

HPRP/HMIS Tip of the Week #15 Entering Clients

The HPRP workflow recently released is similar to the combined one, but neither of them really addresses the issue of how to deal with entering clients who already exist in the database. Another scenario not addressed is when you have a household where some folks are already in the database and some aren't. This Tip aims to clear up how to be sure all your clients, whether repeats or newbies, are entered completely and correctly.

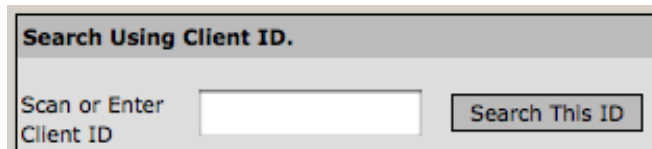
What is a Client ID?

A client ID is a sequential number assigned by the database to a specific person. There are two exceptions to the following statement: every person served by any provider within the balance of state should have only one client ID. The first exception is for anonymous clients. An anonymous client will likely have more than one client id, especially if s/he is using multiple agencies. The second exception is when a client agrees to have personally identifying information entered into HMIS but not shared to other agencies. Shelter-side clients have to sign ROIs (Release of Information) which give a client the power to control how his/her information is shared to other agencies. Similar to anonymous clients, the clients who say yes to allowing personally identifying data entered but not shared will possibly have more than one client id for one person. It is completely ok if clients have more than one client ID as long as they fall under one of these two exceptions. But otherwise, any client who has agreed to share their data (most clients) will have only one client ID.

As a result, in the database, there is a running history of each client's separate housing crises, no matter the provider. You most likely cannot see other providers' entry/exits if they are not in your provider tree (permissions), but they are there.

What if I am moving a client from my shelter into housing from HPRP?

In this case, you will locate the client ID they are using for your shelter, type it into the field pictured in Figure 1 and click "Search this ID". You can find this field by clicking on ClientPoint after you have logged in and verified that you are entering data as your HPRP provider.



The image shows a software interface window titled "Search Using Client ID." It contains a text input field with the placeholder text "Scan or Enter Client ID" and a button labeled "Search This ID".

Figure 1: Client ID Search field

How do I enter a person into my HPRP program that's already been served with other services (including shelter, transitional housing, an HPRP episode, etc.)?

Continuing with the previous example, that client's record will come up (as long as they allowed their data to be shared between agencies) and you may see that some of their data is already filled in. You may or may not see any entry/exits into other programs. You may or may not see any previous service transactions.

If the person's household configuration has changed, you will Create New Household. (See Tip on Households here: http://www.cohio.org/info_training_materials.php (click on HPRP HMIS Tips of the Week, then #12.) If other household members are already in the database as well, you will use their Client IDs if you know them or you will search for them by name and click them into the household until you have all your household members there.

Assess this client as you would any other. For any data that is filled in that is not true anymore, you will simply make sure your Assessment Date matches the date of your assessment and entry into your program (and that you are backdated if necessary), and change any data elements that have changed. Also save data to any fields that are required for HPRP that are not filled in. You will save over the previous data.

In the Service Transactions section, if you see services for a past episode, just leave them there and enter the services

Ohio Balance of State HPRP

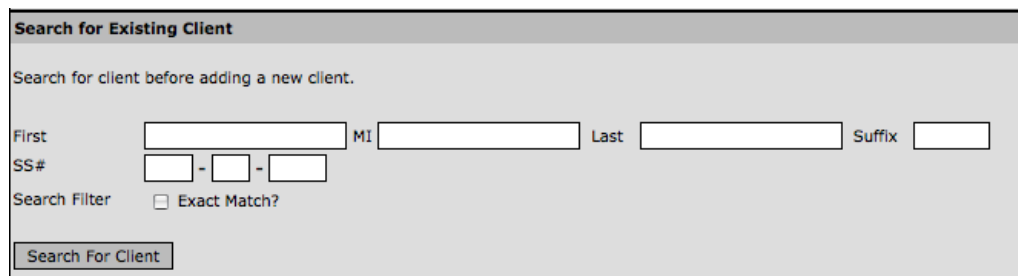
you are giving to the client as you would any other client. Your services should fall between the entry/exit that you created for this episode.

What if I do a search on a client and I see duplicate (or triplicate or more) clients in the database?

Call me or email me and give me the Client IDs of the du/triplicates. We handle this here because we are connected to the Ohio Balance of State provider, which can see everything all Level 2 and 3 and 4 providers can see. This prevents us from accidentally deleting or merging clients of other agencies without their knowledge. I will have the clients merged and let you know which one to use.

I entered my client's Client ID but it says it does not exist in the database.

Try searching the client by name and/or SSN (Figure 2). If you find your client by name and s/he has a different Client ID, it may be that it had been a duplicate client that was merged. Change the client ID recorded in the client's file folder to match the new number. If you still don't have any luck finding the client, call or email me.



Search for Existing Client

Search for client before adding a new client.

First MI Last Suffix

SS# - -

Search Filter Exact Match?

Figure 2: Client Search by Name

Which HPRP clients are to be entered into HMIS and which clients are not to be entered?

Any client who receives HPRP funds should definitely be entered into HMIS. Also, if a client is given a case management plus any other service, you may enter them into HMIS. For example, you are moving a household out of shelter into housing. You score housing for them, but the lead inspection fails. The family decides they don't care about lead, they just want affordable housing and not shelter. Your HPRP dollars cannot pay their rent, however, you did successfully give them a Housing Search and Placement service to go along with the case management. This household should be entered into HMIS. The clients you cannot enter are those for whom you only did case management and nothing more.

For clients who receive an assessment and they turn out to be ineligible or other circumstances cause them not to actually receive further HPRP services, do not enter these clients into our HMIS. It is advisable, however, to track this information anyway because you may be able to report out on the amount of time spent doing intake assessments for ineligible clients. It might also be useful to have this information on those who are not qualifying to possibly report out on where your program could be falling short of serving the community. HUD has not been clear on this issue, but it may be clarified on a future date.

Also, any provider that is considered a Domestic Violence shelter cannot enter any clients into the Ohio Balance of State HMIS, anonymous or not.

Comments, questions, and feedback are welcome. If you would like to not receive "HPRP HMIS Topic of the Week" anymore, or would like to be included, please email genelledenzin@cohhio.org.