
HMIS Support Manual - Client Visibility in HMIS



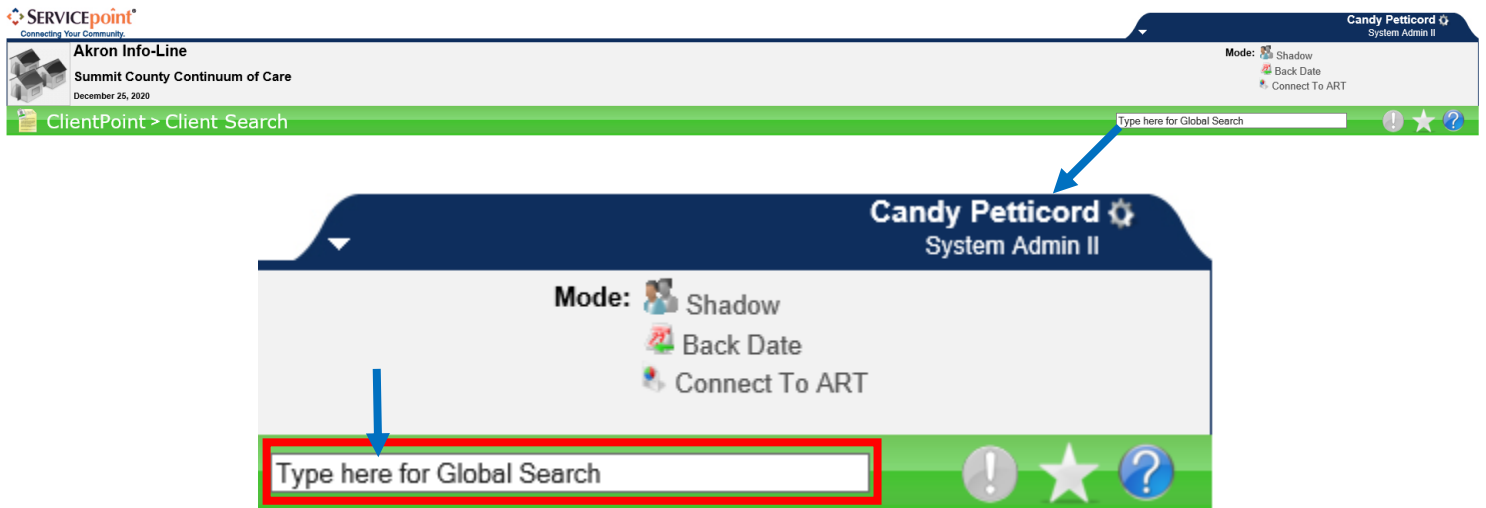
**Summit County, Ohio
Homeless Management Information System**



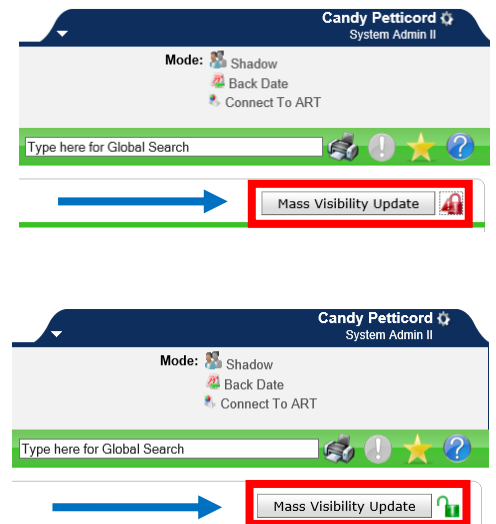
CLIENT VISIBILITY IN HMIS

Sometimes when working in HMIS, a User may experience difficulty in accessing a record for a known Client. Below are a few suggestions to help a User locate a Client record:

1. **Use the Search Bar:** An easy way to locate a client record is by using the **Global Search bar** located in the upper right corner of either the ClientPoint or ShelterPoint screens:



- a. To use the Global Search bar, simply type Client ID number and hit **Enter** on your keyboard
 - This can be done even if you're currently in another Client record or if you're in a report, etc.
2. **Locked Records:** Most old records that were created before 2013 have a **locked visibility**, meaning they can only be viewed by specific persons/agencies.
 - a. Before 2013, HMIS was a closed system and Client records were locked, even if the Client signed an ROI.
 - b. The HMIS program no longer operates in this manner therefore, as a rule of thumb, if it is suspected that the client might have been in HMIS prior to the current program entry, but the client can't be located in the system, please let HMIS staff know, so we can attempt to locate the Client record and unlock the record if it is permissible to help avoid record duplications.
 - c. Client records with the red visibility lock on the right upper corner but with a current ROI that is listed as "Yes" are able to have their visibility unlocked.
 - d. If such a record is encountered, please let HMIS staff know so the record can be unlocked (if permissible) which will allow it to be seen by other HMIS users and will help to prevent the creation of duplicate Client records.



CLIENT VISIBILITY IN HMIS

3. ROI: ROI's play a critical role in record visibility.

- a. The Client's record may have a **green open lock**, but if there is no ROI recorded for that person, most of their data is not visible to other HMIS users, which can cause confusion for other HMIS Users and/or duplication of the Client's information
- b. ROIs need to cover the entire time a Client is in a program
- c. In the example below, the ROI for this Client has insufficient coverage dates
 - The Client has a **Program Start Date** of 02/23/2017 and has not yet exited the program
 - The Client's ROI has an end date of 10/03/2018 and no new ROI has been entered since
 - Due to the missing ROIs, this Client's Entry Information and related data is not visible to others:

Release of Information				Entry/Exits			
Provider	Permission	Start Date	End Date	Program	Type	Project Start Date	Exit Date
D Grant Vouchers (CSS)	Yes	10/04/2017	10/03/2018	D Grant Vouchers (CSS)	HUD	02/23/2017	

- d. In the example below, the ROI errors have been corrected and the Client's record is now able to be seen by all HMIS Users:

- Please note that the "D Grant Vouchers" program has a new name – "Shelter Plus Care CSS I"

Release of Information				Entry/Exits			
Provider	Permission	Start Date	End Date	Program	Type	Project Start Date	Exit Date
Shelter Plus Care CSS I (CSS)	Yes	10/01/2018	09/30/2019	Shelter Plus Care CSS I (CSS)	HUD	02/23/2017	02/28/2019
Shelter Plus Care CSS I (CSS)	Yes	10/04/2017	10/03/2018	Rapid Re-Housing - Intake (UWSC)	HUD	02/13/2017	03/16/2017

4. Household Info: Household info needs to be up-to-date at program entry

- a. Outdated or incorrect household information needs to be corrected. For assistance with corrections, please let the HMIS staff know, we're here to help. 😊

I hope you found this manual helpful. 😊 Please feel free to reach out to me with any questions:

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