

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

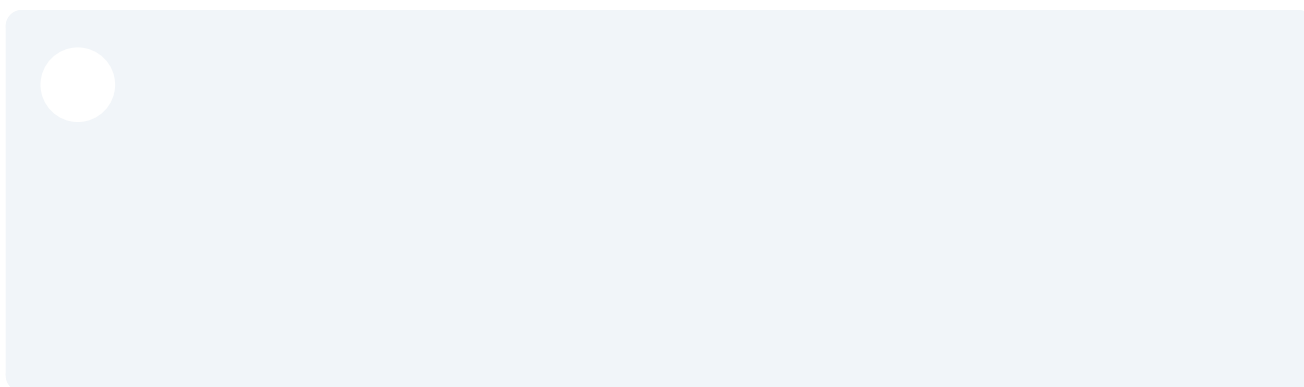
In this module, we will go over:

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.

The screenshot shows a web application interface for a client record. At the top, there is a green header bar with a search icon and the text "Type here for Global Search". Below this is a section with a date "Date: 12/01/2012 8:00:00 AM" and a button labeled "-Switch to Another Household Member-" with a dropdown arrow and a "Submit" button. Below this is a tabbed interface with tabs labeled "Service Transactions", "Entry / Exit", "Case Managers", and "Case Plans". The "Case Managers" tab is highlighted with an orange circle. Below the tabs is a table with columns: "Age", "Head of Household", "Relationship to Head of Household", and "Jo". The table contains two rows of data:

Age	Head of Household	Relationship to Head of Household	Jo
32	Yes	Self	12
32	No	wife	12

3

Click "Add Case Manager".

The screenshot shows a web application interface for a client profile. The header bar is green and contains the text "Kentucky Housing Corporation - BOS" and "September 20, 2024". On the right, there is a "Show Mode" dropdown, "Enter Data As" dropdown, and "Back Date Mode" dropdown. Below the header is a sidebar with a dark blue background and white text, containing links: "Last Viewed", "Favorites", "Home", "Clients", "Resources", "Shelters", "Scans", "Reports", "Admin", and "Logout". The main content area is titled "Client - (263826) Kitty, Hello" and includes a "Date: 09/01/2024 8:00:00 AM" and a button labeled "-Switch to Another Household Member-" with a dropdown arrow and a "Submit" button. Below this is a tabbed interface with tabs labeled "Summary", "Client Profile", "Households", "ROI", "Entry / Exit", "Case Managers", and "Case Plans". The "Case Managers" tab is highlighted. Below the tabs is a section titled "Case Managers" with a table containing columns: "Name", "Provider", "Phone Number", "Start Date", and "End Date". The table contains four rows of data:

Name	Provider	Phone Number	Start Date	End Date
Margaret Ann (test) Smith	Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS		08/07/2024	
Kim Webb	ZZZ-INACTIVE 10/1/2021-Franklin County Women and Family Shelter-OTH-ES-BOS	(502) 352-2843	08/14/2018	
Kenzie Strubank	ZZZ-INACTIVE 10/31/2020-Bluegrass LPC Coordinated Entry-OTH-BOS	502-223-1834 x 1119	06/20/2018	
Sam Chanda Young	Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS		07/15/2024	07/15/2024

Below the table is a button labeled "Add Case Manager" and the text "Showing 1-4 of 4".

4 Select the appropriate household members.

file

John Jo

None

Client Profile

Household Members

Case Manager - (23) Smith, John Jo

▼ Household Members

i To include Household members for this Case Manager, click the box beside each member from the SAME Household may be selected.

☒ (10) Couple

☐ (23) Smith, John Jo

☒ (24) Smith, Mary Jo

☒ (92) Smith, Sally Sue

Type * ☒ Community Services User ☐ Me ☐ Other

Select User * Kentucky Housing Corporation - BOS (39) Search My P

-Select-

Name *

Title

Phone Number

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

Household Members

To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.

☒ (10) Couple

☐ (23) Smith, John Jo

☒ (24) Smith, Mary Jo

☐ (92) Smith, Sally Sue

Case Manager Selection

☐ Community Services User ☒ Me ☐ Other

Name * Kristin Murley

Title

Phone Number

Email Address kmurley@kyhousing.org

Provider * Kentucky Housing Corporation - BOS (39) **Search** **My Provider** **Clear**

Start Date * 12 / 01 / 2012

End Date

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

☐ (92) Smith, Sally Sue

Type * ☐ Community Services User ☒ Me ☐ Other

Name * Kristin Murley

Title

Phone Number

Email Address kmurley@kyhousing.org

Provider * Kentucky Housing Corporation - BOS (39)

Start Date * 12 / 01 / 2012

End Date

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

Title

Phone Number

Email Address kmurley@kyhousing.org

Provider * Kentucky Housing Corporation - Dummy Project Eligibility (2234)

Start Date * 12 / 01 / 2012

End Date 12 / 01 / 2012

Case Plans

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

The screenshot shows a web application interface for a client record. At the top, there is a green header bar with the text "Connect To BusinessObjects". Below this is a search bar with the placeholder text "Type here for Global Search" and several icons (print, notifications, star, question mark). A date field shows "Date: 12/01/2012 8:00:00 AM". Below the date is a dropdown menu with the text "-Switch to Another Household Member-" and a "Submit" button. The main content area has three tabs: "Case Managers", "Case Plans" (highlighted with an orange circle), and "Assessments". Below the tabs is a table with columns "Phone Number", "Start Date", and "End Date". The table contains one row with the values "12/01/2012" and "12/01/2012". Below the table is a status bar that says "Showing 1-1 of 1". At the bottom right is an "Exit" button.

- 9 Click "Add Goal".

The screenshot shows a web application interface for a client record. On the left is a dark blue sidebar with a list of navigation items: Home, Clients, Resources, Shelters, Scans, Reports, Admin, and Logout. The main content area has a green header bar with the text "Release of Information: None". Below this is a section titled "Client Information" with three tabs: "Summary", "Client Profile", and "Households". The "Client Profile" tab is selected. Below the tabs is a section titled "Goals" with a table that has columns "Classification" and "Type". The table contains one row with the text "Add Goal" (highlighted with an orange circle). Below the "Goals" section is a section titled "Case Plans File Attachments" with a table that has a column "Date Added". Below the table is a button labeled "Add New File Attachment". At the bottom is a button labeled "Print Case Plan".



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.

Goal

Goal - (23) Smith, John Jo

▼ Household Members

To include Household members for this Goal, click the box beside each name. C Household may be selected.

☐ (10) Couple

☒ (23) Smith, John Jo

☐ (24) Smith, Mary Jo

☐ (92) Smith, Sally Sue

Provider * Kentucky Housing Corporation - BOS (39) **Search**

Case Manager -Select- ▼

Date Goal was Set * 12 / 01 / 2012

Classification * -Select- ▼

Type * -Select- ▼

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.*

The screenshot shows a web application interface with a dark sidebar on the left containing navigation links: Home, Clients, Resources, Shelters, Scans, Reports, Admin, and Logout. The main content area displays a form for selecting a Case Manager. The form includes fields for Provider, Case Manager, Date Goal was Set, Classification, Type, Goal Description, Target Date, Overall Status, and Projected Follow Up Date. The 'Case Manager' dropdown is open, showing a list of names: Kenzie Strubank, Kim Webb, Margaret Ann (test) Smith, and Sam Chanda Young. An orange circle highlights the dropdown menu.

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

Enter the "Goal Description".

The screenshot shows the same web application interface as in the previous step. The 'Classification' dropdown is open, showing a list of categories: Economic, Education, Employment, Environment and safety, Financial Stability, Health, Health Improvement, Household necessities, Housing, Interpersonal Relationships, Legal, Mental Health Treatment, and Notes not associated with a goal. An orange circle highlights the dropdown menu.

13 Select the "Target Date".

Select the "Overall Status".

The screenshot shows a web form for creating a goal. The form is divided into several sections. The top section includes fields for Provider (Kentucky Housing Corporation - Dummy Project Eligibility (2234)), Case Manager (*Kristin Murley*), Date Goal was Set (12 / 01 / 2012), Classification (Housing), and Type (Move to Permanent Housing). Below these is a large text area for Goal Description. The next section contains Target Date (01 / 01 / 2014), Overall Status (highlighted with an orange circle), If Closed, Outcome (-Select-), and If Partially Complete, Percent Complete (-Select-). The bottom section includes Projected Follow Up Date, Follow Up User (Kentucky Housing Corporation - BOS (39)), Follow Up Made (-Select-), Completed Follow Up Date, and Outcome at Follow Up (-Select-). The form also features search and clear buttons for the Provider and Follow Up User fields.



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".

Goal Description

Target Date 01 / 01 / 2014

Overall Status * In Progress

If Closed, Outcome -Select-

If Partially Complete, Percent Complete -Select-

Projected Follow Up Date

Follow Up User Kentucky Housing Corporation - BOS (39) Search My Provider Clear

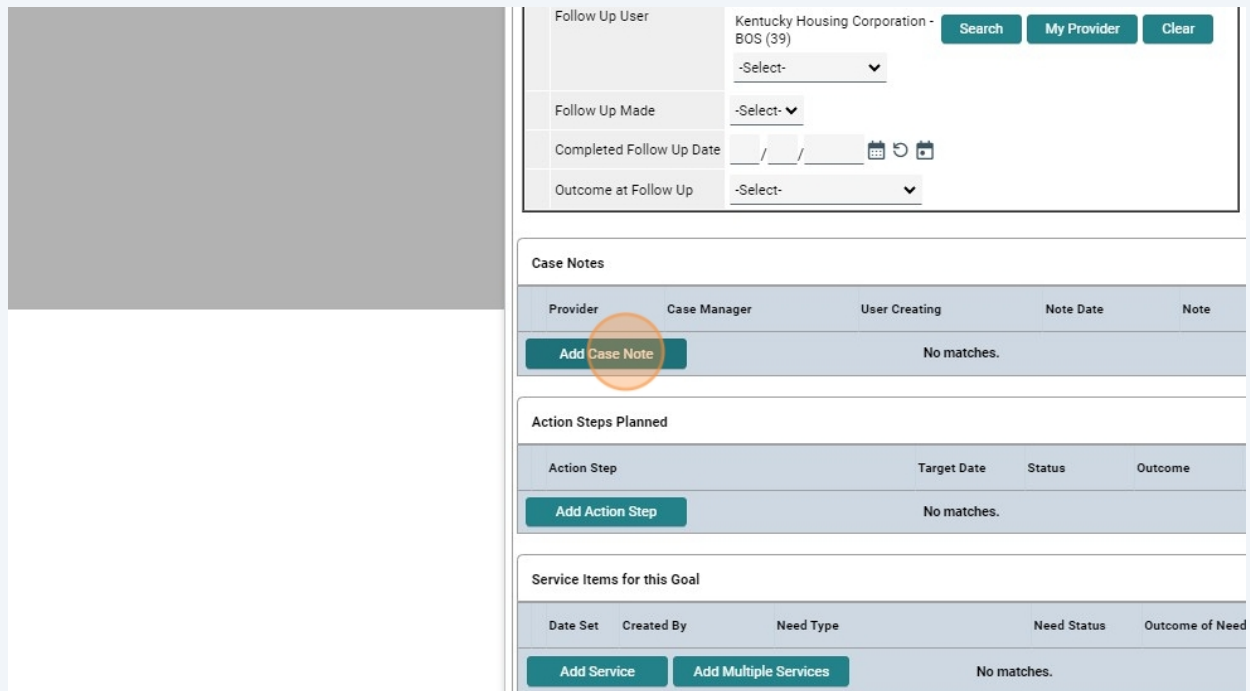
Follow Up Made -Select-

Completed Follow Up Date

Outcome at Follow Up -Select-

Add Goal Cancel

15 Click "Add Case Note".



The screenshot displays a web application interface for case management. On the left is a large grey rectangular area. To its right is a form with several sections:

- Follow Up User:** A dropdown menu showing "Kentucky Housing Corporation - BOS (39)" with a search icon and buttons for "Search", "My Provider", and "Clear". Below it is a "-Select-" dropdown.
- Follow Up Made:** A "-Select-" dropdown.
- Completed Follow Up Date:** A date picker with a calendar icon and a refresh icon.
- Outcome at Follow Up:** A "-Select-" dropdown.

Below these fields are three tables, each with a header row and a data row containing a button and the text "No matches."

- Case Notes:** The header row includes "Provider", "Case Manager", "User Creating", "Note Date", and "Note". The data row contains the "Add Case Note" button (highlighted with an orange circle) and "No matches."
- Action Steps Planned:** The header row includes "Action Step", "Target Date", "Status", and "Outcome". The data row contains the "Add Action Step" button and "No matches."
- Service Items for this Goal:** The header row includes "Date Set", "Created By", "Need Type", "Need Status", and "Outcome of Need". The data row contains the "Add Service" and "Add Multiple Services" buttons, followed by "No matches."

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).

Case Note

Case Note - (23) Smith, John Jo

▼ Household Members

To include Household members for this Case Note, click the box beside each name. Only members from the SAME Household may be selected.

☐ (10) Couple

☒ (23) Smith, John Jo

☒ (24) Smith, Mary Jo

Provider * Kentucky Housing Corporation - Dummy Project Eligibility (2234) Search My Provider Clear

Case Manager -Select- ▼

Note Date * 12 / 01 / 2012

Note *

-Select-
Kristin Murley

Save Case Note Cancel

Provider Case Manager User Creating Note Date Note

18 Click "Save Case Note" when finished.

Case Note

Case Note - (263826) Kitty, Hello

▼ Household Members

No Household Members were originally associated.

Provider * Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) ▼

Case Manager Margaret Ann (test) Smith ▼

Note Date * 09 / 10 / 2024

Note *

Met with client today to fill out their Case Plan and major goals. Client would like to focus on obtaining PSH and maintaining stable housing. Worked with the client on searching for available housing options.

Save Case Note Cancel

Date Set Created By Need Type Need Status Outcome of Need

Add Service Add Multiple Services No matches.

Print Save Goal Save & Exit Exit

19 Add Action Plan.

Click "Add Action Step" field.

The screenshot shows a web interface for adding a case note. At the top, there's a header bar with a pencil icon, a trash icon, and the text 'Kentucky Housing Corporation - Dummy Project Eligibility'. Below this is a table with columns for 'Case Manager', 'Case Creating', and 'No'. The first row shows 'Kristin Murley' in both the 'Case Manager' and 'Case Creating' columns, and '12' in the 'No' column. Below the table is a button labeled 'Add Case Note' and a status indicator 'Showing 1-1 of 1'. The main section is titled 'Action Steps Planned' and contains a table with columns 'Action Step', 'Target Date', and 'Status'. Below the table is a button labeled 'Add Action Step', which is highlighted with an orange circle. Below this is a section titled 'Service Items for this Goal' with a table containing columns 'Date Set', 'Created By', 'Need Type', and 'Need'. Below the table are two buttons: 'Add Service' and 'Add Multiple Services'. At the bottom of the form are three buttons: 'Print', 'Save Goal', and 'Save'.

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

The screenshot shows a web interface for adding a case note. At the top, there's a header bar with a checkmark icon and the text '(24) Smith, Mary Jo'. Below this is a table with columns for 'Provider', 'Date Action Step was set', 'Action Step', 'Target Date', 'Overall Status', and 'If Closed, Outcome'. The first row shows 'Kentucky Housing Corporation - Dummy Project Eligibility (2234)' in the 'Provider' column, '12 / 01 / 2012' in the 'Date Action Step was set' column, 'apply for available apartments' in the 'Action Step' column, and empty fields in the 'Target Date', 'Overall Status', and 'If Closed, Outcome' columns. The 'Action Step' field is highlighted with an orange circle. Below the table are two buttons: 'Add Service' and 'Add Multiple Services'. At the bottom of the form are three buttons: 'Print', 'Save Goal', and 'Save'.

21 Click "Save Action Step" when finished.

SAME Household may be selected.

☐ (10) Couple
☐ (23) Smith, John Jo
☒ (24) Smith, Mary Jo

Provider * Kentucky Housing Corporation - Dummy Project Eligibility (2234) Search My Provider Clear

Date Action Step was set 12 / 01 / 2012 📅 🕒

Action Step * apply for available apartments

Target Date 01 / 01 / 2013 📅 🕒

Overall Status * In Progress ▼

If Closed, Outcome -Select- 📅 🕒

Projected Follow Up Date 📅 🕒

Follow Up User Kentucky Housing Corporation - BOS (39) Search My Provider Clear

Follow Up Made -Select- ▼

Completed Follow Up Date 📅 🕒

Outcome at Follow Up -Select- ▼

Save Action Step Cancel

Service Items for this Goal

Date Set	Created By	Need Type	Need Status	Outcome of Need
No matches.				

Add Service Add Multiple Services

Print Save Goal Save & Exit Exit

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

Provider	Case Manager	User Creation
Kentucky Housing Corporation - Dummy Project Eligibility	Kristin Murley	Kristin Murley

Add Case Note Showing 1-1 of 1

Action Steps Planned

Action Step	Target Date	Status
apply for available apartments	01/01/2013	In Progress

Add Action Step Showing 1-1 of 1

Service Items for this Goal

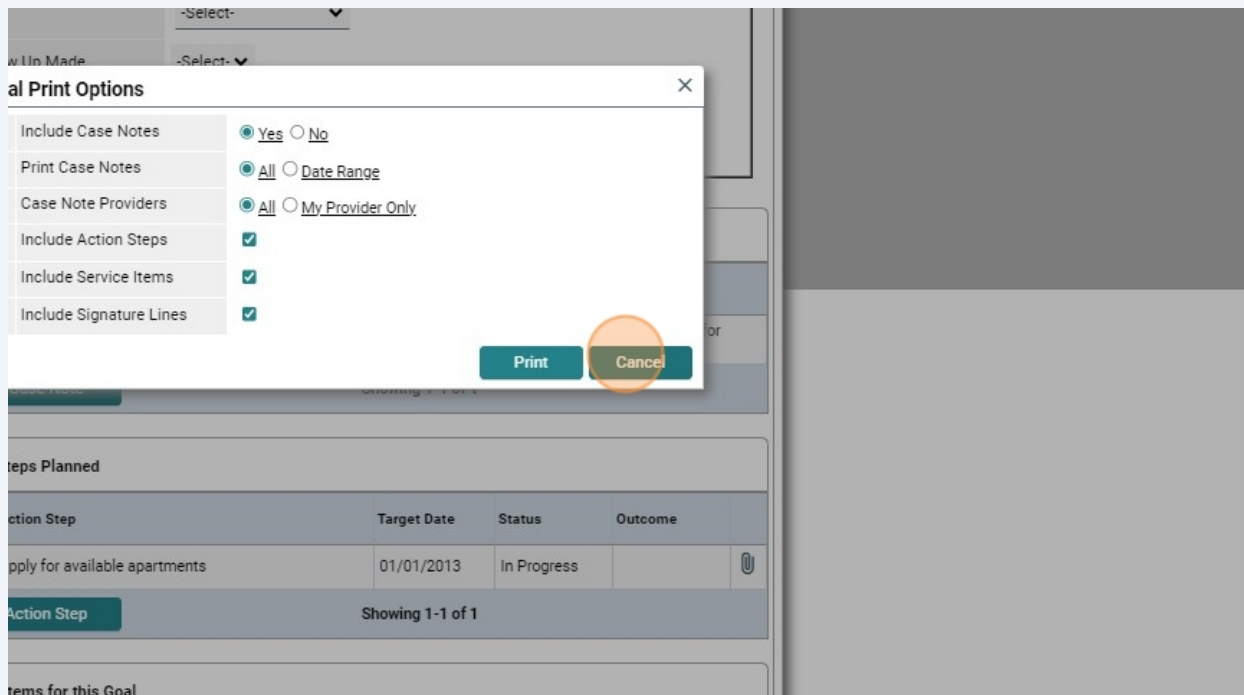
Date Set	Created By	Need Type
No matches.		

Add Service Add Multiple Services

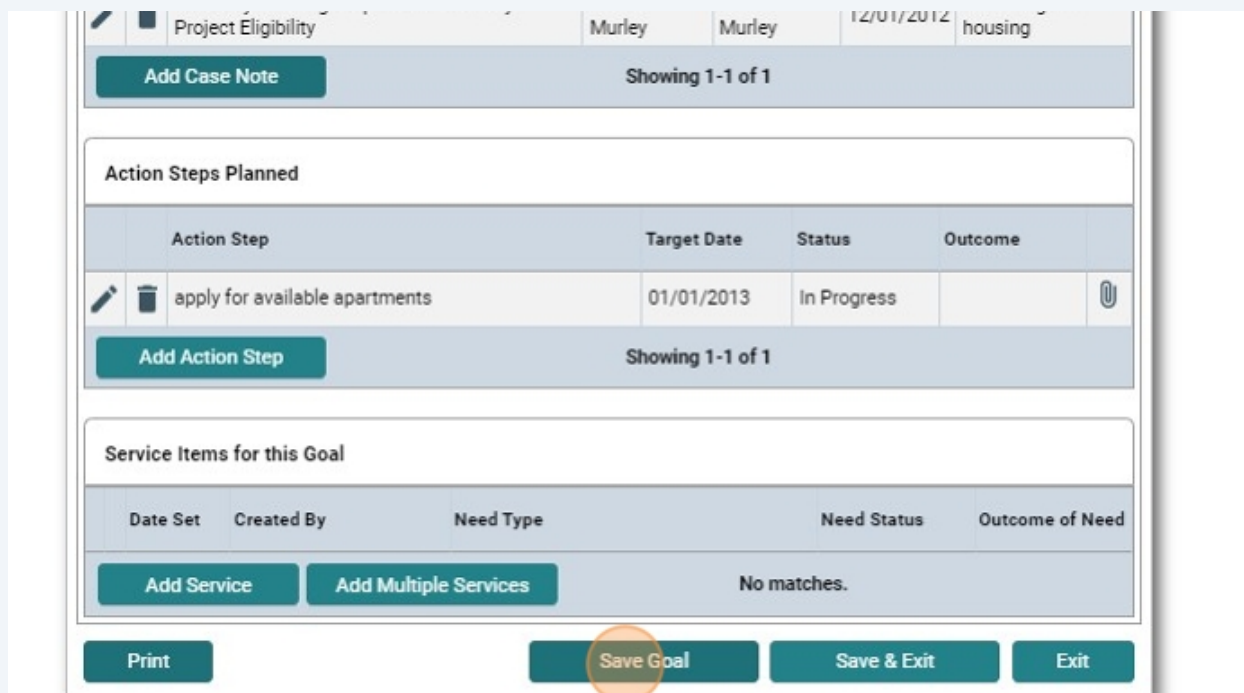
Print Save Goal Save & Exit Exit

23 Select the desired options.

Then click "Print".



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





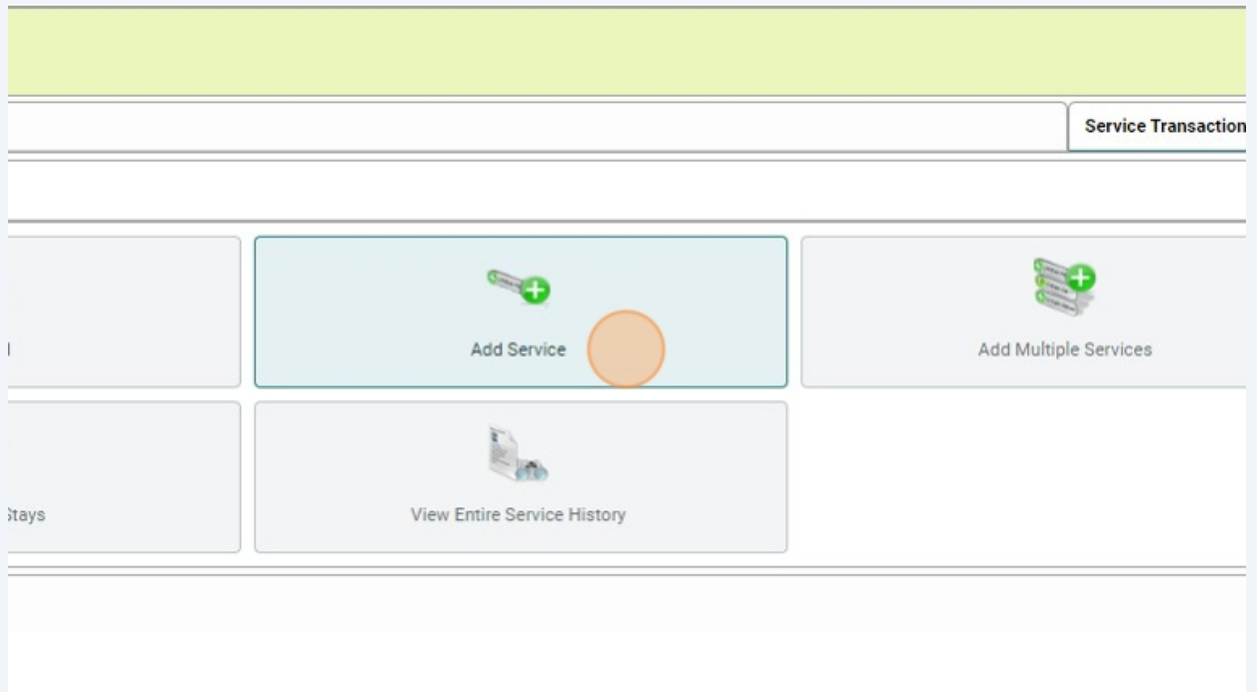
Service Transactions



Service Transactions Workflow

Date: 12/01/2012 8:00:00 AM			
-Switch to Another Household Member			
Service Transactions			
ROI	Entry / Exit	Case Managers	Cas

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.

Client Information

Add Service

▼ Household Members

☐ (10) Couple

☒ (23) Smith, John Jo (Primary Client)

☐ (24) Smith, Mary Jo

☐ (92) Smith, Sally Sue

Service Provider * Kentucky Housing Corporation - BOS (39)

Creating User Kristin Murley

Start Date * 12 / 01 / 2012 8 : 00 : 00 AM

End Date 12 / 01 / 2012 8 : 00 : 00 AM

Service Type * -Select-

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**.

Release of Information: None -Switch to Another Household Member- Submit

Client Information Service Transactions

Add Service

▼ Household Members

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

☐ (77344) Single

☒ (263826) Kitty_Hello (Left Household: 05/01/2018) (Primary Client)

☐ (115045) Couple w. Dependent Children

☐ (284320) Frehley_Paul Daniel

☒ (263826) Kitty_Hello (Primary Client)

☐ (100) Squarepants_Spongebob

Service Provider * Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) ▼

Creating User Kristin Murley

Start Date * -Select- 00 ▼ AM ▼

End Date 00 ▼ PM ▼

Service Type * Basic Needs (B) Benefits and Services Assistance (FT-1000) Case/Care Management (PH-1000) Housing Counseling (BH-3700) Housing Expense Assistance (BH-3800) Life Skills Education (PH-6200.4600) Moving Services (BH-5000)

Look Up

Save & Continue Cancel



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**.

Add Service

Household Members

- ☐ (77344) Single
- ☒ (263826) Kitty_Hello
- ☐ (115045) Couple w. Dep
- ☐ (284320) Frehley, Pa
- ☒ (263826) Kitty_Hello
- ☐ (100) Squarepants, S

Service Provider *

- Food
- Housing search and counseling services
- Legal services
- Life skills training
- Medicaid Applications
- Medicare Enrollment
- Mental health services
- Outpatient health services
- Outreach services

Service Type *

Provider Specific Service

Start Date *

End Date

Connector-SSO-BOS (3487)

AM

PM

Look Up

Save & Continue **Cancel**



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".

263826) Kitty, Hello (Left Household: 05/01/2018) (Primary Client)
045) Couple w. Dependent Children
284320) Frehley, Paul Daniel
263826) Kitty, Hello (Primary Client)
100) Squarepants, Spongebob

e Provider * Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487) ▼

ng User Kristin Murley

ate * 09 / 01 / 2024    8 : 00 : 00 AM ▼

ate 09 / 01 / 2024    12 : 00 : 00 PM ▼

e Type * Case/Care Management (PH-1000) ▼ [Look Up](#)

ler Specific e Outreach services ▼

[Save & Continue](#) [Cancel](#)



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.*

Include Additional Household Members

Service Provider *	Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487)
Creating User	Kristin Murley
Start Date *	09 / 01 / 2024 8 : 00 : 00 AM
End Date	09 / 01 / 2024 12 : 00 : 00 PM
Service Type *	Case/Care Management (PH-1000)
Provider Specific Service	Outreach services
Service Notes	Met with the client for the first time at the park. Discussed her housing history and current needs and barriers.

Moving On Assistance -Select-

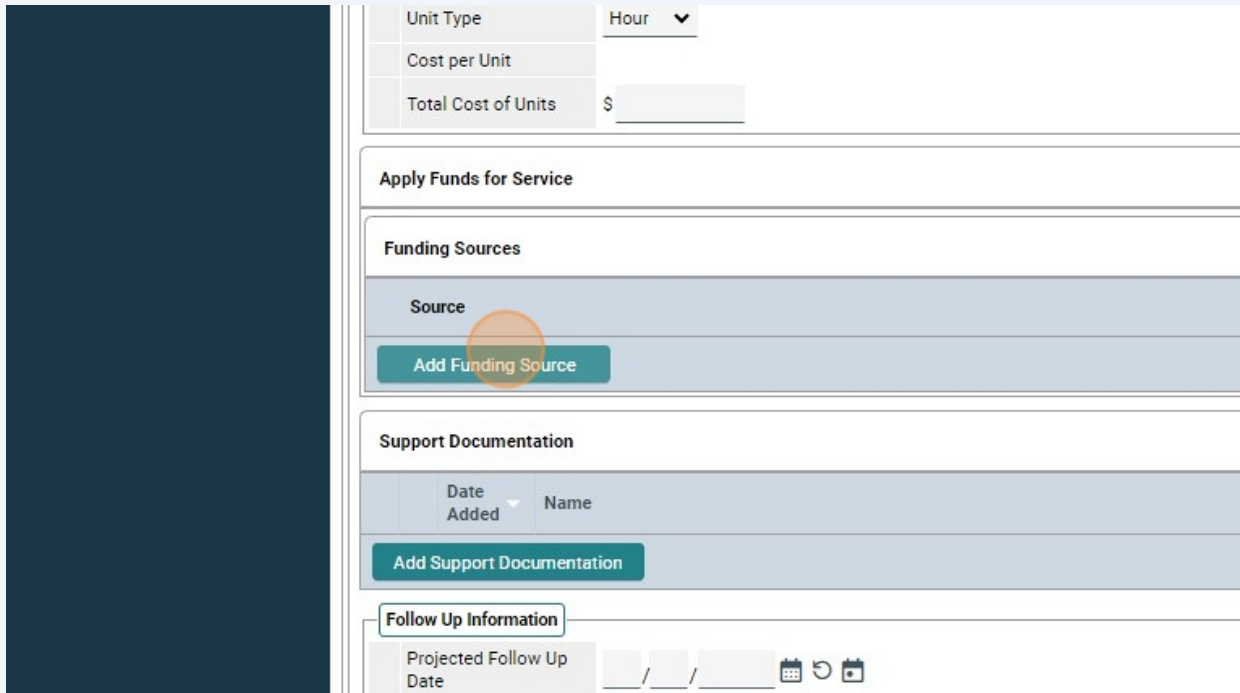
Service Costs

Number of Units	1
Unit Type	-Select-
Cost per Unit	
Total Cost of Units	\$

Apply Funds for Service

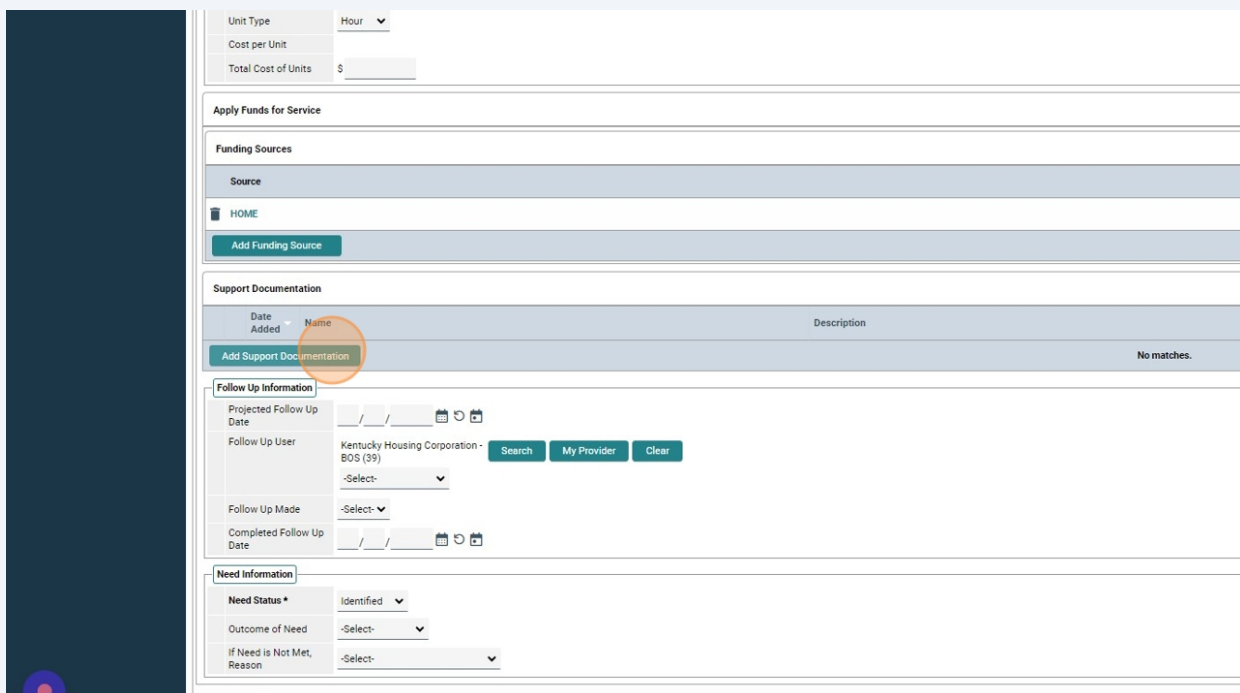
32 Next, record your funding source by clicking "Add Funding Source".

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



The screenshot shows a form interface with a dark blue sidebar on the left. The main content area has a light gray header with fields for 'Unit Type' (set to 'Hour'), 'Cost per Unit', and 'Total Cost of Units' (with a dollar sign and an input field). Below this is a section titled 'Apply Funds for Service'. Underneath, there's a 'Funding Sources' section with a table header 'Source' and a green button 'Add Funding Source' which is circled in orange. Below that is a 'Support Documentation' section with a table header 'Date Added' and 'Name', and a green button 'Add Support Documentation'. At the bottom is a 'Follow Up Information' section with a 'Projected Follow Up Date' field and a calendar icon.

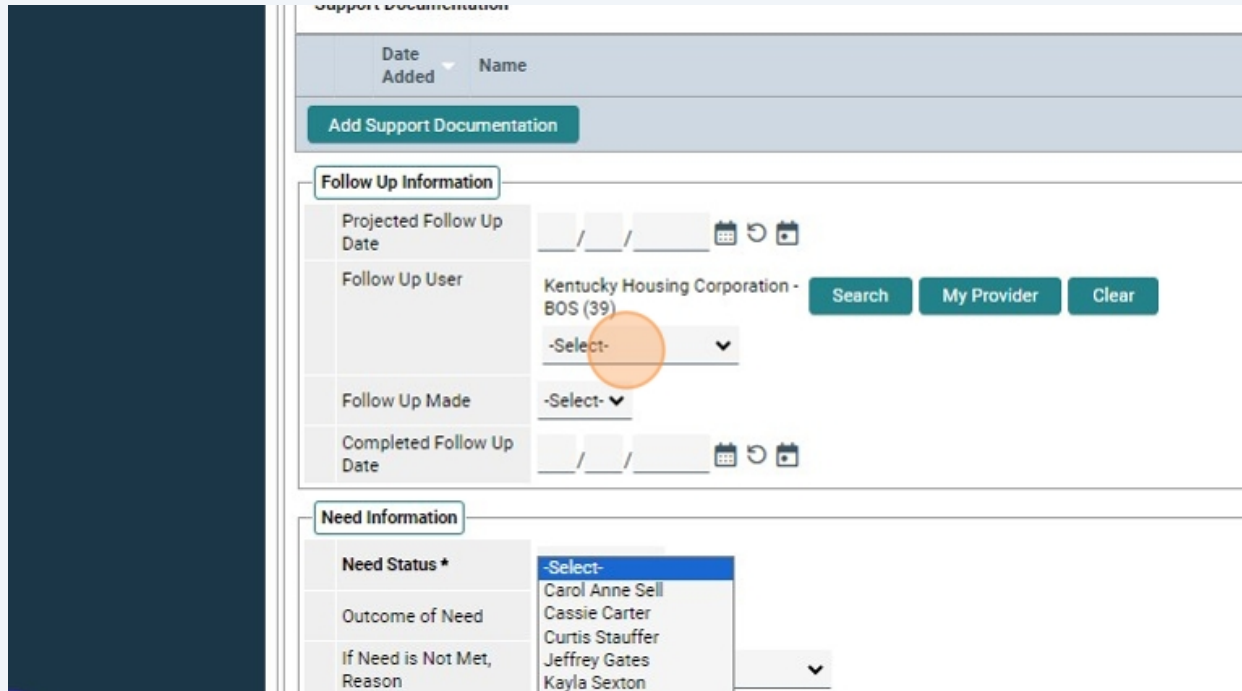
33 You can also click on "Add Support Documentation" to attach a copy of any documentation (ex: receipts, lease copy, invoice for moving services, etc.).



The screenshot shows the same form interface as before, but with the 'Add Support Documentation' button in the 'Support Documentation' section circled in orange. The 'Support Documentation' section has a table with headers 'Date Added', 'Name', and 'Description'. Below the table is a green button 'Add Support Documentation'. The 'Follow Up Information' section is expanded, showing fields for 'Projected Follow Up Date', 'Follow Up User' (set to 'Kentucky Housing Corporation - BOS (39)'), 'Follow Up Made', and 'Completed Follow Up Date'. There are also 'Search', 'My Provider', and 'Clear' buttons. At the bottom is a 'Need Information' section with fields for 'Need Status' (set to 'Identified'), 'Outcome of Need', and 'If Need is Not Met, Reason'.

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.



The screenshot displays the 'Support Documentation' form in the KYHMIS system. The form is divided into two main sections: 'Follow Up Information' and 'Need Information'. The 'Follow Up Information' section contains fields for 'Projected Follow Up Date', 'Follow Up User', 'Follow Up Made', and 'Completed Follow Up Date'. The 'Follow Up User' dropdown menu is highlighted with an orange circle, showing a list of users including 'Kentucky Housing Corporation - BOS (39)'. The 'Need Information' section contains fields for 'Need Status *', 'Outcome of Need', and 'If Need is Not Met, Reason'. The 'Need Status *' dropdown menu is also visible, showing a list of users including 'Carol Anne Sell', 'Cassie Carter', 'Curtis Stauffer', 'Jeffrey Gates', and 'Kayla Sexton'.

Date Added	Name
Add Support Documentation	

Follow Up Information

Projected Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="button" value="Calendar"/> <input type="button" value="Refresh"/> <input type="button" value="Calendar"/>
Follow Up User	Kentucky Housing Corporation - BOS (39) -Select-	<input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
Follow Up Made	-Select-	
Completed Follow Up Date	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="button" value="Calendar"/> <input type="button" value="Refresh"/> <input type="button" value="Calendar"/>

Need Information

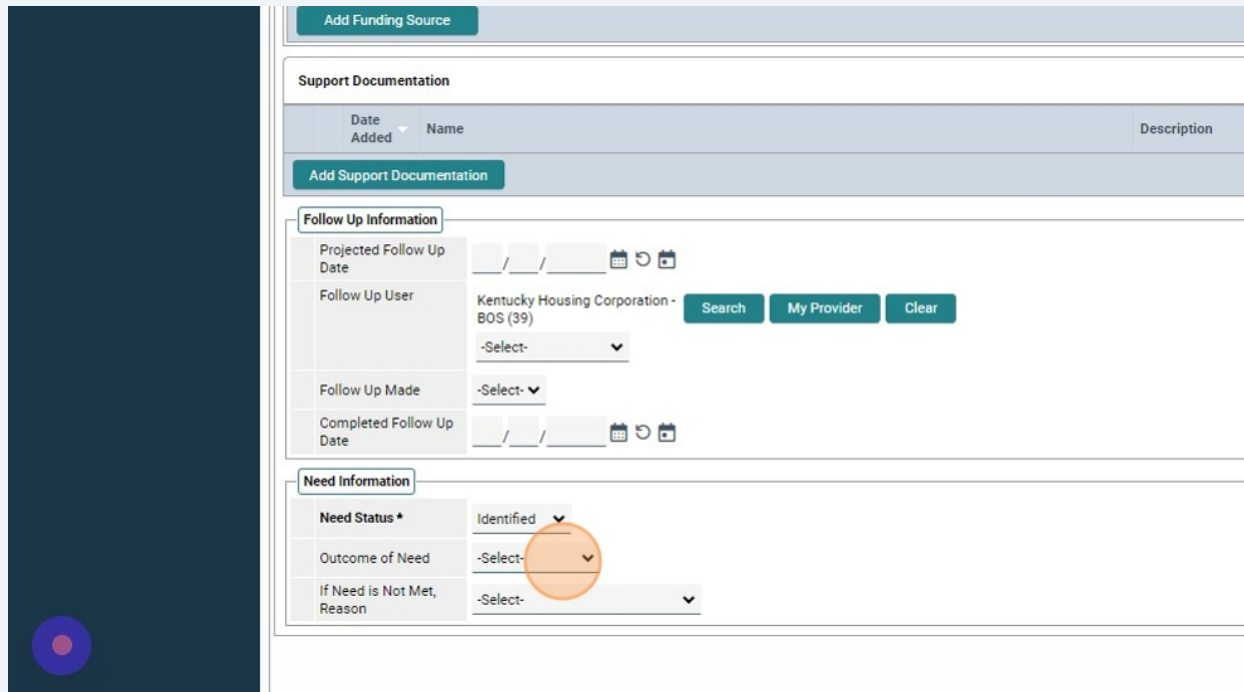
Need Status *	-Select-
Outcome of Need	Carol Anne Sell Cassie Carter Curtis Stauffer Jeffrey Gates Kayla Sexton
If Need is Not Met, Reason	<input type="text"/>

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.

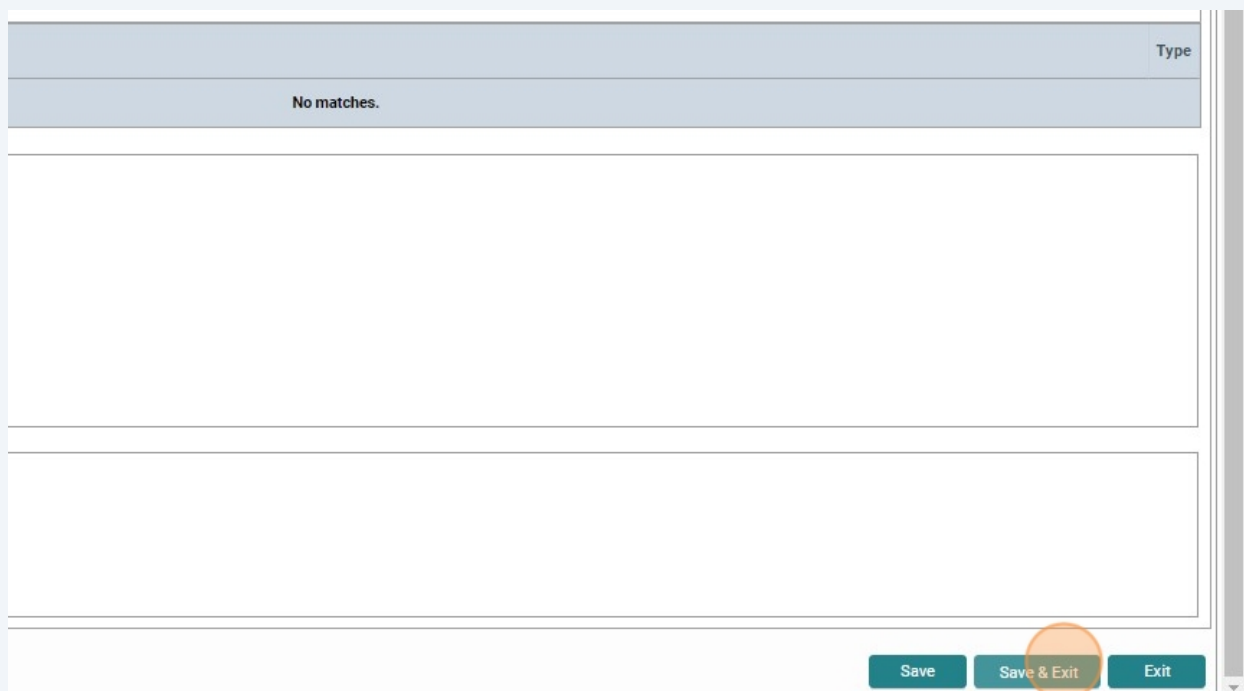


The screenshot shows a web form with the following sections:

- Add Funding Source** (button)
- Support Documentation**
 - Table with columns: Date Added, Name, Description
 - Add Support Documentation** (button)
- Follow Up Information**
 - Projected Follow Up Date: []/[]/[] (calendar icon)
 - Follow Up User: Kentucky Housing Corporation - BOS (39) (dropdown menu)
 - Follow Up Made: -Select- (dropdown menu)
 - Completed Follow Up Date: []/[]/[] (calendar icon)
- Need Information**
 - Need Status ***: Identified (dropdown menu, highlighted with an orange circle)
 - Outcome of Need: -Select- (dropdown menu)
 - If Need is Not Met, Reason: -Select- (dropdown menu)

36

Click "Save & Exit".





The screenshot shows a web form with the following elements:

- Table with columns: Type
- Table body: No matches.
- Save** (button)
- Save & Exit** (button, highlighted with an orange circle)
- Exit** (button)

Entire Service History View

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



Search

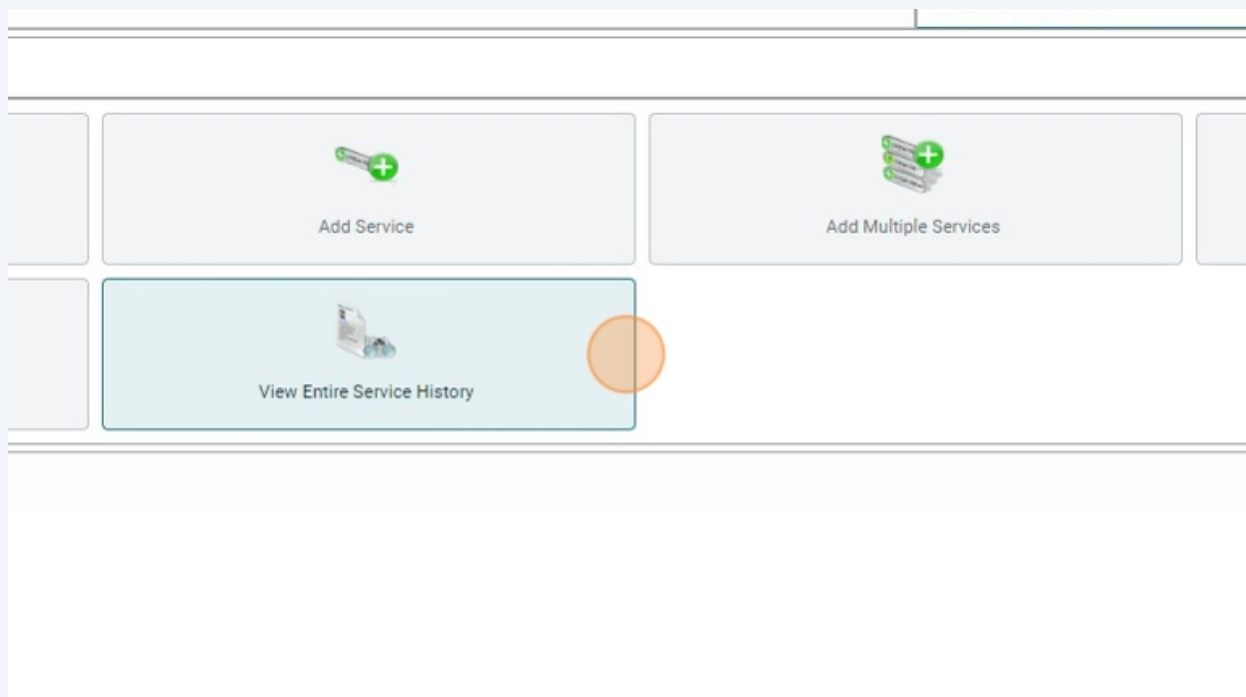
Service Type	Cost of Service
Case/Care Management	\$100.00

Showing 1-1 of 1

Back to Dashboard

Exit

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



Adding Multiple Services

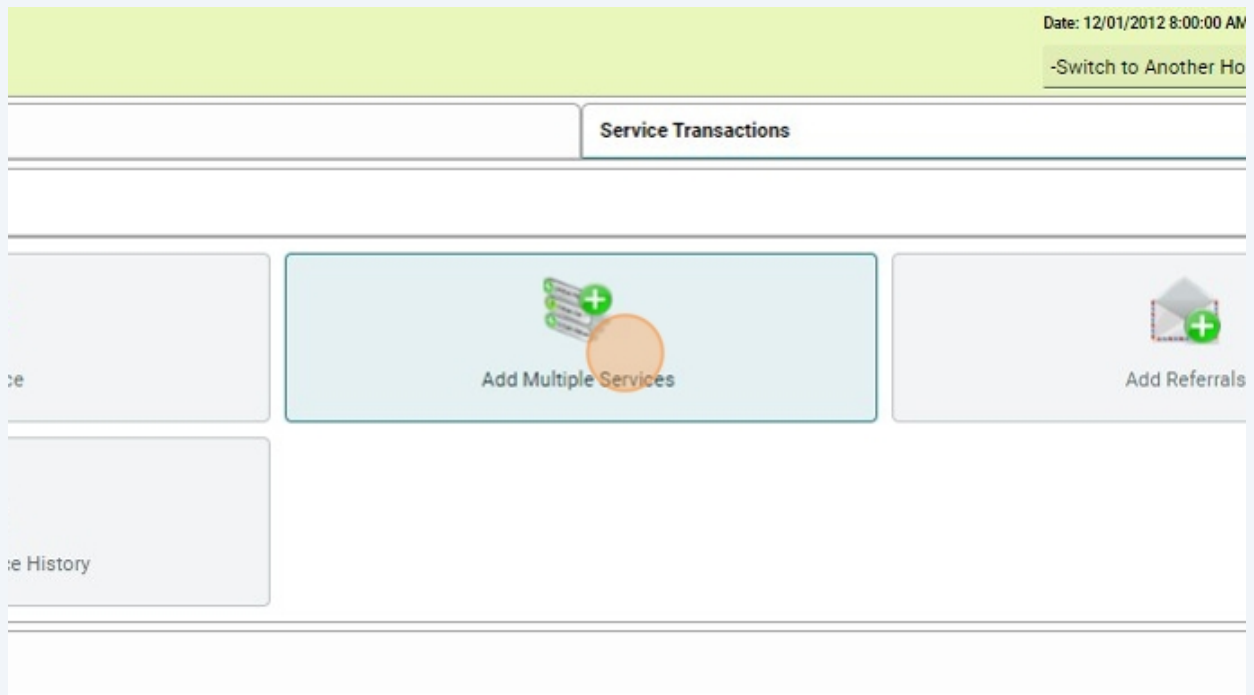


Tip!

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.

The screenshot shows a web application interface for managing clients. On the left is a dark blue sidebar with navigation links: Resources, Shelters, Scans, Reports, Admin, and Logout. The main content area has a search form at the top with fields for Alias, Social Security Number, Social Security Number Data Quality, U.S. Military Veteran?, and Exact Match. Below the form are buttons for Search, Clear, Add New Client With This Information, and Add Anonymous Client. Under the 'Client Number' section, there is a text input for Client ID # and a Submit button. The 'Client Results' section displays a table with columns for ID, Name, and Social Security Number. The table contains three entries. A red circle highlights the pencil icon next to the first client's name, 'Smith, Jean Mary, Mrs.'.

ID	Name	Social Security Number
21	Smith, Jean Mary, Mrs.	403-87-6300
23	Smith, John Jo	123-45-6789
20	Smith, John Paul, Mr	402-87-8600

- 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".

Back Date Mode

⚠ The current System Date is set to:
02/09/2024 2:56:26 PM

If you would like to use a different date, please select one below:

Back Date 07 / 02 / 2013 8 : 00 : 00 AM

Set New Back Date **Use Current System Date**

Head of Household	Relationship
Yes	Self
No	wife

Outstanding Outgoing Referrals

Referral Date

Add Referral

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

> Client Profile

Smith, John Jo

Smith, John Jo

Ends 12/01/2013

ation

Client Profile Households ROI Entry / Exit

he system 01/11/2024 09:34 AM

ne Smith, John Jo

Social Security ***-**-6789

se of Birth 01/01/1980 (Age 33)

U.S. Military Veteran? No (HUD)

e and Ethnicity Black, African American, or African Hispanic/Latina/e/o

der Man (Boy, if child)

se of Information

Entry/Exits

ider	Permission	Start Date	End Date	Program
------	------------	------------	----------	---------

44 Click "Manage Household".

Client - (23) Smith, John Jo

(23) Smith, John Jo
Release of Information: Ends 12/01/2013

Client Information

Summary Client Profile **Households** ROI Entry / Exit

▼ (10) Couple

Name

(23) Smith, John Jo

(92) Smith, Sally Sue

Manage Household

► Previous Households

Search Existing Households Start New 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.

WellSky | Community Services

ServicePoint Training Site
Kentucky Housing Corporation - BOS
February 09, 2024

Clients > Client Profile

Client - (23) Smith, John Jo

(23) Smith, John Jo
Release of Information: Ends 12/01/2013

Client Information

Summary Client Profile

▼ (10) Couple

Name

(23) Smith, John Jo

(92) Smith, Sally Sue

Manage Household

► Previous Households

Search Existing Households Start New Household

Household Information - (10) Couple

(10) Couple

Household Type * Couple

Income US\$0.00

Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(23) Smith, John Jo	33	Yes	Self	12 / 01 / 2012	0	1
(92) Smith, Sally Sue	32	No	wife	12 / 01 / 2012	0	1

Add/Delete Household Members

Household History Report

► Previous Household Members

Individual Client Assessment

Household Members

(23) Smith, John Jo
Self, Age: 33

(92) Smith, Sally Sue
wife, Age: 32

Client Record

Issue ID Card

Name Smith, John Jo

Name Data Quality Full Name Reported

Alias

Social Security ***-**-6789

SSN Data Quality Full SSN Reported (HUD)

U.S. Military Veteran? No (HUD)

Age 33

Household Profile Assessment

No Household Profile Assessment is specified for this Provider

46

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

The screenshot shows the 'Client Information' page with a sidebar on the left containing links for Clients, Resources, Shelters, Scans, Reports, Admin, and Logout. The main content area is divided into 'Client Information' and 'Previous household members'. The 'Client Search' form is visible, with the 'Search' button highlighted by an orange circle. The form includes fields for Name (First, Middle, Last, Suffix), Name Data Quality, Alias, Social Security Number, Social Security Number Data Quality, U.S. Military Veteran?, and Exact Match. Below the form are buttons for 'Search', 'Clear', 'Add New Client With This Information', and 'Add Anonymous Client'. The 'Client Number' section below the form has a 'Submit' button. The 'Selected Clients' table at the bottom shows 'No matches'.

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
No matches.							

47

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

This screenshot is a close-up of the 'Add New Client With This Information' button, which is highlighted with an orange circle. The button is part of a row of four buttons: 'Search', 'Clear', 'Add New Client With This Information', and 'Add Anonymous Client'. Below the buttons is the 'Client Number' section, which includes a text input for 'Client ID #' and a 'Submit' button. At the bottom, the 'Client Results' table is shown with the message 'No matches.'.

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
No matches.							

48

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

Add Clients to the Household

Client Search

Please Search the System before adding a New Client. [Hide Advanced Search](#)

Name: First: Baby, Middle: Mae, Last: Smith, Suffix:
 Name Data Quality: -Select-
 Alias:
 Social Security Number:
 Social Security Number Data Quality: -Select-
 U.S. Military Veteran?: -Select-
 Exact Match: ☐

[Search](#) [Clear](#) [Add New Client With This Information](#) [Add Anonymous Client](#)

Client Number

Enter or Scan a Client ID to add that Client to this Household.
 Client ID #: [Submit](#)

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
No matches.							

Selected Clients

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
(106)	Smith, Baby Mae						0

Showing 1-1 of 1

[Continue](#) [Cancel](#)

49

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

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

Household Information - (10) Couple

(10) Couple

[Save](#) [Save & Exit](#) [Exit](#)

Household Type *: Couple
 Income: US\$0.00
 Client Count: 3

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(23) Smith, John Jo				12 / 01 / 2012	0	1
(106) Smith, Baby Mae				07 / 02 / 2013	0	1
(92) Smith, Sally Sue				12 / 01 / 2012	0	1

[Add/Delete Household Member](#) [Household History Report](#)

Previous Household Members

Individual Client Assessment

Household Members

(23) Smith, John Jo
 Self, Age: 33
 (106) Smith, Baby Mae

Client Record

Name: Smith, John Jo
 Name Data Quality: Full Name Reported

[Issue ID Card](#)

50

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

(10) Couple Save Save & Exit Exit

Household Type * Couple w. Dependent Children ▼

Income US\$0.00 🔍

Client Count 3

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(23) Smith, John Jo	33	Yes ▼	Self ▼	12 / 01 / 2012	0 🔍	1 🔍
(106) Smith, Baby Mae		No ▼	-Select- ▼	07 / 02 / 2013	0 🔍	1 🔍
(92) Smith, Sally Sue	32	No ▼	wife ▼	12 / 01 / 2012	0 🔍	1 🔍

Add/Delete Household Members Household History Report

► Previous Household Members

Individual Client Assessment

Household Members Client Record Issue ID Card 🔒

(23) Smith, John Jo
Self, Age: 33

Name Smith, John Jo

51

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

Client Profile

(106) Smith, Baby Mae		No ▼	daughter ▼	07 / 02 / 2013	0
(92) Smith, Sally Sue	32	No ▼	wife ▼	12 / 01 / 2012	0

Add/Delete Household Members Hou

► Previous Household Members

Individual Client Assessment

Household Members Client Record

(23) Smith, John Jo
Self, Age: 33

(106) Smith, Baby Mae
Age: Unknown

(92) Smith, Sally Sue
wife, Age: 32

Name Smith, Baby Mae

Name Data Quality

Alias

Social Security

SSN Data Quality

U.S. Military Veteran?

Age

Household Profile Assessment

Start New Household

52 Then click "Save & Exit".

The screenshot shows a form with the following fields and values:

Data Quality	Full Name Reported
il Security	***-**-1789
Data Quality	Full SSN Reported (HUD)
Military Veteran?	No (HUD)

Below these fields is a section titled "Id Profile Assessment" with a text box containing "Id Profile Assessment is specified for this Provider". At the bottom of the form are three buttons: "Save", "Save & Exit" (highlighted with an orange circle), and "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.

The screenshot shows a system interface with a green header bar containing user information: "Shador", "Enter L", and "Back L". Below the header is a search bar with the text "Type here for Global Search". A date field shows "Date: 07/02/2013 8:00:00 AM". A dropdown menu is open, showing the option "-Switch to Another Household Member-" (highlighted with an orange circle). Below the dropdown is a table with the following data:

Service Transactions	Case Managers	Case Plans	As
Entry / Exit			

At the bottom, a dropdown menu is open, showing the option "-Switch to Another Household Member-" (highlighted with a blue bar). Below this, a list of household members is displayed:

- (10) Couple w. Dependent Children
- (106) Smith, Baby Mae
- (92) Smith, Sally Sue

On the right side of the list, there are columns for "Relationship to Head of Household" and "Joined Household". The date "12/01" is visible at the bottom right.

54

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

Shelters

Scans

Reports

Admin

Logout

Collapse <<

Client Record

Name	Smith, Baby Mae
Name Data Quality	Full Name Reported
Alias	
Social Security	***-**-1789
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	No (HUD)
Age	

Client Demographics

Date of Birth	
Date of Birth Type	
To select multiple values hold down the "ctrl" or "cmd" key and click on each value	
Race and Ethnicity	
Additional Race and Ethnicity Detail	
Gender	
If Different Identity	

Made with Scribe - <https://scribehow.com>

36

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.

The screenshot shows a web application interface for client management. At the top, a dark blue header bar displays the user's name 'Kristin Murley' and role 'System Admin II'. Below this, a light green banner contains three links: 'Shadow Mode' (awilliamson), 'Enter Data As' (Kentucky Housing Corp...), and 'Back Date Mode' (07/02/2013 8:00:00 AM). A search bar with the placeholder 'Type here for Global Search' is positioned below the banner. A date selector shows 'Date: 07/02/2013 8:00:00 AM' and a dropdown menu with '(23) Smith, John Jo' and a 'Submit' button. Below the date selector, there are tabs for 'Case Managers', 'Case Plans', and 'Assessments'. A button labeled 'Issue ID Card' is visible. On the right side, there is a placeholder for a client's profile picture.

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".

Release of Information: Ends 12/01/2013

Client Information

Summary Client Profile Households

Release of Information

Provider
Kentucky Housing Corporation - Dummy Project Eligibility

Add Release of Information

Collapse <<

57

Click the "Entry / Exit" tab.

Date: 07/02/2013 8:00:00 AM

-Switch to Another Household Member-

Service Transactions

ROI Entry / Exit Case Managers Case F

Permission	Start Date
Yes	07/02/2013
Yes	12/01/2012

Showing 1-2 of 2

58 Click the pencil next to the Project Entry date.

Date: 07/02/2013 8:00:00 AM
-Switch to Another Household Member- Submit

Service Transactions

Entry / Exit	Case Managers	Case Plans	Assessme
Household members must be established on Households tab before creating Entry / Exits			
Type	Project Start Date	Exit Date	
HUD	12/01/2012		

Showing 1-1 of 1

59 Click "Include Additional Household Members".

Edit Project Start Data - (23) Smith, John Jo

Household Members

To update Household members for this Entry Data, click the box beside each name.

☐ (10) Couple w. Dependent Children

☒ (23) Smith, John Jo / Entry Date: 12/01/2012 8:00 AM

☒ (92) Smith, Sally Sue / Entry Date: 12/01/2012 8:00 AM

Include Additional Household Members

Edit Project Start Data - (23) Smith, John Jo

Provider	Kentucky Housing Corporation - Dummy Project Eligibility (2234)
Type	HUD
Project Start Date *	12 / 01 / 2012 8 : 00 : 00 AM

Save & Continue Cancel

Showing 1-1 of 1

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

The screenshot shows a software interface with a modal dialog box titled "Include Additional Household Members". The dialog box contains a list of household members with checkboxes next to their names. The following table represents the data in the dialog:

Household Members
<input type="checkbox"/> (10) Couple
<input type="checkbox"/> (10) Couple w. Dependent Children
<input checked="" type="checkbox"/> (23) Smith, John Jo
<input type="checkbox"/> (106) Smith, Baby Mae
<input checked="" type="checkbox"/> (92) Smith, Sally Sue

Below the list are "Continue" and "Cancel" buttons. An orange circle highlights the checkbox for "(23) Smith, John Jo".

61 Then, click "Save & Continue".

The screenshot shows the software interface after the dialog box is closed. The "Save & Continue" button is highlighted with an orange circle. The interface displays a list of household members and a table with project start and exit dates.

Household Members:

- (23) Smith, John Jo (Entry Date: 12/01/2012 8:00 AM)
- (106) Smith, Baby Mae (Joined Household: 07/02/2013)
- (92) Smith, Sally Sue (Entry Date: 12/01/2012 8:00 AM)

Project Start Date - (23) Smith, John Jo

Project Start Date	Exit Date
12/01/2012	

Showing 1-1 of 1



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.



















that Assessment record for the Client.

Provider * Kentucky Housing Corporation - Dummy Project Eligibility (2234) ▼

Type * HUD ▼

Update

Household Members Associated with this Entry / Exit

	Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving
	 (23) Smith, John Jo	Yes	 12/01/2012				
	 (106) Smith, Baby Mae	No	 12/01/2012				
	 (92) Smith, Sally Sue	No	 12/01/2012				

Include Additional Household Members Showing 1-3 of 3

Entry Assessment

Select an Assessment

☒ BOS- HUD CoC & ESG RRH Entry (FY2024) ☒ BOS- HUD CoC & ESG RRH Update (FY2024) ☒ BOS- HUD CoC & ESG & TBRA Exit (FY2024)

63

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

☐ (10) Couple w. Dependent Children

☐ (23) Smith, John Jo (Entry Date: 12/01/2012 8:00 AM)

☒ (106) Smith, Baby Mae (Entry Date: 12/01/2012 8:00 AM)

☐ (92) Smith, Sally Sue (Entry Date: 12/01/2012 8:00 AM)

[Include Additional Household Members](#)

Edit Project Start Data - (106) Smith, Baby Mae

Provider: Kentucky Housing Corporation - Dummy Project Eligibility (2234)

Type: HUD

Project Start Date *: 12 / 01 / 2012 8 : 00 : 00 AM

[Save & Continue](#) [Cancel](#)

Select an Assessment

☒ BOS- HUD CoC & ESG RRH Entry (FY2024) ☒ BOS- HUD CoC & ESG RRH Update (FY2024) ☒ BOS- HUD CoC & ESG &

64

Click "Save & Continue".

[Baby Mae \(Entry Date: 12/01/2012 8:00 AM\)](#)

[Sally Sue \(Entry Date: 12/01/2012 8:00 AM\)](#)

[Include Additional Household Members](#)

ata - (106) Smith, Baby Mae

Provider: Kentucky Housing Corporation - Dummy Project Eligibility (2234)

Type: HUD

Project Start Date *: 07 / 02 / 2013 8 : 00 : 00 AM

[Save & Continue](#) [Cancel](#)

Select an Assessment

☒ BOS- HUD CoC & ESG RRH Entry (FY2024) ☒ BOS- HUD CoC & ESG RRH Update (FY2024) ☒ BOS- HUD CoC & ESG & TBRA Exit (FY2024)

BOS- HUD CoC & ESG RRH Entry (FY2024) Entry Date: 12/01/2012 08:

SECTION 1: ANSWER FOR ALL CLIENTS

Follow Ups	Reason for Leaving	Destination

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.

Select an Assessment

☒ BOS- HUD CoC & ESG RRH Entry (FY2024) ☐ BOS- HUD CoC & ESG RRH Update (FY2024) ☐ BOS- HUD CoC & ESG & TBRA Exit (FY2024)

Household Members

(23) Smith, John Jo
Age: 32
Veteran: No (HUD)

(106) Smith, Baby Mae
Age: 0
Veteran: No (HUD)

(92) Smith, Sally Sue
Age: 32
Veteran: No (HUD)

BOS- HUD CoC & ESG RRH Entry (FY2024)

SECTION 1: ANSWER FOR ALL CLIENTS

Enrollment CoC G

Relationship to Head of Household G

Housing Move-in Date G

Based on the housing move-in date above, what county was the client housed in? G

Unit Address G

Unit City G

Unit Zip G

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.

Disabilities (Please List Drug and Alcohol Disabilities Separately. DO NOT USE THE "BOTH DRUG AND ALCOHOL ABUSE" choice.) HUD Verification ☒

Disability Type	Disability determination	Start Date *
<input checked="" type="checkbox"/> Physical (HUD)	No (HUD)	07/02/2013
<input checked="" type="checkbox"/> HIV/AIDS (HUD)	No (HUD)	07/02/2013
<input checked="" type="checkbox"/> Mental Health Disorder (HUD)	No (HUD)	07/02/2013
<input checked="" type="checkbox"/> Chronic Health Condition (HUD)	No (HUD)	07/02/2013
<input checked="" type="checkbox"/> Drug Use Disorder (HUD)	No (HUD)	07/02/2013

Add Showing 1-5 of 8 First Previous Next Last

SECTION 2: ☒ IF CLIENT IS A MINOR WHO IS NOT HEAD OF HOUSEHOLD STOP DATA ENTRY HERE

INCOME INFORMATION (required information)

Income from Any Source? G

Monthly Income HUD Verification ☐

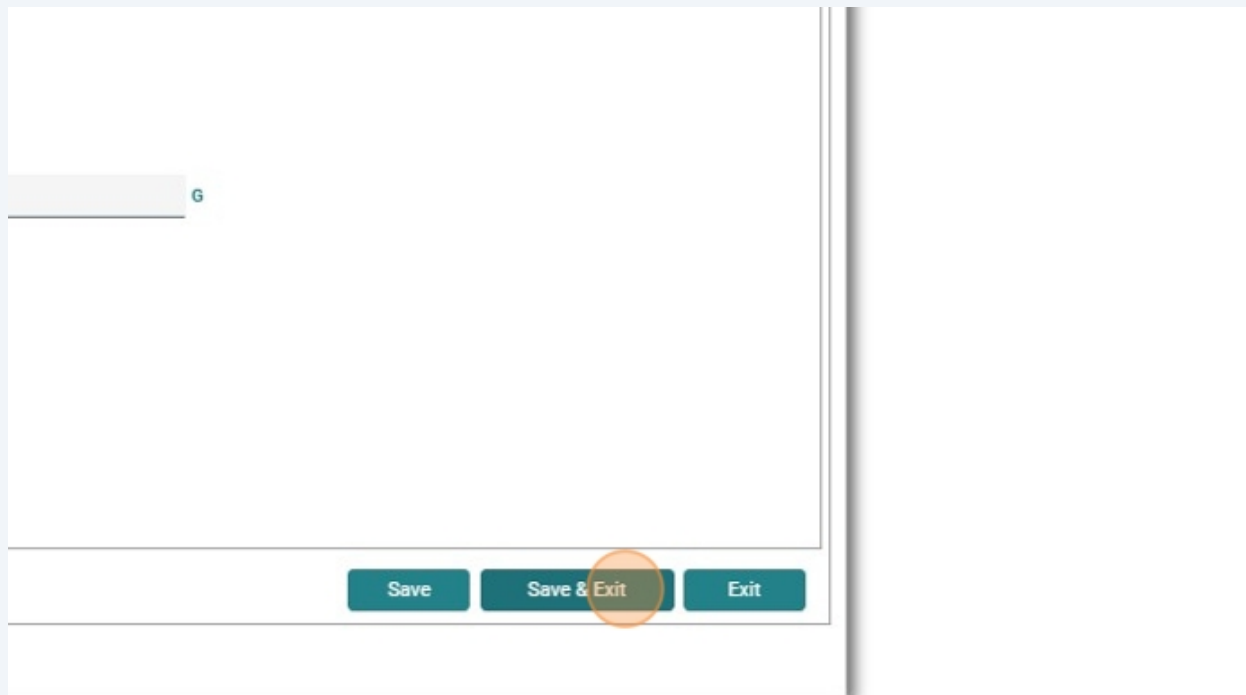
Start Date *	End Date	Source of Income	Monthly Amount
Add View Gross Income			

Total Monthly Income G

NON-CASH BENEFITS (required question)

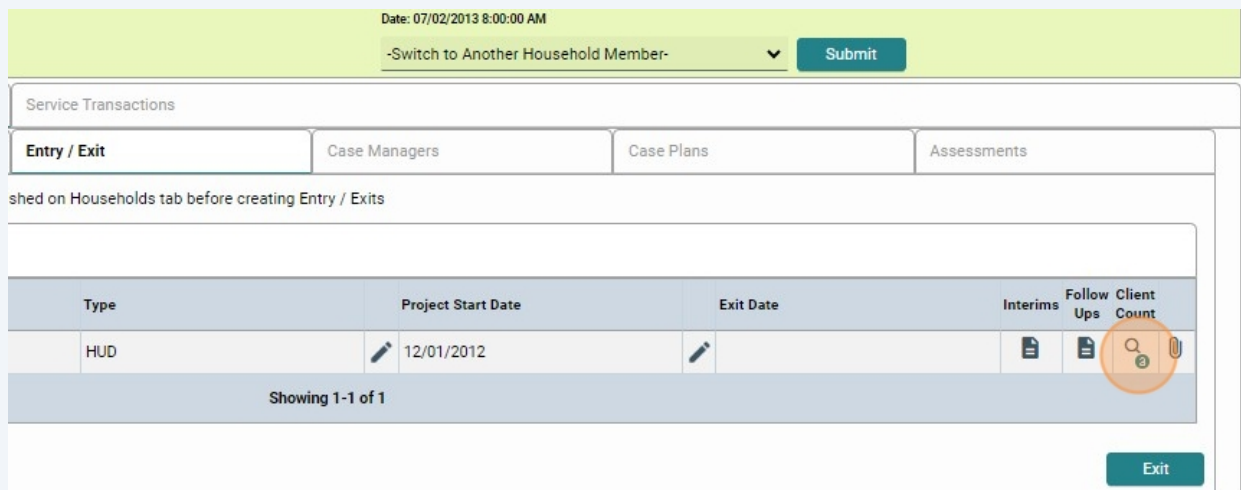
Non-cash benefit from any source? G

67 Click "Save & Exit" when finished.



A screenshot of a web form. At the bottom, there are three buttons: "Save", "Save & Exit", and "Exit". The "Save & Exit" button is highlighted with an orange circle. Above the buttons, there is a large empty text area and a small label "G" on the left.

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.



A screenshot of a web application interface. At the top, there is a green header bar with the date "Date: 07/02/2013 8:00:00 AM" and a dropdown menu labeled "-Switch to Another Household Member-" with a "Submit" button. Below this is a tabbed interface with four tabs: "Entry / Exit", "Case Managers", "Case Plans", and "Assessments". The "Entry / Exit" tab is selected. Below the tabs, there is a text label "shed on Households tab before creating Entry / Exits". A table is displayed with the following columns: "Type", "Project Start Date", "Exit Date", "Interims", "Follow Ups", and "Client Count". The table contains one row with the value "HUD" in the "Type" column and "12/01/2012" in the "Project Start Date" column. The "Client Count" column has a magnifying glass icon with a green circle around it. Below the table, it says "Showing 1-1 of 1". At the bottom right, there is an "Exit" button.

Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
HUD	12/01/2012				

