

CAA - HMIS Quick Steps effective April 1, 2018

New Client

1. Create a Client profile using your CAA HMIS User Profile or using the “Enter Data As” function and select Coordinated Access & Assessment.
2. Upload the CAA ROI.
3. Enter all the details in the following sections;
 - a. Client Record
 - b. Client Demographics
4. Enter the Needs & Services Questionnaire (VI-SPDAT) and enter all the details in the following sections;
 - a. Administration questions (Type, Survey Date, Date entered into ServicePoint, Interviewer’s Name, Agency)
 - b. All questions listed including score fields
 - c. Enter the scoring summary for each section (The scores do not auto populate).
 - d. Ensure to complete the following fields;
 - i. Suggested Program Type (applies only to the Singles/Adult Sector)
 - ii. Wrap-around supports (if applicable)
 - iii. Last date client checked-in
 - iv. Indicate if client currently residing a public system and estimated release date
 - e. Enter any pertinent information related to Placement Committee in the Notes section - if applicable
5. Enter a Case Note in the CAA goal for any additional, helpful information.
6. Create an Entry into CAA (only once the profile is complete with ROI, SPDAT, Score and elements noted above).

Returning Client

1. Find the Client profile using your CAA HMIS User Profile or using the “Enter Data As” function and select Coordinated Access & Assessment.
2. Verify the CAA ROI is valid and complete.
 - a. If the ROI is not valid, please upload a new ROI
3. Update the Needs & Services Questionnaire (VI-SPDAT) and score (The total score does not auto populate).
4. Review the following areas;
 - a. Suggested Program Type (applies only to the Singles/Adult Sector)
 - b. Wrap-around supports (if applicable)
5. Update – “Last date client checked-in”
6. Enter a Case Note in the CAA goal to describe the new situation or for any additional helpful information.
7. Create an Entry into CAA (only once the profile is complete with ROI and Needs & Services Questionnaire (VI-SPDAT)).