

# HMIS USER NOTES



Remember that beginning this year, scoring on renewals for all HUD and other funded programs will be dependent upon HMIS certification which includes active participation in HMIS, meeting attendance, data timeliness, and participation in AHAR and PULSE Project reporting. Failure to do so will jeopardize funding for all in that category.

The HMIS workflow is an entry/exit workflow. If you do not follow the workflow correctly, it will cause errors in your HMIS data. Therefore it is essential that you enter data into HMIS using the workflow shown below.

1. If you enter data for several different programs, click the "Enter Data As" in the upper right corner of the screen and select the correct program.
2. From the Main Dashboard in ServicePoint, click on the *ShelterPoint* tab.
3. Click on the *Check Client In* tab.
4. To assign a bed, click the *Green Plus* icon or the *Empty* link and the Client Search window will display.
5. Search for the client in the Client Search screen. If the client is not in the system, add the client to ServicePoint.
6. If you are working with a family, click the black arrow to the left of Households Overview section to enter the family members and create a household.
7. To assign beds to household members, click the black arrow to the left of the Household Members section. Click the box next to each household member's name and then click on the Assign Unit button for each member of the household.
8. Create an ROI in the Release of Information section. Be sure to include all household members.
9. While in ShelterPoint complete the client's assessment.
10. If your agency is set up to enter services, enter services in the Multiple Services section.
11. Click on **Save and Exit** to return to the bedlist in Shelterpoint.
11. **Complete all the other household members assessments by clicking on their name in the bedlist in Shelterpoint.**

## HMIS ADVISORY GROUP

May 3, 2012  
September 6, 2012  
November 1, 2012

## HMIS USER GROUP MEETINGS

April 5, 2012  
August 2, 2012  
December 6, 2012

