Quick Guide: HMIS 100 – CES Individuals/Youth

Learning Objectives

After reviewing this guide you will be able to:

⇒ Enter & Maintain a client profile
⇒ Assess & enroll clients into your program
⇒ Record program services & document case management
⇒ Exit clients from your program

Sign-In to HMIS

HMIS Website: la.clarityhs.com
My Username: ______________

User Functions

User Profile
Click the initials or picture in the upper-right hand corner to:
⇒ Sign Out
⇒ Change Profile Picture
⇒ View Profile

Caseload
Lists participants you have enrolled in a program, or the participants for whom you are the Assigned Staff person in HMIS

Search
Query the database for existing HMIS Profiles

Launcher
Additional HMIS functions, including Reports and Calendar

Messaging
HMIS messaging feature, allowing provider-to-provider instant messaging

Enlightening Tips
Launcher functions:
Reports - System and Program reports
Calendar - Compiled appointments with participants

Personal Notes

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Last Revised: 1/16/2019 (TB)
Search HMIS Profile

Begin each session by searching. It is important to do a thorough search in HMIS to avoid creating a duplicate record.

**Three Steps to Search:**
Search + Identify + Verify (Using Profile and History tabs)

**Search**
The Search bar will begin making suggestions as you type. At any point, clicking the Search button will list all results matching the information in the Search bar.
You can use any one or combinations of the following to Search:

- **First Name** *
- **Last Name** *
- **Alias** *
- **Year of Birth**
- **Unique Identifier**
- **Last Four Digits of Social Security Number**

**Identify**
Among the results, we can identify information matching the HMIS profile for which we are looking.
If there are no matching results, we should try a different combination from the information points above. The more information we enter, the more narrow the search; as such, it is best to start broadly so as to not miss a possible match.

**Verify**
Before using a Profile that we have found, we want to be sure that the record matches the participant for whom we were looking.
Using the following elements in the **Profile** and **History** we want to establish (beyond a reasonable doubt) that we have the participant’s record:

- **Profile Picture** [Profile]
- **Basic Information** [Profile]
- **Demographic Information** [Profile]
- **Active Programs** [Profile]
- **Recent Services** [Profile]
- **Past Enrollments** [History]
- **Past Assessments** [History]
- **Past Services** [History]

On the **History** tab, the latter data elements (and others) are color-coded:

- **Program Enrollments**
- **Completed Assessments**
- **Referrals (System)**
- **Provided Services**
- **Crisis/Emergency Shelter Bed Reservation**

If unsure or unable to find a matching **Profile**, add a new HMIS Profile.

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**Enlightening Tips**
* It is best to use just a few letters of a name to start, in order to avoid missing their profile because their name is spelled differently than assumed.
If I am looking for Marian King in HMIS, I can try any of the following combinations of information.


On the History tab we can click the “Show Advanced Search options” link at the top of the page to filter the participant’s History for specific Programs, Program Types, Services, and more.
If History does not initially appear, clear the Advanced Search options fields, then click Search.
If there are still no results in the participant’s History, they may not have one.
You can also use the other tabs at the top of the page [Assessments, Notes, Files, Location, Programs] to review additional information about the participant.
Add New Profile

**On the Search page, click this button:**

**Release of Information (ROI)**

We must an answer for the Release of Information (ROI) - yes or no.

If **Yes** -
We need Documentation in order to share their Protected Personal Information in HMIS

- *Electronic Signature*: Complete an e-signature for consent
- *Attached PDF*: Upload the scanned signed document
- *Signed Paper Document*: Provide location of signed form

If **No** -
A compliance warning ribbon will appear across the screen of any client profile that is missing a signed ROI

**Verbal Consent**: May be used* if the initial interaction with a person is through a phone screening, street outreach field experience, or through community access center sign-ups. At the time of being assessed, the participant needs to provide written (electronic or paper) consent.

* The participant must be informed that their information will be entered into HMIS, and the terms of the ROI must be explained to each person

**Household**: May be used for a dependent within a Household (i.e. children) when the Head of Household has consented to the HMIS ROI.

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**Enlightening Tips**

If the participant does not provide consent to share their information in HMIS, after adding the HMIS profile, go under Client Privacy (green shield in the right margin) and changed ‘Client Privacy’ from “Public” to “Private.” This limits the visibility of this profile to the agency that created it.
Add New Profile (Con’t)

Required Fields (including Data Quality):

Social Security Number
Select the Quality of SSN option:
⇒ Full SSN Reported
⇒ Approximate or Partial SSN Reported
⇒ Client Doesn’t Know (Does not know/have SSN)
⇒ Client Refused
For any number not provided by the participant, enter a zero (0)

Last/First Name
Select the Quality of Name option:
⇒ Full SSN Reported
⇒ Partial, Street or Code Name Reported
⇒ Client Doesn’t Know
⇒ Client Refused
For participant that does not provide a name, enter a physical description using the First Name and Last Name boxes (e.g. Red Hat, Eagle Tattoo)

Date of birth: MM/DD/YYYY;
Select the Quality of DOB option:
⇒ Full DOB Reported
⇒ Approximate or Partial DOB Reported (if year is provided)
⇒ Client Doesn’t Know
⇒ Client Refused
For participants that do not provide the Month and/or the Day of their DOB, enter “01” for either missing field. The year - if not provided - can be an approximation of the participant’s year of birth.

Self-reported Gender Identity
⇒ Female
⇒ Male
⇒ Transgender Female (Transgender, Male to Female)
⇒ Transgender Male (Transgender, Female to Male)
⇒ Gender Non-Conforming
⇒ Client Doesn’t Know
⇒ Client Refused

Self-identified Ethnic Identity
Self-identified Race or Racial Identities
Participants may self-identify with any Racial Category, regardless of what they identified as their Ethnicity.

Veteran Status (appears only if participant is over 18 years old)
**Household Management**

**Profile: Household Members - Manage**
Click “Manage” next to Household Members on Profile

![Household Members Manage]

**Household Management**
Adding a New Household Member:
1. Use the Search bar (under Household Management) to identify the HMIS profile of the Household Member;
2. Scrolling to the left of their name (below the Search bar), click the Add/Join text.

**Add** - Participant is an individual / not associated to another person
**Join** - Participant is associated with one or more Household members

If associated to another participant or with other participants, clicking “Join” will remove the selected person from their present Household and add them to the Household of the HMIS profile you are under.

Existing Household Members will appear on the right column, under Household Members.

**Star**: Head of Household

Hover over a member of a Household to make the pencil icon appear
Under Household Management, the pencil icon open the relationship manager menu where you can:

- Change the Head of Household
- Change/Set Member Type (Relationship to Head of Household)
- Exit a Member from the Household

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**Enlightening Tips**

A **Household** is defined as an individual, or a group of persons who live together (but are not a Family as defined below).

A **Family** is a Household with one or more minor-dependents who are under the custody of a Household member.

**Start Date** is the date the Household is being entered into the HMIS database.

You would Exit a member from a Household when that member no longer lives with the Household they are currently under in HMIS.

While a participant may be a part of a Household of multiple members, if your Program serves individuals, you will enroll only the person(s) receiving services through your program.

**Best Practice**: Add Household Members while under the Head of Household’s HMIS Profile.

Always search for each Household member in HMIS prior to creating an HMIS profile for them.

Outside of Household Management, clicking on the pencil-icon near a Household member’s name will move you into the HMIS profile of that Household member.

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**Personal Notes**

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Privacy & Information Sharing

**Release of Information**
Where a participant has not given consent to the Release of Information, mark the Permission as ‘No.’

Once you have saved the Profile record, click the Privacy shield icon on the right-hand column.

**Client Privacy**
When a participant has not consented to the Release of Information, under Client Privacy click “Private” (the active setting is set in white, with dark grey text). This will hide this Profile from all but your agency/organization (if referred to the Community Queue, Matchers would have access to the HMIS profile).

If the participant did consent to the Release of Information then the Documentation (Attached PDF or Electronic Signature) will be available as a PDF toward the bottom of the page.

A Release of Information can be added to an Existing HMIS profile through this window by clicking ‘Add Release of Information’.

Completing an Assessment in HMIS

**Assessment**
Identify the population appropriate questionnaire to offer to the participant:

- **Next Step Tool** - for Transitional Age Youth; ages 16 to 24
- **CES Survey** - appropriate for any population

In order to save, there needs to be an answer recorded for every field.

Two new assessments have been added to the production site for CES HP programs, named as:

- CES for Youth—Homelessness Prevention Targeting Tool
- CES for Individuals—Homelessness Prevention Targeting Tool

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**Enlightening Tips**

**Best Practice:**
Complete the Assessment in the printed packet then enter the answers into HMIS; will not save an incomplete Assessment.

Re-doing the CES Survey would only be needed if the participant has had considerable life changes that affect vulnerability (i.e. occurrence of a (mental/physical) health condition.)

**Referral Note:** Here you can explain specific needs a participant may have in searching for a housing resource, such as elevator access.
Completing an Assessment in HMIS (Continued)

ADA Questions Added to VI-SPDAT and NST
The questions below have been added to the end of the Residency and Preferences section:

Question for Participant (Q38): Some housing units have disability-related features that make it easier for people with certain disabilities to live in that housing. If you or anyone in your household are to be placed in housing, would need:

⇒ Yes: a mobility unit
⇒ Yes: a hearing/vision unit
⇒ Yes: a mobility and hearing/vision unit
⇒ No

Question for Staff (Q39): Based on your observation, does this person (or a person) in this household appear to have:

⇒ A mobility disability (uses a wheelchair, walker, or has difficulty walking)
⇒ A hearing disability (deaf or hard of hearing)
⇒ A visual disability (blind or low vision)
⇒ None of the above

Question for Staff (Q40): Based on your observation, might this person (a person) in this household need assistance to communicate as effectively as someone without a disability (i.e. sign-language interpreter, large print or braille documents, hearing assistance device)? If yes, ask which assistance aides they need.

⇒ Yes
⇒ If Yes: __________
⇒ No
Youth: Assessments - First Disclosure and Edits

In completing the Next Step Tool, your youth participant is encouraged to provide information that is as accurate as possible.

Should the participant hold back/not disclose certain information at the time of completing the Next Step Tool, the protocol for Youth providers is to get approval from the Program Manager before returning to edit the existing Survey.

Managing HMIS Profile: Participant Tabs

**Notes**
Provide general (non-medical) information or notes toward the best practice(s) of approach for the participant.

**Public Alerts**
Describe situations/instances of violence, hostility, or aggression involving your participant and other clients or staff.

*Expiration Date:* The warning banner on the participant’s profile will disappear after this date; the date can be changed by editing the Alert under the Notes tab.

**Files**
Uploaded files may include consented documentation towards program eligibility or verification of the participant’s information.

**Location**
**Add Address** -
Records physical address(es) relevant to the participant; work address, school address, mailing address, address of emergency contact, etc.

**Locate (button)** -
Records the point-in-time location of a Street Outreach experience with the participant [yellow marker(s) on the map]

Enlightening Tips
We do not enter information that discloses or alludes to medical conditions or diagnoses. However, the Note/Alert can direct a provider to review the file kept at the agency, where confidential information would be appropriately kept.

Files may include a participant’s consented documentation towards program eligibility or verification of the participant’s information (but not medical documentation); e.g., Birth Certificate, Homeless Verification, AB109, FSP, DPSS iD, etc.

Personal Notes
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Youth: Notes - ILP Eligibility Confirmed

As a case manager, if you have confirmed your youth participant as being Independent Living Program (ILP) eligible - typically a youth having gone through the foster care system - then under the Notes tab, create and title a Note, “ILP Eligibility Confirmed”.

In addition to the Note, under the Files, add a file of their ILP Eligibility Confirmation form (when available):

**Category** ‘Family, Social and Legal’
**Name** ‘ILP Eligibility Form’

Managing HMIS Profile: Location

Under Location, we would look to add the Address(es) of places relevant to our participant. Two possible Locations you may record are:

1. **Current Location** - The address of primary nighttime residence, if the participant is at-risk of experiencing homeless or currently housed; and,
2. **Destination Address** - The address of the Household’s primary nighttime residence when exiting your program, when exiting to a physical address (not a shelter or another agency)

You may also record:

- School Address
- Work Address
- Mailing Address
- Emergency Contact(s)
- Temporary Address
- Forwarding Address

**Enlightening Tips**
If participant is a part of a Household, you would only need to record these addresses under the Head of Household.

**Rapid Re-Housing Program**:
After marking the participant’s Move-In Date under the Program record, return here to Location to “Add Address” for the housing resource to which they will be connected.

Personal Notes

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Programs: Enrollment

This page displays the Program History and Programs: Available sections. Within the Program History we can see the past (and present) program enrollments - if presently being served by a program, until the End Date will be the green text “Active”.

Enrollment
There needs to be an answer recorded for every field - even if that answer is Client Doesn’t Know/Client Refused
If enrolling more than one member of a Household:
Check of the name of the additional Household member(s) on the bottom-left of the Program window.
HMIS will lead you to complete the Enrollment questions for each selected household member.

Youth: Program Enrollment

Unique to the Youth/TAY population, the enrollment questions asks the following questions:
- Did you run away from home or a foster care home?
- Are you a current or former foster care youth?
- Have you ever been in the juvenile justice system?
- Have you ever been on adult probation?
- Which of the following best represents how you think about yourself?

The latter question asks for the participant’s self-identified Sexual Orientation. The participant’s response to this question does not affect their housing placement or options.
Referral(s)
For each type of referral provided, designate the status of that referral, starting from Referral - Made and ending in:
Referral - Attained (participant connected to service/provider)
Referral - Not Attained (participant not connected to service/provider)
Unknown (follow-up with participant or on referral could not be completed)

Motel/Hotel Vouchers
Where provided, Motel/Hotel Vouchers require:
Start & End Date - The first night the client stayed in the room (Start)
The last night the client stayed in the room (End)
Expense - Total Amount for the Period between Start and End Date
Expense Date - Day on which the Motel/Hotel is paid

⇒ Only enter this service for the Head of Household
⇒ Do not use the ‘Include Group Members’ on this service

Crisis & Bridge:
Crisis Housing and Bridge Housing are separate programs in HMIS.
When a participant enrolled in Crisis Housing needs to be moved into Bridge Housing, you will exit the participant from the Crisis Housing program, then enroll them into the Bridge Housing program.
Under both enrollments you will track the bed the participant occupied while under the respective program.

Crisis & Bridge Beds Rules of Thumbs and Daily Attendance:
For clients that are in a CES Crisis and Bridge Housing program, staff is required to go to Provide Services Tab and record the appropriate Bed services.

CES Singles/Youth– Crisis and Bridge Housing Programs:
For all Crisis Housing, there is only one service item under Bed– Crisis Housing. However, there are Bridge Housing Programs that will have multiple service items depending on the funding that the provider received (ex. Bridge Housing, Bridge Housing AB 109, and Bridge Housing HPI).

If a client does not sleep on any of these given nights during their stay range, staff will need to go back to the History and manually delete the date. See the image below for reference.
Provide Services: Swipe Card

For programs that provide Swipe Cards for their participants (as iDs and through which to track services), the services set up for Swipe can be found under the Attendance function (under the Launcher).

Once under Attendance, you will find the list of available Swipe services. To begin swiping for that service, click “Manage” to the left of the desired service’s name.

Now under the service, we can begin recording the provided services. We need to set the Date (of Service) [we can backdate services by choosing a past date].

If the scanner is not available:
We can manually record services by clicking “Add” next to a participant’s name. We can also use the Search (on the right-column; best practice: use Unique Identifier) to identify participants not listed on page.

HMIS will not allow services scanned under Attendance to be duplicated or to be provided to participants who are not enrolled in your program. When the service has been placed (provided), then the name of the participant will appear under the ‘In Attendance’ box.

💡 Enlightening Tips

The ID Card can be printed from the participant’s Profile.

On the right-column is the Client Reports (printer icon) - under these reports we can find the “Photo ID Card - Sample”.

Running this report will produce a PDF preview of the HMIS iD, which we can then print in order to create the ID card.

We can scan the Swipe Card under both the ‘Manual’ or ‘Scanned’ entry options. The ‘Manual’ entry page will include a list of Active participants who have recently received services.
Program Management

Programs - Provide Services

Referral(s)
For each type of referral provided, designate the status of that referral.
⇒ The first service under a Referral is always Referral - Made; then:

Follow-Up (Recorded to mark each day’s effort made to connect a participant)
Referral - Attained (Participant served/enrolled by provider receiving Referral); or,
Referral - Not Attained (Participant not served/enrolled from Referral)

For example: Participant referred to an Access Center
In HMIS this participant would have at least two referral services:
One, Referral Made; the other, Referral Attained / Not Attained

Housing Stability Plan
The Housing Stability Plan (HSP) is the standardized case management plan designed to assist participants in identifying and achieving housing-focused goals, by identifying linkages to:
⇒ Permanent Housing;
⇒ Mainstream Benefits; and,
⇒ Supportive Services

Enlightening Tips
Unless you are backdating a service, there are only a handful of services for which you need to change the listed:
• Start Date / End Date
• Expense Amount, Date
• Funding Source **

$ - Track amount given
Track start / end date

Some example services are:
Motel/Hotel Vouchers $$
TAP Card $$
Rental Assistance $$
Cost Assistance $$
Deposits $$
Utility Payments $$

** Funding Source for non-FSC program services can be left as "No Funding Source"

Moving into Permanent Housing?
When a Move-In Date is set, mark the Household’s Move-In Date in a Status Update Assessment.
When the Household has moved in, “Add Address” in the Location tab to record the Permanent Housing location where they have been placed.
Program Management (Con’t.)

**Programs - Notes (Case Notes)**

In addition to the services that you provide, you can provide Case Notes in order to detail:

- **How much time was spent with a participant in a given interaction**
  - If helping them to apply for Benefits Assistance took 2 hours
- **How much time was spent scheduling / attending / following up on a given appointment or Referral**
  - If you called 3 providers to check for program availability

If providing Case Management for example, you can complete a Case Note to record:

1. Attempts to contact a participant;
2. The context and duration of case management session (such as in completing the Housing Stability Plan); and,
3. Details regarding a given service (i.e., the duration of time spent with the participant and/or specific details of the service provision)

Unless marked *Private* (checkbox) they are visible to any HMIS User

**Program Notes** (Case Notes) are not services

**Programs - Files**

In this section we want to record documents specifically relevant to this Program (i.e. Eligibility documents, program/service relevant forms)

If previously uploaded in the top Files tab:
- Click “Link from Files”
- Click the checkbox(es) for each document relevant to your program
- Click “Link & Close” to confirm

**What’s a program relevant document?**
- California iD / Driver’s License
- Birth Certificate
- Social Security Card
- Income Verifying Documentation
- Housing Stability Form
- Housing / Support-Related Documents
- Crisis/Bridge Extension Forms
- Housing Navigation-specific Documents
- ILP-specific Documents
- Rapid Rehousing-specific Documents
- And more...
Programs: End / Program Exit

Generally speaking, we exit participants from a program by two scenarios:

1. When the participant has met the program goals and will no longer be served by the program; and,
2. When a participant “disappears.”

The second scenario speaks to the 90-Day Rule - if a participant has not been served by our program in 90 days, providers are asked to exit them from the program. For non-residential programs, the Program End Date must represent the last day a contact was made or a service was provided. For residential programs, this date represents the last day of a continuous stay in the project before the client transfers to another residential project or otherwise stops residing in the project.

In either situation, we need to describe the “Destination” and “Reason for Leaving” appropriate to the situation. For example, if our participant ‘disappeared’ when completing the Exit Survey we would mark:

- Destination - “No Exit Interview Completed”
- Reason For Leaving - “Unknown/Disappeared”

Program Management - Ended Enrollment
Follow-up Assessments are available under Program record.

Crisis & Bridge:
Crisis Housing and Bridge Housing will be separate programs in HMIS.

When separate Programs -
When a participant enrolled in Crisis Housing (bed) needs to be moved into a Bridge Housing (bed), you will exit (End) the Crisis Housing program enrollment, and enroll the participant into the Bridge Housing Program.

Presently -
When providing the service of a bed, that service has sub-categories for both Crisis Housing and Bridge Housing; select the bed appropriate for the participant.

Homelessness Prevention Programs:
For CES HP programs, there are no changes made on program enrollment process.

Crisis Housing and Bridge Housing will be separate programs in HMIS.

Program Management (Con’t, II)

Crisis Housing and Bridge Housing will be separate programs in HMIS.

When separate Programs -
When a participant enrolled in Crisis Housing (bed) needs to be moved into a Bridge Housing (bed), you will exit (End) the Crisis Housing program enrollment, and enroll the participant into the Bridge Housing Program.

Presently -
When providing the service of a bed, that service has sub-categories for both Crisis Housing and Bridge Housing; select the bed appropriate for the participant.

Homelessness Prevention Programs:
For CES HP programs, there are no changes made on program enrollment process.
Wrap Up

Search
Once exited from your program, a participant’s HMIS profile is still visible. You can use the Search bar to identify your participant (or any other) whether they are presently being served or not.

HMIS Navigation
Participant Tabs:

We will navigate these tabs throughout our experience with a participant. In these sections we record general information relative to our participant.

Program Tabs:

These tabs are specifically used in Program Management; starting from Enrollment (Program Entry), we record the services provided, interaction-related notes, and the information relevant to the support of the participant.

Enlightening Tips
We can use just the first four characters of the 11-character Unique Identifier to Search for a participant. To do this, type the first four characters, then add the % symbol.

E.g. XXXX%

For any additional questions or concerns, please email us at HMISSupport@LAHSA.org

Personal Notes

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