HMIS Introductory Training

The HMIS Introductory Series is the basic course every HMIS user is required to participate in to gain access to the ServicePoint system. This covers the essentials, such as login, searching for clients and entering client data and information.

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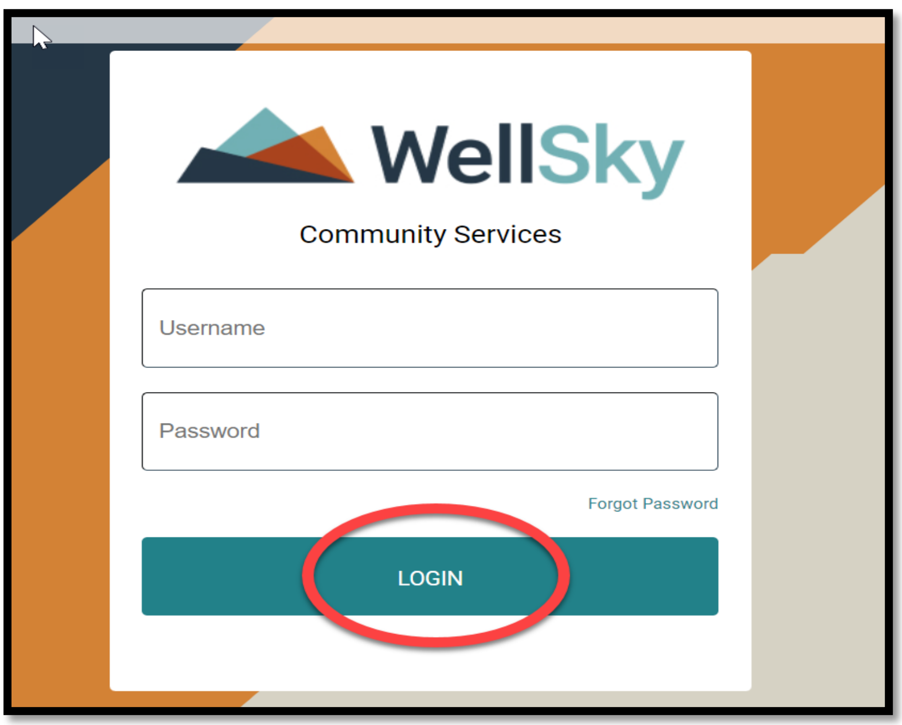
Login Basics

1) Open a web browser on your computer. You may use Google Chrome, Mozilla Firefox, Internet Explorer, or Apple Safari if you use a MAC computer. We recommend Google Chrome, though ServicePoint will work on any of those browsers listed above.

2) Navigate to your HMIS ServicePoint online portal.

3) Ensure you are on the correct login page as pictured below. Enter the relevant credentials.
   - **User Name:** Use the user name given to you by HMIS support.
   - **Password:** Use the temporary password given to you by HMIS support. Once you enter the password you will be ***immediately*** prompted to create a new password. Passwords will expire every 45 days for security purposes. Passwords must:
     - Be at least 8 characters long
     - Contain at least 2 numbers or symbols

4) Click the "Login" button (circled below). A pop up will appear asking you to accept the license agreement, click "Accept". You will then be directed to the ServicePoint website.



Overview of ServicePoint Banner

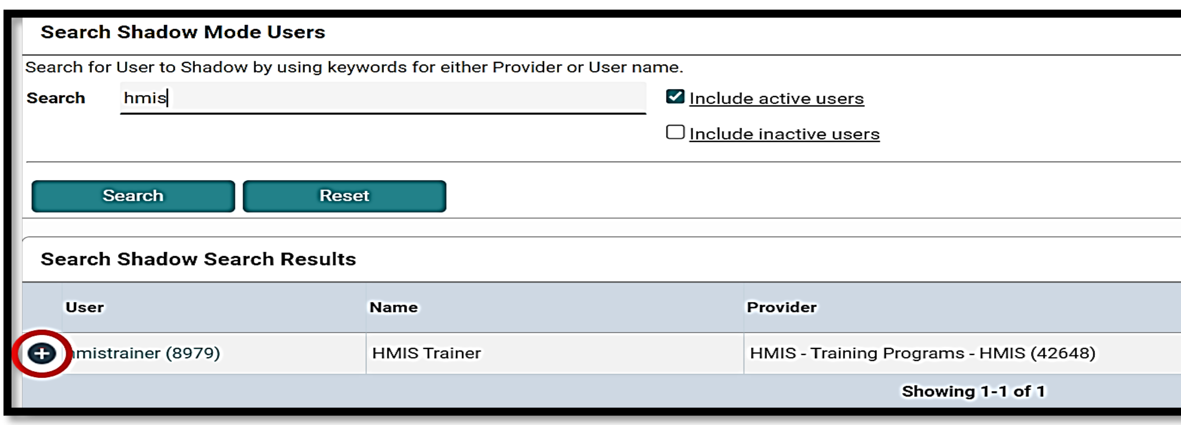
Your homepage will look similar to the image below. See the corresponding numbers from the picture below to learn more about that ServicePoint feature.

1) **Agency/Project Name:** This is where your user account is hosted.

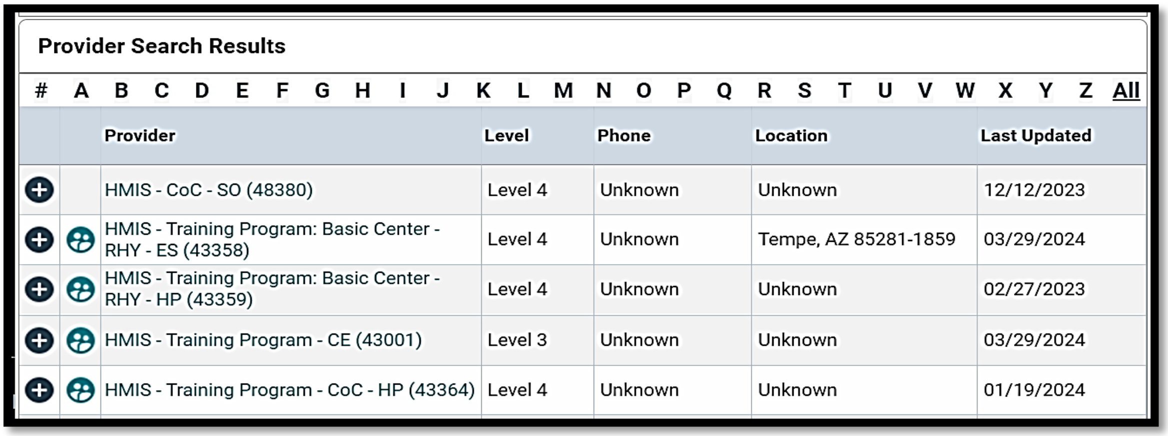
2) **Date:** Displays the current date.

3) **Your Name and Access Level:** The access level is normally Case Manager III or Agency Admin.

4) **Shadow Mode:** Users with an Agency Admin level access may shadow users at their agency only. This is NOT a remote access feature – this feature simply allows the Agency Admin to view a user's setup. Click on "Shadow" and search for the user when prompted. Click the plus sign to shadow an account (circled below). When you are done, click the user's name next to the "Shadow" link to exit shadow mode.



5) **Enter Data As:** Users that need to access more than one project/grant within an agency will use this link to navigate to multiple projects/grants. Click on "Enter Data As" and select the appropriate project/grant by clicking on the plus sign next to the project/grant's name. When you are done, click that project/grant name next to the "Enter Data As" link to return to original settings.



Provider Search Results

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

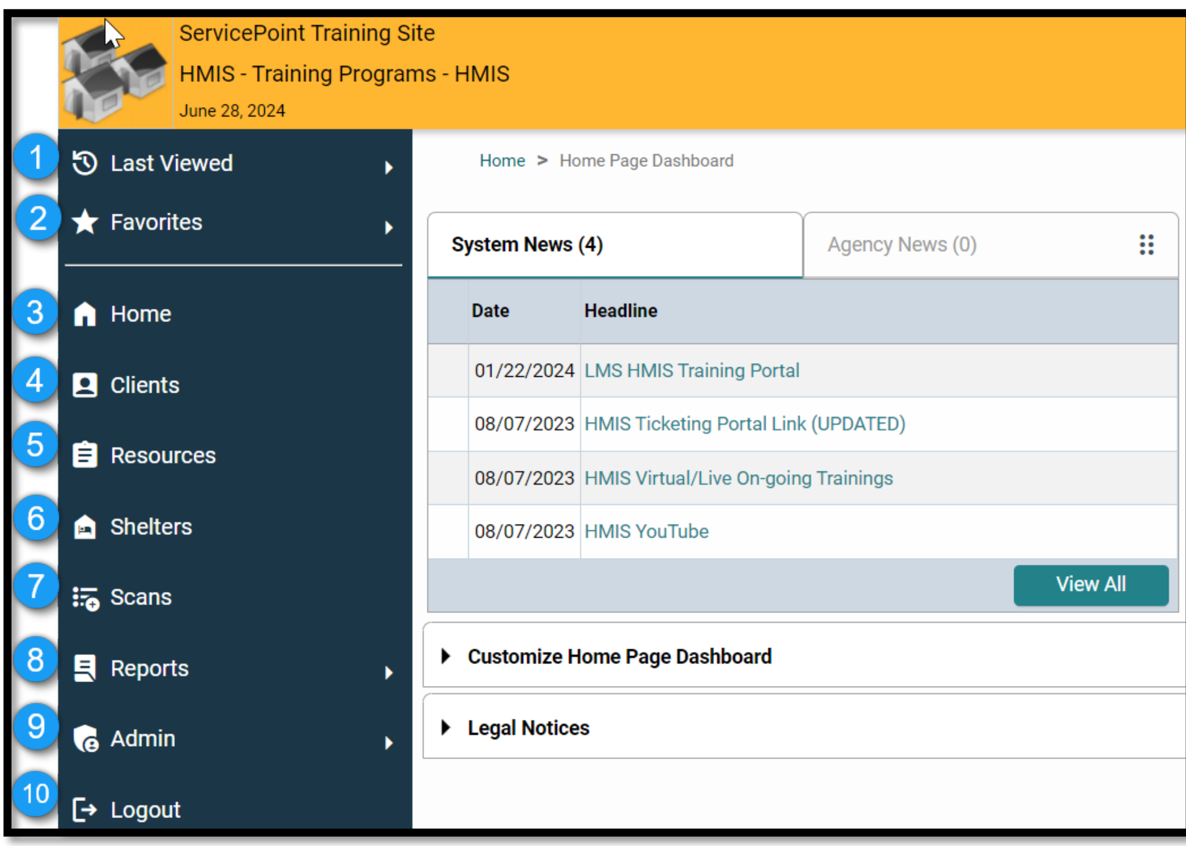
Provider	Level	Phone	Location	Last Updated
HMIS - CoC - SO (48380)	Level 4	Unknown	Unknown	12/12/2023
HMIS - Training Program: Basic Center - RHY - ES (43358)	Level 4	Unknown	Tempe, AZ 85281-1859	03/29/2024
HMIS - Training Program: Basic Center - RHY - HP (43359)	Level 4	Unknown	Unknown	02/27/2023
HMIS - Training Program - CE (43001)	Level 3	Unknown	Unknown	03/29/2024
HMIS - Training Program - CoC - HP (43364)	Level 4	Unknown	Unknown	01/19/2024

6) **Bell Icon:** This is an alert for new items in your System or Agency News Section.

7) **Question Mark:** This is a help feature within ServicePoint. Click it to be directed to help folders. Please note these are general help topics and not specific to your agency.

Overview of ServicePoint Modules (menu bar)

Menu Bar (Modules): See corresponding number from the picture below to learn more about that ServicePoint Feature.



1) **Last Viewed:** The last 10 client records viewed, during the current HMIS episode, will display here for a quick way to navigate back to client records. Click on client name in list to open the client record without having to search for them again. The “Last Viewed” list clears every time you logout for security purposes.

2) **Favorites:** Users have the ability to create a favorite list of clients for fast navigation to certain clients on their case load, or client records that need to be accessed frequently. Though technically this list can be as long as you want, only the top 10 will have an active link to the actual client record. To add a client to your favorites list, be on that client record (any tab) and then click the gold star in the upper right hand corner (in between the question and exclamation marks). Use the “Edit Favorites” link to change the order of your favorites list, or delete exited clients from your list.

3) **Home:** The Home button returns you to the home page. The home page is the location of System and Agency News. System News is distributed by the HMIS Support Team, it contains information about how to contact us for assistance, upcoming training, forms and system outages. Agency News can be information distributed by your specific agency that only other users at your agency can view. (rarely used) The Follow Up window is utilized by case managers, and explained in the Case Management training.

4) **Clients:** This is where the user searches for existing clients in the HMIS system or creates a new client who is accessing homeless services for the first time.

5) **Resources:** This is the Community Information and Referral Services resource directory. It is a search engine containing thousands of referral services for the state of Arizona. This information can also be accessed by calling “211” in Arizona, or at our website: http://www.211arizona.org/ This will be explained more in the Case Management training..

6) **Shelters:** This is where, if applicable, your agency tracks which bed list and/or unit your client(s) are occupying. This will be explained more in the HMIS ShelterPoint training.

7) **Scans:** This is where services can be recorded for multiple clients at once. This will be explained more in the Case Management training.

8) **Reports:** This is where canned reports, created by Welsky , can be accessed, ran and downloaded. Users with a BusinessObjects licenses can also access the SAP Business Objects reporting application. Reporting is explained more in our live Advanced ServicePoint and Report training.

9) **Admin:** Users with an Agency Admin level only can access several features here, such as User Admin (for resetting passwords) and Provider Admin. Please contact the Helpdesk for further information.

10) **Logout:** Users click this to logout of HMIS when they are done working in the system. Please be sure to logout, or lock your screen, whenever leaving your work area, no matter how short a time, for security purposes.
    - Note: ServicePoint will automatically log you out after sitting idle for 30 minutes. Please save your work regularly as it will not automatically save when you time out of your session.

Initial Client Entry into HMIS (ServicePoint)

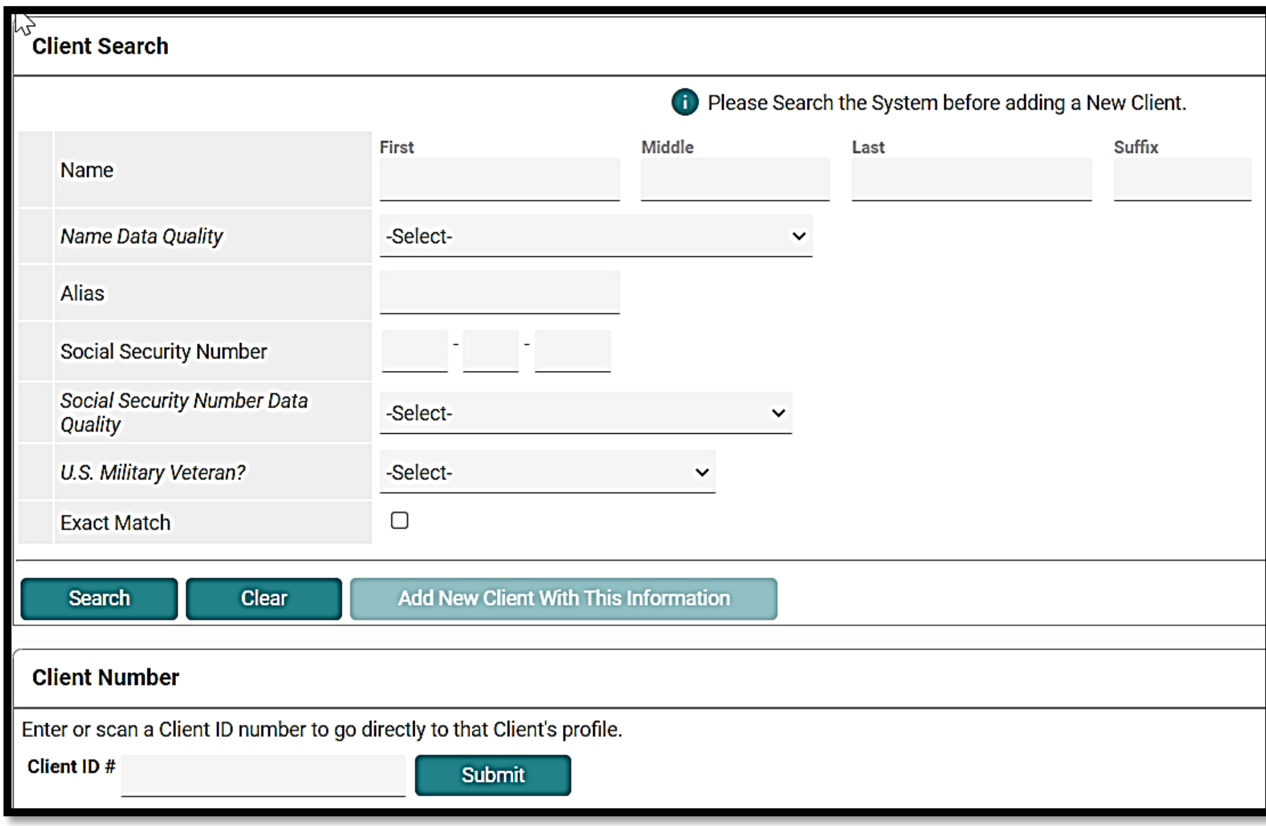
This section will cover the basics of entering a client into HMIS. This section will also provide a broad overview of the screen and options a user may see.

Creating and Searching for a Client in HMIS

This section covers the basics of searching for, or creating, a client. If you are working with a family, search for or create the head of household's record first. For families, the head of household is normally the person who qualifies the family for the project. If the household has both adults and minors, it should always be an adult.

1) Get into "Enter Data As" mode

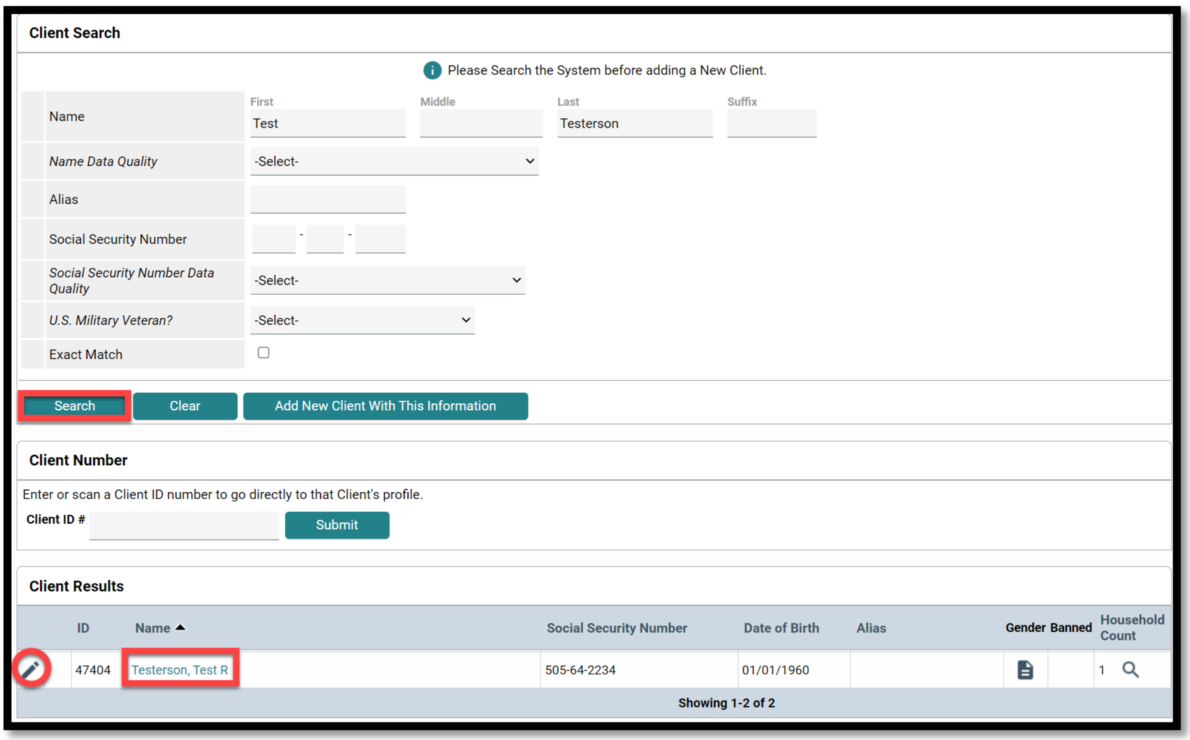
2) Click on the "Client" tab.
    a. The screen will change. Refer to the picture below for next steps.



3) Enter the search criteria, as outlined below.
    - **Name:** First and last name are required.
        - The following projects have additional guidance. Please refer to the relevant addendum.
            - SSVF
            - RHY
    - **Name Data Quality:** This dropdown describes the data quality of the name.
    - **Alias:** Section to place an alternate or second name.
    - **Social Security Number:** Only enter the digits known. Do not use placeholders for empty spaces.
        - The following project has additional guidance. Please refer to the relevant addendum.

- SSVF
- **SSN Data Quality:** This dropdown describes the data quality of the SSN.
  - Please note, a person without a SSN would have "Client Doesn't Know" selected.
- **U.S. Military Veteran:** Select the appropriate option from the dropdown.
  - The following projects have additional guidance. Please refer to the relevant addendum.
    - SSVF
    - RHY
- **Exact Match:** Do NOT use.

4) Click "Search" once all criteria have been completed.
    a. The screen will expand. Refer to the picture below for next steps.



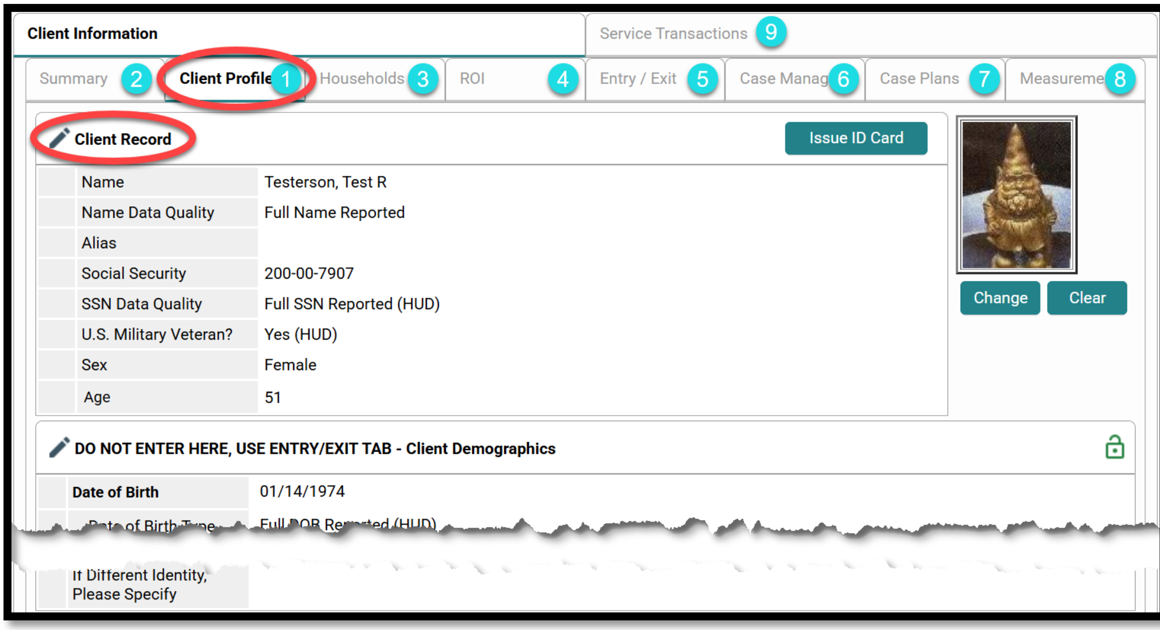
5) If your client populates under the "Client Results" section, you may select the client in one of two ways. Both methods will take you to the "Client Profile" tab, as outlined in the next section.
    a. Click on the edit pencil to the left of the client name (circle above).
    b. Click on their name (square above).

6) If your client does not populate, click the "Add New Client with this Information" button. This will create a new client record and take you to the "Client Profile" tab, as outlined in the next section.

7) If you are working with a family, do not continue to create each household member in this fashion. Please refer to the **Households Managing or Creation** section for further guidance.

Overview of the Client Record Screen

After selecting or creating a client, the HMIS Client Record will open. The record will open on the "Client Profile" tab by default. Use the picture below to reference the various options and tabs. Please note that you may not see every option depending on your agency's preferences.



1) **Client Profile:** The default screen whenever you access a client record. There are various parts to this screen.
    a. **Client Record** (circled): The following client information can only be added or edited here, by clicking on the pencil icon. You may also add a picture by clicking the "Change" button on the right.
        - Client's Name
        - Social Security Number
        - Veteran Status
        - Sex
    b. **DO NOT ENTER HERE, USE ENTRY/EXIT TAB – Client Demographics**: DO NOT use this section to input data. This is for viewing data only.
    c. For additional functions and sections, please refer to your agency or the Case Management training.

2) **Summary:** This tab provides an overall summary of the client, pulling data from all the other tabs.

3) **Households:** This is used to create and maintain households, or groups that may be entered into projects together.

4) **ROI**: This is where the ROI is entered for a client. For Balance of State users, this step is mandatory.

5) **Entry/Exit:** This is where the bulk of your client data is entered. This includes entering your client(s) into your project, updating their record, and exiting client(s) from your project.

6) **Case Managers:** This is where specific case managers can be assigned to a client electronically. Further guidance is provided in Case Management training.

7) **Case Plans:** This is where goals can be set and case notes can be added (if you agency uses this option) to the client record. Further guidance is provided in Case Management training.

8) **Measurements:** This tab is not seen by all users. It is generally where the SPDAT and/or the F-SPDAT are located for data entry. You can learn more about this feature in the Case Management 204 training class.

9) **Service Transactions:** This is where all referrals and services can be recorded, and the history of such viewed, along with client's shelter stays. You can learn more about these features in the Case Management training.

Household Managing or Creation

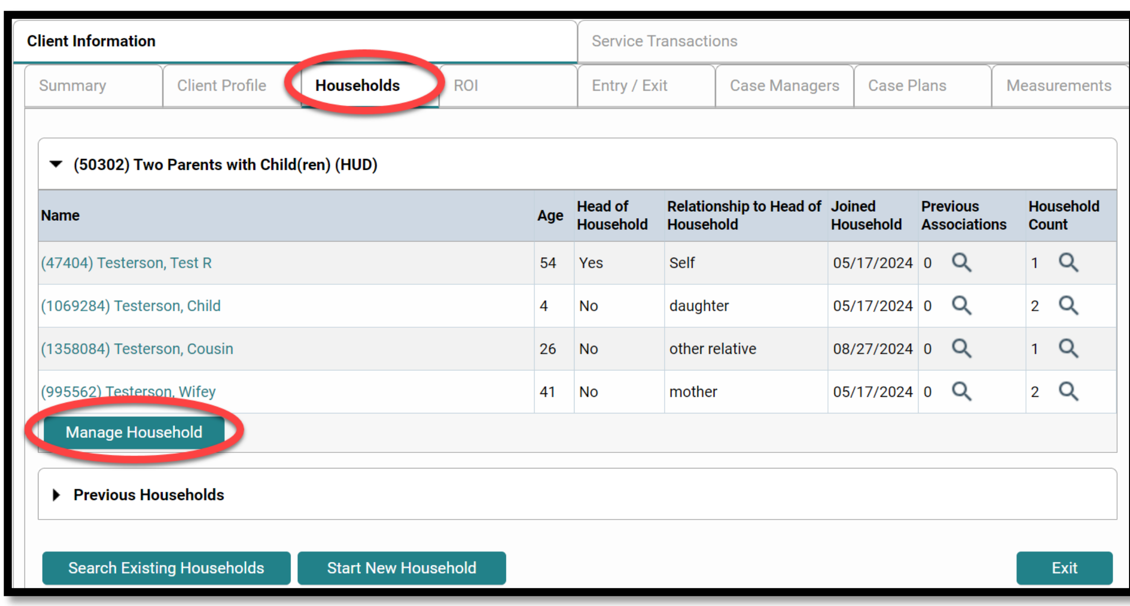
By HUD's definition, a household is group of individuals who are seeking services together. This does not have to be a nuclear family.

Please Note: Clients on the household tab display current and previous associations and does not necessarily reflect that all of the clients listed on the tab will enter the program together. You may select which clients are actually entering the program together on the Entry/Exit tab.

From the Head of Household's record, click on the "Households" tab. Please refer to the picture below for next steps.

If the Head of Household already has a household established

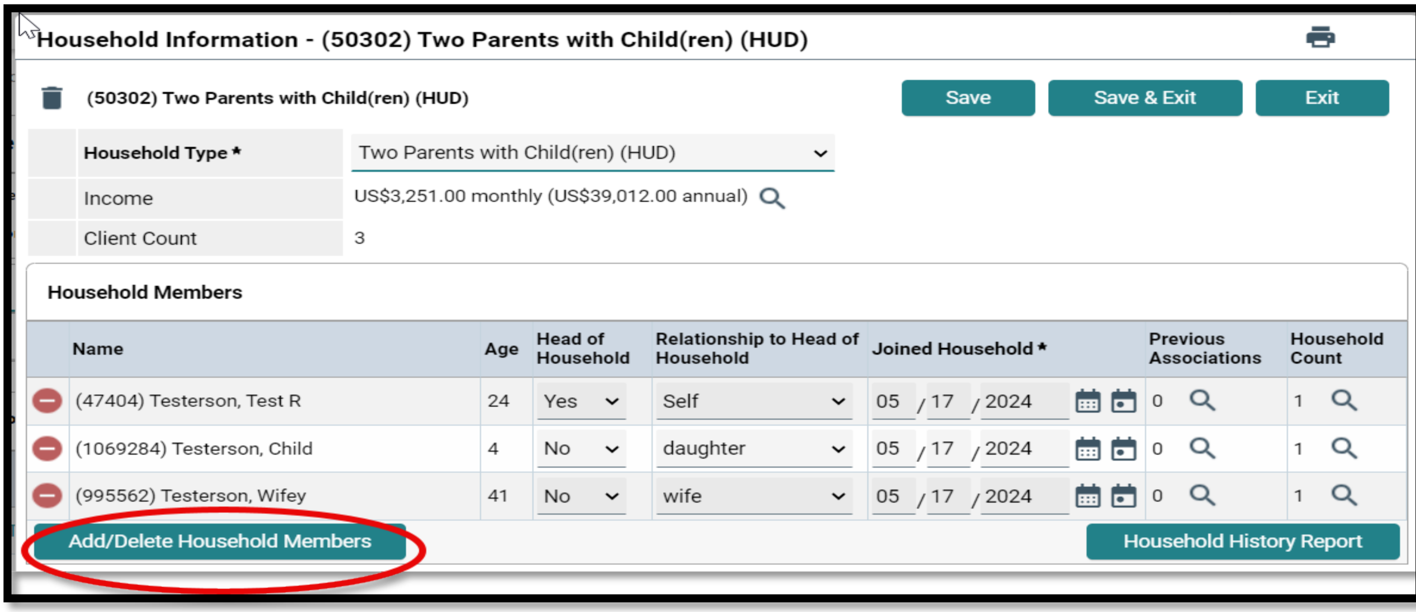
1) DO NOT create another one. If the household is missing a member, or if the "relationships" are in error, click the "Manage Household" button (circled below).
   a. A pop-up will appear. Refer to the picture below for next steps.



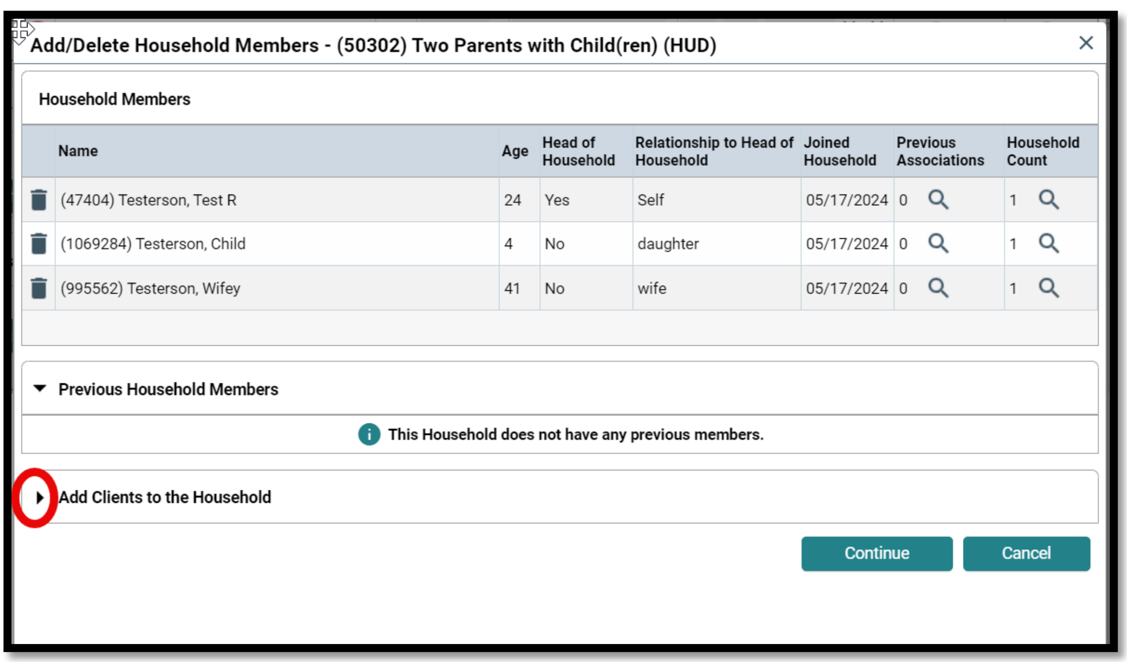
2) Check the existing data to ensure it is accurate.
   a. **Household Type:** Ensure the correct household type is reflected in the associated dropdown.
   b. **Head of Household:** There may be only 1 (one) Head of Household. For families, the head of household is normally the person who qualifies the family for the project. If the household has both adults and minors, it should always be an adult.

c. **Relationship to Head of Household:** Ensure the proper option is selected for each person's dropdown.
d. **Joined Household:** This is the date the members were added to the household in HMIS.

3) In order to add household members click on the "Add/Delete Household Members" button (circled below).
   a. DO NOT delete household members. This will negatively impact data.
   b. A pop-up will appear. Please refer to the picture below for next steps.

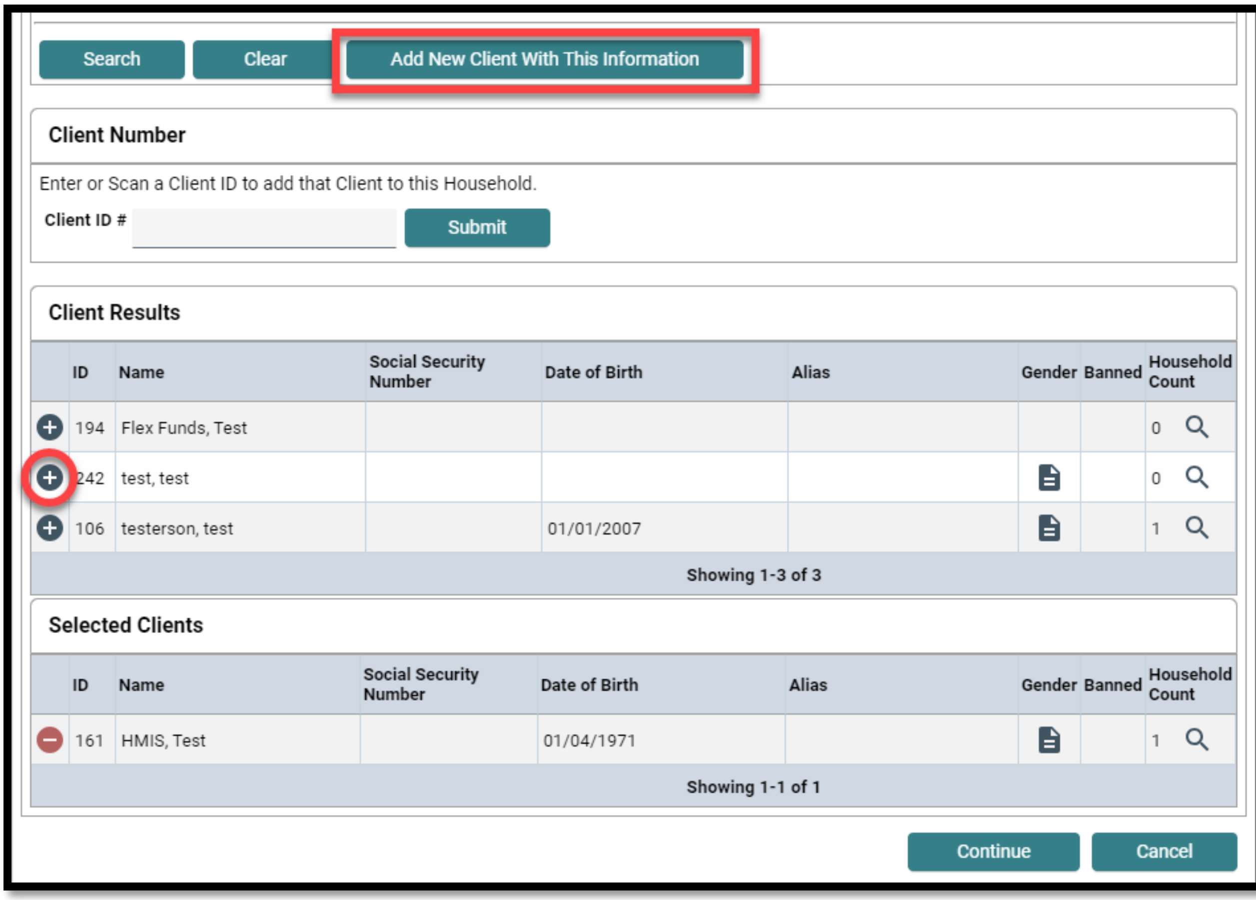


4) Expand the "Add Clients to the Household" section by clicking the black arrow (circled below).
   a. The screen will expand. Refer to the below picture for next steps.



5) Enter the appropriate search information and click "Search".

6) There are two ways to add a client to the household after the search is complete.
    a. If the client was already in the system, they will appear under **Client Results**. Click on the plus sign next to the client's name (circled blow).
    b. If the client is NOT already in the system, click the "Add New Client With This Information" button (square below).



7) For either of the above methods, the new household member's name will appear under the **Selected Clients** section.

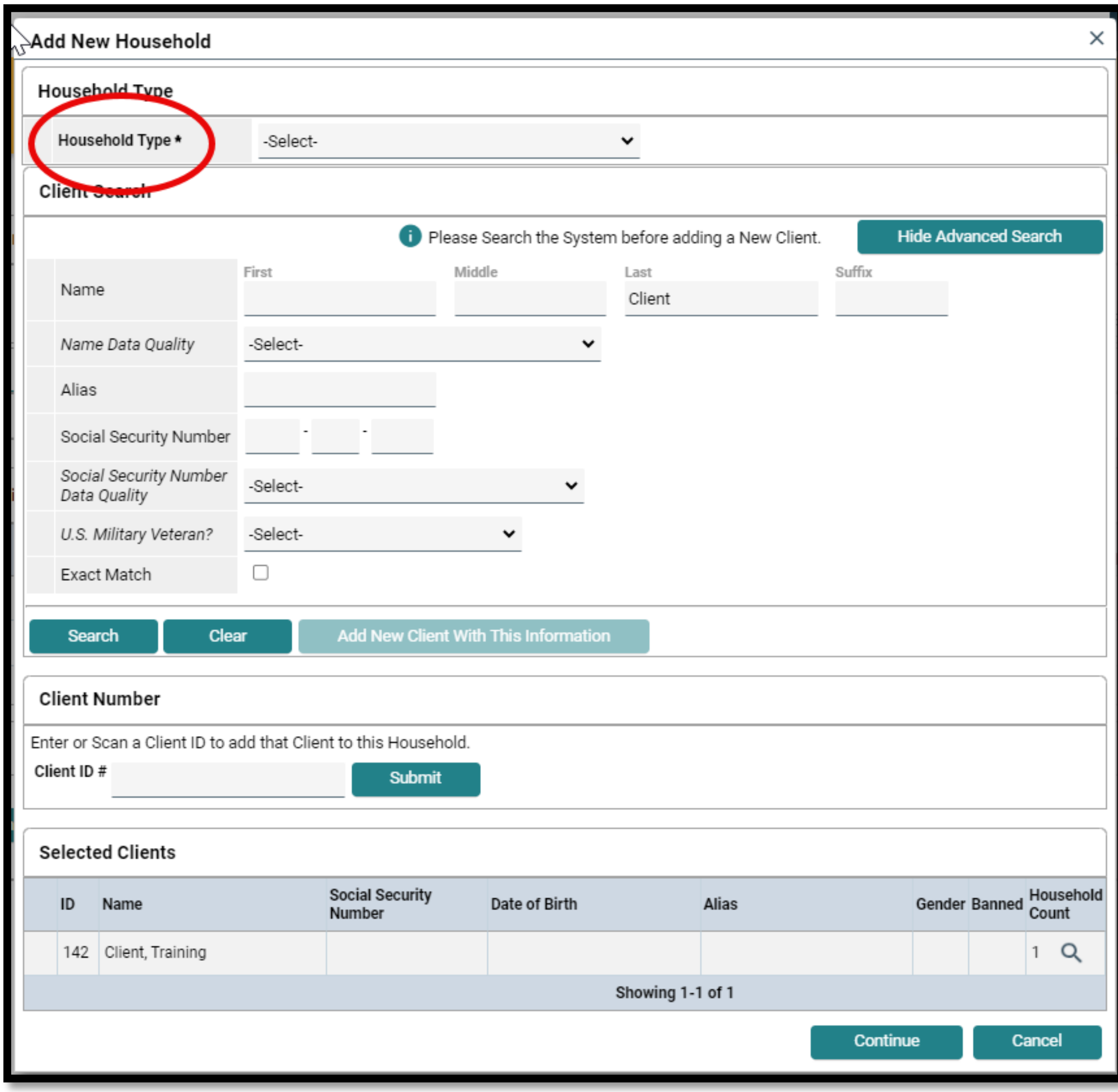
8) Continue adding clients as outlined in steps 5-7 until the household is complete. Click the "Continue" button.

9) Refer to step 2 in this section to update the **Household Type**, **Head of Household**, **Relationship to Head of Household**, and **Joined Household** fields.

10) Click "Save & Exit".

If the Head of Household does NOT have an Established Household

1) After navigating to the **Households** tab, click on the “Start New Household” button.
    a. A pop-up will appear. Please refer to the picture below for next steps.



2) Choose the “Household Type” from the drop down list (circled above).

3) Enter the appropriate search information and click “Search”.

4) There are two ways to add a client to the household after the search is complete.
    a. If the client was already in the system, they will appear under **Client Results**. Click on the plus sign next to the client’s name.
    b. If the client is NOT already in the system, click the “Add New Client With This Information” button.

5) For either of the above methods, the new household member’s name will appear under the **Selected Clients** section.

6) Continue adding clients as outlined in steps 3-5 until the household is complete. Click the "Continue" button.

7) Update the following data fields.
   a. **Household Type:** Ensure the correct household type is reflected in the associated dropdown.
   b. **Head of Household:** There may be only one (1) Head of Household. For families, the head of household is normally the person who qualifies the family for the project. If the household has both adults and minors, it should always be an adult.
   c. **Relationship to Head of Household:** Select the proper option for each household member. The Head of Household will be listed as 'self'.

8) Click "Save & Exit". You will be returned to the main **Households** tab.

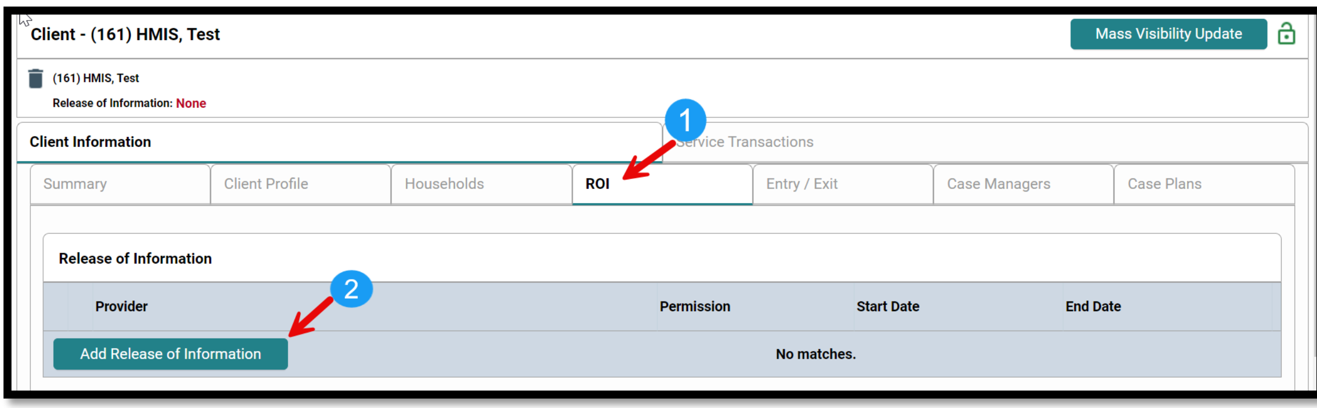
ROI

The ROI tab is used to document client ROIs. This will make it easier to quickly check a client's ROI status.

- **Please Note:** This step is mandatory for Balance of State users.

1. Click on the "ROI" Tab

2. Click on "Add Release of Information"



3. A dialog box opens allowing you to input the fact that an ROI was obtained. This must be filled out regardless of a YES or NO reply. Either reply must be recorded!

4. If the client is already associated with a Household in HMIS, the ROI dialogue box will recognize it. Check each Household member that has the same reply as the Head of Household. If other adult(s) have a different reply (YES/NO), they should be recorded separately by pulling up that person's HMIS record recording it there.

5. Select the project that is providing services to the Client/Household

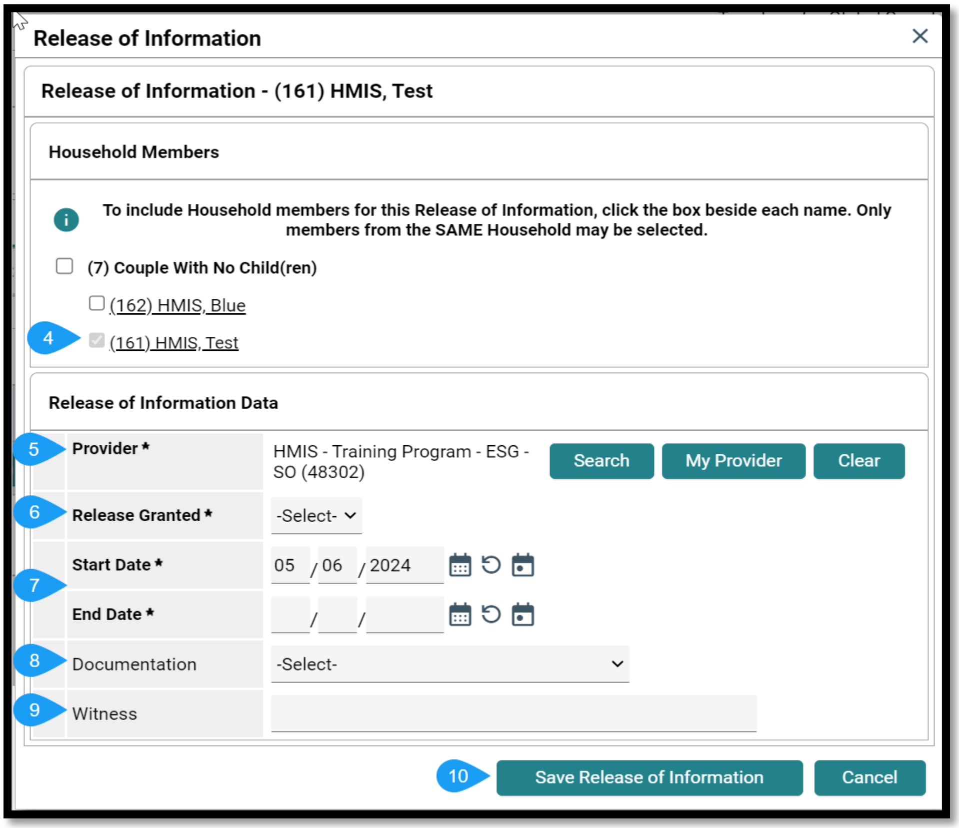
6. Mark if the Client/Household replied YES/NO

   a. *Maricopa ONLY: If a Client/Household marked "NO", contact the Help Desk and ask us to restrict/lock visibility because they would not agree to share when presented with the Release of Information.*

7. The “Start Date” is the day that the ROI was obtained (either YES or NO).
    a. For Maricopa, the End date should be 01/01/2099. This is because there is no expiration for their consent unless they change it with a future ROI.
    b. For Balance of State, the End Date should be a year from the Start Date. Balance of State ROI’s expires after a year, then must be updated for active clients.

8. Select “Signed Statement From Client”

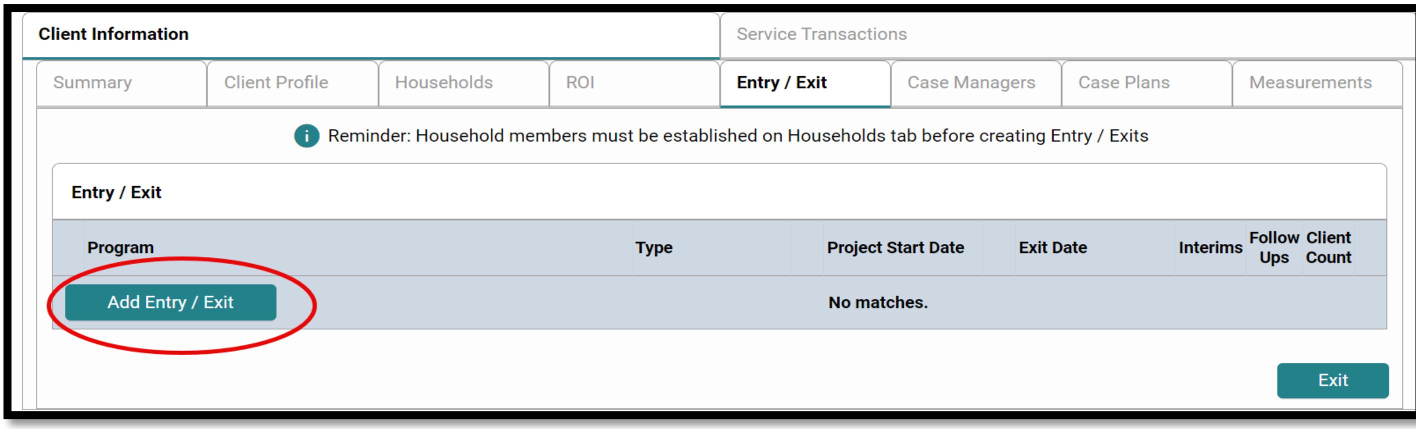
9. Record the name of the person who obtained the ROI (either YES or NO).



10. Click “Save Release of Information”. The ROI dialogue box will disappear, and you’ll be returned to the list of ROIs gathered for the client.

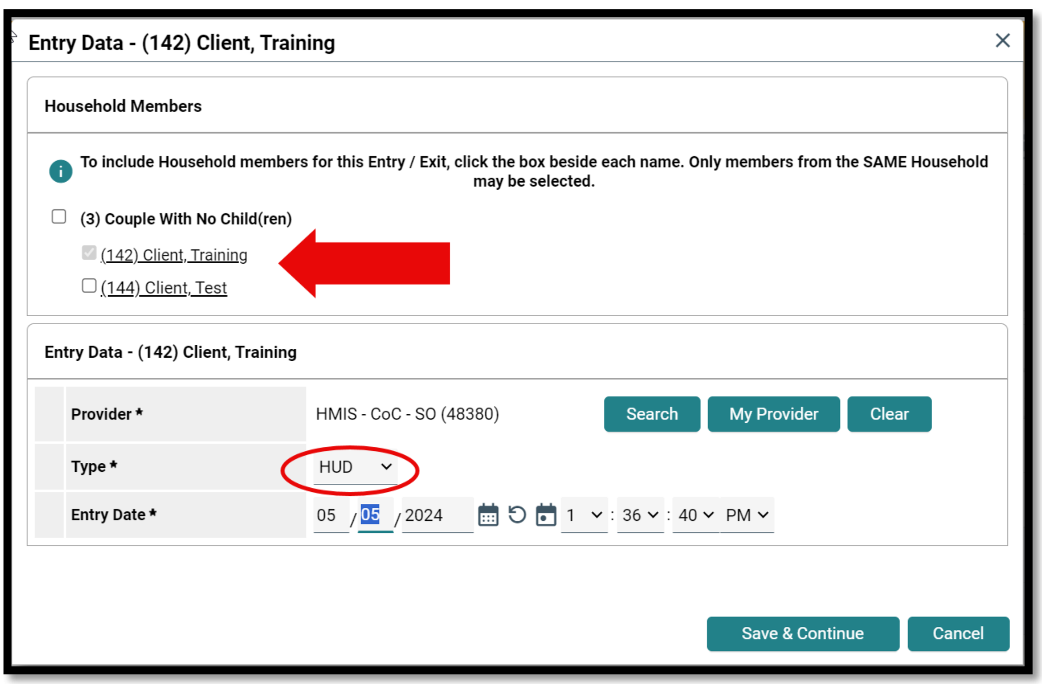
Project Entry Creation and Universal Assessment Completion

This section will cover entering a client into HMIS. If you are working with a household, you will want to select the Head of Household for the following steps. Refer to the below picture for next steps.



1) From the client's record, click the "Entry/Exit" tab.

2) Click on the "Add Entry/Exit" button on left side of screen (circled above).
   a. A pop-up will appear. Refer to the below picture for next steps.



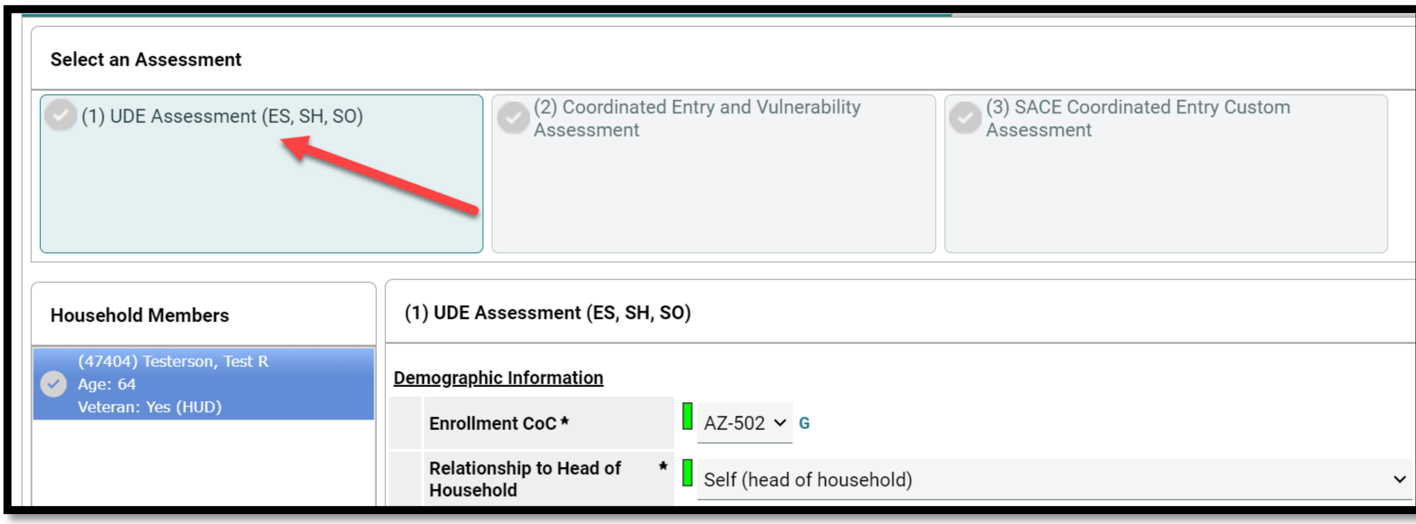
3) Using the **Household Members** area, only check mark the names of the clients who are entering your project. For singles, this area will be blank (arrowed above).

4) Ensure the "Provider" is correct. (If it is not correct then you are not in "Enter Data As" mode. Cancel entry command and get into EDA mode first.)

5) Choose the "Type" of **HUD, PATH, RHY** or **VA** as appropriate. "**HUD**" is the default selection if the others don't apply (circled above).

6) Ensure date is the actual entry date.

7) Click "Save & Continue" button.
   a. A new pop-up will appear. The UDE Assessment (with program types listed in parenthesis) will display, as pictured below.



Maricopa UDE (Universal Data Elements) Assessment Questions

The UDE Assessment will open by default for the Head of Household first. This assessment has HUD required questions, though some are optional. Below are the descriptions for each of the UDE questions.

3) **Enrollment CoC:** This field identifies a HUD defined geographic region. Select the option from the dropdown.

4) **Relationship to Head of Household:** If you work with singles, then the answer to this is always "Self (head of household)". For families, the head of household is normally the person who qualifies the family for the project. If the household has both adults and minors, it should always be an adult. There may only be one designated head of household per project enrollment.
   a. The following projects have additional guidance. Please refer to the relevant addendum.
      - SSVF
      - RHY

5) **Date of Birth:** Enter the client's reported date of birth using a 4 digit year. If the client cannot give you a date of birth, ask their age and approximate the date of birth year and use 01/01 for the month and day.
   a. The following projects have additional guidance. Please refer to the relevant addendum.
      - SSVF
      - RHY

6) **Date of Birth Type:** Specify whether a full, partial, or other date of birth quality was provided. If a client does not know their date of birth to within one year, select “Client Doesn’t Know”.

7) **Race and Ethnicity:** Record the self-identified race(s) and ethnicity of each client served. Help the client select as many race and/or ethnicity options that they identify with. This element also includes an open text box field for clients to report any additional race or ethnicity information they wish to share. If the client does not know their race or ethnicity, or prefers not to disclose it, use "Client doesn't know" or "Client prefers not to answer", rather than making an appearance or name-based assumption.

8) **Gender:** Record the self-reported gender of each client served. When enrolling a client who already has a record in the HMIS, verify that gender information is complete and accurately reflects how the client identifies, and correct if it does not. Gender identity is a person’s internal perception of themselves and may not match the sex they were assigned at birth. This element records one’s gender identity and not sex assigned at birth. Staff observations should never be used to collect information on gender. Provide all options to every client. Every client must be asked for their self-reported information.
    a. If they prefer not to provide it or say they don't know, do not make a selection other than “Client doesn’t know” or “Client prefers not to answer” on the client’s behalf. Simply asking, “Which of these genders best describes how you identify?” is appropriate and focuses on the person's own internal knowledge of their gender.
    b. Be mindful of a client’s wishes when they disclose having a culturally specific identity (e.g., Two-Spirit), transgender, non-binary, questioning, or a different identity. The availability of these options is not intended to indicate a requirement that individuals are expected to disclose their status; each response is provided as an option in case an option (or more than one option) is better suited to a client’s identity, needs, or situation. Nonetheless, if a client identifies as a transgender man - but they do not want their transgender identity recorded in the HMIS - the staff person would select “Man (Boy, if child)” instead of both “Man (Boy, if child)” and “Transgender”.

9) **Does the client have a disabling condition:** Please select the appropriate answer from the drop-down. This data element is to be used with other information to identity whether a client meets the criteria for experiencing chronic homelessness. There is additional information about HUD’s definition of disabling condition if you hover over the question.

10) **Zip Code of Last Permanent Address:** Specify the 5 digit zip code of the last place the client was housed for at least 90 days. If the client cannot remember the exact zip code, then please hover over the question. You will see a list of default zip codes you may use for each city.

11) **Did you experience an eviction from housing in the last 12 months?** “Yes” or “No” if client has been evicted in the past year.
    a. **Please choose the type of eviction you experienced:** Drop down box with three options select most appropriate reason “Non-Payment of Rent (COVID-19 Hardship)”, “Non-Payment of Rent (Non-COVID-19 Related)”, or “Other Issue (Non-Rent)”.

12) **Homelessness Primary Reason:** Select the primary reason your client is homeless.

13) **Prior Living Situation:** Identify the type of living situation and length of stay in that situation immediately prior to project start for all adults and the Head of Household. This data element is used with other information to identify whether a client appears to meet the criteria for experiencing chronic homelessness at various points of enrollment (i.e., at the point of project entry, at a point during a project enrollment, or at any point over the course of a specified reporting period).
    a. **Length of Stay in Previous Place:** This question relates to the question above, "Prior Living Situation". You will record how long the client stayed at the prior living situation from the dropdown options.

14) **Approximate date this episode of homelessness started**: Have the client look back to the date of the last time the client had a place to sleep that was not on the streets, emergency shelter, or safe haven. Including the situation the client was in right before entering, plus any continuous time moving around between the streets, an emergency shelter, or a safe haven, determine the date this period of the client's experience of ''literal'' homelessness began. The look back time would not be broken by a stay of less than 7 consecutive nights in any permanent or temporary housing situation nor would it be broken by an institutional stay of less than 90 days (i.e., jail, substance abuse or mental health treatment facility, hospital, or other similar facility). Approximations are permitted.

15) **Regardless of where they stayed last night - Number of times the client has been on the streets, in ES, or SH in the past three years including today**: This field is asking you to count the number of times or instances of homelessness the client has experienced in the past three years. In other words, how many periods of homelessness did the client experience? Periods of homelessness will be separated by non-homeless living situations.

16) **Total number of months homeless on the Streets, in ES, or SH in the past three years**: Count the accumulated number of months the client was homeless in the past three years. If a client identifies one day as homeless in some month – and reports no other permanent living situation in that month – you may count it as one month of homelessness.

17) **Location of Prior Residence:** For the client's prior residence, choose which city or county was this located in.

18) **If covered by AHCCCS enter ID #:** Enter AHCCCS ID.

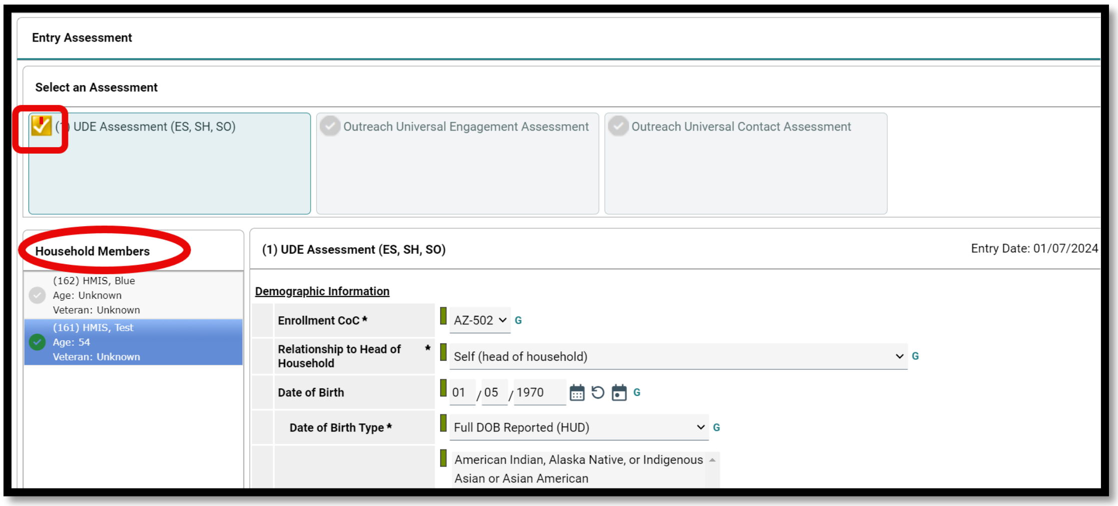
19) **Housing Move-in Date (PH and RRH Projects ONLY)**: This field is only displayed on the UDE Assessment with "(PSH, RRH, TH, SSO, and HP)" in its name. This field marks the day a client moved into an actual housing unit. This field applies to all Permanent Housing, including Rapid Re-Housing, projects. Transitional Housing, Supportive Services Only and Homelessness prevention projects do not need to complete this field. If there is already data in this field, please follow one of the two scenarios below.
    a. <u>If the client is being housed immediately</u>: Update this field to record the date they are moving into housing.
    b. <u>If the client will **NOT** be housed immediately</u>: Leave the field with the previous recorded date. This is used for reporting. When the client does move into housing, you must then update this field with the client's move-in date. This can be accomplished with an update. Refer to the **Interim Update** section for more guidance.

After completing the UDE Assessment, click “Save” on the bottom right. If you do not have additional household members **AND** you do not complete additional assessments, you may click “Save & Exit”. Please refer to your agency for guidance in this regard. In most cases you will want to review the **Program Data Elements** section below.

Completing UDE for Other Household Members

If you are serving a household, you will need to complete the UDE Assessment for additional household members. If you are serving a single, you may disregard this section.

1) Scroll up to the **Household Members** section (circled below). You will notice a green check mark next to each client you have already entered data for. Click on a client with a gray check mark to complete their data.
    a. Please note the **UDE Assessment** has a yellow check (square below). This means additional household members still need to have their assessment completed.



2) The UDE Assessment will now open for the next client. Answer the questions as described in the previous section. Move on to the next step once you have entered data for all clients in the household.

3) Once everyone’s data is complete the check marks by their names will turn green.

4) After completing the UDE Assessment for every household member, click “Save” on the bottom right. If you do not have additional household members **AND** you do not complete Program Data Elements, you may click “Save & Exit”. Please refer to your agency for guidance in this regard. In most cases you will want to review the Program Data Elements below.

5) If you need to complete the Program Data Elements, please switch back to the Head of Household’s record before proceeding.

Program Data Elements Questions: Clients Not Served Previously

Scroll back to top of page and click on the **Entry Assessment** in the **Select an Assessment** section. This assessment may have various names depending on your program type, but should typically still say "Entry Assessment" within the title. Additional questions will now appear on this second assessment. Please complete these questions.

1) **Total Monthly Income:** This is a text field used to enter the client's total monthly income. This will be a total of all the incomes the client identifies.
    a. The following project has additional guidance. Please refer to the relevant addendum.
        - SSVF

2) **Income from Any Source:** Choose "Yes" or "No" whether the client is currently receiving any form of income at entry into your project.

3) **"Monthly Income" Sub-Assessment:** Click on the "HUD Verification" link to the right of this question. You will need to answer "Yes" or "No" to every source of income on the list. If the answer is "Yes" to any you will be see a new pop-up for you to complete. Complete the information indicated below.
    a. Enter the income amount
    b. The **Start Date** will equal the day the client discloses to you their income and should match their entry date.
    c. The **End Date** should be left blank
    d. Click "Save" – you will be taken back to the main income verification screen.

    Once every response has been completed, click "Save & Exit". The HUD Verification link should have a green checkmark to let you know that this is fully completed.

4) **Non-Cash Benefit from Any Source:** Choose Yes or No whether the client is currently receiving any form of Non-Cash Benefit at entry into your project.

5) **"Non-Cash Benefits" Sub-Assessment:** Use the "HUD Verification" link on the right. Answer Yes or No to *every* source of benefit on the list. Click "Save & Exit". The HUD Verification link should have a green checkmark now.

6) **Covered by Health Insurance:** Choose Yes or No, whether the client currently has any form of Health Insurance at entry into your project.
    a. **Note:** The following programs should refer to their addendum packets for additional guidance.
        - **HOPWA**

7) **"Health Insurance" Sub-Assessment:** Use the "HUD Verification" link on the right. Answer Yes or No to *every* source of health insurance on the list. Click "Save & Exit". The HUD Verification link should have a green checkmark now.
    a. **Note:** The following programs should refer to their addendum packets for additional guidance.
        - **HOPWA**

8) **"Disabilities" Sub-Assessment:** Use the "HUD Verification" link on the right. Answer Yes or No to *every* type of disability on the list. If the answer is 'Yes' to any, fill in the additional question in the associated pop-up. Click "Save & Exit". HUD Verification link should have a green checkmark now.
   a. **Note:** The following programs should refer to their addendum packets for additional guidance.
      - **SSVF**

9) **Highest Level of Education Attained:** Choose from the drop down list the highest level of education the client has attained.

10) **Survivor of Domestic Violence:** Answer Yes or No on whether the client has ever been, or is currently, a victim of domestic violence.
   a. **Note:** The following program does not require this question.
      - **SSVF**

11) **If yes for Survivor of Domestic Violence , when experience occurred:** Indicate how long ago the most recent incident of domestic violence occurred.

12) **If yes for Survivor of Domestic Violence , are you currently fleeing?:** Indicate if the client is currently fleeing a domestic violence situation.

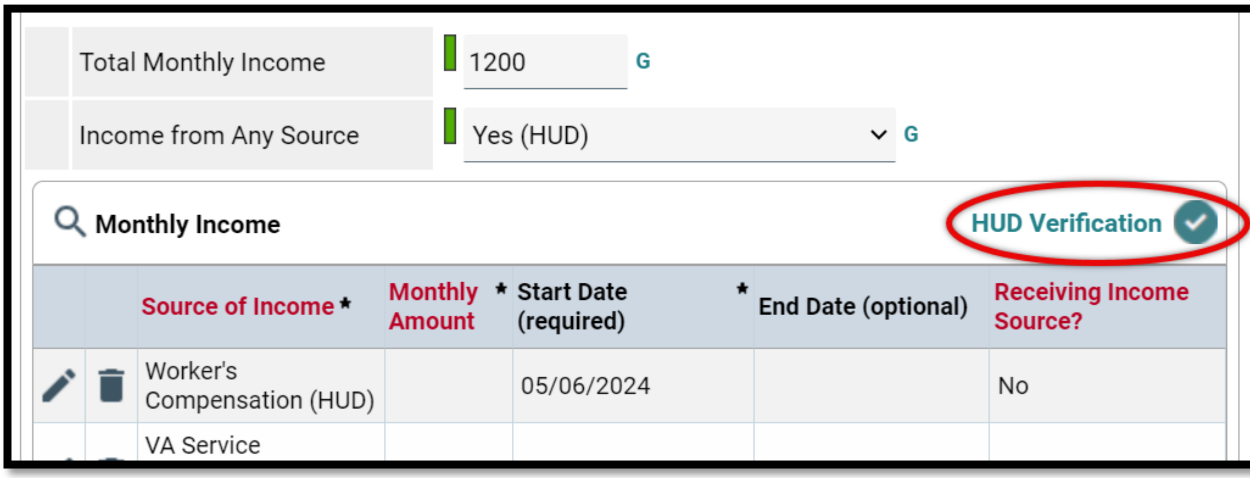
13) **Additional Program Guidelines:** Depending on your grant source and funding, you may have to complete additional program elements.
   a. **Note**: The following programs should refer to their addendum for additional program elements.
      - **HOPWA**
      - **SSVF**
      - **RHY**
      - **ESG**
      - **PATH**

After completing the Program Data Elements, click "Save" on the bottom right. If you do not have additional household members, and you have no custom assessments to complete, you may click "Save & Exit". Otherwise, continue to the **"**Completing Program Elements for Other Household Members**"** section that outlines how to complete these assessments for the remaining household members.

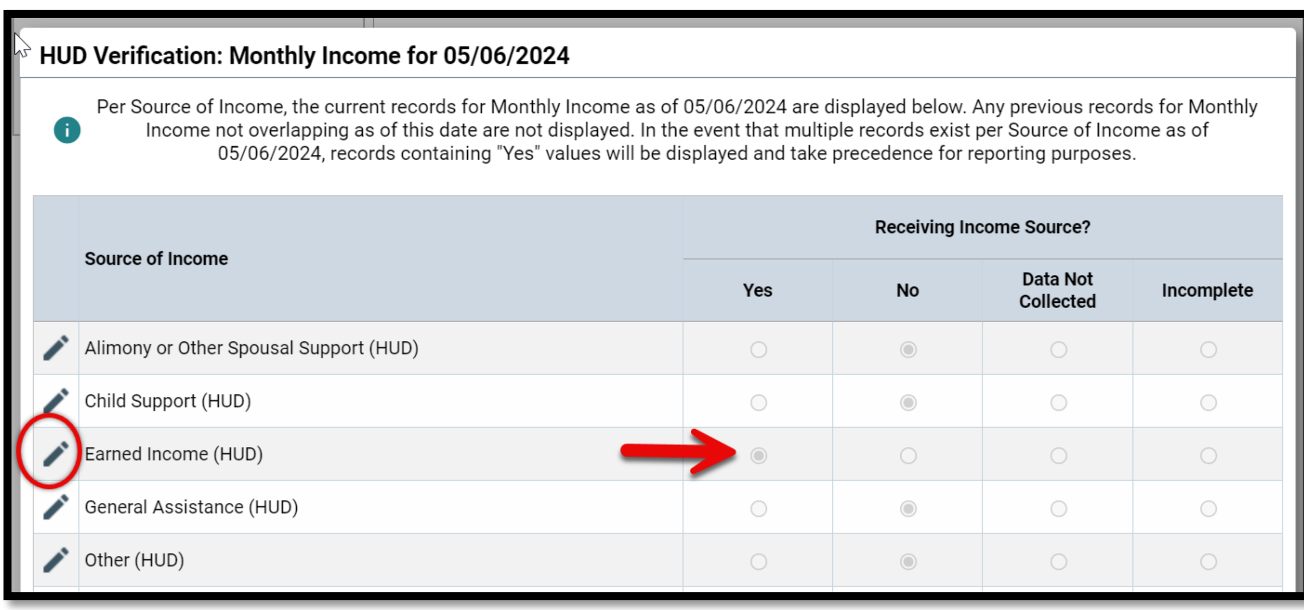
Program Data Elements Assessment: Clients Served Previously

Clients that have been served by an agency in the past and agreed to share their information may have historical information that pre-populates. The following outlines how to update any of these fields if they any of the selections and values are not current.

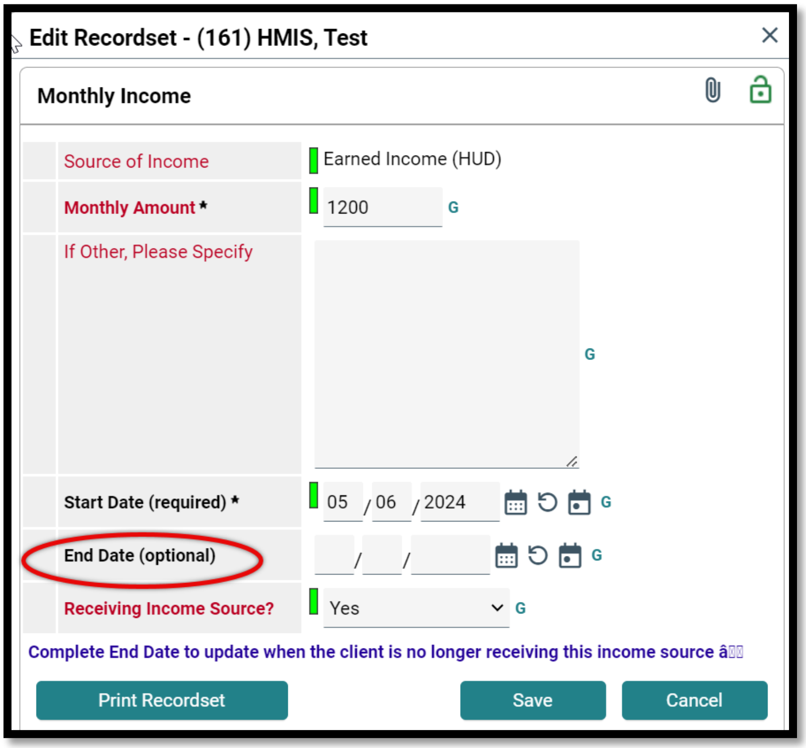
1) To verify a previously served clients information click on the associated HUD Verification link



2) Confirm client is still receiving or not receiving associated income, non-cash benefits, or insurance
   a. If there are any change in values, click the pencil icon next to the associated source



3) An “Edit Record Set” pop-up will appear. Update the pop-up accordingly. Click “Save” when complete.
   a. **End Date** – must be updated to one day before the date of the reported change
   b. **If** “Monthly Amount” is blank, you may enter a 0.
   c. <u>DO NOT UPDATE</u> any other fields for the change

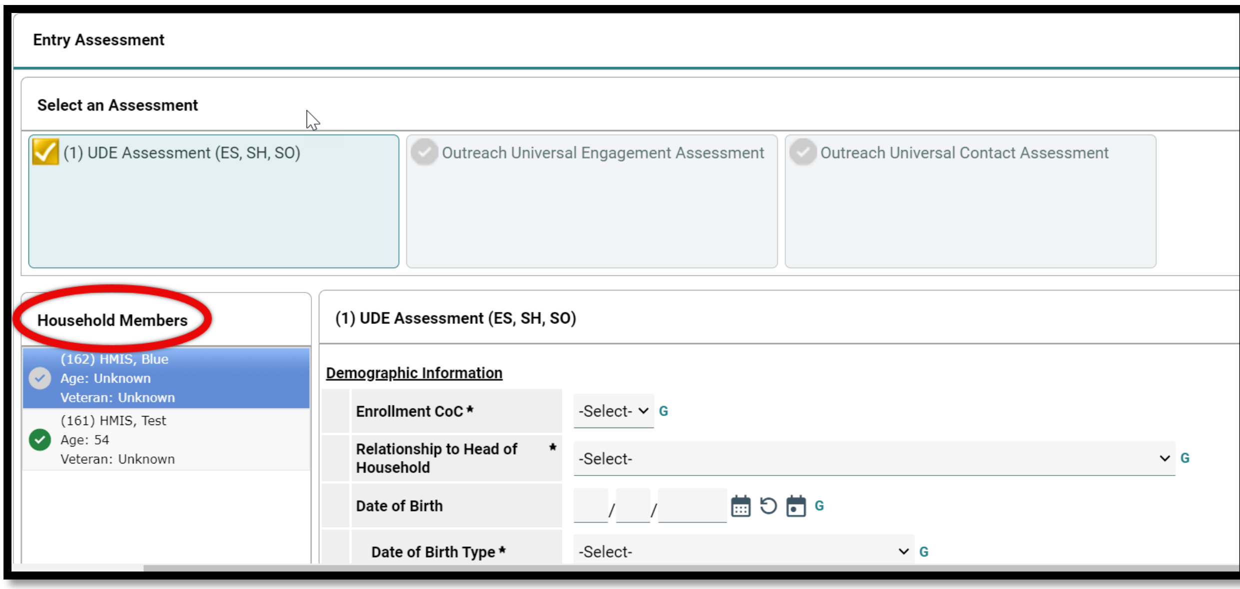


4) The HUD Verification screen will have changed to incomplete
   a. Update associated field to “No” or “Yes” as appropriate for the receiving income, non-cash benefits, or insurance sub-assessments. If you select “Yes”, complete all necessary fields on the pop-up.
      i. **** For changing a client who is not receiving income, non-cash benefits, insurance to receiving or updating amount of the same source, please see the Interim Update sections associated with the value you are changing. ****

Completing Program Elements for Other Household Members (if applicable)

If you are serving a household, you will need to complete the Program Data Elements for additional household members. If you are serving a single individual, you may disregard this section.

1) Scroll up to the **Household Members** section (circled below). You will notice a green check mark next to each client you have already entered data for. Click on a client with a gray check mark to complete their data.
    a. Please note the **Entry Assessment** has a yellow check. This means additional household members still need to have this assessment completed.



2) The **Entry Assessment** will now open for that client. Answer the questions as described in the previous section.

3) Click "Save". Select each additional household member until complete. Once all household members have been updated, move on to the next step.
    a. Once everyone's data is complete the check marks by their names will turn green.

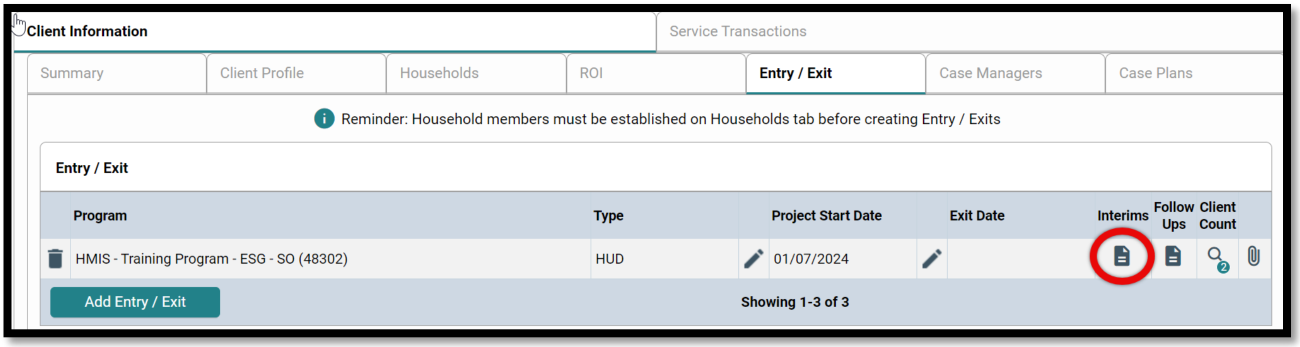
4) After completing the Entry Assessment for every household member, click "Save" on the bottom right. If you have an agency specific assessment, you would complete it at this time. Please refer to your agency for guidance in this regard. If you do not have any custom assessments to complete, you may click "Save & Exit".

How to do an Interim Update

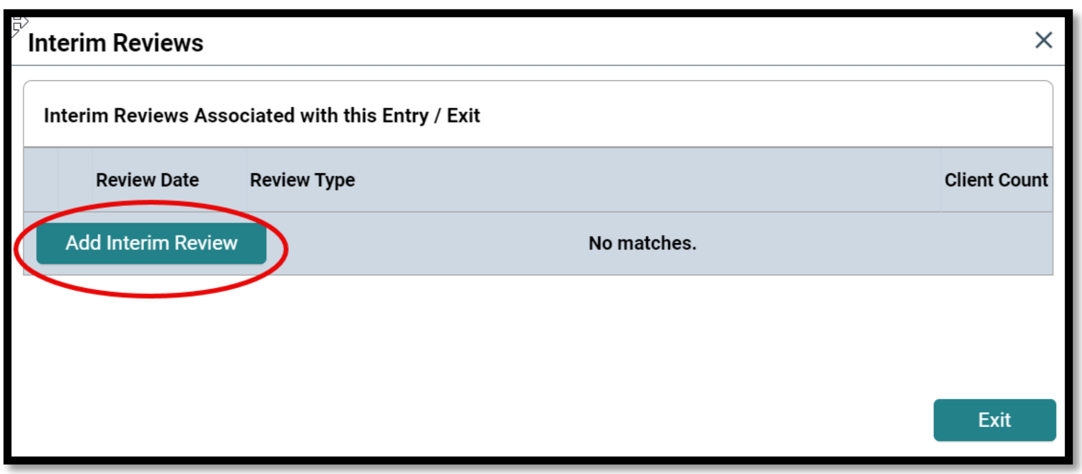
This section will cover updating a client's record in HMIS. If you are working with a household, you will want to select the Head of Household for the following steps. Refer to the below picture for next steps.

1) Click on the "Entry / Exit" tab.

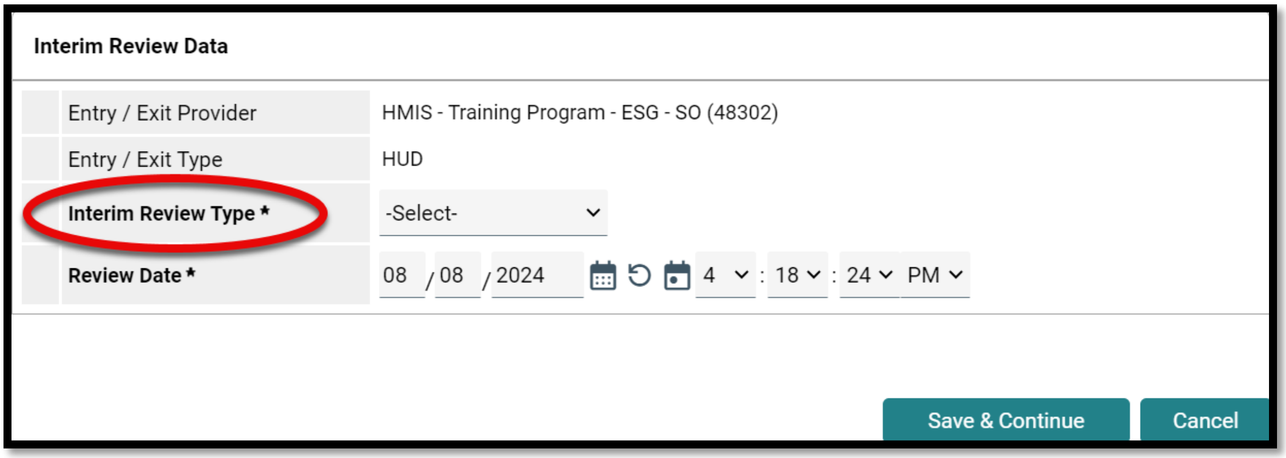
2) Find your project's line of entry and click on the "Interims" icon (circled below).
    a. A pop-up will appear. Refer to the below picture for next steps.



3) Click the "Add Interim Review" button on the pop up window (circled above).
    A new pop-up will appear. Refer to the below picture for next steps.



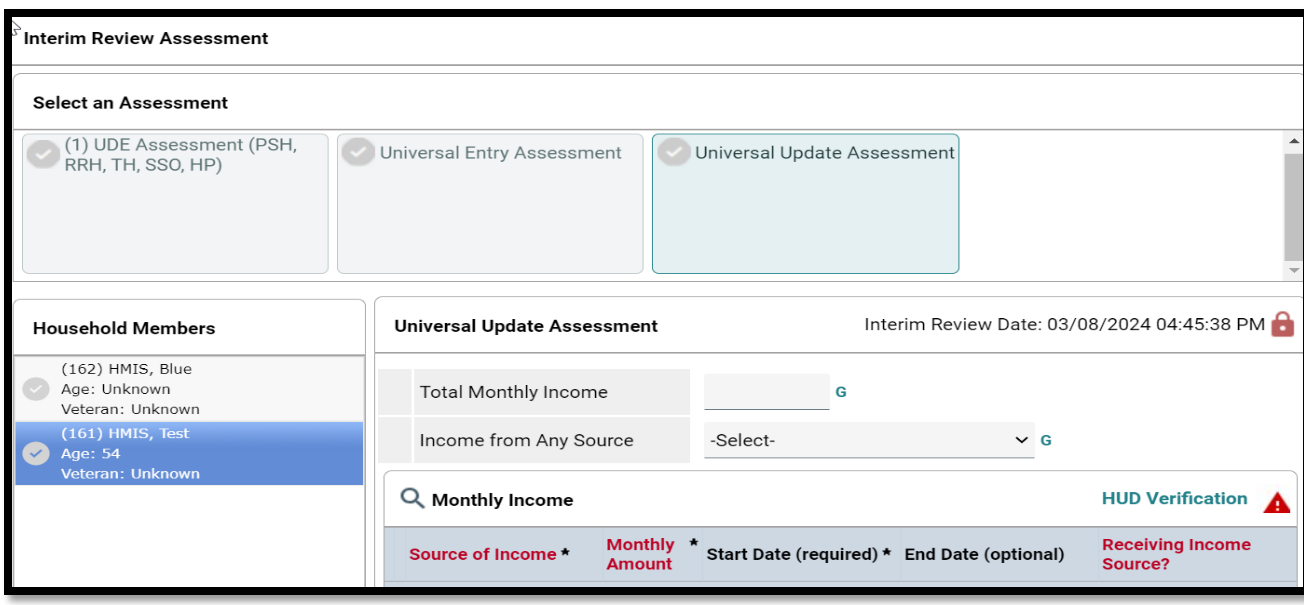
4) Select the "Interim Review Type" from the drop down list (circled below).
    a. **Annual Assessment:** A mandatory interim update required for all project stays over 365 days. This must be recorded on each client's record within a 60 day window of the client's project anniversary (plus or minus 30 days of anniversary date), even if there is no change in client's status. The head of household's anniversary will apply to the entire household.
    b. **Update:** This is used for any update not for the annual assessment. Please refer to your agency regarding requirements for completing regular updates.



5) Ensure the "Review Date" is correct. This date should reflect the date you were informed of the change, not the actual date a change in status occurred.

6) Click "Save & Continue".

7) The appropriate update assessment will automatically populate, as pictured below.

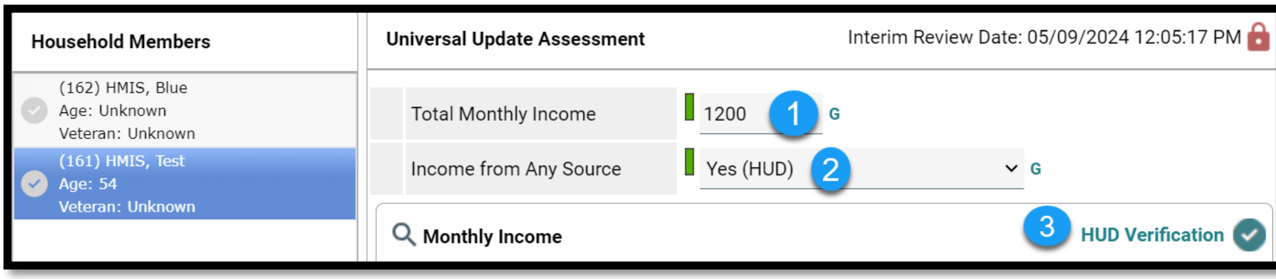


Making Adjustments to Income

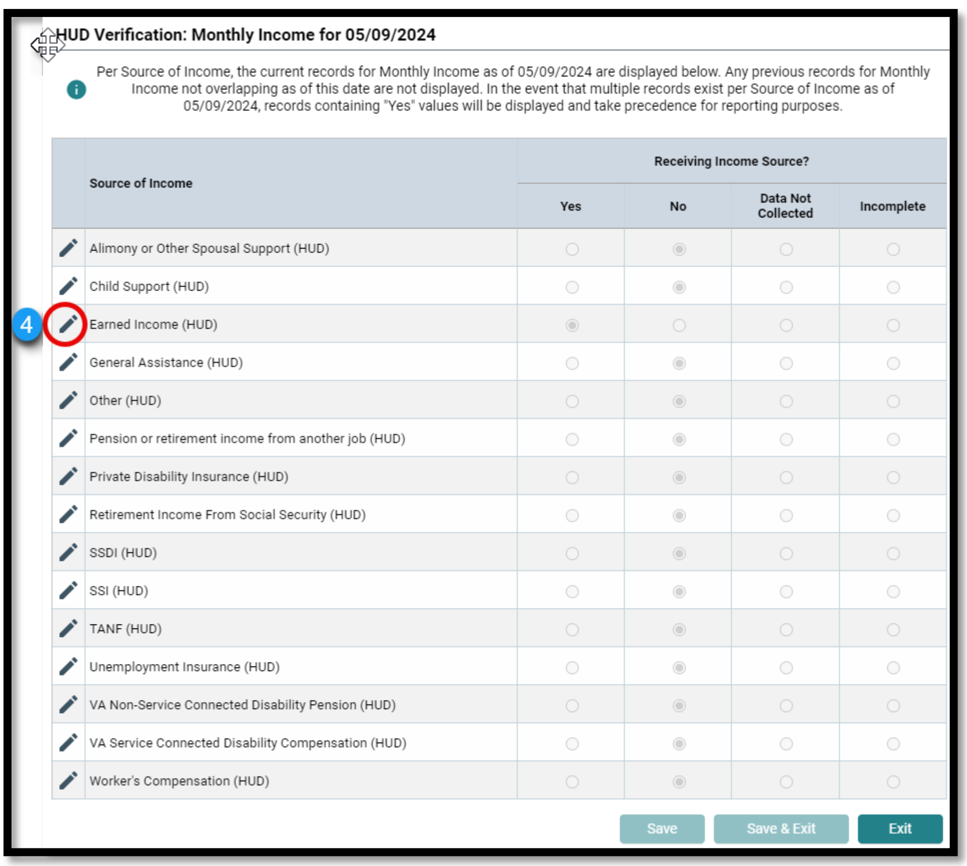
The next two sections cover how to adjust income. Please remember that every income change will create one additional row under the **Monthly Income** section.

1) Change the text field "Total Monthly Income" to the new monthly amount (pictured below).

2) Change the "Income from any Source", as necessary. If the income is going from 0 to something, change the value to "Yes". If it is only a change in income, you may leave the response as "Yes" (pictured below).



3) Next, click the blue HUD Verification Link (pictured above).
   a. A pop-up will appear. Refer to below picture for next steps.

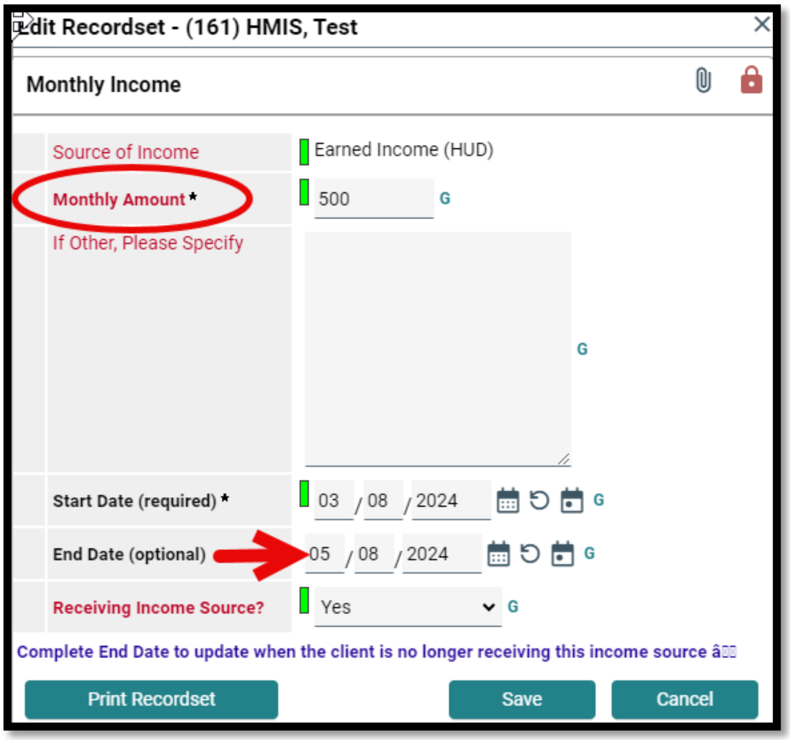


HUD Verification: Monthly Income for 05/09/2024

Per Source of Income, the current records for Monthly Income as of 05/09/2024 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 05/09/2024, records containing "Yes" values will be displayed and take precedence for reporting purposes.

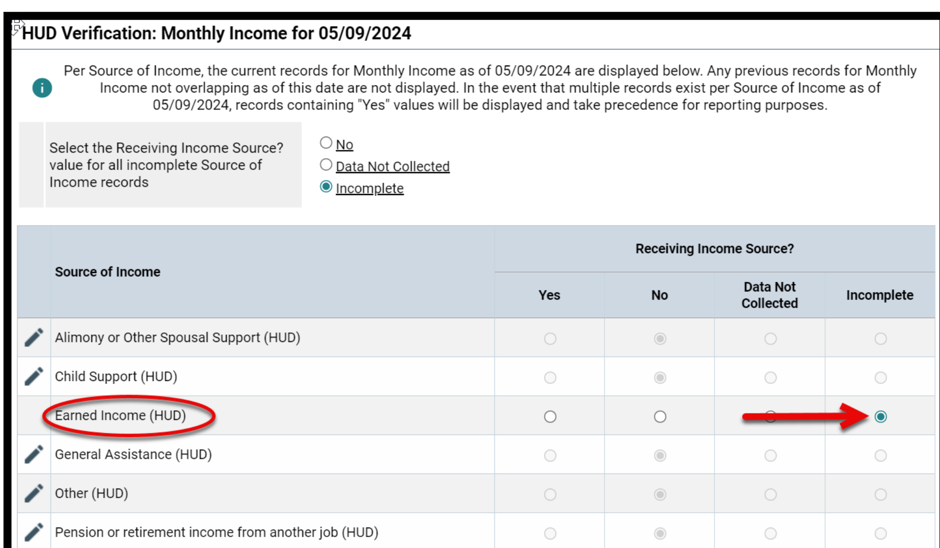
Source of Income	Receiving Income Source? Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	○	●	○	○
Child Support (HUD)	○	●	○	○
Earned Income (HUD)	●	○	○	○
General Assistance (HUD)	○	●	○	○
Other (HUD)	○	●	○	○
Pension or retirement income from another job (HUD)	○	●	○	○
Private Disability Insurance (HUD)	○	●	○	○
Retirement Income From Social Security (HUD)	○	●	○	○
SSDI (HUD)	○	●	○	○
SSI (HUD)	○	●	○	○
TANF (HUD)	○	●	○	○
Unemployment Insurance (HUD)	○	●	○	○
VA Non-Service Connected Disability Pension (HUD)	○	●	○	○
VA Service Connected Disability Compensation (HUD)	○	●	○	○
Worker's Compensation (HUD)	○	●	○	○

4) Click the Pencil Icon next to the Income Source that is being updated. (pictured above)
   a. A pop-up will appear. Refer to below picture for next steps.

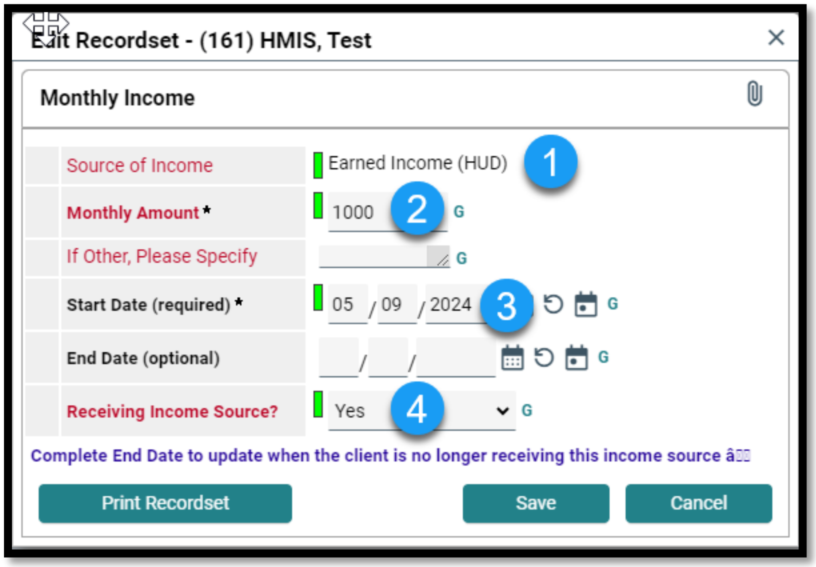


5) As a rule, you will **never** change the value of existing information. You will only update values for fields with no data. Update the following fields, as applicable.
   a. "Monthly Amount": If this already has a value, **do nothing**. If this field is blank, put a zero as the amount.
   b. "End Date": This should reflect the ***day before*** the new income was reported to you (arrowed above).

6) Click the "Save" button.
   a. The pop-up will close. You will now see the previous pop-up window. Please refer to the picture below for next steps.

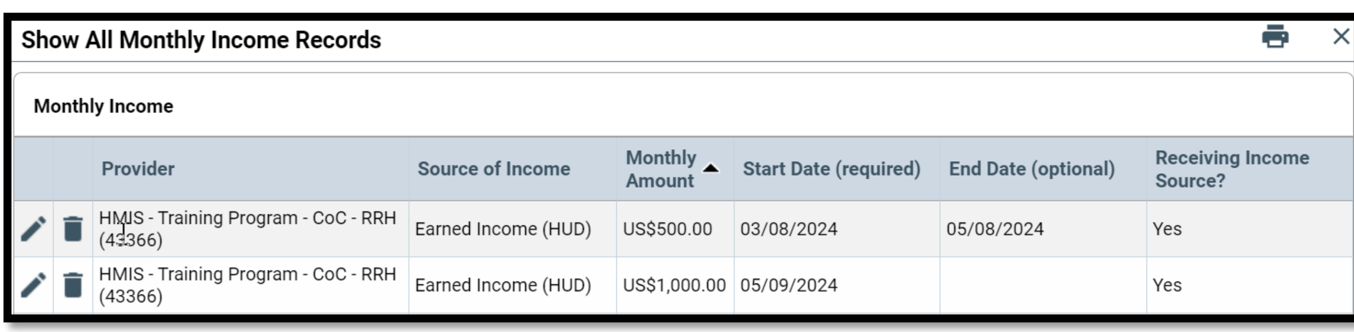


7) Please note that the circled **Earned Income** row now shows as incomplete prompting us to update the information. Selecting “Yes” will open a new Edit Record set Pop-Up (pictured below).



8) Complete the following fields. Leave "End Date" blank.
   a. **Source of Income**: This should be the same as the previous income source. In this example, it will be earned income.
   b. **Monthly Amount:** This is the new dollar amount the client is making.
   c. **Start Date:** This should be the date the client reported the information to you not necessarily when they started receiving this income source
   d. **Receiving Income Source:** This will be a “Yes” as the client is making some amount of money.

9) Click “Save”. You will now see two rows of the income type, which means the update was done correctly. One will have an end date, and the other should not have an end date. This is pictured below.



Show All Monthly Income Records

Monthly Income

Provider	Source of Income	Monthly Amount	Start Date (required)	End Date (optional)	Receiving Income Source?
HMIS - Training Program - CoC - RRH (43366)	Earned Income (HUD)	US$500.00	03/08/2024	05/08/2024	Yes
HMIS - Training Program - CoC - RRH (43366)	Earned Income (HUD)	US$1,000.00	05/09/2024		Yes

Key notes for Updating Income

2) Never Update previously entered information. Instead, add an “End Date” and enter new information to make updates.
3) “Start Date” is the day new income was reported to you. This may not reflect the day the client started receiving that income in real life.

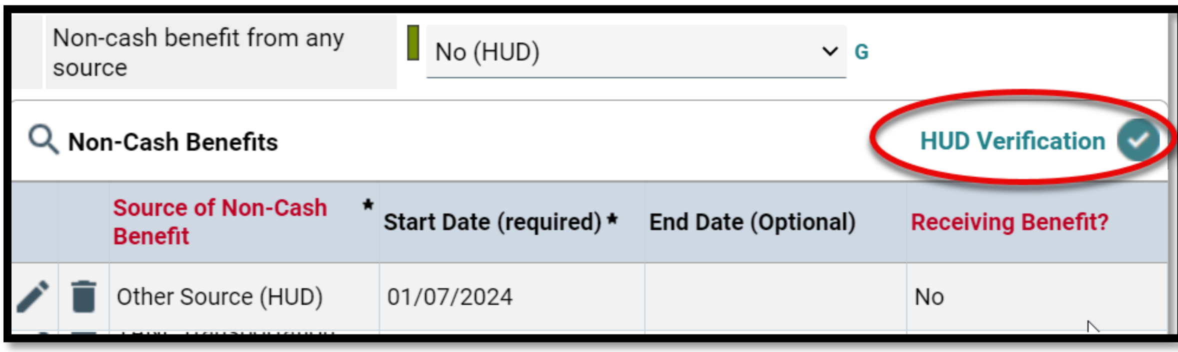
4) When updating the “End Date”, it should be the day before the new income amount was reported to you.
5) Always check the HUD Verification Field ensure that after updating there is still a Green Check. This indicates updates were completed successfully. If a Green Check is not present, click the HUD Verification button again to complete additional required fields.

Making Adjustments to NON-CASH BENEFITS or HEALTH INSURANCE

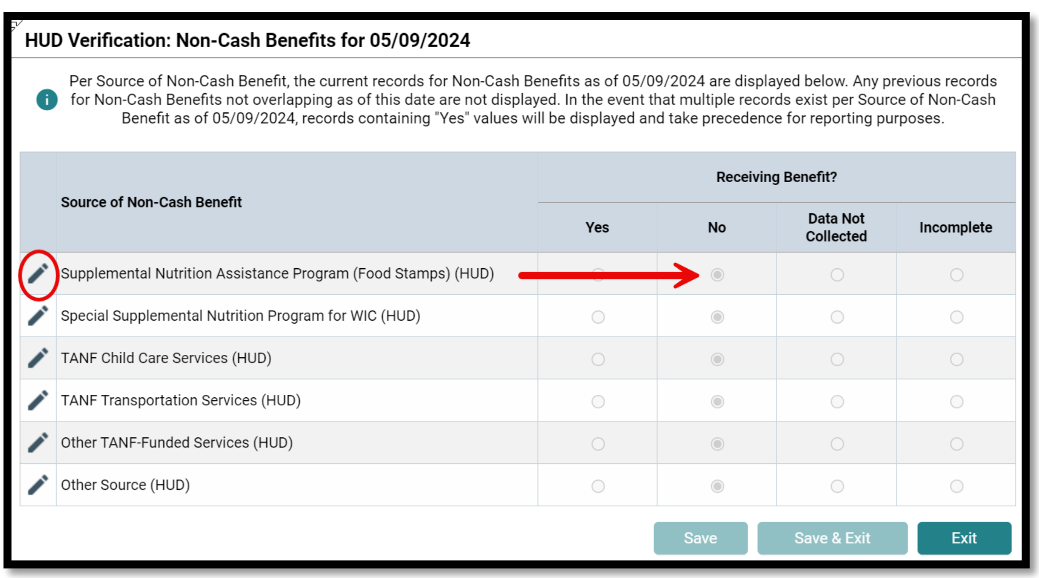
The next sections will cover how to record updates to non-cash benefits and health insurance.

To change a previously recorded NON-CASH BENEFIT or HEALTH INSURANCE record:

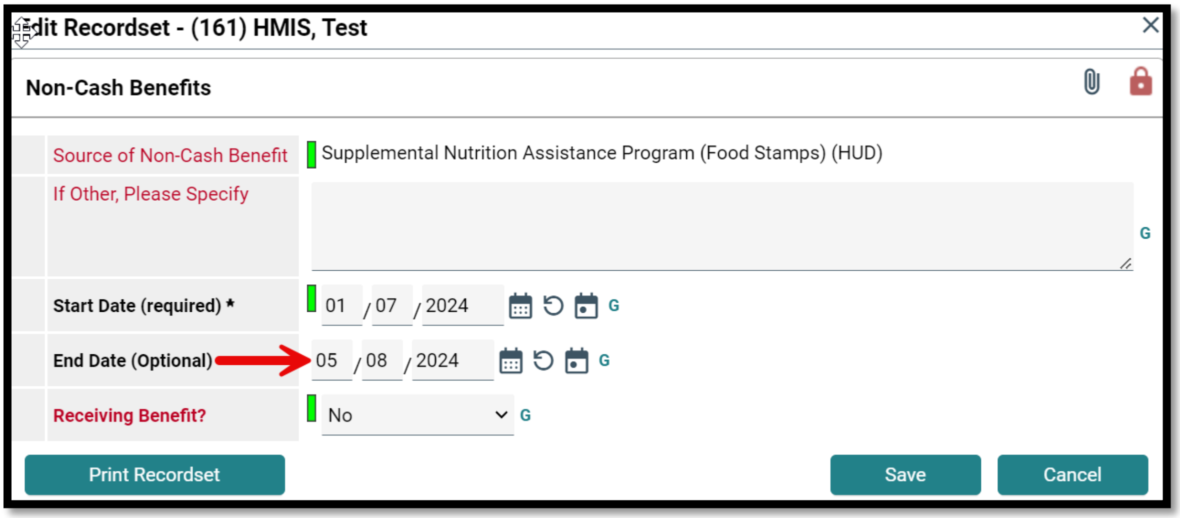
1) Ensure the “Non-cash benefit from any source” **OR** “Covered by health insurance” field reflects a ‘No’ or a ‘Yes’ (pictured below) that will match the information in the HUD verification.



2) Next, click the HUD Verification Link next to the **Non-Cash Benefits** OR **Health Insurance** sub-assessment header (pictured above).
   a. A pop-up will appear. Refer to below picture for next steps.

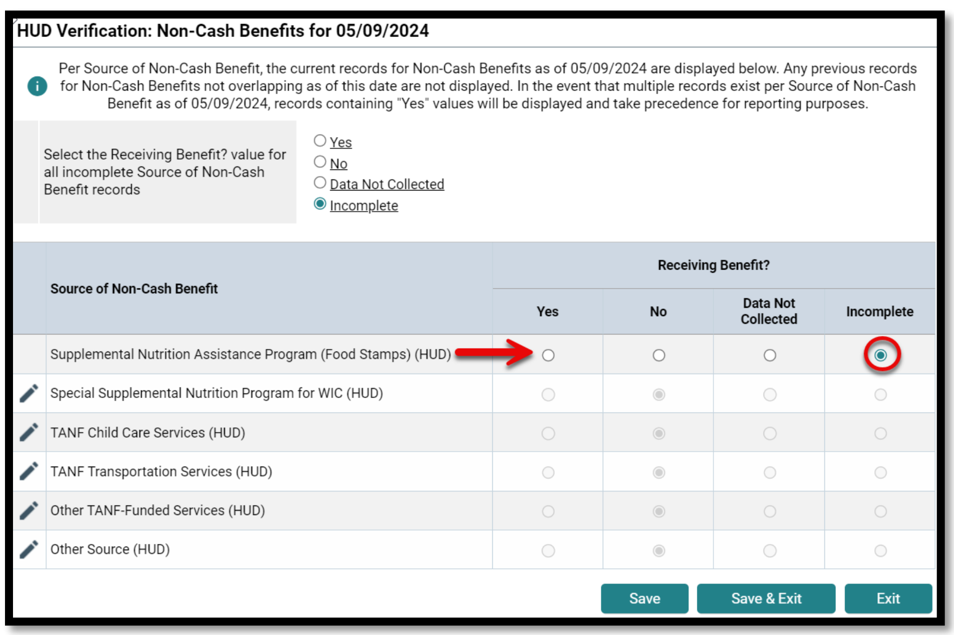


3) Find the non-cash benefit or health insurance type that is changing. In this example, **Food Stamps** is being used. Click the pencil on the left side of the row (circled above).
   a. A pop-up will appear. Refer to the picture below for next steps.



4) Enter an "End Date". This should reflect the ***day before*** the new benefit was reported to you (arrowed above).

5) Click the "Save" button.
   a. The pop-up will close. You will now see the previous pop-up window. Please refer to the picture below for next steps.



6) Please note that your **Food Stamps** row looks different it is showing as the circled incomplete.
   a. Click the "Yes" or "No" button as appropriate.

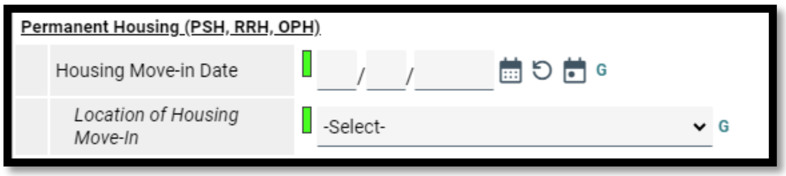
7) Click "Save & Exit". You will now see two rows of the benefit type., which means the update was done correctly. If the HUD Verification field has a green check mark, it means the data was updated correctly.

Recording a Housing Move-In Date

The following section includes instructions for recording the date a client moved into housing and is relevant to housing programs only. This includes Rapid Re-Housing, Permanent Supportive Housing, Permanent Housing, and Other Permanent Housing. If there is a date recorded in this field, please update it to the date the client moved into housing.

1) Navigate to the UDE Assessment

2) Find the section pictured below



3) Record the date the client moved into housing.

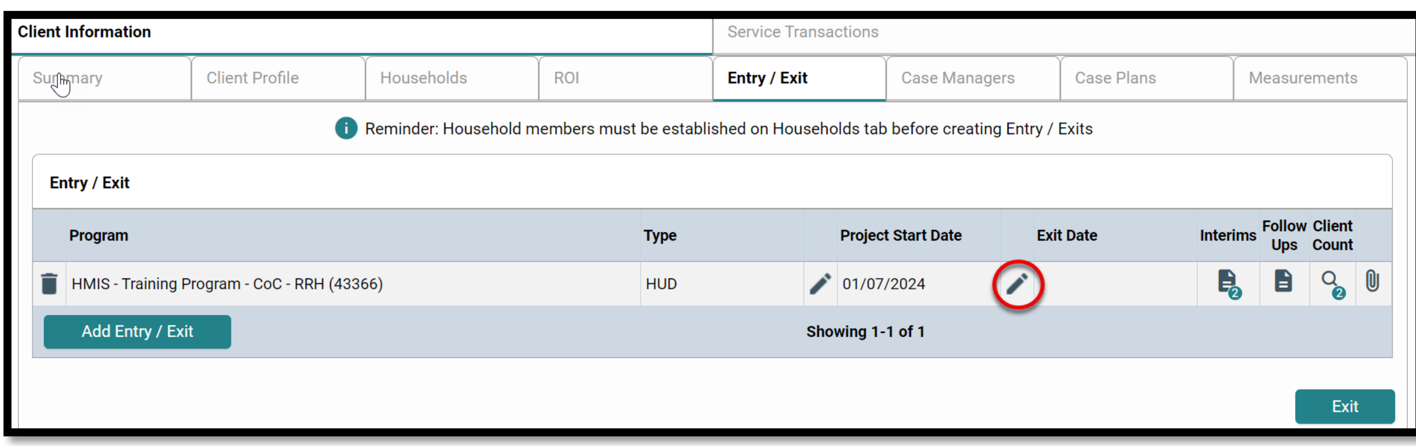
4) Use the drop-down "Location of Housing Move-In" to record the city or county the client was housed in.

Exiting your family from your project/grant

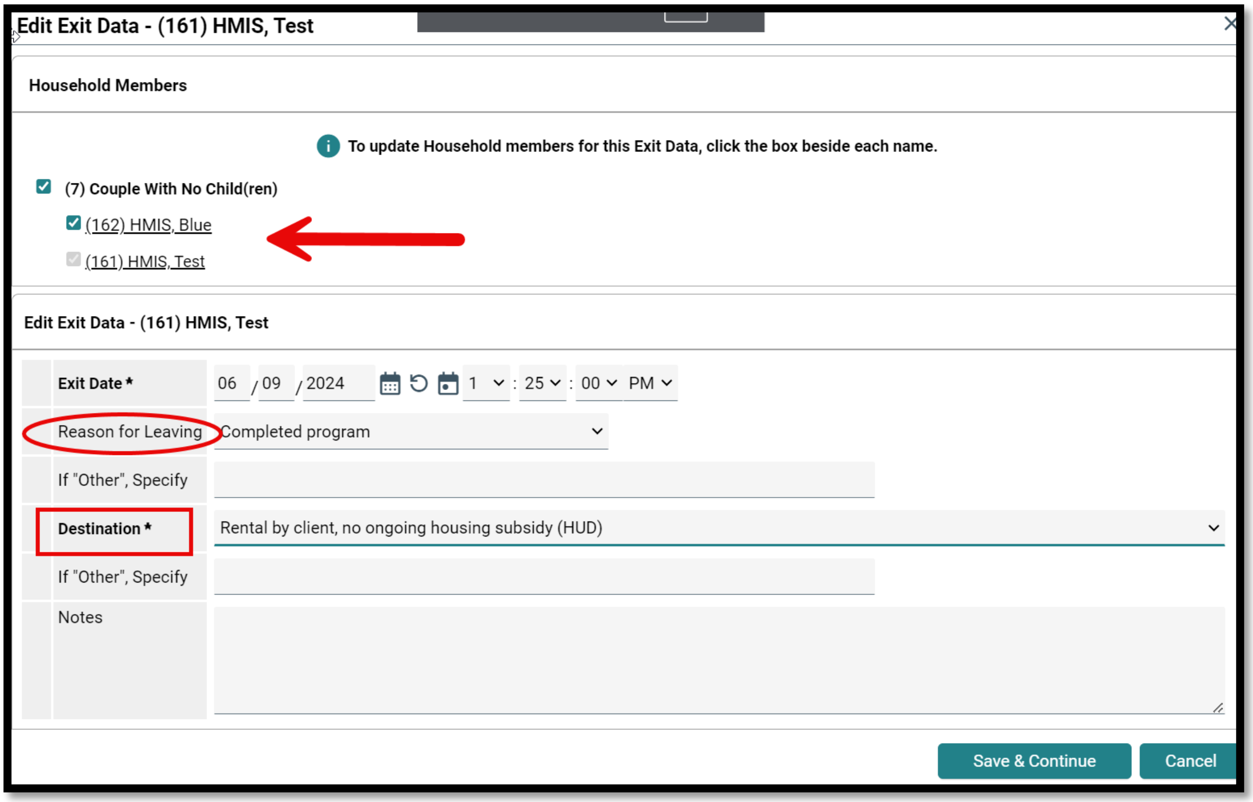
This section will cover exiting a client from your project in HMIS. If you are working with a household, you will want to select the Head of Household for the following steps. Refer to the below picture for next steps.

1) From the client's record click on the "Entry/Exit" tab for your project.

2) Find the appropriate line of entry into your project on the "Entry/Exit" preview pane.



3) Locate the blank **Exit Date** column and click the pencil icon to the left to exit your household (circled above).
   a. A pop-up will appear. Please refer to the below picture for next steps.



4) Under the Household Members section, checkmark every family member's name that is leaving with the Head of Household (arrowed above).
    a. Please do not leave minor children in the project without an adult.
    b. Sometimes a single family member will exit the project while the rest of the family stays. In this case you should locate the HMIS record of the person who is leaving only and create the exit from their record, and only include them in the exit.
        a. If the Head of Household is the exiting family member, you will need to re-designate the Head of Household both on the "Households" tab and within the **UDE Assessment** on the "Entry/Exit" tab. If the new Head of Household was added partway through the project, please reach out to the HMIS help desk.

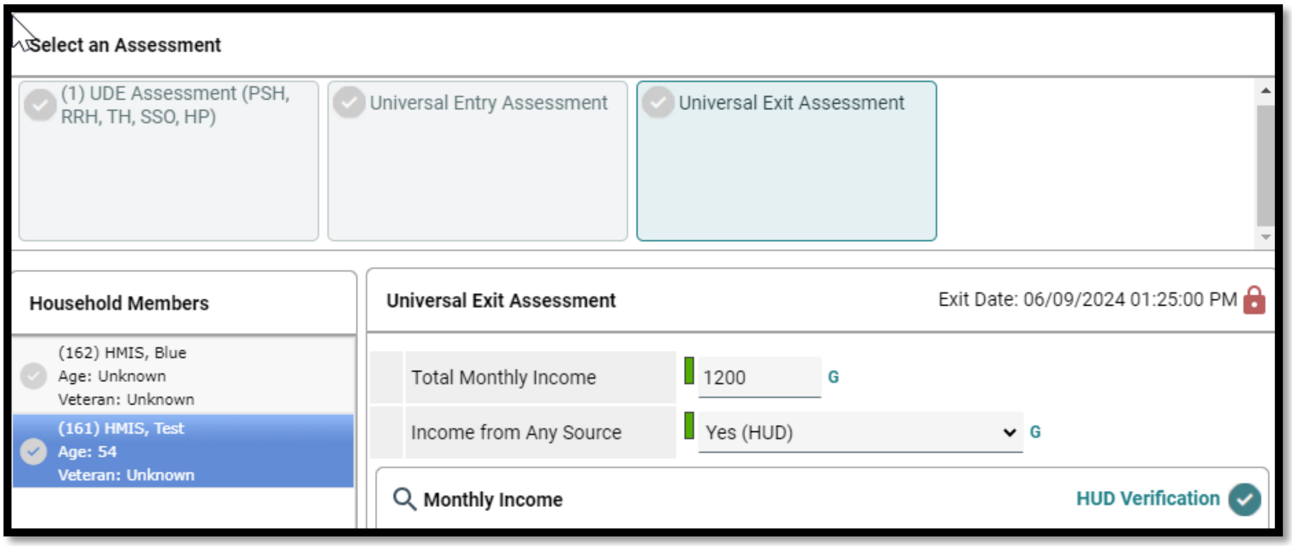
5) Ensure "Exit Date" is the actual date family left your project.

6) Select the appropriate "Reason for Leaving" from the dropdown list (circled above).

7) Complete "Destination" from the dropdown list (square above).

8) Click the "Save & Continue" button at bottom right side of the screen. A new pop-up will appear.

9) The **Exit Assessment** will default. The **Exit Assessment** is provided in case you need to make any last updates before the family exits. For more detail on how to perform updates, refer to the **How to do an Interim Update** section.
    a. Do NOT end income, benefits, or disabilities just because your client is leaving. Only end income, benefits, or disabilities if the client truly does not receive them as of the end date.
    b. Ensure that you complete the exit assessment for every member of the household.



10) Depending on your grant source and funding, you may have to complete additional program elements.
    a. **Note**: The following programs should refer to their addendum for additional program elements.
        - **SSVF**
        - **RHY**
        - **ESG**

11) Click the "Save & Exit" button to finish and exit the client or household.

12) You will be directed back to the "Entry / Exit" preview pane. Locate the appropriate line for your project exit and ensure exit date is correct.

Household Management

How to add an additional member to an existing household

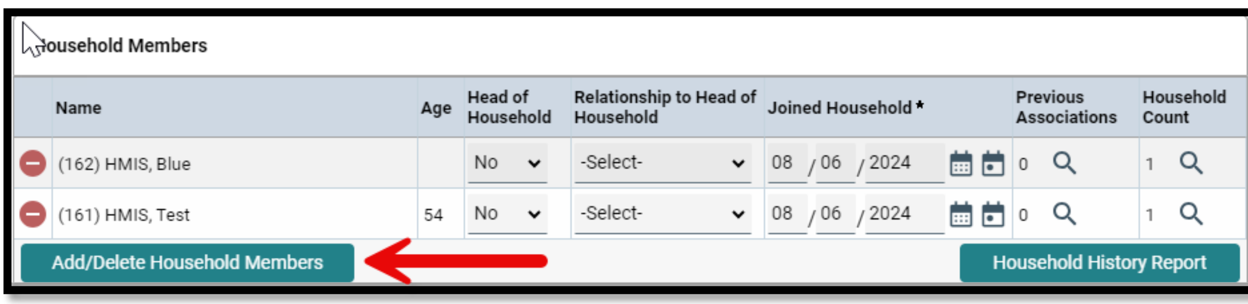
1) Find the Head of Household (primary client) for your family group and click on the Households tab.

   a. **Note**: Do not ever remove a household member from an existing household. Neither should you create another household when the household composition changes. Ultimately, the "Household" tab is a list of all potential personal associations past and current. This list in no way implies all of the clients are still actively involved in each other's lives.

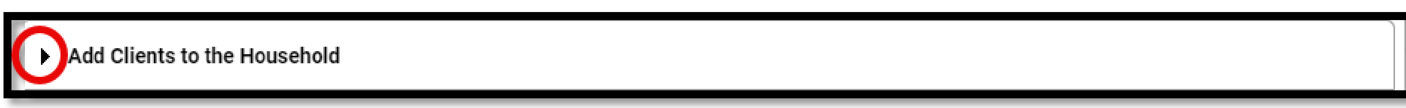
      You are able to exclude old household members from project entries, or add new members to it, as needed. If you have an unusual circumstance, or the client already has multiple households, please contact the HMIS help desk for assistance on how to proceed.

2) Click on the "Manage Household" button under the existing household.

3) Click on the "Add/Delete Household Members" button.



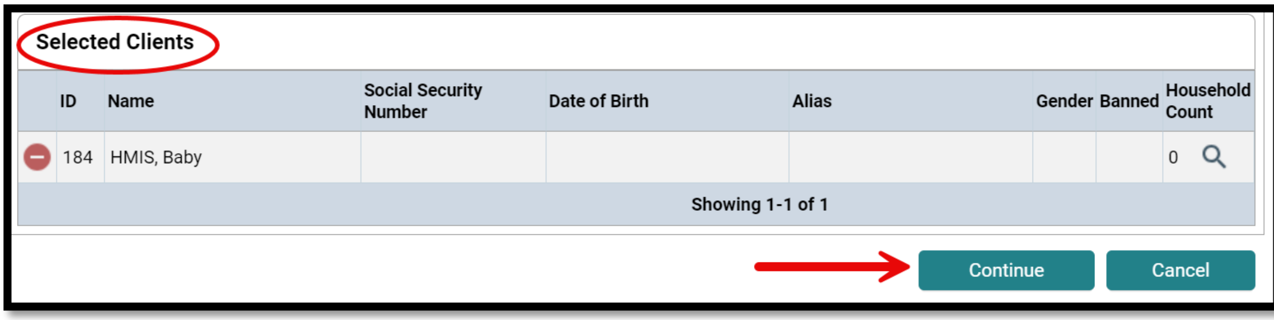
5) Expand the Add Clients to the Household section by clicking black arrow in order to view client search screen.



6) Search for new household member either by name, or client ID number.
   a. **Note**: If you believe this client may be new to the system (for instance, a small child) be sure to fill in all data you can gather on the search screen because you will be creating a new client record right now.

7) If the client was already in the system, then choose them from the "client results" area by clicking green plus sign **OR** if the client is NOT already in the system, click the "Add New Client With This Information" button.

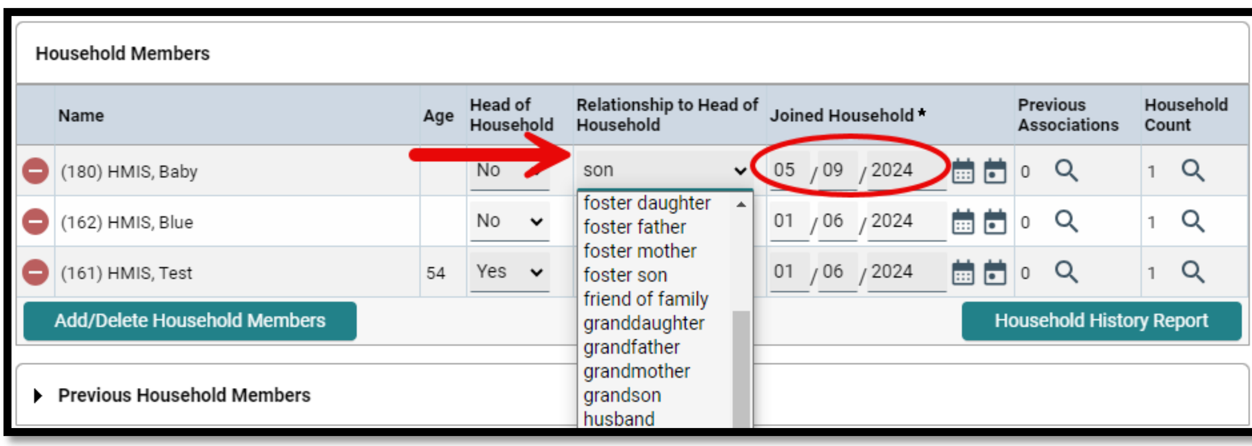
8) For either outcome, the new household member's name should end up at the bottom of the screen under the "Selected Clients" section (pictured below). Click the "Continue" button.



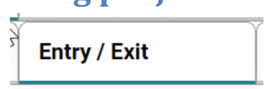
9) Find the new client on the household members list and designate their relationship to the Head of Household.

10) Correct the date the client "Joined" the Household, if it isn't the current date.

11) Click "Save & Exit" at the bottom of the screen.



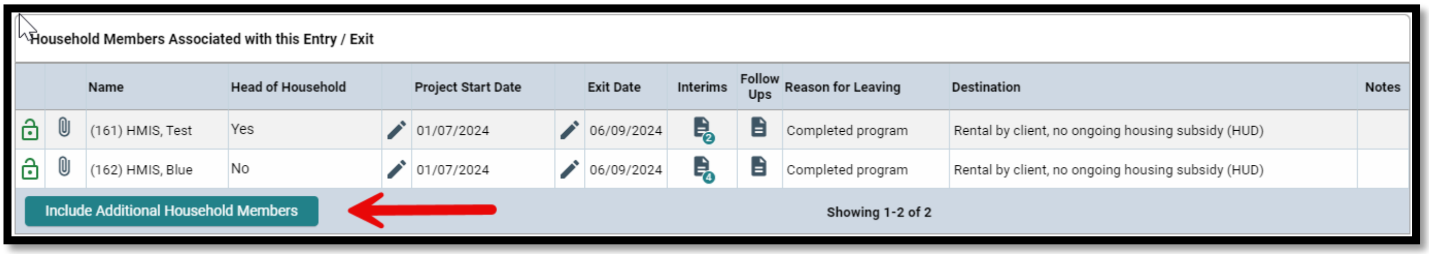
Adding the new household member to the household's existing project entry

1) From the Head of Household's client record, click the Entry/Exit tab. 

2) Find the line of entry into your project and edit the entry by clicking the Edit Entry pencil icon.
   a. *Note there is a button on this first pop up window that says "Include Additional Household Members"…DO NOT use this button.*

3) Click "Save & Continue" button.

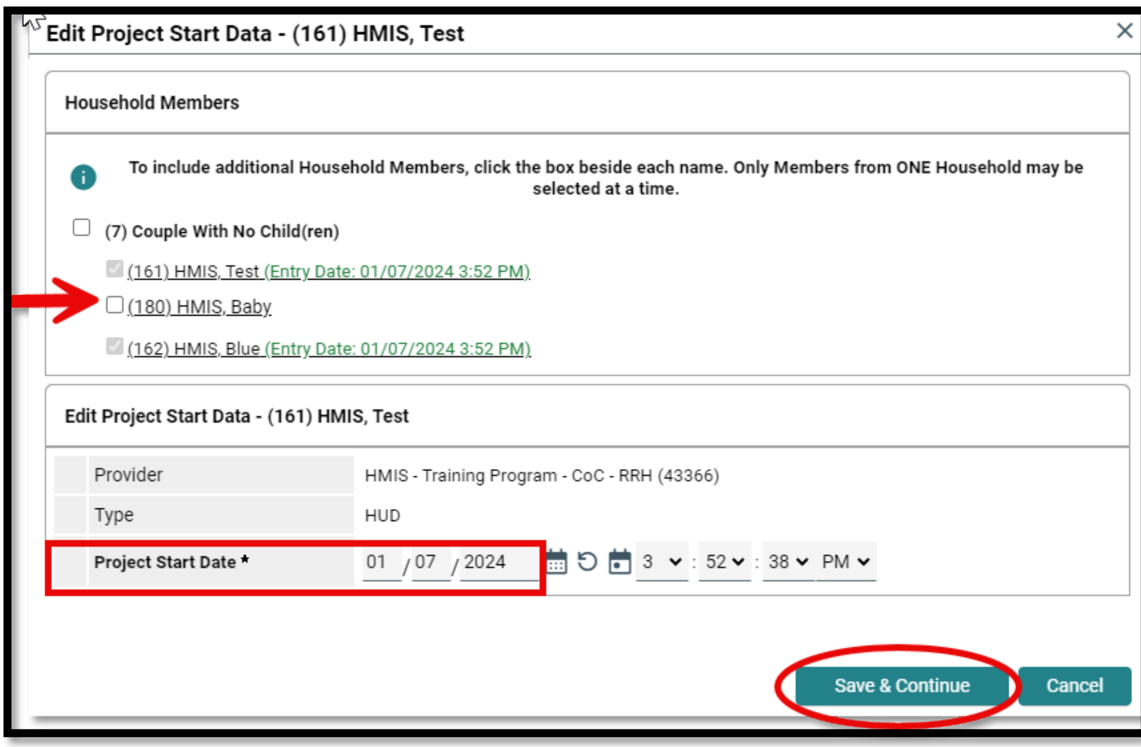
4) Find the "Household Members Associated with this "Entry/Exit" section, underneath everyone's name, and NOW click the button "Include Additional Household Members" (pictured below).



5) Find the new client in the family group and check mark their name (arrow below).

6) Go to "Entry Date" and **CHANGE** the date to the actual date this new household member joined the family group (square below). *It defaults to the HoH's entry date, do not use that date!*

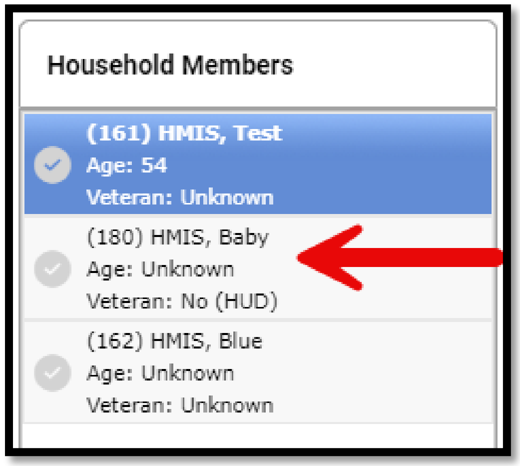
7) Click "Save & Continue" button.



8) Ensure new household member's date of entry is correct (different from the other members).

9) From the Head of Household's assessment screen, scroll down to the listing of the Household Members on the left side of screen.

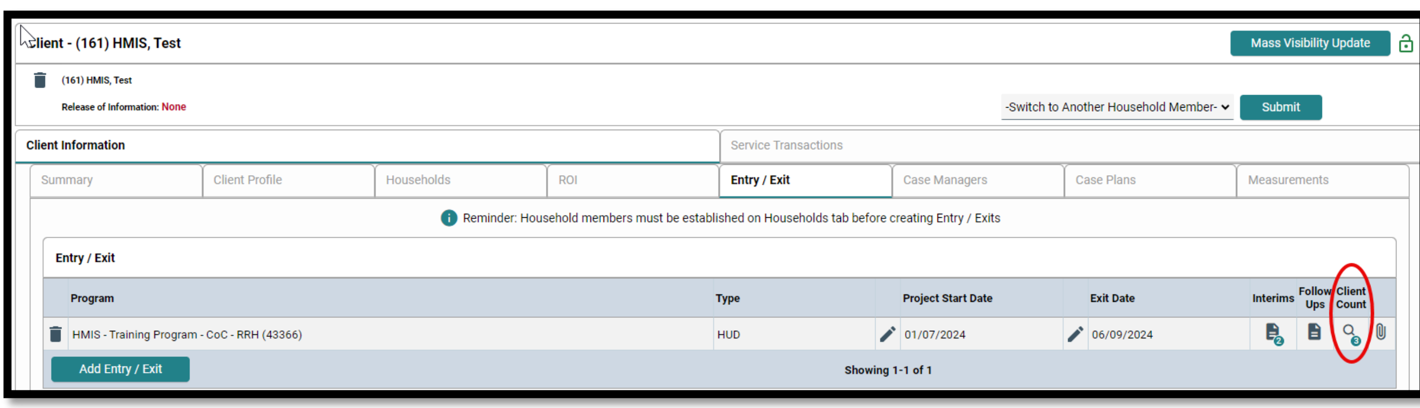
10) Select the new household member from this list by clicking on their name (arrow below).

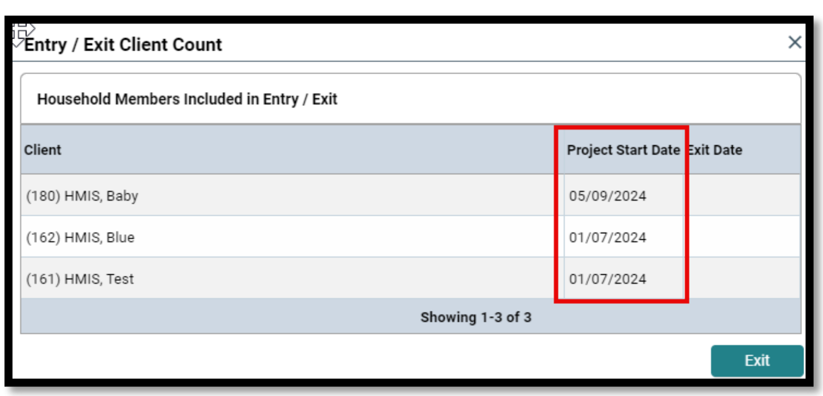


11) Complete this new household member's UDE Assessment, and then the Universal Entry Assessment, and any other custom assessments if applicable to your project/grant.

12) Click "Save & Exit" button when the new family member's assessment data entry is complete. You will be returned to the Head of Household's Entry/Exit preview pane.

13) Click on the "Client Count" icon to verify new household member is added to the family group's entry with the correct date (circle and square below).





How to make corrections to data entry errors in HMIS

In general, you will usually be opening up an existing entry/interim/exit when doing corrections. However, more complicated corrections may require entry/exits to be deleted and re-created. For any questions on correcting more complicate data entry errors, please reach out to the HMIS help desk.

- Please use the following instructions for errors to basic answer fields on either the "Maricopa UDE Assessment" or the various universal assessments such as the "Universal Entry Assessment", "Universal Update Assessment", or "Universal Exit Assessment".
- Before starting, determine which area of the client record needs corrected, the entry answer(s), interim update answer(s), or exit answer(s)…and then use the appropriate edit tools to make your corrections in the right place (usually where the question was originally answered).

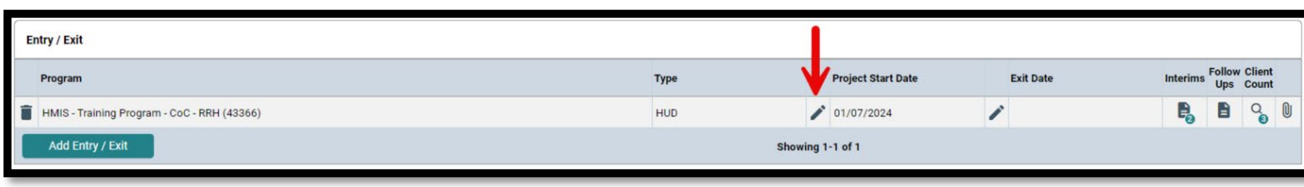
Correcting data at the client's entry, such as Date of Birth

1) Enter Data As to the appropriate project/grant, if applicable.

2) Find your client.

3) Click on the "Entry/ Exit" tab.

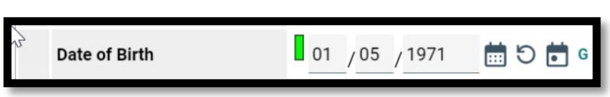
4) On the Entry/Exit tab find the current line of entry into your project, click on the Edit Entry pencil icon to the left of the entry date.



5) The Entry/Exit window will pop up. Click "Save & Continue".

6) The UDE Assessment will default and this is the assessment you should use to make the correction for "Date of Birth", since this was where the answer was originally recorded.

7) Find the answer that needs to be corrected (in this example, "Date of Birth") and change it to the correct answer.

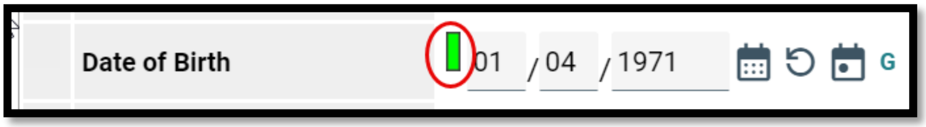


TO

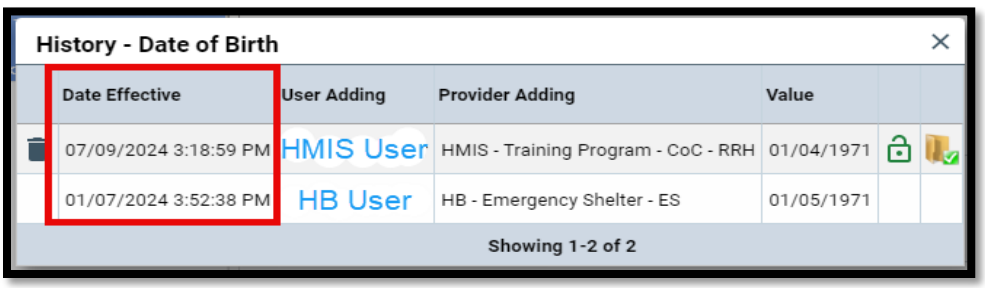
8) Scroll to bottom of assessment and click the "Save" button *(**NOT** "Save & Exit", you are not done yet).*
   a. *Note: You may have noticed in the past, that when you complete an assessment and save it, you will either see Answer Age Color Bars appear, or they will change color, to the left of the question field answers. The darker the color the older the answers are. However, this Answer Age Color Bar is also how we access the "History" of this answer.*

9) Determine if the error was made by your project at this current entry, or if the error was made by a prior entry or prior service provider. Follow the steps below to determine this and complete the correction right.

10) Click on the Answer Age Color Bar next to the answer you just corrected.



11) The History pop up window will open, please review the information to determine your next step.
   a. If the wrong answer was entered by a *different provider and/or on a prior date*, it is not necessary to delete the wrong answer because your newer saved answer supersedes it. Just close the History window by clicking the X.



History - Date of Birth

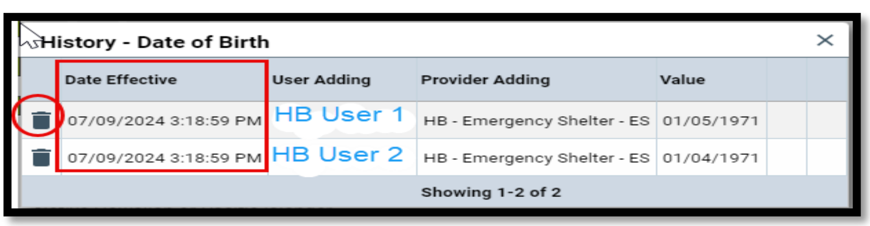
Date Effective	User Adding	Provider Adding	Value
07/09/2024 3:18:59 PM	HMIS User	HMIS - Training Program - CoC - RRH	01/04/1971
01/07/2024 3:52:38 PM	HB User	HB - Emergency Shelter - ES	01/05/1971

Showing 1-2 of 2

   b. Scroll to bottom of assessment and click "Save & Exit" button to complete correction and exit the entry assessment.

   c. If the wrong answer *was entered by your project on the current entry date*, then you must delete the incorrect answer. You can verify this by looking at the "Date Effective" of both answers. If the date and time stamp are exactly the same, then the error was created by your project.

   d. Delete the wrong answer. Do this by clicking the "Trash Can" icon next to the wrong answer.



History - Date of Birth

Date Effective	User Adding	Provider Adding	Value
07/09/2024 3:18:59 PM	HB User 1	HB - Emergency Shelter - ES	01/05/1971
07/09/2024 3:18:59 PM	HB User 2	HB - Emergency Shelter - ES	01/04/1971

Showing 1-2 of 2

12) You will be asked to verify you want to delete this item, click "Delete" button.

13) Close the History window by clicking the X.

14) Scroll to bottom of assessment and click "Save & Exit" button to complete correction and exit the entry assessment.

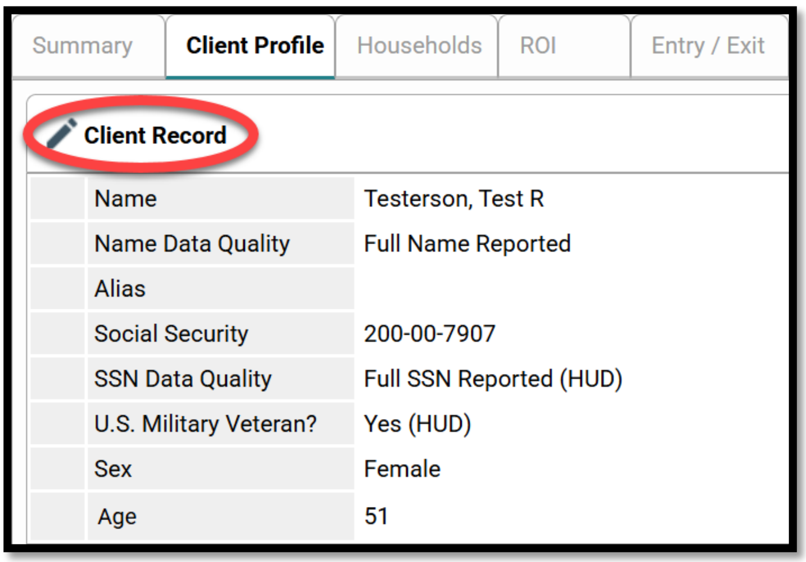
How to correct mistakes, or missing data, on the Client Profile page

The directions below show how to fix the following items on the client record:

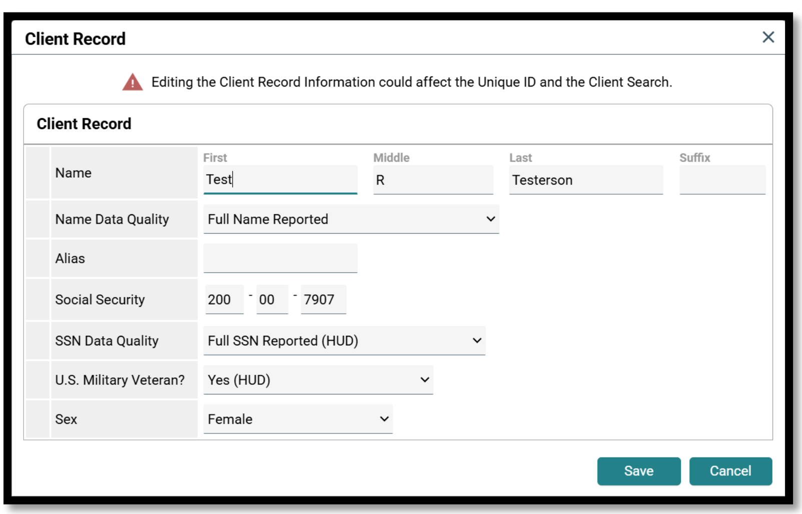
- Name / Name spelling / Alias / Name Data Quality
- Social Security number / SSN Data Quality
- U.S. Military Veteran status
- Sex

1) Find your client and ensure you are on the "Client Profile" tab.

2) Click the "Edit Client Record" pencil icon next to the Client Record header.



3) The client record edit screen will open. Make the appropriate corrections, Click the "Save" button.



Helpdesk Contact Information:

Submit a Ticket:

https://community.solari-inc.org/submit-a-ticket/

Phone: 602-908-3605