

CLIENTPOINT

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HOUSING
ALLIANCE
DELAWARE

TRAINING OVERVIEW

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

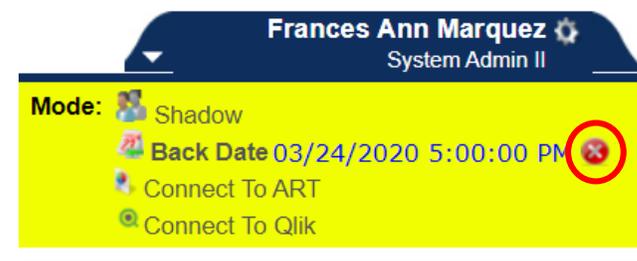
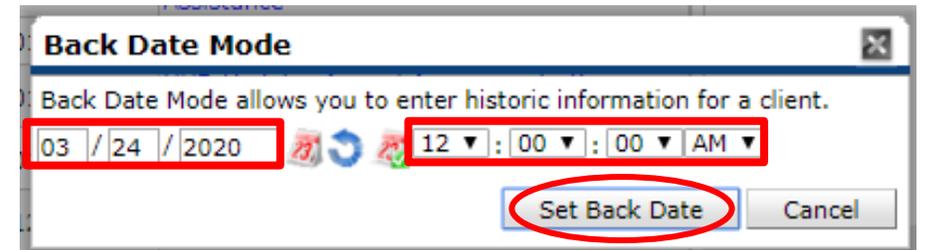
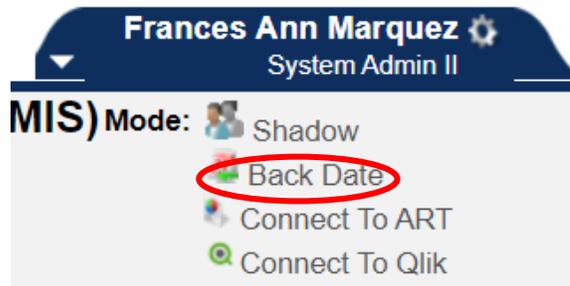
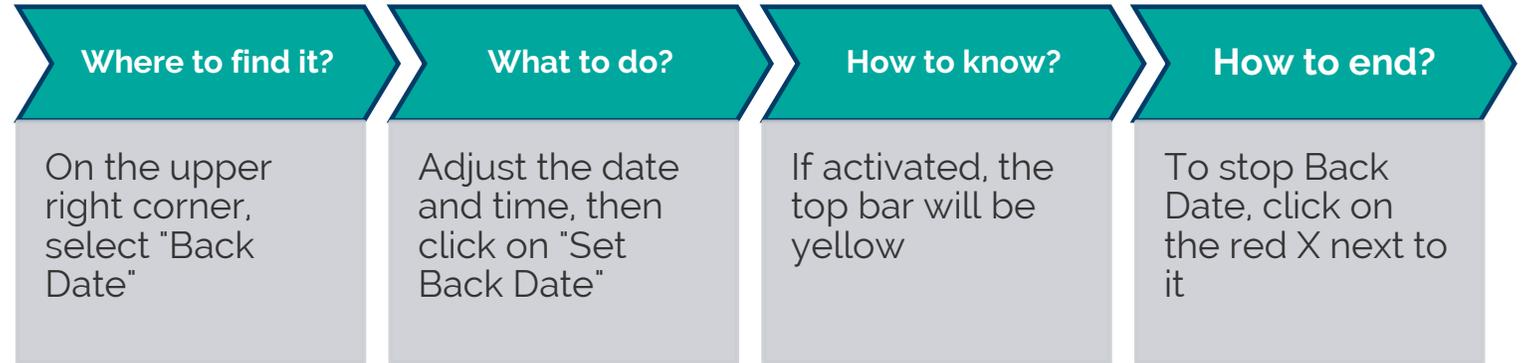
1. Emergency Shelter (large or congregate only)
2. Rapid Re-Housing
3. Permanent Supportive Housing (scattered site)
4. Homeless Prevention
5. Diversion
6. Service Only

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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



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 #

ClientPoint > Client Search Type here for Global Search

Client Search

Please Search the System before adding a New Client.

Name	First	Middle	Last	Suffix
	pet		par	
Name Data Quality	-Select-			
Alias				
Social Security Number	- - -			
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	<input type="checkbox"/>			

Search Clear Add New Client With This Information Add Anonymous Client

Client Number

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

Client ID # Submit

Client Results

ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
1	Parker, Peter	--1234	08/16/2001				0

Showing 1-1 of 1

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@housingalliance.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.**

Client Search

Please Search the System before adding a New Client.

Name: First Middle Last Suffix

Name Data Quality:

Alias:

Social Security Number: - -

Social Security Number Data Quality:

U.S. Military Veteran?:

Exact Match:

Search ACTIVE Clients:

Search INACTIVE / DELETED Clients:

Search ALL Clients:

Buttons: Search, Clear, **Add New Client With This Information**, Add Anonymous Client

Client Number

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

Client ID #: Submit

Client Results

ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
No matches.							

1

Management Information System (Delaware CMIS)

Add New Client Information

You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process).

Would you like to:



Add Client ONLY



Add Client and Add NEW Household



Add Client and SEARCH Households

Cancel

2

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

8

Client - (103245) Doe, Jennifer Mass Visibility Update 

(103245) Doe, Jennifer Date: 03/01/2020 12:00:00 AM

Release of Information: None

Client Information | Service Transactions

Summary | **Client Profile** | Households | ROI | Entry / Exit | Case Managers | Case Plans | Assessments

Client Record Issue ID Card

Name	Doe, Jennifer
Name Data Quality	
Alias	
Social Security	
SSN Data Quality	
U.S. Military Veteran?	
Age	



Change Clear

Client Demographics 

Date of Birth	
Date of Birth Type	
Gender	
Primary Race	
Secondary Race	
Ethnicity	

3

NAVIGATION TABS

- These tabs are where client information will be added

A. Client Information

- Summary
- Client Profile
- Households
- ROI
- Entry/Exit
- Case Managers
- Case Plans

B. Service Transactions

Client - (1) Parker, Peter 

(1) Parker, Peter
Release of Information: **None**

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans

Added to the system 10/25/2021 02:22 PM

Name	Parker, Peter	Social Security	--1234	
Date of Birth		U.S. Military Veteran?	No (HUD)	
Gender				
Primary Race				
Secondary Race				

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**

Client - (1) Parker, Peter

(1) Parker, Peter
Release of Information: **None**

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans

Added to the system 10/25/2021 02:22 PM

Name	Parker, Peter	Social Security	--1234	
Date of Birth		U.S. Military Veteran?	No (HUD)	
Gender				
Primary Race				
Secondary Race				

Release of Information

Provider	Permission	Start Date	End Date
No matches.			

Add ROI

Entry/Exits

Program Type	Project Start Date	Exit Date
No matches.		

Add Entry / Exit

Households

ID	Type	Head of Household	Relationship
No matches.			

Search Existing Households | Start New Household

Services

Start Date	End Date	Provider
No matches.		

Add Service | Add Multiple Services

Outstanding Incoming Referrals

Referral Date	Referring Provider	Need Type
 10/23/2021	Centralized Intake of Delaware	Rapid Re-Housing Programs

Add Referral | Showing 1-1 of 1

 **Need Information**

Need	Rapid Re-Housing Programs (BH-0500.7000)
Provider	Centralized Intake of Delaware (464)
Date of Need	01/25/2021 03:27:21 PM
Amount if Financial	No amount entered.
Notes	No notes entered.

Referral Data [Send Summary](#)

Referred-To Provider	Ministry of Caring (84)
Needs Referral Date *	01 / 25 / 2021 3 : 27 : 21 PM
Referral Ranking	-Select-
Referral Outcome	-Select-

Follow Up Information

Projected Follow Up Date	<input type="checkbox"/>
Follow Up User	Centralized Intake of Delaware (464)

Referral Outcome Declined

Follow Up Information

If Canceled or Declined, Reason	-Select-
If needed, Referral Projected Follow Up Date	-Select-
Referral Follow Up User	Centralized Intake of Delaware (464)

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

Client - (103245) Doe, Jennifer Mass Visibility Update

(103245) Doe, Jennifer Date: 03/01/2020 12:00:00 AM
Release of Information: None

Client Information Service Transactions

Summary **Client Profile** Households ROI Entry / Exit Case Managers Case Plans Assessments

 Client Record Issue ID Card

Name	Doe, Jennifer
Name Data Quality	
Alias	
Social Security	
SSN Data Quality	
U.S. Military Veteran?	
Age	

 Client Demographics

Date of Birth	
Date of Birth Type	
Gender	
Primary Race	
Secondary Race	
Ethnicity	

 Change Clear

Client - (103245) Doe, Jennifer Mass Visibility Update

(103245) Doe, Jennifer Date: 03/01/2020 12:00:00 AM

Release of Information: None

Client Information Service Transactions

Summary **Client Profile** Households ROI Entry / Exit Case Managers Case Plans Assessments

 Client Record Issue ID Card

Name Doe, Jennifer

Name Data Quality

Alias

Social Security

SSN Data Quality

U.S. Military Veteran?

Age

 Client Demographics Age

Date of Birth

Date of Birth Type

Gender

Primary Race

Secondary Race

Ethnicity

1

Client Record

 Editing the Client Record Information could affect the Unique ID and the Client Search.

Client Record

Name	First	Middle	Last	Suffix
	Jennifer		Doe	
Name Data Quality	-Select-			
Alias				
Social Security	123	- 45	- 6789	
SSN Data Quality	-Select-			
U.S. Military Veteran?	-Select-			

Save Cancel

2

- To edit any information, click on the pencil icon
 - Complete/Update as many fields as possible
- Client Record
 - Data Quality for Name and SSN are required
- 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

Client Demographics

 Editing the Client Demographic Information could affect the Unique ID and the Client Search.

Client Demographics Age

Date of Birth / /    G

Date of Birth Data Quality -Select- G

Gender

- Female
- Male
- A gender other than singularly female or male (e.g., non-binary, genderfluid, agender, culturally specific gender)
- Transgender
- Questioning
- Client doesn't know
- Client refused
- Data not collected

Clear All

Primary Race -Select- G

Secondary Race -Select- G

Ethnicity -Select- G

Save Cancel

3



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**"

The screenshot shows a client profile for Jennifer Doe (ID: 103245). The 'Households' tab is selected and highlighted with a red box and the number '1'. Below the tabs, a message box with a red border and the number '2' contains the text: 'This Client is not currently a member of any Households.' At the bottom of the page, there are three buttons: 'Search Existing Households', 'Start New Household' (highlighted with a red arrow and the number '3'), and 'Exit'.

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

Household Type

Household Type* **-Select-**

Client Search

Name First Last Suffix

Name Data Quality **-Select-**

Alias

Social Security Number

Social Security Number Data Quality **-Select-**

U.S. Military Veteran? **-Select-**

Exact Match

Single Individual
Unaccompanied Youth
Female Single Parent
Two Parent Family
Non-custodial Caregiver(s)
Couple With No Children
Male Single Parent
Foster Parent(s)
Grandparent(s) and Child
Couple (Parent & Friend) and Child
Other
Not Applicable

are adding a New Client.

Client Number

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

Client ID #

2

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

Showing 1-1 of 1

Client Search

Please Search the System before adding a New Client. Hide Advanced Search

Name **1** First Jane Middle Last Doe Suffix

Name Data Quality -Select-

Alias

Social Security Number

Social Security Number Data Quality -Select-

U.S. Military Veteran? -Select-

Exact Match

3 Search Clear Add New Client With This Information Add Anonymous Client

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
2 + 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

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 #

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

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
- 103246	Doe, Josh						0

Showing 1-2 of 2

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

Household Information - (23691) Female Single Parent

(23691) Female Single Parent Save 3 Save & Exit Exit

Household Type* Female Single Parent

Income US\$0.00 monthly (US\$0.00 annual)

Client Count 2

Household Members **1** **2**

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(103245) Doe, Jennifer	27	Yes	Self	03 / 01 / 2020	0	1
(103246) Doe, Josh		No	son	03 / 01 / 2020	0	1

Add/Delete Household Members Household History Report

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

The screenshot shows a software interface for client assessment. It is divided into several sections:

- Household Members:** A table with columns: Name, Age, Head of Household, Relationship to Head of Household, Joined Household*, Previous Associations, and Household Count. It lists two members: (4) Skywalker, Luke (Age: 70, Head of Household: Yes, Relationship: Self) and (5) Yoda, Baby (Age: Unknown, Head of Household: No, Relationship: other non-relative).
- Household Data Sharing:** A section for the client (5) Yoda, Baby, with an 'Add Household Data' button.
- Individual Client Assessment:** The main assessment area, containing:
 - Household Members:** A list of household members with checkboxes. (4) Skywalker, Luke (Age: 70) and (5) Yoda, Baby (Age: Unknown) are checked. A red box with the number '3' highlights this list.
 - 1 Client Record:** A form for the selected client (Yoda, Baby) with fields for Name, Name Data Quality (Full Name Reported), Alias, Social Security, SSN Data Quality, U.S. Military Veteran?, and Age. A red box with the number '1' highlights this section.
 - 2 HUD PII-UDEs (Households Tab):** A form for demographic data including Date of Birth, Date of Birth Data Quality, Primary Race, Secondary Race, Ethnicity, Gender (with a dropdown menu showing options like Female, Male, Transgender, etc.), and Does the client have a disabling condition?. A red box with the number '2' highlights this section.
 - Disabilities:** A section with a 'Disability Type' field and an 'Add' button.
 - HUD Verification:** A warning icon and text.

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.

Client - (51) Doe, Jennifer

(51) Doe, Jennifer
Release of Information: None

-Switch to Another Household Member- Submit

Client Information Service Transactions

Summary Client Profile **1 Households** ROI Entry / Exit Case Managers Case Plans Assessments

▼ (16) Female Single Parent

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(51) Doe, Jennifer	28	Yes	Self	08/31/2018	0	1
(66) Doe, Jon		No	son	08/31/2018	0	1

2 Manage Household

► Previous Households

Search Existing Households Start New Household Exit

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

NOTE: Do *not* delete clients that will not enter your program

PHOTO # 1 Household Information - (16) Female Single Parent

1

(16) Female Single Parent Save Save & Exit

1 **Household Type *** Female Single Parent

Income US\$1,000.00 monthly (US\$12,000.00 annual) 🔍

Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations
(51) Doe, Jennifer	28	Yes	Self	08 / 31 / 2018	0
(66) Doe, Jon		No	son	08 / 31 / 2018	0

2 **Add/Delete Household Members** Household

PHOTO # 2

Add/Delete Household Members - (16) Female Single Parent

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(51) Doe, Jennifer	28	Yes	Self	08/31/2018	0	1
(66) Doe, Jon		No	son	08/31/2018	0	1

▼ **Previous Household Members**

This Household does not have any previous members.

3 **Add Clients to the Household**

Continue Cancel

Household Members						
Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(98150) Doe, Jennifer	28	Yes	Self	08/24/2018	0	1

Previous Household Members

This Household does not have any previous members.

Add Clients to the Household

Client Search

Please Search the System before adding a New Client.

Name: First Middle Last Suffix

Name Data Quality:

Alias:

Social Security Number: - -

Social Security Number Data Quality:

U.S. Military Veteran?:

Exact Match:

1

Add Clients to the Household

Client Search

Please Search the System before adding a New Client.

Name: First Middle Last Suffix

Name Data Quality:

Alias:

Social Security Number: - -

Social Security Number Data Quality:

U.S. Military Veteran?:

Exact Match:

Client Number

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

Client ID #:

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
<input type="button" value="+"/>	Doe, Jane	--2222	01/01/1901		Female		0
<input type="button" value="+"/>	Doe, John	--1111					0

Showing 1-2 of 2

2

- Use **Client Search** to check if a profile already exists
- Client Results**
 - If a profile exists, click on the green plus icon to add client
 - If none, select "Add New Client With This Information"
- 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

U.S. Military Veteran?:

Exact Match:

Client Number

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

Client ID #:

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
<input type="button" value="+"/>	5 Doe, John	--1111					0

Showing 1-1 of 1

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
<input type="button" value="-"/>	Doe, Jane	--2222	01/01/1901		Female		0

Showing 1-1 of 1

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

Household Information - (16) Female Single Parent

(16) Female Single Parent Save Save & Exit Exit

Household Type *

Income US\$3,500.00 monthly (US\$42,000.00 annual) 🔍

Client Count 3

Household Members **1** **2**

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(51) Doe, Jennifer	28	Yes	Self	08 / 31 / 2018	0 🔍	1 🔍
(8) Doe, Jane	117	No	-Select-	08 / 31 / 2018	0 🔍	1 🔍
(66) Doe, Jon		No	son	08 / 31 / 2018	0 🔍	1 🔍

Add/Delete Household Members Household History Report

▶ Previous Household Members

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**

The screenshot shows a client profile for Jennifer Doe (ID: 103245). The page has a yellow header with the client's name and a 'Mass Visibility Update' button. Below the header, there's a yellow bar with the client's name, date (03/01/2020 12:00:00 AM), and a 'Release of Information: None' status. A dropdown menu is set to '-Switch to Another Household Member-' with a 'Submit' button. The main content area has two tabs: 'Client Information' (selected) and 'Service Transactions'. Under 'Client Information', there are sub-tabs: 'Summary', 'Client Profile', 'Households', 'ROI' (selected and circled in red with a '1' above it), 'Entry / Exit', 'Case Managers', 'Case Plans', and 'Assessments'. The 'ROI' sub-tab shows a table with columns: 'Provider', 'Permission', 'Start Date', and 'End Date'. The table is empty, displaying 'No matches.' The 'Add Release of Information' button in the table is circled in red with a '2' to its left. An 'Exit' button is located at the bottom right of the page.

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)

Release of Information

Release of Information - (103245) Doe, Jennifer

Household Members

i To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.

(23691) Female Single Parent

(103245) Doe, Jennifer

(103246) Doe, Josh

Release of Information Data

Provider*	The Salvation Army (57)	Search	My Provider	Clear
Release Granted*	Yes			
Start Date*	02 / 01 / 2022			
End Date*	02 / 01 / 2025			
Documentation	Signed Statement from Client			
Witness	AR			

Save Release of Information Cancel

Release of Information

Release of Information - (103245) Doe, Jennifer

Household Members

i To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.

(23691) Female Single Parent

(103245) Doe, Jennifer

(103246) Doe, Josh

Release of Information Data

Provider*	The Salvation Army (57)	Search	My Provider	Clear
Release Granted*	Yes			
Start Date*	03 / 01 / 2020			
End Date*	02 / 28 / 2021			

5 Documentation Signed Statement from Client

6 Witness AR

7 Save Release of Information

Cancel

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**

Client - (103245) Doe, Jennifer Mass Visibility Update

(103245) Doe, Jennifer Date: 03/01/2020 12:00:00 AM

Release of Information: **None** -Switch to Another Household Member- Submit

Client Information Service Transactions

Summary Client Profile Households ROI **1** Entry / Exit Case Managers Case Plans Assessments

i Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
2 Add Entry / Exit No matches.						

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.

Project Start Data - (103245) Doe, Jennifer

Household Members

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

(23691) Female Single Parent

1 (103245) Doe, Jennifer (Joined Household: 03/01/2020)

(103246) Doe, Josh (Joined Household: 03/01/2020)

Project Start Data - (103245) Doe, Jennifer

2 **Provider*** Housing Alliance Delaware (12)

3 **Type*** -Select-

4 **Project Start Date*** 03 / 01 / 2020 12 : 00 : 00 AM

Save & Continue

Cancel

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider* SA - Home4Good Prevention (01/01/20-12/31/20) (759) Search My Provider Clear

Type* HUD Update

Household Members Associated with this Entry / Exit

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(103245) Doe, Jennifer	Yes	03/01/2020						
(103246) Doe, Josh	No	03/01/2020						

Include Additional Household Members Showing 1-2 of 2

Entry Assessment

Household Members

- (103245) Doe, Jennifer Age: 27 Veteran: No (HUD)
- (103246) Doe, Josh Age: Unknown Veteran: No (HUD)

Household Data Sharing

Client: (103245) Doe, Jennifer Add Household Data

HUD CoC & ESG Entry All Other Projects (2020) DSHA Prevention Entry Date: 03/01/2020 12:00:00 AM

Call In Date [] / [] / []

Date of Birth [12] / [12] / [1992]

Date of Birth Type [Full DOB Reported (HUD)]

Primary Race [White (HUD)]

Secondary Race [White (HUD)]

Ethnicity [Non-Hispanic/Non-Latino (HUD)]

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:	<input type="text"/> / <input type="text"/> / <input type="text"/>    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 recent episode of homelessness, not the very first time

Income from Any Source | No (HUD)  

A. Monthly Income 

Monthly Amount	Source of Income	Start Date*	End Date
Add View Gross Income			
Total Monthly Income	<input type="text"/>		
Non-cash benefit from any source	<input type="text" value="-Select-"/>		

B. Non-Cash Benefits 

Source of Non-Cash Benefit	Start Date*	End Date	Amount of Non-Cash Benefit
Add			
Covered by Health Insurance	<input type="text" value="-Select-"/>		

C. Health Insurance 

Start Date*	Health Insurance Type	Covered?	End Date
Add			
Does the client have a disabling condition?	<input type="text" value="-Select-"/>		

D. Disabilities 

Disability Type
Add

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)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

HUD Verification: Add Recordset

Per Source of records for Mo per Source of

Select the Source? va Source of

Source of Income

Alimony or Other S
Earned Income (H
Pension or retirem
Private Disability I
VA Non-Service Co
Unemployment Ins
SSDI (HUD)
SSI (HUD)
Worker's Compens
TANF (HUD)
VA Service Connec
Retirement Incom
Other (HUD)
Child Support (HU

Monthly Income

Monthly Amount G ← 1

Source of Income Earned Income (HUD)

If Other, Please Specify G

Receiving Income Source? Yes

2 Additional Comment G

3 Start Date * / / G

** End Date / / G

Save Cancel

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)

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)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

UPDATING SUB-ASSESSMENTS

Income from Any Source Yes (HUD) G

Monthly Income 1 HUD Verification

Monthly Amount	Source of Income	Start Date *	End Date
	SSI (HUD)	01/01/2020	
	TANF (HUD)	01/01/2020	
	Child Support (HUD)	01/01/2020	
	SSDI (HUD)	01/01/2020	
	Earned Income (HUD)	01/01/2020	

Add View Gross Income Showing 1-5 of 18 First Previous Next Last

HUD Verification: Monthly Income for 03/01/2020

Per Source of Income, the current records for Monthly Income as of 03/01/2020 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 03/01/2020, records containing "Yes" values will be displayed and take precedence for reporting purposes.

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

Save Save & Exit Exit

- If there is previous information saved, click on **HUD Verification** to update any sub-assessment
 - Applies to Income, Non-cash benefits, Insurance, Disability
- Ensure this reflects the client's information *upon entry*. **To make changes, click on the pencil icon** for any applicable source
- 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

HUD Verification: Edit Recordset - (1) Test, Justin

Per Source of Income, the current records for Monthly Income as of 03/01/2020 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 03/01/2020, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Source of Income	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Print Recordset Save Cancel

HUD Verification: Monthly Income for 03/24/2020

Per Source of Income, the current records for Monthly Income as of 03/24/2020 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 03/24/2020, 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)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save Save & Exit Exit

HUD Verification: Add Recordset

Per Source of records for Mo per Source of

Select the Source? ve Source of

Source of Income

Monthly Income

Monthly Amount 700 G

Source of Income Earned Income (HUD)

If Other, Please Specify

Receiving Income Source? Yes

Additional Comment

Start Date* 03 / 01 / 2020 G

End Date

Save Cancel

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

Income from Any Source Yes (HUD) G

Monthly Income HUD Verification ✓

Monthly Amount	Source of Income	Start Date *	End Date
US\$700.00	Earned Income (HUD)	03/01/2020	
	SSI (HUD)	01/01/2020	
	TANF (HUD)	01/01/2020	
	Child Support (HUD)	01/01/2020	
	SSDI (HUD)	01/01/2020	

Add View Gross Income Showing 1-5 of 19 First Previous Next Last

Total Monthly Income 800 G

Income from Any Source G

Monthly Income HUD Verification 

Monthly Amount	Source of Income	Start Date *	End Date
US\$700.00	Earned Income (HUD)	03/01/2020	
	SSI (HUD)	01/01/2020	
	TANF (HUD)	01/01/2020	
	Child Support (HUD)	01/01/2020	
	SSDI (HUD)	01/01/2020	

Add View Gross Income Showing 1-5 of 19 First Previous Next Last

Total Monthly Income G

Non-cash benefit from any source G

Non-Cash Benefits HUD Verification 

Source of Non-Cash Benefit	Start Date *	End Date	Amount of Non-Cash Benefit
No matches.			

Add

Covered by Health Insurance G

Health Insurance 3 HUD Verification 

Start Date *	Health Insurance Type	Covered?	End Date
03/01/2020	Other	No	

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

Client - (103245) Doe, Jennifer Mass Visibility Update 

(103245) Doe, Jennifer Date: 03/01/2020 12:00:00 AM

Release of Information: None -Switch to Another Household Member-

Client Information Service Transactions

Summary Client Profile Households ROI **Entry / Exit** Case Managers Case Plans Assessments

 Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
 SA - Home4Good Prevention (01/01/20-12/31/20) (759) (759)	HUD	 03/01/2020 				 

Showing 1-1 of 1



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.

Client - (1) Test, Justin Mass Visibility Update

(1) Test, Justin
Release of Information: None -Switch to Another Household Member- Submit

Client Information Service Transactions **1**

Summary Client Profile Households ROI Entry / Exit **Case Managers** Case Plans Assessments

Case Managers

	Name	Provider	Phone Number	Start Date	End Date
  	Kimberly Weldon	Connections- SSVF Enrolled: HP		09/01/2019	09/01/2019

2 Add Case Manager Showing 1-1 of 1 Exit

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

1 **(17145) Two Parent Family**

- (1) Test, Justin
- (100316) Test, jodi
- (95792) TEST, Jackson

2 **Type *** ServicePoint User Me Other

3 **Name ***

Title

Phone Number

Email Address

4 **Provider ***

Start Date * / /   

End Date / /   

5

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)

The screenshot shows the client information page for Justin Test. The page is titled "Client - (1) Test, Justin" and includes a "Mass Visibility Update" button. Below the title, there is a section for "(1) Test, Justin" with a "Release of Information: None" status and a "-Switch to Another Household Member-" dropdown menu. The "Client Information" section is active, and the "Case Plans" tab is highlighted with a red box and a red number "1". Below the tabs, there is a "Goals" section with a table and an "Add Goal" button. The "Case Plans File Attachments" section has a table with columns for "Date Added", "Name", "Description", "Type", and "Provider", and an "Add New File Attachment" button highlighted with a red box and a red number "2". There are also "Print Case Plan" and "Exit" buttons at the bottom.

Classification	Type	Date Set	Target Date	Status	Notes	Latest Note Date
No matches.						

Date Added	Name	Description	Type	Provider
No matches.				

Client - (1) Test, Justin Mass Visibility Update

(1) Test, Justin
Release of Information: None -Switch to Another Household Member-

Client Information

Summary Transactions

Case Managers **Case Plans** Assessments

Upload Attachment

Name * **1** Choose File J. Test Disability Document.docx

Description **2**

3 Upload

Goals

Classifications

Add Goal

Status	Notes	Latest Note Date
No matches.		

Case Plans File Attachments

Date Added	Name	Description	Type	Provider
No matches.				

Add New File Attachment

Case Plans File Attachments

Date Added	Name	Description	Type	Provider
09/18/2019	J. Test Disability Document.docx	Disability Determination from Connections CSP 6.30	docx	Housing Alliance Delaware

Add New File Attachment Showing 1-1 of 1

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**.

The screenshot shows a web interface for a client named Jennifer Doe (ID: 103245). At the top, there is a header with the client's name and a 'Mass Visibility Update' button. Below this is a sub-header with the client's name and a 'Release of Information: None' status. A dropdown menu is set to '-Switch to Another Household Member-' with a 'Submit' button. The main content area is titled 'Client Information' and has a red box around the 'Service Transactions' tab, with a red '1' next to it. Below this is the 'Service Transaction Dashboard' which contains several buttons: 'Add Need', 'Add Service' (circled in red with a red '2' next to it), 'Add Multiple Services', 'Add Referrals', 'View Previous Service Transactions', 'View Shelter Stays', and 'View Entire Service History'.

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

Client - (103245) Doe, Jennifer Mass Visibility Update

(103245) Doe, Jennifer
Release of Information: None -Switch to Another Household Member- Submit

Client Information **Service Transactions**

Add Service

Household Members

To include Household members for this Service, click the box beside each name. Only members from the SAME Household may be selected.

(23691) Female Single Parent

(103245) Doe, Jennifer (Primary Client)

(103246) Doe, Josh

Service Provider * Housing Alliance Delaware (12) Search My Provider Clear

Creating User Amelia Ramsaran

Start Date * 03 / 24 / 2020 1 : 18 : 46 PM

End Date 03 / 24 / 2020 1 : 18 : 46 PM

Service Type * -Select- Look Up

Provider Specific Service -Select-

Save & Continue Cancel

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@housingalliance.org to update your options

Client - (103245) Doe, Jennifer Mass Visibility Update

(103245) Doe, Jennifer
Release of Information: None -Switch to Another Household Member- Submit

Client Information **Service Transactions**

Add Service

Household Members

To include Household Member (23691) Female Sing (103245) Doe, Jenni (103246) Doe, Josh

Service Provider *
Creating User
Start Date *
End Date
1 Service Type * Look Up

Provider Specific Service

2 Save & Continue Cancel

name. Only members from the SAME Household

Clear

Benefits Assistance (FT-1000)
Case/Care Management (PH-1000)
Emergency Shelter (BH-1800)
Environment and Public Health/Safety (J)
Homeless Permanent Supportive Housing (BH-8400.3000)
Housing Counseling (BH-3700)
Income Support and Employment (N)
Job Development (ND-3400)
Mental Health and Substance Use Disorder Services (R)
Mortgage Payment Assistance (BH-3800.5000)
Rental Deposit Assistance (BH-3800.7250)
Rent Payment Assistance (BH-3800.7000)
Transitional Housing/Shelter (BH-8600)
Utility Deposit Assistance (BV-8900.9150)
Utility Service Payment Assistance (BV-8900.9300)

Edit Service

Household Members

To update Household members for this Service, click the box beside each name.

(23691) Female Single Parent

(103245) Doe, Jennifer (Primary Client)

(103246) Doe, Josh

Service Provider* Housing Alliance Delaware (12)

Creating User: Amelia Ramsaran

Start Date* 03 / 24 / 2020 1 : 18 : 46 PM

End Date 03 / 24 / 2020 1 : 18 : 46 PM

Service Type* Low Cost School Supplies (HL-8120.7800-450)

Provider Specific Service: -Select-

1

Apply Funds for Service

Funding Sources

Source	Amount
2 <input type="button" value="Add Funding Source"/>	Calculate Total: \$0.00

Support Documentation

Date Added	Name	Description	Type
Add Support Documentation			
No matches.			

Follow Up Information

Projected Follow Up Date: [] / [] / []

Follow Up User: Ministry of Caring (84)

Follow Up Made: -Select-

Completed Follow Up Date: [] / [] / []

3 **Need Information**

Need Status*: Identified

Outcome of Need: -Select-

If Need is Not Met, Reason: -Select-

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

Client - (103245) Doe, Jennifer

(103245) Doe, Jennifer

Client Information | **Service Transactions**

Needs | **Services** | Referrals | Shelter Stays | Entire Service History

Previous Services

Select Dates	Start Date	End Date	Search
-Select-	[] / [] / []	[] / [] / []	<input type="button" value="Search"/>
4 <input type="button" value="Pencil"/>	Service Start Date	Service End Date	Provider of Service
	03/24/2020	03/24/2020	Housing Alliance Delaware
			Service Provided
			Yes
			Date Added
			03/24/2020
			Date Updated
			03/24/2020
			User Updating
			Amelia Ramsaran

Showing 1-1 of 1

5

WHEN TO ADD AN INTERIMS-UPDATE

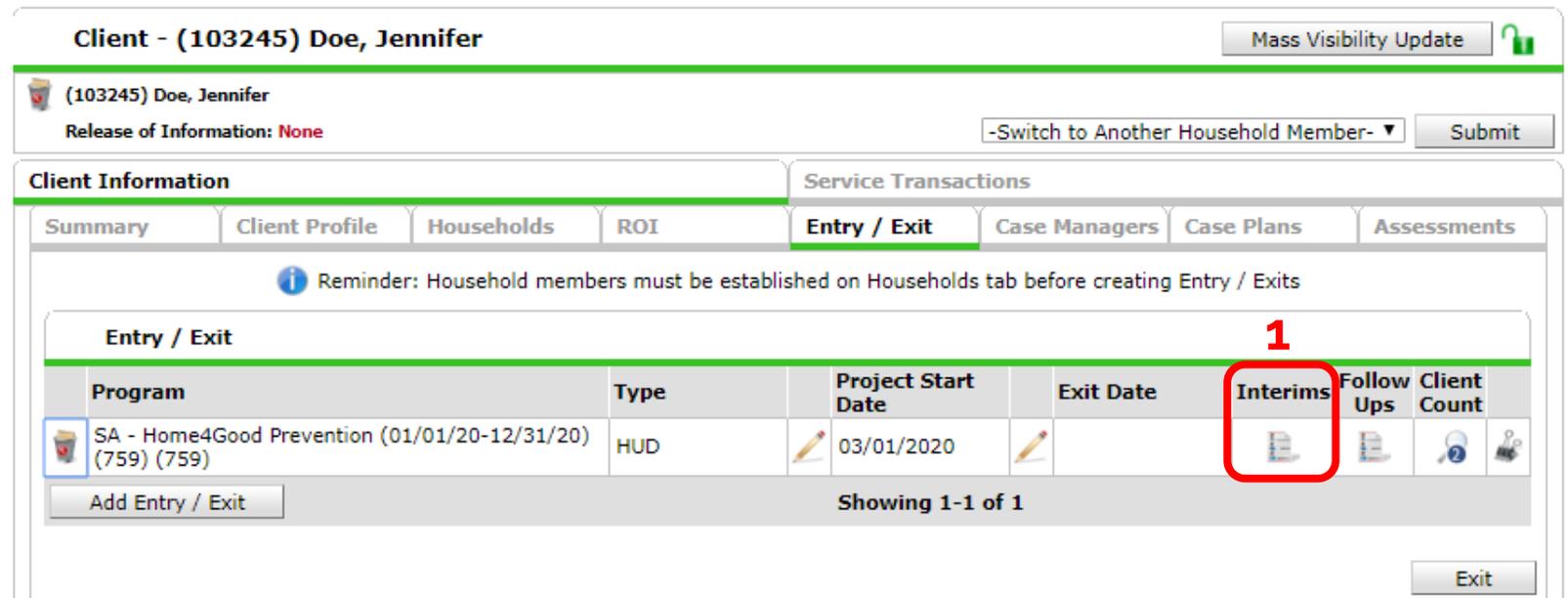
For each life change in any of the following categories:

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

Where to locate it:

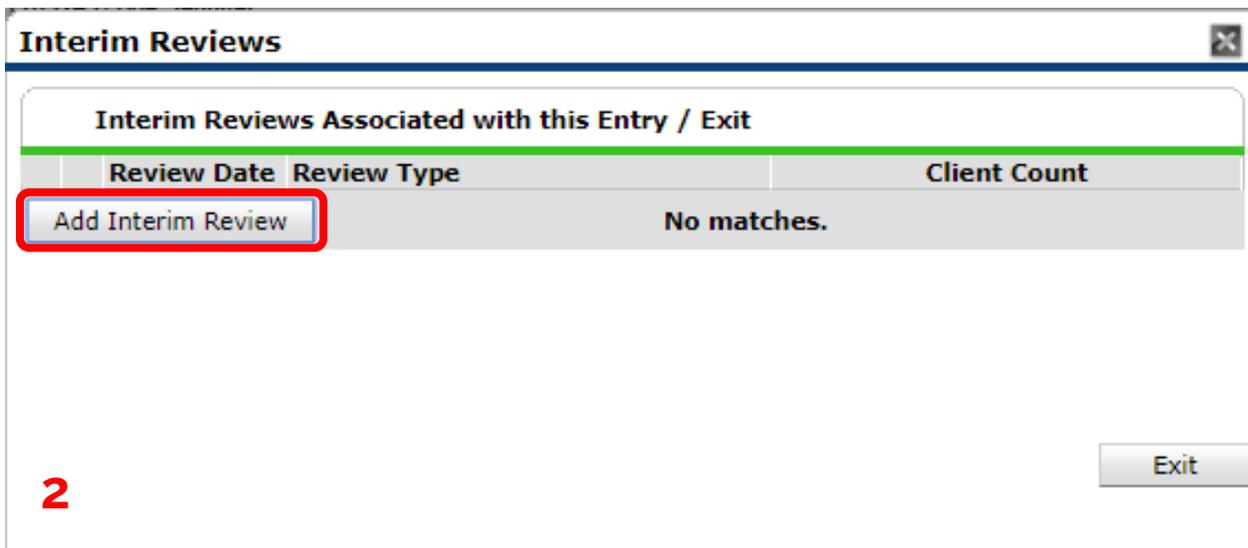
1. On client's Entry/Exit tab, click on **Interims**

Next steps are on the next slide.



The screenshot shows a client profile for Jennifer Doe (ID: 103245). The 'Entry / Exit' tab is selected, displaying a table with one entry: 'SA - Home4Good Prevention (01/01/20-12/31/20) (759) (759)' of type 'HUD' starting on 03/01/2020. The 'Interims' column in the table is circled in red and labeled with a red '1', indicating where to click to add an update. Other tabs include Summary, Client Profile, Households, ROI, Case Managers, Case Plans, and Assessments. A reminder message states: 'Reminder: Household members must be established on Households tab before creating Entry / Exits'.

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
SA - Home4Good Prevention (01/01/20-12/31/20) (759) (759)	HUD	03/01/2020				



2

2. Click on **Add Interim Review**

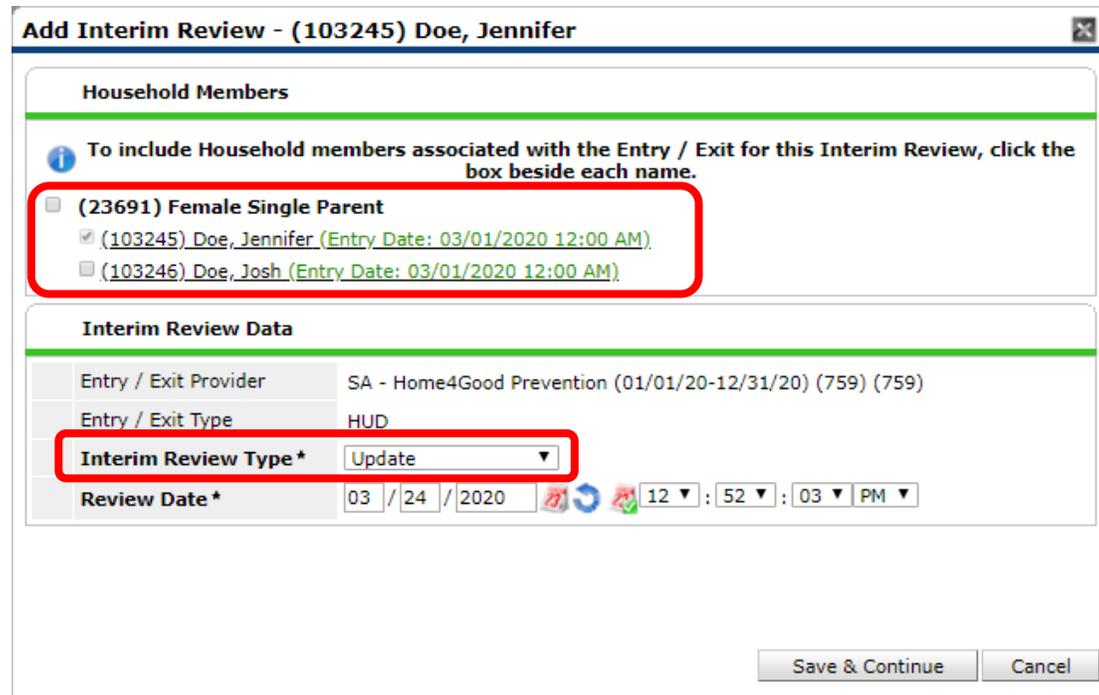
3. Confirm details

- 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

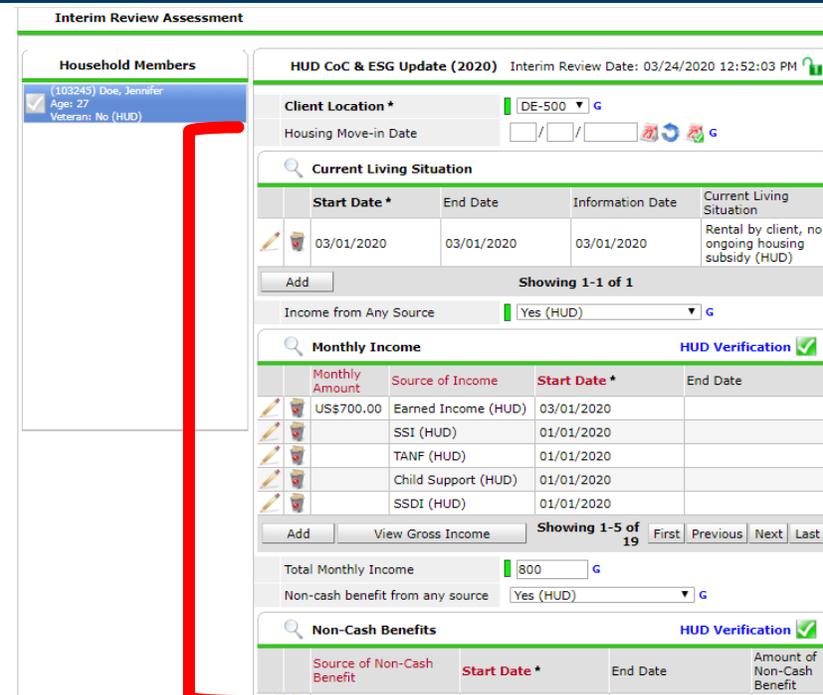
- Housing Move-in Date
- PATH Status updates
- Income/ Non-cash benefits/ Insurance/ Disabling Condition

50



3

4



50

WHAT A COMPLETED INTERIM-UPDATE LOOKS LIKE

Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
03/24/2020	Update	1

Add Interim Review Showing 1-1 of 1

Client - (103245) Doe, Jennifer

Mass Visibility Update

(103245) Doe, Jennifer
Release of Information: None

-Switch to Another Household Member- Submit

Client Information

Summary Client Profile Households ROI

Service Transactions

Entry / Exit Case Managers Case Plans Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
SA - Home4Good Prevention (01/01/20-12/31/20) (759) (759)	HUD	03/01/2020		1	1	2

Add Entry / Exit Showing 1-1 of 1

Exit

51

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

VA SSVF Update (2020)		Interim Review Date: 03/24/2020 01:02:14 PM	
Client Location *	DE-500	G	
Housing Move-in Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	G	
Income from Any Source	Yes (HUD)	G	

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

Add Interim Review - (103245) Doe, Jennifer

Household Members

To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name.

- (23691) Female Single Parent
 - (103245) Doe, Jennifer (Entry Date: 03/01/2020 1:06 PM)
 - (103246) Doe, Josh (Entry Date: 03/01/2020 1:06 PM)

Interim Review Data

Entry / Exit Provider	VMC - SSVF Enrolled: RR (508)
Entry / Exit Type	VA
Interim Review Type *	-Select-
Review Date *	-Select-

1 : 06 : 40 PM

Save & Continue Cancel

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.

Client - (103245) Doe, Jennifer

Mass Visibility Update

(103245) Doe, Jennifer

Release of Information: None

-Switch to Another Household Member- Submit

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
SA - Home4Good Prevention (01/01/20-12/31/20) (759) (759)	HUD	03/01/2020				

Add Entry / Exit

Showing 1-1 of 1

Exit

1

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

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider* SA - Home4Good Prevention (01/01/20-12/31/20) (759) (759)

Type* HUD

Household Members Associated with this Entry / Exit

	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(103245) Doe, Jennifer	Yes	03/01/2020	03/24/2020			Completed program	Owned by client, with ongoing housing subsidy (HUD)	
	(103246) Doe, Josh	No	03/01/2020	03/24/2020			Completed program	Owned by client, with ongoing housing subsidy (HUD)	

Showing 1-2 of 2

Entry Assessment

Exit Assessment

Household Members

- (103245) Doe, Jennifer
Age: 27
Veteran: No (HUD)
- (103246) Doe, Josh
Age: Unknown
Veteran: No (HUD)

Household Data Sharing

Client: (103245) Doe, Jennifer

HUD CoC & ESG Exit (2020) Home4Good Exit Date: 03/24/2020 01:11:44 PM

Financial Assistance Provided? (such as rental, utility or security deposits) * G

Total Monthly Income G

Income from Any Source G

WHAT A COMPLETED PROJECT EXIT LOOKS LIKE

Client - (103245) Doe, Jennifer Mass Visibility Update 

 (103245) Doe, Jennifer
Release of Information: **None** -Switch to Another Household Member- ▾ Submit

Client Information Service Transactions

Summary Client Profile Households ROI **Entry / Exit** Case Managers Case Plans Assessments

 Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
 SA - Home4Good Prevention (01/01/20-12/31/20) (759) (759)	HUD	 03/01/2020	 03/24/2020			 

Add Entry / Exit Showing 1-1 of 1 Exit



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.