

HMIS Training

DC 101: SINGLES ENTRY EXIT WORKFLOW

Agenda

- HMIS Basics Recap
- Introduction to ClientPoint
- The Entry/Exit Workflow
- What does entry mean for my project type?
- Creating a new client
- Completing Client Profile information
- Creating an entry
- Entry Assessment
- Updates and Annual Reviews
- Exiting a client
- Common Data Entry Errors
- Additional Resources

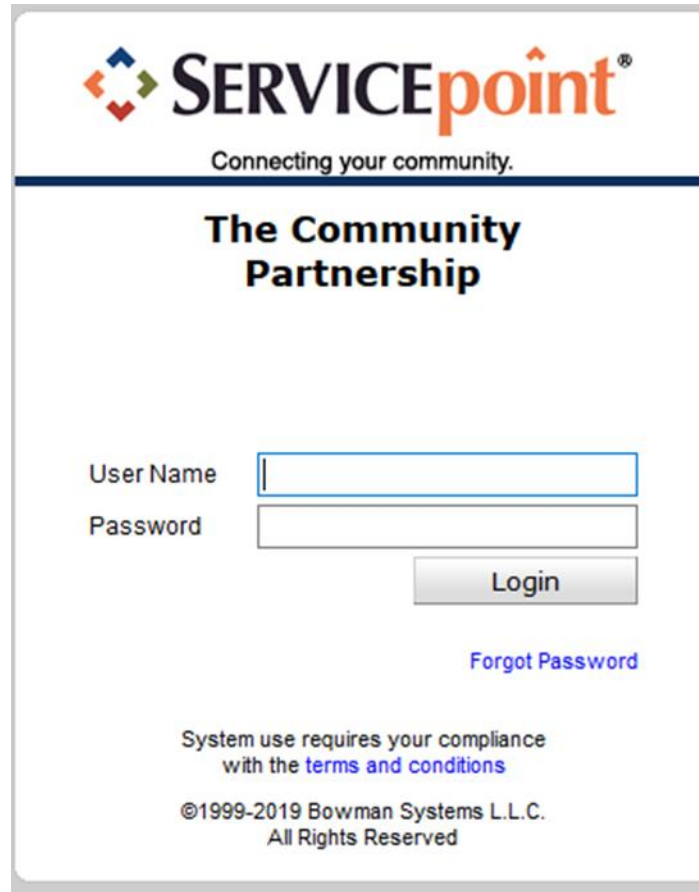
HMIS Basics Recap

- DC's HMIS
- Visibility Basics
- Data Security

What is HMIS?

- Homeless Management Information System
- Tool required by funders of homeless services providers
- Way to keep track of services, case plans, assessments, and housing for clients
- Way for community to learn of system flow and cracks in our homeless response system
- This is all thanks to YOU for completing accurate and timely data entry for the clients you serve!

ServicePoint – DC's HMIS Software



The screenshot shows the ServicePoint login page. At the top is the ServicePoint logo with the tagline "Connecting your community." Below this is the text "The Community Partnership". The login section includes a "User Name" label next to a text input field, a "Password" label next to a password input field, and a "Login" button. A link for "Forgot Password" is located below the login button. At the bottom, there is a disclaimer: "System use requires your compliance with the [terms and conditions](#)" and a copyright notice: "©1999-2019 Bowman Systems L.L.C. All Rights Reserved".

SERVICEpoint®
Connecting your community.

The Community Partnership

User Name

Password

Login

[Forgot Password](#)

System use requires your compliance
with the [terms and conditions](#)

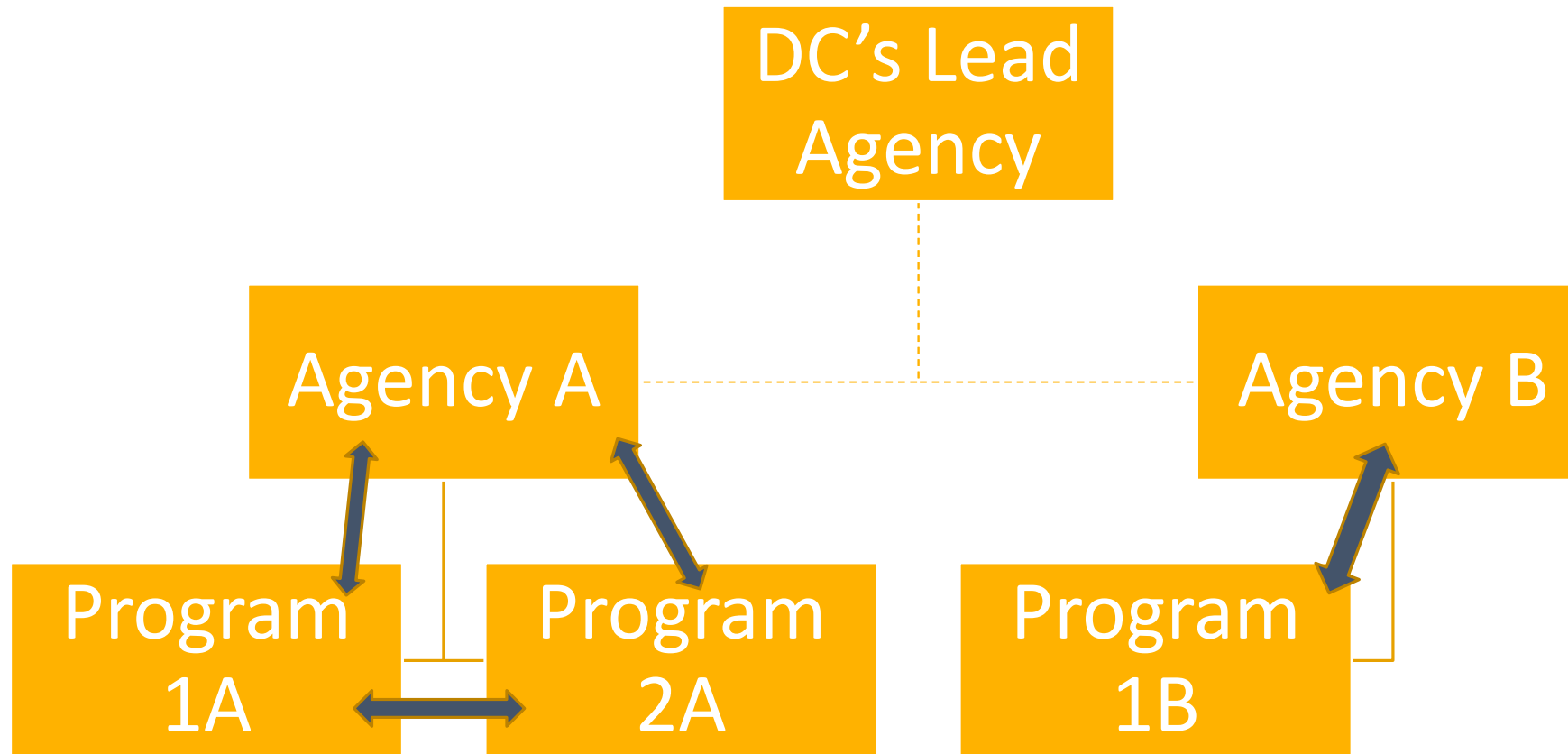
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Who Can See What?

Visibility and Data Security

- The database contains hundreds of thousand client files, each with dozens of project stays, services, and case notes.
- Having a visibility structure is important to ensure client information is protected, while also ensuring agencies and programs are able to work together to help clients.
- Client choice to share their program level information is at the heart of our visibility structure.

Visibility Basics – Current Structure



HUD UDEs – What's Shared & What Isn't

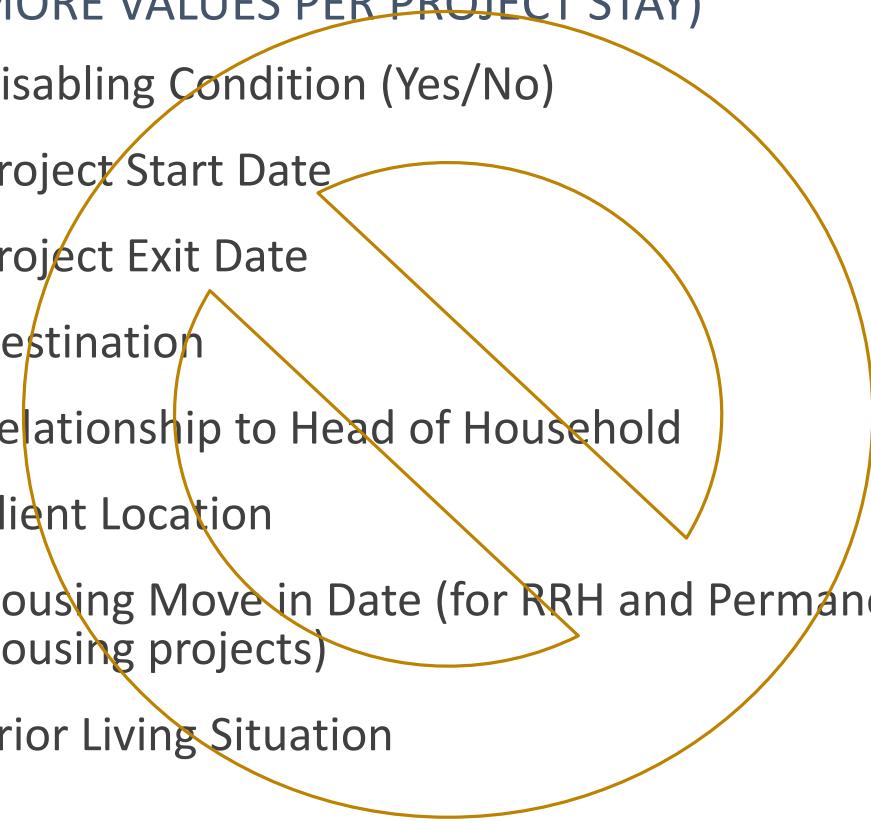
UNIVERSAL IDENTIFIERS (ONE ANSWER PER CLIENT RECORD)

- Name
- Name Data Quality
- Social Security Number
- Social Security Number Data Quality
- Date of Birth
- Date of Birth Data Quality
- Race
- Ethnicity
- Gender
- Veteran Status



UNIVERSAL PROJECT STAY ELEMENTS (ONE OR MORE VALUES PER PROJECT STAY)

- Disabling Condition (Yes/No)
- Project Start Date
- Project Exit Date
- Destination
- Relationship to Head of Household
- Client Location
- Housing Move in Date (for RRH and Permanent Housing projects)
- Prior Living Situation



Family Shelter, Outreach, and Prevention

- This is a group of programs that are sharing client program data amongst themselves
 - Release of information (ROI) signed at Virginia Williams allows this to happen.
- ALL Client data created by these programs are shared with the other programs
 - AS LONG AS the information is tagged as coming from one of the following programs.
 - If it is coming from a different program (even within an Agency that has one of those programs) it will not be shared per the agreement of the ROI.
- Temporary Shelters for Families
- Overflow motels/hotels for Families
- Virginia Williams
- Homeless Prevention Programs for Families
- Short Term Family Shelters

CAHP Data Sharing

- This is a group of programs that are sharing client CAHP data amongst themselves
 - Release of information (ROI) signed at beginning of CAHP assessment process
- “Agency Name/Acronym - Coordinated Entry for ADULT Single Individuals”
- “Agency Name/Acronym - Coordinated Entry for YOUTH Single Individuals”
- ALL Client data created by these programs are shared with the other programs
 - AS LONG AS the information is tagged as coming from one of the following programs.
 - If it is coming from a different program (even within an Agency that has one of those programs) it will not be shared per the agreement of the ROI.

Coming Soon: Universal ROIs

- There is not currently a standard ROI for the CoC but that is being worked on.
- Once more information is available we will update you all on this new document and the processes involved.

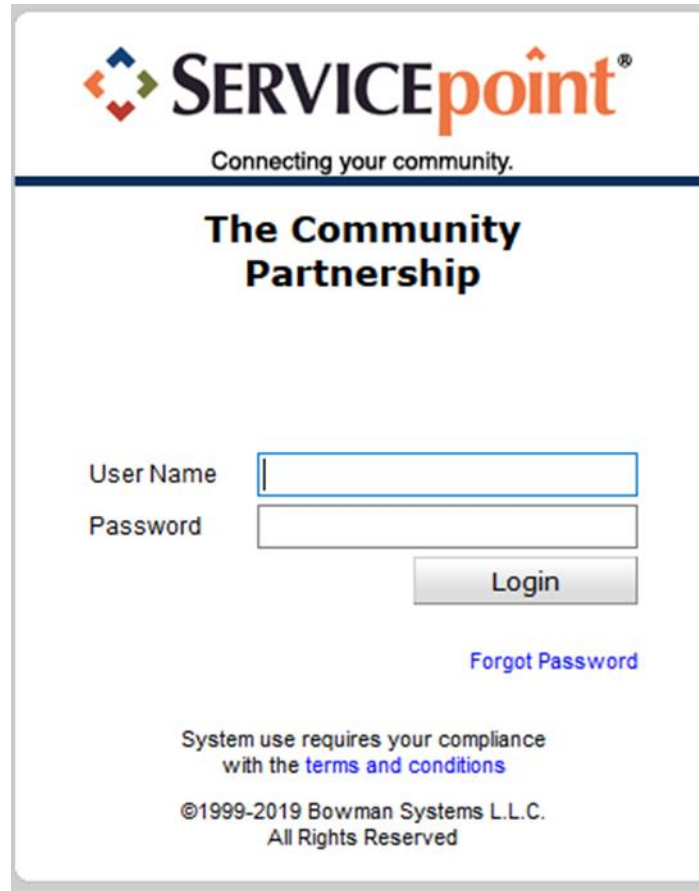
Data Security

- Keeping client information safe and secure begins with YOU!
- Do not let others log in as you.
 - Keep your user name and password to yourself.
 - Do not keep it posted anywhere others can see
- Do not leave your computer unattended while logged into ServicePoint.
- Do not save your login information with your web browser.
- Do not send client identifying information via unencrypted emails (including to the helpdesk!)
 - Client Identifying information includes:
 - Name
 - Date of Birth
 - Social Security Number

Logging In

Training site:

https://sp5.servicept.com/washdc_demo/



The screenshot shows the SERVICEpoint login interface. At the top is the SERVICEpoint logo with the tagline "Connecting your community." Below this is a header for "The Community Partnership". The login section contains two input fields: "User Name" and "Password". A "Login" button is positioned below the password field. A link for "Forgot Password" is located below the login button. At the bottom, a disclaimer states: "System use requires your compliance with the terms and conditions" followed by the copyright notice "©1999-2019 Bowman Systems L.L.C. All Rights Reserved".

Live site:

<https://washdc.servicept.com>

Logging In

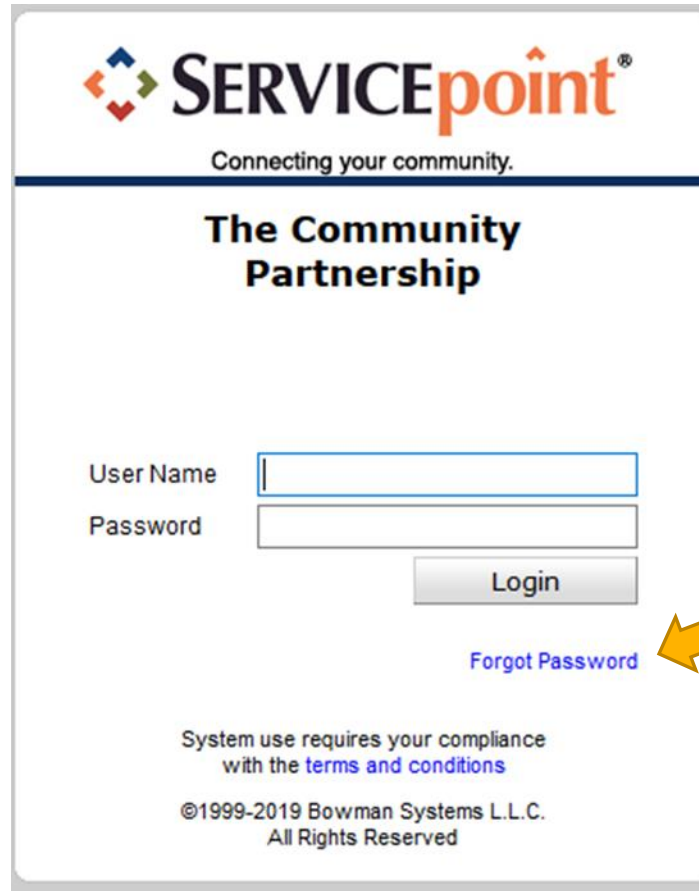
Training site:

https://sp5.servicept.com/washdc_demo/

Live site:

<https://washdc.servicept.com>

Forgot your password?



SERVICEpoint[®]
Connecting your community.

The Community Partnership

User Name

Password

Login

[Forgot Password](#)

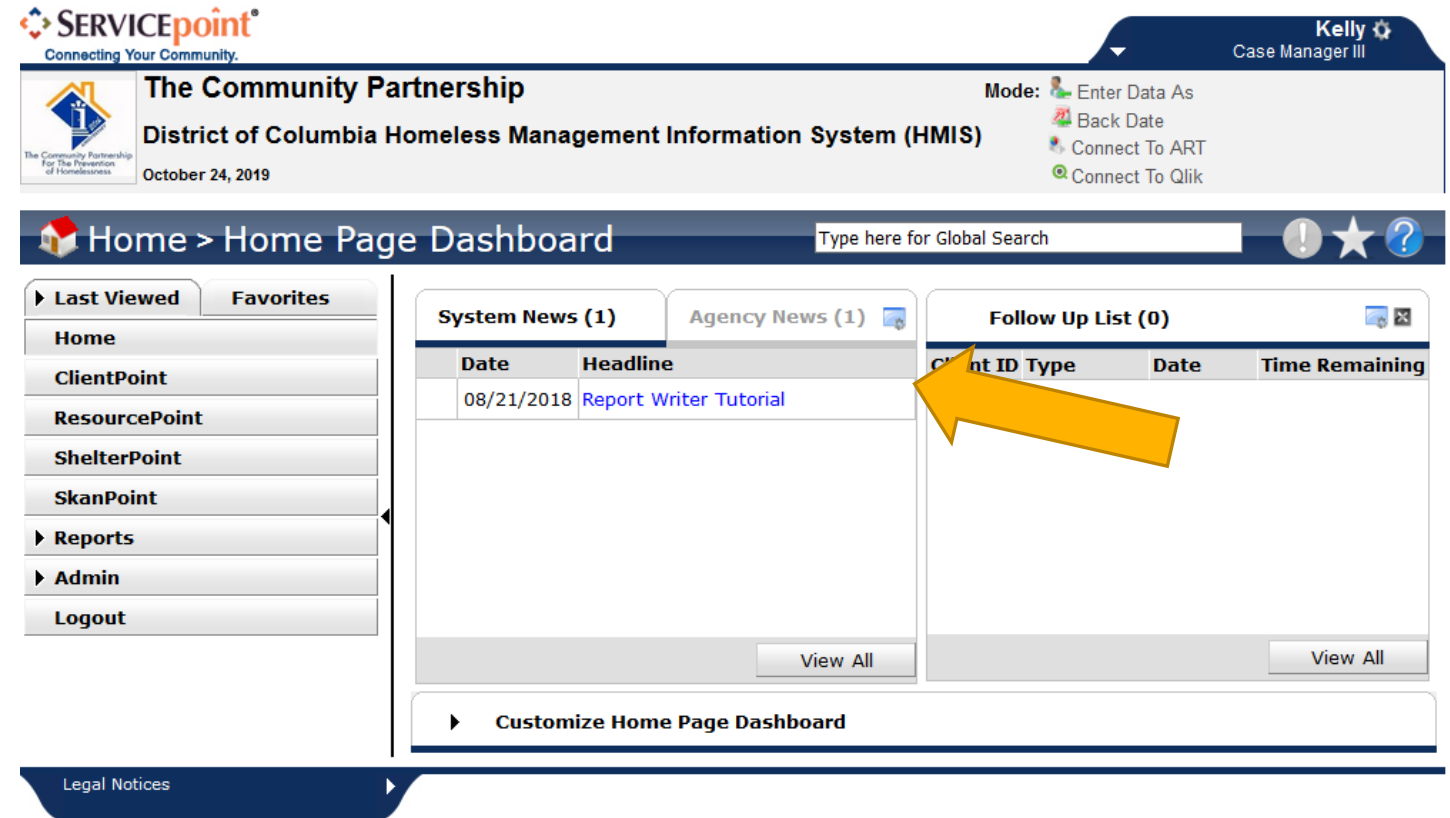
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Click here!

System News

- We are using System News to alert Users to changes in the system, as well as scheduled system down time.
- We will also be populating it with other resources so stay tuned...



SERVICEpoint
Connecting Your Community.

The Community Partnership
District of Columbia Homeless Management Information System (HMIS)
October 24, 2019

Mode: Enter Data As, Back Date, Connect To ART, Connect To Qlik

Kelly Case Manager III

Home > Home Page Dashboard

Type here for Global Search

System News (1)

Date	Headline
08/21/2018	Report Writer Tutorial

[View All](#)

Follow Up List (0)

Client ID	Type	Date	Time Remaining
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[View All](#)

[Customize Home Page Dashboard](#)

Legal Notices

What is Enter Data As?



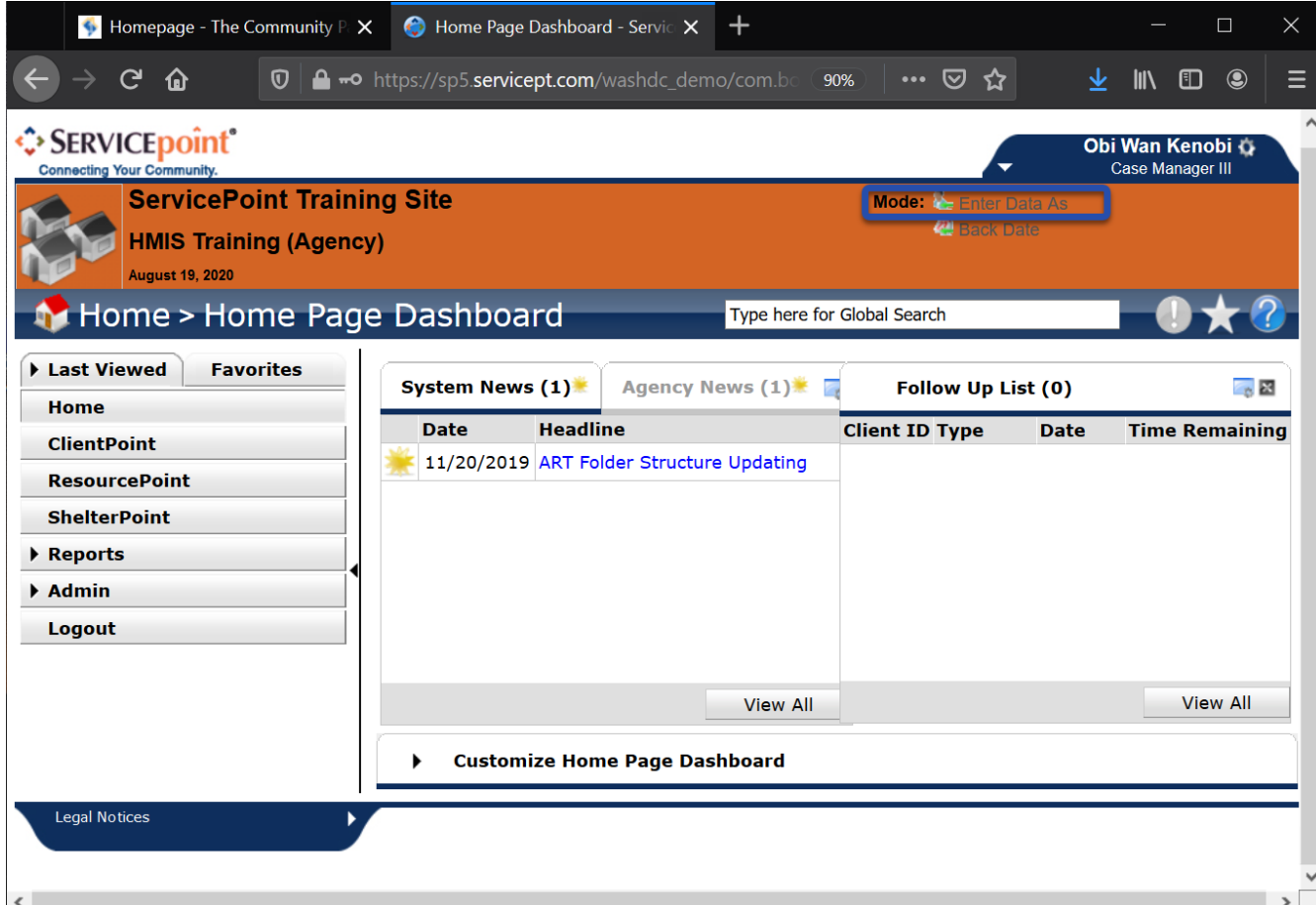
- Most agencies have multiple programs that they operate. These often are in different buildings.
- Using Enter Data As is like physically going from one program to another but within the Database.

Why use Enter Data As?

- Allows for you to see what is shared with individual programs.
- Allows others to see data from your shelter/prevention/outreach program
- You no longer have to manually change your provider in your
 - Entry/exits
 - Goals
 - Case plans
 - Case notes
 - Case managers
 - Services
 - File attachments

How to Enter Data As – Step 1

- When you log into HMIS, go to the top right corner and click on the Enter Data As button



The screenshot shows the ServicePoint Training Site HMIS Training (Agency) dashboard. The user is logged in as Obi Wan Kenobi, Case Manager III. The 'Enter Data As' button is highlighted in the top right corner. The dashboard includes a sidebar with navigation links (Home, ClientPoint, ResourcePoint, ShelterPoint, Reports, Admin, Logout) and a main content area with System News, Agency News, and a Follow Up List. The 'Enter Data As' button is located in the top right corner of the dashboard, next to the 'Back Date' button.

How to Enter Data As – Step 2

Enter Data As Provider Search

Provider Search

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

Search

Show Advanced Options

Search

Clear

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	R	S	T	U	V	W	X	Y	Z	All
	Provider					Level		Phone		Location		Last Updated															
+	HMIS Training - Low Barrier - LBS ES IND - TCP Direct (2328)					Level 3		Unknown		Unknown		08/12/2020															
+	HMIS Training - Permanent Housing - PSH FAM Youth - TCP Direct (2329)					Level 3		Unknown		Unknown		08/12/2020															
+	HMIS Training - Rapid Rehousing - RRH IND - TCP Direct (2327)					Level 3		Unknown		Unknown		08/12/2020															
+	HMIS Training - Transitional Housing - TH FAM - TCP Direct (1064)					Level 3		Unknown		Unknown		08/12/2020															

Showing 1-4 of 4

Exit

- Find the program you are going to be doing data entry as.
 - You can search in the search box
 - You can type in the provider id
 - You can look through the list of options for the correct provider

10/1/2020

[HTTP://WWW.COMMUNITY-PARTNERSHIP.ORG/](http://www.community-partnership.org/)

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How to Enter Data As – Step 3

- When you find the correct program, click the green plus sign.

Enter Data As Provider Search

Provider Search

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

Search

Show Advanced Options

Search

Clear

Provider Number

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

Provider ID #

Submit

Provider Search Results

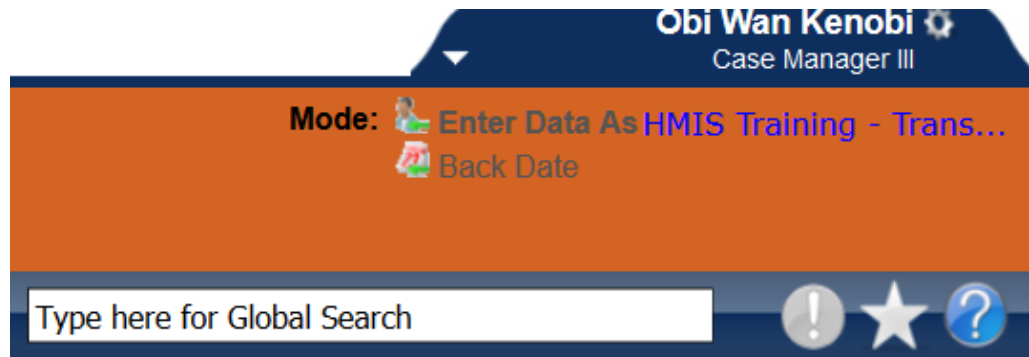
#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
	Provider														Level	Phone	Location	Last Updated									
		HMIS Training - Low Barrier - LBS ES IND - TCP Direct (2328)														Level 3	Unknown	Unknown	08/12/2020								
		HMIS Training - Permanent Housing - PSH FAM Youth - TCP Direct (2329)														Level 3	Unknown	Unknown	08/12/2020								
		HMIS Training - Rapid Rehousing - RRRH IND - TCP Direct (2327)														Level 3	Unknown	Unknown	08/12/2020								
		HMIS Training - Transitional Housing - TH FAM - TCP Direct (1064)														Level 3	Unknown	Unknown	08/12/2020								

Showing 1-4 of 4

Exit

How to Enter Data As – Step 4

- When you click the green plus sign, the name of the provider you will be doing data entry as will appear next to Enter Data As.
- To remove the EDA click on the name of the provider (blue text).




Demo

End


ff

Introduction to ClientPoint


- ClientPoint is used by most Agencies in order to document program stays, case plans, services provided, and case managers.
- The primary method of tracking program stays in ClientPoint is Entry/Exits.







Connecting Your Community.



The Community Partnership
District of Columbia Homeless Management Information System (HMIS)
October 24, 2019

Kelly 
Case Manager III

Mode:

-  Enter Data As
-  Back Date
-  Connect To ART
-  Connect To Qlik

 **Home > Home Page Dashboard**

Type here for Global Search   

► **Last Viewed** **Favorites**

- Home
-  **ClientPoint**
- ResourcePoint
- ShelterPoint
- SkanPoint
- Reports
- Admin
- Logout

System News (1)

Date	Headline
08/21/2018	Report Writer Tutorial

[View All](#)

Agency News (1) 

Follow Up List (0)  

Client ID	Type	Date	Time Remaining
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[View All](#)

► **Customize Home Page Dashboard**

Legal Notices ►

The Entry/Exit Workflow

- Tracking clients served by a given provider using Program Entry Date and Program Exit is an Entry/Exit Workflow.
- Programs contributing data to the DC HMIS that use an Entry/Exit Workflow include:
 - Emergency and Temporary Shelters for Families;
 - Temporary Shelters for Singles;
 - Transitional Housing Programs for Families and Singles;
 - Permanent Supportive Housing Programs for Families and Singles; and
 - Rapid Rehousing Programs for Families and Singles.
- If you are unsure which program type you operate, please contact the HMIS Helpdesk.

What does Entry mean for my project type?

- **Street Outreach:**

- Date of first contact with the client

- **Emergency Shelter:**

- Night the client first stayed in shelter

- **Transitional Housing:**

- Date the client moves into the residential project (first night in residence)

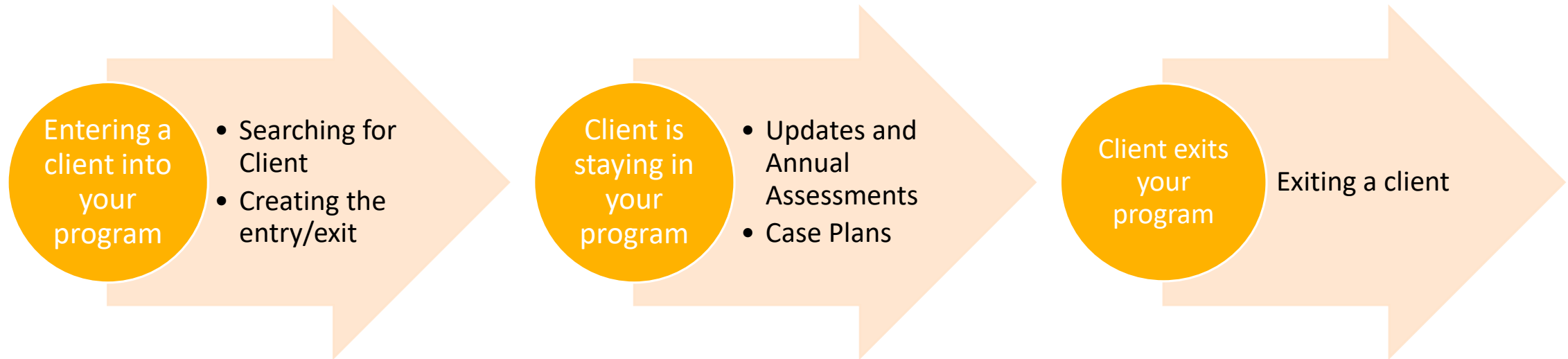
- **Permanent Housing including Rapid Re-housing:**

- Date client was admitted into project
- To be admitted indicates the following factors have been met:
 - Information provided by the client or from the referral indicates they meet the criteria for admission
 - The client has indicated they want to be housed in this project
 - The client is able to access services and housing through the project. The expectation is the project has a housing opening or expects to have on in a reasonably short amount of time

- **Supportive Services Only, Day Shelters, Homelessness Prevention, Coordinated Entry:**

- Date the client first began working with the project and generally received the first provision of service.

The Entry/Exit Workflow




Section 1: Entering a Client into your Program


Part 1: Searching for a Client




- You will need to search for a client in order to add the client to your program
- You can search for the client by name, or if you know the client's ID #, you can use that.



Client Search

 Please Search the System before adding a New Client.

 Items in *Italics* are for Data Entry ONLY and will not be used for Search Results.

Name	First <input type="text"/>	Middle <input type="text"/>	Last <input type="text"/>	Suffix <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"/>			
<i>Social Security Number Data Quality</i>	<input type="text" value="-Select-"/>			
<i>U.S. Military Veteran?</i>	<input type="text" value="-Select-"/>			
Exact Match	<input type="checkbox"/>			
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>   			
DOB Data Quality	<input type="text" value="-Select-"/>			
Gender	<input type="text" value="-Select-"/>			
Primary Race	<input type="text" value="-Select-"/>			
Secondary Race	<input type="text" value="-Select-"/>			
Ethnicity	<input type="text" value="-Select-"/>			

Client Number

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


Client ID #


Creating a new client file




- If you do not find a client record for the client you are serving, you will need to create a new client record.
- This is done from the Search box in ClientPoint.



Client Search

 Please Search the System before adding a New Client.

 *Items in Italics are for Data Entry ONLY and will not be used for Search Results.*

Name	First Mulan	Middle 	Last Fa	Suffix
Name Data Quality	Full Name Reported			
Alias				
Social Security Number	845	- 54	- 6321	
Social Security Number Data Quality	Full SSN Reported (HUD)			
U.S. Military Veteran?	Yes (HUD)			
Exact Match				<input type="checkbox"/>
Date of Birth	11	/ 03	/ 1983	  
DOB Data Quality	Full DOB Reported (HUD)			
Gender	Female			
Primary Race	Asian (HUD)			
Secondary Race	-Select-			
Ethnicity	Non-Hispanic/Non-Latino (HUD)			

Client Number

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

Client ID #

Section 1: Entering a Client into your Program

Completing the Client Profile Information

- Once in the Client record in ClientPoint, navigate to the Client Profile.
- If there is any missing or incorrect information in the Client Record or Client Demographic sections, click the corresponding Edit Pencil(s) to make the necessary changes.



Client - (9) Solo, Han

Mass Visibility Update

(9) Solo, Han

Release of Information: **None**

-Switch to Another Household Member-

Submit

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans


Measurements

Assessments

Client Record

Issue ID Card


Name	Solo, Han
Name Data Quality	Full Name Reported
Alias	Scruffy Nerf Herder
Social Security	202-20-2020
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	Yes (HUD)
Age	25



Change

Clear

Client Demographics




Date of Birth	05/02/1994
Date of Birth Type	Full DOB Reported (HUD)
Gender	Male
Primary Race	White (HUD)
Secondary Race	
Ethnicity	Non-Hispanic/Non-Latino (HUD)

Save

Save & Exit

Exit

Low Barrier Shelter, Street Outreach, and Meal Programs (2017)



Demo

End

ff



- To document the client's participation in the program, you need to create an Entry.
- Navigate to the Entry/Exit Tab.

Client - (9) Solo, Han Mass Visibility Update


(9) Solo, Han
Release of Information: **None** -Switch to Another Household Member- Submit

Client Information Service Transactions

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

Added to the system 02/23/2001 02:45 PM

Name	Solo, Han	Gender	Male
Date of Birth	05/02/1994 (Age 25)	Primary Race	White (HUD)
Social Security	202-20-2020	Secondary Race	
		U.S. Military Veteran?	Yes (HUD)



Section 1: Entering a Client into your Program

Part 2: Creating an Entry



Client Information | Service Transactions

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

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
District of Columbia Homeless Management Information System (HMIS) (2)	HUD	10/11/2019				
Catholic Charities - Coordinated Entry for FAMILIES (1907)	HUD	10/10/2019				
CCDC - Coordinated Entry for ADULT Single Individuals OUD (2074)	HUD	10/02/2019				

Add Entry / Exit

Showing 1-3 of 3

- Click “Add Entry/Exit”
- Choose the correct Type
- Set the Project Start Date
- Click Save & Continue

Project Start Data - (9) Solo, Han

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.

☐ (48241) Two Parent Family

☐ (1) Client, Example

☒ (9) Solo, Han

Project Start Data - (9) Solo, Han

Provider* HMIS Training (Program) (1064) Search My Provider Clear

Type* HUD

Project Start Date* 10 / 28 / 2019 2 : 45 : 52 PM











Save & Continue Cancel

Section 1: Entering a Client into your Program








Part 3: The Entry Assessment

- The Entry Assessment captures the universal data elements requested by the Federal Partners and DC CoC as well as any program specific data elements required for your agency's funding source.
- Street Outreach, Emergency Shelters, and Safe Havens have a different set of assessments than all other project types. This is due to the way HUD captures Previous Living Situation information.
- Most programs (Non SO, ES, or SH) have the **HUD CoC & ESG Entry All Other Projects (2020) TCP** assessment. This is the required assessment for all HUD CoC and DHS funded programs.

UNIVERSAL DATA ELEMENTS (UDEs)

Date of Birth	05 / 02 / 1994    G
Date of Birth Type	Full DOB Reported (HUD)  G
Gender	Male  G
Primary Race	White (HUD)  G
Secondary Race	-Select-  G
Ethnicity	Non-Hispanic/Non-Latino (HUD)  G
Relationship to Head of Household	Self (head of household)  G
Client Location	DC-500  G

Chronic Homelessness Determination

Does the client have a disabling condition?	Yes (HUD)  G
Prior Living Situation	Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)  G
Length of Stay in Previous Place	One month or more, but less than 90 days  G
Approximate date homelessness started:	04 / 01 / 2017    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	One time (HUD)  G
Total number of months homeless on the street, in ES or SH in the past three years	2  G



VETERAN INFORMATION

Veteran Information

Year entered military service *

Year separated from military
service

Branch of the Military

Discharge Status




Add

- Anyone for whom you answer 'yes' to the question **U.S. Military Veteran**, you must also complete the Veteran Information sub-assessment.
- Make sure to confirm or deny each of the different war eras.

Add Recordset - (9) Solo, Han

Veteran Information

Year entered military
service

10 / 27 / 2019    G

Year separated from
military service

/ /    G

World War II

-Select-  G

Korean War

-Select-  G

Vietnam War

-Select-  G

Persian Gulf War

-Select-  G

Afghanistan

-Select-  G

Iraq Freedom

-Select-  G

Iraq Dawn

-Select-  G

Other Peace-keeping
Operations or Military
Interventions

-Select-  G

Branch of the Military

-Select-  G

Discharge Status

-Select-  G

Save

Save and Add Another

Cancel

CoC-SPECIFIC DATA ELEMENTS

Are you engaged with case management?	<input type="text" value="Yes"/> G
Homelessness Primary Reason	<input type="text" value="Co-occurring (Mental Health and Substance Use)"/> G
Sexual Orientation	<input type="text" value="-Select-"/> G
If Other, please describe	<input type="text"/> G
Have you ever been in foster care?	<input type="text" value="No"/> G
Have you ever resided in an institutional setting?	<input type="text" value="No (HUD)"/> G

Client Contact Information - Adults Only

Client Email Address (Optional But Encouraged)	<input type="text"/> G
Whose email address is this?	<input type="text" value="-Select-"/> G
Client Phone Number (Optional But Encouraged)	<input type="text"/> G
Whose phone number is this?	<input type="text" value="-Select-"/> G

Client Identification Information

Does the client have their birth certificate?	<input type="text" value="-Select-"/> G
Does the client have their social security card?	<input type="text" value="-Select-"/> G
Does the client have their state-issued ID?	<input type="text" value="-Select-"/> G

Client Education Information

Is the client currently in school?	<input type="text" value="No (HUD)"/> G
Received Vocational Training?	<input type="text" value="No (HUD)"/> G
Last Grade Completed (HUD)	<input type="text" value="-Select-"/> G

Language Access Questions


Is the client Limited English (LEP) or Non-English (NEP) Proficient?	<input type="text" value="-Select-"/> G
If yes, what is their primary language?	<input type="text" value="-Select-"/> G
If other language, please specify:	<input type="text"/> G

These are DC's Universal Data Elements. They are required regardless of your program's funding.

Income from Any Source -Select- G

Monthly Income

Receiving Income Source?	Source of Income	Monthly Amount	Start Date *	End Date
Add	View Gross Income			

HUD Verification 

Total Monthly Income G

HUD Verification: Monthly Income for 10/28/2019

Per Source of Income, the current records for Monthly Income as of 10/28/2019 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 10/28/2019, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Income Source? value for all incomplete Source of Income records

- ☐ [No](#)
☐ [Data Not Collected](#)
☒ [Incomplete](#)

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Earned Income (HUD)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
SSI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
TANF (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

[Save](#)
[Save & Exit](#)
[Exit](#)

- Begin by setting all incomplete values to "No"
- For each source of income, add the income source, receiving income source = Yes, monthly amount and start date.
- Once all income sources have been recorded via the HUD Verification, click "Save & Exit"



Income from Any Source -Select- G

Monthly Income

Receiving Income Source?	Source of Income	Monthly Amount	Start Date *	End Date
<input type="button" value="Add"/>	<input type="button" value="View Gross Income"/>			
Total Monthly Income		<input type="text"/>	G	

HUD Verification !



HUD Verification: Add Recordset

Per Source of records for Month Source of Income

Monthly Income

Receiving Income Source?	Yes
Source of Income	Earned Income (HUD)
If Other, Please Specify	<input type="text"/>
Monthly Amount	<input type="text"/>
Start Date *	10 / 28 / 2019
End Date	<input type="text"/>

Source of Income	Not Selected	Incomplete
Alimony or Other Support (HUD)	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input type="radio"/>
SSI (HUD)	<input type="radio"/>	<input type="radio"/>
TANF (HUD)	<input type="radio"/>	<input type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input type="radio"/>

- Begin by setting all incomplete values to "No"
- For each source of income, add the income source, receiving income source = Yes, monthly amount and start date.
- Once all income sources have been recorded via the HUD Verification, click "Save & Exit"

Non-cash benefit from any source

-Select-



Non-Cash Benefits

HUD Verification



Source of Non-Cash Benefit

Receiving Benefit?

Start Date *

End Date

Add

- Begin by setting all incomplete values to “No”
- For each source of Non-Cash Benefits, add the Non-Cash Benefit source, receiving benefit = “Yes”, and start date
- Once all Non-Cash sources have been recorded via the HUD Verification, click “Save & Exit”

HUD Verification: Non-Cash Benefits for 10/28/2019



Per Source of Non-Cash Benefit, the current records for Non-Cash Benefits as of 10/28/2019 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 10/28/2019, records containing “Yes” values will be displayed and take precedence for reporting purposes.

Select the Receiving Benefit? value for all incomplete Source of Non-Cash Benefit records

- ☐ [Yes](#)
- ☐ [No](#)
- ☐ [Data Not Collected](#)
- ☒ [Incomplete](#)

Source of Non-Cash Benefit	Receiving Benefit?			
	Yes	No	Data Not Collected	Incomplete
Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Special Supplemental Nutrition Program for WIC (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF Child Care Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF Transportation Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other TANF-Funded Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other Source (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save

Save & Exit

Exit



Covered by Health Insurance

-Select-

G

Health Insurance

Start Date *	Health Insurance Type	Covered?	End Date
<div>Add</div>			

HUD Verification

- Begin by setting all incomplete values to “No”
- For each type of Health Insurance, add the Health Insurance type, covered? = “Yes”
- Once all Health Insurance sources have been recorded via the HUD Verification, click “Save & Exit”

HUD Verification: Health Insurance for 10/28/2019

Per Health Insurance Type, the current records for Health Insurance as of 10/28/2019 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 10/28/2019, 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](#)

Health Insurance Type	Covered?			
	Yes	No	Data Not Collected	Incomplete
MEDICAID	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
MEDICARE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
State Children's Health Insurance Program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Veteran's Administration (VA) Medical Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Employer - Provided Health Insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Health Insurance obtained through COBRA	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Private Pay Health Insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
State Health Insurance for Adults	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Indian Health Services Program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Save

Save & Exit

Exit



Disability Type

Disability Determination

Above condition is
going to be long
term? (Retired)

Start Date *

Add

- Begin by setting all incomplete values to “No”
- For each Disability, add the disability type, determination, duration, and start date.
- Once all Disabilities have been recorded via the HUD Verification, click “Save & Exit”

HUD Verification: Disabilities for 10/28/2019



Per Disability Type, the current records for Disabilities as of 10/28/2019 are displayed below. Any previous records for Disabilities not overlapping as of this date are not displayed. In the event that multiple records exist per Disability Type as of 10/28/2019, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Disability Determination value for all incomplete Disability Type records

- ☐ [No \(HUD\)](#)
- ☐ [Client doesn't know \(HUD\)](#)
- ☐ [Client refused \(HUD\)](#)
- ☐ [Data not collected \(HUD\)](#)
- ☒ [Incomplete](#)

Disability Type	Disability Determination					
	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete
Alcohol Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Both Alcohol and Drug Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Chronic Health Condition (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Developmental (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Drug Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
HIV/AIDS (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Mental Health Problem (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Physical (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Save

Save & Exit

Exit

Disability Type

Disability Determination

Above condition is
going to be long
term? (Retired)

Start Date *

Add









- For each Disability, add the disability type, determination, duration, and start date.
- Once all Disabilities have been recorded via the HUD Verification, click “Save & Exit”

HUD Verification: Add Recordset

Per Disability Type
Disabilities not c
as of 10/28/











Select the Di
value for all i
Type records

Disabilities

Disability Type	Alcohol Abuse (HUD)
Disability Determination	Yes (HUD)
If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	-Select- 
Above condition is going to be long term? (Retired)	-Select- 
Start Date *	10 / 28 / 2019   
End Date	/ /   

Save **Cancel**

previous records for
t per Disability Type
orting purposes.

not cted ID)	Incomplete
	
	
	
	
	
	
	
	
	
	

Save **Save & Exit** **Exit**

- Domestic Violence Questions should be completed for Heads of Households and Adults.
 - Verification is not necessary unless required by your funder.
- Housing Move-In-Date will be detailed in the following slide.
- The Current Living Situation (CLS) sub-assessment replaces the “Contact” sub-assessment from previous years. It is required for YHDP Projects and Street Outreach Projects Only.
 - A CLS should be created each time a client has been directly contacted in a *meaningful* way.
 - This should be recorded for **Heads of Household** for each occurrence.

Domestic Violence Information

Do you have a history of domestic violence?	<input type="text" value="Yes (HUD)"/>	G
If yes, when experience occurred	<input type="text" value="Within the past three months (HUD)"/>	G
If yes, are you currently fleeing?	<input type="text" value="Yes (HUD)"/>	G

Required for All Permanent Housing Programs

Delete Any Date That Populates at Entry by Clicking the Blue Arrow

Housing Move-in Date	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>				G
----------------------	-------------------------------	-------------------------------	-------------------------------	--	--	--	---

Required for YHDP Projects

Current Living Situation			
Start Date *	End Date	Information Date	Current Living Situation
<input type="button" value="Add"/>			

Save

Save & Exit

Exit

Demo

End

ff

Section 2: The Client is in your Program

Part 1: Updates and Annual Assessments

- **Updates** are required for some data elements, including Housing Move-in Date.
- **Annual Assessments** are required to be entered within +/- 30 days of the Head of Household's Entry Anniversary.
- Updates and Annual Assessments have fewer questions to complete and/or update compared to the Entry Assessment.
- If you do not complete these, the system does not recognize the change in income and non-cash benefits that occur.

Creating an Update/Annual Assessment

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers








Case Plans

Measurements

Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
 HMIS Training (Program) (1064)	HUD	 10/28/2019				 

Add Entry / Exit
Showing 1-1 of 1

Exit

Creating an Update/Annual Assessment

Client Information | **Service Transactions**

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

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
No matches.		

Add Interim Review

Exit

Program

HMIS Train

Add Entry /

Exit Date	Interims	Follow Ups	Client Count

Exit

Creating an Update/Annual Assessment

Client Information | **Service Transactions**

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

Add Interim Review - (9) Solo, Han

Interim Review Data

Entry / Exit Provider: HMIS Training (Program) (1064)

Entry / Exit Type: HUD

Interim Review Type*: -Select-

Review Date*: 10 / 28 / 2019 5 : 39 : 26 PM

Save & Continue | Cancel

Exit

Interim Review Assessment

- The questions in the Interim review (Update or Annual Assessment) will depend upon the funding source of your program.
- Interim reviews generally contain data elements that may change over time.
- Review all information in the Interim Review to ensure it is still up-to-date. Make updates as needed.

Entry / Exit Interim Review

Interim Review Data

Entry / Exit Provider	HMIS Training (Program) (1064)
Entry / Exit Type	HUD
Interim Review Type	Update
Review Date	10/28/2019 05:42:12 PM

Interim Review Assessment

Household Members

(9) Solo, Han
☒ Age: 25
 Veteran: Yes (HUD)

HUD CoC & ESG Update (2020) TCP Interim Review Date: 10/28/2019 05:42:12 PM

CLIENT LOCATION UPDATE (IF APPLICABLE)

Client Location [G](#)

CoC-SPECIFIC DATA ELEMENTS

Are you engaged with case management? [G](#)

Rapid Re-housing and Permanent Housing

Housing Move In Date

Required for All Permanent Housing Programs

Delete Any Date That Populates at Entry by Clicking the Blue Arrow

Housing Move-in Date / /    

- For clients with a Project Start Date in a permanent housing project of any kind (including Rapid Re-housing), record the date a client or household moves into a permanent housing unit.
- When Entering a client into your program, you will want to make sure any Date that populates in the Housing Move-in Date is cleared so that the new, correct date may be entered for your program.
- This Housing Move-in Date **MAY** be the same date as the Entry Date, but more likely it will occur **AFTER** the entry date.
 - If it is on the same date as the Entry Date you **MAY** enter it on the Entry Assessment.
 - If it is **AFTER** the Entry Date, you **MUST** enter it in an Update.
- It is also possible that you may begin serving the client with the housing search, but end up unable to house the client. In this case the Housing Move-in Date will remain Blank and the client will be exited from your program.

Updating Sub-assessments

- If information in a sub-assessment has changed, we need to end the old information, and create new, accurate information.
- We do not want to Delete any information that used to be correct.
- We will add an End Date to the information that is no longer true, and then Add a new line in the sub-assessment with the new information.

Here we have the details of the Non-Cash Benefits sub-assessment.

In my update, I find out that the client now has Food Stamps. I will want to update this information in HMIS.

Show All Non-Cash Benefits Records

Non-Cash Benefits						
	Provider	Date Effective	Source of Non-Cash Benefit	Receiving Benefit?	Start Date	End Date
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Temporary rental assistance (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other Source (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other TANF-Funded Services (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Section 8, Public Housing, or other ongoing rental assistance (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Child Care Services (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Special Supplemental Nutrition Program for WIC (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	No	05/16/2017	








Add Showing 1-8 of 8 Exit

Here we have the details of the Non-Cash Benefits sub-assessment.

In my update, I find out that the client now has Food Stamps. I will want to update this information in HMIS.

This information is no longer true. I will add an End Date to this record for yesterday.

Show All Non-Cash Benefits Records

Non-Cash Benefits						
	Provider	Date Effective	Source of Non-Cash Benefit	Receiving Benefit?	Start Date	End Date
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Temporary rental assistance (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other Source (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Other TANF-Funded Services (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Section 8, Public Housing, or other ongoing rental assistance (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Child Care Services (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Special Supplemental Nutrition Program for WIC (HUD)	No	05/16/2017	
 	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	No	05/16/2017	

Add Showing 1-8 of 8 Exit

Here we have the details of the Non-Cash Benefits sub-assessment.

In my update, I find out that the client now has Food Stamps. I will want to update this information in HMIS.

This information is no longer true. I will add an End Date to this record for yesterday.

Once the End Date has been added, I will need to Add a new record for Food Stamps.

Show All | Edit Recordset - (9) Solo, Han

Non-Cash Benefits

Source of Non-Cash Benefit: Supplemental Nutrition Assistance Program (Food Stamps) (HUD) G

Receiving Benefit?: No G

If Other, Please Specify: G

Amount of Non-Cash Benefit: G

Start Date *: 05 / 16 / 2017 G

End Date: 10 / 27 / 2019 G

Print Recordset Save Cancel

	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017	
	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Child Care Services (HUD)	No	05/16/2017	
	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Special Supplemental Nutrition Program for WIC (HUD)	No	05/16/2017	
	District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	No	05/16/2017	10/27/2019

Add Showing 1-8 of 8 Exit

Here we have the details of the Non-Cash Benefits sub-assessment.

In my update, I find out that the client now has Food Stamps. I will want to update this information in HMIS.

This information is no longer true. I will add an End Date to this record for yesterday.

Once the End Date has been added, I will need to Add a new record for Food Stamps.

Since the client is receiving food stamps now, I answer “Receiving Benefit” = “Yes.

The Start Date = today’s date.

Show All Add Recordset

Non-Cash Benefits

Source of Non-Cash Benefit: Supplemental Nutrition Assistance Program (Food Stamps) (HUD) G

Receiving Benefit? Yes G

If Other, Please Specify: G

Amount of Non-Cash Benefit: G

Start Date*: 10 / 28 / 2019 G

End Date: G

Save Cancel

District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Transportation Services (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	TANF Child Care Services (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Special Supplemental Nutrition Program for WIC (HUD)	No	05/16/2017	
District of Columbia Homeless Management Information System (HMIS) (2)	05/16/2017 3:19:54 PM	Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	No	05/16/2017	10/27/2019

Add Showing 1-8 of 8

Exit

Demo

End

ff

Section 2: The Client is in your Program

Part 2: Case Plans

- Case Plans are required for DHS and TCP funded programs
- There are multiple parts to case plans – detailed in the following slides.

Adding a Case Manager

Step One: Go the **Case Managers** tab on the client profile screen:

Client - (9) Solo, Han

Mass Visibility Update

(9) Solo, Han

Release of Information: None

-Switch to Another Household Member- Submit

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers


Case Plans

Measurements

Assessments

Added to the system 02/23/2001 02:45 PM

Name	Solo, Han	Gender	Male
Date of Birth	05/02/1994 (Age 25)	Primary Race	White (HUD)
Social Security	202-20-2020	Secondary Race	
		U.S. Military Veteran?	Yes (HUD)



This will take you to the **Case Managers** data entry screen.


















The Community Partnership
For The Prevention
of Homelessness

Client Information

Service Transactions

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

Case Managers

	Name	Provider	Phone Number	Start Date	End Date
  	Kurstin Powell	Community Connections (CCDC)(Agency)		04/09/2019	
  	Daijah Walters	Casa Ruby (Agency)	202-355-5155	01/21/2019	
  	Brandon James	DHS - Project Reconnect - HP IND - DHS Direct		01/04/2019	
  	Charlene Dion Cotton	Community Connections (CCDC)(Agency)	2025461512	04/09/2019	
  	Adam Weaver	CCDC - Coordinated Entry for ADULT Single Individuals CABHI Grant		05/09/2019	

Add Case Manager

Showing 1-5 of 5

Case Manager

Case Manager - (9) Solo, Han

Household Members

No Household Members were originally associated.

Include Additional Household Members

Type* ☐ ServicePoint User ☐ Me ☒ Other

Name* Obi Wan Kenobi

Title Jedi Master

Phone Number 555-456-3126

Email Address Obiwan@jedimasters.org

Provider* District of Columbia
Homeless Management
Information System (HMIS)
(2)

Search

My Provider

Clear

Start Date* 10 / 27 / 2019

End Date

Save Case Manager

Exit

- Choose whether the Case Manager is a ServicePoint User, Yourself, or someone else.
- Complete the contact information
- Click Save Case Manager

Case Manager FAQs

Can I add more than one case manager to a client's case manager tab?

Yes. In some cases a provider may have a case manager and other service staff person such as a housing specialist or employment specialist working with a given client.

How do I indicate that a case manager is no longer working with a given client?


The case managers data entry screen has Start Date and End Date Fields to indicate when a case manager begins and ends working with a given client. This is where a case manager can indicate that he is no longer working with a client.

Step One: Go the Case Plans tab in ClientPoint:

Client - (9) Solo, Han Mass Visibility Update

(9) Solo, Han

Release of Information: **None** -Switch to Another Household Member-

Client Information				Service Transactions				
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Measurements	Assessments
Added to the system 02/23/2001 02:45 PM								
Name	Solo, Han			Gender	Male			
Date of Birth	05/02/1994 (Age 25)			Primary Race	White (HUD)			
Social Security	202-20-2020			Secondary Race				
				U.S. Military Veteran?	Yes (HUD)			
Release of Information				Entry / Exits				

Step Two: On the Goals Screen click Add Goal:

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit









































Case Managers

Case Plans

Measurements

Assessments

Goals

		Provider	Classification	Type	Date Added	Date Set	User Updating	Status	Notes	Latest Note Date	
		Community Connections (CCDC) (Agency)	Employment	Obtain employment	04/09/2019	04/09/2019	Chris Fischer	In Progress		04/09/2019	
		Community Connections (CCDC) (Agency)	Employment	Obtain employment	04/09/2019	04/09/2019	Kurstin Powell	In Progress		04/09/2019	
		Community Connections (CCDC) (Agency)	Employment	Obtain employment	04/09/2019	04/09/2019	Chris Fischer	In Progress		04/09/2019	
		Community Connections (CCDC) (Agency)	Education	Get GED	02/26/2019	02/25/2019	Chris Fischer	Closed		02/26/2019	
		Community Connections (CCDC) (Agency)	Case Management	90 Day Case Plan Update	02/07/2019	02/07/2019	Chris Fischer	In Progress		02/07/2019	
		DHS - Project Reconnect - HP IND - DHS Direct	Project Reconnect	Mediation Services	01/04/2019	01/04/2019	Eileen Kroszner	In Progress			
		DHS - Project Reconnect - HP IND - DHS Direct	Project Reconnect	Mediation Services	01/04/2019	01/04/2019	Eileen Kroszner	In Progress			
		DHS - Project Reconnect - HP IND - DHS Direct	Project Reconnect	Mediation Services	01/04/2019	01/04/2019	Eileen Kroszner	In Progress			
		PHDC - Coordinated Entry for ADULT Single Individuals Outreach Grant	SPDAT	C. Medication	05/31/2017	05/31/2017	Eileen Kroszner	In Progress			
		NSV - Coordinated Entry for ADULT Single Individuals	SPDAT	A. Mental Health & Wellness & Cognitive Functioning	05/19/2017	05/19/2017	Gabriel DeLong	In Progress			

Add Goal

Showing 1-10 of 20

First

Previous

Next

Last

Complete all the fields in the
Goal Pop-up box.

Once complete, click “Add Goal”

Goal

Goal - (9) Solo, Han

Household Members

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

(48241) Two Parent Family

(1) Client, Example

(9) Solo, Han

Provider*

District of Columbia Homeless Management Information System (HMIS) (2)

Search My Provider Clear

Case Manager

-Select-

Date Goal was Set*

10 / 28 / 2019

Classification*

-Select-

Type*

-Select-

Goal Description

Target Date

Overall Status*

-Select-

If Closed, Outcome

-Select-

If Partially Complete, Percent Complete

-Select-

Projected Follow Up Date

Follow Up User

District of Columbia Homeless Management Information System (HMIS) (2)

Search My Provider Clear

-Select-

Follow Up Made

-Select-

Completed Follow Up Date

Outcome at Follow Up

-Select-

Add Goal

Cancel

Case Notes

Case Note

Case Note - (9) Solo, Han

Household Members

No Household Members were originally associated.

Provider*

District of Columbia Homeless Management Information System (HMIS) (2)

Search My Provider Clear

Case Manager

Obi Wan Kenobi

Note Date*

10 / 28 / 2019

Note*

Add Case Notes Here. |

Save Case Note

Cancel

Case Notes

Provider	Case Manager	User Creating	Note Date	Note
District of Columbia Homeless Management Information System (HMIS)		Sarah Honda	01/24/2017	write in note here

Add Case Note

Showing 1-1 of 1

Action Steps Planned

Action Step	Target Date	Status	Outcome
No matches.			

Add Action Step

Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need
No matches.				

Add Service

Add Multiple Services

Print

Save Goal

Save & Exit

Exit

Action Steps

Case Notes

Provider	Case Manager	User Creating Note	Date	Note
District of Columbia Homeless Management Information System (HMIS)		Sarah Honda	01/24/2017	write in note here

Add Case Note
Showing 1-1 of 1

Action Steps Planned

Action Step	Target Date	Status	Outcome
No matches.			

Add Action Step

Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need
No matches.				

Add Service
Add Multiple Services

Print
Save Goal
Save & Exit
Exit

Action Step

Action Step - (9) Solo, Han

Household Members

No Household Members were originally associated.

Provider*
District of Columbia Homeless Management Information System (HMIS) (2)
Search
My Provider
Clear

Date Action Step was set
10 / 28 / 2019

Action Step*

Target Date
/ /

Overall Status*
-Select-

If Closed, Outcome
-Select-
/ /

Projected Follow Up Date
/ /

Follow Up User
District of Columbia Homeless Management Information System (HMIS) (2)
Search
My Provider
Clear

Follow Up Made
-Select-

Completed Follow Up Date
/ /

Outcome at Follow Up
-Select-







Save Action Step
Cancel



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Goal Follow ups

- Goals and action steps have fields that allow case managers to indicate the date they plan to follow up with a client (**Projected Follow Up Date**), the staff person who will be following up (**Follow Up User**) the date the follow up was actually made (**Completed Follow Up Date**), and the outcome at follow up (**Outcome at Follow Up**):

Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Follow Up User	District of Columbia Homeless Management Information System (HMIS) (2) <input type="text" value="-Select-"/>
	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
Follow Up Made	<input type="text" value="-Select-"/>
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Outcome at Follow Up	<input type="text" value="-Select-"/>

Updating Goals and Action Steps FAQ

What if a goal or action step requires follow up more than once?

Case managers can reset the projected follow up date, completed follow up date, and outcome at follow up at each follow up.

If the client does not reach the goal by the Target Date, you can reset the target date to a new date instead of creating a new goal.

Ending a Goal

Goals and action steps have fields that allow case managers to indicate the status of a goal (**Overall Status**), and the outcome and date the goal was closed out (**If Closed, Outcome and Date Field**):

Overall Status *	Closed			
If Closed, Outcome	Achieved	10	28	2019





Please note: Action Steps are the action items a client needs to accomplish in order to achieve a larger goal, so all Action Steps should be closed out on or before the date the goal they support is closed.

Demo

End

ff

Part 3: The Client leaves your Program

Part 1: Exiting a single client

- Once a client has exited your program, you will need to create an exit in HMIS.

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Measurements

Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
<div> HMIS Training (Program) (1064) </div>	HUD	<div> 10/28/2019 </div>	<div> </div>	<div> 2 </div>	<div> </div>	<div> 1 </div>

Add Entry / Exit

Showing 1-1 of 1

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Set the exit date to the date the client left your program and the time to the standard 12:01:00 A.M.

Next Set the exit Destination. The destinations with “(VW)” next to them are specific to Virginia Williams.

Edit Exit Data - (9) Solo, Han

Edit Exit Data - (9) Solo, Han

Exit Date *

10

/

28

/

2019

Reason for Leaving

-Select-

If "Other", Specify

Destination *

-Select-

If "Other", Specify

Notes

Save & Continue

Cancel

- The Exit assessment is similar to the Update and Annual Assessment in that you can update the same fields if anything changes the day the client leaves your program
- Depending on your program's funding source, you may have additional questions that only appear at Exit.
- Be careful to read the assessment carefully to ensure you are answering all questions.

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* HMIS Training (Program) (1064) Search My Provider Clear
Type* HUD Update

Household Members Associated with this Entry / Exit

	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Not
	(9) Solo, Han		10/28/2019	10/28/2019				Permanent housing (other than RRH) for formerly homeless persons (HUD)	

Include Additional Household Members Showing 1-1 of 1

Entry Assessment **Exit Assessment**

Household Members

☒ (9) Solo, Han
Age: 25
Veteran: Yes (HUD)

HUD CoC & ESG Exit (2020) TCP Exit Date: 10/28/2019 06:05:54 PM

CoC-SPECIFIC DATA ELEMENTS

Are you engaged with case management? Yes G

Client Contact Information - Adults Only

Client Email Address (Optional But Encouraged) G

Whose email address is this? -Select- G

Client Phone Number (Optional But Encouraged) G

Whose phone number is this? -Select- G

Client Identification Information

Does the client have their birth certificate? -Select- G

Does the client have their social security card? -Select- G

Demo

End

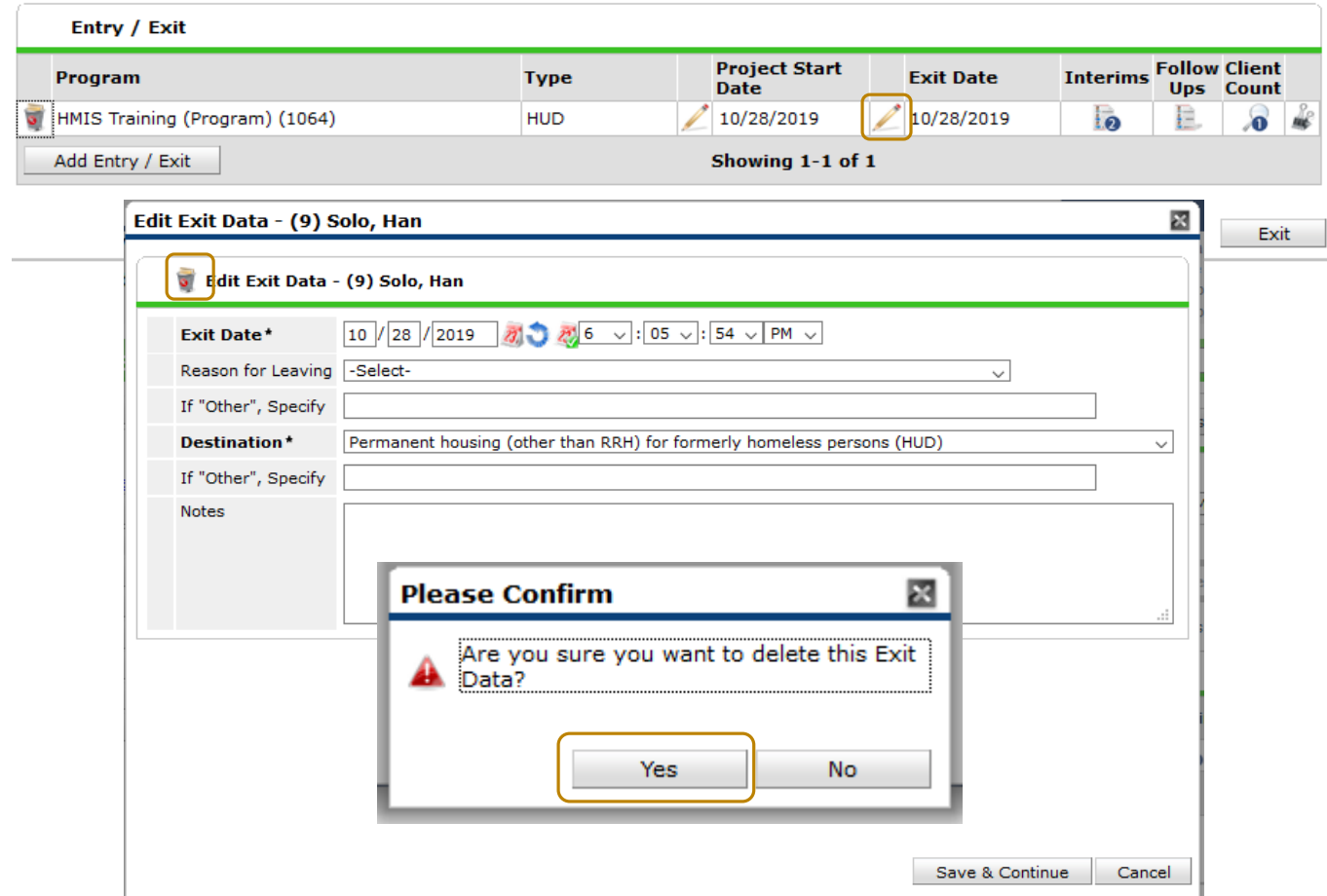
ff

Common Data Entry Errors

- Exiting a client by mistake
- Creating an Update instead of an Annual Assessment

Exiting a Client by Mistake

- Sometimes we exit a client when we did not mean to.
- This can be fixed by deleting the exit. First we must click the Exit Edit Pencil.
- Then we click the Trash can in the Edit Exit Data pop-up.
- Click “Yes” to confirm and delete the exit.



The screenshot shows the 'Entry / Exit' table for 'HMIS Training (Program) (1064)'. The table has columns: Program, Type, Project Start Date, Exit Date, Interims, Follow Ups, and Client Count. The 'Exit Date' column for the entry '10/28/2019' has a pencil icon next to it, which is highlighted with a yellow box. Below the table is a button 'Add Entry / Exit' and a status 'Showing 1-1 of 1'.

The 'Edit Exit Data - (9) Solo, Han' pop-up window is open. It has a trash can icon in the top left corner, which is highlighted with a yellow box. The form contains the following fields:

- Exit Date ***: 10 / 28 / 2019
- Reason for Leaving**: -Select-
- If "Other", Specify**: (empty text box)
- Destination ***: Permanent housing (other than RRH) for formerly homeless persons (HUD)
- If "Other", Specify**: (empty text box)
- Notes**: (empty text box)

A 'Please Confirm' dialog box is overlaid on the form, asking 'Are you sure you want to delete this Exit Data?'. The 'Yes' button is highlighted with a yellow box. At the bottom right of the pop-up are 'Save & Continue' and 'Cancel' buttons.

Creating an Update instead of an Annual Assessment

- Sometimes we choose the wrong type of Interim Review.
- Here I meant to enter an Annual Review but made an Update instead.
- This can be fixed by updating the Interim Review Type.
- Click the Edit Pencil for the Update.

Client Information | Service Transactions

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

Reminder: Household members must be established on Households tab before creating an Entry / Exit

Interim Reviews

Interim Reviews Associated with this Entry / Exit

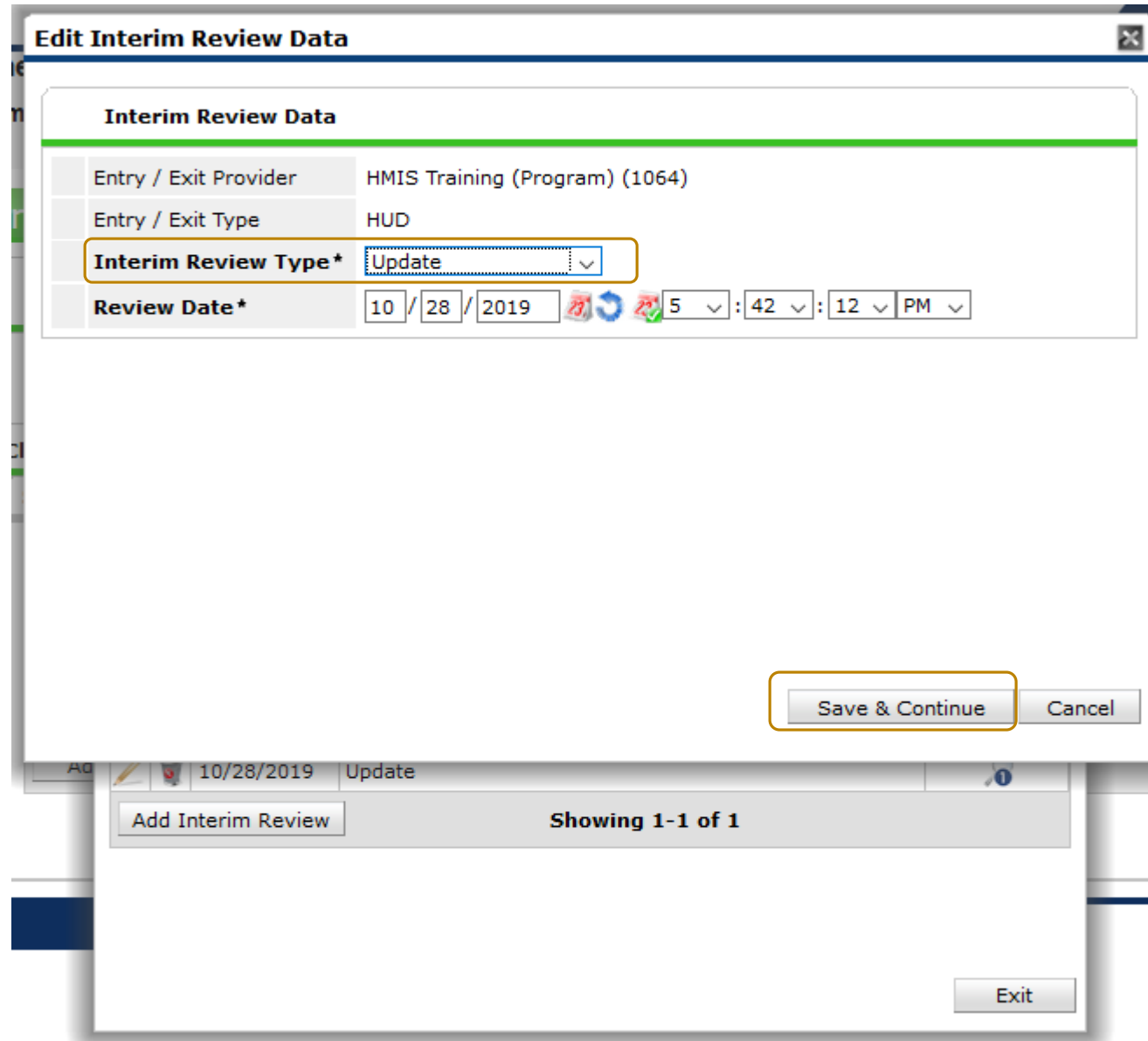
Review Date	Review Type	Client Count
10/28/2019	Update	1

Add Interim Review

Showing 1-1 of 1

Exit

- Change the Interim Review Type to Annual Assessment
- Click Save & Continue.
- If you have already made all your updates to the Assessment, click Save & Exit.





Edit Interim Review Data

Interim Review Data

Entry / Exit Provider	HMIS Training (Program) (1064)
Entry / Exit Type	HUD
Interim Review Type *	Update
Review Date *	10 / 28 / 2019 5 : 42 : 12 PM

Save & Continue Cancel

AD		10/28/2019	Update	
----	---	------------	--------	---

Add Interim Review Showing 1-1 of 1

Exit



Policies

HMIS Policy Updates

Data Sharing

Updated language around what is shared automatically within the system and what requires a Release of Information.

Stage 2 of these updates includes a Universal ROI, in process of being drafted.

Training



Added: Timely log in



Added: Successful
completion of training



Added: Annual
Security Training
Requirement



Added: Recertification
Training



Added: HMIS Training
as Remedial Training

Timely Login

- Once a user has completed HMIS Training, they must submit their signed User Agreement and log into HMIS within 60 days of training completion. Failure to do so will result in a user needing to complete HMIS training, or a test of the data entry trained upon in the HMIS Training, and resubmission of their User Agreement before gaining access to the DC HMIS.
- User Accounts will also be monitored for regular login. The Lead Agency has the right to remove a user's account if the user does not log in in six (6) months. The user will need to complete a data test or complete HMIS training to regain access to the DC HMIS.

Successful Completion of Training

- Lead Agency Staff may determine that a new user has failed to grasp the necessary data entry concepts during training.
- Lead Agency staff may use their discretion to require new users to repeat HMIS Training. If a new user fails to successfully complete HMIS Training after repeated attempts, Lead Agency staff may use their discretion to determine that the new user is not capable of accurate and complete data entry and may refuse to issue the new user a DC HMIS user license.
- The Lead Agency will work with the user's Agency Administrator to determine next steps needed for the user to be able to gain access to the system, including but not limited to computer training.

Annual Security Training

- All users are required to attend annual security training provided by the Lead Agency to retain their user license.
- This is a HUD requirement
- Had the training last year in November; this year the EDA training covers the Security Training
- Keeping it in line with HUD Data Standards changes (September/October)

Recertification Training

- At the discretion of the Lead Agency, users may be required to complete a recertification training in the event of significant changes to data collection requirements, data entry workflow, or HMIS policies and procedures. Users who do not complete recertification training in a timely fashion may have their licenses suspended until training has been completed.
- EXAMPLE – this EDA Training

HMIS Training as Remedial Training

- If the Lead Agency or Agency Administrator determines that data entered by a current user does not meet minimum data quality standards, or if a user has not accessed the system within three (3) months of completing HMIS Training, users may be required to repeat the training.

User Violations

HMIS users and Partner Agencies must abide by all HMIS policies and procedures found in the HMIS Policies and/Procedures manuals, the User Agreement, and the Agency Agreement. Repercussions for any violation will be assessed in a tiered manner. Each user or Partner Agency violation will face successive consequences – the violations do not need to be of the same type in order to be considered second or third violations. User violations do not expire. No regard is given to the duration of time that occurs between successive violations of the HMIS policies and procedures as it relates to corrective action.

First Violation

- **First Violation** – The user and Partner Agency will be notified of the violation in writing by the Lead Agency. The user's license will be suspended for 30 days, or until the Partner Agency notifies the Lead Agency of action taken to remedy the violation. The Lead Agency will provide necessary training to the user and/or the Partner Agency to ensure the violation does not continue.



30-day Suspension



Possibility of
Shortened Suspension



Training

Second Violation



30-day suspension



No Shortening of
Suspension



training requirement

- **Second Violation** – The user and Partner Agency will be notified of the violation in writing by the Lead Agency. The user's license will be suspended for 30 days. The user and/or the Partner Agency must take action to remedy the violation; however, this action will not shorten the length of the license suspension. If the violation has not been remedied by the end of the 30-day user license suspension, the suspension will continue until the Partner Agency notifies the Lead Agency of the action taken to remedy the violation. The Lead Agency will provide necessary training to the user and/or the Partner Agency to ensure the violation does not continue.

Third Violation



Review Panel Formed



Minimum 30-day
suspension



Potential Revocation of
License

- **Third Violation** – The user and Partner Agency will be notified of the violation in writing by the Lead Agency. The Lead Agency will convene a review panel made up of Lead Agency Staff who will determine if the user's license should be terminated. The user's license will be suspended for a minimum of 30 days, or until Lead Agency review panel makes their determination, whichever occurs later. If the Lead Agency review panel determines the user should retain their user license, the Lead Agency will provide necessary training to the user and/or Partner Agency to ensure the violation does not continue. If users who retain their license after their third violation have an additional violation, that violation will be reviewed by the Lead Agency review panel.

Additional Information

- It is the responsibility of each Agency Administrator and user to notify the HMIS Lead Agency **within 24 hours** of when they suspect that a User or Partner Agency has violated any HMIS operational agreement, policy, or procedure.
- A complaint about a potential violation must include the User and Partner Agency name a description of the violation, including the date or timeframe of the suspected violation.
- Complaints should be sent in writing to the HMIS Lead Agency at HMIS@community-partnership.org. The name of the person making the complaint will not be released from the HMIS Lead Agency if the individual wishes to remain anonymous.
- Any Partner Agency or user violation of local, district, or federal law will immediately be subject to the consequences listed under the Third Violation above.
- All violations will be assessed by the Lead Agency and depending on their severity may be subject to the consequences listed under the Third Violation above as determined by the Lead Agency.
- During a 12-month calendar year, if there are multiple users (three or more) with multiple violations (2 or more) from one Partner Agency, the Partner Agency as a whole will be subject to the consequences listed under the Third Violation above.

Updated User Agreement

- The HMIS User Agreement has been updated and digitized.
- *All users must report any potential conflict of interest to their Agency Administrator. Users who are also clients with files in the HMIS are prohibited from entering or editing information in their own file. All users are also prohibited from entering or editing information in files of immediate family members. The Lead Agency may run an HMIS user audit trail report to determine if there has been a violation or suspected violation of the conflict of interest agreement. *
- **ALL users must sign a new HMIS User Agreement by 10/1/2020**

Additional Resources

- Helpdesk: hmis@community-partnership.org
 - Email the helpdesk with questions and we will provide answers and resources.
 - We respond within 2 business days.
- Trainings:
 - We hold HMIS trainings every month.
 - They are open to all, new user, seasoned veteran, or anywhere in between
 - Training eventbrites are found at <http://community-partnership.org/providers/training>
 - Have questions about the trainings? Email the helpdesk!



Thanks for participating!

Questions?

HMIS Help-Desk Email: hmis@community-partnership.org