

OFFICE OF SUPPORTIVE HOUSING
HOMELESS MANAGEMENT INFORMATION SYSTEM

CASE MANAGEMENT TRAINER MANUAL

JOB ROLES OF CASE MANAGERS AND CASE MGT SUPERVISORS

Case Managers:

- Have a caseload assigned to them
- Create Service Plans for their clients
- Meet with their clients on a regular basis
- Are responsible for the upkeep of their caseload's POSs
- Work toward completion of the transitional housing application (where applicable)
- Close cases.

Case Manager Supervisors:

- Oversee the activity of a group of case managers (as defined above)
- Review and approve service plans, protocol violations, and case close-outs, Transitional Housing application, compliance checklists.
- Assign cases to case managers

I. TRAINING STEPS FOR TRAINERS

- a. Discuss client flow thru system, Intake thru Permanent Housing
- b. General HMIS Concepts (II Below)
- c. Discuss screens used at each stage (Case Managers)
 1. Client Master Information screens. This is the most important part of the Case Management Process. Review 6 screens, and 19 subscreens. Make sure they understand the method of clicking a name in the Grid to produce the details below in the "Client Details" section. These can then be edited.
 2. Review Income Screen and focus on terminating income and its effect on other forms. Also changing income. Enter 2 incomes, then terminate one. Click "Include History Details" to show terminated income sources.
 3. Case Notes. Discuss "General Category", "View Notes"
 4. POS: Create, Change, Extend, Close, POS Reminders, POS History. **What if new family member, show how to get on POS?**
 5. Protocol Violations. See Corrective Action Form under Client Agreement/ Print Forms.
 6. EVS, Title XX. Updated every 6 months
 7. TB Screen. Update every 3 months.
 8. Client activities, Referrals. **These screens do not work correctly.**
 9. Compliance Checklist
 10. Client Agreement Print Forms to obtain standard forms like PECO, PGW letter. Also the Client Service Agreement.
 11. Service Plan.
 12. Transitional Housing application
 13. Close Out Client.

- d. **Extra training for Supervisors**
 - a. **Single Client Assignment Screen**
 - b. **Multiple client Assignment Screen (change entire caseload to new worker.**
 - c. **Supervisor review of Inbox to determine screens from workers that need approval.**

II. GENERAL HMIS CONCEPTS

Security - Do not let anyone else use computer on your log in

- a. Title Bar (User Name, Job Role, Site)
- b. Inbox, Work Flow, Forwarding, Scheduler, History. Have trainees send messages to each other.
- c. Icons on Left Hand Side (Task Icons) Leading to Icons across top of screen (Screen Icons).
- d. Screen Dragging. Closing screens vs closing app with “X” button
- e. Client Search. Search thru “Find” or by entering **Case No., SSN at top of screen**. Choose a client. When client is placed at the top of the screen, this is called the “Global Client”. Any screen that is opened will have this client in the screen.
- f. For case managers, “Find” only shows their clients. The supervisor must assign a client to worker for this to happen. “Find” will show all cases assigned to the CM, but case managers can still search for all clients assigned to the shelter, whether in their caseload or not.
- g. CLR and Refresh buttons. CLR clears the Global Client from the screen.
- h. Open Client Master Information screen.
- i. **Open Multiple screens. Multiple screens can be kept open simultaneously. Use of Window menu item to see which Windows open.**
- j. Demonstrate Grid system (Clients in grid, data below). By choosing a client form the Grid, all screens which are completed will contain info on that client.
- k. Screen Navigation (3 ways)
- l. Calendaring. Click ESC to get out of calendar.
- m. Mandatory fields, Date Ranging
- n. Re-ordering columns by Alpha or Date.
- o. Drop Down Fields, Multiple Choice Fields.
- p. History screen. Use as short summary.
- q. Concept of Client with one Master record, but he/she can be on multiple cases. Family - if case closed and client returns with different family composition, new case no. is issued.
- r. Alerts – Importance of and where located.
- s. All screens allow for printing.

III. Accessing the HMIS System

- a. Distribution of User ID’s and Passwords
- b. Terminal Services log in. Distribute procedure page and demonstrate

