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SSVF/VA Workflow

Enter Data As	
	After logging into HMIS, go to the right-hand side at the top and click on “Enter Data As”
	Click on the Green Plus sign next to the applicable Project for which you will be entering the client/household.

If you are adding a new family (i.e. household), add the head of household first.

Client Search	
	On the left-hand side of the screen, click “ClientPoint” to begin searching for your client’s name. You must search for an existing client prior to adding a new client.
	If there is a match, click on the pencil to the left of the client’s name.
	If there is no match to the client’s name, add the Social Security Number and search again.
	If there is still no match, choose “Full SSN Reported (HUD)” from the drop-down list to the right of Social Security Number Data Quality.
	Define the Veteran Status of the client.
	Click “Add New Client with This information”
	The system will ask you again if you would like to add a New Client to the system, click “OK”.

NOTE: Tabs in HMIS are laid out in a certain order to help users remember the correct workflow. The goal is to move from left to right along the tabs.

Also, if you need to edit the client’s name, social security number or vet status, utilize the client profile tab to do so.

Client Profile	
	Click on the “Client Profile” tab.
	Client on the pencil next to the sub heading “Client Record”.
	Edit the name, SS# and Vet status as necessary
	Click “Save”.

NOTE: Scroll down the screen to locate the sub heading “Client Notes”, “File Attachments”, and “Incidents”. If at any time, you need to add a statement of homelessness, client case notes, or incidents that occur at our agency such as a ban rule, please add here.

Households (skip if client is single) This tab allows you to see current household members, those that have been added, other household associations, previous associations, and household profile information.	
	NOTE: *If an old household appears, but is not your client's current household situation, please DO NOT add a new household. We will manage an existing household as we move though the data entry process.*
	NOTE: *You MUST search for all clients in the household before you add a new client. Once you have searched all other household member and your household is built. You are able to move on.*
	NOTE: *Once a household is created, that household can NEVER be delete or removed from KYHMIS. Please be very careful when creating new households and double checking when searching for each household member. New households should only be created when no existing households can be located.*

NOTE: Release of Information is better known as an ROI. This release allows information to be shared from Project to Project within an agency or across agencies. You can upload a physical copy of the release of information for clients in KYHMIS, but agencies must have one on file. Also, the head of household or other adults in the household can sign releases for under 18 year old dependents, however EVERY adult must have their own individual release. Also, each adult can decide on the type of release they would like and information can be shared at different levels. Please contact your system administrator for further questions. Clients that do not wish to share information must have their records "locked".

ROI (Release of Information)	
	Click on the "ROI" tab.
	Click on "Add Release of Information".
	NOTE: The system will show all the households this client is associated with, that is why we DO NOT create new households with clients in exiting household.
	Locate the correct household, and click the box to indicate which members are covered by this particular release.
	NOTE: A release can cover the entire family if there is only one (1) adult and several children. Or it may cover one adult and all children, leaving the other adults in the household to give their own release. Make sure to select the appropriate choice.
	Find the search button located next to your provider name. This button can be used to add an ROI to multiple Projects within an agency or group of agencies. For example, if a person is receiving services or being referred to other Projects within your agency, you can save time and assign the ROI for all the Projects one time.
	Click "Search".
	Click the green plus buttons for all providers you would like to include under the ROI.
	Click "Exit" The providers included in the release are now shown under provider.
	Release Granted MUST always be marked "yes" even for VA-SSVF projects.
	Clearly state the end date for the release which can be at the agency discretion but will need to cover the entire time the client is participating in the Project. All releases must have an end date. The end date CAN NOT extend past 365 days of project entry (1 year).
	Click "Save Release of Information" The system will take you back to the main ROI screen and you will see all the Projects a ROI has been granted for.

NOTE: It is important to always have a correct start and end date for the client's/household's participation in the project. This tab is also used to update information using interim assessments.

Entry	
	Click the "Entry / Exit" tab.
	Click "Add Entry / Exit".
	Click "Include Additional Household Members".
	NOTE: All households associated with that client will appear. Make sure to check the boxes of the correct household members in order to include them in the Project entry. If you are including all members, simply check the box next to the household I.D. ***If the client is single, skip this step.***
	Select the entry type "VA" – MUST ALWAYS BE VA.
	NOTE: Make sure the provider is correct, the type of entry is always VA, and the time and date are reflective of the date the client/household entered the Project
	Click "Save and Continue".
	Complete entry assessment questions for each member of the household. After each member click "Save". Click on the next member to complete and then click "Save". ***NOTE: if you do NOT see assessment questions, contact your HMIS Administrator***
	NOTE: After each member is complete, their check mark will appear green.
	Click "Save and Exit" when complete.

Case Managers	
	Click on "Case Managers" tab.
	Click "Add Case Manager".
	Check the boxes of the client/household that will have this case worker. Households can have more than one case worker. If it is the entire household, simply check the box next to the household I.D.
	Select the type of case worker. It may be another KYHMIS User, it may be yourself, and it may be other staff member.
	NOTE: If this is yourself and information does not appear or it is another HMIS user and their contact information does not appear, please contact your system administrator.
	Click "Add Case Manager".

NOTE: This is an optional step for VA-SSVF projects.

Case Plans	
	Click on “Case Plans” tab.
	Click on “Add Goal”.
	Check the boxes of the client/household members that will share this goal. If it is the entire household, simply check the box next to the household I.D.
	NOTE: It is reasonable to consider that different members of the household will have different goals. Most likely children will not have their own individual goals but the head of household will take on the household’s goals. There may be specific goals for each adult in the household.
	Complete goal information.
	Click “Add Goal” when complete.
	NOTE: The screen will prompt you to add action steps that are planned and also service items attached to this goal.
	Click “Add Action Step” and complete information.
	Click “Save Action Step”.
	Click “Add Service” – DO NOT use “Add Multiple Services” for a goal.
	NOTE: The system will prompt “This will close the Goal popup and take you to the Service Transactions page.” Click “OK”. We do want services or referrals for each goal.

NOTE: Services are often added throughout the Project stay. If the Project would like to add services that are not associated with a goal, simply search client, open record, click on “Service Transactions” tab and follow the steps below.

Mandatory for SSVF Projects

Service Transactions	
	Use "**Add Multiple Services**": Check the boxes of the client/household that will be included as a benefit from this service. If this is based on a goal it should include the same members that the goal was for. **Any time there is rent, mortgage, or utility financial assistance paid, it does apply to the entire family.** If it is the entire household, simply check the box next to the household I.D.
	Pick the correct service.
	NOTE: Make sure to check the household members at the top of the page to see if everyone is added or if someone is added to this service that should not be.
	Check the end date for the service. All services MUST have end dates and they must be after the start date.
	Click "Save and Continue".
	Complete the type of VA-SSVF Service, VA-SSVF Financial Assistance Type and VA-SSVF Financial Assistance Amount if applicable.
	Enter the total cost for service/units and the unit type.
	NOTE: Support Documentation and Follow-Up Information is for agency use and not necessarily be related to services. Projects can skip if they choose.
	Complete the "Need Information" specifically in reference to this service. If this was a goal, the need will automatically fill in. If you have fulfilled that need, you will need to close the need.
	Click "Save and Exit".

NOTE: Interims are used to update income, non-cash benefits, health insurance, and disabilities while the client is active in the project. Interims can only be conducted when a client is active in a Project. The system will prompt you if the dates do not match with the entry or exit of the client.
DO NOT update information on an entry screen. Entry screens only reflect the client status as of entry, not during or after the client/household's participation in the Project.

	Interims ***(Updating Active Client Data)*** ***(Annual Re-certifications)***
	Search for the Client or use Client I.D. to open the record.
	Click on the "Entry / Exit" tab.
	NOTE: You will see the entry into your Project and may see entries into other project. Find the "Interims" column on the sub headings (to the left of the Exit Column).
	Click on the notepad icon under the sub heading interim for the correct project entry.
	Click "Add Interim Review".
	Check the boxes of the client/household that will be included in this review. Households can be reviewed together or adults can be reviewed separately. If it is the entire household, simply check the box next to the household I.D.
	Select the type of "Interim Review Type". This can be an update or an annual assessment.
	NOTE: Make sure the provider is correct, the type of entry is always VA, and the time and date are reflective of the date the client/household entered the Project.
	Click "Save and Continue".
	Complete data entry for each member of the household that is included in this review. After each member click "save" Click on the next member to complete and then click "Save" ***NOTE: After each member is complete, their check mark will appear green.***
	Click "Save and Exit" when complete.
	NOTE: A #1 will appear in the interim column of the entry/exit line in which you just added the interim. This #1 will change with the number of interim assessments that are complete while the client/household is in the Project.

Exit	
	Search the client or use the client I.D. to locate the head of household record.
	Click on “Entry / Exit” tab.
	Find the correct entry for the Project and then locate the pencil in the column with the sub heading of “Exit Date”.
	Click the pencil.
	Check the boxes of the client/household that will be included in this exit. Households can be exited together or certain members can leave before others. If this exit is for the entire household, simply check the box next to the household I.D.
	Complete the information regarding the reason and destination of the client/household.
	NOTE: All persons exited together will have the same reason and destination. If they do not, do not exit them together on this screen, go into each client’s record and exit them individually.
	Click “Save and Continue”.
	Complete data entry for each member of the household. You will notice that only those household members exiting will appear on the left side of the screen for a choice in entering information. After each member click “Save”. Click on the next member to complete and then click “save”.
	NOTE: After each member is complete, their check mark will appear green. This information must reflect the client’s status when they exited the Project.
	Click “Save and Exit” when complete.