HMIS User Cheat Sheet

	When this may be used…	Steps…
Edit a Client	to change a clients… Name, Date of birth/Quality, SSN/Quality, Gender, Race, Ethnicity and/or Family Name.	1. Find Client. 2. Go to HMIS Case Management Menu and select **Edit Client.** 3. Make changes/additions, and click **Save**.
Add a Master Assessment	to create a master assessment where you can link all individual assessments together.	1. Find Client. 2. Click on the **Action Gear** next to the Enrollment Record on the Dashboard. 3. Click on **View Case Members**. Find the client you wish to edit and click on **Action Gear** to edit. 4. Click on the **Magnifying Glass** next to Assessment "No Assessment selected". 5. A new window will open, click on the **Search** button at the bottom of the page. Click on the appropriate **Master Assessment** and hit **Save.**
Add as Assessment to an existing enrollment	capture assessments that are required by HUD.	1. Find Client 2. Go to HMIS Case Management Menu and click on **Assessments**. 3. Click on **he Action Gear next to the assessment you wish to edit.** 4. Click on View Related Assessments. 5. Select the Edit icon next to the assessment you wish to edit. 6. Edit/Add the assessment, click Save.
Link a Master Assessment to an Enrollment	when the entry assessment is not linked to the enrollment, therefore not reporting correctly. (all assessment must already be entered)	1. Find Client. 2. From the client Dashboard, click on the Action Gear next to the enrollment. 3. Select Link Assessments. 4. Click on the Magnifying Glass and search the Assessment you wish to link. 5. Select the appropriate Assessment Type, click Save.
Link an Exit Master Assessment to an Enrollment	when the exit assessment is not linked to the enrollment, therefore not reporting correctly. (all data must already be recorded)	1. Find Client. 2. Go to HMIS Case Management Menu and click on **Enrollments**. 3. Find the enrollment you wish to link and click on the **Action Gea**r, select **Exit the Enrollment.** 4. Click on the **Magnifying Glass** next to Assessment "No Assessment selected". 5. A new window will open, click on the **Search** button at the bottom of the page. Click on the appropriate **Exit Assessmen**t and select **Save**.
Edit a Universal Data Assessment	to add or edit a client's universal data information previously entered. (Disabling Condition, Veteran Status, Prior Residence, Length of Stay, Housing Status, Prior Zip Code/Quality, etc.)	1. Find Client 2. Go to HMIS Case Management Menu and hover over **Assessments**. 3. Click on **Universal Data Assessment.** 4. Click on the **Edit** icon next to the Assessment Record to be edited.
Add an Enrollment	to record an enrollment that was not previously entered when intake and assessments were recorded.	1. Find Client. 2. Go to the HMIS Case Management Menu and click on **Enrollments**. 3. Click on the **Add New** button at the top right corner.
Edit an Enrollment	to edit a client's enrollment information.	1. Find Client. 2. Go to the HMIS Case Management Menu and click on **Enrollments.** 3. Click on the **Action Gear** next to the record and select **Case Members**. 4. Click on **Edit** Icon.
Edit an enrollment at time of exit	to change or edit exit information on an enrollment. (date, destination etc.)	1. Find the client. 2. On the HMIS Case Management Menu click on **Enrollments.** 3. Click on the **action gear** next to the enrollment record and select **Case Members**. 4. Select **Exit the Enrollment.** 5. Make appropriate changes and **Save**.
Add a Family Member	to add a family member that entered the program at a later date. To add a new born child. To add a family member that was missed/forgotten at original time of entry.	1. Find the Head of Household. 2. Click on the **Action Ge**ar next to the Enrollment Record and select **Edit Enrollment Workflow.** 3. On Family Member page select **New Row** and enter client's information. 4. On the Program Enrollment page check **t**he box next to the **New Family Member.** Add **Enrollment Date.** 5. Continue through workflow clicking **Save/ No Changes.**
Exit one client within a Household	one family member within the household leaves/exits the program, but the household or additional family members stay in the program.	1. Find the client that you will be exiting. 2. Click on the **Action Gear** next to the Enrollment Record on the Dashboard. 3. Select **View Case Members**. 4. Click on the **Action Gear** next to the client you need to exit, select **Exit Enrollmen**t. 5. Enter date and exit information and **Save**.
Joining enrollments within Households	when clients within a family have separate enrollments that should be together.	1. Contact us to **Delete** all Enrollments for family members. 2. Find the Head of Household. 3. Go to Enrollments and at the **Action Gear** click on **Case Members**. 4. On the top right corner of the page click on **Copy Family.** 5. A small window will pop up indicating how many family members were added, make sure this is the Entire Family.

	When this may be used…	Steps…
Edit Exit Assessments	when a client has no interview completed	1. Find the client that you will be exiting. 2. Click on the **Action Gear** next to the Enrollment Record on the Dashboard. 3. Once you reach the Enrollment page click on the **Action Gear** and select **View Case Members**. 4. Click on the **Action Gear** next to the client you need to exit, select **Exit Enrollment**. 5. A new window will open, click on the **Search** button at the bottom of the page. Click **Add New***;* create an **Exit Assessment.**
Annual Re-Assessments	Due no more that 30 days before, or 30 days after, the anniversary of the head of household's "Project Start Date"	1. Find Head of Household Client. 2. Click on the **Action Gear** next to the Enrollment Record on the Dashboard. 3. Click on Update/Annual Assessment. Click **Save.** 4. On the Type of Assessment page,select **Annual.** 5. Enter information, click **Save.**
Referrals	Create or edit a referral for a client.	1. Find Client. 2. On the HMIS Case Management Menu click on **Referrals.** 3. On the Clients Referrals page you can click on the **Pencil** icon to Edit an Existing Referral or select **Add New** to add a New Referral
Case Notes	Record a case note for a client.	1. Find Client. 2. Go to HMIS Case Management Menu and click on **Case Notes.** 3. Select **Add New Case Note** to add a new note, or click on the **Action Gear** next to the record you want and select either **Review Case Note** or **Edit Case Note**. 4. To print, check the **Case Notes** you want, and click on **Print Selected.**
Case Load Reassignments	Reassign a client to a new case manager.	1. Go to the Home Workspace, select **Additional Tools,** then select **Case Load Reassignment** 2. On the Case Load Reassignment page select the **Client** you wish to Reassign and select a new **Case Manager** from drop-down menu to Reassign the Client.