SANTA MARIA/SANTA BARBARA CONTINUUM OF CARE

Homeless Management Information System

October 2023

HMIS Workflow Manual: Adding a New Client

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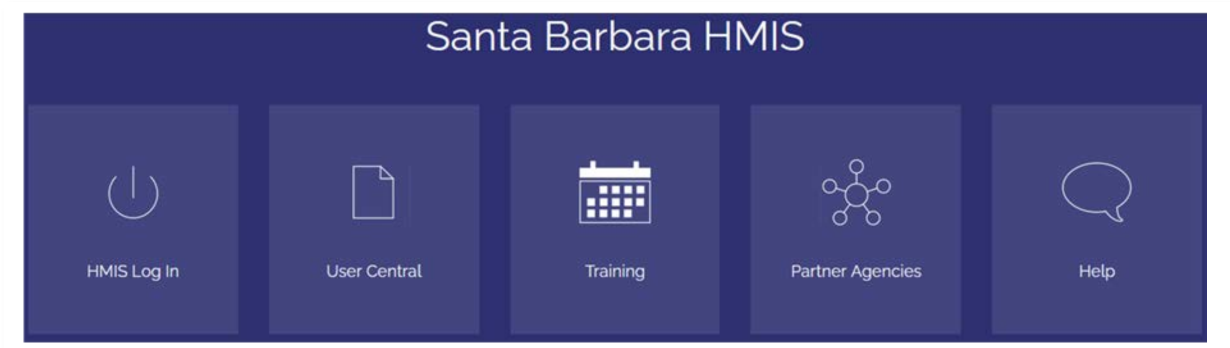
Counts Report: page 35

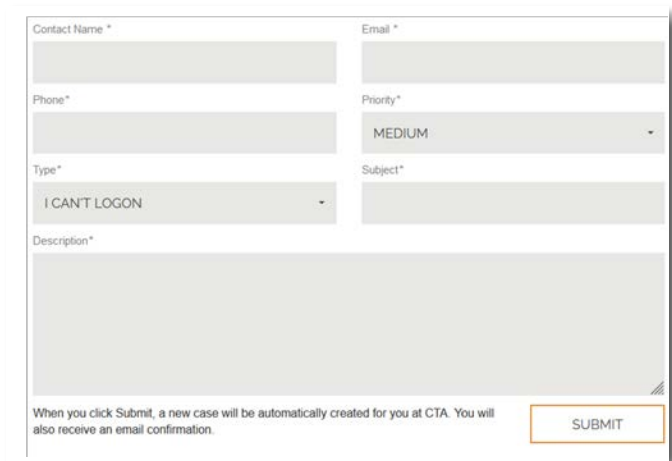
Santa Barbara HMIS Web Portal

The portal is your online resource for HMIS You can find the portal at: https://ctagroup.org/santa-barbara-hmis/

The portal provides the following online resources:



- **HMIS Log in**: click to access your HMIS site.
- **User Central**: repository of workflow manuals, Intake forms and other HMIS-related documents.
- **Training**: Provides details on upcoming trainings. Includes an on-line reservation system for users to sign up for upcoming trainings.
- **Partner Agencies**: A list of HMIS participating agencies.
- **Help**: CTA's Help Desk. HMIS users can quickly file a ticket requesting assistance.
  - To file a request for help: click **Help.**
  - Enter in your name, email, and phone number.
  - Type, Subject, Description: use these field to let us know what the issue is.
  - Note: If it is a client related issue, do not enter their name in the **Description** field. Instead, enter their HMIS client ID.
  - Click **Submit**



HMIS Workflow Overview

Search for client by first name, last name, date of birth, social security number, or any combination:

Greater detail and screenshots of **New Client workflow** begins on page 5.

After searching for the client and there is no match:

Single New Client	New Client in a Household
1. Access HMIS and **Enter Data As** (page 5). **2.** Search for client. If not in HMIS, add client (page 6) **3.** Add **ROI** (page 8) **4.** Add yourself as a **Case Manager** (page 9). **5.** Click **Client Profile.** Enter data in **Client Demographics** (page 10). **6.** Create **Entry** (page 12) **7.** Enter data in **Assessment** (page 13) **8.** Optional: Add **Goals** (page 20). **9.** Optional: Add **Services** (page 22).	**1.** Access HMIS**.** Select your project from **Enter Data As**. **2.** Search for client who is head of household. Add in not in HMIS**.** **3.** Search for each additional household member. Add member if not already in HMIS **4.** Return to head of household. Create household. **5.** Add ROI. **6.** Add yourself as a Case Manager. **7.** Click **Client Profile.** Enter data in **Client Demographics.** **8.** Create **Entry.** **9.** Enter data in **Assessment** **10.** Click on each household member and complete their **Assessment.** **11.** Optional: Add **Goals.** **12.** Optional: Add **Services.**

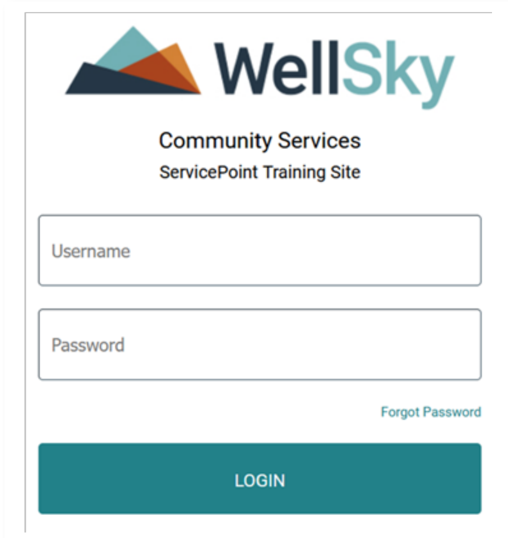
If new client is in a household. Add the new client. Then search for each member. Add any member not already in HMIS. Then access the profile of the client who is the head of household.

Access HMIS

Link to HMIS site:
https://wscs.wellsky.com/santabarbara/com.bowmansystems.sp5.core.ServicePoint/index.html#searchProviders;refresh=true

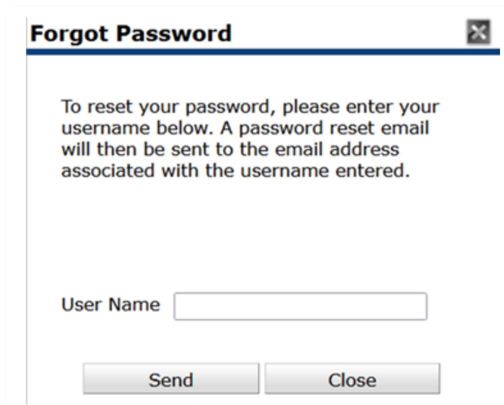
Enter your **Username** and **Password**.

Click **LOGIN**.



Forgot Password
Click **Forgot Password**

- Enter in your username.
- Click **Send.**
- Check your email associated with your HMIS account.
- **Did not receive an email?** Check your Spam.
- **Checked Spam and no email?** Submit a Help ticket.

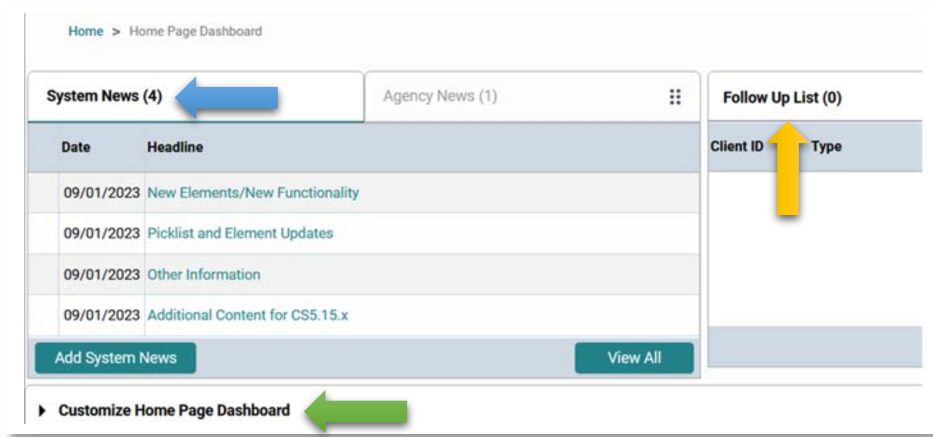


New Single Client Workflow

Always search for the client to ensure the client is not in HMIS before adding a new client. Adding a client who is already in HMIS creates a duplicate client (a client with 2 different client ID numbers).

Step 1: Access HMIS. Enter your username and password. Your **Home Page Dashboard** will display.

- **System News** (blue arrow): The County will post HMIS related information.
- **Follow Up List** (gold arrow): Tag yourself as their case manager, and enter follow up data in the **Goal** or **Services** section. See pages 20 and 22 for details.
- **Counts Report** (green arrow): <u>**Go to Appendix A**</u> if you want to create count reports.



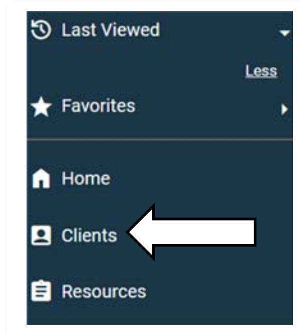
Step 1a: Select your project in **Enter Data As**:
When you access HMIS your name will display at the top right of your screen. Under your name is **Enter Data As**:

- Click on **Enter Data As.**
- One or more projects will display that you have access rights to.
- Locate your project (the project you will be enrolling your client in).
- Click the green plus sign to the left of the project's name. In this example (orange arrow), **CES Coordinated Entry System** is selected.

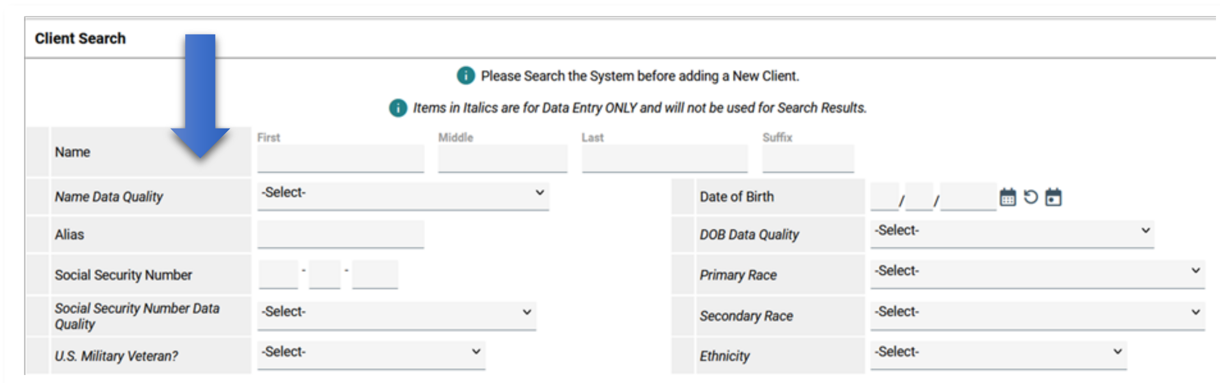
New Client Workflow

Step 2: Search for Client
On the left side of your screen locate Clients (white arrow)

- Click Clients.
- **Client Search** page displays.



Name: enter the first initial of client's **First**, and full last name in Last (blue arrow).



Optional: You can also enter their **Social Security Number** and/or **Date of Birth**.

You may have to scroll down to see the **Search** button:

- Click **Search.**
- **Client Results** will display below.

In this example, there is no match. Client is not in HMIS.

One or more possible matches may display. For example: another client may have the same last name. Review the possible matches to determine if the results are for a different client(s).

New Single Client Workflow: Add New Single Client

Since the client is not in HMIS, scroll back to the top of the page:

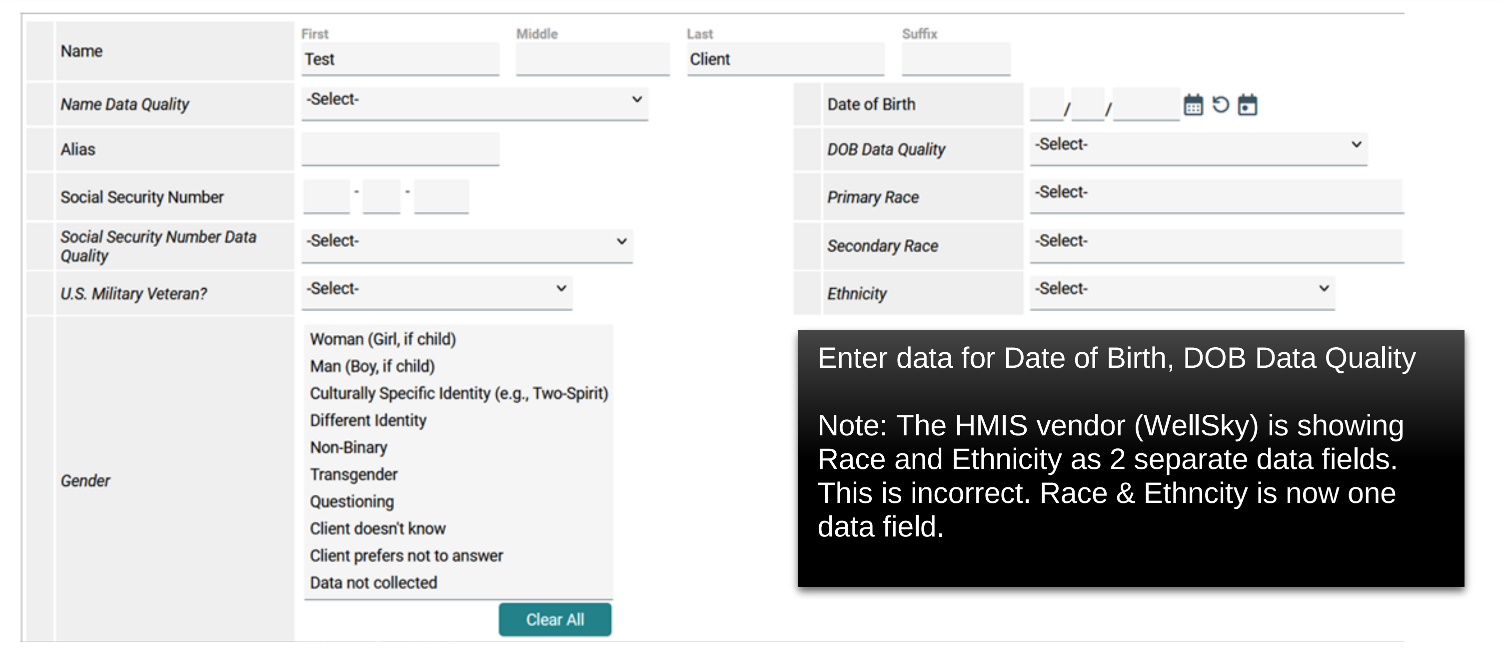
Name: enter their full first name.

Name Data Quality: select best match

Alias (optional): some clients have a nickname or street name.

Social Security Number: enter full SSN or last 4 digits

Social Security Number Data Quality: select best match



US Military Veteran?: select best match.

Gender: select best match

- **Need to make more than 1 selection?** Hold down the CTRL key and click on two or more answers.
- **Made a wrong selection?** Click **Clear All** and begin again.

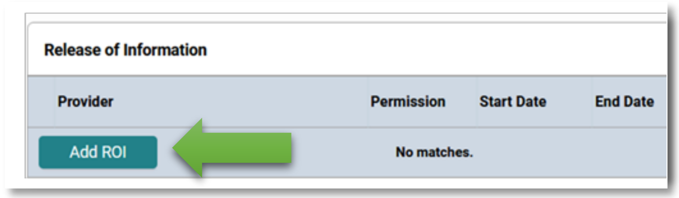
Finished entering data? Scroll down and click **Add New Client With This Information**. A pop-up window will display asking you to confirm you want to add this client. Click OK.

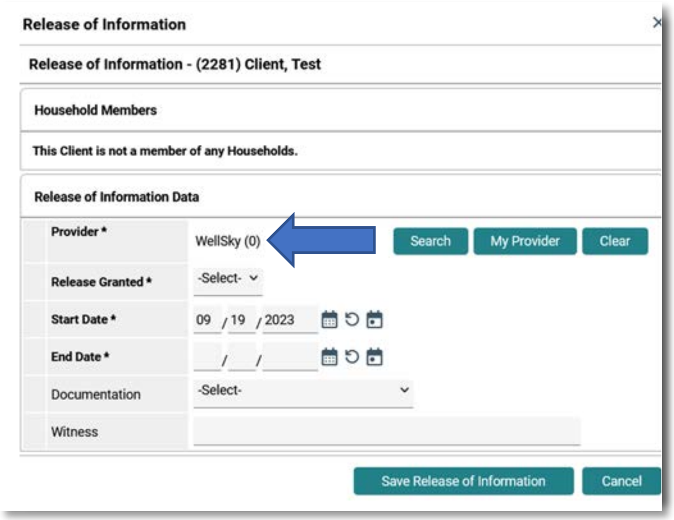
New Single Client Workflow: Add ROI

The Client's Summary page will display. In this example, the client is single. The client is not in a household with other people.

Step 3. Add the Release of Information (ROI)

- Click **Add ROI** (green arrow)





Release of Information page displays:

- **Provider:** the name of the project you selected at "Enter Data As" will display.
- Need to change? Click **Search,** select correct provider.
- **Release Granted:** select best match.
- **Start Date:** defaults to today's date. Change if necessary.
- **End Date:** enter 3 years after **Start Date**.
- **Documentation:** select best match.
- **Witness** (optional): Some agencies may require a witness attend when reviewing the ROI with a client.
- Click **Save Release of Information.**

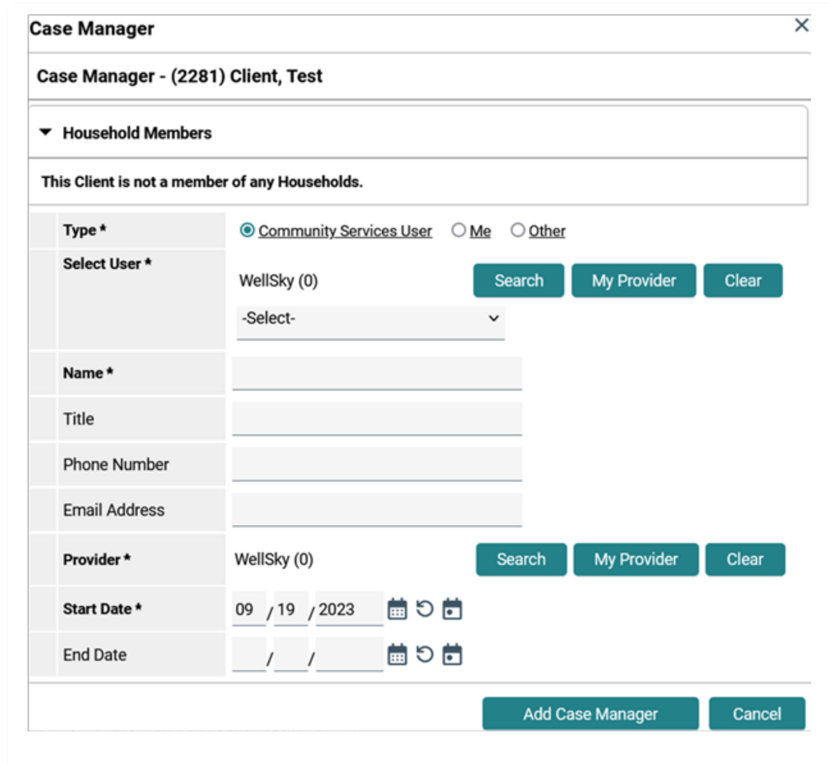
New Single Client Workflow: Case Manager

Step 4: Add yourself as a case manager. <u>This step is optional</u>.

- Adding yourself as a case manager allows you to use the Follow Up List feature and,
- Create Counts Reports.

Scroll down to **Case Managers** and click **Add Case**.

- **Type:** select **Me.**
- **Someone else is the case manager?** Click **Other**. Enter in their name and contact information.
- **Name:** If you selected Me, your name will display.
- **Title:** enter your job title.
- **Phone Number:** enter work number.
- **Email Address:** enter work email address.
- **Provider:** defaults to the provider you're entering data as.
- **Start Date:** defaults to today's date.
- **End Date:** leave blank.
- Click **Add Case Manager.**

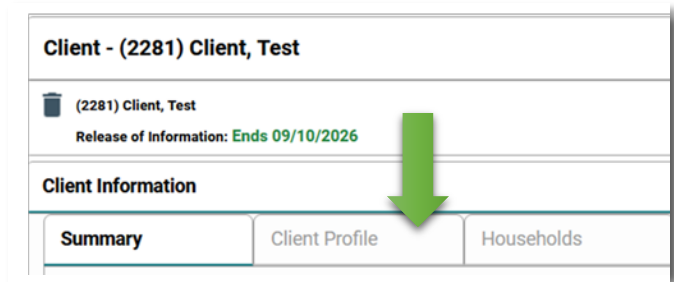


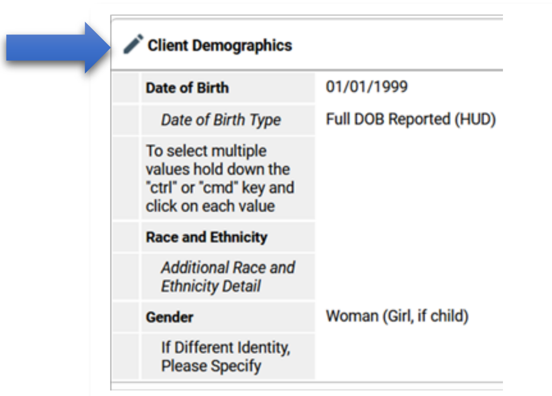
New Single Client Workflow: Complete Client Demographics

Step 5

Scroll to the top of the page until you see the **Client Profile** tab:

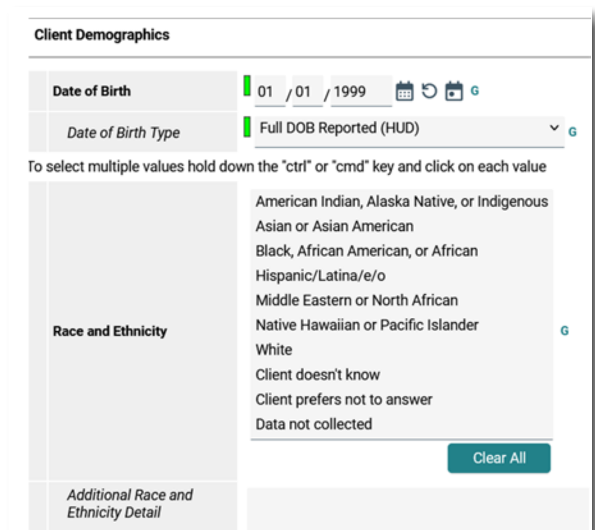
- Click Client Profile (green arrow).
- Click the pencil icon to left of **Client Demographics** (blue arrow).





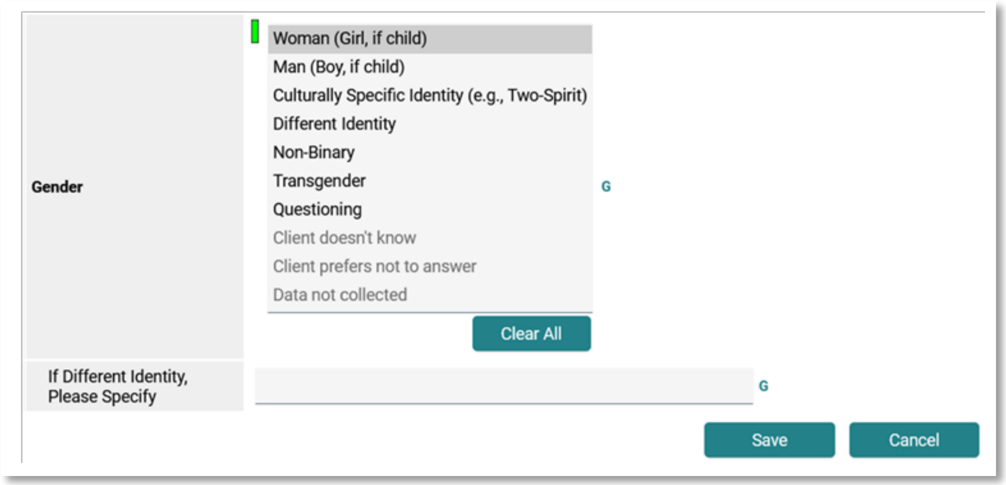
The Client Demographics page will display. Any data you entered when you created the client will display. Example: **Date of Birth**.

- Race & Ethnicity: select best match.
- **Need to select more than one?** Hold down the **CTRL** or **CMD** key and select two or more answers.
- **Made a wrong selection?** Click **Clear All**, then start again.
- **Additional Race and Ethnicity Detail** (optional): You can enter text if the client provided additional information about their race and ethnicity.



Scroll down until **Gender** displays.

New Single Client Workflow: Complete Client Demographics



Gender: select best match.

Need to select more than one match? Hold down the CTRL or CMD key and select two or more answers.

Made a mistake? Click **Clear All** and start again.

If Different identity, Please Specify: If Different Identify selected in the **Gender** data field, add text to detail how the client self-identifies in regards to gender.

Click **Save**.

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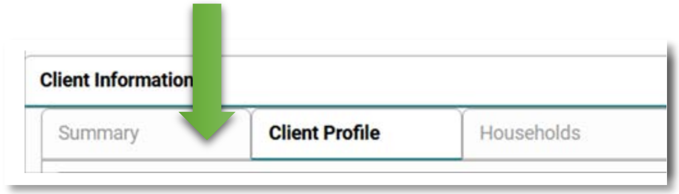
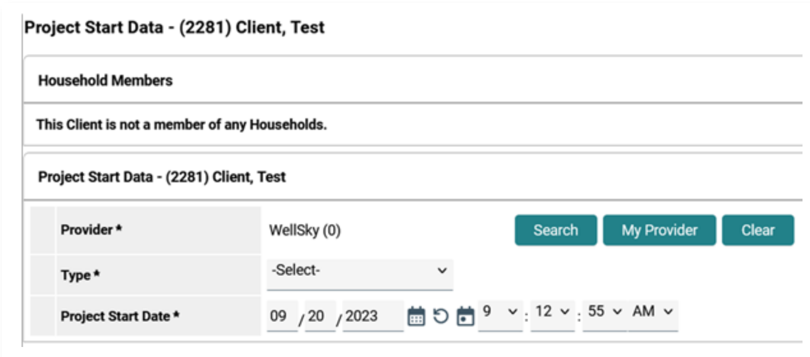
New Single Client Workflow: Create Project Entry



Step 6
Click the **Summary** tab (green arrow), then locate the **Entry/Exits** box on the right hand side of the screen.

- Click **Add Entry/Exit**.
- The **Project Start Data** box will display.



- **Provider:** the "enter data as" project you selected will display.
- **Need to change Provider?**: click **Search** to select the correct provider.
- **Type:** select **HUD**.
- **Note: <u>SSVF selects VA for Type</u>**.
- **Project Start Date**: defaults to today's date. Change if necessary. Example: if you enrolled your client into your project on 9/19/2023, change the start date to that date.
- Click **Save & Continue**.
- The Intake Assessment for your project will display.

New Single Client Workflow: Enter Data in Assessment

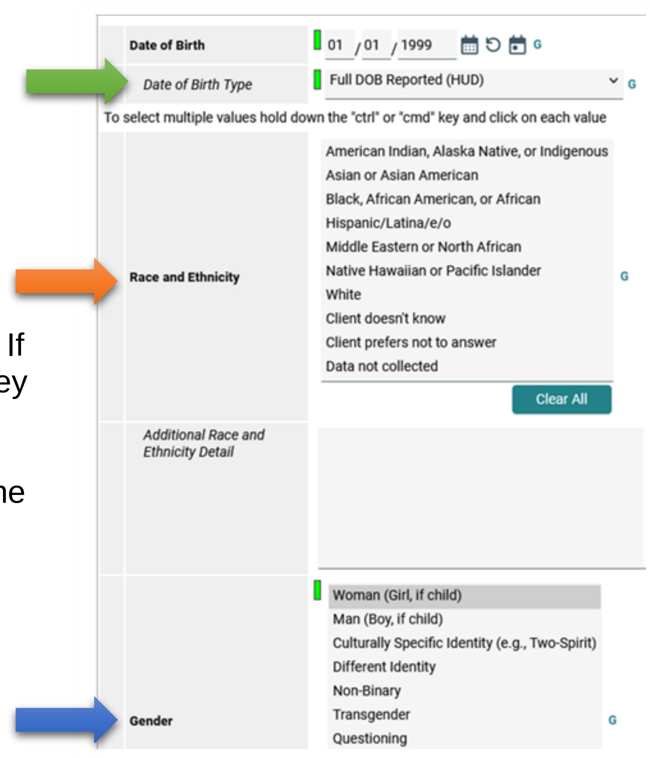
Step 7
Data entered to add the client to HMIS will display in the Assessment.
For example: **Date of Birth** (green arrow).

Gender (blue arrow): the answer you selected when adding the client: **Women (Girl, if child)** is highlighted in grey. However, nothing is highlighted in grey for Race and Ethnicity (orange arrow).

If **Race & Ethnicity** does not display an answer, click on the best match. If you need to select more than one match, hold down the CTRL or CMD key to select two or more matches.

Additional Race and Ethnicity Detail: Optional data field. Enter text if the client has self-disclosed additional details on their race/ethnicity.

Enter data for all remaining applicable data fields.
<u>Any data fields in bold with a * must be answered in order to create the project entry</u>.

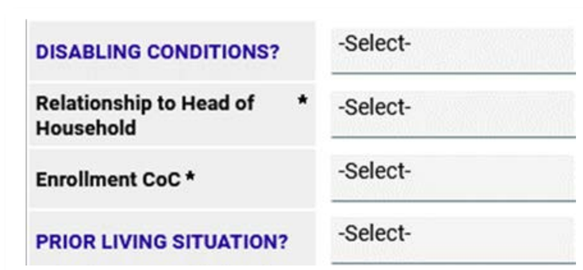


Disabling Condition: select best match

Relationship to Head of Household: for a single client, select **Self (head of household)**.

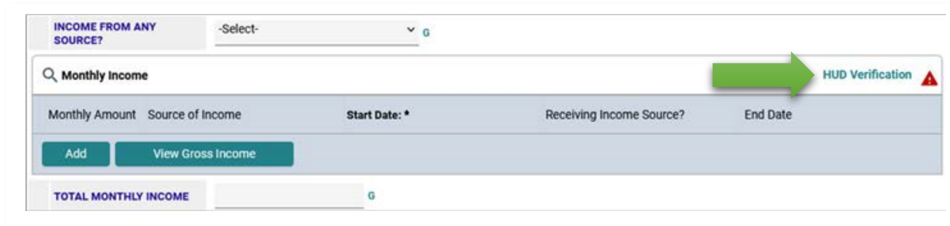
Enrollment CoC: select **CA-603** for Santa Maria/Santa Barbara.

Prior Living Situation: select best match. **Prior Living Situation** is where the client spent last night.



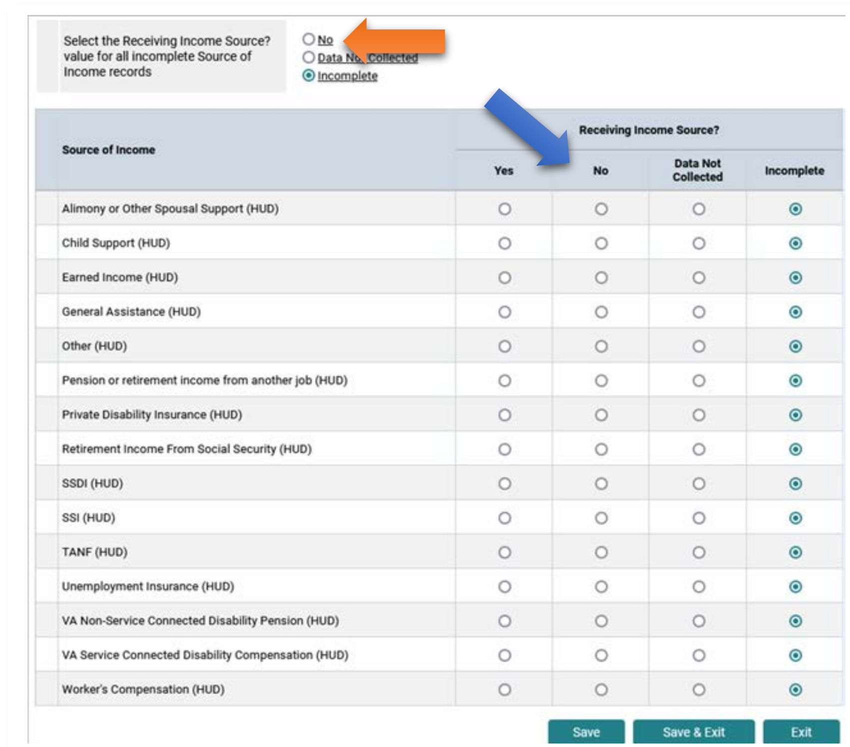
New Single Client Workflow: Create Project Entry

Continue to enter data into all applicable data fields. This next section will detail how to complete the **HUD Verification** process for **Monthly Income, Non-Cash Benefits, Health Insurance, and Disability**.



<u>Monthly Income</u>

- **Income from any source?** Select best match.
- Click **HUD Verification** (green arrow).



Select the Receiving Income Source?: Select **No** (orange arrow).

All the boxes in the **No** column (blue arrow) will turn blue.

If you entered <u>**No**</u> for **Income from any source?**

- Click **Save & Exit**.

Did you answer <u>Yes</u> for Income from any source?

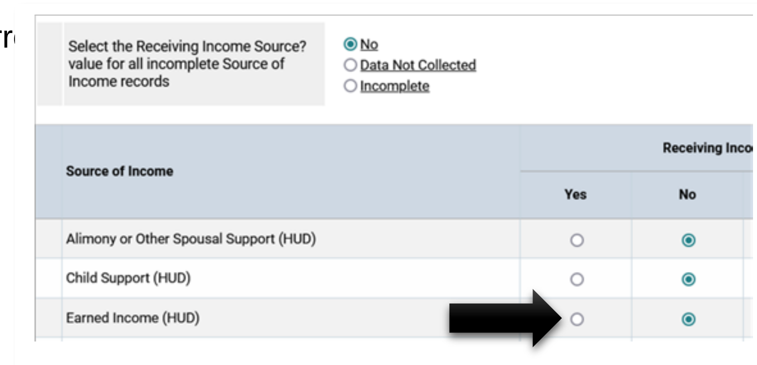
- Locate the best match as to the source of that income.
- See next page for details on next steps.

New Single Client Workflow: Create Project Entry

Monthly Income (continue from pervious page)

If you answered **Yes** for **Income from any source?** locate the best match for that income source. In this example the client is receiving **Earned Income**:

- Click on the **Yes** button for **Earned Income** (black arr
- The **Add Recordset** pop-up will display.



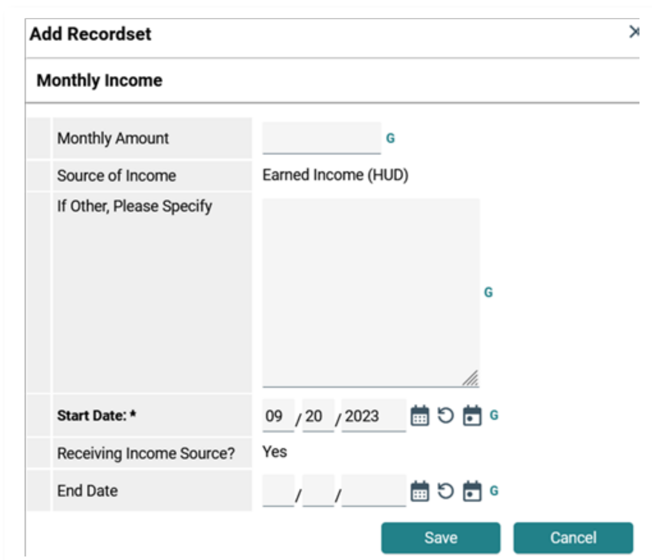
Monthly Income: enter the monthly amount.

Start Date: defaults to today's date. Change if necessary.

Receiving Income Source? Defaults to **Yes**.

End Date: leave blank.

Click **Save**.

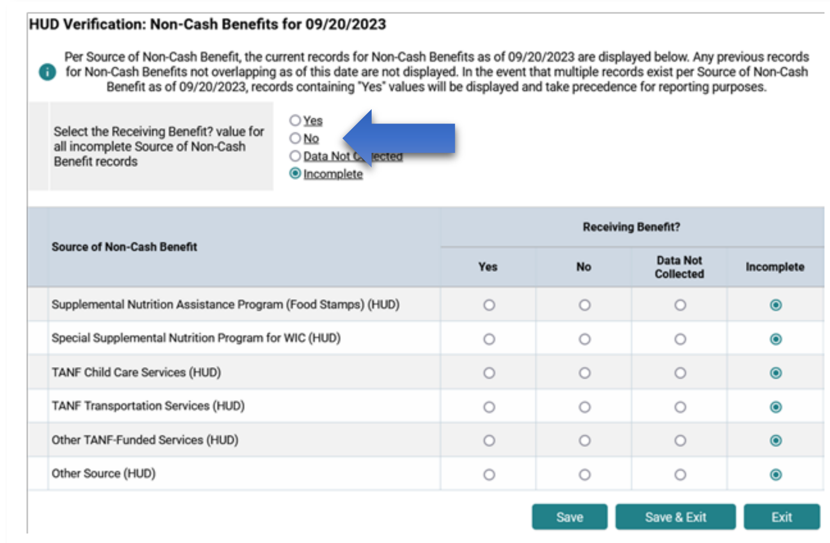


Client has more than one income source?
Repeat the process detailed on this page.

Click **Save & Exit** when done.

HUD Verification will change to:

New Single Client Workflow: Create Project Entry



<u>Non-Cash Benefits</u>

- **Non-Cash Benefits from any Source?** Select best match.
- Click **HUD Verification.**
- Follow the same process as for **Monthly Income.**
- Click No (blue arrow).
- All circles in the **No** column will turn blue.

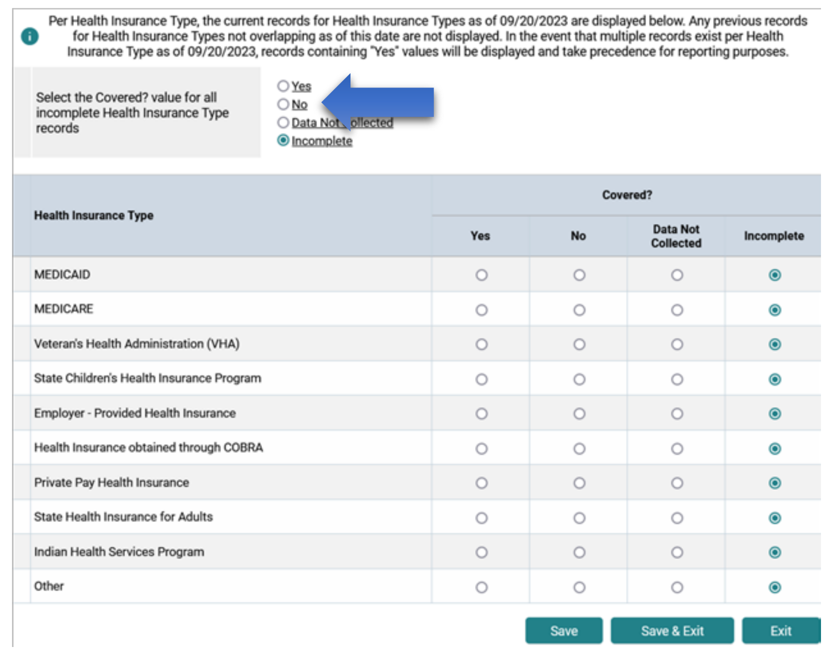
If <u>**No**</u> selected for **Non-Cash Benefits from any Source?** Click **Save & Exit.**

If <u>**Yes**</u> selected for **Non-Cash Benefits from any Source?**

- Locate Non-Cash Benefit. Click the circle in the **Yes** column.
- Repeat this process if the client has more than one non-cash benefit.
- Click **Save & Exit** when done.

HUD Verification will change to:

New Single Client Workflow: Create Project Entry



<u>**Health Insurance**</u>

- **Covered by Health Insurance?** Select best match.
- Click **HUD Verification.**
- Follow the same process as for **Monthly Income.**
- Click No (blue arrow).
- All circles in the **No** column will turn blue.

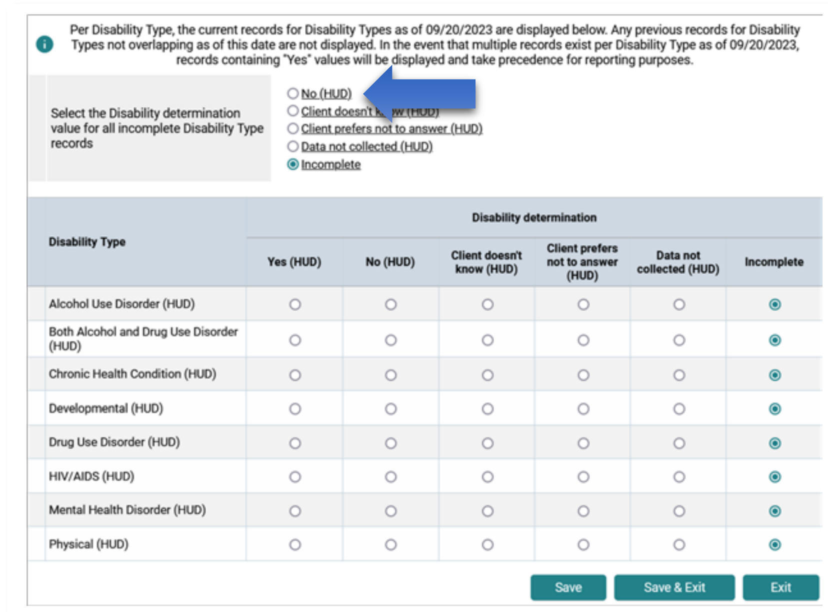
If <u>No</u> selected for **Covered by Health Insurance?** Click **Save & Exit.**

If <u>Yes</u> selected for **Covered by Health Insurance?**

- Locate insurance. Click the circle in the **Yes** column.
- Click **Save & Exit** when done.

HUD Verification will change to:

New Single Client Workflow: Create Project Entry



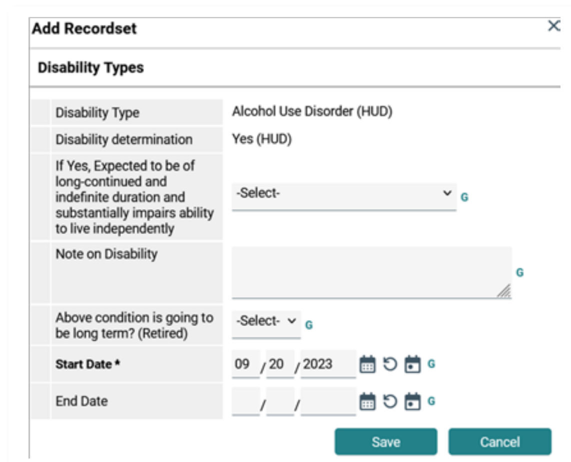
Disability Types

- Click **HUD Verification.**
- Follow the same process as for **Monthly Income.**
- Click No (blue arrow).
- All circles in the **No** column will turn blue.

If client has no disability types: Click **Save & Exit.**

If client has one or more disability types:

- Locate type. Click the circle in the **Yes** column.



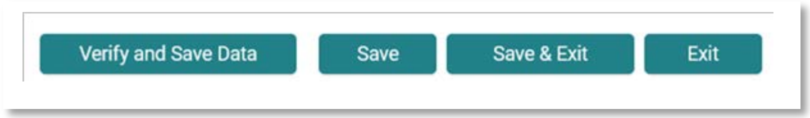
- The **Add Recordset** pop-up will displa
- **If Yes, Expected to be of long continued ...:** Select best match.
- **Note on Disability:** optional to enter data.
- **Start Date:** defaults to today's date. Change if necessary.
- **End Date:** leave blank.
- Click **Save.**
- Repeat process if more than one disability type.
- Click **Save & Exit** when done.

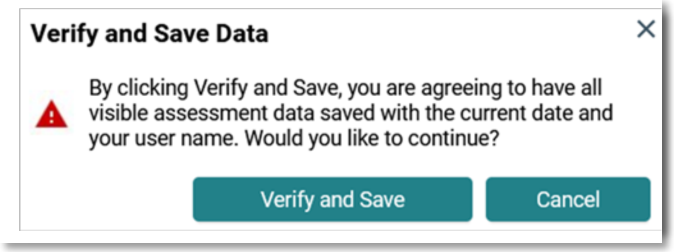
HUD Verification will change to:

New Single Client Workflow: Create Project Entry

Enter data for the remaining data fields, including **Domestic Violence**, **Current Living Situation**, and **Coordinated Entry Event**.

At the bottom of the page you will see:





- Click **Verify and Save** Data and a pop-up will display.
- Click **Verify and Save** to save the data saved with the current date and with your user name, or
- Click **Cancel** if you prefer not to.

- Click **Save** if you want to save the data you have entered, but will continue entering data.

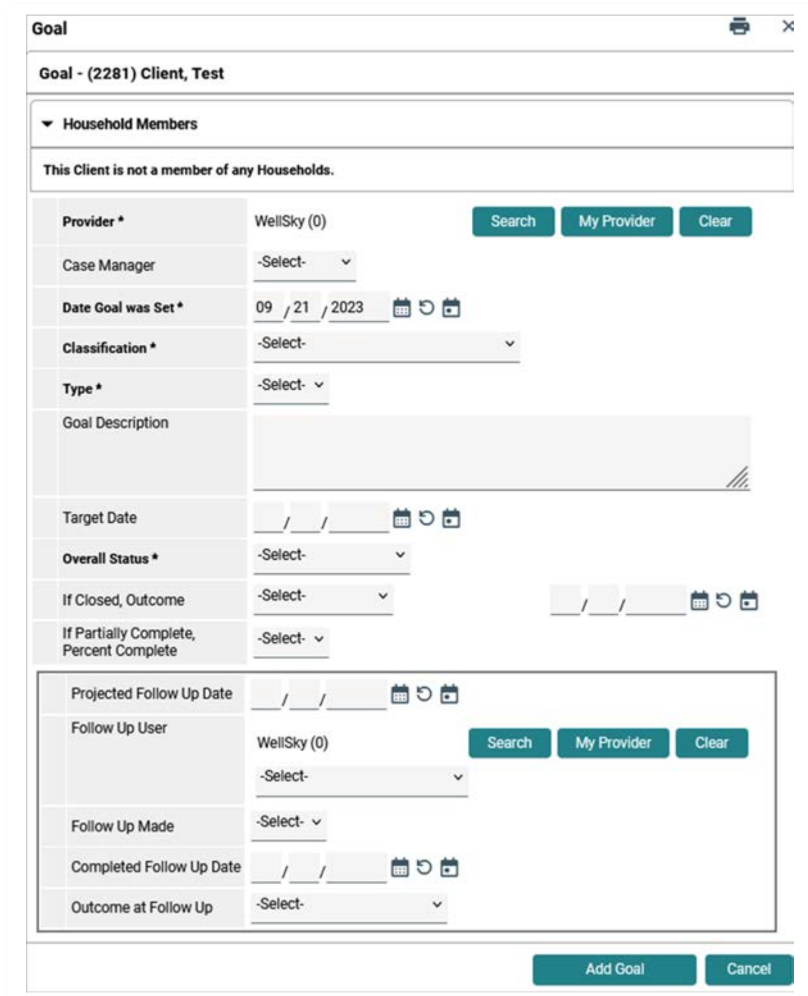
- Click **Save & Exit** when you have completed the assessment.

New Single Client Workflow: Goal

Step 8

Adding a Goal is an optional feature. To set a goal, schedule meetings, and track outcomes:

- Locate the Goal box on the **Client Summary** page.
- Click **Add Goal.**

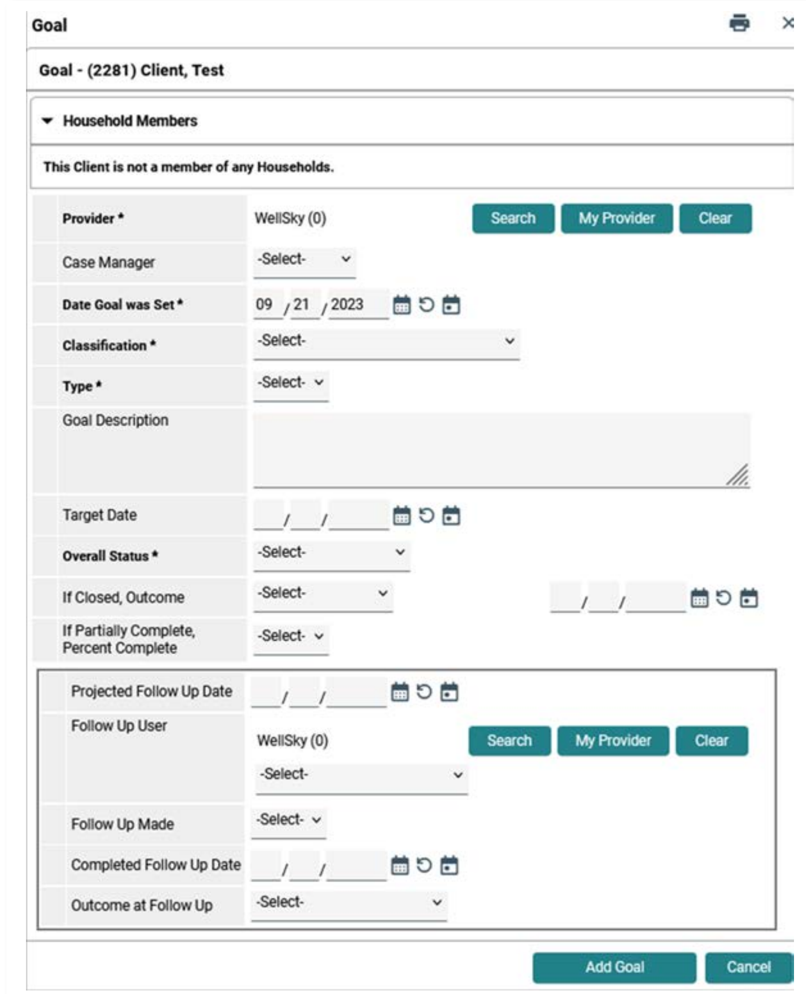


- **Provider**: defaults to the provider you selected at “enter data as”.
- **To change provider**: click **Search**, then select the provider.
- **Case Manager**: select yourself. In some cases, you may be able to select another case manager in your agency.
- **Date Goal was Set**: defaults to today’s date. Change if necessary.
- **Classification**: select best match.
- **Type**: select best match.
- **Target Date**: (optional) Enter date if the intent is to achieve the goal by a certain date.
- **Overall Status**: select best match.
- **If Closed, Outcome**: select best match.
- **If Partially Complete, Percent Complete**: select best match.

Don’t want to add Follow Up data? Click **Add Goal**.
Want to add follow up data? Continue to next section.

New Single Client Workflow: Goal

See previous page for details on how to complete this section.



Projected Follow Up Date: enter a date if you want to schedule a meeting with the client.

Follow Up User: defaults to your project.
Select: select yourself or another case manager.

Follow Up Made: Enter **Yes** or **No** after the projected follow up date.

Completed Follow Up Date: enter the date you met with the client.

Outcome at Follow Up: select best match.

Click **Add Goal**.

New Single Client Workflow: Services

Step 9
Adding a service is an optional feature. Some projects enter service data as part of their case management strategy. To enter data for a services provided to the client:

- Locate Services on the **Client Summary** page.
- Click **Service** to add one service, **OR**
- Click **Multiples Services** to add more than one.

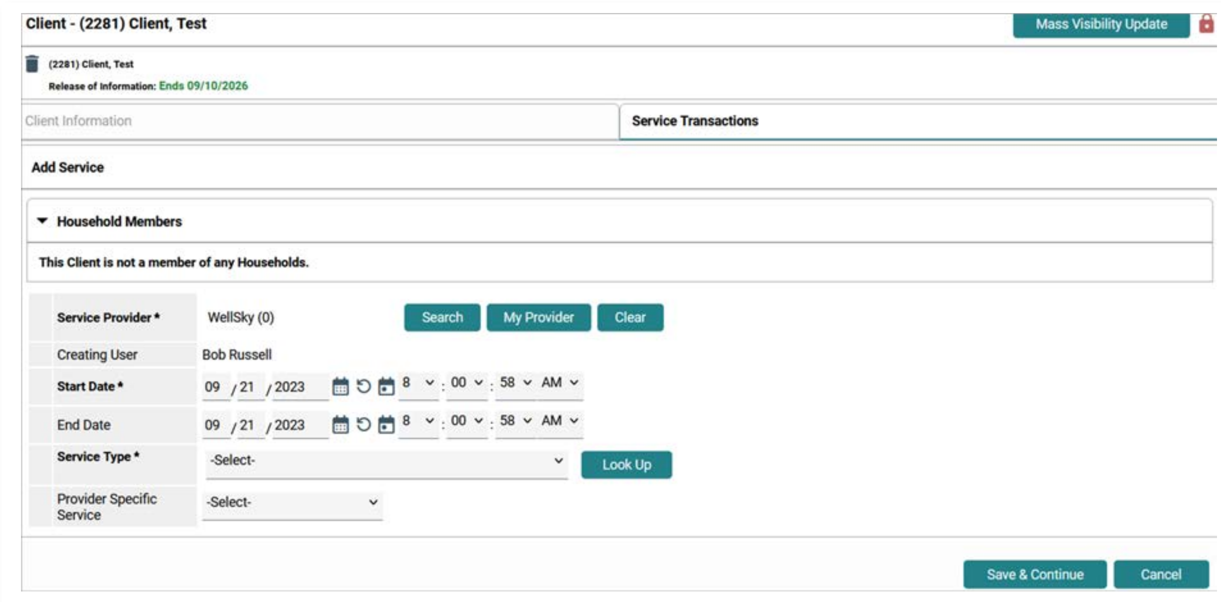
Service Provider: defaults to the project you selected at "enter data as"

Start Date and **End Date:** defaults to today's date. Change if necessary.

Service Type: select best match.

Provider Specific Service: some projects have a customized list of services.

Click **Save & Continue**.

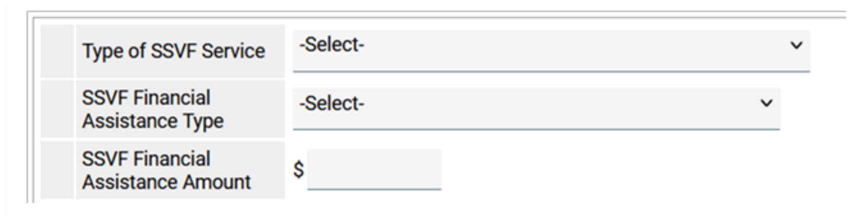


New Single Client Workflow: Services

Clicking **Save & Continue** will result in the **Edit Services** page displaying.

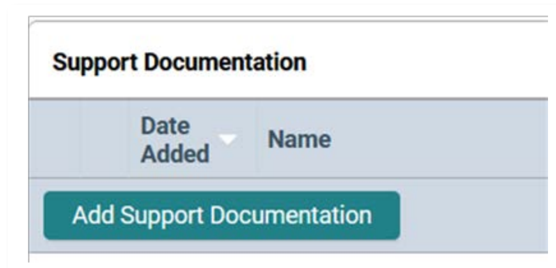
<u>If you are a SSVF provider</u>, scroll down until this section displays:

- **Type of SSVF Service**: select best match.
- **SSVF Financial Assistance Type**: select best match.
- **SSVF Financial Assistance Amount**: enter amount.



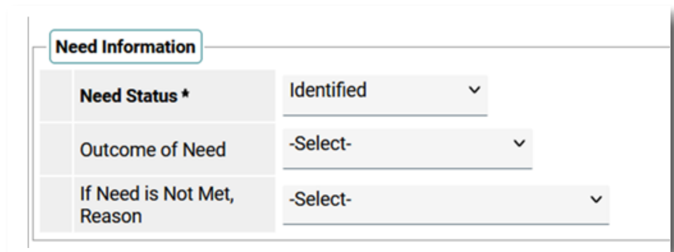
<u>If you want to add support documentation</u>:

- Click **Add Support Documentation.**
- A pop-up window displays.
- Click **Browse** to select a document from your computer.
- Description: (optional) Enter description of document.
- Click **Upload**



<u>To complete Need Information</u>

- Need Status: defaults to Identified. Change if necessary.
- **Outcome of Need**: select best match.
- **If Need Not Met, Reason**: select best match.



Click **Save & Exit** when done.

New Client in a Household Workflow

What does a client in a household mean?
There are one or more people who live with the client. These people can be family members (spouse, child), or they can be friends, roommates, etc.

Entering data in HMIS for a new client in a household is similar to entering data for a single client. The key differences include:

- Search for, and add, each household member to HMIS.
- Create the household.
- Determine who is the head of household (HoH), then determine the relationship of each household member to the HoH.
- Complete the adult assessment for each adult member of the household and/or complete the child assessment for each child/minor in the household.
- Include the household when adding the Release of Information (ROI), project entry, etc.

The following pages will detail how to create a household and how to correctly enter data for the household. **If the process of entering data for a household is the same as entering data for a single client, then the page number in <u>New Single Client Workflow</u> will be cited.**

Here's the scenario we'll follow in detailing how to correctly enter data for a new client in a household:

- Your new client is a single mom with one child.
- Neither the mom, nor the child are in HMIS.
- The next pages will detail how to create the household, then enter data for the household. The steps outlined on the following pages are the same for households with more members and for different types of households.

New Client in a Household Workflow

Step 1

Access HMIS, then select your project from **Enter Data As**.

- **How do I access HMIS?** Go to **Access HMIS, page 4**.

- **How do I Enter Data As?** When you access HMIS your name will display at the top right of your screen. Under your name is **Enter Data As**:
- Click on **Enter Data As.**
- One or more projects will display that you have access rights to.
- Locate your project (the project you will be enrolling your client in).
- Click the green plus sign to the left of the project's name. In this example (orange arrow), **CES Coordinated Entry System** is selected.

Step 2

Your clients are a single mom (the head of household) and her child. Search for each client, then add each client to HMIS.

- **How do I search for a client?** Go to **Search for Client, page 6**.

Step 3

Add each new client to HMIS.

- **How do I add clients to HMIS?** Go to **Add New Client, page 7**.

Best Practice in adding household members to HMIS

- Start by searching for the Head of Household (HoH)
- Add the HoH to HMIS.
- Search for the next member of the household.
- Add that member to HMIS.
- Repeat the process until all members added.
- Create the household immediately after adding all members to HMIS.

New Client in a Household Workflow: Create Household

Step 4: Create the household.
In this scenario, 2 new clients have been added: **Client Test** (mom), and Daughter Test (child).

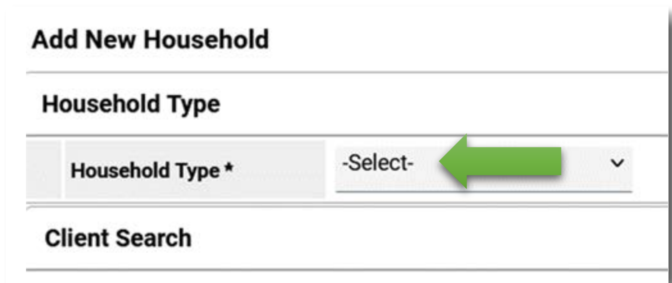
If you create the household immediately after adding all members to HMIS, you can use the **Recently Viewed** feature.

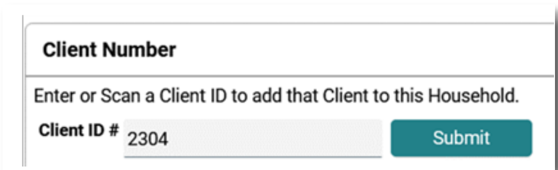
How do I use the Recently Viewed feature? Locate Recently Viewed on the left side of your screen. Click on it.

Click on **Recently Viewed** displays the two clients added:

Since **(2281) Test, Client** is the Head of Household (HoH) click on the client's name to access their **Summary** page.

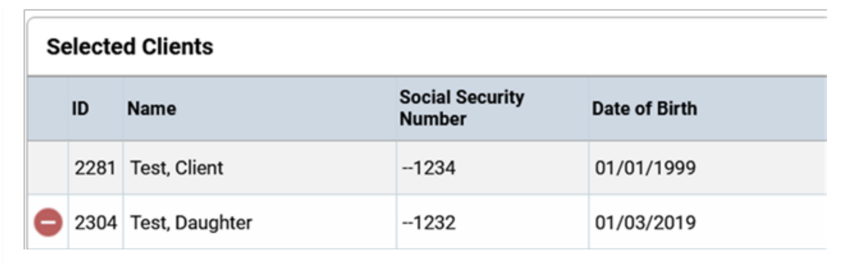
- Scroll down to the Households box. Click **Start New Household**.
- The Add New Household displays.
    - **Household Type**: select best match (green arrow). In this scenario **Female Single Parent** is the best match.
    - Immediately below is **Client Search**.
    - Since you know the daughter's HMIS ID (it is displayed in **Recently Viewed**)
    - Scroll down **Client Number**. Enter the daughter's HMIS number.
    - Click **Submit**.





New Client in a Household Workflow: Create Household

After clicking **Submit**, the daughter appears in **Selected Clients**.


Selected Clients

ID	Name	Social Security Number	Date of Birth
2281	Test, Client	--1234	01/01/1999
2304	Test, Daughter	--1232	01/03/2019

<u>More members to add</u>? Repeat this process until all members display in **Selected Clients**.

<u>Don't know the HMIS number of a member</u>? Use the **Client Search** feature (where you enter the client's first and last name).

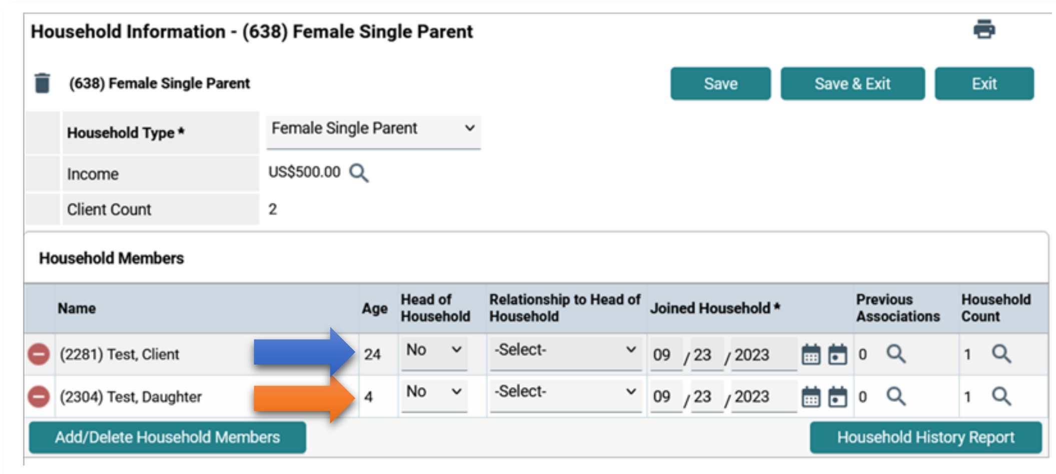
Click **Continue**.

Household Information displays. Since **<u>Test, Client</u>** is the head of household (blue arrow), change:

- **Head of Household**: select **Yes**.
- **Relationship to Head of Household**: automatically changes to **Self**.

Since **<u>Test, Daughter</u>** is the child (orange arrow), change:

- **Head of Household**: select **No**.
- **Relationship to Head of Household**: select **Daughter**.

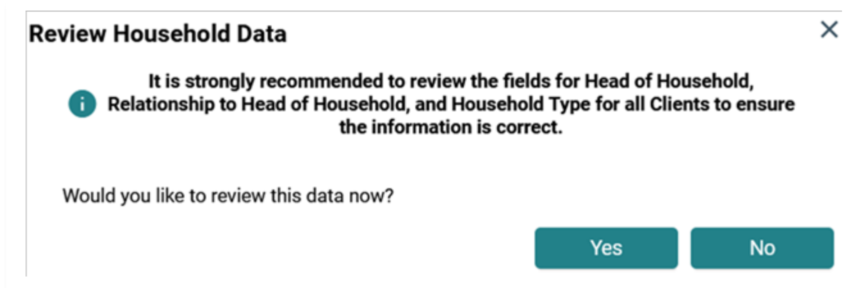


Scroll down and click **Save & Exit**.

New Client in a Household Workflow: Create Household

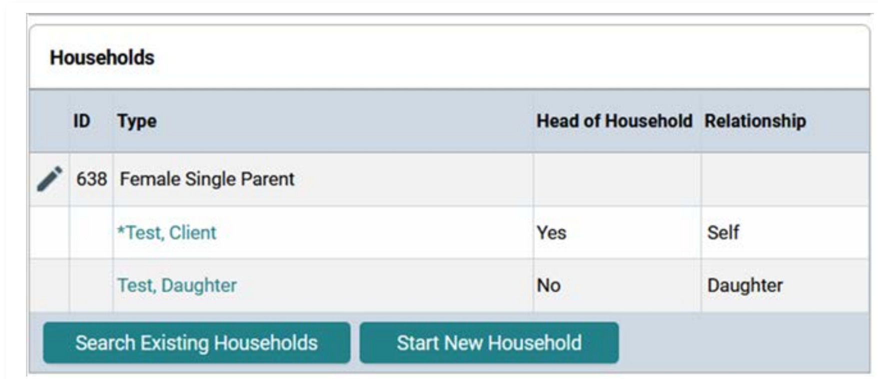
The **Review Household Data** displays.

- Click **Yes** to review.
- Click **No** if everything appears in order.



The page refreshes and returns to the Head of Household's **Summary page**.

Scroll down to the **Households** box to view the household created.



New Client in a Household Workflow: Add ROI

Data entry for the ROI is similar to the data entry for a single client. The key difference is you can complete an ROI for all household members at the same time.

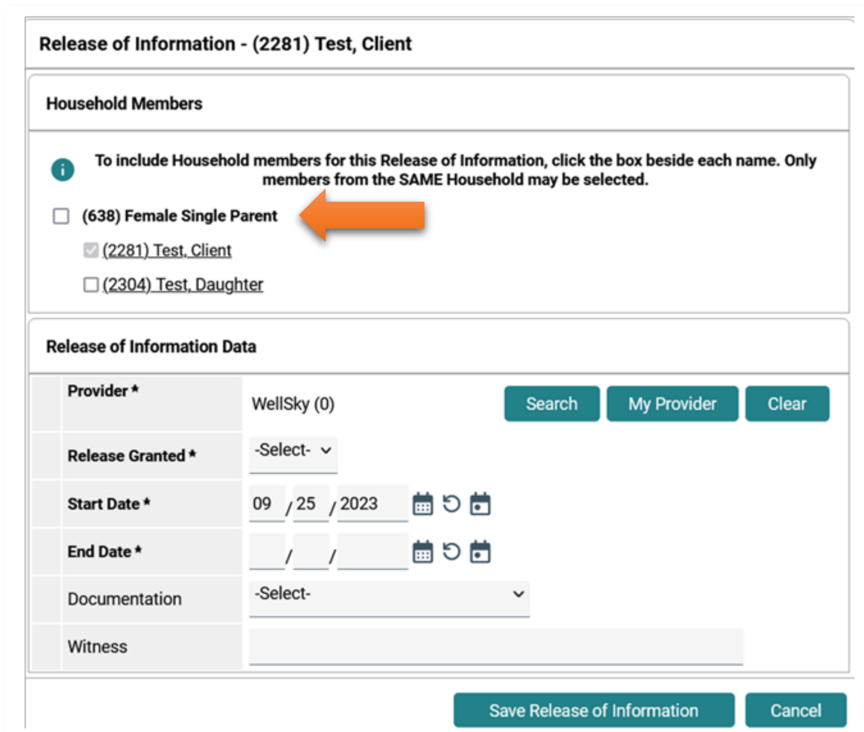
Access the head of household's HMIS file. Locate the **Release of Information** box. Click **Add ROI** (green arrow).

Click the box to the left of (638) **Female Single Parent** to include all household members?

What if the household contains members that will not be included in the ROI? Click the box to the left of each member to include in the ROI.

Refer to **New Single Client Workflow: Add ROI** (page 8) for details on how to complete the ROI.

Click **Save Release of Information** when done.



New Client in a Household Workflow: Case Manager

Adding yourself (or another person) as a case manager is similar to the process for a new single client. As with the Release of Information, the key difference is you can assign yourself as the case manager to all household members at the same time.

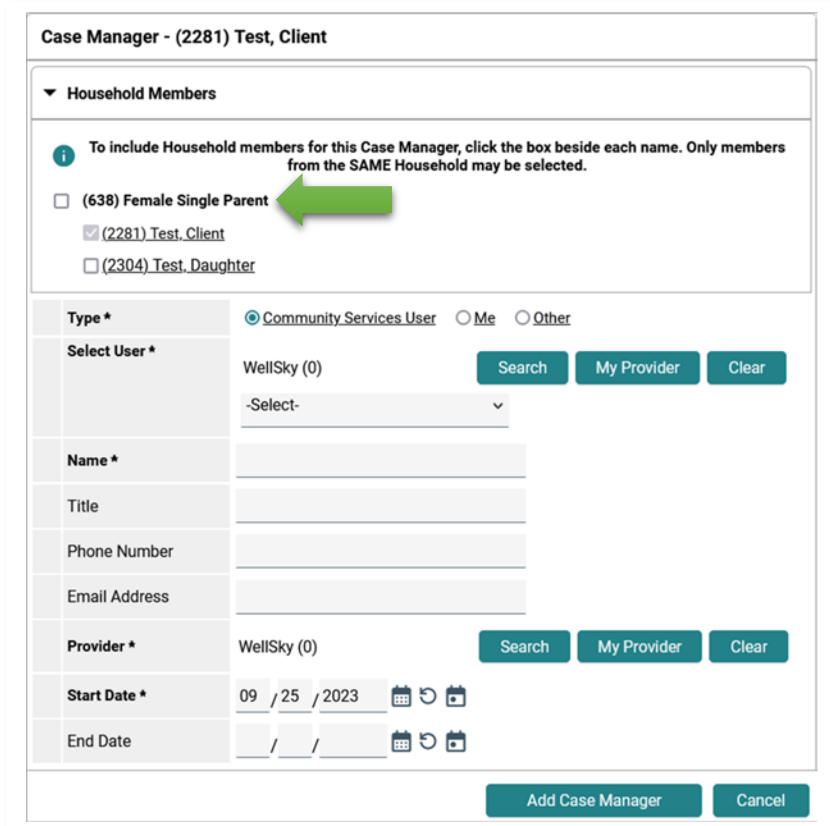
Access the Head of Household's **Summary** page. Scroll down until you see the **Case Managers** box. Click **Add Case Manager**.

Click the box to the left of (638) **Female Single Parent** (green arrow).

What if there are household members I do not want to assign myself as a case manager? Click the box to the left of each member's name.

Refer to **New Single Client Workflow: Case Manager** (page 9) for details on how to complete.

Click **Add Case Manager** when done.



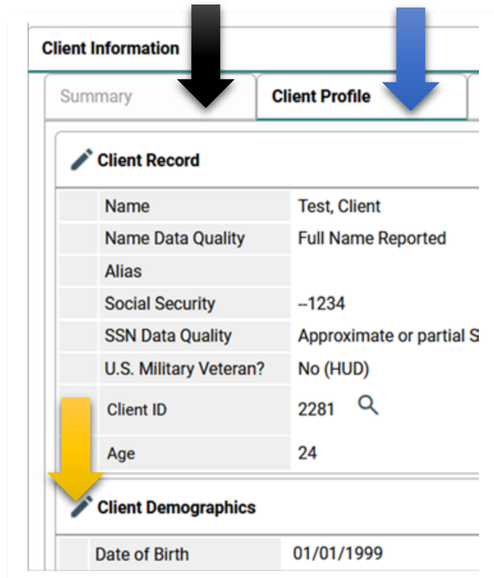
New Client in a Household Workflow: Complete Client Demographics

Unlike the **Release of Information** and **Case Manager**, **Client Demographics** has to be completed separately for each household member.

From head of household's Summary page, click **Client Profile** (blue arrow).

Click the pencil icon to left of **Client Demographics** (gold arrow).

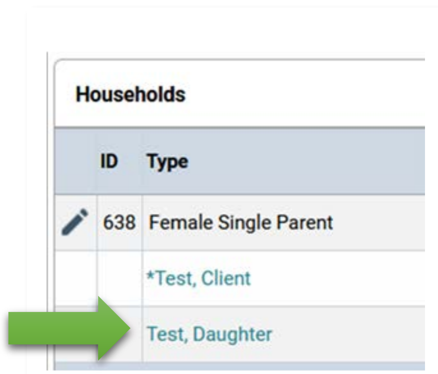
Enter data, then click **Save**.



Click **Summary** (black arrow). Scroll down until you can see the Households box. Click on the next member's name. In this example, it's **Test, Daughter** (green arrow).

Click **Profile**, then complete the same process as cited above.

Repeat this process until **Client Demographics** has completed for each household member.



New Client in a Household Workflow: Complete Project Entry

The Project Entry can be completed at the same time for all household members.

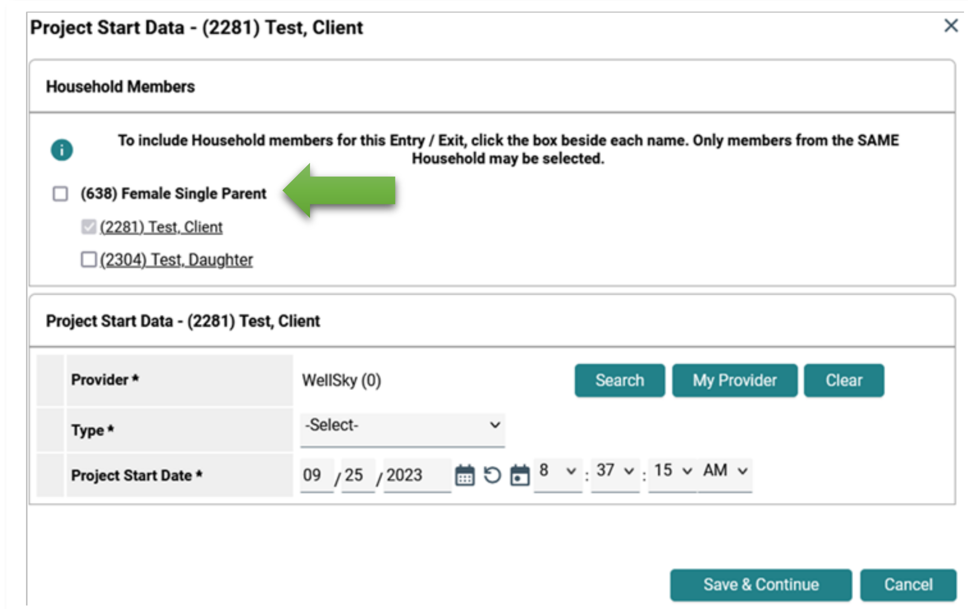
Best practice: Create the project entry from the head of household's Summary page.

On the head of household's **Summary** page, locate the **Entry/Exits** box, then click **Add Entry/Exit**.

The **Project Start Data** page displays.

Click box **(638) Female Single Parent** to include all members in the project entry (green arrow).

Go to **New Single Client Workflow: Create Project Entry** (page 12) for details on how to create the entry.



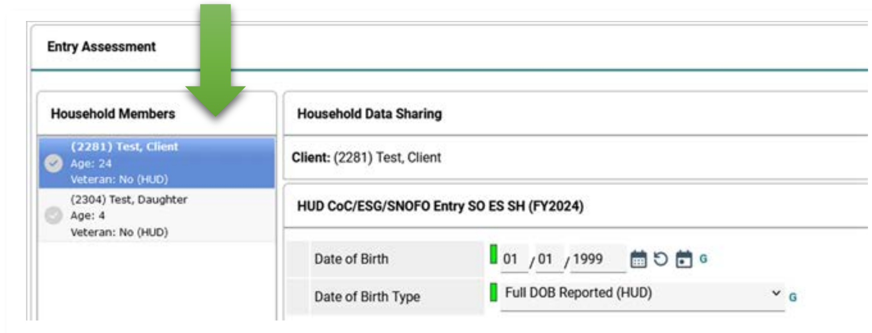
New Client in a Household Workflow: Complete Assessment

Although you can enter a project entry for all household members, you will need to complete an assessment for each individual in the household.

After creating the project entry, the **Intake Assessment** will display for the head of household.

Instructions for completing the assessment can be found in **New Single Client Workflow: Enter Data in Assessment**, starting on page 13.

The other member(s) in the household display under **Household Members** (green arrow). The age for each member is also listed.

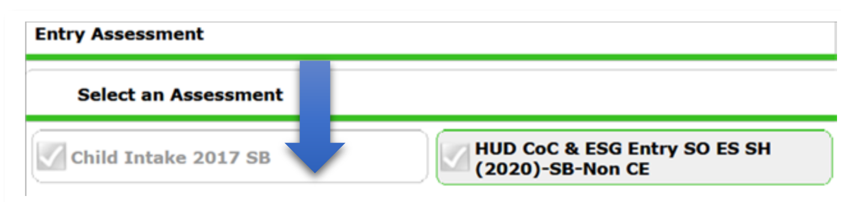


<u>For every adult in the household</u>: Click on their name and complete the same assessment as completed for the head of household. **<u>Complete an assessment for all adults before completing an assessment for any child</u>.**

<u>For every child (minor) in the household</u>:

- Do not click on their name just yet
- Instead look above the list of Household Members to see a list of Assessments
- Click on Child Intake (blue arrow)
- Then click on child's (minor) name under Household Members

<u>Why do this</u>? The Child Intake assessment contains fewer questions than the Adult Intake. If you click on the child's name before clicking on the Child Intake, the Adult assessment displays.



Enter data for the child, then click **Save & Exit**.

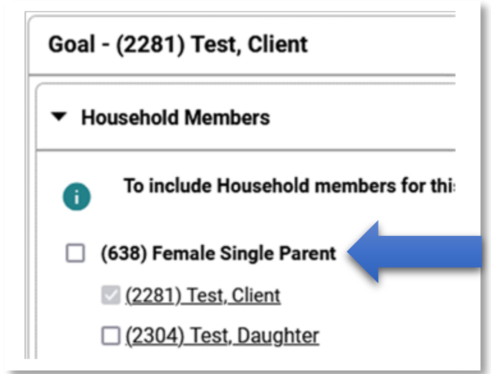
Complete this process for any other children in the household.

New Client in a Household Workflow: Adding Goals and Services (optional)

A goal or a service can be added for the entire household.

To enter a **Goal** for the household:

- On the head of household's **Summary** page, scroll down until the **Goal** box display. Click **Add Goal**.
- Click the box to left of (638) Female Single Parent (blue arrow)
- Follow the data entry instructions for **New Single Client Workflow: Add Goal** (page 20).



To enter a **<u>Service</u>** for the household:

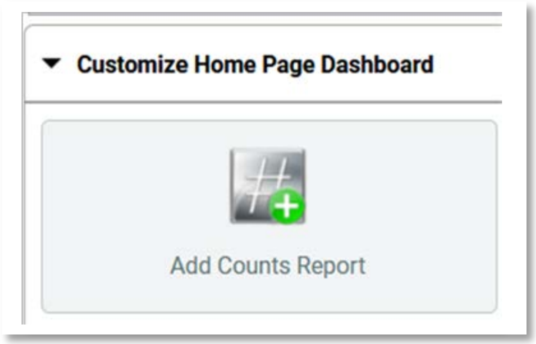
- On the head of household's **Summary** page, scroll down until the **Services** box display. Click **Add Service** or **Multiples Services** (to enter more than one service.
- To include all members, click the box to left of (638) Female Single Parent (blue arrow)
- Follow the data entry instructions for **New Single Client Workflow: Add Service** (page 22).

What if I do not want to include all members in a <u>Goal</u> and/or a <u>Service</u>?
Click the box to the left of each member's name that you want to include in a Goal or a Service.

Appendix A: Counts Report

When you log into HMIS, your **Home Page Dashboard** page displays. To add **Counts Report** to your Dashboard, scroll down until the Customize Home Page Dashboard displays:

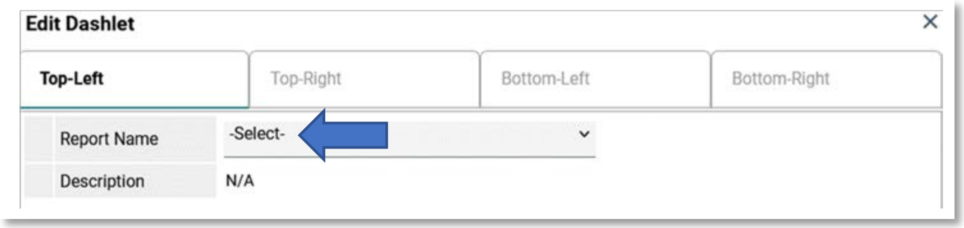
- Click the triangle to the left of Customize.
- Click **Add Counts Report**.
- Your Dashboard will refresh and the Counts Report box will display.
- Click the pencil icon (green arrow)



The **Edit Dashlet** will display, giving you the option to select up to 4 Counts reports.

For your first report, click Select (blue arrow) to display report options.

There is a list of **Program Manager** reports. For most users, scroll down until the **End User/Case Manager** reports display.



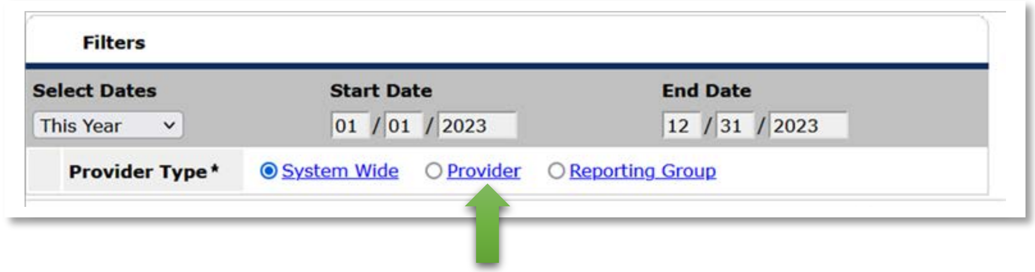
What's the difference between reports that start with <u>Clients</u> vs those that start with <u>My Clients</u>?

- Select a **My Clients** report if you want information only on clients you have tagged as their case manager.
- Select a **Clients** report if you want information on all clients in your Agency.

Appendix A: Counts Report

Depending on the report selected, Filters will display.

- **Selected Dates**: Select best match. Example: select This Year to display data for this calendar year.
- **Provider Type**: select **Provider** (green arrow). The provider you selected at “enter data as” will display.
- Click **OK**.



Up to 4 reports can be selected. To select another report:

- Click **Top-Right** (blue arrow).
- Repeat the same process as the first report, then click **OK**.
- Click **Bottom-Left** for your third report. Repeat the same process.
- Click **BottomRight** for your third report. Repeat the same process.