



HMIS PROCESS GUIDE FOR ESG/ESG-CV PREVENTION SERVICES

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HMIS PROCESS FOR ESG/ESG-CV PREVENTION SERVICES

IMPORTANT PREREQUISITE NOTICE

This workflow requires that users have a FIRM understanding of the ClientPoint Module as well as the basic ServicePoint functionality. Individuals who are either new to the system or are unfamiliar with any aspect of those things mentioned above MUST complete the appropriate prerequisite training before continuing.

INTRODUCTION

There are several important timelines that need to be adhered to with this process. Refer to the City of Detroit Prevention workflow for details. This HMIS process guide outlines the HMIS data entry requirements for each of those workflow activities. If the project also receives funding from another source, please refer to the appropriate grant specific workflow document(s) for additional data entry requirements, if applicable.

Once an HMIS referral is received from CAM, you will need to connect with the client to perform a brief intake. The referral will be received through ServicePoint and can be viewed through the Service Transactions tab or by Running a referral report.

ACCESSING THE CLIENT RECORD

The process begins with the following steps:

1. EDA (Enter Data As) into your Prevention page, if not already defaulted to that provider bin.

To EDA into your Prevention page

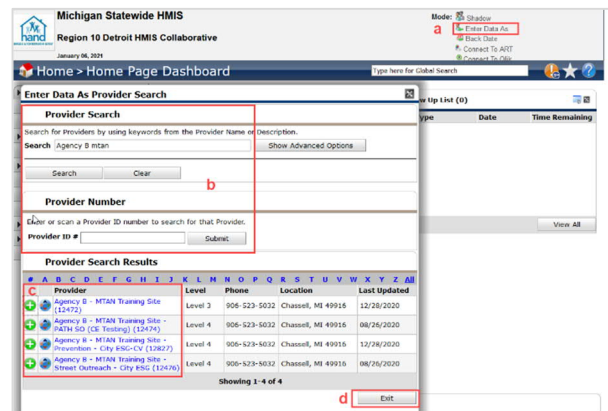
- a. Click on the Enter Data As link located in to top right corner of the screen.
- b. Search for your Prevention Provider Page.
- c. Click the green plus (+) sign to select that provider.

2. Select backdate mode, if not entering data in real time.

To enter backdate mode,

- a. Click on the Back Date link located under the Enter Data As link in the upper right-hand corner of your screen.
- b. Enter the date the data was captured, if not today's date.
- c. Click Set Back Date.

3. Locate the existing client in ClientPoint.



- a. Click on ClientPoint located in the left column of the screen.
- b. Search for the client by entering the client's details or by using the Client ID #.

- To search by the Client Name: enter the client details (i.e. first name, last name); click the Search button; and select the client from the Client Results. If the client is located in the search results, click the client's name in the search results list.
 - To search by the Client ID #: enter the Client ID# and click the Submit button.
2. Make note of the information found in the Homeless Prevention section of the Client Profile Screen.
 3. Scroll to the Client Notes section at the bottom of the Client Profile screen to record any notes regarding the contacts (or attempted contacts) made with the client.

Client Notes			
Provider	Note Date	Note Preview	Full Note
<input type="button" value="Add New Client Note"/> <input type="button" value="Print"/>			No matches.

ADDRESSING CANCELLED REFERRALS

When a referral needs to be cancelled, the referral outcome will need to be entered into the HMIS.

To Cancel a referral:

1. Update the Client Notes located at the bottom of the Client Profile screen to reflect the reason for cancelling the referral.
2. Update the Referral Outcome, as follows:
 - a. Navigate to the Service Transactions tab and select View Entire Service History.
 - b. Click on the pencil icon next to the open referral.
 - c. Scroll to the Referral Data Section and select Cancelled from the Referral Outcome dropdown list of options.
 - d. Select Unable to contact client from the If Canceled or Declined, Reason dropdown list of options.
 - e. Click Save & Exit

ADDRESSING DECLINED REFERRALS

If the Client has been reached but was determined to be ineligible for prevention services, the referral will be DECLINED and the referral outcome will need to be entered into the HMIS.

1. Update the Client Notes located at the bottom of the Client Profile screen to reflect the reason for declining the referral.
2. Update the Referral Outcome, as follows:
 - a. Navigate to the Service Transactions tab and select View Entire Service History.
 - b. Click on the pencil icon next to the open referral.
 - c. Scroll to the Referral Data Section and select Declined from the Referral Outcome dropdown list of options.
 - d. Select the appropriate reason from If Canceled or Declined, Reason dropdown list of options.
 - e. Click Save & Exit.

ADDRESSING ACCEPTED REFERRALS

Updating the Household (if necessary)

1. Click on the Household tab to edit household information.

NOTE: If the client is part of a household, all family members must be listed under the Household tab as data entry is required on all members of the family. Households are NOT created for single individuals.

Managing the Visibility of the Client Record

IMPORTANT NOTES

An active electronic Release of Information (ROI) MUST be in place for data sharing to occur both internally (within the agency) and externally with other community partners (i.e. CAM, Shelters, Navigators, etc.):

Although CAM is collecting a 30-day verbal release from clients at access, it is important that a second release be obtained and documented by the prevention provider to ensure data entered after the initial 30-day window can still be shared.

To add a Release of Information:

1. Click the ROI Tab.
2. Click the Add Release of Information button.

- Make sure to include all household members (if applicable).
- Select Release Granted – ‘YES’
- Complete the Start Date/End Date and Documentation fields.

NOTE: If the client refuses to share data with external partners, contact HAND's Help Desk <https://www.handetroit.org/helpdesk> to request assistance with adjusting the client record to allow for internal sharing only.

Creating the Prevention Project Entry

- Navigate to the Entry/Exit tab to add a new Prevention Project Entry

- Click the Add Entry/Exit button to add the new Prevention Project Entry.

- If household members are present, click the box(s) to select them.
- Ensure the correct Provider Bin is listed.

Note: if the correct Provider Bin is not listed, then go back to the first step in this workflow to EDA into your Provider Prevention Bin.

- Select HUD as the entry Type.
- Ensure the Project Start Date equals the date you conduct the Initial Interview.
- Click Save & Continue.

Completing the MSHMIS RRH and Prevention Intake Assessment

- Verify the Basic Demographic Information section was completed and is correct for all household members, including children.
- Verify any existing information that has been completed is correct and complete the remaining fields following the headers as a guide.

- a. Complete the Health and Disability Information section for all household members, including children.
 - b. Update the Homeless History Interview section, if applicable.

Note: The Prior Living Situation is the living situation that the client was in IMMEDIATELY prior to entering the project.
 - c. Complete the Domestic Violence Information section.
 - d. Complete the Income & Non-Cash Benefits section for the Head of Household & Adults.
3. Skip the Connection with Soar question.
 4. Skip the Current Living Situation section.
 5. Skip the Coordinated Entry section.
 6. Complete the Contact Information details for the head of household only.
 7. Add Other Prevention Funding for the Head of Household, if applicable.
 8. Skip the VI-SPDAT section.
 9. Click Save.
 10. Complete the Assessment for each additional Household member, if applicable.
 - a. Click the name of the Household member located in the Household Member's column of the assessment.
 - b. Complete the above-referenced fields, as applicable, for the selected household member.
 - c. Click Save.
 - d. Click on the name of another household member and repeat the process, if applicable.
 - e. Go back to the Head of Household record, when finished entering data for all household members.
 11. Click Save & Exit.

Updating the Referral Outcome

- Referral Accepted - If the client qualifies for your prevention services:
 - a. Navigate to the Service Transactions tab and select View Entire Service History.
 - i. Click on the pencil icon next to the open referral.
 - ii. Scroll to the Referral Data Section and select Accepted from the Referral Outcome dropdown list of options.
 - iii. Click Save & Exit.

ADDRESSING CASE PLANS & CASE NOTES

1. Navigate to the Client Information Tab.
2. Select the Case Plans tab to add client Goals and Case Plan documents.
3. Click the Add Goal button.
 - a. Ensure at a minimum the following required fields are completed.
 - Date Goal was Set.
 - Classification = ESG.
 - Type = Retain or resettle/safe affordable housing (initial Prevention goal).
 - Overall Status – In Progress.

- b. Click Add Goal.
- c. Click Add Case Note to add the initial case notes pertaining to this goal.

Adding Additional Case Notes

To add additional case notes to the existing goal:

- 1) Navigate to the Case Plans tab and click the Notes icon for the Goal.

Goals									
	Classification	Type	Date Added	Date Set	User Updating	Provider	Notes	Latest Note Date	
	ESG	Retain or resettle/safe affordable housing (initial Prevention goal)	02/15/2021	02/04/2021	Viki DeMars	Agency B - MTAN Training Site - Prevention - City ESG-CV		02/04/2021	

- 2) Click the Add Case Note button to open another window for adding the case note.
- 3) Add the Case Note and Save.

We encourage you do not add services through case plans... but instead do it through the service transactions tab.

PROVIDING SERVICES

Adding the HMIS Service Need Transaction(s)

1. Select Add Multiple Services from the options displayed on the Service Transactions dashboard.
 - a. Check the box next to each household member, if household members are present and if the service is applicable to all household members.
 - b. Ensure the Service Provider is correctly displayed.
 - c. Leave the Number of Services set to 1.
 - d. Establish the start and end date for the service.
 - i. Start Date = the date the service is provided (if not already set in backdate mode).
 - ii. End Date = the start date. However, a rent payment assistance service end date should be the last date of the month (if the rent covers the entire month).
 - e. Select the Service Type by clicking the Pencil Icon and choosing the appropriate service from the dropdown list of options.
 - i. If assisting with back rent, select Rent Payment Assistance as the Service type.
 - ii. If assisting with back utility, select Utility Service Payment Assistance as the Service type.
 - f. Complete the Service Costs fields for back rent or back utility services. Rent payment & rent deposit assistance in general are on a month by month basis so there is no need to put anything in Service Costs for that.
 - i. Enter the Number of Units (i.e. months) being covered for back rent or back utility
 - ii. Select the appropriate Unit Type from the drop-down list of options.
 - iii. Add the Cost per Unit.

Note: The Total Cost of Units will be calculated automatically upon Save & Exit.

- g. Click Add Funding Source located under the Apply Funds for Service section of the form.
 - i. Use the Fund Search option to search for City ESG.
 - ii. Click the Green Plus Icon to select the City ESG option.

The screenshot shows a 'Fund Search' form with a search bar containing 'City ESG' and a 'Show Advanced Options' button. Below the search bar is a checkbox for 'Show Matching Funds ONLY' which is checked. There are 'Search' and 'Clear' buttons. Below the search bar is a table titled 'Fund Search Results' with columns for 'Fund', 'Submission Deadline', and 'Remaining Balance'. The first row is highlighted and has a green plus icon in a red box next to it. The other rows are also highlighted and have green plus icons.

Fund	Submission Deadline	Remaining Balance
City ESG	N/A	N/A
City of Detroit - ESG Prevention	N/A	N/A
City of Detroit - ESG Rapid Re-Housing	N/A	N/A
United Way Saginaw City ESG 2011 Surplus	N/A	N/A
United Way Saginaw City ESG 2012 2nd Rnd	N/A	N/A

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2. Enter the financial amount of the City ESG service along with the Client Co-Pay, if any.

3. Navigate to the Need Information section.

Need Information

Need Status *	Service Completed ▾
Outcome of Need	Fully Met ▾
If Need is Not Met, Reason	-Select- ▾

- a. Select Service Completed from the Need Status dropdown list of options.
 - b. Select Fully Met from the Outcome of Need dropdown list of options.
4. Click the Add Another button to add additional services, if applicable.
 5. Click Save & Exit once all services are added.

UPDATING CLIENT INFORMATION USING INTERIM REVIEW

To update your client's assessment data in HMIS, you will need to create an Interim Review. Interim reviews can be created at any time a determination has been made that there has been a change to a client's assessment data. (ie. changes to income, benefits, housing status, etc.)

1. Add an Interim review to the Program Entry for the referral as follows:
 - a. Navigate to the Entry/Exit tab and click the icon in the Interims column of your open Prevention Program Entry.

Entry / Exit							
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
DRMM - Detroit CoC - Oasis Shelter - Overflow - City ESG-CV (12224)	HUD	02/19/2021					
MDHHS - 1. CCSS - Detroit CoC - Interfaith Rotating Shelter (DHS) ESP (B) (304)	HUD	02/10/2021	02/10/2021				
Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)	HUD	02/04/2021					
Agency A - MTAN Training Site - Coordinated Entry - HUD CoC-SSO (12471)	Basic	02/03/2021	02/04/2021				

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- b. Click Add Interim Review.
- c. Check all relevant Household members for which the review is relevant; check the Household type to choose all household members.

Household Members

To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name.

- (429577) Female Single Parent
- (1448337) Data TEST, Data TEST (Entry Date: 02/23/2021 7:17 PM)
- (1455870) Data TEST, Data Test child (Entry Date: 02/23/2021 7:17 PM)
- (1455876) Data TEST, Test Child 2 (Entry Date: 02/23/2021 7:17 PM)

- d. Select Update from the Interim Review Type dropdown list of options.
- e. Ensure to enter the correct Review Date if not entering the same day the review is effective.
- f. Click Save & Continue to proceed to the MSHMIS Update Assessment.

- Verify existing data for accuracy and update the MSHMIS Update Assessment with the new details.

Note: When updating data, it is important that you never overwrite your history in sub-assessments. These sub-assessments include Monthly Income, Non-Cash Benefits, Health Insurance and Disabilities.

To reflect a change in a sub assessment:

- Locate the sub-assessment record that needs updating.

Family Income and Non-Cash Benefit Information

Total Monthly Income G

Income from Any Source G

Monthly Income HUD Verification

	Monthly Amount	Source of Income	Receiving Income Source?	Start Date *	End Date
		Other (HUD)	No	02/04/2021	
		Child Support (HUD)	No	02/04/2021	
		VA Non-Service Connected Disability Pension (HUD)	No	02/04/2021	
		Alimony or Other Spousal Support (HUD)	No	02/04/2021	
	US\$500.00	Earned Income (HUD)	Yes	02/04/2021	

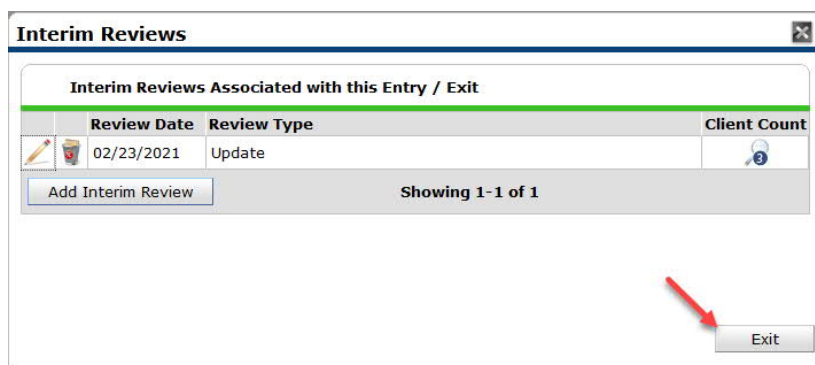
Add View Gross Income Showing 11-15 of 15 First Previous Next Last

- Add an end date on the current record indicate the information is no longer accurate as of that date then add a new record to show the updated information. Make sure the start and end dates for the sub-assessment records you are updating, do not overlap.
- Make sure to update the record for the income source that was created at Entry. If the client had no income at Entry but later started earning income, you will need to reflect that in the Monthly Income sub-assessment, by end dating the original entry and adding the new record.

Show All Monthly Income Records

	Provider	Monthly Amount	Source of Income	Receiving Income Source?	Start Date	End Date
	Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)		Alimony or Other Spousal Support (HUD)	No	02/04/2021	
	Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)		Child Support (HUD)	No	02/04/2021	
	Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)	US\$500.00	Earned Income (HUD)	Yes	02/04/2021	02/18/2021
	Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)	US\$600.00	Earned Income (HUD)	Yes	02/19/2021	
	Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)		General Assistance (HUD)	No	02/04/2021	

- Click Save to save the assessment data and proceed to the next household member (if applicable).
- Follow the same process to complete the Assessment for each member of the Household.
- Click Save & Exit when you have completed the data entry of the last Household Member.



- Click Exit on the Interim Reviews pop-up window.

This will return you to the Entry/Exit Tab of the Client Information Profile, where you will be able to see that 1 interim has been completed.

Entry / Exit						
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Agency B - MTAN Training Site - Prevention - City ESG-CV (12827)	HUD	01/25/2021		1		1
Agency B - MTAN Training Site - Street Outreach - City ESG (12476)	HUD	01/21/2021	01/21/2021			1

Add Entry / Exit Showing 1-2 of 2

EXITING THE CLIENT

Prior to exiting the client:

- End date all service transactions, if needed.
- End date assigned case manager, if any.
- Enter any outstanding case notes.
- Change the overall goal status to service completed.
- Update any data elements that changed since entry or last interim review (if applicable).

Entry / Exit						
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Agency A - MTAN Training Site - Coordinated Entry - HUD CoC-SSO (12471)	Basic	12/17/2020				1

Add Entry / Exit Showing 1-1 of 1

To exit the client:

- Click the pencil next to the Exit Date in the Entry/Exit screen.
- Select all household members, if applicable.
- Add the Exit Date, which will be one day after the entry date.
- Select Completed program from the Reason for Leaving dropdown list of options.
- Select the appropriate Destination from the drop-down list of options.
- Add Notes, if applicable.

7. Scroll to bottom of the MSHMIS Exit Assessment screen and answer the following

Question below: Required for Prevention - All Clients in HH)

Housing Assessment at Exit	-Select- <input type="button" value="G"/>
<i>If Moved to new housing unit, Subsidy information</i>	-Select- <input type="button" value="G"/>
<i>If Able to maintain housing at entry, Subsidy Information</i>	-Select- <input type="button" value="G"/>
If HARA answer the following:	-Select- <input type="button" value="G"/>

8. Click Save & Exit.