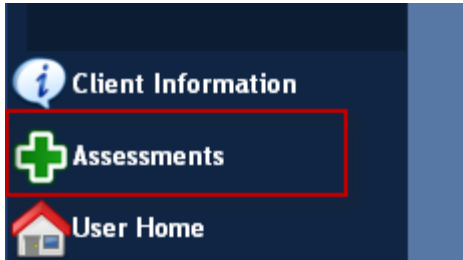
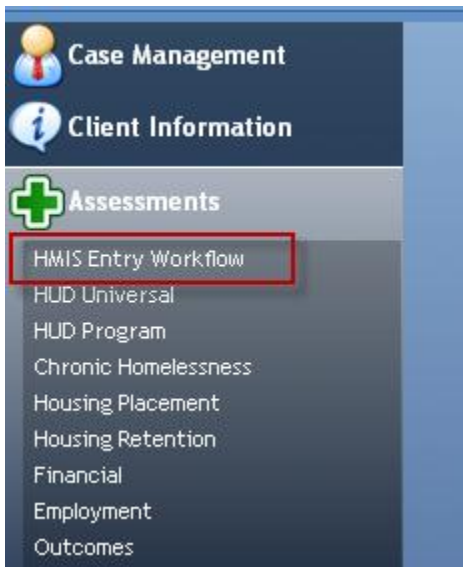


HMIS Entry Workflow Training Guide

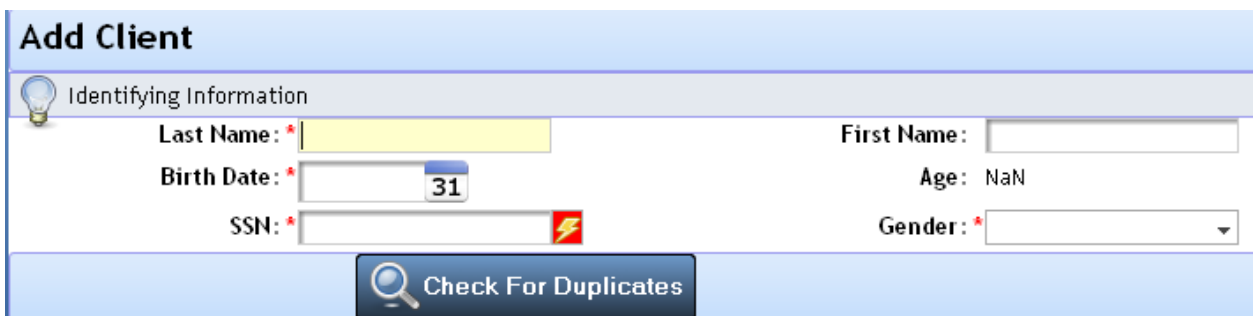
1. After logging in, then click on the Assessments menu group



2. Under Assessments, click the link, "HMIS Entry Workflow"



3. Enter a first name and last name and click "Check for Duplicates" to see if the client record exists in the HMIS.

A screenshot of the 'Add Client' form. The form has a light blue header with the title 'Add Client'. Below the header is a section titled 'Identifying Information' with a light blue background. It contains several input fields: 'Last Name: *' (with a yellow highlight), 'First Name: *', 'Birth Date: *' (with a calendar icon and the number '31'), 'Age: NaN', 'SSN: *' (with a red lightning bolt icon), and 'Gender: *' (with a dropdown arrow). At the bottom of the form is a dark blue button with a magnifying glass icon and the text 'Check For Duplicates'.

4. If you find the client record, select the record and review the demographic information to ensure that it is accurate.

5. If the client record doesn't exist in the HMIS, select "This is a new client"

The screenshot shows a form titled "Client Information" with the following fields: Last Name: * test, First Name: bubble, Birth Date: * [calendar icon] 31, Age: NaN, SSN: * [lightning bolt icon], and Gender: * [dropdown arrow]. Below the fields are two buttons: "Check For Duplicates" (with a magnifying glass icon) and "This is a new client" (with a green checkmark icon). The "This is a new client" button is highlighted with a red rectangular box. Below the buttons, the labels "SSN" and "Birth Date" are visible.

6. Under "Sharing," make sure that "Shared" is selected. This is very important! If you don't select "shared," other users can't see the record and will create new records. Only select "Not Shared" if the client refuses to sign the HMIS release.


The screenshot shows a form titled "Contact Information" with the following fields: Address: *, Zip Code: * [magnifying glass icon], State: *, and Work Phone: *. The "Sharing: *" dropdown menu is highlighted with a red rectangular box and is set to "Shared".

7. Workflow navigator: on the left you can view the remaining steps in the workflow. You can only access steps with green circles. Locked forms can't be accessed until you complete the prior steps in the workflow. The star represents the step you are currently on.

The screenshot shows the "HMIS Entry Workflow" navigator. At the top, it displays a client profile for "test ralph" with a birth date of "10/20/1943" and a unique identifier "test,ralph-1943-1". Below the profile, the workflow steps are listed: "Add Client" (green circle), "Client Families" (yellow star), "Enrollment Add/Edit" (blue padlock), "Enrollment Members" (blue padlock), "Assessment" (blue padlock), "Client Issues" (blue padlock), and "Service Spreadsheet" (blue padlock). The "Client Families" step is currently selected and highlighted with a yellow star.


8. If you are completing an intake on a family, click "Add family member." If not, click save to proceed.

Client Families			
Family Member*	Relationship*	Date Added*	Date Removed
✓ ralph	Self	4/16/2010	Present




- After clicking "Add new family." Click the look-up symbol to search for the family member's record

Family Member*	Relationship*	Date Added*
✓ ralph	Self	4/16/2010
✗ <input type="text"/>	<input type="text"/>	04/22/2010 31




- Enter the family member's name and click "Search."




Last Name:
 First Name:
 Birth Date: 31

SSN:
 Scan Card ID:



- If the record exists, select it. If not, click "Add new."
- If you click add new, enter all the demographic info as instructed in the previous steps for the head of household.
- After adding all the family members, you will be taken to the "Client Family" screen

Family Member*	Relationship*	Date Added*
✓ ralph	Self	4/16/2010
✗ test 	Step-Child <input type="text"/>	04/22/2010 31

- When you have finished adding all the family members, click save.

15. The next step is to enter the program you are enrolling the client into. Select the program and the provider and click save

Enrollment Add/Edit

Family: * testralph-1943-10-20 Program: *

Begin Date: 04/22/2010 31 End Date: 12/31/9999 31 ★

Enroll current client:

Follow up: Schedule Follow-Up

Provider: *

Important Note: The program you select will determine the subsequent forms required to complete to successfully enroll the client.

16. After selecting the program enrollment, choose the clients that you would like to enroll in the program.

Enrollment Members

Choose the family members you want to include in this enrollment from the list below.

	First Name	Last Name	Provider*	Restriction*
<input checked="" type="checkbox"/>	ralph	test	Haven for Hope	Shared
<input type="checkbox"/>	test	test		

17. The assessments required for the enrollment will be added as steps to the workflow after you select which family members you would like to enroll

HMIS Entry Workflow

- Enrollment Add/Edit
- Enrollment Members
- ★ Assessment
- test, ralph
- ★ HUD Universal Data
- Client Issues
- Service Spreadsheet

18. After completing the required assessments for the enrollment (some just require one extra form), you will need to select the “Presenting Issues” (formerly known as “Barriers”). Select a list from the category drop-down to narrow the list of issues to choose from. Click each issue the client has, and click save when finished.

Client Issues

Category: *

	Identified Date	Description	Is Chronic	Is In Treatme
<input type="checkbox"/>		Advance Directive		
<input type="checkbox"/>		Agrophobia		
<input type="checkbox"/>		AIDS		
<input type="checkbox"/>		Alcohol		
<input type="checkbox"/>		Alcohol problem or alcoholic		

19. Client Services- Select the program from the program drop-down list. The program that you will select will drive the services that appear in the spreadsheet.












Category:

Program: *

20. Select the services from the list and click save when you are finished.

	Begin Date	Service	Units*
<input type="checkbox"/>		Counseling	0.00
<input checked="" type="checkbox"/>		Legal Aid	0.00
<input type="checkbox"/>		Emergency Shelter	0.00
<input type="checkbox"/>		Obtain Government ID	0.00
<input type="checkbox"/>		Job Training	0.00
<input type="checkbox"/>		Job Readiness	0.00
<input type="checkbox"/>		Meal	0.00

21. Review of workflow: When all the steps are completed, a screen will appear informing you if all the steps have been completed.

HMIS Entry Workflow (good) is now complete.			
Status	Step Name	Completed By	Completed Date
	Add Client	shaun	4/22/2010 8:14:00 PM
	Client Families	shaun	4/22/2010 8:14:00 PM
	Enrollment Add/Edit	shaun	4/22/2010 8:14:00 PM
	Enrollment Members	shaun	4/22/2010 8:15:00 PM
	Assessment	shaun	4/22/2010 8:15:00 PM
	test, Jill		
	HUD Universal Data	shaun	4/22/2010 8:14:35 PM
	HUD Program Assessment (Input)	shaun	4/22/2010 8:14:43 PM
	Chronic Homelessness (Input)	shaun	4/22/2010 8:14:54 PM
	Client Issues	shaun	4/22/2010 8:15:00 PM
	Service Spreadsheet (2)	shaun	4/22/2010 8:19:00 PM