HMIS User Guide

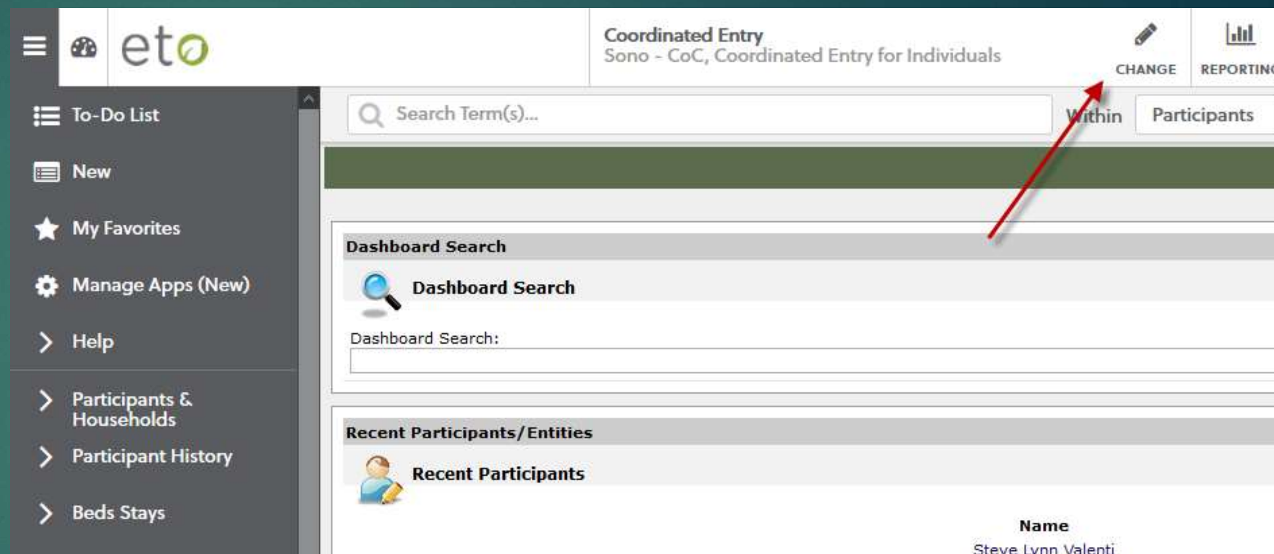
CURRENT AS OF 7/17/2020

New Users

- New user requests should be made to daniel.overbury-howland@sonoma-county.org and should include a completed New User Agreement form (See next page).
- Login here
- Username will be your email address as given on your new user agreement
- Password will initially be set as "Test123!"

HMIS Structure

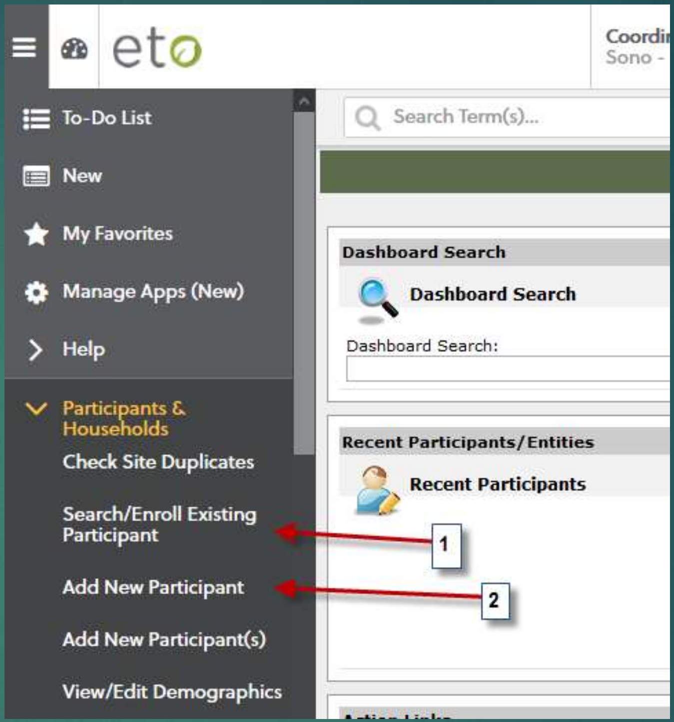
HMIS is structured as multiple sites with the possibility of many programs within a single site. Each provider has it’s own site and most run multiple programs within. You can switch sites and programs from any screen in HMIS.



It is important to remember that any data recorded in HMIS is tied to the site and program the action was taken in. Make sure you are in the appropriate program when recording any data for your clients.

Adding/Enrolling a Client

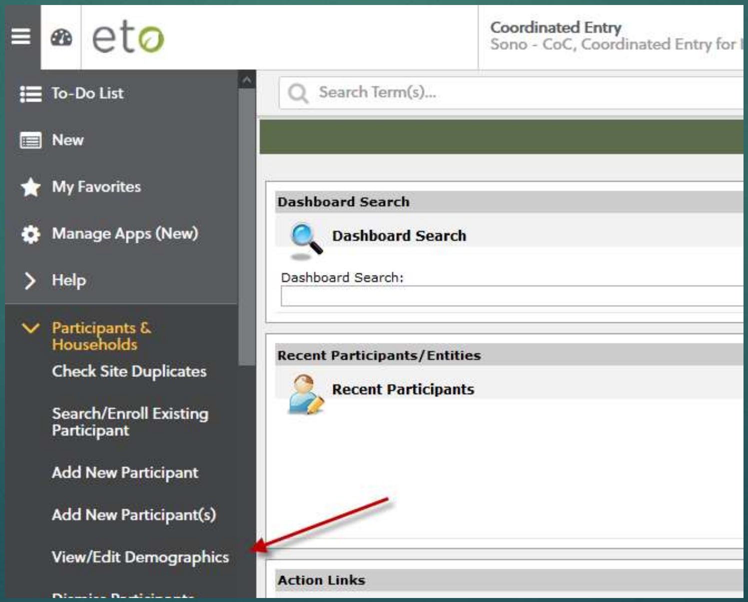
1. Search for an existing client in the system and enroll using past data.
2. Add a brand new client that has never been entered into HMIS.



When enrolling a client into your program, always check if that client has an existing record in HMIS before adding a brand new client. This helps cut down on duplicate clients.

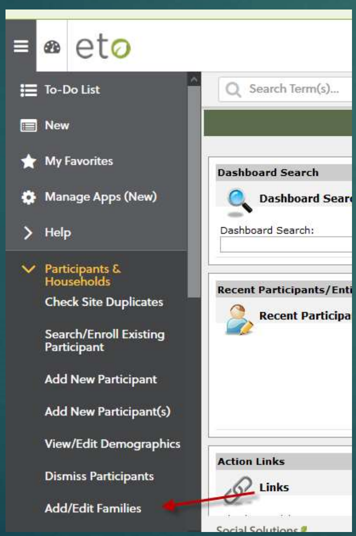
Demographics

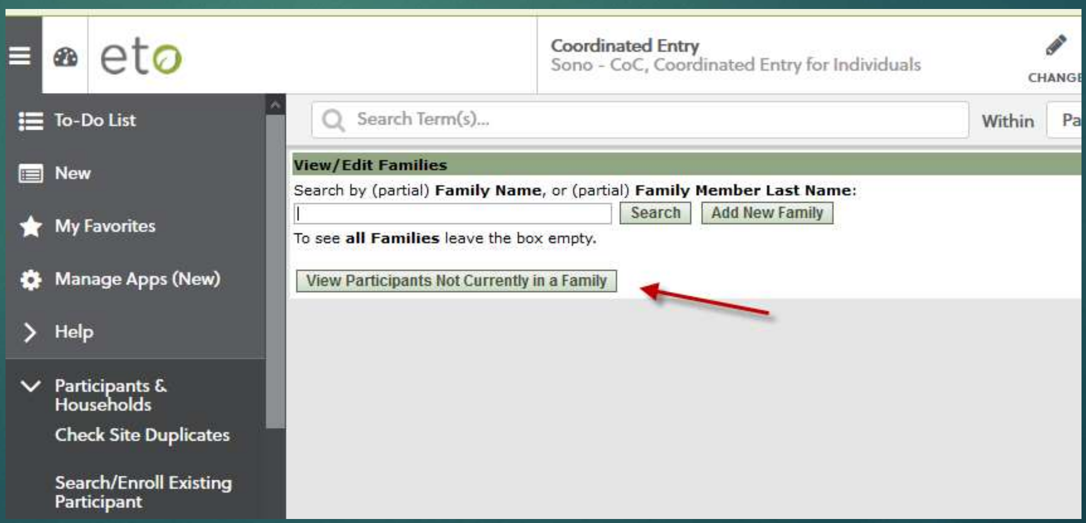
If you have updated information about a client you should update their demographics. This can be done via the ‘View/Edit Demographics’ button under the ‘Participants’ menu. Core/mandatory demographics are marked with a red star. Demographics should be updated at project entry, whenever you receive new information about your client, and reviewed annually (where applicable).



Families

Clients should all be in families. If the client is a single individual then they should be in a family of one. You can view all clients not in a family by navigating to the 'View/Edit Families' option under the 'Participants' menu and selecting the button 'View Participants Not Currently in a Family'. If a client appears on this list then you can fix the error by simply clicking on the name and creating the family.





Families Continued

If you are working with a family of 2 or more, you should create the family as described in the previous slide, starting with the head of household, and then you can add other enrolled clients as appropriate by viewing/editing the family and selecting 'Search for Others…'

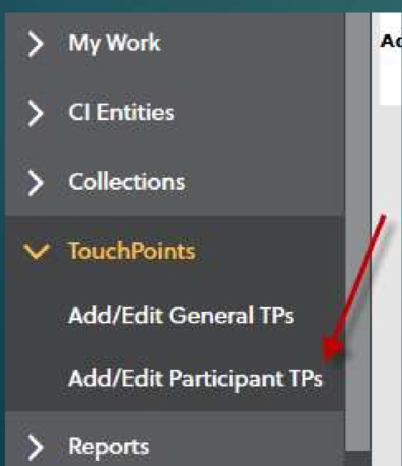
HUD Assessments

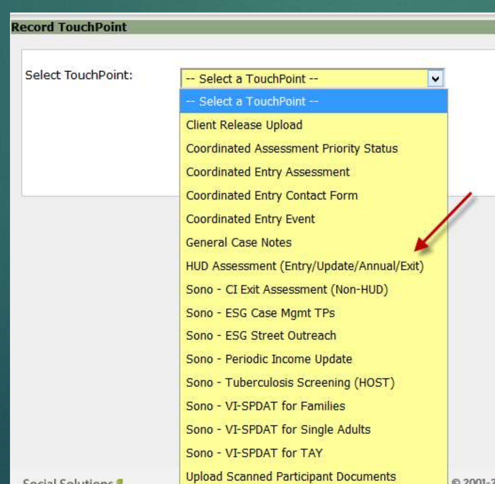
All clients must have HUD Assessments recorded at specific times during each program enrollment:

Project Start – Entry Assessment must be recorded for the date they were enrolled in the project

Project Exit – Exit Assessment must be recorded for the date they were dismissed from the project

Project Annual – If a client stays more than 365 consecutive days in a project, then they must complete an annual assessment on each anniversary of their project entry.



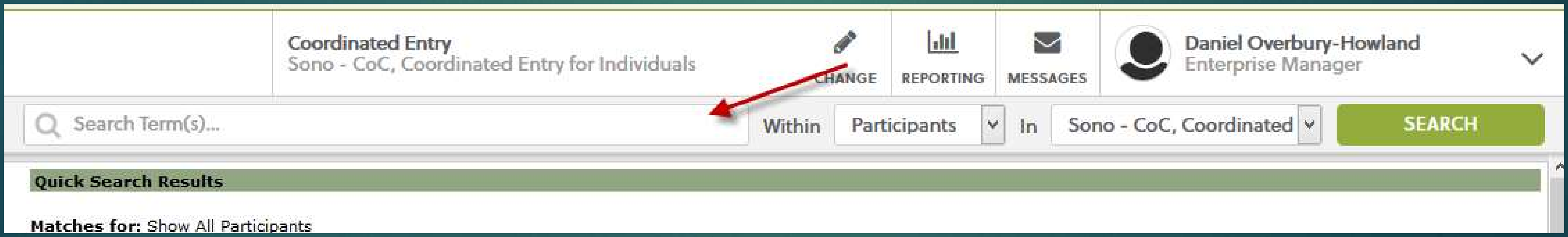


You can manually select a date when recording an assessment. The date you select must match the client's enrollment dates.

A Client enrolled 1/1/2015 – 3/1/2018 would need to have:
***Project Start** recorded on 1/1/2015*
***Project Annuals** recorded on 1/1/2016, 1/1/2017, and 1/1/2018*
***Project Exit** recorded on 3/1/2018*

Client Dashboards

You can view a lot of information on your client from their dashboard. Search for your client via the search bar at the top of any screen (a blank search will return all currently active clients), click on the the client you want to view, and click the dashboard option.



Data Requirements

To be compliant with HUD standards, all clients must be enrolled, have appropriate HUD Assessments, and be dismissed. Certain program types may require additional forms be completed. Below are some examples along with the program types that require them. This is not an exhaustive list – you should review your specific program's data requirements.

Outreach and Services Contact **(Street Outreach)**

Outreach and Services Engagement **(Street Outreach)**

Rapid Rehousing Assistance Provided **(Rapid Rehousing)**

Coordinated Entry Contact Form **(Coordinated Entry)**

VI-SPDAT **(Coordinated Entry)**

Dismissing a Client

When your client leaves your program and all required data has been recorded, you can dismiss them via the Dismiss Participants menu. Search for your client, select the appropriate Program End Date, and then click 'Dismiss Participant'.