



Homeless Management Information System (HMIS)

Manual

Community Action Partnership of San Bernardino County
Homeless Management Information System (HMIS)
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HMIS
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HMIS Manual

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Disclaimer: The Clients used in all screen shots of this manual are fictitious and no valid client information from the live production database is used.

I. Logging In to HMIS

Step 1: From your Desktop, double-click the [Enginuity](#) icon:



This brings up the log in window:

A screenshot of a login window titled 'CAPSBC V4.3.3'. The window has a blue background and contains the following fields: 'User ID:' with the text 'tra_jfeir', 'Password:' with 'xxxxxxxx', 'Site:' with a dropdown menu showing 'Production Site', and 'Group:' with an empty text box. On the right side, there is the 'Adsystem' logo and the text 'Adsystem Inc.'. At the bottom right, there are two radio buttons labeled 'Start' and 'Close'.

NOTE: The above fields are tabbing friendly if you choose to tab instead of clicking with your mouse.*

1. **User ID:** 3-digit org code, underscore, first initial, last name.
Example: tra_jfeir
2. **Password:** 8 digits or more, including at least one number.
3. **SITE:** Production Site.
4. Click on your "**Group**"
5. Click on **Start**.

Please Note: If you try to log in more than three times with the wrong user ID or password, you will be locked out. Call a Systems Administrator to reset your password.

* Compliant with the American Disabilities Act of 1990.

Note: If you haven't used HMIS for a while and are unable to log in, you might not have the latest version. Contact a Systems Administrator at **Community Action Partnership of San Bernardino County (909-723-1522 or 723-1523)** to help you download the latest version. Or you may also email our HMIS helpdesk at jfeir@capsbc.sbcounty.gov.

- If you try to log in more than three times with the wrong user ID or password, you will be locked out. Call a Systems Administrator to reset your password.

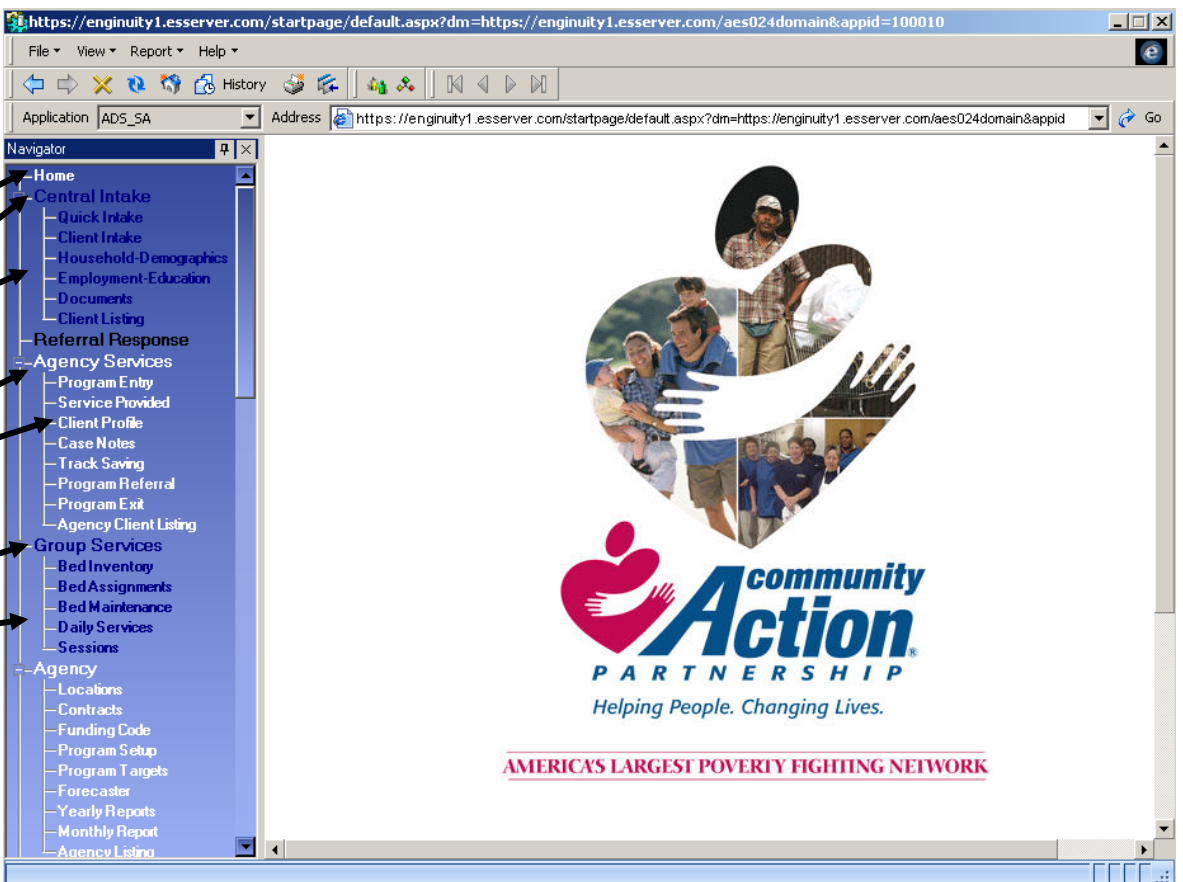
II. HMIS Software Terminology

Select a Row: Always click in the gray box at the left end of a row. This will highlight the entire row in blue. (Same as highlighting a row in an MS Excel spreadsheet.)

Grid: Grids show multiple records at one time, to view a bigger picture. More than one record saved on a screen, or more than one record that matches a search criteria, will appear in a grid (like an MS Excel spreadsheet).

Libraries: The system is divided into **Libraries (Central Intake, Agency Services, and Group Services)** which appear in the blue **Navigator Pane** on the left hand side of the HMIS screen. The data entry screens are listed below each library heading. **NOTE:** The "Central Intake" library is not directly connected to the "Agency Services" library

Screens: A screen (or **Page**) is a group of information gathered together for a certain function that you will see on your screen when the screen by that title is highlighted. Screens are listed below each library. The screen you are currently viewing will be highlighted in Orange. Click on any Screen to open it. For example, the Central Intake Library contains the following screens; Quick Intake, Client Intake, Household-Demographics, Employment-Education, Documents, Eligibility, Referral and Client Listing.



The screenshot shows a web browser window with the URL <https://engineuity1.esserver.com/startpage/default.aspx?dm=https://engineuity1.esserver.com/aes024domain&appid=100010>. The browser's address bar shows the application as ADS_SA. The main content area displays the Community Action Partnership logo and the text "AMERICA'S LARGEST POVERTY FIGHTING NETWORK".

The Navigator Panel on the left lists the following libraries and screens:

- Home
- Central Intake
 - Quick Intake
 - Client Intake
 - Household-Demographics
 - Employment-Education
 - Documents
 - Client Listing
- Referral Response
- Agency Services
 - Program Entry
 - Service Provided
 - Client Profile
 - Case Notes
 - Track Saving
 - Program Referral
 - Program Exit
 - Agency Client Listing
- Group Services
 - Bed Inventory
 - Bed Assignments
 - Bed Maintenance
 - Daily Services
 - Sessions
- Agency
 - Locations
 - Contracts
 - Funding Code
 - Program Setup
 - Program Targets
 - Forecaster
 - Yearly Reports
 - Monthly Report
 - Agency Listing

Arrows from the following labels point to the corresponding items in the Navigator Panel:

- Navigator Panel points to the "Home" item.
- Library Name points to "Central Intake".
- Screens points to "Quick Intake".
- Library Name points to "Agency Services".
- Screens points to "Program Entry".
- Library Name points to "Group Services".
- Screens points to "Bed Inventory".

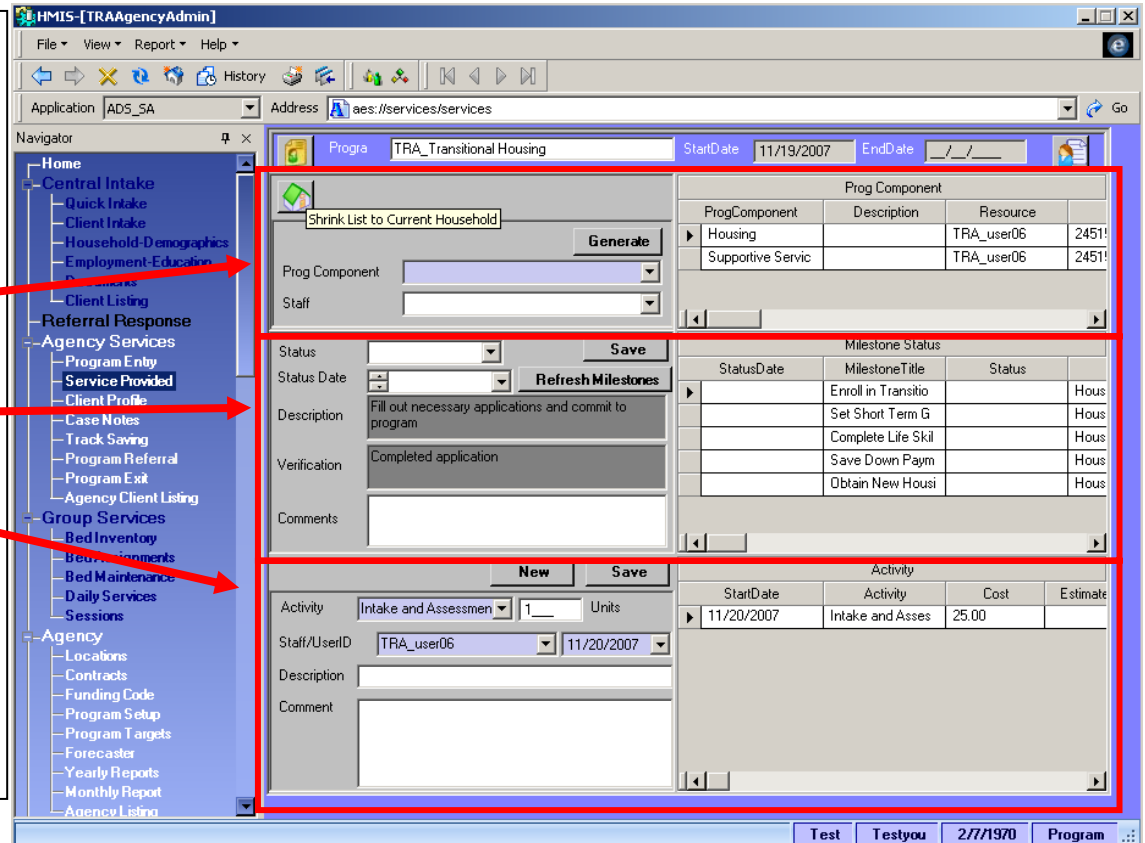
II. HMIS Software Terminology (continued)

Containers: Containers group together and keep separate certain information within a screen. Containers work to save information separately within the same client record. (*Hint: You must click on **Save** within the container to save information entered in **that** container. Clicking on **Save** in another container on the page will not save information in all the containers on that screen.)

Container Examples

In the Service Provided screen there are three "containers":

- 1) Program Component container
- 2) Milestone Status container
- 3) Activity container

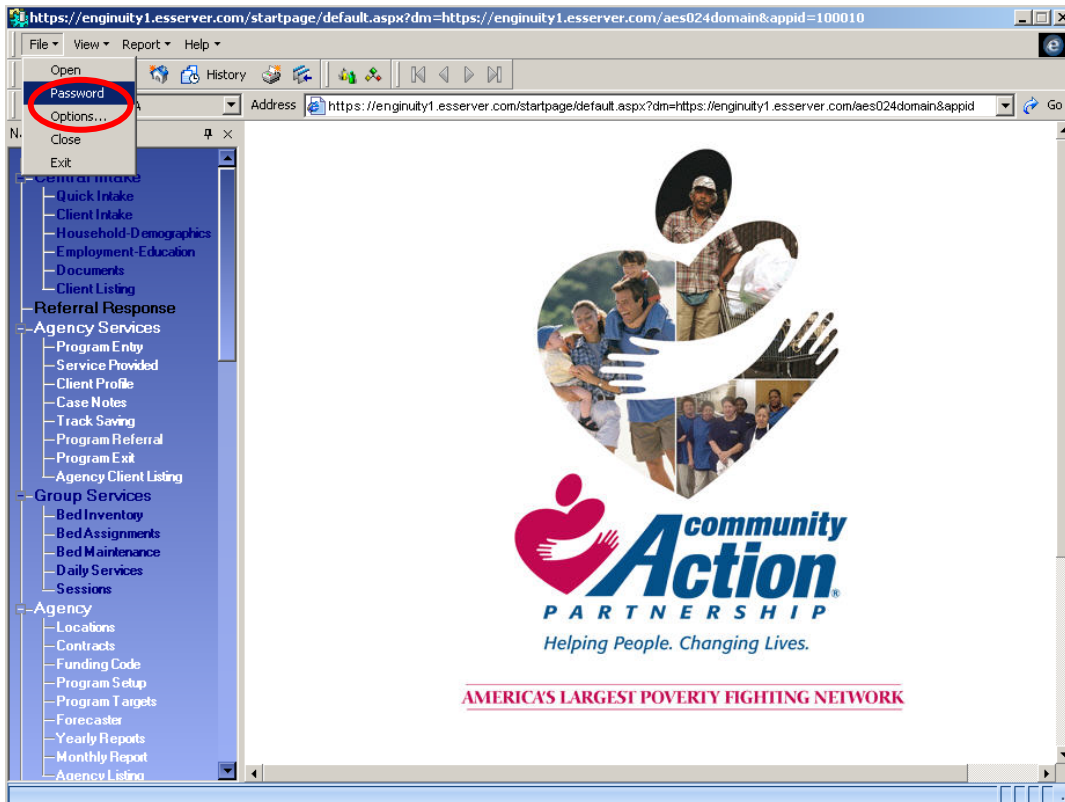


The screenshot shows the HMIS software interface for a client record. The main window displays the 'Service Provided' screen for a program named 'TRA_Transitional Housing'. The interface is divided into three distinct containers highlighted with red boxes:

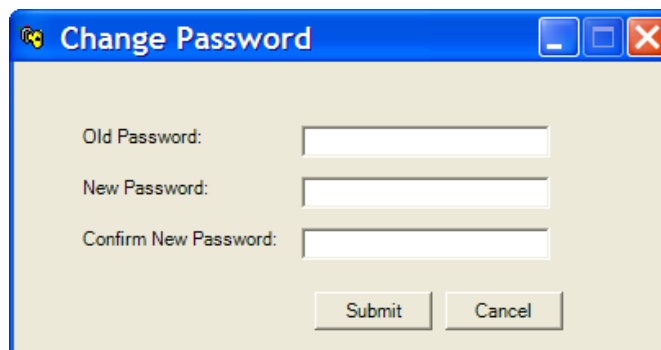
- Program Component Container (Top):** Contains a 'Shrink List to Current Household' button, a 'Generate' button, and a table with columns: ProgComponent, Description, Resource, and a value. The table lists 'Housing' and 'Supportive Serv' with resource 'TRA_user06' and value '2451!'.
- Milestone Status Container (Middle):** Contains a 'Status' dropdown, 'Status Date' dropdown, 'Refresh Milestones' button, 'Description' text area (containing 'Fill out necessary applications and commit to program'), 'Verification' text area (containing 'Completed application'), and 'Comments' text area. To the right is a table with columns: StatusDate, MilestoneTitle, Status, and Hous. The table lists milestones like 'Enroll in Transiti', 'Set Short Term G', 'Complete Life Skil', 'Save Down Paym', and 'Obtain New Housi'.
- Activity Container (Bottom):** Contains a 'New' button, 'Save' button, 'Activity' dropdown (set to 'Intake and Assesmen'), 'Units' input (set to '1'), 'Staff/UserID' dropdown (set to 'TRA_user06'), 'Start Date' dropdown (set to '11/20/2007'), 'Description' text area, and 'Comment' text area. To the right is a table with columns: StartDate, Activity, Cost, and Estimate. The table lists an activity on '11/20/2007' with cost '25.00'.

III. How to Change Your HMIS Password

1. Log in to HMIS with your current password.
2. Click on **File** (top left corner of window) and select **Password** from the dropdown menu.



3. This brings up the **Change Password** pop-up window.



4. Type in old and new passwords and click on **Submit**. A message will pop up that your new password has been accepted.

IV. Setting Consent Level on HMIS

Consent level is an additional security feature to HMIS that determines the HMIS user(s) that will be able to view the information on that screen.

- **System** - HMIS users **system wide** will be able to view this standard information
- **Region** – Only HMIS users in **San Bernardino County** will be able to view this information
- **Organization** - Only HMIS users in **your agency** will be able to view this information
- **Group** - A **group within your agency** set up by HMIS system admin will be able to view this information
- **Private**- Only the HMIS user who entered the information will be able to view or access this information

Central Intake Library Screens – Consent level would be set at **System**

Agency Services Library Screens – Consent level generally would be set at **Organization**

Group Services Library Screens – Consent level generally would be set at **Organization**

The screenshot shows a web browser window with the URL <https://engineuity1.esserver.com/startpage/default.aspx?dm=https://engineuity1.esserver.com/aes024domain&appid=100010>. The application is titled 'ADS_SA'. The navigation menu on the left is organized as follows:

- System
 - Home
 - Central Intake
 - Quick Intake
 - Client Intake
 - Household-Demographics
 - Employment-Education
 - Documents
 - Client Listing
 - Referral Response
- Organization
 - Agency Services
 - Program Entry
 - Service Provided
 - Client Profile
 - Case Notes
 - Track Saving
 - Program Referral
 - Program Exit
 - Agency Client Listing
 - Group Services
 - Bed Inventory
 - Bed Assignments
 - Bed Maintenance
 - Daily Services
 - Sessions
 - Agency
 - Locations
 - Contracts
 - Funding Code
 - Program Setup
 - Program Targets
 - Forecaster
 - Yearly Reports
 - Monthly Report
 - Agency Listing

The main content area features a large graphic of a hand holding a heart, with the Community Action Partnership logo and the text 'AMERICA'S LARGEST POVERTY FIGHTING NETWORK' below it.

***Note: Be sure to check consent level before saving information.** Consent level can be raised (i.e., **Private** can be raised to **Organization**), but consent level cannot be reduced (i.e., **System** consent cannot be reduced to **Organization**). If you accidentally set the consent level incorrectly and need to reduce it, contact Community Action Partnership of San Bernardino County.

V. How to Enter a Client in HMIS

The first thing you want to do before entering a client is search the database to make sure that your client has not already been entered in HMIS before by your agency or perhaps by another agency. There are two areas to search: **Client Listing** and **Agency Client Listing**.

Client Listing houses all clients entered by every agency using the system. Search here first to make sure that your client has not been entered in the system before.

Agency Client Listing houses all records that have been entered by your agency only. So, you would not use this as your initial search when entering a new client.

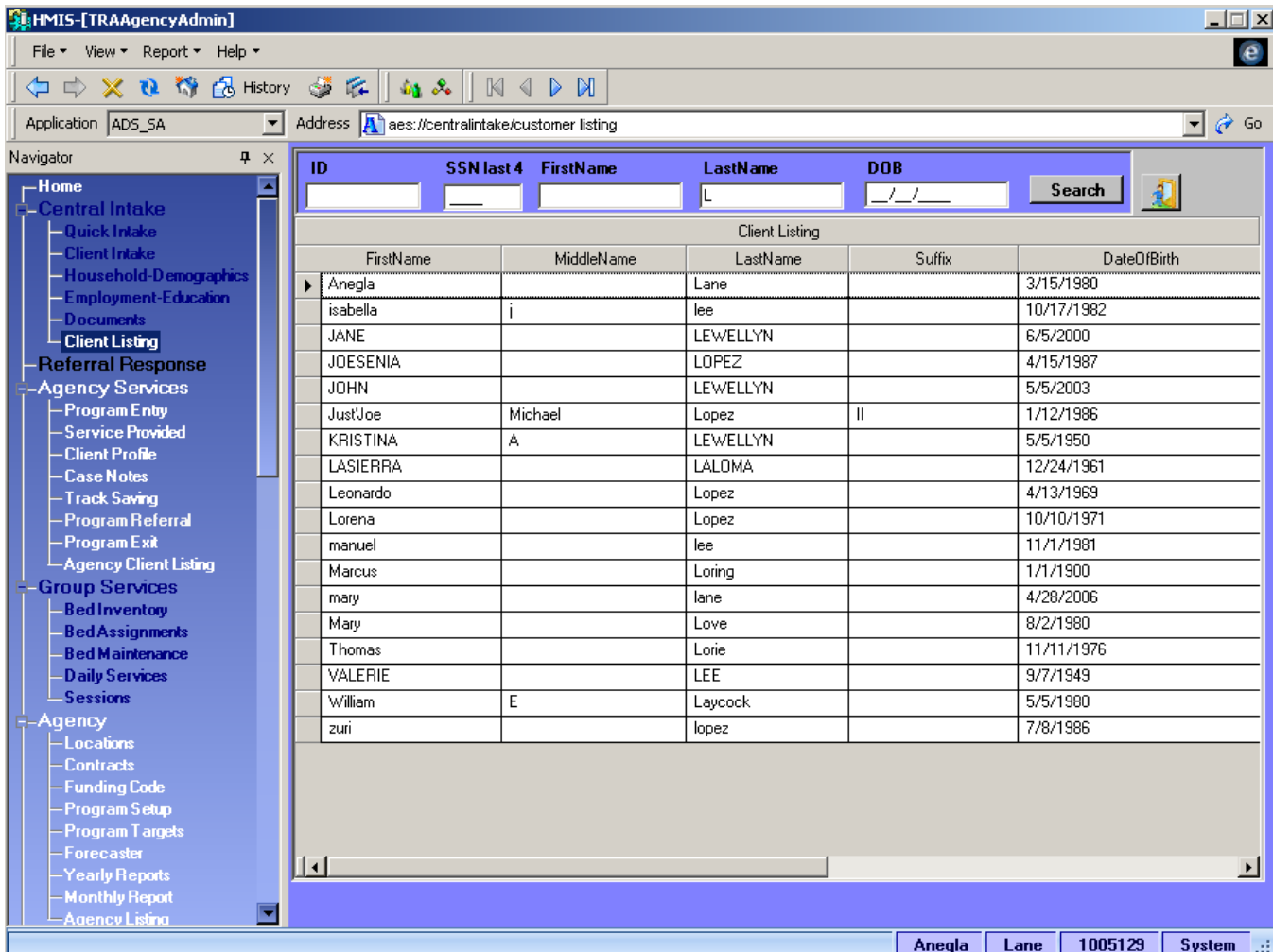
How to Search in Client Listing

1. Log in to HMIS. This brings up the Home page.
2. In the Navigator pane on the left, click on **Client Listing**. This brings up a page where you can search for all clients who have been entered in HMIS.

Search in **Client Listing** first to make sure that your client has not been entered by another agency.

V. How to Enter a Client in HMIS (continued)

- Enter the first couple of letters or just the first letter of the client's last name in the **LastName** field and click on **Search**. (We don't recommend entering the full name because if someone already entered that client with a slightly different spelling, it won't show up.)



Application: ADS_SA Address: aes://centralintake/customer listing

Search: Search

Client Listing				
FirstName	MiddleName	LastName	Suffix	DateOfBirth
▶ Anegla		Lane		3/15/1980
isabella	i	lee		10/17/1982
JANE		LEWELLYN		6/5/2000
JOESENIA		LOPEZ		4/15/1987
JOHN		LEWELLYN		5/5/2003
JustJoe	Michael	Lopez	II	1/12/1986
KRISTINA	A	LEWELLYN		5/5/1950
LASIERRA		LALOMA		12/24/1961
Leonardo		Lopez		4/13/1969
Lorena		Lopez		10/10/1971
manuel		lee		11/1/1981
Marcus		Loring		1/1/1900
mary		lane		4/28/2006
Mary		Love		8/2/1980
Thomas		Lorie		11/11/1976
VALERIE		LEE		9/7/1949
William	E	Laycock		5/5/1980
zuri		lopez		7/8/1986

Anegla Lane 1005129 System

- If the list of matching clients is too long, enter two or three letters of the first name in the search field and click on **Search** again.
- To sort the names in alphabetical order, click on the heading you want to sort by (e.g., **Last Name**).
 - If a client does not show up in **Client Listing** after the hourglass disappears, he/she is not in HMIS or you do not have permission to view the record. Click on **Client Intake** or **Quick Intake** in the Navigator Pane on the left to start entering your client.
 - If a client IS listed in **Client Listing**:
 - Click on the small gray box to the left of the client's name to select the entire row.
 - Click on the **Quick Intake** screen on the left and verify the client information.

How to Search in Agency Client Listing

The screen below is used to search for clients who have already been enrolled in your program. Use the fields at the top of the screen to search for a specific client.

- To find a client who is currently enrolled your program, select **Yes** in the **Active** field.
- To find a client who has been exited from your program, select **No** in the **Active** field.

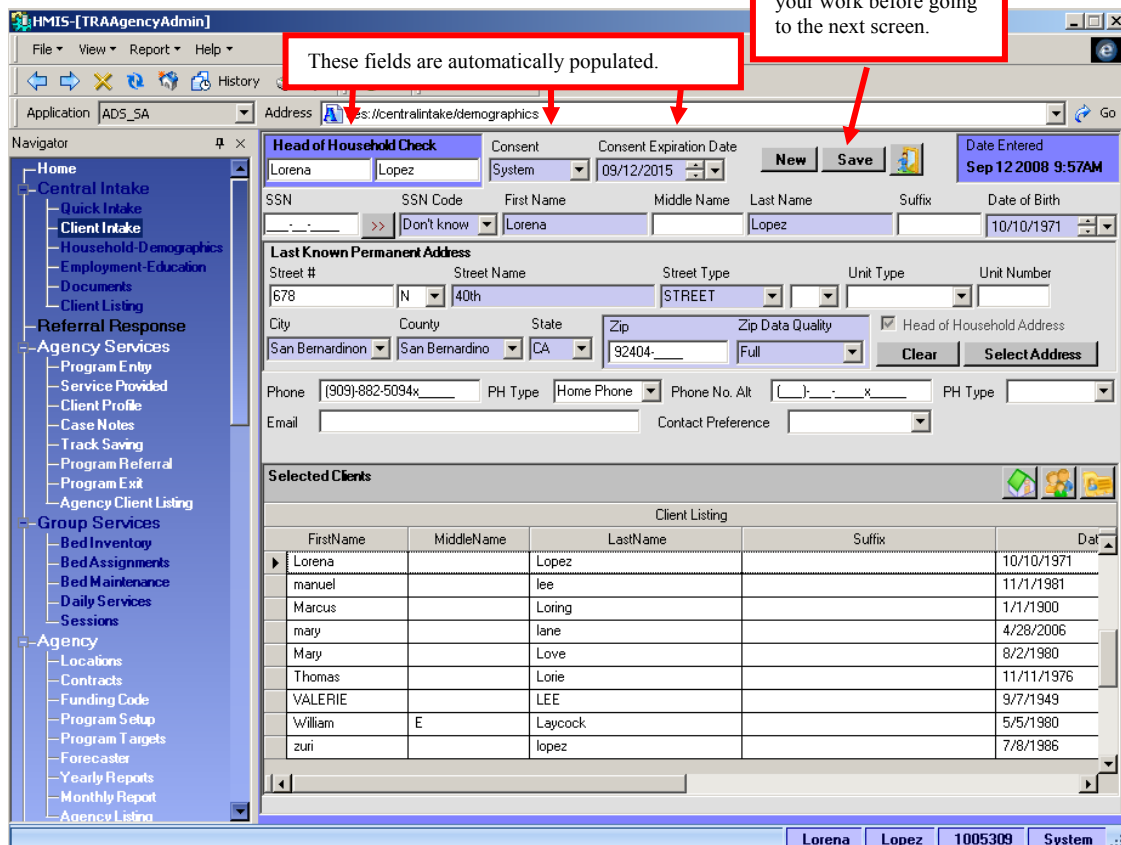
The screenshot shows the HMIS- [TRAAgencyAdmin] application window. The navigation pane on the left has "Agency Client Listing" circled. The search form at the top includes fields for "Active", "Program", "FirstName", "LastName", "DOB", and "Staff", along with a "Search" button and a "Set Operation Year" dropdown set to "2008". Below the search form is a table titled "Customer Listing" with columns for "ActiveProgram", "Program", "FirstName", "LastName", and "Date".

ActiveProgram	Program	FirstName	LastName	Date
Yes	TRA_Transitional	ddd	ddd	7/7/2008
Yes	TRA_Transitional	daffy	duck	5/7/1984
No		ddd	ddd	7/7/2008
No		daffy	duck	5/7/1984
No		Daisy	Duck	7/16/1950
No		donald	duck	8/17/1968

1. Click on **Search**.
2. Highlight the entire row by clicking on the black arrow.
3. With the row highlighted, you are now ready to take your client to another screen. Since you are already in the Agency Services Library, in order to go to another Library, you will need to go to Program Entry first and use the Jump to Demographics button to go to the Central Intake Library.

Enrolling a Client in a Program using Client Intake

1. The **Head of Household Check** field, **Consent** (who can see the record), and **Consent Expiration Date** (when the record purges from HMIS): These fields are automatically populated. Please do not change them.
2. **SSN Code:** If you enter the full social security number, select **"Full."** You can also select **"Don't Know," "Partial"** (last 4 digits only), or **"Refused."** **DO NOT enter a false social security number or zeros in place of unknown digits.**
3. Enter first and last name. Do not enter "Unknown" in either of these fields.
4. Enter Date of Birth.
5. Enter last known permanent address. **Do not enter the address of a transitional or temporary program**, such as a recovery program or transitional shelter. If you do, the system will "force" that client into the same household with any other clients on the system with the same address.
6. **Zip Code and Zip Data Quality:** A **Zip Code is not required** for Last Known Permanent Address, however, **Zip Data Quality is required.** You must choose a selection from the dropdown for Zip Data Quality.
7. Enter any phone numbers, e-mail or contact information if you have them.
8. Click on **Save** at the top of the screen and click on **Household-Demographics** in the Navigator Pane on the left (see arrow below).



These fields are automatically populated.

Don't forget to Save your work before going to the next screen.

HMIS- [TRA AgencyAdmin]

File View Report Help

Application ADS_SA Address es://centralintake/demographics

Navigator

- Home
- Central Intake
 - Quick Intake
 - Client Intake
 - Household-Demographics
 - Employment-Education
 - Documents
 - Client Listing
- Referral Response
- Agency Services
 - Program Entry
 - Service Provided
 - Client Profile
 - Case Notes
 - Track Saving
 - Program Referral
 - Program Exit
 - Agency Client Listing
- Group Services
 - Bed Inventory
 - Bed Assignments
 - Bed Maintenance
 - Daily Services
 - Sessions
- Agency
 - Locations
 - Contracts
 - Funding Code
 - Program Setup
 - Program Targets
 - Forecaster
 - Yearly Reports
 - Monthly Report
 - Agency Listing

Head of Household Check Consent Consent Expiration Date

Lorena Lopez System 09/12/2015

New Save Date Entered Sep 12 2008 9:57AM

SSN SSN Code First Name Middle Name Last Name Suffix Date of Birth

. Don't know Lorena Lopez 10/10/1971

Last Known Permanent Address

Street # Street Name Street Type Unit Type Unit Number

678 N 40th STREET

City County State Zip Zip Data Quality Head of Household Address

San Bernardino San Bernardino CA 92404 Full

Clear Select Address

Phone (909) 882-5094x PH Type Home Phone Phone No. Alt PH Type

Email Contact Preference

Selected Clients

Client Listing

FirstName	MiddleName	LastName	Suffix	Date
Lorena		Lopez		10/10/1971
manuel		lee		11/1/1981
Marcus		Loring		1/1/1900
mary		lane		4/28/2006
Mary		Love		8/2/1980
Thomas		Lorie		11/11/1976
VALERIE		LEE		9/7/1949
William	E	Laycock		5/5/1980
zuri		lopez		7/8/1986

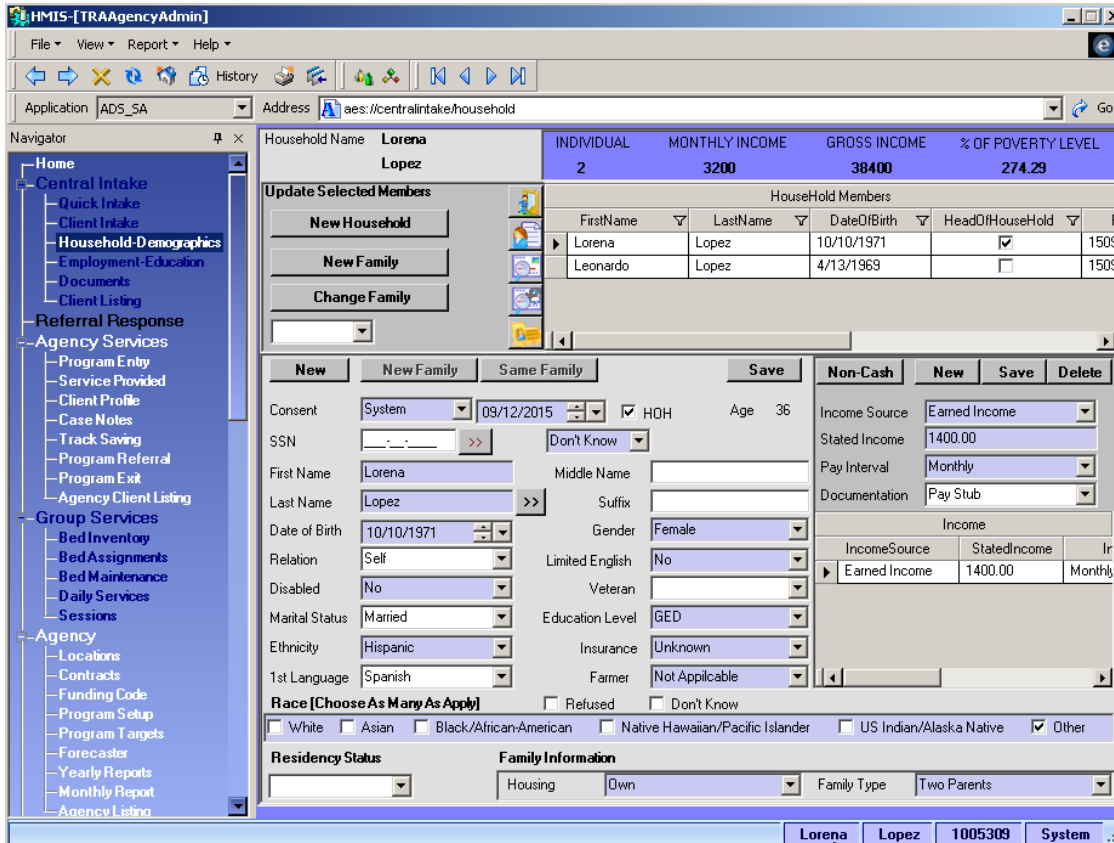
Lorena Lopez 1005309 System

Important Notes About Central Intake

- Only the “**Head of Household**” is entered on the **Client Intake** screen. All other family members are entered on the **Household Demographics** screen for the Head of Household.
- If you are using **Quick Intake** instead of **Client Intake**, **Head of Household** and all family members can be added on this screen. The **blue fields are REQUIRED fields**. This means you are required to **ask** those questions. The client is not required to give their SSN or the Zip for “Last Know Permanent Address.” **NOTE: Do not enter the address of a transitional or temporary program**, such as a recovery program or transitional shelter. If you do, the system will “force” that client into the same household with any other clients on the system with the same address.
- Enter the client’s full legal name, not a nickname (e.g., enter “William” even if the client goes by “Bill”). To enter an alias, see instructions for **Household Demographics**.
- You must complete all required fields in **Client Intake** and **Household Demographics** or the **Quick Intake** screens. **Employment-Education** and **Documents** screens are optional.
- When you change screens, always check the name at the bottom of the screen to be sure you are working on the correct client.

Household Demographics

You will notice that several fields are already filled in from the information you entered in **Client Intake**. The remaining **blue fields** must be completed. **Note:** The system tabs left to right. If you want to tab between fields, start with the **Gender** field



HMIS [TRAAgencyAdmin]
 Application: ADS_SA Address: aes://centralintake/household

Navigator: Home, Central Intake, Quick Intake, Client Intake, **Household-Demographics**, Employment-Education, Documents, Client Listing, Referral Response, Agency Services, Group Services, Agency

Household Name: Lorena Lopez
 INDIVIDUAL: 2 MONTHLY INCOME: 3200 GROSS INCOME: 38400 % OF POVERTY LEVEL: 274.29

Update Selected Members				
Household Members				
FirstName	LastName	DateOfBirth	HeadOfHouseHold	F
Lorena	Lopez	10/10/1971	<input checked="" type="checkbox"/>	1500
Leonardo	Lopez	4/13/1969	<input type="checkbox"/>	1500

Consent: System 09/12/2015 HOH Age: 36
 SSN: [] Don't Know
 First Name: Lorena Middle Name: []
 Last Name: Lopez Suffix: []
 Date of Birth: 10/10/1971 Gender: Female
 Relation: Self Limited English: No
 Disabled: No Veteran: []
 Marital Status: Married Education Level: GED
 Ethnicity: Hispanic Insurance: Unknown
 1st Language: Spanish Farmer: Not Applicable
 Race [Choose As Many As Apply]: White Asian Black/African-American Native Hawaiian/Pacific Islander US Indian/Alaska Native Other
 Residency Status: [] Family Information: Housing: Down Family Type: Two Parents

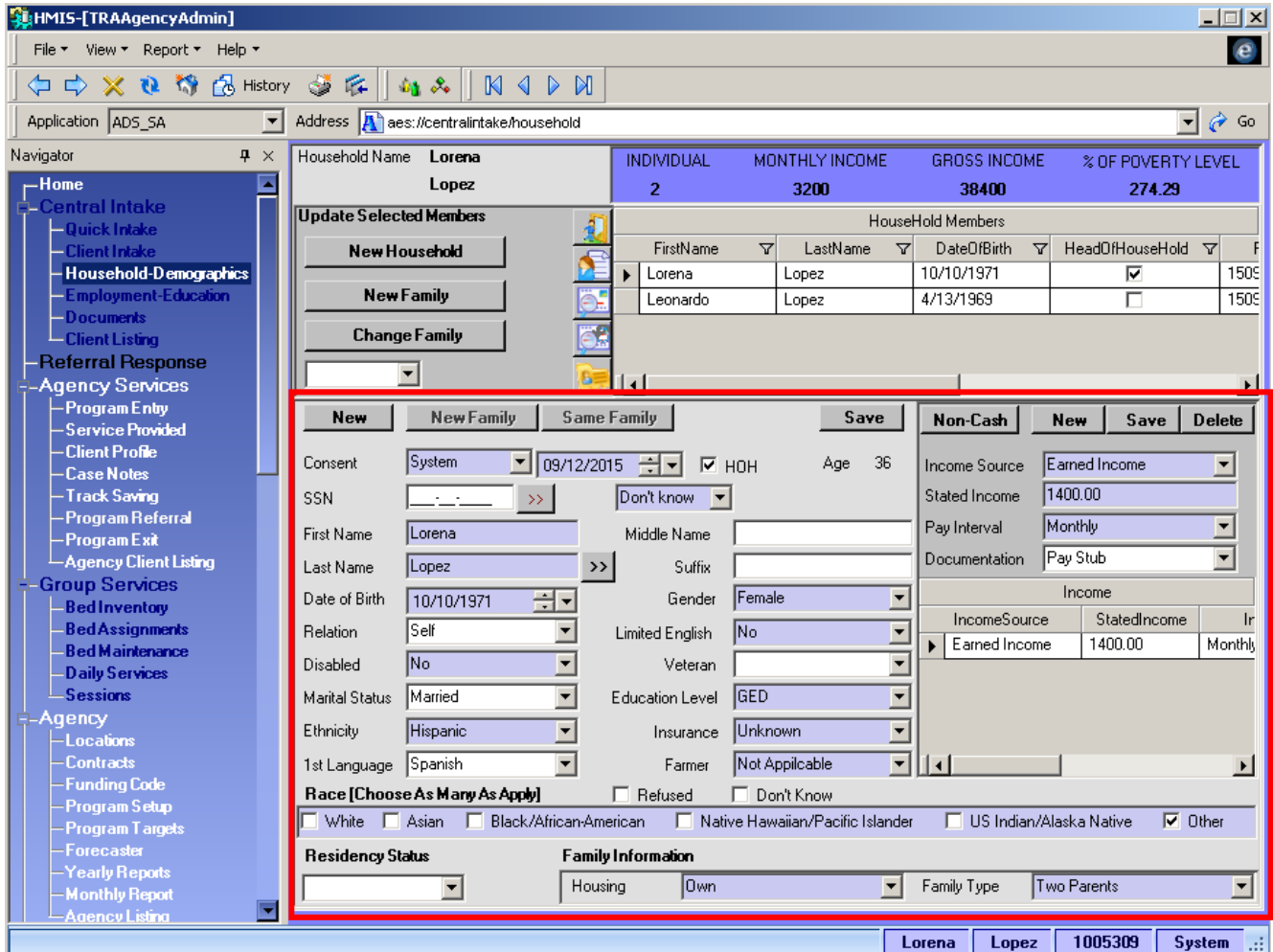
Income Source: Earned Income Stated Income: 1400.00 Pay Interval: Monthly Documentation: Pay Stub

Lorena Lopez 1005309 System

1. Check here to be sure the correct client is listed.
2. To enter an alias (nickname or other name the client uses), click on the double arrow button **>>** to the right of the Last Name field.
3. Relation (to Head of Household): Select "Self" if this is the Head of Household. We'll go over adding other family members later.
4. Ethnicity: You must select Hispanic or Non-Hispanic.
5. Race (White, Asian Black/African-American, etc): Select at least one box. You may select as many boxes as apply. Check the HUD Data Standards for clarification on Ethnicity and Race designations.
6. Housing: Refers to the client's living situation immediately before entering the program.
7. Family Type: Select the category that describes the client and any family members entering your program. If the client is entering your program alone (no spouse, children, or other family members), select "unaccompanied," even if he/she is married or a parent.
8. Click on Save (right above client's age).

Adding Household Members to Client Intake

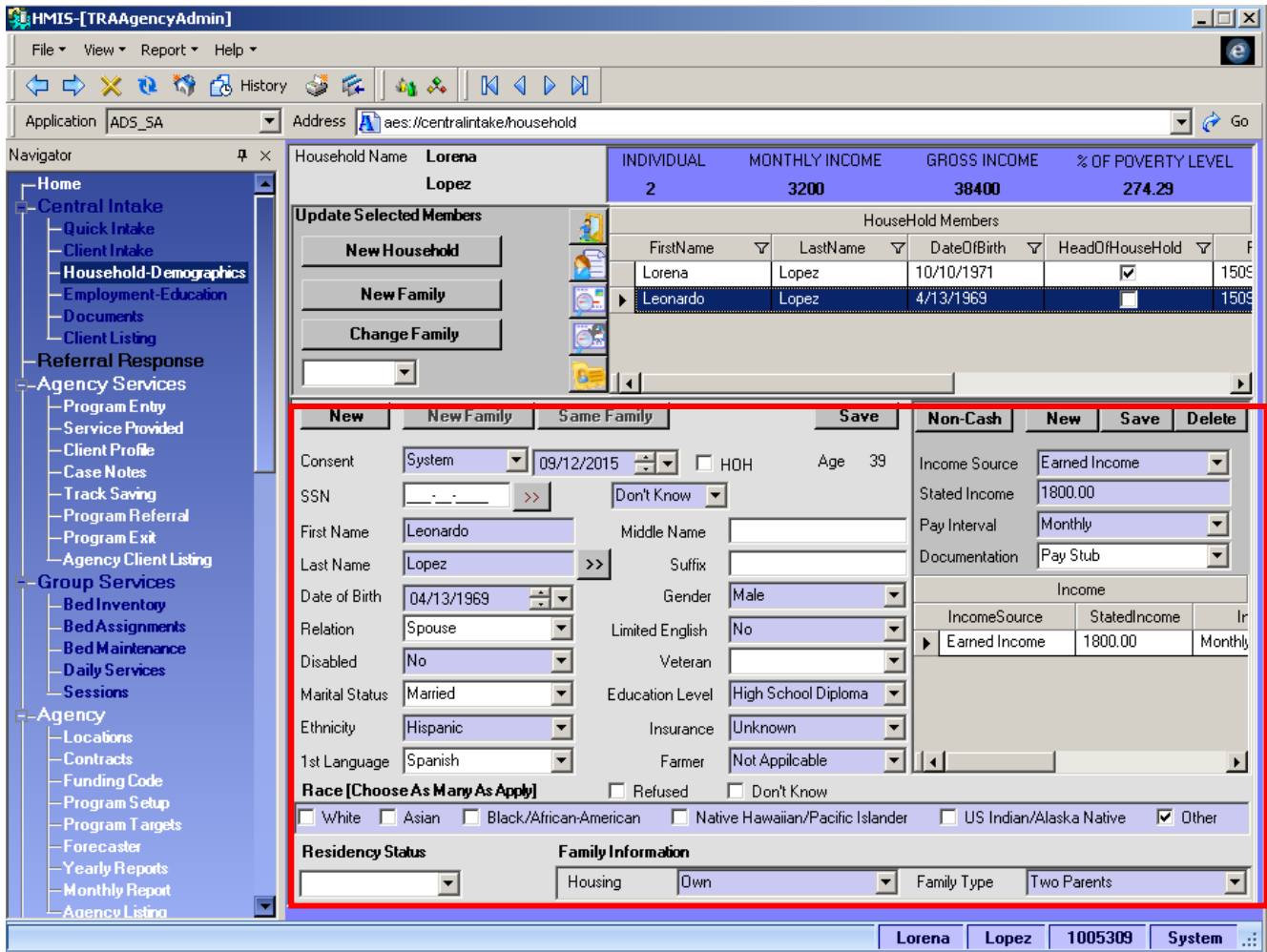
Household members can be added to the same family or a new family on the **Household Demographics** screen.



1. Click on **New**.
2. Starting with the **SSN** field, enter the household member's information. Reminder: All blue fields must be completed. **Family Information (Housing and Family Type)** are "grayed out" because they default in from the Head of Household.

Adding Household Members to Client Intake

3. When all fields are complete, click on **Same Family or New Family** if the person that you are entering will start a new family within the household.
4. Click Save when finished.



The screenshot shows the HMIS-TRAAgencyAdmin interface. The main window displays the 'Household-Demographics' form for a household named 'Lorena Lopez'. The form includes the following fields and options:

- Consent:** System, 09/12/2015, HOH, Age 39
- SSN:** [Redacted], Don't Know
- First Name:** Leonardo, Middle Name: [Empty]
- Last Name:** Lopez, Suffix: [Empty]
- Date of Birth:** 04/13/1969, Gender: Male
- Relation:** Spouse, Limited English: No
- Disabled:** No, Veteran: [Empty]
- Marital Status:** Married, Education Level: High School Diploma
- Ethnicity:** Hispanic, Insurance: Unknown
- 1st Language:** Spanish, Farmer: Not Applicable
- Race [Choose As Many As Apply]:**
 - White
 - Asian
 - Black/African-American
 - Native Hawaiian/Pacific Islander
 - US Indian/Alaska Native
 - Other
- Residency Status:** [Empty]
- Family Information:** Housing: Own, Family Type: Two Parents

The 'Income' section is also visible, showing:

IncomeSource	StatedIncome	Ir
Earned Income	1800.00	Monthly

A red box highlights the 'New Family' and 'Same Family' buttons, along with the 'Save' button and the 'Income' section.

Entering Income and Non-Cash Benefits

- Step 1 and 2:** At the time of initial program entry, go to the **Household Demographics** screen (arrow 1) and highlight your client in the grid of Household members.

The screenshot shows the HMIS interface for household demographics. The left sidebar has a navigation tree where 'Household-Demographics' is selected. The main window displays a table of household members. The first member, Lorena Lopez, is highlighted. Below the table, there are buttons for 'New Household', 'New Family', and 'Change Family'. The bottom section contains various data entry fields for the selected member, including 'Income Sources' and 'Non-Cash' buttons.

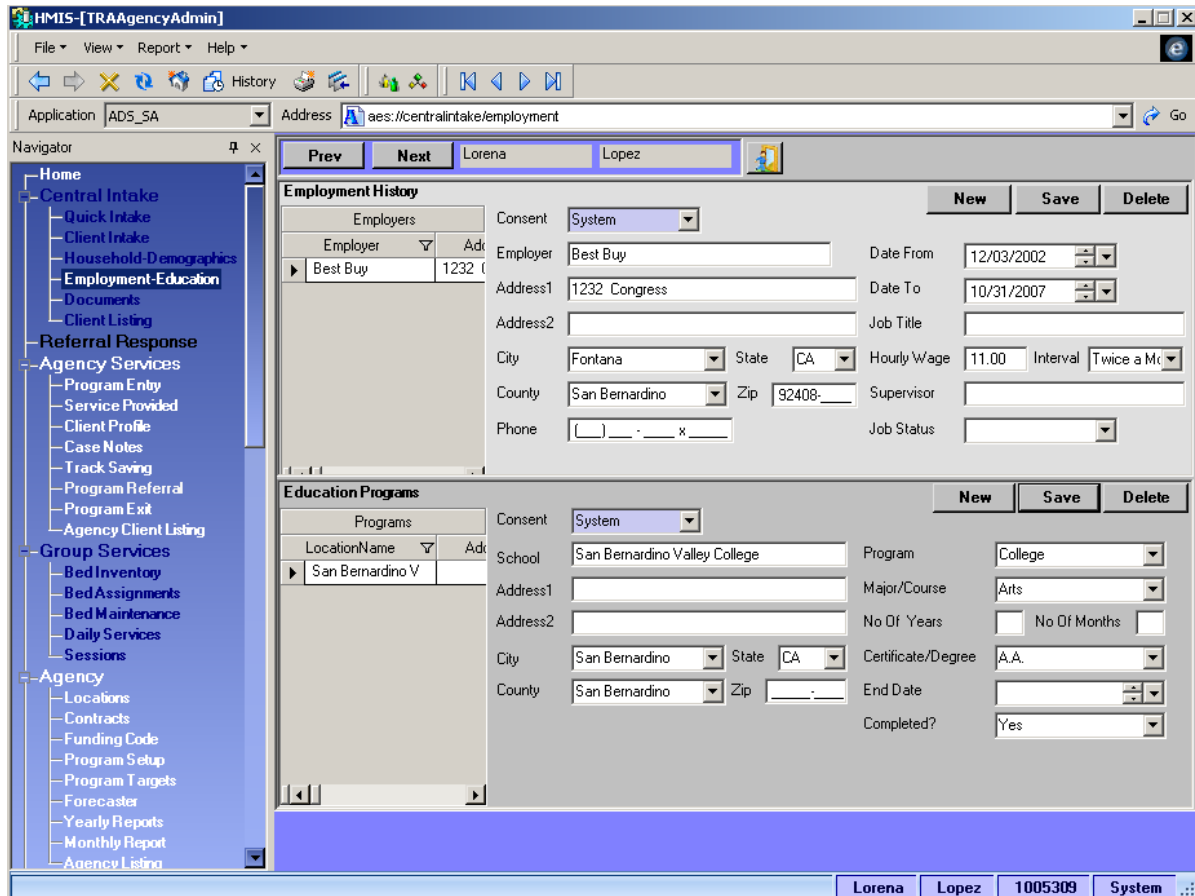
- Step 3:** Click on **New** and enter the income sources and amounts at time of entry to the program, then click **Save**. (see arrow 3 above pointing out the container where income is entered)
- Step 4:** If the client receives a non-cash benefit, such as food stamps, click on the **Non-Cash Benefit** button to bring up the pop-up screen and check off any non-cash benefits.

The screenshot shows the 'Non-Cash Benefit' pop-up window. It contains several checkboxes for benefits: Food Stamps or Benefits Card (checked), MEDICAID, MEDICARE, State Children's Health Insurance, VA Medical Services, TANF Child Care, TANF Transportation, WIC, Other TANF-Funded Services, and Section 8 or Rental Assistance (checked). There is an 'Other' text field and 'Save' and 'Close' buttons.

- Step 5:** Click **Save** before closing the screen.
- The income you have entered will be reflected in the **Program Entry** screen as the client's Income at Entry, as this data will be pulled from the Household Demographics screen.
- IMPORTANT:** If you need to make changes to income **AFTER** program entry, please see **How to Make Changes to Income**.

Employment-Education

This is an optional screen which can be used to track employment and education for the client.



The screenshot shows the HMIS-TRAAgencyAdmin application window. The title bar reads "HMIS-TRAAgencyAdmin". The menu bar includes "File", "View", "Report", and "Help". The address bar shows "Application: ADS_SA" and "Address: /centralintake/employment". The Navigator pane on the left lists various menu items, with "Employment-Education" selected. The main content area is divided into two sections: "Employment History" and "Education Programs".

Employment History Section:

- Consent: System
- Employer: Best Buy
- Date From: 12/03/2002
- Date To: 10/31/2007
- Address1: 1232 Congress
- City: Fontana
- State: CA
- County: San Bernardino
- Zip: 92408
- Hourly Wage: 11.00
- Interval: Twice a Mo
- Job Status: [Dropdown]

Education Programs Section:

- Consent: System
- School: San Bernardino Valley College
- Program: College
- Major/Course: Arts
- City: San Bernardino
- State: CA
- County: San Bernardino
- Certificate/Degree: A.A.
- Completed?: Yes

At the bottom of the window, there are buttons for "New", "Save", and "Delete" in both sections. The status bar at the very bottom shows "Lorena Lopez 1005309 System".

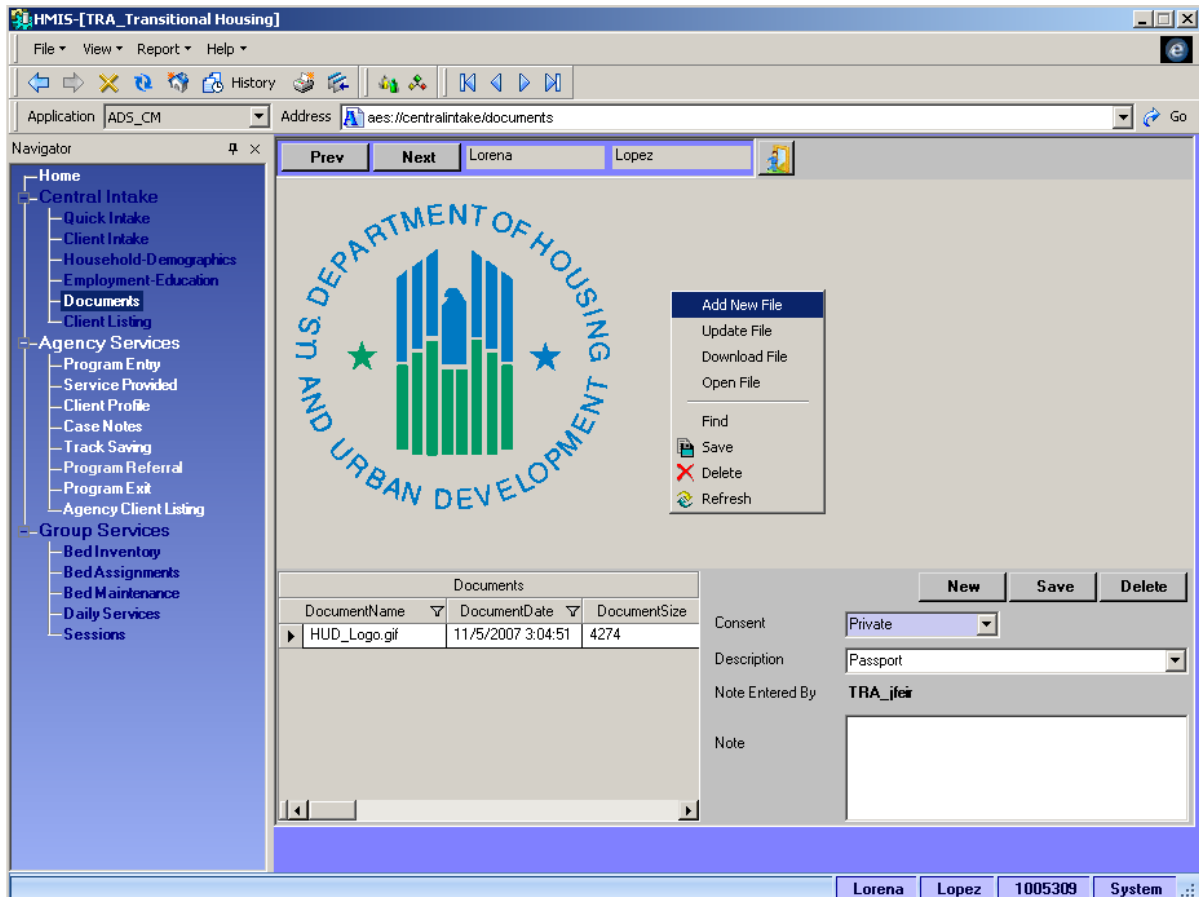
1. Make sure the correct client's name is at the bottom of the screen and click on **New** in either the Employment section or the Education section.
2. You must enter a **Date From** (beginning date of employment). For a current employer, leave **Date To** blank. All other fields are optional.
3. After entering a record, click on **Save**, then click on **New** to enter an additional record.
4. **NOTE:** None of the information entered on this screen affects the client's income at entry or exit.

Documents

Use this screen to add files from your computer to the client's file on HMIS, including scanned documents (driver's license, social security card, etc.) or Word or Excel files.

Make sure the correct client's name is at the bottom of the screen.

1. Right-click anywhere on the screen and select **Add New File**.



The screenshot shows the HMIS [TRA_Transitional Housing] interface. The main window displays the 'Documents' section for a client named Lorena Lopez. A context menu is open over the 'Documents' table, with 'Add New File' selected. The table shows a document named 'HUD_Logo.gif' with a size of 4274 bytes. The form below the table has fields for Consent (set to Private), Description (set to Passport), and Note Entered By (set to TRA_jfcir).

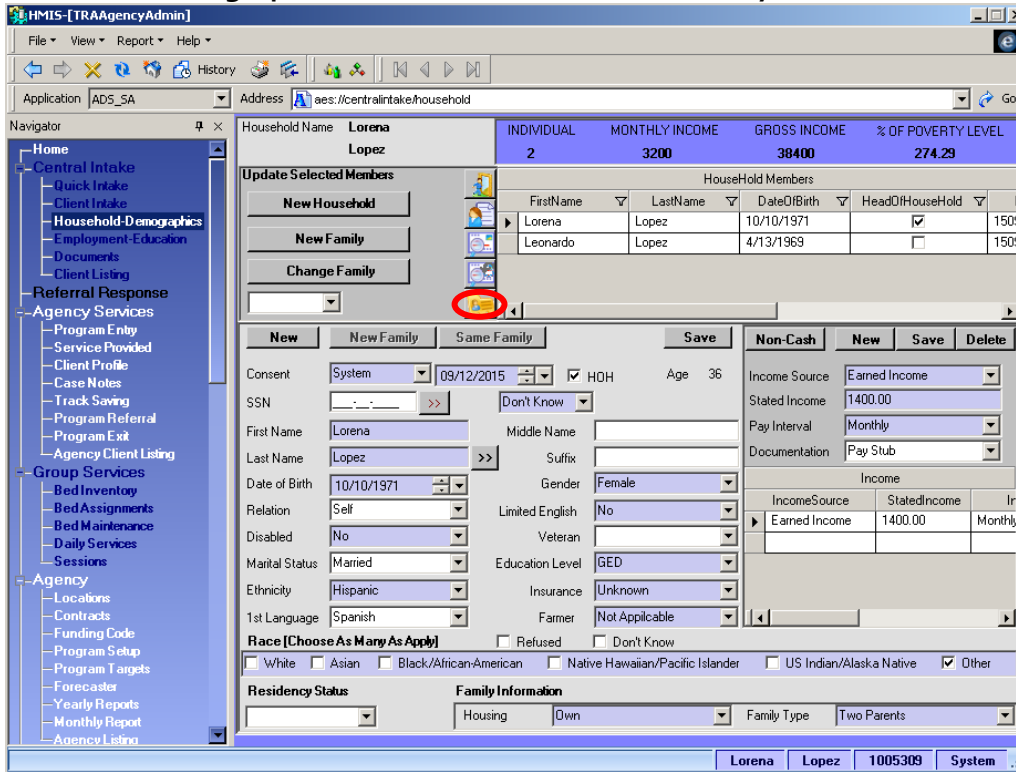
DocumentName	DocumentDate	DocumentSize
HUD_Logo.gif	11/5/2007 3:04:51	4274

Consent: Private
 Description: Passport
 Note Entered By: TRA_jfcir

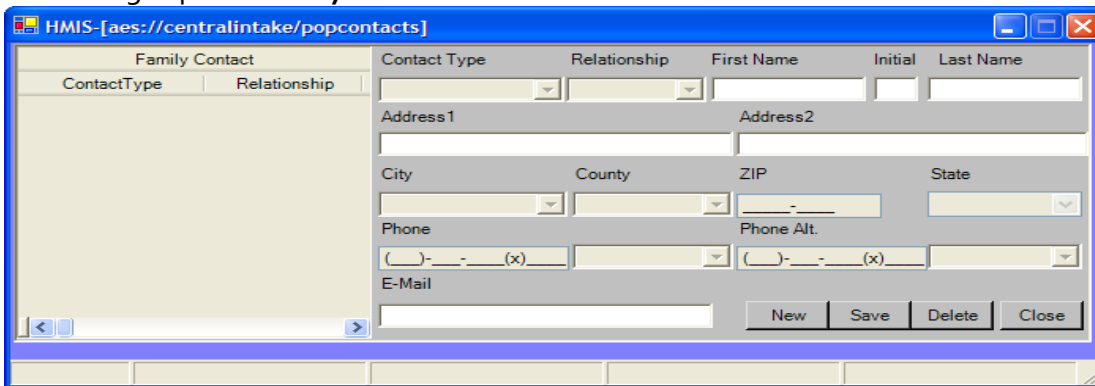
2. In the pop-up window, select the file name and click on **Open**.
 - Choose **Consent** level (usually System) and enter a **Description** and **Note** if desired.
 - Click on **Save**.
3. If you uploaded a scanned document, it will appear on the page.

Entering a Client's Family and Emergency Contact Information

1. In the Household Demographics screen, click on the "Add Family Contacts" button.



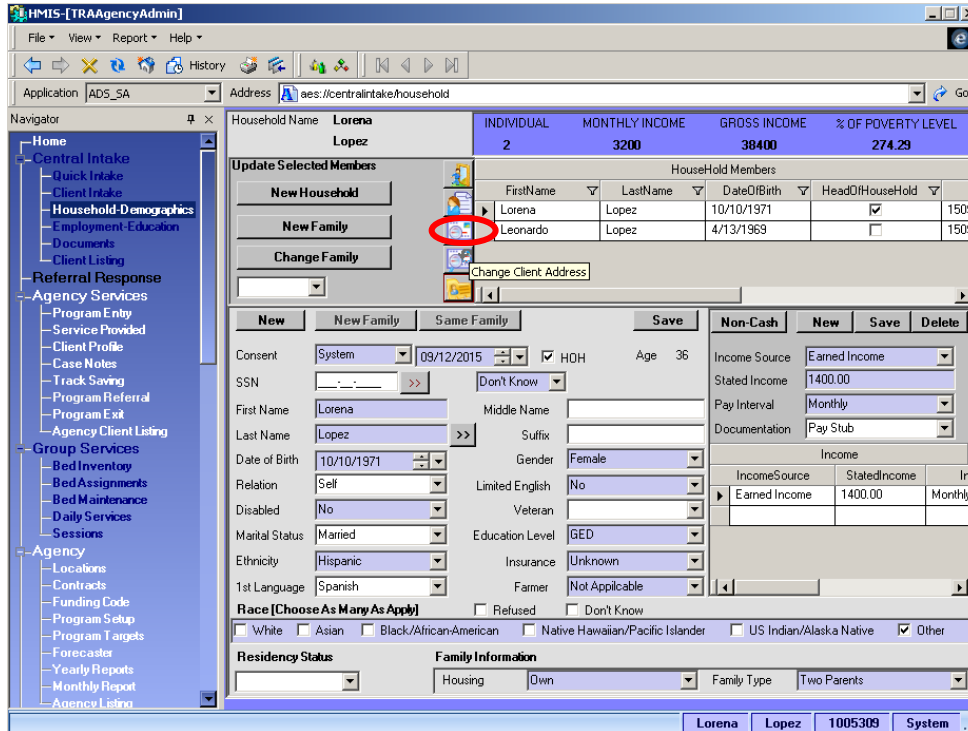
- This brings up the Family Contacts window:



- Click on **New**, enter the information, click on **Save** and **Close**.

Changing a Client's Last Known Permanent Address

- In the Household Demographics screen, click on the "Change Client Address" button.



HMIS - [TRAAgencyAdmin]

Application: ADS_SA Address: aes://centralintake.household

Navigator: Home, Central Intake, Client Intake, Household Demographics, Employment-Education, Documents, Client Listing, Referral Response, Agency Services, Group Services, Agency

Household Name: Lorena Lopez
 INDIVIDUAL: 2 MONTHLY INCOME: 3200 GROSS INCOME: 38400 % OF POVERTY LEVEL: 274.29

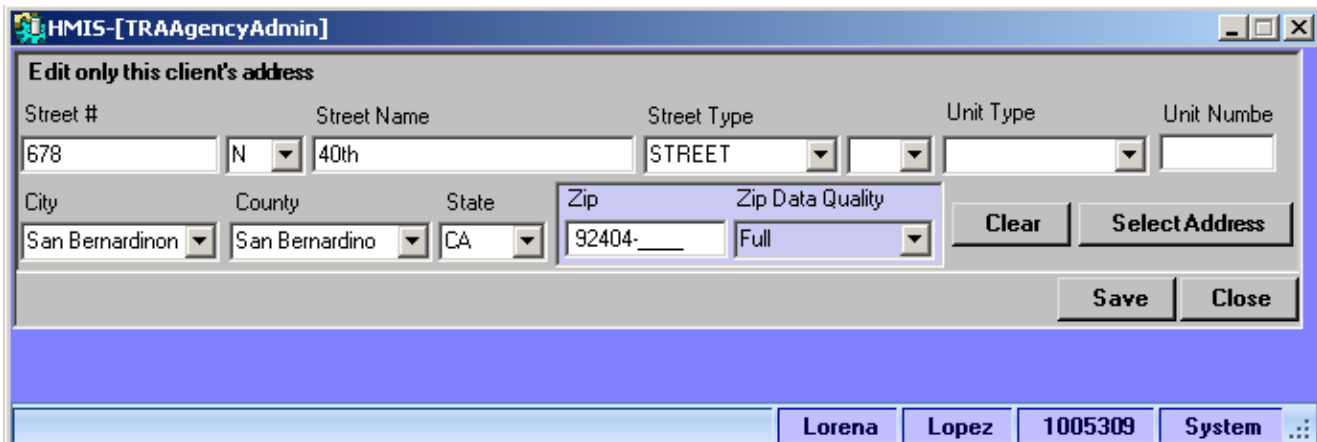
Update Selected Members

Household Members	FirstName	LastName	DateOfBirth	HeadOfHouseHold	Age
<input checked="" type="checkbox"/>	Lorena	Lopez	10/10/1971	<input checked="" type="checkbox"/>	36
<input type="checkbox"/>	Leonardo	Lopez	4/13/1969	<input type="checkbox"/>	1500

Consent: System Date: 09/12/2015 HOH: Age: 36 Income Source: Earned Income
 SSN: Stated Income: 1400.00 Pay Interval: Monthly Documentation: Pay Stub
 First Name: Lorena Middle Name: Last Name: Lopez Suffix: Gender: Female
 Date of Birth: 10/10/1971 Relation: Self Limited English: No Disabled: No Veteran: Marital Status: Married Education Level: GED
 Ethnicity: Hispanic Insurance: Unknown 1st Language: Spanish Farmer: Not Applicable
 Race: White Asian Black/African-American Native Hawaiian/Pacific Islander US Indian/Alaska Native Other
 Residency Status: Family Information: Housing: Own Family Type: Two Parents

Lorena Lopez 1005309 System

- This brings up the Address History window:



HMIS - [TRAAgencyAdmin]

Edit only this client's address

Street #: 678 Street Name: N 40th Street Type: STREET Unit Type: Unit Number:

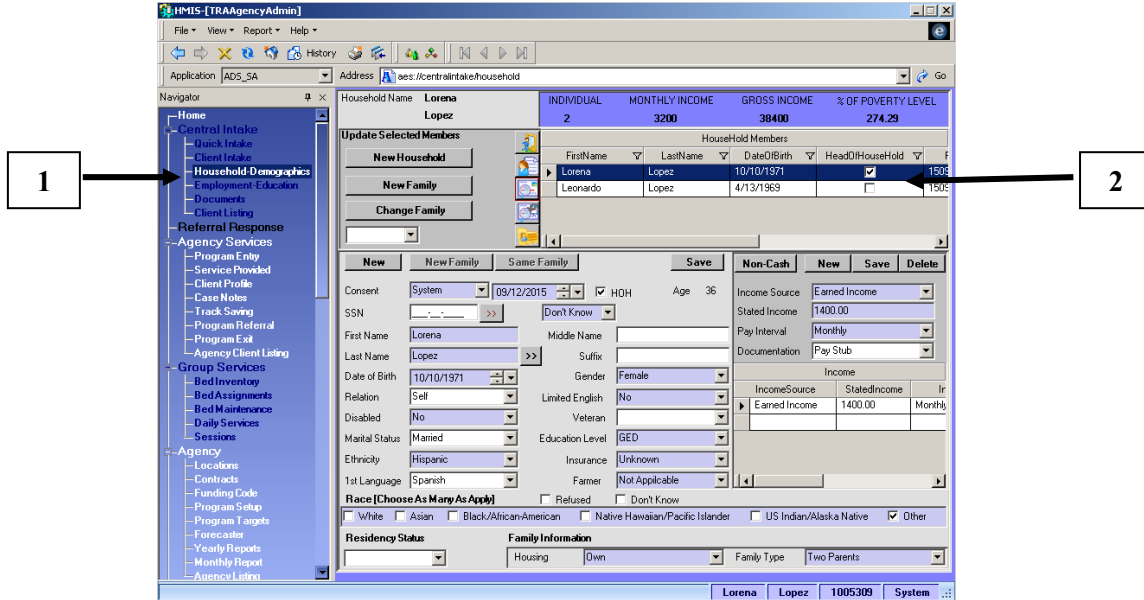
City: San Bernardino County: San Bernardino State: CA Zip: 92404- Zip Data Quality: Full

Lorena Lopez 1005309 System

- Enter the new address and click on OK.

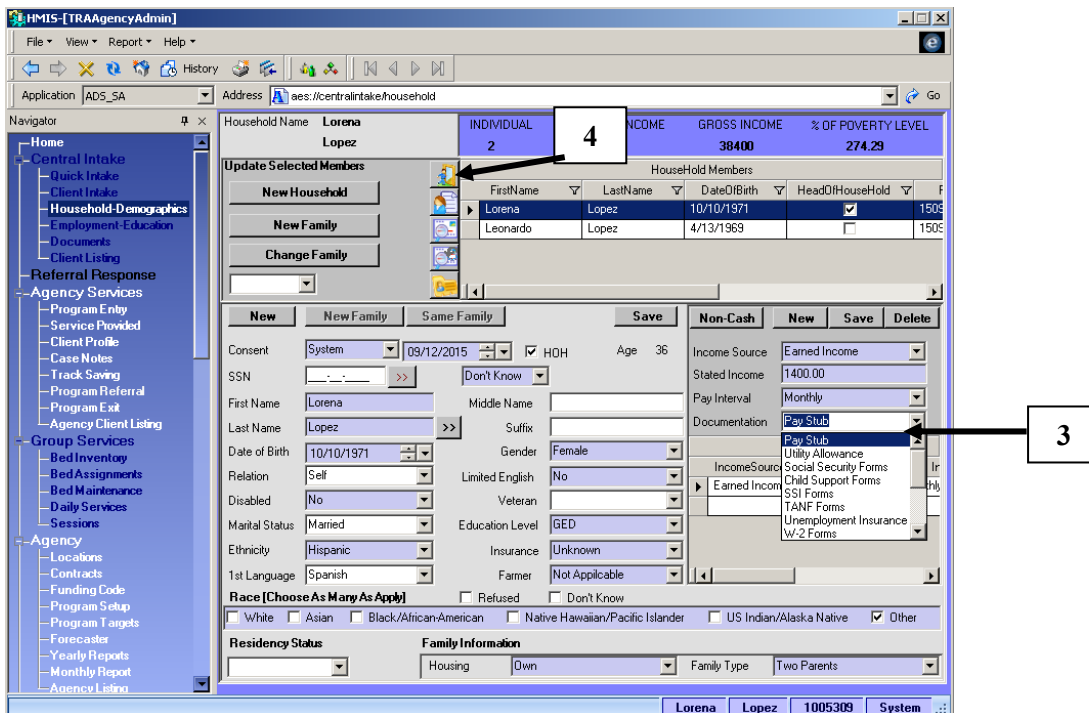
How to Make Changes to Income

- **Step 1 and 2:** To make changes to client income, find the client in **Client Listing**, then go to the **Household Demographics** screen and highlight your client in the grid of Household Members.



The screenshot shows the HMIS [TRAAgencyAdmin] interface. The left sidebar has a menu with 'Household Demographics' highlighted, indicated by a box labeled '1'. The main window displays the 'Household Demographics' screen for Lorena Lopez. At the top, there is a table with columns: 'INDIVIDUAL', 'MONTHLY INCOME', 'GROSS INCOME', and '% OF POVERTY LEVEL'. The row for Lorena Lopez is highlighted, with values 2, 3200, 38400, and 274.29 respectively. Below this is a 'Household Members' table with columns: 'FirstName', 'LastName', 'DateOfBirth', and 'HeadOfHousehold'. Lorena Lopez is highlighted in this table, indicated by a box labeled '2'. The bottom section of the screen contains various form fields for personal and family information, including SSN, First Name, Last Name, Date of Birth, Gender, Relation, Marital Status, Education Level, Ethnicity, 1st Language, Race, Residency Status, and Family Information.

- **Step 3:** Work within the Income Container (#3 below) to enter the new income or make any changes to existing income and non-cash benefits. Remember to click **New** and **Save** for each new income, or click **Save** after making changes to an existing income.




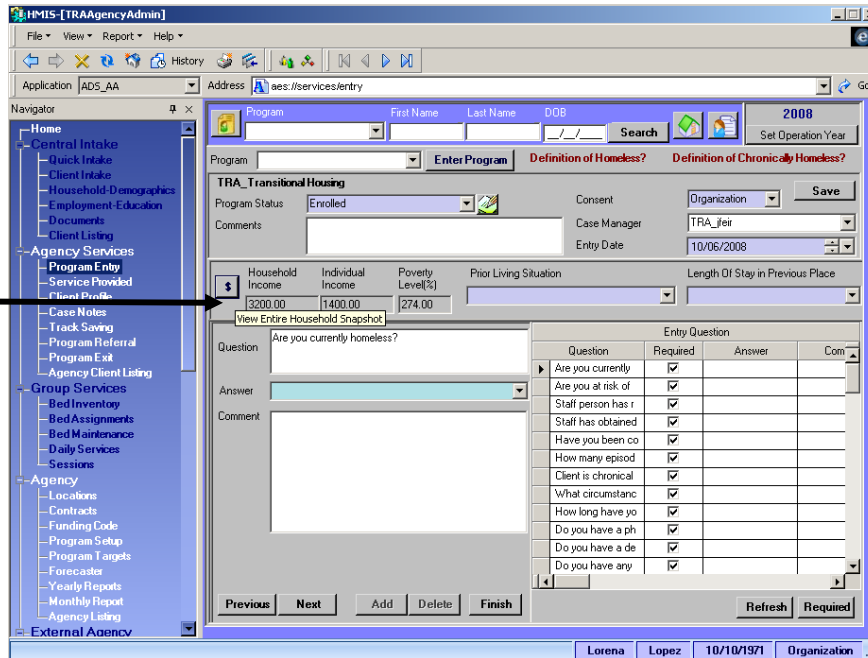
This screenshot is similar to the previous one but focuses on the 'Income Container' section. A box labeled '3' points to the 'Income Source' dropdown menu, which is open, showing a list of options including 'Earned Income', 'Utility Allowance', 'Social Security Forms', 'SSI Forms', 'TANF Forms', 'Unemployment Insurance', and 'W-2 Forms'. A box labeled '4' points to the 'Household Members' table, where Lorena Lopez is still highlighted. The rest of the form fields remain the same as in the previous screenshot.

- **Step 4:** Once all income changes have been made and saved, use the "Jump to Program Entry" button to take your client to the **Program Entry** screen in the **Agency Services** Library.



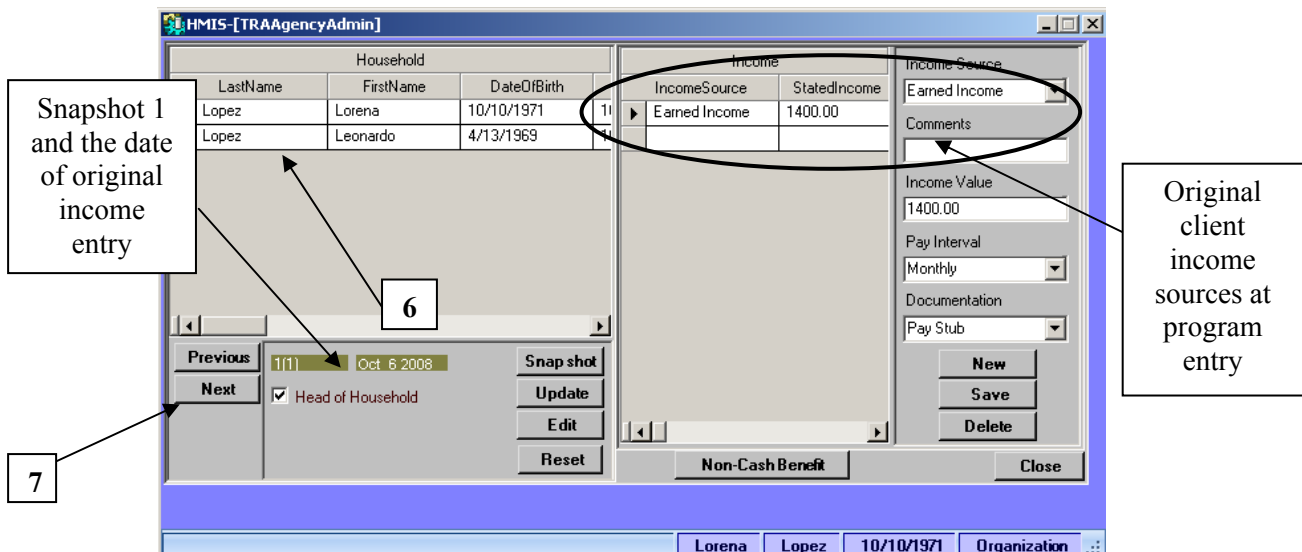
How to Make Changes to Income

- Step 5:** In the **Program Entry** screen with your client listed at the bottom of the screen, click on the Snapshot  button to open the pop-up window with income history.



The screenshot shows the HMIS [TRAAgencyAdmin] interface. The left sidebar contains a navigation menu with categories like 'Central Intake', 'Agency Services', and 'Group Services'. The main window displays the 'Program Entry' form for 'TRA_Transitional Housing'. A box with the number '5' points to the '\$' icon and 'View Entire Household Snapshot' button in the 'Household Income' section.

In this pop-up, the original client income at time of program entry will show as snapshot 1.



The screenshot shows the 'Household Income' pop-up window. It contains a table for household members and an 'Income' section. Annotations include:

- A box with 'Snapshot 1 and the date of original income entry' points to the '11' in the 'IncomeSource' column and 'Oct 6 2008' in the date field.
- A box with 'Original client income sources at program entry' points to the 'IncomeSource' field.
- A box with '6' points to the 'Snapshot' button.
- A box with '7' points to the 'Next' button.

- Click **Snapshot** (6) and then click **Next** (7) to create a new snapshot reflecting the changes you made in the **Household-Demographics** screen. (Snapshot pulls the data directly from the Household-Demographics screen.)

How to Make Changes to Income

Previous and Next buttons can be used to scroll through income history

Household				Income		Income Source
LastName	FirstName	DateOfBirth		IncomeSource	StatedIncome	Earned Income
Lopez	Lorena	10/10/1971	11	Earned Income	1400.00	
Lopez	Leonardo	4/13/1969	11			

Previous	111	Oct 6 2008	Snapshot
Next	<input checked="" type="checkbox"/>	Head of Household	Update
			Edit
			Reset

Income Source: Earned Income
 Income Value: 1400.00
 Pay Interval: Monthly
 Documentation: Pay Stub

Buttons: New, Save, Delete, Non-Cash Benefit, Close

Footer: Lorena Lopez 10/10/1971 Organization

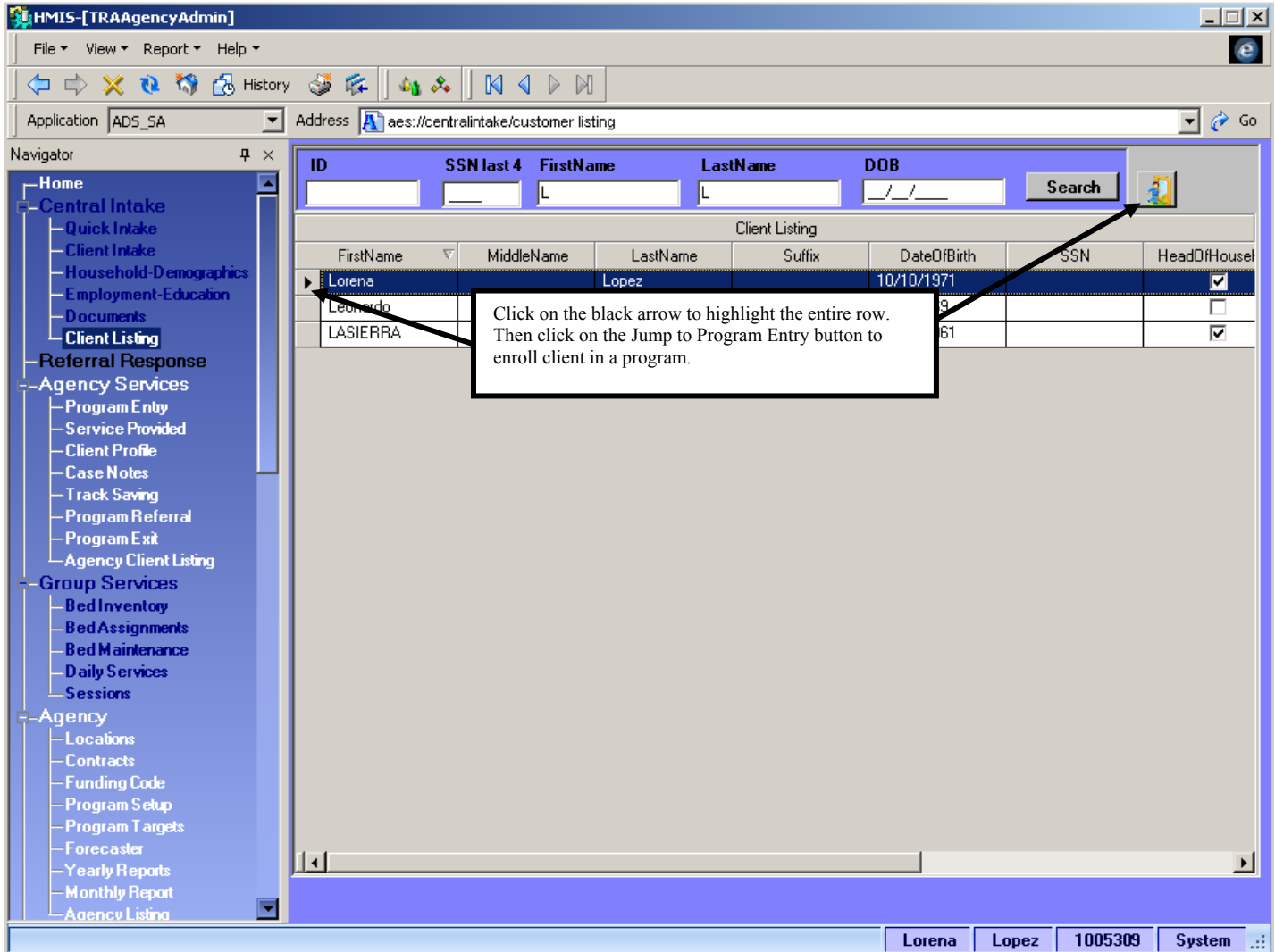
- Remember: Snapshot 1 will be income at entry into program. Whichever snapshot is the last Snapshot will be income at program exit.

A Note about Snapshots:

The system creates two pictures or "Snapshots" of the **Household Demographics** screen. Once when you enter a client in to a program at "**Program Entry**" which would be called "Snapshot 1" and second when you press the "**Begin Exit Process**" button in "**Program Exit**" which would be known as "Snapshot 2." If your exit income is the same as your entry income, then you wouldn't need to do anything. If your income has changed since Program Entry then you would need to complete **Step 5**.

VI. Program Entry

Before enrolling the client, you must first enter him/her in **Client Intake** and **Household Demographics**. If the client has already been entered in HMIS but not enrolled in a program, search for the client in the **Client Listing** screen, select the client's record, and click on the **Jump to Program Entry** shortcut button.



HMIS-[TRAgencyAdmin]
 Application: ADS_SA Address: aes://centralintake/customer listing

Search fields: ID, SSN last 4, First Name, Last Name, DOB

First Name	Middle Name	Last Name	Suffix	Date of Birth	SSN	Head of Household
Lorena		Lopez		10/10/1971		<input checked="" type="checkbox"/>
Leonardo				9		<input type="checkbox"/>
LASIERRA				61		<input checked="" type="checkbox"/>

Callout: Click on the black arrow to highlight the entire row. Then click on the Jump to Program Entry button to enroll client in a program.

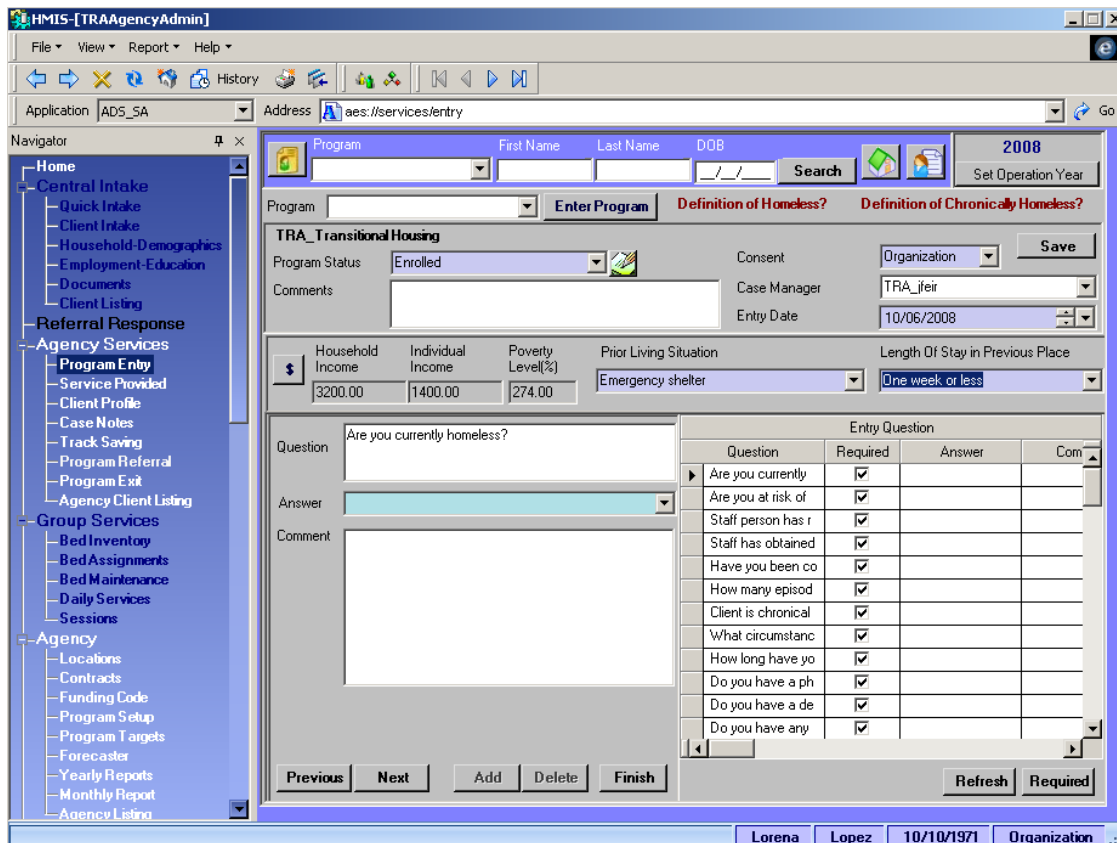
Status Bar: Lorena Lopez 1005309 System

Enrolling a Client in a Program using Client Intake

You still have the option of using Client Intake to enroll clients. If you use Client Intake, you will need to go to 3 different screens to enter information versus Quick Intake which contains Household Demographics, Program Entry and a portion of the Services Provided screen.

VI. Program Entry (continued)

Once you are in the Program Entry screen, you will be able to enroll a client in to a program.



The screenshot shows the HMIS-TRA Agency Admin software interface. The main form area is titled "Program Entry" and contains the following fields and sections:

- Program:** A dropdown menu showing "TRA_Transitional Housing".
- Program Status:** A dropdown menu showing "Enrolled".
- Consent:** A dropdown menu showing "Organization".
- Case Manager:** A dropdown menu showing "TRA_ifeir".
- Entry Date:** A date field showing "10/06/2008".
- Household Income:** A field showing "3200.00".
- Individual Income:** A field showing "1400.00".
- Poverty Level(%):** A field showing "274.00".
- Prior Living Situation:** A dropdown menu showing "Emergency shelter".
- Length Of Stay in Previous Place:** A dropdown menu showing "One week or less".
- Entry Question Table:** A table with columns for Question, Required, Answer, and Comment. The questions listed are:

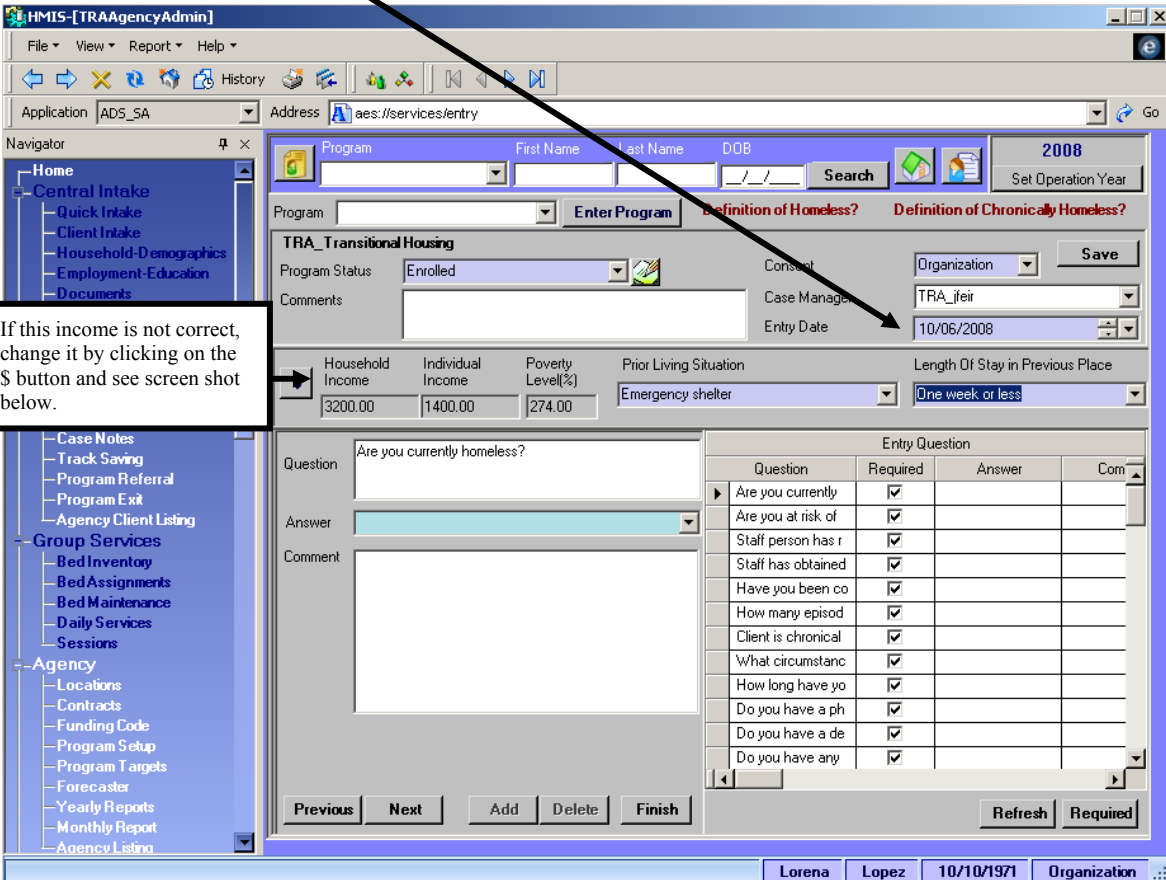
Question	Required	Answer	Com
Are you currently homeless?	<input checked="" type="checkbox"/>		
Are you at risk of	<input checked="" type="checkbox"/>		
Staff person has r	<input checked="" type="checkbox"/>		
Staff has obtained	<input checked="" type="checkbox"/>		
Have you been co	<input checked="" type="checkbox"/>		
How many episod	<input checked="" type="checkbox"/>		
Client is chronic	<input checked="" type="checkbox"/>		
What circumstanc	<input checked="" type="checkbox"/>		
How long have yo	<input checked="" type="checkbox"/>		
Do you have a ph	<input checked="" type="checkbox"/>		
Do you have a de	<input checked="" type="checkbox"/>		
Do you have any	<input checked="" type="checkbox"/>		

At the bottom of the screen, there are buttons for "Previous", "Next", "Add", "Delete", "Finish", "Refresh", and "Required". The status bar at the bottom shows "Lorena Lopez 10/10/1971 Organization ...".

1. Make sure the correct client's name is at the bottom of the screen.
2. **NOTE: All blue fields must be filled in.** In the **Program** field (see arrow above), select the correct program from the dropdown list and click on **Enter Program**. This fills in the **Program Status** (Enrolled), **Consent** (Organization), and **Case Manager**. It also pulls the income from **Household Demographics** and creates the Program Entry question bed.

VI. Program Entry (continued)

3. Change the **Program Entry Date** to the date the client was enrolled in the program, if not current date, and click on **Save**.




If this income is not correct, change it by clicking on the \$ button and see screen shot below.

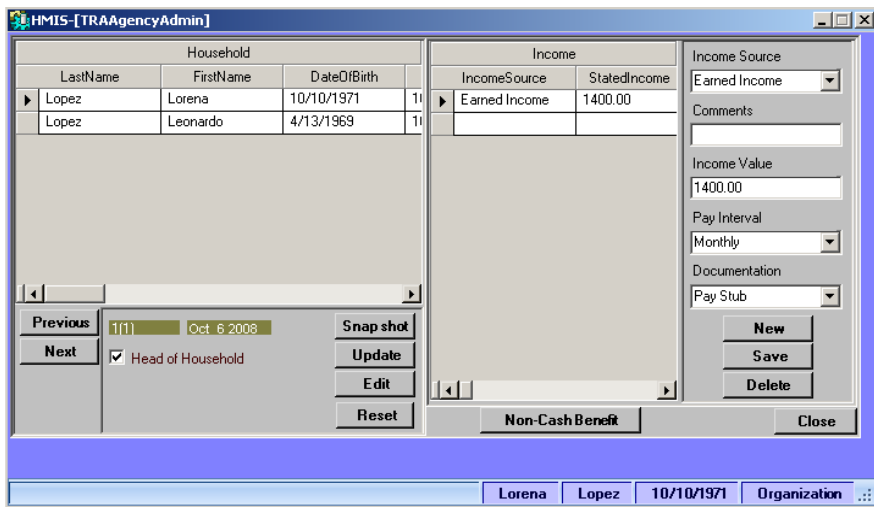
Household Income: 3200.00, Individual Income: 1400.00, Poverty Level(%): 274.00, Prior Living Situation: Emergency shelter, Length Of Stay in Previous Place: One week or less

Entry Date: 10/06/2008

Organization: TRA_iteir

Buttons: Previous, Next, Add, Delete, Finish, Refresh, Required

4. **Household Income:** This is the client's income at the time he/she entered the program, which is pulled over from **Household Demographics** when you click on **Enter Program**. If the income shown is not the correct income at program entry:
 - a. Click on the **Income Snapshot**  button to open the pop-up window with income history.



Household				Income		Income Source
LastName	FirstName	DateOfBirth		IncomeSource	StatedIncome	Earned Income
Lopez	Lorena	10/10/1971	11	Earned Income	1400.00	
Lopez	Leonardo	4/13/1969	11			

Income Source: Earned Income



Income Value: 1400.00

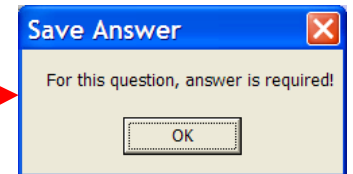
Pay Interval: Monthly

Documentation: Pay Stub

Buttons: Previous, Next, Snap shot, Update, Edit, Reset, Non-Cash Benefit, Close

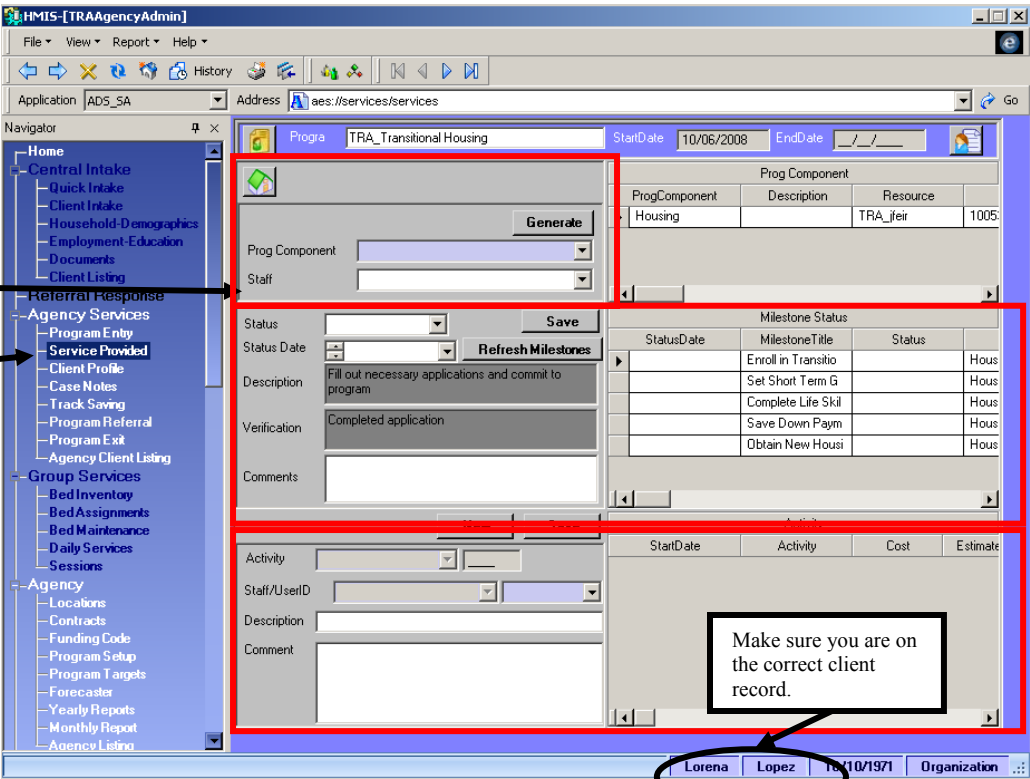
VI. Program Entry (continued)

- b. In the **Income** section on the right, click on the record you want to change, or click on **New** to add an additional record.
 - c. Click on **Save** and **Close**. The new income should now appear on the **Program Entry** screen.
5. **Prior Living Situation** (client's situation immediately prior to entering your program) and **Length of Stay in Previous Place**: Select answers from the dropdown list.
 6. Click on **Save** (top right corner of window).
 7. Click on **Required** (at bottom right corner of screen) to shrink the Program Entry question list to only the required questions. (To view all questions, click on **Refresh**.)
 8. Answer each question using the dropdown arrow. **If your program is HUD-funded**, you must select an answer from the dropdown list; do not type in a different answer. If the **Add** button is available for a particular question, you can give multiple answers to that question.
 9. After selecting an answer, click on **Next** at the bottom of the screen. This allows the program to skip questions that don't apply to that client based on the previous answer.
 10. If you click on **Next** and nothing happens, you have reached the end of the question list. Click on **Finish**.
 - If an error message pops up, you skipped a required question. 
 - Click on **OK**. The unanswered question will be highlighted in the Entry Question grid on the right. Select the answer and click on **Finish**.
 - **IMPORTANT NOTE:** If you continue to get this error message after all program entry questions have been answered, one of the required questions in the **Household Demographics** screen was not answered for this client. Click on the **Jump to Demographics** button. 
 - Once in **Household Demographics**, fill in all the blue fields, click on **Save** and click on **Jump to Program Entry**.
 11. Click on **Save**.



VII. Service Provided

Once you have entered the client in to a program, now you can record milestone statuses and keep track of what services were given to the client during the program.



The screenshot shows the HMIS [TRAAgencyAdmin] interface. The left-hand navigation menu is visible, with 'Service Provided' selected under 'Agency Services'. The main form area contains fields for 'Prog Component', 'Staff', 'Status', 'Status Date', 'Description', 'Verification', and 'Comments'. A 'Generate' button is located above the 'Prog Component' dropdown. The right-hand side of the interface displays a 'Milestone Status' table with columns for 'StatusDate', 'MilestoneTitle', and 'Status'. The first row of the table is highlighted with a red box and labeled with a callout box containing the number '3'. A callout box containing the number '2' points to the 'Generate' button. A callout box containing the number '1' points to the 'Service Provided' menu item. A callout box at the bottom right of the interface contains the text: 'Make sure you are on the correct client record.' The bottom status bar shows the user 'Lorena Lopez' and the date '10/10/1971'.

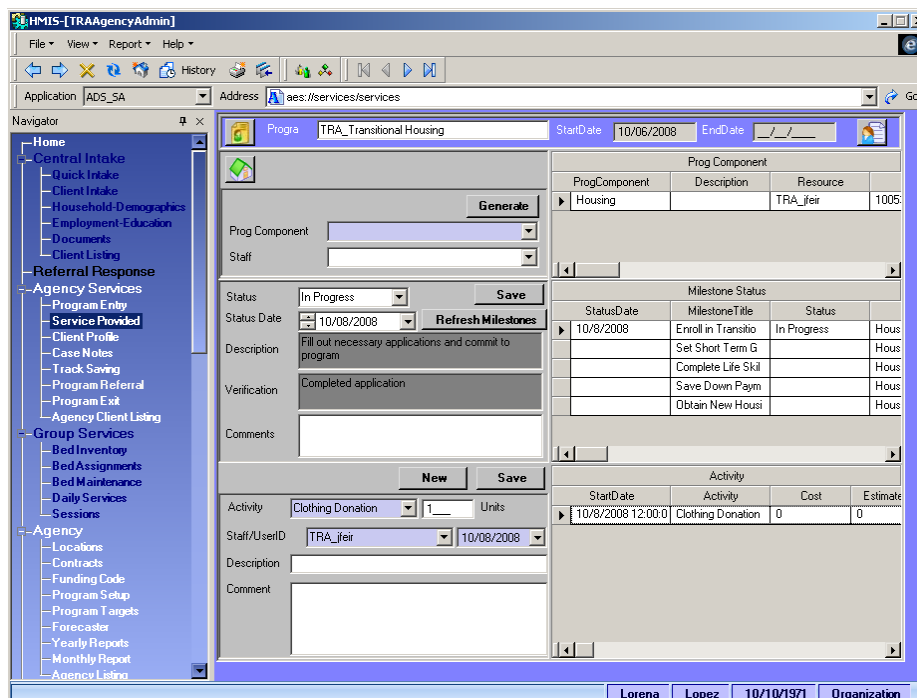
- Click on the **Service Provided** screen.
- Select the **Consent (Organization)**, **Program Component**, and **Staff** using the dropdown menus, then click on **Generate**. This moves the program component over to the right and "generates" milestones for that client.
 - Milestones** are pre-set goals the client must reach to successfully complete your program. Not all milestones are applicable to all clients, and each program component has its own milestones.
 - Activities** are pre-set services your agency provides that enable clients to reach those milestones.
- Click on the first milestone in the Milestone Status grid on the right (#2 in screen shot above) and select a **Status** and **Status Date** for that milestone on the left. **NOTE:** Every milestone must have a **Status** and **Status Date** before exiting a client. However, when first enrolling the client, you will probably only have a status and status date for the first milestone.
 - Status:** Select **Complete**, **In Progress**, **Unsuccessful** (client attempted but did not complete the milestone), or **N/A** (the milestone did not apply to that client or the client left the program before attempting to complete the milestone).

- **Status Date:** This can be any date between the date the client enrolled and the date they are exited from your program.
 - Click on **Save** next to the **Status** field.
4. Repeat this process for every milestone that is **Complete, In Progress, or Unsuccessful**. When finished, you will return to each of these milestones and add any **activities (services)** your agency provided to help the client achieve them. (**Important:** Read through **NOTES** section below before adding activities.)

NOTES:

- HUD needs to see every activity (service) that your agency provided to a client. However, the units and cost aren't important to HUD; they are for internal use by your organization for program evaluation. For HUD purposes, entering ONE instance of every service you provided is sufficient. For example, you can select one milestone and make one entry for ALL case management services provided to the client.
- If your agency wants more accurate information, you can also make a summarizing entry every two weeks or once a month and change the units to reflect the actual units provided for that period. For example, for the activity "Case Management," you would enter the total minutes of case management provided that month.
- If an activity was provided that doesn't fit any particular milestone, select your "bottom line" milestone (such as, "Client will obtain permanent housing") and enter the activity there.
- Select the **Staff** person and a date (any date between program entry and program exit is okay), enter a **Description**, then click on **Save**.

5. Select the first milestone in the Milestone Status grid. If you provided services intended to help the client achieve this milestone, click on **New** in the **Activity** section (see #3 in screen shot above) and select an activity from the dropdown list. The units or cost of that activity are predetermined and will fill in automatically.



The screenshot shows the HMIS software interface for a user named Lorena Lopez. The main window displays the 'Service Provided' form for a client in the 'TRA_Transitional Housing' program. The form includes the following fields and data:

- Program Component:** Housing
- Staff:** TRA_ifeir
- Status:** In Progress
- Status Date:** 10/08/2008
- Description:** Fill out necessary applications and commit to program
- Verification:** Completed application
- Comments:** (Empty)

Below the form are two tables:

Milestone Status			
StatusDate	Milestone Title	Status	Hous
10/8/2008	Enroll in Transilio	In Progress	Hous
	Set Short Term G		Hous
	Complete Life Skil		Hous
	Save Down Paym		Hous
	Obtain New Hous		Hous

Activity			
StartDate	Activity	Cost	Estimate
10/8/2008 12:00:0	Clothing Donation	0	0


6. To add additional activities for the same milestone, click on **New**.
7. To add activities for a different milestone, click on that milestone in the **Milestone Status** grid and repeat Step 2.

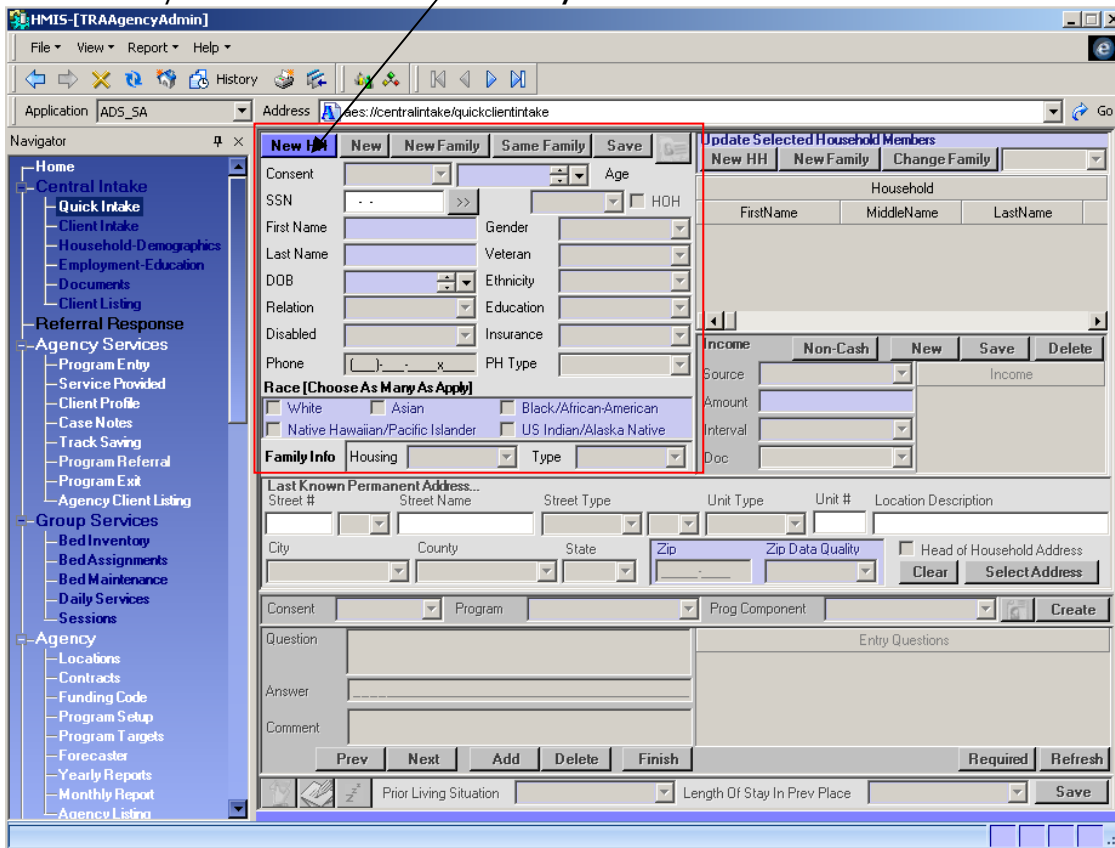
VIII. How to Enter a Client in Quick Intake

Quick Intake

The Quick Intake screen is a combination of the Client Intake, Household Demographics, Program Entry and a portion of the Services Provided screen. The purpose of Quick Intake is to streamline the entry process. This screen allows for a single point of client entry and enrollment as well as generating the milestones.

Adding A New Client To HMIS Using Quick Intake

1. Click on the **New HH** button .
2. The **Consent Level** will default to "System." The Consent Date will default to seven years from today's date. **Please do not modify the Consent field.**

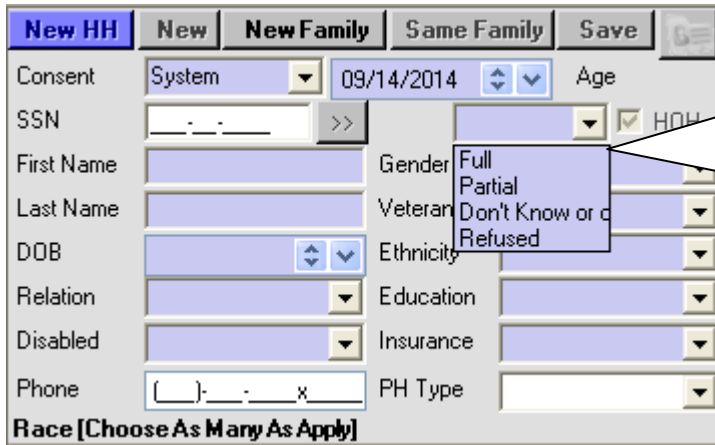


The screenshot shows the HMIS-TRA Agency Admin interface. The 'New HH' button is highlighted with a red box. The form contains the following sections:

- Consent:** Consent Level (System), Consent Date (7 years from today), Age.
- Personal Info:** SSN, First Name, Last Name, DOB, Gender, Veteran, Ethnicity, Education, Insurance, PH Type, Race (White, Asian, Black/African-American, Native Hawaiian/Pacific Islander, US Indian/Alaska Native).
- Family Info:** Housing, Type.
- Address:** Last Known Permanent Address (Street #, Street Name, Street Type, Unit Type, Unit #, Location Description, City, County, State, Zip, Zip Data Quality, Head of Household Address).
- Program Info:** Program, Program Component, Create.
- Entry Questions:** Question, Answer, Comment.
- Navigation:** Prev, Next, Add, Delete, Finish, Required, Refresh.
- Footer:** Prior Living Situation, Length Of Stay In Prev Place, Save.

How to Enter a Client in Quick Intake

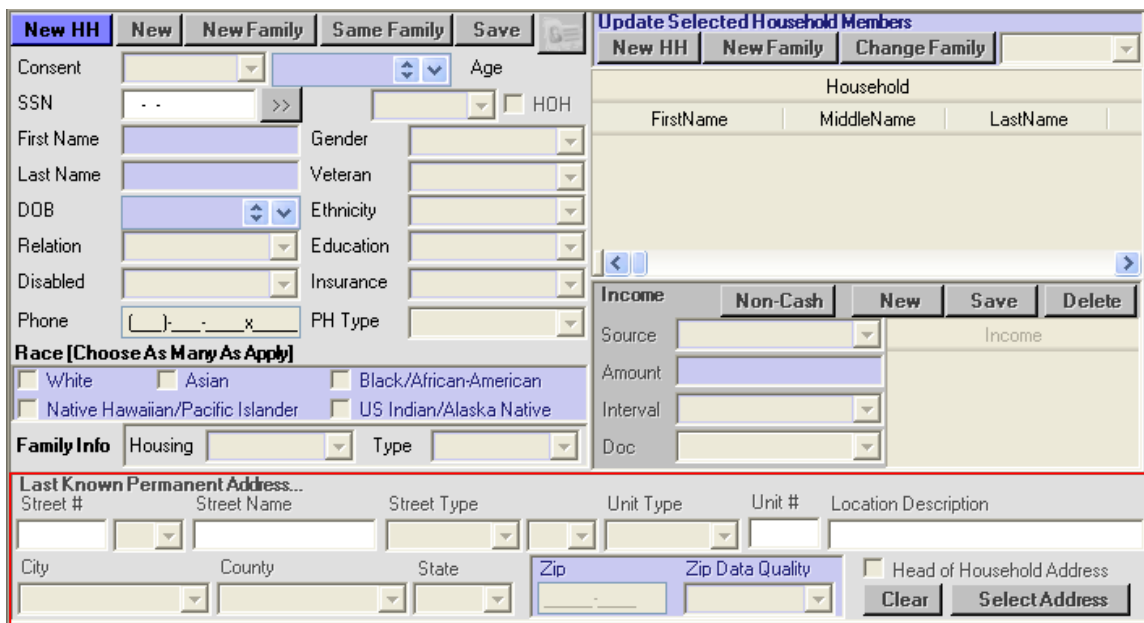
- Enter the Social Security Number in the **SSN** field. If you have a complete Social Security number, enter it in the SSN Field and choose "Full" from the dropdown list.



The screenshot shows the 'New HH' form with the SSN field highlighted. A dropdown menu is open, showing the following options: Full, Partial, Don't Know or Refused. The SSN field contains the characters '- -' followed by a right arrow button. Other fields like First Name, Last Name, DOB, and Relation are also visible.

If you only have the correct last 4 digits, enter them in the last space of the SSN field and choose **Partial** from this dropdown list. If you do not have a SSN, leave the SSN field blank and choose "Don't Know" or "Refused."

- Finish entering the rest of the required (purple) fields and Phone & PH Type if necessary.
- Select **Race**.
- Select **Housing** and **Type** from **Family Info** section.

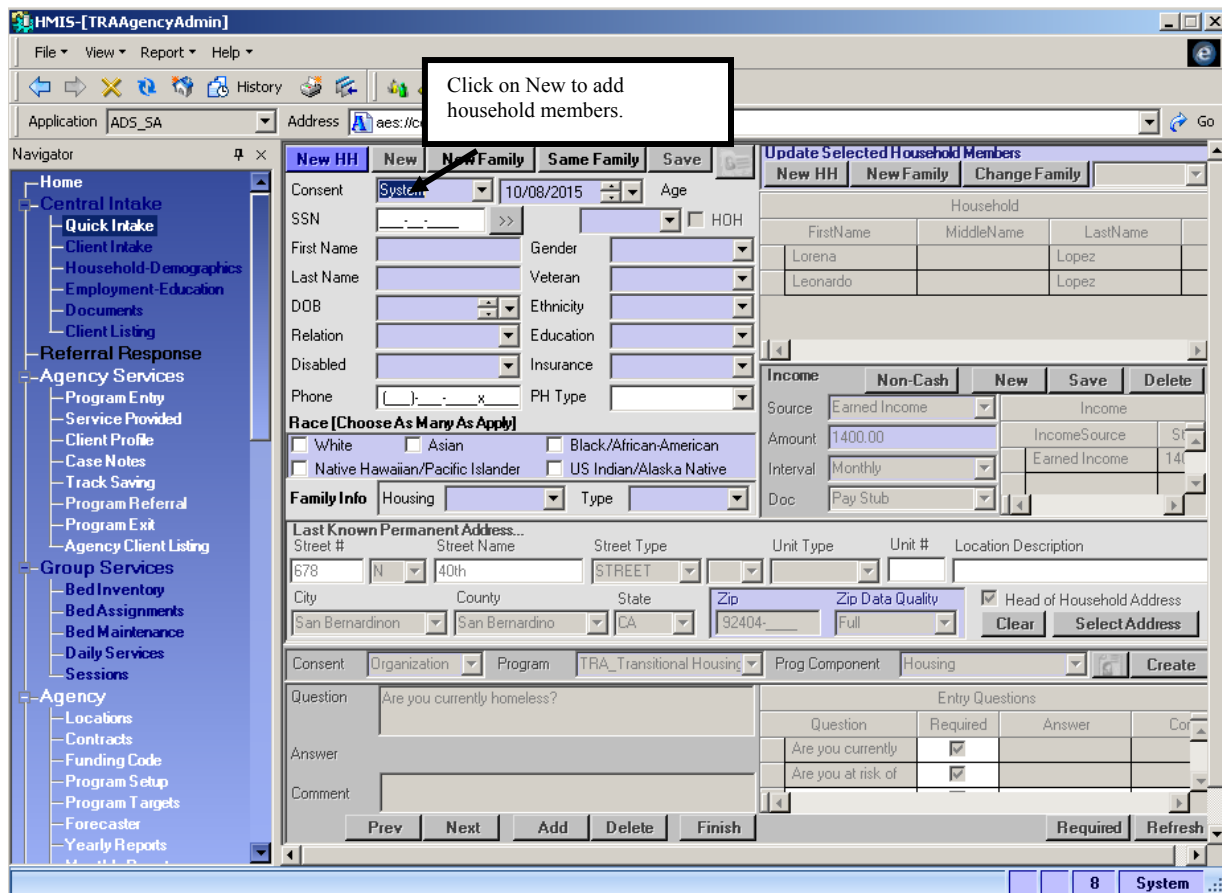


The screenshot shows the 'New HH' form with the 'Last Known Permanent Address...' section highlighted in red. This section includes fields for Street #, Street Name, Street Type, Unit Type, Unit #, Location Description, City, County, State, Zip, and Zip Data Quality. There are also 'Clear' and 'SelectAddress' buttons. Other sections like 'Race' and 'Family Info' are also visible.

- Complete the **Last Known Permanent Address** container. Note: The **Zip** field is not required, but the **Zip Data Quality** field is required.
- Click "**New Family**" to save the Head of Household Record entered.

Adding Additional Members to the Same Family or New Family in Quick Intake

There are a few things to consider when adding additional family members to an already existing household. Ask these questions: Are they a member of the same family or will they be a member of a new family within the same household? The concept here is that you can have many families within a single household. Keep this in mind and it will help you to differentiate between the "New Family" and "Same Family" buttons.



The screenshot shows the HMIS-TRAAgencyAdmin application window. The 'New' button in the 'New HH' section is highlighted with a callout box that says "Click on New to add household members." The form contains the following sections:

- Consent:** System, 10/08/2015, Age, HOH
- Personal Info:** SSN, First Name, Last Name, Gender, Veteran, DOB, Ethnicity, Education, Insurance, PH Type, Disabled, Relation, Education, Insurance, PH Type, Phone.
- Race [Choose As Many As Apply]:** White, Asian, Black/African-American, Native Hawaiian/Pacific Islander, US Indian/Alaska Native.
- Family Info:** Housing, Type.
- Last Known Permanent Address...:** Street # (678), Street Name (40th), Street Type (STREET), Unit Type, Unit #, Location Description, City (San Bernardino), County (San Bernardino), State (CA), Zip (92404), Zip Data Quality (Full), Head of Household Address (checked).
- Income Table:**

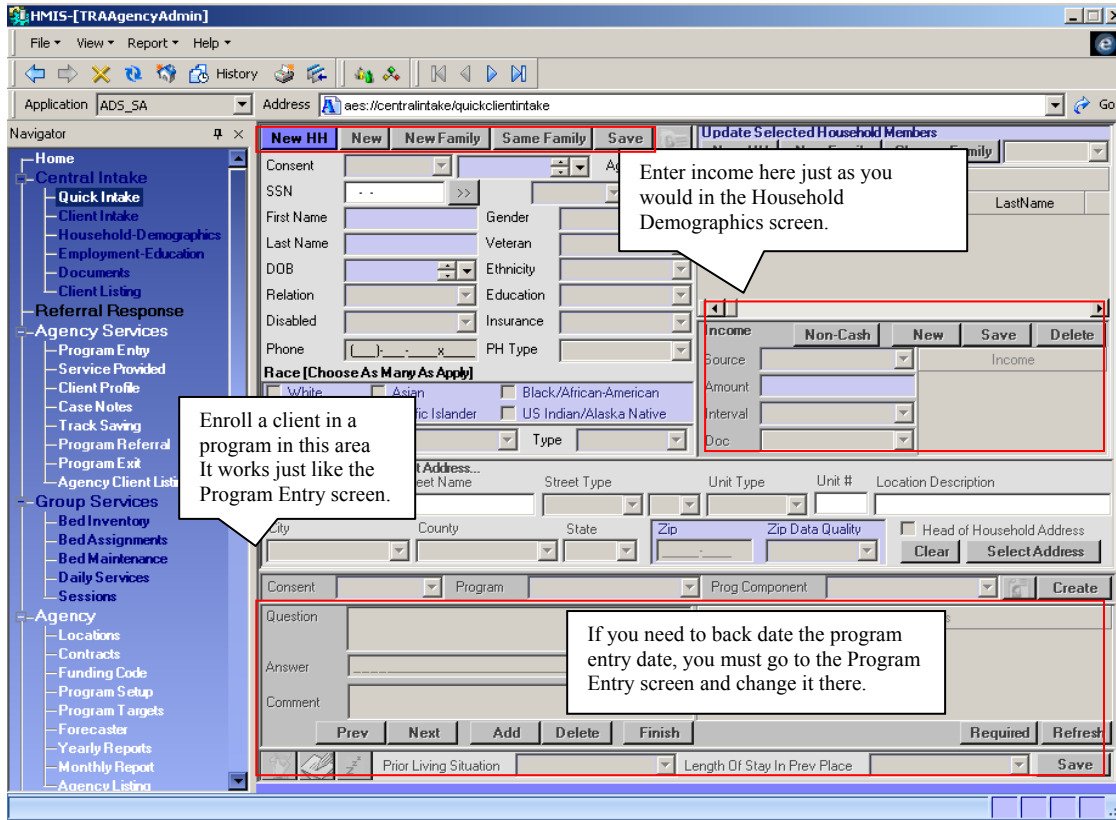
Source	Amount	Interval	Doc	IncomeSource	St
Earned Income	1400.00	Monthly	Pay Stub	Earned Income	14
- Entry Questions:**

Question	Required	Answer	Cor
Are you currently homeless?	<input checked="" type="checkbox"/>		
Are you at risk of	<input checked="" type="checkbox"/>		

1. Click on "New"
2. Enter all of the required blue fields.
3. When finished entering all required fields, click on the "Same Family" or "New Family" button.

Enrolling a Client in a Program using Quick Intake

The lower third of the screen is where you will enroll your client into a program. Enter all fields as you would normally do in the Program Entry screen. Note: If you need to back date the program entry date, you must go to the Program Entry screen and do it there.



The screenshot shows the HMIS [TRAAgencyAdmin] interface. The left sidebar contains a navigation menu with categories like Home, Central Intake, Referral Response, Agency Services, Group Services, and Agency. The main window displays the 'Quick Intake' form, which is divided into several sections:

- Top Section:** Includes 'New HH', 'New', 'New Family', 'Same Family', and 'Save' buttons. A callout points to the 'Income' field, stating: "Enter income here just as you would in the Household Demographics screen."
- Middle Section:** Contains personal and demographic information fields such as SSN, First Name, Last Name, Gender, Veteran, DOB, Ethnicity, Relation, Education, Insurance, PH Type, and Race (with checkboxes for White, Asian, Black/African-American, and US Indian/Alaska Native).
- Bottom Section:** Features a 'Program' dropdown menu and a 'Create' button. A callout points to this area, stating: "Enroll a client in a program in this area. It works just like the Program Entry screen." Below this, there are fields for 'Question', 'Answer', and 'Comment', along with 'Prev', 'Next', 'Add', 'Delete', 'Finish', 'Required', and 'Refresh' buttons.

At the bottom of the form, there are additional fields for 'Prior Living Situation' and 'Length Of Stay In Prev Place', with a 'Save' button.

Enrolling a Client in a Program using Quick Intake

Explanation of **New/Same Family** buttons in **Quick Intake**:



New HH - Establishes a new Head of Household (HH). You use **New HH** when entering the head of household (HH). Usually this will be the first person that you are enrolling.

New - You will use this button when adding a family member and every subsequent family member thereafter to the household.

New Family - Click on the **New Family button** to establish Head of Household's new family. This button really acts as your save button after adding a new Head of Household. It can also be used to signify the beginning of a new family if you have multiple families in a single household.

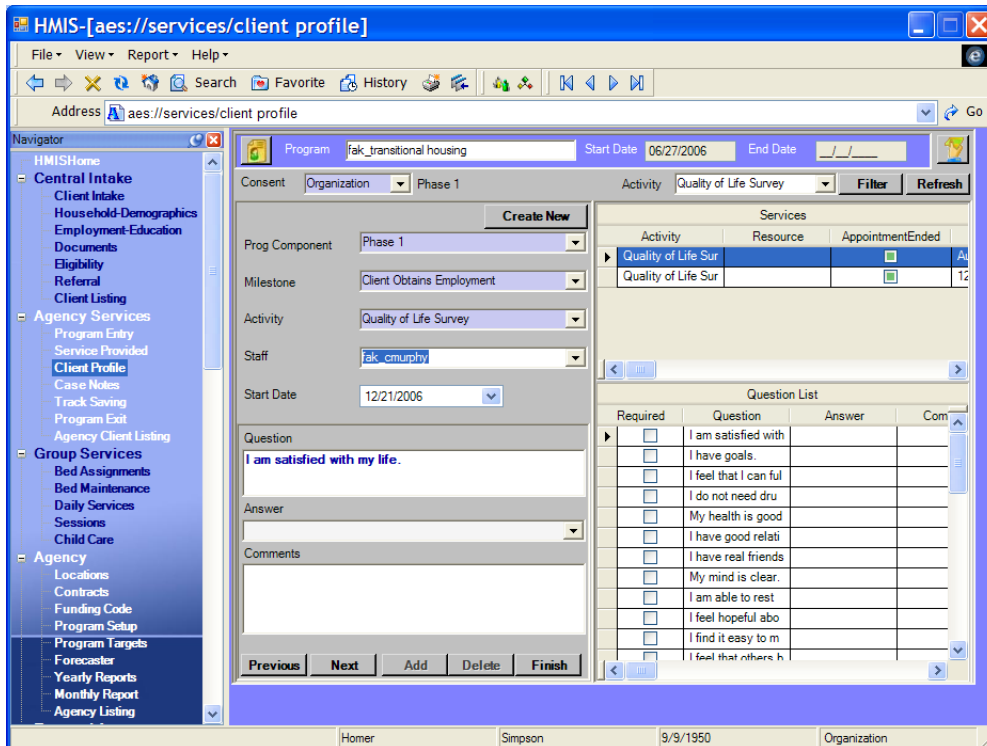
Same Family – Saves the person into the household into the "same family" as the Head of Household. For example: You are adding a child to the Head of Household. You would click "**NEW**" to add the child and then you would click on "**Same Family**" to signify that the child belongs to the same family with the Head of Household.

Save – After all household members have been added and you are finished, click on the **Save** button overall to save everything in that container or anytime a change is made to the existing record.

IX. Additional Screens

Client Profile

This is a customized question bed, used for pre- and post-tests and miscellaneous questionnaires as requested by individual agencies. It functions similar to the Program Entry screen.



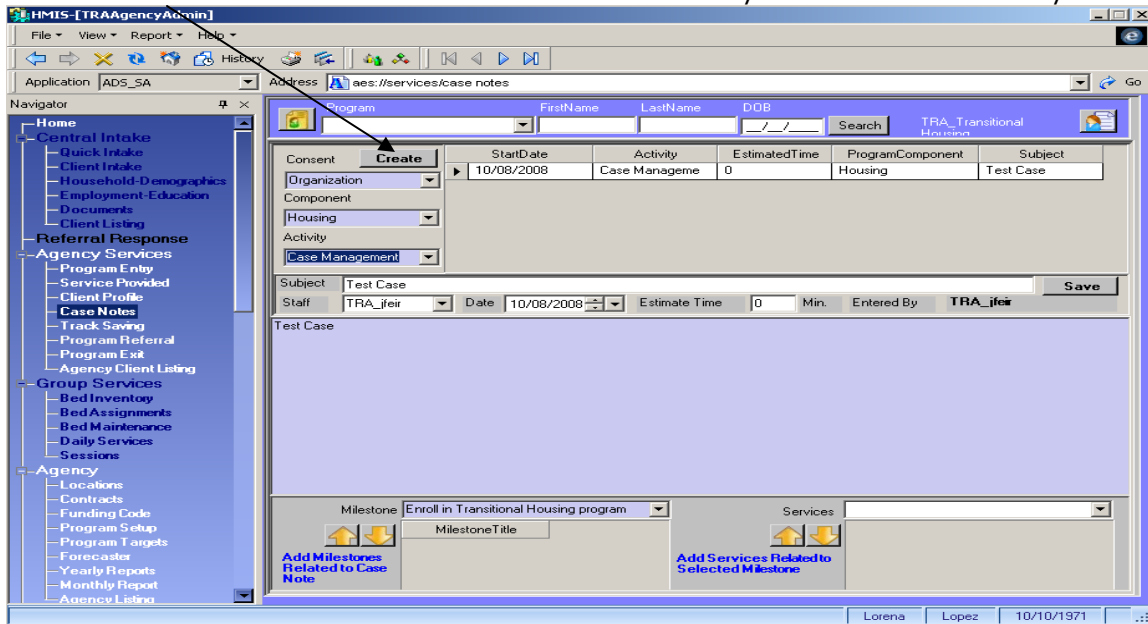
The screenshot shows the HMIS Client Profile screen. The interface includes a navigation pane on the left with categories like Central Intake, Agency Services, Group Services, and Agency. The main area is titled 'Program' and shows details for 'fak_transitional housing'. It includes fields for Start Date (06/27/2006) and End Date. Below this, there are dropdown menus for 'Consent' (Organization), 'Phase 1', and 'Activity' (Quality of Life Survey). A 'Filter' button is visible. The 'Services' table shows two rows for 'Quality of Life Sur'. The 'Question List' table contains several questions with checkboxes for 'Required' and columns for 'Question', 'Answer', and 'Com'. The first question is 'I am satisfied with my life.' The bottom of the screen has buttons for 'Previous', 'Next', 'Add', 'Delete', and 'Finish'. The status bar at the bottom shows 'Homer', 'Simpson', '9/9/1950', and 'Organization'.

1. Make sure the correct client's name is at the bottom of the screen.
2. Select **Consent** (Organization) and **Activity** (questionnaire name) at the top of the screen and click on **Filter**. This brings up the question bed.
3. Complete the remaining blue fields using the dropdown menus.
4. Answer each question as you would in the Program Entry screen, clicking on **Next** after each answer. After answering the last question, click on **Finish** to save your answers.

Case Notes

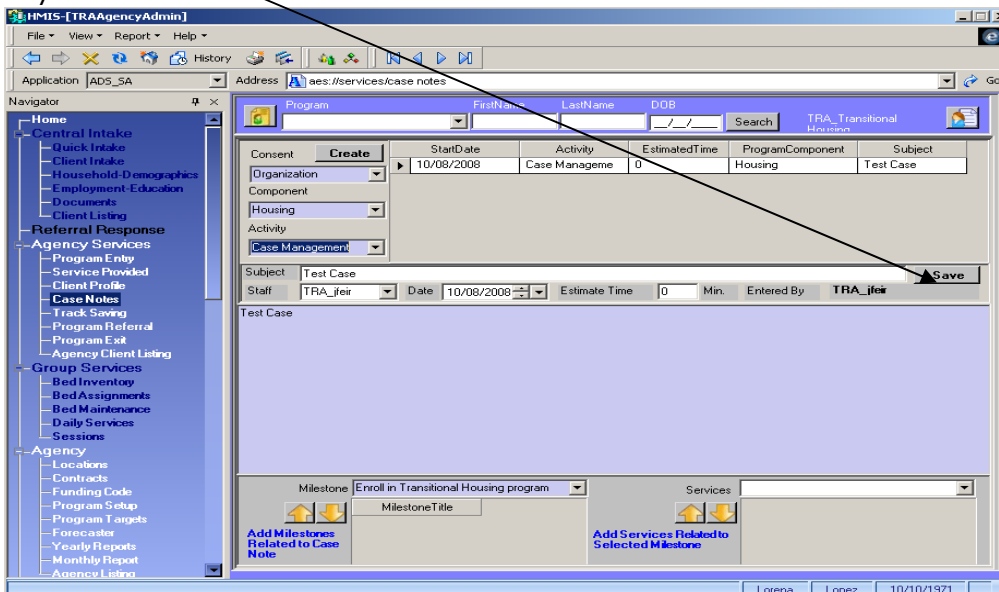
Adding a Case Note

1. Click on the **Consent** dropdown and choose your consent level.
2. Click on the **Component** dropdown and choose the component.
3. Click on the **Activity** dropdown and choose the Activity. This will usually say "Case Note" or "Note."
4. Click on **Create**. You will now see a blank case note entry under the Note History container.



The screenshot shows the HMIS [TRAAgencyAdmin] application. The left sidebar contains a navigation tree with categories like Central Intake, Referral Response, Agency Services, Group Services, and Agency. The main window displays the 'Create' form for a case note. The form has several dropdown menus: Consent (set to 'Create'), Organization, Component (set to 'Housing'), and Activity (set to 'Case Management'). The StartDate is 10/08/2008, EstimatedTime is 0, ProgramComponent is Housing, and Subject is Test Case. A 'Create' button is highlighted with an arrow. Below the form is a large blue text area for the note content. At the bottom, there are sections for Milestone (Enroll in Transitional Housing program) and Services.

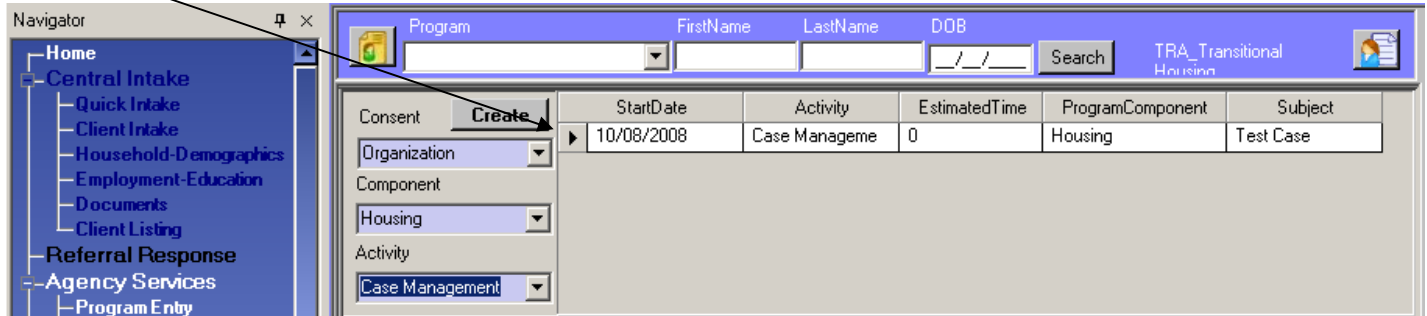
5. In the next section underneath **Note History**, enter the **Subject, Staff Initials, Date** and **Estimate Time**.
6. Click your mouse in the open blue space and begin typing your notes.
7. Click on **Save** when finished.



This screenshot is identical to the previous one, showing the 'Create' form for a case note. The 'Save' button is now highlighted with an arrow, indicating the next step in the process. The form fields remain the same: Consent (Create), StartDate (10/08/2008), Activity (Case Manage), EstimatedTime (0), ProgramComponent (Housing), and Subject (Test Case).

Case Notes

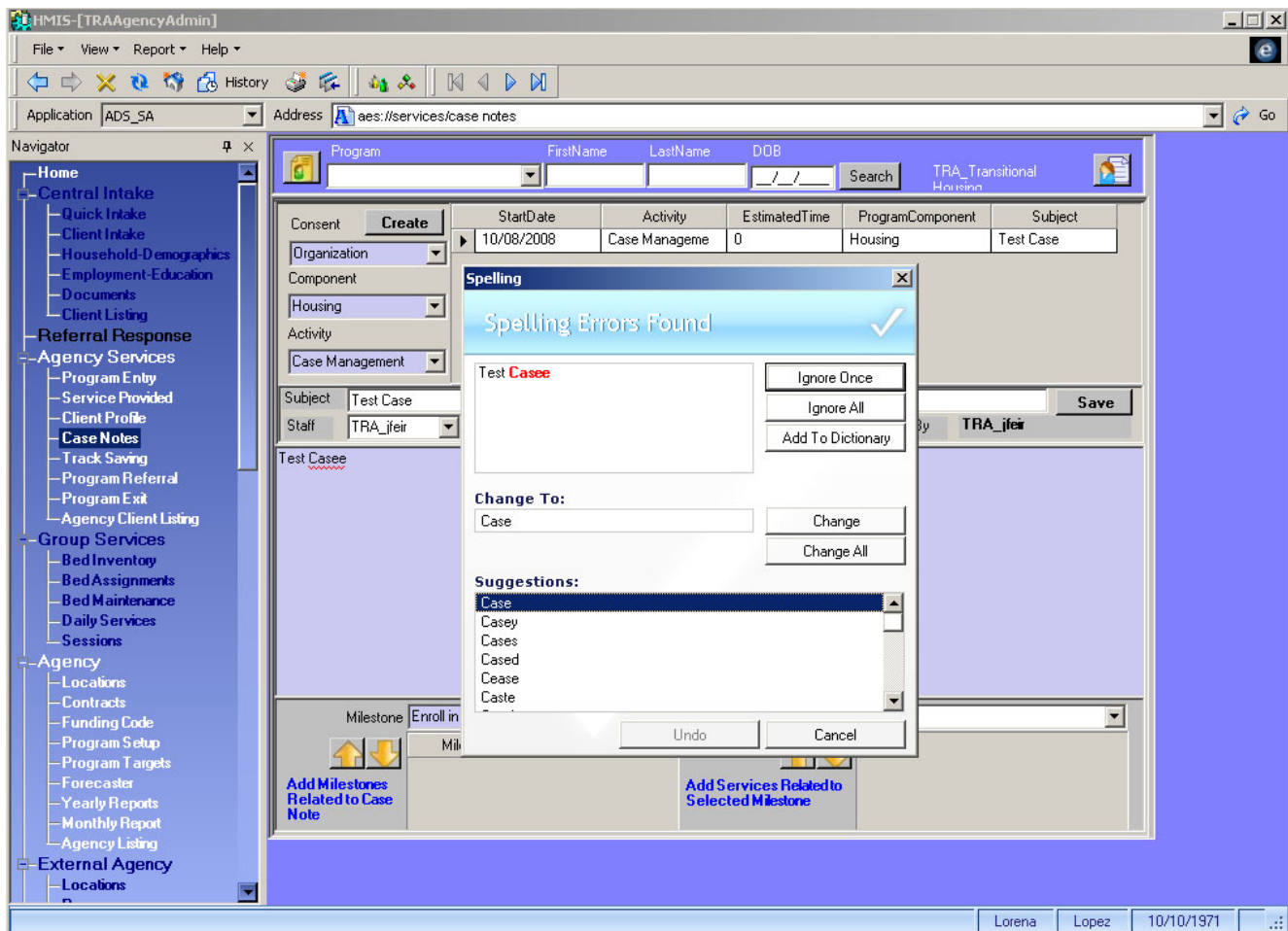
*After clicking on **Save**, you will notice that your entry line in the **Note History** container is now completed.



The screenshot shows the Case Notes interface. On the left is a Navigator pane with a tree view including Home, Central Intake, Referral Response, Agency Services, and Program Entry. The main area contains a form with fields for Program, FirstName, LastName, and DOB. Below these are dropdown menus for Organization, Component, Activity, and Consent. A 'Create' button is next to the Consent dropdown. A table below the form has columns: StartDate, Activity, EstimatedTime, ProgramComponent, and Subject. The table contains one row with values: 10/08/2008, Case Managemen, 0, Housing, and Test Case. A 'Save' button is visible at the bottom right of the form area.

Spell Check in the Case Notes Screen

A Spell Check box will automatically pop up if you misspell a word. It will do an auto run as you are typing and when you click out of the typing area, and if a word is misspelled, you will get a pop up box showing the errors found. After accepting changes, click on Save.

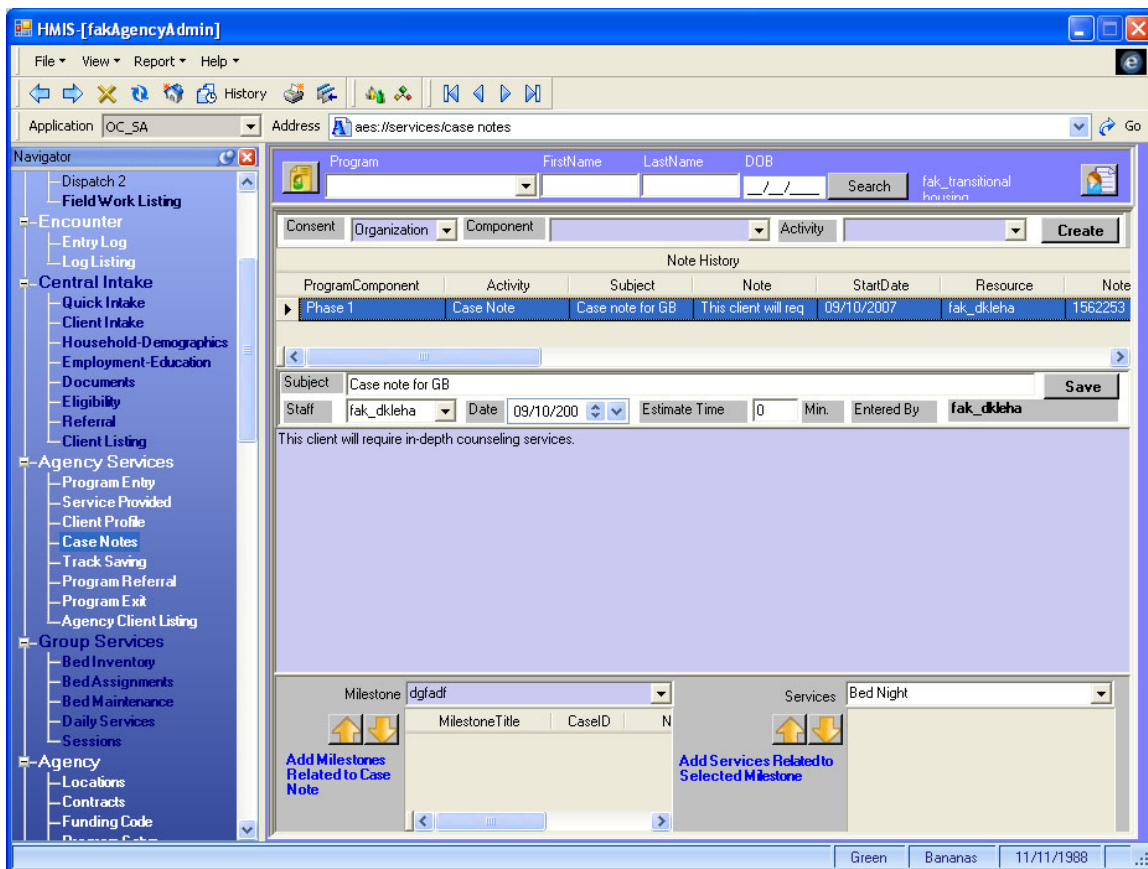


This screenshot shows the same Case Notes interface as above, but with a 'Spelling' dialog box open. The dialog box has a title bar 'Spelling' and a subtitle 'Spelling Errors Found'. It displays the word 'Test Case' with 'Case' highlighted in red. Below the word are buttons for 'Ignore Once', 'Ignore All', and 'Add To Dictionary'. There is a 'Change To:' section with a text box containing 'Case' and buttons for 'Change' and 'Change All'. A 'Suggestions:' list shows 'Case', 'Casey', 'Cases', 'Cased', 'Cease', and 'Caste'. At the bottom of the dialog are 'Undo' and 'Cancel' buttons. The background form shows the 'Test Case' text in the Subject field and a 'Save' button.

After you enter your case note, you can attach one or more milestones and services to that case note. This is explained starting on the next page.

Attaching Milestones to a Case Note

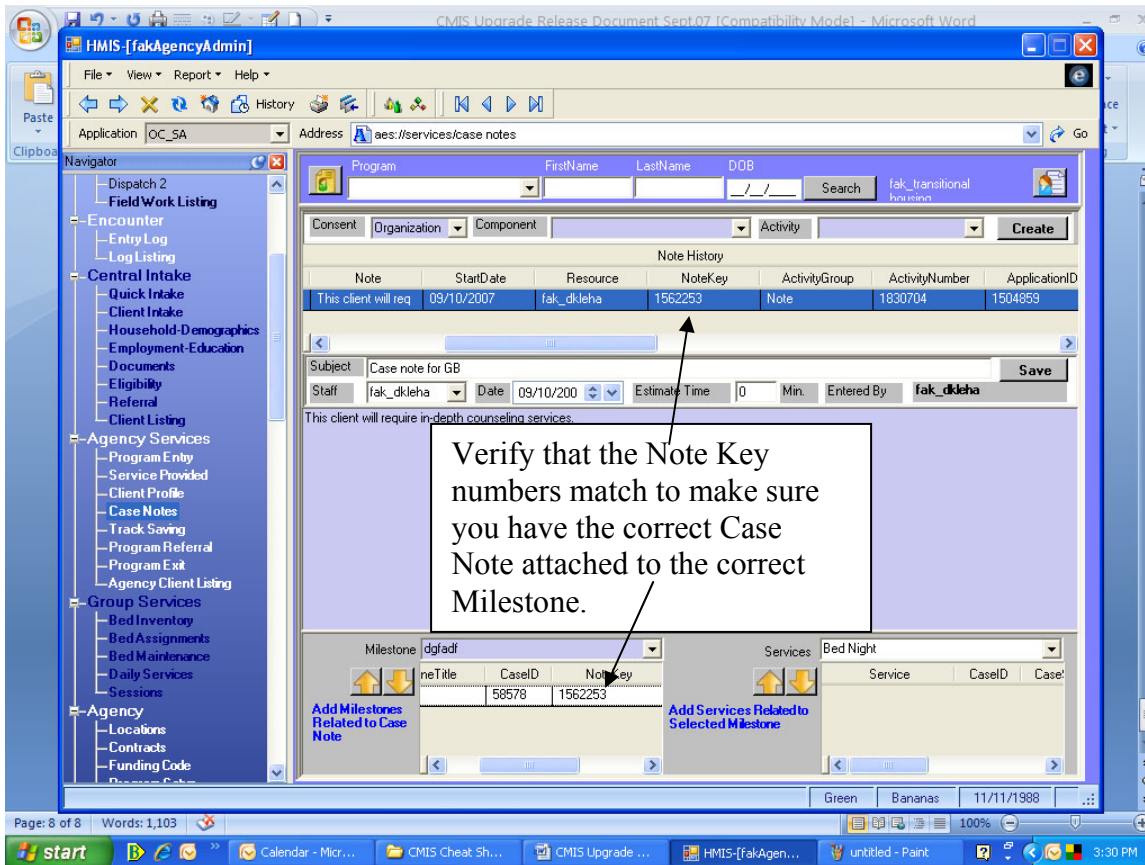
1. Highlight the case note that you wish to add a milestone to by clicking on the black arrow to the left on the case note entry. Make sure that the whole row is highlighted in blue.



2. Now click on the Milestone dropdown arrow. This will contain a list of your agency specific milestones. Highlight the milestone that you wish to attach.
3. Click on the yellow down arrow to attach. The milestone is now attached to the case note.

Attaching Milestones to a Case Note

When working with multiple case notes and milestones you can verify that you have the correct Case Note attached with the correct Milestone by matching up the Note Key numbers as shown below.



The screenshot shows the HMIS software interface. On the left is a navigation tree with categories like Encounter, Central Intake, Agency Services, Group Services, and Agency. The main window displays a Case Note form. At the top, there are search fields for Program, First Name, and Last Name. Below that is a 'Note History' table:

Note	StartDate	Resource	NoteKey	ActivityGroup	ActivityNumber	ApplicationID
This client will req	09/10/2007	fak_dkleha	1562253	Note	1830704	1504659

Below the table is a form for the selected case note. The 'Subject' field contains 'Case note for GB'. The 'Staff' field is 'fak_dkleha', 'Date' is '09/10/200', and 'Entered By' is 'fak_dkleha'. The text below the form reads: 'This client will require in-depth counseling services.'

At the bottom of the interface, there is a 'Milestone' table:

Milestone	CaseID	NoteKey
dgfadj	58678	1562253

A callout box with the text 'Verify that the Note Key numbers match to make sure you have the correct Case Note attached to the correct Milestone.' has two arrows pointing to the 'NoteKey' value '1562253' in both the Case Note table and the Milestone table.

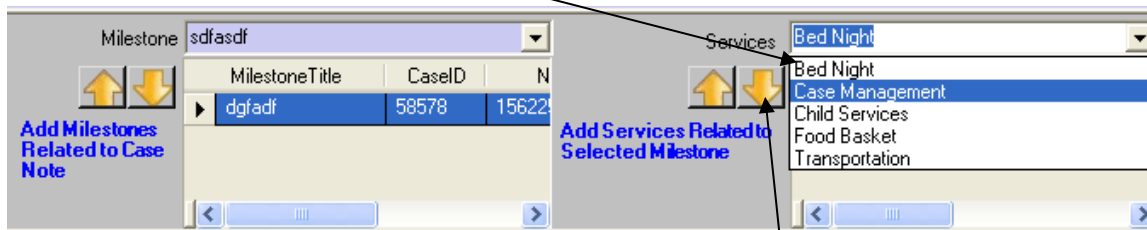
To attach another Milestone to the current Case Note, simply repeat steps 1 thru 3 again. Next, you can attach a Service to the Milestone.

Attaching a Service to a Case Note

1. Highlight the **Milestone** that you wish to add a Service to by clicking on the black arrow to the left of the Milestone.



2. Now choose the **Service** from the dropdown list.



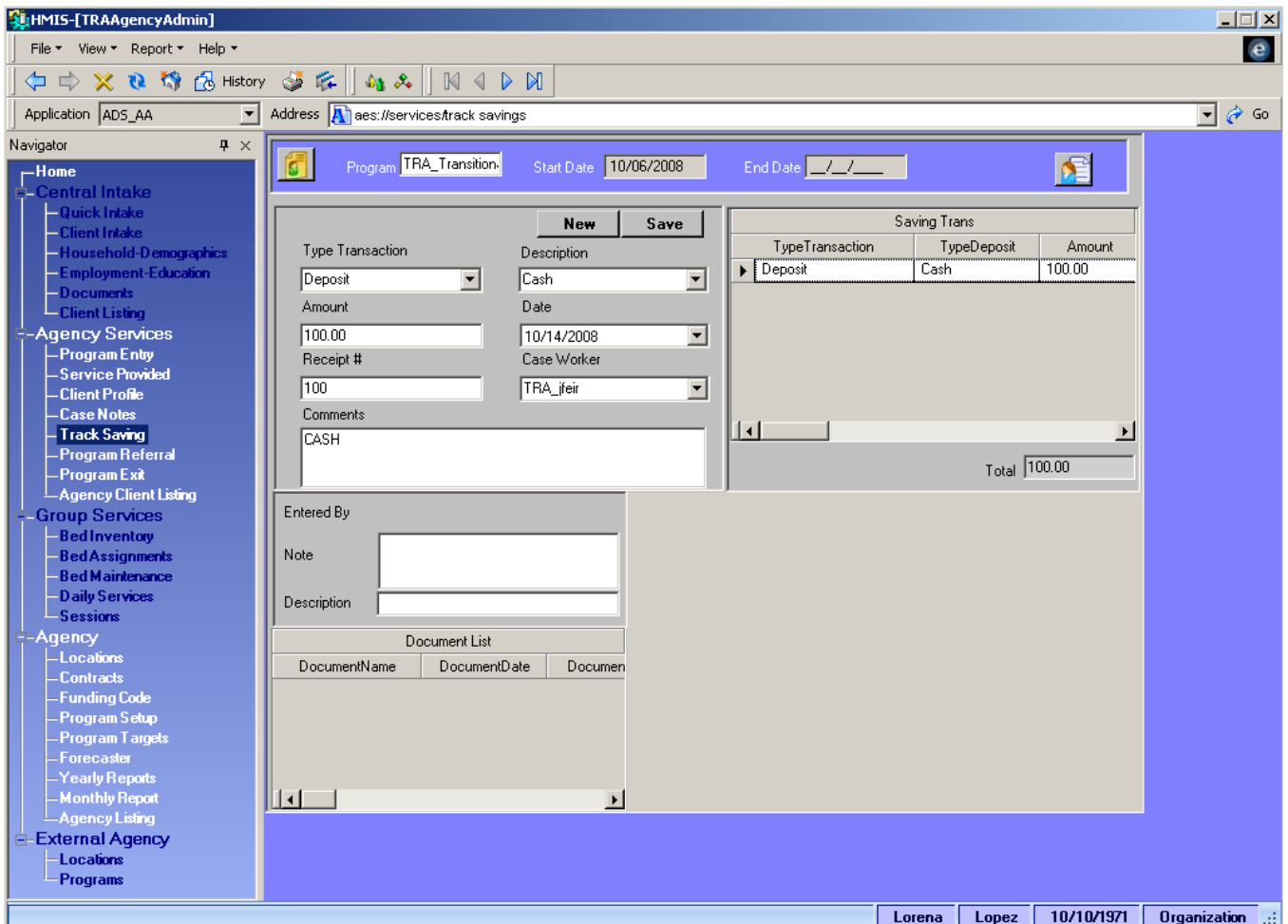
3. After choosing a Service, click on the yellow down arrow to attach the Service to the selected Milestone.
4. Click **Save**.

*You may also remove a Milestone or a Service by clicking on the yellow up arrow. Be sure to highlight the entry that you want to remove by clicking on the little black arrow to highlight the entire row.

Track Savings

This screen is generally used **only** if your agency physically collects and holds the client's money.

1. Click on **New**. Select the **Type Transaction** and **Description** using the dropdown lists.
2. Complete the remaining fields and click on **Save**.
3. To add a scanned document (such as a deposit receipt) or other document, right-click anywhere on the screen and select **Add New File**.
4. In the pop-up window, select the file and click on **Open**.
 - Choose **Consent** level (Organization) and enter a **Description** and **Note** if desired.
 - Click on **Save**.
5. If you uploaded a scanned document, it will appear on the page.



The screenshot shows the HMIS-TRA Agency Admin application window. The main content area displays the 'Track Savings' form with the following fields and values:

- Program:** TRA_Transition
- Start Date:** 10/06/2008
- End Date:** / /
- Type Transaction:** Deposit
- Description:** Cash
- Amount:** 100.00
- Date:** 10/14/2008
- Receipt #:** 100
- Case Worker:** TRA_jfeir
- Comments:** CASH

The 'Saving Trans' table shows the following data:

TypeTransaction	TypeDeposit	Amount
Deposit	Cash	100.00
		Total 100.00

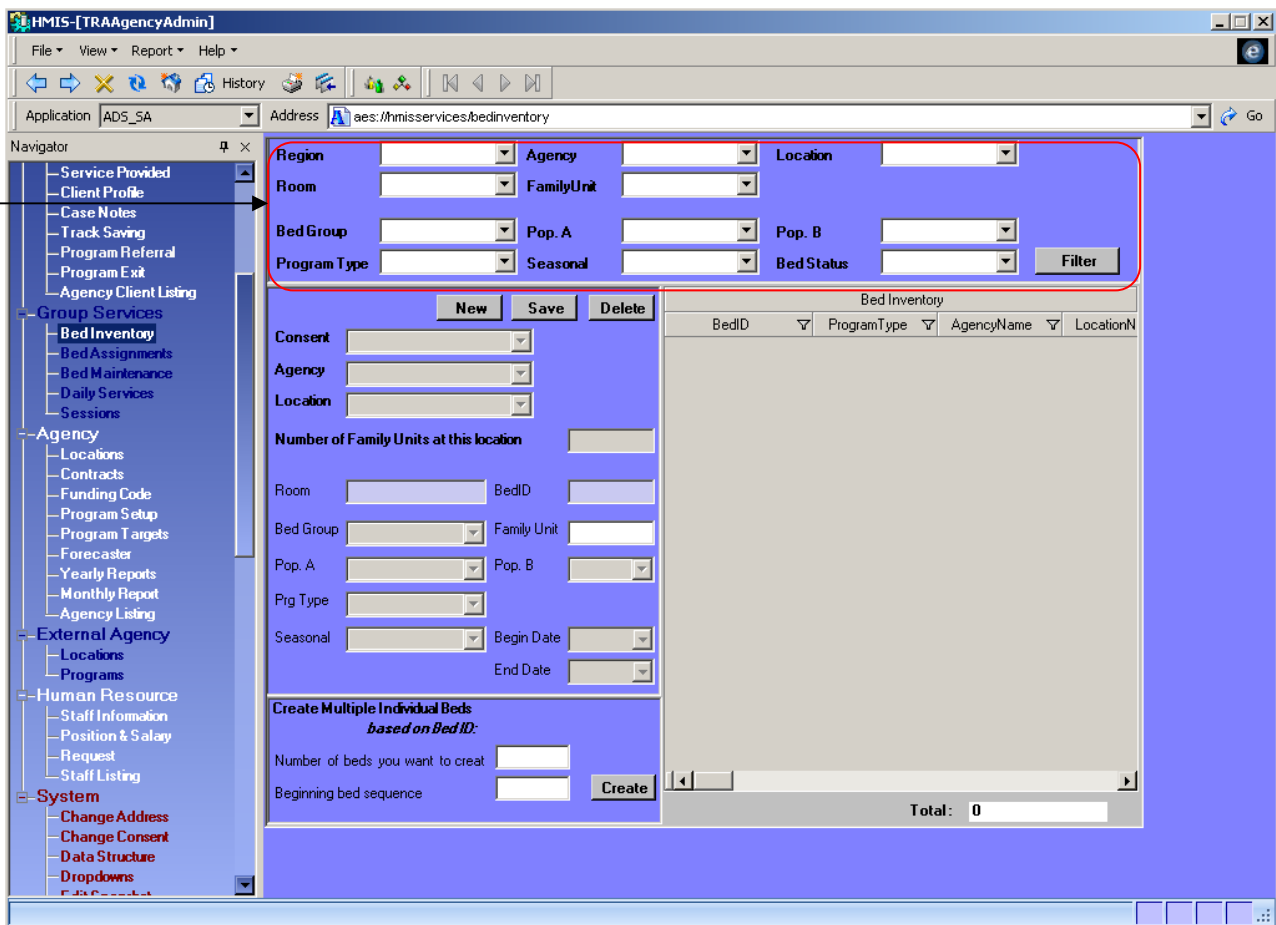
The 'Entered By' field is populated with 'Lorena Lopez' and the 'Date' is '10/10/1971'. The 'Organization' dropdown is set to 'Organization'.

Bed Inventory Screen

The Bed Inventory screen allows you to easily create and maintain beds. You can also add beds to locations and check to see if they are "in use" or "vacant."

Viewing Bed Availability

The top container of the screen gives you many choices on ways that you can search and view bed availability.



The screenshot shows the HMIS-TRAAgencyAdmin interface. The top navigation bar includes File, View, Report, and Help menus. The address bar shows the application path: aes:/hmisservices/bedinventory. A left-hand navigator lists various system functions, with 'Bed Inventory' highlighted under 'Group Services'. The main content area is divided into several sections:

- Search Filters:** A set of dropdown menus for Region, Agency, Location, Room, Family Unit, Bed Group, Pop. A, Pop. B, Program Type, Seasonal, and Bed Status, accompanied by a Filter button.
- Form Fields:** Fields for Consent, Agency, Location, Number of Family Units at this location, Room, BedID, Bed Group, Family Unit, Pop. A, Pop. B, Prg Type, Seasonal, Begin Date, and End Date.
- Create Multiple Individual Beds:** A section titled "based on Bed ID:" with input fields for "Number of beds you want to create" and "Beginning bed sequence", and a Create button.
- Table:** A table titled "Bed Inventory" with columns for BedID, ProgramType, AgencyName, and LocationN.
- Summary:** A "Total: 0" indicator at the bottom right of the table area.

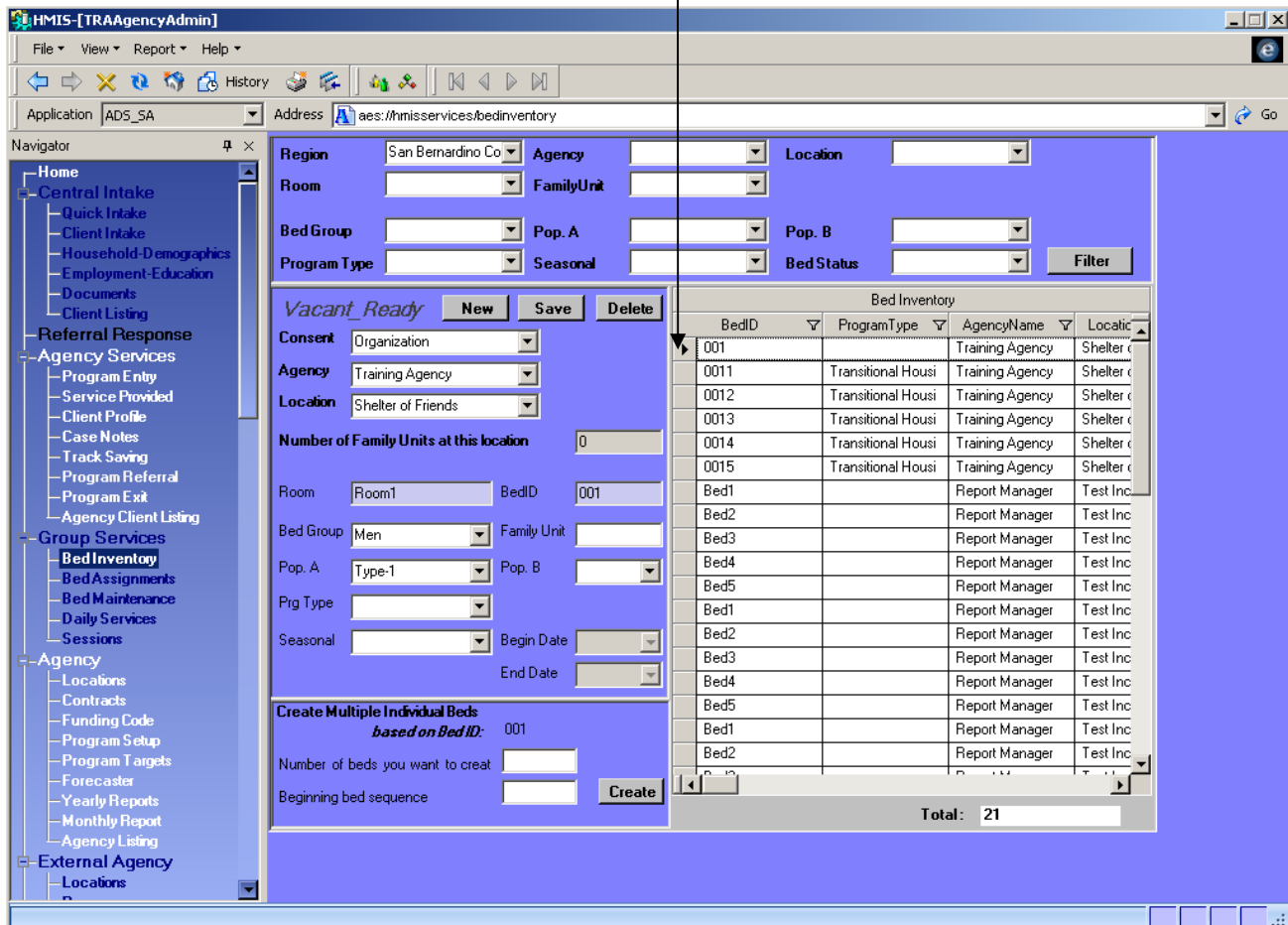
Searching for Beds

1. Click on the **Region** dropdown list and select San Bernardino County.



2. Click on the **Filter** button.

You should now see a list of all beds in your organization.



BedID	ProgramType	AgencyName	Location
001	Training Agency	Shelter of Friends	
0011	Transitional Housi	Training Agency	Shelter of Friends
0012	Transitional Housi	Training Agency	Shelter of Friends
0013	Transitional Housi	Training Agency	Shelter of Friends
0014	Transitional Housi	Training Agency	Shelter of Friends
0015	Transitional Housi	Training Agency	Shelter of Friends
Bed1		Report Manager	Test Inc
Bed2		Report Manager	Test Inc
Bed3		Report Manager	Test Inc
Bed4		Report Manager	Test Inc
Bed5		Report Manager	Test Inc
Bed1		Report Manager	Test Inc
Bed2		Report Manager	Test Inc
Bed3		Report Manager	Test Inc
Bed4		Report Manager	Test Inc
Bed5		Report Manager	Test Inc
Bed1		Report Manager	Test Inc
Bed2		Report Manager	Test Inc

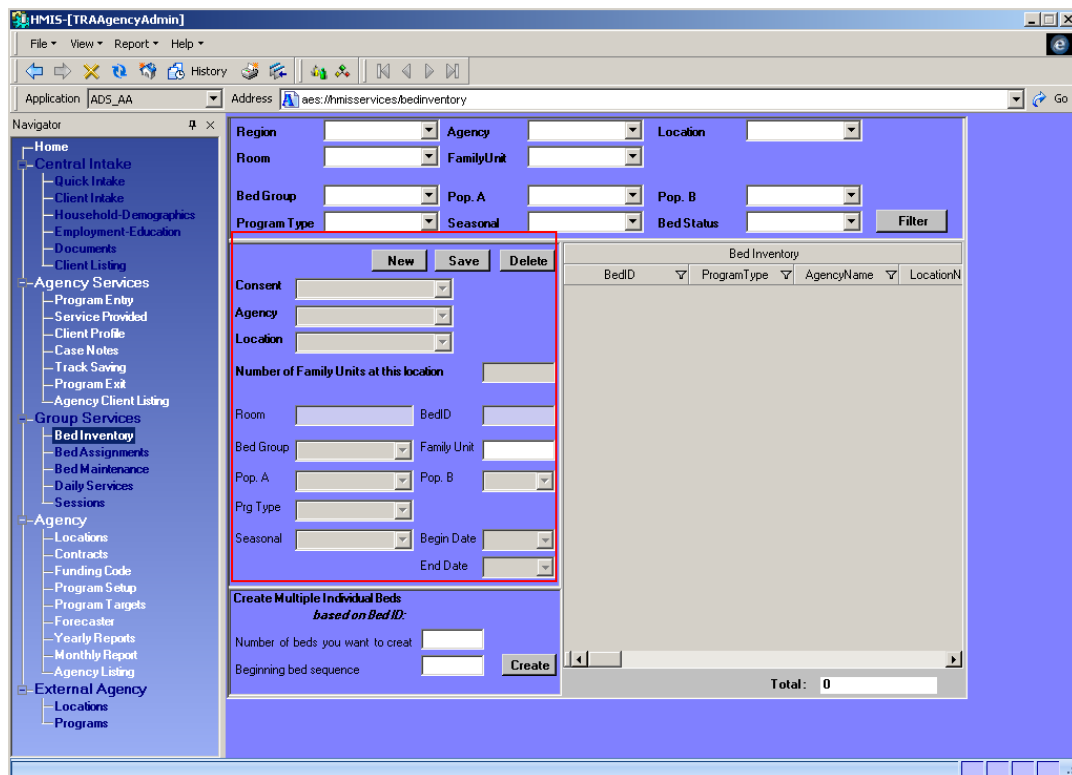
Total: 21

Searching for Beds (continued)

You can also narrow your search even further by choosing Agency, Location, Room, Family Unit, Bed Group, Pop.A, Pop.B, Program Type, Seasonal and Bed Status. Pop A. refers to the population such as single males, single females, etc. Pop. B refers to the 3 groups of: Domestic Violence, HIV or VETERAN. You may also choose to leave all categories blank, click the **Filter** button and it will give you a list of all of the beds in your organization.

Adding a Bed

To add a bed to your organization:

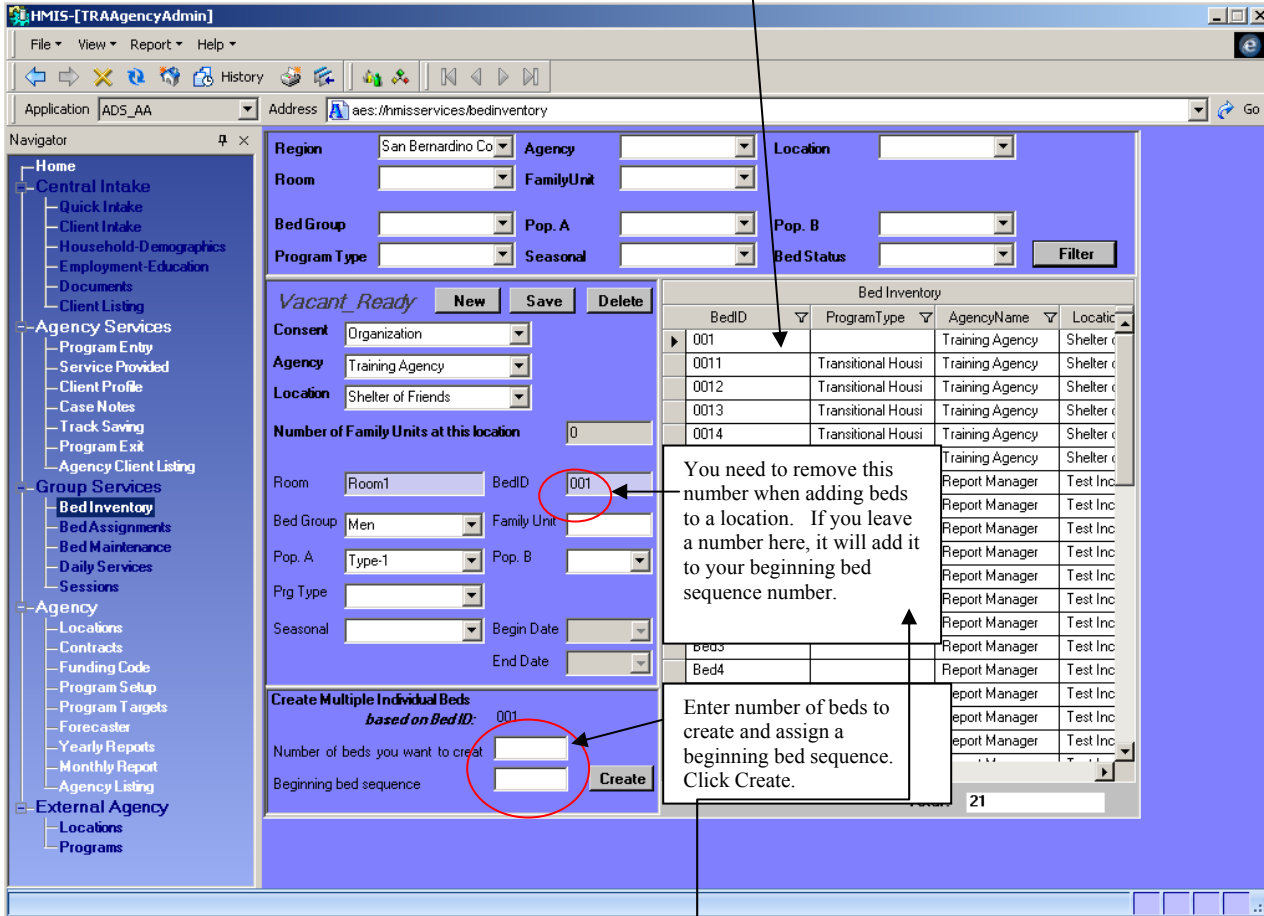


1. Click on **New**.
2. Select the **Consent** Level; always choose "**Organization**" unless you want other agencies viewing your beds.
3. Select **Agency**.
4. Select **Location**.
5. Enter **Room** name.
6. Enter **Bed ID**.
7. Enter or Select **Bed Group**
8. Enter or Select **Target Population A.** and/or **B** (not required)
9. Enter or select **Program Type** (not required)
10. Enter or select **Seasonal** (not required)
11. Click **Save**.

Adding More Beds to the Same Room

Once the initial bed is created and saved, it is easy to add more beds to the same room.

1. Select the bed in the Bed Inventory grid that you want to add beds to. Do this by highlighting the row of the location in this container.



Callout 1: You need to remove this number when adding beds to a location. If you leave a number here, it will add it to your beginning bed sequence number.

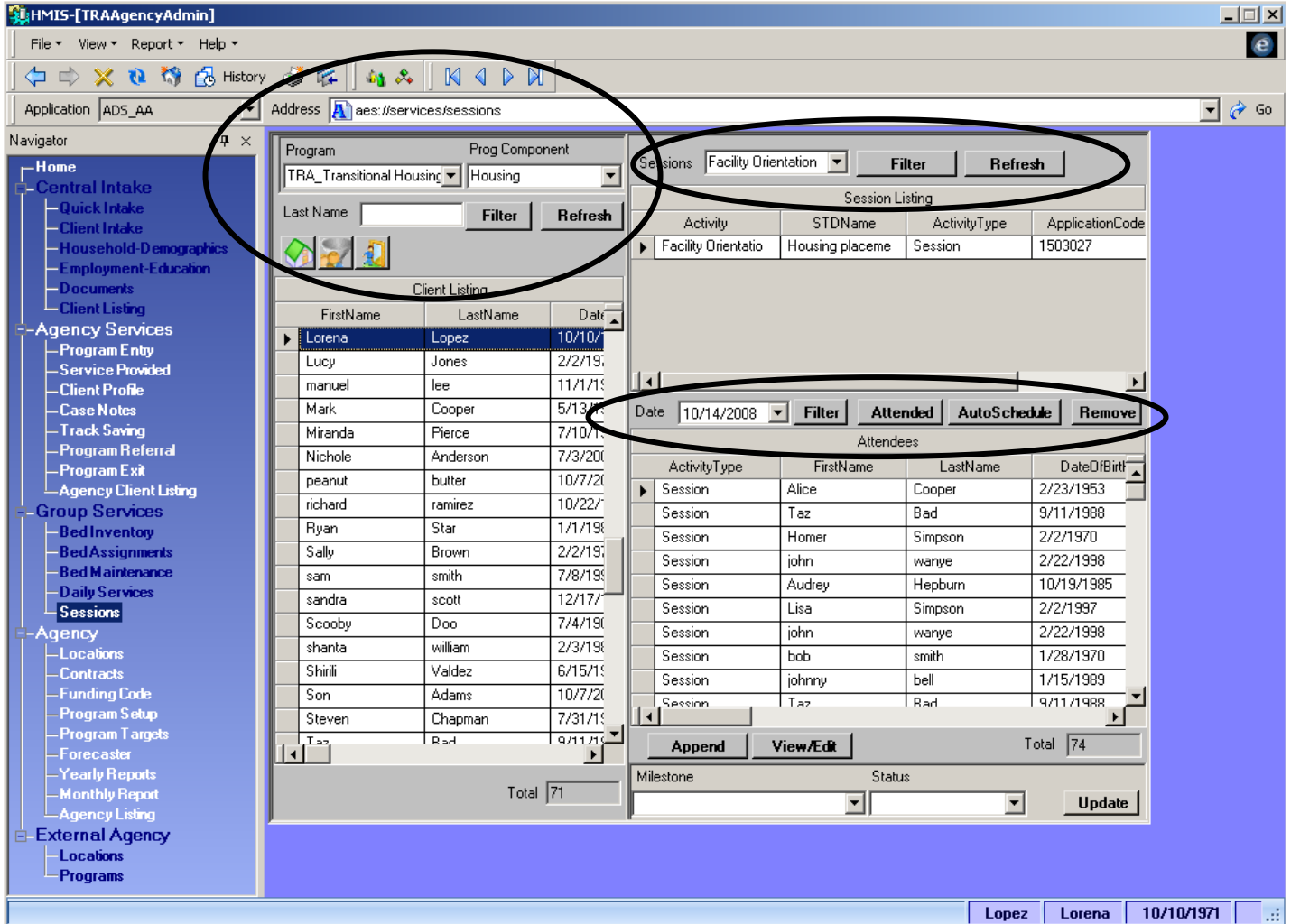
Callout 2: Enter number of beds to create and assign a beginning bed sequence. Click Create.

2. Enter the **Number of Beds You Want to Create**.
3. Enter the **Beginning Bed Sequence**. Only numbers are allowed. If your first bed was named Bed 1, enter a 2 here.
4. Delete the number showing in the **Bed ID** field.
5. Click the **Create** button.

You should now see your beds added in the **Bed Inventory** Grid.

Bed Inventory				
BedID	ProgramType	AgencyName	Locatic	
1	Transitional Housi	Training Agency	Shelter c	
2	Transitional Housi	Training Agency	Shelter c	
3	Transitional Housi	Training Agency	Shelter c	
4	Transitional Housi	Training Agency	Shelter c	
5	Transitional Housi	Training Agency	Shelter c	

Sessions



The screenshot shows the HMIS-TRAAgencyAdmin interface. The left navigation pane includes sections like Home, Central Intake, Agency Services, Agency, and External Agency. The main area is titled "Sessions" and contains the following elements:

- Search Filters:** Program (TRA_Transitional Housing), Prog Component (Housing), Last Name (empty), Filter, Refresh.
- Session Listing Table:**

Activity	STDName	ActivityType	ApplicationCode
Facility Orientatio	Housing placeme	Session	1503027
- Attendees Table:**

ActivityType	FirstName	LastName	DateOfBirth
Session	Alice	Cooper	2/23/1953
Session	Taz	Bad	9/11/1988
Session	Homer	Simpson	2/2/1970
Session	john	wanye	2/22/1998
Session	Audrey	Hepburn	10/19/1985
Session	Lisa	Simpson	2/2/1997
Session	john	wanye	2/22/1998
Session	bob	smith	1/28/1970
Session	johnny	bell	1/15/1989
Session	Taz	Bad	9/11/1988
- Client Listing Table:**

FirstName	LastName	Date
Lorena	Lopez	10/10/1971
Lucy	Jones	2/2/1991
manuel	lee	11/1/1981
Mark	Cooper	5/13/1981
Miranda	Pierce	7/10/1981
Nichole	Anderson	7/3/2001
peanut	butter	10/7/2001
richard	ramirez	10/22/1981
Ryan	Star	1/1/1981
Sally	Brown	2/2/1991
sam	smith	7/8/1981
sandra	scott	12/17/1981
Scooby	Doo	7/4/1981
shanta	william	2/3/1981
Shirili	Valdez	6/15/1981
Son	Adams	10/7/2001
Steven	Chapman	7/31/1981
Taz	Bad	9/11/1981
- Summary:** Total 71 clients, 74 attendees.

1. Search for your client by choosing the Program and Program Component they are enrolled in or by typing in their last name and clicking filter. Choose your client.
2. Choose the Session by selecting the row under Session Listing.
3. Enter the Date and click Attended.

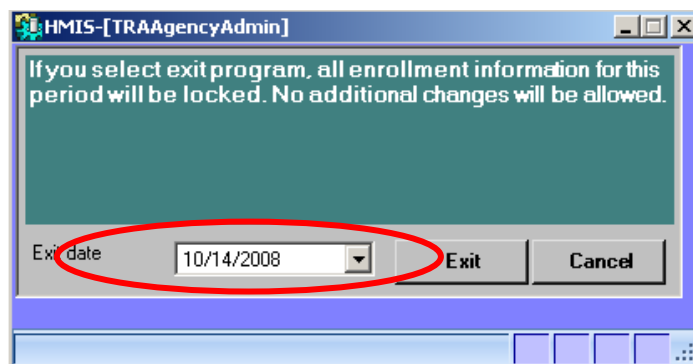
Exiting a Client

1. Pull up the client on **Agency Client Listing** and go to the **Service Provided** screen.
2. **Service Provided:**
 - Enter a **Status** and **Status Date** for every milestone. **Note:** The status date must be before the exit date.
 - Make sure that all **activities** have been entered for each milestone.
3. **Client Profile.** If your agency has a pre, post-test or other special questions, they will be on this screen. Be sure the answers have been entered.
4. **Case Notes:** Make sure all case notes from everyone in your agency have been entered.
5. **Track Saving:** Make sure all information is up-to-date.
6. **Print Reports:** Print all client-specific reports. **These reports can still be printed after you exit your client.**
 - Client Program Entry Form Report
 - Client's Case Notes Report
 - Client's Milestone Summary Report
 - Client's Service Received Report

Program Exit

1. Click on **Begin Exit Process**. This will generate the exit questions.
2. If known, enter the "Destination Address" (address where client is going to live when they leave the program) and click on **Save**. If you only know the city, state, and/or zip, enter that information.
3. **Income at Entry/Exit:** Income at Entry is pulled over from the **Program Entry** screen (which originally pulled the information over from **Household Demographics** when you enrolled the client). The most important thing to remember is that "Snapshot 1" is Income at Entry, and the last snapshot entered will be the Income at Exit.
 - Click on the **Income Snapshot** button.
 - In the popup window, check the snapshot number at the bottom left next to the **Previous** button (circled below). This is the **most recent** income snapshot and will be shown as the client's income at exit.

- **If the snapshot in the popup window is Snapshot 1:**
 - ✓ This amount will show up as both the **Income at Entry** and **Income at Exit**. If snapshot 1 does not show the correct Income at Entry, select the record in the Income section on the right, make changes, then click on **Save** and **Close**.
 - ✓ To add a different amount for Income at Exit, you must create a second snapshot. In the snapshot popup window, click on **Snapshot**, then click on **Next**. In the Income section, click on **New**, enter the information, then click on **Save** and **Close**.
 - **If the snapshot in the popup window is NOT Snapshot 1:**
 - ✓ This amount will show up as **Income at Exit**. If this is not the correct income at exit, select the record(s) on the right, make changes, then click on **Save** and **Close**. Or, to create a new income snapshot, click on **Snapshot**, then click on **Next**. In the Income section, click on **New**, enter the information, then click on **Save** and **Close**.
 - ✓ To make changes to Income at Entry, click on **Previous** until Snapshot 1 appears, then edit the record as described above.
 - The Program Exit screen should now show the correct income at entry and exit.
4. To shrink the question list to show only the required questions, click on the **Required** button at the bottom of the question grid. Answer the **Exit Questions** using the dropdown fields on the right and click on **Finish**.
 5. Click on the **Exit** button at the top of screen. You will get a warning that all enrollment information for this client will be locked. (You will still be able to view the information and print reports, but you won't be able to make any changes).
- **Be sure to enter the date your client actually exited the program in the Exit Date field.**





- If you're sure you want to exit the client, click on **Exit**.




NOTE: If you accidentally exit a client who shouldn't have been exited, notify a Systems Administrator at Community Action Partnership of San Bernardino County (909) 723-1522 or 723-1523. Or you may also email our HMIS helpdesk at jfeir@capsbc.sbcounty.gov.

X. Checklist

NOTE:

- Before enrolling a client in a program, you must complete **Client Intake or Quick Intake** and **Household Demographics** in the **Central Intake Library**. (See the cheat sheet, "How to Enter a Client in HMIS.")
- The only **required screens** for this section (**Agency Services Library**) are **Program Entry** and **Service Provided**.
- All blue fields on each of these screens are required fields.



Step	Screen	Description
1	Client Listing	<ul style="list-style-type: none"> • Search for the client. • Select the client's record and click on the Jump to Program Entry  shortcut button.
2	Client Intake	<ul style="list-style-type: none"> • Complete all required (blue) fields and click on Save. <ul style="list-style-type: none"> ✓ Note: DO NOT CHANGE Consent or Consent Expiration Date. (Possible exception: domestic abuse clients.) ✓ Enter the client's full legal name. To enter an alias or nickname, see Step 3, Household Demographics.
3	Quick Intake	<ul style="list-style-type: none"> • Click on "New HH" to enter the Head of Household • Click on "New" to enter each family member • Go to the Program Entry screen to back date the Program Enrollment Date • Do not make up a social security number or enter all zeros
	Household Demographics: Head of Household	<ul style="list-style-type: none"> • Make sure the correct person's name appears at the bottom of the screen and complete ALL the remaining blue fields. NOTE: <ul style="list-style-type: none"> ✓ To enter an Alias (nickname or other name used): Click on the double arrow button  next to the Last Name field. ✓ Relation: Relationship to Head of Household. ✓ Race: Must select one or more. ✓ Housing: Client's living situation immediately prior to entering the program. ✓ Family Type: Refers only to household members entering the program. • Click on Save.
	Household Demographics: Income at Entry into program	<p>NOTE: The Income section must be completed for every Head of Household, even if the client has no income.</p> <ul style="list-style-type: none"> ✓ Be sure the correct person is selected in the Household Members grid and click on New. ✓ Income Source: If client has no income, select No financial resources.

		<ul style="list-style-type: none"> ✓ Enter a Stated Income and select a Pay Interval, even if the income is 0. ✓ If no documentation is available, select Self Declaration. • Click on Save (just above client's age). • Click on Non-Cash Benefit, check the appropriate boxes, click on Save, and click on Close. • If there are no other household members, click on the Jump to Program Entry shortcut and see the cheat sheet, How to Enroll a Client in a Program. 
	<p>Household Demographics:</p> <p>Household Members</p>	<ul style="list-style-type: none"> • To add household members, click on New (above Consent) and enter household member's information, including Race. Housing and Family Information are automatically filled in from the Head of Household's information. • To save, click on Same Family or New Family. • If the household member has income or non-cash benefits, select that person in the Household Members grid and add income and/or non-cash benefits (see Step 4). • Repeat this process until all household members have been added. • If you are not using the optional screens and are ready to enroll the client, click on the Jump to Program Entry shortcut button  and see the cheat sheet, How to Enroll a Client in a Program.
	<p>Program Entry:</p> <p><i>Enrollment Information</i></p>	<ul style="list-style-type: none"> • Make sure the correct client is at the bottom of the screen. • Select the Program from the dropdown list and click on Enter Program. • Change the Program Entry Date to the date the client was enrolled in the program. • Click on Save.
	<p>Program Entry:</p> <p><i>Household Income and Prior Living Situation</i></p>	<ul style="list-style-type: none"> • Verify that the income shown is the correct "income at entry." To make changes: <ul style="list-style-type: none"> ✓ Click on the Income Snapshot  button. ✓ Select the record in the Income grid on the right. ✓ Change the Income Source, Income Value, Pay Interval, and Documentation. ✓ Click on Save and Close. • Select Prior Living Situation (immediately before entering program) and Length of Stay in Previous Place.
	<p>Service Provided</p> <p><i>Generate</i></p>	<ul style="list-style-type: none"> • Make sure the correct client's name is at the bottom of the screen. If not, search for the client in the Agency Client Listing screen, select

	Milestones	<p>their record, and return to the Service Provided screen.</p> <ul style="list-style-type: none"> • Select Consent (Organization), Prog Component, and Staff and click on Generate.
	Service Provided Milestone Status	<ul style="list-style-type: none"> • NOTE: Every milestone must have a status and status date before exiting a client. When first enrolling a client, you may only have a status and status date for the first milestone. • Click on the first milestone and select a Status: <ul style="list-style-type: none"> ✓ Complete ✓ In Progress ✓ Unsuccessful (attempted but not completed) ✓ N/A (milestone did not apply or client left program before attempting milestone). • Select a Status Date (can be any date between enrollment and exit). • Click on Save (next to the Status field). • Do not click on the "Refresh Milestones" button until further notice.
	Service Provided Activities	<ul style="list-style-type: none"> • Select the first milestone with a status. If you/your agency provided any activities (services) that helped the client achieve that milestone: <ul style="list-style-type: none"> ✓ Click on New in the Activity section ✓ Select the Activity from the dropdown list (do not type in a new activity) ✓ Select the Staff, Date the service was provided, and Description. ✓ Click on Save (above the Activity/units). ✓ To select another activity for that milestone, click on New and enter the information. • Select the next milestone and add any activities for that milestone. Continue until all activities have been added for all milestones with a status.
	Agency Client Listing	<p>Use this screen to search for clients who have been enrolled in your program (Program Entry screen).</p> <ul style="list-style-type: none"> • You must use at least one search field. Entering less information will usually get better results. <ul style="list-style-type: none"> ✓ To find a client who is currently enrolled, select Yes in the Active field. <p>To find a client who has been exited from your program, select No in the Active field.</p>

Additional Screens Checklist

1	Client Profile	<ul style="list-style-type: none"> • Make sure the correct client's name is at the bottom of the screen. • Select Consent (Organization) and Activity (questionnaire name) and click on Filter. • Complete the remaining blue fields. • Answer the questions using the dropdown fields and click on Next after each answer. • After answering the last question, click on Finish to save.
2	Case Notes	<ul style="list-style-type: none"> • Make sure the correct client's name is at the bottom of the screen. • Select Consent (Organization) and click on New. • Select the Prog Component, Milestone, Activity (Case Note), Staff and Date from the dropdown lists. • Enter the Min. (minutes, how long it will take to type up the case note) and Subject of the case note. • Type the case note in the blue area click on Save.
3	Track Saving	<p>NOTE: This screen is to be used only if you physically collect and hold a client's money.</p> <ul style="list-style-type: none"> • Click on New. • Select the Type Transaction and Description from the dropdown lists. • Complete the remaining fields and click on Save. • To add a scanned document (such as a deposit receipt) or other document: <ul style="list-style-type: none"> ✓ Right-click anywhere on the screen and select Add New File. ✓ In the pop-up window, select the file and click on Open. ✓ Select Consent (Organization). ✓ Enter a Description and Note if desired. ✓ Click on Save.
4	Bed Inventory	<p>This screen is used to view your region's bed inventory as well as add and delete beds.</p> <ul style="list-style-type: none"> • Be sure to remove whatever number is in the Bed ID field before adding new beds. If you don't, it will add that number to your beginning bed sequence number.

5	Employment-Education	<ul style="list-style-type: none"> • Make sure the correct client's name is at the bottom of the screen. • No fields are required except "Date From" in the Employment section. Pay information entered here does not affect income records anywhere else in HMIS. • Click on Save before clicking on New to add another record. • If you are ready to enroll the client, click on the Jump to Program Entry shortcut button  and see the cheat sheet, <u>How to Enroll a Client in a Program.</u>
6	Documents	<ul style="list-style-type: none"> • Make sure the correct client's name is at the bottom of the screen. • Right-click anywhere on the screen and select Add New File. • In the pop-up window, select the file name and click on Open. • Choose Consent level (usually System) and enter a Description and Note (optional). • Click on Save. If you uploaded a scanned document (photo or ID card), it will appear on the page. • If you are ready to enroll the client, click on the Jump to Program Entry shortcut button  and see the cheat sheet, <u>How to Enroll a Client in a Program.</u>

XI. How to determine Race and Ethnicity

Ethnicity

Hispanic: The definitions Hispanic according to HUD is a person of Cuban, Mexican, Puerto Rican, South or Central American or other Spanish culture of origin, regardless of race.

Non-Hispanic: everyone that is not Hispanic

Race

White: is a person having origins in any of the original peoples of Europe the Middle East or North Africa.

Asian: is a person having origins in any of the original people of the Far East, Southeast Asia or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippines Islands, Thailand and Vietnam.

Black/African-American: is a person having origins in any of the black racial groups of Africa.

Native Hawaiian/ Pacific Islander: is a person having origins in any of the original peoples of Hawaii, Guam, Samoa or other Pacific Islands.

US Indian/Alaska Native: is a person having origins in any of the original peoples of North and South America, including Central America, and who maintains tribal affiliation or community attachment.

XII. Glossary of Terms

Agency Administrator: The person responsible for System administration at the agency level. Responsibilities include informing HMIS System Administration of the need to add and delete users, basic trouble-shooting.

Aggregate Data: Data with identifying elements removed and concentrated at a central server. Aggregate data are used for analytical purposes and reporting.

Anti-Virus Software: Programs to detect and remove computer viruses. The anti-virus software should always include a regular update services allowing it to keep up with the latest viruses as they are released.

Authentication: The process of identifying a user in order to grant access to a system or resource. Usually based on a username and password.

Cable: A type of modem that allows people to access the Internet via their cable television service.

Central Intake level data: Client information collected at intake, including the following system screens: Client Intake, Household/Demographics, Referral, Eligibility, Education/Employment and Documents.

Client: The person receiving services whose information is entered into SBC CoC HMIS.

Continuum of Care (CoC): Continuum of Care; refers to the range of services (outreach, emergency transitional and permanent housing and supportive services) available to assist people out of homelessness.

Database: An electronic system for organizing data so it can easily be searched and retrieved.

The data within SBC CoC HMIS is accessible through the web-based interface.

Digital Subscriber Line (DSL): A digital telecommunications protocol designed to allow high-speed data communication over the existing copper telephone lines.

Firewall: A method of controlling access to a private network, to provide security of data. Firewalls can use software, hardware, or a combination of both to control access.

HMIS: Homeless Management Information System. This is a generic term for any System used to manage data about the use of homeless services.

HMIS System Administrator: The person(s) with the highest level of user access in SBC CoC HMIS. This user has full access to all user and administrative functions in the CoC and will serve as the liaison between Participating Agencies and the vendor.

HMIS End-User: A person who has unique user identification (ID) and directly accesses SBC CoC HMIS to assist in data collection, reporting or administration as part of their job function in homeless service delivery. Users are classified as either system users who perform administration functions at the system or aggregate level or agency users who perform functions at the agency level.

Host: A computer system or organization that plays a central role providing data storage and/or application services for SBC CoC HMIS. (Adsystech Inc. is the HOST for the SBC CoC HMIS)



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HMIS
Homeless Management Information System

Internet: A set of interconnected networks that form the basis for the World Wide Web.

Internet Protocol Address (IP Address): A unique address assigned to a user's connection based on the TCP/IP network. The Internet address is usually expressed in dot notation, e.g.:
128.121.4.5.

Internet Service Provider (ISP): A company that provides individuals or organization with access to the internet.

Local Area Network (LAN): A network that is geographically limited, allowing easy interconnection of computers within offices or buildings.

SBC CoC HMIS: San Bernardino County Continuum of Care Homeless Management Information System is a web-based information system that homeless service agencies within the San Bernardino Region use to capture information about the persons they served.

Network: Several computers connected to each other.

On-site: The location that uses SBC CoC HMIS and provides services to at-risk and homeless clients.

Outcome/Program Manager: The person at each Participating Agency designated to develop and assess the use of outcome measures for the agency's data on SBC CoC HMIS.

Participating Agency: An agency, organization or group who has signed an **HMIS Agency Agreement** that allowed access to SBC CoC HMIS.

HMIS End-User Group: HMIS End-User Group is made up of HMIS end-users from agencies

throughout the CoC. The main purpose is to provide input on system issues, provide mutual support among users, share best practices and address challenges as a team. In addition, the User's Group will address effective ways to help advanced users to maximize system functionality and effective use of data.

Program Level Data: Client information collected during the course of the client's program enrollment, including the following system screens: Program Entry, Services Provided, Client Profile, Case Notes, Track Savings, Bed Assignments, Bed Maintenance, Daily Services, Sessions, and Program Exit.

Real-Time: Data that is processed and available to other users as it is entered into the system.

AESHMIS: Adaptive Enterprise Solution Homeless Management Information System is the software package provided by the vendor that has been implemented as SBC CoC HMIS software. (Adsystem Inc.)

Server: A computer that provides a service for other computers connected to it via a network. Servers can host and send files, data or programs to client computers.

T1 Line: Communication line that can carry voice or data at transmission speeds that are 25 times the speed of a modem.

Transmission Control Protocol/Internet Protocol (TCP/IP) –The protocol that enables two or more computers to establish a connection via the internet.

User ID: The unique identifier assigned to an authorized HMIS End-User.

Wide Area Network (WAN): A network that is not geographically limited, can link computers in

different locales, and extend requests for web pages.

Wired Equivalent Privacy (WEP): is a security protocol, specified in the IEEE Wireless Fidelity (Wi-Fi) Standard, 802.11b, which is designed to provide a wireless local area network (WLAN) with a level of security and privacy comparable to what is usually expected of a wired LAN. A wired local area network (LAN) is generally protected by physical security mechanisms (controlled access to a building, for example) that are effective for a controlled physical environment, but may be ineffective for WLANs because radio waves are not necessarily bound by the walls containing the network. WEP seeks to establish similar protection to that offered by the wired network's physical security measures by encrypting data transmitted over the WLAN. Data encryption protects the vulnerable wireless link between clients and access points; once this measure has been taken, other typical LAN security

mechanisms such as password protection, end-to-end encryption, virtual private networks (VPNs), and authentication can be put in place to ensure privacy.