SANTA MARIA/SANTA BARBARA CONTINUUM OF CARE

Homeless Management Information System

Revised March 2024

HMIS Workflow Manual: Updating a Client's File

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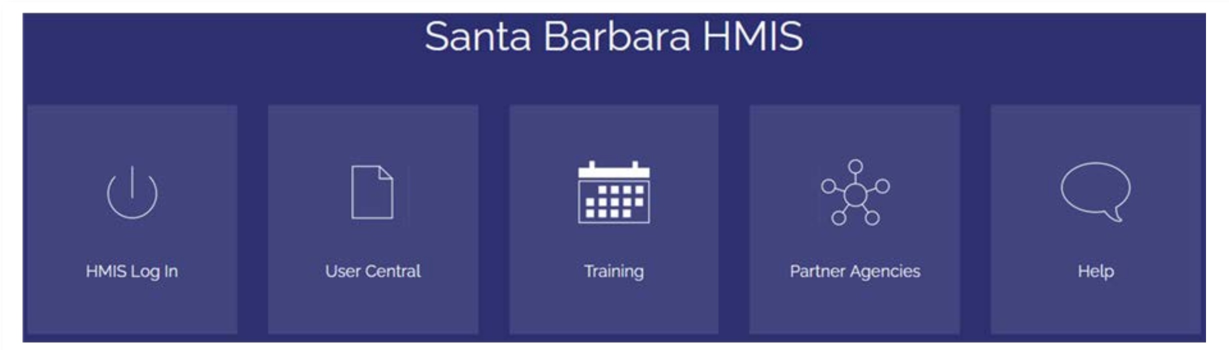
Need to update Non-Cash Benefits or Disabilities?

- Review how to Update Income (page 7).
- The workflow to update Non-Cash Benefits & Disabilities is similar.

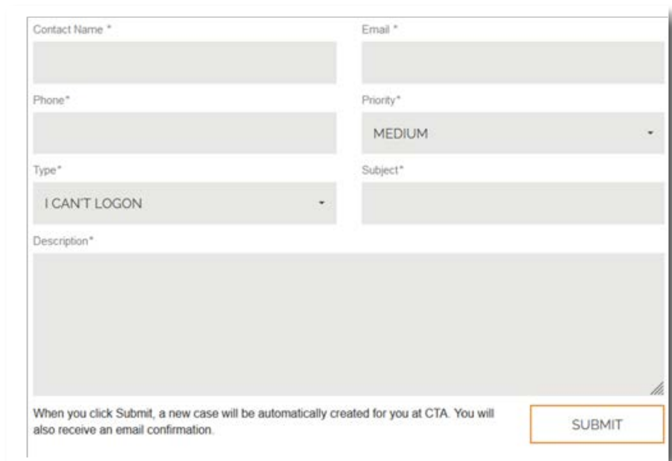
Santa Barbara HMIS Web Portal

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 a client related issue, do not enter their name in the **Description** field. Instead, enter their HMIS ID.
    - Click **Submit**



HMIS Workflow Overview

When you enrolled your client, the data entered detailed what life was like for the client at the time of enrollment.

When something changes, you can record those changes by entering an Interim Review.

Update a Single Client's file

1. Access HMIS.
2. Select project from **Enter Data As** (top right of screen).
3. Search for client.
   - Scroll down to **Client Results**.
   - Click the **pencil icon** to left of client's name.
4. Locate **Entry/Exits** box.
   - Click **pencil icon** to left of the entry.
   - Click **Save & Continue**.
5. Click **Interims**.
   - Click **Add Interim Review**.
   - Select **Interim Review Type** (Update or Annual Assessment).
   - Update data in the displayed Assessment as needed.
   - Click **Save & Exit** when done.
6. When it's time to exit the client:
   - Scroll down to **Entry/Exits** box.
   - Click the pencil icon in the **Exit Date** column.
   - Enter **Exit Data**. Click **Save & Continue**.
   - Review and update data as needed.
     Click **Save & Exit.**

Update Clients in a Household

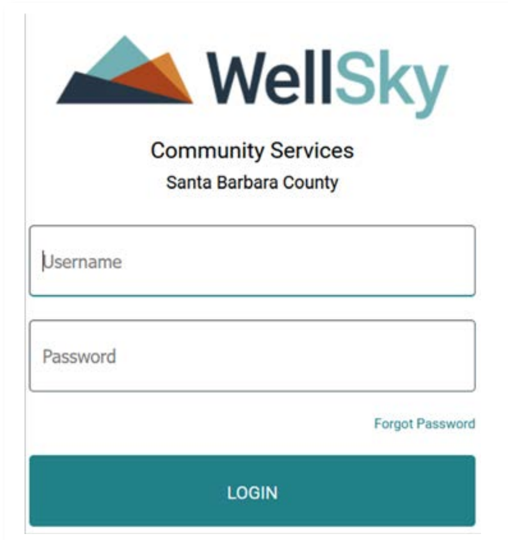
1. Access HMIS.
2. Select project from **Enter Data As** (top right of screen).
3. Search for the head of household.
   a. Scroll down to **Client Results**.
   b. Click the pencil icon to left of client's name.
4. Locate **Entry/Exits** box.
   a. Click pencil icon to left of the entry.
   b. Click **Save & Continue**.
5. Click **Interims**.
   a. Click **Add Interim Review**.
   b. Select **Interim Review Type** (Update or Annual Assessment.
   c. Update head of household as needed.
   d. **Other adults in the households?**
      Click their name to update as needed.
   e. **Minors in the household?**
      No need to update unless disability or health coverage has changed.
   f. Click **Save & Exit** when done.

Access HMIS

Link to HMIS site: https://wscs.wellsky.com/santabarbara/com.bowmansystems.sp5.core.ServicePoint/index.html

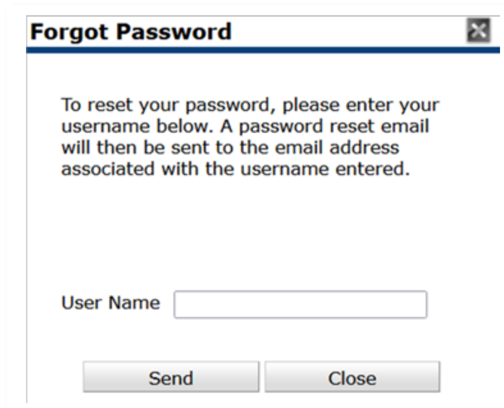
Enter your **Username** and **Password**.

Click **LOGIN**.



Forgot Password
Click **Forgot Password**

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

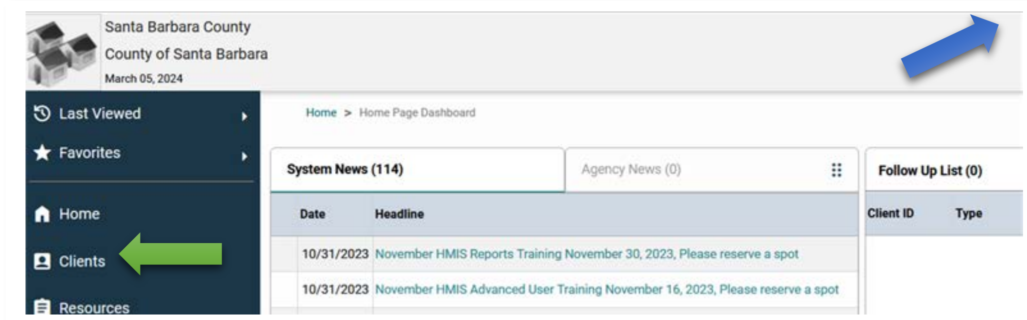


Updating a Single Client: Access their Client Profile

<u>Step 1</u>
Access HMIS. Enter your username and password. Your **Home Page Dashboard** will display.

Although this screenshot does not display **Enter Data As**, look to the top right of your screen to see **Enter Data As (blue arrow)**.

Click on **Enter Data As** and select your project.



<u>Step 2</u>
Click **Clients** (green arrow).

Search for your client by entering their name in **Client Search**. Click **Search**, then scroll down to **Client Results**.

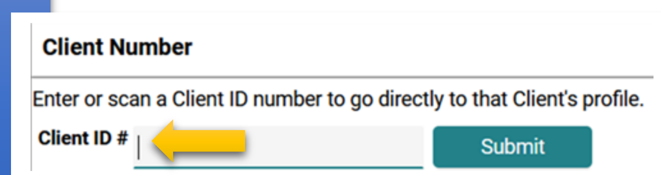
Click the pencil to the left of the client's name. Their **Client Profile** page will display.

Tip: <u>Know your client's HMIS ID</u>?

Enter their HMIS ID # in **Client Number** (yellow arrow)

Click **Submit**.

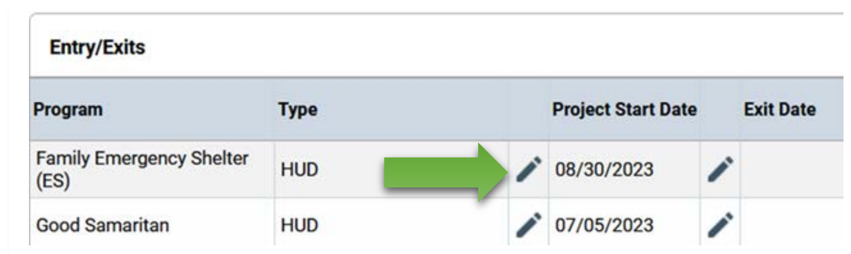
The client's **Profile** page will display.



Updating a Single Client: Create Interim Review

<u>Step 3</u>
Locate the Entry/Exits box on the client's **Profile**.

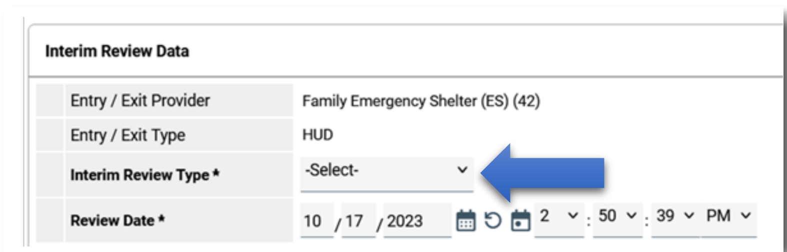
- Locate the project entry in the **Project Start Date** column.
- Click the pencil icon. In this example the 8/30/2023 entry was selected (green arrow).
- The **Edit Project Start Data** will pop-up.
- Click **Save & Continue**.


Entry/Exits

Program	Type	Project Start Date	Exit Date
Family Emergency Shelter (ES)	HUD	08/30/2023	
Good Samaritan	HUD	07/05/2023	

- Click **Interims** icon (orange arrow).
- Click **Add Interim Review**.

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups
(160) Smith, Johnathan		08/30/2023			


Interim Review Data

Entry / Exit Provider	Family Emergency Shelter (ES) (42)
Entry / Exit Type	HUD
Interim Review Type *	-Select-
Review Date *	10 / 17 / 2023 2 : 50 : 39 PM

The **Interim Review Data** page displays.

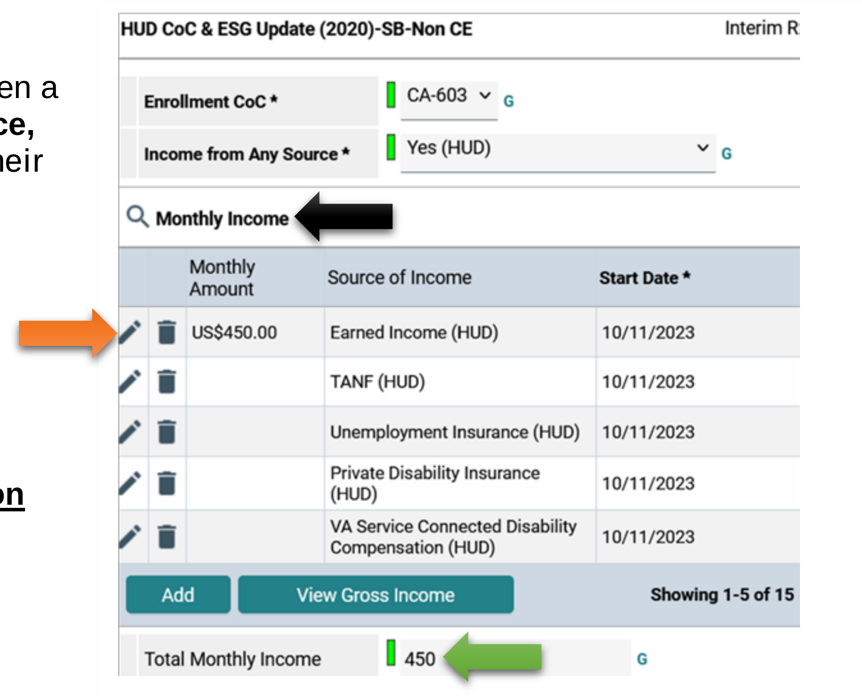
- **Interim Review Type**: select either **Update** or **Annual Assessment** (blue arrow).
- **Review Date:** defaults to today's date. Change if needed.
- Click **Save & Continue.**

<u>Which Interim Review Type to select?</u>

- Select **<u>Update</u>** in most cases.
- Select **<u>Annual Assessment</u>** if the client has been enrolled in your project for 1 year, or it has been 1 year since their last **Annual Assessment**).

Once an Interim Review Type is selected, the data entered at enrollment will display. Review the data entered and make any necessary changes.

Updating a Single Client: Interim Review



<u>If Update was selected for the Interim Review</u>:
Common reasons to update a client's file is there has been a change in the client's **Monthly Income, Health Insurance,** or **Non-Cash Benefits**, or there has been a change in their **Current Living Situation**.

<u>Scenario 1</u>: At enrollment, the client's total monthly income was $450.00 (green arrow). The client's income increased to $750 on 10/18/2023. **<u>To correctly enter data to show this change in income</u>**:

<u>If the income source is displayed, click the pencil icon</u> (orange arrow).

- Enter an **End Date**.
- Click **Save & Add Another.**
- Enter **Monthly Amount,** select for **Source of Income, Receiving Income Source?**
- **Start Date** defaults to one day later than the **End Date** you entered**.**
- Click **Save.**

<u>If the income source isn't displayed, click the magnifying glass</u> (black arrow).

- Click the pencil icon for the income source you want to change.\
- Enter **End Date**, then click **Save**.
- Click **Add.**
- Enter **Monthly Amount,** select for **Source of Income, Receiving Income Source?**
- **Start Date** defaults to one day later than the **End Date** you entered**.**
- Click **Save.**

Updating a Single Client: Interim Review

Immediately below the **Monthly Income** box is the **Total Monthly Income** data field (green arrow).

- Change the amount to reflect the amount of all income sources.
- If there is nothing else to change, scroll down to the bottom and click on **Save & Exit**.

Best Practice: When you put an end date on a Disability, Income Source, Non-Cash Benefit, or Health Insurance:

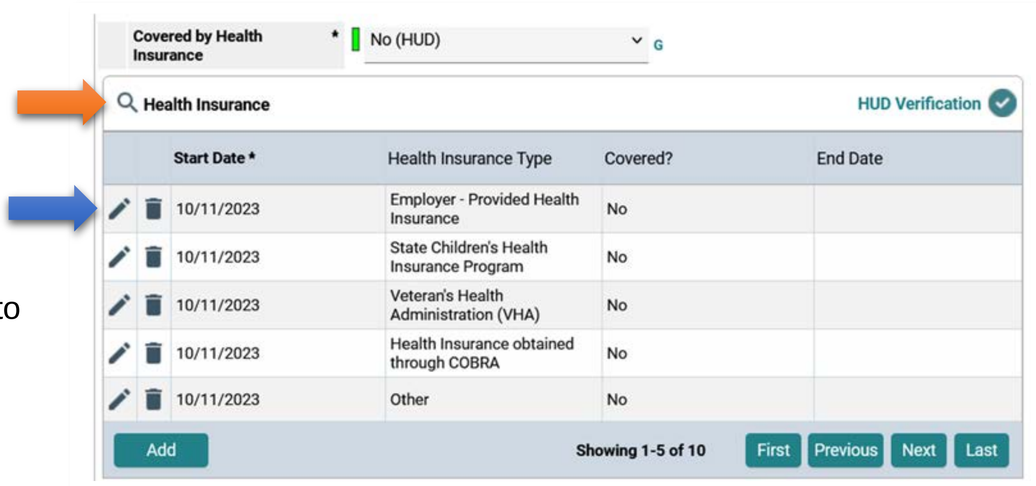
- **Select the next day when entering a change.**
- **Example: 10/17/2023 was the end date entered when the client stopped earning $450/month. In entering that the client is now earning $750/month, the next day (10/18/2023) was selected as the start date.**

Updating a Single Client: Interim Review

This section describes how to create an Update in order to record a change in Health Insurance. Follow the same general process for Disabilities, and Non-Cash Benefits.

If the client had no health insurance at the time of enrollment, but now has health insurance, here are the steps to enter that change.

As with entering changes in income, locate the project entry, click the pencil to the left of that entry, then click Interims. Select Update or Annual Assessment.



In this scenario, the client did not have health insurance at enrollment, but now has insurance. Steps to correctly entering that change:

- **Covered by Health Insurance**: change to Yes.
- Click the pencil icon corresponding to the type of insurance the client now has. Example: **Employer-Provided Health Insurance** (blue arrow).
- **Type not displayed?** Click magnifying glass to display all types (orange arrow).

- **End date:** enter the day before the date you will enter for when the client secured insurance.
- Click **Save and Add Another**.
- Start Date: will display 1 day later than the end date you entered.
- Select answer for **Health Insurance Type**, and **Covered**.
- Click **Save**.

Updating Clients in a Household: Review

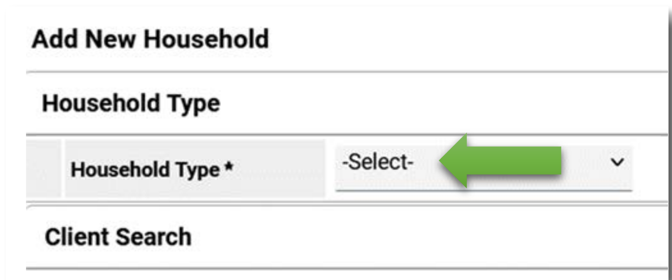
Best Practices:

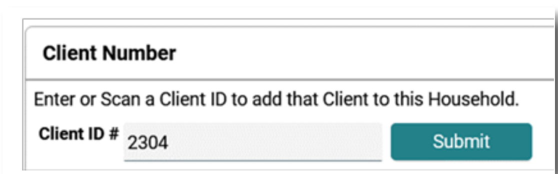
- **If the household configuration has changed, update the household configuration prior to entering Interim data.**
- **A household = clients who live at the same address. A household can be comprised of immediate family, relatives, friends, or roommates.**

<u>Before adding any new data</u>: Does the household configuration need to be updated?
The HMIS Workflow manual (adding new clients) details how to create a new household. Here's a recap:

<u>Scenario</u>: Two new clients have been added: **Client Test** (mom), and **Daughter Test** (child). Since (**2281) Test, Client** is the Head of Household (HoH) click on the client's name to access their **Summary** page.

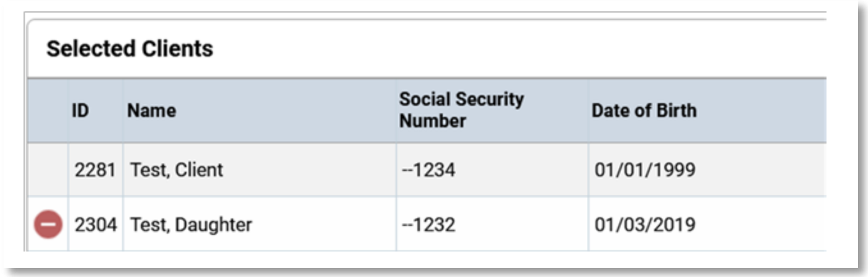
- Scroll down to the Households box. Click **Start New Household**.
- The Add New Household displays.
    - o **Household Type**: select best match (green arrow). In this scenario **Female Single Parent** is the best match.
    - o Immediately below is **Client Search**.
    - o Since you know the daughter's HMIS ID (it is displayed in **Recently Viewed**)
    - o Scroll down **Client Number**. Enter the daughter's HMIS number (**2304**).
    - o Click **Submit**.





Updating Clients in a Household: Review

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



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

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

Click **Continue**.

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

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

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

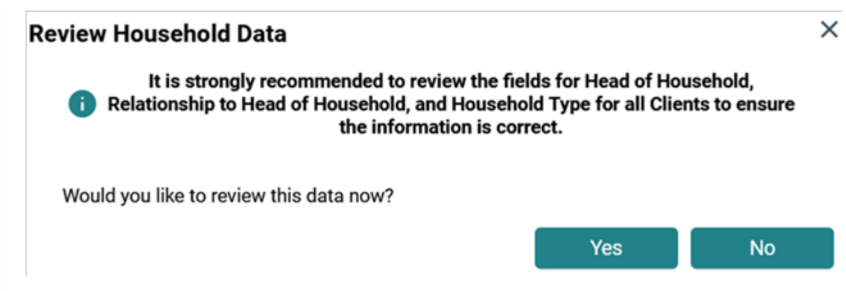
- **Head of Household**: select **No**.
- **Relationship to Head of Household**: select **Daughter**.

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

Updating Clients in a Household: Review

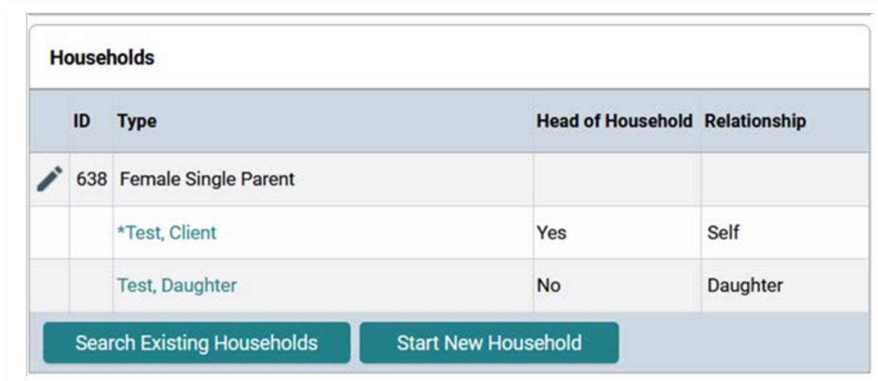
The **Review Household Data** displays.

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



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

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



Updating Clients in a Household: Adding a New Member

Households change over time. Correctly entering that change if the household is currently enrolled in one or more projects can be tricky.

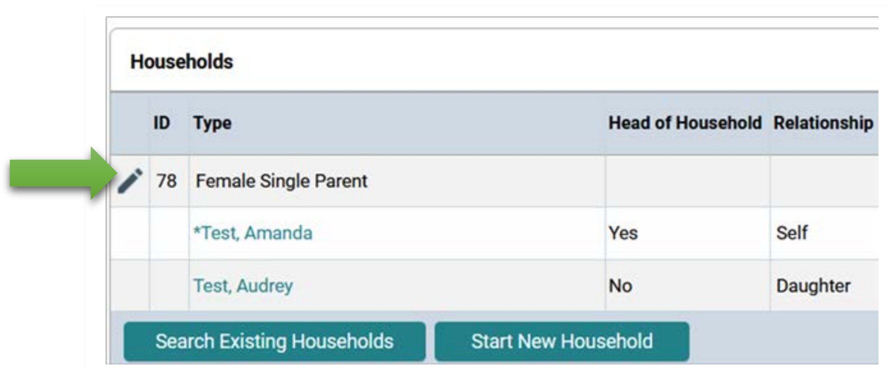
If you need assistance, submit a help request at:
https://ctagroup.org/santa-barbara-hmis/help-desk-request/

Scenario 1: The household is enrolled in your project and a **new member needs to be added**.
Scenario 2: The household is enrolled in your project and **at least one member leaves the household**.

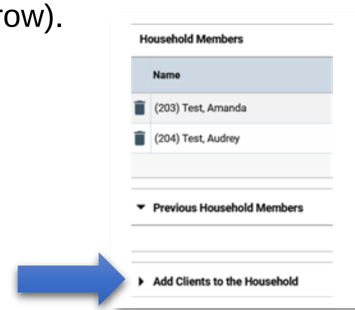
Scenario 1: Adding a new member
In this scenario, **Brandnew Test** (205) is joining the household of **Amanda Test** (203). **Amanda Test** is the head of household.

Best Practice: Add the new member from the head of household's Profile.

- Go to **Amanda Test** (203) Profile.
- Scroll down to the **Households** box.
- Click pencil icon to left of **Household ID** (green arrow)



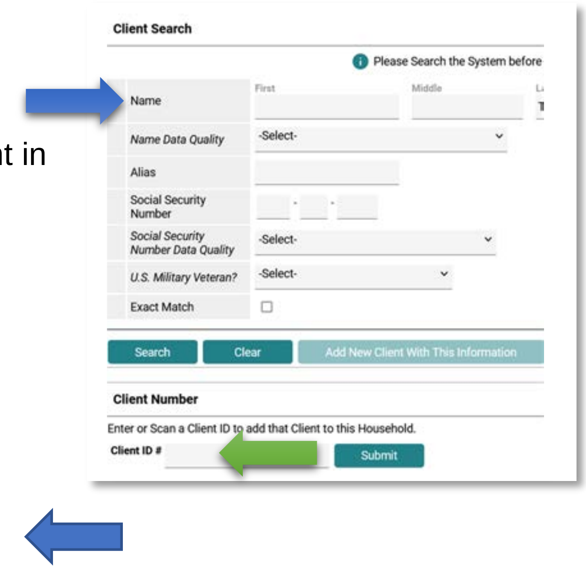
- **Household Information** box displays.
- Click **Add/Delete Household Members**.
- Click **Add Clients to the Household** (blue arrow).



Updating Clients in a Household: Adding a New Member

The **Client Search** page displays. Since we know the HMIS ID number of **Brandew Test**, enter 205 in **Client Number** (green arrow).

- Click **Submit**.
- **<u>Don't know the HMIS ID number for the client</u>?** Search for the client in Client Search (blue arrow).
- **Brandnew Test** will appear in **Client Results**.
- Click **Continue.**
- **Household Members** display with **Brandnew Test** in the household (orange arrow).



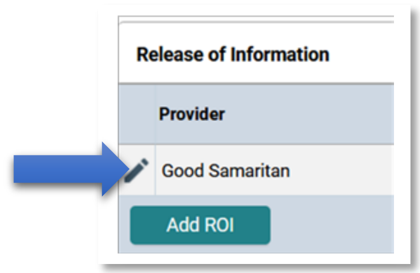
- **Relationship to Head of Household**: select best match. In this scenario, **Husband and Father** will be selected.
- **Joined Household**: defaults to today's date. Change if necessary.
- Scroll down to bottom of page. Click **Save & Exit**.
- You will be returned to the head of household's **Profile** page.

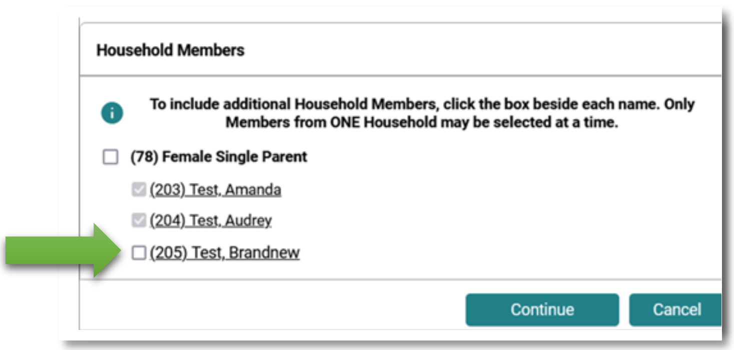
Updating Clients in a Household: New Member: Updating the ROI and Case Manager

Next steps: update **ROI** and **Case Manager** to include the new household member.

Update the ROI

- Click the pencil icon on the existing **ROI** (blue arrow)
- Click **Include Additional Household Members**
- Click box of new member to add (green arrow).





Click **Continue**.

Click **Save Release of Information**.

Update Case Manager

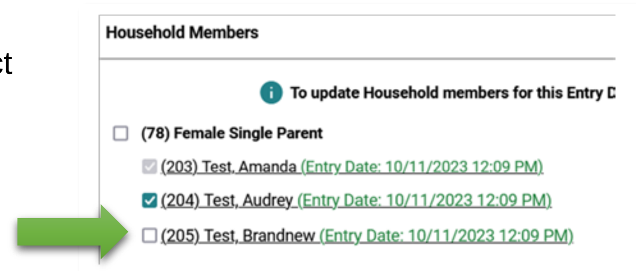
- Scroll down to the **Case Manager** box.
- Click pencil icon to left of your name or the name of another case manager in your project (orange arrow).
- Click **Include Additional Household Members**.
- Click box of new member to add.
- Click **Continue**.
- Click **Save Case Manager**.

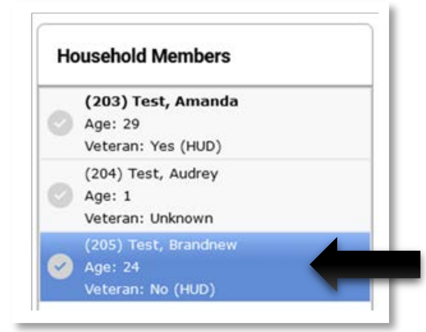
Updating Clients in a Household: New Member: Updating the Program Entry

<u>Forget to include all household members in the project entry</u>?
Note: this assumes all household members have the same project entry date.

To add one or more household members:

- Go to the head of household's **Profile** page.
- Locate the **Entry/Exits** box. Click on the pencil icon of the project entry to update.
- If the member(s) to add are displayed, click on the box (green arrow). A check mark will display.
- Click **Save & Continue**.
- Scroll down until the Household Members box displays.
- Click on the member added to the project entry (black arrow).
- The client's **Intake Assessment** will display.
- Enter data as needed.
- Click **Save & Exit** when done.





<u>What if the member's name does not display</u>?
This means the member has not been added to the household.

- To add the member to the household: Follow the steps outlined in **Adding a New Member** (page 14).
- Then follow the step as outlined in **Forget to include all household members in the project entry?** (this page).

Updating Clients in a Household: New Member: Updating the Program Entry

What if a member needs to be added to an entry but the member joined the household after the entry was created?

Scenario

- A two-member household was enrolled in a project with an entry date of 10/11/2023. A 3rd member joined the household on 10/19/2023.
- It is not possible to have 2 different dates for a project entry.
- If you add this 3rd member to the existing entry, their entry would have to be 10/11/2023.
- If you add the 3rd member to the 10/11/2023 entry, then try to change their entry date to 10/19/2023, then the other two members' entry date will automatically change to 10/19/2023.

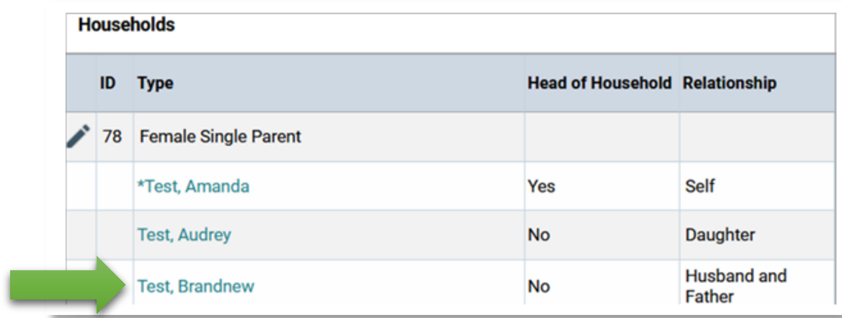
Best Practice in this type of scenario:

- Go to the head of household's **Profile** page. Follow instructions on page 14 for adding a new household member.
- Then go to the **Entry/Exits** box and exit the 2-member household from the project they were entered into on 10/11/2023.
- In our scenario, this 3rd member joined the household on 10/19, so the project exit will be dated 10/18/2023.
- Create a new project entry for the 3-member household for the next day. In our scenario the entry date will be 10/19/2023.

Updating Clients in a Household: Removing one or more members

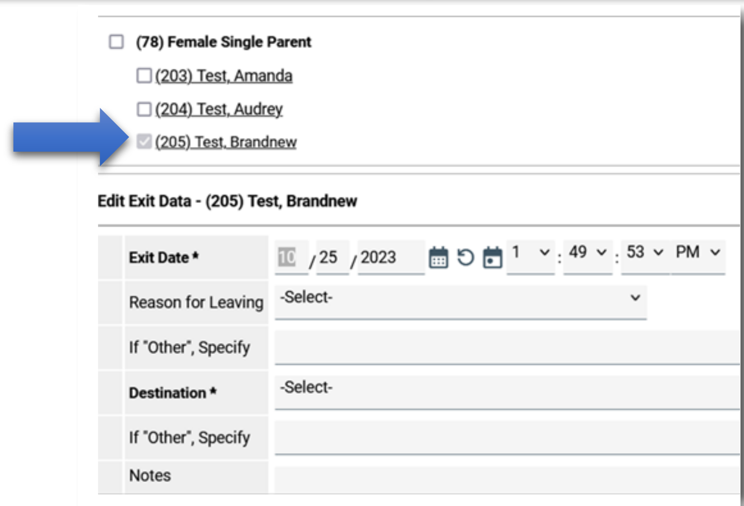
After enrolling the household in your project, one or more members may leave that household while the remaining household members remain in your project. To remove one or more members from a household:

- Access the head of household’s **Summary** page.
- Scroll down to the **Households** box.
- In this example, **Brandnew Test** (green arrow) is leaving the household.



- Click on his client’s name (green arrow). Client’s **Profile** page will display.
- Locate the **Entry/Exits** box. In this example, the client is leaving the program with a **Project Start Date** of 10/19/2023 (black arrow).
- Click on the pencil icon in the **Exit Date** column (orange arrow).

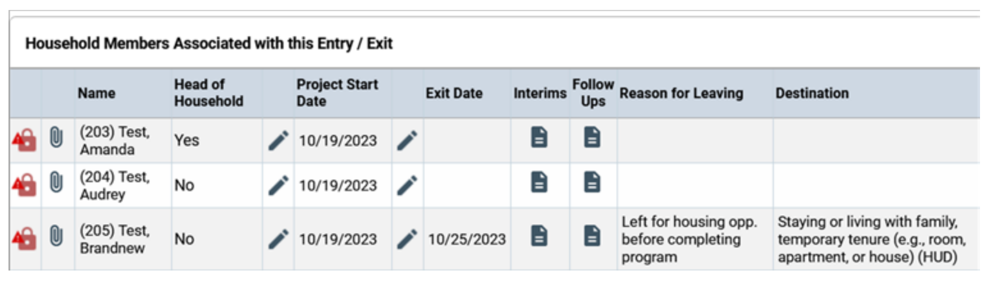
- <u>**Make sure the only boxed checked is the client who is leaving**</u> (blue arrow).
- **Exit Date**: defaults to today’s date. Change if needed.
- **Reason for Leaving**: select best match.
- **Destination**: select best match.
- **Notes**: optional.
- Click **Save & Continue**.



Updating Clients in a Household: Removing one or more members

The **Household Members Associated with this Entry/Exit** displays.

- <u>If an Exit Assessment displays, review the data in the assessment. Update as needed</u>.
- Click **Exit**.
- You will be returned to the client's **Profile** page.

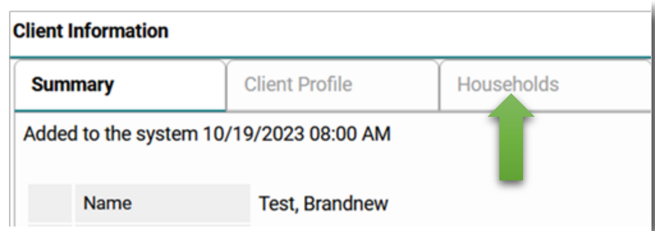


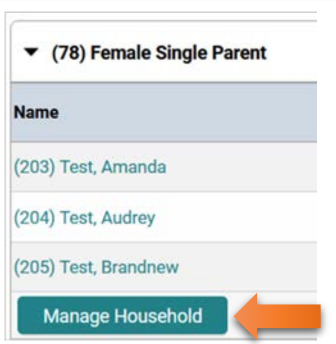
Household Members Associated with this Entry / Exit

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination
(203) Test, Amanda	Yes	10/19/2023					
(204) Test, Audrey	No	10/19/2023					
(205) Test, Brandnew	No	10/19/2023	10/25/2023			Left for housing opp. before completing program	Staying or living with family, temporary tenure (e.g., room, apartment, or house) (HUD)

<u>To remove the client from the household</u>:

- Click the **Households** tab (green arrow).
- Click **Manage Household** (orange arrow).

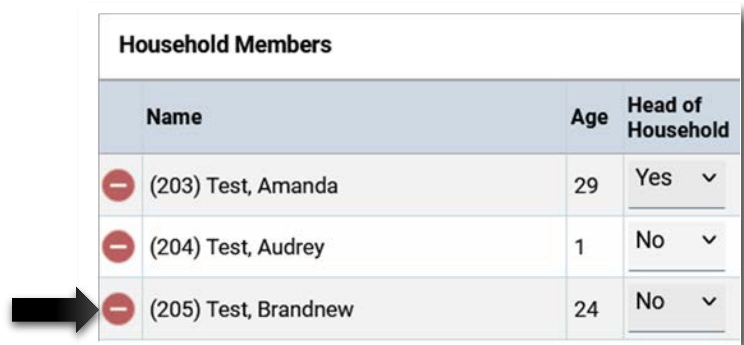




The Household will display.

Click **Manage Household** (orange arrow).

Click the red circle to left of client's name (black arrow).



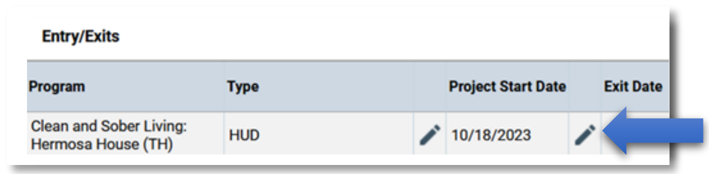
Household Members

Name	Age	Head of Household
(203) Test, Amanda	29	Yes
(204) Test, Audrey	1	No
(205) Test, Brandnew	24	No

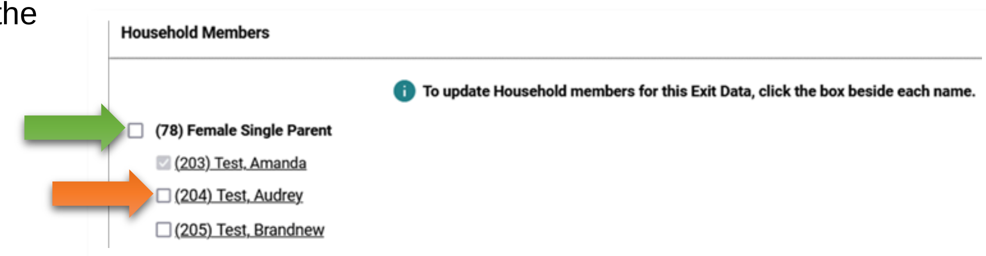
Project Exit

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

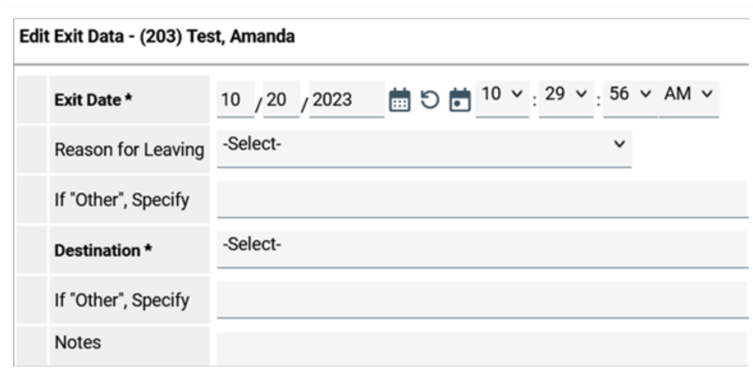
- Go to the head of household's **Profile**.
- Locate the **Entry/Exit** to create the **Exit**.
- Click the pencil icon in the **Exit Date** column (blue arrow).



- **Household Members**: Only the head of household (Amanda Test) is selected.
- **<u>To include all members</u>**: click box for the type of household (green arrow) to select all other listed household members.
- **<u>To include some but not all other household members</u>**: click the box for each other member to include. Example: to add only Audrey Test (orange arrow).



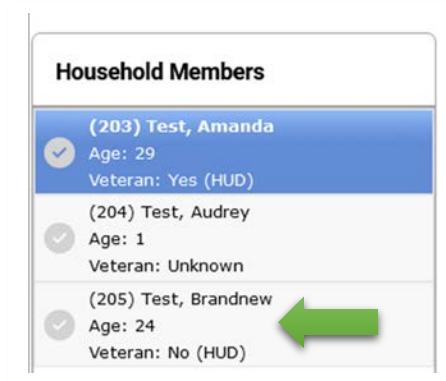
- **Exit Date**: defaults to today's date. Change if necessary.
- **Reason for Leaving**: select best match.
- **Destination**: select best match.
- Click **Save & Continue**.
- The **Exit Assessment** displays. Review and update the assessment as necessary.



- **Need to update another member's assessment?** Go to next page.
- **No need to update another member's assessment?** Click **Save & Exit**.

Project Exit

If your client is in a household, the other Household Members will display on the left hand side of the screen.



Do I need to update the other household members?

- **Yes**, **<u>If</u>** the household member is an adult **<u>AND</u>** something has changed in their life.
- **To update:** click on client's name. In this example, **Brandnew Test** (green arrow). Their Exit Assessment will display. Update as necessary.

<u>Do I need to update a child's assessment</u>?

The answer is No.

If it necessary to update the Exit Assessment for any adult(s) in the household, and you have completed all updates:

- Click **Save & Exit**.