Homeless Management Information System (HMIS)

Manual

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

Table of Contents

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:

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.

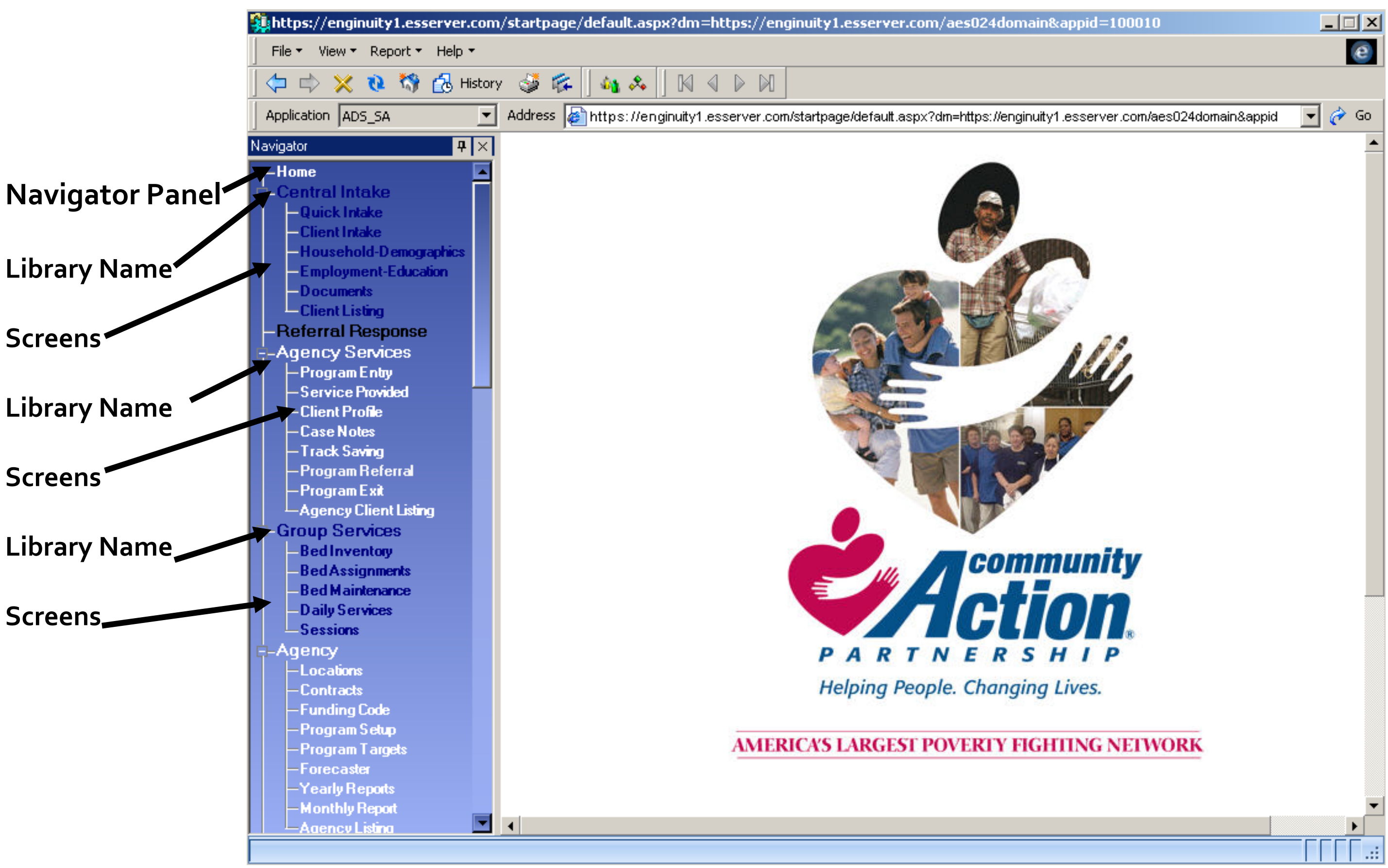
II. HMIS Software Terminology

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.



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.)

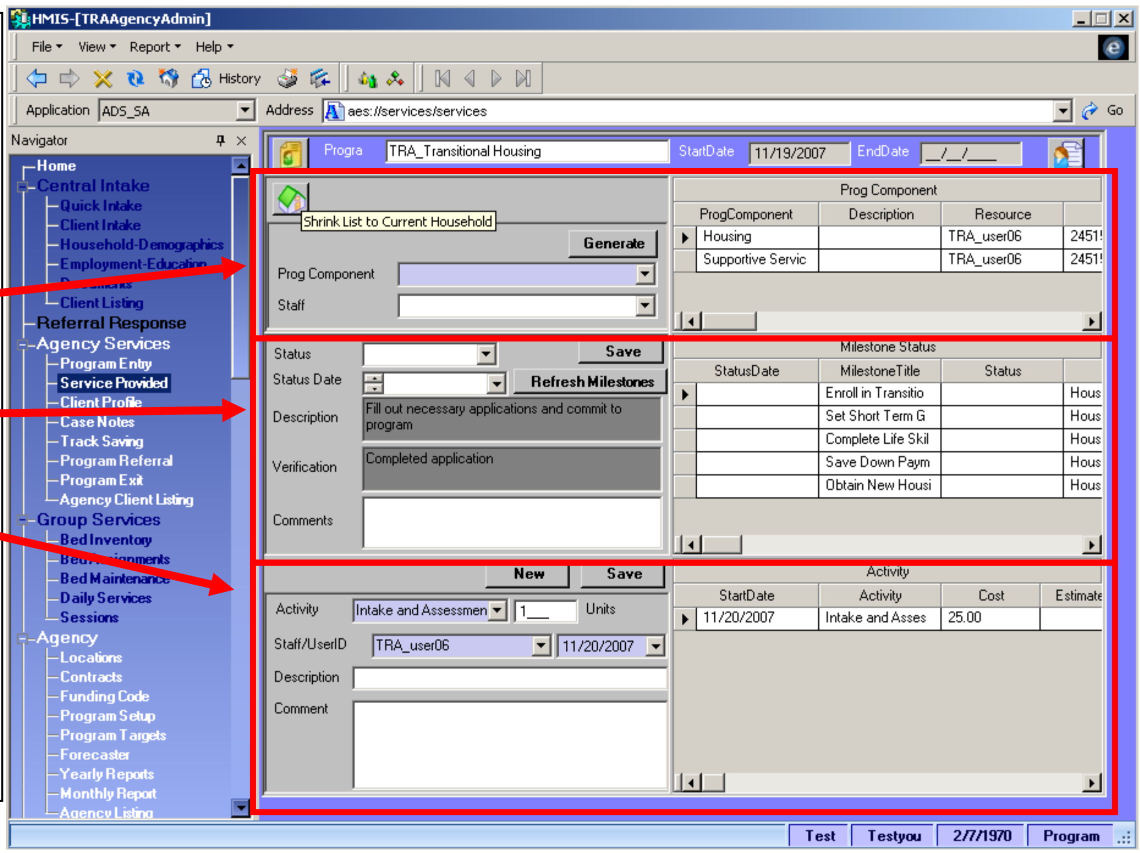
Container Examples

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

1) **Program Component** container

2) **Milestone Status** container

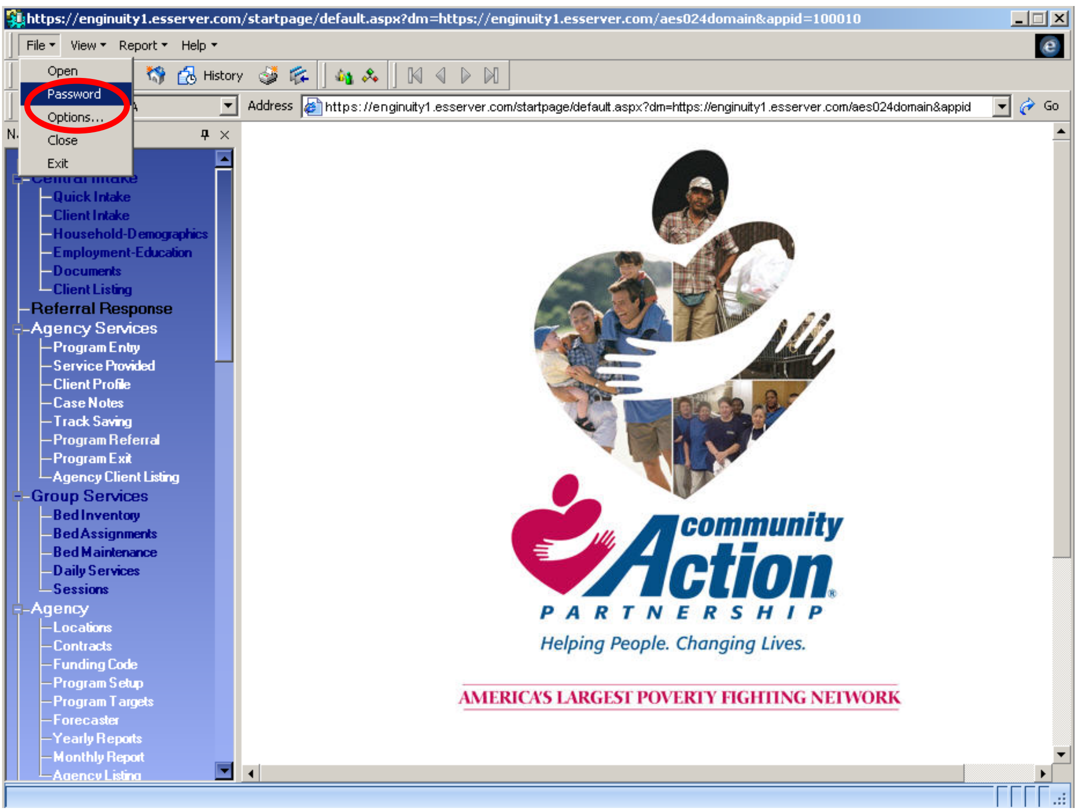
3) **Activity** container



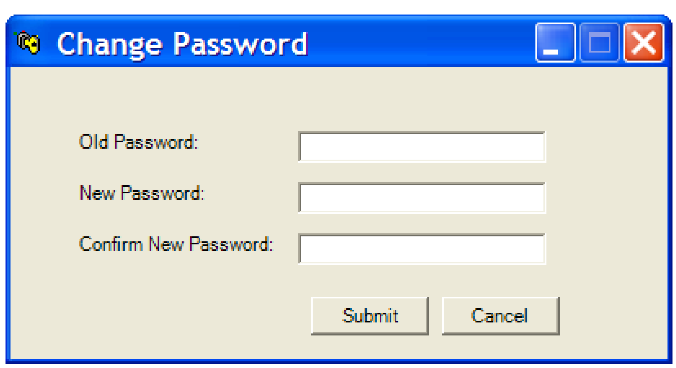
III. How to Change Your HMIS Password

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

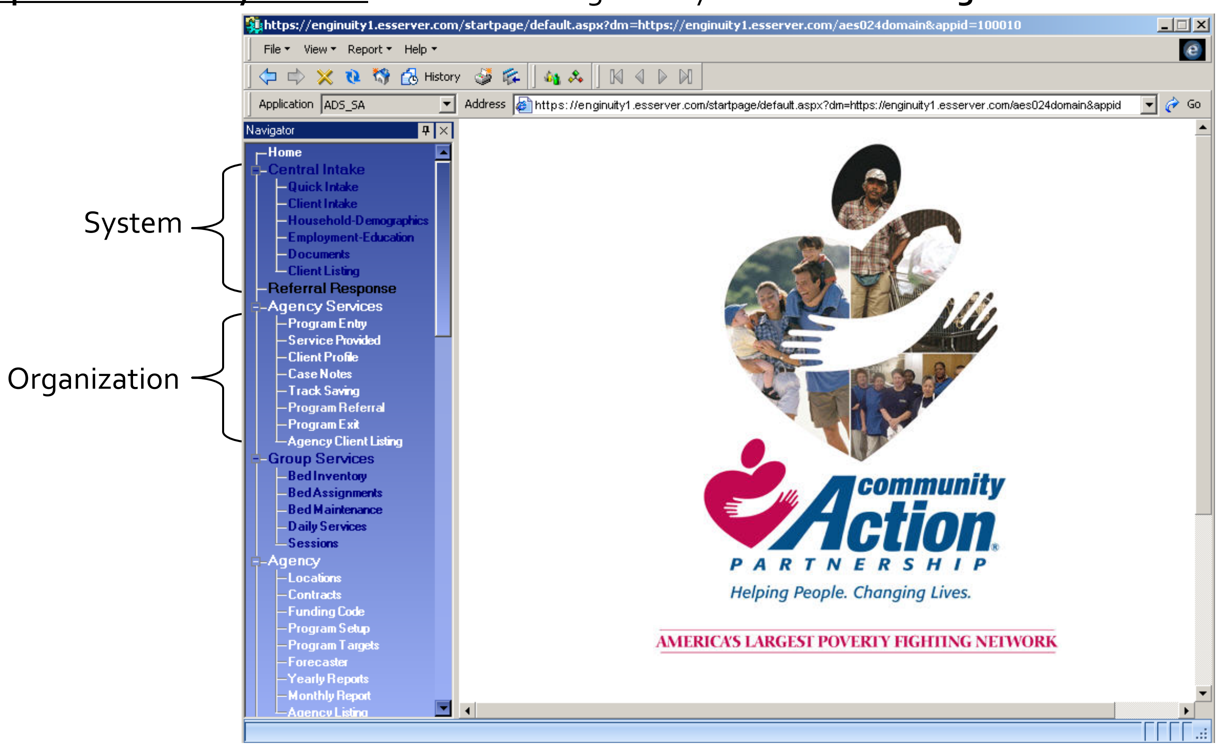
Consent level is an additional security feature to HMIS that determines the HMIS user(s) that will be able to view the information on that screen.

- **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**



***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

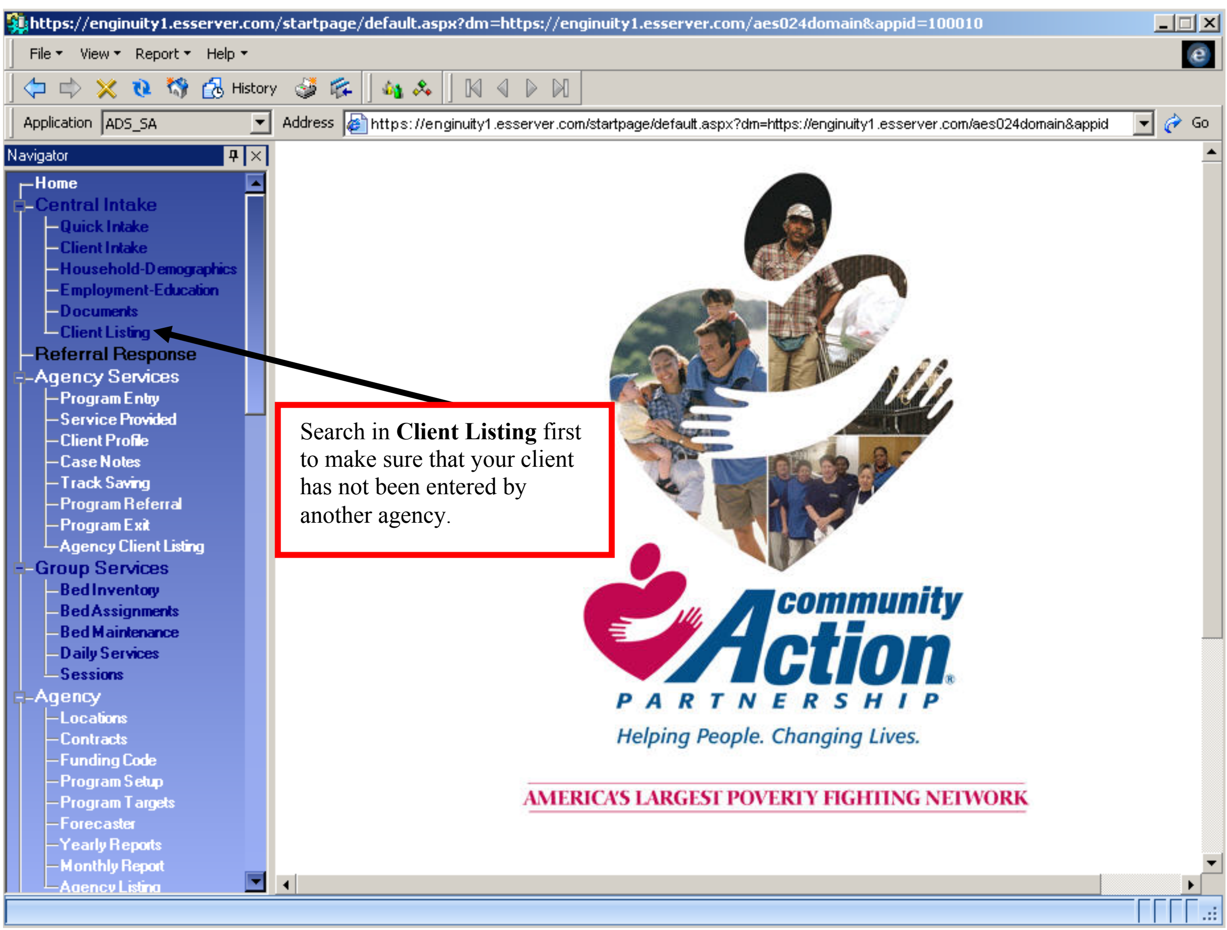
The first thing you want to do before entering a client is search the database to make sure that your client has not already been entered in HMIS before by your agency or perhaps by another agency. There are two areas to search: **Client Listing** and **Agency Client Listing**.

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.

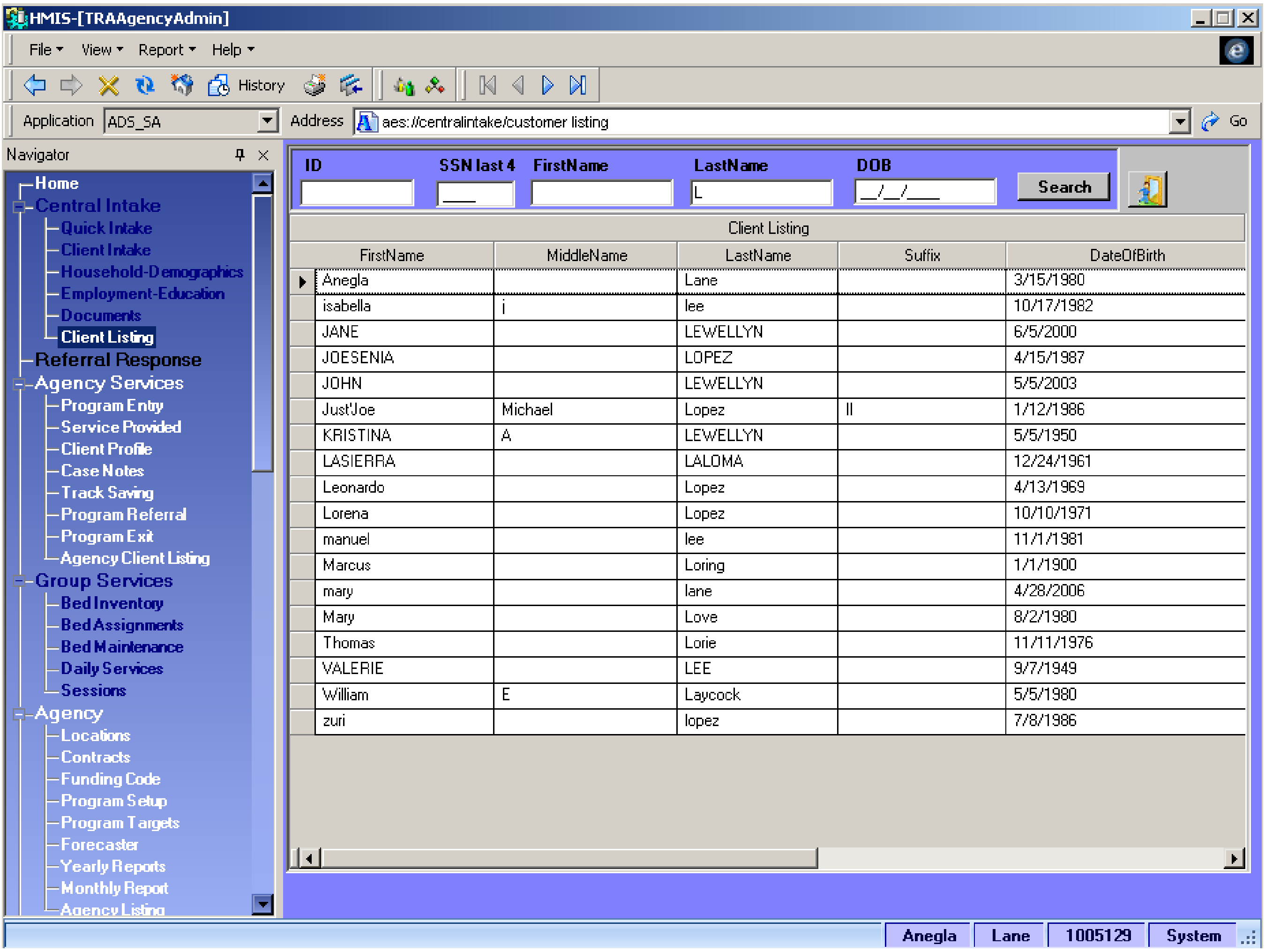
How to Search in Client Listing

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.



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

3. 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.)

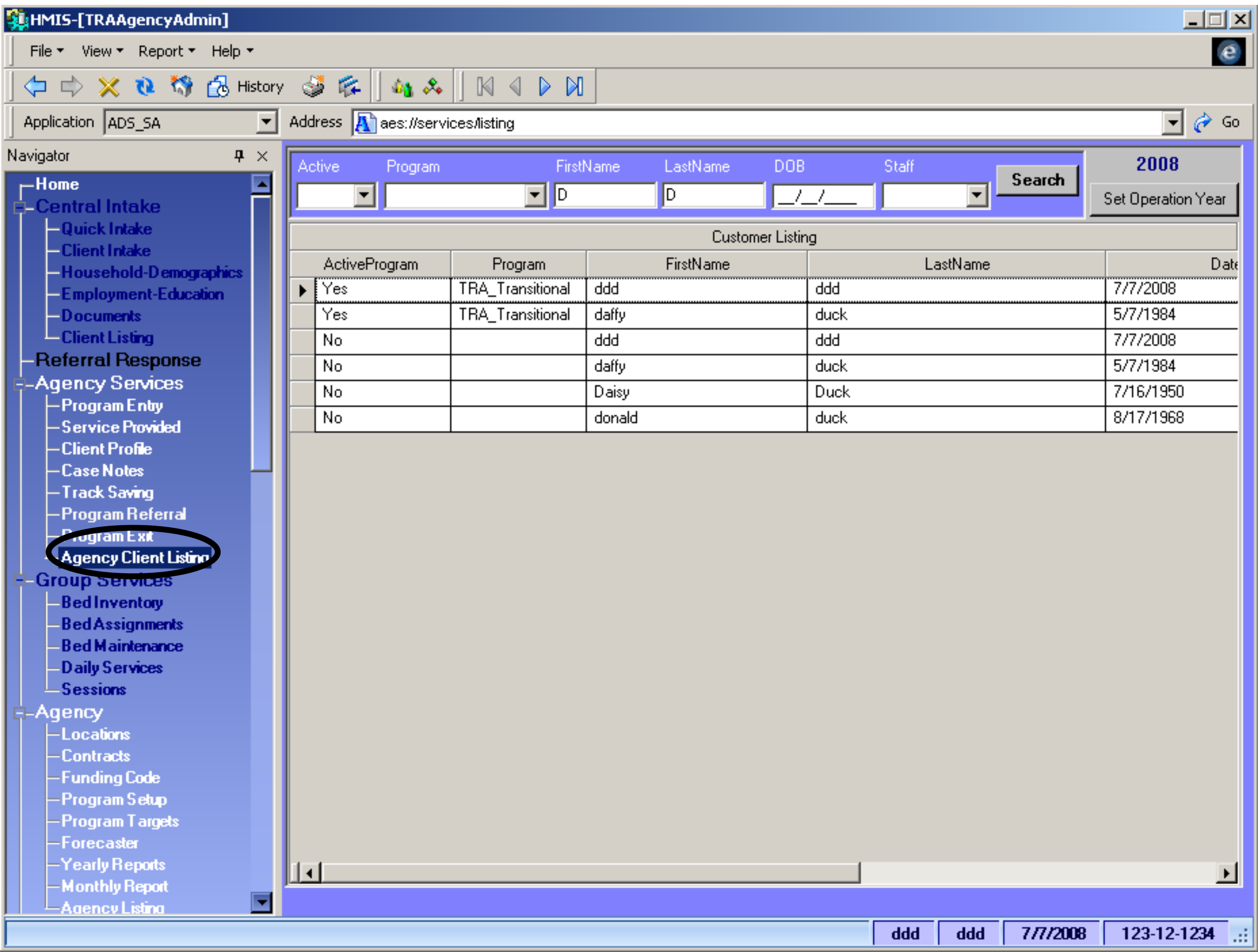


4. If the list of matching clients is too long, enter two or three letters of the first name in the search field and click on **Search** again**.**
5. To sort the names in alphabetical order, click on the heading you want to sort by (e.g., **Last Name**).
   a. **If a client does not show up in Client 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.
   b. **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.
   c. 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.

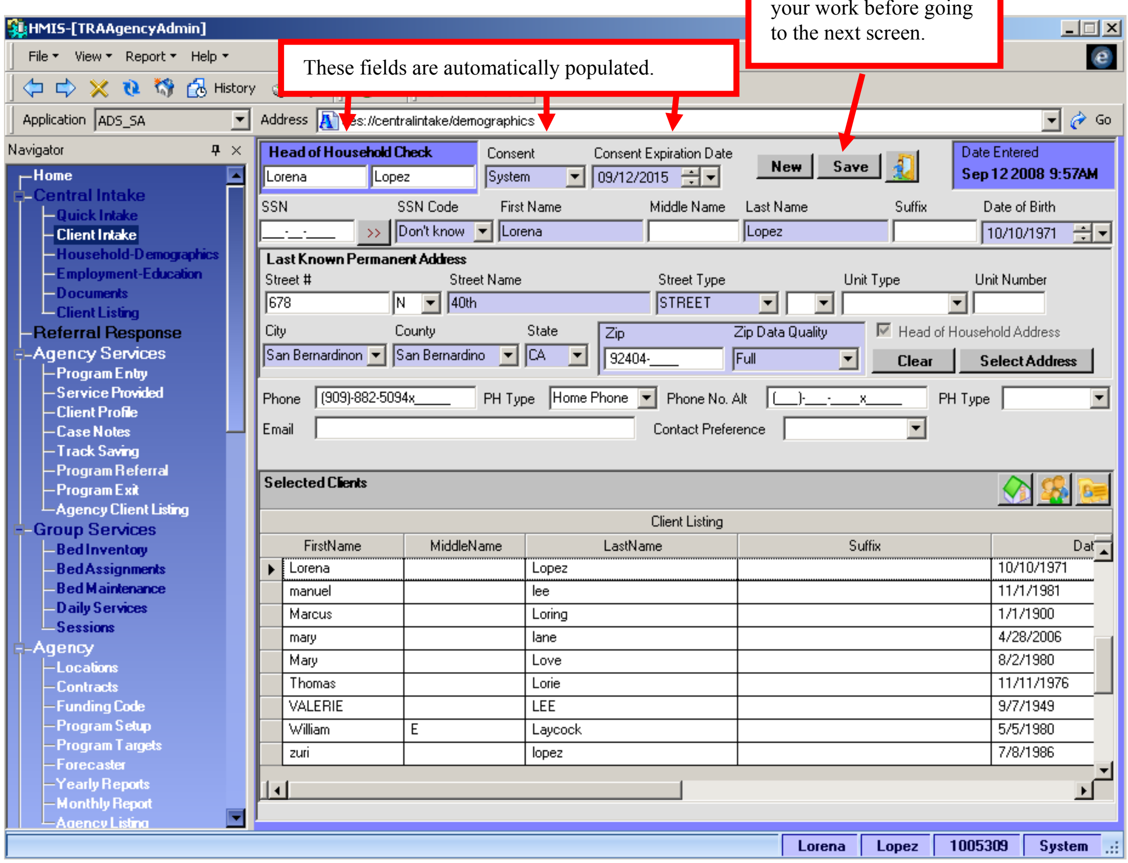
- To find a client who is currently enrolled your program, select **Yes** in the **Active** field.
- To find a client who has been exited from your program, select **No** in the **Active** field.



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).

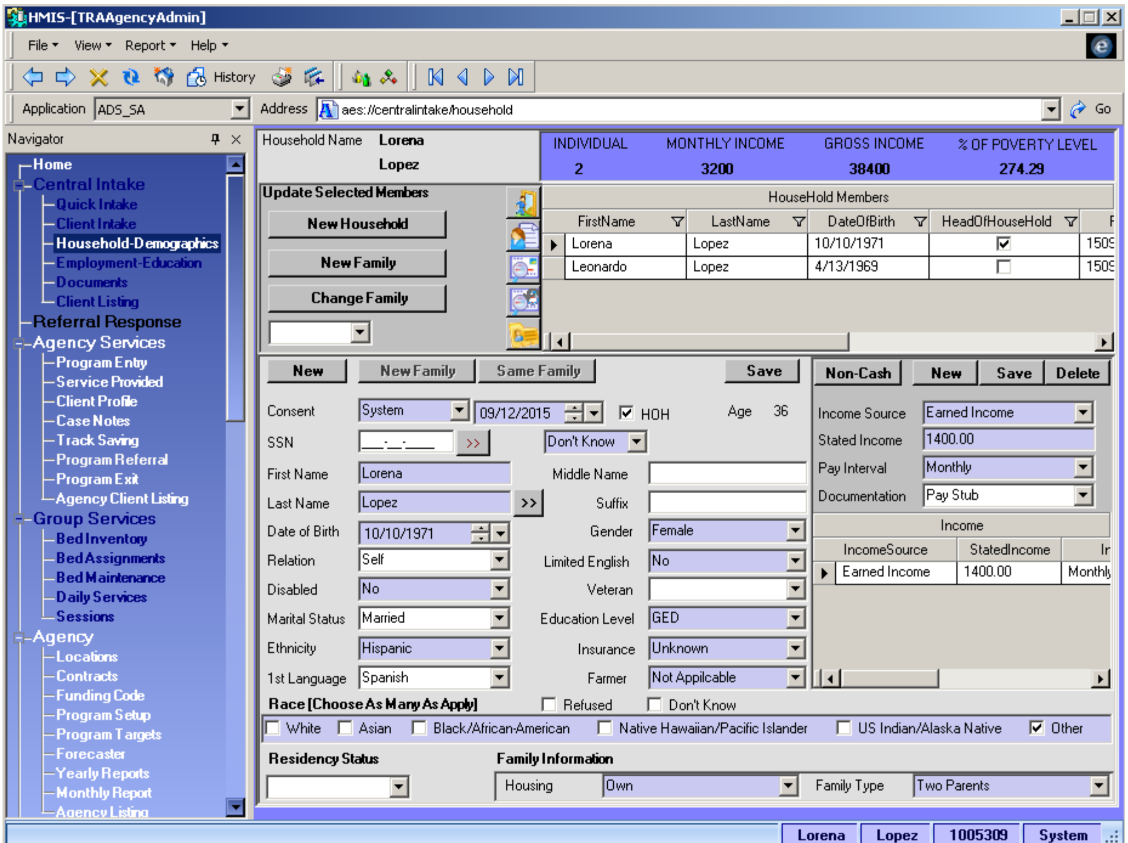


Important Notes About Central Intake

- 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

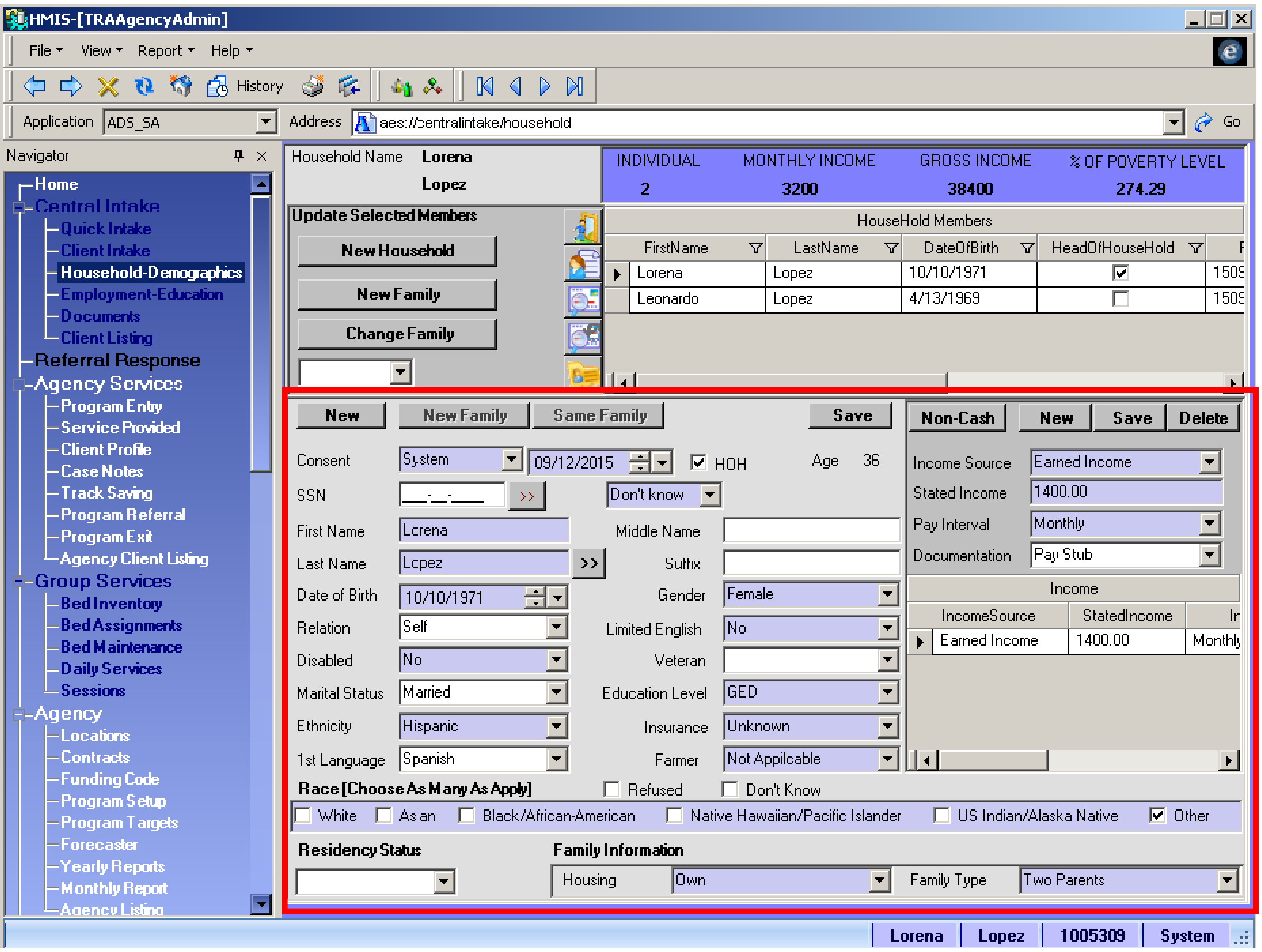
You will notice that several fields are already filled in from the information you entered in **Client Intake**. The remaining **blue fields** must be completed. **Note:** The system tabs left to right. If you want to tab between fields, start with the **Gender** field



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

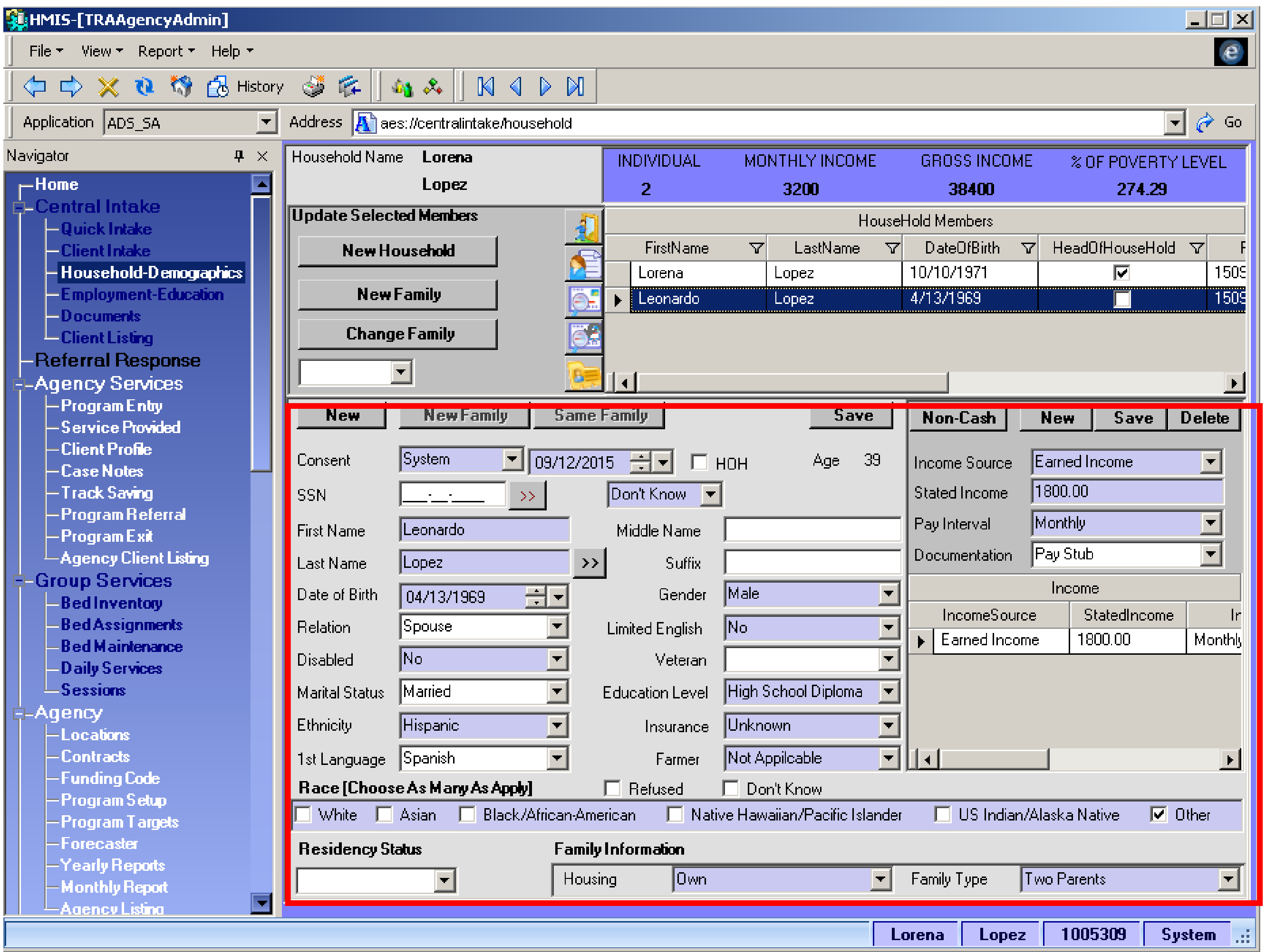
Household members can be added to the same family or a new family on the **Household Demographics** screen.



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.

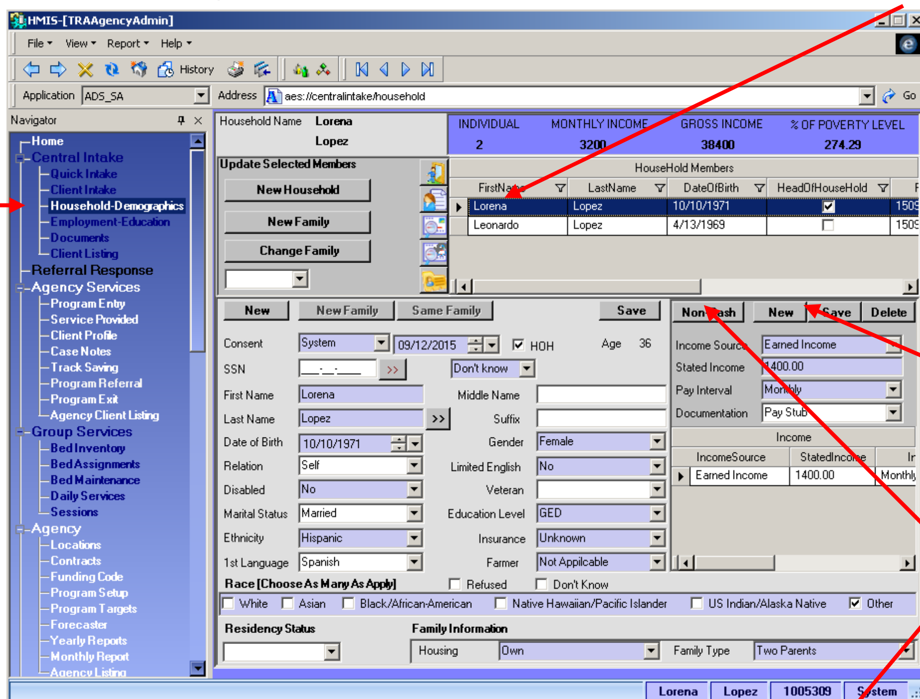
Adding Household Members to Client Intake

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.

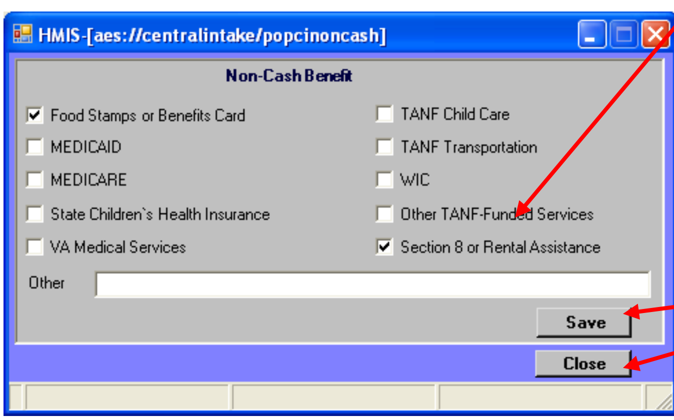


Entering Income and Non-Cash Benefits

- **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.



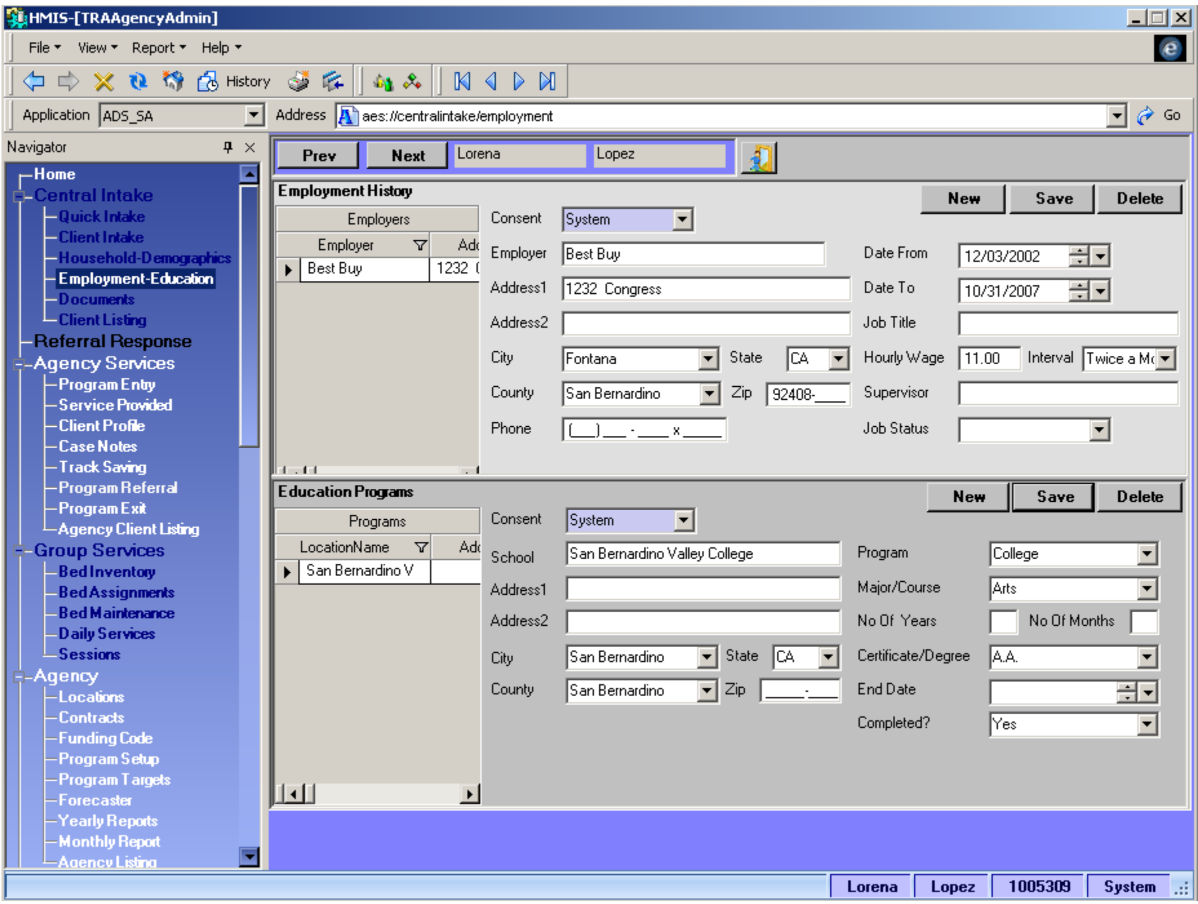
- **Step 3**: Click on **New** and enter the income sources and amounts at time of entry to the program, then click **Save**. (see arrow 3 above pointing out the container where income is entered)
- **Step 4**: If the client receives a non-cash benefit, such as food stamps, click on the Non-Cash Benefit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



- **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.



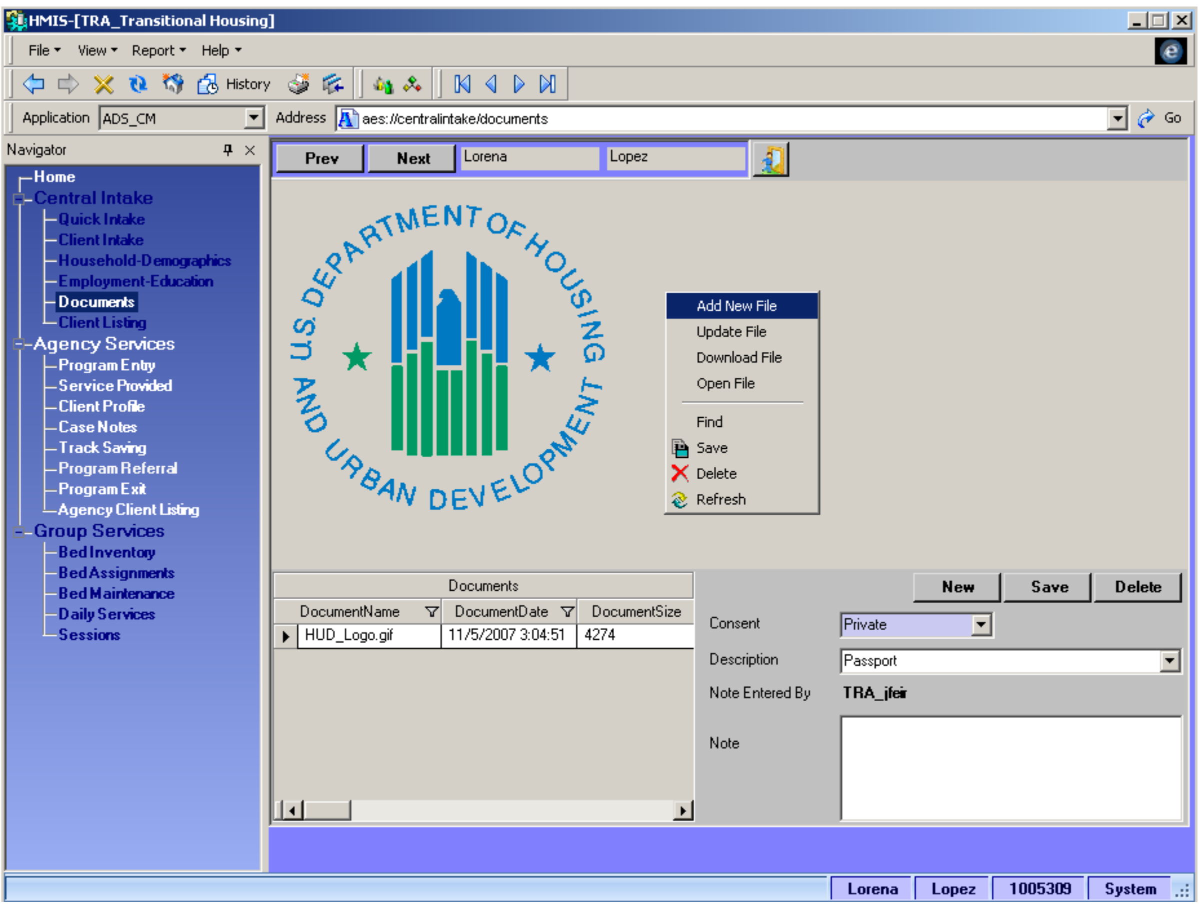
1. Make sure the correct client's name is at the bottom of the screen and click on **New** in either the Employment section or the Education section.
2. You must enter a **Date From** (beginning date of employment). For a current employer, leave **Date To** blank. All other fields are optional.
3. After 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.

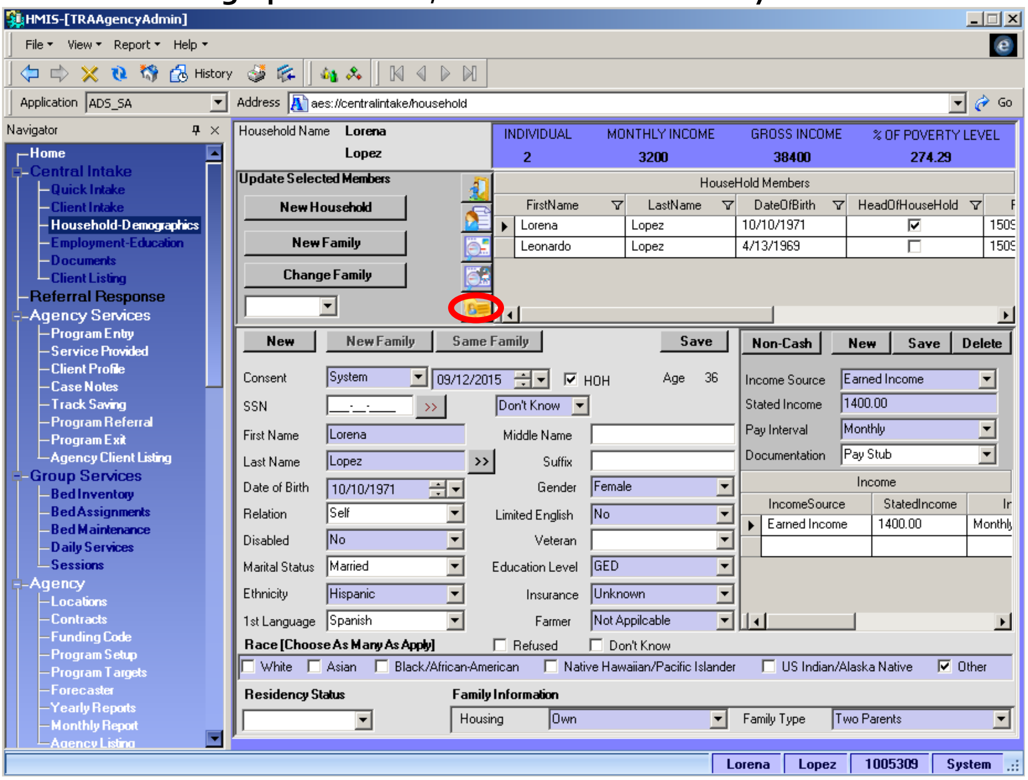
1. Right-click anywhere on the screen and select **Add New File.**



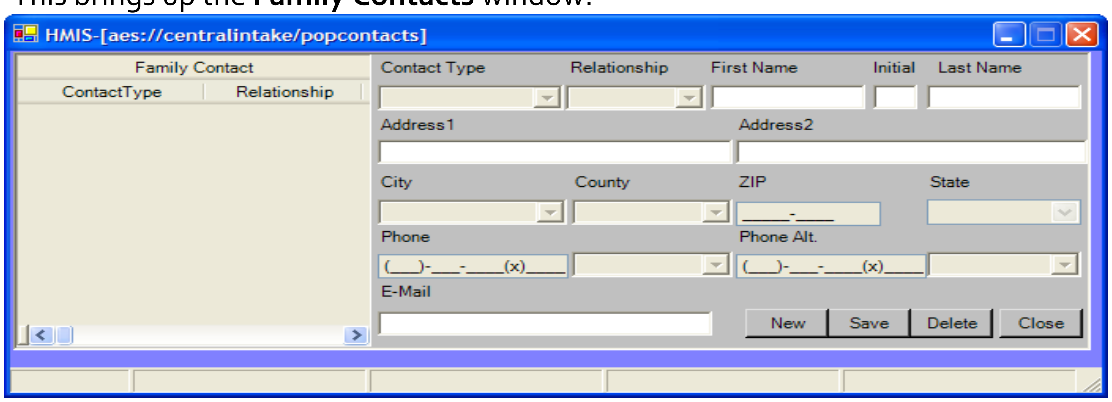
2. In the pop-up window, select the file name and click on **Open**.
   - Choose **Consent** level (usually System) and enter a **Description** and **Note** if desired.
   - Click on **Save.**
3. If you uploaded a scanned document, it will appear on the page.

Entering a Client's Family and Emergency Contact Information

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



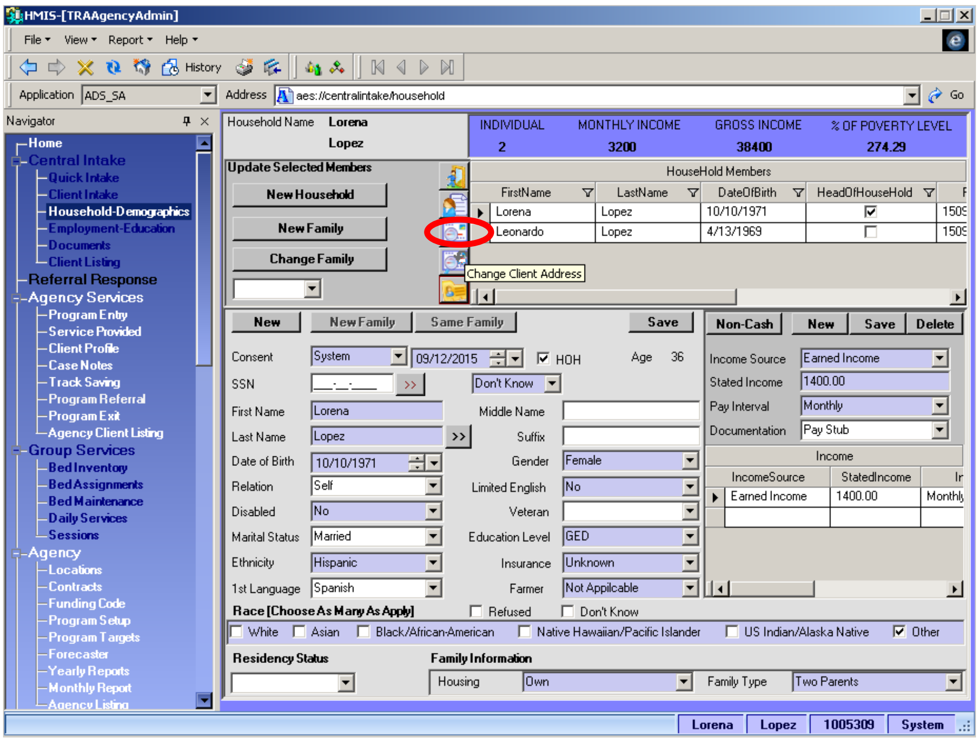
- This brings up the **Family Contacts** window:



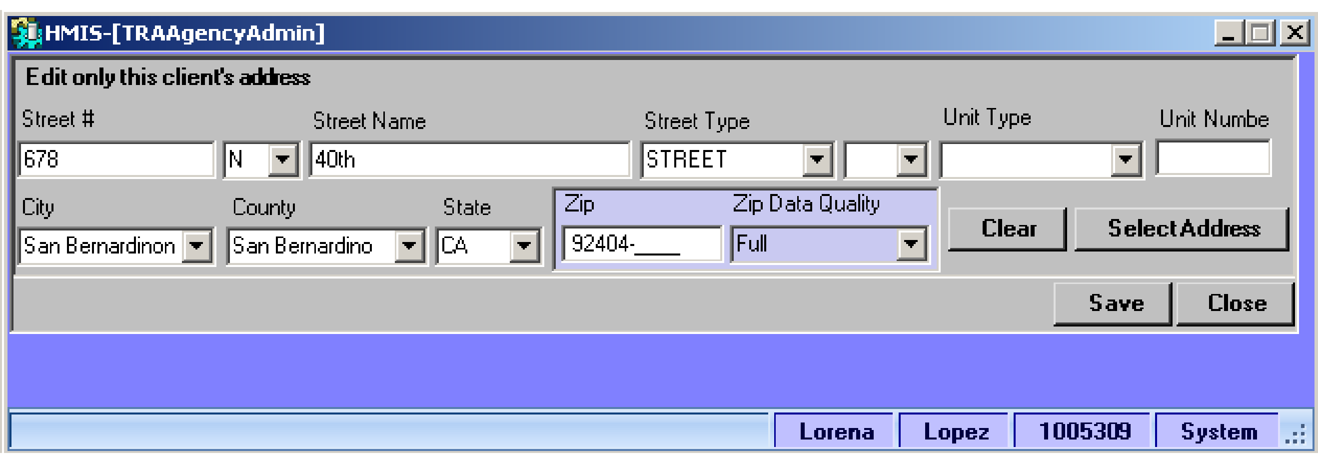
- Click on **New**, enter the information, click on **Save** and **Close.**

Changing a Client's Last Known Permanent Address

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



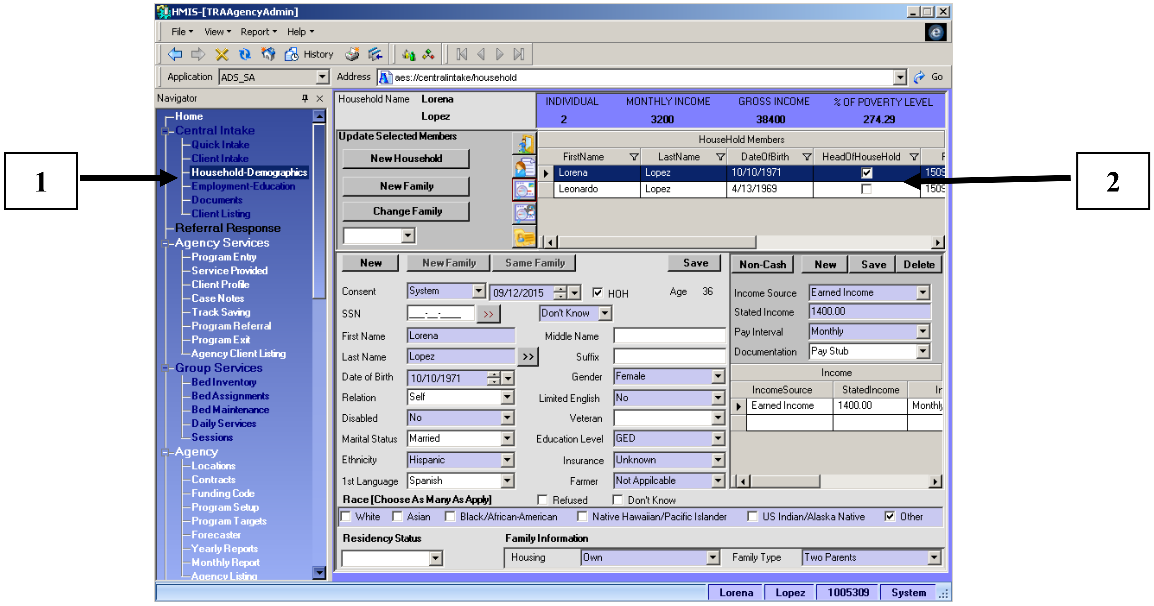
- This brings up the **Address History** window:



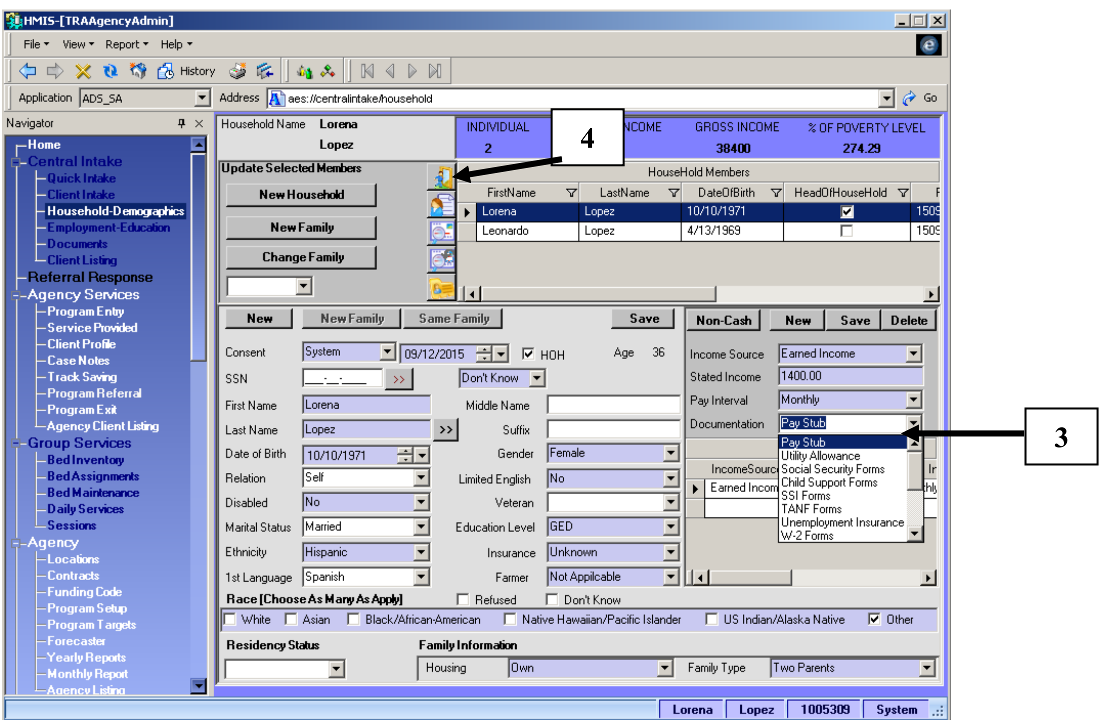
- Enter the new address and click on **OK**.

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.



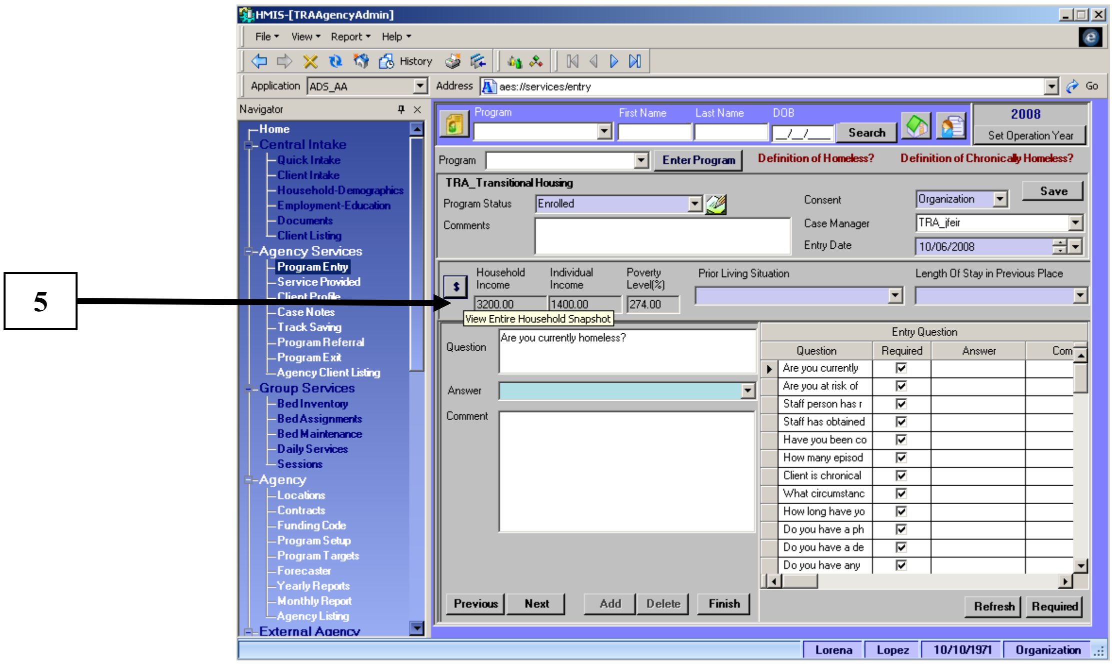
- **Step 3**: Work within the Income Container (#3 below) to enter the new income or make any changes to existing income and non-cash benefits. Remember to click **New** and **Save** for each new income, or click **Save** after making changes to an existing income.



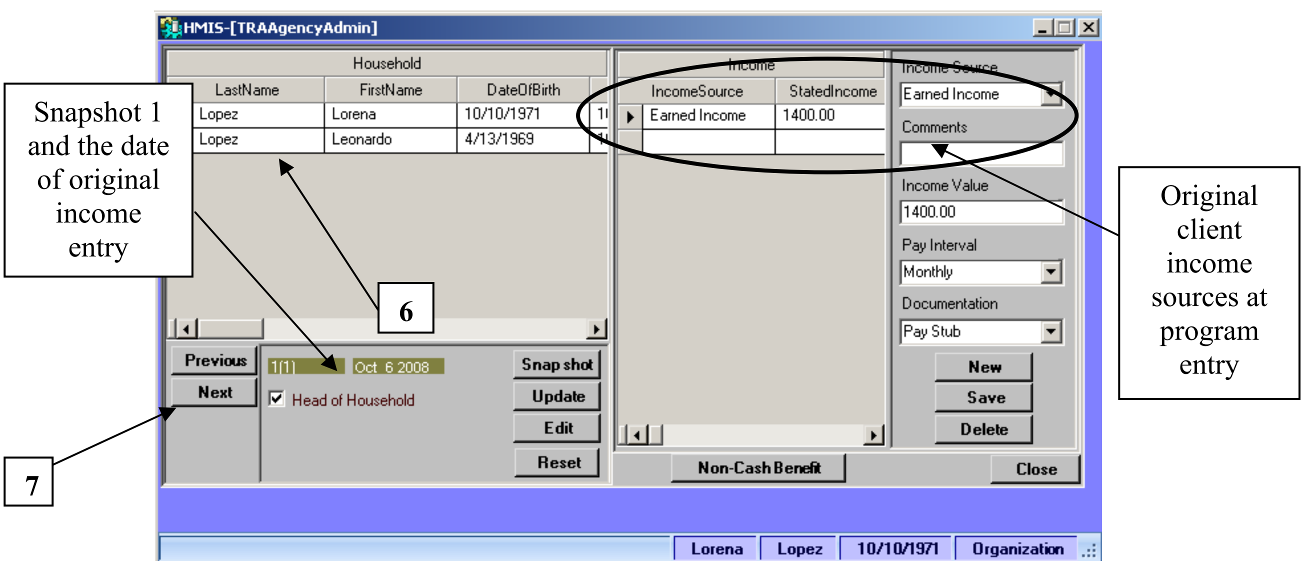
- **Step 4**: Once all income changes have been made and saved, use the "**Jump to Program Entry**" button to take your client to the **Program Entry** screen in the **Agency Services** Library.

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.



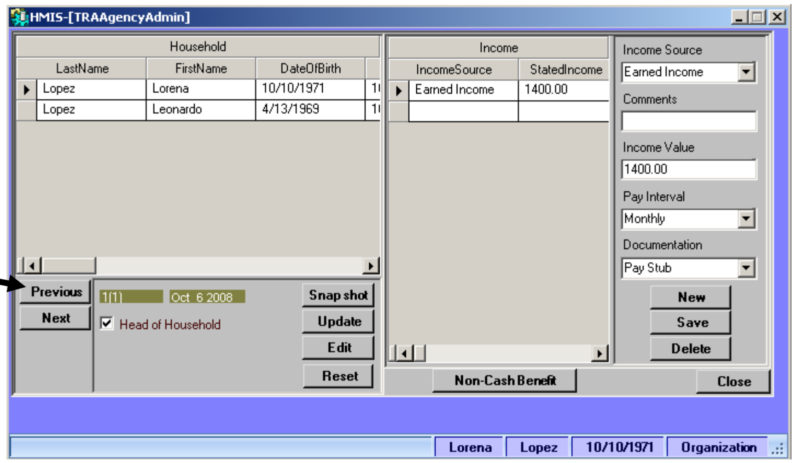
In this pop-up, the original client income at time of program entry will show as snapshot 1.



- 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



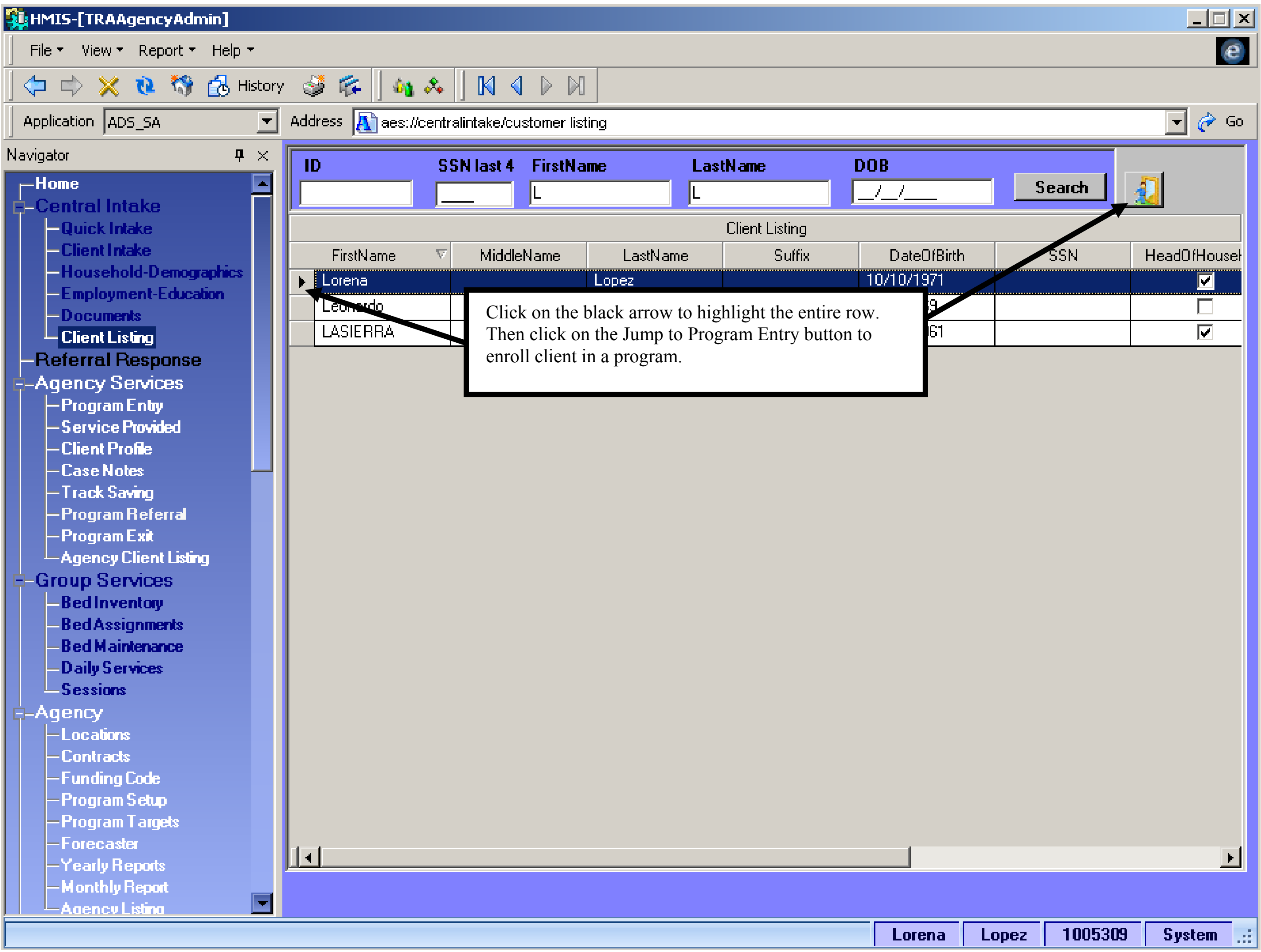
- Remember: Snapshot 1 will be income at entry into program. Whichever snapshot is the last Snapshot will be income at program exit.

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.

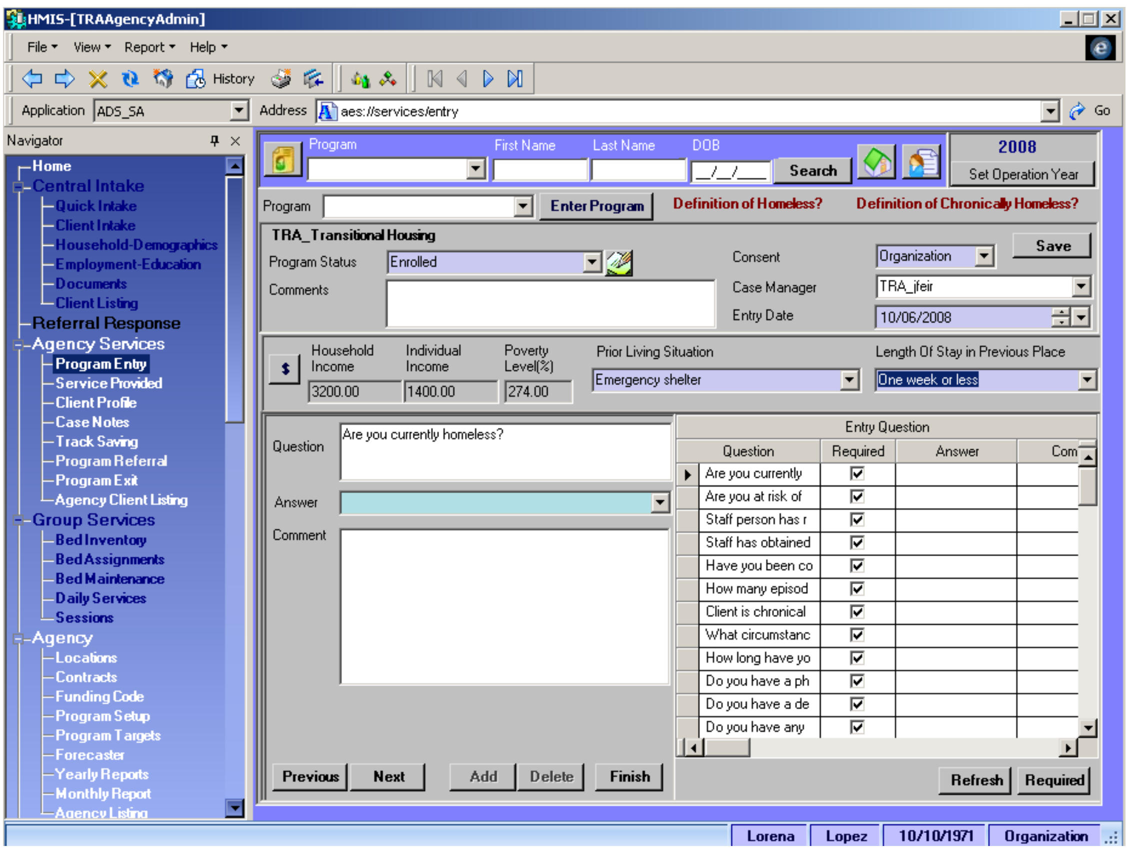


Enrolling a Client in a Program using Client Intake

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)

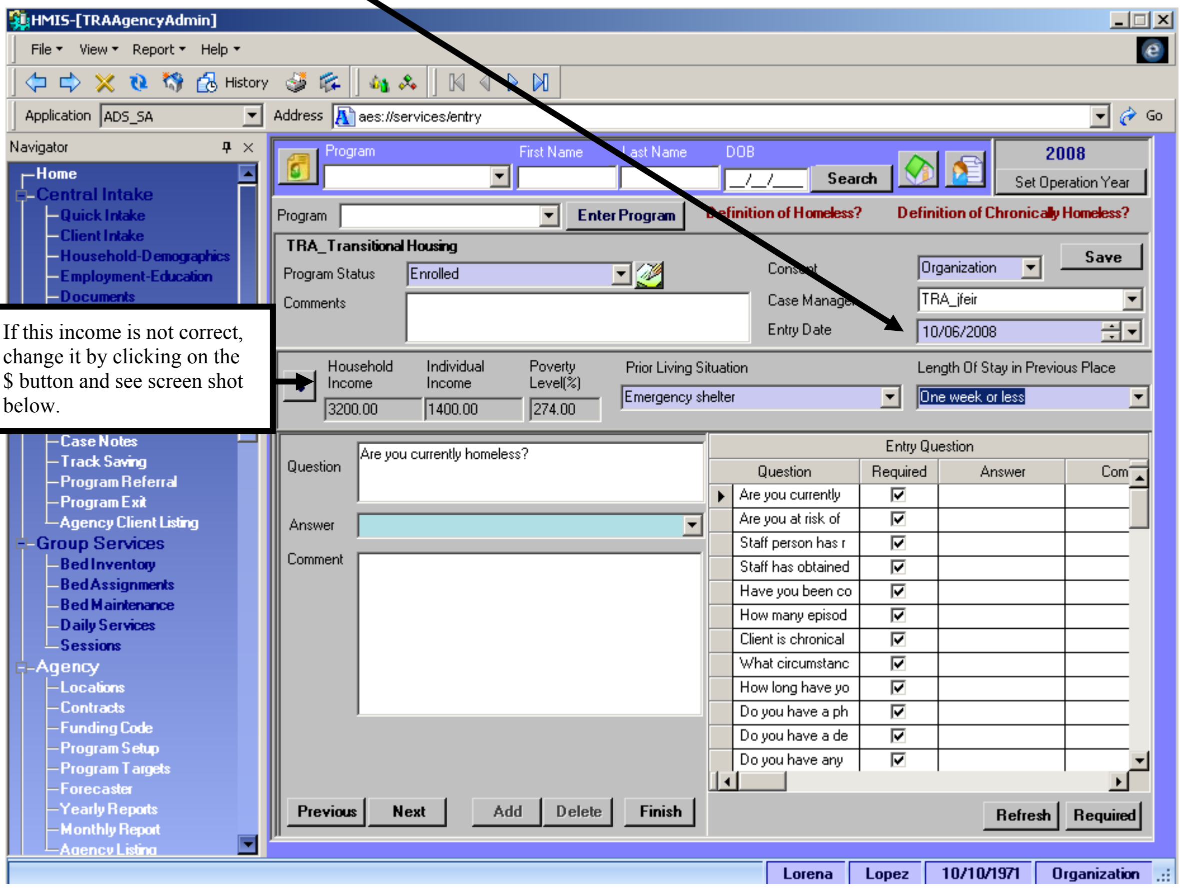
Once you are in the Program Entry screen, you will be able to enroll a client in to a program.



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.

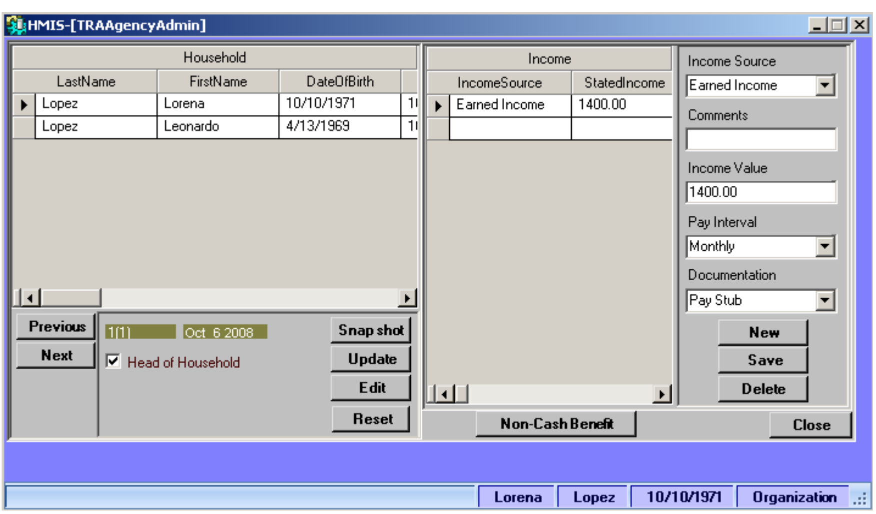
VI. Program Entry (continued)

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



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.

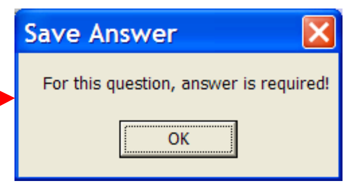


VI. Program Entry (continued)

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.

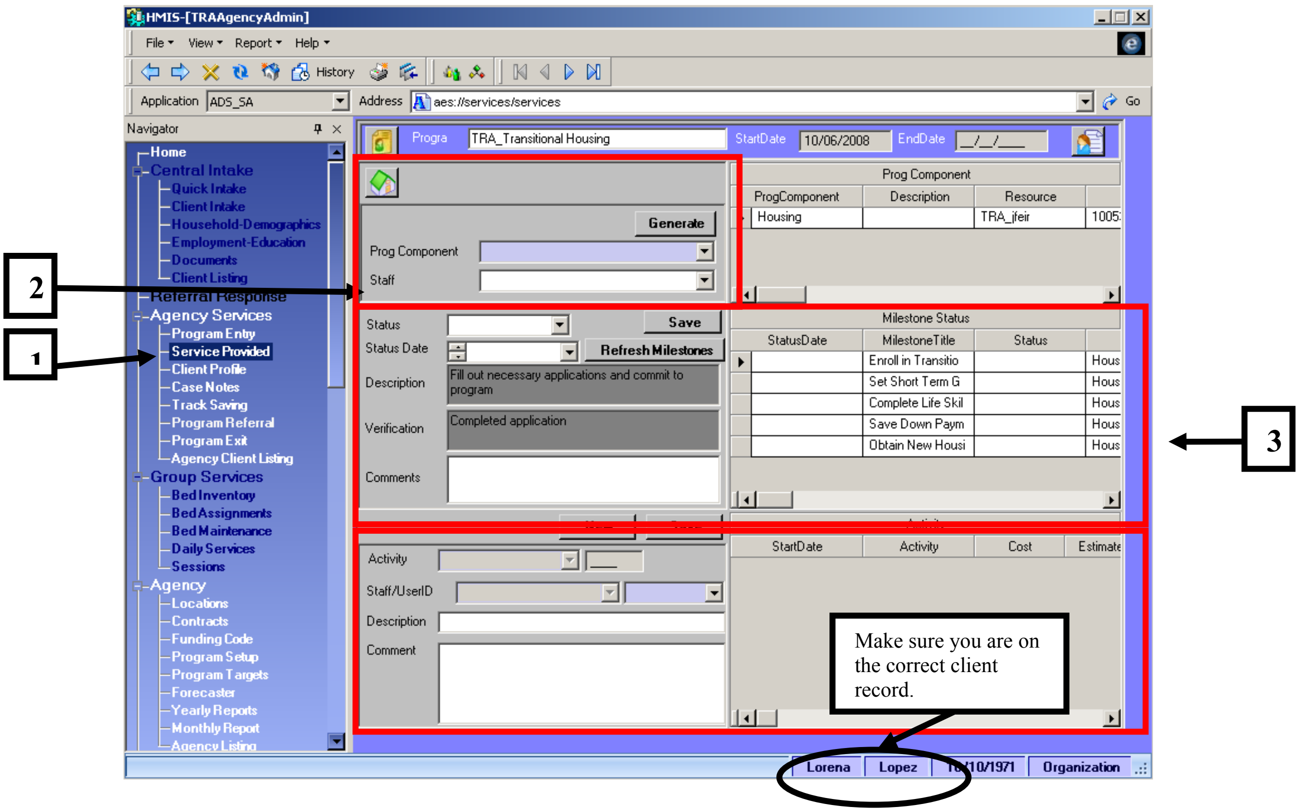
5. **Prior Living Situation** (client's situation immediately prior to entering your program) and **Length of Stay in Previous Place:** Select answers from the dropdown list.
6. Click on **Save** (top right corner of window).
7. Click on **Required** (at bottom right corner of screen) to shrink the Program 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.



1. Click on the **Service Provided** screen.
2. 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.
3. 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).

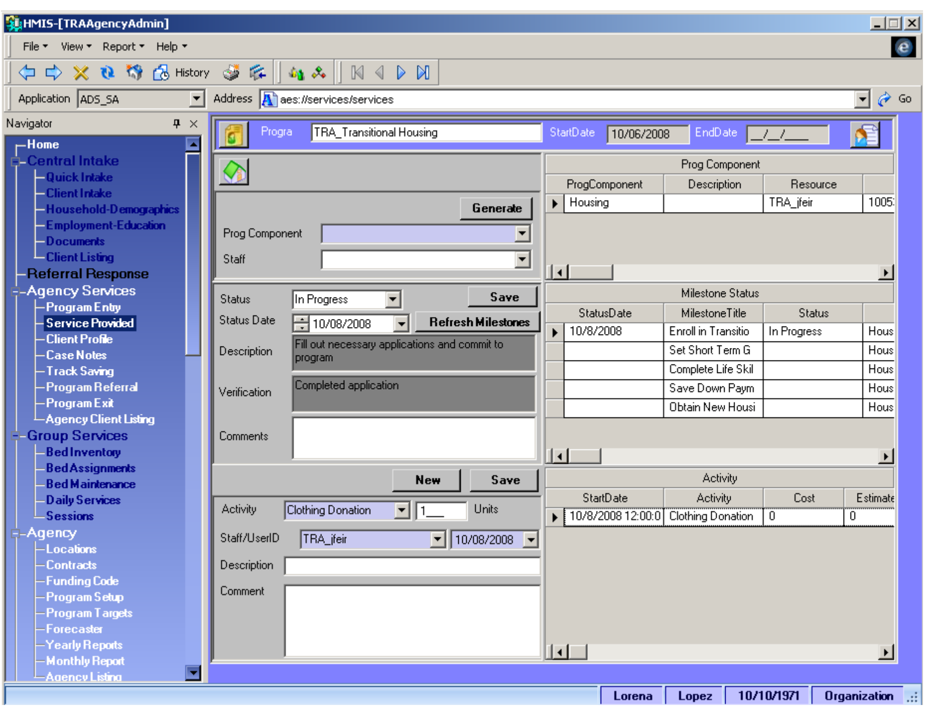
- **Status Date:** This can be any date between the date the client enrolled and the date they are exited from your program.
- Click on **Save** next to the **Status** field.

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.



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.

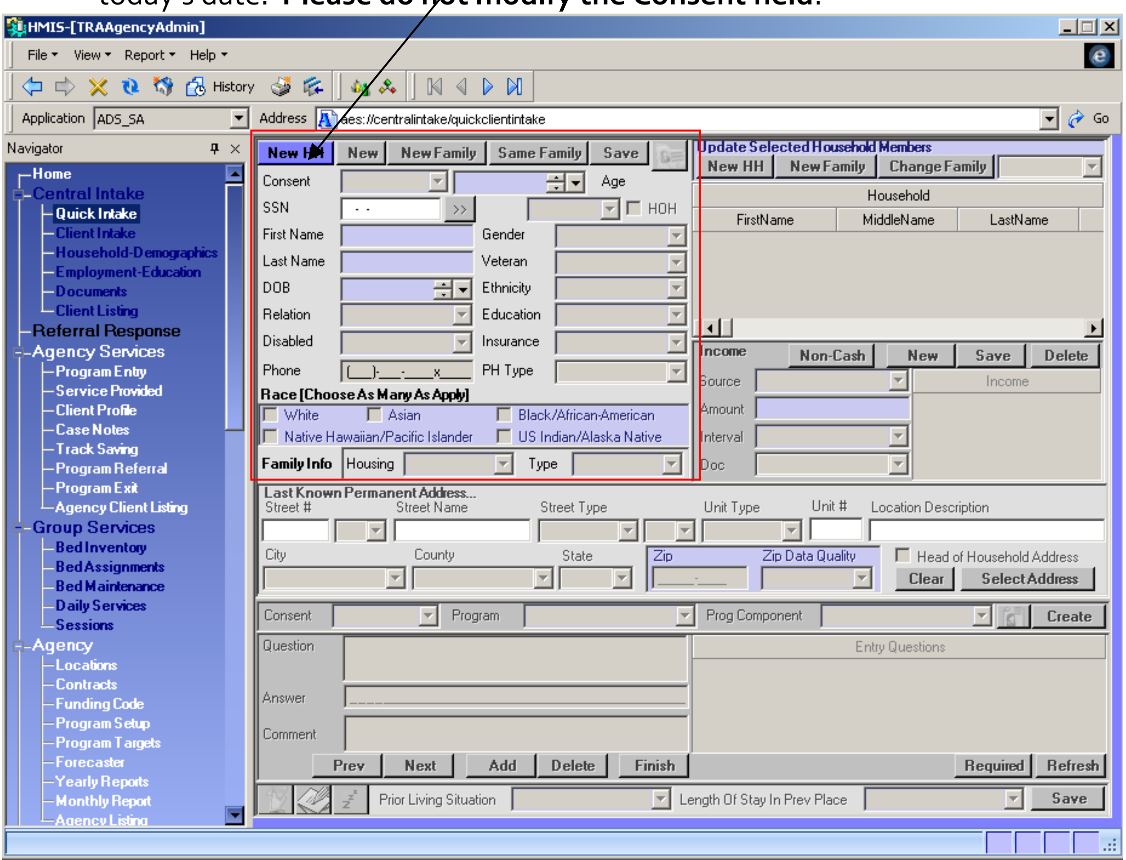
VIII. How to Enter a Client in Quick Intake

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.

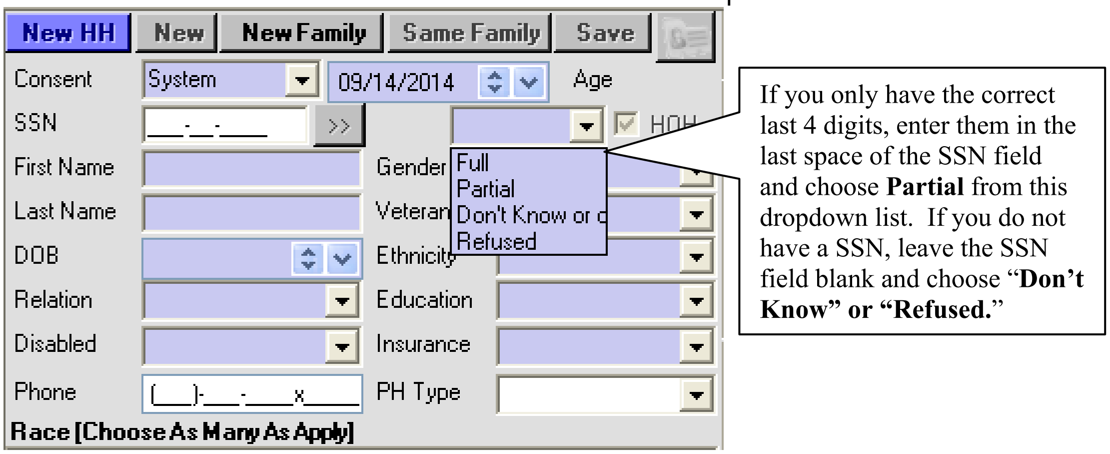
Adding A New Client To HMIS Using Quick Intake

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**.

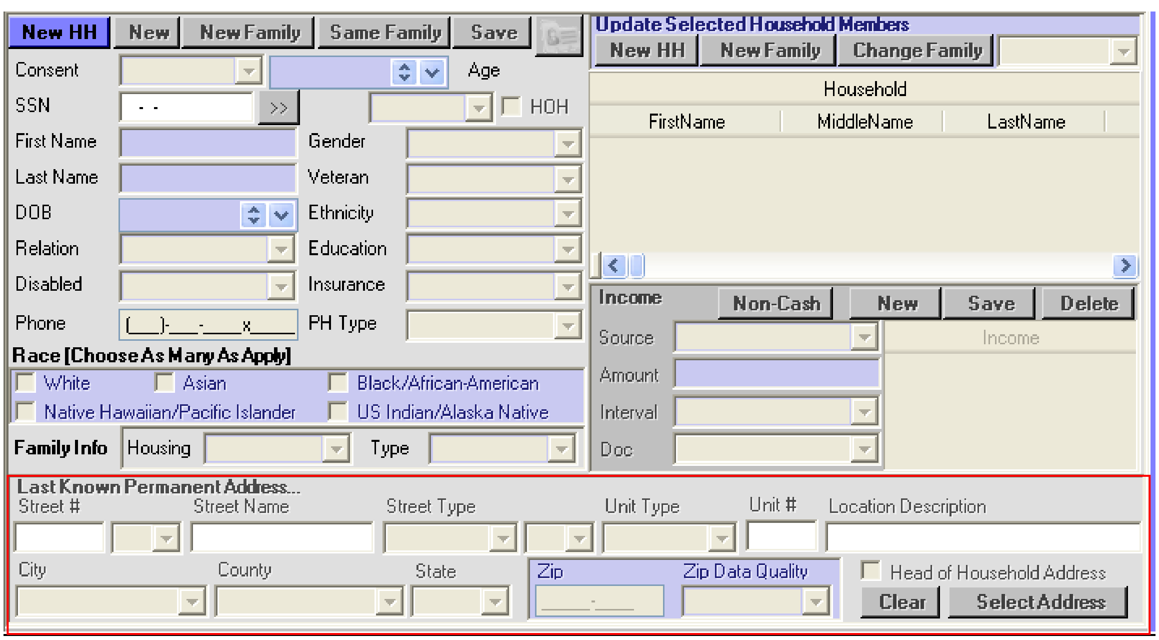


How to Enter a Client in Quick Intake

3. 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.



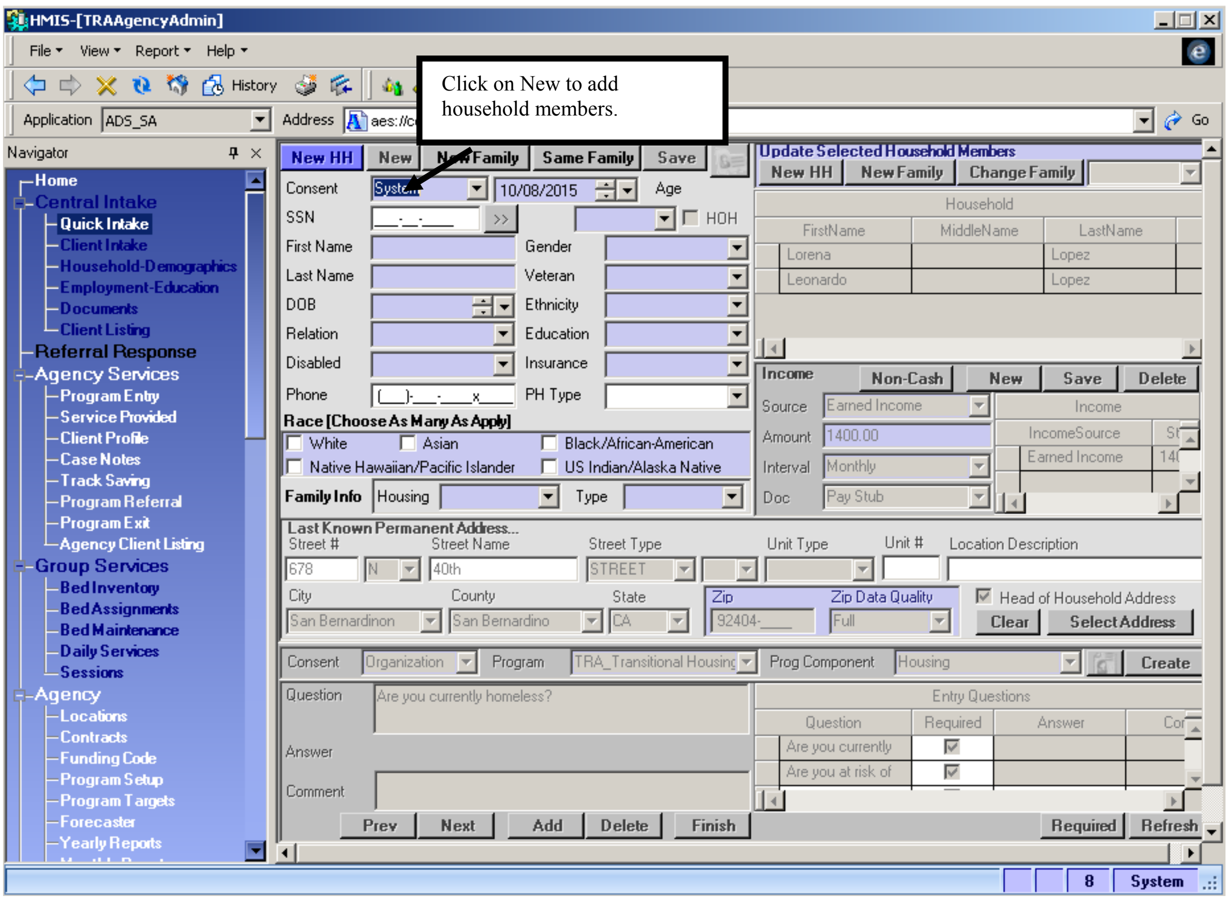
4. Finish entering the rest of the required (purple) fields and Phone & PH Type if necessary.
5. Select **Race**.
6. Select **Housing** and **Type** from **Family Info** section.



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

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

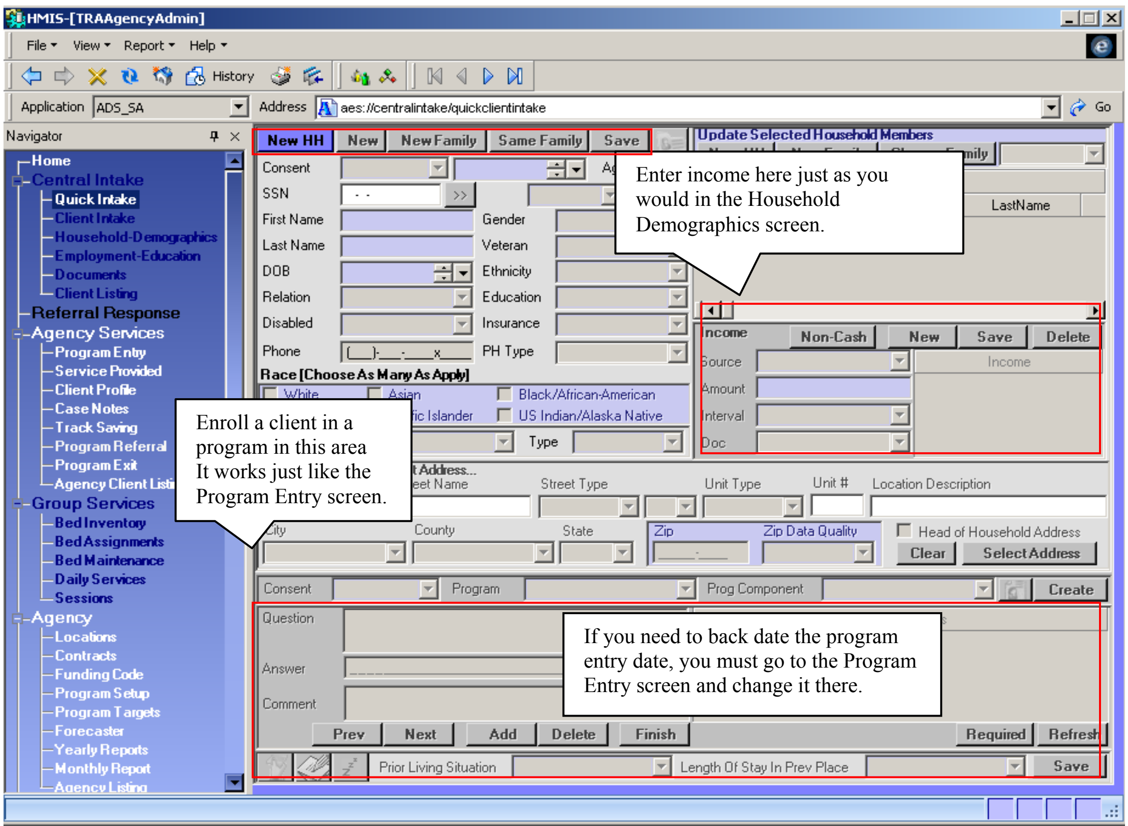
There are a few things to consider when adding additional family members to an already existing household. Ask these questions: Are they a member of the same family or will they be a member of a new family within the same household? The concept here is that you can have many families within a single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



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.



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.

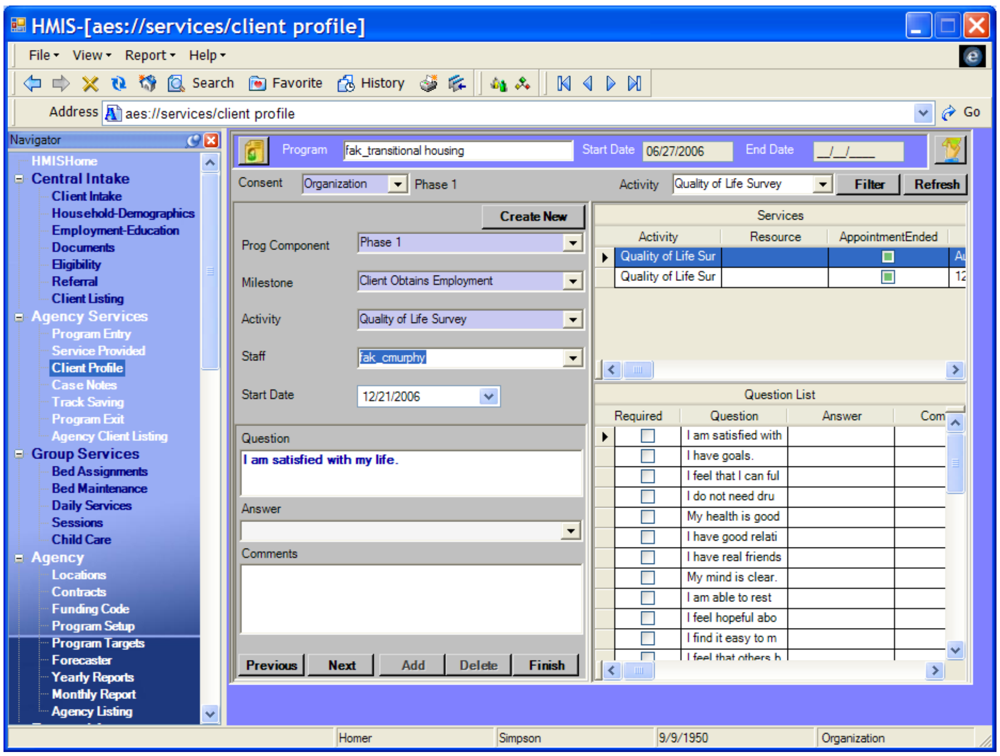
Same Family – Saves the person into the household into the "same family" as the Head of Household. For example: You are adding a child to the Head of Household. You would click "**NEW**" to add the child and then you would click on "**Same Family**" to signify that the child belongs to the same family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

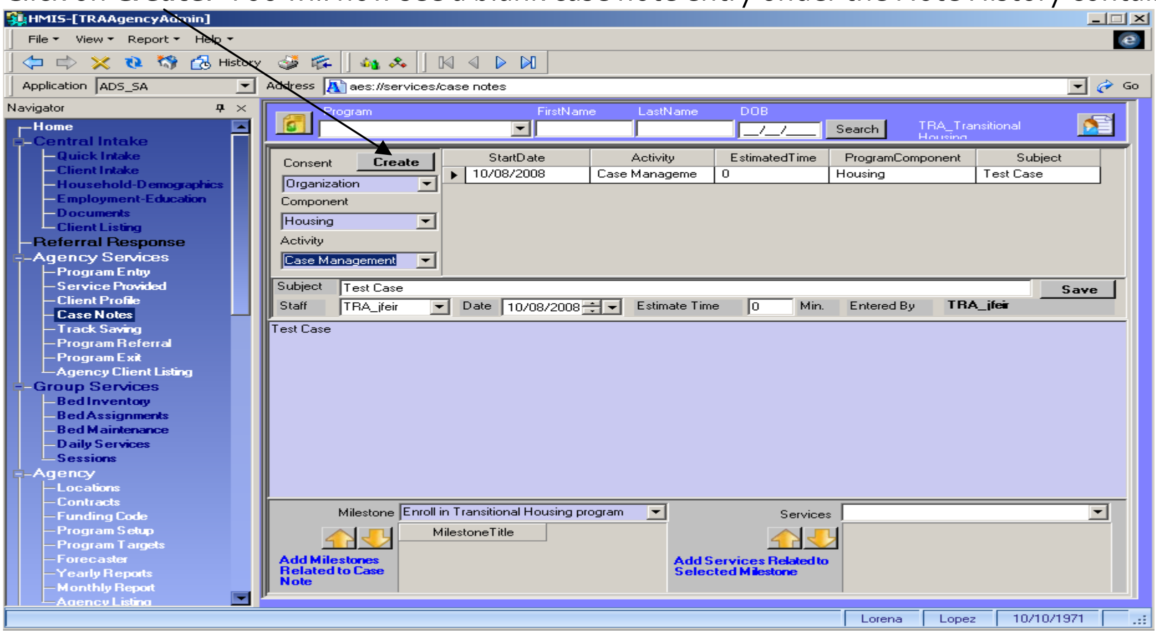


1. Make sure the correct client's name is at the bottom of the screen.
2. Select **Consent** (Organization) and **Activity** (questionnaire name) at the top of the screen and click on **Filter**. This brings up the question bed.
3. Complete the remaining blue fields using the dropdown menus.
4. Answer 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.

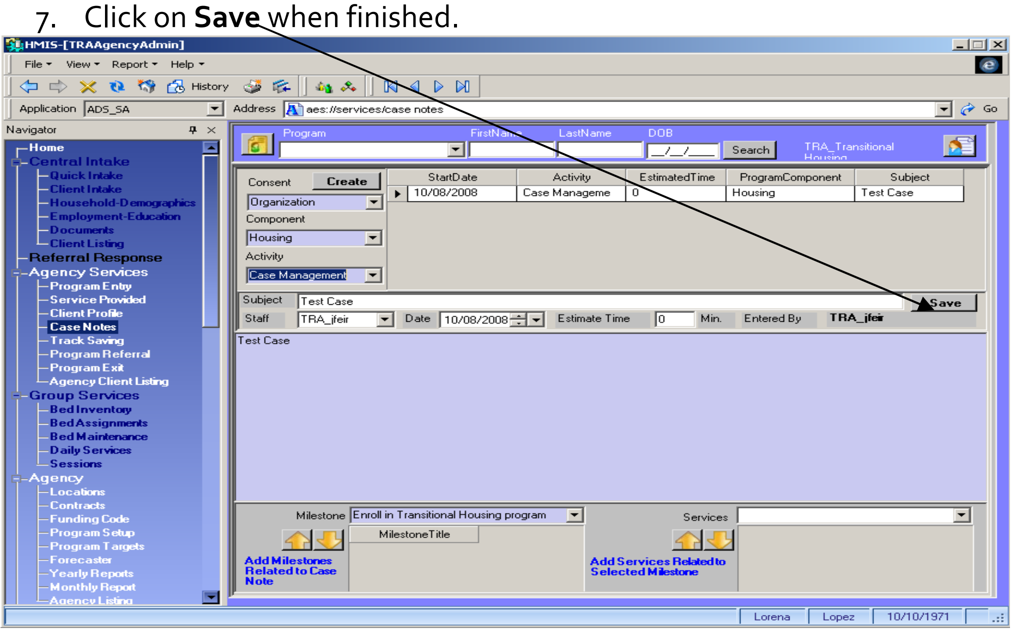
Case Notes

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.

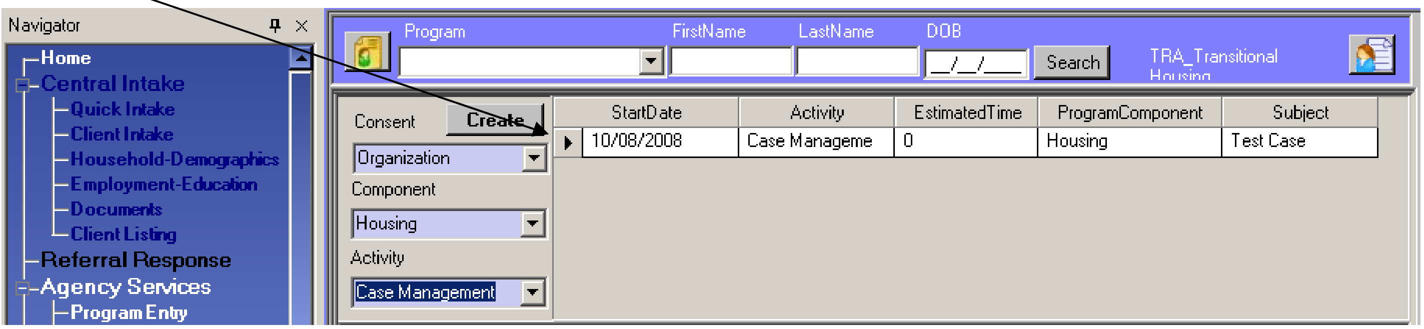


5. In the next section underneath **Note History**, enter the **Subject**, **Staff Initials**, **Date** and **Estimate Time**.
6. Click your mouse in the open blue space and begin typing your notes.
7. Click on **Save** when finished.



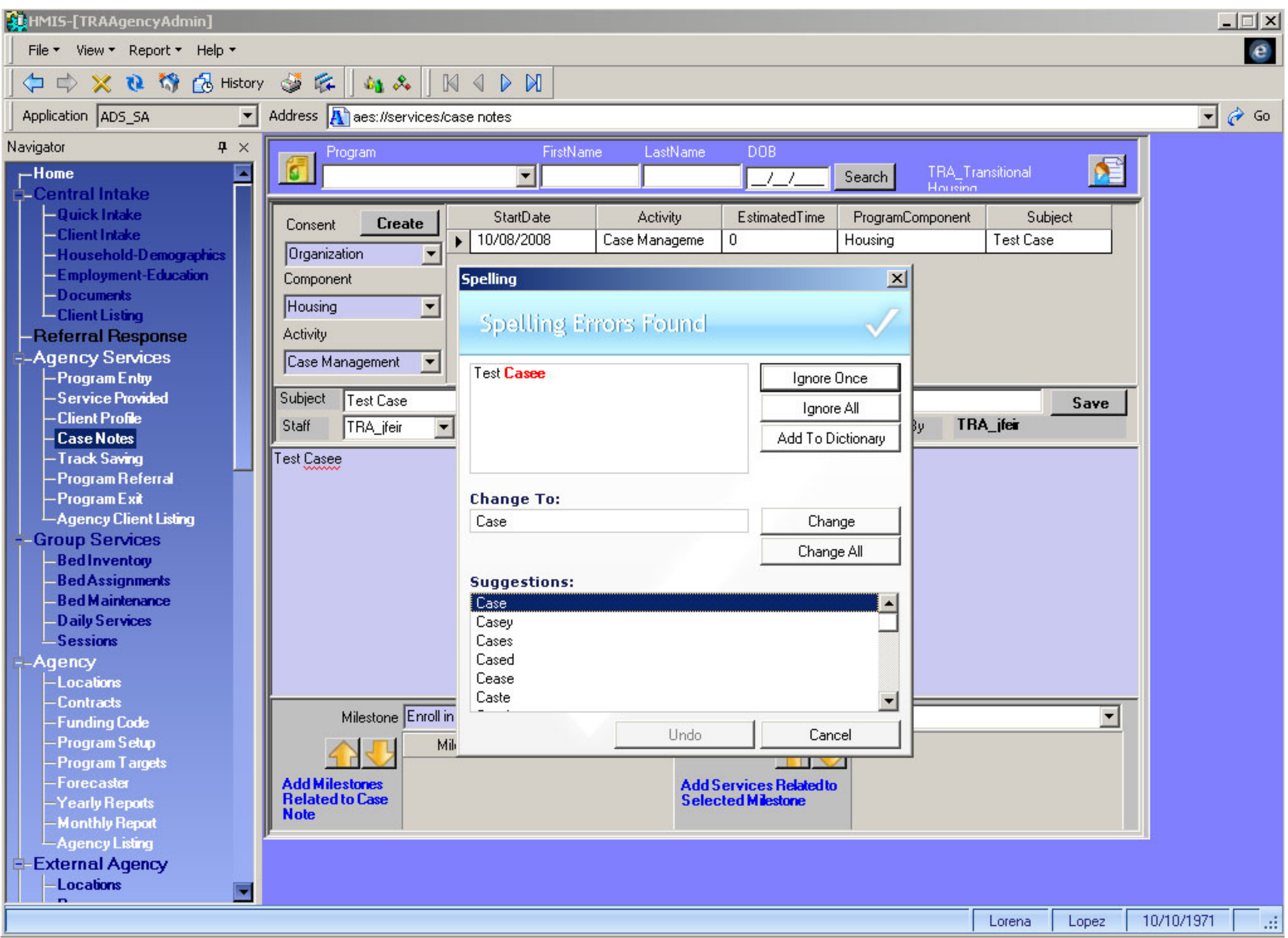
Case Notes

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



Spell Check in the Case Notes Screen

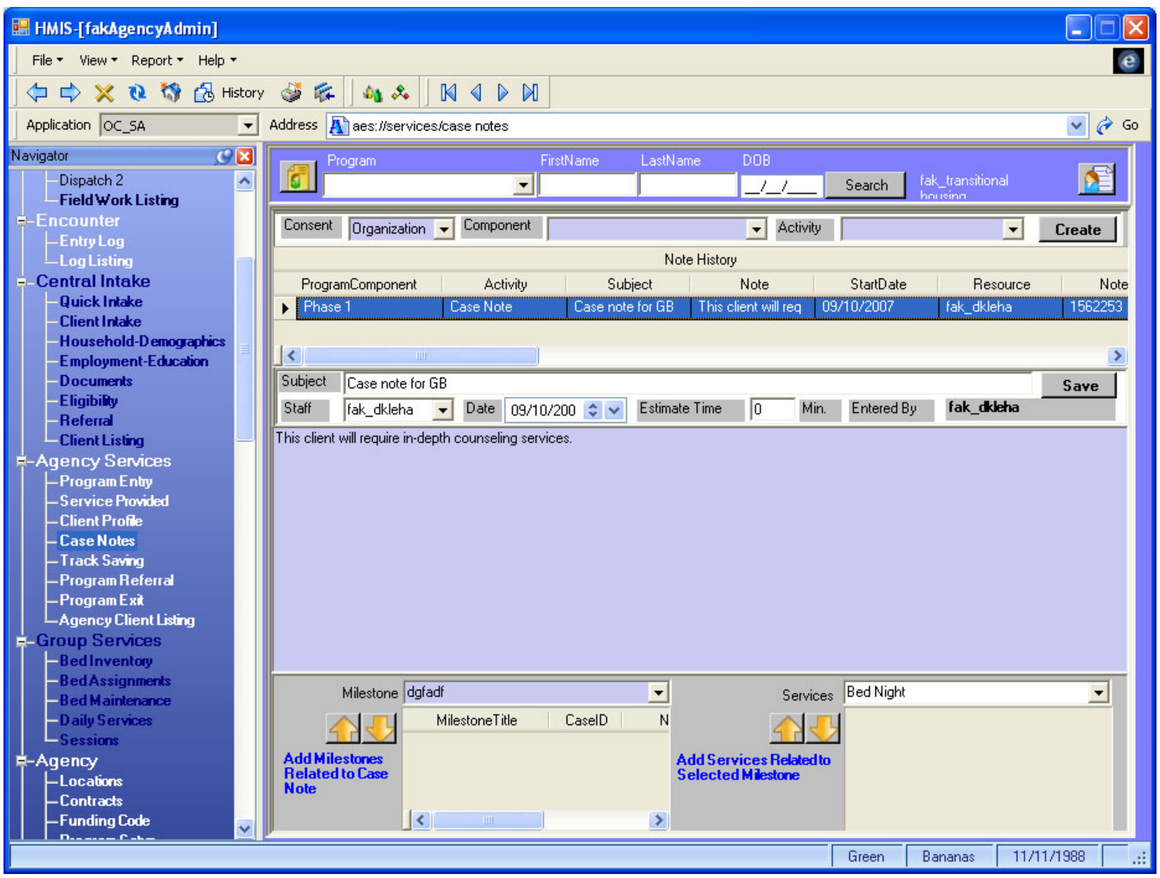
A Spell Check box will automatically pop up if you misspell a word. It will do an auto run as you are typing and when you click out of the typing area, and if a word is misspelled, you will get a pop up box showing the errors found. After accepting changes, click on Save.



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

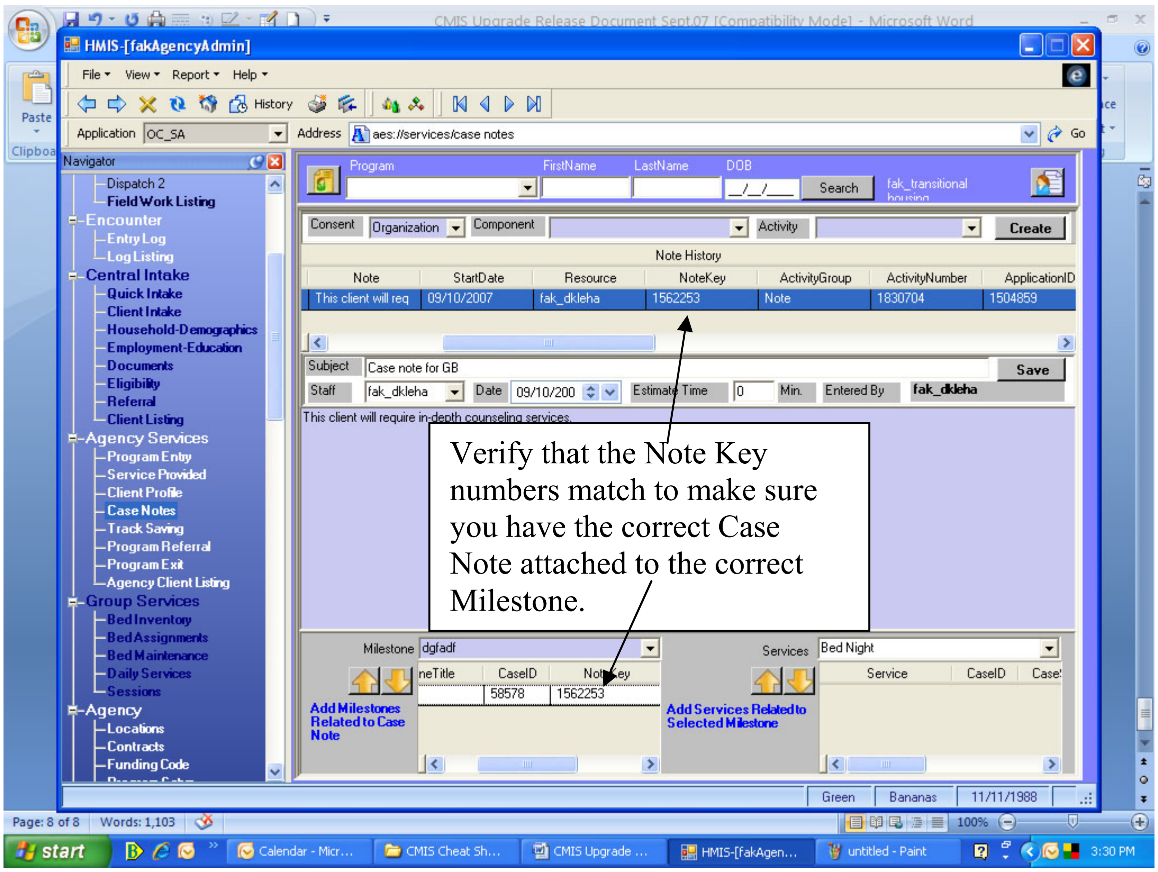
1. Highlight the case note that you wish to add a milestone to by clicking on the black arrow to the left on the case note entry. Make sure that the whole row is highlighted in blue.



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

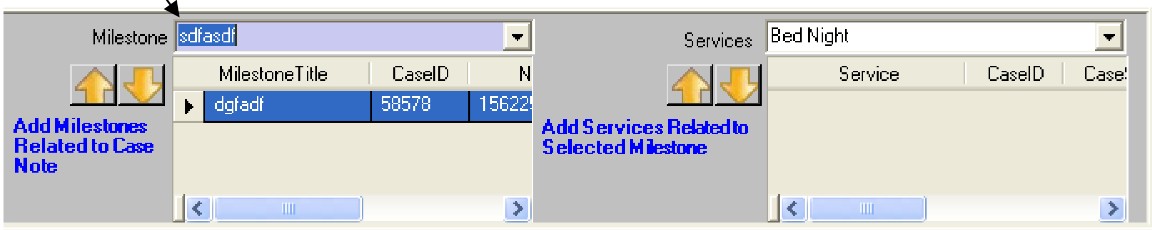
When working with multiple case notes and milestones you can verify that you have the correct Case Note attached with the correct Milestone by matching up the Note Key numbers as shown below.



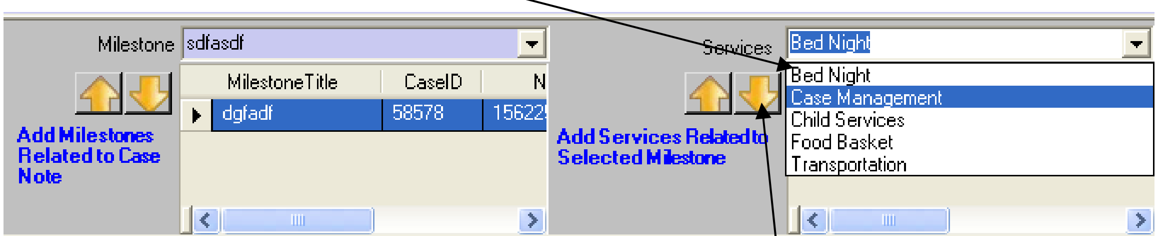
To attach another Milestone to the current Case Note, simply repeat steps 1 thru 3 again. Next, you can attach a Service to the Milestone.

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.



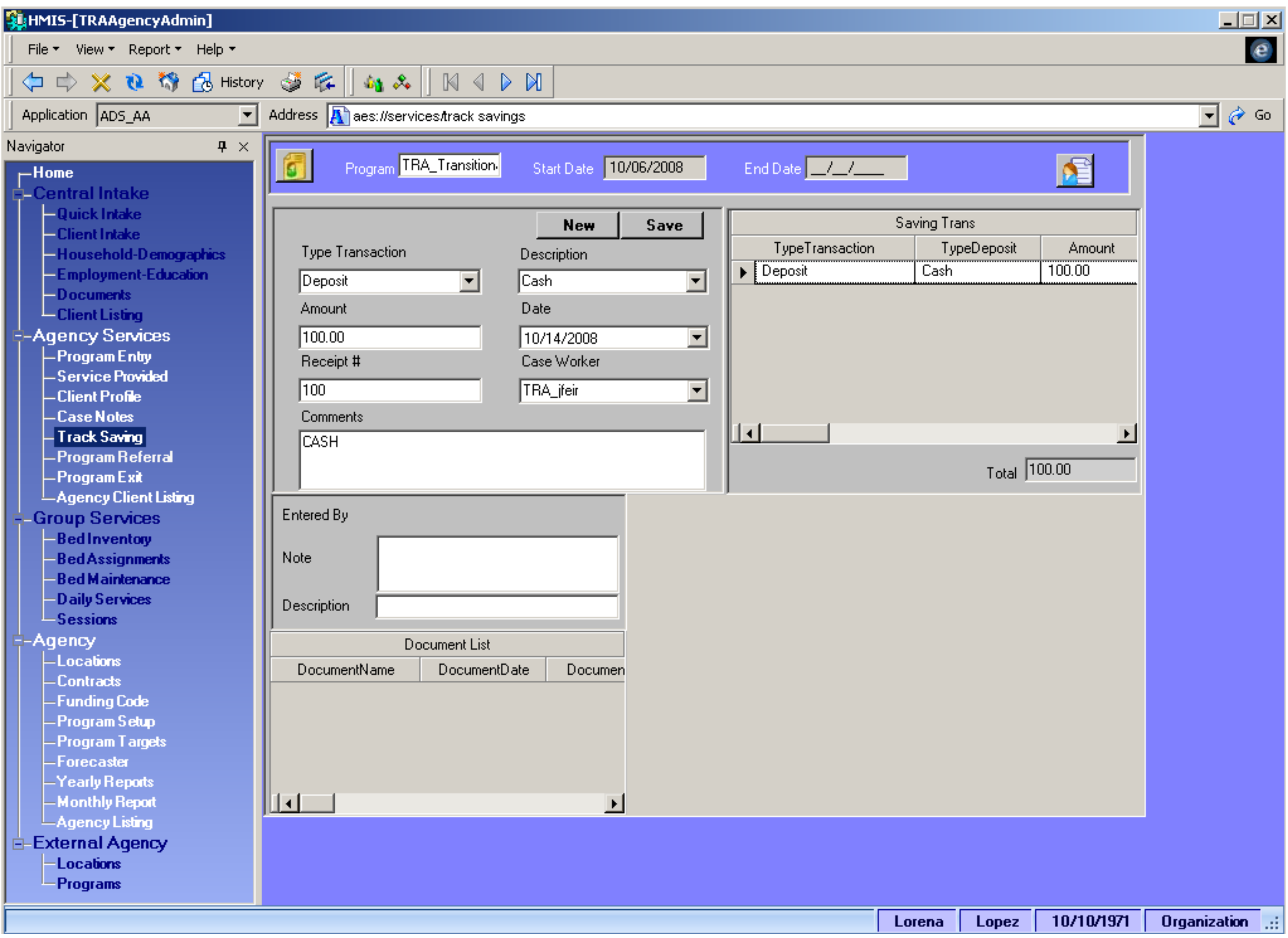
3. After choosing a Service, click on the yellow down arrow to attach the Service to the selected Milestone.
4. Click **Save**.

*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.

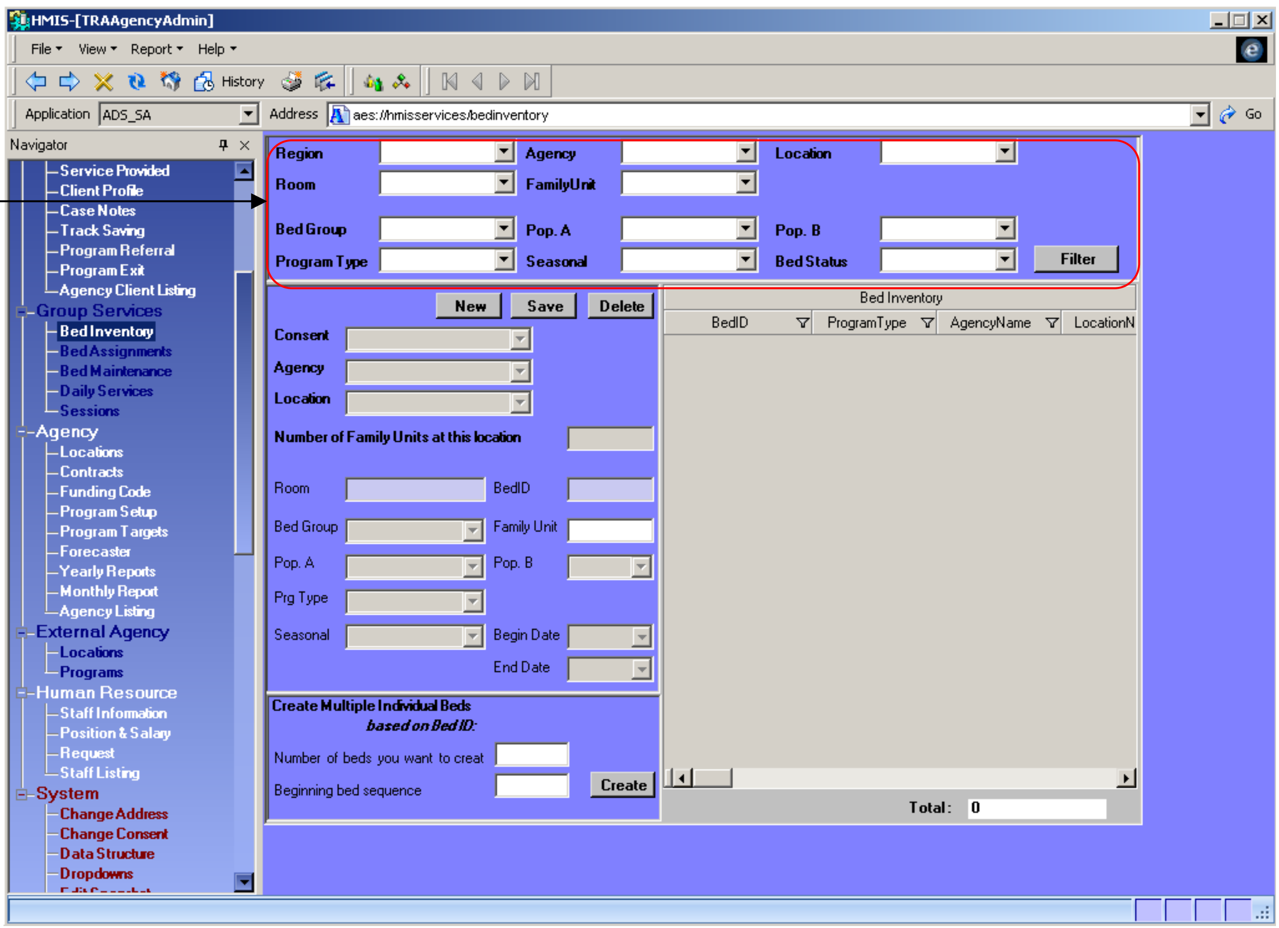


Bed Inventory Screen

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.

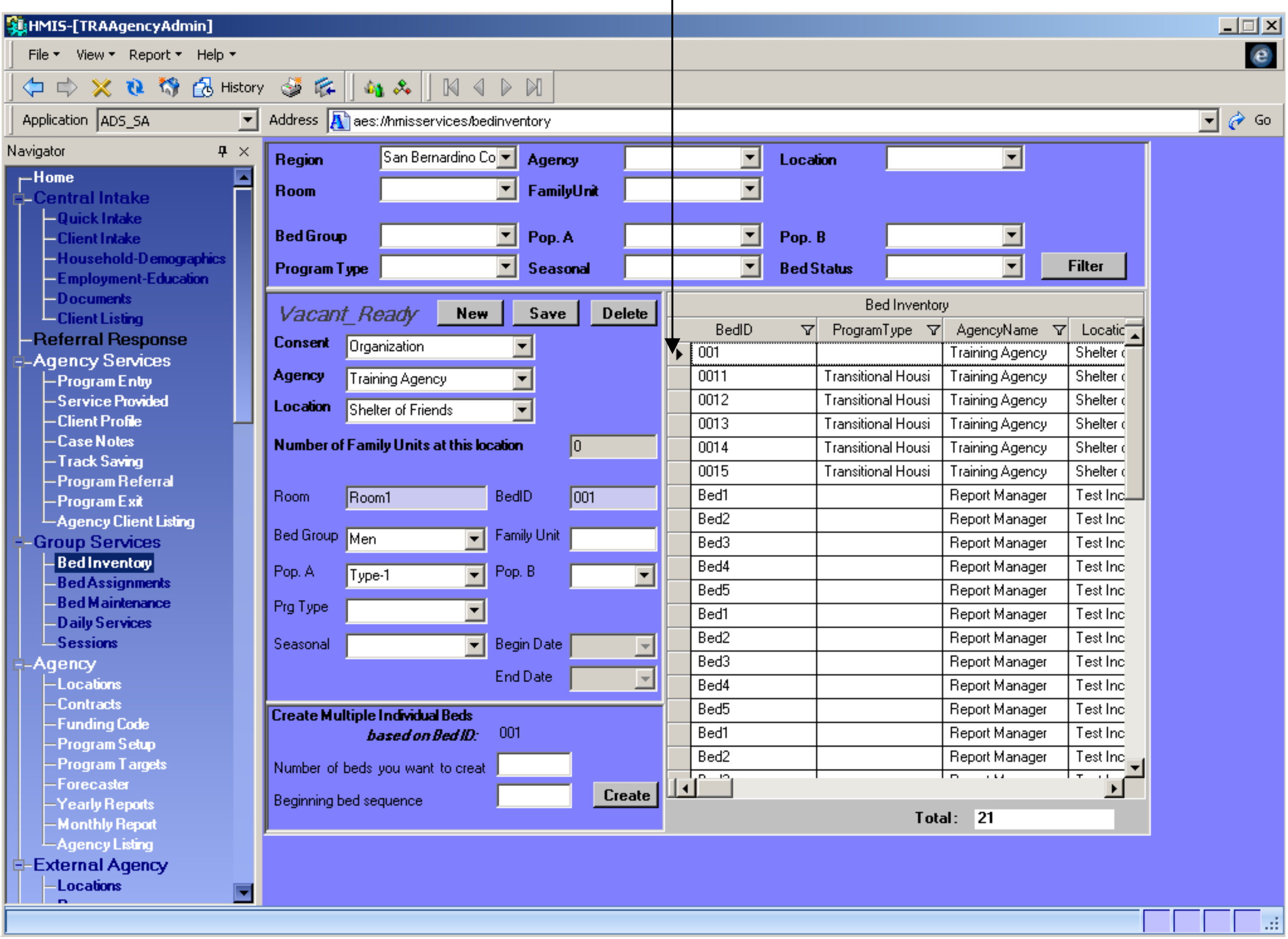


Searching for Beds

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.

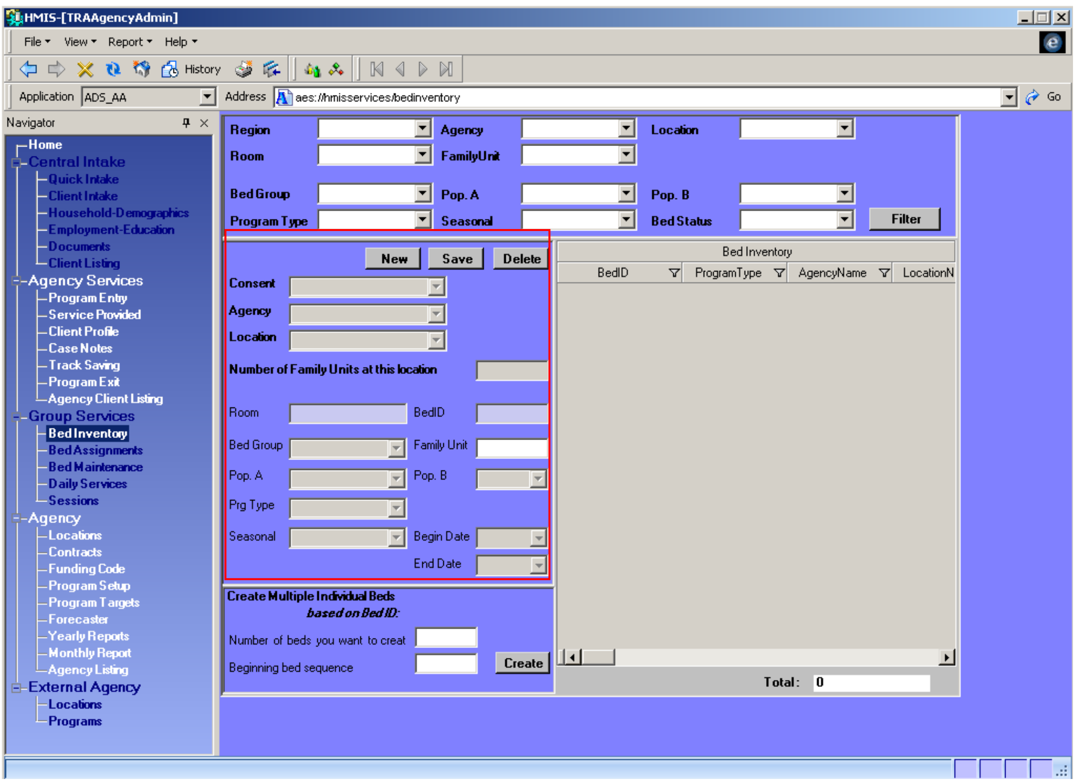


Searching for Beds (continued)

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:

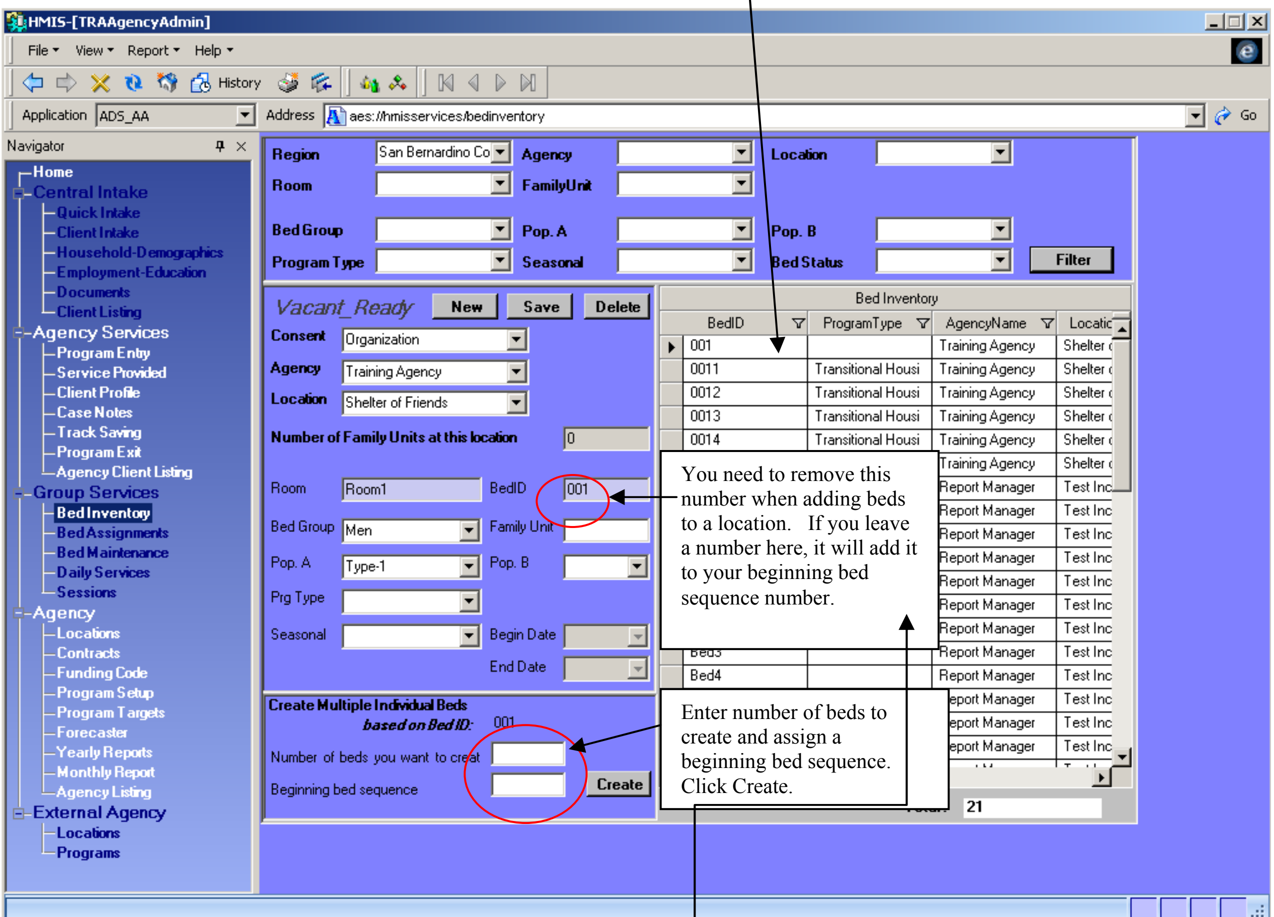


1. Click on **New**.
2. Select the **Consent** Level; always choose "**Organization**" unless you want other agencies viewing your beds.
3. Select **Agency**.
4. Select **Location**.
5. Enter **Room** name.
6. Enter **Bed ID**.
7. Enter or Select **Bed Group**
8. Enter or Select **Target Population A**. 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.



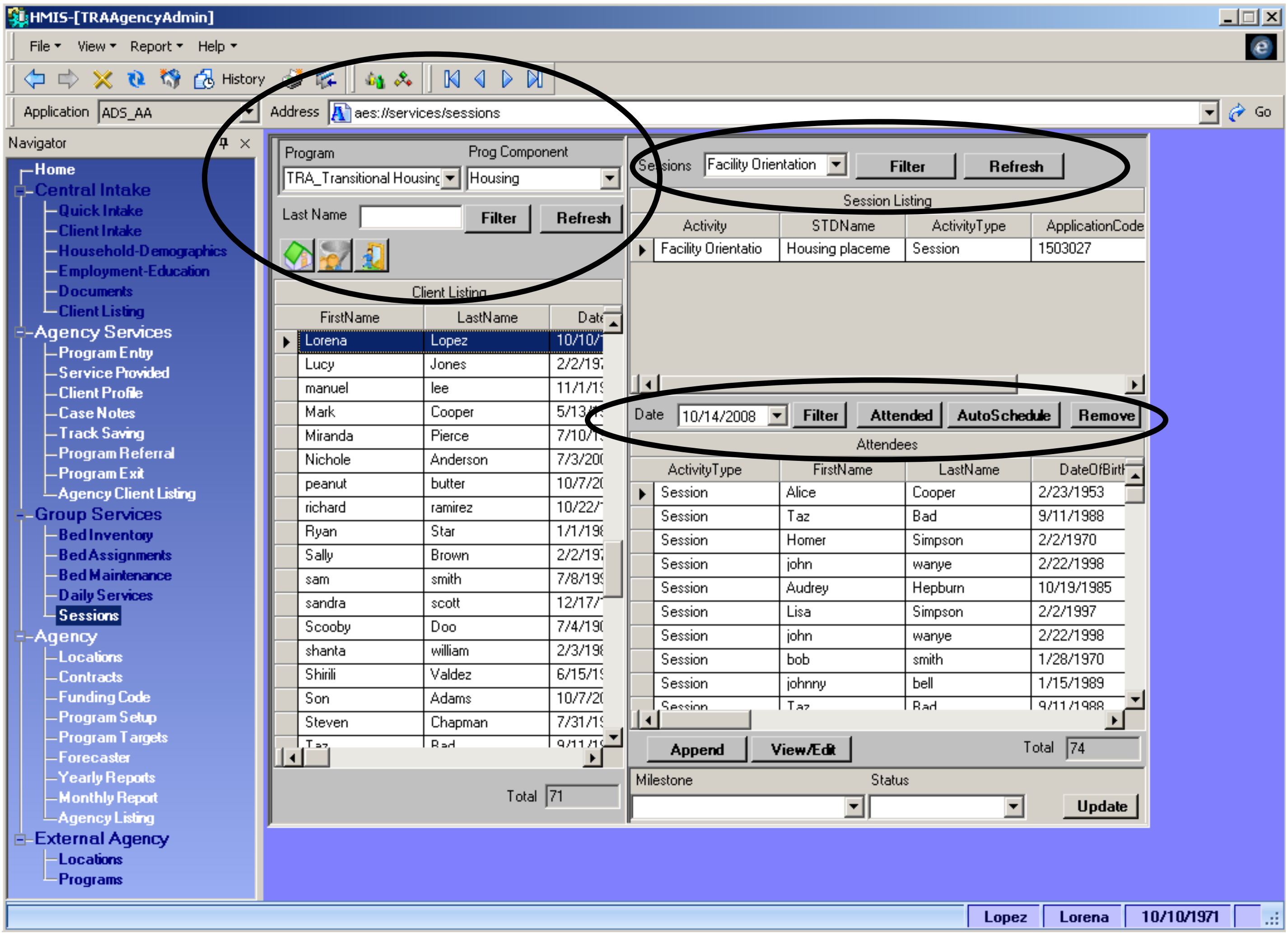
2. Enter the **Number of Beds You Want to Create**.
3. Enter the **Beginning Bed Sequence**. Only numbers are allowed. If your first bed was named Bed 1, enter a 2 here.
4. Delete the number showing in the **Bed ID** field.
5. Click the **Create** button.

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

Bed Inventory

BedID	ProgramType	AgencyName	Locatic
1	Transitional Housi	Training Agency	Shelter (
2	Transitional Housi	Training Agency	Shelter (
3	Transitional Housi	Training Agency	Shelter (
4	Transitional Housi	Training Agency	Shelter (
5	Transitional Housi	Training Agency	Shelter (

Sessions



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.

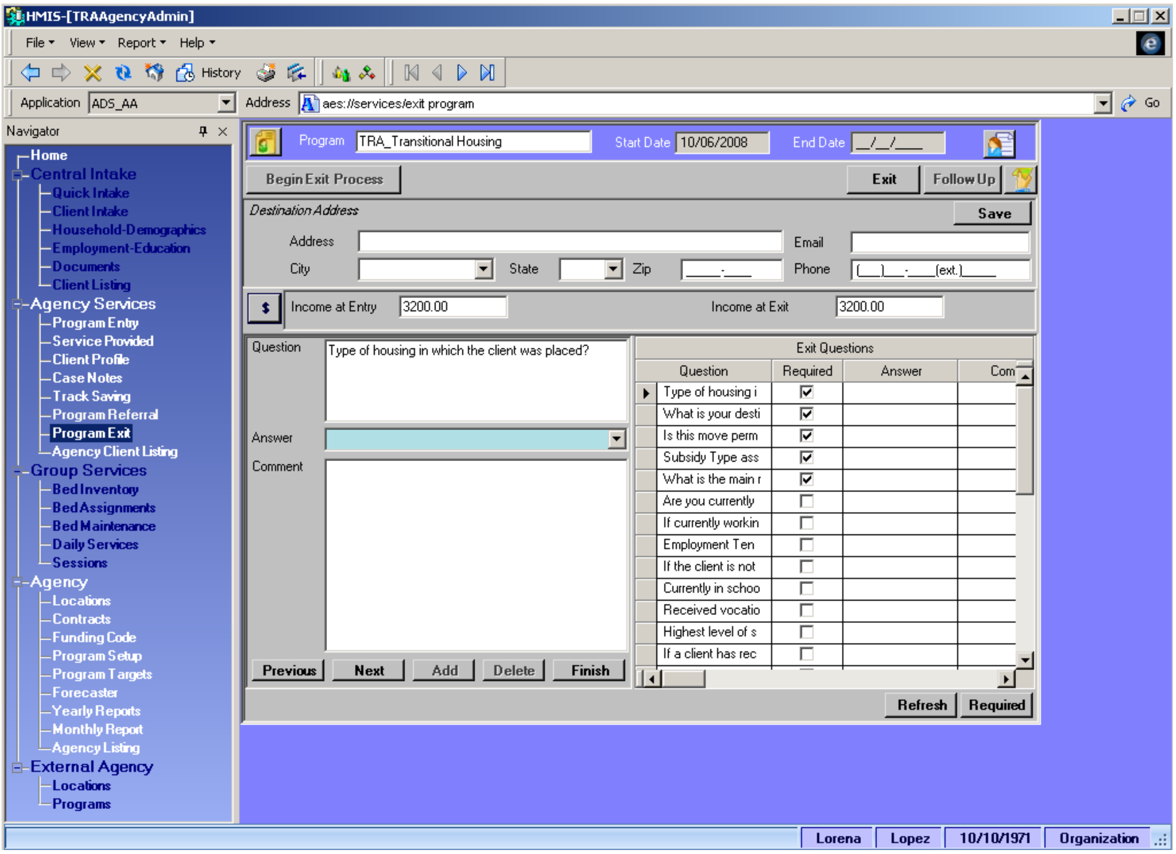
3. **Client Profile.** If your agency has a pre, post-test or other special questions, they will be on this screen. Be sure the answers have been entered.

4. **Case Notes:** Make sure all case notes from everyone in your agency have been entered.

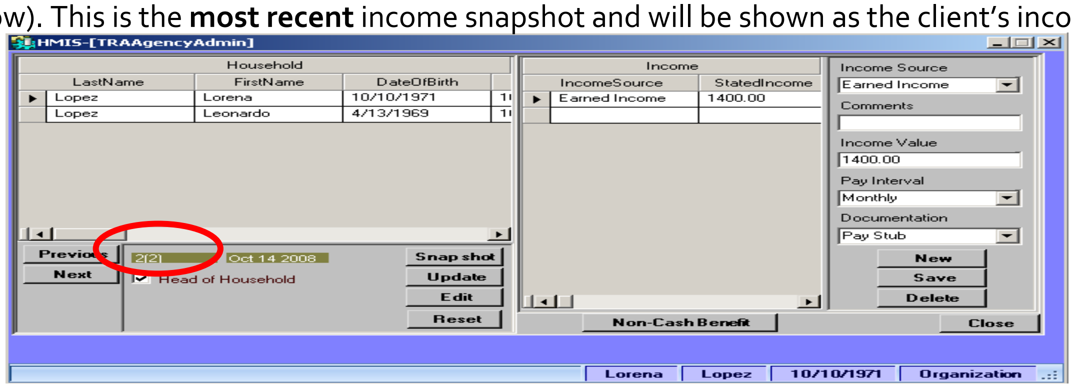
5. **Track Saving:** Make sure all information is up-to-date.

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



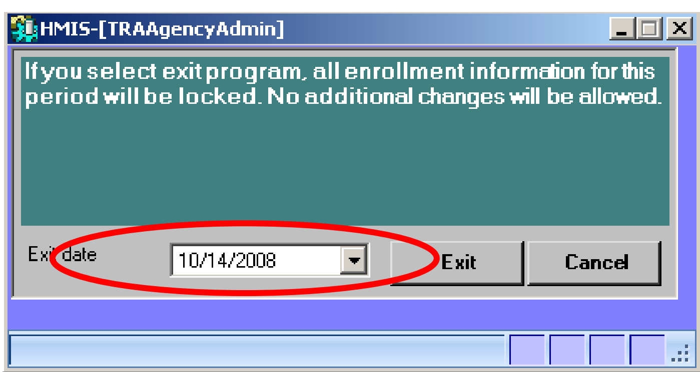
1. Click on **Begin Exit Process.** This will generate the exit questions.
2. If known, enter the "Destination Address" (address where client is going to live when they leave the program) and click on **Save.** If you only know the city, state, and/or zip, enter that information.
3. **Income at Entry/Exit:** 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**	• Search for the client. • Select the client's record and click on the **Jump to Program Entry** shortcut button.
2	**Client Intake**	• Complete all required (blue) fields and click on **Save**. ✓ **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**	• 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	• Make sure the correct person's name appears at the bottom of the screen and complete ALL the remaining blue fields. **NOTE**: ✓ 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	**NOTE: The Income section must be completed for every Head of Household, even if the client has no income.** ✓ 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.**

		✓ 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**.
	Household Demographics: Household Members	• 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.**
	Program Entry: ***Enrollment Information***	• 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.**
	Program Entry: ***Household Income** and **Prior Living Situation***	• Verify that the income shown is the correct "income at entry." To make changes: ✓ 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**.
	Service Provided ***Generate***	• 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	their record, and return to the **Service Provided** screen. • Select **Consent** (Organization), **Prog Component,** and **Staff** and click on **Generate.**
	Service Provided ***Milestone Status***	• **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:** ✓ **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***	• Select the first milestone with a status. If you/your agency provided any activities (services) that helped the client achieve that milestone: ✓ 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	Use this screen to search for clients who have been enrolled in your program (Program Entry screen). • You must use at least one search field. Entering less information will usually get better results. ✓ To find a client who is **currently enrolled**, select **Yes** in the **Active field.** To find a client who has been **exited** from your program, select **No** in the **Active** field.

Additional Screens Checklist

1	**Client Profile**	• 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**	• 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**	**NOTE:** This screen is to be used only if you physically collect and hold a client's money. • 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: ✓ 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**	This screen is used to view your region's bed inventory as well as add and delete beds. • 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**	• 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**	• 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)

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. (Adsystech 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.