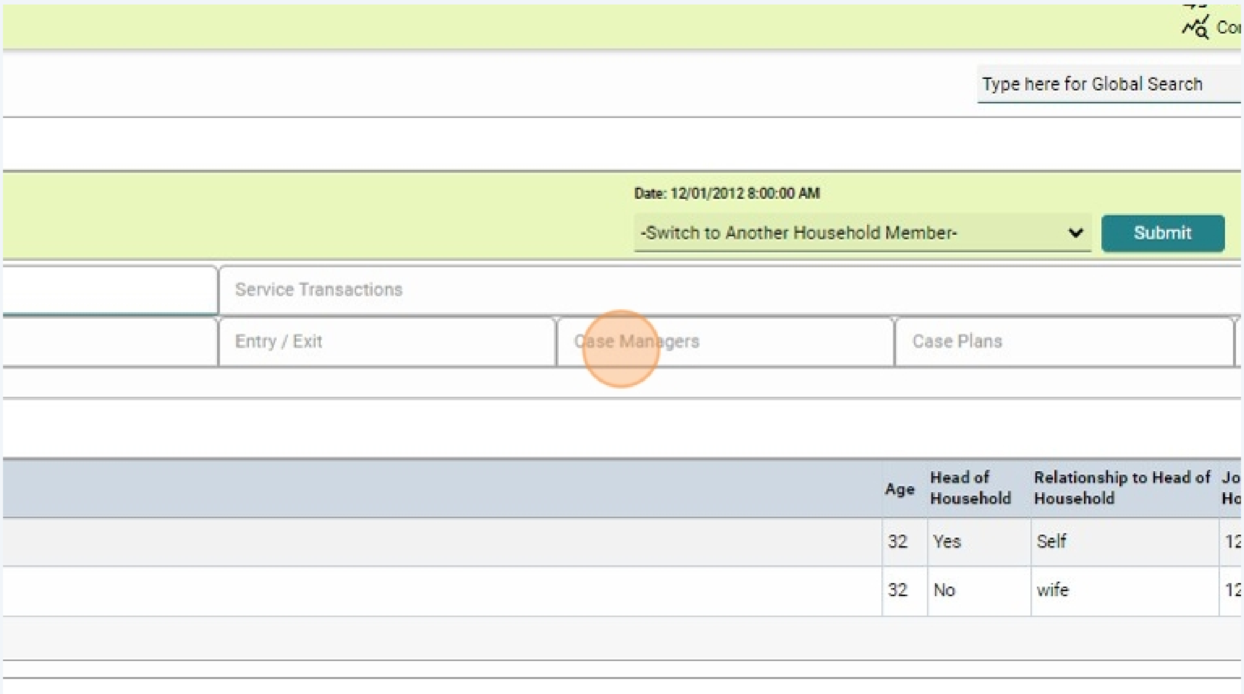
KYHMIS 103: Adding Case Manager, Case Notes, Services, and additional Clients to an existing Household

In this module, we will go over:
Case Manager
Case Plans
Adding a Service
Adding a Client to an existing Household

Case Manager

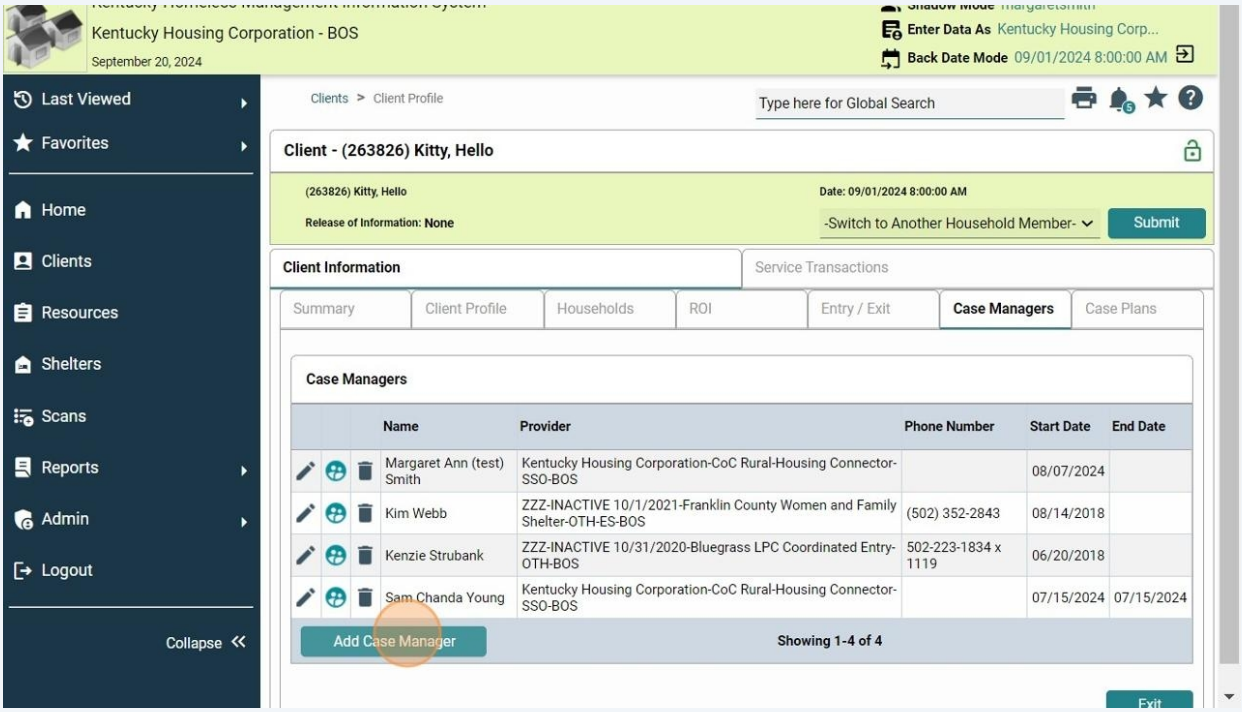
2

Moving along the tabs left to right, click the "Case Managers" tab within the Client Record.

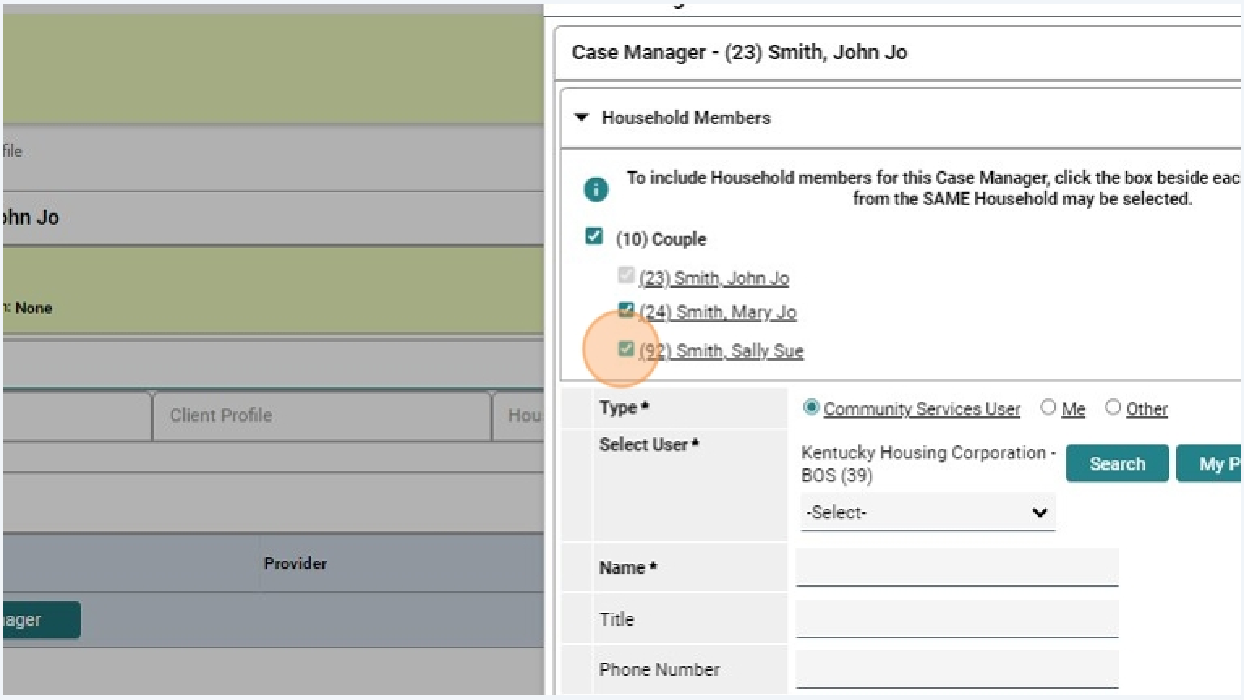


3

Click "Add Case Manager".



4 Select the appropriate household members.



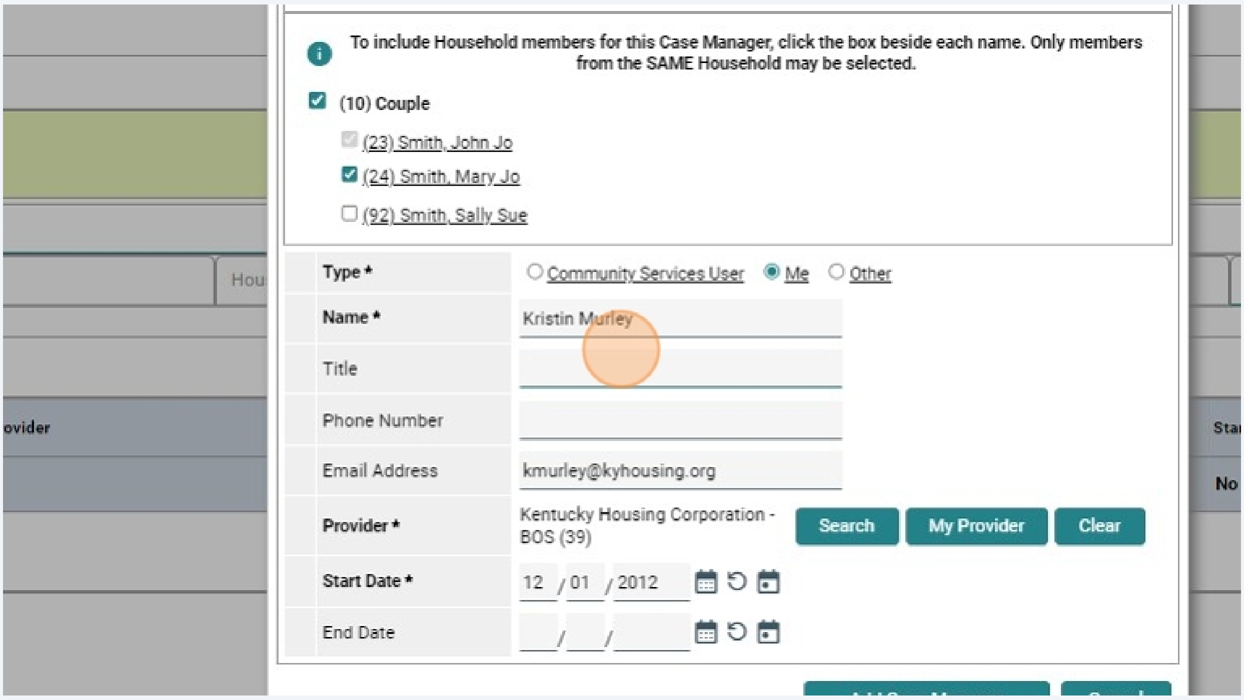
5

Select the Case Manager:

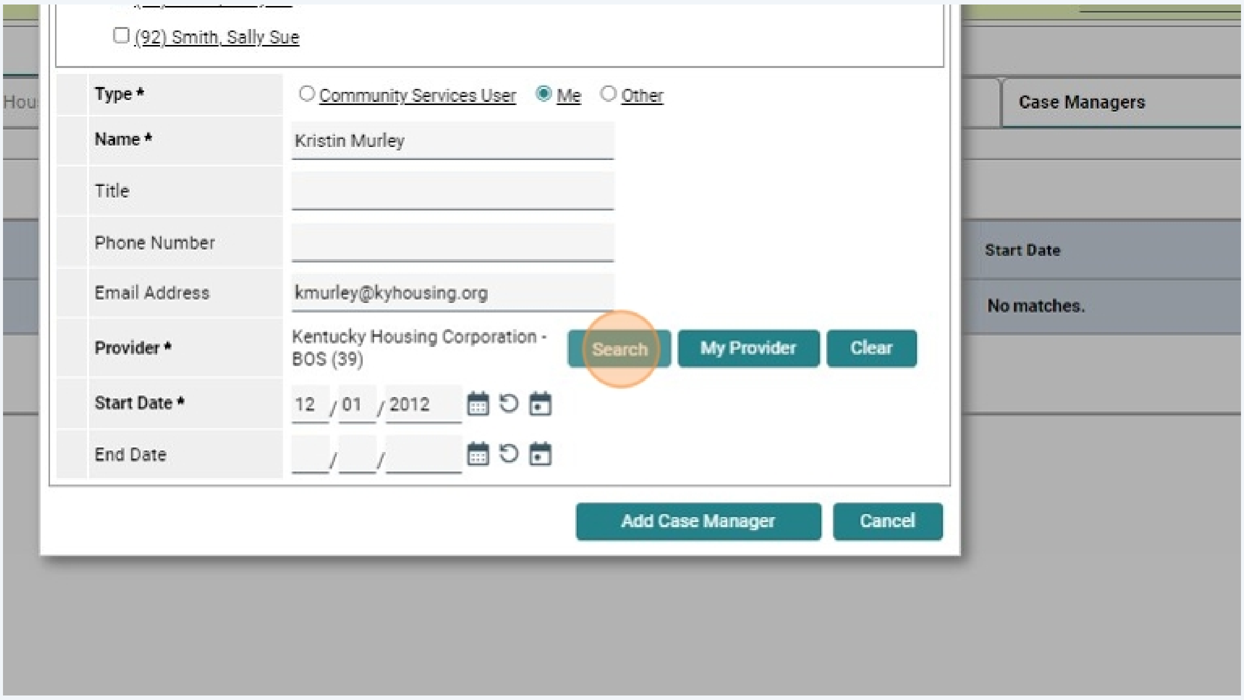
• **"Me"**- will default to you (the user entering the information)

• **"Community Services User"**- allows you to pick from a drop down of users for that provider

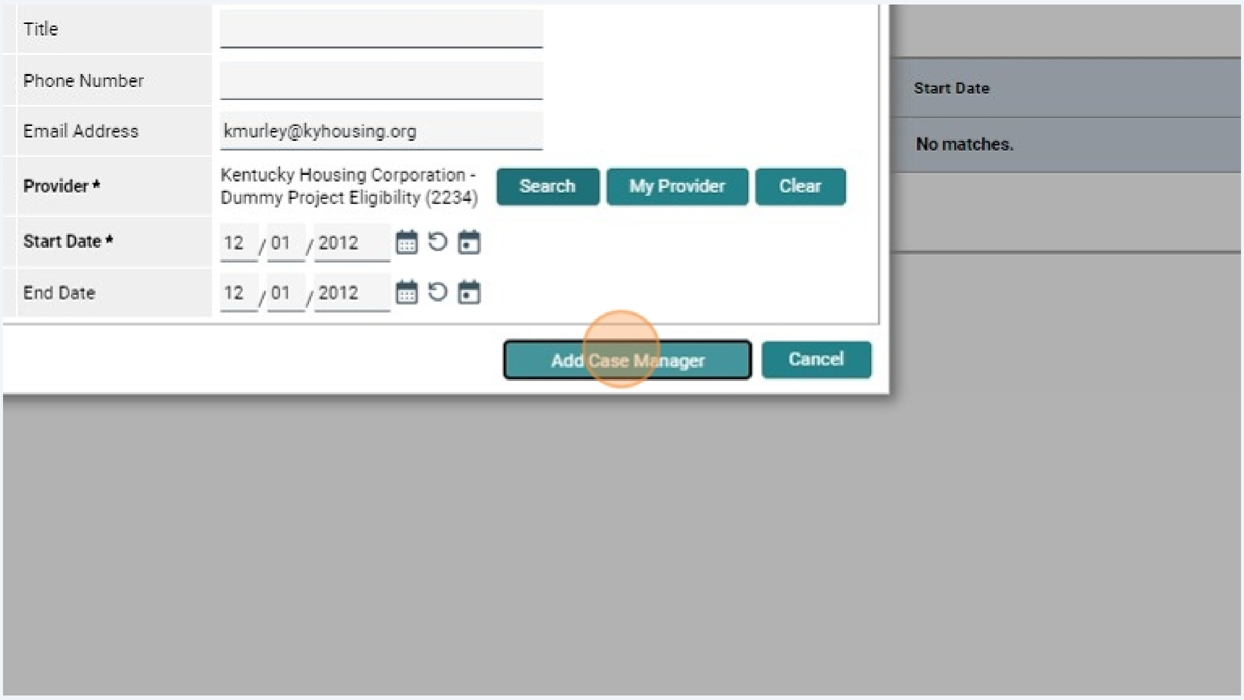
• **"Other"**- will allow manually entered Case Manager information



6 "Provider" will be defaulted to the provider the user is Entering Data As (EDA).

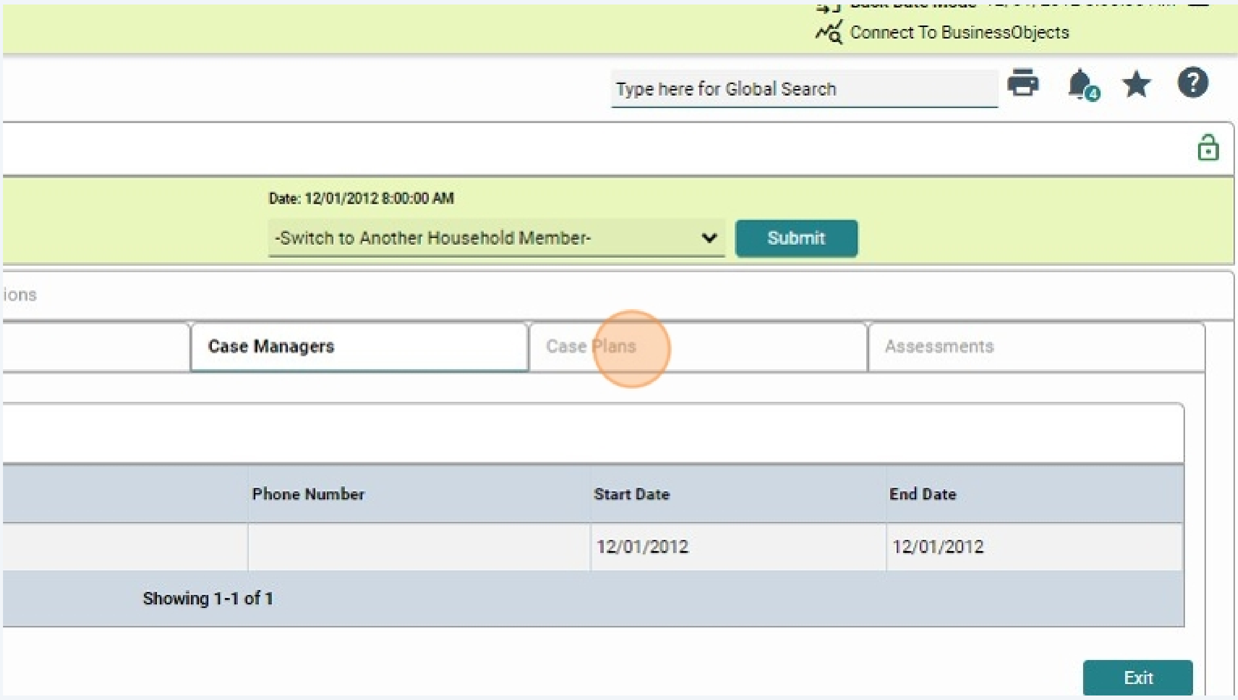


7 Fill in the relevant information, and click "Add Case Manager".

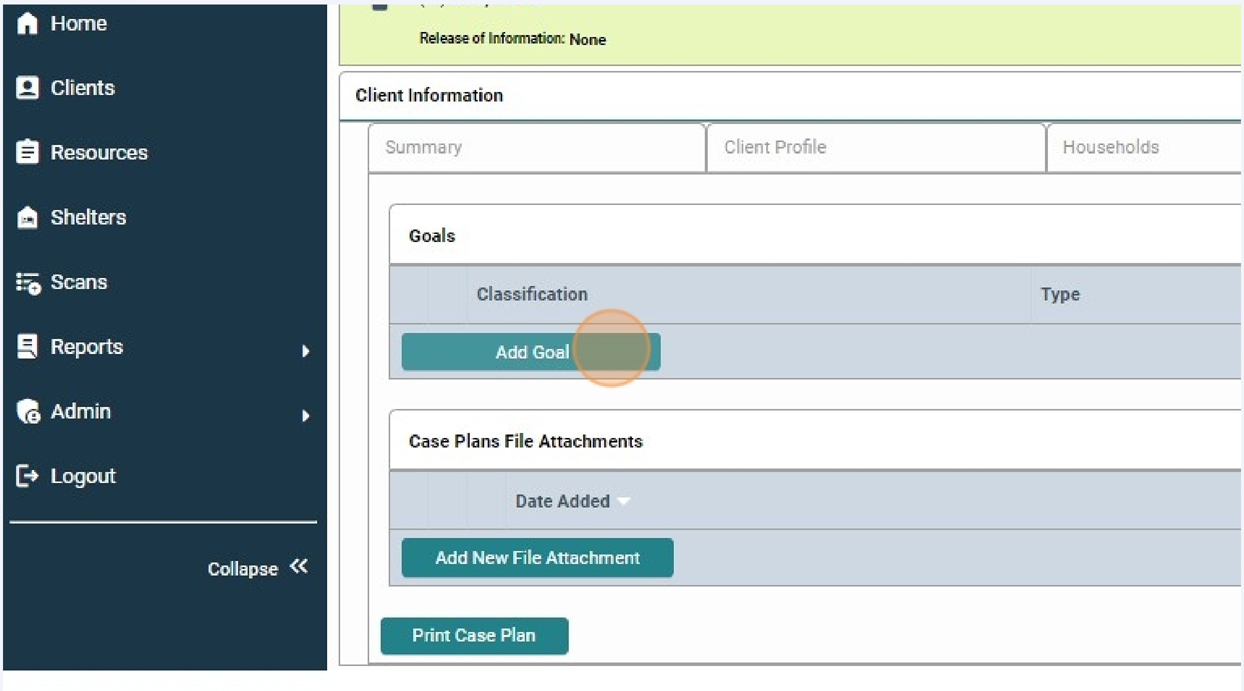


Case Plans

8 Click the "Case Plans" tab within the client record.



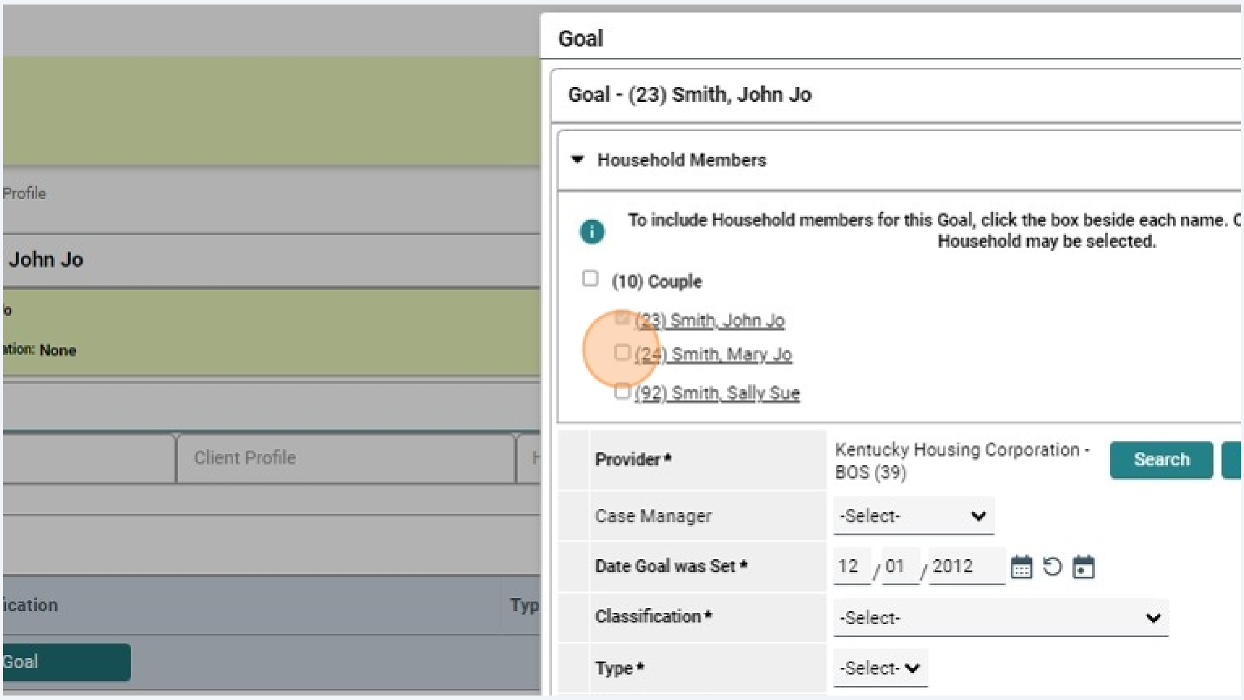
9 Click "Add Goal".



Tip!

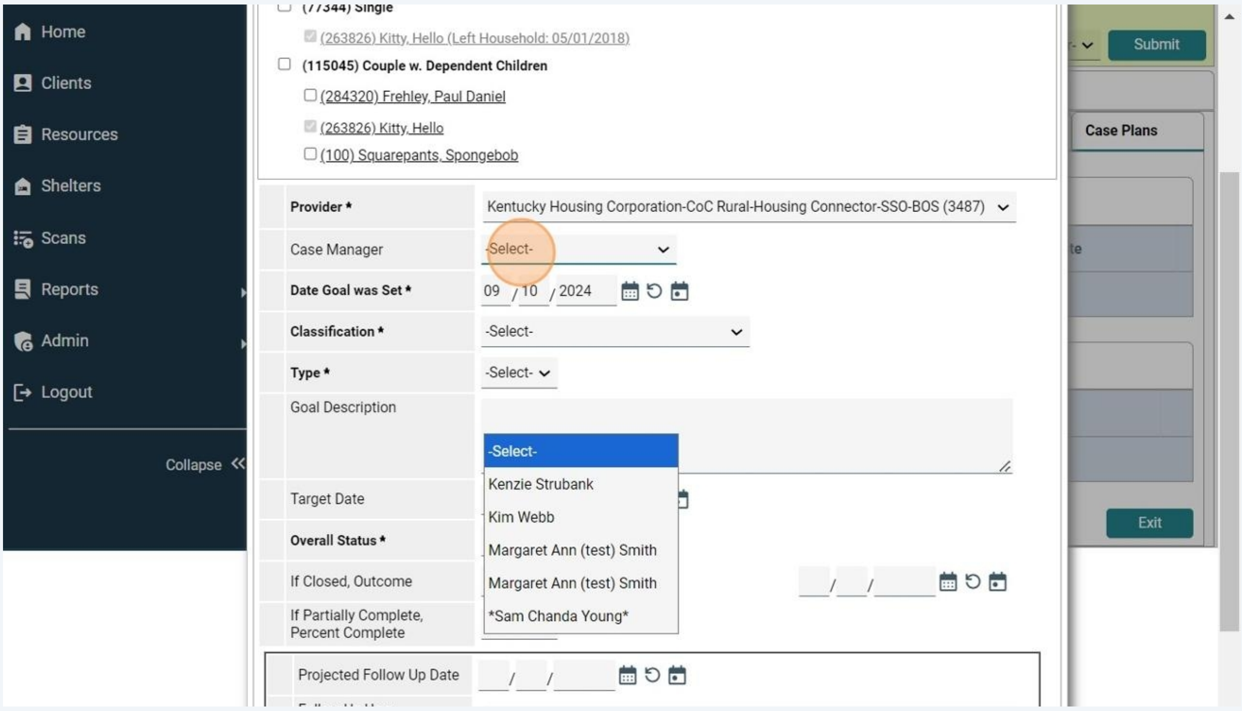
In this section, Goal Classification, Action Steps, Case Notes and related Service Transactions can be added.

10 Select the appropriate household members that the Goal applies to.



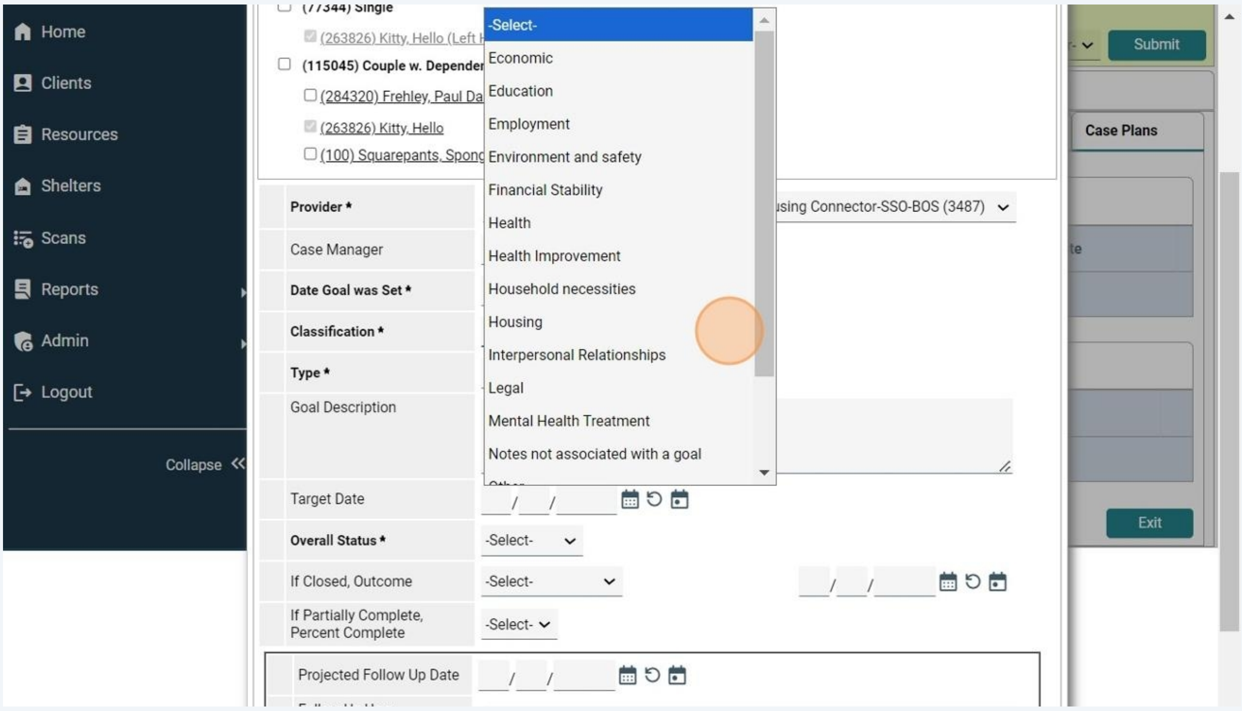
11 Select the Case Manager who will be working with the client.

Enter the "Date Goal was Set". *Date is defaulted to the current System or Back Date.*



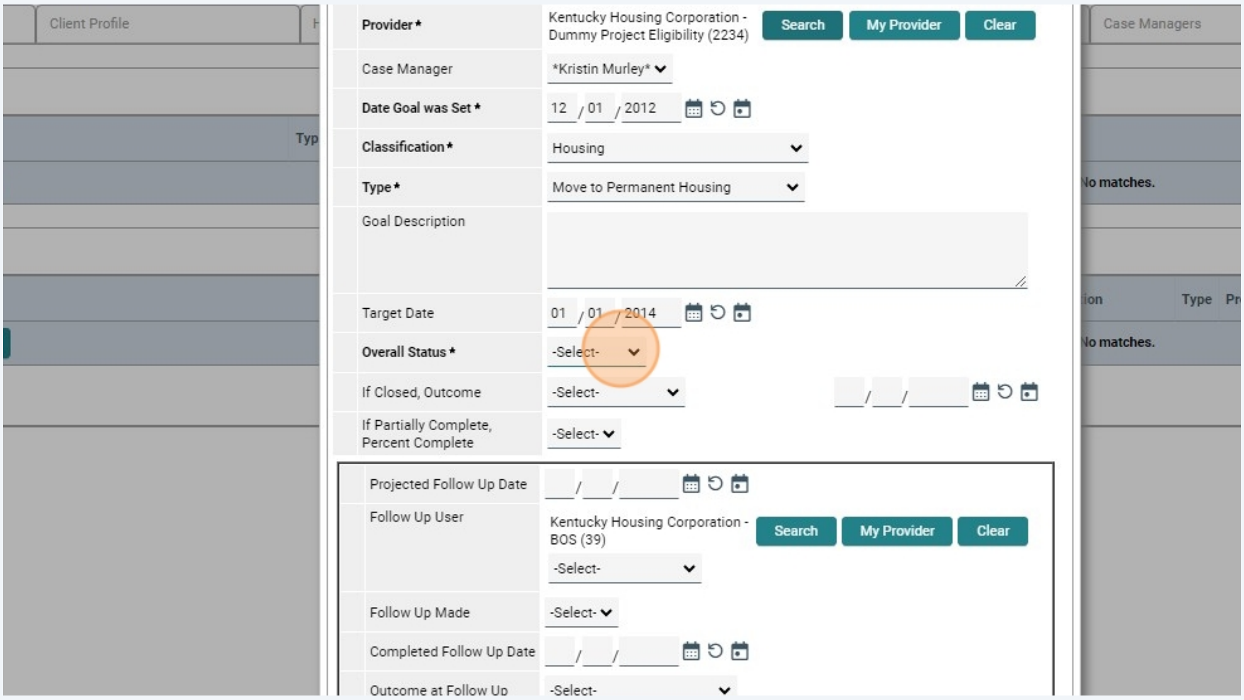
12 Select your "Classification" and "Type"- *what kind of goal is it?*

Enter the "Goal Description".



13 Select the "Target Date".

Select the "Overall Status".



Tip!

The questions in bold are required to be answered to save the goal.

Create Goals, Action Steps, and Case Notes to assist clients in planning self sufficiency and track outcomes!

Once the goal is saved, different areas on the screen are available to be completed. It depends on your agency's workflow which of these areas would need to be filled out.

14

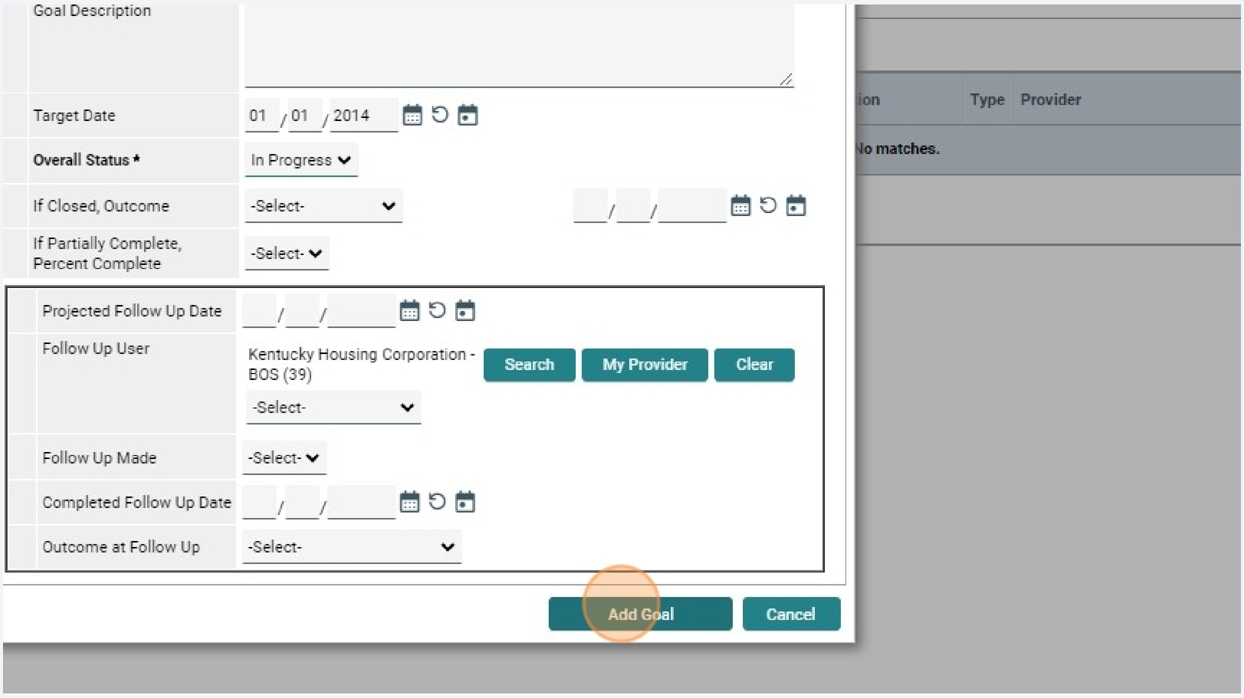
If necessary, create a follow-up.

• This will create a reminder within the "Home Page" Dashboard within the "Follow-Up" Dashlet.

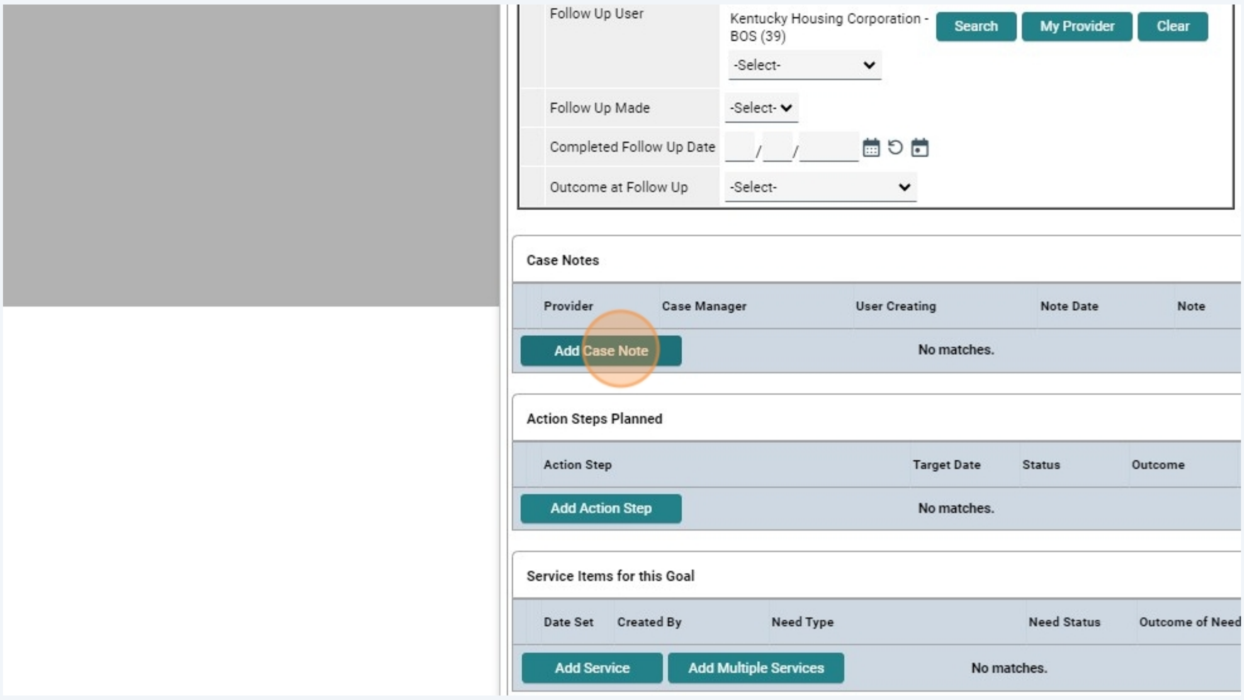
Assign the date the follow-up should be done by, and the user who should follow-up, if necessary.

Once the follow-up has been made at a later date, the following fields can be answered: "Follow-up Date", "Completed Follow-up Date", and the "Outcome".

Then click "Add Goal".



15 Click "Add Case Note".

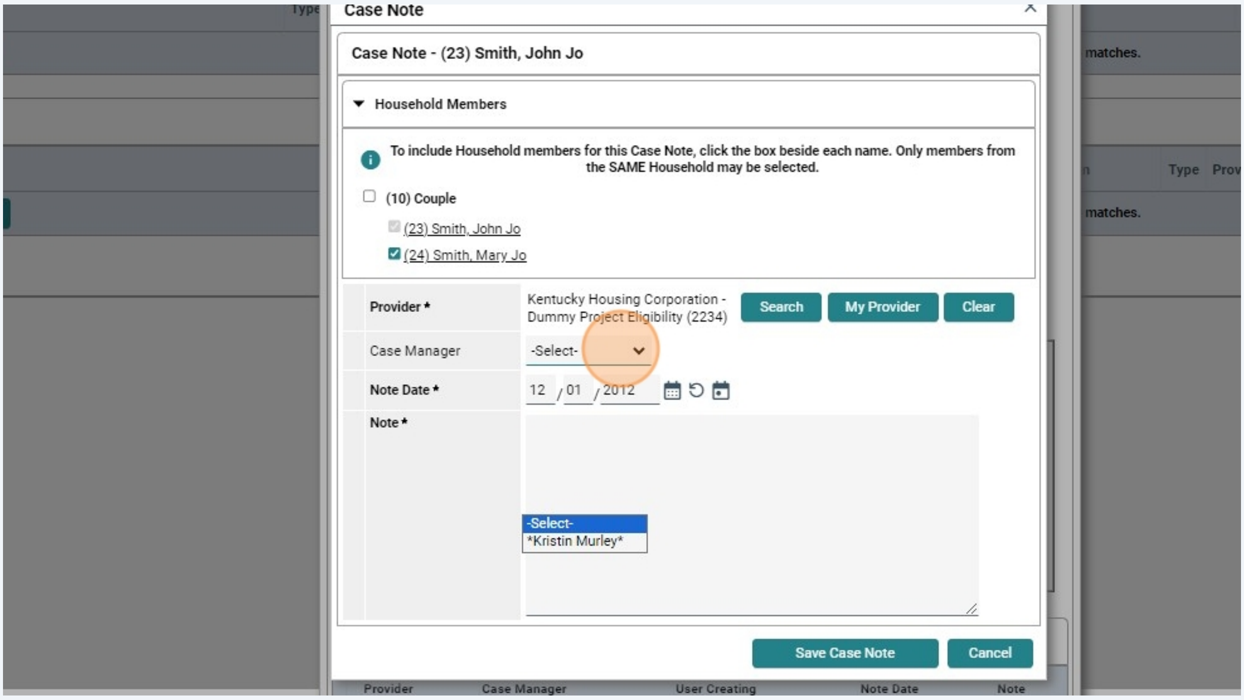


16 Enter your Case Note information.

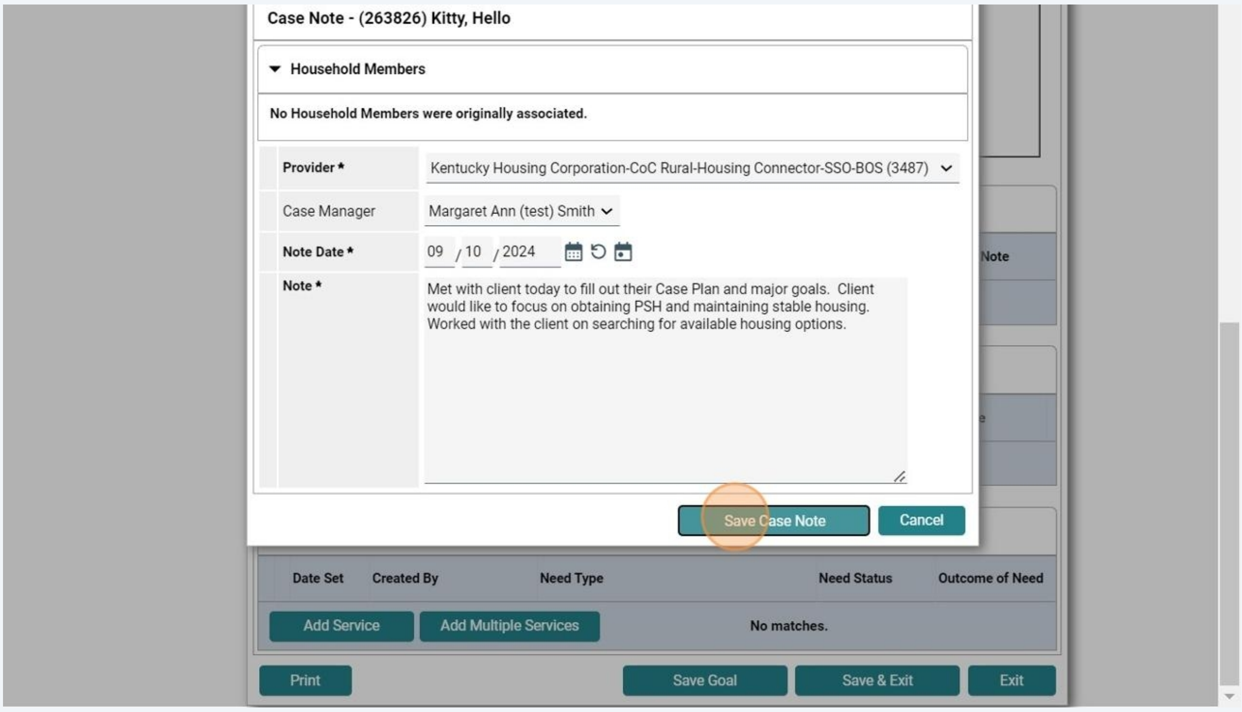
Entering Case Notes allows you to record:

- Progress & accomplishments towards the Client's goals.
- Important notes for the other staff or to document a call with a landlord, etc.
- Times you met with the Client or talked to them over the phone, etc.
- Add Action Plan- *click "Add Action Step" field.*

17 Complete the Case Note(s).

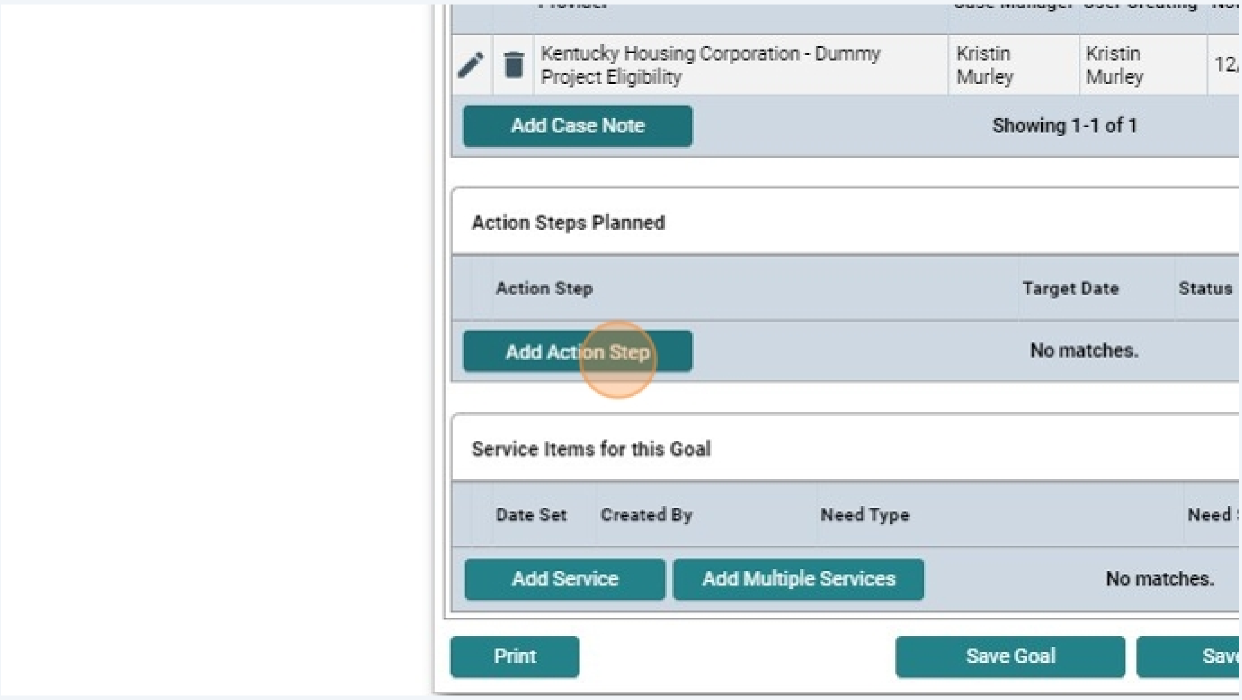


18 Click "Save Case Note" when finished.

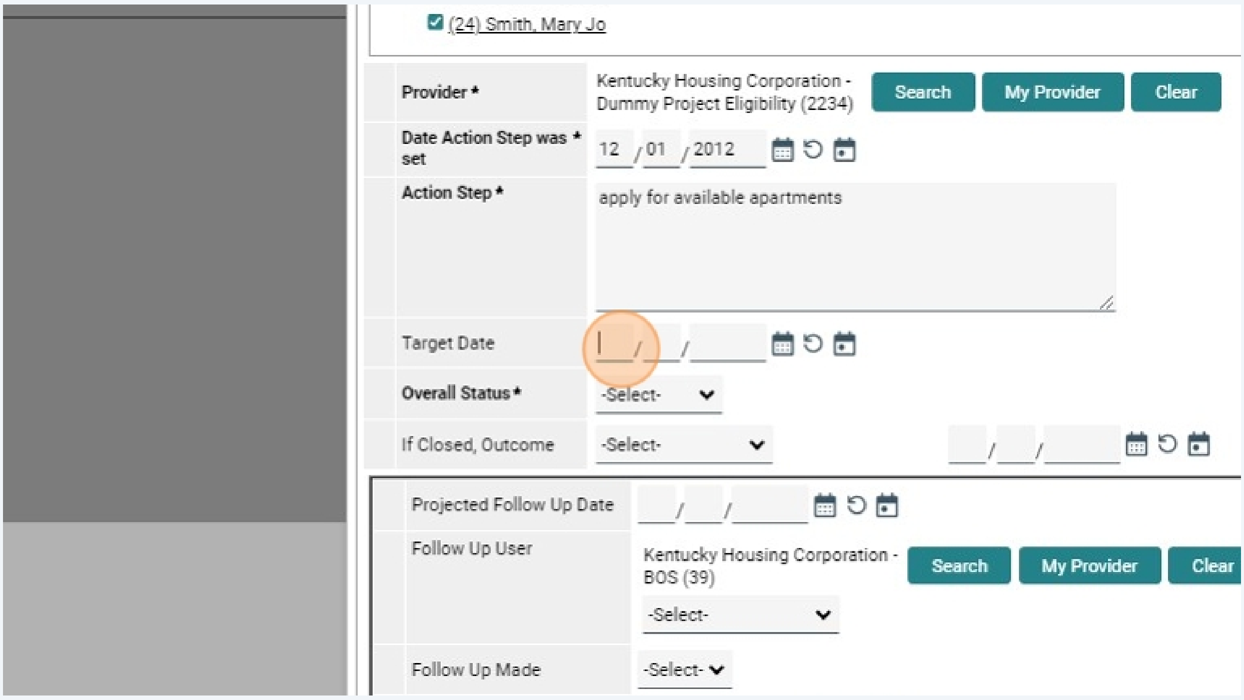


19 Add Action Plan.

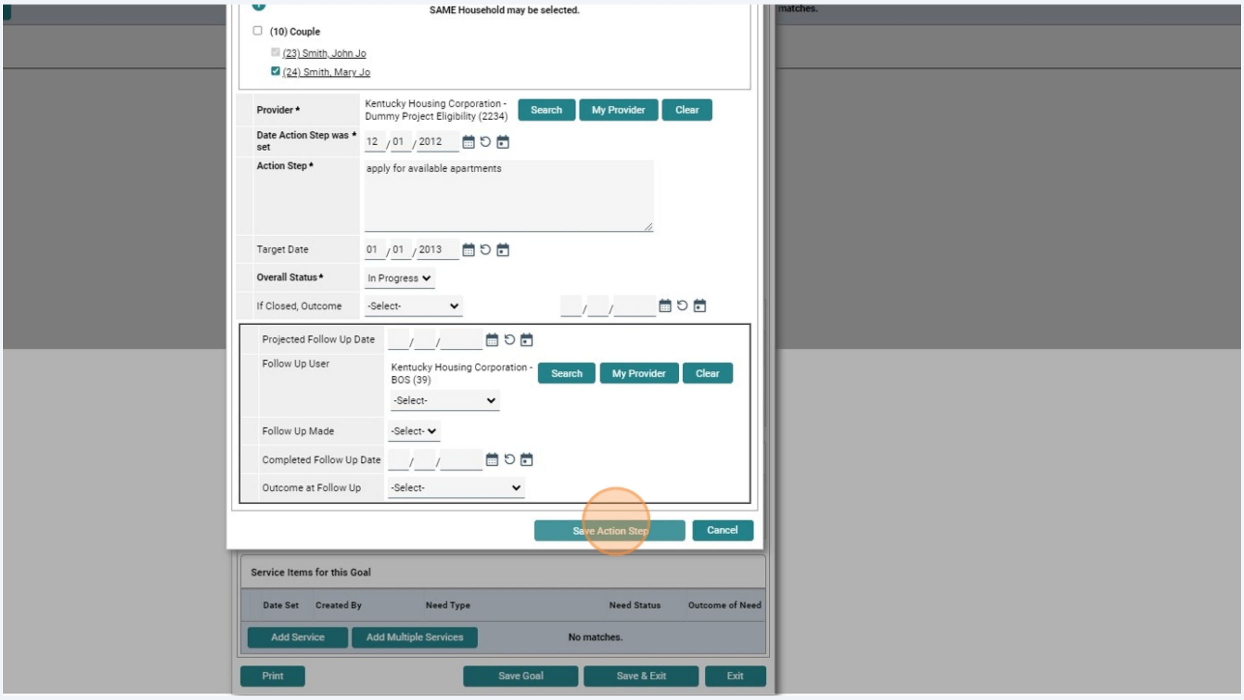
Click "Add Action Step" field.



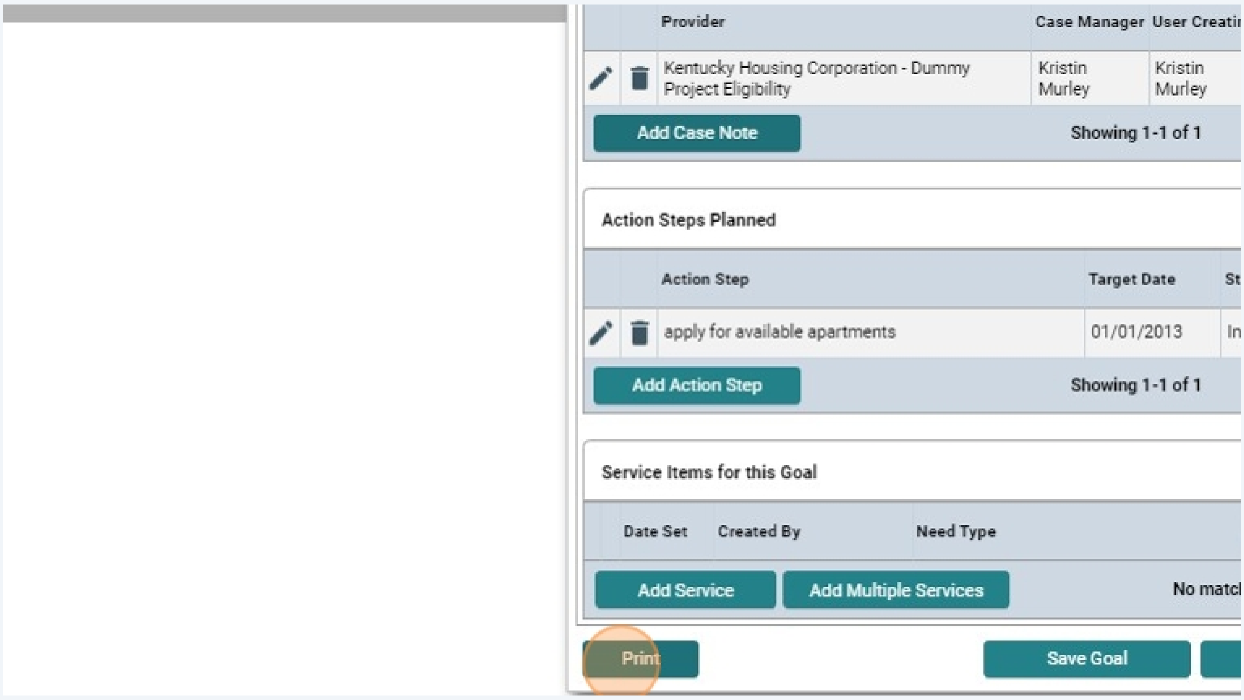
20 This is a free text area so the user can be specific.



21 Click "Save Action Step" when finished.

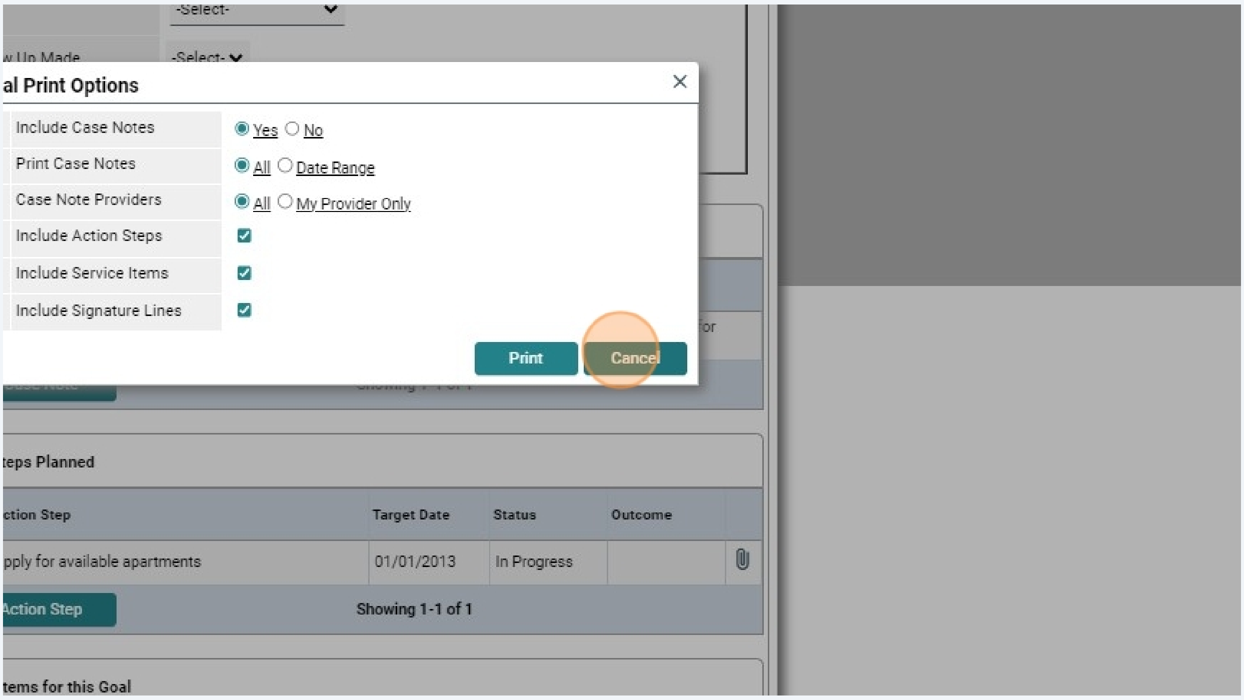


22 Click "Print" to print the Case Plan for your client.

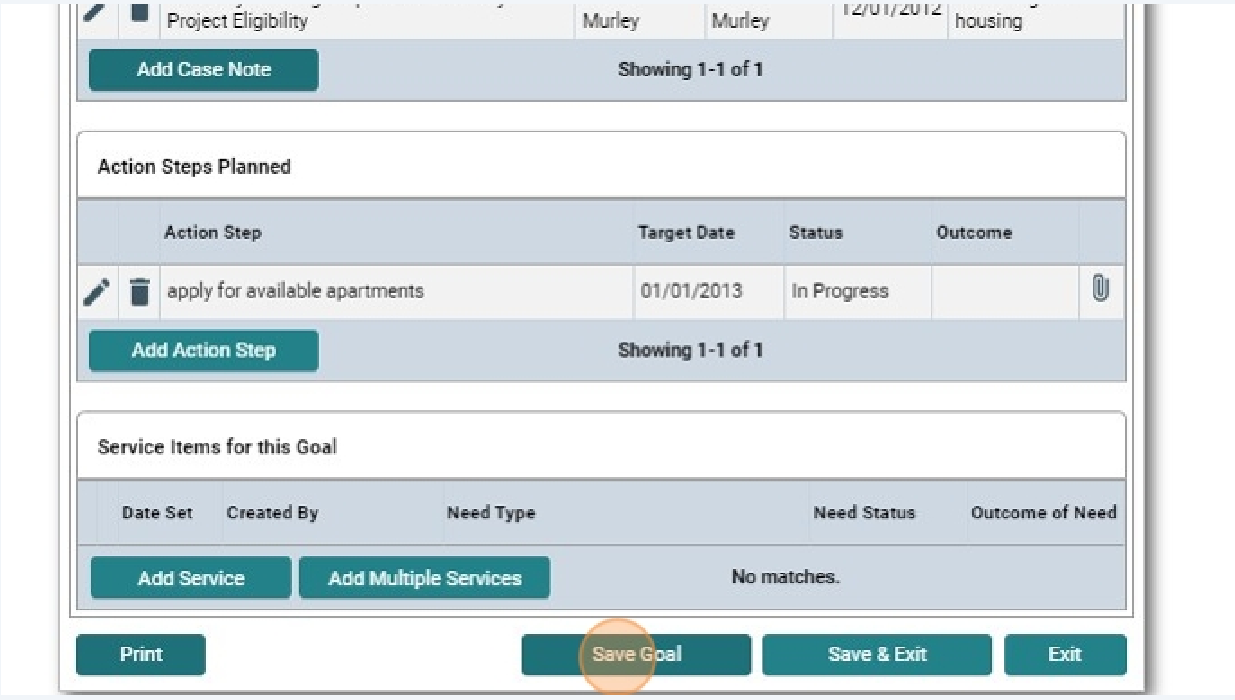


23 Select the desired options.

Then click "Print".



24 Click "Save Goal" or click "Save & Exit" when finished.



⚠ **Alert!**

We will skip "Add Service" within this screen. See the "Service Transactions" section for details on how to add services.

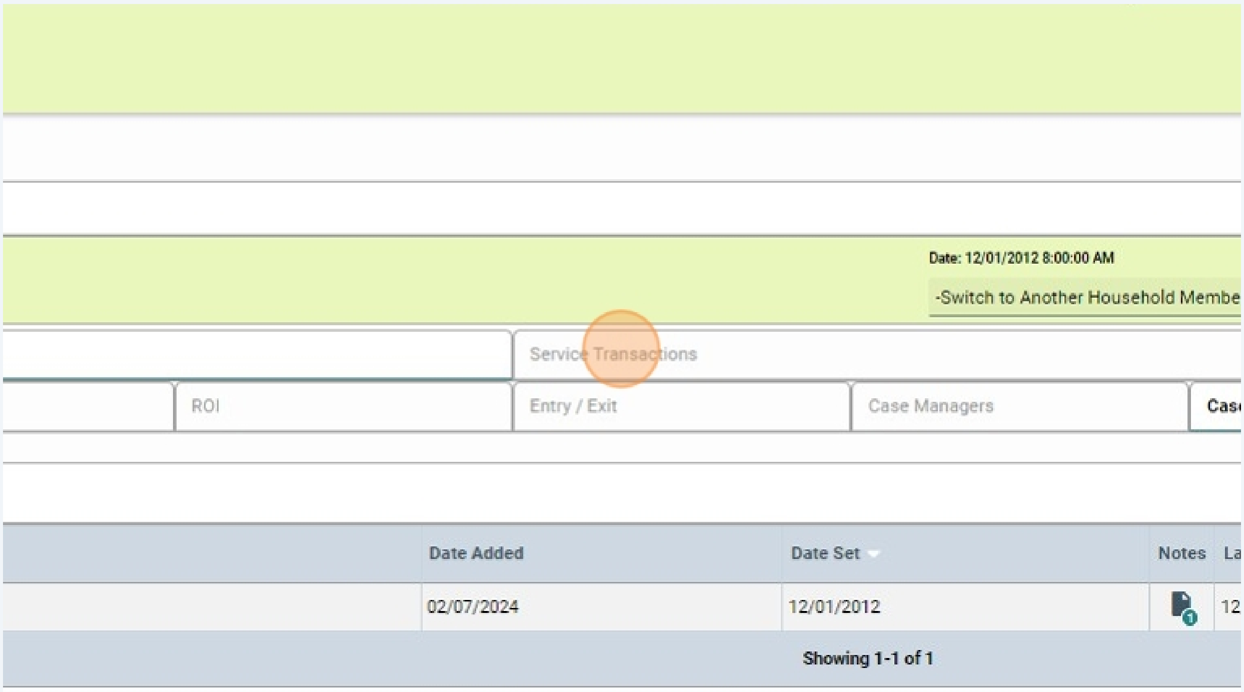
Service Transactions

ⓘ **Tip!**

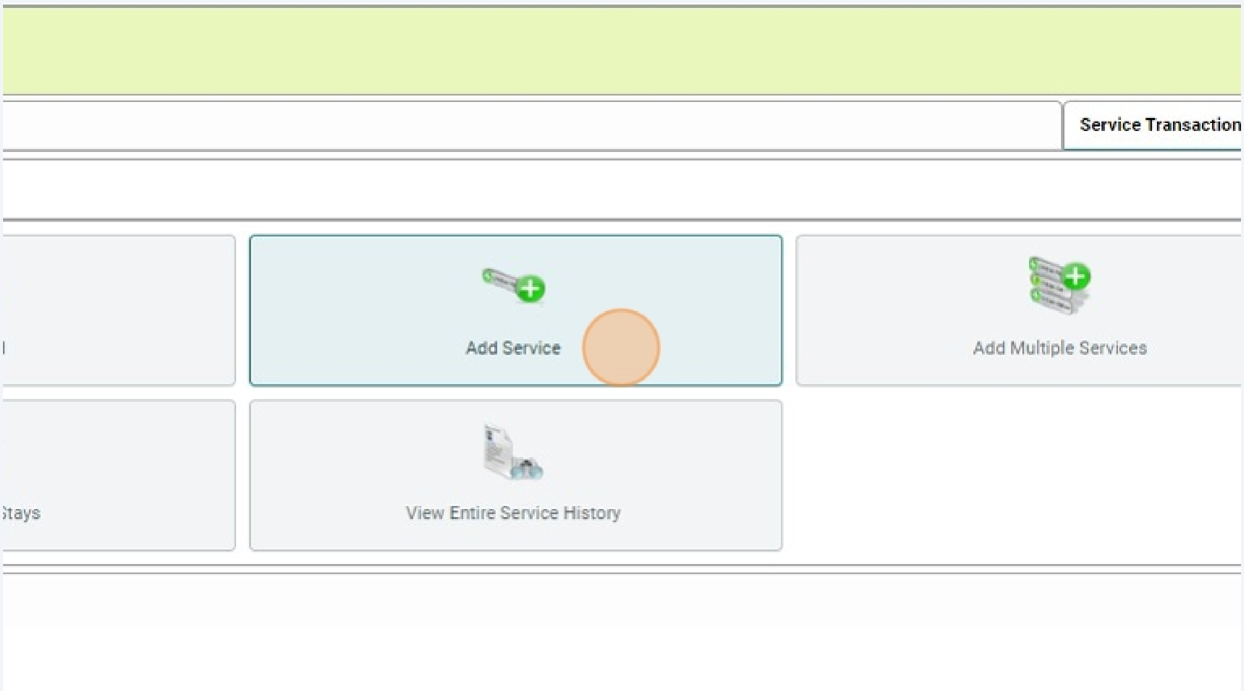
Use the Dashboard to quickly add Needs, Services, Referrals, or to view the client's historical service records.

Service Transactions Workflow

25 Click the "Service Transactions" tab.



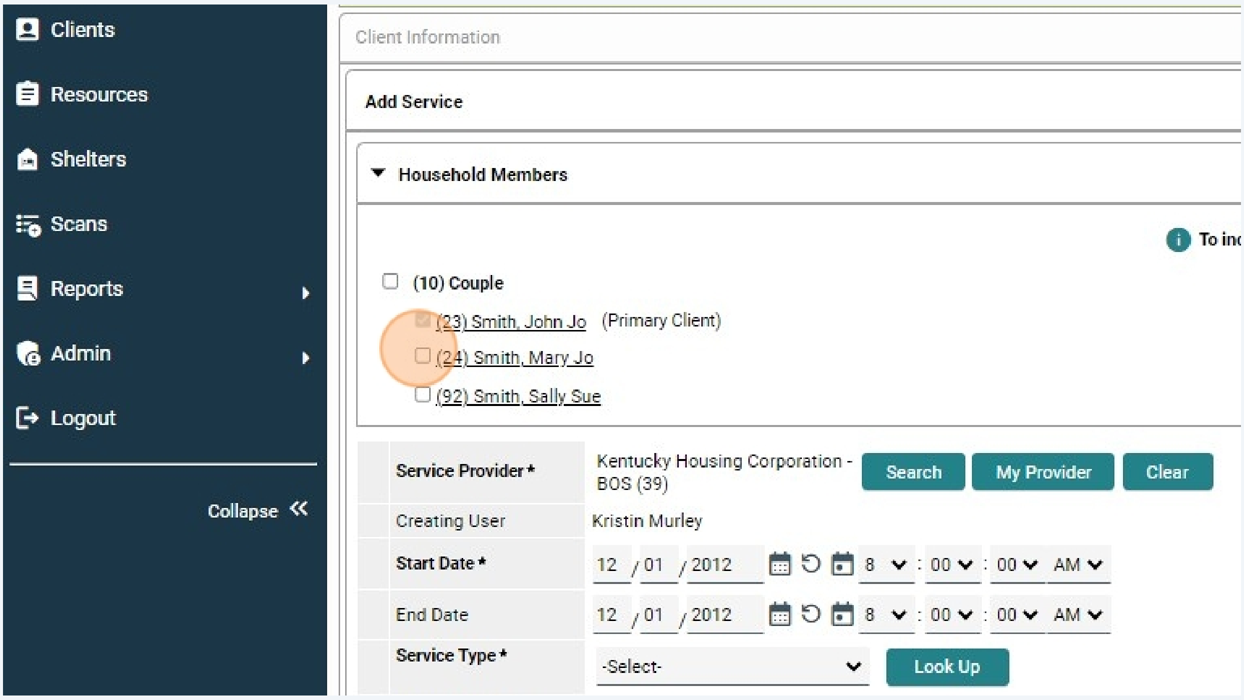
26 Click "Add Service".



Adding a Service

27 Select the appropriate household members (check the household type to include all family members at once).

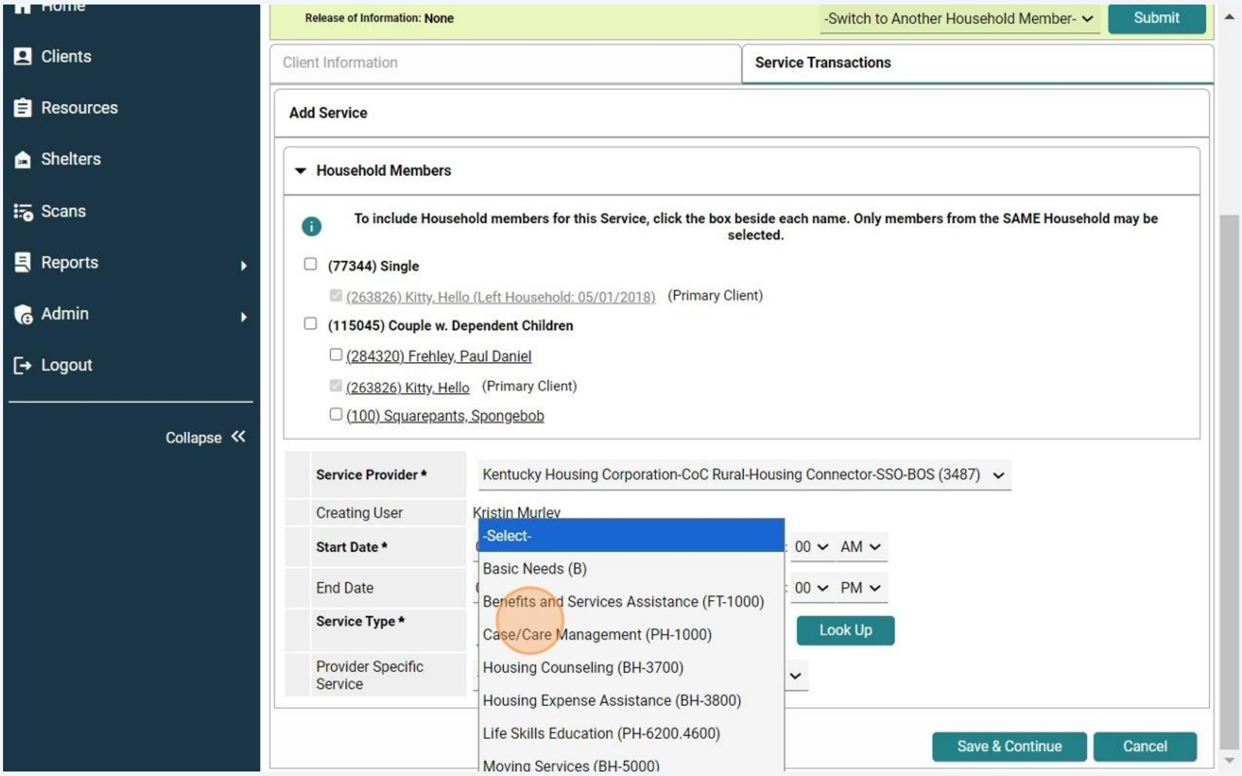
Select your Service Start & End Dates. Date & time will default to either the current System date, or Back Date.



28 Then you will select your "Service Type".

"Service Type" is the general category that the service you are providing falls under.

The "Service Type" list will be pre-populated for you, based on **funding type** & **project type**.



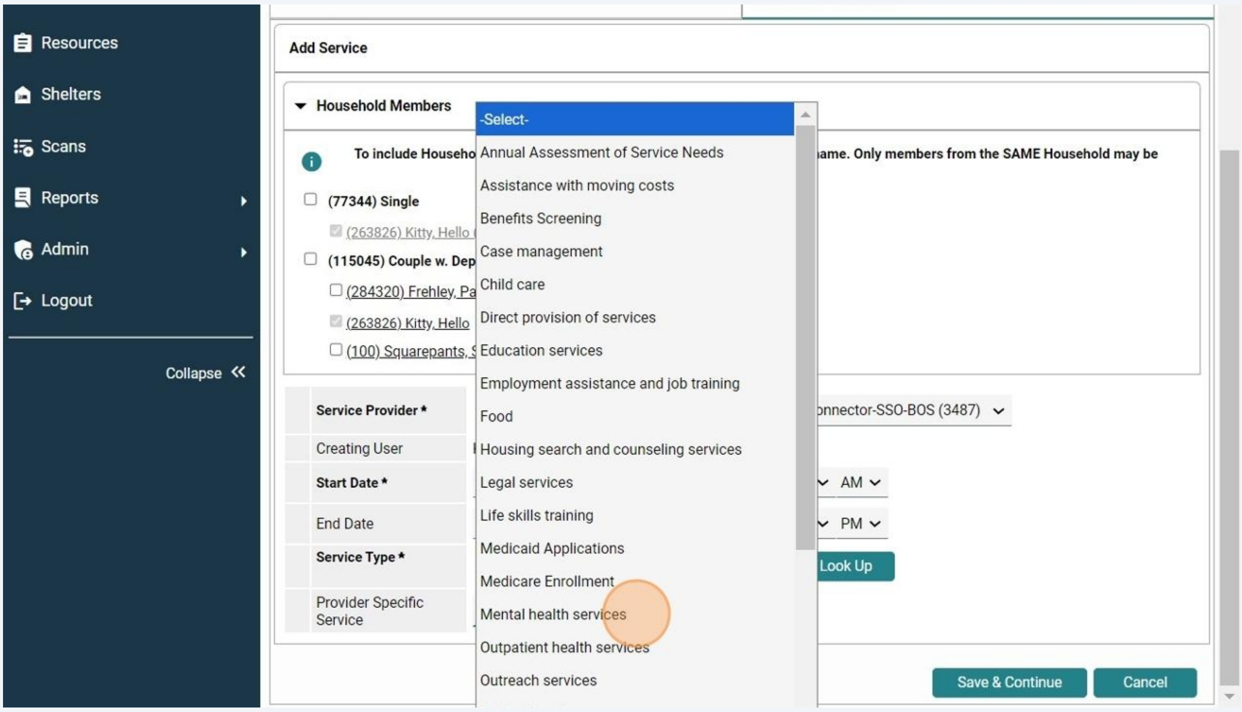
⚠ **Alert!**

DO NOT *use the "Look Up" function. Use the pre-populated list.*

29 Next, select your "Provider Specific Service".

This is the specific service or activity that you are providing for the client(s).

The "Provider Specific Service" list will be pre-populated for you, based on **funding type** & **project type**.

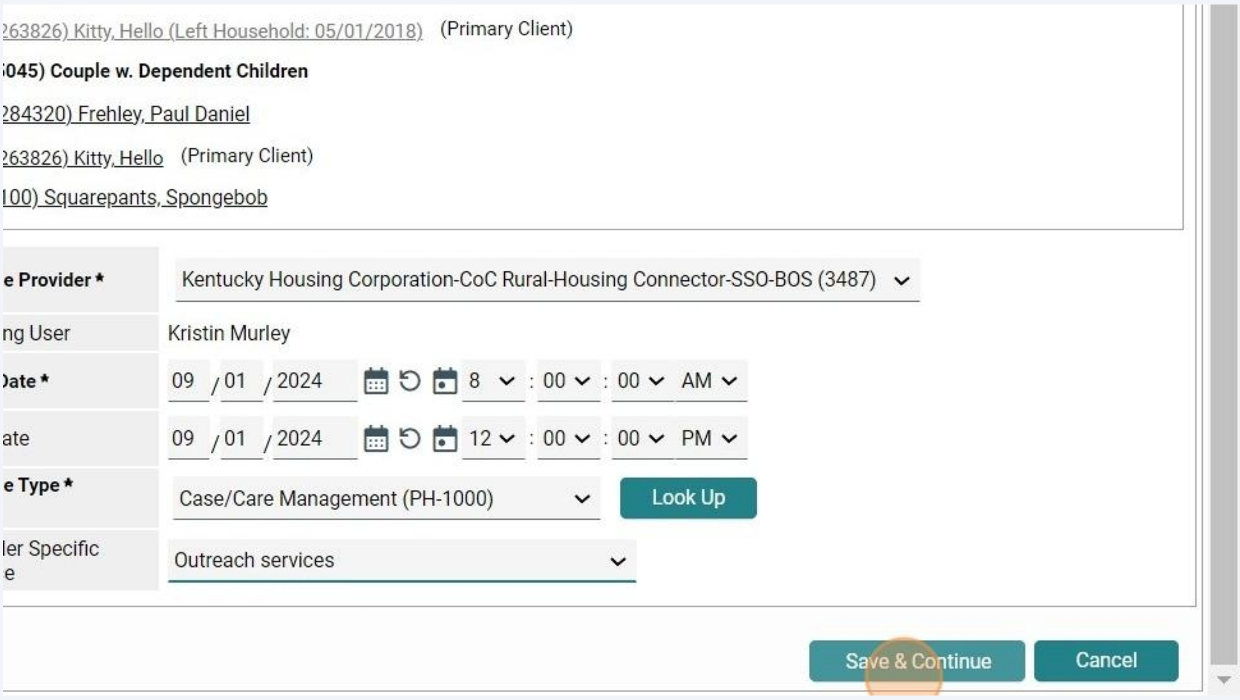


Alert!

Use the ***"Service Transaction Crosswalk"*** *on the HCA Partner Portal to assist you with quickly selecting your "Service Type" & "Provider-Specific Service".*

[Service Transaction and Case Notes - Intake Forms and Crosswalk - effective 10/1/24 – Housing Contract Administration Help Desk (zendesk.com/)]

30 Click "Save & Continue".



Tip!

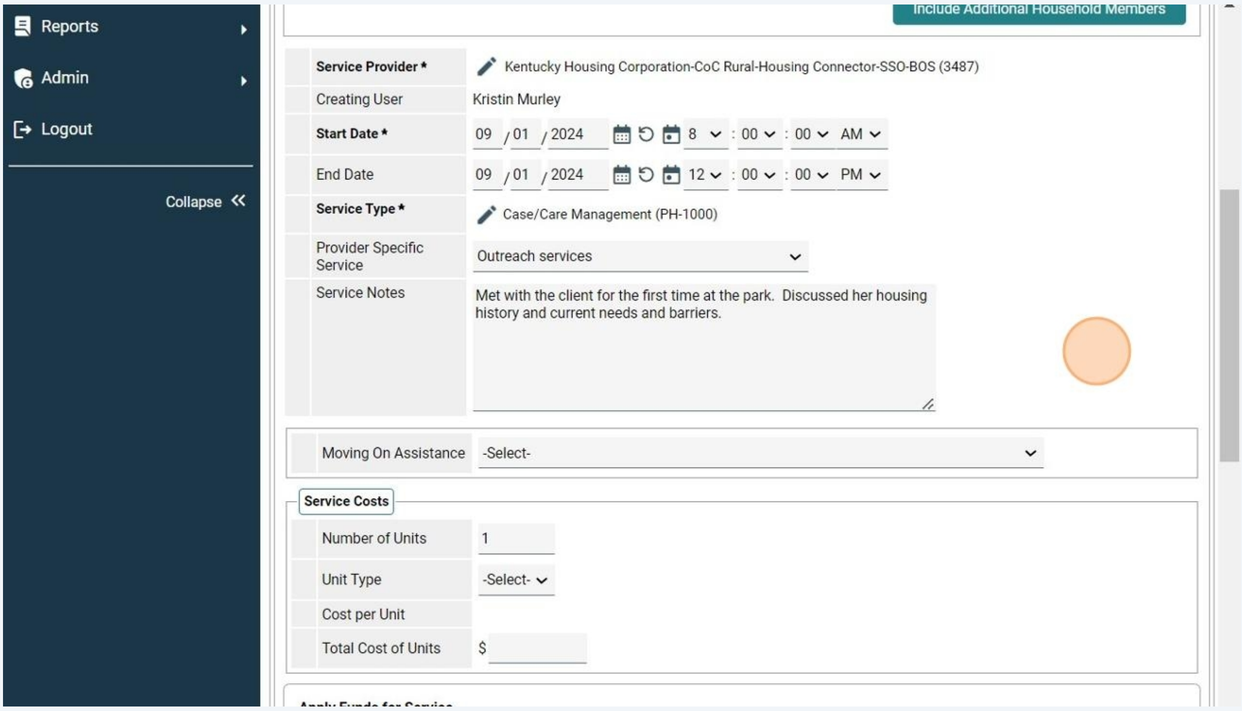
Once the service is saved, different areas on the service screen are available to be completed. It depends on your agency's workflow which of these areas would need to be filled out.

31 Next, fill in your "Service Notes".

This is a brief description of the service that you provided to the client(s).

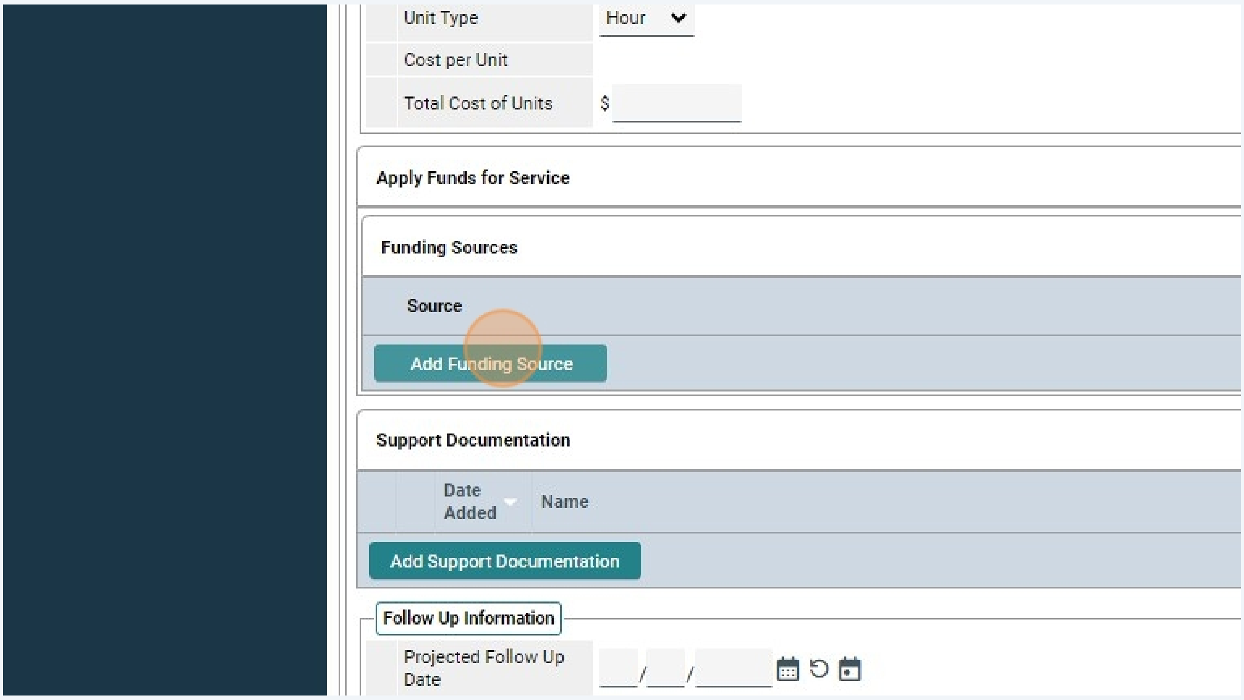
Then, enter your "Service Costs".

These can be tracked via Dollars, Hours, Days, Months & Weeks. *You may or may not have an actual monetary cost to enter here.*

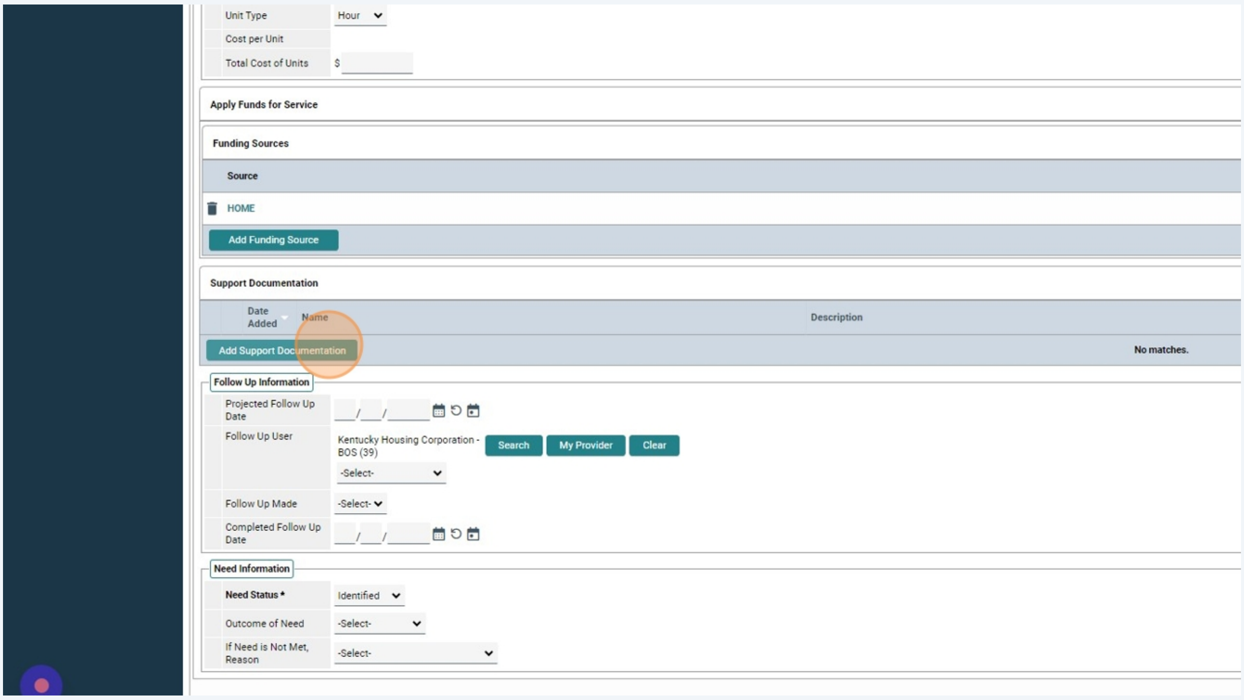


32 Next, record your funding source by clicking "Add Funding Source".

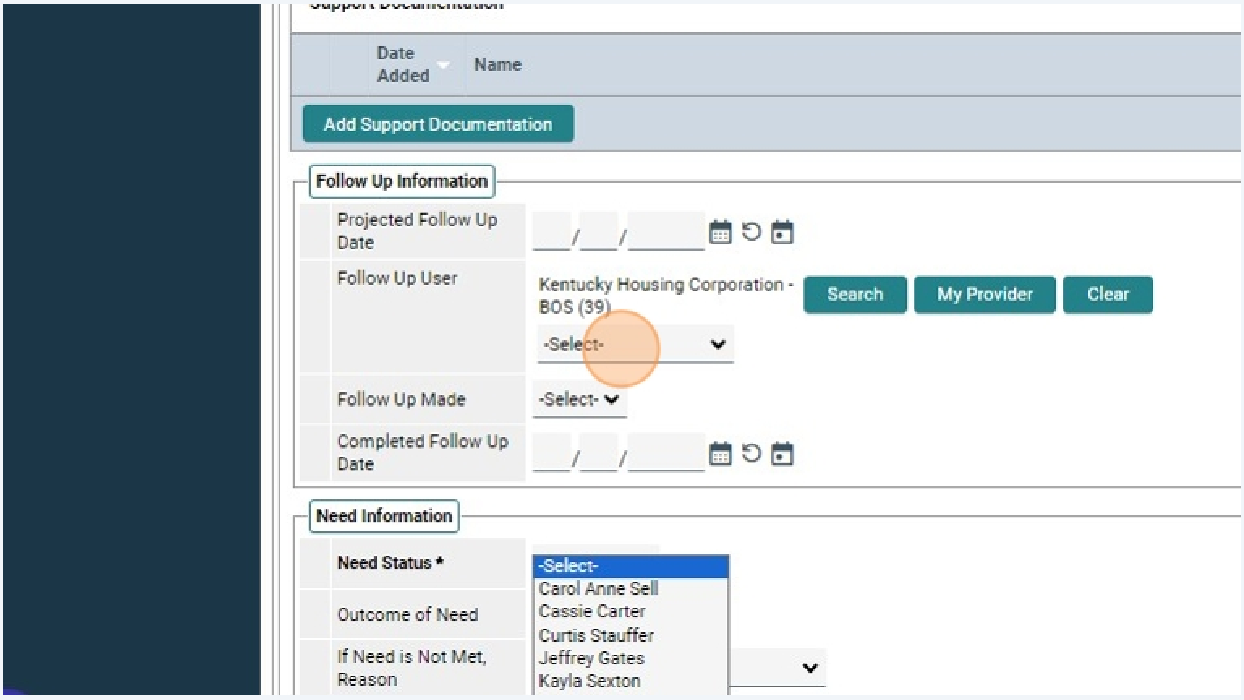
Note- *this feature is only for service transactions with a monetary value attached. To use this feature you must enter a cost.*



33 You can also click on "Add Support Documentation" to attach a copy of any documentation (ex: receipts, lease copy, invoice for moving services, etc.).



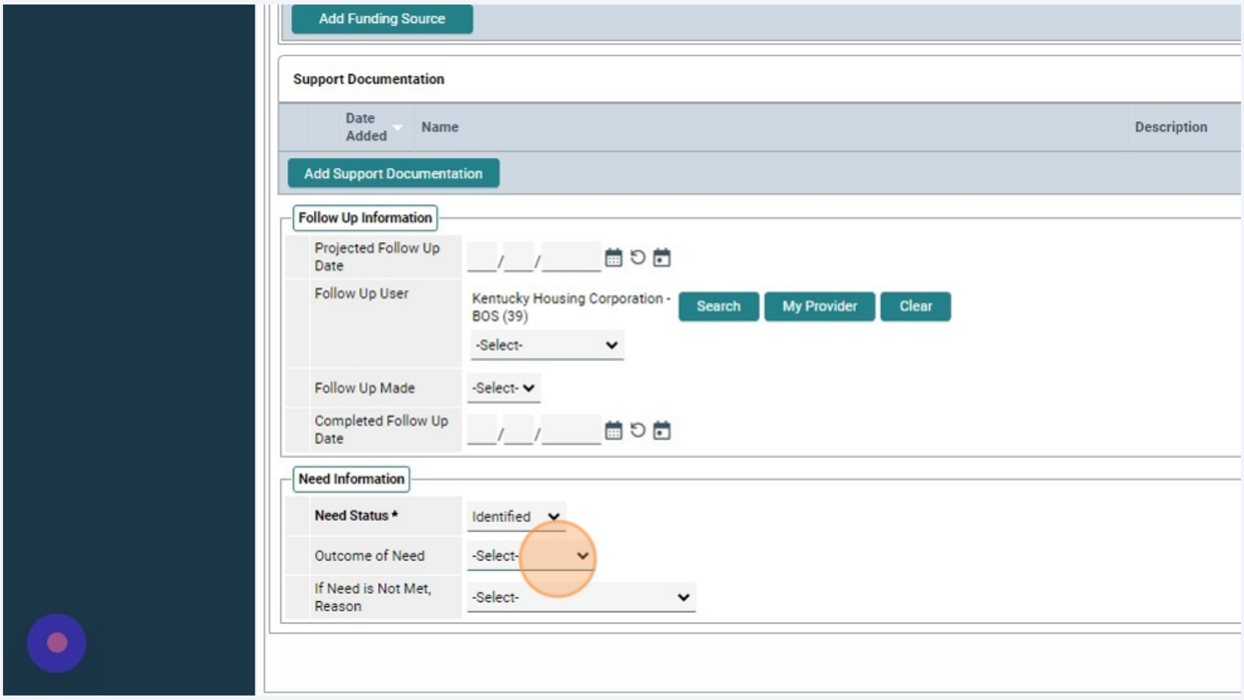
34 Add "Follow Up Information" as necessary. This allows you to assign a user to follow up with this client, and a reminder can be added to your Dashlet when you login in KYHMIS.



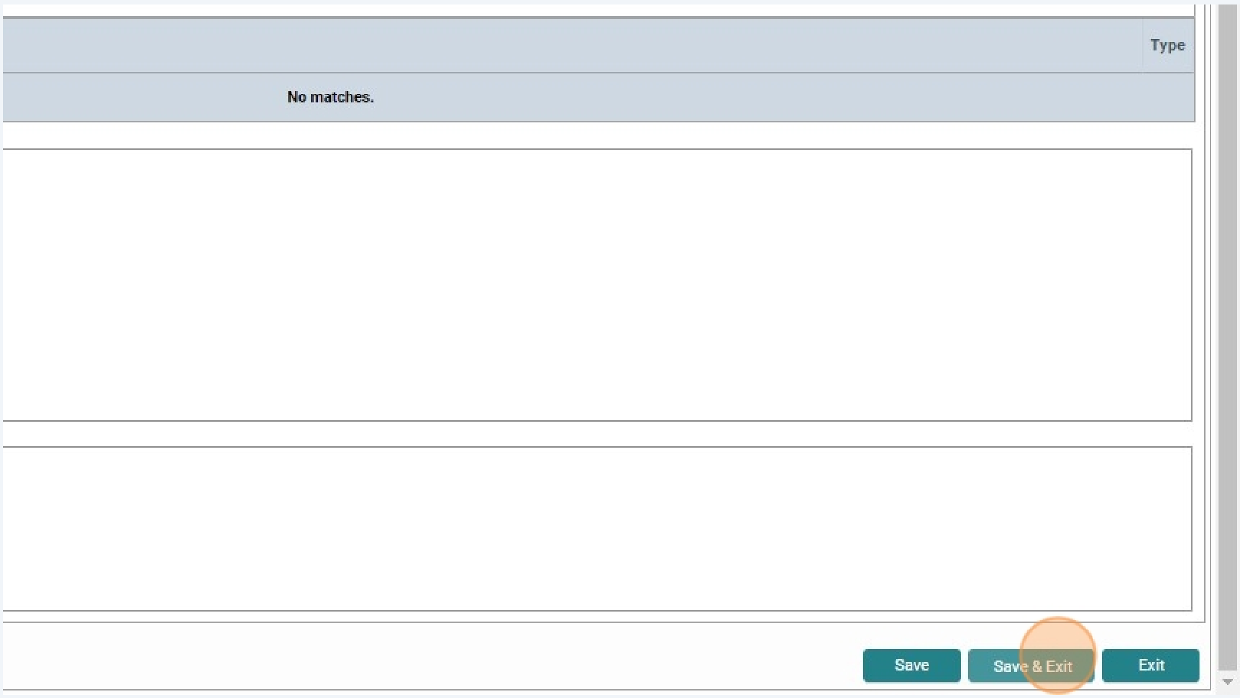
35 "Need Information" for this service will **AUTOMATICALLY** be identified. Use the drop-down menu next to "Need Status" to select the appropriate status.

Select "Outcome" of need if appropriate.

Select "Reason" if not met as appropriate.

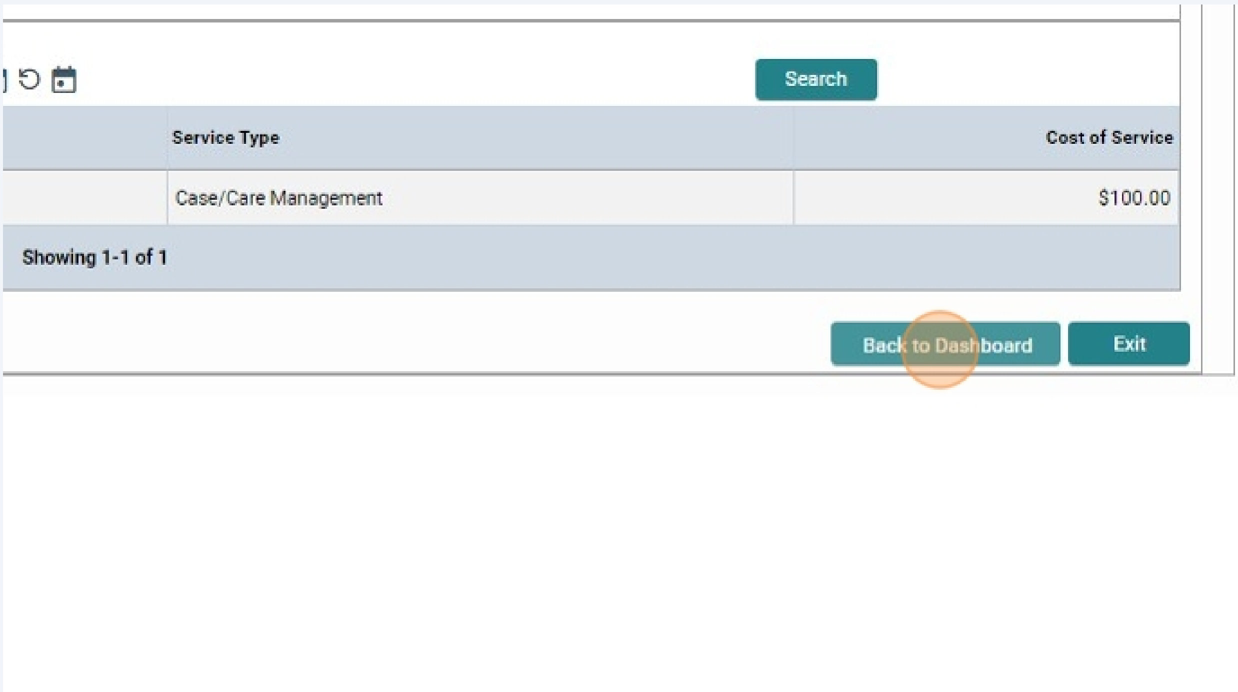


36 Click "Save & Exit".

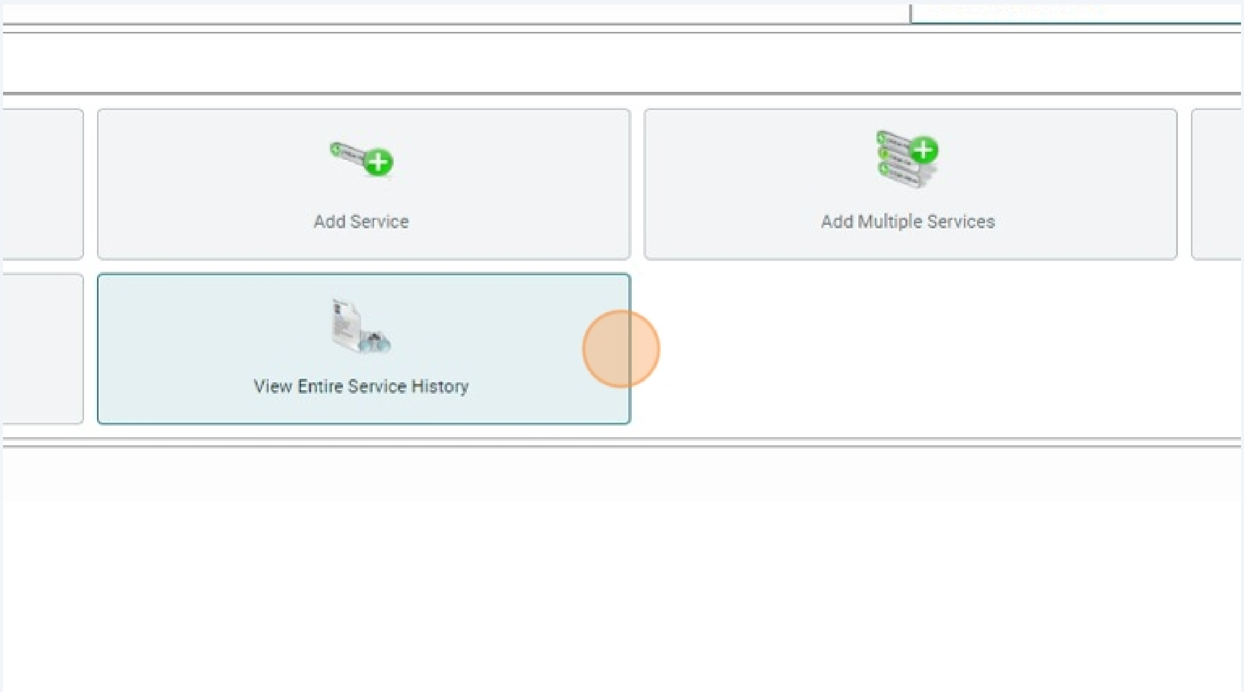


Entire Service History View

37 Review Historical Transactions! Navigate **Back to Dashboard**.



38 Then click "View Entire Service History" to view.



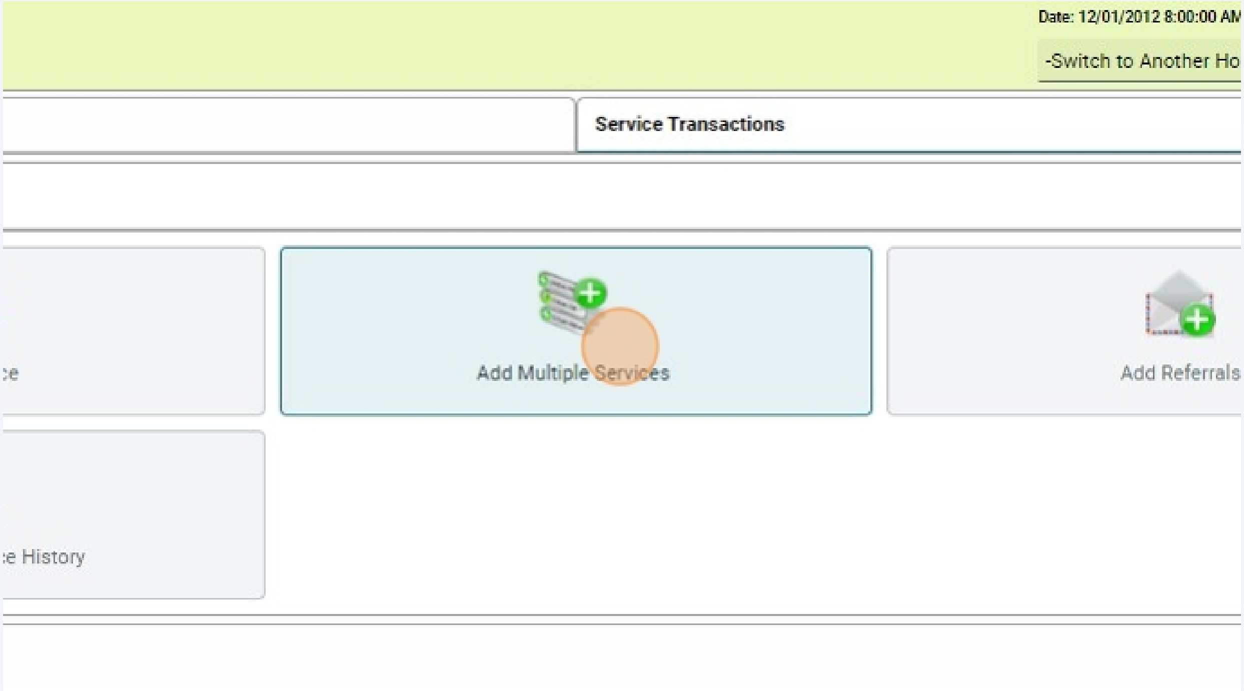
Adding Multiple Services

Tip!

Click "Add Multiple Services" within the Service Transactions Dashboard.

Select multiple services **(of the same service type)** *at one time.*

39 Select "Add Multiple Services" from the "Service Transactions" Dashboard.



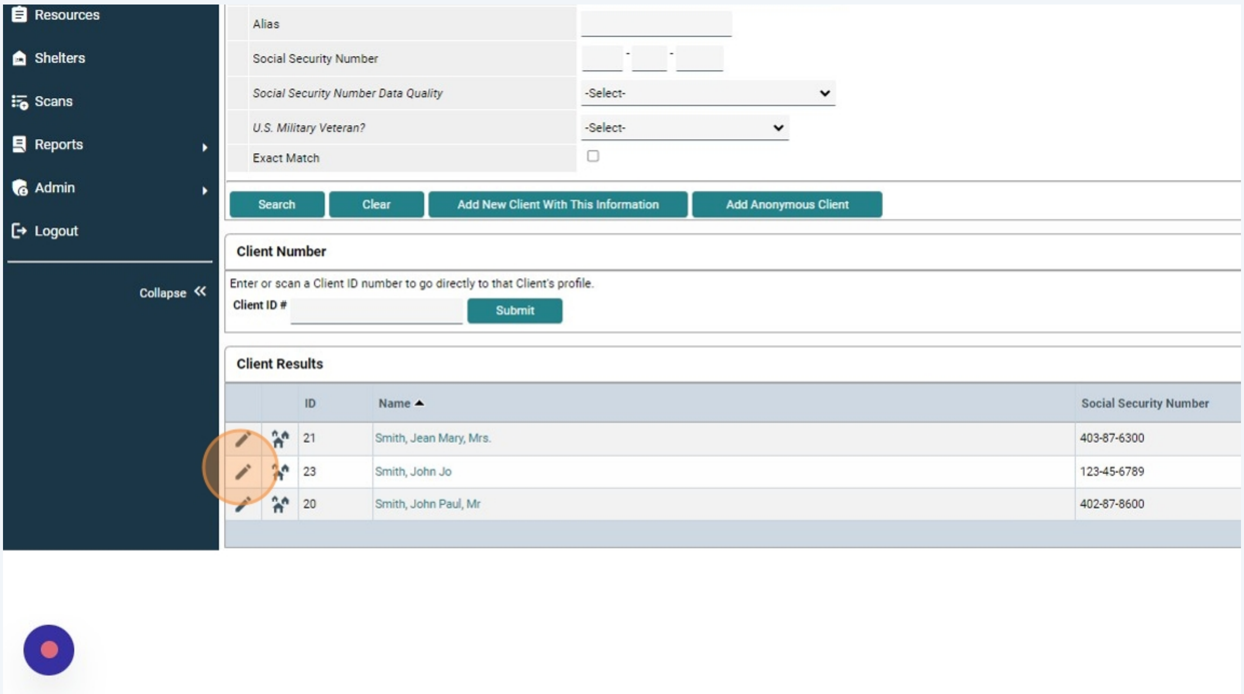
Entry/Exit: Adding Household Members

40 Now we will learn how to add a new member to the household.

The example we will use is adding a child that is born.

41 First, search for the Head of Household/HoH (Parent in this case).

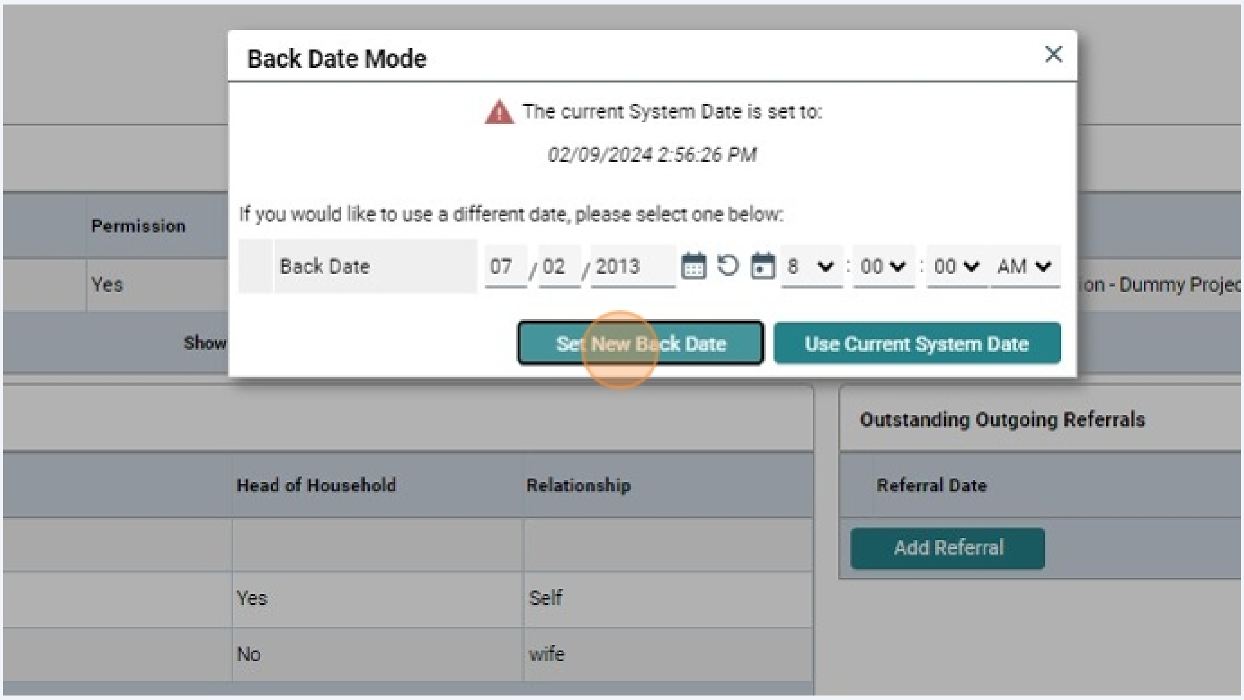
Then select the pencil next to their name to open up their Client Record.



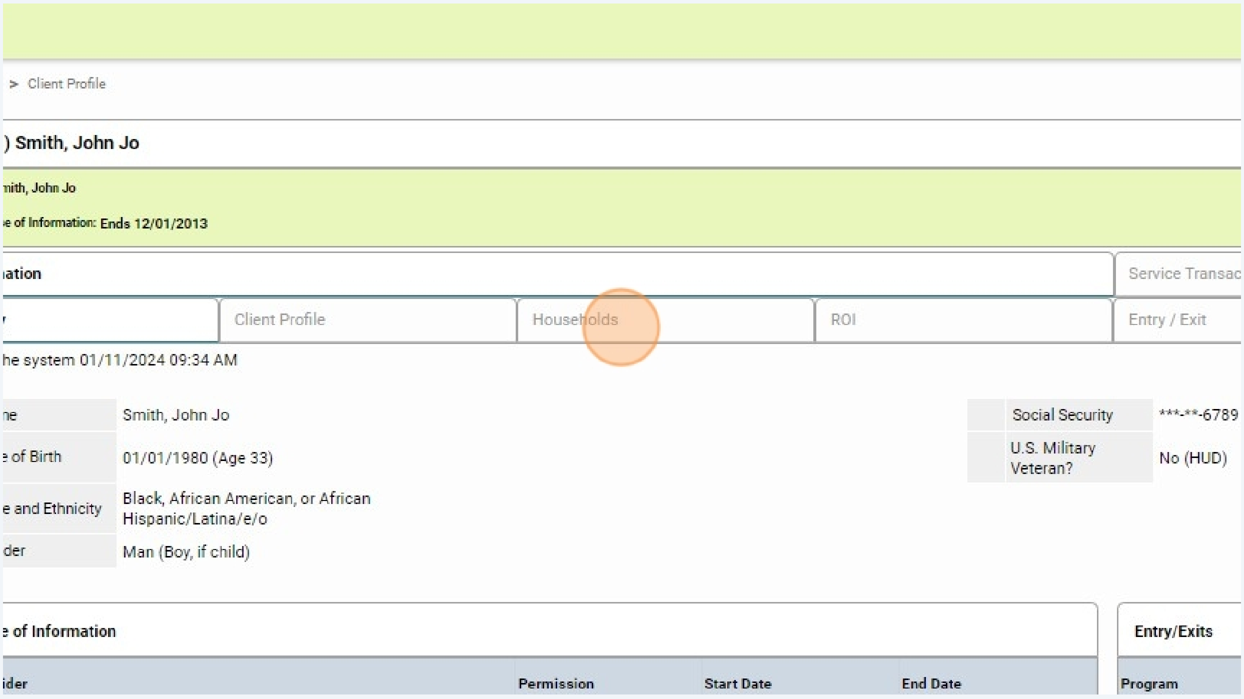
42 Set your Back Date to the date the new person joined the household.

When the new person is a newborn, you will use a date a few days after their Date of Birth.

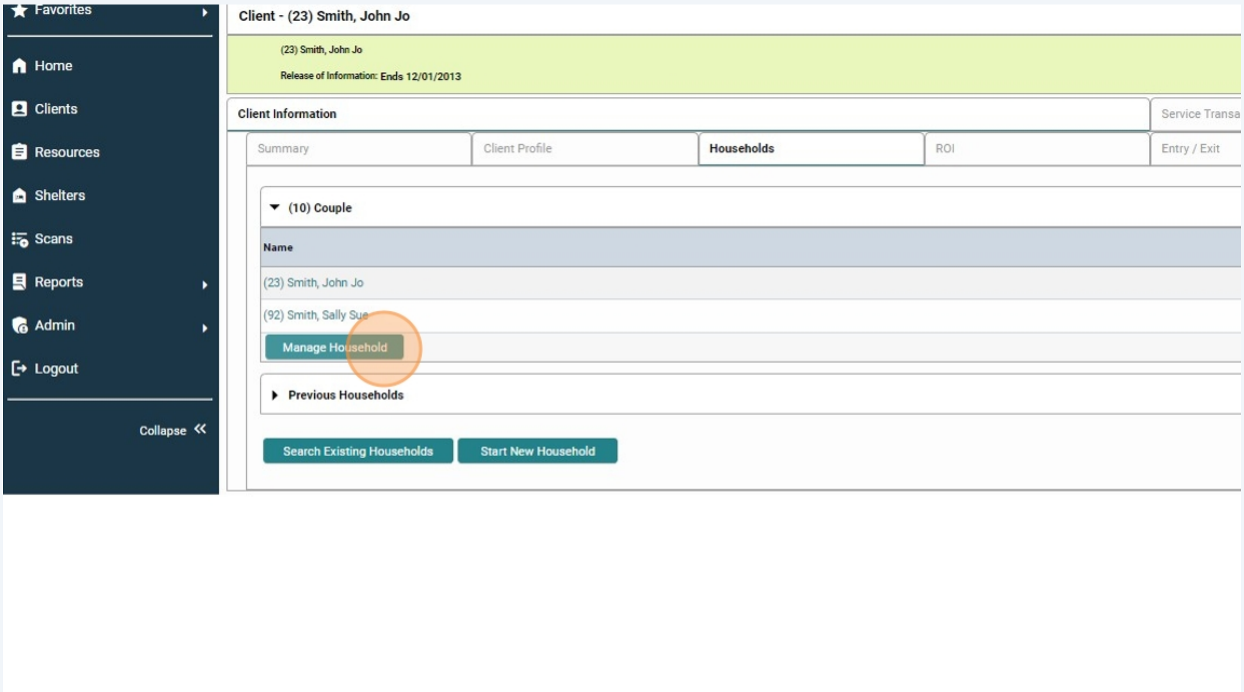
Click "Set Back Date".



43 When adding a new member to the household, first add them on the HoH's "Households" tab.

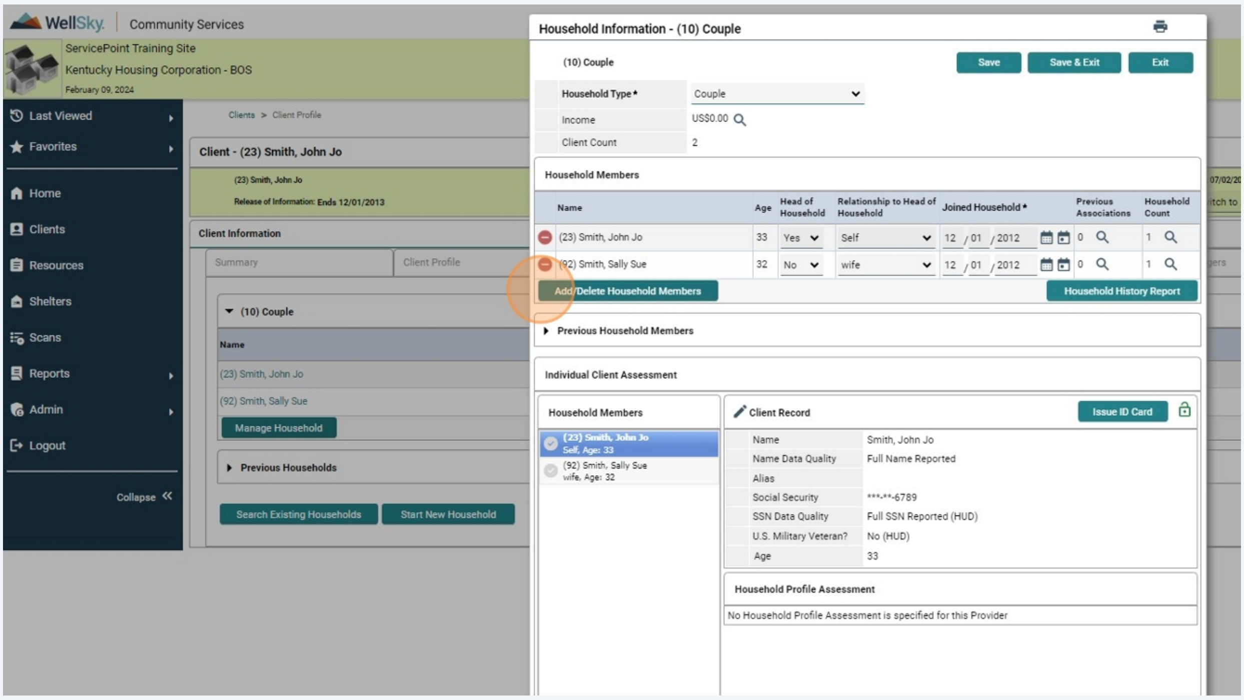


44 Click "Manage Household".

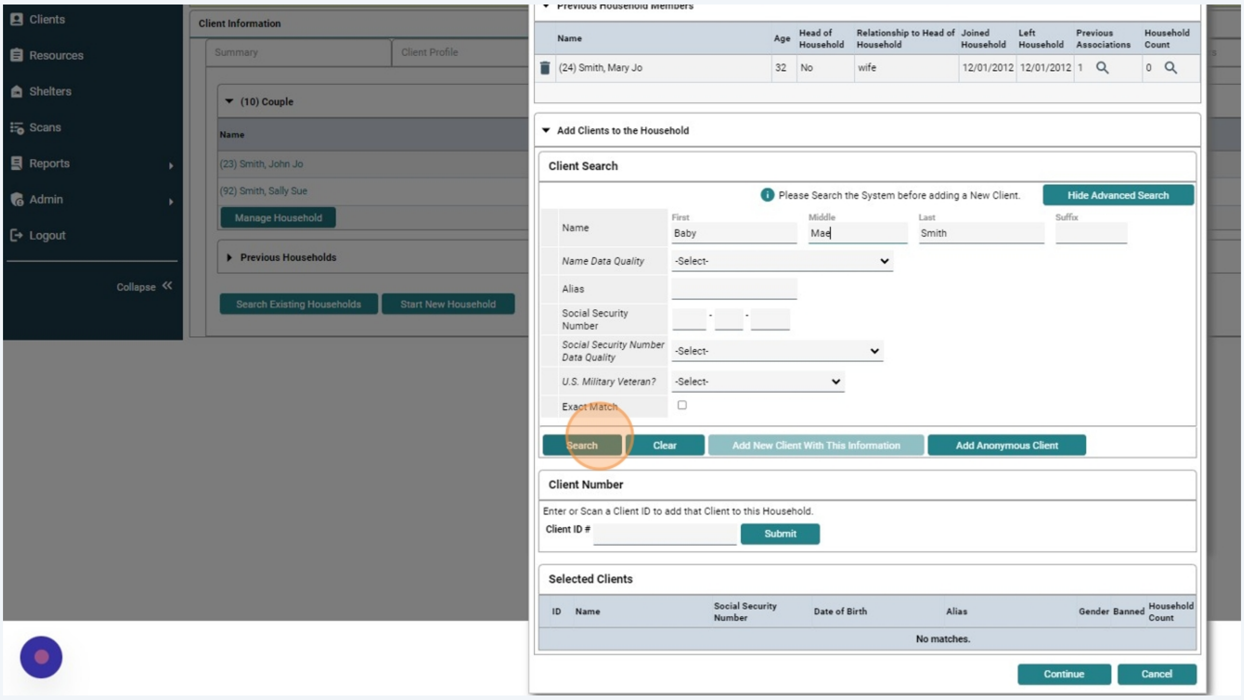


Note- KYHMIS 102 is "KYHMIS Workflow- Creating a Client & Household"

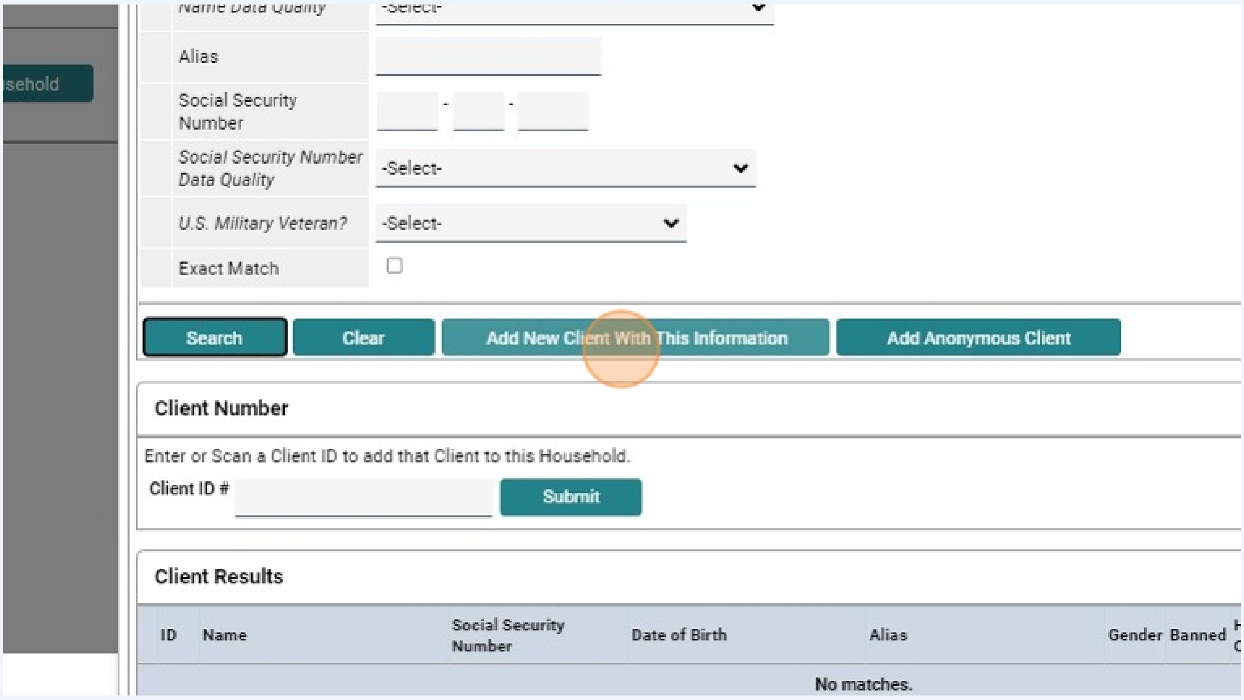
45 Follow the same steps as in KYHMIS 102, and click "Add/Delete Household Members" to add the new person to the household.



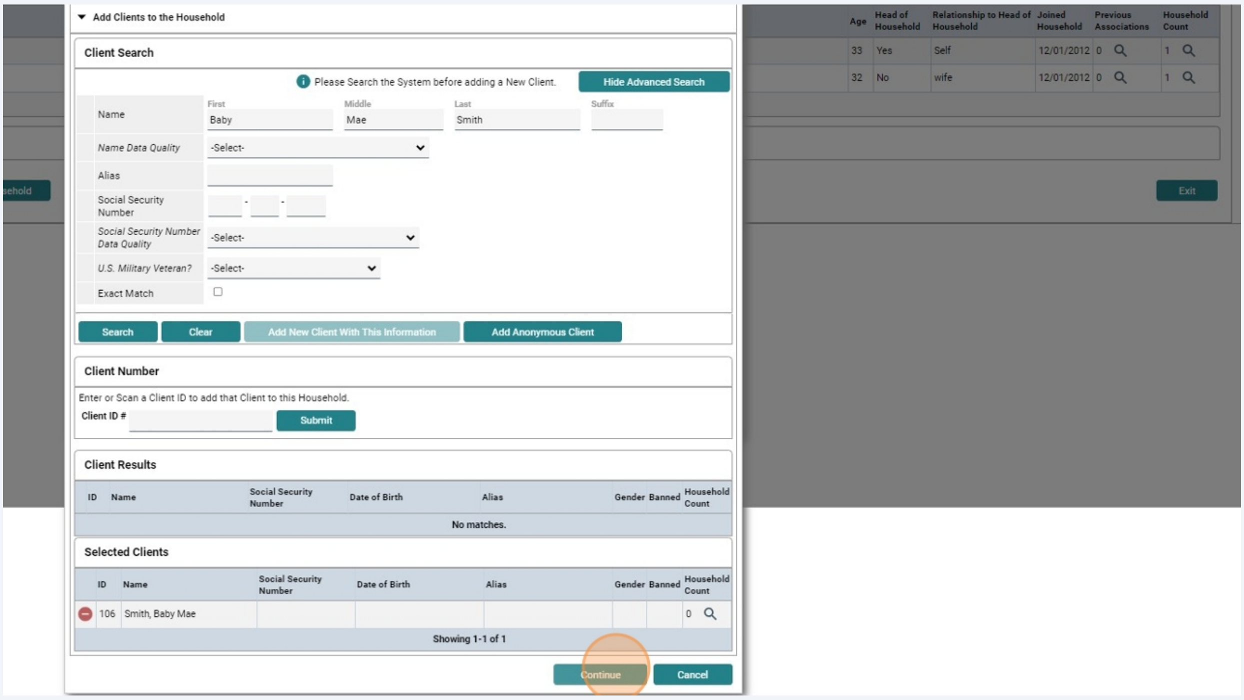
46 First, click "Search" to see if the new client (baby in this case) is already in the System.



47 If they are not, then click "Add New Client With This Information".

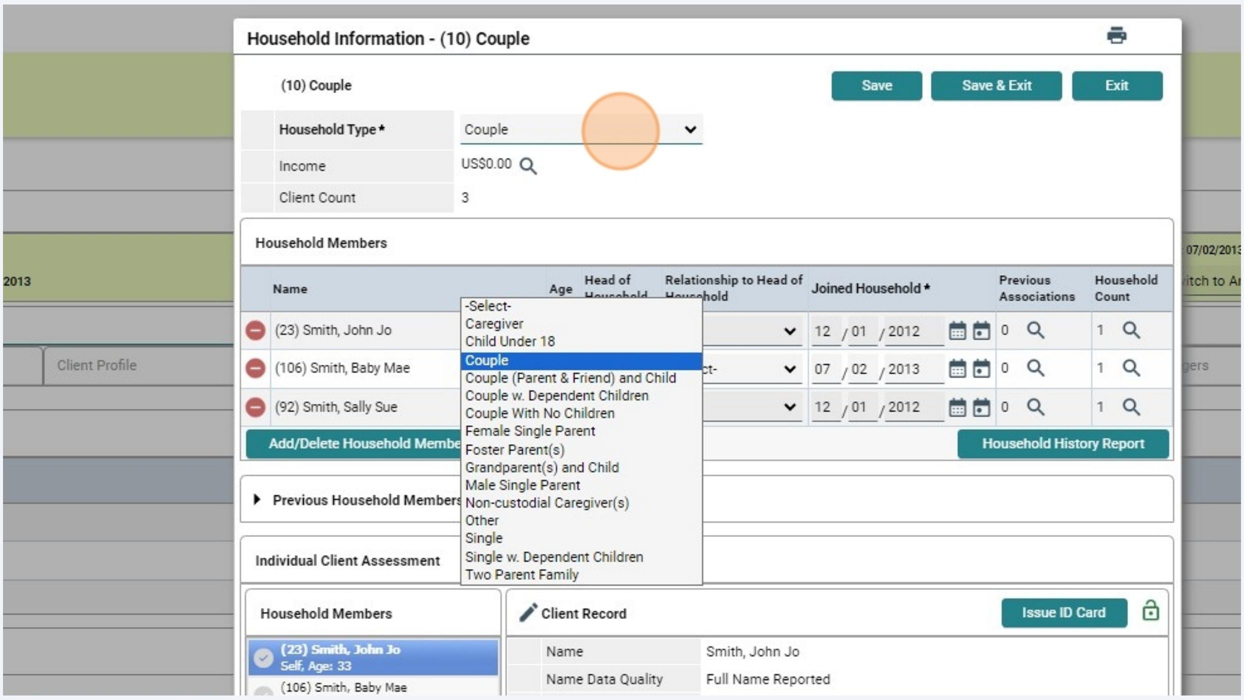


48 Once you have your new client selected at the bottom of the screen, click "Continue".

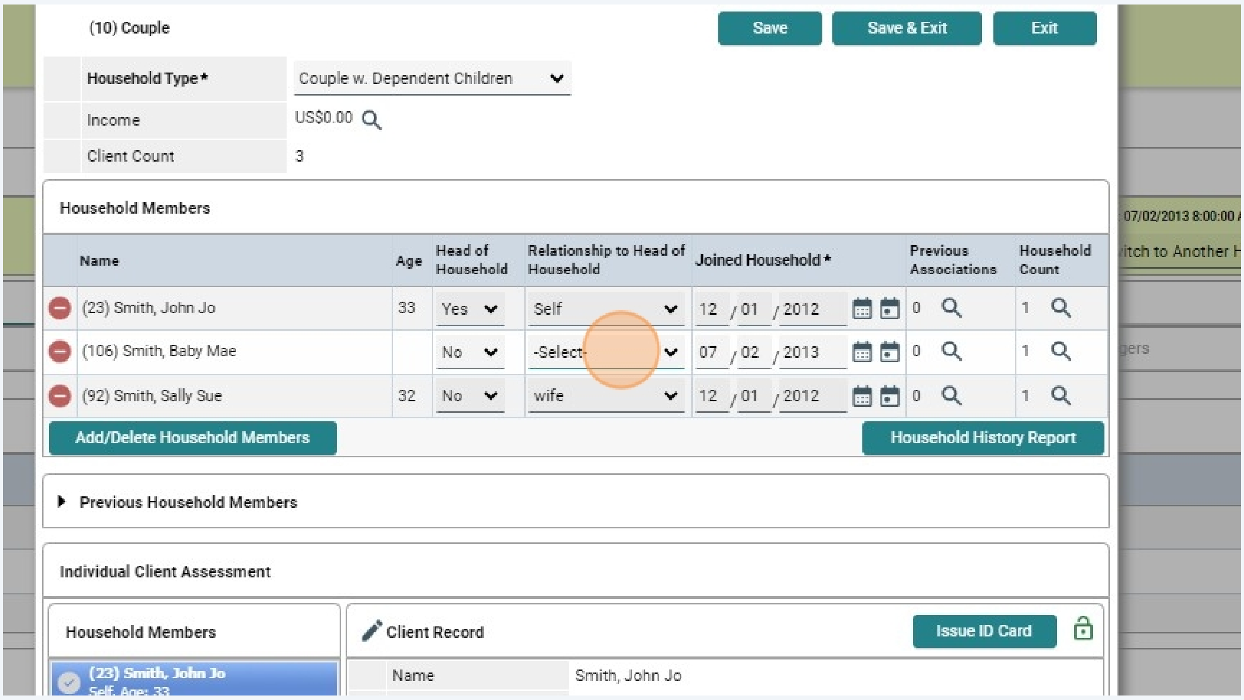


49 Review the "Household Type" to see if it needs to be updated.

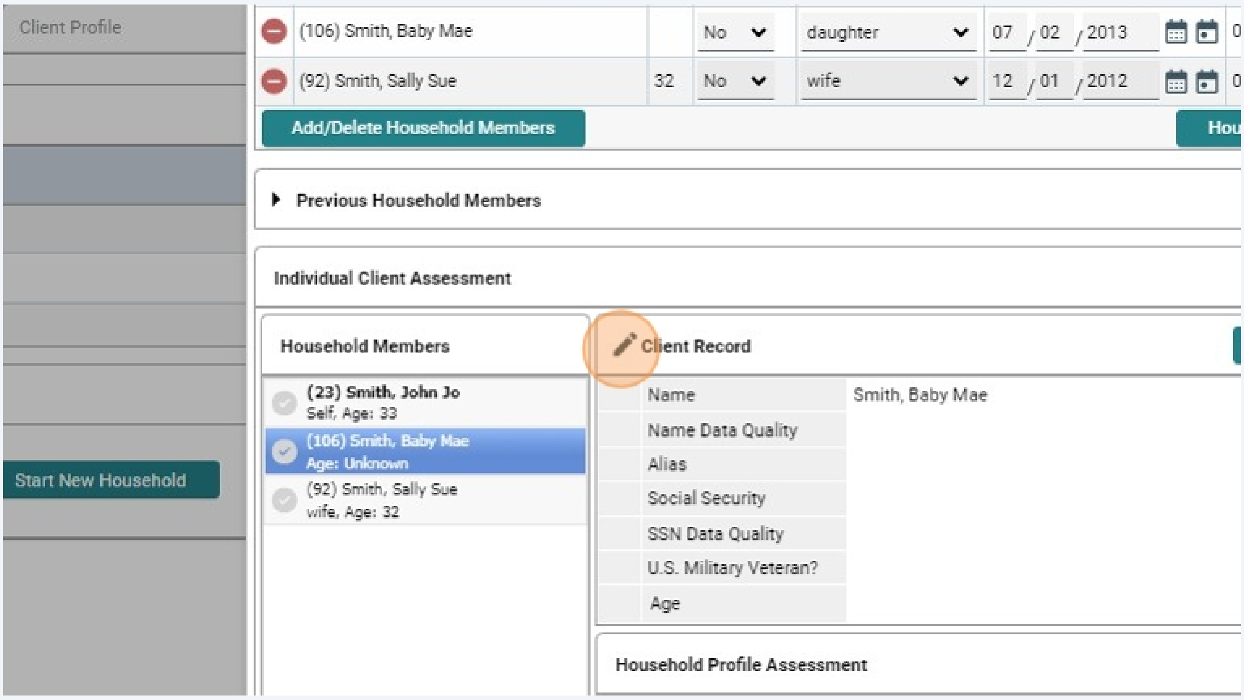
In this case we changed "Couple" to "Couple w. Dependent Children".



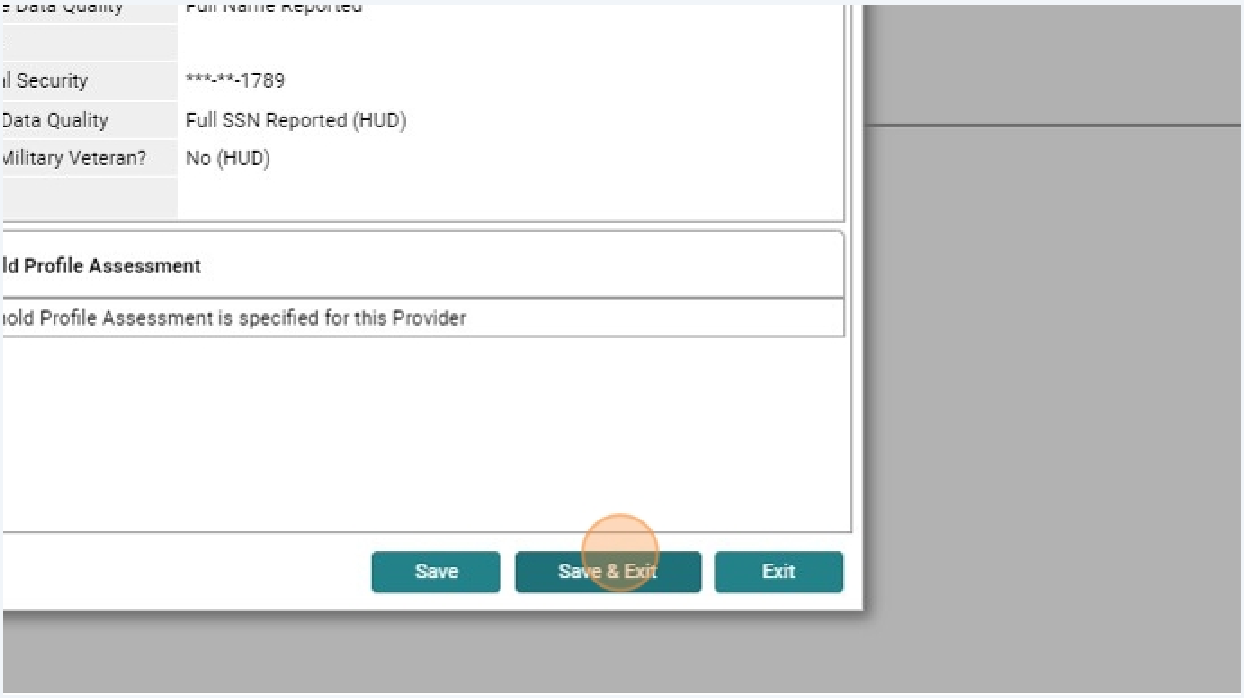
50 Make sure that you set the new client's "Relationship to Head of Household" and confirm their "Joined Household" date is correct.



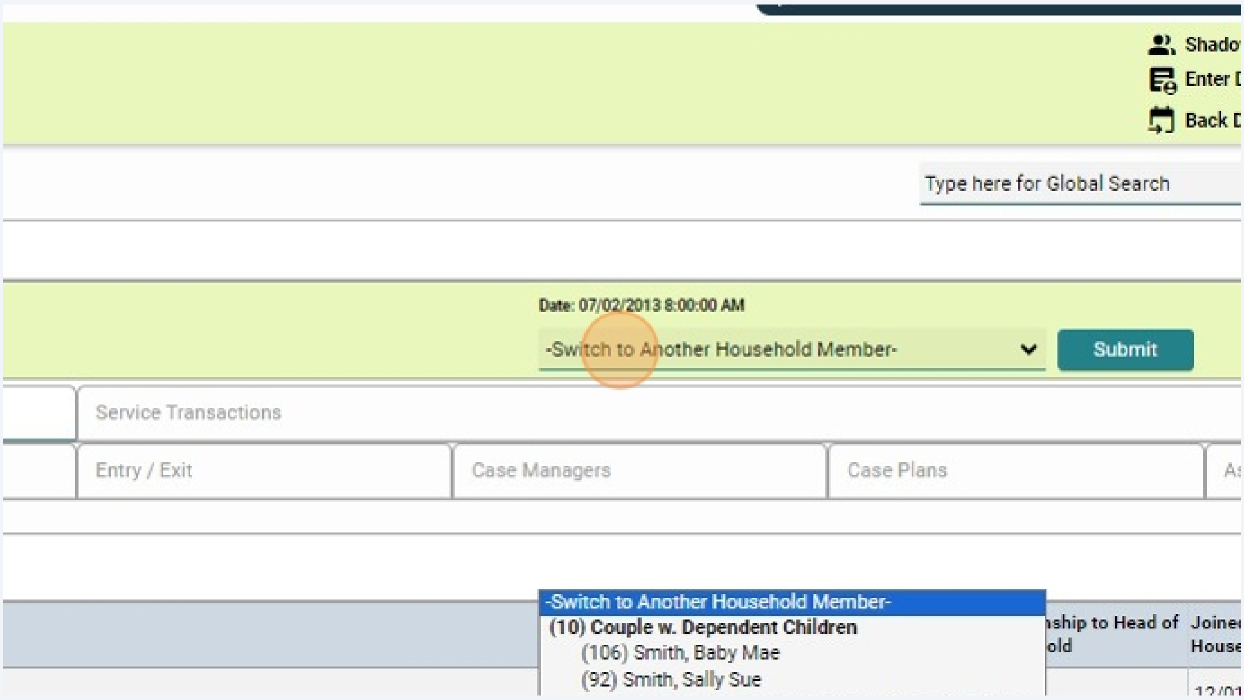
51 Click on the pencil next to "Client Record" and fill in the information.



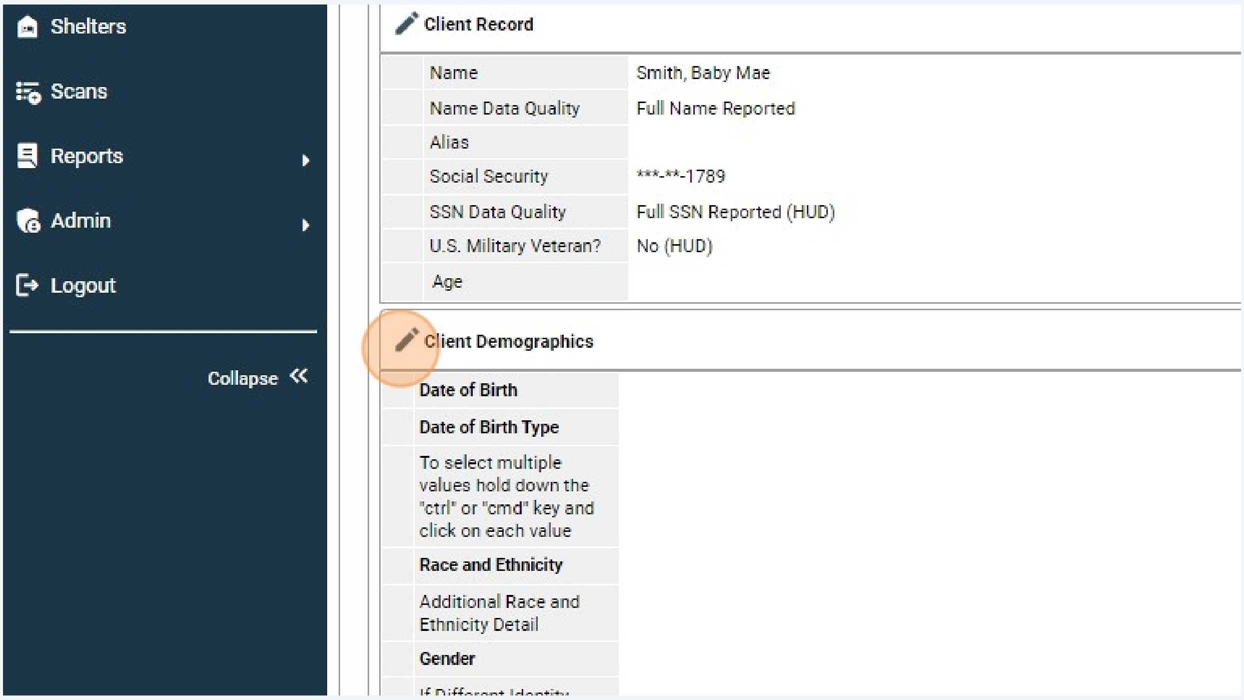
52 Then click "Save & Exit".



53 If your new client was not already in the System, then you will need to utilize the "Switch to Another Household Member" feature to switch to the client's Record and fill in just their "Client Profile" tab.



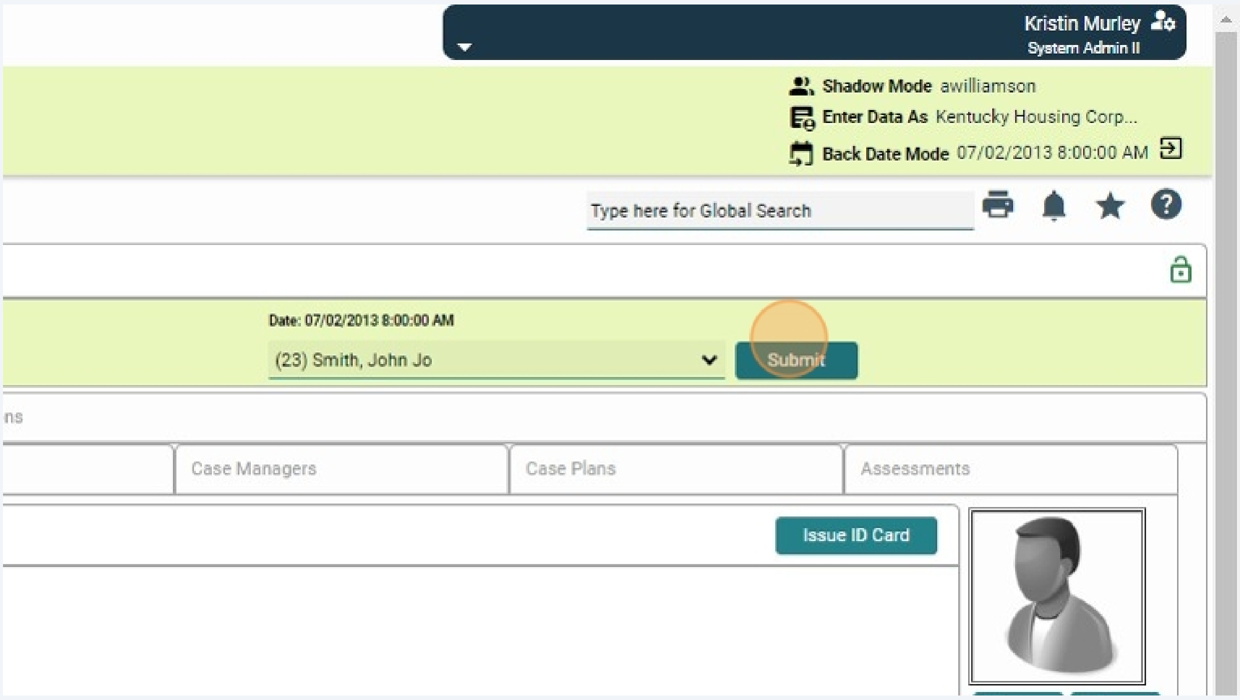
54 Fill out the new client's information by clicking the pencil next to "Client Demographics".



55

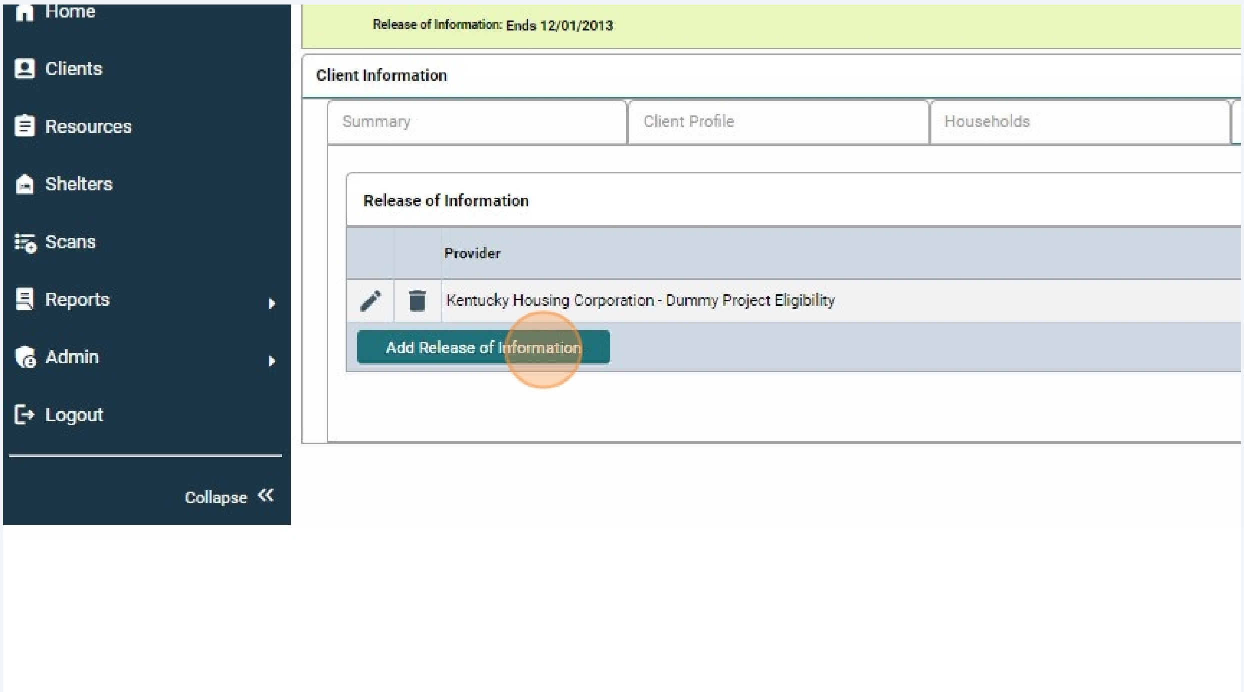
IMPORTANT: when you are done filling in the new client's "Profile" information, make sure that you "Switch Back" to the Head of Household/HoH's Client Record.

You always want to work off of the HoH's record because there you can enter date for the **ENTIRE** household.

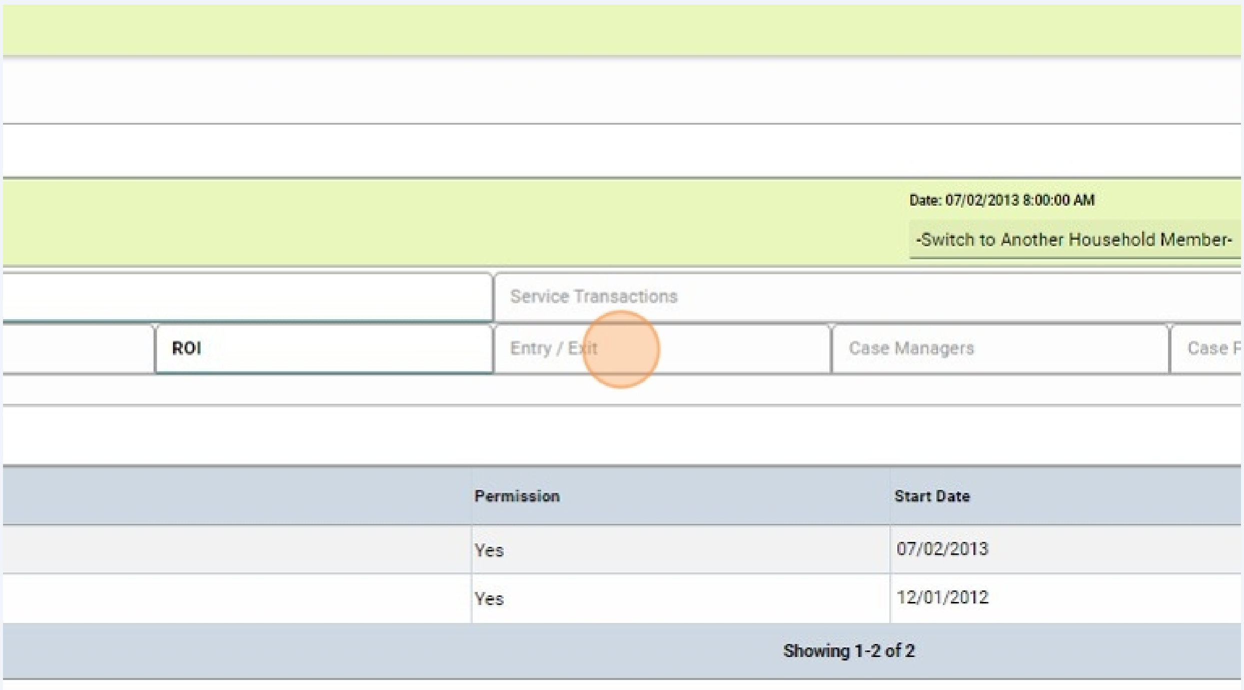


56 When someone new is added to the household, you **MUST** record a new ROI that covers the entire household on the HoH's "ROI" tab.

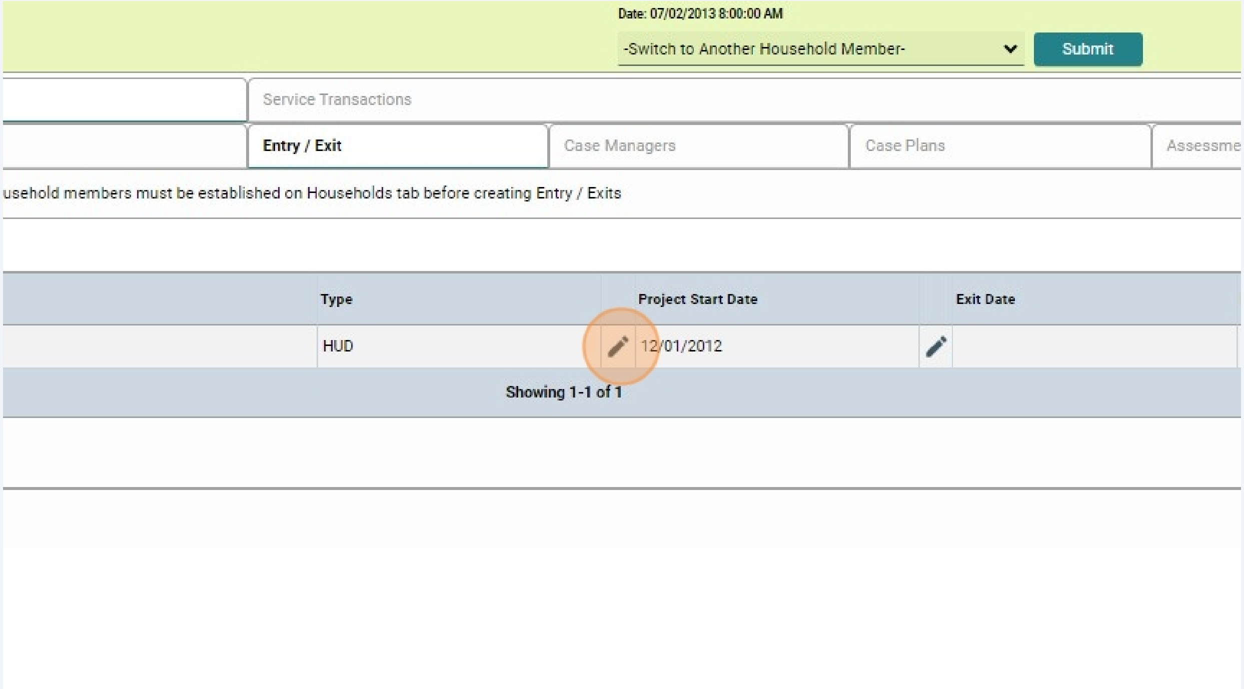
Click "Add Release of Information".



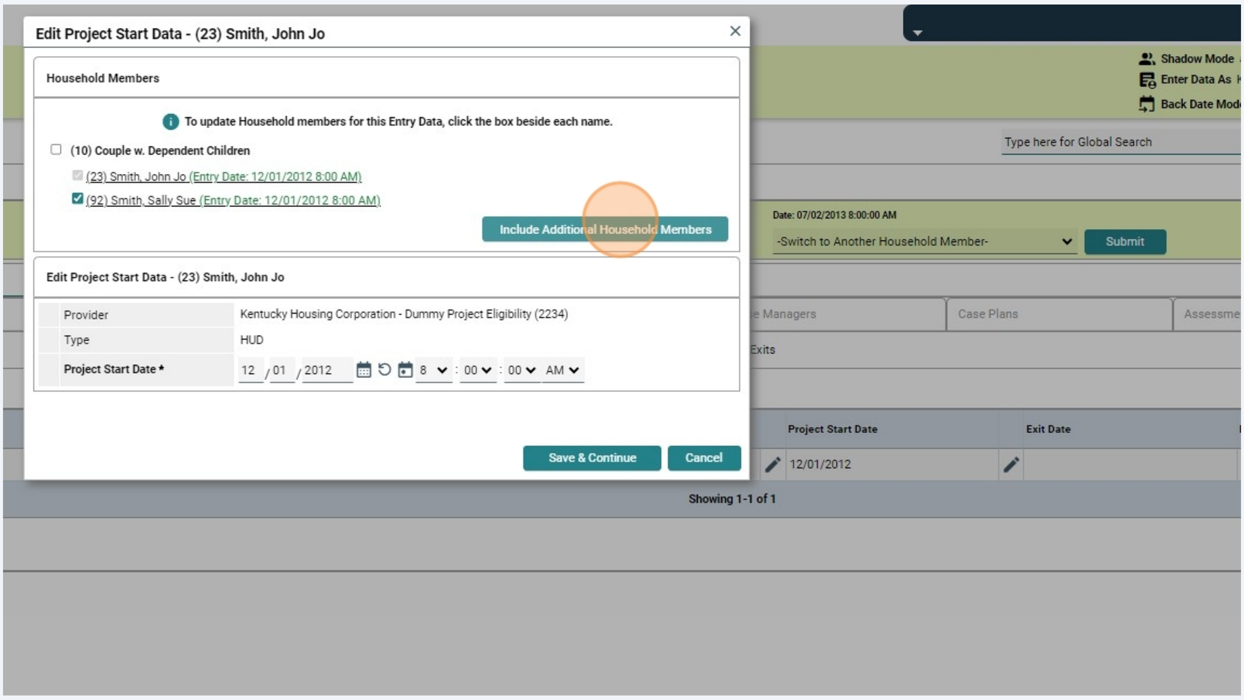
57 Click the "Entry / Exit" tab.



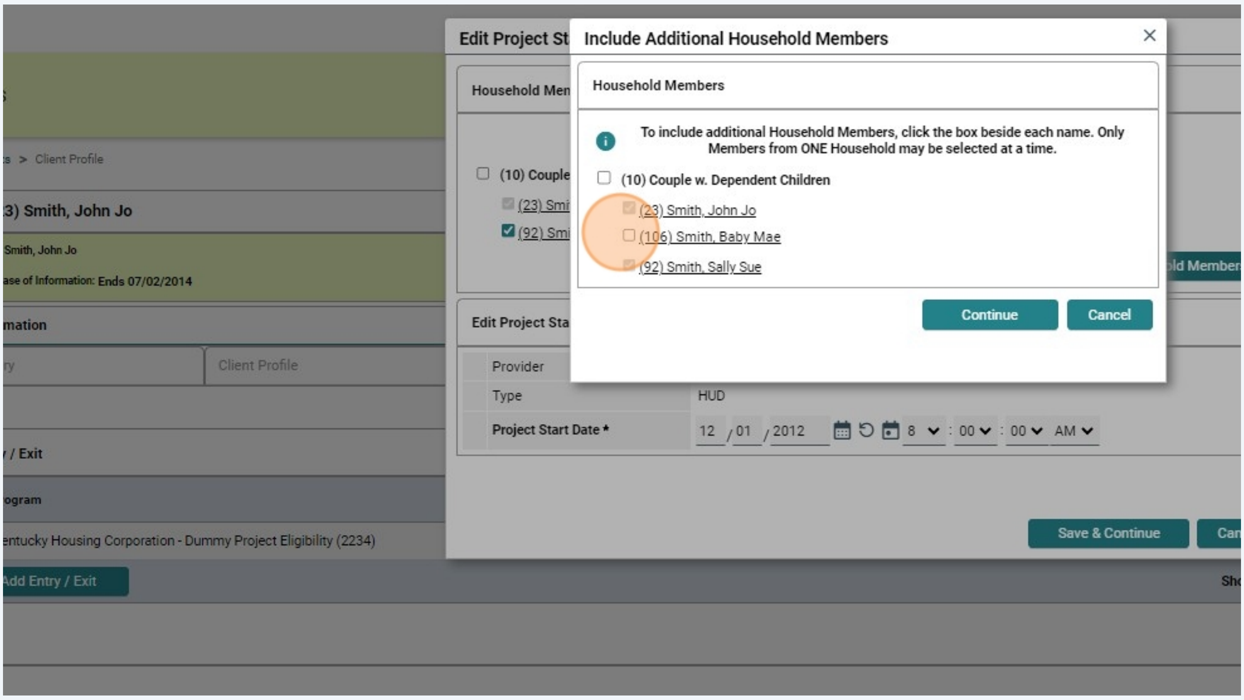
58 Click the pencil next to the Project Entry date.



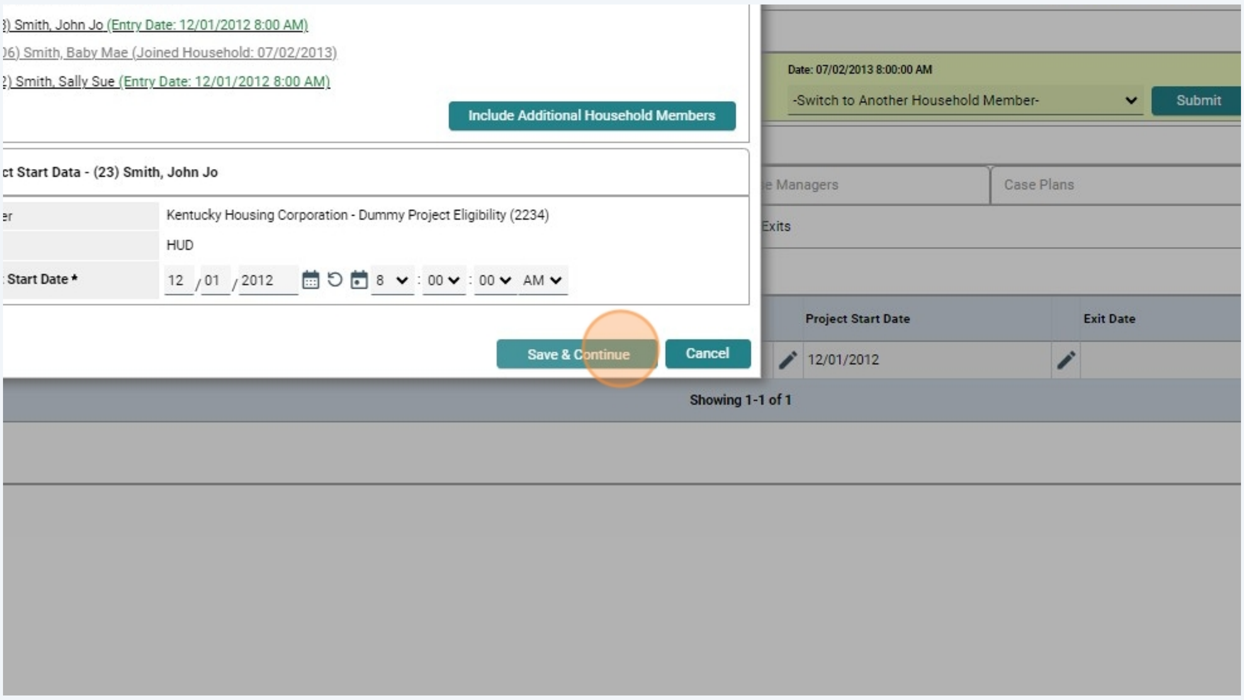
59 Click "Include Additional Household Members".



60 Click the additional household member(s) that you want to add to the Project.



61 Then, click "Save & Continue".

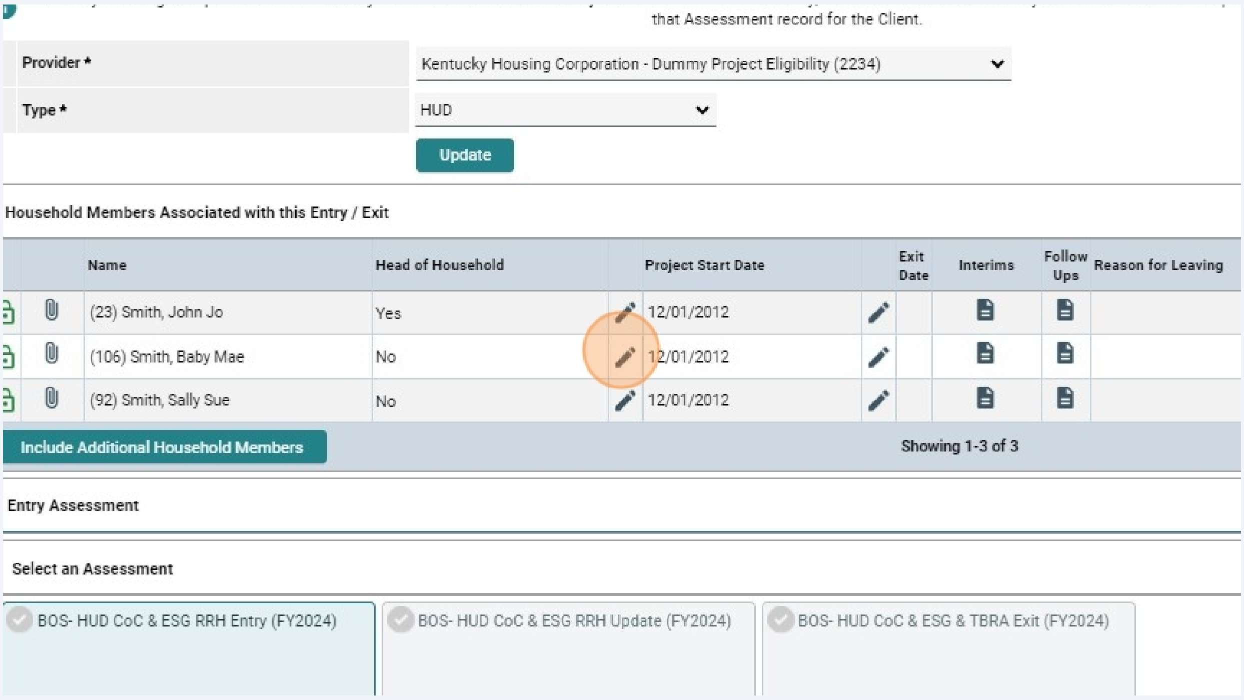


⚠ **Alert!**

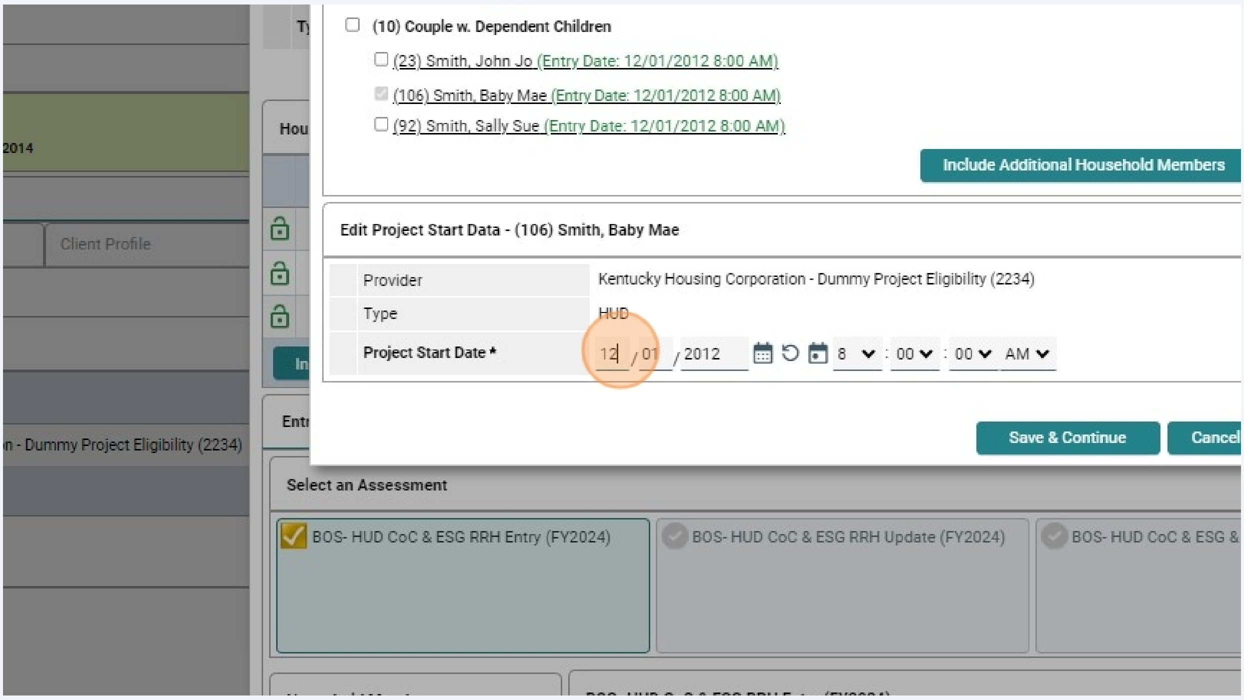
When adding a baby to the household, their Entry date **CANNOT** *be the same as their Date of Birth. Use a date a couple of days later.*

62 When adding a new household member at a later date, you will need to edit the Project Entry date to reflect the date the client entered the household.

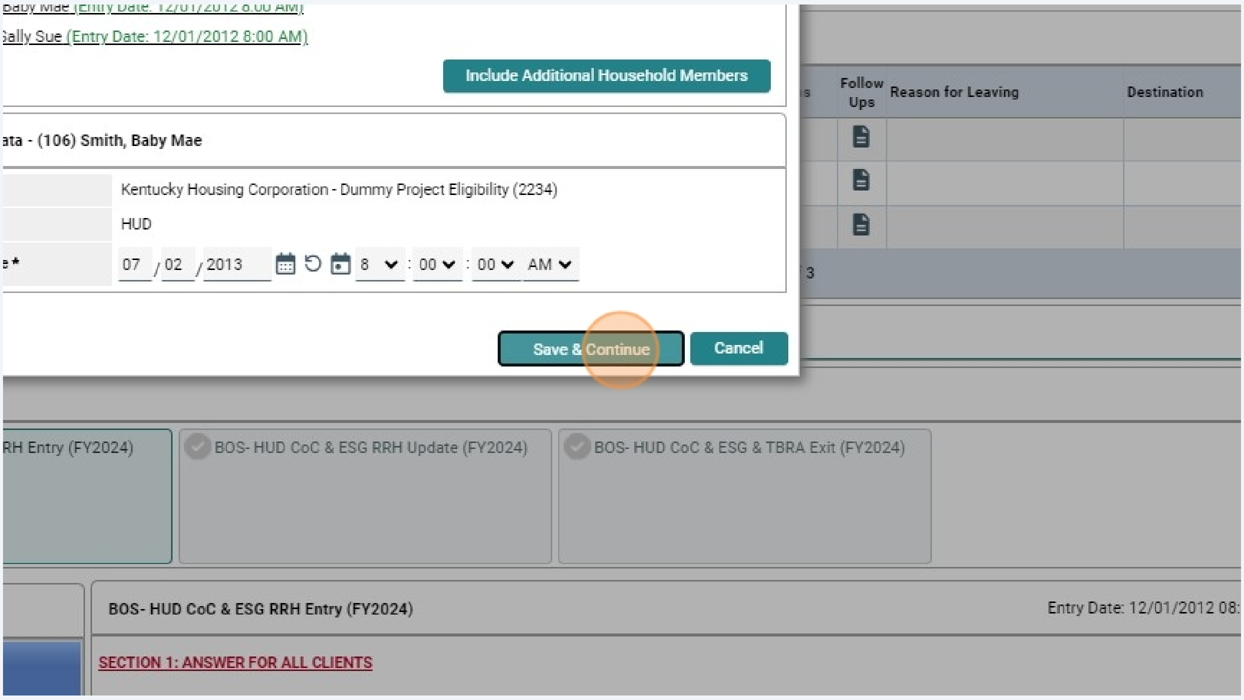
Click on the pencil to edit the date(s) as necessary.



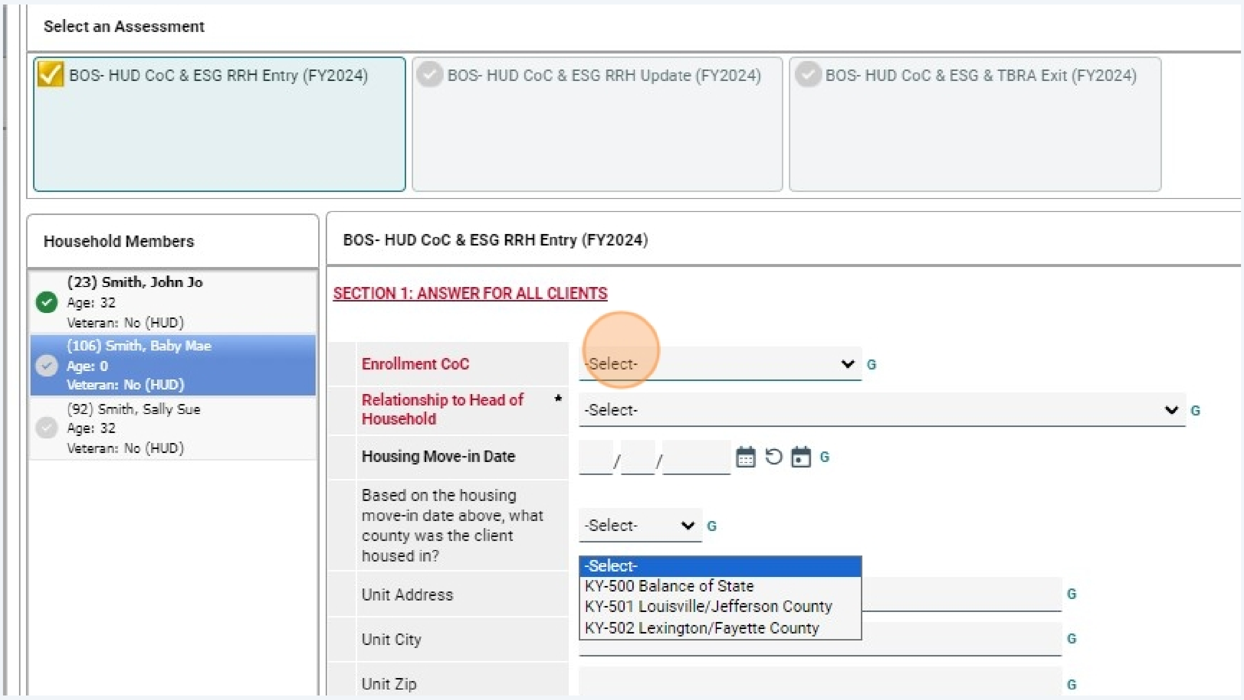
63 Uncheck the household members that the Entry date does **NOT** need to be updated for.



64 Click "Save & Continue".

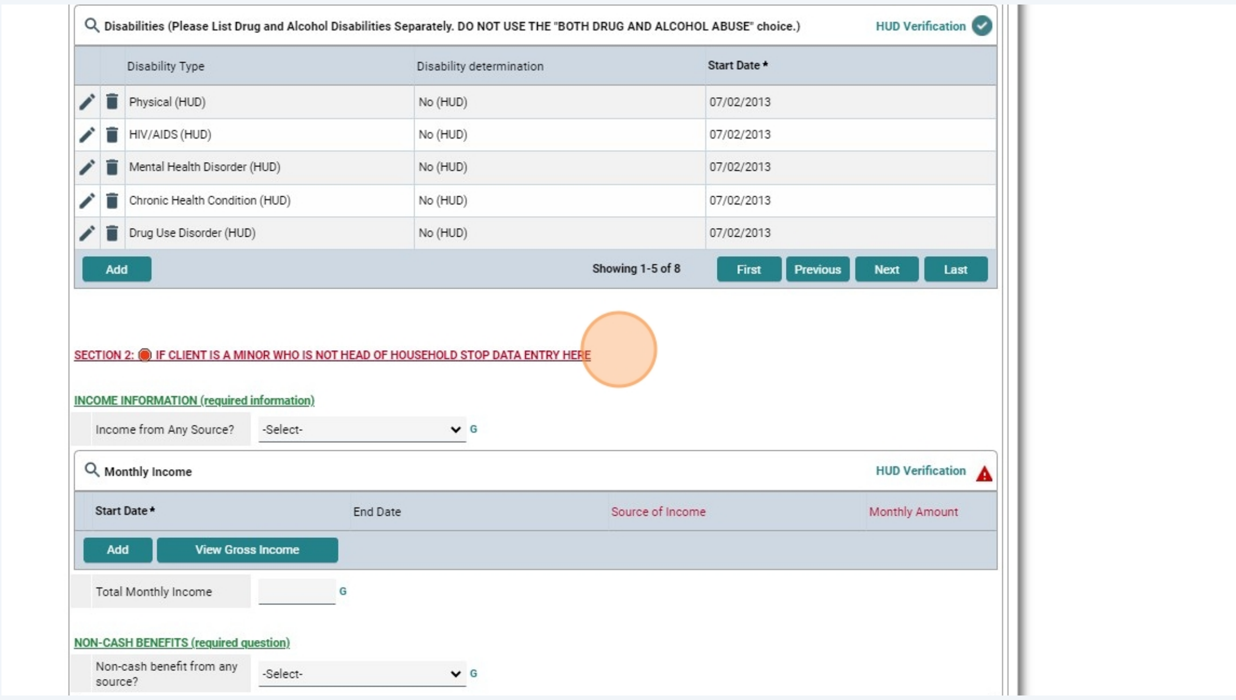


65 Utilize the "Household Members" menu on the left to click on the new household member(s) and update their Entry Assessment questions as usual.



66 When you get to the *"SECTION 2: IF CLIENT IS A MINOR WHO IS NOT HEAD OF HOUSEHOLD STOP DATA ENTRY HERE"* :

- you can stop answering the questions if the client you are entering data for is a child/minor.



67 Click "Save & Exit" when finished.

68 You can check the "Client Count" feature on the "Entry/Exit" tab to make sure that you have the correct clients associated with the Project Entry and that their start dates are correct.