MERCED COUNTY CONTINUUM OF CARE

Homeless Management Information System

October 2023

HMIS Workflow Manual

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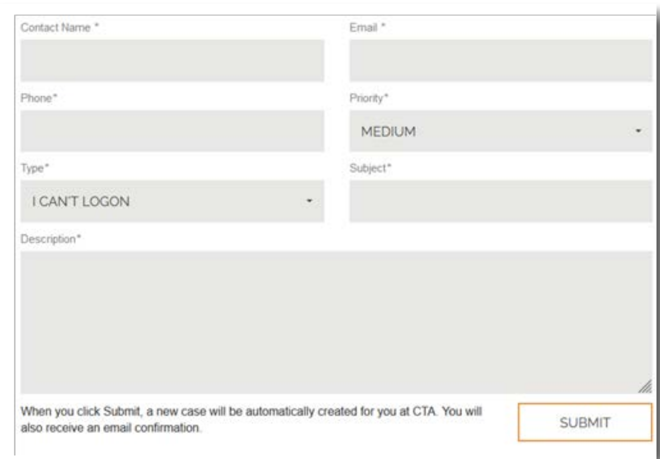
Table of Contents

Merced HMIS Web Portal

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

- **Client is not in HMIS:** Follow workflow for **New Client**, starting on page 5.
- **Client is in HMIS:** Follow workflow for **Existing Client**, starting on page 16.

After searching for the client:

New Client (client is not in HMIS)	Existing Client
1. Click Add Client. **2.** **Create A New Client** page displays. **3.** Enter **Release of Information** data. **4.** Enter new client data. **5.** Enrolling Household Members? Click **Manage** to add members. **6.** Optional: Add yourself as a Care **Team Member.** **7.** Click client's **Program**s tab. **8.** Click on the program you want to enroll your client. **9.** Click **Enroll.** **10.** Answer any program specific questions. **11.** Click **Save & Close.** **12.** **Need to access client's enrollment, history, assessments, notes, files, chart?** Click on program listed under **Active Programs.**	**1.** Click on client's name**.** **2.** Review profile data. Update if needed**.** **3.** Client enrolled in your program? Click on program listed under Active Programs to access client's enrollment, history, assessments, notes, files, chart**.** **4.** **Client not enrolled in your program?** Follow **New Client workflow**, beginning with #7 (Click client's Programs tab)**.**

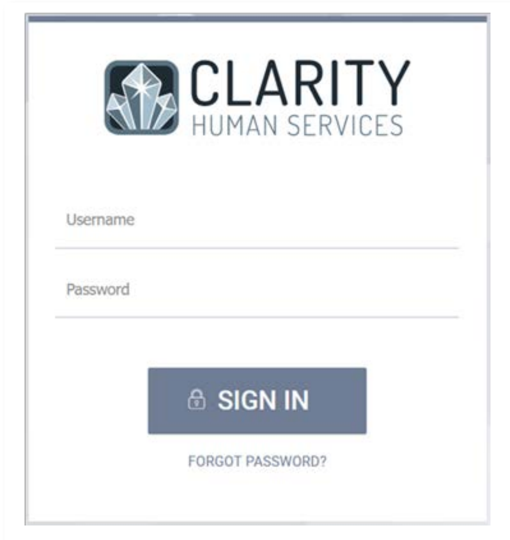
If new client is in a household. Add the new client. Then search for each member. Add any member not already in HMIS. Then access the profile of the client who is the head of household.

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

Greater detail and screenshots of **Existing Client workflow** begins on page 16.

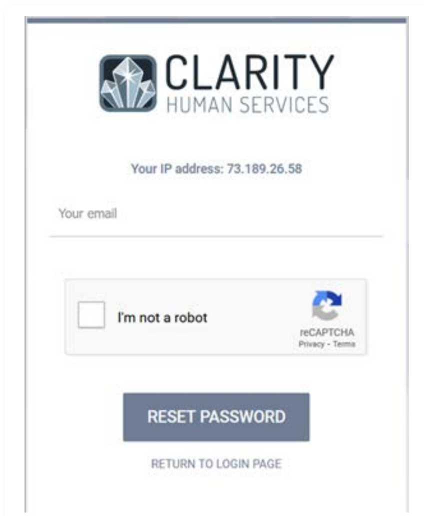
Access HMIS

Link to HMIS site: https://merced.clarityhs.com/login



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

Click **Sign In**.

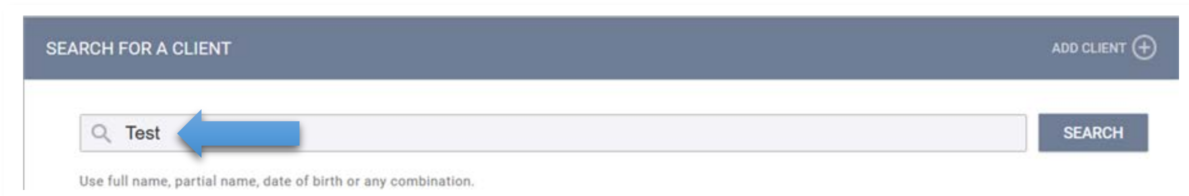


Forgot Password?

- Click **Forgot Password?**
- Enter in your email address.
- Click **I'm not a robot box.**
- Click **Reset Password.**

New 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).

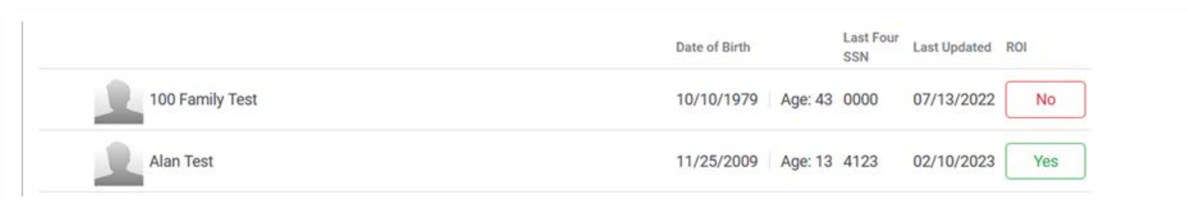


In the Search bar (blue arrow) type in the first name, last name, date of birth, social security number, or any combination of these.

In this example, “Test” was entered as the last name.

Click **Search.**

If there are any possible matches, matches will appear.



Possible matches list the client’s name, date of birth, last 4 SSN, last updated, and ROI.

- What does a **red No** under ROI mean? There is no ROI (Release of Information) or the ROI has expired.
- A **green Yes** means a current ROI has been added for the client.

Is your client in HMIS?

- **No.** Then you will need to add the client. See next page for details.
- **Yes.** The client is in HMIS. Go to **Existing Client Workflow, starting on page 16.**

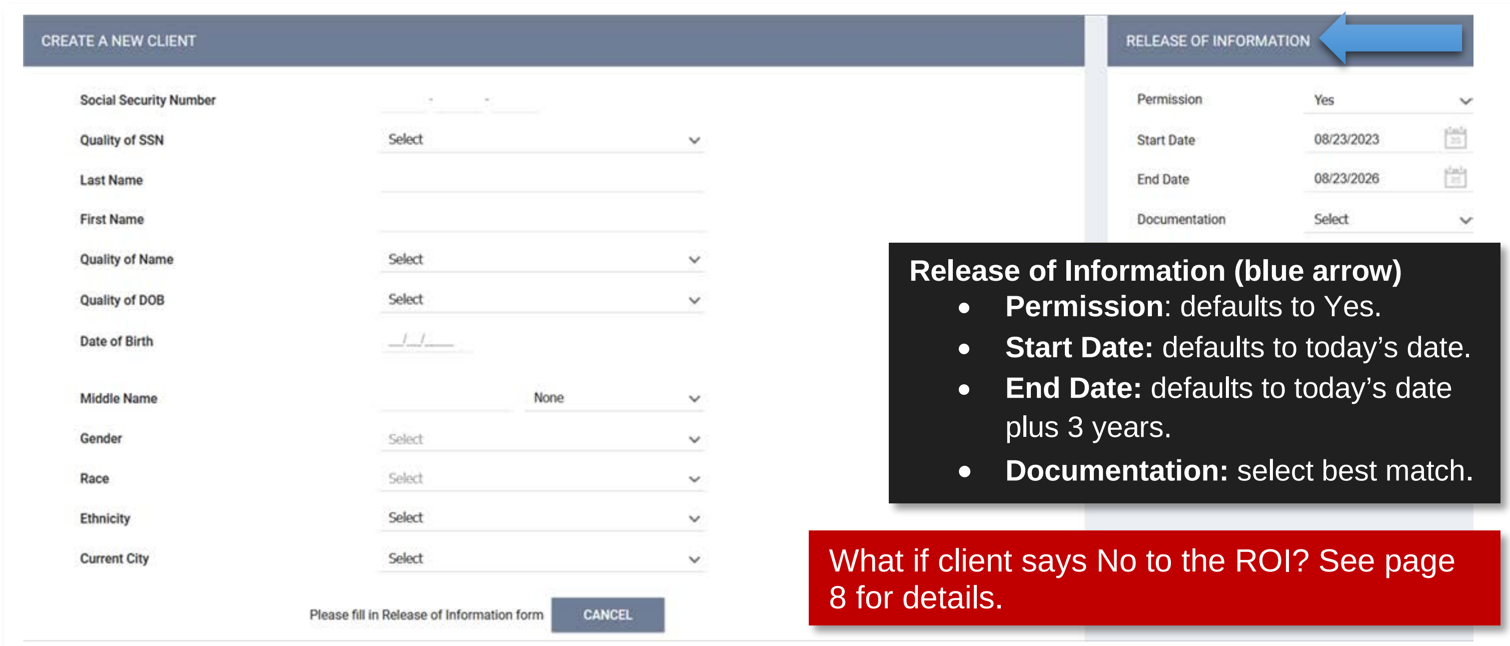
New Client Workflow: Add New Client

If your client is not in HMIS, then click Add Client (yellow arrow) located on the right side of the Search bar.

Create a New Client page appears.

Enter **Social Security Number** & other requested data.

Enter **Release of Information**

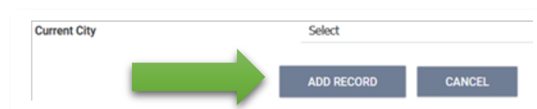


Release of Information (blue arrow)

- **Permission**: defaults to Yes.
- **Start Date:** defaults to today's date.
- **End Date:** defaults to today's date plus 3 years.
- **Documentation:** select best match.

What if client says No to the ROI? See page 8 for details.

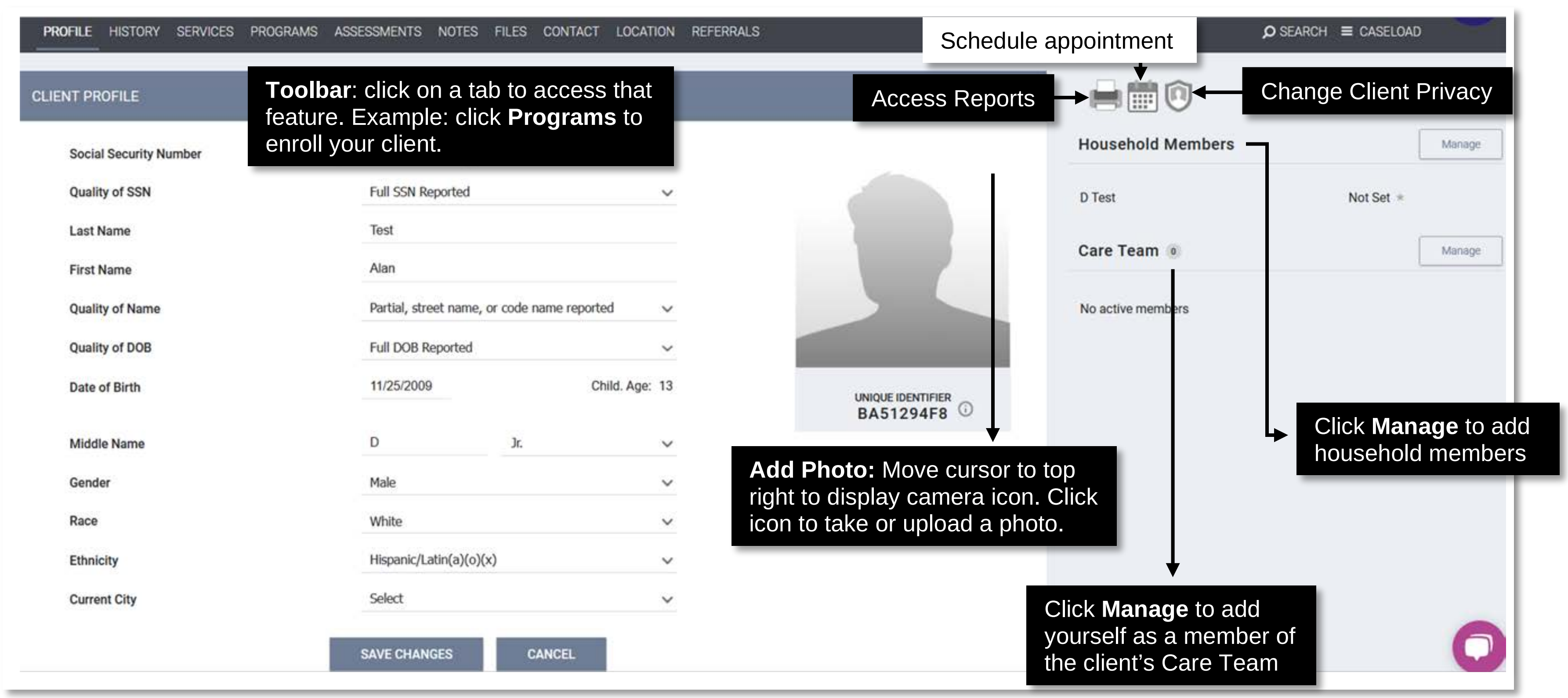
Once ROI is entered, Add Record displays under Current City (green arrow). Click **Add Record**.



New Client Workflow: Client Profile

After clicking **Add Record**, the client's **Profile** page displays.

Toolbar



Click **Save Changes** when finished.

New Client Workflow: Client Privacy

The data you enter on a client is default open. Meaning, other agencies can see the data. Sometimes a client will request their data not be shared with other agencies. If this is the client's request, you set the Permission to No when entering their ROI (Release of Information).

You can also make one or more sections of the client record private, leaving the other components of client file open.

• Assessments	• Files	• Program Enrollments
• Contact Records	• Location Records	• Referral
• Coordinated Entry Events	• Notes	• Service Items

When you make the client record or any of the above components private, only staff members at your agency will be able to see the information.

Change Client Record to Private

- Click security icon (green arrow)
- The client's Privacy page will display
- Click Private (blue arrow)
- Click **Save Changes**

Can't see Privacy Icon?
Your access rights do not include Privacy.

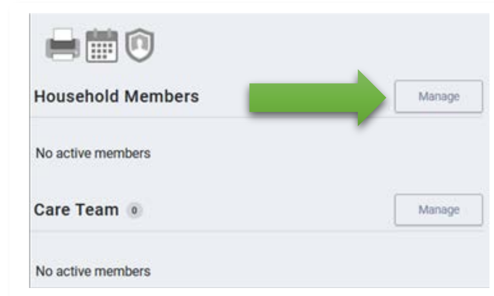
<u>NOTE</u>
<u>The client's record cannot be set to Private if their data (including services) is already being shared by two or more agencies</u>.

Make Location, Contact, Notes, Files, Service Items, and Referrals Private
When you entering or entering data in any of these components, you will see: Click on the white circle to move it and turn it blue. Blue means the information is now private.

New Client Workflow: Adding Household Members

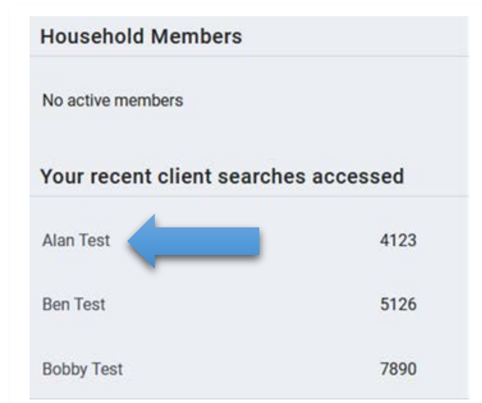
Before creating a household, make sure each household member is in HMIS**.** If a member is not in HMIS, add that member by creating their client profile.

Is your client single? Proceed to Programs (page 12).



IRecommendation: Determine who is the head of household. Create the household from their profile page.

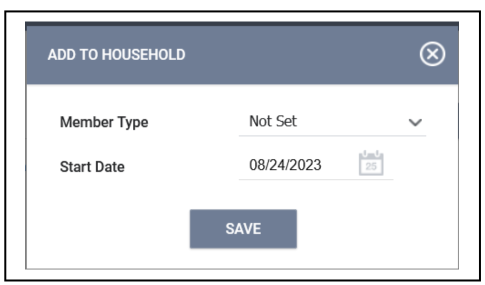
In the head of household's profile, click **Manage** for **Household Members** (green arrow). The **Household Management** page will display.



Your recent searches (including adding new clients to HMIS) will display under **Your recent client searches accessed**.

Is the household member listed? If yes, place your cursor on the client's name. A **+** sign will appear to the right. Click on the **+** sign.

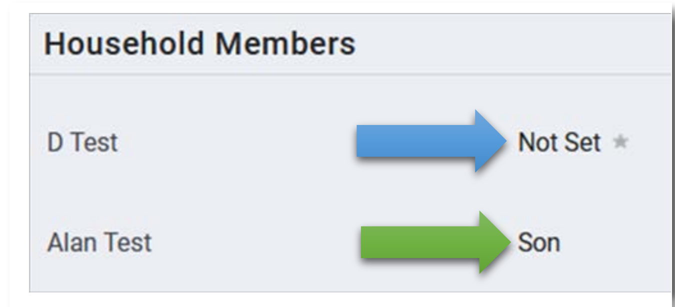
In this example, Alan Test (blue arrow is a household member). Place your cursor on Alan's name, look to the right, and click on the **+** sign.



Add To Household will pop-up.

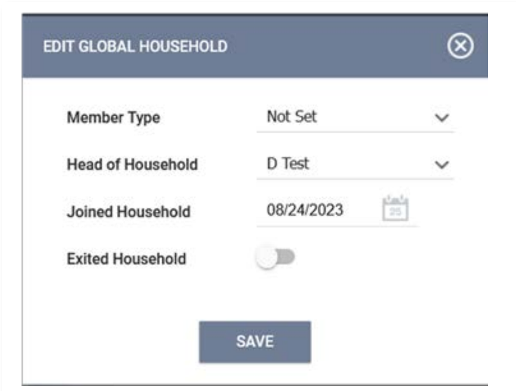
Member Type: select best match. In this example, Son will be selected.
Start Date: defaults to today's date. Change if needed.
Click **Save**

New Client Workflow: Adding Household Members



You will be returned to the **Household Management** page.

- Alan Test display as Son (green arrow)
- D Test displays as Not Set (blue arrow)
- Place your cursor on **Not Set**. A pencil icon will appear to the right.
- Click on the pencil icon. Edit Global Household pop-ups.



Member Type: select best match. In this example: D Test is the father.

Head of Household: since we started creating the household from D Test's Profile, D Test defaults to the head of household.

Joined Household: defaults to today's date. Change if needed.

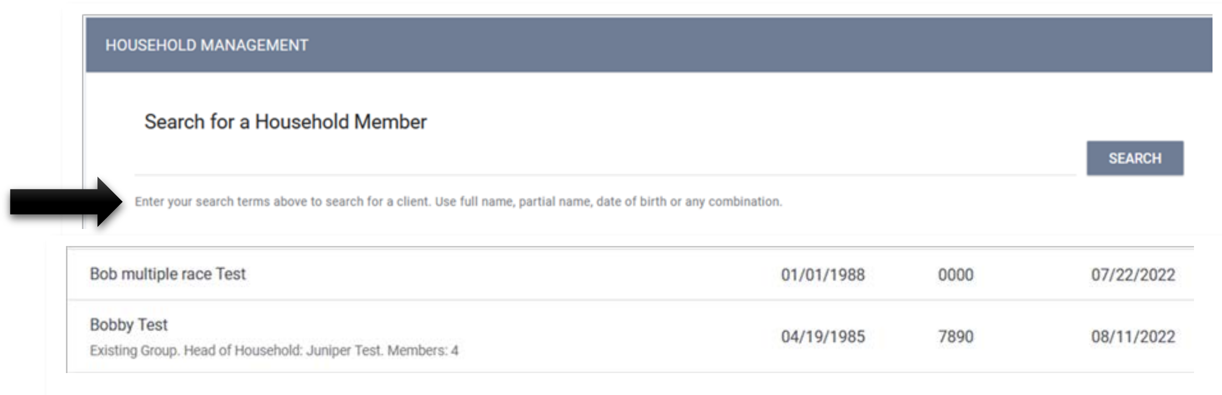
Click **Save**

Need to add more household members? Repeat for adding a household member.

One or more members not listed under Your recent client searches accessed? See next page for details.

New Client Workflow: Adding Household Members

If one or more members are not listed under recent searches, you will need to search for the client. On the **Household Management** page, enter the name of the client in the search field (black arrow).



Enter name (black arrow), then click **Search**. Search results will display.

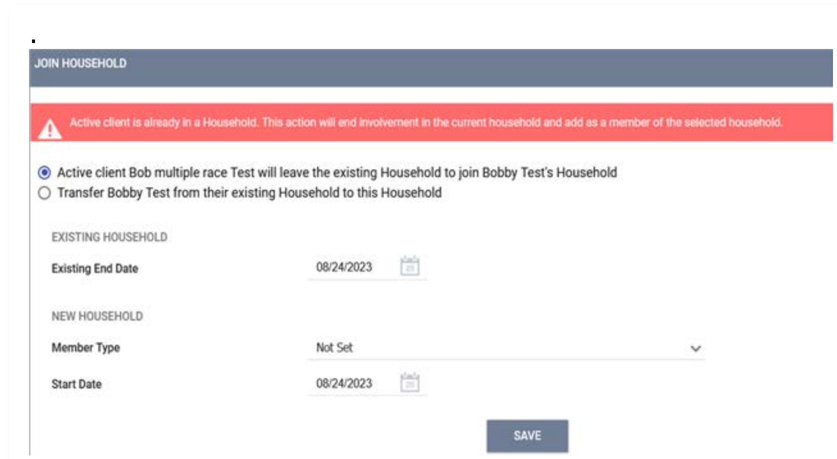
In this example, there are 2 matches. **Bob Test** is the member. Place your cursor on the name. A **+** sign will appear to the left. Click on **+** sign.

Add to Household will display. Select best match for **Member Type**, then **Save**.

Need to add more members? Repeat the process.

Finished creating the household? Time to enroll your household.

You may receive an alert that a client is already in a household. **Clients cannot be in 2 different households at the same time.** In the above screenshot, Bobby Test is already in a household. If you attempt to add Bobby Test to this household, a pop-up will display.



If you transfer this client to a new household, the client will be exited from their current household. To do this:

- **Existing Exit date:** change date if necessary
- **Member Type**: select best match
- **Start Date**: change if necessary
- Click **Save**

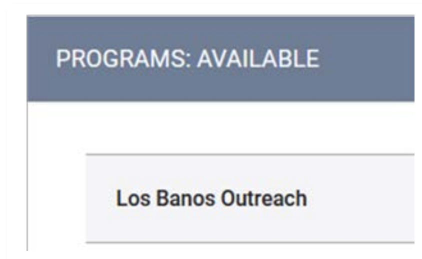
New Client Workflow: Programs

Click **Programs** on the Toolbar to begin the enrollment process into your program. If your client is already enrolled in a program, that information will display in **Program History**.

In this example, the client is enrolled in **HSA-Housing Disability & Advocacy Program**

- **Start Date**: date client was enrolled
- **End Date**: **Active**: client is enrolled in the program. If a date displays: date client was exited.
- **Type**: If Individual displays, client was enrolled as a single.

Scroll down to see **Programs: Available**. Any program(s) you can enroll your client will display. In this example, you can enroll your client in **Los Banos Outreach**.
To enroll, click **Los Banos Outreach**.



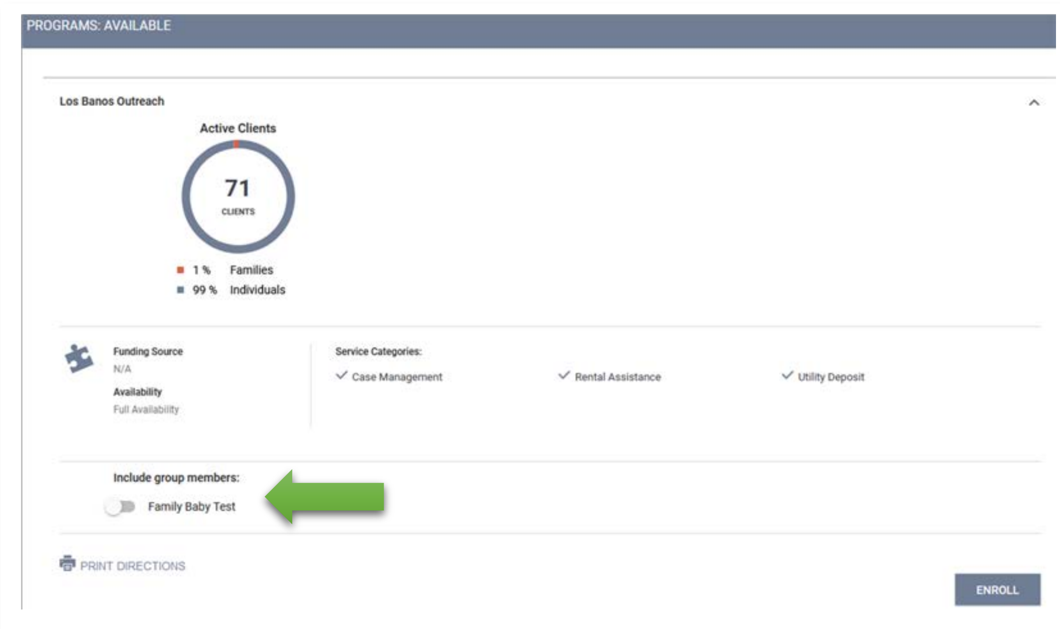
Recommendation: If you will be enrolling a family, begin the enrollment process from the head of household's record.

New Client Workflow: Programs

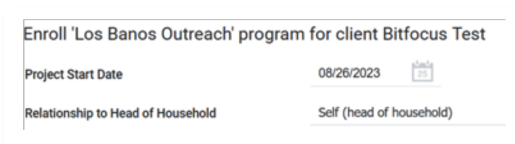
After clicking on **Los Banos Outreach**, this will display:

Want to Include group members? (green arrow)

- Click on each group member to include in the enrollment
- In this example there is 1 group member: **Family Baby Test**
- Click **Enroll**



The Enrollment page will display. At the top of the page you will see:



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

Relationship to Head of Household: since we began the enrollment process from the head of household's Profile page, **Self (head of household)** displays.

Depending on the program, additional question to answer may display.

New Client Workflow: Programs

- **Project Start Date**: defaults to today's date. Change if necessary.
- Starting with **Prior Living Situation (blue arrow)**, enter data.
- If the client is single, and once data has been entered, click **Save & Close**.
- If client is in a household, instead of **Save & Close**, you will see **Save & Next**.
- Next member's page will display. If you changed the **Project Start Date** for the head of household, change the Project Start date to match.

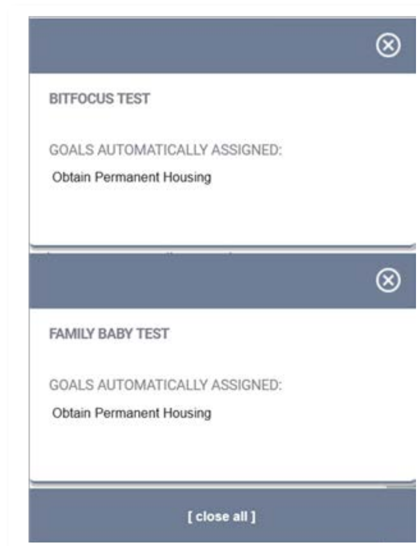
When do I enter a Housing Move-in Date? When the client/household has been permanently housed, enter the date the client/household moved into the permanent unit.

- **Relationship to Head of Household**: select best match. In this example, Family Baby Test is the daughter, so select **Head of household's child**.
- Enter data for all applicable questions.
- Repeat this process for any additional group members.

- Click **Save & Close** when done.

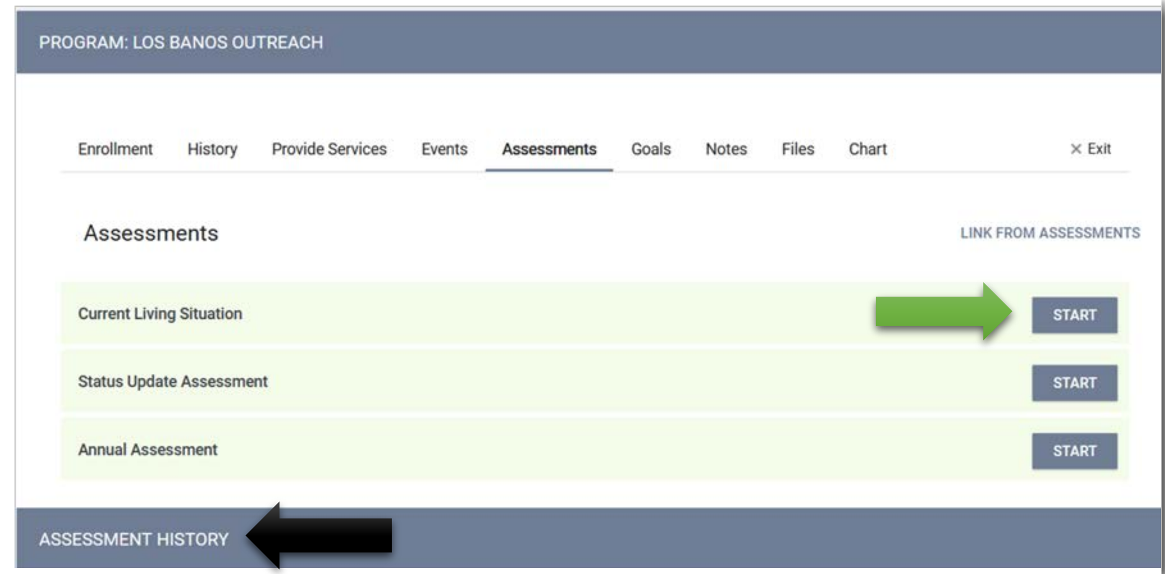
If your program has been configured to automatically assign one or more goals at enrollment, those assigned goal(s) will display for each group member.

- Click **[close all]**



New Client Workflow: Assessments

After clicking on **[closing all]**, you will be on the Assessments page. One or more assessments may display under **Assessments**. In this example, 3 Assessments display, all with **Start** to the right.



Completed Assessments will display under **Assessment History** (blue arrow).

To complete the **Current Living Situation**, click Start (green arrow)

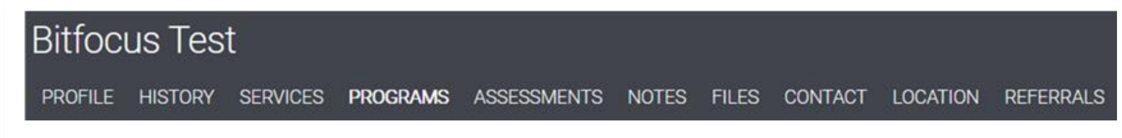
- Since this client is in a household, a pop-up appears.
- To include all household members, Click **Add Current Living Situation.**
- Enter the requested data. Click **Save & Next.**
- Enter data for the next household member.
- More household members? Click **Save & Next**.
- Click **Save & Close** when data for all household members entered.

When do I enter a Status Update Assessment? When a significant change takes place in your client's life after enrollment. For example, if your client had no monthly income at enrollment, but now is receiving $750 in monthly income, click Start on Status Update Assessment and enter data on the client's income.

When do I enter an Annual Assessment? If your client is enrolled in your program for a year or more, HUD mandates that you complete an **Annual Assessment**. For example: if this client was enrolled on 8/26/2022, you would complete an **Annual Assessment** on or before 8/26/2023.

New Client Workflow: Toolbars

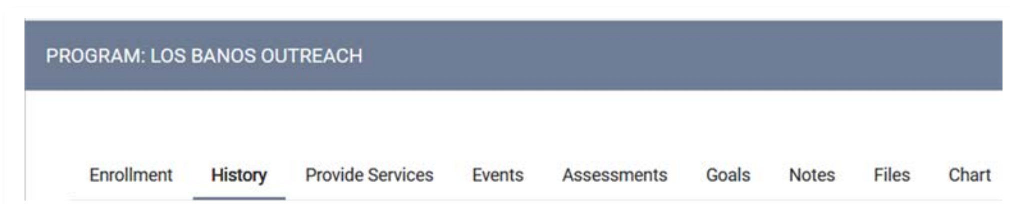
Immediately below your client's name, you will see this toolbar:



- **Profile**: click to display data entered to create the client's profile.
- **History**: click to review the program(s) client has been enrolled in.
- **Services**: click to review services provided to the client.
- **Programs**: click to review enrollment history, and to view additional programs you can enroll the client in.
- **Assessments**: click to complete a VI-SPDAT and to review completed assessments.
- **Notes**: click to add a new note or review existing note(s). Can also add/review public alerts.
- **Files**: click to add a file or a form.
- **Contact**: click to add contact information (phone and email).
- **Location**: click to add location (address).
- **Referrals**: click to review referrals by agency or by program category.

From the Program dashboard page, you can also complete the following:

- **Enrollment**: click to review the data entered for the program entry.
- **History**: click to review service history.
- **Provide Services**: click to add service(s).
- **Events**: click to Coordinated Entry (CE) events (if your program has been configured for CE events).

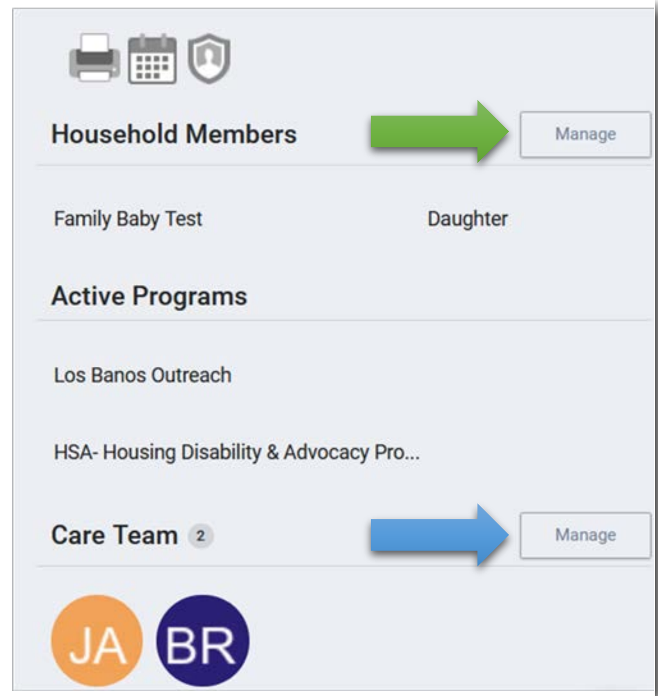


- **Assessment**: click to add a new assessment, or to review completed assessment(s).
- Goal: click to add a goal or review the status of a goal (if your program has been configured for goals).
- **Notes**: click to add a new note or review existing note(s).
- **Files**: click to add/upload a file.
- **Chart**: click to review chart data.

Existing Client Workflow: Access Client Profile

Although your client may be new to you, they may already be in HMIS. Search for the client and if they are in HMIS:

- Scroll over your client's name.
- The pencil icon will appear.
- Click on the pencil icon to display their Profile page.



On the right side of the screen:

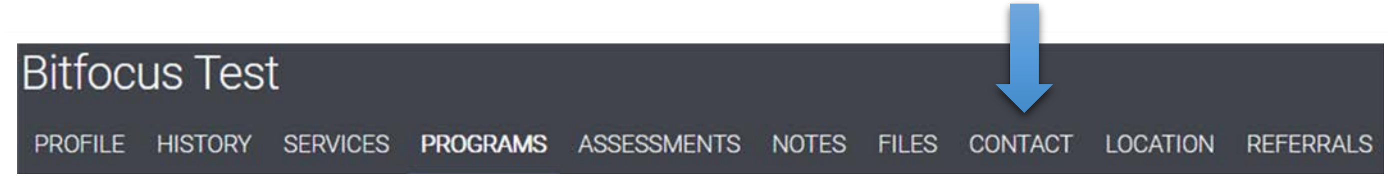
- **Household members**: If the client is in a household, each member of the household will display. Click Manage (green arrow) to add or edit members.
- **Active Programs**: If a program(s) is listed, the client is currently enrolled in that program(s). Click on the program to access their enrollment.
- **Care Team**: Click Manage (blue arrow) to who is on the client's care team, or to add a new care member.

Client already enrolled in your program?
Scroll over the program to see the pencil icon. Click on the pencil icon to access their enrollment.

Client not enrolled in your program?
Click Programs (top of page) to display **Program History** and **Programs: Available**. In **Programs: Available**, click on your program to begin the enrollment process.

- **Need help in entering data?** Go to New Client Workflow: Programs (page 12) for information on the enrollment process.

Existing Client Workflow: Add Contact Information

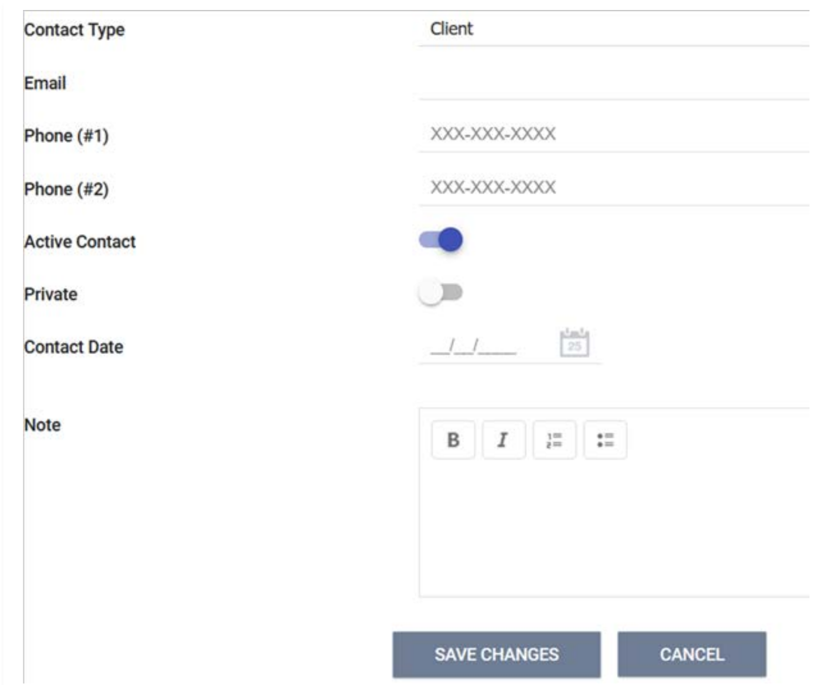


Add Contact Information

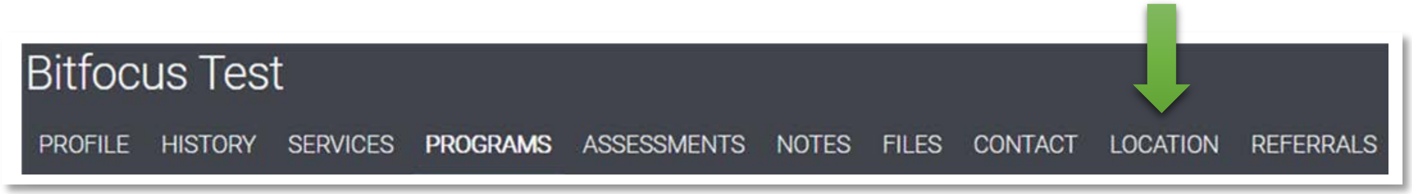
- Click **Contact** (blue arrow).
- Click **Add Contact +**.
- Note: all data fields are optional.
- Enter **Email**, **Phone**, **Contact Date,** and **Note**.
- **Private:** click on white circle to turn the circle blue.

Note: Setting **Contact** to private means other agencies will not be able to see the client's contact data.

- Click **Save Changes.**



Existing Client Workflow: Add Location

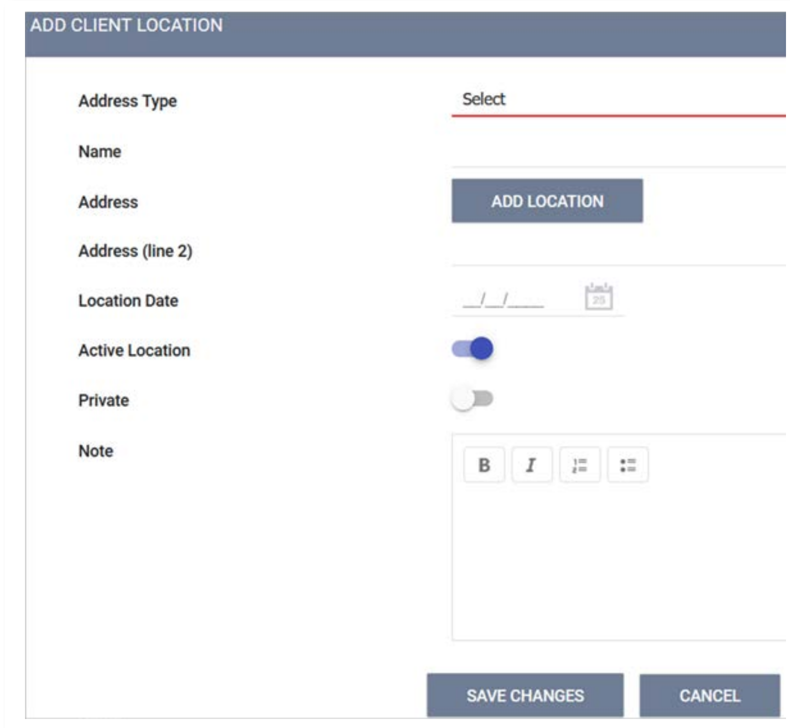


Add Contact Information

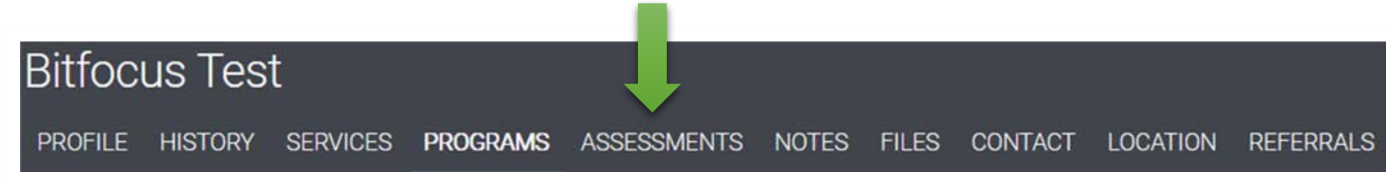
- Click **Location** (green arrow).
- Click **Add Address +**.
- **Address Type**: select best match.
- **Name**: enter client's name.
- **Add Location**: click to display pop-up. Enter client's address. Click **Add.**
- **Location Date**: enter date.
- **Private:** click on white circle to turn the circle blue.

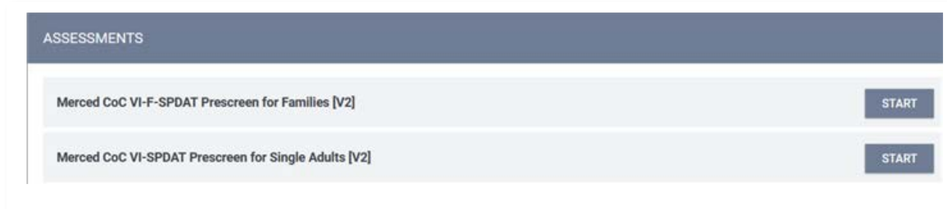
Note: Setting **Location** to private means other agencies will not be able to see the client's location.

- **Notes:** enter a note (optional).
- Click **Save Changes.**

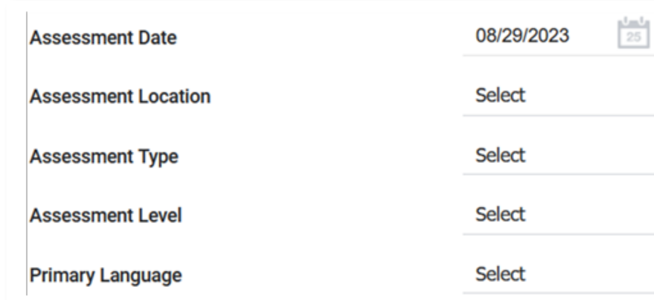


Existing Client Workflow: Complete a VI-SPDAT

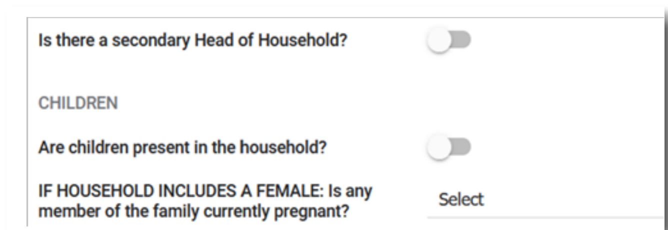




- Click **Assessments** (green arrow).
- Click **Start** on Families or Single Adults.
- The VI-SPDAT you selected will display.



- **Assessment Date:** defaults to today's date. Change if necessary.
- **Assessment Location:** select best match.
- **Assessment Type:** select best match.
- **Assessment Level:** select **Housing Needs Assessment**.
- **Primary Language:** select best match.



If you selected the VI-SPDAT for Families, you will also be asked:

- **Is there a secondary Head of Household?** If you move the circle, you will be asked to enter their name, gender, and date of birth.
- **Are there children present in the household?** If you move the circle, you will be asked to enter the number of children.

Enter data for the remainder of all the VI-SDPAT fields.

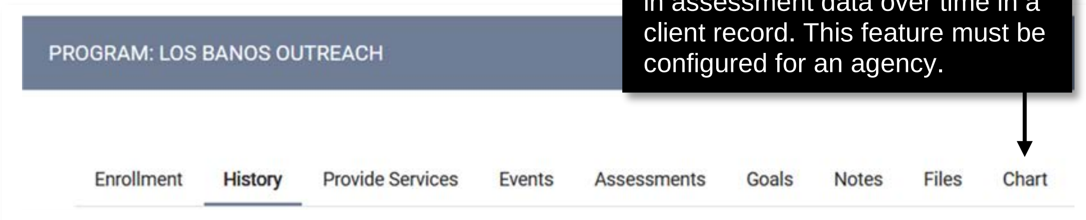
Click **Save** when done.

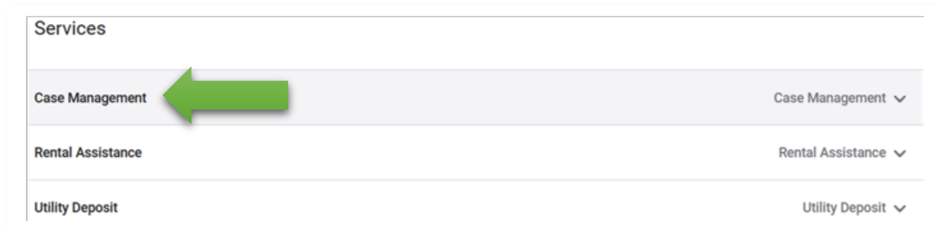
Existing Client Workflow: Add Services, Assessments, Goals, Notes, and Files

Click Programs, then select the program the client is enrolled in:

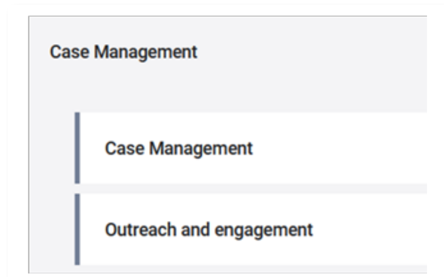
What is a Chart? A chart allows agencies to track/display changes in assessment data over time in a client record. This feature must be configured for an agency.

- **Enrollment**: click to review their enrollment data.
- **History**: click to review their **Program Service History**.
- Click **Provide Services** to add one or more services.
- In this example 3 **Services** have been configured for this program.
- **Services** may have subcategories of services. Click on a service (green arrow) to see if there are any subcategories.

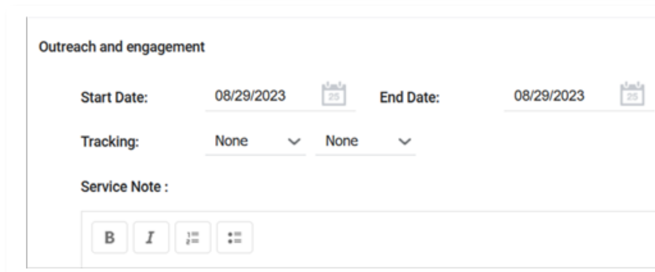




- In this example, 2 types of **Case Management** display. Click on best match.



- **Start Date**: defaults to today's date. Change if necessary.
- **Tracking**: Select hours and minutes of CM session (optional).
- **Service Notes**: enter notes (optional).
- Click **Submit.**

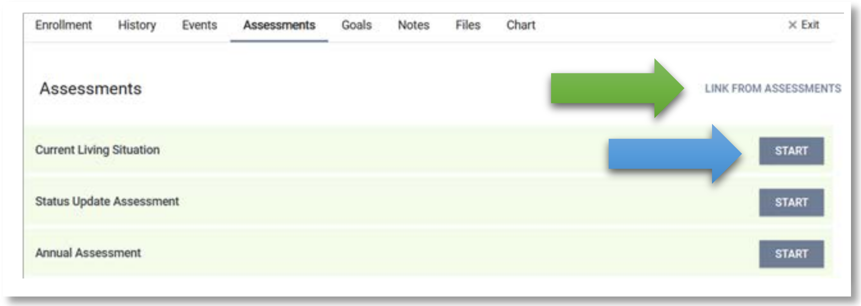


Some services only require a start/end date. Other services allow you to enter a funding source, dollar amount, etc.

Existing Client Workflow: Add Services, Assessments, Goals, Notes, and Files

Click **Assessments** to display a list of assessments configured to your program. Assessments can vary from program to program, so your list of available assessments may be different.

Before starting an Assessment, scroll down to the Assessment History section to see if that Assessment has already been completed for the client.

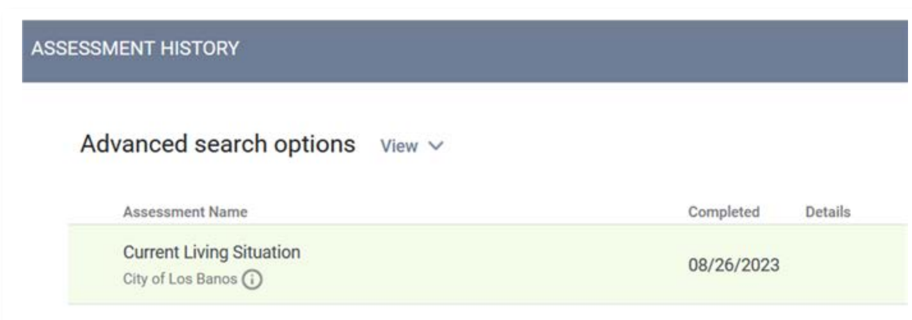


How to enter an Assessment for the client:

- Locate the Assessment from the list. Example: **Current Living Situation.**
- Click Start to right of **Current Living Situation** (blue arrow).
- **For more information** on how to complete an Assessment: go to **New Client Workflow: Assessments, page 15.**

Scroll down to view **Assessment History**. Any completed Assessment will be displayed.

In this example, a **Current Living Situation** Assessment was completed for the client on 8/26/2023 by the City of Los Banos.

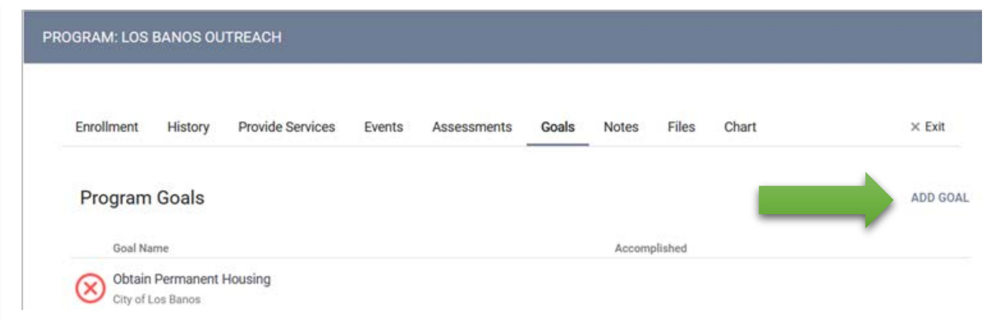


- Scroll over the name of the Assessment to reveal 2 icons: a garbage can, and a pencil.
- Click the pencil to display the data entered in the Assessment.
- Click the garbage can to delete the Assessment. A pop-up will appear, asking you to confirm deleting.

Existing Client Workflow: Add Services, Assessments, Goals, Notes, and Files

If your program has not been configured to record goals, **Goals** will not appear in the toolbar. If your program has been configured to record goals, click **Goals**.

In this example, **Obtain Permanent Housing** has been entered as a goal for this client.



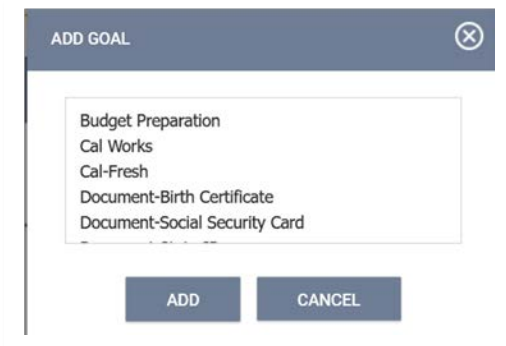
Some programs have been configured to automatically enter this goal at enrollment.

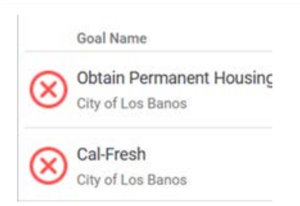
The red X means the goal has not yet been accomplished.

To enter a goal: click **Add Goal** (green arrow).

Select the goal from the list of available goals. Click **Add**.

If you select **Cal-Fresh** the **Program Goals** section refreshes to display:





How do I change the red X to a green check mark? A green check mark means the goal has been accomplished.

Every goal is associated with a measure, typically either Time-based or Service-based. Goals are also linked to services.

A time-based goal (example: Case Management) is accomplished when you enter a Case Management service and record how long the session lasted. A service-based goal (example: Cal-Fresh) is accomplished when you enter a service detailing the client is receiving Cal-Fresh.

Goals and linking those goals to services must be configured into your program before you can enter goals and track their outcomes.

Existing Client Workflow: Add Services, Assessments, Goals, Notes, and Files

Click **Notes** on the toolbar, then select **Add Note**.

Title: enter a title for the note.

Category: select best match.

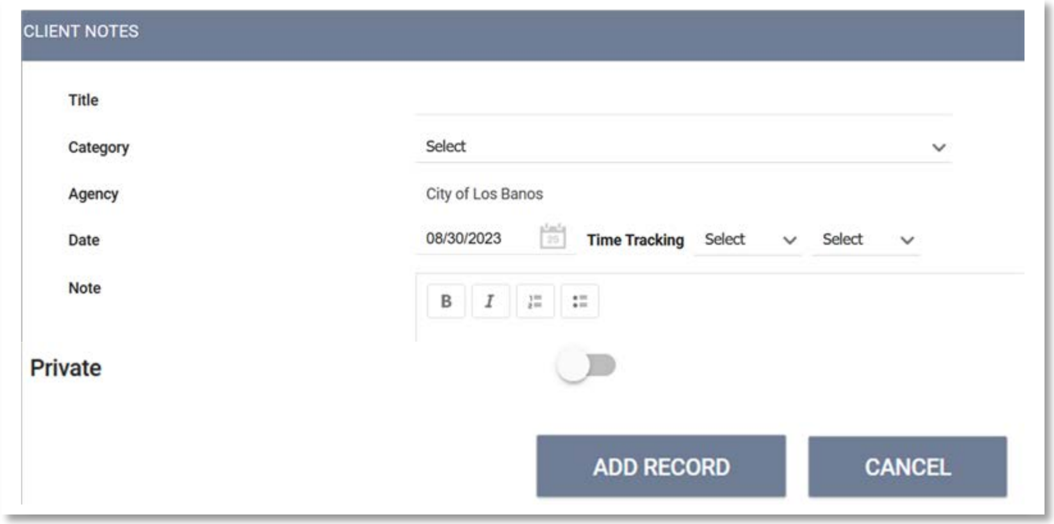
Date: defaults to today's date. Change if necessary.

Time Tracking: enter hours/minutes if want to track how much time you spent with the client.

Note: enter note data detailing what happened.

Private: click white circle until it turns blue if you want to make this note private.

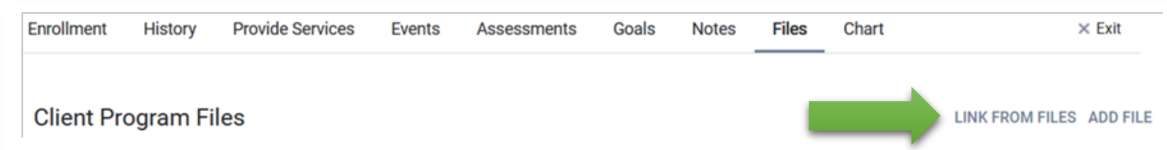
Click **Add Record**.



Existing Client Workflow: Add Services, Assessments, Goals, Notes, and Files

Click **Files** in toolbar to display:

- Click **Link From Files** or **Add File** (green arrow)



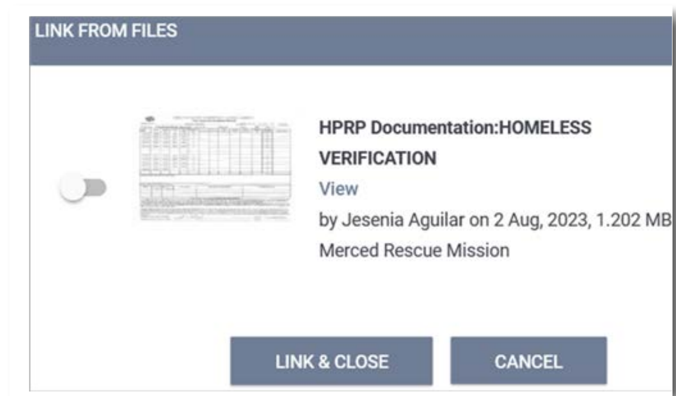
Link From File: the file you want to add to this client's file may have been already uploaded. Click to display what files are available.

Add File: click to add a new file.

In this example, clicking Link from File reveals one file has already been uploaded. If this is the file you want:

- Click on the white circle until it turns blue.
- Click **Link & Close**.
- Link will display under **Client Program Files**.

Not the file you want? Click Cancel.



To add a new File, click Add File.

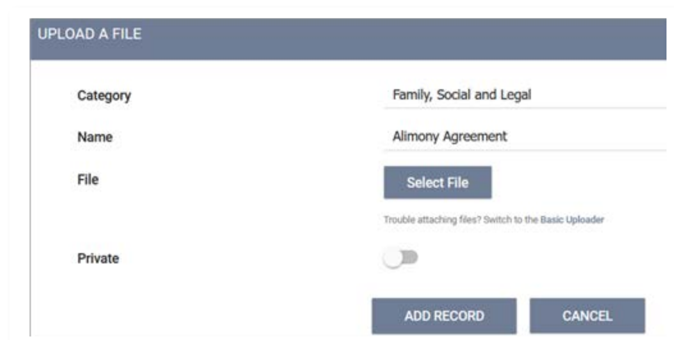
Category: Click on "Family" to select best match.

Name: Click on "Alimony" to select best match.

Click on **Select File** to select a file from your computer.

Private: click on white circle until it turns blue to make this file private.

Click **Add Record.**



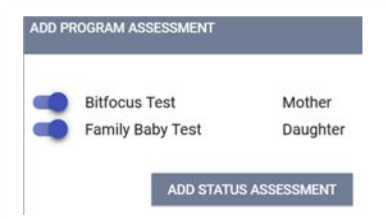
When to Update an Active Enrollment

When you enroll a client in your program, the data you enter describes their situation at the time of enrollment. Over time, there may be significant changes in their life. For example: at the time of enrollment the client had no monthly income, but a month later the client now has an earned income. HUD requires that if a client in enrolled in your program for a year or more, you must enter an Annual Assessment.

Time to update? Go to the client's enrollment, then click **Assessments**.

Click Start for **Status Update Assessment** to record a change if client actively enrolled in your program.

Click Start for **Annual Assessment** if your client's one year anniversary in your program is about to occur.



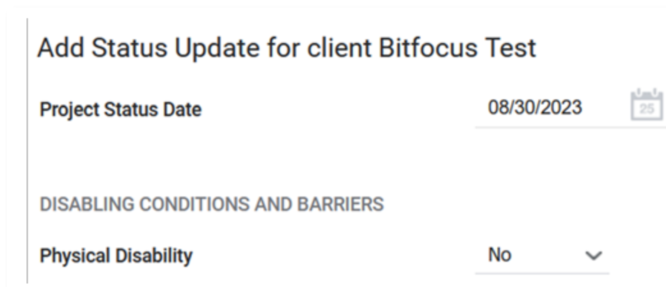
If client is in a household, a pop-up will appear listing members. Click on the white button to the left of a member's name to included them in the **Status Update Assessment**.

Click **Add Status Assessment**.

The Assessment will display.

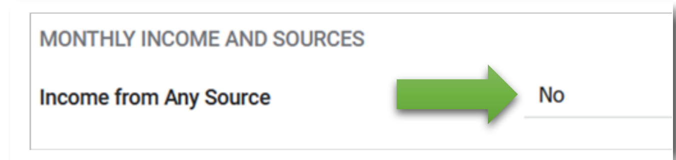
Project Status Date: defaults to today's date. Change if necessary.

Review as you scroll down the assessment.



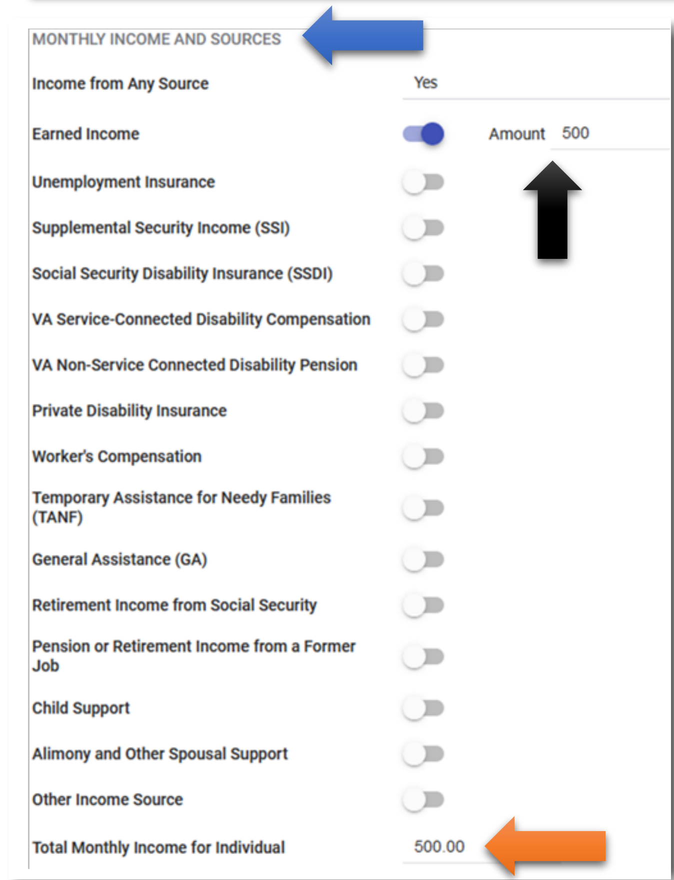
When to Update an Active Enrollment

Scroll down the assessment until you find where you want to enter a status update. In this example, the client had no income at the time of enrollment, but now they have an income.



To record the client is now receiving a monthly income:

- **Income from Any Source**: click on No (green arrow) to reveal a drop- down menu. Select **Yes**.
- **Monthly Income And Sources** table will appear.
- Click on the white circle of the income source. The white circle will turn blue. In this example **Earned Income** was selected.
- The **Amount** field will appear. Enter a dollar amount (black arrow).
- **Total Monthly Income for Individual** will update to that dollar amount (orange arrow).
- Click **Save & Next.**



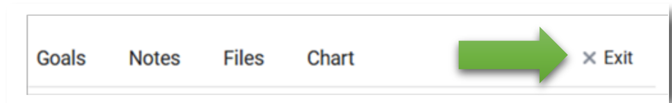
Update any remaining data fields that need to be updated. If the data displayed in a data field is correct, there is no need to do anything.

Click **Save & Close**.

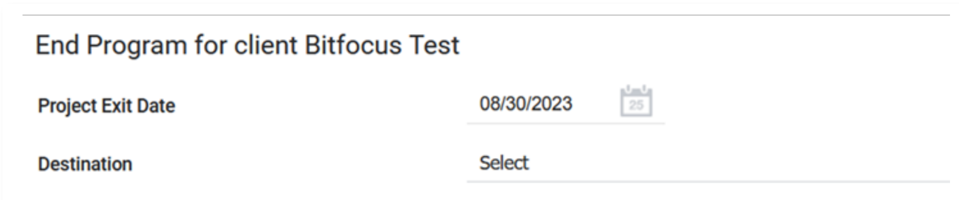
The process for completing the **Annual Assessment** is the same as the process for a **Status Update Assessment**.

Client Exit

An Exit is entered for a client when the client is no longer enrolled in your program. When it's time to exit your client, access their enrollment, then click **x Exit** (green arrow).



If the client is in a household, a pop-up will display, listing household members. Select member(s) to include in the exit. Click **End Program**.



The End Program for client page displays:

- **Project Exit Date**: defaults to today's date. Change if needed.
- **Destination**: select best match.

Review the remaining data fields. Update any field as need. If the client is single, you will be prompted to click **Save & Close.** If the client is in a household, you will be prompted to select **Save & Next**.

- Data fields for the next household member will display.
- Change **Project Exit Date** (if needed) to match the exit date entered for the head of household.
- Destination: select best match.
- If there are more members, you will be prompted to select **Save & Next**.

Once data for all members has been added, you will be prompted to click **Save & Close**.

If you program has been configured to conduct a **Follow-up Assessment**, the page will refresh to display:

- Enter a Follow-up Assessment per your agency's guidelines.
- Create a Follow-Up Assessment following the same guidelines as entering data for any other assessment.