HOMELESS MANAGEMENT INFORMATION SYSTEM 5.8

MOSBE: Salinas/Monterey, San Benito

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HMIS 5.8 Workflow

Programs using Program Entry

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Version 5.8 Overview

HMIS version 5 has a new look, along with three new navigational features:

- **Home>Main Dashboard**
- **Client Profile Summary and Work Flow Menu**

Home>Main Dashboard

The Dashboard appears when you log on HMIS. Up to 4 **Counts Reports** will load. Which reports display will depend on the user's access level. Case Managers can view up to 4 reports, such as:

- My Clients
- My Clients with expiring ROIs
- My Clients with null UDEs
- My Clients with entry but no exit

Counts Reports
Able to 'tag' a client so you can quickly review the client's status.

Example: **My Clients with NULL UDES** will let you know if any tagged client is missing one or more universal data elements.

Client Profile Summary

The **Client Profile Summary** appears after searching for a client. The Summary can be configured with up to 8 screens (or dashlets). Example: a case manager could have these 4 dashlets:

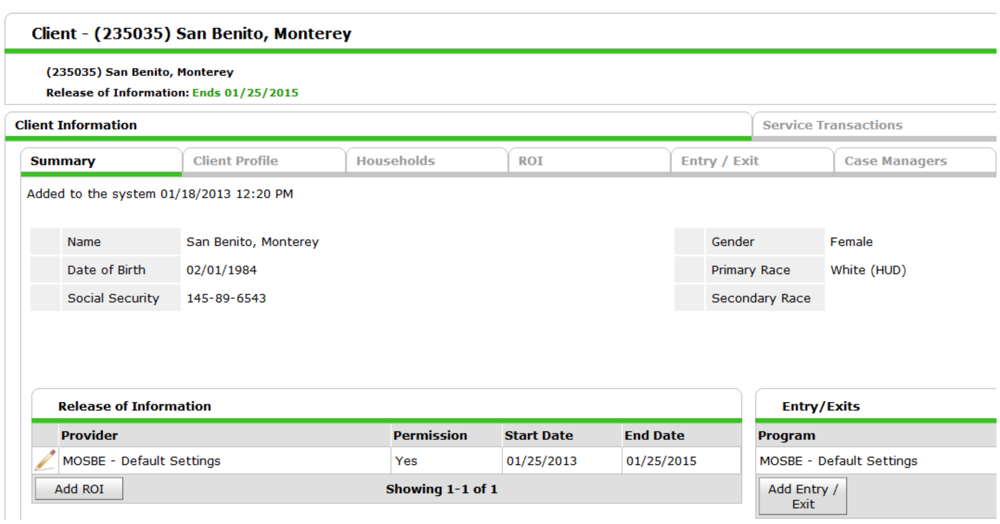
- Release of Information
- Households
- Services
- Entry/Exits
- Case Managers

The MOSBE Profile – Program UDEs assessment appears at the bottom of the page.

Using the Client Profile Summary The Summary Profile Summary is configured so a client's entire HMIS file can be accessed from this page. This means less time navigating back and forth between pages.

Client Summary not configured with dashlets you need? Contact your Agency Administrator or CTA representative to learn how to update your Summary.

Example of a Client Profile Summary (partial screen shot)



Icons

	Print with signature lines
	Add to Favorites
	Attach photos and documents

MOSBE CoC Landing Page

Address: https://monterey.bayareahmis.org/default.aspx

Accessing the MOSBE CoC Landing page allows you to:

- **Access Service Point (HMIS)**
- **Sign up for upcoming trainings**
- **Access and print forms and documents**
- **Request assistance from CTA by using the Request Help link**

Clicked PKI access and still can't access HMIS? Your computer either does not have a PKI or your PKI has expired.

Use the Request Help form to request a PKI.

To access **ServicePoint**
PKI access to **ServicePoint**
Sign up for **Training**

MOSBE Landing Page (left side of screen)

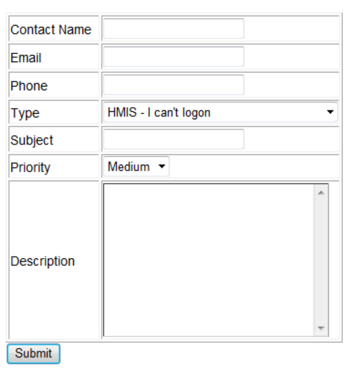
To access ServicePoint: click to access HMIS log-in page.

PKI access to ServicePoint: click to access the HMIS log-in page if a PKI certificate. A PKI certificate is needed if your program's IP address is not on file with CTA, or if you need to access HMIS when not at your work place.

Sign up for Training: click to review and sign up for upcoming training(s). When you sign up for a training you will receive an email confirming you are signed up. You will receive another email 2 days prior to the training.

Green Menu bar (top of screen)

- **Forms/Documents:** download or print various documents. Watch the confidentiality video and complete the quiz
- **Reports:** access data quality and other reports
- **Request Help:** let us know how we can assist you



Request Help form

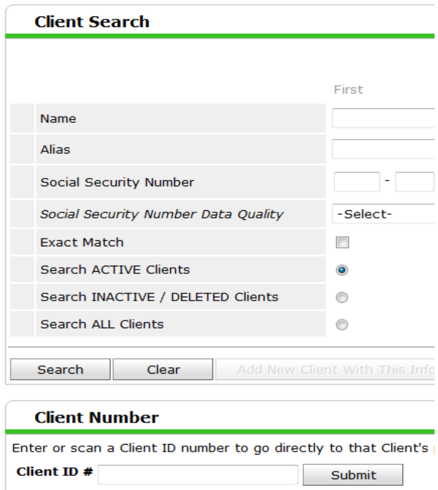
Click on **Request Help** tab (top right of screen) if you need assistance from your CTA representative. Complete the form and click the submit button.

Provide as much information as you can in the **Description** box so that your CTA representative can access how best to assist you.

Workflow: Table of Contents

Client Search

MOSBE is default open.
Client data (except entry/exits and case plans) can be seen by other HMIS agencies **unless**: the client's data is locked or the program is locked.



Logging into HMIS takes you to your **Home>Dashboard**.

Click **ClientPoint** to access the client data section of HMIS.

Is your client already in HMIS? Search for your client, by entering:

- **Name OR**
- **Social Security Number** & Social Security Data Quality **OR**
- **Client ID #** (HMIS # or scan card #)
- Click **Exact Match**
- Click **Search**

If there is NO match:

- Complete **Name**, **SSN**, **SSN data quality** fields
- Click **Add New Client with this Information**
- Pop up window will appear stating **Create Client?**
- Click **OK**
- Opens to the **Client Profile Summary** page

If there is a match:

If search by name or SSN: potential matches will appear at bottom of screen

- Click to left of Client's name
- You will be taken to the **Client Summary** page

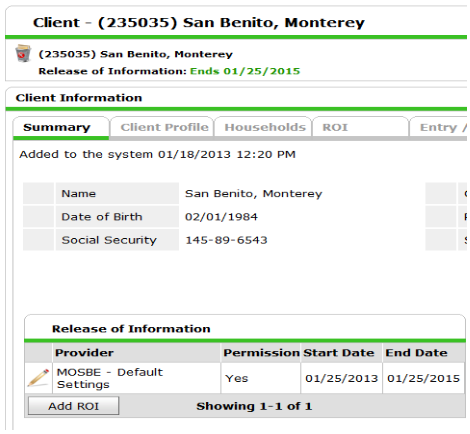
If search by client ID #: taken to the **Client Summary** page

What if client is new to my program, but is the client already in HMIS?

Even if the client was entered in HMIS by another program:

- Review the **Client Summary** page. Update UDEs if needed
- Add **Release of Information** (ROI)
- Tag client as **My Client**
- Create **Program Entry**
- Enter additional data as you would for any other client
- Go to next page for details on how to enter the above

Client Profile Summary



Profile Summary

The Profile Summary gives you an overview of current client data.

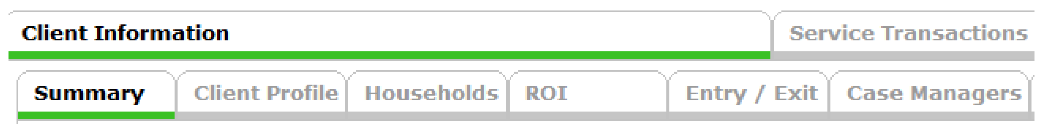
Your **Client Profile Summary** has likely been configured to include the following:

- **Demographic information**
- **Release of Information**
- **Entry/Exit**
- **Households**
- **Case Managers**
- **Services**
- **MOSBE Profile – Program UDEs**

Client's HMIS number, Name and ROI expiration date: top left of screen

Workflow Menu options

Below the client's HMIS # and name are a series of workflow tabs:



Client Information: the page you're currently on
Service Transactions: click to add a service transaction or create a referral

The next series of tabs (**Summary, Client Profile, Households**, etc) displays the correct workflow order for entering client data. Click on a tab to enter data for that tab (example: click **Case Managers** to tag the client as your client).

What are the boxes (known as dashlets)?

A dashlet allows client data to be entered without needing to leave the **Client Profile Summary**. The next page details how to enter data in each dashlet.

MOSBE Profile – Program UDEs

At the bottom of the page is the **MOSBE Profile – Program UDEs Assessment**, containing the data fields for the universal data elements (UDEs). UDEs are the questions HUD requires answered for clients entered in HMIS.

The demographics fields (date of birth, gender, etc) are empty. How do I add demographic information?

Entering data in the **MOSBE Profile – Program UDEs** data fields (bottom of the page) will populate the data fields in the demographic section

Profile Summary: Single Client

Workflow for entering a client not already entered in Client Point:

Client in a Household?

Go to next page for details on how to add clients in a household

Release of Information
- Click **Add ROI**
- Complete * data fields
- Other fields: optional
- Click **Save Release**

Households
- Leave this dashlet empty

Case Managers
- Click **Add Case Manager**
- **Type:** if you are the case manager, select **Me**
- If someone else the manager, select **ServicePoint** user or **Other**
- Complete the * data fields
- Click **Add Case Manager**

MOSBE Profile –Program UDEs
- Scroll down until the Program UDEs data fields appear. Enter data
- **Client not willing/not able to answer a question?** Select **Don't Know** or **Refused**
- Click **Save**

How do I …?

Attach a photo
- Click **Client Profile**
- Click **Change**
- Click **Browse**
- Locate photo. Click **Upload**

Attach ROI?

In the ROI dashlet:
- Click Page refreshes
- Click (top right)
- Click **Add New File Attachment**
- Locate document, click **Upload**

Print MOSBE Profile?

In the Entry/Exits dashlet:
- Click (left of date)
- Click **Save and Continue**
- Scroll down to bottom of page
- Click **Print Entry/Exit**
- Select options. Click **Print**

- Click **Add Entry/Exit**. Complete * data fields
- Click **Save Continue**
- **MOSBE Profile** assessment appears at bottom of page.
- Update **Profile** if necessary. If update, click **Save**
- Option to complete other **Assessments**
- Click **Save & Exit**

What do the check marks mean?

Not all data fields completed or not all data fields current

All required data fields complete and current

Services
- Click **Add Multiple Services**
- Complete * data fields
- **Provider:** makes sure correct program selected
- **Start Date/End Date:** defaults to current date. Change if needed
- **Services:** select from drop down menu
- **Funding Sources:** (optional)
- **Status of Need:** select from drop down menu (e.g. **Closed**)
- **Add another service? Click Add Another. Finished? Click Save**

Profile Summary: Household

Workflow for creating a new household ➔

Workflow for entering clients who are in a household and who are not already entered in HMIS:

- Search for and add the head of household. Write down their HMIS #
- Complete **MOSBE – All Program UDEs**
- Click **Save & Exit.** This returns you to the **Client Search** page
- Search and add the next member of the household. Write down their HMIS #
- Repeat the above process until all household members entered

Return to head of household's Summary page. Find the Households dashlet:

- Click **Start New Household.** Select Household Type
- **Client ID:** enter the HMIS # of the client you want to add
- Repeat above until all members added
- Click **Continue**
- **Head of Household:** answer **Yes** for head; answer **No** for all other members
- **Relationship to Head:** select best match from drop down menu
- Click **Save & Exit**

How do I …?

Attach a photo

- Click **Client Profile**
- Click **Change**
- Click **Browse**
- Locate photo. Click **Upload**
- Repeat for each member

Attach ROI?

In the HoH ROI dashlet:

- Click Page refreshes
- Click (top right)
- Click **Add New File Attachment**
- Locate document, click **Upload**

Print MOSBE Profile?

In the Entry/Exits dashlet:

- Click (left of date)
- Click **Save and Continue**
- Scroll down to bottom of page
- Click **Print Entry/Exit**
- Select options. Click **Print**
- Repeat for each member

From the Head of Household's Summary Profile:

Release of Information

- Click **Add ROI**
- Select household
- Complete * data fields
- Other fields are optional
- Click **Save Release**

Case Managers

- Click **Add Case Manager**
- Select household
- **Type:** if you are the case manager, select **Me**
- If someone else the manager, select **ServicePoint** user or **Other**
- Complete the * data fields
- Click **Add Case Manager**

Entry/Exits (see next page for more details)

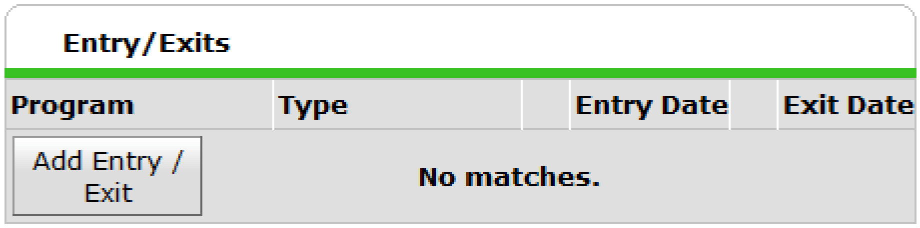
- Click **Add Entry/Exit**
- Select household. Complete * data fields
- Click **Save Continue**
- **MOSBE Profile** should already be completed for all members. Optional to complete other displayed assessments
- Click **Save & Exit** when all data entered for the client

Services

- Click **Add Multiple Services**
- Select household member(s). Complete * data fields
- **See previous page for details on how to enter services** (Services box)

Program Entry

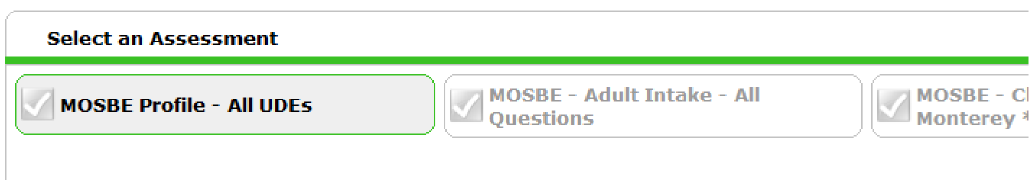
Locate the Entry/Exits box on the client's Profile Summary page:



Workflow for creating a program entry for a SINGLE client ➔

- Click **Add Entry/Exit**
- **Provider:** select correct program
- **Type:** select HUD **Entry Date:** change if necessary
- Click **Save & Continue**
- Enter data **MOSBE Profile – Program UDEs** (bottom of page).
  - **Note: your program may have a different assessment to complete**
- Click **Save** (if you have additional assessments to complete)
  - Click **Save & Exit** (if no additional assessments to complete)

Have additional assessment(s) to complete? After completing MOSBE Profile – All UDEs:



- **Select an Assessment:** click on the assessment in order to enter data
- Enter data in applicable fields
- Click **Save** (if another assessment needs to be completed). Repeat this process until all applicable assessments are completed.
- Click **Save & Exit** when done. This will return you to the client's **Profile Summary** page

Workflow: creating a program entry for a Household ➔

The workflow for creating a household program entry is the same except:

- Click **Add Entry/Exit**
- Select members to include in the entry
- Continue with same workflow as single client

Disabilities, Income & Benefits

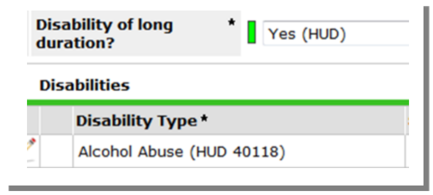
Located on the All UDEs Assessment are three sub-assessments:

- **Disabilities** | • **Monthly Income** | • **Non-Cash Benefits**

Workflow for entering Disabilities data →

Disability of long duration?

- Answered **No?** Skip **Disabilities**
- Answered **Yes?** Click **Add**
  - **Disability Type:** enter best match
  - **Start Date:** change if necessary
- All other fields are optional
- Click **Save and Add Another** (if another disability) or **Save** (if done)



Workflow for entering Monthly Income data →

Received income past 30 days?

- Answered **No?** Skip **Monthly Income**
- Answered **Yes?** Click **Add**
  - **Last 30 day income:** enter amount
  - **Source of cash benefits:** select best match
  - **Start Date:** change if necessary
  - All other fields are optional
- Click **Save and Add Another** (if another source) or **Save** (if done)

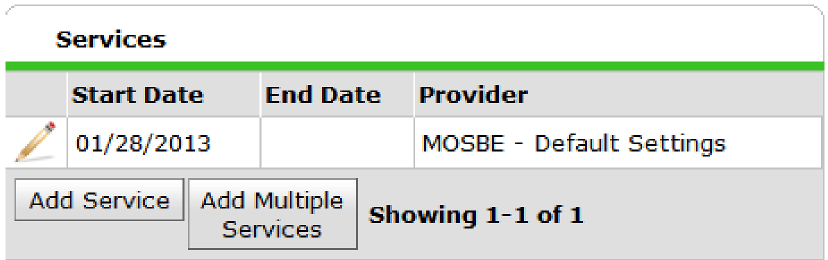
Workflow for entering Non-Cash Benefits data →

Received non-cash benefits in past 30 days?

- Answered **No?** Skip Non-Cash Benefits
- Answered **Yes?** Click **Add**
  - **Non-cash benefit amount:** optional to enter dollar amount
  - **Non-cash benefit source:** select best match
  - **Start Date:** change if necessary
  - All other fields are optional
- Click **Save and Add Another** (if another benefit) or **Save** (if done)

Service Transactions

Locate the Services box on the client's Profile Summary page:



- Click **Add Multiple Services**
- Provider: select correct program
- **Start/End Date:** change if necessary
- **Service:** select from drop down menu
- **Status of Need:** select best match
- **Need to add another service?** Click **Add Another**
- **Finished added services?** Click **Save**

Service for household?
Select member(s) to include in transaction (top of page) before entering any other data

Optional: Funding Sources

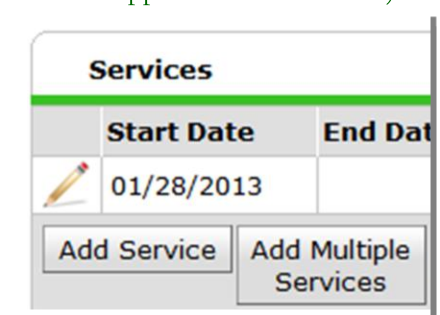
Want to track financial information (funding source, dollar amount of the service)?

- Click **Add Funding Source**
- **Source:** select fund
- **Amount:** enter $ amount
- **Add another source?** Click **Save and Add Another**
- **Done?** Click **Save**

Optional: Adding Notes, Follow-ups

Want to add a note and/a follow-up (a reminder of next appointment with client)**?**

- Click of transaction to update
- **Service Notes:** copy or type note
- **Projected Followup Date:** enter date
- Click Save **& Exit**



After follow-up is made, enter:

- **Follow Up Made:** select **Yes** or **No**
- **Completed Follow Up Date:** enter date you met with client
- Click Save **& Exit**

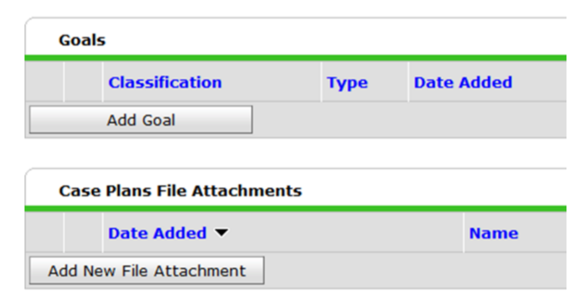
Case Plans

Click the Case Plans tab on the client Profile Summary (top of screen):

Goal for household? **Select member(s) to include (top of page) before entering any other data**

Goals

- Click **Add Goal**
- Enter data in * fields
- **Classification:** select best match from menu
- **Type:** select best match
- **Overall Status:** select **In Progress** or select **Closed** (if the goal achieved or abandoned)



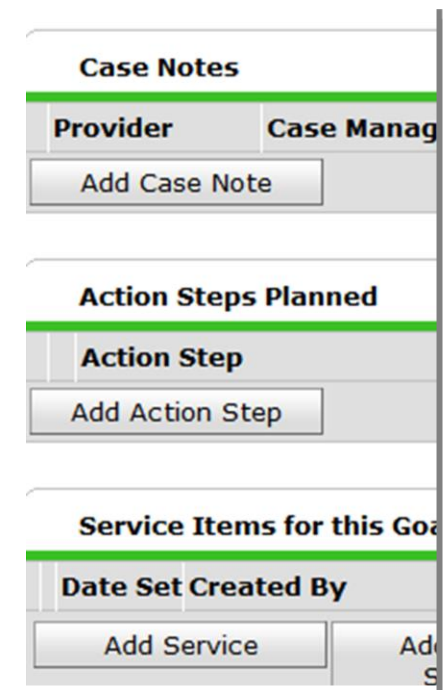
Optional: completing the Follow Up section
Complete the Follow Up section if you wish to be reminded of any commitments made
Click **Add Goal**

Optional features appear: Case Notes, Action Steps, Service Items

Add File Attachments
- Click **Add New File …**
- Click **Browse**
- Locate document
- Click **Open**
-Click **Upload**

Case Notes

- Click **Add Case Note**
- Enter data in * fields
- **Case Manager:** select **Case Manager**
- **Note:** copy or type note
- Click **Save Case Note**
- Select to read a note



Actions Steps

If you wish to enter actions items associated with the goal:

- Click **Add Action Step**
- Enter data in * fields
- **Action Step:** detail action item
- Click **Save Action Item**

Service Items

You can enter service transaction(s) associated with this goal

- Click **Add Service**
- Enter service transaction. Go to page 9 for details on how to enter a service transaction.

- Click **Save & Exit**

Updating Client Data

The workflow described so far details how to enter new clients in HMIS. Once you have entered clients as described in the previous pages, you will need to return on a regular basis to update the client's data. This will include:

- Adding Service Transactions
- Updating Disabilities, Income & Benefits
- Adding Interim Matrix (if using the Matrix)
- Entering Interim Report data (if using Interim & Follow Up Reports)
- Updating Goals and Case Plans
- Creating a Program Exit (when client leaves your progam)

Workflow for ➔ updating client's data begins on page 13 (next page)

Updating Service Transactions

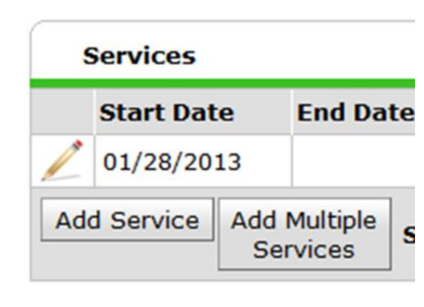
The previous section detailed the workflow for entering new clients in HMIS. This next section details the workflow for clients already in HMIS.

How do I update a client's HMIS data? Start with **Client Search.** Locating the client takes you to their **Profile Summary.** From Profile Summary you will be able to:

- Enter new **Service Transactions**
- Enter an **Interim Report**
- Create a **Program Exit**
- Update **Assessments**
- Update **Goals and Case Plans**
- Enter a **Follow Up Report**

Enter Service Transactions ➔

- Click **Add Multiple Services**
- Provider: select correct program
- **Client in Household?** Select member(s) to include in transaction
- **Start/End Date:** change if necessary
- **Service:** select from drop down menu
- **Status of Need:** select best match
- **Need to add another service?** Click **Add Another**
- **Finished added services?** Click **Save**



Optional: Funding Sources

Want to track financial information (funding source, dollar amount)?

- Click **Add Funding Source**
- **Source:** select fund
- **Amount:** enter $ amount
- **Add another source?** Click **Save and Add Another**
- **Done?** Click **Save**

Optional: Adding Notes, Follow-ups

Want to add a note and/a follow-up (a reminder of next appointment with client)**?**

- Click of transaction to update
- **Service Notes:** copy or type note
- **Projected Followup Date:** enter date
- Click Save **& Exit**

After follow-up is made, enter:

- **Follow Up Made:** select **Yes** or **No**
- **Completed Follow Up Date:** enter date you met with client
- Click Save **& Exit**

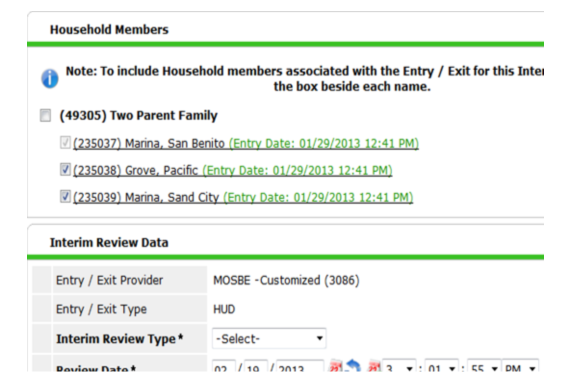
Interim Review

Interim Reviews are used after a client has entered or enrolled in a program but before the client is exited. An interim review allows an agency to capture client data 'as of' a specific date.

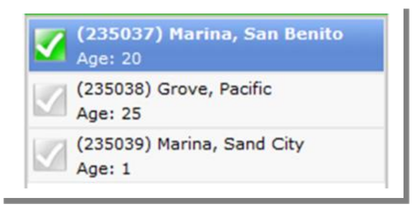
From the Client Profile Summary page:

- Locate the **Entry/Exits** dashlet
- Click to left of **Entry Date**
- **Edit Entry Data** box appears **(leave data as it appears)**
- Click **Save & Continue. Entry/Exit Data** box appears
- Click in the **Interims** column. Click **Add Interim Review**

Client in household? Members automatically selected if members were selected for program entry



- **Interim/Review Type:** select best match
- **Review Date:** change if needed
- Click **Save & Continue**
- **Interim Review Assessment** will display
- Enter data as needed
- Click **Save** when done



- Client's checkmark turns green if required data fields answered
- **Client in household?** Click next client
- Repeat above process until data entered for all members

- **All data entered?** Click **Exit**

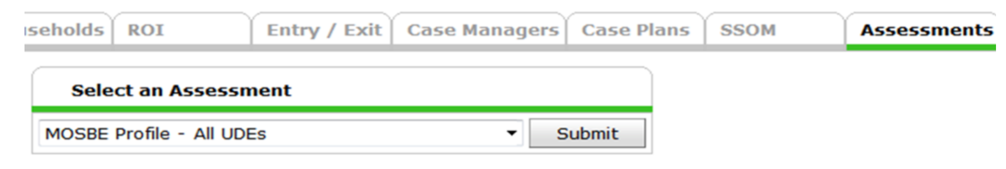
Updating Assessments

Do not update client data in Program Entry.

The exception: If data in Entry is incorrect, make change in Program Entry

A client's data may change after Program Entry AND before Program Exit. Example: the client's current mailing address may have changed.

To update client data in Assessments:



Workflow for single clients ➔

- Click **Assessments** (menu bar, top page)
- Default is **MOSBE Profile-All UDEs**
- **Need to select another assessment?** Select the assessment from the **Select an Assessment** drop down menu
- Click **Submit**
- **Update data fields as needed**
- Click **Save** when done

For clients in a household:

Workflow for clients in a household ➔

- Follow the workflow (above) for the client whose file you are currently in
- Select next member from **Switch to Another Household Member** drop-down menu (top right of screen)
- Click **Submit**
- Follow workflow as described in **Workflow for single clients**
- Click **Save** when done
- Repeat the above workflow until all members have their data updated

Updating the Disabilities, Income & Benefits sub-Assessments

A client's disability, income or benefits may change while enrolled in your program. These changes should be recorded in HMIS in order to accurately track a client's ability to be more self-sufficient.

Workflow for updating in Assessments ➔

- Click **Assessments** tab
- **MOSBE Profile – Program UDEs** should display. If not, select from **Select an Assessment**

Disabilities, Monthly Income and Benefits can be updated in Assessments. You also can update when entering an Interim Review and a Program Exit.

Updating Disabilities

Client no longer living with a disability?

- Click to left of disability
- **End Date:** enter data

Client has no new disability?

- Click **Save**
- **Disability of long duration?** Change answer to **No**

Client has new disability?

- Click **Save and Add Another**
- Enter new disability data
- Click **Save**
- **Disability of long duration?** Answer **Yes**

Updating Monthly Income

Client no longer has an income source?

- Click to left of income amount
- **End Date:** enter data

Client has no new income?

- Click **Save**
- **Received income past 30 days?** Change answer to **No**

Client has new income source?

- Click **Save and Add Another**
- Enter new income data
- Click **Save**
- **Received income past 30 days?** Answer **Yes**

Updating Non-Cash Benefits

Client no longer has benefit source?

- Click to left of benefit source
- **End Date:** enter data

Client has no new benefit?

- Click **Save**
- **Received non-cash …?** Change answer to **No**

Client has new benefit source?

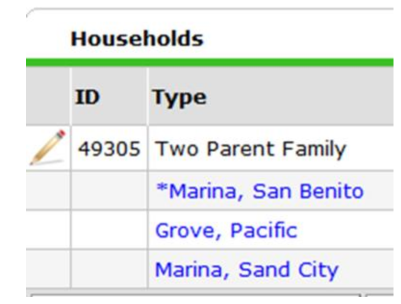
- Click **Save and Add Another**
- Enter new benefit data
- Click **Save**
- **Received non-cash …?** Answer **Yes**

Updating existing Household

The household may change after program entry … a household member leaves or a new member joins the existing household.

To start the updating process:

- Go the head of household's **Client Profile Summary**
- Scroll down to **Households** dashlet
- Click to left of **ID**



Removing a member

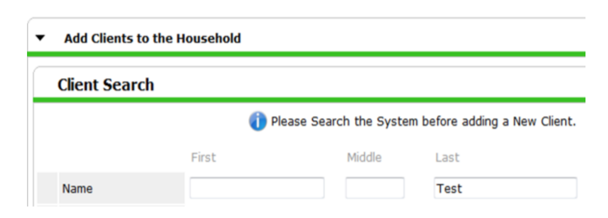
Workflow for removing a member →

- Click to left of member's name
- **Date client left household:** enter date client left (or the date you became aware of the change)
- Click **Save**
- Page refreshes. Member deleted no longer visible in household
- **Household type:** may have to update
- **If update household type:** click **Save & Exit**

Adding member to existing household

Workflow for adding a new member →

- Enter new client in HMIS and complete **MOSBE Profile - Program UDEs**
- Write down new client's HMIS number
- Go the head of household's **Client Profile Summary**
- Scroll down to **Households** dashlet
- Click to left of **ID**
- Click **Add/Delete Household Members**
- Click ‣ **Add Clients to the Household**
- **Client Search** appears
- **Client ID:** enter HMIS # of new client
- Click **Submit**
- Client's name and ID will appear. Click **Continue**



- Update **Household Members** fields to reflect new household
- For example: enter or update data in **Head of Household** and **Relationship to Head of Household**
- **Household Type:** may need to update
- Click **Save & Exit**

Updating Case Plans

As the client progresses in your program it may be necessary to:

- **Close an existing goal**
- **Enter a new goal**
- **Add a case note or add a file attachment**

Click the Case Plans tab

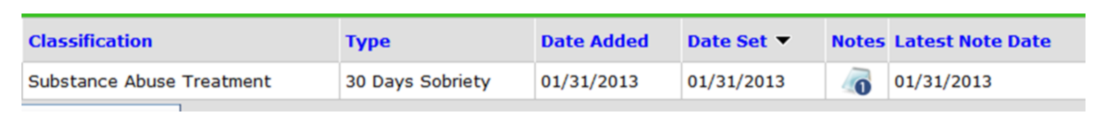
To close a goal:

- Click to left of **Classification**
- **Overall Status:** select best match
- **If Closed, Outcome:** select best match (enter data only if selected Closed for Overall Status
- **Date** (optional)**:** enter date goal was closed
- **If Partially Complete …** (optional)**:** select best match
- Click **Save & Exit**

To enter one or more new goals:

- Click **Add Goal**
- Follow workflow as described in [Case Plans](#) (page 11)

To enter case note to an existing goal:



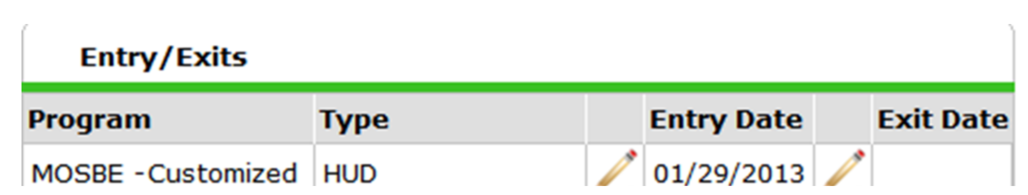
- Click **Notes**
- Click **Add Case Note**
- **Provider:** select correct provider
- **Case Manger:** select **Case Manager**
- **Note:** enter case note
- **Note Date:** update if needed
- Click **Save Case Note**
- Click **Cancel** to exit pop-up window

To add a file attachment:

- Click in **Goals** box (right side of screen) **OR**
- Click **Add New File Attachment** in **Case Plans File Attachments** box
- Follow prompts to find attachment on your computer
- Click **Upload**. File will appear

Program Exit

Create a Program Exit when the client leaves your program. From the Client Profile Summary, click the (left of **Exit Date**):



- **Client in Household? Select members**

Workflow for Single Clients →

- **Exit Date:** change if necessary
- **Reason for leaving:** select best match
- **Destination:** select best match
- **Notes** (optional)
- **Click Save & Continue** (page will refresh)
- **MOSBE Profile – Program UDEs** will appear: update as needed
- **Optional:** review and update other Assessments

- **Client single?** Click **Save & Exit**
- **Client in household?** Click **Save**

Workflow for Households →

Look to left. See Household Members

- Saved client has green checkmark
- Click name of client immediately below client with green checkmark
- Repeat above process until all members have green checkmark
- Click **Save & Exit**

SSOM (Matrix)

The Matrix is a tool to measure a client's self-sufficiency and is used to communicate to funders and interested parties the effectiveness of your Agency in meeting the needs of your clients.

Matrix workflow →

Entering a Matrix score for a client:

- Click **SSOM** (menu bar)
- Click **Add New Point …**
- **Provider:** select
- **Date:** defaults to today
- **Point of Measurement:** select one of the following:

(3086) MOSBE -Customized

Point of Measurement
Interim
Initial
Add New Point of Measurement · Show Summary

Difference between Initial, Interim, Final & Follow up →

Initial: the client's first Matrix in your program. A program can only enter one (1) Initial assessment for a client.

Interim: client has Initial Matrix and is still enrolled in your program. There is no limit to the number of Interims a client can have.

Final: client has just received a program exit or is about to exit. A program can only enter one (1) Final assessment for a client.

Follow Up: client has exited your program for some time. There is no limit to the number of Follow Ups a client can have.

Up to 19 domains (example: Shelter/Housing, Employment, etc) are displayed:

- **Not all 19 domains visible?** Your agency has requested that only certain domains be visible
- Answer the domains that pertain to your client
- **Note: only those domains answered in the Initial Matrix will be answerable in Interim, Final and Follow Up**

Point of Measurement	Total	Average
Interim	16/20	4.00
Interim	19/30	3.17
Initial	12/30	2.00
Add New Point of Measurement · Show Summary	Showing 1-3 of 3	

- Click **Update** (to see the average score without saving the Matrix) **OR**
- Click **Save & Exit** (to return to Matrix main page)

Eligibility

Use the Eligibility Module to see if a client may be eligible to receive one or more benefits. If eligible, the module details how the client can apply for the benefit.

Prior to conducting an Eligibility search →

1. **Client in household?** Decide if search for client, or if search for household
   - **Client only?** Do not select any household members
   - **Client & household?** Select the household members to include
2. **Review Household Income. Gross Monthly Income not accurate?**
   - Click **View Individual Income** (client's **Monthly Income** appears)
   - Click to update amount or add end date to existing income source
   - Click **Add** to add a new income source. Click **Save & Exit** when done

The Eligibility Search

- Click **Add All Eligibility Terms** (in **Eligibility Service Code Quick List**)
- May take a minute to complete the search. When completed results appear in:

Eligibility Service Search Results

	Service Term	Service Code	Eligible	Potential	Ineligible
	Food Stamps/SNAP	NL-6000.2000	1/1	0/1	0/1
	Food Pantries	BD-1800.2000	0/1	1/1	0/1

Benefit listed as Potential?

- Click in the **Potential** column
- Click **Answer Additional Questions for Checked Providers**
- Answer questions
- Click **Save & Exit**
- Click **Exit**
- **Client eligible? Workflow described in previous section**

The client's status for each listed benefit will display:

- **Eligible:** client meets the eligibility requirements for the benefit. **Note:** up to 5 benefits will appear. Client eligible for more than 5 benefits? Click **Next**
- **Potential:** additional questions need to be answered to determine eligibility
- **Ineligible:** client does not meet the eligibility requirements for the benefit

Client eligible?

- Click (left of benefit). Benefit appears in **Selected Eligibility Service Terms**
- Click **Continue**. Page refreshes to show Search Results:

Click on Provider name for application and contact information →

Provider	Type	Phone	Location
Social Security Administration/Salinas	Level 3	(831) 757-8250	Salinas, CA 93901

- **Select Provider from Location in your county**
- Pop up window appears with **Contact Information** and details on how to apply
- Able to print page and give to client
- Click **Save Needs Only**. This creates a **Service Transaction**. Transaction can be closed later when client receives benefit.

Contact Information

Provider Telephone Numbers:

Salinas:	(831) 757-8250 (Primary)
Fax:	831-443-8799
Main number:	1-800-772-1213

Provider Contacts:

Hours of M-F 9am-4pm (office hours); M-

Skan Point

Skan Point allows for the quick entry of service transactions for clients or for entire households with the swipe of a card. Skan Point requires the use of scan cards and a scan card reader.

Assign card to a client

Assign card to client workflow ➔

- Go to client's **Profile Summary**
- Click **Client Profile** tab (top of screen)
- Click in **Client ID**
- Place cursor in **Alternate Client ID** field
- Swipe card, or manually enter card number
- Click **Save**

Scan single service

Scan single service for one or more clients ➔

- Click **Skan Point** (left side of screen)
- **Provider:** select program
- **Service:** select from drop-down menu
- **Start/End Date:** defaults to current date and time
- Optional**: Service Notes**, **Funding Sources**
- Click **Start Skan**. Page refreshes to **Skan ID Cards**
- Swipe card (or manually enter card number). Repeat until all clients scanned
- Click **Exit** when all clients scanned

Want to add members?
As each client scanned, household screen appears. To add members to servive, click member(s) to add. Click **Save**

Scan multiple services

Scan multiple services for one or more clients ➔

- Click **Skan Point** (left side of screen)
- Click **Multiple Service** tab (top of screen)
- **Provider:** select program
- **Service:** select from drop down menu
- **Status of Need:** closed
- Click **Add Another**
- Repeat (if necessary) until all services added
- Click Start Skan
- Swipe cards and add household members (if applicable) as described in **Scan Single Service**

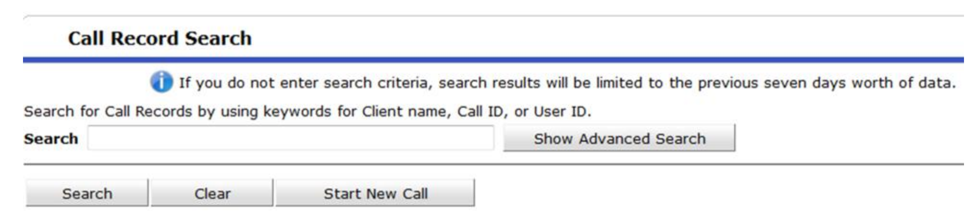
Call Point

Create a call record, capture assessment information, issue referrals, record the time of each call, and flag calls for follow-up. Each call is captured as a unique record, storing information without creating a client in Client Point. Once you establish the caller as a client (that is, provide services), you have the option to associate a call record with a new or existing client.

Want to use Call Point?
Call Point must be activated for your program. Contact your Agency Administrator or CTA representative for assistance.

.Assessing Call Point

- Access your HMIS account
- Click **Call Point** tab (left side of screen)



Click **Start New Call**

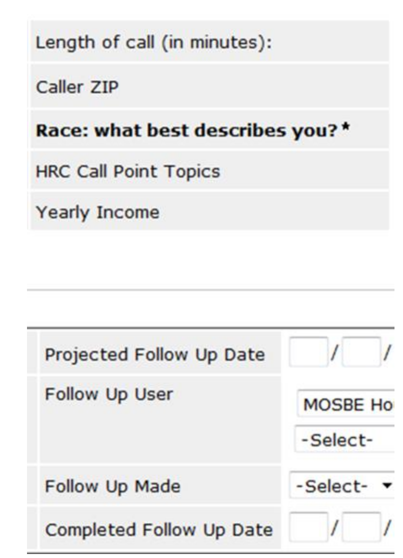
Start a new call →

Call Record Information screen appears

- **Current Call Record:** caller's name/alias, number, notes (all fields are optional)

Call Point Profile

- **Length of call**: enter minutes
- **Call Zip**: enter zip, then click **Apply ZIP Code Information**
- **Race, Call Point Topics, Yearly Income:** select best match for each



Need to do a follow-up?

- **Projected date:** enter date
- **Follow Up User:** select self or other case manager

Follow-up completed?

- **Follow Up Made:** Yes or No
- **Completed:** if Yes, enter date

Add Referral feature

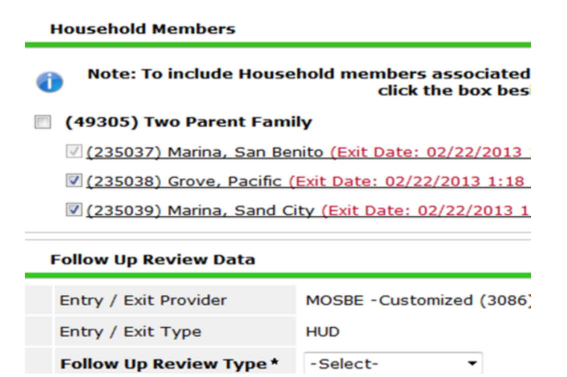
This feature allows callers to be referred to other programs for assistance. In order to effectively use this feature, a referral system would need to be established between programs entering data in HMIS.

Follow up Review

Follow Up Reviews are used after a client has exited a program. Follow Up Review are used if your program needs to report on how well a client is doing after leaving your program.

- Go to client's **Profile Summary** and located **Entry/Exits** dashle
- Click to left of **Exit Date**
- Click **Save & Continue**
- Click in the **Follow Ups** column. Click **Add Follow Up Review**

Client in household? Members automatically selected if members were selected for program entry



- **Follow Up Review Type:** select best match
- **Review Date:** change if needed
- Click **Save & Continue**
- **Follow Up Review Assessment** will display
- Enter data as needed
- Click **Save** when done

- Client's checkmark turns green if required data fields answered
- **Client in household?** Click next client
- Repeat above process until data entered for all members

- **All data entered?** Click **Exit**