NC's Balance of State Homeless Management Information System (HMIS)
Carolina Homeless Information Network
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HMIS Training Guide-End-Users
Project Homeless Connect

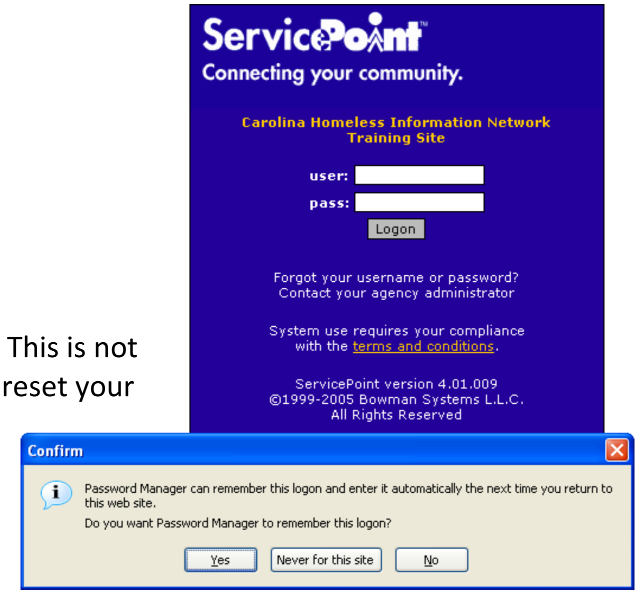
Use this training guide when you are entering data AFTER the date of the Project Homeless Connect event in your community.

CHIN HMIS Training Guide

Logging In

Step 1 – Log into training site
Enter your user name
and your one-time use password

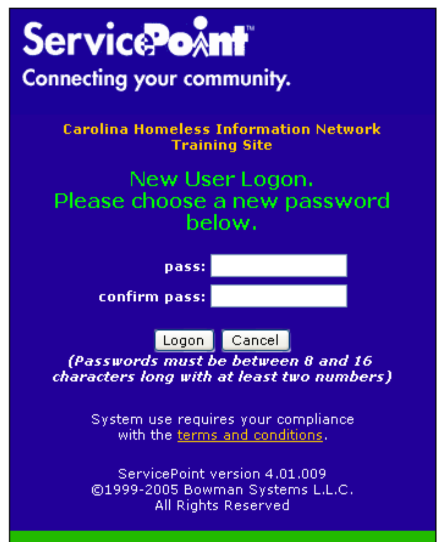
NEVER allow your password to be "remembered". This is not secure and will cause problems when you have to reset your password.



Password Expiration

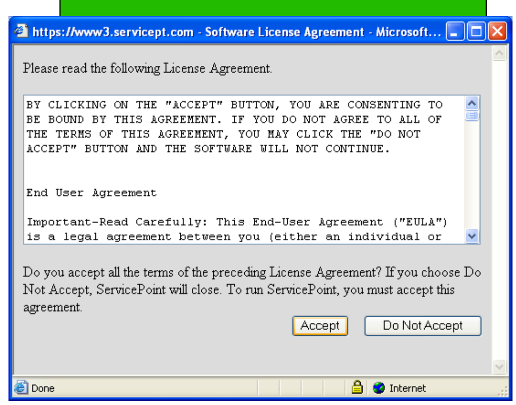
When you see this screen it means that your password has expired.
Create a new one and enter it in BOTH fields.

Your password will expire every 45 days.
The first time you do this you will see the user license agreement. Review it and click Accept.



Password

Passwords must:
-have at least 8 characters
-have at least 2 numbers
-have at least 1 capital letter
-not be your name, your agency's name, or a common work spelled forward or backwards



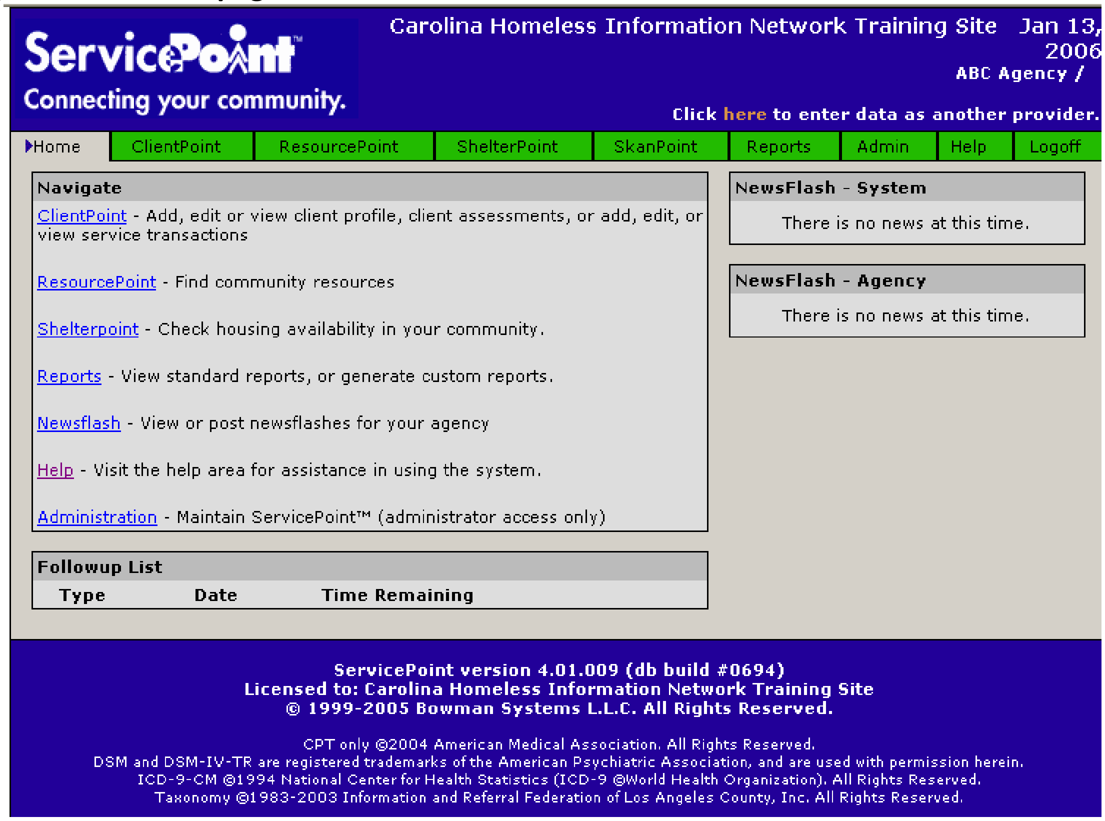
In ServicePoint you will have to change your password every 45 days.
You cannot go back and forth between 2 passwords but you can cycle through 3 passwords.
ServicePoint will lock you out of the system if you try more than 3 combinations of username and password without getting your's correct.
Contact CHIN to have your password reset once you've been locked out of the system.

1st password:
2nd password:

3rd password:

4th password: same as 1st password

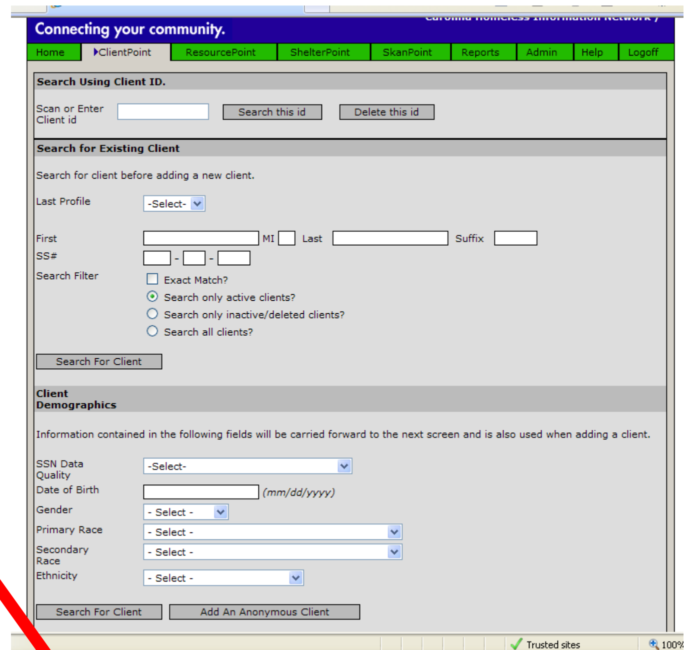
Navigation and Homepage Content



ClientPoint – Searching for/Adding a client

This is where you begin using the HMIS to collect client level data.
You may find a client's file using the Add/Find button or by entering the client's system generate id number in the Scan or Enter Client id field.

TO GET TO THIS PAGE – click on the ClientPoint tab.

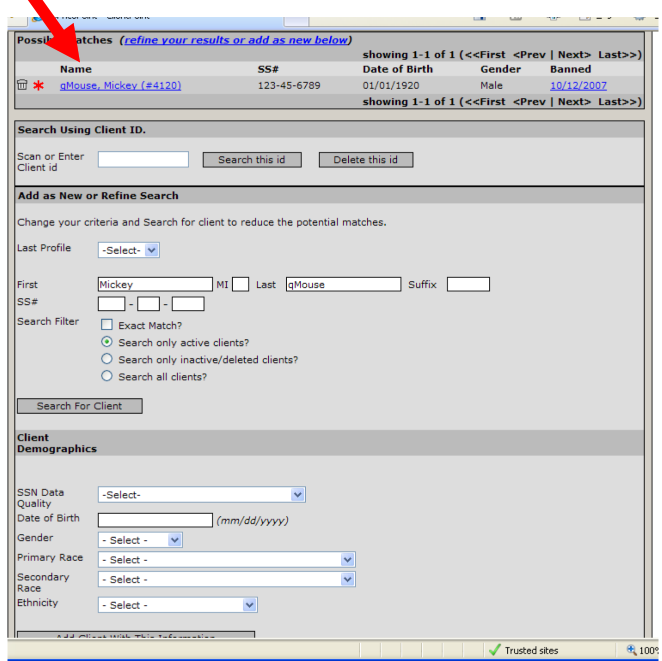


Step 1 – Type in the client's last name. *Be careful to spell the names correctly.*

Step 2 – Look at the TOP of the screen for Possible Matches. *ALWAYS LOOK UP and click on the client's name whenever possible.*

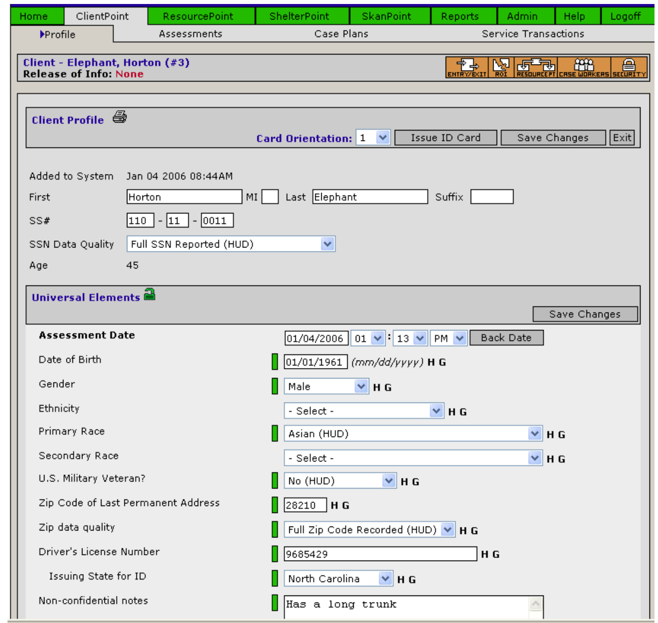
Step 3 – If there are no Possible Matches click on Add Client With This Information to create a new client file.

NOTE: Do NOT use the Add As Anonymous Client button.



Profile – This screen may be different for each agency.

TO GET TO THIS SCREEN – It will come up whenever you click on the client's name from the Add/Find screen, when you click on Add client with this information, OR when you click on the Profile tab within a client's file.

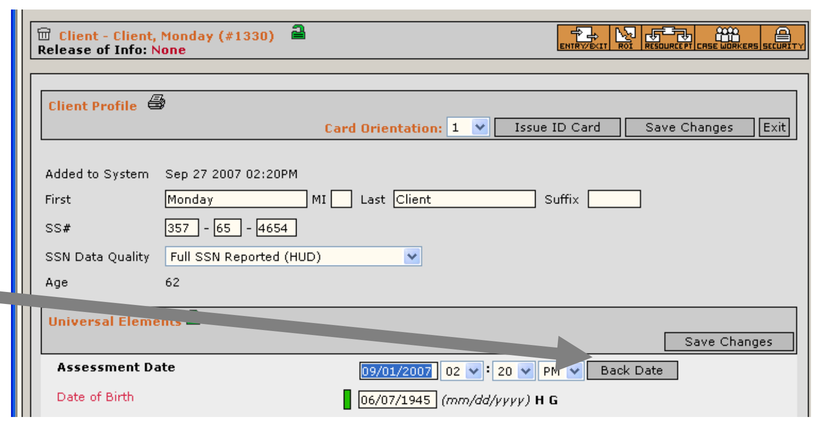


Notice that the name, and any other information you entered in the Add/Find screen carried over to the Profile.

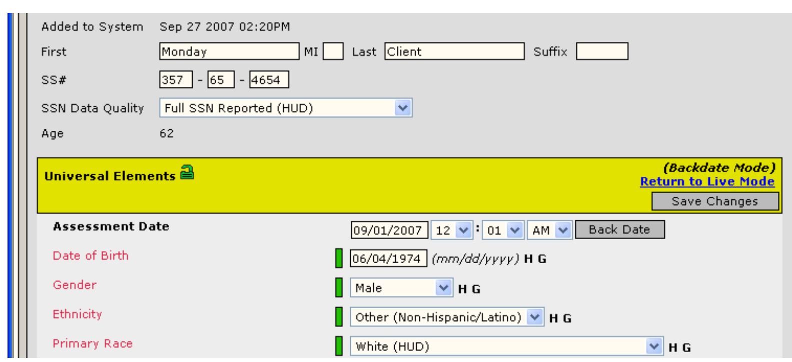
If you are adding to an existing file, some of the information you saw in the Possible Matches might not be visible on the Profile. This is because the client did not give another agency permission to share the file. Be VERY CAREFUL entering the date of birth, ethnicity, and gender. If you make a typo it will affect other agencies.

Step 1 – Answer the SSN Data Quality question

Step 2 – In the Assessment Date box, type the date of your Project Homeless Connect event and click on Back Date. Click OK when it asks you if you want to enter historical data. Sections of the screen will turn yellow.



NOTE: You should do this on the FIRST client after you log in. You will stay in Back Date mode until you click on Return to Live Mode.

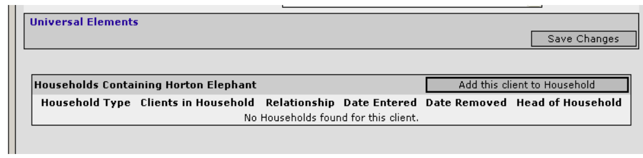


Step 3 – Enter the information on the Profile screen

Step 4 - Creating Households (see next page)

Creating Households

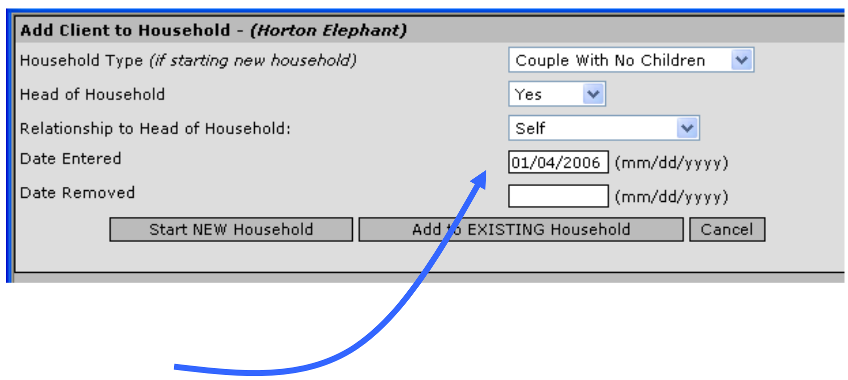
You should create a household when a client is living with or sharing custody of their dependents. You do not need to create a household for a SINGLE individual.



TO GET TO THIS SCREEN – scroll to the bottom of the Profile page and click on Add this client to Household.

Step 1 - From the bottom of the Profile screen Click on Add This Client to Household

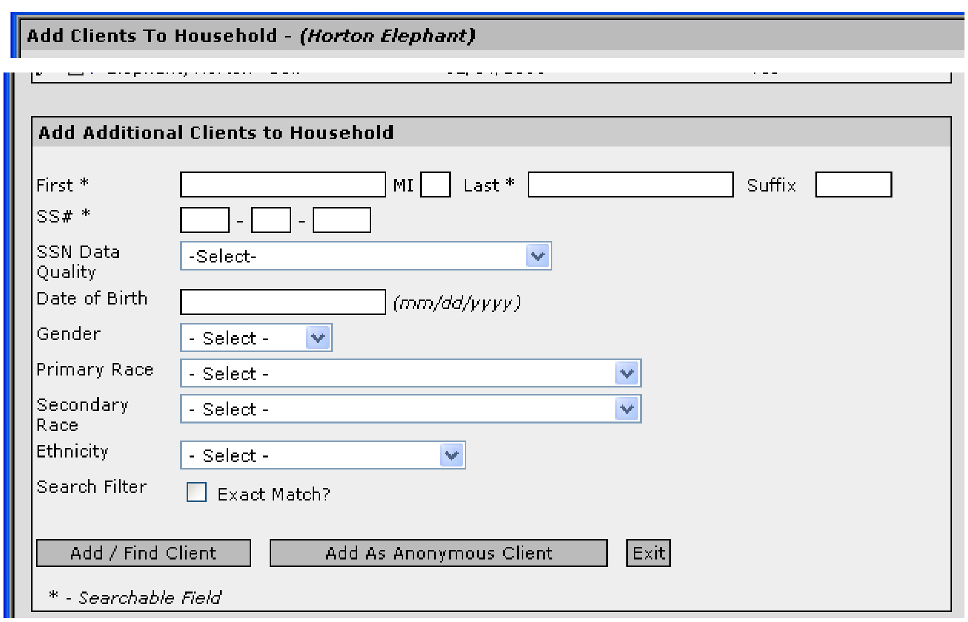
Step 2 - Select the type of household, if the client is the head of the household, and the client's relationship to the household.

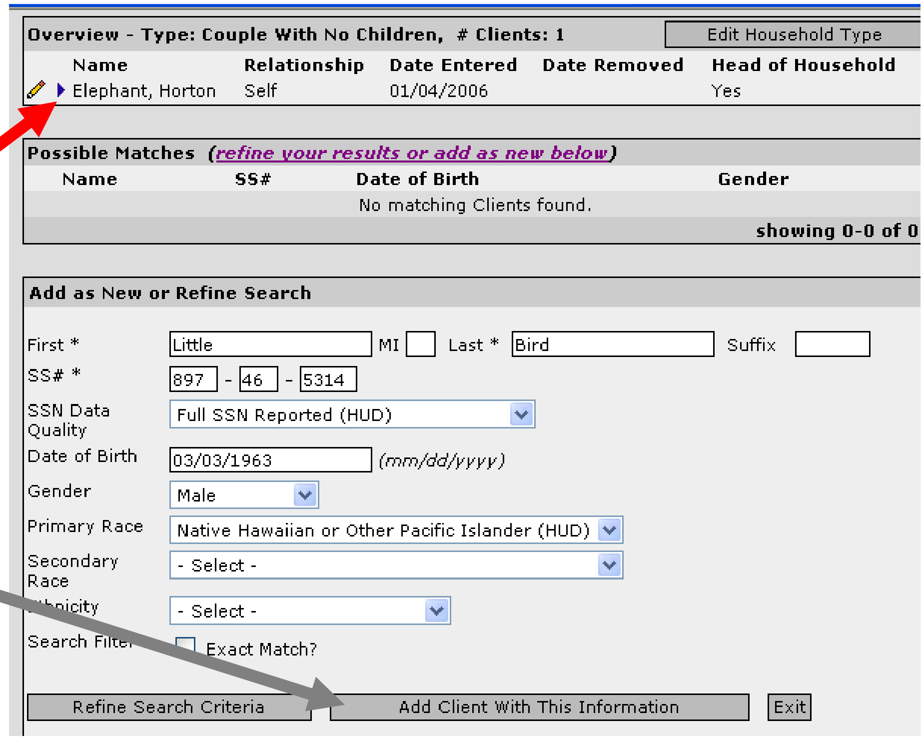


BACK DATE NOTE – Make sure the Date Entered matches the date of the PHC event.

Step 3 – Click Start NEW Household (DO NOT CLICK Add to Existing Household)

Step 4 – Search for the client you want to add to the household by entering their name and clicking on Add/Find





Step 5 – Select the client from the Possible Matches

or

Enter the additional demographic information and click Add (the new) Client with This Information

Step 6 – Select whether or not the added client is the head of household, select the added client's relationship to the head of household, and click Add Household Member

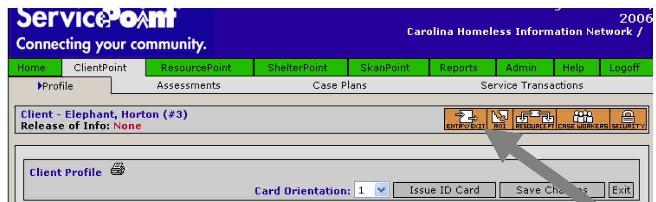
Step 7 – Repeat for each household member THEN Close the window

Client Consent – ROI

Make sure you have the client's consent to be put into the system before you start entering their information in the HMIS.

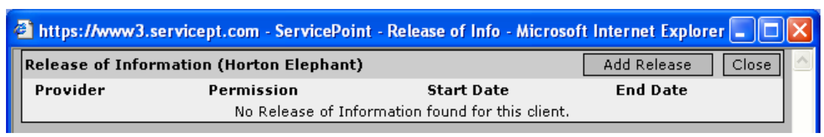
If a client circles NO to #1 on the consent DO NOT ENTER THEM INTO THE HMIS.
If a client circles NO to #2 on the consent CONTACT CHIN
If a client circles NO to #3 on the consent select NO in Step 4 below.

Complete the client consent (ROI) step after you have entered all household members.



Step 1 – TO GET TO THIS SCREEN - From the top of the main client's Profile page, click on the orange ROI button.

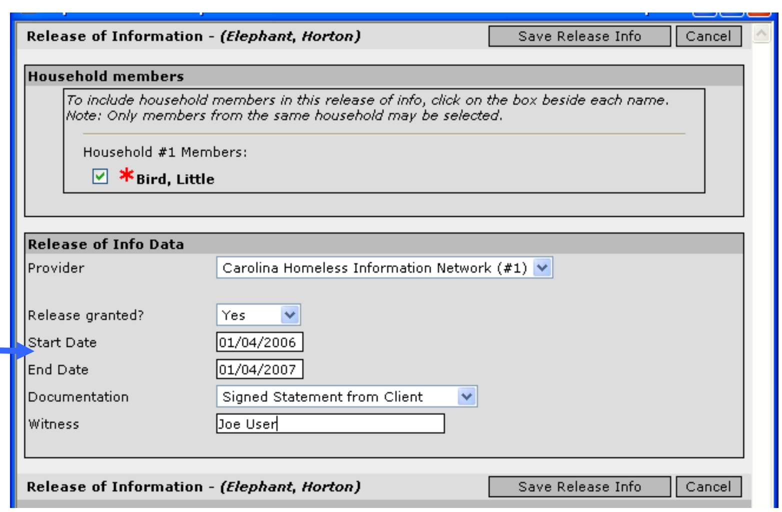
Step 2 – Click on Add Release



Step 3 – Check the box next to the household member's names IF they have the same release parameters. If they have different release parameters, do not click the boxed next to their name and remember to go into their files to set up their consents later.

Step 4 – Check whether or not the release has been granted, enter the start AND end dates, enter the documentation and the witness

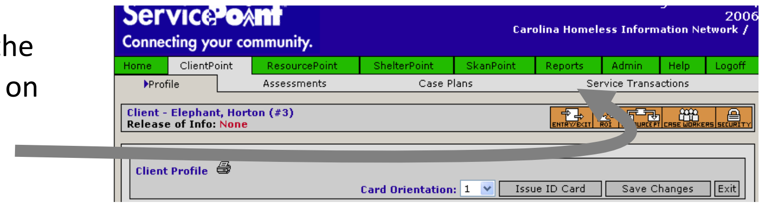
BACK DATE NOTE – Make sure the Start Date matches the date of the PHC event.



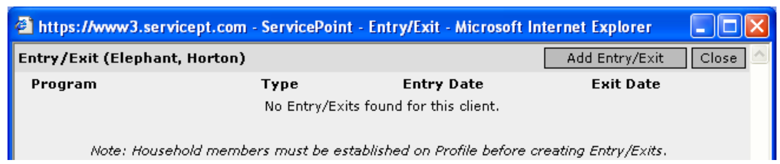
Step 5 – Click Save Release Info and Close the window

Recording participation in the PHC event – ENTRY / EXIT WORKSHEETS

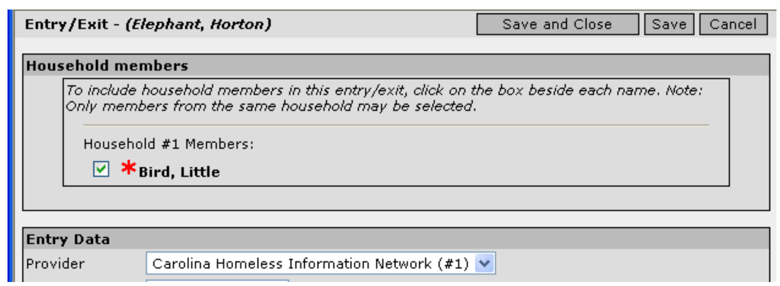
Step 1 – TO GET TO THIS SCREEN - From the top of the main client's Profile page, click on the orange Entry/Exit button.



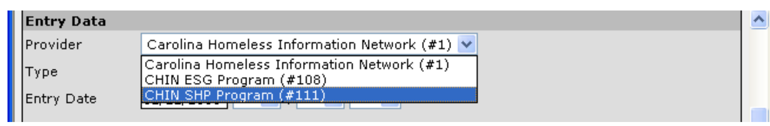
Step 2 – Click on Add Entry/ Exit



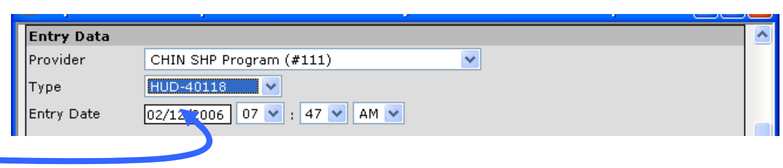
Step 3 – Check the box next to the name of additional household members, if any, who are being enrolled in the same program.



Step 4 – Select the type of program (**Standard for Project Homeless Connect**) and enter the date of the PHC event



BACK DATE NOTE – Make sure the Entry Date matches the date of the PHC event.



Step 5 – Enter the answers to the questions.

Under Resources Obtained, answer Yes if the client obtained the resource, answer No if it is an unmet need, skip the question if it isn't a need of the client.

Under Housing, select the type of housing/shelter the client received.

Step 6 – Click Save and Close the window

Remember that you will need to fill out the Exit data to complete the process and answer the survey questions.

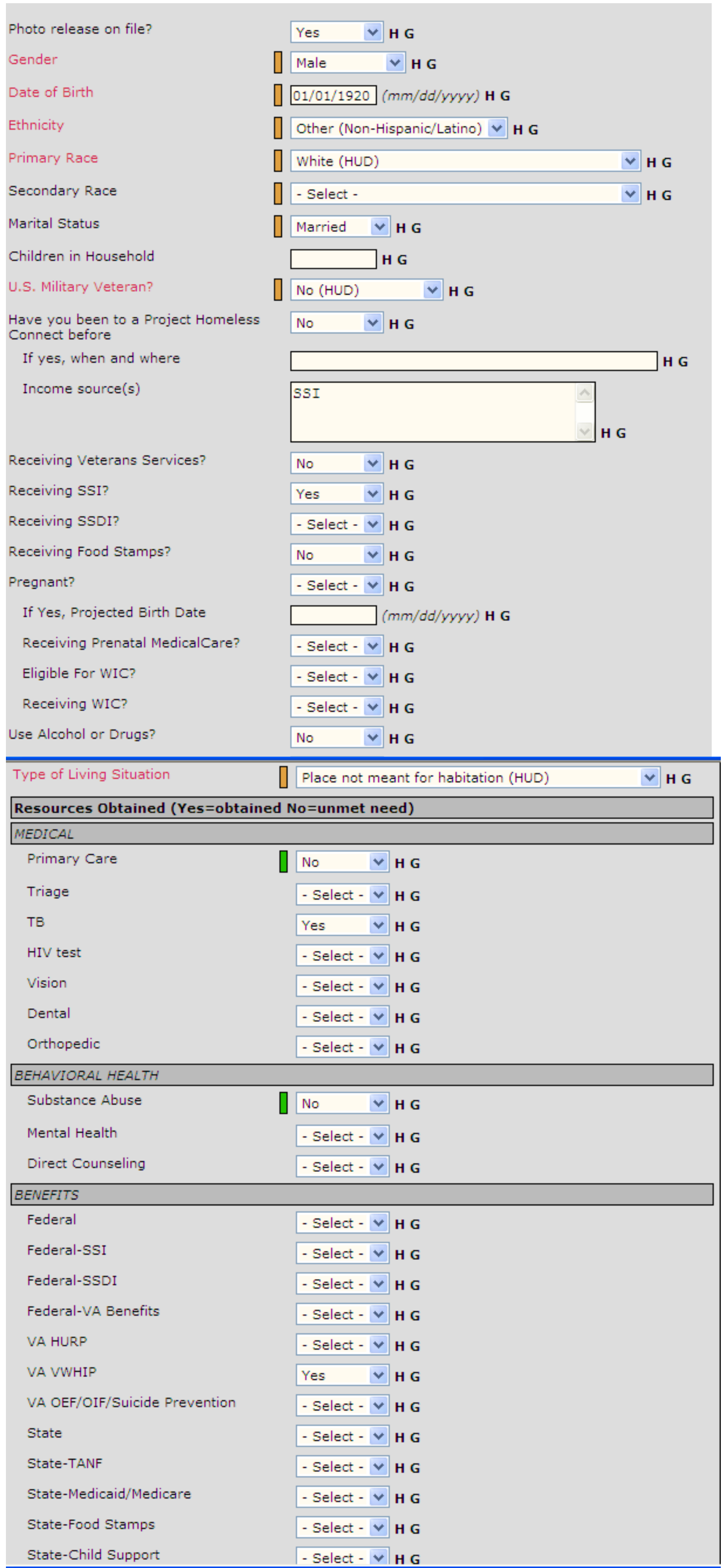


Photo release on file?	Yes H G
Gender	Male H G
Date of Birth	01/01/1920 (mm/dd/yyyy) H G
Ethnicity	Other (Non-Hispanic/Latino) H G
Primary Race	White (HUD) H G
Secondary Race	- Select - H G
Marital Status	Married H G
Children in Household	H G
U.S. Military Veteran?	No (HUD) H G
Have you been to a Project Homeless Connect before	No H G
If yes, when and where	H G
Income source(s)	SSI H G
Receiving Veterans Services?	No H G
Receiving SSI?	Yes H G
Receiving SSDI?	- Select - H G
Receiving Food Stamps?	No H G
Pregnant?	- Select - H G
If Yes, Projected Birth Date	(mm/dd/yyyy) H G
Receiving Prenatal MedicalCare?	- Select - H G
Eligible For WIC?	- Select - H G
Receiving WIC?	- Select - H G
Use Alcohol or Drugs?	No H G
Type of Living Situation	Place not meant for habitation (HUD) H G
Resources Obtained (Yes=obtained No=unmet need)	
MEDICAL	
Primary Care	No H G
Triage	- Select - H G
TB	Yes H G
HIV test	- Select - H G
Vision	- Select - H G
Dental	- Select - H G
Orthopedic	- Select - H G
BEHAVIORAL HEALTH	
Substance Abuse	No H G
Mental Health	- Select - H G
Direct Counseling	- Select - H G
BENEFITS	
Federal	- Select - H G
Federal-SSI	- Select - H G
Federal-SSDI	- Select - H G
Federal-VA Benefits	- Select - H G
VA HURP	- Select - H G
VA VWHIP	Yes H G
VA OEF/OIF/Suicide Prevention	- Select - H G
State	- Select - H G
State-TANF	- Select - H G
State-Medicaid/Medicare	- Select - H G
State-Food Stamps	- Select - H G
State-Child Support	- Select - H G

Exiting your client from a program

Step 1 Pull up the client's file by searching for it through ClientPoint

Step 2 TO GET TO THIS SCREEN - Click on the orange Entry/Exit button from the top of the client's file.

Step 3 Click on the pencil under Exit Date

Step 4 Enter the exit data

Step 5 Click Save and Close

BACK DATE NOTE – Make sure the Exit Date matches the date of the PHC event