HELP MANAGEMENT INFORMATION SYSTEM

Santa Barbara County Continuum of Care

September 2018

HMIS 5.12 workflow

Adding New Clients

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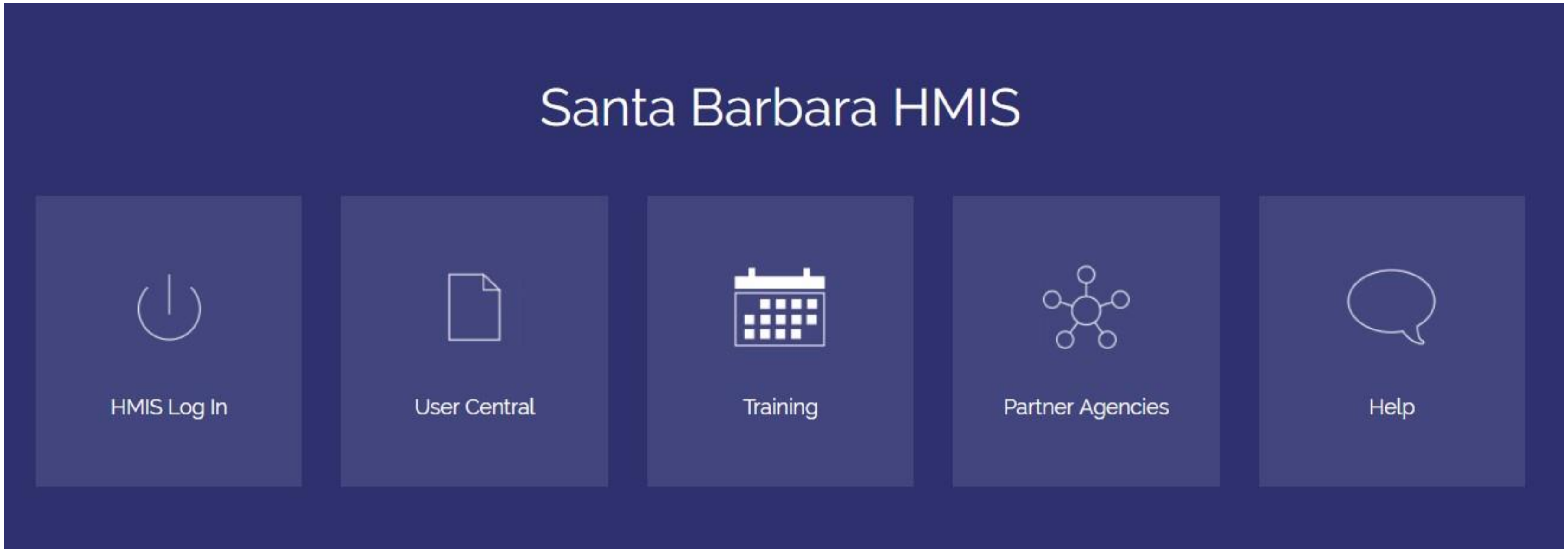
Access HMIS Web Portal

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

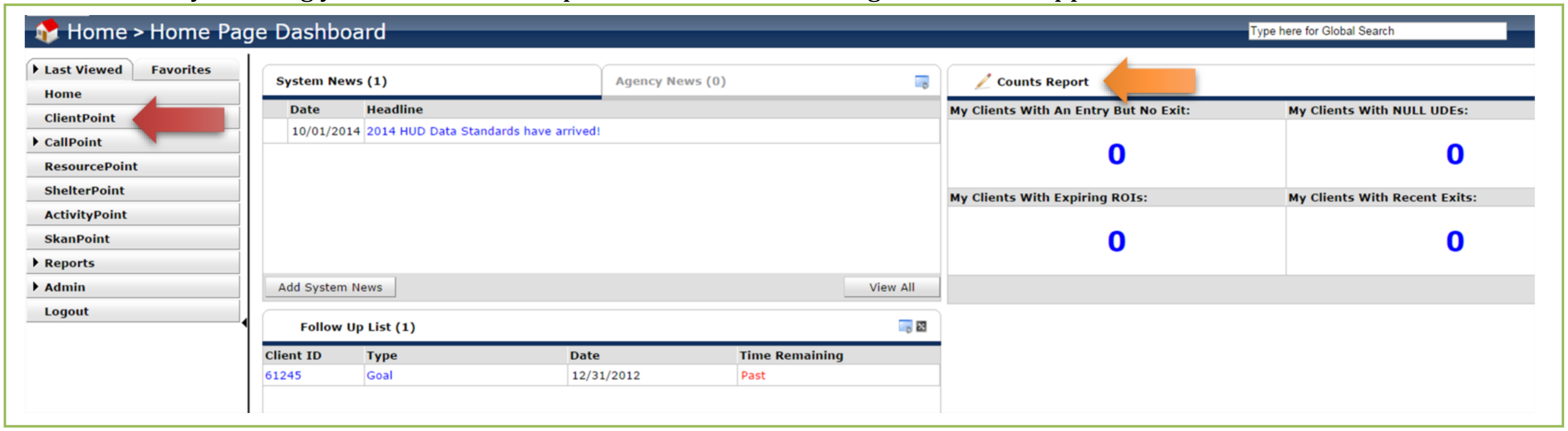


The Five (5) Icons:

- **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**

Access Home Page Dashboard

Access HMIS by entering your username and password. Your Home Page Dashboard appears



Menu Bar (left side of screen)

Click to access **Client Point** (red arrow) or other available option. Example: click **SkanPoint** to enter client data using bar-coded client ID cards.

Note: modules displayed in this screenshot may not display on your home page. Available modules depend on your access level and the modules your agency has selected to use.

Counts Report (orange arrow)

A Counts Report provides a quick and easy way to keep tabs on your clients. If a number appears on a report: click on that number to see your clients.

The Counts Report section usually comes with these 4 reports:

- **My Clients with an Entry but no Exit**: details how many clients are currently enrolled in your program.
- **My Clients with Null UDEs**: details clients with one or more missing UDEs (universal data elements)
- **My Clients with Expiring ROIs**: details clients whose ROI (release of information) expires within a month
- **My Clients with Recent Exits**: details clients who have exited your program within the past month

Other Counts reports are available. Check with your Agency Administrator for details.

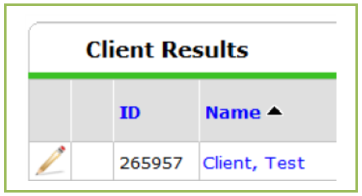
Client Point: Client Search page

Click **Client Point** to access the Client Search page.

Client already in HMIS?
Search for client, by:

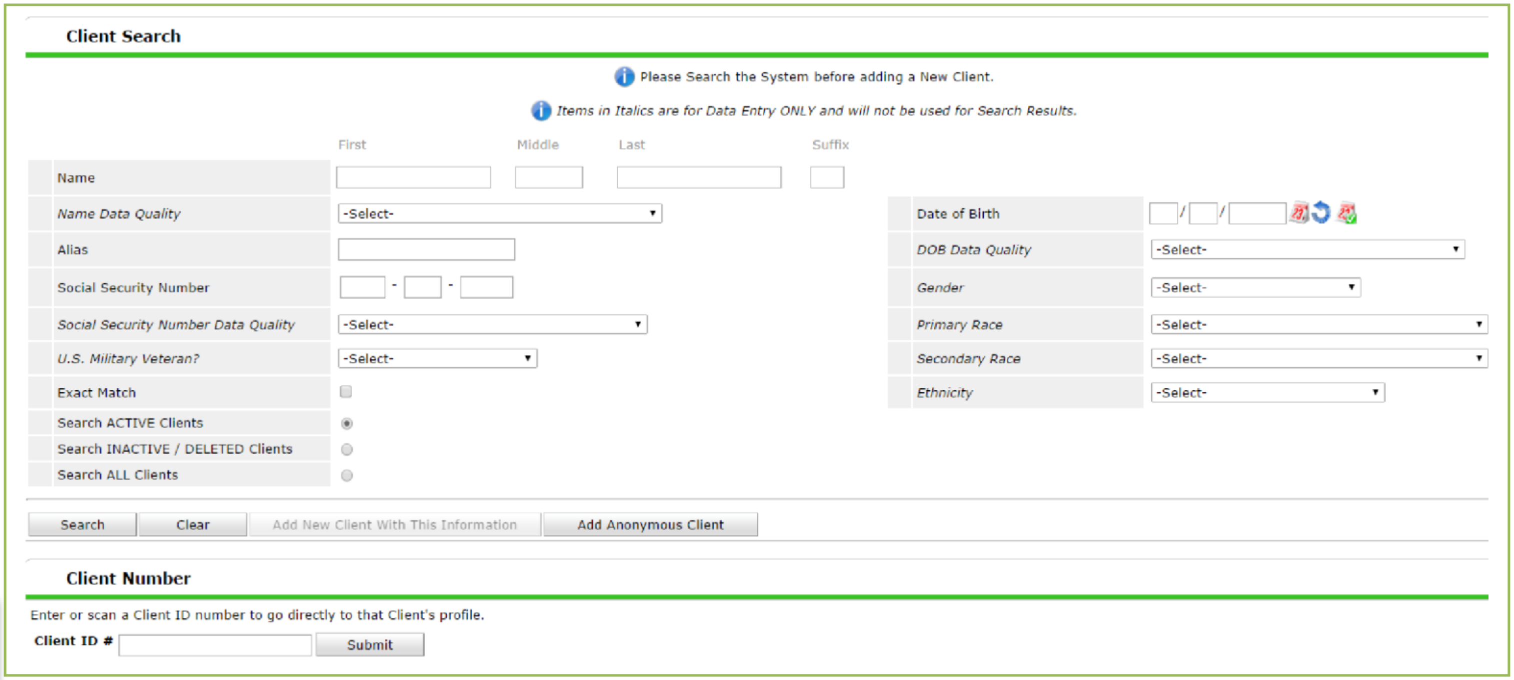
- **Name OR**
- **SSN OR**
- **Client ID #**
- Click **Exact Match**
- Click **Search**

If there is a match:
Client's name will appear at bottom of screen



No match?
Client not in HMIS?

See next page for details on how to add a new client



Did you find a match? Skip to page 11 Release of Information.

Adding a New Client

Enter as much client information as possible. In this screenshot, the following client information was collected:

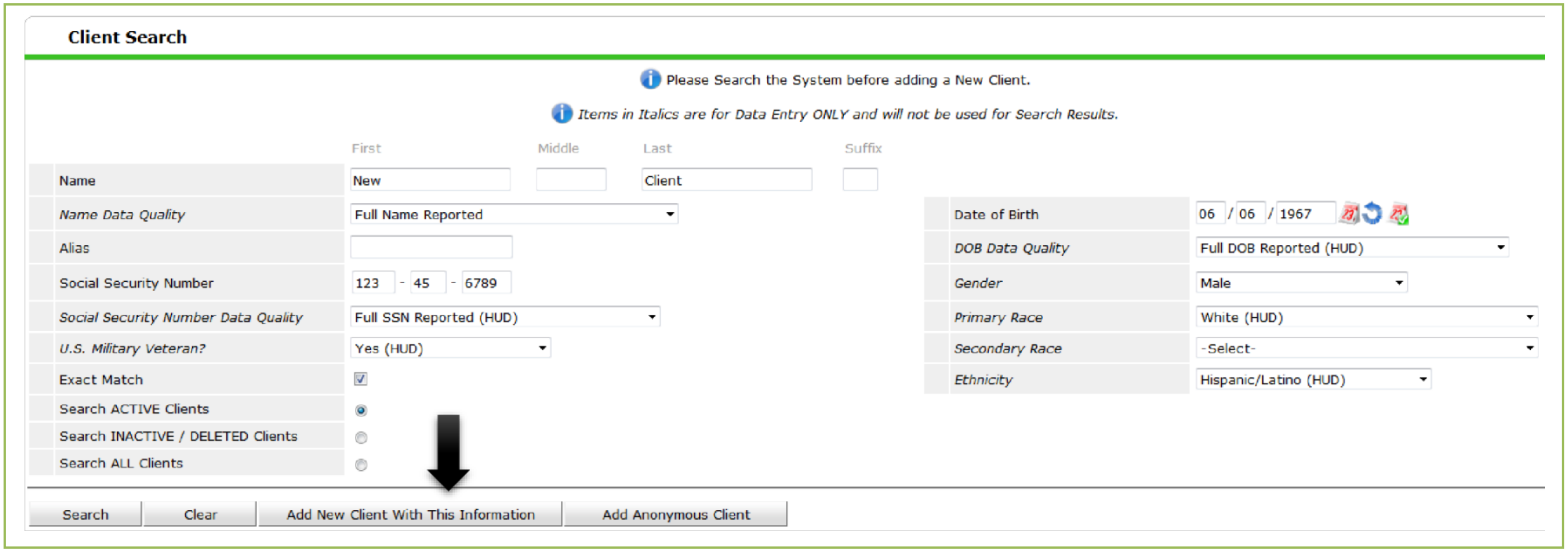
Name
Name Data Quality
Social Security Number
Social Security Data Quality
US Military Veteran?

Date of Birth
DOB Data Quality
Gender
Primary Race
Ethnicity

<u>Note</u>

Client doesn't know?
Select 'Client doesn't know'

Client refuses to answer?
Select 'Client refused'



Ready to add new client?

- Click **Add New Client With This Information** (black arrow)
- <u>Pop up window appears. Select</u> **Add Client Only**
- Page refreshes to client's Summary page

Add New Client With This Information greyed out? (not able to add client)

- You did not search for this client before trying to enter as a new client
- Click **Search** to see if client is in HMIS
- Client not in HMIS? **Add New Client With This Information** should no longer be greyed out

New Client: Summary page (top of page)

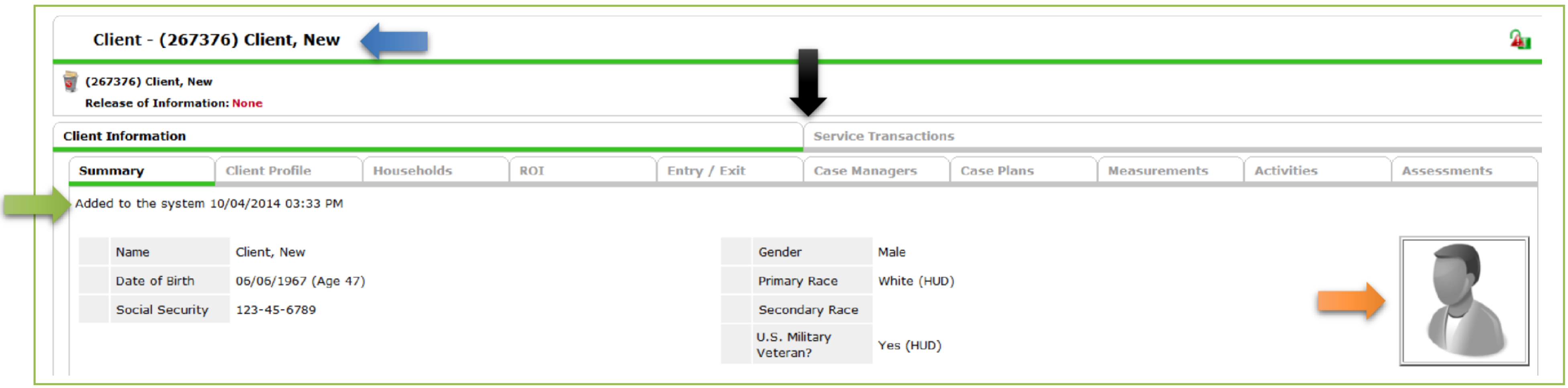
Client Information displays on the top half of the Summary page:

- Client's HMIS number and Name (blue arrow)
- Menu bar (black arrow):
  - Click on a tab to access that tab's function
  - Example: click **Client Profile** to update the client's record and demographic data fields
  - **Photo** icon (orange arrow)

How to add client's photo

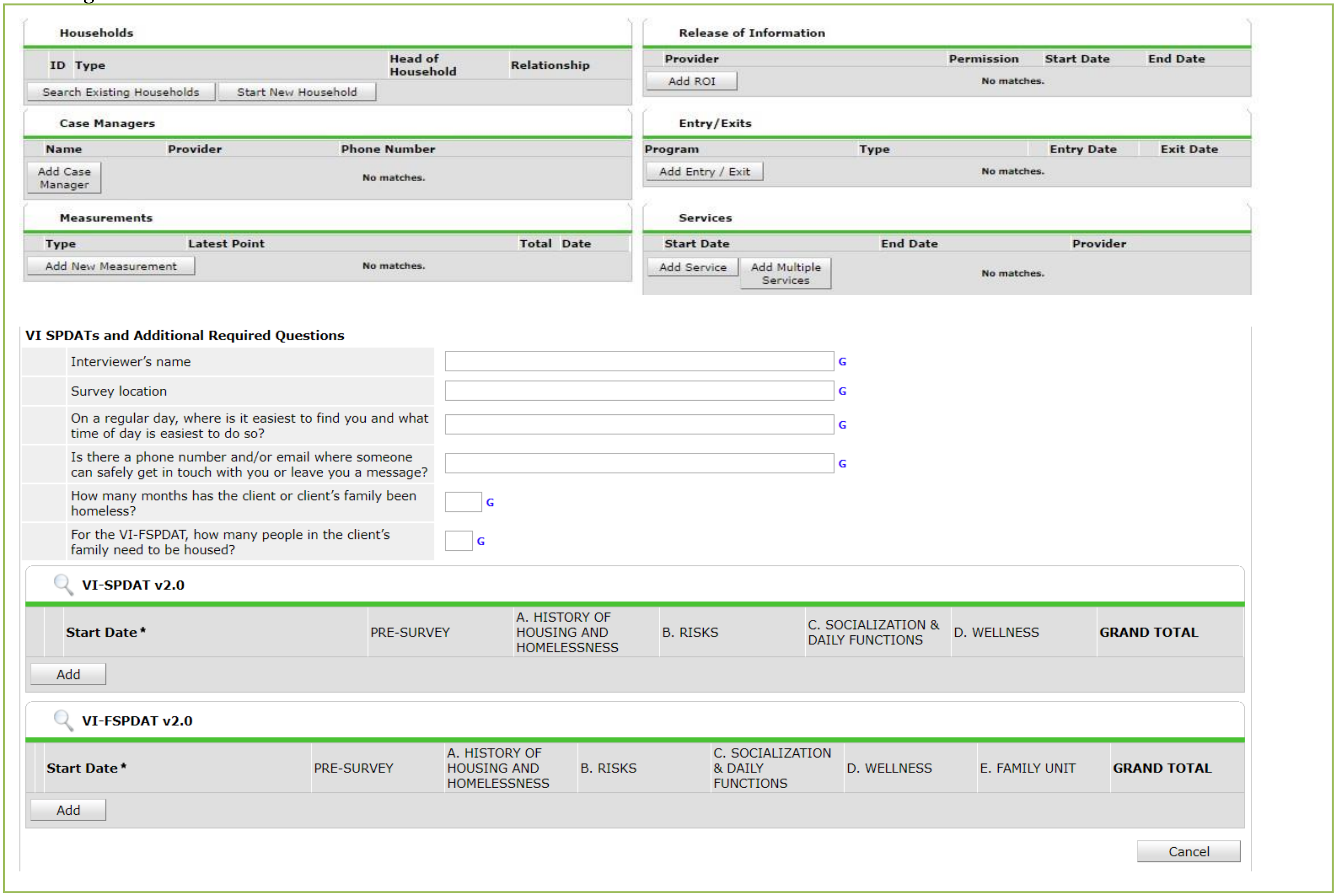
- To add photo: click on **Client Profile** tab
- Click Change (under the Photo icon)
- Click **Browse**. Select photo. Click **Upload**

- **Client Record (**green arrow) ○ Details the date and time client was added to HMIS
  - Details Client Record data (examples: Name, Date of Birth)



New Client: Summary page (bottom of page)

The boxes are in order of how best to enter new client data. A typical configuration includes the following:



- **Households**: create a new household or update an existing household
- **Release of Information**: add an ROI for client or for the entire household
- **Case Manager**: assign yourself or another person as the case manager. Adding a case manager
- **Entry/Exits**: add a project entry or project exit for a client or for the household. Access a project entry to add an Interim, Update or Annual Assessment
- **Services**: add a service transaction for a client or for a household
- **Restricted ROI**: enter client restrictions here, then contact CTA and give detail of the restrictions, before entering in any information into the system
- **VI-SPDAT v2.0**: updated VI-SPDAT Assessment tool
- **VI- F SPDAT v2.0**: Family Assessment tool

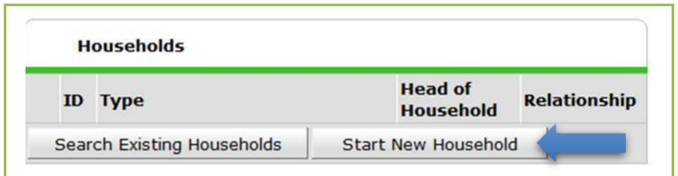
*NOTE- The boxes you can see and their order varies on agency preference, if you want to modify them please have your agency admin submit a case

Creating the Household

Client single? Skip this page. Go to page 11: Release of Information.

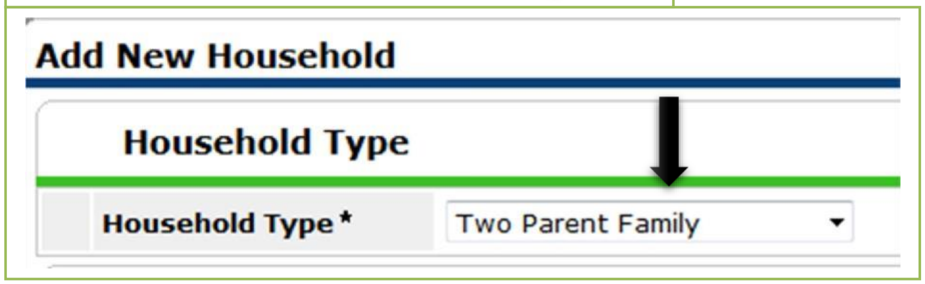
Client in a Household? Best practice is to add each family member into HMIS by following the steps outlined on pages 9 & 10.

Write down the HMIS # for each family member added. Go the Head of Household's Summary page.



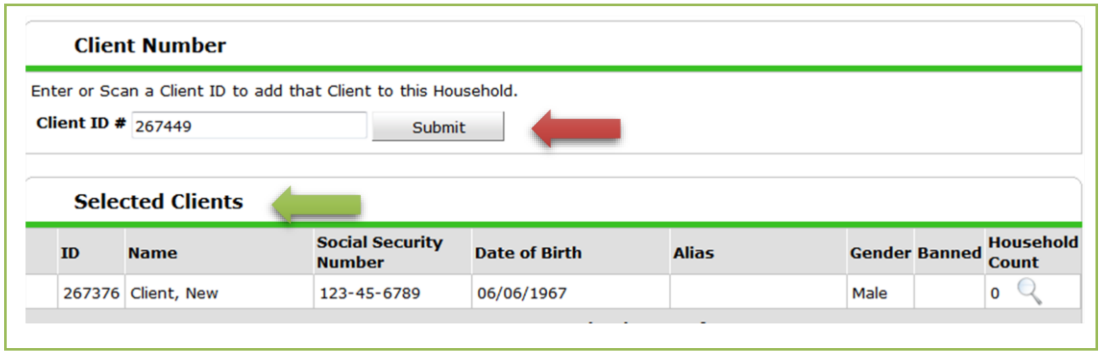
Click **Start New Household** (blue arrow)

New page appears. At the top of the page **is Household Type**.



Select best match (black arrow).

Then scroll down to bottom of page to **Client Number** section.



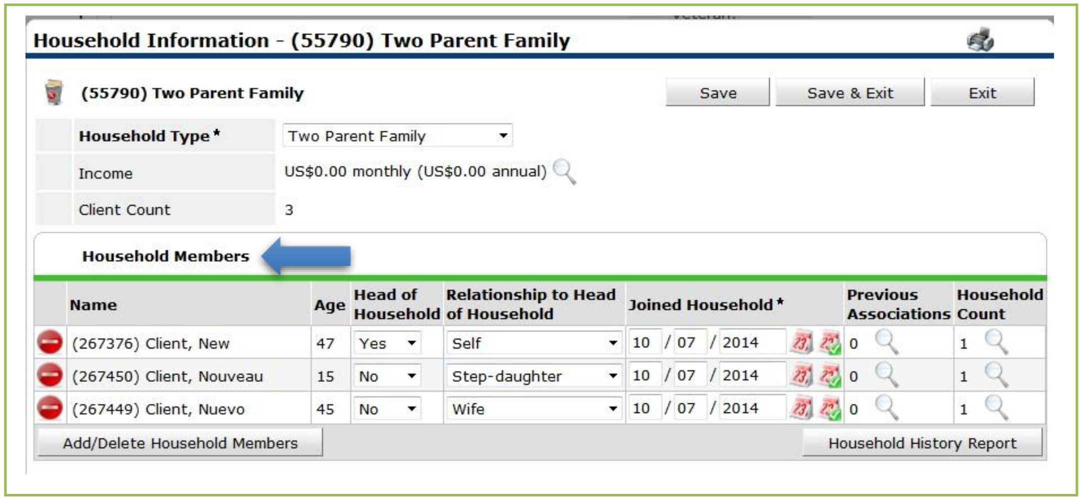
Add the HMIS number of the client to add to the Household. In this example HMIS # 267449 was entered (red arrow).

Click **Submit**. Client will appear in **Selected Clients** (green arrow)

Need to add more members? Enter HMIS # in Client ID #, then click Submit (red arrow)

Finished adding members? Click **Continue**.

Creating the Household



Clicking Continue takes you to the **Household Information** page

Members appear in the **Household Members** section (blue arrow).

Select Head of Household. Then select the relationship to head of household for each family member.

In this example:
26736 is the Head of Household
267450 is the Step-daughter
267449 is the Wife

Once relationships have been correctly defined: click **Save & Exit**

Pop-up window appears. Click No.

How to add client data will be covered later in this manual.

Clicking No returns takes you to the Summary page of the Head of Household. Household information appears in the **Households** box.

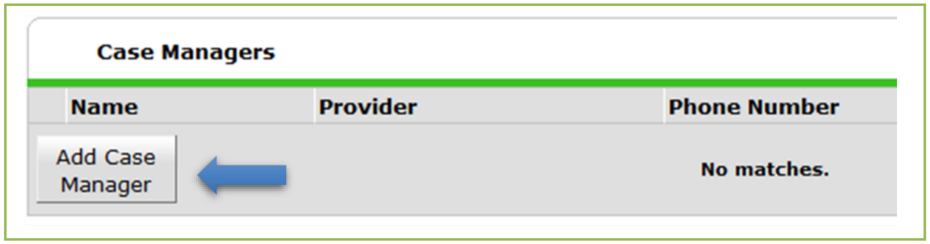
Open HMIS Release of Information

Please enter a client's ROI into HMIS in accordance with the separate "Adding an ROI" workflow document, available on the HMIS portal.

Case Managers

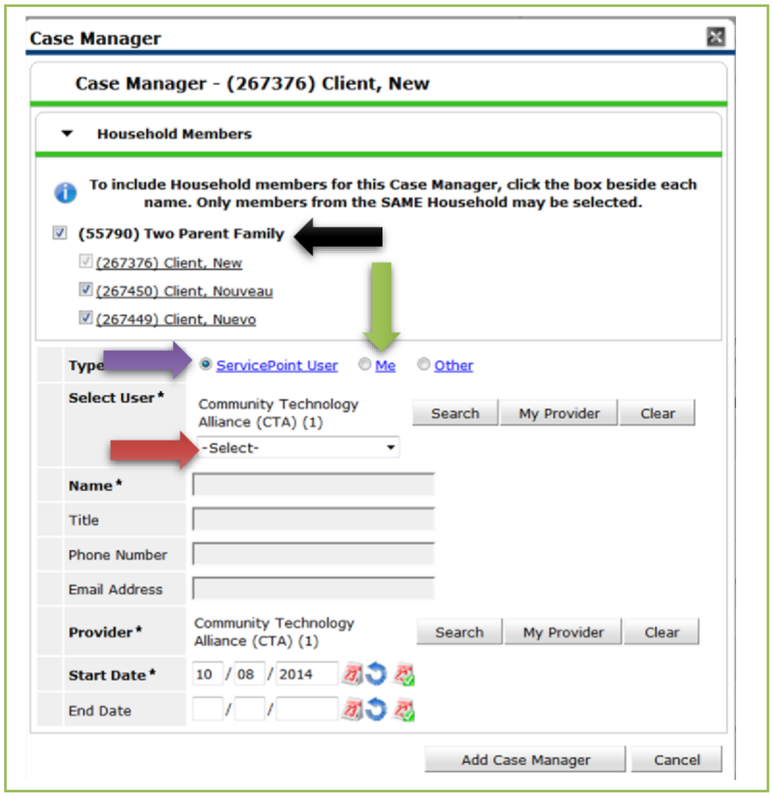
Assigning yourself (or other person in your agency) as the case manager activates the Counts Reports function.

A client may have several case managers at multiple agencies. Knowing who a client's case managers are allows for collaboration in providing services to the client.



Click **Add Case Manager** (blue arrow)

Case Manager page appears.



Client in a household?
Click to include all household members (black arrow).

Click Me (green arrow) to add yourself as the case manager, **OR** click **ServicePoint User** (purple arrow) to select someone else from your agency to be the case manager.

If click **ServicePoint User**: select the case manager from the drop down list (red arrow).

Name: the case manager's name appears once a case manager is selected.

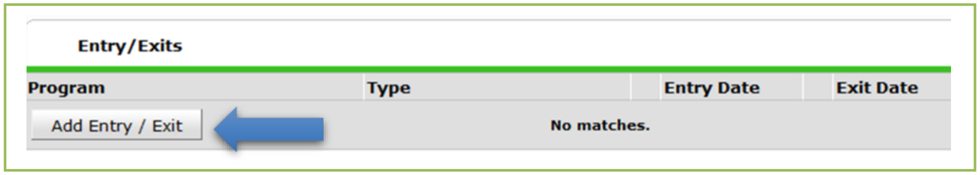
Title/Phone Number/Email Address: this information will appear if this information was added to their HMIS license.

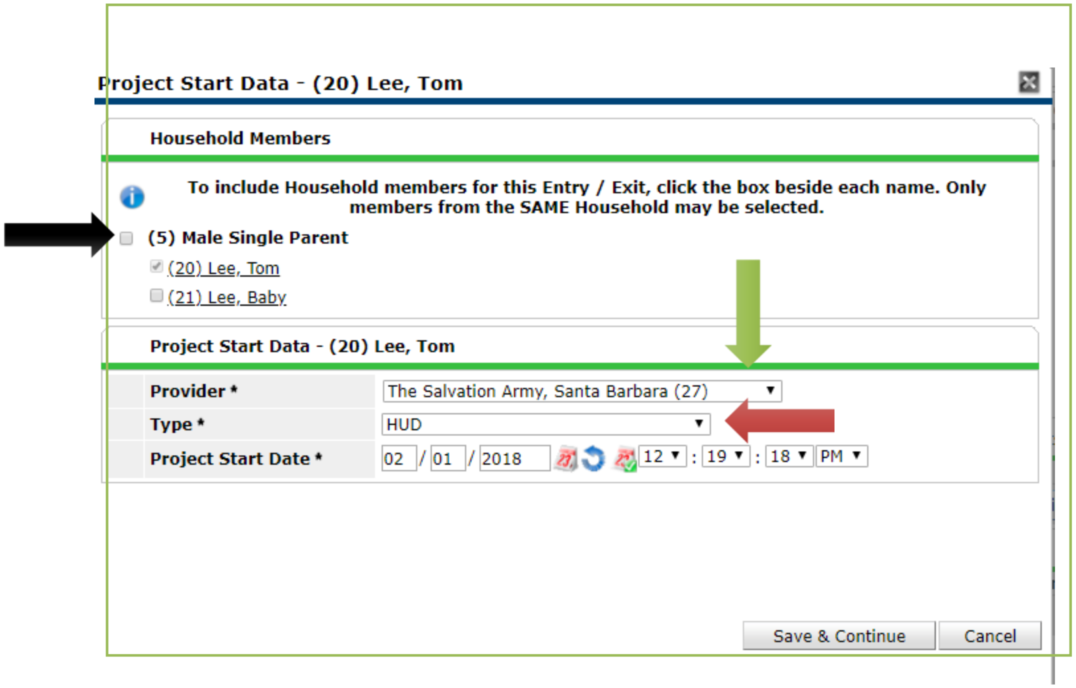
Click **Add Case Manager.**

You will be returned to the client's Summary page.

Entry/Exits

Click Add Entry/Exit (blue arrow) The Entry Data page appears





Click **Save & Continue**

Client in a household? Click the box to add all household members to the project entry (black arrow).

Provider: defaults to the provider you are in.

Have access rights to enter data in other providers?

Need to change the Provider?

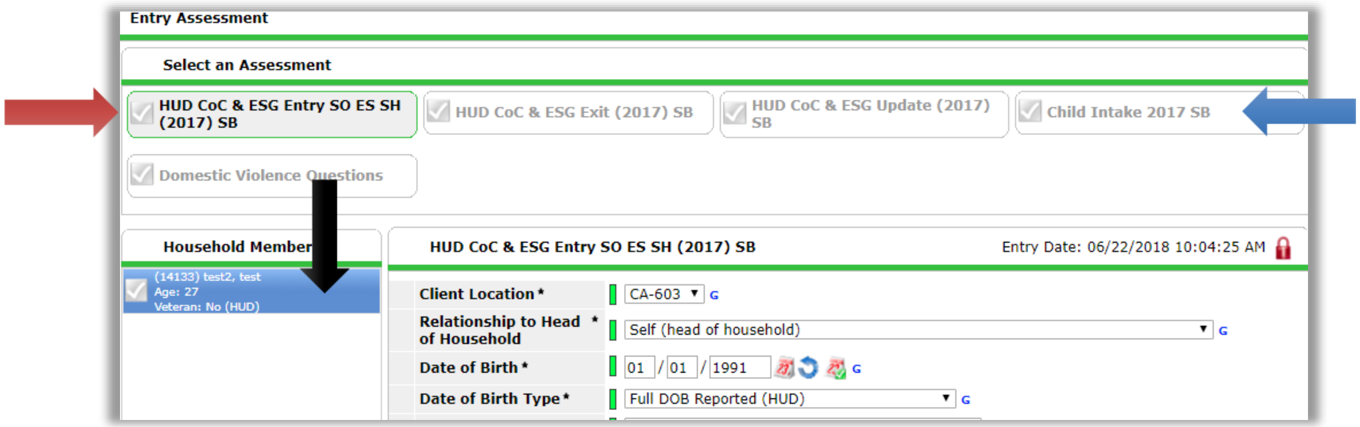
Select the correct Provider from the drop down menu (green arrow)

Type: select **HUD** (red arrow), unless you have been instructed to select something else (example: SSVF clients must select VA; PATH clients must select PATH)

Entry Date: defaults to today's date. Change date if need to change to an earlier date.

The **Entry Exit Data** page appears (see next page for details)

Entry/Exit Data: Intake



After clicking **Save**, the page refreshes.

New Client (black arrow) has a green checkmark. This means you have verified their demographics as accurate.

New Client is highlighted in blue. This means you are in New Client's file.

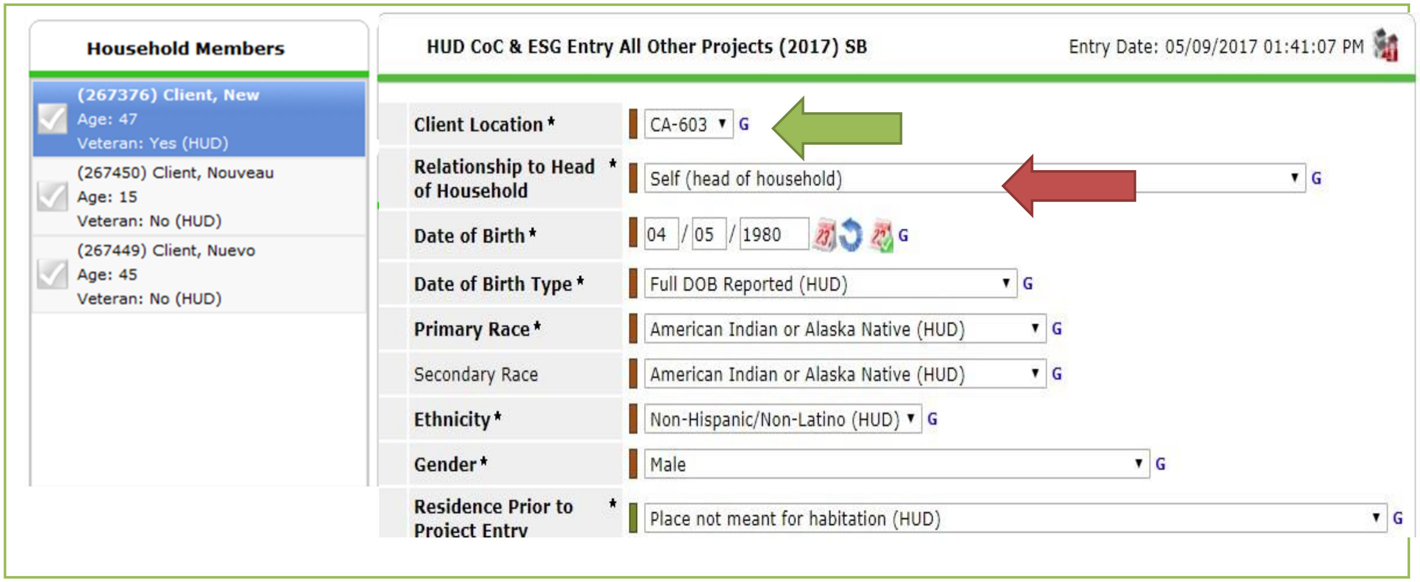
Next Step: Enter Intake data.

Client an adult?
Click on **HUD CoC & ESG Entry** depending on your program (red arrow)

Client a child?
Click on **Child Intake 2017 SB** (blue arrow)

Standard Intake

Section 1: Client Location and Relationship to Head of Household



Client Location
Select **<u>603</u>**
(green arrow)

Relationship to Head of Household:
Since **New Client** is the head of household, select **Self** (red arrow)

Remaining data fields:
There should be data in most of these fields since you entered this data on the **Client Search** page. Add or update data as needed.

Scroll down to next section (see next page for details).

Standard Intake

Section 2: Residence Prior to Entry & Housing Status

Examples how the following questions could change:

Residence Prior to Project Entry *	Place not meant for habitation (HUD)
Length of Stay in Previous Place *	-Select-
Approximate date homelessness started: *	/ / G
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 *	-Select- G
Total number of months homeless on the street, in ES or SH in the past three years *	-Select-

Residence Prior to Project Entry *	Hospital or other residential non
Length of Stay in Previous Place *	-Select-
Did you stay less than 90 days? *	G

Residence Prior to Project Entry *	Owned by client, no ongoing housi
Length of Stay in Previous Place *	Two to six nights
Did you stay less than 7 nights? *	Yes G
On the night before did you stay on the streets, ES or SH? *	-Select- G

Select best match for all **bold** data fields

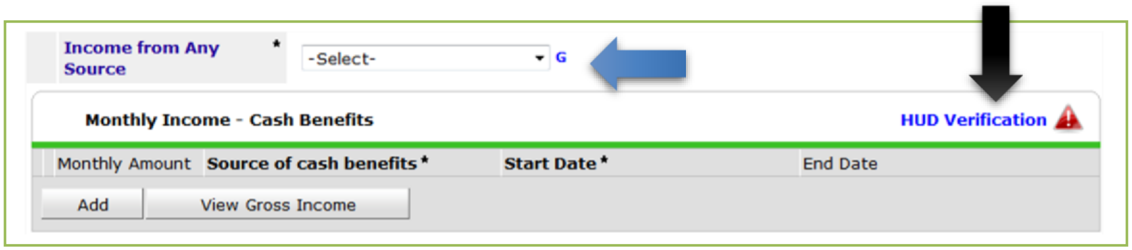
Living Situation:
Depending on what kind of project client is entering into, clients may have different questions. (Emergency Shelter and Street Outreach have different questions form all other programs)
Questions are conditional, so depending how the question is answered the next questions will change.

Housing Move-in Date	/ / G

Housing Move-in Date: Enter the date when the client has moved in to housing (used for permanent housing projects)

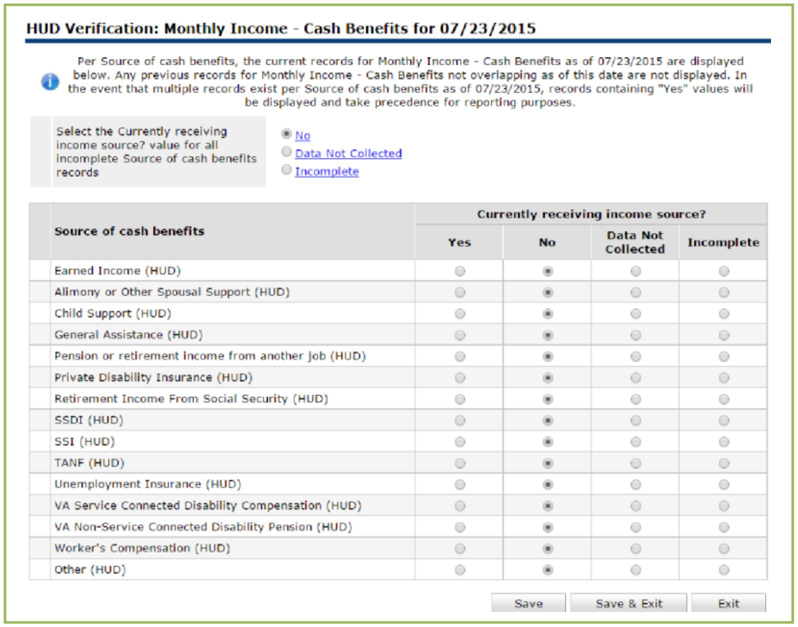
Standard Intake

Section 3: Income



Income from Any Source (blue arrow)

Regardless if client does or does not have Monthly Income Cash Benefits: click **HUD Verification** (black arrow)



Because the majority of the clients will not be receiving all incomes, it's easy to press "NO" (list will populate with "No"s)

Select **Yes** for each Income Source client is currently receiving

A pop-up window appears when **Yes** is selected:

Monthly Amount: enter amount

Receiving Income Source: enter Yes

Start Date: enter date client began earning income; if this is not known, use client's entry date

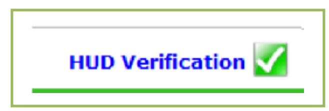
End Date: leave blank

Click **Save & Exit**

Repeat above if **Yes** selected for other **Income Source**

Click **Save & Exit** when done

HUD Verification changes to



What is HUD Verification?

Triangle is red: one or more data fields missing data

Icon is green: no missing data

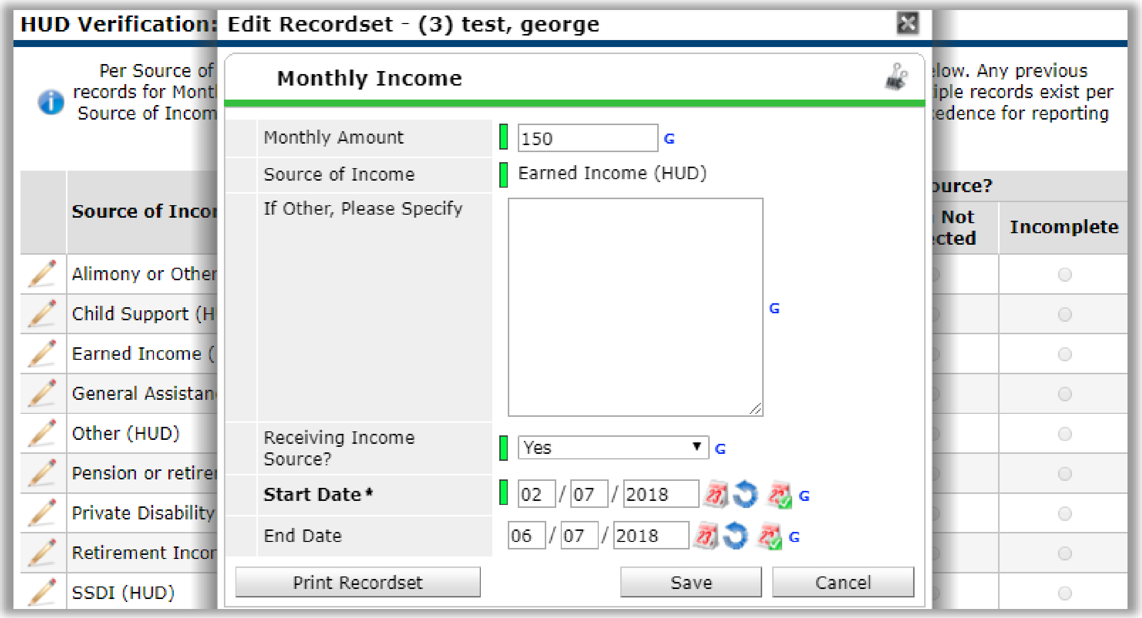
HUD Verification Process-Monthly Income

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: 

.

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).*

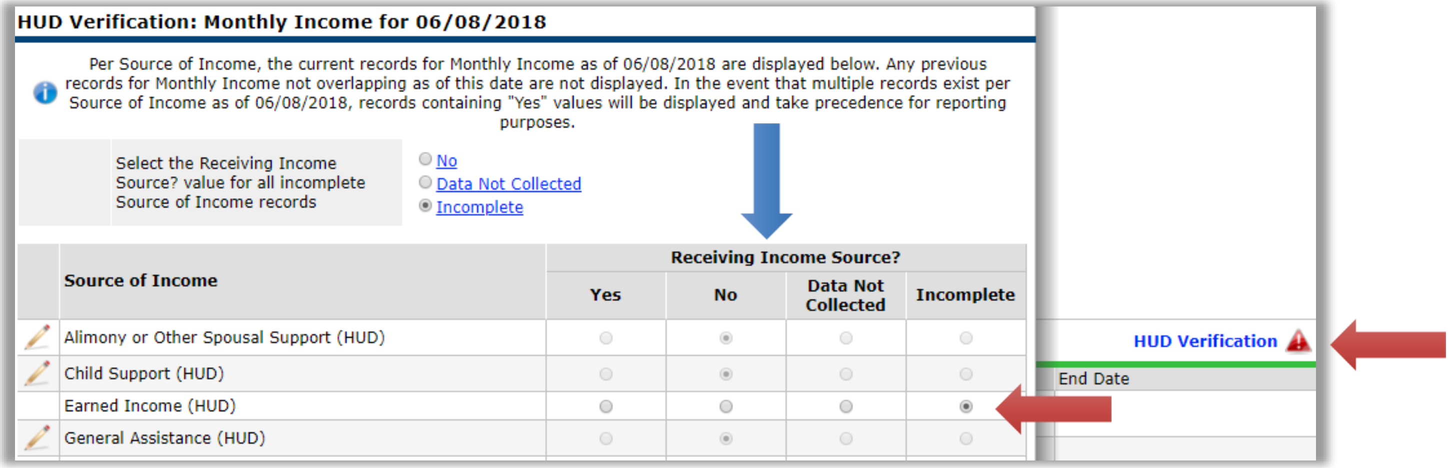
Click save.



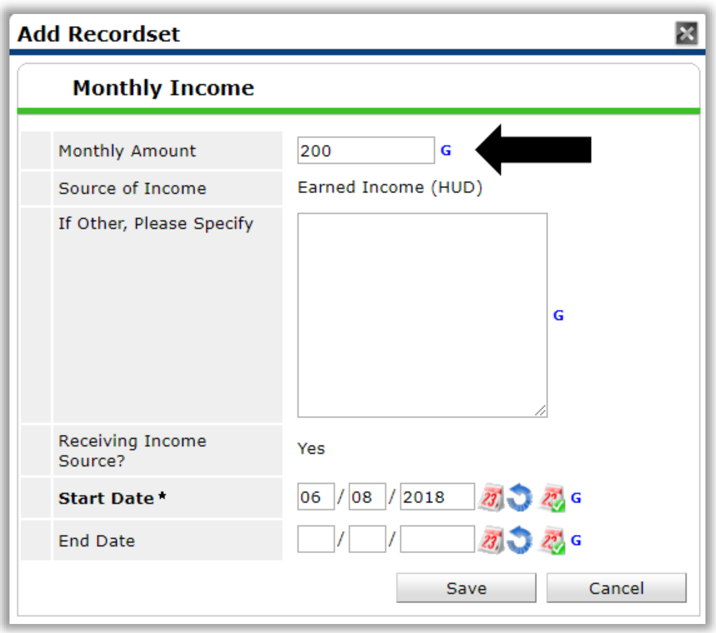
<u>If the date of the change to the client's earned income is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current income.</u>

HUD Verification Process-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**.

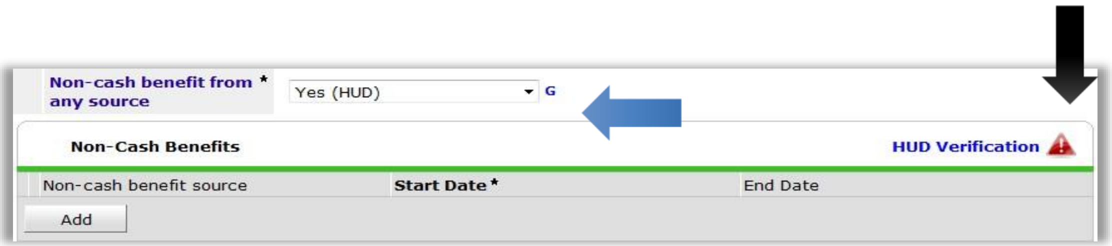


The HUD Verification will change to  indicating that there is no missing data.

<u>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.</u>

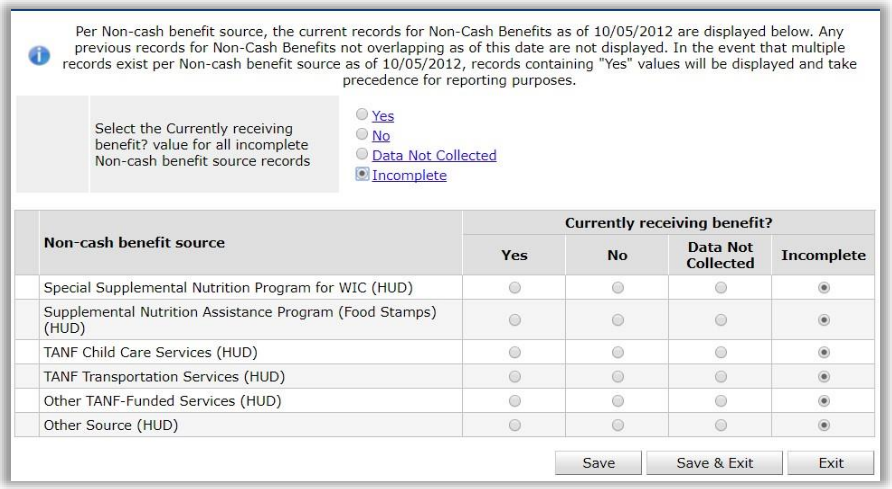
Standard Intake

Section 4: Non-Cash Benefits



Non-Cash benefit from any source (blue arrow)

Regardless if client does or does not have Non-Cash Benefits click HUD Verification (black arrow)



Per Non-cash benefit source, the current records for Non-Cash Benefits as of 10/05/2012 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 Non-cash benefit source, records containing "Yes" values will be displayed and take precedence for reporting purposes.

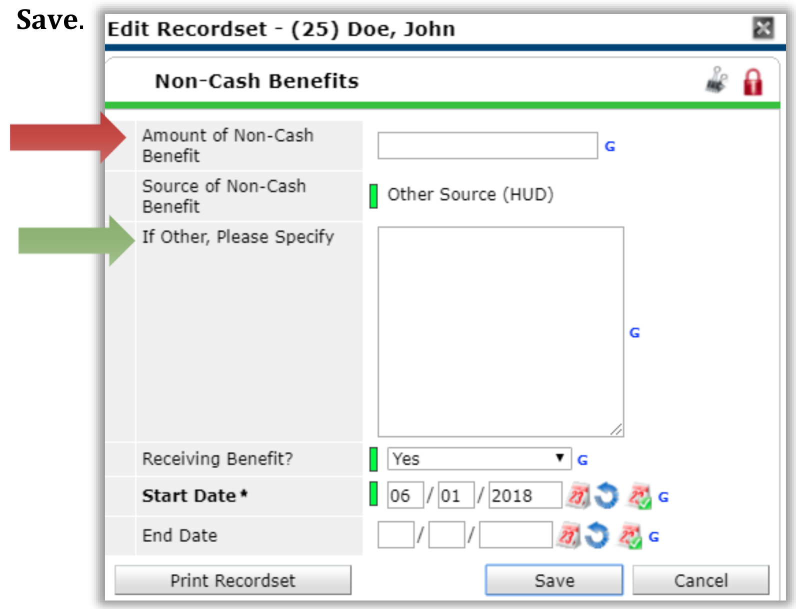
Select the Currently receiving benefit? value for all incomplete Non-cash benefit source records: Yes / No / Data Not Collected / Incomplete

Non-cash benefit source	Currently receiving benefit? Yes	No	Data Not Collected	Incomplete
Special Supplemental Nutrition Program for WIC (HUD)	○	○	○	◉
Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	○	○	○	◉
TANF Child Care Services (HUD)	○	○	○	◉
TANF Transportation Services (HUD)	○	○	○	◉
Other TANF-Funded Services (HUD)	○	○	○	◉
Other Source (HUD)	○	○	○	◉

Save | Save & Exit | Exit

Select **Yes** for each Non-Cash benefit the client is currently receiving. Select **No** for all other benefits. *Enter rental assistance as "Other Source" and specify the type of rental assistance (e.g. Tenant Based Rental Assistance, Section 8, Rapid Rehousing, Shelter Plus Care) in the 'If Other' text box* (green arrow). Click **Save**.

If **Yes,** click on the pencil icon to enter more detail and **Edit Record Set** pop-up will appear. For Start Date, enter date client began receiving benefit; if this is not known, use the client's entry date. Leave End Date blank. Click **Save**.



Please note that the collecting an amount (red arrow) is not required for non-cash benefits.

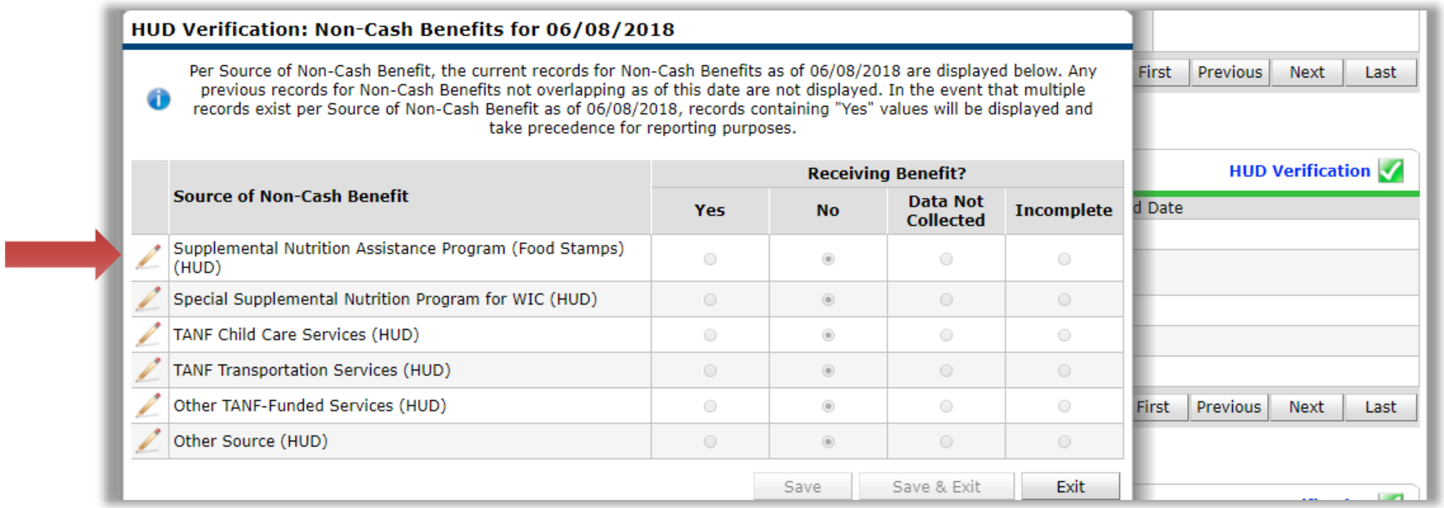
Click **Save** & **Exit.**

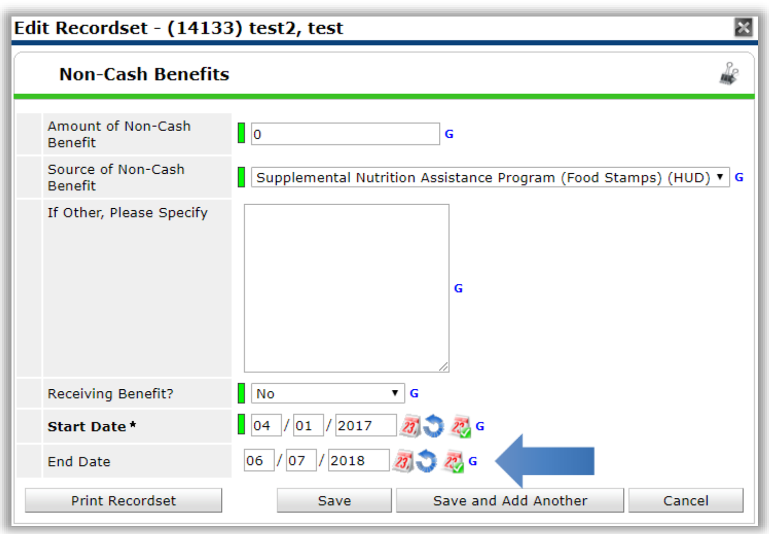
The HUD Verification will change to ✅ indicating that there is no missing data

HUD Verification Process- 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).

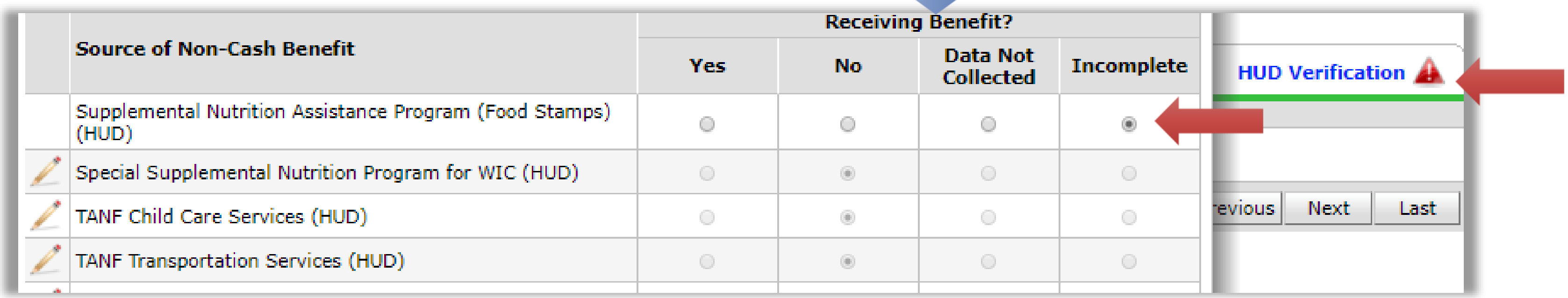




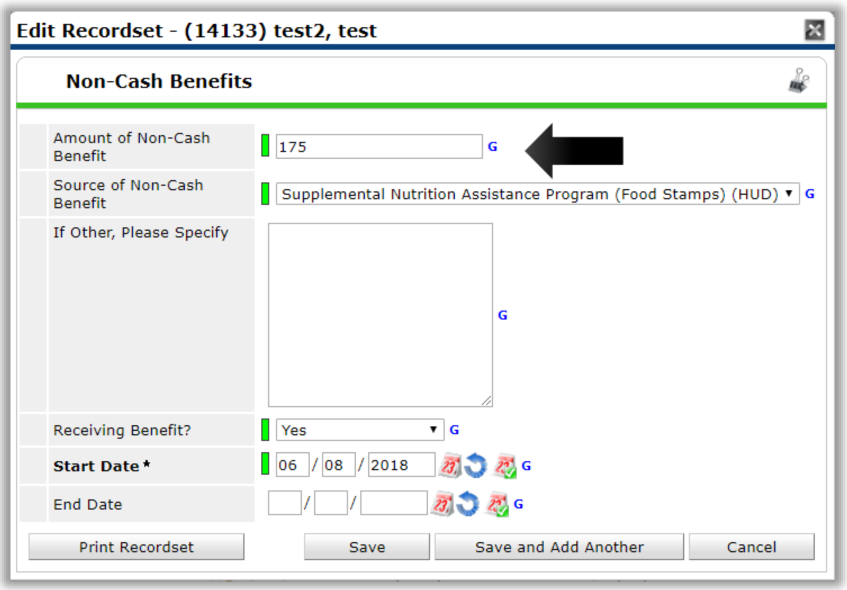
<u>If the date of the change to the client's benefits is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current benefits.</u>

HUD Verification Process- 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) and enter 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**.

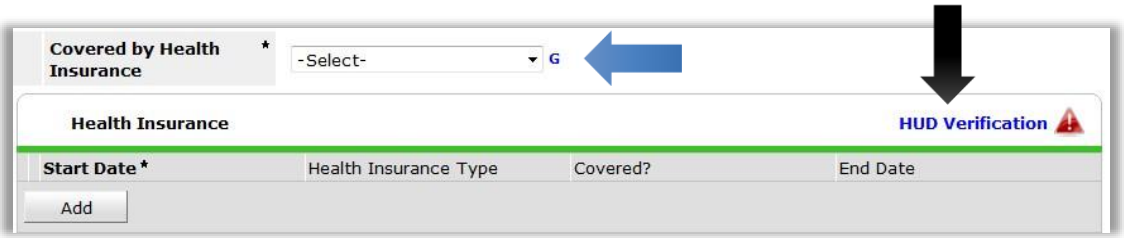


The HUD Verification will change to indicating that there is no missing data.

<u>If the date of the change to the client's benefits 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 benefits.</u>

Standard Intake

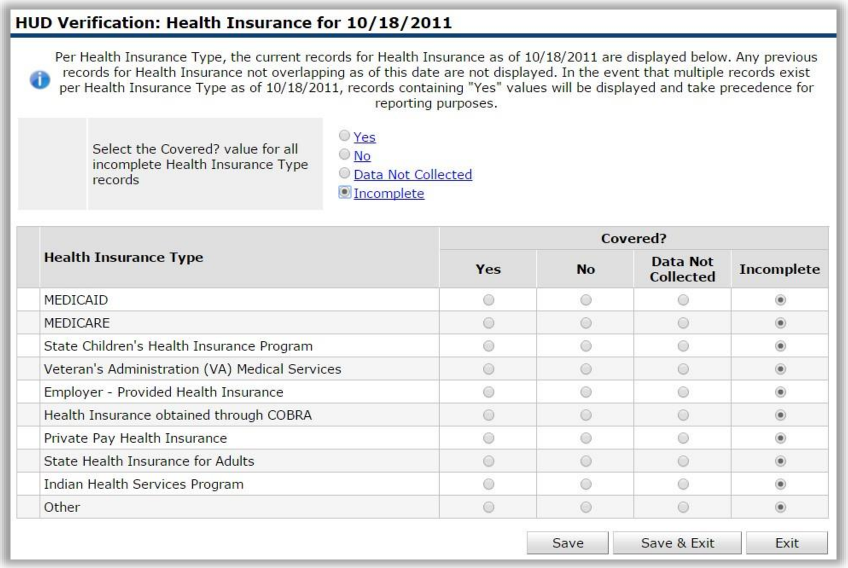
Section 5: Health Insurance



Covered by Health Insurance (blue arrow)

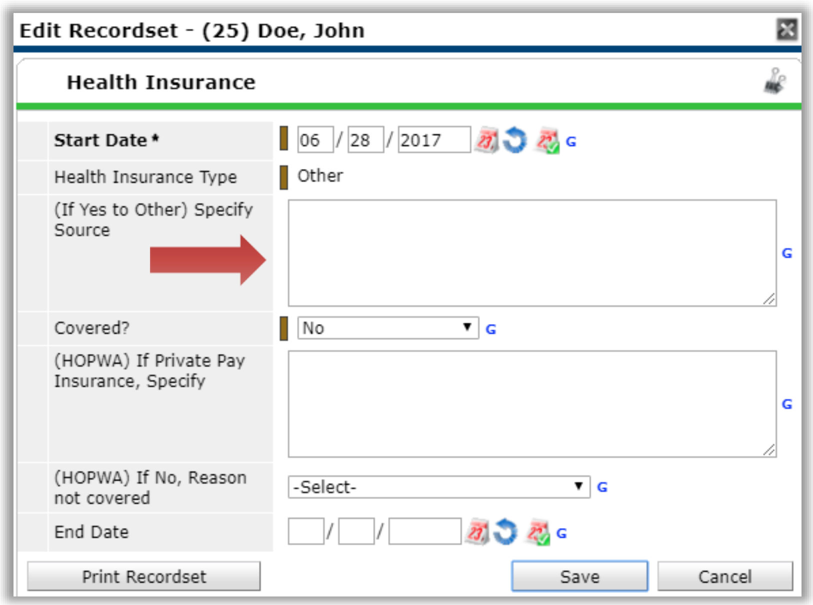
Regardless if client does or does not have doesn't have Health Insurance:

Click **HUD Verification** (black arrow).



Select **Yes** for each Health Insurance Type client is currently receiving, otherwise select **No.**

Once **Yes** or **No** has been selected for each type, click **Save.**



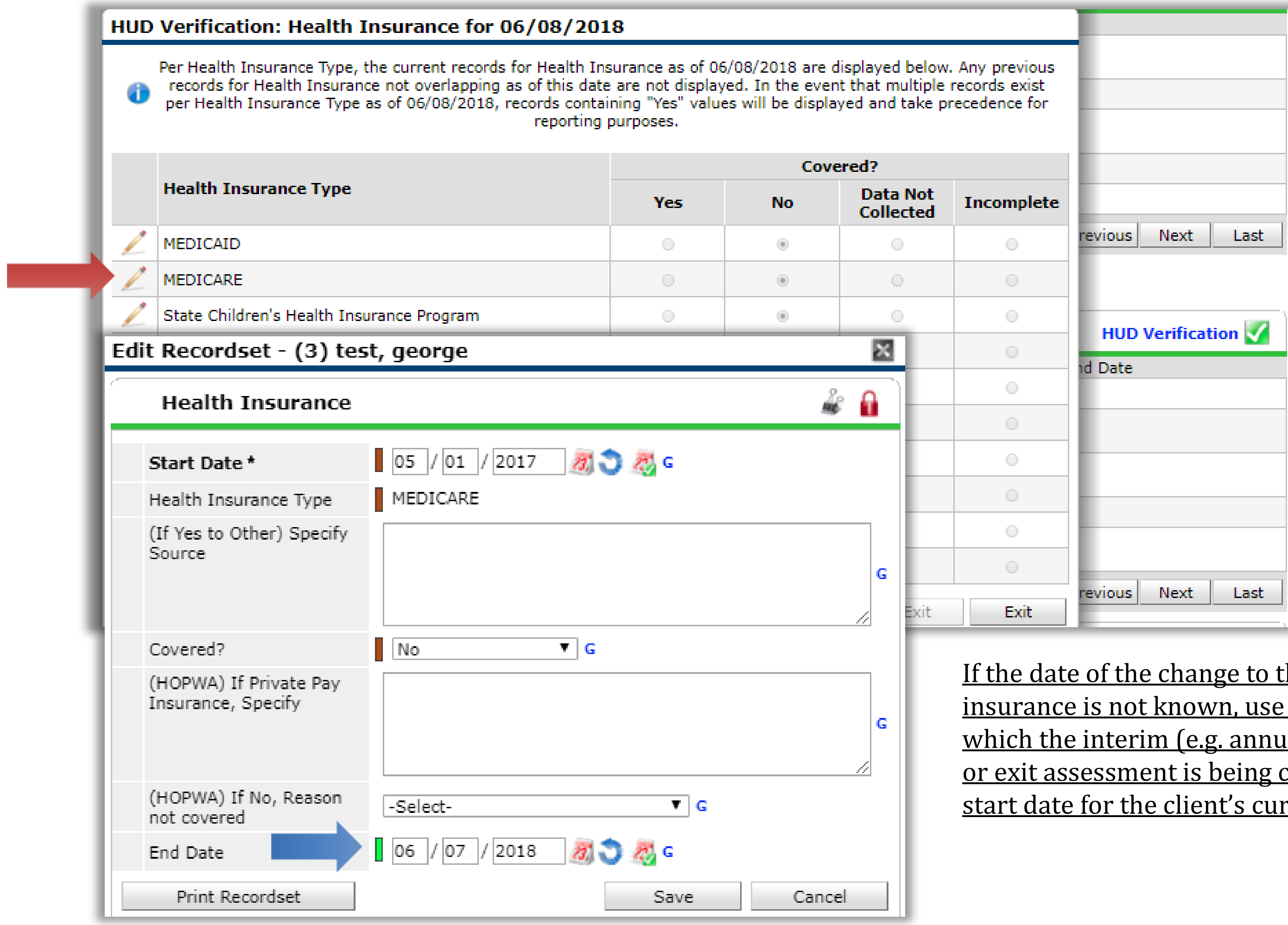
If **Yes,** click on the pencil icon to enter more detail and **Edit Record Set** pop-up will appear. For Start Date, enter date client obtained insurance; if this is not known, use the client's entry date. You can enter to specify the 'If Other' option (red arrow) as well as entering HOPWA information if applicable. HOPWA question are only required for projects funded by HOPWA. Click **Save** & **Exit.**

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

HUD Verification Process-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.

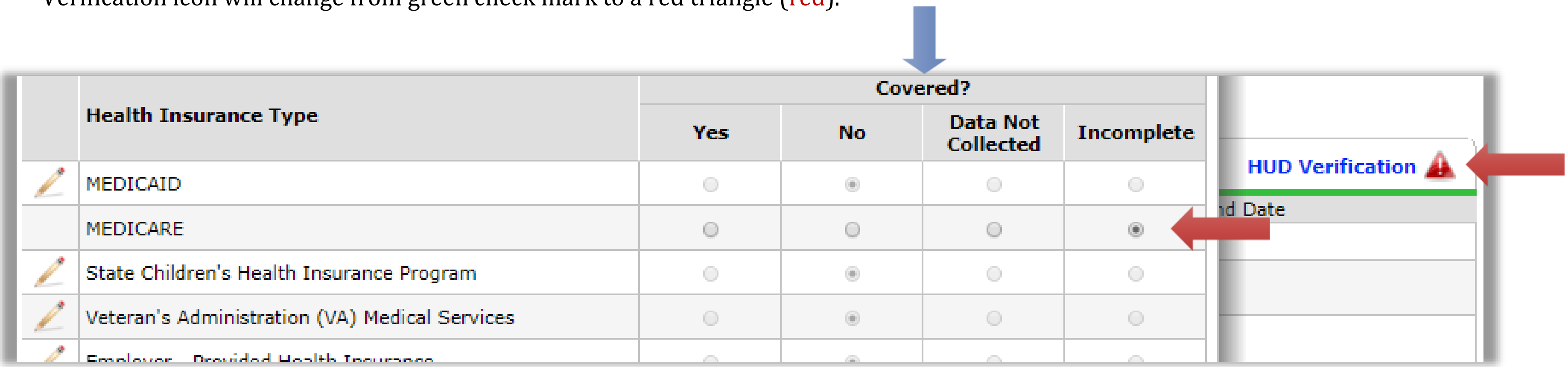
*For example, if the client previously had no health insurance but obtained MEDICARE as of 6/8/18, enter an end date of 6/7/18 for the pertinent recordset (blue arrow). Then click **Save**.*



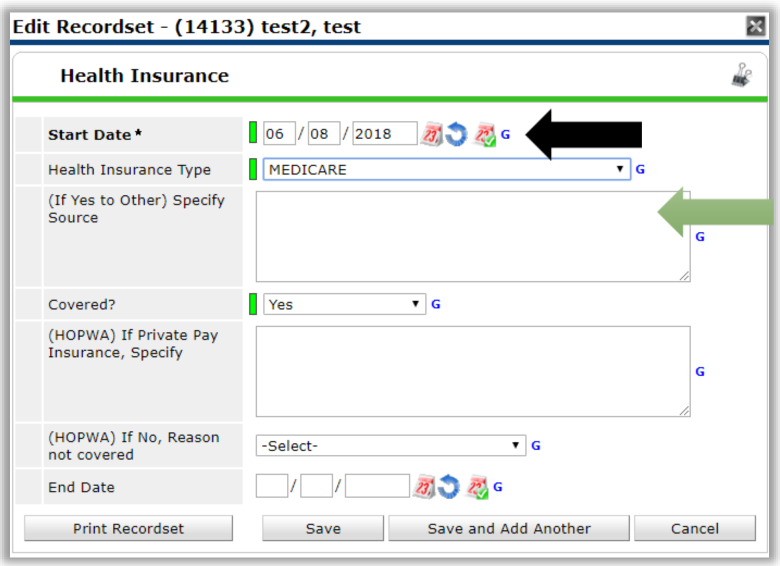
<u>If the date of the change to the client's insurance is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current insurance.</u>

HUD Verification Process-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.**



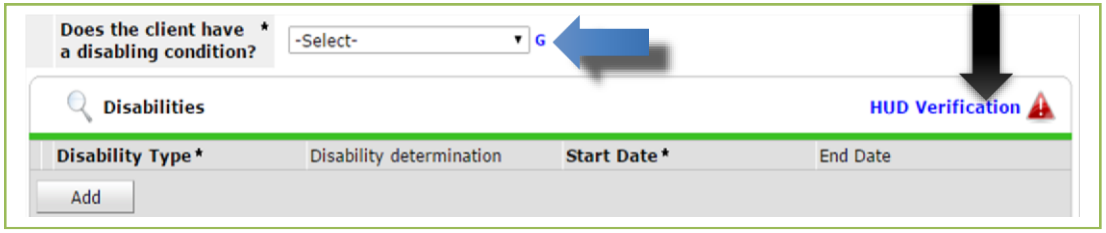
If **Yes,** click on the pencil icon to enter more detail on the Health Insurance Type and **Edit Record Set** pop-up will appear. Here, you can enter to specify source of 'Other' option (green arrow) as well as entering HOPWA related information if applicable.
For the example client, you will enter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

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

<u>If the date of the change to the client's insurance 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 insurance.</u>

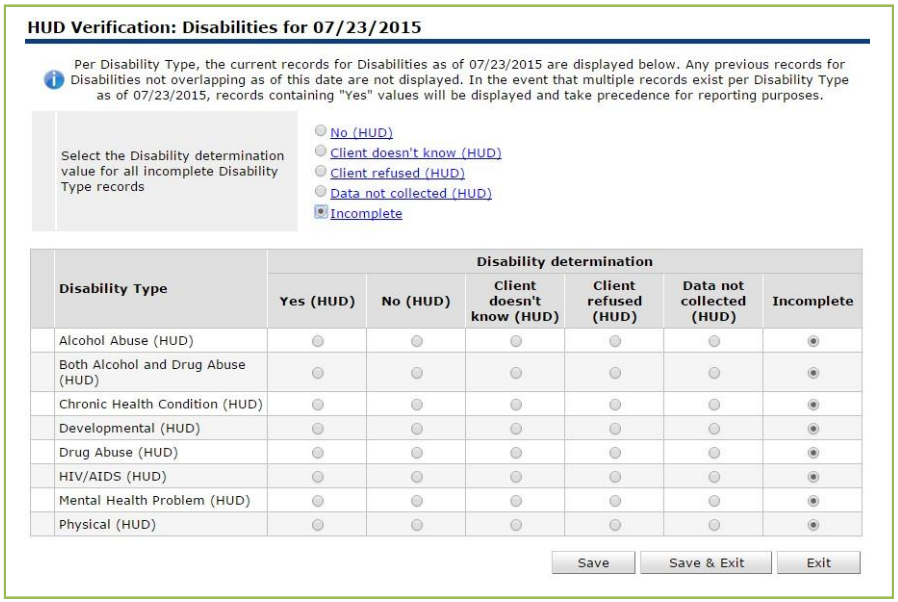
Standard Intake

Section 6: Disability



Does the client have a disabling condition? (blue arrow):

Regardless if client has or does not have Disability Type click **HUD Verification** (black arrow)



HUD Verification: Disabilities for 07/23/2015

Per Disability Type, the current records for Disabilities as of 07/23/2015 are displayed below. Any previous records for Disabilities not overlapping as of this date are not displayed. In the event that multiple records exist per Disability Type as of 07/23/2015, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Disability determination value for all incomplete Disability Type records: No (HUD) / Client doesn't know (HUD) / Client refused (HUD) / Data not collected (HUD) / Incomplete

Disability Type	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete
Alcohol Abuse (HUD)	○	○	○	○	○	◉
Both Alcohol and Drug Abuse (HUD)	○	○	○	○	○	◉
Chronic Health Condition (HUD)	○	○	○	○	○	◉
Developmental (HUD)	○	○	○	○	○	◉
Drug Abuse (HUD)	○	○	○	○	○	◉
HIV/AIDS (HUD)	○	○	○	○	○	◉
Mental Health Problem (HUD)	○	○	○	○	○	◉
Physical (HUD)	○	○	○	○	○	◉

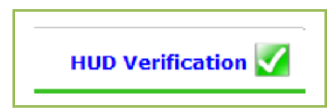
Save | Save & Exit | Exit

Select **Yes**, **No**, **Client Doesn't Know** or **Client Refused** for each disability type client self-reports.

If select **Yes:** a pop-up window appears. Select best match for each question. For Start Date, enter date client's disability began; if this is not known, use the client's entry date. Click **Save**.

Once each Disability Type has been answered: click **Save & Exit**.

HUD Verification changes to



Finished entering Intake data?

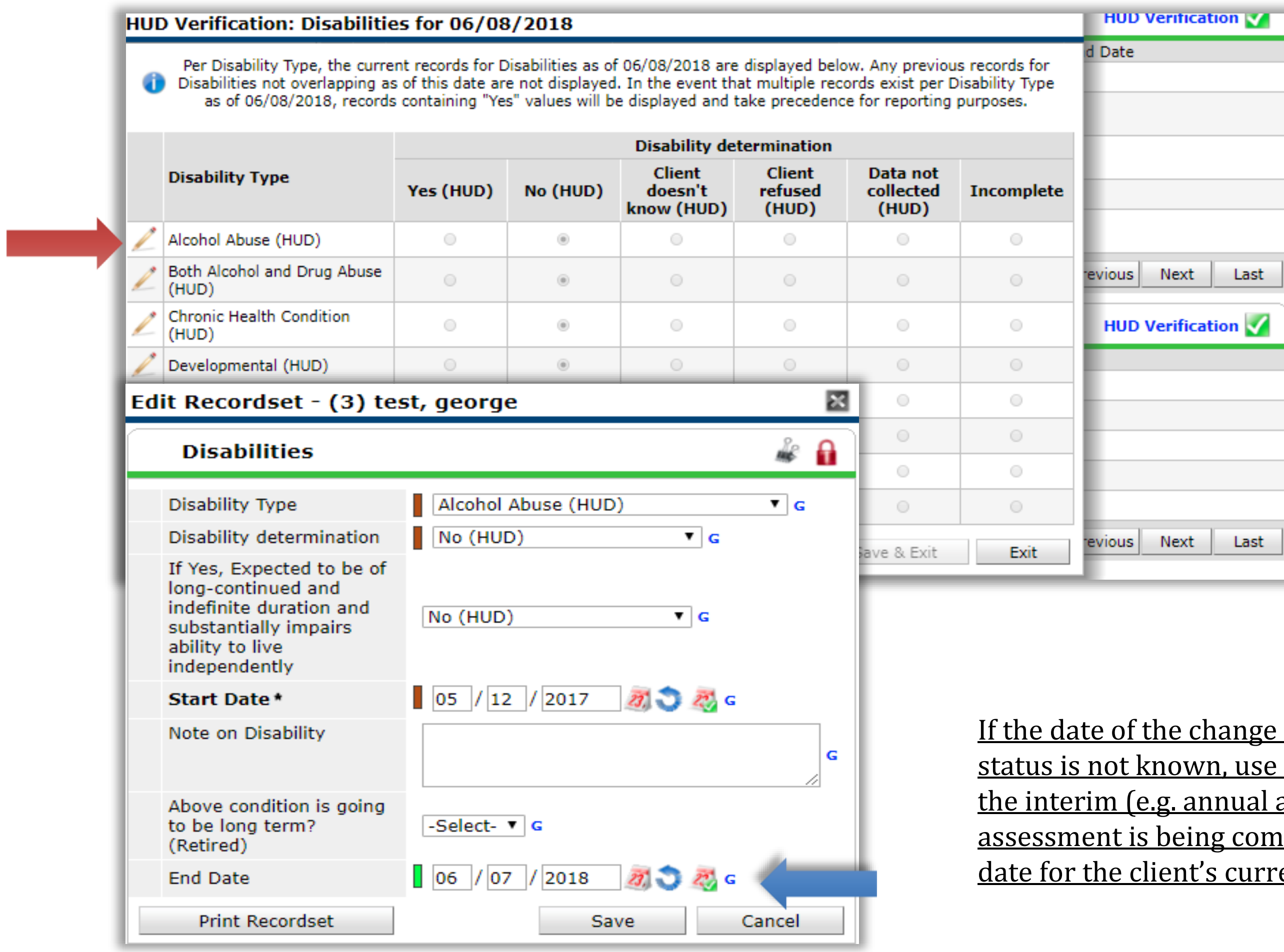
- **Client single?** Click **Save & Exit**.
- **Client in a Household?** Click **Save.**

If a pop-up window appears: it will let you know if there are any data elements missing answers. Provide answers for those data elements, then click **Save**.

HUD Verification Process- 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.

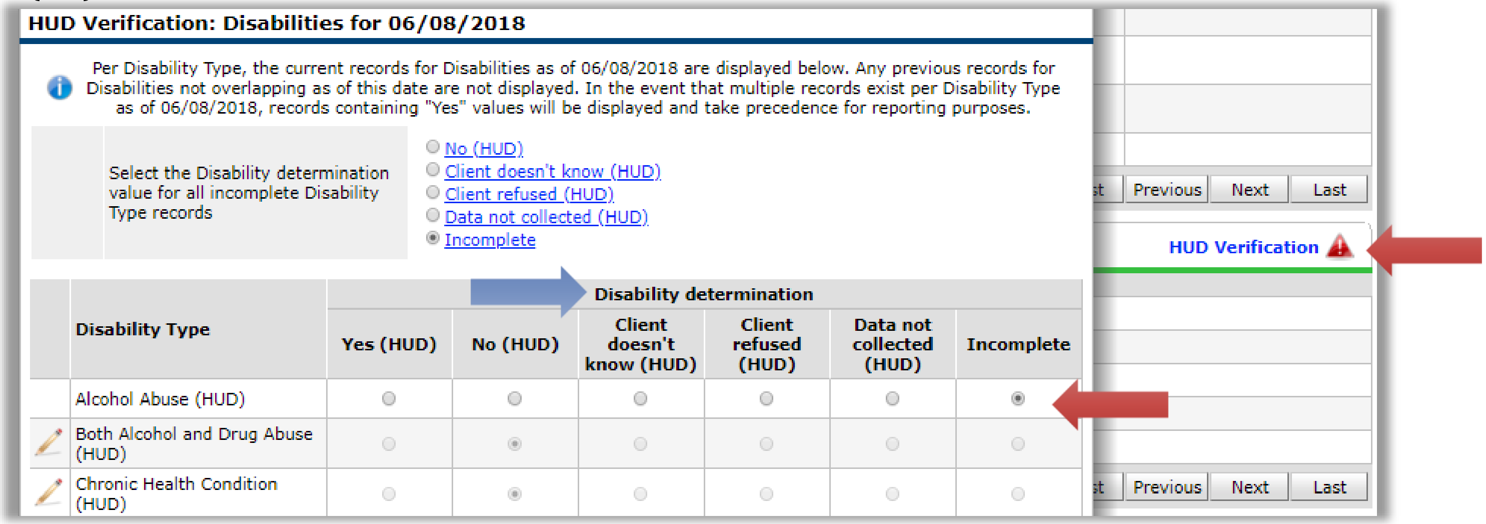
*For example, if the client previously did not have any disabilities and then Alcohol Abuse was indicated 6/8/18, enter an end date of 6/7/2018 for the Alcohol Abuse "No" recordset (blue arrow). Then click **Save.***



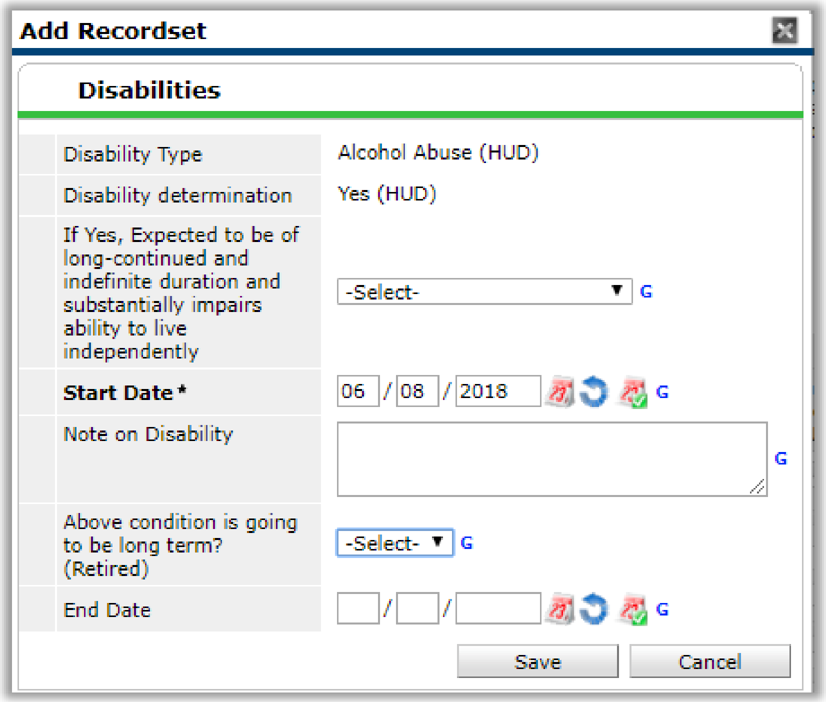
<u>If the date of the change to the disability status is not known, use the date on which the interim (e.g. annual assessment) or exit assessment is being completed as the start date for the client's current disability status.</u>

HUD Verification Process- 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**.

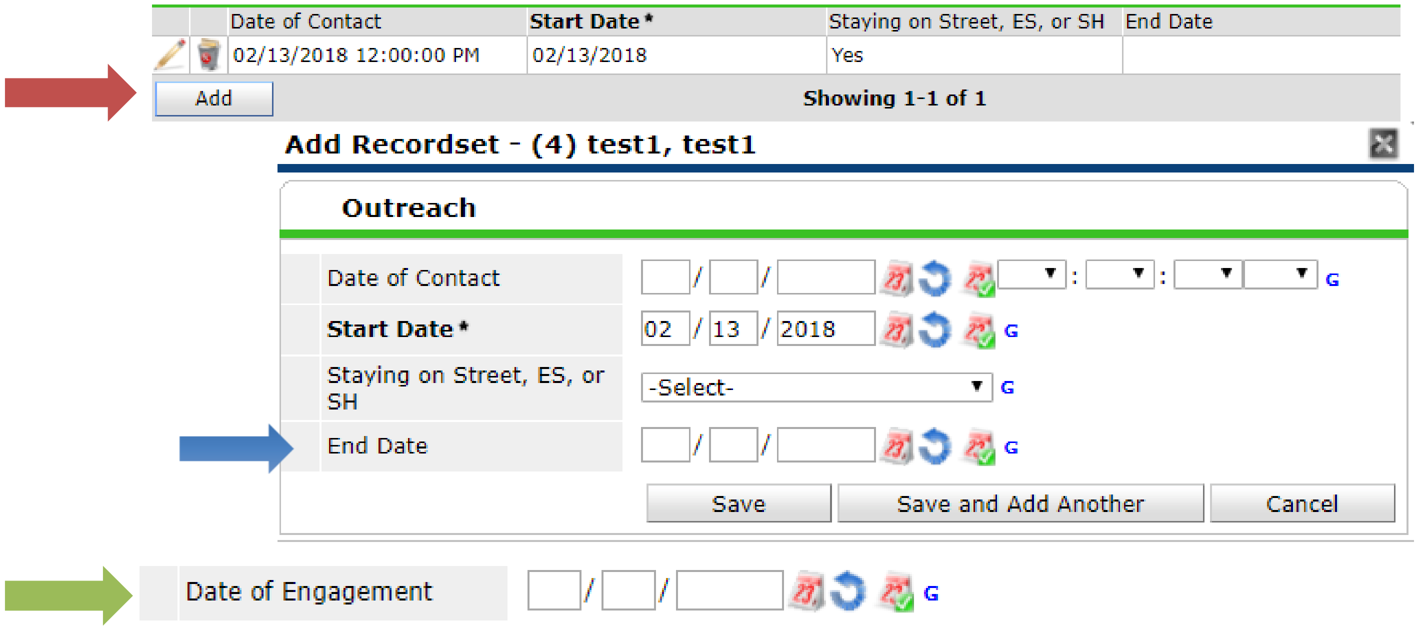
The HUD Verification will change to indicating that there is no missing data.

<u>If the date of the change to the disability status 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 disability status.</u>

Outreach/Date of Engagement

Most street outreach projects are expected to record every contact made with each client in the HMIS. A contact is defined as an interaction between a worker and a client designed to engage the client. ie: activities such as a conversation between the street outreach worker and the client about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service.

For all meaningful contacts with Outreach, click *Add* (red arrow) then enter all information below and leave the *End Date* blank (blue arrow).



Enter *Date of Engagement* (green arrow)
The Date of Engagement should be entered into HMIS at the point when the client has been engaged by the shelter worker. This date may be on or after the project entry date and must be on or prior to project exit.

If a client returns to the project at a later date, the previous date of engagement does not apply to the new project stay. The data must be reentered based on the situation during the new project stay. It is possible that a case may be closed without the client becoming engaged and thus null in that client

Finished entering Intake data?

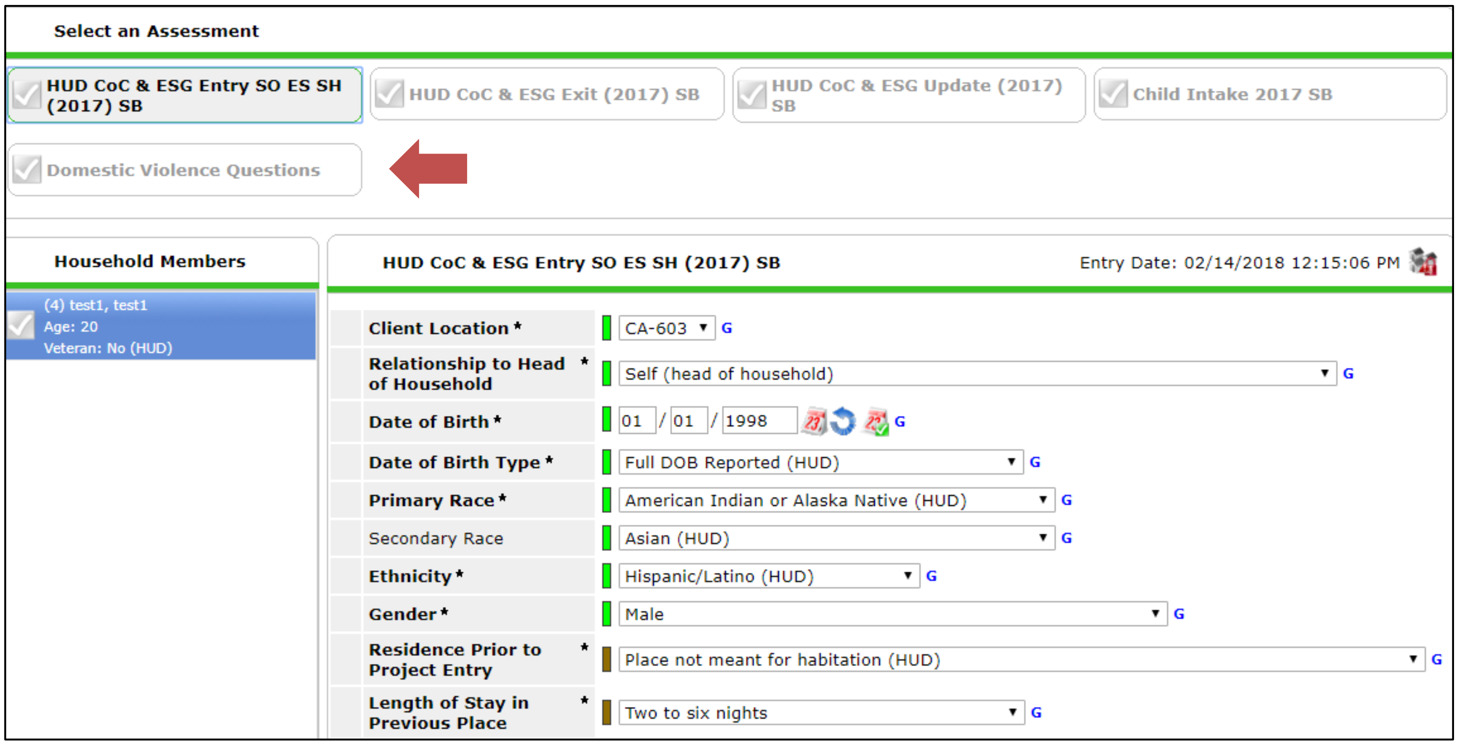
- **Client single?** Click **Save & Exit**.
- **Client in a Household?** Click **Save.**

Domestic Violence Assessment

The Domestic Violence Questions Assessment must be completed for adult clients entering projects receiving the following types of funding: CoC, ESG, HUD VASH, HUD VASH OTH, VA HCHV: CRS EH, VA GPD: All, and HOPWA: All. This assessment must also be completed as part of these clients' interim review (e.g. annual assessment).

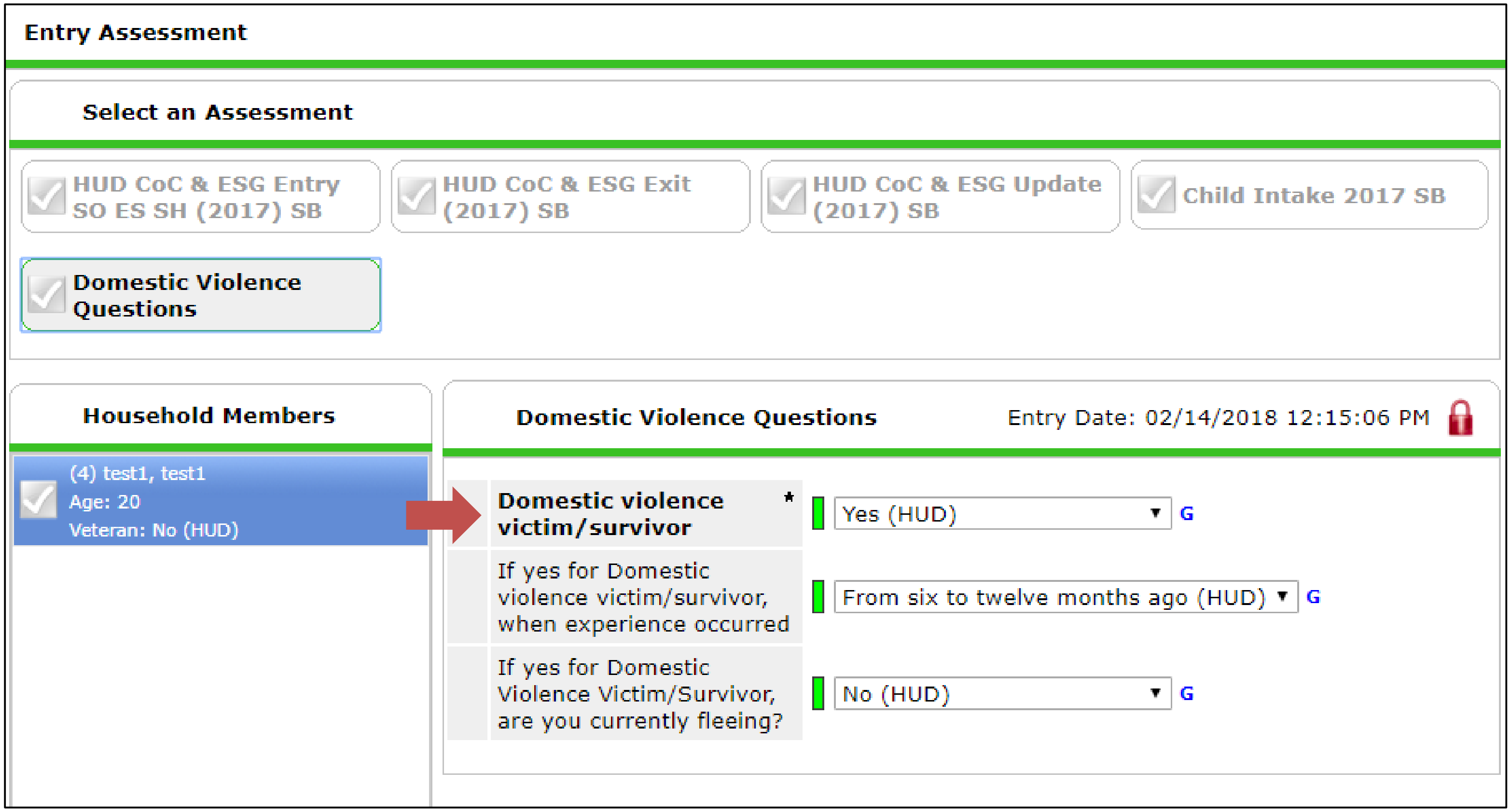
Domestic violence data entered via this assessment will not be shared in HMIS or discussed during Coordinated Entry System case conferencing.

To begin, click Save after completing the standard intake assessment (see preceding pages). Then scroll up to the top of the intake assessment window and click on the Domestic Violence Questions assessment. (red arrow)



Domestic Violence Questions

If the answer to the first question (red arrow) is *Yes,* answer the following two questions. If the answer to the first question is *No*, do not answer the following two questions.

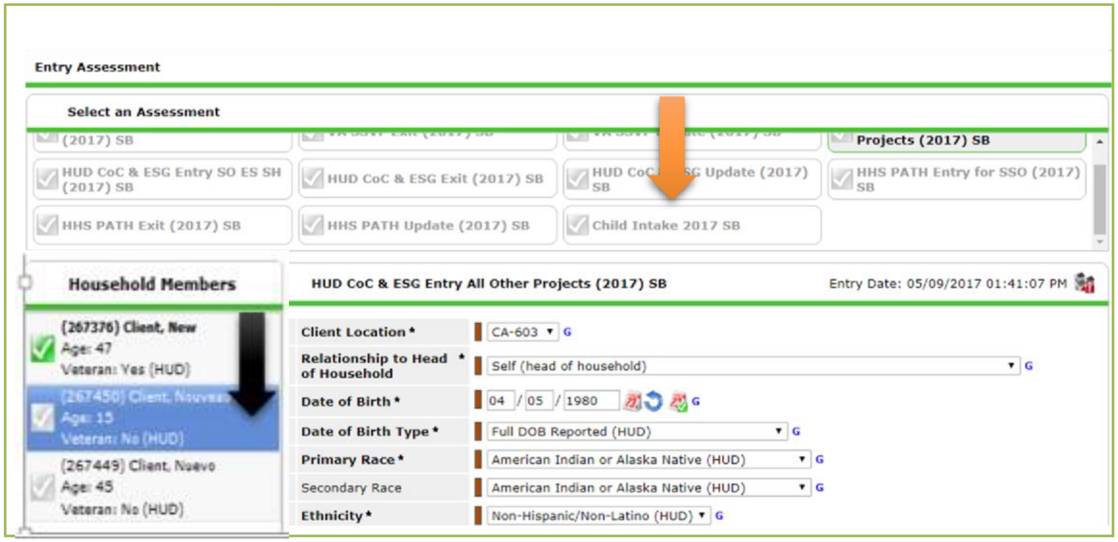


Finished with the Intake process? Click **Save & Exit.**

To complete project intake for other household members, click **Save** and follow directions below.

Standard Intake

Completing Project Entry for Household members



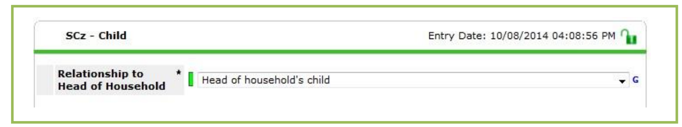
Note: Nouveau Client is a child

Click **Child Intake 2017 SB** (orange arrow)

Then switch to Nouveau Client (black arrow)

Click **Save**.

Child Intake is much shorter than the Adult Intake.



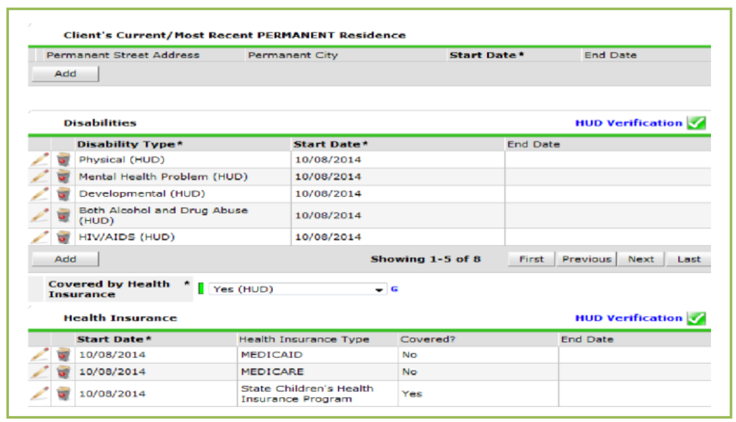
Enter data in:

- **Relationship** select best match. In this example: **Head of Household's child**

Then scroll down and complete:

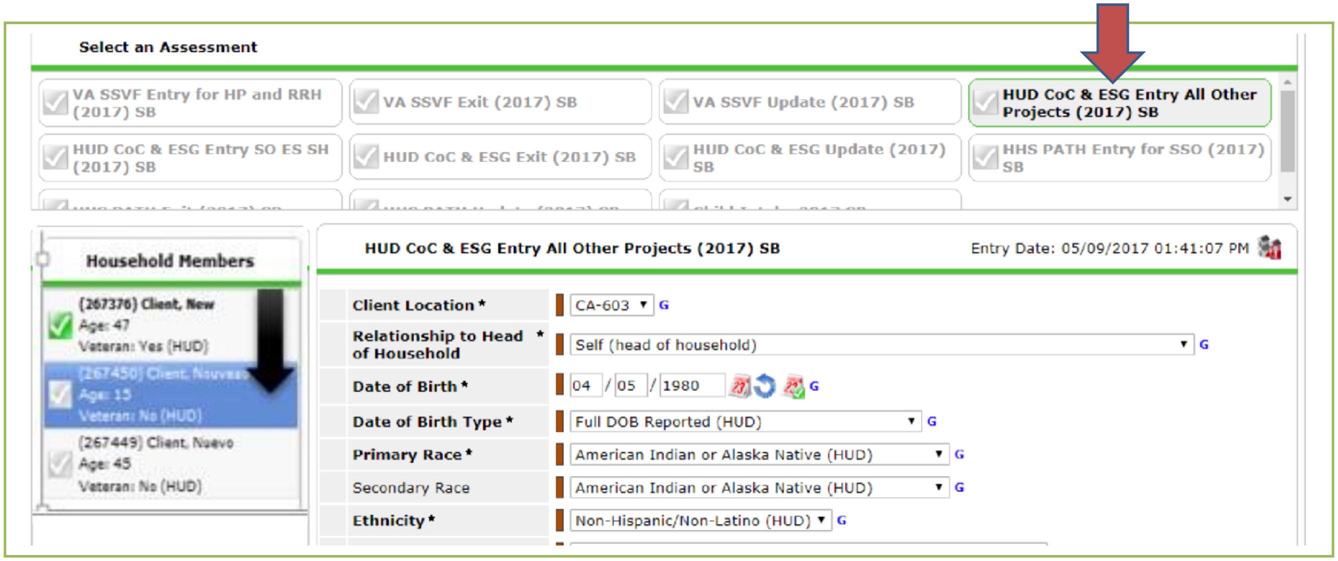
- **Client's Current/Most Recent Address**
- **Disabilities**
- **Health Insurance**

Click **Save**



Standard Intake

Completing Project Entry for Household members



<u>Note: Nuevo Client is an adult.</u>

Click **HUD CoC & ESG Entry All other Projects or HUD CoC & ESG Entry SO ES SH (2017) SB** (red arrow) depending on your program…

Complete the Intake (how to complete the Intake for an adult starts on page 14).

Follow the above steps (for either an Adult or for a Child) until Intakes have been completed for all household members.

VI- SPDAT

Vulnerability Index-Service Prioritization Decision Assistance Tool

At the Bottom of the Client Summary Page there is a VI-SPDAT)

Only use **VI-SPDAT v2.0**, Click **Add** (green arrow)

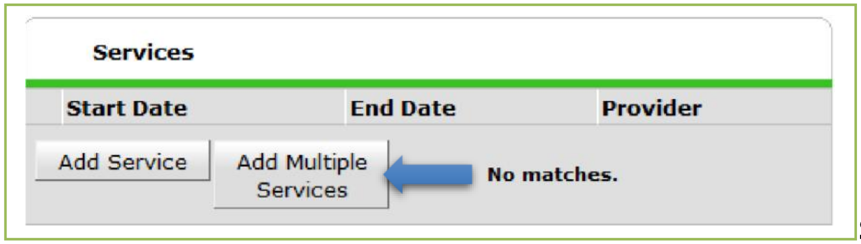
Or the **VI-FSPDAT v2.0**, Click Add (blue arrow)

VI-SPDATs questions will pop up, answer questions and click save and exit at the bottom.

Services

Click **Multiple Services** (blue arrow) to add one or more service transactions. Service transaction(s) can be added to a single client or to the household.

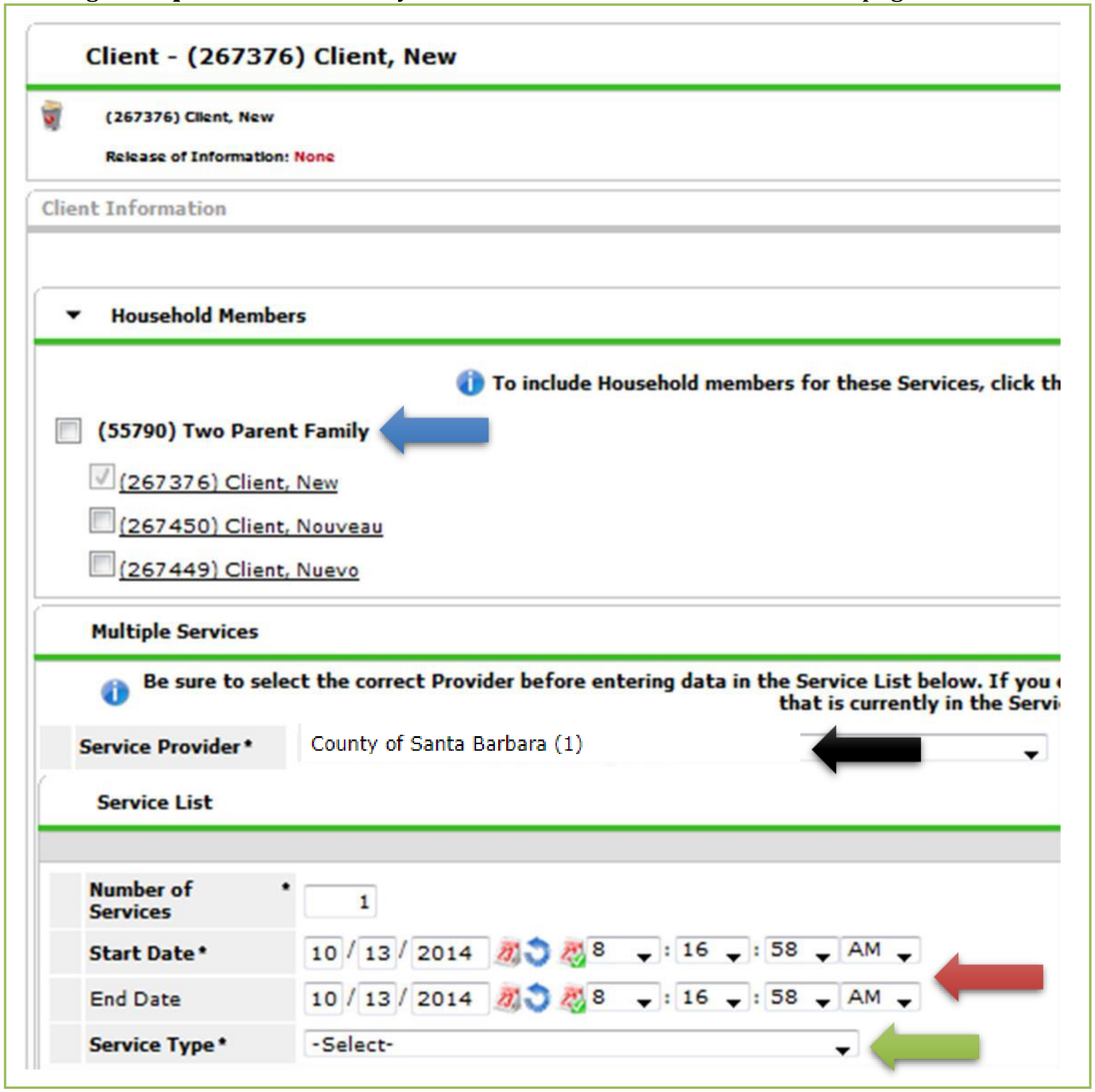
<u>Adding only one (1) service transaction?</u> Click **Add Service**. This allows you to enter more information about the service transaction.



See next page on how to enter a service transaction.

Service Transactions

Clicking **Multiple Services** takes you to the client's Service Transactions page.



Screenshot is the top portion of Service Transactions.

Client in a household?
Want to assign the service transaction to the household?
Click box for family (blue arrow)

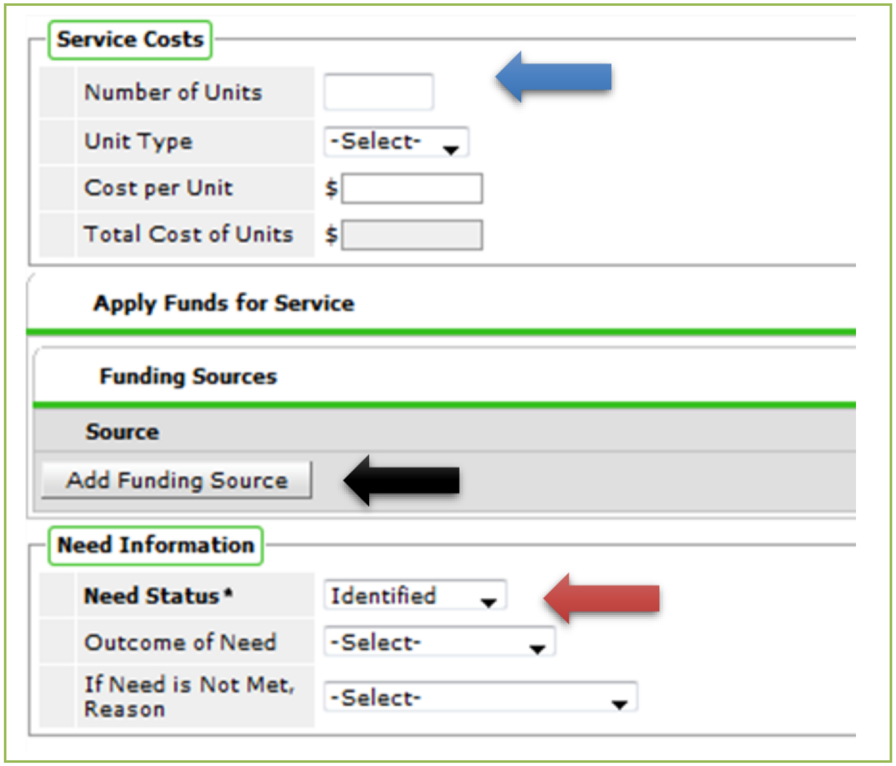
Service Provider: default to the provider you are in (black arrow). Change to another provider if necessary.

Start Date/End Date: defaults to today's date (red arrow). Change if necessary.

Service Type: select best match (green arrow)

Service Transactions

Clicking **Multiple Services** takes you to the client's Service Transactions page.



Screenshot is the bottom portion of Service Transactions.

Service Costs (red arrow)

Skip this section. No Santa Cruz Agency/Provider collecting Service Costs (i.e. the amount of time spend providing a service)

Funding Source: click **Add Funding Source** (black arrow) if your Agency/Provider tracks the funding source paying for the service.

Needs Information (red arrow)

Able to meet Need (that is, service was provided)?

Need Status: select **Closed**

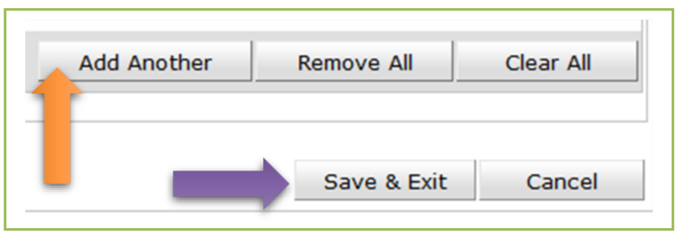
Outcome of Need: select **Fully Met**

Not able to meet Need?

Need Status: Closed

Outcome of Need: Not Met

If Need is Not Met, Reason: select best match



Screenshot of bottom of page.

Click **Add Another** (orange arrow) to add another service transaction. Click **Save & Exit** (purple arrow) when finished adding service transaction(s).

Congratulations! Entry of Intake and Service Transaction data complete.

Additional Assistance

For any additional technical assistance

Email us: helpdesk@ctagroup.org

OR

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