CLIENTPOINT

AMELIA RAMSARAN
CMIS PROGRAM MANAGER

FRANCES ANN MARQUEZ
DATA SUPPORT SPECIALIST

CMIS.SUPPORT@HOUSINGALLIANCEDE.ORG

HOUSING ALLIANCE DELAWARE

TRAINING OVERVIEW

This details how to utilize **ClientPoint** for the following project types:

1. Emergency Shelter (large or congregate only)
2. Rapid Re-Housing
3. Permanent Supportive Housing (scattered site)
4. Homeless Prevention
5. Diversion
6. Service Only

TABLE OF CONTENTS

BACK DATE

- Necessary when data entered in CMIS is after client intake
  - Entering/exiting clients
  - Services provided
  - Updating information during project stay

- **TIP**: If the exact time is unknown, use the following:
  - 6:00 PM for project entries
  - 11:00 PM for updates and exits

Where to find it?

On the upper right corner, select "Back Date"

What to do?

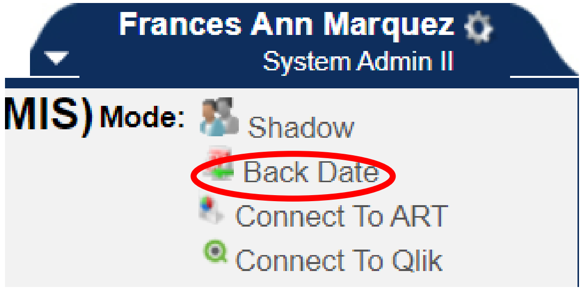
Adjust the date and time, then click on "Set Back Date"

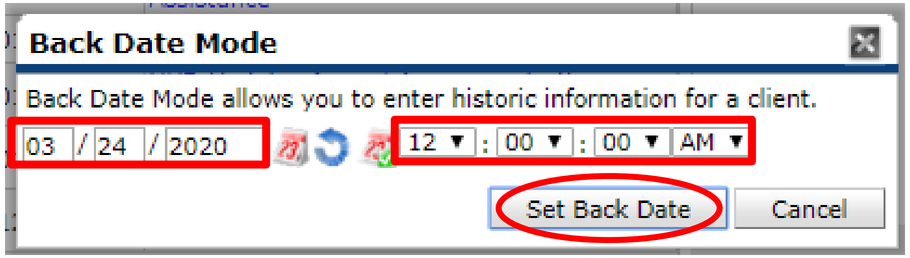
How to know?

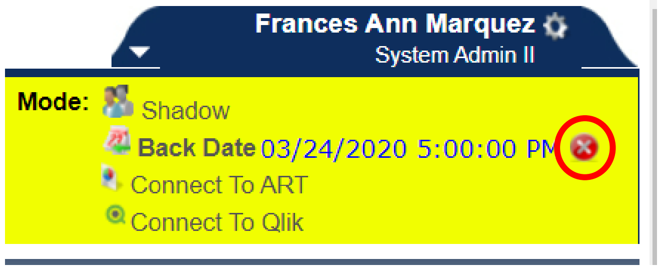
If activated, the top bar will be yellow

How to end?

To stop Back Date, click on the red X next to it

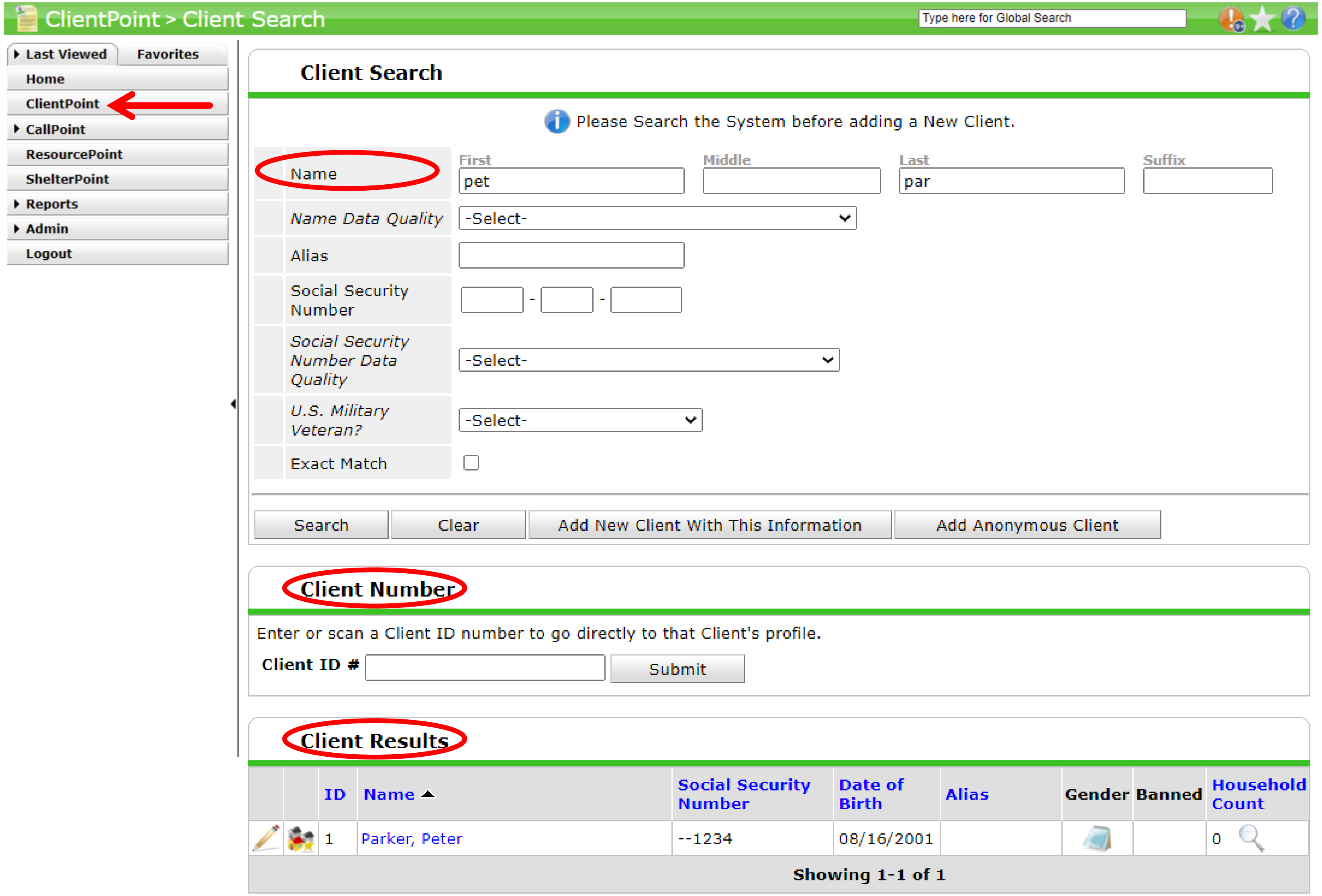






CLIENT SEARCH

- Select ClientPoint in menu bar
- Ways to search profiles:
  1. Client's first and last name
     - To widen search results, type in only a part of the first and last name
     - If multiple profiles appear in Client Results, match client through Date of Birth and SSN
  2. Client ID #



CLIENT SEARCH FAQ

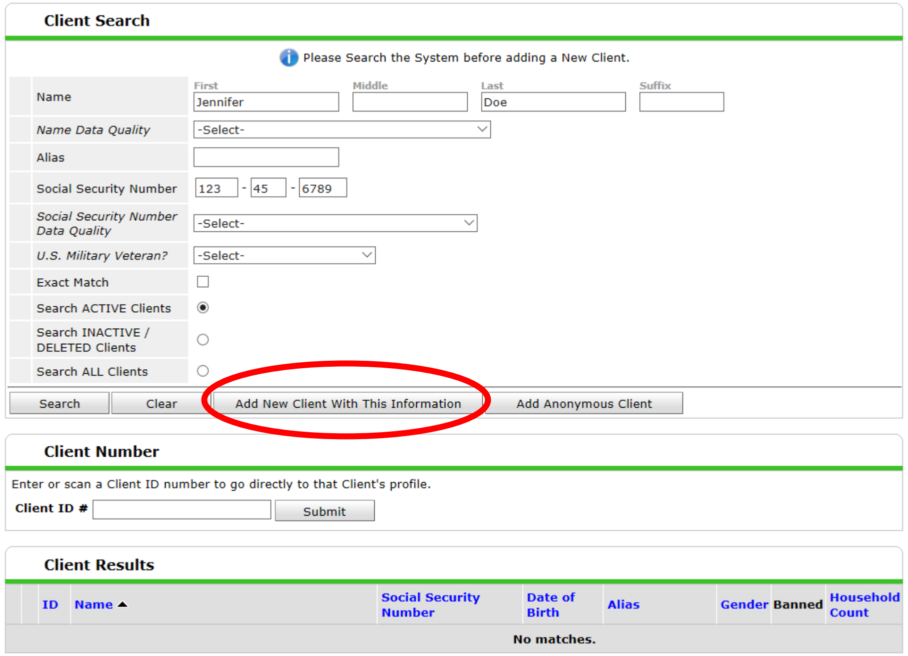
- **Q: What if I can't find the profile?**
  - Double check the spelling of your client's name.
  - All clients referred by Centralized Intake already has a profile in ClientPoint.
  - If the client has not contacted Centralized Intake and does not appear to be in the system, **you will need to create a profile for them.**

- **Q: What if there are duplicate profiles?**
  - Enter information into the profile that has the ***lower*** client ID number.
  - Email **cmis.support@housingalliancede.org** with the concerned Client ID numbers and they will merge the profiles.
    - After a Client Merge, the profile with the lower client ID number will be the remaining profile.

CREATING A NEW CLIENT PROFILE

Profile already created for your client? **SKIP THIS SECTION.**

1



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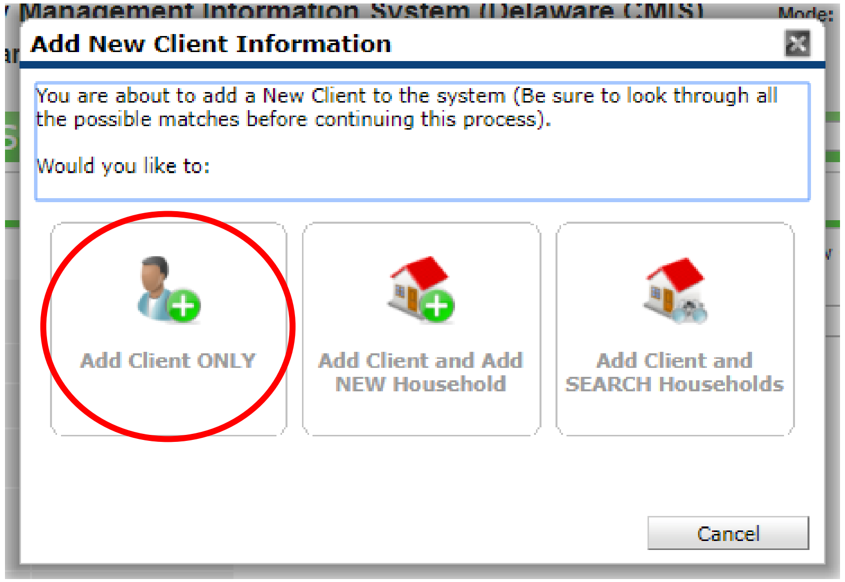
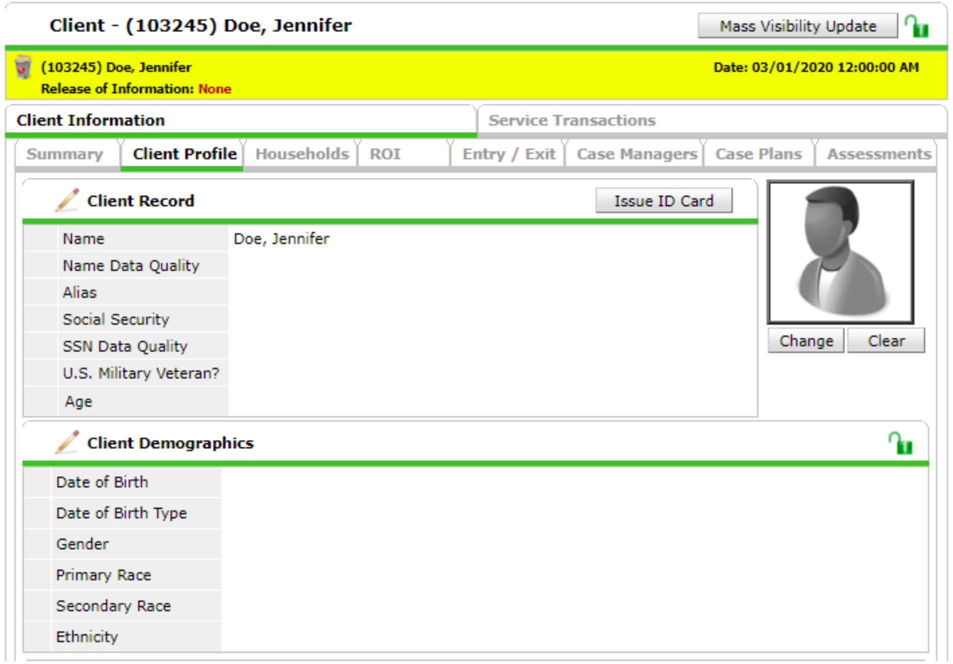


CREATING A NEW PROFILE

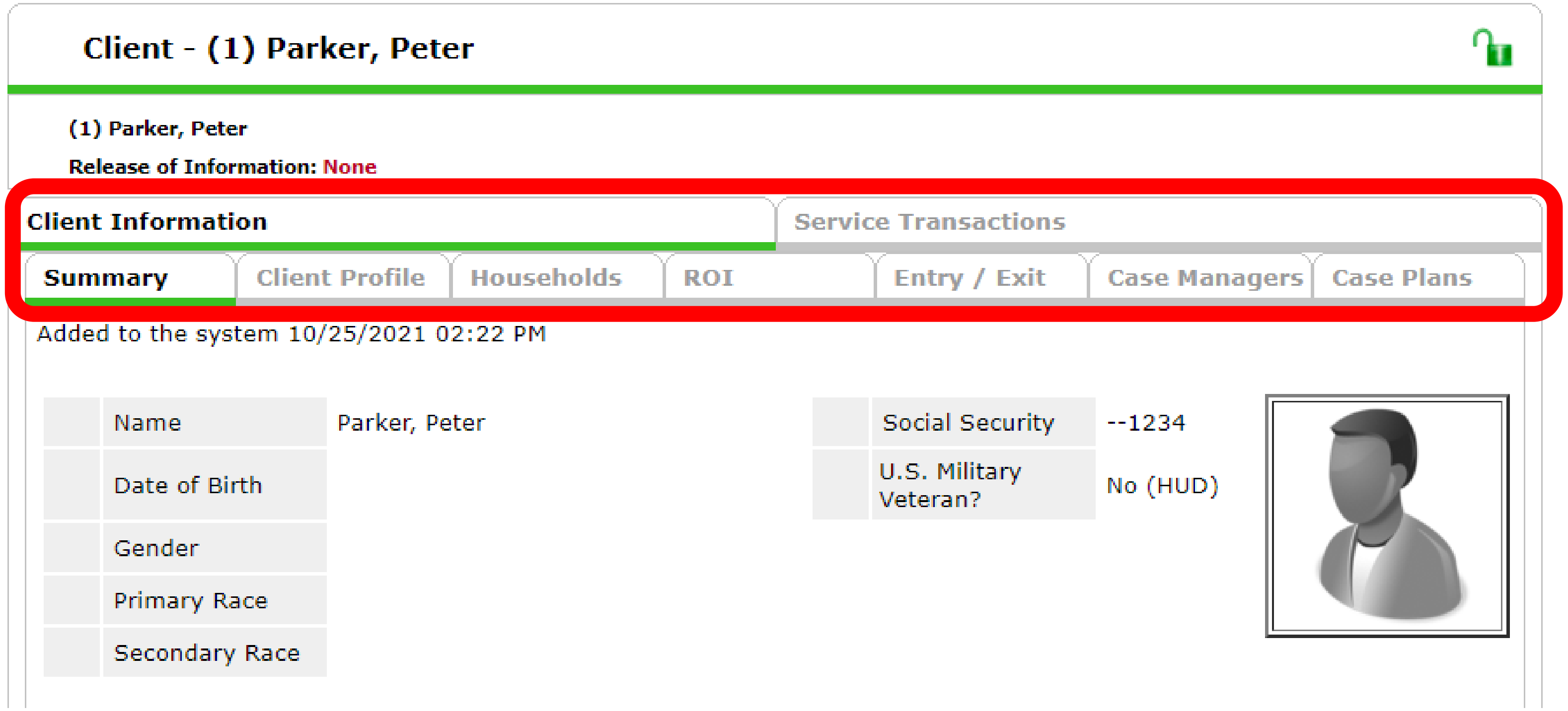
1. In Client Search,
   - Add first and last name, SSN, and Veteran Status
   - Select "Add New Client with This Information"
2. Built-in prompts may ask for confirmation to **Add Client Only**
3. Once created, a blank profile will appear.
   - Client can now be entered into a program

3



NAVIGATION TABS

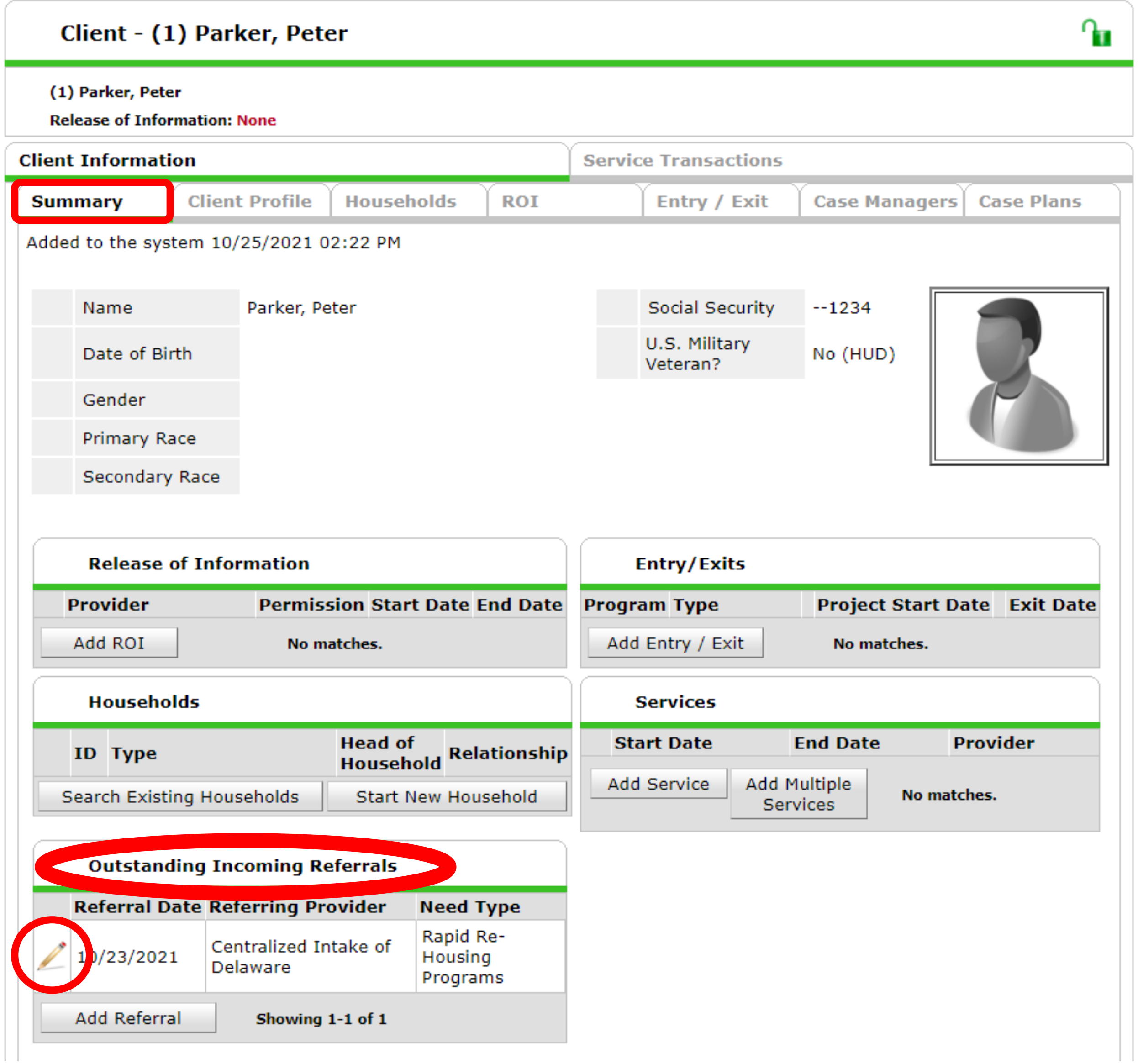
- These tabs are where client information will be added
  - A. Client Information
    1. Summary
    2. Client Profile
    3. Households
    4. ROI
    5. Entry/Exit
    6. Case Managers
    7. Case Plans
  - B. Service Transactions

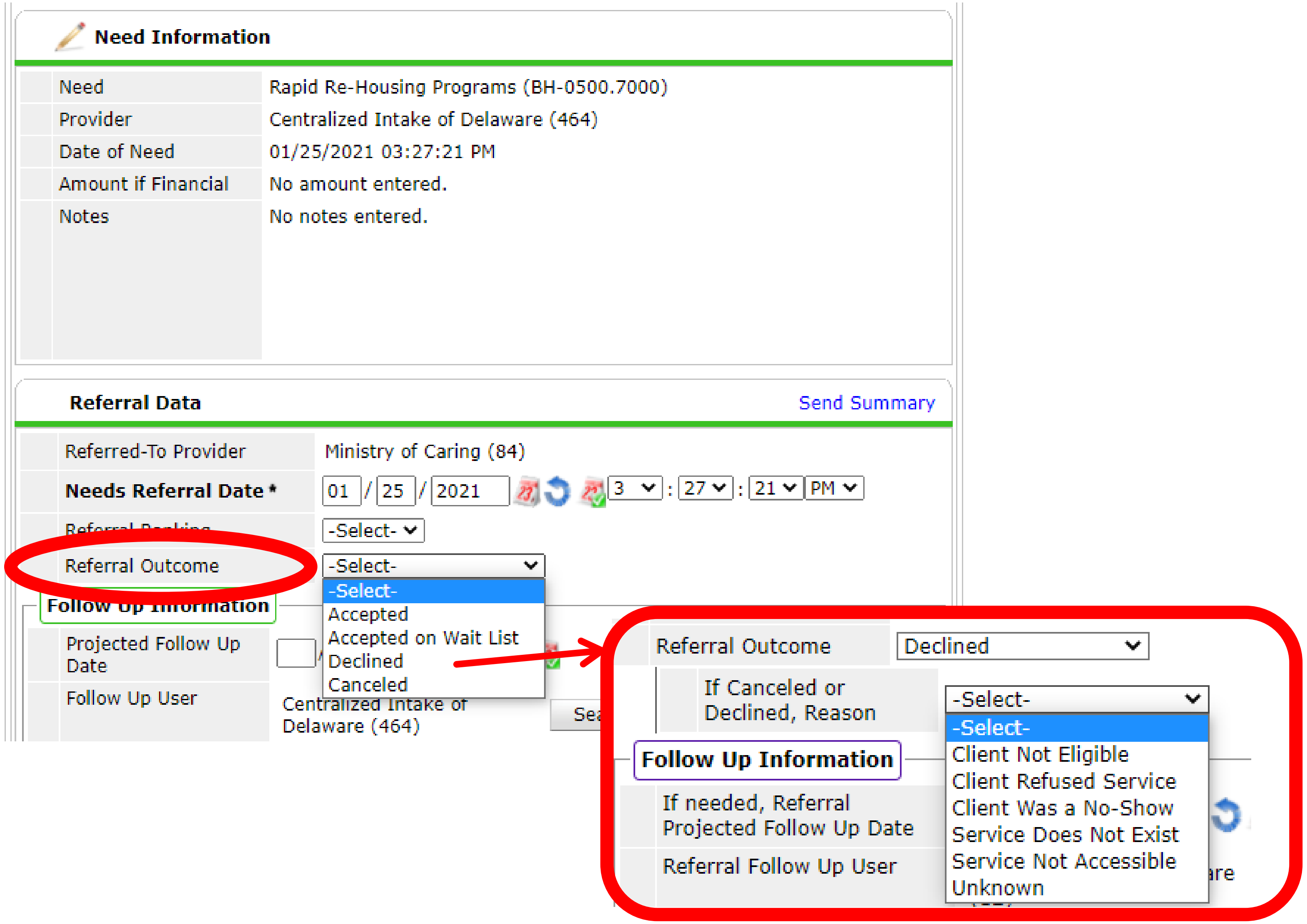


REFERRALS – SUMMARY TAB

- If Centralized Intake sends referrals to your organization for **Rapid Re-Housing** or **Diversion**, they will appear in the **Outstanding Incoming Referrals** box of the Summary tab

- To update a referral, click on the **pencil icon**



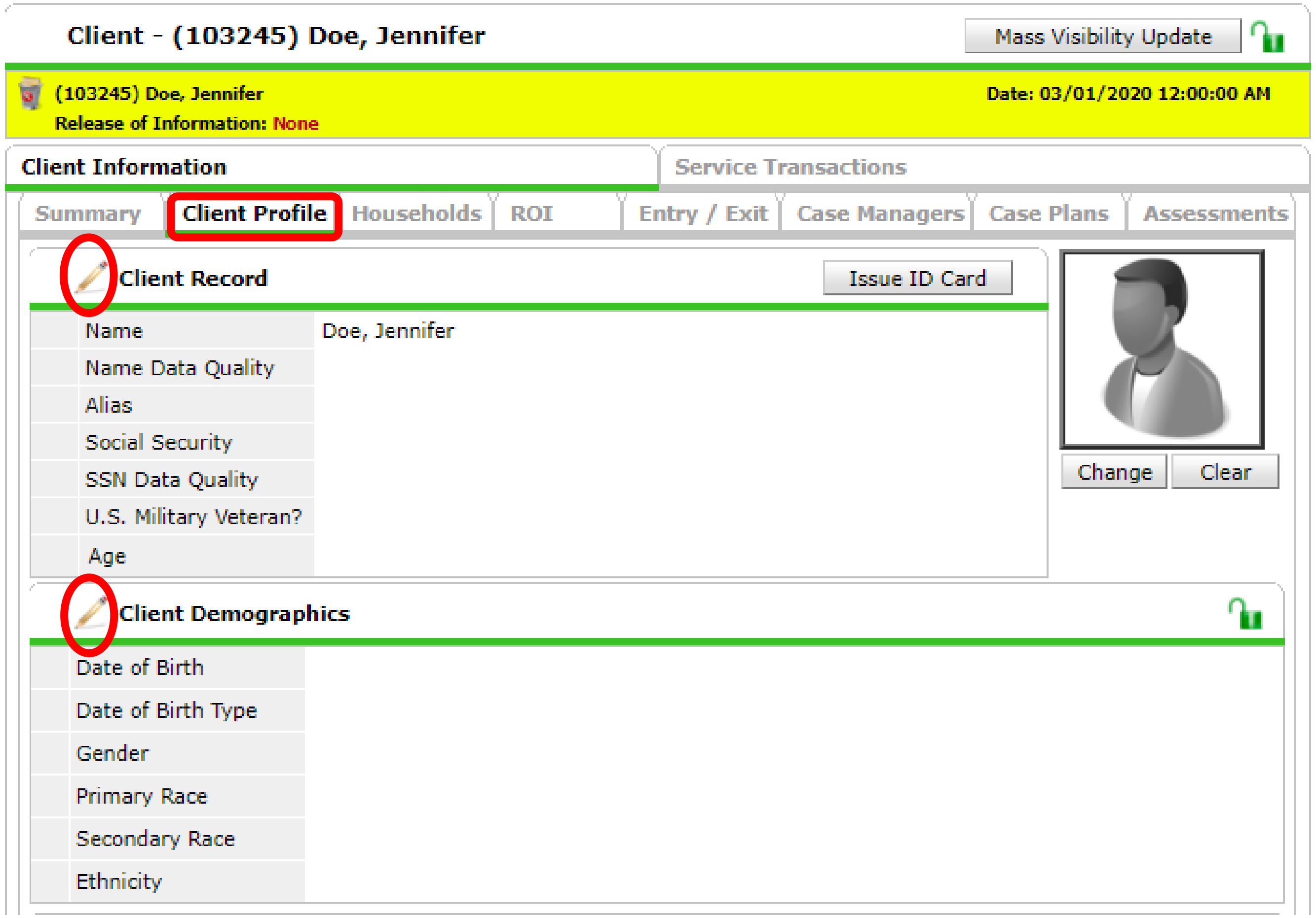


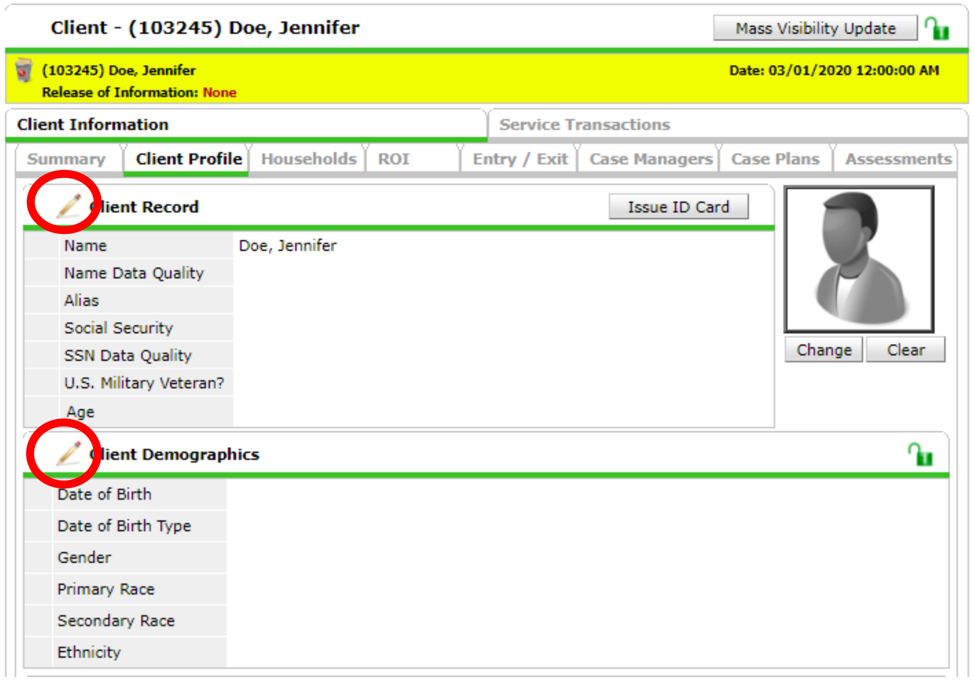
UPDATING REFERRALS

- Select the appropriate referral outcome per client
  - **ACCEPTED** – Client was enrolled into provider's program
  - **DECLINED** – Provider's decision to not accept a client
  - **CANCELED** – Client's decision to not enter a program (no show or decided not to)
- Select the Reason for a Declined/Canceled referral

CLIENT PROFILE TAB

To edit Client Profile information, select the **pencil icon** next to Client Record or Client Demographics





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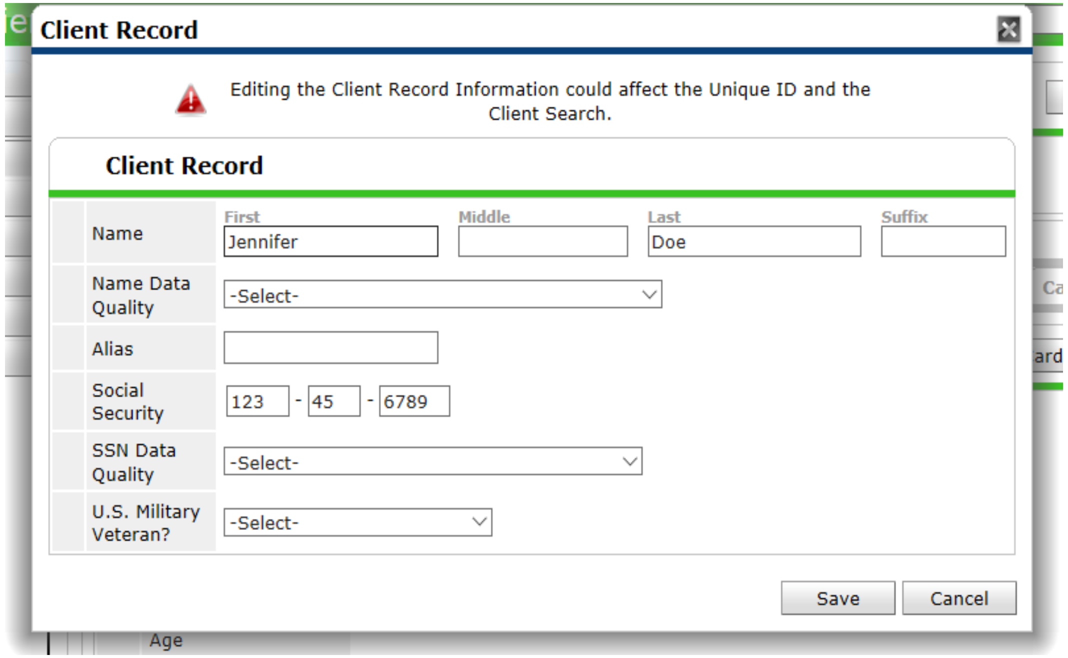
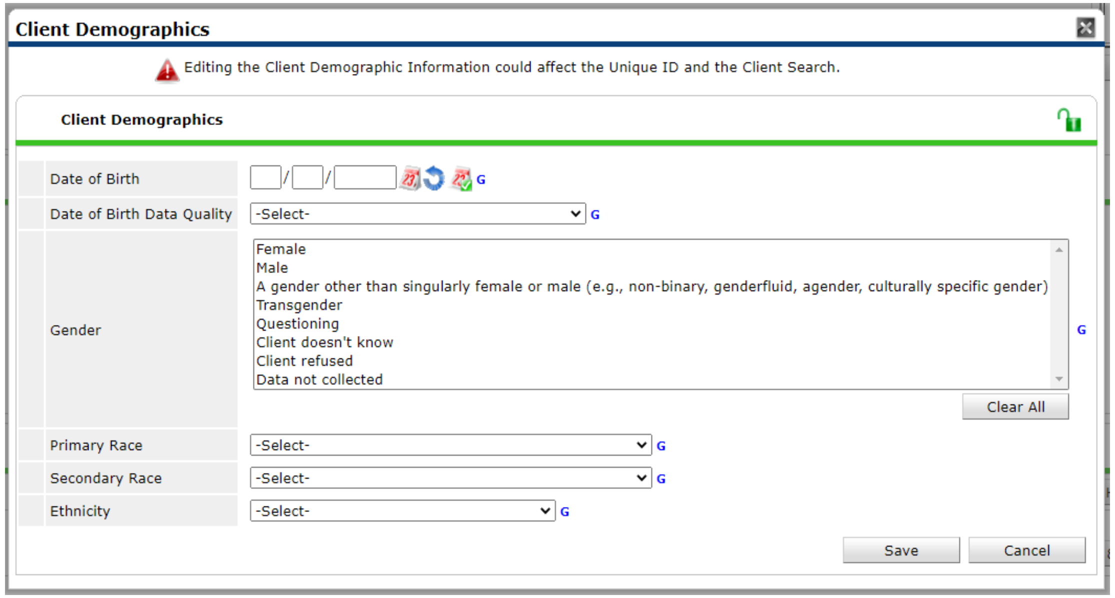


2

1. To edit any information, click on the pencil icon
   - **Complete/Update as many fields as possible**
2. Client Record
   - Data Quality for Name and SSN are required
3. Client Demographics
   - Data Quality for Date of Birth is required
   - Gender – multiple answers can be selected as the Ctrl-button is held
   - Ethnicity and Race are different questions each client needs answered



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HOUSEHOLDS TAB

Need to CREATE a Household? **CLICK HERE**.

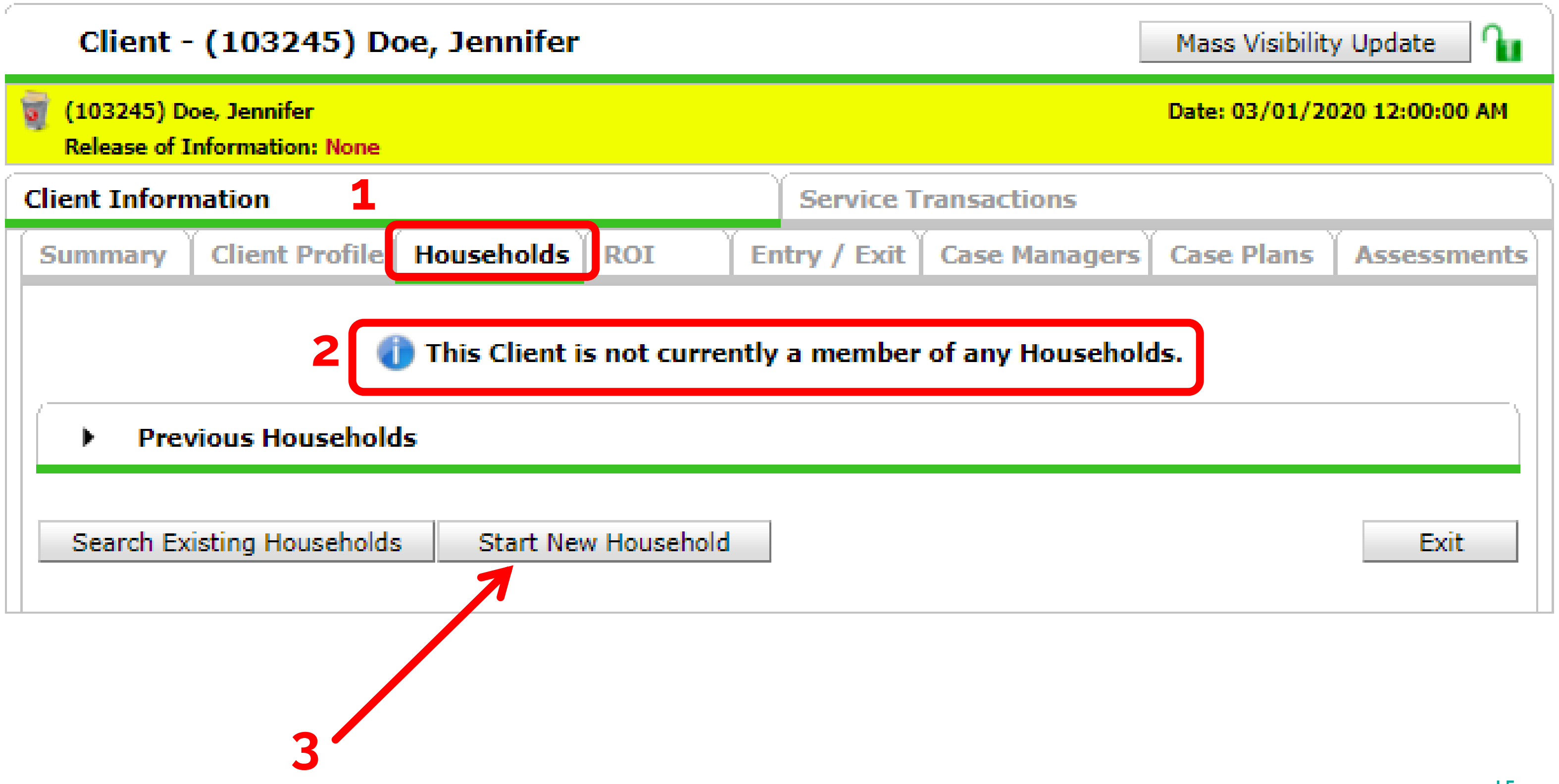
Need to MANAGE a Household? **CLICK HERE**.

HOW TO CREATE A NEW HOUSEHOLD

1. Go to client's profile and click on **Households** tab

2. Confirm that client is not currently part of a household

3. Select "**Start New Household**"



(Client already part of a household and needs to be edited? **CLICK HERE**)

CREATING A NEW HOUSEHOLD

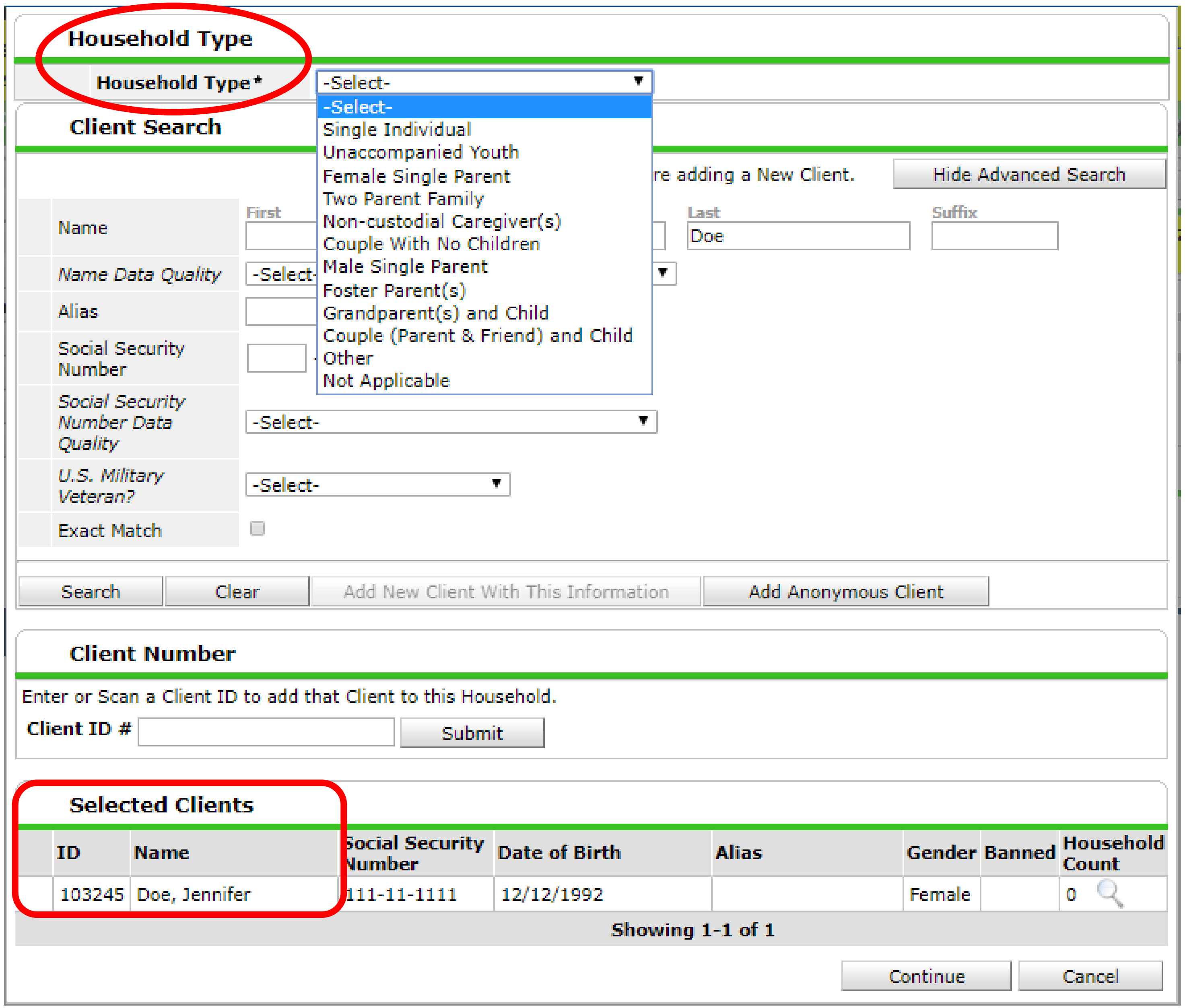
1. Select appropriate **Household Type**

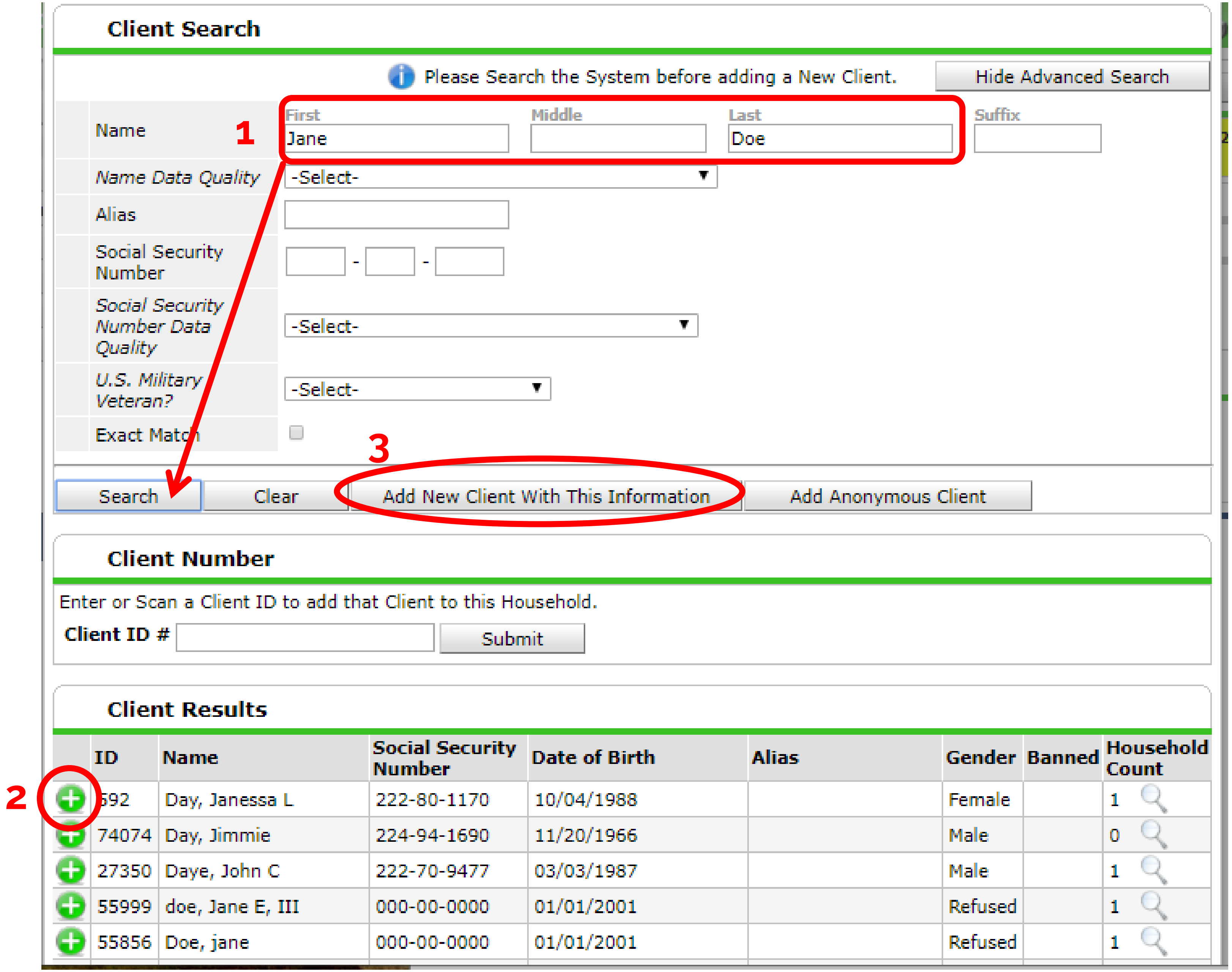
2. Included clients are listed under **Selected Clients**

To add other household members, see next slide →

1

2





ADDING HOUSEHOLD MEMBERS

1. Use **Client Search** to find other household members
2. If correct client appears under **Client Results**, click on the green plus icon to add them
3. If no matches under Client Results, select "**Add New Client With This Information**"
   - Update new profiles accordingly

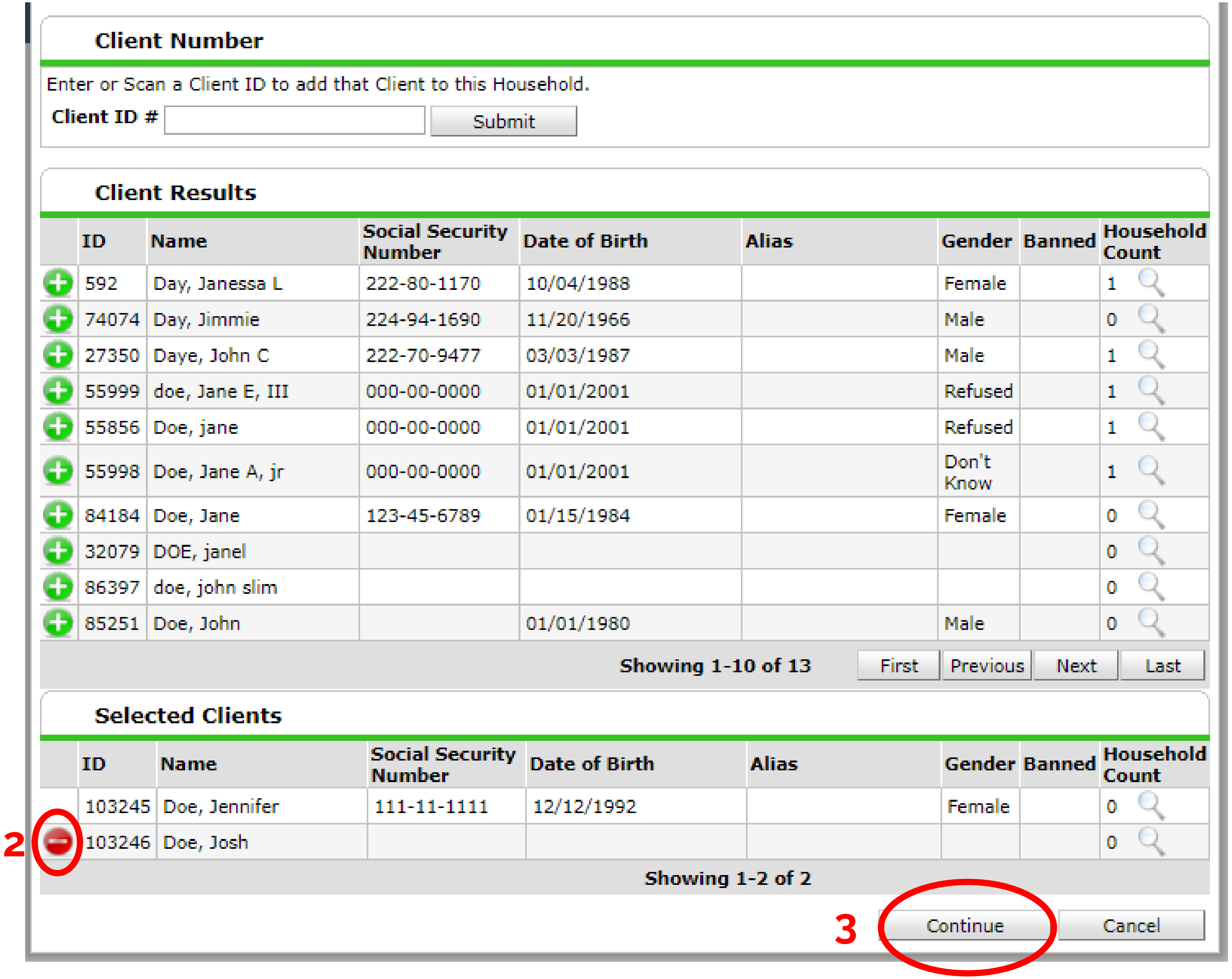
Q: HOW TO KNOW IF CORRECT CLIENT(S) WERE SELECTED?

A: Check the names under Selected Clients

1. Repeat process from previous slide until household is complete

2. To remove an incorrect profile, click on **red minus icon**

3. If all is correct, click Continue



Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID # [ ] Submit

Client Results

	ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	592	Day, Janessa L	222-80-1170	10/04/1988		Female		1
	74074	Day, Jimmie	224-94-1690	11/20/1966		Male		0
	27350	Daye, John C	222-70-9477	03/03/1987		Male		1
	55999	doe, Jane E, III	000-00-0000	01/01/2001		Refused		1
	55856	Doe, jane	000-00-0000	01/01/2001		Refused		1
	55998	Doe, Jane A, jr	000-00-0000	01/01/2001		Don't Know		1
	84184	Doe, Jane	123-45-6789	01/15/1984		Female		0
	32079	DOE, janel						0
	86397	doe, john slim						0
	85251	Doe, John		01/01/1980		Male		0

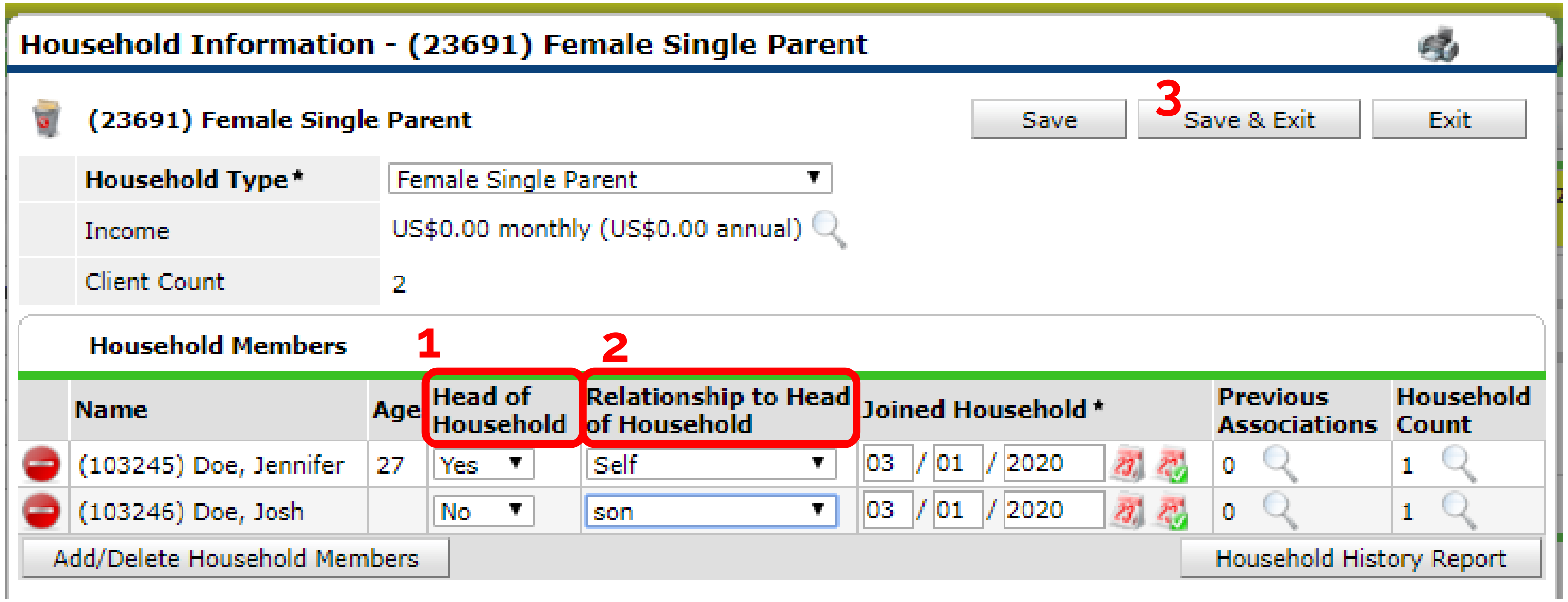
Showing 1-10 of 13 First Previous Next Last

Selected Clients

	ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	103245	Doe, Jennifer	111-11-1111	12/12/1992		Female		0
2	103246	Doe, Josh						0

Showing 1-2 of 2

3 Continue Cancel

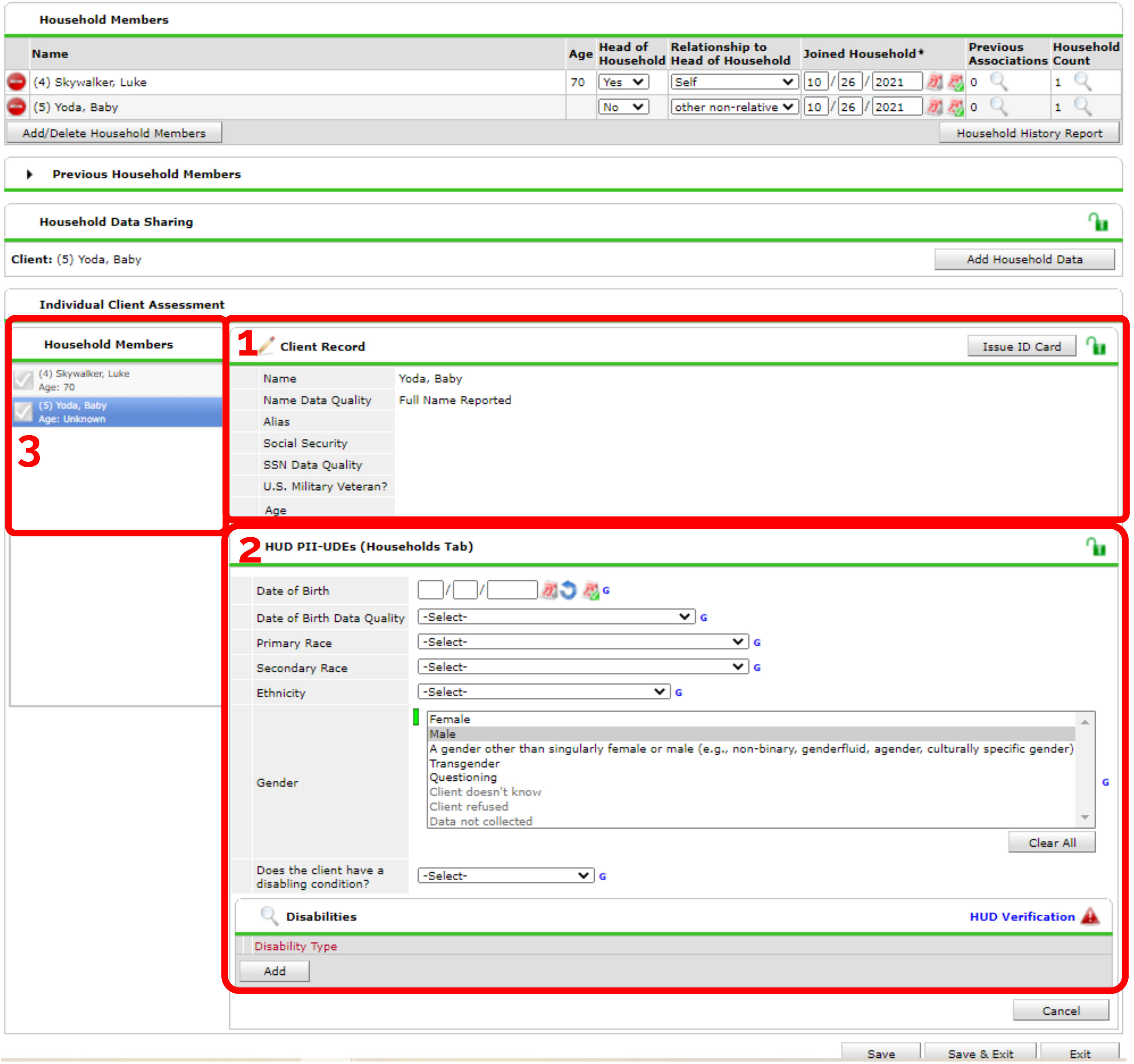


HEAD OF HOUSEHOLD

1. Select the Head of Household
    - ***There can only be one***, even in two parent/adult households
2. For the rest of the household members, select their Relationship to the Head of Household
3. Save and Exit

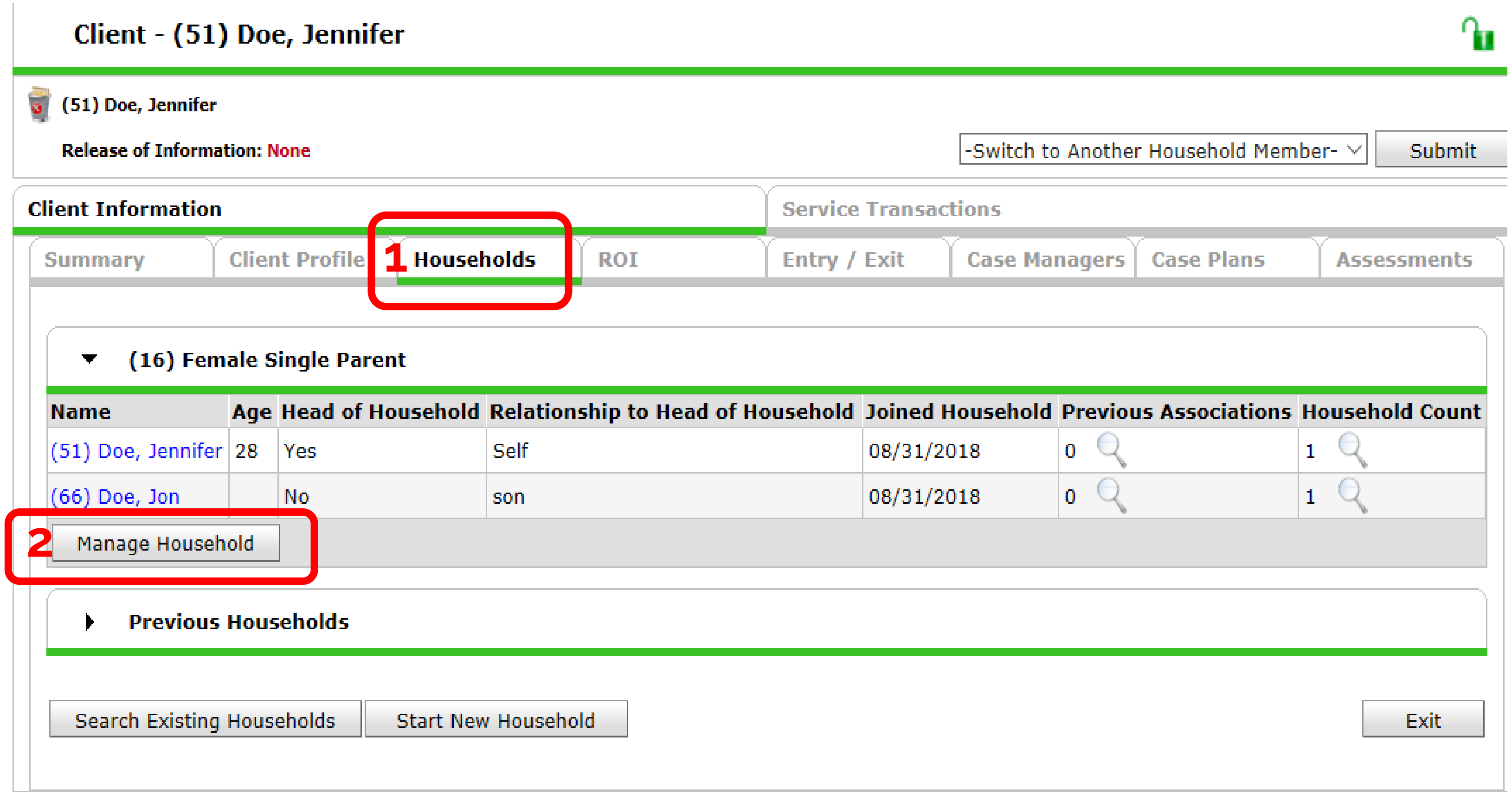
REMINDER: ASSESSMENTS FOR NEWLY CREATED CLIENTS

1. Ensure Client Record is complete
2. Provide all Universal Data Elements
   - Note: If Client Profile is complete, these still should be reviewed/updated for accuracy
3. Navigate to other client through Household Members section



HOW TO ADD MEMBERS TO AN EXISTING HOUSEHOLD

1. On client information, navigate to client's **Households** tab
2. Select **"Manage Household"**



NOTES:

- One household per client is sufficient
- Even with composition changes, ***always Manage Household*** instead of starting a new one
  - E.g.: additional children, new partner, extended family, etc.

ADDING CLIENTS TO EXISTING HOUSEHOLDS

PHOTO # 1

1. Adjust response to Household Type
2. Select Add/Delete Household Members

PHOTO # 2

3. Click on Add Clients to the Household to reveal search feature

<u>NOTE</u>: Do *not* delete clients that will not enter your program

PHOTO # 1

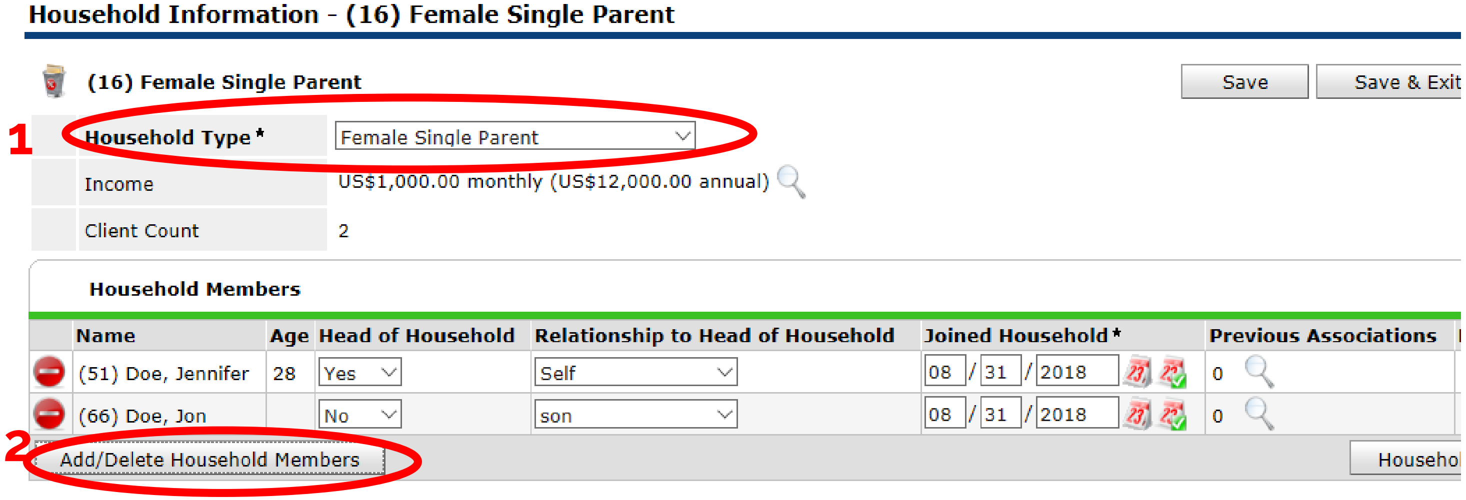
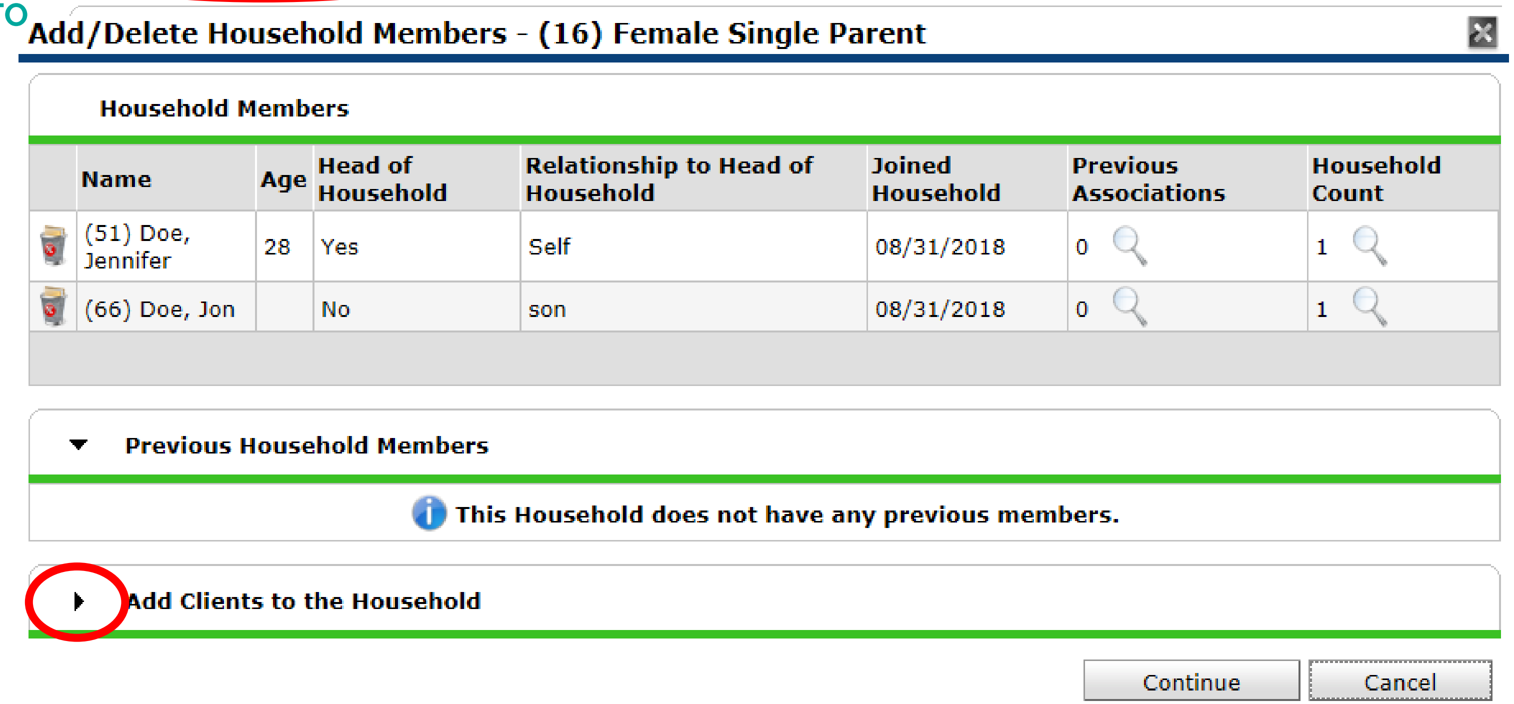


PHOTO # 2



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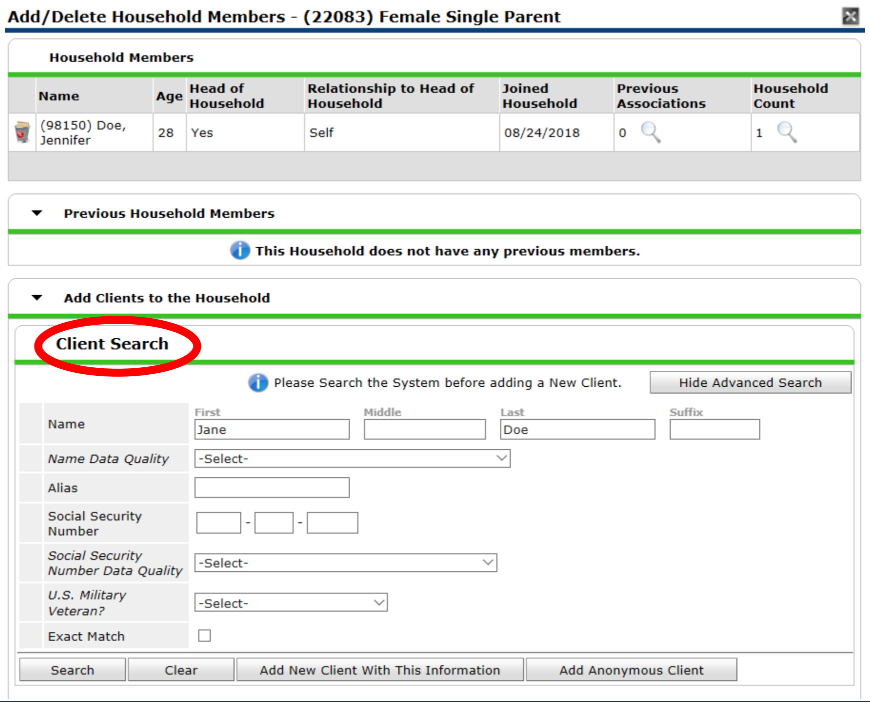

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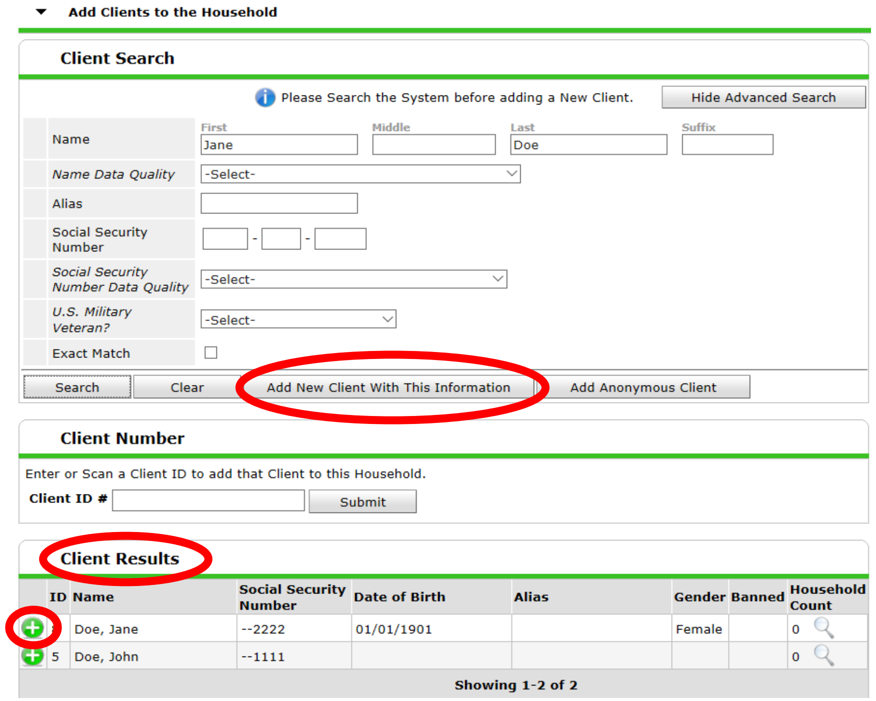
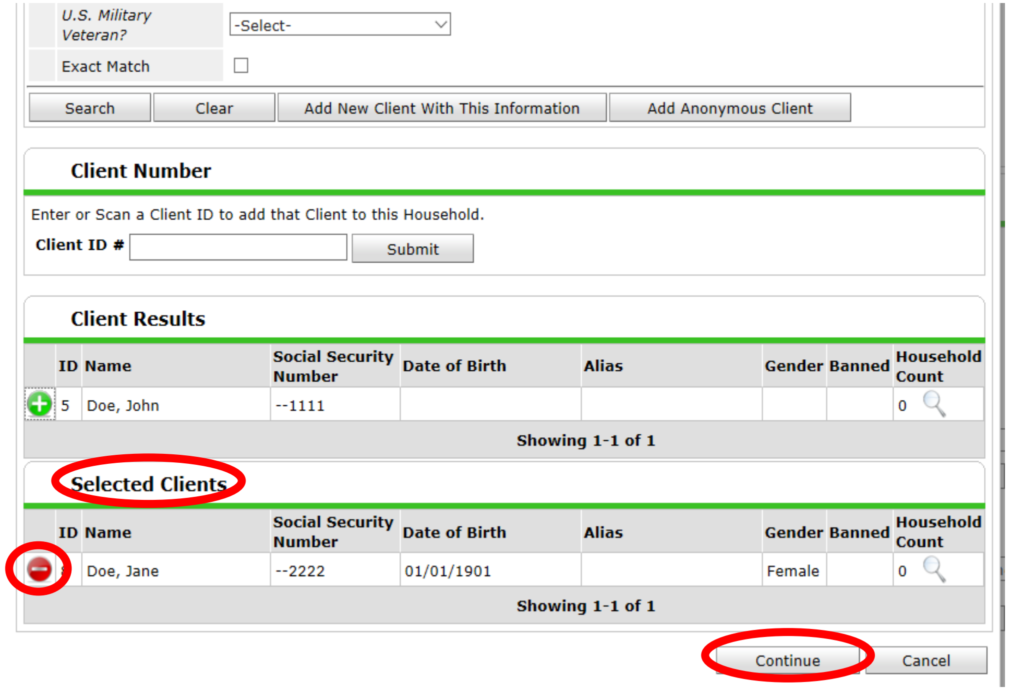


1. Use **Client Search** to check if a profile already exists
2. Client Results
   - If a profile exists, click on the green plus icon to add client
   - If none, select "Add New Client With This Information"
3. Selected Clients
   - Clients should appear here after Step 2
   - Click on red minus icon to remove any client
   - Repeat process until all new members have been added
   - Click on Continue when finished

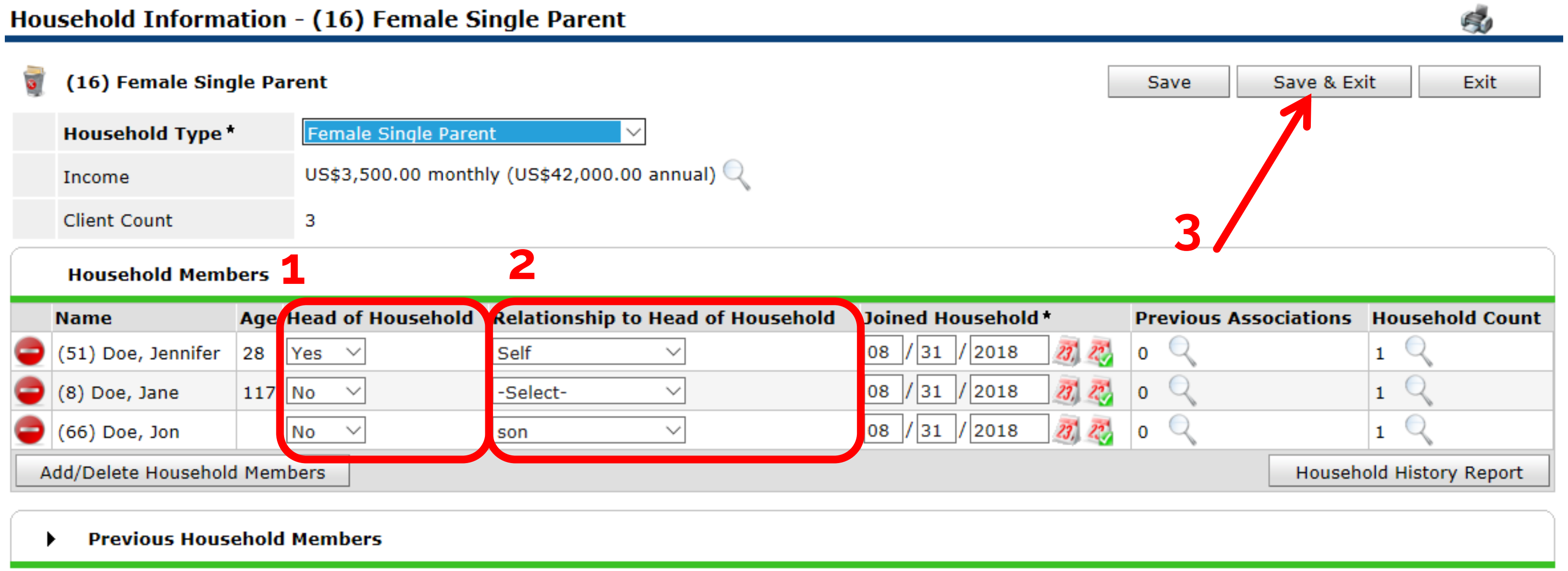
3



FINAL REMINDERS FOR ADDING TO EXISTING HOUSEHOLDS

1. Ensure there is only **one** Head of Household
2. Select Relationship to Head of Household for each additional member
3. Save and Exit when finished

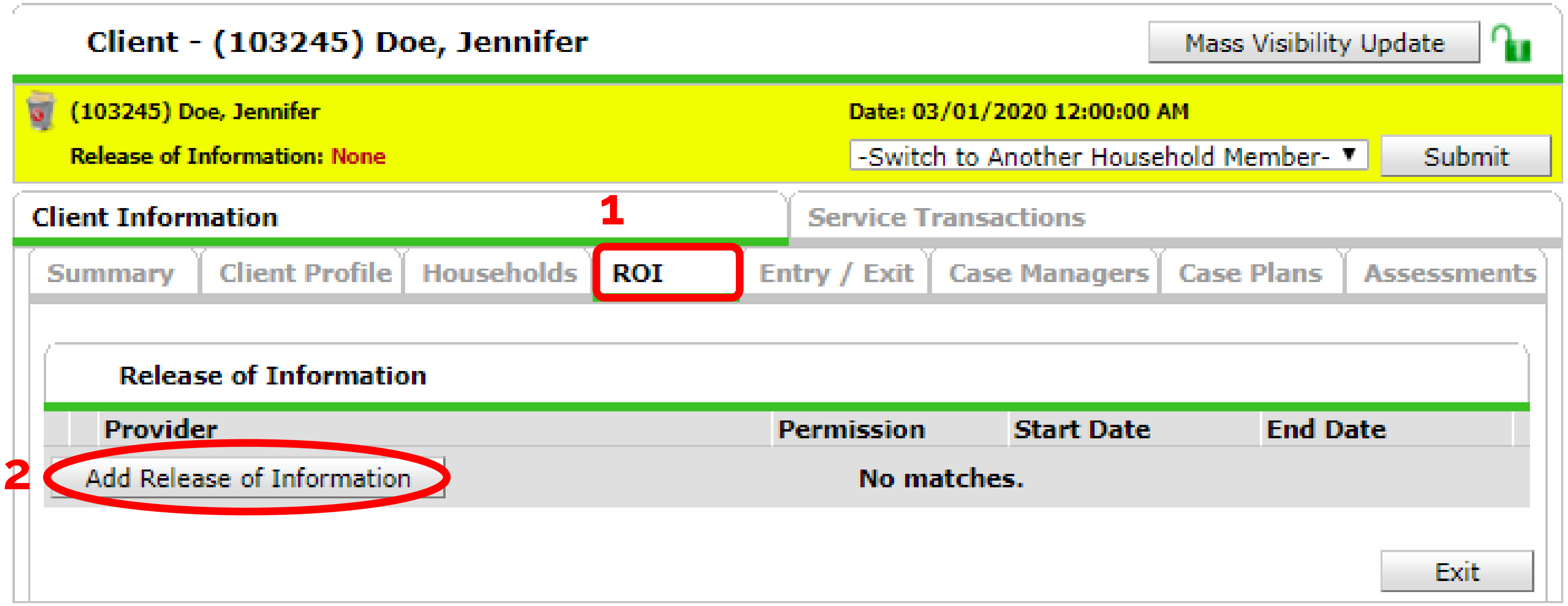
NOTE: The household is complete if every member that your project is serving is under the same household group



HOW TO ADD A RELEASE OF INFORMATION (ROI)

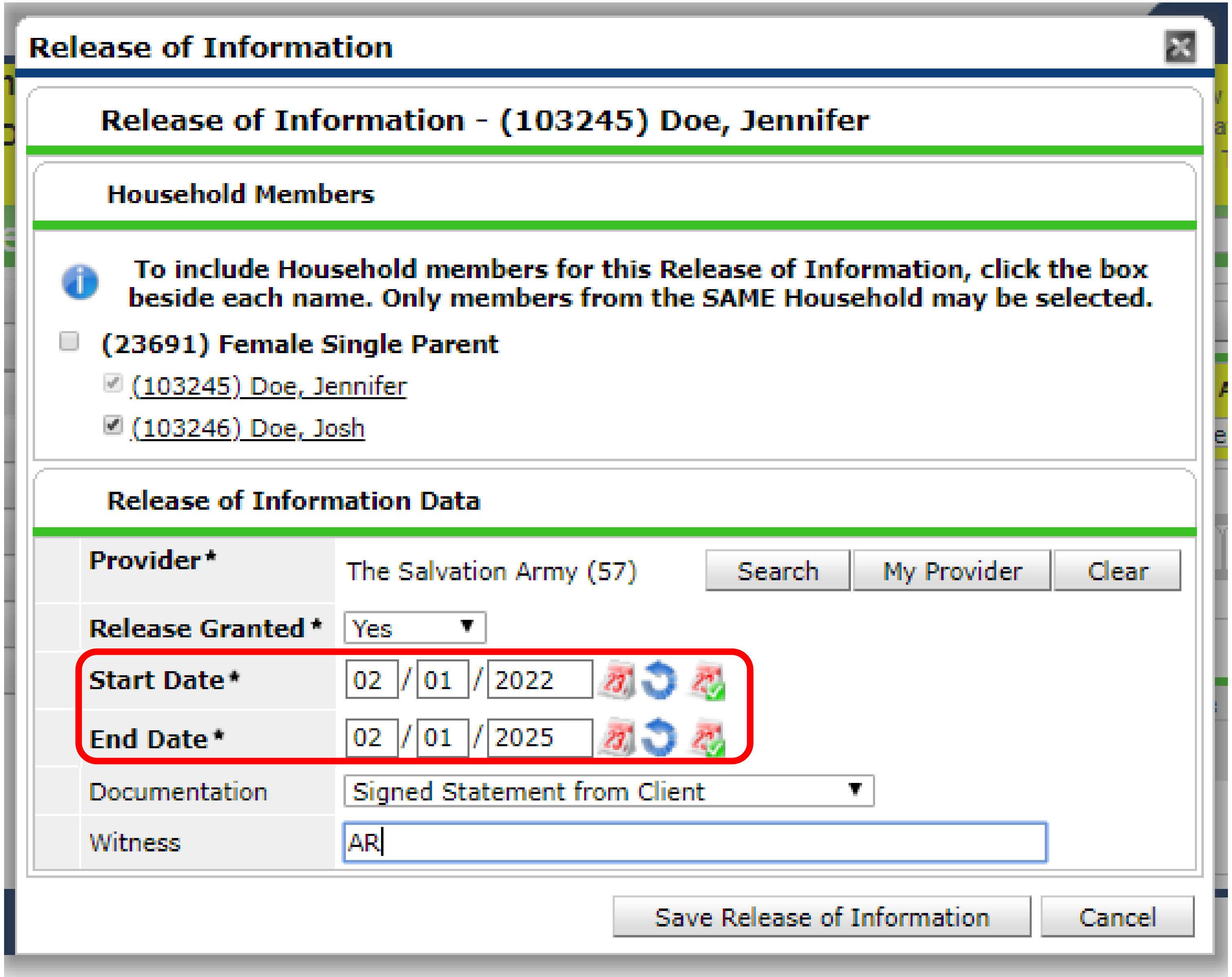
1. On the client's profile, navigate to the **ROI** tab

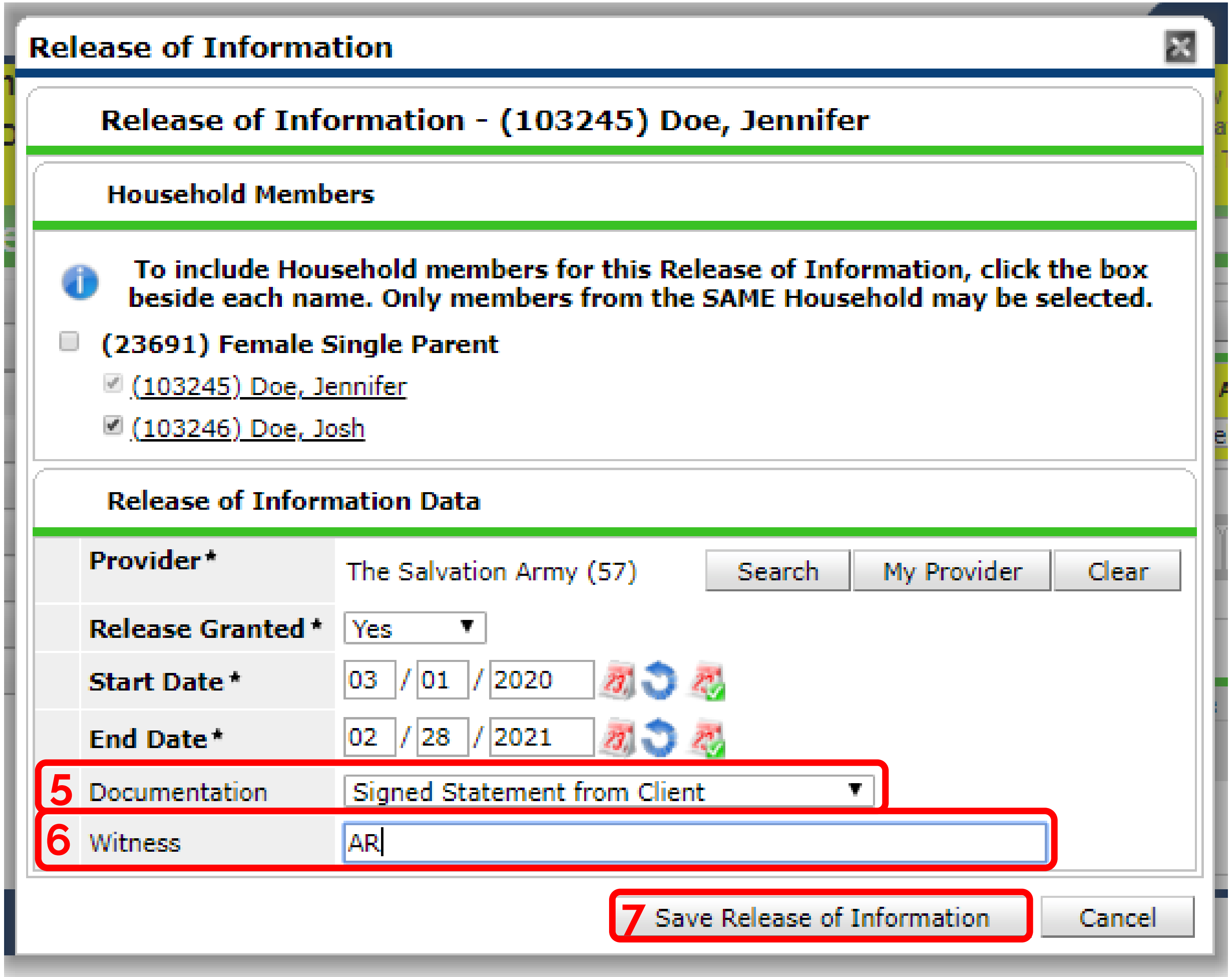
2. Select **Add Release of Information**



STARTING ON THE RELEASE OF INFORMATION

1. Check off each client entering your program
2. Choose your Parent Provider
3. Select Yes/No for Release Granted
4. Adjust Start and End dates based on date of enrollment
   - Validity is now up to **three years** (e.g. Start in 2022, End at 2025)





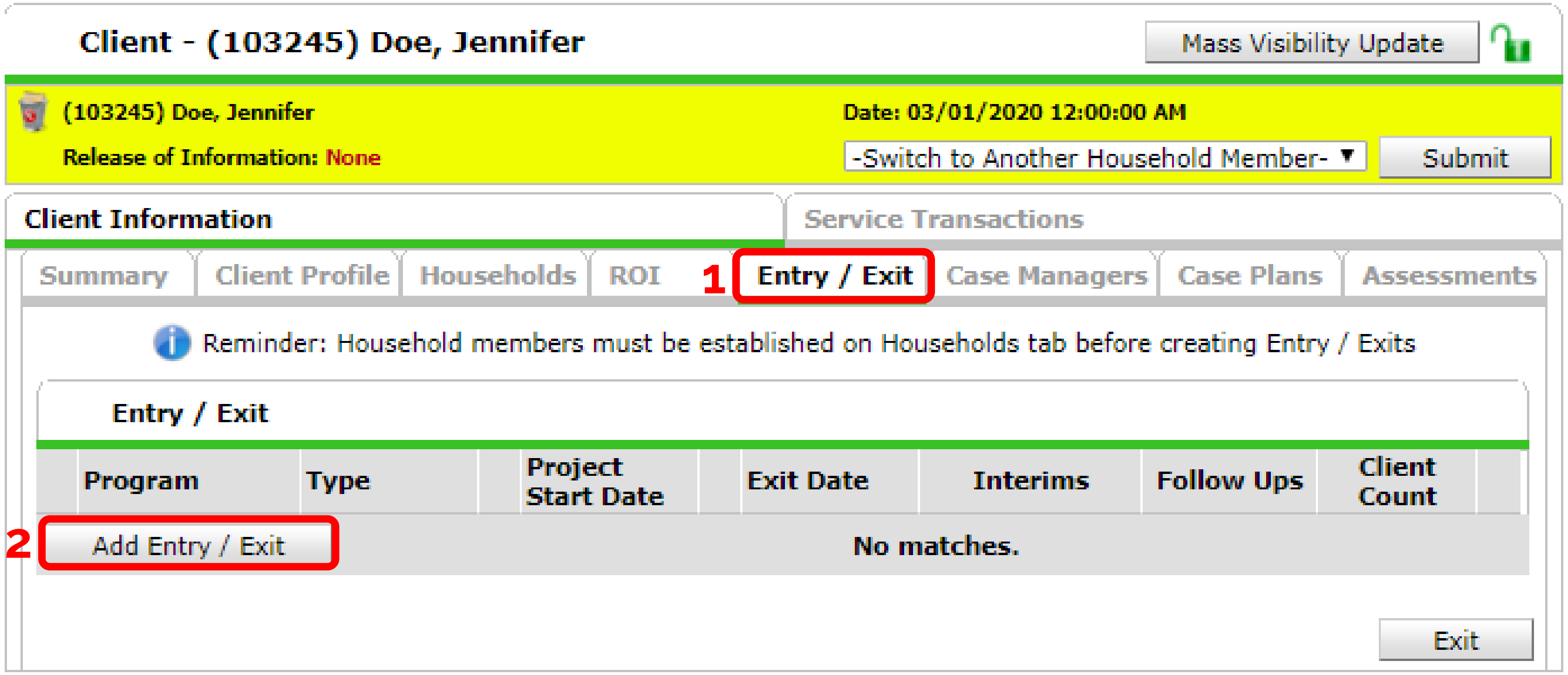
FINALIZING THE RELEASE OF INFORMATION

5. Select Documentation Type, which should be "Signed Statement from Client"
6. Add CMIS User's initials as Witness
7. Click on Save Release of Information

HOW TO ADD A PROJECT ENTRY – ENTRY/EXIT

1. On client information, navigate to the **Entry/Exit** tab

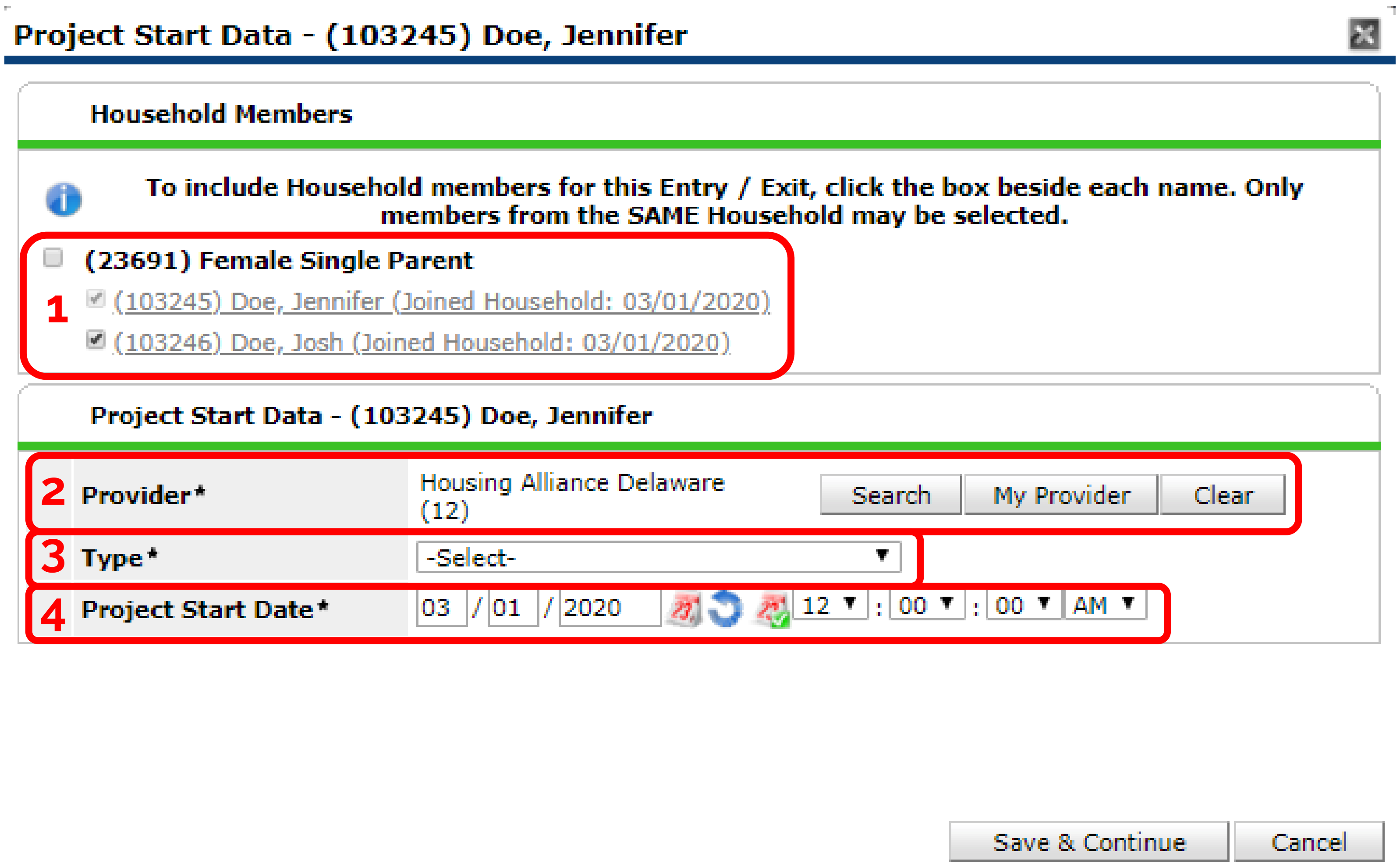
2. To create a new project entry through ClientPoint, select **Add Entry/Exit**

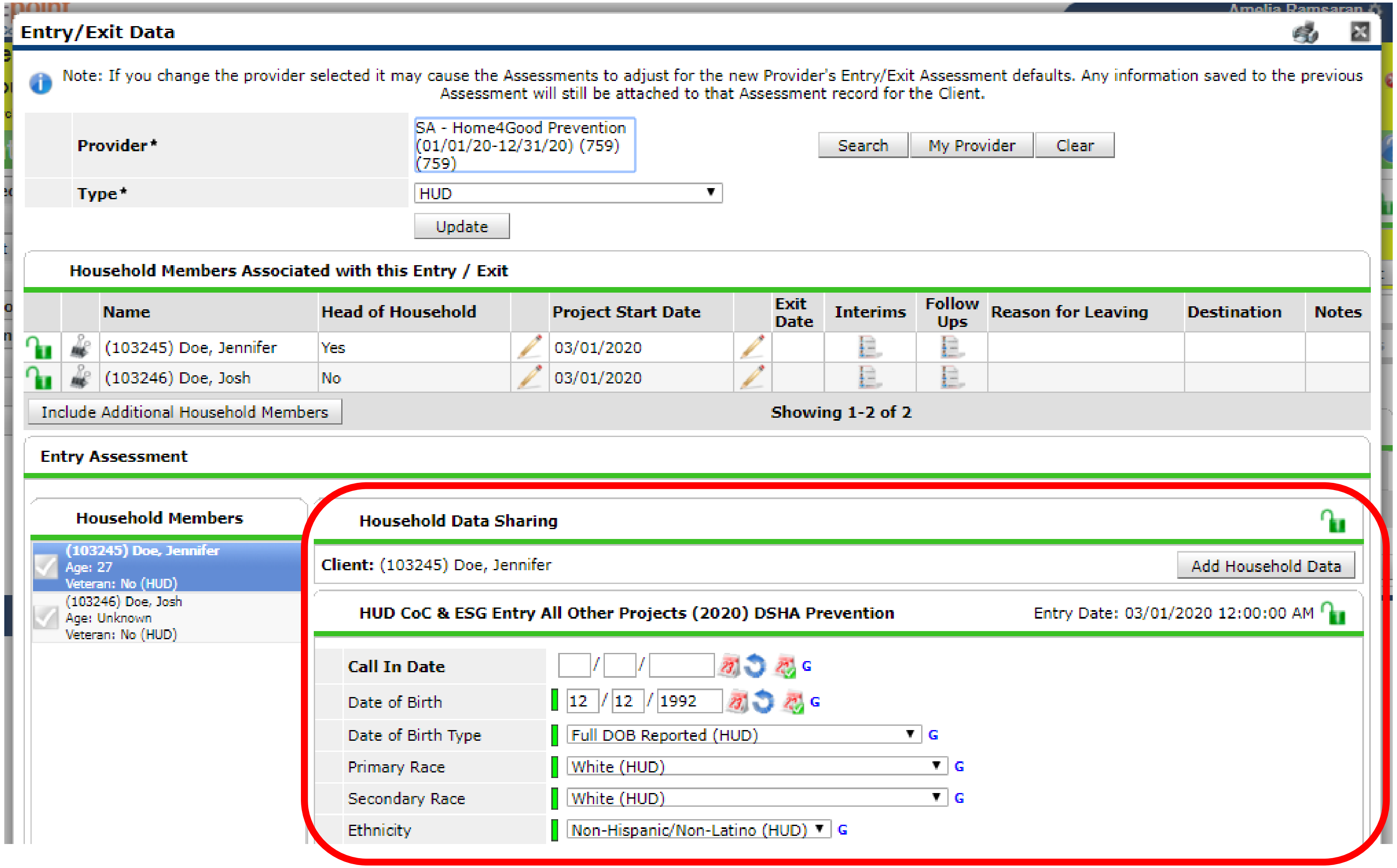


STARTING THE PROJECT ENTRY

1. Check off each client entering your project
2. For Provider, select your specific project
3. Select Type (always HUD, unless advised otherwise)
   - PATH
   - RHY
   - VA
4. Adjust client's date of entry if needed
   - ES = physical move in
   - TH/PSH/RRH = intake date

NOTE: PROJECT ENTRY IS EXPECTED TO BE COMPLETED WITHIN 3 DAYS OF THE CLIENT BEING ADMITTED INTO A PROGRAM.





COMPLETING ENTRY ASSESSMENTS

Notes:

- Information needs to be **updated** for *each client in each enrollment*, even when fields are not blank
- Assessments for children and all additional household members must be completed
  - Data from parents *do not* autofill fields for children
- Switch to next client using Household Members section

ENTRY ASSESSMENTS: PRIOR LIVING SITUATION

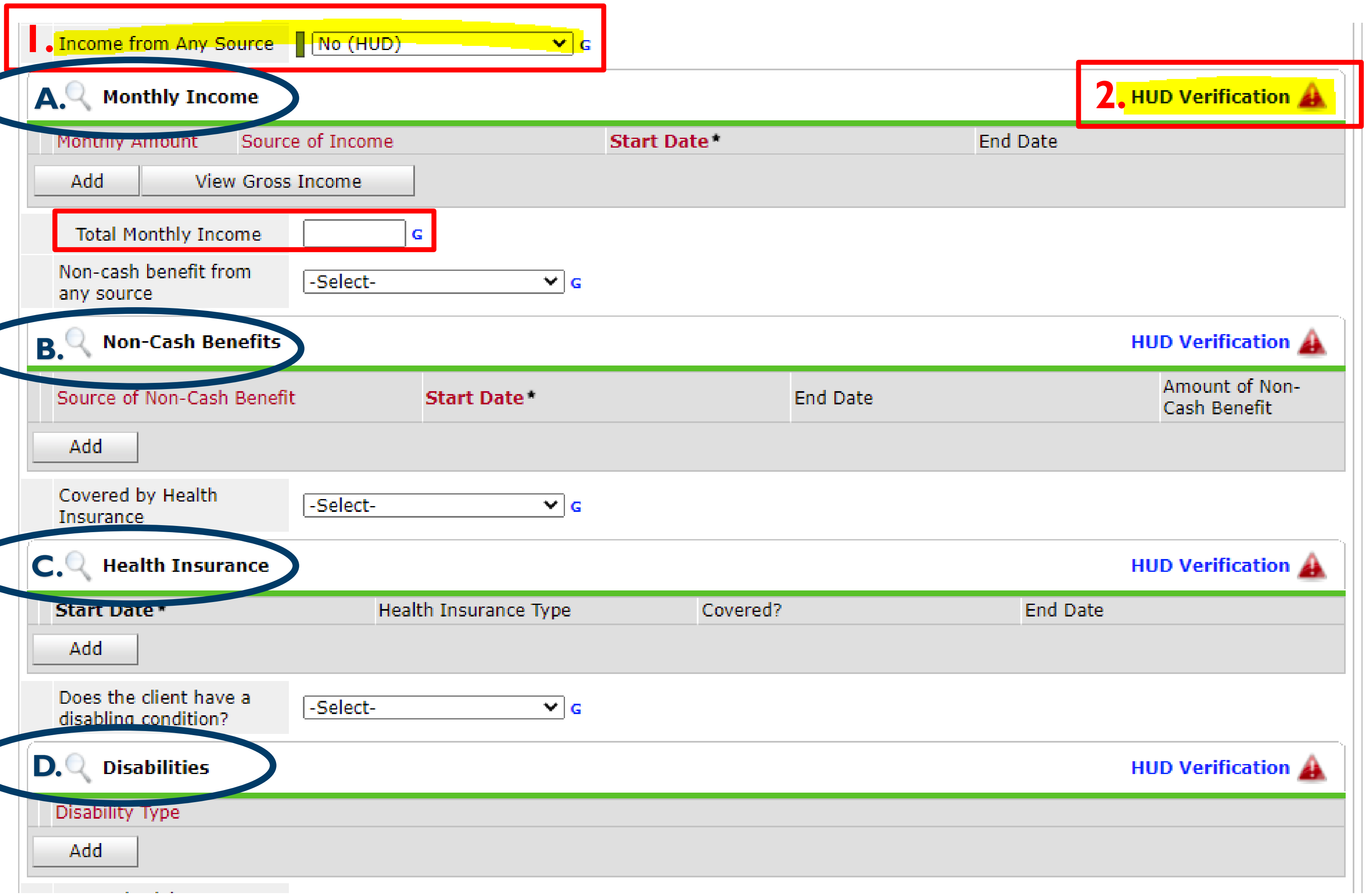
GUIDING QUESTION: Where did client sleep the night before their intake?

NOTES:

- All five fields need updating for *each* project enrollment
- Conditional logic is in place for TH, RRH, SO entries – bottom three questions may not appear depending on Prior Living Situation response
- Used to calculate a client's chronic homelessness (CH) status

Prior Living Situation	-Select-
Length of Stay in Previous Place	-Select- G
Approximate date homelessness started:	/ / G
Regardless of where they stayed last night - number of times the client has been on the streets or in ES in the past three years, including today	-Select- G
Total number of months homeless on the street or ES in the past three years	-Select- G

For client's most <u>recent</u> episode of homelessness, not the very first time



ENTRY ASSESSMENTS: 2-STEP PROCESS

Important sections:

A. Income
   - Also need to type in Total Monthly Income

B. Non-cash benefits

C. Health Insurance

D. Disabilities

2-Step Process

1. Select if Yes/No
2. Match with HUD Verification
   - If 'Yes' is selected for anything, type in additional data such as amount
   - The red triangle icon will change to a green check when completed

ENTRY ASSESSMENTS: HUD VERIFICATION

This table needs to match the previous Yes/No question.

NOTES:

- Selecting "No" from above will autofill all rows
- If any field applies to the client, manually change answer to "Yes"
  - For income, a pop-up window will ask for additional data (e.g. amount, notes, starting date)

HUD Verification: Monthly Income for 08/27/2018

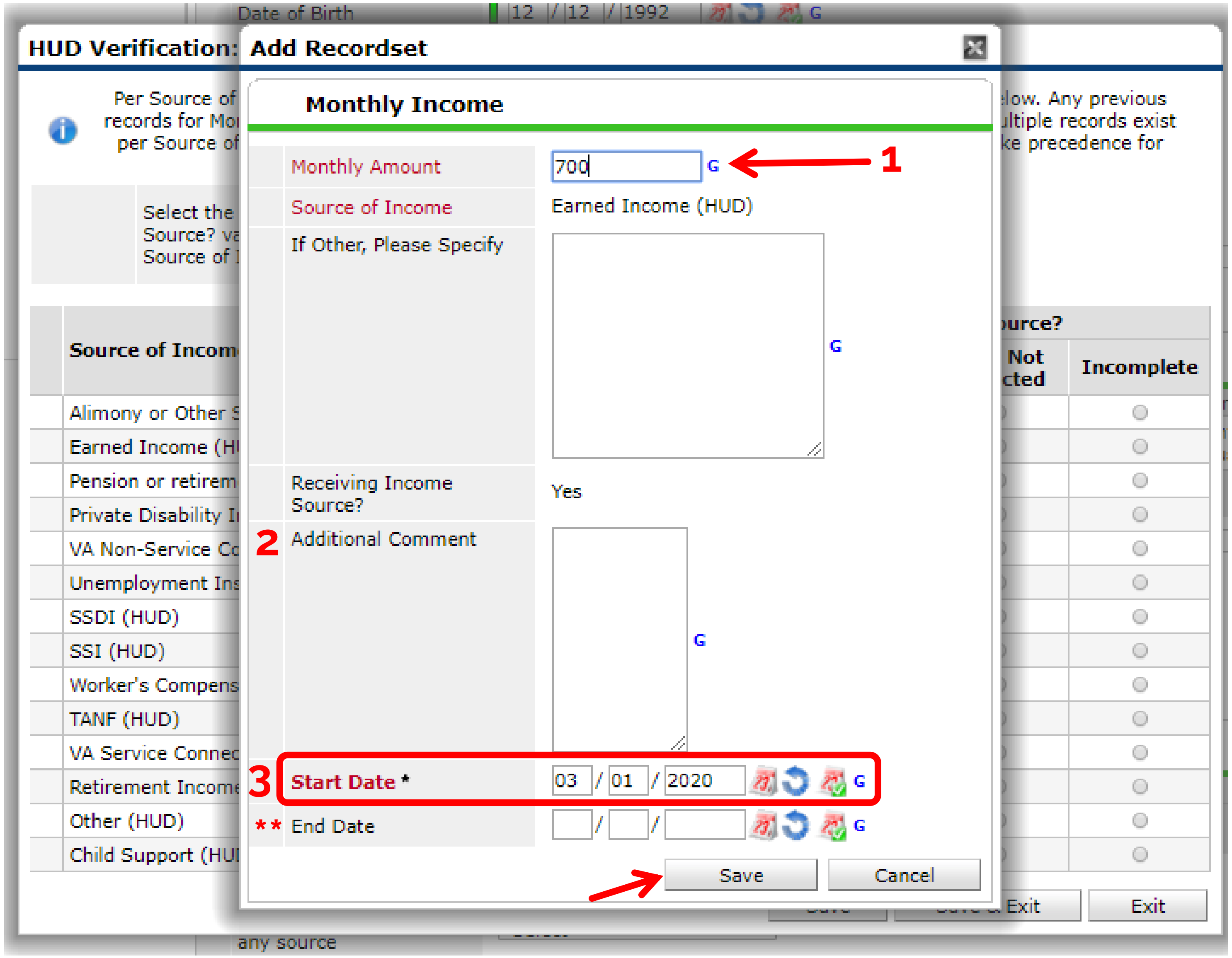
Per Source of Income, the current records for Monthly Income as of 08/27/2018 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 08/27/2018, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Income Source? value for all incomplete Source of Income records

- (●) No
- ( ) Data Not Collected
- ( ) Incomplete

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	○	●	○	○
Earned Income (HUD)	○	●	○	○
Pension or retirement income from another job (HUD)	○	●	○	○
Private Disability Insurance (HUD)	○	●	○	○
VA Non-Service Connected Disability Pension (HUD)	○	●	○	○
Unemployment Insurance (HUD)	○	●	○	○
SSDI (HUD)	○	●	○	○
SSI (HUD)	○	●	○	○
Worker's Compensation (HUD)	○	●	○	○
TANF (HUD)	○	●	○	○
VA Service Connected Disability Compensation (HUD)	○	●	○	○
Retirement Income From Social Security (HUD)	○	●	○	○
Other (HUD)	○	●	○	○
Child Support (HUD)	○	●	○	○

Save | Save & Exit | Exit



ENTRY ASSESSMENTS: YES TO ANY INCOME

1. Key in Monthly Amount
2. Feel free to include any Additional Comments for better tracking
3. The Start Date is when their employment started
   - If no date is given, date of project entry

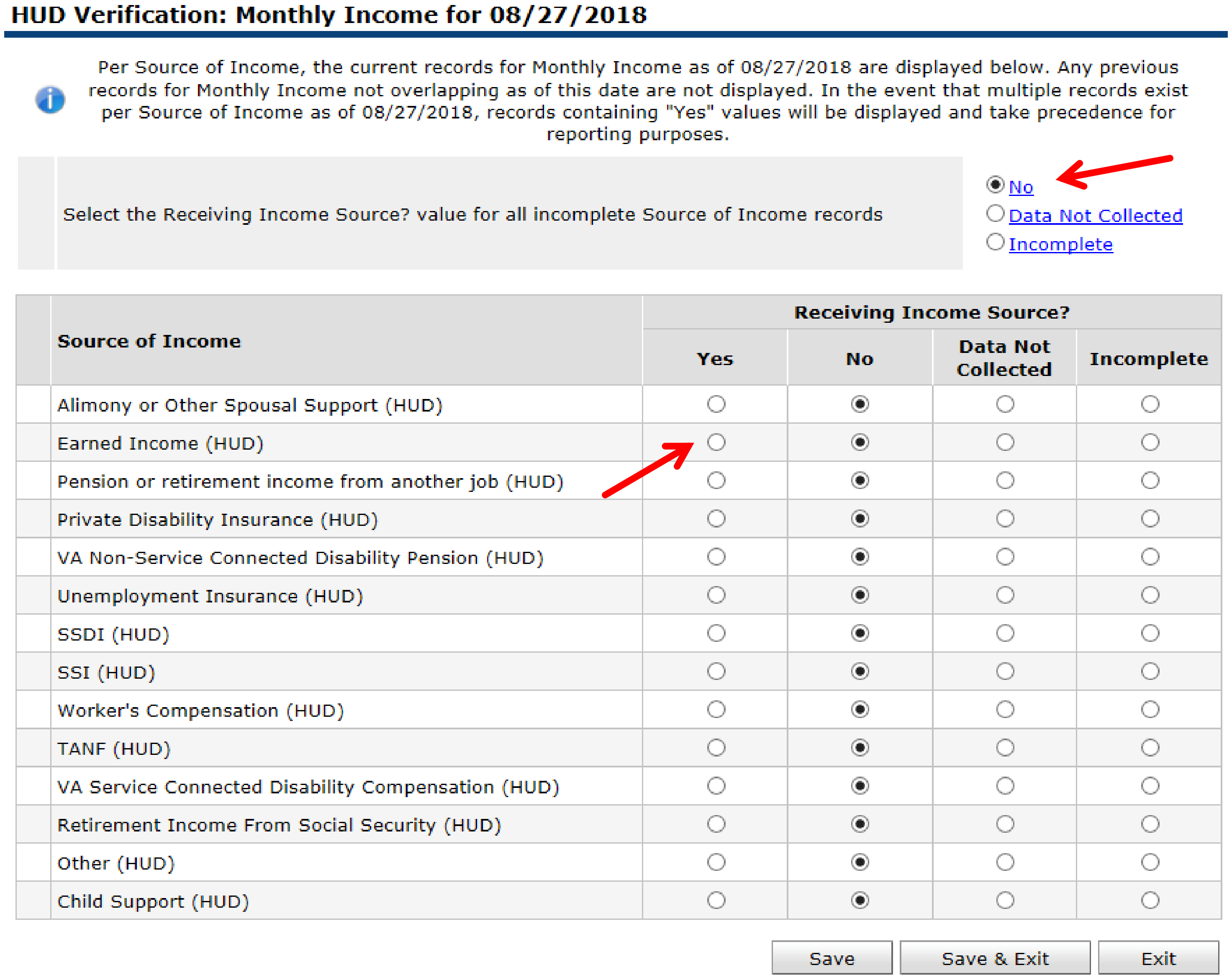
**__NOTE__: When client no longer receives any income, add an End Date instead of deleting the entire record

UPDATING ENTRY ASSESSMENTS

This table needs to match the corresponding Yes/No question.

NOTES:

- Selecting "No" from above will autofill for the entire table
- If any field applies to the client, manually change answer to "yes"
    - For income, a pop-up window will ask for additional data (e.g. amount, notes, starting date)



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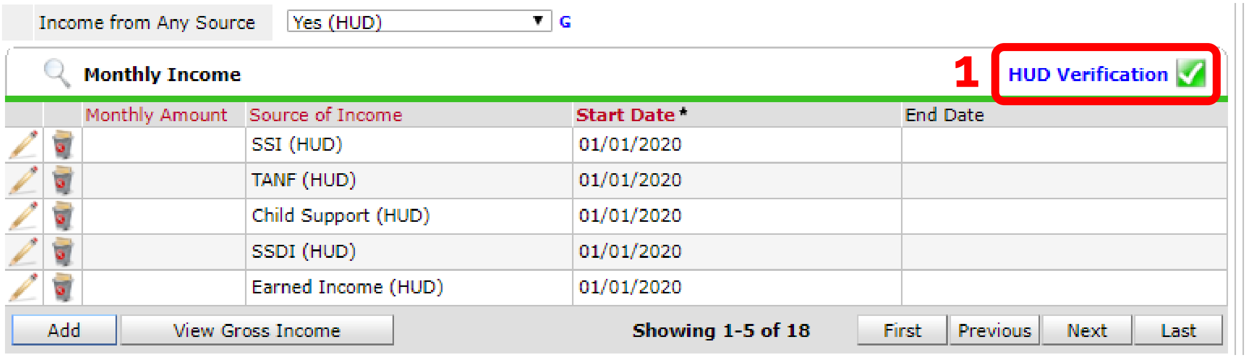
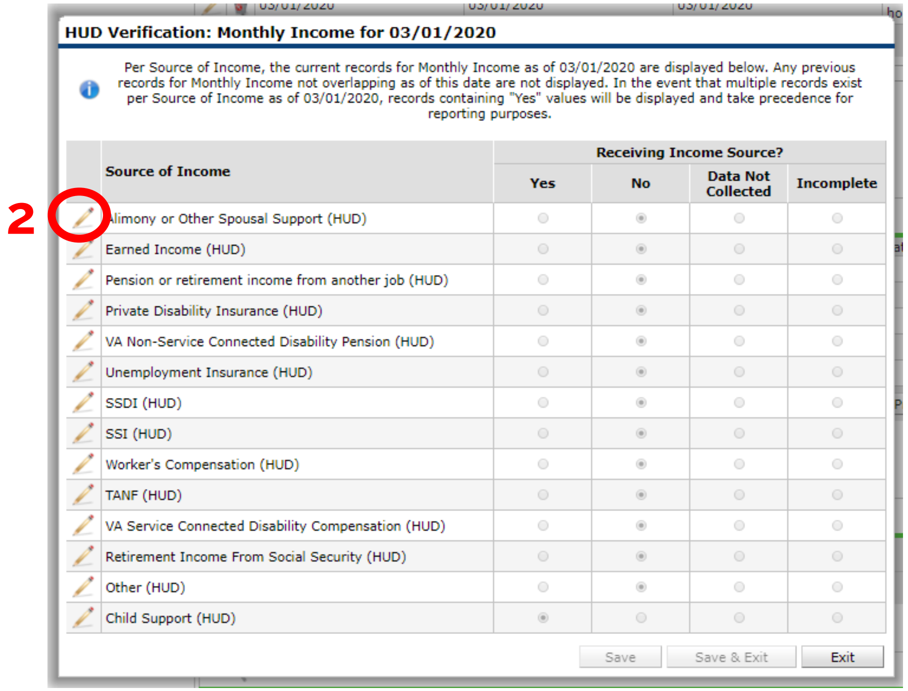
◉ No
○ Data Not Collected
○ Incomplete

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	○	◉	○	○
Earned Income (HUD)	○	◉	○	○
Pension or retirement income from another job (HUD)	○	◉	○	○
Private Disability Insurance (HUD)	○	◉	○	○
VA Non-Service Connected Disability Pension (HUD)	○	◉	○	○
Unemployment Insurance (HUD)	○	◉	○	○
SSDI (HUD)	○	◉	○	○
SSI (HUD)	○	◉	○	○
Worker's Compensation (HUD)	○	◉	○	○
TANF (HUD)	○	◉	○	○
VA Service Connected Disability Compensation (HUD)	○	◉	○	○
Retirement Income From Social Security (HUD)	○	◉	○	○
Other (HUD)	○	◉	○	○
Child Support (HUD)	○	◉	○	○

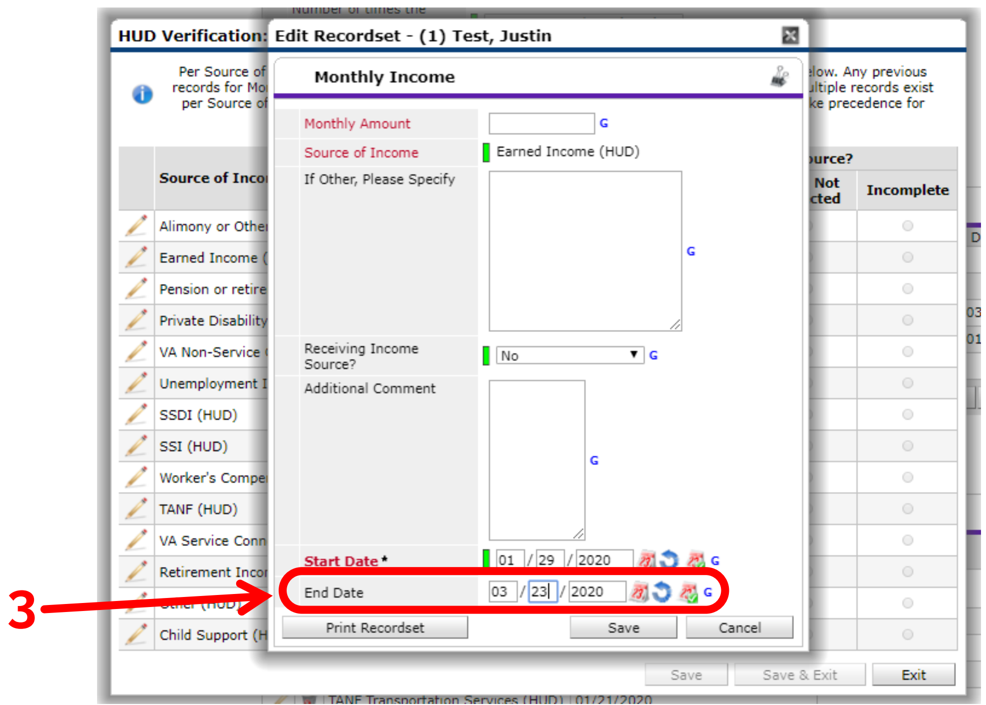
Save | Save & Exit | Exit

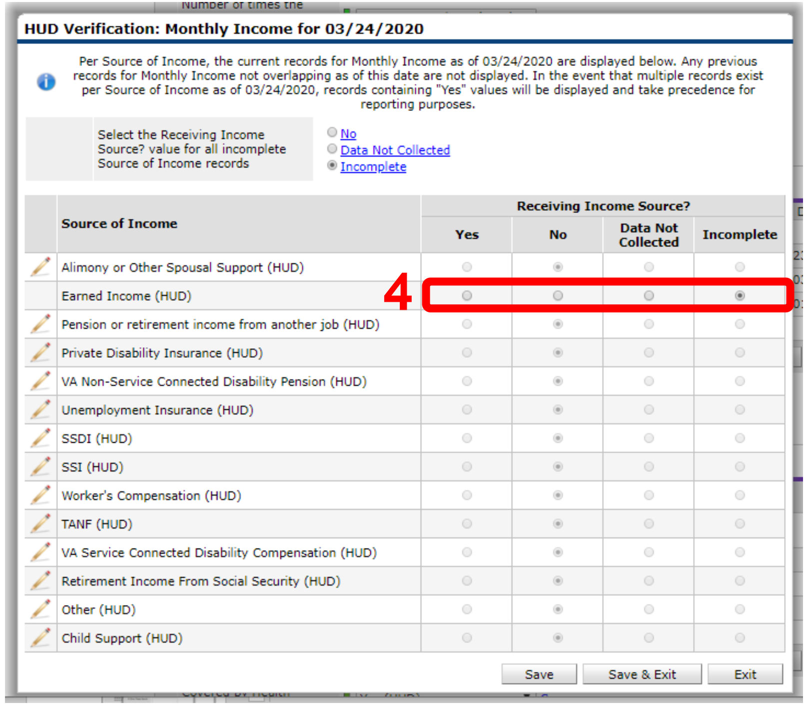
UPDATING SUB-ASSESSMENTS

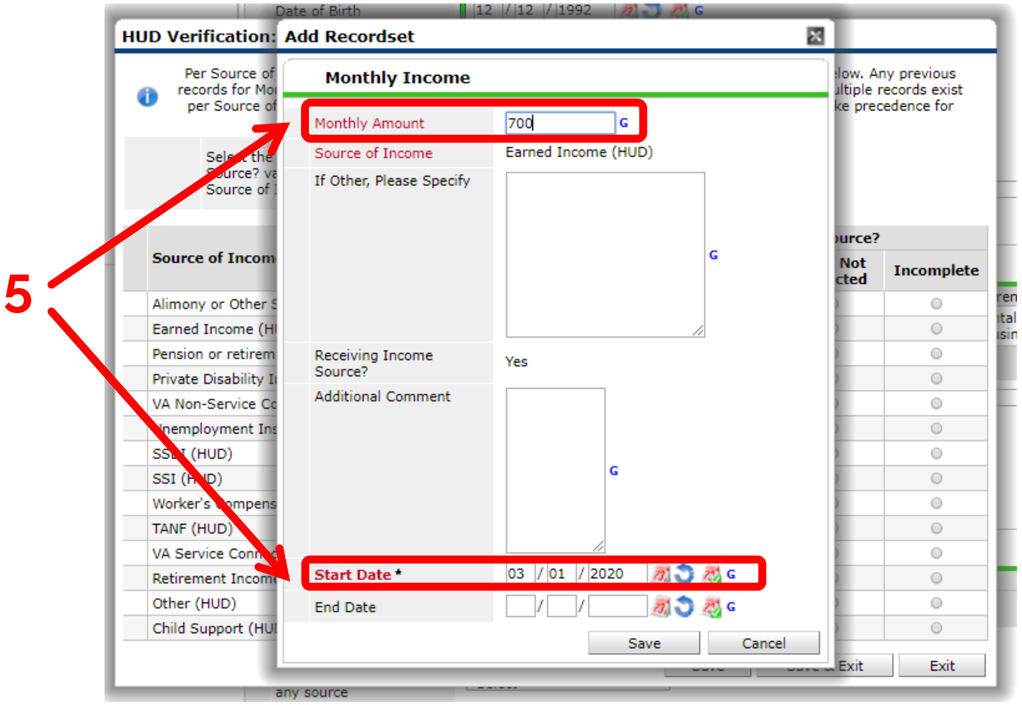




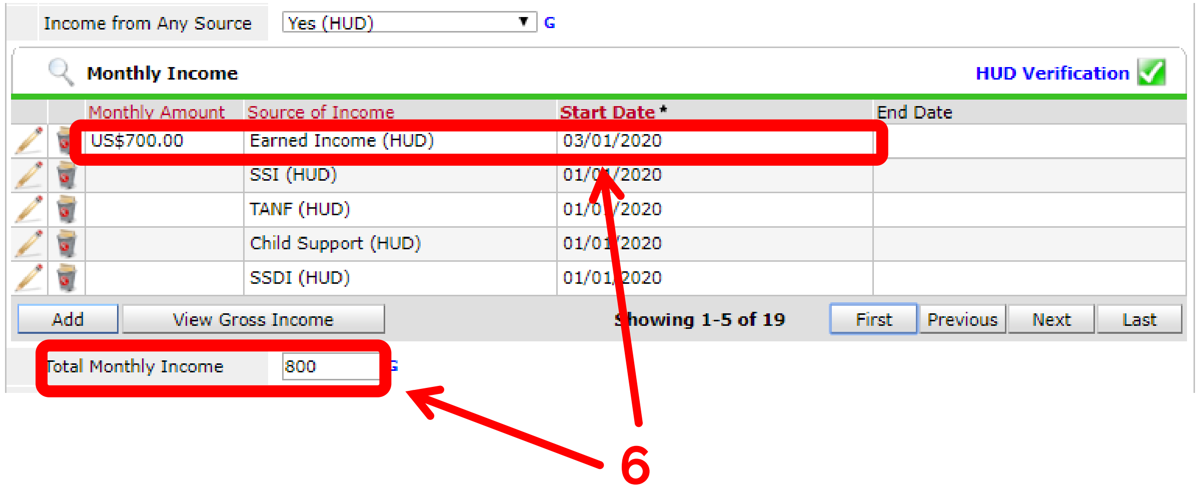
1. If there is previous information saved, click on HUD Verification to update any sub-assessment
   - Applies to Income, Non-cash benefits, Insurance, Disability
2. Ensure this reflects the client's information *upon entry*. To make changes, click on the pencil icon for any applicable source
3. Add an End Date
   - If no specific end date was provided, use *day prior to entry*
   - This will close out the previous entry record
   - This step is important before adding any new entry

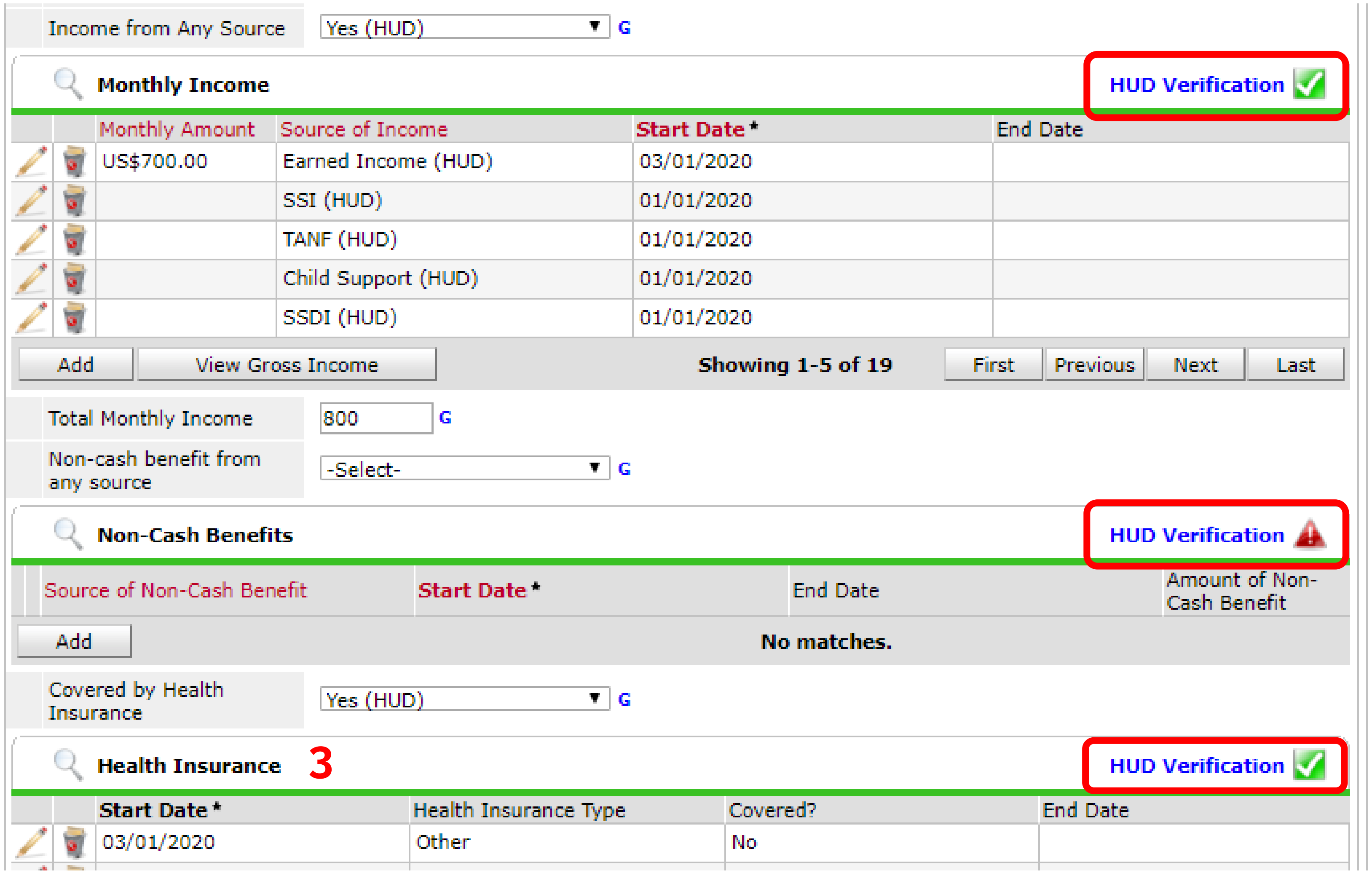






4. A line item should now be Incomplete after closing out a previous entry record.
   - Now, select the applicable answer
5. If Yes is selected, add the new monthly income and new start date
   - Click Save
6. A new entry will be reflected on the table
   - If it was a new income, remember to also update the Total Monthly Income field





HOW TO ENSURE HUD VERIFICATION IS COMPLETE

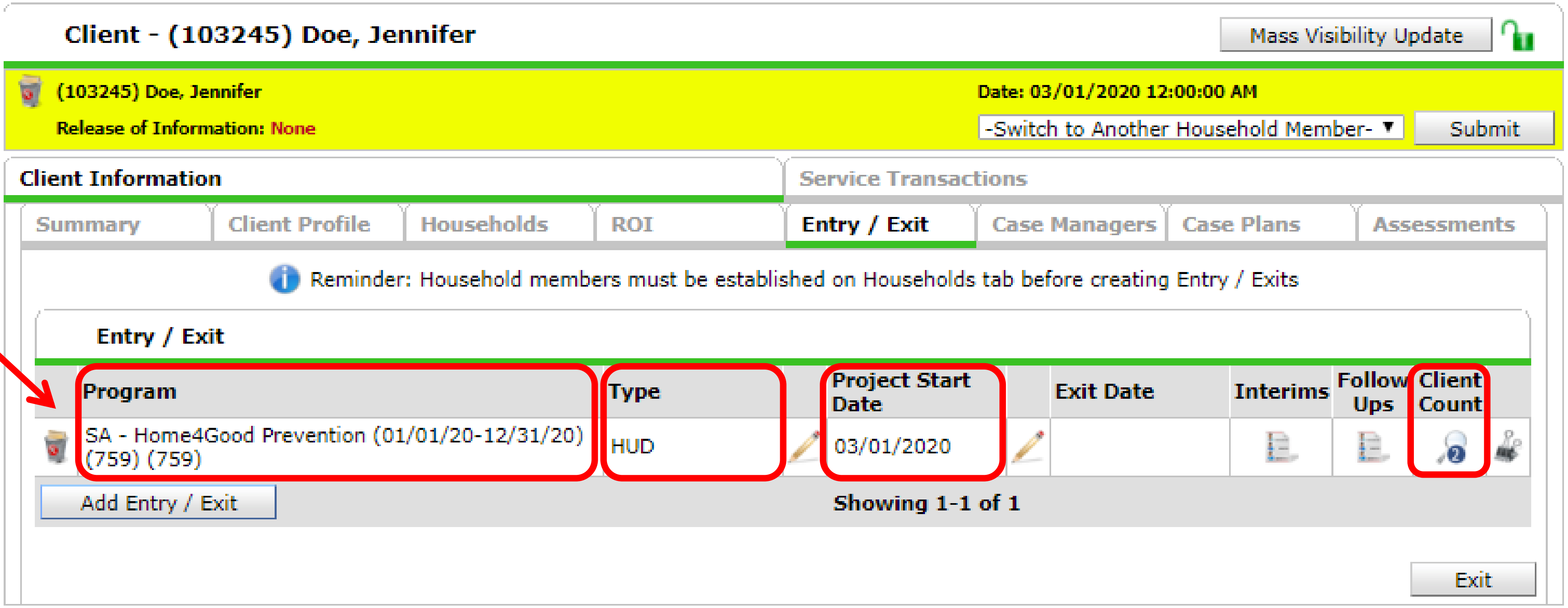
The icon beside HUD Verification should now be a green check mark.

Once every question and sub-assessment has been updated *for each household member* (including children), click on Save and Exit.

WHAT A FINISHED PROJECT ENTRY LOOKS LIKE

Check the following:

- Program is the specific project
- Entry Date is accurate
- Type is HUD, unless trained otherwise
- Client Count is correct



ADDING CLIENT UPDATES

UPDATING CLIENTS' FILES AFTER PROJECT ENTRY/BEFORE PROJECT EXIT

1. CASE MANAGERS*
2. CASE PLANS*
3. SERVICE TRANSACTIONS

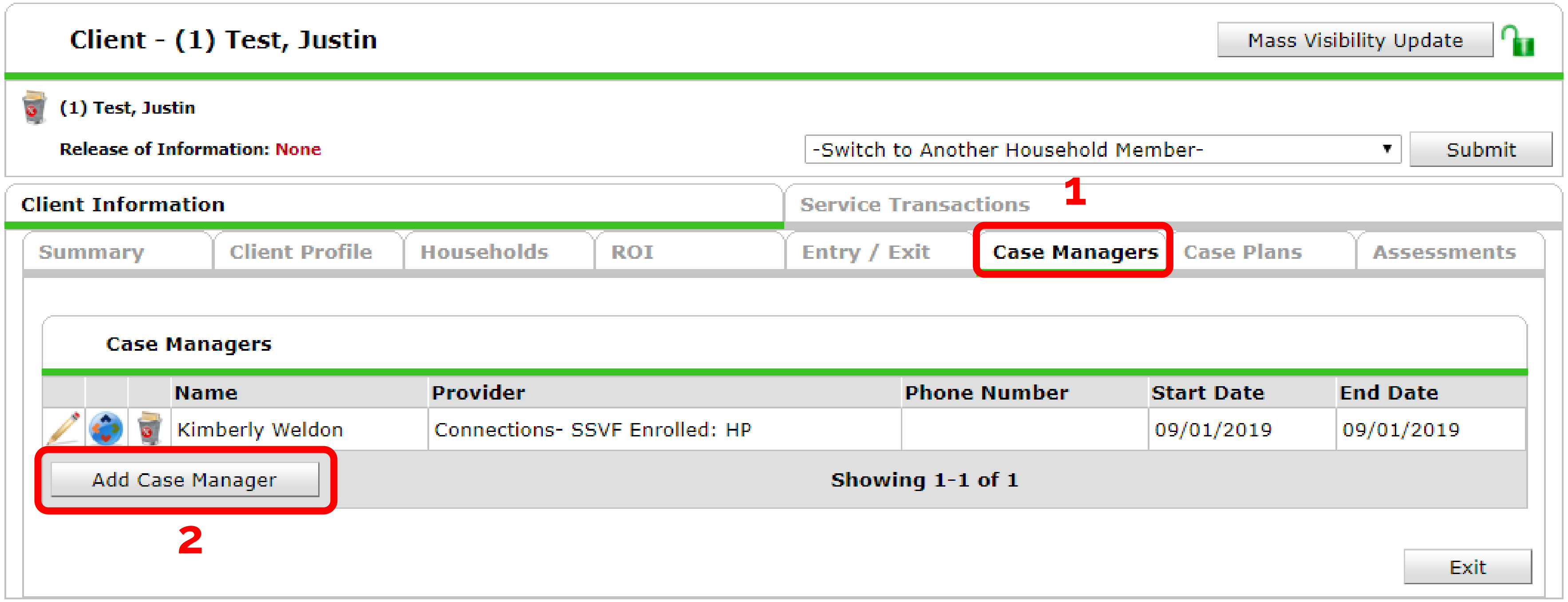
*OPTIONAL

HOW TO ADD CASE MANAGERS

1. On client information, navigate to the **Case Managers** tab.

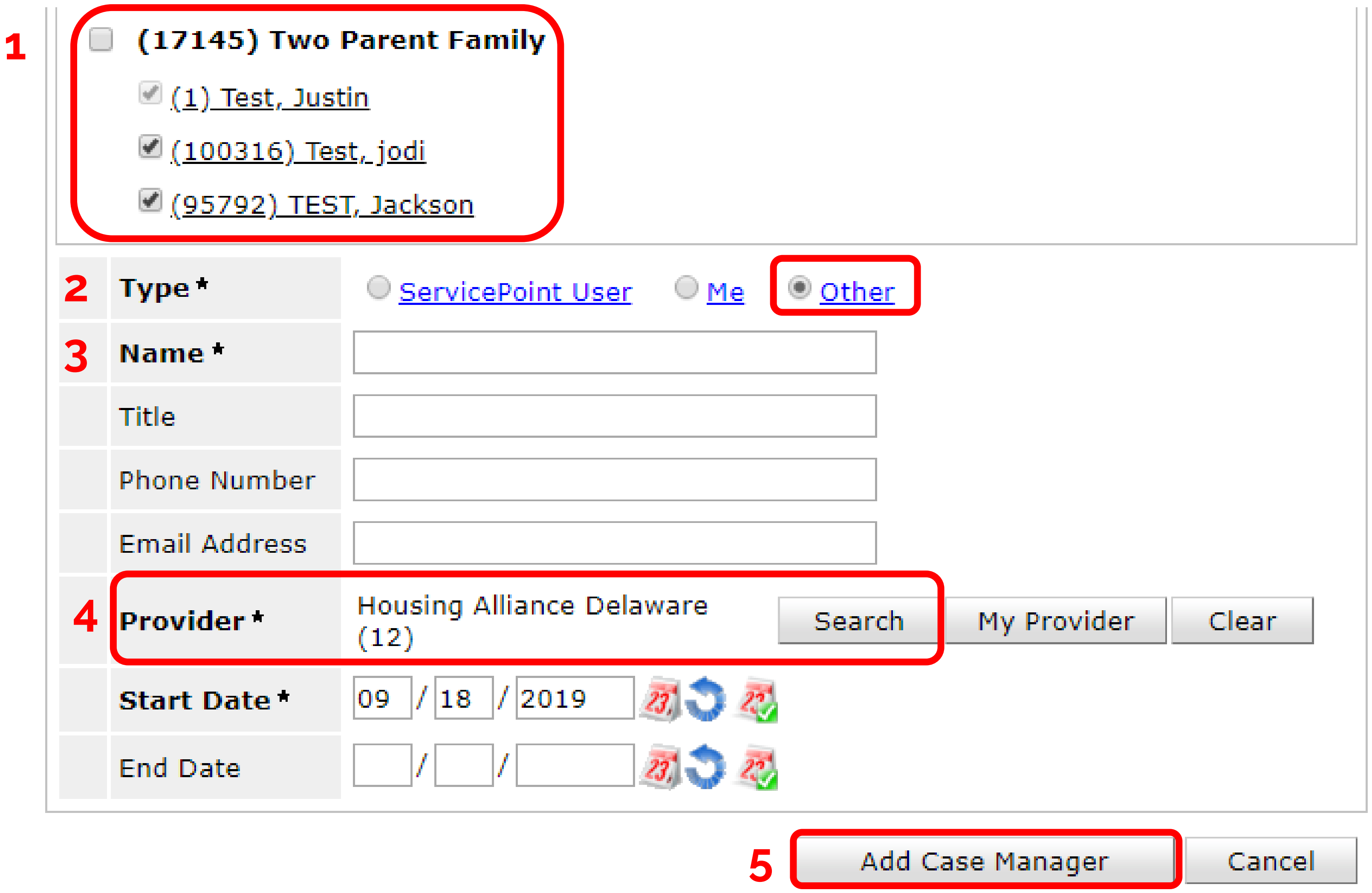
2. To add information, select **Add Case Manager**.

PURPOSE: To ensure that clients get ongoing assistance, especially for housing, even if they change providers.



ADDING A CASE MANAGER

1. Select the household members working with the Case Manager
2. Select “Other” for Type
3. Fill out information
4. Select Provider
   - If case manager is from a different organization, click on search
5. Click Add Case Managers



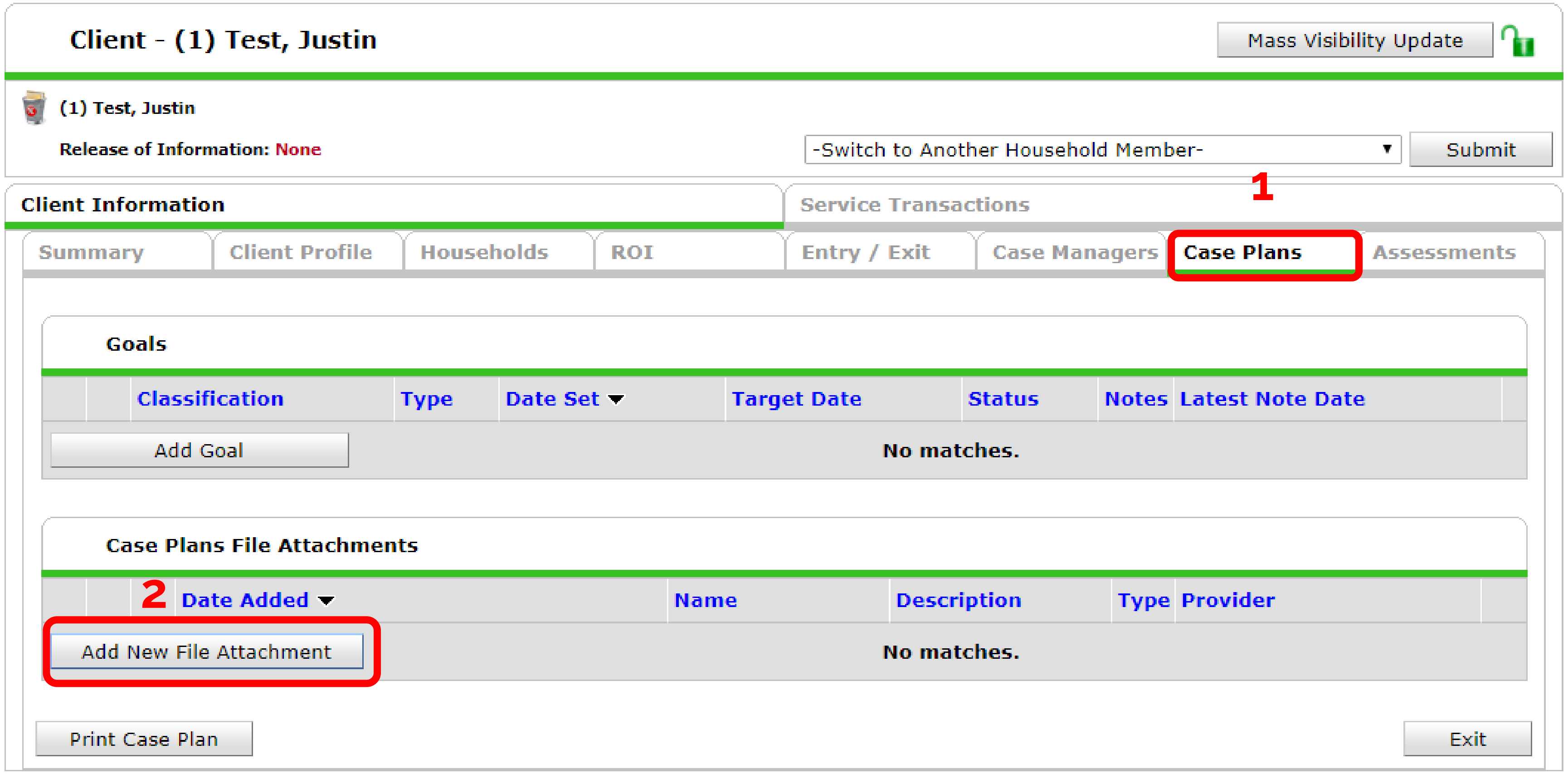
HOW TO ADD CASE PLANS

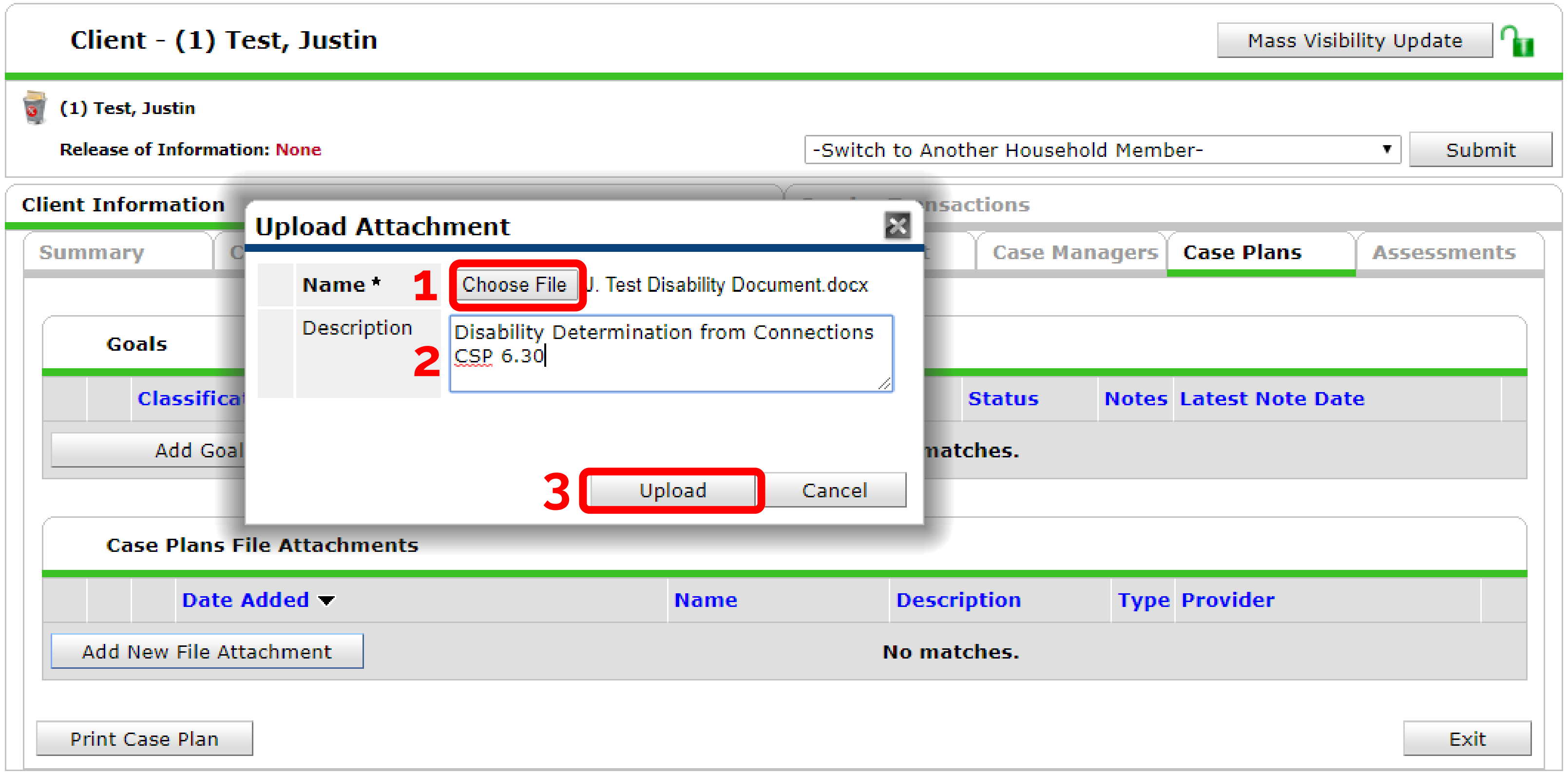
1. On client information, navigate to the **Case Plans** tab.

2. To upload documents related to client's case management, select **Add New File Attachment**.

Examples of helpful documents:

- Copy of Photo ID
- Copy of Social Security Card (for client and children)
- Disability Determination document(s)
- Length of Time of Homelessness document(s)





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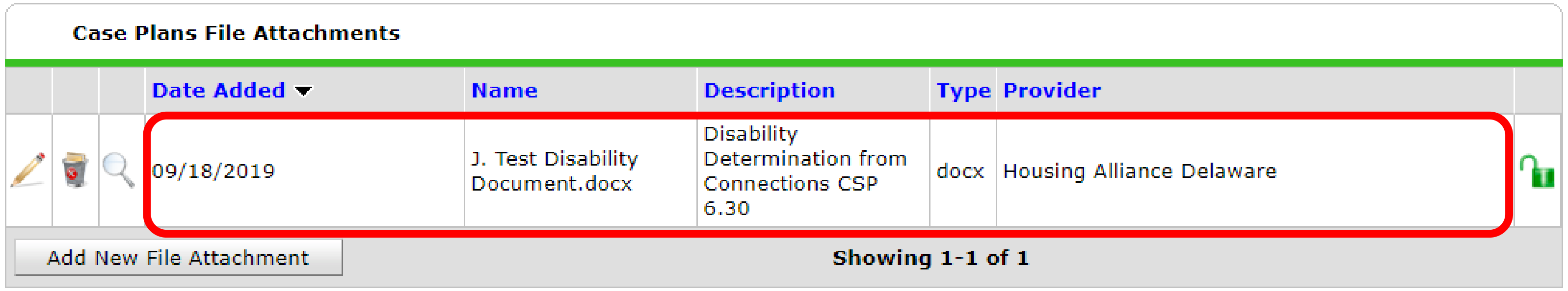


UPLOADING CASE PLANS

1. Click on Choose File
2. Write brief description
3. Click on Upload
4. This is how a finished upload looks like
   - To review or make any edits, click the pencil icon
   - This is also accessible at the bottom of the Client's Profile tab

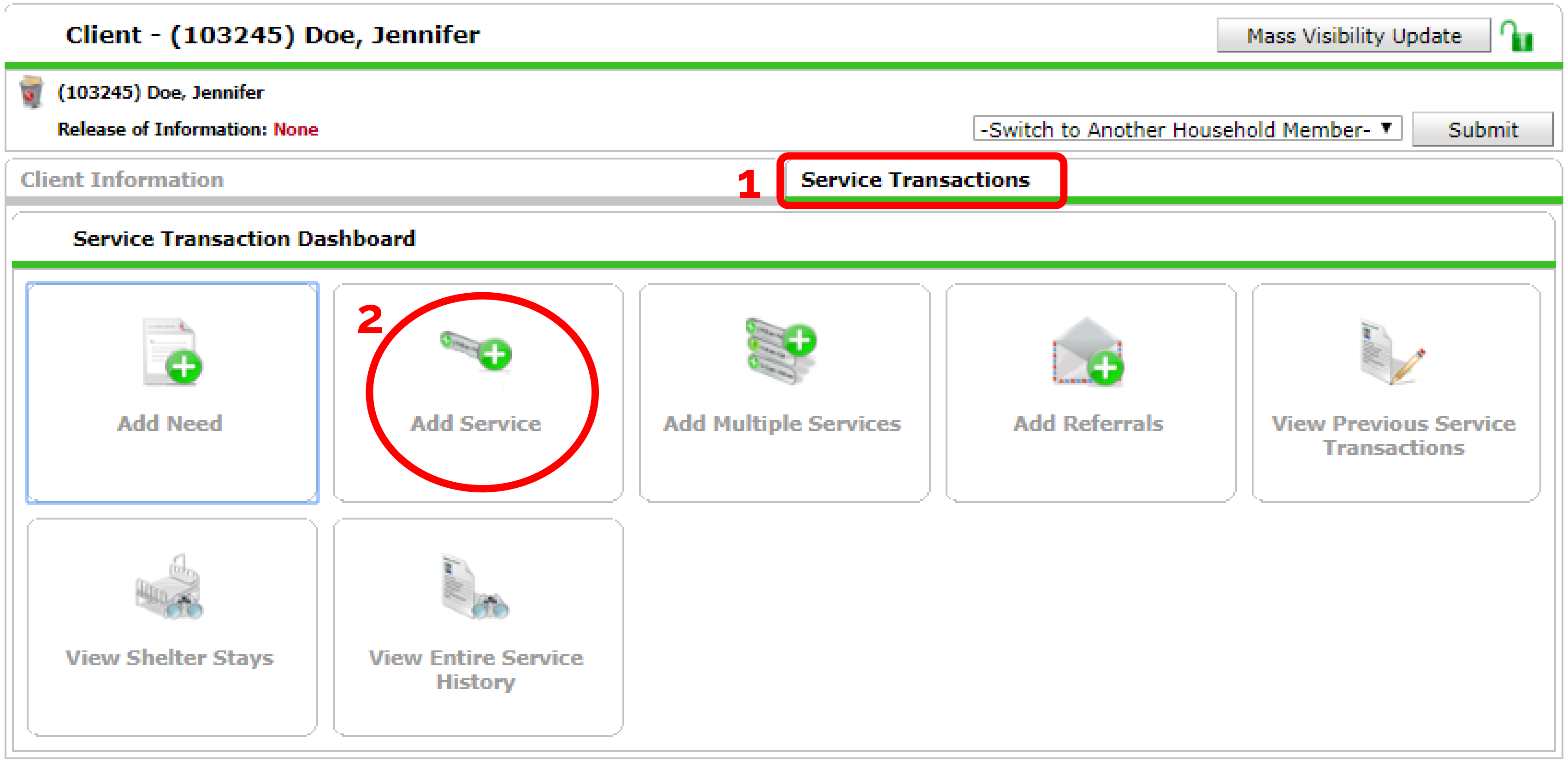
HOW TO ADD SERVICE TRANSACTIONS

Often used by:

- **Rapid Re-Housing**
- **Diversion**
- **Homelessness Prevention**

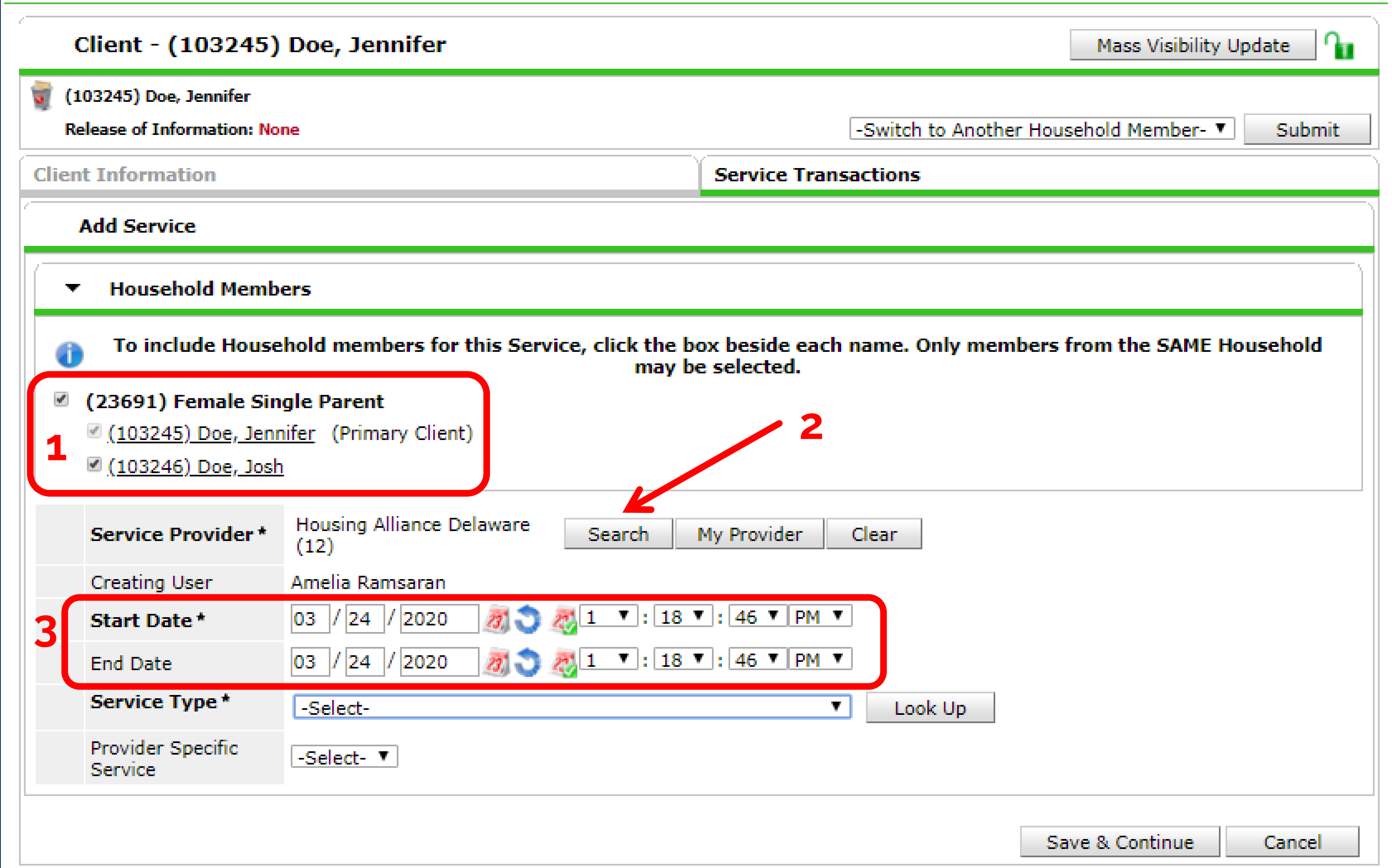
1. On client's file, navigate to the **Service Transactions** tab.

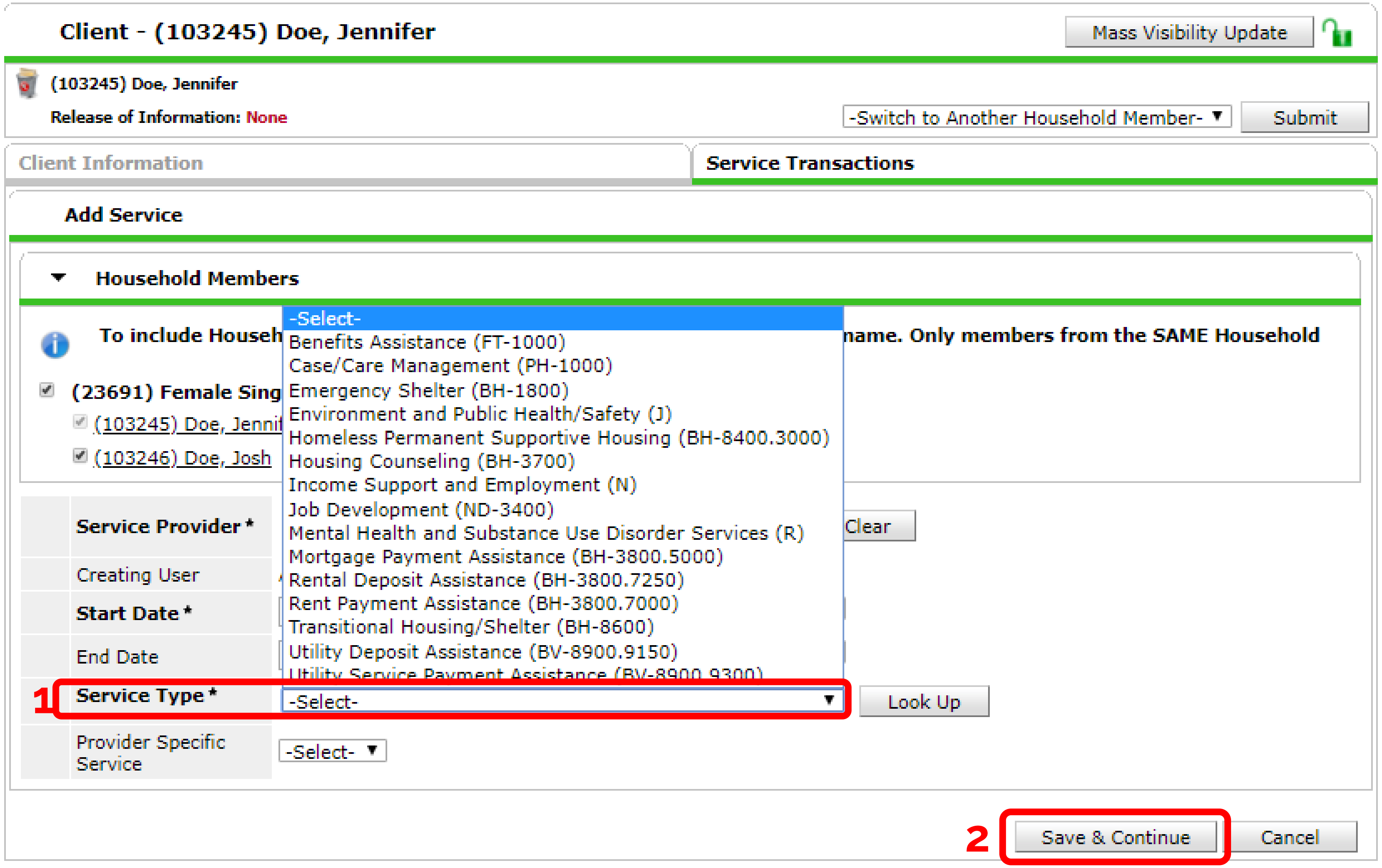
2. To record a new service, select **Add Service**.



ADDING A SERVICE TRANSACTION

1. Select the household members working with the Case Manager
2. Select specific Service Provider
3. If not in Back Date Mode, adjust Start and End Date



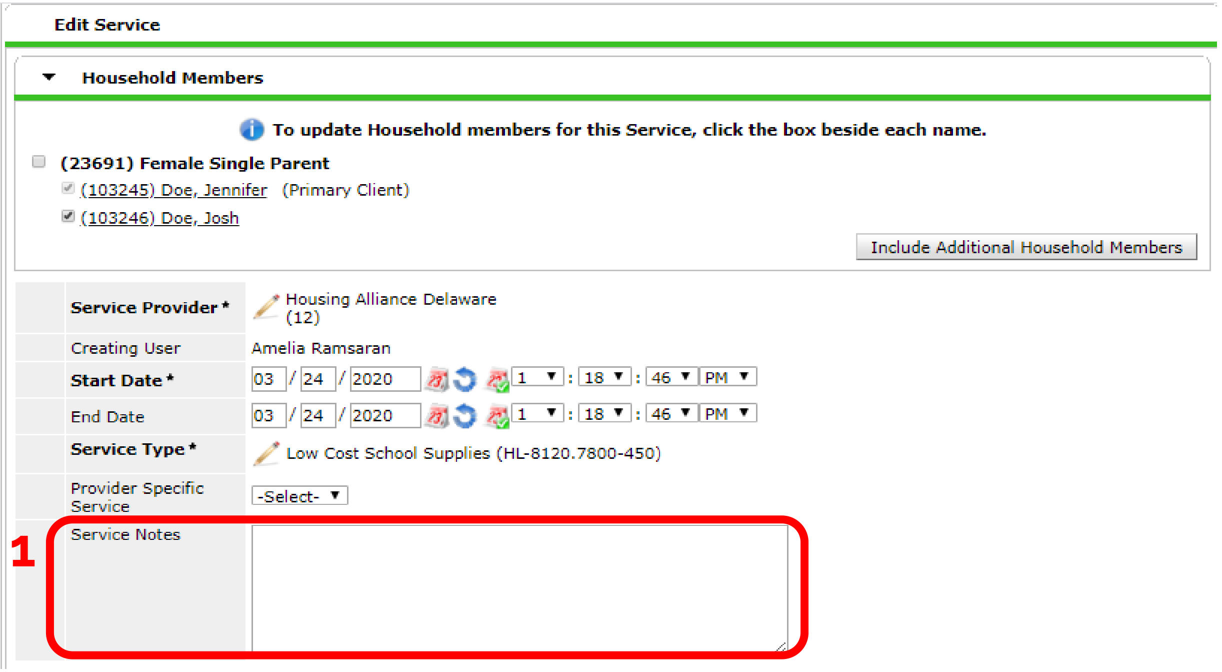


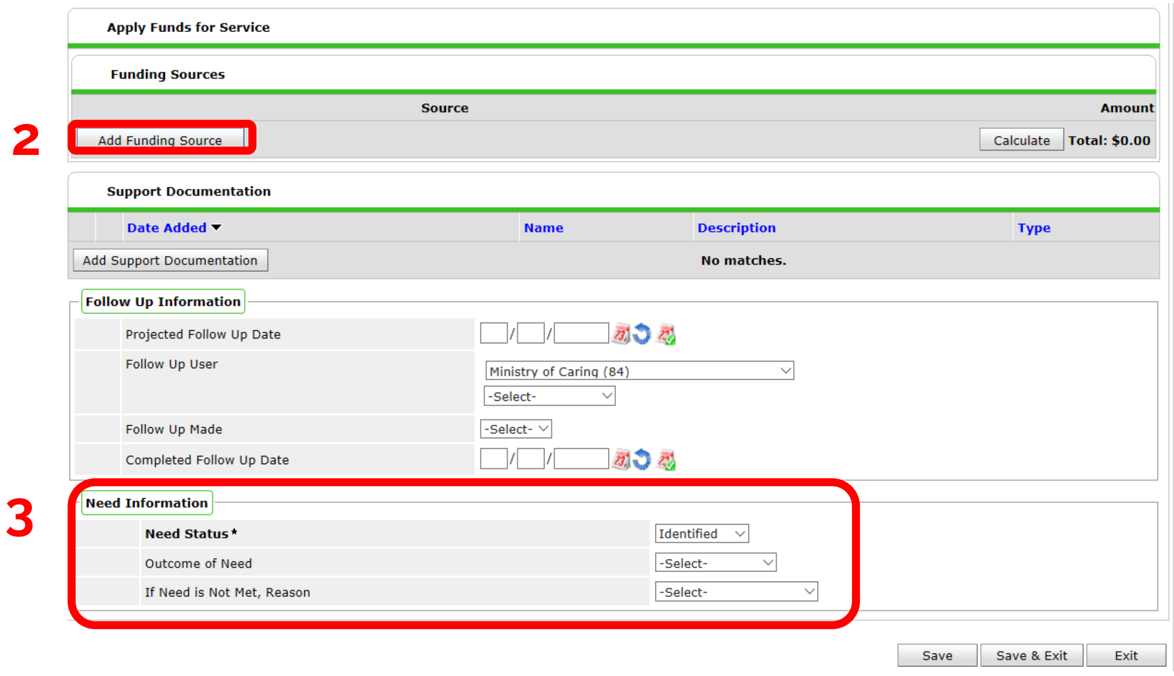
ADDING A SERVICE TRANSACTION

1. Select applicable Service Type
   - Options will differ by project/provider
2. Click on Save & Continue

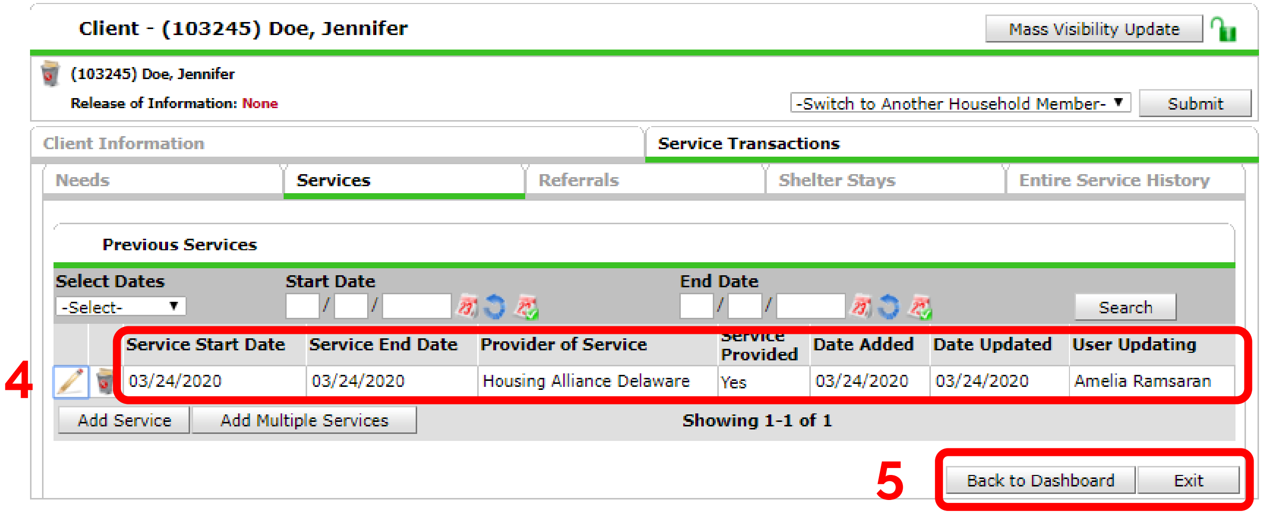
NOTE: If the service type you need is not listed:

- Change Service Provider to your parent provider
- Request the CMIS team through cmis.support@housingalliancede.org to update your options





1. Add Services Notes
   - Required by some funders such as SSVF
2. Click on Add Funding Source
   - Required by some funders, such as DSHA
   - It will also ask for the amount used
3. Update the Need Status and Outcome of Need
4. This is how a completed Service Transaction looks
   - To edit, click on the pencil icon
5. Click on Exit or Back to Dashboard



WHEN TO ADD AN INTERIMS-UPDATE

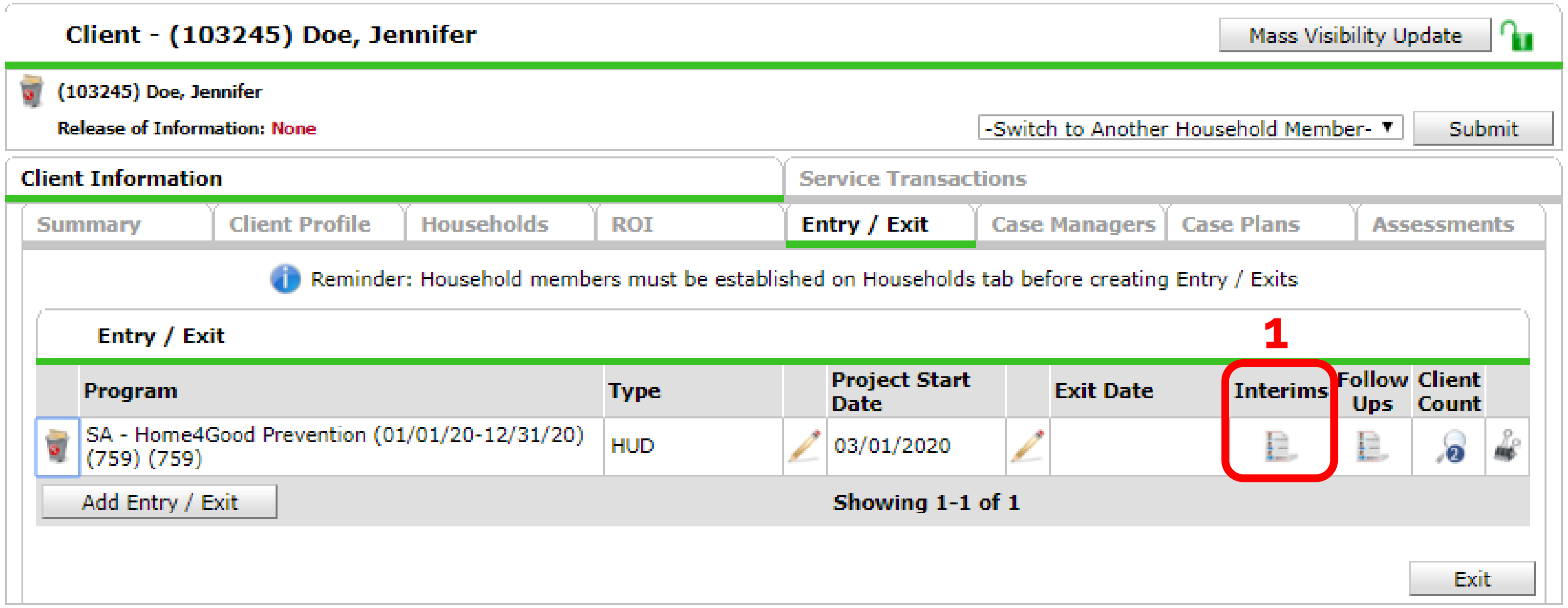
For each life change in any of the following categories:

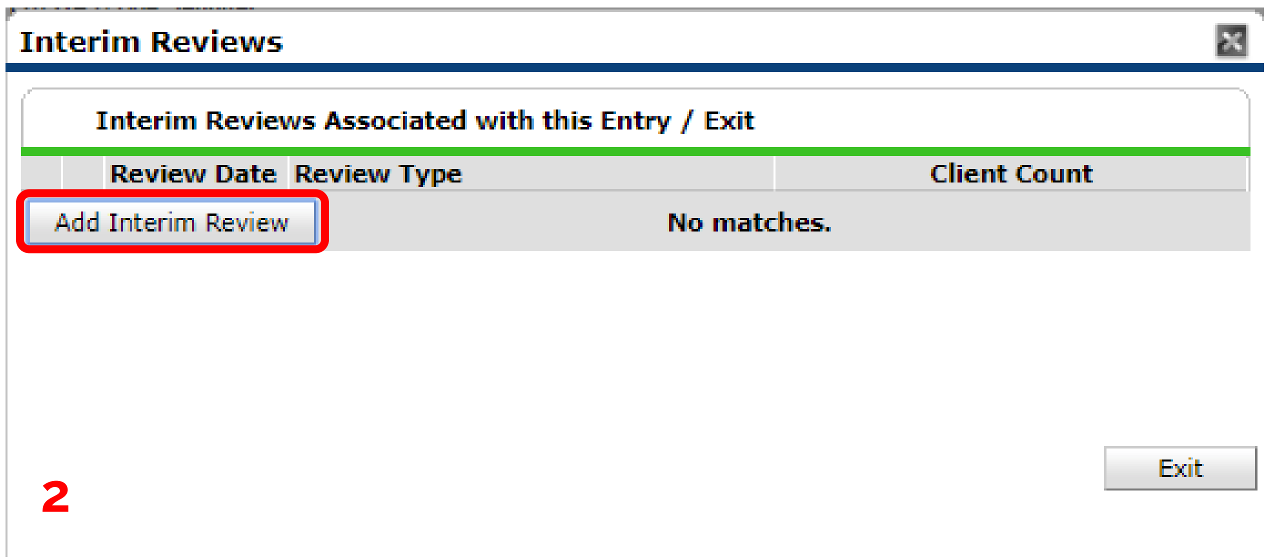
- Income
- Benefits
- Health insurance
- Housing Move-In Date (RRH/PSH)
- Self reports in health (PSH)
- PATH status (PATH)

Where to locate it:

1. On client's Entry/Exit tab, click on **Interims**

Next steps are on the next slide.





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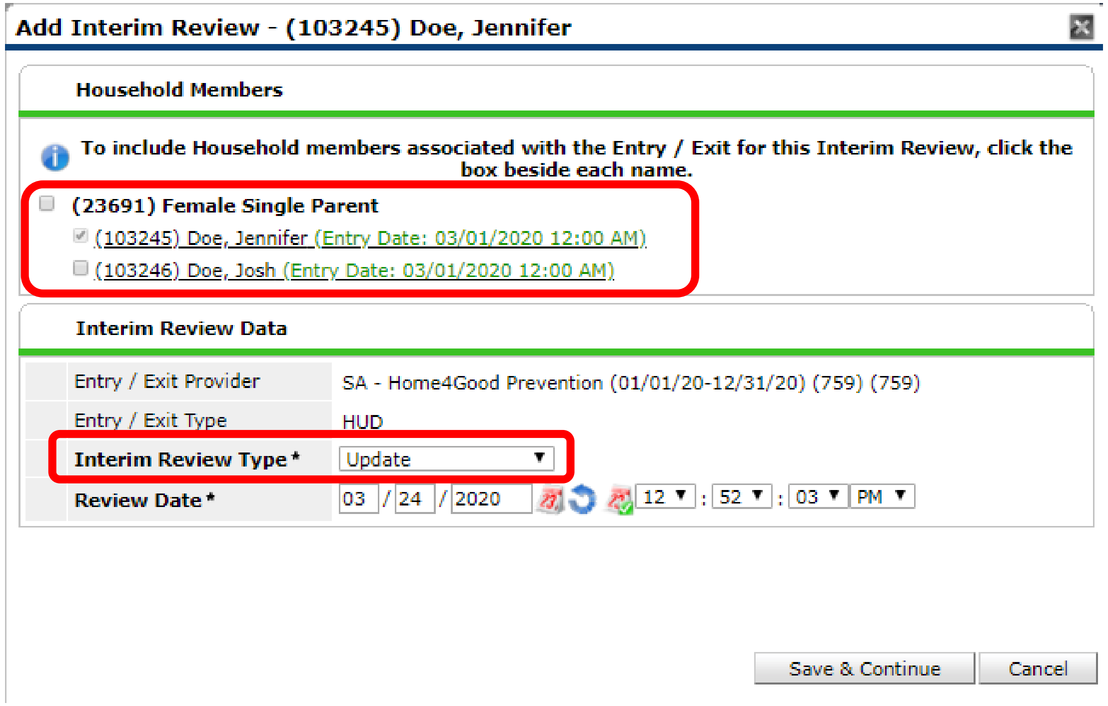
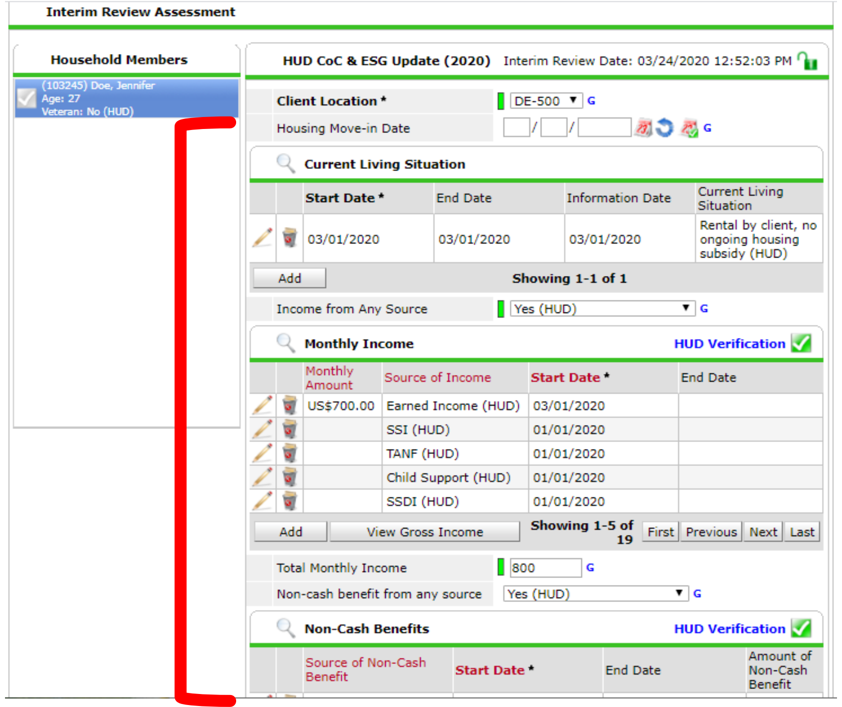


3

2. **Click on Add Interim Review**
3. **Confirm details**
   - Select all concerned household members
   - Select Interim Review Type - Update
   - Reflect when change occurred on Review Date
     - No need to use Back Date Mode
   - Save & Continue
4. **Make the necessary changes**
   - Housing Move-in Date
   - PATH Status updates
   - Income/ Non-cash benefits/ Insurance/ Disabling Condition



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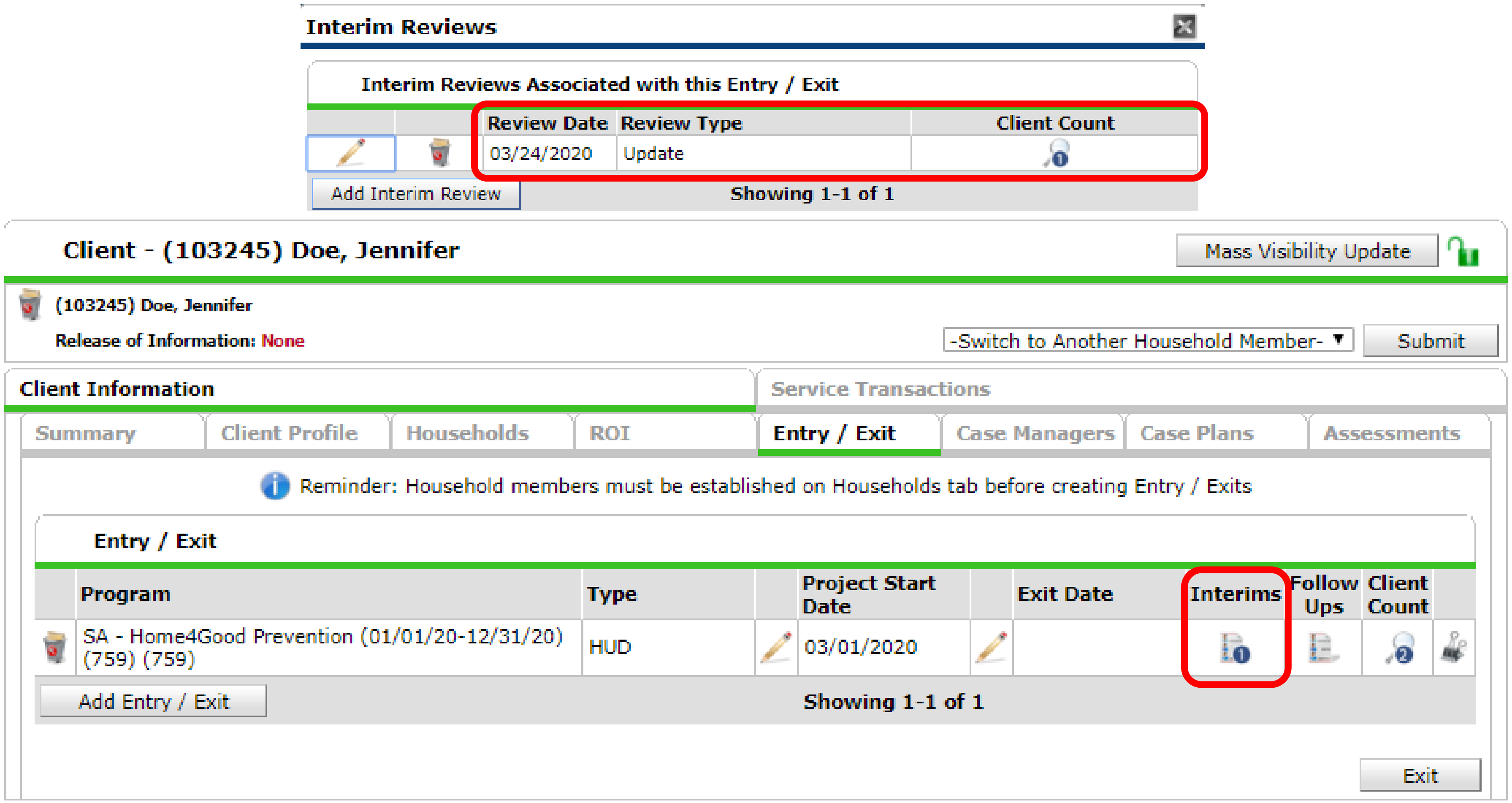
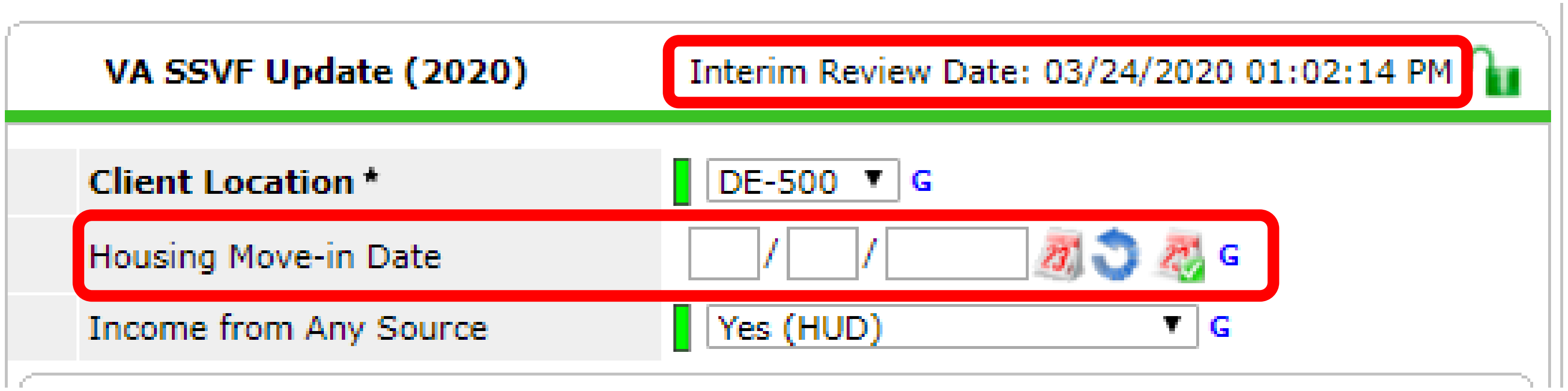
WHAT A COMPLETED INTERIM-UPDATE LOOKS LIKE



ADDING A HOUSING MOVE-IN DATE

NOTES:

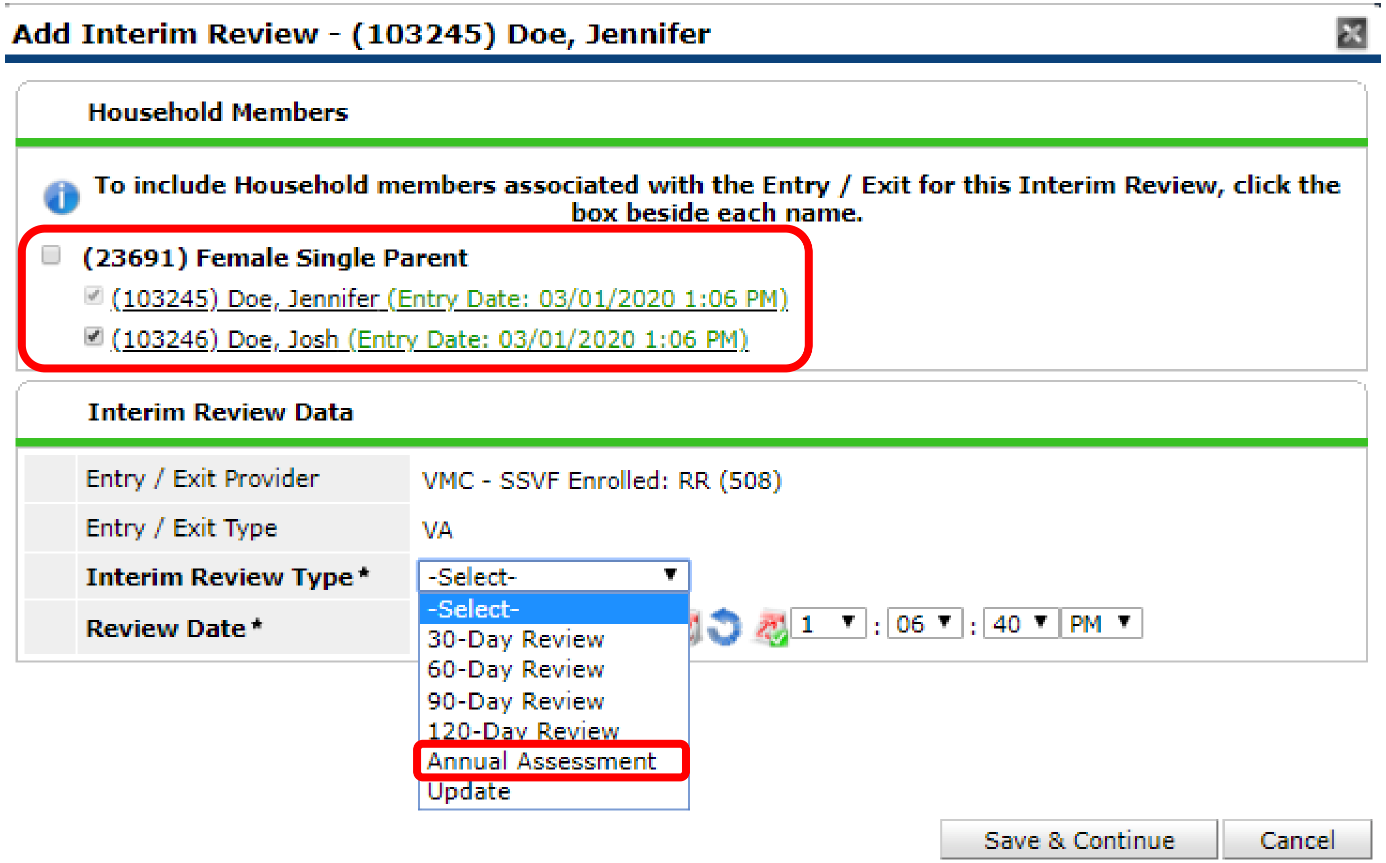
- Add HMID when RRH or PSH client ***physically* moves into their housing unit**
  - Repeat this step for each household member
- Add **through an Interim-Update**
  - *Not* on the entry assessment – keep this blank
  - **Entry date = intake date**
    - It is possible that intake and move-in date are the same



ADDING AN ANNUAL ASSESSMENT

Notes:

- This is required **when clients stay in a project for 365+ days**
- Add **30 days before or after their anniversary**
- Select **Interim Review Type: Annual Assessment**
- Reflect **any life changes**
    - Income,
    - Non-cash benefits,
    - Insurance,
    - Disabling Condition

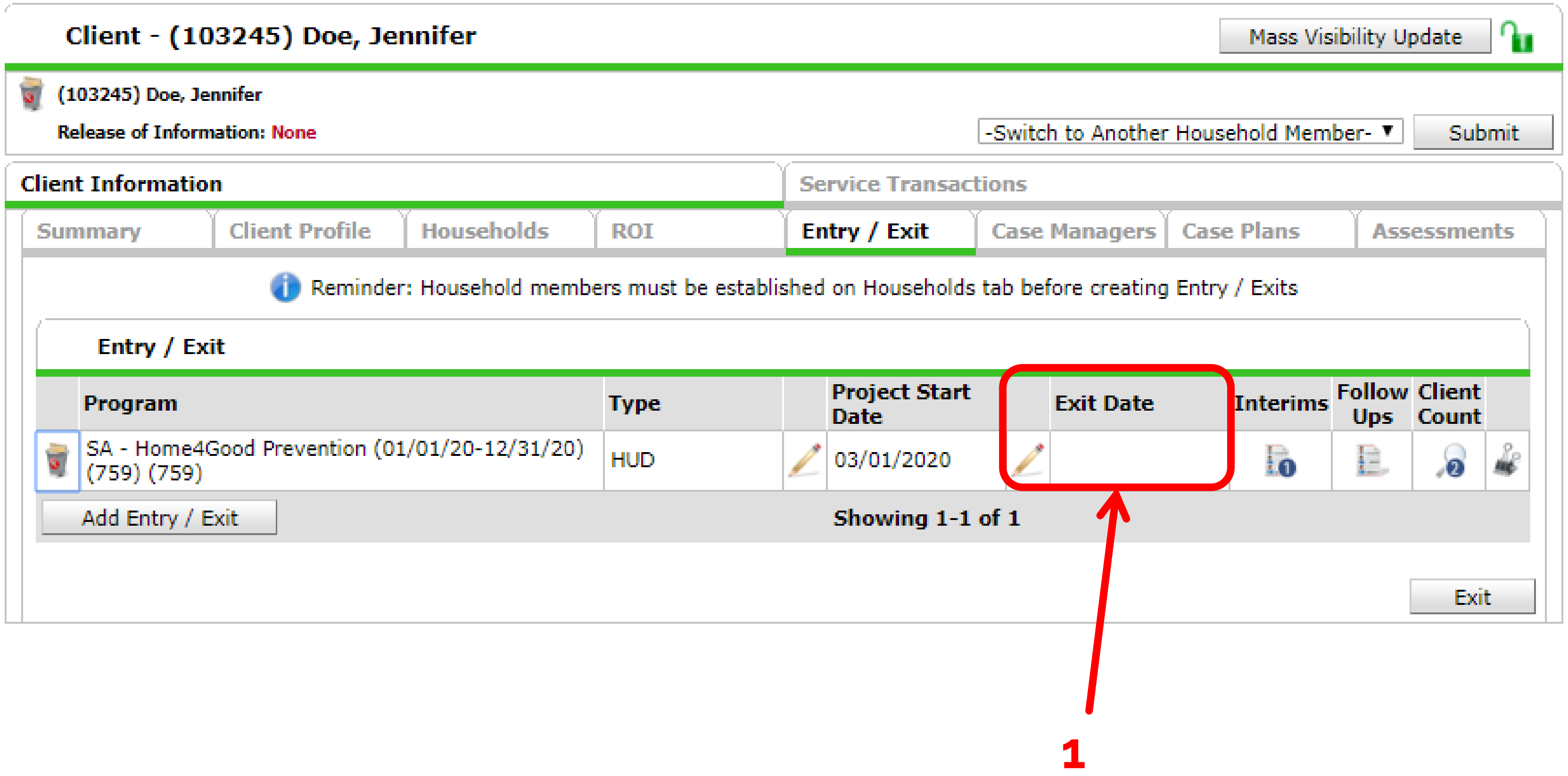


ADDING A PROJECT EXIT

HOW TO ADD A PROJECT EXIT

NOTES:

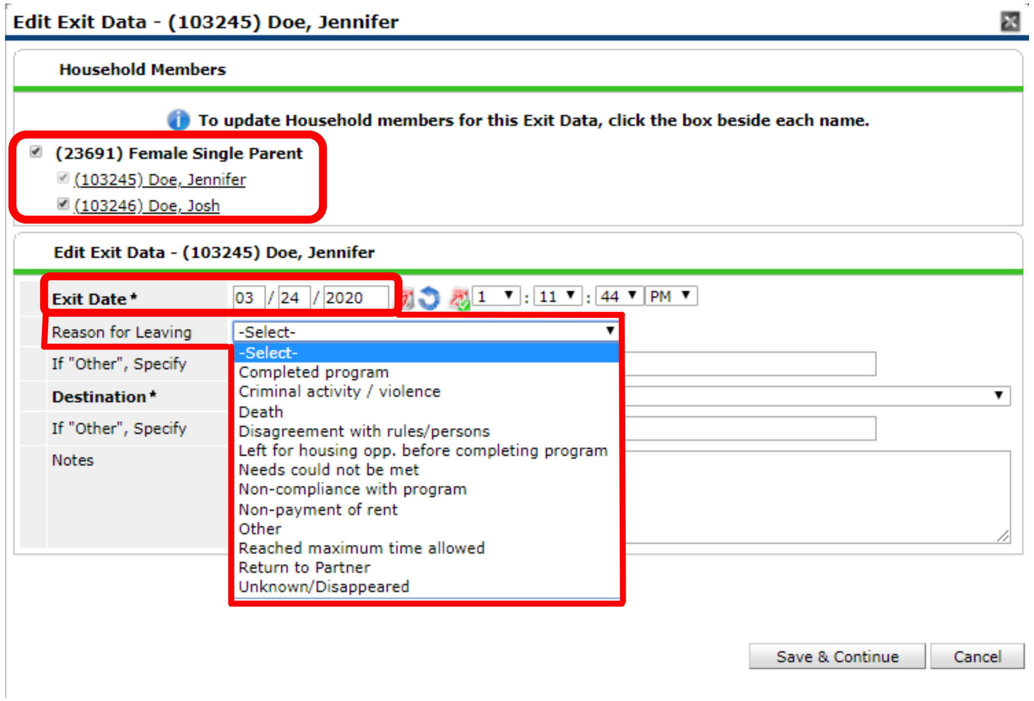
- When a client is **no longer active** in the program, they must be exited in CMIS
- Based on CoC guidelines, the project exit should be added **within three business days** of it happening



Where to locate it:

1. On client's Entry/Exit tab, click on **Pencil Icon next to Exit Date**.

Next steps are on the next slide.



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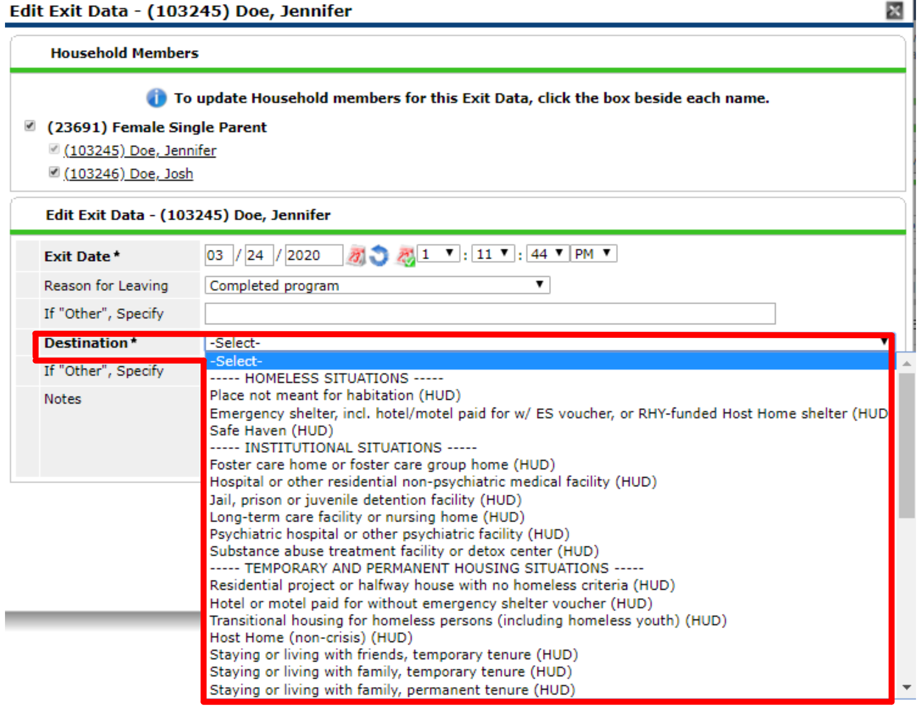
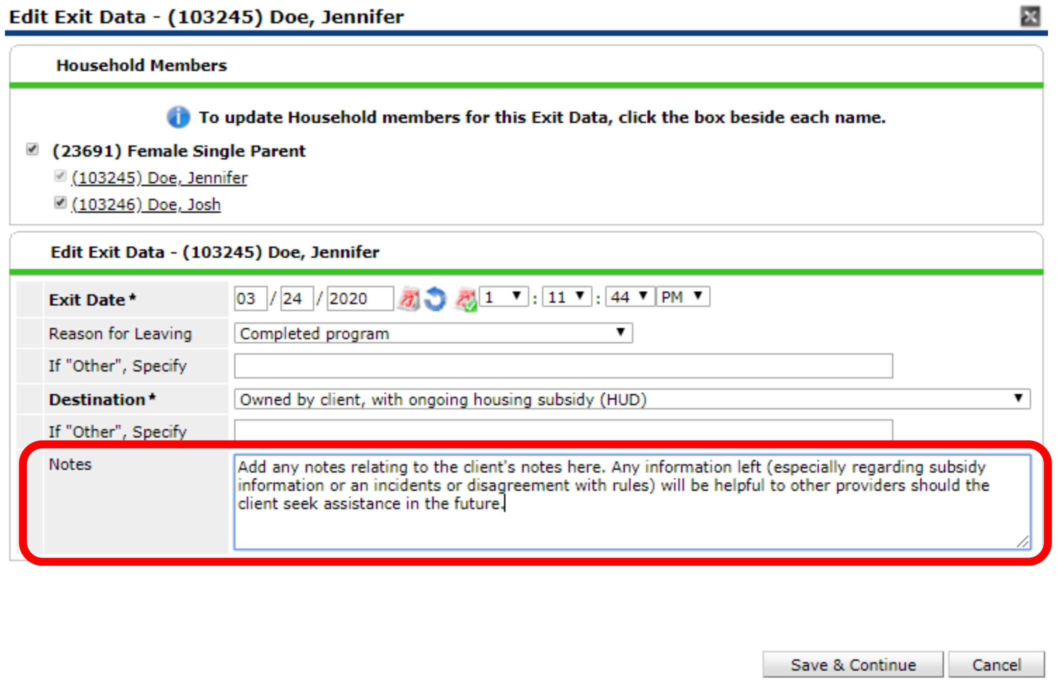


3

2. **Confirm details**
   - Select all concerned household members
   - Reflect when client left on Exit Date
   - Select Reason for Leaving
3. **Select Destination**
   - What is the client's living situation upon project exit?
4. **Add Notes**
   - Once complete, click Save & Continue



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UPDATING THE EXIT ASSESSMENT

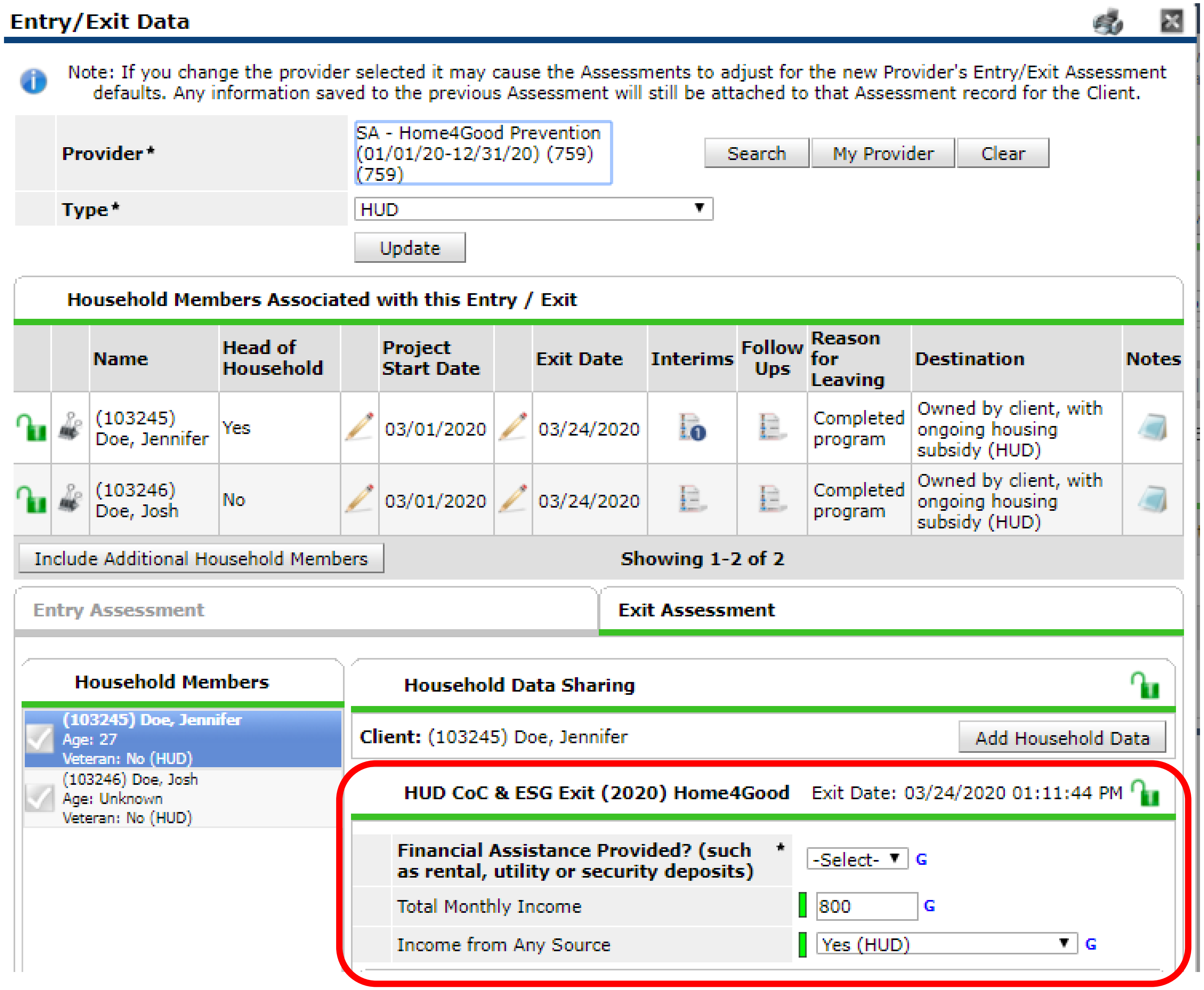
Upon exit, **update applicable information for *each* household member**

- Income
- Non-cash benefits
- Insurance
- Disabling Condition

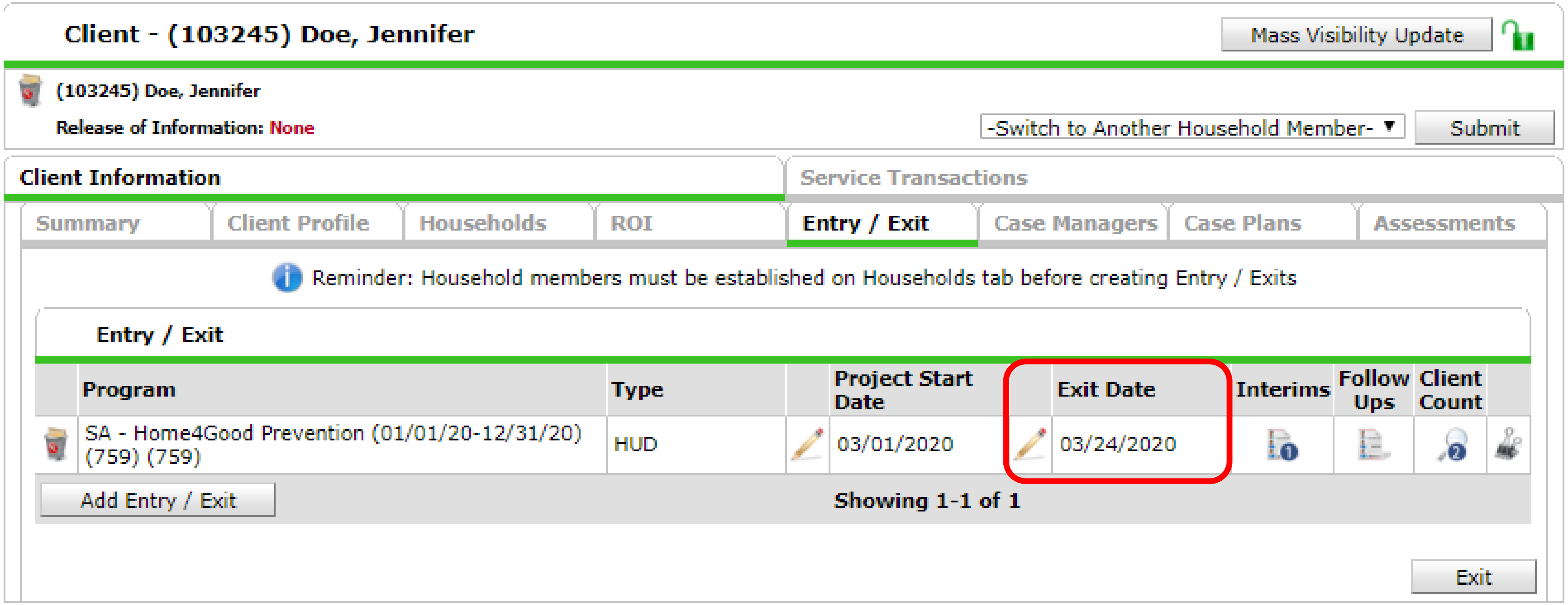
Some additional information is requested of certain program types

- Diversion
- PSH

Save & Exit when finished



WHAT A COMPLETED PROJECT EXIT LOOKS LIKE



HOUSING ALLIANCE DELAWARE

THIS CONCLUDES THE CLIENTPOINT TRAINING POWERPOINT.

FOR ANY QUESTIONS OR REQUEST FOR GUIDANCE, PLEASE CONTACT HOUSING ALLIANCE DELAWARE AT CMIS.SUPPORT@HOUSINGALLIANCEDE.ORG.