



# NorCal HMIS User Guide – Client Entry

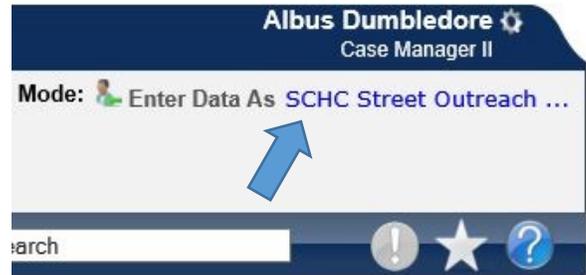
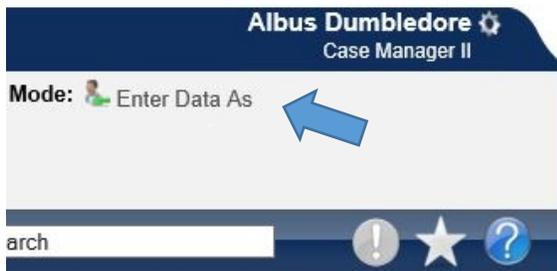
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## Search the System for a Client

Begin by logging into the system. Before searching for a client, Please make sure you are clicking on “Enter Data As” below your name in the top right hand corner. This will pop up a provider search screen allowing you to choose which Project you will be entering the Client into. Your project will now show in the top right.



You can now click on ClientPoint in the navigation tabs to the left of the screen. Selecting ClientPoint will bring up the Client Search screen. You will want to make sure to thoroughly search the system for the client you are looking for. HMIS contains MANY client records and inadequate searching can result in duplicate client records. These duplicate client records can cause lots of confusion and frustration. The HMIS staff requires at least two (2) searches; one by Last Name and one by Social Security Number. Remember that you can find clients without a full name. (I.E. Potter will show up if you only search for Pott.)

Clicking the search button will provide a list of client results. If the client is already in the system, you can enter the client’s record by clicking on the name of the client or by clicking on the pencil icon.

Client Results								
ID	Name ▲	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count	
30	Potter, Harry	777-98-9800	07/31/1980	The boy who lived	Male		1	

Showing 1-1 of 1

AFTER you have done a thorough search for the client record, and the client does not exist in the system, you have the ability to “Add New Client with this Information” to the system. Adding a new client will create a brand new client record in the system and should only be done after all search options have been exhausted.

After entering the client record, you will start on the Client Profile tab. On this tab, you can enter PI, Demographics and Contact Information. You will also find sections to enter Client Notes, File Attachments, and Incidents.

Client Notes									
Provider	Note Date	Note Preview	Full Note						
Add New Client Note    Print    No matches.									

File Attachments									
Date Added	Name	Description	Type	Provider	Added From				
Add New File Attachment    No matches.									

Incidents									
Start Date	End Date	Incident	Incident Code	Provider	Ban	Site	Staff		
Add New Incident    No matches.									

## Create/Update Household (if applicable)

Households should exist for any group of persons (two or more people) that identify as a household. (If the client is a Single Adult, you are not required to create Household.) Begin by clicking on the Household tab. If you are working with an existing client in the system, this tab will show you any current household information regarding the client. If a household already exists, you can view/add additional household members by clicking on the “Manage Household” button.

Client Information							Service Transactions																								
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments																								
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>▼ (105) Other</span> <span>Manage Household</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>Age</th> <th>Head of Household</th> <th>Relationship to Head of Household</th> <th>Joined Household</th> <th>Previous Associations</th> <th>Household Count</th> </tr> </thead> <tbody> <tr> <td>(30) Potter, Harry</td> <td>37</td> <td>Yes</td> <td>Self</td> <td>04/16/2018</td> <td>0</td> <td>1</td> </tr> <tr> <td>(32) Weasley, Ron</td> <td></td> <td>No</td> <td>Other non-relative</td> <td>04/01/2018</td> <td>0</td> <td>1</td> </tr> </tbody> </table> </div>											Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count	(30) Potter, Harry	37	Yes	Self	04/16/2018	0	1	(32) Weasley, Ron		No	Other non-relative	04/01/2018	0	1
Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count																									
(30) Potter, Harry	37	Yes	Self	04/16/2018	0	1																									
(32) Weasley, Ron		No	Other non-relative	04/01/2018	0	1																									

If no household exists, you can create a new household by clicking on the “Start New Household” button. Make sure that new households are created only if no other households exist.

Search Existing Households

Start New Household

You can then pick the “Household Type” from the drop down menu. You will need to search the system for Household members before you can add a new client to the system. When you are finished adding/finding all the Household members, click on the “Continue” button to move on to the Household Information Screen. You can specify who the Head of Household is on this screen and show the Relationships to the Head of Household. You can also click on the “Add/Delete Household Members” button to change the people associated with this household. You can also edit/update certain Client Record data from this screen. When you are finished, click “Save & Exit” to finish the Household.

**Household Information - (105) Other**

(105) Other Save Save & Exit Exit

Household Type \* Other

Income US\$500.00

Client Count 2

**Household Members**

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(30) Potter, Harry	37	Yes	Self	04 / 16 / 2018	0	1
(32) Weasley, Ron		No	Other non-relative	04 / 01 / 2018	0	1

Add/Delete Household Members Household History Report

## Document the Release of Information (ROI)

It is vital that you have the client sign the Release of Information before entering any personal identifying information about that client into the system. If the client refuses to sign the release of information, please contact the system administrator before continuing with data input. If a client already has a ROI for your agency, please ensure that it is current and not out of date.

Begin by clicking on the "ROI" tab. Click on "Add Release of Information". This is where you will complete the information about the release of information.

Begin by checking the box next to any additional household members that you would like to include in this release of information. Typically the Head of Household will sign the ROI for the entire Household. By checking the box for the entire Household, you will add the ROI information to each individual Client Record.

**Provider** – Defaults to the Project you selected for "Enter Data As." Unless your ROI is specifically for the project, you will want to change this to "Your Provider (Agency)." The HMIS Release of Information is good for the entire agency, regardless of what project the client is receiving services from.

**Start Date** – Select the date that the ROI was signed.

**End Date** – Set the End Date for **three years** from the start date.

**Documentation** – Select "Signed Statement from Client." (In some circumstances, this could be another type of documentation. Please check with your supervisor or HMIS administrator as needed.)

**Witness** – Type in the person that signed as the witness on the hard copy of the ROI. (This could also be you.)

**Release of Information Data**

Provider \* Shasta Community Health Center (Agency) (10) Search My Provider Clear

Release Granted \* Yes

Start Date \* 10 / 01 / 2017

End Date \* 10 / 01 / 2018

Documentation Signed Statement from Client

Witness Witness Name HERE

Save Release of Information Cancel

Once you save the Release of Information you will see a binder clip icon (  ) listed to the right of the end date. You are encouraged to scan and upload the ROI form directly to the client record by clicking on the binder clip icon and attaching the file for the Release of Information.

Release of Information				
Provider	Permission	Start Date	End Date	
 Shasta Community Health Center (Agency)	Yes	10/01/2017	10/01/2018	
<input type="button" value="Add Release of Information"/>		Showing 1-1 of 1		

## Assign a Case Manager

Next, we need to assign a case manager. Begin by clicking on the “Case Managers” tab located on the navigation tab at the top of the client record. Click on the “Add Case Manger” button.



The screenshot shows the client record for Harry Potter. The navigation tabs at the top include Summary, Client Profile, Households, ROI, Entry / Exit, Case Managers (selected), Case Plans, and Assessments. Below the tabs, there is a table for Case Managers with columns for Name, Provider, Phone Number, Start Date, and End Date. The table currently shows "No matches." and an "Add Case Manager" button is visible in the bottom left corner of the table area. A blue arrow points to the "Add Case Manager" button, and another blue arrow points to the "Case Managers" tab.

This will bring up a new window that allows you to assign a case manager to this client or members from the Household. Selecting “ServicePoint User” will allow you to select a case manager from your agency. Selecting “Me” will populate your information into the fields. Selecting “Other” will create text fields where you can type in a case manager’s name that does not have access to HMIS. (If selecting another ServicePoint User from your Agency, you will need to change the “Select User” drop-down menu from your “Enter Data As” project to “Your Provider (Agency).” This will allow you to choose from the case managers at that Agency.)

**Start Date** – Select the start date the case manager begins working with the client.

**End Date** – Keep this open until case management services have ended. Once a case manager no longer works with a client, enter the date the case manager stops services.

## Enter Intake Form Information via Entry in a Project

You will first click on the Entry/Exit Tab located in the navigation tabs near the top of the client record. You will then click on the “Add Entry / Exit” button.

This new pop up window allows you to select several options:

**Household Members** – If the Client is a member of a Household, you can select any additional household members that you want to include in this entry.

**Provider** – Select the project that the client is entering into. (*Remember to select the specific PROJECT that the client is entering rather than your AGENCY*).

**Type** – From the “Type” drop down menu, select the type of Project. (Most projects are under the “HUD” option. If you select the wrong type by mistake, you can correct it on the next screen.

**Project Start Date** – This will default to the current date and time. (If your Intake form was from a previous date, you should enter the intake date here.)

Once completed, please click on the “Save & Continue” button. This will take you to the Entry/Exit Date window.

**Project Start Data - (30) Potter, Harry**

**Household Members**

**To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.**

(105) Other

(30) Potter, Harry

(32) Weasley, Ron

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**Project Start Data - (30) Potter, Harry**

**Provider \*** SCHC Street Outreach (CM) (11)

**Type \*** HUD

**Project Start Date \*** 01 / 16 / 2018 12 : 00 : 00 PM

Save & Continue Cancel

You can also select the members of the Household you are entering into this project. If your client is a single person, you will not have an option. If your client has other household members, you can elect to add them to the project as a household or not depending on the circumstance. (If you have Intake forms for the other members of the household, it will be easier to enter them in at the same time.)

**Household Members**

**This Client is not a member of any Households.**

**Household Members**

**To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.**

(105) Other

(30) Potter, Harry

(32) Weasley, Ron

After you have chosen the **Household Members**, the **Provider**, the **Type** and the **Project Start Date**, you can click on the “Save & Continue” button to open the “Entry/Exit Data” screen where you will be able to complete the **NorCal Advanced Entry (2020) Assessment**.

## NorCal Advanced Entry (2020) Assessment

Please note that some information will be carried over from the Profile tab, but most questions will still need to be answered for EACH client record. You will need to complete the information for each client record in the ENTRY Assessment.

The top of the “Entry/Exit Data” screen will show you the members of the household you selected. (Just the individual if a single client, or the household members if you selected them.)

Individual:

Household Members Associated with this Entry / Exit										
	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes	
	(30) Potter, Harry		01/16/2018							
Include Additional Household Members			Showing 1-1 of 1							

Household:

Household Members Associated with this Entry / Exit										
	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes	
	(30) Potter, Harry		01/16/2018							
	(32) Weasley, Ron	No	01/16/2018							
Include Additional Household Members			Showing 1-2 of 2							

The Entry Assessment section will default to the **NorCal Advanced Entry (2020)** assessment, but you’ll notice you can also enter information from the VI-SPDAT or VI-FSPDAT by selecting the assessment here.

Select an Assessment

<input checked="" type="checkbox"/> VI-SPDAT 2.0	<input checked="" type="checkbox"/> VI-FSPDAT 2.0	<input checked="" type="checkbox"/> <b>NorCal Advanced Entry (2017)</b>
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Select an Assessment

<input checked="" type="checkbox"/> <b>VI-SPDAT 2.0</b>	<input checked="" type="checkbox"/> VI-FSPDAT 2.0	<input checked="" type="checkbox"/> NorCal Advanced Entry (2017)
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The client that you are currently entering an intake form for shows in the Household Members column on the left hand side (if this should be your Head of Household).

**Individual:**

Household Members	NorCal Advanced Entry (2017)												
<input checked="" type="checkbox"/> (30) Potter, Harry Age: Unknown Veteran: Client doesn't know (HUD)	Entry Date: 01/16/2018 12:00:00 PM <table border="1"> <tr> <td>Date of Birth</td> <td><input type="text"/> / <input type="text"/> / <input type="text"/></td> </tr> <tr> <td>Date of Birth Type</td> <td>-Select-</td> </tr> <tr> <td>Gender</td> <td>-Select-</td> </tr> <tr> <td>Primary Race</td> <td>-Select-</td> </tr> <tr> <td>Secondary Race</td> <td>-Select-</td> </tr> <tr> <td>Ethnicity</td> <td>-Select-</td> </tr> </table>	Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>	Date of Birth Type	-Select-	Gender	-Select-	Primary Race	-Select-	Secondary Race	-Select-	Ethnicity	-Select-
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>												
Date of Birth Type	-Select-												
Gender	-Select-												
Primary Race	-Select-												
Secondary Race	-Select-												
Ethnicity	-Select-												

**Household:**

Household Members	NorCal Advanced Entry (2017)												
<input checked="" type="checkbox"/> (30) Potter, Harry Age: 37 Veteran: No (HUD)	Entry Date: 01/16/2018 12:00:00 PM <table border="1"> <tr> <td>Date of Birth</td> <td>07 / 31 / 1980</td> </tr> <tr> <td>Date of Birth Type</td> <td>Full DOB Reported (HUD)</td> </tr> <tr> <td>Gender</td> <td>Male</td> </tr> <tr> <td>Primary Race</td> <td>White (HUD)</td> </tr> <tr> <td>Secondary Race</td> <td>White (HUD)</td> </tr> <tr> <td>Ethnicity</td> <td>Non-Hispanic/Non-Latino (HUD)</td> </tr> </table>	Date of Birth	07 / 31 / 1980	Date of Birth Type	Full DOB Reported (HUD)	Gender	Male	Primary Race	White (HUD)	Secondary Race	White (HUD)	Ethnicity	Non-Hispanic/Non-Latino (HUD)
Date of Birth		07 / 31 / 1980											
Date of Birth Type	Full DOB Reported (HUD)												
Gender	Male												
Primary Race	White (HUD)												
Secondary Race	White (HUD)												
Ethnicity	Non-Hispanic/Non-Latino (HUD)												
<input checked="" type="checkbox"/> (32) Weasley, Ron Age: Unknown Veteran: Yes (HUD)													

Household Members	NorCal Advanced Entry (2017)												
<input checked="" type="checkbox"/> (30) Potter, Harry Age: 37 Veteran: No (HUD)	Entry Date: 01/16/2018 12:00:00 PM <table border="1"> <tr> <td>Date of Birth</td> <td><input type="text"/> / <input type="text"/> / <input type="text"/></td> </tr> <tr> <td>Date of Birth Type</td> <td>-Select-</td> </tr> <tr> <td>Gender</td> <td>-Select-</td> </tr> <tr> <td>Primary Race</td> <td>-Select-</td> </tr> <tr> <td>Secondary Race</td> <td>-Select-</td> </tr> <tr> <td>Ethnicity</td> <td>-Select-</td> </tr> </table>	Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/>	Date of Birth Type	-Select-	Gender	-Select-	Primary Race	-Select-	Secondary Race	-Select-	Ethnicity	-Select-
Date of Birth		<input type="text"/> / <input type="text"/> / <input type="text"/>											
Date of Birth Type	-Select-												
Gender	-Select-												
Primary Race	-Select-												
Secondary Race	-Select-												
Ethnicity	-Select-												
<input checked="" type="checkbox"/> (32) Weasley, Ron Age: Unknown Veteran: Yes (HUD)													

By clicking on the different Household Members names in the left hand column, you can bring up their specific Assessments in the system. In this way, you can fill out assessments for each individual family member from one screen.

The **NorCal Advanced Entry (2020) Assessment** questions will match those asked by your **NorCal HMIS Intake Form**.

**NorCal HMIS Intake Form – Head of Household**

## Entry Form Sub-Assessments (HUD Verification)

There are four Sub-Assessments that you'll need to pay special attention to. They are **Monthly Income**, **Non-Cash Benefits**, **Health Insurance**, and **Disabilities**. So far, when we have needed to add data to the client record in the system, we have clicked on the “Add” button or the pencil icon. For the sub-assessments we will NOT click on the “Add” button. Instead, we need to click on the HUD Verification text or the Warning icon on the right hand side of the specific sub-assessment. This will allow us to access a screen with a much simpler way to collect all the HUD required data.



(\*Note\* Clicking on the “Add” button will only allow you to enter data for one specific type of Income, benefit, etc. By using the HUD Verification you can ensure you are entering data for all possible sources of income, benefits, etc.)

**Monthly Income** HUD Verification 

Monthly Amount  Source of Income

Non-cash benefit from any source

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**Non-Cash Benefits** HUD Verification 

Source of Non-Cash Benefit  Start Date \*  End Date

Covered by Health Insurance

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**Health Insurance** HUD Verification 

Start Date \*  Health Insurance Type  Covered?  End Date

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**Disabilities** HUD Verification 

Disability Type

The pop up screen will allow you to easily select responses for all the recordable fields at once.

**HUD Verification: Monthly Income for 01/16/2018**

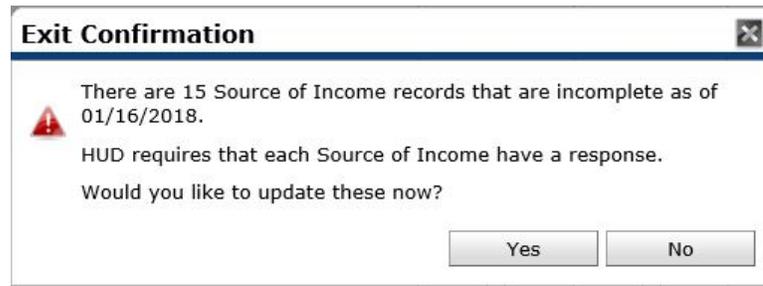
 Per Source of Income, the current records for Monthly Income as of 01/16/2018 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 01/16/2018, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Income Source? value for all incomplete Source of Income records

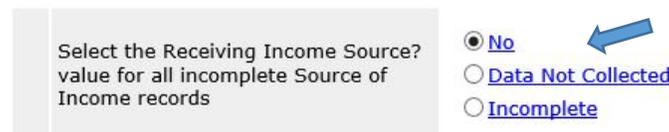
No  
 Data Not Collected  
 Incomplete

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
SSI (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
TANF (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

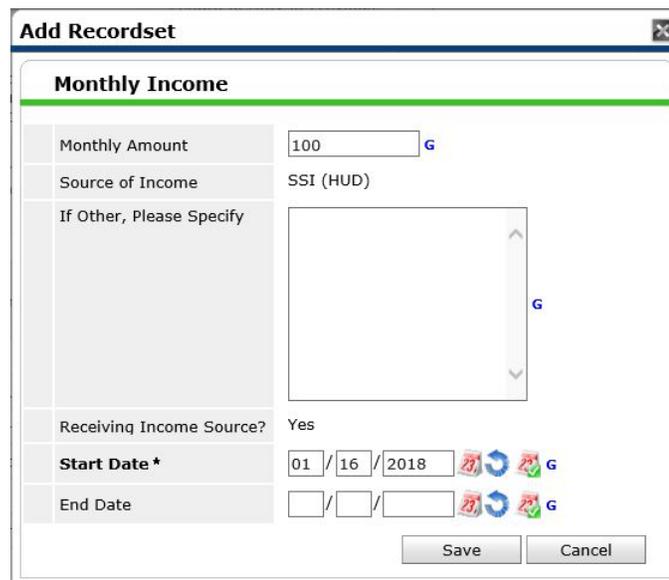
By default, all sources of Income are “Incomplete.” You will need to select the appropriate response to each type of income in order to proceed. If you miss one, you will get an error message when you go to save informing you of the HUD requirement.



(\*Note\* Most clients will only have one or two sources of income. An easy way to change all records to “No” or “Data Not Collected” is by clicking on the Quick Click options at the top of the form. This will change the radio buttons all at once. You can individually select the specific records that would need a “Yes” response.)



In the Monthly Income sub-assessment and the Disabilities sub-assessment, when you click on the “Yes” radio button, a pop-up box will appear. This will allow you to enter specific information regarding that record. (For Income, it will allow you to enter the “Monthly Amount” and any notation. For Disabilities, it will allow you to record if the disability is long lasting or impairs the ability to live independently and any notation. For Non-Cash Benefits and Health Insurance you’ll have to click on the pencil icon after saving the record to input specific amounts or notation.)



When you have entered a response to each record, you can safely click on the “Save & Exit” button to save all the responses for the specific sub-assessment.

### HUD Verification: Monthly Income for 01/16/2018

Per Source of Income, the current records for Monthly Income as of 01/16/2018 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 01/16/2018, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Receiving Income Source? value for all incomplete Source of Income records

- No
- Data Not Collected
- Incomplete

Source of Income	Receiving Income Source?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
 SSI (HUD)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
TANF (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Non-Service Connected Disability Pension (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
VA Service Connected Disability Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Worker's Compensation (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Save Save & Exit Exit

When you return to the main assessment form, you will know if you have successfully responded to each Recordset by the green checkmark next to **HUD Verification**. You will also see the records for each response in the sub-assessment table.

Monthly Income		HUD Verification 
Monthly Amount	Source of Income	
 	Worker's Compensation (HUD)	
 	VA Non-Service Connected Disability Pension (HUD)	
 	Unemployment Insurance (HUD)	
 	VA Service Connected Disability Compensation (HUD)	
 	TANF (HUD)	

Add View Gross Income Showing 1-5 of 15 First Previous Next Last

You will need to make sure you enter data for each sub-assessment record completely and get a green checkmark for each **HUD Verification**. "GREEN IS GOOD" quality!



**Monthly Income** HUD Verification

Monthly Amount	Source of Income
	Worker's Compensation (HUD)
	VA Non-Service Connected Disability Pension (HUD)
	Unemployment Insurance (HUD)
	VA Service Connected Disability Compensation (HUD)
	TANF (HUD)

Add View Gross Income Showing 1-5 of 15 First Previous Next Last

Non-cash benefit from any source Yes (HUD)

---

**Non-Cash Benefits** HUD Verification

Source of Non-Cash Benefit	Start Date *	End Date
TANF Transportation Services (HUD)	01/16/2018	
Other TANF-Funded Services (HUD)	01/16/2018	
Other Source (HUD)	01/16/2018	
Special Supplemental Nutrition Program for WIC (HUD)	01/16/2018	
TANF Child Care Services (HUD)	01/16/2018	

Add Showing 1-5 of 6 First Previous Next Last

Covered by Health Insurance Yes (HUD)

---

**Health Insurance** HUD Verification

Start Date *	Health Insurance Type	Covered?	End Date
01/16/2018	State Health Insurance for Adults	No	
01/16/2018	Other	No	
01/16/2018	Indian Health Services Program	No	
01/16/2018	Private Pay Health Insurance	No	
01/16/2018	Employer - Provided Health Insurance	No	

Add Showing 1-5 of 10 First Previous Next Last

---

**Disabilities** HUD Verification

Disability Type
Physical (HUD)
Mental Health Problem (HUD)

## Finishing the Intake Form

After thoroughly completing the sub-assessments according to the HUD requirements, you can finish entering the data from your Intake form. There are a few questions specific to Domestic Violence and Coordinated Entry.

You will also see a sub-assessment for Optional Intake Questions. If you have collected this information from the client, you can enter it here. (These questions are optional and this is notated on both the Intake form and the **NorCal Advanced Entry (2020)** HMIS assessment this way. ***The information can be helpful, but it is not required.***)

(If you are entering multiple Intake forms for a Household, save you're the Assessment for the current client and then move onto the other Household members by clicking their name in the Household Members box on the left. Complete until every Household member has been entered.)

At the bottom of the Intake assessment, you will see a reminder to enter the VI-SPDAT form. If you have not entered a VI-SPDAT for the client, please save your Intake assessment and input it at this time. You can select it at the top of the assessment.

**Optional Intake Questions**

<b>Start Date *</b>	Do you have a cell phone?	Do you have transportation?	Do you have a valid ID card?
<input type="button" value="Add"/>			

Housing Move-in Date: 01 / 16 / 2018

**Please do not forget to fill out the VI-SPDAT form! Click on Save and then select it at the top of the assessment.**

**Select an Assessment**

**VI-SPDAT 2.0**  VI-FSPDAT 2.0  NorCal Advanced Entry (2017)

## Entering a VI-SPDAT

After you have completed Intake form(s) for your client(s), you will need to enter the VI-SPDAT (or VI-FSPDAT for families). Select **VI-SPDAT 2.0** at the Entry Assessment section. Click on the "Add" button.

**Entry Assessment**

**Select an Assessment**

**VI-SPDAT 2.0**  VI-FSPDAT 2.0  NorCal Advanced Entry (2017)

**Household Members**

- (30) Potter, Harry  
Age: 37  
Veteran: No (HUD)
- (32) Weasley, Ron  
Age: 37  
Veteran: Yes (HUD)

**VI-SPDAT 2.0** Entry Date: 01/16/2018 12:00:00 PM

**VI-SPDAT v2.0**

Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL
<input type="button" value="Add"/> <b>No matches.</b>						

The VI-SPDAT v2.0 assessment will pop up on your screen. Please fill it out the form completely. There are four main sections that will contribute to the score. Once you have completed the form, click on the “Calculate” button at the bottom. Then click on the “Save” button.

PRE-SURVEY	0
A. HISTORY OF HOUSING AND HOMELESSNESS	2
B. RISKS	2
C. SOCIALIZATION & DAILY FUNCTIONS	3
D. WELLNESS	4
<b>GRAND TOTAL</b>	<b>11</b>

**(8+) Recommendation: an assessment for Permanent Supportive Housing/Housing First**

After saving the VI-SPDAT score, you will be returned to the main “Entry/Exit Data” page. Now that you have completely entered the Intake form and the VI-SPDAT form, you can click on the “Save & Exit” button. This will return you to the “Entry / Exit” tab where you can see your entry.

**Household Members**

- (30) Potter, Harry  
Age: 37  
Veteran: No (HUD)
- (32) Weasley, Ron  
Age: 37  
Veteran: Yes (HUD)

**VI-SPDAT 2.0** Entry Date: 01/16/2018 12:00:00 PM

VI-SPDAT v2.0

Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	GRAND TOTAL
01/16/2018	0	2	2	3	4	11

Add Showing 1-1 of 1

**Client - (30) Potter, Harry**

(30) Potter, Harry  
Release of Information: None

-Switch to Another Household Member-

**Client Information** Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Assessments

*Reminder: Household members must be established on Households tab before creating Entry / Exits*

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
SCHC Street Outreach (CM) (11)	HUD	01/16/2018				

Add Entry / Exit Showing 1-1 of 1

## Updates via Interim Review

Any update to a client's basic information can be done via the "Client Profile" tab. The Interim and Follow Up reviews should be used to update Monthly Income, Non-Cash Benefits, Health Insurance, Disabilities, and the Housing Move-In Date. The difference in which review to use depends on your "Exit Date." If your client is still in a program, you would use the Interim review. After the client has exited the program, any updates must be done via the Follow Up review.

To the right of the "Project State Date" and "Exit Date" you will see the column named "Interims." Click on the "Interim" icon next to the entry you wish to add an Update for.

The screenshot shows the 'Client - (30) Potter, Harry' profile. The 'Entry / Exit' tab is active, displaying a table with the following data:

Program	Type	Project Start Date	Exit Date	Interims	Follow Client Count
SCHC Street Outreach (CM) (11)	HUD	01/16/2018			

A blue arrow points to the 'Interims' column header.

This will bring up the "Interim Reviews" pop up window. To add a new update, click on the "Add Interim Review" button.

The 'Interim Reviews' window displays the following table:

Review Date	Review Type	Client Count
No matches.		

A blue arrow points to the 'Add Interim Review' button.

At the "Add Interim Review" window, select "Update" from the "Interim Review Type" drop down menu. Click on the "Save & Continue" button.

Under Household Members, you have the option to add this update to multiple clients. (Typically the update will only be for the Head of Household.) Select **“Update”** from the “Interim Review Type” drop down menu. (If the client has moved into housing, update the Interim Review date so that it reflects the same date the client moved into housing.) Click “Save & Continue.”

This will bring up the **NorCal Update (2020) Assessment**. Scroll through the assessment and make any updates as needed. You can make updates to any of the four sub-assessments **Monthly Income**, **Non-Cash Benefits**, **Health Insurance**, or **Disabilities**. In addition you can update the questions on Domestic Violence and Coordinated Entry. If the client has moved into housing, you will notate this by entering the “Housing Move-in Date” at the very bottom of the Assessment.

Clicking on the First, Previous, Next or Last buttons allows you to scroll through the records to find the specific record you are updating. To update a record in one of the four sub-assessments, first find the specific record. Click on the Pencil Icon on the left hand side of the record open the “Edit Recordset” window.

**NorCal Update (2017)** Interim Review Date: 03/01/2018 12:00:00 PM

Income from Any Source: Yes (HUD)  G

**Monthly Income** HUD Verification

Monthly Amount	Source of Income
	Other (HUD)
	General Assistance (HUD)
	Child Support (HUD)
	Alimony or Other Spousal Support (HUD)
US\$100.00	SSI (HUD)

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



The “Edit Recordset” pop up screen will appear. It will show the information that was entered when the client was entered into the Project. (This information would come from the HMIS Intake form.) We will need to update the “End Date” to show that the client’s old income amount was valid from the Start Date to now.

**Edit Recordset - (30) Potter, Harry**

**Monthly Income**

Monthly Amount: 100 G

Source of Income: SSI (HUD) G

If Other, Please Specify:  G

Receiving Income Source?: Yes G

Start Date\*: 01 / 16 / 2018 G

End Date: 03 / 01 / 2018 G

Print Recordset Save Save and Add Another Cancel



In our example, the client has had an SSI income of \$100 from 01/16/2018 until the update on 03/01/2018. Click on the “Save and Add Another” button to save this record and start a new Income record from 03/01/2018. The “Add Recordset” pop up box will now appear. You can enter in the new monthly amount here. You will need to select the same “Source of Income” from the drop down menu. (In our example, the client’s SSI amount is increasing to \$400.) You will also need to update the “Receiving Income Source?” to **Yes**. The Start Date should automatically filled in to the same date as your Update. Click on the “Save” button to update the record.

**Add Recordset - (30) Potter, Harry**

**Monthly Income**

Monthly Amount: 400 G

Source of Income: SSI (HUD) G

If Other, Please Specify: [Empty Text Area] G

Receiving Income Source?: Yes G

Start Date \*: 03 / 01 / 2018 G

End Date: [Empty] / [Empty] / [Empty] G

Buttons: Save, Save and Add Another, Cancel

The **NorCal Update (2020) Assessment** will now reflect the history with both the old record and the new record. You will have to scroll through the various records, but you will be able to see separate records for the two different Income amounts. One for the amount (with the date range of 01/16/2018 to 03/01/2018) and a new record for the new amount going forward (for the date range 03/01/2018 forward).

**NorCal Update (2017)** Interim Review Date: 03/01/2018 12:00:00 PM

Income from Any Source: Yes (HUD) G

**Monthly Income** HUD Verification

Monthly Amount	Source of Income
US\$400.00	SSI (HUD)
	Worker's Compensation (HUD)
	VA Non-Service Connected Disability Pension (HUD)
	Unemployment Insurance (HUD)
	VA Service Connected Disability Compensation (HUD)

Showing 1-5 of 16 First Previous Next Last

**NorCal Update (2017)** Interim Review Date: 03/01/2018 12:00:00 PM

Income from Any Source: Yes (HUD) G

**Monthly Income** HUD Verification

Monthly Amount	Source of Income
US\$100.00	SSI (HUD)

Showing 16-16 of 16 First Previous Next Last

Click on "Save & Exit" at the bottom of the screen. This will take you back to the "Interim Reviews" pop up window. You can now see the record of the Update you just made.

**Interim Reviews**

**Interim Reviews Associated with this Entry / Exit**

Review Date	Review Type	Client Count
03/01/2018	Update	2

Add Interim Review

Showing 1-1 of 1

Exit

Click on the “Exit button” to return to the Entry / Exit tab. You will see a “1” has been added to the Interim icon. This number corresponds to the number of updates added in the system.

	Exit Date	Interims	Follow Ups	Client Count
				

## Adding a Follow Up Review

Adding a Follow Up Review is exactly the same as adding an Interim Review. The only major difference is that the Interim Review Date must be between the “Project Start Date” and “Exit Date” while the Follow Up Review has to be dated after the “Exit Date.”

	Exit Date	Interims	Follow Ups	Client Count
	04/02/2018			

After clicking on the Follow Ups icon, the “Follow Up Reviews” pop screen will appear. Click on the “Add Follow up Review” button.

**Follow Up Reviews**

Follow Up Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
No matches.		

From the Add Follow Up Review pop up screen, select Update as your Review Type. (Note that the project Exit Date is displayed in the Household Members section.) Click on the “Save & Continue” button.

**Add Follow Up Review - (30) Potter, Harry**

**Household Members**

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

(105) Other

(30) Potter, Harry (Exit Date: 04/02/2018 12:00 PM)

(32) Weasley, Ron (Exit Date: 04/02/2018 12:00 PM)

**Follow Up Review Data**

Entry / Exit Provider: SCHC Street Outreach (CM) (11)

Entry / Exit Type: HUD

**Follow Up Review Type \***: Update

**Review Date \***: 06 / 01 / 2018 12 : 00 : 00 PM

Save & Continue    Cancel

You will now be able to update any information in the Monthly Income, Non-Cash Benefits, Health Insurance, or Disabilities sub-assessments. This is the same process as the Interim Review.

After you have made all your updates, click on "Save & Exit" at the bottom of the screen. This will take you back to the "Follow Up Reviews" pop up window. You will see the Follow Up update you just added.

**Follow Up Reviews**

**Follow Up Reviews Associated with this Entry / Exit**

	Review Date	Review Type	Client Count
 	06/01/2018	Update	 1

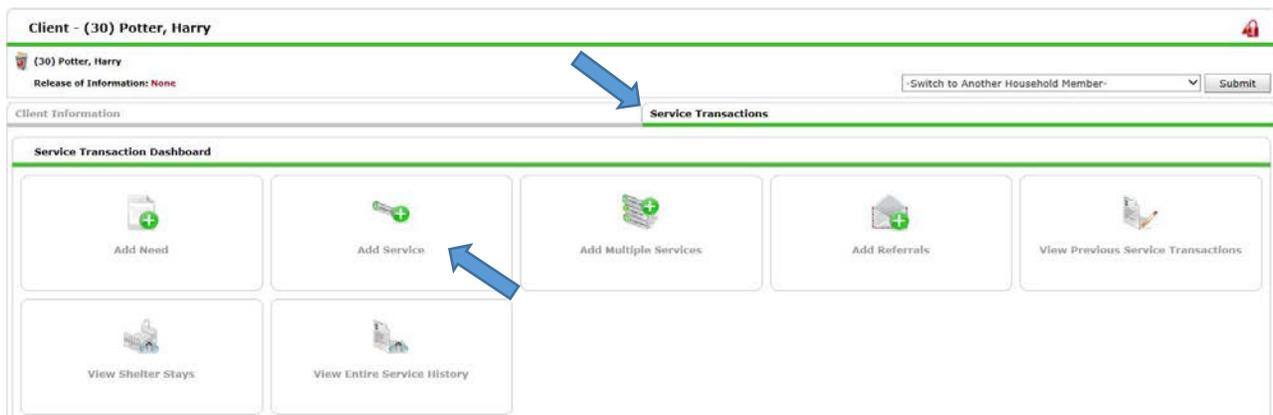
Add Follow Up Review      Showing 1-1 of 1

Exit

Exit Date	Interims	Follow Ups	Client Count
 04/02/2018	 1	 1	 2 

## Document Services Provided

If you provide the client with a service, you will need to make sure that you document this service in the HMIS system. Start by clicking on the **Service Transactions** tab located right behind the Entry / Exit tab. You will now be at the Service Transaction Dashboard. To add a service, you will want to click on the “Add Service” box. (Note: When you add a Service, the system will automatically add a Need to correspond the Service you are adding.)



Client - (30) Potter, Harry

(30) Potter, Harry  
Release of Information: None

Client Information **Service Transactions**

Service Transaction Dashboard

Add Need Add Service Add Multiple Services Add Referrals View Previous Service Transactions

View Shelter Stays View Entire Service History

Once on the “Add Service” screen, you will need to select any household members that you want to include in the service (if applicable). You will then fill in information about the service you are providing:

**Service Provider** – This defaults to your “Enter Data As” project. You can change this to a different project/program depending who is providing the service.

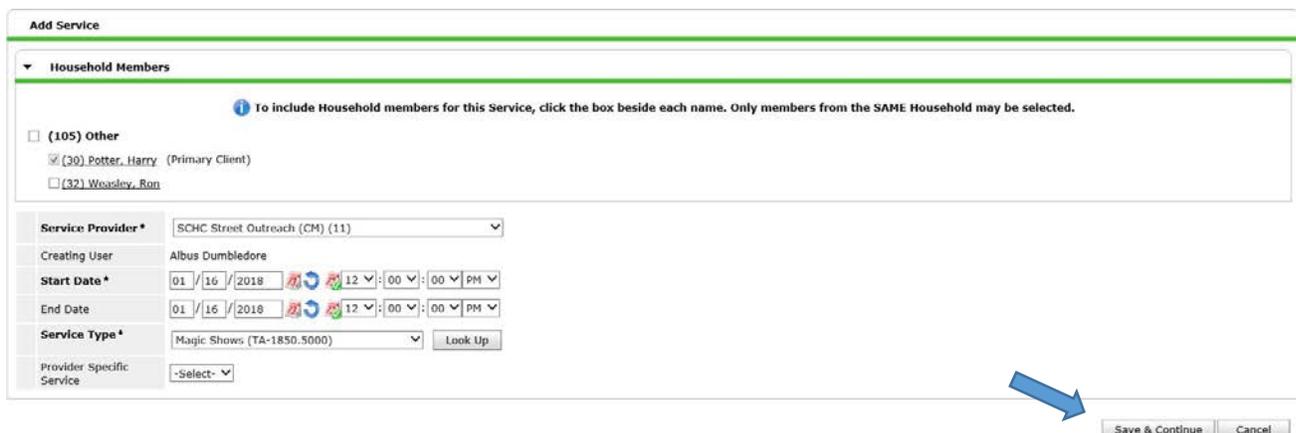
**Creating User** – This defaults to your name.

**Start Date** – Defaults to today’s date.

**End Date** – Select the date the service ends. Usually this is the same date as the start date.

**Service Type** – Select a service from the picklist values available. If you do not see the service from the picklist, please contact your HMIS Administrator to have it added for your Project.

**Provider Specific Service** – Leave blank



Add Service

Household Members

To include Household members for this Service, click the box beside each name. Only members from the SAME Household may be selected.

(105) Other  
 (30) Potter, Harry (Primary Client)  
 (32) Woasley, Ron

Service Provider \* SCHC Street Outreach (CM) (11)

Creating User Albus Dumbledore

Start Date \* 01 / 16 / 2018 12 : 00 : 00 PM

End Date 01 / 16 / 2018 12 : 00 : 00 PM

Service Type \* Magic Shows (TA-1850.5000) Look Up

Provider Specific Service -Select-

Save & Continue Cancel

Once complete, click on the “Save & Continue” button in the lower right hand area of the screen. This will take you to the Edit Service screen where you can notate specific information about the service.

There are several areas you will want to review. First is the space for “Service Notes” where you can notate specific information about this service. Second, there is a “Service Costs” section where you can track the cost associated for the service. Third, there is section called “Apply Funds for Service” where you can add a specific funding source that covered the cost of the service.

**Service Costs**

Number of Units	1
Unit Type	Item
Cost per Unit	\$
Total Cost of Units	\$ 50.00

**Apply Funds for Service**

**Funding Sources**

Source

Add Funding Source

You will also see a section where you can set a follow up. In the “Follow Up Information” section, you can set a follow up date for yourself that will show on your Follow up dashlet on your Home screen. When you set the date, it will automatically populate yourself as the Follow Up User. (Leave the Follow Up Made and Completed Follow Up Date fields blank. Those will be for when you close the follow up.)

**Follow Up Information**

Projected Follow Up Date: 03/15/2018

Follow Up User: SCHC Street Outreach (CM) (11)

Follow Up Made: -Select-

Completed Follow Up Date:

**Need Information**

Need Status: Closed

Outcome of Need: Fully Met

If Need is Not Met, Reason: -Select-

**Needs Status**

**Closed** = if service is completed. There should be an end date for the service. (I.e. rent or utility assistance, case management, etc.)

**In Progress** = If the service is an ongoing. There should NOT be an end date for the service.

**Identified** = This should only be used when identifying needs and you are unable to provide services for the client. (If only identifying a need, add a Need through the Services dashboard.)

Save Save & Exit Exit

Be sure to indicate the appropriate Need Status and Outcome of Need. (This should be “Closed” and “Fully Met” if we are providing a Service.) Once completed, click the “Save & Exit” button to save your service record.

## Exit the Client from a Project

A client should be exited from the project when they are no longer receiving services. Before exiting a client from your project, you want to update the need status to “Closed” for any needs that may still be open and list the end date for any assigned case manager.

Go to the client’s profile, click on the “Entry / Exit” tab at the top of the profile under the “Client Information” tab. This will bring up a summary of entry/exits that the client has had. To exit a client, select the desired entry by clicking on the pencil next to the blank exit date of the program.

The screenshot shows the 'Client Information' section for Harry Potter. The 'Entry / Exit' tab is selected, displaying a table with one entry for 'SCHC Street Outreach (CM) (11)'. The 'Exit Date' field is currently blank, and a blue arrow points to the pencil icon next to it. A reminder message states: 'Reminder: Household members must be established on Households tab before creating Entry / Exits'. The table has columns for Program, Type, Project Start Date, Exit Date, and Client Count.

This will bring up the “Edit Exit Data” pop up window. (If the client was initially entered in the project as part of a household, you will see the option to select the other household members for exit as well.) You will need to select the appropriate option from the “Reason for Leaving” and “Destination” drop down menus. If “Other” is chosen for either one, an explanation must be specified in the text box directly below it. Click on the “Save & Continue” button when you are done to move on to the **NorCal Advanced Exit (2020) Assessment**.

The screenshot shows the 'Edit Exit Data - (30) Potter, Harry' pop-up window. It has two main sections: 'Household Members' and 'Edit Exit Data - (30) Potter, Harry'. In the 'Household Members' section, there are three checkboxes: '(105) Other', '(30) Potter, Harry', and '(32) Weasley, Ron'. A blue arrow points to the '(30) Potter, Harry' checkbox. In the 'Edit Exit Data' section, the 'Exit Date' is set to 04/02/2018. The 'Reason for Leaving' dropdown is set to 'Completed program'. The 'Destination' dropdown is set to 'Rental by client, no ongoing housing subsidy (HUD)'. A blue arrow points to the 'Destination' dropdown. There are also text boxes for 'If "Other", Specify' and a 'Notes' text area. At the bottom, there are 'Save & Continue' and 'Cancel' buttons.

From the “Entry/Exit Data” screen, you will verify the any records and update them if necessary. You can update information on **Monthly Income, Non-Cash Benefits, Health Insurance or Disabilities**. There is also an **Optional**

**Exit Questions** sub-assessment where you can notate supportive services the client received while in the program.

Optional Exit Questions	
Start Date *	End Date
<input type="button" value="Add"/>	

You'll also see a space to record the housing move in date. (If the client is exiting the program due to completion this will probably already be filled in. If not, please ensure you have the housing move in date entered.)

Housing Move-in Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	   
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Once finished, please click on the "Save & Exit" button to update the exit from the program.

*Last Updated: 1/8/2020*