



Rhode Island Coalition
for the Homeless

HMIS Group Training

RI-HMIS Training for Families

Rhode Island Coalition for the Homeless

September 19, 2018

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AGENDA

- ▶ Ice Breaker
- ▶ Updating Households
 - ▶ Adding a Family Member
 - ▶ ROI, Entry & Case Manager Assignment
- ▶ Case Plans and Service Transactions
 - ▶ Setting Basic Goals
 - ▶ Adding Notes
 - ▶ Adding Services
- ▶ Interim Update/Annual Assessment Overview
- ▶ Uploads
- ▶ Housing Document Checklist
- ▶ Discussion/Questions
- ▶ Group Training Evaluation

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Ice Breaker

- ▶ Pair up with someone else in the room.
- ▶ One person explains the picture to the other, the other draws.
- ▶ No peaking & No questions asked!
- ▶ Don't look at what the picture was until announced.
- ▶ Have fun!

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UPDATING HOUSEHOLDS

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Updating Households

Make sure all reflected in the “Households Tab” is accurate for your families current situation.

- ▶ Make sure the **Family Type** is Correct.
- ▶ Make sure there is a **Head of Household**
- ▶ Make sure EVERY person has a **Relationship to the Head of Household**
- ▶ If not, click **Manage Household**, and fix it.

Client Information | Service Transactions

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

(780) Female Single Parent

| Name | Age | Head of Household | Relationship to Head of Household | Joined Household | Previous Associations | Household Count |
|--------|-----|-------------------|-----------------------------------|------------------|-----------------------|-----------------|
| (2681) | 53 | Yes | mother | 09/18/2018 | 0 | 1 |
| (2679) | 18 | No | daughter | 09/18/2018 | 0 | 1 |
| (2680) | 20 | No | daughter | 09/18/2018 | 0 | 1 |

Manage Household

Previous Households

Search Existing Households | Start New Household

Exit

Add a New Family Member to the Household

This can be done in 7 SIMPLE Steps! 😊

1. Manage the Household
2. Search for/Create a New Client in HMIS
3. Update the Relationship to the Head of Household
4. Update the Client Profile Information for the New Family Members
5. Add the New Family Member to the Pre-Existing ROI & Case Manager Assignment
6. Add the New Family Member to the Pre-Existing Entry
7. Add the New Family Member to the Bed List with their Family

Step1: Click “Manage Household”

Household Information - (780) Female Single Parent

Household Type: Female Single Parent

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

Client Count: 3

| Name | Age | Head of Household | Relationship to Head of Household | Joined Household * | Previous Associations | Household Count |
|-----------------|-----|-------------------------------------|-----------------------------------|--------------------|-----------------------|-----------------|
| (2681) mother | 53 | <input checked="" type="checkbox"/> | mother | 09 / 18 / 2018 | 0 | 1 |
| (2679) daughter | 18 | <input type="checkbox"/> | daughter | 09 / 18 / 2018 | 0 | 1 |
| (2680) daughter | 20 | <input type="checkbox"/> | daughter | 09 / 18 / 2018 | 0 | 1 |

Buttons: Save, Save & Exit, Exit

- ▶ On this screen, you can change the household type (red).
- ▶ You can change who is the head of household and the relationship to each member (blue) - only ONE person should be head of household.
- ▶ You can add/remove people from the household and also update some of their client profile information.

Step 2: Search For/Create a New Client in HMIS.

Household Members

| Name | Age | Head of Household | Relationship to Head of Household | Joined Household * | Previous Associations | Household Count |
|-----------------|-----|-------------------|-----------------------------------|--------------------|-----------------------|-----------------|
| (2681) mother | 53 | Yes | mother | 09/18/2018 | 0 | 1 |
| (2679) daughter | 18 | No | daughter | 09/18/2018 | 0 | 1 |
| (2680) daughter | 20 | No | daughter | 09/18/2018 | 0 | 1 |

Buttons: Add/Delete Household Members, Previous Household Members, Individual Client Assessment, Household Members, Client Record, Issue ID Card

Client Search

Please Search the System before adding a New Client.

Name: [Full Name Reported]

Social Security Number: [Full SSN Reported (HUD)]

Date of Birth: [Full (HUD)]

U.S. Military Veteran? [No (HUD)]

Exact Match []

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

Client Results

| ID | Name | Social Security Number | Date of Birth | Alias | Gender | Household Count |
|------|------------|------------------------|---------------|------------|--------|-----------------|
| 1230 | [Redacted] | [Redacted] | 10/14/1974 | [Redacted] | Male | 0 |

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Selected Clients

| ID | Name | Social Security Number | Date of Birth | Alias | Gender | Household Count |
|------|------------|------------------------|---------------|------------|------------|-----------------|
| 2682 | [Redacted] | [Redacted] | [Redacted] | [Redacted] | [Redacted] | 0 |

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Buttons: Continue, Cancel

- ▶ Click “Add Delete Household Members” (Pink)
- ▶ If this client was PREVIOUSLY in the household, they will appear under 'Previous Household Members.' (Blue)
- ▶ Search for the client by name and social, if a newborn baby without a social yet, that is okay - still search by name.
- ▶ If they are in the system, their name would appear on the bottom and you'd click their name to add them to the household.
- ▶ If they are NOT in the system, exit without saving, BACK DATE to the date they joined the family in shelter/housing & go back to this part to add the client to the household.
- ▶ NOTE: ALL PERSONS MUST BE ADDED TO THE SYSTEM FOR A DATE AFTER THEIR BIRTHDATE, NOT BEFORE. IF BORN/MOVED IN SAME DAY, PAY ATTENTION TO THE TIMES.
- ▶ When done adding people to the household, click 'Continue.'

Step 3: Update the Relationship to the Head of Household

Household Information - (780) Female Single Parent

Household Type*: Female Single Parent
Income: US\$0.00 monthly (US\$0.00 annual)
Client Count: 4

| Name | Age | Head of Household | Relationship to Head of Household | Joined Household* | Previous Associations | Household Count |
|--------|-----|-------------------|-----------------------------------|-------------------|-----------------------|-----------------|
| (2681) | 53 | Yes | mother | 09 / 18 / 2018 | 0 | 1 |
| (2679) | 18 | No | daughter | 09 / 18 / 2018 | 0 | 1 |
| (2680) | 20 | No | daughter | 09 / 18 / 2018 | 0 | 1 |
| (2682) | | No | -Select- | 09 / 18 / 2018 | 0 | 1 |

Individual Client Assessment

Household Members: (2681) mother, (2679) daughter, (2680) daughter, (2682) daughter

Client Record: Name, Name Data Quality, Alias, Social Security, SSN Data Quality, U.S. Military Veteran?, Age

Household Profile Assessment: No Household Profile Assessment is specified for this Provider

- ▶ Double check the Household Type is still true. If not, change it.
- ▶ Ensure only ONE person is head of household.
- ▶ Make sure everyone's relationship to head of household is correct.
- ▶ You are also able to check through each client record here (only the basic information) to start filling in anything that may be missing. (Blue)
- ▶ When complete, click Save and Exit.

Step 4: Update the Client Profile Information for ANY New Family Members

Client - (2682)

Release of Information: None

Client Information: Summary, Client Profile, Households, RDI, Entry / Exit, Case Managers, Case Plans, Measurements, Assessments

Client Record: Name, Name Data Quality, Alias, Social Security, SSN Data Quality, U.S. Military Veteran?, Age

Client Demographics: Date of Birth, Date of Birth Type, Gender, Primary Race, Secondary Race, Ethnicity

Photo: [Client Photo] Change Clear

- ▶ If you backdated to create the new client, stay in Back Date Mode.
- ▶ Go to Client Profile, add in all Demographic information. (Red)
- ▶ If client is an adult over 18 and consents, add photo.
- ▶ When done, exit backdate mode (if you were in it) and go back to the head of households HMIS profile.

Step 5: Add New Family Member to Release of Information – FOLLOW SAME STEPS FOR CASE MANAGEMENT ASSIGNMENT!

Client - (2681) [REDACTED]

Release of Information: Ends 09/16/2020

Client Information: Summary, Client Profile, Households, ROI, Entry / Exit, Case Managers, Case Plans, Measurements, Assessments

Release of Information: Provider, Permission, Start Date, End Date

Household Members: (780) Female Single Parent, (2681), (2679), (2680)

Release of Information Data: Provider, Release Granted, Start Date, End Date, Documentation, Witness

Include Additional Household Members

Since the head of household already signed an ROI, if the client is under 18, they are covered by that ROI. (ONLY IF PARENT/GUARDIAN OF CHILD)

- ▶ 1) Do not add a NEW ROI for the new addition to the family, instead, click on the pencil next to the pre-existing (valid) ROI. (Blue)
- ▶ 2) Click "Include Additional Household Members" (Pink)
- ▶ 3) Click on the new Family members name. (Green) Click continue.
- ▶ 4) Save Release of Information. :) Done!

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Step 6: Add the New Family Member to your Program Entry

Client - (2681) [REDACTED]

Release of Information: Ends 09/16/2020

Client Information: Summary, Client Profile, Households, ROI, Entry / Exit, Case Managers, Case Plans, Measurements, Assessments

Entry / Exit: Program, Type, Project Start Date, Exit Date, Interims

Household Members: (780) Female Single Parent, (2681), (2679), (2680)

Edit Project Start Data - (2681) Jones, Melissa Jennifer

Provider: Crossroads Rhode Island (Case Management) (1335)

Type: HUD

Project Start Date: 09 / 16 / 2018

Do not Change yet!

Include Additional Household Members

Go to the Head of Households Entry/Exit Tab. Identify your programs entry.

- 1) Click on the pencil next to your entry. (Blue)
- 2) Click on "Include Additional Household Members" (Pink)
- 3) Select the new family member, and click continue. (Green)
- 4) DO NOT CHANGE THE ENTRY DATE AT THIS POINT, EVEN THOUGH THE NEW CLIENT IS ENTERING AT A LATER DATE. (RED)

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Step 6a: Now you'll change the entry date for the new client ONLY.

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

Provider * [Redacted] Type * HUD Update

Household Members Associated with this Entry / Exit

| Name | Head of Household | Project Start Date | Exit Date | Interims | Follow Ups | Reason for Leaving | Destination | Notes |
|--------|-------------------|--------------------|-----------|----------|------------|--------------------|-------------|-------|
| (2681) | Yes | 09/16/2018 | | | | | | |
| (2679) | No | 09/16/2018 | | | | | | |
| (2680) | No | 09/16/2018 | | | | | | |
| (2682) | No | 09/16/2018 | | | | | | |

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Include Additional Household Members

Entry Assessment

Household Members

HUD CoC & ESG Entry All Other Projects (2017)

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

(780) Female Single Parent

(2681) [Redacted] Entry Date: 09/16/2018 12:00 AM

(2679) [Redacted] Entry Date: 09/16/2018 12:00 AM

(2680) [Redacted] Entry Date: 09/16/2018 12:00 AM

(2682) [Redacted] Entry Date: 09/16/2018 12:00 AM

Include Additional Household Members

Edit Project Start Data - (2682) Jones, Stephanie Pamela

Provider [Redacted] Type HUD

Project Start Date * 09 / 18 / 2018 12:00:00 AM

Save & Continue Cancel

The Entry will open with all family members.

1) Click on the pencil to the right of your clients name. (Blue)

2) UNCHECK everyone else. (Pink)

3) Only your client has their name 'checked off', then change the date to THEIR entry date. (Green)

4) Click Save and Continue.

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Step 6b: Now you MUST Update the New Family Members ENTRY Information

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

Provider * [Redacted] Type * HUD Update

Household Members Associated with this Entry / Exit

| Name | Head of Household | Project Start Date | Exit Date | Interims | Follow Ups | Reason for Leaving | Destination | Notes |
|--------|-------------------|--------------------|-----------|----------|------------|--------------------|-------------|-------|
| (2681) | Yes | 09/16/2018 | | | | | | |
| (2679) | No | 09/16/2018 | | | | | | |
| (2680) | No | 09/16/2018 | | | | | | |
| (2682) | No | 09/16/2018 | | | | | | |

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Include Additional Household Members

Entry Assessment

Household Members

HUD CoC & ESG Entry All Other Projects (2017)

Entry Date: 09/18/2018 12:00:00 AM

Date of Birth 09 / 01 / 2017

Date of Birth Type Full DOB Reported (HUD)

Primary Race American Indian or Alaska Native (HUD)

Secondary Race American Indian or Alaska Native (HUD)

Ethnicity Hispanic/Latino (HUD)

Gender Female

Does the client have a disabling condition? -Select-

Relationship to Head of Household -Select-

Client Location -Select-

Residence Prior to Project Entry -Select-

Length of Stay in Previous Place -Select-

Total Monthly Income -Select-

Income from Any Source -Select-

Monthly Income HUD Verification

Start Date * Source of Income Monthly Amount Receiving Income Source? End Date

Add View Gross Income

Non-Cash Benefits from any source -Select-

Non-Cash Benefits HUD Verification

Realize that the Entry Date Only changed for the new client, this is good.

Answer all questions.

If family member was just born, their residence prior is the same as their mothers.

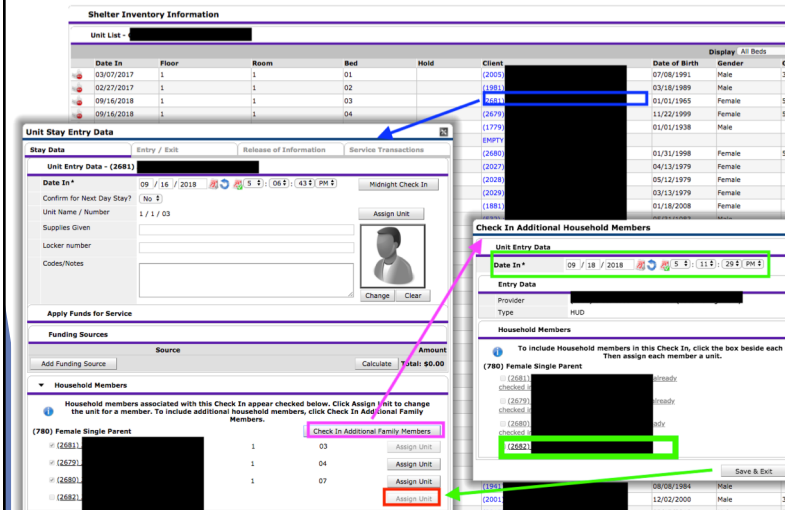
If family member was staying elsewhere and just joined the family, answer it as it pertains to the actual situation.

Click "Save and Continue"

You've successfully added them to your Entry!

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Step 7: If your family is on a bed list, you must include this family member with their 'stay.'



Shelter Inventory Information

| Unit List | Date In | Floor | Room | Bed | Hold | Client | Date of Birth | Gender | GP |
|-----------|------------|-------|------|-----|------|--------|---------------|--------|----|
| | 03/07/2017 | 1 | 1 | 01 | | (2005) | 07/08/1991 | Male | 36 |
| | 02/27/2017 | 1 | 1 | 02 | | (189) | 03/18/1989 | Male | |
| | 09/16/2018 | 1 | 1 | 03 | | (2679) | 03/01/1965 | Female | 50 |
| | 09/16/2018 | 1 | 1 | 04 | | (1778) | 11/22/1999 | Female | 50 |
| | | | | | | (1881) | 01/01/1938 | Male | |
| | | | | | | (2680) | 01/31/1998 | Female | 50 |
| | | | | | | (2027) | 04/13/1979 | Female | |
| | | | | | | (2030) | 09/12/1979 | Female | |
| | | | | | | (2029) | 03/13/1979 | Female | |
| | | | | | | (1881) | 01/18/2008 | Female | |

Unit Stay Entry Data

Stay Date: 09 / 18 / 2018 5:06 PM

Unit Entry Data - (2681)

Date In: 09 / 18 / 2018 5:11 PM

Confirm for Next Day Stay? No

Unit Name / Number: 1 / 1 / 03

Supplies Given: []

Locker number: []

Codes/Notes: []

Assign Unit: []

Change: [] Clear: []

Check In Additional Household Members

Unit Entry Data

Date In: 09 / 18 / 2018 5:11 PM

Entry Data

Provider: HUD

Type: HUD

Household Members

To include Household members in this Check In, click the box beside each member. Then assign each member a unit.

(780) Female Single Parent

(2681) [] Ready

(2679) [] Ready

(2680) [] Ready

(2682) [] Ready

Assign Unit: []

Assign Unit: []

Assign Unit: []

Assign Unit: []

Save & Exit: []

1) Go to ShelterPoint and View the Bed List.

2) Find the Head of Household, click on their blue name. (Blue)

3) Click "Check In Additional Family members" (Pink)

4) Change the Date In to the SAME DATE AS ENTRY/Move-In. (Green)

5) Make Sure only the New Family member is checked off. Click Save and Exit. (Green)

6) "Assign Unit" to put the client in the right bed. (Red)

7) Save and Exit and you're done!

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Case Plans and Service Transactions

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Set Minimal Goals for YOUR Program - Track ALL Case Notes and Services in Your Goals!

Goals should be "In Progress" until Abandoned/Closed.

Goal - (2681)

Household Members

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

- (780) Female Single Parent
 - (2681)
 - (2679)
 - (2680)

Include Additional Household Members

Provider* [Search] [My Provider] [Clear]

Case Manager [Search] [My Provider] [Clear]

Date Goal was Set 09/16/2018

Classification* Housing

Type* Housing

Goal Description Find Housing

Target Date []/[]/[]

Overall Status In Progress

If Closed, Outcome: -Select-

If Partially Complete, Percent Complete: -Select-

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

Follow Up User Rhode Island Coalition for the Homeless (1306) [Search] [My Provider] [Clear]

Follow Up Made -Select-

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

Outcome at Follow Up -Select-

Each Case Note should have a Service Transaction to Accompany it.

Reminder: Services are CLOSED AND FULLY MET ☺

Case Notes

| Provider | Case Manager | Note Date | Note |
|----------|--------------|------------|--|
| [Icon] | [Redacted] | 09/17/2018 | Met with family from x time to x time, MJJ's other daughter will be joining family in shelter tomorrow. will meet then. SC |
| [Icon] | [Redacted] | 09/16/2018 | Met with family from x time to x time, did x, y and z... looking for housing. SC |

Add Case Note

Showing 1-2 of 2

Action Steps Planned

| Action Step | Target Date | Status | Outcome |
|-------------|-------------|--------|---------|
| No matches. | | | |

Add Action Step

Service Items for this Goal

| Date Set | Created By | Need Type | Need Status | Outcome of Need |
|------------|------------|-----------|-------------|-----------------|
| 09/17/2018 | [Redacted] | | Closed | Fully Met |
| 09/16/2018 | [Redacted] | | Closed | Fully Met |

Add Service Add Multiple Services

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Print Save Goal Save & Exit Exit

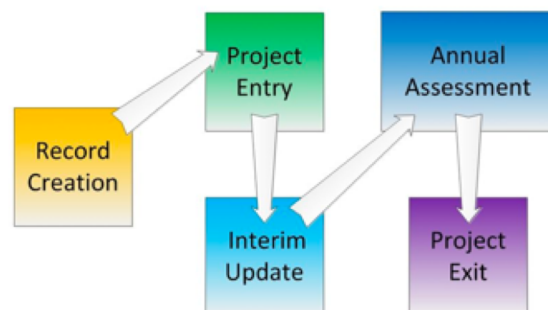
INTERIM UPDATES AND ANNUAL ASSESSMENTS

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Interim Updates & Annual Assessments

- ▶ **Interim Update:**
An update of any client data after the Project Start Date and *before* a client Exits. The information that should be updated includes income, non-cash benefits, health insurance, client contacts, date of engagement and/or housing move-in date.
- ▶ **Annual Assessment:**
A **required** update of any client data after 365 days following the Project Start Date, *before* a client Exits. This can be done 30-days prior or 30-days following the Project Start Date. The information that should be updated includes income, non-cash benefits, health insurance, client contacts, date of engagement and/or housing move-in date.

The Five HUD Data Collection Points



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Where do you do the interim updates and/or annual assessments?

- After Entering your client into a project, you will only go back into the Entry Assessment to correct data that is wrong or to enter data that is missing.

Client Information | Service Transactions

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

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

| Program | Type | Entry Date | Exit Date | Interims | Follow Ups | Client Count |
|---------|------|------------|-----------|----------|------------|--------------|
| | HUD | 12/09/2015 | | | | |

Add Entry / Exit

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Updates
go here!

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UPLOADING DOCUMENTS INTO HMIS

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Upload Documents in the Client Profile Tab, at the Bottom “File Attachments”

Client - (2681) [REDACTED]

Release of Information: None [Switch to Another Household Member:] Submit

Client Information Summary Client Profile Households RO1 Entry / Exit Case Managers Case Plans Measurements Assessments

Client Record [Issue ID Card]

Name [REDACTED]
 Name Data Quality [REDACTED]
 Alias [REDACTED]
 Social Security [REDACTED]
 SSN Data Quality [REDACTED]
 U.S. Military Veteran? [REDACTED]
 Age [REDACTED]

Client Demographics

Date of Birth [REDACTED]
 Date of Birth Type [REDACTED]
 Gender [REDACTED]
 Primary Race [REDACTED]
 Secondary Race [REDACTED]
 Ethnicity [REDACTED]

VI-SPDAT 2.0

VI-SPDAT v2.0

Start Date * PRE-SURVEY A. HISTORY OF HOUSING AND HOMELESSNESS B. RISKS C. SOCIALIZATION & DAILY FUNCTIONS D. WELLNESS GRAND TOTAL

Add Cancel

Client Notes

Provider Note Date Note Preview Full Note

Add New Client Note Print No matches.

File Attachments 23

Date Added Name Description Type Provider Added From

Add New File Attachment No matches.

HOUSING DOCUMENT CHECKLIST

Keep Track of the Documentation Needed in the Housing Document Checklist, Located in the “Assessments” Tab

The screenshot shows the 'Assessments' tab in a software interface. The 'Select an Assessment' dropdown menu is highlighted with a red circle, and a red arrow points to the 'Submit' button. The 'Housing Document Checklist' form is displayed below, with fields for Proof of Income, Social Security Card, Birth Certificate, Photo ID, and Disability Confirmation. Each field has a dropdown menu and a 'G' icon.

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Discussion/ Specific Questions?

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Group Training Evaluation & Certificates

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Contact the HMIS Team anytime with any questions or concerns!

- ▶ Shalissa Coutoulakis (401)721-5685 ext. 27 shalissa@rihomeless.org
- ▶ Bob Maurice (401)721-5685 ext. 26 bob@rihomeless.org
- ▶ Don Larsen (401)721-5685 ext.25 don@rihomeless.org



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