



HMIS Reference Manual

THE PLANNING COUNCIL

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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.

SERVICEpoint®
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The Planning Council
The Planning Council
June 24, 2015

Home > Home Page Dashboard

Last Viewed **Favorites**

Home

ClientPoint

CallPoint

ResourcePoint

ShelterPoint

ActivityPoint

SkanPoint

Reports

Admin

Logout

System News (15)

Date	Headline
06/03/2015	GAP Insurance
01/27/2015	Please Resubmit Any HMIS Repc
01/13/2015	HMIS Report Request Form Add
10/06/2009	Joshuah Cohen
02/18/2009	Lynchburg CoC Administrator
12/21/2007	Client Privacy Statement for HM

Add System News

Customize Home Page Dashboard

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.

Search

Client Search

Please Search the System before adding a New Client.

	First	Middle	Last	Suffix
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name Data Quality	<input type="text" value="-Select-"/>			
Alias	<input type="text"/>			
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>			
Social Security Number Data Quality	<input type="text" value="-Select-"/>			
U.S. Military Veteran?	<input type="text" value="-Select-"/>			
Exact Match	<input type="checkbox"/>			
Search ACTIVE Clients	<input checked="" type="radio"/>			
Search INACTIVE / DELETED Clients	<input type="radio"/>			
Search ALL Clients	<input type="radio"/>			

Client Number

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

Client ID #

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 Search

Please Search the System before adding a New Client.

First

Middle

Last

Suffix

Name

Fake

Client

Name Data Quality

Full Name Reported

Alias

Social Security Number

123 - 98 - 9876

Social Security Number Data Quality

Full SSN Reported (HUD)

U.S. Military Veteran?

No (HUD)

Exact Match

Search ACTIVE Clients

Search INACTIVE / DELETED Clients

Search ALL Clients

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 # 2866

Submit

Client Results

ID	Name ^	Social Security Number	Date of Birth
2866	Client, Fake	123-98-9876	01/01/1985
16258	client, faker		01/01/2003
58482	Client, fakeyest		05/01/2012

Showing 1-3 of 3

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.

Client Profile

Client - (2866) Client, Fake

(2866) Client, Fake

Release of Information: Expired

-Switch to Another Household Member- Submit

Client Information

Summary Client Profile Households ROI Entry / Exit Case Managers Case Plans Measurements Activities Assessments

Client Record

Name Client, Fake

Name Data Quality Full Name Reported

Alias

Social Security 123-98-9876

SSN Data Quality Full SSN Reported (HUD)

U.S. Military Veteran? No (HUD)

Age 30

Issue ID Card

Client Demographics

Date of Birth 01/01/1985

Date of Birth Type Full DOB Reported (HUD)

Gender Female

If Other Gender, specify

Primary Race Black or African American (HUD)

Secondary Race (if any)

Ethnicity Non-Hispanic/Non-Latino (HUD)

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.

on: Expired

Client Profile

Households

Client, Fake

Full Name Reported

123-98-9876

Full SSN Reported (HUD)

U.S. Military Veteran? No (HUD)

Age 30

Client Record

Editing the Client Record Information could affect the Unique ID and the Client Search.

Client Record

Name First Middle Last Suffix

Name Fake Client

Name Data Quality Full Name Reported

Alias

Social Security 123 - 98 - 9876

SSN Data Quality Full SSN Reported (HUD)

U.S. Military Veteran? No (HUD)

Save Cancel

DO NOT EDIT Client Demographics.

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

Client Profile Assessment

No Client Profile Assessment is specified for this Provider

Call Records

	Start Date	Call ID	Call Time	Call Type	Call Status	Follow Up Needed	Call Notes
	09/19/2014	60303	0:02:25			No	
	09/10/2014	59208	0:16:56	Referral	Complete	No	
	03/14/2014	44253	0:35:36			No	

Showing 1-3 of 3

Client Notes

Provider	Note Date	Note Preview	Full Note
NDHS Shelter List/General Program	03/04/2015	New Note	

Add New Client Note Print

Showing 1-1 of 1

File Attachments

Date Added	Name	Description	Type	Provider	Added From
09/10/2014	the more you know.jpg		jpg	The Planning Council	Call Record

Add New File Attachment

Showing 1-1 of 1

Incidents

Start Date	End Date	Incident	Incident Code	Provider	Ban Site	Staff
07/01/2014	08/01/2014	Nonviolent Criminal activity		OTEH General Program	No	

Add New Incident

Showing 1-1 of 1

Exit

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.

Call Records

	Start Date	Call ID	Call Time	Call Type	Call Status	Follow Up Needed	Call Notes
	09/19/2014	60303	0:02:25			No	
	09/10/2014	59208	0:16:56	Referral	Complete	No	
	03/14/2014	44253	0:35:36			No	

Showing 1-3 of 3

Client Notes

Provider	Note Date	Note Preview	Full Note
NDHS Shelter List/General Program	03/04/2015	New Note	

Add New Client Note

Showing 1-1 of 1

Call Notes

9/11 - call checked
Let's make some client notes.
Notes. Notes. 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 screenshot shows a web interface for a client record. At the top, it says "Client - (2866) Client, Fake". Below this, there's a section for "(2866) Client, Fake" with a status "Release of Information: Expired". The main area is titled "Client Information" and has several tabs: "Summary", "Client Profile", "Households" (which is selected and highlighted with a green underline), "ROI", "Entry / Exit", "Case Managers", and "Case Plan". Below the "Households" tab, there's a message: "This Client is not currently a member of any Households." Below this message, there's a section titled "Previous Households" with a green underline. At the bottom of this section, there are two buttons: "Search Existing Households" and "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.

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	faker		Client	
Name Data Quality	-Select-			
Alias				
Social Security Number				
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	<input type="checkbox"/>			

SearchClearAdd New Client With This Information

Client Number

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

Client ID #Submit

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
+ 16258	client, faker		01/01/2003		Male		0

Showing 1-1 of 1

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
2866	Client, Fake	123-98-9876	01/01/1985		Female		0

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.

Household Information - (24786) Female Single Parent

(24786) Female Single Parent

Save

Save & Exit

Exit

Household Type *

Female Single Parent

Income

US\$1,323.00 monthly (US\$15,876.00 annual)

Client Count

2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(16258) client, faker	12	No	Daughter	06 / 24 / 2010	0	1
(2866) Client, Fake	30	Yes	Self	06 / 24 / 2010	0	1

Add/Delete Household Members

Household History Report

Previous Household Members

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.

Release of Information

Release of Information - (2866) Client, Fake

Household Members

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

☒ (24786) Female Single Parent

☒ (2866) Client, Fake

☒ (16258) client, faker

Release of Information Data

Provider *	The Planning Council (1)	Search	My Provider	Clear
Release Granted *	Yes			
Start Date *	06 / 24 / 2015			
End Date *	06 / 24 / 2018			
Documentation	Signed Statement from Client			
Witness				

Save Release of Information Cancel

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.

Entry Data - (2866) Client, Fake

Household Members

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

☒ (24786) Female Single Parent

☒ (2866) Client, Fake

☒ (16258) client, faker

Entry Data - (2866) Client, Fake

Provider*	The Planning Council (1)	Search	My Provider	Clear
Type*	HUD			
Entry Date*	06 / 24 / 2015 11 : 07 : 32 AM			

Save & Continue Cancel

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.

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider *

The Planning Council (1)

Search

My Provider

Clear

Type *

HUD

Update

Household Members Associated with this Entry / Exit

	Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(2866) Client, Fake	Yes	06/24/2015						
	(16258) client, faker	No	06/24/2015						

Include Additional Household Members

Showing 1-2 of 2

Entry Assessment

Household Members

☒ (2866) Client, Fake

Age: 30

Veteran: No (HUD)

☒ (16258) client, faker

Age: 12

Veteran: Unknown

HUD CoC and ESG Entry

Entry Date: 06/24/2015 11:07:32 AM

City of Origin:

Lynchburg

Lookup

Clear

G

Date of Birth

01 / 01 / 1985

G

Date of Birth Type

Full DOB Reported (HUD)

G

Primary Race

Black or African American (HUD)

G

Secondary Race (if any)

-Select-

G

Ethnicity

Non-Hispanic/Non-Latino (HUD)

G

Gender

Female

G

If Other Gender, specify

G

Does the client have a disabling condition?

Yes (HUD)

G

Residence Prior to Project Entry

Staying or living in a family member's room, apartment or house (HUD)

G

If Other Type of Residence, specify

G

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 Receiving Income Source question is set to Yes. The Start Date will auto populate with the Entry Date; this is acceptable.

The screenshot shows a software window titled "Add Recordset - (2866) Client, Fake". Inside, the "Monthly Income" tab is selected. The form contains the following fields:

- Monthly Amount:** A text box with the value "234" and a green "G" icon.
- Source of Income:** A dropdown menu showing "Child Support (HUD)" with a green "G" icon.
- If Other, Please Specify:** A large empty text area with a green "G" icon.
- Receiving Income Source?:** A dropdown menu showing "Yes" with a green "G" icon.
- Start Date:** A date field showing "06 / 25 / 2015" with a green "G" icon and a refresh button.
- End Date:** An empty date field with a green "G" icon and a refresh button.
- Note on Income:** A large empty text area with a green "G" icon.

At the bottom are three buttons: "Save", "Save and Add Another", and "Cancel".

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).

The screenshot shows the same software window, but with the "Non-Cash Benefits" tab selected. The form contains the following fields:

- Amount of Non-Cash Benefit:** A text box with the value "214" and a green "G" icon.
- Source of Non-Cash Benefit:** A dropdown menu showing "Supplemental Nutrition Assistance Program (Food Stamps) (HUD)" with a green "G" icon.
- If Other, Please Specify:** A large empty text area with a green "G" icon.
- Receiving Benefit?:** A dropdown menu showing "Yes" with a green "G" icon.
- Start Date:** A date field showing "06 / 25 / 2015" with a green "G" icon and a refresh button.
- End Date:** An empty date field with a green "G" icon and a refresh button.











At the bottom are three buttons: "Save", "Save and Add Another", and "Cancel".

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.

Add Recordset - (2866) Client, Fake

Health Insurance

Start Date *	06 / 25 / 2015	  
Health Insurance Type	MEDICARE	
Covered?	Yes	
(HOPWA) If Private Pay Insurance, Specify	<div></div> 	
(HOPWA) If No, Reason not covered	- Select -	
End Date		  

Save

Save and Add Another

Cancel

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.

Add Recordset - (2866) Client, Fake	
Disabilities	
Disability Type	Alcohol Abuse (HUD) G
Disability determination	Yes (HUD) G
If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	Yes (HUD) G
If Yes, Documentation of the disability and severity on file	No G
If Yes for Mental Health Problem, Alcohol Abuse, Drug Abuse, or Both Alcohol and Drug Abuse, How confirmed (PATH only)	-Select- G
If Yes for Mental Health Problem (PATH only) Serious mental illness (SMI) and, if SMI, how confirmed	-Select- G
(If yes)Currently receiving services or treatment?	No (HUD) G
Start Date *	06 / 25 / 2015 G
Note on Disability	<div></div> G
Above condition is going to be long term?	Yes G
End Date (if any)	/ / G
<div>Save Save and Add Another Cancel</div>	

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.

(2866) Client, Fake
Release of Information: Expired

Client Information | Service Transactions

Service Transaction Dashboard

- Add Need
- Add Service
- Add Multiple Services
- Add Referrals
- View Previous Service Transactions
- View Shelter Stays
- 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.

(2866) Client, Fake
Release of Information: Expired

Client Information | Service Transactions

Needs | Services | **Referrals** | Shelter Stays | Entire Service History

Previous Referrals

Select Dates	Start Date	End Date				
-Select-						
Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
09/10/2014	09/10/2014	Fake Provider		Barbershop Singing Groups	Closed	Not Met
09/10/2014	09/10/2014	Fake Provider	Declined	Canine Frisbee Competitions	Closed	Not Met

Add Referral

Showing 1-2 of 2

Back to Dashboard | Exit

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.

Need Information	
Need	Barbershop Singing Groups (PS-8200.5000-120)
Provider	The Planning Council (1)
Date of Need	09/10/2014 02:50:08 PM
Amount if Financial	No amount entered.
Notes	This is where the call center can make service notes.

Referral Data	
Referred-To Provider	Fake Provider (571)
Needs Referral Date *	09 / 10 / 2014 2 : 50 : 08 PM
Referral Ranking	-Select-
Referral Outcome	Declined
If Canceled or Declined, Reason	-Select-

Follow Up Information	
Projected Follow Up Date	/ /
Follow Up User	The Planning Council
Follow Up Made	-Select-
Completed Follow Up Date	/ /

Need Status and Outcome	
Need Status *	Closed
Outcome of Need	Not Met
If Need is Not Met, Reason	All Services Full

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.

Edit Exit Data - (2866) Client, Fake

Household Members

To update Household members for this Exit Data, click the box beside each name.

- ☒ **(24786) Female Single Parent**
 - ☒ (2866) Client, Fake
 - ☒ (16258) client, faker

Edit Exit Data - (2866) Client, Fake

Exit Date *	06 / 25 / 2015 11 : 14 : 14 AM
Reason for Leaving	Completed program
If "Other", Specify	
Destination *	Rental by client, no ongoing housing subsidy (HUD)
If "Other", Specify	
Notes	

Save & Continue Cancel

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	
<input type="button" value="Add"/>		Showing 1-5 of 8		<input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="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)
<input type="button" value="Add"/>		Showing 1-5 of 9

Outreach

Date of Contact	Location	Start Date *	End Date
<input type="button" value="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