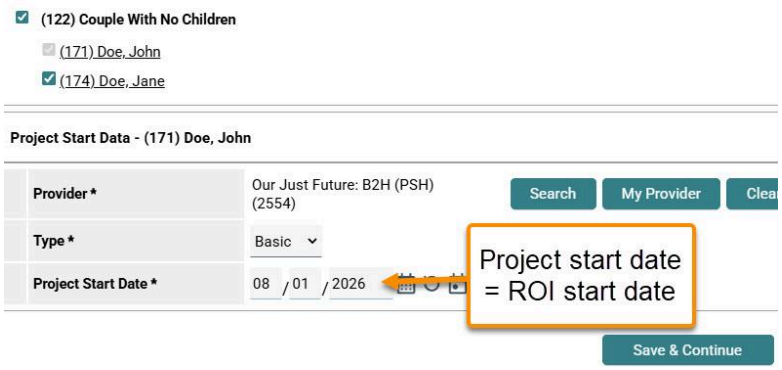
a. Entry

- 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.

The agency provider is set by default and it does not carry an assessment. If you proceed with this agency provider by mistake, you will see this error message:

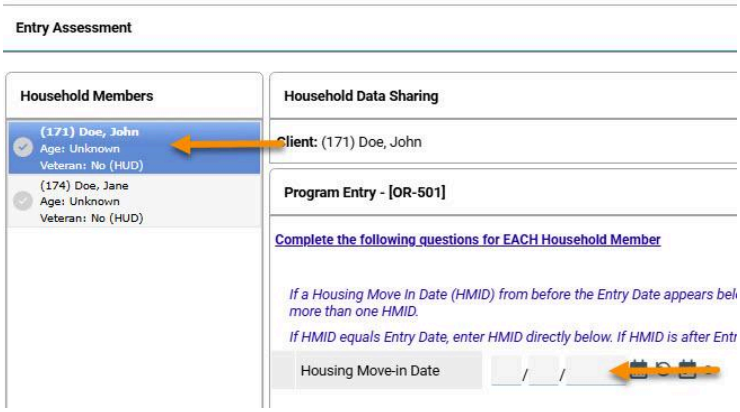


- Click **Search** to select the PSH program from the **Provider Search** box. Revisit this step if needed.
- **Provider**: PSH B2H.
- **Type**: select **Basic**.
- **Project Start Date**: must equal the ROI start date. In this example, 08/01/2026.
- Click **Save & Continue**. An Entry/Exit Data (PSH main assessment) popup appears.



b. Housing Move In Date (HMID)

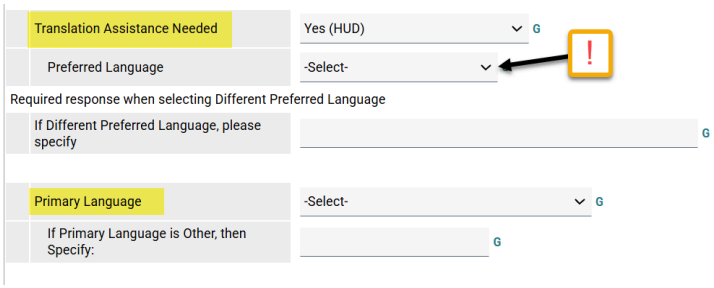
The Head of Household's name is highlighted on the left menu because we will do intake for the Head of Household first, and continue the same assessment with the rest of the household.



HMID is a critical data element in PSH that many users either miss or enter incorrectly. Remember, **HMID must be on or after the program entry date only, never prior.**

If clients are not housed on the entry date, leave HMID blank. If clients were housed before the entry date, or transferred from another PSH provider, HMID must equal the entry date and the ROI start date.

- **HMID:** John and Jane Doe were not housed so we leave HMID blank.
- **Relationship to Head of Household:** select **self** (Head of Household) for John Doe.
- **Enrollment CoC**: Select OR-501 Portland/Gresham/Multnomah County.
- **DOB** and **Date of Birth Type:** if John declines to answer, leave DOB blank and select **client doesn't know** or **client prefers not to answer.**
- **Gender** identity and **race/ethnicity** identity. To select multiple values, hold down the "ctrl" key on PC or "cmd" key on Mac and click on each value.
- Answer if Translation Assistance is Needed and if 'yes', identify which language is needed.
- Select Primary language.

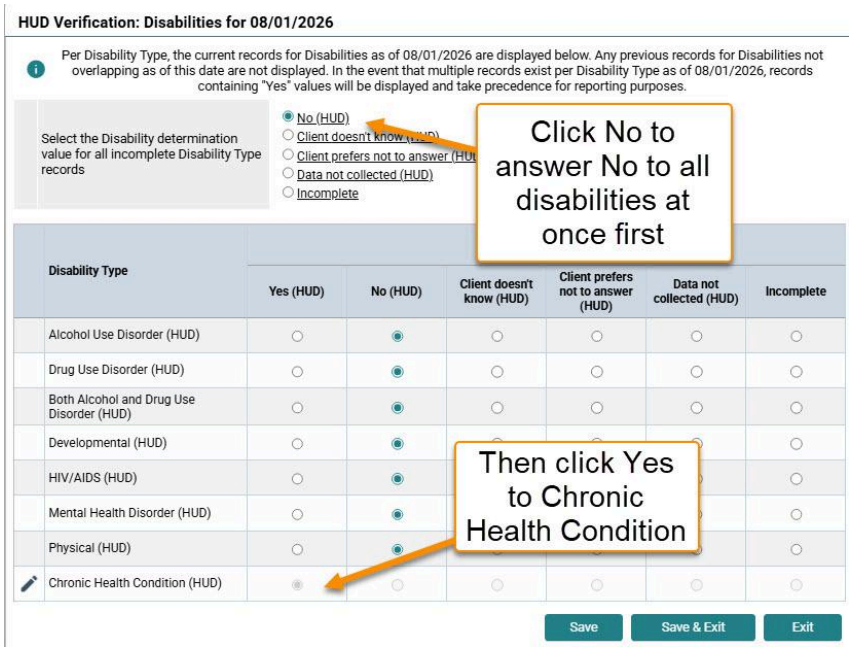


c. HUD verification sub assessments

Disabilities, along with **Health Insurance, Income and Non Cash Benefits**, is one of the four (4) HUD verification sub assessments you must verify and can change over time during program enrollment. They are marked with a red triangle warning sign to the right and a verification question on top.



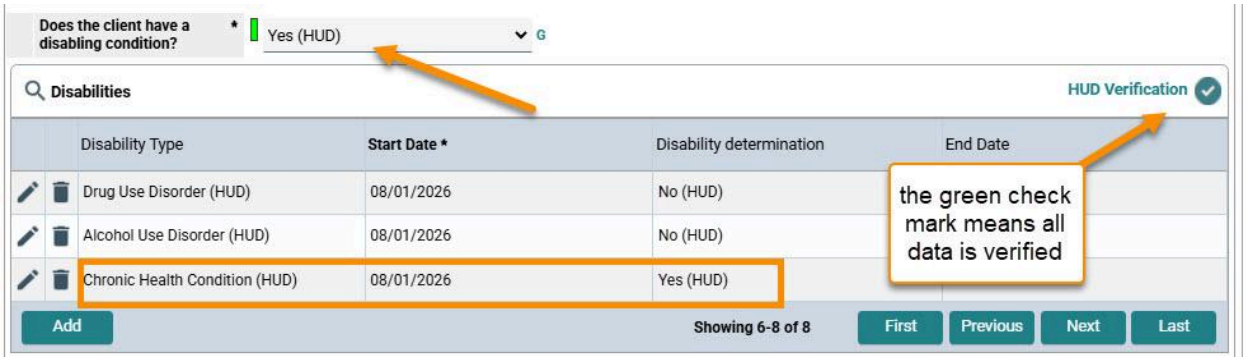
- Click the red triangle warning sign to open the disabilities sub assessment.
- Select **No** on top to answer No for all disabilities at once.
- Select **Yes** to one or more conditions accordingly, in this example, **Chronic Health Condition**. *These disabling conditions are self-reported and do not require notes from doctors*.



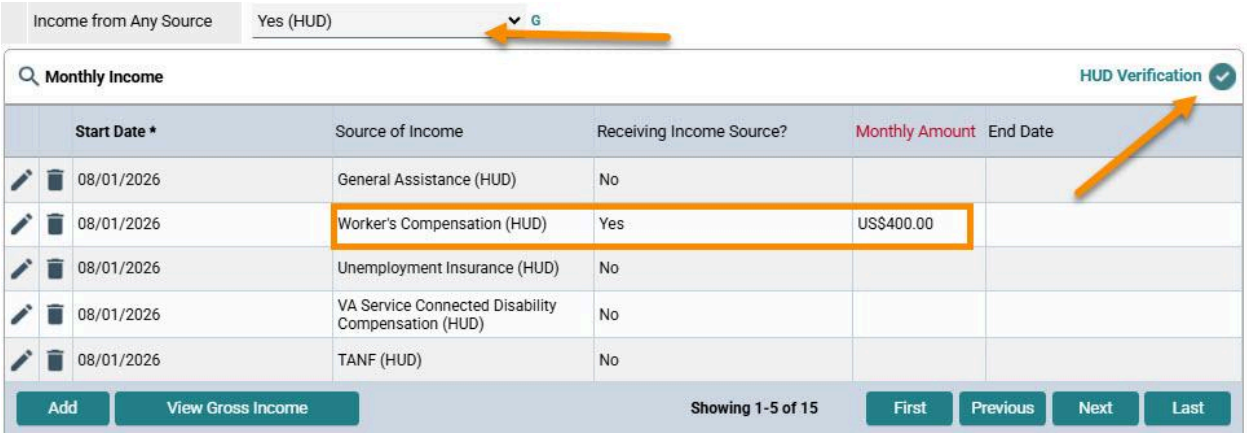
- Enter some notes for the condition (not required) in the **Add Recordset popup**.
- Click **Save**.
- Click **Save & Exit**.
- Answer **Does the client have a disabling condition:** select **Yes** as John had at least one condition, Chronic Health Condition. If John did not have any disabilities, select **No**.

Examples

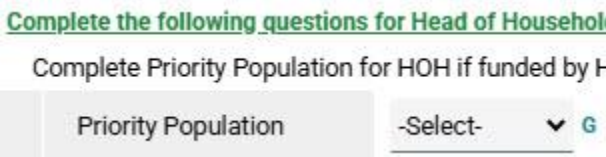
1. This is an example of an accurate verification. A red triangle warning sign is replaced by a green check mark and the question on top matches the sub assessment.



2. This is another example of John reporting $400 monthly income from Worker's Compensation at intake on August 1, 2026.



SHS Priority Population (population A/B)



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 all programs receiving *any* HSD funding.

The Pop A/B form must be included as part of the intake and can be downloaded from our department website https://hsd.multco.us/hmis-links-for-providers/pop-a-b-forms/

- 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.

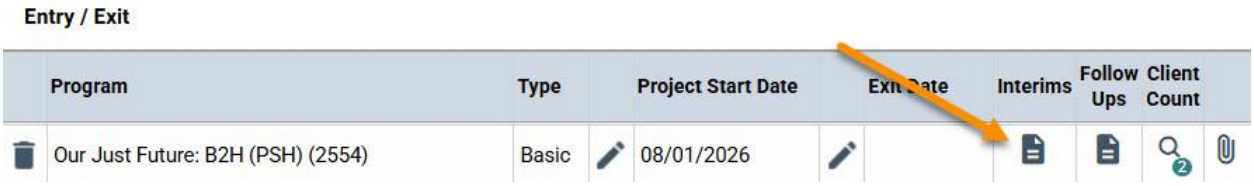
Population B includes anyone who is not in Population A.

Continue with Health Insurance, and Non Cash Benefits and the rest of the PSH assessment.

- Click Save to finish John's assessment.
- Move up the page, click the rest of the household members' tabs on the left menu to start the intake for them.
- Click Save & Exit once finished.

This is an example of accurate program enrollment.

- Click the Interims icon to enter updates or changes in clients' situations.

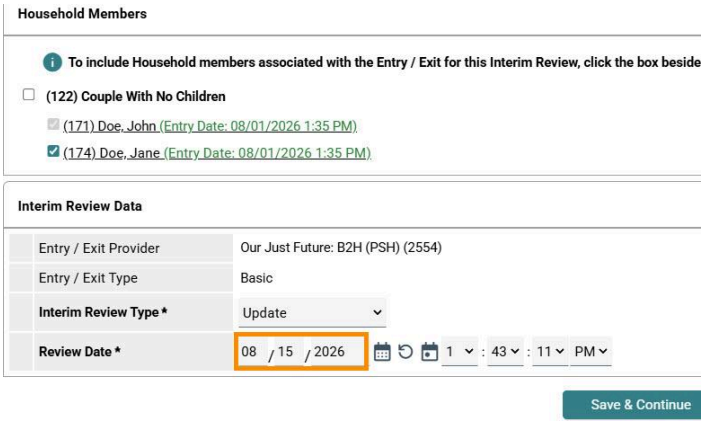


d. Interims

Any updates or changes that happen after intake (in this example, 08/01/2026) must be recorded in Interims.

Here is the first scenario: John was housed on 08/15/2026.

- Click **Interims** icon
- Click **Add Interims Review**
- **Interims Review Type:** unscheduled update or update
- Review Date: **08/15/2026**
- Click **Save & Continue**



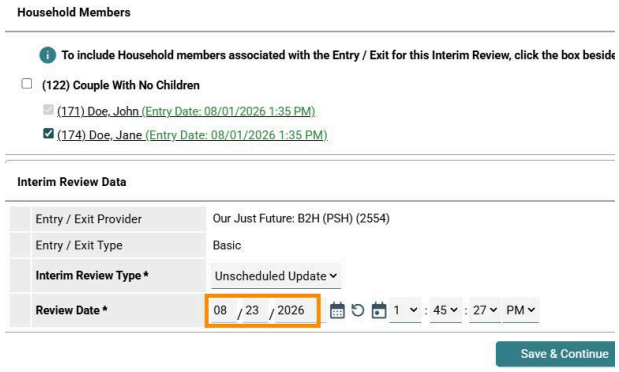
You will see the same assessment but HMID is still blank. Fill in HMID accordingly. HMID in Interims indicates that clients are housed at a later date after intake.



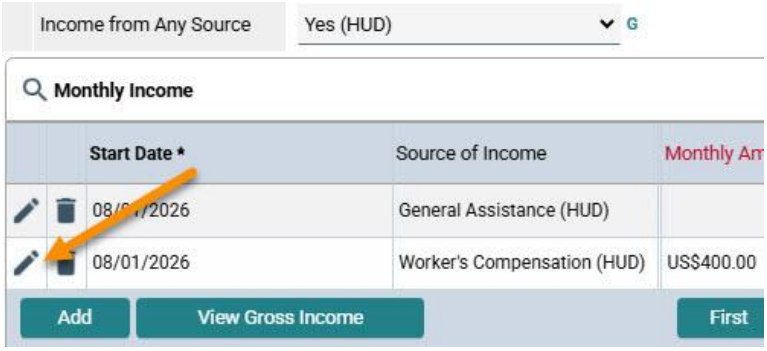
- Scroll down to the end of the page, click **Save & Exit**.

Here is the second scenario: and a few days later, on 08/23/2026, John reported the $400 monthly income from Worker's Compensation ended. The process involves two steps: first reflect the $400 was available from the project start date 08/01/2026 until the end of 08/22/2026, then starting on 08/23/2026, the $400 was no longer available.

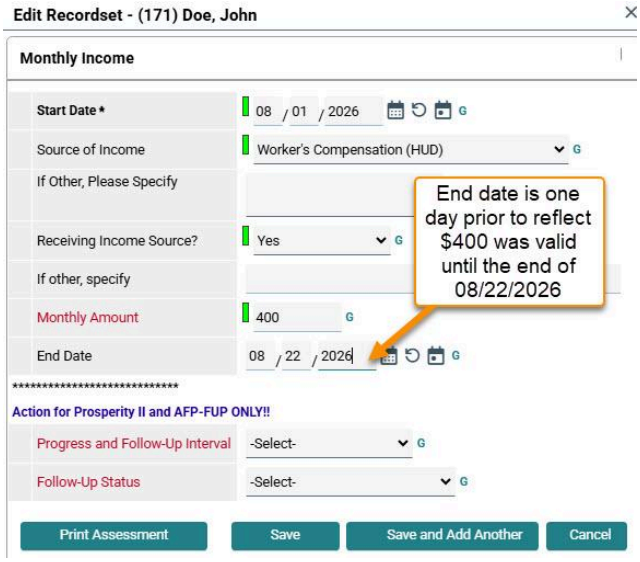
- Click **Interims**.
- Click **Add Interims Review.**
- **Interims Review Type:** unscheduled update or update.
- Review Date: **08/23/2026.**
- Click **Save & Continue.**



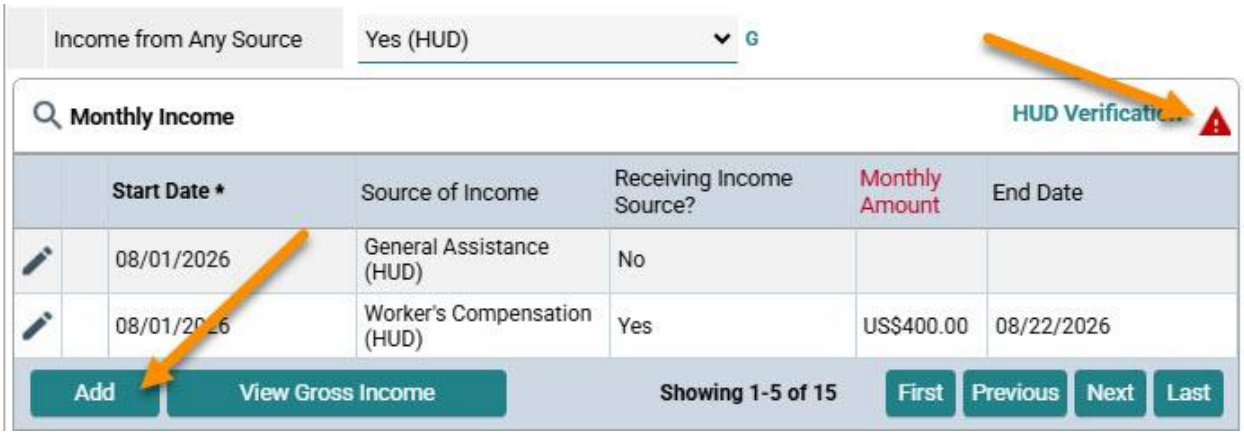
- Click the pencil to edit Worker's Compensation.



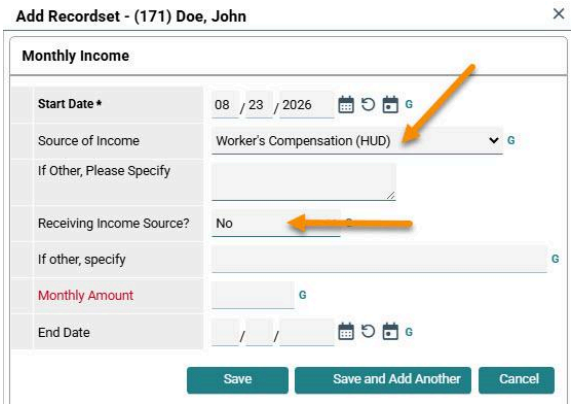
- In the Edit Recordset popup, put in the end date one day earlier, 08/22/2026.
- Click **Save**.

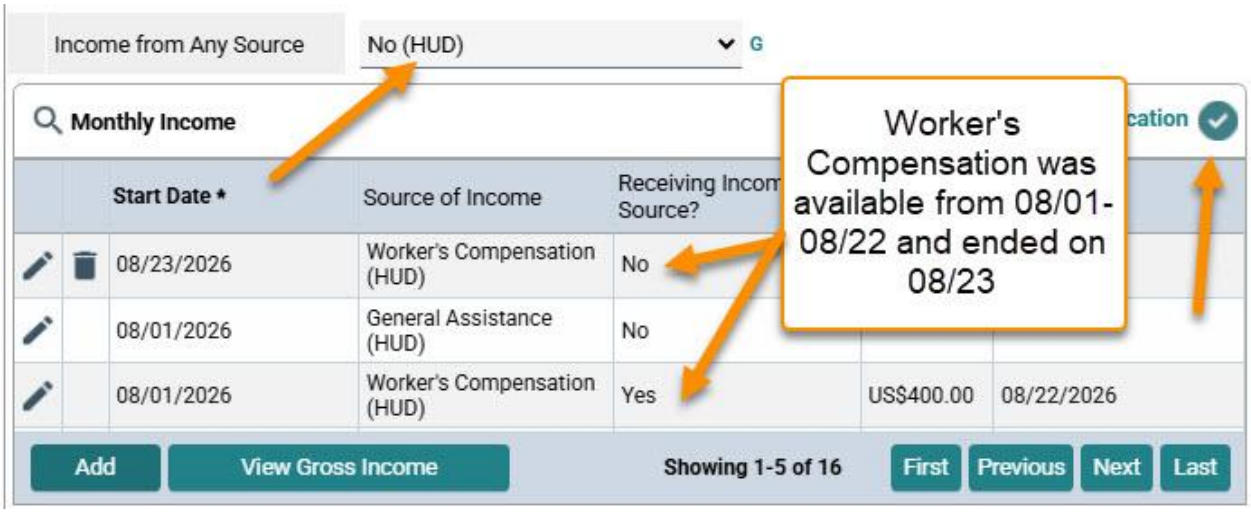


The popup goes away but now you will see the red triangle warning sign is back.



- Click Add
- Source of Income: Worker's Compensation
- Receiving Income Source?: No
- Click Save.
- Income from Any Source: select No because John now had no other incomes.





e. Exit

Participants should be exited from the PSH program when they are no longer being actively serviced by it.

★ If the participant was placed into permanent housing using PSH client assistance funds, the participant must receive an exit date of the final day they received that subsidy.

★ If the participant was not placed into permanent housing using PSH client assistance funds, or the participant continued to receive other supportive services beyond the final date of their subsidy, the participant must receive an exit date of the day they stopped working with the PSH program.

- Click the pencil next to the Exit date.
- Check the box next to the household type.
- Reason for Leaving: choose an appropriate selection from the drop down.
- Destination: choose an appropriate selection from the drop down.
- Click Save & Continue
- Make any needed updates in the exit assessment. Once all updates are complete, scroll to the bottom and click Save & Exit.

