GENERAL HMIS INSTRUCTIONS

Contents

Institute for Community Alliances

GENERAL INFORMATION

HMIS HELPDESK INFORMATION

The HMIS Helpdesk is operated by Institute for Community Alliances (ICA) as the lead agency for the State of Minnesota. Contact the Helpdesk with any and all data entry and/or reporting questions. Whenever "Helpdesk" is referred to in this guide, the below information will be helpful to know:

- Helpdesk Email: mnhmis@icalliances.org
- Helpdesk Hours: Monday through Friday, 8:30a-4:30a
- Closed for major holidays

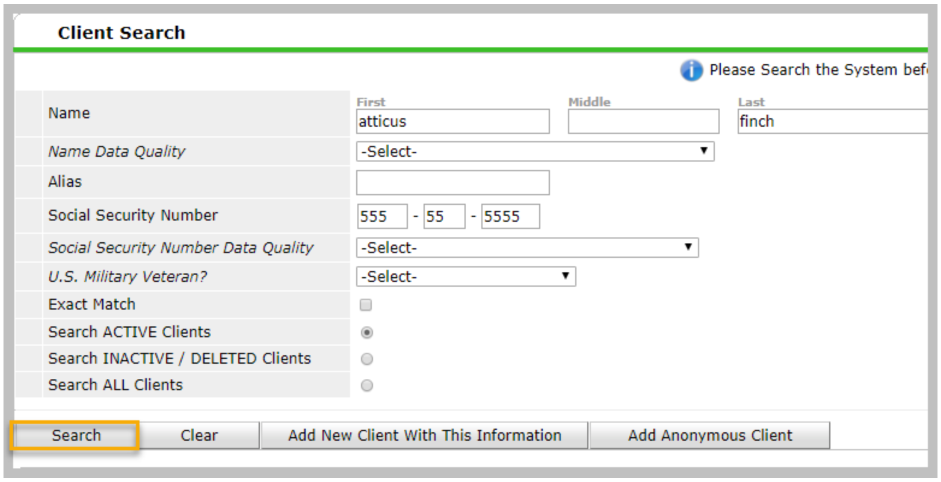
LOCKED OUT OF SERVICEPOINT/HMIS?

- You will be prompted to reset your password every 45 days for security purposes. Passwords are required to have at least 8 characters and 2 numbers.
  - **Remember**, do not save passwords to your computer as this violates the user agreement that you signed.
- Email the HMIS Helpdesk (mnhmis@icalliances.org) so that we can reset your password. We make sure to prioritize password resets so that you can quickly get back to data entry with minimal disruption.
  - Users **CANNOT** reset their passwords without contacting the Helpdesk.

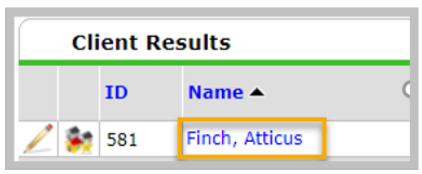
SEARCHING FOR A CLIENT

1. Enter **EDA mode** (See Enter Data As Mode section for more information) as the correct provider and open the client's record in **ClientPoint.**

2. Search at least three different combinations of search prompts to locate a client record before creating a new client record.



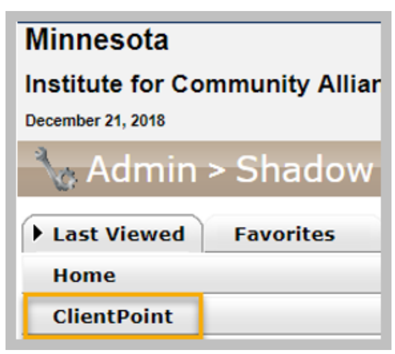
3. **If no client results match** the client you're looking for, continue to the Creating a Client Record section.
4. **If there is a match in the Client Results**, click on the client's name and continue with data entry.



CREATING A CLIENT RECORD

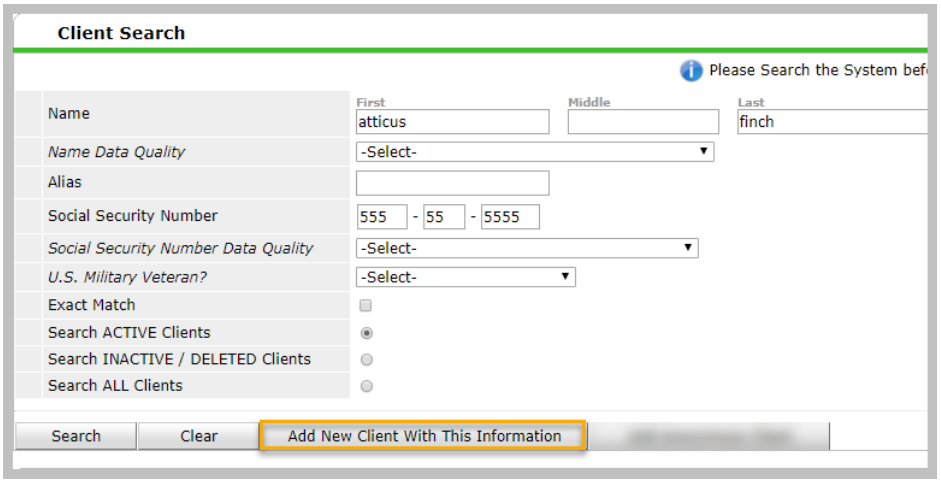
If you have searched for a client with three different combinations of search prompts with no successful search results, your next step is to Create a New Client Record.

1. Enter **EDA mode** (See "Enter Data As Mode" section for more information) as the correct provider and open the client's record in **ClientPoint.**

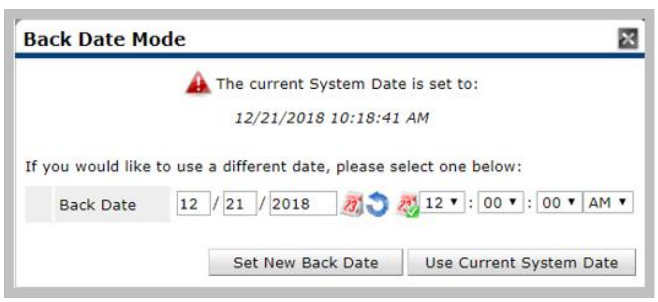


2. Make sure that the client is not already in HMIS by searching for different combinations of their information.

3. Click on **Add New Client With This Information**.
    a. **Quick Tip:** Having adequately searched the system for existing records, before you click on Add New Client with This Information, complete the available fields in full (Name, Name Data Quality, Alias (if applicable), Social Security Number, SSN Data Quality, and U.S. Military Veteran). If the client has consented to participate in statewide data sharing, enter the word **SHARED** in the **Alias** field (See Documenting the Release of Information (ROI) section for more information).



4. When prompted, enter the date of the client's entry into the project and select **Set New Back Date**. If the client entered the project today, you can select **Current System Date**. (The date can be changed by clicking on **Back Date** in the top-right corner of the screen).



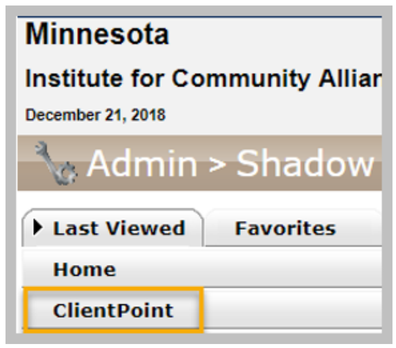
5. Select the **Client Profile** tab and enter any information missing from the **Universal Profile Assessment**.
    a. **IMPORTANT:** If a client has agreed to statewide data sharing, enter a Date of ROI Consent.

6. If the client is being served with other household members, click on the **Households** tab and either add them to an existing household or create a new household (See Create a Household section for more information).

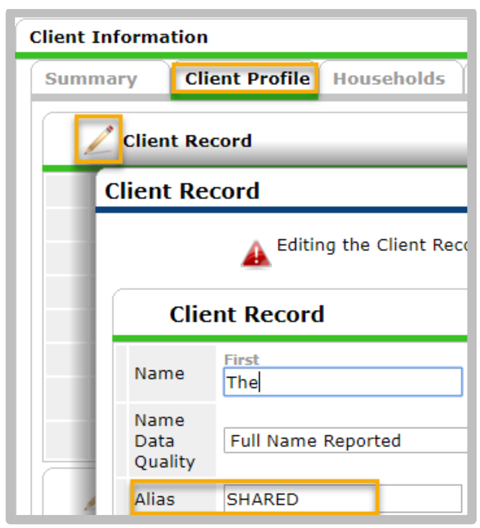
DOCUMENTING THE RELEASE OF INFORMATION (ROI)

Projects participating in Statewide Data Sharing should give households the opportunity to participate in Statewide Data Sharing by presenting the HMIS Release of Information. The ROI should be documented upon client creation, but can be completed later through Back Date Mode if this step was missed initially. See step-by-step instructions below for whether the client consents or does NOT consent to Statewide Data Sharing.

1. Enter **EDA mode** (See "Enter Data As Mode" section for more information) as the correct provider and open the client's record in **ClientPoint.**



2. In the **Client Profile** tab, click the **Edit Pencil** to enter SHARED in the **Alias** field.



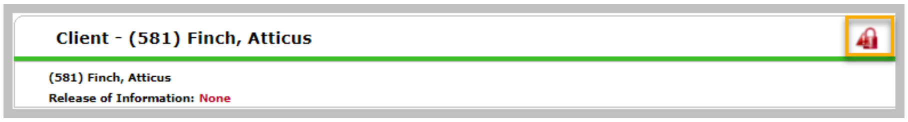
3. Complete the **Date of ROI Consent** field.

   a. If there is a date already entered in Date of ROI Consent field, **DO NOT OVERRIDE!**

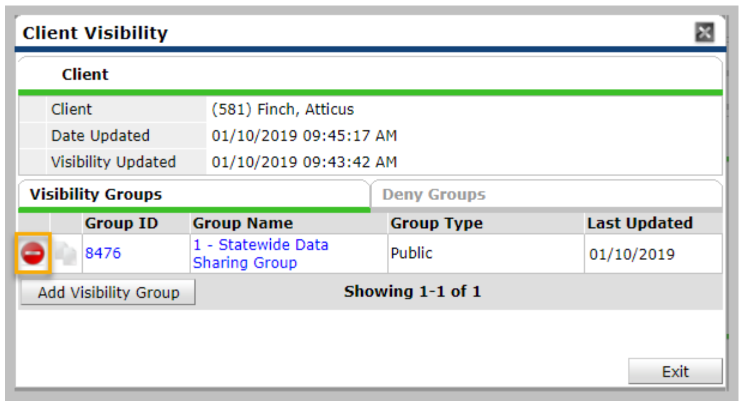
4. Click Save & Exit.

IF A CLIENT DOES NOT CONSENT TO SHARING

1. Enter **EDA** to your project provider that created the client. You should not be able to, nor should you, close a client record to Statewide Data Sharing on behalf of another agency or provider.
2. Enter the client's record.
3. No need to Back Date, so click **Use Current System Date** in the Back Date popup
4. Click on the **Client Visibility lockbox**.



5. Remove the Statewide Data Sharing Group by clicking on the **red circle**.



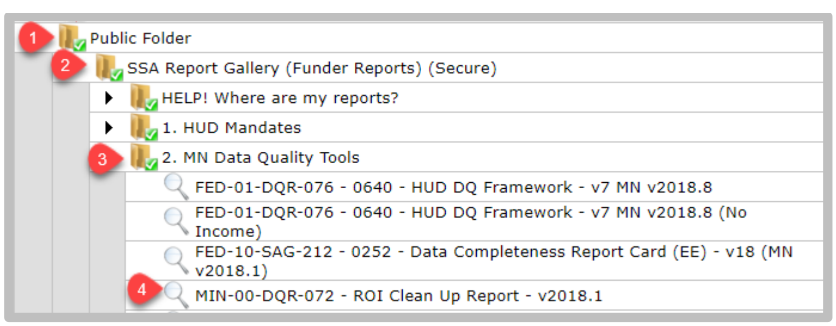
6. Click **Exit.**

Note: Please contact the Helpdesk if you need assistance with closing a client's record.

ROI CLEAN-UP REPORT

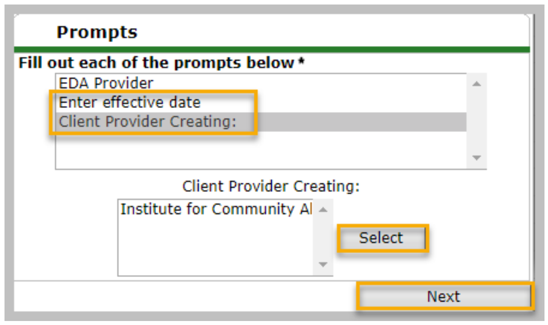
Do you want to ensure your client records have proper documentation of a consented ROI? We have a report to assist you in this effort. This report identifies every client created by a selected provider since 10/3/2016 (the day Minnesota's HMIS started sharing client records statewide).

1. Schedule the **ROI Clean Up Report** located in ART.
   a. Click the **magnifying glass** to the left of the report you wish to run.



   b. Click **Schedule Report**

2. In the pop-up, fill out the report prompts below:
    a. Choose the **Effective Date** (Same date as End Date)
    b. Choose the HMIS Provider that you'd like the report ran for by highlighting **Client Provider Creating** and clicking **Select**.
    c. Once you have both prompts filled out appropriately, click **Next**.



3. Respond to schedule report prompts in the pop-up to indicate HOW you want the report to send.

Name	You can change the name of the report file (you may leave as is)
Report Format	Select PDF or Excel
Users Inbox	Your Name (leave as is)
Interval	In most instances, you will want to select "Once." However, if there is a report you like to run frequently, you can schedule the report to run automatically on a daily, weekly, or monthly basis. If you want the report to run in an interval other than "Once," be sure to change the start date and end date prompts to set a recurrence pattern for ART to automatically generate a report.
Start/End Date	In most instances, you will leave as current date and time (this is when you want the report to run). However, if you selected an option other than "Once" for the interval prompt, be sure to change the start date and end date prompts to set a recurrence pattern for ART to automatically generate a report.

STATEWIDE DATA SHARING AND 6- VS. 7-DIGIT CLIENT IDS

What is Statewide Data Sharing? (Effective 10/1/2016)

- Sharing client records across the entire state.
    - Example: If a client is served in Duluth and then moves to St. Cloud, their client record will likely be available in HMIS to staff in St. Cloud to work with.
- A way to facilitate referrals within HMIS for Coordinated Entry purposes, and between agencies.
- Sharing is controlled by the client using the HMIS Release of Information (ROI).
- If a client does not consent to share their information, they still must be entered into HMIS but have their record closed (See Documenting the Release of Information section for more information).

What is the difference between 6- and 7-Digit Client IDs?

1068769
377194

- For clients that enter your project on or after 10/1/2016, only use Client Records whose client ID is 7 digits, as these are clients created with the new visibility arrangements for Statewide Data Sharing.
    - If you find a record that matches all of your search criteria for a client entering your program, but the ID number is less than 7 digits, you'll want to create a new client record.
- A 7-digit number does not automatically indicate that the record is shared, just that the record was created after statewide data sharing was implemented.
    - ALL new records created on or after we open the system will have a 7-digit number. You will see all of your own 7-digit records, even those that are closed.
- If your provider is a **closed provider** (not participating in statewide data sharing), you can continue to use your existing closed records (less than 7 digits) even for new enrollments.
- You can only make a Coordinated Entry referral in HMIS with an open, 7-digit client ID.

Example: My agency served Joe 5 years ago. The client record from that stay will be <7 digits and only my agency will see it. Another agency creates a new, open, 7 digit record for Joe after we open the system to statewide data sharing. If Joe returns to my program, I will look him up and see both records. When determining which record to use now, I will look for the 7 digit record, as that indicates the client was given the HMIS ROI and made a decision as to whether or not to share their individual data statewide.

ADDITIONAL RESOURCES

- **Correctly Documenting a Consented ROI:** https://hmismn.org/news/correctly-documenting-a-consented-roi-in-hmis/
- **ROI FAQs:** https://hmismn.org/s/ROI_FAQ.pdf
- **HMIS ROI-Client Revokes Consent, or Vice Versa:** https://hmismn.org/news/hmis-roi-client-revokes-consent-or-vice-versa/

ENTER DATA AS (EDA) MODE

WHEN DO I USE ENTER DATA AS (EDA)?

- When inputting data into ServicePoint, remember to always select the correct "Enter Data As", or EDA, provider.
- You should click on **Enter Data As** to enter EDA mode **every time** you login to ServicePoint for data entry, and before searching for or creating any new client record.
- You should be in EDA mode to the specific provider where the client is being served.

- You should NEVER be entering client data into a provider that says "(no data entry)" in the name.
- Approximately 10% of HMIS Users in Minnesota have a project provider as their home provider. A project provider is a provider that is intended for data entry.
    - For these users, they can think of themselves as in default Enter Data As mode to this provider and can ignore data entry instructions that say "Click on Enter Data As" if they do not need to switch providers.
    - If your home provider displayed in the top left at login does NOT say "(no data entry)," and follows the project provider naming convention, your assigned home provider is a project provider. This means **you do not** have to use EDA mode every time you do data entry for that specific provider.

Note: You do not need to be in EDA mode to run reports in ART.

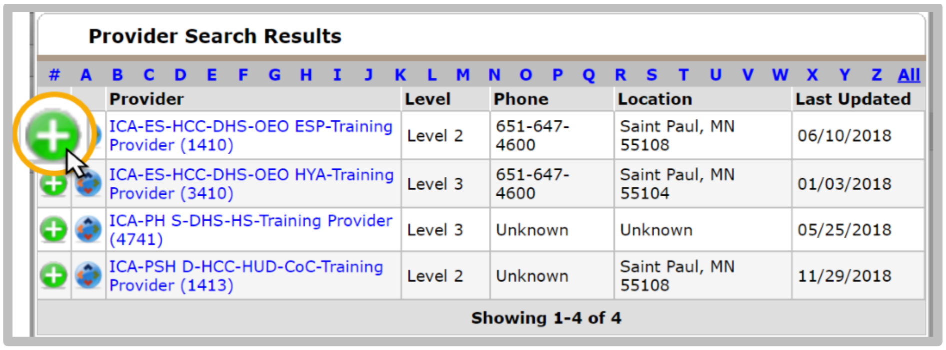
WHY IS ENTER DATA AS (EDA) IMPORTANT?

- Each provider is set up to specifically meet all your needs when it comes to the correct assessment, workflow, etc.
- If you fail to use the EDA function, you may not see the correct data entry tabs, modules, or assessments to be compliant with your program requirements, and correct visibility of your data *may* not be applied in order to correctly pull into your reports.
- If you entered data and forgot to use Enter Data As properly, contact the Helpdesk and we can instruct you as to whether or not re-entry of that data is necessary.

HOW DO I USE ENTER DATA AS MODE (EDA)?

1. Login to the Minnesota ServicePoint site.
2. Before searching for a client or entering client information, select the correct provider to **Enter Data As.**
3. Click on **Enter Data As**. This option is located in the top right corner of the screen.

4. Select the provider where the client is being served by clicking on the **green circle with a plus sign** next to it.



Provider Search Results

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Provider	Level	Phone	Location	Last Updated
ICA-ES-HCC-DHS-OEO ESP-Training Provider (1410)	Level 2	651-647-4600	Saint Paul, MN 55108	06/10/2018
ICA-ES-HCC-DHS-OEO HYA-Training Provider (3410)	Level 3	651-647-4600	Saint Paul, MN 55104	01/03/2018
ICA-PH S-DHS-HS-Training Provider (4741)	Level 3	Unknown	Unknown	05/25/2018
ICA-PSH D-HCC-HUD-CoC-Training Provider (1413)	Level 2	Unknown	Saint Paul, MN 55108	11/29/2018

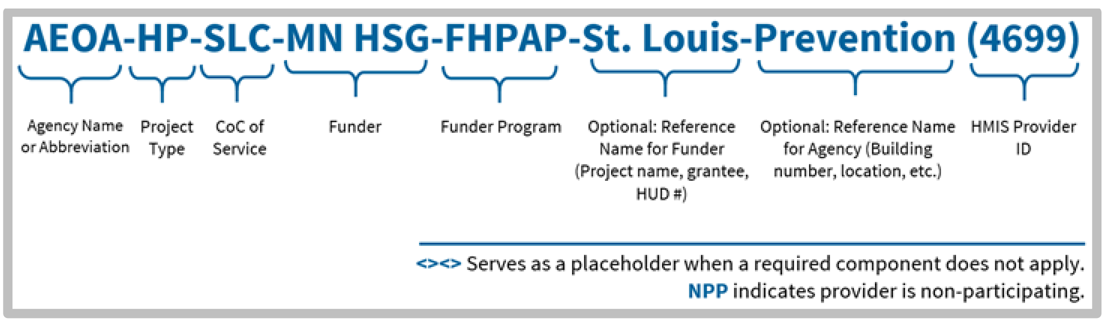
Showing 1-4 of 4

Note: Please email the MN HMIS Helpdesk if there is an EDA provider that you feel you should be able to access, but you do not see it in the list available to you.

DECONSTRUCTING A PROVIDER NAME

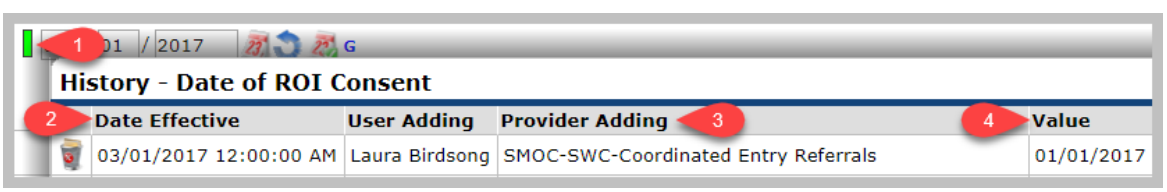
The providers in Minnesota's HMIS follow a naming convention. We've created a diagram to help you understand what each part of the provider name represents.

Project Provider Naming Convention



HISTORY BAR

What is the History Bar?

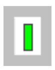


1. **History Bar**
2. **Date Effective**: Indicates that information was true as of this date
3. **Provider Adding**: The provider that a user was in EDA to when information was entered
4. **Value:** Answers that were selected on the Date Effective

What is the History Bar used for?

- Used to track historical answers for data elements.
- Historical answers should only be removed if an answer was never true for the client.
- If you have errors in reports and it seems that it's filled in correctly, the history bar is a great place to double-check your work.
  - When entering into a specific project provider, you should be in proper EDA mode; the Provider Adding, therefore, should NOT be a No Data Entry provider. The answer should be tied to the specific project.

What do the different colors of the History Bar mean?

 Information is effective as of 0-6 months ago

 Information is effective as of 6-12 months ago

 Information is effective as of over a year ago

ADDITIONAL RESOURCES

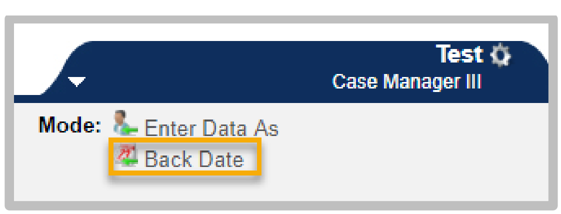
- **Knowledgebase Articles**
  - Forgetting to Use Enter Data As Mode (EDA): https://hmismn.helpscoutdocs.com/article/794-forgetting-to-use-enter-data-as-mode-eda
  - Changing a Provider Entry Type (if the wrong Provider or Entry Type was selected): https://hmismn.helpscoutdocs.com/article/792-changing-a-provider-entry-type

BACK DATE MODE

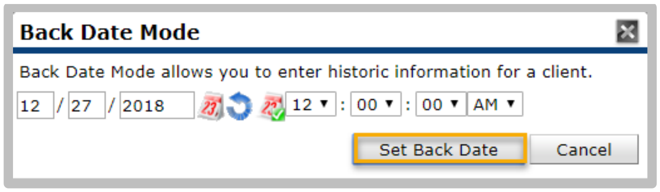
Back Date mode sets your system date to a date in the past. Back Date mode is one way to set the effective date of the data you are entering. An effective date of the data allows us to take the same data element and document changes over time.

HOW TO ENTER BACK DATE MODE

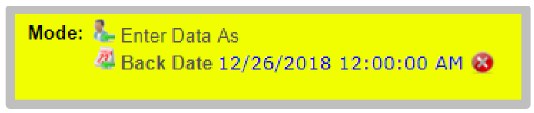
1. In the upper right-hand corner of your screen, you will see the **Back Date** option. Click it to backdate.



2. In the pop-up, select the appropriate date to which you want to Back Date to and click **Set Back Date.**



3. To confirm you are in Back Date Mode, make sure the top bar of your screen is yellow and Back Date reads the correct date. Proceed with data entry.

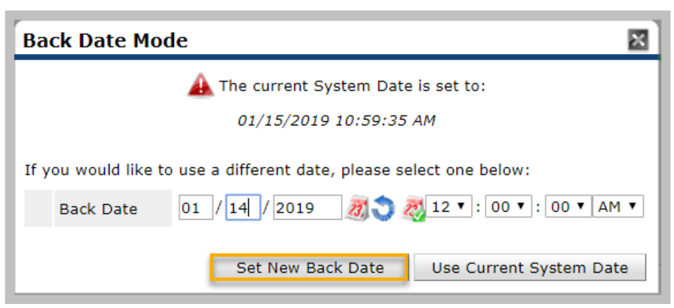


GENERAL DATA ENTRY

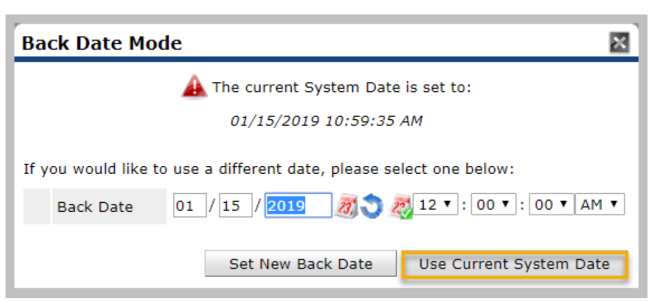
This section provides simplified instructions for common data entry tasks.

ADDING AN ENTRY RECORD

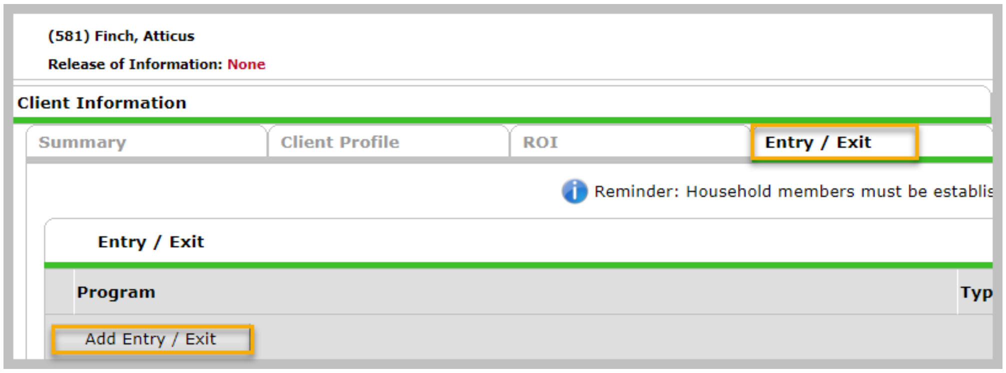
1. Enter EDA mode as the correct provider and open the client's record in ClientPoint.
   a. If entering data for a household, search for the head of household.
2. When prompted, enter the date of the client's entry into the project and select Set New Back Date.

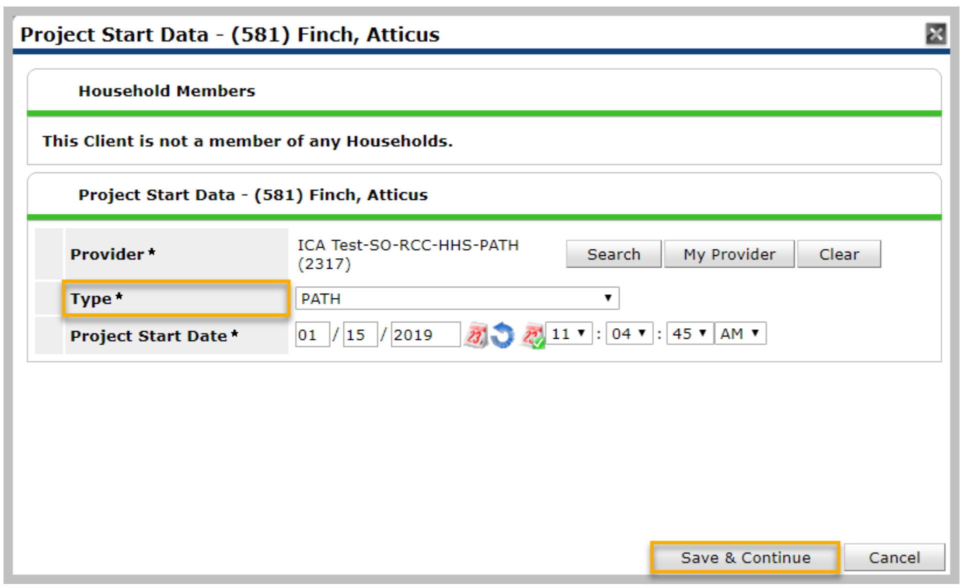


   a. If the client entered the project today, you can select Current System Date. (The date can be changed by clicking on Back Date in the top-right corner of the screen)



3. Click on the **Entry/Exit tab** and select **Add Entry/Exit**. Select the correct **Entry Type** from the Type drop-down menu (See Funder-Specific User Guides for guidance on which Entry Type to choose). Press **Save & Continue**.
    a. If entering a household, check the box next to each client included in the entry.





Note: Images are examples of data entry. Be sure to fill out prompts according to your specific workflow for a project.

4. For each client included in the entry, complete the data elements on the **Entry Assessment** in the Entry/Exit Data pop-up.
    a. If entering data for multiple household members, save time by clicking on Add Household Data and completing the Household Data Sharing Assessment.

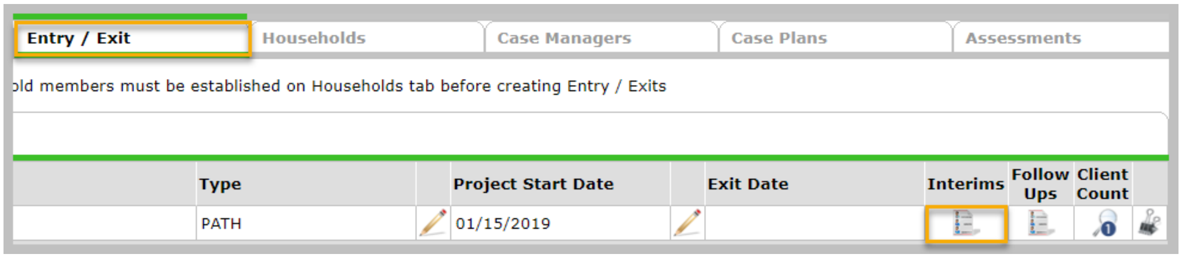
5. **Save & Exit**.

COMPLETING AN INTERIM REVIEW OR UPDATE

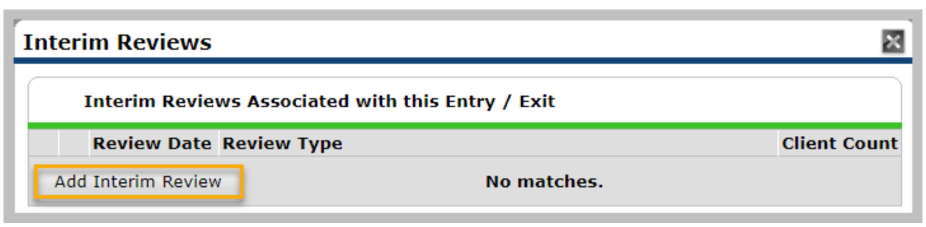
To keep your data up-to-date, we recommend updating data when a change or move occurs. However, you must update the data based on your program/funder's requirements.

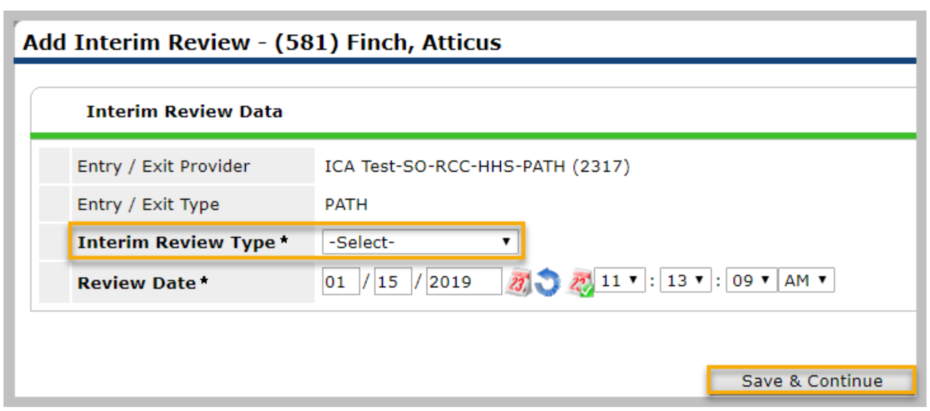
Some require 6-month updates to the data, others annual updates. If your project receives State or Federal funding, see the Funder-Specific User Guides for update requirements.

1. Enter EDA mode as the correct provider and open the client's record in ClientPoint.
2. Click on the Entry/Exit tab, then select the Interims icon for the correct Entry/Exit.



3. In the Interim Reviews pop-up, click on Add Interim Review.
    a. For updates required every 6 months after entry, select **6 Month Review** for **Interim Review Type**.
    b. For updates prompted by a client move or another change, select **Update** for **Interim Review Type**. For updates required by your program, see your Funder-Specific User Guides for update requirements which will include which Interim Review Type to use.
    c. If serving a household, be sure to include all applicable household members in the entry by checking the boxes next to their names.

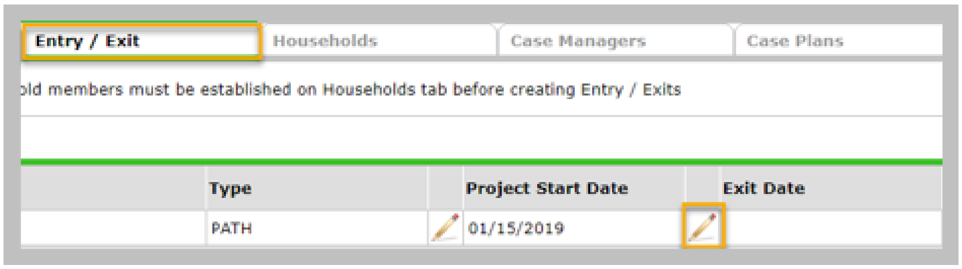


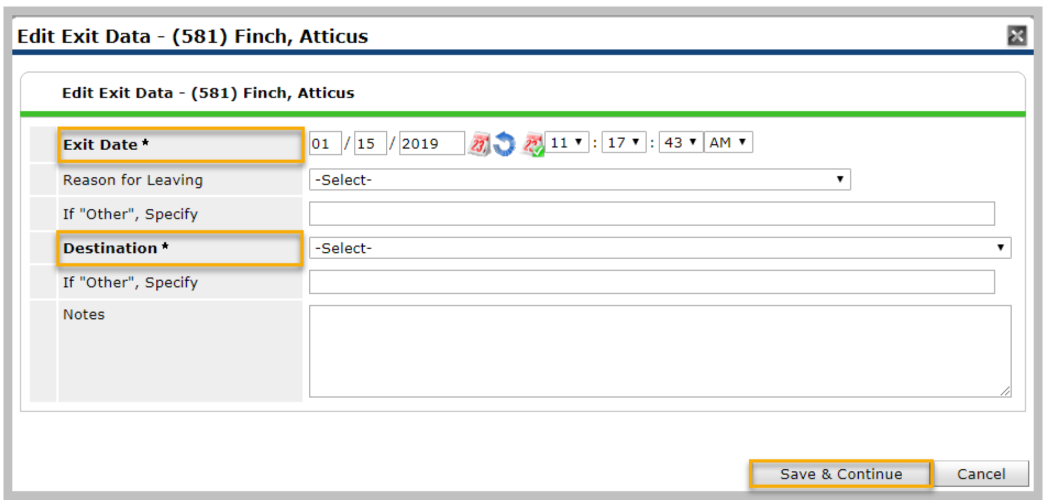


4. If needed, update the Interim Assessment for the specific funder with any updates.
5. **Save & Exit**

EXIT A CLIENT

1. Enter EDA mode as the correct provider and open the client's record in ClientPoint.
2. Click on the Entry/Exit tab, then select the edit pencil (in the Exit Date column) next to the correct entry.
    a. If exiting a household, be sure to include all applicable household members in the exit by checking the boxes next to their names.
3. Enter the correct Exit Date and Destination, then click on Save & Continue:





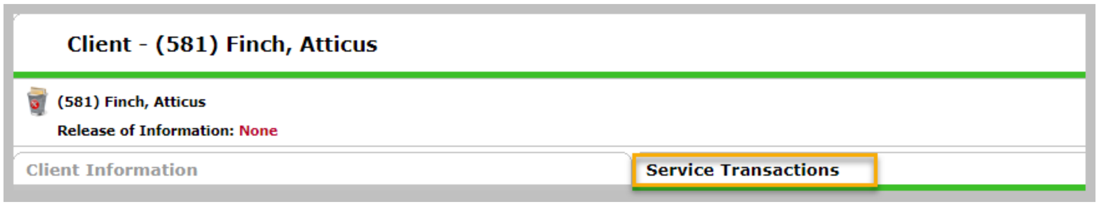
4. Complete the **Exit Assessment** for each household member.
5. **Save & Exit**

SERVICE TRANSACTIONS

Service Transactions are not part of every workflow. See your Funder-Specific User Guides for more information on whether Service Transactions are required for your data entry.

- Use the **Service Transactions** section of *ServicePoint/HMIS* to enter a client need or diagnosis, enter a service rendered, and refer clients to other providers who can meet their needs. Entering service transactions is divided into two steps: identifying a need and adding a service.

- This area of ServicePoint is located by clicking the ClientPoint tab, searching for, or adding, a client, then clicking the Service Transactions tab.



When are Service Transactions used?

- Some funders require the use of Service Transactions as part of their workflow.
- Each Coordinated Entry workflow consists of using the Service Transactions tab in some capacity. (See **Coordinated Entry Information** in the **Other Resources** section for more information).

ADDITIONAL RESOURCES

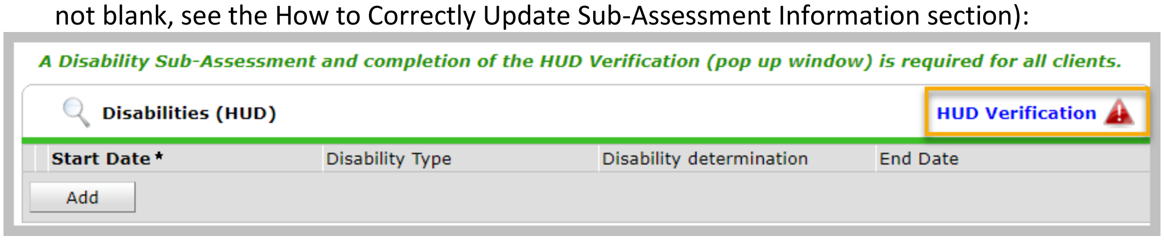
- **Knowledgebase Articles**
  - Funder-Specific Questions/User Guides: https://hmismn.helpscoutdocs.com/article/830-funder-specific-questions-user-guides
  - I accidently created an Entry in the wrong provider: https://hmismn.helpscoutdocs.com/article/805-i-accidently-created-an-entry-in-the-wrong-provider

COMPLETING SUB-ASSESSMENT INFORMATION

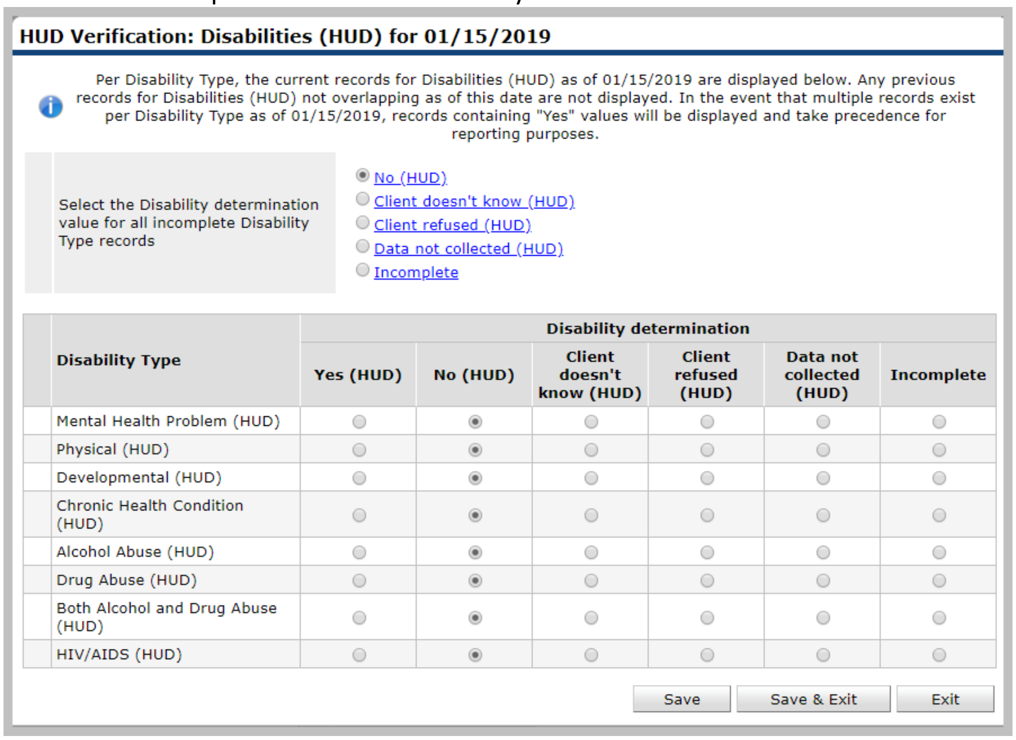
You will see Sub-assessments for Health Insurance, Monthly Income, Non-Cash Income, and Disabilities within a client's Entry Assessment. These must be completed, even if "No" is the answer to all the options. Directions below are specific to those entering sub-assessment information for the first time for a client. **Not all sub-assessments are required for all programs. You only need to answer these if they appear on your program's Entry Assessment.**

HOW TO COMPLETE SUB-ASSESSMENT INFORMATION (FOR THE FIRST TIME FOR THE CLIENT)

1. When you come upon a sub-assessment, if it is blank, click HUD Verification to complete (if it is not blank, see the How to Correctly Update Sub-Assessment Information section):



a. Use the response buttons to correctly answer whether the client receives each type.



HUD Verification: Disabilities (HUD) for 01/15/2019

Per Disability Type, the current records for Disabilities (HUD) as of 01/15/2019 are displayed below. Any previous records for Disabilities (HUD) not overlapping as of this date are not displayed. In the event that multiple records exist per Disability Type as of 01/15/2019, records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Disability determination value for all incomplete Disability Type records

- ◉ No (HUD)
- ○ Client doesn't know (HUD)
- ○ Client refused (HUD)
- ○ Data not collected (HUD)
- ○ Incomplete

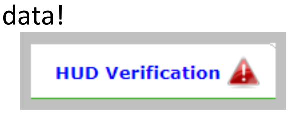
Disability Type	Disability determination					
	Yes (HUD)	No (HUD)	Client doesn't know (HUD)	Client refused (HUD)	Data not collected (HUD)	Incomplete
Mental Health Problem (HUD)	○	◉	○	○	○	○
Physical (HUD)	○	◉	○	○	○	○
Developmental (HUD)	○	◉	○	○	○	○
Chronic Health Condition (HUD)	○	◉	○	○	○	○
Alcohol Abuse (HUD)	○	◉	○	○	○	○
Drug Abuse (HUD)	○	◉	○	○	○	○
Both Alcohol and Drug Abuse (HUD)	○	◉	○	○	○	○
HIV/AIDS (HUD)	○	◉	○	○	○	○

Save | Save & Exit | Exit

b. Click **Save & Exit**

2. To confirm that sub-assessments data is complete, verify that the sub-assessment has a green checkmark next to HUD Verification.

a. If there is a red triangle, the sub-assessment is NOT complete, and you'll need to go back in and correct the data!

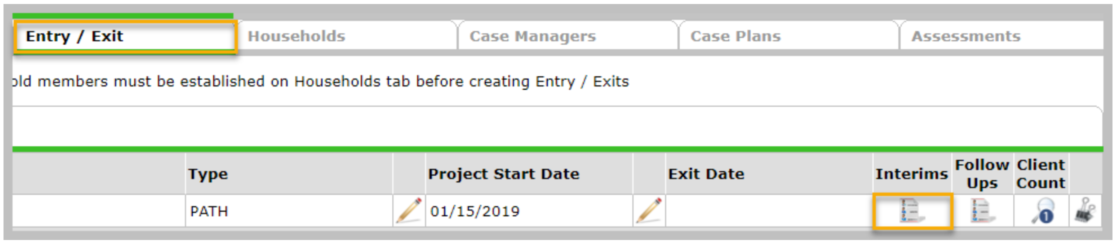


UPDATING SUB-ASSESSMENT INFORMATION

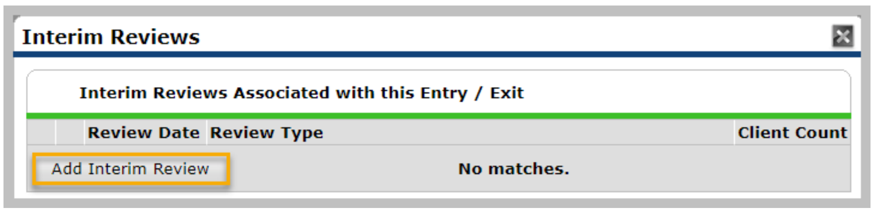
HOW TO CORRECTLY UPDATE SUB-ASSESSMENT INFORMATION

When information is no longer true, you can add an end date to the line item of the sub-assessment and a new sub-assessment line should be added. In the steps below, we are demonstrating how to update sub-assessment information while a client is enrolled in your program. Some of these steps will also apply, however, if there is existing data in a client's sub-assessment at entry into your project, and you need to document changes; start at Step 7.

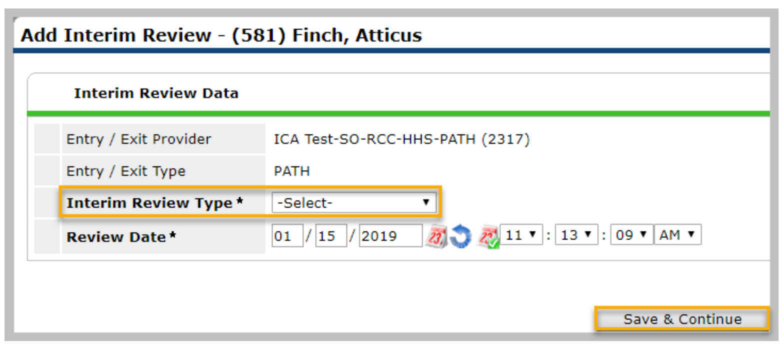
1. EDA to the appropriate provider.
2. Enter into the client's record.
3. In the **Entry/Exit tab**, click on the icon in the **Interims** column for the entry you'll be updating.



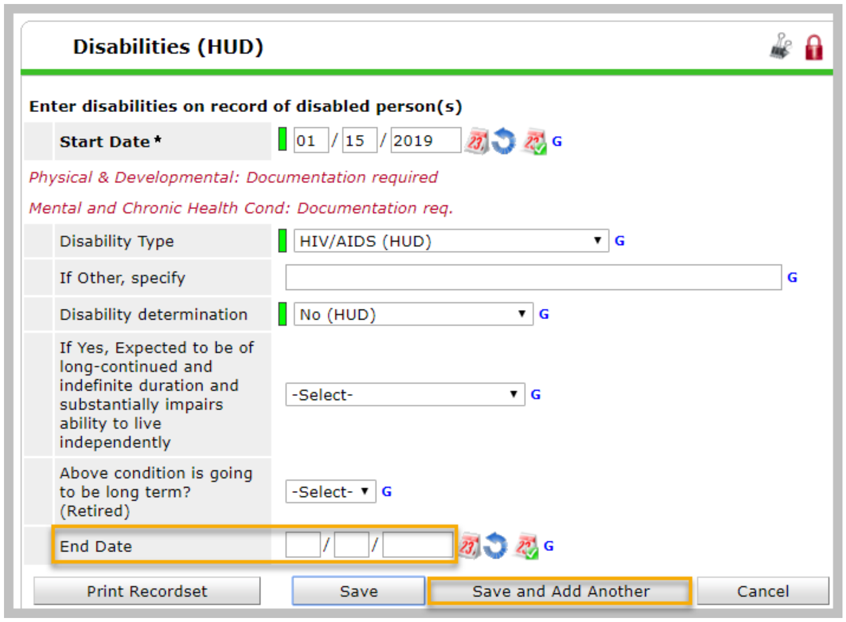
4. In the popup, select **Add Interim Review**.
   a. Click to include household members, as needed.



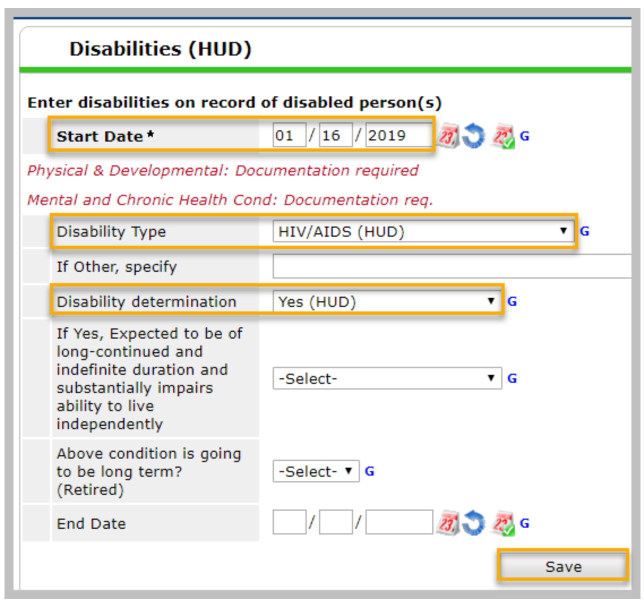
5. Select the appropriate **Review Type** (Update, Annual Assessment, 6 month…) and enter a Review Date. Click **Save & Continue**.



6. Scroll down to the sub-assessments section.
7. Update sub-assessment Yes/No question, as needed, if response has changed for client.
8. Use the HUD Verification icon to update sub-assessment information for all sources.
   a. Click the Edit Pencil next to the information that is no longer correct
   b. Add an End Date to the line item. Press Save and Add Another.



c. Add updated information and make sure the Start Date is the day after the previous record's End Date. Click Save.



9. **Save & Exit**.

Note: If you have questions about updating sub-assessment information, we recommend watching the Updating HUD Sub-Assessments video for more information. If you continue to have questions, please contact the Helpdesk.

WHEN THE INFORMATION YOU HAVE IS DIFFERENT THAN THE INFORMATION ANOTHER AGENCY ENTERED

- If a client is being served by 2 agencies at the same time, and the information given to you by the client is not the same as what was given to the other agency, we recommend working between the two agencies to find the most accurate information and then only keep the correct information.
- The end goal is to have good data in client records which help with Coordinated Entry and ultimately with helping clients get and stay housed. Being a good neighbor and working together when there are discrepancies or errors help our clients move through their housing crisis and into stable housing more quickly.

ADDITIONAL RESOURCES

- **Updating HUD Sub-Assessments:** https://vimeo.com/217745148

CREATING A HOUSEHOLD

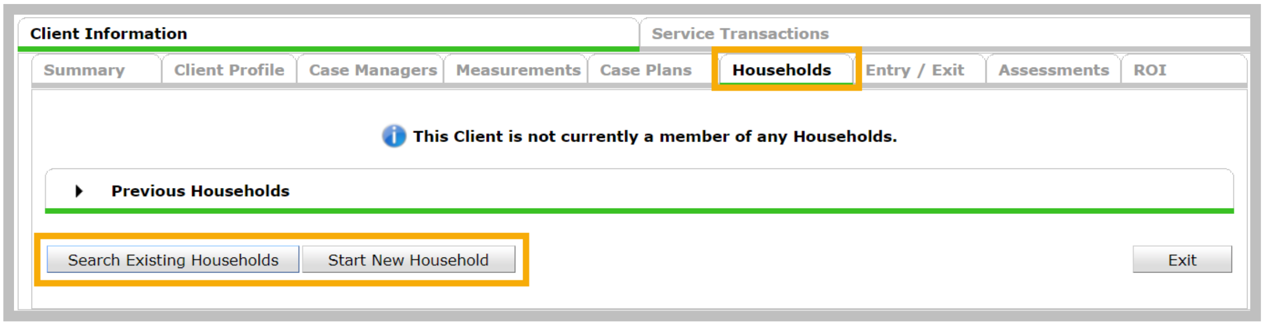
BEFORE YOU CREATE A HOUSEHOLD

- Creating a household gives the user the ability to create an Entry/Exit record including all household members and assign services to a group of people.
- Households are created with one person designated as the *Head of Household*. When other members are added to the household, they are identified by their relationship to the Head of Household.
- *Households are not created for single clients.*

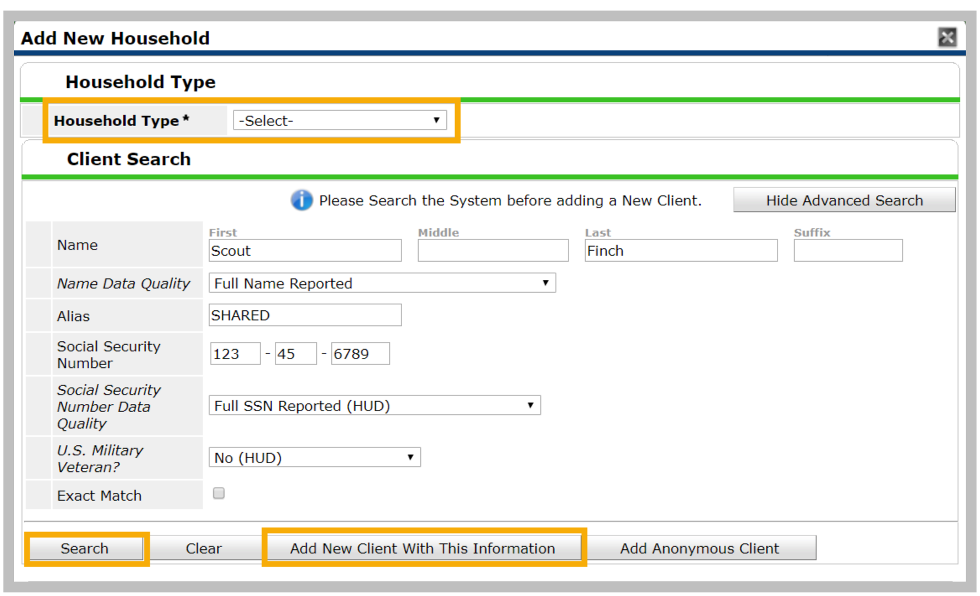
YES	Yes – Create a New Household: o If you receive a Coordinated Entry referral for a family vacancy at your program, and are only referred the Head of Household from the Priority List, you may need to create the rest of the household at intake. (Depends on your CoC's procedures.) o Create a new household if the Head of Household or Household Type changes **in-between** project enrollments. o If the Head of Household changes during enrollment, you will want email the Helpdesk for guidance, as this is a complex process which will likely involve creating a new household.
NO	No – Do Not Create a New Household: o If there is a household that matches the current configuration of the household presenting for services already created in HMIS, use that existing household. o If the Household Type changes but the Head of Household stays the same, add the new client(s) to the current household and change the type in the Household tab accordingly. o If the Household Type changes in a household that is **currently being served** by your project, do not create a new household.

HOW TO CREATE A HOUSEHOLD

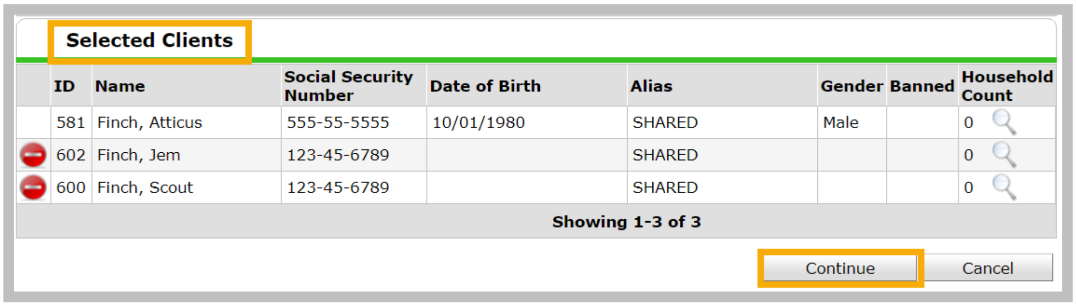
1. Enter **EDA** (Enter Data As) mode, and **Back Date** to the date you first started working with the household.
2. **Search** for the client who will be the Head of Household on the Client Search screen to either identify an existing client or to add a NEW client to the system.
3. While in the **Head of Household's record**, navigate to the **Households Tab**.
4. Click on Search Existing Households first, and if you don't find an existing household, click on **Start New Household**.



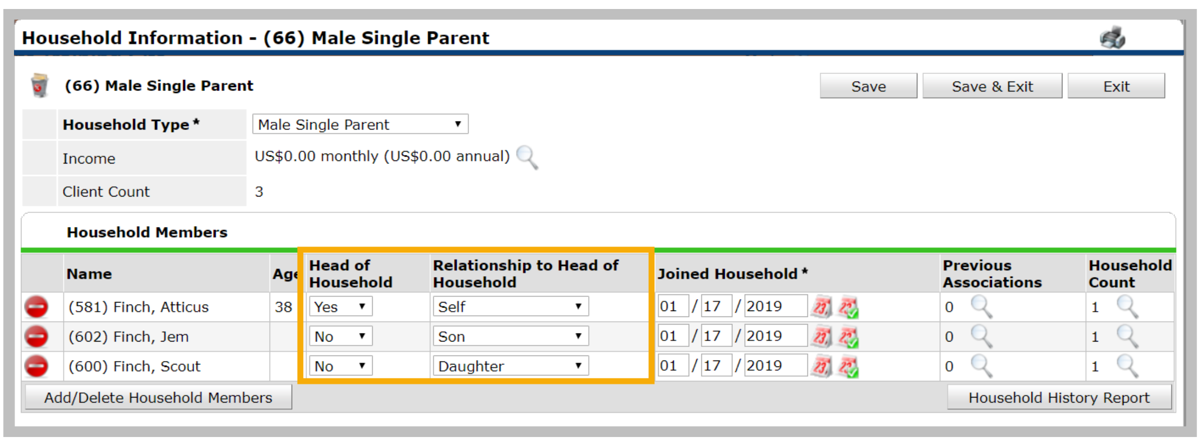
5. On the **Add a New Household** pop-up, select the correct **Household Type** from the drop-down menu.
6. Fill out the name of a household member that you would like to add to the household.
   a. Click **Search** to determine if the household member has previously been entered into the system. (Note that "Add New Client with This Information" is grayed out, as the system requires that you must search at least once for a client to ensure a duplicate client is not created in the system.)
7. After the Search button has been clicked, the results will show in Client Results.
   a. If you find an existing shared record for the client, use that!
   b. If there are no matches, click **Add New Client With This Information**:



8. A pop-up box will appear as a flag to verify a **New Client** is being added to the system. Click **Ok**.
9. The new household member's name will then appear in the Selected Clients section below.
    a. If there are additional household members to add to the household, repeat the steps above to keep adding more household members until finished.
    b. Click **Continue** once all household members have been added.

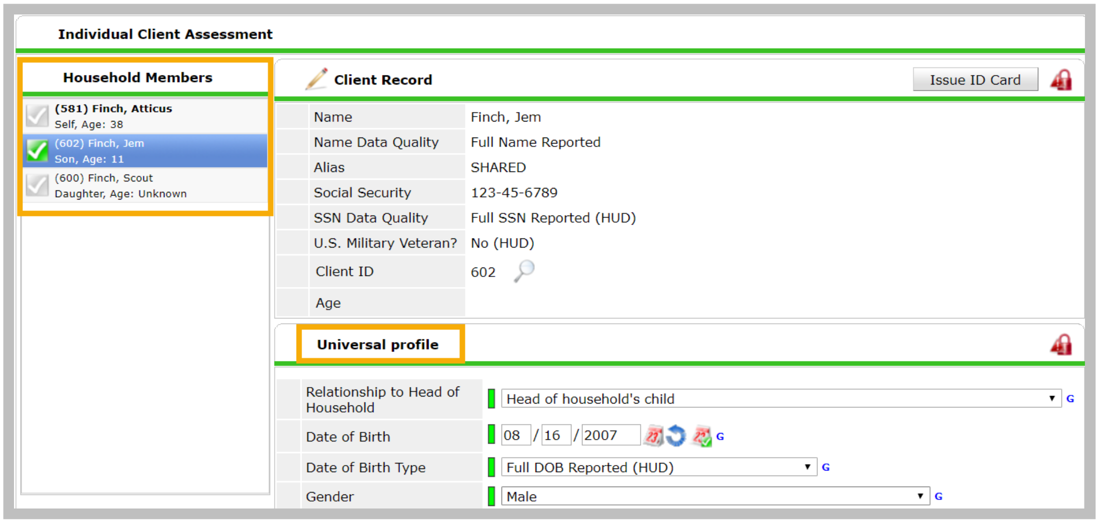


10. The **Household Information** pop-up allows you to create the household associations and to complete required data elements for **all** household members in one location.
    a. Under the **Head of Household column**, select **Yes** for the Head of Household and **No** for all other household members.
    b. Fill out the **Relationship to Head of Household** column for all members as well.
        i. The Relationship to Head of Household field should always be marked as "Self" for the client who is the Head of Household.

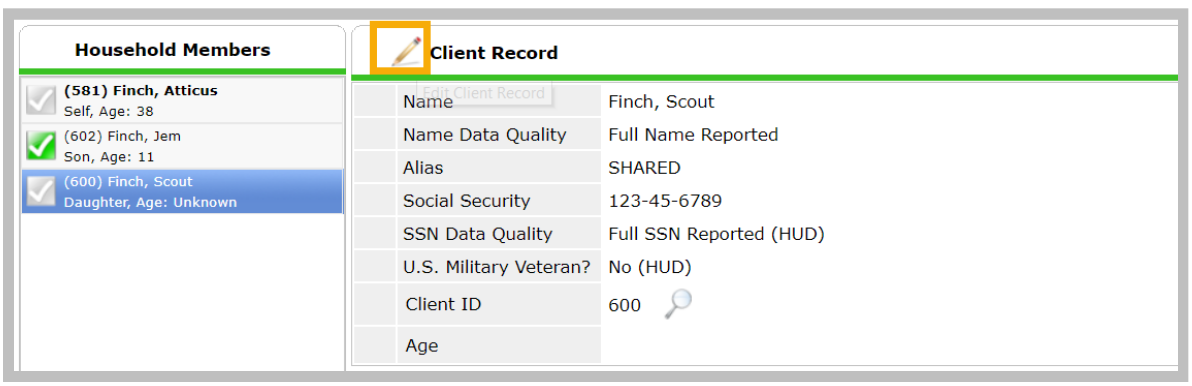


11. Scroll down to the **Universal Profile** assessment (attached to the Household Information Tab), and confirm all information is entered completely for the Head of Household.

12. On the left side of the screen, toggle to the additional household member names and **complete** the **Universal Profile** assessments by answering all questions for each household member.



13. Update each household member's **Client Record** questions if necessary.
    a. On the Client Profile Tab, click on the **edit pencil** to the left of **Client Record.**
    b. Update the data elements, as needed.
    c. Repeat for all household members as needed!



14. Click **Save & Exit** when completed.

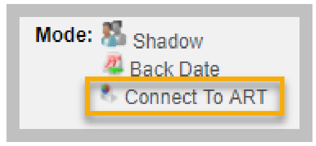
ADDITIONAL RESOURCES

- **Household How-To Guide:** https://hmismn.org/s/Households-How-To-Guide.pdf
- **Updating Households (Data Entry):** https://hmismn.org/?vimeography_gallery=29&vimeography_video=219130901

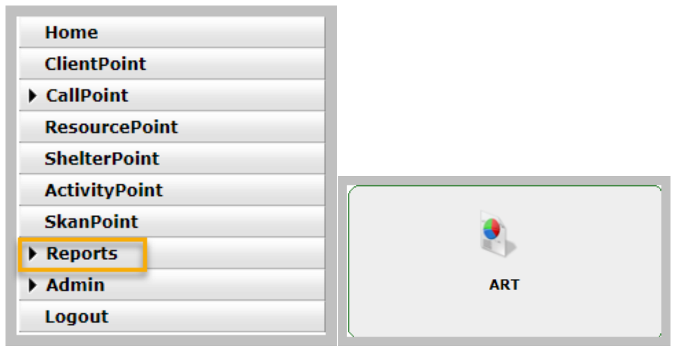
SCHEDULING REPORTS IN ART

Scheduling a report runs the report "behind the scenes", allowing you to complete other data entry while you wait. Once complete, a file is automatically saved to your ART Inbox and will remain there until you delete the file. Helpdesk has access to your ART Inbox and can quickly access a report you ran for any troubleshooting assistance.

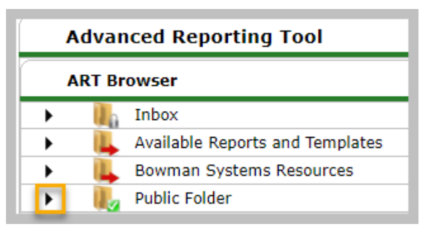
1. Log into ServicePoint and connect to ART (using one of the two options below):
    a. Click on **Connect to ART** just below the Back Date function in the top right-hand corner of the screen:



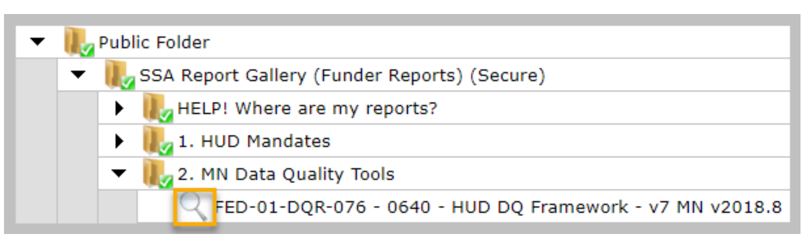
    b. Click on the **Reports** module and click on ART:



2. Select the Report to schedule:
    a. Click on the arrow in front of “Public Folders.” Additional folders will appear.



    b. Click on the folder’s name to display the available reports on the right-hand window. If nothing displays, click on the arrow one more time to reveal additional folders. Most funding sources have sub-folders, with the data check and counting reports separated.
    c. Click the **magnifying glass** to the left of the report you wish to run. Example shown below.



    d. Click **Schedule Report.**

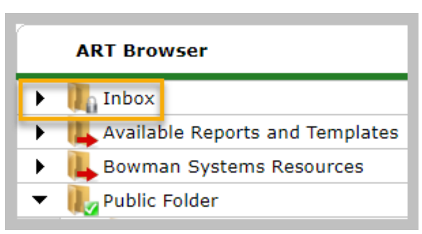
3. Respond to report prompts in pop-up.
    a. The prompts are the same if you view, edit or schedule a report, although they may appear in a different order with a different entry format.
    b. Not all prompt instructions listed in the table apply to each report. Review those that apply to your report.

EDA Provider	Leave as Default Provider except in rare cases. Contact the Helpdesk if you have any questions
Start Date	The first day of the report period if PM, change to AM
End Date +1	The last day of the report period +1 Day For example: if the last day of your report period is 12/31/2015, you will enter 1/1/2016 as the end date if PM, change to AM
Enter Effective Date	The last date of the report period + 1 Day if PM. change to AM
Provider	Click on **Provider** in the prompt section Click on the **Select** button that appears below

4. Respond to schedule report prompts in the pop-up to indicate HOW you want the report to send.

Name	You can change the name of the report file (you may leave as is)
Report Format	Select PDF or Excel
Users Inbox	Your Name (leave as is)
Interval	In most instances, you will want to select “Once.” However, if there is a report you like to run frequently, you can schedule the report to run automatically on a daily, weekly, or monthly basis. If you want the report to run in an interval other than “Once,” be sure to change the start date and end date prompts to set a recurrence pattern for ART to automatically generate a report.
Start/End Date	In most instances, you will leave as current date and time (this is when you want the report to run). However, if you selected an option other than “Once” for the interval prompt, be sure to change the start date and end date prompts to set a recurrence pattern for ART to automatically generate a report.

5. Click Send once all your schedule report prompts are entered.
6. Once report is ready, it will appear in your ART Inbox.



7. Download the report.
    a. Once your report appears in your ART Inbox, click the magnifying glass icon next to the report and select "download" to download to your computer.
    b. Depending on what browser you are using, you may see a new pop-up that asks if you want to open or save the file.
    c. The report will stay in your ART inbox until you delete the report form your ART Inbox. You may download the report multiple times as long as it is housed in your inbox.
    d. To delete the report, click on the magnifying glass and select "Delete".

SOME THINGS TO KEEP IN MIND

- The report may take a while to load!
- To navigate to your ART inbox, click on the arrow alongside the "Inbox" folder on the main page of ART to reveal your scheduled reports.
- You can view the status of the report by checking the Scheduled Reports section at the bottom of the ART main page. Click Refresh button to view recently scheduled reports. The report will appear in your ART Inbox once the status changes from pending/running to "Complete".

ADDITIONAL RESOURCES

- **REPORTcollection:** https://airtable.com/shrhfbuT0jRIVvFhk/tbluQ4XghPeDSlTVd
    - A searchable index of 200+ ART reports. We have verified this shortlist among our entire ART collection of 2500+ reports. We documented the report name, audience, location, description, and a newly-created report code so you can filter and gauge more easily the type of reports we have available to our users.
- **Knowledgebase Articles:**
    - Funder-Specific Questions/User Guides: https://hmismn.helpscoutdocs.com/article/830-funder-specific-questions-user-guides
    - ART Refresh Schedule "Warehouse Build": https://hmismn.helpscoutdocs.com/article/823-art-refresh-schedule
    - Troubleshooting ART Reports: https://hmismn.helpscoutdocs.com/article/822-nothing-is-showing-up-on-my-report
    - Unable to Access ART: https://hmismn.helpscoutdocs.com/article/824-unable-to-access-art

OTHER RESOURCES

A variety of documents or videos that can be helpful resources for an HMIS user, in addition to the information found in these instructions.

- **ROI FAQs:** https://hmismn.org/s/ROI_FAQ.pdf
    - This document providers a closer look at the ROI and some frequently asked questions that come up.

- **Household How-To Guide:** https://hmismn.org/s/Households-How-To-Guide.pdf
  - This guide provides a deep-dive into Households and different scenarios you may encounter.
- **Funder-Specific User Guides:** https://hmismn.helpscoutdocs.com/article/830-funder-specific-questions-user-guides
  - These guides will assist users in understanding any funder-specific data entry requirements and reporting standards.
- **Coordinated Entry Information:** https://hmismn.org/coordinated-entry/
  - Coordinated Entry Information specific to a CoC.
- **Videos:** https://hmismn.org/videos/
  - Videos that address a wide variety of topics.
- **Helpdesk Knowledgebase Articles:** https://hmismn.helpscoutdocs.com/category/528-data-entry
  - These instructions address core workflow topics, but these articles dive a little deeper into these, and additional, topics.
- **REPORTcollection:** https://airtable.com/shrhfbuT0jRIVvFhk/tbluQ4XghPeDSlTVd
  - A searchable index of 200+ ART reports. We have verified this shortlist among our entire ART collection of 2500+ reports.