

LANDLORD RISK MITIGATION FUND PILOT

INSTRUCTIONS FOR HMIS DATA ENTRY

Last Updated: 2/16/2018

FINDING OR CREATING A CLIENT'S RECORD IN HMIS

1. Click on "Enter Data As" (EDA) and select your Landlord Risk Mitigation Fund pilot provider ID.
2. In ClientPoint, fill out search prompts for client to see if a client record already exists.
 - a. If a client record exists, click on that client record to enter it and continue with project data entry.
 - b. If there are no matching results, create a new client record. Fill in as many of the search prompts as you can before clicking on "Add New Client With This Information."
 - c. If creating a Household, refer to the [Household How-To Guide](#) and follow the instructions discussing how to create a Household.

Note: If you are receiving a client ID through Coordinated Entry, enter the client ID into the Client ID # field and click Submit.

3. Backdate to the client's project start date (in pop-up or by clicking on "Back Date").
4. Click on the **Client Profile** tab and complete the **Universal Profile** data elements.

Client - (1060027) Pilot, LRMF 🔒

(1060027) Pilot, LRMF Date: 10/01/2017 12:00:00 AM
 Release of Information: None

Client Information Service Transactions

Summary **Client Profile** Households ROI Entry / Exit Case Managers Case Plans Assessments

Universal profile 🔒

Relationship to Head of Household	Self (head of household) G
Date of Birth	<input type="text"/> / <input type="text"/> / <input type="text"/> 🔄 🔄 🔄 G
Date of Birth Type	Full DOB Reported (HUD) G
Gender	Male G
Race 1	Client refused (HUD) G
Race 2 (Optional)	-Select- G
Race 3 (Optional)	-Select- G
Race 4 (Optional)	-Select- G
Race 5 (Optional)	-Select- G
Ethnicity	Client refused (HUD) G
Agency's client ID #	<input type="text"/> G

It is the responsibility of the agency with the first signed ROI to enter the date signed below. Do not override.

Date of ROI Consent	10 / 01 / 2017 🔄 🔄 🔄 G
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5. Scroll to the bottom of the page and click Save.
6. If you are continuing with data entry now, move to the below section: Creating an Entry/Exit, and start with step 4. If you are continuing with data entry at a later date, move to the below section and start with step 1.

CREATING AN ENTRY/EXIT

Project Start Date is the date the client meets eligibility criteria and indicates they wish to be in the project.

1. Click on “Enter Data As” (EDA) and select your Landlord Risk Mitigation Fund Pilot provider ID.
2. Enter the client’s record.
3. Backdate to the client’s project start date (in pop-up or by clicking on “Back Date”).
4. Click on the **Entry/Exit** tab.
5. Click on **Add Entry/Exit**.

Client - (1060027) Pilot, LRMF

(1060027) Pilot, LRMF Date: 10/01/2017 12:00:00 AM
Release of Information: None

Client Information Service Transactions

Summary Client Profile Households ROI **Entry / Exit** Case Managers Case Plans Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Add Entry / Exit						No matches.

Exit

6. Select **Basic** as the **Type** and click Save and Continue.

Project Start Data - (1060027) Pilot, LRMF

Household Members

This Client is not a member of any Households.

Project Start Data - (1060027) Pilot, LRMF

Provider* Housing Agency-CoC-Landlord Risk Mitigation Fund Pilot (4927) Search My Provider Clear

Type* **Basic**

Project Start Date* 10 / 01 / 2017 12 : 00 : 00 AM

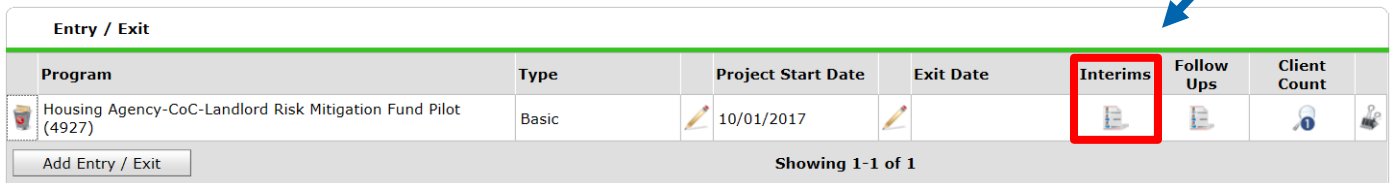
Save & Continue Cancel

- Complete the Landlord Risk Mitigation Fund Entry assessment for each member of the household, clicking Save after completing for each household member.
- After completing for the last household member, scroll to the bottom and click Save & Exit.

ADDING A HOUSING MOVE-IN DATE USING THE INTERIM REVIEW FUNCTION

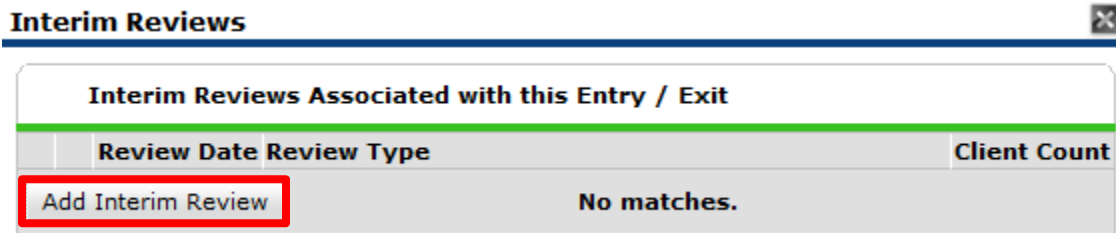
The date a client moves into housing should be recorded using the Interim Review function.

- Click on “Enter Data As” (EDA) and select your Landlord Risk Mitigation Fund Pilot provider ID.
- Enter the Head of Household’s record.
- Backdate to the information date (in pop-up or by clicking on “Back Date”).
- Click on the **Entry/Exit** tab.
- Click on the **Interims** icon.



Entry / Exit							
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
Housing Agency-CoC-Landlord Risk Mitigation Fund Pilot (4927)	Basic	10/01/2017					
Add Entry / Exit		Showing 1-1 of 1					

- Click on **Add Interim Review**.



Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
Add Interim Review		
No matches.		

- Select **Update** as the **Interim Review Type** and click Save & Continue.

Add Interim Review - (1060027) Pilot, LRMF



Interim Review Data	
Entry / Exit Provider	Housing Agency-CoC-Landlord Risk Mitigation Fund Pilot (4927)
Entry / Exit Type	Basic
Interim Review Type *	<div style="border: 1px solid black; padding: 2px;"><p>-Select-</p><p>30-Day Review</p><p>60-Day Review</p><p>90-Day Review</p><p>120-Day Review</p><p>6 Month Review</p><p>18 Month Review</p><p>24 Month Review</p><p>1 year</p><p>Annual Assessment</p><p>Update</p></div>
Review Date *	<div style="display: flex; align-items: center;"><div style="margin-right: 5px;"></div><div style="margin-right: 5px;"></div><div style="margin-right: 5px;"></div><div style="margin-right: 5px;">12</div><div style="margin-right: 5px;">:</div><div style="margin-right: 5px;">00</div><div style="margin-right: 5px;">:</div><div style="margin-right: 5px;">00</div><div style="margin-right: 5px;">AM</div></div>

Save & Continue Cancel

8. Update the assessment by entering the Housing Move-In Date under the Head of Household's record.
9. After completing scroll to the bottom and click Save and Exit.
10. A screen will pop-up showing the newly created Interim Review. Click Exit.

CREATING A SERVICE

Create a Service when a claim is submitted. There should be one Service for each claim submitted. If the amount of the claim changes after submission, return to that same Service and update the amount in the Amount field. The Service Start Date should be the date a claim is submitted, and the Service End Date should be one day AFTER the Service Start Date.

1. If you are not already in EDA mode for your project provider, click on "Enter Data As" (EDA) and select your Landlord Risk Mitigation Fund Pilot provider ID.
2. Enter the Head of Household's record (Services should only be recorded in the Head of Household's record, but each current household member should be included in the Service).
3. Backdate to the information date (in pop-up or by clicking on "Back Date").
4. Click on the **Service Transactions** tab.
5. Click on **Add Multiple Services**.

Client - (1060027) Pilot, LRMF

(1060027) Pilot, LRMF Date: 11/01/2017 12:00:00 AM
Release of Information: None

Client Information **Service Transactions**

Service Transaction Dashboard

Add Need Add Service **Add Multiple Services** Add Referrals View Previous Service Transactions

View Shelter Stays View Entire Service History

6. Include all household members who are currently in the household by checking the box next to their name.

Household Members

To include Household members for these Services, click the box beside each name. Only members from the SAME Household may be selected.

(226107) Male Single Parent
 (1062552) Demonstration, LRMF
 (1064133) Demonstration, LRMF

7. Complete the **Start Date** and **End Date** fields.

- a. The Service Start Date should be the date a claim is submitted. The Service End Date should be one day AFTER the Service Start Date.

8. Select the appropriate **Service Type**. (You will also see Housing Search and Information available, but this should not be selected for a Claim).

<i>On-the-Ground Service (Claim)</i>	<i>Service Type</i>
Repairs	Repair Services
Non-payment of rent	Service Cost Payment Assistance
Storage	Household Goods Storage
Utilities	Utilities

9. Click on **Add Funding Source**.

10. Click on the green plus sign next to **Landlord Risk Mitigation Fund**.

11. Enter the amount of the service in the **Amount** field. (If the Amount changes later, return to this field in this Service and update the Amount here).

Apply Funds for Service

Funding Sources

Source	Amount
Landlord Risk Mitigation Fund	\$ <input type="text"/>

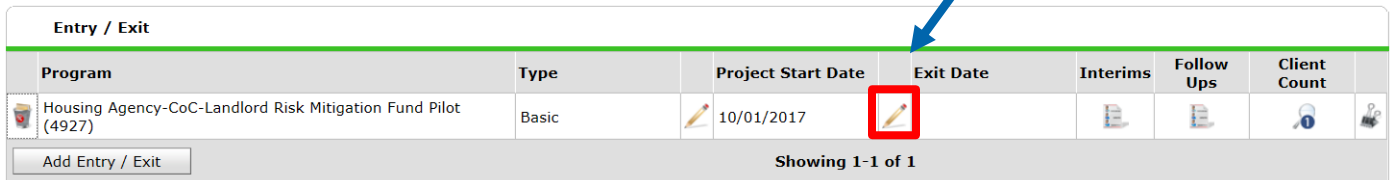
Add Funding Source Calculate **Total: \$0.00**








12. Click Save and Exit.

EXITING A CLIENT

A client should be exited once they stop receiving services or 12 months after their Housing Move-In Date, whichever comes first.

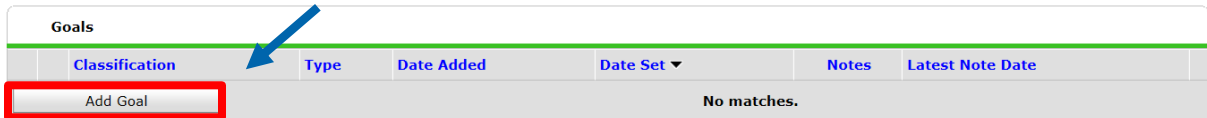
1. Click on “Enter Data As” (EDA) and select your Landlord Risk Mitigation Fund Pilot provider ID.
2. Enter the client’s record.
3. Backdate to the client’s project exit date (in pop-up or by clicking on “Back Date”).
4. Click on the **Entry/Exit** tab.
5. Click on the edit pencil to the left of the **Exit Date** field.



Entry / Exit							
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
 Housing Agency-CoC-Landlord Risk Mitigation Fund Pilot (4927)	Basic	 10/01/2017					

Add Entry / Exit Showing 1-1 of 1

6. Select the appropriate **Destination** from the dropdown menu and click Save & Continue.
7. Complete the Landlord Risk Mitigation Fund Exit assessment for all household members, clicking Save after completing for each household member.
8. After completing for each household member, scroll to the bottom and click Save and Exit.
9. Next you will add a goal. Make sure you are in the Head of Household’s record.
10. Click on the **Case Plans** tab.
11. Click on **Add Goal**.



Goals					
Classification	Type	Date Added	Date Set	Notes	Latest Note Date
No matches.					

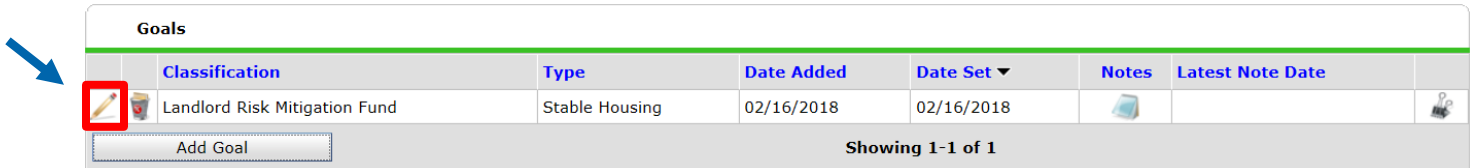
Add Goal





12. In the Goal pop-up, the Head of Household should be checked. Uncheck any other household members as you are only adding a goal for the Head of Household.
13. Complete the following fields within the Goal:
 - **Provider:** This will be your provider you are in EDA mode to and should be your Landlord Risk Mitigation Fund provider.
 - **Date Goal was Set:** This date must match the client’s Project Exit Date (as entered in the Entry/Exit tab).
 - **Classification:** Select **Landlord Risk Mitigation Fund**.
 - **Type:** Select **Stable Housing**.
 - **Target Date:** Add 6 months to the date you entered for “Date Goal was Set”.
 - **Overall Status:** Select **Identified**.
 - **Projected Follow Up Date:** Add 6 months to the date you entered for “Date Goal was Set”. This date should match the Target Date.
 - **Follow Up User:** Select the user at your agency who will receive a follow-up alert on their HMIS homepage.
14. Click on Add Goal.
15. Click on Save & Exit.

GOAL FOLLOW-UP

Use these steps to record the Follow Up for the 6-month goal.

1. Click on “Enter Data As” (EDA) and select your Landlord Risk Mitigation Fund Pilot provider ID.
2. Enter the client’s record.
3. Backdate to the information date (in pop-up or by clicking on “Back Date”).
4. Click on the **Case Plans** tab.
5. Click on the edit pencil to the left of the Goal being followed-up on.



Goals							
	Classification	Type	Date Added	Date Set	Notes	Latest Note Date	
	 Landlord Risk Mitigation Fund	Stable Housing	02/16/2018	02/16/2018			
<input type="button" value="Add Goal"/>		Showing 1-1 of 1					

6. Complete the following fields within the Goal:
 - **Follow Up Made:** If a Follow Up was made or attempted, select **Yes**. Only select **No** if the agency did not attempt a Follow Up.
 - **Completed Follow Up Date:** Enter the same date as **Target Date**
 - **Outcome at Follow Up:** Select the appropriate response, limiting your response to one of these options:
 - **Achieved**
 - **Not achieved**
 - **Unknown-unable to contact**
7. Click Save & Exit.