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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- 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

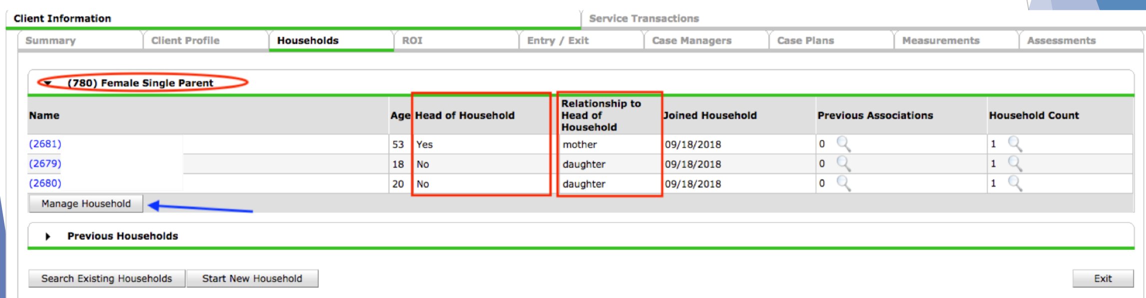
- Pair up with someone else in the room.
- One person explains the picture to the other, the other draws.
- No peaking & No questions asked!
- Don’t look at what the picture was until announced.
- **Have fun!**

UPDATING HOUSEHOLDS

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

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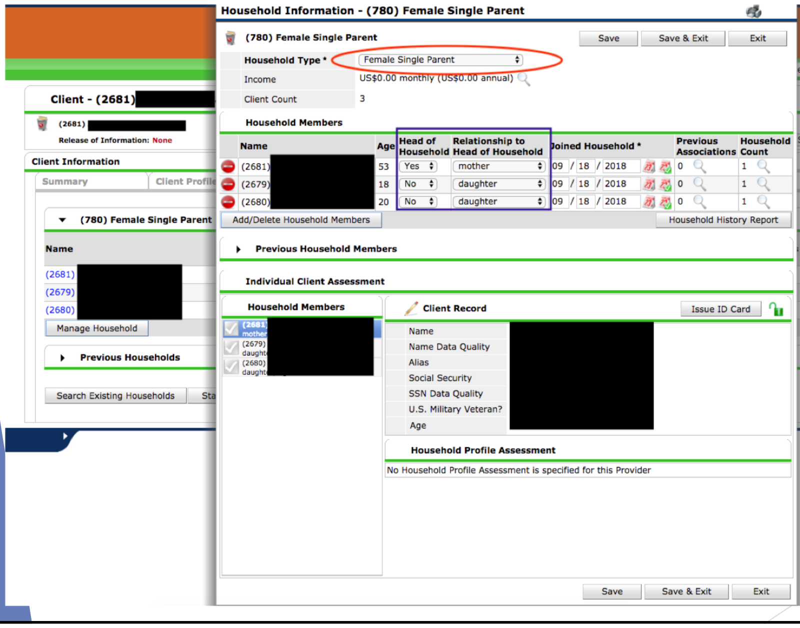
Step1: Click "Manage Household"



- 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.

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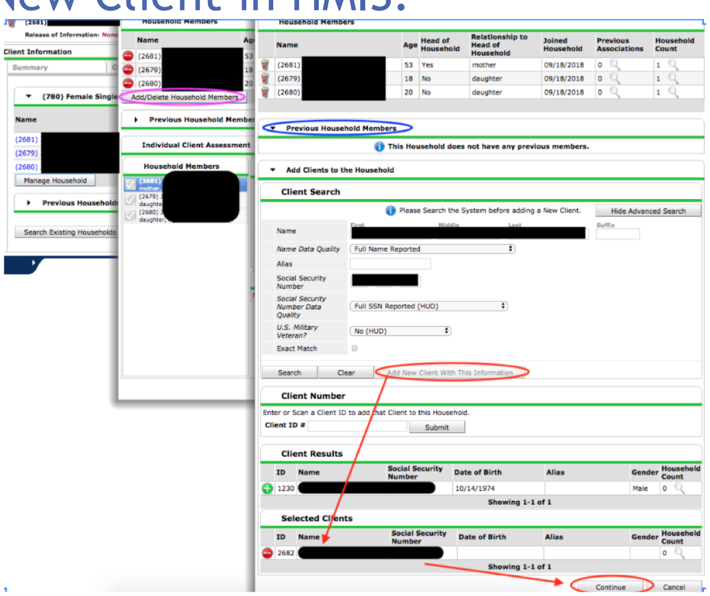
Step 2: Search For/Create a New Client in HMIS.



- 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.'

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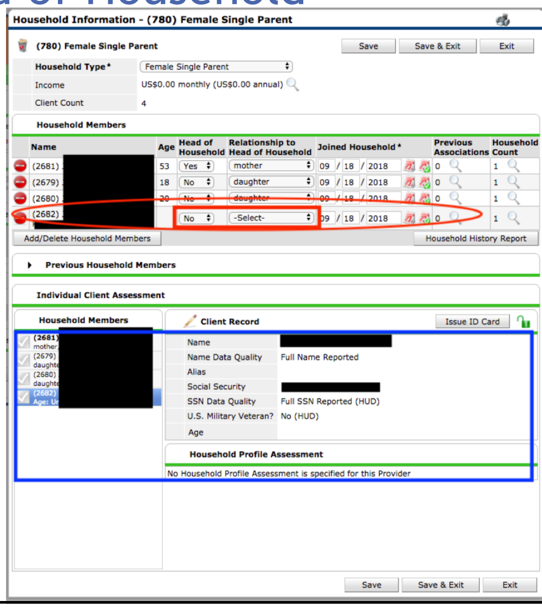
Step 3: Update the Relationship to the Head of Household



- 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.

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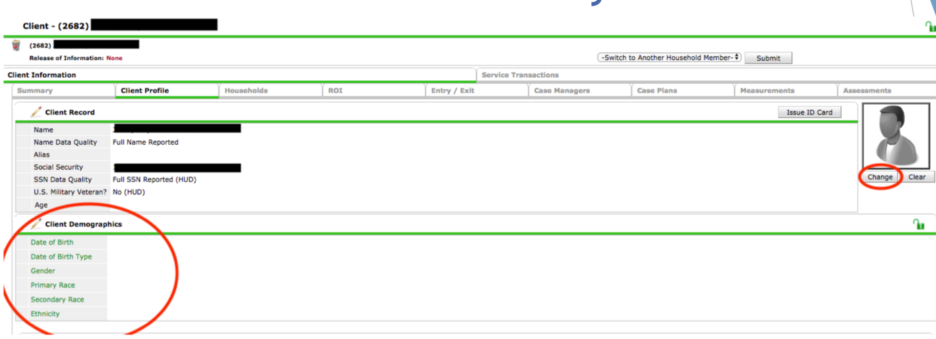
Step 4: Update the Client Profile Information for ANY New Family Members



- 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.

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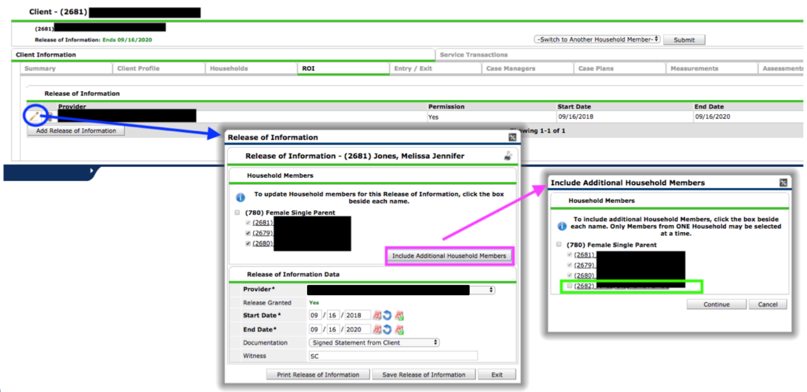
Step 5: Add New Family Member to Release of Information – FOLLOW SAME STEPS FOR CASE MANAGEMENT ASSIGNMENT!



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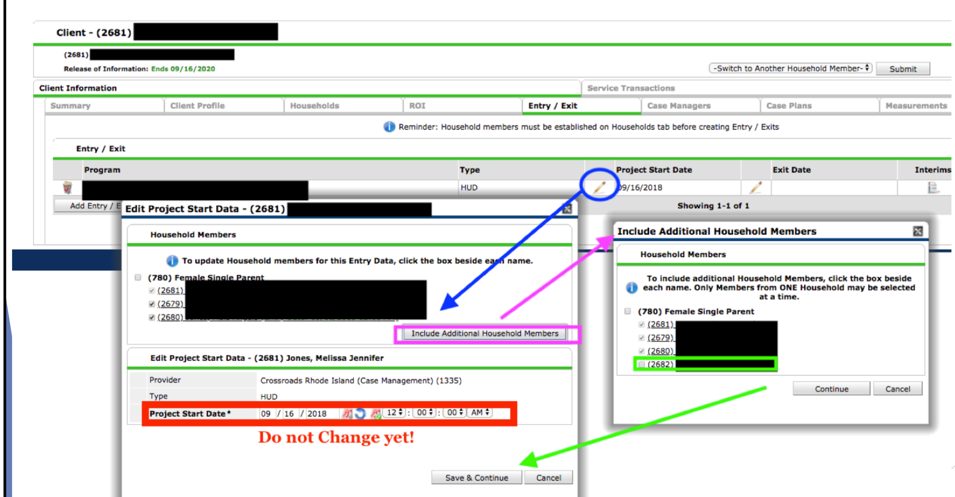
Step 6: Add the New Family Member to your Program Entry



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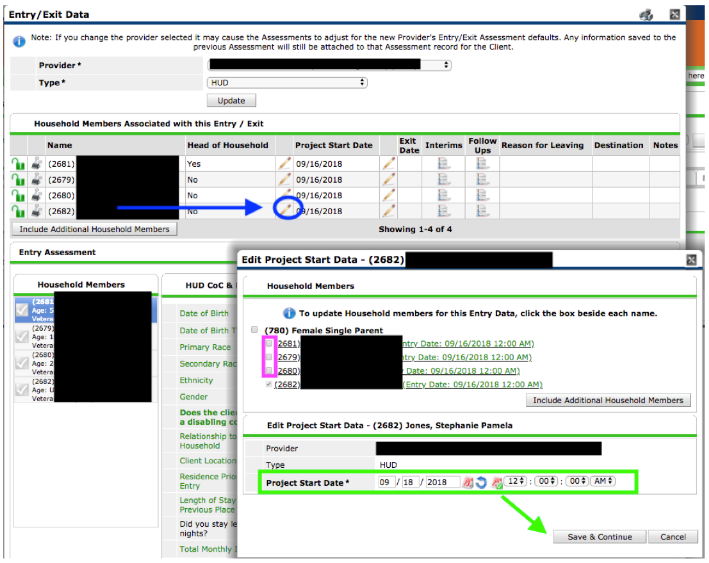
Step 6a: Now you'll change the entry date for the new client ONLY.



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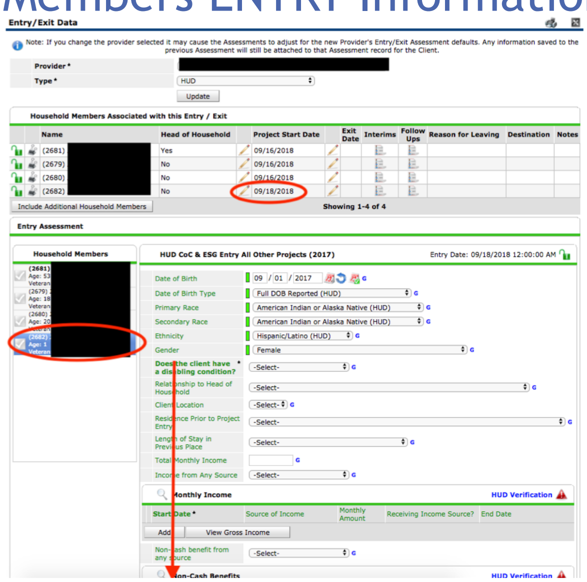
Step 6b: Now you MUST Update the New Family Members ENTRY Information



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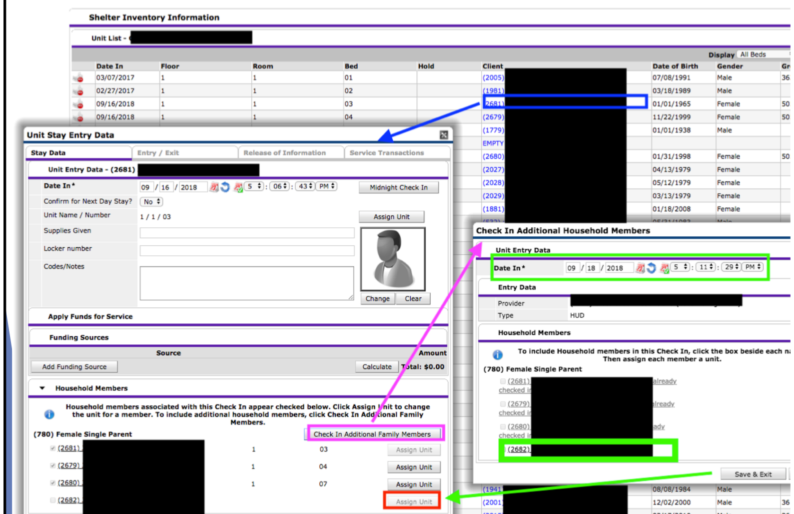
Step 7: If your family is on a bed list, you must include this family member with their ‘stay.’



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)

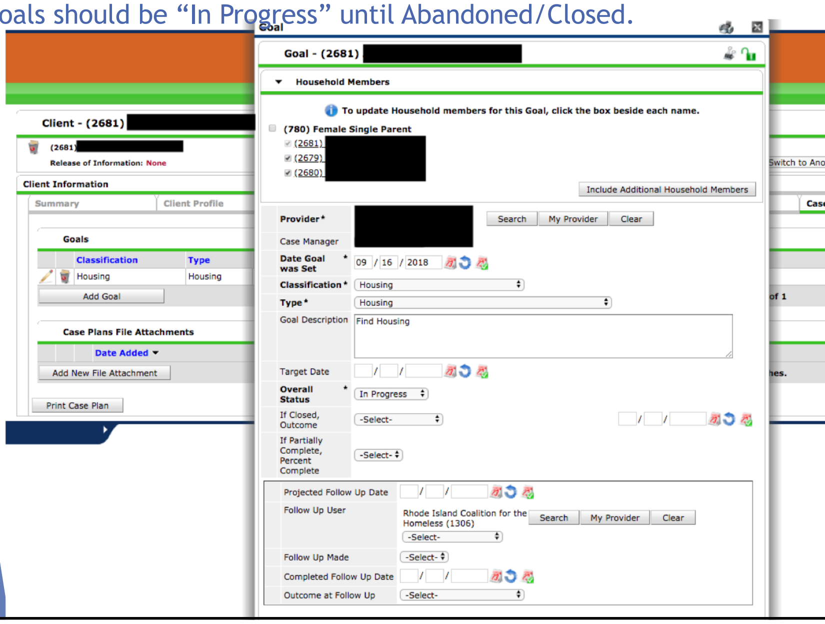
6) "Assign Unit" to put the client in the right bed. (Red)

7) Save and Exit and you're done!

Case Plans and Service Transactions

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

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



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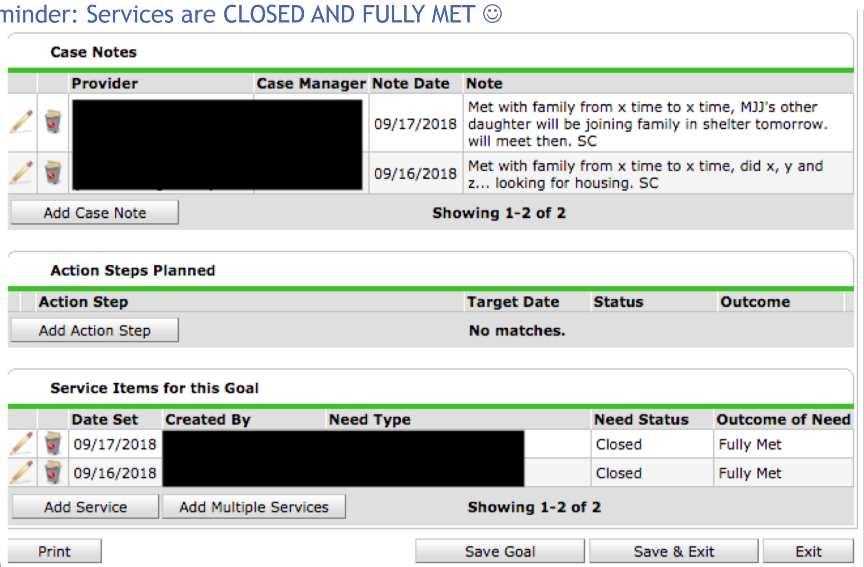
Each Case Note should have a Service Transaction to Accompany it.

Reminder: Services are CLOSED AND FULLY MET ☺



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INTERIM UPDATES AND ANNUAL ASSESSMENTS

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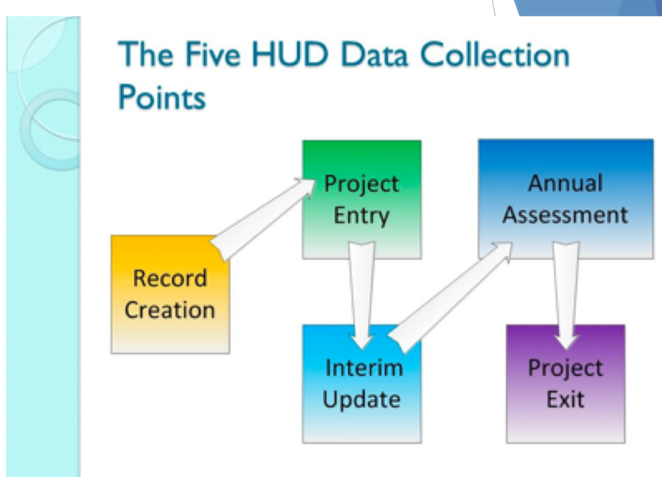
Interim Updates & Annual Assessments

- **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.



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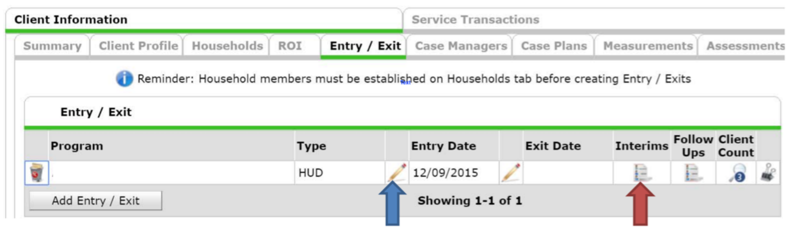
Where do you do the interim **updates and/or annual assessments?**

– 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.



Updates
go here!

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UPLOADING DOCUMENTS INTO HMIS

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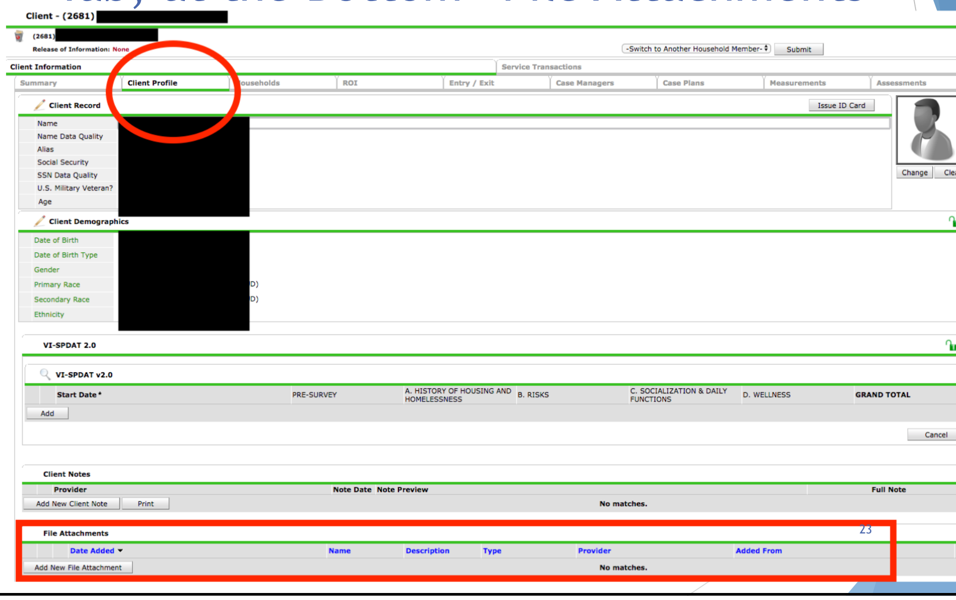
Upload Documents in the Client Profile Tab, at the Bottom "File Attachments"



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HOUSING DOCUMENT CHECKLIST

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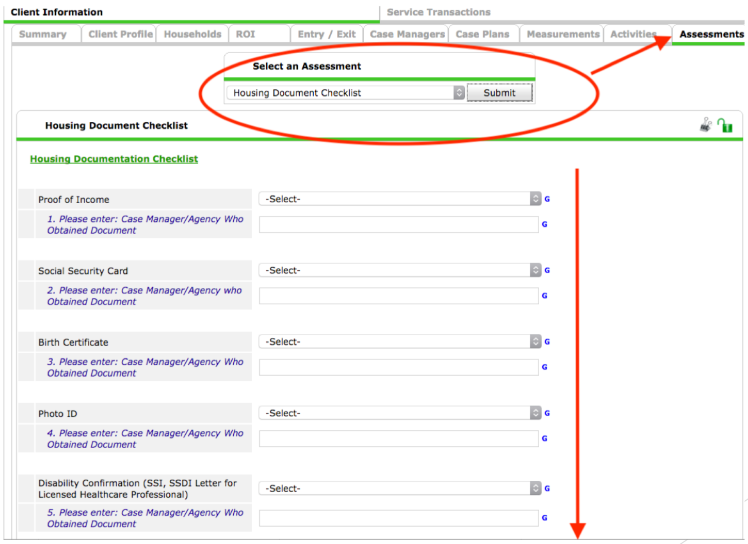
Keep Track of the Documentation Needed in the Housing Document Checklist, Located in the "Assessments" Tab



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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!

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- Bob Maurice (401)721-5685 ext. 26 bob@rihomeless.org
- Don Larsen (401)721-5685 ext.25 don@rihomelesss.org

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