

The City and County of San Francisco

HMIS User Guide

Entering Participant Information

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I. Introduction

A Homeless Management Information System (**HMIS**) is a database that collects information about programs offered by local service providers, the types of services available, and the individuals being served. Using all this information HMIS connects individuals to the program, or programs, they are participating in and generates program outcomes.

San Francisco uses Efforts to Outcomes (**ETO**) as the provider of HMIS software. The full San Francisco ETO site, containing all of the information about local service providers and their programs is called the **Enterprise**, or the SFHMIS Enterprise.

This guide covers the steps for entering and updating participant information at program entry, annual assessment/update, and program exit.

If you have any questions as you review the information in this guide, please refer to the Frequently Asked Questions (FAQ) at the end of each section. If the information you need isn't in the FAQ, check in with your manager.



Before you add any information to HMIS make sure that all enrolled adults have signed a *Release of Information (ROI)*.



II. Adding a New Program Entry

There are four basic steps to adding program entries to the HMIS database:

Step 1: Participant Search

Step 2: Create Family and Participant Records

Step 3: Create a Program Entry

Step 4: Add a Project Entry TouchPoint Assessment

Step 1: Participant Search

Before attempting any operation in HMIS, always check to make sure that you are in the appropriate site and/or project within ETO if you have access to more than one site and/or project.

ETO defines individuals receiving services as ***Participants***. Participant Search is the first step of any actions taken in ETO, e.g. before Adding a Program Entry, Completing TouchPoint Assessments, etc.

It's a good idea to keep some note paper and a pen handy to keep track of Case Numbers and other pieces of information as you move through this process.



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- A. To search, click on the word “Participants” on the Navigation Bar (the list of options on the right hand side of the screen).



If you do not see the Navigation Bar, click on the arrow tab (black oval) to expand it.

- B. This will open a drop-down menu under the word “Participants.” From here, click on “Find Participant.”



C. There should now be a search box on the screen as shown below.

D. Search for participants using the name, SSN, or case number. You may enter partial names or numbers in order to search. **In fact – you’re likely to get the best results when you enter only partial search criteria.**

If you’re searching with a partial SSN, the search will only recognize the **beginning** of the number (see search options below).

Searching for the last four digits of the SSN will not return the desired results. Use the first three instead.



Search Options: Enter any of the following to find this person.
Options in **BOLD** are recommended.

<u>Participant Name:</u> Testy McTesterson		<u>SSN:</u> 123-45-6789
Search by Name	– OR –	Search by SSN
1. Testy McTesterson		4. 123-45-6789
2. Te Mc		5. 123-45
3. T M		6. 123

- E. If your participant search turns up one (or more) existing participant record(s), the screen will display all matches to your search criteria. The criteria you entered will be in **bold**.

Tip! → If your participant is not on this list, try another search criterion (e.g. if you searched by SSN, try searching by name).

Search for Participants Across Site

Search for All Participants by (partial) Last Name, SSN or Case Number:

You must provide a (partial) Last Name to limit scope of results.

Matches for: **First Name & Last Name**

S.No	Name	DOB	SSN	Case No.	
1.	<input type="button" value="Go"/> Mc lin, Terry	2/10/1979	unknown	61107	Currently Dismissed
1.	<input type="button" value="Go"/> Mc Testerson, Testy	1/23/1945	123-45-6789	87099	Currently Enrolled

- F. If your participant doesn't turn up after searching by both name and SSN, it's likely that the person is not already in HMIS. You will need to add the participant, and the relevant program information in to ETO. If the household is a single person with no children, move on to **Step 2: Create Family and Participant Records** on page 12 for instructions.
- G. Repeat items D and E for all members of the household you need to enroll.
- H. If your participant is listed in your search results, make a note of the **Case No.** as you will use this number to add or update information in ETO. A Case Number is assigned to each participant by ETO. (Note: In other systems this is sometimes called a unique identifier.)

Search for Participants Across Site

Search for All Participants by (partial) Last Name, SSN or Case Number:

You must provide a (partial) Last Name to limit scope of results.

Matches for: **First Name & Last Name**

S.No	Name	DOB	SSN	Case No.	
1.	<input type="button" value="Go"/> Mc lin, Terry	2/10/1979	unknown	61107	Currently Dismissed
1.	<input type="button" value="Go"/> Mc Testerson, Testy	1/23/1945	123-45-6789	87099	Currently Enrolled

- I. Click the “Go” button next to the name to open the participant’s View/Edit profile.
- J. The participant’s profile will show all of the demographic information currently in HMIS and is the screen where you will make any needed changes.

The term **Demographics** is used to refer to characteristics that identify a person, or group of people, e.g. race. In HMIS the term demographics also includes personal identifying information, e.g. Social Security Number (SSN). HUD collects these demographics in HMIS to help understand who is accessing services.

There are more than twenty demographics that are entered into HMIS but we’re going to focus on the nine listed below. Most of this information will only need to be entered once. However, items like the Address may change frequently.

HUD Demographics to Verify

- | | |
|---------------------------------------|-------------------|
| 1. Name (First, Middle, Last, Suffix) | 6. Gender |
| 2. Social Security Number (SSN) | 7. Veteran Status |
| 3. Date of Birth (DOB) | 8. Marital Status |
| 4. Race | 9. Address |
| 5. Ethnicity | |

- K. Review all of the demographic information displayed for accuracy. You may need to scroll down to see everything. If any demographic information needs to be updated, check in with your manager.

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View Participant

[Audit Report](#) [Program History](#) [View Testy McTesterson's Dashboard](#)

Status: **Currently Enrolled**

First Name
Testy

Middle Name
R.

Last Name
McTesterson

Suffix
--Select--

Address 1
123 Main St

Name Data Quality (HUD)
Full Name Reported

Address 2
Apt A

DOB Quality (HUD)
Full DOB Reported

- L. If everything looks good, click on the “View Dashboard” button.
- **NOTE:** If you get a message asking you “Are you sure you want to leave this page?” go ahead and click the “Leave the Page” button.
 - **NOTE:** However, if any demographic information needs to be updated, then you must access the View/Edit participant screen to make/save any updates: **Click ‘View Dashboard’ button > Click View/Edit Participant link > Make any corrections/updates > Click ‘Save’ button.**

The **Dashboard** is a quick summary of the participant activity in HMIS. You’ll be able to view participant information, family information, and details about recent TouchPoint Assessments. For now, we’re going to focus on the Family Information, which is on the lower right side of the screen.

Testy R. McTesterson's Dashboard

Recent TouchPoints [1]

Testy R. McTesterson's Recent HUD Assessment (Entry/Update/Annual/Exit)

There are no recent TouchPoints for this participant.

+ New

Participant Information | Recent TouchPoints [2] | **Family Information**

Here's a blown up version of the family information. We can see that our participant is currently part of a family with two other members.



M. If the family record shown matches the household composition of the participants you are enrolling, you can skip to the **Create a Program Entry for Existing Participants** section on page 27.

N. If you need to add one or more new participants to the existing family, skip to the **Enrolling a New Participant as part of an Existing Family** section on page 17.

– OR –

O. If you need to add a new family with new participants, proceed with **Step 2: Create Family and Participant Records** on page 12.

➤ **NOTE:** Every participant, regardless of household type, **must** be entered as a member of a Family Household in order for the system to tabulate project data appropriately for reporting purposes. In HMIS, a Family Household can be comprised of *one or more* persons. A single adult comprises a household of one.

➤ Please make sure that any new project participants are enrolled via the following commands located on the Navigation Bar on the right of the Screen: **Navigation Bar > Participants > Add New Family**. This command will ensure that the new participant, whether a single adult or

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a family household member will be entered as a Family Housing of at least one or persons.

FAQ – Participant Search

1. Do I have to search if I know this person has never been served by my agency?

A: Yes! A participant that is new to your agency may have accessed services from another provider in our community. Performing this initial search will keep your reports and those of all providers in our community, as accurate as possible and help to limit the number of duplicate records that are inadvertently created for the same participant.

2. What about the “Find/Enroll Participants” option on the Home Screen – can I use that to search?

A: No. That option is linked to enrollment, so it will only work for participants that are not yet enrolled. For a general system search, always use the “Find Participants” option from the “Participants” drop-down menu as described.

Step 2: Create Family and Participant Records

ETO defines individuals receiving services as **Participants**. If, after searching the system, you have verified that the participant has not already been created by another provider – you will need to create a new record. This is true for any participants in the household that are not currently in HMIS. In other words, if some members of the household you’re enrolling are not yet in HMIS, you’ll need to create the HMIS records now before creating the program entry.

Before we can create the new participant record(s), we will need to create a new family or update an existing one. An individual or group of individuals receiving services together, what many agencies would call a “household,” is defined as a **Family** within ETO and **all participants must be added in to a Family in order to be entered in to the system – even if there is only one person receiving services** or if the people receiving services together might not use the word family to describe themselves (e.g. two adult friends that are not romantically involved).

- **NOTE: Always search HMIS for the possibility of an existing record for a new participant before attempting to add a new participant record or a new member to a family household.**

Create New Family Record

To add an entirely new family, you’ll create a new family record. If you need to add new participants to an existing family, skip to that section on page 17.

1. To begin adding a new family, once again click on the word “Participants” on the Navigation Bar.



2. Select “Add New Family” from the drop-down menu.

3. The Add Family screen should appear. There is a drop-down menu for adding family relationship.

Add Family

* Indicates Required Field

Click to Add Family Member by Family Relationship

Program Enrollment Information:

* Family Member	* Program
Everyone	Admin-Testing CoC PSH

Add Enrollment

4. Click on the arrow and make the selection that matches the person being added. **The first person you add should always be the Head of Household.**

As soon as the Family Member Relationship is selected, the Family Member Screen will appear, allowing you to enter the participant demographics. You may need to scroll down to view all of the questions.

The term **Demographics** is used to refer to characteristics that identify a person, or group of people, e.g. gender, race, and ethnicity. In HMIS the term demographics also includes personal identifying information, e.g. Social Security Number (SSN) and date of birth.

Tip! → **Fields starred (*) are REQUIRED but you should enter all data you have.** HMIS is secure and protects participant privacy.

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Add Family

* Indicates Required Field

Family Member

Head of Household:	<input type="checkbox"/>	(Family)
Relationship:	Self (head of h	
Case Number:		
* First Name:		
Middle Name:		
* Last Name:		
Suffix:	--Select--	
* Name Data Quality (HUD):	--Select--	
DOB:		
* DOB Quality (HUD):	--Select--	
SSN:		
* SSN Quality (HUD):	--Select--	
* Gender (HUD):	--Select--	
Other Gender (HUD):		
Marital Status:	--Select--	
* Ethnicity (HUD):	--Select--	
Address 1:		
Address 2:		
Alert:		
* Race (HUD):	<input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Asian <input type="checkbox"/> Black or African American	

Be sure to ask the participant all of the enrollment questions! Participants may refuse to answer (“Client Refused”), or may not know the information (“Client Doesn’t Know”). **Choosing “Data Not Collected” means you didn’t ask the question.**

Tip! → If you’re adding multiple new participants in a single household/family, click on the drop-down menu to “Add Family Member by Family Relationship” to start entering the next person’s demographic information during the same data entry operation.

END SECTION

FAQ – Create New Family

1. Why am I Adding a New Family if the participant is a single person with no children?

A: HMIS tracks all participant efforts based on their family record and participant records cannot be created without first creating a family record. All participants must be included in a family – ***even if there aren't any other people accessing services***. A single person with no children would be added to a household/family of one. Ensuring that all participants are included in family households within ETO is crucial for accuracy in project-level and system-wide reporting.

2. The family I'm working with already has program entries but there is a new person joining them (e.g. a new baby). How do I add a participant to an existing family?

A: If the head of household and family are already in HMIS, then you don't need to create a new family, you'll add only the new family member. Follow the steps to add a new family member on page 17.

3. How do I know which relationship to choose?

A: Self/Head of Household – use this when you're adding a single person with no children, or the main person requesting services. All other relationships are defined by the person labeled as Head of Household. This should be the first new participant record you create.

- **NOTE:** there can only be **one** Head of Household per family. If you're not sure who to enter as Head of Household, check with your manager.

Spouse – use this to add the Head of Household's married partner.

Non-married Partner – use this to add the Head of Household's non-married partner.

Child – use this to add any children of the Head of Household.

Other Family – use this to add any additional family members not covered by one of the other options listed. Remember that in this case, *family* means anyone accessing services with the head of household.

4. What are the “Data Quality” fields for Name, DOB, and SSN? How do I choose?

A: The answer you choose should match the completeness and accuracy of the corresponding item. For example, if a participant only reports the last four digits of the SSN, you would choose “Approximate or partial SSN reported” for the SSN Quality.

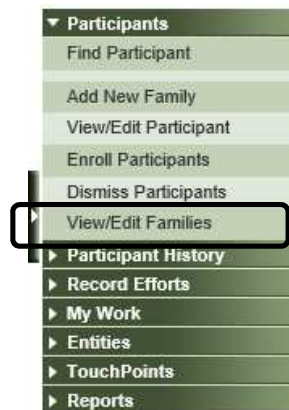
Enrolling a New Participant as part of an Existing Family

If the participant, or family that you're working with brings in a new person (e.g. a child is born/adopted, participant gets married, etc.), then you'll need to enrol this new person in HMIS as a member of this family. The new person will need to fill out the same HMIS enrollment forms and sign a Release of Information (if the new person is 18 years of age or older).

- **NOTE:** always search HMIS for the possibility of an existing record for a new participant before attempting to add a new participant, or a new member to a family household.

If you know the family the new person is joining already exists in HMIS, then start by finding the appropriate family record.

- A. Click on the word "Participants" on the Navigation Bar to open the drop-down menu, and then click on "View/Edit Families."




- B. The View/Edit Families search screen will appear. Enter the head of household's last name into the search box.

Tip! ➔ As with participant searches, you'll get better results using partial search criteria.

A screenshot of the 'View/Edit Families' search screen. It features a search box with the placeholder text 'Search by (partial) Family Name, or (partial) Family Member Last Name:'. To the right of the search box are two buttons: 'Search' and 'Add New Family'. Below the search box, it says 'To see all Families leave the box empty.' At the bottom of the screen, there is a button labeled 'View Participants Not Currently in a Family'.

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- C. A list of families meeting your search criteria will appear. Click the  symbol next to the appropriate family name and a list of family members will drop down.

View/Edit Families

Search by (partial) **Family Name**, or (partial) **Family Member Last Name**:

To see **all Families** leave the box empty.

Include Disabled Families

		Family Name	
+	1	McTesterson	
+	2	Testerooney	

View/Edit Families

Search by (partial) **Family Name**, or (partial) **Family Member Last Name**:

To see **all Families** leave the box empty.

Include Disabled Families

		Family Name		Family Member Count
+	1	McTesterson		1
		Family Members	Age	DOB
		McTesterson, Testy R.	71 years	1/23/1945
+	2	Testerooney		1

- D. Review this list to verify your family selection, and then click on the appropriate family name. This will open a View/Edit Family screen.

- E. Click on “Search for Others...” and a search box will appear on the screen

View/Edit Family: McTesterson

McTesterson

	Family Member	Age	Date of Birth	Relationship	Take Action
1	Testy R. McTesterson	71	01/23/1945	Self/Head of Household ▼	Head of Family Delete

Add New Members to Family: McTesterson

View/Edit Family: McTesterson

McTesterson

	Family Member	Age	Date of Birth
1	Testy R. McTesterson	71	01/23/1945

Search by First or Last Name:

- F. A search screen will appear. Enter the family name into the search box and click “Go.” Any participants that are already in HMIS will appear below the search box.



As with other types of searches, partial search criteria return the best results.

View/Edit Family: McTesterson

McTesterson Edit Family Name

	Family Member	Age	Date of Birth
1	Testy R. McTesterson	71	01/23/1945

Search by First or Last Name: Go

<input type="checkbox"/>	Name
<input type="checkbox"/>	Testerooney, Tester J. (DOB: 09/08/1976)
<input type="checkbox"/>	Testerson, Matilda J. (DOB: 11/04/2012)
<input type="checkbox"/>	Testerson, Pippin F. (DOB: 02/13/2012)

- G. If the new participant is present in the search results, proceed with **Adding New Family Member(s) Already in HMIS** on page 20.

– OR –

- H. If your participant is not on this list, try another search criterion (e.g. if you searched by last name, try searching by first name). If your participant doesn't turn up after searching both first and last names, it's likely that the person is not already in HMIS. Skip to **Adding New Family Member(s) Not Yet in HMIS** on page 21.

Adding New Family Member(s) Already in HMIS

- A. Check the box next to the name of the participant and then click the “Add New Members” button that appears.

Tip! You can add multiple new family members at this time if the names are on the search results list.

Search by First or Last Name:

<input type="checkbox"/>	Name
<input type="checkbox"/>	Testerooney, Tester J. (DOB: 09/08/1976)
<input checked="" type="checkbox"/>	Testerson, Matilda J. (DOB: 11/04/2012)
<input checked="" type="checkbox"/>	Testerson, Pippin F. (DOB: 02/13/2012)

The button should show the name of the family you’re working with. If it shows another family, begin your family search again.

Tip!

- B. The family member(s) you’re adding should now appear in the list above the search box. Add the family relationship to the new family members using the drop down menu. **Remember the relationship is based on the person labeled as head of household.**

View/Edit Family: McTesterson

McTesterson

	Family Member	Age	Date of Birth	Relationship	Take Action
1	Testy R. McTesterson	71	01/23/1945	Self/Head of Household	Head of Family Delete
2	Pippin F. Testerson	4	02/13/2012	--Select--	Select as Head Delete
3	Matilda J. Testerson	3	11/04/2012	--Select--	Select as Head Delete

Search by First or Last Name:

END SECTION

Adding New Family Member(s) Not Yet in HMIS

A. Click on the “Add New Family Member” link.

View/Edit Family: Testeriffic
 Testeriffic

	Family Member	Age	Date of Birth	Relationship	Take Action
1	Prism K. Testeriffic	47	02/04/1969	Self/Head of Household	Head of Family Delete

Add New Members to Family: Testeriffic

[Search for Others...](#)

B. The system will open the Add Family screen. **Note the list of existing members.**

Add Family

* Indicates Required Field

Existing Members

Full Name: Prism K. Testeriffic
 Date of Birth: 2/4/1969 12:00:00 AM
 Relationship: Self/Head of Household

Participant Demographic Information

* Family Name:

- C. You should see a drop-down menu for adding family relationship just below the “Family Name” box. Click on the arrow and make the selection that matches the person being added. **Remember the relationship is based on the person labeled as head of household.**
- D. As soon as the Family Member Relationship is selected, the Family Member Screen will appear, allowing you to enter the participant demographics.
- E. **Fields starred (*) are REQUIRED but you should enter all data you have.** HMIS is secure and protects participant privacy. **Leave Case Number blank. HMIS will assign one.**

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Add Family

* Indicates Required Field

Existing Members

Full Name: Prism K. Testeriffic
Date of Birth: 2/4/1969 12:00:00 AM
Relationship: Self/Head of Household

Participant Demographic Information

* Family Name:

Family Member

Head of Household:	<input type="checkbox"/> (Only one Head of Household may be selected for this Family)
Relationship:	Child
First Name:	<input type="text"/>
Middle Name:	<input type="text"/>
Last Name:	<input type="text"/>
Suffix:	--Select--
Address 1:	<input type="text"/>
* Name Data Quality (HUD):	--Select--

If you're adding multiple new participants in a single household/family, click on the drop-down menu to "Add Family Member by Family Relationship to start entering the next person's demographic information.



- F. Be sure to ask the participant all of the enrollment questions! Participants may refuse to answer ("Client Refused"), or may not know the information ("Client Doesn't Know"). **Choosing "Data Not Collected" means you didn't ask the question.**

END SECTION

FAQ – Enrolling a New Participant as part of an Existing Family

1. Why not just click on the “Add New Member” link, since that’s what I’m trying to do?

A: The “Add New Member” link goes directly to creating a completely new participant, i.e. persons that are not yet in HMIS. Always search the system before creating new records. Performing this initial search will keep your reports and those of all providers in our community, as accurate as possible and help to limit the number of duplicate records that are inadvertently created for the same participant household.

Step 3: Create a Program Entry

The process for creating a new program entry is slightly different for new and existing participants. We will discuss adding a program entry for a newly created participant first. If you are adding a program entry for an existing participant, skip to that section on page 27.

Create a Program Entry for New Participants

Once you’ve entered or reviewed all of the participant demographics and answered the “Data Quality” questions for all new participants, **review everything you have input and make sure there are no errors**. If you find an error, fix it now before proceeding with the following steps:

- A. Scroll down to the “Program Enrollment Information” section under the “Veteran Status” question.

- B. If this is a program entry for a **New Family**, select “Everyone” in the “Family Member” drop-down menu.

– OR –

- C. If this is a program entry for a new participant in an **Existing Family**, select the new family member that needs the program entry in the “Family Member” drop-down menu. **You need to select the person by name**. Click “Add Enrollment” if you are adding more than one new family member. **DO NOT** select any option with “Household Member” in the name.



It will take the system a few seconds to update the “Family Member” drop-down menu. Waiting those few moments is critical to avoid creating errors in the system and on your agency’s reports.



D. In the “Program” drop-down menu, select the name of your program.

Tip! → If you don’t see your program listed, check in with your manager.

E. Enter the program enrollment date in the “Start Date” box.

➤ **NOTE:** this is the program entry of the new family member(s) only.

You can click on the calendar icon for easy entry.

← **Tip!**

F. Click the “Save” button.

G. After you click “Save” the system will check for potential duplicates and flag them for review. **Always search HMIS for the possibility of an existing record for a new participant before attempting to add a new participant record or new member to a family household.** If any potential duplicates are found, look over the information carefully to verify that you’re not re-entering an existing participant.

Duplicate Information
 You are attempting to add a new Family Member with potential matches in the system. Duplicate Check data points are selected on the 'Manage Demographics' page.

DOB: 1/23/1945

There are potential matches for this new Family Member at the enterprise-level:

	Name	SSN	DOB	Status	Program
<input checked="" type="radio"/>	Add as New				
<input type="radio"/>	1. test test(Community Housing Partnership)	111-11-1111	1/1/1990	Not Enrolled	

Cancel Save

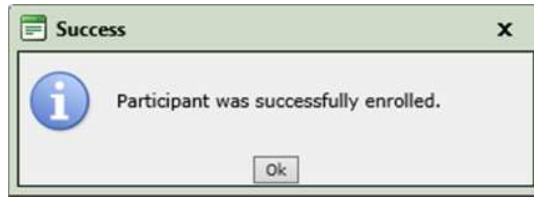
H. If the system finds an existing record for your participant, click the circle to the left of the correct participant record and click the “Save” button.

➤ **NOTE:** This step helps to limit the number of duplicate records that are inadvertently created for the same participant household.

– OR –

I. If you’re sure this is a new participant, click the circle to the left of “Add as New” and then click the “Save” button.

J. A “Success” dialog box may appear at this stage.



K. Click “Ok” and then add a Project Entry TouchPoint Assessment to complete the new Program Entry. See **Completing TouchPoint Assessments** on page 35.



The Program Entry is NOT complete without the Project Entry TouchPoint Assessment.



Create a Program Entry for Existing Participants

- **NOTE:** Skip this section if you are creating a Program Entry for New Participants

Once you have reviewed all of the participant demographics, select “Enroll Participants” on the Navigation Bar on the right.



A. The “Enroll Participants” screen will appear.

Enroll Participants into Admin-Testing CoC PSH

Search for Participants in ADMINISTRATION by last name and/or first name, Social Security Number, case number, or family name. To see **all Participants** leave the boxes empty.

Last Name:

First Name:

or

SSN:

or

Case Number:

or

Family Name:

- B. Enter search criteria for the participant(s) – **the best thing to search by is the case number**. If you didn't note down the case number, **use partial search criteria for better results**.

Enroll a Participant in Test Program D - CoC

Only one field will be used to search at any given time.

Last Name:

First Name:

SSN:

Case Number:

Family Name:

<input type="checkbox"/>	Participant	Age	Case Number	DOB
<input type="checkbox"/>	Michelle Tester	30	78010	8/28/1986
<input type="checkbox"/>	Matilda Testerson	4	87110	11/4/2012
<input type="checkbox"/>	Pippin Testerson	4	87111	2/13/2012


- C. Check the box(es) next to the correct participants and a “Continue” button will appear, along with any enrollment options if applicable. Choose the appropriate option before clicking the “Continue” button.

Single New Participant to Enroll

- 1) If you're enrolling a single participant, check the box next to the name of the participant you wish to enroll. The “Program Start Date” box will appear once you have selected the participant.
 - a. Enter the participant's enrollment date in the “Start Date.”

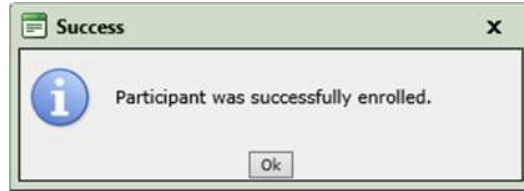
Below are all Participants who are not currently enrolled in **Test Program D - C**

<input type="checkbox"/>	Participant	Age
<input checked="" type="checkbox"/>	Matilda Testerson	3
<input type="checkbox"/>	Pippin Testerson	4

* **Program Start Date:** 

Tip!  You can click on the calendar icon for easy entry.

- b. Click the “Enroll Participant” button. A “Success” dialog box may appear at this stage.



- c. Click “Ok” and then add a Project Entry TouchPoint Assessment to complete the new Program Entry. See **Completing TouchPoint Assessments** on page 35.



The Program Entry is NOT complete without the Project Entry TouchPoint Assessment.



Multiple New Participants to Enroll

- 1) If you're enrolling multiple participants at a time, you will need to tell the system if they entered the program on the same date or not.

Search

<input type="checkbox"/>	Participant	Age
<input type="checkbox"/>	Michelle Tester	30
<input checked="" type="checkbox"/>	Matilda Testerson	4
<input checked="" type="checkbox"/>	Pippin Testerson	4

Enroll Selected Participants with Different Program Start Dates
 Enroll Selected Participants with the Same Program Start Dates

Continue

- a. A basic version of the "Enroll a Participant" screen will appear. Enter the "Program Start Date" and verify the participants included. **You can click on the calendar icon for easy entry.**

Enroll a Participant in Test Program D - CoC

Back to Search

* Program Start Date:

Enroll Participants

Participants
Matilda Testerson
Pippin Testerson

- b. Click the "Enroll Participants" button.

- c. A "Success" dialog box may appear.



- d. Click "Ok" and then add a Project Entry TouchPoint Assessment to complete the new Program Entry. See **Completing TouchPoint Assessments** on page 35.



The Program Entry is NOT complete without the Project Entry TouchPoint Assessment.



Step 4: Add a Project Entry TouchPoint Assessment

Participant Assessments are called ***TouchPoints*** in ETO. In order to complete the program entry process, you'll need to add a Project Entry TouchPoint Assessment.

The "Record TouchPoints" screen will appear automatically after you have saved the program enrollment information. Proceed with the **Completing TouchPoint Assessments** section on page 35.

END SECTION

III. Recording a Program Exit

When a participant exits your program, for whatever reason, you will need to update the information in HMIS. There are two steps to exiting a participant in HMIS:

Step 1: Add a Project Exit TouchPoint Assessment

Step 2: Dismiss the Participant from the Program

Step 1: Add a Project Exit TouchPoint Assessment

Add a Project Exit TouchPoint Assessment for all participants in the exiting household/family. See **Completing TouchPoint Assessments** on page 35.



The Program Exit is NOT complete without the Project Exit TouchPoint Assessment and Dismissing the participant(s) from the program.



Step 2: Dismiss the Participant(s) from the Program

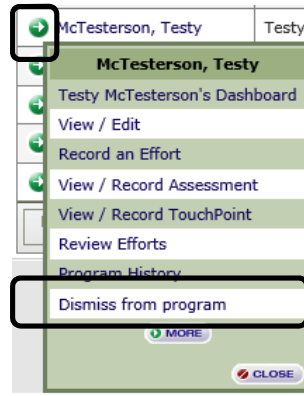
ETO refers to participants that have exited a program as **Dismissed**. In order to finalize the Program Exit you will need to “Dismiss” the participant and complete the brief assessment.

- A. Click on the “Search” button in the Quick Search bar at the top left of the screen.
 - **NOTE:** always verify to make sure that you are in the appropriate site and/or project within HMIS first.



HMIS User Guide: Entering Participant Information

- B. A list of all enrolled participants will appear on your screen. Scroll down to find the correct participant and then click the green arrow to the left of the participant name.



- C. A new menu will pop up next to the participant's name. Select "Dismiss from program."

- D. The Dismiss Participants screen will appear. Verify the appropriate participant is named on the right side of the screen. **Enter all information requested**, then click the "Dismiss Participant" button.

Dismiss Participants from Test Program D - CoC

Search for Participants in ADMIN - Data Upload Testing by last name and/or first name, Social Security Number, case number, or family name. To see **all Participants**

* Program End Date:

Dismissal Reason:

Successfully Completed:

Name
McTesterson, Testy

- E. A "Success" dialog box will appear.



FAQ – Step 2: Dismiss the Participant from the Program

1. How do I choose the “Dismissal Reason”?

A: Select the most appropriate option based on the individual participant circumstances.

- **NOTE:** The option selected here should match the information provided on the paper forms and should align with the answer given in the **Exit TouchPoint Assessment** (see page 46).

Dismissal Reason:

Successfully Completed:

-- Select --

Completed program

Criminal activity/destruction of property/violence

Death

Disagreement with rules/persons

Jail, treatment program, or hospital

Left for a housing opp. before completing program

Needs could not be met by project

Non-compliance with project

Non-payment of rent/occupancy charge

Other

Reached maximum time allowed in project

Unknown/disappeared

If you're unsure about what to select, check in with your manager.

IV. Completing TouchPoint Assessments

Participant Assessments are called **TouchPoints** in ETO. There are four types of TouchPoint Assessments, listed below. Please note that HMIS uses the term “Project” in place of the word Program and we’ve included both here.

1. Program / Project Entry
2. Program /Project Annual Assessment
3. Program / Project Update
4. Program / Project Exit

A few notes on timing:

- The Project Entry TouchPoint Assessment **must** be completed as part of the Program Entry process in HMIS.
-
- The Project Annual TouchPoint Assessment should be completed within 30 days of the anniversary of the Project Entry TouchPoint. All participants must be assessed a **minimum** of annually to verify ongoing eligibility for services and enrollment.
 - Some programs require more assessments so you should check in with your manager if you aren’t sure how often you need to enter updated information in HMIS.
 -
- The Project Exit TouchPoint Assessment **must** be completed as part of the Program Exit process in HMIS.

To Add a TouchPoint Assessment

- A. Click on the “Search” button in the Quick Search bar at the top left of the screen.
 - **NOTE:** always verify to make sure that you are in the appropriate site and/or project within HMIS first.



- B. A list of all enrolled participants will appear on your screen. Scroll down to find the correct participant and then click the green arrow to the left of the participant name.

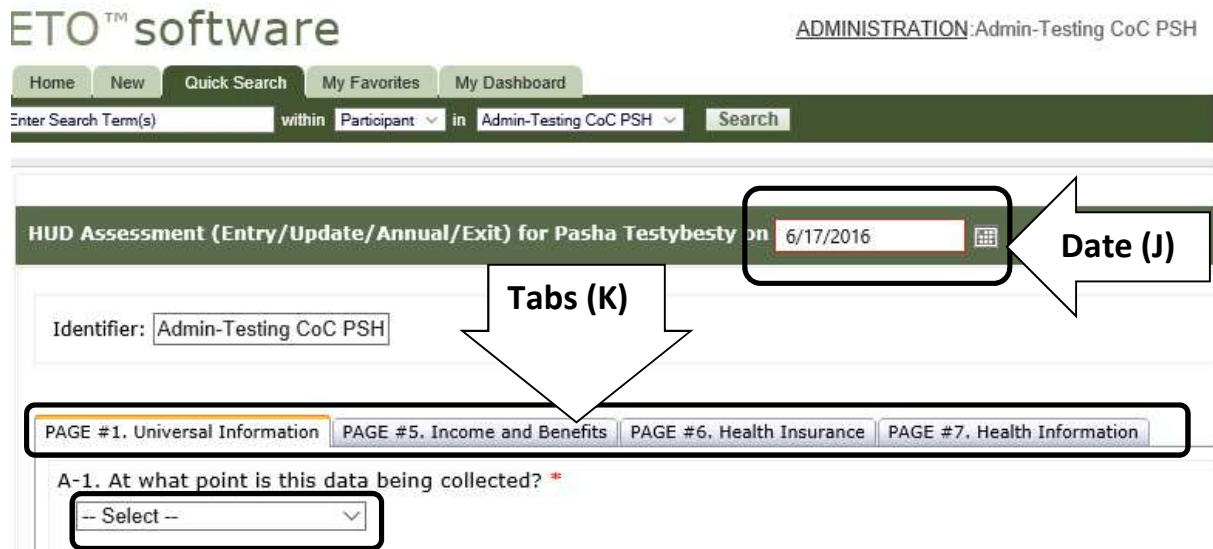


- C. A new menu will pop up next to the participant’s name. Select “View / Record TouchPoint.”

D. The Review TouchPoints screen will appear. Verify the appropriate participant is named on the screen, then click the “Take New TouchPoint” button.



E. The “HUD Assessment (Entry/Update/Annual/Exit)” screen will appear.



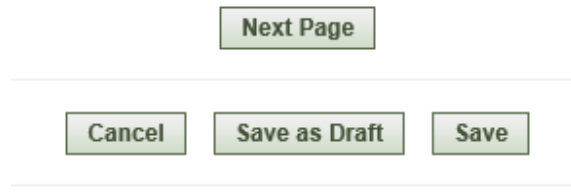
F. The date at the top of the page will always default to the current date. However, this needs to change to the same date the paper assessment was completed (or when the actual assessment was completed). **Click on the calendar icon to correct it.**

- **NOTE:** you should always enter this information in HMIS within **one** business day of collecting it.

- **NOTE:** For Entry TouchPoint Assessments only, this date needs to match the participant Project Entry Date (which can be referenced in question A-2 of the Entry TouchPoint Assessment).
- G. You should see tabs on the screen labeled with “PAGE #.” These correspond to the different sections of the paper assessment forms.
- **NOTE:** the number of tabs may be different for adults and children, the type of project, and the type of TouchPoint Assessment.
 - **NOTE:** as you enter the information, the screen may change as the system will automatically ask any necessary follow-up questions. The system will not ask for any information that isn't captured on the paper forms.
 - **NOTE:** the questions on each tab correspond to the HMIS forms. The numbers may not be sequential but you will have all required information as long as the forms are complete.
 - **NOTE:** questions marked with an asterisk (*) require a response in order for HMIS to save the TouchPoint Assessment record.
- H. **Be sure to complete all tabs for the given TouchPoint in HMIS.**
- I. At the bottom of the screen, there are various buttons to help you navigate through the assessment.
- “Next Page” will take you to the next tab of the assessment and “Previous Page” will take you to the previous tab.
 - “Save” will record all the information you input once all tabs of the assessment are complete.
 - If you need to save your work prior to completing all tabs in HMIS, click the “Save as Draft” button. **NOTE:** this will exit you out of the assessment and you should only use this option if you cannot continue at this time.

HMIS User Guide: Entering Participant Information

- “Cancel” will erase all of your data entry and exit you out of the assessment.



A screenshot of a software interface showing four buttons: "Next Page", "Cancel", "Save as Draft", and "Save". The "Next Page" button is positioned above a horizontal line, while the other three buttons are below it. The "Cancel", "Save as Draft", and "Save" buttons are arranged horizontally and are separated by thin vertical lines. Below these buttons is another horizontal line, followed by a double-line border at the bottom of the section.

TouchPoints PAGE #1. Universal Information

Answer all questions that appear and/or make any changes necessary to the answers on this page so that they reflect the information current at the time of the assessment. The numbers may not be sequential but you will have all required information as long as the forms are complete. The system will not ask for any information that isn't captured on the paper forms.

- **NOTE:** as you enter information, the screen may change and the system will automatically ask any necessary follow-up questions.
- **NOTE:** the questions on each tab correspond to the HMIS forms.

A. Select the appropriate answer for A-1.

- 1) For Program Entries, select “Project Entry.”
- 2) For Annual Assessments, select “Annual Update Assessment.”
- 3) For other updates, select “Project Update.”
- 4) For Program Exits, select “Project Exit.”

The screenshot shows the top of a web form titled "HUD Assessment (Entry/Update/Annual/Exit) for Pasha Testybesty on 6/17/2016". Below the title bar, there is a text input field for "Identifier:" containing "Admin-Testing CoC PSH". A navigation bar contains four tabs: "PAGE #1. Universal Information" (highlighted in orange), "PAGE #5. Income and Benefits", "PAGE #6. Health Insurance", and "PAGE #7. Health Information". Below the tabs, the question "A-1. At what point is this data being collected? *" is displayed. A dropdown menu is shown with the text "-- Select --" and a downward arrow. A black rectangular box is drawn around the dropdown menu.

B. If the participant already has information stored in the system, the “Populate with previous response” box will appear.

- **NOTE:** this option should only be used for a project Annual Assessment or and Project Exit to ensure that Entry information that automatically carried over to the new TouchPoint HUD Assessment remains accurate.

The screenshot shows the top of a web form titled "HUD Assessment (Entry/Update/Annual/Exit) for Pasha Testybesty on 6/1/2016". Below the title bar, there is a text input field for "Populate with previous response:" containing "-- Select --" and a downward arrow.

- C. If you are entering a Project Entry Assessment for a Head of Household, questions A-4 and A-5 will appear. You will need to type the information from question A-4 into the box for question A-5.

A-4. Continuum Code - HUD-assigned CoC Codes for this Pro

CA-501

A-5. HUD-assigned CoC code for the client's location (Please choose the code that links the client to the correct CoC base if you are unsure please contact your HMIS Administrator) *

- D. If you are entering a Project Entry Assessment, the answer to A-20 will prompt questions about the number of months homeless.
- E. If you are entering a Project Exit Assessment, an additional tab will appear.

Identifier: Test Program D - CoC

PAGE #1. Universal Information PAGE #5. Income and Benefits PAGE #6. Health Insurance PAGE #7. Health Information PAGE #9. Exit Information

A-1. At what point is this data being collected? *

Project Exit

- F. Click the "Next Page" button.

TouchPoints PAGE #5. Income and Benefits

Answer all questions that appear and/or make any changes necessary to the answers on this page so that they reflect the information current at the time of the assessment. The numbers may not be sequential but you will have all required information as long as the forms are complete. The system will not ask for any information that isn't captured on the paper forms.

- **NOTE:** Be sure to ask the participant all of the HMIS form questions! Participants may refuse to answer (“Client Refused”), or may not know the information (“Client Doesn’t Know”). **Choosing “Data Not Collected” means you didn’t ask the question.**

Identifier:

PAGE #1. Universal Information | **PAGE #5. Income and Benefits** | PAGE #6. Health Insurance | PAGE #7. Health Information

When a client has income, but does not know the exact amount, a "Yes" response should be recorded for b source, and the income amount should be estimated.

A-105. Is the client currently receiving income from any source? *

A-139. Is the client currently receiving non-cash benefits from any source? *

- Entering a “Yes” answer to question A-105 will prompt the system to ask follow-up questions about the income the participant is receiving. You will need to select an answer for every income type. **DO NOT** leave any of them blank as this will create errors in your agency’s reports and you will not be able to save this TouchPoint HUD Assessment record.
- Entering a “Yes” answer to question A-139 will prompt the system to ask follow-up questions about the non-cash benefits the participant is receiving. The system will enter a default answer of “No” to all non-cash benefit types. Be sure to make all changes necessary.
- Click the “Next Page” button.

TouchPoints PAGE #6. Health Insurance

Answer all questions that appear and/or make any changes necessary to the answers on this page so that they reflect the information current at the time of the assessment. The numbers may not be sequential but you will have all required information as long as the forms are complete. The system will not ask for any information that isn't captured on the paper forms.

- **NOTE:** Be sure to ask the participant all of the HMIS form questions! Participants may refuse to answer (“Client Refused”), or may not know the information (“Client Doesn’t Know”). **Choosing “Data Not Collected” means you didn’t ask the question.**

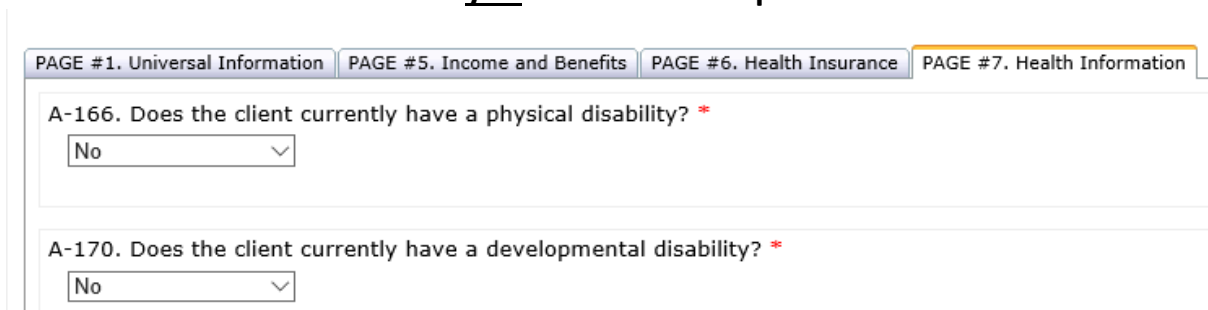
The screenshot shows a web-based form interface with four tabs: 'PAGE #1. Universal Information', 'PAGE #5. Income and Benefits', 'PAGE #6. Health Insurance', and 'PAGE #7. Health Information'. The 'PAGE #6. Health Insurance' tab is highlighted with a yellow border. Below the tabs, the question 'A-149. Is the client currently covered by health insurance? *' is displayed. Below the question is a dropdown menu with the text '-- Select --' and a downward-pointing arrow.

- Entering a “Yes” answer to the question on this tab will prompt the system to ask follow-up questions about the health insurance the participant is covered by.
- DO NOT** leave any questions blank as this will create errors in your agency’s reports and you will not be able to save this TouchPoint HUD Assessment record.
- Click the “Next Page” button.

TouchPoints PAGE #7. Health Information

Answer all questions that appear and/or make any changes necessary to the answers on this page so that they reflect the information current at the time of the assessment. The numbers may not be sequential but you will have all required information as long as the forms are complete. The system will not ask for any information that isn't captured on the paper forms.

- **NOTE:** Be sure to ask the participant all of the HMIS form questions! Participants may refuse to answer (“Client Refused”), or may not know the information (“Client Doesn’t Know”). **Choosing “Data Not Collected” means you didn’t ask the question.**



The screenshot shows a web interface with four tabs: PAGE #1. Universal Information, PAGE #5. Income and Benefits, PAGE #6. Health Insurance, and PAGE #7. Health Information. The 'PAGE #7. Health Information' tab is active. Below the tabs are two questions, each with a dropdown menu. The first question is 'A-166. Does the client currently have a physical disability? *' with 'No' selected. The second question is 'A-170. Does the client currently have a developmental disability? *' with 'No' selected.

- Enter an answer of “Yes” or “No” for each of the questions listed. **DO NOT** leave any of them blank as this will create errors in your agency’s reports.
- Entering a “Yes” answer to any of the questions on this tab will prompt the system to ask follow-up questions about the participant’s health.
- If you are adding a Project Exit Assessment, click the “Next Page” button.

– OR –

- For Project Entry, Annual Update, and Project Update Assessment, click the “Save” button.



The system takes some time to save your information.
Please be patient and don’t click multiple times.



- E. A “Success” dialog box will appear if all questions have been answered and the TouchPoint has been saved. If the system cannot save the information for some reason, you will be prompted to go back into the TouchPoint Assessment page(s) to resolve the identified issues.



- F. Once you have completed and saved all of the pages, return to page 35 and follow the steps to add a TouchPoint Assessment for the next family member.



The TouchPoint Assessment is NOT complete until information has been saved for ALL family members.



TouchPoints PAGE #9. Exit Information

Answer all questions that appear and/or make any changes necessary to the answers on this page so that they reflect the information current at the time of the assessment.

PAGE #1. Universal Information PAGE #5. Income and Benefits PAGE #6. Health Insurance PAGE #7. Health Information PAGE #9. Exit Information

A-207. Where did the client go upon exit? *

-- Select --

- A. Select the participant’s Destination from the drop-down list and click the “Save” button.
 - **NOTE:** Select the most appropriate option based on the individual participant circumstances. You don’t need to try and predict the long-term future, or determine how long the participant is going to be at the location selected for the Project Exit TouchPoint Assessment. For example, if the participant is exiting to a permanent housing unit with no ongoing rental subsidy – choose that option.

-- Select --

- Deceased
- Emergency shelter, including hotel or motel paid for with emergency shelter voucher
- Foster care home or foster care group home
- Hospital or other residential non-psychiatric medical facility
- Hotel or motel paid for without emergency shelter voucher
- Jail, prison or juvenile detention facility
- Long-term care facility or nursing home
- Moved from one HOPWA funded project to HOPWA PH
- Moved from one HOPWA funded project to HOPWA TH
- Owned by client, no ongoing housing subsidy
- Owned by client, with ongoing housing subsidy
- Permanent housing for formerly homeless persons (such as: CoC project; or HUD legacy programs; or HOPWA PH)
- Place not meant for habitation (e.g., a vehicle, an abandoned building, bus/train/subway station/airport or anywhere outside)
- Psychiatric hospital or other psychiatric facility
- Rental by client, no ongoing housing subsidy
- Rental by client, with VASH housing subsidy
- Rental by client, with GPD TIP housing subsidy
- Rental by client, with other ongoing housing subsidy
- Residential project or halfway house with no homeless criteria
- Safe Haven
- Staying or living with family, permanent tenure
- Staying or living with family, temporary tenure (e.g., room, apartment or house)
- Staying or living with friends, permanent tenure
- Staying or living with friends, temporary tenure (e.g., room apartment or house)
- Substance abuse treatment facility or detox center
- Transitional housing for homeless persons (including homeless youth)
- Other
- No exit interview completed
- Client doesn't know

- If, and only if, the participant is being exited for non-compliance due to disappearing / being out of contact or unable to reach, then select “No exit interview completed.”
- If you are not sure which option to select, check in with your manager.

B. The option selected here should match the information provided on the paper forms and align with the “Dismissal Reason” given (see page 34).

C. Click the “Save” button.



**The system takes some time to save your information.
Please be patient and don't click multiple times.**



D. A “Success” dialog box will appear if all questions have been answered and the TouchPoint has been saved. If the system cannot save the information for some reason, you will be prompted to go back into the TouchPoint Assessment page(s) to resolve the identified issues.



E. Once you have completed and saved all of the pages, return to page 35 and follow the steps to add a Project Exit TouchPoint for the next family member.



**The Project Exit TouchPoint Assessment
is NOT complete until information has been
saved for ALL family members.**



FAQ – Completing Touchpoint Assessments

1. How do I know which type of assessment to select for A-1?

A: If you are completing the participant’s Program Entry Assessment, you should select “Project Entry.”

- **NOTE:** HMIS uses the term project for our programs.

If you are entering the participant’s required Annual Assessment, you should select “Project Annual Assessment.”

Alternatively, if you are updating information that the participant has notified you has changed, e.g. income information, you should select “Project Update.”

- **NOTE:** If your program (project in HMIS) uses more frequent assessments than the Annual Assessment, check in with your manager to determine which one should be labeled as the Annual Assessment.

Finally, if you are exiting a participant from your program, you should select “Project Exit.”

- **NOTE:** A special tab (PAGE #9. Exit Information) will appear when you exit participants.
- **NOTE:** Program exits are not complete in HMIS until you “dismiss” the participant (see page 32).

2. My participant’s information has changed since the enrollment date. Should I enter the new information in the Project Entry Touchpoint Assessment?

A: No. The information entered in the Entry Assessment should correspond to the information that is true for the date the participant enrolled in the program. If something has changed since that date, you will need to complete a separate Project Update TouchPoint Assessment.

3. How do I calculate the number of months homeless?

A: Every instance of homelessness counts as at least one month, regardless of the actual duration. So if the participant was homeless for 3 consecutive days last month, you would consider that as one month of homelessness for the purposes of this assessment.

Alternatively, if the participant was homeless for six months of the last year, that would be recorded as six months.

4. What if I don't know where the participant is going / went?

A: Select the most appropriate option based on the individual participant circumstances. You don't need to try and predict the long-term future, or determine how long the participant is going to be at the location selected for the Exit TouchPoint Assessment. For example, if the participant is being exited to a permanent housing unit with no ongoing rental subsidy – choose that option.

- **NOTE:** The option selected here should match the information provided on the paper forms and should align with the “Dismissal Reason” given in **Step 2: Dismiss the Participant(s) from the Program** (see page 32).

If, and **only** if, the participant is being exited for non-compliance due to disappearing / being out of contact or unable to reach, then select “**No exit interview completed.**”

If you are not sure which option to select, check in with your manager.

Glossary of Terms

Case Number

A participant's case number is assigned by ETO and each participant will have a unique case number. In other systems this is called a unique identifier.

Dashboard

A quick summary of the participant activity in HMIS. You'll be able to view participant information, family information, and details about recent TouchPoints.

Demographics

Characteristics that identify a person, or group of people, e.g. gender, race, and ethnicity. In HMIS the term demographics also includes personal identifying information, e.g. Social Security Number (SSN) and date of birth.

Dismiss

Exit from a Program in HMIS.

Efforts to Outcomes / ETO

The provider of HMIS software for the San Francisco community. ETO is used interchangeably with HMIS for the purposes of this guide.

Enterprise

The full San Francisco ETO site, containing all of the information about local service providers and their programs. Also called the SFHMIS Enterprise.

Family/Family Household

A group of individuals receiving services together, also known as a household or family household. All participants must be added in to a Family in order to be entered in to HMIS – even if there is only one person receiving services or if the people receiving services together might not use the word family to describe themselves (e.g. two adult friends that are not romantically involved).

Homeless Management Information System / HMIS

A HUD-mandated database that collects information about programs offered by local service providers, the types of services available, and the individuals being

served. Using all this information HMIS connects individuals to the program, or programs, they are participating in and generates program outcomes.

Participants

Individuals receiving services through program enrollment.

TouchPoints

The term used in ETO for Participant Assessments required by HUD. TouchPoints are entered at Program Entry, Annual Assessment and Update, and Program Exit.