



HMMIS

◆ November 2006 User Meeting

PLEASE SIGN THE MEETING ROSTER

Meeting Agenda

- ◆ Review
- ◆ Holiday Gift Baskets
- ◆ Client Notes Tool
- ◆ MetSYS Program Updates
- ◆ HMIS Web Site Updates
- ◆ HMIS Committee
- ◆ HMIS User Survey
- ◆ Open Discussion



Review

◆ August 2006 Meeting

Review of May 2006 Meeting

- ◆ **Implementation Status**
 - APR Completed
- ◆ **MetSYS 5.0 Upgrade**
 - Installed
- ◆ **HMIS Universal Data Sheet**
 - In Use
- ◆ **Local HMIS Web Site**
 - HMIS Information
 - Class Registration



Accomplishments

Accomplishments

- ◆ HMIS APR Provided to HUD
- ◆ MetSYS Version 5.0 Installed
- ◆ MetSYS Version 5.0.117 Scheduled
- ◆ Continued Bed Management
- ◆ HMIS Web Site Complete
- ◆ Approx. 900 duplicate client records merged.



Holiday Gifts

Holiday Gifts

- ◆ Track clients receiving gift baskets
- ◆ Report on all clients that have received a gift basket or gift
- ◆ Help stop double dippers
- ◆ Service setup required
- ◆ Contact HMIS Administration for setup
- ◆ Real-time intake preferred
- ◆ Reporting on agency or community level

Holiday Gifts, Procedure

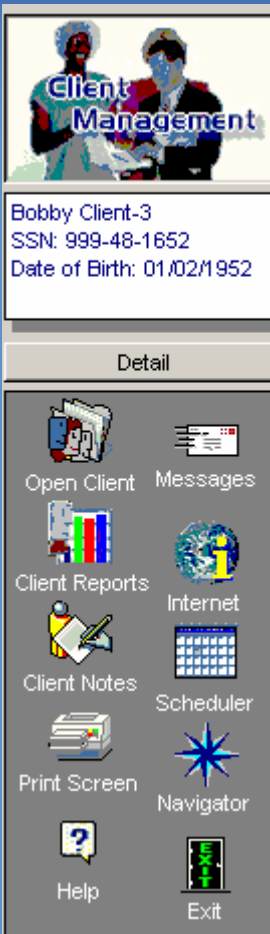
- ◆ Placement for each client receiving gift/basket. Three children, three placements
- ◆ Select Status from the detail screen
 - Scheduled – Registered
 - Delivered – Inactive Completed
 - Unavailable - Inactive, term. before completion
- ◆ Enter date registered into the Start Date field
 - Registers on Oct 24, 2006
- ◆ Enter date client receipt into the End Date.
 - Client receives the basket for Thanksgiving, enter the date of the holiday in the End Date Field 11/23/2006

Holiday Gifts

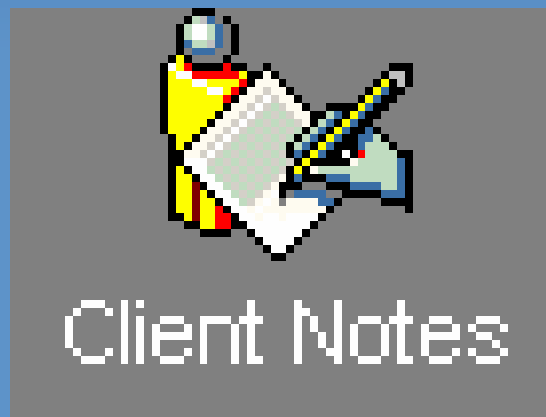
◆ Reporting

- Through the Program Management
- Select Crystal Reports Printouts
- Select Holiday/Gift Client List
 - Select Beginning Date
 - Select Ending Date
 - Select Report Type
 - Select RUN

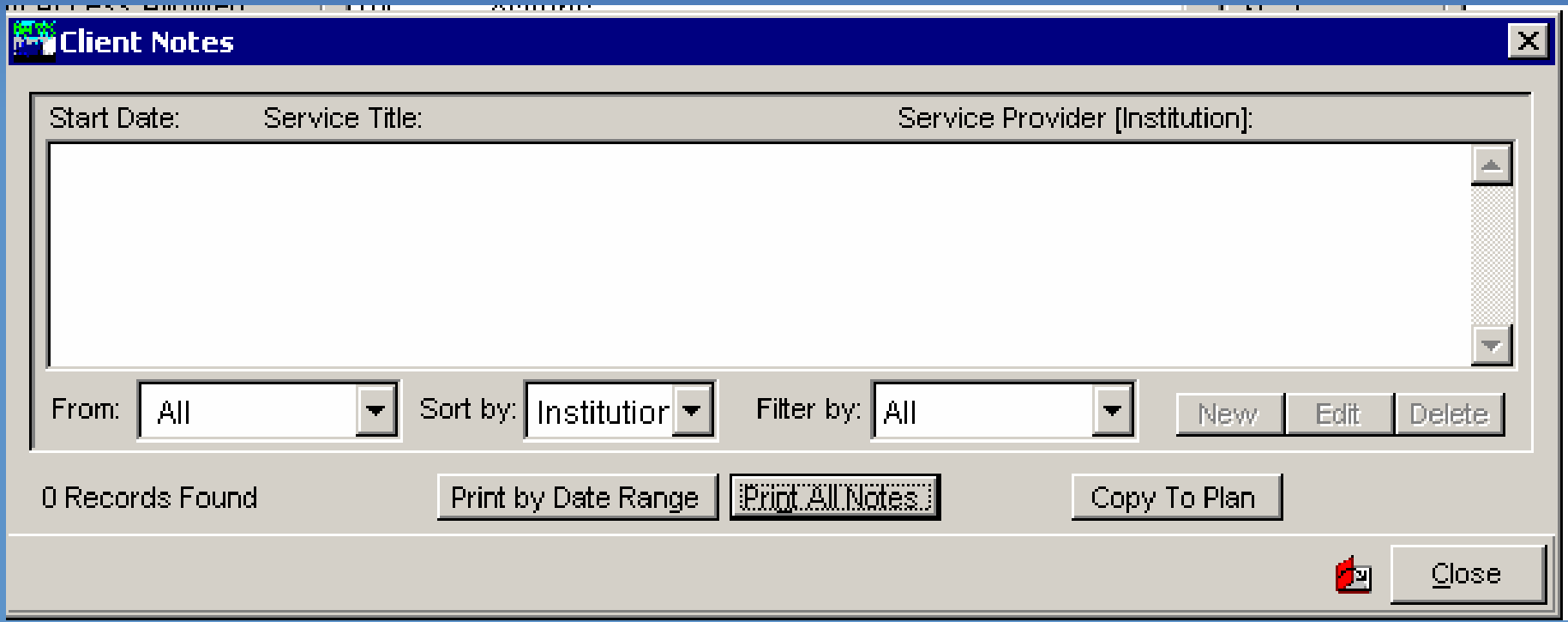
Client Notes



The image shows a screenshot of a software interface titled "Client Management". At the top, there is a header with the text "Client Management" and an image of two people. Below the header, the following information is displayed: "Bobby Client-3", "SSN: 999-48-1652", and "Date of Birth: 01/02/1952". A "Detail" button is visible below the information. At the bottom, there is a menu with several icons and labels: "Open Client", "Messages", "Client Reports", "Internet", "Client Notes", "Scheduler", "Print Screen", "Navigator", "Help", and "Exit".



Client Notes List



The screenshot shows a software window titled "Client Notes" with a close button (X) in the top right corner. The window contains a table with three columns: "Start Date:", "Service Title:", and "Service Provider [Institution]:". The table area is currently empty. Below the table, there are three dropdown menus: "From:" set to "All", "Sort by:" set to "Institution", and "Filter by:" set to "All". To the right of these dropdowns are three buttons: "New", "Edit", and "Delete". At the bottom left, it says "0 Records Found". In the center, there are two buttons: "Print by Date Range" and "Print All Notes". To the right of these is a "Copy To Plan" button. In the bottom right corner, there is a red icon and a "Close" button.

Action Detail Screen

The screenshot shows a software window titled "Action Detail" with a close button in the top right corner. The window is divided into two main sections: "Details" and "Cost".

Details Section:

- Action Type: No Action, Other (dropdown)
- Milestone Type: (dropdown)
- Sub-type: (dropdown)
- Description: Test note (text field)
- Staff: Chapman, Mike 211 (text field)
- Phone #: () - (text field)
- Date: 10/18/2006 (text field)
- Start Time: :: (text field)
- End Time: :: (text field)
- Cost: (text field)
- Status: No Entry/Unknown (dropdown)
- Provider: 211 Brevard, Inc (dropdown)

Cost Section:

- Private (checkbox)
- History (button)
- Local Record Only (checkbox)
- Note Type (group):
 - Case Note (radio)
 - I&R Contact (radio)
 - Milestone (radio)
 - Action (radio)
 - Letter (radio)
 - Memo (radio)
 - Phone Call (radio)
 - Meeting (radio)

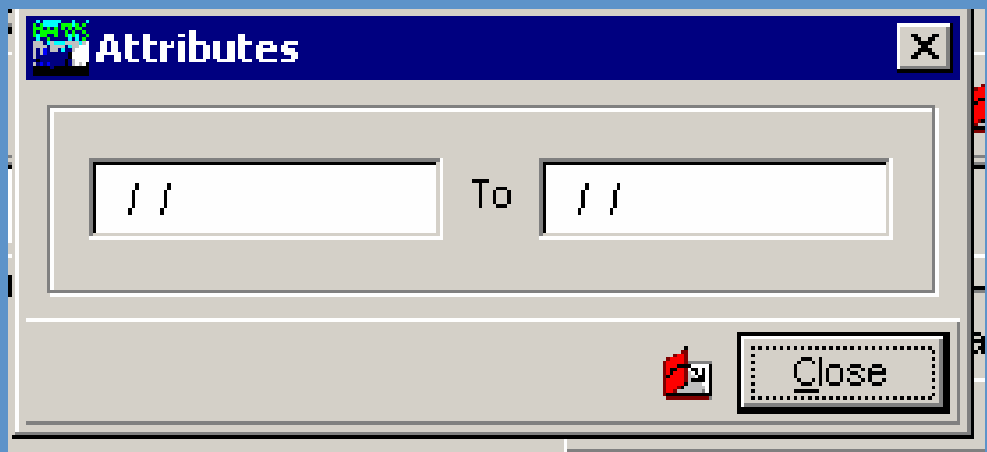
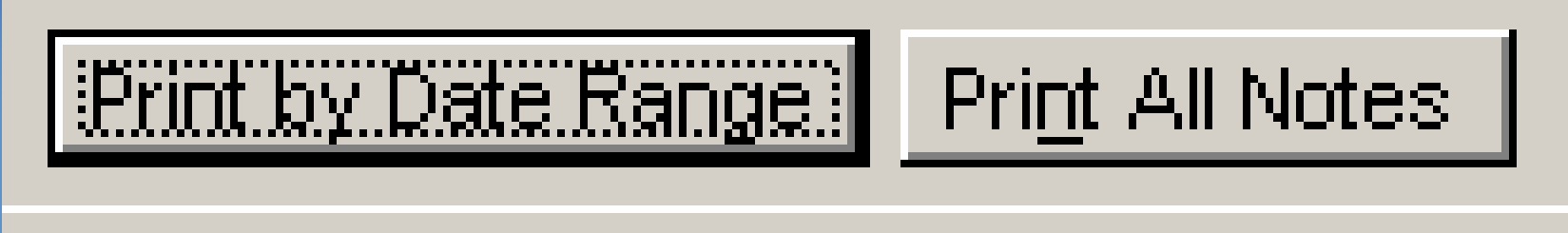
Note Text Area:

Note test here.

Spell Check (button)

Bottom Buttons:

Copy to Plan | Templates | Service Area | Custom Screen | Print | Cancel | Save



Note Tool Advantages

- ◆ Note is owned by agency
- ◆ Filter for agency notes
- ◆ Filter for note type
- ◆ Print notes for date range
- ◆ Also accessible through the History Tool.

MetSYS Program Updates

◆ MetSYS version 5.0.117 scheduled

- Thursday November 2, 2006, 4:00pt
- Family Group SSN field search fixed
- Pop-up message tool now functional
- Alert Tool, edit problem resolved
- Print feature can be accessed from Milestone screen
- Correct DOB search filter

◆ Notes Tool in the Detail Pane

HMIS Web Page

- ◆ New Design
- ◆ Easy to follow
- ◆ More information
- ◆ Register for HMIS training
- ◆ User Meetings, HMIS Committee and Director Meeting minutes
- ◆ Links to HMIS sites
- ◆ Download forms and other documents

HMIS Committee

- ◆ Previously scheduled meeting has been postponed.
- ◆ Rescheduled for November 16th
- ◆ Are you or do you know someone that would be interested in becoming a committee member?
 - Yes, fill out a HMIS Committee prospect sheet

User Survey

- ◆ **Anonymous**
- ◆ **Your Opinion**
- ◆ **Help Improve Our HMIS**
- ◆ **Identify Area's Needing Change**

Open Discussion



Open Discussion

- ◆ **Last Name field protocol for Mc, Mac, La, de**
 - No SPACE characters in the Last Name field.
 - Use “-” Hyphens in place of the Space character.
- ◆ **Marriage name change**
 - Change last name field to current married name.
 - Open Maiden Name field then enter maiden name.
- ◆ **SSN off by one digit? (5581 or 5518)**
 - Suggestions



Thank You All