
Marin HMIS Online

Introduction to using the Client Services
Network

First time logging into the system

- To enter the system go to <https://www.clientservicesnetwork.com/csnmarinca/>
- Click on Login. The Login screen will appear.

User ID:

Password:

SUBMIT

- Click on the User ID box. Type your User ID into the box.
- Click on the Password box. Type the word, PASSWORD, (all capital letters) into the Password box.
- Click on the SUBMIT button.
- The next screen you will see asks you to Change your (original) Login Password.

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:

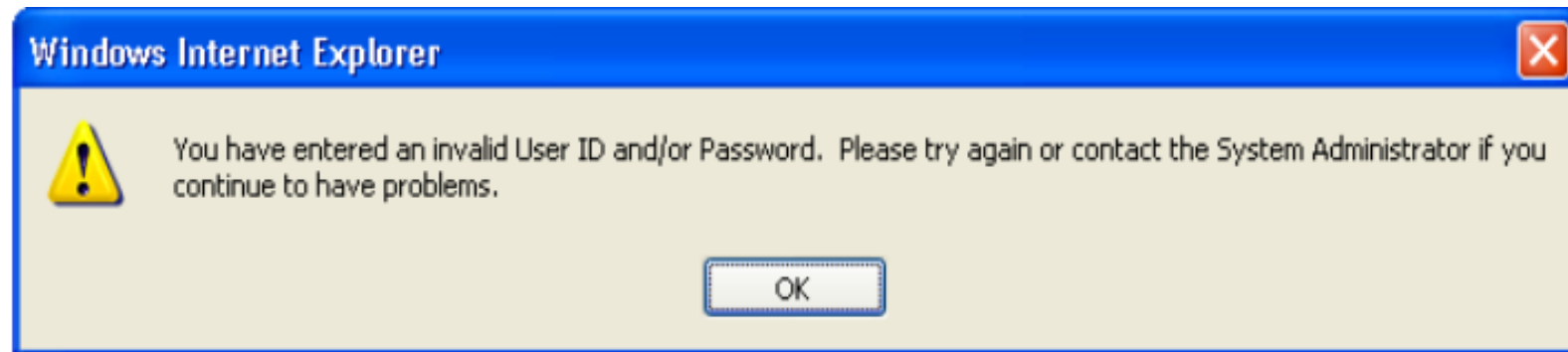
Verify New Password:

Submit

Cancel

Regular Login Procedures

- After you have logged in for the first time and changed your password, you simply follow steps 1 – 4 on the previous slide (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. The account is automatically locked out after three (3) unsuccessful attempts. You will need to contact your agency administrator to reset you password. If you are the agency administrator please contact the System Administrator.



Getting Started

- After logging into the system you should see the screen below.
- From this screen you can search for existing clients and add new ones.
- Every time you wish to add a new client you must search for the client first, (even if you know they are not in the system)
- A good way to search is to enter the first two or three letters of the clients first and last names. Entering full names is not recommended as you may find client names may have been entered incorrectly or there may be slight variations on the name, for example: If the client Miguel Garcia was entered and then entered again as Miguel

BELLDATA

Welcome to CSN V4.0!®
(powered by Client Services Network™)
Marin Housing Authority: Sepahi, Lisa/HMIS Only
9/18/2009 9:13am

[Collapse All](#)

Home
Main
Clients
Reports
Administration
Support
Logout

Client Search

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

(*) Required Fields

First Name

Last Name

SS Number - -

Date of Birth

Program

Unique ID

Active Clients for Current User

Client Name	Program	Date Entered	Does client have expired or expiring releases?
Client-DO NOT DELETE, Test	Transition to Wellness	07/07/2009	No

Menu Bars



- The Menu bar on the left of your screen will help you navigate through the system.
- As an End User you will use only four of the menu bars for everyday use.

Home

Main

Clients

Logout

Click on a menu item with your mouse to select.



When you select Home, this will take you to the client search screen.

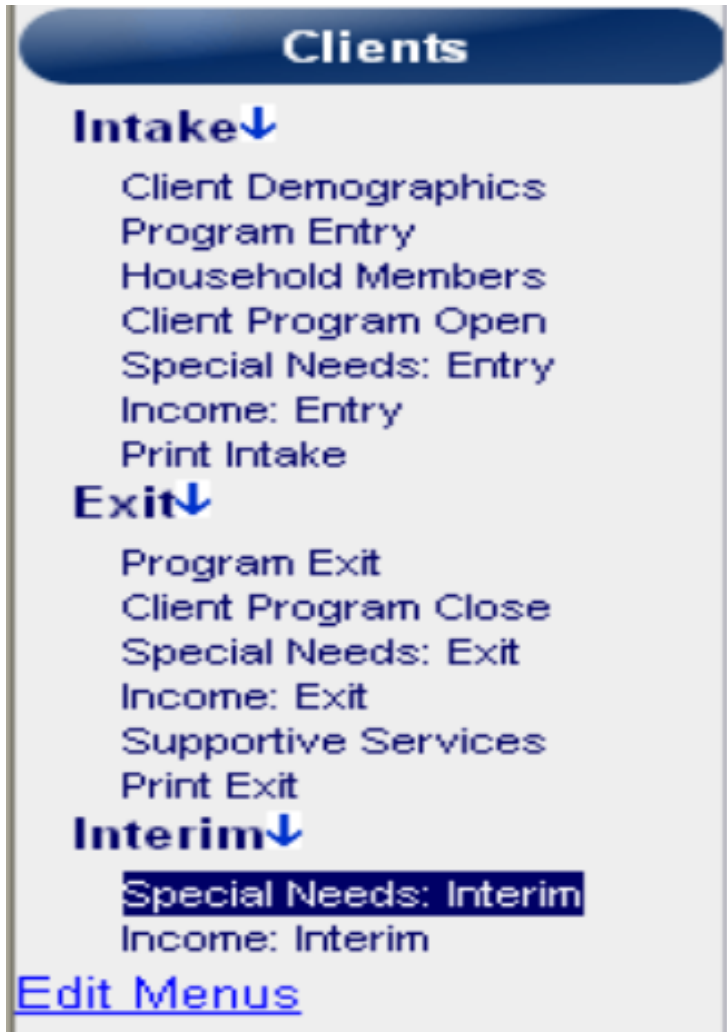


When you select Main, you will be given the options to Change Password, Logout, or Change workgroup.



To log out of the system.

Client Menu Option



- By selecting the Client option on the menu bar you will be taken to the client screens.
- You can only view these screens by searching and selecting a client.
- You will get an error message if you have not selected a client.
- The down arrow when clicked opens up the screens to show each screen option for clients.

Entering a New Client

1. To enter a new client: If the client is a single person (a household of one) From the Client Search Screen search for the client as discussed earlier.
2. If the client is part of a household (i.e. there is more than one person in a family entering the program.) You must determine who is the Head of Household. This is typically the female head of household. Search for the head of household on the client search screen. (you will have an opportunity later to search for other family/household members.)

IMPORTANT: Family or household groups are entered as a household not as single clients in the system.

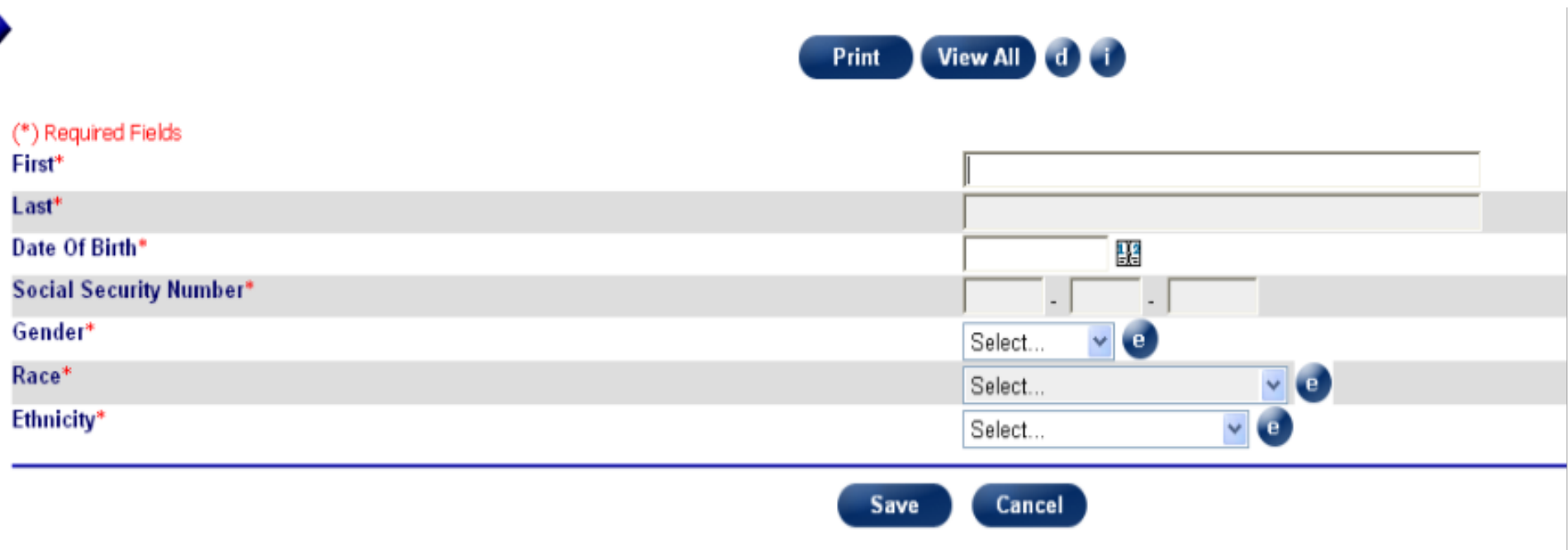
3. Once you have searched, your search results will show on the screen.
Example below:



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

Entering a New Client

- If the client you searched for is not found on the screen click the  will bring you to the client demographics screen.



The screenshot shows a web form for entering client demographics. At the top right, there are buttons for 'Print', 'View All', and a search icon. On the left, a red text label reads '(*) Required Fields'. The form fields are as follows:

- First***: A text input field.
- Last***: A text input field.
- Date Of Birth***: A date picker with a calendar icon.
- Social Security Number***: A masked input field with dashes.
- Gender***: A dropdown menu with 'Select...' and a blue 'e' icon.
- Race***: A dropdown menu with 'Select...' and a blue 'e' icon.
- Ethnicity***: A dropdown menu with 'Select...' and a blue 'e' icon.

At the bottom of the form, there are 'Save' and 'Cancel' buttons.

Client Demographics Screen

(*) Required Fields

First*

Last*

Date Of Birth*

Social Security Number*

Gender*

Race*

Ethnicity*

- On this screen you will add the Head of Household information only. All fields are required.
- First Name: No nicknames and no middle names.
- Last Name: as the client has provided.
- DOB: If the date of birth is not known when the record is created, enter 01/01/1900
- SS#: Where the SS number is unknown enter 000-00-0000 for partial SS's are acceptable like the last four digits enter zeros for the unknown digits 000-00-1234.
- Gender: this is a drop down box of options.
- Race: select which best describes the client.
- Ethnicity: Is client Hispanic or Latino?

IMPORTANT: Do not enter information which you know to be incorrect or where you do not have complete data. The demographic information is crucial to ensuring accurate reporting of the data. If in doubt or you are waiting for more information do not enter the client until you have the correct demographic data. The only place holders are described above for SS# and DOB.

Alias Information Screen

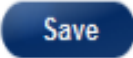
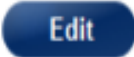
Once you have entered the demographic data click  next screen you will find Alias Information.

Alias Information

The alias information screen allows you to track changes in a client's name, social security number, or date of birth. You can also enter known alias. On this screen Enter the old or incorrect information here then correct the Client Demographics screen with the correct details. These entries are also searched when performing a client search and are indicated by a "Yes" in the Alias column of the Search Results.



(*) Required Fields

Date	First Name	Last Name	SS#*	DOB	Manage
07/15/2009 			- -		
05/12/2009	Test	Smith	111-11-1111	11/11/1954 [54]	  

Program Entry

- This screen allows you to enter a client into a program.
- From the Program Box select from the drop down the program the client is entering.
- The Entry Date is the date the client started in the program not necessarily the date of intake. This Screen enters the Family/Household into the program.
- Click “Save” to save the record.
- Select “Next” on the bottom right of the screen to continue to the next screen.

Program Entry - Test Client-DO NOT DELETE [CL111154]
Marin Housing Authority: Sepahi, Lisa/HMIS Only
9/18/2009 11:33am

←

Print View All d i

(*) Required Fields

Program*	Caseworker	Program Entry Date	Program Exit Date	Manage
Select... e	Select... e	12 56	12 56	Save
HUD Shelter Plus Care 1		07/16/2009		Edit Delete
HUD Shelter Plus Care 1		07/16/2009	08/01/2009	Edit Delete
HUD Shelter Plus Care 1		05/12/2009	07/16/2009	Edit Delete
HUD Shelter Plus Care 1				Edit Delete

Household Members

- From the Household Members screen you will be able to add all household members Adults and Children. When you select “Add” you will see the following screen:
- For each household member you will need to first search to see if they are already in the system. Use the same methods described earlier to search.
- You will be given a list of names if there are any matching your search criteria. If none matches then select “Add New”. Each client listed is a hyperlink, if a client is listed, click on this client

Search for a Household or Family Member for Test Client-DO NOT DELETE [CL111154]
Marin Housing Authority: Sepahi, Lisa/HMIS Only
9/18/2009 11:39am

← Enter the search criteria: [\(Click here for search instructions.\)](#)

Social Security # - -

First Name: (max 5 characters)

Last Name: (max 5 characters)

Household Members

- Enter all the required information for household members as you would for the head of household. Click “Save Member” when finished.
- Repeat this process for each additional household member.

Add Household/Family Members for Test Client-DO NOT DELETE [CL111154]

Marin Housing Authority: Sepahi, Lisa/HMIS Only

9/18/2009 11:46am

First Name: *	
Middle Name or Initial	
Last Name: *	
Social Security Number: *	- -
Date of Birth: *	
Gender:	Select... v
Race:	Select... v
Ethnicity:	Select... v
Relationship to Applicant:	Applicant v
Check here if this individual is not in the applicant's household:	☐
Comments:	

* - Required fields

Save Member

Cancel

Client Program Open

THIS PAGE MUST BE COMPLETED FOR EACH HOUSEHOLD OR FAMILY MEMBER PARTICIPATING IN THE PROGRAM.

Household Member*

Client-DO NOT DELETE, Test [CL111154]

e

Program Entry Date*



12
31



- For every household member you will need to complete a Program Open Page.
- Under Household Member you will find each household member you entered, in the drop down box.
- Under Program Entry Date: Enter the date the individual actually entered the program. This may or may not be the same date the Head of Household entered the program.

Disabling Condition*

Unknown

v

e

If an adult, are they a veteran or have they served in the military?*

Unknown

v

e

- Disabling Condition: A Disabling Condition is a physical, mental or emotional impairment expected to be of long-continued and indefinite duration which substantially impedes a individuals ability to live independently and of such nature that such ability could be improved by more suitable housing conditions.
- Veteran Status: A vet is someone who has served on active duty the U.S. Armed Forces. This does not include inactive military reserves or the National Guard unless the person was called to active duty.

Client Program Open

Housing Status At Entry*

Unknown

- Housing status may not be the same for each household member. For example if the head of household was living on the street prior to program entry the client would be “Literally Homeless”, if there children were living with a relative prior to program entry their status would be “Stably Housed”.

Where stayed last night/housing type:*

Unknown

Other Housing Type Entry

How long were you there?

Select...

How many times in the past three years was client homeless?

If unknown, enter 99.

- Select the option which best describes where the client was living prior to entering the program.
- Note how long they were there.
- Note how many times the client has been homeless in the last three years including this episode if currently homeless.

Zip code of last place stayed for 3 months or more:*

If not sure, provide city and state

Entry Comment

- If Zip code is unknown enter “99999” and enter the city and state if known.

Short-Cuts for Entering Household Information

- When you have entered the information for the Head of Household into the Program Open Screen and Selected save. You will see the information you entered for the client.
- At the top of the screen will be four options as seen below:



- Select “Copy” from the options.
- Once selected you will be taken to a new Program Open screen. “Copy” copies all the information from the Head of Household to another screen. This will make it quicker and easier to complete the Program Open screens for each person in the household.
- Next Select the next household member from the drop down box under “household member”.
- Make any changes to the information that are specific to the household member.
- Repeat the steps for each additional member until each member’s information is entered.

Note: You can also use the copy function on the Special Needs and Income Screens.

Special Needs

- ***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.

PrintView Alld i

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

AddCopyEditDeleteu

Select Household MemberClient, Test

Date07/15/2009

Alcohol AbuseUnknown

If yes, is condition expected to be of long duration?Unknown

Receiving treatment or services?Unknown

Drug AbuseUnknown

If yes, is condition expected to be of long duration?Unknown

Receiving treatment or services?Unknown

HIV/AIDSUnknown

Receiving treatment or services?Unknown

Income Screen

- 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. Income is recorded separately for each client, do not combine household income under one household member.

Print		View All		d	i
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			

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

Program Exit

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

PrintView Alldi

(*) Required Fields

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