

SANTA MARIA/SANTA BARBARA CONTINUUM OF CARE



COUNTY of  
SANTA BARBARA

# Homeless Management Information System

October 2023

## HMIS Workflow Manual: Adding a New Client

Community Technology Alliance  
75 East Santa Clara Street • Suite 900  
San Jose, CA 95113  
[www.ctagroup.org](http://www.ctagroup.org)

# Table of Contents

2	Santa Barbara Web Portal
3	HMIS Workflow Overview
4	Access HMIS

	<b>New Single Client Workflow</b>
5	New Single Client Workflow
6	Search for Client
7	Add New Single Client
8	Add Release of Information (ROI)
9	Add Yourself as a Case Manager
10	Complete Client Demographics
12	Create a Project Entry
13	Complete Assessment
20	Optional: Add Goal
22	Optional: Add Service

	<b>New Client in a Household Workflow</b>
24	New Client in a Household Workflow
25	Search for Client
25	Search for Additional Members
26	Create Household
29	Add ROI
30	Add Yourself as a Case Manager
31	Complete Client Demographics
32	Create a Project Entry
33	Complete Assessment for each Member
34	Optional: Add Goal and Service

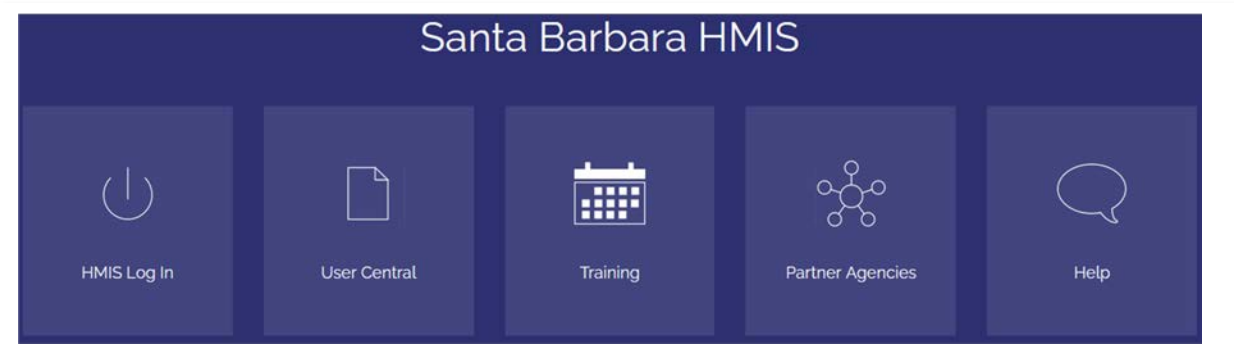
[Appendix A](#)  
Counts Report: page 35

## | 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**

A screenshot of the HMIS Help Desk ticket submission form. The form has a light gray background and contains several input fields: "Contact Name \*" (text box), "Email \*" (text box), "Phone\*" (text box), "Priority\*" (dropdown menu with "MEDIUM" selected), "Type\*" (dropdown menu with "I CAN'T LOGON" selected), and "Subject\*" (text box). Below these is a large "Description\*" text area. At the bottom, there is a small disclaimer: "When you click Submit, a new case will be automatically created for you at CTA. You will also receive an email confirmation." and a yellow "SUBMIT" button.

## HMIS Workflow Overview

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

After searching for the client and there is no match:

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

Single New Client	New Client in a Household
<ol style="list-style-type: none"> <li>1. Access HMIS and <b>Enter Data As</b> (page 5).</li> <li>2. Search for client. If not in HMIS, add client (page 6)</li> <li>3. Add <b>ROI</b> (page 8)</li> <li>4. Add yourself as a <b>Case Manager</b> (page 9).</li> <li>5. Click <b>Client Profile</b>. Enter data in <b>Client Demographics</b> (page 10).</li> <li>6. Create <b>Entry</b> (page 12)</li> <li>7. Enter data in <b>Assessment</b> (page 13)</li> <li>8. Optional: Add <b>Goals</b> (page 20).</li> <li>9. Optional: Add <b>Services</b> (page 22).</li> </ol>	<ol style="list-style-type: none"> <li>1. Access HMIS. Select your project from <b>Enter Data As</b>.</li> <li>2. Search for client who is head of household. Add in not in HMIS.</li> <li>3. Search for each additional household member. Add member if not already in HMIS</li> <li>4. Return to head of household. Create household.</li> <li>5. Add ROI.</li> <li>6. Add yourself as a Case Manager.</li> <li>7. Click <b>Client Profile</b>. Enter data in <b>Client Demographics</b>.</li> <li>8. Create <b>Entry</b>.</li> <li>9. Enter data in <b>Assessment</b></li> <li>10. Click on each household member and complete their <b>Assessment</b>.</li> <li>11. Optional: Add <b>Goals</b>.</li> <li>12. Optional: Add <b>Services</b>.</li> </ol>

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.

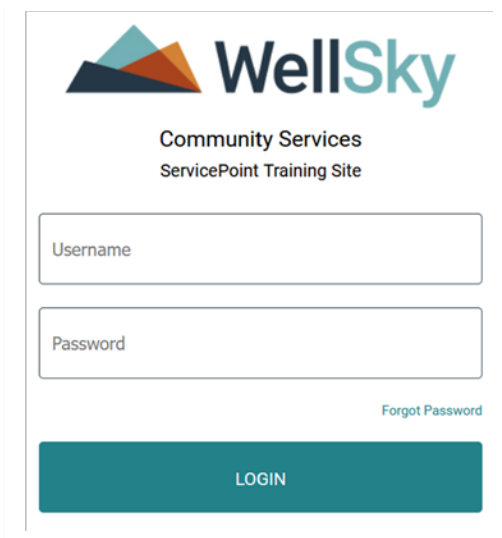
## | Access HMIS

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**.

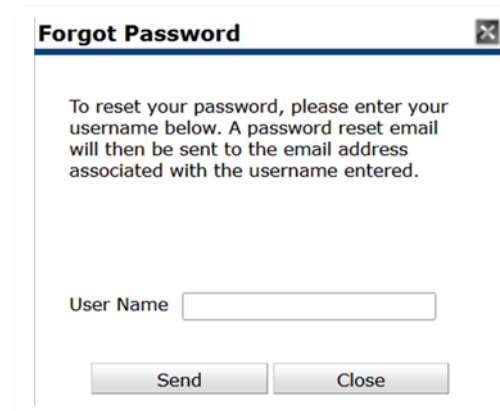


The login form for WellSky Community Services ServicePoint Training Site. It features the WellSky logo at the top, followed by the text "Community Services" and "ServicePoint Training Site". Below this are two input fields: "Username" and "Password". To the right of the Password field is a link that says "Forgot Password". At the bottom is a large teal button labeled "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.



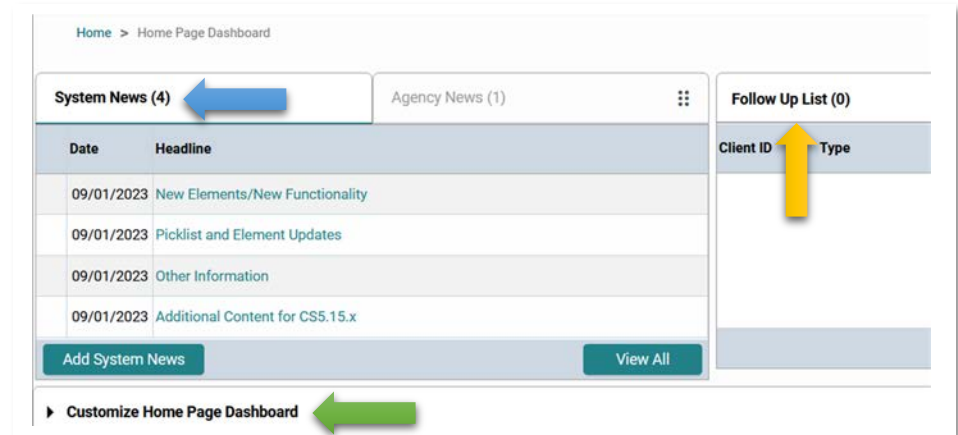
A dialog box titled "Forgot Password" with a close button in the top right corner. The text inside reads: "To reset your password, please enter your username below. A password reset email will then be sent to the email address associated with the username entered." Below this text is a label "User Name" followed by an input field. At the bottom are two buttons: "Send" and "Close".

## | 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): **Go to Appendix A** 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.

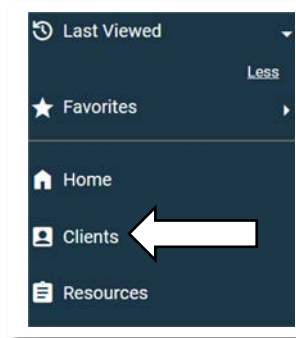


## New Client Workflow

### 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.

**Client Search**

Please Search the System before adding a New Client.

Items in Italics are for Data Entry ONLY and will not be used for Search Results.

Name	First	Middle	Last	Suffix
Name Data Quality	-Select-			
Alias				
Social Security Number				
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Date of Birth				
DOB Data Quality	-Select-			
Primary Race	-Select-			
Secondary Race	-Select-			
Ethnicity	-Select-			

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

**Client Results**

ID	Name ▲	Social Security Number	Date of Birth
No matches.			

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.

Name	First Test	Middle	Last Client	Suffix
Name Data Quality	-Select-		Date of Birth	/ /   
Alias			DOB Data Quality	-Select-
Social Security Number			Primary Race	-Select-
Social Security Number Data Quality	-Select-		Secondary Race	-Select-
U.S. Military Veteran?	-Select-		Ethnicity	-Select-
Gender	<div>             Woman (Girl, if child)              Man (Boy, if child)              Culturally Specific Identity (e.g., Two-Spirit)              Different Identity              Non-Binary              Transgender              Questioning              Client doesn't know              Client prefers not to answer              Data not collected           </div> <div>Clear All</div>			

Enter data for Date of Birth, DOB Data Quality

Note: The HMIS vendor (WellSky) is showing Race and Ethnicity as 2 separate data fields. This is incorrect. Race & Ethnicity is now one data field.

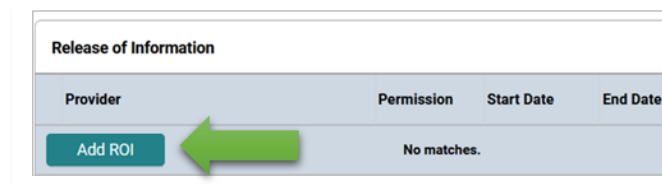


## | New Single Client Workflow: Add ROI

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)

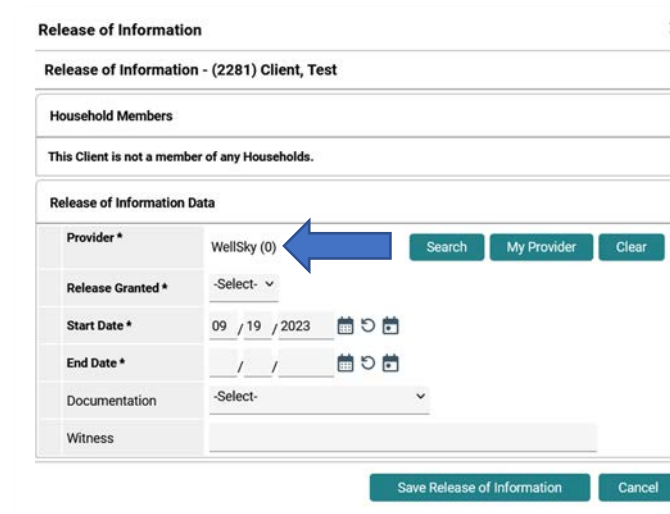


Provider	Permission	Start Date	End Date
No matches.			

**Add ROI**

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**.



**Release of Information**

Release of Information - (2281) Client, Test

**Household Members**

This Client is not a member of any Households.

**Release of Information Data**

Provider *	WellSky (0)	<b>Search</b>	<b>My Provider</b>	<b>Clear</b>
Release Granted *	-Select-			
Start Date *	09 / 19 / 2023			
End Date *	/ /			
Documentation	-Select-			
Witness				

**Save Release of Information** **Cancel**

## | New Single Client Workflow: Case Manager

**Step 4: Add yourself as a case manager.** This step is optional.

- 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**.

Case Manager

Case Manager - (2281) Client, Test

Household Members

This Client is not a member of any Households.

Type \*

☒ Community Services User
 ☐ Me
 ☐ Other

Select User \*

WellSky (0)

Search

My Provider

Clear

-Select-

Name \*

Title

Phone Number

Email Address

Provider \*

WellSky (0)

Search

My Provider

Clear

Start Date \*

09 / 19 / 2023

📅

🔄

📅

End Date

/ / 

📅

🔄

📅

Add Case Manager

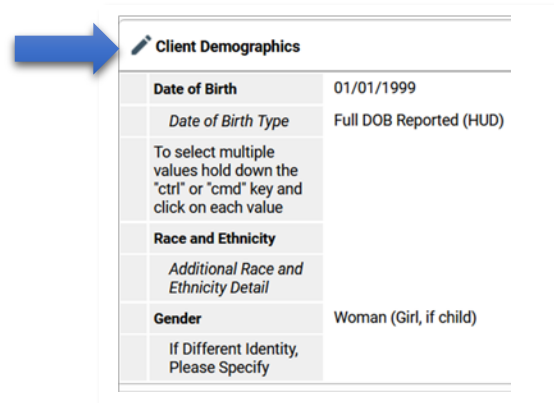
Cancel

## | New Single Client Workflow: Complete Client Demographics

### Step 5

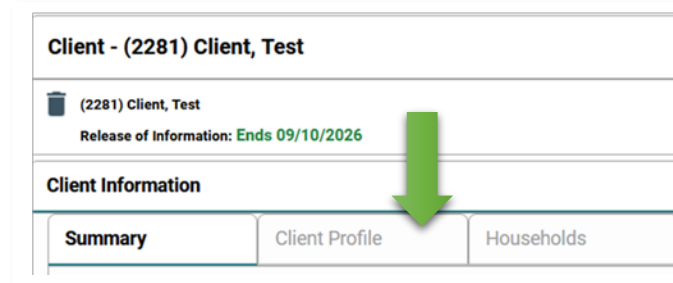
Scroll to the top of the page until you see the **Client Profile** tab:

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



**Client Demographics**

<b>Date of Birth</b>	01/01/1999
<i>Date of Birth Type</i>	Full DOB Reported (HUD)
To select multiple values hold down the "ctrl" or "cmd" key and click on each value	
<b>Race and Ethnicity</b>	
<i>Additional Race and Ethnicity Detail</i>	
<b>Gender</b>	Woman (Girl, if child)
<i>If Different Identity, Please Specify</i>	



**Client - (2281) Client, Test**

(2281) Client, Test  
Release of Information: Ends 09/10/2026

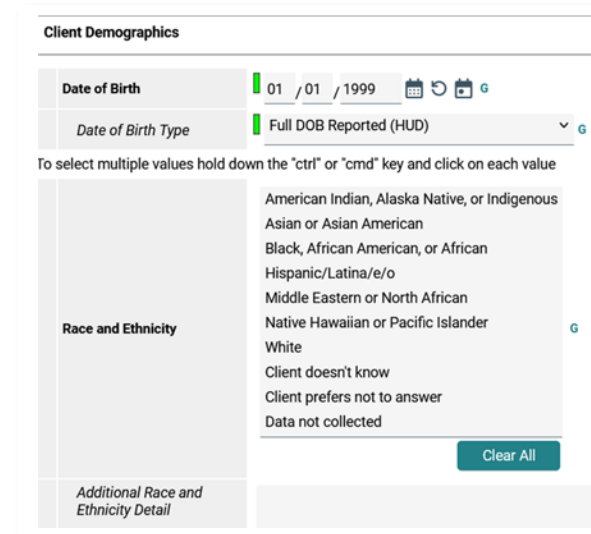
**Client Information**

<b>Summary</b>	Client Profile	Households
----------------	----------------	------------

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.



**Client Demographics**

<b>Date of Birth</b>	01 / 01 / 1999
<i>Date of Birth Type</i>	Full DOB Reported (HUD)
To select multiple values hold down the "ctrl" or "cmd" key and click on each value	
<b>Race and Ethnicity</b>	<ul style="list-style-type: none"> <li>American Indian, Alaska Native, or Indigenous</li> <li>Asian or Asian American</li> <li>Black, African American, or African</li> <li>Hispanic/Latina/e/o</li> <li>Middle Eastern or North African</li> <li>Native Hawaiian or Pacific Islander</li> <li>White</li> <li>Client doesn't know</li> <li>Client prefers not to answer</li> <li>Data not collected</li> </ul>
<i>Additional Race and Ethnicity Detail</i>	

Clear All

## | 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**.

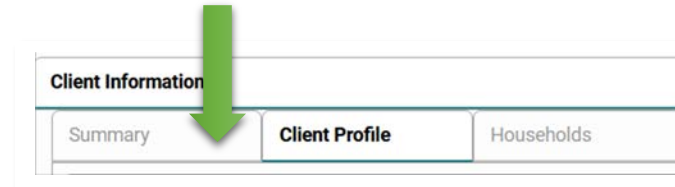
The screenshot shows a software interface for selecting gender. On the left is a large, empty grey box labeled "Gender". To its right is a dropdown menu with the following options: "Woman (Girl, if child)", "Man (Boy, if child)", "Culturally Specific Identity (e.g., Two-Spirit)", "Different Identity", "Non-Binary", "Transgender", "Questioning", "Client doesn't know", "Client prefers not to answer", and "Data not collected". The "Different Identity" option is currently selected. Below the dropdown is a teal button labeled "Clear All". At the bottom left, there is a text input field labeled "If Different Identity, Please Specify" with a small teal "G" icon to its right. At the bottom right are two teal buttons: "Save" and "Cancel".

## | 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: SSVF selects VA for Type.**
- **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.

**Project Start Data - (2281) Client, Test**

---

**Household Members**

This Client is not a member of any Households.

---

**Project Start Data - (2281) Client, Test**

<b>Provider *</b>	WellSky (0)	<b>Search</b>	<b>My Provider</b>	<b>Clear</b>
<b>Type *</b>	-Select-			
<b>Project Start Date *</b>	09 / 20 / 2023			

## | 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.

**Any data fields in bold with a \* must be answered in order to create the project entry.**

The screenshot shows a portion of the HMIS Assessment form. A green arrow points to the 'Date of Birth' field, which displays '01 / 01 / 1999'. Below it, the 'Date of Birth Type' is set to 'Full DOB Reported (HUD)'. An orange arrow points to the 'Race and Ethnicity' dropdown menu, which is open and shows a list of options including 'American Indian, Alaska Native, or Indigenous', 'Asian or Asian American', 'Black, African American, or African', 'Hispanic/Latina/e/o', 'Middle Eastern or North African', 'Native Hawaiian or Pacific Islander', 'White', 'Client doesn't know', 'Client prefers not to answer', and 'Data not collected'. A blue arrow points to the 'Gender' dropdown menu, which is also open and shows options like 'Woman (Girl, if child)', 'Man (Boy, if child)', 'Culturally Specific Identity (e.g., Two-Spirit)', 'Different Identity', 'Non-Binary', 'Transgender', and 'Questioning'. The 'Woman (Girl, if child)' option is highlighted in grey.

**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.

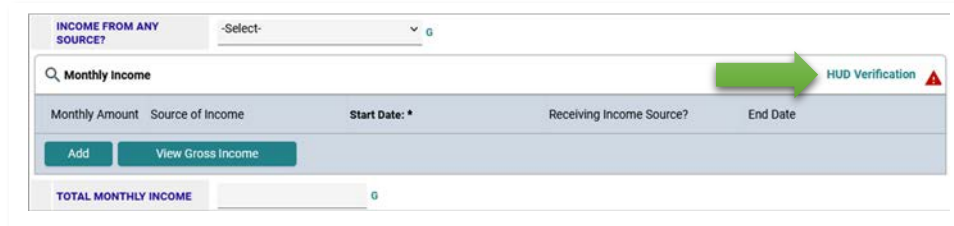
The screenshot shows the bottom section of the HMIS Assessment form. It contains four fields, each with a dropdown menu: 'DISABLING CONDITIONS?' (set to '-Select-'), 'Relationship to Head of Household' (marked with an asterisk and set to '-Select-'), 'Enrollment CoC' (marked with an asterisk and set to '-Select-'), and 'PRIOR LIVING SITUATION?' (set to '-Select-').

## 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**.

### Monthly Income

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



INCOME FROM ANY SOURCE? -Select- G

Monthly Income

Monthly Amount Source of Income Start Date: \* Receiving Income Source? End Date

Add View Gross Income

TOTAL MONTHLY INCOME G

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

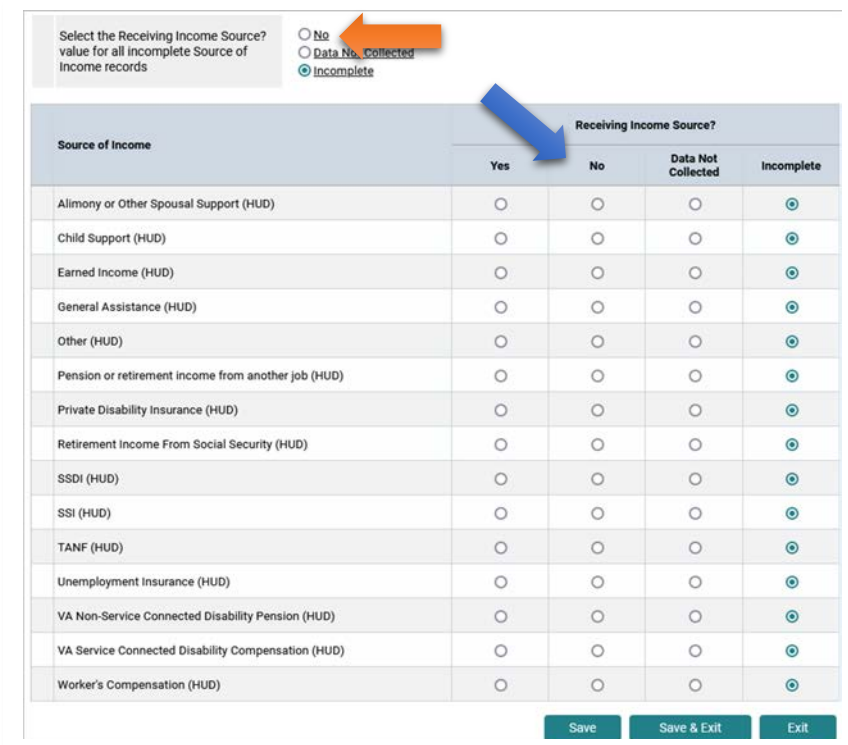
All the boxes in the **No** column (blue arrow) will turn blue.

If you entered **No** for **Income from any source?**

- Click **Save & Exit**.

**Did you answer Yes for Income from any source?**

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



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 type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
SSI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
TANF (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Save Save & Exit Exit

## | 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 arrow)
- The **Add Recordset** pop-up will display.

Source of Income	Receiving Income	
	Yes	No
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input checked="" type="radio"/>

**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:

**HUD Verification**

**Add Recordset** ✕

---

**Monthly Income**

Monthly Amount	<input type="text" value=""/>
Source of Income	Earned Income (HUD)
If Other, Please Specify	<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>
Start Date: *	09 / 20 / 2023
Receiving Income Source?	Yes
End Date	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>

Save
Cancel



## | New Single Client Workflow: Create Project Entry

### Non-Cash Benefits

- **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 **No** selected for Non-Cash Benefits from any Source?  
Click **Save & Exit**.

If **Yes** 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:



**HUD Verification: Non-Cash Benefits for 09/20/2023**

Per Source of Non-Cash Benefit, the current records for Non-Cash Benefits as of 09/20/2023 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 09/20/2023, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Benefit? value for all incomplete Source of Non-Cash Benefit records

☐ Yes  
☐ No  
☐ Data Not Collected  
☒ Incomplete

Source of Non-Cash Benefit	Receiving Benefit?			
	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 type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
TANF Child Care Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
TANF Transportation Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other TANF-Funded Services (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other Source (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Save Save & Exit Exit

## | New Single Client Workflow: Create Project Entry

### Health Insurance

- **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 **No** selected for Covered by Health Insurance? Click **Save & Exit**.

If **Yes** 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:



Per Health Insurance Type, the current records for Health Insurance Types as of 09/20/2023 are displayed below. Any previous records for Health Insurance Types not overlapping as of this date are not displayed. In the event that multiple records exist per Health Insurance Type as of 09/20/2023, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Covered? value for all incomplete Health Insurance Type records

☐ Yes  
☐ No  
☐ Data Not Collected  
☒ Incomplete

Health Insurance Type	Covered?			
	Yes	No	Data Not Collected	Incomplete
MEDICAID	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
MEDICARE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Veteran's Health Administration (VHA)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
State Children's Health Insurance Program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Employer - Provided Health Insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Health Insurance obtained through COBRA	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Private Pay Health Insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
State Health Insurance for Adults	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Indian Health Services Program	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

## 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.

Per Disability Type, the current records for Disability Types as of 09/20/2023 are displayed below. Any previous records for Disability Types not overlapping as of this date are not displayed. In the event that multiple records exist per Disability Type as of 09/20/2023, 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 prefers not to answer (HUD)  
☐ Data not collected (HUD)  
☒ Incomplete

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

Save Save & Exit Exit

- The **Add Recordset** pop-up will display
- 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:

HUD Verification ☒

**Add Recordset**

**Disability Types**

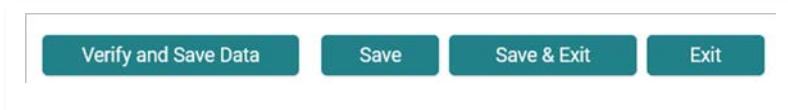
Disability Type	Alcohol Use Disorder (HUD)
Disability determination	Yes (HUD)
If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	-Select- G
Note on Disability	G
Above condition is going to be long term? (Retired)	-Select- G
Start Date *	09 / 20 / 2023 G
End Date	/ / G

Save Cancel

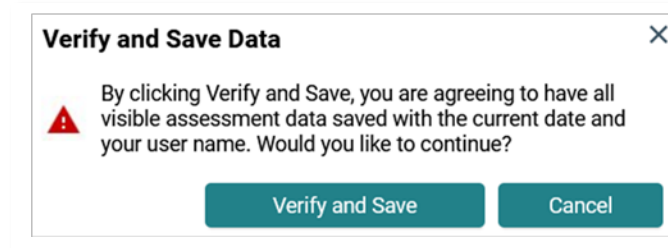
## | New Single Client Workflow: Create Project Entry

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.

**Goal**

Goal - (2281) Client, Test

▼ Household Members

This Client is not a member of any Households.

Provider \* WellSky (0) Search My Provider Clear

Case Manager -Select-

Date Goal was Set \* 09 / 21 / 2023

Classification \* -Select-

Type \* -Select-

Goal Description

Target Date / /

Overall Status \* -Select-

If Closed, Outcome -Select-

If Partially Complete, Percent Complete -Select-

Projected Follow Up Date / /

Follow Up User WellSky (0) Search My Provider Clear

Follow Up Made -Select-

Completed Follow Up Date / /

Outcome at Follow Up -Select-

Add Goal Cancel

## 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**.

Goal

Goal - (2281) Client, Test

Household Members

This Client is not a member of any Households.

Provider \*

WellSky (0)

Search My Provider Clear

Case Manager

-Select-

Date Goal was Set \*

09 / 21 / 2023

Classification \*

-Select-

Type \*

-Select-

Goal Description

Target Date

/ /

Overall Status \*

-Select-

If Closed, Outcome

-Select-

If Partially Complete, Percent Complete

-Select-

Projected Follow Up Date

/ /

Follow Up User

WellSky (0)

Search My Provider Clear

Follow Up Made

-Select-

Completed Follow Up Date

/ /

Outcome at Follow Up

-Select-

Add Goal

Cancel

## | 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**.

Client - (2281) Client, Test

Mass Visibility Update

(2281) Client, Test

Release of Information: Ends 09/10/2026

Client Information

Service Transactions

Add Service

Household Members

This Client is not a member of any Households.

Service Provider *	WellSky (0)	Search	My Provider	Clear
Creating User	Bob Russell			
Start Date *	09 / 21 / 2023	8 : 00 : 58 AM		
End Date	09 / 21 / 2023	8 : 00 : 58 AM		
Service Type *	-Select-	Look Up		
Provider Specific Service	-Select-			

Save & Continue

Cancel

## | New Single Client Workflow: Services

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

**If you are a SSVF provider**, 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.

Type of SSVF Service	-Select- ▼
SSVF Financial Assistance Type	-Select- ▼
SSVF Financial Assistance Amount	\$ <input type="text"/>

**If you want to add support documentation:**

- 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**

**Support Documentation**

Date Added ▼	Name
<input type="button" value="Add Support Documentation"/>	

**To complete Need Information**

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

**Need Information**

Need Status *	Identified ▼
Outcome of Need	-Select- ▼
If Need is Not Met, Reason	-Select- ▼

Click **Save & Exit** when done.



## | New Client in a Household Workflow

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.

### 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.

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 New Single Client Workflow 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

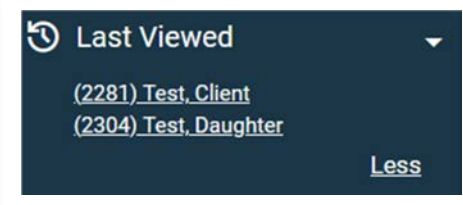
- Start by searching for the Head of Household (HoH)
- Add the HoH to HMIS.
- Search for the next member of the household.
- Add that member to HMIS.
- Repeat the process until all members added.
- Create the household immediately after adding all members to HMIS.

## | 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).

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.

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.

- 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**.

### Add New Household

**Household Type**

Household Type \*
 -Select-

**Client Search**

Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID # 2304

Submit

## New Client in a Household Workflow: Create Household

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

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

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

Click **Continue**.

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

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

Since **Test, Daughter** is the child (orange arrow), change:

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

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

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

Household Information - (638) Female Single Parent

(638) Female Single Parent

Save Save & Exit Exit

Household Type \*

Female Single Parent

Income

US\$500.00

Client Count

2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(2281) Test, Client	24	No	-Select-	09 / 23 / 2023	0	1
(2304) Test, Daughter	4	No	-Select-	09 / 23 / 2023	0	1

Add/Delete Household Members

Household History Report

## | 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**.

Review Household Data

It is strongly recommended to review the fields for Head of Household, Relationship to Head of Household, and Household Type for all Clients to ensure the information is correct.

Would you like to review this data now?

Yes

No

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

Households			
ID	Type	Head of Household	Relationship
638	Female Single Parent		
	*Test, Client	Yes	Self
	Test, Daughter	No	Daughter
Search Existing Households		Start New Household	

## | 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).



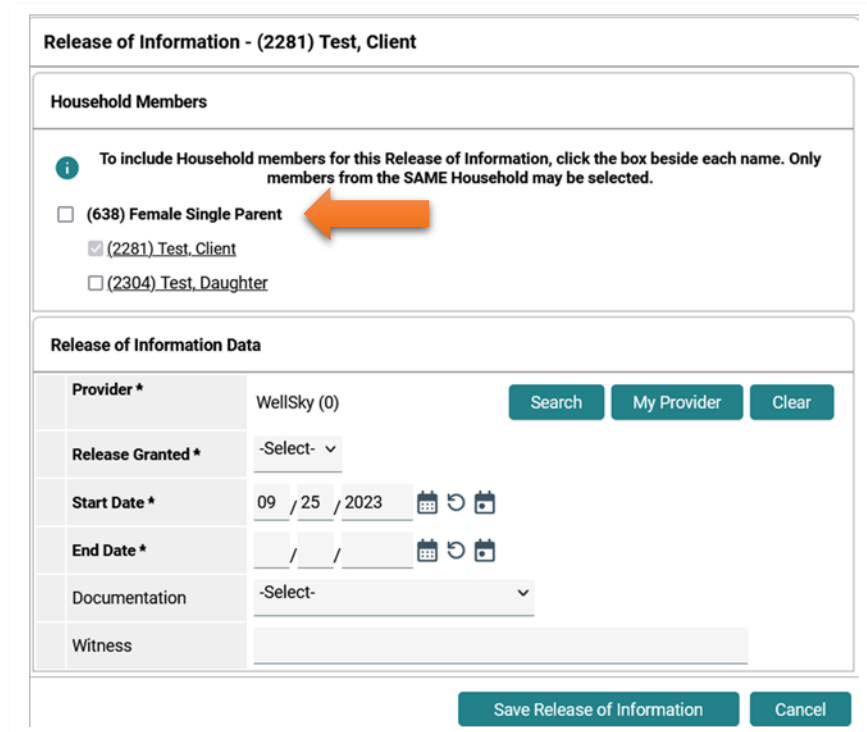
The screenshot shows a box titled "Release of Information". It has a header with "Provider" and "Permission". Below the header, there is a green button labeled "Add ROI" and a status message "No matches." A green arrow points to the "Add ROI" button.

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.



The screenshot shows a form titled "Release of Information - (2281) Test, Client". It has two main sections: "Household Members" and "Release of Information Data".

**Household Members**

To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.

- ☐ (638) Female Single Parent
- ☒ (2281) Test, Client
- ☐ (2304) Test, Daughter

**Release of Information Data**

Provider \* WellSky (0) Search My Provider Clear

Release Granted \* -Select- v

Start Date \* 09 / 25 / 2023 [calendar icon] [refresh icon] [done icon]

End Date \* / / [calendar icon] [refresh icon] [done icon]

Documentation -Select- v

Witness

Save Release of Information Cancel

## | 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.

Case Manager - (2281) Test, Client

Household Members

To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.

☐

(638) Female Single Parent

☒

(2281) Test, Client

☐

(2304) Test, Daughter

Type \*

Community Services User ☒ Me ☐ Other ☐

Select User \*

WellSky (0)

Search

My Provider

Clear

-Select-

Name \*

Title

Phone Number

Email Address

Provider \*

WellSky (0)

Search

My Provider

Clear

Start Date \*

09 / 25 / 2023

End Date

/ /

Add Case Manager

Cancel

## | 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.

Households		
ID	Type	
 638	Female Single Parent	
	*Test, Client	
	Test, Daughter	

Client Information

Summary

Client Profile

Client Record

Name	Test, Client
Name Data Quality	Full Name Reported
Alias	
Social Security	-1234
SSN Data Quality	Approximate or partial S
U.S. Military Veteran?	No (HUD)
Client ID	2281
Age	24

Client Demographics

Date of Birth	01/01/1999
---------------	------------



## | New Client in a Household Workflow: Complete Project Entry

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

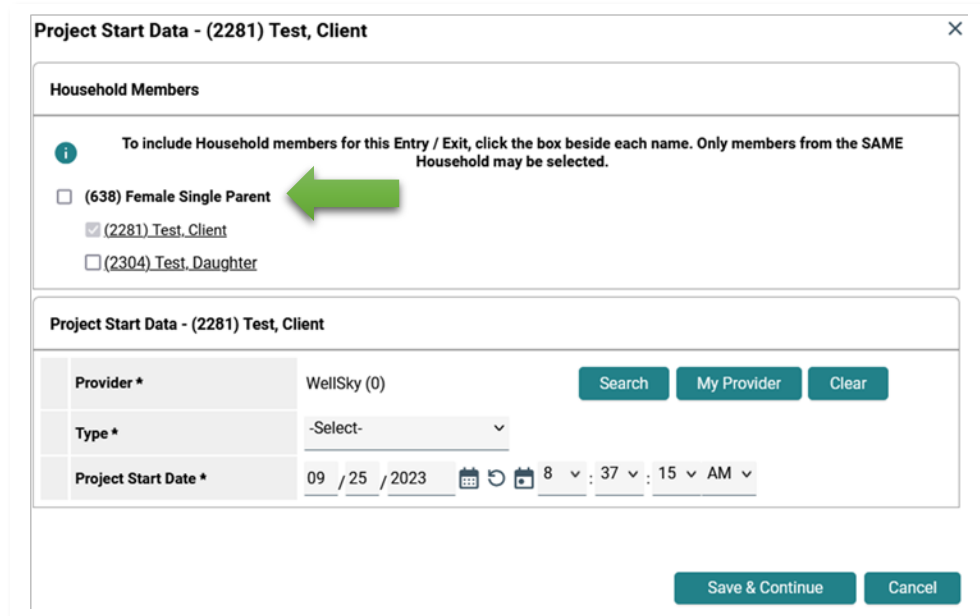
**Best practice: Create the project entry from the head of household's Summary page.**

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.



**Project Start Data - (2281) Test, Client**

**Household Members**

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

☐ (638) Female Single Parent

☒ (2281) Test, Client

☐ (2304) Test, Daughter

**Project Start Data - (2281) Test, Client**

Provider \* WellSky (0) Search My Provider Clear

Type \* -Select- ▼

Project Start Date \* 09 / 25 / 2023 📅 🕒 8 : 37 : 15 AM 🕒

Save & Continue Cancel

## | 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.

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

### **For every child (minor) in the household:**

- 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

**Why do this?** 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**.

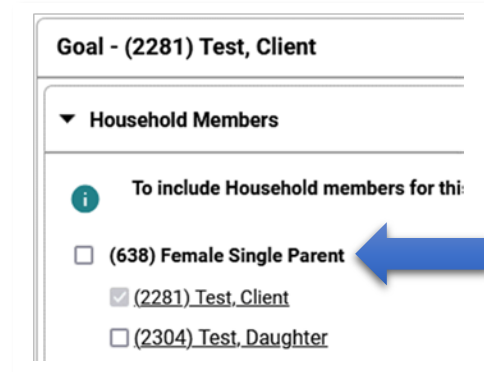
Complete this process for any other children in the household.

## | 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).



The screenshot shows a form titled "Goal - (2281) Test, Client". Below the title is a section labeled "Household Members" with a dropdown arrow. Under this section, there is an information icon (i) and the text "To include Household members for thi:". Below this, there are three rows of checkboxes and names:   
1. ☐ (638) Female Single Parent (A blue arrow points to this checkbox.)   
2. ☒ (2281) Test, Client   
3. ☐ (2304) Test, Daughter

To enter a **Service** 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).

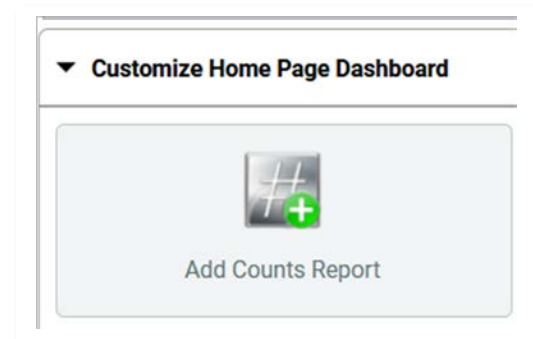
### **What if I do not want to include all members in a Goal and/or a Service?**

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.

Edit Dashlet	
Top-Left	Top-Right
Bottom-Left	Bottom-Right
Report Name	-Select-
Description	N/A

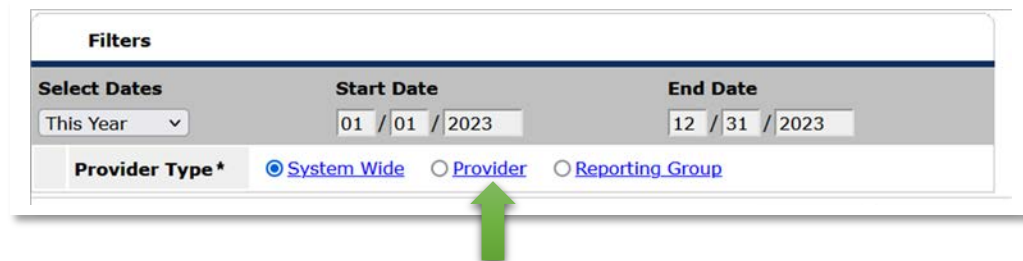
**What's the difference between reports that start with Clients vs those that start with My Clients?**

- 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**.



Filters		
<b>Select Dates</b>	<b>Start Date</b>	<b>End Date</b>
This Year ▾	01 / 01 / 2023	12 / 31 / 2023
<b>Provider Type *</b>	<input checked="" type="radio"/> System Wide <input type="radio"/> Provider <input type="radio"/> Reporting Group	

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.



Edit Dashlet	
Top-Left	Top-Right ←
Bottom-Left	Bottom-Right
Report Name	-Select- ▾
Description	N/A

