

# Non-HMIS Training

Version 2

How to Reassess Existing Clients  
Without a Barriers Assessment

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WI Balance of State CoC

November 2023

- After clicking on the client ID, it will bring up the Update Client screen.
- The Barriers will show that an assessment has not been completed yet.

## Update Client

Entered by/assigned to: [REDACTED]

External ID\* [REDACTED]

D.O.B. mm/dd/yyyy [REDACTED]

Gender\* [REDACTED]

Age\* [REDACTED]

Race / Ethnicity [REDACTED]

Veteran status [REDACTED]

### Barriers

Date & Time

No barriers assessment yet. [Add](#)

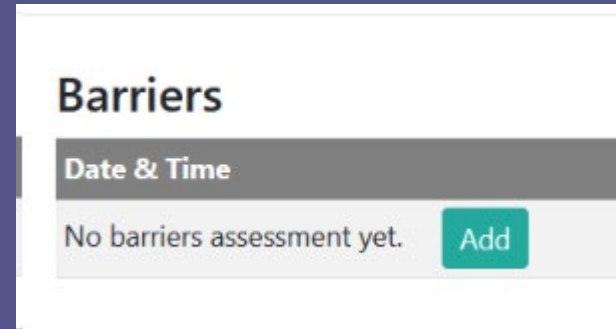
[Enrollments](#) [Add](#)

List - Date & Time

# In order for a Barriers to save correctly, you must follow these steps in order

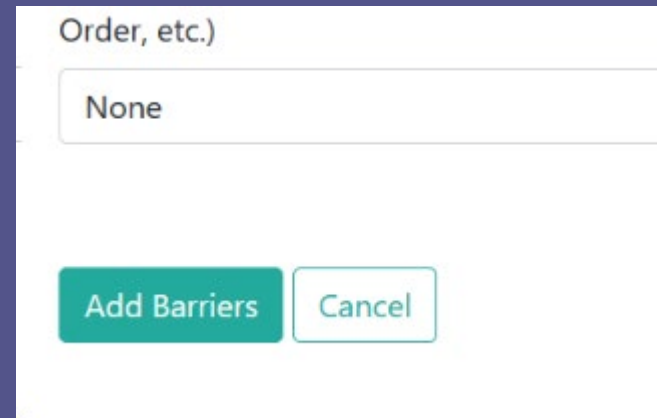
Step 1:

- Click on 'Add'



Step 2:

- Answer all questions on the Barriers Assessment
- Click on 'Add Barriers'



After you save the Barriers, YOU ARE NOT DONE YET

You must go into an enrollment, so the Barriers attaches to the enrollments

Step 3:

- Click on the most current enrollment, which will be the first one listed.

The screenshot displays a user interface with two main sections. The top section is titled 'Barriers' and contains a 'Date & Time' header with a single entry: 'Jan. 3, 2024, 4:16 p.m.'. Below this is the 'Enrollments' section, which has a red rectangular box around its title and a green 'Add' button. Underneath the 'Enrollments' title is a 'List - Date & Time' header, followed by three entries: 'Rock Walworth - Jan. 3, 2024, 4:16 p.m.', 'Dairyland - Jan. 3, 2024, 4:16 p.m.', and 'Coulee - Jan. 3, 2024, 4:16 p.m.'. A red arrow points to the first enrollment entry, 'Rock Walworth - Jan. 3, 2024, 4:16 p.m.'.

After you click on the enrollment, it will bring you to the Update Enrollment screen.

You now need to update Household, Current Living Situation, Domestic Violence and Assessment

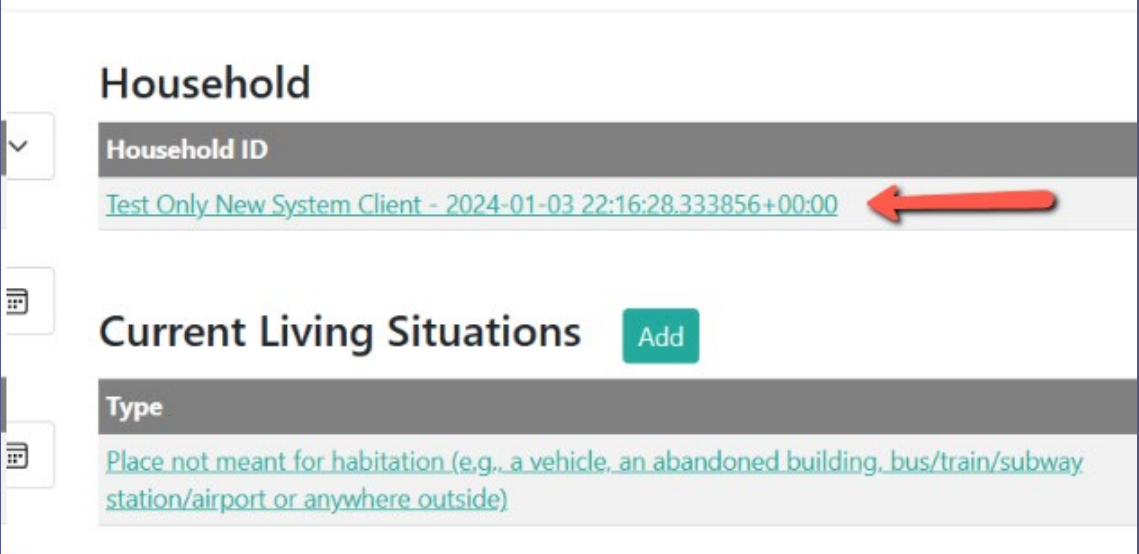
### Update Enrollment

Referring provider*	Household	<b>Household</b>
<input type="text" value="BOS"/>	<input type="text" value="Test Only New System Client - 2024-01-03 22:16..."/>	<b>Household ID</b>
Referring provider contact*	Project start date	<a href="#">Test Only New System Client - 2024-01-03 22:16:28.333856+00:</a>
<input type="text" value="Holly Sieren"/>	<input type="text" value="mm/dd/yyyy"/>	<b>Current Living Situations</b> <span>Add</span>
Referring provider email*	Project end date	<b>Type</b>
<input type="text" value="holly.sieren@wibos.org"/>	<input type="text" value="mm/dd/yyyy"/>	<a href="#">Place not meant for habitation (e.g., a vehicle, an abandoned bus station/airport or anywhere outside)</a>
Do you have a chronic disabling condition?	<input type="checkbox"/> FUP Eligible?	<b>Domestic Violence</b> <span>Add</span>
<input type="text" value="Yes"/>		<b>Survivor - Currently Fleeing</b>
If yes, how many chronic disabling conditions do you have?		<a href="#">No - No</a>
<input type="text" value="2"/>		<b>Assessment</b>
Do you have non-chronic medical needs?		<b>Type - Level</b>
<input type="text" value="Yes"/>		

# Update Household

Step 4:

- To update Household, click on the link



The screenshot displays a web interface with a sidebar on the left containing three menu items, each with a calendar icon. The main content area is titled "Household" and features a dropdown menu with a downward arrow. Below the dropdown, the "Household ID" is shown as a teal link: "Test Only New System Client - 2024-01-03 22:16:28.333856+00:00". A red arrow points to this link. Below the Household ID section, there is a section titled "Current Living Situations" with a teal "Add" button. Underneath, the "Type" is listed as a teal link: "Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)".

# Update Household (continued)

Step 5:

- To add a Household member, click on 'Add'
- To delete a Household member, click on 'delete' on the line where that member is listed
- Once you're done updating, click on 'Update Household'

Note: If you do not need to change any information, you still need to click on 'Update Household'

## Update Household

If client is not the head of household, choose head of household here.

Test Only New System Client - 2024-01-03 22:16:... ▾

Number of Children (<18), not counting enrollee  
0

Number of Youth (18-24), not counting enrollee  
0

Number of Adults (25+), not counting enrollee  
0

**Update Household** **Cancel**

### Members (aside from client)

**Add** ←

Relationship	Gender	Age	Actions
Head of household's spouse or partner	Male	55 and over	delete
Head of household's child	Female	Under 4	delete
Head of household's child	Male	Under 18	delete

# Update Current Living Situation

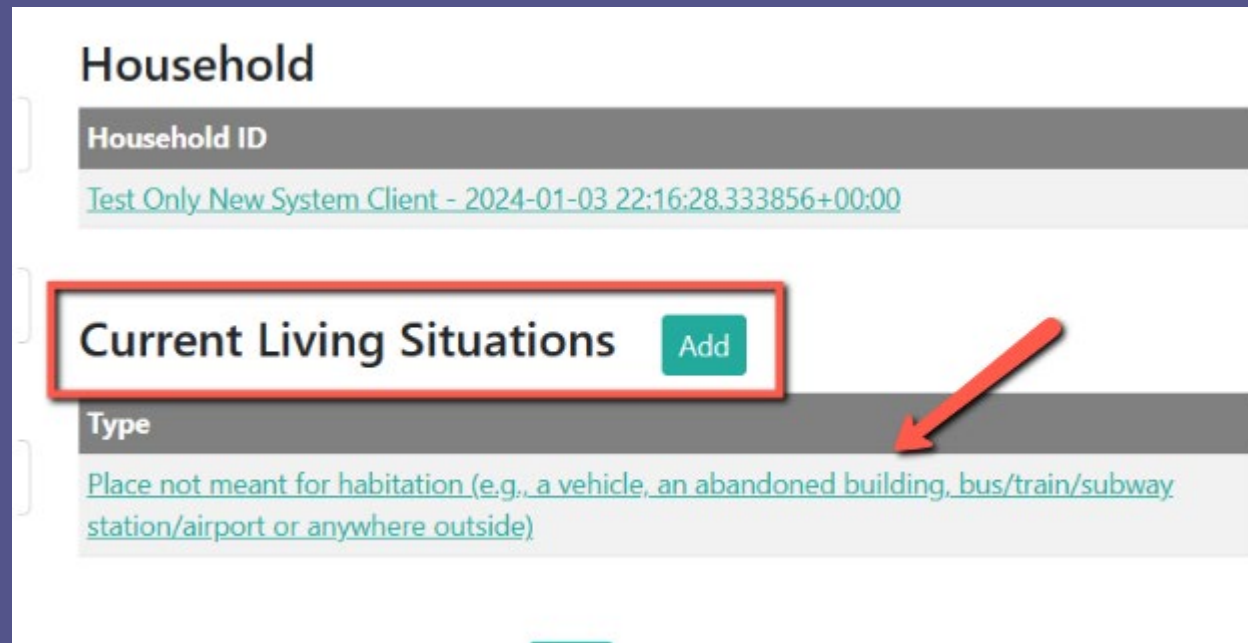
Step 6: To update Current Living Situation, click on the link

**Household**

**Household ID**  
[Test Only New System Client - 2024-01-03 22:16:28.333856+00:00](#)

**Current Living Situations** [Add](#)

**Type**  
[Place not meant for habitation \(e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside\)](#)

A screenshot of a web interface for managing household information. The page is titled "Household" and displays a "Household ID" field with a value "Test Only New System Client - 2024-01-03 22:16:28.333856+00:00". Below this, there is a section for "Current Living Situations" which includes an "Add" button. A red box highlights the "Current Living Situations" section. Below the "Add" button, there is a "Type" field with a link to "Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)". A red arrow points to this link.



# Update Current Living Situation (continued)

Step 7:

- If the Current Living situation has changed, update all appropriate information
- Click on 'Update Current Living Situation'

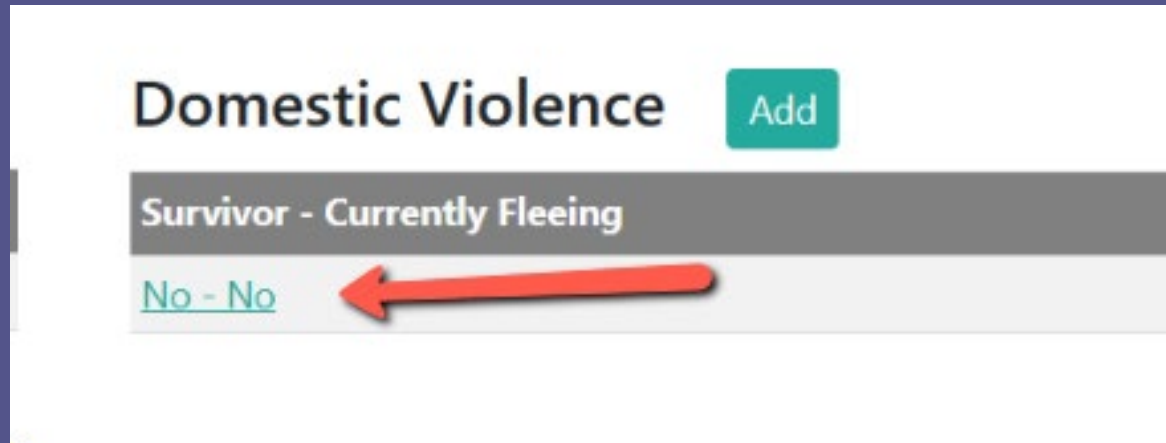
NOTE: If nothing has change, you still need to click on 'Update Current Living Situation'

### Update Current Living Situation

Type of residence	Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway static) ▾	Approximate date homelessness started	10/01/2023
Location details		Length of stay in current living situation	90 days or more, but less than one year
Is client going to have to leave their current living situation within 14 days?	No ▾	Length of current episode of homelessness in months; cannot exceed 36 months	3
Does individual or family have resources or support networks to obtain other permanent housing?	No ▾	Total number of months homeless on the street, in ES, or SH in the past three years	3
Has a subsequent residence been identified?	No ▾	(Regardless of where they stayed last night) Number of times the client has been on the ES, or SH in the past three years including today	One time
<b>Update Current Living Situation</b> Cancel			

# Update Domestic Violence

Step 8: To update Domestic Violence, click on the link



# Update Domestic Violence (continued)

Step 9:

- If any information has changed, update the appropriate fields
- Click in 'Update Domestic Violence'

NOTE: If nothing has changed, you still need to click on 'Update Domestic Violence'

## Update Domestic Violence

Are you a survivor of domestic violence, sexual assault, and /or human trafficking?

No

If yes, when did the last experience occur?

mm/dd/yyyy

Are you currently fleeing domestic violence, sexual assault, and/or human trafficking?

No

If yes, what is the approximate date that you began to make plans to look for housing to leave your current abusive situation?

mm/dd/yyyy

How many times have you left or attempted to leave your abusive situation in the last 3 years?

None

**Update Domestic Violence** Cancel

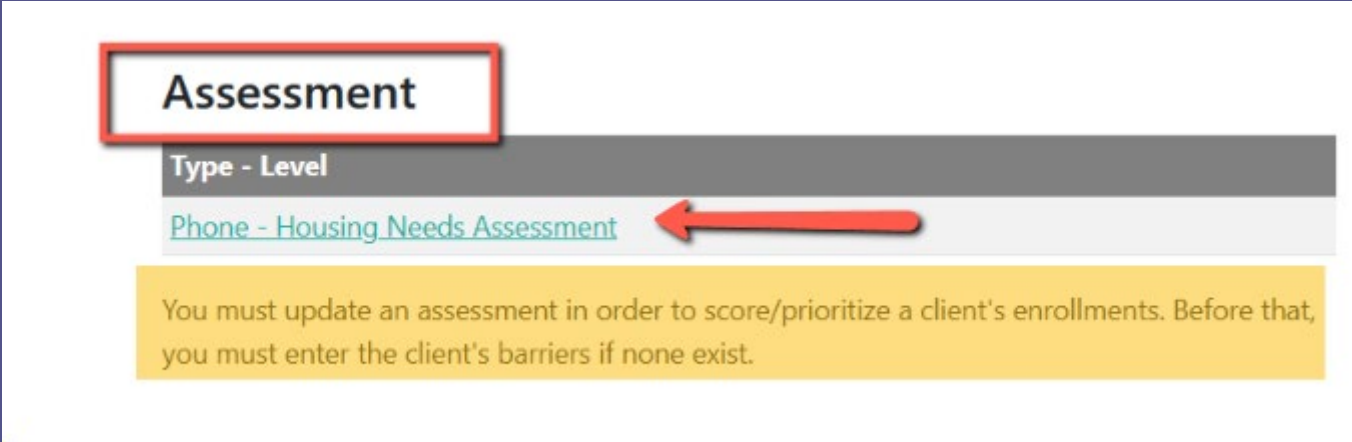
# Update Assessment

This is the most important step to ensure the Barriers Assessment attaches to the enrollment and saves correctly

- If the Barriers has not been entered, one must be entered. That is your first step.
- The Assessment is used to pull all information into each enrollment. It's what makes a client's information prioritize correctly.
- If the Assessment is not done, the client will not prioritize correctly and the Barrier will show as not being done yet.
- You **MUST UPDATE THE ASSESSMENT** in order for the Barriers score to prioritize in the client's file
- This is your last step in updated the client's entire file

# Update Assessment (continued)

Step 10: To update the Assessment, click on the link



The screenshot displays a table with the following structure:

Assessment
Type - Level
<a href="#">Phone - Housing Needs Assessment</a>

A red arrow points to the link "Phone - Housing Needs Assessment". Below the table, a yellow box contains the text: "You must update an assessment in order to score/prioritize a client's enrollments. Before that, you must enter the client's barriers if none exist."

# Update Assessment (continued)

Step 11:

➤ Click on 'Update Assessment'

NOTE: Do NOT change the 'Date assessed' date. That must always stay as the original intake date.

## Update Assessment

Assessment type\* Date assessed

Phone 01/03/2024

Assessment level\*

Housing Needs Assessment

**Update Assessment** Cancel

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# That's it! You're all done!

The client's Barriers is now pulled into their enrollment and it will show as being completed and prioritize correctly.

NOTE: You only need to follow the steps for one enrollment. You do not need to go into each individual enrollment to complete the steps again. Updating one enrollment will automatically update all enrollments.

Please don't hesitate to reach out to me with any questions!

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