DRAFT 6/10/13

HMIS
County of San Bernardino
Homeless Management Information System

HMIS Agency User Guide

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INTRODUCTION TO HMIS

Homeless Management Information System (HMIS)

The County of San Bernardino (SBC) Homeless Management Information System (HMIS) is an electronic data collection system that tracks client demographic and service information on homeless and at-risk households served by participating service agencies in the Continuum of Care. The SBC HMIS is designed to comply with the Department of Housing and Urban Development's (HUD) data collection, management, and reporting standards and used to collect client-level data and data on the provision of housing and services to homeless individuals and families and persons at-risk to homelessness. HUD and other planners and policymakers at the federal, state and local levels use aggregate data to obtain better information about the extent and nature of homelessness over time. Specifically, HMIS can be used to produce an unduplicated count of homeless persons, understand patterns of service use and measure the effectiveness of homeless programs.

Who Should Participate in HMIS?

All recipients of HUD funding for the provision of services to homeless individuals and families and those at-risk to homelessness are required to participate in HMIS. This includes recipients of funding through the Continuum of Care Program (CoC) [includes Supportive Housing Program (SHP), Shelter Plus Care (S+C), and Section 8 SRO Moderate Rehab], Emergency Solutions Grant (ESG), Housing Opportunities for Persons with AIDS (HOPWA) and Veteran's Affairs Supportive Housing (VASH). In addition, HUD strongly encourages participation from agencies that receive funding from other federal programs that serve homeless persons.

Benefits of HMIS Participation

- Provides unduplicated client service information
- Decrease in duplicate intake and assessment and better service coordination
- Tracks services used by homeless persons and service usage over time from multiple agencies
- Improve agency and CoC effectiveness through tracking client outcomes
- Prepare mandated program and financial reports

HMIS Lead Agency

The County of San Bernardino Office of Homeless Services (OHS) is the lead agency responsible for the administration and oversight of the CoC HMIS. OHS has the "responsibility to establish, support and manage HMIS in a manner that will meet HUD's standards for minimum data quality, privacy, security, and other requirements for organizations participating in HMIS." OHS is dedicated to providing the best possible, highest quality HMIS to enhance the delivery of services for persons experiencing homelessness. OHS will improve data collection, advance the provision of quality services for homeless persons, and promote more responsive policies to end homelessness in San Bernardino County. Specifically, OHS will:

- Facilitate the coordination of service delivery for homeless persons;
- Enable agencies to track referrals and services provided, report outcomes, and manage client data using accessible, user-friendly and secured technology; and
- Enhance the ability of policy makers and advocates to gauge the extent of homelessness and plan services appropriately throughout San Bernardino County.

OHS's goal is to go beyond the HUD mandate of producing unduplicated counts of homeless persons. Our charter is to provide a comprehensive case management system that allows the user to use the collected information to make informed program decisions. The selected software includes a focus on Outcomes Management which is intended to provide value by allowing the user to set and measure client and program milestones and target achievements.

HMIS END-USER RESPONSIBILITIES

An HMIS End-User is a person who has unique user identification (ID) and directly accesses SBC CoC HMIS to assist in data collection, reporting or administration as part of his/her job function in homeless service delivery. All HMIS End-Users are responsible to:

- Complete training on the appropriate use of SBC CoC HMIS prior to accessing the system.
- Acknowledge an understanding of the HMIS Policies and Procedures Manual.
- Adhere to any agency policies that affect the security and integrity of client information.
- Is responsible for SBC CoC HMIS Data Quality. Data quality refers to the timeliness of entry, accuracy and completeness of information collected and reported in HMIS.
- Sign **HMIS End-User Agreement** and any other required forms prior to accessing system.
- Report system problems and data-related inconsistencies to Agency Administrator or Outcome Manager as appropriate.
- If applicable, obtain client signature on **Client Consent/Information Release Form**.
- Give client written copy of **Statement of Client Rights.**
- Verbally communicate client's rights and uses of client's data.

User Activation

The HMIS System Administrator will set up a unique user name and temporary password for each end-user upon completion of training, receipt of the signed **HMIS End-User Agreement** and acknowledgement of the Policies and Procedures Manual from each user via the Agency Administrator. User names will be unique for each user and will not be shared with other users. The sharing of user names will be considered a breach of the **HMIS End-User Agreement**.

Following the initial End-User training, each user will need to change their temporary password to a unique personal password. Passwords must be no less than eight and no more than sixteen characters in length, and must be alphanumeric with upper and lower case and special characters.

- **Forced Password Change (FPC):** The FPC will occur every one hundred and eighty (180) consecutive days. Passwords will expire and user will be prompted to enter a new password. Users may not use the same password consecutively, but may use the same password more than once.
- **Unsuccessful logon:** If a User unsuccessfully attempts to logon three times, the User ID will be "locked out", access permission revoked and user will be unable to gain access until his/her password is reset by the HMIS System Administrator in the manner stated above. Agency Administrators will contact the HMIS System Administrator to reset a user's password.

CLIENT RIGHTS, CONFIDENTIALITY AND INFORMED CONSENT

Clients served by agencies participating in the SBC CoC HMIS have a right to privacy and confidentiality. Every client has a right to an understandable explanation of SBC CoC HMIS and what "consent to participate" means. All clients shall be provided an oral explanation stating their information will be entered into a computerized record keeping system. The Participating Agency will provide an oral explanation of SBC CoC HMIS, the terms of consent and secure client consent through the **Client Consent and Information Release**. The agency is responsible for ensuring that this procedure takes place prior to every client interview. See HMIS Policies and Procedures for more specific guidance.

Client information may not be shared without informed consent. Each client whose program level information is shared with another Participating Agency must agree via the **Interagency Data Sharing Agreement.** A client must be informed as to what information is being shared and with whom it is shared.

Data Sharing

Data sharing refers to the sharing of information between Participating Agencies for the coordination of case management and client service delivery. Basic client information in the Central Intake includes:

- Demographics, Income and Household members
- Education/Employment
- Scanned Documents

Program level information in either electronic or paper form will never be shared outside of originating agency without written client consent. Information that is shared with written consent will only be used for the purpose of service delivery, such as:

- Shelter stays
- Food
- Clothing
- Transportation
- Employment
- Housing
- Childcare
- TB clearance status
- Utilities assistance
- Life-skills sessions

DATA QUALITY

HMIS users are responsible for ensuring data quality. Data quality refers to the timeliness, accuracy and completeness of information collected and reported in SBC CoC HMIS. All Participating Agencies agree to enter, at a minimum, HUD required universal data elements.

HMIS data quality refers to the extent that data recorded in the SBC CoC HMIS accurately reflects the same information in the real world. Participating Agencies need to adopt HUD's data quality standards in order to help SBC CoC better understand and address homelessness in San Bernardino County. Data quality refers to the timeliness, accuracy, completeness and consistency of information collected and reported in SBC CoC HMIS.

- **Data Timeliness:** To be most useful for reporting, an HMIS should include the most current information about the clients served by participating homeless programs. To ensure the most up to date data, information should be entered by the user as soon as it is collected. Intake data needs to be added within two working days of the intake process or client encounter. Information that tends to change periodically also needs to be regularly verified and/or updated, such as information on income sources and amounts.

- **Data Accuracy:** Information entered into the HMIS needs to be valid, i.e. it needs to accurately represent information on the people that enter any of the homeless service programs contributing data to the SBC CoC HMIS.
- **Data Completeness:** To release meaningful information from the SBC CoC HMIS, data needs to be as complete as possible, i.e., it should contain all required information on all people served in the program (i.e., emergency shelter) during a specified time period. On the macro level, the goal of achieving adequate HMIS coverage and participation by all local programs is essentially about ensuring that the records are representative of all the clients served by these programs. If a client record is missing, then aggregate reports may not accurately reflect the clients served by the program. Similarly, if an entire program is missing, data from the SBC CoC HMIS may not accurately reflect the homeless population in the community.
- **Data Consistency:** HMIS end-user must have an understanding of what data needs to be collected and in which way. Different interpretations of how questions for data collection should be asked or a lack of understanding of what answers to questions mean lead to aggregate information that cannot be correctly interpreted and presented.
- **Universal Data Elements:** The universal data elements shall be collected by all HMIS participating agencies serving homeless persons. Data collected by all HMIS participants are those essential to the administration of local CoC programs and to obtaining an accurate picture of the extent, characteristics and patterns of service use within the CoC. The universal data standards are the basis for producing unduplicated estimates of the number of homeless people accessing services from homeless assistance providers, basic demographic characteristics of people who are homeless, and their patterns of service use. The universal data standards also allow measurement of the number and share of chronically homeless people who use homeless services. The standards will enable generation of information on shelter stays and homelessness episodes over time. These data elements are critical to meeting the Congressional mandates for HMIS, therefore, all providers participating in the SBC CoC HMIS are required to collect the universal data elements from all homeless clients seeking housing or services.

  The universal data elements are:

  - Name
  - Social Security Number (SSN)
  - Date of Birth (DOB)
  - Race
  - Ethnicity
  - Gender
  - Veteran Status
  - Disabling Condition
  - Residence Prior to Program Entry
  - Zip Code of Last Permanent Address
  - Housing Status
  - Program Entry Date
  - Program Exit Date
  - Unique Person Identification Number (System generated)
  - Household Identification Number (System generated)

Program-Specific Data Elements: Program-Specific Data elements provide information about the characteristics of clients, the services provided, and client outcomes. These data elements must be collected from all clients served by programs that are required to complete Annual Performance Reports (APRs) for HUD. Specifically, this includes all programs that receive funding through HUD's Continuum of Care Program (the Supportive Housing Program, Shelter Plus Care, and Section 8 Moderate Rehab SRO) and HOPWA-funded homeless programs. For programs with no such reporting requirement, collecting these data elements are highly recommended as they allow the CoC to obtain consistent information across a range of providers that can be used to plan service delivery, monitor the provision of services, and identify client outcomes.

The Program-Specific Data elements that are needed for HUD reporting include:

- Income and Sources
- Non-Cash Benefits
- Physical Disability
- Developmental Disability
- Chronic Health Condition
- HIV/AIDS
- Mental Health
- Substance Abuse
- Domestic Violence
- Destination
- Date of Contact (outreach projects)
- Date of Engagement (outreach projects)
- Financial Services Provided (homeless prevention and rapid re-housing programs)
- Housing Relocation & Stabilization Services Provided (homeless prevention and rapid re-housing programs)

Data Quality Assurance: To ensure HMIS data quality, HMIS System Administrator utilizes a variety of data quality monitoring reports that identify missing universal data elements including program entry and un-exited clients. Program entry and exit dates are validated against paper records from HMIS participating agencies.

Technical Support and System Availability

Technical support
The Office of Homeless Services (OHS) will provide technical support to all Agency Administrators and HMIS End-Users as needed.

Technical Support Hours: 8:00 a.m. – 4:00 p.m., Monday through Friday (excluding holidays).

OHS staff will respond in a timely manner to any requests for support made during the above hours. For technical support, contact:

System Administrator/Automated Systems Analyst
James Rosemeyer
Phone: (909) 386-1943
FAX: (909) 386-1982
Jim.Rosemeyer@dbh.sbcounty.gov
DBH-HMIShelpdesk@dbh.sbcounty.gov

Assistance will be provided in the following areas:

- **Help Desk Support:** Help Desk support is provided to help Homeless Management Information System (HMIS) End-Users access and utilize the San Bernardino County Continuum of Care (SBC CoC) HMIS, including technical support for installed SBC CoC HMIS computer system.
- **Trainings:** User training, Outcome Management training, Data Quality, Reporting
- **System Customization:** SBC CoC HMIS contains certain fields that can be tailored at no cost to the agency.
- **Reporting:** Training and technical assistance in accessing standardized reports and the creation of ad hoc (custom reports).
- **Data Analysis:** Interpreting reports

Every HMIS End-User will receive a copy of the HMIS Agency User Guide.

HMIS information and resources, including important announcements, required forms, training documents, etc., can be found on HMIS page of the San Bernardino County Homeless Partnership website – www.sbcounty.gov/dbh/sbchp.

INTRODUCTION TO AES ENGINUITY

Adsystech Enterprise Solutions (Enginuity) is a centralized web-enabled application that gives your organization the necessary tools to manage your Customers as well as associated services and activities. Our next-generation software delivers a fully integrated enterprise solution to better serve your needs.

Understanding the **Central Intake** process is essential to fully realize the benefits of Enginuity.
After reviewing this guide, you will be able to do the following tasks:

- Create a new Customer in the system;
- Record all relevant household information, including contact, demographics, and income details;
- Upload and manage client documents; and
- Update information on existing Customers.

The New Client Intake page collects all information and gives visual clues when the customer is missing required information and is ready for Program entry. Once you complete the Customer Intake process, you will be prepared to take the next steps to provide Customers with all the services and programs offered by your Organization.

Understanding the **Agency Services** processes and functions is essential to fully serve your Customers. After reviewing this guide, you will be able to do the following tasks:

- Search for a Customer by Program and search for your caseload;
- Enroll a Customer in a Program and record Program specific information about Customer;
- Record Activities and Milestones Completions for a Customer;
- Upload and Manage Documents and Record Case Notes;
- Create, respond to, and view Referrals; and
- Update Customer Income Snapshot.

The Agency Services Pages gives you the tools to provide assistance and direction to your customers. Use these pages to help identify the services and programs that your customer needs. These pages allow you to take steps to improve a Customer’s current situation by addressing immediate needs and setting long-term goals. The Programs and Services Pages help you maintain an on-going Customer relationship to better evaluate the effectiveness of the services and programs you offer. They provide a central point of contact for Customer information and give caseworkers a holistic perspective of their Customers.

AUDIENCE

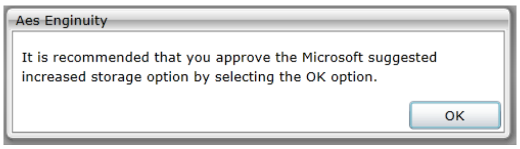
All users may use this guide as a reference. However, the functions detailed in this User Guide are most appropriate for the roles listed below.

Roles	
Intake Worker	Program Manager
Field Worker	Supervisor
Outreach Worker	Program Director
Case Manager	System Administrator
Case Worker	IT Director

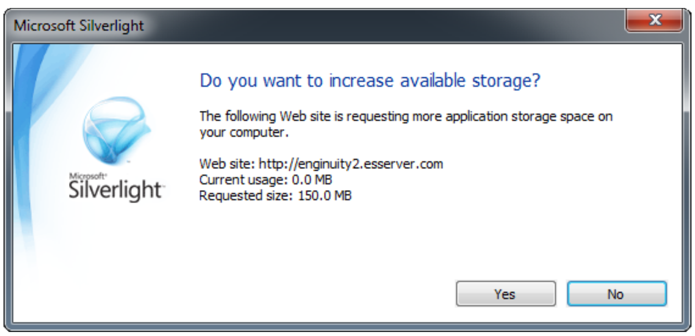
LOGIN

First Time Access

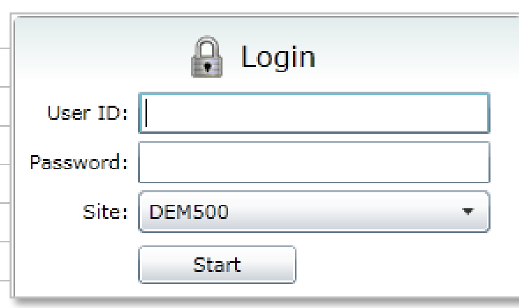
First time Users may be recommended to approve an increase in Storage, select **OK**.



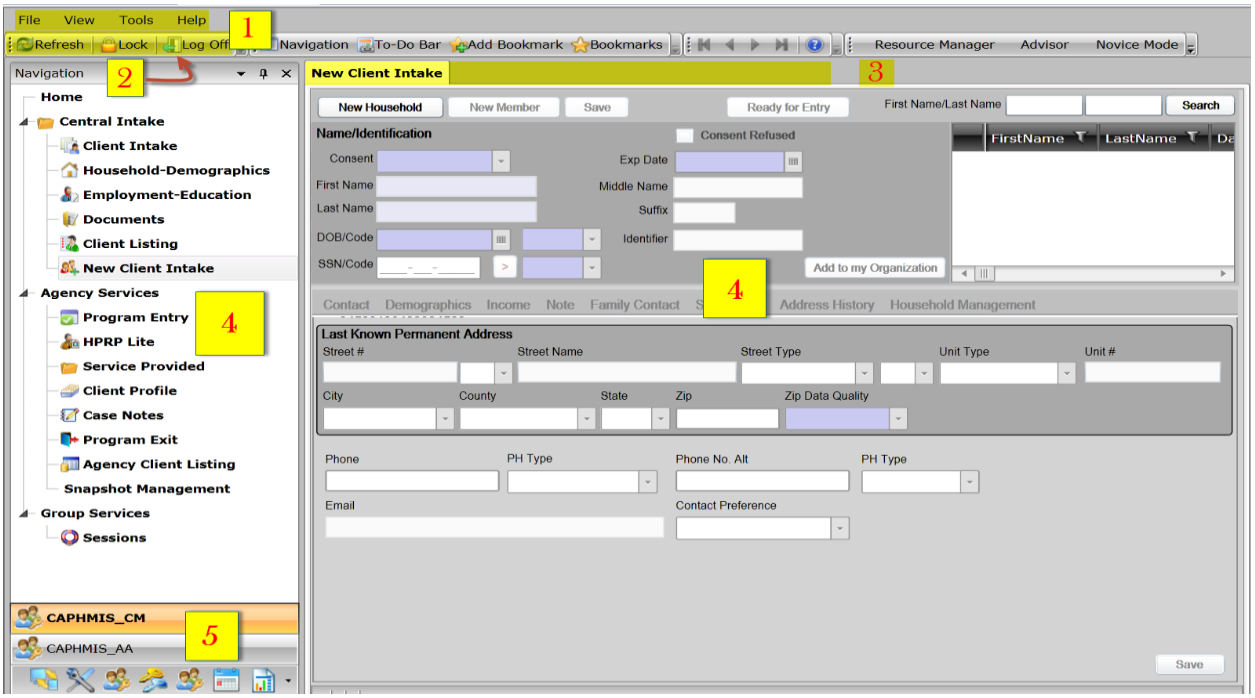
Microsoft Silverlight may ask to increase your available Storage, select **YES**.



Login from Internet Browser – *"In Browser Mode"*

Step	Notes
Open your Internet Browser window	*Internet Explorer, Google Chrome, Firefox are supported. If Silverlight is not installed, see Installing Silverlight.*
• Enter the SBC HMIS data portal **http://sbcHMIS.esserver.com**	
• In Login window, enter	
• User ID and password	
• Click **START**	
• An additional Group box may appear, if so:	
• Select your User Group	
• Click **START** again OR	
• Double click User Group name	

BASICS OF THE SCREEN



1 **Menu bar** allows password changes, options

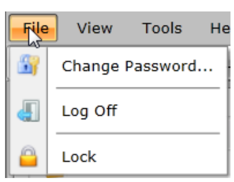
2 **Toolbar** buttons allow screen refresh, locking system, pane operation

3 **Tabs** allow switching between application, reports, resource manager

4 **Panes** two panes: Navigation & Application Page

5 **Role buttons** change available pages in Navigation pane

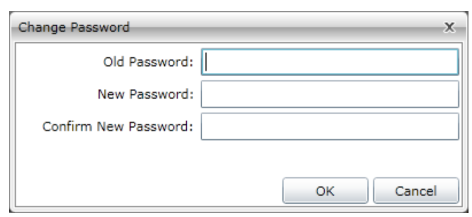
MENU BAR



File Menu

Change Password

Step	Notes
Enter Old Password	
• Enter New Password and confirm	
• Click **OK**	*Use Cancel to close window without changing password.*

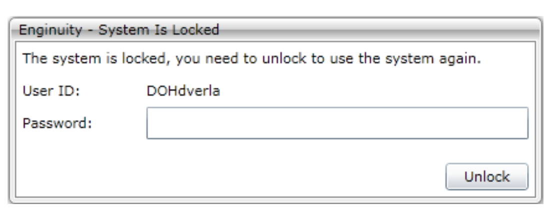


Log off logs you out of the system and returns to the Login page.

Lock

Use this function when you must leave your computer and do not want to leave the system up and available; it will hide the screen and show just a window asking for the User password.

Step
• Enter Password
• Click **UNLOCK**
After typing Password, system will reopen on Page that was active when Lock was selected



OVERVIEW - WORKFLOW

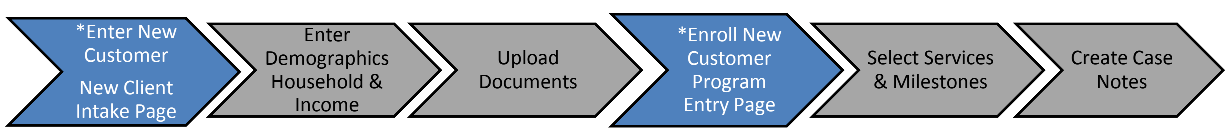
Entering a New Customer and *Updating an Existing Customer* are critical processes to ensure your organization serves its Customers appropriately and efficiently. Customer information must be accurate and current in order to fully utilize this application. The processes detailed below allow you to do the following:

- Capture and maintain Customer contact details;
- Manage relationships within a household;
- Record and maintain Customer income details;
- Upload and access Customer documents;
- Prevent duplicate records from being created.

Create New Customer

This process allows you to accurately record your Customers' data. Subsequently, depending on consent, members of your department and organization will have access to this information so that they may better serve your Customers.

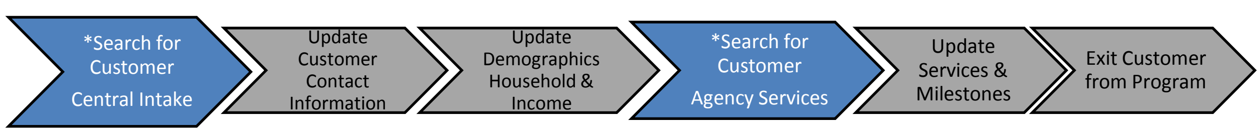
After completing this process you will have created a new Customer record and captured all relevant Customer information.



Update Existing Customer

This process allows you to maintain changes to Customers' contact, income, employment, and family information. You may also update documents and create additional eligibility assessments and referrals as necessary. Current Customer data improves the efficiency and accuracy of your Organization's service delivery process.

After completing this process, you will have updated your Customer records.

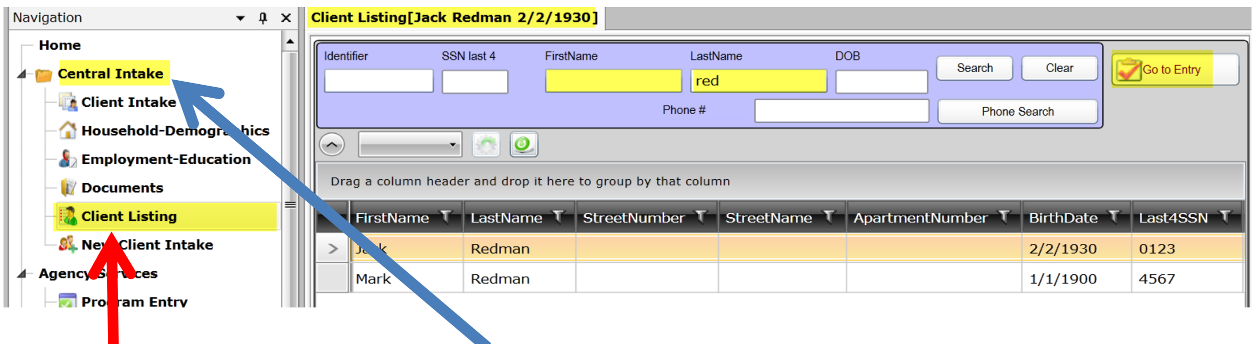


ENTER NEW CUSTOMER

Central Intake

Client Listing Page

Before entering a new Customer, you must first identify if the Customer already exists in the system in order to prevent duplicate records from being created. The Client Listing Page will search records for the entire Continuum of Care to help identify if your Customer already exists in the system. You may wish to enter only a few letters from your Customer's first and last name in order to conduct the broadest search possible (for example, you may discover your Customer in the system with their name spelled in a different way)



The **Client Listing** is found under the Central Intake heading and is the central starting location for client lookup. The Go to Entry button will open the program Entry page which will be covered later.

Search for a Customer

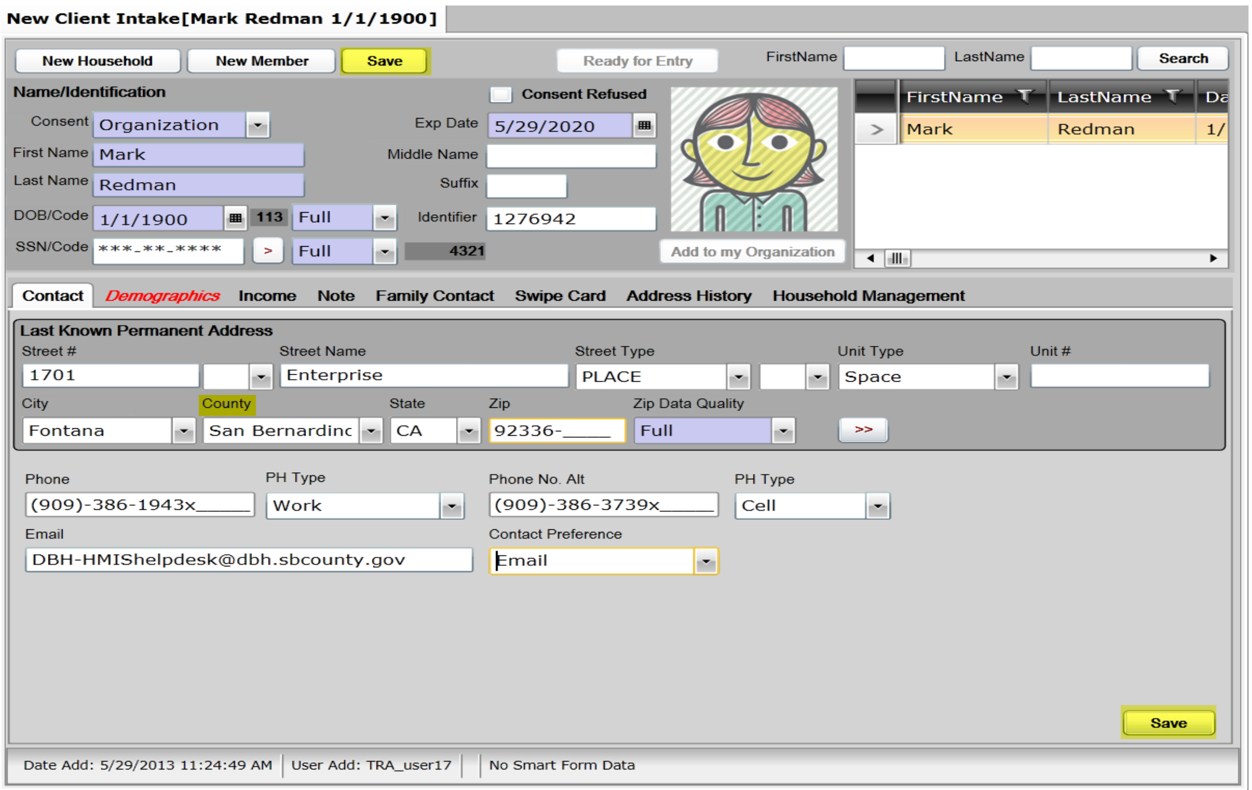
#	Step	Notes
1	Click on **Client Listing Page**	
	Enter Customer's First Name and Last Name in the top container of the page	*You do not need to enter the complete name. You may also enter SSN last 4, or DOB.*
	Click **SEARCH**	*Potential Customer matches will be displayed in grid below.*
	• If a potential Customer match is found, highlight the Customer then click **New Client Intake page**	*Existing Customer information will appear on the page. If Customer record was added by a different organization, it will appear Read-Only (greyed out). Click the ADD TO MY ORGANIZATION button to access the record.*
	• If no potential match is found, go to **New Client Intake page** to enter new customer in system	

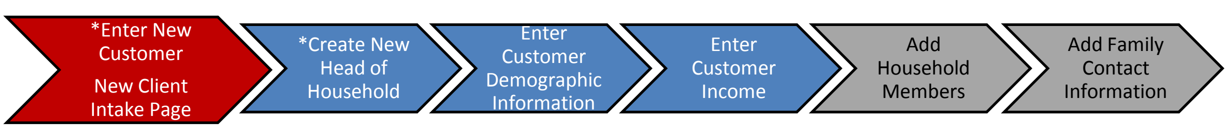
New Client Intake Page

In order to provide and track services for a Customer, you must first create a record in the system specific to each Customer. The system will automatically search for matching records after First Name, Last Name and Date of Birth are entered and again after the Social Security Number is entered. All potential matches will be displayed in a popup window.

Tabs are available in the middle of the page to collect additional information. If required information is missing, the Tab Title will turn red. When all required information is collected, the Ready for Entry button at the top of the page will become available.

If your Customer has already been entered into a Program, you may be prompted to update an existing Snapshot record when updating information. If the Customer record was added by a different Organization, it will appear Read-Only (greyed out), click the ADD TO MY ORGANIZATION button to access the record.





Create New Head of Household Customer

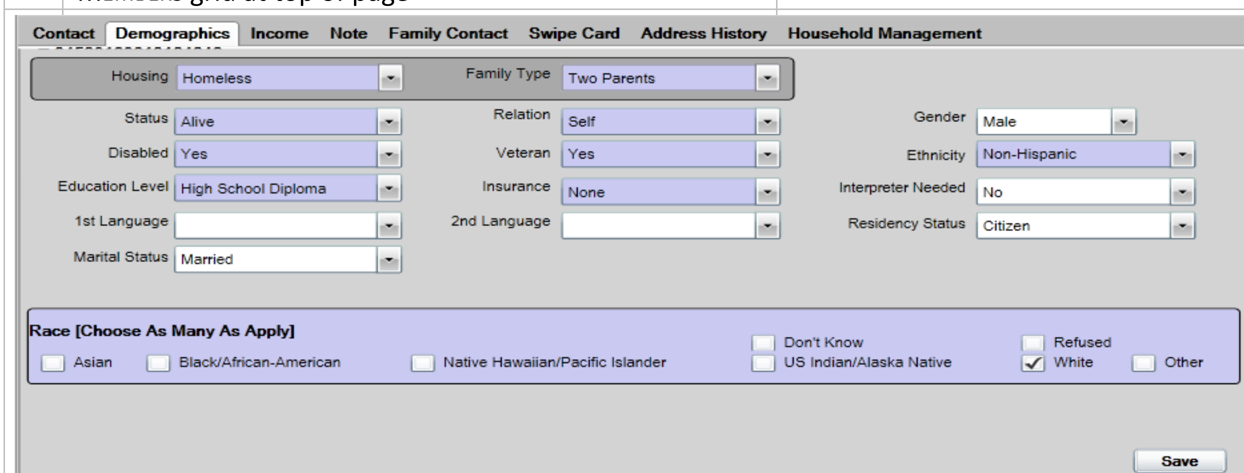
#	Step	Notes
1	Click **New Client Intake Page**	
2	Enter Customer Information	
	Click **NEW HOUSEHOLD** tab at top of page	

	Validate Consent	*Based on organizational rules.*
	Enter Customer Name	
	Enter Date of Birth	*Date must be in mm/dd/yyyy format.* *If there are existing Customers who match your entry, a popup window will display potential matches. Select the appropriate Customer record and click **SELECT;** if no match, click **CANCEL.***
	Enter SSN (Social Security Number)	*Select popup window will again display matches.*
	Enter SSN Code (Social Security Number Code)	*Refers to Social Security Number.*
3	Click **CONTACT** tab to enter contact information	
	Enter Last Known Permanent Address	*Street #, Street Name, Street Type are separate fields.* *Unit Type is entered only if address is not a single dwelling.* *Select an existing address by entering several letters or numbers of an address and click **SELECT ADDRESS.***
	Enter Zip Data Quality	*Refers to data in Zip Code field.*
	Enter Phone, Email and Contact Preference	
	Click **SAVE** after all required fields are entered	*Customer record will be displayed in HOUSEHOLD MEMBER GRID.* *Identifier is automatically filled after clicking SAVE.*

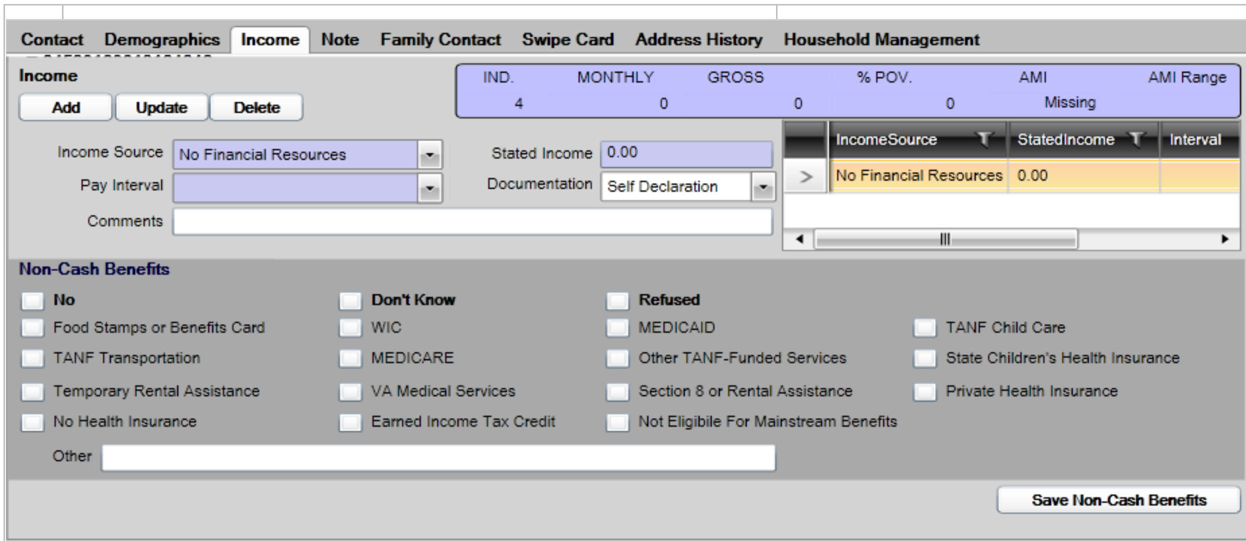
Add Demographic, Income and Household members

Enter Customer Demographic Information

#	Step	Notes
1	Make sure correct Customer is selected in HOUSEHOLD MEMBERS grid at top of page	



#	Step	Notes
2	Click **DEMOGRAPHICS** tab to record demographic data	
	Enter or select all demographic data	*Required fields are shaded blue.*
	Click **SAVE**	



Enter Customer Income Information

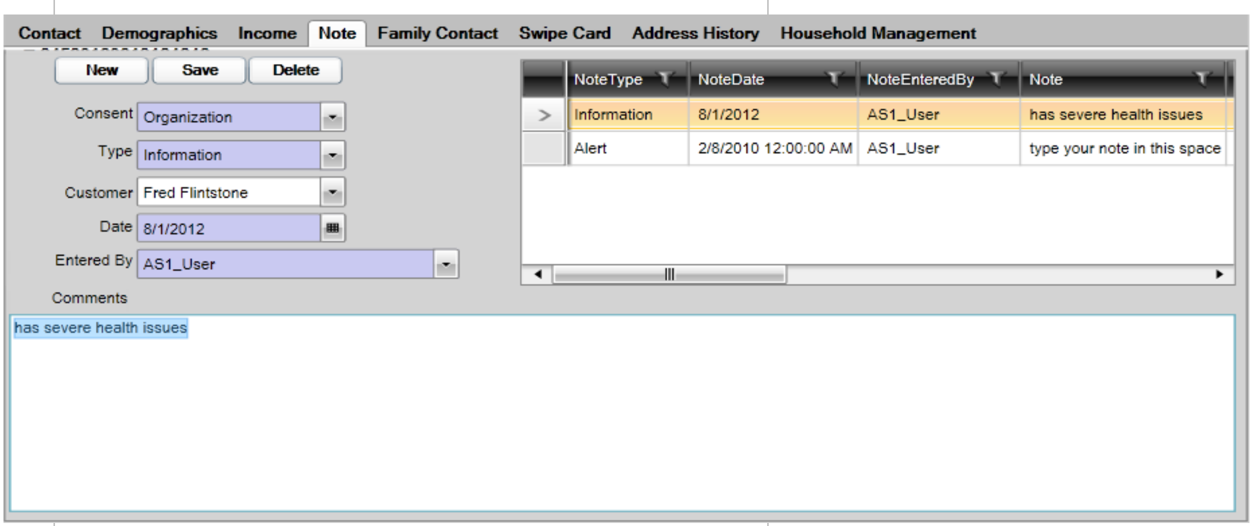
#	Step	Notes
1	Click **INCOME** tab to record income data	***Customer Income Source defaults to No Financial Resources.***
	Select Income Source	*If Customer has no financial resources, skip to Non-Cash step below.*
	Enter Stated Income	*Each income source must be associated to the household member who receives that income.*
	Select Pay Interval	
	Select Documentation	
	• Click **UPDATE**	
	• To add additional Income Source:	
	○ Click **ADD**	
	○ Select Income Source	
	○ Enter Stated Income	
	○ Select Pay Interval	
	○ Select Documentation	
	○ Click **UPDATE**	
	• Repeat for additional Income Source records	
	• Enter Non-Cash Benefit information	
	○ If Customer receives benefit, check all types received ○ Enter name of other type in Other field	*Id Customer does not know or refuses information, check appropriate box*
	○ If Customer does not receive benefits, check NO	
	○ Click **SAVE NON-CASH BENEFITS**	
2	Your customer may now be ready to enter into your Program; if there are other household members, continue with Add Household Members section below	*Tab titles will turn red if missing required information. If no Household Members, click **READY FOR ENTRY**.*

Add Household Members

#	Step	Notes
1	Add new HOUSEHOLD MEMBERS	
	Click **NEW MEMBER** tab at top of page	
	Enter Name/Identification information	
	Click **SAVE**	
2	Add Household Member Contact, Demographic and Income information	*Address information will stay consistent for all family members. Housing Type and Family Type will stay consistent for all family members.*
3	Repeat for additional Household Members	
4	When data is complete:	
	• Select Customer to enter into Program in top Household Members grid	
	• Click **READY FOR ENTRY**	*Program Entry page will open with Customer active.*

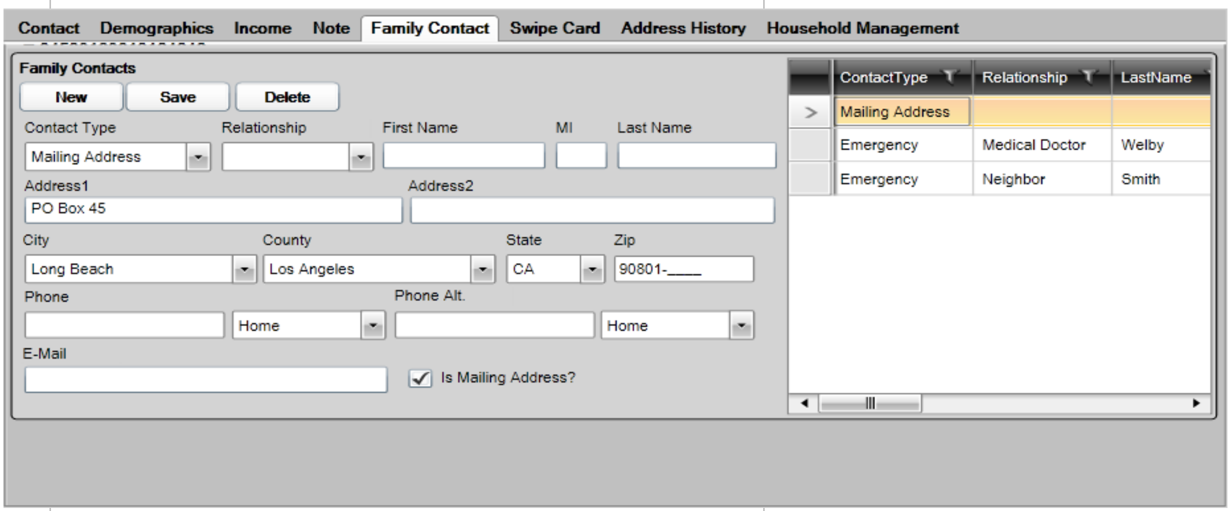
Add Optional information

#	Step	Notes
1	Make sure correct Customer is selected in Household Members grid at top of page	

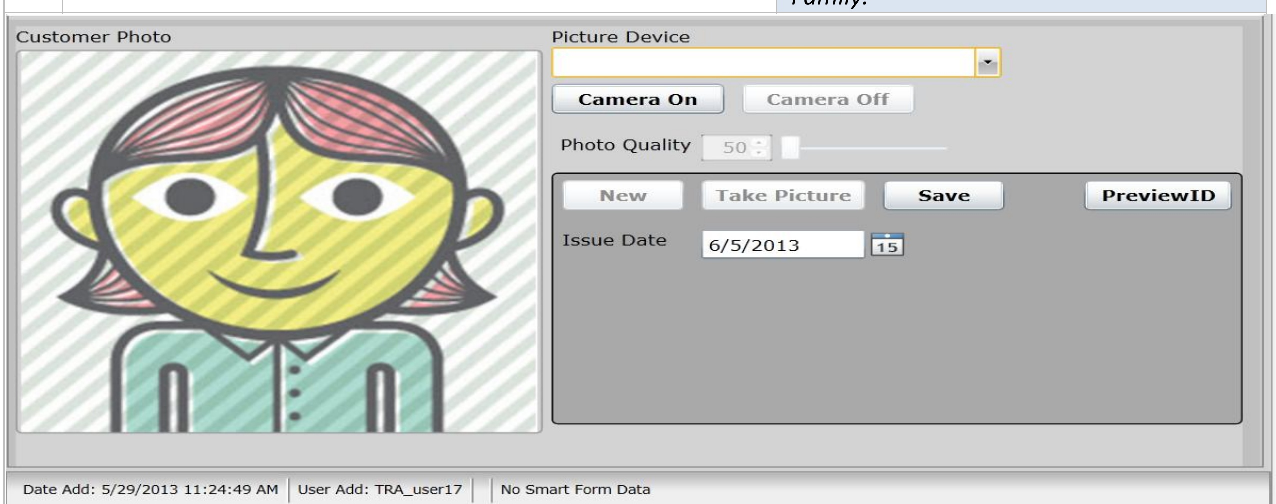


#	Step	Notes
2	Click **NOTE** tab to create Note	
	• Click **NEW**	*All Notes are displayed for all household members.*
	• Select Consent	*This determines who can view note.*
	• Select Type	*Alert flashes red ALERT at top of the page.*
	• Select Customer	
	• Select or enter Date	
	• Select Entered by User	
	• Type text of Note	

	• Click **SAVE** ○ Use **DELETE** to remove unwanted Note	

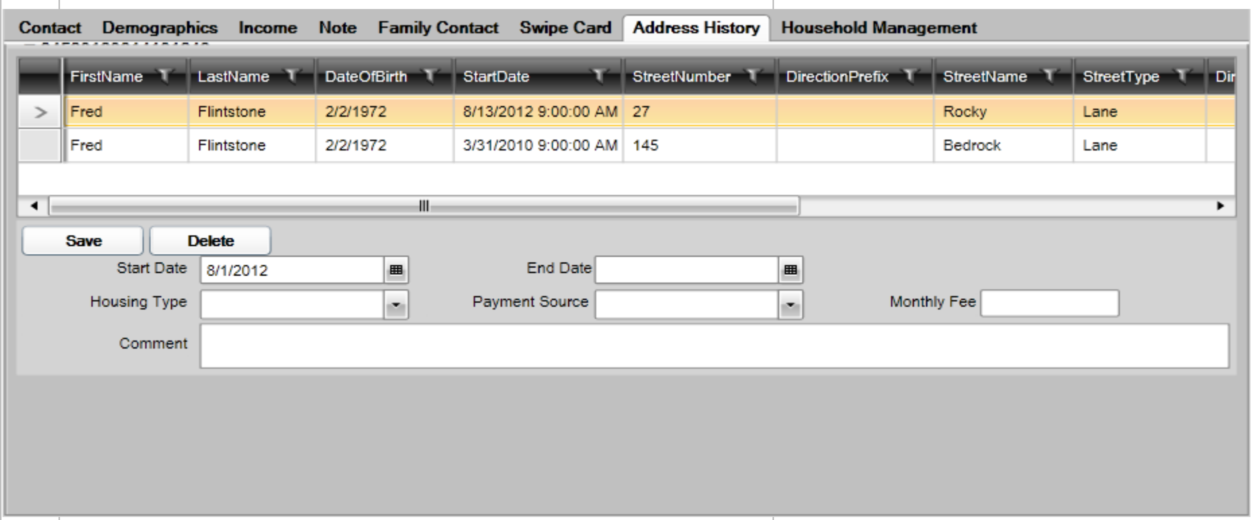


3	Click **FAMILY CONTACTS** tab to enter contacts	
	Click **NEW**	*Record Emergency Contacts here.*
	Enter all contact information	
	Click **Is Mailing Address?** if Customer mailing address is not the same as physical address	*Mailing Address will apply to all members of the Same Family, but not necessarily the entire Household.*
	Click **SAVE** after entering all information	*New Contact will appear in FAMILY CONTACTS grid to right.* *Multiple Contacts may be created for each Family.*

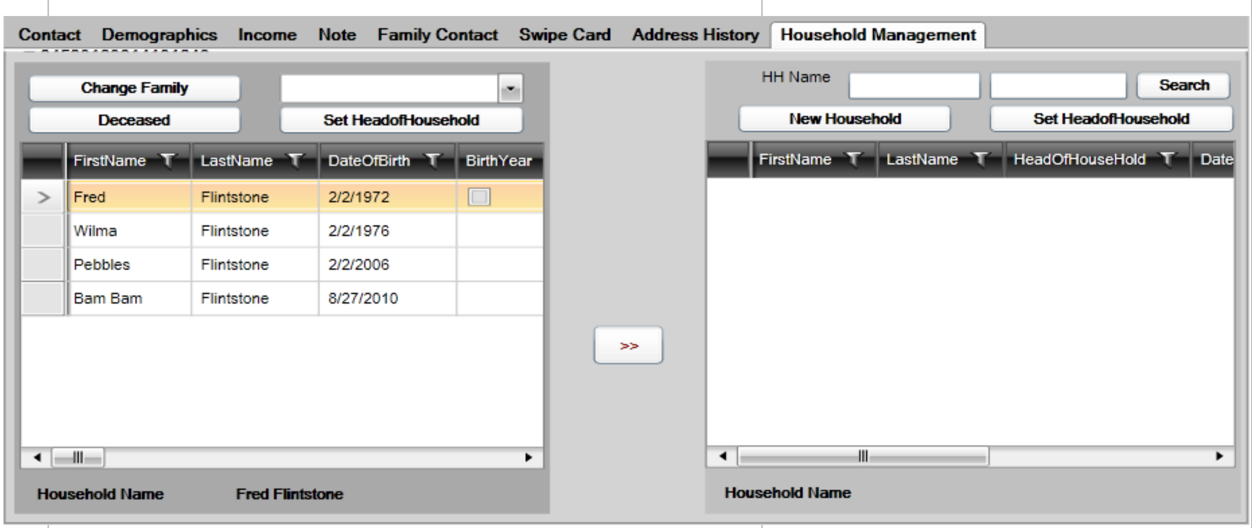


4	Click **SWIPE CARD** tab Create Swipe Card photo	*OPTIONAL FEATURE*
	• Select Picture Device	
	• Click **CAMERA ON**	
	• When ready, click **TAKE PICTURE**	
	• Select Issue Date	
	• Click S**AVE**	*Picture will be available on Documents*

		page with description = ID Photo.
	• Click **PREVIEW ID**	*Swipe Preview popup window will be displayed.*
	• Click **PRINT** when ready to print	*Print dialog box will be displayed.*
	• Click **CAMERA OFF** when finished	



5	Click **ADDRESS HISTORY** tab to view or edit address history	
	• Select Address record in Address History grid	
	• Edit dates and other information as needed	
	• Click **SAVE** ○ Use **DELETE** to remove unwanted record	



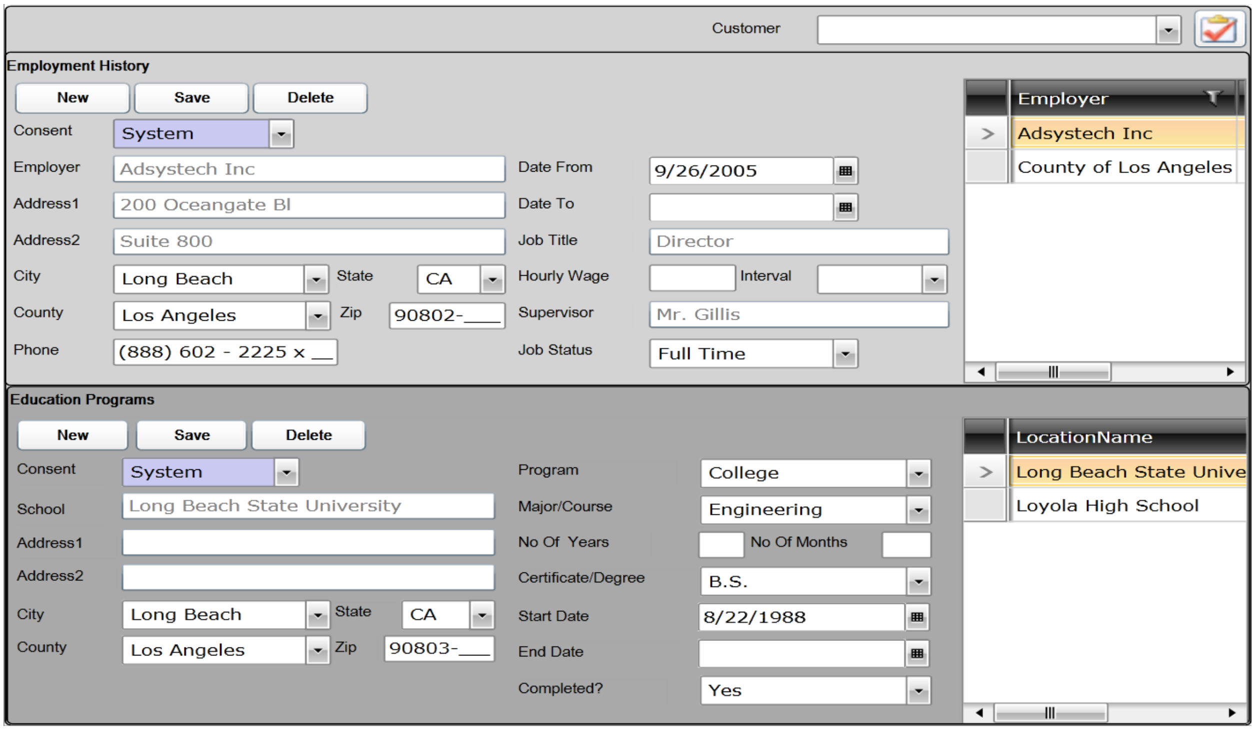
6	Click **HOUSEHOLD MANAGEMENT** to manage household	*Covered in Update Existing Customer section*

You have created a new Customer record and entered Customer contact information.

Enter Employment & Education

This process allows you to record employment and education information that will aid your organization in determining which services your Customer needs. This data should reflect the details associated with Customers' income sources recorded on the Household Page which determines the Customer's eligibility for programs and services.

Employment and education history is critical in identifying and addressing the barriers a Customer may face in obtaining gainful employment. This information also serves as the basis of promoting and tracking Customers' training, education, and employment placement and retention.



Enter Customer Employment and Education Information

#	Step	Notes
1	Click on **Employment – Education** Page	
2	Select Customer	*Make certain correct Customer is selected. Active Customer is displayed in tab at top of page with DOB.*
3	Add Employment record	
	Click **NEW** in Employment container	
	Select Consent Level	
	Enter or select Employment information	
	Click **SAVE**	*Use **DELETE** to remove records.* *Newly added employment record will be displayed on EMPLOYMENT GRID.*
	Repeat to add more Employment records	
4	Add Education record	
	Click **NEW** in Education container	

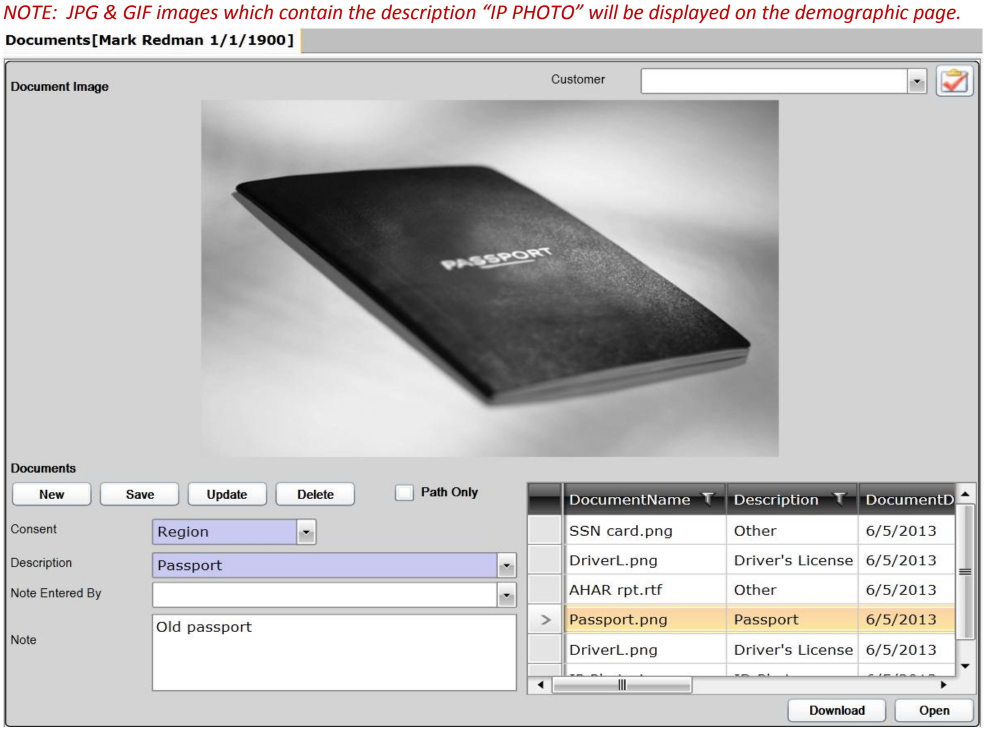
	Select Consent Level	
	Enter or select Education information	
	Click **SAVE**	*Click **DELETE** to remove records. The newly added education record will be displayed on EDUCATION GRID.*
5	Enroll Customer in Program	
	Click **READY FOR ENTRY** at top of page	*See Program Entry User Guide.*

You have entered Customer Employment & Education information.

Upload Documents

The Intake Documents Page allows you to store and view important documents associated with Customer, e.g., forms, applications, identification, and photos. If your Customers use Swipe Cards, you may store your photos used for Customer ID cards on this page. This process ensures documents are readily accessible to your organization. Uploading important documents also reduces the need to store paper copies.

NOTE: JPG & GIF images which contain the description "IP PHOTO" will be displayed on the demographic page.



Upload Customer Documents

#	Step	Notes
1	Click on **Documents** Page	
	Select Customer	*Make certain correct Customer is selected. Active Customer is displayed in tab at top of page with DOB.*
2	Upload/add a document	

	Click **NEW**	
	In the popup window navigate to and select the document you would like to upload	
	Click **OPEN**	*You may also double click on document. Document name will be displayed in DOCUMENTS GRID.*
	Select Consent Level	
	Enter or select Description	
	Select Note Entered By	*This should be your User ID.*
	Enter Note	*This is optional.*
	Click **SAVE**	
3	Enroll Customer in Program if appropriate	
	Click **READY FOR ENTRY** at top of page	*See Program Entry User Guide.*

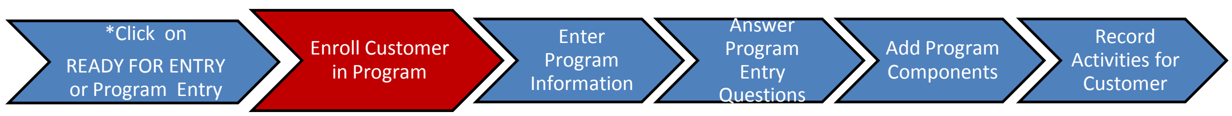
You have uploaded a document.

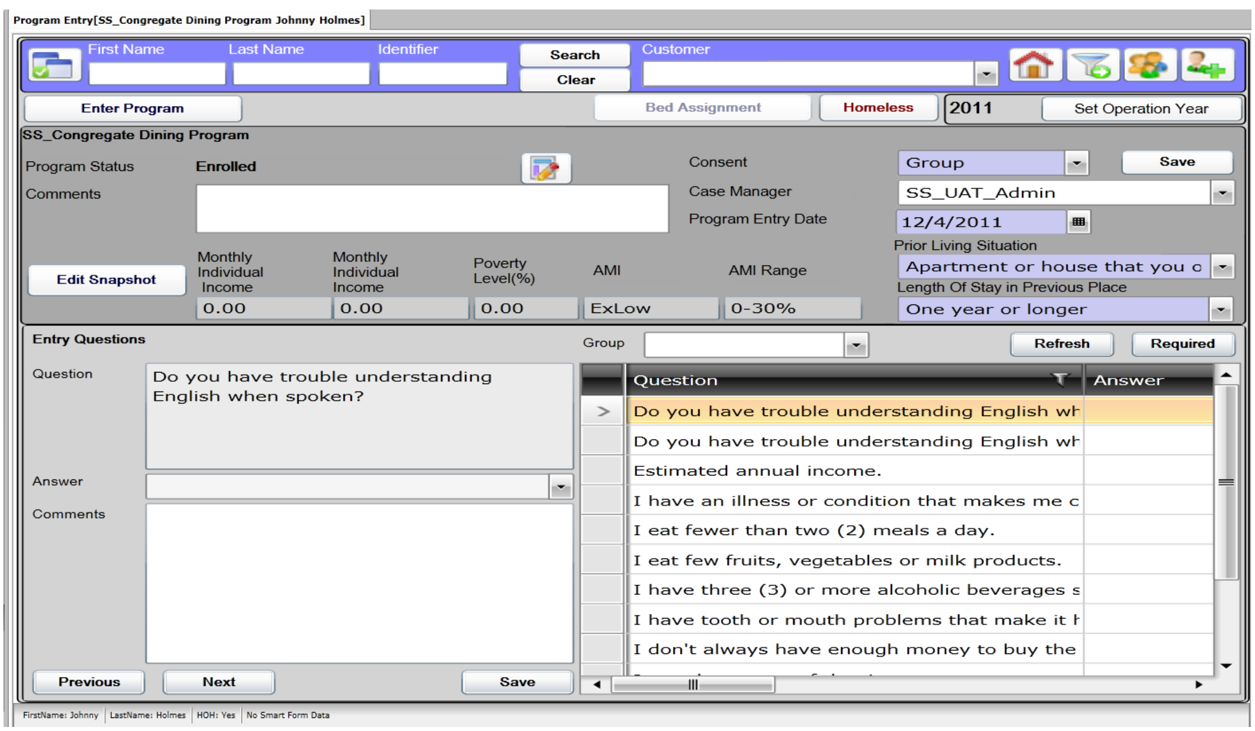
ENROLL CUSTOMER IN PROGRAM

Agency Services

Program Entry Page

The Program Entry process is used to enroll Customers in a particular program and assess the Customer’s current situation and eligibility for that program. Your program administrator may add questions specific to your organization and customize the Program Entry process. These additional questions will be displayed in the Entry Questions container. Make sure the Customer’s demographics, income and household information are up to date before beginning the entry process.

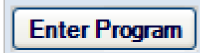


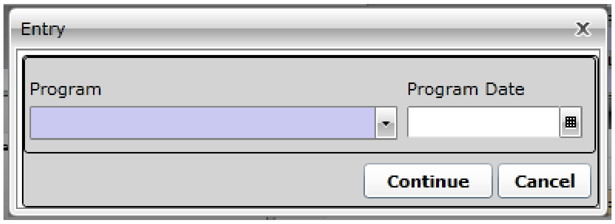


Enter Program Information

When a Customer is enrolled in a Program, his/her Income Snapshot is created. If this information is not current at the time you enroll the Customer in a Program, you must update the Income to reflect the Customer’s current situation.

#	Step	Notes
1	Click **Program Entry Page**	
	• Make sure correct Customer is active on page	*Active Customer is displayed in tab at top of page with DOB and in tab at bottom of page.*

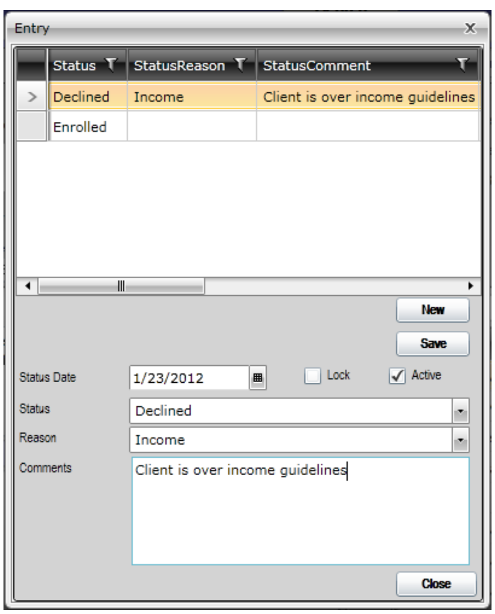
2	Enroll Customer in Program	
	• Click **ENTER PROGRAM**	 *Entry Popup window will be displayed.*



	Select the Program in the Program dropdown	
	• Select **Program Entry Date**	*Should reflect date Customer was enrolled in the Program.* *Date must be in mm/dd/yyyy format.*
	• Click **CONTINUE**	*If Program was set up to automatically enroll Family or Household members, 'Select Household Members' popup window will be displayed.*
	• If Select Household Members popup window is displayed	
	○ Uncheck household member(s) who should NOT be enrolled in Program	*Checkmark designates customer WILL be enrolled in program.*
	○ Click **SELECT** (only applicable if household members are automatically enrolled)	
	• Program Status will be displayed	
	• Enter Comments if needed	
	• Select Consent	*Based on organizational rules.*
	• Select Case Manager	*This will default to your User ID.*
	• Select Prior Living Situation	
	• Select Length of Stay in Previous Place	
	• Click **SAVE**	*If Household Auto Enroll Program, 'Select Household Members' popup window will be displayed.*
	• If Select Household Members popup window is displayed	
	○ Select Family/Household members who should have information saved to their record as above and click **SELECT**	
3	Confirm that Customer's Income information is accurate	*If Income information must be edited, see 'Edit Income Snapshot' under Optional Functionals.* *If Entry Questions exist, go to next section: Answer Program Entry Questions*
	• Click **HOMELESS** to view definition of homeless if needed	

Answer Program Entry Questions

#	Step	Notes
1	Select Group	*Where there are many questions, selecting the appropriate Group will display only the questions that correspond with your Program or Activity.* *Group may not always be populated.*
2	Read each Question in the Entry Question container	*Entry Questions are generated for the Program when the Customer's Program Entry is created.* *Click **REQUIRED** to display only required questions.*
3	Select or enter Answer in Entry Question container	*If multiple answers are permitted, check appropriate checkboxes.* *All answers will appear in QUESTIONS GRID.*
4	Enter Comments when needed	
5	Click **NEXT** or the ENTER key to advance to next question, click **PREVIOUS** to go back to previous question	*Some answers have jump logic built in to bring up next appropriate questions based on your responses.*
6	Click **REFRESH** to clear your answers and display all questions again	
7	Click **SAVE** in the Entry Questions container after you have answered all the questions	



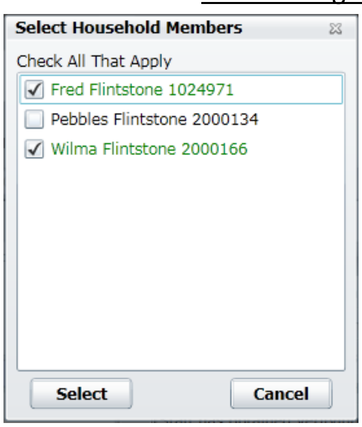
Update Program Entry status

Program Status automatically defaults to a predetermined value, which is often ENROLLED. The Customer's status may be changed as needed. Available values are managed by your agency administrator.

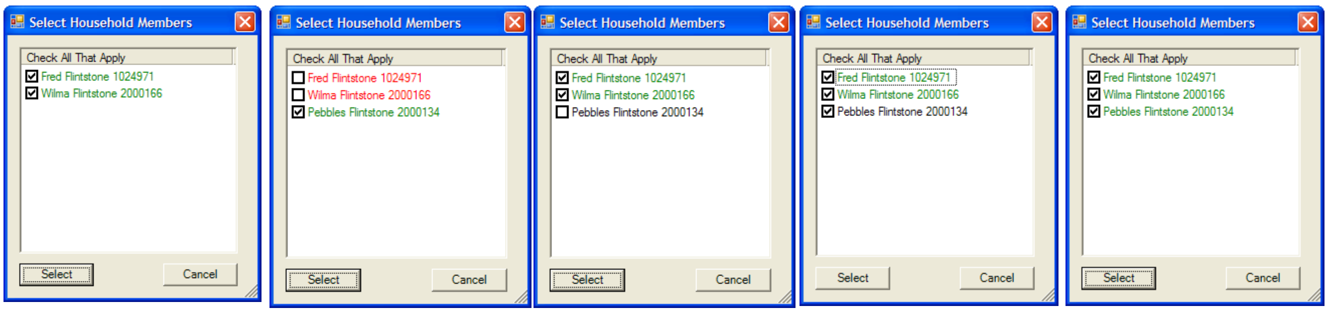
#	Step	Notes
1	Click **POPUP CLIENT STATUS HISTORY** 	*Status popup window will be displayed.*
2	Click **NEW**	
3	Fill out Status information	
	• Select Status date	*Status change occurred on this date.*
	• Select Status	
	• Select Reason if needed	
	• Enter Comments if needed	
	• Check **LOCK** checkbox if the status should not be changed	
4	Click **SAVE**	*Program Status will change on Program Entry page.*
5	Click **CLOSE** when finished	

Correct Who Entered Program as Group

If a Program is set up to allow multiple members of a Household or Family to be enrolled, those members will be part of a “group” that entered together. If members were not added together, you may make a correction and make them all part of the same group. All members will have the same Program Entry date and be in the same group when corrected.

#	Step	Notes
1	Click on **Program Entry page** for the Family member to whose group the other member should be added	
2	Click **SAVE** in the <u>Case Management</u> container 	*‘Select Household Members’ popup window will be displayed.* *Members of the Customer’s group will be displayed in green, members available to add to the group will be displayed in black, members not available to be added will be displayed in red.* *If the Member you wish to move is currently displayed in green, close the window and open the Entry page for a different member, usually the Head of Household. That member should now be displayed in green and the member you wish to move will be displayed in black.*
3	Select the member(s) to add by clicking their checkbox	
4	Click **SELECT**	*They will now be part of the same Group.*
	• If multiple members are displayed in red, you may need to change their group one at a time, depending on if they entered the program together or individually	
Example		
1	Fred and Wilma Flintstone were enrolled in a Program	
2	Pebbles Flintstone was enrolled in the Program at a different time than Fred and Wilma Flintstone	
	• On Pebble’s Entry Page, she is displayed in green,	*No changes may be made here.*

	while Fred and Wilma are displayed in red	
3	Return to Fred's Entry page, where Fred and Wilma are displayed in green and Pebbles is displayed in black	
4	Check Pebble Flintstone and click **SELECT**	*All Customers are members of the same group.*
5	Click **SAVE** again to view Select 'Household Members' popup	*All members are displayed in green.*



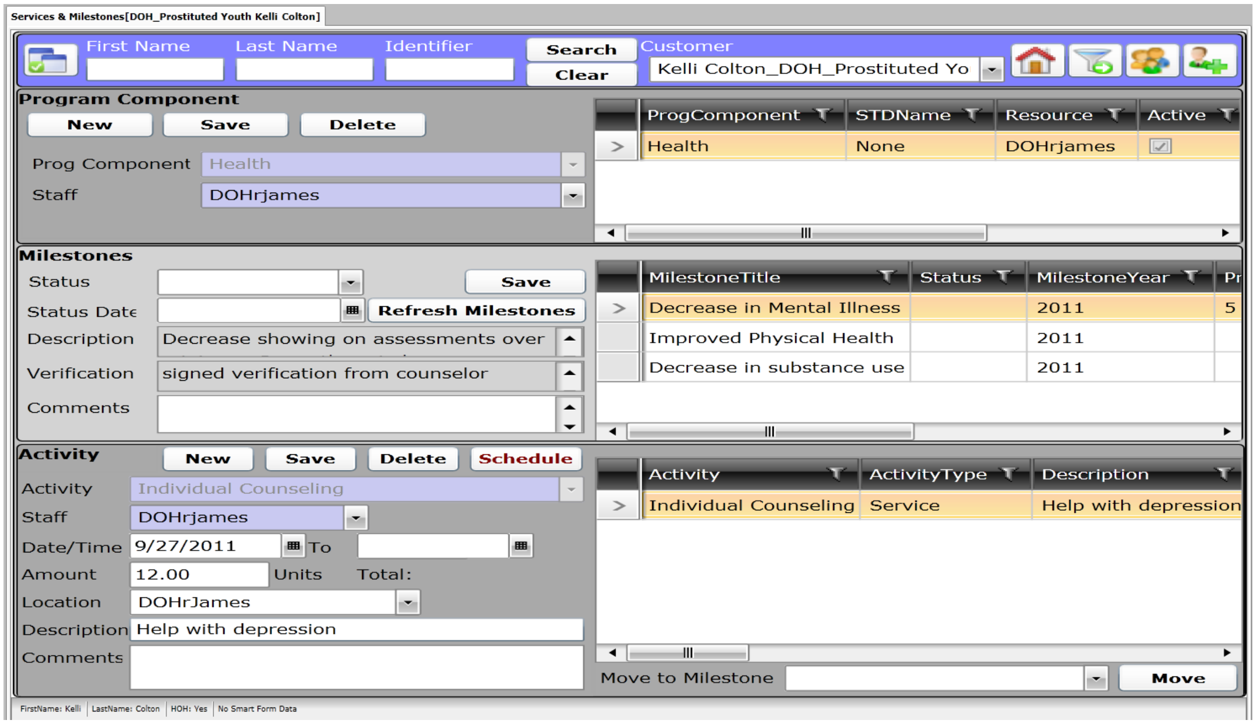
1 2 3 4 5

You have successfully enrolled a Customer in a Program.

Record Services & Milestones for Customer

The **Service Provided Page** displays the Customer's Program Components, Milestones, and Activities. Activities that are added for the Customer on other pages will be displayed here if they were linked to a Milestone, so this page serves as the Customer's "virtual case file".

This page allows you to select from pre-defined program objectives and track the associated execution. Information on this Page will be used to create Reports detailing types of Activities and the frequency in which they were performed to achieve the desired results. Also, Services (Activities) are linked to funding source details which is needed for reporting. The various reports generated from the Services & Milestones Page will allow your organization and Agencies to make programmatic, staffing and resource decisions to improve service delivery to Customers.



Add Program Component

A Program Component must be generated in order to record Activities and Milestones for a Customer. The Program Component must have Milestones created for the current year in order to be generated. A Customer may have multiple Program Components generated, but only one Program Component's Milestones and Activities may be displayed at a time.

#	Step	Notes
1	Click on **Service Provided Page**	
2	Select Customer	*Make certain correct Customer is selected. Active Customer is displayed in tab at top of page with DOB and bottom of page with name.*
3	Add Program Components	*Some Program Components may be generated automatically upon Program entry.*
	• Click **NEW**	
	• Select Program Component	*Dropdown will list all Program Components associated to the Program Customer is enrolled in.*
	• Select Staff Member	*Your User ID will automatically populate this field, but you may edit.*
	• Click **SAVE**	*Program Component will be displayed in PROGRAM COMPONENT GRID. Milestones are displayed in MILESTONES GRID.*
4	Repeat to add additional Program Components	
	• Click **DELETE** in <u>Program Component</u> container to remove unwanted Program Component	*Program Component may not be deleted if Activities have been associated with it.*

Record Activities for Customer

Some Activities may be generated automatically when the Program Component is created.

#	Step	Notes
1	Click on **Services Provided Page**	
2	Select Customer	*Make certain correct Customer is selected. Active Customer is displayed in tab at top of page with DOB and bottom of page with name.*
3	Add Activity	
	• Select correct Milestone in MILESTONES GRID	*Each Activity is linked to one Milestone. An Activity may be recorded on another page, but it will be displayed on the Services & Milestone Page when it is linked to a Milestone.*
	• Click **NEW** in <u>Activities</u> container	
	• Select Activity in dropdown	
	• Select Staff person	
	• If the Milestone Status should NOT change to Complete, uncheck **COMPLETE**	*If Complete checkbox appears next to Staff, the linked Milestone will automatically change Status to Complete.*
	• Enter Date and Time	*Some Activities may show End Date instead of Time.*
	• Enter Amount of Activity	*This is determined by your administrator.*
	• Select Location if needed	
	• Enter Description and Comments	
	• Click **SAVE**	*The Activity name will be grayed out and cannot be changed after **SAVE.*** *Activity will appear in ACTIVITIES GRID.* *Some Activities will calculate a Total Cost after **SAVE**.*
	• Use **DELETE** in <u>Activity</u> container to delete Activity records	*An Activity may only be deleted from the Page on which it was created.*
	• Repeat to record additional Activities	

Update Milestone Status

Milestone accomplishments may be recorded on the Services & Milestones Page. The Milestone Status will change to In Progress when an Activity is recorded and some statuses may change to Complete automatically. If new Milestones are added during a program year, they will not be displayed in the Program Components already generated for Customers until they are refreshed.

#	Step	Notes
1	Click on **Service Provided Page**	
2	Select Customer	*Make certain correct Customer is selected. Active Customer is displayed in tab at top of page with DOB and bottom of page with name.*
3	Select Program Component in PROGRAM COMPONENT GRID	

4	Select Milestone to be updated in the MILESTONES GRID	*Description and Verification will be displayed in Milestones container. If new Milestones are added during a Program Year, you must click **REFRESH MILESTONES** to display the new Milestones; otherwise they will not be displayed.*
5	Select Status	
6	Select Status Date	*This is the date the Milestone Status was changed.*
7	Enter Comments if needed	
8	Click **SAVE**	
9	Repeat to add additional Milestones accomplishments	

Associate Activity to different Milestone

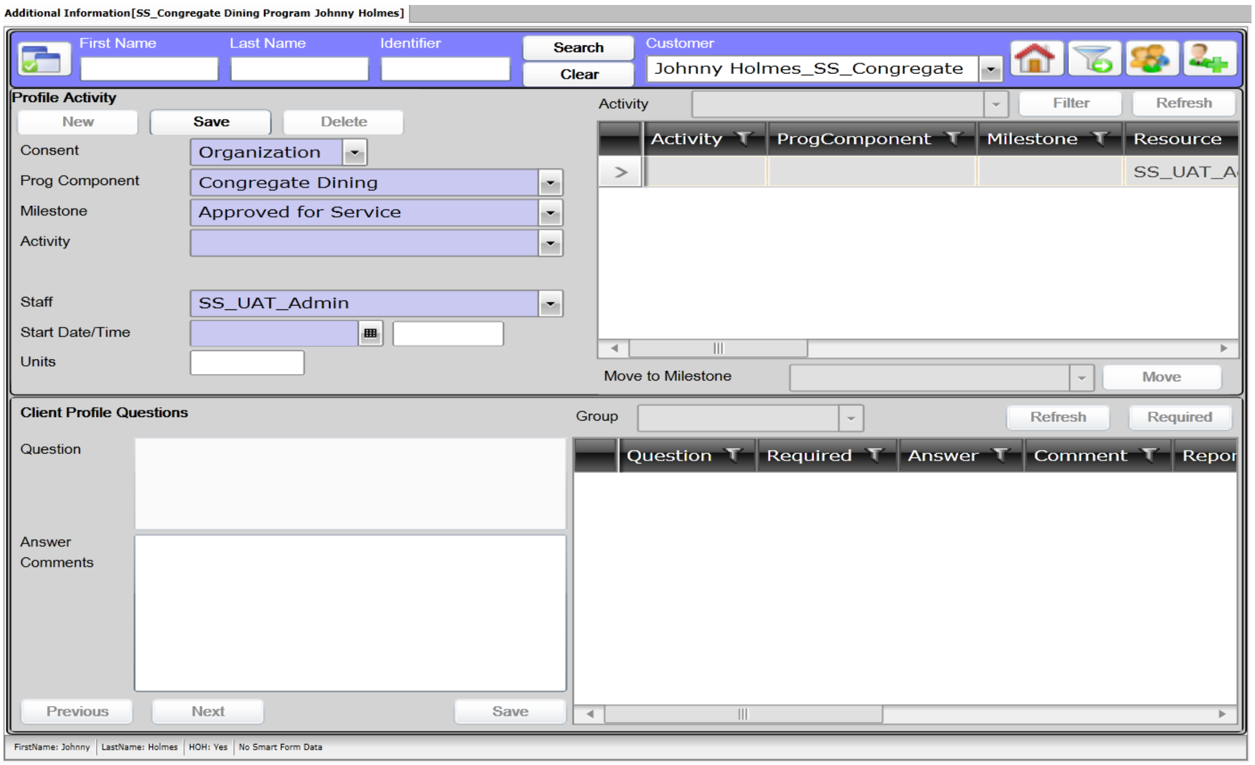
If an Activity was recorded and associated to an incorrect Milestone, you must associate the Activity to the correct Milestone.

#	Step	Notes
1	Click on **Service Provided** Page	
2	Select Customer	
3	Select Activity in ACTIVITIES GRID	*Activities are linked to Milestones; select a Milestone to see all the Activities associated to it.*
4	Select correct Milestone in Move to Milestone dropdown in Activity container	
5	Click **MOVE**	*To see moved Activity, click on correct Milestone in MILESTONES GRID and Activity will be displayed in ACTIVITIES GRID.*
6	Profile and Case Note activities may not be moved on the Services & Milestones Page, but you may associate them with the appropriate Milestone from the Eligibility and Case Notes Pages.	

You have recorded a Milestone and Activity for your Customer.

Record Additional Information (Client Profile)

The **Client Profile Page** lists additional questions to collect needed Customer information. Use this Page to capture information your organization needs specific to a Program and Program Component. Once the appropriate Program Component, Milestone and Service are selected, the questions will be displayed. Question sets are maintained by your program administrator.



Record Customer Profile Information

#	Step	Notes
1	Click Additional Information Page	*Make certain correct Customer is selected. Active Customer is displayed in tab at top of page with Program.* *Date Customer was enrolled is displayed on bottom tab.*
2	Create a new Profile	
	• Click **NEW** in Profile Activity container	
	• Select Consent Level	
	• Select Program Component	
	• Select Milestone	
	• Select Activity	*The selected Activity determines which Questions are displayed.*
	• Select Staff member	
	• Select State/Date Time	*Enter the date and time the Profile is created.*
	• Enter number of Units	*This may be days, hours or units.*
	• Click **SAVE** Use **DELETE** to remove unwanted Profile Activity	*The new Profile will appear in SERVICES GRID and the corresponding questions will appear in QUESTION LIST GRID.*
3	Answer Profile Questions	
	• Select Group	*Where there are many questions, selecting the appropriate Group will display only the questions that correspond with your*

		Program or Activity. *Group may not always be populated.*
	• Review each question in Question field in Customer Profile Questions container	*Click **REQUIRED** to display only required questions.*
	• Select or enter Answer in Answer field	*If multiple answers are permitted, check appropriate checkboxes.*
	• Enter Comments	*Optional*
	• Press Enter key or click **NEXT** to jump to next question	*Some answers have jump logic built in to bring up next appropriate questions based on your responses.*
	• Click **PREVIOUS** to return to the last question	
	• Repeat for additional questions	
4	Click **SAVE** in the Customer Profile Questions container after you have answered all the questions	
	• Create additional assessments for additional activities if needed	*All activities will appear in SERVICES GRID and Questions will appear in QUESTION LIST GRID.*

View Existing Profile/Assessment Questions and Answers

Filter allows viewing specific assessments.

#	Step	Notes
1	Select Activity in SERVICES GRID	*Questions and Answers will be displayed in QUESTION GRID.*
2	To filter Activity list	
	• Select Activity in Activity dropdown at top of page	
	• Click **FILTER** ○ Use **REFRESH** to view all Activities again	*Matching records will be displayed in SERVICES GRID.*
	• Select Activity in SERVICES GRID	*Questions and Answers will be displayed in QUESTION GRID.*

Move Activity to Different Milestone

If a Profile Activity was recorded and linked to the incorrect Milestone, you must associate that Activity with the correct Milestone.

#	Step	Notes
1	Select Activity in SERVICES GRID	
2	Select Milestone in Move to Milestone dropdown Profile Activity container.	*Make certain correct Customer is selected.*
3	Click **MOVE**	*Activity will appear on the Service Provider page linked to this Milestone.*

Update Profile Activity Status

Some Activities may use status updates to record status of customer services. Status values are managed by agency administrators.

#	Step	Notes
1	Select Profile Activity to update in SERVICES GRID	
2	Click **POPUP STATUS**	*Status popup window will be displayed.*
3	Fill out Status information	

	• Select Status date	*Status change occurred on this date.*
	• Select Status	
	• Select Reason if needed	
	• Enter Comments if needed	
	• Check LOCK checkbox if the status should not be changed	
4	Click **SAVE**	*Program Status will change on Program Entry page.*
5	Click **CLOSE** when finished	

You have captured Additional Client Profile Information.

UPDATE EXISTING CUSTOMER

Search for Customer – Central Intake

You must first search for the Customer record before updating any Customer information. Searching and selecting the correct Customer will ensure your updates are accurate and prevent duplicate records from being created.

Search for a Customer

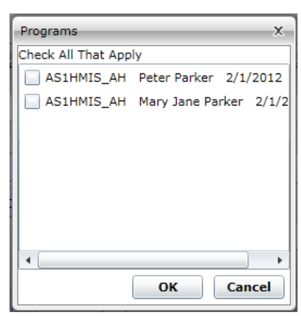
#	Step	Notes
1a	Search from **New Client Intake Page**	
	• Click on Client Intake Page	
	• Enter Customer's First Name and Last Name in the Search fields at top of page	*You do not need to enter the complete name.*
	• Click **SEARCH**	*The system will automatically check for the Customer entered.* *A popup window will display all the possible matches.*
	• Select Customer and click **SELECT**	*Customer Name and DOB will appear on top tab.*
1b	Search from **Client Listing Page**	
	• Click on Client Listing Page	
	• Enter Customer's First Name and Last Name in the top container of the page	*You may also enter Customer's Identifier, SSN last 4, or DOB.*
	• Click **SEARCH**	*Potential Customer matches will be displayed in grid below.*
	• Select Customer in grid	

You have searched and selected an existing Customer.

Update Contact Information

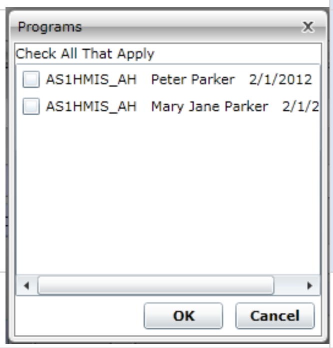
Customer contact information often changes and must be updated. Current contact information is necessary to ensure your organization may contact your Customers when needed. When a change is made to Central Intake data, the User is given the choice of updating the information in the last snapshot created for the customer; Users will see only those Programs to which they have permission.

NOTE: When updating Central intake household records the user will be given the option to synchronize their updates with the last snapshot of any Customer applications (program entries) to which they have access. To the right is a sample of the popup users will see. Simply by selecting the Customer application(s) you wish to update, the last snapshot will be updated with the changes at save.



Please refer to the Sync Snapshot instructions for additional information.

Update Customer Contact Information

#	Step	Notes
1	Update Customer Contact Information	
	• Click on **New Client Intake Page**	*Make certain correct Customer is selected from Search.* *Active Customer is displayed in tab at top of page with DOB.*
	• If Customer record is grayed out, click **ADD**	*Customers created at other Organizations will be unavailable until you add permission to use the record.*
	• Update all appropriate fields	*Click **Clear** to clear Last Know Permanent Address information.* *Click **Select Address** to select an existing address.* *Updating Address changes the address for the entire household.*
	• Click **SAVE** 	*If Customer is enrolled in a Program, a popup window will be displayed listing all Program records. Each record will display the Program Name, Household member and Program Entry date.* *Check Programs to have their last Snapshot record updated. Unchecked programs will not be updated.*
	• Check Programs to update • Click **OK**	
2	Update Customer SSN	
	• Click arrow to the right of SSN field	*A popup window will allow you to enter a new SSN and SSN Code.*
	• Click **SAVE**	*Customer Intake Page will display the last 4 digits of the new SSN.*

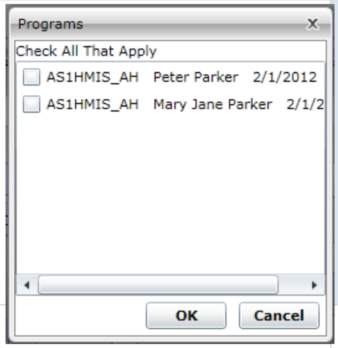
You have updated Customer Contact Information.

Update Demographics, Household, and Income Information

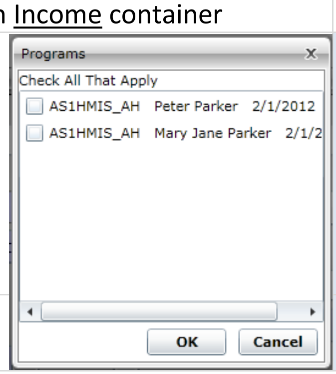
Maintaining Customer information is crucial to effectively and appropriately deliver services to your customers. Changes in Customers' circumstances must be reflected in the system to ensure their eligibility for Programs. When a change is made to Central Intake data, the User may be given the choice of updating the information in the last snapshot created for the customer; Users will see only those Programs to which they have permission.

Update Household and Demographic Information

#	Step	Notes
1	Click on New Client Intake Page	*Make certain correct Customer is selected from Search.* *Active Customer is displayed in tab at top of page with DOB.*

2	Edit Customer Demographics	
	• Select Customer in HOUSEHOLD MEMBERS Grid	*Select member whose information will be updated.*
	• Update Customer SSN ○ Click arrow to the right of SSN field ○ Click **SAVE**	*A popup window will allow you to enter a new SSN and SSN Code.* *Customer Intake Page will display the last 4 digits of the new SSN.*
	• Update all appropriate fields in Demographics Tab	
	• Click **SAVE** 	*If Customer is enrolled in a Program, a popup window will be displayed listing all Program records. Each record will display the Program Name, Household member and Program Entry date.* *Check Programs to have their last Snapshot record updated. Unchecked programs will not be updated.*
	• Check Programs to update • Click OK	
3	Add New Members to Household	*See Add Household Members above under Add Demographics, Household & Income process.* *Sync popup window will be displayed after saving new member.*

Update Customer and Household Income Information

#	Step	Notes
1	Click on **New Client Intake** Page	*Make certain correct Customer is selected from Search.* *Active Customer is displayed in tab at top of page with DOB.*
2	Select Customer in HOUSEHOLD MEMBERS GRID	*Select member whose income will be updated.*
3	Update Income	
	• Click Income Tab	
	• If more than one Income Source, select income source in INCOME GRID	
	• Update income displayed in <u>Income</u> container	
	• Click **UPDATE** ○ Use **DELETE** to remove an unwanted income source 	*If Customer is enrolled in a Program, a popup window will be displayed listing all Program records. Each record will display the Program Name, Household member and Program Entry date.* *Check Programs to have their last Snapshot record updated. Unchecked programs will not be updated.*
	• Check Programs to update • Click **OK**	*Updated income will be displayed above grid.*

4	Update Non-Cash Benefits	
	• Update non-cash benefits at bottom of tab	
	• Click **SAVE NON CASH BENEFITS**	*Sync popup window will be displayed.*
5	Add additional Income Source	
	• Click **ADD**	
	• Select Income Source	
	• Enter Stated Income	*Each income source must be associated to the household who receives that income.*
	• Select Pay Interval	
	• Select Documentation	
	• Click **UPDATE**	*Additional Income Sources should be displayed in INCOME GRID.* *Sync popup window will be displayed.*

Update Family and Household Members

After making changes to the Household members, you must check their Relation to make sure it is still accurate. If you make change and click SAVE, the sync snapshot popup window may be displayed.

#	Step	Notes
	Click **HOUSEHOLD MANAGEMENT** Tab	
1	Change Head of Household	
	• Select Customer in HOUSEHOLD MEMBERS GRID to be new HoH	
	• Click **SET HEAD OF HOUSEHOLD**	*Customer will now be designated HOH and former HOH will automatically be changed.* *A message will appear advising you to update the Relation to HOH for all household members.*
	• Select each Household Member in HOUSEHOLD MEMBERS GRID and update his/her Relation Status on the Demographics Tab	*Notice the Demographics tab label turns red if required information is missing.*
2	Move Customer(s) to NEW Household	*You may only move Head of Household to a new Household when there are no other members of household.*
	• Select Customer(s) in HOUSEHOLD MEMBERS Grid on left	
	• Click **NEW HOUSEHOLD** at right	
	• Click **>>**	*Selected Customer will be Head of Household of new Household. If moving more than one individual, all the members will be displayed and the selected Customer will become the designated HOH.* *New Family ID will be assigned to new Household.* *New address must be created for new Household (see Edit Address above).*

3	Move Customer(s) to EXISTING Household	
	• Select in Customer(s) in HOUSEHOLD MEMBERS GRID on left to be moved to other existing Household	*You may only move Head of Household to another existing Household when there are no other members of household.*
	• Enter First and/or Last of HH and click **SEARCH**	*Select popup window will display matches.*
	• Select existing HOH in Household and click **SELECT**	
	• Click **>>**	*Customer will move to a different, existing Household.* *A new Family ID will be assigned.* *If Customer will join the Family in this Household, see Move Customer(s) to an EXISTING Family in the same Household below.*
4	Move Customer(s) to NEW Family within same Household	
	• Select Customer(s) in HOUSEHOLD MEMBERS GRID to be moved to new Family	
	• Click **CHANGE FAMILY**	*A new family will be created within the same household and a new Family ID will be assigned to the Customers.*
5	Move Customer(s) to an EXISTING Family within the same Household	
	• Select Customer(s) in HOUSEHOLD MEMBERS GRID to be moved to new Family	
	• Select the new Family ID in dropdown next to **CHANGE FAMILY**	
	• Click **CHANGE FAMILY**	*Customer will be moved to the selected family and remaining household will be unchanged.*
6	Update Customer Status to Deceased	
	• Select Customer in Household Members Grid	
	• Click **DECEASED**	*Popup window will be displayed.*
	• Select Deceased Date	
	• Click **SET CLIENT AS DECEASED**	
	• Click **CLOSE**	*Household member will no longer be displayed, but will not be removed from database.*

You have updated Customer Demographics, Household, & Income information.

Manage Documents

Customers' documents change and must be replaced or become outdated. This process allows you to update and delete existing documents.

Update, Download, and Delete Documents

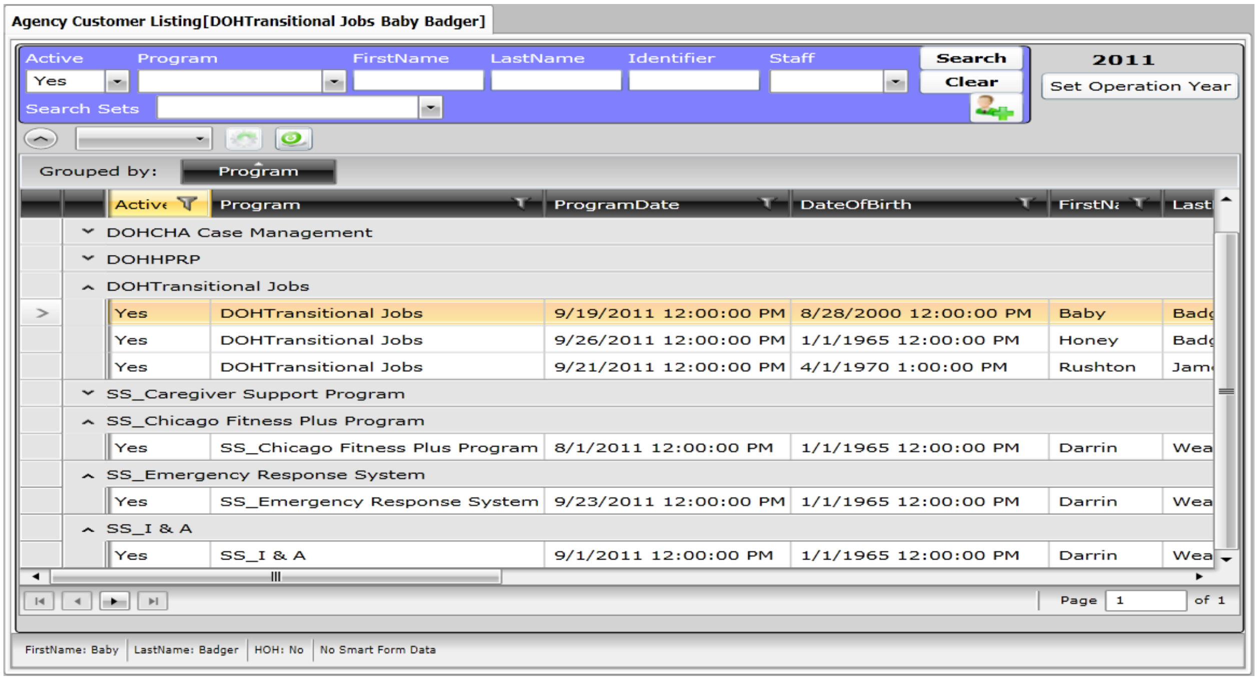
#	Step	Notes
1	Click on Intake Documents Page	

2	Select Customer	*Make certain correct Customer is selected. Active Customer is displayed in tab at top of page with DOB.*
3	Update a Document	
	• Select file to update in the DOCUMENTS GRID	
	• Click **UPDATE**	
	• In popup window navigate to and select the document you would like to replace the selected document	
	• Click **OPEN**	*You may also double click on the document in the popup window.*
	• Click **SAVE**	*Updated document will be displayed in DOCUMENTS GRID.*
4	Delete a document	
	• Select Customer in dropdown	
	• Select file to be deleted in DOCUMENTS GRID	
	• Click **DELETE**	*Record will no longer be displayed in DOCUMENTS GRID.*
5	Download a document	
	• Select Customer in drop down	
	• Select file to update in the DOCUMENTS GRID	
	• Click **DOWNLOAD**	
	• Click **SAVE**	*'Save As' popup window will open.*
	• Select location and name for document	
6	Open a document	
	• Select Customer in dropdown	
	• Select record in DOCUMENTS GRID	
	• Click **OPEN**	*File will open in the appropriate application.*
7	Enroll Customer in Program if appropriate	
	• Click **JUMP TO ENTRY** at top of page	*See Program Entry User Guide for more details.*

You have updated Documents.

Search for Customer – Agency Services

Only Customers for which you have rights to view will be displayed on the Customer Search Page. If a Customer is set to Private, the Customer will not be visible unless you have rights to view private records. Customers may be sorted by various existing criteria.



Search for a Customer or Customers

Once a specific list of Customers is displayed on the Agency Client Listing Page, the list will be available in the Customer dropdown for all Programs & Services pages.

#	Steps	Notes
1	Click on Agency Client Listing Page	
2	To display all Programs in which Customer has been enrolled, enter Customer Last and First Name and click **SEARCH**	*All records, inactive and active programs will be displayed.* *One record will display "no" which represents the Central Intake record.*
3	To display only active Programs in which Customer is enrolled, enter Customer Last and First Name and select **YES** for Active and click **SEARCH**	
4	To display all Customers enrolled in a specific Program, select that Program and click **SEARCH**	*To display only Customers currently enrolled in the selected Program, select **YES** for Active.*
5	To display only active Programs, select **YES** for Active	

Search for your Caseload

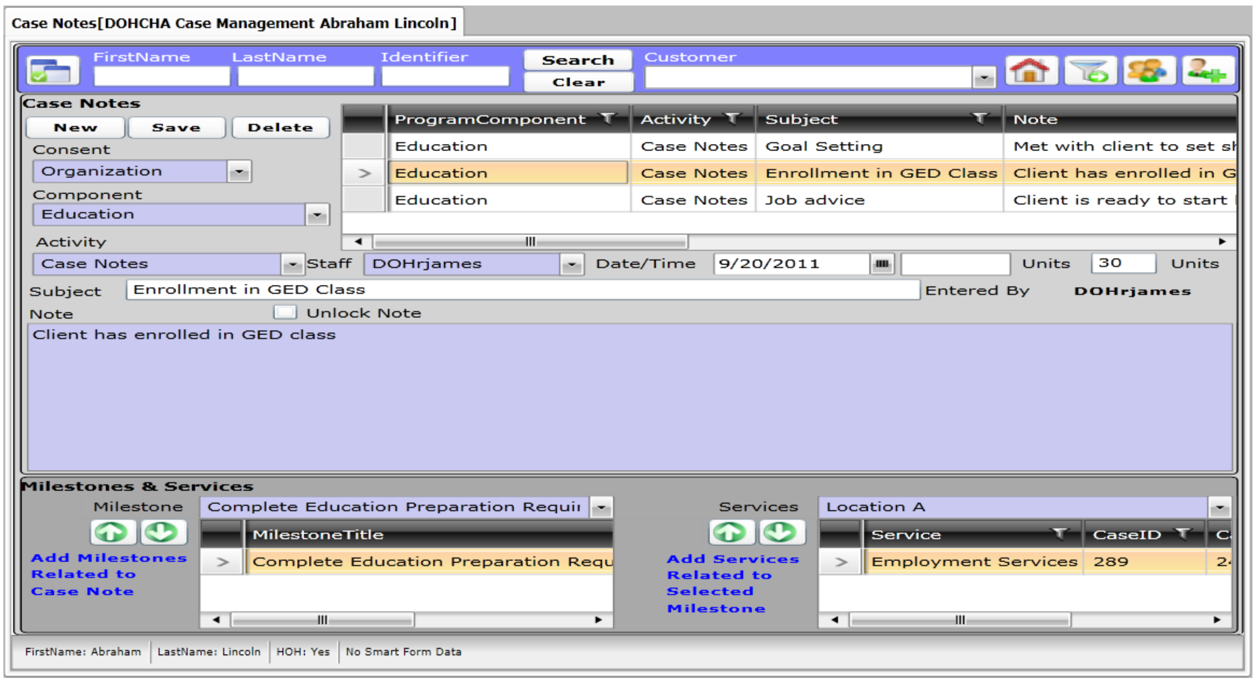
#	Step	Notes
1	Click on Agency Client Listing Page	
2	To display all your active Customers, select **YES** for Active, select your User ID for Staff and click **SEARCH**	

3	To display all your active Customers for a specific Program, select **YES** for Active, select your User Id for Staff, select Program and click **SEARCH**	

You have searched for and selected an existing Customer.

Create Case Notes (Case Activities)

Case Notes track Customer meetings, needs, and trends associated to a specific Program. Case Notes may be private or public to other members of your organization depending on the Consent Level. Case Notes may be linked to more than one Milestone and additional Services may be recorded on this page. Case notes allow case managers to document details and observations during encounters with the Customers.



Enter Case Notes

#	Step	Notes
1	Click on **Case Notes** Page	*Make certain correct Customer is selected. Active Customer is displayed in tab at top of page with DOB.*
2	Click **NEW**	
3	Enter details	
	• Select Consent Level	*Different Consent Levels can be used for each Case Note.* *Users will be able to view only those Case Notes for which they have correct permission.*
	• Select Program Component and Activity	

	• Select Staff member	
	• Select Date and Estimated Time	
	• Enter Amount	
	• Enter Subject of Note	
	• Entered by will default to your User ID	
	• Enter Note	
	• Check **UNLOCK NOTE** if note may be editable by other users	*Where UNLOCK NOTE is not checked, Note will not be editable by other users. Only the user who created the Note may unlock the Note.*
4	Click **SAVE**	*A message will appear with a reminder to attach one or more Milestones to the Case Note.* *While you are not required to attach the Case Note to a Milestone, it will not appear on the Services Page unless the two are linked.*
5	Click **OK** in popup message window	
6	Link Case Note to Milestone	
	• Select Milestone in Milestone dropdown	
	• Click **ADD MILESTONE** ○ Click **REMOVE MILESTONE** to remove unwanted Milestone link	*Milestone will be displayed in MILESTONE TITLE grid.*

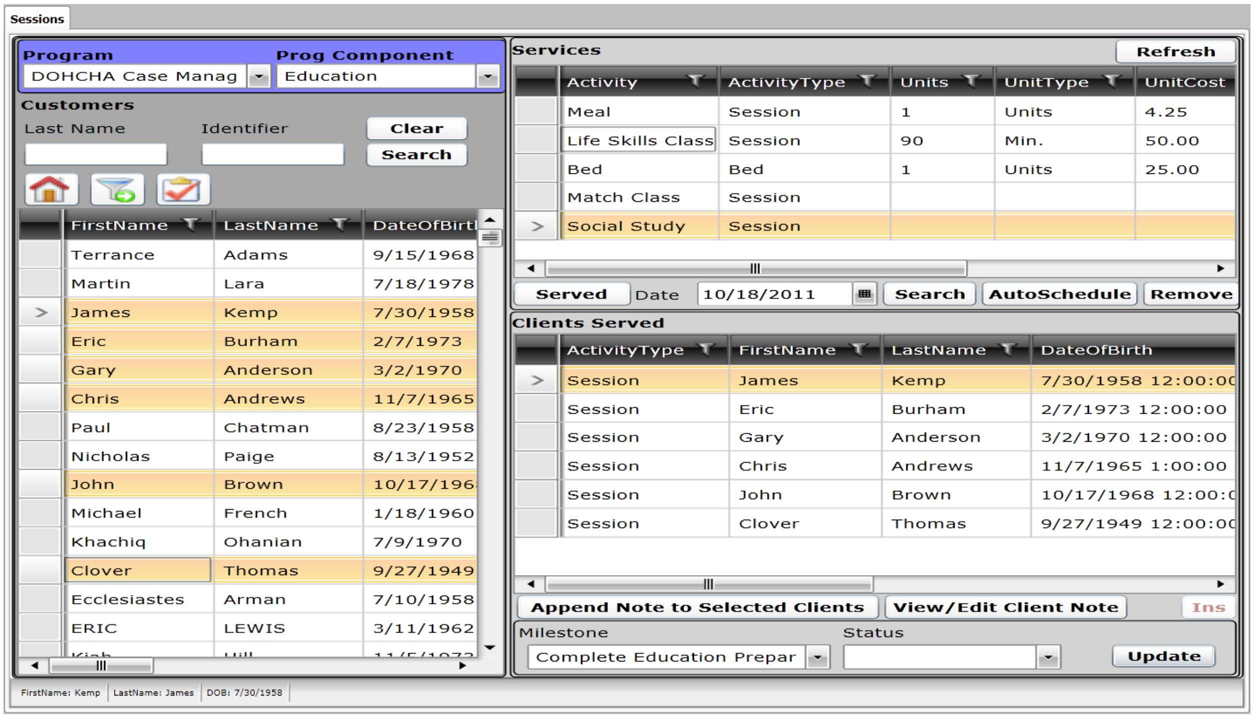
Record Additional Services

#	Step	Notes
1	Record Service	
	• Select Milestone in Milestone dropdown	*Services will be linked to selected Milestone.*
	• Select Service in Services dropdown	
	• Click **ADD SERVICE** ○ Click **REMOVE SERVICE** to remove an unwanted Service	

You have created a Case Note.

Create Group Activities (Group Sessions)

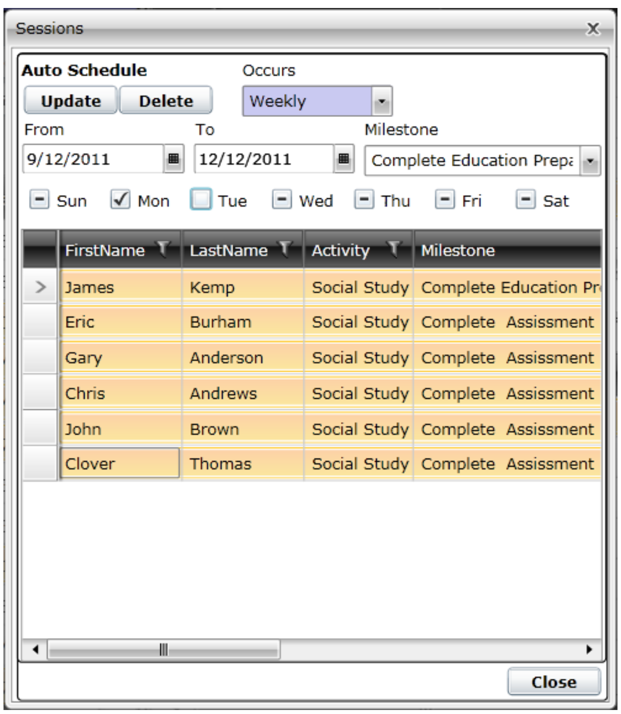
Record multiple Activities for multiple Customers on this page. Customers may also be scheduled for a recurring activity. After recording an activity for Customers, you may link the entire group to a Milestone, update the status of the Milestone, assign an Instructor, and attach a note to all of their records.



Create Session Activity

#	Step	Notes
1	Click **Sessions** Page	
2	Select Program	
3	Select Program Component	
4	Click **SEARCH** in <u>Customers</u> container	*All active Customers will be displayed in CUSTOMER LISTING GRID in <u>Customers</u> container and all active session activities will be displayed in SERVICES GRID at top right.* *You may also search for a specific Customer by entering Last Name or Identifier and clicking **SEARCH**.*
5	Create Session Activity	
	• Select Customer(s) in CUSTOMER LISTING GRID	*To select multiple records, use CTRL key and click to select nonconsecutive records or use SHIFT and click to select a range of records.*
	• Select Activity(ies) in SERVICES GRID	
	• Select Date	*This is the date of the Activity.*
	• Click **SERVED**	*Customers who participated in the Activity will be displayed in CLIENTS SERVED GRID.*
6	Link Customer Activities to Milestone	*You are not required to link Activities to a Milestone, but the Activity will not be displayed on the Services & Milestones Pages unless it is linked to a Milestone.*

	• Select records in CLIENTS SERVED GRID	
	• Select Milestone	
	• Select Status	*If Status is left blank, Milestone Status for all selected Customers will not be changed.*
	• Click **UPDATE**	
7	Link Customer Activities to Instructor	*This is optional.* *Instructor must be setup for this Activity for this function to be active.*
	• Select records in CLIENT SERVED GRID	
	• Click **INS**	
	• In popup window, select Instructor and click **SAVE**	
8	Attach Note to Customer Activity record	*This is optional.*
	• Select records in CLIENTS SERVED GRID	*The same note may be attached to multiple Customer records.*
	• Click **APPEND NOTE TO SELECTED CLIENTS**	*Use VIEW/EDIT CLIENT NOTE to view or edit an existing note.*
	• Enter text for note in popup window	
	• Select Date	
	• Click **SAVE**	*Note text will be displayed in Comments field on Services page if Activity is linked to Milestone and on Case Notes page.*



Schedule Recurring Session Activities

Schedule an activity to reoccur on a daily, weekly, or monthly basis. Multiple Customers may be scheduled for one or multiple Activities.

#	Step	Notes
1	Click **Sessions** Page	
2	Select Program	
3	Select Program Component	
4	Click **SEARCH** in Customers container	*All active Customers will be displayed in SERVICES GRID at bottom left and all active session activities will be displayed in Grid at top right.* *You may also search for a specific Customer by entering Last Name and clicking **SEARCH**.*
5	Select Customer(s) in CUSTOMERS LISTING GRID	*To select multiple records, use CTRL key and click to select nonconsecutive records or use SHIFT and click to select a range of records.*
6	Select Activity(ies) in SERVICES Grid	
7	Click **AUTOSCHEDULE**	
8	In popup window, schedule Activity	
	• Select Customer(s) in Grid	
	• Select Frequency	
	• Select Start and End dates	*Past dates will create the Activity immediately; future dates will create Activity when nightly batch job runs.*
	• Select Milestone	*This field defaults to first Milestone.*
	• Click **UPDATE**	*Use **DELETE** to remove unneeded schedules.*
	• Click **CLOSE**	

Remove a Session Activity

Session activities that have been created may be removed from this page when necessary; these activities may not be deleted on the Services and Milestones page.

#	Step	Notes
1	Click **Sessions** Page	
2	Select Program	
3	Select Program Component	
4	Click **SEARCH** in Customers container	*All active Customers will be displayed in CUSTOMER LISTING GRID and all active session activities will be displayed in SERVICES GRID at top right.* *You can also search for one Customer by entering last name and click **SEARCH**.*
5	Select Customer(s) in CUSTOMER GRID	*To select multiple Customer records, use CTRL key and click to select nonconsecutive records or use SHIFT and click to select a range of records.*
6	Select Activity in SERVICES GRID	

7	Select Date	
8	Click **SEARCH** in Services Container	*Matching Customer records will be displayed in CLIENTS SERVED GRID.*
9	Select Customer records in CLIENTS SERVED GRID to be deleted	
10	Click **REMOVE**	*Selected Customer records will be deleted from CLIENTS SERVED GRID.*

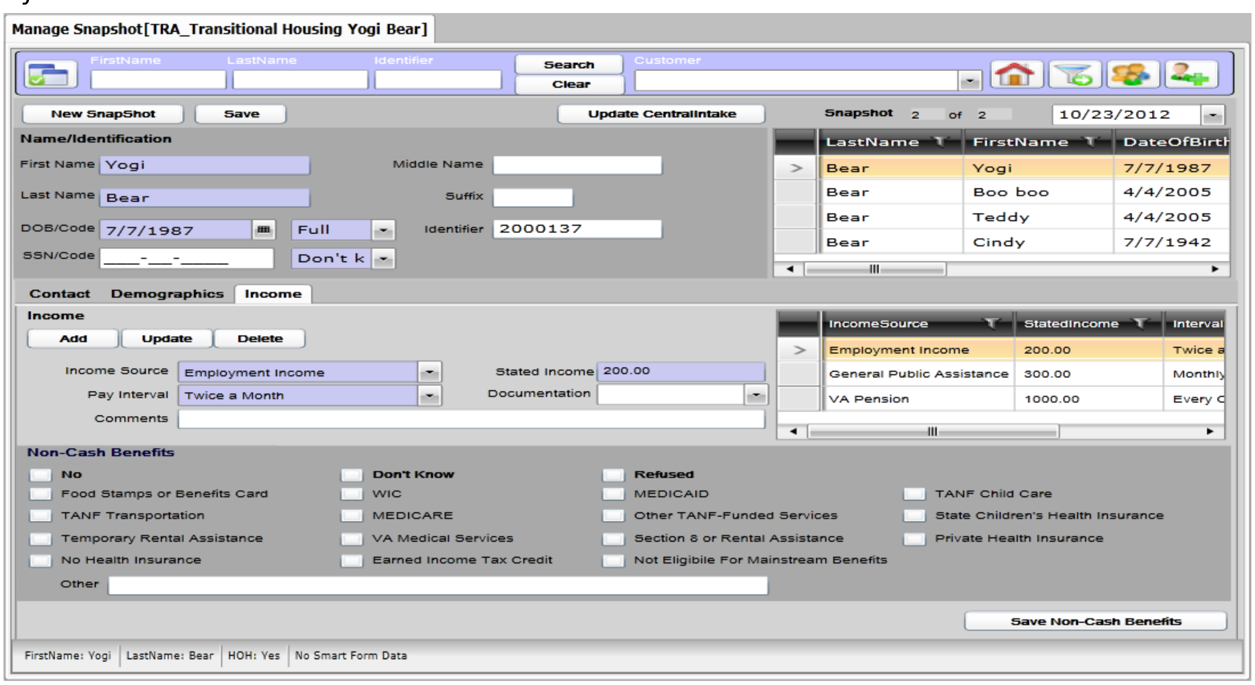
You have successfully created a Session activity for one or more Customers.

Add or Update Income Information in Snapshot

Federal and State reports may require your organization to record Customer or Household changes in income. Where the Customer income changes, you must update Income information. There are various ways to update Customer Income data.

If the Customer information was incorrect at the time of Program Entry, the easiest way to edit it is on the Snapshot itself, located on the Manage Snapshot page.

The change can also be made in Central Intake; when the change is saved, a popup window will display all Program snapshot records for the Customer that the User has permission to view. Checking a Program will update the last Snapshot for that Program. *See the Central Intake guide for more information.*



Make Corrections to the Program Entry Income Snapshot

The Program Entry Snapshot should be corrected only when information collected at the time of entry was incorrect. Snapshot 1 of 1 should always reflect the Customer's situation at the time of entry.

Note that when the Customer enrolls in another Program, his/her Income Snapshot will be based on the current Central Intake income information and not the Income Snapshot from the previous Program Entry. Any changes made to a Customer's income Snapshot will also be reflected in the snapshots of other family members, depending on program setup.

#	Step	Notes
1	Open **Snapshot Management** page	
2	Make certain FIRST Snapshot is displayed	*Number at top right should indicate the first snapshot, e.g., 1 of 1, 1 of 2.*
	• Select Date if needed	
3	Correct Customer Income	*Income should be changed only if it was incorrect at the time of program entry.*
	• Select Customer in HOUSEHOLD GRID	
	• Click INCOME tab	
	• Select Income record in INCOME GRID	*Click **ADD** if additional income record needs to be added.*
	• Update Customer Income	
	• Click **UPDATE**	*Use **DELETE** to remove an unwanted income record*
	• Make corrections to Non-Cash Benefits if needed	
	• Click **SAVE NON-CASH BENEFITS** at bottom of page	
	• Repeat for other family/household members if needed	
4	Correct Demographics information	*Demographics should be changed only if they were incorrect at the time of program entry.*
	• Select Customer in HOUSEHOLD GRID	
	• Click DEMOGRPAHICS tab	
	• Make changes to demographic information	
	• Click **SAVE**	
	• If changes are needed for other Family members, select the customer in HOUSEHOLD MEMBER GRID	
	• Click **CLOSE** when finished	*Information will be saved to all family/household members' Income Snapshots depending on program setup.*
5	Correct Contact information	*Contact information should be changed only if it was incorrect at the time of program entry.*
	• Select Customer in HOUSEHOLD GRID	
	• Click CONTACT tab	
	• Make changes to demographic information	
	• Click **SAVE**	
6	If data should be updated in Central Intake, click **UPDATE CENTRAL INTAKE**	

Add Income Snapshot

Some Programs may have requirements to collect Income information for Customers at regular intervals. New snapshots can be created at any time to show changes in a Customer's income. A new snapshot can be created and the user should update that snapshot to reflect their current situation. The snapshot will reflect what is currently in Central Intake, so changes can be made in Central Intake first before creating the snapshot. A new snapshot will be created for all household members, depending on program setup.

#	Step	Notes
1	Open **Manage Snapshot** page	*Entry Program popup window will be displayed.*
2	To add a new Snapshot:	
	• Click **NEW SNAPSHOT**	*A new snapshot will be created and will be numbered sequentially and have today's Date. It will reflect the current income from Central Intake.*
3	If changes need to be made to the Customer's income:	
	• Select Customer in HOUSEHOLD GRID	
	• Click INCOME tab	
	• Select Income record in INCOME GRID	*Click **ADD** if additional income record needs to be added.*
	• Update Customer Income	
	• Click **UPDATE**	*Use **DELETE** to remove an unwanted income record.*
	• Make corrections to Non-Cash Benefits if needed	
	• Click **SAVE NON-CASH BENEFITS** at bottom of page	
	• Repeat for other family/household members if needed	
4	If data should be updated in Central Intake, click **UPDATE CENTRAL INTAKE**	

Reset Income Snapshot

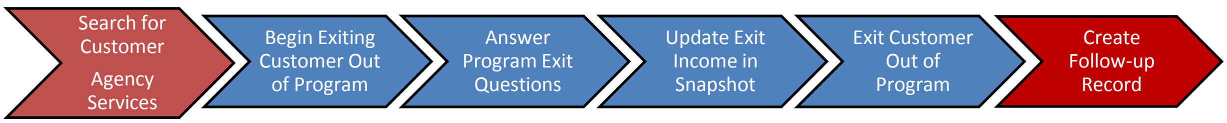
If the Customer information was incorrect at the time of Program Entry, the Snapshot can be reset to match current Central Intake data. The **RESET** button will remove all existing Snapshots and replace them with the current Income Snapshot.

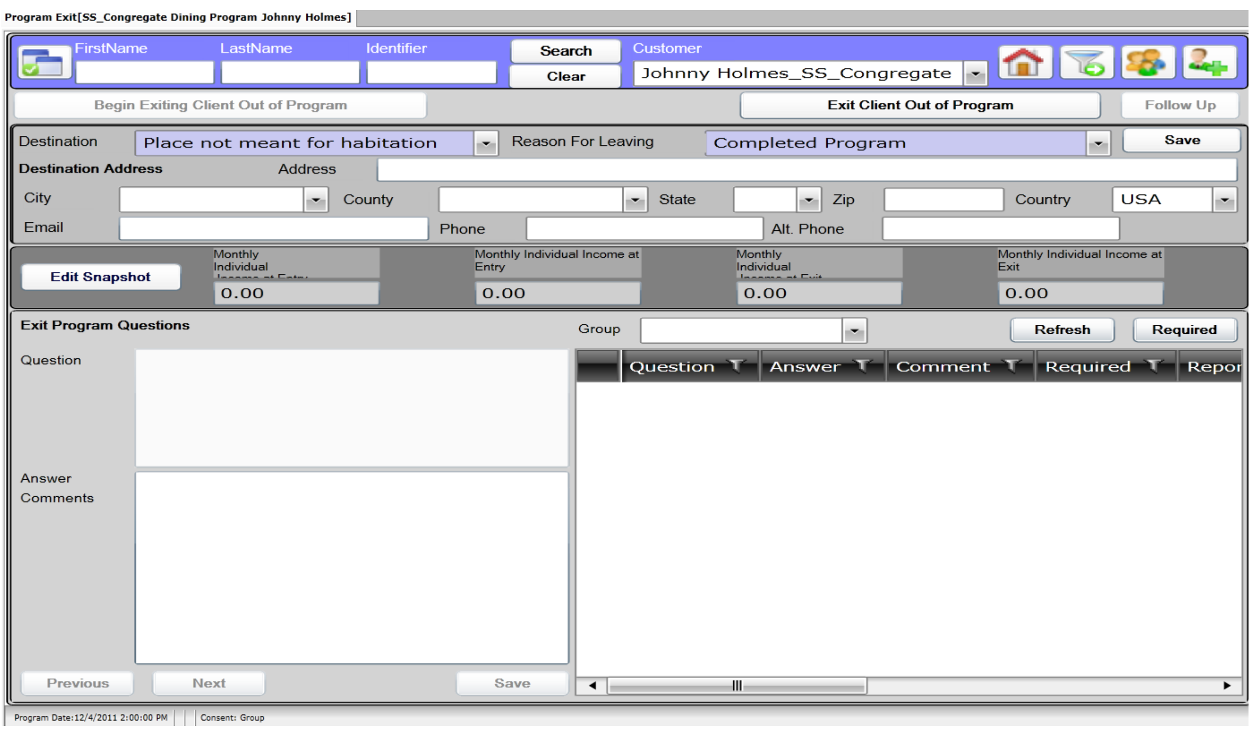
#	Step	Notes
1	Click **EDIT SNAPSHOT** on Entry page	
2	Click **RESET**	*The Income Snapshot will now reflect the current Income information in Central Intake.*
3	Click **CLOSE**	

EXIT CUSTOMER FROM PROGRAM

Program Exit Page

The Program Exit Page is used to remove an enrolled Customer from a Program. There may be questions specific to the Program that should be answered before exiting the Customer from the Program. Once a Customer is exited from a Program, the Program records are locked and may not be changed. However, you may view and create reports on this information.   If the Customer's income is not accurate, it should be changed prior to beginning the exit process. Exiting a Customer from a Program completes the service delivery for the Customer. If exiting a group of Customers, see the Record Group Program Exit page.





Enter Destination Information

Make certain all Customer records are up to date, including Services, Case Notes, and Milestones since this information may not be modified after Program Exit. If the Customer's income has changed since Program Entry, it should be changed in Central Intake before beginning the exit process (see *Update Income* below).

#	Step	Notes
1	Click **Program Exit** Page	*Make certain correct Customer is selected. Active Customer is displayed in tab at top*

		of page with Program. *Date Customer was enrolled is displayed on bottom tab.*
2	Click **BEGIN EXITING CUSTOMER OUT OF PROGRAM**	*Some Programs may be set up to exit Family or Household members, if so 'Select Household Members' popup window will be displayed.*
3	If Select Household Members popup window is displayed, uncheck Household member(s) who should NOT be exited from the Program and click **SELECT**	*Checked Customer WILL be exited.*
4	Entry and Exit Income will be displayed in the middle container and Exit Questions will be displayed in Exit Questions container	
5	If Income does not reflect current income from Demographics Page, see *Update Exit Income* below	
6	Select Destination and Reason for Leaving	
7	Enter Destination Address and contact information	*If new address is not known, enter UNKNOWN.*
8	Click **SAVE**	*Select Household Members popup window will be displayed again to show members who should have this information saved to their records.*
9	Uncheck Household member(s) who should NOT have information saved	*Checked Customers WILL have information saved.*
10	Click **SELECT**	

Answer Program Exit Questions

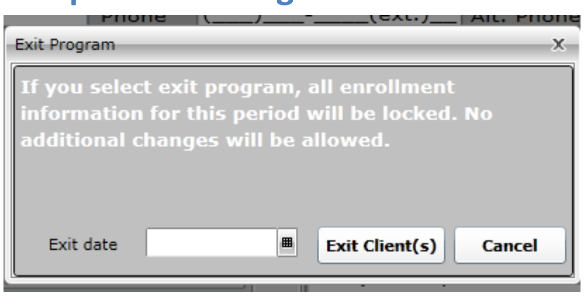
#	Step	Notes
1	Select Group	*Where there are many questions, selecting the appropriate Group will display only the questions that correspond with your Program or Activity.* *Group may not always be populated.*
2	Select or enter Answer for each question in Exit Question container	*Click **REQUIRED** to display only required questions.* *If multiple answers are permitted, check appropriate checkboxes.* *All answers will appear in QUESTION ANSWER GRID.*
3	Enter Comments when needed	
4	Click **NEXT** or the ENTER key to advance to next question, click **PREVIOUS** to go back to previous question	*Some questions/answers may have jump logic which display questions in an appropriate sequence based on your responses.*
5	Click **REFRESH** to clear your answers	
6	Click **SAVE** in the Exit Questions container after you have answered all the questions	
	If other Household members are being exited, you must answer their Exit Questions as well	***COPY TO HH** allows applying these answers to other household members.*

Update Exit Income in Program Exit Income Snapshot

The Exit Snapshot should reflect the Customer's Income at the time of program exit. If the income has not been updated yet before beginning the process, it can be updated on the Snapshot Management page. Any changes made to a Customer's income Snapshot will also be reflected in the snapshots of other family members, depending on program setup.

#	Step	Notes
1	Open **Snapshot Management** page	*Exit Program snapshot popup window will be displayed.*
	• Click **REFRESH** in toolbar if new snapshot is not displayed	
	• Make certain last SNAPSHOT is displayed	*Select Date in dropdown at top right. Snapshot Number should indicate the last one: 2 of 2, 3 of 3, etc.*
2	Update Customer Income	
	• Select Customer in Household Grid	
	• Click Income Tab in middle of page	
	• Select Income record in Income Grid	*Click **ADD** if additional income record needs to be added.*
	• Update Customer Income data	
	• Click **UPDATE**	
	• Change Non-Cash Benefits information at bottom of page if needed	*Popup window will display Non-Cash options.*
	• Click **SAVE NON-CASH BENEFITS**	
	• Repeat for additional household members if needed	
3	Click **UPDATE CENTRAL INTAKE** if needed	*This will update the Central Intake record with the new income information.*
4	Return to Program Exit page to finish the exit process	

Complete Exit Program Process



#	Step	Notes
1	Click **EXIT CUSTOMER OUT OF PROGRAM**	***EXIT CUSTOMER OUT OF PROGRAM*** *button will not be active until you click* ***BEGIN EXITING CUSTOMER OUT OF PROGRAM****.*
2	A popup window may be displayed listing all Family and Household members who were entered into the Program; all members will be checked by default	
	• Uncheck any members that should NOT be exited	

	• Click **SELECT** to close window	
3	A Confirmation popup window will appear; if unsure of Exit, click **CANCEL**	*The bottom grid displays the last services recorded.* *If services are scheduled for future dates, a message will ask you if you want to delete the schedules.*
	• Enter Exit Date	
	• Click **EXIT CUSTOMER(S)**	*Once a Customer is exited from a Program, her/his Program information may no longer be edited.*

Create Follow-up Record

Use this page to set follow-up Activities related to the Customer you are exiting from a Program.

#	Step	Notes
1	Click **FOLLOW UP**	*The **FOLLOW UP** button will be available only after the Customer is exited from the Program using the **EXIT CUSTOMER OUT OF PROGRAM** button.* *"Exit Program" popup window will be displayed.*
2	Create new Activity	
	• Click **NEW** in Follow-Up Activity container	
	• Select Consent Level	
	• Select Program Component	
	• Select Milestone	
	• Select Activity	
	• Select Staff	
	• Select Start Date	
	• Enter number of Units	
	• Click **SAVE** in Follow-Up Activity container	*Activity will appear in SERVICES GRID and Questions will appear in QUESTION LIST GRID.*
3	Answer questions in <u>Follow-up Questions</u> container	
	• Select Group	*Where there are many questions, selecting the appropriate Group will display only the questions that correspond with your Program or Activity.* *Group may not always be populated.*
	• Select or enter answer for each question in <u>Follow-up Questions</u> container	*Click **REQUIRED** to display only required questions.* *If multiple answers are permitted, check appropriate checkboxes.* *All answers will appear in the QUESTION LIST GRID.*
	• Enter Comments when needed	
	• Click **NEXT** or the ENTER key to advance to next question, click **PREVIOUS** to go back to previous question	

	• Click **REFRESH** to clear your answers	
	• Click **SAVE** in the Follow-up Questions container after you have answered all the questions	
4	Change Milestone Status if needed	
	• Click **>>** next to Milestone field	
	• In popup window, select Status of Milestone	*Completed.*
	• Select Date	
	• Enter Comments if needed	
	• Click **SAVE**	
	• Click **CLOSE** to close popup window	
5	Create additional follow up activities if needed	*All activities will appear in SERVICES GRID and Questions will appear in QUESTION LIST GRID.*
6	Click **CLOSE** when finished	

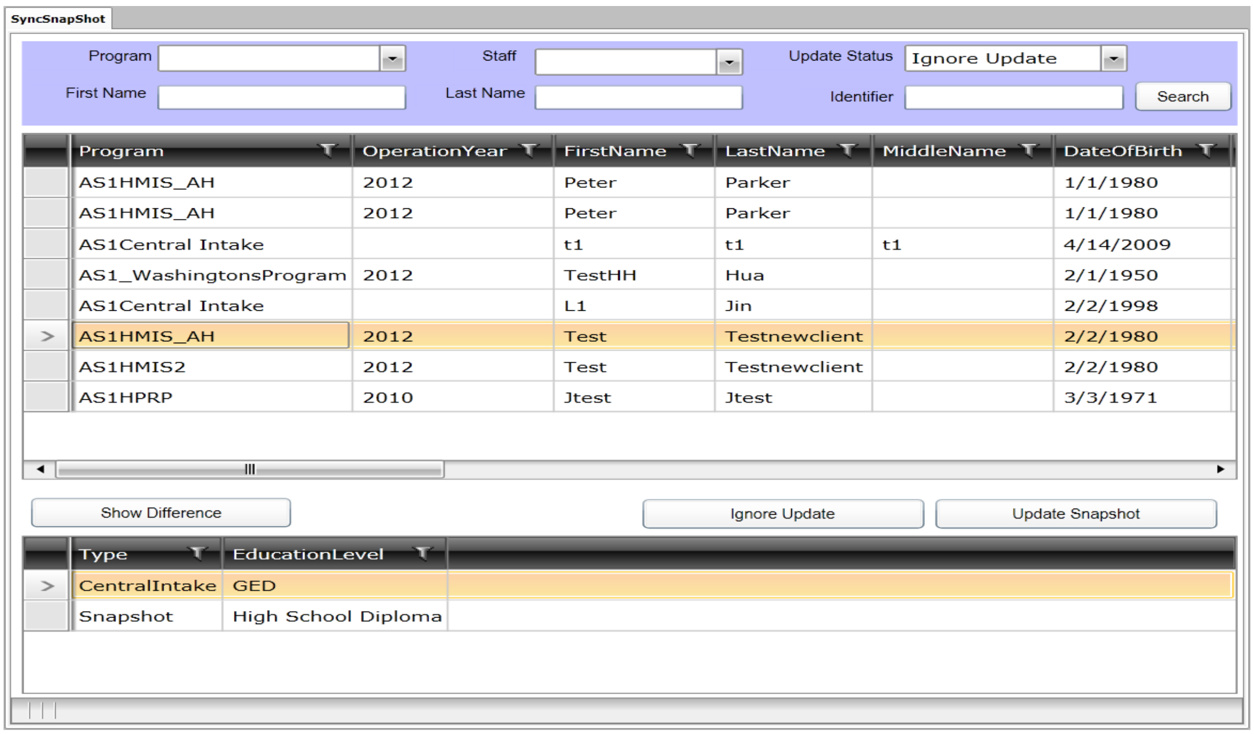
You have exited the Customer from a Program.

APPENDIX A

Sync Snapshot

This tool provides you the opportunity to search for specific Customer information and generate the differences between Central Intake data and Program Entry data to which the logged in User has access. The intent of this page is to allow the User to manage the synchronization of Central Intake household data and the Program Entry snapshot data. Changes in income will synchronize only to the latest Snapshot; changes to demographic data will synchronize to the Program Entry snapshot.

Changes made on the Snapshot itself on the Program Entry page will not be reflected here. If changes are made on the Snapshot itself, synchronization will no longer be possible, unless the Snapshot is reset.



#	Step	Notes
1	Select Search parameters	*Leave other fields blank to achieve a complete User related listing.*
	• Select **Update Status** ○ **Ignore Update** – records that the User chose not to sync in Central Intake ○ **Update Snapshot** – records that were synced in a different Organization	*Update Status is required.*
	• Select Program and/or Staff	*Not required*
	• Enter Customer First and/or Last Name or Identifier	*Allows searching for one Customer record; not required*
2	Click **SEARCH**	*Matching records will be displayed in grid. Customers may have a record for each Program Entry; if using a Central Intake Eligibility Assessment, there may also be a*

		Central Intake record.
3	Select Customer record in the Grid	
4	Click **SHOW DIFFERENCE**	*The GAP between the snapshot and Central Intake will be displayed in the bottom grid; each column will show the current value. Income and Non Cash will not show values, but will not be displayed unless there is a Gap.*
5	Select one of the following functions:	
	• Click **IGNORE UPDATE** to do nothing	*This effectively cancels the request.*
	• Click **UPDATE SNAPSHOT** to synchronize the selected record	*The selected snapshot record will be synchronized.*

APPENDIX B

Reporting Issues to HMIS Administrator

When an issue arises and help is needed from the HMIS Administrator, follow the procedure listed below:

Get a screen shot of the issue. For most computers, getting a screen shot is easy:

1) Hit the 'Print Scrn' key on the keyboard.
2) Start a new email address to: DBH-HMISHelpdesk@dbh.sbcounty.gov
3) In the body of the message after typing a description of the issue, right click the mouse button and press paste.

Users of Windows XP/Office/Outlook can use their Print Screen Key (PrtScn) and paste (Ctrl+V) the resulting screen shot directly into an email message or any other Office program (like Word) that supports images. Note that this does not apply to text based e-mail.

Windows print screen images are saved in .bmp (Bitmap) format.

Using one of the above two methods - full screen capture or open window only capture - go through the following 3 simple steps to capture a screenshot and send it via e-mail:

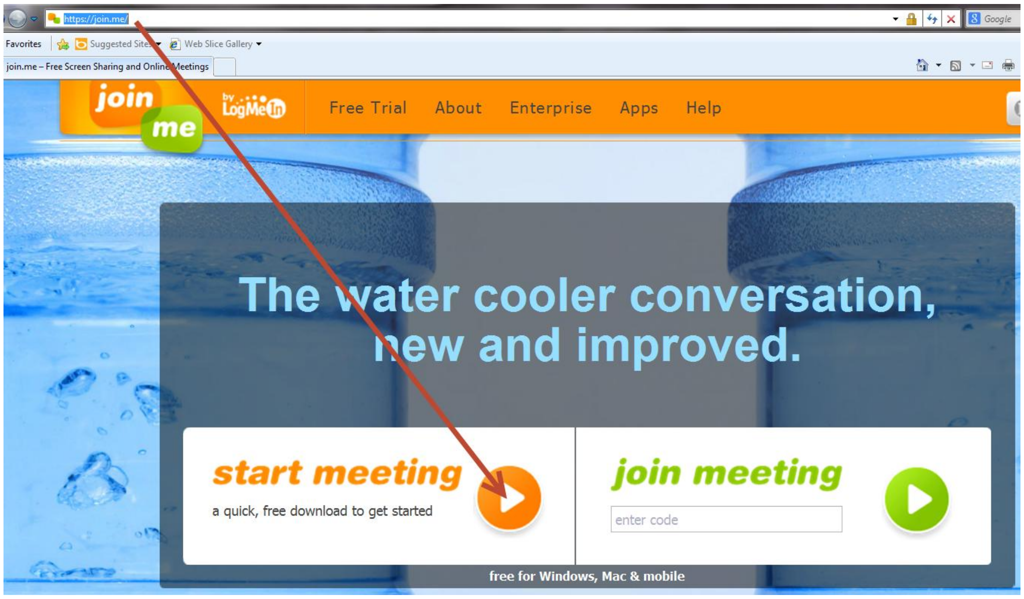
1) Take your full screenshot by pressing the Print Screen Key or...take your open window screenshot (currently selected window) by pressing the Alt + Print Screen Key.
2) Open a new email message and position your cursorwhere you would like your captured image to be placed.
3) Press Ctrl + V to paste the captured image into your new email.

In summary, it is this simple...

•Print Screen > New Email > Ctrl + V > Send Email

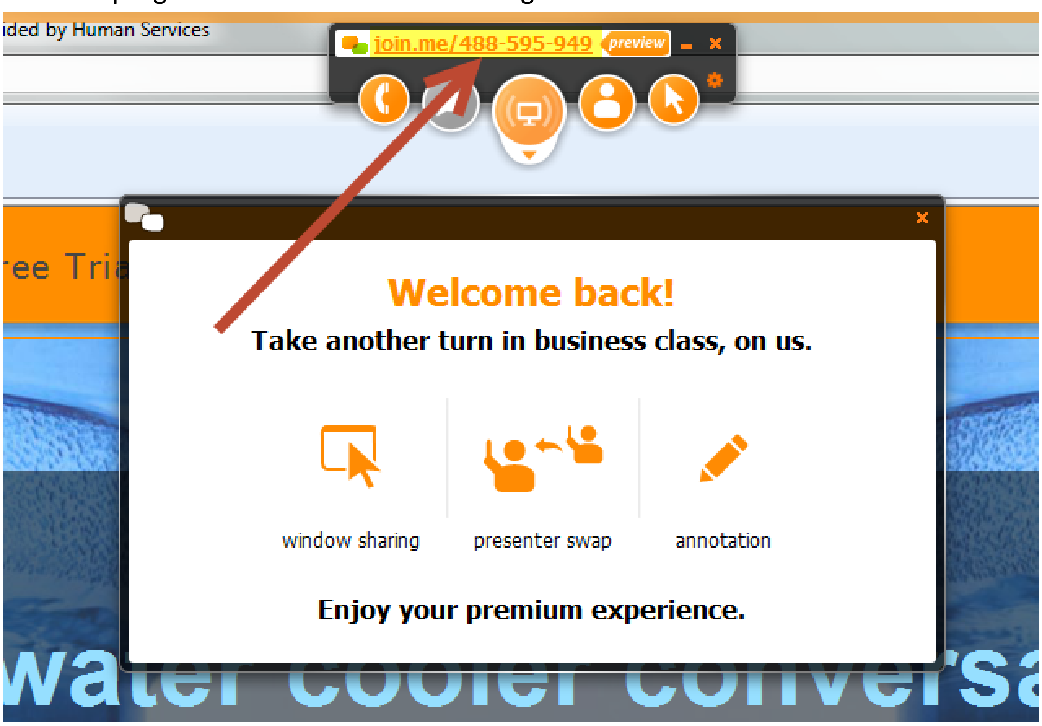
Screen Sharing

Sometimes it may become necessary to share screens in order to explain what the issue is. Join.me is one solution for that.



The person that is having the issue starts the process by going to: https://join.me/ and pressing the start meeting button.

Once the program loads look for the meeting number:



Relay that number to the HMIS Administrator and then you can show what exactly is happening.

GLOSSARY

Terms

Term	Definition
Activities	Staff performed services to assist individuals and Customer
Application	Designation given to the collection of pages in the system used for a specific type of program, i.e. HMIS; only one Application can be used at a time
Consent Level	Determines which members of your organization may view the information being entered
Consent Refused	When Customer chooses not to share and personal information with your organization
DOB	Date of birth and must be entered as mm/dd/yyyy format
Family	The grouping of Customers in a Household who are related by blood, marriage or adoption;
Head of Household (HOH)	There may only be one HOH per household; Household is the grouping of Customers who live at the same address
Household Auto Enroll Program	All Household members are automatically enrolled in a Program when one member of Household is enrolled in the Program
Milestones	Interim Customer results; steps taken to achieving a target outcome
Organization	An Agency set up to use the system
Program	Program within the Organization; it will include one or more Program Components, Target Goals and Activities
Program Component	A sub level of a Program designated to a narrowly focused process provided by agency staff members to individuals and Customers; it includes unique Activities and Milestones
Snapshot	A recording of all demographic, income and household information at the time a customer enters and exits a Program
SSN	Social Security Number