



**ENDING  
HOMELESSNESS  
IN MARYLAND.**

**TOGETHER.**

**Coordinated Entry  
Workflow  
HMIS**



**MARYLAND  
BALANCE OF STATE  
CONTINUUM OF CARE**

# HMIS Data Privacy & Confidentiality



# Privacy & Confidentiality 101

- User ID and Password are for your use only and must not be shared with anyone
- You may only view, obtain, disclose, or use the database information necessary to perform your job.
- Log off when you leave
- Input quality data

# Personal Protected Information (PPI)

- Any information about a client used to identify them specifically:
  - Name
  - SSN
  - Date of Birth
  - Phone #

# Personal Protected Information (PPI)

- Allowable HMIS Uses and Disclosures of PPI:
  - To provide or coordinate services to an individual with a proper sharing agreement in place
  - To carry out admin functions, including but not limited to legal, audit, personnel, oversight, and/or management functions
  - To create de-identified information
  - Never send client PPI in an email



# CES in HMIS



# CE Project Setup in HMIS

- HMIS & Coordinated Entry
- CES Project in HMIS
  - Each LHC will have one CES project in HMIS
  - Current users should continue to enter project level data into existing provider along with CES
- Access to CES Project in HMIS
  - Each LHC will designate users to access their CES Project
- Enter CES Assessment within 3 Business Days of Client Intake
  - Can be completed on paper forms if computer access not available

# Data Sharing Across LHCs

- Client data is shared across the LHC
  - HMIS is an “Open System” where everything is shared (*unless client requested to have the information locked*)
  - All HMIS confidentiality procedures are to be followed for CES, just like all other HMIS projects



# HMIS Walkthrough




# HMIS CE Workflow: Review

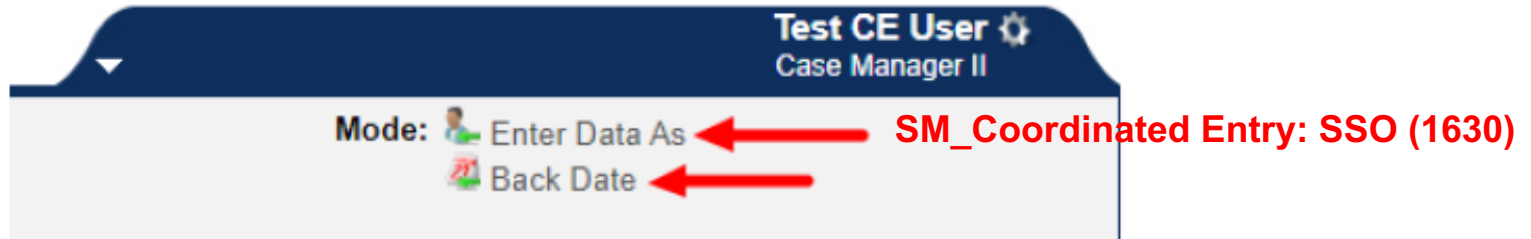
- HMIS Coordinated Entry Workflow Manual
  - Step by step instructions on CE data entry in HMIS
- Remember these CE HMIS data entry steps:
  - Use Enter Data As (EDA) to switch to CE provider
    - SM\_Coordinated Entry: SSO (1630)
  - Initial SSM & Entry Date Assessment
    - This step will add the client to the BNL and allow the LHC to prioritize for housing
  - Interim Review Assessment
    - **ONLY** needed if there is significant change in the client situation
  - Exit Assessment
    - Exiting from the CES Project will remove the client from the BNL



# Access the Project

\* If entering data on a different date from the date you saw your client, use **“Back Date”** mode.

\*\* If you enter data for more than one provider, select the correct provider by clicking **“Enter Data As”** on the top right corner; select the correct CE provider by clicking the  icon.



# Find the Client

## Client Search:

1. Click "*ClientPoint*" on the left side menu.

The screenshot shows a web application interface. On the left is a sidebar menu with the following items: Last Viewed, Favorites, Home, ClientPoint (highlighted with a red arrow), ResourcePoint, ShelterPoint, SkanPoint, Reports, Admin, and Logout. The main content area is divided into two tabs: System News (1) and Agency News (0). The System News tab is active and displays a table with the following data:


Date	Headline
09/03/2022	<a href="#">Team HMIS Support Information</a>

A "View All" button is located at the bottom right of the System News tab.

# Find the Client


2. Search for your client by First and Last Name only, and then click their name or .

### Client Search

 Please Search the System before adding a New Client.

Name	<input type="text" value="Jane"/>	Middle	<input type="text"/>	Last	<input type="text" value="Jetson"/>	Suffix	<input type="text"/>
Name Data Quality	<input type="text" value="-Select-"/>						
Alias	<input type="text"/>						
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>						
Social Security Number Data Quality	<input type="text" value="-Select-"/>						
U.S. Military Veteran?	<input type="text" value="-Select-"/>						
Exact Match	<input type="checkbox"/>						

### Client Results


	ID	Name ▲	Social Security Number	Date of Birth
	466	<a href="#">Jetson, Jane</a>	278-56-9679	01/01/1977






# Adding a New Client

2a. If your client is not found, create a new client by completing the areas indicated below, then click "Add New Client With This Information."

***Completing the areas indicated below is absolutely required!!!***

**Client Search**

 Please Search the System before adding a New Client.

Name 	First	Middle	Last	Suffix
	Jane		Jetson	
Name Data Quality 	Full Name Reported			
Alias	Optional			
Social Security Number 	278	56	9879	
Social Security Number Data Quality 	Full SSN Reported (HUD)			
U.S. Military Veteran? 	No (HUD)			
Exact Match	<input type="checkbox"/>			

# Adding a Household

## Households:

**DO NOT COMPLETE THIS STEP IF YOUR CLIENT IS LIVING ALONE (your client may have a family, but is not living with anyone else at the time of entry into your project)**

1. Click the *“Households”* tab.
2. If no household is listed, create a new household by clicking *“Start New Household.”*  
To complete/ update an existing household, click *“Manage Household.”*

**Do not create a new household if there is an existing household. Always edit the existing household.**

Summary Client Profile **Households** Entry / Exit Case Managers Case Plans

▼ (4883) Female Single Parent

Name	Age	Head of Household	Relationship Head of Household
(466) Jetson, Jane	46	Yes	Self
(7836) Jetson, Astro	11	No	Son
(467) Jetson, Elroy	21	No	Son
(199738) Jetson, Lily	4	No	Daughter

Manage Household To edit an existing household

► Previous Households

Search Existing Households Start New Household To create a new household



# Adding a Household

3. Be sure to complete the *“Head of Household”* and *“Relationship to Head of Household”* drop down for each family member. If needed, use the *“Add/Delete Household Members”* button to add members to the household.

*Do not remove clients from the household using the “Add/Delete Household Members” button.*

Household Information - (4883) Female Single Parent

(4883) Female Single Parent Save Save & Exit Exit

Household Type\* Female Single Parent

Income US\$1,500.00

Client Count 4

Name	Age	Head of Household	Relationship to Head of Household	Joined Household*	Previous Associations	Household Count
(466) Jetson, Jane	46	Yes	Self	04 / 15 / 2013	0	1
(7836) Jetson, Astro	11	No	Son	08 / 25 / 2020	0	1
(467) Jetson, Elroy	21	No	Son	04 / 15 / 2013	0	1
(199738) Jetson, Lily	4	No	Daughter	11 / 29 / 2021	0	2

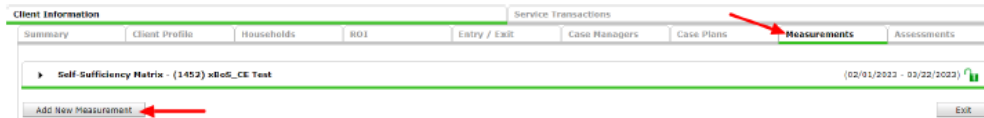
Add/Delete Household Members Never delete clients from a household. Reach out to Team HMIS to remove Household History Report

# Complete the SSM

## Initial SSM Measurement:

*THIS STEP IS ONLY REQUIRED FOR HEAD OF HOUSEHOLDS.*

1. To create an Initial Measurement, go to the "Measurements" tab and click "Add New Measurement".



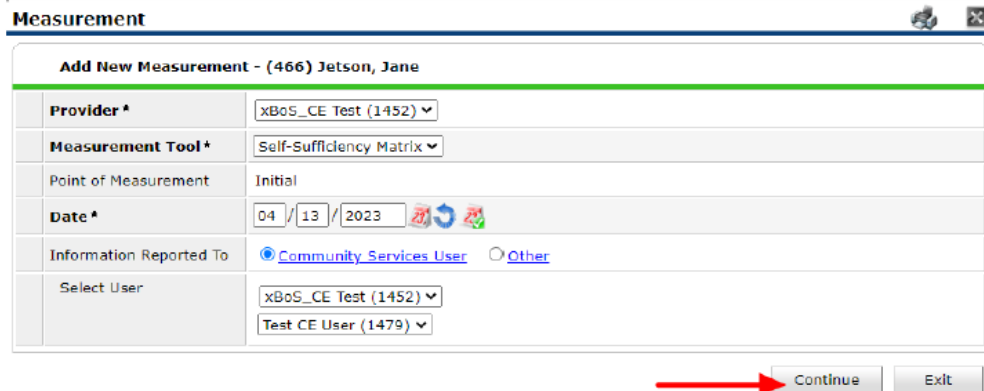
Client Information | Service Transactions

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans | **Measurements** | Assessments

Self-Sufficiency Matrix - (1452) xBoS\_CE Test (02/01/2023 - 03/22/2023)

Add New Measurement | Exit

2. The information will default to Initial Point of Measurement. So, click Continue.




Measurement

**Add New Measurement - (466) Jetson, Jane**

Provider *	xBoS_CE Test (1452) ▼
Measurement Tool *	Self-Sufficiency Matrix ▼
Point of Measurement	Initial
Date *	04 / 13 / 2023
Information Reported To	<input checked="" type="radio"/> Community Services User <input type="radio"/> Other
Select User	xBoS_CE Test (1452) ▼ Test CE User (1479) ▼




Continue | Exit

# Complete the SSM


3. Click the magnifying glass  on the first measurement to see the options to choose and then click “Submit and Move to Next” to complete the measurement.

**Measurement**

**Add New Measurement - (466) Jetson, Jane**

Provider	xBoS_CE Test (1452)
Measurement Tool	Self-Sufficiency Matrix
Point of Measurement	Initial
Date *	04 / 13 / 2023   
Information Reported To	<input checked="" type="radio"/> <a href="#">Community Services User</a> <input type="radio"/> <a href="#">Other</a>
Select User	xBoS_CE Test (1452) ▼ Test CE User (1479) ▼

**Domains**

 CE - Adult Education  1  2  3  4  5  N/A


# Complete the SSM

**CE - Adult Education - Details**

**Score**

- 1 - Has completed education/training needed to become employable. No literacy problems.
- 2 - Needs additional education/training to improve employment situation and/or to resolved literacy problems to where they are able to function effectively in society.,
- 3 - Has high school diploma/GED.,
- 4 - Enrolled in literacy and/or GED program and/or has sufficient command of English to where language is not a barrier to employment.,
- 5 - Literacy problems and/or no high school diploma/GED are serious barriers to employment.,
- 

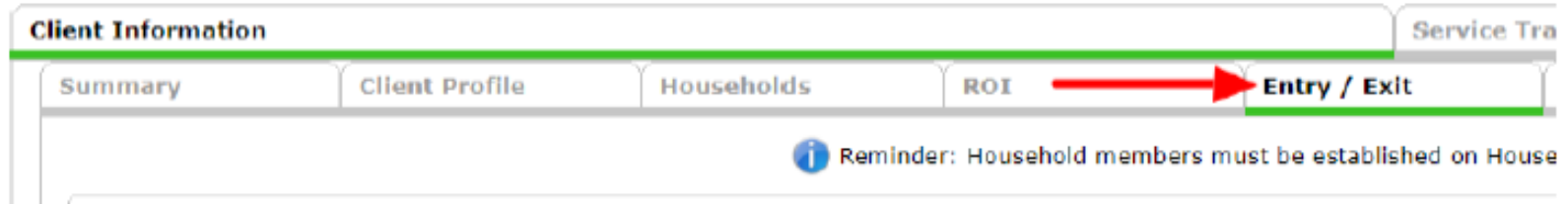
Comments



# Complete the HUD Entry Elements

## Entry Date:

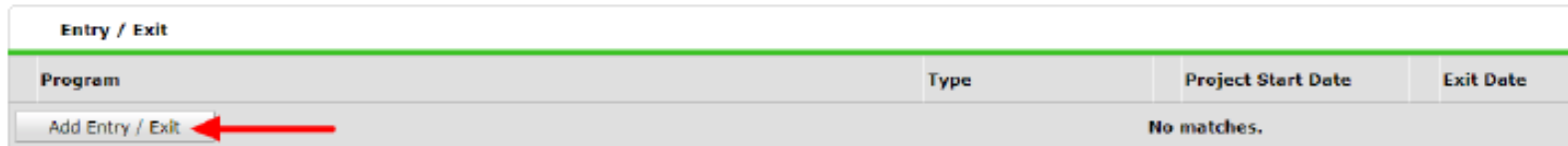
1. Click the *"Entry/Exit"* tab.



The screenshot shows the HUD Client Information page. The 'Client Information' tab is selected, and the 'Entry / Exit' sub-tab is highlighted with a red arrow. A reminder message is visible below the tabs: 'Reminder: Household members must be established on House'.

Client Information				Service Tra
Summary	Client Profile	Households	ROI	Entry / Exit
Reminder: Household members must be established on House				

2. Click *"Add Entry/Exit."*



The screenshot shows the HUD Entry / Exit table. The 'Add Entry / Exit' button is highlighted with a red arrow. The table has columns for Program, Type, Project Start Date, and Exit Date. The text 'No matches.' is displayed in the bottom right corner.

Entry / Exit			
Program	Type	Project Start Date	Exit Date
Add Entry / Exit			No matches.

# Complete the HUD Data Elements

3. If applicable, select all household members entering with Head of Household (the head of household will be selected by default). The "Type" is always "HUD." Enter your "Project Start Date". Always disregard time fields. Click "Save & Continue."

Project Start Data - (466) Jetson, Jane

**Household Members**

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

- (4883) Female Single Parent
  - (466) Jetson, Jane
  - (7836) Jetson, Astrn
  - (467) Jetson, Elroy
  - (199738) Jetson, Lily

Project Start Data - (466) Jetson, Jane



Provider *	xBoS_CE Test (1452) ▼
Type *	HUD ▼
Project Start Date *	04 / 13 / 2023


Save & Continue Cancel

# Complete the HUD Data Elements

4. Complete/update assessment for the Head of Household, then click **“Save”** at the bottom of the assessment. If entering for multiple family members, scroll to the top of the assessment after saving and click the **“Add Household Data”** button to copy common data to household members.

### Entry Assessment

Household Members	Household Data Sharing
<input checked="" type="checkbox"/> (466) Jetson, Jane Age: 46 Veteran: No (HUD)	Client: (466) Jetson, Jane <span style="float: right;"></span>
<input checked="" type="checkbox"/> (7836) Jetson, Astro Age: 11 Veteran: No (HUD)	<b>Coordinated Entry (Test)</b> <span style="float: right;">Entry Date: 04/13/2023 03:43:46 PM </span>
<input checked="" type="checkbox"/> (467) Jetson, Droy Age: 20 Veteran: No (HUD)	Client Phone <input type="text" value="443-574-4647"/> <span style="float: right;">G</span>
<input checked="" type="checkbox"/> (199738) Jetson, Lily Age: 4 Veteran: No (HUD)	Client Email <input type="text" value="jane@cartoonnetwork.com"/> <span style="float: right;">G</span>
	Case Manager Name <input type="text" value="kshdggkashdggkjsd"/> <span style="float: right;">G</span>
	Case Manager Provider <input type="text" value="Parks and Rec"/> <span style="float: right;">G</span>




















# Complete the HUD Data Elements

4a. If entering for multiple family members, click the name of each household member entering (on the left) to complete/update their entry assessment (selected client will be highlighted in **BLUE**). Repeat this step until all client entry assessments are completed, and then click **"Save & Exit"** at the bottom of the last client's assessment screen.

**Entry Assessment**

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Household Members	Household Data Sharing												
<input checked="" type="checkbox"/> (466) Jetson, Jane Age: 46 Veteran: No (HUD)	Client: (7836) Jetson, Astro <span style="float: right;"></span>												
<input checked="" type="checkbox"/> (7836) Jetson, Astro Age: 11 Veteran: No (HUD) 	<span style="float: right;">Add Household Data</span>												
<input checked="" type="checkbox"/> (467) Jetson, Elroy Age: 20 Veteran: No (HUD)	<b>Coordinated Entry (Test)</b> <span style="float: right;">Entry Date: 04/13/2023 03:43:46 PM </span>												
<input checked="" type="checkbox"/> (190738) Jetson, Lily Age: 4 Veteran: No (HUD)	<table><tr><td>Client Phone</td><td><input type="text"/></td><td></td></tr><tr><td>Client Email</td><td><input type="text"/></td><td></td></tr><tr><td>Case Manager Name</td><td><input type="text"/></td><td></td></tr><tr><td>Case Manager Provider</td><td><input type="text"/></td><td></td></tr></table>	Client Phone	<input type="text"/>		Client Email	<input type="text"/>		Case Manager Name	<input type="text"/>		Case Manager Provider	<input type="text"/>	
Client Phone	<input type="text"/>												
Client Email	<input type="text"/>												
Case Manager Name	<input type="text"/>												
Case Manager Provider	<input type="text"/>												

# Complete the Custom CES Questions

**Family Type \***

Adults & Children  G

**Total Adults \***

02  G

**Total Children \***

02  G

**Household Size \***

04  G

# Complete the Custom CES Questions

BoS CE Housing Needs & Preferences									
	Start Date *	Max Bedrooms Needed	Min Bedrooms Needed	Change in HH expected in next 12 Mos?	ADA Unit Accessibility Needed?	Would being closer/further from geographic area promote stability?	Pet Friendly Unit Needed?	If Yes, what type of pet?	Is your pet a certified service animal?
	05/01/2020	04	04	No	Yes	Yes	Yes		
<div style="display: flex; justify-content: space-between;"> <span>Add</span> <span>Showing 1-1 of 1</span> </div>									


  


BoS CE Housing Barriers									
	Start Date *	Criminal History Felony	Criminal History Arson	Criminal History Sex Offender	Criminal History Meth Production	Criminal History Other Recent Misdemeanors	Eviction History Type	Eviction Number of Times	Poor credit or lack of rental history?
	03/09/2023	No	No	No	No	No	Evictions		Yes
	02/01/2023	No	No	No	Yes	Yes	Evictions	02	Yes
<div style="display: flex; justify-content: space-between;"> <span>Add</span> <span>Showing 1-2 of 2</span> </div>									

BoS CE Critical Documents Uploads	
Start Date *	Doc Type *
	07/08/2021 Verification Of Disability
	07/08/2021 Verification of Homeless Episodes Not in HMIS
<div style="display: flex; justify-content: space-between;"> <span>Add</span> <span>Showing 1-2 of 2</span> </div>	

# Exiting the Client

Go to the “Entry/Exit” tab, and then click  next to the blank corresponding “Exit Date” on your entry. Never add an exit date for any other program’s entry.


Entry / Exit			
Program	Type	Project Start Date	Exit Date
xBus_CE Test (1452)	HUD	04/13/2023	
Add Entry / Exit			

Showing 1 of 1

3. Select other household members, if applicable. Enter “Exit Date.” Select “Reason for Leaving” and “Destination”. Click “Save & Continue.” Always disregard time fields.

**Edit Exit Data - (466) Jetson, Jane**

**Household Members**

 To update Household members for this Exit Data, click the box beside each name.

- (4883) Female Single Parent
  - (466) Jetson, Jane
  - (7826) Jetson, Astro
  - (467) Jetson, Elroy
  - (199738) Jetson, Lily

**Edit Exit Data - (466) Jetson, Jane**

**Exit Date \*** 05 / 16 / 2023


**Reason for Leaving** Completed program

If "Other", Specify

**Destination \*** Rental by client, with RRH or equivalent subsidy (HUD)

If "Other", Specify

Notes

 Save & Continue Cancel

4. Update the exit assessment for all applicable household members. Use the “Add Household Data” button to copy common data to household members. Click “Save & Exit.”



# Critical Documents Storage










# Critical Documents Storage

- Critical Documents Upload
  - Not a requirement
  - Intended to have access to documents necessary to verify homelessness, disability status, income, etc
  - Serves as a way to backup important documents
  - Can be viewed across providers to reduce redundancy
  - Can upload as many documents as needed

# Critical Documents

**BoS CE Critical Documents Uploads**  

<b>Start Date *</b>	<input type="text" value="01"/> / <input type="text" value="01"/> / <input type="text" value="2023"/>    G
End Date	<input type="text"/> / <input type="text"/> / <input type="text"/>    G
<b>Doc Type *</b>	<input type="text" value="-Select-"/>  G
Notes	<div style="border: 1px solid gray; padding: 5px;"><p>-Select-</p><p>Birth Certificate</p><p>DD-214</p><p>Income</p><p>Other (please describe in "Notes" below)</p><p>Photo ID (State or Passport)</p><p>SSI/SSDI Benefit Statement</p><p>SSN Card</p><p>Verification Of Disability</p><p>Verification of Homeless Episodes Not in HMIS</p></div> <div style="border: 1px solid gray; height: 100px; width: 100%;"></div> G



# HMIS Demo



# User Practice



# HMIS CE Workflow: User Practice

- Practice Session
  - 10 minutes for all users to log in
  - All users create a new dummy client by using a name with last name “TEST”
  - Use Enter Data As (EDA) to switch to CE provider:
    - SM\_Coordinated Entry: SSO (1630)
  - Initial SSM & Entry Date Assessment