2015

HMIS Reference Manual

THE PLANNING COUNCIL
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Contents

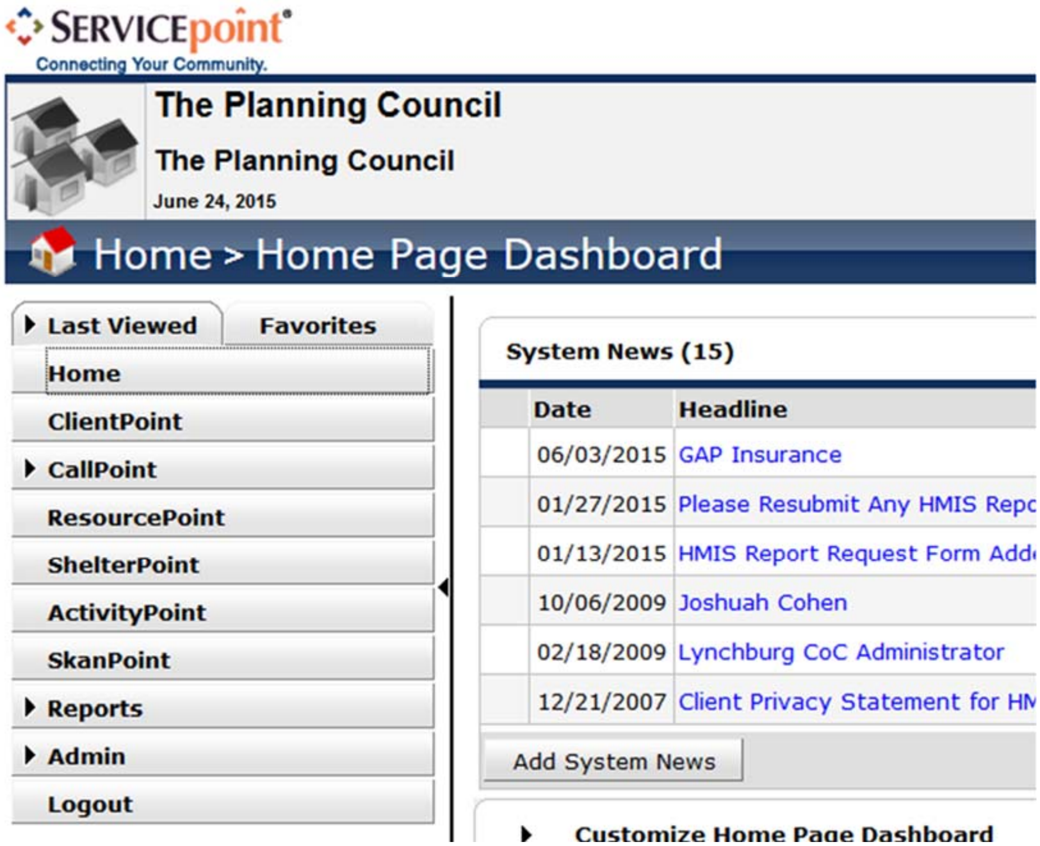
Disclaimer

This guide is to be used as a reference. This is not a replacement for training and cannot be used in place of training by a System Administrator. If you have any questions in regards to specific data elements, please refer to the current HMIS Data Standards found at hudexchange.info. If your concerns go beyond what is offered here and beyond the scope of the Data Standards, please contact your System Administrator.

Home Screen

Once you log in to HMIS you will see the title screen.

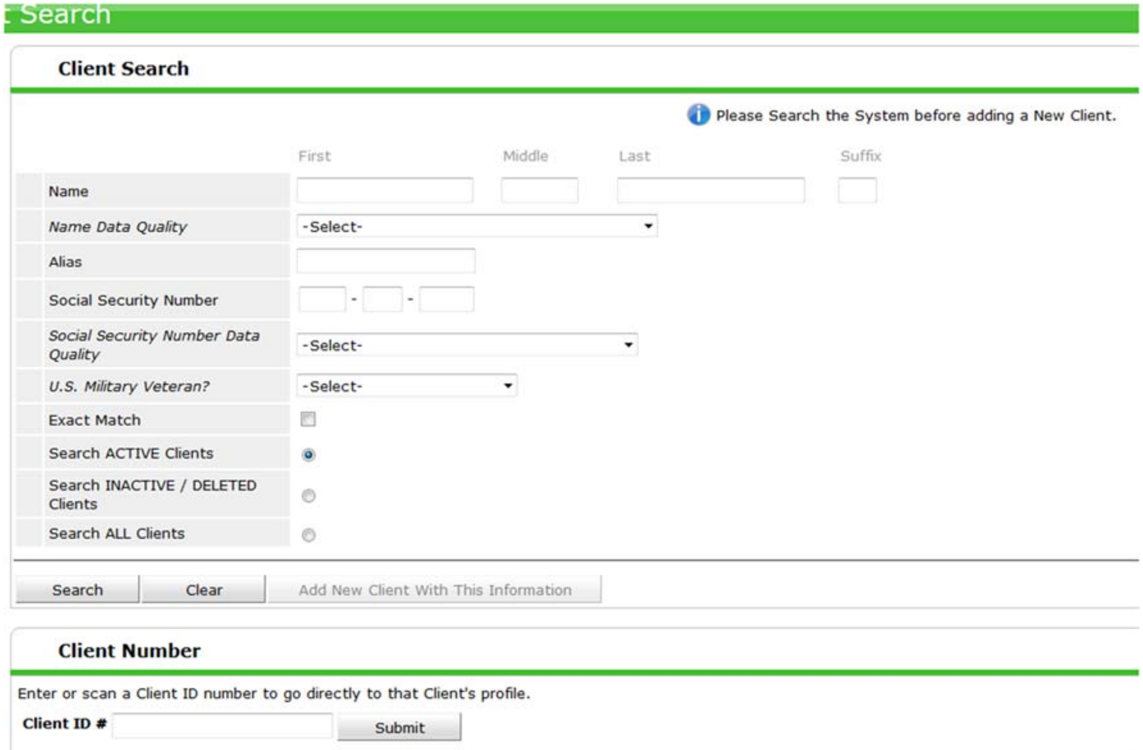
The title screen may have numerous options. We will be focusing on client entry, or ClientPoint.



To advance to ClientPoint, simply click on the button that says ClientPoint.

Client Search

On the Client Search screen, there are several options to use to access a client.



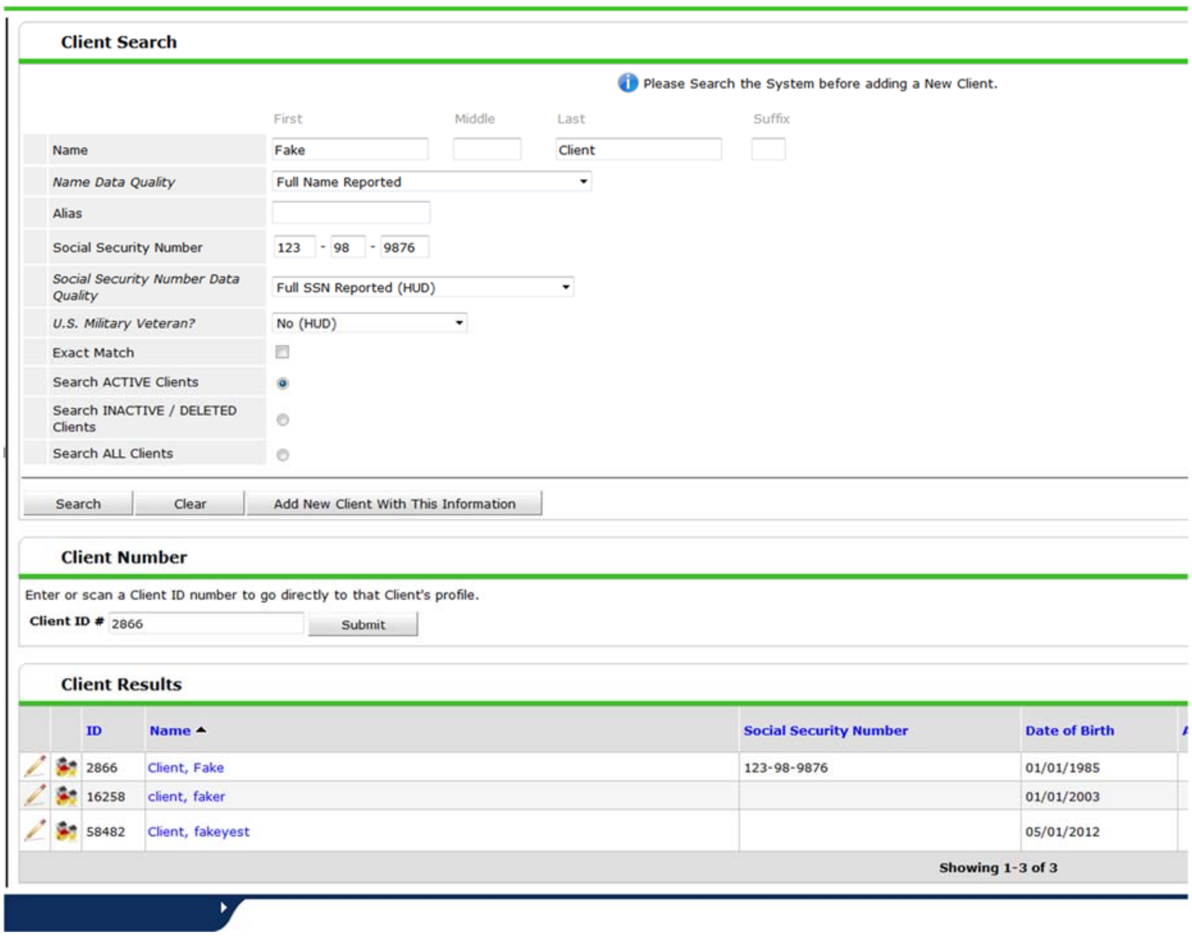
First, you can go directly to the client you need, if you have the Client ID number. This is the ID number that is assigned to the client after creation through HMIS.

Second, if you do not have a Client ID number, you can search for the client's name and social security number.

To do this, fill in the client's first name and last name in their respective text boxes. Then either add the social security number, or search. If you add the social security number, then click search.

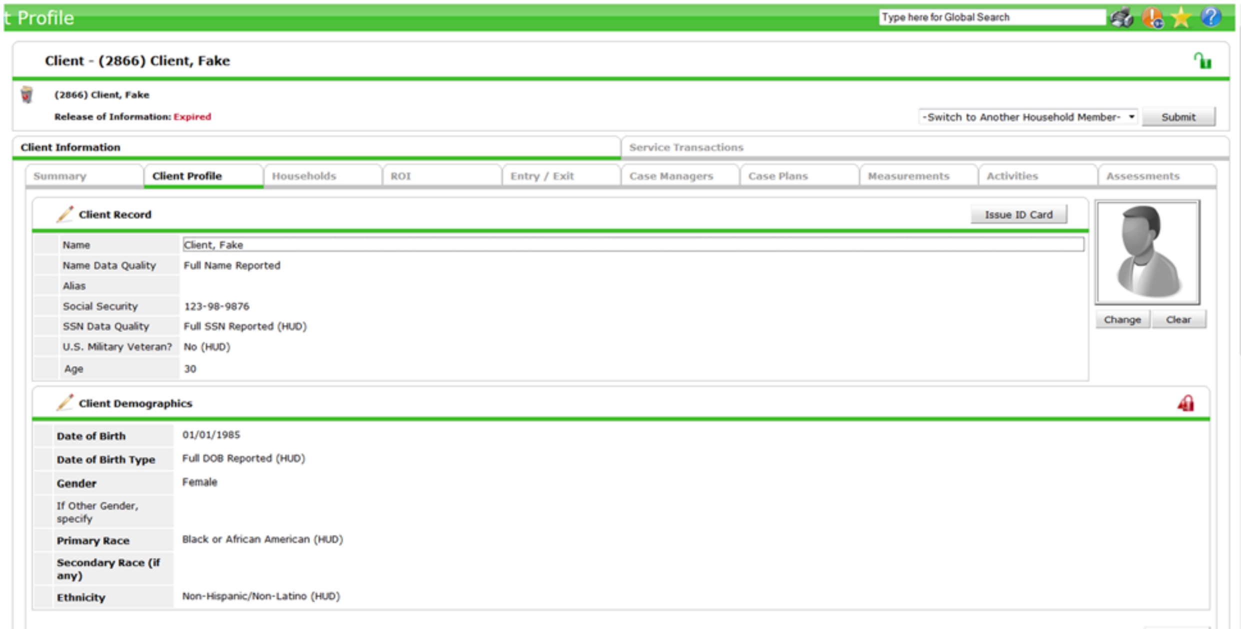
If the client that you are looking for appears in the search results, click the client's name to proceed to the Client Profile.

If the client does not appear in the search results, or the search results are empty, fill in the following questions: Name Data Quality, Social Security Number, Social Security Number Data Quality, and U.S. Military Veteran?. Then search again. If the client is not in the results, then click Add New Client With This Information. A popup will ask that you check the search results, so duplicates are not created. Click Ok on the pop up.



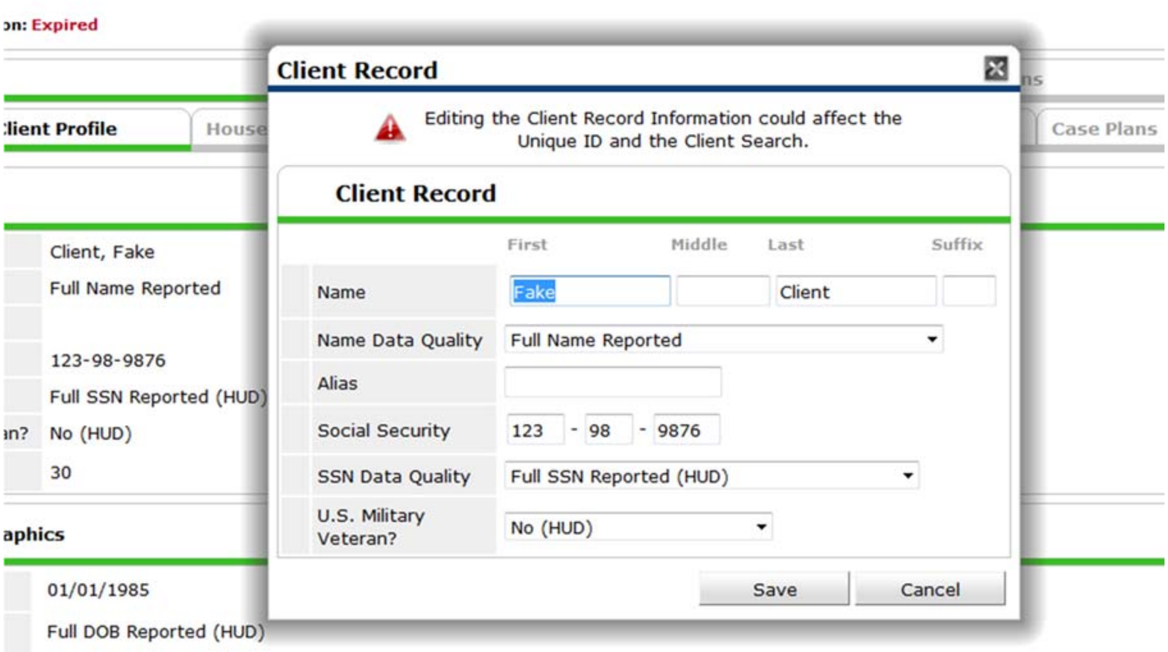
Client Profile

The first object you will want to take notice of, is the client's name. Next to the client's name will be the Client ID number.



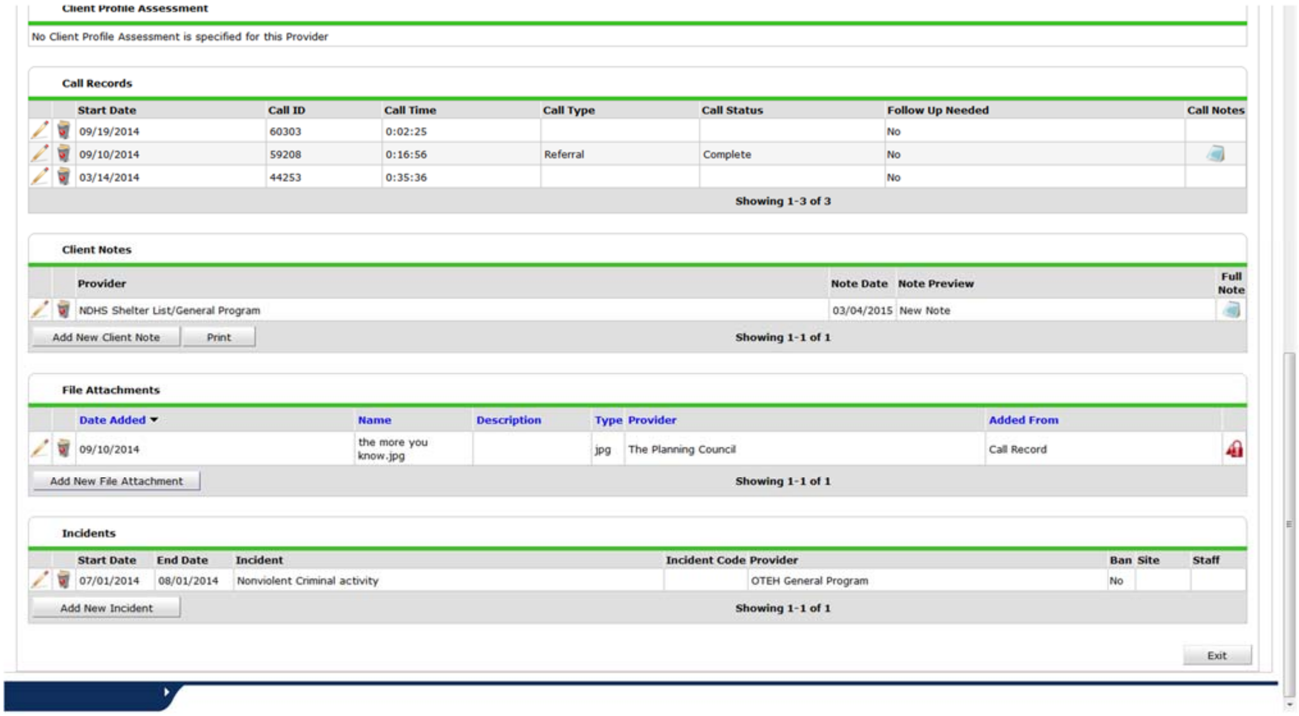
Under the Client Profile you should make any changes to Client Record section that are necessary.

To do this, click on the pencil next to the section that reads Client Record. When the changes are complete, click Save.



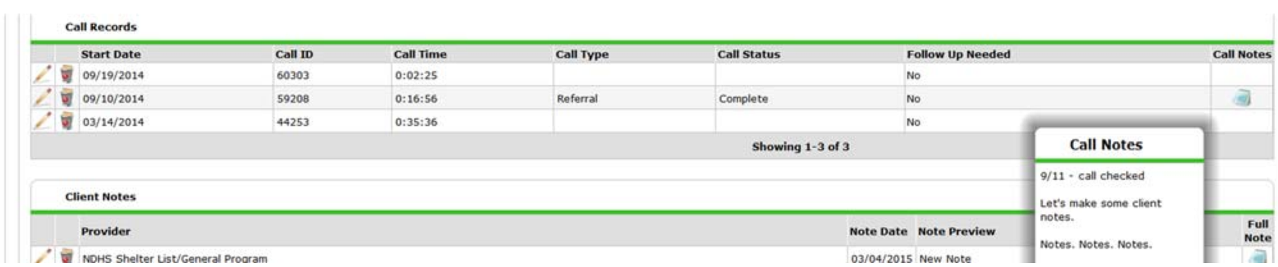
DO NOT EDIT Client Demographics.

If you scroll down the Client Profile, you will see Call Records, Client Notes and File Attachments.



Call Records

Under the section for Call Records, you are able to see if the client has a CallPoint record. On the right side of the call record, there may be a note pad. This note pad allows you to see the Call Notes.



Client Notes

Client Notes are similar to the Call Notes. You can hover over them to read them. These notes need to be non-confidential as they are the notes that are shared to other projects and agencies. Click on Add Client Note to add a new client note.

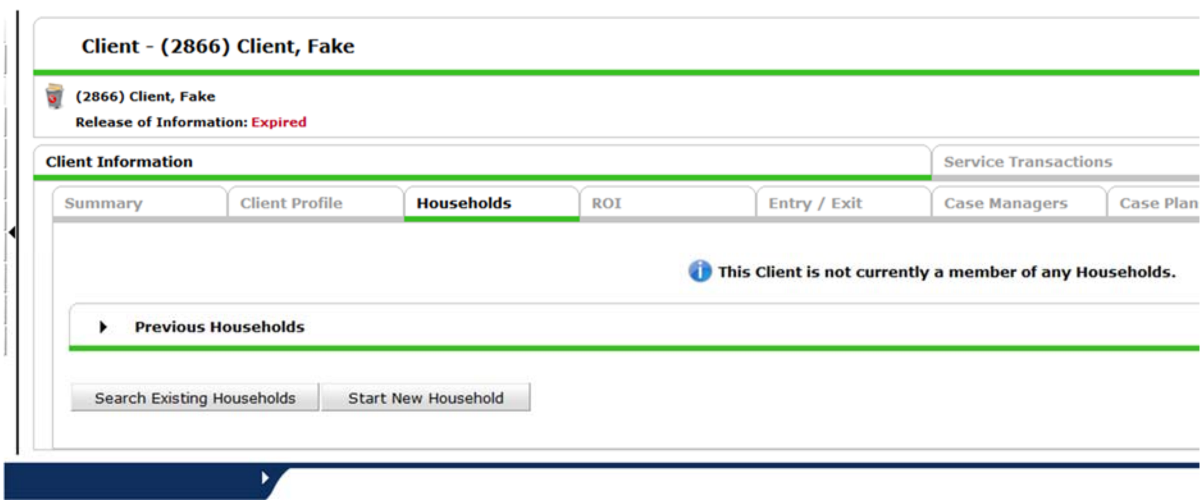
File Attachments

File Attachments are added to a client record to keep track of scanned or created files for the clients. Examples include scans of Birth Certificates or ID cards, or the VHSP pre-screening form. To view or obtain file attachments, click the magnifying glass and click Download.

Households

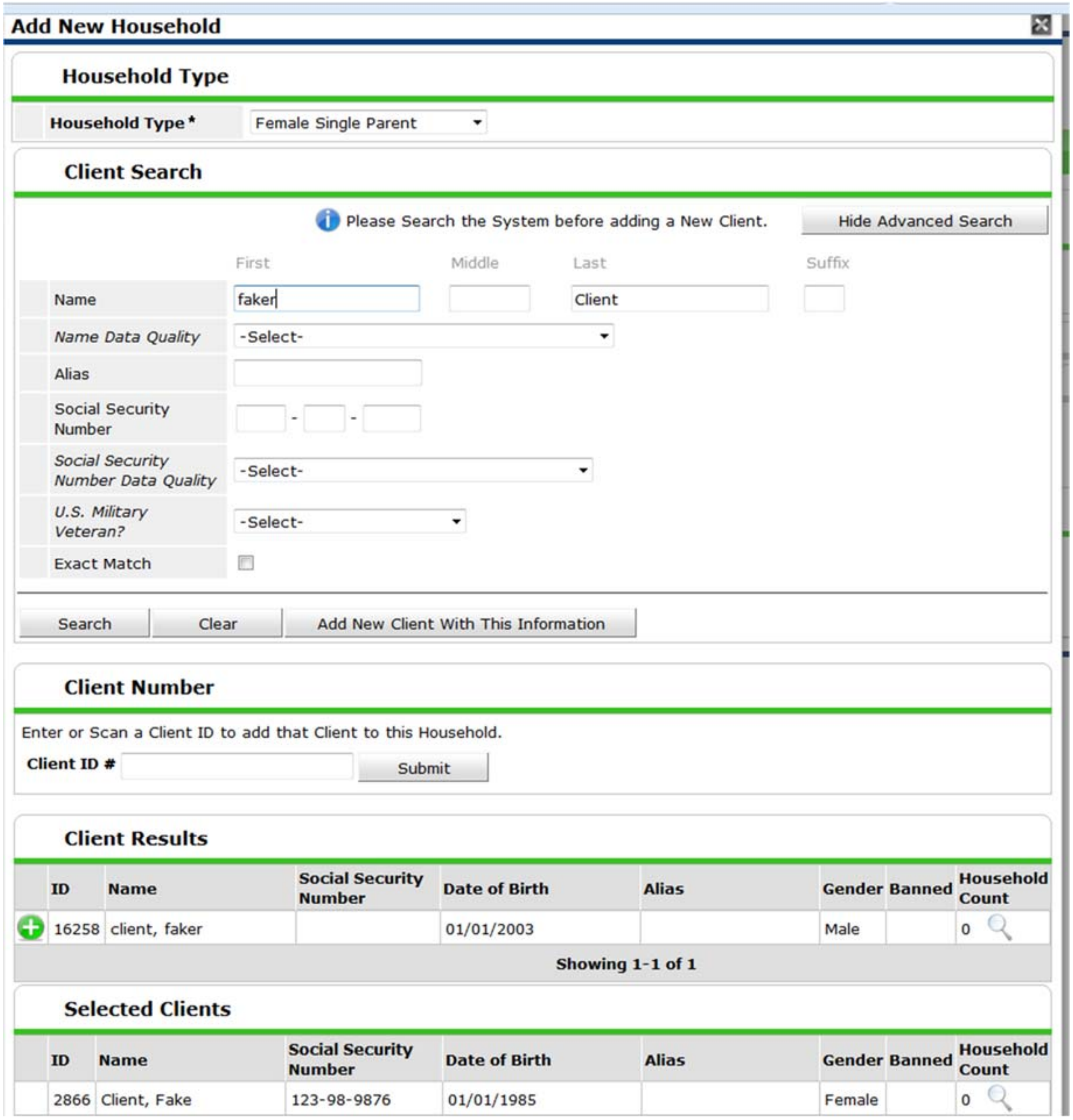
The Households tab allows you to enter the clients that are associated with the client that you are currently working on. To access the Households, simply click the tab labeled Households. If your client is a single client, please proceed to the ROI section.

To start a new household for your client, click Start New Household.



The first question that appears in the popup window is Household Type. You must select a household type that matches the household composition of your client.

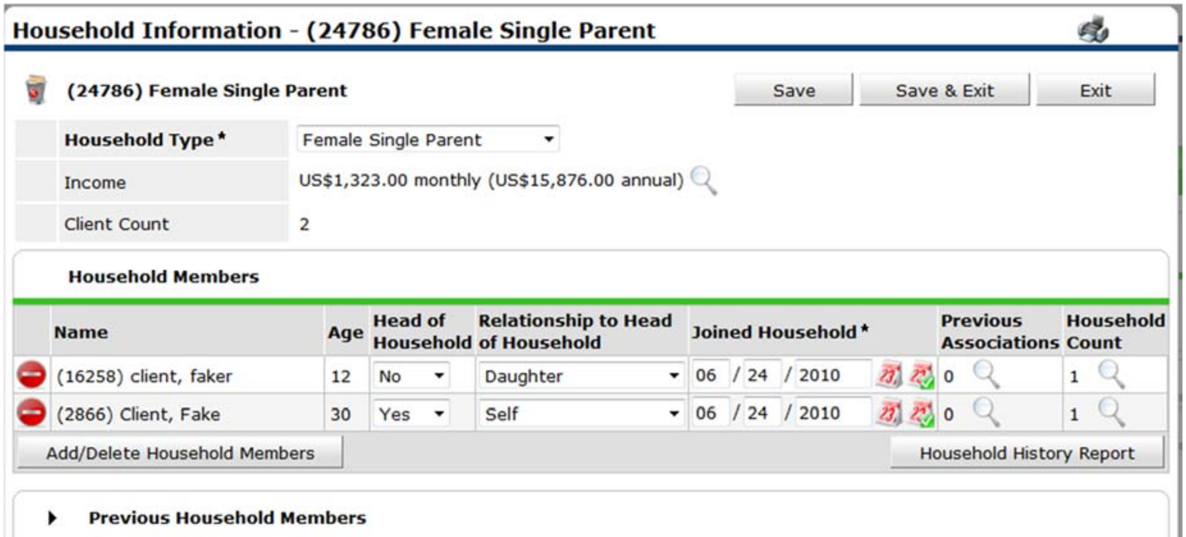
Next is the Client Search section. This is used as it was before, except you are now searching and adding associated clients, as your current client is already added.



When you are finished adding all clients, click Save and Continue.

On the second popup window, fill out the Head of Household, by changing one to Yes. Then fill out the Relation to Head of Household for the remaining clients. Finally, adjust the Joined Household date to the day the clients completed the intake.

Then, Save & Exit.

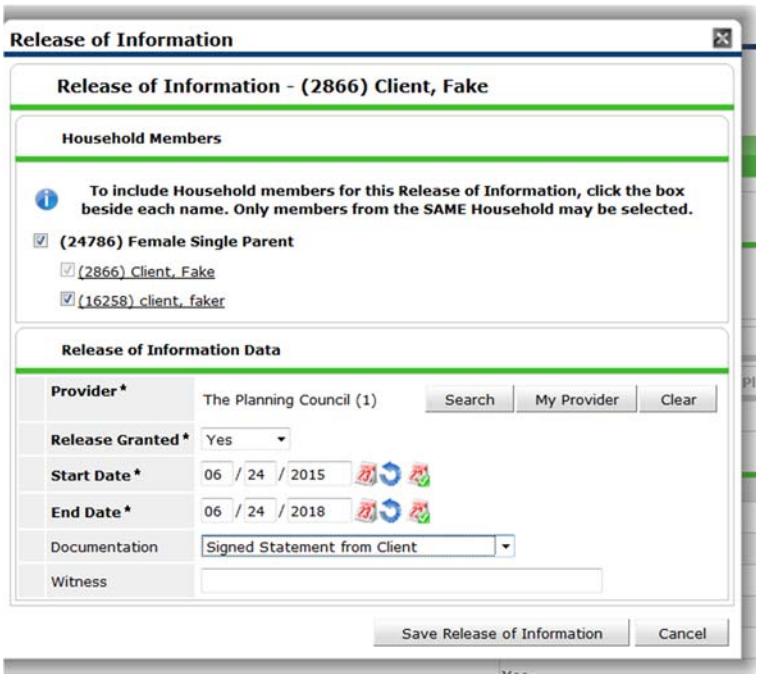


To make edits, click Manage Household.

ROI – Release of Information

The release of information is used to share information about your clients with other agencies.

To add a new ROI, click Add Release of Information. Click on the check box next to the household type and fill out the popup window and click Save. This will either approve or deny a release, depending on what the clients choose.

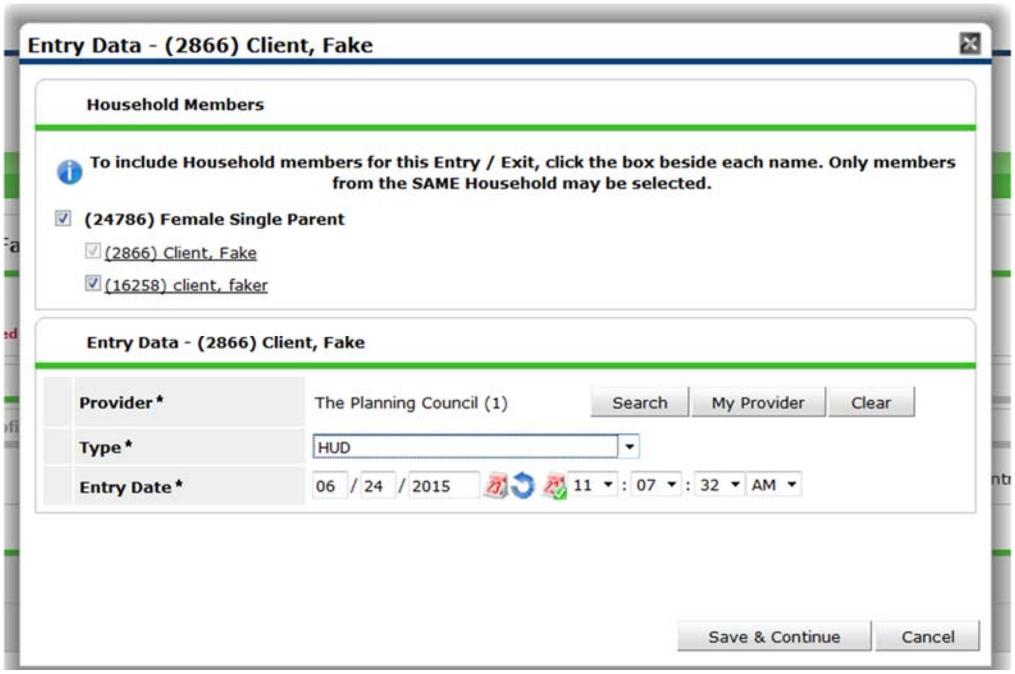


NOTE The release lasts for 3 years, unless specified.

Entry/Exit

The Entry/Exit tab is where you will add the demographic data for your clients and also where you will designate the project that the client is assigned to. Start off by clicking Add Entry/Exit.

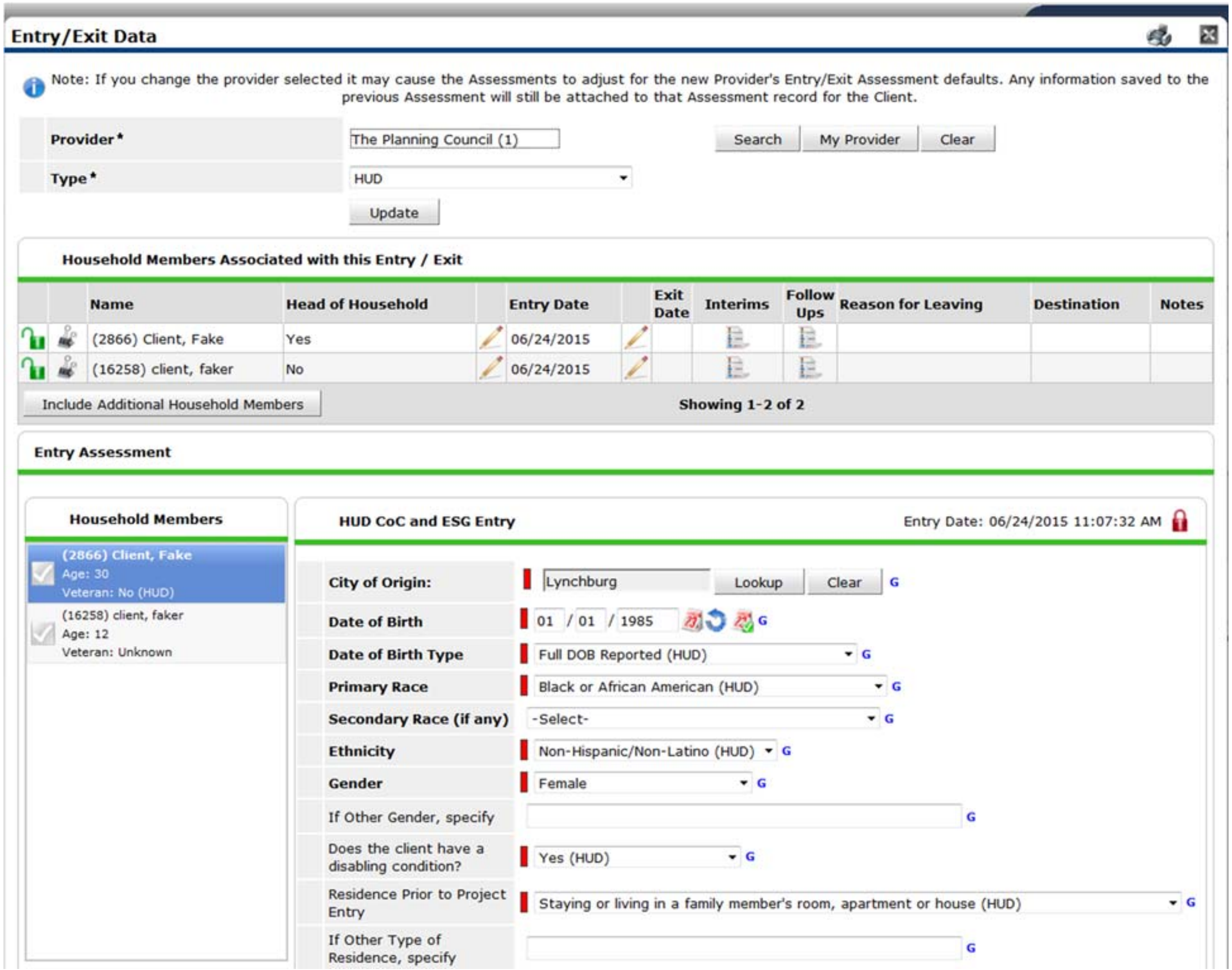
Click on the check box next to the household type. Use the drop down to select the project that the client is going in to. Add the date which they entered the project. Select the appropriate Entry/Exit Type for your project. Click Save & Continue.



Next, check the client list to the side, the one highlighted in blue is the one that you are currently working on. Fill out all the required demographic data for your project. When finished with the first client, proceed to the next client in the household by clicking on their name in the household members section.

NOTE Children (17 or under) need only the bolded information filled out.

Non-funded projects can proceed to the Services or Exit section.

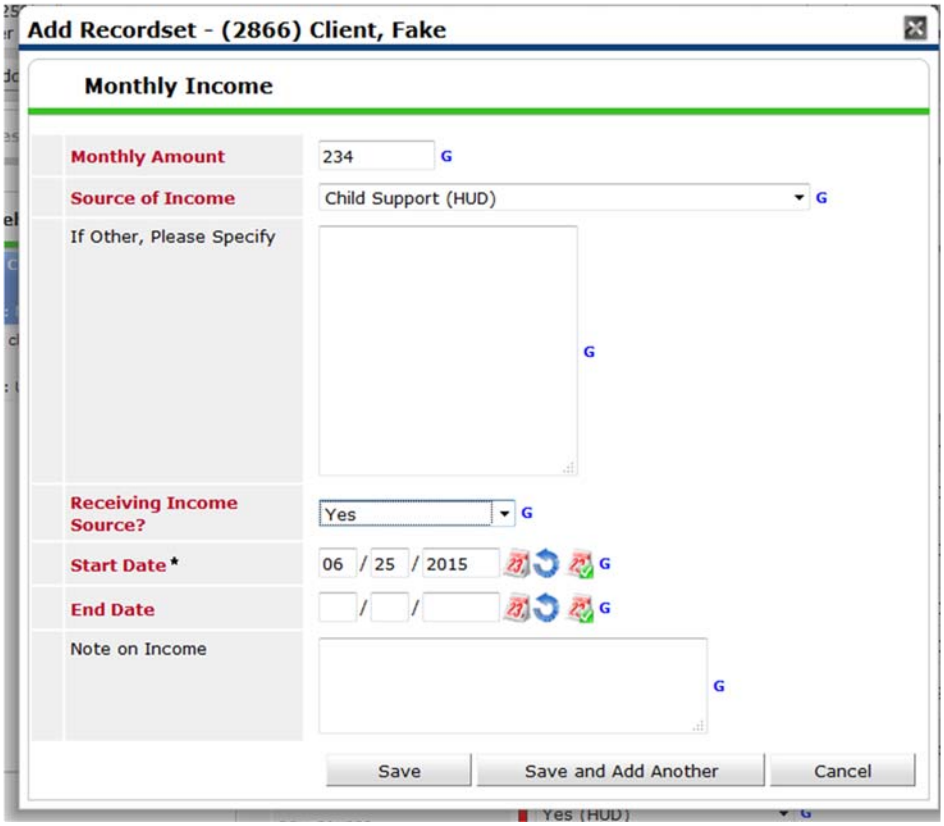


Sub-Assessments and HUD Verification

Funded agencies and projects are required to enter some sub-assessment data. The sub-assessments may include: income, non-cash benefits, disabilities, health insurance, or outreach. With most sub-assessments there is another section that must be completed, the HUD Verification.

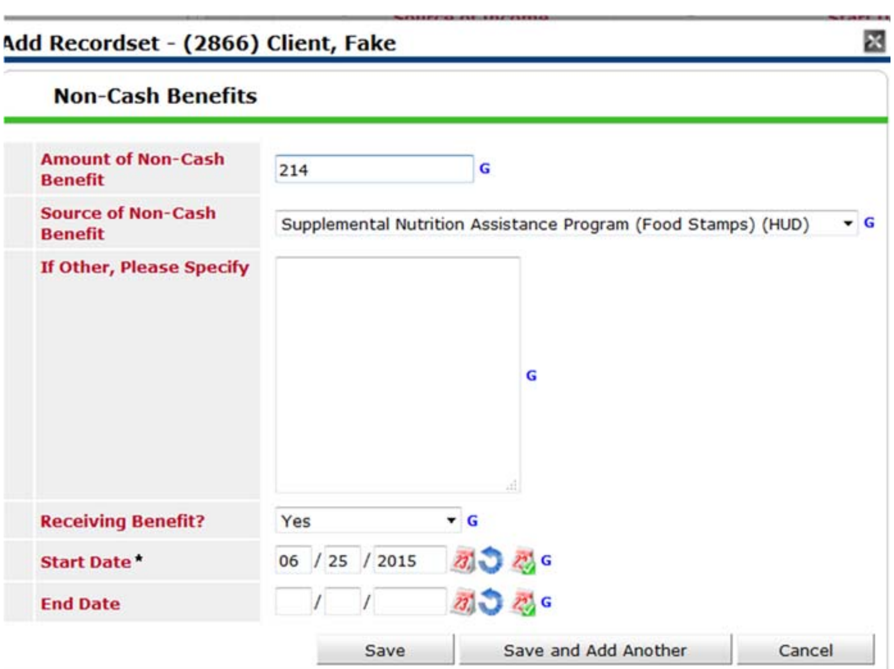
Income

The amount of income needs to be added, along with the source. If the client has multiple sources, break them out individually. Make sure that the Recieveing Income Source question is set to Yes. The Start Date will auto populate with the Entry Date; this is acceptable.



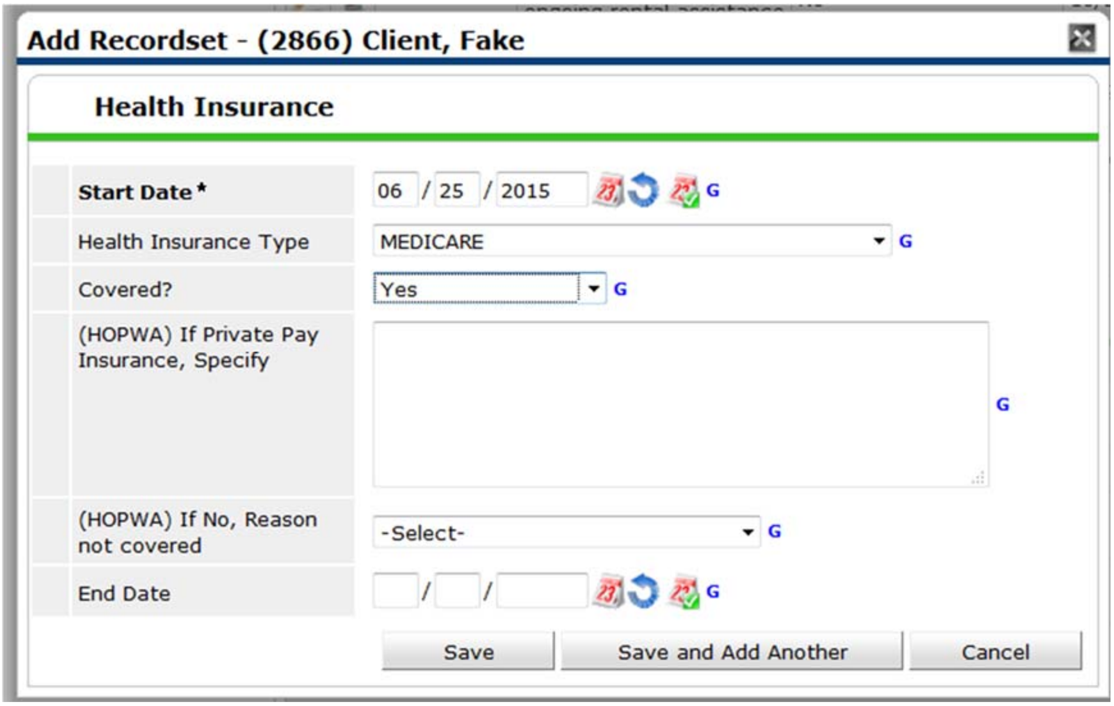
Non-Cash Benefits

Non-Cash is the same process as Income. However, the amount section is only to be filled out for Supplemental Nutritional Assistance Program (SNAP) (Food Stamps).



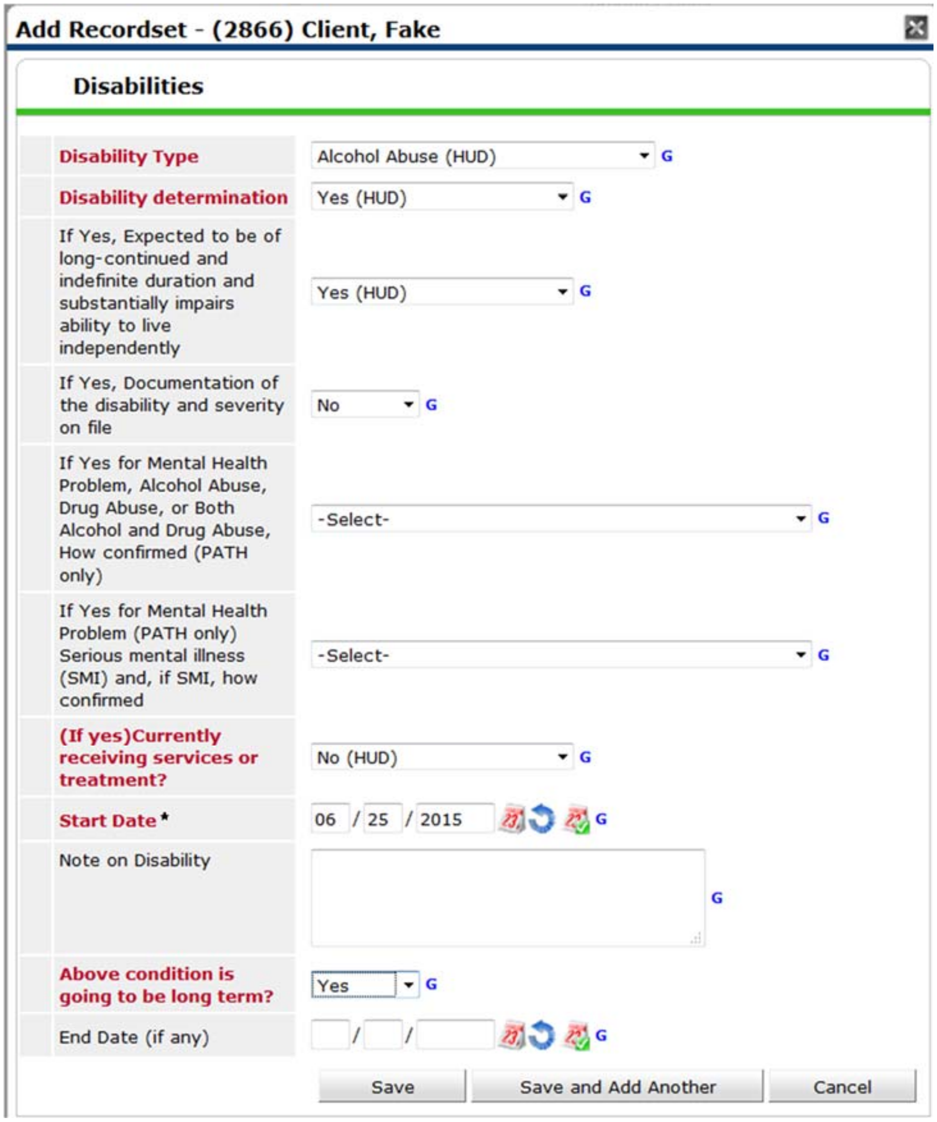
Health Insurance

The fields that are to be completed are: Start Date, Insurance Type and Covered. HOPWA funded projects must answer the two follow-up questions.



Disabilities

Disabilities starts off with Disability Type. Disability Determination is Yes, if the client is reporting this disability. The next two questions must be answered by all funded projects. The How confirmed and SMI questions are PATH only questions and the final questions are for every funded project. When completed, either Save and Add Another or Save, to exit.

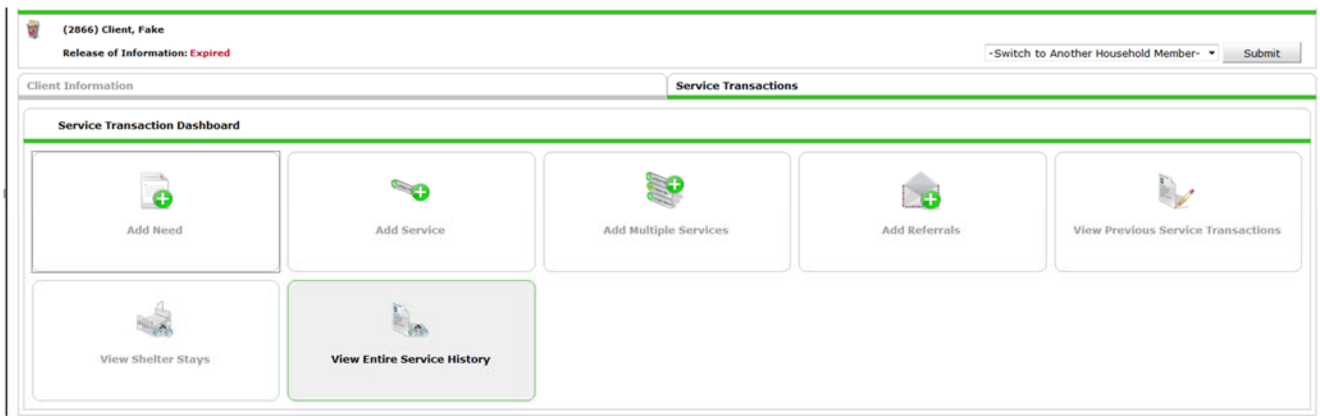


Referrals

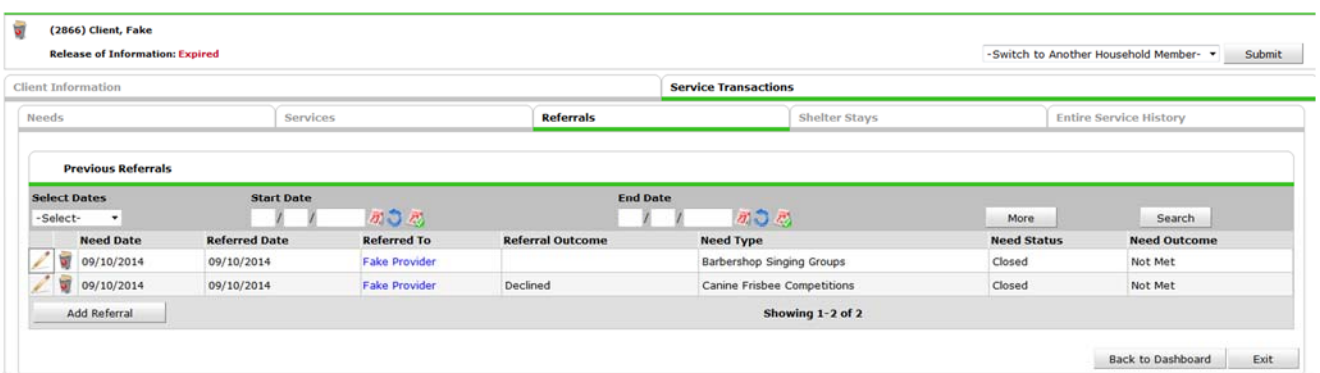
Many agencies and projects participate in the Housing Crisis Hotline. The hotline uses the CallPoint module to record caller (client) information and uses ClientPoint to make referrals to agencies. To check your outstanding referrals, please review the Referrals Report section of the manual. When a client has been referred by the hotline, it is the receiving agency's responsibility to make sure that referral is closed. To do this refer to the following:

First you will need to access the referral in ClientPoint. There is a large tab above the others called Service Transactions. Click on it.

Then click, View Entire Service History.



Next, click on the tab for the Referrals. Find the referral that was made to your project, as there may be multiples. Click on the pencil next to your referral.

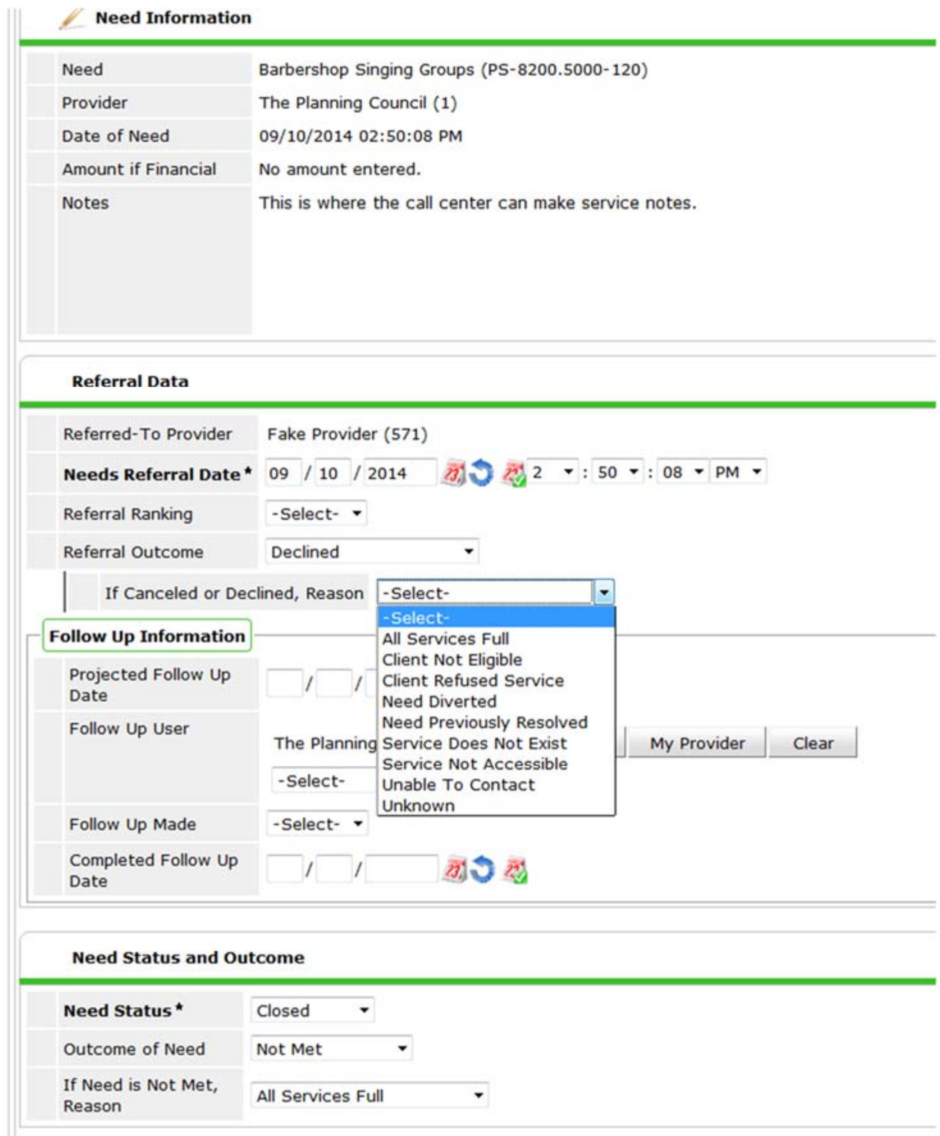


Next you will want to determine if you are Accepting, Accepting on Wait List, Denying, or Canceling the referral. Cancel is used only if the referral is abandoned by the client or if the client was diverted back to housing stability.

If the referral was Denied or Canceled, you will need to fill out the reason for this.

The Need Status needs to be changed to In Progress or Closed, the Outcome of Need needs to be filled and, if necessary, the Not Met Reason needs to be answered.

When all has been completed, Save and Exit.

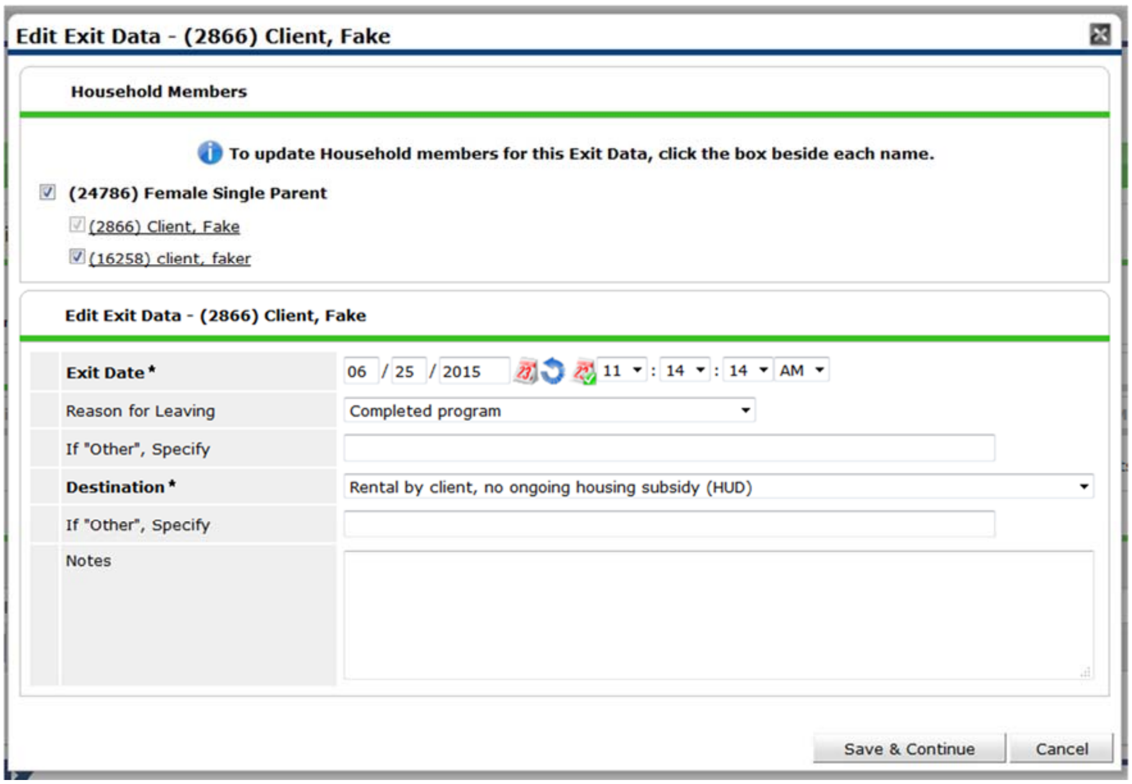


Exit

When the client has completed a project, or is removed for other reasons, they need to exit in HMIS. To do this, first, go in to the client's record. Click on the Entry/Exit tab. Find your entry. There should be a pencil next to the entry date and one next to a blank area. The blank area should be under the heading Exit Date. Click on the pencil next to the blank area under Exit Date.

Here you will enter the Exit Date, the Reason for Leaving, and Destination. All are required regardless of project type.

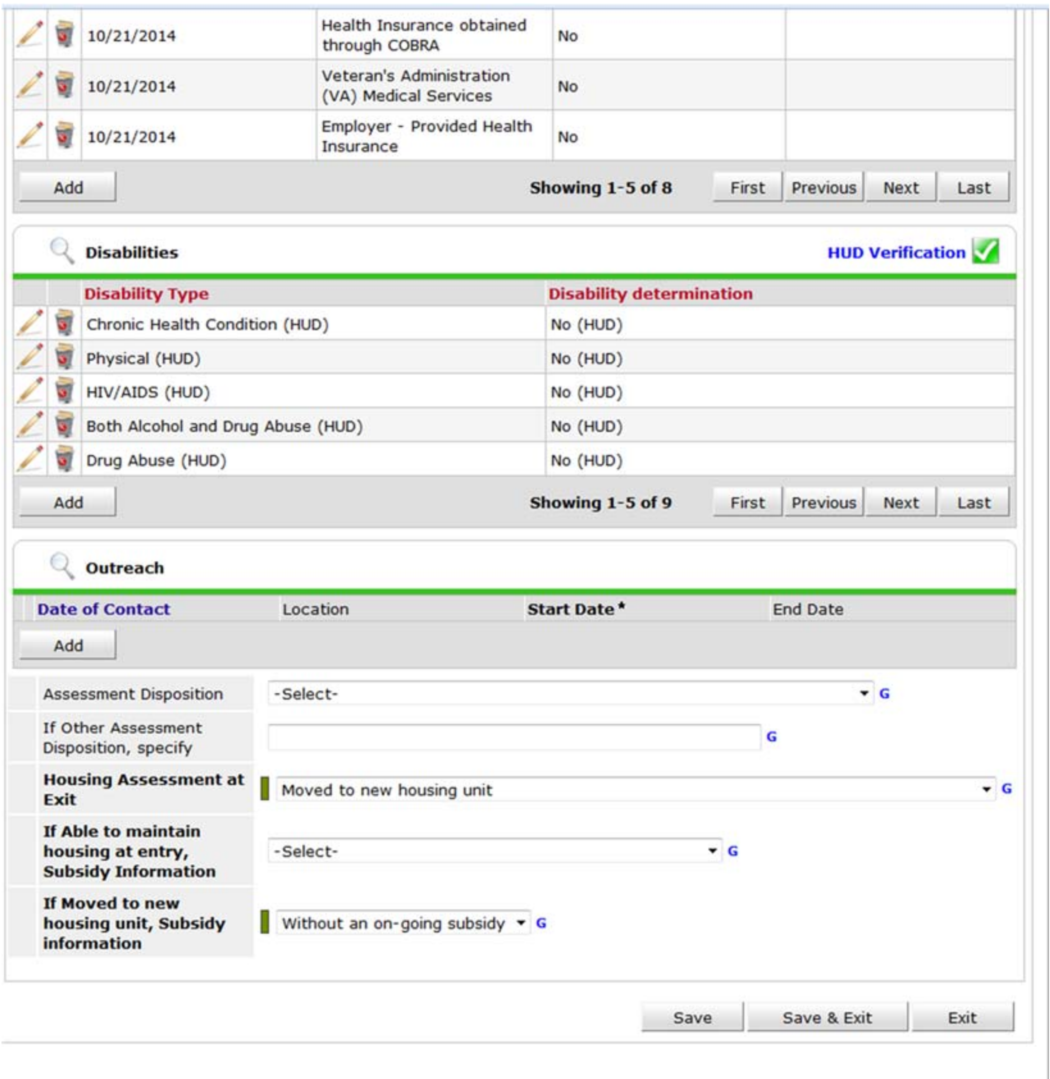
Make sure to exit every client that is supposed to be exited.



Funded agencies, make sure that the sub-assessment data is up to date.

Assessment Disposition is reserved for Coordinated Assessment.

Housing Assessment at Exit and the two subsidy questions is reserved for Rapid Rehousing and Prevention projects.



10/21/2014	Health Insurance obtained through COBRA	No	
10/21/2014	Veteran's Administration (VA) Medical Services	No	
10/21/2014	Employer - Provided Health Insurance	No	

Add   **Showing 1-5 of 8**   First   Previous   Next   Last

Disabilities   **HUD Verification**

Disability Type	Disability determination
Chronic Health Condition (HUD)	No (HUD)
Physical (HUD)	No (HUD)
HIV/AIDS (HUD)	No (HUD)
Both Alcohol and Drug Abuse (HUD)	No (HUD)
Drug Abuse (HUD)	No (HUD)

Add   **Showing 1-5 of 9**   First   Previous   Next   Last

Outreach

Date of Contact	Location	Start Date *	End Date

Add

Assessment Disposition	-Select- G
If Other Assessment Disposition, specify	G
Housing Assessment at Exit	Moved to new housing unit G
If Able to maintain housing at entry, Subsidy Information	-Select- G
If Moved to new housing unit, Subsidy information	Without an on-going subsidy G

Save   Save & Exit   Exit