Version 5.14.2 Overview

Counts Reports
'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.

Home>Main Dashboard

The Dashboard appears when you log on to HMIS. Up to 4 **Counts Reports** will load. Which reports are displayed 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

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). For 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.

Icons

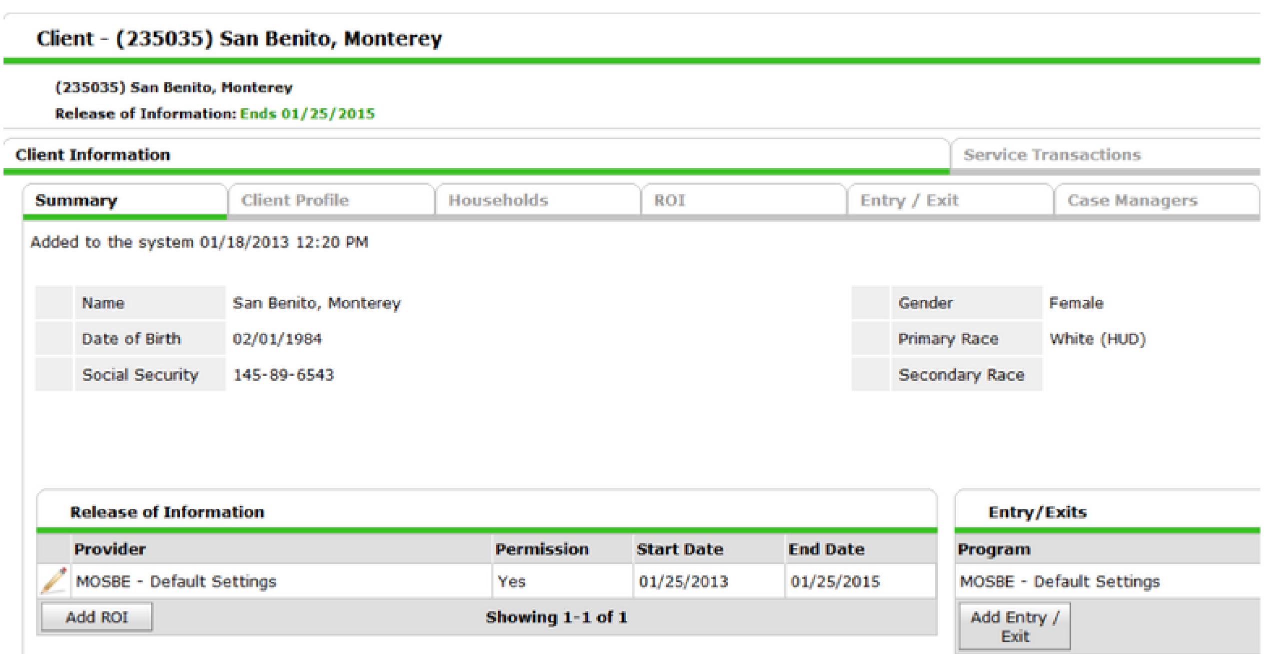
Print with signature lines	
Add to Favorites	
Attach photos and documents	

Using the Client Profile Summary

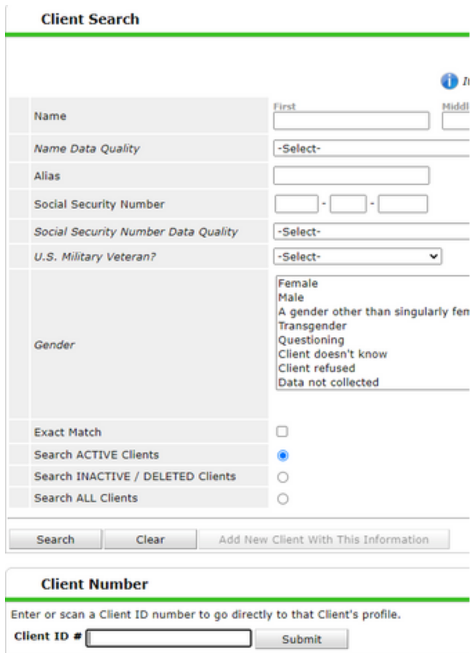
The Summary Profile Summary is configured so a client's entire HMIS file can be accessed from this page. This means less time navigating back and forth between pages.

Client Summary not configured with dashlets you need? Contact your Agency Administrator or HMIS Program Coordinator to learn how to update your Summary.

Example of a Client Profile Summary (partial screen shot)



Client Search


Client Search

Name	First / Middl
Name Data Quality	-Select-
Alias	
Social Security Number	- -
Social Security Number Data Quality	-Select-
U.S. Military Veteran?	-Select-
Gender	Female Male A gender other than singularly fem Transgender Questioning Client doesn't know Client refused Data not collected
Exact Match	
Search ACTIVE Clients	
Search INACTIVE / DELETED Clients	
Search ALL Clients	

Search | Clear | Add New Client With This Information

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # | Submit

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**
- A pop-up window will appear stating **Create Client?**
- Click **OK**
- Opens to the **Client Profile Summary** page

If there is a match:

Search by name or SSN: Potential matches will appear at the bottom of the screen.

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

Search by client ID#: You will be taken to the **Client Summary** page.

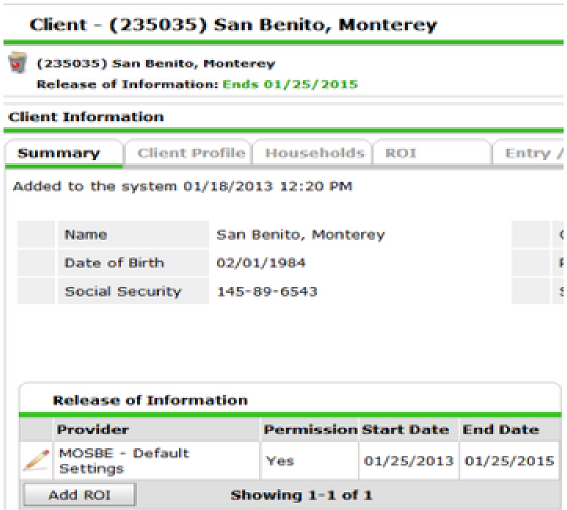
What if the client is new to my program, but is the client already in HMIS?
Even if the client was entered into HMIS by another program:

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

Client Profile Summary

Profile Summary

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

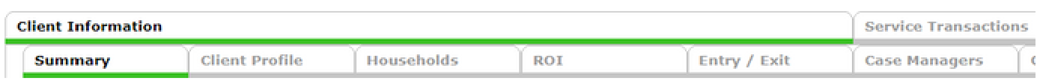


Your **Client Profile Summary** has likely been configured to include the following:

- **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 the screen.

Workflow Menu options
Below the client's ID and name are a series of workflow tabs:

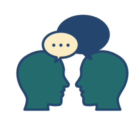


Client Information: The page you're currently on.
Service Transactions: Click to add a service transaction or create a referral.

The next series of tabs (**Summary**, **Client Profile**, **Households**, etc) displays the correct workflow order for entering the client's data. Click on a tab to enter the 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 into 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 for clients entered into 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** fields will populate the data 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**.

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**.

Households

- Leave this dashlet empty.

How do I ...?

Attach a photo

- Click **Client Profile**
- Click **Change**
- Click **Browse**
- Locate photo
- Click **Upload**

Attach a 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/Exit dashlet:

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

MOSBE Profile –Program UDEs

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

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

What do the checkmarks mean?

All required data fields are complete and current.
When data is incomplete, meaning one or more of the HUD Types is missing an answer, a warning icon will display in red.

Services

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

Profile Summary: Household

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

Workflow for creating new Households

- Search for and add the head of household. Write down their HMIS client ID.
- 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 client ID.
- 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 client ID of the client you want to add.
- Repeat the above process until all members are added.
- Click **Continue**.
- **Head of Household:** Answer **Yes** for the head; answer **No** for all other members.
- **Relationship to Head:** Select the best match from the 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/Exit dashlet:

- Click (left of date)
- Click **Save and Continue**.
- Scroll down to bottom of the 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)

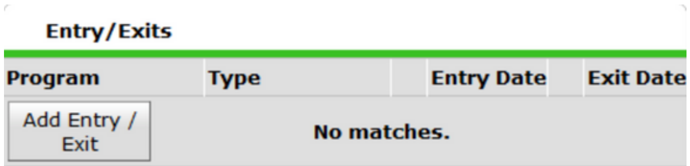
- Click **Add Entry/Exit**.
- Select household. Complete ***** data fields.
- Click **Save Continue**.
- **MOSBE Profile** should already be completed for all members. Optional to complete other displayed assessments.
- Click **Save & Exit** when all data entered for the client.

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

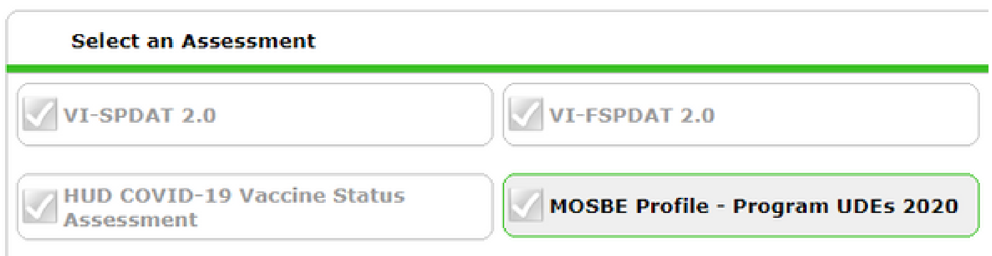
Locate the Entry/Exits box on the client's Profile Summary page:



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 the **MOSBE Profile – All UDEs:**



- **Select an Assessment:** Click on the assessment in order to enter the data.
- Enter the data in the 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 for 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

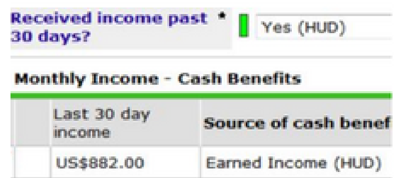
Located on the All UDEs Assessment are three sub-assessments:

- Disabilities
- Monthly Income
- Non-Cash Benefits

Workflow for entering **Disabilities**

Disability of long duration?

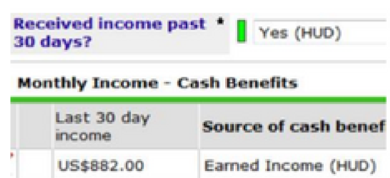
- Answered **No?** Skip **Disabilities**.
- Answered **Yes?** Click **Add**.
- **Disability Type:** Enter the best match.
- **Start Date:** Change if necessary.
- All other fields are optional.
- Click **Save and Add Another** (if another disability) or **Save** (if done).



Workflow for entering **Monthly Income**

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).



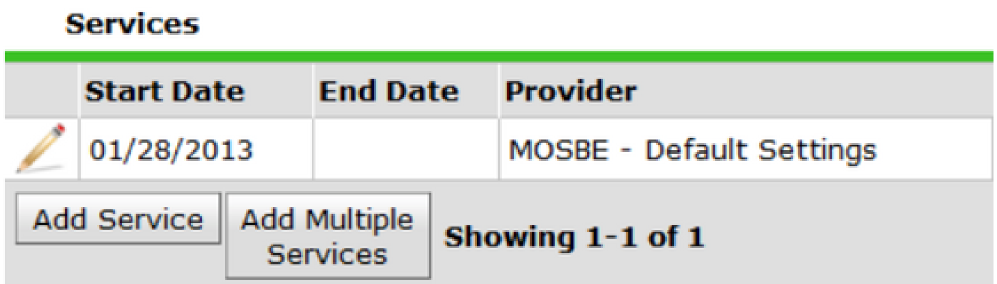
Workflow for entering **Non-Cash Benefits**

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:



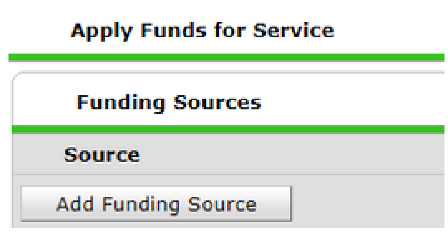
Service for household?
Select member(s) to include in the transaction before entering any other data.

- Click **Add Service/Multiple Services**.
- Provider: Select the correct program.
- **Start/End Date:** Change if necessary.
- **Service:** Select from the drop-down menu.
- **Status of Need:** Select the 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 of the service)?

- Click **Add Funding Source**.
- **Source:** Select fund.
- **Amount:** Enter $ amount.
- **Add another source?** Click **Save and Add Another**.
- **Done?** Click **Save**.



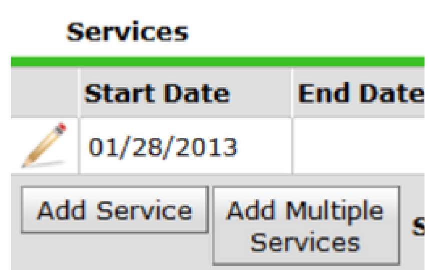
Optional: Adding Notes, Follow-ups

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

- Click the of transaction to make an update.
- **Service Notes:** Copy or type not.
- **Projected Follow up Date:** Enter the 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

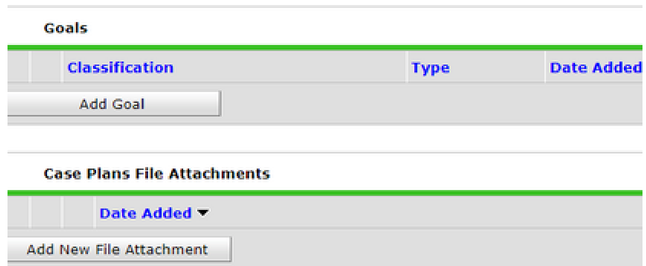
Click the Case Plans tab on the client Profile Summary (top of screen):

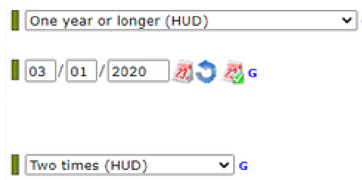
> **Household Goals?**
>
> Select member(s) to include before entering any other data.

Goals

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

- Users can also use the **G** found throughout the assessments as a shortcut.





Optional: Completing the Follow Up section

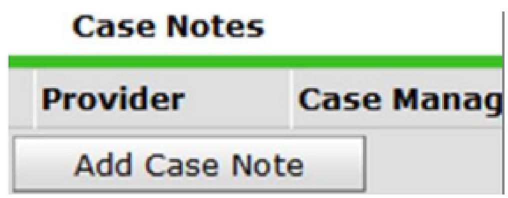
Complete the Follow Up section if you wish to be reminded of any commitments made. Click **Add Goal.**

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

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

Case Notes

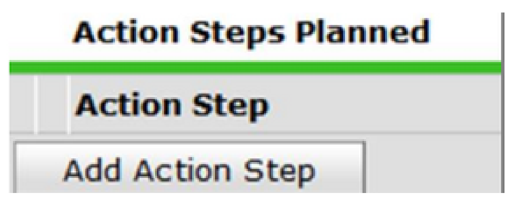
- Click **Add Case Note**.
- Enter data in * fields.
- **Case Manager:** Select **Case Manager**.
- **Note:** Copy or type note.
- Click **Save Case Note**.
- Select the 🔍 to read a note.



Actions Steps

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

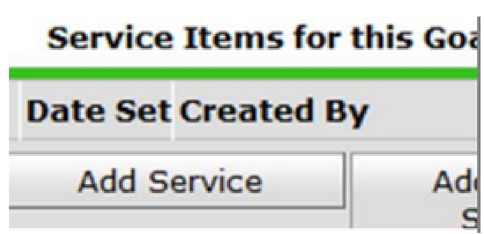
- Click **Add Action Step**.
- Enter data in * fields.
- **Action Step:** Detail action item.
- Click **Save Action Item**.



Service Items

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

- Click **Add Service**.
- Enter the 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:

Workflow for updating client's data begins on the next page.

- **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 program).**

Updating Service Transactions

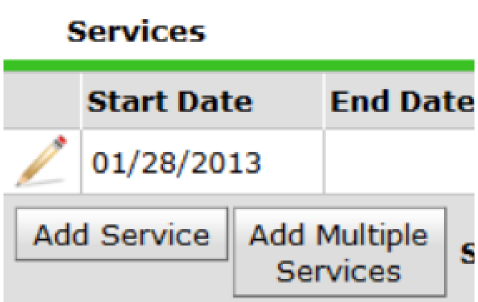
The previous section detailed the workflow for entering new clients in HMIS. This next section details the workflow for clients already in HMIS.

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**.

Workflow for entering **Service Transactions**

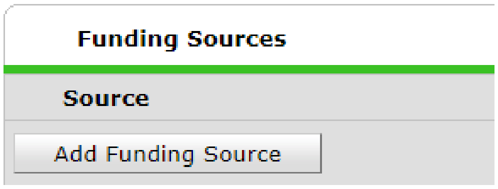
- Click **Add Multiple Services**.
- Provider: Select the correct program.
- **Client in Household?** Select the member(s) to include in the transaction.
- **Start/End Date:** Change if necessary.
- **Service:** Select from the drop-down menu.
- **Status of Need:** Select best match.
- **Need to add 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 the pencil left of the transaction to update.
- **Service Notes:** Copy or type a note.
- **Projected Follow-Up Date:** Enter the date.
- Click **Save & Exit**.

After follow-up is made, enter:

- **Follow-Up Made:** Select **Yes** or **No**.
- **Completed Follow-Up Date:** Enter the date you met with the 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.

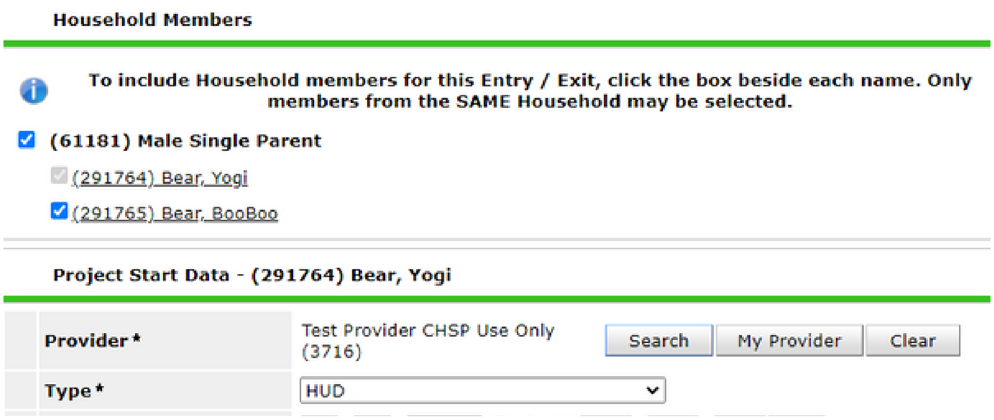
From the Client Profile Summary page:

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

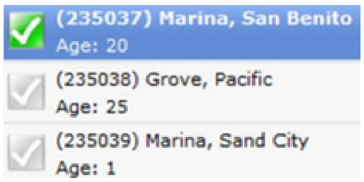
Project Start Date		Exit Date	Interims	Follow Ups	Client Count	
09/30/2021					5	
07/08/2021			1		5	1

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.



- The client's checkmark will turn green if required data fields are answered.
- **Client in a household?** Click the next client.
- Repeat the above process until data is entered for all members.
- **All data entered?** Click **Exit**.



Updating the Disabilities, Income & Benefits sub-Assessments

Workflow for updating 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.

- Click the **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 the ✏ 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 the ✏ 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 the ✏ to left of benefit source.
- **End Date:** Enter data.

Client no longer has benefit source?

- 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 Households

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

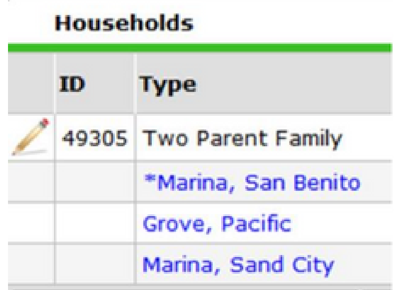
To start the updating process:

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

Workflow for removing a member

Removing a member

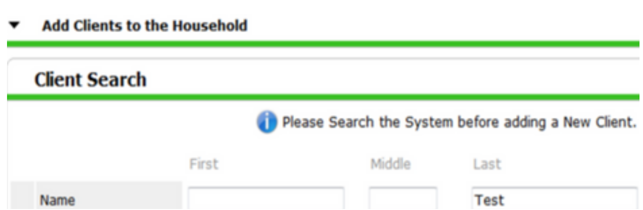
- Click the to left of the member's name.
- **Date client left household:** Enter date client left (or the date you became aware of the change).
- Click **Save**.
- The page will refresh and the deleted member will no longer be visible in the household.
- **Household type:** May have to update.
- **If updating household type:** Click **Save & Exit**.



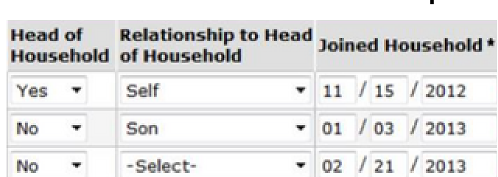
Workflow for adding a new member

Adding member to existing household

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



- Update **Household Members** fields to reflect the 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

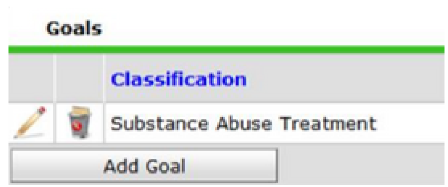
As the client progresses in your program it may be necessary to:

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



To enter one or more new goals:

- Click **Add Goal**.
- Follow workflow as described in **Case Plans**.

To enter case note to an existing goal:

Classification	Type	Date Added	Date Set	Notes	Latest Note Date
Substance Abuse Treatment	30 Days Sobriety	01/31/2013	01/31/2013		01/31/2013

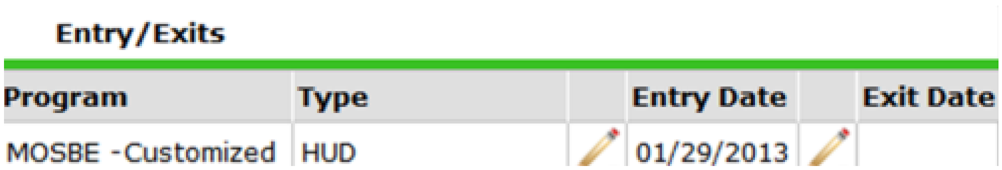
- Click **Notes**.
- Click **Add Case Note**.
- **Provider:** Select the correct provider.
- **Case Manager:** Select **Case Manager**.
- **Note:** Enter case note.
- **Note Date:** Update if needed.
- Click **Save Case Note**.
- Click **Cancel** to exit pop-up window.

To add a file attachment:

- Click in **Goals** box (right side of the screen) **OR**
- Click **Add New File Attachment** in **Case Plans File Attachments** box.
- Follow prompts to find the 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 (to the left of **Exit Date**):



- **Client in Household? Select members**

Workflow for Single Clients

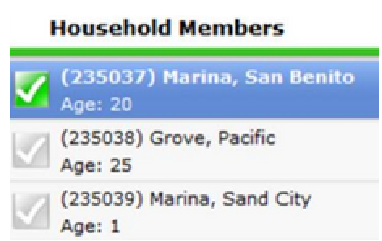
- **Exit Date:** Change if necessary.
- **Reason for leaving:** Select the best match.
- **Destination:** Select the best match.
- **Notes** (optional).
- **Click Save & Continue** (the page will refresh).
- **MOSBE Profile – Program UDEs** will appear: Update as needed.
- **Optional:** Review and update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

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

Workflow for Households

Look to left. See Household Members

- Saved clients will have a green checkmark.
- Click the name of the client immediately below the client with a green checkmark.
- Repeat the above process until all members have a green checkmark.
- Click **Save & Exit**.



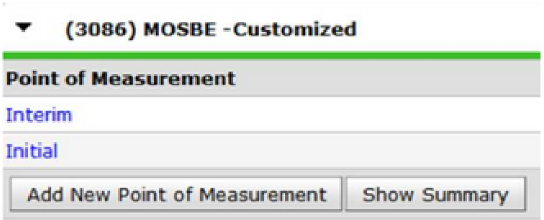
SSOM (Matrix)

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

Differences 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: The 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: The 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: The 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 a household? Decide if the search is for a client, or if the search is for a 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 the ✎ to update the amount or add the end date to the existing income source.
- Click **Add** to add a new income source. Click **Save & Exit** when done.

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 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

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

- **Eligible:** The client meets the eligibility requirements for the benefit. **Note:** Up to 5 benefits will appear. Is the client eligible for more than 5 benefits? Click **Next**.
- **Potential:** Additional questions need to be answered to determine eligibility.
- **Ineligible:** The 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**
- A pop-up window appears with **Contact. Information** and details on how to apply.
- Ability to print the page and give it to the client.
- Click **Save Needs Only**. This creates a **Service Transaction**. Transactions can be closed later when the client receives benefits.

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 on client workflow ➡

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

Scan single service

Scan single service for one or more client ➡

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

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

Scan multiple services

Scan multiple services for one or more client ➡

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

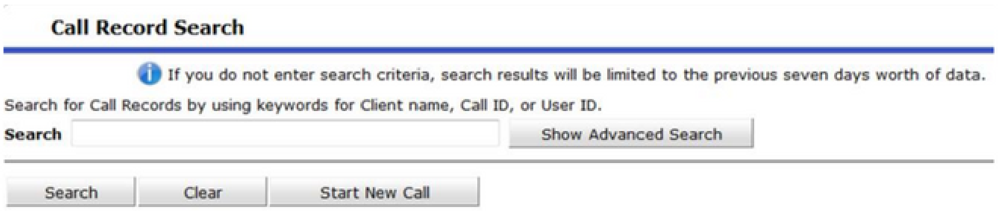
Call Point

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, 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.

Assessing Call Point

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



Start a new call

Click **Start New Call**

Call Record Information screen appears.

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

Call Point Profile

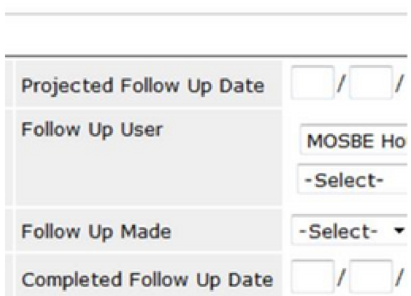
- **Length of call:** Enter minutes.
- **Call Zip:** Enter zip, then click **Apply ZIP Code Information**.
- **Race, Call Point Topics, Yearly Income:** Select best match for each.

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.

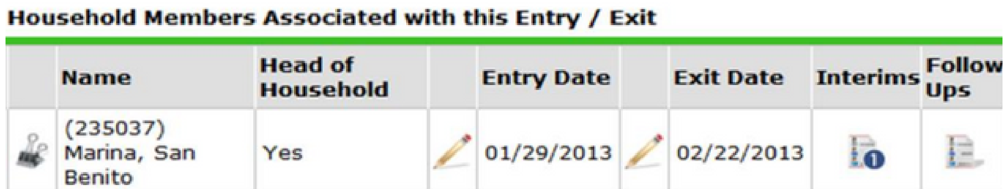


Add Referral feature

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 into HMIS.

Follow-Up Review

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

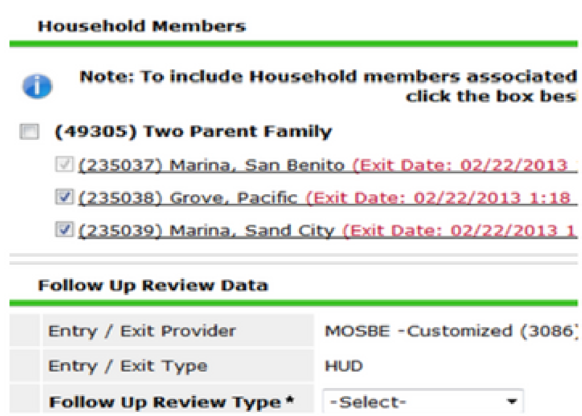

Household Members Associated with this Entry / Exit

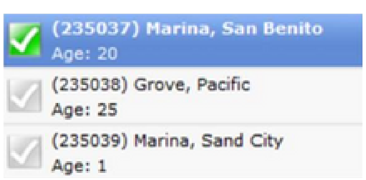
	Name	Head of Household		Entry Date		Exit Date	Interims	Follow Ups
	(235037) Marina, San Benito	Yes		01/29/2013		02/22/2013		

- Go to the client's **Profile Summary** and locate it.
- **Entry/Exits** dashlet.
- Click the to the left of the **Exit Date**.
- Click **Save & Continue**.
- Click the 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 the best match.
- **Review Date:** Change if needed.
- Click **Save & Continue**.
- **Follow-Up Review Assessment** will display.
- Enter data as needed.
- Click **Save** when done.





- The client's checkmark will turn green if the required data fields are answered.
- **Client in a household?** Click next client.
- Repeat the above process until data is entered for all members.
- **All data entered?** Click **Exit**.