



The Community Partnership
For The Prevention
of Homelessness

HMIS Training

DC 104: LOW BARRIER SHELTERS AND SEVERE WEATHER SHELTERS

Agenda

- HMIS Basics Recap
- Introduction to ShelterPoint
- Checking a client into a bed
- Creating a new client
- Completing Client Profile information
- Low Barrier Assessment
- Case Plans
- Exiting a client from a bed
- Exiting multiple clients from beds
- Common Data Entry Errors
- Additional Resources

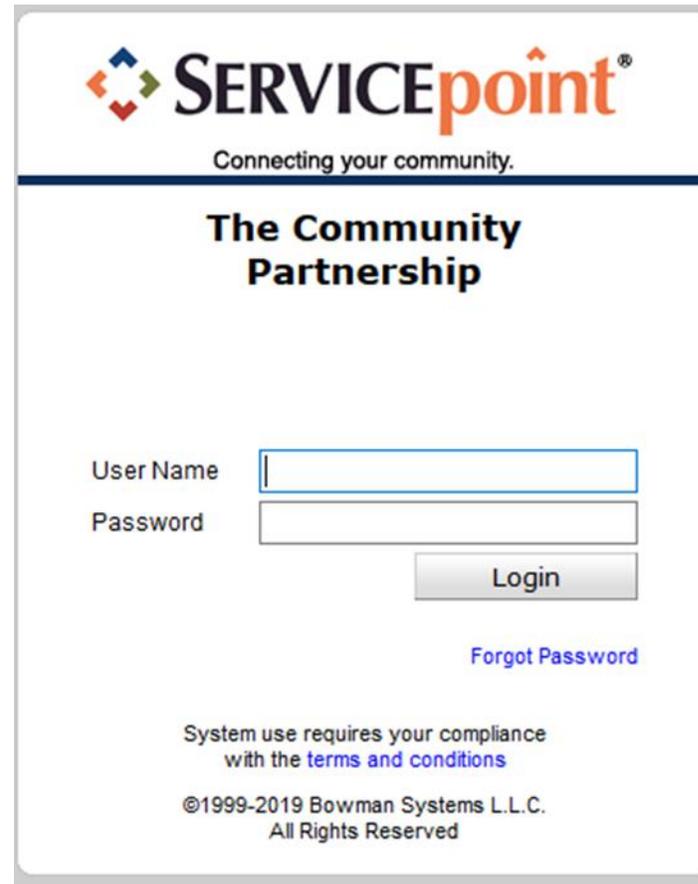
HMIS Basics Recap

- 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



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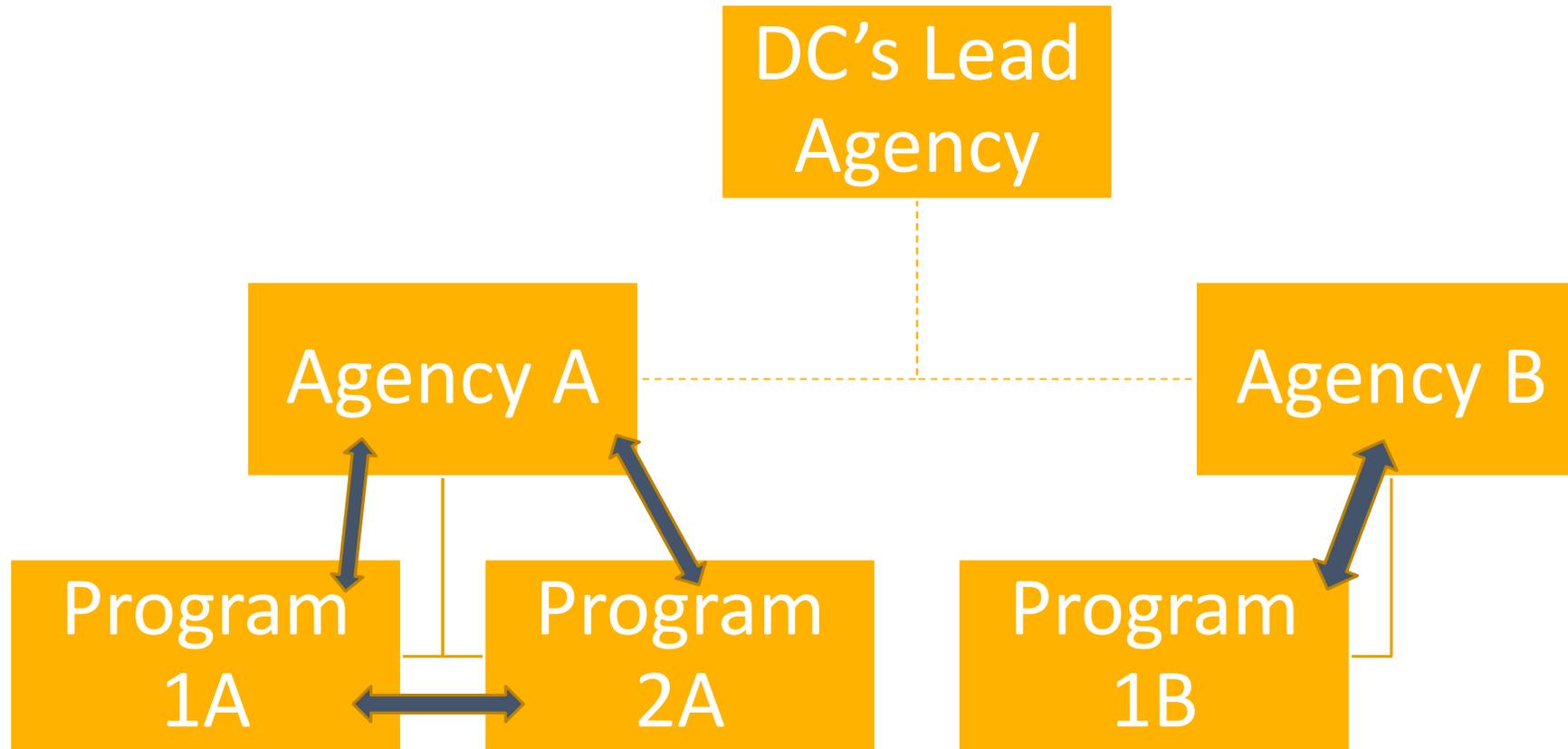
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Who Can See What?

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

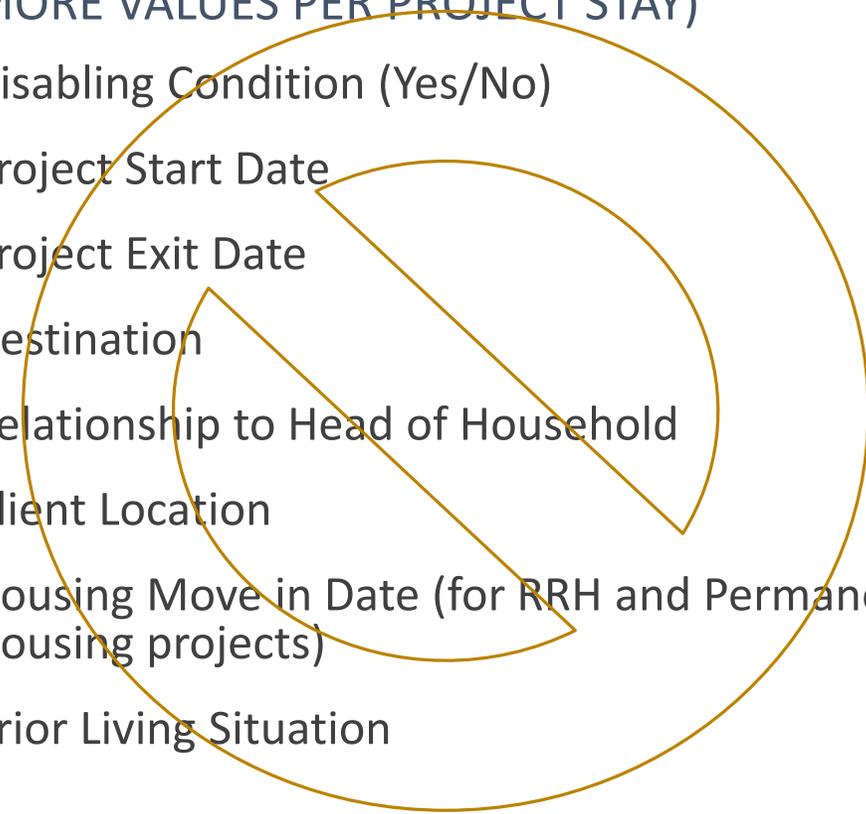
UNIVERSAL IDENTIFIERS (ONE ANSWER PER CLIENT RECORD)

- 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
- 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.
- “Agency Name/Acronym - Coordinated Entry for ADULT Single Individuals”
- “Agency Name/Acronym - Coordinated Entry for YOUTH Single Individuals”

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.

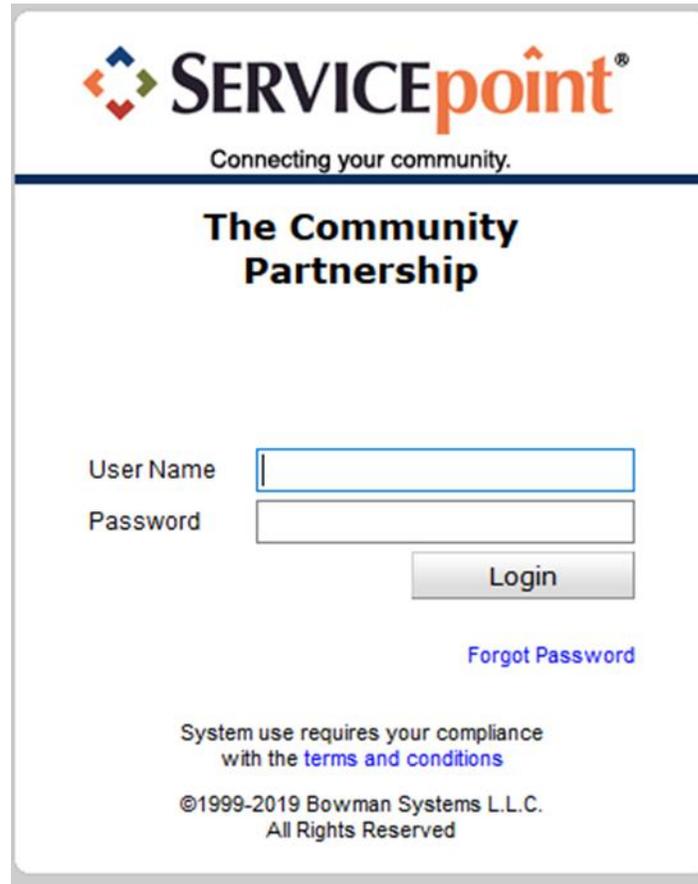
Data Security

- 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/



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Live site:

<https://washdc.servicept.com>

Logging In

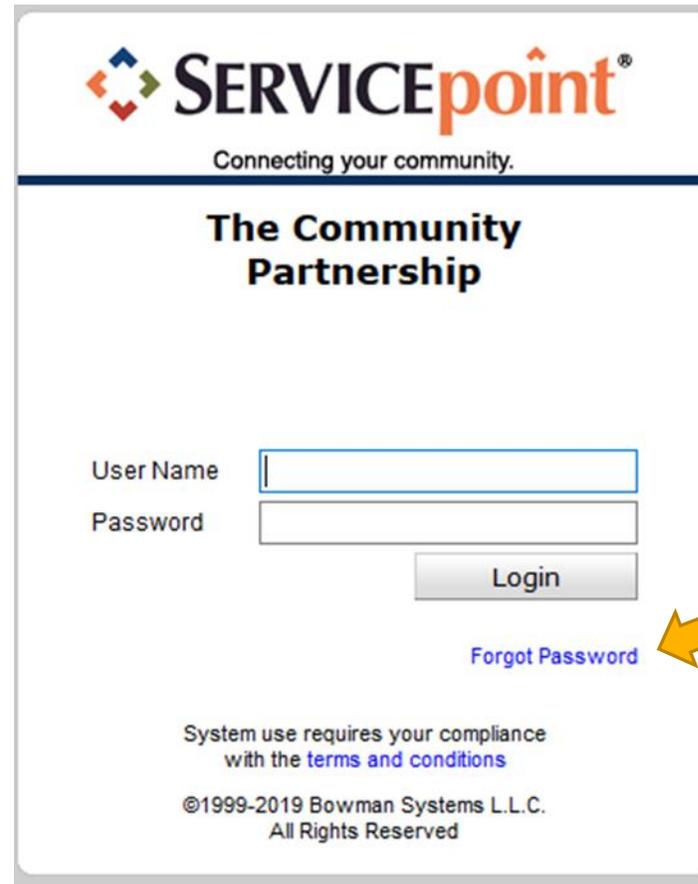
Training site:

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Forgot your password?



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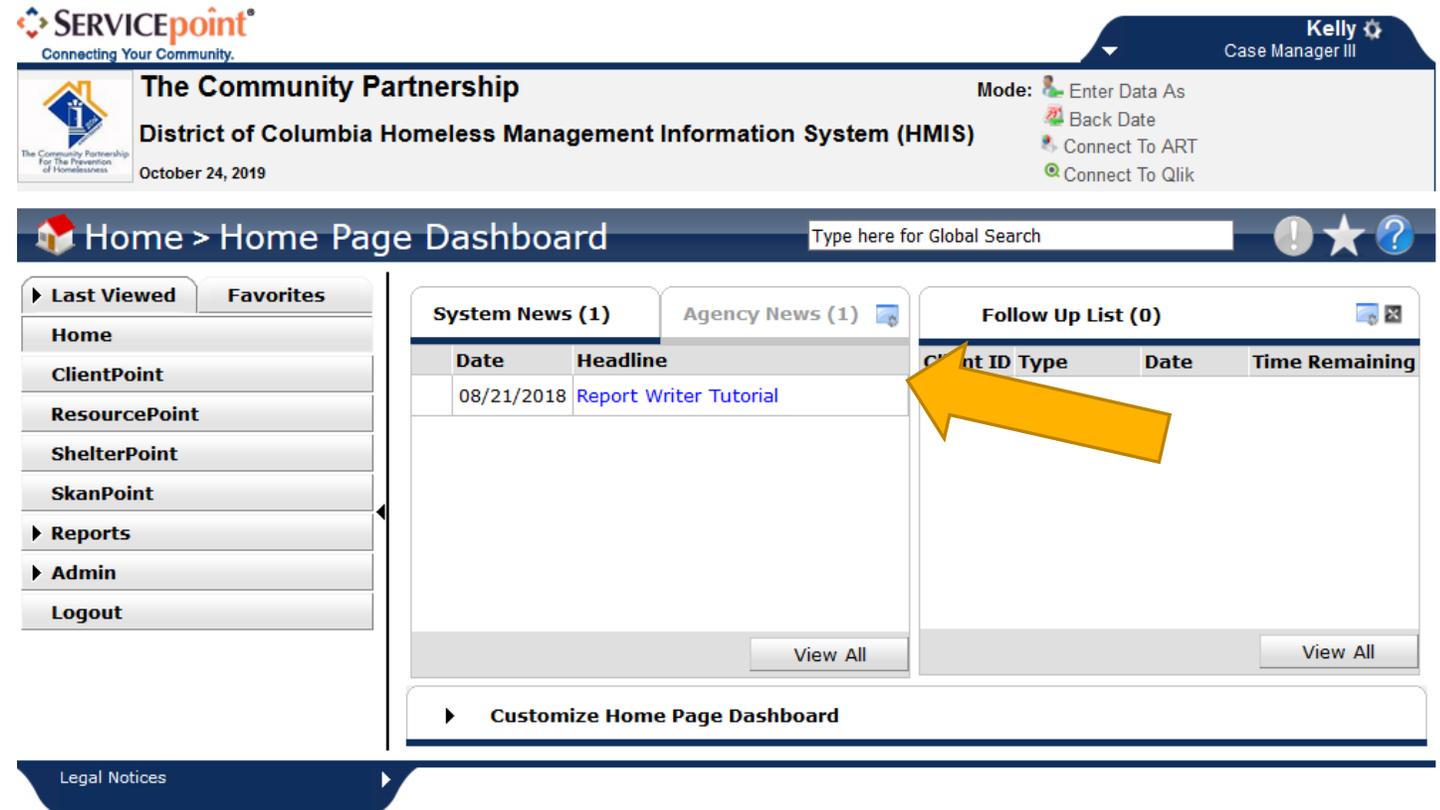
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Click here!

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

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

System News (1)

Date	Headline
08/21/2018	Report Writer Tutorial

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

What is Enter Data As?



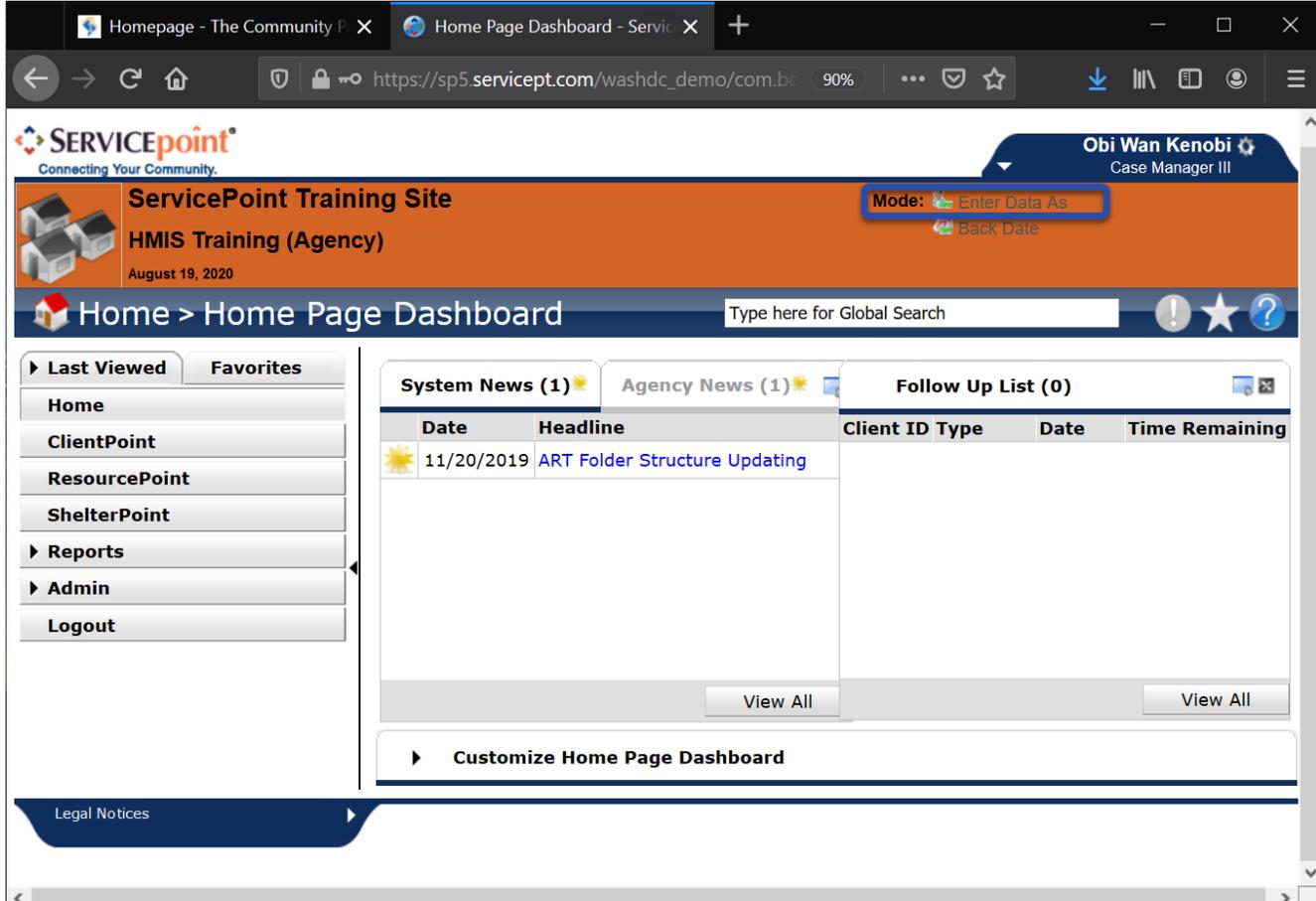
- Most agencies have multiple programs that they operate. These often are in different buildings.
- Using Enter Data As is like physically going from one program to another but within the Database.

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



Homepage - The Community P... Home Page Dashboard - Servic...
 https://sp5.servicept.com/washdc_demo/com.bc 90%
 SERVICEpoint Connecting Your Community. Obi Wan Kenobi Case Manager III
 Mode: Enter Data As Back Date
 ServicePoint Training Site
 HMIS Training (Agency)
 August 19, 2020
 Home > Home Page Dashboard Type here for Global Search
 Last Viewed Favorites
 Home
 ClientPoint
 ResourcePoint
 ShelterPoint
 Reports
 Admin
 Logout
 System News (1) Agency News (1) Follow Up List (0)

Date	Headline	Client ID Type	Date	Time Remaining
11/20/2019	ART Folder Structure Updating			

 View All View All
 Customize Home Page Dashboard
 Legal Notices

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

Provider Number

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

Provider ID #

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
		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

- 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

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

Provider Number

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

Provider ID #

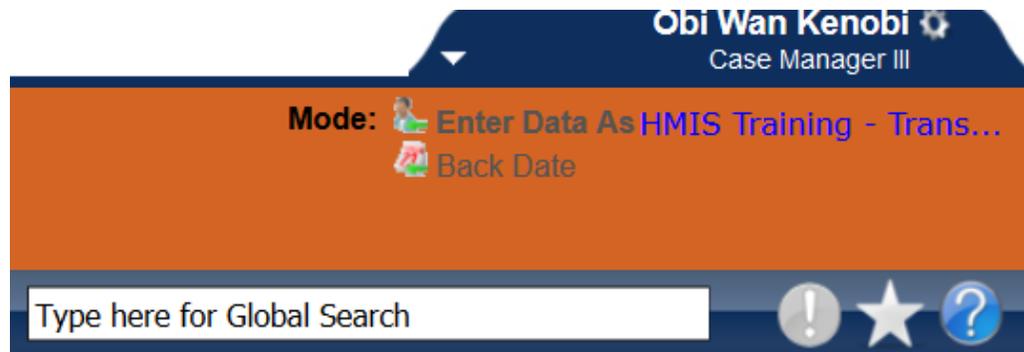
Provider Search Results

#	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
			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

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 ShelterPoint

- ShelterPoint is used by Low Barrier Shelters in order to track shelter stays.
- ShelterPoint uses bed lists to organize clients who are served in the shelter.
- ShelterPoint is a separate module within ServicePoint.



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

Home > Home Page Dashboard

Type here for Global Search



- ▶ Last Viewed
- Favorites
- Home
- ClientPoint
- ResourcePoint
- ▶ ShelterPoint
- SkamPoint
- ▶ Reports
- ▶ Admin
- Logout



System News (1)

Agency News (1)

Follow Up List (0)

Date	Headline
08/21/2018	Report Writer Tutorial

Client ID	Type	Date	Time Remaining
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View All

View All

▶ Customize Home Page Dashboard

Legal Notices



ShelterPoint > View Shelter Inventory ! ★ ?

View Shelter Inventory

Provider * HMIS Training (Program) (1064)

Unit List * HMIS Test Program ←

Type Emergency Shelter

ShelterPoint Dashboard

- Check Client In
- Express Check In
- Check In Reservation
- Check In Referral
- Hold ALL Empty Beds
- Print ID Cards
- Update Confirmation List
- Transmit Today's Check Out List
- View All

Legal Notices ▶



- ▶ Last Viewed
- Favorites
- Home
- ClientPoint
- ResourcePoint
- ShelterPoint
- SkansPoint
- ▶ Reports
- ▶ Admin
- Logout

View Shelter Inventory

Provider *	HMIS Training (Program) (1064)	Search	My Provider	Clear	Check Unit Availability
Unit List *	HMIS Test Program	Submit			
Type	Emergency Shelter				

ShelterPoint Dashboard

 Check Client In	 Express Check In	 Check In Reservation	 Check In Referral	 Hold ALL Empty Beds
 Print ID Cards	 Update Confirmation List	 Transmit Today's Check Out List	 View All	



- ▶ Last Viewed
- Favorites
- Home
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- ResourcePoint
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- SkanPoint
- ▶ Reports
- ▶ Admin
- Logout

View Shelter Inventory

Provider *	HMIS Training (Program) (1064)	Search	My Provider	Clear	Check Unit Availability
Unit List *	HMIS Test Program	Submit			
Type	Emergency Shelter				

ShelterPoint Dashboard

 Check Client In	 Express Check In	 Check In Reservation	 Check In Referral	 Hold ALL Empty Beds
 Print ID Cards	 Update Confirmation List	 Transmit Today's Check Out List	 View All	



- ▶ Last Viewed
- Favorites
- Home
- ClientPoint
- ResourcePoint
- ShelterPoint
- SkanPoint
- ▶ Reports
- ▶ Admin
- Logout

View Shelter Inventory

Provider *	HMIS Training (Program) (1064)	Search	My Provider	Clear	Check Unit Availability
Unit List *	HMIS Test Program	Submit			
Type	Emergency Shelter				

ShelterPoint Dashboard

 Check Client In	 Express Check In	 Check In Reservation	 Check In Referral	 Hold ALL Empty Beds
 Print ID Cards	 Update Confirmation List	 Transmit Today's Check Out List	 View All	

Checking a client into a bed

- Once you have selected the correct bedlist you can begin adding shelter stays for clients. You have the option of either adding shelter stays for 1 client at a time or adding shelter stays to multiple clients at the same time**.

**Note that if you are entering multiple clients at the same time they must all have the same entry date and time. This is usually only a good solution if there is historical information that needs to be entered.



- ▶ Last Viewed
- Favorites
- Home
- ClientPoint
- ResourcePoint
- ShelterPoint
- SkandPoint
- ▶ Reports
- ▶ Admin
- Logout

View Shelter Inventory

Provider *	HMIS Training (Program) (1064)	Search	My Provider	Clear	Check Unit Availability
Unit List *	HMIS Test Program	Submit			
Type	Emergency Shelter				

ShelterPoint Dashboard

 Check Client In	 Express Check In	 Check In Reservation	 Check In Referral	 Hold ALL Empty Beds
 Print ID Cards	 Update Confirmation List	 Transmit Today's Check Out List	 View All	



- ▶ Last Viewed
- ▶ Favorites
- Home
- ClientPoint
- ResourcePoint
- ShelterPoint
- SkamPoint
- ▶ Reports
- ▶ Admin
- Logout

View Shelter Inventory

Provider* HMIS Training (Program) (1064)

Unit List*

Type Emergency Shelter

Shelter Inventory Information

Unit List - HMIS Test Program

Display Sort By

	Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
		1	1	Bed 001	Hold	EMPTY					
		1	1	Bed 002	Hold	EMPTY					
		1	1	Bed 003	Hold	EMPTY					
		1	1	Bed 004	Hold	EMPTY					
		1	1	Bed 005	Hold	EMPTY					
		1	1	Bed 006	Hold	EMPTY					
		1	1	Bed 007	Hold	EMPTY					
		1	1	Bed 008	Hold	EMPTY					
		1	1	Bed 009	Hold	EMPTY					
		1	1	Bed 010	Hold	EMPTY					
		1	1	Bed 011	Hold	EMPTY					
		1	1	Bed 012	Hold	EMPTY					
		1	1	Bed 013	Hold	EMPTY					
		1	1	Bed 014	Hold	EMPTY					
		1	1	Bed 015	Hold	EMPTY					
		1	1	Bed 016	Hold	EMPTY					
		1	1	Bed 017	Hold	EMPTY					
		1	1	Bed 018	Hold	EMPTY					
				Overflow (New)		EMPTY					



- ▶ Last Viewed
- ▶ Favorites
- Home
- ClientPoint
- ResourcePoint
- ShelterPoint
- SkanPoint
- ▶ Reports
- ▶ Admin
- Logout

Client Search

i Please Search the System before adding a New Client.

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

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

Client Number

Enter or scan a Client ID to check that Client in.

Client ID #



- ▶ Last Viewed
- ▶ Favorites
- Home
- ClientPoint
- ResourcePoint
- ShelterPoint
- SkanPoint
- ▶ Reports
- ▶ Admin
- Logout

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

Client Number

Enter or scan a Client ID to check that Client in.

Client ID #

Client Results

	ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	9	Solo, Han	202-20-2020	05/02/1994	Scruffy Nerf Herder	Male		1



- ▶ Last Viewed
- ▶ Favorites
- Home
- ClientPoint
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- ShelterPoint
- SkamPoint
- ▶ Reports
- ▶ Admin
- Logout

Unit Entry Data - (9) Solo, Han

Date In* 10 / 27 / 2019 1 : 09 : 37 PM

Midnight Check In

Unit Name / Number 1 / 1 / Bed 010

Assign Unit

Supplies Given

Locker number

Codes/Notes



Change Clear

Household Members



To include Household members in this Check In, click the box beside each name. Then assign each member a unit. If no unit is available, an Overflow unit will be used. Note: Only members from the same Household may be selected.

(48241) Two Parent Family

(1) Client, Example

Assign Unit

(9) Solo, Han

Assign Unit

Release of Information

Release of Information None

View ROI Details

Default Shelter Assessment

No Shelter Check In Assessment is specified for this Provider

Save

Save & Exit

Exit



View Shelter Inventory

Provider *	HMIS Training (Program) (1064)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>	<input type="button" value="Check Unit Availability"/>
Unit List *	HMIS Test Program	<input type="button" value="Submit"/>			
Type	Emergency Shelter				

Shelter Inventory Information

Unit List - HMIS Test Program

Display Sort By

	Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
		1	1	Bed 001	Hold	EMPTY					
		1	1	Bed 002	Hold	EMPTY					
		1	1	Bed 003	Hold	EMPTY					
		1	1	Bed 004	Hold	EMPTY					
		1	1	Bed 005	Hold	EMPTY					
		1	1	Bed 006	Hold	EMPTY					
		1	1	Bed 007	Hold	EMPTY					
		1	1	Bed 008	Hold	EMPTY					
		1	1	Bed 009	Hold	EMPTY					
	10/27/2019	1	1	Bed 010		(9) Solo, Han	05/02/1994	Male		No	
		1	1	Bed 011	Hold	EMPTY					
		1	1	Bed 012	Hold	EMPTY					
		1	1	Bed 013	Hold	EMPTY					
		1	1	Bed 014	Hold	EMPTY					
		1	1	Bed 015	Hold	EMPTY					
		1	1	Bed 016	Hold	EMPTY					
		1	1	Bed 017	Hold	EMPTY					
		1	1	Bed 018	Hold	EMPTY					
				Overflow (New)		EMPTY					

Demo

End

ff

Checking in multiple clients

ShelterPoint > View Shelter Inventory Type here for Global Search ! ★ ?

▶ Last Viewed **Favorites**

Home

ClientPoint

ResourcePoint

ShelterPoint

SkanPoint

▶ Reports

▶ Admin

Logout

View Shelter Inventory

Provider * HMIS Training (Program) (1064) Search My Provider Clear Check Unit Availability

Unit List * HMIS Test Program ▼ Submit

Type Emergency Shelter

ShelterPoint Dashboard


 Check Client In


 Express Check In


 Check In Reservation


 Check In Referral


 Hold ALL Empty Beds


 Print ID Cards


 Update Confirmation List


 Transmit Today's Check Out List


 View All

Legal Notices

10/1/2020

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

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- The express check in functionality works nearly the same as the regular check in process aside from 3 major differences.
 - You will need to set the date for all clients at the top before searching for/adding clients
 - Each client you add will be added to a list that will be submitted once all clients have been selected by pressing the “Submit List” Button
 - Clients added will be assigned to the first available bed in the bedlist specified

Unit Entry Data

Date In* / / : :

Unit Name / Number (First Unit Available)

Supplies Given

Codes/Notes

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

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

Client Number

Enter or scan a Client ID to add that Client to the Check In List.

Client ID #



Express Check In List

Express Check In List

Name	Date of Birth	Alias

- You can remove clients from the list with the red remove circle or the “Remove Last Entry” button.
- When the list is complete, click “Submit List”

Express Check In List

Express Check In List

Name	Date of Birth	Alias
 (356199) youth hope, test		
 (391899) White, Test	01-05-1980	
 (345616) Tester, Tester		
 (341127) test, test		
 (367097) tes, tester		
 (360827) NN, test	10-20-1988	
 (348382) DOE, TEST M	02-14-1984	
 (373993) Example, Test	11-08-1990	
 (345617) Child, Tester	01-01-2017	
 (349202) Client, Test The, Jr.	01-01-1984	EXAMPLE CLIENT
 (6) Client, Example Child	01-01-2000	
 (8) Client, TAY Example	01-17-2003	

Remove Last Entry
Clear List
Submit List
Exit

Demo

End

ff

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 can be done from the Search box in ShelterPoint, or ClientPoint.
- Once the client record has been created, you can add the record to a bed in ShelterPoint.



- ▶ Last Viewed
- Favorites
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- ShelterPoint
- SkansPoint
- ▶ Reports
- ▶ Admin
- Logout

Client Search

i Please Search the System before adding a New Client.

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

Search

Clear

Add New Client With This Information

Client Number

Enter or scan a Client ID to check that Client in.

Client ID #

Submit

Completing the Client Profile Information

- Most of the data entry for Low Barrier Shelters, beyond documenting when a client stays in the shelter, is done in ClientPoint on the Client Profile page.
- There are two ways you can access the Client Profile page.
 1. Exit ShelterPoint and click ClientPoint. Then search for the client.
 2. Go into the client's shelter stay and click "Jump to Profile"



- ▶ Last Viewed
- ▶ Favorites
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- SkamPoint
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- Logout

Unit Stay Entry Data

Stay Data
Entry / Exit
Release of Information
Service Transactions

Unit Entry Data - (9) Solo, Han

Date In * 10 / 27 / 2019 1 : 09 : 37 PM Midnight Check In

Confirm for Next Day Stay?

Unit Name / Number 1 / 1 / Bed 010 Assign Unit

Supplies Given

Locker number

Codes/Notes


Change Clear

Apply Funds for Service

Funding Sources

Source	Amount
Add Funding Source	
Calculate	Total: \$0.00

Household Members

Household members Click Assign Unit to change the unit for a member. To include additional household members, click Check In Additional Family Members.

(48241) Two Parent Family Check In Additional Family Members

(1) Client, Example Assign Unit

(9) Solo, Han (This Client is already checked in) Assign Unit

Default Shelter Assessment

No Shelter Check In Assessment is specified for this Provider

Delete This Shelter Stay
Jump to Profile
Save
Save & Exit
Exit

Please Confirm

Note: This will close the Unit Stay Entry Data popup and take you to the Client Profile page. Are you sure you want to continue?

Yes
No

Kelly Case Manager III

Data As
Date
Select To ART
Select To Qlik

Group ID	Conf.	Codes/Notes
	No	





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

Client Record

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



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)

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

Demo

End

ff

Low Barrier Assessment

The Low-Barrier Assessment captures the universal data elements requested by the Federal Partners as well as income, non-cash benefits, health insurance, and disabilities that a client may have.



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



Current Living Situation

Start Date*	End Date	Information Date	Current Living Situation
Add			

Street Outreach - Date of Engagement / /   

- The Current Living Situation (CLS) sub-assessment replaces the “Contact” sub-assessment from previous years.
- 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.

Add Recordset - (9) Solo, Han

Current Living Situation

Start Date*	<input type="text" value="10"/> / <input type="text" value="27"/> / <input type="text" value="2019"/>   
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Information Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Current Living Situation	<input type="text" value="-Select-"/> 
If "Other", Specify	<input type="text"/>
Living situation verified by	<input type="text"/> <input type="button" value="Lookup"/> <input type="button" value="Clear"/>
Is client going to have to leave their current living situation within 14 days?	<input type="text" value="-Select-"/>
If 'Yes' to 'Is client going to have to leave their current living situation within 14 days?' answer the following questions.	
Has a subsequent residence been identified?	<input type="text" value="-Select-"/>
Does individual or family have resources or support networks to obtain other permanent housing?	<input type="text" value="-Select-"/>
Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days?	<input type="text" value="-Select-"/>
Has the client moved 2 or more times in the last 60 days?	<input type="text" value="-Select-"/>
Location details	<input type="text"/>



VETERAN INFORMATION

Year entered military service *	Year separated from military service	Branch of the Military	Discharge Status
<input type="button" value="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



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.

- Domestic Violence Questions should be completed for Heads of Households and Adults.
 - Verification is not necessary unless required by your funder.
- For disabilities first record whether the client has a disabling condition (found in the Chronic Homelessness Determination) and then record which disabling condition the client has where applicable.

PROGRAM SPECIFIC DATA ELEMENTS

Domestic Violence Information

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

Client Disability Information

Please Record Whether or Not the Client Has Any of the Following Disability Types:

Alcohol Abuse?	-Select- <input type="button" value="v"/> G
Drug Abuse?	-Select- <input type="button" value="v"/> G
Both Alcohol and Drug Abuse?	-Select- <input type="button" value="v"/> G
Chronic Health Condition?	-Select- <input type="button" value="v"/> G
Developmental Disability?	-Select- <input type="button" value="v"/> G
Living With HIV/AIDS?	-Select- <input type="button" value="v"/> G
Mental Health Problem?	-Select- <input type="button" value="v"/> G
Physical Disability?	-Select- <input type="button" value="v"/> G

- As with disabilities, for income you will first record whether the client is receiving income and then record which source of income where applicable.
- There is also one additional question regarding which source is the primary source of income for clients with more than one income source.

Client Income Information	
Income from Any Source	<input type="text" value="Yes (HUD)"/> G
Total Monthly Income	<input type="text" value="700"/> G
Please Record Whether or Not the Client Has Any of the Following Income Sources:	
Alimony or Other Spousal Support?	<input type="text" value="-Select-"/> G
Child Support?	<input type="text" value="-Select-"/> G
Earned Income?	<input type="text" value="-Select-"/> G
General Assistance (GA)?	<input type="text" value="-Select-"/> G
Pension or retirement income from another job?	<input type="text" value="-Select-"/> G
Private Disability Insurance?	<input type="text" value="-Select-"/> G
Retirement Income From Social Security?	<input type="text" value="-Select-"/> G
Social Security Disability Insurance (SSDI)?	<input type="text" value="-Select-"/> G
Social Security Income (SSI)?	<input type="text" value="-Select-"/> G
Temporary Assistance for Needy Families (TANF)?	<input type="text" value="-Select-"/> G
Unemployment Insurance?	<input type="text" value="-Select-"/> G
VA Non-Service Connected Disability Pension?	<input type="text" value="-Select-"/> G
VA Service Connected Disability Compensation	<input type="text" value="-Select-"/> G
Other Income Source?	<input type="text" value="-Select-"/> G
<i>If yes to "other income source" specify type:</i>	<input type="text"/> G
Primary Income Source	<input type="text" value="-Select-"/> G

- Non-Cash Benefits and Health Insurance are completed in the same way as disabilities in that you record whether the client is receiving any benefit and then record which benefit where applicable.

Client Non-Cash Benefits Information

Non-cash benefit from any source G

Please Record Whether or Not the Client Has Any of the Following Non-Cash Benefits:

Supplemental Nutrition Assistance Program (SNAP)?	<input type="text" value="-Select-"/>	G
Special Supplemental Nutrition Program for WIC?	<input type="text" value="-Select-"/>	G
TANF Child Care Services?	<input type="text" value="-Select-"/>	G
TANF Transportation Services?	<input type="text" value="-Select-"/>	G
Other TANF-Funded Services?	<input type="text" value="-Select-"/>	G
Other Non-Cash Benefit Source?	<input type="text" value="-Select-"/>	G
<i>If yes to "other non-cash benefit source" specify type:</i>	<input type="text"/>	G

Client Health Insurance Information

Covered by Health Insurance G

Please Record Whether or Not the Client Has Any of the Following Types of Health Insurance:

Medicaid?	<input type="text" value="-Select-"/>	G
Medicare?	<input type="text" value="-Select-"/>	G
State Children's Health Insurance Program?	<input type="text" value="-Select-"/>	G
Veteran's Administration (VA) Medical Services?	<input type="text" value="-Select-"/>	G
Employer - Provided Health Insurance?	<input type="text" value="-Select-"/>	G
Health Insurance Obtained Through COBRA?	<input type="text" value="-Select-"/>	G
Private Pay Health Insurance?	<input type="text" value="-Select-"/>	G
State Health Insurance for Adults?	<input type="text" value="-Select-"/>	G
Indian Health Services Program?	<input type="text" value="-Select-"/>	G
Other Health Insurance Type?	<input type="text" value="-Select-"/>	G
<i>If yes to "other health insurance type" specify type:</i>	<input type="text"/>	G

Remember to Click Save & Exit

Client Notes

	Provider	Note Date	Note Preview	Full Note
 	District of Columbia Homeless Management Information System (HMIS)	01/09/2019	Sarah's Notes =Count(if(Date([Entry D...	
 	District of Columbia Homeless Management Information System (HMIS)	01/09/2018	David's notes	

Showing 1-2 of 2

File Attachments

	Date Added	Name	Description	Type	Provider	Added From	
  	01/28/2019	Map.docx	birth certificate	docx	zz - Catholic Charities Shelters (Agency)(closed 2/26/19)	Client Profile	
  	08/26/2015	Client Profile Photo.jpg	Client Photo	jpg	District of Columbia Homeless Management Information System (HMIS)	Client Profile	

Showing 1-2 of 2

Incidents

	Start Date	End Date	Incident	Incident Code	Provider	Ban Site	Staff
No matches.							

Demo

End

ff

Case Contacts

- DHS requires documentation of services, case plans, assessments, and attempts to engage at Low Barrier sites (does not include Severe Weather only locations)
- Clients with long lengths of stay who are not connected to a housing resource should be targeted for services

Documenting Services in the HMIS

Step One: Go the **Service Transactions** 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-

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 **Service Transaction Dashboard**.



Step Two: Click Add Service:

Client - (9) Solo, Han Mass Visibility Update

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

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			

Step Three: Complete all required fields

When done, click Save & Continue

Client Information
Service Transactions

Add Service

▼ **Household Members**

To include Household members for this Service, 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 (Primary Client)

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

Creating User Kelly

Start Date* 10 / 27 / 2019 4 : 33 : 15 PM

End Date 10 / 27 / 2019 4 : 33 : 15 PM

Service Type* Case/Care Management (PH-1000) Look Up

Provider Specific Service -Select-

Save & Continue
Cancel

Step Four: Add Services Notes:

Provide a brief summary of the service provided in the Service Notes section.

Service Provider *	 HMIS Training (Program) (1064)
Creating User	Kelly
Start Date *	10 / 27 / 2019    4 <input type="text"/> : 33 <input type="text"/> : 15 <input type="text"/> PM <input type="text"/>
End Date	10 / 27 / 2019    4 <input type="text"/> : 33 <input type="text"/> : 15 <input type="text"/> PM <input type="text"/>
Service Type *	 Case/Care Management (PH-1000)
Provider Specific Service	-Select- <input type="text"/>
Service Notes	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>

Step Five: Follow Up and Need Information

Similar to goals and action steps, Services 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**), and the date the follow up was actually made (**Completed Follow Up Date**)

Follow Up Information	
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="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/> <input type="text" value="-Select-"/>
Follow Up Made	<input type="text" value="-Select-"/>
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Need Information	
Need Status *	<input type="text" value="Identified"/>
Outcome of Need	<input type="text" value="-Select-"/>
If Need is Not Met, Reason	<input type="text" value="-Select-"/>
<input type="button" value="Save"/> <input type="button" value="Save & Exit"/> <input type="button" value="Exit"/>	

Demo

End

ff

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-

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.



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*

Title

Phone Number

Email Address

Provider* [Search](#) [My Provider](#) [Clear](#)

Start Date* / /

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			

Showing 1-10 of 20

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

Once complete, click “Add 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



The Community Partnership
For The Prevention
of Homelessness

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 [Icons]

Action Step* [Text Area]

Target Date [] / [] / [] [Icons]

Overall Status* -Select- [v]

If Closed, Outcome -Select- [v] [] / [] / [] [Icons]

Projected Follow Up Date [] / [] / [] [Icons]

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

Follow Up User -Select- [v]

Follow Up Made -Select- [v]

Completed Follow Up Date [] / [] / [] [Icons]

Outcome at Follow Up -Select- [v]

Save Action Step Cancel

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 update, 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 *	<input type="text" value="Closed"/>
If Closed, Outcome	<input type="text" value="Achieved"/>

/ /




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

Exiting a client from a bed

As with the check in process, the check out process can also be done for 1 client at a time or multiple clients at once.

Shelter Inventory Information



The Community Partnership
For The Prevention
of Homelessness

Unit List - HMIS Test Program

Display Sort By

	Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
		1	1	Bed 001	Hold	EMPTY					
		1	1	Bed 002	Hold	EMPTY					
		1	1	Bed 003	Hold	EMPTY					
		1	1	Bed 004	Hold	EMPTY					
		1	1	Bed 005	Hold	EMPTY					
		1	1	Bed 006	Hold	EMPTY					
		1	1	Bed 007	Hold	EMPTY					
		1	1	Bed 008	Hold	EMPTY					
		1	1	Bed 009	Hold	EMPTY					
	10/27/2019	1	1	Bed 010		(9) Solo, Han	05/02/1994	Male		No	
		1	1	Bed 011	Hold	EMPTY					
		1	1	Bed 012	Hold	EMPTY					
		1	1	Bed 013	Hold	EMPTY					
		1	1	Bed 014	Hold	EMPTY					
		1	1	Bed 015	Hold	EMPTY					
		1	1	Bed 016	Hold	EMPTY					
		1	1	Bed 017	Hold	EMPTY					
		1	1	Bed 018	Hold	EMPTY					
				Overflow (New)		EMPTY					



Unit Exit Data - (9) Solo, Han

Date Out* 10/27/2019 3:10:37 PM

Unit Name / Number Bed 010

Supplies Returned Yes No

Apply Funds for Service

Funding Sources

Source

Amount

Add Funding Source

Calculate Total: \$0.00

Household Members

No Household Members were originally associated.

Default Shelter Assessment

No Shelter Check Out Assessment is specified for this Provider

Save

Save & Exit

Exit

Demo

End

ff



Exiting multiple clients from beds

To check out multiple clients at the same time, you will also access the Unit List for the shelter.

Then you will scroll to the very bottom and on the left-hand side press the "Transmit Today's Checkout List" button.

Unit List - HMIS Test Program

Display: All Beds | Sort By: Floor | Ascending | Sort

Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
	1	1	Bed 001	Hold	EMPTY					
10/27/2019	1	1	Bed 002		(349202) Client, Test The, Jr.	01/01/1984	Male	2734895	No	
	1	1	Bed 003	Hold	EMPTY					
	1	1	Bed 004	Hold	EMPTY					
	1	1	Bed 005	Hold	EMPTY					
	1	1	Bed 006	Hold	EMPTY					
	1	1	Bed 007	Hold	EMPTY					
	1	1	Bed 008	Hold	EMPTY					
10/27/2019	1	1	Bed 009		(1) Client, Example	05/27/1940	Male	2734895	No	
10/27/2019	1	1	Bed 010		(9) Solo, Han	05/02/1994	Male		No	
	1	1	Bed 011	Hold	EMPTY					
	1	1	Bed 012	Hold	EMPTY					
	1	1	Bed 013	Hold	EMPTY					
	1	1	Bed 014	Hold	EMPTY					
	1	1	Bed 015	Hold	EMPTY					
	1	1	Bed 016	Hold	EMPTY					
	1	1	Bed 017	Hold	EMPTY					
	1	1	Bed 018	Hold	EMPTY					
			Overflow (New)		EMPTY					

Print Unit List | Start Express Check In | Hold ALL Empty Units | Release ALL HELD Units

Reservations for Unit List - HMIS Test Program

Arrival Date	Name	Date of Birth	Gender	Group ID
No matches.				

Add Reservation

Outstanding Referrals - HMIS Training (Program) (1064) - 0 total Check Unit Availability

Referral Date	Name	Ranking	Need Type	Referred By	Date of Birth	Gender	Group ID
No matches.							

Return to ShelterPoint Dashboard | Print ID Cards | Update Confirmation List | **Transmit Today's Check Out List**



- Select which clients will be checked out by clicking the checkbox next to their names or pressing the “Check All” button.
- Set the date of exit by pressing the “Set Dates” button
- Click “Check Out”

Check Out List

Current Check Out Date 10 / 27 / 2019 3 : 15 : 24 PM Set Dates

Check Out	Client ID	Client Name	Group ID	Unit	Date Out / Reason For Leaving / Destination	Supplies Returned
<input type="checkbox"/>	349202	Client, Test The, Jr.	2734895	Bed 002	10 / 27 / 2019 3 : 15 : 24 PM	<input type="checkbox"/>
<input type="checkbox"/>	1	Client, Example	2734895	Bed 009	10 / 27 / 2019 3 : 15 : 24 PM	<input type="checkbox"/>
<input type="checkbox"/>	9	Solo, Han		Bed 010	10 / 27 / 2019 3 : 15 : 24 PM	<input type="checkbox"/>

Check All Uncheck All

Future Check Out List

Future Check Out Date 10 / 27 / 2019 3 : 15 : 24 PM Set Dates

Check Out	Client ID	Client Name	Group ID	Unit	Date Out / Reason For Leaving / Destination	Supplies Returned
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Check All Uncheck All

Check Out Cancel

Demo

End

ff

Common Data Entry Errors

ShelterPoint Edition

- Adding the incorrect client to a bed
- Adding a client to the wrong bed

Adding the Wrong Client to a bed

Sometimes we choose the wrong client record when checking clients into ShelterPoint.

In this case, they should not have a Shelter Stay attributed to their record.

We want to DELETE this Shelter Stay, not just check them out of the bed.

Unit List - HMIS Test Program										
Display <input type="button" value="All Beds"/> Sort By <input type="button" value="Floor"/> <input type="button" value="Asce"/>										
	Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	C
	10/27/2019	1	1	Bed 001		(8) Client, TAY Example	01/17/2003	Female		M
	10/27/2019	1	1	Bed 002		(349202) Client, Test The, Jr.	01/01/1984	Male	2734895	M
	10/27/2019	1	1	Bed 003		(6) Client, Example Child	01/01/2000	Male		M
	10/27/2019	1	1	Bed 004		(345617) Child, Tester	01/01/2017			M
	10/27/2019	1	1	Bed 005		(373993) Example, Test	11/08/1990	Male		M
	10/27/2019	1	1	Bed 006		(348382) DOE, TEST M	02/14/1984	Female		M
	10/27/2019	1	1	Bed 007		(360827) NN, test	10/20/1988	Female		M
	10/27/2019	1	1	Bed 008		(367097) tes, tester				M
	10/27/2019	1	1	Bed 009		(1) Client, Example	05/27/1940	Male	2734895	M
	10/27/2019	1	1	Bed 010		(9) Solo, Han	05/02/1994	Male		M
	10/27/2019	1	1	Bed 011		(341127) test, test				M
	10/27/2019	1	1	Bed 012		(345616) Tester, Tester		Male		M
	10/27/2019	1	1	Bed 013		(391899) White, Test	01/05/1980	Male		M
	10/27/2019	1	1	Bed 014		(356199) youth hope, test				M
		1	1	Bed 015	Hold	EMPTY				
		1	1	Bed 016	Hold	EMPTY				
		1	1	Bed 017	Hold	EMPTY				
		1	1	Bed 018	Hold	EMPTY				
				Overflow (New)		EMPTY				

Print Unit List Start Express Check In Hold ALL Empty Units F



In this Case, I entered Client 8 into my bed list when I really meant to add a different client record.

I click on their name in the Unit List to get to the Unit Stay Entry Data pop-up.

I then click “Delete This Shelter Stay”

Unit Stay Entry Data

Stay Data | Entry / Exit | Release of Information | Service Transactions

Unit Entry Data - (8) Client, TAY Example

Date In*	10 / 27 / 2019	3	: 28	: 16	PM	Midnight Check In
Confirm for Next Day Stay?	No					
Unit Name / Number	1 / 1 / Bed 001					Assign Unit
Supplies Given	<input type="text"/>					
Locker number	<input type="text"/>					
Codes/Notes	<input type="text"/>					
						
Change Clear						

Apply Funds for Service

Funding Sources

Source	Amount
<input type="button" value="Add Funding Source"/>	<input type="button" value="Calculate"/> Total: \$0.00

Household Members

This Client is not a member of any Households.

Default Shelter Assessment

No Shelter Check In Assessment is specified for this Provider



In this Case, I entered Client 8 into my bed list when I really meant to add a different client record.

I click on their name in the Unit List to get to the Unit Stay Entry Data pop-up.

I then click “Delete This Shelter Stay”

ServicePoint will ask “Are you sure you want to delete this?”

Click “Delete” to complete deleting the shelter stay.

Unit Stay Entry Data

Stay Data | Entry / Exit | Release of Information | Service Transactions

Unit Entry Data - (8) Client, TAY Example

Date In* 10 / 27 / 2019 : 28 : 16 PM

Confirm for Next Day Stay? No

Unit Name / Number 1 / 1 / Bed 001

Supplies Given

Locker number

Codes/Notes

Apply Funds for Service

Funding Sources

Source Amount

Total: \$0.00

Household Members

Default Shelter Assessment

No Shelter Check In Assessment

Delete Shelter Stay

Note: This shelter stay is shared by other providers in your tree. This shelter stay should not be deleted except in extreme circumstances.

Are you sure you want to delete this Shelter Stay (#2734936)?

(Note: The only time you should need to delete this info is when there is bad data or the wrong client is checked into the shelter.)

Adding a client to the wrong bed

Sometimes a client is added to the wrong bed, or the client moves during their stay.

You do not want to exit the client and then re-add them since it is the same stay in shelter.

You want to only change the bed they are in on the unit list.

Unit List - HMIS Test Program												
		Display	All Beds	Sort By	Floor	Ascending						Sort
	Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes	
		1	1	Bed 001	Hold	EMPTY						
	10/27/2019	1	1	Bed 002		(349202) Client, Test The, Jr.	01/01/1984	Male	2734895	No		
	10/27/2019	1	1	Bed 003		(6) Client, Example Child	01/01/2000	Male		No		
	10/27/2019	1	1	Bed 004		(345617) Child, Tester	01/01/2017			No		
	10/27/2019	1	1	Bed 005		(373993) Example, Test	11/08/1990	Male		No		
	10/27/2019	1	1	Bed 006		(348382) DOE, TEST M	02/14/1984	Female		No		
	10/27/2019	1	1	Bed 007		(360827) NN, test	10/20/1988	Female		No		
	10/27/2019	1	1	Bed 008		(367097) tes, tester				No		
	10/27/2019	1	1	Bed 009		(1) Client, Example	05/27/1940	Male	2734895	No		
	10/27/2019	1	1	Bed 010		(9) Solo, Han	05/02/1994	Male		No		
	10/27/2019	1	1	Bed 011		(341127) test, test				No		
	10/27/2019	1	1	Bed 012		(345616) Tester, Tester		Male		No		
	10/27/2019	1	1	Bed 013		(391899) White, Test	01/05/1980	Male		No		
	10/27/2019	1	1	Bed 014		(356199) youth hope, test				No		
		1	1	Bed 015	Hold	EMPTY						
		1	1	Bed 016	Hold	EMPTY						
		1	1	Bed 017	Hold	EMPTY						
		1	1	Bed 018	Hold	EMPTY						
				Overflow (New)		EMPTY						

Print Unit List Start Express Check In Hold ALL Empty Units Release ALL HELD Units



Unit Stay Entry Data

Stay Data

Entry / Exit

Release of Information

Service Transactions

Unit Entry Data - (391899) White, Test

Date In*

10 / 27 / 2019 3 : 28 : 16 PM

Midnight Check In

Confirm for Next Day Stay?

No

Unit Name / Number

1 / 1 / Bed 013

Assign Unit

Supplies Given

Locker number

Codes/Notes



Change

Clear

Apply Funds for Service

Funding Sources

Source

Amount

Add Funding Source

Calculate

Total: \$0.00

Household Members

This Client is not a member of any Households.

Default Shelter Assessment

No Shelter Check In Assessment is specified for this Provider

Delete This Shelter Stay

Jump to Profile

Save

Save & Exit

Exit



Unit Stay Entry Data

Stay Data | **Entry / Exit** | **Release of Information** | **Service Transactions**

Unit Entry Data - (391899) White, Test

Date In *	10 / 27 / 2019 3 : 28 : 16 PM	<input type="button" value="Midnight Check In"/>
Confirm for Next Day Stay?	<input type="button" value="No"/>	
Unit Name / Number	1 / 1 / Bed 013	<input type="button" value="Assign Unit"/>
Supplies Given	<input type="text"/>	
Locker number	<input type="text"/>	
Codes/Notes	<input type="text"/>	
		<input type="button" value="Change"/> <input type="button" value="Clear"/>

Apply Funds for Service

Source	Amount
<input type="button" value="Add Funding Source"/>	
HMIS Test Program	
Bed <input type="text" value="-Select-"/>	
<input type="button" value="Calculate"/>	Total: \$0.00

This Client is not a member of any Households.

Default Shelter Assessment

No Shelter Check In Assessment is specified for this Provider



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.



Added: Timely log in



Added: Successful
completion of training



Added: Annual
Security Training
Requirement



Added: Recertification
Training



Added: HMIS Training
as Remedial Training

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**

- 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!

Additional Resources



Thanks for participating!

Questions?

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