



# 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.

The screenshot shows the OCHMIS system interface. On the left is a navigation menu with 'Program Entry' highlighted (1). The main content area has tabs for 'Entry', 'Questions', and 'SnapshotManagement' (2). The 'SnapshotManagement' tab is active, showing a 'New' button, 'Save', 'Update CI', 'Save Date' (10/26/2016) (4), 'Previous', 'Snapshot 1 of 1', 'Next', 'Delete', and 'Reset' buttons. The 'Name/Identification' section includes fields for First Name (Xxtest), Last Name (Xxclientlid), DOB/Code (1/1/2000), and SSN/Code. The 'Income' tab is selected, showing a table with columns: IND., MONTHLY, QUARTERLY, GROSS, % POV., AMI, and AMI Range. The table contains one row with values: 2, 100.00, 300.00, 1200.00, 7.53, ExLow, 0-30%. The 'Income Source' is 'Temporary Assistance for Needy Families (TANF)'. Other fields include 'Stated Income' (100.00), 'Documentation' (Self Declaratic), and 'Active CalWORKs Case?'.

# 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.

The screenshot shows the OCHMIS system interface. At the top, there are tabs for 'Entry', 'Questions', and 'SnapshotManagement'. The 'Entry' tab is selected. Below the tabs, there are search filters for 'First Name', 'Last Name', and 'Identifier', along with a 'Search' button and a 'Clear' button. To the right, there is a 'Customer' dropdown menu and a 'Shrink List to Current Household' button (represented by a house icon). Below the search filters, there is a list of enrollments. The first enrollment is highlighted in red and has a yellow box with the number '3' next to it. The enrollment details are: Identifier 1828587, First Name Xxtest, Alias, Primary Phone, and Alternate Phone. Below the list, there are buttons for 'New' and 'Save', and a '2017' label. At the bottom, there are fields for 'Program Name' (ocp-trainme), 'Program Status' (Enrolled), 'Consent' (Group), 'Type of residence' (Place not meant for habitation), 'Bed Assignment', and 'Homeless'.



## 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**.

The screenshot shows the OCHMIS Snapshot Management interface. At the top, there are buttons for 'New', 'Save', 'Update CI', 'Save Date' (set to 11/1/2016), 'Previous', 'Snapshot 2 of 2', 'Next', and another 'Save Date' (set to 11/1/2016). Below these are input fields for 'Name/Identification', 'First Name' (Xxtest), 'Last Name' (Xxclientlid), 'DOB/Code' (1/1/2000), and 'SSN/Code'. There are also buttons for 'Update STARS' and 'Client'. A dialog box titled 'Select Household Members' is open, showing a list of clients with checkboxes. Two clients are checked: 'Xxtest Xxclientlid 1828587' and 'Xxtest Xxclientlid2 1828593'. The 'Select' button in the dialog is highlighted with a red box. A red dashed arrow points from the 'New' button to the 'Save Date' button.

# Snapshot at Exit

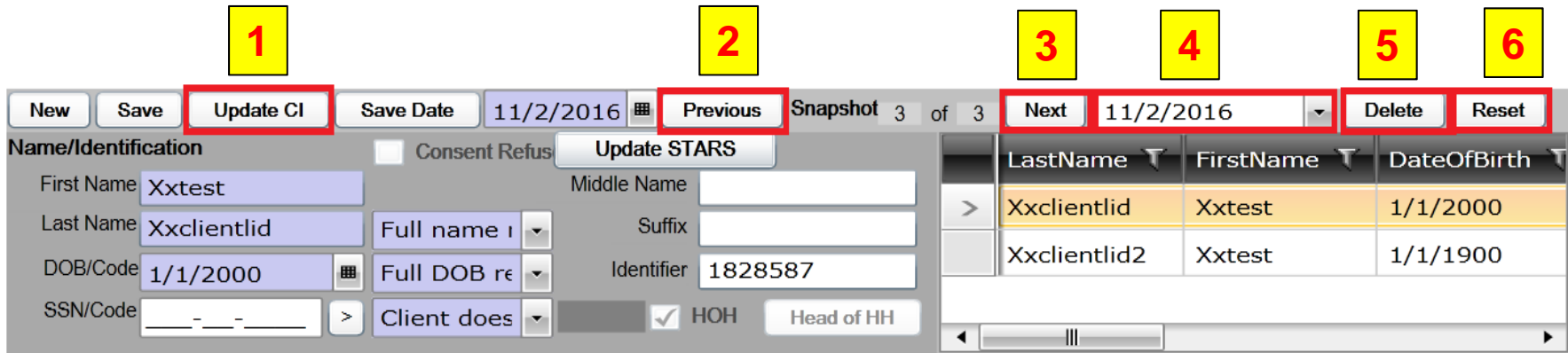
A snapshot is automatically created when a user clicks on the **Begin Exiting Client from Program** button on the **Program Exit** page.

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.

The screenshot displays the OCHMIS system interface. On the left sidebar, the 'Program Exit' option is highlighted with a red box and a yellow callout '1'. The main content area shows the 'SnapshotManagement' tab selected, with a yellow callout '2' pointing to it. The 'Save Date' button and the date field '11/2/2016' are highlighted with a red box and a yellow callout '5'. The 'Snapshot 3 of 3' indicator is highlighted with a red box and a yellow callout '3'. The form contains fields for Name/Identification, Contact, Demographics, Income, and Family Contact. The Income table shows data for a client with a monthly income of 100.00 and a gross income of 1200.00. The Income Source is 'Temporary Assistance'.

# 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.



The screenshot shows the Snapshot Management Page interface. The top navigation bar includes buttons for 'New', 'Save', 'Update CI' (callout 1), 'Save Date' (11/2/2016), 'Previous' (callout 2), 'Snapshot 3 of 3', 'Next' (callout 3), a date dropdown (11/2/2016, callout 4), 'Delete' (callout 5), and 'Reset' (callout 6). Below the navigation bar, there are input fields for 'Name/Identification' (First Name: Xxtest, Last Name: Xxclientlid, DOB/Code: 1/1/2000, SSN/Code: \_\_\_-\_\_-\_\_\_), 'Consent Refus', 'Update STARS', 'Middle Name', 'Suffix', 'Identifier' (1828587), and 'Client does' (checked). A table on the right displays client information:

LastName	FirstName	DateOfBirth
Xxclientlid	Xxtest	1/1/2000
Xxclientlid2	Xxtest	1/1/1900





# Questions?

Contact your Agency Administrator.