HAMPTON ROADS HOMELESS MANAGEMENT INFORMATION SYSTEM

TRAINING MANUAL

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Introduction

A Homeless Management Information System (**HMIS**) is a local information technology system used to collect client-level data and data on the provision of housing and services to individuals and families experiencing and at risk of homelessness. All agencies utilizing government funding for homeless services provision are required to utilize the HMIS. The Planning Council serves as the HMIS Lead Agency for several Continua of Care and provides technical assistance and training for over 250 users located within service provider agencies, private, faith-based and governmental organizations.

Aggregate and specific data from the HMIS are used by local, state, and federal policymakers to inform decisions around homeless service provision. Local design and implementation of the HMIS is important as there are many benefits, including streamlined services for clients, the ability to track outcomes and identify service gaps, as well as guide communities to address homelessness based on the true picture of those experiencing, and at risk of, homelessness around them.

This training manual serves as a resource for new and experienced users of the Hampton Roads HMIS and is intended to support data collection and reporting efforts for all who need it. We wish to thank all our HMIS partners and funders for their continued support and assistance over the years.

System Overview

Community Services is a web-based software that houses the Hampton Roads HMIS. This system contains data for the following Continua of Care (CoC):

- BEACH Community Partnership (Virginia Beach), VA-503
- Lynchburg Continuum of Care (Central Virginia CoC), VA-508
- Greater Virginia Peninsula Homelessness Consortium (GVPHC), VA-505
- Portsmouth Homeless Action Consortium (PHAC), VA-507
- Southeastern Virginia Homeless Coalition (SVHC), VA-501

The Hampton Roads HMIS is located at: https://shelterlink.servicept.com

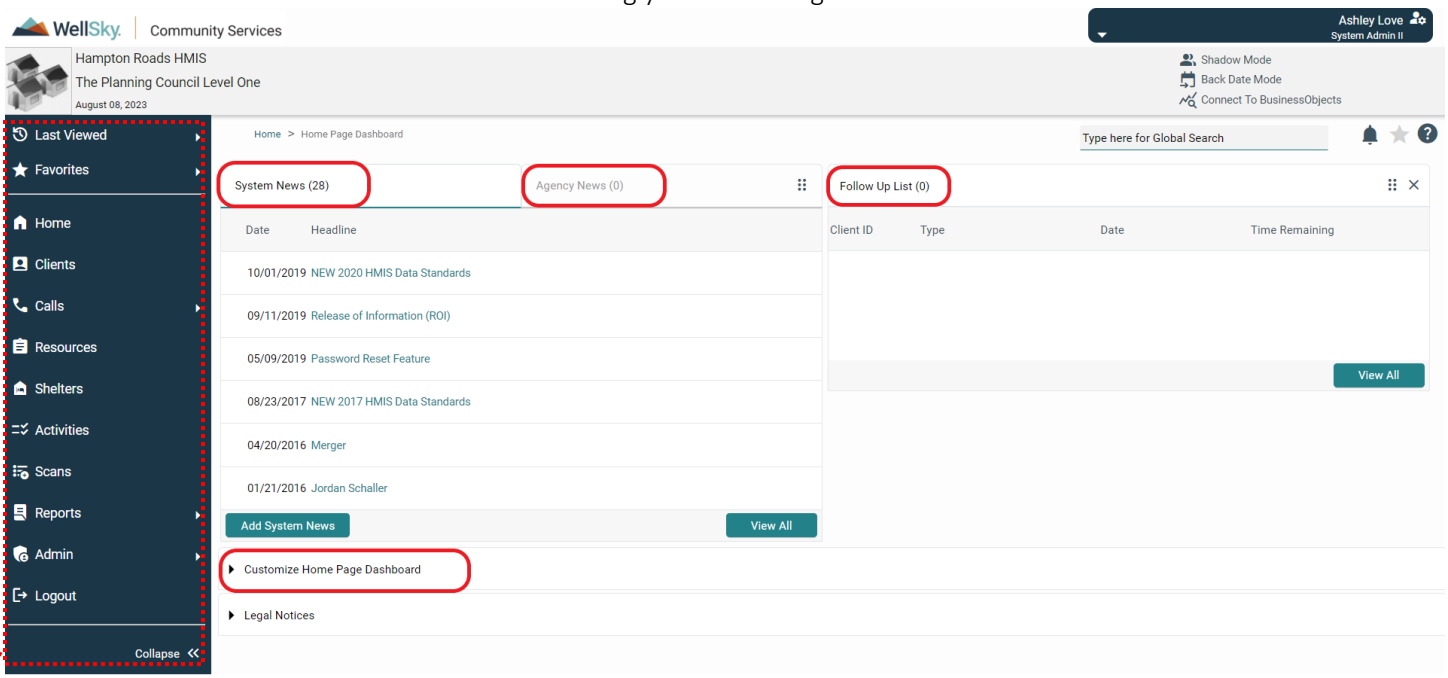
- Passwords must be 8 to 16 characters long and contain two numbers, a symbol, and capital letter.
- Never share your password
- Always log out of HMIS prior to leaving your work area.
- Do not hit the spacebar after your username.
- You will be prompted to change your password every 45 days.
- Users can reset their password should it be forgotten or typed incorrectly 3 times. The Forgot Password feature is a self-service tool that will send an email to the user.

Community Services Home Screen

The Home Page Dashboard is the first screen you will see after logging into Community Services. Community Services is divided into several modules that have different functions, but they work together to form a comprehensive client information management system. This manual will describe these modules in detail.

In the center of the home page you will see **System News**, **Agency News**, **Follow Up List** and **Customize Home Page Dashboard**.

- **System News** is used by System Administrators to post news for all users.
- **Agency News** can be used by Agency Administrators to post news for only their users.
- The **Follow Up List** provides a quick and easy way to review the status of client follow ups.
- **Customize Home Page Dashboard** is used to add Counts Reports to the dashboard. Contact a System Administrator for assistance with customizing your Home Page Dashboard.



On the far left-hand side of the screen you will see a series of tabs; these comprise the navigation pane. The navigation pane allows you to access certain functions and modules applicable to your agency. Accessible modules differ based on the settings established by the System Administrator when creating your account.

- **Last Viewed** – Keeps a list of the last clients accessed during a login session
- **Favorites** – Allows the user to create a list of favorite client profiles
- **Home** – Takes the user back to the Home Page Dashboard
- **Clients** – Allows the user to create and access client records
- **Calls** – Allows the user to record client Call Records
- **Resources** – Contains information on service providers
- **Shelters** – Allows shelters to document client check in and checkout, view bed availability, and more
- **Activities** – Used to assign clients to Provider activities
- **Scans** – Expedites the process of recording services provided to clients (can include the use of Client IDs that have a barcode)
- **Reports** – Houses canned (preformatted) reports
- **Admin** – A section used only by System Administrators
- **Logout** – Logs user out of HMIS
- **Collapse <<** – Collapses the navigation pane

Clients

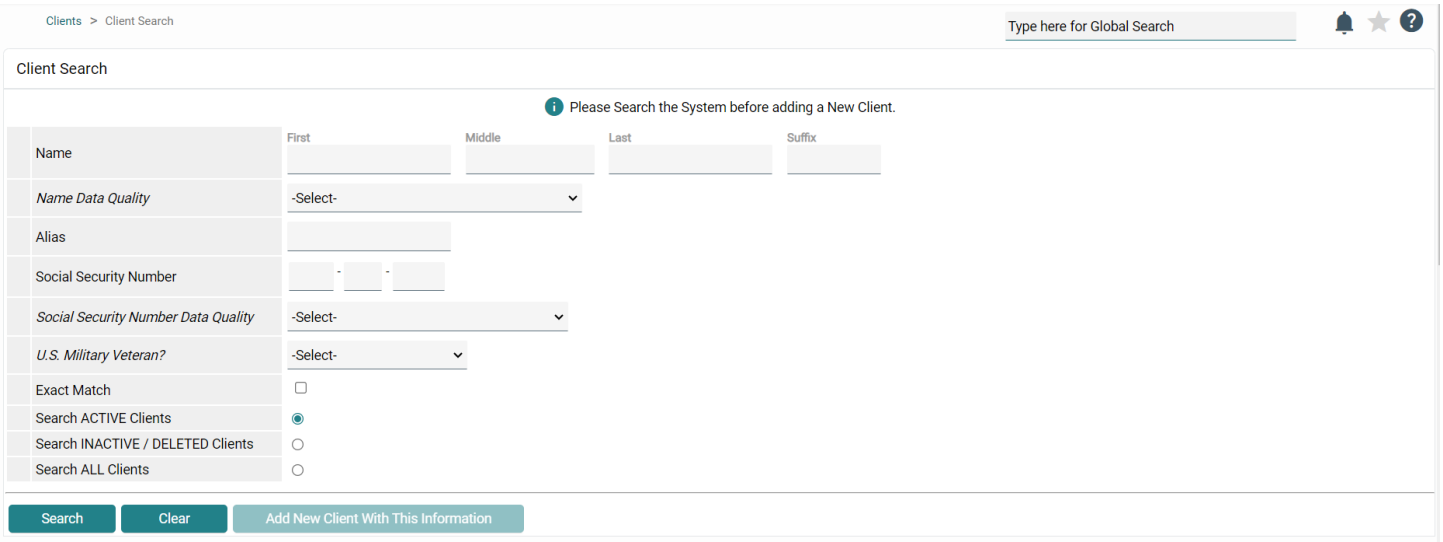
The Clients module allows users to perform the following tasks:

- Search for existing clients
- Add new clients
- View Client Profiles
- Create and manage existing households
- Add Release of Information
- Service Transactions
- Create an Entry/Exit
- Add Case Manager
- Create and manage Case Plans
- Create and manage Measurements
- Complete Assessments
- Record Services & Referrals

> **Helpful Hint:** ClientPoint is designed to conduct a search for a client record before creating a new record to prevent duplication.

Searching for a Client: Basic Search

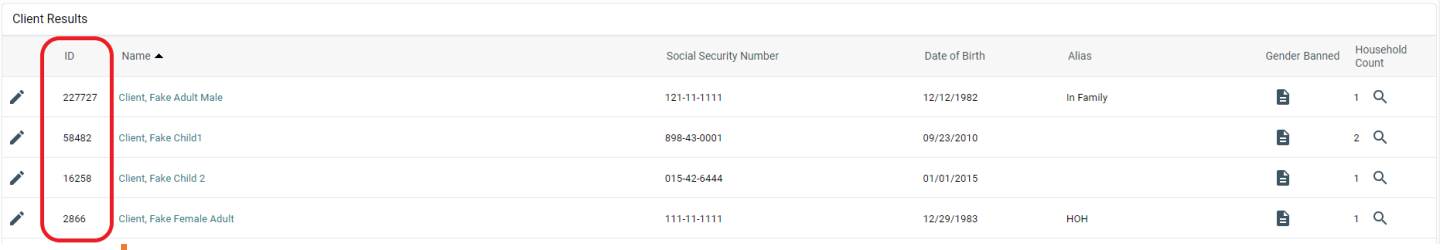
Click on the **Clients** tab on the navigation pane. The **Client Search** screen will be displayed.



> **Helpful Hint:** The screen may look different based on your settings.

Enter the client's name and/or any other key information (e.g. *Date of Birth or Social Security Number*) into the corresponding search fields. This can be done with partial or full information.

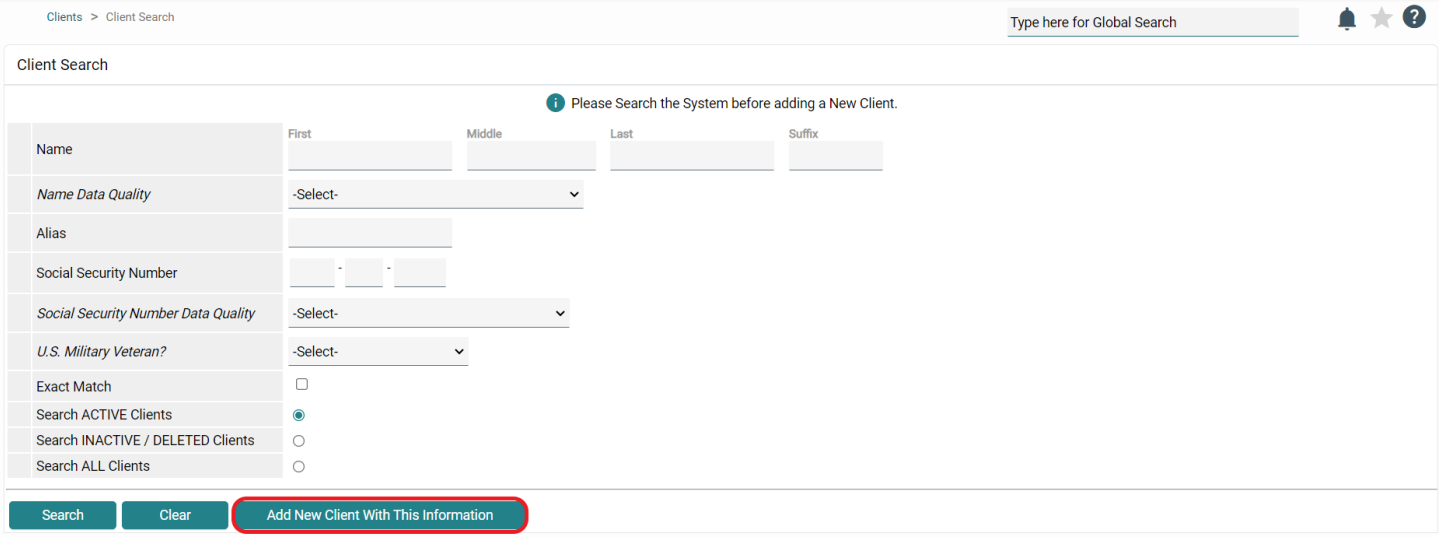
Click "Search" to return a list of possible matches. By clicking on the client's blue hyperlinked name or the pencil icon, you will be taken to the client's profile. If no matches are found, then you can create a new client record.



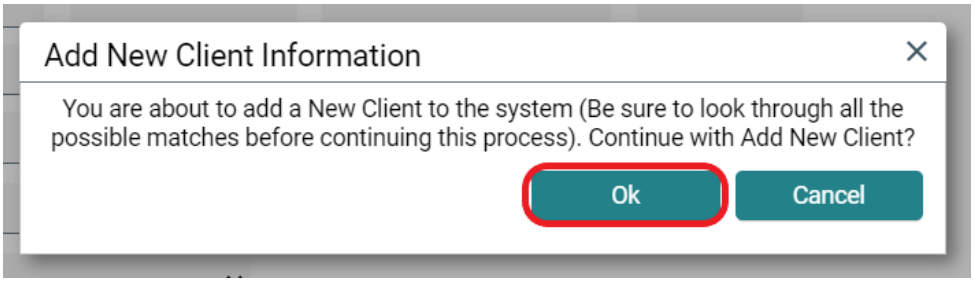
> **Helpful Hint:** Each client is assigned a Client ID number which is used when referencing the client. Never give out any personally identifiable information about clients.

Adding A New Client

When adding a new client to the system, ALWAYS search to verify that they are not already in the system. If no record exists, click on the "Add Client with This Information" button.



A warning will appear to make sure you have thoroughly searched for the client before opting to create a new record. To continue, click the "Ok" button.



Client Record

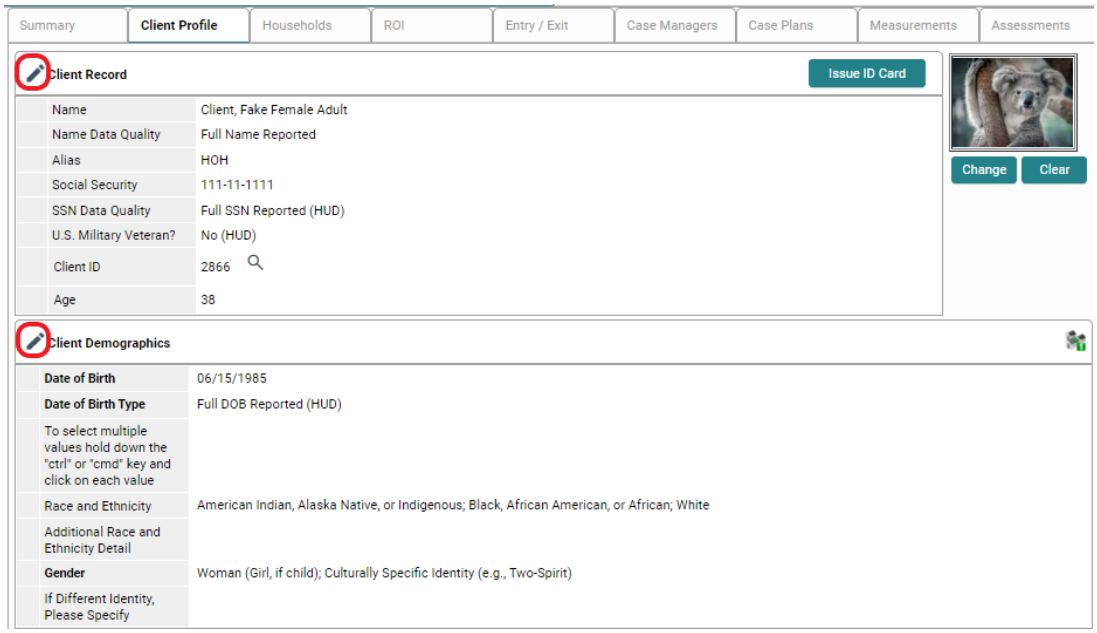
Client Records are like a virtual file for each person. The records contain various tabs to organize client data into the following categories:

- Client Information
  - Summary
  - Client Profile
  - Households
  - ROI
  - Entry/Exit
  - Case Managers
  - Case Plans
  - Measurements
  - Assessments
- Service Transactions
  - Add Need
  - Add Service
  - Add Multiple Services
  - Add Referrals
  - View Previous Service Transactions
  - View Shelter Stays
  - View Entire Service History

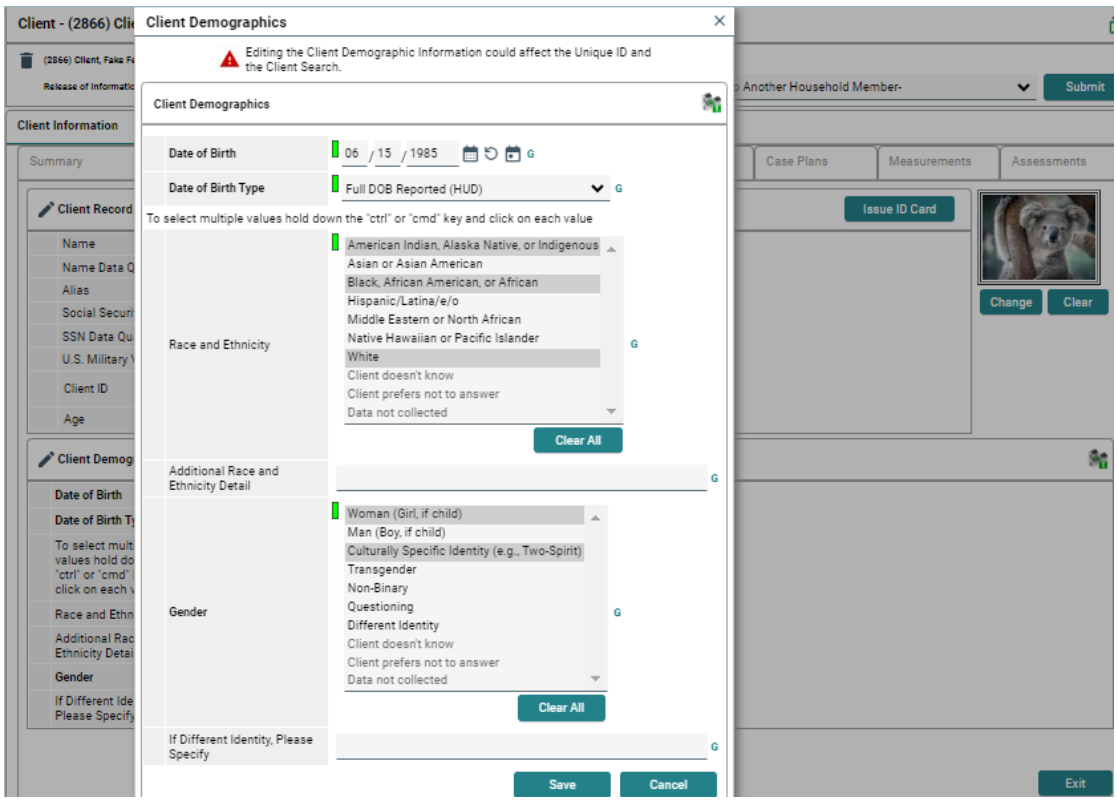
Client Profile

On the Client Profile screen, you will find some of the Universal Data Elements for the client such as *Name*, *Social Security Number, Veteran Status, Date of Birth, Race*, and *Ethnicity.*

To add or edit data, click the pencil icon next to **Client Record** and/or **Client Demographics**. For more information refer to the current *HMIS Data Standards Manual*.



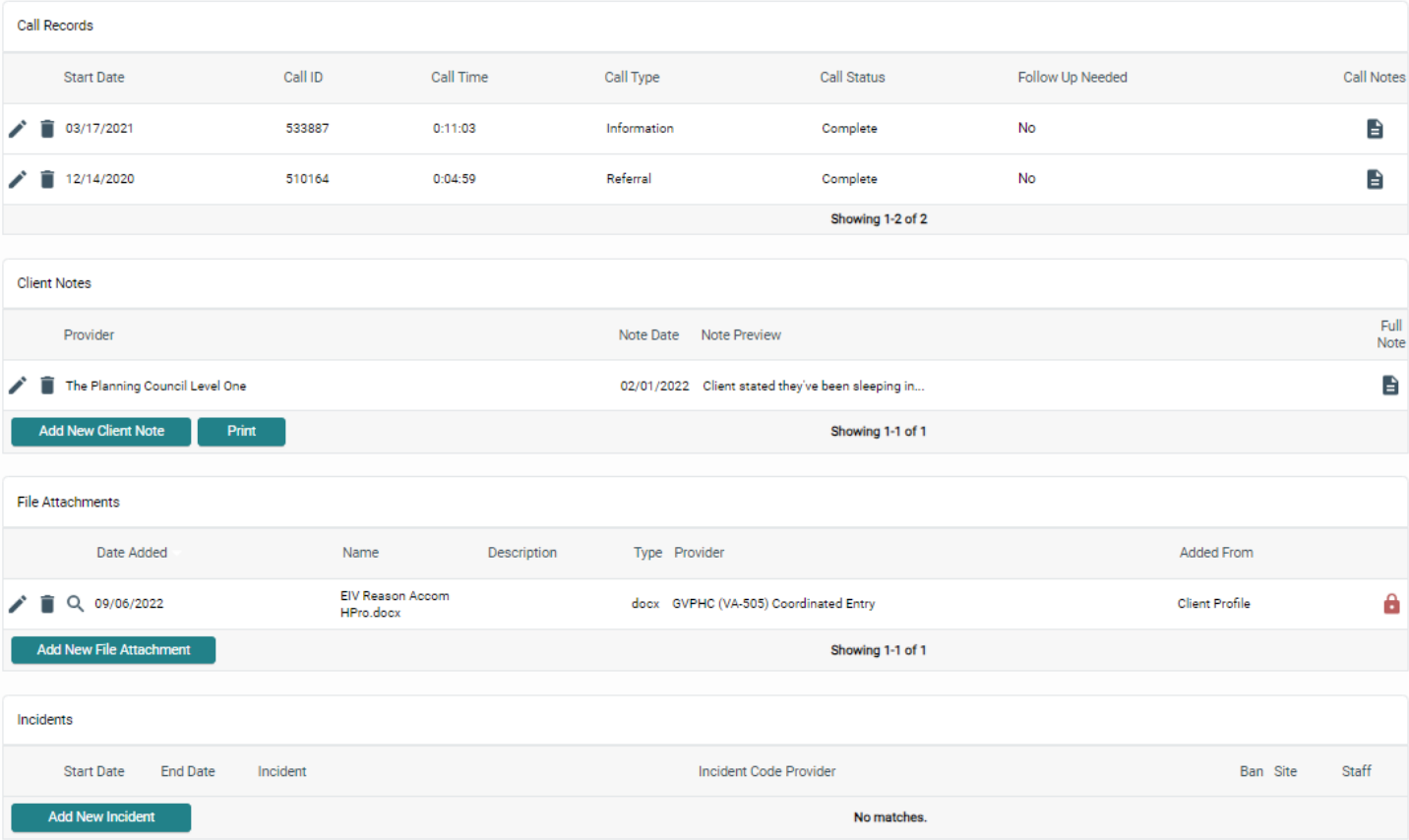
Once you click on the pencil icon, next to the section you wish to edit, the section's window will pop out for editing. Once you have finished entering data in each field, click *"Save"*.



> **Helpful Hint:** To select multiple Gender response options, hold down the "ctrl" key while clicking the appropriate response options.

As you scroll down the **Client Profile**, the following sections are also available:

- **Call Records** – Captures call records with various agencies such as the housing crisis hotline. To view Call Notes, click on the notepad icon
- **Clients Notes** – Notes meant to be shared with other agencies. Click the notepad icon to view.
- **File Attachments** – Allows you to upload files to the client's record. (e.g. ROIs and VI-SPDATs)
- **Incidents** – Captures a variety of events related to the client.



Households

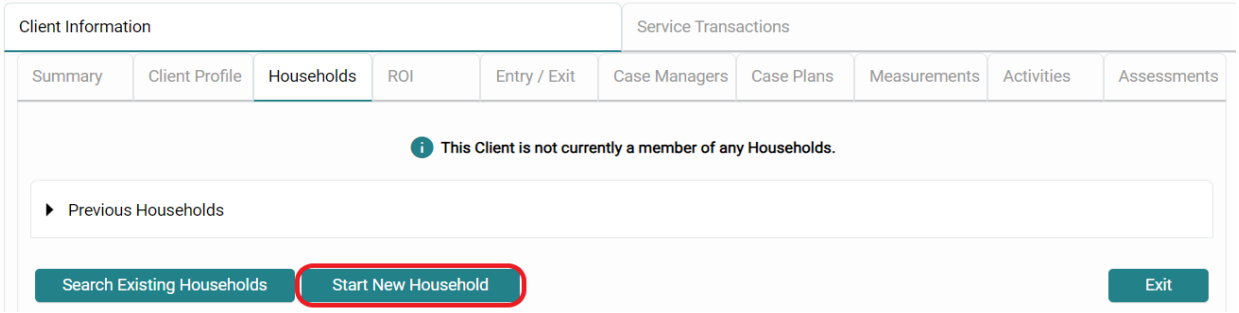
The **Households** tab represents the family unit. Households can vary from agency to agency depending on how the client presents themselves for services. In other words, a client may present as a single individual to Agency A, but then with their significant other or child to Agency B.

When creating a household, one member is designated as the Head of Household and the other members are identified by their relationship to the Head of Household.

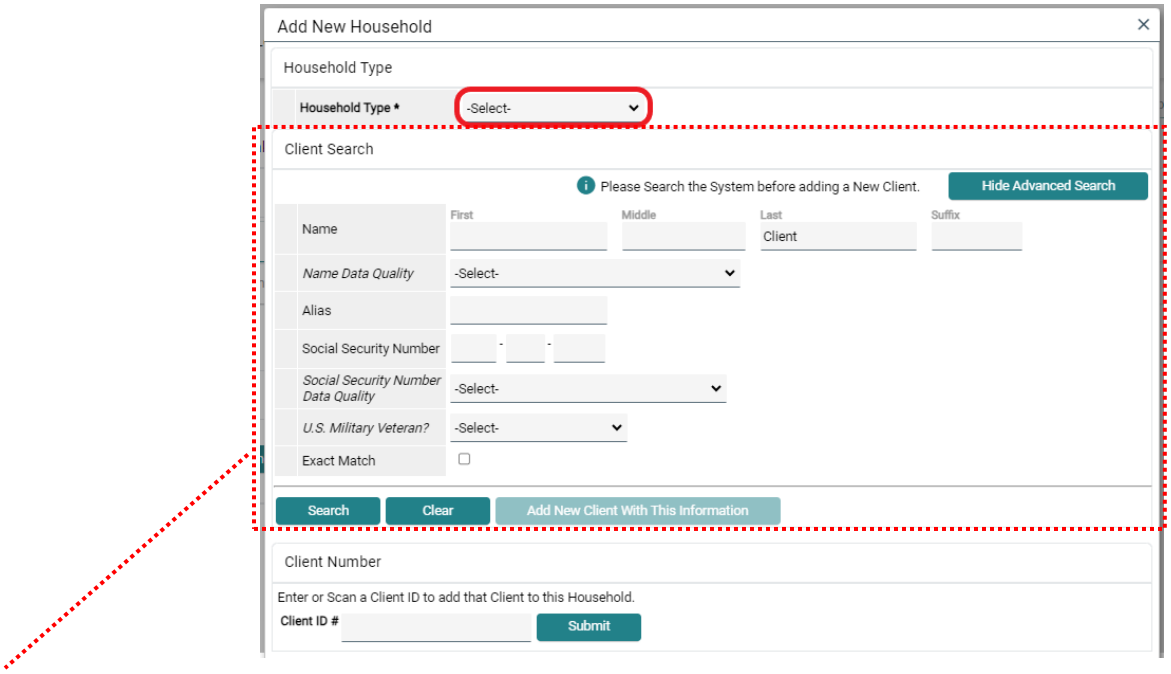
> Helpful Hint: Households must be created in order for clients to be grouped together in an Entry/Exit.

Creating a Household

To create a new Household, click the "Start New Household" button.

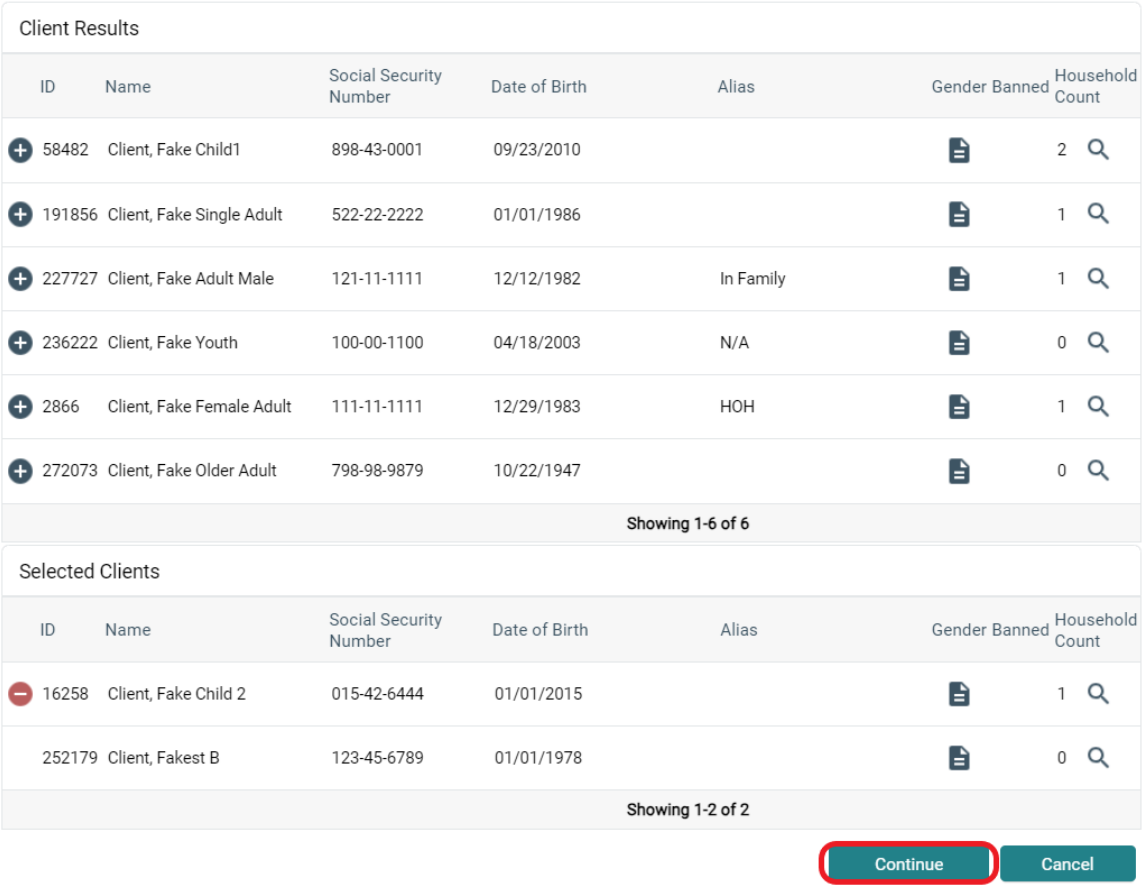


The Add New Household window will appear. Select the Household Type from the dropdown list.



The **Client Search** area allows you to search for additional household members if needed. The search can be done by name or **Client ID.**

If the additional household members are found in the search results, click the plus icon to add them to the household. Each client that you have added to the Household will appear at the bottom under **Selected Clients**.



Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
58482	Client, Fake Child1	898-43-0001	09/23/2010			2
191856	Client, Fake Single Adult	522-22-2222	01/01/1986			1
227727	Client, Fake Adult Male	121-11-1111	12/12/1982	In Family		1
236222	Client, Fake Youth	100-00-1100	04/18/2003	N/A		0
2866	Client, Fake Female Adult	111-11-1111	12/29/1983	HOH		1
272073	Client, Fake Older Adult	798-98-9879	10/22/1947			0

Showing 1-6 of 6

Selected Clients

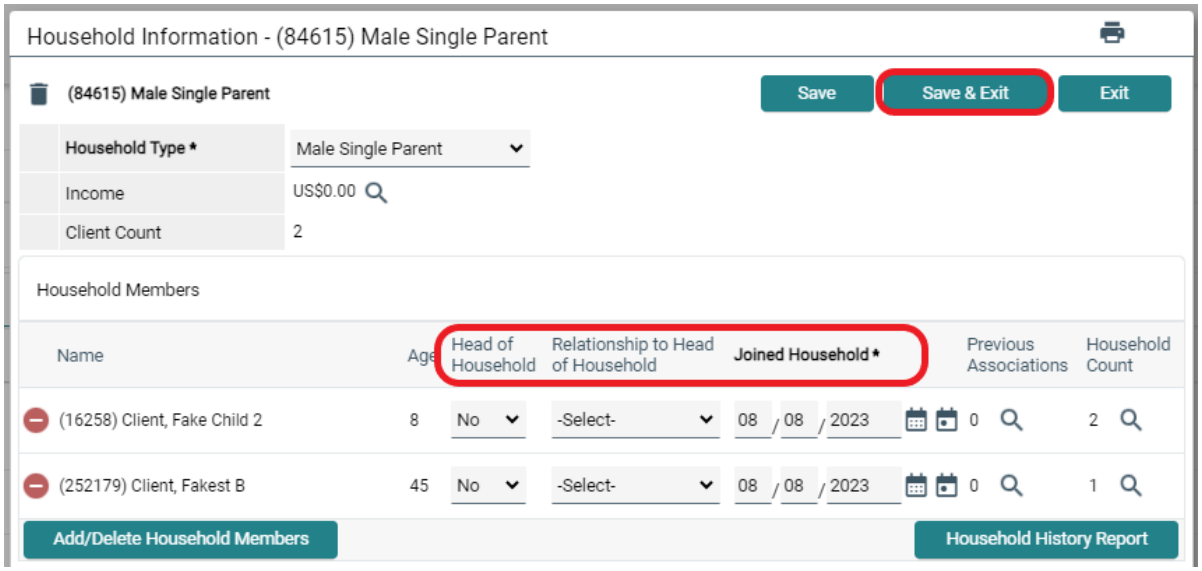
ID	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
16258	Client, Fake Child 2	015-42-6444	01/01/2015			1
252179	Client, Fakest B	123-45-6789	01/01/1978			0

Showing 1-2 of 2

Continue Cancel

Once all the household members have been selected, click “Continue”.

The **Household Information** window will appear with a unique household ID number.



To set the Head of Household: if this client is the **Head of Household**, select *Yes*; otherwise select *No*.

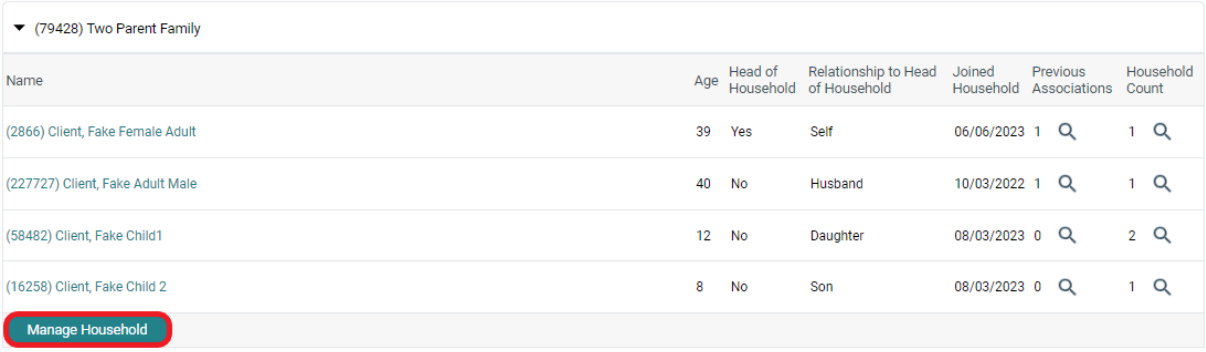
In the **Relationship to Head of Household** column, select the relationship from the dropdown list. If the client is the Head of Household, select Self (this is selected by default if there is a *Yes* in the **Head of Household** column).

Complete the **Joined Household*** column. The date entered should reflect the date the client(s) started working with your agency.

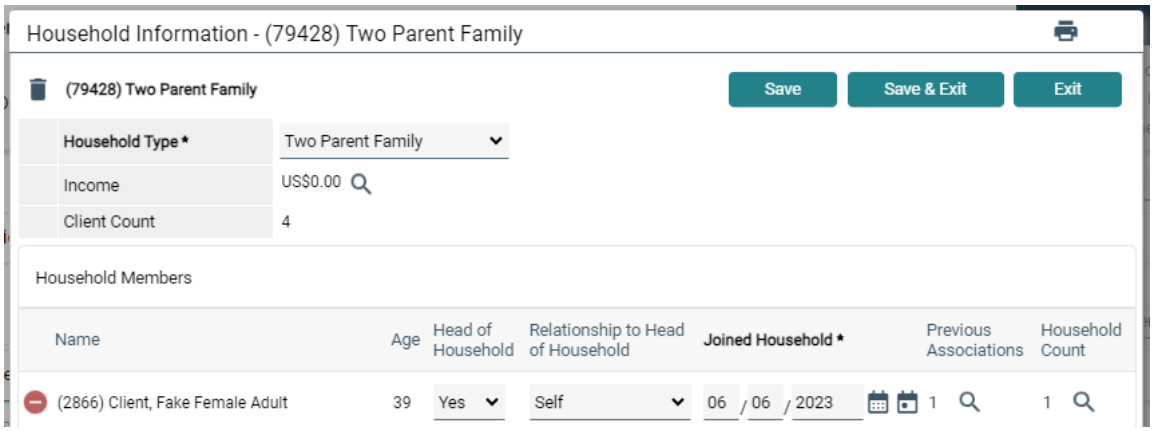
Click "Save & Exit" to confirm the household information. The **Household tab** will be displayed with the updated information.

Editing a Household

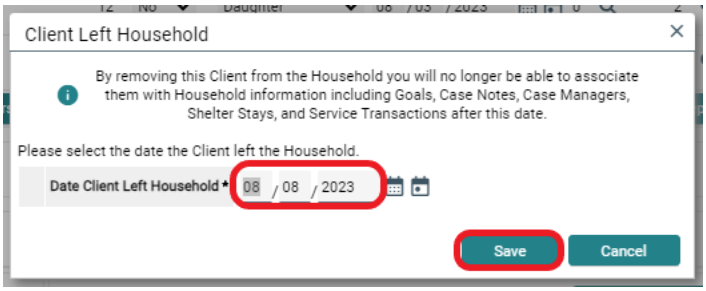
When viewing the **Households** tab, click "Manage Household" below the household that needs to be altered.

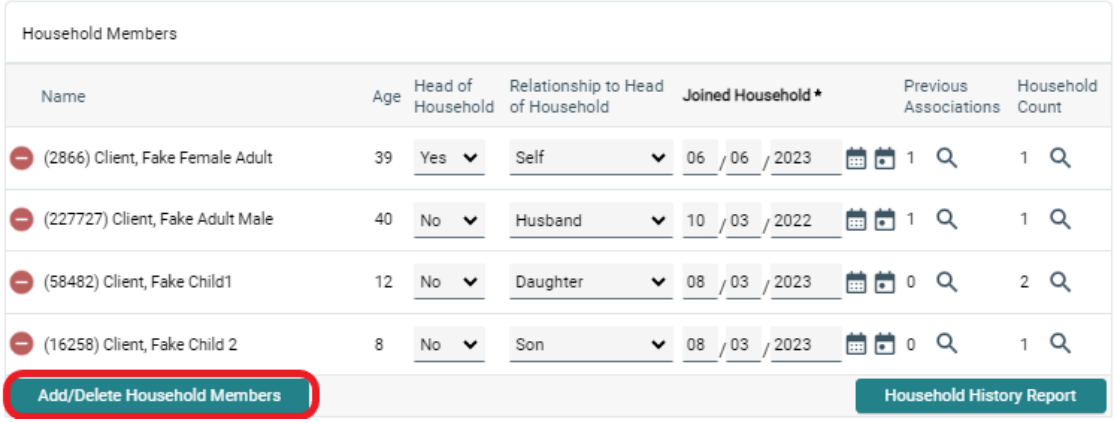


The **Household Information** window will appear.

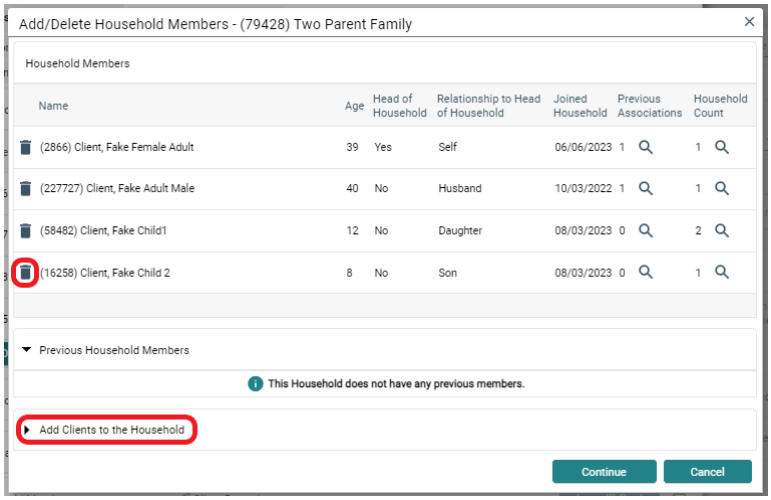


For household members that have left the household, click the red minus icon next to their name and Client ID. The **Client Left Household** window will appear. Complete the **Date Client Left Household*** field and click "Save".





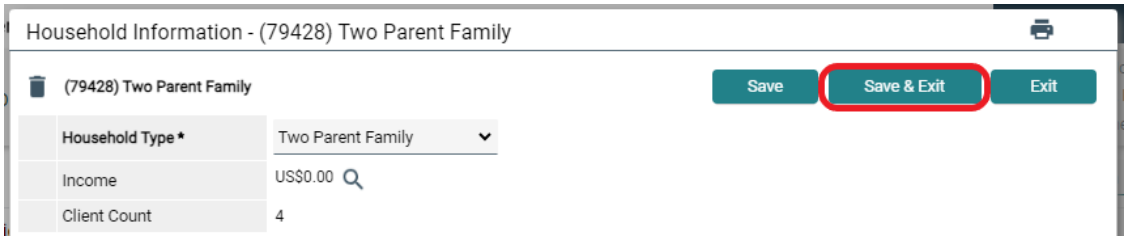
To add or delete household members, click the "Add/Delete Household Members" button. The **Add/Delete Household Members** window will appear.



To delete members that were added incorrectly, click the trash can icon next to their name and Client ID.

To add a new member, click the arrow next to **Add Clients to the Household** and search for the household member(s) to be added.

Click "Continue" at the bottom of the screen when you are done. This brings you back to the **Household Information** tab. If there are no additional edits, click "Save & Exit".

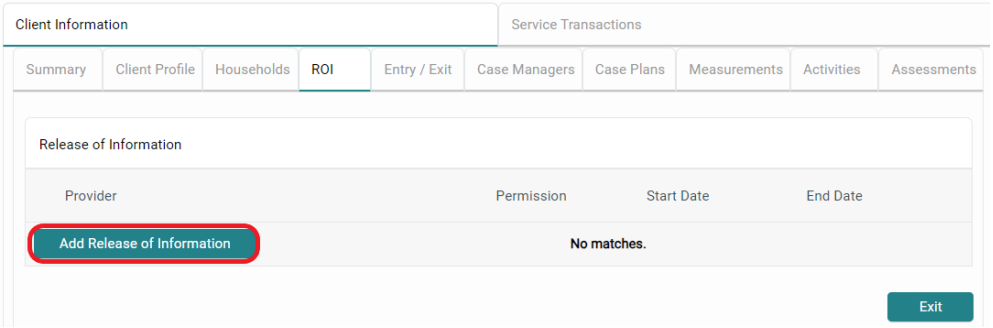


Release of Information (ROI)

The Release of Information grants or denies the sharing of the client's information with other HMIS participating agencies. This tab should reflect the client's signed *HMIS Release of Information* document. All ROIs have start and end dates. Data entered *on or between* the ROI's start and end dates will be visible to other providers.

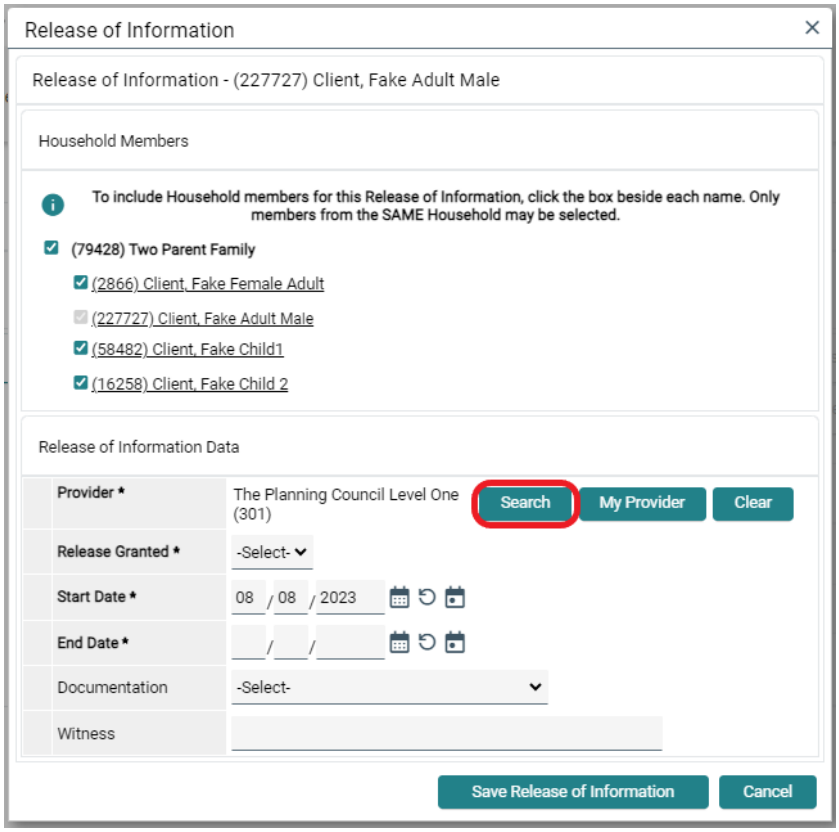
Adding a Release of Information

Click on the **ROI** tab inside a client's record. Click the "Add Release of Information" button.



The **Release of Information** window will be displayed.

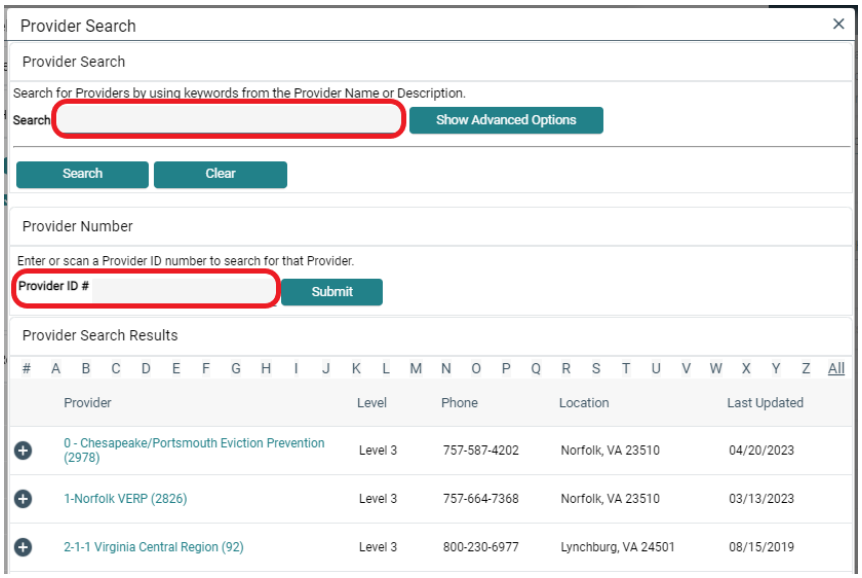
In the **Household Members** section, check the box next to each client listed on the ROI. Remember, all adults (18 years and older) are required to sign separate ROIs, but children can be included on their parent or guardians form.



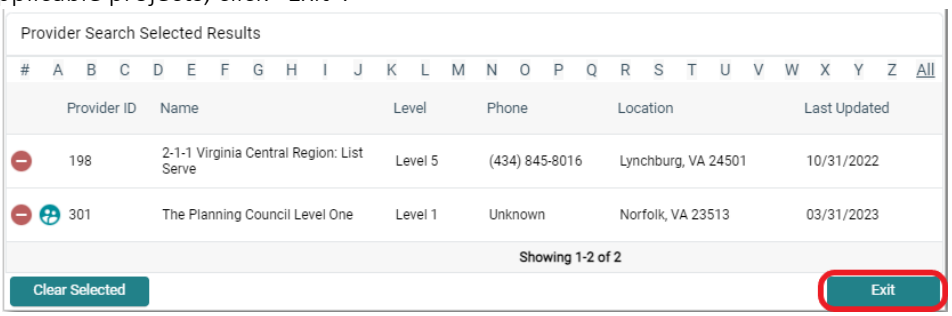
In the **Release of Information Data** section, the **Provider*** automatically defaults to the agency. Click "Search" to search for the project(s) the client(s) is being enrolled into.

> Helpful Hint: This is what we refer to as covering both agency and project-level data.

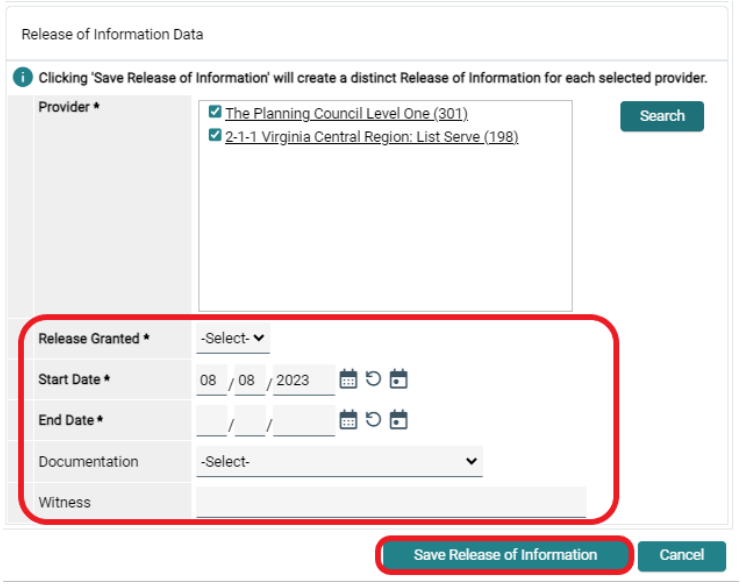
The **Provider Search** window will appear. Search by entering the name of the project, the **Provider ID number**, or by scrolling through the list of **Provider Search Results.**



Once the correct project has been located, select the plus icon to add to the **Provider Search Selected Results**. Once you have added all applicable projects, click "Exit".



The **Release of information Data** window will be displayed again. You should now see the agency and any selected project(s) listed in the **Provider*** section.



- **Release Granted** - indicate the *Yes* or *No* answer by using the drop-down
- **Start Date*** - should match the date of the signature on the form
- **End Date*** - Verbal ROIs are valid for 1 year and written ROIs are valid for 3 years from the Start Date
- Documentation - gives options to indicate the type of documentation (e.g. *Signed statement from client*)
- Witness – is an optional section where you can input the initials of a staff member that witnessed the provision of the ROI.

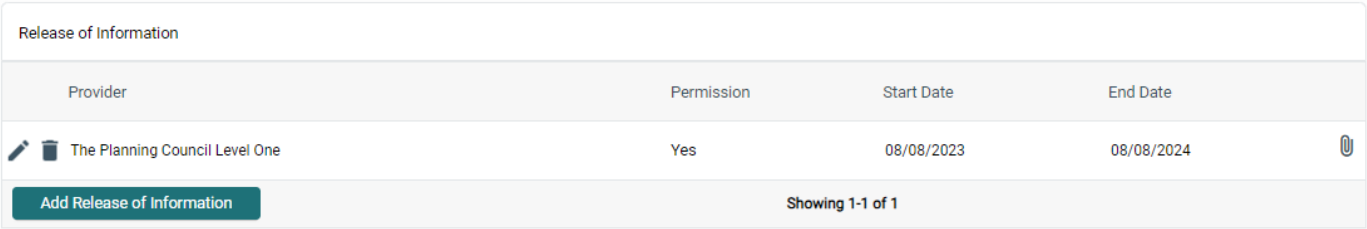
Once all the information has been completed, click "Save Release of Information".

The **ROI** tab will be displayed. You will see the multiple levels (agency and project(s)) of ROI for the client.

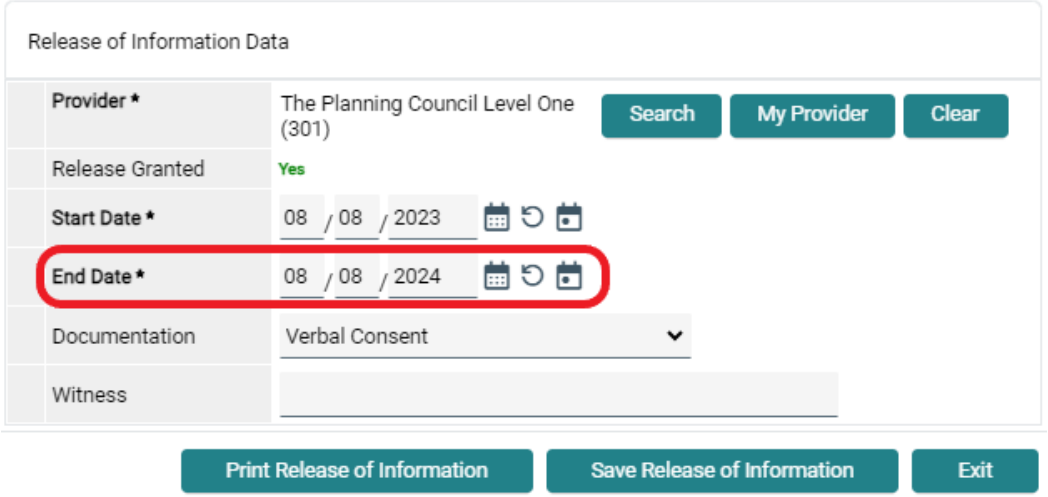
Updating a Release of Information

In HMIS a client may have more than one ROI, which can cause visibility issues when not entered correctly. Regardless of newest entry, an ROI with a permission of "Yes" will supersede a permission of "No" when both responses overlap. To avoid this issue, the previous permission must be updated in order for the denied ROI to be put into effect.

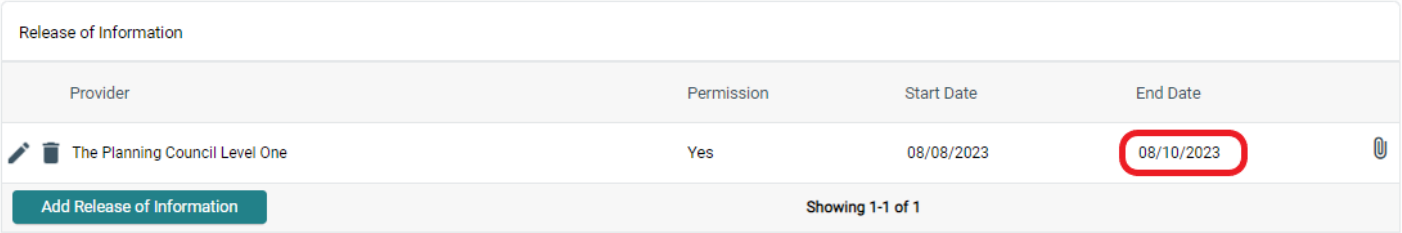
Click on the **ROI** tab inside a client's record. Click the pencil icon next to the ROI that needs to be updated.



The **Release of Information** window will be displayed with the current ROI information. You will need to edit the end date to the date the client stated they no longer want to give permission for their information to be shared.



Once the new end date has been entered click "Save Release of Information" and you will see the new end date reflected on the ROI.

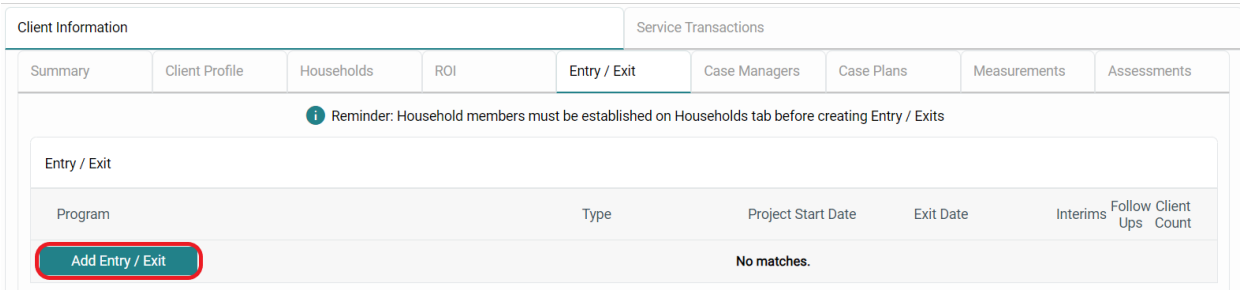


Entry/Exit

An Entry/Exit is a record of the client's participation in a project. An Entry/Exit is needed for every project the client is participating in, and it should include all members of the household that are being served.

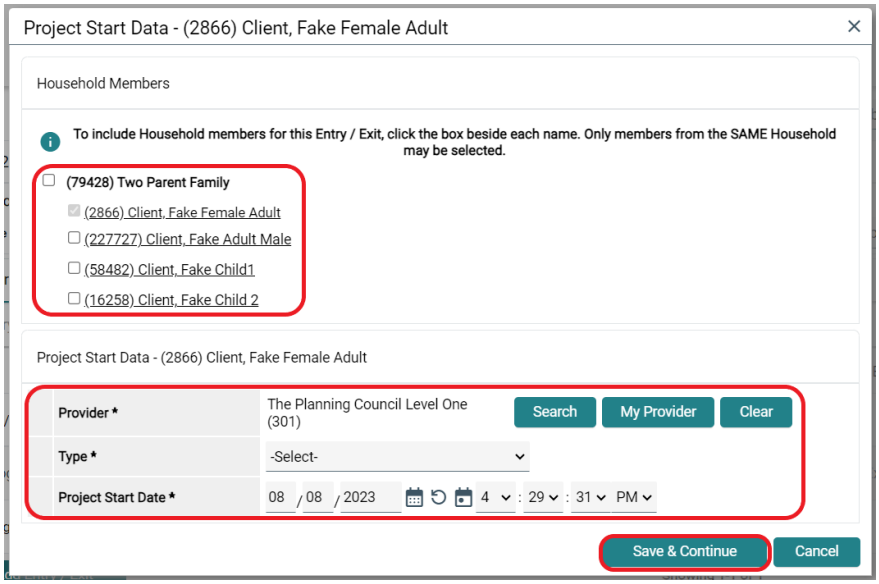
Creating a Project Entry

Click on the **Entry/Exit** tab inside of a client record.



Click the "Add Entry/Exit" button. The **Project Start Data** window will appear.

Indicate the household member(s) being served by checking the box next to each client as applicable.



Change the **Provider*** to the correct project by using the dropdown menu.

If you don't have a dropdown menu, you will have a "Search" button (as shown in the screenshot above - this occurs when you have a large number of projects to choose from). After clicking "Search", a Provider Search window will be displayed. Search for the appropriate project using the same steps described in the Adding a Release of Information section.

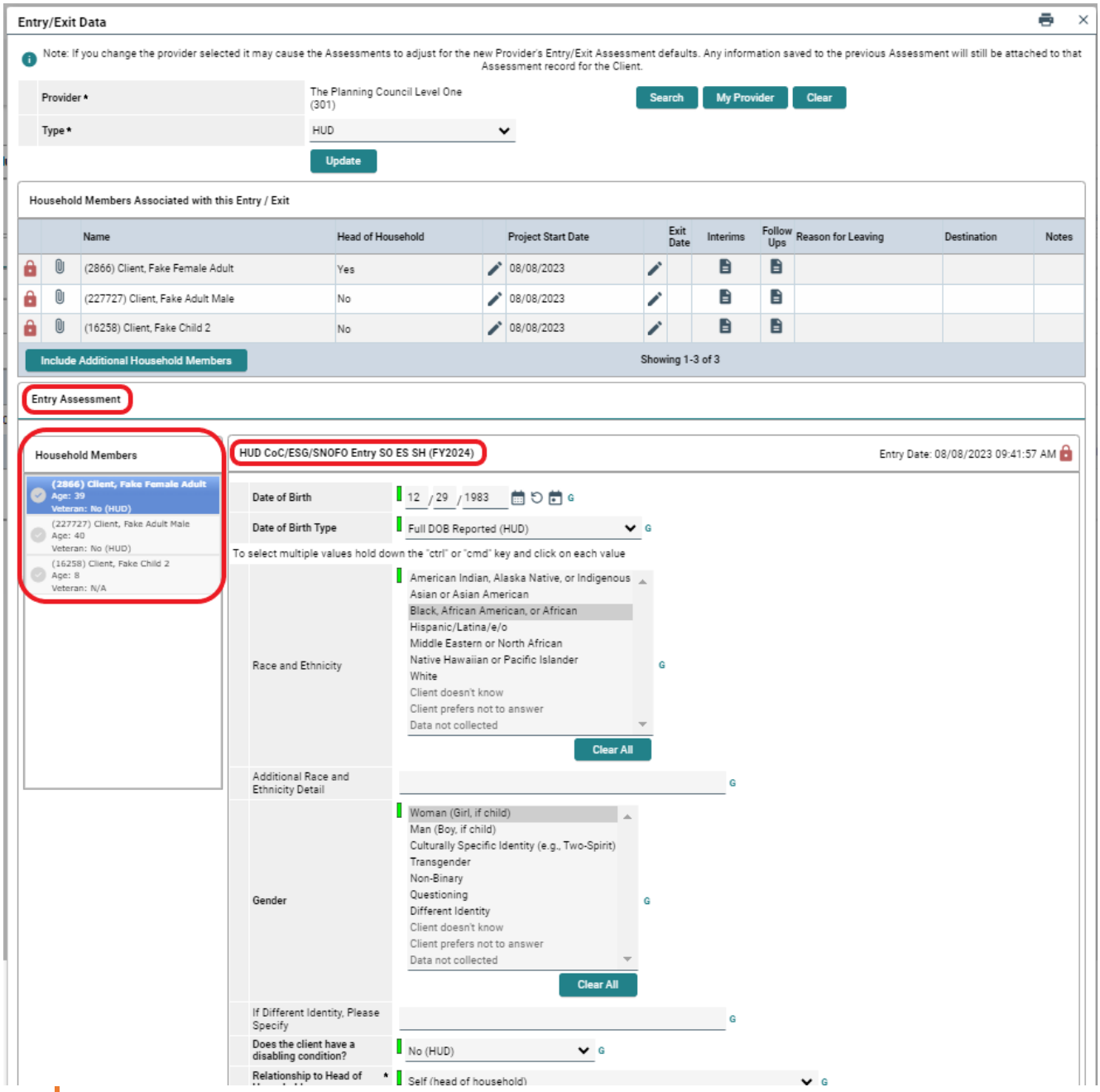
Select the **Type*** that applies to the project. If you are unsure what Entry Type applies to your given project(s), contact a System Administrator for assistance.

Project Start Date* is the date the client was admitted into the project.

The *Calendar* button allows you to view a calendar to select the date. The circle with an arrow allows you to clear the date. The *Calendar* with a dot selects the current date automatically.

Click "Save and Continue" once all fields are complete.

The **Entry/Exit Data** window will appear.

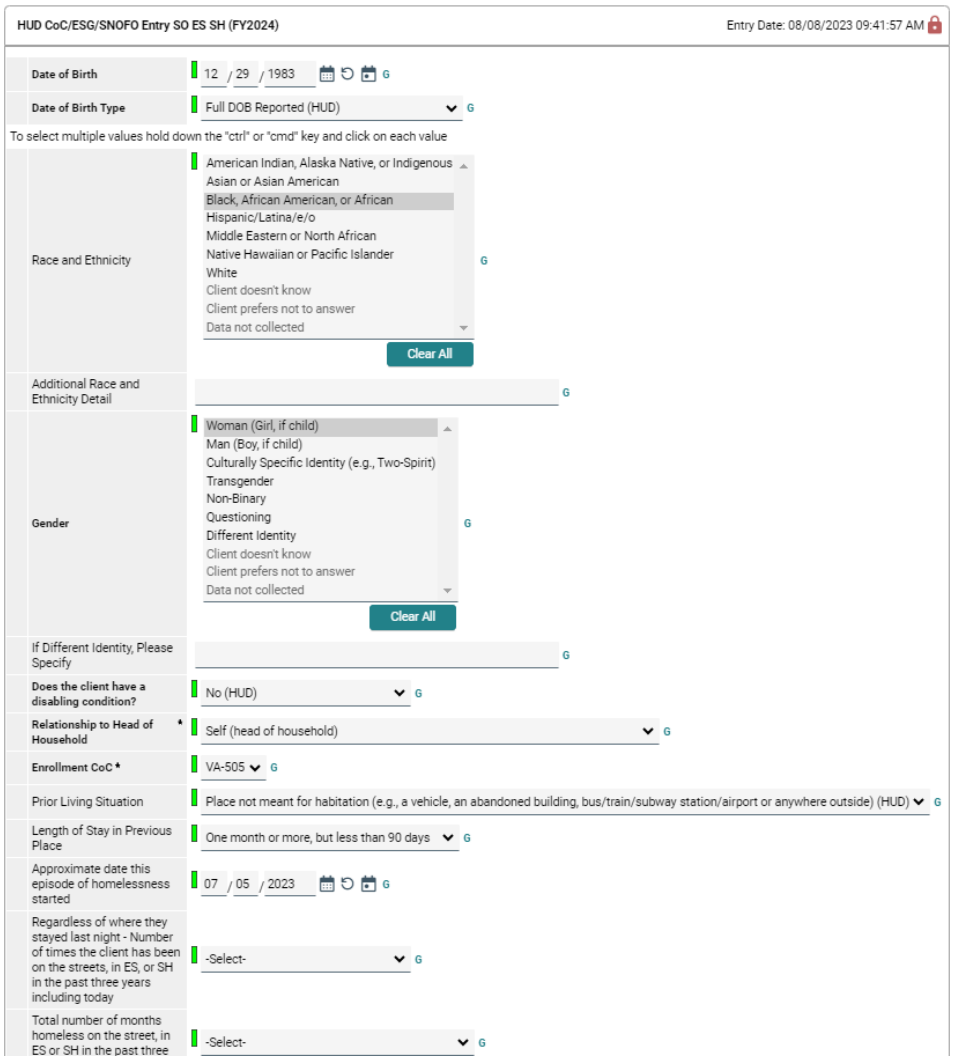


> Helpful Hint: The Entry Assessment must be completed for each client(s) in the household. You can click on the client names under the **Household Members** section to fill out the assessment for each participant. The **bold** elements are required to be completed for every client. The non-bold elements are only required for adults (age 18 and up).

The **Entry Assessment** may vary depending on the data collection requirements determined by the project's funding source and/or project type. In the screenshot above, the **Entry Assessment** assigned is titled **HUD CoC/ESG/SNOFO Entry SO ES SH (FY2024).** This indicates it aligns with the HUD CoC & ESG funding source requirements for Emergency Shelter (ES), Street Outreach (SO) and Safe Haven (SH) project types. The year indicates which data standards version the assessment aligns with.

Universal Data Elements

HMIS Universal Data Elements are elements required to be collected by all projects participating in HMIS. As you review the Entry Assessment, you will need to verify the information is accurate, make updates, and fill in any blanks.



> Helpful Hint: Refer to the HMIS Data Standards Manual for more information on data element definitions and collection requirements.

The screenshot above contains Universal Data Elements. Here are some important notes for a few of those:

Race and Ethnicity – Multiple response options may now be selected for this data element. To select more than one response option, hold the "ctrl" key while clicking on the appropriate response options.

Gender – Multiple response options may now be selected for this data element. To select more than one response option, hold the "ctrl" key while clicking on the appropriate response options.

Relationship to Head of Household – There must be at least one, but not more than one, Head of Household for each enrollment. Heads of Household may be alternatively thought of as the "primary client", the "eligible individual" etc., rather than as a fixed designation.

Enrollment CoC* – This response should correlate to the **CoC Code** in which the client resides.

- VA-501 – SVHC: Cities of Chesapeake, Franklin, Norfolk, Suffolk; Counties of Isle of Wight & Southampton
- VA-503 – BEACH: City of Virginia Beach
- VA-505 – GVPHC: Cities of Hampton, Newport News, Poquoson, Williamsburg; Counties of York & James City
- VA-507 – PHAC: City of Portsmouth
- VA-508 – Central Virginia: City of Lynchburg; Counties of Amherst, Appomattox, Bedford, & Campbell

Prior Living Situation – Commonly phrased to the client as "where did you sleep last night" – responses are broken down by category of *Homeless Situations*, *Institutional Situation*, *Temporary and Permanent Housing Situations* and *Other*.

If the client is literally homeless (as determined by their **Prior Living Situation** and **Length of Stay in Previous Place**) the three following fields will be present:

> **Approximate date this episode of homelessness started –** This should be the date the client's current episode of homelessness started. This is not based on the client's first time ever becoming homeless.
>
> **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 should equal the number of separate homeless episodes the client has had in the past three years, to include their current episode.
>
> **Total number of months homeless on the street, in ES or SH in the past three years –** This should equal the combined total number of months that a client has spent homeless in the past three years. For example, if a client reported two episodes of homelessness, and one episode lasted for 3 months while the other lasted 6 months, their total number of months would be 9.

> Helpful Hint: Conditional logic is what allows fields to appear or to be hidden based on data entry. Conditional logic does not occur for Emergency Shelters, Street Outreach and Safe Haven project types.

If your project is using a Universal Data Elements (UDE) Entry Assessment, the questions will end here. Other assessments will continue to include Program Specific Data Elements as required by the project's funding source. The screenshots below will be based on the 2024 HUD CoC & ESG requirements (the most used assessment in the HMIS).

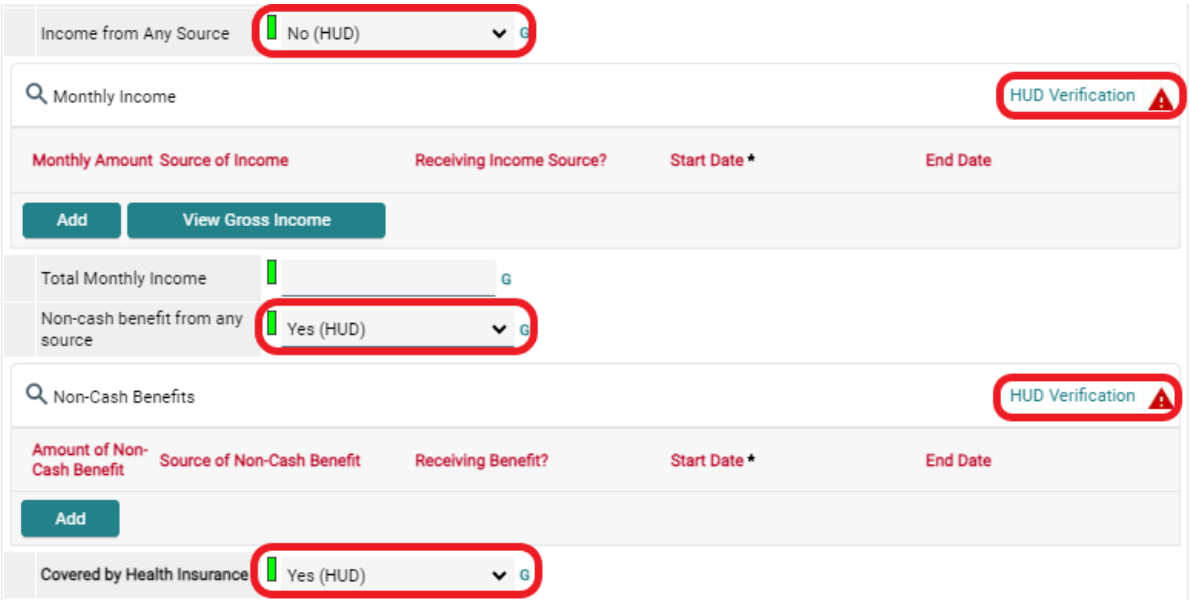
Program Specific Data Elements

The Program Specific Data Elements outlined below are required for all CoC and ESG funded projects. As you review the Entry Assessment, you will need to verify the information is accurate, make updates, and fill in any blanks.

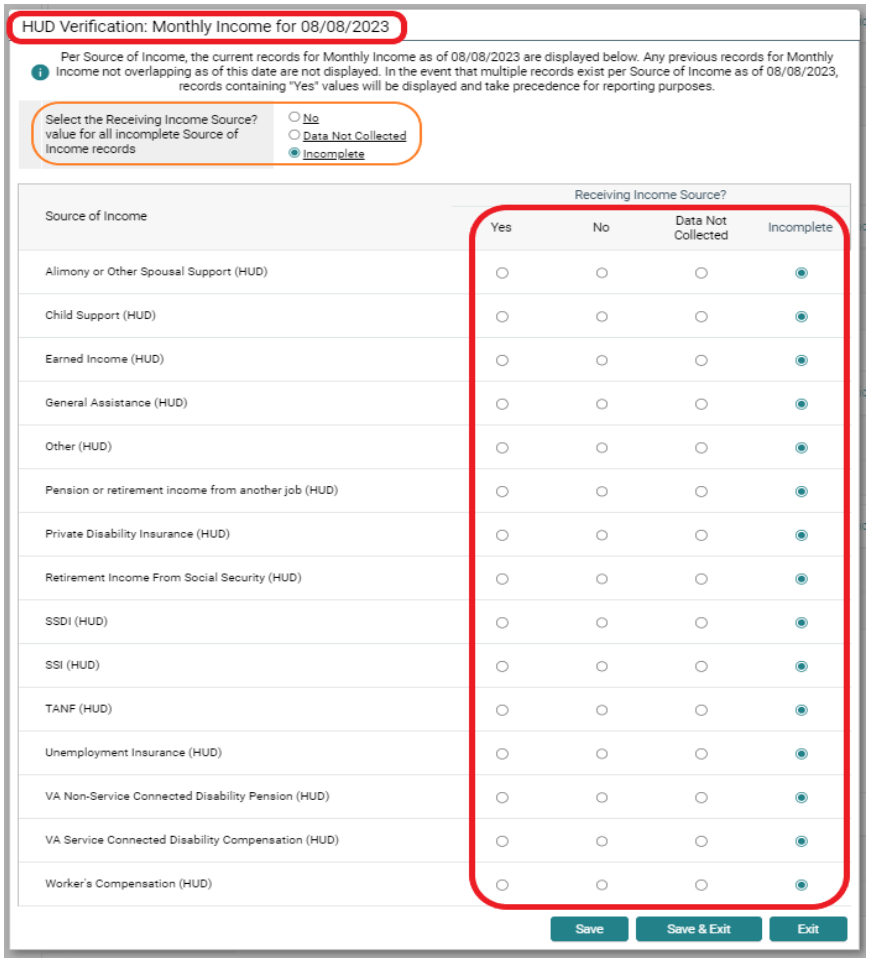
> Helpful Hint: Refer to the *HMIS Data Standards Manual* for more information on data element definitions and collection requirements.

Monthly Income, **Non-Cash Benefits**, **Health Insurance** and **Disabilities** are recorded through sub-assessments. Sub-assessments are used when a question could yield multiple answers. For example, you may have multiple sources of Income or Non-Cash Benefits. Each Sub-Assessments has a HUD Verification icon that allows for data entry.

To complete these sections, first answer the yes/no questions and then, click on the HUD Verification icon.

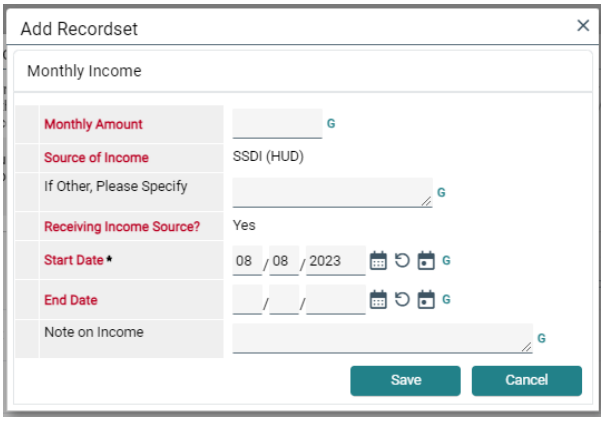


The **HUD Verification** window will appear. Select **Yes** or **No** for each source/type.



> Helpful Hint: The response options listed at the very top of the screen (circled in orange in the screenshot above) will assign that selection to each of the sources/types that are currently Incomplete. This saves you from assigning the same answer to every source separately.

If you select *Yes* for a **Monthly Income** source and/or **Disabilities** type, another window will appear that is titled **Add Recordset**. Be sure to complete the fields in these additional windows as shown below.



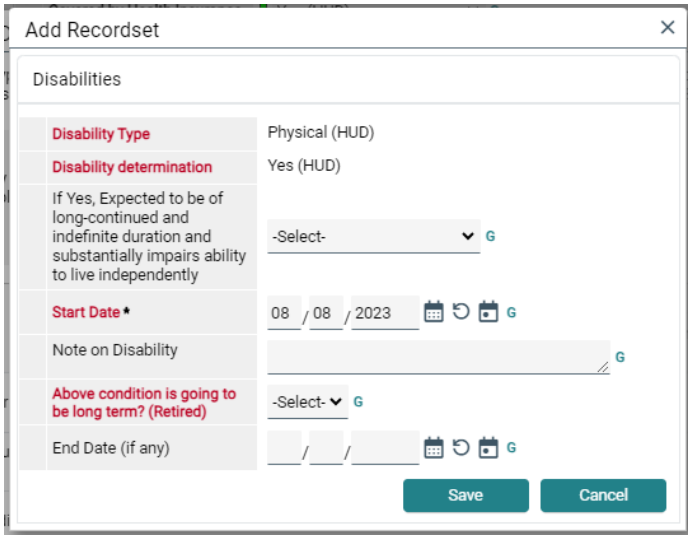
Monthly Income

Monthly Amount should equal monthly gross income that is received from the selected source. A child's income should be included on the Head of Household's record.

Start Date should equal the Project Start Date. Do not change this date to be prior to the Project Start Date.

The **End Date** should be left blank.

Click "Save" and you will be returned to the **HUD Verification** window.



Disabilities

If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently – a response of *yes* is what makes this condition a **Disabling Condition.**

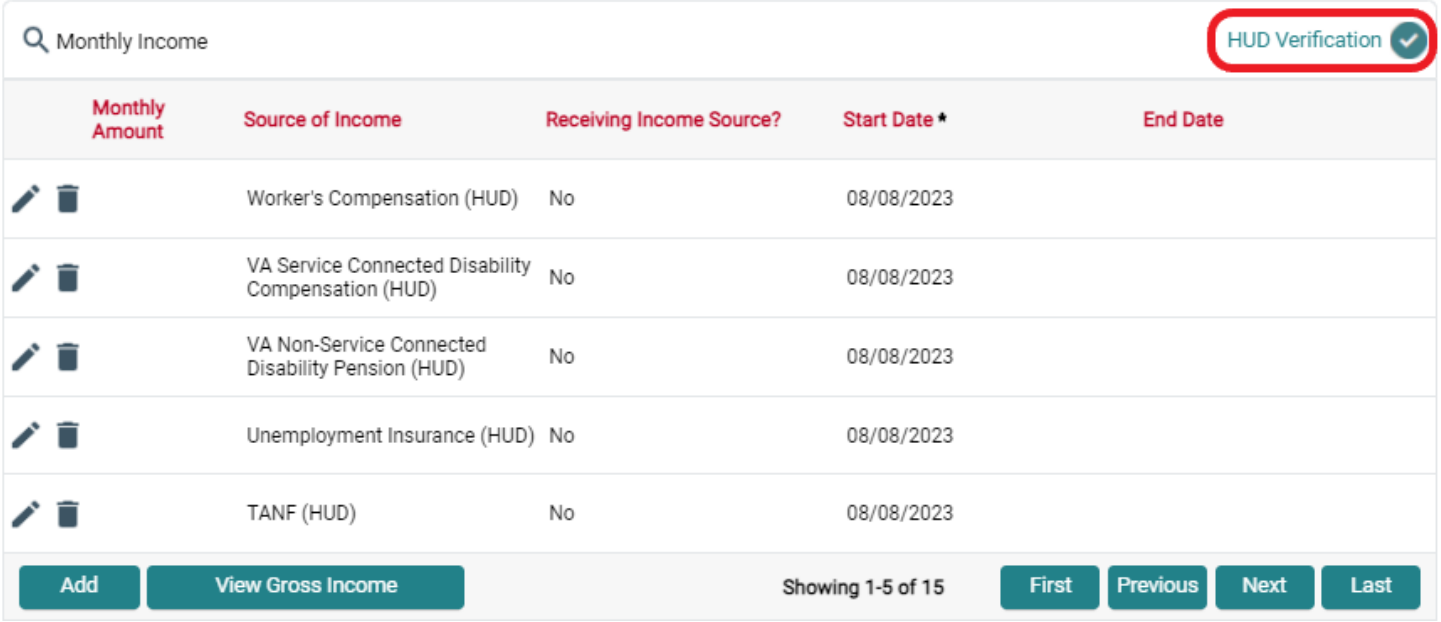
Start Date should equal the Project Start Date. Do not change this date to be prior to the Project Start Date

The **End Date** should be left blank.

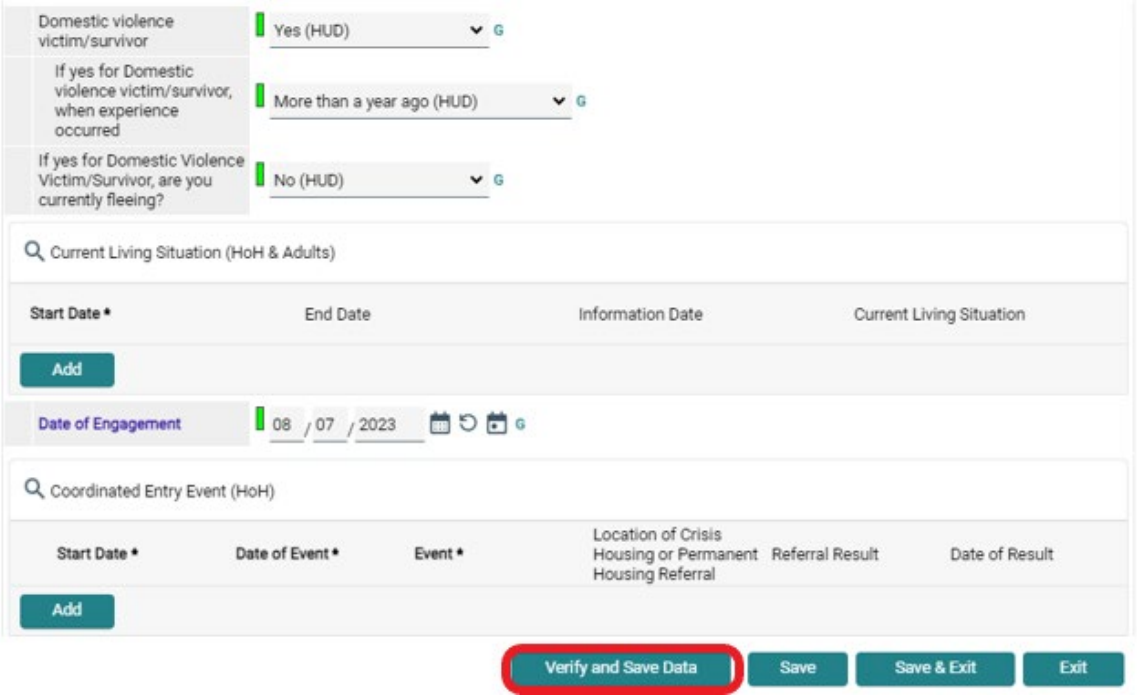
Click "Save" and you will be returned to the **HUD Verification** window.

Once all types and sources have the correct response option, click "Save & Exit" at the bottom of the window.

This will return you to the Entry Assessment. You will notice a checkmark next to the HUD Verification icon if all sources/types have a valid response option.



The last **Program Specific Data Elements** on the HUD CoC & ESG Entry Assessment are found in the screenshot below.



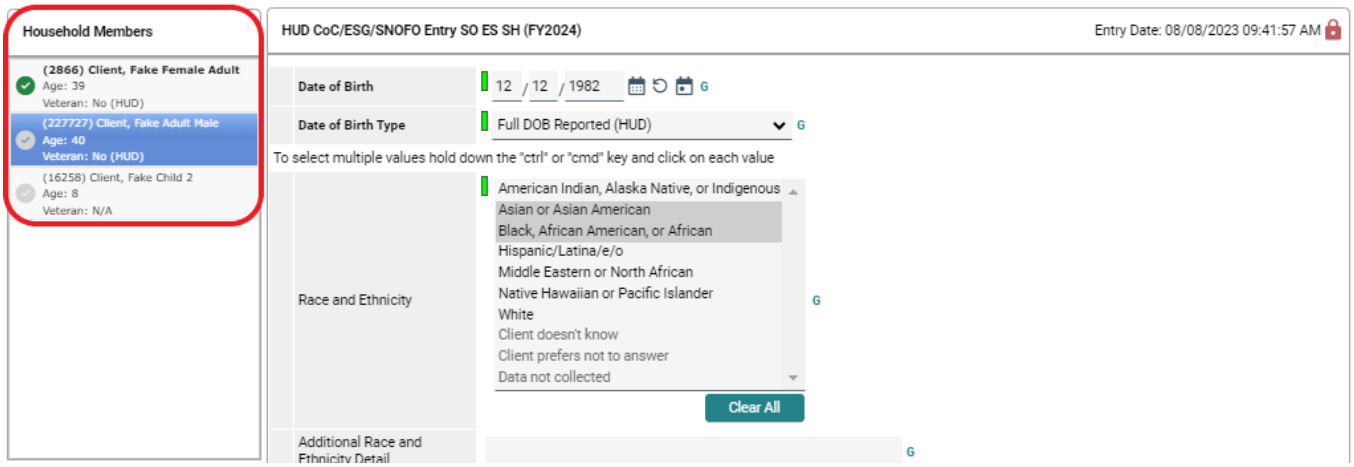
Current Living Situation only applies to Street Outreach projects and the universal CoC Coordinated Entry projects. This does not need to be completed inside of any other project entries.

Date of Engagement only applies to Street Outreach project types. This field should represent the date a deliberate client relationship is formed (i.e. the client has agreed to receiving services through the project and a full assessment will now be completed). Street Outreach projects are held accountable for data quality standards on all engaged clients. This date may occur on or after Project Start but cannot occur after Project Exit. If the client is not engaged at the point of Project Start, this field should be left blank.

Coordinated Entry Event only applies to the universal CoC Coordinated Entry projects. This does not need to be completed inside of any other project entries

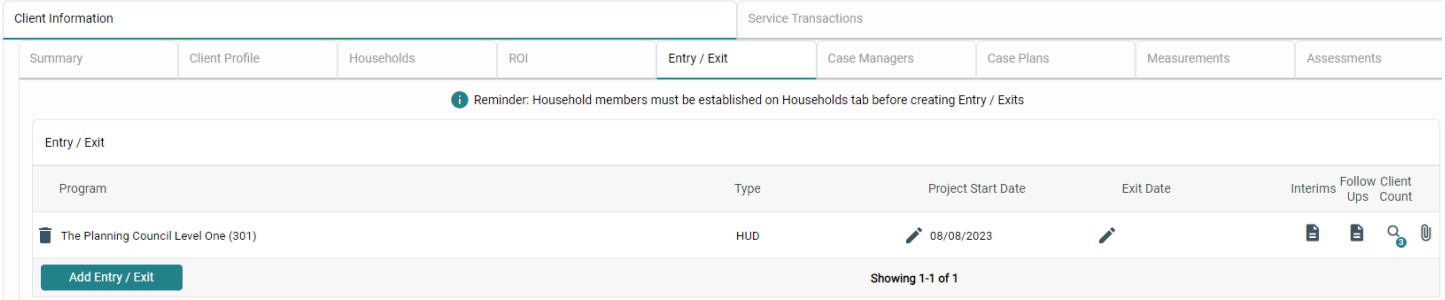
Click "Verify & Save Data" at the bottom of the screen.

REMEMBER, if there are multiple household members, scroll back up and complete the Entry Assessment for each household member listed in the **Household Members** section on the left. A green checkmark will be visible next the household members that have been completed.



Once all household members assessments have been completed, click “Save & Exit” on the bottom right-hand side of the screen.

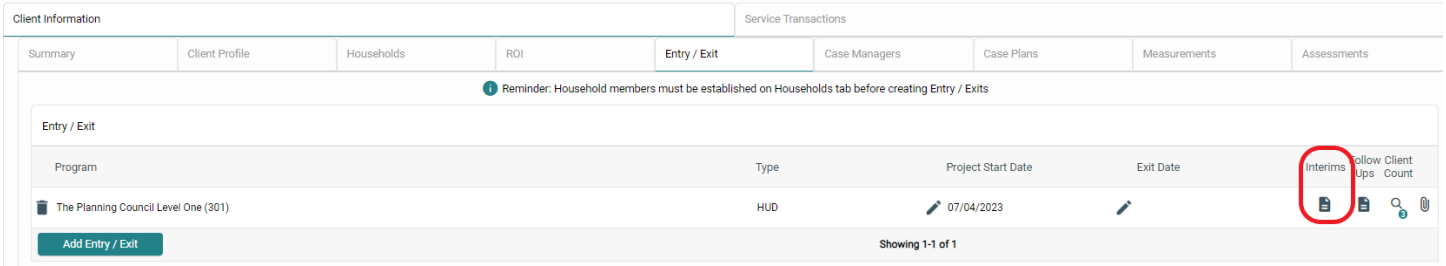
This returns you to the **Entry/Exit** tab, and you will see the Entry/Exit record that you just created.



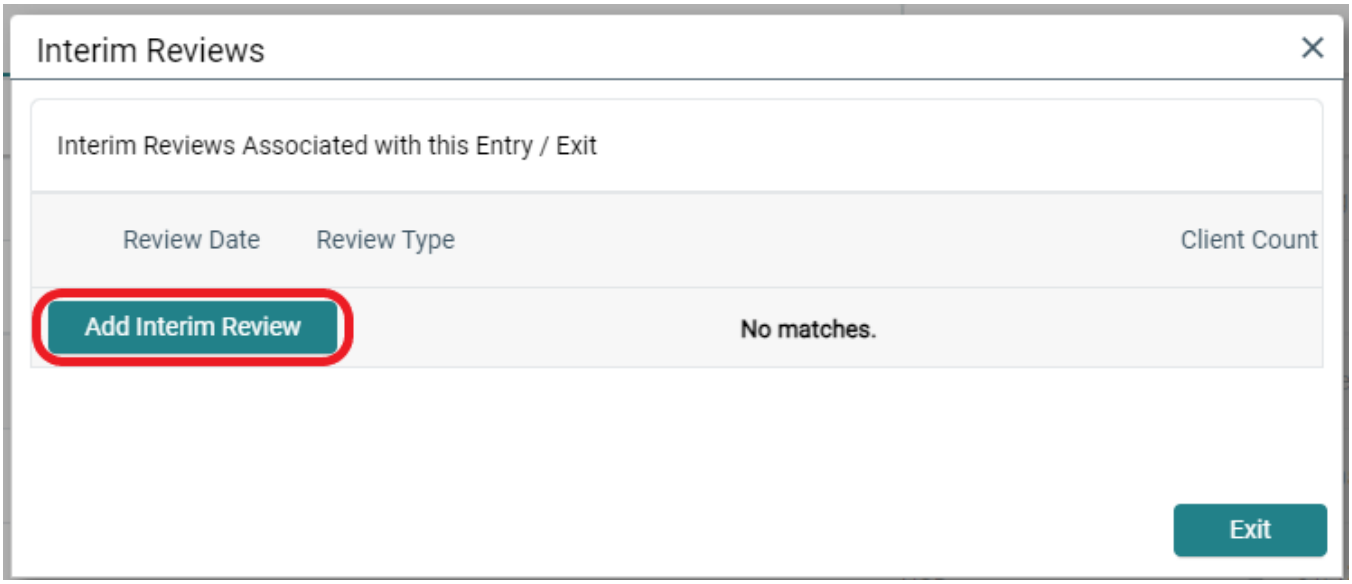
Interims

Interims allow you to record updates to client information that occur after the Project Start Date. Clients are required to have an Interim recorded every 365 days. These are called Annual Assessments and should occur in alignment with the clients Project Start Date (or within a 30+/- day window).

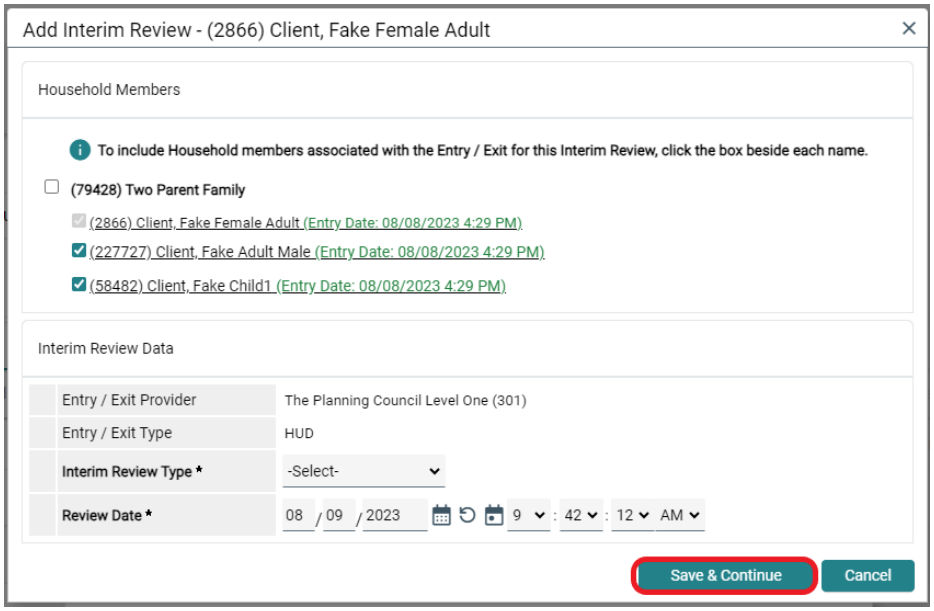
To create an Interim locate the applicable **Entry/Exit** record on the **Entry/Exit** tab. Click the **Interims** icon on that record line.



The Interim Reviews window will appear. From here, you can view existing interims, or create new interims. Click the “Add Interim Review” button.



The **Add Interim Review** window will appear.

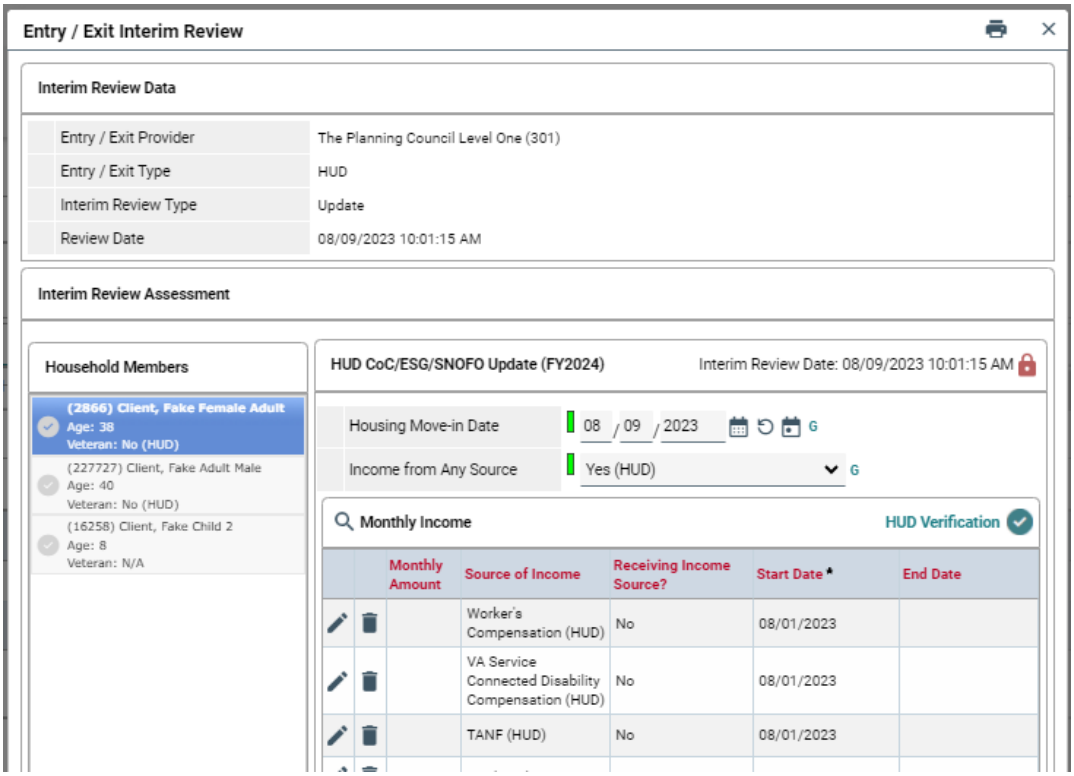


Be sure to select all household members.

Interim Review Type* - *Update* should be used to record general updates that occur over time. *Annual Assessment* should be used to record the required Annual Assessment. The other options do not apply at this time (unless your grant specifically requires it). Contact a System Administrator if you are unsure.

Review Date* - this should be the date the Update or Annual Assessment occurred.

Click "Save & Continue".

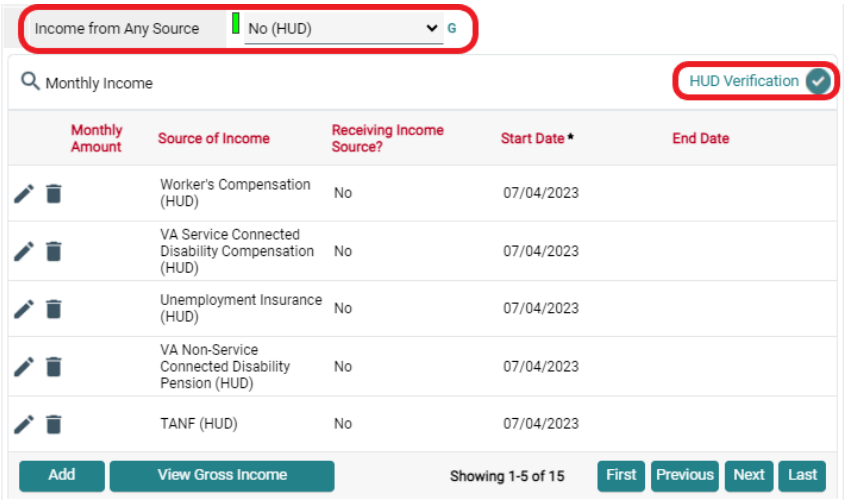


The **Entry/Exit Interim Review** window will appear. Scroll through the assessment to make edits to the client(s) information wherever necessary.

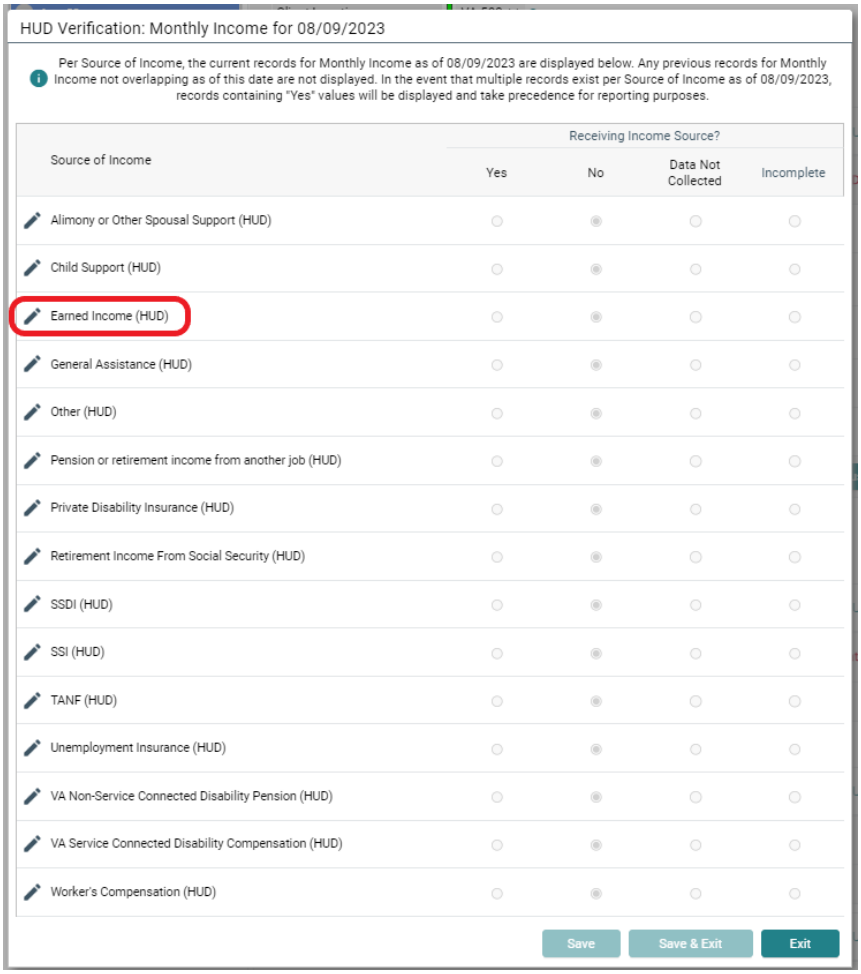
Updating a Sub-Assessment

Updating sub-assessments requires a few extra steps compared to the other data elements. Remember, sub-assessments are used to record **Monthly Income, Non-Cash Benefits, Health Insurance,** and **Disabilities**. Below is an example on how to update **Monthly Income.**

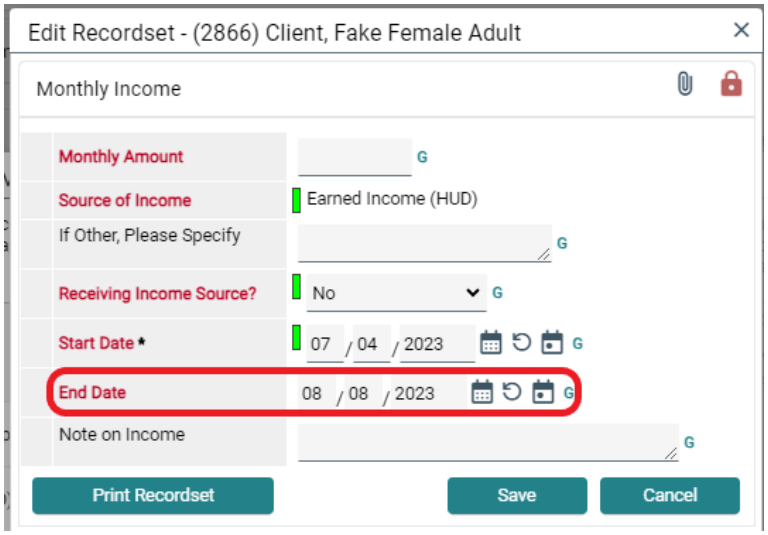
If the client no longer has a source of income or if the income source has changed, scroll down to the **Monthly income** section. Be sure the *Income from Any Source* yes/no question reflects the update (simply change the response using the dropdown menu if needed) and then click the HUD Verification icon.



The **HUD Verification** window will appear. From here, locate the source of income that needs to be updated and click the pencil icon.

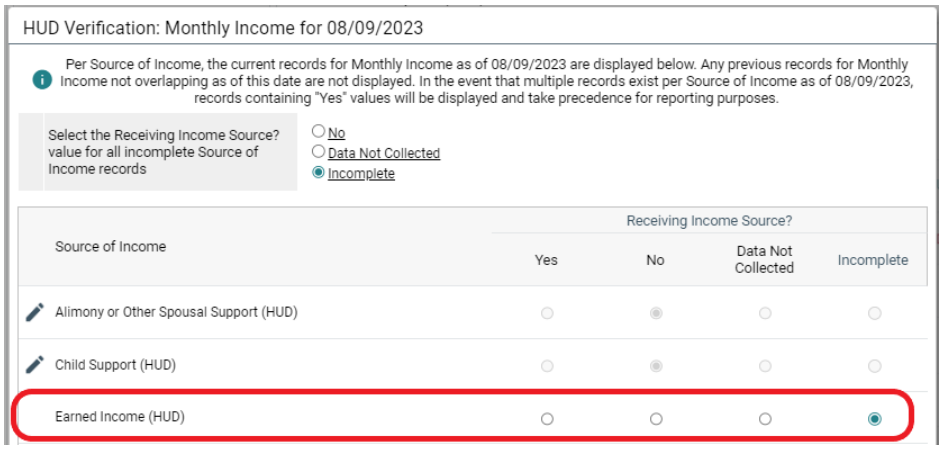


The **Edit Recordset** window will appear.

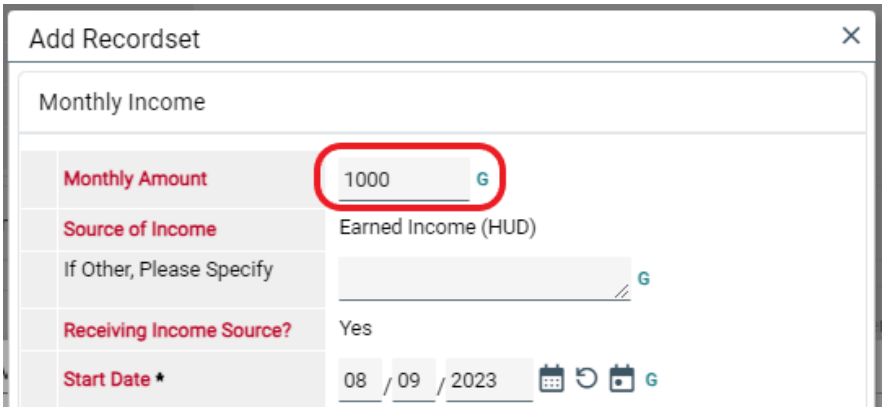


Complete the **End Date** field with the date one day prior to the date of the updated information. For example, if a client began receiving Earned Income on 08/09/2023, the **End Date** for the old recordset (where it was indicated that they did *not* receive Earned Income) would be recorded as 08/08/2020.

Click "Save" and you will return to the **HUD Verification** window. Notice the Source of Income that you just edited now appears **Incomplete**.

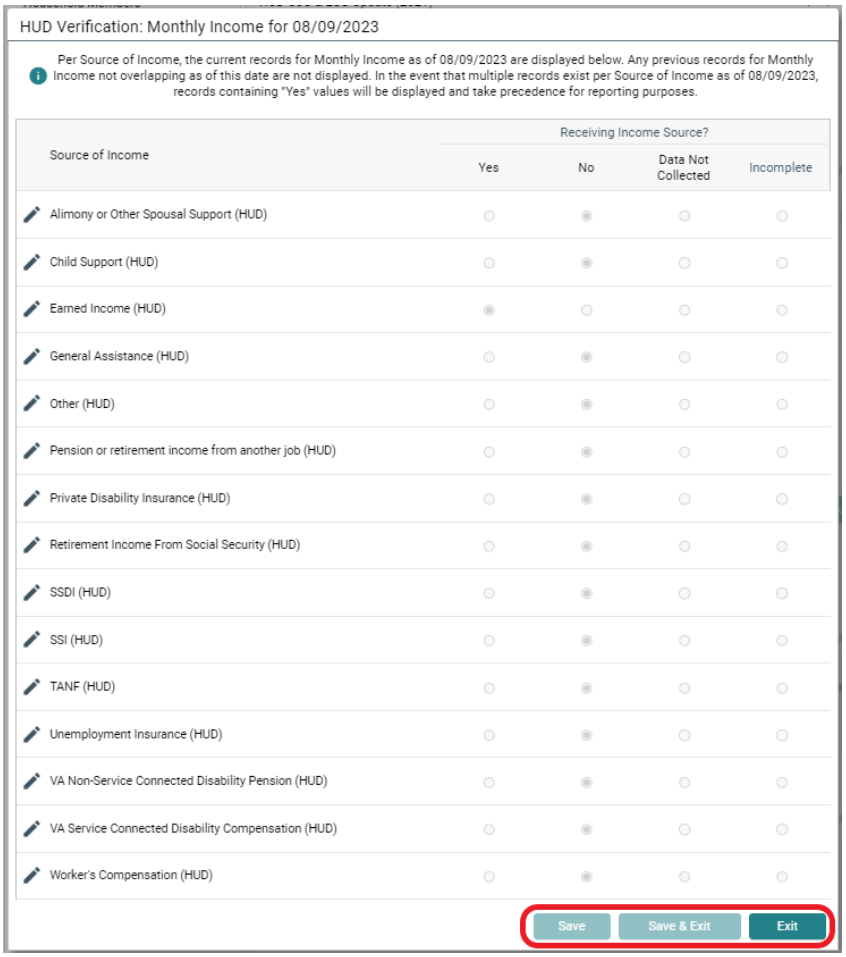


Now you get to assign the new answer to this question. If you are changing the answer to *Yes,* the **Add Recordset** window will appear so that you can record the **Monthly Amount** and click "Save".

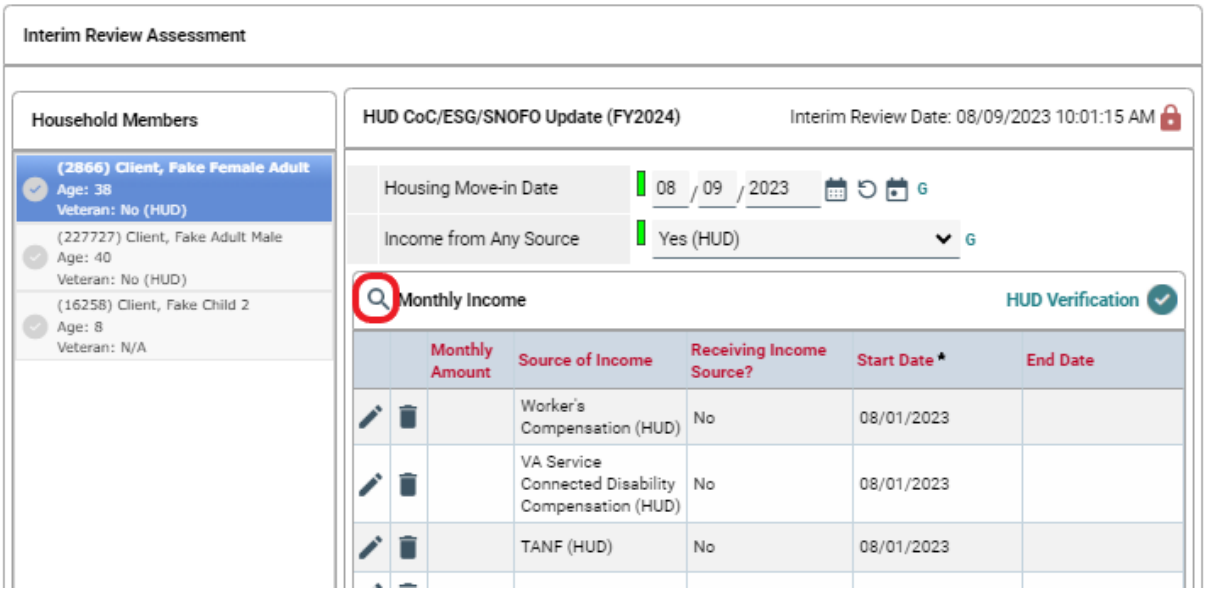


> Helpful Hint: The **Start Date** field will automatically populate as the date assigned to Interim Review.

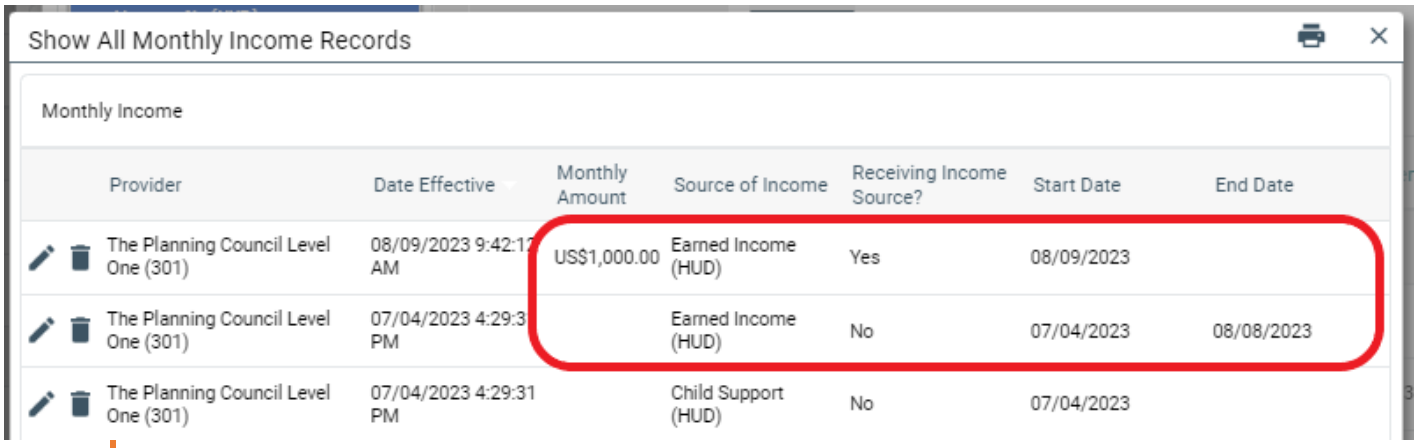
You will now be returned to the **HUD Verification** window. If no other sources are in need of updating, click the "Save & Exit" button. If the "Save & Exit" button is shaded out, that just means you have already saved your changes; you can use the "Exit" button instead.



You will be returned to the **Entry / Exit Interim Review** screen. From here, you can click on the magnifying glass for any of the sub-assessments to review the historical and updated answers to the sources/types.

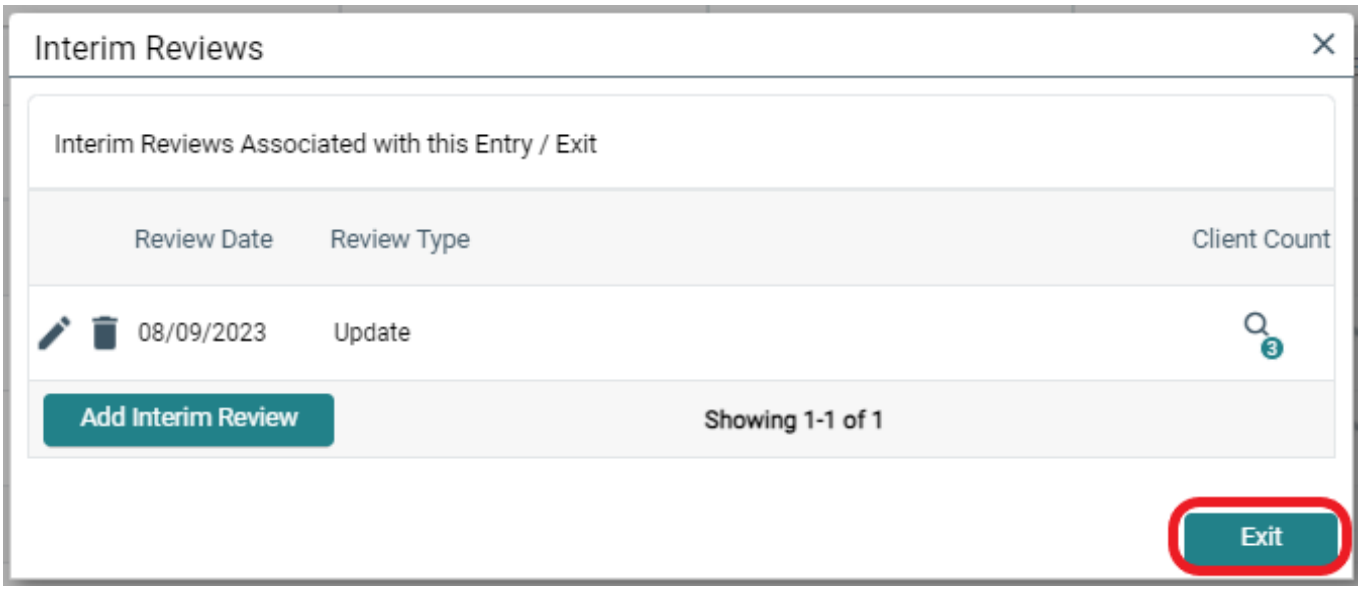


This window that appears allows you to see the client's history with each income source. In our current example, we can see that the client was not receiving Earned Income from 07/04/2023-08/08/2023 but began receiving $1000 on 08/09/2020.

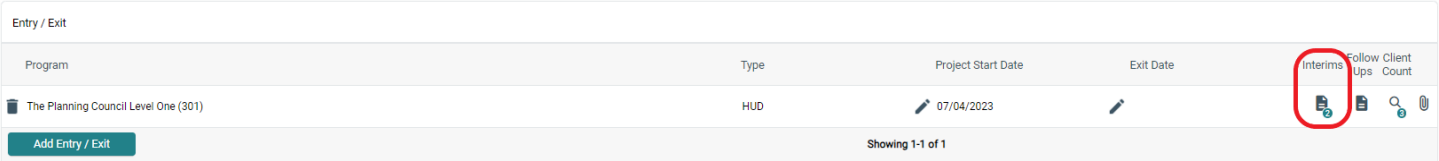


> Helpful Hint: These same steps can be used to record updates to the **Non-Cash Benefits, Health Insurance** and **Disabilities** sub-assessments.

Once you are done recording all updates to the client's information, scroll down and click "Save & Exit". The **Interim Reviews** window will appear. Click "Exit" and you will be returned to the **Entry/Exit** screen.



The Interims column will display the number of existing Interim Reviews inside of a navy-blue circle. You should notice that number has now increased by one.



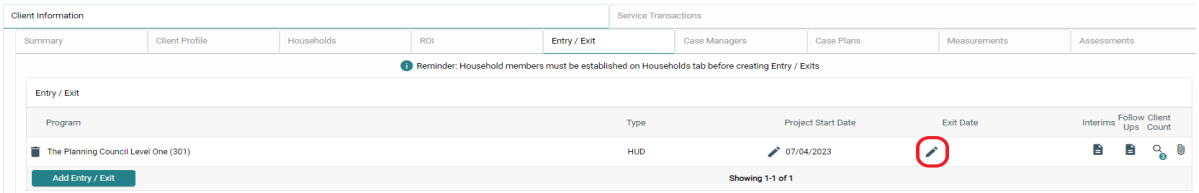
Project Exits

Completing the **Exit Date** section lets the system know that the client(s) is no longer enrolled in the project. Different project types use this field differently, to address the difference in meaning associated with "ending" residential and service projects.

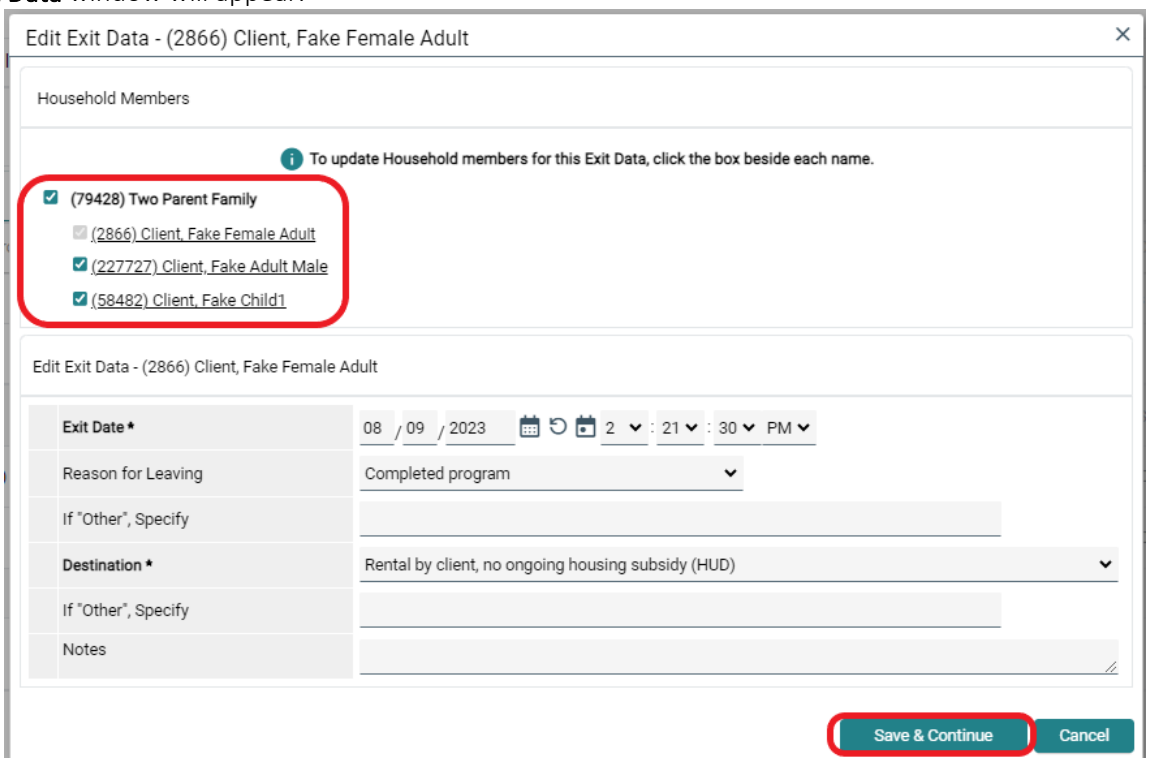
For residential projects, this date should be the last day of a continuous stay in the project. For example, a client's last night spent in an emergency shelter bed is 08/08/2023. Their Project Exit Date should be 08/09/2023.

For non-residential projects this should be the last day a contact was made or a service was provided.

When viewing the **Entry/Exit** tab, locate the applicable **Entry/Exit** record. Click the pencil icon located in the applicable record line under the **Exit Date** column.



The **Edit Exit Data** window will appear.

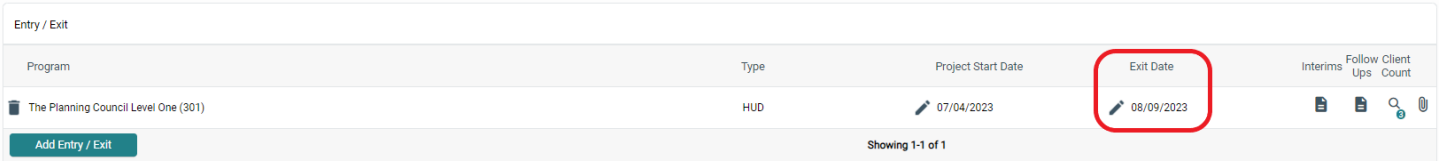


> Helpful Hint: Be sure to check the box next to each household member that is exiting the project.

Record the appropriate **Exit Date*, Reason for Leaving** and **Destination***. Click "Save & Continue".

The **Entry/Exit Data** window will appear. The **Exit Assessment** is available for any last updates to client information can be made following the same steps described in the Interims section of this manual. If there are no updates, scroll down and click "Save & Exit".

This returns you to the **Entry/Exit** tab. Notice the **Exit Date** has been recorded.

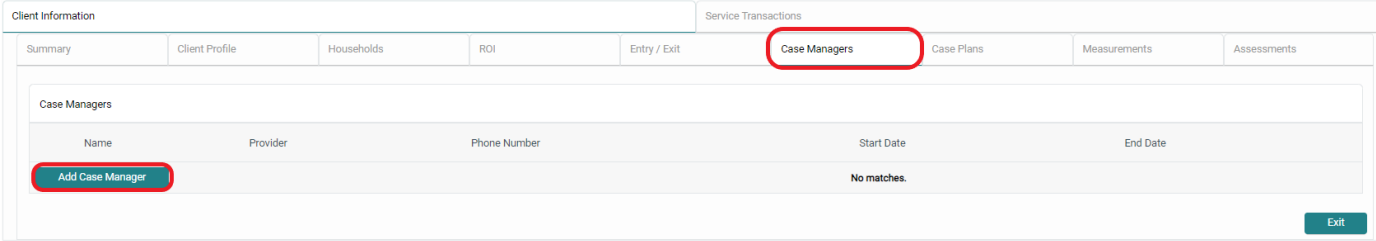


Case Managers

The Case Managers tab allows you to add yourself or other HMIS licensees within your agency as a Case Manger to a client record.

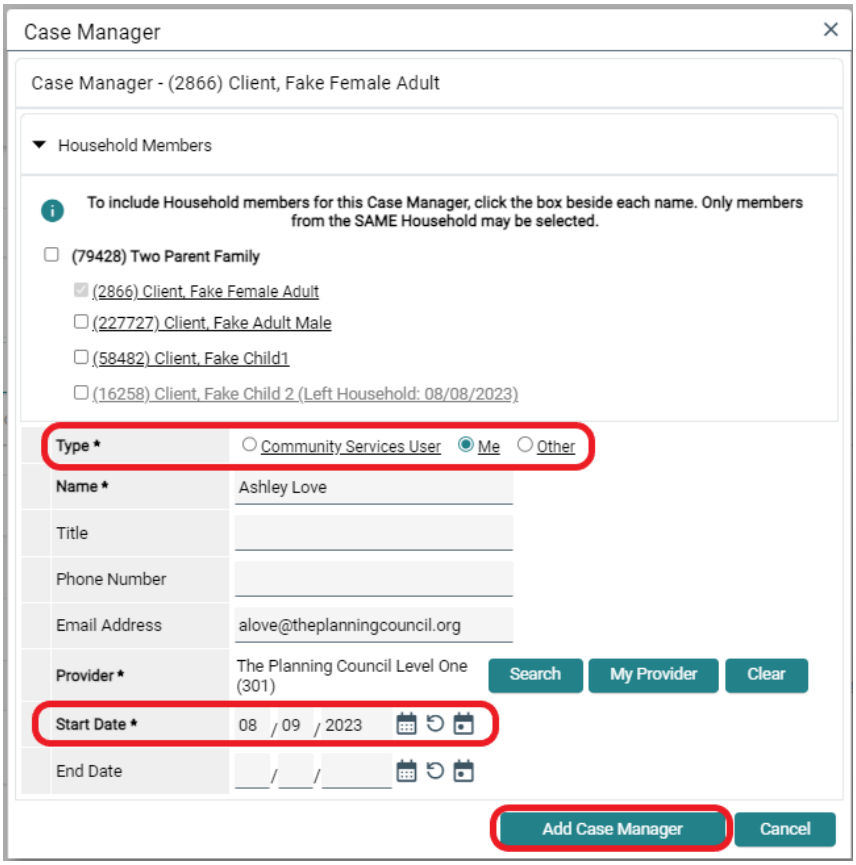
Adding a Case Manager

Click on the **Case Manager** tab when viewing a client record; then click the "Add Case Manager" button.



The **Case Manager** window will appear.

> Helpful Hint: At the top of this window you have the ability to add additional household members for this Case Manager. Many agencies opt to include only the Head of Household to yield a more accurate case load when reviewing Case Manager Client Counts.



Complete the **Type*** section

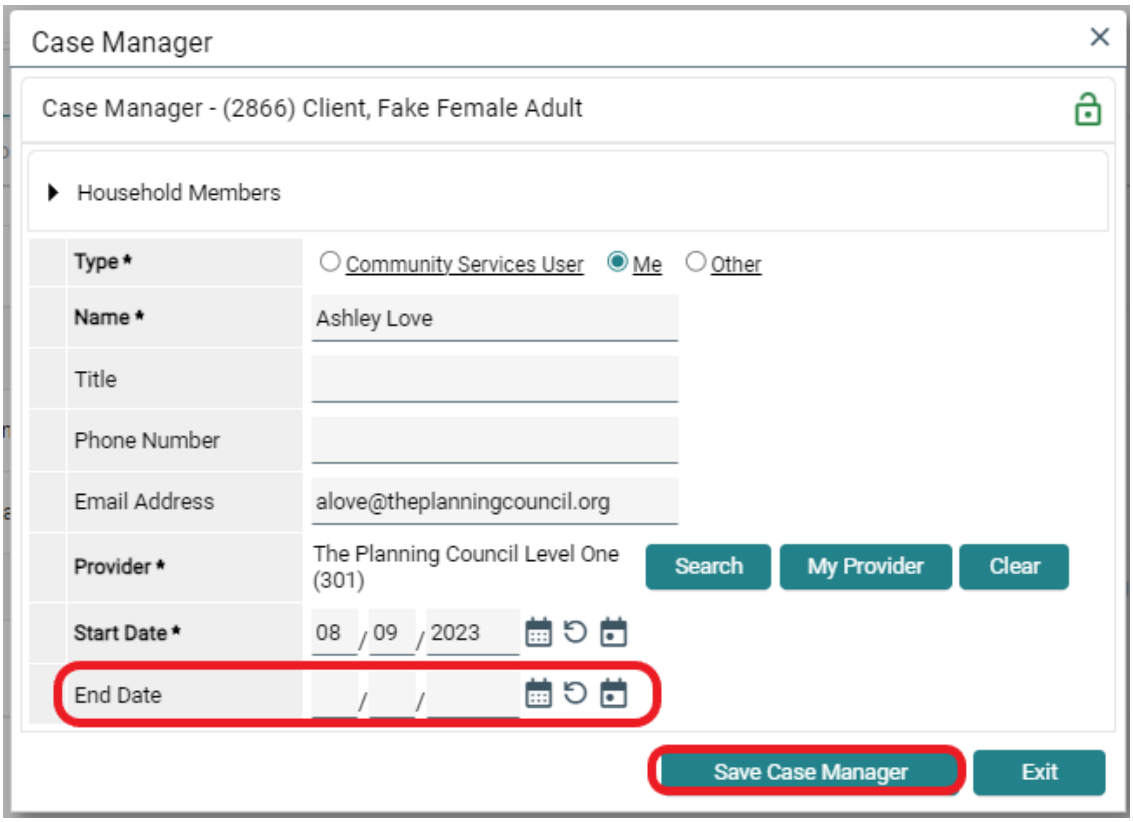
- selecting the Community Services User option assigns the Case Manager to another HMIS end user
- selecting the Me option inserts your information as the Case Manager
- selecting the Other option allows you to type in the name and information for a Case Manager that is not yourself or another HMIS end user

Make sure the **Start Date** is accurate and then click the "Add Case Manager" button. This returns you to the **Case Manager** tab.

Removing a Case Manager

To remove a client(s) from your caseload, navigate back to the **Case Managers** tab and click the pencil icon next to the record line with your **Name**.

The **Case Manger** window will appear.



Complete the **End Date** field and then click "Save Case Manager".

This returns you to the **Case Manager** tab.

Case Plans

Case Plans allows you to create and manage client goals. This includes creating action steps, scheduling follow-ups, and making case notes for clients. For more information, training, or technical assistance on this tab, please contact a System Administrator.

Measurements

The Measurements tab allows you to add new Measurement tools for the client. Measurements include the Self-Sufficiency Matrix and the SPDAT. Please note the SPDAT is different than the VI-SPDAT. For more information, training, or technical assistance on this tab, please contact a System Administrator.

Assessments

The Assessment tab allows you to select additional Assessments to complete for the client. An example of an assessment that can be recorded on this tab is the VI-SPDAT. For more information, training, or technical assistance on this tab, please contact a System Administrator.

Service Transactions

Service transactions include the recording of **Needs**, **Services**, and **Referrals**. Certain grants require the use of Service Transactions (such as PATH, RHY, and HOPWA). Other CoC functions, such as Coordinated Entry, also use Service Transactions to track referrals made to various CoC projects.

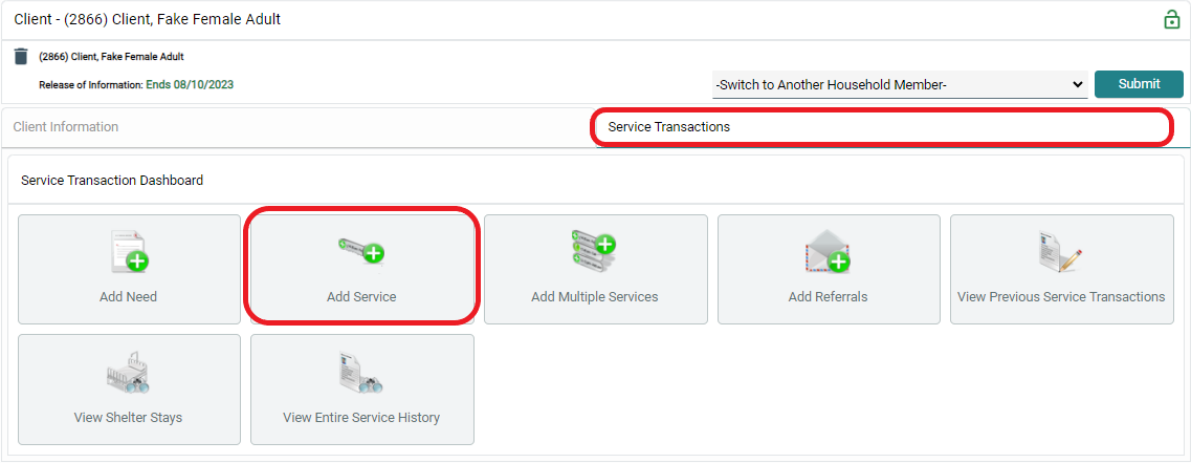
Needs can be identified to track what types of services the client is need of. **Needs** are automatically identified and created in the client's record when a **Service** or **Referral** are recorded.

A **Service** should be recorded to reflect when an agency or project rendered a particular type of service to the client.

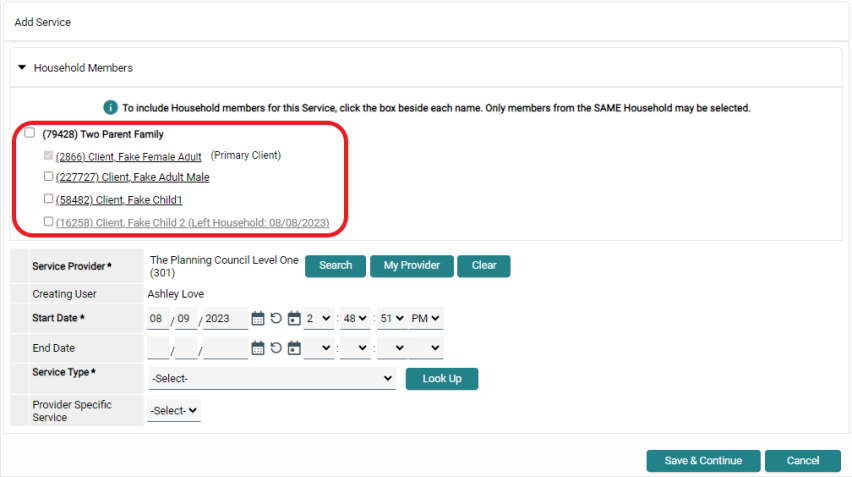
Referrals are recorded to reflect when any agency or project refers the client to another agency or project for services, shelter, or housing. This feature notifies other HMIS participating agency that the client is being sent to them for services.

Adding a Service

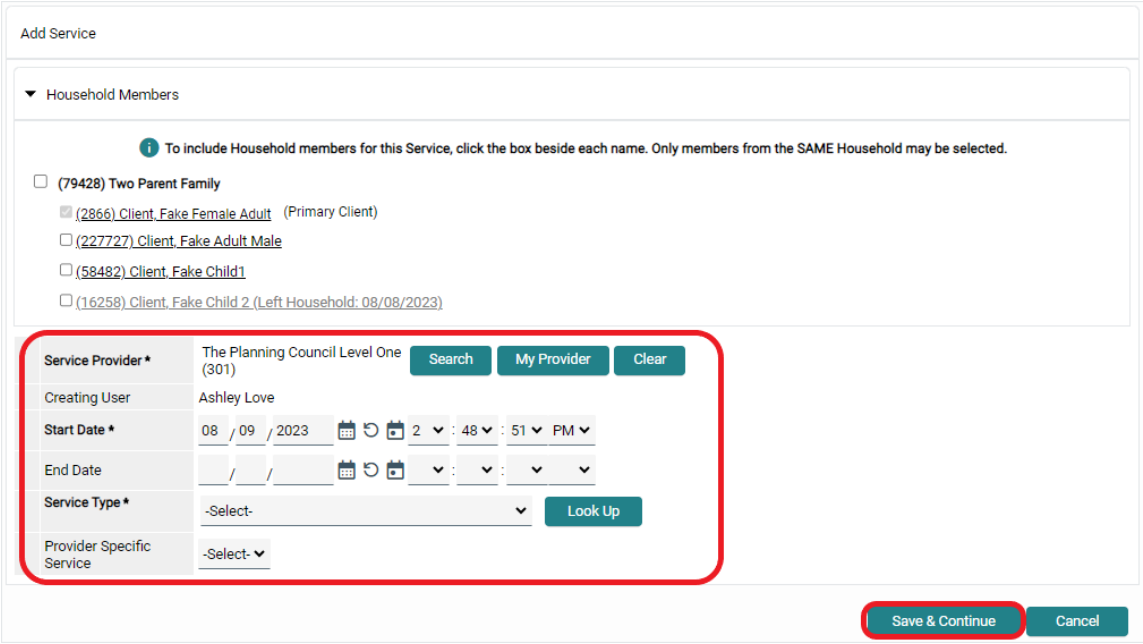
Click on the **Service Transactions** tab and click "Add Service".



The **Add Service** page will appear.



> Helpful Hint: Be sure to check the box next to each household member that should be associated with the Service. If your grant requires that Services be recorded, there may be specific rules that state to only record the Service under the Head of Household (even if it benefits all household members). Be sure to consult your grant's requirements.



Helpful Hint: The Service Type dropdown list can be customized to reflect the specific services an agency provides. Contact a System Administrator for assistance.

The **Service Provider*** should be the project that the service is connected to.

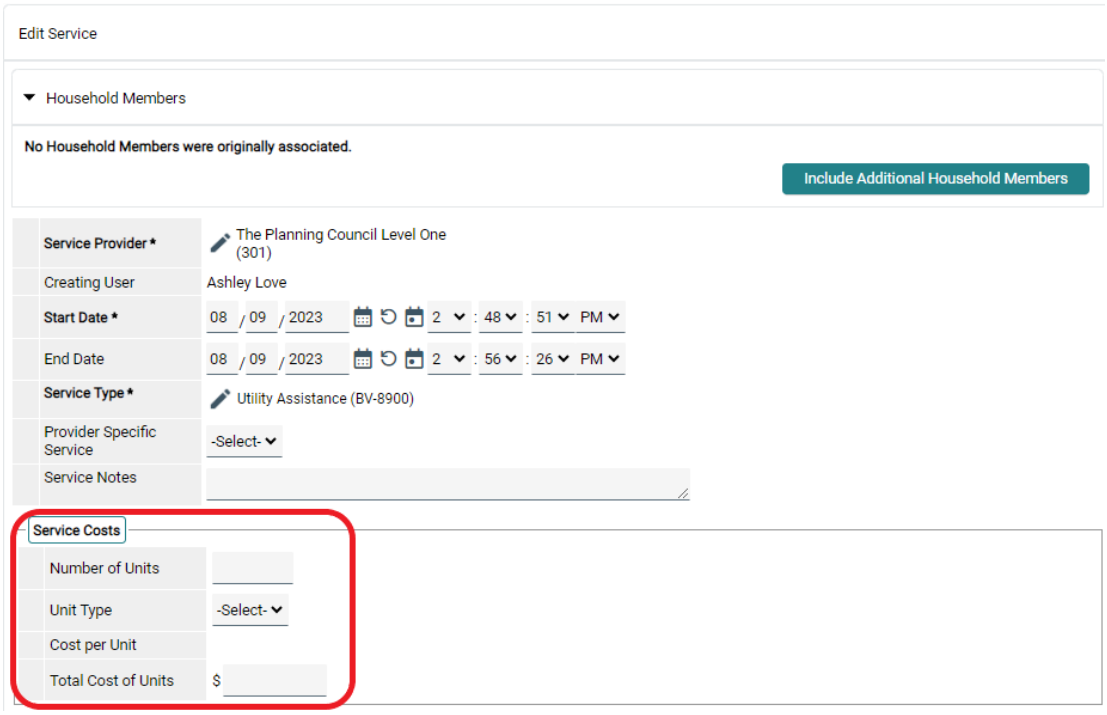
Select the **Start Date*** and **End Date** – it is highly common that these dates are the same.

Select the **Service Type –** if your grant requires you record Services, see the applicable Crosswalk document to determine which Service Type to select.

Click "Save & Continue"

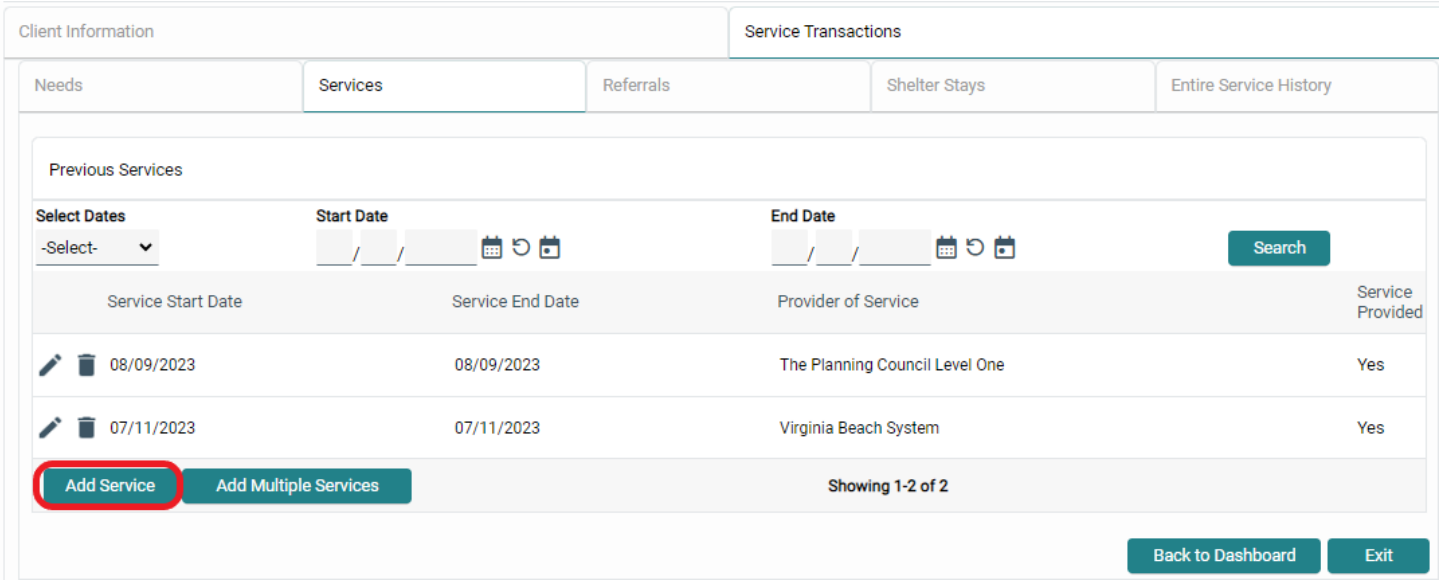
The **Edit Service** page will appear.

If you need to record dollar amounts connected to the Service, scroll down to the **Service Cost** section and record that information.



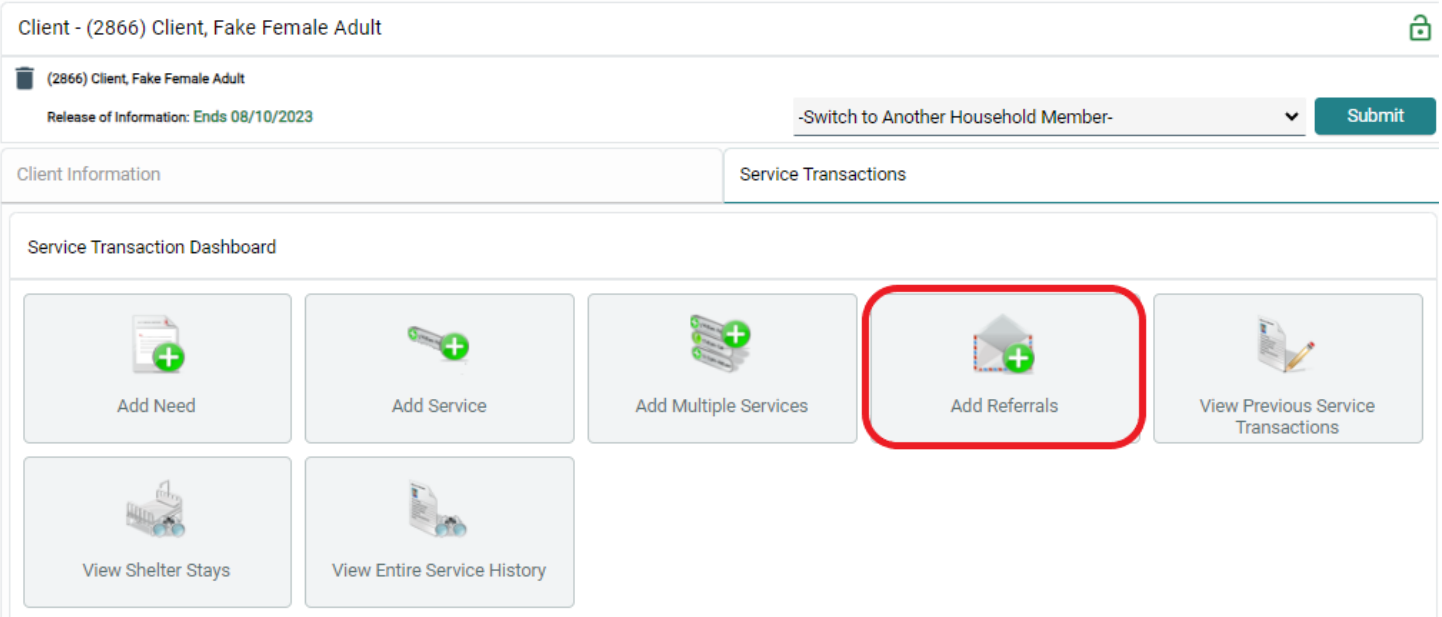
Finally, locate the **Need Information** section and mark the **Need Status** as *Closed*. Click "Save & Exit"

This will take you to the **Services** tab. Additional services can be added by clicking the "Add Service" button.

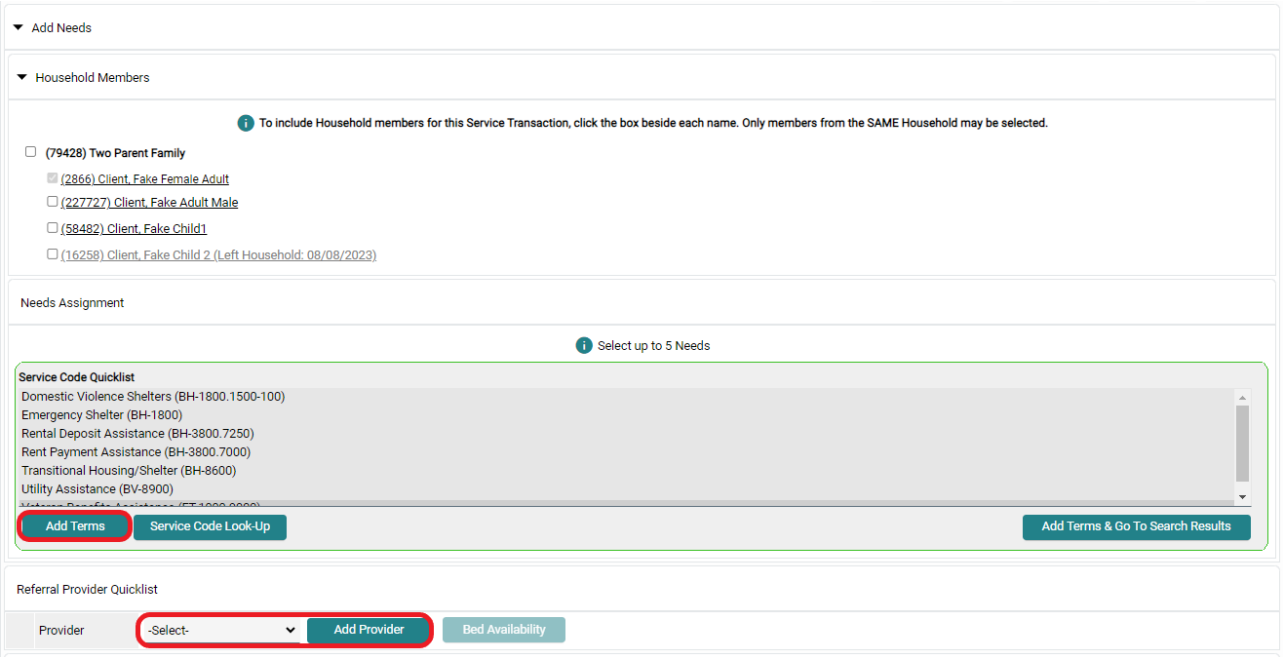


Recording a Referral

Click on the Service Transactions and click Add Referrals.



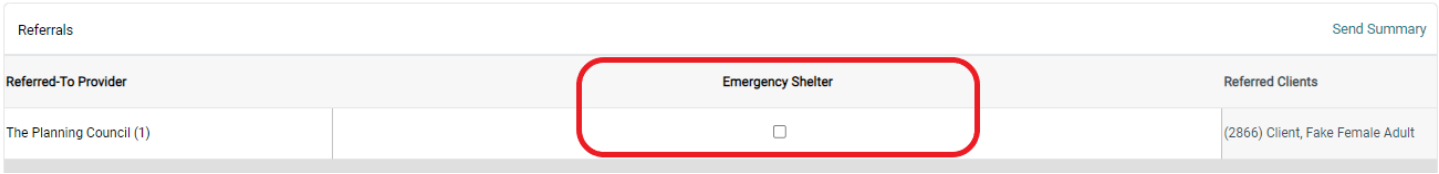
The **Add Needs** page will be displayed.



In the **Needs Assignment** section, use the **Service Code Quicklist** box to identify the appropriate Service Code for the referral. Once you have selected the appropriate Service Code, click "Add Terms".

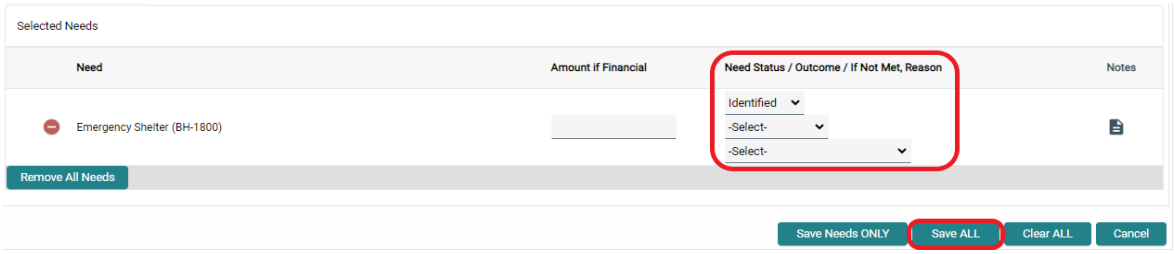
Select the appropriate provider from the **Referral Provider Quicklist** and click "Add Provider".

Scroll down and locate the **Referrals** section - click on the checkbox that appears in the middle column under the type of referral you are creating so that a check appears.

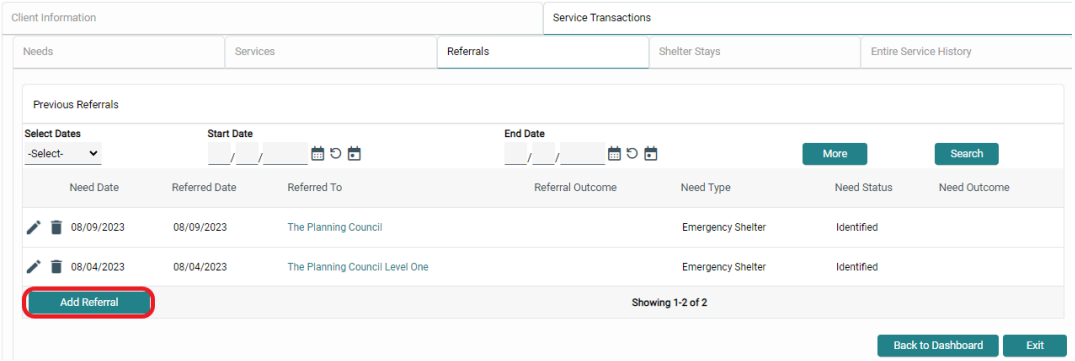


Scroll down and Locate the **Selected Needs** section – locate **Need Status / Outcome / If Not Met, Reason** and select *Service Pending* from the second drop down list.

Click "Save ALL"



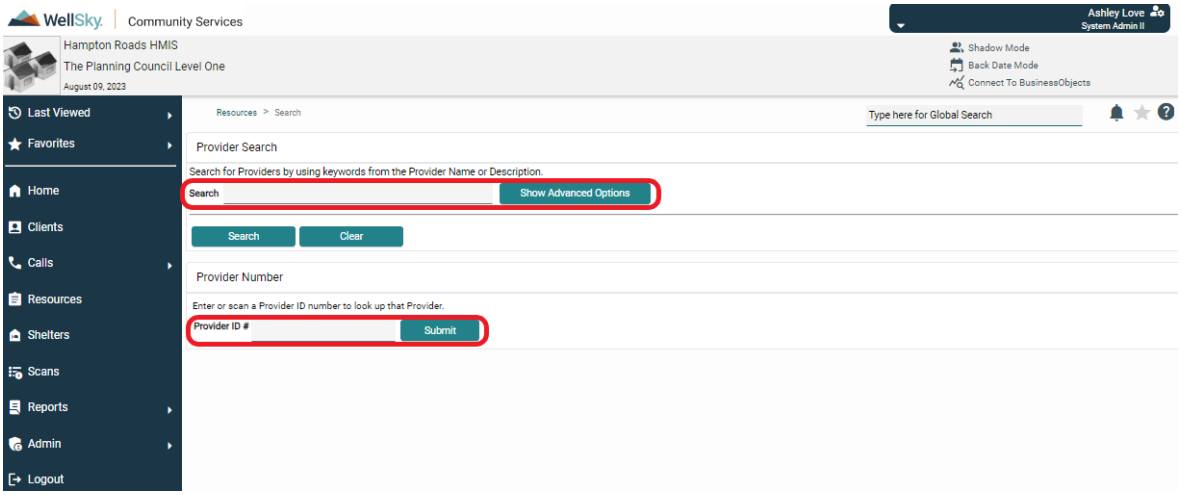
This will take you to the **Referrals** tab. Additional referrals can be added by clicking the "Add Referral" button.



Resources

The **Resources** module is a provider database that contains a list of service providers in the area. It can be used to locate agencies and/or projects based on name, location, and services provided. **Resources** contains profiles for each agency/project, allowing you to view information about them.

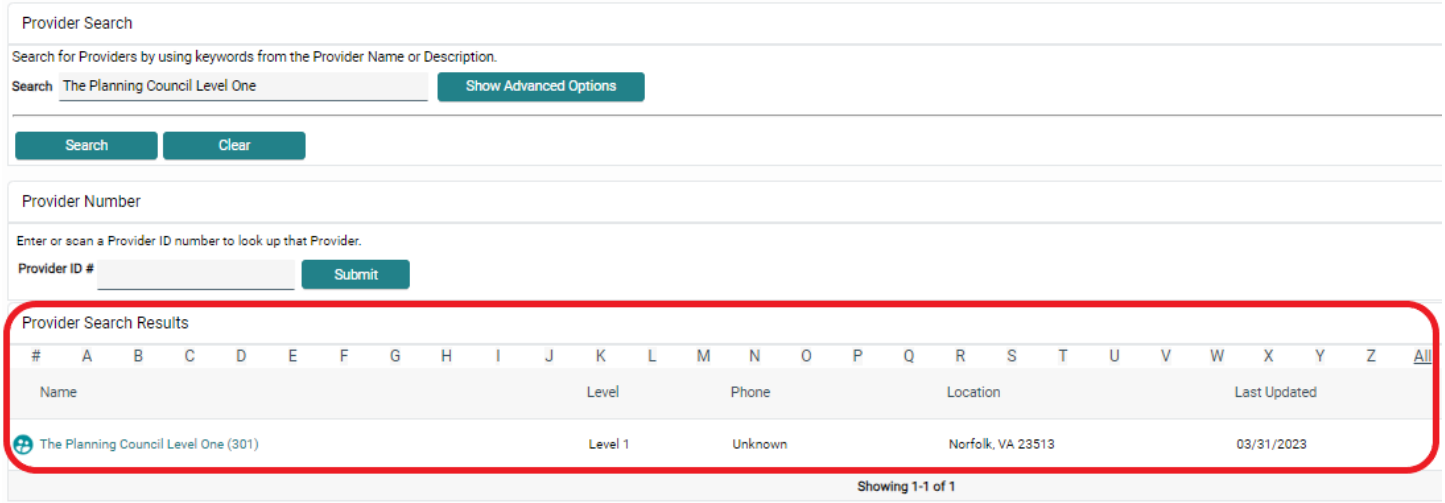
Click **Resources** on the navigation pane located on the left-hand side of the HMIS screen. A **Provider Search** screen will be displayed.



There are several options for searching:

- Click "Search" to display all the providers in the system
- Enter search criteria, such as keywords, location or name of agency and click "Search"
- Click "Show Advanced Options" to search by additional criteria
- Enter the **Provider ID number** if available and click "Submit"

If you do not have a specific **Provider ID #**, you will be clicking "Search" and then **Provider Search Results** will appear. Scroll through the list of Providers or select a letter of the alphabet from the top to narrow the search.

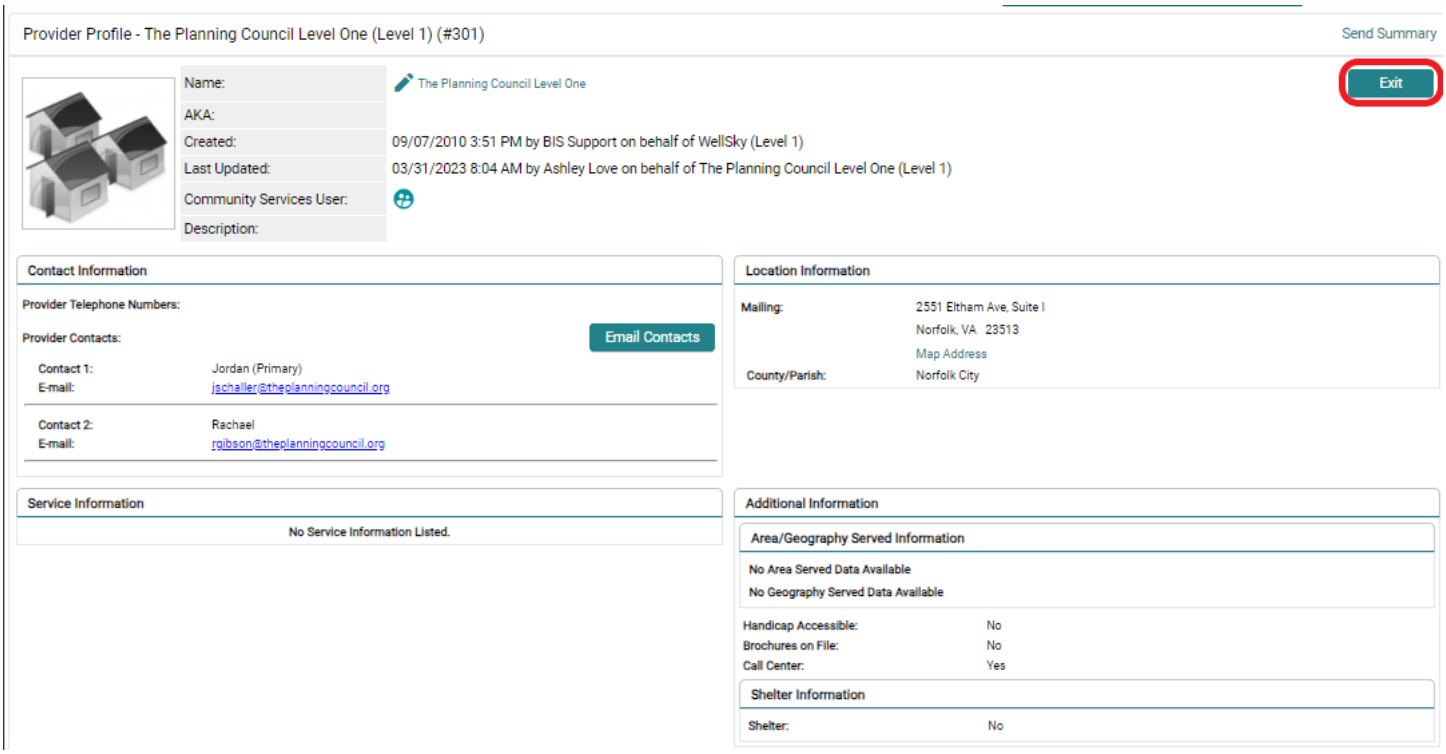


> Helpful Hint: If you hover the cursor over the providers name, a pop-up window will show a snapshot of the profile.

Select the provider by clicking on their hyperlinked name. This will take you to the **Provider Profile** screen.

The **Provider Profile** contains information about the provider to include the services they provide, where they are located, eligibility criteria, contact information, and much more (as available).

Click "Exit" to return to your initial search results.



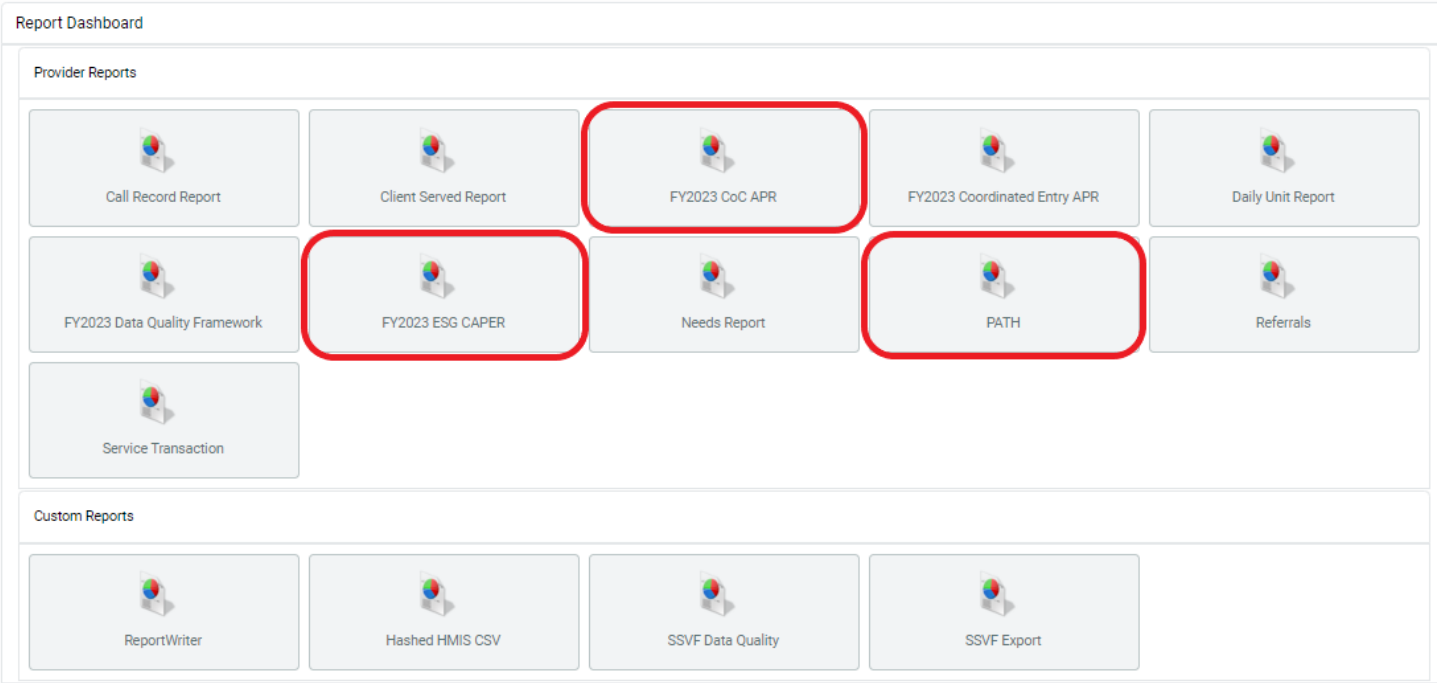
Reports

The Reports module allows you to run preformatted reports that are created by the software vendor, WellSky.

Click on **Reports** on the navigation pane on the left-hand side of the HMIS screen. The **Reports Dashboard** will be displayed.

Certain reports that are required to be submitted to your funders will be located here. For example, this is where you find the CoC APR, the ESG CAPER, and the PATH Report.

For additional assistance with running Reports, please contact a System Administrator.



Additional Resources

The *Hampton Roads HMIS Policy and Procedures* contains information surrounding the use and purpose of HMIS, security and privacy policies, copies of the agency and user agreements, etc. Contact your HMIS Lead Agency or a System Administrator for more information.

The *Data Quality Plan* has been formally adopted by each CoC and contains information on the expectations, monitoring, and evaluation of data quality in HMIS. Contact your HMIS Lead Agency or a System Administrator for more information.

The HUD Exchange HMIS Data Standards web page: https://www.hudexchange.info/resource/3824/hmis-data-dictionary/

This webpage contains the following manuals and resource guides:

- HMIS Data Standards Manual – applicable to all HMIS participating agencies
- Federal Partner Program Manuals –
    - CoC Program HMIS Manual
    - ESG Program HMIS Manual
    - PATH Program HMIS Manual
    - VA Program HMIS Manual
    - RHY Program HMIS Manual
    - HOPWA Program HMIS Manual
    - HUD VASH Program HMIS Manual

References

HUD Exchange. (n.d.). Retrieved from https://files.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual.pdf

HUD Exchange Resources. (n.d.). Retrieved from https://files.hudexchange.info/resources/documents/CoC-Program-HMIS-Manual.pdf