

Outreach Data Entry in HMIS ServicePoint

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Purpose

The purpose of this document is to instruct Outreach Program Staff how to enter client data consistently and efficiently in HMIS ServicePoint.

Glossary

EDA – Enter Data As: A mechanism in HMIS that allows users to enter and view data from a single program's point of view.

'Less is More' Search: Enter the least amount of data to pull back a wide array of results to ensure the client does not already have a record in HMIS.

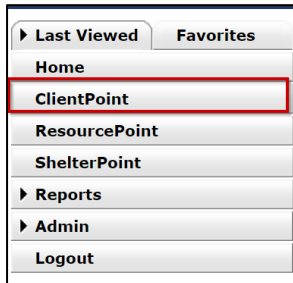
Client ID: Unique identifier to protect privacy. When communicating electronically, please use HMIS ID, not name.

Client-centric: Record data from Client's perspective.

HMIS Steps

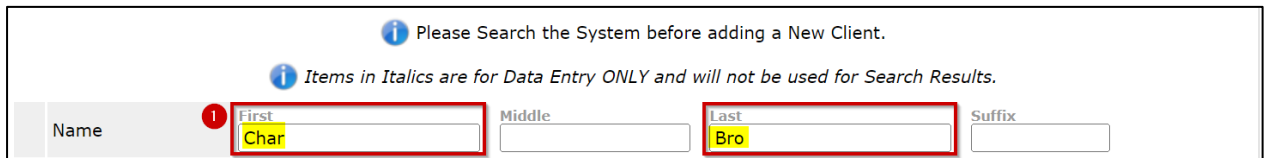
Step 1: ClientPoint – Client Search

1. Ensure you are **EDA'd correctly**.
2. From the menu, select ClientPoint.



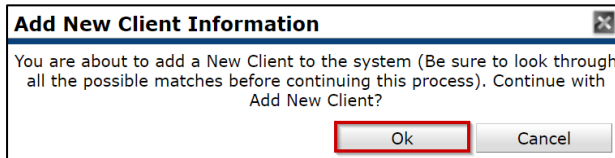
The screenshot shows a navigation menu with two tabs: 'Last Viewed' and 'Favorites'. Under 'Last Viewed', there are links for 'Home', 'ClientPoint', 'ResourcePoint', 'ShelterPoint', 'Reports', 'Admin', and 'Logout'. The 'ClientPoint' link is highlighted with a red rectangular box.

3. Establish if Client Record already exists in HMIS by '**less is more**' search.
 - a. Type first few letters of both first and last name and press 'Search'. (This will check the system for possible records that may already exist.)



The screenshot shows a search interface with a message: "Please Search the System before adding a New Client." Below this is a note: "Items in Italics are for Data Entry ONLY and will not be used for Search Results." The search fields are labeled 'Name', 'First', 'Middle', 'Last', and 'Suffix'. The 'First' field contains 'Char' and the 'Last' field contains 'Bro', both highlighted with red rectangular boxes.

- b. At bottom of screen, check 'Client Results' for search results
 - i. If client appears, press the hyperlink
4. IF NEW CLIENT:
 - a. Type full name correctly in First & Last Name search fields
 - b. Press 'Add New Client With This Information'
 - c. A warning window will pop up reminding you to check the system for duplicate client profiles
 - d. Press 'Ok' to continue.



The screenshot shows a warning window titled 'Add New Client Information'. The text inside reads: "You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process). Continue with Add New Client?". At the bottom, there are two buttons: 'Ok' and 'Cancel'. The 'Ok' button is highlighted with a red rectangular box.

5. If edits to Client's name are needed, proceed to 'Editing an Existing Outreach Client Profile' (page 13)

Step 2: Summary Tab – FOIP & Agreement to Share Information with Coordinated Outreach

6. Under the Summary Tab (a sub-tab of the Client Information Tab), scroll down the screen to the questions in red writing (under Outreach Client Demographics)
 - a. Update **FOIP Notification**
 - b. Click on the next question, "**Has Client given consent...**", to open its 'Question Description' window

Outreach Client Demographics

The FOIP notification has been read and discussed with the client (required) * -Select-

Has client given consent to ALL programs included in the Coordinated Outreach Information Sharing Agreement? * -Select- G

What is your date of birth? []/[]/[]

What is your age group? -Select-

What is your gender? -Select-

What is your ethnicity? -Select-

If Aboriginal ethnicity, which group do you belong to? -Select-

Are you currently experiencing homelessness? -Select-

Are you interested in supports toward housing? -Select-

Client Contact Information

Address []

Email Address []

Telephone Number 1 []

Question Description

Information collected through the HMIS will be used for Coordinated Outreach to assist the participant with support. HMIS information will be electronically visible to any outreach program that is part of the Coordinated Outreach. All information collected through the HMIS, will not be used for any other purpose or disclosed to any parties outside of Coordinated Outreach, except where required by law or as consented by the participant. I have reviewed the types of information shared, and the group involved in the Coordinated Outreach with the participant. I believe that the person understands what is involved in the Coordinated Outreach and voluntarily consents to the use of personal information as described herein. (If the client has agreed to the Coordinated Outreach Information sharing agreement, indicate YES and continue on. If the client does not agree, you can continue to work with the client, however indicate NO, ensure there is no ROI entered above and notify the HMIS Team of this.)

OK

- c. Read the text of the question description thoroughly and answer
 - i. Select YES if client agrees to share info with other Outreach Agencies,
 - ii. Select NO if client does NOT agree to share info with other Outreach Agencies
- d. If NO is selected, email HMIS Team (hmis@calgaryhomeless.com) so they can perform steps to lock down client visibility. Continue to work with the client.

Step 3: Summary Tab – ROI

***NOTE:** Only add an ROI if the Client agrees to share information with other Coordinated Outreach Agencies. DO NOT add an ROI if the Client DOES NOT agree to share information with other Coordinated Outreach Agencies. In this case, skip this step, email the HMIS Team, and move on to Step 4 (Outreach Client Demographics).

7. Under the Summary Tab (a sub-tab of the Client Information Tab), navigate to Release of Information box

ClientPoint > Client Profile Type here for Global Search

Client - (2085) Brown, Charlie

(2085) Brown, Charlie
Release of Information: None

Client Information

Summary

Added to the system 05/17/2022 03:40 PM

Name: Brown, Charlie Gender: U.S. Military Veteran?

Date of Birth: []

Release of Information

Provider	Permission Start Date	End Date
Add ROI	No matches.	

Services

Start Date	End Date	Provider
Add Service	Add Multiple Services	No matches.

8. Press 'Add ROI' to add an ROI row

- a. Ensure Correct Provider
- b. Indicate Yes/No to 'Release Granted'
- c. Enter Start and End Dates for ROI (3 years)
- d. Documentation: enter 'Agency Internal ROI'
- e. Witness: enter name of witness
- f. Press 'Save Release of Information'

Release of Information

Release of Information - (2085) Brown, Charlie

Household Members

This Client is not a member of any Households.

Release of Information Data

Provider*

Outreach Training for HMIS (401)

Release Granted*

Yes

Start Date*

05 / 17 / 2022

End Date*

05 / 17 / 2025

Documentation

Agency Internal ROI


Witness

rb

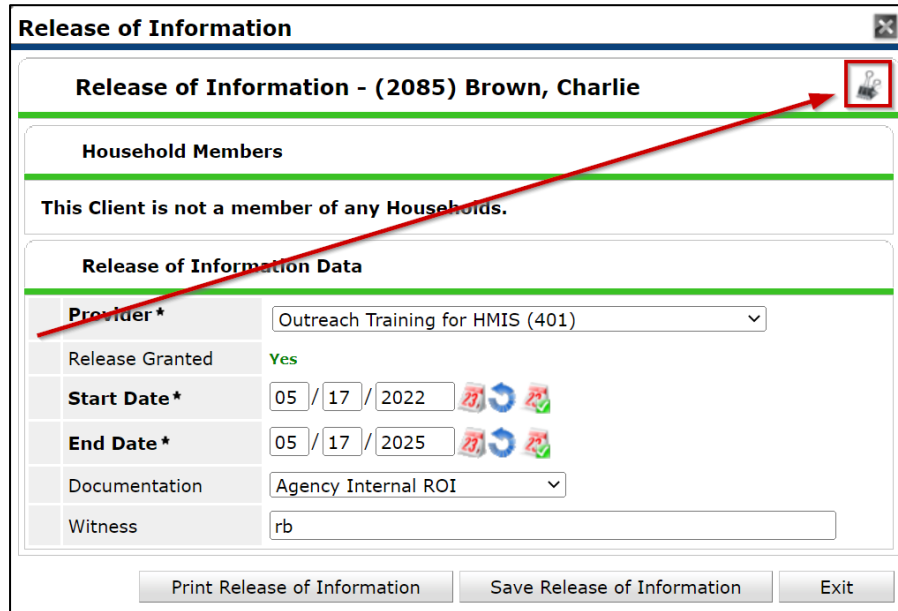
Save Release of Information

Cancel

9. Applicable agencies are required to upload the document, [Coordinated Outreach ROI](#). If in doubt, please upload to be safe and/or contact the HMIS Team for confirmation.
 - a. Select pencil next to ROI Row:

Release of Information			
Provider	Permission	Start Date	End Date
 Outreach Training for HMIS	Yes	05/17/2022	05/17/2025
Add ROI		Showing 1-1 of 1	

- b. Press paperclip in top right-hand corner of ROI window:



Release of Information

Release of Information - (2085) Brown, Charlie

Household Members

This Client is not a member of any Households.

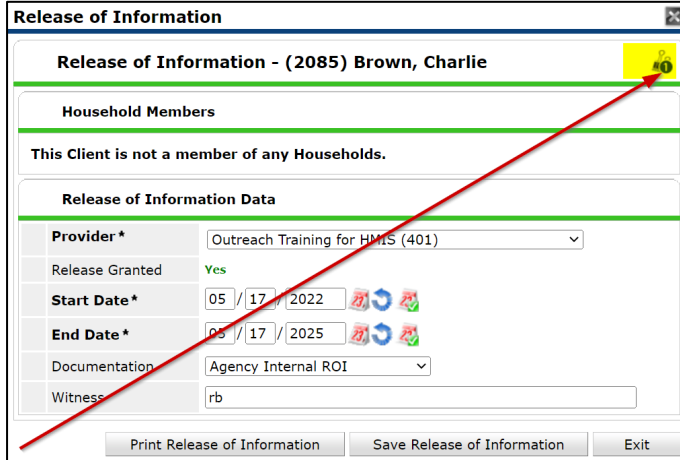
Release of Information Data

Provider *	Outreach Training for HMIS (401)
Release Granted	Yes
Start Date *	05 / 17 / 2022
End Date *	05 / 17 / 2025
Documentation	Agency Internal ROI
Witness	rb

Print Release of Information Save Release of Information Exit

- c. Press 'Add New File Attachment'
- d. Press 'Choose File' to select the correct document from computer folder
- e. Press 'Upload'

*To view if an ROI has already been uploaded to the Client Profile, select the pencil next to the ROI row. If an attachment exists a digit will appear informing how many attachments are uploaded:



Release of Information

Release of Information - (2085) Brown, Charlie

Household Members

This Client is not a member of any Households.

Release of Information Data

Provider *	Outreach Training for HMIS (401)
Release Granted	Yes
Start Date *	05 / 17 / 2022
End Date *	05 / 17 / 2025
Documentation	Agency Internal ROI
Witness	rb

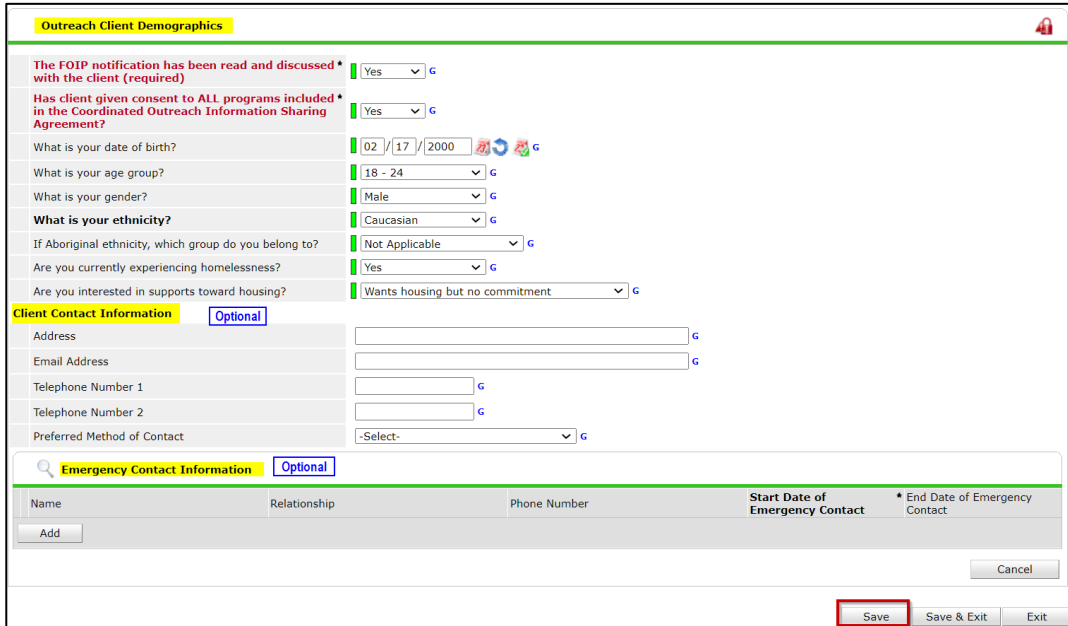
Print Release of Information Save Release of Information Exit

*Ensure current version of the Coordinated Outreach ROI is used by downloading from [HERE](#). Within the ROI a link exists to a list detailing all agencies participating in Coordinated Outreach.

Step 4: Summary Tab – Outreach Client Demographics

10. Under the Summary Tab, navigate to 'Outreach Client Demographics'
11. Enter the client-centric information for the following fields:
 - a. Date of Birth
 - b. Age Group
 - c. Gender
 - d. Ethnicity

- e. If Aboriginal
 - f. Are you currently experiencing homelessness?
 - g. Are you interested in receiving housing supports?
12. Update Client Contact Information as needed. (This is an OPTIONAL section.)
 13. Press 'Add' to update Emergency Contact Information. (This is an OPTIONAL section.)
 14. Press 'Save'



Outreach Client Demographics

The FOIP notification has been read and discussed with the client (required) ☐ Yes ☒ No

Has client given consent to ALL programs included in the Coordinated Outreach Information Sharing Agreement? ☐ Yes ☒ No

What is your date of birth?

What is your age group?

What is your gender?

What is your ethnicity?

If Aboriginal ethnicity, which group do you belong to?

Are you currently experiencing homelessness?

Are you interested in supports toward housing?

Client Contact Information

Address

Email Address

Telephone Number 1

Telephone Number 2

Preferred Method of Contact

Emergency Contact Information

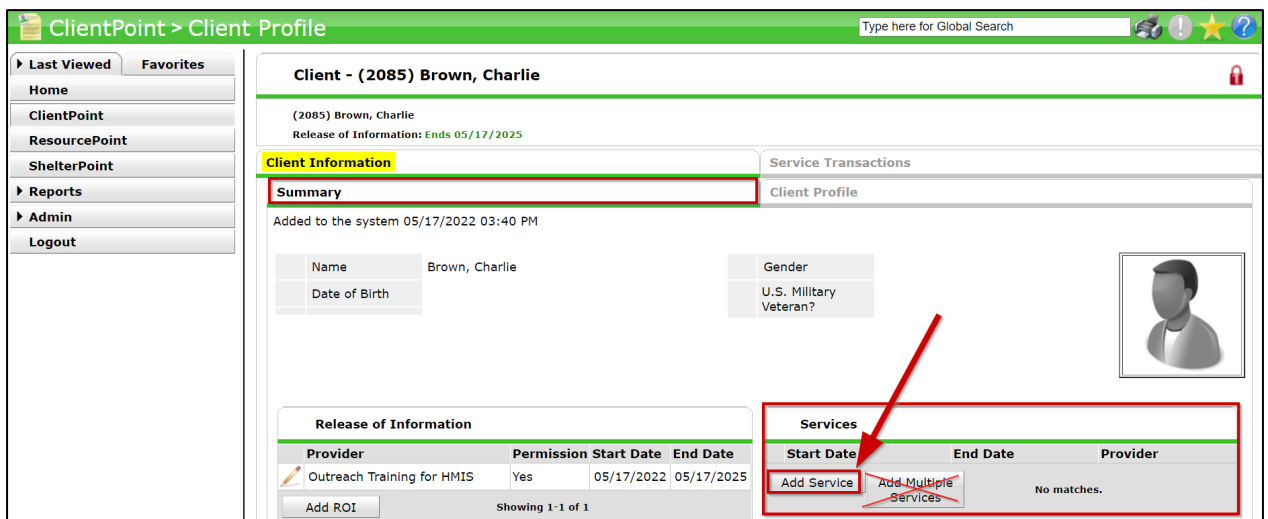
Name	Relationship	Phone Number	Start Date of Emergency Contact	End Date of Emergency Contact
<input type="button" value="Add"/>				

*Once saved, the green history bars will appear.

**Questions are client centric; please record what the client reports to you.

Step 5: Summary Tab – Services

15. Under the Summary Tab, navigate to 'Services'
 - a. Press 'Add Service'
 - **NOTE:** Do NOT use 'Add Multiple Services' since Provider specific fields will be unavailable.



ClientPoint > Client Profile

Type here for Global Search

Client - (2085) Brown, Charlie

(2085) Brown, Charlie
Release of Information: Ends 05/17/2025

Client Information

Summary

Added to the system 05/17/2022 03:40 PM

Name	Brown, Charlie	Gender	U.S. Military Veteran?
Date of Birth			

Release of Information

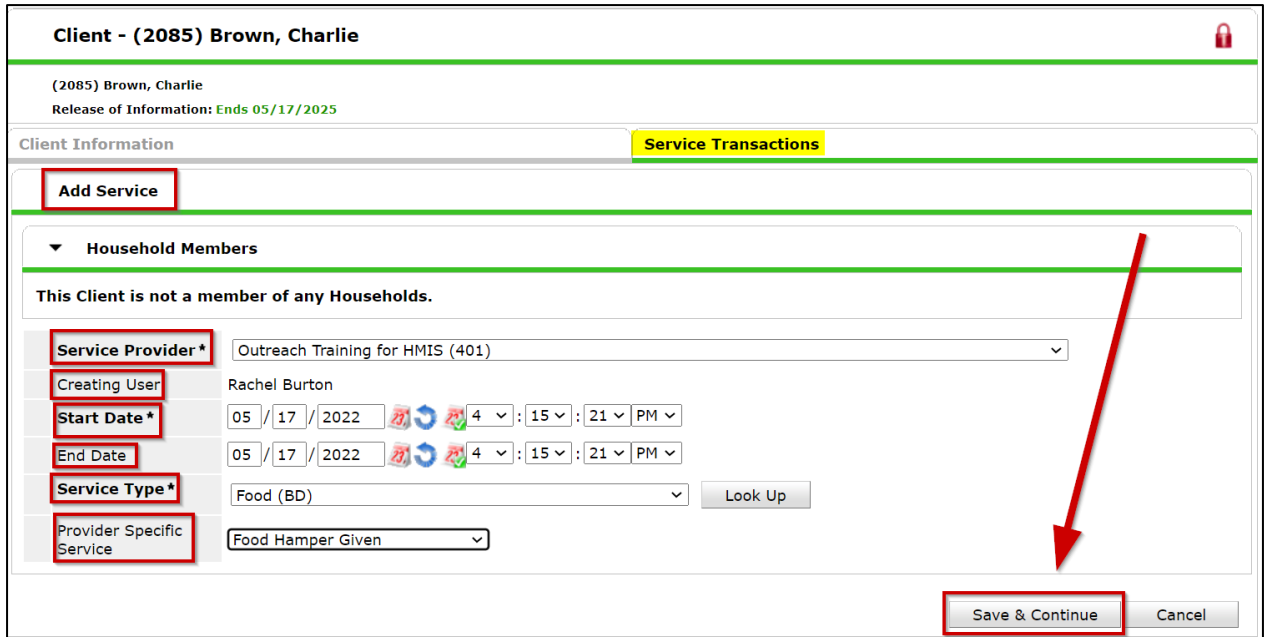
Provider	Permission	Start Date	End Date
Outreach Training for HMIS	Yes	05/17/2022	05/17/2025

Showing 1-1 of 1

Services

Start Date	End Date	Provider
<input type="button" value="Add Service"/>		
<input type="button" value="Add Multiple Services"/>		No matches.

16. You will be directed to the 'Add Service' Tab (a sub-tab of the Service Transactions Tab).
 - a. Ensure correct Provider
 - b. Update the start and end dates in which service was provided
 - c. Indicate Service Type
 - d. If applicable, indicate Provider Specific Service
 - e. Press 'Save & Continue'



Client - (2085) Brown, Charlie

(2085) Brown, Charlie
Release of Information: Ends 05/17/2025

Client Information **Service Transactions**

Add Service

Household Members

This Client is not a member of any Households.

Service Provider* Outreach Training for HMIS (401)

Creating User Rachel Burton

Start Date* 05 / 17 / 2022 4 : 15 : 21 PM

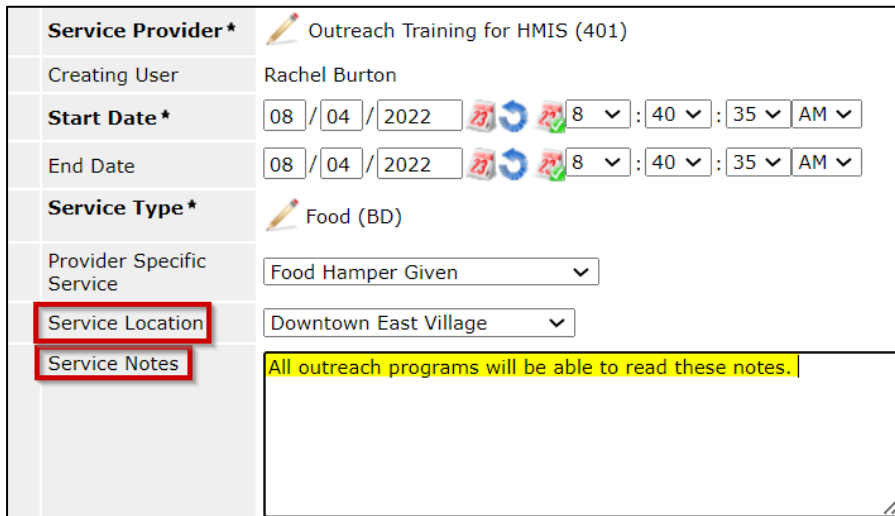
End Date 05 / 17 / 2022 4 : 15 : 21 PM

Service Type* Food (BD) **Look Up**

Provider Specific Service Food Hamper Given

Save & Continue **Cancel**

17. Indicate the Service Location
18. Indicate any 'Service Notes' that may apply. Please note all outreach programs will be able to read these notes. This is not a mandatory field and may be left empty.



Service Provider* Outreach Training for HMIS (401)

Creating User Rachel Burton

Start Date* 08 / 04 / 2022 8 : 40 : 35 AM

End Date 08 / 04 / 2022 8 : 40 : 35 AM

Service Type* Food (BD)

Provider Specific Service Food Hamper Given

Service Location Downtown East Village

Service Notes All outreach programs will be able to read these notes.

19. Scroll down the screen, to Custom Provider-specific questions.
 - a. If your Outreach program has custom questions, you will see them here. Please complete the applicable fields.

Custom Provider-specific questions are captured here:

Referral Source	-Select-
Custom question example 1	
Custom question example 2	-Select-
Custom question example 3	/ /
Custom question example 4	
Drop off Location (if applicable)	-Select-

20. Continue to scroll down the screen and skip the following sections:

- a. Service Costs
- b. Funding Sources
- c. Support Documentation
- d. Follow up Information

21. Under Need Information, update:

- a. Need Status – to 'Closed'
- b. Outcome of Need – to 'Fully Met'
 - i. If applicable, update 'If Need is not Met, Reason'

22. Press 'Save & Exit'

Need Information

Need Status *	Closed
Outcome of Need	Fully Met
If Need is Not Met, Reason	-Select-

Save Save & Exit Exit

23. If additional services are required, repeat Steps 15 – 22

Step 6: Summary Tab – Case Managers

24. Navigate to the Client Information Tab

Client - (2085) Brown, Charlie

(2085) Brown, Charlie

Release of Information: Ends 05/17/2025

Client Information

Service Transactions

Service Transaction Dashboard

Add Need

Add Service

Add Multiple Services

Add Referrals

View Previous Service Transactions

View Shelter Stays

View Entire Service History

25. Under the Summary Tab, navigate to 'Case Managers'

Client - (2085) Brown, Charlie

(2085) Brown, Charlie

Release of Information: Ends 05/17/2025

Client Information

Service Transactions

Summary

Client Profile

Added to the system 05/17/2022 03:40 PM

Name

Brown, Charlie

Gender

Male

Date of Birth

02/17/2000 (Age 22)

U.S. Military Veteran?

Release of Information

Provider	Permission	Start Date	End Date
Outreach Training for HMIS	Yes	05/17/2022	05/17/2025

Add ROI

Showing 1-1 of 1

Services

Start Date	End Date	Provider
05/17/2022	05/17/2022	Outreach Training for HMIS

Add Service

Add Multiple Services

Showing 1-1 of 1

Case Managers

Name	Provider	Phone Number
<div>Add Case Manager</div>		No matches.

Goal

Classification	Type	Date Added	Notes
<div>Add Goal</div>			No matches.

26. Press 'Add Case Manager'.

27. There are 3 ways to assign a case manager. Use method the works best for you:

- Select 'ServicePoint User'.
 - Next to 'Select User', ensure provider is correct, and then below will be a list of all HMIS users with your provider
 - Select appropriate individual from list
- Select 'Me'
 - This will auto-populate based on the information entered in your HMIS User Profile
- Select 'Other'
 - This allows you to manually type in the information
- Update additional information as needed
- Ensure Provider is correct

- f. Indicate Start Date the Case Manager took client on case load
 - i. IF there is an end date (eg. for parental leave), it may be entered in the End Date field
- g. Press 'Add Case Manager'

Case Manager

Case Manager - (2085) Brown, Charlie

Household Members

This Client is not a member of any Households.

Type *

☐ ServicePoint User
 ☐ Me
 ☒ Other

Name *

Rachel Burton

Title

HMIS Support Specialist

Phone Number

587.327.1533

Email Address

rachelb@calgaryhomeless.com

Provider *

Outreach Training for HMIS (401)

Start Date *

05 / 18 / 2022

End Date

/ /

Add Case Manager

Cancel

**Bold fields with asterisks are mandatory when adding a Case Manager*

***Adding a Case Manager is not mandatory, but is highly recommended*

NOTE: To delete a Case Manager, enter 'today' as the end date. This will remove the individual as a case manager.

Step 7: Summary Tab – Goal (Case Notes)

28. Under the Summary Tab, navigate to 'Goal'

Client - (2085) Brown, Charlie

(2085) Brown, Charlie

Release of Information: Ends 05/17/2025

Client Information

Service Transactions

Summary

Client Profile

Added to the system 05/17/2022 03:40 PM

Name

Brown, Charlie

Gender

Male

Date of Birth

02/17/2000 (Age 22)

U.S. Military Veteran?

Release of Information

Provider	Permission	Start Date	End Date
Outreach Training for HMIS	Yes	05/17/2022	05/17/2025

Services

Start Date	End Date	Provider
05/17/2022	05/17/2022	Outreach Training for HMIS



Case Managers

Name	Provider	Phone Number
Rachel Burton	Outreach Training for HMIS	587.327.1533

Goal

Classification	Type	Date Added	Notes
No matches.			

*If the goal/folder already exists, please do not create a new one. Simply click on the note pad to add a new note.

Goal			
Classification	Type	Date Added	Notes
 Outreach	Case Notes	05/25/2022	
Add Goal		Showing 1-1 of 1	

29. To create a **new** goal/folder, press 'Add Goal'

- Ensure Provider is correct
- If applicable, select case manager
- Indicate date the Goal was set (in other words, the date the folder was created).
- Indicate 'Outreach' as Classification
- Indicate Type as 'Case Notes'
- Indicate 'Overall Status' as 'In Progress'
- Press 'Add Goal'

Goal

Goal - (2085) Brown, Charlie

Household Members

This Client is not a member of any Households.

Provider *

Outreach Training for HMIS (401)

Case Manager

-Select-

Date Goal was Set *

05 / 25 / 2022

Classification *

Outreach

Type *

Case Notes

Goal Description

Target Date

Overall Status *

In Progress

If Closed, Outcome

-Select-

If Partially Complete, Percent Complete

-Select-

Projected Follow Up Date

Follow Up User

Outreach Training for HMIS (401)

Follow Up Made

-Select-

Completed Follow Up Date

Outcome at Follow Up

-Select-

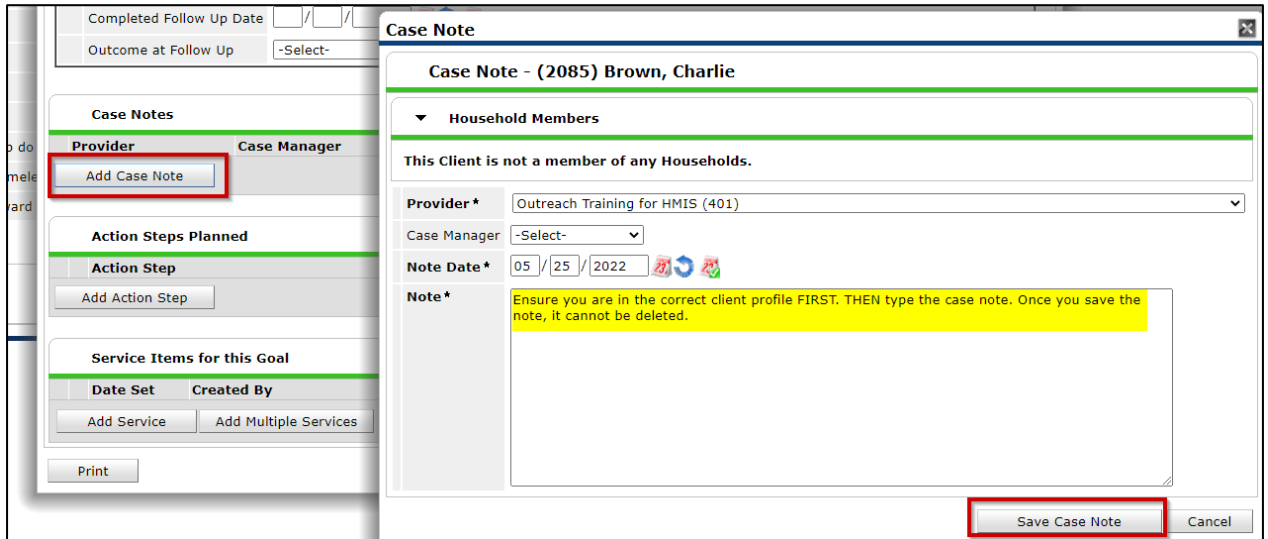
Add Goal

Cancel

30. Press 'Add Case Note' to begin adding case notes to the Goal/Folder.

31. Type the case note.

32. Press 'Save Case Note'.

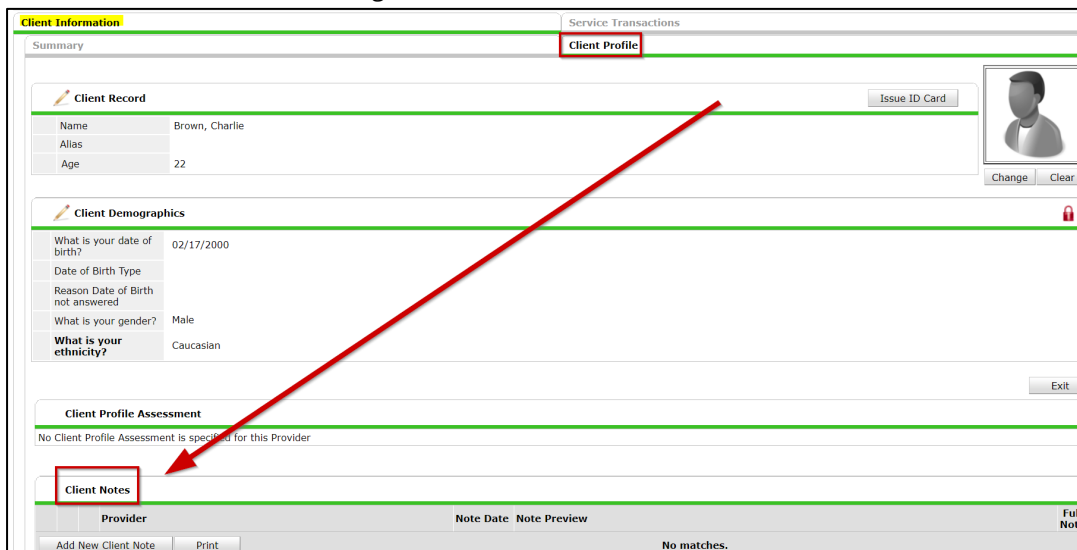


*Ensure you are in the correct client's profile before saving the case note. Case notes cannot be deleted. If you save the case note to the wrong client profile, make an amendment note in the goal/folder impacted, and then email the HMIS Team (hmis@calgaryhomeless.com)

Step 8: Client Profile Tab – Client Notes

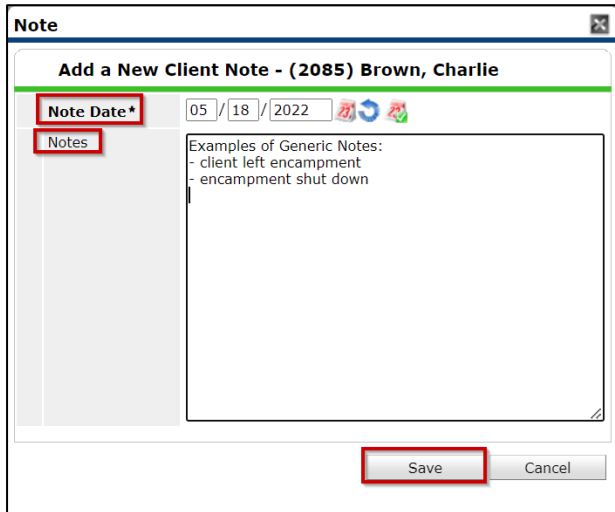
To support knowledge transfer between case managers and agencies, there is a tool available for generic client notes to be recorded (e.g., 'Client left encampment').

33. Under the Client Profile Tab, navigate to 'Client Notes'.






34. Press 'Add New Client Note'.

- Indicate date
- Enter generic note
- Press Save



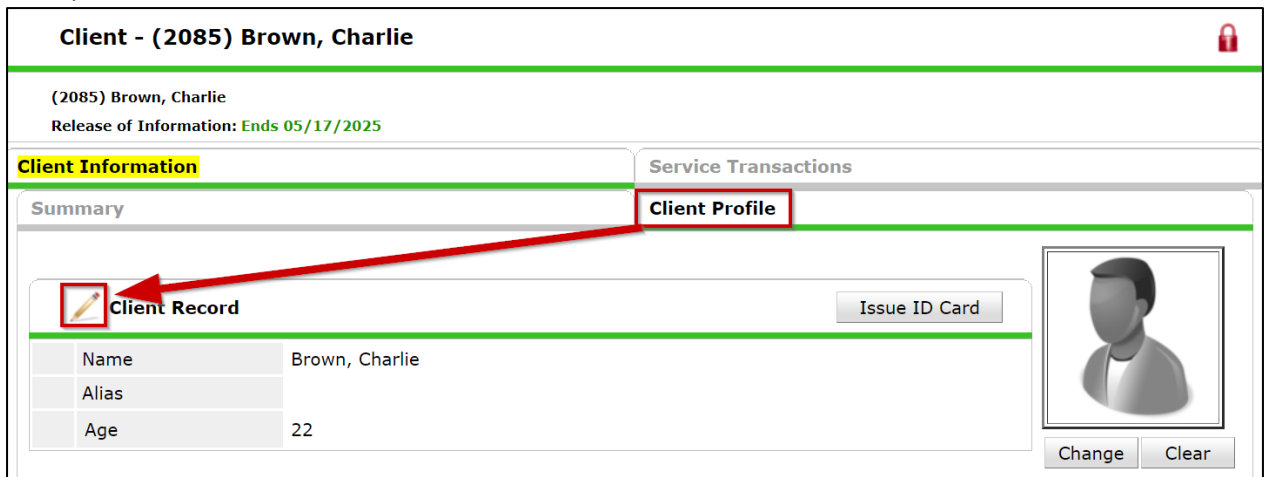
35. Once note is saved, a sunbeam will appear next to it:

Client Notes				
	Provider	Note Date	Note Preview	Full Note
 	Outreach Training for HMIS	05/18/2022	Examples of Generic Notes: - client lef...	
<div>Add New Client Note</div> <div>Print</div>		Showing 1-1 of 1		

36. The sunbeam ensures the note pop ups for all HMIS Users who access the Client Profile. To deactivate the pop-up (in other words, resolve the note), press the sunbeam. This will remove the pop-up from all HMIS Users accessing the Client Profile.


Editing an Existing Outreach Client Profile

1. If edits are required to the Client's Name or Alias, navigate to the Client Profile Tab.
2. Press pencil next to Client Record.



3. In the 'Client Record' window, manually type edits in the required fields as needed.
4. Press Save.

Client Record


 Editing the Client Record Information could affect the Unique ID and the Client Search.

Client Record

Name	First	Middle	Last	Suffix
	Charlie		Brown	
Alias	Chuck			

Save

Cancel

Follow Steps 2 through 6 as applicable. (e.g., If a client already has a valid ROI from your program, there is no need to add a new ROI each time you open the client profile.)