# **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

Where to find it?	What to do?	How to know?	How to end?
On the upper right corner, select "Back Date Mode"	Adjust the date and time, then click on "Set Back Date"	If activated, the top bar will be light green	To leave Back Date Mode, click on the exit button next to it





## **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 #

0 Last Viewed		Clients > (	Client Search						Tune here for Clobel Coareb		+ 0
									Type here for Global Search		
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Home						Please Search the System	m before adding a New C	lient.			
		Name		First	Middle	Last park	Suffix				
Clients		Name Data (	Quality	-Select-	v	- <u> </u>					
Resources		Alias	200/19								
Shelters		Social Secur	ity Number								
Reports	•	Social Secur	rity Number Data Quality	-Select-	~						
Admin	•	U.S. Military	Veteran?	-Select-	~						
		Exact Match	l.								
		Search	Clear Add N	New Client With This Informat	ion Add And	onymous Client					
с	collapse <	Client Number	r								
		Enter or scan a C	lient ID number to go directly to	that Client's profile. Submit							
	⇒	Client Results									
		ID	Name 🔺			Social Se	ecurity Number	Date of Birth	Alias	Gender Banned Co	ousehold ount
		1	Parker, Peter			-0000		10/08/2001		1	Q
		× 👫 11	Parkington, Peter			564-32-34	154			0	Q
								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 <u>cmis.support@housingalliancede.org</u> 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 he	ere for Global Search	🍌 🛧 🕄
lient Search							
		🚺 Ple	ase Search the System before a	lding 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	0						
Search Clear	Add New Client With This Info	rmation	Add Anonymous Client				
ient Number							
er or scan a Client ID number to go dire	ectly to that Client's profile						
ent ID #	Submit						
ient Deculte							
inche recourto							. Laure de dat
			Social Security Nun	ber	Date of Birth	Alias	Gender Banned Count
ID Name 🔺			· · · · · · · · · · · · · · · · · · ·				Count

## **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

3

	Add	New (	Client	t Inform	ation						>	<
	You pos:	u are abo sible mat	out to a tches	add a New before coi	v Client to ntinuing f	o the this p	system	n (Be su ). Conti	ire to look nue with	through Add Nev	n all the v Client?	
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			Add Ne	w Client Info	rmation					×		
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		١	Nould you	ı like to:								
			Ad	d Client ONLY	Add Cl	lient and House	d Add NEW hold	Add Cli	ient and SEARC Jouseholds	н		
Clients > Client ent - (13) Stark (13) Stark, Tony Release of informatio	t Profile , Tony a: None								Cance	rpe here for Global S	earch	_ <b>ē \$, ★ 9</b> ∂
ent Information		Ŷ		Y	Ŷ		Service Transactio	ns	Ť		Ť	
Summary dded to the syste	em 08/02/2023 0	Client Profile 2:31 PM		Households	ROI			Entry / Exit	Case	Managers	Case Plan	
Name Date of Birth Gender Primary Rad Secondary R	Stark, T h ce Race	ony				Socia U.S. N Veter	al Security -24 Vilitary an? No	168 (HUD)				8
Release of Info	rmation						Entry/Exits					
Provider			Permiss	sion Start Date	End Date	F	Program		Туре		Project Start Date	Exit Date
Add ROI				No matches.			Add Entry / Exit			No matches.		
Households							Services					
ID Type				Head of Household	Relationship		Start Date		End Date		Provider	
Search Exist	ting Households	Start New Ho	ousehold				Add Service	Add Multiple		No matches.		
Outstanding In	coming Referrals											
Referral Date		Referring Pro	vider	Ν	leed Type							
Add Referra	al			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

Client - (13) Stark, Tony							ð
(13) Stark, Tony Release of Information: None							
Client Information				Service Transact	tions		
Summary	Client Profile	Households	ROI		Entry / Exit	Case Managers	Case Plans

## **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, A	lfred								ć
(23) Albertson, Alfred Release of Information: None									
Client Information				Service Trans	actions				
Summary	Client Profile	Households	ROI		Entry / Exit	Case Mana	agers	Case Plans	
Added to the system 08/1	7/2023 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				Entry/Exits					
Provider	Per	nission Start Date End	d Date	Program		Туре	Projec	t Start Date	Exit Date
Add ROI		No matches.		Add Entry	/ Exit		No matches.		
Households				Services					
ID Type		Head of Household Relatio	onship	Start Date		End Date	Ρ	rovider	
Search Existing Hou	seholds Start New Household			Add Servic	e Add Multiple		No matches.		
Outstanding Incoming I	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		J					

#### 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.

Deferred To Dravider VOUD AOENOV UEDE (4)

#### Referral Data

noroned to the naci	TOOR AGENOT HERE	- (4)				
Needs Referral Date *	07 / 28 / 2023	🛗 🖯 🖬 1 🕶 :	00 🗸 : 31 🗸 PM 🗸			
Referral Ranking	-Select- 🗸			m		
Referral Outcome	-Select-	$\rightarrow$	Referral Outcome	Declined	~	
		-	If Canceled or Dec	clined, Reason	-Select-	~
		- <mark>Follow U</mark> Proje Date		//	-Select- Client Not Eligible Client Refused Service Client Was a No-Show Service Does Not Exist	
			Follow Up User	YOUR AGE	Service Not Acces Unknown	sible

## 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 Glob	al Search	🗖 🖶 🏚 🖈	?
Cli	ent - (23) Albertson, Alfre	d							ð
	(23) Albertson, Alfred Release of Information: None								
Clie	ent Information				Service T	ransactions			
S	ummary Client	Profile	Households	ROI		Entry / Exit	Case Managers	Case Plans	
(	Client Record						Issue ID Card		]
	Name	Albertson, Alf	fred						
	Name Data Quality	Full Name Re	ported						
	Alias								
	Social Security	0001						Change Clear	
	SSN Data Quality	Approximate	or partial SSN reported (	(HUD)					
	U.S. Military Veteran?	Yes (HUD)							
	Age								
(	Client Demographics								ð
	Date of Birth								
	Date of Birth Data Quality								
	Gender								
	Primary Race								
	Secondary Race								
	Ethnicity								

ents > Client Profile					Type here fo	or Global Search	🖶 🏟 🛪 🕄
- (13) Stark, Tony							ධ
Stark, Tony ase of Information: None							
nformation				Service Trar	isactions		
mary	Client Profile	Households	ROI		Entry / Exit	Case Managers	Case Plans
Client Record Name Name Data Quality Alias Social Security SSN Data Quality	Stark, Tony Full Name Reported 2468 Approximate or partic	al SSN reported (HUD)				Issue ID Card	Change Clear
U.S. Military Veteran? Age	? No (HUD)						
Client Demographics							ð
Date of Birth							
Date of <mark>B</mark> irth Data Quality							
Gender							
Primary Race							
o							
Secondary Race							

- 1. To edit client's information, click on the pencil icon
  - Complete/Update as many fields as possible
- 2. CLIENT RECORD

1

- 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



A Editing t	the Client Demographic Information could affect the Unique ID and the Client Search.	
lient Demographics		
Date of Birth	/ / 🗰 🔁 🖬 G	
Date of Birth Data Quality	-Select- v G	
Gender	Female Male A gender other than singularly female or male (e.g., non-binary, genderfluid, agender, culturally specific gend Transgender Questioning	er)
	Client doesn't know Client refused Data not collected Clear A	JI
Primary Race	Client doesn't know Client refused Data not collected -Select- • G	JI
Primary Race Secondary Race	Client doesn't know Client refused Data not collected -Select- • 6 -Select- • 6	JI

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# **HOUSEHOLDS TAB**

Need to **CREATE** a Household? <u>CLICK HERE</u>.

Need to **MANAGE** a Household? <u>CLICK HERE</u>.

## 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"

Profile				Type here for Glo	bal Search	
, Tony						Ć
n: None						
			Service Tr	ansactions		
Client Profile	1 Households	ROI		Entry / Exit	Case Managers	Case Plans
2	i This Clien	t is not current	y a member o	f any Households.		
useholds						
a Housebolds	Start New Household	2				Fxit
	Profile       , Tony       n: None       Client Profile       2       useholds	Profile       , Tony       n: None       Client Profile       2       i) This Client       useholds	Profile       , Tony       n: None       Client Profile       2       i This Client is not current       useholds	Profile       , Tony       n: None       Client Profile       1       Households       ROI       i       This Client is not currently a member or useholds		Profile     Type here for Global Search       , Tony       n: None       Client Profile       Q       I Households       ROI       Entry / Exit       Case Managers       Q       This Client is not currently a member of any Households.

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## 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  $\rightarrow$ 

Household Type *	-Select-	~			
Client Search					
		i Please Search the Sys	stem before adding a Ne	w Client. Hid	e Advanced Search
Name	First	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					
Search Clea	r Add N	ew Client With This Informa	tion Add Ano	nymous Client	
Client Number		Housebold			
Client Number	d that Client to this				
Client Number Enter or Scan a Client ID to ac Client ID #	dd that Client to this	Submit			
Client Number Enter or Scan a Client ID to ac Client ID #	dd that Client to this	Submit			
Client Number Enter or Scan a Client ID to ac Client ID # Selected Clients	dd that Client to this	Submit			
Client Number Enter or Scan a Client ID to ac Client ID # Selected Clients ID Name	dd that Client to this	Submit Ecurity Date of Birth	Alias	Ge	ender Banned Housel Count
Client Number Enter or Scan a Client ID to au Client ID # Selected Clients ID Name 13 Stark, Tony	dd that Client to this Social Se Number 2468	Submit Ecurity Date of Birth	Alias	Ge	ender Banned Housel Count 0 <b>Q</b>

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Client Search				
	0	Please Search the Syster	n before adding a New Client	Hide Advanced Search
News	First	Middle	Last	Suffix
Name	Morgan		Stark	
Name Data ( uality	-Select-	~		
Alias				
Social Security Number				
Social Security Number Data Quility	-Select-	~		
U.S. Military Veteran?	-Select-	~		
Exact Match				
Client Number Enter or Scan a Client ID to a	dd that Client to this House	ehold.		
Client Number Enter or Scan a Client ID to a Client ID #	dd that Client to this House	ehold. it		
Client Number Enter or Scan a Client ID to a Client ID #	dd that Client to this House	ehold. it		
Client Number Enter or Scan a Client ID to a Client ID # Client Results ID Name	dd that Client to this House Subm	ahold. it Date of Birth	Alias	Gender Banned Hous Count
Client Number Enter or Scan a Client ID to a Client ID # Client Results ID Name Stacy, Gwen	dd that Client to this House Subm Social Security Number 0911	ehold. it Date of Birth 03/06/2002	Alias	Gender Banned Hous Count
Client Number Enter or Scan a Client ID to a Client ID # Client Results ID Name Stacy, Gwen	dd that Client to this House Subm Social Security Number 0911	bold. it Date of Birth 03/06/2002	Alias Showing 1-1 of 1	Gender Banned Hous Count Count 0 C
Client Number Enter or Scan a Client ID to a Client ID # Client Results ID Name Stacy, Gwen Selected Clients	3 dd that Client to this House Subm Social Security Number 0911	ehold. it Date of Birth 03/06/2002	Alias Showing 1-1 of 1	Gender Banned Hous Count 0 C
Client Number Enter or Scan a Client ID to a Client ID # Client Results ID Name Selected Clients ID Name	3 dd that Client to this House Social Security Number 0911 Social Security Number	ahold. it Date of Birth 03/06/2002 Date of Birth	Alias Showing 1-1 of 1 Alias	Gender Banned Hous © 0 Count Gender Banned Hous Count
Client Number Enter or Scan a Client ID to a Client ID # Client Results ID Name Selected Clients ID Name 13 Stark, Tony	3 dd that Client to this House Social Security Number 0911 Social Security Number 2468	ehold. it Date of Birth 03/06/2002 Date of Birth Date of Birth	Alias Showing 1-1 of 1 Alias	Gender Banned Hous Count Count Gender Banned Hous Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Count Coun

## 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 Client II	Scan a Client ID	to add that Client to this Househol Submit	d.			
Client	Results					
ID I	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
				No matches.		
Selec	ted Clients					
ID	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
	Stacy, Gwen	0911	03/06/2002			0 <b>Q</b>
<b>2</b> 13	Stark, Tony	-2468				0 Q
				Showing 1-2 of 2		
				3	Continue	ancel



## 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

#### Individual Client Assessment

Household M

(13) Stark Self, Age: U (14) Stark,

daughter, Ag

## 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
- Navigate to other client(s) through Household Members section

embers	Client Record	Issue ID Card	ð
<b>, Tony</b> nknown Morgan ge: Unknown	Name Name Data Quality Alias	Stark, Tony Full Name Reported	
3	Social Security SSN Data Quality U.S. Military Veteran? Age	2468 Approximate or partial SSN reported (HUD) No (HUD)	1
	HUD PII-UDEs (Households Ta	ab)	ô
	Date of Birth	// İİİ Ö 🖬 G	
	Date of Birth Data Quality Primary Race	-Select- 6 -Select- 6	
	Secondary Race	-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	G
	Does the client have a disabling condition?	-Select- G	
	Q Disabilities	HUD Verification	A
	Disability Type		
	Add		2

## HOW TO ADD MEMBERS TO AN EXISTING HOUSEHOLD

- 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.

Clients > Client Profile						Type here f	or Global Sea	arch	-	h 🛧 🕄
Client - (13) Stark, Tony										6
(13) Stark, Tony										
Release of Information: None						-	Switch to An	other Househol	d Member- 🗸	Submit
Client Information		1		Service Trans	sactions					
Summary	Client Profile	Households	ROI		Entry / Exit		Case Mana	agers	Case Plan:	5
▼ (4) Male Single Parer	nt									
Name					Age Head of Household	Relations of House	hip to Head hold	Joined I Household	Previous Associations	Household Count
(13) Stark, Tony					Yes	Self		08/02/2023	o Q	1 Q
2 (14) Stark, Morgan					No	daughter		08/02/2023	o Q	1 Q
Manage Household										
Previous Households	3									
Search Existing House	eholds Start New Hou	usehold								Exit

#### **ADDING CLIENTS TO** EXISTING HOUSEHOLDS

#### <u>PHOTO # 1</u>

- Adjust response to Household Type
- Select Add/Delete Household Members

#### <u>PHOTO # 2</u>

Click on Add Clients to the Household to reveal search feature

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

рното	Househ	old Information - (	4) Male Single Parer	nt												•
#1	📋 (4) M	ale Single Parent									Save		Save	& Exit		Exit
1	House	ehold Type *	Two Parent Family	~												
	Incor	ne	05\$0.00 monthly (05\$0.0													
	Clien	t Count	2													
	Househo	ld Members														
	Name				Age	Head House	of ehold	Relationship t of Household	to Head I	Joined	House	hold *		Previ Asso	ous ciations	Household Count
	😑 (13) St	tark, Tony				Yes	*	Self	*	08 /	02 / 2	023		0 (	<u>م</u>	1 <b>Q</b>
	😑 (14) St	tark, Morgan				No	~	daughter	~	08 /	02 / 2	023	<b>.</b>	0 (	2	1 Q
2	Add/De	elete Household Memb	ers										Ho	ouseh	old Histo	ory Report
DHOTO		Add/Delete Ho	ousehold Member	rs - (4) Male Singl	e Parent											×
# 2		Household Mem	pers													
		Name			Age Head Hous	l of sehold	Rel of I	lationship to Household	Head	Joineo House	l hold	Prev Asso	ious ociations	Ho Co	useholo unt	t
		📋 (13) Stark, Ton	/		Yes		Sel	lf		08/02	/2023	0	Q	1	Q	
		14) Stark, Mor	gan		No		dau	ughter		08/02	/2023	0	Q	1	Q	
		<ul> <li>Previous Hous</li> </ul>	ehold Members													
				i This Househ	old does not h	ave any	/ prev	vious member	'S.							
	3	Add Clients to	the Household													
											Contin	ue		Car	icel	

Household Members									
Name			Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Hou Cou	usehold unt
(13) Stark, Tony				Yes	Self	08/02/2023	0 Q	1	Q
(14) Stark, Morgan				No	daughter	08/02/2023	0 Q	1	Q
Previous Household Men	nbers	This Ho	usehold does	not have any	previous members.				
		•							
Add Clients to the House	hold								
Add Clients to the House	hold	i Ple	ase Search th	e System be	efore adding a New Clie	nt. F	lide Advanced	Sear	ch
Add Clients to the Housef	First Pepper	1 Ple	ase Search th Middle	e System be	efore adding a New Cliei Last Potts	nt. F	iide Advanced	Sear	ch
Add Clients to the Housed Client Search Name Name Data Quality	First Pepper -Select-	1 Ple	ase Search th Middle	e System be	efore adding a New Cliet Last Potts	nt. F	iide Advanced	Sean	ch
Add Clients to the Housed Client Search Name Name Data Quality Alias	First Pepper -Select-	1 Ple	ase Search th Middle	e System be	efore adding a New Clier Last Potts	nt. F	iide Advanced	Sear	ch
Add Clients to the Housed Client Search Name Name Data Quality Alias Social Security Number	First Pepper -Select-	Ple	ase Search th Middle	e System be	efore adding a New Clien Last Potts	nt. F	lide Advanced	Sear	ch
Add Clients to the Housel Client Search Name Name Data Quality Alias Social Security Number Social Security Number Data Quality	First Pepper -Select- -Select-	• Ple	ase Search th	e System be	efore adding a New Clie Last Potts	nt. F	lide Advanced	Sean	ch
Add Clients to the Housel Client Search Name Name Data Quality Alias Social Security Number Data Quality Number Data Quality Veteran?	Pirst Pepper -SelectSelectSelect-	• Ple	ase Search th Middle	e System be ✓	efore adding a New Clie Last Potts	nt. F	lide Advanced	Sear	ch

- 1. Use **Client Search** to check if a profile already exists
- 2. Client Results

1

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

Clien	nt Search							
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### 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



## HOW TO ADD A RELEASE OF INFORMATION (ROI)

- On the client's profile, navigate to the **ROI** tab
- 2. Select Add Release of Information

lient - (13) Stark, <sup>-</sup>	Tony						
(13) Stark, Tony Release of Information	: None				-Switch	to Another Household N	Nember- 🗸 🛛 Sub
ient Information				Service Transactio	ons		
Summary	Client Profile	Households	1 ROI	Entry	/ Exit	Case Managers	Case Plans
Release of Inform Provider	nation			Permission	Start Date	End D	late
Add Belease o	of Information			Norr	atches		

## **RELEASE OF INFORMATION**

elease of informatio	n - (23) Albertson, Alfred
Household Members	
To include House	hold members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.
(6) Two Parent Fam	ily
(23) Albertson, A	lfred
□ <u>(25)</u> Albertson, A	Alaina
□ <u>(24) Brumley, Be</u>	<u>tsy</u>
Release of Information I	Data
Provider *	YOUR AGENCY HERE (4) Search My Provider Clear
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Save Release of Information

Cancel

## TWO ROIS MUST BE ADDED.

- . 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
- 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.

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.
- Any Selected projects from step 1 will appear in the Provider Search Selected Results with the Parent Provider, which is included by default.
- Exit once all projects are Selected.
   On the main ROI page, you will see that an ROI will be made for both projects.

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# HOW TO ADD A PROJECT ENTRY – ENTRY/EXIT

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

			Type here for or		
īony					
None			-Swite	ch to Another Househol	ld Member- 🗸 Subr
		Ser	vice Transactions		
Client Profile	Households	ROI	1 Entry / Exit	Case Managers	Case Plans
i Remin	der: Household members	s must be established	on Households tab before crea	ting Entry / Exits	
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#### **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.

	5		
i To include Hou	sehold members for this Entry / Ex	xit, click the box beside each nam may be selected.	ne. Only members from the SAME Househ
🗌 (4) Two Parent F	amily		
(13) Stark, To	ny		
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Project Start Data -	organ 13) Stark, Tony		
Provident	YOUR AGENCY	HERE (4)	~
Provider *			
Type *	-Select-	~	

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.

	Provid	der*	YOUR AGENCY HE	RE - YOUR PROJECT HERE (23) 🗸	
	Туре	*	HUD	~	
			Update		
н	ouseh	old Members Associated with th	is Entry / Exit		
		Name	Head of Household	Project Start Date Exit Date Date Interims Ups Follow Reason for Leaving	Destination Notes
9	0	(23) Albertson, Alfred	Yes	✓ 08/10/2023	
ð	0	(25) Albertson, Alaina	No	✓ 08/10/2023	
ð	0	(24) Brumley, Betsy	No	♪ 08/10/2023	
	Includ	de Additional Household Membe	rs	Showing 1-3 of 3	
Er	ntry As	ssessment			
(+	lousel (23 Age Vete (25) Age	hold Members <b>Albertson, Alfred</b> <b>::</b> Unknown eran: Yes (HUD) ) Albertson, Alaina <b>::</b> Unknown	HUD CoC & ESG Entry All Oth Date of Birth Date of Birth Data Quality	er Projects (2021) - CoC Entry Date:	08/10/2023 10:45:25 AM 🔒
	(23 Age Vete (25) Age Vete (24) Age	hold Members ) Albertson, Alfred :: Unknown eran: Yes (HUD) ) Albertson, Alaina :: Unknown eran: No (HUD) ) Brumley, Betsy :: Unknown	HUD CoC & ESG Entry All Oth Date of Birth Date of Birth Data Quality Primary Race	er Projects (2021) - CoC Entry Date: 1	08/10/2023 10:45:25 AM 🔒
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	(23) Age Vete (25) Age Vete (24) Age Vete	hold Members ) Albertson, Alfred :: Unknown eran: Yes (HUD) ) Albertson, Alaina :: Unknown eran: No (HUD) ) Brumley, Betsy :: Unknown eran: No (HUD)	HUD CoC & ESG Entry All Other         Date of Birth         Date of Birth Data Quality         Primary Race         Secondary Race         Ethnicity         Gender	er Projects (2021) - CoC Entry Date: 1	08/10/2023 10:45:25 AM
	(23) Age Vete (24) Age Vete (24) Age Vete	hold Members ) Albertson, Alfred :: Unknown eran: Yes (HUD) ) Albertson, Alaina :: Unknown eran: No (HUD) ) Brumley, Betsy :: Unknown eran: No (HUD)	HUD CoC & ESG Entry All Other         Date of Birth         Date of Birth Data Quality         Primary Race         Secondary Race         Ethnicity         Gender         Relationship to Head of Household	er Projects (2021) - CoC Entry Date: 1	08/10/2023 10:45:25 AM
	(23) Age Vete (25) Age Vete Vete	hold Members ) Albertson, Alfred :: Unknown eran: Yes (HUD) ) Albertson, Alaina :: Unknown eran: No (HUD) ) Brumley, Betsy :: Unknown eran: No (HUD)	HUD CoC & ESG Entry All Other         Date of Birth         Date of Birth Data Quality         Primary Race         Secondary Race         Ethnicity         Gender         Relationship to Head of Household         Client Location *	er Projects (2021) - CoC Entry Date: 1	08/10/2023 10:45:25 AM

## 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

today

Used to calculate a client's chronic homelessness (CH) status



1	Income from Any Source	-Select-	<b>v</b> (	3		
A	Q Monthly Income				2	HUD Verification
	Monthly Amount Source o	fIncome		Start Date *	End Date	
	Add View Gross	s Income				
3	Total Monthly Income	G				
	Non-cash benefit from any source	-Select-	<b>v</b> (	3		
В	Q Non-Cash Benefits					HUD Verification
	Source of Non-Cash Benefit	Start Date *		End Date		Amount of Non- Cash Benefit
	Add					
	Covered by Health Insurance	-Select-	<b>v</b> (	3		
C	Q Health Insurance					HUD Verification
	Start Date *	Health Insurance Typ	be	Covered?	End Date	
	Add					
	Does the client have a disabling condition?	-Select-	~ (	3		
D	Q Disabilities					HUD Verification
	Disability Type					
	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 with or displayed and take precedence for reporting purposes.

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

O <u>No</u> <u>Data Not Collected</u> <u>Incomplete</u>

		Receiving In	come Source?	
Source of Income	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	0	0	0	۲
Earned Income (HUD)	0	0	0	۲
Pension or retirement income from another job (HUD)	0	0	0	۲
Private Disability Insurance (HUD)	0	0	0	۲
VA Non-Service Connected Disability Pension (HUD)	0	0	0	۲
Unemployment Insurance (HUD)	0	0	0	۲
SSDI (HUD)	0	0	0	۲
SSI (HUD)	0	0	0	۲
Worker's Compensation (HUD)	0	0	0	۲
TANF (HUD)	0	0	0	۲
VA Service Connected Disability Compensation (HUD)	0	0	0	۲
Retirement Income From Social Security (HUD)	0	0	0	۲
Other (HUD)	0	0	0	۲
Child Support (HUD)	0	0	0	۲

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.

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-ASS	FSSMFNT
OFDATING		

QN	Ionthly Income			1 HUD Verification
	Monthly Amount	Source of Income	Start Date *	End Date
/ 1	Ĭ	Child Support (HUD)	08/02/2023	
/ 1	Ĭ	Other (HUD)	08/02/2023	
	ĭ	VA Service Connected Disability Compensation (HUD)	08/02/2023	
/ 1	i	TANF (HUD)	08/02/2023	
/ 1	ĭ	Retirement Income From Social Security (HUD)	08/02/2023	
A	dd View	Gross Income	Showing 1-5 of 14	First Previous Next Last

- 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

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.

		Receiving I	ncome Source?	
Source of Income	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)				
Earned Income (HUD)				
Pension or retirement income from another job (HUD)		۲		
Private Disability Insurance (HUD)		۲		
VA Non-Service Connected Disability Pension (HUD)		۲		
<ul> <li>Unemployment Insurance (HUD)</li> </ul>		۲		
SSDI (HUD)		۲		
🖍 BI (HUD)		۲		
Worker's Compensation (HUD)		۲		
TANF (HUD)				
VA Service Connected Disability Compensation (HUD)				
Retirement Income From Social Security (HUD)				
Other (HUD)				
Child Support (HUD)		۲		
		Save	Save & Exit	Exit



the Receiving Income Source?	O No	iu take precede	ence for reportin	ng purposes.		Recordset		
lue for all incomplete Source of come records	Data Not Collected     Incomplete							
			Receiving In	ncome Source?		othly income		
iource of Income		Yes	No	Data Not Collected	Incomplete	nuny meone		
limony or Other Spousal Support (HUD)			۲					
arned income (HUD)						fonthly Amount	771 (	
ension or retirement income from anothe	r job (HUD)		۲			ource of Income	SSI (HUD)	
ivate Disability Insurance (HUD)						ource of income	001(1100)	
A Non-Service Connected Disability Pens	ion (HUD)		۲			Other, Please Specify		, G
inemployment Insurance (HUD)			۲					//
I (HUD)		0	۲	0	0 -	eceiving Income Source?	Yes	
ISI (HUD)		0	0	0	۲	dditional Comment	G	
Vorker's Compensation (HUD)		0	۲	۲	۲			_
ANF (HUD)			۲			tart Date *	08 / 02 / 2023	🗎 O 🗖 (
A Service Connected Disability Compens	ation (HUD)		۲				/ /	
letirement Income From Social Security (	HUD)		۲			nd Date	/ /	🗄 Ə 🖬 🤇
ther (HUD)			۲					
child Support (HUD)								Save

- 4. A line item should now be Incomplete after closing out a previous entry record.
  - Now, select the applicable answer
- 5. If Yes is selected, add the **new Monthly Amount** and **new Start Date** 
  - Click Save, and Exit the HUD Verification window
- 6. A new entry will be reflected on the table
  - If the income amount has changed, remember to update the Total Monthly Income field



Q Monthly Income			HUD Verification 🥏
Monthly Amount	Source of Income	Start Date *	End Date
🖍 📋 US\$771.00	SSI (HUD)	08/02/2023	
/ 1	Child Support (HUD)	07/01/2023	
/ 1	Other (HUD)	07/01/2023	
/ 1	VA Service Connected Disability Compensation (HUD)	07/01/2023	
/ 1	TANF (HUD)	07/01/2023	
Add View Gr	ross Income	Showing 1-5 of 15	First Previous Next Last
Total Monthly Income	771 G		
Non-cash benefit from any source	-Select- V G		
Q Non-Cash Benefits			HUD Verification
Source of Non-Cash Benefi	it Start Date *	End Date	Amount of Non- Cash Benefit
Add		No matches.	

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.



# 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				Type here for Glo	bal Search		• 丸 🖈 😮		
Client - (13) Stark, T	ony								ð
(13) Stark, Tony Release of Information:	None					-Switc	h to Another Househ	old Member- 🗸	Submit
Client Information					Service T	ransactions			
Summary	Client Profile	Households		ROI		Entry / Exit	Case Manag	gers Cas	e Plans
	i Reminder: Ho	ousehold membe	ers mus	t be establi	shed on Ho	useholds tab bef	ore creating Entry / E	Exits	
Entry / Exit									
Program			Тур	ре	Pro	oject Start Date	Exit Date	Interims Foll	low Client os Count
TOUR AGENCY	HERE - YOUR PROJECT I	HERE (23)	HU	ID	<b>0</b> 8	/02/2023			
Add Entry / Ex	tit				Sho	owing 1-1 of 1			

# HOW TO ADD CASE MANAGERS

 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.

Clients > Client Pro	Clients > Client Profile Type				Type here for Global Search 📰 💂				
lient - (13) Stark, <sup>-</sup>	Tony								
(13) Stark, Tony Release of Information:	None				-Switch to A	Another Household Meml	per- 🗸 Submit		
lient Information				Service Tr	ansactions				
Summary	Client Profile	Households	ROI	Ĭ	Entry / Exit	Case Managers	Case Plans		
Case Managers									
Name	Provider	Phone Nu	mber		Start Date	End D	ate		
Add Case Ma	nager				No matches.				
							Exit		

#### ADDING A CASE MANAGER

- 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

-	Ca	se Manager	ark Tony	×
		Llouesheld Members		
	•	Household Members		
		To include Househol	d 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		
		□ <u>(14) Stark, Morgan</u>	1	
2		Туре *	● <u>Community Services User</u> ○ <u>Me</u> ○ <u>Other</u> B	
-		Select User *	YOUR AGENCY HERE (4)	
		Α	-Select-	
		Name *		
		Title		
		Phone Number		
		Email Address		
		Provider *	YOUR AGENCY HERE (4)	
		Start Date *	08 / 17 / 2023 🛗 🖸 🖬	
		End Date	/_/ i 🖯 🛗	



# **HOW TO ADD SERVICE TRANSACTIONS**

- 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

Clients > Client Profile		Ту	pe here for Global Search	🖶 🏚 ★ 😮
Client - (13) Stark, Tony				ð
(13) Stark, Tony				
Release of Information: None			-Switch to Another Househo	old Member- 🗸 Submit
Client Information		1 Service Tr	ansactions	
Service Transaction Dashboar	d			
• •	<b>1</b>			
Add Need	Add Service	Add Multiple Services	Add Referrals	View Previous Service Transactions
Ma				
View Shelter Stays	View Entire Service History			

#### ADDING A SERVICE TRANSACTION

- 1. Select the household member(s) working with the Case Manager\_\_\_\_\_
- 2. Select specific Service Provider
- 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.

		Type here for Global Search 🚽 📲 🐙
Client - (13) Stark, Ton	у	
(13) Stark, Tony		
Release of Information: Non	e	-Switch to Another Household Member- 🗸 Subm
Client Information		Service Transactions
Add Service		
<ul> <li>Household Members</li> </ul>	3	
i To include H	ousehold members for this Service, click the box besi	ide each name. Only members from the SAME Household may be selected.
(4) Two Parent Fam	ily	
(10) Ohoda Tara		
(13) Stark, Tony	(Primary Client)	
(13) Stark, Tony (15) Potts, Pepp	(Primary Client) ber	
( <u>13) Stark, Iony</u> ( <u>15) Potts, Pepp</u> ( <u>14) Stark, Morg</u>	(Primary Client) ber yan	
<ul> <li>(13) Stark, Iony</li> <li>(15) Potts, Pepp</li> <li>(14) Stark, Morg</li> <li>Service Provider *</li> </ul>	(Primary Client) per jan YOUR AGENCY HERE (4)	~
<ul> <li>(13) Stark, Iony</li> <li>(15) Potts, Pepp</li> <li>(14) Stark, Morg</li> <li>Service Provider *</li> <li>Creating User</li> </ul>	(Primary Client) per jan YOUR AGENCY HERE (4) TRAINING LOGIN	~
<ul> <li>(13) Stark, Iony</li> <li>(15) Potts, Pepp</li> <li>(14) Stark, Morg</li> <li>Service Provider *</li> <li>Creating User</li> <li>Start Date *</li> </ul>	(Primary Client) er jan YOUR AGENCY HERE (4) TRAINING LOGIN 08 / 03 / 2023  ☐ 12  ✓ : 26  ✓	✓ : 45 ▼ PM ▼
<ul> <li>(13) Stark, Iony</li> <li>(15) Potts, Pepp</li> <li>(14) Stark, Morg</li> <li>Service Provider *</li> <li>Creating User</li> <li>Start Date *</li> <li>End Date</li> </ul>	(Primary Client) per jan YOUR AGENCY HERE (4) TRAINING LOGIN 08 / 03 / 2023  ☐ ①  ☐ 12	<ul> <li>✓</li> <li>2 45 ▼ PM ▼</li> <li>2 45 ▼ PM ▼</li> </ul>
<ul> <li>(13) Stark, Iony</li> <li>(15) Potts, Pepp</li> <li>(14) Stark, Morg</li> <li>Service Provider *</li> <li>Creating User</li> <li>Start Date *</li> <li>End Date</li> <li>Service Type *</li> </ul>	(Primary Client) er jan YOUR AGENCY HERE (4) TRAINING LOGIN 08 / 03 / 2023  ☐ 12 ∨ : 26 ∨ 08 / 03 / 2023  ☐ 12 ∨ : 26 ∨ -Select-	<ul> <li>✓</li> <li>2 45 ▼ PM ▼</li> <li>2 45 ▼ PM ▼</li> <li>✓ Look Up</li> </ul>
<ul> <li>(13) Stark, Iony</li> <li>(15) Potts, Pepp</li> <li>(14) Stark, More</li> <li>Service Provider *</li> <li>Creating User</li> <li>Start Date *</li> <li>End Date</li> <li>Service Type *</li> <li>Provider Specific Service</li> </ul>	(Primary Client) eer jan YOUR AGENCY HERE (4) TRAINING LOGIN 08 / 03 / 2023  ☐ 12  : 26 08 / 03 / 2023  ☐ 12  : 26 -Select- -Select- ▼	<ul> <li>✓</li> <li>45 ✓ PM ✓</li> <li>45 ✓ PM ✓</li> <li>Look Up</li> </ul>

		Type here for	Global Search	
ent - <mark>(</mark> 13) Stark, Ton <u>y</u>	у			
(13) Stark, Tony				
Release of Information: None	8	-Sw	itch to Another Household Member- 🗙	Subr
ent Information		Service Transactions		
ld Service				
Household Members	3			
<ul> <li>To include H</li> <li>(4) Two Parent Fam</li> <li>(13) Stark, Tony</li> <li>(15) Potts, Penn</li> </ul>	ousehold members for this Service, click the box besid ily (Primary Client) per	e each name. Only memb	ers from the SAME Household may be s	elected.
i To include H	ousehold members for this Service, click the box besid ily (Primary Client) per an YOUR AGENCY HERE (4)	e each name. Only memb	ers from the SAME Household may be s	elected.
i To include He (4) Two Parent Fam (13) Stark, Tony (15) Potts, Pepp (14) Stark, Morg Service Provider * Creating User	ousehold members for this Service, click the box besid ily (Primary Client) per an YOUR AGENCY HERE (4) TRAINING LOGIN	e each name. Only memb	ers from the SAME Household may be s	elected.
i To include He (4) Two Parent Fam (13) Stark, Tony (15) Potts, Pepp (14) Stark, Morg Service Provider * Creating User Start Date *	ousehold members for this Service, click the box besid         ily         (Primary Client)         ver         ian         YOUR AGENCY HERE (4)         TRAINING LOGIN         08 / 03 / 2023         12 * : 26 * :	e each name. Only memb	ers from the SAME Household may be s	elected.
i To include He (4) Two Parent Fam (13) Stark, Tony (15) Potts, Pepp (14) Stark, Morg Service Provider * Creating User Start Date * End Date	ousehold members for this Service, click the box beside         ily       (Primary Client)         ver       Image: Client)         Image: Client)         VOUR AGENCY HERE (4)         TRAINING LOGIN         08       03       2023       Image: Colspan="2">Image: Colspan="2" Image: Colspa="2" Image: Colspan="2" Image: Colspan="2" Image: Cols	• each name. Only memb 45 ♥ PM ♥ 45 ♥ PM ♥	ers from the SAME Household may be s	elected.
i To include He (4) Two Parent Fam (13) Stark, Tony (15) Potts, Pepp (14) Stark, Morg Service Provider * Creating User Start Date * End Date Service Type *	ousehold members for this Service, click the box beside         ily       (Primary Client)         ver       Image: Client)         Image: Client)         VOUR AGENCY HERE (4)         TRAINING LOGIN         08       03       2023       Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2">Image: Colspan="2"         08       03       2023       Image: Colspan="2"       Image: Colspan="2"         -Select-       -Select       -Select       -Select       -Select	e each name. Only memb 45 V PM V 45 V PM V	ers from the SAME Household may be s	elected.

### 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
End Date	08 / 03 / 2023
Service Type *	At Risk/Homeless Housing Related Assistance Programs (BH-0500)
Provider Specific Service	-Select- V
Service Notes	i



# **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

t Profile			Тур	e here for Glob	al Search		•	<b>\$</b>	7 (
k, Tony									
ion: None				-Switch	to Another Hous	ehold Meml	ber- 🗸	Subr	nit
			Service Tra	nsactions					
Client Profile	Households	ROI		Entry / Exit	Case Ma	inagers	Case	Plans	
i Reminder: Ho	ousehold members mus	st be establ	ished on Hous	eholds tab be	fore creating Entr	y / Exits			
	Ту	ре	Proje Date	ct Start	Exit Date	Interim	Follov Ups	v Client Count	
CY HERE - YOUR PROJEC	T HERE (23) HU	ID	08/02	2/2023		1		Q	0
	k, Tony ion: None Client Profile  Reminder: Ho CY HERE - YOUR PROJEC	k, Tony ion: None Client Profile Households  Reminder: Household members mus Typ CY HERE - YOUR PROJECT HERE (23) HU	k, Tony ion: None Client Profile Households ROI ROI Reminder: Household members must be establ Type CY HERE - YOUR PROJECT HERE (23) HUD	Profile       Typ         k, Tony       ion: None         Ion: None       Service Tra         Client Profile       Households       ROI         Image: Reminder: Household members must be established on Household       Roi         Type       Proje Date         CY HERE - YOUR PROJECT HERE (23)       HUD       08/02	Promie       Type here for Glot         k, Tony       .switch         ion: None       .switch         Client Profile       Households       ROI       Entry / Exit         Image: Reminder: Household members must be established on Households tab ber       Type       Project Start Date         Type       Project Start Date       O8/02/2023       O8/02/2023	Profile       Type here for Global Search         k, Tony       -Switch to Another Hous         ion: None       -Switch to Another Hous         Service Transactions       Service Transactions         Client Profile       Households       ROI       Entry / Exit       Case Ma         Image: Reminder: Household members must be established on Households tab before creating Entry       Type       Project Start Date         Type       Project Start Date       Exit Date         CY HERE - YOUR PROJECT HERE (23)       HUD       08/02/2023	Profile       Type here for Global Search         k, Tony       -Switch to Another Household Memile         ion: None       -Switch to Another Household Memile         Client Profile       Households       ROI       Entry / Exit       Case Managers         Image: Client Profile       Households       ROI       Entry / Exit       Case Managers         Image: Reminder: Household members must be established on Households tab before creating Entry / Exits       Type       Project Start Date       Exit Date       Interime         CY HERE - YOUR PROJECT HERE (23)       HUD       08/02/2023       Image: Comparison of the start Date       Image: Comparison of the star	Profile       Type here for Global Search         k, Tony         ion: None         Service Transactions         Client Profile       Households         ROI       Entry / Exit       Case Managers         Client Profile       Households       ROI         Entry / Exit       Case Managers       Case         Type       Project Start       Exit Date       Interims Follow         CY HERE - YOUR PROJECT HERE (23)       HUD       08/02/2023       1       E	Profile       Type here for Global Search         k, Tony         ion: None       -Switch to Another Household Member-          Service Transactions         Client Profile       Households         ROI       Entry / Exit       Case Managers         Case Plans         Reminder: Household members must be established on Households tab before creating Entry / Exits         Type       Project Start Date       Exit Date         Interims Follow Client Ups Count         CY HERE - YOUR PROJECT HERE (23)       HUD       08/02/2023

		Add In	terim Review - (13)	Stark, Tony		×
Interim Reviews	×	House	hold Members			
Interim Reviews Associated with this Entry / Exit		. (4	To include Household ) Two Parent Family	members associated with the Entry / Exit for	r this Interim Review, click the box beside ear	ch name.
Review Date Review Type	Client Count		( <u>13) Stark, Tony (Entry D</u> ( <u>14) Stark, Morgan (En</u>	<u>bate: 08/02/2023 3:41 PM)</u> try Date: 08/02/2023 3:41 PM <u>)</u>		
Add Interim Review No matches.		Interin	n Review Data			
		Ent	try / Exit Provider	YOUR AGENCY HERE - YOUR PROJECT	T HERE (23)	
		Ent	try / Exit Type	HUD		
		Inte	erim Review Type *	-Select- 🗸		
	Exit	Rev	view Date *	08 / 03 / 2023 🛗 ᢒ 🖬 12	Y : 41 Y : 56 Y PM Y	
2		3			Save & Continue	Cancel
2. Click on Add Interim Review			Entry / Exit Interim Review		ē ×	
			Entry ( E 1) Describer			

#### **Confirm details** 3.

- Select Interim Review Type Update
- Reflect when change occurred on Review Date
  - Back Date Mode can be used for this step
- Save & Continue
- Make any necessary changes
  - Housing Move-in Date
  - PATH Status updates
  - Income/ Non-cash benefits/ Insurance/ Disabling Condition

4

				~
terim 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	5 PM		
terim Review Assessment				
Household Members	HUD CoC & ESG Updat	le (2021)	Interim	Review Date: 08/03/2023 12:41:56 PM
(13) Stark, Tony Age: Unknown	Client Location *	DE-500 🗸 G		
Veteran: No (HUD) (14) Stark, Morgan	Housing Moverin Da	te / /	a B B B B B B	
Age: Unknown Veteran: No (HUD)	Trodaing Wove-In Da	/		
,	Income from Any Sc	-Select-	✓ G	
	Q. Monthly Income			HUD Verification
	Monthly Amount	Source of Income	Start Date *	End Date
	🖍 📋 US\$771.00	SSI (HUD)	08/02/2023	
	Z 11	Child Support (HUD)	07/01/2023	
	2 B	Other (HUD)	07/01/2023	
	18	VA Service Connected Disability Compensation (HUD)	07/01/2023	
	2 B	TANF (HUD)	07/01/2023	
	Add V	fiew Gross Income	Showing 1-5 of 1	5 First Previous Next Last
	Total Monthly Inc.	ome 771 G		
	Non-cash benefit fro	om any onlant		

# **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	HUD CoC & ESG Update (2021)	Interim Review Date: 08/03/2023 12:41:56 PM 🔒
(13) Stark, Tony Age: Unknown Veteran: No (HUD)	Client Location * DE-500 V G	
(14) Stark, Morgan Age: Unknown	Housing Move-in Date / / / İİ G	
Veteran: No (HUD)	Income from Any Source -Select- 🗸 G	

# ADDING AN ANNUAL ASSESSMENT

Add Interim Review - (13) Stark, Tony

#### 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** •

Household Members	
i To include Household men	bers associated with the Entry / Exit for this Interim Review, click the box beside each name.
(4) Two Parent Family	
(13) Stark, Tony (Entry Date:	<u>08/02/2023 3:41 PM)</u>
(14) Stark, Morgan (Entry D)	ate: 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- V
Review Date *	-Select- 30-Day Review 3 ℃   12   : 51   : 01   PM
	90-Day Review
	120-Day Review
	Update 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	Olient Information	0			Convice T				
Add Interim Review Showing 1	Client Information				Service II	ransactions	Υ	Ϋ́ι	
	Summary	Client Profile	Households	ROI	Entry / Exit		Case Managers	Case Plans	
		i Reminder: Ho	usehold members mus	t be establi	shed on Hou	useholds tab before c	reating Entry / Exits		
	Entry / Exit								
	Program		Тур	e	Proj Date	ject Start Ex	kit Date Interi	ms Follow C Ups C	client count
	YOUR AGENCY	HERE - YOUR PROJECT	HERE (23) HUI	)	<b>/</b> 08/	02/2023 🧪	Ę		ୢୄୄ
	Add Entry / E	kit			Sho	wing 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:

 On client's Entry/Exit tab, click on icon next to Exit Date.

Clients > Client Profile					for Global Se	earch		-	<b>1</b> 2 🖈	?
Client - (13) Stark,	Tony									ô
(13) Stark, Tony										
Release of Information:	None				-Switch to Ar	nother House	hold Mem	oer- 🗸	Subr	nit
Client Information				Service Transacti	ons					
Summary	Client Profile	Households	ROI	Entry	/ Exit	Case Mar	agers	Case	Plans	
	i Reminder: Ho	usehold members mus	t be establi	shed on Household	s tab before o	creating Entry	/ Exits			
Entry / Exit										
Program		Тур	e	Project Sta Date	rt E	xit Date	Interim	s Follow Ups	/ Client Count	
YOUR AGENCY	HERE - YOUR PROJECT	HERE (23) HU	D	/ 08/02/2023	-				Q	0
Add Entry / E	xit			Showing 1-1	l 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





### 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

intry/Exit Data	ē
Note: If you change the provid	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) ➤
Туре *	HUD V
	Update
Household Members Associated	h this Entry / Exit
Name Head	Household Project Start Date Exit Date Interims Follow Reason for Leaving Destination No
🕄 🛈 (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 N	nbers Showing 1-2 of 2
Entry Assessment	Exit Assessment
Household Members	HUD CoC & ESG Exit (2021) Exit Date: 08/03/2023 12:55:21 PM
(13) Stark, Tony Age: Unknown Veteran: No (HUD)	Income from Any Source Yes (HUD) 🗸 G
(14) Stark, Morgan Age: Unknown Veteran: No (HUD)	Q 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						r ?
Client - (13) Stark,	Tony										ð
(13) Stark, Tony Release of Information:	None				-Sw	itch to An	other Housel	nold Meml	oer- 🗸	Sub	mit
Client Information				Service T	ransactions						
Summary	Client Profile	Households	ROI		Entry / Exi	/ Exit Case Mana		agers Cas		Plans	
	i Reminder: Ho	usehold members mus	t be establi	shed on Ho	useholds tab	before cr	reating Entry	/ Exits			
Entry / Exit											
Program	Туре			Project Start Exit Date In			Interim	terims Follow Client Ups Count			
YOUR AGENCY	HERE - YOUR PROJECT	HERE (23) HUI	D	<b>0</b> 8/	/02/2023	08	/03/2023			Q	U
Add Entry / E	xit			Sho	wing 1-1 of 1	1					
										Exit	



#### THIS CONCLUDES THE CLIENT MODULE TRAINING POWERPOINT.

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