

**OFFICE OF SUPPORTIVE HOUSING**

**HOMELESS MANAGEMENT INFORMATION SYSTEM**

**INTAKE WORKER MANUAL**

## CLIENT SEARCH FUNCTION

**At the top of the screen, the site should be “Office of Emergency Shelter and Services”. This will allow the AOC to view all clients in the system.**

- The “**Identifier Search**” section is to be used only for **exact matches** on SSN, License #, DPA #, or Medicare#. Enter the number and press “Find”.
- The “**Client Information**” section does a Pattern Match, which means it looks for all clients with similar names. In order to yield the most similar matches, enter the “First Name and Last Name. If “DOB”, “Gender”, or “SSN” is entered, the search will be further narrowed. It is therefore recommended that staff search only on First and Last Name to get the most potential matches from which to choose. Click “Find”.
- A number of clients may appear on the grid. To alphabetize the list, click on “Client Name” at the top of the screen. This list will show clients whose names match part or the desired client’s entire name.
- Double Click the correct client. Go to P.2 of Client History. This provides a brief summary of client information. Check for Alerts or Protocol Violations. You can also view Notes, POS History, and Incidents.
- Click “Cancel” to close History screen.
- At the bottom of the Client Identification Screen, click Reception Interview (p.4)

## RECEPTION INTERVIEW SCREEN

**Purpose:** a Reception Interview (RI) must be done, whether the case is open or closed.

**All fields on the RI are mandatory. If “Other” is chosen for a value, there must be an explanation in the “If Other, Explain” field.**

When a closed out client comes back within 15 days from the date of the previous reception interview, the system will automatically produce the old Reception Interview and not create a new one. If the client comes after 15 days, HMIS will automatically create a new reception interview for the client. Note that completion of a Reception Interview will re-open a closed case.

### **Procedure:**

- Search for a client using “Client Search” (P.3 of manual)
- Whether or not the client is found, click “Reception Interview” button at the bottom of the screen.
- The RI screen has 3 pages. Review all the pages for an existing client. Take particular note of any “Alerts”.
- If the client is new, enter as many fields as you can.
- Complete the “Family Members” section and click the box at the left to include or exclude Family Members from the case.
- If a new Family Member is to be added, enter the information in the “Family Member Details” section and Click “Save”. If no family member is to be added, click “Cancel”.
- There is a “Comments” notepad attached to each “Comments” field.
- On screen no. 3 is a field titled **“If service is not provided to this client, select the reason.”** If you complete and save this field, you will not be able to open a case file. If you have a case in which this field is blocking you from opening the case, go to the “Reason” field and select the “Blank” option at the top of the list.
- “Save” the RI. The computer will prompt you for the mandatory fields. Try to enter all the fields, not just mandatory fields.
- A case number is not assigned at this point. Only when a POS is written or the “Client Master” screen is completed will a case number be assigned.
- If you are going to place the client in your shelter, click “Create POS” at the bottom of the screen. See the next page for details of how to create a POS.

## **CREATE/CHANGE POS, ADD FAMILY MEMBERS TO POS, POS HISTORY**

**CREATE POS** - This function is used to write a new POS.

- Enter a “Start Date”. Enter an “End Date”. There are two ways to determine the “End Date”. Either enter the “Shelter Nights” or enter the Projected End Date”. If “Shelter Nights” is entered, the computer will automatically calculate the “End Date.”
- **NOTE: The End Date of a POS is the “Morning of Departure”. It is not a night of shelter. To write a POS for September, for example, the POS should be written from 9/1-10/1.**
- **NOTE: If the POS is written between midnight and 5 AM, the Start Date must be the previous night. For example, if the client arrives at 2AM on 11/6, the POS Start Date is 11/5.**
- Enter Shelter- Choose the “Find Button” to locate the shelter. Double click the Shelter name.
- Enter “POS Type”.
- The “Family Members” grid at the bottom lists all the Open members on the case. Check the family members who will be residing at the shelter.
- Enter any “Notes” that you want to appear on the POS.
- Click “Save POS”.
- Print the POS.

Note: If there a POS in the system that conflicts with the one you are attempting to write, the computer will produce a message stating “Active POS exists, Close the Existing POS”. If you answer yes, the existing POS will be terminated, and a new one created.

**CHANGE POS (Part of Create/Change POS)** - This function is used to change information on a POS, such as the date, family composition, or shelter.

- Enter the “Create/Change POS screen.
- At the “POS Details” section , go the POS# field.
- Click the “Find” button.
- The “POS Master Search” screen appears.
- Double Click the POS you want to change.
- The POS details appear on the “Create/Change” screen.
- Change the relevant information, and “Save” the POS.

**POS HISTORY** is used to view all the POS’s that have been written for the client.

- Click “POS History”. The entire POS History will be displayed.
- Double click the POS you want to view and the details will appear on the screen.

