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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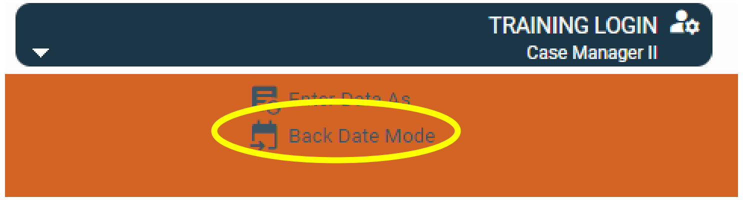
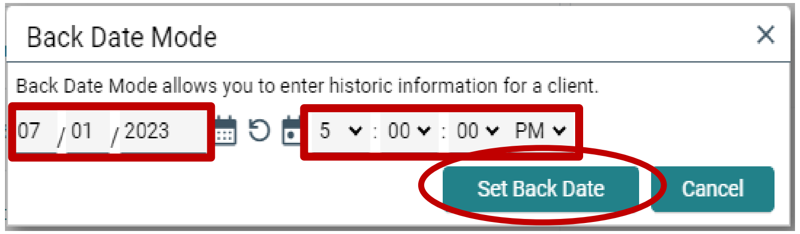
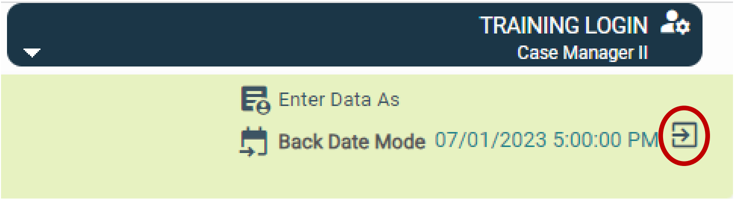
BACK DATE MODE

- 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

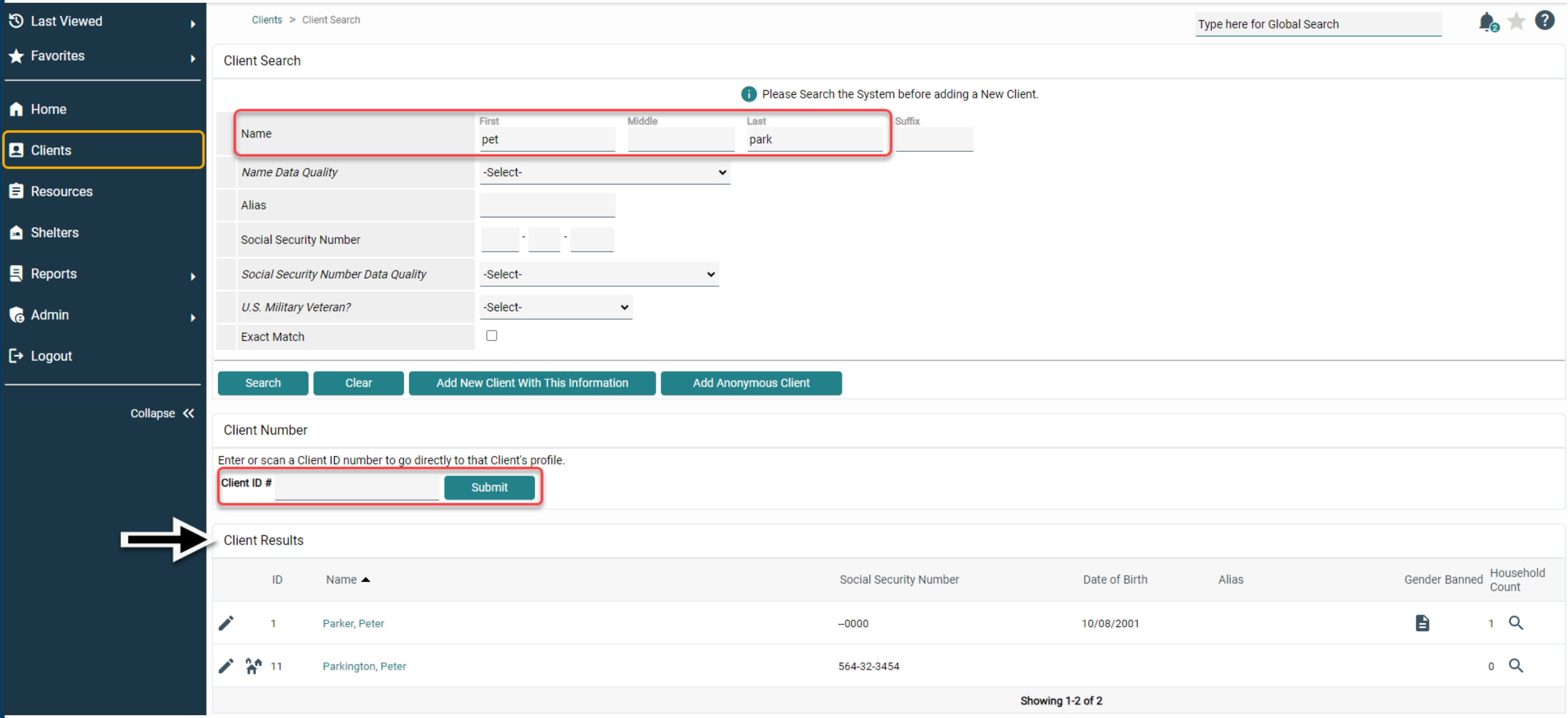






CLIENT SEARCH

- 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 #



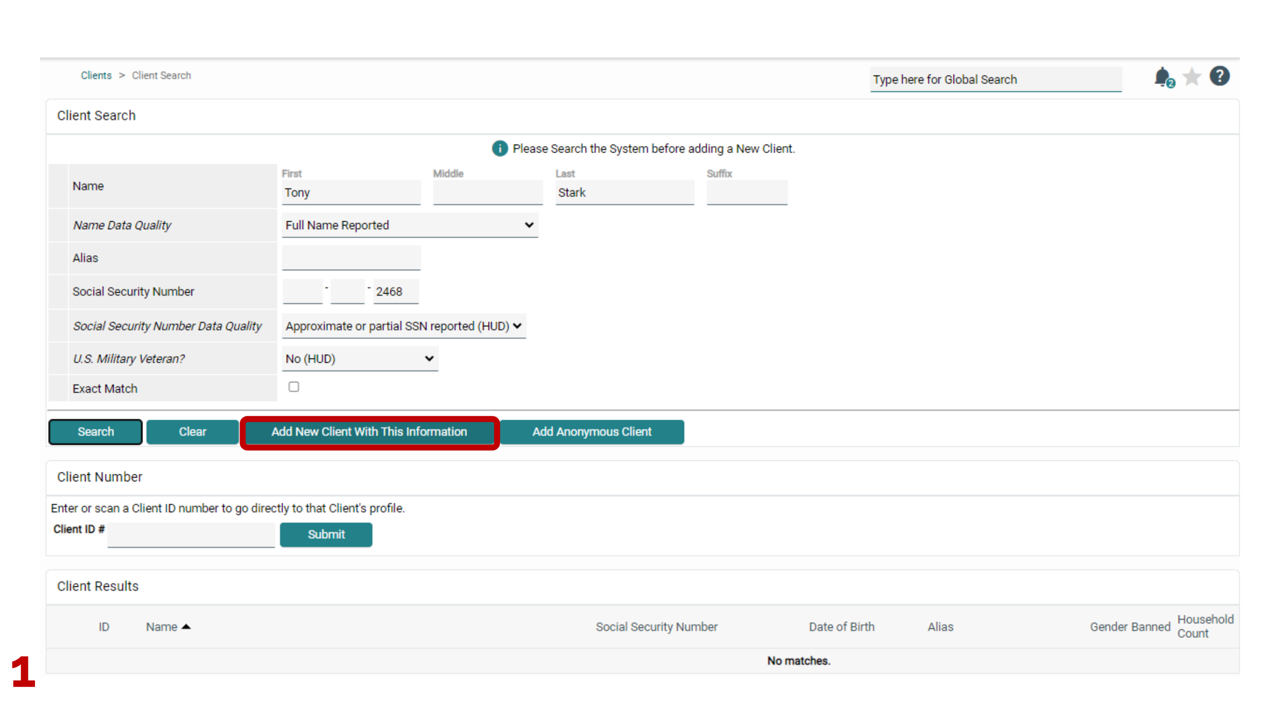
CLIENT SEARCH FAQ

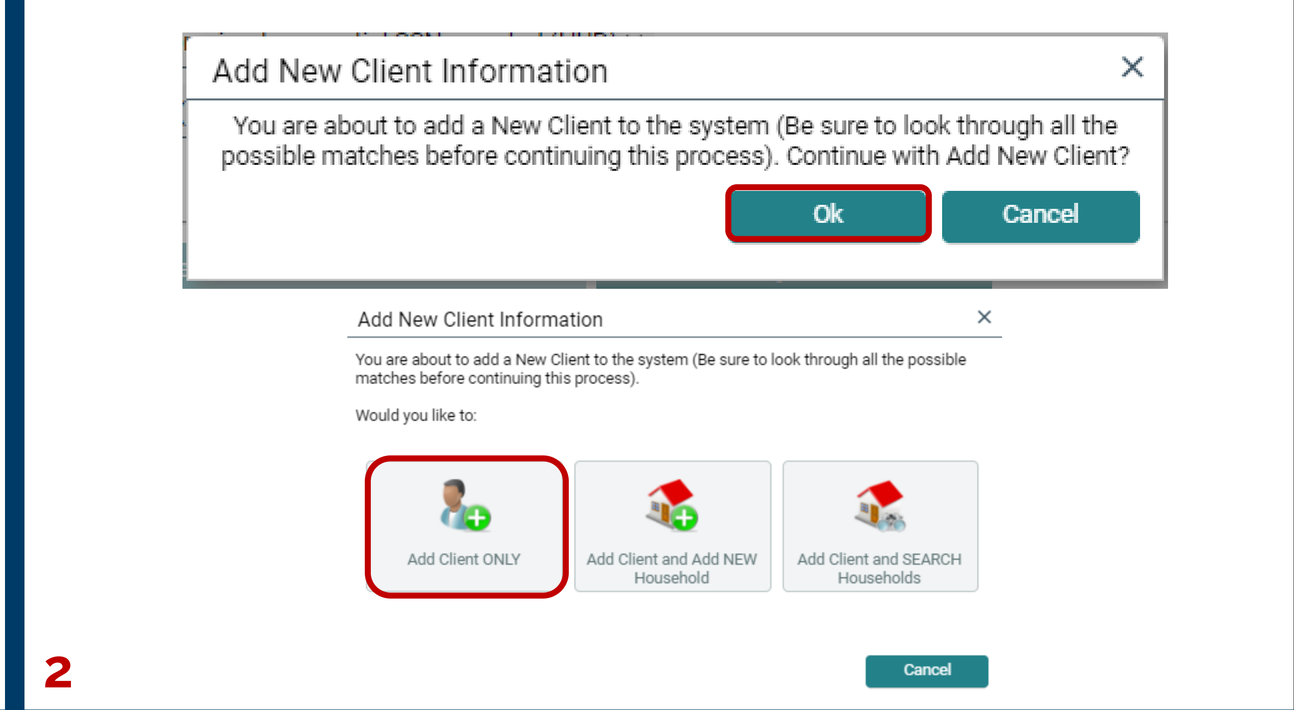
- **Q: What if I can't find the profile?**
  - Double check the spelling of your client's name.
  - All clients referred by Centralized Intake already has a profile in Clients.
  - If the client has not contacted Centralized Intake and does not appear to be in the system, **you will need to create a 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@housingalliancede.org** with the concerned Client ID numbers and they will merge the profiles.
    - After a Client Merge, the profile with the lower client ID number will be the remaining profile.

CREATING A NEW CLIENT PROFILE

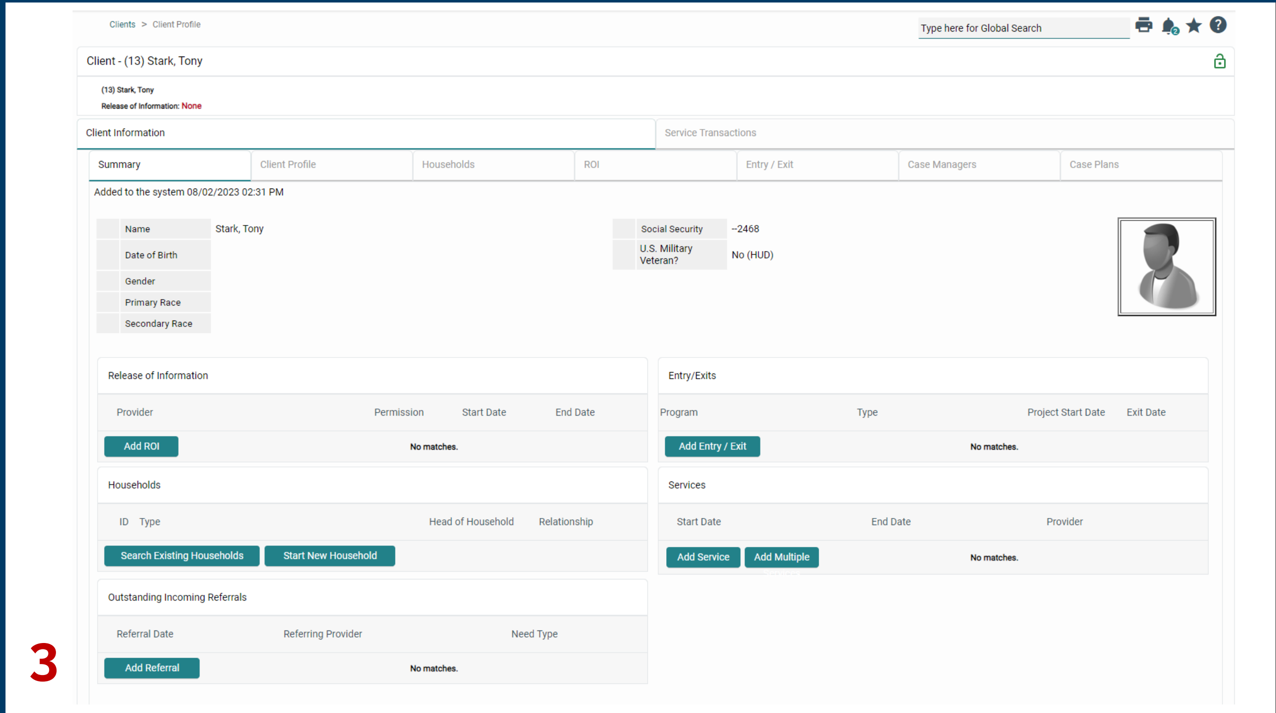
Profile already created for your client? **SKIP THIS SECTION.**





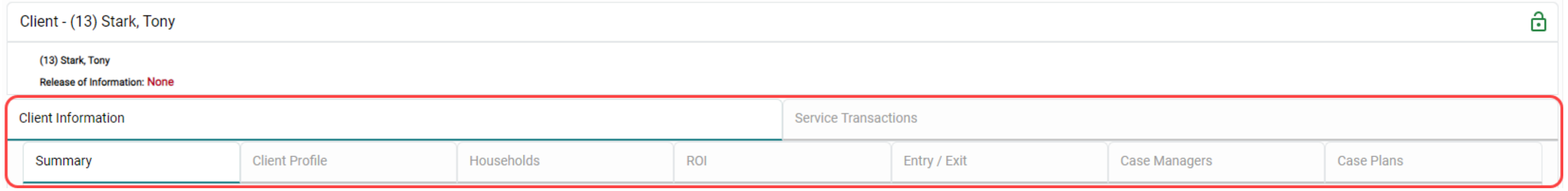
CREATING A NEW PROFILE

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



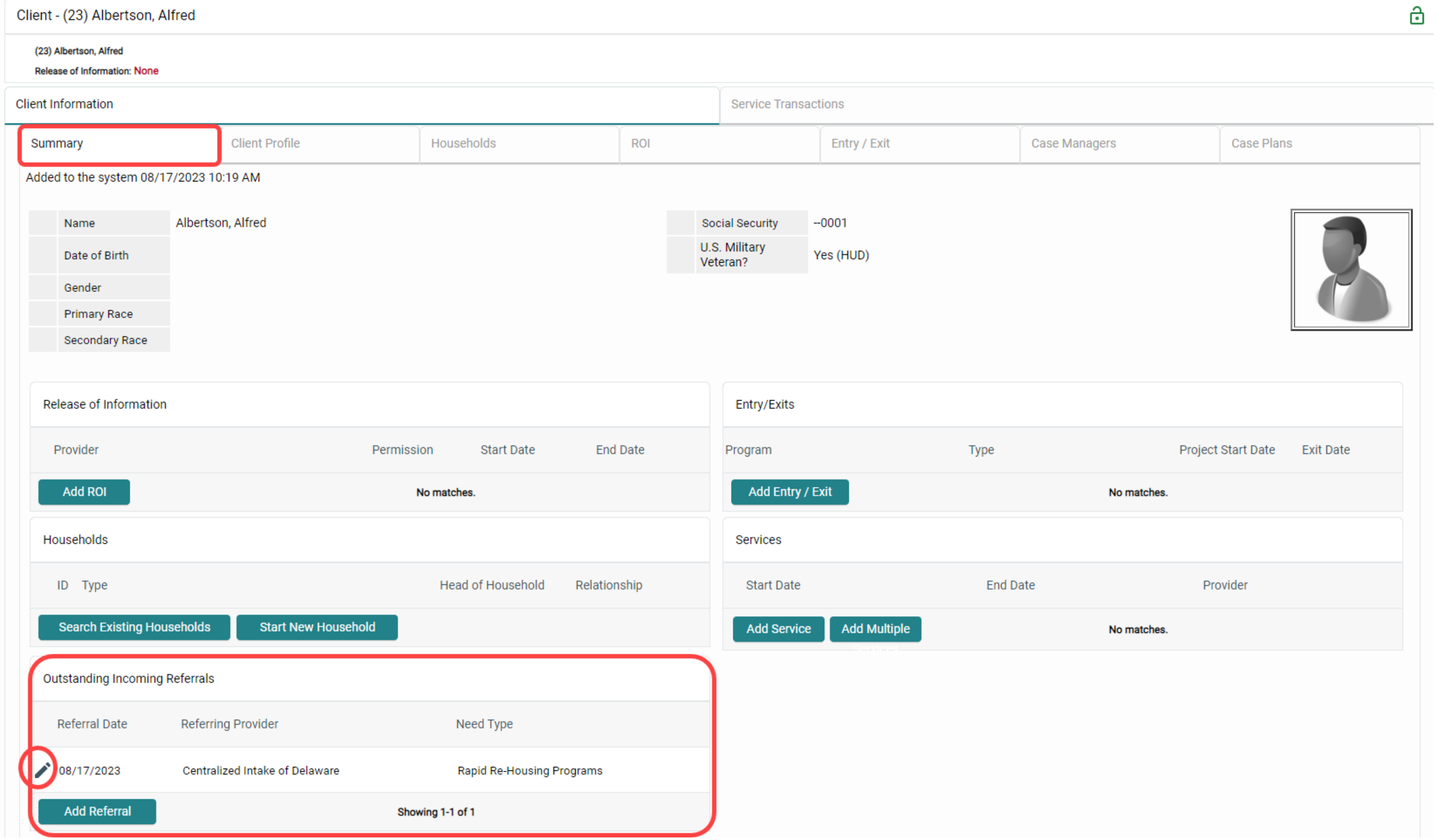
NAVIGATION TABS

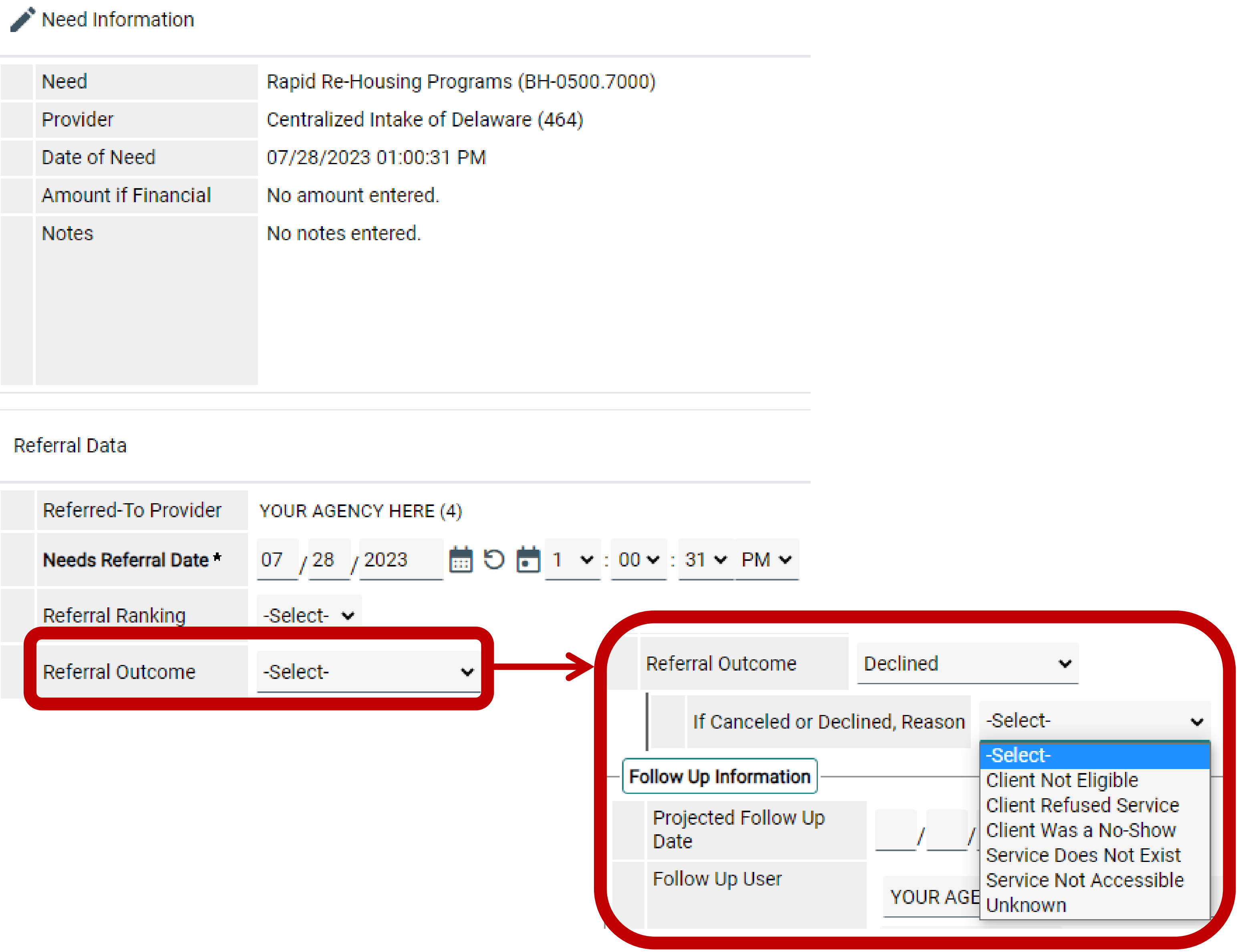
- These tabs are where information will be added
  - A. Client Information
    1. Summary
    2. Client Profile
    3. Households
    4. ROI
    5. Entry/Exit
    6. Case Managers
    7. Case Plans
  - B. Service Transactions



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**



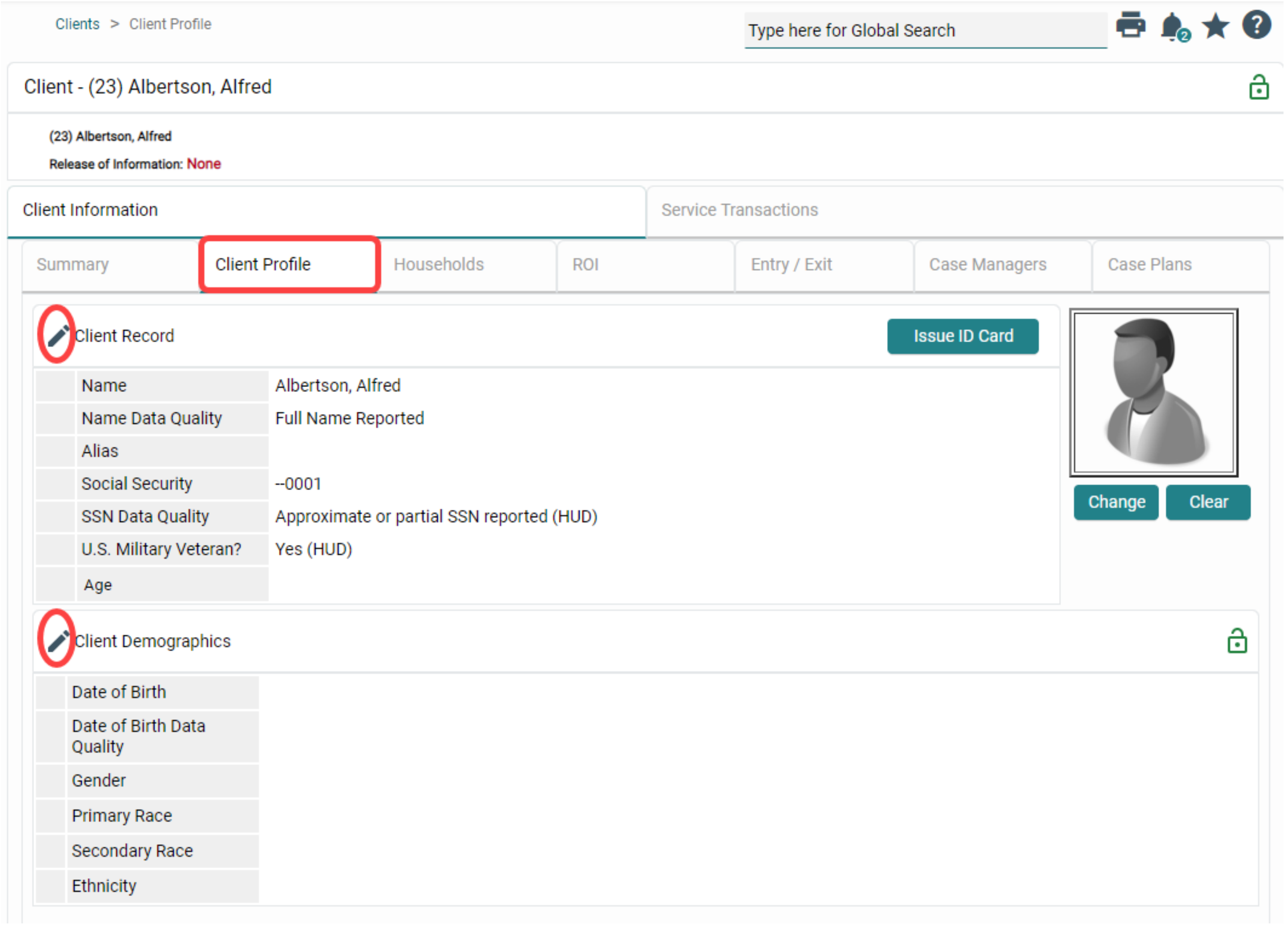


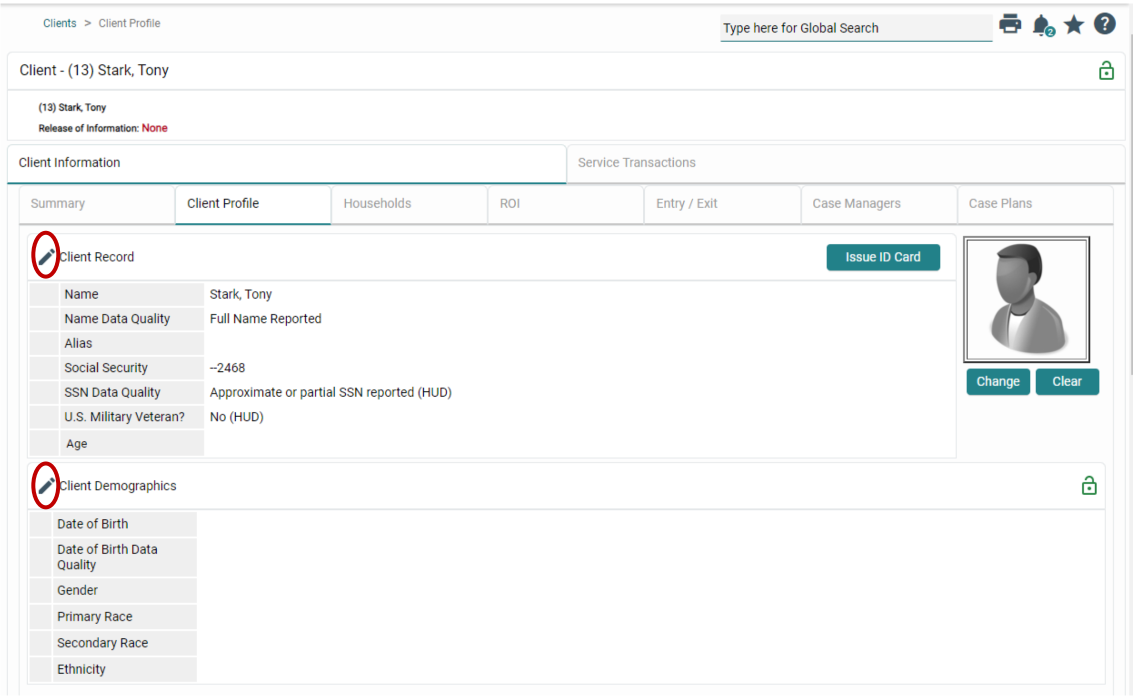
UPDATING REFERRALS

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

CLIENT PROFILE TAB

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





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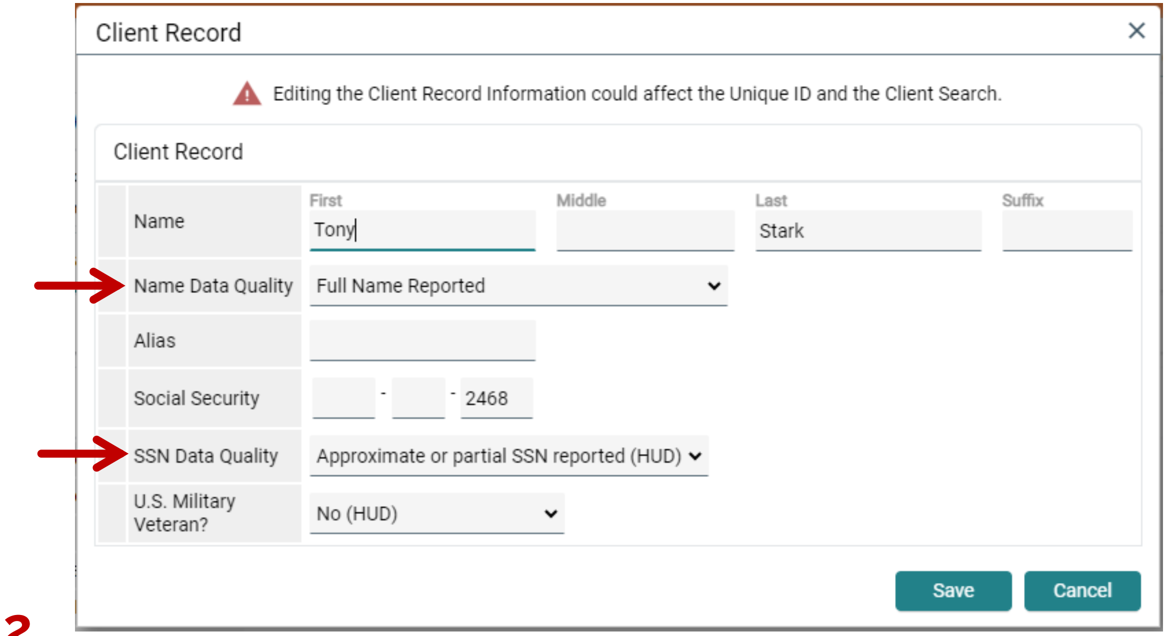

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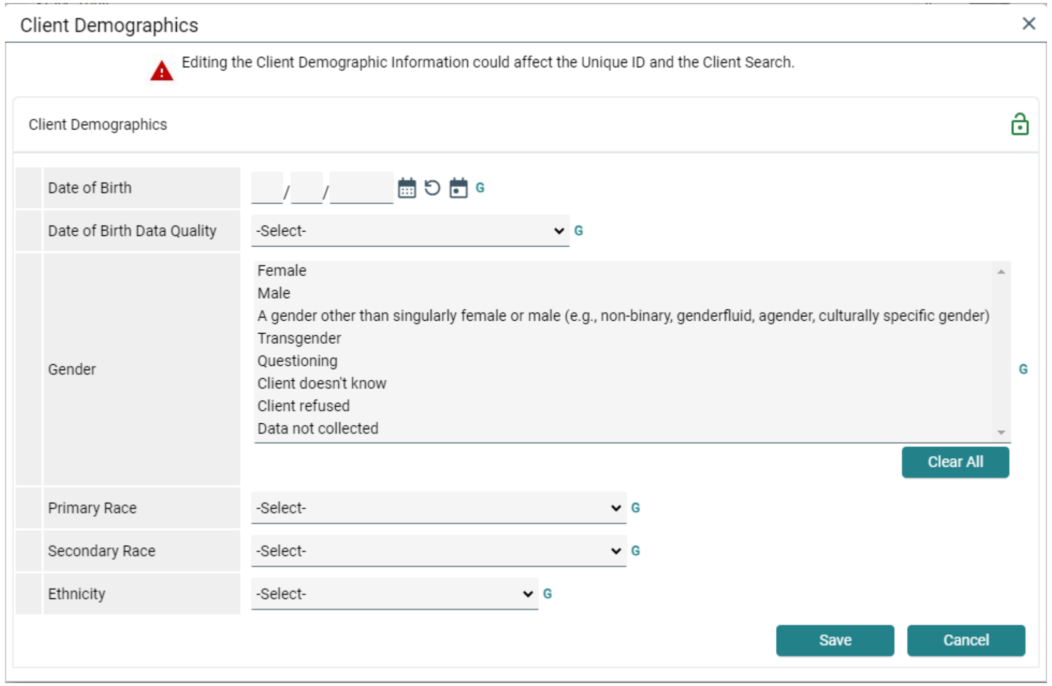
1. To edit client's information, click on the pencil icon
   - **Complete/Update as many fields as possible**
2. **CLIENT RECORD**
   - Data Quality for Name and SSN are required
3. **CLIENT DEMOGRAPHICS**
   - Data Quality for Date of Birth is required
   - Gender – multiple answers can be selected by holding down the Ctrl-button
   - Ethnicity and Race are independent questions and both need to be answered



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HOUSEHOLDS TAB

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

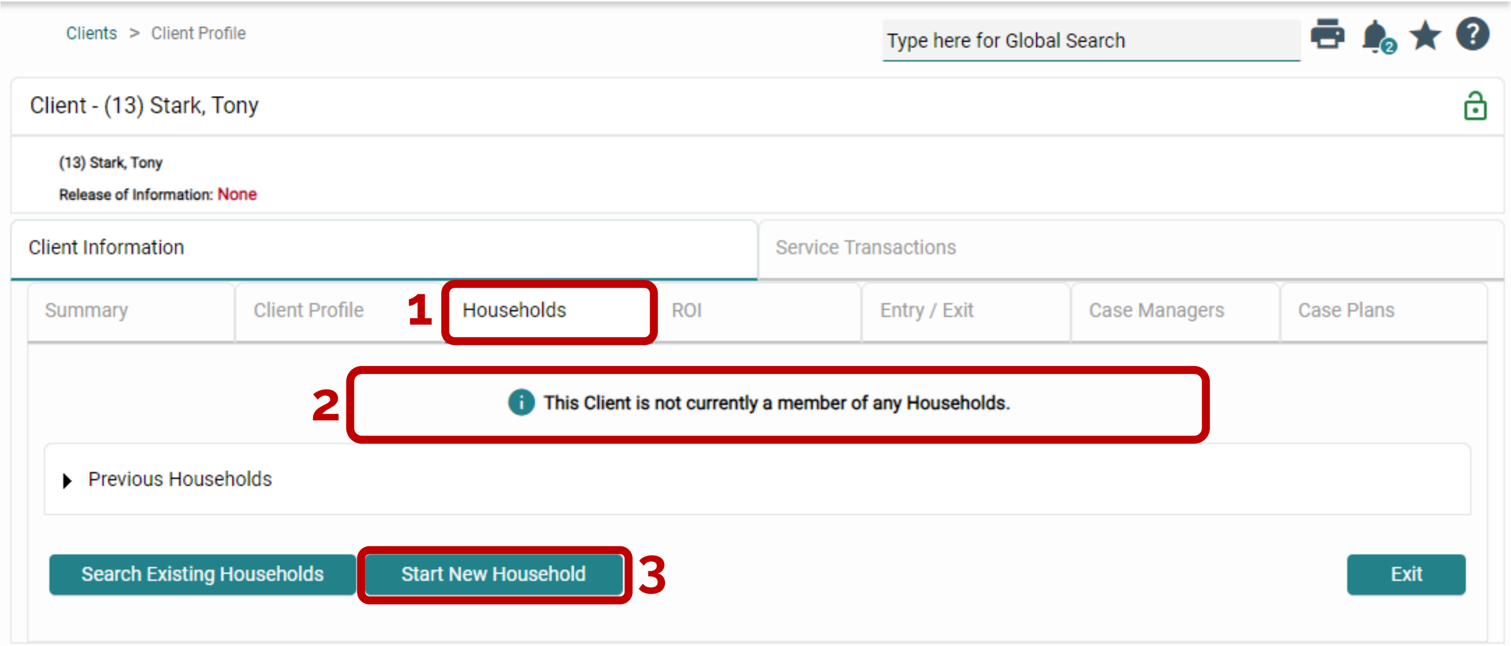
Need to **MANAGE** a Household? **CLICK HERE**.

HOW TO CREATE A NEW HOUSEHOLD

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

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

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



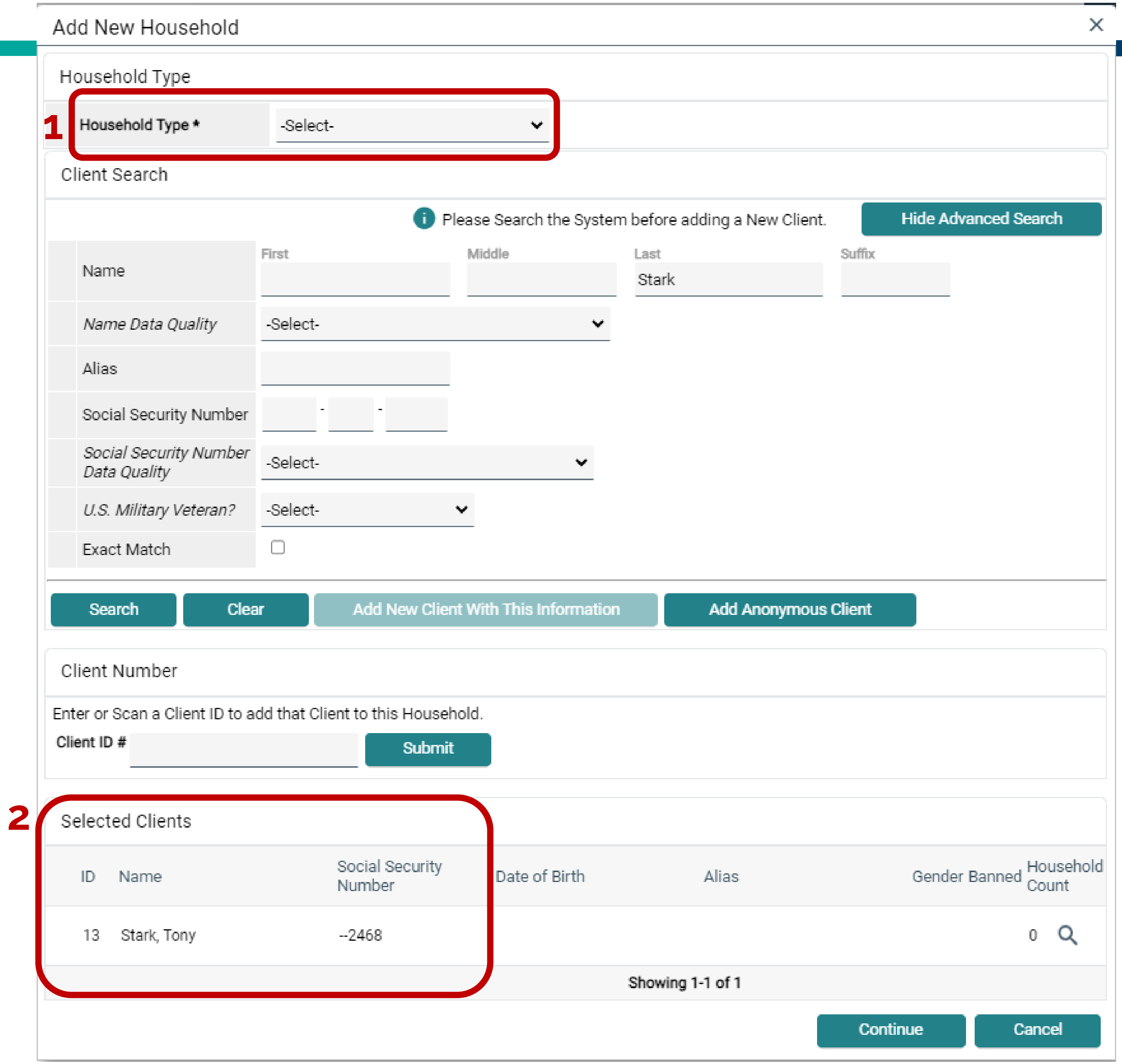
(Client already part of a household and needs to be edited? **CLICK HERE**)

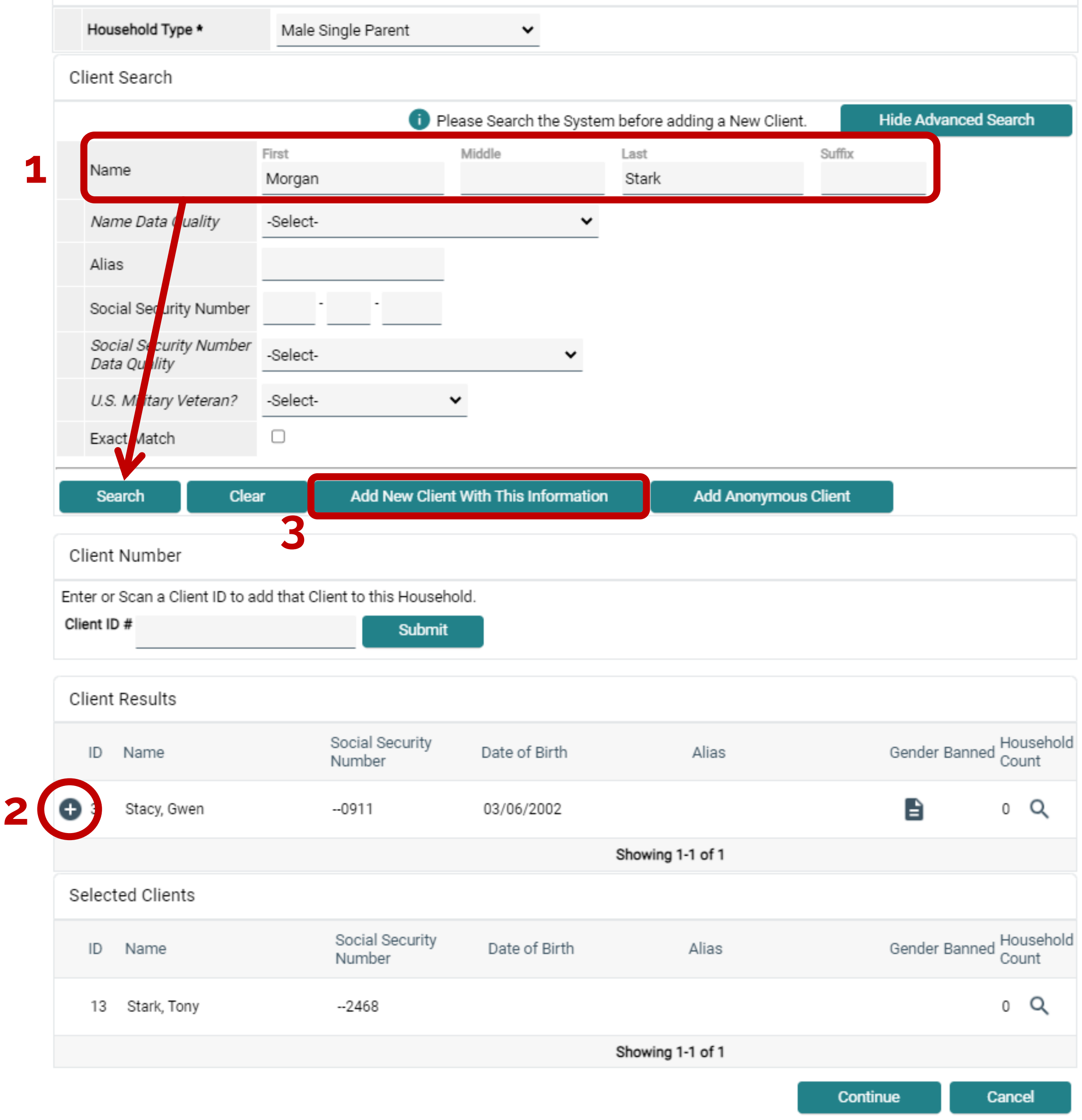
CREATING A NEW HOUSEHOLD

1. Select appropriate **Household Type**

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

To add other household members, see next slide →





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

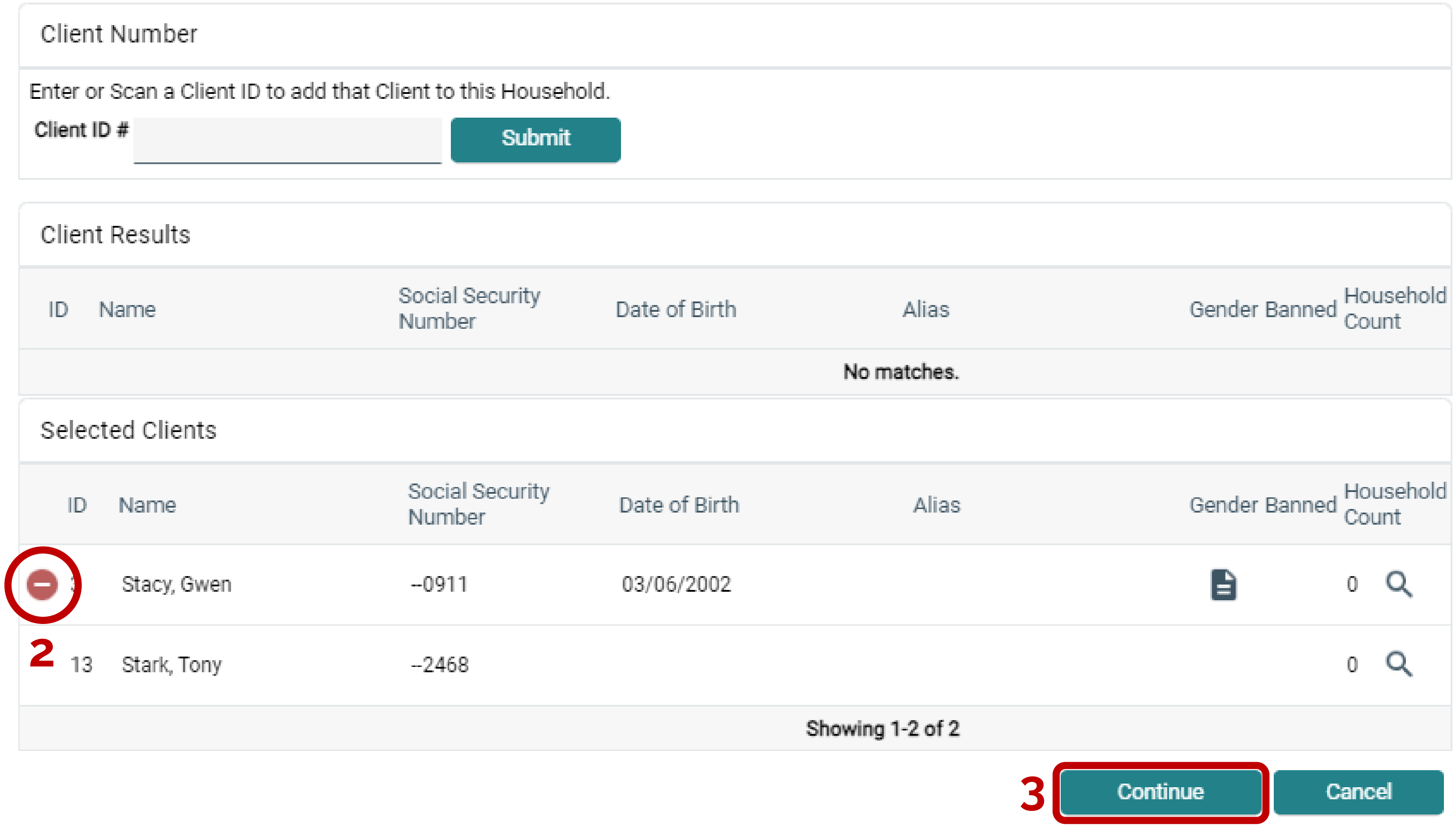
Q: HOW TO KNOW IF CORRECT CLIENT(S) WERE SELECTED?

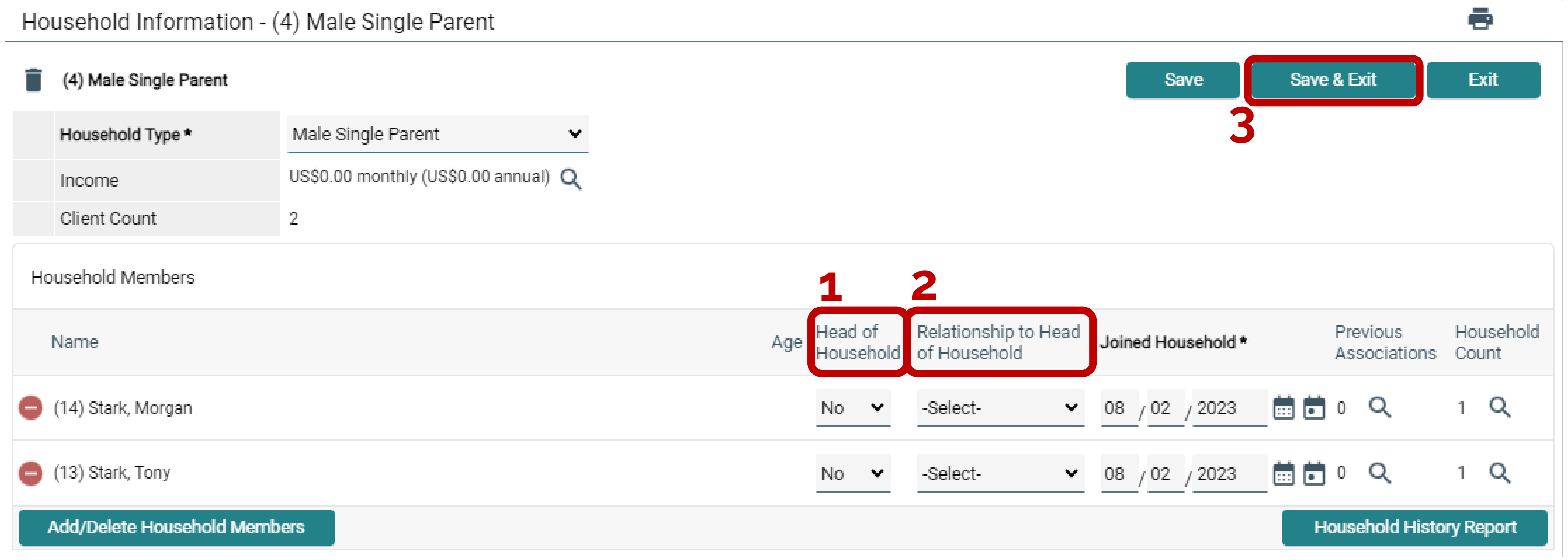
A: Check the names under Selected Clients

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





HEAD OF HOUSEHOLD

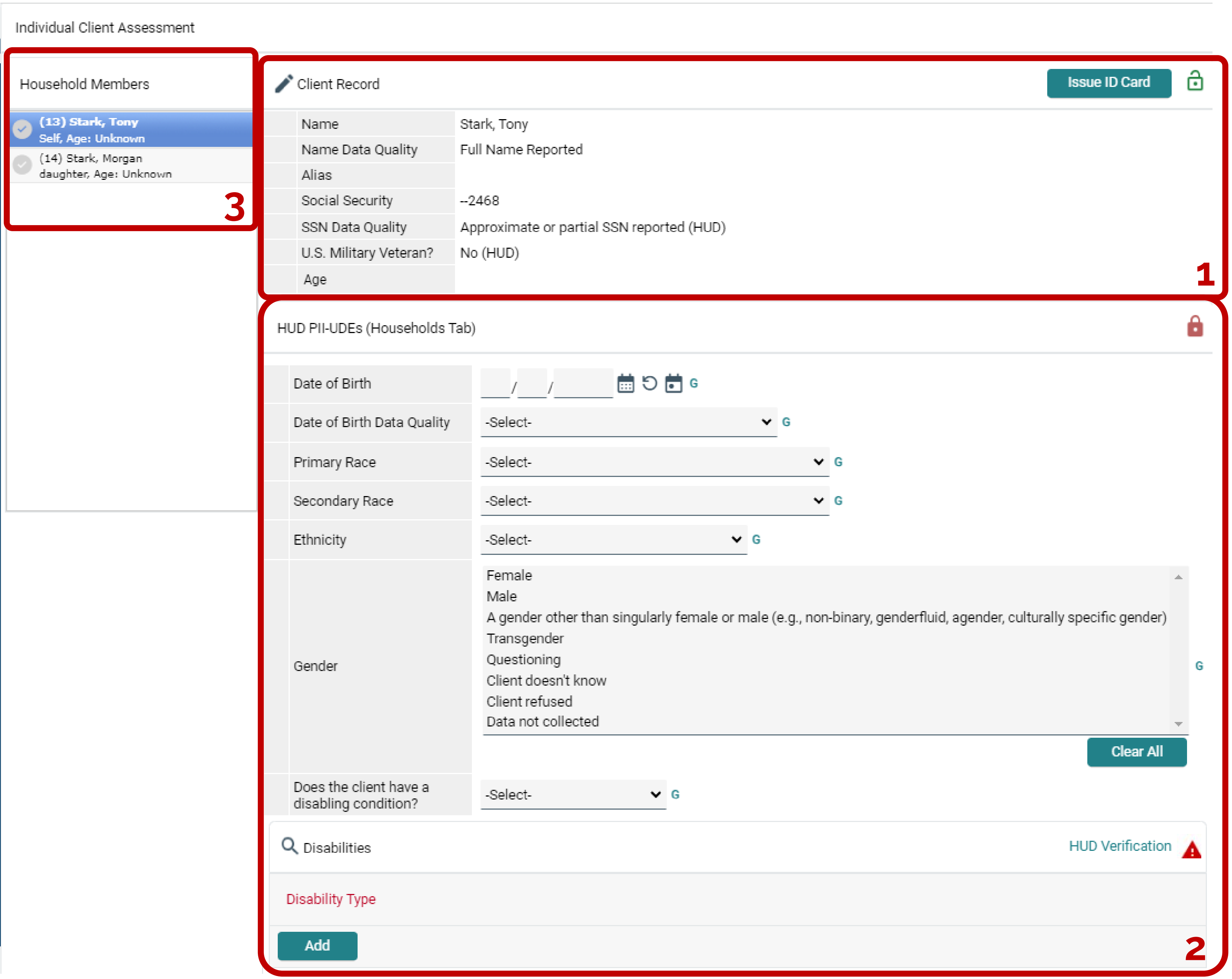
1. Select the **Head of Household**
   - ***There can only be one per household***, even in a two parent/adult household

2. For the rest of the household members, select their Relationship to the Head of Household

3. Save and Exit

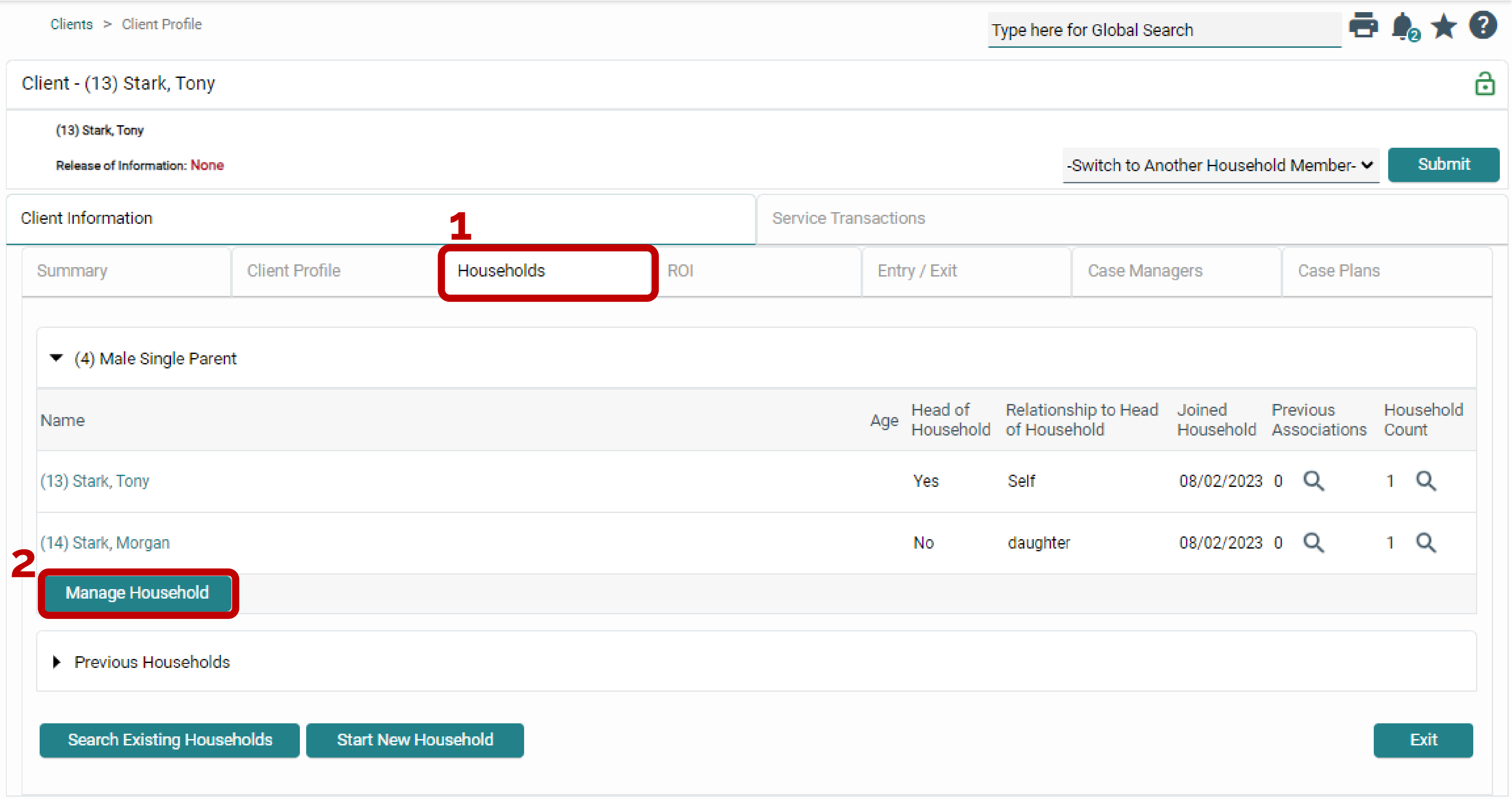
REMINDER: ASSESSMENTS FOR NEWLY CREATED CLIENTS

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



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.

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

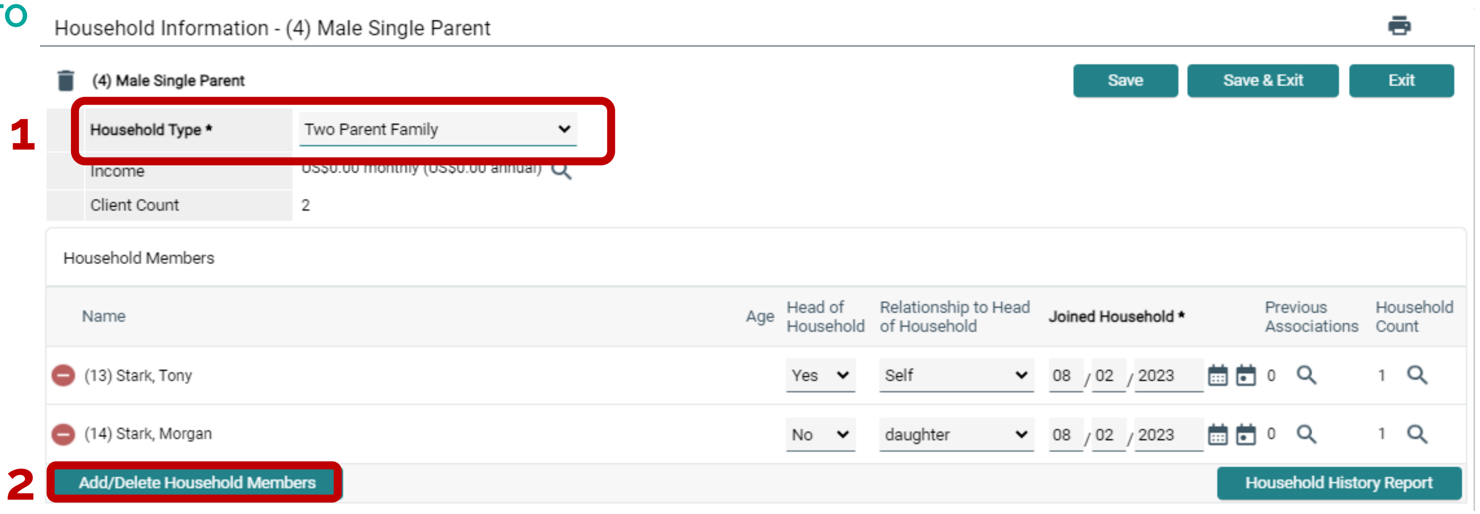
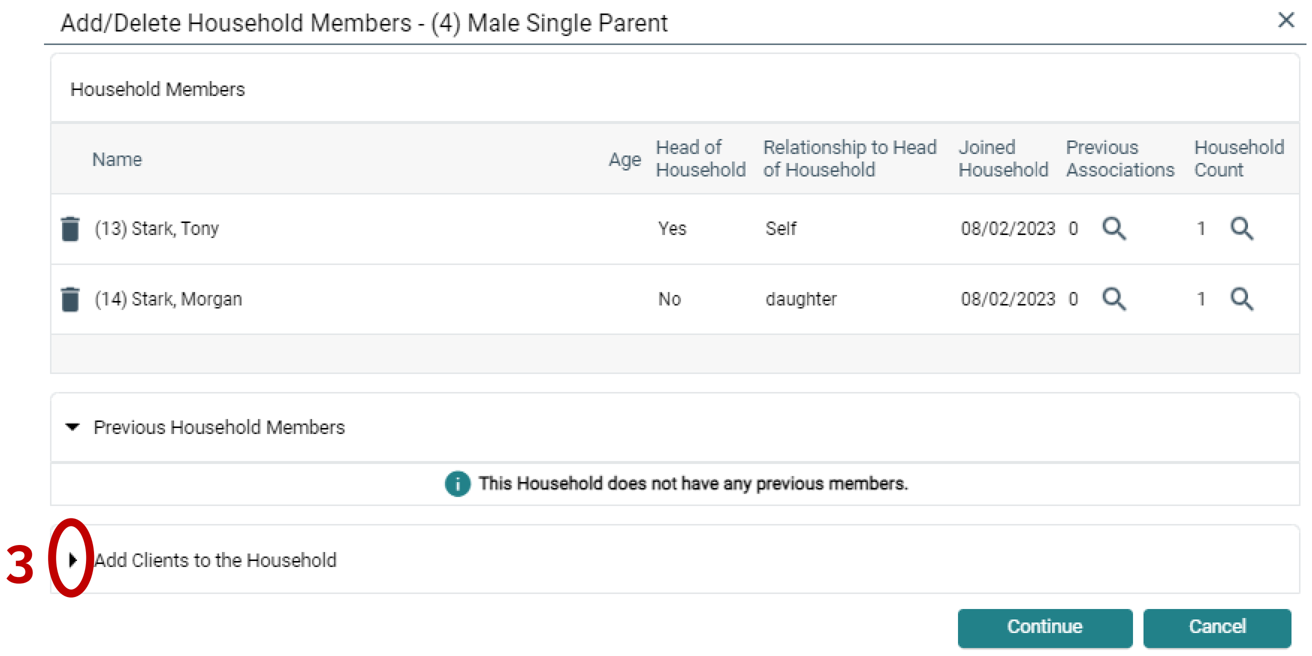


PHOTO # 2



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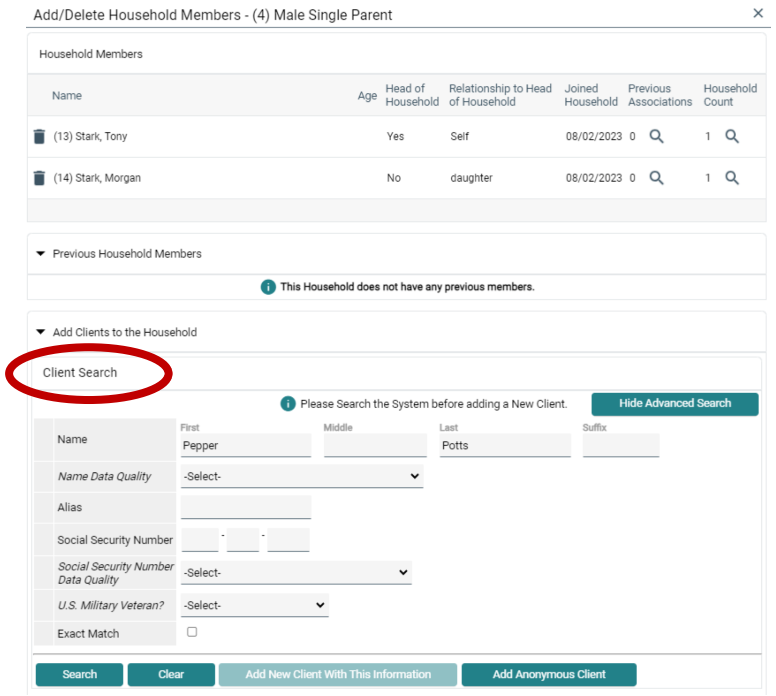

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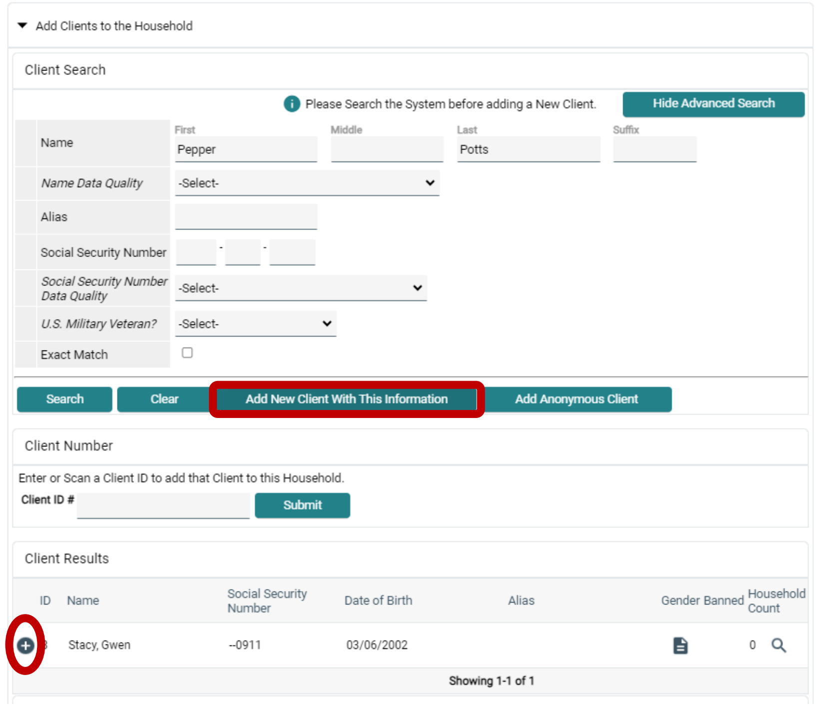
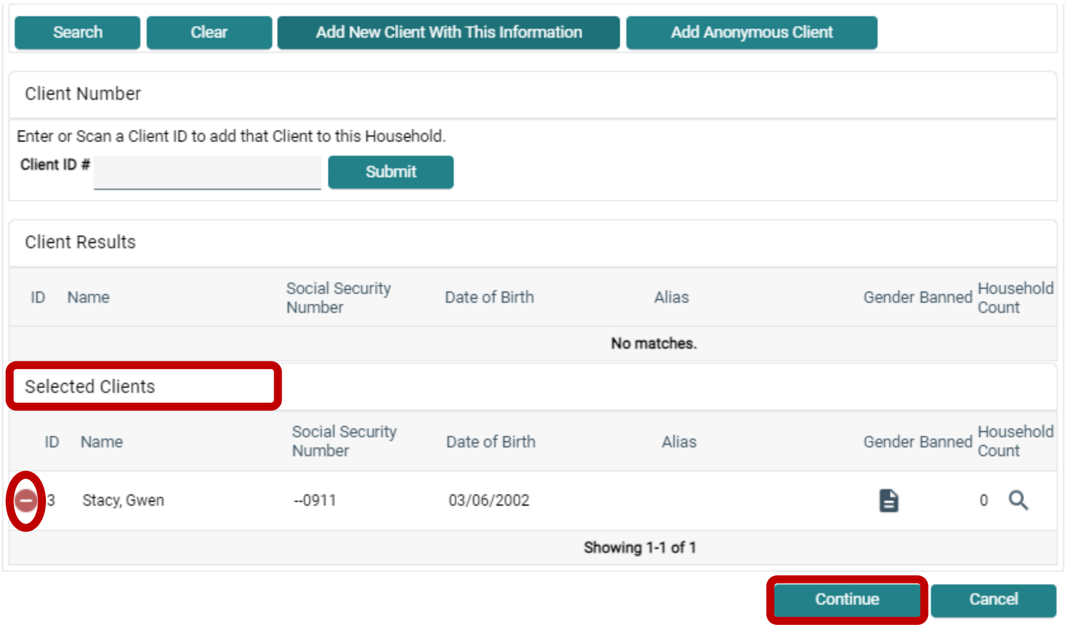


1. Use **Client Search** to check if a profile already exists
2. **Client Results**
   - If a profile exists, click on the green plus icon to add client
   - If none, select "Add New Client With This Information"
3. **Selected Clients**
   - Clients should appear here after Step 2
   - Click on red minus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



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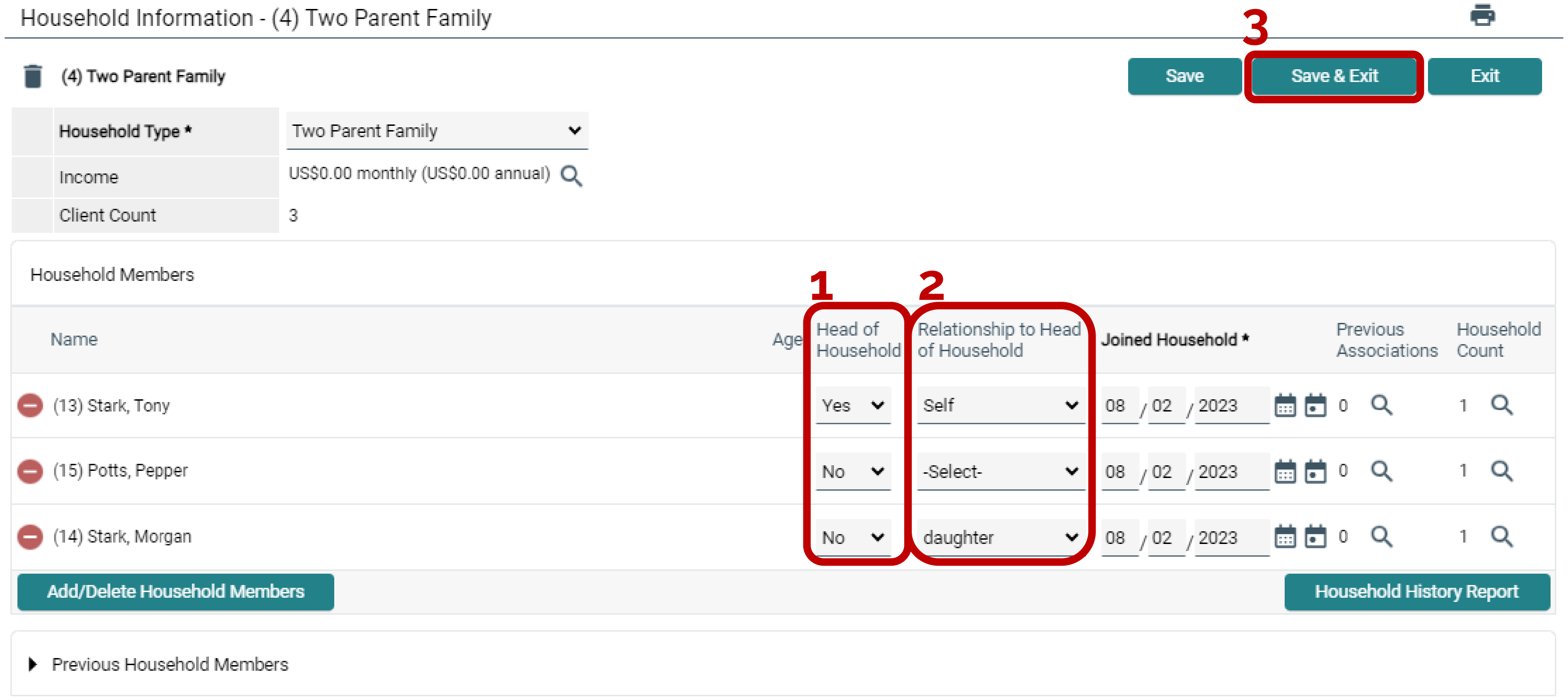
FINAL REMINDERS FOR ADDING TO EXISTING HOUSEHOLDS

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

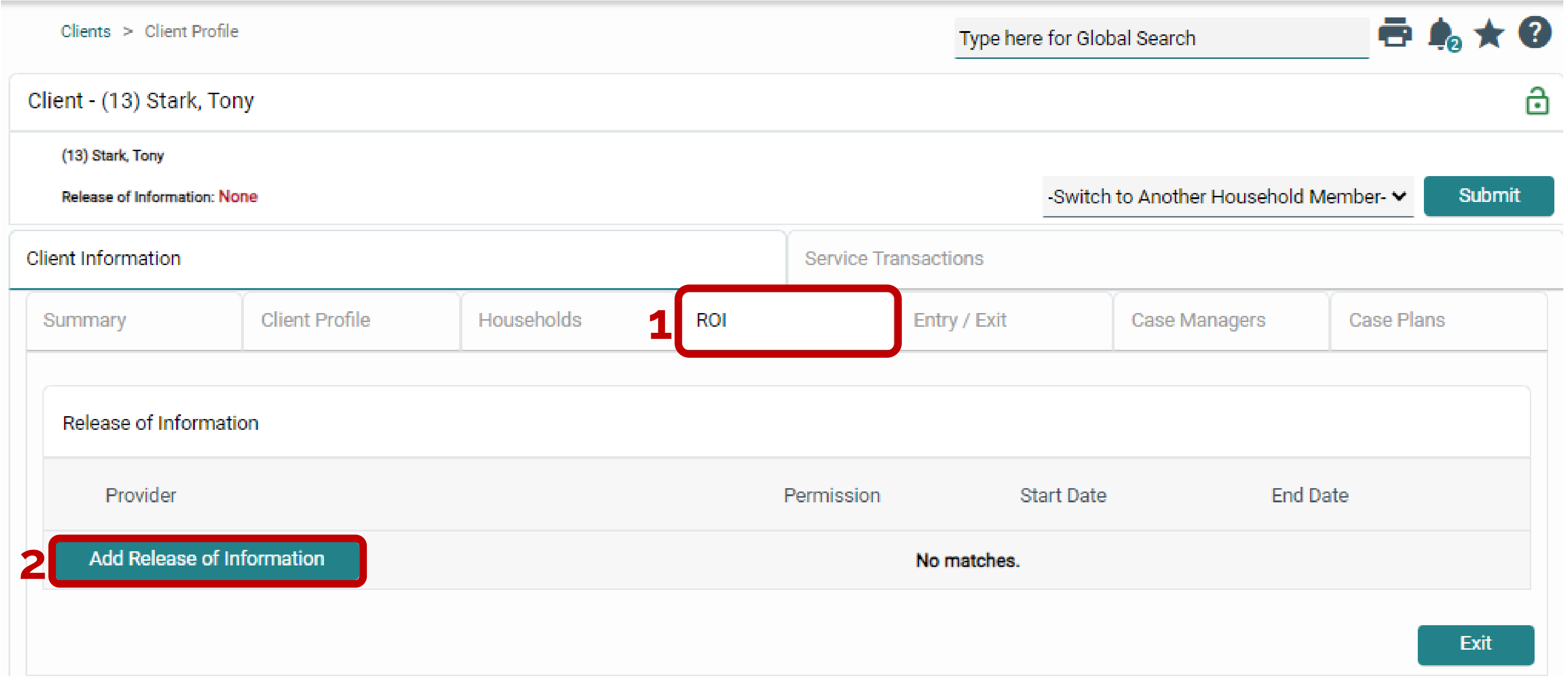
NOTE: The household is complete if every member that your project is serving is under the same household group



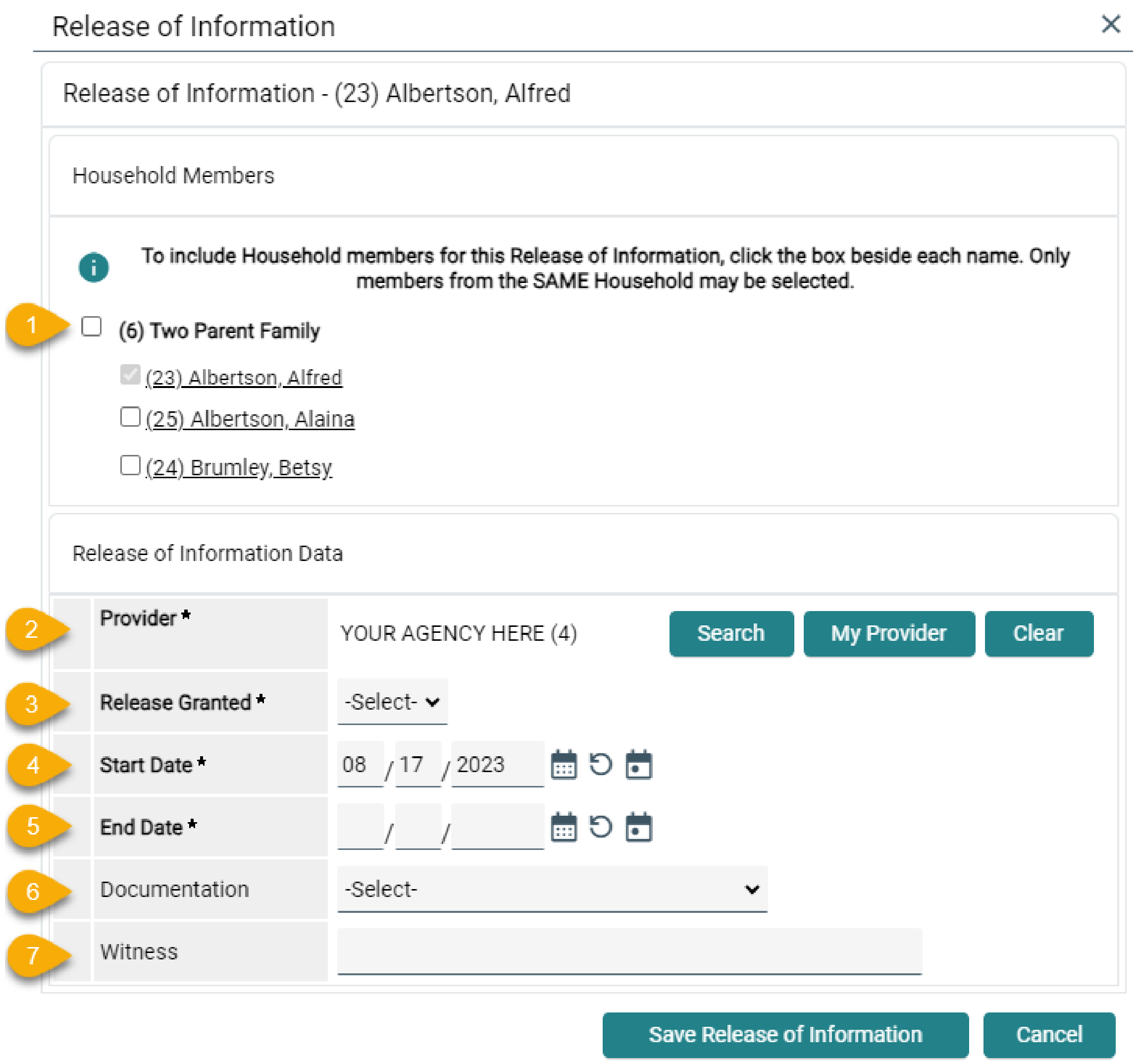
HOW TO ADD A RELEASE OF INFORMATION (ROI)

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

2. Select **Add Release of Information**



RELEASE OF INFORMATION

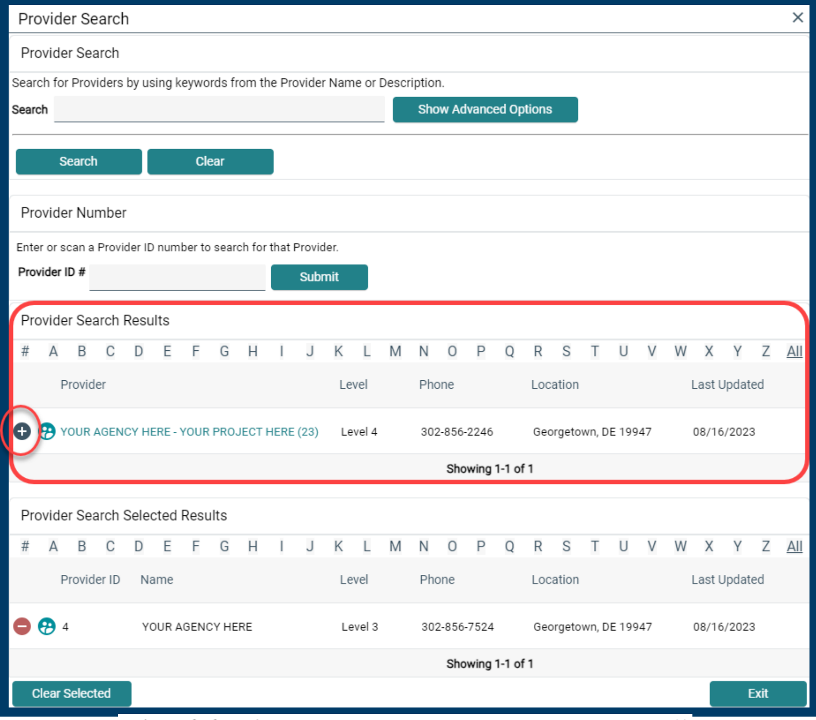


<u>TWO</u> ROIs MUST BE ADDED.

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.

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.



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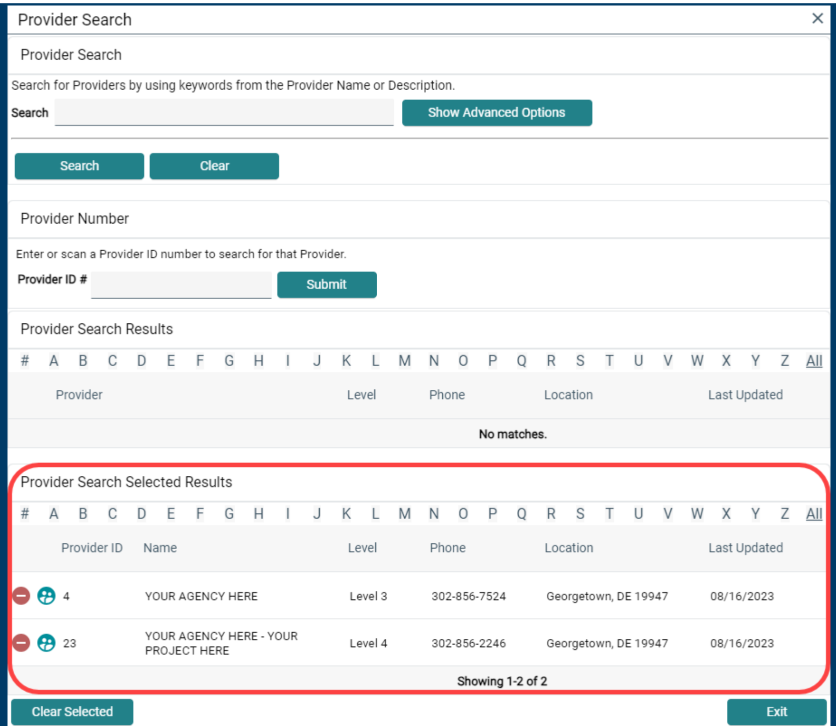

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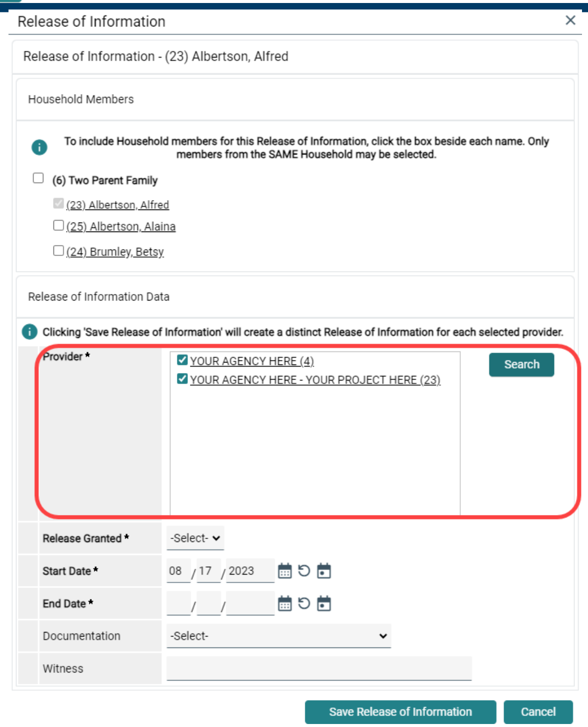

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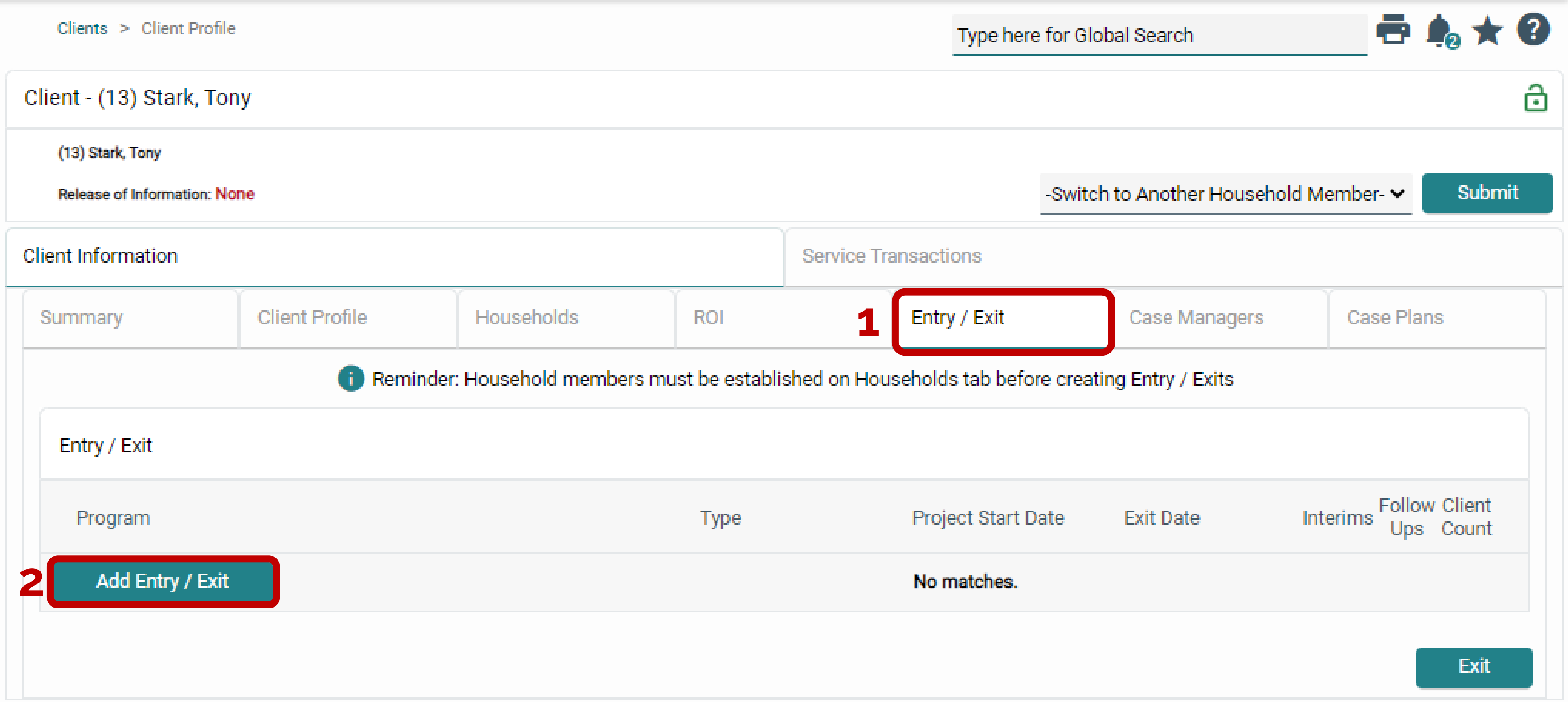
HOW TO ADD A PROJECT ENTRY – ENTRY/EXIT

1. Navigate to the **Entry/Exit** tab

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



STARTING THE PROJECT ENTRY

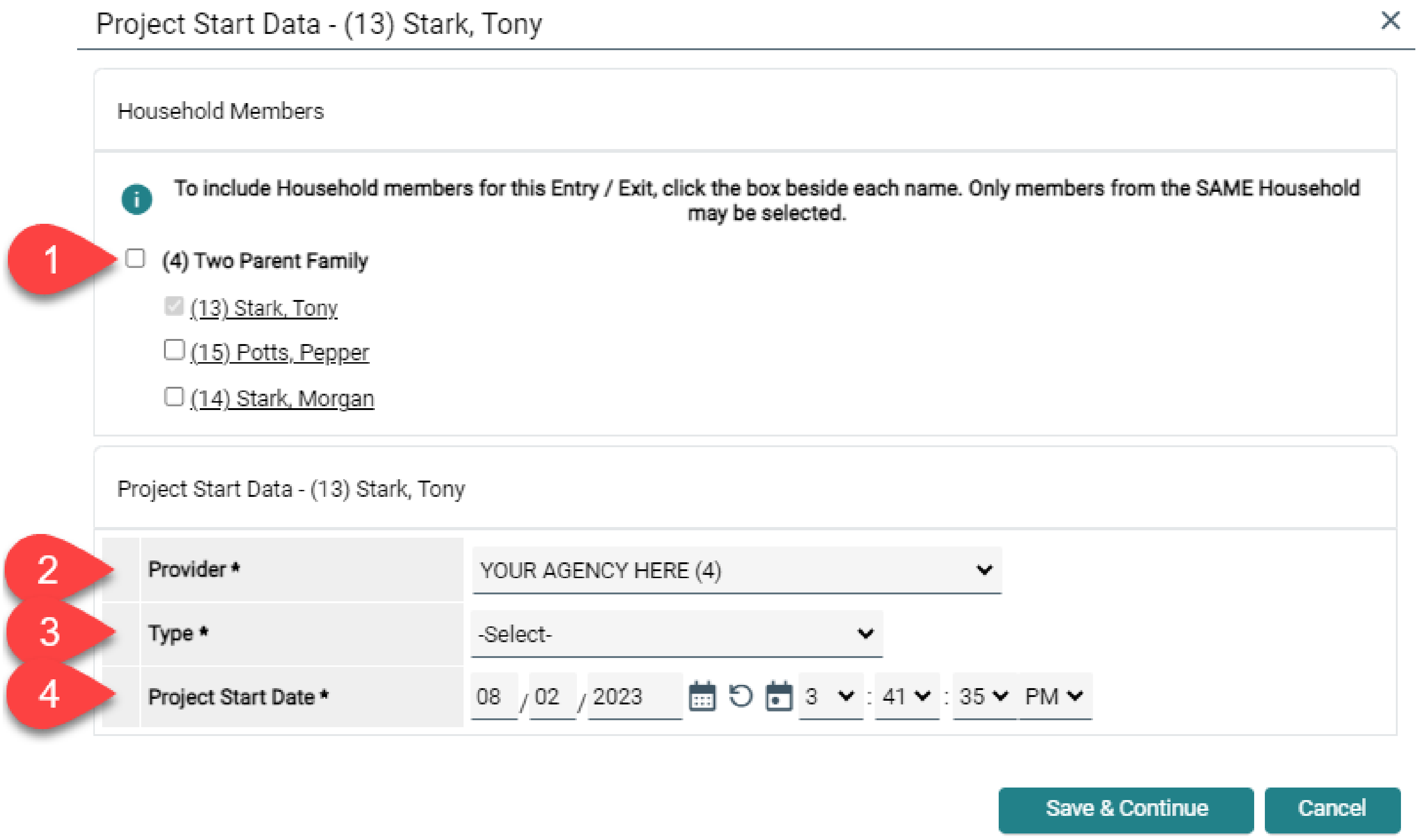
1. Check off each client entering your project

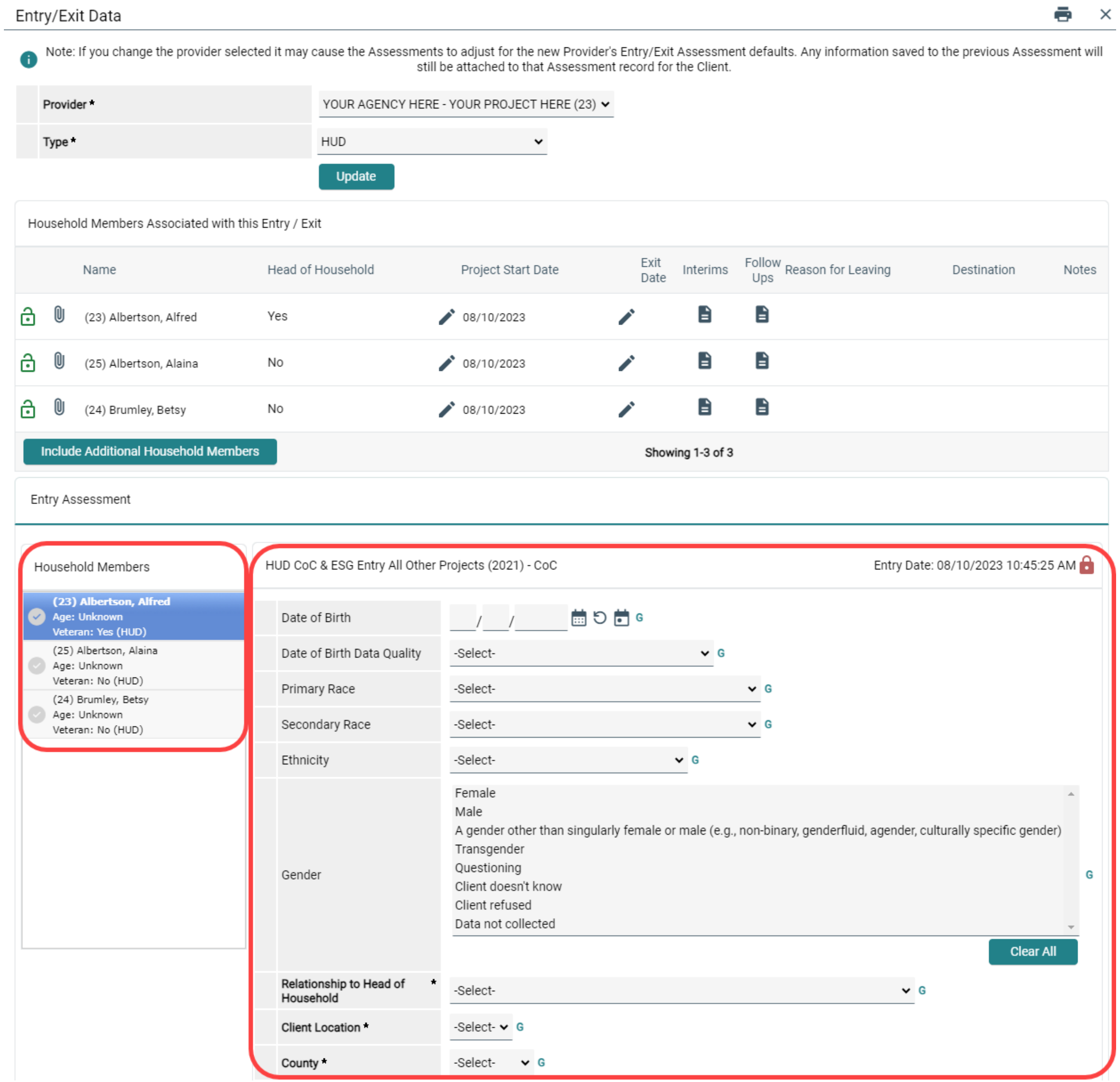
2. For Provider, select your specific project

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.





COMPLETING ENTRY ASSESSMENT

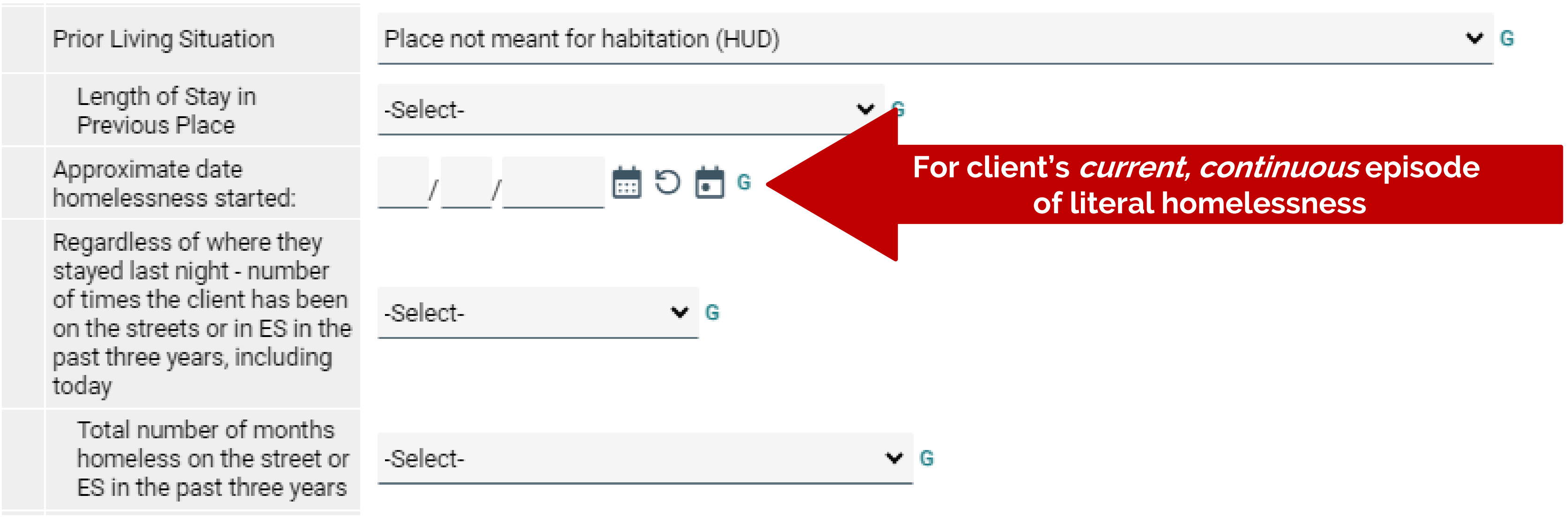
Notes:

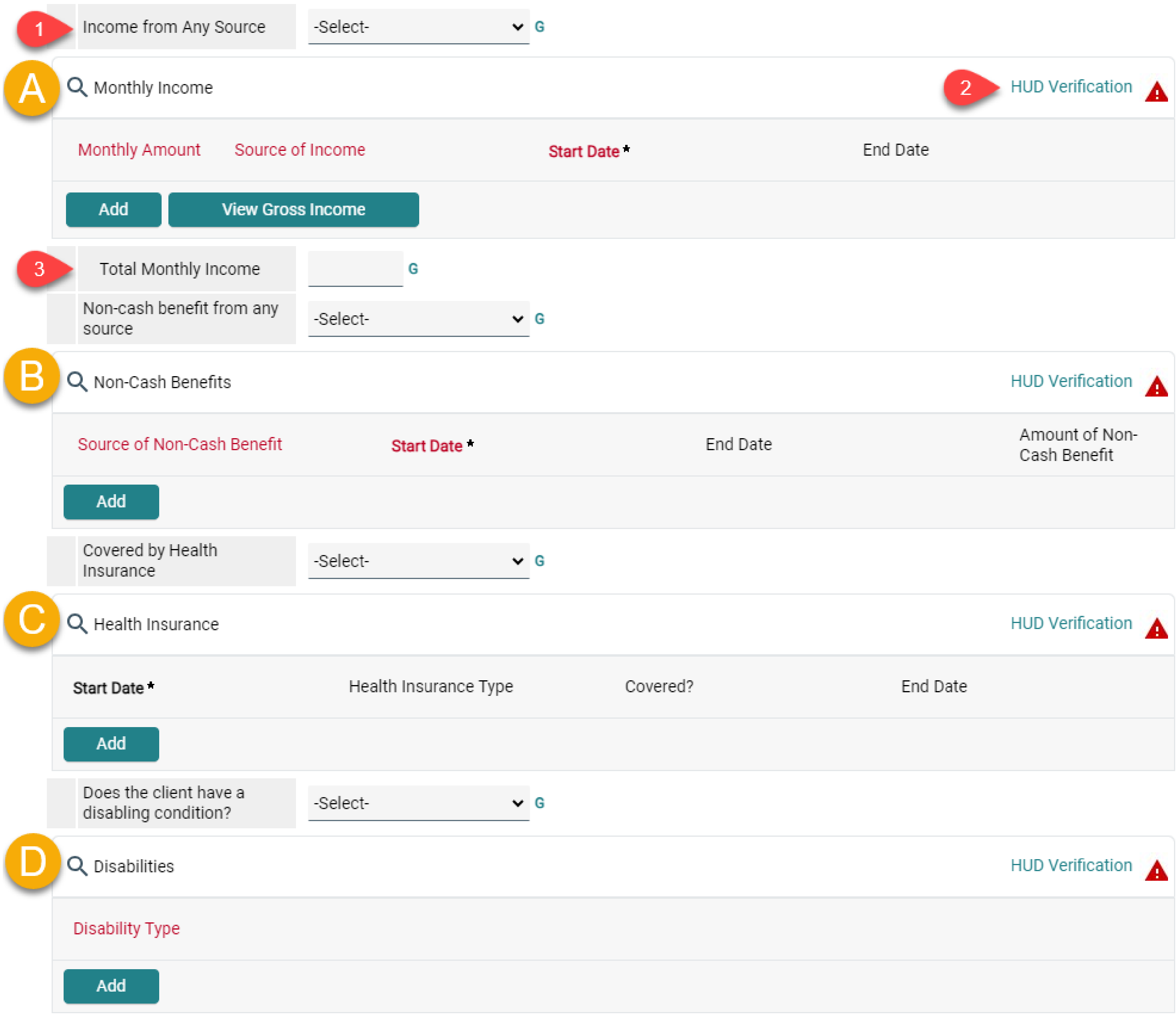
- Information needs to be **updated** for *each client in each enrollment*, even when fields are not blank
- Assessments for all additional household members must be completed
  - Data from adults *do not* autofill fields for children
- Switch to the next client using Household Members section

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





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

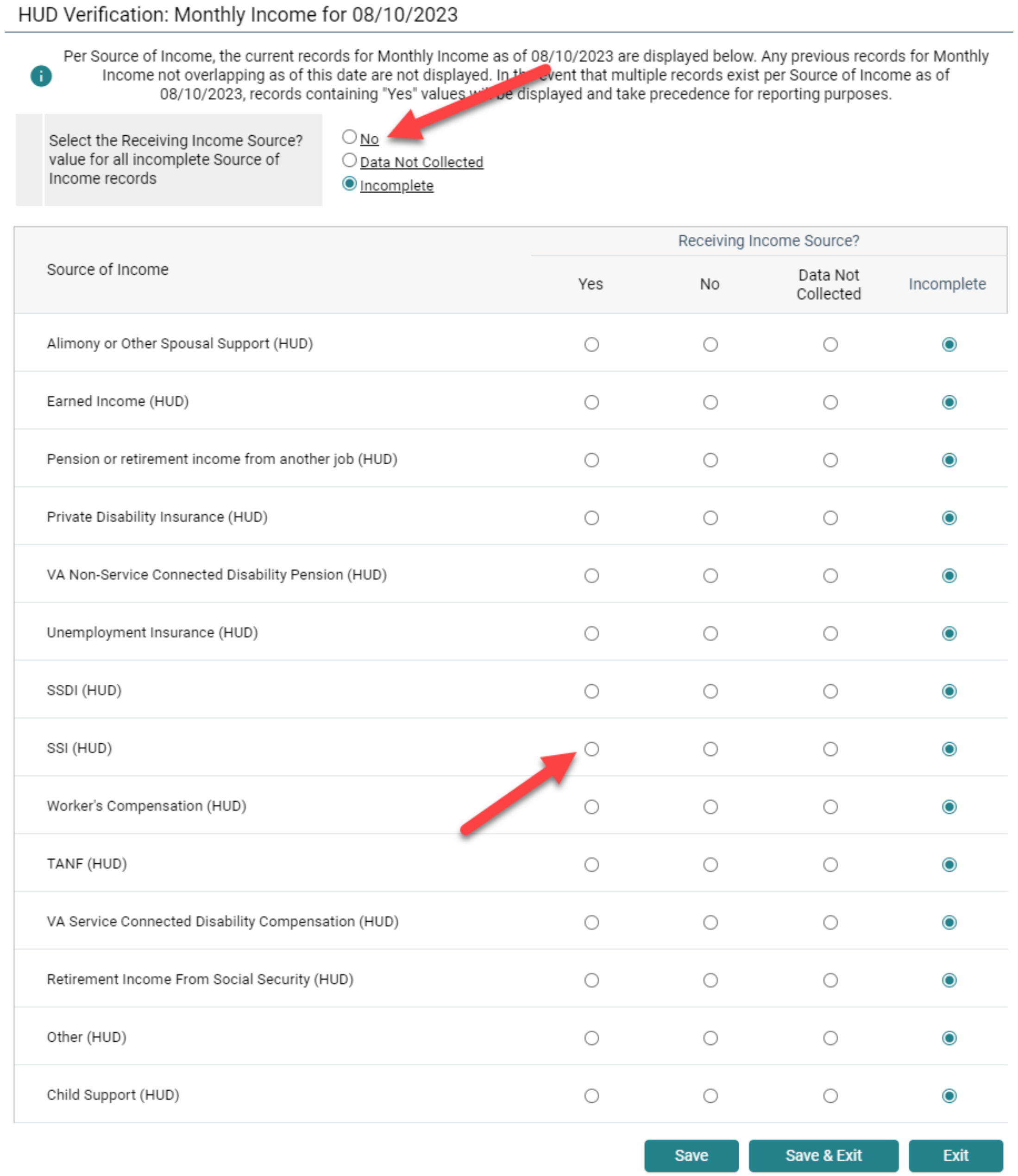
1. Select if Yes/No
2. Match with HUD Verification
   - If 'Yes' is selected for anything, type in additional data such as amount
   - The red triangle will change to a check mark when completed

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.

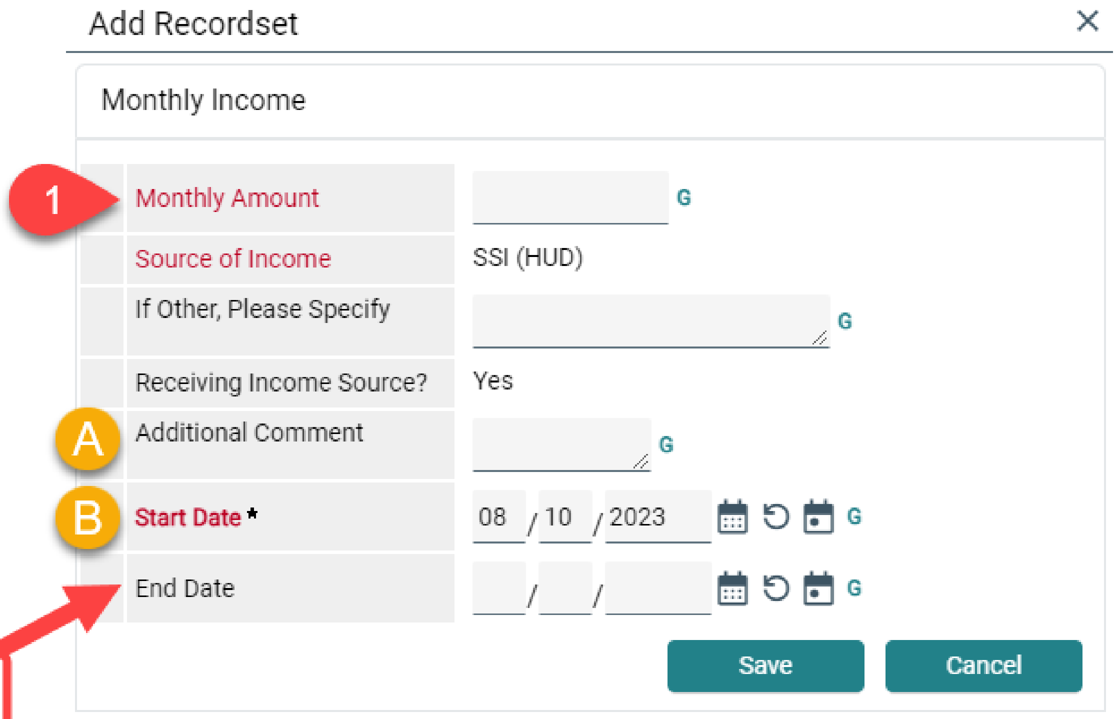
Select the Receiving Income Source? value for all incomplete Source of Income records

- ○ No
- ○ Data Not Collected
- ◉ Incomplete

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

Save | Save & Exit | Exit

ENTRY ASSESSMENT: YES TO ANY INCOME



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

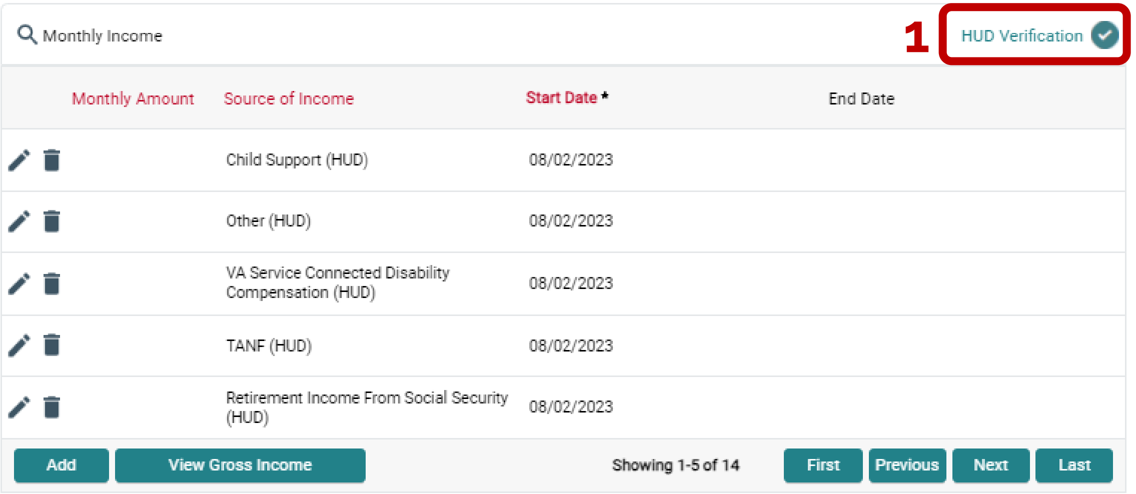
End Date should be the **day before** the next update.

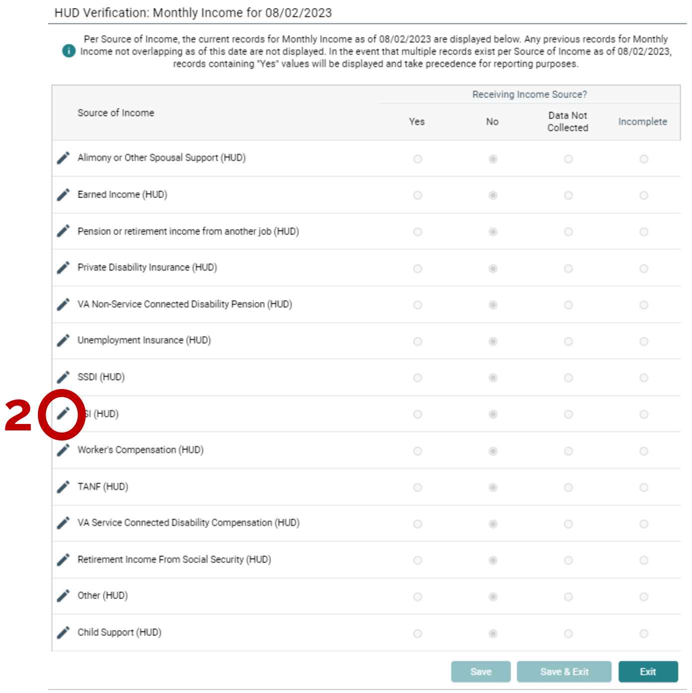
1. Type in Monthly Amount

A. Feel free to include any Additional Comments for better tracking

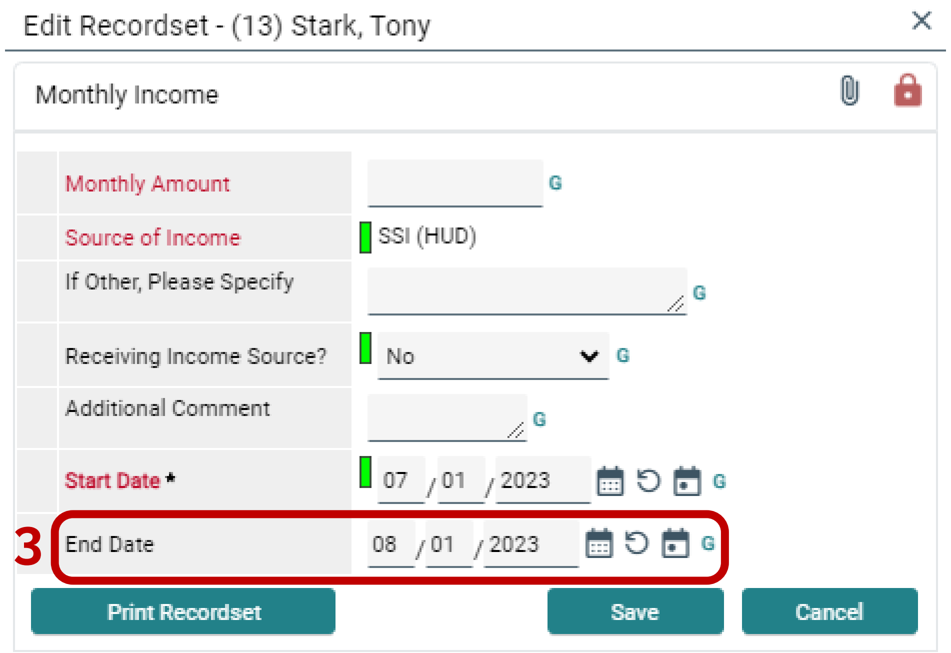
B. The Start Date is set to match the Project Start Date. For more accurate tracking, this date can be changed to when client started receiving income source.

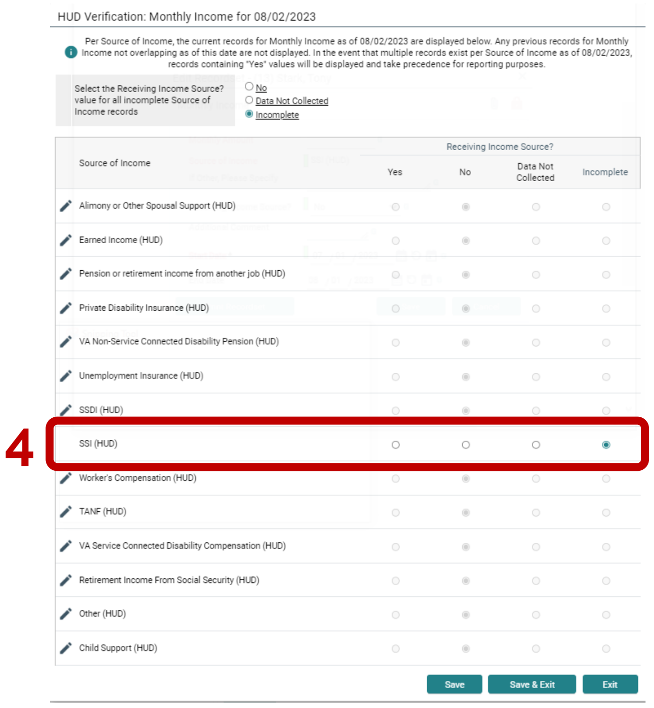
UPDATING SUB-ASSESSMENT

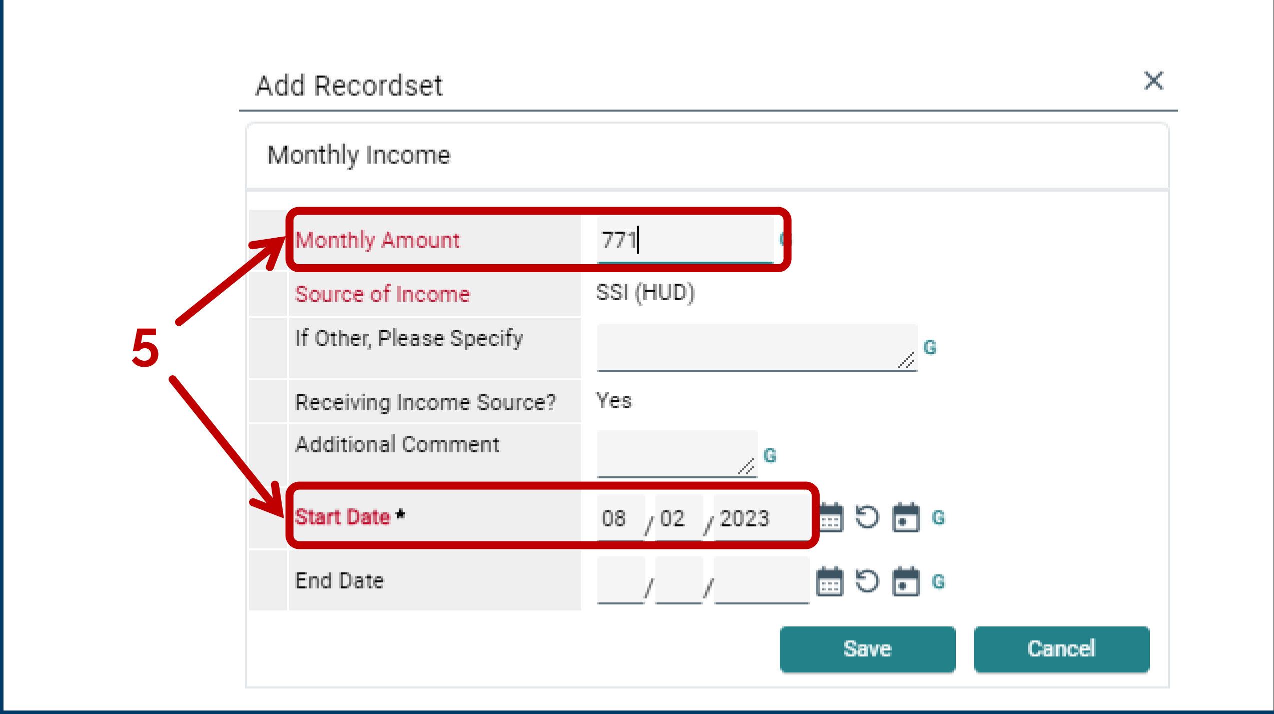




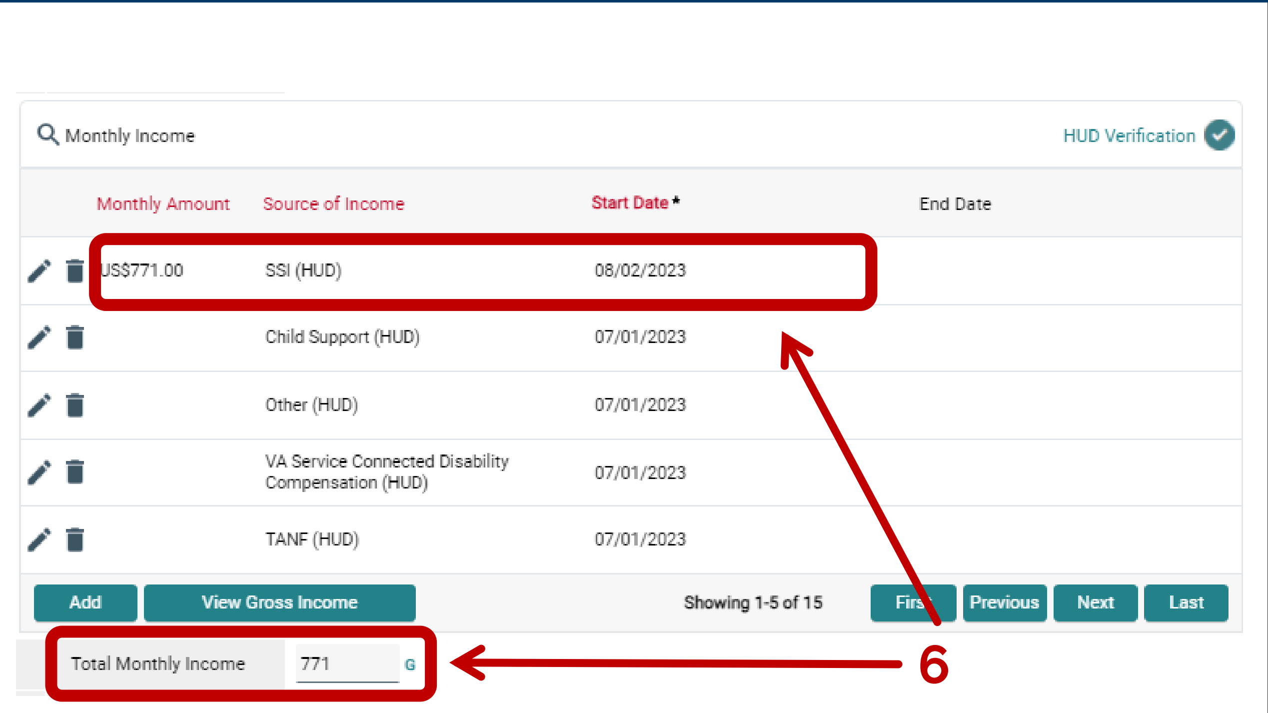
1. If there is previous information saved, click on **HUD Verification** to update any sub-assessment
   - Applies to Income, Non-cash benefits, Insurance, Disability
2. Ensure this reflects the client's information *upon entry*. **To make changes, click on the pencil icon** for any applicable source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

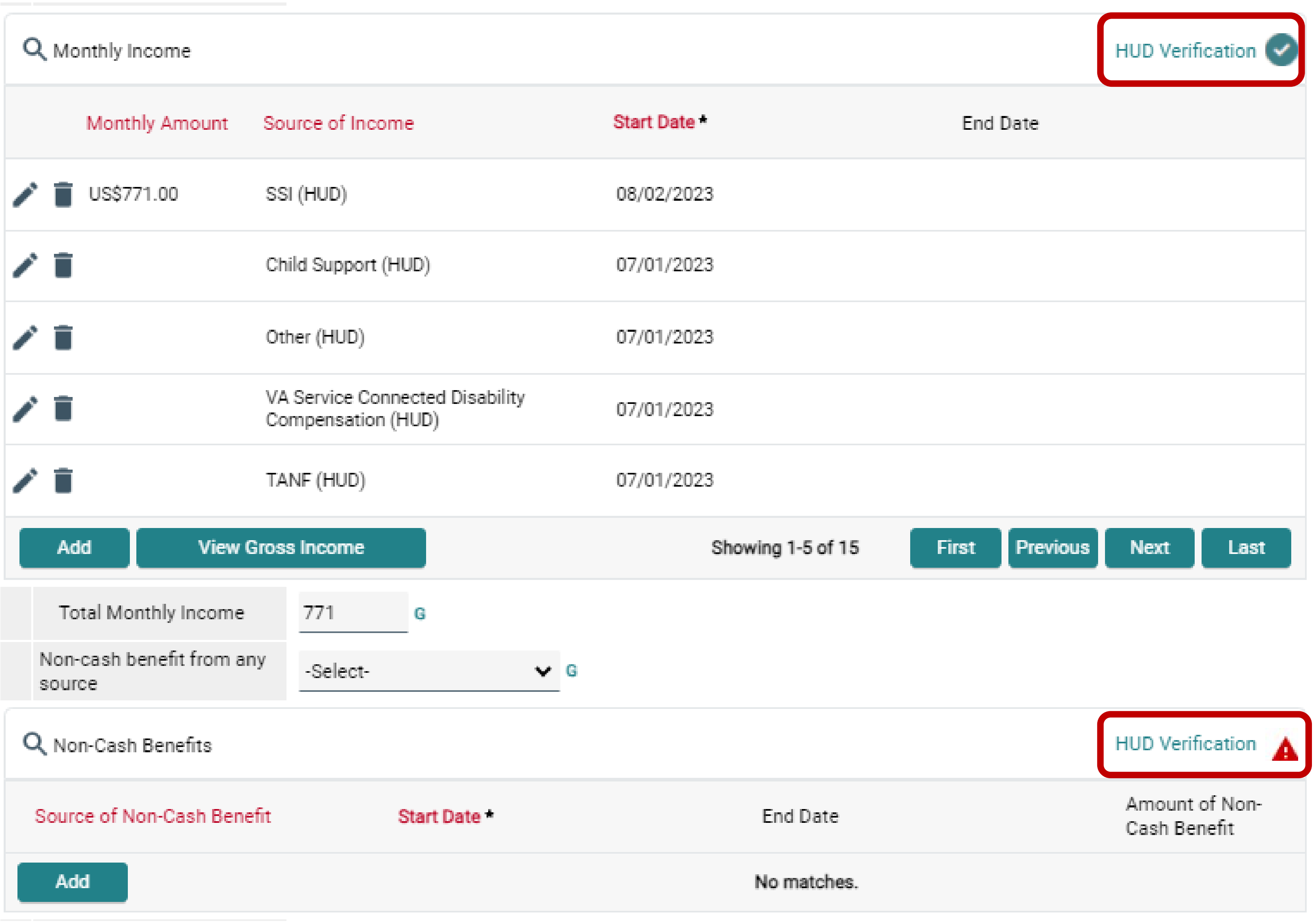






4. A line item should now be Incomplete after closing out a previous entry record.
   - Now, select the applicable answer
5. If Yes is selected, add the **new Monthly Amount** and **new Start Date**
   - Click Save, and Exit the HUD Verification window
6. A new entry will be reflected on the table
 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





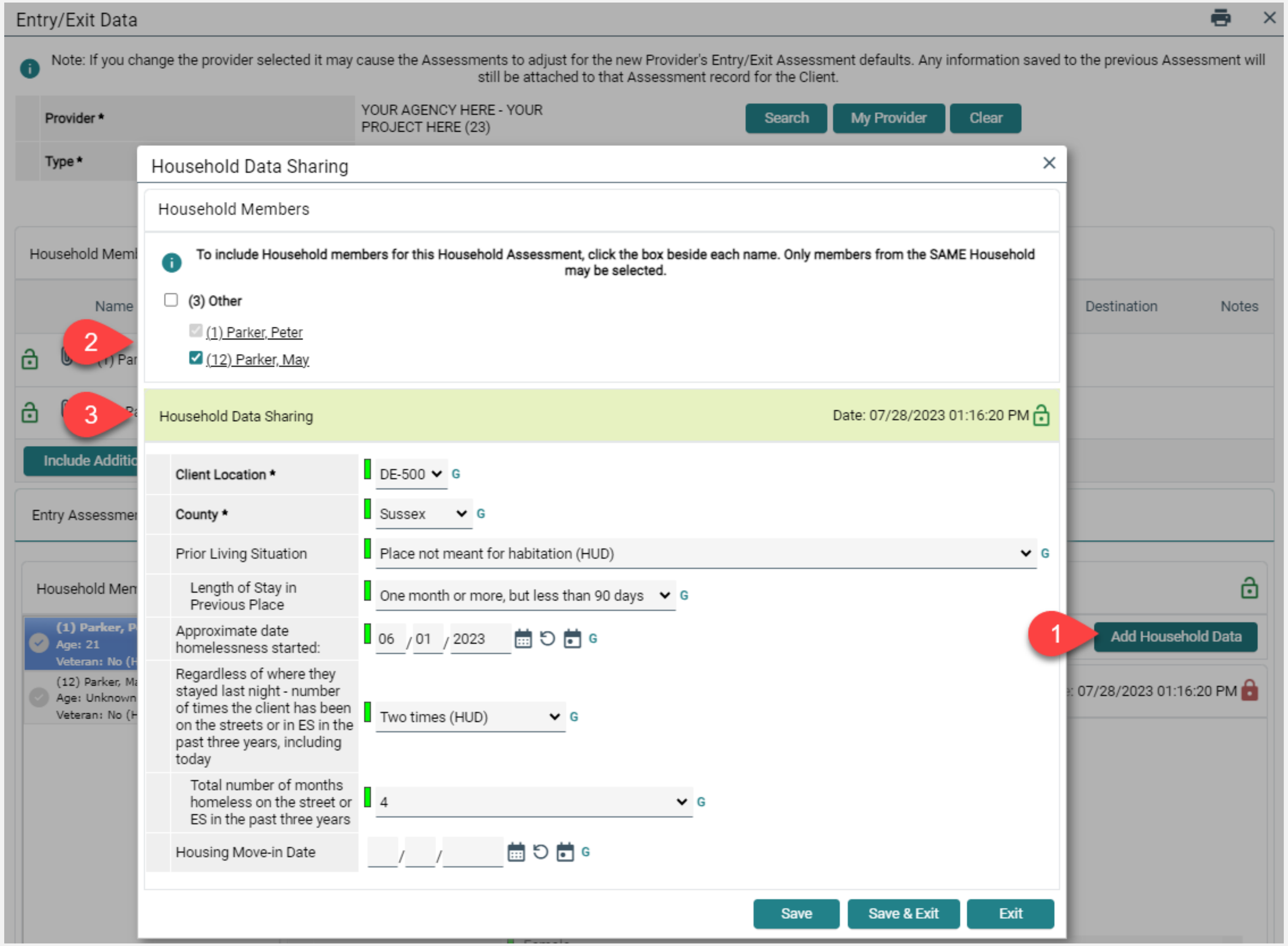
COMPLETING HUD VERIFICATION AND ENTRY ASSESSMENT

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

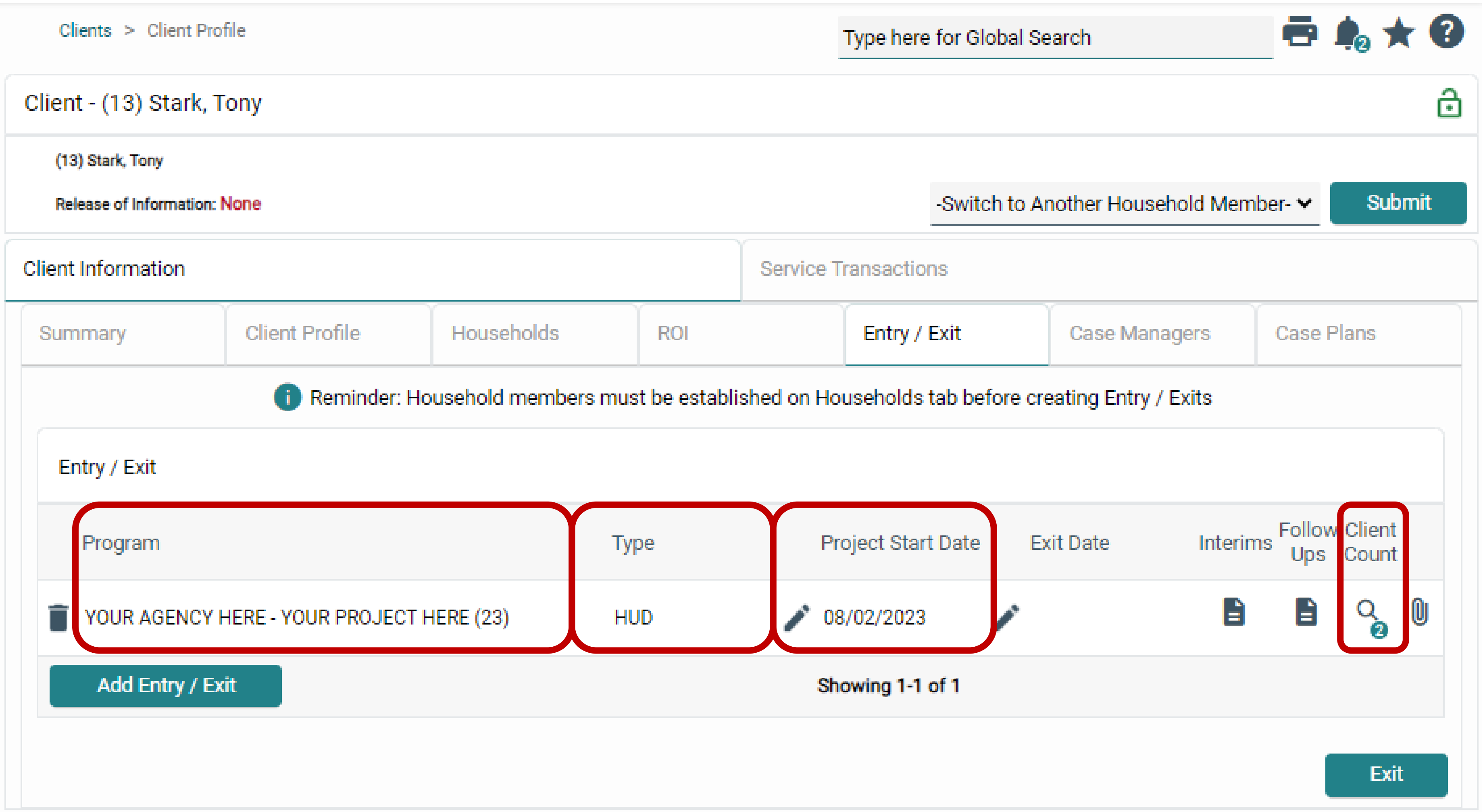
- When updating entry assessments for a household, some data can be shared from the Head of Household to other Household Members.
- Use the **Household Data Sharing** to select which Household Members share the same:
  - County/Location
  - Prior Living Situation
  - Length of Time Homeless
  - Housing 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

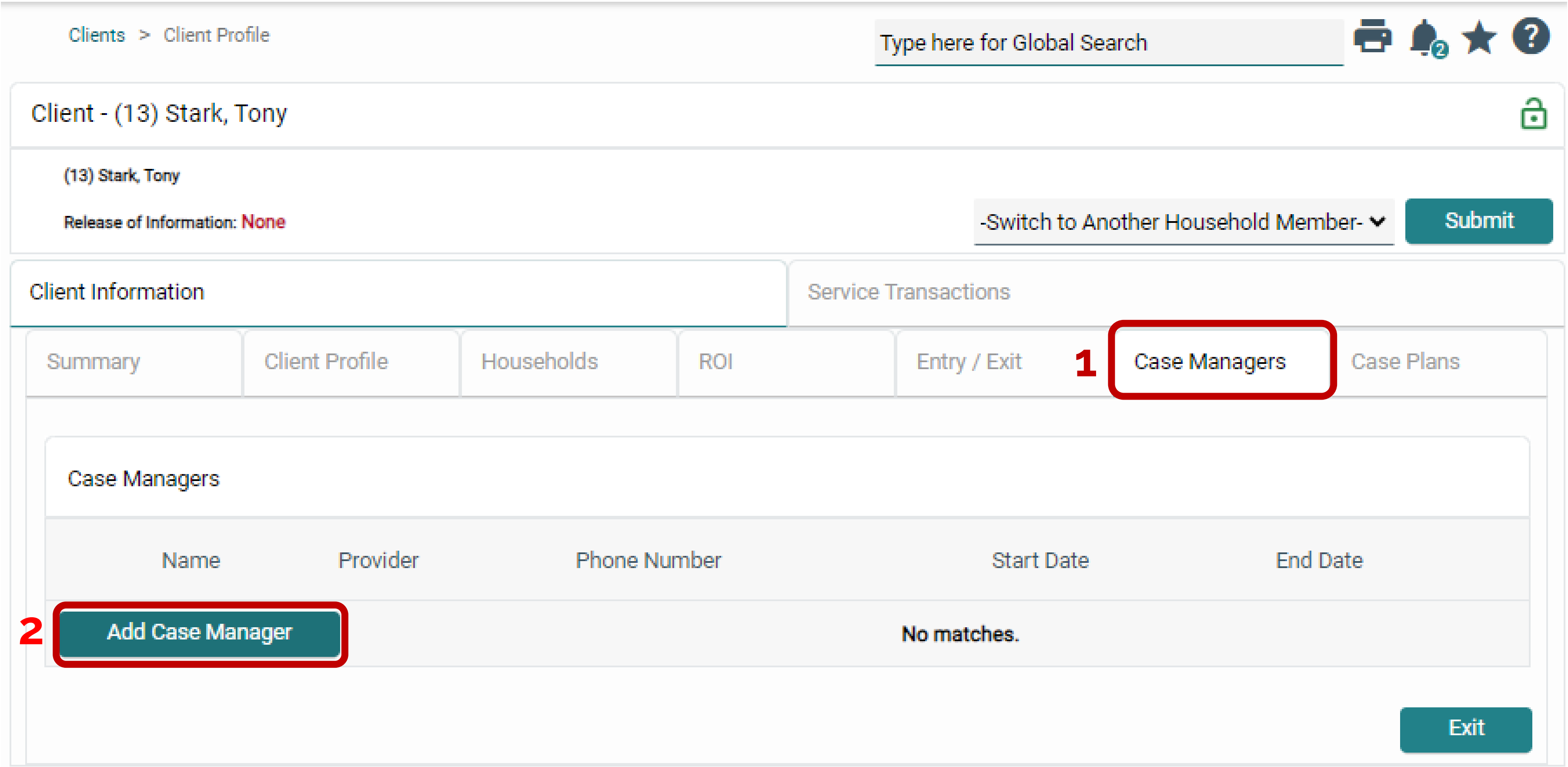


HOW TO ADD CASE MANAGERS

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

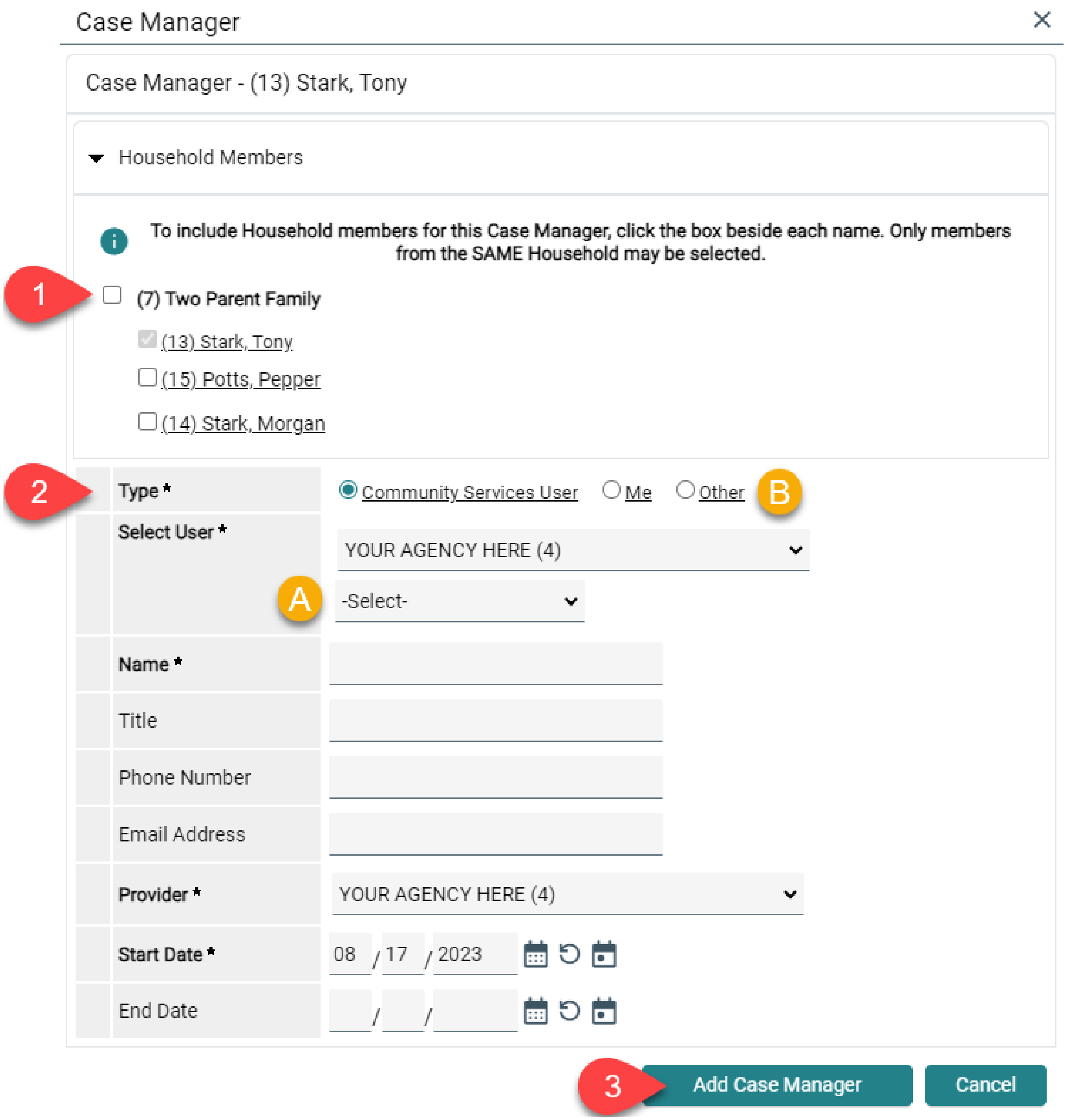
2. To add information, select **Add Case Manager**.

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



ADDING A CASE MANAGER

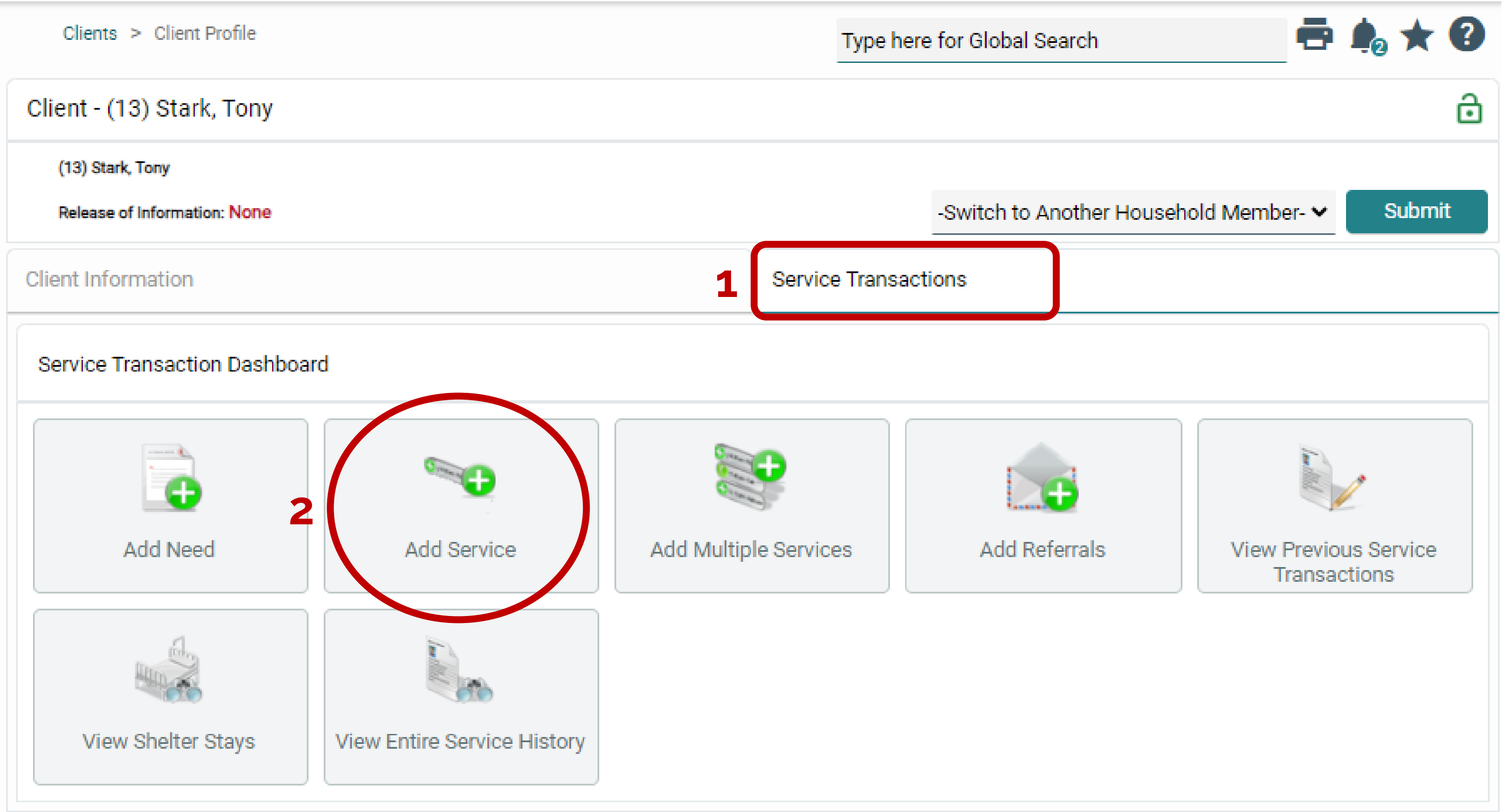
1. Select the household member(s) working with the Case Manager
2. Select:
   - **Select User** from the drop-down for someone in your organization.
   - **Other**, then fill out contact information, if Case Manager is not a CMIS user.
3. Click Add Case Manager



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**.

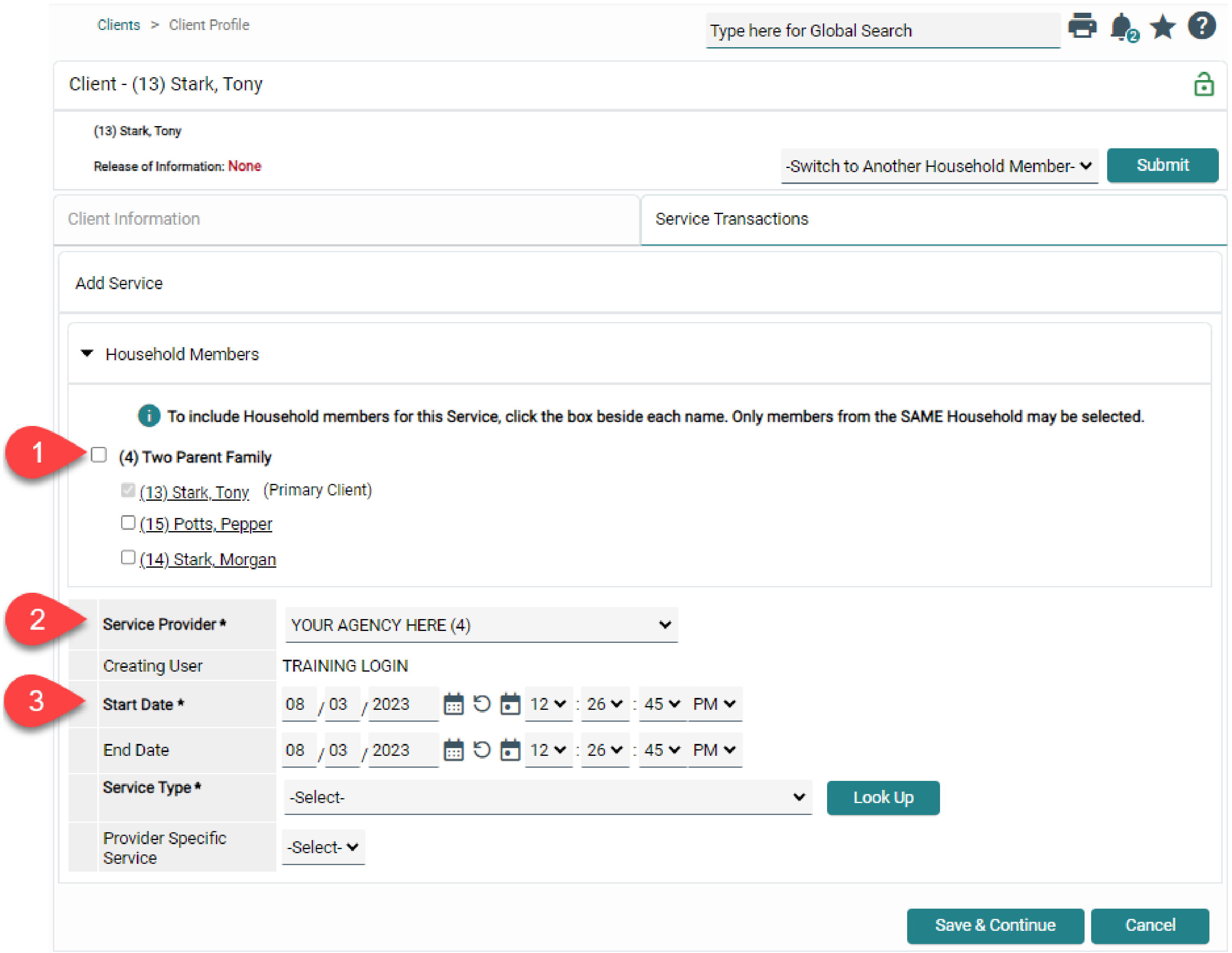


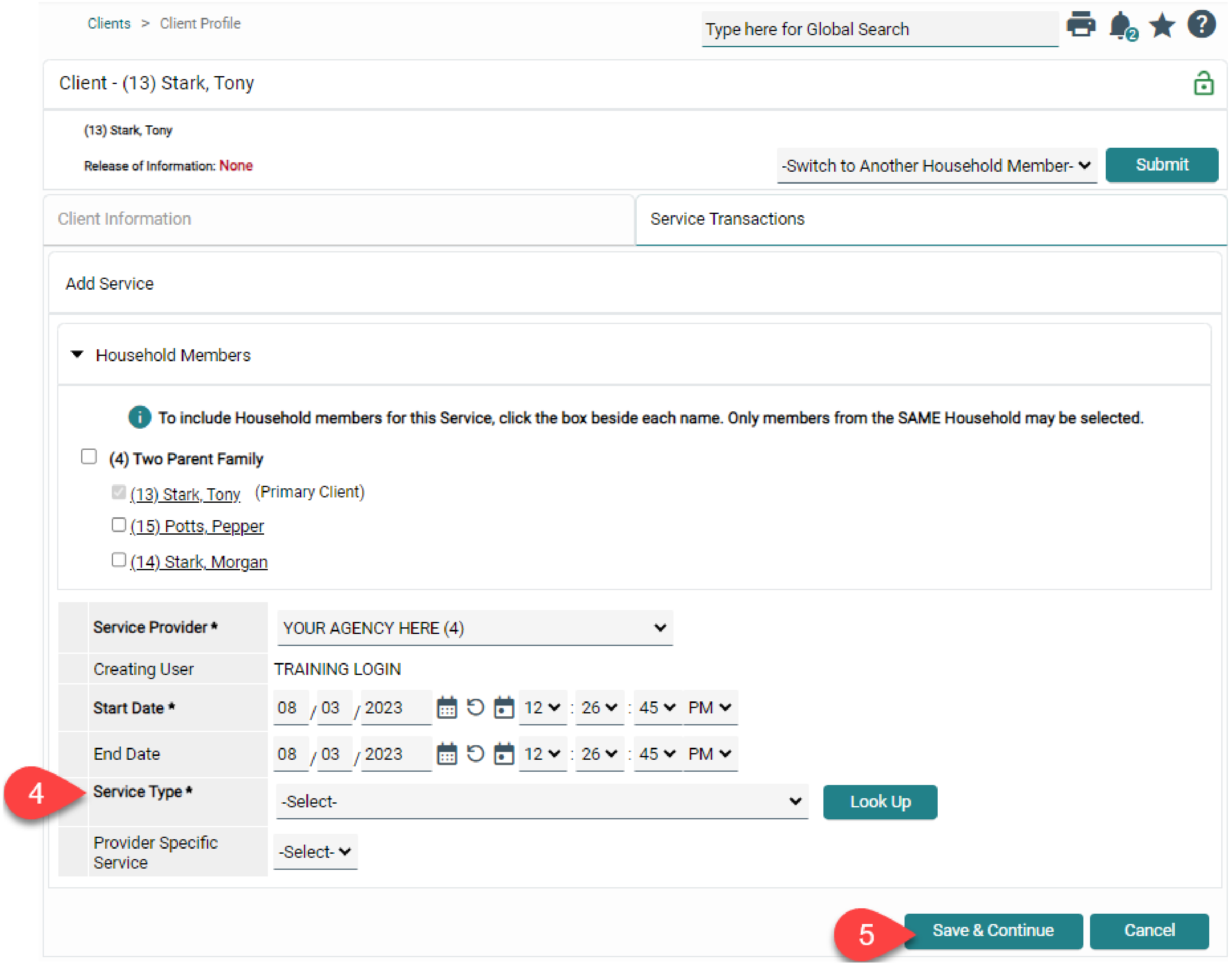
USED BY:

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

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.





ADDING A SERVICE TRANSACTION

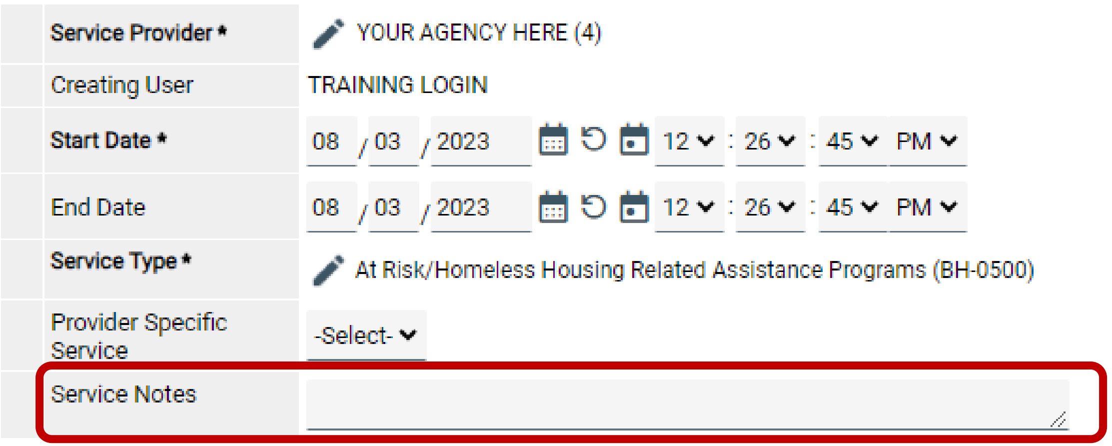
1. Select applicable **Service Type**
   - Options differ by **Service Provider**
2. Click on **Save & Continue**

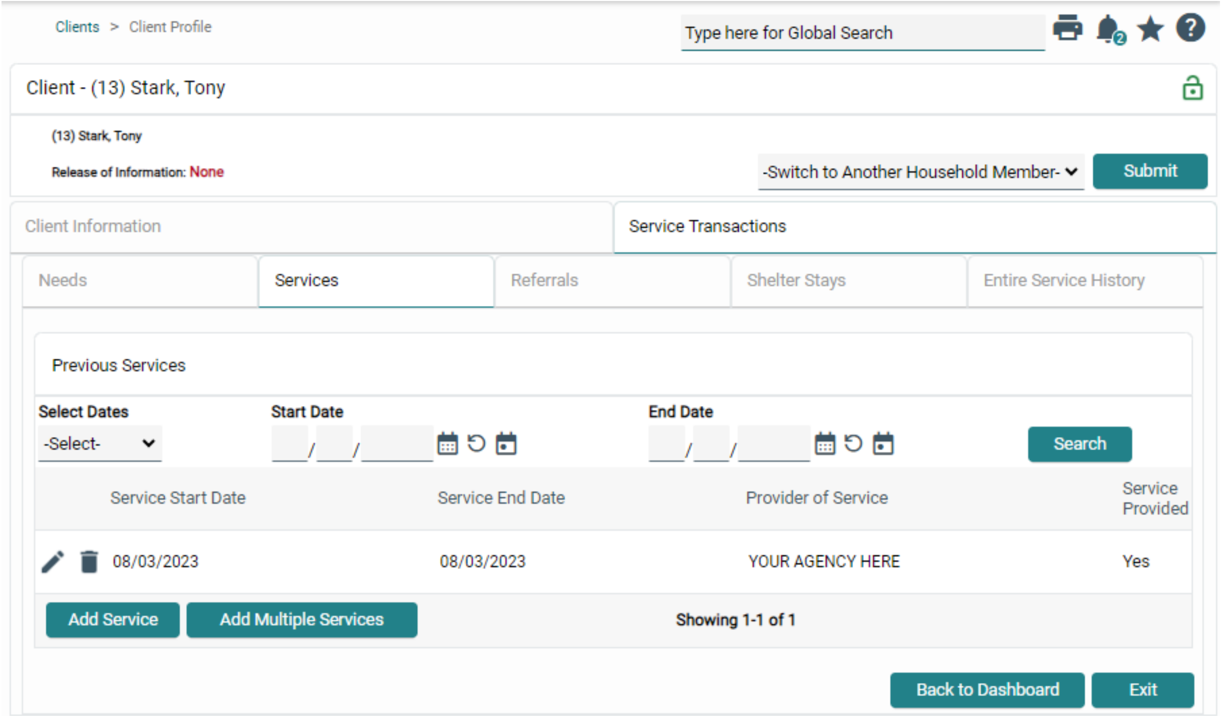
NOTE: If the service type you need is not listed –

- 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





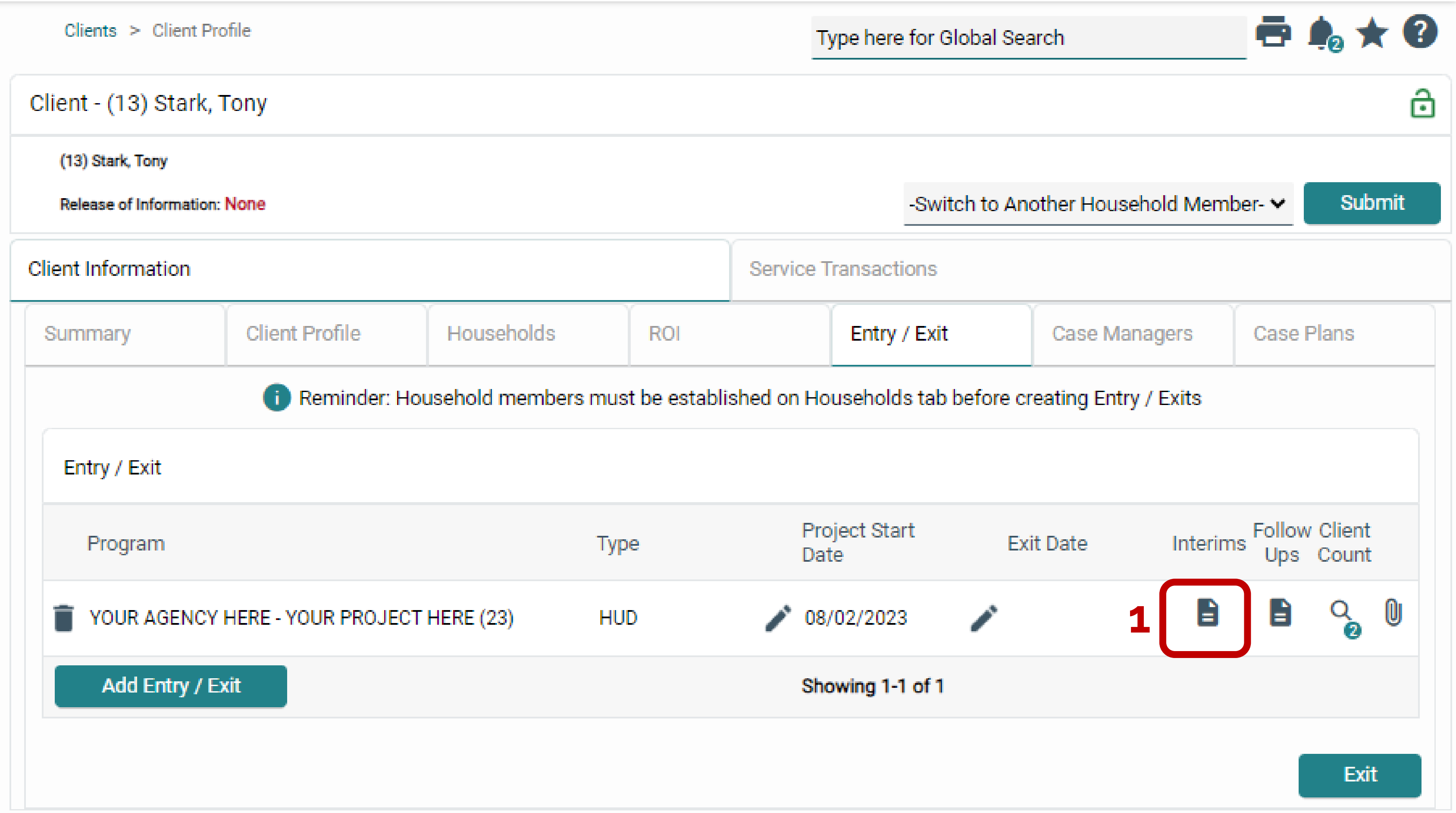
INTERIMS: WHEN TO ADD AN UPDATE

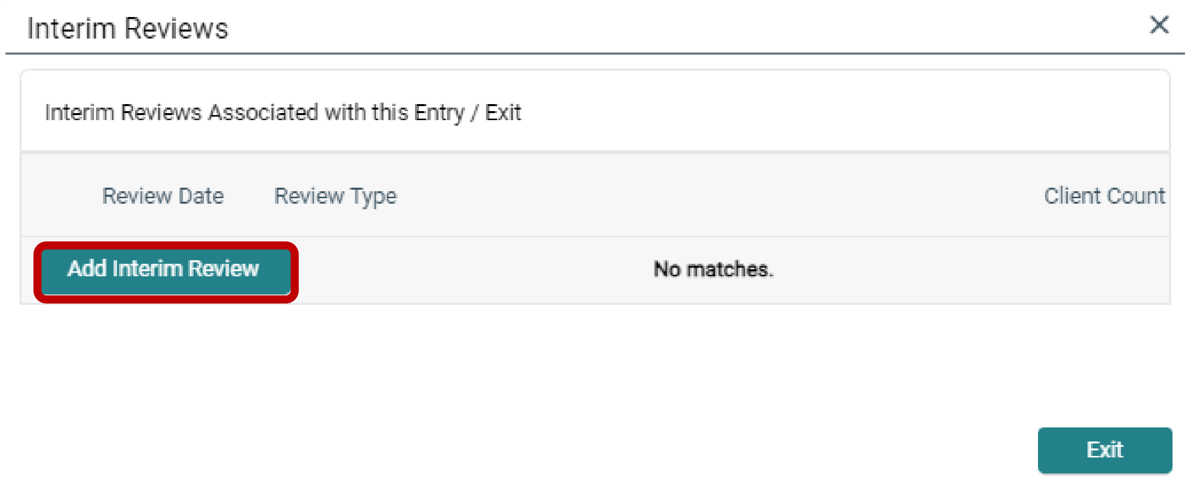
For each life change in any of the following categories:

- 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





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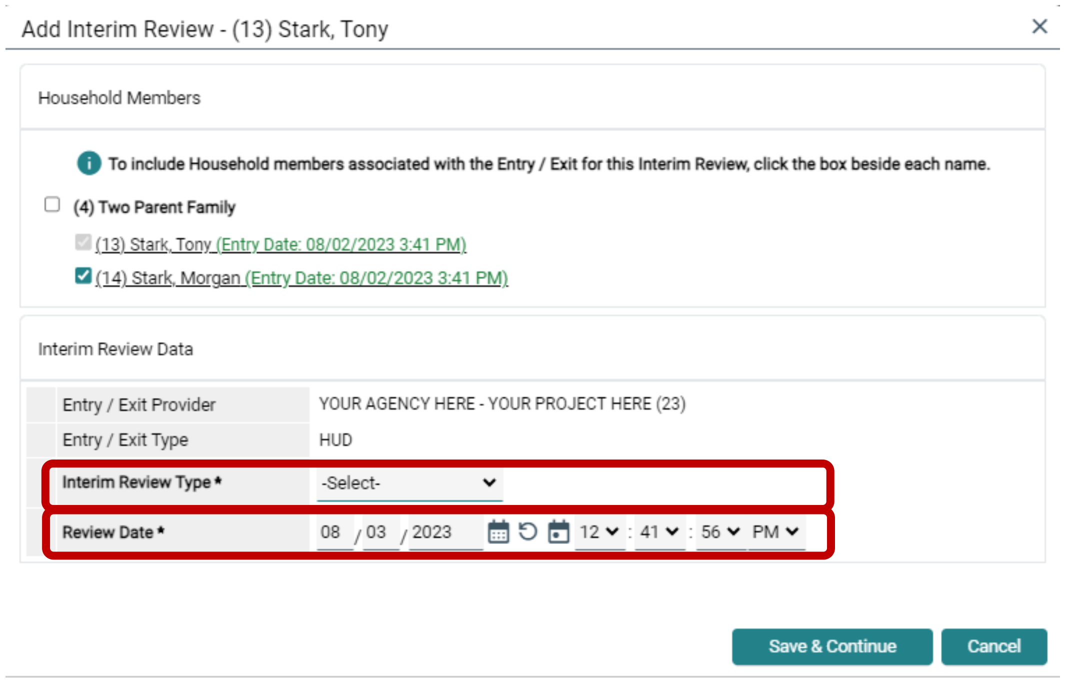

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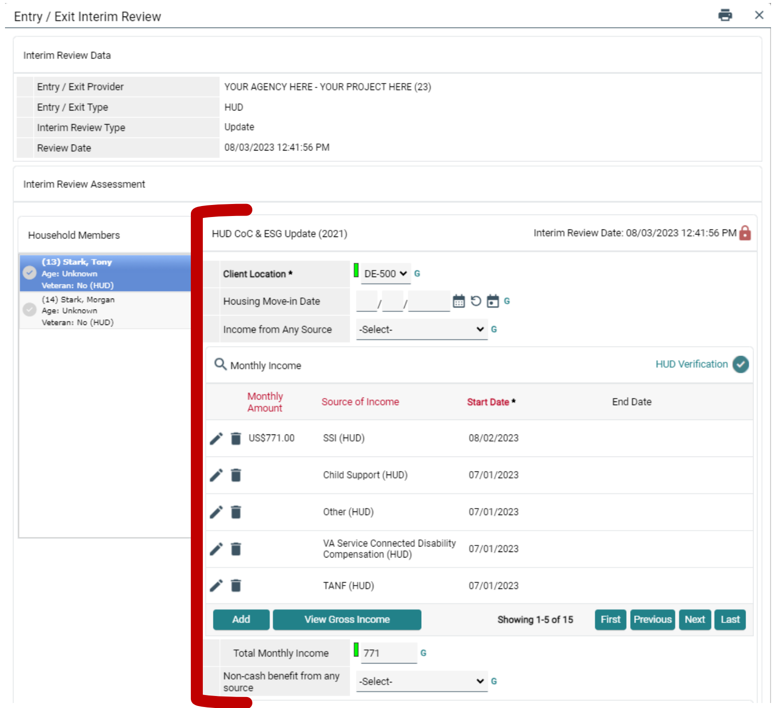
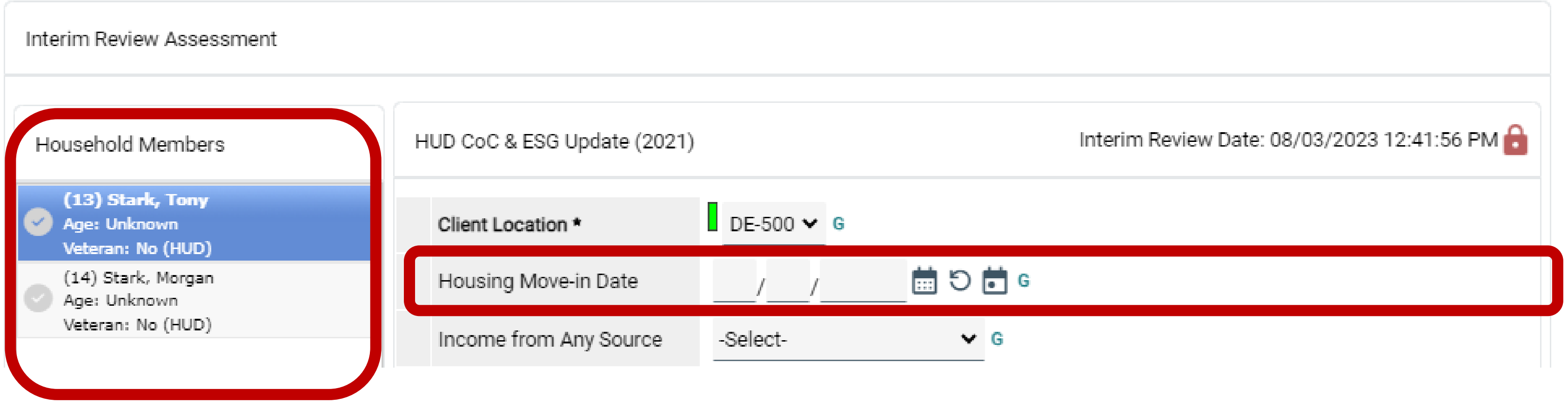


4

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

ADDING A HOUSING MOVE-IN DATE

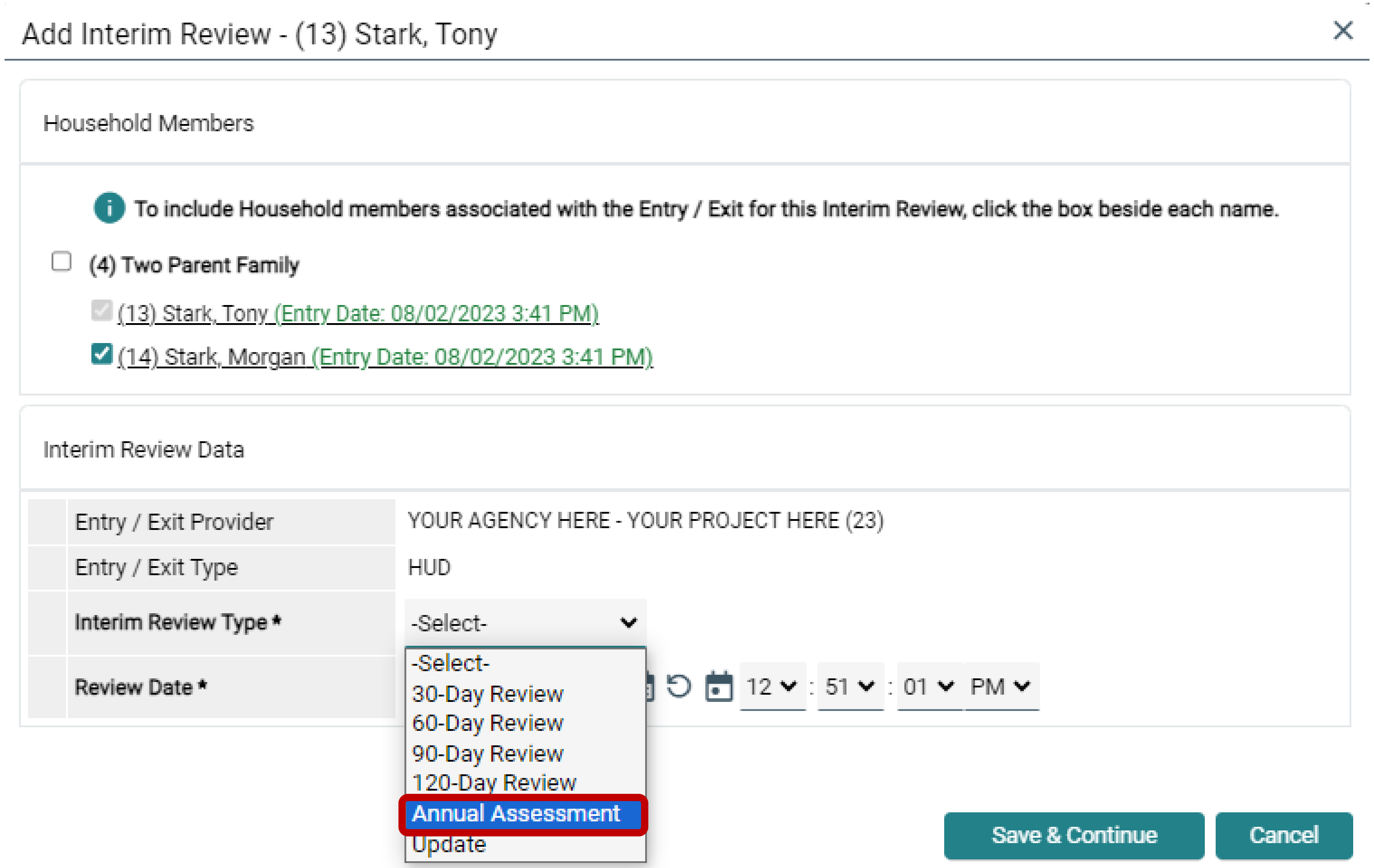
- Add HMID when client ***physically* moves into their housing unit**
  - Repeat this step for each household member
- Add **through an Interim**
  - HMID should be blank on entry assessment
- It is possible that intake and Housing Move-In Date are the same



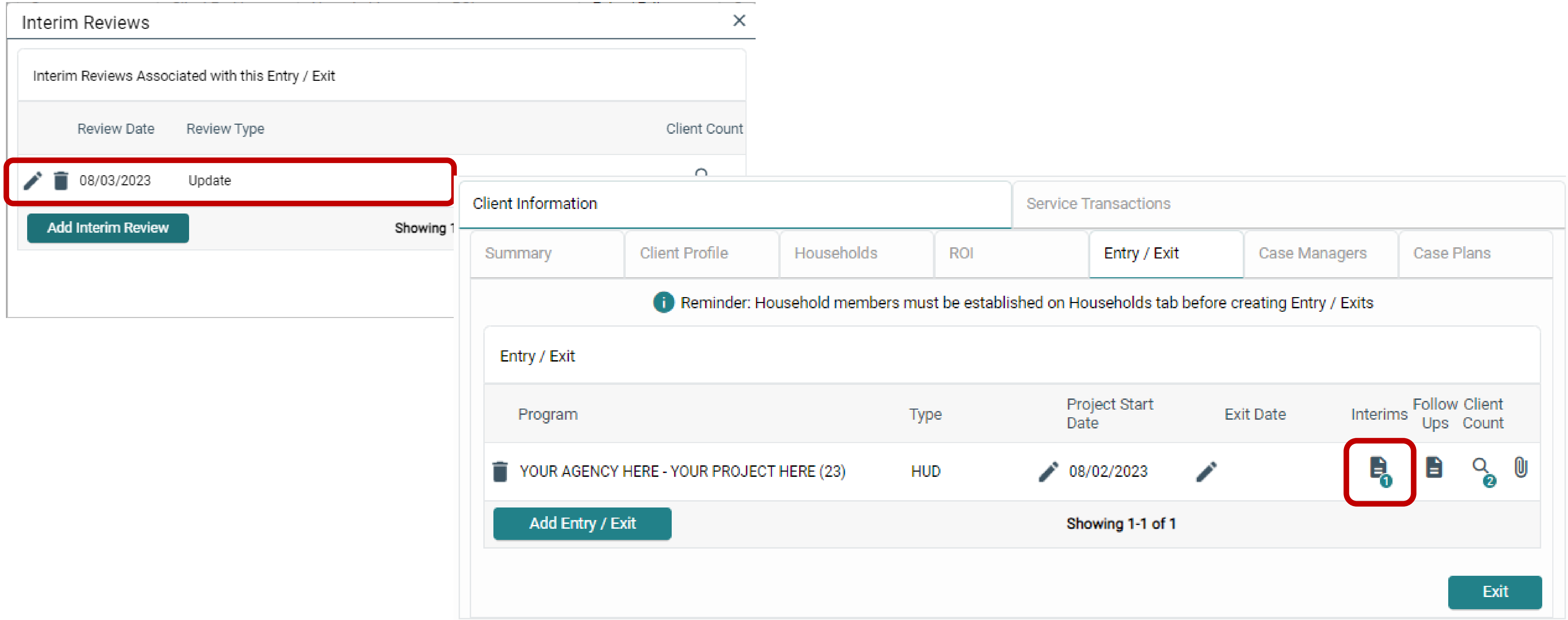
ADDING AN ANNUAL ASSESSMENT

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



WHAT A COMPLETED INTERIM LOOKS LIKE



PROJECT EXIT

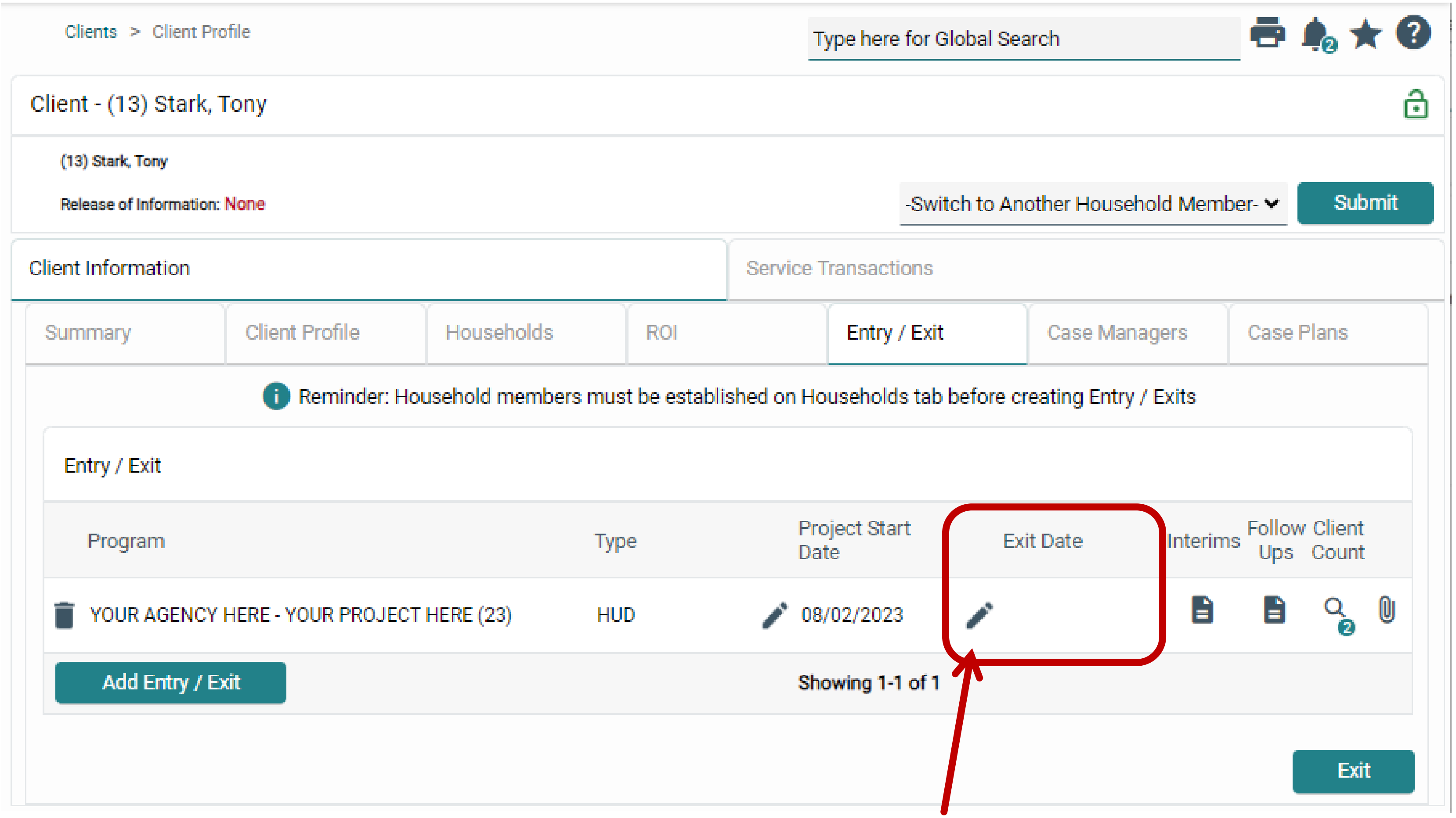
HOW TO ADD A PROJECT EXIT

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

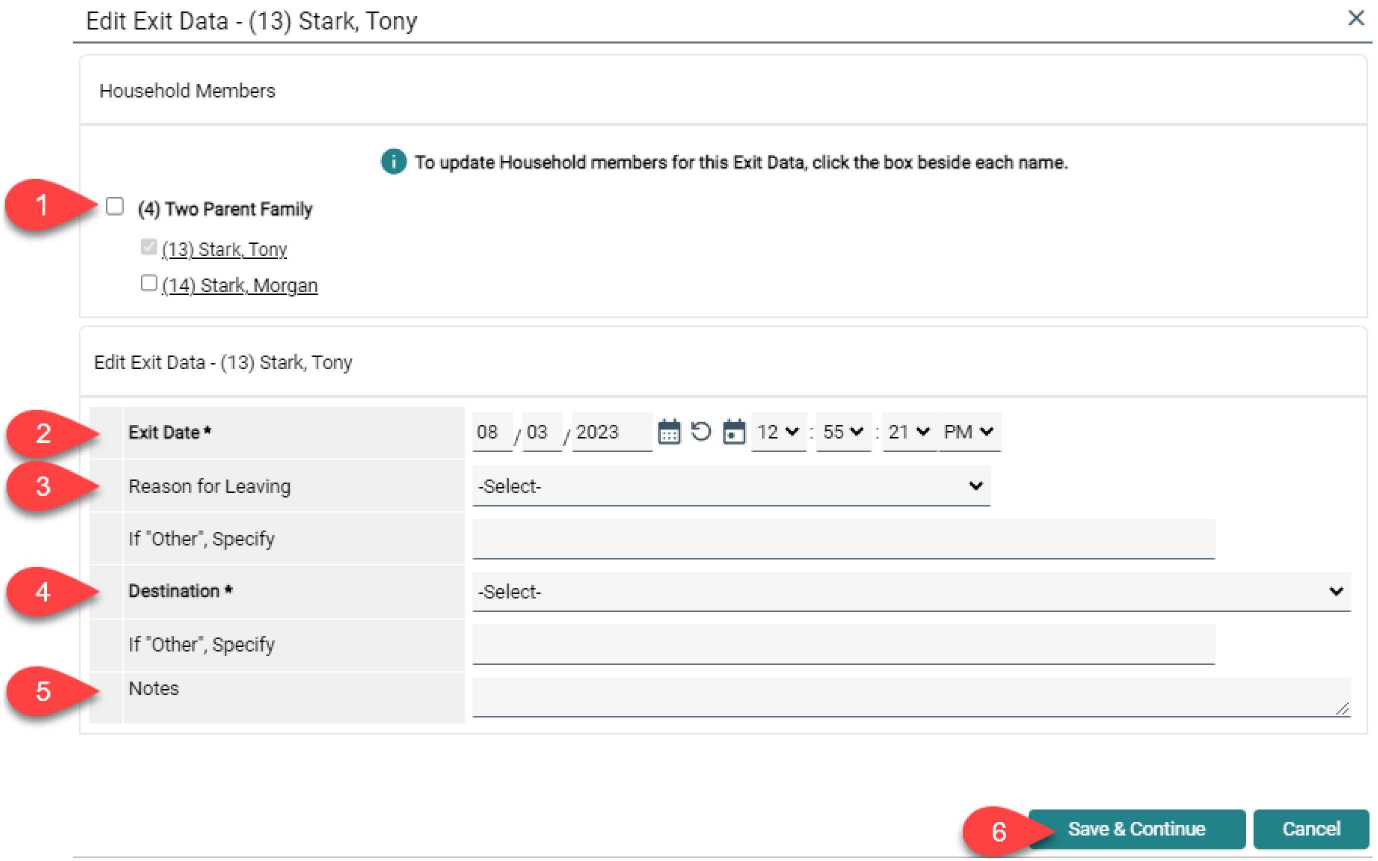
Where to locate it:

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



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**



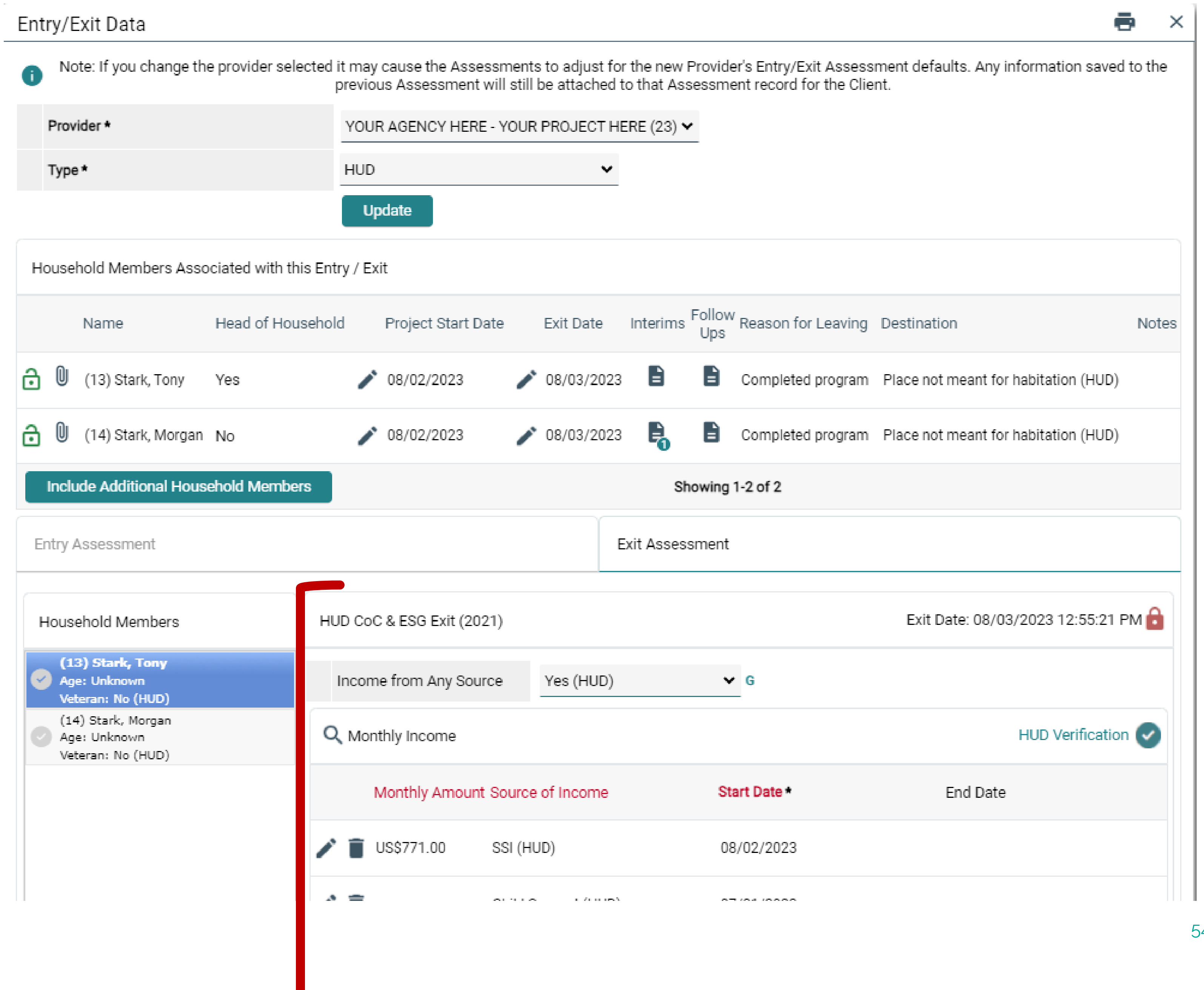
UPDATING THE EXIT ASSESSMENT

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

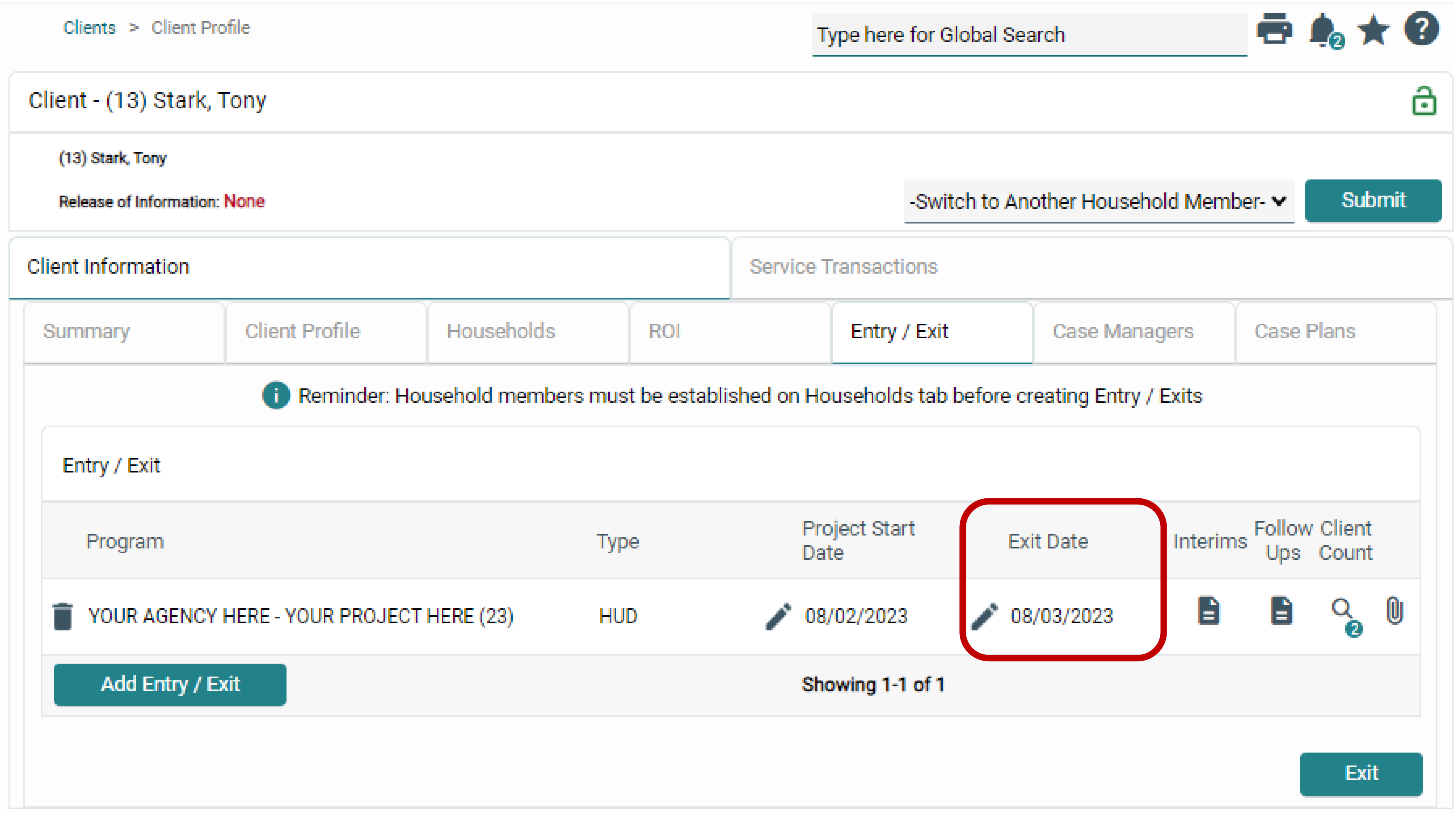
- Income
- Non-cash benefits
- Insurance
- Disabling Condition

Some additional information is requested of certain program types

Save & Exit when finished



WHAT A COMPLETED PROJECT EXIT LOOKS LIKE



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.