

# HMIS Agency Staff

Training Guidebook



## ARLINGTON VIRGINIA



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  - **Dismiss**

# HMIS Referrals: *Creating a Referral*

ARLINGTON VIRGINIA

DHS-Clinical Coordination Program Coordinated Entry (CE)

CHANGE REPORTING MESSAGES

Search Term(s)... Within Participants In Coordinated Entry (CE) SEARCH

**Participant Information**

CaseNumber: [REDACTED]  
FirstName: [REDACTED]  
LastName: [REDACTED]  
DOB: 03/31/1986  
Age: 36 years  
CellPhone: [REDACTED]

[View/Edit Participant](#)  
[View Appointments](#)

**Caseworkers**

Caseworkers  
[REDACTED]  
Edit

No records to display.

**Family Information**

Family  
[REDACTED] Family  
Self/Head of Household

[Family Program History](#)  
[Family Composition History](#)

**Action Links**

Links  
[Participant Program History](#)  
[Manage Groups](#)





**Recent Phone Visits**

Recent Phone Visits

There are no recent TouchPoints for this participant.

**Recent TouchPoints**

Recent TouchPoints

Take Action	TouchPoint	Collection	Program	Name	Subject Type	Status	Date Completed	Date Last Updated	Audit Creation Date	Last Updated By	Att
   	HUD Assessment (Entry/Update/Annual/Exit)		Coordinated Entry (CE)	[REDACTED]	Participant		3/16/2022	3/16/2022	3/16/2022	[REDACTED]	

+ New

**Programs**

Programs

Program Name	Start Date	End Date	Reason for Dismiss
<a href="#">Coordinated Entry (CE)</a>	3/16/2022	Pending	

**Recent Referrals**

Recent Referrals

There are no recent Referrals for this Participant.

[View All](#)

+New

# HMIS Referrals: *Creating a Referral*

The screenshot shows the 'Add Referral for' form in the HMIS system. The form is titled 'Add Referral for' and is currently set to 'DHS-Clinical Coordination Program Coordinated Entry (CE)'. The form includes a search bar for 'Search Term(s)...', a dropdown menu for 'Within' (set to 'Participants'), and another dropdown menu for 'In' (set to 'Coordinated Entry (CE)'). A 'SEARCH' button is located to the right of the dropdowns.

The main section of the form is titled 'SELECT Type Of Referral' and contains five radio button options:

- to Site
- to Entity (Service Providers)
- to Entity (Employers)
- to Entity (Education Institution)
- to Program

A 'Submit' button is located below the radio button options.

Two callout boxes provide instructions for the radio button options:

- The first callout box, pointing to the 'to Site' option, contains the text: **Select, "to Site" to refer out to another CoC partner**
- The second callout box, pointing to the 'to Program' option, contains the text: **Select, "to Program" to refer within your organization to a different program**

The left sidebar contains a navigation menu with the following items: To-Do List, New, My Favorites, My Calendars, Help, Participants, Participant History, Referrals & Housing, Referrals, My Work, Entities, TouchPoints, Reports, Wizards, Marketplace, ETO Insight, Program Administration, Site Administration, Enterprise, and Connect.

The footer of the page includes the Social Solutions logo, the copyright notice '© 2001-2022 Developed by Social Solutions Global, Inc.', and social media icons for Twitter, Facebook, Instagram, YouTube, LinkedIn, and Messenger.

# HMIS Referrals: *Creating a Referral*

- ☰
- 🌐
- ARLINGTON VIRGINIA
- ☰ To-Do List
- 📄 New
- ★ My Favorites
- 📅 My Calendars
- Help
- Participants
- Participant History
- Referrals & Housing
- Referrals
- My Work
- Entities
- TouchPoints
- Reports
- Wizards
- Marketplace
- ETO Insight
- Program Administration
- Site Administration
- Enterprise
- Connect

DHS-Clinical Coordination Program  
Coordinated Entry (CE)

CHANGE REPORTING MESSAGES  

Search Term(s)... Within Participants In Coordinated Entry (CE) **SEARCH**

## Add Referral for

### Referral Information

Participant Name: 

Site:   
--Select--  
--Select--  
Bridges to Independence (has agreed to accept referrals)  
DHS  
Doorways

Reason for Referral: 

Referral Date:  -30 | +90

Pending Drop Off Date:  -30 | +90

Referral Status:   
--Select--  
New Hope Housing  
PathForward  
Transitional Housing (TH-FAM)

Release Participant Information:

Date of Next Contact:  -Month- -Day- -Year- +1 | +7 | +30 | +90

Time Spent on Contact:  (minutes)

Select the Site (CoC Partner),  
then the Program name.

Check, "Dismiss From Program"  
after completing the referral.

Referral Notes:

### Program: Coordinated Entry (CE)

Dismiss From Program:


Reason for Dismissal: 





Program Dismissal Date:  Jan 1 2025

Successfully Completed:

Submit

# HMIS Referrals: *Accepting a Referral*



 CHANGE
  REPORTING
  MESSAGES
 

Within
Participants
InSEARCH

HMIS Housing

**Take Action**

- [View Pending Referrals](#)
- [Enroll from a Program in this Site](#)
- [Enroll from another Site](#)
- [Add a New Household](#)
- [Add/Edit Families](#)
- [View/Edit Demographics](#)
- [Complete/Review Client TouchPoints](#)
- [Housing: Manage Rooms](#)
- [Refer Participants](#)
- [Dismiss Participants](#)

**Reports**

- [Currently Active Participants](#)  
Provides a list of all active clients and how many days they have been enrolled in the program.
- [Review Participant Efforts \(Individual\)](#)  
Review all work done with an Individual and a graphic depiction of progress.
- [Check for Duplicates](#)  
Looks for possible duplicated participants. This is based on criteria set by your ETO Administrator
- [HMIS Data Set](#)  
Pull a New HMIS Data Set to run HMIS reports





**My Caseload**

**My Caseload**

PARTICIPANT	START DATE
No records to display.	

**Recent TouchPoints**

**My Recent TouchPoints**

Take Action	TouchPoint	Dashboard Collection	Program	Name	Subject Type	Status	Date Completed	Date Last Updated	Ar Cre D
   	HUD Assessment <small>(Entry/Update/Annual/Exit)</small>		Residential Program	[REDACTED]	Participant		4/6/2022	5/9/2022	5/9/2022


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# HMIS Referrals: *Accepting a Referral*

# HMIS Referrals: *Accepting a Referral*

The screenshot displays the 'View Pending Site Referrals' page in the HMIS system. The interface includes a navigation sidebar on the left, a search bar at the top, and a table of referrals. The table has the following columns: Participant Name, Referring Program, Referring Site, Reason for Referral, Referral Date, Program Start Date, Pending Drop Off Date, and Take Action. The first row of the table is highlighted, and its 'Take Action' column is enclosed in a red box. A red arrow points from the text 'Manage referral under Take Action' to this box.

Participant Name	Referring Program	Referring Site	Reason for Referral	Referral Date	Program Start Date	Pending Drop Off Date	Take Action
1. [REDACTED]		DHS-Clinical Coordination Program	Temporary housing and other financial aid	5/23/2022	06/03/2022	6/22/2022	<a href="#">Referral Details</a> <a href="#">Participant Details</a> <a href="#">Accept</a> <a href="#">Do Not Accept</a>



# Search Functions: *Searching Within a Program*

ARLINGTON VIRGINIA

DHS-Clinical Coordination Program  
Coordinated Entry (CE)

CHANGE REPORTING MESSAGES

Search: Fake Within Participants In Coordinated Entry (CE) SEARCH

Search by Last Name

Search within Current Program

HMIS

**Take Action**

- [View Pending Referrals](#)
- [Enroll from a Program in this Site](#)
- [Enroll from another Site](#)
- [Add a New Household](#)
- [Add/Edit Families](#)
- [View/Edit Demographics](#)
- [Complete/Review Client TouchPoints](#)
- [Refer Participants](#)
- [Dismiss Participants](#)

**Reports**

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- [HMIS Data Set](#)  
Pull a New HMIS Data Set to run HMIS reports

**My Caseload**

My Caseload

+ Add Transfer

PARTICIPANT	START DATE	TAKE ACTION
No records to display.		

**Recent TouchPoints**

My Recent TouchPoints

Take Action	TouchPoint	Dashboard Collection	Program	Name	Subject Type	Status	Date Completed	Date Last Updated

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## Search Functions: *Searching Within a Program*

The screenshot shows the Arlington Virginia DHS-Clinical Coordination Program Coordinated Entry (CE) search interface. The search bar contains the text "Fake". The search results show "Matches for: Fake" and "Total Participants: 0". The interface includes a navigation menu on the left, a top header with the Arlington Virginia logo and program name, and a search bar with a "SEARCH" button. The search results are displayed in a table with a "FILTERED BY" section and a "10 items per page" dropdown. A red box highlights a message:

**If no results are found when searching within the Program, then client is not currently enrolled.**

**Next step is to search within the Site**

**Note: If a participant has been dismissed, searching within the Site is the only way to access the participant's record**

# Search Functions: *Searching Within a Site*

The screenshot shows the Arlington Virginia HMIS interface. At the top, the user is logged in as 'DHS-Clinical Coordination Program Coordinated Entry (CE)'. The search bar contains the text 'Fake'. The search filters are set to 'Within Participants' and 'In Coordinated Entry (CE)'. A dropdown menu is open, showing two options: 'Coordinated Entry (CE)' and 'DHS-Clinical Coordination Program(C)'. A red arrow points from a callout box to the 'DHS-Clinical Coordination Program(C)' option. The callout box contains the text: 'Search within the Site' and 'Note: Site name will be accomodated with a "(C)". For example: DHS (C)'. The main content area is divided into 'Take Action' and 'Reports' sections. The 'Take Action' section includes links for 'View Pending Referrals', 'Enroll from a Program in this Site', 'Enroll from another Site', 'Add a New Household', 'Add/Edit Families', 'View/Edit Demographics', 'Complete/Review Client TouchPoints', 'Refer Participants', and 'Dismiss Participants'. The 'Reports' section includes links for 'Currently Active Participants', 'Review Participant Efforts (Individual)', 'Check for Duplicates', and 'HMIS Data Set'. At the bottom, there are sections for 'My Caseload' and 'Recent TouchPoints'. The 'My Caseload' section shows a table with columns for 'PARTICIPANT', 'START DATE', and 'TAKE ACTION', and a message 'No records to display.'. The 'Recent TouchPoints' section shows a table with columns for 'Take Action', 'TouchPoint', 'Dashboard Collection', 'Program', 'Name', 'Subject Type', 'Status', 'Date Completed', and 'Date Last Updated'. The footer includes the Social Solutions logo, copyright information '© 2001-2022 Developed by Social Solutions Global, Inc.', and social media icons for Twitter, Facebook, Instagram, YouTube, LinkedIn, and Messenger.

# Search Functions: *Searching Within a Site*

Quick Search Results

Matches for: Fake  
Total Participants: 12

FILTERED BY  
Last Name

PARTICIPANT NAME	SSN	CASENUMBER	SITEENROLLMENT
<a href="#">Fake, Ahmad</a>	999-99-9999		Currently not enrolled in any programs in site
<a href="#">Fake, Andrew</a>	999-99-9999		Currently enrolled in site
<a href="#">Fake, Jane</a>	999-99-9999		Currently not enrolled in any programs in site
<a href="#">Fake, John</a>	999-99-9999		Currently not enrolled in any programs in site
<a href="#">Fake, Kristen</a>	999-99-9999		Currently enrolled in site
<a href="#">Fake, Lance</a>	999-99-9999		Currently not enrolled in any programs in site
<a href="#">Fake, Lee</a>	999-99-9999		Currently not enrolled in any programs in site
<a href="#">Fake, March</a>	999-99-9999		Currently enrolled in site
<a href="#">Fake, Norman</a>	999-99-9999	53408	Currently not enrolled in any programs in site
<a href="#">Fake, Paxton</a>	999-99-9999	54037	Currently enrolled in site
<a href="#">Fake, RegINETTE</a>	999-99-9999	52943	Currently not enrolled in any programs in site
<a href="#">Fake, Test</a>	999-99-9999	53918	Currently enrolled in site

100 items per page 1 - 12 of 12 items

10 items per page 1 - 1 of 1 items

Click on a participant's name to access their dashboard, touchpoints, etc.

Searching within the site will also list previously enrolled clients. Searching within the program will only list currently enrolled clients.



# Search Functions: Searching Outside Current Site/Program

The screenshot displays the Social Solutions software interface. At the top, the header includes the Arlington Virginia logo, the program name 'DHS-Clinical Coordination Program Coordinated Entry (CE)', and navigation icons for 'CHANGE', 'REPORTING', and 'MESSAGES'. A search bar contains the text 'Fake' and is set to search 'Within Participants' in 'Coordinated Entry (CE)'. A sidebar on the left lists various navigation options such as 'To-Do List', 'New', 'My Favorites', 'My Calendars', 'Help', 'Participants', 'Participant History', 'Referrals & Housing', 'Referrals', 'My Work', 'Entities', 'TouchPoints', 'Reports', 'Wizards', 'Marketplace', 'ETO Insight', 'Program Administration', 'Site Administration', 'Enterprise', and 'Connect'. The main content area is divided into 'Take Action' and 'Reports' sections. The 'Take Action' section contains several buttons, with 'Enroll from another Site' highlighted by a red box and a red arrow pointing to it. A red callout box contains the text: 'Search using "Enroll from another Site" This will search the entire system outside of your current Site/Program'. Below this, there are sections for 'My Caseload' (showing 'No records to display') and 'Recent TouchPoints' (showing a table with columns: Take Action, TouchPoint, Dashboard Collection, Program, Name, Subject Type, Status, Date Completed, Date Last Updated). The footer includes the Social Solutions logo, copyright information '© 2001-2022 Developed by Social Solutions Global, Inc.', and social media icons for Twitter, Facebook, Instagram, YouTube, LinkedIn, and a chat icon.

# Enroll Existing Household

**Enrolling a participant who is currently enrolled in a program within your Site.  
\*Clients processed through different programs provided by the same provider.**

**Enrolling a participant from outside your current Site (another CoC partner).**

**My Caseload**

PARTICIPANT	START DATE
No records to display.	

**Recent TouchPoints**

Take Action	TouchPoint	Dashboard Collection	Program	Name	Subject Type	Status	Date Completed	Date Last Updated	Audit Creation Date	Last Updated By	Attributed Staff Name	Identifier
	Assessment	PIT	Unsheltered	[REDACTED]	Participant		1/26/2022	2/23/2022	2/23/2022	[REDACTED]		PIT Unsheltered
	Assessment	PIT	Unsheltered	[REDACTED]	Participant		1/26/2022	2/23/2022	2/23/2022	[REDACTED]		PIT Unsheltered
	Assessment	PIT	Unsheltered	[REDACTED]	Participant		1/26/2022	2/23/2022	2/23/2022	[REDACTED]		PIT Unsheltered
	Assessment	PIT	Unsheltered	[REDACTED]	Participant		1/26/2022	2/23/2022	2/23/2022	[REDACTED]		PIT Unsheltered
	Assessment	PIT	Unsheltered	[REDACTED]	Participant		1/26/2022	2/23/2022	2/23/2022	[REDACTED]		PIT Unsheltered
	Assessment	PIT	Unsheltered	[REDACTED]	Participant		1/26/2022	2/23/2022	2/23/2022	[REDACTED]		PIT Unsheltered

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# Create New Household

**Take Action**

- View Pending Referrals
- Enroll from a Program in this Site
- Enroll from another Site
- Add a New Household**
- Add/Edit Families
- View/Edit Demographics
- Complete/Review Client TouchPoints
- Refer Participants
- Dismiss Participants

**Reports**

- Currently Active Participants
- Review Participants
- Full a New

**Note:**

- \*Please make sure to properly search the system for the participant you are intending to create.
- \*If you do not find the participant in the system, you may then create a new household.

**Please avoid creating any duplicates in the system.**

**My Caseload**

PARTICIPANT	START DATE
No records to display.	

**Recent TouchPoints**

Take Action	TouchPoint	Dashboard Collection	Program	Name	Subject Type	Status	Date Completed	Date Last Updated	Audit Creation Date	Last Updated By	Attributed Staff Name	Identifier
👁️ 🗑️	PIT Assessment		PIT Unsheltered	[REDACTED]	Participant		1/26/2022	2/23/2022	2/23/2022	[REDACTED]		PIT Unsheltered
👁️ 🗑️	PIT Assessment		PIT Unsheltered	[REDACTED]	Participant		1/26/2022	2/23/2022	2/23/2022	[REDACTED]		PIT Unsheltered
👁️ 🗑️	PIT Assessment		PIT Unsheltered	[REDACTED]	Participant		1/26/2022	2/23/2022	2/23/2022	[REDACTED]		PIT Unsheltered
👁️ 🗑️	PIT Assessment		PIT Unsheltered	[REDACTED]	Participant		1/26/2022	2/23/2022	2/23/2022	[REDACTED]		PIT Unsheltered
👁️ 🗑️	PIT Assessment		PIT Unsheltered	[REDACTED]	Participant		1/26/2022	2/23/2022	2/23/2022	[REDACTED]		PIT Unsheltered

## Create New Household: *Demographics*

ARLINGTON VIRGINIA

CHANGE REPORTING MESSAGES

Within Participants In [Redacted] SEARCH

### Add Family

\* Indicates Required Field

Click to Add Family Member by Family Relationship ▾

- [Aunt/Uncle](#)
- [Brother](#)
- [Child](#)
- [Foster Child](#)
- [Foster Parent](#)
- [Grand Child](#)
- [Grandparent](#)
- [Legal Guardian](#)
- [Non-married Partner](#)
- [Other Family](#)
- [Parent](#)
- [Self/Head of Household](#)
- [Sibling](#)
- [Sister](#)
- [Spouse](#)
- [Step Parent](#)
- [Other](#)

\* Start Date  
06/02/2022

Save

**Please identify the participant's relationship.**

**Note:**  
\*For families, at least one of the family members from the household must be identified as a "Self/Head of Household."  
\*For singles, the client must be identified as "Self/Head of Household."

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## Create New Household: *Demographics*

**Please place a check mark in the "Head of Household" box for the family member identified as the head of household.**


**You must complete the required fields in order to save the participant's demographics page.**

**\*List of required items:**

- 1) First Name
- 2) Last Name
- 3) Name Data Quality (HUD)
- 4) SSN Quality (HUD)
- 5) DOB Quality (HUD)
- 6) Gender (HUD)
- 7) Primary Language Spoken
- 8) Race (HUD)
- 9) Ethnicity (HUD)
- 10) Veteran Status (HUD)

**\*\*DO NOT SELECT DATA NOT COLLECTED  
Client Refused/Doesn't Know are valued answers.**

# Mandatory HMIS TouchPoints



ARLINGTON VIRGINIA

- To-Do List
- New
- My Favorites
- My Calendars
- Help
- Participants
- Participant History
- Referrals & Housing
- Referrals
- My Work
- Entities
- TouchPoints
  - Record TouchPoints
  - View Family TouchPoints
  - View General TouchPoints
  - View Participant TouchPoints
- Reports
- Wizards
- Marketplace

CHANGE REPORTING MESSAGES

Search Term(s)... Within Participants In SEARCH

## Record TouchPoint

Select TouchPoint:

- Select a TouchPoint --
- 1010 Assessment
- Arlington County Acknowledgement of Privacy Practices (HIPAA)
- Arlington County Authorization For Release Of Protected Health Information (ROI)
- Arlington County CoC Participant/Applicant Bill of Rights
- Arlington County Shared Authorization to Use and Exchange Information
- CAS - PSH Referral
- CAS - RRH Referral
- Forms of ID
- Full Family 2.01 SPDAT
- Full Single 4.01 SPDAT
- HUD Assessment (Entry/Update/Annual/Exit)
- Multiparty Release of Information (ROI)
- Notice of Privacy Practices
- PIT Assessment
- Services Provided (Case Notes)

**Mandatory HMIS TouchPoints for all CoC programs:**

- > HUD Assessment (Entry/Update/Annual/Exit)
- > Services Provided (Case Notes)



# Mandatory HMIS TouchPoints: HUD Assessments (Entry/Update/Annual/Exit)

- ☰
- 🏠
- ARLINGTON VIRGINIA
- ☰ To-Do List
- 📄 New
- ★ My Favorites
- 📅 My Calendars
- > Help
- > Participants
- > Participant History
- > Referrals & Housing
- > Referrals
- > My Work
- > Entities
- ☑ TouchPoints
  - Record TouchPoints
  - View Family TouchPoints
  - View General TouchPoints
  - View Participant TouchPoints
- > Reports
- > Wizards
- > Marketplace

\*Please make sure to be in the correct Site and Program\*

CHANGE    REPORTING    MESSAGES    [Redacted]

Search Term(s)...    Within Participants    In [Redacted]    SEARCH

HUD Assessment (Entry/Update/Annual/Exit) for [Redacted] on 6/3/2022

Populate with previous response: -- Select --

Use this function to auto-populate the current assessment with previously completed values

Select the latest assessment to be used when populating the data

*Does not populate the entire assessment*

Identifier: [Redacted]

PAGE #1. Universal Information    PAGE #2. Living Situation    PAGE #5. Income and Benefits    PAGE #6. Health Insurance    PAGE #7. Health Information

A-1. At what point is this data being collected? \*

Project Start  
-- Select --  
**Project Start**  
Project Update  
Project Annual Assessment  
Project Exit

**Project Start:** Completed at entry into the Program

**Project Update:** Completed if there is a change in *Income* or *Health* within the year

**Project Annual Assessment:** Completed a day after the anniversary date of entry into the program

**Project Exit:** Completed at exit from the Program

*HUD Assessments are required for all households*

A-4. What is the client's relationship to the head of household? \*

Self (head of household)

A-5. Continuum Code - HUD-assigned CoC Codes for this Project's Location

VA-600

# Mandatory HMIS TouchPoints: *Services Provided (Case Notes) & Forms of ID*

## Services Provided (Case Notes)

Services Provided (Case Notes) for  on

First Page

Contact Location / Method  
-- Select --

Date of Contact \*

Services Provided  
-- Select --

Notes \*

## Forms of ID

Forms of Identification

**Forms of ID**  
Please attach all required documents.

**Picture ID, SSN Card (printout), and Proof of Arlington Residency (all are required):**

Picture ID:

SSN Card (printout):

Proof of Arlington Residency:

**Birth Certificate, Certificate of Naturalization, Passport, Alien Registration (at least one of these is required):**

U.S. Issued Birth Certificate:

U.S. Certificate of Naturalization:



# Mandatory HMIS TouchPoints: *Additional Assessments based on Project Types*

## Coordinated Entry (CE)

ARLINGTON VIRGINIA

DHS-Clinical Coordination Program  
Coordinated Entry (CE)

CHANGE REPORTING MESSAGES

Search Term(s)... Within Participants In Coordinated Entry (CE) SEARCH

Record TouchPoint

Select TouchPoint:

- Select a TouchPoint --
- Select a TouchPoint --
- 1010 Assessment
- Arlington County Acknowledgement of Privacy Practices (HIPAA)
- Arlington County CoC Participant/Applicant Bill of Rights
- Arlington County Shared Authorization to Use and Exchange Information
- Bed and Unit Inventory Information
- CAS - PSH Referral
- CAS - RRH Referral
- Coordinated Entry Assessment**
- Coordinated Entry Event**
- Financial Assistance
- Financial Assistance Provided (HOPWA or SSVF)
- Forms of ID
- Full Family 2.01 SPDAT
- Full Single 4.01 SPDAT
- Gross Annual Income Worksheet
- HUD Assessment (Entry/Update/Annual/Exit)
- Multiparty Release of Information (ROI)
- Notice of Privacy Practices
- PIT Assessment

Assessments must be completed in order to populate Coordinated Entry APR (CE-APR)

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# Mandatory HMIS TouchPoints: *Additional Assessments based on Project Types*

## Treatment on Wheels (TOW) – PATH

The screenshot displays the 'Record TouchPoint' interface in the HMIS system. The dropdown menu lists various touchpoints, with the following items highlighted in red:

- Outreach and Services Contact
- Outreach and Services Engagement
- Referrals Provided (PATH)
- Services Provided (HOPWA, PATH, RHY, or SSVF)

A callout box with a red border and pointer contains the text: **Assessments must be completed to accurately report performance outcomes in the PATH report**.

The interface also shows the 'ARLINGTON VIRGINIA' logo, 'DHS DHS-Treatment on Wheels (TOW)' header, and a sidebar menu with options like 'Participants', 'Participant History', 'Referrals & Housing', 'My Work', 'Entities', 'TouchPoints', 'Reports', 'Wizards', 'Marketplace', 'ETO Insight', 'Program Administration', 'Site Administration', 'Enterprise', and 'Connect'.

# HMIS Bed List: *Check In*

**Expand to select bed**

**Click to add participant to bed**

**Housing Check-In**

		Participant	Case #	DOB	Sex	Notes	Take Action
Bed 1	Add Participant to Bed 1	N/A					<a href="#">Manage</a>
Bed 2	Add Participant to Bed 2	N/A					<a href="#">Manage</a>
Bed 3	Add Participant to Bed 3	N/A					<a href="#">Manage</a>
Bed 4	Add Participant to Bed 4	N/A					<a href="#">Manage</a>
Bed 5	Add Participant to Bed 5	N/A					<a href="#">Manage</a>
Bed 6	Add Participant to Bed 6	N/A					<a href="#">Manage</a>
Bed 7	Add Participant to Bed 7	N/A					<a href="#">Manage</a>
Bed 8	Add Participant to Bed 8	N/A					<a href="#">Manage</a>
Bed 9	Add Participant to Bed 9	N/A					<a href="#">Manage</a>
Bed 10	Add Participant to Bed 10	N/A					<a href="#">Manage</a>
Bed 11	Add Participant to Bed 11	N/A					<a href="#">Manage</a>
Bed 12	Add Participant to Bed 12	N/A					<a href="#">Manage</a>
Bed 13	Add Participant to Bed 13	N/A					<a href="#">Manage</a>
Bed 14	Add Participant to Bed 14	N/A					<a href="#">Manage</a>

**Housing Check-In**

**Housing Check-Out**

**Manage Rooms**

**Manage All Rooms HMIS**

**My Work**

**Entities**

**TouchPoints**

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# HMIS Bed List: *Check Out*

- ☰
- 🌐
- ARLINGTON VIRGINIA
- ☰ To-Do List
- 📄 New
- ★ My Favorites
- 📅 My Calendars
- > Help
- > Participants
- > Participant History
- ✓ Referrals & Housing
  - Add Referral (Legacy)
  - Multiple Participant Referrals (Legacy)
  - View/Edit Referrals (Legacy)
  - View Pending Referrals (Legacy)
  - Housing Check-In
  - Housing Check-Out**
  - Manage Rooms
  - Manage All Rooms HMIS
- > My Work
- > Entities
- > TouchPoints

CHANGE REPORTING MESSAGES

Search Term(s)... Within Participants In SEARCH

Housing Check-Out

Check-Out Participants

Select All Rows

<input type="checkbox"/>	Occupant	Unit	Room	Occupancy Start Date	Check-Out Date
<input type="checkbox"/>					
<input type="checkbox"/>		Male	Bed 21		
<input type="checkbox"/>		Male	Bed 36		
<input type="checkbox"/>		Male	Bed 33		

Place a check mark by the name and enter the Check-Out Date

Save to complete check-out

*Check-Out date must match Exit date*





# HMIS Bed List: *Manage*



Search Term(s)...

Within

Participants

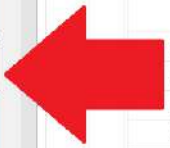
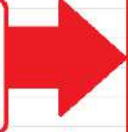
In

SEARCH

## Manage All Rooms HMIS

Unit		Beds Available					
1.	Male	36					
		Beds Available	Beds Filled	Beds Reserved	% Filled/Reserved	Attributes	Take Action
1.	Bed 1	1	0	0	0.00%		Manage
2.	Bed 2	1	0	0			Manage
3.	Bed 3	1	0	0			Manage
4.	Bed 4	1	0	0			Manage
5.	Bed 5	1	0	0			Manage
6.	Bed 6	1	0	0	0.00%		Manage
7.	Bed 7	1	0	0	0.00%		Manage
8.	Bed 8	1	0	0	0.00%		Manage
9.	Bed 9	1	0	0	0.00%		Manage
10.	Bed 10	1	0	0	0.00%		Manage
11.	Bed 11	1	0	0	0.00%		Manage
12.	Bed 12	1	0	0	0.00%		Manage
13.	Bed 13	1	0	0	0.00%		Manage
14.	Bed 14	1	0	0	0.00%		Manage
15.	Bed 15	1	0	0	0.00%		Manage
16.	Bed 16	1	0	0	0.00%		Manage
17.	Bed 17	1	0	0	0.00%		Manage
18.	Bed 18	1	0	0	0.00%		Manage
19.	Bed 19	1	0	0	0.00%		Manage
20.	Bed 20	1	0	0	0.00%		Manage
21.	Bed 21	1	1	0	100.00%		Manage
Occupant		Enrolled	DOB	Age (yrs.)	Occupancy Start	Reservation Start	
1.							
22.	Bed 22	1	0	0	0.00%		Manage
23.	Bed 23	1	0	0	0.00%		Manage
24.	Bed 24	1	0	0	0.00%		Manage
25.	Bed 25	1	0	0	0.00%		Manage
26.	Bed 26	1	0	0	0.00%		Manage
27.	Bed 27	1	0	0	0.00%		Manage
28.	Bed 28	1	0	0	0.00%		Manage

Select the bed to Take Action/Manage  
Able to edit date of check-in or out, delete bed stay, add participant to bed



- To-Do List
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  - TouchPoints

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🔍 Search Term(s)... Within Participants In SEARCH

Manage All Rooms HMIS <<Back to List [Edit History](#)

**Male: Bed 1**

Attributes:	
Beds Available:	1
Beds Filled:	0
% Filled/Reserved:	0.00%



This does not have a history of occupants.

[Add New Occupant\(s\)](#)



# HMIS Bed List: *Manage*

- To-Do List
- New
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CHANGE

REPORTING

MESSAGES

Within
Participants
In

SEARCH

**Manage Room History** Return to Manage Rooms

**Male: Bed 1**  
 Attributes:  
 Beds Available: 1  
 Previous Occupants/Reservations:

Occupant	DOB	Age (yrs)	Occupancy Start	Reservation Date	Occupancy End	Delete
1		42				<input type="checkbox"/>
2		42				<input type="checkbox"/>
3		62				<input type="checkbox"/>
4		73				<input type="checkbox"/>
5		53				<input type="checkbox"/>
6		54				<input type="checkbox"/>
7		44	8/18/2021		9/9/2021	<input type="checkbox"/>
8		62				<input type="checkbox"/>
9		73				<input type="checkbox"/>
10		76				<input type="checkbox"/>
11		66				<input type="checkbox"/>
12		57				<input type="checkbox"/>
13		33				<input type="checkbox"/>
14		70				<input type="checkbox"/>
15		57				<input type="checkbox"/>
16		53				<input type="checkbox"/>
17		55				<input type="checkbox"/>
18		60				<input type="checkbox"/>

**Managing Bed History:**

- > Edit Start & End dates
- > Delete bed stay

Click submit to save changes

Submit

## Dismissals/Project Exit: HUD Assessment at Exit

The screenshot displays the 'Record TouchPoint' interface in the Social Solutions Global system. The dropdown menu is open, showing a list of touchpoint categories. The 'HUD Assessment (Entry/Update/Annual/Exit)' option is highlighted. A red callout box points to this option with the text: **Must be completed for ALL clients exiting a program. Must be completed to avoid validation report errors.**

ARLINGTON VIRGINIA

CHANGE REPORTING MESSAGES

Search Term(s)...

Within Participants In

SEARCH

Record TouchPoint

Select TouchPoint:

- Select a TouchPoint --
- Coordinated Entry Event
- Financial Assistance
- Financial Assistance Provided (HOPWA or SSVF)
- Forms of ID
- Full Family 2.01 SPDAT
- Full Single 4.01 SPDAT
- HUD Assessment (Entry/Update/Annual/Exit)**
- Leasing Violations
- Multiparty Release of Information (ROI)
- Notice of Privacy Practices
- Outreach and Services Contact
- Outreach and Services Engagement
- PIT Assessment
- Project Descriptor Data Elements
- PSH Assessment
- PSH Home Visit
- Reference Attachments
- Referrals Provided (PATH)
- Service Plan Upload
- Services Provided (Case Notes)

Must be completed for ALL clients exiting a program. Must be completed to avoid validation report errors.

Home To-Do List New My Favorites My Calendars Help Participants Participant History Referrals & Housing Referrals My Work Entities TouchPoints Record TouchPoints View Family TouchPoints View General TouchPoints View Participant TouchPoints Reports Wizards Marketplace ETO Insight

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# Dismissals/Project Exit: *Reasons for Dismissal*

**Step 1: Click here**

Please verify that the DOB, SSN and Case Number belong to the client you intend to dismiss, prior to dismissing them.

Select a dismissal reason

Finalizes the dismissal

AGE	CASE NUMBER	DOB	SSN
22	52944	1/1/2000	999-99-9999
33	53917	1/6/1989	
	54035		
	54037		
	53916		

**PARTICIPANT**

- Select —
- Absent without leave (AWOL)
- Client no show
- Client not engaged within the past 30 days
- Criminal Activity/Destruction of Property/Violence
- Death
- Declined shelter placement/Remained homeless
- Declined shelter placement/Resolved own situation
- Discharged for Non-Compliance
- Entered AAF
- Entered b2i Sullivan House
- Entered Doorways Family Home
- Entered HSC
- Entered RPC
- Evasion
- Exit to Permanent Housing
- Foster Care
- Graduated AAF
- Hospitalization
- Incarceration

Dismissal Reason: -- Select --

Dismiss Participant

# Built for Zero (BFZ): *Enroll*

**Enterprise, Sites & Programs**

Search...

**DHS**

- Arlington Zero: Chronic - Veterans Only
- Arlington Zero: Families
- Arlington Zero: Single Adults
- Arlington Zero: TAY

Click on the top banner to change program then select DHS

Select the appropriate BFZ program to enroll

My Caseload

PARTICIPANT	START DATE	TAKE ACTION
No records to display.		

Recent TouchPoints

Take Action	TouchPoint	Dashboard	Collection	Program	Name	Subject Type	Status	Date Completed	Date Last Updated	Audit Creation Date	Upd

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# Built for Zero (BFZ): *Enroll*



DHS  
Arlington Zero: Chronic - Veterans Only

CHANGE

REPORTING

MESSAGES



Search Term(s)...

Within

Participants

In

Arlington Zero: Chronic - Veterans Only

SEARCH

HMIS

## Take Action

- [View Pending Referrals](#)
- [Enroll from a Program in this Site](#)
- [Enroll from another Site](#)
- [Add a New Household](#)
- [Add/Edit Families](#)
- [View/Edit Demographics](#)
- [Complete/Review Client TouchPoints](#)
- [Refer Participants](#)
- [Dismiss Participants](#)

## Reports

- [Currently Active Participants](#)  
Provides a list of all active clients and how many days they have been enrolled in the program.
- [Review Client Progress \(Individual\)](#)  
View the progress of an individual and a graphic depiction of progress.
- [Check for Duplicates](#)  
Looks for possible duplicated participants. This is based on criteria set by your ETO Administrator
- [HMIS Data Set](#)  
Pull a New HMIS Data Set to run HMIS reports



### My Caseload



+ Add   Transfer

PARTICIPANT	START DATE	TAKE ACTION
No records to display.		

### Recent TouchPoints



#### My Recent TouchPoints

Take Action	TouchPoint	Dashboard	Collection	Program	Name	Subject Type	Status	Date Completed	Date Last Updated	Audit Creation Date	Upd
	[Redacted]										

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# Built for Zero (BFZ): *Dismiss*

- Home
- To-Do List
- New
- My Favorites
- My Calendars
- Help
- Participants
  - Duplicated Participants
  - Enterprise Enroll
  - Find Participant
  - View Participant Info
  - View/Edit Participant
  - Enroll Participants
  - Dismiss Participants
  - Dismiss Participants by Date
  - View/Edit Families
- Participant History
- Referrals & Housing
- Referrals
- My Work
- Entities
- TouchPoints
- Reports
- Wizards

DHS  
Arlington Zero: Chronic - Veterans Only

CHANGE REPORTING MESSAGES



Search Term(s)...

Within Participants In Arlington Zero: Chronic - Veterans Only

SEARCH

## Dismiss Participants from Arlington Zero: Chronic - Veterans Only

Search for Participants in DHS by last name and/or first name, Social Security Number, case number, or family name. To see all Participants leave the boxes empty.  
1. Enter search criteria. 2. Select participant(s) to dismiss. 3. Enter dismissal information; if multiple participants are selected with different dates, finish on the following page.

Last Name:

First Name:

or

SSN:

or

Case Number:

or

Family Name:

Search

Below are all Participants who are currently enrolled in Arlington Zero: Chronic - Veterans Only.

<input type="checkbox"/>	PARTICIPANT	AGE	CASE NUMBER	DOB	SSN
<input checked="" type="checkbox"/>	[REDACTED]	32	[REDACTED]	4/11/1990	[REDACTED]
<input type="checkbox"/>	[REDACTED]	62	[REDACTED]	6/17/1959	[REDACTED]
<input type="checkbox"/>	[REDACTED]	78	[REDACTED]	8/10/1943	[REDACTED]
<input type="checkbox"/>	[REDACTED]	74	[REDACTED]	5/12/1948	[REDACTED]
<input type="checkbox"/>	[REDACTED]	75	[REDACTED]	10/26/1946	[REDACTED]
<input type="checkbox"/>	[REDACTED]	58	[REDACTED]	4/3/1964	[REDACTED]



Page size: 25 7 items in 1 pages

Program End Date:

Dismissal Reason: -- Select --

Successfully Completed:

Dismiss Participant

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