HOMELESS MANAGEMENT INFORMATION SYSTEM

Monterey-San Benito Continuum of Care

March 2019

HMIS 5.12

Agency Admin Manual

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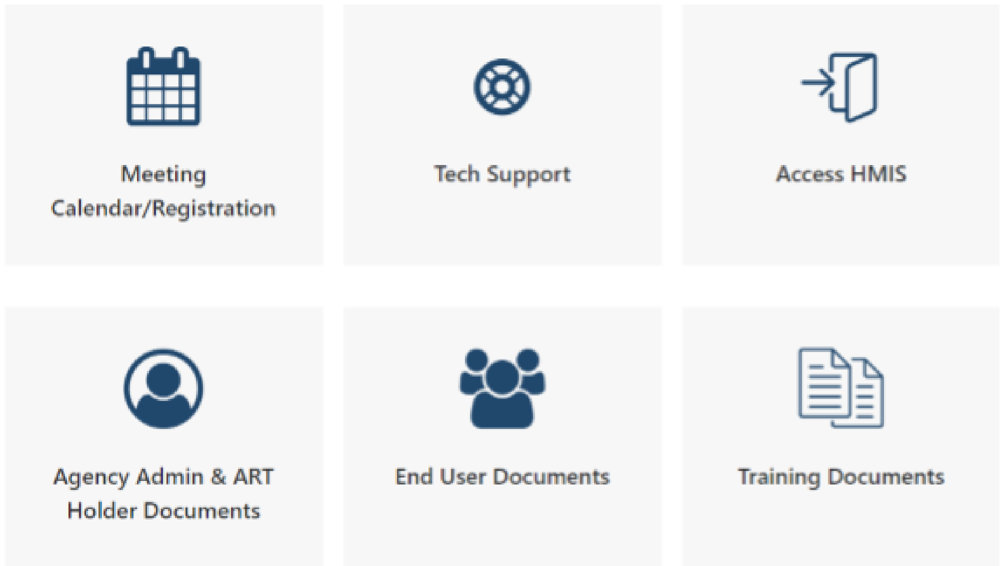
Access HMIS Web Portal

Access the Monterey-San Benito portal at: https://www.chspmontereycounty.org/hmis/

Below the **What is a Homeless Management Information System (HMIS)**, you will see 6 Icons. Please see descriptions below.

The Six (6) Icons:

- **Meeting Calendar/Registration:** register for upcoming training.
- **Tech Support:** Send HMIS related questions.
- **Access HMIS:** select from 'Access HMIS' or 'Access HMIS w/ PKI
- **Agency Admin & ART Holder Documents:** Up to date current HMIS documents.
- **End User Documents:** documents and forms.
- **Training Documents:** Training documents and information from HMIS User Group and New User meetings.



What is an Agency Admin?

Relationship with Community Technology Alliance (CTA)

CTA offers a unique combination of technical expertise, government regulatory knowledge and non-profit understanding to build systems collaboratively with communities and service agencies to prevent homelessness.

CTA is your HMIS System Administrator, providing a variety of services, including:

- Customize HMIS for your Agency (e.g. create/edit Assessments and pick lists)
- Generate AHAR, CoC APR and other specialized reports, plus provide assistance for generating other reports
- Merge duplicate clients (same client entered in HMIS more than once)
- HMIS training for all levels of access and use of the database

The Coalition of Homeless Services Providers (CHSP)

The Coalition of Homeless Services Providers is your HMIS lead agency and is responsible for coordinating training, deployment and first and second tier support. CHSP works closely with CTA and partner agencies in preparing HMIS data for distribution to government agencies. **The HMIS Data Coordinator is your first line of contact outside of your agency regarding HMIS related issues. Issues that cannot be handled at the CHSP level will be then escalated to CTA.**

Duties of an Agency Administrator

An Agency Administrator duties include:

- Ensure all users have completed HMIS Confidentiality training;
- Ensure your agency meets all HMIS security requirements as detailed in HUD Data and Security Standards;
- Maintain current HUD Standards data for each Provider
- Add, edit or delete users from your agency;
- Provide or arrange for user trainings;
- Ensure your agency has procedures focusing on accuracy in data quality;
- Check and respond to data quality reports;
- Communicate procedures changes to users;
- Set up and maintain your agency/program HMIS profiles. This includes setting security defaults; setting up bed lists; and creating service and referral quick lists.

PKI Security Protocols

Overview

Only authorized Agencies may access the HMIS database. In order to access the database an Agency must provide CTA with their Agency's static IP address. An IP address is the address your Agency uses to access the Internet. A static IP address is one that does not change over time (unlike a dynamic address which changes over time).

If your Agency has a dynamic IP address, or if your Agency permits their HMIS users to access the database when away from your Agency's physical address, then CTA must supply your Agency with a PKI (Public Key Infrastructure) certificate. The certificate allows a user to access the database without a static IP address and/or when away from your Agency's physical address.

Not sure what type of IP address your Agency has? Contact your IT department or your Internet Provider to find out if your Agency has a static or dynamic IP address.

Installing PKI

Contact the HMIS Data Coordinator to request a PKI certificate. Once a certificate is generated, you will typically receive the certificate via email as a file attachment:

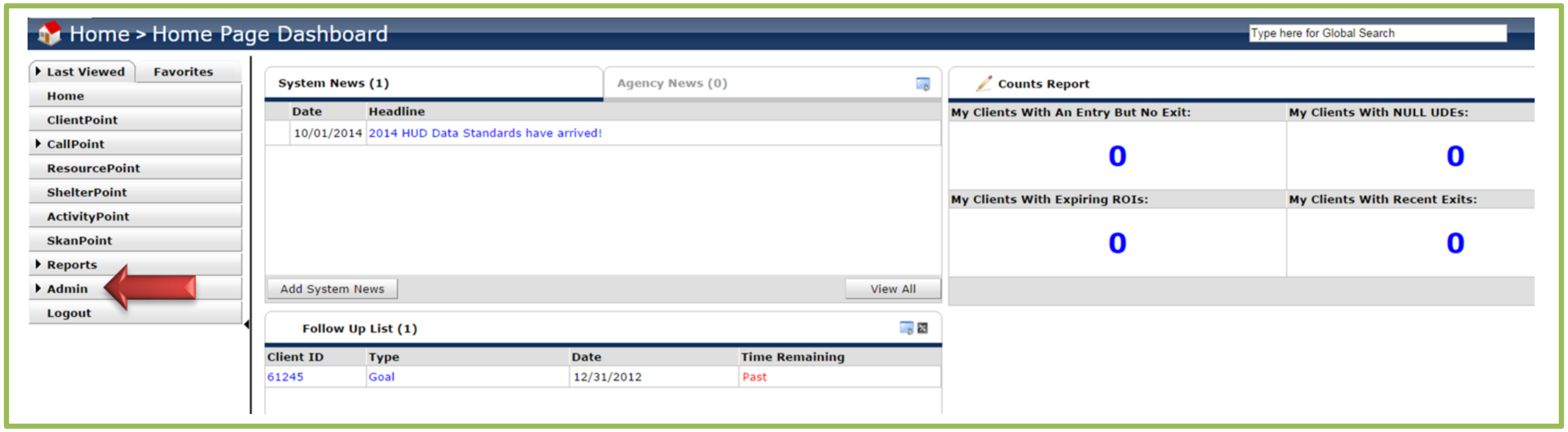
- Click on the certificate (the file attachment)
- **Certificate Import Wizard** page will appear. Click **Next**
- **File to Import** page will appear. Click **Next**
- Enter the PKI password (CTA will provide a password). Click **Next**
- **Certificate Store** page will appear. Click **Next**
- **Completing Certificate Import Wizard** page will appear. Click **Finish**
- PKI certificate is installed. As long as the PKI certificate is valid, there is no need to go through the installation process again

Note:

- The certificate must be installed on each computer accessing the HMIS database
- The certificate is valid for up to two years. Once a PKI expires, a new certificate will be distributed and must be installed on each computer accessing the HMIS database

Access Admin Dashboard

Access HMIS by entering your username and password. Your Home Page Dashboard appears



Menu Bar (left side of screen)

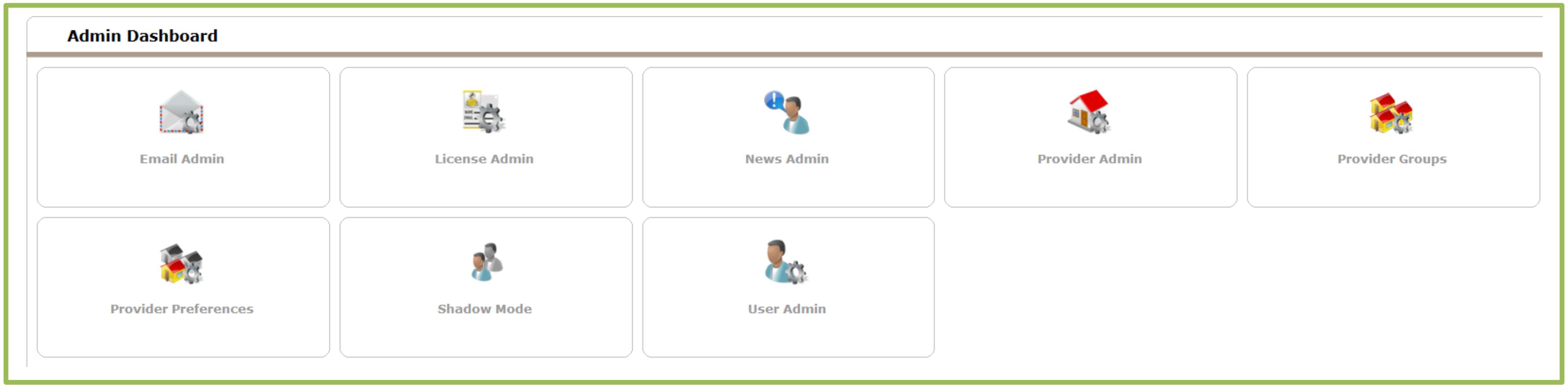
Click to access **Admin** (red arrow) or other available option.

Note: Not all modules displayed in this screenshot may display. Example: you may not see **Call Point**.

Available modules depend on your access level and the modules your agency has selected to use.

Admin functions

Clicking **Admin** brings you to the **Admin Dashboard** page.



The Icons:

Email Admin: this feature is not used.

License Admin: this feature is only beneficial to CHSP as partner agencies do not control license distribution.

News Admin: add news items (information that will appear on a user's homepage dashboard).

Provider Admin: displays all the providers in your agency. Able to access a provider to make changes to configuration.

Provider Groups: create Reporting Groups. This allows you to run an ART report for multiple providers.

Provider Preferences: contact your CTA representative for assistance in updating Provider Preferences.

Shadow Mode: allows you to shadow a user (to see what the user sees in HMIS).

User Admin: add new user; delete user; activate or deactivate user; reset password; add or delete providers from user's profile.

Provider Admin

Clicking **Provider Admin** takes you to the Provider Search page.

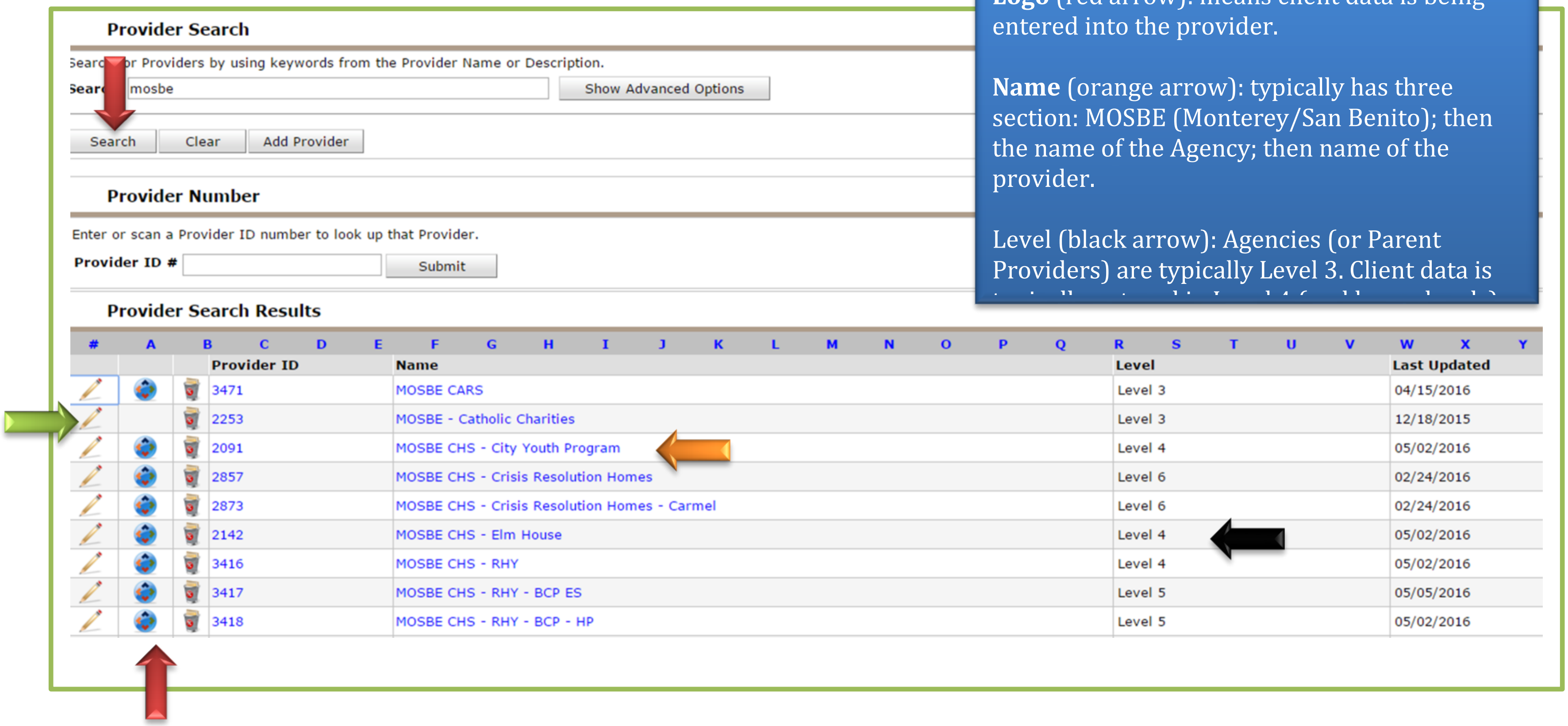
Want to display a list of all provider in your Agency? Click Search (red arrow)

Pencil (green arrow): click to access the provider's configuration.

Logo (red arrow): means client data is being entered into the provider.

Name (orange arrow): typically has three section: MOSBE (Monterey/San Benito); then the name of the Agency; then name of the provider.

Level (black arrow): Agencies (or Parent Providers) are typically Level 3. Client data is



Provider Groups

Reporting Groups allow Administrators to run reports on groups of providers.

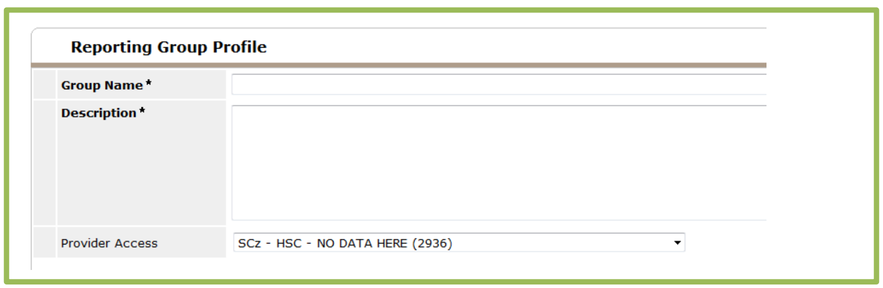
Clicking **Reporting Groups** takes you to the **Visibility Groups Search** page.

Click **Reporting Groups** (blue arrow).

Click **Search** (orange arrow) to if your agency has created any reporting groups.

Click **Name** to see which providers are in that group, or to add/delete providers.

Need to create a new reporting group? Click **Create New Group** (red arrow)

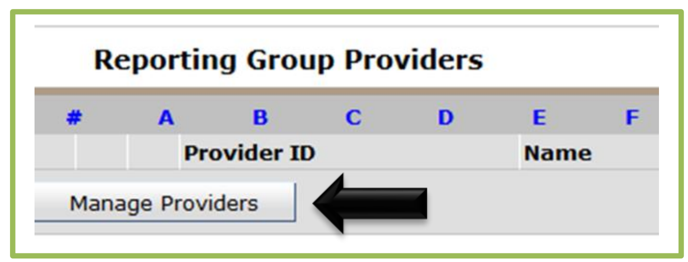


Group Name: enter the name of the reporting group.

Description: entering data is optional.

Provider Access: defaults to your default provider. Change if necessary.

Click **Save**.



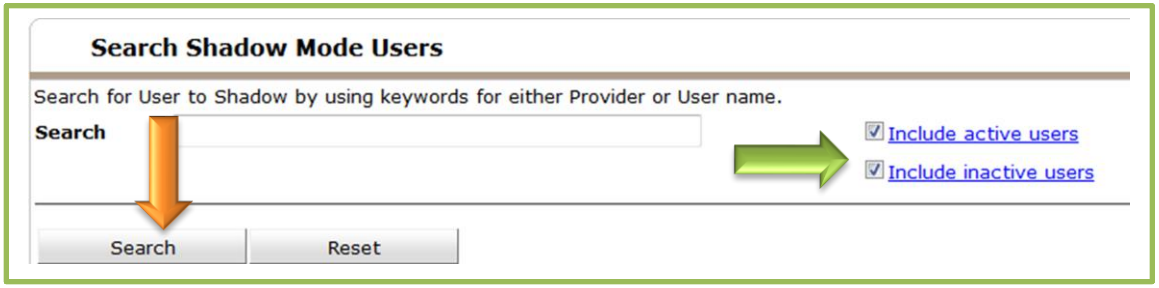
Reporting Group Providers box appears. Click **Manage Providers** (black arrow)

Click the green circle to the left of the provider you want to add. Repeat until all providers added. Then click **Exit**.

You have created a new Reporting Group that can now be used in running an ART report.

Shadow Mode

Shadow Mode allows you to see what another HMIS user in your agency sees on their screen. Shadow Mode is for troubleshooting, not for entering data.



<u>Do not</u> enter client data while shadowing someone.

As an Agency Admin: your access level trumps a case manager's level.

If you enter data in a client's file, no one but you and your CTA representative will be able to update that data field.

Click **Include inactive users** box (green arrow).

Click **Search**. A list of all active and inactive HMIS users in your agency will appear. Click on the name of the person you want to shadow.

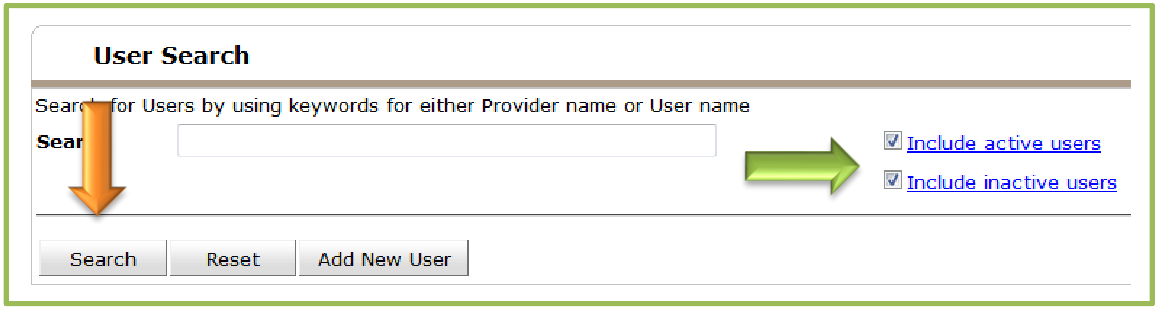
Look to the top right of your screen. The person's name will appear to the right of **Shadow**.

Does this person have access to more than one provider? Click **Enter Data As** and select the correct provider.

Time to exit Shadow Mode? Click on the person's name.

User Admin

User Admin allows you to add, update or delete HMIS users; update a user's account so s/he can enter data in multiple providers; and reset passwords.



Click **Include inactive users** box (green arrow).

If searching for an existing user, type in any portion of their name in the search box.

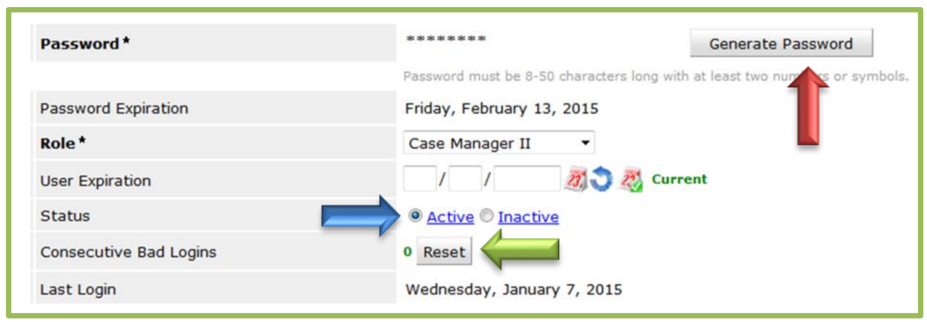
Click **Search** to display a list of all active and inactive users in your agency.

Need to add a new user or delete a current user?

File a case at https://www.chspmontereycounty.org/hmis/help-desk-request/ to request assistance with adding/deleting user.

How to reset a password

- Click on the person's name
- Scroll down until you see **Password***
- Click **Generate Password** (red arrow). A random number of letters/numbers will appear. You can change the password if you want
- Click Reset to show a green 0 (green arrow)
- Click **Save & Exit**



How to activate a user

- Click on the person's name
- Click **Active** (blue arrow) so circle is blue
- Click **Save & Exit**

Let the person know their new temporary password. After entering their temporary password, the person will be prompted to create their own password. Their password must be at least 8 characters in length and 2 of those characters must be numbers or symbols.

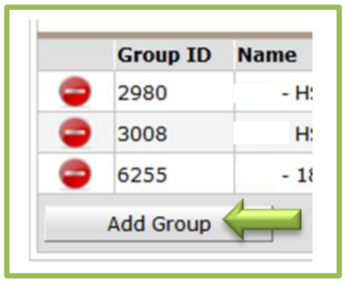
User Admin

How to allow user to "Enter Data As"

Each HMIS user is assigned a default provider. This is the provider the user has access to in order to enter client data.

If the user needs to enter data in other provider, you will have to grant the user 'enter data as' rights:

- Access the user's HMIS account
- Look to top right of screen. Click **Enter Data As Groups** (blue arrow)
- The **Enter Data As Groups** page appears

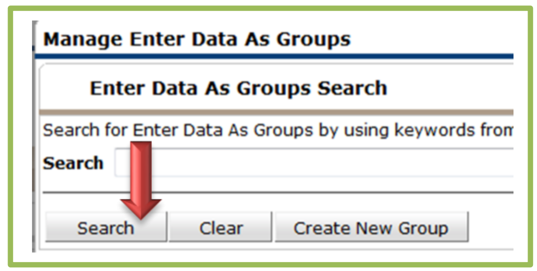


Click **Add Group** (green arrow)

Manage Enter Data As

Click **Search** (red arrow) to your agency.

Click the green circle of the will appear on the users **Enter**



Groups page appears.

display all providers in

provider to add. Provider **Data As Groups** page.

Need to add more providers?

- Repeat the above process: click **Add Group**; click **Search**; click green circle  to left of the Provider you want to add
- Click **User Information** when done adding providers
- Click **Save & Exit**

Need to delete a provider from the user's Enter Data As Groups?

- Click on the red circle to the left of the provider

Access Levels

Each HMIS user is assigned an access level. The access level determines which ServicePoint features the user can access. Your CTA representative will ask you what access level to give new users. Here are the various access levels:

Resource Specialist I

Resource Specialist I users are limited to the *ResourcePoint* module. This allows users to search for area providers and view their details. These users have no access to client data.

Resource Specialist II

Resource Specialist II users have access to *ResourcePoint*, plus have the ability to update their own organization's information. To perform these tasks, they also have access to Admin Providers and Agency Newsflash.

Resource Specialist III

Same as Resource Specialist II, but also includes access to System Newsflash and limited range of reports.

Volunteer

Volunteers have access to *ResourcePoint*. These users can also view or edit basic demographic information about clients on the **Profile** screen, but they are restricted from viewing other assessments. A volunteer can create new client records, make referrals, or check clients in and out of shelters. Administrators often assign this user level to individuals who complete client intake and refer clients to agency staff or a case manager. In order to perform these tasks, volunteers have access to some areas of *ClientPoint* and *ShelterPoint*.

Most HMIS users will have Case Manager access

Case Manager I

Case Managers have access to all *ServicePoint* features except those needed to run audit reports and features found under the *Admin* tab. They have access to all screens within *ClientPoint*, including assessments and service records.

Case Manager II

Same as Case Manager I, plus can create/edit client infractions.

Case Manager III

Same as Case Manager II, plus have the ability to see data down the agency's provider tree like an Agency Admin.

Reporting

Counts Reports via Dashlets

A counts report allow to keep tabs on critical data points (example: how many clients are currently enrolled in programs). You can select up to 4 Counts Reports. Here are the options for Program Manager level Counts Reports:

Counts Reports are also available for your case managers. Open a case for assistance with setting up counts reports for your staff.

My Clients Lists all clients that have you listed as a case manager	**My Clients Currently Checked into a Shelter** Lists all clients who are currently checked into one of the specified providers' unit lists and have you listed as a case manager	**My Clients with a Follow Up Scheduled** Lists all clients that have a follow up scheduled within the specified date rante and have you listed as a case manager
My Clients with an Entry but no Exit Lists all clients that have an Entry/Exit record for the specified providers with an entry date in the specified date range but no exit date and have you listed as a case manager	**My clients with Expiring ROIs** Lists all clients that have an ROI for the specified providers with an end date during the specified date range and have you listed as a case manager	**My Clients with No Goals Set** Lists all clients that do not have a goal set for the specified provider in the specified date range and have you listed as a current case manager
My Clients with No Recent Activity Lists all clients who do not have any recent case activity associated with the specified providers within the specified date range and have you lsited as a current case manager. (Case activity is composed of goals, goal case notes, and goal action steps.)	**My Clients with No Recent Case Notes** Lists all clients that do not have a case note associated with the specified providers within the specified date range and have you listed as a current case manager	**My Clients With No Shelter Stays** Lists all clients created by the specified providers that have no shelter stays during the specified date range and have you listed as a current case manager
My Clients with NULL UDEs Lists all clients xreated by the specified providers that have a NULL Universal Data Element and have you listed as a current case manager	**My Clients with Outstanding Referrals** Lists all clients who have an outstanding referral made by the specified providers during the specified date rance have have you listed as a case manager. An outstanding referral is one that has not had a service provided and the need status is not 'Closed' and the need outcome is not 'Fully Met'.	**My Clients with Recent Exits** Lists all clients who have an Entry/Exit record for the specified providers with an exot date that is in the specified date range and you are listed as a current case manager
My Clients with Unserved Needs Lists all clients who have at least one unserved need and have you listed as a current case manager. An unserved need is defined as a need that does not have a corresponding service.	**My Clients with No Recent Entries** Lists all clients who have no Entry/Exit records for the specified providers with an entry date that is in the specified date range and have you listed as a current case manager	

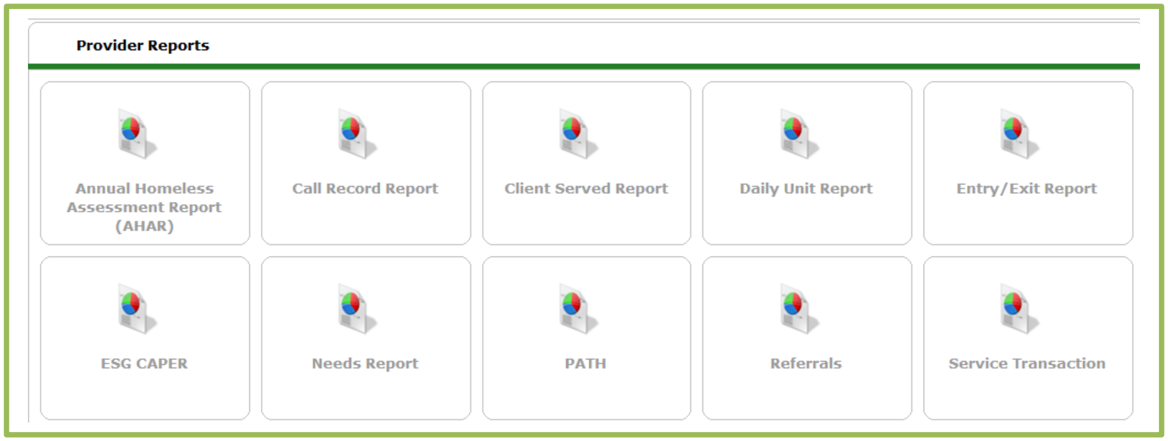
Reporting

Provider Reports

HMIS users with an access level of Case Manager I and above have the ability to view and run Provider Reports. Resource Specialist III can run only the Daily Unit and Outstanding Referrals Report.

Provider Reports provide real-time data on clients. Requiring users to periodically run Provider Reports can greatly decrease the number of data quality issues that need to be addressed when it is time to submit funder reports.

Report highlighted in green: CTA recommends Agency Admins and HMIS users run this report on a regular basis.



Annual Homeless Assessment Report (AHAR): run by CTA.

Call Record Report: (available only to Call Point users) View clients, needs and outcomes.

Client Served Report: Provides information (demographics, services provided) on who is being served and how they are served.

Daily Unit Report: (for Shelters) View a list of clients who have occupied beds in your shelter.

Entry/Exit Report: Provides information on how many clients were enrolled during the date range; how many are leavers and stayers; and how many clients are currently enrolled.

ESG CAPER: Generates the ESG portion of the CAPER CR-65 ESG Persons Assisted.

Needs Report: View needs and needs outcomes for clients in one or more of your providers.

PATH: (must use PATH entry type) Details outreach and enrolled clients, demographics and services provided.

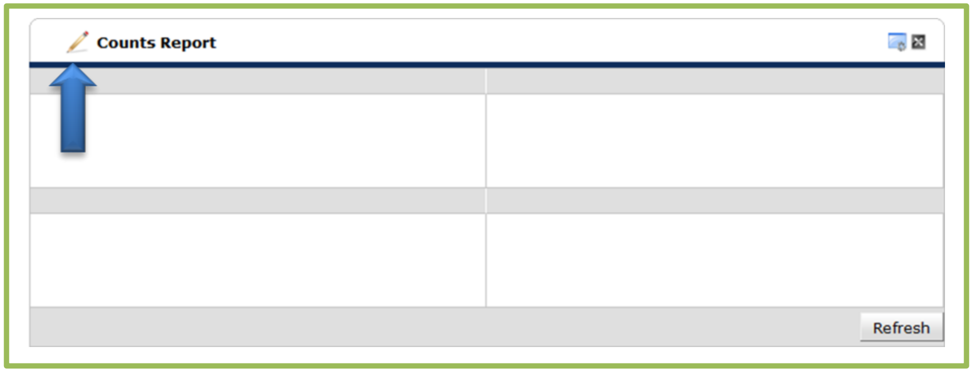
Referrals: Details clients referred by your provider; referrals to your provider from another provider.

Reporting via Dashlets

Counts Reports for Agency Admins

A counts report allow to keep tabs on critical data points (example: how many clients are currently enrolled in programs). You can select up to 4 Counts Reports:

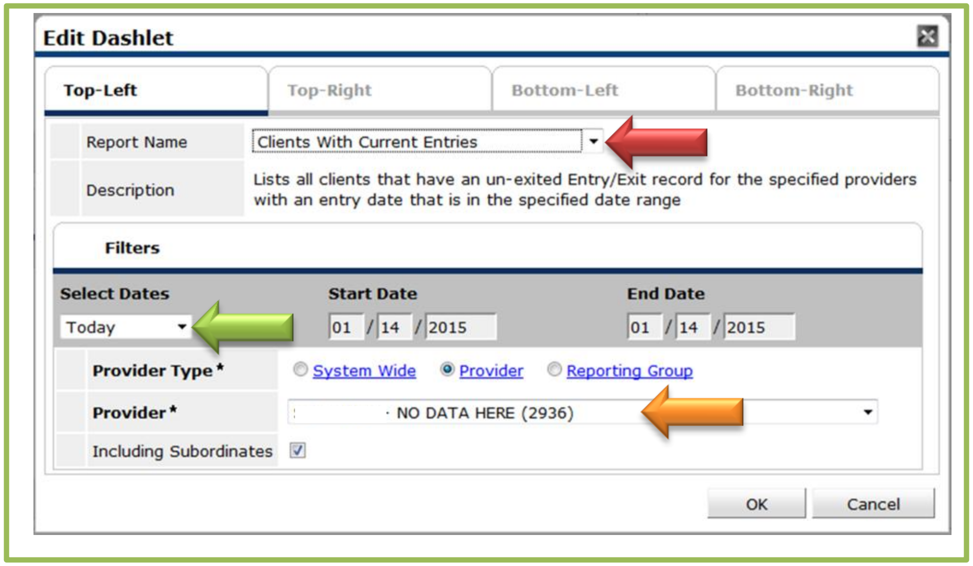
- On your homepage, click the arrow next to **Customize Home Page Dashboard**
- Click **Add Counts Report**
- Click the pencil icon (blue arrow)
- **Edit Dashlet** appears
- Click **Top-Left** tab



In this example the following **Program Manager** report was selected:

- **Clients with Current Entries** (red arrow)
- **Select Dates**: **Today** (green arrow). Other options include: Month, Quarter, Year
- **Provider**: select best match from drop down menu
- Click **Including Subordinates** (if there is more than one program involved)
- Click **OK**
- Repeat the above process for the other tabs

In this example: the Agency Admin will see all clients enrolled in any agency program on the day the Agency Admin accesses his/her HMIS account.



Open a case for assistance in setting up your four (4) Counts Reports

Reporting

Running the Client Served Report

Choose Reporting Group: click if want to run this report for 2 or more providers. Note: must have created the Reporting Group prior to running this report.

No Reporting Group? Go to Provider.

Provider: select from drop down menu:

- Defaults to **This provider ONLY**
- Select **This provider AND its subordinates** if the provider has subordinate providers

Services: defaults to Services Provided

- Select **Shelter Stays** if provider is a shelter
- Select **Referrals** if you want information on referred clients

Grouping: defaults to **Clients Receiving Services as a Family** (if the first service provided is within the date range, age will be calculated from the start of that first service).

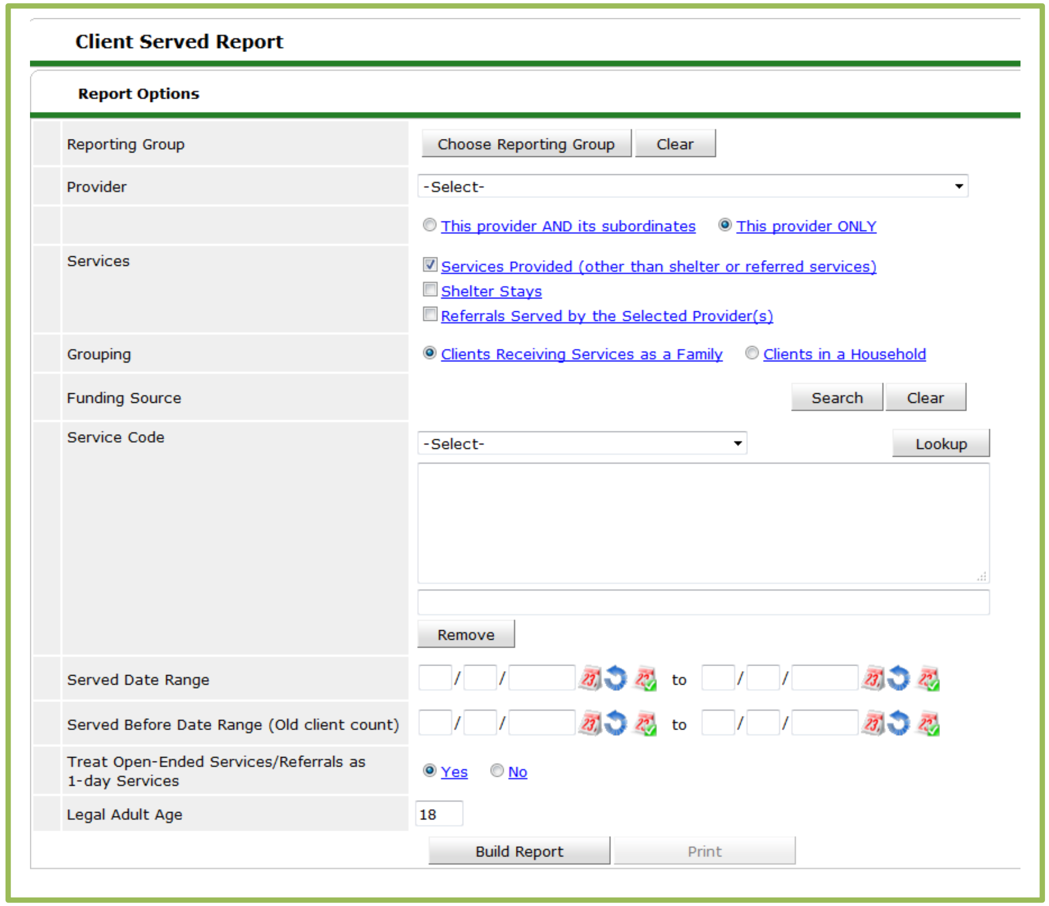
- Select **Clients in a Household** if the first service was provided before the reporting period. Age will be calculated from the start of the reporting period.

Service Code: select Service from drop down menu **<u>OR</u>**

- Leave blank. If no service selected: all clients who received any service during the reporting period will display.

Served Date Range: enter start date/end date.

Click **Build Report**



Reporting

Sample Client Served Report

The report will detail clients served (singles and families), age of adults and children, race, ethnicity, and the types of services provided.

Blue numbers: click to see a client list (HMIS number, name, unique ID).

There is a magnifying glass to the left of each client's HMIS number. Click on the magnifying glass to access the client's demographics (DOB, Gender, Race, Ethnicity) in order to review and update.

Clicking a blue number also gives you the option to Download Results (creates an Excel spreadsheet).

All Provider Reports detail real-time client data:

Meaning any changes made to the client's data will be seen the next time the report is run. Unlike ART, you do not have to wait until the next day to run the report in order to see changes.

CLIENTS SERVED	Old	New	Total
A. Adults	**0**	**408**	**408**
Never Specified	0	0	0
Male	0	300	300
Female	0	105	105
Transgender	0	2	2
Unknown	0	0	0
B. Children	**0**	**2**	**2**
Never Specified	0	0	0
Male	0	1	1
Female	0	1	1
Transgender	0	0	0
Unknown	0	0	0
C. Total (A+B)	**0**	**410**	**410**

FAMILY MEMBERS	Children			Adults					
	0-5	6-12	13-17	18-30	31-50	51-61	62+	No DOB	Total
Never Specified	0	0	0	0	0	0	0	0	0
Male	0	0	0	0	0	0	0	0	0
Female	0	0	0	0	0	0	0	0	0
Transgender	0	0	0	0	0	0	0	0	0
Unknown	0	0	0	0	0	0	0	0	0
Total	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**
SINGLES	**Children**			**Adults**					
	0-5	6-12	13-17	18-30	31-50	51-61	62+	No DOB	Total
Never Specified	0	0	0	0	0	0	0	0	0
Male	0	0	1	47	143	76	20	14	301
Female	0	1	0	13	50	33	7	2	106
Transgender	0	0	0	0	2	0	0	0	2
Unknown	0	0	0	0	0	0	0	0	0
Total	**0**	**1**	**1**	**60**	**195**	**110**	**27**	**16**	**410**