

Outline for HMIS Training

1. Search for client in ServicePoint (SP)
 - A. Enter the first 3-4 letters of first name & 3-4 letters of last name *OR* enter client's Social Security number (all or partial)
 - B. Search for client
2. Select the correct client from the client list of possible matches.
(verify date of birth, social security number and/or name)
3. If no client criteria matches your client:
 - A. enter client demographics
 - B. Add client with this information
4. At this point, client's profile is created & client is assigned an ID #
 - A. Release of Information (**ROI**) - add release (start / end dates = 3 years)
 - B. enter client's demographic & assessment information as completely as possible
5. Updating any information for a client is done by clicking the *pencil* icon
6. Service Transactions
 - A. Past transactions are listed
 - B. Add need & service
7. "H" & "G" beside each entry
 - A. "H" shows the history of answer to a particular question
 - B. "G" goals can be established by clicking on the "G"
 1. established goals can be viewed under the "Case Plans"
(*separate trng for caser Mngrs*)
 - a. updates are made by clicking on the pencil
 - b. trash can icons will delete the entry
8. Goals
9. Reporting