

Santa Barbara County Continuum of Care

July 2018

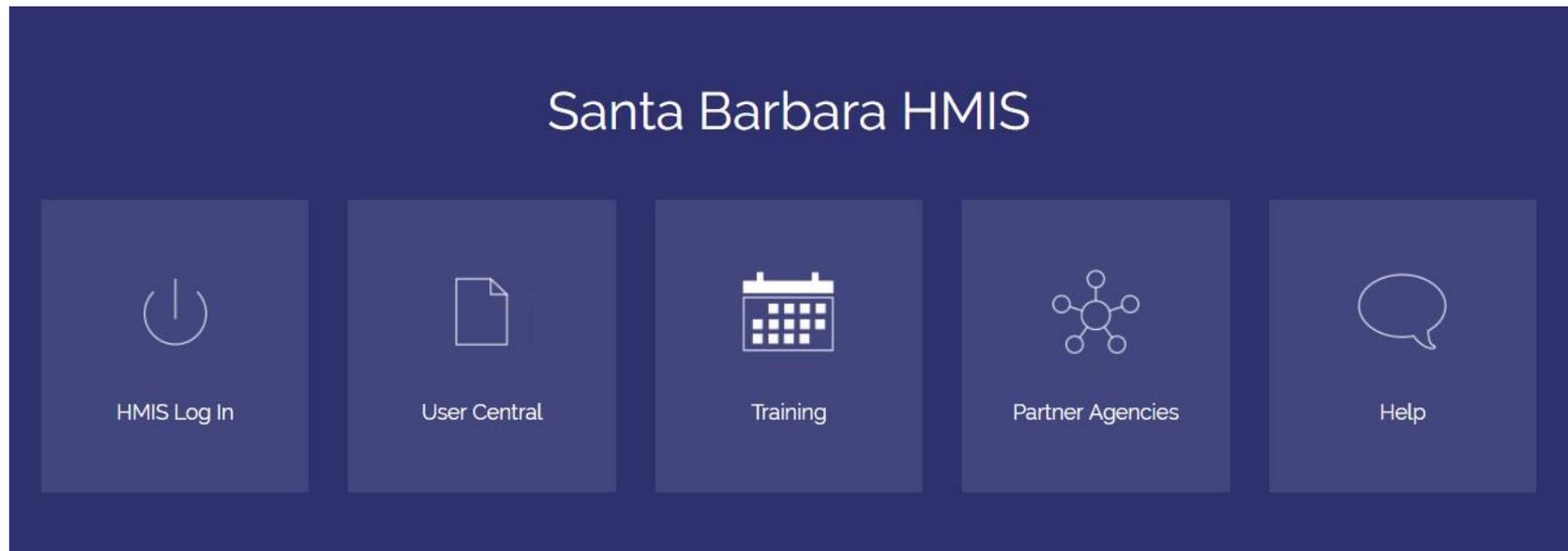
HMIS 5.12 workflow Adding an Interim Review



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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/ Annual Assessment

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

Client - (7) Lee, Baby

(7) Lee, Baby
Release of Information: None

-Switch to Another Household Member- Submit

Client Information Service Transactions

Summary Client Profile Households ROI **Entry / Exit** Case Managers Case Plans Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
County of Santa Barbara (1)	HUD	01/12/2018				
The Salvation Army: Haven-VC (RRH) (98)	HUD	05/08/2017	01/12/2018			

Add Entry / Exit Showing 1-2 of 2 Exit

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).

Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
No matches.		

Add Interim Review

Adding an Interim Review/ Annual Assessment

Under *Interim Review Data*, select the *Interim Review Type*: 30-day, 60-day, 90-day, 120-day, Annual Assessment, or Update.

Annual Assessment must be created for each client who are enrolled in a project one year or more, even if there is no change in the client's status. 'Project Status Date' must be no more than 30 days before or after the anniversary of the head of household's Program Start Date. If the household members have different start dates, the annual assessment are based solely on the head of household's anniversary date. All members in the enrollment must be updated at the same time. You must do this annually if the client is still enrolled.

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'.

The screenshot shows a web form titled "Add Interim Review - (7) Lee, Baby". It is divided into two main sections: "Household Members" and "Interim Review Data".

Household Members: This section contains an information icon and a note: "To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name." Below this, there are two entries: "(6) Lee, George (Entry Date: 01/12/2018 10:48 AM)" and "(7) Lee, Baby (Entry Date: 01/12/2018 10:48 AM)". A blue arrow points to the checkbox next to the name "(7) Lee, Baby".

Interim Review Data: This section contains several fields:

- Entry / Exit Provider: County of Santa Barbara (1)
- Entry / Exit Type: HUD
- Interim Review Type *: A dropdown menu is open, showing options: "-Select-", "30-Day Review", "60-Day Review", "90-Day Review", "120-Day Review", "Annual Assessment", and "Update". A red arrow points to this dropdown menu.
- Review Date *: A date and time selector showing "12 : 12 : 14 PM".

At the bottom right of the form, there are two buttons: "Save & Continue" and "Cancel".

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

Interim Review – Select an Assessment..... Page:5

Interim Review – Monthly Income..... Page: 6

Interim Review – Non-Cash Benefits.....Page: 8

Interim Review – Health Insurance.....Page: 10

Interim Review – Disabilities.....Page: 12

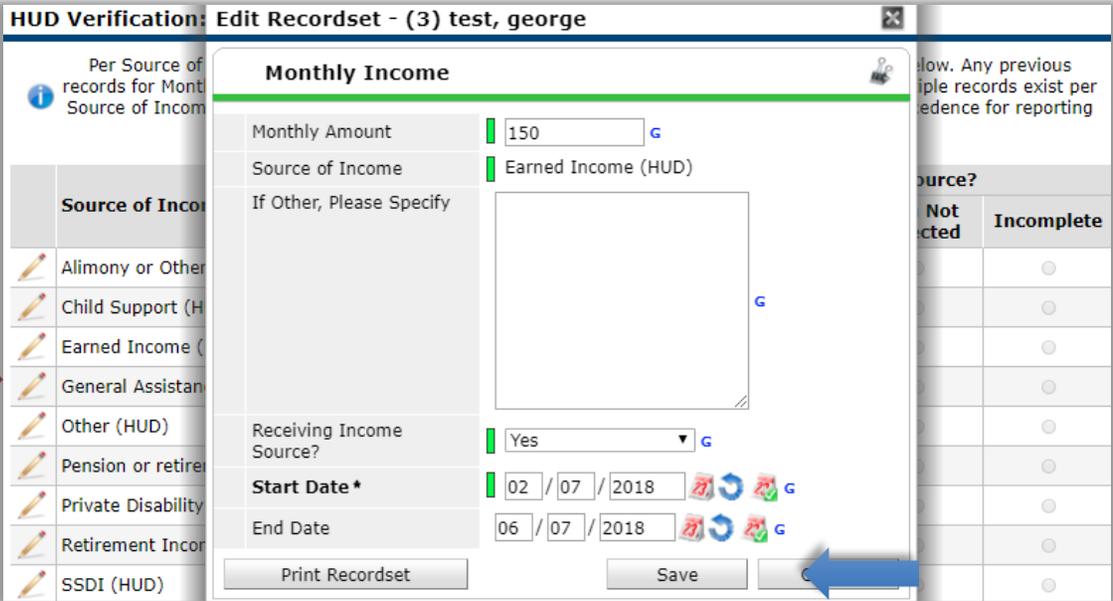
Adding an Interim Review-Monthly Income

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.



HUD Verification: Edit Recordset - (3) test, george

Per Source of records for Month Source of Income

Monthly Income

Monthly Amount: 150 G

Source of Income: Earned Income (HUD)

If Other, Please Specify:

Receiving Income Source?: Yes G

Start Date *: 02 / 07 / 2018 G

End Date: 06 / 07 / 2018 G

Print Recordset Save

Source?	Not Selected	Incomplete
		<input type="radio"/>

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).

HUD Verification: Monthly Income for 06/08/2018

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

Select the Receiving Income Source? value for all incomplete Source of Income records

No
 Data Not Collected
 Incomplete

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

HUD Verification 

End Date

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**.

Add Recordset

Monthly Income

Monthly Amount: 200 

Source of Income: Earned Income (HUD)

If Other, Please Specify: 

Receiving Income Source?: Yes

Start Date*: 06 / 08 / 2018   

End Date: / /   

Save Cancel

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.

Source of Non-Cash Benefit	Receiving Benefit?			
	Yes	No	Data Not Collected	Incomplete
 Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Special Supplemental Nutrition Program for WIC (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 TANF Child Care Services (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 TANF Transportation Services (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Other TANF-Funded Services (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Other Source (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save Save & Exit Exit



Edit Recordset - (14133) test2, test

Non-Cash Benefits

Amount of Non-Cash Benefit: 0

Source of Non-Cash Benefit: Supplemental Nutrition Assistance Program (Food Stamps) (HUD)

If Other, Please Specify:

Receiving Benefit?: No

Start Date *: 04 / 01 / 2017

End Date: 06 / 07 / 2018

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).

Source of Non-Cash Benefit	Receiving Benefit?				HUD Verification 
	Yes	No	Data Not Collected	Incomplete	
Supplemental Nutrition Assistance Program (Food Stamps) (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
 Special Supplemental Nutrition Program for WIC (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
 TANF Child Care Services (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
 TANF Transportation Services (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

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**.

Edit Recordset - (14133) test2, test

Non-Cash Benefits

Amount of Non-Cash Benefit: 

Source of Non-Cash Benefit:

If Other, Please Specify:

Receiving Benefit?:

Start Date *:

End Date:

Print Recordset Save Save and Add Another Cancel

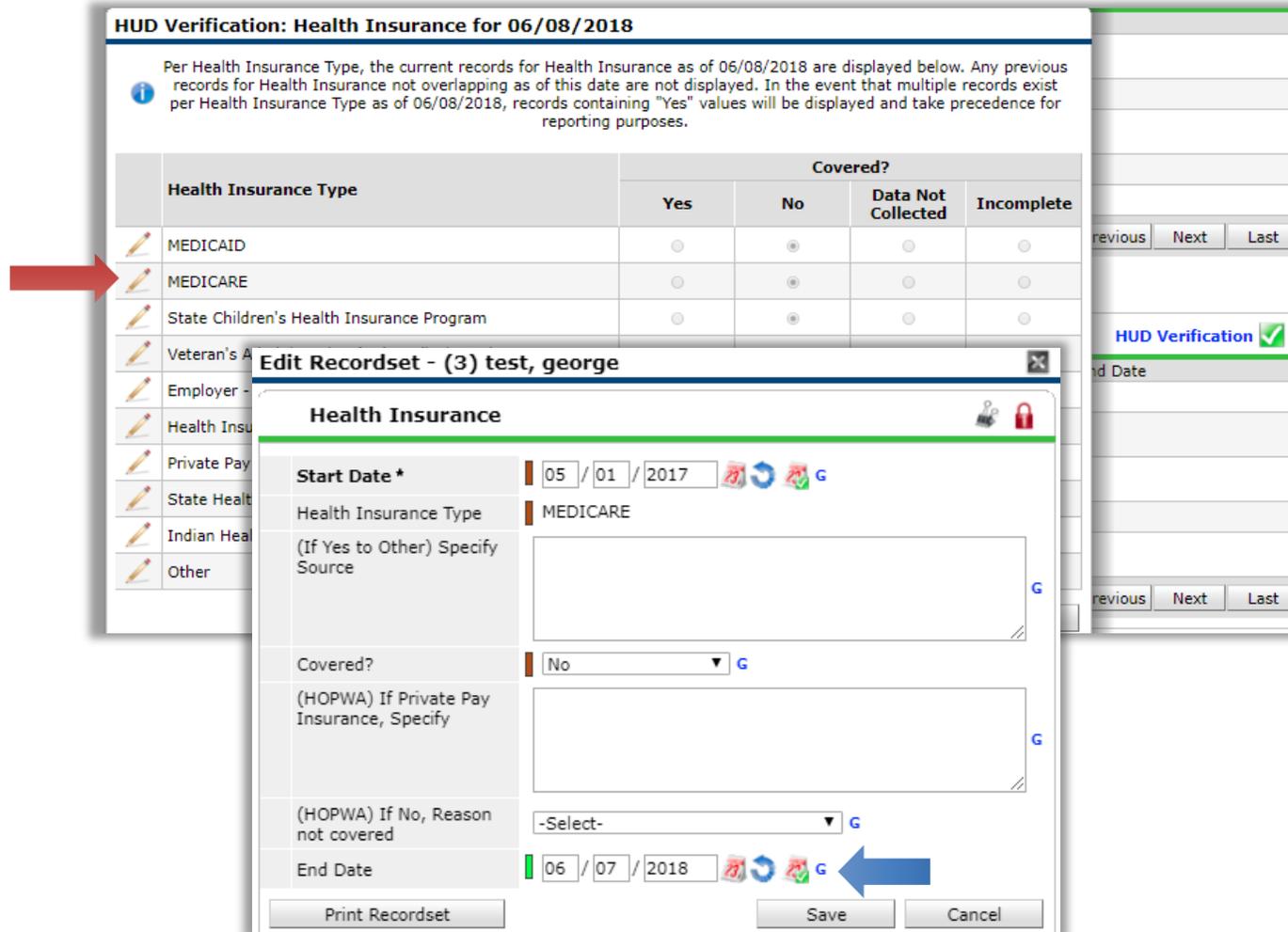
The HUD Verification will change to  indicating that there is no missing data.

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**.



HUD Verification: Health Insurance for 06/08/2018

Per Health Insurance Type, the current records for Health Insurance as of 06/08/2018 are displayed below. Any previous records for Health Insurance not overlapping as of this date are not displayed. In the event that multiple records exist per Health Insurance Type as of 06/08/2018, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Health Insurance Type	Covered?			
	Yes	No	Data Not Collected	Incomplete
 MEDICAID	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 MEDICARE	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 State Children's Health Insurance Program	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Veteran's A	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Employer -	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Health Insu	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Private Pay	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 State Healt	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Indian Hea	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Other	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Edit Recordset - (3) test, george

Health Insurance

Start Date * | 05 / 01 / 2017

Health Insurance Type | MEDICARE

(If Yes to Other) Specify Source

Covered? | No

(HOPWA) If Private Pay Insurance, Specify

(HOPWA) If No, Reason not covered | -Select-

End Date | 06 / 07 / 2018

Buttons: Print Recordset, Save, Cancel

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).

Health Insurance Type	Covered?			
	Yes	No	Data Not Collected	Incomplete
MEDICAID	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
MEDICARE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
State Children's Health Insurance Program	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Veteran's Administration (VA) Medical Services	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employer Provided Health Insurance	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

Edit Recordset - (14133) test2, test

Health Insurance

Start Date * 06 / 08 / 2018

Health Insurance Type MEDICARE

(If Yes to Other) Specify Source

Covered? Yes

(HOPWA) If Private Pay Insurance, Specify

(HOPWA) If No, Reason not covered -Select-

End Date

Print Recordset Save Save and Add Another Cancel

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.

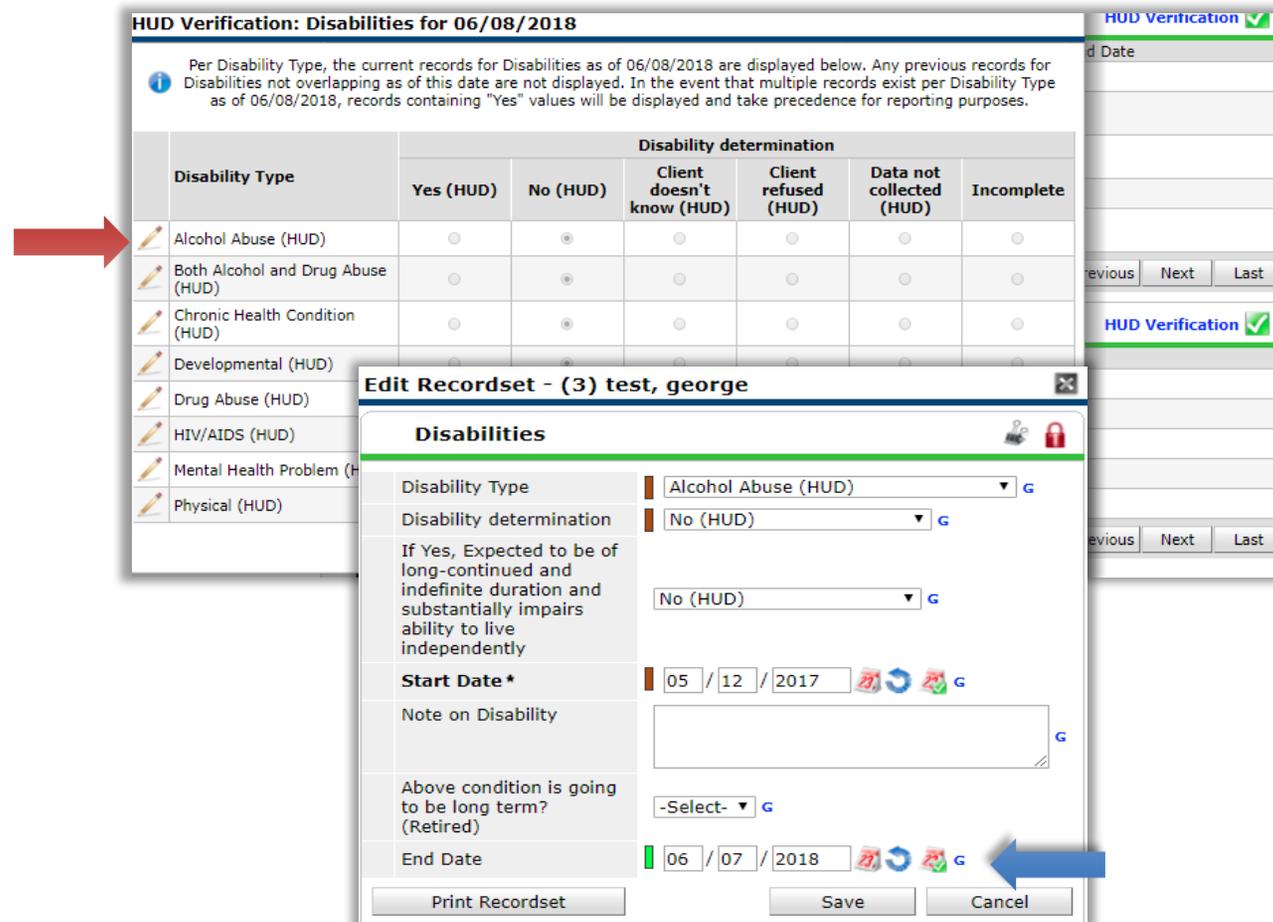
For the example client, you will enter the client's new MEDICARE information then (black arrow). Then click **Save & Exit**.

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**.



HUD Verification: Disabilities for 06/08/2018

Per Disability Type, the current records for Disabilities as of 06/08/2018 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 06/08/2018, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Disability Type	Disability determination					
	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete
 Alcohol Abuse (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Both Alcohol and Drug Abuse (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Chronic Health Condition (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Developmental (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Drug Abuse (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 HIV/AIDS (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Mental Health Problem (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
 Physical (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Edit Recordset - (3) test, george

Disabilities

Disability Type: Alcohol Abuse (HUD) G

Disability determination: No (HUD) G

If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently: No (HUD) G

Start Date*: 05 / 12 / 2017 G

Note on Disability: G

Above condition is going to be long term? (Retired): -Select- G

End Date: 06 / 07 / 2018 G

Buttons: Print Recordset, Save, Cancel

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).

HUD Verification: Disabilities for 06/08/2018

Per Disability Type, the current records for Disabilities as of 06/08/2018 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 06/08/2018, 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	Disability determination					
	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete
Alcohol Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Both Alcohol and Drug Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chronic Health Condition (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

HUD Verification 

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

Disabilities

Disability Type: Alcohol Abuse (HUD)

Disability determination: Yes (HUD)

If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently:

Start Date: 06 / 08 / 2018

Note on Disability:

Above condition is going to be long term? (Retired):

End Date: / /

Save Cancel

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.

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.

Entry / Exit Interim Review

Interim Review Data	
Entry / Exit Provider	Artisan Court II (PH) (75)
Entry / Exit Type	HUD
Interim Review Type	Annual Assessment
Review Date	06/15/2018 10:36:57 AM

Interim Review Assessment

Select an Assessment

RRH (2016) SB

HUD CoC & ESG Entry SO ES SH (2016) SB

HUD CoC & ESG Exit (2016) SB

HUD CoC & ESG Update (2016) SB

Other Projects (2016) SB

HHS PATH Entry for SSO (2016) SB

HHS PATH Exit (2016) SB

HHS PATH Update (2016) SB

Child Intake 2016 SB

Household Members

- (3) test, george
Age: 22
Veteran: Unknown
- (43) Smith, Baby
Age: 1
Veteran: No (HUD)
- (46) Testing, Testing
Age: 10
Veteran: No (HUD)

Child Intake 2016 SB Interim Review Date: 06/15/2018 10:36:57 AM

Relationship to Head of Household * | Self (head of household) G

Date of Birth * | 07 / 01 / 1995 G

Date of Birth Type * | Full DOB Reported (HUD) G

Gender * | Male G

Ethnicity * | Non-Hispanic/Non-Latino (HUD) G

Primary Race * | American Indian or Alaska Native (HUD) G

Secondary Race | -Select- G

Does the client have a disabling condition? * | No (HUD) G

Disabilities HUD Verification

Disability Type
<input type="checkbox"/> Alcohol Abuse (HUD)
<input type="checkbox"/> Physical (HUD)
<input type="checkbox"/> Mental Health Problem (HUD)
<input type="checkbox"/> HIV/AIDS (HUD)

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.

The screenshot displays two overlapping windows from a software application. The top window, titled "Interim Reviews", contains a table with the following data:

Interim Reviews Associated with this Entry / Exit			
	Review Date	Review Type	Client Count
	06/15/2018	Annual Assessment	

Below the table is an "Add Interim Review" button and the text "Showing 1-1 of 1". A red arrow points to the magnifying glass icon in the Client Count column.

The bottom window, titled "Entry / Exit Review Client Count", shows a table of household members:

Household Members Included in Review		
Client	Project Start Date	Exit Date
(43) Smith, Baby	01/30/2018	
(3) test, george	01/30/2018	
(46) Testing, Testing	01/30/2018	

At the bottom of this window is the text "Showing 1-3 of 3" and an "Exit" button. A blue arrow points to the magnifying glass icon in the top window.

Additional Assistance

For any additional technical assistance

Email us: helpdesk@ctagroup.org

OR

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

