HELP MANAGEMENT INFORMATION SYSTEM

Santa Cruz County Continuum of Care

2018

Emergency Shelter- Attendance

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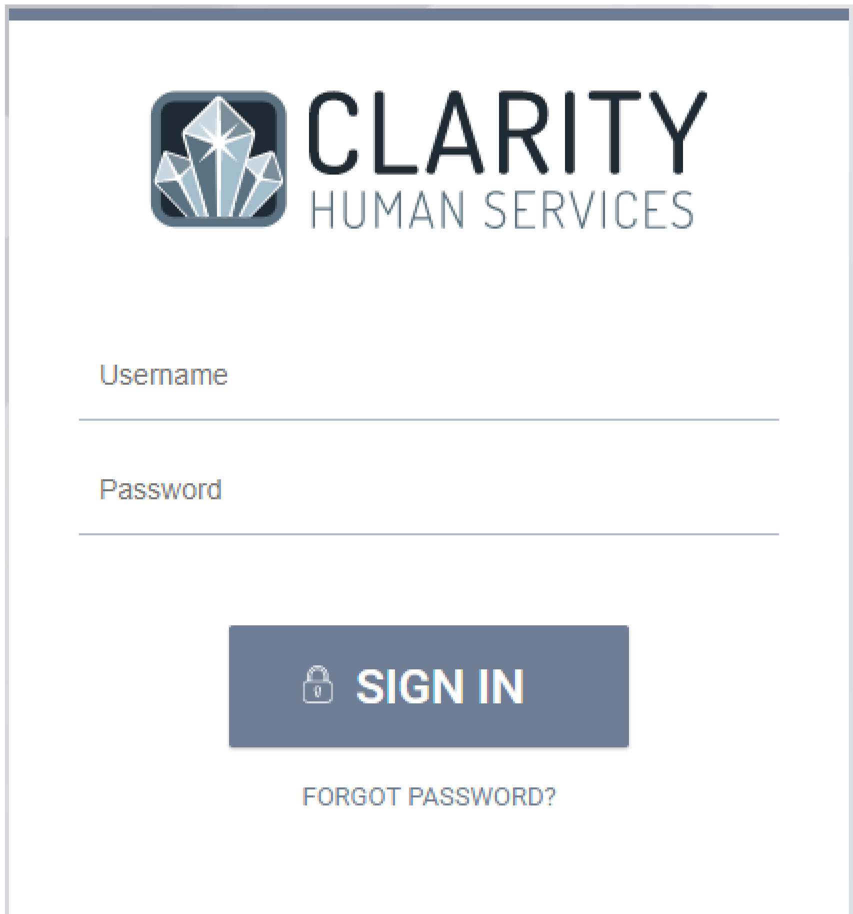
Phone 408.437.8800 • Fax 408.437.916

Access HMIS Web Portal

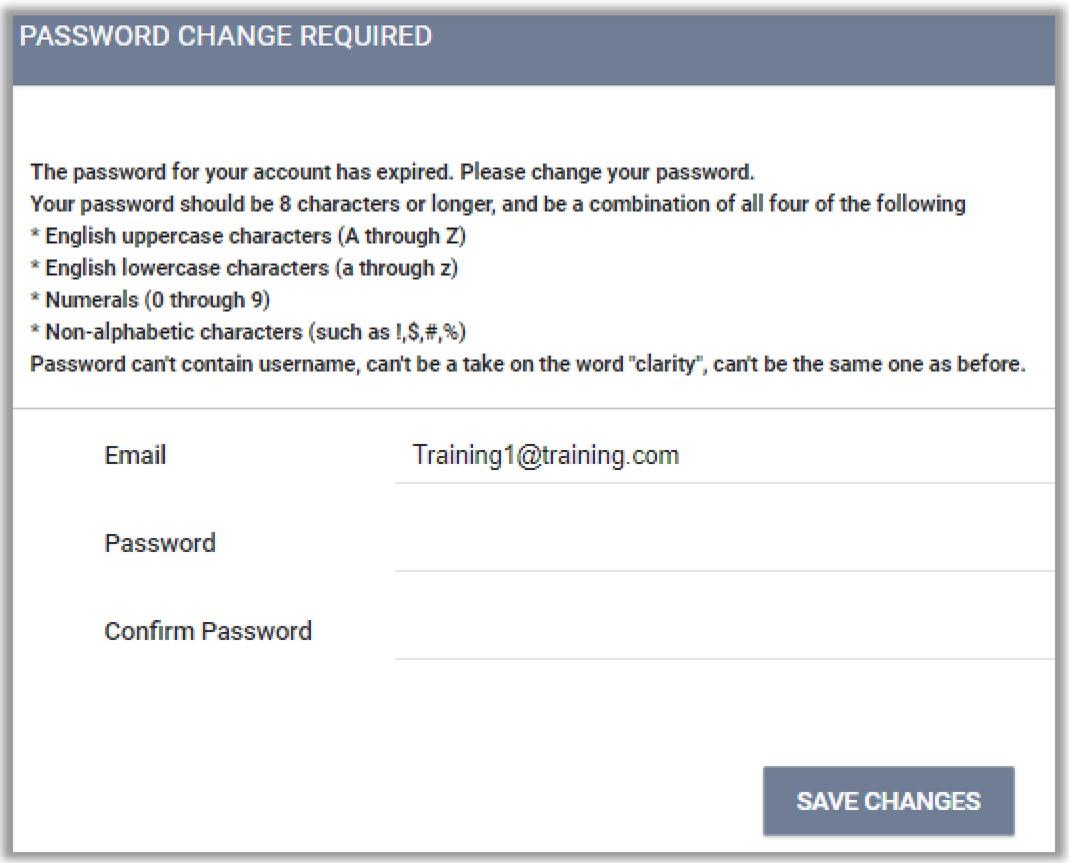
Access the **Santa Cruz HMIS** portal at: www.ctagroup.org/santa-cruz-hmis/

Enter given Username and temporary Password, then click *Sign In*.
If no temporary password was given, click on *Forgot Password* (see page 4).



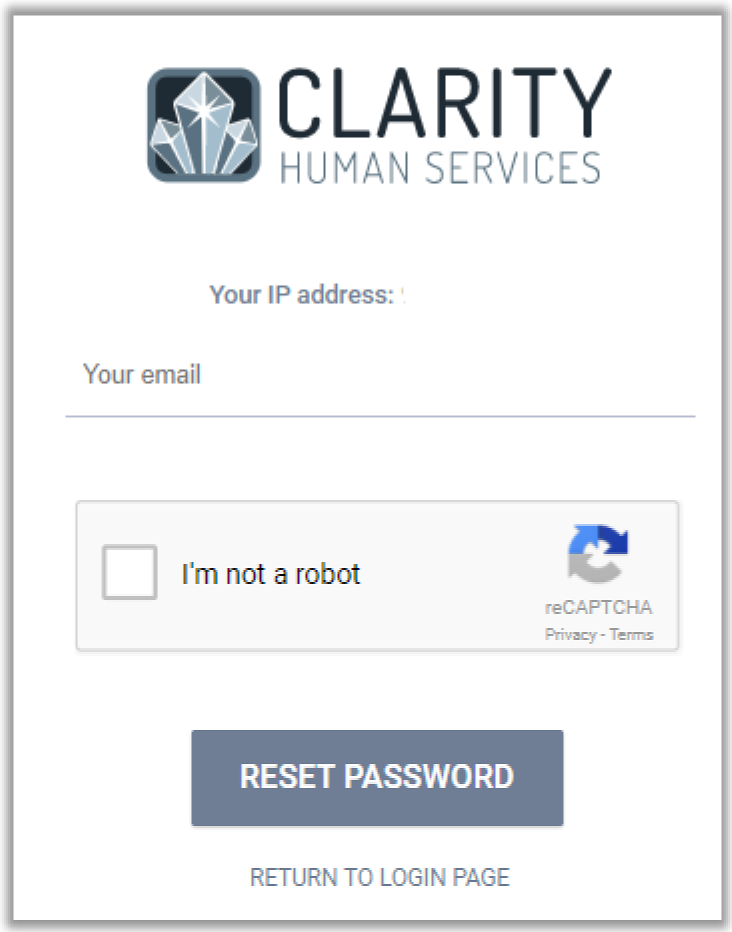
Temporary Password- Password Change

Upon logging in, you will need to set your own password. Set your password then click *Save Changes.*



Forgot Password/Reset Password

If a user forgets their password or need to reset the password:
Enter user's e-mail, click on the check box *I'm not a robot,* then click *Reset Password.*
User will now be notified by email with a link and how to reset the password.



User Policy Agreement- Signature

A *User Policy Agreement* screen appears on the next screen after logging in. Read and check off all the Policy Agreement, then click *Save*.

USER POLICY AGREEMENT

Agency User recognizes the primary focus in the design and management of the Bay Area HMIS is to address the needs of clients. This includes both the need to continually improve the quality of homeless and housing services, and the need to maintain client confidentiality by treating personal data with respect and care.

As the guardians entrusted with this personal data, Bay Area HMIS users have a moral and legal obligation to ensure that appropriate methods are practiced with the collection, access, and utilization of data. Each user is responsible to make sure that client data is only used for the purpose for which it is collected. Proper user training, adherence to the Bay Area HMIS policies and procedures, and a clear understanding of client confidentiality are vital to achieving these goals.

It is a client's decision about which information, if any, entered into HMIS shall be shared and with which Partner Agencies. The client Release of Information (ROI) shall be signed if the client agrees to share information with Partner Agencies.

- [ ] My user ID and password are for my use only and must not be shared with anyone.
- [ ] I must take all reasonable means to keep my password physically secure.
- [ ] I understand that the only individuals who can view information in HMIS are authorized users and the clients to whom the information pertains.
- [ ] I may only view, obtain, disclose, or use the database information that is necessary to perform my job
- [ ] If I am logged into HMIS and must leave the work area where the computer is located, I must log off HMIS before leaving the work area.
- [ ] Failure to log off HMIS may result in a breach in client confidentiality and system security.
- [ ] Hard copies of HMIS information must be kept in a secure file.
- [ ] When hard copies of HMIS information are no longer needed, they must be properly destroyed to maintain confidentiality.
- [ ] If I notice or suspect a security breach, I must immediately notify the Agency Administrator and/or Community Technology Alliance.

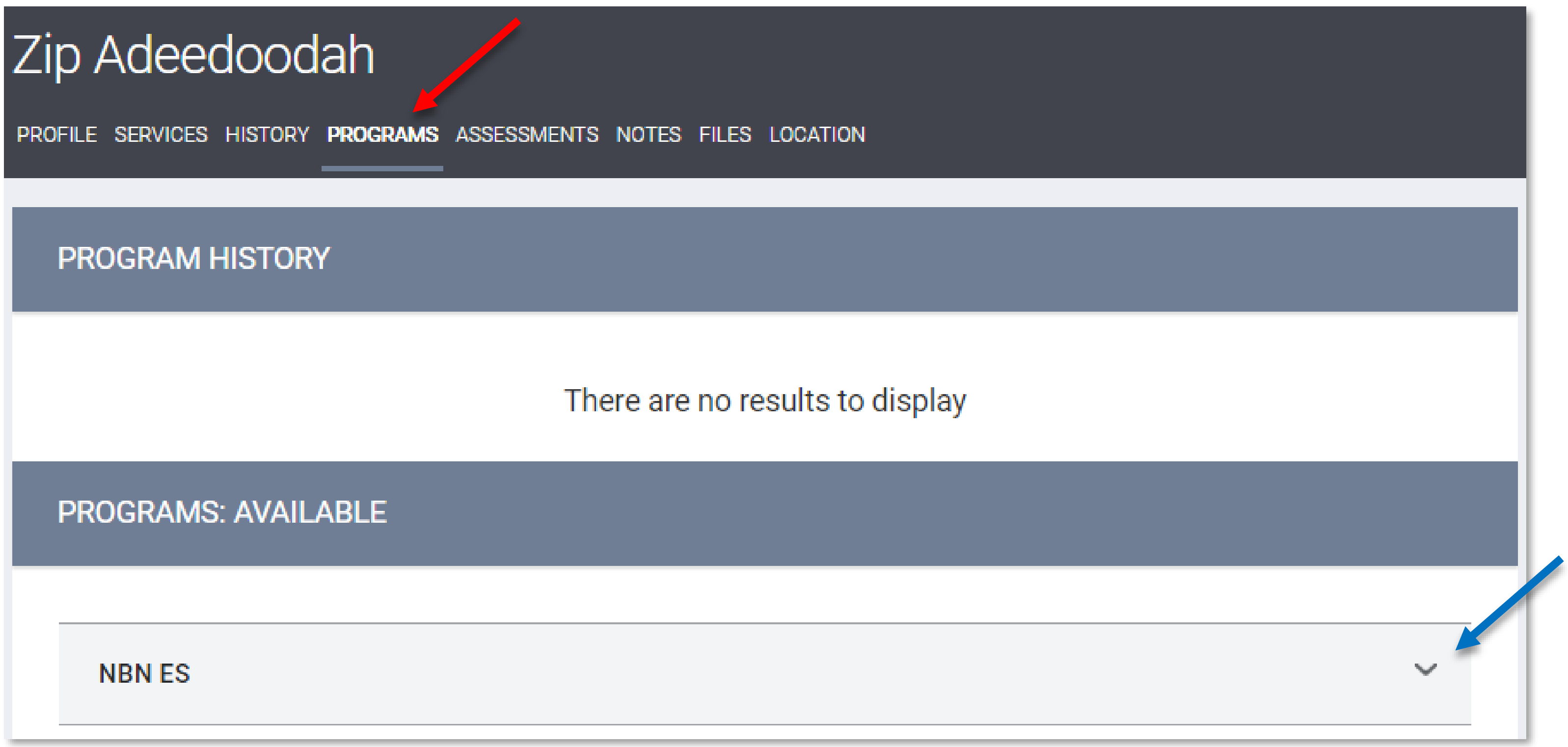
User Code of Ethics:

- [ ] HMIS users must treat Partner Agencies with respect, fairness and good faith.
- [ ] Each user should maintain high standards of professional conduct in the capacity as a HMIS user.
- [ ] The user has primary responsibility for his/her client(s).

Program Enrollment

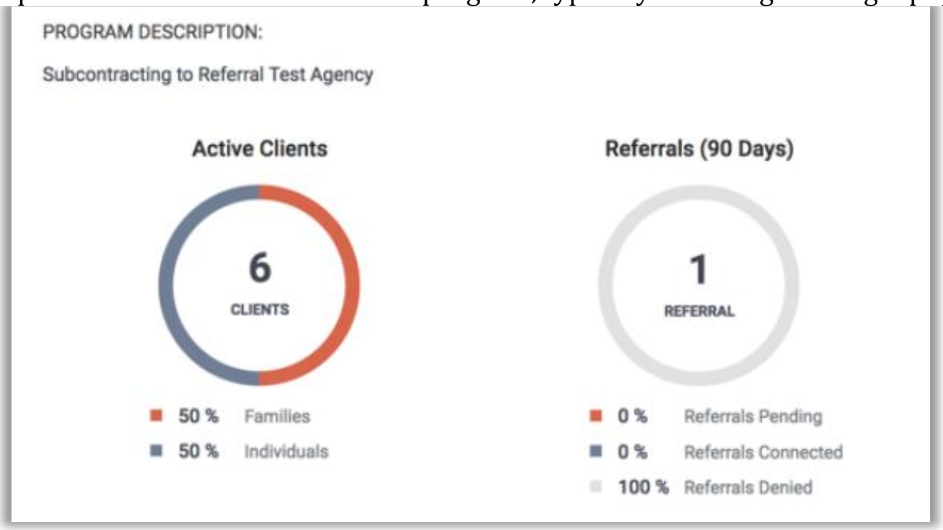
To provide a service, the client will need to be enrolled into a program.

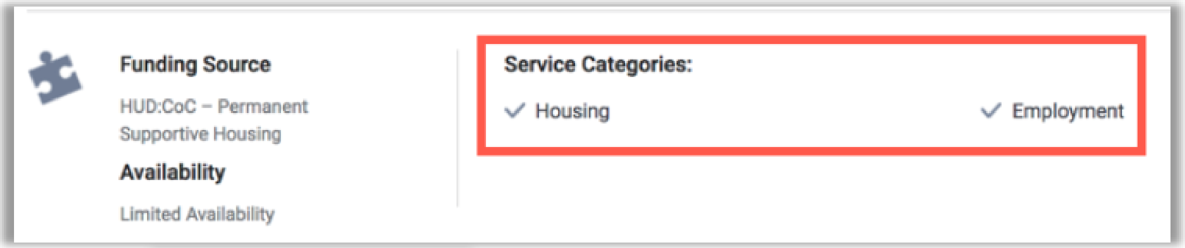
To enroll a client/household into a program, click on *Programs* tab- top menu of the client record (red), select the drop down arrow (blue) next to the applicable program title under *Programs: Available.*



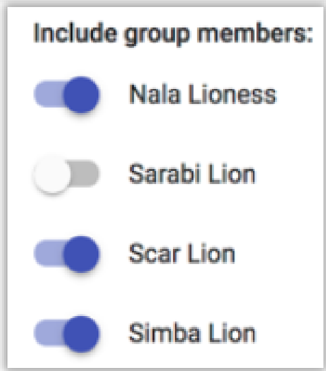
Program Enrollment-Continued

The program description provides a brief overview of the program, typically including the target population(s) and general service(s).





This section indicates the categories of the different services this program provides (e.g. [APR] Transportation, [QPR] Rental Assistance).

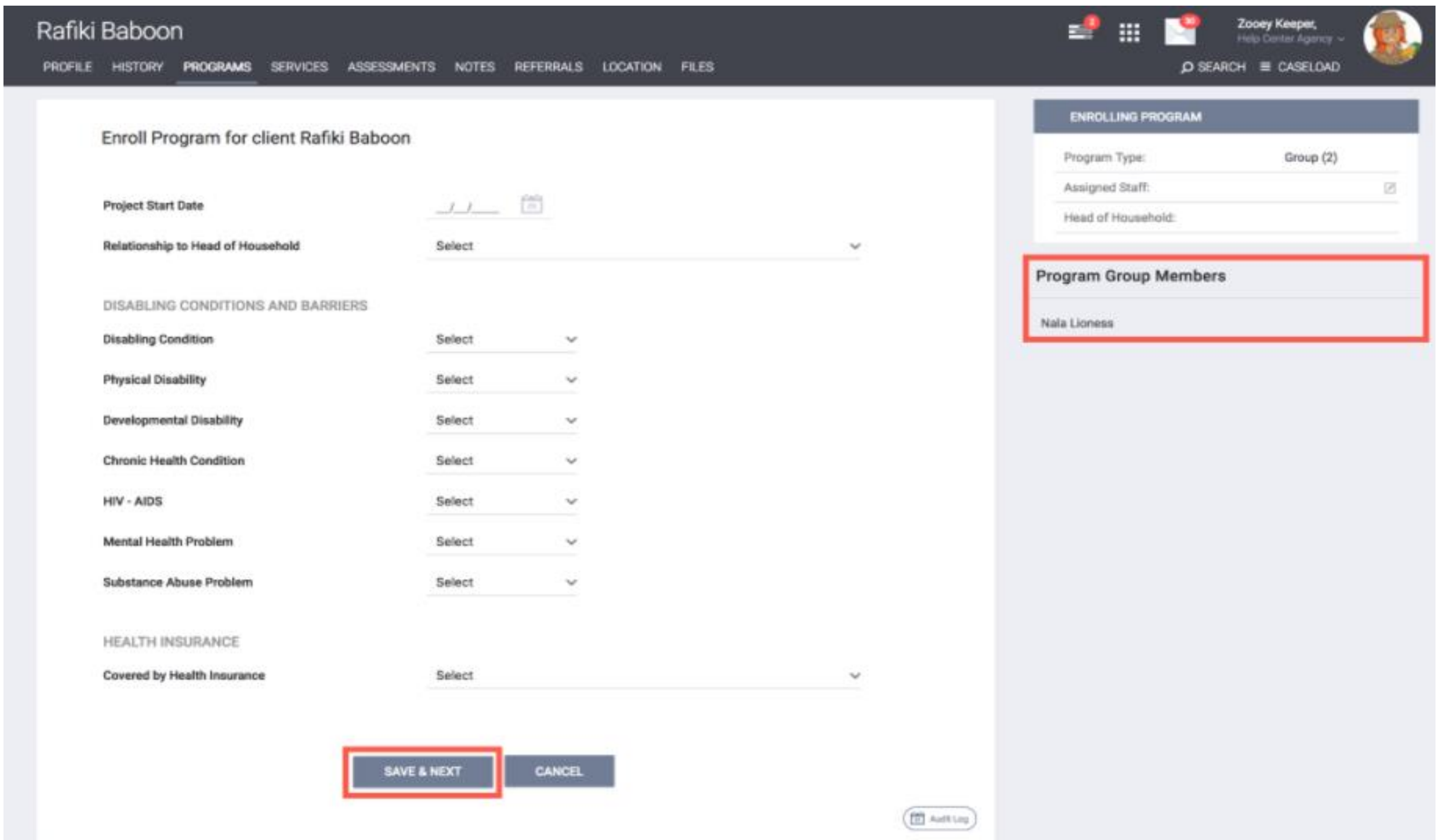


If your client is part of a household/family, you will be automatically prompted to select family/household members to include in the program. It is important to note that you must have already created a family/household to have this feature. Click on the switch, the blue indicates on.

Program Enrollment- Continued

After clicking *Enroll* icon, you will be taken to the Program Enrollment page for your original client. This page will present program specific data element necessary to complete the program enrollment.

Note: If you are enrolling other household/family members, there will be a Save and Next button. Selecting this will enroll the current member, and automatically take you to the correct program enrollment screen for the next member.



Working with Dynamic Data Fields

When you enroll your client in the program, you will notice dynamic data fields in the enrollment form. The dynamic intake forms powered by Clarity provide many flexible features. Individual data elements can be Required, Soft Required or Not Required.

Note: Some data fields may already be completed due to cascade enrollment data feature set in Clarity; it allows information to pre-fill client's information based on previous enrollment values within set amount of days. End users still need to make sure that the client's information is accurate and up to date.

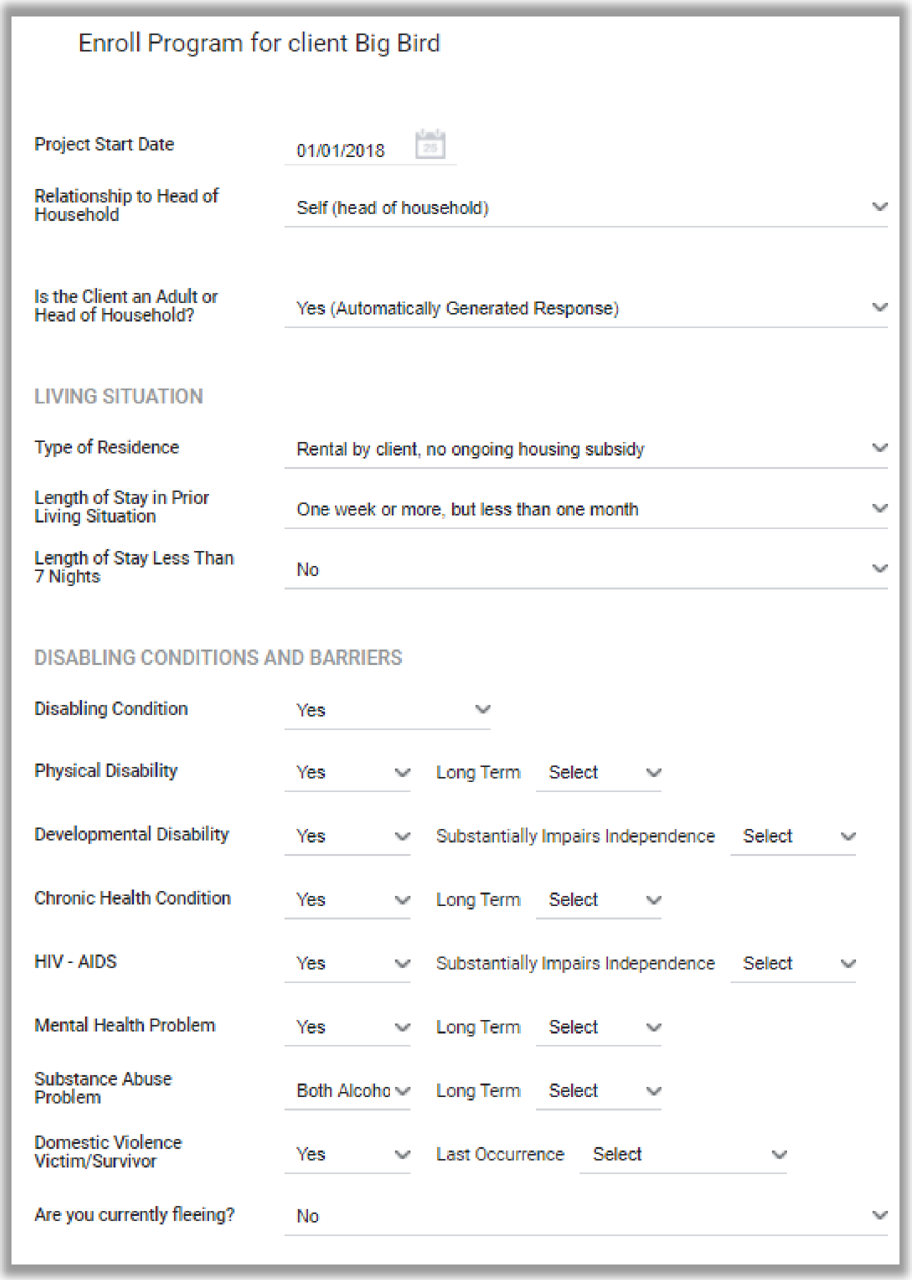
Required
The data element must be completed; this will not allow you to save the page unless a value is set. A red banner is set across the top of the page, and the data element is outlined in red.

Soft Required
The data element is optional, but highly recommended. The data will allow you to continue; a yellow banner will appear and the field in question will be outlined in yellow.

Not Required
The data element is requested as a part of the form but is completely optional for data entry. No notice is provided.

Complete all necessary fields, and click *Save* & *Next* at the bottom of the page to create the client enrollment. If you have selected additional family/household members to include, you will be presented with an enrollment for each client.

Program Enrollment- Data Intake


Enroll Program for client Big Bird

Project Start Date 01/01/2018

Relationship to Head of Household Self (head of household)

Is the Client an Adult or Head of Household? Yes (Automatically Generated Response)

LIVING SITUATION

Type of Residence Rental by client, no ongoing housing subsidy

Length of Stay in Prior Living Situation One week or more, but less than one month

Length of Stay Less Than 7 Nights No

DISABLING CONDITIONS AND BARRIERS

Disabling Condition Yes

Physical Disability Yes Long Term Select

Developmental Disability Yes Substantially Impairs Independence Select

Chronic Health Condition Yes Long Term Select

HIV - AIDS Yes Substantially Impairs Independence Select

Mental Health Problem Yes Long Term Select

Substance Abuse Problem Both Alcoho Long Term Select

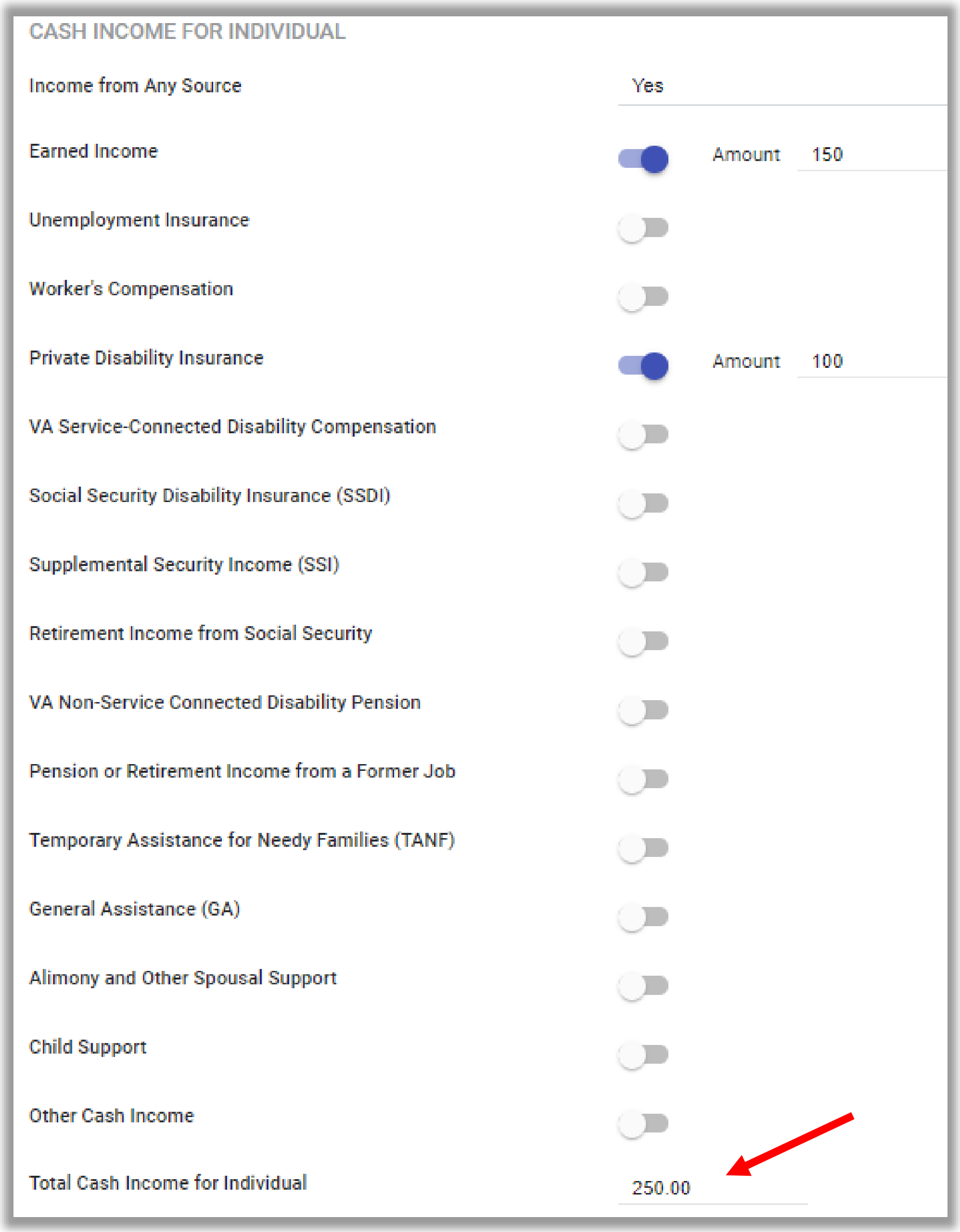
Domestic Violence Victim/Survivor Yes Last Occurrence Select

Are you currently fleeing? No

*Tool tip: when hovered over a certain question, a short description will appear.

Based on the type of answer given, the field will expand for more selections. i.e.) If the client said yes to *Physical Disability* it will prompt another field: *Long Term* and the options of *Yes, No, Client doesn't know, Client refused,* or *Data not collected* can be selected.

Program Enrollment- Data Intake- Cash Income



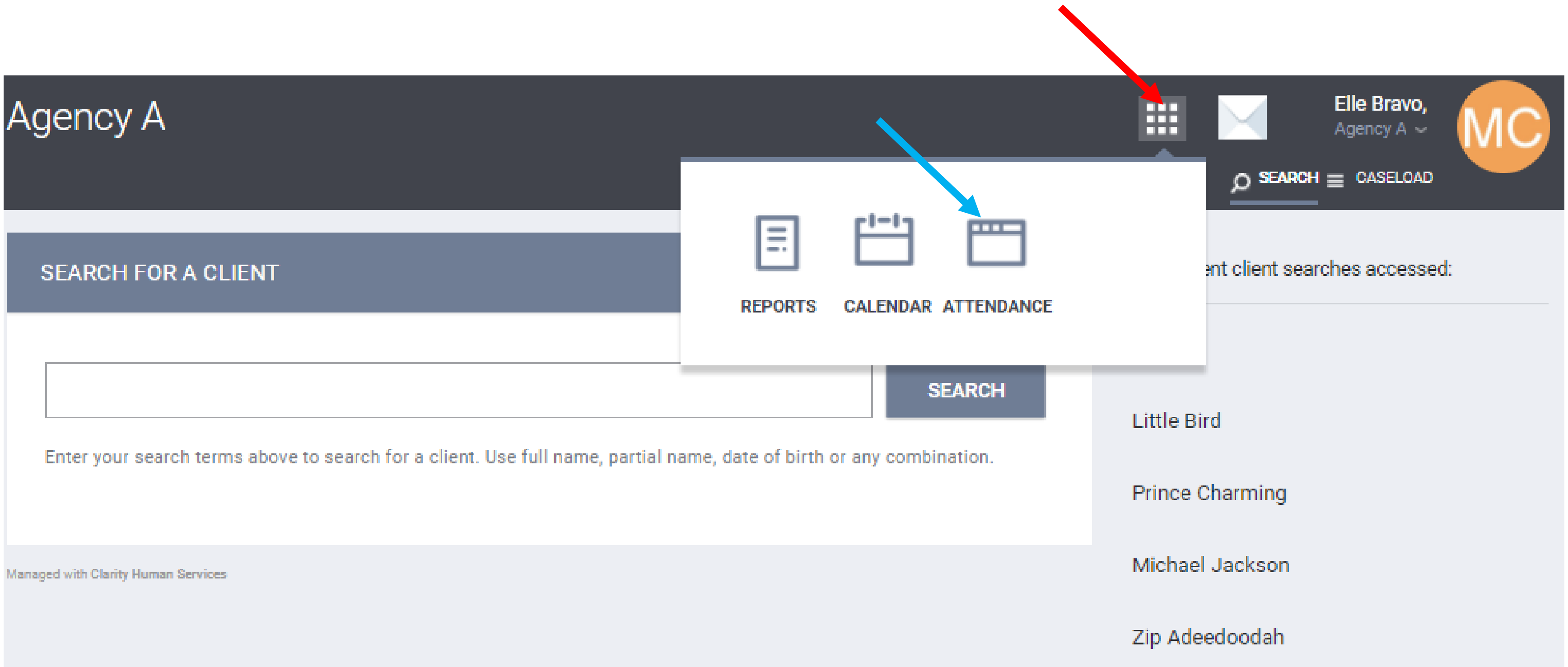
If *Income from Any Source* is selected *Yes*, this will prompt other cash income.

Click the switch to enter client's source of earned income.

If the client has multiple source, the *Total Cash Income for Individual (red)* will auto calculate the total amount.

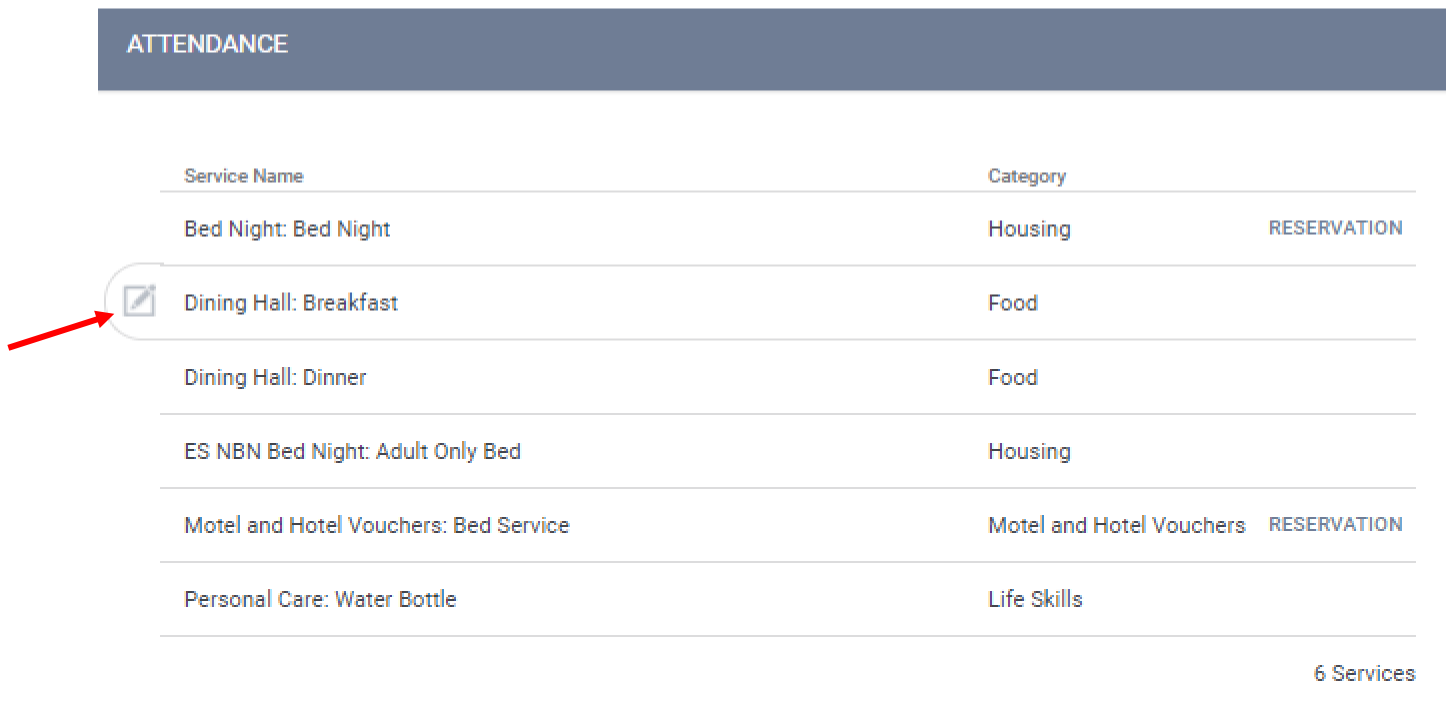
Manage Client Attendance from Attendance Screen

Enter client's (if applicable) *Non-Cash Benefits* and *Health Insurance* then click Save & Close
Click on the Launcher menu (red) and select the *Attendance* icon (blue). This will take you the Attendance screen.



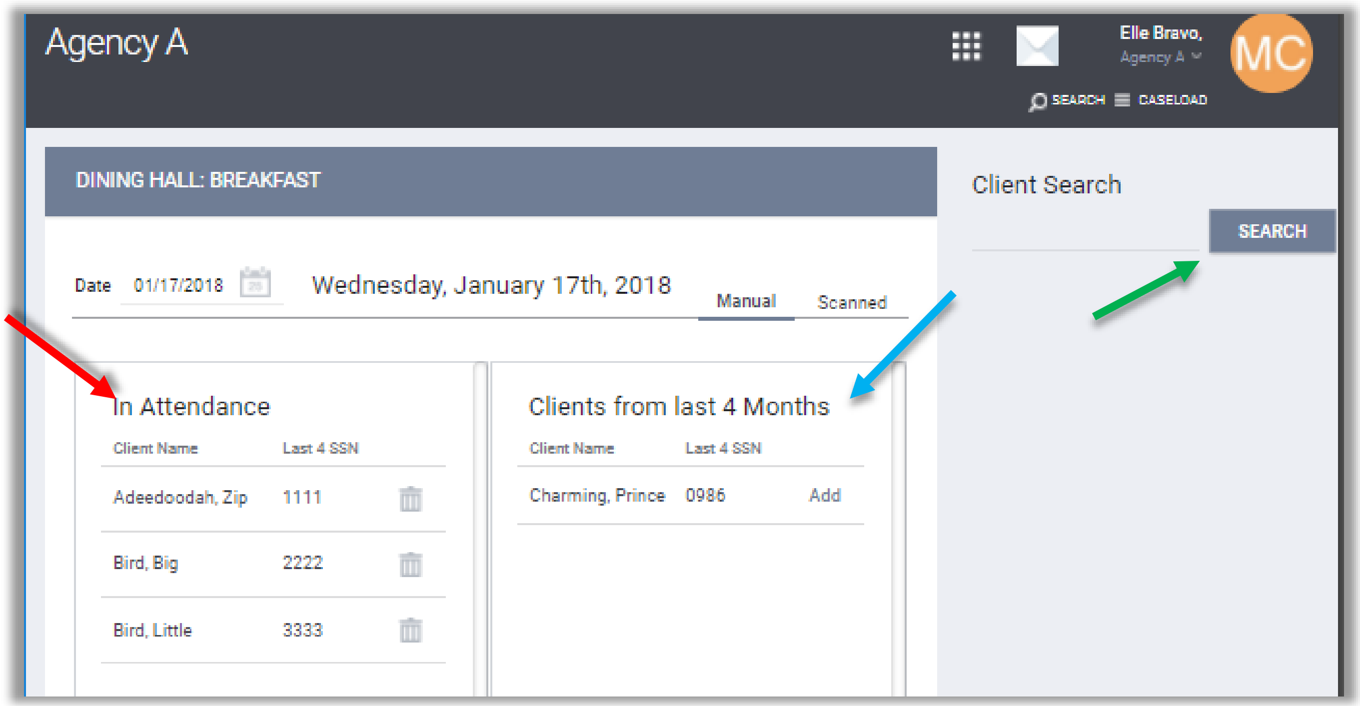
Attendance Screen

From the Attendance Screen, you will find a list of the attendance-based services in your agency. Select the *Manage* (red) icon that appears to the left of the service name you wish to modify or view. After selecting *Manage,* you will be taken to the attendance screen for that particular service.



Service Attendance Screen

Service Attendance Screen will automatically default to the current date. You can change the date by selecting the calendar icon. The Screen will adjust to list the attendance information for the given date.



In Attendance (red)

This is where you will place the clients who received the service on the given date.

Clients from last 4 Months: (blue)

Lists of clients who have received the service at any point in time during the past 4 months.

Client Search: (green)

You can search a client here based on the client search guideline. This will display the clients who have not received the service within the last 4 months.

Documenting Client Attendance

There are three ways to document client attendance:

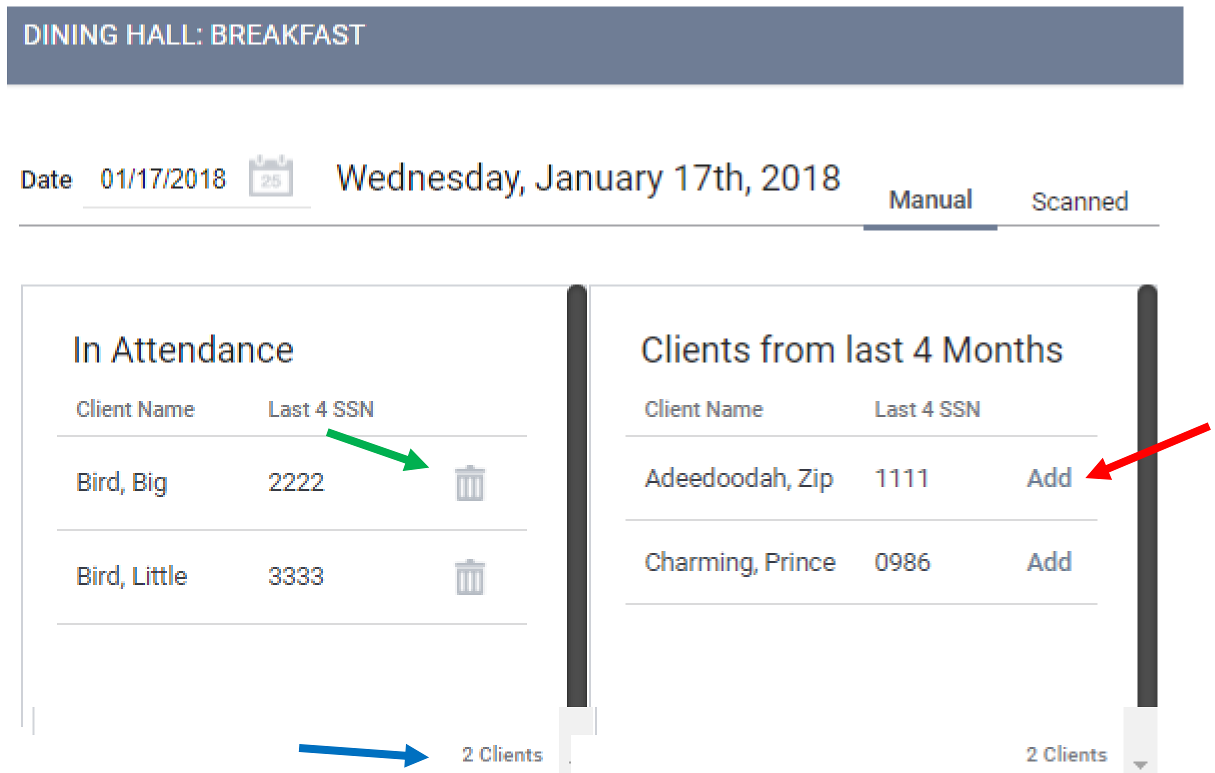
- Add Names from Client List
- Client Search Box
- Unique Identifier Scan Upload

Add Names from Client List

To manually *check in* a client, select *Add* link (red) next to their name as it appears in the database of names to the right. Client count on the bottom of the Service Attendance screen (blue) will change accordingly and in real time.

**When the client is placed in this area, a service record is automatically saved to the client.*

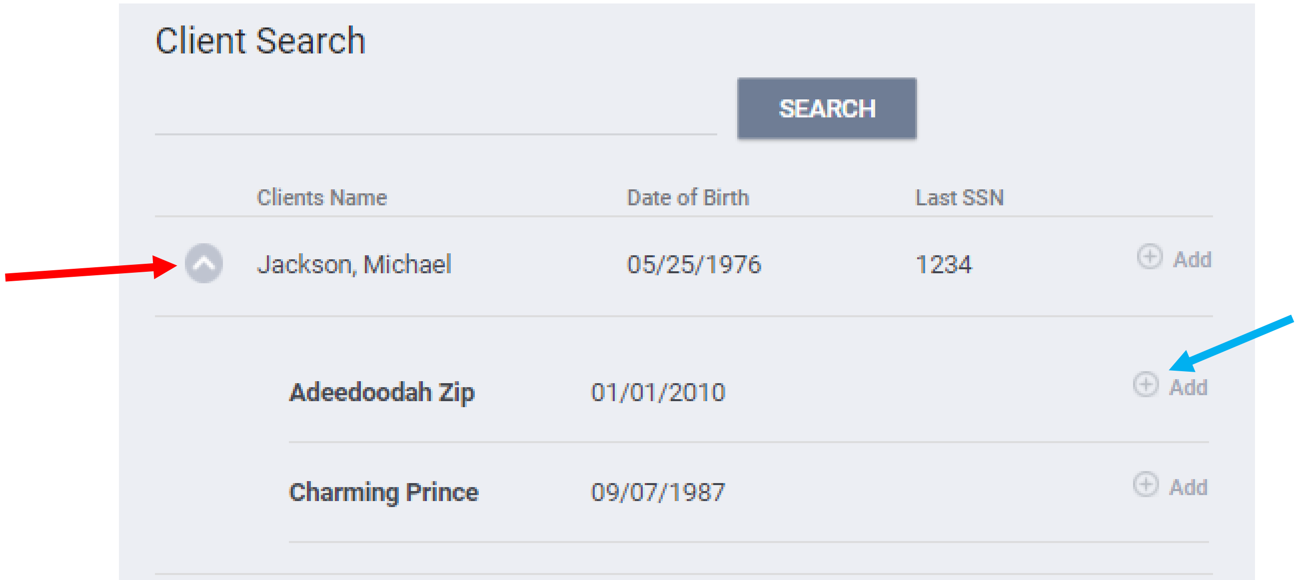
This service can be viewed in the client's history tab.



If necessary, you can move the client from the daily attendance list by selecting the trashcan icon (green) next to the client's name. This will return the client to the database of names; it will not completely delete them from the list.

Client Search Box

Use the *Client Search Box* to add a client who has not received the service during the last 4 months, or to check in multiple household. To add members of a household, select the icon to the left of the client name (red). A list of their associated household members will drop down. Select *Add* (blue) to check in these household members.



**If the service transaction requires a program enrollment, the Attendance Tool will not allow clients who are not enrolled in the program to be checked in. Message will say:* Not Enrolled

(green) *Client received the service at any point in time during the past 4 months but is no longer enrolled in the Program.*