HELP MANAGEMENT INFORMATION SYSTEM

Santa Barbara County Continuum of Care
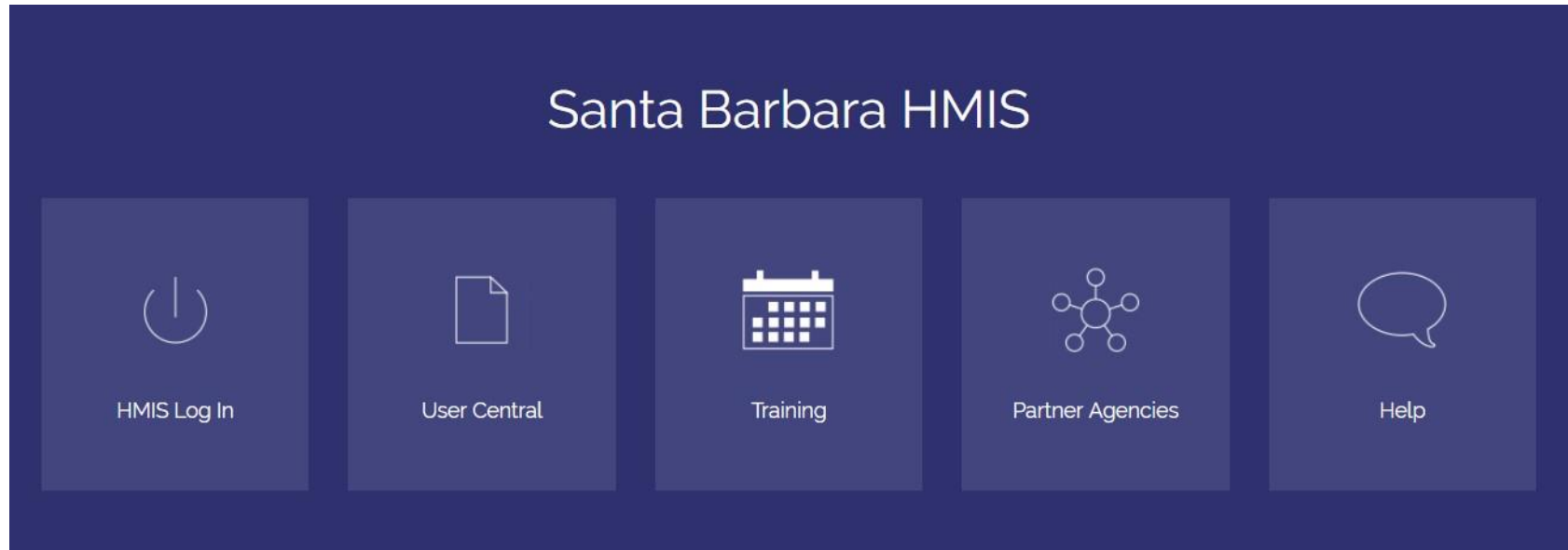
July 2018

HMIS 5.12 workflow

Adding an Interim Review

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Access HMIS Web Portal

Access the Santa Barbara portal at: http://ctagroup.org/santa-barbara-hmis/

The Five (5) Icons:
- **Login to HMIS**
- **User Central: documents and forms**
- **Training: sign up for a training or access online video library**
- **Partner Agencies: List of Agencies that use HMIS**
- **Help: click to send a Help Request**

Adding an Interim Review

To add an Interim Review, log into ServicePoint and search for the client.
From the *Client Information* screen, click **Entry/Exit** tab (red arrow).

Click on **Interims** (blue arrow) icon and **Interim Reviews** popup window will appear. Here, click *Add Interim Review* (black arrow).
*Note- The number on the bottom of the icons indicate the number of reviews made (gold arrow).

Adding an Interim Review

Under *Interim Review Data*, select the *Interim Review Type*: 30-day, 60-day, 90-day, 120-day, Annual Assessment, or Update.
To enter an Interim Review for the entire Household, click on the box beside each name (blue arrow).
Verify the *Review Date,* then click 'Save and Continue'.

If no change needs to be made, click 'Save & Exit'. Then go to page 13.

Adding an Interim Review-Select an Assessment

You must select *HUD CoC & ESG Update* in the **Select an Assessment** field to update a review for the adults in the household.
If the client is a child or the household has a child, you must first go to **Select an Assessment** field (red arrow) and click on **Child Intake** (blue arrow) before editing.
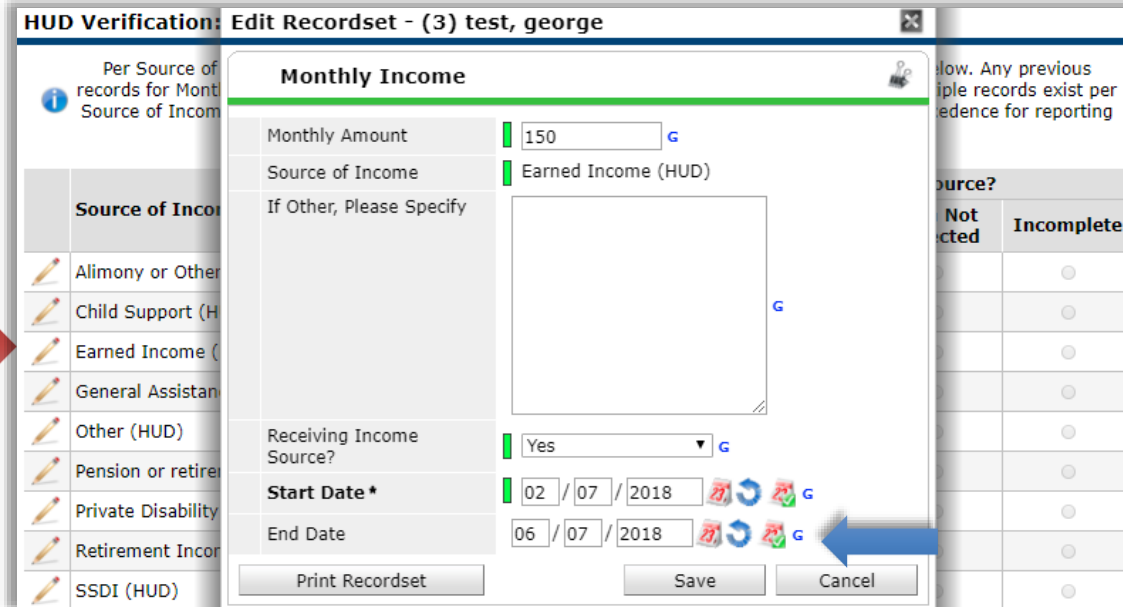
Adding an Interim Review-Monthly Income

After clicking **Save & Continue**, the screen will display *Entry / Exit Interim Review*. Here is where you can complete client updates.

If the client already has income data entered into HMIS, verify the income is correct by answering **Income from Any Source** question and by clicking on: **HUD Verification** ✅ .

After clicking on '**HUD Verification**', click the pencil icon (red arrow) if changes need to be made to any source of income.
If there has been a change to a source of earned income (regardless if it was an increase or decrease) enter an end date one day prior to the start date of the client's current income. *For example, if the client was previously earning $150 per month and then started earning $200 per month on 6/8/18, enter an end date of 6/7/2018 for the $150 per month recordset (blue arrow).*

 Click save.

If the date of the change to the client's earned income is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current income.

Adding an Interim Review -Monthly Income-Continued

After clicking save, you will notice that the marking will change from **Yes/No** to **Incomplete** (red arrow) and the **HUD Verification** icon will change from green check mark to a red triangle (red arrow).

Change the *Receiving Income Source* (blue arrow) response to **Yes** if the client is currently receiving income or **No** if the client is no longer receiving income. The *Add Recordset* pop up window will appear if you select **Yes**. Here, you will enter the client's new income change in the *Monthly Amount* (black arrow), verify or edit the start date, then click **Save & Exit**.

The HUD Verification will change to indicating that there is no missing data.

If the date of the change to the client's earned income is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current income.

Adding an Interim Review - Non-Cash Benefits

Only items that are HUD approved choices will appear in the verification window. If the client already has non-cash benefits data entered into HIMS, Verify the data is correct by answering *Non-cash benefit from any source* question and clicking on the

HUD Verification ✅. Then click on the appropriate **pencil icon** (red arrow) if changes need to be made. If there has been any change to a non-cash benefit, enter an end date of one day prior to the start date of the client's current non-cash benefit.

For example, if the client had not been receiving Food Stamps and began receiving $175 in Food Stamps on 6/8/18, enter an end date of 6/7/18 for the No Food Stamps Recordset (blue arrow).

HUD Verification: Non-Cash Benefits for 06/08/2018

ⓘ Per Source of Non-Cash Benefit, the current records for Non-Cash Benefits as of 06/08/2018 are displayed below. Any previous records for Non-Cash Benefits not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Non-Cash Benefit as of 06/08/2018, records containing "Yes" values will be displayed and take precedence for reporting purposes.

| First | Previous | Next | Last |

HUD Verification ✅

Source of Non-Cash Benefit	Receiving Benefit?			
	Yes	No	Data Not Collected	Incomplete
Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	○	◉	○	○
Special Supplemental Nutrition Program for WIC (HUD)	○	◉	○	○
TANF Child Care Services (HUD)	○	◉	○	○
TANF Transportation Services (HUD)	○	◉	○	○
Other TANF-Funded Services (HUD)	○	◉	○	○
Other Source (HUD)	○	◉	○	○

| Save | Save & Exit | Exit |

| First | Previous | Next | Last |

Edit Recordset - (14133) test2, test

Non-Cash Benefits

| Amount of Non-Cash Benefit | 0 | G |
Source of Non-Cash Benefit	Supplemental Nutrition Assistance Program (Food Stamps) (HUD) ▼	G
If Other, Please Specify		G
Receiving Benefit?	No ▼	G
Start Date *	04 / 01 / 2017	G
End Date	06 / 07 / 2018	G

| Print Recordset | Save | Save and Add Another | Cancel |

Adding an Interim Review - Non-Cash Benefits- Continued

After clicking save, you will notice that the marking will change from *Yes, No, or Data Not Collected* to *Incomplete* (red) and the HUD Verification icon will change from green check mark to a red triangle (red).

Change the *Receiving Benefit* (blue arrow) selection to *Yes* or *No* depending on the change to the client's Non-Cash Benefits. For our example client, select *Yes*. Click Save then click on the Pencil icon to change the amount of the Non-Cash Benefit.

The *Edit Recordset* window will appear. Here you will indicate the client currently receives $175 in Food Stamps (black arrow), verify the start date. Do not make changes to *Receiving Benefit,* this will automatically apply when you clicked **Yes** or **No** for the Receiving *Benefit* (blue arrow). Click **Save**.

The HUD Verification will change to indicating that there is no missing data.

(black arrow)

Adding an Interim Review -Health Insurance

If the client already has health insurance data entered into HMIS, verify the data is correct by answering the *Covered by Health*

Insurance question and by clicking **HUD Verification** ✅ . After clicking *on* HUD Verification, click the pencil icon (red arrow) if changes need to be made to any types of health insurance. If there was a change to the client's health insurance, enter an end date one day prior to the start date of the client's current health insurance status.

For example, if the client previously had no health insurance but obtained MEDICARE as of 6/8/18, enter an end date of 6/7/18 for the pertinent recordset (blue arrow). Then click **Save**.

Adding an Interim Review -Health Insurance-Continued

After clicking save, you will notice that the marking will change from *Yes, No, or Data Not Collected* to *Incomplete* (red) and the HUD Verification icon will change from green check mark to a red triangle (red).

Change the *Covered?* (blue) response to **Yes** or **No** depending on the change of the client's Health Insurance Type. Click **Save.**

If **Yes,** click on the pencil icon to enter more detail on the Health Insurance Type and **Edit Record Set** pop-up will appear. Here, you can enter to specify source of 'Other' option (red arrow) as well as entering HOPWA related information if applicable.
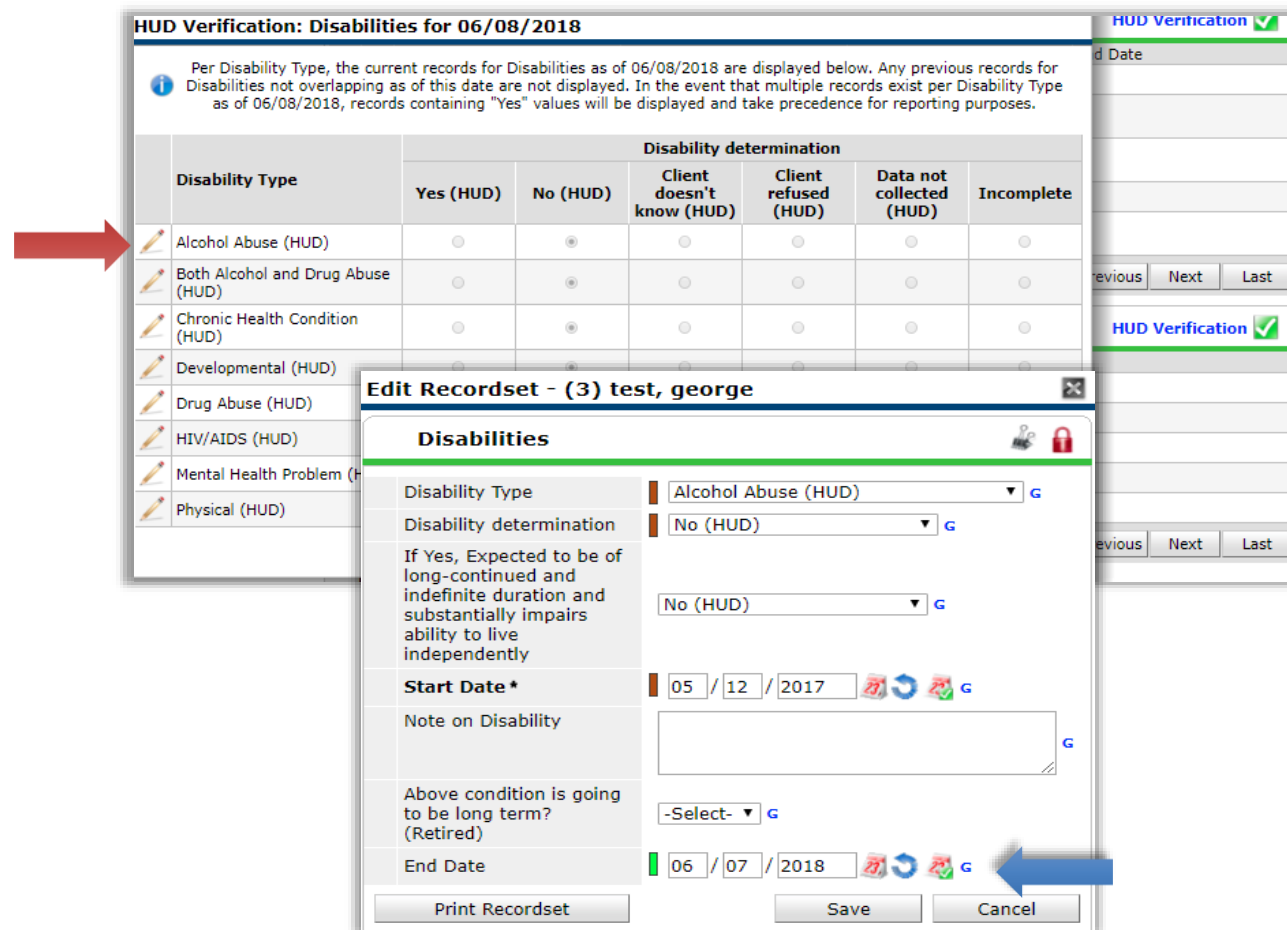
For the example client, you will enter the client's new MEDICARE information then (black arrow). Then click **Save & Exit**.

The HUD Verification will change to indicating that there is no missing data.

Adding an Interim Review - Disabilities

If the client already has disability data entered into HMIS, verify the income is correct by answering the *Does the client have a disabling condition* question and clicking on **HUD Verification** ✅. After clicking on HUD Verification, click on the pencil icon (red arrow) if changes need to be made to any type of disability data. If there has been a change regarding a client's disability, enter an end date one day prior to the start date of the client's current disability data.

*For example, if the client previously did not have any disabilities and then Alcohol Abuse was indicated 6/8/18, enter an end date of 6/7/2018 for the Alcohol Abuse "No" recordset (blue arrow). Then click **Save.***

Adding an Interim Review - Disabilities - Continued

After clicking save, you will notice that the marking will change from *Yes (HUD), No (HUD), Client doesn't know (HUD), Client refused (HUD),* or *Data not collected (HUD)* to *Incomplete* (red arrow) and the HUD Verification icon will change from green check mark to a red triangle (red).

Select the *Disability determination* selection to from *Yes (HUD), No (HUD), Client doesn't know (HUD), Client refused (HUD),* or *Data not collected (HUD)* depending what change of disability the client has (blue).

Add Recordset pop up window will appear if selected *Yes(HUD).*
Answer the questions by selecting the answers from the drop down options.

For the example client, the start state is 6/8/18.

Click **Save**.

The HUD Verification will change to indicating that there is no missing data.

Adding an Interim Review- Complete

After you verify or edit your client's annual assessment for the Interim Review, click **Save & Exit**. An **Interim Reviews** popup window will appear showing you all the Interim Reviews for the client.

If it was a household, you can see the household size in **Client Count** (red arrow). If you click on the magnifying glass icon, an *Entry/Exit Review Client Count* (blue arrow) popup window will appear showing you the household.

Additional Assistance

For any additional technical assistance

Email us: helpdesk@ctagroup.org

OR

By visiting our **Website:**   → https://ctagroup.org/santa-barbara-hmis