

KC Metro HMIS New User Guide

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Introduction

HMIS (Homelessness Management Information System) is an electronic data collection database storing client-level information about persons who access homelessness programs.

HMIS provides information about client needs, goals, and service outcomes. The content in this user guide will provide information on the basic features of CaseWorthy (HMIS software) and guidance on your day-to-day data entry, as well as helpful case management tools to optimize your services and time.

Review your Provider and Role

When you log in, review your Provider and Role

It is important for enrollments to be tied to the correct Provider and your view in HMIS changes depending on the Role you log in as.

Nav Path: Upper right-hand corner

Check for Duplicates

Always search if client has an existing record in HMIS.

Search for the client in HMIS to avoid creating duplicate records.

Nav Path: Left Menu > Find Client

- Do a partial search by only typing the first **3** letters of the client's F Name and first **3** letters of the L Name.
- Search for HoH first followed by other adults and older youth in the household that may have records in HMIS.
- Add the percent sign (%) to broaden your search. The % tells the system that the client's name may not start with "Mahomes" but it's somewhere in the name field.
 - Example: %Mahomes will show results for—
 - **Mahomes**
 - Kelce-**Mahomes**
 - Reid**Mahomes**
- Try different search combinations before creating a new client record. Reverse F name and L name, search for client's maiden/married name, use SSN (careful if there's not an exact match)
- The steps above are to prevent duplicates. If you create or find a duplicate, please email hmishelpdesk@marc.org to resolve the issue.

Enroll Clients in Program

After you checked for duplicates, you are ready to enroll clients in a program.

Workflow to enroll new or existing clients in a program

Nav Path: Left Menu > Add Client > HMIS Intake

- Always start with Add Client in the Left Navigation menu to launch the workflow which guides you step by step on the data collection need to complete the enrollment.

- If the client has a record in HMIS, select the **existing** client record and add the new program enrollment.
- If the client does not have a record in HMIS, and you searched using the different methods mentioned above, go ahead and select **This is a new client** in the lower right button after completing a second Duplicate client check on the first page of the workflow.

Data Quality

No one is perfect and it's okay. It's important to review your work after entering in HMIS and make any corrections if needed. Below is a list of the most common edits.

Check your work! Data Quality Editing and Corrections are very important.

Edit Program Enrollment Date. HH enrollment based on HoH and only 1 program enrollment per HH.

Nav Path: Case Management > Project Enrollment > Gear > Edit > Save

Edit Member Enrollment Date. Each family member's date of enrollment in the program.

Nav Path: Case Management > Project Enrollment > Gear > Member > Add/Edit Members > Click on the checkmark on the left side of the client's name > Edit > Save

Edit Assessment Date. Assessment date needs to match Member Enrollment date.

Nav Path: Assessments > HUD Universal > Click on assessment date > Click Assessment bar to see list of assessments > Edit (pencil on the right side) > Update information > Save

Edit Assessment Data

Nav Path: Assessments > HUD Universal > Click on the date > Edit data > Save

View Assessment Data

Nav Path: Case Management > Project Enrollment > Status > Enrolled > View Assessments > Select the assessment you want to view and review the data

One-Time Fields (RRH, PSH, SO)

RRH, PSH—Move-in Date

Clients are considered unhoused until the Move-In Date is entered.

Nav Path: Case Management > Project Enrollment > One-Time Field (box) > Enter date > Save

Street Outreach—Date of Engagement

The date when an interactive client relationship results in a deliberate client assessment or beginning of a case plan.

Nav Path: Case Management > Project Enrollment > One-Time Field (box) > Enter date > Save

Additional Functionality

Below are additional features in HMIS that you need to know.

Creating Annual/During Assessments

Nav Path: Case Management > Project Enrollment > Status > Complete annual assessment/New during assessment. Annual assessments are due 30 days before or after the HoH's Start Date anniversary.

Exiting HoH/HH from program enrollment

Nav Path: Case Management > Project Enrollment > Status > Complete Exit Assessment

Add new family member to the HoH's existing enrollment

Nav Path: Case Management > Family and Contacts > Add and Enroll Family Member

Exiting one family member from the HoH's program enrollment

Nav Path: Case Management > Program Enrollment > Gear > Member > Complete Exit Assessment

Privacy and Security are Everyone's Responsibility!

- Never share your HMIS username and/or complex password
- Never save your HMIS password to your browser
- Use client IDs only and not send Personally Identifiable Information (PII: name, initials, DOB, SSN, etc.)
- Crop out PII of any images (screenshots) before sending them to Help Desk
- Only view data in HMIS if it is necessary
- Report any suspected violations or incidents
- Store signed HMIS Releases of Information and all documents in locked areas
- Post an HMIS Consumer Notice: Use of Personal Information at the data collection site
- Post an HMIS Privacy Notice at your agency

HelpDesk

Need help? Email the HelpDesk hmishelpdesk@marc.org

- Describe your issue
- List the client ID(s)
- Include the navigation path you used to get to the screen where you experienced the problem
- Provide screenshots without any Personally Identifiable Information (PII)
- Expect a response between 24 and 48 hours

KC Metro HMIS Website

Visit our website at www.kcmetrohmis.org to view resources, training material, submit a support ticket, and more!

Quick Reference Guides

Quick Reference Guides (QRG) are short 1–8-page documents that provide concise practical information and advice on specific topics. Sometimes known as “cheat sheets” quick reference guides are designed for users who know the material or task but need something in front of them to remind them of the steps. For QRG and more resources, visit our website at <http://www.kcmetrohmis.org/qrg.htm>