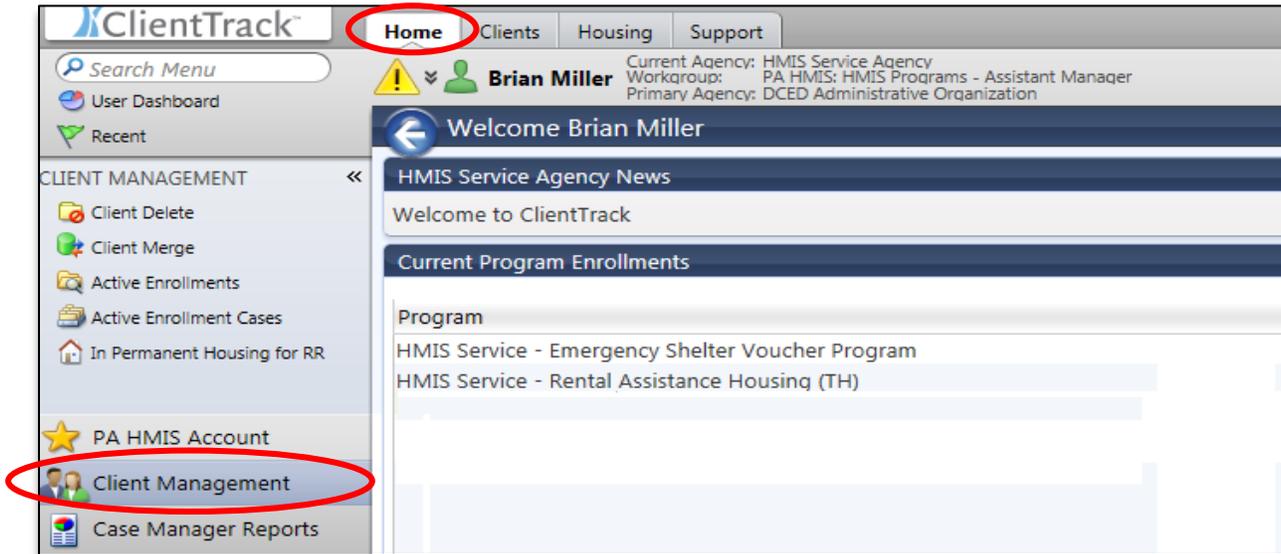
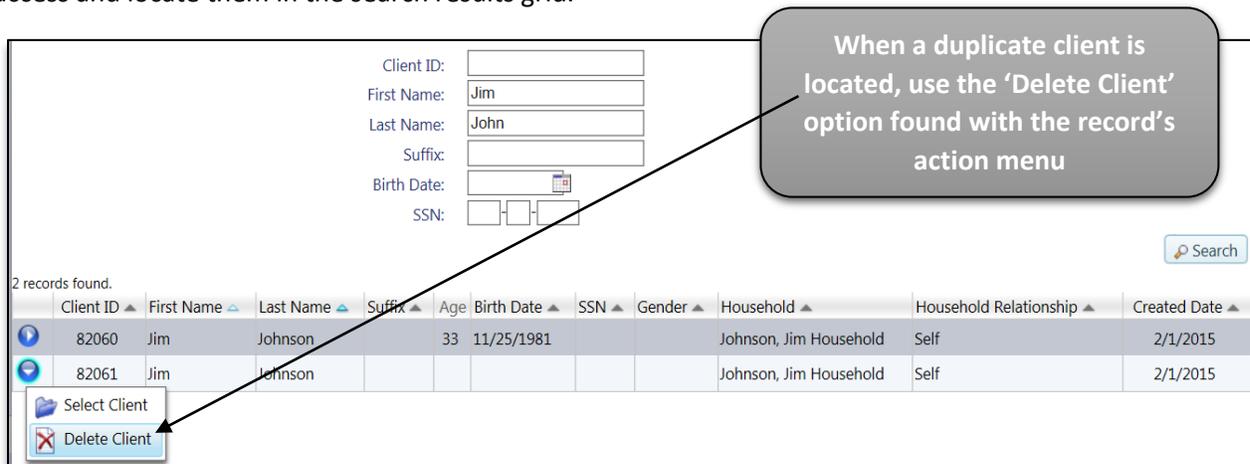


Client Management Tools Guide

The system now includes a Client Management folder, which includes a number of features that can assist in the management of each organization's client data, and are available to all users. This Client Management Toolkit can be found within the [Home](#) -> [Client Management](#) folder of the system within all Workgroups.



Client Delete: this tool will allow users to delete mistakenly created or duplicate entered clients from the system. When selecting this option the user can search for clients for which their organization has access and locate them in the search results grid.



The system will only allow users to delete clients in which only their organization has access, and if a client is also accessible by another organization, their record will not be available for deletion.

Please note that the delete option should only be used when a client was mistakenly entered and no data has yet been associated to the record. If a duplicate is found and program-based data exists in both records please refer to the Client Merge tool for assistance.

Active Enrollments: this tool allows users to search for and display all clients still actively enrolled in the programs they administer. To display actively enrolled clients, select a program from the list provided and the system will perform an automated search. You may also enter in an optional client name (Last, First) to minimize the results.

Search active enrollments by program

Client (Last, First):

Program: HMIS Service Agency - Transitional Housing Program

Search

6 records found.

| | Client (Last, First) ▲ | Enrollment ▲ | Enroll Date ▲ | Days Enrolled ▲ | Last Service ▲ | Active On Your Case Load ▲ |
|--|------------------------|--|---------------|-----------------|----------------|----------------------------|
| | Aaron, Henry | HMIS Service Agency - Transitional Housing Program | 01/06/2015 | 30 | 01/06/2015 | Yes |
| | Aaron, Kimberly | HMIS Service Agency - Transitional Housing Program | 01/06/2015 | 30 | 01/06/2015 | Yes |
| | Johnson, Jim | HMIS Service Agency - Transitional Housing Program | 01/22/2015 | 14 | | Yes |

Once a program is selected the system will display each client that has an active enrollment (enrollment that has no exit date). Each enrollment displays the client name, enrollment date, total days enrolled, the date of the last service and whether the client enrollment is active on your Case Load.

While running a report (Client Program Usage) is the standard method for providing active enrollments, this tool provides an interface from which to view this information. You can also select the icon, and the system load that client in the system and you will be automatically navigated to their dashboard for easy access.

Active Enrollment Cases: similar to the active enrollments, the active enrollment cases will display all the active households still actively enrolled in your programs. To display actively enrolled cases, select a program from the list provided and the system will perform an automated search. You may also enter in an optional household name to minimize the results.

Case/Household Name:

Program: HMIS Service Agency - Permanent Supportive Housing

2 records found.

| | Case/Household Name ▲ | Case Members ▲ | Program ▲ |
|--|-----------------------|----------------|--|
| | Parker, Peter | 1 | HMIS Service Agency - Permanent Supportive Housing |
| | Paxton, Leonard | 2 | HMIS Service Agency - Permanent Supportive Housing |

Once a program is selected the system will display each household case that has an active enrollment. Each enrollment case displays the household or case name and the number of household members associated to that case. You can also select the icon, and the system load that enrollment case's Head of Household client in the system, the icon will display all of the individual household members that are currently included in that case.

Please note a “Case” or “Enrollment Case” refers to a group of household members enrolled into the same program together during the same time period and is used heavily in reporting metrics specifically for household type (i.e. Adults Only, Adults and Children, etc.). When viewing your enrollment cases, if the case member number does not match the number of persons that should be enrolled together, please contact the PA HMIS helpdesk for assistance in correcting the issue.

Client Merge: the client merge tool allows for the locating and merging of multiple duplicate clients together into a single client record, the new version also allows for the checking and the merging of entire households in the system as well. Please refer to the stand-alone **Client Merge Guide** for more detailed information and instructions on using this tool.

In Permanent Housing for RR: this feature allows for the viewing and updating of the In Permanent Housing data element that is required to be collected and updated as needed for all rapid rehousing programs. Please refer to the stand-alone **In Permanent Housing Element Guide** for more details in the In Permanent Housing element and instructions on using this tool.