

DE-CMIS GUIDANCE: HOW TO ADD ADDITIONAL HOUSEHOLD MEMBERS <u>TO ENTRY</u>

INTRODUCTION

This document's purpose is to provide guidance to Delaware CMIS users on how to enter new household member(s) to an already-existing project entry.

Situations where this is required may include, but are not limited to:

- A household having more members than documented and/or referred by Centralized Intake;
- A client having shared custody of a child where:
 - the child is only staying in a program part-time; or
 - o client takes custody of child while enrolled in a program;
- A client having a new partner; or
- A client giving birth while enrolled in a program.

Following this workflow will avoid having families be pulled into reports as different households rather than one. System-wide, this can eliminate errors where unaccompanied minors are incorrectly enrolled under programs.

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TECHNICAL ASSISTANCE

For further clarification on adding new household members to already-existing project entries, contact Housing Alliance Delaware (HAD) at cmis.support@housingalliancede.org.

METHOD #1: CLIENTPOINT

1. Go to the profile of the Head of Household who is already enrolled in the project. Access their Households tab and check if the "new" household member(s) is in the household.

Client - (1) Test, Justin	Α				Mass Visibility (Jpdate
(1) Test, Justin A Release of Information: None			-Switch to A	nother Househo	ld Member- 🗸	Submit
Client Information		Ý	Service Transact	ions		
Summary Client Profile	louseholds ROI	En En	try / Exit Case	Managers C	ase Plans 🎽 /	ssessmen
	arent Age H	lead of lousehold	Relationship to Head of Household	Joined Household	Previous Associations	Househol Count
 (25550) Male Single Pa Name (1) Test, Justin A 	arent Age H	H ead of Household Yes	Relationship to Head of Household Self	Joined Household	Previous Associations	Househol Count
 (25550) Male Single Pa Name (1) Test, Justin A (108687) Test, Terri 	arent Age 51 Y 28 M	Head of Household Yes No	Relationship to Head of Household Self son	Joined Household 06/03/2021 08/10/2022	Previous Associations 0 Q 2 Q	Househol Count
 (25550) Male Single Pa Name (1) Test, Justin A (108687) Test, Terri (103388) Test, Thomas 	arent Age 51 Y 28 M	Head of Household Yes No	Relationship to Head of Household Self son son	Joined Household 06/03/2021 08/10/2022 08/10/2022	Previous Associations 0 Q 2 Q 3 Q	Househol Count 1 Q 1 Q 1 Q

a. If not, use the "Manage Household" button to add them. Do so by using a Client Search to see if they have a profile in CMIS, and if not, create one now. <u>Consult the</u> <u>ClientPoint Training PowerPoint for more guidance if needed (slides 21-24)</u>.

2. Update the client's Release of Information (ROI) by including the new household member(s).

a. Select the pencil/edit icon to access the ROI.

Client Informa	tion	s	Service Transactions			
Summary	Client Profile Households	ROI	Ent	ry / Exit 🍸 Case	Managers Case P	lans
Release	of Information	Dow	niccion	Start Date	End Data	
Catho	blic Charities	Yes	nission	09/01/2022	09/01/2025	÷.
Add Releas	e of Information	s	howing 1-1	L of 1		

b. Click the "Include Additional Household Members" button.

Release of Informa	ation		×				
Release of Inf	Release of Information - (1) Test, Justin A						
Household Mem	Household Members						
No Household Memb	ers were originally	associated.					
		Include Additional Household Me	mbers				
Release of Infor	mation Data						
Provider*	Catholic Charities	• (45) 🗸					
Release Granted	Yes						

- c. Select the household member(s) who are being added to the project entry.
 - (25550) Male Single Parent
 (1) Test, Justin A
 (108687) Test, Terri
 (103388) Test, Thomas

d. Click the "Continue" button, followed by the "Save Release of Information" button.

3. Go to the client's Entry/Exit tab, where you will use the pencil to access the client's already-existing project entry. Then, click "Save & Continue" to proceed.

(1) Test, Just Release of In	in A formation: <mark>None</mark>			-Switc	h to Another	Household Memb	er- 🗸 Su	bm
ient Inform	ation		S	ervice Trans	actions			
Summary	Client Profile	Households	ROI	Entry	/ Exit	Case Managers	Case Pla	ns
	Reminder: Househ	old members must	be established	d on Househo	lds tab befor	e creating Entry /	Exits	
Entry / Program	Reminder: Househ	old members must	be established	d on Househo Dject Start te	lds tab befor Exit Date	e creating Entry / e Interims ^F	Exits Follow Clien Ups Coun	t

4. At the top of the window, a "Household Members Associated with this Entry / Exit" is visible. Click the "Include Additional Household Members" button at the bottom.

Entry/Exit Data		et 1
Note: If you change the provider se	lected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the p will still be attached to that Assessment record for the Client.	previous Assessmen
Provider* Type*	HUD V Update	
Household Members Associated	J with this Entry / Exit	
Name Hea Image: I	d of Household Project Start Date Project Start Date Interims Follow Reason for Leaving Destination of the Project Start Date P	ation Notes
Entry Assessment		
Household Members	Household Data Sharing	â
(1) Test, Justin A Age: 51 Veteran: Unknown	Client: (1) Test, Justin A Add	d Household Data
	HUD CoC & ESG Entry SO ES SH (2020-2021) - CoC Entry Date: 09/01/2022	: 03:20:56 PM 🔒

5. In the "Edit Project Start Date" window:

- a. Select the household member(s) being added to the project entry.
- b. Change the Project Start Date to match when they joined the project.
- c. Click "Save & Continue".

a.	 (25550) Male Single Pa (1) Test, Justin A (Entr ✓ (108687) Test, Terri (103388) Test, Thomas 	vrent y Date: 09/01/2022 3:20 PM)
	Edit Project Start Data	- (1) Test, Justin A
	Provider	Catholic Charities - Casa San Francisco ES (9)
	Туре	HUD
b.	Project Start Date*	09 / 19 / 2022 🔊 💐 3 💙 : 20 🗸 : 56 🗸 PM 🗸
с.		Save & Continue Cancel

6. The "Household Members Associated with this Entry / Exit" table will have updated (with different Project Start Dates) and the "Household Members" box now lists all associated household members. Use the Household Members box to switch to the newly added household member(s) to complete their entry assessment.

	Ηοι	isehold Members Associat	ed with this Entry / Exit								
		Name	Head of Household		Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
ĥ	ŵ	(1) Test, Justin A	Yes	/	09/01/2022	2	E.	E.			
n	ŵ	(108687) Test, Terri	No	/	09/19/2022	2	E.	E.			
I	nclude	Additional Household Memb	ers			Sho	wing 1-2 of	2			
E	ntry A	ssessment									
ſ	Но	usehold Members	Household Data Shar	ing							â
	(1) Test, Justin A Add Household Data Versens Uklander							old Data			
2	Ueteran: Unknown HUD CoC & ESG Entry SO ES SH (2020-2021) - CoC Entry Date: 09/01/2022 03:20:56 PM Age: 28 Age: 28 Age: 28 Age: 28 Age: 28										

7. Save & Exit once complete.

METHOD #2: SHELTERPOINT

1. Use **ClientPoint** to access the profile of the Head of Household who is already enrolled in the project. Access their Households tab and check if the "new" household member(s) is in the household.

(14) Smith, Will Release of Information: None			-Switch to A	nother Househ	old Member- 🗸	Submit
lient Information		Service	Transactions			
Summary Client Profile Households R	ROI	Entry / E	Exit 🎽 Case Man	agers Case	Plans 🍸 As	sessments
Namo	400	Head of	Relationship to	Joined	Previous	Household
Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Househol Count
Name (14) Smith, Will	Age 40	Head of Household Yes	Relationship to Head of Household Self	Joined Household	Previous Associations	Househole Count
Name (14) Smith, Will (16) Smith, Jaden	Age 40 23	Head of Household Yes No	Relationship to Head of Household Self son	Joined Household 09/21/2022 09/21/2022	Previous Associations	Household Count
Name (14) Smith, Will (16) Smith, Jaden (15) Smith, Willow	Age 40 23 20	Head of Household Yes No No	Relationship to Head of Household Self son daughter	Joined Household 09/21/2022 09/21/2022 09/21/2022 09/21/2022	Previous Associations	Househol Count 1 Q 1 Q 1 Q

a. If not, use the **"Manage Household**" button to add them. Do so by using a Client Search to see if they have a profile in CMIS, and if not, create one now. <u>Consult the</u> ClientPoint Training PowerPoint for more guidance if needed (slides 21-24).

2. Update the client's Release of Information (ROI) by including the new household member(s).

a. Select the pencil/edit icon to access the ROI.

Client Information		Service Tran	sactions		
Summary Client Profile Households	ROI	Entry / Exit	Case Managers (Case Plans 🎽 As	sessments
Release of Information					
Provider	I	Permission	Start Date	End Date	
The Shepherd Place	×	Yes	09/02/2022	09/02/2025	i kan bar an
Add Release of Information		Showing 1-1	of 1		

b. Click the "Include Additional Household Members" button.

elease of Inform	ation	×
Release of Inf	formation - (14) Smit	h, Will 🍰
Household Mem	bers	
10 update Ho	usehold members for this beside eac	Release of Information, click the box :h name.
🗌 (2) Two Parent	Family	
🛛 <u>(14) Smith, Wil</u>	<u>l</u>	
🗹 <u>(16) Smith, Jac</u>	len	
🗹 <u>(15) Smith, Wi</u> l	low	
		Include Additional Household Members
Release of Infor	mation Data	
Provider *	The Shepherd Place (7)	Search My Provider Clear
Release Granted	Yes	

c. Select the household member(s) who are being added to the project entry.

Include Additional Household Members
Household Members
To include additional Household Members, click the box beside ach name. Only Members from ONE Household may be selected at a time.
(2) Two Parent Family
🖾 <u>(14) Smith, Will</u>
(17) Pinkett-Smith, Jada
(16) Smith, Jaden
(15) Smith, Willow

d. Click the "Continue" button, followed by the "Save Release of Information" button.

3. Go to **ShelterPoint** and locate your Head of Household on your project's Unit List. Click on their name.

			1							
-	09/07/2022	House - 2	Room 2 - Family	Bed 001	(14) Smith, Will	02/19/1982	Male	9	No	
-	09/07/2022	House - 2	Room 2 - Family	Bed 002	(16) Smith, Jaden	06/28/1999	Male	9	No	
-	09/07/2022	House - 2	Room 2 - Family	Bed 003	(15) Smith, Willow	07/15/2002	Female	9	No	

4. In the Household Members section of the check-in screen, click the "Check In Additional Family Members" button.

ay Data	Entry / Exit	Release of Information	Service Transactions
Unit Entry Data - (14)	Smith, Will		
Date In*	09 / 07 / 2022 🕂 🥎	🎘 9 💙 : 04 🌱 : 50 🗸 AM 🌱	Midnight Check In
Confirm for Next Day Stay	? No 🗸		
Unit Name / Number	House - 2 / Room 2 - Family	/ Bed 001	Assign Unit
Supplies Given			
Locker number			
Codes/Notes			
Codes/ Notes			
			Change Clear
Apply Funds for Servic	e		
Funding Courses			
Courses			A
Source			Ame
Add Condina Courses			
Add Funding Source			Calculate Total: \$0
Incidents For (14) Smi	ith, Will		Calculate Total: \$0
Incidents For (14) Smi Start Date End Dat	ith, Will e Incident	Incident Code Provider	Calculate Total: \$0 Ban Site Staf
Incidents For (14) Smi Start Date End Dat Add New Incident	ith, Will e Incident	Incident Code Provider No matches.	Calculate Total: \$0
Incidents For (14) Smi Start Date End Dat Add New Incident Household Sharing	ith, Will æ Incident	Incident Code Provider No matches.	<u>Calculate</u> Total: \$0 Ban Site Staf
Incidents For (14) Smi Start Date End Dat Add New Incident Household Sharing	ith, Will ce Incident	Incident Code Provider No matches.	<u>Calculate</u> Total: \$0 Ban Site Staf
Incidents For (14) Smi Start Date End Dat Add New Incident Household Sharing	ith, Will æ Incident	Incident Code Provider No matches.	Calculate Total: \$0 Ban Site Staf
Incidents For (14) Smi Start Date End Dat Add New Incident Household Sharing	ith, Will re Incident	Incident Code Provider No matches.	Calculate Total: \$0
Incidents For (14) Smi Start Date End Dat Add New Incident Household Sharing Household Members Household Members	ith, Will re Incident members associated with this ember. To include additional	Incident Code Provider No matches. No matches. No matches. Click In Add	Calculate Total: \$0 Ban Site Staf Add Household Data
Incidents For (14) Smi Start Date End Dat Add New Incident Household Sharing Household Members Household Members Household Members	ith, Will re Incident members associated with this ember. To include additional	Incident Code Provider No matches. Check In appear checked below. Click I household members, click Check In Add	Calculate Total: \$0
Incidents For (14) Smi Start Date End Dat Add New Incident Household Sharing Household Members Household Members Household m Two Parent Family	ith, Will re Incident members associated with this ember. To include additional	Incident Code Provider No matches. Check In appear checked below. Click I household members, click Check In Add Room 2 - Family	Check In Additional Family Members.
Incidents For (14) Smi Start Date End Dat Add New Incident Household Sharing Household Members Household Members Household Members (14) Smith. Will (12) Pinkett-Smith. Ja	ith, Will re Incident embers associated with this ember. To include additional	Incident Code Provider No matches. Check In appear checked below. Click I household members, click Check In Add Room 2 - Family	Calculate Total: \$0 Ban Site Staf Add Household Data an Unit to change the unit for a tribinal Family Members. Check In Additional Family Members Bed 001 Assign Uni Assign Uni
Incidents For (14) Smi Start Date End Dat Add New Incident Household Sharing Household Members Household Members Household Members (14) Smith. Will (12) Pinkett-Smith. Jaden	ith, Will <u>e</u> Incident embers associated with this ember. To include additional	Incident Code Provider No matches. Check In appear checked below. Click I household members, click Check In Add Room 2 - Family Room 2 - Family	Calculate Total: \$0 Ban Site Staf Add Household Data an Unit to change the unit for a tribinal Family Members. Check In Additional Family Members Bed 001 Assign Uni Bed 002 Assign Uni

5. In the "Check In Additional Household Members" window:

a. Change the "Date In" to the date/time that the client(s) joined the household in the program.

- b. Check off the name(s) of the clients moving in with the household.
- c. Select "Save & Exit".

HECK IN ADDIL	onal Household Members
Unit Entry Da	ita
Date In*	09 / 21 / 2022 🔊 🎘 11 🗸 : 10 🗸 : 56 🗸 AM 🗸
Entry Data	
Provider	(472) The Shepherd Place - Shelter ES
T	HUD
Household M	tembers
Household M	Members ude Household members in this Check In, click the box beside each name. Then assign each member a unit.
Household M To inclu 2) Two Parent I (14) Smith	Members ude Household members in this Check In, click the box beside each name. Then assign each member a unit. Family h, Will (This Client is already checked in)
Household M To inclu 2) Two Parent I (14) Smith (17) Pinke	Aembers ude Household members in this Check In, click the box beside each name. Then assign each member a unit. Family h, Will (This Client is already checked in) ett-Smith, Jada
Household M To inclu 2) Two Parent I (14) Smith (12) Pinke (15) Smith	Aembers ude Household members in this Check In, click the box beside each name. Then assign each member a unit. Family h, Will (This Client is already checked in) h, Jaden (This Client is already checked in)

6. In the Household Members section, assign the new household member a Unit.

▼ Household Members									
Household members associated with this Check In appear checked below. Click Assign Unit to change the unit for a member. To include additional household members, click Check In Additional Family Members.									
(2) Two Pare	(2) Two Parent Family Check In Additional Family Members								
[™] <u>(14) 5</u>	Smith, Will	Room 2 - Family	Bed 001	Assign Unit					
C (17) Pinkett-Smith, Jada Overflow									
Image: Room 2 - Family Bed 002									
ा <u>(15) इ</u>	Smith, Willow	Room 2 - Family	Bed 003	Assign Unit					

6. Scroll to the bottom of the check-in screen and click "Save & Exit".

7. At this time, the newly added client(s) should be visible on the Unit List with a matching Group ID number to the rest of the household.

a 09/07/2022	House - 2	Room 2 - Family	Bed 001	(14) Smith, Will	02/19/1982	Male	9	No	
a 09/07/2022	House - 2	Room 2 - Family	Bed 002	(16) Smith, Jaden	06/28/1999	Male	9	No	
09/07/2022	House - 2	Room 2 - Family	Bed 003	(15) Smith, Willow	07/15/2002	Female	9	No	
09/21/2022	House - 2	Room 2 - Family	Bed 004	(17) Pinkett-Smith, Jada	04/30/1983	Female	9	No	

8. Click on the newly added client(s)' name to access their check-in screen. Complete their entry assessment. Click "Save & Exit" once complete.