Non-HMIS Training

Version 2

How to View, Edit & Exit a Client

WI Balance of State CoC

November 2023

Viewing or Updating a Client

Clicking a client's External ID in your Clients list will allow you to view or update the details for that particular client. You can also see a list of associated Enrollments and Additional Notes.

➢ All the clients you referred will show on the initial screen. You will not be able to see any other clients in the system (the exception is the List Holder, who can see every client in their local homeless coalition).

➢ If you want to see only your active referrals, check the box next to 'Hide exited enrollments.' If you want to see all your referrals, including ones that have been exited, uncheck the box.

➢ If you want to search for a client by their Client ID, use the search box on the top right of the screen.
  • The search box is case-sensitive.

Your Clients Add Client   ☐ Hide exited enrollments   Search Clients   Search

Update Client Screen

After clicking on the client ID, it will bring up the initial screen to view or edit your client's information.

·

Update Client
Entered by/assigned to: Holly Sieren (hollysieren)

External ID*	D.O.B.
Test Only New System Client	mm/dd/yyyy

Gender*	Age*
Female	25-55

Race / Ethnicity	Veteran status
White	No

Initial notes

Test client only - added by Holly Sieren

Barriers

Date & Time
Jan. 3, 2024, 4:16 p.m.

Enrollments Add

List - Date & Time
Rock Walworth - Jan. 3, 2024, 4:16 p.m.
Dairyland - Jan. 3, 2024, 4:16 p.m.
Coulee - Jan. 3, 2024, 4:16 p.m.

Additional Notes Add

Type	Note
Follow-up	Test Note

Barriers Assessment

View or Update a Client's Barriers Assessment

➢ To view or update the Barriers, click

on the date/time listed under Barriers.

Barriers

Date & Time
Jan. 3, 2024, 4:16 p.m.

Enrollments Add

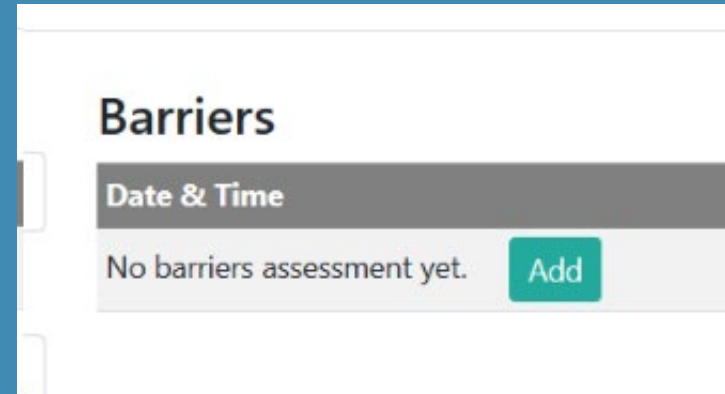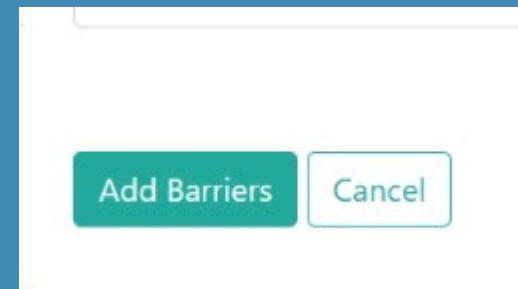| List - Date & Time |
| --- |
| Rock Walworth - Jan. 3, 2024, 4:16 p.m. |
| Dairyland - Jan. 3, 2024, 4:16 p.m. |
| Coulee - Jan. 3, 2024, 4:16 p.m. |

To add a Barriers to a current client

If the Barriers has not been completed for a current client, you must add one or the client will not prioritize.

- Click on Add

- Fill out all fields in the Barriers

- Click 'Add Barriers' to save it

You are NOT done yet

Adding Barriers to an existing client (continued)

After you save the Barriers, you must complete the following steps in order for it to save properly.

- ✓ It will take you back to the Client screen

- ✓ Click on the most recently added enrollment

- ✓ Update household and add household members if needed

- ✓ Update DV record and Current Living Situation

- ✓ Click on the link under 'Assessment'

- ✓ Fill out all fields

- ✓ Click on 'Save Assessment'

More details on this process are on the upcoming slides.

Enrollment Management

To View Enrollment Information

To view or update an enrollment, click on the name of the coalition you'd like to view or edit, and it will bring up the client's enrollment information. If they are enrolled in multiple coalition's, you will see the full list.

Adding Additional Enrollments to an Existing Client

Adding an additional enrollment is a very similar process to adding a client, but with one exception: the client details are not entered again. There is one thing to be especially mindful of, and that pertains to choosing the household for which the additional enrollment is associated.

Adding Additional Enrollments to an Existing Client (continued)

To add an additional enrollment (i.e., enter a client onto another list for the purposes of prioritization), click the 'Add' button next to the Enrollments list header in the right column of a Client's detail page. Then fill out the Enrollment Details on the next screen. Click 'Add Enrollment' to save.

Notes

- ✓ Notes are <u>required</u> to be added after each client contact or attempted contact.
- ✓ You must add the date to each note.
- ✓ Follow-ups must be done every 30 days, at minimum.
- ✓ Notes cannot have any identifiable information (example of acceptable notes: "unable to contact client" or "still looking for housing.")

Adding a Note

To add an additional note to a client, click the 'Add' button next to the Additional Notes list header in the right column of a Client's detail page. Similar to the Initial Notes field of the Client details, do not put personally identifiable information in the Initial Notes field (no names, no email addresses, no phone numbers, etc.).

Update Client
Entered by/assigned to: Holly Sieren (hollysieren)

External ID*

Test Only New System Client

D.O.B.

mm/dd/yyyy

Gender*

Female

Age*

25-55

Race / Ethnicity

White

Veteran status

No

Initial notes

Test client only - added by Holly Sieren

Barriers

Date & Time
Jan. 3, 2024, 4:16 p.m.

Enrollments [Add]

List - Date & Time
Rock Walworth - Jan. 3, 2024, 4:16 p.m.
Dairyland - Jan. 3, 2024, 4:16 p.m.
Coulee - Jan. 3, 2024, 4:16 p.m.

Additional Notes [Add]

Type	Note
Follow-up	Test Note

View or Update a Note

➢ To view or update a note, click on it in the list within the right column of a client's detail screen.

Household Management

Households should be unique among clients. A household will automatically be created for a client on first entry and assigned to all enrollments. On subsequent enrollments, the previously created household will be associated automatically.

Viewing or Updating a Household

Click the household link in the right column of an enrollments detail screen to view or update the information and add or remove Household members.

View Household Members

Click on the Household ID

Update Enrollment

Referring provider*

Holly

Referring provider contact*

123-456-7890

Referring provider email*

Household

Test Only New System Client - 2024-01-03 22:16:28.333856+00:00 ⌄

Project start date

mm/dd/yyyy 📅

Project end date

Household

Household ID
Test Only New System Client - 2024-01-03 22:16:28.333856+00:00

Current Living Situations [Add]

Household members are listed here.

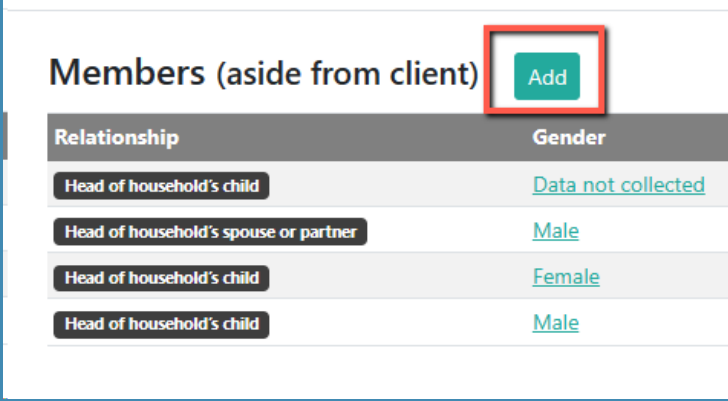To delete an extra line or to delete a household member, click on 'delete' next to the household to be removed.

NOTE: If you add or delete a household member, you must also update the Assessment and save it.

Members (aside from client) [Add]

Relationship	Gender	Age	Actions
Head of household's child	Data not collected	Data not collected	delete
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

Adding Household Members

Click 'Add'

Enter the household member's information.

Click 'Add Household Member' to save.

NOTE: If you add or delete a household member, you must also update the Assessment and save it.

Current Living Situation Management

A current living situation can be reviewed or added from within the context of an enrollment. More than one current living situation can be entered per enrollment. This allows us to track what is happening with the client during the time an enrollment is actively being prioritized.

To view or update a Current Living Situation

Update a Current Living Situation

To view or update a current living situation, click its link in the list within the right-hand column of an enrollment.

Enter information in all fields.

Add a Current Living Situation

To add a current living situation, click the 'Add' button next to the list heading in the right column of an enrollment.

Household

Household ID
Test Only New System Client - 2024-01-03 22:16:28.333856+00:00

Current Living Situations [Add]

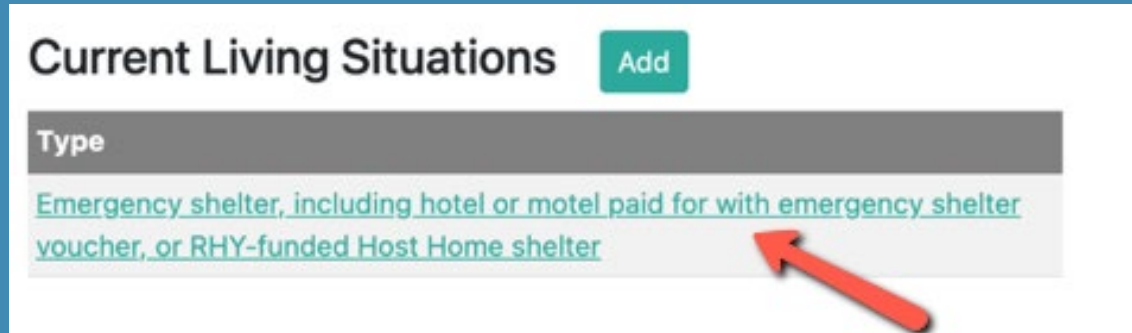| Type |
| --- |
| Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside) |

Domestic Violence [Add]

Survivor - Currently Fleeing
No - No

Domestic Violence Management

A domestic violence entry can be reviewed or added from within the context of an enrollment. More than one domestic violence entry can be entered per enrollment. This allows us to track what is happening with the client during the time an enrollment is actively being prioritized.

View or Update a DV Entry

To **view or update** a domestic violence entry, click its link in the list within the right hand column of an enrollment.

Domestic Violence [Add]

Survivor - Currently Fleeing
No – No

Assessment

Type - Level
In Person – Housing Needs Assessment

If the client is fleeing DV, ALL fields must be entered

Add 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

[Add Domestic Violence] [Cancel]

Adding a DV Entry

To **add** a domestic violence entry, click the 'Add' button next to the list heading in the right column of an enrollment.
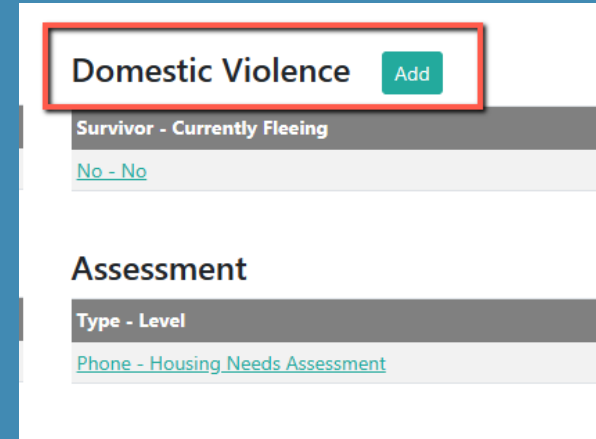
If the client is fleeing DV, <u>ALL</u> fields must be filled out in order for the prioritization to be accurate. Click 'Update Domestic Violence' to save.

What is the Assessment used for?

➢ If the Barriers has not been entered yet, one must be added. This is your first step.

➢ The Assessment is used to pull all information into each enrollment. It's what makes all of a client's information prioritize correctly.

➢ If the Assessment is not done, the client will not prioritize correctly and information will be missing.

➢ You must update the assessment in order to score/prioritize a client's enrollment.

➢ All other information should be entered before you update the Assessment.

➢ Updating the Assessment your last step in editing or entering a client.

View or Update an Assessment

To view or update an assessment, click on the link that is currently there.

View or Update an Assessment (continued)

➢ The 'Date assessed' reflects the date the CE intake was completed. If CE was completed but was not entered into Non-HMIS until 3 days later, this date should be backdated to match when the paperwork was completed with the client(s).

➢ Do not change this date after the fact. It must stay as the date of when intake was completed.

➢ To update the Assessment, you only need to click on 'Update Assessment.' to save it.

Update Assessment

Assessment type*   Date assessed

Phone   ⌄   01/03/2024

Assessment level*

Housing Needs Assessment   ⌄

[Update Assessment] Cancel

- After you update the Assessment, it will take you back to the Enrollment screen.

- You do not have to click on 'Update Enrollment' after updating the Assessment. Once you update the Assessment, the information will be saved.

Update Enrollment

Referring provider*

BOS

Referring provider contact*

Holly Sieren

Referring provider email*

holly.sieren@wibos.org

Do you have a chronic disabling condition?

Yes

If yes, how many chronic disabling conditions do you have?

2

Do you have non-chronic medical needs?

Yes

Househ

Test C

Project

mm/c

Project

mm/c
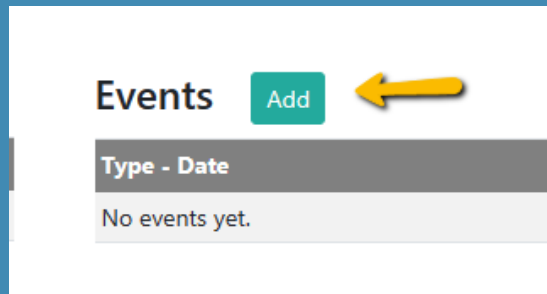
☐ FUP

Update Enrollment   Cancel

Event Management

Events help determine where in the referral process a user is. An event can be reviewed or added from within the context of an enrollment. More than one event can be entered per enrollment

To Add an Event

Adding an event allows us to track the outcome of a client's referral.

Add Event (continued)

Referral Result:
- ✓ Successful referral: client accepted
  (i.e., housed through a CE housing project)
- ✓ Unsuccessful referral: client rejected
  (i.e., client self-resolved, requested to be removed from CE, etc.)
- ✓ Unsuccessful referral: provider rejected
  (i.e., unable to contact)

Result Date
- This is optional. It's used to keep track of the referral. For example, if you referred the client to an emergency shelter, you would put in the date you made that referral in the 'Date of Event' and the date they were able to enter shelter in the 'Result Date' field.
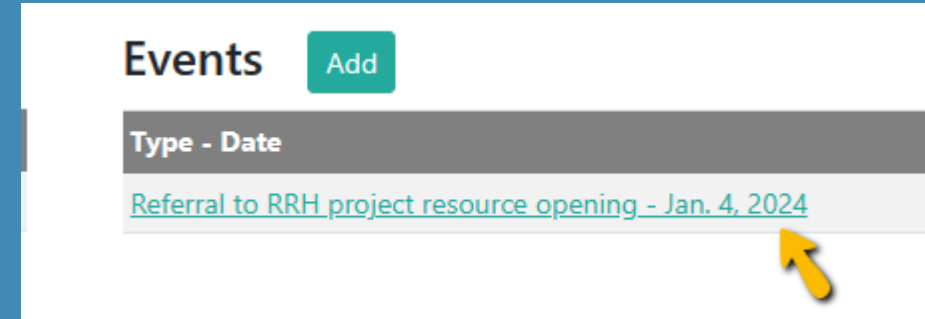

Location of Crisis Housing or Permanent Housing Referral
- You choose which coalition the client was housed in, or last know to be residing in.

View or Update an Event

To view or update an event, click its link in the list within the right hand column of an enrollment.

If a previous event was entered, it would show the type and date. You click on the type/date to view or update it.

Events [Add]

Type - Date

Referral to RRH project resource opening - Jan. 4, 2024

Update Event

Event*

Referral to RRH project resource opening

Referral result*

Successful referral: client accepted

Date of event*

01/04/2024

Result date

mm/dd/yyyy

☐ Problem Solving / Diversion / Rapid Resolution intervention or service result - Client housed / re-housed in a safe alternative

☐ Referral to post-placement / follow-up case management result - Enrolled in Aftercare project

Location of Crisis Housing or Permanent Housing Referral

Rock Walworth

[Update Event] [Cancel]

Fill in all fields. Click 'Update Event' when completed.

Exit Management

Exits determine whether an enrollment is open or closed, and thus, whether or not it continues to be prioritized on the list associated with the enrollment. An exit can be reviewed or added from within the context of an enrollment. Only one exit can be added to an enrollment, and it cannot be undone.

Add an Exit
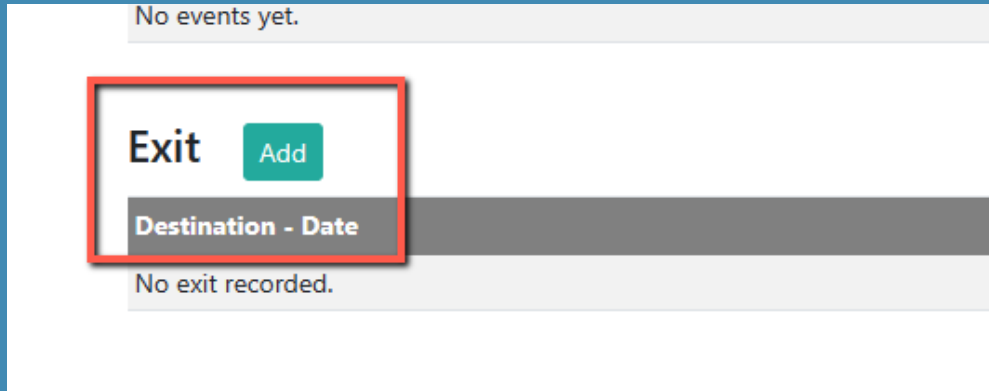
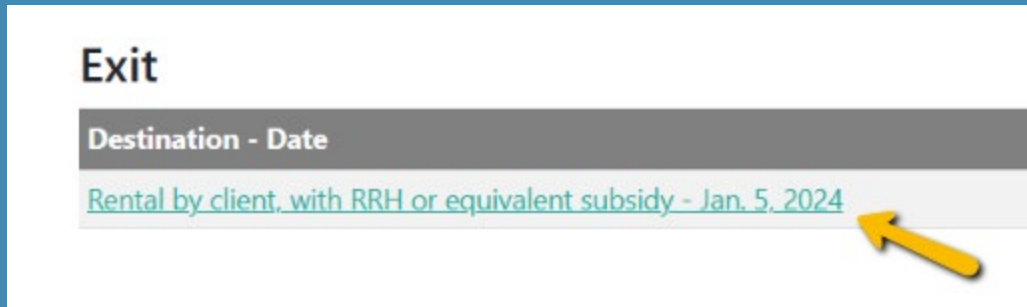To add an exit, click the 'Add' button next to the list heading in the right column of an enrollment.
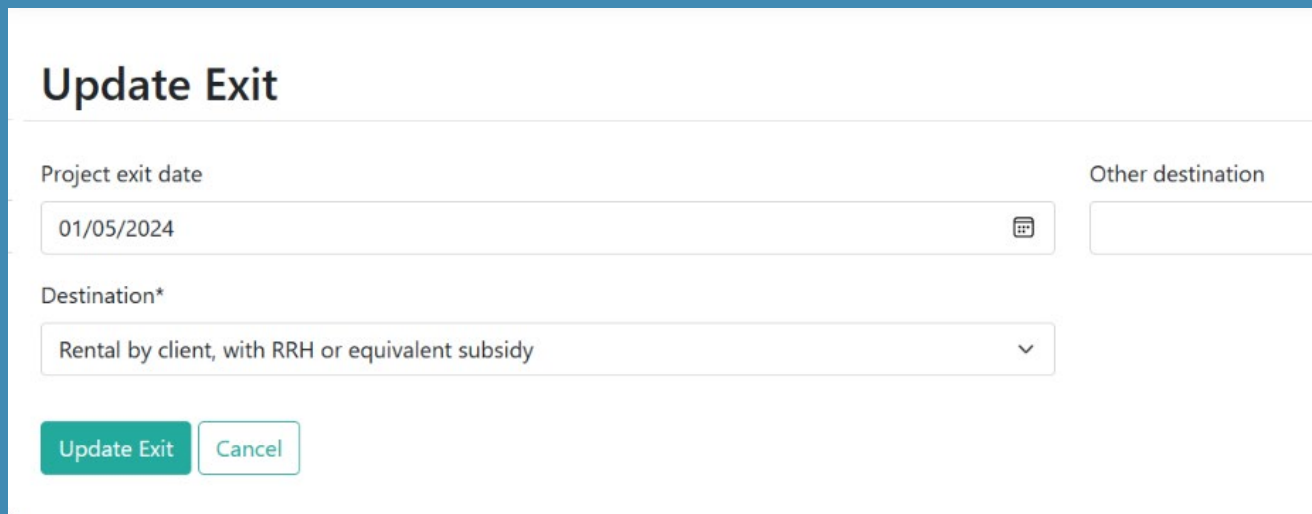

Enter all fields. Click 'Add Exit' when completed.

Update an Exit

To view or update an exit, click its link in the list within the right hand column of an enrollment.

If an exit was already entered, there will be a date of the entry.

Click on the date to view additional information or to edit.

Enter all fields. Click 'Update Exit' when completed.

Requirements to be granted access to the Non-HMIS System

Complete the following trainings:

✓ Introduction to Coordinated Entry

✓ Coordinated Entry Access Training

✓ Pre-screen & Barriers Assessment Training

✓ Non-HMIS Training - version 2: How to Enter a New Client

✓ Non-HMIS Training – version 2: How to View, Edit & Exit a Client

All trainings can be found on our website: CE (wiboscoc.org)

Thank you for attending this training!

To receive access to the Non-HMIS System, please completed the required training and contact the Coordinated Entry System Specialist.

Holly Sieren

holly.sieren@wibos.org

Include the coalition you're in, the agency you work for, and your work phone number.