YHDP - General Information / Guide*

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Document Maintainers: Tachica
ConnectWise Trigger: Application > CaseWorthy > General - Program Information S+C/PSH/TLP/Service*

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Overview

Getting CT HMIS Help and Training

Technical support is available from our Help Desk via a variety of methods for any questions regarding either the CaseWorthy software or with Policy and Procedure standards.

- Email: **help@nutmegit.com**
- Online Resources and Information: **http://www.cthmis.com/** or **HMIS Knowledge Base**

Logging into CaseWorthy

1. Access the Live CT HMIS site by going to **https://ecm.cthmis.com/cceh.ecm**
2. Enter your Username and Password.
    a. If you forget your password, simply click the **Forgot Password** link and follow the prompts.

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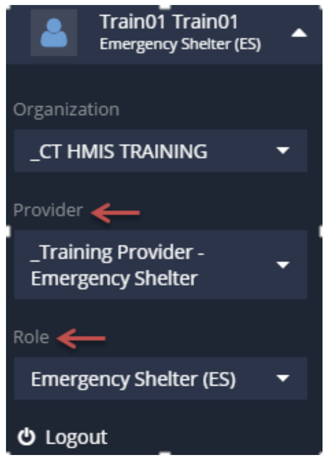
Instructions

Before You Begin:

1. Please ensure you are using the correct ***Role*** (Click on the arrow located in the Top right corner to expand the user are as displayed in the screenshot below).
2. Your Provider should be the name of the ***Provider*** you wish to enter data for (Top right corner).



Enrolling a Client into a program:

1. Click "**Enroll Client**" from the left side menu to launch the workflow.
2. Enter the CaseWorthy ID or the first few letters of the First and Last Name and Date of Birth
3. Click "**Check for duplicates**" and review the results
   a. If the client is not found in the search results, click **This is a new client** to proceed.
   b. Complete all required fields indicated by the stars.
4. Click **Save.**
5. The "CCEH HMIS Add Family Member Spreadsheet" screen will load, if enrolling a family, complete the following steps:
   a. Click **Add Row** to enter additional family members. Add all family members, ***BEFORE*** clicking the Save button!!
   b. **Check for Duplicates** is required (*) for each additional family member. If no matches are found, you **must** click the "**This is a new client"** button to proceed. If a match is found, click on the name to select it.
   c. Click **Save** to proceed to the next page (located in the bottom right corner).
6. Enter the **Section I: Release Share Status.** If a client refuses to sign the ROI, do not enter that person in your program in HMIS (you will not see a save button if that is selected). Complete all required fields and click **save**.
7. Enter the **Release Start Date** and the **Release End Date**. The standard HMIS release period for CT is 2 years.
8. Choose "**Yes**"for:
   a. Client/Witness (case manager/staff) has signed Release.

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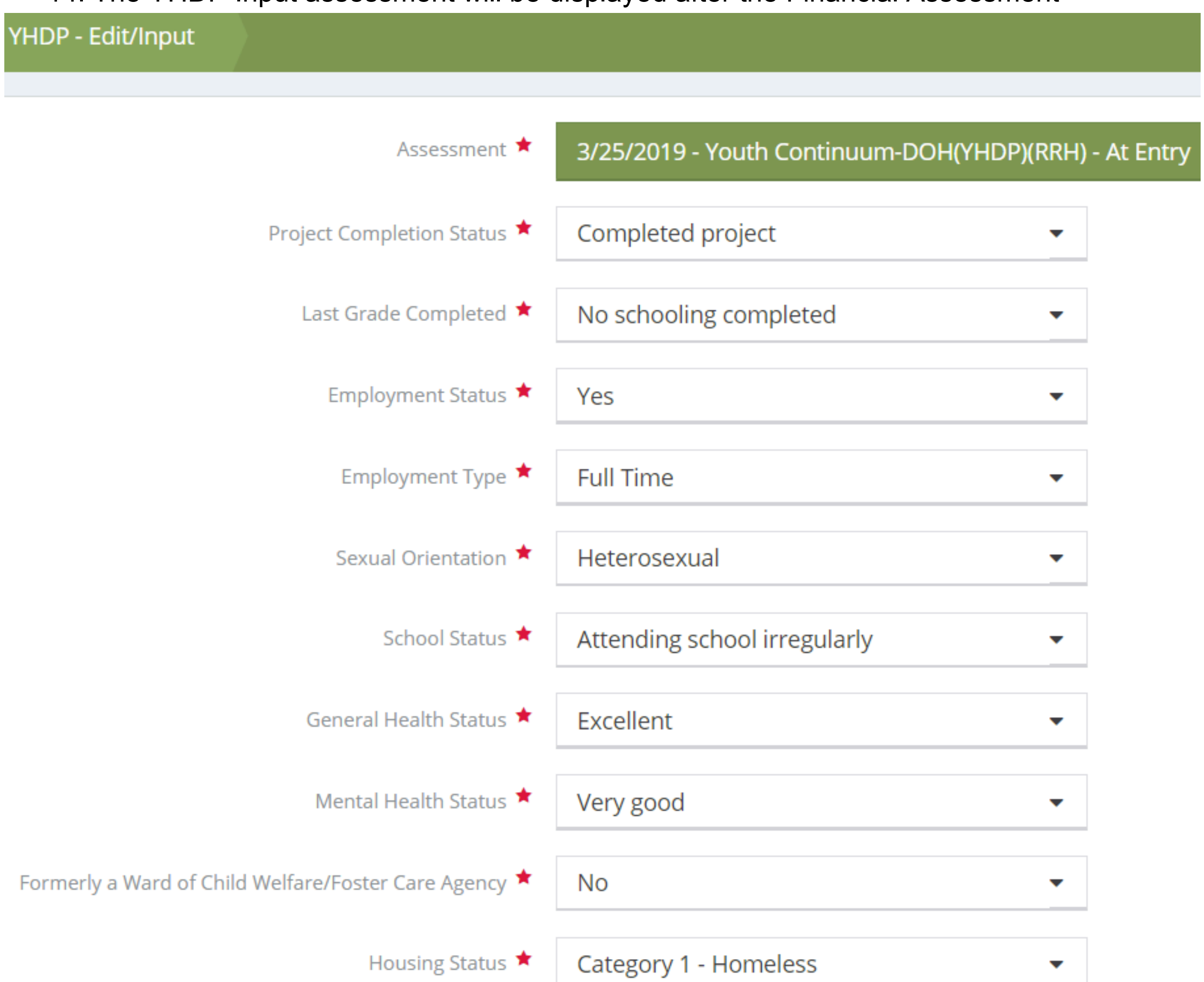
9. Click **Save** to proceed to the next page (located in the bottom right corner)
10. Choose the ***Program*** the client is being enrolled in. Verify the *Provider* matches the name in the program drop down you selected.
    a. Make sure the ***Program Entry Date*** is accurate!
11. Click **SAVE** at the bottom right corner.
12. Next the HMIS Enrollment Members screen will appear

*If enrolling a Single person (no family members) simply click **Save** to proceed to the next page.*

If enrolling a family, follow the steps below:

    a. Click the **checkbox** next to family member's names to include them in the program enrollment and the rest of this workflow. Their **checkbox** will turn blue.
    b. Make sure to change the **Begin Date to the correct date!**
    c. Click **Save** to proceed to the next page (located in the bottom right corner).

13. Complete the assessments as prompted from within the Enroll Client Workflow, clicking "**SAVE**" at each screen when you have provided answers to all *required* questions (indicated by the stars). If you enroll a family, you will have to complete assessments for all family members.
14. The YHDP Input assessment will be displayed after the Financial Assessment


YHDP - Edit/Input

Assessment *	3/25/2019 - Youth Continuum-DOH(YHDP)(RRH) - At Entry
Project Completion Status *	Completed project
Last Grade Completed *	No schooling completed
Employment Status *	Yes
Employment Type *	Full Time
Sexual Orientation *	Heterosexual
School Status *	Attending school irregularly
General Health Status *	Excellent
Mental Health Status *	Very good
Formerly a Ward of Child Welfare/Foster Care Agency *	No
Housing Status *	Category 1 - Homeless

15. Once you have completed the workflow, the client will appear as "**Enrolled**" in the Enrollment Member - CT HMIS screen (found by clicking **Case Management>Program Enrollment** left side menu).

Services (Required by Services Only programs only):

1. On the *left-side navigation*, click "**Case Management**".
2. On the *sub-menu*, click "**Services**".
3. Click "**Add new**" (top left corner).
4. Choose the "**Program**" the client is enrolled in and wait for the screen to load the services attached to the program.
    a. If a client is exited, no program enrollment will show.
    b. DOH AIDS Funded programs are required to enter at least one case management service, per month, per client, but can enter other services provided as well.
5. Click on the **checkboxes** for the Services you wish to add.
6. Change the **Begin Date & End Date** to the same date ex. 10/01/2015-10/01/2015.
7. Click **Save** at the bottom of the form.

Financial Service Request (required by YHDP and RRH programs that use the HMIS approval process) *For HoH's only*

1. You will not see the **Service Request** option under **Case Management** if you are not in the correct role.
2. Now search for the client you wish to add the request for (if they are not currently loaded in the top left corner).
    a. To do this click the "**Find Client**" button located under the header. Once the search has been performed select your client from the list by clicking on their name. The client's name should be visible in the top left corner.
3. Select **Case Management** from the left side-menu then select "**Service Request"**.
4. ****Please Note**** you must click on the words "**Service Request**" and NOT the "**plus sign**" next to it. Screenshot of the "**Service Request**" option is below:

5. Now select **Add Request for Financial Service**.
6. Enter all **required information** (indicated by the **red stars**). Nothing will show if the client's program enrollment has been ended/exited.
7. Enter a **Case Note** if your program requires it.
8. Click **save** to enter the financial service request. It is now awaiting approval. Once approved, it will show under on the Services Summary page (found by clicking on **Services**).

Updating a Client's record using the "New Annual or During Program Assessment workflows":

1. On the *left-side navigation*, click "**Case Management**".
2. On the *sub-menu*, click "**Program Enrollment**".
3. Click on the **gear** next to the Program Enrollment that has ended.
4. Click on **New During Program or Annual Assessment**.

5. Complete all required questions in the workflow, clicking **save** at the end of each assessment.
6. Click **"Done"** in the workflow is now complete screen.

Exiting a Client from a program:

1. On the *left-side navigation*, click "**Case Management**".
2. On the *sub-menu*, click "**Program Enrollment**".
3. Click on the **gear** next to the Program Enrollment that has ended.
4. Click on **Exit Enrollment for ALL Family Members. Do NOT Edit/Exit Enrollment**.
5. Enter the **End Date** for the program enrollment (aka Exit/Discharge date). Click **Save**.
6. Complete all required questions in the Exit Assessments and click **Save** at the end of each assessment.

Files and Documents

You can upload any saved file/document to a client's record (ex. copy of Id, Birth Certificate, Utility bills, etc)

To upload a file or document

1. On the *left-side navigation*, click "**Case Management**".
2. On the *sub-menu*, click "**Files and Documents**".
3. When the dashboard for "View Photos" is displayed, click on "**Documents**".
4. The "Document Check - CTHMIS" screen will load. Click on "**Add New"** in the top right corner of that page.
5. Complete all required fields. Choose the Document Type, Verification Method, Storage Location.
6. Next you need to *upload the Image* by clicking on "**Browse"** to choose from the list of saved files on your computer/server. Once the desired file is located, double click on it to upload it.
7. Click **Save** and the file will be uploaded to the client's record in HMIS.
   a. To view the Documents and Files that a client has in HMIS, simply click on **Documents or View Photos** (located in the **View Photos dashboard** found after clicking on **Files and Documents in the left-side menu**).

To Delete an uploaded document

1. On the *left-side navigation*, click "**Case Management**".
2. On the *sub-menu*, click "**Files and Documents**".
3. When the dashboard for "View Photos" is displayed, click on "**Documents**".
4. From the "Document Check - CTHMIS" screen, select the checkbox next to the row you want to delete. When the row highlights, click the "**X**" icon, and click **OK** to the confirmation popup.
5. Click **Save** at the bottom of the form.

Below you will find the link for the HMIS Data Standards Manual where you can find more specific information from the federal partners (ex. why is this question asked?):

https://www.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual.pdf