MERCED COUNTY CONTINUUM OF CARE

Homeless Management Information System

November 2023

Updating & Exiting Clients in HMIS

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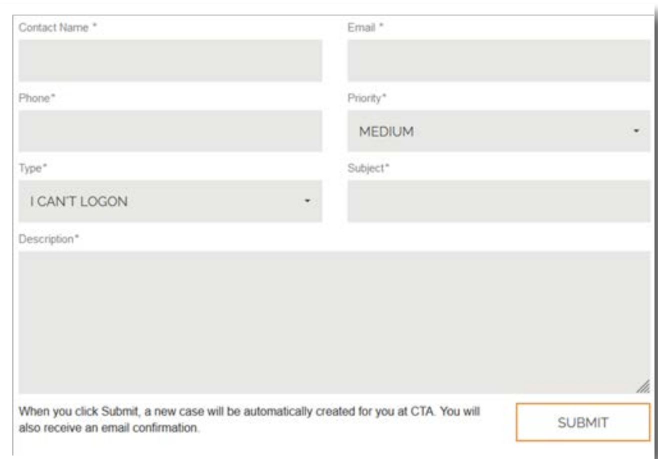
Merced HMIS Web Portal

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.
    - o To file a request for help: click **Help.**
    - o Enter in your name, email, and phone number.
    - o Type, Subject, Description: use these field to let us know what the issue is.
    - o Note: If it is a client related issue, do not enter their name in the **Description** field. Instead, enter their HMIS client ID.
    - o Click **Submit**



HMIS Workflow Overview: Updating & Exiting

Client Search

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

Best Practice: If the client is in a household, search for the head of household.

After searching for, and accessing, the client's Profile page:

Updating the Client's File

1. Click **Programs** tab.
2. In **Program History**: Click the pencil icon of the program to enter new data on the client, **THEN**
3. Click **Provide Services** to add service(s)**.**
4. Click **Assessments** to add a new assessment or to review completed assessment(s).
5. Click **Notes** to enter a new case note or to view existing notes.
6. Click **Files** to upload a document or to view documents already uploaded.

From the Toolbar:

7. Click **Programs** to enroll in a new program.
8. Click **Contact** to add or edit contact information.
9. Click **Location** to add or edit the client's location.

Exiting the Client

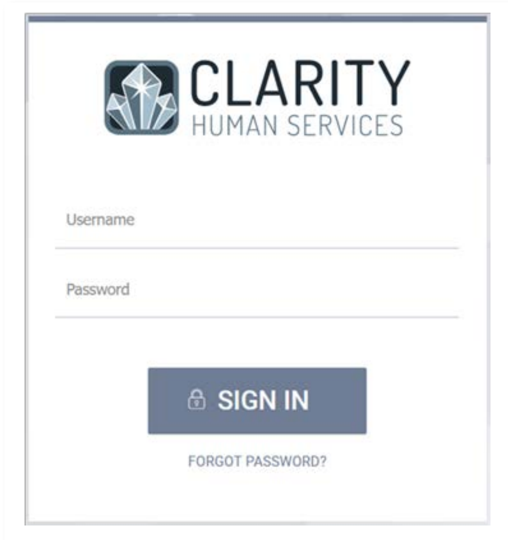
1. Click the **Programs** tab**.**
2. In **Program History**: Click the pencil icon of the program the client will be existing**.**
3. **Did the client or household move into permanent housing?** Enter the move-in date in **Housing Move-In Date**.
4. Click **Exit.**
5. Enter exit data.
6. Click **Save & Close.**

Greater detail and screenshots on how to **Update a client's file** begins on page 5.

Greater detail and screenshots on how to **Exit a client** begins on page **15**.

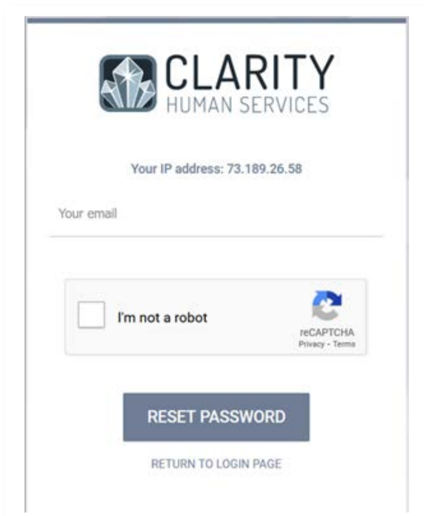
Access HMIS

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



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

Click **Sign In**.



Forgot Password?

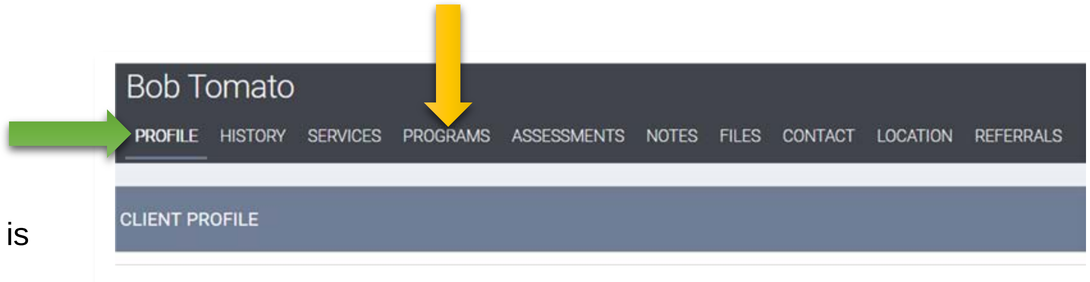
- Click **Forgot Password?**
- Enter in your email address.
- Click **I'm not a robot box.**
- Click **Reset Password.**

Update Client File: Access the Enrollment

Data entered about the client at enrollment details what life looked like for the client at enrollment. As life changes for the client, those changes can be recorded in HMIS.

To update a client's file

- Search for the client.
- Click on the client's name.
- The client's **Profile** page displays.
- Immediately below the client's name is the Toolbar (green arrow).



<u>Use the Toolbar</u> <u>(green arrow)</u> **<u>to</u>:**

- **History**: The advanced search option allows you to search the client's file.
- **Programs**: Enroll client in a new program. View current enrollment(s) in **Program History** section.
- **Contact**: Enter contact information. View or edit existing contact information.
- **Location**: Enter address/location. View or edit existing location information.

<u>To add a Service, Assessment, Note, or a File/Document to their Enrollment</u>:

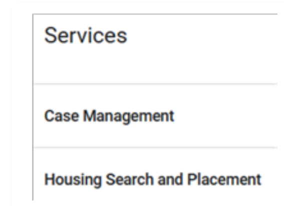
- Click Programs (yellow arrow).
- Click the pencil to the left of the program in Program History.
- The Program toolbar will display (blue arrow).

Update Client File: Services

<u>To add one or more Services</u>:

- Search for and access the client's **Profile**.
- Click **Programs**, then click the pencil to left of the program in **Program History** to access enrollment.
- The **Program** toolbar will display (blue arrow).
- Click **Provide Services** (green arrow).

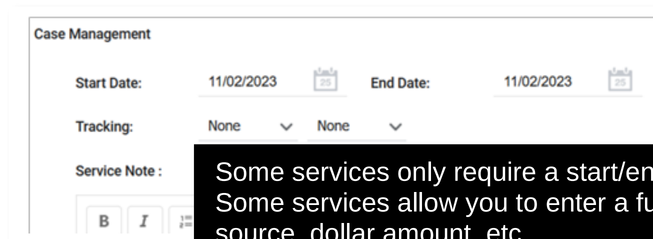
- A list of services will display under **Services**. In this example, **Case Management** and **Housing Search and Placement**.



- Click on a service to see if that service has subcategories.
- In this example, clicking on **Case Management** reveals two subcategories**: Case Management** and **Case Management Referral** (orange arrow).
- Click on a service to enter data on that service.

The Services box displays.

- **Start Date**: defaults to today's date. Change if necessary.
- **Tracking**: Select hours and minutes of CM session (optional).
- **Note**: <u>Many services do not have tracking</u>.
- **Service Notes**: enter notes (optional).
- Click **Submit.**



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

Contact CTA via Help:

- Not all services your program provides listed? Ask CTA to add those service(s)
- To link Goals and Services.

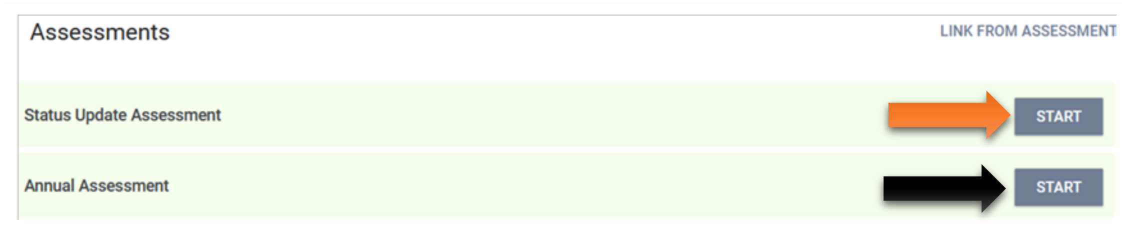
Update Client File: Assessments

For most programs an Intake assessment is entered when you enroll a client in your program. Some programs may enter a VI-SPDAT. **<u>To access available Assessments</u>:**

- Search for and access the client's **Profile** page.
- Click **Programs**, then click the pencil to left of the program in **Program History** to access enrollment.
- The **Program** toolbar will display (blue arrow).
- Click **Assessments** (green arrow).

In this example, **Status Update** & **Annual Assessment** display.

- **Status Update Assessment**: Complete when there is a change in the client's life, and they are still enrolled in your program. Click **Start** (orange arrow) to complete.
- **Annual Assessment**: HUD mandates this assessment be completed if your client has been enrolled in your program for 1 year. Complete this assessment on or before their 1-year anniversary date. Click **Start** (black arrow) to complete.



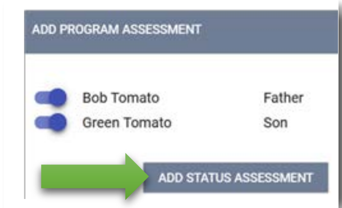
You may see different Assessment(s) when you click on Assessments. The Assessments that do display are based on your program type.

For example: The VI-SPDATS may display instead of Status Update and Annual Assessment.

Update Client File: Assessments

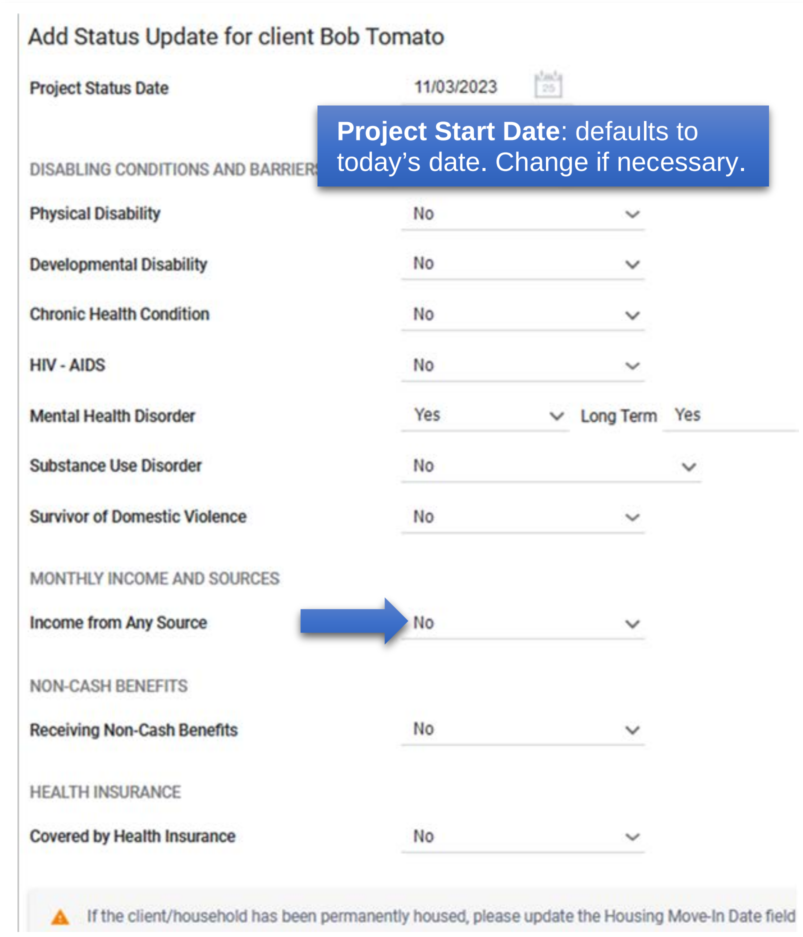
<u>After clicking Start for an Assessment. In this example, the Status Update Assessment was selected</u>:

- **If the client is in a household:** The household displays.
- Click **Add Status Assessment** (green arrow).
- The **Add Status Update** page displays.
- Review and update as needed. **For example:** At the time of the enrollment the client had no monthly income (blue arrow). The client now has an earned income of $750 per month.



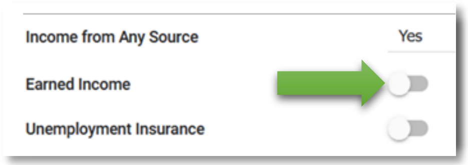
Include all members?
Ensure circles are blue.

Exclude member(s)?
Click on a blue circle to turn that circle white.



<u>To record this change</u>:

- **Income from Any Source** (blue arrow): Change the **No** to **Yes**.
- Various **Income Sources** will display**.**

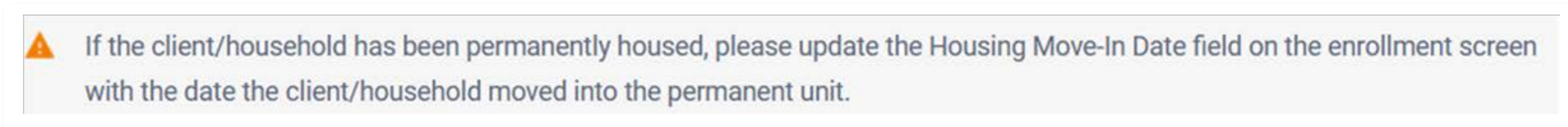


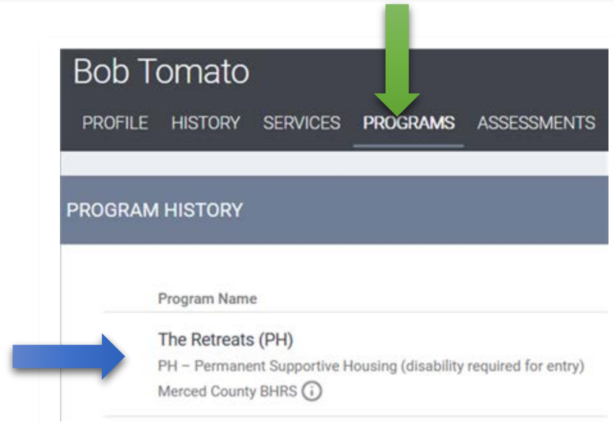
In this example, the source is **Earned Income**.

- Click circle to right of **Earned Income** (green arrow). The circle will move and turn blue.
- The **Amount** field displays. Enter dollar amount.
- Update any other fields as needed.
- Click **Save & Close. <u>Note</u>:** If client in household, **Save & Next** will display.
- If **Save and Next** displays: Click to display the next member of the household. Update as needed.
- Click **Save & Close** when done.

Update Client File: Assessments

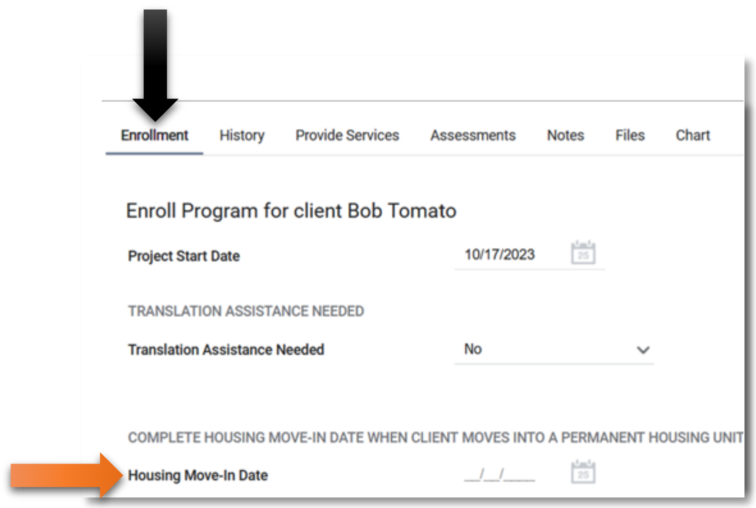
For some **Assessments**, you will see this message at the bottom of the assessment.





<u>Has the client or household moved into permanent housing</u>?

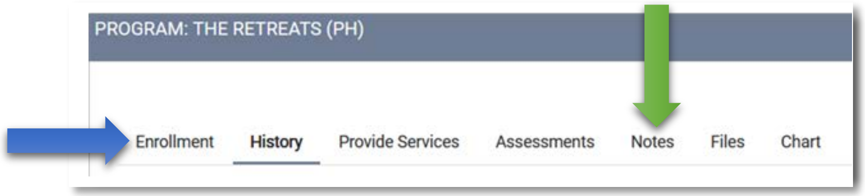
- Finish entering data into the assessment.
- Click **Programs** (green arrow).
- Click pencil to left of the **Program Name** (blue arrow).



- Click **Enrollment** (black arrow).
- **Housing Move-in Date** (orange arrow): Enter date.
- Click **Save & & Close**.

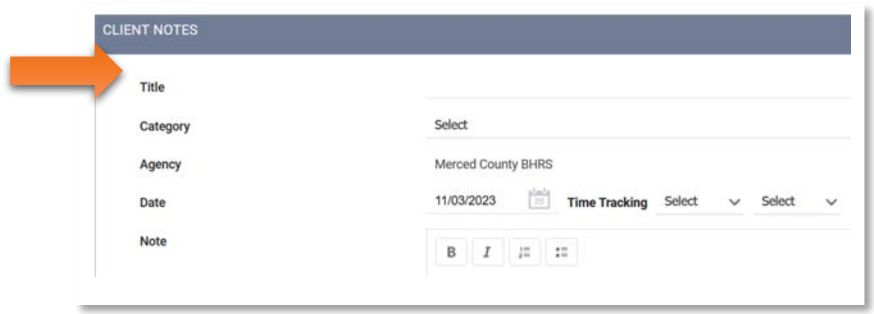
Update Client Files: Notes

<u>To add one or more Notes</u>:



- Search for and access the client's **Profile** page.
- Click **Programs**, then click pencil to left of the program in **Program History** to access enrollment.
- The **Program** toolbar will display (blue arrow).
- Click **Notes** (green arrow).

<u>To add a Note</u>:



- Click **Add Note.**
- **Client Notes** display (orange arrow)**.**
- **Title:** enter a title.
- **Category:** select best match.
- **Agency:** defaults to your agency.
- **Date:** defaults to today's date. Change if needed.
- **Time Tracking** (optional): Select hour(s) and minutes.
- **Note:** enter note.

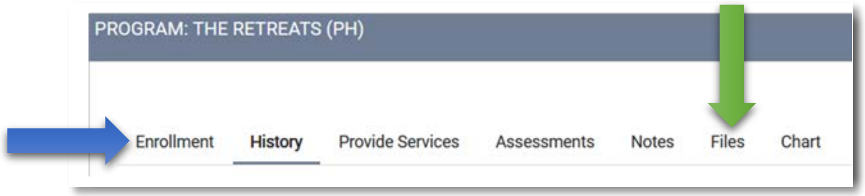
Below the **Note** section, is Private.

- **<u>To make the note private</u>:** click the white circle (black arrow) to move it to the right and turn it blue.
- Note is now private.
- Click **Add Record**.

Update Client Files: Files

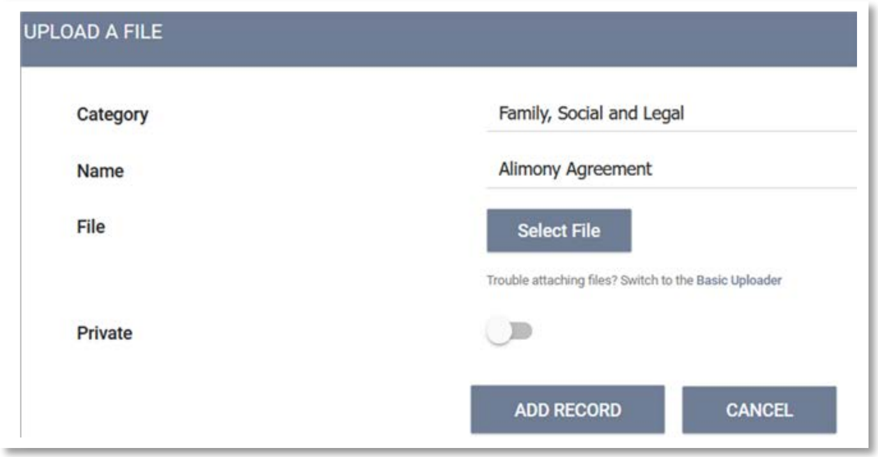
To add one or more Files (documents):

- Search for and access the client's **Profile** page.
- Click **Programs**, then click pencil to left of the program in **Program History** to access enrollment.
- The **Program** toolbar will display (blue arrow).
- Click **Files** (green arrow).



To add a file (document):

- Click **Add File**.
- **Category**: select best match.
- **Name**: select best match.
- **Select File**: click to select file from your computer.
- **Private**: click on white circle to make what was uploaded private.
- Click **Add Record**.



What is Link From Files?
A document you are unloading may have already been uploaded by someone else. If that document has been uploaded, you can link to that document.

Click **Link From Files** to see if what, if any, documents have already been uploaded.

Update Client Files: Programs

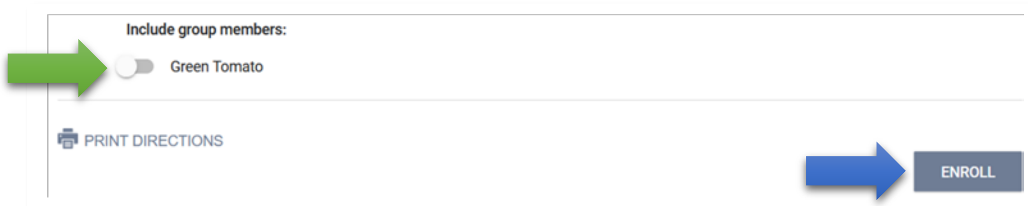
Click **Programs** on the Toolbar to begin the enrollment process into your program. If your client is already enrolled in a program, that information will display in **Program History**.

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 client.

<u>How to enroll a client in another program</u>:

- Scroll down to **Programs: Available**.
- One or more programs may display.
- Click on the program to enroll the client.
- Information on the program will display.
- Scroll down until **Enroll** button displays.
- Client in a household? Household member(s) will display. Click on white button (green arrow to include).
- Click **Enroll** (blue arrow).
- Various data fields will display. Update as needed. Click **Save & Close**. If client in household, **Save & Next** will display. Update data for household members as needed. Click **Save & Close** when done.



<u>No program(s) displays</u>? There are no more programs in your Agency that the client is eligible to be enrolled.

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

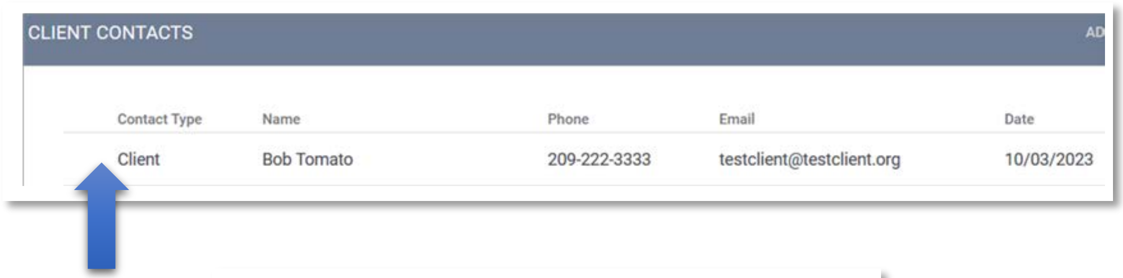
Update Client Files: Contact

Access the client's **Profile** page, then click **Contact** (green arrow).

- **Contact** page displays.
- Enter data such as email, and phone number.
- **Note**: this is an optional data field.
- Click **Save Changes**.

<u>Need to update an existing contact</u>?

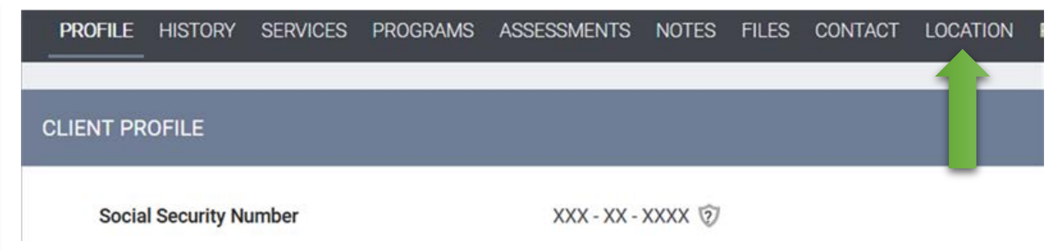
- Click pencil to left of **Client** (blue arrow).
- Update data as needed.
- Click **Save Changes**.



Optional: Contact data can be set to **Private.**

- **Private**: Click the white circle (orange arrow).
- White circle will move and turn blue.
- Click **Save Changes**.

Update Client Files: Location



Access the client's **Profile** page, then click **Location** (green arrow).

- **Location** page displays.
- **Address Type**: select best match.
- **Name**: enter name for address.
- **Location Date**: enter today's date or the date the client provided their address.
- **Note**: optional.
- Click **Save Changes**.

A map will display which you can zoom in and out of. Below the map the client's address will display, along with the person who entered the data.

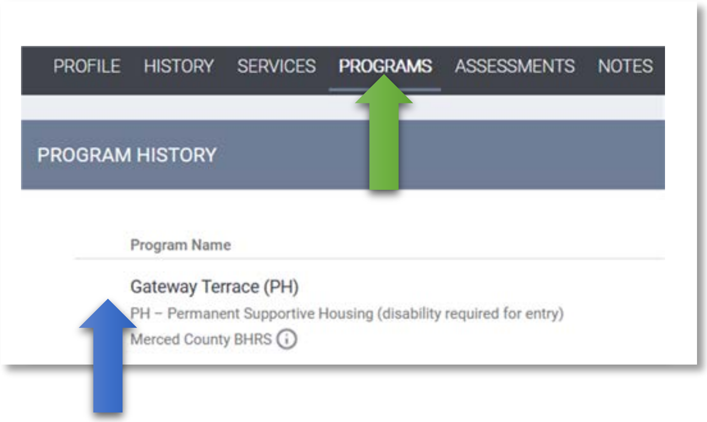
Optional: Location data can be set to **Private.**

- **<u>See previous page for details on how to set the data to private</u>.**

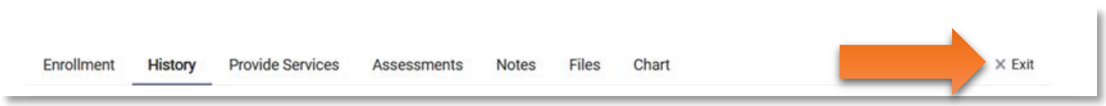
Client Exit

When it is time to exit the client (or the household) from a program:

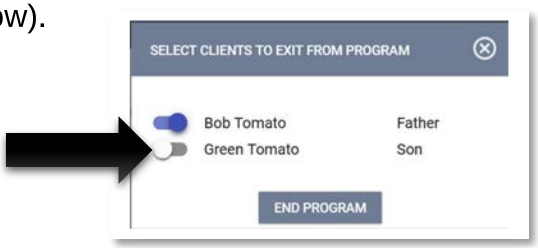
- Access the client's **Profile** page.
- **<u>If in a household</u>**: Access the head of household's **Profile**.
- Click **Programs** (green arrow).
- Click pencil to left of program's name to begin the exit (blue arrow).
- Information on that program will display.



- Click Exit on the program toolbar (orange arrow).
- If client is in a household, the members of that household will display.

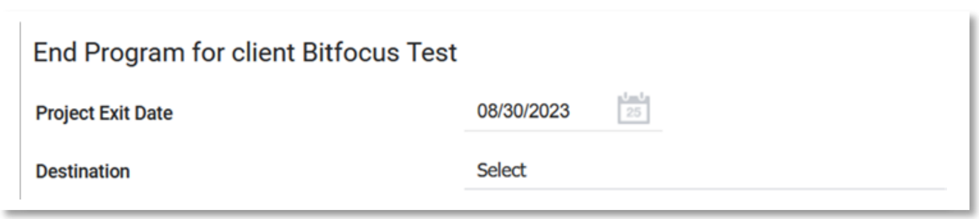


- To include all members, click the white circle (black arrow).
- The white circle will move and turn blue.
- Click **End Program**.



The End Program for client page displays:

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



Client Exit

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

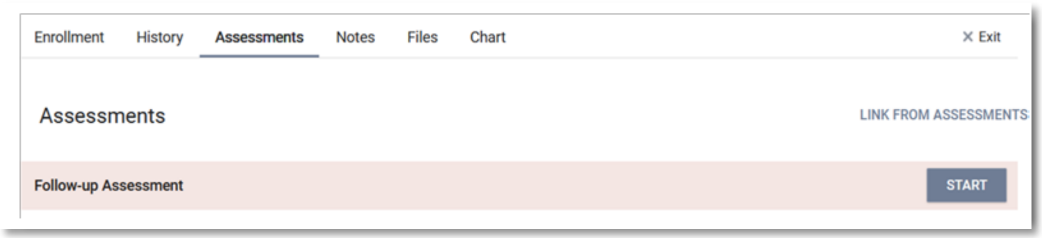
If the client is in a household, you will be prompted to select **Save & Next**.

<u>If in a household, the next member of the household will display</u>.

- Exit date will default to the exit date entered for the head of household.
- Destination: select best match for this member of the household.
- Review other data fields on page. Update as needed.
- If **Save & Next** displays. Click to proceed to next member.
- Repeat this process until all members have been
- 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.
- Click **Start** to begin entering data.
- Create a Follow-Up Assessment following the same guidelines as entering data for any other assessment.



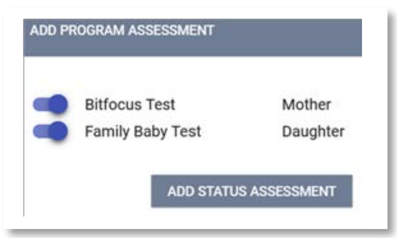
When to Update an Active Enrollment

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.



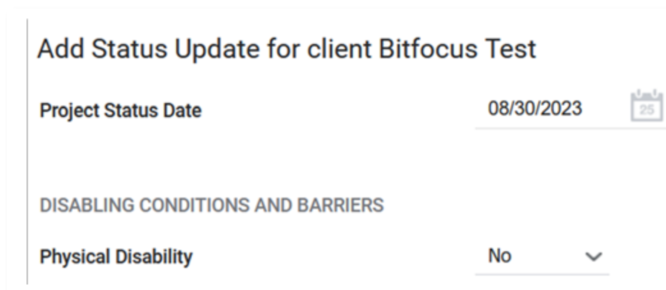
If client is in a household, a pop-up will appear listing members. Click on the white button to the left of a member's name to included them in the **Status Update Assessment**.

Click **Add Status Assessment**.

The Assessment will display.

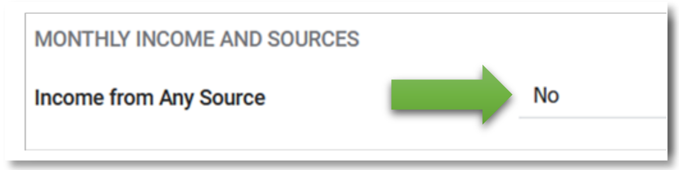
Project Status Date: defaults to today's date. Change if necessary.

Review as you scroll down the assessment.



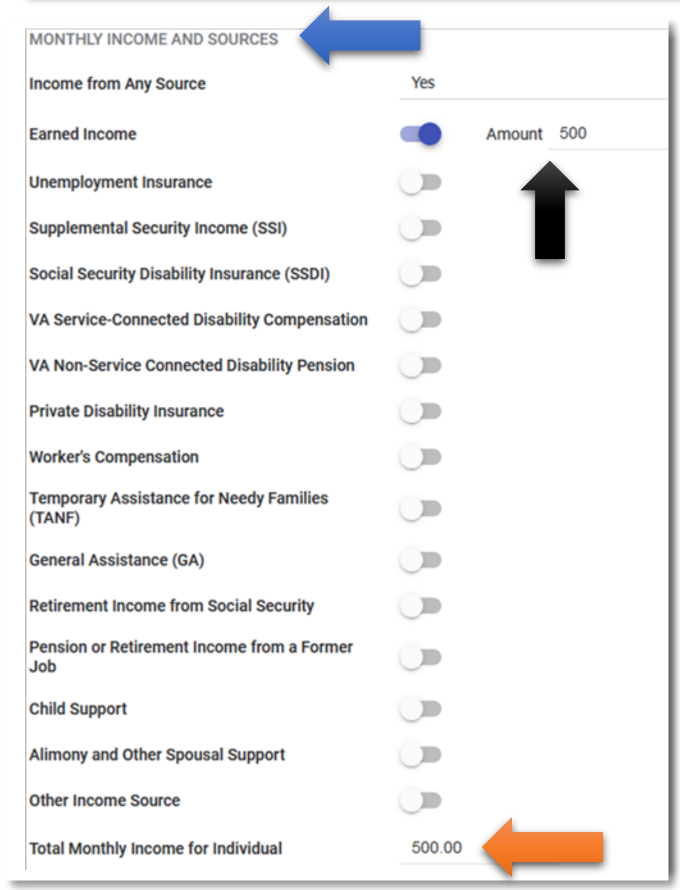
When to Update an Active Enrollment

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**.