# HMIS Data Entry Manual

Welcome to HMIS (Homeless Management Information System). This is an online database used to record client information, such as demographics, history, case notes, household composition, and program entries.

You can log in to HMIS by going to HAWNY’s website and looking for the login in option. You can bookmark the page on whatever computer you use for future reference. Or use the following links:

* Training site: https://sp5.servicept.com/bas-net\_demo/
* Live site: https://sp5.servicept.com/bas-net/

## Once logged in there are two important features to point out, Backdating and the Search bar.

Clients must be entered into HMIS within 72 hours. If you need to enter data outside of this window please use the backdating function.

* Click on Back Date in the upper right hand corner
* Enter the date you need to enter the data for
* The dashboard bar will change color, to exit press the red x button
* Backdating allows for entering of data on a previous date

The search bar in the right hand upper corner allows you to search for clients by last name, first name, Client ID, and SSN. It also allows you to search for providers.

* Use name and SSN to search clients already in the system
* Use name, last 4 digit of SSN and year of birth to identify if there is a matching record.
* Click Edit (the pencil) if a matching record found
* Otherwise click “Add new client”

*It’s very important that you carefully enter the name, SSN and DOB.*

## To *Add New Clients* click the *Client Point* tab on the sidebar on the left.

First you should search to see if your client is already in the system. This makes sure duplicates don’t populate the system and it makes it easier to track clients as they move through different programs.

At this point you should enter as much information as possible to “cast a wide net”

If your client is not in the system you can add them to the database.

### Households – ONLy use this tab if your program serves families

To link multiple clients in one household:

* Click on Households tab
* Search for any existing households
  + If a household exists, then add client to that household
* Press Start new household
* Select household type
* Search for next household member, including their SSN in the search
  + If the client is not in the system add them to the database
* Continue this step, searching for every household member
* Once household is complete, press Save and Continue
* Assign household relationships and in relation to head of household and Household Type
  + **Do Not** complete the HUD COC and ESG assessment for any new clients under the Households tab. All other information goes under the Entry/Exit tab
* Press Save and Exit

### ROI

* This is where you record your client’s Release of Information.
* An End date is negotiated for the HMIS release. It is encouraged to select a date that spans the length of time the client is likely to participate in the program.
* If new information is entered after the expiration of the ROI then this information will not be shared. You must obtain a new ROI prior to entering information to be shared. The default rules applied at data entry continues for the life of the data.
* Without an ROI or when staff closes a record, HMIS operates just like any other internal automated record keeping system. The sharing functionality is disabled.

### Entry/Exit

* Here is where you will record when clients enter your program.
* Your type will always be HUD. (Except in SSVF, RHY, and VA programs)
* Be sure to add additional household members if they entered the program at the same time by checking their boxes. Otherwise the family will be separated.
* Exit destinations can be found in the destination chart in your exit intake form.

## After selecting Save and Continue you will be brought to a new screen where you can complete the HUD CoC and ESG Assessment

### HUD CoC and ESG Assessment

* **DOB**
* **DOB Type –** Data quality question. Approximate by using January First of the appropriate year.
* **Primary Race**
* Secondary if applicable
* **Ethnicity**-Hispanics are considered “white” by HUD standards if client identifies with no other race
* **Gender**
* **Health Insurance\*** is the first of 4 dynamic questions that require HUD Verification.
* **Disability Type\*** is where you add the specific type of disability.
  + This is where you answer type, determination, documentation, notes, and long term condition**. DO NOT** answers “HOPWA or PATH only” questions if not applicable.
* **Relationship to Head of Household-**Choose the appropriate relationship to the client
* **Client Location** is either Erie/Niagara or Cattaraugus
* **Is the Client entering from the streets, shelter, or safe haven?**
  + (If Yes) When is the approximate date started?
* **Regardless of where they stayed last night—**Number of times the client has been homeless on the streets, in a shelter (ES), or safe haven (SH) in the past three years including today.
* **Total number of months homeless on the streets, in a shelter (ES), or safe haven (SH) in the past three years.** Even if the client has been homeless for less than 1 month, please round to the nearest month.
* **Residence Prior to Project Entry** is the situation your client was in directly before coming to your program. This refers to where your client spent the night before coming to your program.
  + There are two follow up Sub-Questions for this question. Only answer these sub-questions if your client spent their night before coming to your program at an Emergency Shelter or Transitional Program. Then only select **ONE ANSWER** if applicable. These are either/or questions as your client cannot spend their night prior in both an emergency shelter and transitional program. If their residence prior to project entry was not an emergency shelter or transitional housing program **DO NOT** answer these sub questions.
* **The length of stay** refers to the Residence Prior to Project Entry
* **Length of Time Homeless - Status Documented?**  Are they in the system or were referred to you by another agency? Did they come to you off the street?
* **Chronically Homeless** by definition is when a client is homeless for more than one year OR 4 episodes of homelessness in less than 3 years AND they have a disability.
* **Income\***- If they have any income, mark down if they are receiving income, their total income and add the specific sources. Be sure to include an amount, a start date, and type. No end date is required at this stage.
* **Non-cash benefits\***, which can be SNAP, TANF etc…, are entered the same way as Income.
* **Domestic Violence**. If this question is marked No, the following questions can be left unanswered, but it will prompt you every time you save and exit to answer this question. You can click NO.
* **Primary and secondary reason for homelessness**
* **Zip Code of last permanent address**

## \*please remember to complete hud verification. HUD Verification is resolved by clicking on the red triangle and selecting yes or no for each possible source. The red Triangle will turn into a green check mark.

*\*When you click “save” the system might ask you to answer some questions. If you are sure that you intentionally skipped those questions because it doesn’t apply to your client, you should click “NO”. Otherwise the data you enter will not be saved.*

### Data Sharing

To restrict sharing of client data:

* Click on the red lock at any assessment /data element that your agency agrees to share
* Press the red minus sign next to Visibility Groups or you add more agencies that the client is willing to share data with but they must have an ROI for each additional agency
* Your data will now only be shared with the Homeless Alliance of WNY

### Updating Information after initial interview

To update a client’s information you must use the interim review option. This is found under the Entry/Exit tab.

* If a client’s income, non-cash benefits, disability, or health insurance has changed you must adjust it accordingly in HMIS.
* All clients’ income/ non-cash has to be reviewed at entry, at exit and at least once annually during program enrollment

For clients who are enrolled 364 days or less:

* You are not required to add an annual assessment. However, you are required to use the interim review update option every time income changes occur. APR will not pick up anything without an interim review.

For clients who are enrolled 365 days or more:

* You are required to have an Interim Review Annual Assessment. Interim Review Date should fall + or – 30 days on the clients’ anniversary day, but within your operation date.

A leaver’s income will be updated/review on exit.

To add an “interim review”

* Click Entry/Exit tab
* Click the icon under the Interims column.
* Select the type of review, either “update” or “annual assessment” and continue
* To update information (i.e. raise or lower an income):
  + Find the original source of information that you are updating by clicking ‘next’ within the grey box of listed sources.
  + Click the pencil icon to edit that source and add an end date, hit ‘save and add another’
  + Add new source of information with the same type, new starting date, and new amount
* To add a completely new source of income, non-cash benefits, disability or health insurance:
  + Select ‘Add’ under the appropriate section
  + Add amount, type, and any other information needed, click save and exit.

### Assessment tab

* Assessments are based on your agency’s need. You will select the assessment that is required by your agency and click “submit” to view the assessment.
* If your agency participates in using the Vulnerability Index or VI-SPIDAT, this is where you would find these assessments.

### Service transaction

* Service transaction is required for all PATH programs and is available to all programs. Agencies can set up a drop down list that reflects your agencies’ services.
* To create a service, you will click “Add service”. Select the provider accordingly and then choose the service.
* Once your service is closed, please make sure to put an end date. Also complete the need status and outcome.

### Homework

Create a new client and a new household (if you client serves families). They should have an ROI, a source of income, non-cash benefits, a disability, health insurance, and be entered in your program using the HUD/CoC Entry Assessment Don’t forget to complete HUD Verification. Try to practice updating income through interim review and other features your program uses. Treat this as if you are doing intake on a new client. Email the Client ID # to your trainer. Once they have reviewed your homework and all necessary corrections are made, you will be licensed on HMIS.