



Client Services Network v4.0

User Manual

Marin County (CA) HMIS

Table of Contents

Accessing CSN	3
First Time Login Procedures	3
Regular Login Procedures	3
Change Login Password / Reset Login Password	4
Things to Remember about Passwords	4
CSN Workgroup Home Page	5
Search Screens	5
Search Results	5
Menus and Buttons	6
Menu Bar	6
Client Data Screens	7
Client Demographics	7
Alias Information	7
Household Members	8
Program Entry	9
Client Program Open	10

Special Needs: Entry/Interim/Exit	11
Income: Entry/Interim/Exit	12
Notes	13
Program Exit	13
Client Program Close	13
Non-Financial Services (Supportive Services)	14
Printing Client Records	14

Accessing CSN

First Time Login Procedures

After accessing the CSN website, you will see the screen below.

Click on Login. The Login screen will appear.

Click on the User ID box. Type your User ID into the box.

Click on the Password box. Type the word, **PASSWORD**, into the Password box.

Click on the SUBMIT button.

The next screen you will see asks you to Change (original) Login Password.

User ID:

Password:

SUBMIT

Passwords must be at least eight (8) characters in length and contain at least three of the following character types:

Type 1: Upper case letters

Type 2: Lower case letters

Type 3: Numbers

Type 4: Characters (!@#\$%^&*?~)

Old Password:

New Password:

Verify New Password:

Submit **Cancel**

Regular Login Procedures

After you have logged in for the first time and changed your password, you simply follow steps 1 – 4 above (using your new password) to use the CSN application.

If your password is NOT accepted, you will see the message below. Click on the OK button. Repeat steps 1 - 4 above. The account is automatically locked out after three (3) unsuccessful attempts.



Change Login Password / Reset Login Password

Click on the Old Password box. Type in **PASSWORD**.

Click on the New Password box. Type in your new password. Passwords MUST be at least eight (8) characters in length and must contain at least three (3) of the following character types:

Upper case letters

Lower case letters

Numbers

Characters !@#\$%^&*?~()

When then minimum requirements are met, the password test notice will change from **Unacceptable** to **Acceptable**. If the password uses all four (4) character types, the notice changes to **Strong**.

Click on the Verify New Password box. Type in the same new password.

Click on the Submit button.

If your password is accepted, you will advance to agency and workgroup selection screen.

Passwords must be at least eight (8) characters in length and contain at least three of the following character types:

Type 1: Upper case letters

Type 2: Lower case letters

Type 3: Numbers

Type 4: Characters (!@#\$%^&*?~)

Old Password:

New Password: **Acceptable**

Verify New Password:

Things to Remember about Passwords

Your original password is valid for 30 days. You must login within that 30-day period and change it to a new password or it will expire.

Passwords MUST be at least eight (8) characters in length and must contain at least three (3) of the following character types:

Upper case letters;

Lower case letters;

Numbers

Characters !@#\$%^&*?~()

After changing your initial password, your new password will be valid for 90 days.

The system will automatically direct you to the Change Login Password screen when it is time to change your password.

Remember that your Old Password will be "PASSWORD" if it has to be reset by the system administrator.

CSN Workgroup Home Page

Search Screens

The screen below is the first one you will see after a valid login. The items on this screen are added in the WorkgroupManager under the "Home" button and can be Search or Summary screens. Below are two different types of Search screen. The first allows the end user to enter information to filter on each field. When the "Search Now" button is clicked, the Search Results screen below is displayed. The second Search screen provides a hyperlink directly to the file as the search criteria is preset, such as showing only the active clients for the current user.

Client Search

Enter search criteria in one or more of the fields below then click the "Search Now" button.

(*) Required Fields

First Name (max 5 characters)	
Last Name (max 5 characters)	
SS Number (whole SSN only)	- -
Date of Birth (enter as mmddyy; system will auto format)	
Program (leave blank to search all available records)	Select...

Search Now

Active Clients for Current User

Client Name	Program	Date Entered	Does client have expired or expiring releases?
Hudapr, Test	Management System	10/31/2007	No

Search Results

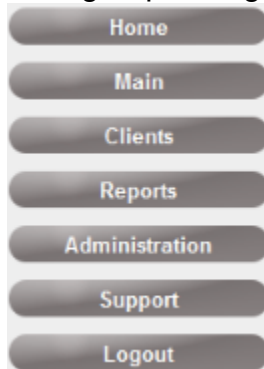
Each line is a hyperlink to the file. When the cursor is moved over a line it is hi-lighted. To enter new search criteria, click on "New Search". To add a new file, click on "Add".

Print View All d i Add New Search				
Select link below to open file or click the "Add" button to add a new entry.				
First Name	Last Name	SS Number	Date of Birth	Program
Test	Another	5555	11/20/1990	
Test	Hudapr	0000	2/2/1964	Management System

Menus and Buttons

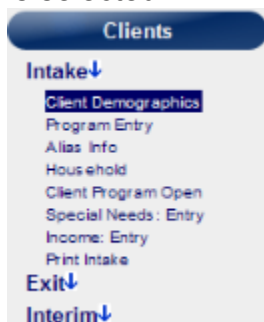
Menu Bar

The menu bar to left provides access and permissions to application screens. The primary menu buttons only appear when a workgroup has access to screens in that menu. However, the Administration menu is only accessible by System and Agency Administrators. Menu items for workgroups are administered via the WorkgroupManager.



To expand or collapse a menu, click the menu button!

Each primary menu displays additional menu items when expanded. Any menu item with a  (down arrow) has additional sub-menu items that are displayed when the item is selected.



Client Data Screens

Client Demographics

The client demographics record is the primary entry for each client. There is only one entry per client and all other client information is associated (or attached) to this record. If a duplicate record exists for a client, it is because some of the information was different when the record was initially created.

Print View All d i Edit u	
First	Test
Last	Client
Date Of Birth	11/11/1954 [54]
Social Security Number	777-77-7777
Gender	Male
Race	White
Ethnicity	Non-Hispanic or Non-Latino
Date Of Death	
UniqueID	CL111154

Date of Birth: If the date of birth is not known when the record is created, enter “01/01/1900”.

Social Security Number: If unknown, enter “000-00-0000”.

Alias Information

The alias information screen allows you to track changes in a client’s name, social security number, or date of birth. Enter the old or incorrect information here then correct the Client Demographics screen. These entries are also searched when performing a client search and are indicated by a “Yes” in the Alias column of the Search Results.

Print View All d i					
(*) Required Fields					
Date	First Name	Last Name	SS#*	DOB	Manage
07/15/2009 [54]			- -		Save
05/12/2009	Test	Smith	111-11-1111	11/11/1954 [54]	Edit Delete u

Household Members

The household member summary page shows a list of individuals who currently live or have lived with the client. These entries represent the client’s household today. When showing an “X”, the Cross Ref Only column indicates that person is no longer living with the client. When showing an “X”, the Has Programs column indicates that individual has been an applicant at the current agency. To view further details for the household member, click on the View button.

Household/Family Members for Test Hudapr						
Demonstration Agency: Belletete, Lauren/Administrator						
7/15/2008 11:02am						
Add Print						
Name	Age	Gender	Relationship	Cross Ref Only	Has Programs	
Wife Hudapr	42	F	Spouse			View
Girlchild Hudapr	33	F				View
Boychild Hudapr	7	M				View
Child Hudapr	2	M				View

□

Household member demographics are added to the same table as the client demographics and therefore require the same search as the client.

Search for a Household or Family Member for Test Hudapr	
Demonstration Agency: Belletete, Lauren/Administrator	
7/15/2008 11:02am	
Enter the search criteria: (Click here for search instructions.)	
Social Security #:	- -
First Name: (max 5 characters)	
Last Name: (max 5 characters)	
Search Now	

If the search produces a match, it means that the household member has been entered either as a client or a member of another household. Click on the name to add to the current household.

If the search does not produce a match, click on the Add New button to create a new record.

Search for a Household or Family Member for Test Hudapr		
Demonstration Agency: Belletete, Lauren/Administrator		
7/15/2008 11:03am		
New Search Add New		
Another, Test	5555	11/20/1990
Belletete, Test	1111	11/20/1990
Belletete, Test	2222	11/20/1990
Hudapr, Test	0000	2/2/1964

The household member detail screen shows all of the demographic information as well as the relationship to the current client and their household status. From this screen, you can also view related households for this individual by clicking on the View Related button. This will show all of the other applicants/clients this individual has been associated with.

Household Member Demographics
 Demonstration Agency: Bellefete, Lauren/Administrator
 7/15/2008 11:03am

Edit View Related Summary

First Name:	Wife
Middle Name or Initial:	M
Last Name:	Hudapr
Social Security Number:	000-00-0000
Date of Birth [Age]:	1/1/1968 [42]
Gender:	Female
Race:	White
Hispanic:	Hispanic or Latino
Relationship to Applicant:	Spouse
Is this a cross-reference entry only? (This person is not in the applicant's household.)	No
Comments:	

Program Entry

The Program Entry screen puts the FAMILY into a program and assigns the caseworker. When a caseworker is selected here, then the clients will appear on the Home page for that caseworker.

Print View All d i

(*) Required Fields

Program

Select
e

The Village (Women's Program)

Caseworker

Select
e

Program Entry Date

05/12/2009
d

Program Exit Date

d

Manage

Save
Edit
Delete
u

Client Program Open

The Client Program Open screen puts the individual household/family members into the program. This allows for the collection of additional information ***at the time of program entry***. An entry must be made for ***each*** household or family member participating in the program.

Program	Program Status	Caseworker	Date Entered	Date Exited
The Village			05/12/2009	

Household Member	Client, Test
Program Entry Date	05/12/2009
Is Client an unaccompanied youth?	Unknown
Disabling Condition	Unknown
If an adult, are they a veteran or have they served in the military?	Unknown
Homeless Status At Entry	Unknown
Where stayed last night/housing type:	Unknown
Other Housing Type Entry	
How long were you there?	
Zip code of last place stayed for 3 months or more:	99999
If not sure, provide city and state	
Entry Comment	

Page: 2 1

Program Entry Date: Enter the date the individual actually entered the program. This may or may not be the same date the applicant entered.

Zip Code: If unknown, enter "99999".

Special Needs: Entry/Interim/Exit

Special Needs must be entered for **ALL** household/family members participating in the program. An entry must be made at program entry, exit, and annually for program stays longer than 12 months.

Program	Program Status	Caseworker	Date Entered	Date Exited
The Village			05/12/2009	

Select Household Member	Date	Client, Test
	07/15/2009	

Alcohol Abuse	Unknown
If yes, is condition expected to be of long duration?	Unknown
Receiving treatment or services?	Unknown
Drug Abuse	Unknown
If yes, is condition expected to be of long duration?	Unknown
Receiving treatment or services?	Unknown
HIV/AIDS	Unknown
Receiving treatment or services?	Unknown
Developmental Disability	Unknown
Receiving treatment or services?	Unknown
Chronic Health Condition	Unknown
Receiving treatment or services?	Unknown
Physical Disability	Unknown
Receiving treatment or services?	Unknown
Mental Health	Unknown
If yes, is condition expected to be of long duration?	Unknown
Receiving treatment or services?	Unknown
Domestic Violence Experience	Unknown
If yes, when did Domestic Violence experience occur?	Unknown
Comments	

Income: Entry/Interim/Exit

Income information must be entered for **ALL ADULT** household/family members participating in the program. An entry must be made at program entry, exit, and annually for program stays longer than 12 months.

Program	Program Status	Caseworker	Date Entered	Date Exited
The Village			05/12/2009	

	Add	Copy	Edit	Delete	u
Household Member			Client, Test		
Date			07/15/2009		
Earned Income/Work			\$0.00		
Rental Income			\$0.00		
AFDC/TANF			\$0.00		
Social Security Retirement			\$0.00		
SSI			\$0.00		
SSD			\$0.00		
Food Stamps			\$0.00		
Workman's Compensation			\$0.00		
Unemployment			\$0.00		
Veteran's Benefits			\$0.00		
Child Support			\$0.00		
Alimony			\$0.00		
From Family			\$0.00		
Other Unearned Income			\$0.00		
General Assistance			\$0.00		
Benefits Received					
Veteran's Health Care			Unknown		
SCHIP			Unknown		
CMSP			Unknown		
Healthy Kids/Cal Kids			Unknown		
Medicaid			Unknown		
MediCal			Unknown		
Medicare			Unknown		
Total Earned			\$0.00		
Total Unearned			\$0.00		
Total Income			\$0.00		

Notes

Case notes allow up to 3,000 characters per note and are sorted in descending order (the newest on top). There is no limit to the number of case note entries.

Notes - Test Hudapr				
Demonstration Agency: Bellletete, Lauren/Administrator				
7/15/2008 11:07am				
Print View All d i				
Date	Program	Program Status	Caseworker	
10/24/2007	Management System	Suspended	Lauren Bellletete	

(*) Required Fields

Confidential	Date*	Time	Notes (the box expands as you type)*	Manage
☒	7/15/2008	09		Save
X	6/30/2008		this is a test note	Edit Delete u

Program Exit

The Program Exit screen exits the FAMILY from the program. Simply edit the program record and enter the program exit date.

[Print](#)
[View All](#)
[d](#)
[i](#)

(*) Required Fields

Program	Caseworker	Program Entry	Program Exit	Manage
3876 The Village		05/12/2009		Edit u

Client Program Close

Like the Client Program Entry, each household/family member participating in the program must be exited. The Date Client Exited Program may or may not be the same as the Program Exit date.

[Print](#)
[View All](#)
[d](#)
[i](#)

Program	Program Status	Caseworker	Date Entered	Date Exited
The Village			05/12/2009	

[Edit](#)
[u](#)

Household Member Client, Test

Date Client Entered Program 05/12/2009

Date Client Exited Program

Reason Left

Other Reason Left

Destination

Other Destination

Is move permanent?

Exit Comments

Page: [2](#) [1](#)

Non-Financial Services (Supportive Services)

The services received for **each** household are entered here and are sorted in descending order.

Non-Financial Services - Test Hudapr

Demonstration Agency: Bellefete, Lauren/Administrator

7/15/2008 11:10am

[Print](#)
[View All](#)
[d](#)
[i](#)

Date	Program	Program Status	Caseworker
10/24/2007	Management System	Suspended	Lauren Bellefete

(*) Required Fields

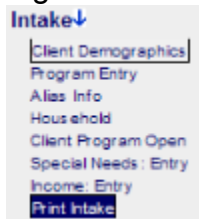
Household Member	Confidential	Service Date*	Quantity*	Service Provided*	Manage
Hudapr, Test	☒	7/15/2008	1	0	Save
Hudapr, Test	X	11/15/2007	1	Advocacy	Edit Delete u
Hudapr, Wife	X	11/15/2007	1	Employment Assistance	Edit Delete u

Printing Client Records

The information entered can be printed in two ways:

1. directly from the screen by clicking on the Print button at the top of the screen;
or
2. selecting the Print option at the end of the submenu such as Print Intake.

The Print option in the submenu prints all of the client data for the selected program together rather than on individual pages.



Select the client program:

Program: