Mini Guide: Snapshot Management

Basic guide to help HMIS users create and update snapshots.

Updated 1/6/17

What is a snapshot?

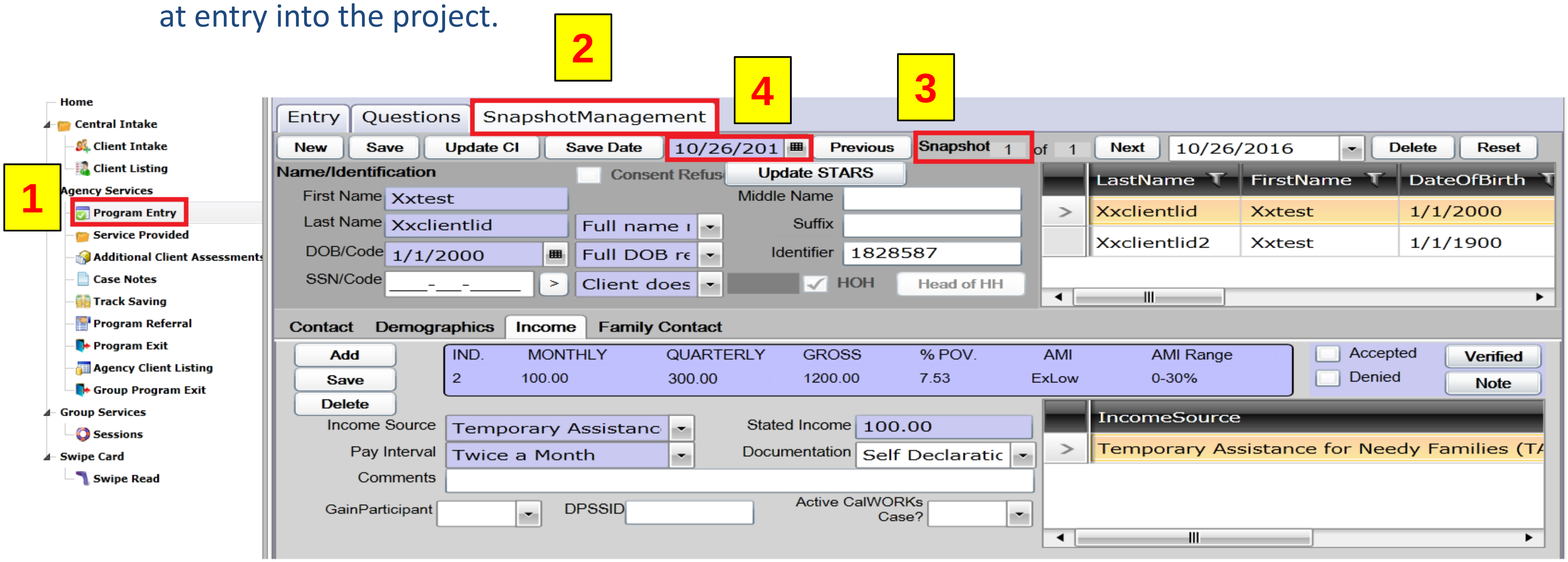
A snapshot is a client's situation at a particular point in time.

- Includes demographics, income, and household member information.
- Is specific to the project they are created for, and cannot be updated by other agencies.
- Snapshot data is used for reports.
- Can be manually updated for each change in a client's situation e.g. Incorrect data.
- **When a new snapshot is created, data is pulled from the Client Intake page.**

Snapshot at Entry

A snapshot is automatically created when a client is enrolled in a project.

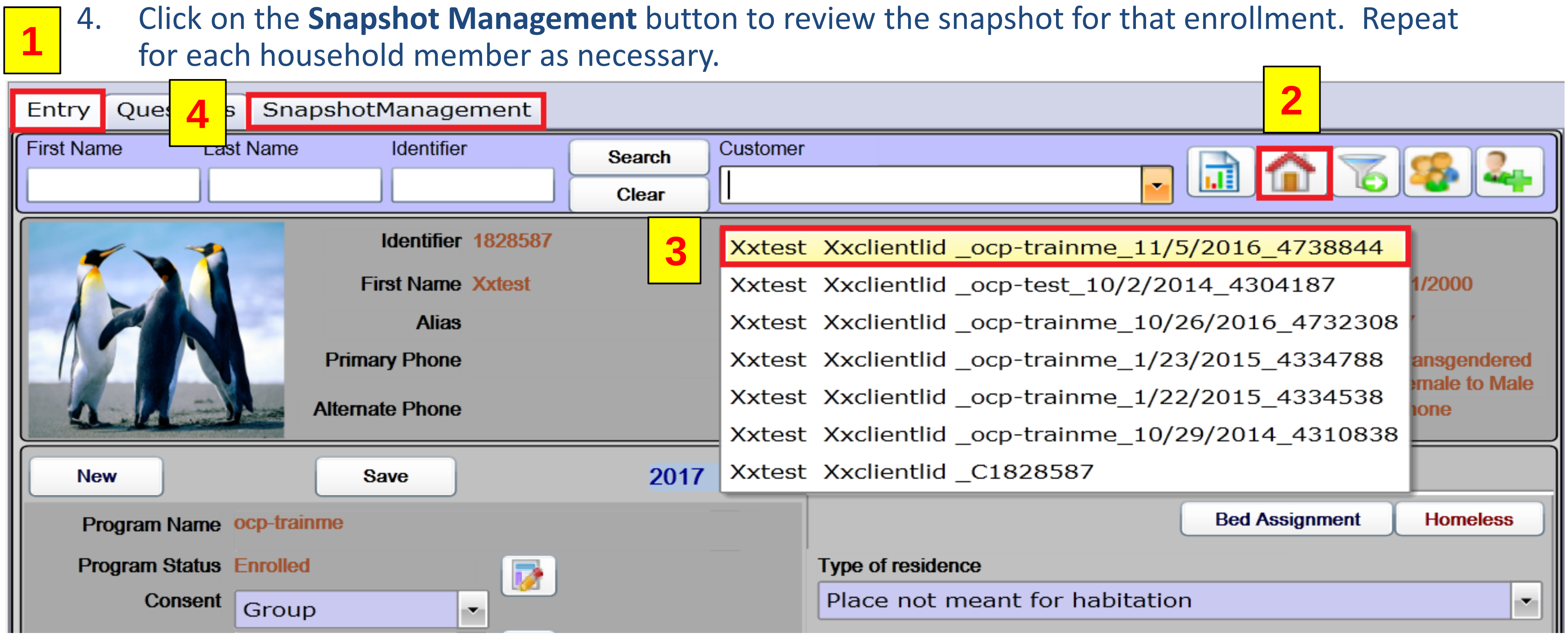
1. Click on **Program Entry**.
2. Click on **Snapshot Management** Tab.
3. The entry snapshot for the project is Snapshot 1.
4. Confirm that the **Snapshot Date** matches the client's Program Entry date.
5. Verify all information on the Demographics and Income tabs accurately portray client's situation at entry into the project.



Review Snapshots for Additional Housing Members

Snapshots are specific to the enrollment they were created for. Because of this, the snapshots for each member of a household must be reviewed as well.

1. Click on the **Entry** tab.
2. Click on the **Shrink List to Current Household** button to see the enrollments for all clients in the household.
3. Select the enrollment you would like to review the snapshot for.
4. Click on the **Snapshot Management** button to review the snapshot for that enrollment. Repeat for each household member as necessary.



When to Add Additional Snapshots

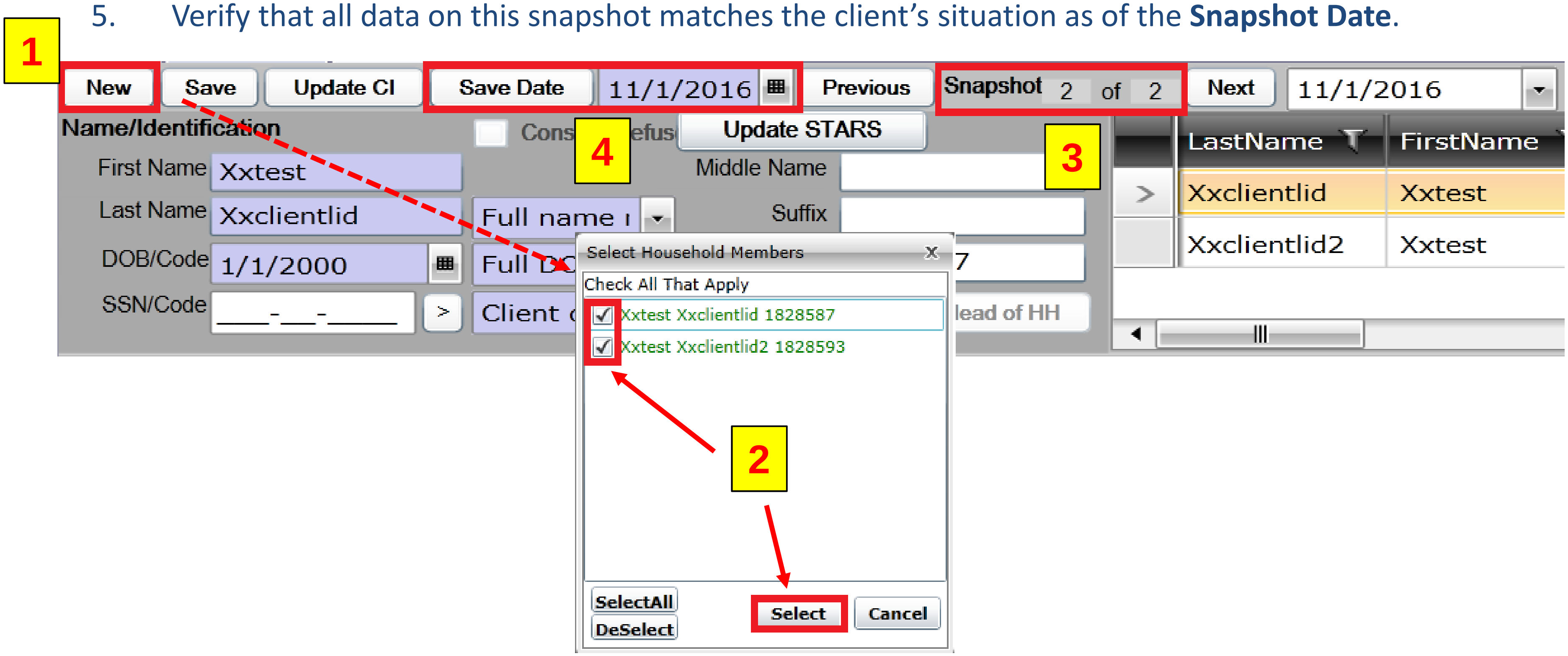
In addition to entry and exit snapshots, new snapshots should be created in the following circumstances:

- There is an income change for anyone in the household.
- A client is added or removed from the household.
- If an enrollment is active for one year or longer, a new snapshot must be created, no more than 30 days before or after the anniversary of the **Program Entry date**, as part of the Annual Assessment.

Adding a New Snapshot

To add a new snapshot:

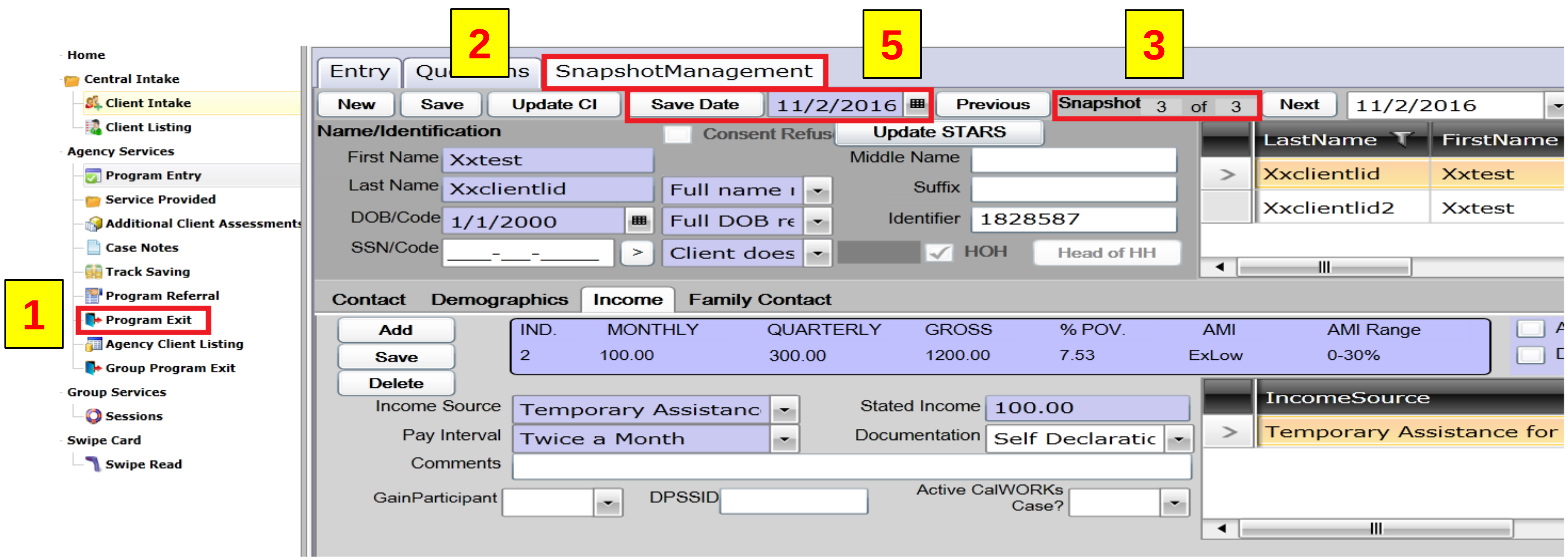
1. Click on the **New** button on the **Snapshot Management** tab.
2. Make sure the check boxes for all clients are checked to add a snapshot to all members of the household. Click on **Select**.
3. The total number of snapshots in the enrollment will increase by 1.
4. Update the **Snapshot Date** to match the date when this data first applies, and click on **Save Date** (i.e. The date the client's income increased, the date of the Annual Assessment, etc).
5. Verify that all data on this snapshot matches the client's situation as of the **Snapshot Date**.



Snapshot at Exit

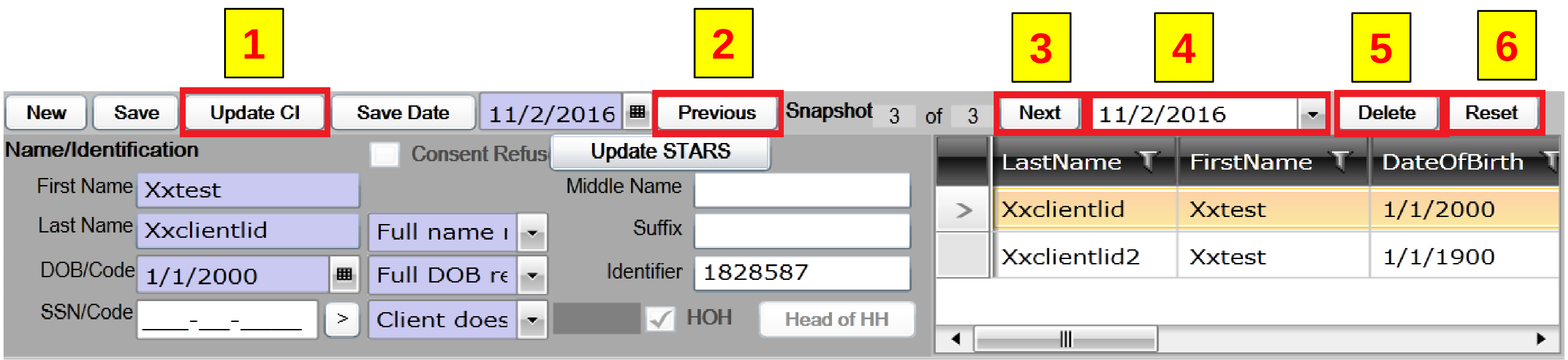
A snapshot is automatically created when a user clicks on the **Begin Exiting Client from Program** button on the **Program Exit** page.

1. Click on **Program Exit**.
2. Click on the **Snapshot Management** tab.
3. The exit snapshot is the last snapshot in the enrollment. The number of snapshots should have increased by 1.
4. Verify that all data on the snapshot accurately portrays the client's situation at program exit.
5. Update the **Snapshot Date** to match the client's **Program Exit Date**, and click on **Save Date**. Be sure to review the snapshots for the other household members as well.



Additional Functions on Snapshot Management Page

1. **Update Central Intake**: Only enabled if the last snapshot in the enrollment is being modified. It will update the Client Intake page with the data on this snapshot.
2. **Previous**: Changes to previous snapshot.
3. **Next**: Changes to next snapshot.
4. **Date dropdown**: User can select the snapshot to view based on the Snapshot Date.
5. **Delete**: Deletes the snapshot.
6. **Reset**: Deletes all snapshots and creates one new snapshot. Using this button is not recommended in most cases, as all snapshots that are deleted will need to be recreated.



Questions?

Contact your Agency Administrator.