

CLIENTS MODULE

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**HOUSING
ALLIANCE
DELAWARE**

TRAINING OVERVIEW

This PowerPoint details how to utilize the **Clients** module for the following project types:

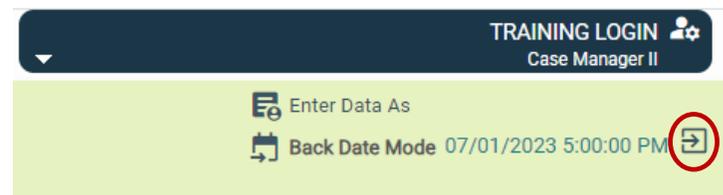
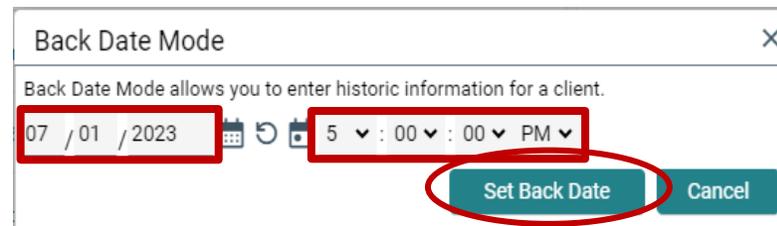
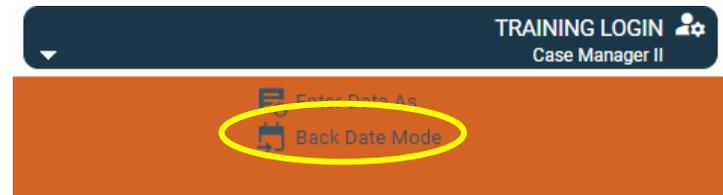
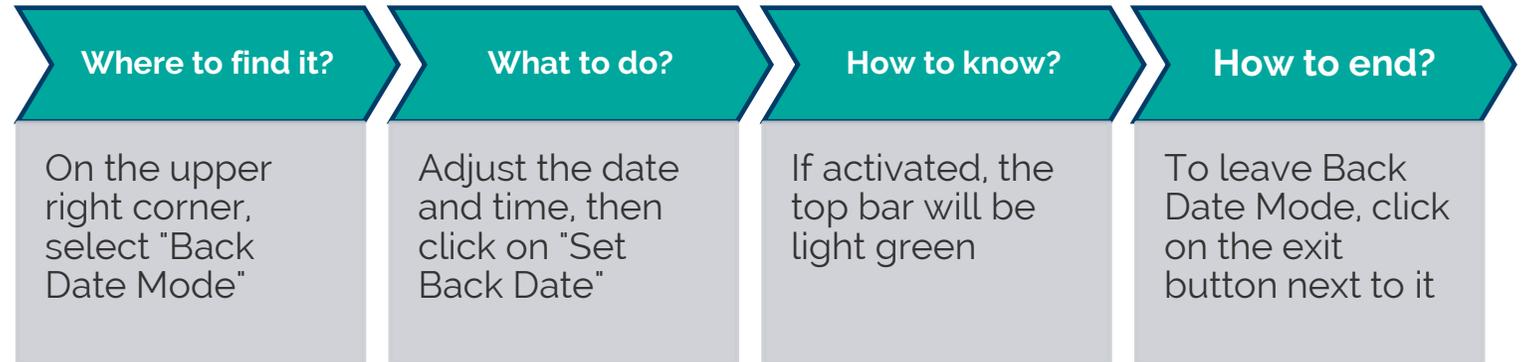
- Emergency Shelter (large or congregate only)
- Rapid Re-Housing
- Permanent Supportive Housing (scattered site)
- Homeless Prevention
- Diversion
- Service Only

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BACK DATE MODE

- 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:
 - 5:00 PM for project entries
 - 11:00 PM for updates and exits



CLIENT SEARCH

- Select **Clients** 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

Please Search the System before adding a New Client.

Name: pet Middle: Last: park Suffix:

Name Data Quality: -Select-

Alias:

Social Security Number:

Social Security Number Data Quality: -Select-

U.S. Military Veteran?: -Select-

Exact Match:

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	-0000	10/08/2001		<input type="checkbox"/>	1
11	Parkington, Peter	564-32-3454			<input type="checkbox"/>	0

Showing 1-2 of 2

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 Clients.
- 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.**

Clients > Client Search Type here for Global Search

Client Search

Please Search the System before adding a New Client.

Name	First Tony	Middle	Last Stark	Suffix
Name Data Quality	Full Name Reported			
Alias				
Social Security Number	-2468			
Social Security Number Data Quality	Approximate or partial SSN reported (HUD)			
U.S. Military Veteran?	No (HUD)			
Exact Match	<input type="checkbox"/>			

Client Number

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

Client ID #

Client Results

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

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). Continue with Add New Client?

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

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 New Client** and/or **Add Client Only**
3. Once created, a blank profile will appear.
 - Client can now be entered into a program

Clients > Client Profile Type here for Global Search

Client - (13) Stark, Tony

(13) Stark, Tony
Release of Information: None

Client Information Service Transactions

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

Added to the system 08/02/2023 02:31 PM

Name	Stark, Tony	Social Security	-2468
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.			

Households

ID	Type	Head of Household	Relationship
No matches.			

Outstanding Incoming Referrals

Referral Date	Referring Provider	Need Type
No matches.		

Entry/Exits

Program	Type	Project Start Date	Exit Date
No matches.			

Services

Start Date	End Date	Provider
No matches.		

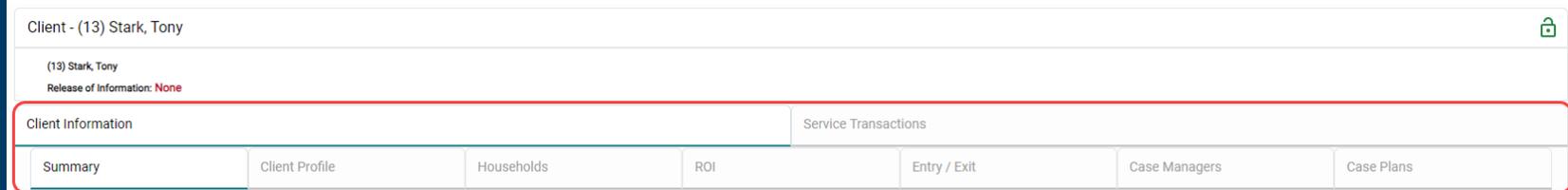
NAVIGATION TABS

- These tabs are where 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**

Client - (23) Albertson, Alfred

(23) Albertson, Alfred
Release of Information: None

Client Information | Service Transactions

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

Added to the system 08/17/2023 10:19 AM

Name	Albertson, Alfred	Social Security	--0001
Date of Birth		U.S. Military Veteran?	Yes (HUD)
Gender			
Primary Race			
Secondary Race			



Release of Information

Provider	Permission	Start Date	End Date
No matches.			

Households

ID	Type	Head of Household	Relationship
Search Existing Households Start New Household			

Entry/Exits

Program	Type	Project Start Date	Exit Date
No matches.			

Services

Start Date	End Date	Provider
No matches.		

Outstanding Incoming Referrals

Referral Date	Referring Provider	Need Type
08/17/2023	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	07/28/2023 01:00:31 PM
Amount if Financial	No amount entered.
Notes	No notes entered.

Referral Data

Referred-To Provider	YOUR AGENCY HERE (4)
Needs Referral Date *	07 / 28 / 2023    1 : 00 : 31 PM
Referral Ranking	-Select-
Referral Outcome	-Select-

Referral Outcome Declined

If Canceled or Declined, Reason -Select-

Follow Up Information

Projected Follow Up Date

Follow Up User YOUR AGE

- Select-
- Client Not Eligible
- Client Refused Service
- Client Was a No-Show
- Service Does Not Exist
- Service Not Accessible
- Unknown

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

Clients > Client Profile Type here for Global Search    

Client - (23) Albertson, Alfred 

(23) Albertson, Alfred
Release of Information: **None**

Client Information Service Transactions

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

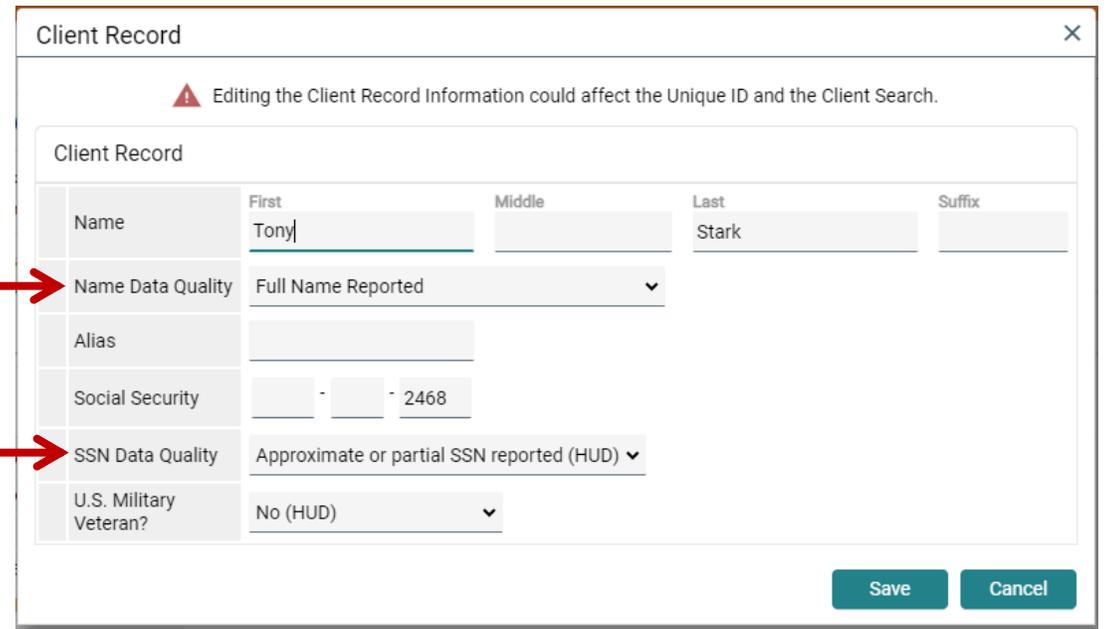
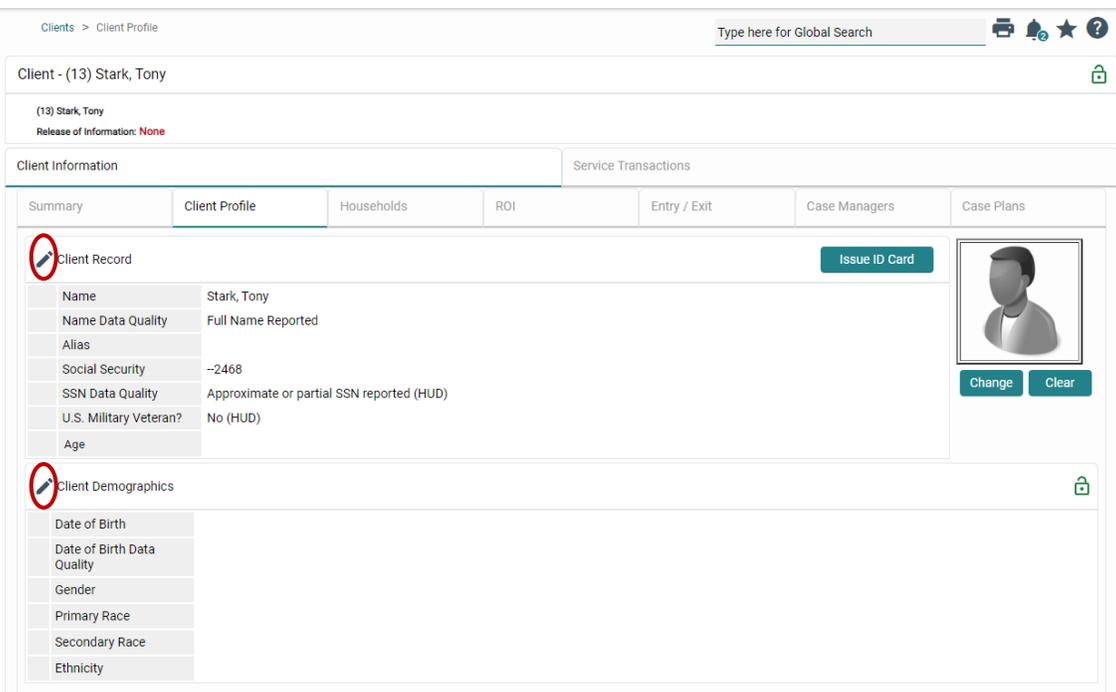
 Client Record [Issue ID Card](#)

Name	Albertson, Alfred
Name Data Quality	Full Name Reported
Alias	
Social Security	--0001
SSN Data Quality	Approximate or partial SSN reported (HUD)
U.S. Military Veteran?	Yes (HUD)
Age	

 Client Demographics 

Date of Birth	
Date of Birth Data Quality	
Gender	
Primary Race	
Secondary Race	
Ethnicity	

 [Change](#) [Clear](#)



1. To edit client's information, click on the pencil icon

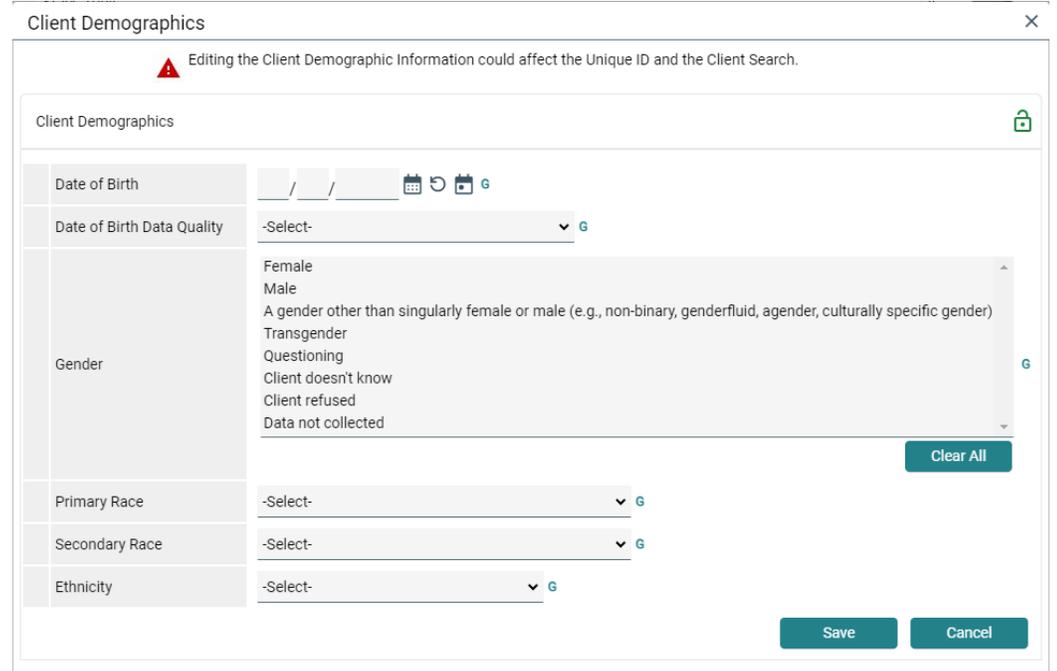
- Complete/Update as many fields as possible

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 by holding down the Ctrl-button
- Ethnicity and Race are independent questions and both need to be answered



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 web interface for a client profile. At the top, there is a breadcrumb 'Clients > Client Profile' and a search bar. The client name is '(13) Stark, Tony' with a lock icon. Below this, there are two tabs: 'Client Information' and 'Service Transactions'. Under 'Client Information', there are several sub-tabs: 'Summary', 'Client Profile', 'Households', 'ROI', 'Entry / Exit', 'Case Managers', and 'Case Plans'. The 'Households' tab is selected and highlighted with a red box and a red number 1. Below the tabs, there is a message box with an information icon and the text 'This Client is not currently a member of any Households.', which is also highlighted with a red box and a red number 2. At the bottom, there are three buttons: 'Search Existing Households', 'Start New Household', and 'Exit'. The 'Start New Household' button is highlighted with a red box and a red number 3.

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 →

Add New Household

Household Type

1 Household Type *

Client Search

Please Search the System before adding a New Client. [Hide Advanced Search](#)

Name	First	Middle	Last	Suffix	
Name Data Quality	<input type="text" value="-Select-"/>				
Alias	<input type="text"/>				
Social Security Number	<input type="text"/>	-	<input type="text"/>	-	<input type="text"/>
Social Security Number Data Quality	<input type="text" value="-Select-"/>				
U.S. Military Veteran?	<input type="text" value="-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 to add that Client to this Household.

Client ID # [Submit](#)

2 Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
13	Stark, Tony	--2468				0

Showing 1-1 of 1

[Continue](#) [Cancel](#)

Household Type * Male Single Parent

Client Search

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

1

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

2

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
+	Stacy, Gwen	--0911	03/06/2002			0

Showing 1-1 of 1

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
13	Stark, Tony	--2468				0

Showing 1-1 of 1

Continue Cancel

ADDING HOUSEHOLD MEMBERS

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

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
	Stacy, Gwen	--0911	03/06/2002			0 
2	13 Stark, Tony	--2468				0 

Showing 1-2 of 2

3

Household Information - (4) Male Single Parent

(4) Male Single Parent Save Save & Exit Exit

Household Type * Male Single Parent

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

Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(14) Stark, Morgan	No	No	-Select-	08 / 02 / 2023	0	1
(13) Stark, Tony	No	No	-Select-	08 / 02 / 2023	0	1

Add/Delete Household Members Household History Report

HEAD OF HOUSEHOLD

1. Select the **Head of Household**
 - *There can only be one per household*, even in a two parent/adult household
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(s) through **Household Members** section

Individual Client Assessment

Household Members

- (13) Stark, Tony
Self, Age: Unknown
- (14) Stark, Morgan
daughter, Age: Unknown

3

Client Record

Issue ID Card

Name	Stark, Tony
Name Data Quality	Full Name Reported
Alias	
Social Security	--2468
SSN Data Quality	Approximate or partial SSN reported (HUD)
U.S. Military Veteran?	No (HUD)
Age	

1

HUD PII-UDEs (Households Tab)

Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>
Date of Birth Data Quality	-Select-
Primary Race	-Select-
Secondary Race	-Select-
Ethnicity	-Select-
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
Does the client have a disabling condition?	-Select-

Clear All

Disabilities

HUD Verification

Disability Type

Add

2

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, **Manage Household** over starting a new one
 - E.g.: additional children, new partner, extended family, etc.

The screenshot shows the 'Client Profile' page for Tony Stark. The 'Households' tab is selected and highlighted with a red box and a red '1'. Below the tab, a table lists household members. The 'Manage Household' button is highlighted with a red box and a red '2'.

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(13) Stark, Tony		Yes	Self	08/02/2023	0	1
(14) Stark, Morgan		No	daughter	08/02/2023	0	1

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 - (4) Male Single Parent

(4) Male Single Parent

Household Type * Two Parent Family

Income \$530.00 Monthly (\$6360.00 Annual)

Client Count 2

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(13) Stark, Tony		Yes	Self	08 / 02 / 2023	0	1
(14) Stark, Morgan		No	daughter	08 / 02 / 2023	0	1

Add/Delete Household Members

Household History Report

PHOTO # 2

Add/Delete Household Members - (4) Male Single Parent

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(13) Stark, Tony		Yes	Self	08/02/2023	0	1
(14) Stark, Morgan		No	daughter	08/02/2023	0	1

Previous Household Members

This Household does not have any previous members.

Add Clients to the Household

Continue Cancel

Add/Delete Household Members - (4) Male Single Parent

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(13) Stark, Tony		Yes	Self	08/02/2023	0	1
(14) Stark, Morgan		No	daughter	08/02/2023	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. Hide Advanced Search

Name	First	Middle	Last	Suffix
	Pepper		Potts	

Name Data Quality: -Select-

Alias:

Social Security Number: . . .

Social Security Number Data Quality: -Select-

U.S. Military Veteran?: -Select-

Exact Match:

Search Clear Add New Client With This Information Add Anonymous Client

Add Clients to the Household

Client Search

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

Name	First	Middle	Last	Suffix
	Pepper		Potts	

Name Data Quality: -Select-

Alias:

Social Security Number: . . .

Social Security Number Data Quality: -Select-

U.S. Military Veteran?: -Select-

Exact Match:

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
	Stacy, Gwen	--0911	03/06/2002			0

Showing 1-1 of 1

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
No matches.						

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
3	Stacy, Gwen	--0911	03/06/2002			0

Showing 1-1 of 1

Continue Cancel

- 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

1

2

3

FINAL REMINDERS FOR ADDING TO EXISTING HOUSEHOLDS

1. Designate **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 - (4) Two Parent Family

(4) Two Parent Family

Save

Save & Exit

Exit

Household Type *	Two Parent Family
Income	US\$0.00 monthly (US\$0.00 annual)
Client Count	3

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(13) Stark, Tony		Yes	Self	08 / 02 / 2023	0	1
(15) Potts, Pepper		No	-Select-	08 / 02 / 2023	0	1
(14) Stark, Morgan		No	daughter	08 / 02 / 2023	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 web interface for a client profile. At the top, there is a breadcrumb 'Clients > Client Profile' and a search bar 'Type here for Global Search'. The client name is '(13) Stark, Tony'. Below the name, there is a 'Release of Information: None' status and a '-Switch to Another Household Member-' dropdown with a 'Submit' button. The main content area has two tabs: 'Client Information' and 'Service Transactions'. Under 'Client Information', there are sub-tabs: 'Summary', 'Client Profile', 'Households', 'ROI', 'Entry / Exit', 'Case Managers', and 'Case Plans'. The 'ROI' tab is selected and highlighted with a red box and a red '1'. Below the sub-tabs, there is a 'Release of Information' section with a table. The table has columns for 'Provider', 'Permission', 'Start Date', and 'End Date'. Below the table, there is a red box with a red '2' and the text 'Add Release of Information'. The table itself shows 'No matches.' and an 'Exit' button is at the bottom right.

Provider	Permission	Start Date	End Date
No matches.			

RELEASE OF INFORMATION

TWO ROIs MUST BE ADDED.

- 1. Household Members:** If applicable, select all clients that the Release of Information applies to.
- 2. Provider:** "Search" to add a second ROI (see next slide).
 - **Parent Provider project:** YOUR AGENCY HERE
 - **Specific project client is served by:** YOUR AGENCY HERE – YOUR PROJECT HERE
- 3. Release Granted:** Y/N of if the client gave consent for their data to be shared in CMIS.
- 4. Start Date:** date of enrollment.
- 5. End Date:** three years after the Start Date, *unless stated otherwise in documentation.*
- 6. Documentation:** **Signed Statement from Client.**
- 7. Witness:** name or initials of intake person.

Release of Information

Release of Information - (23) Albertson, Alfred

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.

1 (6) Two Parent Family

(23) Albertson, Alfred

(25) Albertson, Alaina

(24) Brumley, Betsy

Release of Information Data

2 Provider * YOUR AGENCY HERE (4)

3 Release Granted * -Select- ▾

4 Start Date * 08 / 17 / 2023

5 End Date * / /

6 Documentation -Select- ▾

7 Witness

After clicking "Search" for the Provider...

- 1. In the **Provider Search Results**, use the plus button to select which specific project the client is being served by.
- 2. Any Selected projects from step 1 will appear in the **Provider Search Selected Results** with the Parent Provider, which is included by default.
- 3. **Exit** once all projects are Selected. On the main ROI page, you will see that an ROI will be made for both projects.

1

Provider Search

Search for Providers by using keywords from the Provider Name or Description.

Search Show Advanced Options

Search Clear

Provider Number

Enter or scan a Provider ID number to search for that Provider.

Provider ID # Submit

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
	Provider																	Level		Phone		Location					Last Updated
+	+	YOUR AGENCY HERE - YOUR PROJECT HERE (23)														Level 4	302-856-2246	Georgetown, DE 19947	08/16/2023								

Showing 1-1 of 1

Provider Search Selected Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
	Provider ID																										Last Updated
-	+	4	YOUR AGENCY HERE											Level 3	302-856-7524	Georgetown, DE 19947	08/16/2023										

Showing 1-1 of 1

Clear Selected Exit

2

Provider Search

Search for Providers by using keywords from the Provider Name or Description.

Search Show Advanced Options

Search Clear

Provider Number

Enter or scan a Provider ID number to search for that Provider.

Provider ID # Submit

Provider Search Results

No matches.

Provider Search Selected Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
	Provider ID																										Last Updated
-	+	4	YOUR AGENCY HERE											Level 3	302-856-7524	Georgetown, DE 19947	08/16/2023										
-	+	23	YOUR AGENCY HERE - YOUR PROJECT HERE											Level 4	302-856-2246	Georgetown, DE 19947	08/16/2023										

Showing 1-2 of 2

Clear Selected Exit

3

Release of Information

Release of Information - (23) Albertson, Alfred

Household Members

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

(6) Two Parent Family

- (23) Albertson, Alfred
- (25) Albertson, Alaina
- (24) Brumley, Betsy

Release of Information Data

Clicking 'Save Release of Information' will create a distinct Release of Information for each selected provider.

Provider *

- YOUR AGENCY HERE (4)
- YOUR AGENCY HERE - YOUR PROJECT HERE (23)

Search

Release Granted * -Select-

Start Date * 08 / 17 / 2023 📅

End Date * 📅

Documentation -Select-

Witness

Save Release of Information Cancel

HOW TO ADD A PROJECT ENTRY – ENTRY/EXIT

1. Navigate to the **Entry/Exit** tab
2. To create a new project entry, select **Add Entry/Exit**

The screenshot shows the 'Client Profile' page for 'Client - (13) Stark, Tony'. The 'Entry / Exit' tab is selected and highlighted with a red box, with a red '1' next to it. Below the tabs, a reminder message states: 'Reminder: Household members must be established on Households tab before creating Entry / Exits'. A table with columns 'Program', 'Type', 'Project Start Date', 'Exit Date', 'Interims', and 'Follow Client Ups Count' is shown, with 'No matches.' displayed below it. The 'Add Entry / Exit' button is highlighted with a red box and a red '2' next to it. Other buttons include 'Submit', 'Exit', and '-Switch to Another Household Member-'. The top navigation bar includes 'Clients > Client Profile', a search bar, and utility icons.

STARTING THE PROJECT ENTRY

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

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

Project Start Data - (13) Stark, Tony ✕

Household Members

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

1 (4) Two Parent Family

(13) Stark, Tony

(15) Potts, Pepper

(14) Stark, Morgan

Project Start Data - (13) Stark, Tony

2	Provider *	YOUR AGENCY HERE (4) ▼
3	Type *	-Select- ▼
4	Project Start Date *	08 / 02 / 2023 📅 🔄 📅 3 ▼ : 41 ▼ : 35 ▼ PM ▼

Save & Continue Cancel

i 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 *	YOUR AGENCY HERE - YOUR PROJECT HERE (23) ▼
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
  (23) Albertson, Alfred	Yes	 08/10/2023						
  (25) Albertson, Alaina	No	 08/10/2023						
  (24) Brumley, Betsy	No	 08/10/2023						

Include Additional Household Members Showing 1-3 of 3

Entry Assessment

Household Members

- (23) Albertson, Alfred
Age: Unknown
Veteran: Yes (HUD)
- (25) Albertson, Alaina
Age: Unknown
Veteran: No (HUD)
- (24) Brumley, Betsy
Age: Unknown
Veteran: No (HUD)

HUD CoC & ESG Entry All Other Projects (2021) - CoC Entry Date: 08/10/2023 10:45:25 AM 

Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>   
Date of Birth Data Quality	-Select- 
Primary Race	-Select- 
Secondary Race	-Select- 
Ethnicity	-Select- 
Gender	<input type="text"/> <ul style="list-style-type: none"> 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 
Relationship to Head of Household *	-Select- 
Client Location *	-Select- 
County *	-Select- 

[Clear All](#)

COMPLETING ENTRY ASSESSMENT

Notes:

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

ENTRY ASSESSMENT: PRIOR LIVING SITUATION

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

- 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	Place not meant for habitation (HUD) ▼ G
Length of Stay in Previous Place	-Select- ▼ G
Approximate date homelessness started:	___ / ___ / ___ [calendar icon] [refresh icon] [calendar icon] 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 *current, continuous* episode of literal homelessness

1 Income from Any Source -Select- G

A Monthly Income HUD Verification 

Monthly Amount	Source of Income	Start Date *	End Date
<input type="button" value="Add"/> <input type="button" value="View Gross Income"/>			

3 Total Monthly Income G

Non-cash benefit from any source -Select- G

B Non-Cash Benefits HUD Verification 

Source of Non-Cash Benefit	Start Date *	End Date	Amount of Non-Cash Benefit
<input type="button" value="Add"/>			

Covered by Health Insurance -Select- G

C Health Insurance HUD Verification 

Start Date *	Health Insurance Type	Covered?	End Date
<input type="button" value="Add"/>			

Does the client have a disabling condition? -Select- G

D Disabilities HUD Verification 

Disability Type
<input type="button" value="Add"/>

ENTRY ASSESSMENT: TWO-STEP DATA ELEMENTS

Important sections:

- A. **Income**
 - Also need to type in Total Monthly Income
- B. **Non-cash benefits**
- C. **Health Insurance**
- D. **Disabilities**

Two-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** will change to a **check mark** when completed

ENTRY ASSESSMENT: HUD VERIFICATION

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

NOTES:

- Selecting **“No”** from above **auto-fills** all unanswered 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, start date)

HUD Verification: Monthly Income for 08/10/2023

 Per Source of Income, the current records for Monthly Income as of 08/10/2023 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 08/10/2023, 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 checked="" type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
SSI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
TANF (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Save

Save & Exit

Exit

ENTRY ASSESSMENT: YES TO ANY INCOME

1. Type in **Monthly Amount**
 - A. Feel free to include any **Additional Comments** for better tracking
 - B. The **Start Date** is set to match the Project Start Date. For more accurate tracking, this date can be changed to when client started receiving income source.

Add Recordset ×

Monthly Income

1	Monthly Amount	<input type="text"/>	G
	Source of Income	SSI (HUD)	
	If Other, Please Specify	<input type="text"/>	G
	Receiving Income Source?	Yes	
A	Additional Comment	<input type="text"/>	G
B	Start Date *	08 / 10 / 2023	<input type="calendar"/> <input type="refresh"/> <input type="calendar"/> G
	End Date	<input type="text"/>	<input type="calendar"/> <input type="refresh"/> <input type="calendar"/> G

When client no longer receives this income source, **add an End Date** instead of deleting the entire record.

End Date should be the **day before** the next update.

UPDATING SUB-ASSESSMENT

Monthly Income

1 HUD Verification ✓

Monthly Amount	Source of Income	Start Date *	End Date
 	Child Support (HUD)	08/02/2023	
 	Other (HUD)	08/02/2023	
 	VA Service Connected Disability Compensation (HUD)	08/02/2023	
 	TANF (HUD)	08/02/2023	
 	Retirement Income From Social Security (HUD)	08/02/2023	

Add View Gross Income Showing 1-5 of 14 First Previous Next Last

HUD Verification: Monthly Income for 08/02/2023

Per Source of Income, the current records for Monthly Income as of 08/02/2023 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 08/02/2023, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Source of Income	Receiving Income Source?			
	Yes	No	Date 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"/>
 SSI (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"/>

Save Save & Exit Exit

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, which is important before adding any new entry

Edit Recordset - (13) Stark, Tony

Monthly Income

Monthly Amount	<input type="text"/>	G
Source of Income	SSI (HUD)	
If Other, Please Specify	<input type="text"/>	G
Receiving Income Source?	No	G
Additional Comment	<input type="text"/>	G
Start Date *	07 / 01 / 2023	G
End Date	08 / 01 / 2023	G

Print Recordset Save Cancel

HUD Verification: Monthly Income for 08/02/2023

Per Source of Income, the current records for Monthly Income as of 08/02/2023 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 08/02/2023, 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 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 checked="" 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

4

Add Recordset

Monthly Income

Monthly Amount 771

Source of Income SSI (HUD)

If Other, Please Specify

Receiving Income Source? Yes

Additional Comment

Start Date * 08 / 02 / 2023

End Date

Save Cancel

5

- 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 Amount** and **new Start Date**
 - Click Save, and Exit the HUD Verification window
- A new entry will be reflected on the table
 - If the income amount has changed, remember to **update the Total Monthly Income** field

Monthly Income HUD Verification

Monthly Amount	Source of Income	Start Date *	End Date
J\$771.00	SSI (HUD)	08/02/2023	
	Child Support (HUD)	07/01/2023	
	Other (HUD)	07/01/2023	
	VA Service Connected Disability Compensation (HUD)	07/01/2023	
	TANF (HUD)	07/01/2023	

Add View Gross Income Showing 1-5 of 15 First Previous Next Last

Total Monthly Income 771

6

Monthly Income

HUD Verification

Monthly Amount	Source of Income	Start Date*	End Date
US\$771.00	SSI (HUD)	08/02/2023	
	Child Support (HUD)	07/01/2023	
	Other (HUD)	07/01/2023	
	VA Service Connected Disability Compensation (HUD)	07/01/2023	
	TANF (HUD)	07/01/2023	

Add View Gross Income Showing 1-5 of 15 First Previous Next Last

Total Monthly Income 771 ^G

Non-cash benefit from any source -Select- ^G

Non-Cash Benefits

HUD Verification

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

Add

COMPLETING HUD VERIFICATION AND ENTRY ASSESSMENT

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

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

HOUSEHOLD DATA SHARING

- When updating entry assessments for a household, some data can be shared from the Head of Household to other Household Members.
- Use the **Household Data Sharing** to select which Household Members share the same:
 - County/Location
 - Prior Living Situation
 - Length of Time Homeless
 - Housing Move-In Date
- **DATA ENTRY TIP:** This is helpful for households with minors, or those who live at the same place. For couples/groups of adults that may have been separated, ask each person for their response.

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 * YOUR AGENCY HERE - YOUR PROJECT HERE (23) Search My Provider Clear

Type *

Household Data Sharing

Household Members

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

(3) Other

(1) Parker, Peter

(12) Parker, May

Household Data Sharing Date: 07/28/2023 01:16:20 PM

Client Location *	DE-500 G
County *	Sussex G
Prior Living Situation	Place not meant for habitation (HUD) G
Length of Stay in Previous Place	One month or more, but less than 90 days G
Approximate date homelessness started:	06 / 01 / 2023 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	Two times (HUD) G
Total number of months homeless on the street or ES in the past three years	4 G
Housing Move-in Date	/ / G

Save Save & Exit Exit

1 Add Household Data

2 Include Additional Household Members

3 Household Data Sharing

COMPLETED PROJECT ENTRY

Review the following:

- **Program** is the specific project serving the client(s)
- **Entry Date** is accurate
- **Type** is HUD, unless trained otherwise
- **Client Count** is accurate

Clients > Client Profile Type here for Global Search    

Client - (13) Stark, Tony 

(13) Stark, Tony

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

 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
 YOUR AGENCY HERE - YOUR PROJECT HERE (23)	HUD	 08/02/2023 				  2 

Add Entry / Exit Showing 1-1 of 1

Exit

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.

The screenshot shows a web interface for a client profile. At the top, there is a breadcrumb 'Clients > Client Profile' and a search bar with the text 'Type here for Global Search'. Below this, the client's name is 'Client - (13) Stark, Tony'. There is a 'Release of Information: None' status and a button to '-Switch to Another Household Member-' with a 'Submit' button. The main content area has two tabs: 'Client Information' and 'Service Transactions'. Under 'Client Information', there are sub-tabs: 'Summary', 'Client Profile', 'Households', 'ROI', 'Entry / Exit', 'Case Managers', and 'Case Plans'. The 'Case Managers' tab is selected and highlighted with a red box, with a red '1' next to it. Below the tabs, there is a table with columns: 'Name', 'Provider', 'Phone Number', 'Start Date', and 'End Date'. The table is currently empty, showing 'No matches.' A red '2' is next to the 'Add Case Manager' button, which is also highlighted with a red box. An 'Exit' button is located at the bottom right of the table area.

ADDING A CASE MANAGER

1. Select the household member(s) working with the Case Manager
2. Select:
 - **Select User** from the drop-down for someone in your organization.
 - **Other**, then fill out contact information, if Case Manager is not a CMIS user.
3. Click **Add Case Manager**

Case Manager ×

Case Manager - (13) Stark, Tony

▼ Household Members

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

1 (7) Two Parent Family

- (13) Stark, Tony
- (15) Potts, Pepper
- (14) Stark, Morgan

2

Type *	<input checked="" type="radio"/> Community Services User <input type="radio"/> Me <input type="radio"/> Other B
Select User *	YOUR AGENCY HERE (4) ▼ -Select- ▼ A
Name *	<input type="text"/>
Title	<input type="text"/>
Phone Number	<input type="text"/>
Email Address	<input type="text"/>
Provider *	YOUR AGENCY HERE (4) ▼
Start Date *	08 / 17 / 2023 <input type="text"/> <input type="text"/> <input type="text"/>
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>

3

Add Case Manager

Cancel

HOW TO ADD SERVICE TRANSACTIONS

1. On client's file, navigate to the **Service Transactions** tab.
2. On the Service Transaction Dashboard, select **Add Service**.

USED BY:

- Rapid Re-Housing
- Diversion
- Homelessness Prevention
- Veteran-dedicated providers

The screenshot displays a web interface for a client profile. At the top, there is a breadcrumb trail 'Clients > Client Profile' and a search bar with the placeholder text 'Type here for Global Search'. Below this, the client's name '(13) Stark, Tony' is shown, along with a 'Release of Information: None' status and a '-Switch to Another Household Member-' dropdown menu with a 'Submit' button. The main content area is divided into two tabs: 'Client Information' and 'Service Transactions', with the latter being selected and highlighted by a red box and the number '1'. Below the tabs is the 'Service Transaction Dashboard', which contains several action buttons: 'Add Need', 'Add Service' (circled in red and labeled with a '2'), '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 member(s) working with the Case Manager
2. Select specific Service Provider
3. If not in Back Date Mode, adjust Start and End Date
 - Please note adding Service Transactions while not in Back Date Mode may lead to reporting errors.

Clients > Client Profile Type here for Global Search    

Client - (13) Stark, Tony 

(13) Stark, Tony
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.

1 (4) Two Parent Family

(13) Stark, Tony (Primary Client)

(15) Potts, Pepper

(14) Stark, Morgan

2 **Service Provider *** YOUR AGENCY HERE (4) ▾

Creating User TRAINING LOGIN

3 **Start Date *** 08 / 03 / 2023    12 : 26 : 45 PM ▾

End Date 08 / 03 / 2023    12 : 26 : 45 PM ▾

Service Type * -Select- ▾ Look Up

Provider Specific Service -Select- ▾

Save & Continue Cancel

Clients > Client Profile Type here for Global Search    

Client - (13) Stark, Tony 

(13) Stark, Tony

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.

(4) Two Parent Family

(13) Stark, Tony (Primary Client)

(15) Potts, Pepper

(14) Stark, Morgan

Service Provider *	YOUR AGENCY HERE (4) 
Creating User	TRAINING LOGIN
Start Date *	08 / 03 / 2023    12 : 26 : 45 PM 
End Date	08 / 03 / 2023    12 : 26 : 45 PM 
Service Type *	-Select-  Look Up
Provider Specific Service	-Select- 

4 **5** **Save & Continue** **Cancel**

ADDING A SERVICE TRANSACTION

1. Select applicable **Service Type**
 - Options differ by **Service Provider**
2. Click on **Save & Continue**

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

- Change Service Provider
- Contact HAD to update options

ADDING CASE NOTES

- Add **Service Notes** as needed.
- Click Save & Exit once completed.
- Service Transaction history can be located using the path: Service Transactions > View all Service Transactions > Services

Service Provider *	YOUR AGENCY HERE (4)
Creating User	TRAINING LOGIN
Start Date *	08 / 03 / 2023 12 : 26 : 45 PM
End Date	08 / 03 / 2023 12 : 26 : 45 PM
Service Type *	At Risk/Homeless Housing Related Assistance Programs (BH-0500)
Provider Specific Service	-Select- ▾
Service Notes	<input type="text"/>

Clients > Client Profile

Client - (13) Stark, Tony

(13) Stark, Tony
Release of Information: None -Switch to Another Household Member- ▾

Client Information Service Transactions

Needs Services Referrals Shelter Stays Entire Service History

Previous Services

Select Dates Start Date End Date

-Select- ▾ / / / / / /

Service Start Date	Service End Date	Provider of Service	Service Provided
08/03/2023	08/03/2023	YOUR AGENCY HERE	Yes

Showing 1-1 of 1

INTERIMS: WHEN TO ADD AN UPDATE

For each life change in any of the following categories:

- Income
- Benefits
- Health insurance
- Housing Move-In Date
- PATH status (PATH)

Where to locate it:

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

The screenshot shows a web interface for a client profile. At the top, there is a breadcrumb 'Clients > Client Profile' and a search bar. The client name is '(13) Stark, Tony'. Below this, there are tabs for 'Client Information' and 'Service Transactions'. Under 'Client Information', there are sub-tabs: 'Summary', 'Client Profile', 'Households', 'ROI', 'Entry / Exit', 'Case Managers', and 'Case Plans'. The 'Entry / Exit' tab is active. A reminder message states: 'Reminder: Household members must be established on Households tab before creating Entry / Exits'. Below the reminder is a table with the following columns: Program, Type, Project Start Date, Exit Date, Interims, and Follow Client Ups Count. The table contains one row: 'YOUR AGENCY HERE - YOUR PROJECT HERE (23)', 'HUD', '08/02/2023', and '1'. The 'Interims' column value '1' is highlighted with a red box. Below the table is an 'Add Entry / Exit' button and a status 'Showing 1-1 of 1'. An 'Exit' button is at the bottom right.

Program	Type	Project Start Date	Exit Date	Interims	Follow Client Ups Count
YOUR AGENCY HERE - YOUR PROJECT HERE (23)	HUD	08/02/2023		1	

Interim Reviews



Interim Reviews Associated with this Entry / Exit

Review Date

Review Type

Client Count

Add Interim Review

No matches.

Exit

2

2. Click on Add Interim Review

3. Confirm details

- Select Interim Review Type - Update
- Reflect when change occurred on Review Date
 - Back Date Mode can be used for this step
- Save & Continue

4. Make any necessary changes

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

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Add Interim Review - (13) Stark, Tony



Household Members

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

(4) Two Parent Family

(13) Stark, Tony (Entry Date: 08/02/2023 3:41 PM)

(14) Stark, Morgan (Entry Date: 08/02/2023 3:41 PM)

Interim Review Data

Entry / Exit Provider YOUR AGENCY HERE - YOUR PROJECT HERE (23)

Entry / Exit Type HUD

Interim Review Type * -Select-

Review Date * 08 / 03 / 2023 12 : 41 : 56 PM

Save & Continue

Cancel

3

Entry / Exit Interim Review



Interim Review Data

Entry / Exit Provider YOUR AGENCY HERE - YOUR PROJECT HERE (23)

Entry / Exit Type HUD

Interim Review Type Update

Review Date 08/03/2023 12:41:56 PM

Interim Review Assessment

Household Members

(13) Stark, Tony

Age: Unknown

Veteran: No (HUD)

(14) Stark, Morgan

Age: Unknown

Veteran: No (HUD)

HUD CoC & ESG Update (2021)

Interim Review Date: 08/03/2023 12:41:56 PM

Client Location * DE-500 G

Housing Move-in Date / /

Income from Any Source -Select- G

Monthly Income HUD Verification

Monthly Amount	Source of Income	Start Date *	End Date
US\$771.00	SSI (HUD)	08/02/2023	
	Child Support (HUD)	07/01/2023	
	Other (HUD)	07/01/2023	
	VA Service Connected Disability Compensation (HUD)	07/01/2023	
	TANF (HUD)	07/01/2023	

Add View Gross Income Showing 1-5 of 15 First Previous Next Last

Total Monthly Income 771 G

Non-cash benefit from any source -Select- G

4

ADDING A HOUSING MOVE-IN DATE

- Add HMID when client ***physically* moves into their housing unit**
 - Repeat this step for each household member
- Add **through an Interim**
 - HMID should be blank on entry assessment
- It is possible that intake and Housing Move-In Date are the same

Interim Review Assessment

Household Members

<input checked="" type="checkbox"/>	(13) Stark, Tony
	Age: Unknown
	Veteran: No (HUD)
<input checked="" type="checkbox"/>	(14) Stark, Morgan
	Age: Unknown
	Veteran: No (HUD)

HUD CoC & ESG Update (2021) Interim Review Date: 08/03/2023 12:41:56 PM

Client Location * DE-500 G

Housing Move-in Date G

Income from Any Source -Select- 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 life changes, if any
 - Income
 - Non-cash benefits
 - Insurance
 - Disabling Condition

Add Interim Review - (13) Stark, Tony

Household Members

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

(4) Two Parent Family

(13) Stark, Tony (Entry Date: 08/02/2023 3:41 PM)

(14) Stark, Morgan (Entry Date: 08/02/2023 3:41 PM)

Interim Review Data

Entry / Exit Provider	YOUR AGENCY HERE - YOUR PROJECT HERE (23)
Entry / Exit Type	HUD
Interim Review Type *	-Select- 30-Day Review 60-Day Review 90-Day Review 120-Day Review Annual Assessment Update
Review Date *	12 : 51 : 01 PM

Save & Continue Cancel

WHAT A COMPLETED INTERIM LOOKS LIKE

Interim Reviews ×

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
08/03/2023	Update	

[Add Interim Review](#) Showing 1

Client Information Service Transactions

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

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
YOUR AGENCY HERE - YOUR PROJECT HERE (23)	HUD	08/02/2023		1		2

[Add Entry / Exit](#) Showing 1-1 of 1

[Exit](#)



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
- The project exit should be added in CMIS **within three business days** of occurrence

Where to locate it:

1. On client's Entry/Exit tab, click on [icon next to Exit Date](#).

Clients > Client Profile

Type here for Global Search

Client - (13) Stark, Tony

(13) Stark, Tony

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

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
YOUR AGENCY HERE - YOUR PROJECT HERE (23)	HUD	08/02/2023				

Add Entry / Exit

Showing 1-1 of 1

Exit

HOW TO ADD A PROJECT EXIT

1. Select all **Household Members** exiting
2. Reflect when client left on **Exit Date**
3. Select closest **Reason for Leaving**
4. Select **Destination**
 - What is the client's living situation upon project exit?
5. Add Notes
6. Once complete, click **Save & Continue**

Edit Exit Data - (13) Stark, Tony

Household Members

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

1 (4) Two Parent Family
 (13) Stark, Tony
 (14) Stark, Morgan

Edit Exit Data - (13) Stark, Tony

2	Exit Date *	08 / 03 / 2023			12	:	55	:	21	PM
3	Reason for Leaving	-Select-								
	If "Other", Specify									
4	Destination *	-Select-								
	If "Other", Specify									
5	Notes									

6 Save & Continue Cancel

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

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 * YOUR AGENCY HERE - YOUR PROJECT HERE (23) ▼

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
(13) Stark, Tony	Yes	08/02/2023	08/03/2023			Completed program	Place not meant for habitation (HUD)	
(14) Stark, Morgan	No	08/02/2023	08/03/2023			Completed program	Place not meant for habitation (HUD)	

Include Additional Household Members Showing 1-2 of 2

Entry Assessment

Exit Assessment

Household Members

- (13) Stark, Tony
Age: Unknown
Veteran: No (HUD)
- (14) Stark, Morgan
Age: Unknown
Veteran: No (HUD)

HUD CoC & ESG Exit (2021)

Exit Date: 08/03/2023 12:55:21 PM

Income from Any Source Yes (HUD) ▼ G

Monthly Income HUD Verification ✓

Monthly Amount	Source of Income	Start Date *	End Date
US\$771.00	SSI (HUD)	08/02/2023	

WHAT A COMPLETED PROJECT EXIT LOOKS LIKE

Clients > Client Profile Type here for Global Search    

Client - (13) Stark, Tony 

(13) Stark, Tony

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

Client Information Service Transactions

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

 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
 YOUR AGENCY HERE - YOUR PROJECT HERE (23)	HUD	 08/02/2023	 08/03/2023			 

 Showing 1-1 of 1 



HOUSING
ALLIANCE
DELAWARE

THIS CONCLUDES THE CLIENT MODULE TRAINING POWERPOINT.

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