Non-HMIS Training

Version 2

How to Reassess Existing Clients Without a Barriers Assessment

WI Balance of State CoC

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➤ 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.

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

Step 1:

➢ Click on 'Add'

Barriers

Date & Time

No barriers assessment yet. Add
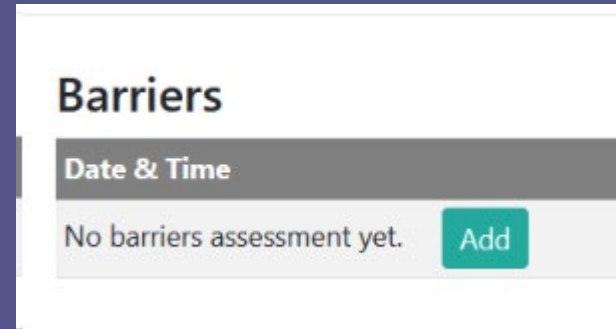
Step 2:

➢ Answer all questions on the
   Barriers Assessment

➢ Click on 'Add Barriers'

Order, etc.)

None

Add Barriers   Cancel
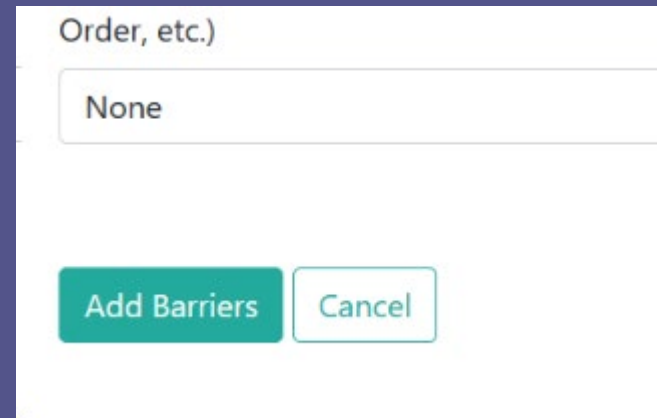
After you save the Barriers, <u>YOU ARE NOT DONE YET</u>

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.

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

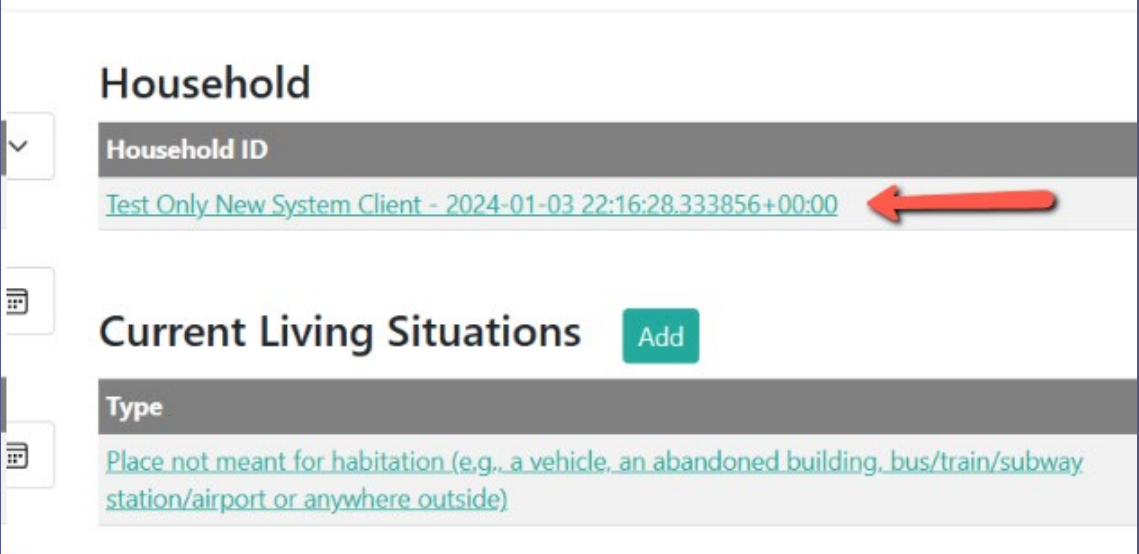You now need to update Household, Current Living Situation, Domestic Violence and Assessment

Update Household

Step 4:

➤ To update Household, click on the link

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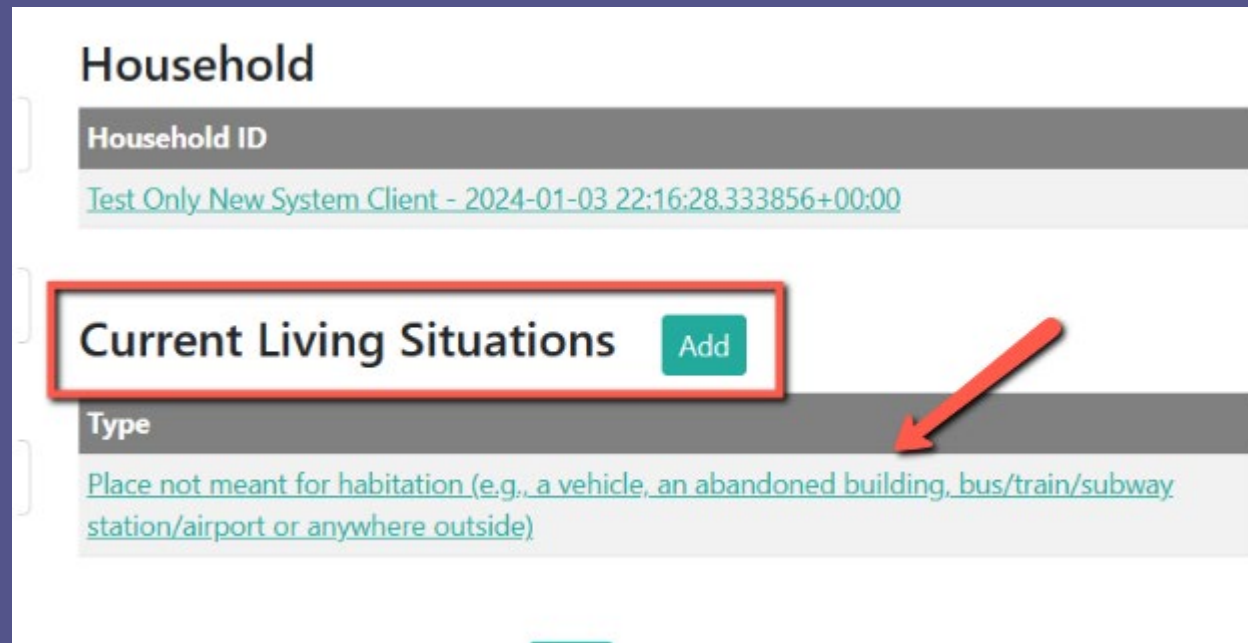
Step 6: To update Current Living Situation, click on the link

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 Domestic Violence

Step 8: To update Domestic Violence, click on the link
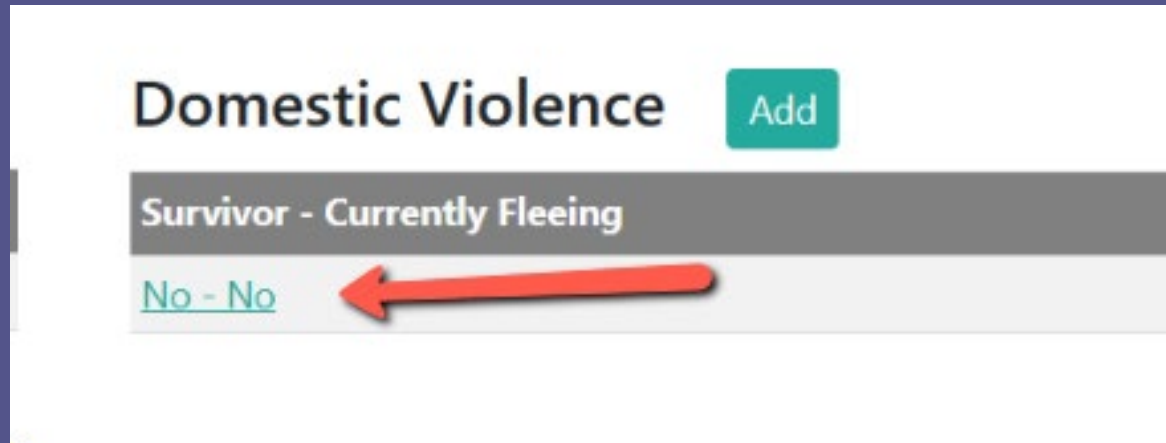
Update Domestic Violence (continued)

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'
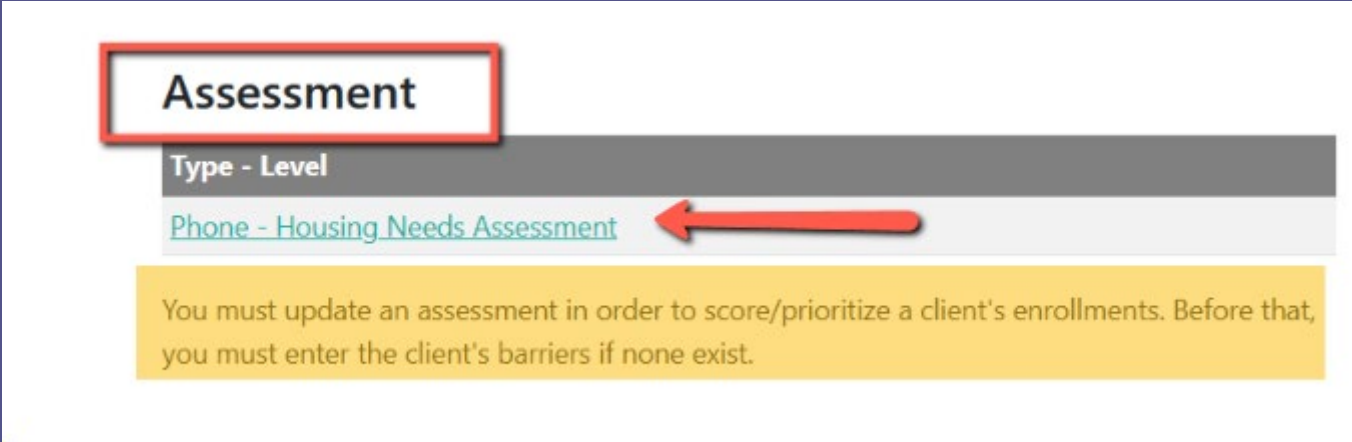
Update Assessment

<u>This is the most important step</u> 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 clien'ts 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

Update Assessment (continued)

Step 11:
➢ Click on 'Update Assessment'

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

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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