



# HMIS User Training

Monday, September 14, 2015

3:00-4:30 pm

Department of Social Services, Room 101



# Agenda

- Welcome and Introduction
- Security and Confidentiality
- Browser Setup
- Household Member Case
- Intake and Exit
- Changes to HMIS in October 2015
- Data Completeness
- Annual Performance Report
- Q&A



# Other Items

- Need an account? No problem! Contact County staff
- Internet Explorer Browser Configuration – Steps available online
- Recorded session will be available for future reference
- Training documents are also available



# Security and Confidentiality



# Workstation Security

- Only you, the user, should be able to see your screen.
- If you are entering data while interviewing the client, the client is the only person who may view the screen that is applicable to them.



# Confidentiality

- Client-specific data from the HMIS system may be shared with partner agencies.
- Sharing of Information requires **INFORMED** consent by virtue of an posted notice of informed consent or a release of information form signed by client. **Informed consent can mean posted or signed.**



# Levels of Confidentiality

<p>Go! With consent</p>	<p>Basic demographic information:</p> <ul style="list-style-type: none"><li>• Name</li><li>• DOB</li><li>• SSN</li><li>• Gender, Race, Ethnicity, Vet status</li></ul>
<p>Proceed with Caution With Consent</p>	<p>Project level sharing between partners</p> <ul style="list-style-type: none"><li>• Coordinated Assessment</li><li>• Electronic referrals</li><li>• Document sharing</li></ul>
<p>STOP Requires special Consent</p>	<p>Special Needs conditions – Privacy standards Consider: Does identifying the service itself give away a special needs diagnosis?</p>



# Browser configuration



# Browser configuration

Use latest version of Internet Explorer (IE)

## Live Site

- <https://www.clientservicesnetwork.com/CSNSLO>

## Training Site

- <https://www.clientservicesnetwork.com/CSNSLOTrain>

Four tasks to complete to fully configure:

1. Pop-up Blocker Settings
2. Internet Options – Browsing History
3. Internet Options – Security/ Trusted Sites
4. Compatibility



# Household Member Case



Head of Household  
(self)



Spouse of  
Head of  
Household



Child of Head  
of Household



# Intake and Exit Case



# Intake

- Must add each family member, starting with head of household
- Save information as you go along
  1. Project Entry – Select correct project
  2. Enter Adult Clients into Project
  3. Special Needs at Entry
  4. Income at Entry (Adults)
  5. Child Medical Insurance at Entry
  6. Summary
  7. Release (of information – typically one year to unlock)



# Exit

- Exit is in the reverse order of Intake
- Exit individual household members, or all.
  1. Special Needs
  2. Income at Exit (Adults)
  3. Child Medical Insurance at Exit
  4. Summary
  5. Exit client from project
  6. Outcomes



# HMIS October 1, 2015 Critical Changes

- Universal Data Elements – Applies to all user groups/partner agencies:
  - Destination. All persons exiting the projects will be required to have an exit destination entered.
    - Change – previously only adults, now applies to every client.
  - Time on Streets/Emergency Shelters/Safe Havens
    - Enter approximate date started, if known – do not make a guess without asking client.



# Data Completeness

- Enter 'null' or 'blank' – Do not 'make something up' unless otherwise specified.
- Ensure data quality and accuracy by running a report check every month using the Reports menu.
- Back-fix any missing or erroneous data. Contact County staff to input the fixes.
- *Note:* Social Security Number reporting is extremely important – Serves as a unique identifier and is critical for funding.



# Annual Progress Report

Completeness of information = Better reporting for performance measures = More favorable outcomes for next year's grant cycle!

Program Period	June 1 – May 31	Nov 1 – Oct 31	Dec 1 – Nov 30
Project Name	<ul style="list-style-type: none"> <li>SLO City Project (CAPSLO/TMHA)</li> <li>South County SSO (CAPSLO)</li> </ul>	<ul style="list-style-type: none"> <li>HMIS</li> </ul>	<ul style="list-style-type: none"> <li>Permanent Supportive Housing projects</li> </ul>
APR Due Date	<ul style="list-style-type: none"> <li>August</li> </ul>	<ul style="list-style-type: none"> <li>January</li> </ul>	<ul style="list-style-type: none"> <li>February</li> </ul>



# Questions?



# Contact Us

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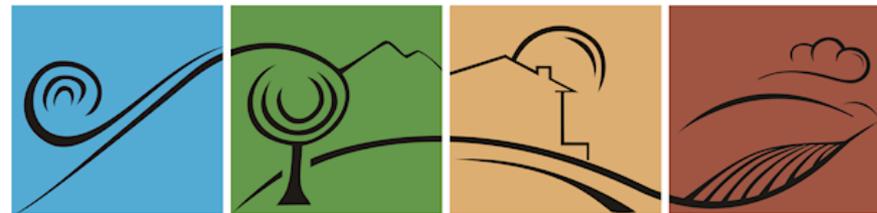
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