

# HMIS Part 2 – Version 6 Training Materials

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## HMIS Part 2 Training - Getting Started

Check out this [overview of HMIS V6!](#)

### Log In

The HMIS Version 6 URL is ochmisv6.esserver.com

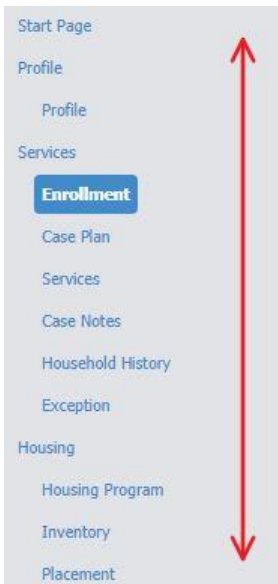
After you log in - if you are a member of multiple user groups, you will select which user group to use and click start. Your user groups will remain the same as they were in Version 5.5.

HMIS version 6 can be accessed from:

- Chrome
- Firefox
- Microsoft Edge

Tips:

- Navigation Tree (Left side of the page): Shows you the pages you have access to. These pages will tie to your role, so depending on what role(s) you have – some of these pages may or may not be available.



- Tabs across the page: These tabs provide access to critical processes that are required to enter data. For example: creating an enrollment for services on the Application Tab.



- The Application List tab is available on all Client pages so you can easily switch between enrollments when needed.

- Access help on each page and tab



- The Help button lists written instructions for the page.
- The Video button provides a recorded video of the page.
- Click the icon again to close the window

Icons:

- Edit = 
- Delete = 
- Lock = 

Note: If you put your mouse over the icon, it will also tell you what that icon is.

## HMIS Part 2 Training - Adding a New Client Record

Check out this [video](#) for more information on creating/adding a client record.

### Search for Client Record

**Look-Up**

First Name      Last Name      Account/CustomerID      SSN

Before creating a new client record we must make sure the client does not already have a record in HMIS. Do this for every new client you enroll to make sure you are not creating a duplicate client record.

If you are looking for a client whose name has multiple spellings, such as Britney/Brittany/Britney, make sure to do a “soft” search by only searching for a few letters in your client’s name. In this example, let’s say your client’s name is Britney Spears.

To see if Britney already has a record, try searching “Brit” in the First Name box and “Sp” in the Last Name box. The last agency Britney received services from may not have checked the spelling of her name and could have entered her as “Brittany Spears.” Compare your client’s last four digits of their SSNs and their dates of birth with any possible matching records.

Matching Records will display in the POPUP select window. Select the client you're searching for and click select to view record.

## My Cases

When a client is part of your caseload you can find them easily in the My Cases Quick Access Menu to search for them. The My Cases tab is available on the right hand side as a vertical tab on most pages.

### MY CASES

Program: AS1Coordinate      Case Worker: TRAderycke       Active     

**Applications**

....	First Name	Last Name	Date Of Birth	Last4SSN	Identifier	Program	Status	Date Entered	Date Exit
<input type="button" value="Locate"/>	xxerin	xxtest	9/8/1945			AS1Coordinate	Enrollment	8/29/2017	
<input type="button" value="Locate"/>	xxother	xxtest	9/8/1977			AS1Coordinate	Enrollment	8/29/2017	

1 - 2 of 2 items

Profile Listing  
Application List  
My Cases

If Client is already enrolled, use the My Cases Quick Access Menu to search.

- Click my cases table - In Quick Access Menu, select 'Program' and 'Case Worker' to search for your client. Once the matches display in grid, click 'Locate' to view the client's record.

**TIP:** My Cases tab is available on all client pages and your Search results will remain until you change pages

## Add New Client Record

Use the Enrollment page to add a new or edit an existing Client Record. Use the search bar at the top of page to search for an existing Client Record.

Engenuity v6.0.0

Start Page

Profile

Profile

Services

**Enrollment**

Case Plan

Services

Case Notes

Household History

Enrollment

Look-Up

First Name Last Name Account/CustomerID SSN Identifier

Account Profile HH Contacts Applications HH Members Assessments Income Documents

ACCOUNT PROFILE **+ ADD**

If the client does not exist in HMIS click on the on the Enrollment Page -> Account Profile tab to add a new Client Record.

**Create Account**

First Name \* Last Name \*

John Smith

Date Of Birth (Format: mm/dd/yyyy) SSN

9/14/1970 123-12-1234

**Sign Up** **Close**

NOTE: If the account already exists, matching Client Records will be displayed in the Account popup window. Select the record you want to edit and then click Select to view/edit the account profile.

#### OPTIONAL - Add Contact Information

Enter the Client's contact information and Last Known Permanent Address (the last non-shelter residence the client lived at for 90 days or more) here. This data can be updated after project enrollment if needed.

**CONTACT INFORMATION** [Pencil Icon]

PRIMARY PHONE

ALTERNATE PHONE

ACCOUNT ID

LAST KNOWN PERMANENT ADDRESS

NOTE + ADD

### Contact Information & Address

#### CONTACT INFORMATION

Primary Phone:  Phone Type:   Leave MSG

Alternate Phone:  Phone Type:   Leave MSG

Email:  JSmith100570@TMP.com Contact Preference:

#### LAST KNOWN PERMANENT ADDRESS

Address:  Enter your address County:  Unit Type:  Unit Number:

Check if the mailing address is different from the address above

Save Close

Click on the pencil icon next to “Contact Information” to edit/enter in Client's data.

- If the client’s mailing address is different than resident address, check the box and enter the client’s mailing address in the new fields that appear.
- To view address in Google Maps - click Map button next to Contact Information
- To view Address History - click History button next to Address.

**OPTIONAL - Add Client Notes**

Notes can be added at any point during the client’s enrollment and will be available on the Account Profile tab. Use this section for information that other providers working with your client should know, such as allergy information or language preferences.

John Smith [200]

ACCOUNT ID

EMAIL

CONTACT INFORMATION

PRIMARY PHONE

ALTERNATE PHONE

ACCOUNT ID

LAST KNOWN PERMANENT

NOTE + ADD

### Add Note

Household

Subject \*  Member:  Note By:  TRAmlee

Note Type:  Note Date:  9/6/2017 Expire Date:

Note

Save Close

Click 'ADD' next to Note - a POPUP window will appear.

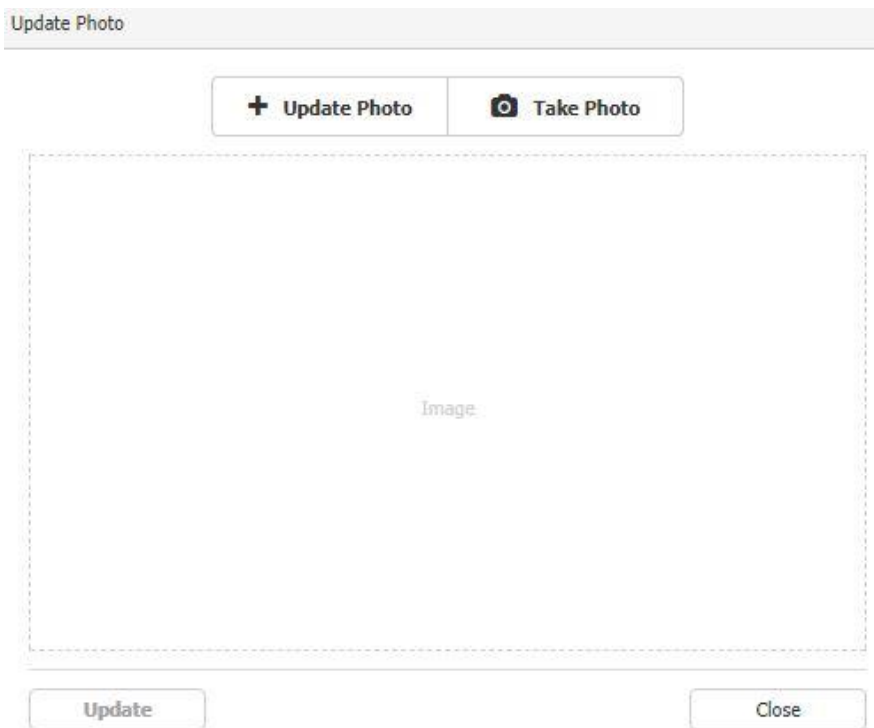
- Check Household if the note applies to entire household. If not, select the member in the Member dropdown.
- After you enter in the notes, it will displays on the screen and may be edited or deleted when needed.
- If you select 'Alert' for Note Type, an Alert will cause the client image border to flash at the top of the page. Alert Notes will be displayed on **ALL** Client pages.
- Notes will be displayed chronologically with newest note first.

### OPTIONAL - Upload or Take Client Photo

If desired, a photo can be added to a client's record on the Enrollment page, and can be updated at any time during the client's enrollment.



Click on the icon next to Name at the top right of the screen. Update Photo POPUP window will appear.



Either click Update Photo to upload a photo from your local computer or mobile device, OR click Take Photo to take a photo of the client with your mobile or webcam.

## HMIS Part 2 Training - Creating a Client Enrollment

For more information on how to create an enrollment for a client, check out [this video!](#)

## Applicant

### APPLICANT INFORMATION

Program* TRAHMIS_TransitionalHousing	Domains <input type="checkbox"/> HOPWA Financial Assistance <input type="checkbox"/> HOPWA Services		
Household Member Applying* Johnnie Tester			
Entry Date* 9/18/2017	Program Status Applied	Consent System	Case Manager TRAMlee
Location	Referred By		
Comments			

Enroll clients into a project on the Applications tab.

To enroll a client:

1. Click Add, and then enter entry information on the Application popup window.
2. Select the project name from the Program dropdown.
3. Project Start Date and Case manager fields should auto populate to Today's date and the account User's ID. Update both fields if necessary.
4. In the Household Member Applying dropdown, select the Head of Household. All additional household members will be added on the HH Members tab.
5. Select the Domain (previously program component) the client should be served under. The domains are usually the funding sources associated with the project. Some domains may be checked by default.
6. The Consent field should be 'System' for all clients that have signed the Client Consent form. If the client has not signed the Client Consent form, the Consent field should be Organization.

Different project types use Project Start Date differently, to address the difference in meaning associated with “starting” residential, service, and permanent housing projects. Below are descriptions of Project Start Date by project type.

- Street Outreach: Date of first contact with the client.
- Emergency Shelter: Night the client first stayed in the shelter. Night by night shelters will have a project start date and will allow clients to re-enter as necessary without “exiting” and “restarting” for each stay for a specified period.
- Transitional Housing: Date the client moves into the residential project (i.e. first night in residence).
- Permanent Housing, including Rapid Re-Housing: Date following application that the client was admitted into the project. To be admitted indicates the following factors have been met: 1) Information provided by the client or from the referral indicates they meet the criteria for admission; 2) The client has indicated they want to be housed in this project; 3) The client is able to access services

and housing through the project. The expectation is the project has a housing opening (on-site, site-based, or scattered-site subsidy) or expects to have one in a reasonably short amount of time.

- Other Service Projects, including but not limited to services only, day shelter, homelessness prevention, coordinated assessment, health care: The date the client first began working with the project and generally received the first provision of service.

NOTE: The Application tab includes buttons to delete a client's enrollment, as well as switching an enrollment from one client to another.

xxerin xxtest [ 9/8/1945 ]

TRAHMIS\_ServicesOnly 9/18/2017

PROGRAM STATUS	Enrollment	OPERATION YEAR	2017	LOCATION		CONSENT	System
CASE MANAGER	TRAderycke	EXIT DATE		REFERRED BY			
COMMENTS							
ADDRESS							

## HMIS Part 2 Training - Entering Demographic Information & Adding Household Members

Check out [this video](#) for more information on how to edit demographic information for all members of a household.

Enter demographic data and add additional household members on the HH Members tab. If the client has previously entered a project, most demographics data will be pulled automatically from the most recent application. It should be examined for accuracy and updated where needed.

HOUSEHOLD MEMBERS + ADD SELECT ✓ EXIT

Applicant: xxerin xxtest  
TRAHMIS\_PH\_PSH [2008675]

Verified: No  
Exited: No

Household Information

Household Type: Households without children

Household Size: 2 Member(s)

Housing Status: Category 1 - Homeless

xxerin xxtest [ 2008969 ]

Entry Date: 9/18/2017

MARITAL STATUS	Single	GENDER	Female	DOB (AGE)	9/8/1945 (72)	LAST 4 SSN	
RESIDENCY STATUS		MEDICAL INSURANCE	No	DISABLING CONDITION	No	VETERAN	No
EDUCATION	No Schooling Completed	1ST LANGUAGE		2ND LANGUAGE		INTERPRETER NEEDED	No
ETHNICITY	Non-Hispanic/Non-Latino	RACE	White				

To add demographic information, click the Edit button next to the client's name. The Change Head of Household button can be used to select a new Head of Household, and also to update the relation status for all household members.



**Edit Member**

Entry Date \*  Household Type  Household Size \*  Housing Status

**BASIC INFORMATION**

First Name \*  Middle Name  Last Name \*  Suffix  DOB \*  Age

SSN  Gender  Disabling Condition  Veteran

**ADDITIONAL INFORMATION**

Education  Marital Status  Ethnicity  Medical Insurance

1st Language  2nd Language   Interpreter Needed

Residency Status   Deceased

Identifier

**RACE (Choose As Many As Applied)**

Native Hawaiian or Other Pacific Islander  White  American Indian/Alaska Native  Asian  
 Black/African-American  Client doesn't know

NOTE: In the Edit Member popup window, the V symbol next to field names means the field is not required to save, but it is required to pass the Verification step.

**Demographics Definitions**

- Relation
  - Describes the relationship between the household member and the head of household.
- Gender
  - Client should select a response that they identify as. Staff observations should not be used to collect information on gender
- Disabled
  - A client’s disability can be a physical, mental, chronic, or learning disorder, including HIV/AIDS.
  - Must be long continuing or of indefinite duration
  - Must substantially impede the individual’s ability to live independently
  - Could be improved by the provision of more suitable housing conditions
- Veteran
  - Determine veteran status. Additional questions are asked in program entry for veterans.
- Education
  - Highest level of education achieved by client.
- Race
  - Racial category that client identifies with. May select multiple races. Staff observation should not be used.
- Ethnicity

- Hispanic/Latino: Person of Cuban, Mexican, Puerto Rican, South or Central American or other Spanish culture of origin, regardless of race.

After clicking Save in the Edit Member popup window, the user will see another popup window to save the Data Quality Codes for Name, SSN, DOB, and Address (if applicable).

### Save information for Program 'HMIS'

The screenshot shows a form titled "Save information for Program 'HMIS'". It contains four sections, each with a data field and a corresponding quality code dropdown menu:

- Name:** John Smith  
**Name Quality Code:** Full name reported
- Address:**  
**Address Quality Code:** Client doesn't know
- SSN:** 123-55-1234  
**SSN Quality Code:** Full SSN reported
- Date of Birth:** 9/16/1960  
**Date of Birth Quality Code:** Full DOB reported

At the bottom of the form are two buttons: "Save" and "Close".

- - - Client Intake – Name
      - **Full Name Reported** - The client has provided their full First Name and Last Name.
      - **Partial code name reported** - The client has reported part of their name.
      - **Client Doesn't Know** - The client doesn't know their First or Last Name.
      - **Client Refused** - The client refused to give their First and Last Name.
      - **Data not Collected** - The intake worker did not ask the client for their First or Last Name.
  - - Client Intake – Address
      - **Full Address Reported** - The client has provided their Address.
      - **Partial, street name reported** - The client has reported part of a street.
      - **Client Doesn't Know** - The client doesn't know Address.
      - **Client Refused** - The client refused to give their Address.
      - **Data not Collected** - The intake worker did not ask the client for their Address.

- 
- Client Intake – Social Security Number
  - **Full SSN Reported** - The client has reported their full nine digit Social Security Number.
  - **Approximate or Partial SSN Reported** - The client reported only part of their nine digit Social Security Number. NOTE: If a client knows less than nine digits of their Social Security Number, do not replace the digits they do not know with 0's. For example, if a client only knows the last four digits of their SSN enter "\_\_\_\_ - \_\_-1234" in HMIS, not "000-00-1234."
  - **Client Doesn't Know** - The client does not know any part of their Social Security Number OR the client does not have a Social Security Number.
  - **Client Refused** - The client refused to give any part of their Social Security Number.
  - **Data Not Collected** - The intake worker did not ask the client for their Social Security Number.

•

- 
- Client Intake – DOB
  - **Full DOB Reported** - The client has provided their day, month, and year of birth.
  - **Approximate or Partial DOB Reported** - The client has provided their day, month, and/or year of birth, but not all three. If a client knows how old they are but not the day or month they were born on, calculate their year of birth based on their age and enter 1/1/\_\_\_\_ and fill in their year of birth.
  - **Client Doesn't Know** - The client does not know their Date of Birth or age. Fill in the Date of Birth field with 1/1/1900.
  - **Client Refused** - The client refused to give their Date or Birth or age. Fill in the Date of Birth field with 1/1/1900.
  - **Data Not Collected** - The intake worker did not ask the client for their Date of Birth or age. Fill in the Date of Birth field with 1/1/1900.

**NOTE: Client Doesn't Know, Client Refused, and Data Not Collected responses are all considered “missing” by HUD. This means that they will count as blanks on data quality reports, including the quarterly Data Quality Report Cards published by 211OC.**

The data entered will be displayed on HH Member page after saving. Each enrollment will have its own set of demographic data; that information will be copied to the next project enrollment and must be confirmed when the client is enrolled in a new project.

HOUSEHOLD MEMBERS **+** ADD SELECT ✓ EXIT

Applicant: xxerin xxtest  
TRAHMIS\_PH\_PSH [2008675] Verified: No  
Exited: No

Household Information Household Type: Households without children Household Size: 2 Member(s) Housing Status: Category 1 - Homeless

xxerin xxtest [ 2008969 ] Entry Date: 9/18/2017

MARITAL STATUS	Single	GENDER	Female	DOB (AGE)	9/8/1945 (72)	LAST 4 SSN	
RESIDENCY STATUS		MEDICAL INSURANCE	No	DISABLING CONDITION	No	VETERAN	No
EDUCATION	No Schooling Completed	1ST LANGUAGE		2ND LANGUAGE		INTERPRETER NEEDED	No
ETHNICITY	Non-Hispanic/Non-Latino	RACE	White				

xxchild xxtest [ 2008994 ] Entry Date: 9/18/2017

MARITAL STATUS		GENDER	Male	DOB (AGE)	7/12/2015 (2)	LAST 4 SSN	
RESIDENCY STATUS		MEDICAL INSURANCE	No	DISABLING CONDITION	Client doesn't know	VETERAN	No
EDUCATION		1ST LANGUAGE		2ND LANGUAGE		INTERPRETER NEEDED	No
ETHNICITY	Client doesn't know	RACE	Black/African-American				

## Additional Household Members

- To add a new household member, click on Add, and enter the client's First Name, Last Name, and DOB. If the client already exists in HMIS, a popup will appear to select the client, and their demographic information will appear. If a popup window doesn't appear, continue entering the client as a new client.
- Any clients listed on the HH Members page are enrolled in the project displayed in the upper left corner of the screen.
- If the Head of Household is enrolled in an additional projects, all household members enrolled in last project entry will be enrolled automatically.
- To remove a household member from an enrollment, click the 'X' Button to remove the member from the HH Members page for that enrollment.

## HMIS Part 2 Training - Creating Assessments

Check out [this video](#) on creating an assessment in HMIS!

Any assessments that are applicable to the project selected for the client will be available on the Assessments tab. Some assessments are required to be answered for each individual, some for households, and others you can select whether to provide answers for the individual or for the household. If multiple Assessments are available, each one will be listed along with a + button to add that assessment. All projects that target homeless clients must answer the HUD Question assessment.

### How to add an Assessment:

- Click '+' next to desired Assessment
- If applicable, in the Select Member Popup, select if the assessment is for the individual, the household, or select which members to create an Assessment for.
- To complete Assessment, click 'Edit' button to answer questions.
  - Required questions will be indicated by an asterisk and red text.
  - Some questions may allow multiple answers

4. After saving, a “Set Question Date” popup window will appear. This date should reflect the date the information was collected.

ASSESSMENT(S)

Applicant: **xxerin xxtest**    Verified: No  
 TRAHMIS\_PH\_PSH [2008675]    Exited: No

Question(s)

HUD Question [xxerin xxtest]		Score: 0.04/3    Staff: TRAederycke    Date: 09/18/2017		
Order	Question	Answer	Comment	User/Date Updated
1	Type of Residence 3.917A			
2	Length of stay in prior living situation			
3	Approximate date homelessness started			
4	(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			
5	Total number of months homeless on the street, in ES, or SH in the past three years			
6	Type of Residence 3.917B	Psychiatric hospital or other psychiatric facility		TRAederycke [09/18/2017]

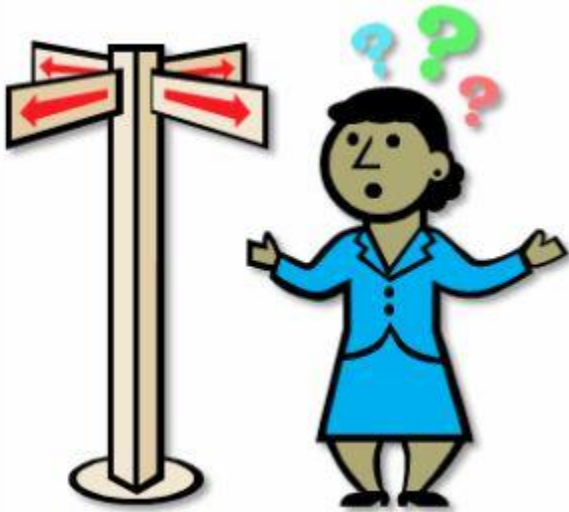
**Reminder: Chronically Homeless Definition (Effective January 15, 2016)**

- A “homeless individual with a disability,” as defined in the Act, who: lives in a place not meant for human habitation, a safe haven, or in an emergency shelter; and • has been homeless (as described above) continuously for at least 12 months or on at least 4 separate occasions in the last 3 years where the combined occasions must total at least 12 months
- An individual who has been residing in an institutional care facility for fewer than 90 days and met all of the criteria in the paragraph above before entering that facility; or
- A family with an adult head of household (or if there is no adult in the family, a minor head of household) who meets all of the criteria in paragraphs (1) or (2) of this definition, including a family whose composition has fluctuated while the head of household has been homeless.

NOTE: Occasions must be separated by a break of at least seven nights, and stays in institutions of fewer than 90 days do not constitute a break.

**Chronically Homeless Tool** 211 Orange County has created a Chronic Homelessness Tool to help users identify when a client should be considered chronically homeless. Please check out the [Chronic Homelessness Tool](#) online!

**SCENARIOS:**



**Scenario: Is this person chronically homeless?**

- An elderly man comes alone to your Transitional Housing program. The night before entering your project he was staying with his daughter and she asked him to leave due to his current and long continuing alcoholism. Is he chronically homeless?
  - No. The client was staying with his daughter before he entered a Transitional Housing program, so he is not chronically homeless.

**Scenario: Is this client chronically homeless?**

- A veteran suffering from PTSD and chronic substance abuse has been living on the street and in shelters continuously for the past six years, and has been sleeping at a local park for a year and a half before seeking shelter at your agency. Is he chronically homeless?
  - Yes. The client has a disability (PTSD), has been staying in a place not meant for human habitation (parks & doorways), and has been homeless for at least 12 months continuously.

**Scenario: Is this person chronically homeless?**

- A 17-year old who is pregnant needs shelter for the night. She is fleeing from a violent partner and spent last night in her car. She has had several episodes of homelessness over the last couple years. Is she chronically homeless?
  - No. According to HUD, pregnancy is not a disability.

## HMIS Part 2 Training - Adding Income, Non-Cash Benefits, and Health Insurance

[This video](#) provides an overview of how to use the Income tab in HMIS.

The Income tab should be used to enter Income, Non-cash Benefits and Health Insurance data for the clients in a household.

### Income

## Income

Declare no income   
 Client doesn't know   
 Client refused   
 Data not collected

INCOME SOURCE	FREQUENCY	INCOME
Earned/Employment Income	Select frequency ▼	\$0.00 ▲▼
Unemployment Insurance	Select frequency ▼	\$0.00 ▲▼
Supplemental Security Income (SSI)	Select frequency ▼	\$0.00 ▲▼
Social Security Disability Income (SSDI)	Select frequency ▼	\$0.00 ▲▼
VA Service-Connected Disability Compensation	Select frequency ▼	\$0.00 ▲▼
VA Non-Service-Connected Disability Pension	Select frequency ▼	\$0.00 ▲▼
Private disability insurance	Select frequency ▼	\$0.00 ▲▼
Worker's compensation	Select frequency ▼	\$0.00 ▲▼
Temporary Assistance for Needy Families (TANF)	Select frequency ▼	\$0.00 ▲▼
General Assistance (GA)	Select frequency ▼	\$0.00 ▲▼
Retirement Income from Social Security	Select frequency ▼	\$0.00 ▲▼
Pension or retirement income from a former job	Select frequency ▼	\$0.00 ▲▼
Child support	Select frequency ▼	\$0.00 ▲▼
Alimony and other spousal support	Select frequency ▼	\$0.00 ▲▼
Other: <input type="text"/>	Select frequency ▼	\$0.00 ▲▼

Save

Close

Income must be recorded for all Heads of Household, as well as any adults (18+) in the project. Income should only be recorded for the household member that receives it.

1. Select frequency and income amount for all income sources the client receives OR select 'Declare No Income', 'Client Doesn't Know', 'Client Refused', or 'Data Not Collected' at the top of the page.
2. Income amounts will be totaled and Monthly, Quarterly and Yearly income calculations will be displayed along with Poverty levels for the Household.
3. Income is specific to the enrollment selected, and should be verified any time a new enrollment is created.

## Non-Cash Benefits and Health Insurance

**NON-CASH BENEFITS/HEALTH INSURANCE**

**Non-Cash Benefits**

None
  Client Doesn't Know
  Client Refused
  Data Not Collected
  SNAP Amount:  ▲▼
  TANF Child Care
  Temporary Rental Assistance
  TANF Transportation
  Section 8 or Rental Assistance
  WIC
  Other TANF-Funded Services
  Other  Amount:  ▲▼

**Health Insurance**

No Health Insurance
  Client Doesn't Know
  Client Refused
  Data Not Collected
  MEDICAID 
 MEDICARE 
 VA Medical Services
  State Children's Health Insurance
  Employer Provided health Insurance
  COBRA Health Insurance
  Private Health Insurance
  State Adult Health Insurance
  Indian health services program
  Other

Non-Cash Benefits should be recorded for all Heads of Household, as well as any adults (18+). Health Insurance should be recorded for all clients.

1. Click the Edit button next to Non-Cash Benefits/Health Insurance to enter this information for a client.
2. Check all benefits received by the client.
3. Like Income, Non-Cash Benefits and Health Insurance information is specific to the enrollment selected, and should be verified any time a new enrollment is created.

## HMIS Part 2 Training - Adding Client Documents

Check out [this video](#) to learn how to upload documents into HMIS!

Some projects may require documents in order for a client to participate in the project. These documents can be added on the Documents tab, and may be added for the entire Household or for individual Household Members.






## DOCUMENTS









Applicant: **xxtest xxtester**  
CES\_CoordinatedEntry [2007726]

Verified: No  
Exited: No

Required Documents Summary	REQUIRED	PROVIDED	VERIFIED
	4	1	1

Not Provided:  Not Verified:  Verified:   

**xxtest xxtester** 

- \* Chronic Homeless Status Form (If applicable)  
- \* Declaration of Homeless Status  
- \* Disabling Condition Verification  
- \* HMIS/CE Consent Form  

No document provided

- To upload a required document, click on the Update button next to the document name, and select the method you would like to use to upload the document.
- To upload a document that is not required, click on the + button next to the client's name, then select the document type. After clicking save, the document type will be added to the client's document list, and the document can be uploaded as normal.

NOTE: Documents that have not been uploaded will be displayed in black, while documents that have been uploaded but have not been verified by a case manager will be displayed in yellow. Documents verified by a case manager will be displayed in green.

## HMIS Part 2 Training – Verification

Each enrollment must be verified and locked before services may be recorded. Once locked, the demographic, income, document and assessment data may not be changed unless the enrollment is unlocked. After editing, the application must be verified and locked again. The data may be locked and unlocked on each tab.

## Verify List

**HH Members**

- Address Quality Code Required [xxerin xctest]
- SSN Quality Code Required [xxchild xctest]

Application List  
 My Cases  
Verify List

To verify that all information has been collected:

- The Verify List tab on the right side of the screen will be yellow if information is missing.
- Click on the tab to review the missing data.
- Click on the blue icon to link to the page where the information is missing.
- Once all required data has been collected, the Verify List tab will disappear.

**HOUSEHOLD INCOME**

Applicant: xxerin xctest  
 TRAHMIS\_ServicesOnly [2008683] Verified: No  
 Exited: No

Household Income Total	MONTHLY(\$)	QUARTERLY(\$)	YEARLY(\$)	% POV.	AMI	AMI Range
	\$0.00	\$0.00	\$0.00	0.00	0	

xxerin xctest [ Female 9/8/1945 ]

INCOME

NON-CASH BENEFITS/HEALTH INSURANCE

To lock the enrollment:

- Click on the Lock button, which is available on most tabs under the Enrollment page.
- Once the enrollment is locked, revisions cannot be made to any data on the Enrollment pages.
- Services can only be provided when the enrollment is locked.

**HOUSEHOLD MEMBERS** EXIT

Applicant: xxerin xctest  
 TRAHMIS\_ServicesOnly [2008683] Verified: Yes  
 Exited: No

Household Information	Household Type Households without children	Household Size 2 Member(s)	Housing Status Category 1 - Homeless
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xxerin xctest [ 2008969 ]

Entry Date: 9/18/2017

MARITAL STATUS	Single	GENDER	Female	DOB (AGE)	9/8/1945 (72)	LAST 4 SSN	
RESIDENCY STATUS		MEDICAL INSURANCE	No	DISABLING CONDITION	No	VETERAN	No
EDUCATION	No Schooling Completed	1ST LANGUAGE		2ND LANGUAGE		INTERPRETER NEEDED	No
ETHNICITY	Non-Hispanic/Non-Latino	RACE	White				

To unlock the enrollment

- Click on the Lock button, which is available on most tabs under the Enrollment page.
- Once the enrollment is unlocked, revisions can be made to the data, but the client can no longer receive services.
- After editing any data, be sure to verify that all information has been entered, and lock the enrollment again.

## HMIS Part 2 Training - Adding Services

Use the Services page to record services delivered for your client. The client must be enrolled into a project and that enrollment must be locked and verified in order to record services. All domains associated with the active enrollment will be available on the page.

The screenshot shows the HMIS interface. On the left is a navigation menu with 'Services' highlighted in a red box. Below it are links for Case Notes, Household History, Exception, Housing (with a sub-menu), and Billing. The main content area is titled 'SERVICES' and shows an applicant: 'Johnnie Tester' with ID 'TRAHMIS\_TransitionalHousing [2008681]'. Below this, a service entry for 'HOPWA Financial Assistance' is shown with a red box around a blue '+ ADD' button. The entry details include the date '9/18/2017', the staff 'All Members [TRAmlee]', and the outcome 'Current []'.

How to create a new service:

1. Click 'Add' next to desired Domain
2. In Popup Services Window:
  1. Select Staff and Date
  2. Enter Comments if needed
  3. Select Outcome achieved if applicable
  4. Select all Members or Individual (when Individual is selected, listing of Household members will display)
  5. Select Service – change Unit Amount if needed.
3. After you save, the Service(s) will be displayed in on Services tab.

## Services

### HOPWA FINANCIAL ASSISTANCE

Staff	<input type="text" value="TRAmlee"/>	Location	<input type="text" value="Select a location"/>
Status	<input type="text" value="Select a status"/>	Contact	<input type="text" value="Location Of Contact"/>
Date	<input type="text" value="9/18/2017"/>		
Comments	<input type="text"/>		

### OUTCOME

Current []

Outcome Achieved

Term

Individual

### SERVICES PROVIDED

Rental assistance

Security deposits

Utility deposits

Utility payments



Save

Close

### Schedule Services:

- Recurring Services can be scheduled.
- Click Schedule button

- In Schedule popup window

**Schedule**

---

Start  End

---

Daily
  Weekly
  Monthly

Recur every  week(s) on:

Sunday
  Monday
  Tuesday
  Wednesday

Thursday
  Friday
  Saturday

- Select Start and End Date
- Fields will change depending on selection
- Select remaining scheduling data and then save.

All Services recorded will be displayed next to appropriate domain.

**Services**

---

**SERVICES**

**Applicant: Johnnie Tester**  
 TRAHMIS\_TransitionalHousing [2008681]

**HOPWA Financial Assistance** + ADD

**9/18/2017 Johnnie Tester [TRAmlee]** ✎ ✕

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**Comments** testing testing

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**Outcome: Current []**

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**Utility deposits** No Units

## HMIS Part 2 Training - Adding Case Notes

Case Notes can be recorded on the Case Notes page. The client must be enrolled into a project and that enrollment must be verified and locked in order to record Case Notes.

**Add New Note**

Domain \*

Staff \*

Start Date \*

Status

Note Type

Subject \*

Note \*

Group Edit

Consent

Units \*  Min.

Consent

**OUTCOME**

Current [] Outcome Achieved  Term

All Members  Individual


Steps on how to create a Case Note:

1. Open Case Notes page and click 'Add'
2. In 'Add New Note' Popup window:

1. Select Domain, Staff, Consent, Date, Time, Units, and Note Type (Group Edit field – gives other users access to edit the Note)
2. Enter Subject and Note
3. If Changing Client Outcome (Optional)
  1. Outcome change will be displayed on Case plan current situation tab
4. If recording additional services (Optional)
  1. Select All members or Individual (if Individual is selected, listing of Household members will display.)
  2. Check off Services Delivered (change Unit amount if needed.)
5. Save

Tip: After Save, a message will ask if you want to permanently lock the note; if locked the note will not be able to be edited in the future.

You can also record your voice on the Note: (Create Caste Note first, before recording your voice.)

1. Click on Microphone button 
2. In Popup Speech to the text window, click 'Start' (button will then change to 'Stop'.)
3. Record your note and then click 'Stop' when finished. (Text will be displayed in Text box and may be edited if needed.)

## HMIS Part 2 Training - Adding Annual Assessments

The Household History tab should be used to enter updates and annual assessments for your clients. Updates should be added to HMIS any time a change in income, non-cash benefits, or health insurance occurs. Annual assessments should be added to HMIS no more than thirty days before or after the anniversary of the client's Project Entry Date.

## HISTORY SUMMARY + ADD

**Applicant:** xxerin xctest  
TRAHMIS\_PH\_PSH [10000009]

**Review Date:**  
9/19/2017

9/19/2017 [Enrollment]

### Demographics

<b>Household Type</b>	Households without children	<b>Household Size</b>	1
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### Income

Monthly	Quarterly	Yearly	%POV.	AMI	AMI RANGE
\$433.33	\$1,299.99	\$5,199.96	0%	MISSING	MISSING

### Enrollment Address ✎

<b>Address</b>		<b>Unit</b>		<b>County</b>	
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9/19/2017 [Review]

### Demographics

<b>Household Type</b>	Households without children	<b>Household Size</b>	1
-----------------------	-----------------------------	-----------------------	---

### Income

Monthly	Quarterly	Yearly	%POV.	AMI	AMI RANGE
			0%	MISSING	MISSING

To add an update or annual assessment:

1. Click Add on the Summary tab, and enter the date the assessment was completed.
2. After clicking on Save, a new entry should appear on the Summary tab called Review. Select this assessment.
3. On the Detail tab, enter updates to the client's information since entry. Click on the Edit button next to Demographics, Income, and Non-Cash Benefits/Health Insurance to make changes to the client's information, or click on the Sync button to copy the information entered for the client at entry.
4. If you are completing an annual assessment, click on the + button next to Assessment to answer the annual assessment questions.
5. To review the client's historical data for the project, click on the Household History tab.



Summary **Detail** Follow up

**HISTORY DETAILS** SYNC

Applicant: **xxerin xxtest**  
TRAHMIS\_PH\_PSH [10000009]

Review Date: 9/20/2017

**Household Information**

**Household type**  
Households without children

**Household size**  
1 Member(s)

**xxerin xxtest [Male 8/17/1966]** Entry Date: 9/19/2017

**DEMOGRAPHICS** ✓

<b>MARITAL STATUS</b>	<b>EDUCATION</b>	Grades 5-6	<b>VETERAN</b>	No	<b>MEDICAL INSURANCE</b>	No
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**INCOME** ✓

<b>INCOME SOURCE</b>	Earned/Employment Income	<b>FREQUENCY</b>	Bi-weekly	<b>INCOME</b>	\$200.00
<b>TOTAL</b>					\$433.33

**NON-CASH BENEFITS/HEALTH INSURANCE** ✓

**NON-CASH BENEFITS** SNAP Amount: Section 8 or Rental Assistance

**HEALTH INSURANCE** Private Health Insurance

**ASSESSMENT** +

My Cases **Household History**

## HMIS Part 2 Training - Exiting a Client from a Project

Check out [this video](#) for more information on how to exit household members on the HH Members tab.

The HH Members tab allows exiting one or multiple members of the household when needed. Additional information may be collected, including a final assessment.

**HOUSEHOLD MEMBERS** + ADD SELECT ✓ EXIT

Applicant: **Sally Tester**  
AS1HeadStart [2008652]

Verified: No  
Exited: No

🔒


To begin the exit process:

1. Make sure all client data has been entered, and click Exit.
2. In Popup window, enter the date the exit record is being created, and click Save.
3. Click on the 'Details by Household Member tab' in the popup Exit window.
4. Review the client's Demographics, Income, Non-Cash Benefits, and Health Insurance data by clicking on the Edit button, and making revisions as needed.
5. Click '+' next to Assessment to answer the Program Exit questions and save answers.
6. After completing the Exit questions, return to the Summary tab to select the clients to be exited, and enter their Destination and Program End Dates.


**Exit Window**


**Summary** | **Detail By Household Member**

• **xxerin xxtest [Female 9/8/1945]** Entry Date: 9/18/2017

**DEMOGRAPHICS** 


MARITAL STATUS	Single	EDUCATION	No Schooling Completed	VETERAN	No	MEDICAL INSURANCE	No
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**INCOME** 

**NON-CASH BENEFITS/HEALTH INSURANCE** 

**DESTINATION**

DESTINATION		DESTINATION OTHER	
ADDRESS		COUNTY	

**ASSESSMENT** 

- It is important to exit clients in a timely manner because a delay in exiting a record from HMIS can affect the client's length of stay (LOS), as well as a project's utilization rate.
- LOS is a measurement of the number of days a client has been enrolled in your project, and is an important assessment of your projects ability to move clients out of homelessness.
- In order to collect accurate reports, exiting clients regularly and accurately is an important and necessary step.
- Should a client leave a project without notice, answers to their exit questions should be left blank.

### Rules for Exiting Clients: Shelter Programs

- Exit date is the last day of continuous residence in the project's housing before the client transfers to another residential project or otherwise stops residing in the shelter or housing project.
- Ex: If a person checked into an overnight shelter on May 30th, stayed overnight and left in the morning, the last date of service (last case note) for that shelter stay would be May 31st. If the client returned on June 21st, a new project entry date is recorded

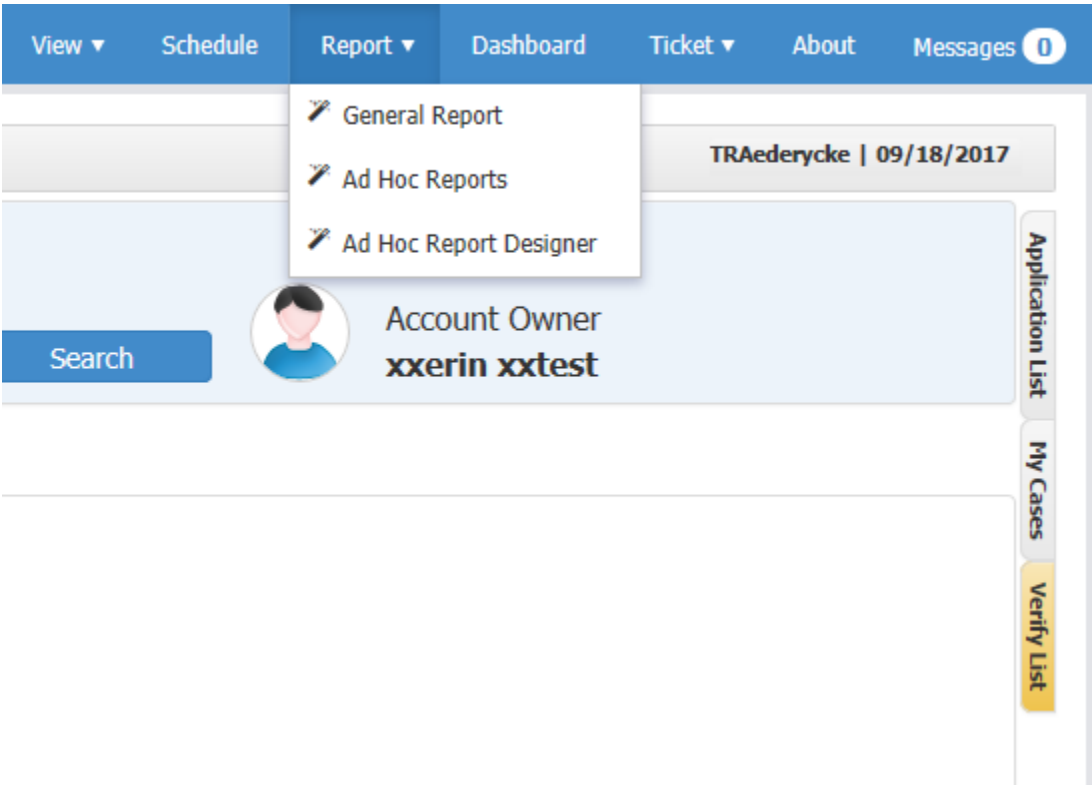
### Rules for Exiting Clients: Non-Residential Service Projects

- The exit date may represent the day a service was provided or the last date of a period of ongoing service. The exit date should coincide with the date the client is no longer considered a project participant OR when client is placed into housing, whichever comes first.
- After 30 days of non-client contact, exit the client from the project. The actual exit date should coincide with the last date of service provision.

## HMIS Part 2 Training – Reports

Reports are an essential part of ensuring data quality and completeness, as well as to measure performance for all projects in HMIS. To run reports, click on the Report drop down to see the types of reports

available. General Reports (previously management reports) are "canned reports" that have been created by our vendor, and are available for users to run. Ad hoc reports are reports created by 211OC staff or users at your agency, and are usually client level data exports.



To run a General report or Ad Hoc report:

- 1. To see a list of all of the reports that are available for the selected report type, change the Category to "All", and click on Search.
- 2. Click on the name of the report and then click 'Show' to enter the parameters for that report.
- 3. Enter the parameters of the report, and click on View Report.
- 4. Once the report runs, General reports can be exported to PDF or Excel, and Ad Hoc reports should be exported to Excel.

### General Report List

ALL

	Report Name	Category Name	Description	Date Published	Report Path
<input type="button" value="Show"/>	☆ HMIS Data Quality Report	HMIS		09/06/2017 09:50:05 PM	/AES046/General/HMIS... HMIS Data Quality Report_v6
<input type="button" value="Show"/>	☆ Training by User	Statistics		09/06/2017 09:33:39 PM	/AES046/General/2050... Training by User

General Report List