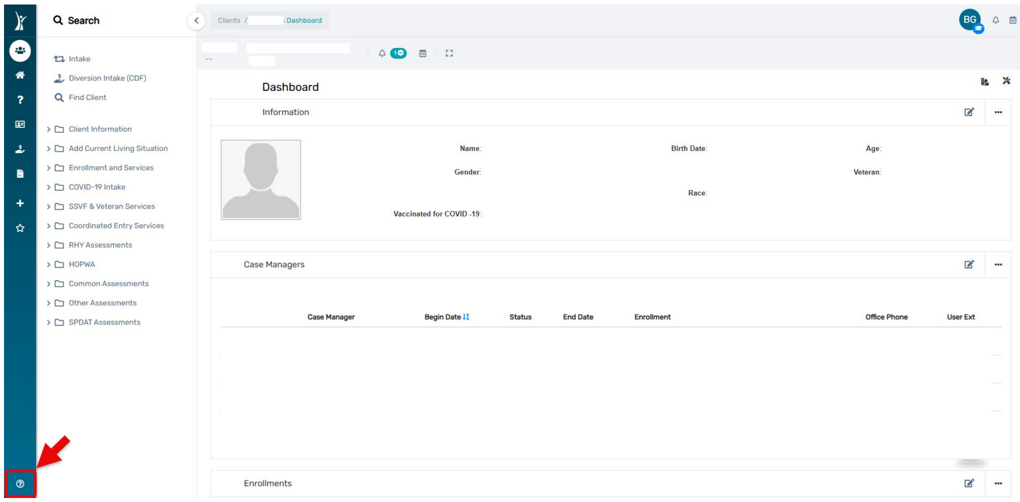
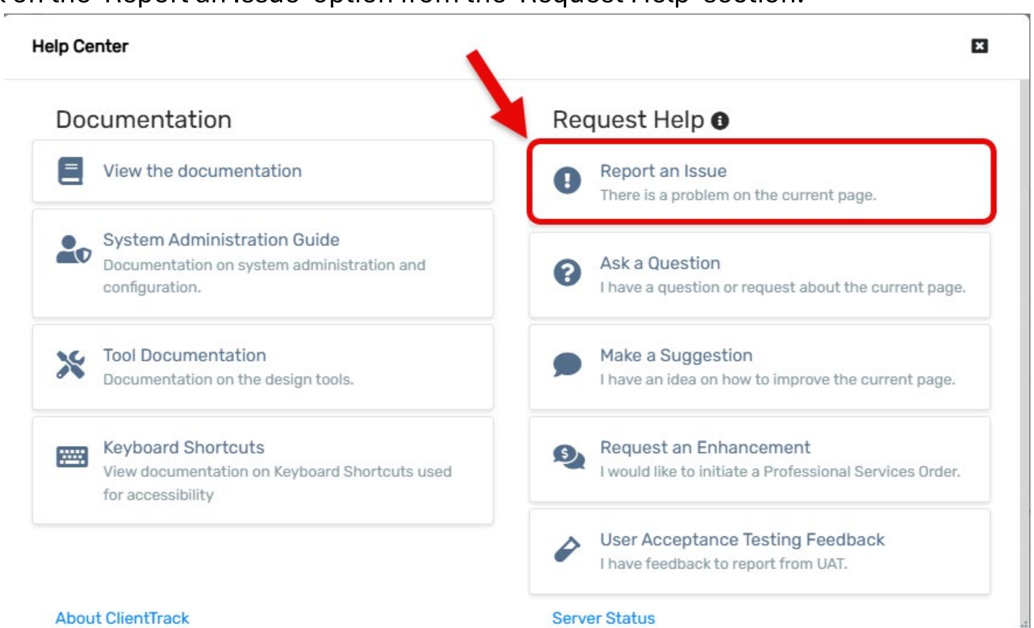
<u>Entering an HMIS Issue Ticket for Anonymous Client & Merge Client Requests</u>

1) Logged into the HMIS, use the ‘Client’ workspace to find the impacted client. Once you have this client dashboard open.
2) Click on the Help workspace (? Icon on the bottom left corner of the left-hand navigation bar).



3) Click on the ‘Report an Issue’ option from the ‘Request Help’ section.



4) On the ‘Report an Issue’ screen, you’ll want to provide as many details as possible for the HMIS Team to respond to your request quickly and efficiently. Below are examples of information you could provide to assist the HMIS Team with addressing your request.

<u>Annonymous Client Requests</u> – Client has revoked consent to have information in HMIS, Fleeing Domestic Violence, or has positive HIV/AIDs status.

1) Enter a summary of your issue:

    Make Anonymous - Client ID XXXXXX

2) Please describe the issue:

    Please include the impacted client ID

    Duplicate Client IDs

    Are there any duplicate client ID(s) for this client?

    If so, what information matches name, ssn, birthdate, etc.

    Domestic Violence

    Is this client fleeing domestic violence and needing to moved to another family?

    Is the client fleeing from someone in their current family?

    Should any other clients in the family be moved to a new family with the client that need to be de-identified?

    De-identify Other Family Members

    Are any other members of their family that also need to be de-identified?

3) Fill in your contact information for your email address and phone number where you can be contacted for any questions about the request.
4) On the ‘Notify additional people’, is where you can add additional interested parties like other active case managers that this client is working with.

Report an Issue

Enter a summary of your issue *

Make Annonymous - Client ID XXXXXX

The summary helps to quickly identify your issue when you're referring back to it later.

Please describe the issue

Rubik

Please include the impacted client ID

Duplicate Client IDs

-Are there any duplicate client ID(s) for this client?

If so, what information matches name, ssn, birthdate, etc.

Domestic Violence

-Is this client fleeing domestic violence and needing to moved to another family?

-Is the client fleeing from someone in their current family?

-Should any other clients in the family be moved to a new family with the client that need to be de-identified?

De-identify Other Family Members

-Are any other members of their family that also need to be de-identified?

Please enter any details that might help describe the issue or might help in solving it.

Click here to attach a file or drag-and-drop

View Debug Information

☐ Send to ClientTrack

How can we reach you?

Email Address *	name@name.com
Phone Number *	555-555-5555

Notify additional people

Submit Cancel

<u>Merge/Duplicate Client Requests</u> – Multiple Client IDs in the HMIS for the same client.

If the duplicate client records have any overlapping enrollments, let us know what we should do with the overlapping enrollments to accurately reflect the client's journey.

1) Enter a summary of your issue:

   Merge Clients - Client IDs XXXXXX, XXXXXXX

2) Please describe the issue:

   Please include the impacted client IDs

   What information matches between the client IDs - name, ssn, birthdate, etc.

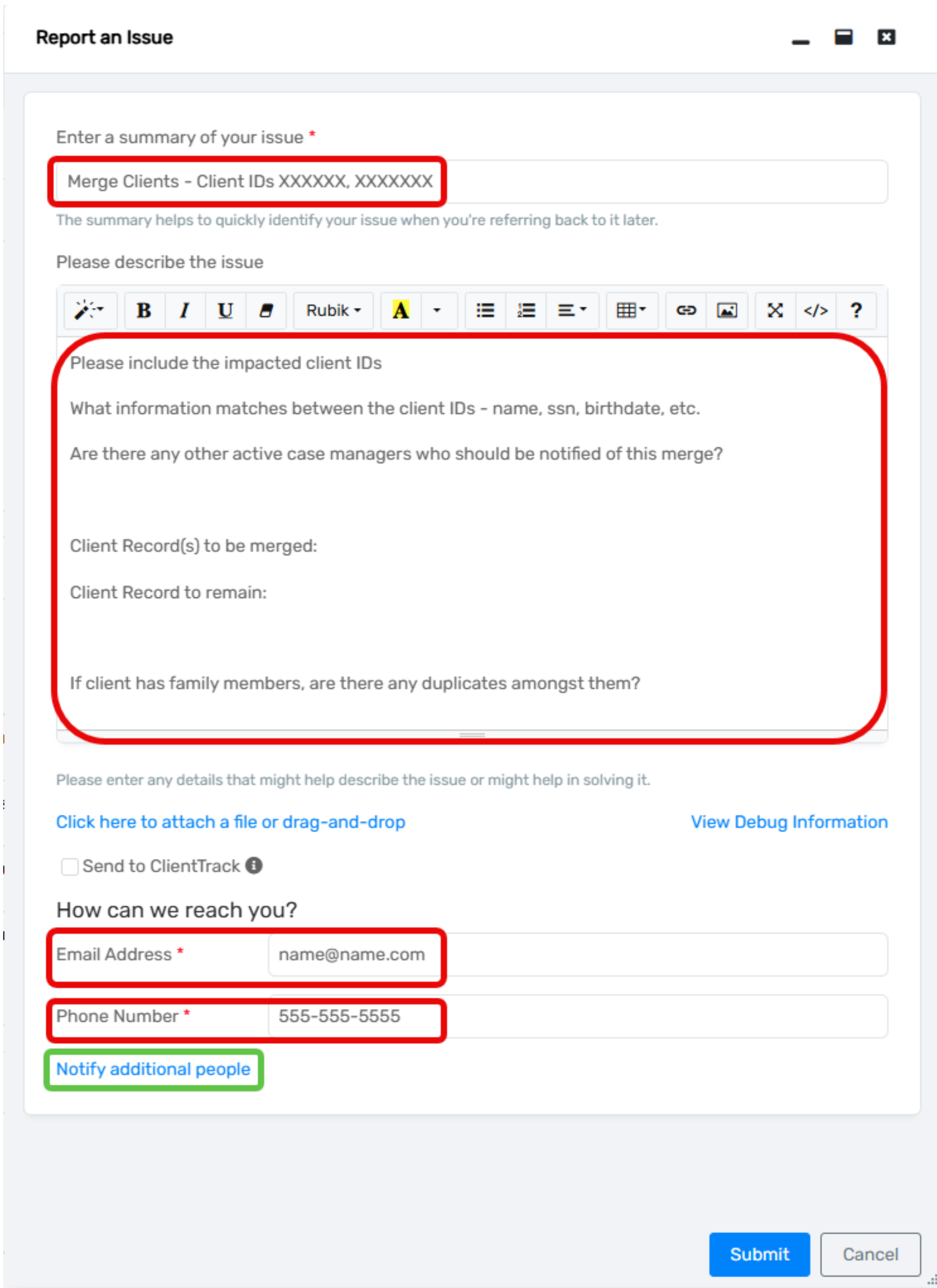
   Are there any other active case managers who should be notified of this merge?

   Client Record(s) to be merged:

   Client Record to remain:

   If client has family members, are there any duplicates amongst them?

3) Fill in your contact information for your email address and phone number where you can be contacted for any questions about the request.
4) On the 'Notify additional people', is where you are able to add additional interested parties like other active case managers that this client is working with.



Report an Issue

Enter a summary of your issue *

Merge Clients - Client IDs XXXXXX, XXXXXXX

The summary helps to quickly identify your issue when you're referring back to it later.

Please describe the issue

Rubik

Please include the impacted client IDs

What information matches between the client IDs - name, ssn, birthdate, etc.

Are there any other active case managers who should be notified of this merge?

Client Record(s) to be merged:

Client Record to remain:

If client has family members, are there any duplicates amongst them?

Please enter any details that might help describe the issue or might help in solving it.

Click here to attach a file or drag-and-drop

View Debug Information

Send to ClientTrack

How can we reach you?

Email Address *	name@name.com
Phone Number *	555-555-5555

Notify additional people

Submit Cancel

Thank you for helping the HMIS Team with processing these client de-identification and merge requests more efficiently and effectively!