

Coordinated Entry (CE) Data Entry Training Guide

Metro Homeless Impact Division

Updated June 2019

What is HMIS?

- HMIS stands for **Homeless Management Information System**. An HMIS is a web-based software application that collects and reports on client-level information for people who are served by projects intended to prevent and end homelessness.
- HMIS collects information about who your clients are, when you served them, what their circumstances are when they enter your project, whether they change, and what services you are providing.

Why Use HMIS?

- **Every Continuum of Care (CoC) is required to have a single HMIS in order to receive funding from the Dept. of Housing and Urban Development (HUD)**
- HMIS is used to measure project effectiveness, generate an unduplicated count of homeless persons for the CoC, and help understand the extent and nature of homelessness and patterns of service use.
- The more agencies that participate, the better we are able to provide services and demonstrate our community's effectiveness in ending and preventing homelessness!

How Data is Organized in HMIS

IMAGINING HMIS AS A NEIGHBORHOOD

- To get a better understanding of the way information is stored in HMIS, imagine HMIS as a neighborhood. All of the information collected by service providers in Nashville lives in this neighborhood. Different streets in the neighborhood represent different agencies – for example, let's say the neighborhood has Safe Haven St., Centerstone SSVF Ave., Nashville Cares Way, Park Center Blvd. On each street there are many houses, representing the different programs that each agency (street) contains – for example, on Centerstone SSVF Ave. there's a house called *Homelessness Prevention*, as well as a house called *Rapid Rehousing* since they run both of those programs. Every time you, the user, enter information into HMIS, you will always be entering that information into a specific *house* on a particular *street*.
- A client in Nashville may receive services at any "house" on any "street" over the course of time. For example, perhaps they were a part of Centerstone SSVF's Rapid Rehousing program a year ago, but now they're receiving services from the Salvation Army. The Salvation Army HMIS user will be entering that client's information into a different "house" than the SSVF HMIS user had entered into previously. ***Note: Since the Nashville/Davidson County does not engage in system-wide data sharing at this point, HMIS users at one agency cannot view the details of services a client has received at any agency other than their own. You can only view the services and entries and exits that your agency has provided.** You can view information entered in other houses on your street, but not on other streets in the neighborhood.
- Think of Coordinated Entry as the **gate** to the neighborhood. By utilizing Coordinated Entry, we can prioritize referrals and get people in our community into housing more quickly and efficiently.

Privacy and Security Reminders

- Always log out of HMIS when you leave your desk.
- Choose a strong password and do not share it or write it down.
- Review the release of information form with your clients thoroughly.

Important Resources

- HMIS URL (save as a bookmark!):
<https://sp5.servicetp.com/MHIDNashville>
- HMIS Help Desk: HMISHelp@nashville.gov
- HMIS Administrator: Rachel O'Connor Cook
(Rachel.cook@nashville.gov)
- Coordinated Entry Manager: Jessica Ivey
(Jessica.ivey@nashville.gov)

Before You Start...



In order to enter a client in HMIS, you **must** have a signed **Release of Information (ROI)** on file!!

Homepage



Metropolitan Social Services

Centerstone: SSO: Critical Time Intervention

June 10, 2019

Your agency's name

Your username

William Williams
System Admin II

Mode: Shadow mhdison
Enter Data As
Back Date

Home > Home Page Dashboard

Type here for Global Search

- Last Viewed
- Favorites
- Home
- ClientPoint
- ResourcePoint
- Reports
- Admin
- Logout

ClientPoint

Agency News (0)

Enter Data As (EDA)

Back Date

05/07/2019	Forgot Password Link
03/14/2019	HMIS Data Days
02/28/2019	HMIS Help Desk Contact Information
09/30/2016	2016 HMIS Standards and CHANGES-Link to Dropbox HERE!
12/14/2015	Veteran Service Providers!
10/07/2015	Newest Questions around Homelessness!

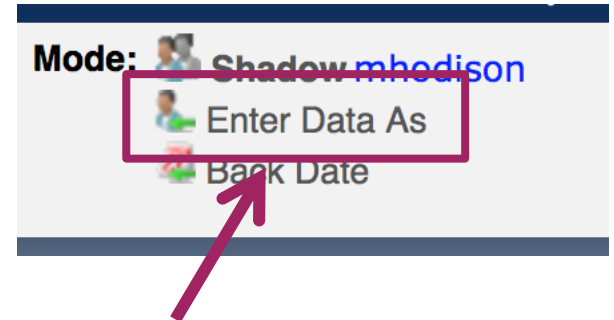
Client ID	Type	Date	Time Remaining
[Empty table body]			

Customize Home Page Dashboard

News!

Always the first step: EDA Mode

1. After you log in, first find and click **“Enter Data As”** (EDA) at the top right of the page. The provider you select here is where your data will be stored – you are “Entering As” that provider and associating the client with it.



Enter Data As (EDA)

2. Select the **program** where the client you’re entering belongs by clicking the **green circle** with the plus sign.

Enter Data As Provider Search

Provider Search

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

Search

Provider Number

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

Provider ID #

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
			Coordinated Entry: Nashville-Davidson County (CE) (411)		Level 2	Unknown	Nashville, TN 37203	06/03/2019																			
			Metro Critical Time Intervention (CTI) Grant (545)		Level 3	Unknown	Nashville, TN 37215	06/10/2019																			

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EDA Tips

- Selecting the correct EDA mode is an important step you need to take every single time you enter data for a client!
 - Especially if you're entering multiple clients in a row, you should make frequent checks to that top-right section of the screen to ensure that you're in the EDA mode that you meant to be in.
 - If you realize you have entered a client's information under the wrong EDA mode, you will need to contact the HMIS Help Desk to delete the data. Then you'll have to start over, using the correct EDA mode – so pay close attention!

ClientPoint – Searching for a Client

- Before entering a new client, you are required to first **search the system** to see if that client already has a record in HMIS (in order to avoid duplication).
- Enter the client's first & last name and click "Search."

ClientPoint > Client Search

Client Search

Please Search the System

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

Search Clear Add New Client With This Information

Note: If you do not find a match using the client's name, add the client's SSN and click "Search" again.

ClientPoint – Searching for a Client

If the client has a record in the system, their name will appear under “Client Results.” If they are a match based on name, SSN, and DOB, select the pencil to edit the client record.

Client Search

Please Search the System before adding a New Client.


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

Client Number

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

Client ID #

Client Results

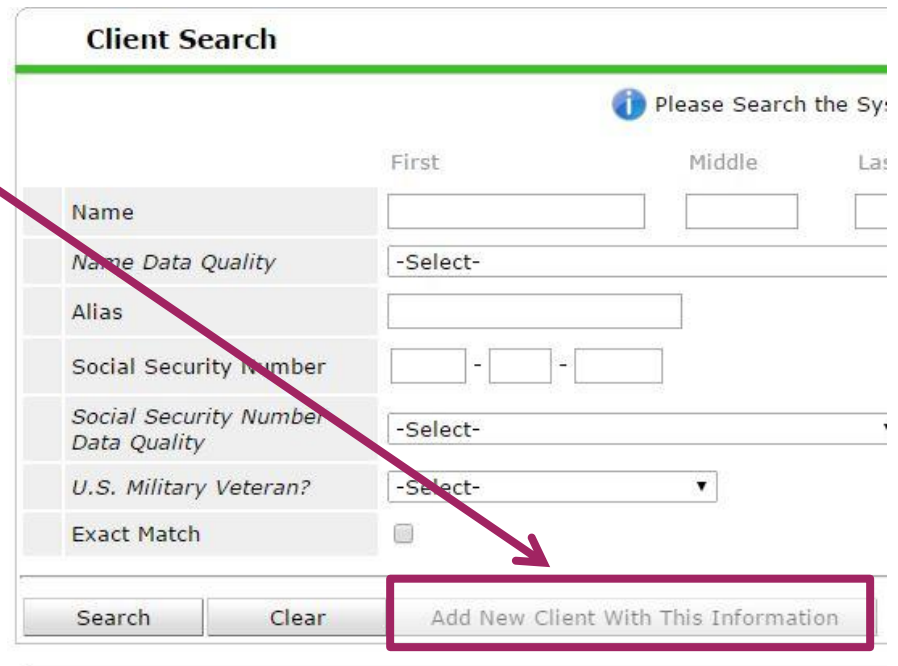
ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
 26770	Test, John	***-**-0000	02/18/1959		Male	<input type="checkbox"/>	0

Showing 1-1 of 1

Tip: If you already know the client's ID #, you can type it in to the Client ID # box and click "Submit." This will take you right to their record.

ClientPoint – Adding a New Client

- The system will not allow you to add a new client until you have at least done a basic search by name.
- If no client exists after you have tried searching their name and SSN, you may add them as a new client.



The screenshot shows a web form titled "Client Search". At the top right, there is a blue information icon and the text "Please Search the Sy:". Below this, there are three input fields for "First", "Middle", and "Last" names. The form contains several rows of search criteria:

Name	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name Data Quality	-Select-		
Alias	<input type="text"/>		
Social Security Number	<input type="text"/>	-	<input type="text"/>
Social Security Number Data Quality	-Select-		
U.S. Military Veteran?	-Select- ▼		
Exact Match	<input type="checkbox"/>		

At the bottom of the form, there are three buttons: "Search", "Clear", and "Add New Client With This Information". A red arrow points from the text in the first bullet point to the "Add New Client With This Information" button, which is highlighted with a red rectangular box.

ClientPoint – Adding a New Client

- To add a new client, enter all client information (*First Name, Last Name, Name Data Quality, SSN, SSN Data Quality, and US Military Veteran?*) and click **"Add New Client With This Information."**

The screenshot shows the 'Add New Client Information' form with the following fields and values:

	First	Middle	Last	Suffix
Name	Patty		Test	
Name Data Quality	Full Name Reported			
Alias				
Social Security Number	453	- 87	- 7896	
Social Security Number Data Quality	Full SSN Reported (HUD)			
U.S. Military Veteran?	No (HUD)			
Exact Match	<input type="checkbox"/>			

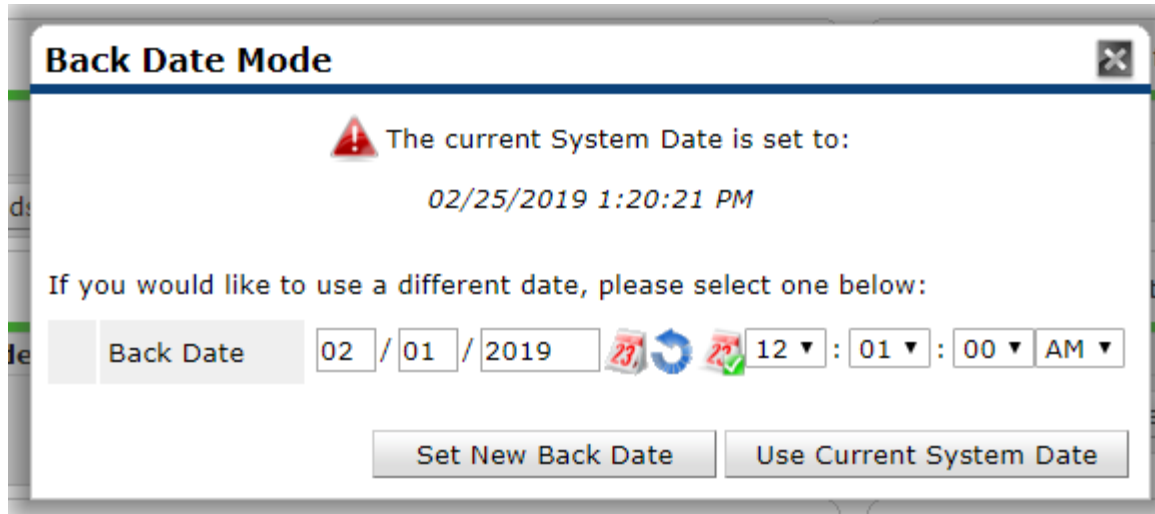
Annotations and callouts:

- A box at the top right says "Follow proper capitalization rules!" with arrows pointing to the 'Patty' and 'Test' input fields.
- A box at the bottom right says "Full First & Last Name = 'Full Name Reported'" with an arrow pointing to the 'Name Data Quality' dropdown.
- A box at the bottom center says "Click **Ok.**" with an arrow pointing to the 'Ok' button in the modal dialog.

The modal dialog 'Add New Client Information' contains the text: "You are about to add a New Client to the system. Be sure to look through all the possible matches before continuing the process). Continue with Add New Client?" and buttons for 'Ok' and 'Cancel'.

Client Record – Back Date Mode

- After adding a client or selecting a client record to edit, you will see a “Back Date Mode” pop-up.



- **Back Date** = The date something occurred (for example: the date you provided a service, the date a resident completed an activity, the date you completed an annual update, etc.)

Client Record – Back Date Mode

Remember: **Always use Back Date Mode!**

The screenshot shows a dialog box titled "Back Date Mode" with a warning icon and the text: "The current System Date is set 02/25/2019 1:20:21 PM". Below this, it says "If you would like to use a different date, please select one below:". There are two main input areas: a date field labeled "Back Date" with the value "02 / 01 / 2019" and a time field with the value "12 : 01 : 00 AM". At the bottom, there are two buttons: "Set New Back Date" and "Use Current System Date".

Enter the desired date.

Leave time as is! (12:01:00 AM)

Click **Set New Back Date** to continue.

Client Information – Summary Tab

- You will land on the **Summary** tab, which gives you a snapshot of much of the information in the client's record.

Client - (46465) Test, Peter John


(46465) Test, Peter John
Release of Information: Ends 06/19/2020

The **Client ID#** can be used to quickly navigate back to the client's record in the future.

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

Added to the system 09/12/2018 10:20 AM

Name	Test, Peter John	Gender	Male
Date of Birth	01/01/1979 (Age 40)	Primary Race	American Indian or Alaska Native (HUD)
Social Security	000-00-0000	Secondary Race	Asian (HUD)
		U.S. Military Veteran?	Yes (HUD)



Outstanding Outgoing Referrals

Referral Date	Referred To Provider	Need Type
No matches.		

Households

ID	Type	Head of Household	Relationship
7172	Couple With No Children		
	*Test, Peter John	Yes	Self
	Test, Rachel	No	Wife

Release of Information

Provider	Permission	Start Date	End Date
Coordinated Entry: Nashville-Davidson County (CE)	Yes	06/19/2019	06/19/2020
Metro Critical Time Intervention (CTI) Grant	Yes	02/01/2019	02/01/2020

Entry/Exits

Program	Type	Project Start Date	Exit Date
Coordinated Entry: Nashville-Davidson County (CE)	Standard	06/19/2019	
Metro Critical Time Intervention (CTI) Grant	Standard	02/01/2019	03/01/2019

Case Managers

Name	Provider	Phone Number
Monique Hodison	Metro Critical Time Intervention (CTI) Grant	

Client Profile Tab

- Client Demographics
- Client Photo
- File Attachments

Client Profile Tab

- Use the **Client Profile** tab to complete or correct demographic/identifying information, add a **photo** (if available), and **upload documents**.

Client - (46465) Test, Peter John

(46465) Test, Peter John
Release of Information: Ends 06/19/2020


-Switch to Another Household Member- Submit

Client Information Service Transactions

Summary Client Profile Households ROI Entry / Exit Case Managers

Added to the system 09/12/2018 10:20 AM

Name	Test, Peter John	Gender	Male
Date of Birth	01/01/1979 (Age 40)	Primary Race	American Indian or Alaska Native (HUD)
Social Security	000-00-0000	Secondary Race	Asian (HUD)
		U.S. Military Veteran?	Yes (HUD)




Note: Most users can only see the last 4 of SSN.
Contact your Agency Point of Contact if you believe the entire SSN is incorrect.

Client Profile Tab – Client Demographics

- Make sure **all** information is completed. Click the pencil to edit existing information.


Client Information | Service Transactions

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

Client Record Issue ID Card  Change Clear

Name	Test, Peter John
Name Data Quality	Full Na
Alias	
Social Security	000-00
SSN Data Quality	Full SS
U.S. Military Veteran?	Yes (H
Age	40

Client Demographics

 Client Demographics

Client's Date of Birth:	01 / 01 / 1979
Date of Birth Type *	Full DOB Reported (HUD)
Gender *	Male
Client's Primary Race: *	American Indian or Alaska Native (HUD)
Secondary Race (only if recorded)	Asian (HUD)
Client's Ethnicity: *	Non-Hispanic/Non-Latino (HUD)

Save Cancel

Client Demographics

Editing the Client Demographic Information could affect the Unique ID and the Client Search.

Client Demographics

If client reports **NO Secondary Race**, leave this field **BLANK**.

Client Profile Tab – File Attachments

- Use **File Attachments** (at the bottom of the Client Profile tab) to upload signed releases of information and housing-related documents.

Click **Add New File Attachment** to select a document from your computer.

The screenshot displays the 'File Attachments' section of a software interface. A table with columns 'Date Added', 'Name', 'Description', 'Type', 'Provider', and 'Added From' is visible. Below the table is a button labeled 'Add New File Attachment'. An 'Upload Attachment' dialog box is open, featuring a 'Name *' field with a 'Choose File' button, a 'Description' field, and 'Upload' and 'Cancel' buttons. A separate 'Incidents' section is partially visible below, with columns 'Start Date', 'End Date', and 'Inci', and an 'Add New Incident' button.

Files should be named using this naming convention:
"Last Name_First Name_Document Type"

Choose a File, then click **Upload**.

Client Profile Tab – Client Photo

- If you have obtained permission to upload a client photo, click "**Change**" to upload an image.

The screenshot shows the 'Client Profile' tab in a software interface. The 'Client Record' section contains the following data:

Name	Test, Peter John
Name Data Quality	Full Name Reported
Alias	
Social Security	000-00-0000
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	Yes (HUD)
Age	40

An 'Upload Client Image' dialog box is open, showing a 'Browse...' button, a 'Name*' field, a 'Description' field, and 'Upload' and 'Cancel' buttons. A 'Change' button is visible next to the current client photo.

Click **Choose File** to select an image from your computer. (Must be a JPEG or PNG file, *not* a PDF.)


Then click **Upload.**


Households Tab

- Create households with **multiple** members
- If you're working with a single individual, skip this step!

Households Tab

- If the client has other members in their household, relative or non-relative, click on the **Households** tab next.

Client - (46465) Test, Peter John 

 (46465) Test, Peter John
Release of Information: Ends 06/19/2020 -Switch to Another Household Member-

Client Information Service Transactions

Summary	Client Profile	Households	DOI	Entry / Exit	Case Managers
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Households Tab

- Check to see if the client is already in a household. If the household exists, select it.
 - **Note:** If a household already exists in HMIS, but the household makeup has changed, **create a new household** instead of adding/subtracting members from the previous household.
- If the client is not already in a household, select “Start New Household.” (See next slide)

Households Tab – New Household

Click “Start a New Household.”

1. Select the **Household Type.**

Household Type

Household Type * -Select-

Client Search

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

Name First Middle Last Search

Name June [] Test []

Name Data Quality -Select-

Alias []

Social Security Number [] - [] - []

Social Security Number Data Quality -Select-

U.S. Military Veteran? -Select-

Exact Match

Search Clear Add New Client With This Information

2. **Search** for a family member. If they already exist in the system, they will populate under “Client Results.” If they don’t already exist, select “**Add new Client with This Information.**”

Client Number

Enter or Scan a Client ID to add that Client to this Household.

Client ID # [] Submit

Client Results

ID	Name	Social Security Number	Date of Birth	Alias
+ 26770	Test, John	***-**-0000	01/01/1956	

Showing 1-1

3. Once you find/create the family member, click the green circle with the plus in order to **add** them to the household.

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias
26817	Test, PAtty			

Showing 1-1 of 1

4. **Repeat** for each household member.

Continue Cancel

Households Tab – New Household

Household Information - (7132) Two Parent Family

(7132) Two Parent Family Save Save &

Household Type * Two Parent Family

Income US\$0.00

Client Count 3

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Pre Ass
(50416) Test, Baby		No	-Select-	06 / 04 / 2019	23 23 0
(50415) Test, Justin		No	-Select-	06 / 04 / 2019	23 23 0
(50414) Test, Rachel		No	-Select-	06 / 04 / 2019	23 23 0

Add/Delete Household Members Hous

Previous Household Members

Individual Client Assessment

Household Members

- (50416) Test, Baby
Age: Unknown
- (50415) Test, Justin
Age: Unknown
- (50414) Test, Rachel

Client Record

Name

Name Data Quality

Alias

Social Security

Issue ID Card

1. Answer "Yes" to the "Head of Household" (HoH) question for the head of household.
2. For every other family member, select their relationship **TO** the head of household. Only ONE household member listed as Head of Household.

3. "Joined Household" date **pre-populates** to back-date (do not edit).

4. Save & Exit.

ROI Tab

- Release of Information
- Remember: every household member age 18+ must sign their *own* ROI (guardians can sign for minors)
- Even though you've uploaded the ROI, you still have to electronically indicate that there is an ROI on file!

Add a New Release of Information

Client - (46465) Test, Peter John



(46465) Test, Peter John

Release of Information: **None**

This will say **None** until you add an ROI.

Switch to Another Household Member -

Submit

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Release of Information

Provider

Permission

Start Date

End Date

Add Release of Information

No matches.

1. Click "**Add Release of Information.**"

Release of Information

Release of Information - (46465) Test, Peter John

Household Members

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

(7172) Couple With No Children

(46465) Test, Peter John

(50550) Test, Rachel

Release of Information Data

Provider * Coordinated Entry: Nashville-Davidson County (CE) (411) Search My Provider Clear

Release Granted * Yes

Start Date * 07 / 08 / 2019

End Date * 07 / 08 / 2020

Documentation Signed Statement from Client

Witness

Save Release of Information

Cancel

2. To **tag** multiple family members at once to be connected to this ROI, select the check marks beside their names. Remember, an original signed HMIS ROI must also live at the agency.

3. Release Granted = "**Yes.**" Fill in **End Date. Documentation** type should be "Signed Statement from Client." **Save** Release of Information.

Entry/Exit Tab

- Entries

Entry/Exit Tab – Add an Entry

Client Information | Service Transactions

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

1. Click "Add Entry/Exit."

2. **Include** each household member by checking the box next to their name (if applicable).

3. For the "Type" dropdown, choose "Standard."

4. The Project Start Date (Entry Date) will default to the Back Date. Do not change the date or time.

The "Provider" will default to the EDA mode you have selected. Do not change this.

Household Members

To include Household members for this Entry / Exit, click the box next to their name. Household members from the SAME Household may be selected.

(7172) Couple With No Children

(46465) Test, Peter John

(50550) Test, Rachel

Project Start Date - (46465) Test, Peter John

Provider* | Coordinated Entry: Nashville-Davidson County (CE) (411)

Type* | Standard

Project Start Date* | 07 / 08 / 2019 | 8 : 58 : 05 AM

Save & Continue | Cancel

Entry Assessment

Entry/Exit Data



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

Provider *

Type *

Household Members Associated with this Entry / Exit

	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
	(46465) Test, Peter John	Yes	07/08/2019						
	(50550) Test, Rachel	No	07/08/2019						

Entry Assessment

Select an Assessment

CE Preliminary Assessment

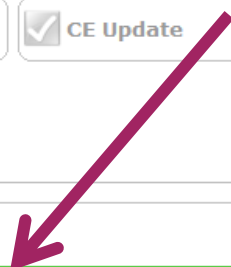
VI-SPDAT

CE Update

CE Exit

CE Follow-Up

Pay attention to Section Headings! These will tell you which data elements must be completed for Head of Household only; All Adults in Household; or All Household Members (Adults & Minors)



Household Members

- (46465) Test, Peter John
Age: 40
Veteran: Yes (HUD)
- (50550) Test, Rachel
Age: 29
Veteran: No (HUD)

CE Preliminary Assessment

Entry Date: 07/08/2019 08:58:05 AM

Section (1): Complete for All Household Members (Adults & Minors)

***Relationship to Head of Household ***

Client's Date of Birth: / /

Entry Assessment – Section 1

Household Members	CE Preliminary Assessment	Entry Date: 07/08/2019 08:58:05 AM
<input checked="" type="checkbox"/> (46465) Test, Peter John Age: 40 Veteran: Yes (HUD)	Section (1): Complete for All Household Members (Adults & Minors)	
<input checked="" type="checkbox"/> (50550) Test, Rachel Age: 29 Veteran: No (HUD)	*Relationship to Head of Household * Self (head of household) G	
	Client's Date of Birth: 01 / 01 / 1979 G	
	Date of Birth Type * Full DOB Reported (HUD) G	
	Gender * Male	
	Client's Primary Race: * American Indian or Alaska Native (HUD) G	
	<i>Secondary Race (only if recorded)</i> Asian (HUD) G	
	Client's Ethnicity: * Non-Hispanic/Non-Latino (HUD) G	
	Pregnant? -Select- G	1. Make sure to complete all demographic information.
	If yes, do you know your approximate birth date? -Select- G	
	If Yes, Projected Birth Date: / / G	2. Pregnancy question to be asked to any and all members of the household who can biologically become pregnant. If it doesn't apply, SKIP.
	<i>Only Answer if Client is a Veteran: Please indicate if the client qualifies for V.A. Medical Services through the Tennessee Valley Healthcare System (TVHS)</i>	
	If (Yes) to being a veteran, do they qualify for health services through TVHS? -Select- G	3. This question is only to be asked for those that identify as a VETERAN . If they do not, SKIP.
	Disability Information:	

Entry Assessment – Disabling Conditions

If you answered **“Yes”** to **Does the Client Have a Disabling Condition**, click **“Add.”**

Add Recordset - (46465) Test, Peter John

If yes to disability, please

Disability Type	-Select-
Disability determination	-Select-
If Yes, Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently	
Start Date *	02 / 01 / 2019
Note on Disability	
Above condition is going to be long term? (Retired)	
End Date	

Save Save and Add Another Cancel

1. On Disability pop-up, select Disability Type. **Only select responses with (HUD) after them!**

2. Answer **“Yes”** for Disability Determination.

3. Start Date is pre-populated with Back Date. Check to make sure this = program enrollment date.

4. Leave End Date blank.

5. If client has more than one disabling condition, click **“Save and Add Another.”** Otherwise, just click **“Save.”**

6. After **saving**, click the Red Triangle to complete HUD Verification.

Entry Assessment – Disabling Conditions

- Remember: information in HMIS is **self-reported**. If client reports no disabling conditions, *even if* you know they have a disabling condition, you should record their response as “No.” This can be updated later, if they choose to share that information.
- Do not record client’s specific diagnosis anywhere in HMIS!
- Only choose options with (HUD) after them.
- If client reports both Alcohol *and* Drug Abuse, enter **separate records** for Alcohol Abuse (HUD) and Drug Abuse (HUD).
- If client reports more than one disabling condition in a single category, enter **multiple records** with the same Disability Type (e.g., Bipolar Disorder & Generalized Anxiety Disorder → two “Mental Health Problem (HUD)” responses).

HUD Verification


HUD Verification

HUD Verification: If yes to disability, please describe (click 'Add') for 03/04/2019

Per Disability Type, the current records for If yes to disability, please describe (click 'Add') as of 03/04/2019 displayed below. Any previous records for If yes to disability, please describe (click 'Add') not overlapping as of 03/04/2019 are not displayed. In the event that multiple records exist per Disability Type as of 03/04/2019, records containing values will be displayed and take precedence for reporting purposes.

Select the Disability determination value for all incomplete Disability Type records

- No (HUD)
- Client doesn't know (HUD)
- Client refused (HUD)
- Not Asked
- Data not collected (HUD)
- Unknown to the V.A.
- Incomplete

Disability Type	Disability determination							Incomplete
	Yes (HUD)	No (HUD)	Client doesn't know	Client refused (HUD)	Not Asked	Data not collected (HUD)	Unknown to the V.A.	
 Alcohol Abuse (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Both Alcohol and Drug Abuse (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chronic Health Condition (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Developmental (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Drug Abuse (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
HIV/AIDS (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mental Health Problem (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

1. You must complete the **HUD Verification** sections (regardless of whether you answered "yes" or "no" that the client received any).
2. After adding any insurance source, click the "**HUD Verification**" red triangle.

3. Once you see this screen, select "**No**" at the top (this confirms that the client does **not** have any of the disabling conditions that you did **not** select). This will fill in "no" for every answer choice that you did not choose.

4. **Save & Exit.**










HUD Verification 

5. You'll end up with a **green check!**

Entry Assessment – Health Insurance

Add Recordset - (46465) Test, Peter John

Health Insurance

Start Date *	02 / 01 / 2019    G
Health Insurance Type	-Select-  G
(If Yes to Other) Specify Source	<input type="text"/>
Covered?	-Select-  G
(HOPWA) If Private Pay Insurance, Specify	<input type="text"/>
(HOPWA) If No, Reason not covered	-Select-  G
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>    G

Follow the same steps for **Health Insurance**.

- Start Date auto-populates to Back Date. Leave End Date blank.
- Select the Health Insurance Type from the dropdown (if "Other," specify.)
- Select **"Yes"** for "Covered?"

Don't forget
HUD Verification!

HUD Verification



Entry Assessment - Section 2

Section (2): Complete for Head of Household

Choose where the CE Intake took place. There is a drop down with numerous options.

Where did the CE intake take place?

Catholic Charities G



Case Notes/Details:

Date of Case Note: *

Case Notes:

Navigator Assigned:

Add

Does the household want to work towards permanent housing?

Yes G

Does the household want assistance and/or resources finding permanent housing?

Yes G



Housing Situation Questionnaire

Date of Housing Status:

Where did you sleep last night?

Where do you plan to stay tonight?

Has a (3)-day notice been issued?

Upcoming Court Date:

Add

No matches.

Entry Assessment: Section 2

1. Click "Add" to add a new case note. There should be a case note at Entry, at least every 90 days, and at Exit.



Add Recordset - (46465) Test, Peter John

Case Notes/Details:

Note: Please avoid putting details of criminal histories here or any communicated at the CARE Coordination Meetings!

Date of Case Note: * 07 / 08 / 2019

Case Notes:

Client Assigned to Navigator: -Select- G

Navigator Assigned: -Select- G

Date Assigned to Navigator: / /

Date Navigator stopped working with client: (If applicable) / /

Navigator Phone Number:

Navigator Email:

Where did the CF intake take place? Cathi

Case Notes/Details:

Date of Case Note: *

Add

Does the household want to work towards permanent housing? Yes

Does the household want assistance and/or resources finding permanent housing? Yes

Housing Situation Question

2. Case notes are to be brief and housing related. Be sure to include your first initial and last name at the end of each case note.

3. If you are working with the client, or know who is working with the client on housing be sure to mark them as the navigator with the appropriate contact information.

Entry Assessment: Section 2

Section (2): Complete for Head of Household

Where did the CE intake take place?

Catholic Charities



Case Notes/Details:

Date of Case Note: *

Case Notes:

Add

Does the household want to work towards permanent housing?

Yes

G

Does the household want assistance and/or resources finding permanent housing?

Yes

G



Housing Situation Questionnaire

Date of Housing Status:

Where did you sleep last night?

When did you last sleep on the street?

issued?

Issued Court Date:

Add

No matches.

These two questions help gain the understanding of what the plan with the client will look like. If they say "Yes" to both and are LITERALLY Homeless, you will conduct a VI-SPDAT. If they say "No" you will need to continue to gain more rapport with the client to figure out the root cause of the no.



Entry Assessment: Section 2

Housing Situation Questionnaire

Add Recordset - (46465) Test, Peter John

Housing Situation Questionnaire

Date of Housing Status: 07 / 08 / 2019

Housing Situation

Note: If client was/is in an ES and will be staying in a Motel or Hotel (please complete BOTH the ES and the Hotel/Motel Sections)

Where did you sleep last night? -Select- G

Where do you plan to stay tonight? -Select- G

Diversion Questions

If it was family or friends, how long have you been there? -Select-

How much longer can you stay? -Select-

Eviction Status

If client is currently housed, but being evicted answer the following

Has a (3)-day notice been issued? -Select- G

Date of Eviction: / / G

Have you been to court? -Select- G

Upcoming Court Date: / / G

Do you have any past evictions? -Select- G

If yes, how many? G

Do you owe any money? If yes, indicate the amount. G

Who is responsible for the rent?

Add

1. Click "Add" to add a new Housing Situation Questionnaire.

2. You will answer the first 2 questions and based on the answer to those you will fill out the correlating section.

3. This should be updated every time a person's housing situation changes.

Entry Assessment – Homeless History

Section (3): Complete for All Adults (including He

1. Client Location is ALWAYS TN-504.

*Client Location G

Indicate below where the client spent the night prior to entering the program:

*Residence Prior to Project Entry G

2. Residence prior to project entry is asking *where did the client sleep last night*. Based on how you respond questions pertaining to that response will populate.

How long did they stay there?

*Length of Stay in Previous Place G

*Approximate date homelessness started: / /    G

*Regardless of where they stayed last night - Number of times the client has been on the streets, in ES, or SH in the past three years including today G

*Total number of months homeless on the street, in ES or SH in the past three years

4. Approximate date homelessness started, is for this episode of homelessness



3. Length of Stay in previous place, is how long has the person been in the placement that was entered in the Residence Prior to Project Entry field.

Entry Assessment – Income

Income Information:

Total Monthly Income:
**HUD Question: Put child's income ONLY on Head of Household. Each adult in family should have income recorded on their individual file.

Income from Any Source G

 **If yes to cash income, please describe (Click 'Add')** **HUD Verification** 

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

Required for all **Adults.**

2. If a client has no income, complete **HUD Verification** and select "No" for all sources.
3. If the client has income, select **Add**. A pop-up window will appear (following slide).

Entry Assessment – Income

Add Recordset - (46465) Test, Peter John

If yes to cash income, please describe (Click 'Add')

Monthly Amount	<input type="text"/>	G
Source of Income	-Select-	
If Other, Please Specify	<input type="text"/>	G
Receiving Income Source?	-Select-	G
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	23 23 G
Start Date *	02 / 01 / 2019	23 23 G

1. Enter monthly income amount.

2. Select appropriate source of income. Always select the option with (HUD) following it.

3. Select "Yes."

4. Leave end date blank. Start Date is pre-populated with Back Date.

NOTE: If the client already has an income source listed in their entry assessment, but they are no longer receiving it, click on the pencil next to that income source to edit. Add an **end date** of the day before program enrollment date. Leave "Receiving Income Source?" as "Yes."

Don't forget **HUD**
Verification!

Entry Assessment – Income

- Income = **regular, recurring** sources of income
 - Lump sums should *not* be recorded (e.g., disability back-payment, court settlement)
 - Very sporadic work should *not* be recorded
- If needed, take the average of several months' paystubs to determine a monthly amount.
- Food Stamps are not Income (those are recorded as Non-Cash Benefits).
- If a minor child in the household receives income (e.g., through a job, disability), record that in the Head of Household's assessment.

Entry Assessment – Non-Cash Benefits

Non-cash Information:

Non-cash benefit from any source

-Select-

G



If yes to non cash benefit, please describe (Click 'Add')

HUD Verification



Source of Non-Cash Benefit

Receiving Benefit?

Start Date *

End Date

Add

Follow the same steps for **Non-Cash Benefits**.

NOTE: If the client already has a non-cash benefit source listed in their entry assessment, but they are no longer receiving it, click on the pencil next to that income source to edit. Add an **end date** of the day before program enrollment date. Leave "Receiving Income Source?" as **"Yes."**

Don't forget **HUD Verification!**

Entry Assessment – DV Questions

If you answer "Yes" to the first question, you need to answer the remaining questions. The questions build off one another.

Domestic Violence History:

Is Client a Survivor of Domestic Violence?

-Select- G

If yes for Domestic violence victim/survivor, when experience occurred

-Select- G

If yes for Domestic Violence Victim/Survivor, are you currently fleeing?

-Select- G

If client is currently fleeing domestic violence, please provide description for safety plan if household in danger!

G

Entry Assessment – Client Contact Information

(HUD)

TANF Child Care Services (HUD)

Other Source (HUD)

Other TANF-Fur (HUD)

Add

Domestic Violence Histor

Is Client a Survivor of Domestic Violence?

If yes for Domestic violence victim/survivor when experience occ

If yes for Domestic Violence Victim/Survivor are you currently flee

If client is currently fleeing domestic violence, please provide description safety plan if house in danger!

Section (4): Complete

Add Recordset - (46465) Test, Peter John

Client Contact Information

**Please list the address for emergency shelters if applicable as well mailing*

Address Type: -Select- G

Street Address:

City: -Select- G

State: -Select- G

Zip Code: G

Client Phone Number: G

Entry Date: 07 / 08 / 2019 G

End Date: / / G

Facebook: G

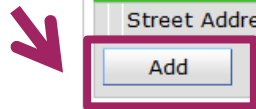
Twitter: G

Client's Email Address: G

Save Save and Add Another Cancel

Fill out what you have, there are different types of address types. Phone number and email are key. For Facebook and Twitter, follow you agency policy!

You will click "Add" to add a contact, you can add as many as needed.



Entry Assessment – Emergency Contacts

Emergency Contacts should be just that, for a true emergency.

If yes for Domestic violence victim/survivor, when experience occurred

If yes for Domestic

provide description for safety plan if household in danger!

Section (4): Complete for Heat



Client Contact Informa

Street Address:

Add

Add Recordset - (46465) Test, Peter John

Emergency Contacts

Contact's Name

G

Note: HMIS Users: Please avoid "yourself" as the Emergency Contact.

Contact's Address

G

Contact's City

G

Contact's State

-Select- v

G

Phone Number

G

Second Phone Number

G

Relationship to Client:

-Select- v

G

Start Date *

07 / 08 / 2019



G

End Date

/ /



G

Save

Save and Add Another

Cancel

You will click "Add" to add a contact, you can add as many as needed.



Add

Entry Assessment – VI-SPDAT

Save

1. Make sure to click "save" at the end of the assessment. You will then scroll all the way to the top.

Entry Assessment

Select an Assessment

CE Preliminary Assessment

VI-SPDAT

CE Follow-Up

2. If your client is literally homeless (street, shelter, place not meant for human habitation) you will complete a VI-SPDAT. Make sure to click on the VI-SPDAT Assessment Tab.

Household Members

- (46465) Test, Peter John
Age: 40
Veteran: Yes (HUD)
- (50550) Test, Rachel
Age: 29
Veteran: No (HUD)

VI-SPDAT

Entry Date: 07/08/2019 08:58:05 AM

YOUTH ASSESSMENT (18-24 year olds Only)

TAY-VI-SPDAT v1.0

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

Add

FAMILY AS Add New TAY-VI-SPDAT v1.0 Record

VI-FSPDAT v2.0

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

Add

INDIVIDUAL ASSESSMENT

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

3. You will "add" the appropriate VI-SPDAT.

- TAY-VI-SPDAT for INDIVIDUALS 18-24 years old.
- VI-FSPDAT is for FAMILIES WITH MINOR CHILDREN
- VI-SPDAT is for INDIVIDUALS, can include couples, families with just adults, etc.

Entry Assessment – Other Household Members

	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
 	(46465) Test, Peter John	Yes	 07/08/2019						
 	(50550) Test, Rachel	No	 07/08/2019						

Include Additional Household Members

Showing 1-2 of 2

Entry Assessment

Select an Assessment

CE Preliminary Assessment

VI-SPDAT

CE Update

CE Exit

CE Follow-Up

If there is more than one member of the household, scroll up, click on each remaining household member's name and complete their Entry Assessment.

(46465) Test, Peter John

Age: 40

Veteran: Yes (HUD)

(50550) Test, Rachel

Age: 29

Veteran: No (HUD)

Section (1): Complete for All Household Members (Adults & Minors)

***Relationship to Head of Household ***

Self (head of household)

Client's Date of Birth:

01 / 01 / 1979

Date of Birth Type *

Full DOB Reported (HUD)

Remember: Read Section Headings!

Entry/Exit Tab

- Updates
- Exits

Entry/Exit Tab – Updates

1. Choose appropriate **Enter Data As** mode.
2. ClientPoint: Enter HMIS ID in “Client ID #” field to directly locate the client’s record.
3. Back Date Mode: **Back date to date of Update**. This could be the date you met with a client, called a client, learned of changes in client information, etc.
4. Click on “Entry/Exit” Tab.
5. Click on form icon under “Interims.”

Client Information | Service Transactions

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

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

Entry / Exit						
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Coordinated Entry: Nashville-Davidson County (CE) (411)	Standard	07/08/2019				

Add Entry / Exit

Showing 1-1 of 1

Entry/Exit Tab – Updates

Back Date 02/10/2019 12:01:00 AM

file

Client (46465) Test, Peter John

Interim Reviews

Interim Reviews Associated

Review Date Review

Add Interim Review

Add Interim Review - (46465) Test, Peter John

Household Members

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

(7172) Couple With No Children

(46465) Test, Peter John (Entry Date: 02/01/2019 12:01 AM)

(50550) Test, Rachel (Entry Date: 02/01/2019 12:01 AM)

Entry / Exit Provider Metro Critical Time Intervention (CTI) Grant (545)

Entry / Exit Type Standard

Interim Review Type * Update

Review Date * 02 / 10 / 2019 12 : 01 : 00 AM

Save & Continue Cancel

1. Click “**Add Interim Review**,” and another pop-up box will appear.

2. Select “**Update**” for Interim Review Type.

3. **Review Date** will pre-population with **Back Date**. Do not change date or time stamp.

4. Save & Continue.

Entry/Exit Tab – Updates

file

Back Date 02/10/2019 12:01:00 AM

Add Interim Review - (46465) Test, Peter John

Household Members

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

- (7172) Couple With No Children
- (46465) Test, Peter John (Entry Date: 02/01/2019 12:01 AM)
- (50550) Test, Rachel (Entry Date: 02/01/2019 12:01 AM)

Interim Reviews

Interim Reviews Assoc

Review Date Review

Add Interim Review

1. Click **"Add Interim Review,"** and another pop-up box will appear.

Entry / Exit Type Standard

Interim Review Type * Update

Review Date * 02 / 10 / 2019 12 : 01 : 00 AM

Add Entry / Exit

2. Select **"Update"** for Interim Review Type.

3. **Review Date** will pre-population with **Back Date**. Do not change date or time stamp.

4. Save & Continue.

Save & Continue Cancel

Entry/Exit Tab – Updates


1. When the Update Assessment loads you will notice it looks very similar to the Entry Assessment. All fields will be pre-populated with information from the Entry Assessment.
2. Update anything and everything that has changed since the entry.
3. Do not change *previous* Case Notes, housing situations, and contacts – just **add new ones**.
4. Remember to **also** add a Case Note, indicating any updates and any changes that were made.








Entry/Exit Tab – Exit Assessment

1. Choose appropriate **Enter Data As** mode.
2. ClientPoint: Enter HMIS ID in “Client ID #” field to directly locate the client’s record.
3. Back Date Mode: **Back date to Exit Date.**
4. Click on “Entry/Exit” Tab.
5. Click on pencil icon under “Exit Date.”
6. Remember for CE you should not exit a person unless they are permanently housed or being marked as inactive. If they are exiting your program due to non-compliance but are still homeless, **DO NOT EXIT THEM FROM CE.**

Client Information | Service Transactions

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

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

Entry / Exit						
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
 Coordinated Entry: Nashville-Davidson County (CE) (411)	Standard	 07/08/2019				 2 

Add Entry / Exit

Showing 1-1 of 1

Exit

Exiting a Client

Edit Exit Data - (46465) Test, Peter John

Household Members

To update Household members for this client, include each household member in the Exit by checking the box next to their name (if applicable).

- (7172) Couple With No Children
 - (46465) Test, Peter John
 - (50550) Test, Rachel

Edit Exit Data - (46465) Test, Peter John

03 / 01 / 2019 12 : 01 : 00 AM

-Select-

-Select-

-Select-

Save & Continue Cancel

2. **Exit Date** will pre-populate with **Back Date**. Do not edit date or time stamp.

3. Select "**Reason for Leaving**" and "**Destination**" (if "Other," specify). Avoid choosing "Other" if possible. "**Reason for Leaving**" should only be "*CE Exit: Permanently Housed*" or "*CE Exit: Inactive*."

4. Save and Continue.

Exiting a Client

Select an Assessment

CE Preliminary Assessment

VI-SPDAT

CE Update

CE Exit

CE Follow-Up

Household Members

- (46465) Test, Peter John
Age: 40
Veteran: Yes (HUD)
- (50550) Test, Rachel
Age: 29
Veteran: No (HUD)

CE Exit

Exit Date: 07/08/2019 10:16:40 AM



If inactive: Last Known Location:

G

If housed: Is individual or family connected to supportive services?

G

If yes, please indicate the agency providing support:

There are a few new questions based on the exit type.

- The Exit Assessment looks similar to the Entry Assessment. All fields will be pre-populated with information from the Entry Assessment or the last update.
- If no exit interview was completed (e.g., because client disappeared), do NOT update any fields. Leave all fields as they were at entry.
- Make any necessary changes to Disabling Condition, Health Insurance, Income, Non-Cash Benefits, and DV status for all household members.

Questions?

Contact the HMIS Help Desk:

HMISHelp@Nashville.gov