

NC HMIS

Completing the client Release of Information and Referrals in HMIS

September 2016



North Carolina Coalition to End Homelessness

securing resources • encouraging public dialogue • advocating for public policy change

919.755.4393

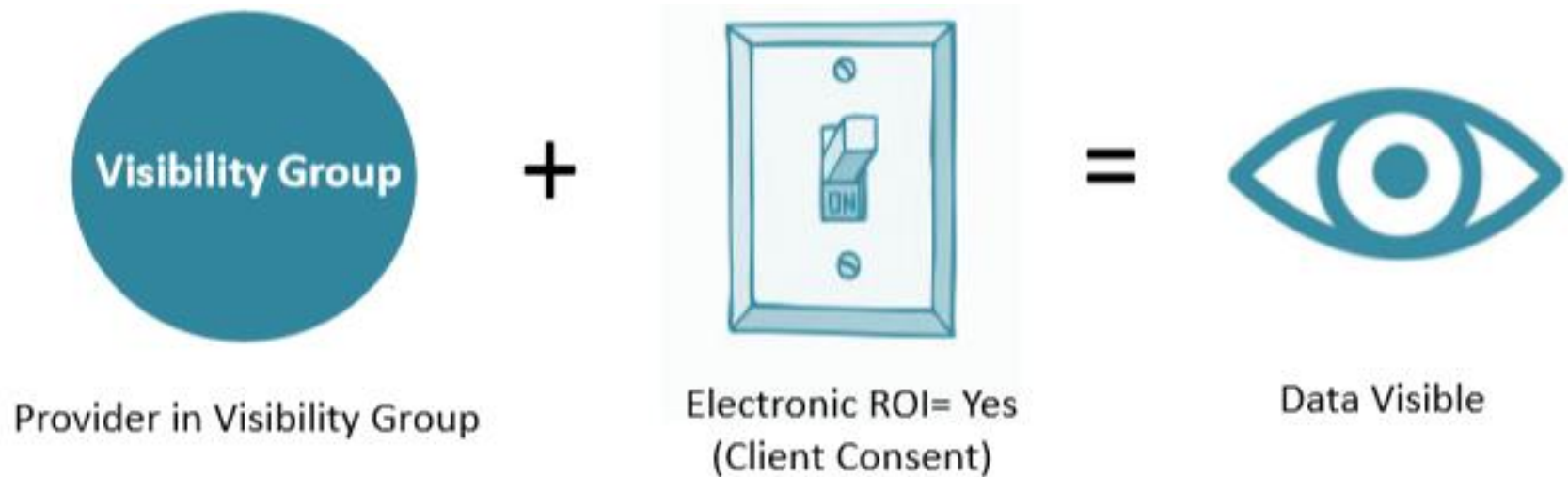
• www.ncceh.org

Welcome

- User Meeting check-in
 - How do AAs distribute information for end-users that cannot attend?
 - What would AAs need to ensure all HMIS users get updates and training materials?
- Remember to give us your feedback after the meeting

What does the ROI do?

- Clients always have to right to refuse sharing;
- No ROI = No sharing



What the ROI does not do

- Does not share client data with those outside your agency or sharing group
- Does not replace the paper client consent form for agencies that share data

Release of Information (ROI) in ServicePoint

- All clients for every project
- Good for one year
- Attach paper copy



***Do
not delete
old/expired
ROIs!***

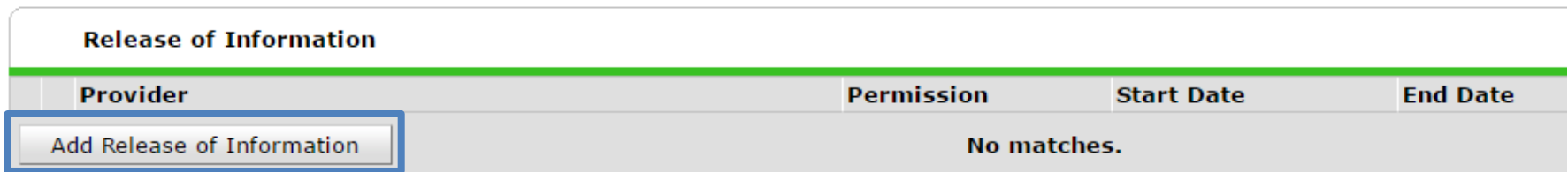
Adding a ROI to a client profile

- From the client profile screen, select either the ROI tab or the text by “Release of Information”



The screenshot shows a client profile for (26) Ball, Lucille. A blue box highlights the text "Release of Information: None" in red. To the right is a "-Switch" button. Below is a navigation bar with tabs: "Client Information", "Service Transactions", "Summary", "Client Profile", "Households", "ROI" (highlighted with a blue box), "Entry / Exit", "Case Managers", and "Case Plans".

- Click “Add Release of Information”



The screenshot shows the "Release of Information" section with a table. The table has columns: "Provider", "Permission", "Start Date", and "End Date". The "Add Release of Information" button is highlighted with a blue box. The table content shows "No matches."

Provider	Permission	Start Date	End Date
No matches.			







Adding a ROI to a client profile (cont.)

Household Members

i To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.

1 **(5) Married Couple (no children)**
 (26) Ball, Lucille
 (27) Arnaz, Desi

2 **Release of Information Data** Provider set to level 5

3 **Provider *** Wisteria Way - Rowan County - Emergency Shelter (7017) ▾
Release Granted * Yes ▾
Start Date * 09 / 16 / 2016   
End Date * 09 / 19 / 2017   
Documentation Signed Statement from Client ▾
Witness Andrea Carey


4 End date in 1 year in future


Save Release of Information **Cancel**

And you are done!

- Current ROI


Client - (26) Ball, Lucille


 (26) Ball, Lucille

Release of Information: **Ends 09/16/2017** 

- Needs new ROI


Client - (26) Ball, Lucille


 (26) Ball, Lucille

Release of Information: **Expired** 

- No ROI

Client - (26) Ball, Lucille

 (26) Ball, Lucille

Release of Information: **None** 

Referrals in Service Point

Referrals

- Record every referral in HMIS
 - Protects your agency and provides services faster for clients
- Need a current ROI for the client profile, the assessment and the receiving agency.
- Only complete for Heads of Households



Creating a Referral

(26) Ball, Lucille


Release of Information: Ends 09/16/2017


-Switch to Another Household Member- ▾ Submit


Client Information Service Transactions


Service Transaction Dashboard


1


 Add Need


 Add Service

 Add Multiple Services

 Add Referrals

 View Previous Service Transactions

 View Shelter Stays

 View Entire Service History

Creating a Referral

▼ **Add Needs**

▼ **Household Members**

i To include Household members for this Service Transaction, click the box beside each name. Only members from the SAME Household may be selected.

(5) Married Couple (no children)

(26) Ball, Lucille

(27) Arnaz, Desi

2 Only complete for Head of Household

Needs Assignment

i Select up to 5 Needs

Service Code Quicklist

- Case/Care Management (PH-1000)
- Eviction Prevention Legal Assistance (FT-4500.1800)
- Landlord/Tenant Dispute Resolution (FT-4500.4600)
- Rental Deposit Assistance (BH-3800.7250)
- Rent Payment Assistance (BH-3800.7000)
- Utility Assistance (BV-8900)

3 Add each Service

Creating a Referral



4

Referral Provider Quicklist

Provider		Add Provider
	Heading Home Housing - Rowan County - Rapid Re-Housing (7016)	Add the provider(s) for all of the selected services
	-Select-	
▼ Search for Pro	Family Crisis Council - Rowan County - DV Shelter - State ESG (4951)	
	GI - Career Connections (Rowan) (1612)	
	Heading Home Housing - Rowan County - Emergency Shelter (7015)	
i These Ser	Heading Home Housing - Rowan County - Rapid Re-Housing (7016)	
	Rowan Helping Ministries - Rowan County - Eagle's Nest - TH - Private (1363)	
	Rowan Helping Ministries - Rowan County - Emergency Shelter - State ESG (1049)	
▶ Refine Search	Rowan Helping Ministries - Rowan County - Shelter - Contract beds - VA (5541)	
	Wisteria Way - Rowan County - Emergency Shelter (7017)	
	Wisteria Way - Rowan County - Rapid Re-Housing (7018)	

Creating a Referral




Selected Providers

Provider ▲	Type	Phone	Location	Last Updated
  Heading Home Housing - Rowan County - Rapid Re-Housing	Level 5	Unknown	Salisbury, NC 28144	09/16/2016

Showing 1-1 of 1

Refer to Providers




Referral Data

5 Needs Referral Date ★ 09 / 16 / 2016    4 ▾ : 36 ▾ : 19 ▾ PM ▾

Referral Ranking

VI-SPDAT Score Please Select a VI-SPDAT Score

VI-FSPDAT Score Please Select a VI-FSPDAT Score

Projected Follow Up Date / /   

Follow Up User Wisteria Way - Rowan County - Emergency Shelter (7017)

6 [Check to notify ServicePoint Providers by Email.](#)

Optional tools for ranking referrals

Creating a Referral

7 Referrals [Send Summary](#)

Referred-To Provider	Case/Care Management	Rental Deposit Assistance	Referred Clients
Heading Home Housing - Rowan County - Rapid Re-Housing (7016)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(26) Ball, Lucille

▼ **Need Data**

8 **Date of Need*** 09 / 16 / 2016 4 : 36 : 19 PM

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
Case/Care Management (PH-1000)		Identified -Select- -Select-	
Rental Deposit Assistance (BH-3800.7250)		Identified -Select- -Select-	

[Remove All Needs](#)





9

Creating a Referral

▼ **Need Data**

Date of Need *

Selected Needs

Need	Need Status / Outcome / If Not Met, Reason	Notes
 Case/Care Man	Identified Select- Select-	
 Rental Deposit Assistance (BH-3800.7250)	Identified -Select- -Select-	

Need Notes

Notes

10

Client contact number: 919-220-5533

Referring staff: Andrea Carey
Contact number: 919-410-6697

Save Close

Remove All Needs

Save Needs ONLY Save ALL Clear ALL Cancel





Creating a Referral

Client Information | Service Transactions

Needs | Services | **Referrals** | Shelter Stays | Entire Service History

Previous Referrals

Select Dates: -Select- | Start Date: [] / [] / [] | End Date: [] / [] / [] | More | Search

	Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
 	09/16/2016	09/16/2016	Heading Home Housing - Rowan County - Rapid Re-Housing		Rental Deposit Assistance	Identified	
 	09/16/2016	09/16/2016	Heading Home Housing - Rowan County - Rapid Re-Housing		Case/Care Management	Identified	

Add Referral | Showing 1-2 of 2

Receiving a Referral

- Allows trackable communication between agencies for client needs
- Notice via “Agency Contact” email
 - If the box is checked at bottom of referral
- Referring and receiving agencies must share data for this to work











Receiving a Referral

- ▼ **Reports**
 - Audit Report
 - User Information
 - User Login
- AHAR
- Call Record Report
- Client Served Report
- Daily Unit Report
- Entry/Exit Report
- ESG CAPER (2016)
- ESG CAPER (2014)
- Fund Availability Report
- Needs Report
- PATH
- Referrals**
- Service Transaction

- ART
- ReportWriter
- SSVF 2014 Export
- Rhymis Export

- **Admin**
- Logout**

Provider Reports

 Annual Homeless Assessment Report (AHAR)	 Call Record Report	 Client Served Report	 Daily Unit Report
 ESG CAPER (2016)	 ESG CAPER (2014)	 Fund Availability Report	 Needs Report
 Referrals	 Service Transaction		

1

Receiving a Referral

2

Report Options

Use Previous Parameters

Provider *

This provider AND its subordinates
 This provider ONLY

Referral Type *

Referral Status Outstanding Closed ALL

Referral Outcome

Referral Date Range
 / /
 / /

Sort Order

1 week at a time

Report Results

Referral Date	Name	Group ID	Ranking	VI-SPDAT	VI-FSPDAT	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
09/16/2016 4:36:19 PM	(26) Ball, Lucille					Rental Deposit Assistance	Wisteria Way - Rowan County - Emergency Shelter	Heading Home Housing - Rowan County - Rapid Re-Housing		
09/16/2016 4:36:19 PM	(26) Ball, Lucille					Case/Care Management	Wisteria Way - Rowan County - Emergency Shelter	Heading Home Housing - Rowan County - Rapid Re-Housing		
09/16/2016 4:57 PM	(17) Sparrow, Jack					Case/Care Management	County Shelter	Heading Home Housing - Rowan County - Rapid Re-Housing		
09/16/2016 2:55:43 PM	(19) Smith, John Alvin		Medium			Case/Care Management	Wisteria Way - Rowan County - Emergency Shelter	Heading Home Housing - Rowan County - Rapid Re-Housing		

Showing 1-4 of 4




For Client Profile

For Referral Details







3

Receiving a Referral

Referral Data [Send Summary](#)

Referred-To Provider	Heading Home Housing - Rowan County - Rapid Re-Housing (7016)		
Needs Referral Date *	09 / 16 / 2016	  	4 : 36 : 19 PM
Referral Ranking	-Select-		
VI-SPDAT Score	Please Select a VI-SPDAT Score	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
VI-FSPDAT Score	Please Select a VI-FSPDAT Score	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
Referral Outcome	-Select-		

Follow Up Information

Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	  
Follow Up User	Heading Home Housing - Rowan County - Rapid Re-Housing (7016) <input type="button" value="-Select-"/>	
Follow Up Made	-Select-	
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	  

4 (points to Referral Outcome dropdown menu)

5 (points to Follow Up Made dropdown menu)

Receiving a Referral

The screenshot displays a software interface for managing referrals. It is divided into two main sections: 'Need Status and Outcome' and 'Service Information'. The 'Need Status and Outcome' section contains three dropdown menus: 'Need Status *' (set to 'Identified'), 'Outcome of Need' (set to '-Select-'), and 'If Need is Not Met, Reason' (set to '-Select-'). The 'Service Information' section features a 'Provide Service' button and an information icon with the text 'A Service has not yet been provided for this Referral.'. At the bottom, there are three buttons: 'Save', 'Save & Exit', and 'Exit'. Annotations include a blue circle with the number '7' pointing to the 'Service Information' section, a blue circle with the number '6' pointing to the 'Save' button, and a blue callout box with the text 'Save before adding the Service Transaction' and a downward-pointing arrow.

Need Status and Outcome	
Need Status *	Identified
Outcome of Need	-Select-
If Need is Not Met, Reason	-Select-

Service Information	
Provide Service	A Service has not yet been provided for this Referral.

7

6

Save before adding the Service Transaction

Save Save & Exit Exit

Receiving a Referral

Able to Serve the Client	
Referral Outcome	Accepted
Follow-up User	(You!)
Follow-up Made	Yes
Completed Follow-up Date	09/15/2016
Need Status	Closed
Outcome of Need	Fully Met
If Need is Not Met, Reason	-

Receiving a Referral

An Unsuccessful Referral	
Referral Outcome	Canceled
Follow-up User	(You!)
Follow-up Made	No
Completed Follow-up Date	-
Need Status	Closed
Outcome of Need	Not met
If Need is Not Met, Reason	Client canceled

Now you try!

- Pair up and get your example client notecard
- Log into the Training Site
 - nchmis.servicept.com/chin_training
- Refer your client to your partner's project
 - Then trade client ID numbers to complete the referral

ncceh.org/hmis

access local support for Balance of State, Wake, Durham, & Orange CoCs

919.410.6997 or **hmis@ncceh.org**

helpdesk for local support

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