all Chicago
making homelessness history

HMIS New User Training

10:00 am	Context • Introductions • Agenda • What is All Chicago? • End user policy and code of ethics ○ Protecting your client's data and best practices
10:30 am	Consent Form • Consent for data sharing
10:50 am	ServicePoint • Logging on for the first time • Exploring the homepage dashboard
11:05 am	Intro to ClientPoint • Searching for, and creating a household with client(s)
11:20 am	Adding a Release of Information • Documenting client consent for data sharing • Locking records
11:35 am	Break
11:45 am	Documenting your Client Assessments • Which is the right assessment for you? • Overview of entry, interim, exit and sub-assessments
Lunch	
1:20 pm	Workflow Activity
2:10 pm	Assessing your Client • Documenting client demographics • Determining your client's housing situation • Does your assessment use conditional logic? • Completing sub-assessments • Adding interim reviews – updating assessment information • Completing the assessment for additional household members
2:45 pm	Break
2:55 pm	Adding Service Transactions, Case Managers, and Case Plans/Notes
3:20 pm	Exiting Clients
3:50 pm	Counts Report and Other Helpful Tools
4:10 pm	Getting started in the Live Site

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What does All Chicago do for users?

While you can get most of your work done in HMIS without our assistance, there are still a few things you need to contact us for, which you can do by emailing HMIS@AllChicago.org or submitting a Helpdesk ticket at: http://hmis.thechicagoalliance.org/hc/en-us/requests/new.

What you can do:

- Create, maintain and edit your client records
- Link and edit households
- Lock client records that are not shared with other agencies
- Build and run reports
- Create a counts report

What we do for you:

- Reset Passwords
- Lock restricted Records
- Give access to specific projects
- Assist in troubleshooting
- Troubleshoot reporting issues

Resources

ServicePoint – chicago.servicept.com

ServicePoint Training – chicago.servicept.com/training

HMIS Helpdesk – HMIS.TheChicagoAlliance.org

Get in touch with us at – HMIS@AllChicago.org / 773-669-4238

HMIS Partner Agencies – http://hmis.thechicagoalliance.org/hc/en-us/articles/208286516-HMIS-Partner-Agencies

Youtube Training Snippets – https://www.youtube.com/playlist?list=PLSwsELGIExwCcL7gmEgE_fTqwrejdcll2

Remember: You can click questions in HMIS to get further context

Acronyms

AHAR – Annual Homeless Assessment Report
APR – Annual Performance Report
ATA – Agency Technical Administrator
CES – Coordinated Entry System
CH – Chronically Homeless
CoC – Continuum of Care
ES – Emergency Shelter
ESG – Emergency Solutions Grant
EVHI – Ending Veteran Homelessness Initiative
HMIS – Homeless Management Information System
HoH – Head of Household
HPCC – Homeless Prevention Call Center
HUD – Housing and Urban Development
PATH Projects for Assistance in Transition from Homelessness
PSH – Permanent Supportive Housing
RHY – Runaway and Homeless Youth
ROI – Release of Information
RRH – Rapid Re-Housing
SH – Safe Haven
SHP – Supportive Housing Program
SRO – Single Room Occupancy
SSVF – Supportive Services for Veteran Families

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Data Entry Workflow

Client Profile

- ☐ Search for client
- ☐ If client record exists, continue with selected client(s)
- ☐ If no current profile, create record

Add Household

- ☐ Add Household, NOT ‘Only Client’
- ☐ Add additional members if not single
- ☐ Indicate relationships of household members
- ☐ Designate HoH

Add ROI

- ☐ Document Consent
- ☐ Document Supplemental Consent
- ☐ Document consent to share info with other CoCs

Add Entry

- ☐ Select (or confirm) the correct project and type
- ☐ Add Entry for all members of household
- ☐ Complete all sub-assessments
- ☐ Complete all HUD Verifications

Add Interims

- ☐ Add Interim assessment to existing Entry record
- ☐ Update relevant sub-assessments
- ☐ Add Interim assessments per your program requirements

Add Case Notes (Optional)

- ☐ Assign Case Manager
- ☐ Create Goal in Case Plans tab
- ☐ Add Case Notes as necessary to Goal

Service Transactions (Optional)

- ☐ If required, add Interim update assessment
- ☐ Add Service
- ☐ Update need status to ‘Closed and Met’

* Certain programs are required to use this (ie. SSVF, RRH, PATH, RHY)

Exiting

- ☐ Where is the client going?
- ☐ Update sub-assessments, as needed

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