

## Warming Centre Data Entry in HMIS ServicePoint

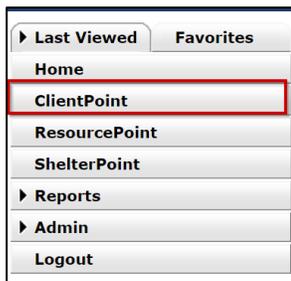
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### HMIS Steps

#### Step 1: ClientPoint – Client Search

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



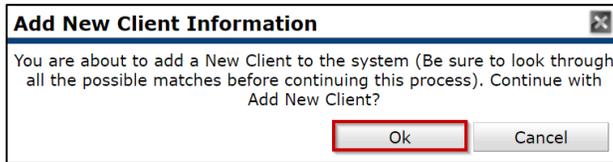
3. Establish if Client Record already exists in HMIS by '**less is more**' search.
  - a. Type first few letters of both first and last name and press 'Search'. (This will check the system for possible records that may already exist.)

 Please Search the System before adding a New Client.

 *Items in Italics are for Data Entry ONLY and will not be used for Search Results.*

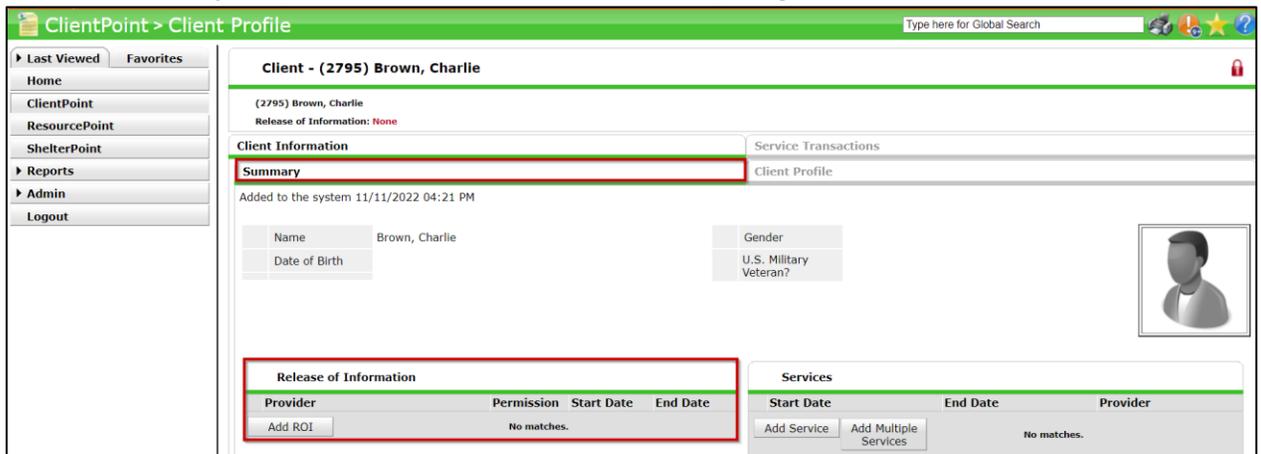
Name	<input style="width: 95%;" type="text" value="Char"/>	Middle	<input style="width: 95%;" type="text"/>	Last	Suffix
	<input style="width: 95%;" type="text" value="Bro"/>		<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

- 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.



## Step 2: Summary Tab - ROI

5. If edits to Client's name are needed, proceed to 'Editing an Existing Outreach Client Profile' later in this document
6. Under the Summary Tab (a sub-tab of the Client Information Tab), navigate to Release of Information box



**Client - (2795) Brown, Charlie**

{2795} Brown, Charlie  
Release of Information: None

**Client Information** | Service Transactions

**Summary** | Client Profile

Added to the system 11/11/2022 04:21 PM

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

Date of Birth: [ ]

**Release of Information**

Provider	Permission	Start Date	End Date
No matches.			

Add ROI

**Services**

Start Date	End Date	Provider
No matches.		

Add Service | Add Multiple Services

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

**Release of Information**

**Release of Information - (2795) Brown, Charlie**

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**Household Members**

This Client is not a member of any Households.

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**Release of Information Data**

**Provider\*** Warming Centre Training for HMIS (417) ▼

**Release Granted\*** Yes ▼

**Start Date\*** 11 / 11 / 2022   

**End Date\*** 11 / 11 / 2023   

**Documentation** Agency Internal ROI ▼

**Witness**

**Step 2: Summary Tab – Warming Centre Assessment**

8. Under the Summary Tab, navigate to 'Warming Centre Assessment'
  - a. Update FOIP Notification

**FOIP:**

NO DATA should be entered beyond the FOIP Notification until the Client has been read the FOIP Notification, and the field indicates 'Yes'.

'Yes' does not indicate the client agrees to share their personal information, 'Yes' indicates the FOIP Notification has been read and explained to the Client.

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

9. Enter the client-centric Basic Demographics:

**Basic Demographics:**

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?  ▼ 

10. Answer the remaining client-centric Housing Status questions:

**Housing Status:**

Are you currently experiencing homelessness?  **G**

Are you connected to a housing program?  **G**

Are you interested in supports toward housing?  **G**

**ATTN HMIS User:** If client agrees to have NSQ completed, please have an onsite Housing Strategist check to ensure a NSQ is completed, or refer to external Housing Strategist

Where do you plan to sleep tonight?  **G**

If 'Other' Sleep Location, please specify:  **G**

If staying outside and not accessing a shelter, please indicate 'YES' to the applicable reasons why you won't access a shelter (leave fields blank/'Select' if non-applicable):

Turned Away (Full)  **G**

Turned Away (Banned)  **G**

Lack of Transportation  **G**

Fear of Safety  **G**

Crowded  **G**

Bed Bugs and other Pests  **G**

Cleanliness  **G**

Not Trustworthy  **G**

Substance Use  **G**

Too Institutional  **G**

Other Reason  **G**

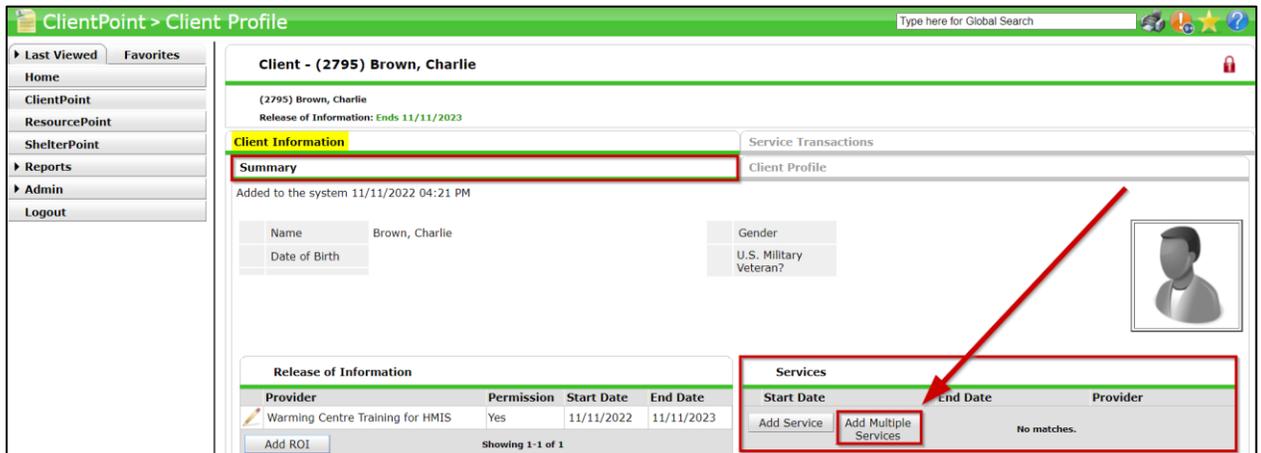
If 'other reason', please provide brief description:  **G**

\*Once saved, the green history bars will appear.

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

### Step 3: Summary Tab – Services

11. Under the Summary Tab, navigate to 'Services'
  - a. Press 'Add Multiple Services'



**Client - (2795) Brown, Charlie**

(2795) Brown, Charlie  
Release of Information: Ends 11/11/2023

**Client Information** | Service Transactions

**Summary** | Client Profile

Added to the system 11/11/2022 04:21 PM

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

Date of Birth:

**Release of Information**

Provider	Permission	Start Date	End Date
Warming Centre Training for HMIS	Yes	11/11/2022	11/11/2023

**Services**

Start Date	End Date	Provider
No matches.		

Buttons: Add Service, Add Multiple Services

12. You will be directed to the 'Add Service' Tab (a sub-tab of the Service Transactions Tab).
  - a. Ensure correct Provider
  - b. Indicate Service Type
  - c. Update 'Need Status' to Closed
  - d. If applicable, indicate Provider Specific Service
  - e. If applicable, indicate Service Location
  - f. To add further services press, 'Add Another' until all services provided are entered
  - g. Press 'Save & Exit' to end service entry

**Multiple Services**

Be sure to select the correct Provider before entering data in the Service List below. If you change the Provider, the page will refresh to make adjustments for the new Provider's Service List defaults. Any data that is currently in the Service List will be removed and will need to be re-entered.

Service Provider\* Warming Centre Training for HMIS (417)

**Service List**

Number of Services  Need Status Identified Set All

Number of Services\*

Start Date\*     PM

End Date     PM

Service Type -Select-

Provider Specific Service -Select-

Service Location -Select-

**Need Information**

Need Status\* Identified

Remove Clear

Add Another Remove All Clear All

Save & Exit Cancel

13. Once saved, you will be directed the 'Service Transactions' Tab, sub-tab: Services:

**Client - (2795) Brown, Charlie**

(2795) Brown, Charlie  
Release of Information: Ends 11/11/2023

Client Information Service Transactions

Needs Services Referrals Shelter Stays Entire Service History

**Previous Services**

Select Dates -Select- Start Date    End Date    Search

Service Start Date	Provider of Service	Service Provided	Service Type	Provider Specific Service	Service Notes	Service Location
 11/11/2022	Warming Centre Training for HMIS	Yes	Basic Needs			

Add Service Add Multiple Services Showing 1-1 of 1

Back to Dashboard Exit

14. Press the 'Pencil' icon to Indicate any 'Service Notes' that may apply.

15. Under the 'Edit Service' Tab, enter relevant notes

**Edit Service**

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▼ **Household Members**

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**This Client is not a member of any Households.**

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**Service Provider\*** Warming Centre Training for HMIS (417)

Creating User Rachel Burton

**Start Date\*** 11 / 11 / 2022 4 : 34 : 04 PM

End Date 11 / 11 / 2022 4 : 34 : 04 PM

**Service Type\*** Basic Needs (B)

Provider Specific Service

Service Location

**Service Notes**

16. Scroll to bottom of screen and press 'Save & Exit'

Warming Centre Services should include the following:

HMIS Service:	Use When:
Extreme Cold Warming Centres	Use each time client accesses warming centre
Health Care Referrals	Health Care required
Housing Related Coordinated Entry	NSQ/Update completed
Mental Health Support Services	Mental health support services required
Substance Use Disorder Referrals	Referral to treat alcohol/drug use

#### Step 4: Client Profile Tab – Client Notes

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

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

**Client Information** | Service Transactions

Summary | **Client Profile**

**Client Record** | Issue ID Card

Name: Brown, Charlie  
Alias:  
Age: 22

**Client Demographics** | Lock

What is your date of birth?: 02/17/2000  
Date of Birth Type:  
Reason Date of Birth not answered:  
What is your gender?: Male  
What is your ethnicity?: Caucasian

**Client Profile Assessment**

No Client Profile Assessment is specified for this Provider

**Client Notes**

Provider	Note Date	Note Preview	Full Note
No matches.			

Add New Client Note | Print

18. Press 'Add New Client Note'.
  - a. Indicate date
  - b. Enter generic note
  - c. Press Save

**Note**

**Add a New Client Note - (2085) Brown, Charlie**

**Note Date\*** | 05 / 18 / 2022

**Notes** | Examples of Generic Notes:  
- client left encampment  
- encampment shut down

Save | Cancel

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

**Client Notes**

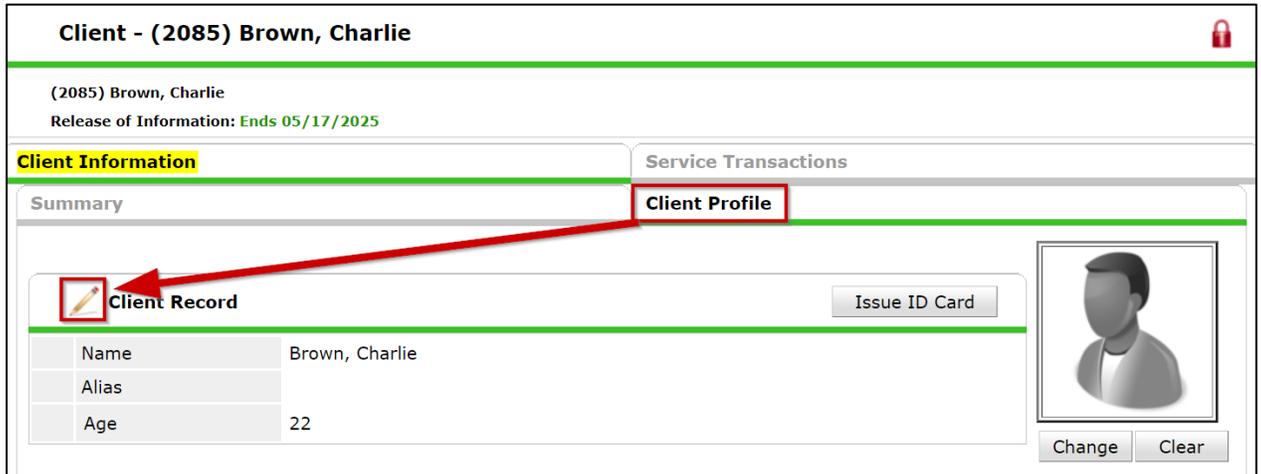
Provider	Note Date	Note Preview	Full Note
 Outreach Training for HMIS	05/18/2022	Examples of Generic Notes: - client lef...	

Add New Client Note | Print | Showing 1-1 of 1

20. 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 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.



**Client - (2085) Brown, Charlie**

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

**Client Information** | Service Transactions

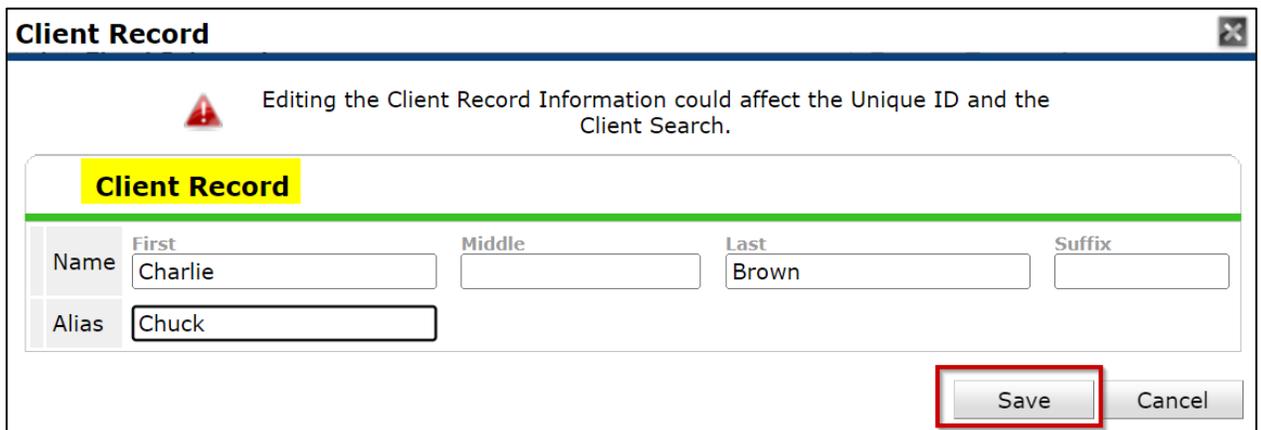
Summary | **Client Profile**

 **Client Record** | Issue ID Card

Name	Brown, Charlie
Alias	
Age	22

  
Change Clear

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.)

### Using Anonymous Clients

After explaining the value of collecting personal information in HMIS, if the individual still does not wish to share their personal information, the Warming Centre may record the services provided using their Warming Centre's designated Anonymous Client Profile as follows:

Warming Centre:	Use Client ID (CID) #:
Distress Centre – Journey Church	156030
Distress Centre – Parachutes for Pets	156032
Mustard Seed – Warming Centre	156033
Salvation Army – Warming Centre	156035
Wood's Homes – Warming Centre	156037

**Step 1:** Search for your Warming Centre's Anonymous Client ID # (or search for 'Anonymous' in the first name field)

**Step 2:** Skip the ROI

**Step 3:** Skip the Assessment

**Step 4:** Enter the appropriate service(s)