



# HMIS User Guide

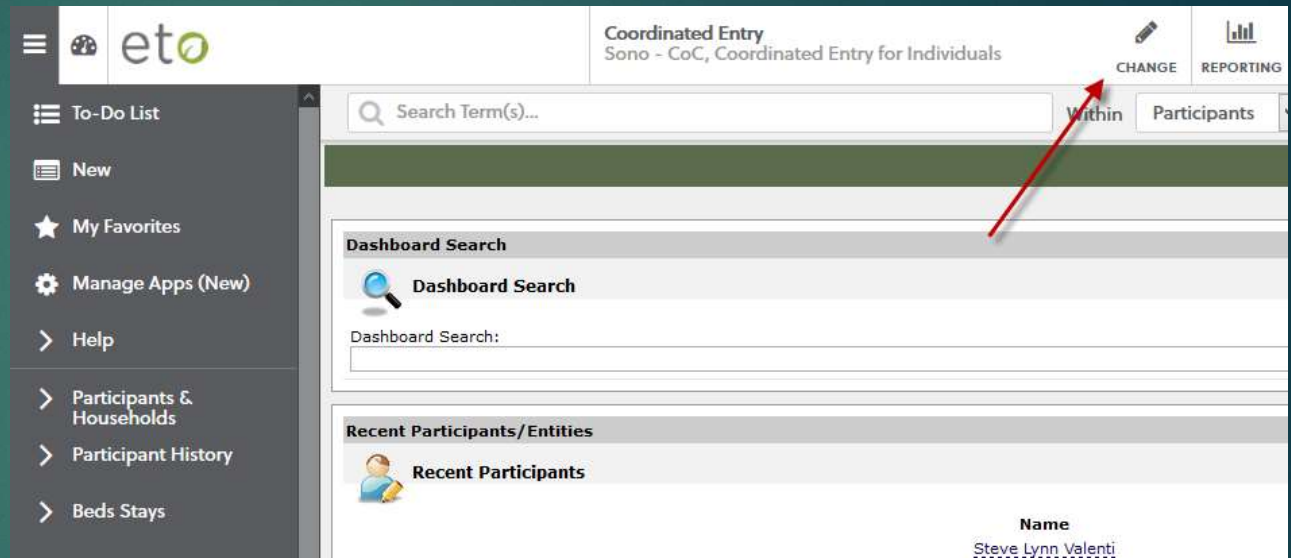
CURRENT AS OF 7/17/2020

# New Users

- ▶ New user requests should be made to [daniel.overbury-howland@sonoma-county.org](mailto: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

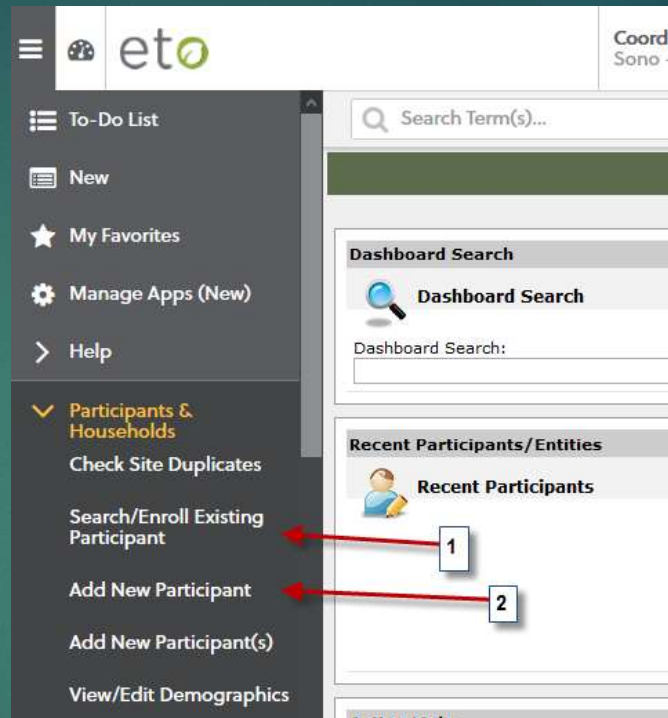
HMIS is structured as multiple sites with the possibility of many programs within a single site. Each provider has its own site and most run multiple programs within. You can switch sites and programs from any screen in HMIS.



*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

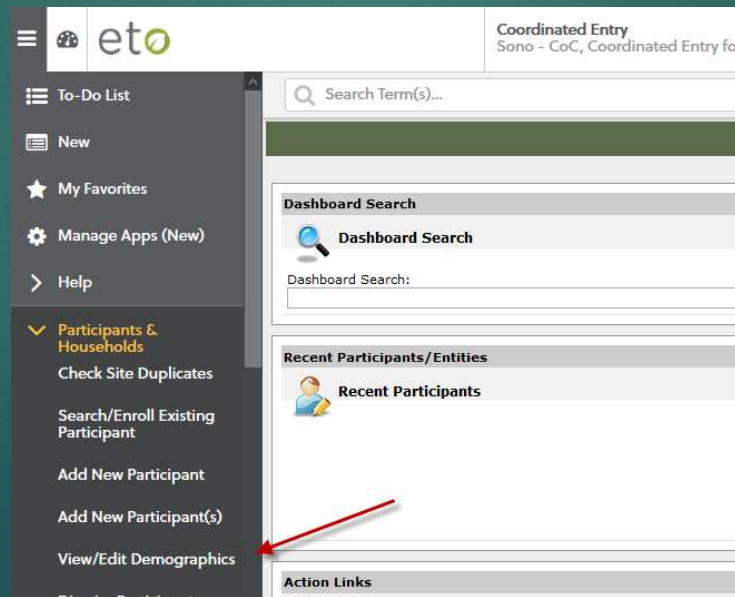
1. Search for an existing client in the system and enroll using past data.
2. Add a brand new client that has never been entered into HMIS.



*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.*

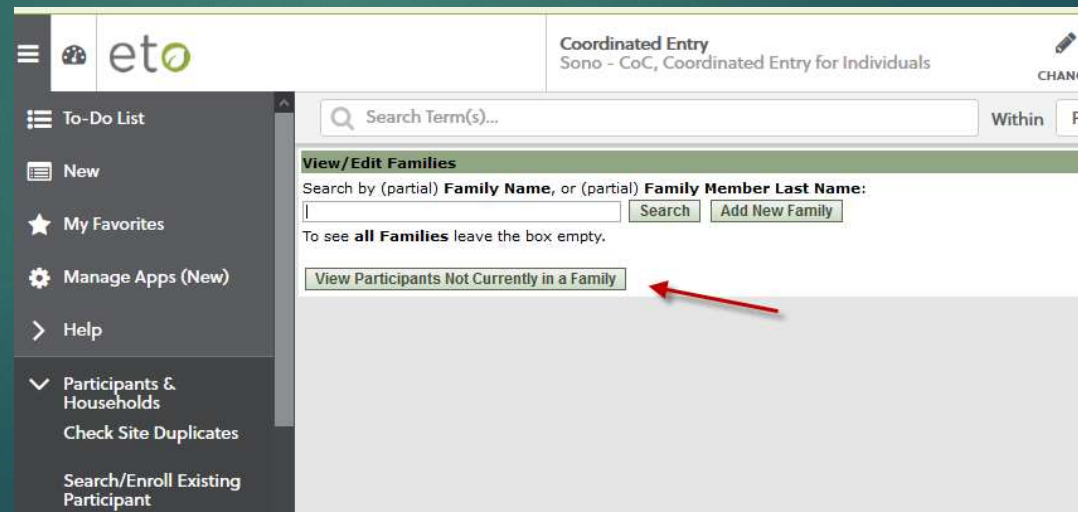
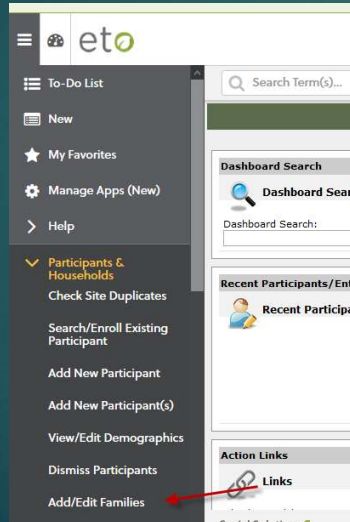
# Demographics

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...'

The screenshot shows a web application interface for managing families. At the top, there is a search bar with the text "Search Term(s)..." and a "SEARCH" button. Below the search bar, there are dropdown menus for "Within" (set to "Participants") and "In" (set to "Sono - CoC, Coordinated").

The main content area is titled "View/Edit Family: [redacted] Family". Below this title, there are several buttons: "Edit Family Name", "Delete Family", "Disable Family", "View Program History", and "View Composition History".

Below the buttons is a table with the following columns: "Family Member", "Age", "Date of Birth", "Relationship", and "Take Action".

	Family Member	Age	Date of Birth	Relationship	Take Action
1	[redacted]	[redacted]	[redacted]	Self/Head of Household	Head of Family   Delete

At the bottom of the interface, there is a section titled "Add New Members to Family: [redacted] Family" with two links: "Search for Others..." and "Add New Family Member".

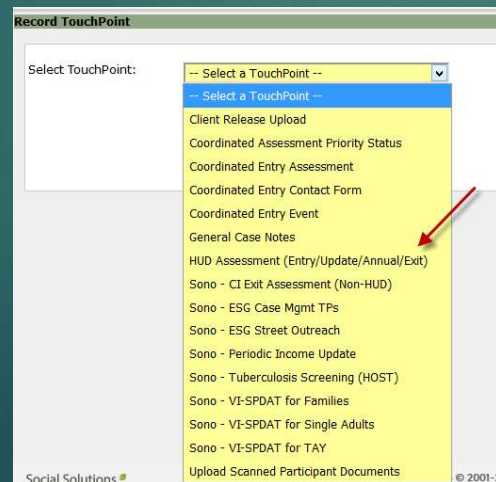
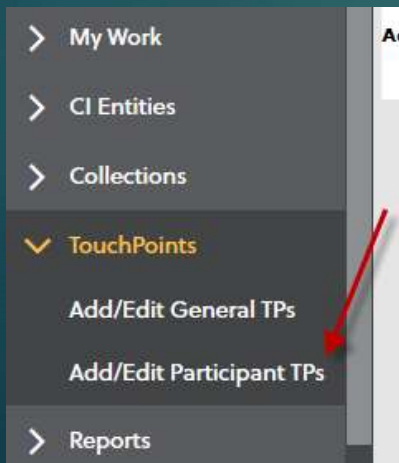
# HUD Assessments

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

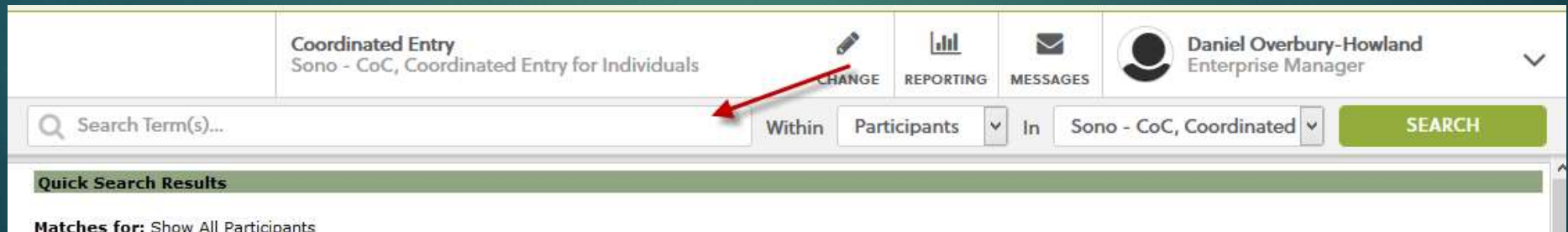
**Project Annuals** recorded on 1/1/2016, 1/1/2017, and 1/1/2018

**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.



The screenshot displays a client dashboard interface. At the top, the client name "Coordinated Entry" is shown with the subtitle "Sono - CoC, Coordinated Entry for Individuals". To the right of the client name are icons for "CHANGE" (pencil), "REPORTING" (bar chart), and "MESSAGES" (envelope). Further right is the user profile for "Daniel Overbury-Howland", Enterprise Manager, with a dropdown arrow. Below this is a search bar with the placeholder "Search Term(s)..." and a green "SEARCH" button. To the left of the search button are filters: "Within" (with a red arrow pointing to it), "Participants" (with a dropdown arrow), "In", and "Sono - CoC, Coordinated" (with a dropdown arrow). Below the search bar is a section titled "Quick Search Results" and a link "Matches for: Show All Participants".

# 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**)

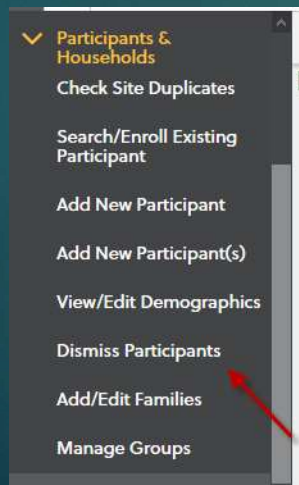
Rapid Rehousing Assistance Provided (**Rapid Rehousing**)

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'.



Enter search criteria or select participant(s) to dismiss or enter dismissal information in multiple periods

Last Name:

First Name:

or

SSN:

or

Case Number:

or

Family Name:

Below are all Participants who are currently enrolled in **Sono - CoC, Coordinated Entry for I**

<input checked="" type="checkbox"/>	Participant	Age	Case Number
<input checked="" type="checkbox"/>	Client [REDACTED]	[REDACTED]	[REDACTED]

Page size: 25 1 items in 1 pages

\* Program End Date:

Dismissal Reason: -- Select --