

MINER HMIS EFSP CRITICAL PROCEDURES

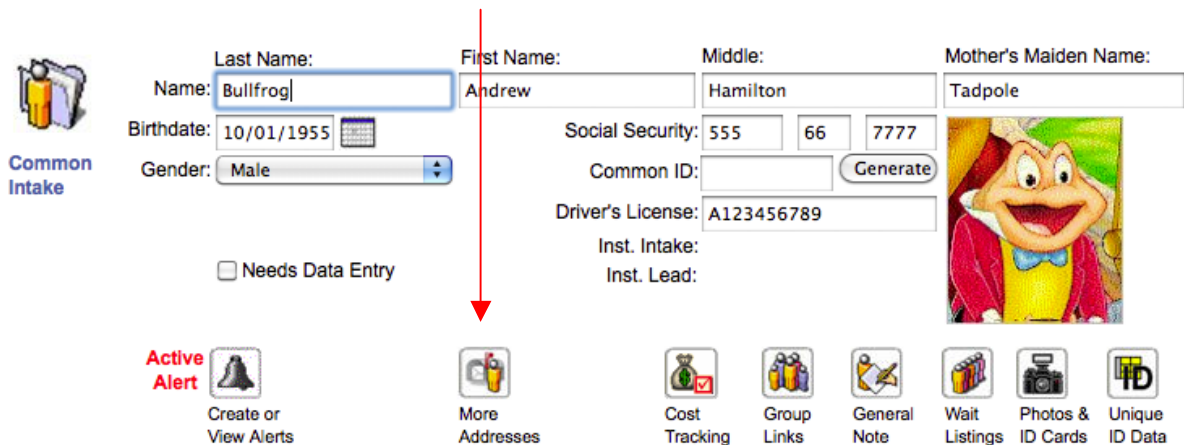
The following procedures are critical additions to HMIS General Intake and are specific to the Emergency Food and Shelter Program.

NOTE: The steps listed below are completed AFTER you have found or created the Client file in HMIS. Refer to the HMIS General Intake Manual at www.miner-hmis.com for full instructions on Client Intake.

ENTER CONTACT RECORDS FOR CLIENT

A current address is required for all EFSP Head of Household clients being entered into HMIS.

From the Client Summary screen (default screen after creating or accessing a Client Record), click the "More Addresses" button to enter an address for the client. If this was an existing client, previous addresses may be listed on this page.




Click "New Address" from the Address page, to present the Address Intake form below.

Address:

9101 W. Sahara Ave #105-158
Las Vegas, NV 89117

telephone: (702) 614-6690
fax: (702) 666-9102

email: info@bitfocus.com
web: www.bitfocus.com



Client Address Record

Address Information:

Name:

Street:

City:

State: Zip:

Address Type:

Current Address:

First Use of This Address:

Contact Information:

Phone # 1: () - Ext.: Phone # 2: () - Ext.:

Description:

Phone # 3: () - Ext.: Phone # 4: () - Ext.:

Description:

E-Mail Addr:

URGENT NOTICE: Set the ADDRESS TYPE, and set CURRENT ADDRESS with a CHECK. Also be sure to complete all information available, including Email Address.

ADDING A COST TO EFSP SERVICES

Within HMIS, you have the ability to add and track individual service costs. To meet reporting needs, this feature is critical for EFSP and all items below **MUST** be entered.

NOE: The following information is entered **AFTER** placing the Client with a service. Refer to the General Training Manual for assistance with service placements.

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From the Placement Confirmation Screen, enter the Charge Amount and Charge Date. Then Click the Money Bag Icon to access the Cost Detail Screen.

Client has been Placed to:

Placement Confirmation

Title: [EFSP] Utilities

Section: MTR Lead Staff: Admin, Demo


Start Date: 04/01/2010 End Date: 04/30/2010

Provider: Bitfocus Demo Account

Service Type: Income Source

Edit History Record
 Check-In Later [Via Attendance Roster]

Check-In Now [For Current Date]

View and Edit Service Costs:  **Auto-Charge** Charge: 257.64 Charge Date: 04/01/2010

Cancel Auto Charge
 Unless Adjusted or Cancelled. Amount will be Charged to Funding Source.
 to Funding Source: **EFSP -**

On the Cost Detail screen, click the File Folder to open the Service Charge Record.

Service Charges [Click Column Titles to Sort] 1 Records

Date	Description of Charge	Amount
04/01/2010	[EFSP] Utilities - FS EFSP	\$257.64

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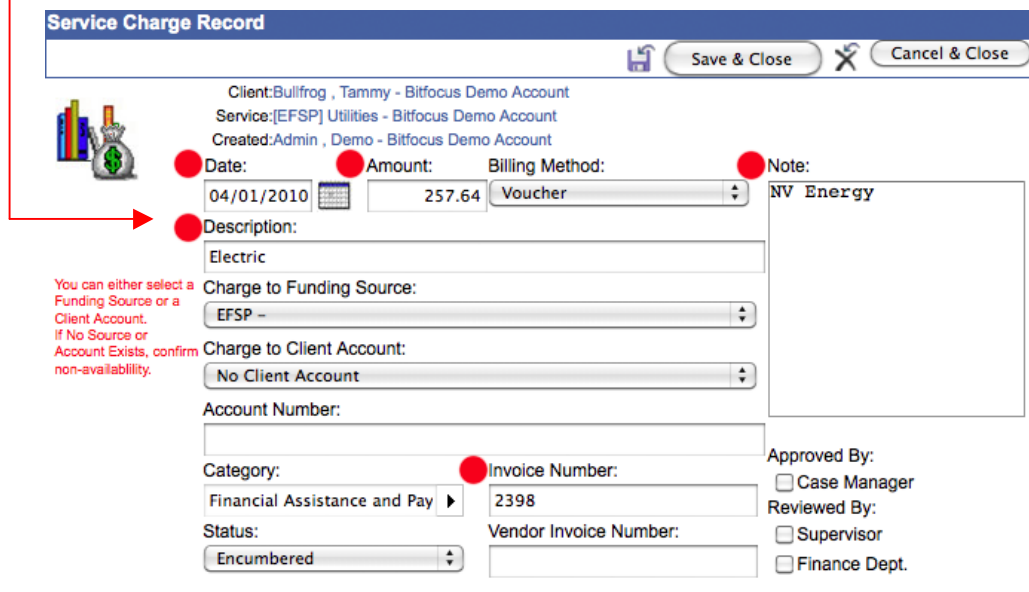
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For all EFSP services, enter the following critical items on the Service Charge Record:

- Date Field – Enter the Check Date
- Note Field - Enter the Vendor Name (store, utility company, etc)
- Invoice Number – Enter the Check Number
- Verify that the Amount is correct and that the Funding Source is set to EFSP

FOR UTILITIES ONLY:

- Description Field – Replace current description with the type of utility being provided (Propane, Coal, Wood, Gas, Electric, Water, Other).



Service Charge Record

Client: Bullfrog, Tammy - Bitfocus Demo Account
 Service: [EFSP] Utilities - Bitfocus Demo Account
 Created: Admin, Demo - Bitfocus Demo Account

Approved By: Case Manager
 Reviewed By: Supervisor
 Finance Dept.

You can either select a Funding Source or a Client Account. If No Source or Account Exists, confirm non-availability.

Then click Save & Close.

These critical procedures, along with general HMIS intake, will insure proper reporting for your Emergency Food and Shelter Program.

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RUNNING THE EFSP REPORT

Lead Staff Members should be running the EFSP report on a regular basis to insure that all clients are being reflected properly.

- In the Common Tool area located at the top of each screen, click the Reports icon.




The Report Library will be displayed.


- Enter EFSP in the Search Settings and click Start Search.

Search Settings:

Text in Title or Description: Report Category: System Location:

 Start Search

- Choose the EFSP Report by clicking on the File Folder icon.

	Report Title	Category	Report Description
	Agency - EFSP Report	All	Emergency Food & Shelter Report

Address:

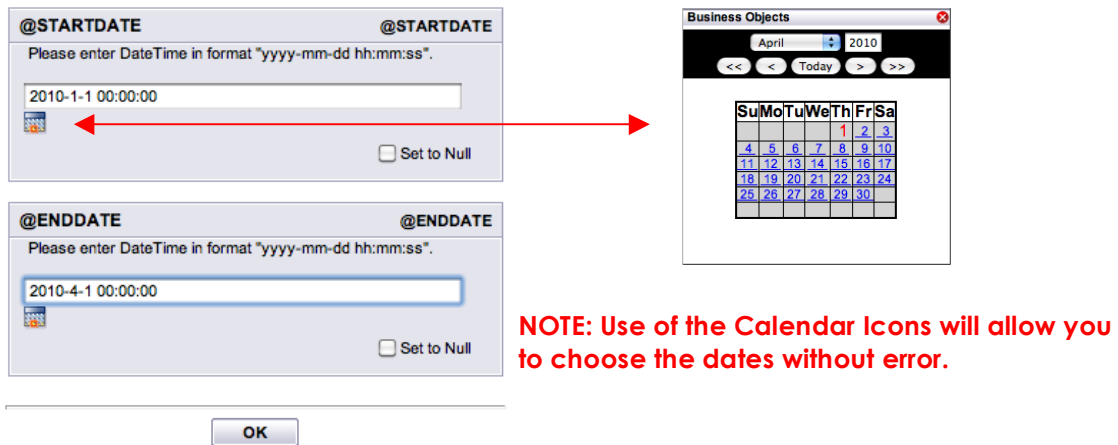
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- Enter a Start and End Date for the report.

Data will be pulled into the report for services placed during the date range entered.



NOTE: Use of the Calendar Icons will allow you to choose the dates without error.

- Click OK to begin processing the report.

The EFSP Report separates Client data as shown below.

SERVICE: [EFSP] Rent/Mortgage								
Location: EFSP-Rent								
Name	Address	Type	Vendor	Check No	Check Date	Month Pd	Amount	
Test, Baby	9101 W. Sahara Ave., Las Vegas, NV 89117	Gas	Southwest Gas	2343	03/23/2010	March	200.00	
Location Totals:							200.00	
Location: EFSP-Eviction								
Name	Address	Type	Vendor	Check No	Check Date	Month Pd	Amount	
Test, Baby	9101 W. Sahara Ave., Las Vegas, NV 89117		Vendor Example	3444	03/23/2010	March	100.00	
Location Totals:							100.00	
Service Totals:							300.00	
REPORT TOTAL:							1,418.50	

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