

BELL DATA SYSTEMS, INC.

Client Services Network / HMIS Module Detail

General Information

The CSN/HMIS module is a highly user customizable on-line application used by the social service industry. All sections with the exception of static demographic information maintain a complete history of the data entered and also allow record level releases. This would allow one entry to be released while keeping another confidential. This module contains all of HUD's universal data elements.

Wednesday, December 14, 2005 Main Clients Reports Administration Logout

Search for a Client Current User: Bellefete, Lauren

Agency: Demonstration Agency

Referrals
Change Password
Logoff

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

Social Security #: - -

First Name: (max 5 characters)

Last Name: (max 5 characters)

Active Clients for Current User:

- CLIENT, ANOTHER (Comprehensive Care - 12/12/2005)
- CLIENT, TEST (Comprehensive Care - 6/4/2005)
- SADIE, SWEET (Single Women - 12/10/2005)

Client Follow-Ups:

Client	Type	Date	Program
CLIENT, TEST	Housing Follow-up	12/10/2005	Comprehensive Care

Demographic Information

General demographic information is collected including race, ethnicity, marital status, veteran status, and citizenship.

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Program Intake/Exit Information

A customized intake screen is created to capture specific information required by the agency as the client applies for services or enters a program as well as when a client exits a program. This section maintains a complete history of each time the client enters a program.

Wednesday, December 14, 2005 Main Clients Reports Administration Logout

Program Entry - TEST Q CLIENT

Current User: Belletete, Lauren

Agency: Demonstration Agency

Client Search
Program Summary
Client Demographics
Client Appointments
Intake
Program Assignment
Household Members
Special Needs
Income at Entry
Address History
Precipitating Problems
Emergency Contacts
Assessment
Services Requested
Referrals
Other Agency Involvement
Public Assistance
Employment
Skills/Education
Services
Services Requested
Non-Financial Services
Financial Services
Referrals
Notes
Releases
Medical/MH
Medical
Pregnancy
Dental
Mental Health
Substance Abuse
Substance Abuse Treatment
TB Screening

Print
Add Edit Delete

Confidential Status	X
Program	Active
Date Referred	Comprehensive Care
Date Entered Program	6/1/2005
Time Entered Shelter	6/4/2005
Referred By	03:00
Caseworker	Self-Referral
Bed Assignment	Lauren Belletete
Disabling Condition	52
Housing Type at Entry	No
How long was the client at last residence?	Domestic violence situation
Homeless Status	More than three months, but less than one year
Zip Code of Last Permanent Address	At Risk
Employment at Entry	28205
Comments	Part-time

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Housing

Collects address and landlord information and maintains a history file that is available to the user in reverse chronological order by date moved in. Also collects reasons for leaving address and housing type.

Veteran Information

Detailed veteran information is in compliance with HUD's universal data standards.

Special Needs

Additional needs or considerations of client including (but not limited to) HUD categories.

The screenshot shows a web application interface for "Special Needs - TEST Q CLIENT". The top navigation bar includes "Main", "Clients", "Reports", "Administration", and "Logout". The current user is identified as "Current User: Belletete, Lauren". The left sidebar contains a menu with categories like "Client Search", "Program Summary", "Client Demographics", "Client Appointments", "Intake", "Assessment", and "Skills/Education". The main content area displays a table of client information for "DEMO" in the "Supportive Housing" program, which is "Active". The table includes columns for "Agency", "Program", "Status", "Date Referred", "Date Entered", "Date Exited", and "Case Worker". Below this, there is a section for "Special Needs / Population" with a table showing dates (12/14/2005, 10/24/2005, 11/14/2005) and corresponding needs (Neglect, DSS Involvement). The interface also includes "Edit" and "Delete" buttons for each entry, a "Save" button, and navigation links for "Previous Page" and "Next Page".

Precipitating Problems

The factors contributing to the client's need for services.

Other Family/Household Members

General

Each household/family member is added to the database just like a client. They can then be entered into a program without having to re-enter their personal information.

Minor Children

General demographic, special considerations, custody, school, and daycare information is collected for each child. The medical, mental health, drug/alcohol use, and legal client add-in modules are also available for children.

Other Adults

General demographic and special consideration information is collected for each adult. The medical, mental health, drug/alcohol use, employment, education, and legal client add-in modules are also available for other adults.

Cross-Reference

Each individual is cross-referenced to the Primary Applicant along with their relationship. The system automatically summarizes the number of adults and children in the household. An individual can be added as a "cross-reference only" entry to create a link without including them in the household count. A list of all other client files an individual is cross-referenced to is easily accessible.

Emergency Contacts

Emergency contact information for client with indicator for primary contact.

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Family Income at Entry and Exit

Includes income from wages, AFDC/TANF, SSI, food stamps, veterans benefits, unemployment, retirement, pension and child support. Software collects expenses for housing, utilities, food, transportation, childcare, medical expenses and loans. A history is available to the user in reverse chronological order based on entry date. Calculates the Federal Poverty Level for each application based on the application year and household size.

Family Expenses

Collects expenses for housing, utilities, food, transportation, childcare, medical expenses and loans. A history is available to the user in reverse chronological order based on entry date.

Loans and Assets

Software tracks any outstanding loans and available assets for those programs requiring this information.

Public Assistance Programs

Section maintains a list of the public assistance programs that are being received or have been applied for as well as the social worker responsible, the social worker's phone number, date applied, SSDI payee and SSDI disability.

Financial Services / Fund Disbursements

All information for financial services (fund disbursements) provided to the client, family member, or household member is collected here. This includes the fund, vendor, and category of disbursement. This section may also include HOPWA related information.

Non-Financial Services

Services provided to or on behalf of the client, family member, or household member excluding fund disbursements.

Referrals

Tracks referrals to other agencies along with a notes section.

Other Agency Involvement

A list of other agencies assisting the client and the caseworker's contact information.

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Progress Notes

Input field allows the interviewer/case worker the ability to enter case notes. A history is available to the user in reverse chronological order based on entry date.

Wednesday, December 14, 2005

Main Clients Reports Administration Logout

Agency: DEMONstration Agency

Notes - TEST Q CLIENT

Current User: Bellefete, Lauren

Print

Agency	Program	Status	Date Referred	Date Entered	Date Exited	Case Worker
DEMO	Supportive Housing	Active	10/1/2004	10/2/2004		Shelly Mossey

Program : 3 2 1

Agency	Confidential	Date	Time	Notes	User	Manage
DEMO	<input checked="" type="checkbox"/>	12/14/2005				Save
DEMO		11/14/2005	12:47pm	This is a test note. This space is used to enter case notes about a client.	LAURENB	Edit Delete

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Outcomes

Client appointments with agency staff including type, status, and client check-in screen. Also includes ability for staff to set appointment times for scheduling

Employment/Occupational Skills/Education

Employment History

Complete employment information including employer information, rate of pay, description of duties and reason for leaving. Also tracks whether or not the client desires employment and vocational training.

Occupational Skills and Training

Tracks computer skills, machine skills and general occupational skills

Education

Tracks highest level of education completed and college/vocational education information

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Medical

General Medical History

Medical information including medical problems, treatment, medication and doctor/hospital/clinic performing treatment.

Pregnancy Information

General pregnancy information including any problems, medication, prenatal care, treatment and doctor/hospital/clinic performing treatment.

Dental Information

General dental information including any problems, medication, treatment and doctor/hospital/clinic performing treatment.

Tuberculosis Screening

Brief assessment to determine if further TB testing is needed.

Mental Health

General Mental Health History

Mental health information including diagnosis, medication, treatment and doctor/hospital/clinic performing treatment.

Assessment/Treatment Information

Tracks whether or not the client is willing to receive assessment or treatment along with a notes section.

Psychiatric Facility Admissions

The Software collects information on any psychiatric facility admissions along with a note section. A history is available to the user in reverse chronological order based on entry date.

Drug and Alcohol Use

Substance Usage History

Lists the substance used date of last use, amount of last use, date of first use.

Treatment and Assessment History

Tracks inpatient and outpatient treatment as well as clean time and meetings/aftercare. Additionally this section tracks whether or not the client is willing to receive assessment/treatment along with a note section.

Criminal/Judicial Information

Current Litigation

Identifies any civil or criminal litigation the client in which the client is involved as a plaintiff or defendant including domestic violence cases and restraining orders.

Probation/Parole Information

Tracks probation/parole information, probation/parole officer, officer's phone number, date of contact, terms of probation/parole and notes.

Arrest History

Tracks arrest history including charge, felony/misdemeanor/, county/state of arrest, and whether or not convicted.

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Appointments

Client appointments with agency staff including type, status, and client check-in screen. Also includes ability for staff to set appointment times for scheduling

Client Follow-ups

Staff can schedule a follow-up reminder that appears on the client search screen.

Wednesday, December 14, 2005

Client Follow-Up - TEST Q CLIENT

Main Clients Reports Administration Logout

Agency: DEMONSTRATION AGENCY

Current User: Belletete, Lauren

Agency	Program	Status	Date Referred	Date Entered	Date Exited	Case Worker
DEMO	Comprehensive Care	Active	6/1/2005	6/4/2005		Lauren Belletete

Program : 3 2 1

Add Edit Delete

Follow-Up Date: 12/10/2005
Due Date: 12/12/2005
Completed Date:
Type: Housing Follow-up
Comments: Ensure client is still in permanent housing.

Facility Management

Tracks client's occupancy, fees, and payments.

Reports

- Active Clients by Caseworker or Program
- Demographics Summaries
- Services Summaries
- Outcomes Summary
- Fund Disbursement Summaries
- HUD and HOPWA APRs
- AHAR
- Many others including custom reports

Client Services Network – General Security

User Name and Password

Users of Client Services Network have their own unique user name and a password that they are required to enter each time they log on to the application. The frequency of changing of passwords can be set to meet the security protocols of your organization.

Logon to Client Services Network

Agency:None Current User:

There are no messages today!

User ID:

Password:

SUBMIT

User Group Permissions

Another security feature is the ability to create different User Groups within your organization. Every User is assigned to a User Group and each User Group has its own menu which is set up to include only screens required for that group. In addition to limiting the access to certain information, the Administrator can grant permissions of Read Only, Add, Add/Edit, Edit, and Full on each individual screen for each User Group. If a User has Edit capabilities, that User can only edit data that was entered by your organization. This feature can also be modified so that only the User who created the record originally can edit or update the record. Only a User who has Full permission to a screen can delete a record.

Friday, December 16, 2005 Main Clients Reports Administration Logout

Agency: Demonstration Agency Current User: Edwards, Marissa

Print List Return to User Groups

Sort Order	Type	Menu Item	Screen	Permission	Manage Entry
	Single		Address History	Add	Add Entry
1	Single	Program Summary	Program Summary	ReadOnly	Edit Delete
2	Single	Client Demographics		Full	Edit Delete
3	Single	Client Appointments	Appointments	Full	Edit Delete
4	Group	Intake			Edit Delete
5	Group	Assessment			Edit Delete
6	Group	Services			Edit Delete
7	Group	Medical/MH			Edit Delete
8	Group	Legal			Edit Delete
9	Group	Exit			Edit Delete
10	Single	Notes	Notes	Full	Edit Delete
11	Single	Follow-Ups	Client Follow-Up	Full	Edit Delete

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Client Services Network – Shared Environment Security

Releases

If your organization is part of a group that shares information, you can select which other organization(s) can see your data for each client by choosing to release the information. In addition you can set an expiration date for the Release. This is done at the individual client level.

Releases - TEST Q CLIENT

Current User: Edwards, Marissa

Print

Release Date: 12/16/2005

Released To: Select...

Released By: []

Expiration Date: []

Manage: [Save]

Record Level Confidentiality

In addition to limiting which other organization(s) are able to see certain client files, users can make any individual record confidential within a client file. Therefore, if a user has released a file to another organization, the user can still choose to not allow certain records within that file to be shared. In the following example, this record has been marked as Confidential; therefore, no other organization will be able to see this record even if the file has been released to that organization.

Friday, December 16, 2005

Address History - TEST Q CLIENT

Current User: Edwards, Marissa

Print

Agency	Program	Status	Date Referred	Date Entered	Date Exited	Case Worker
DEMO	S+C	Active	10/1/2003	11/1/2003	12/12/2005	Marissa Edwards

Program : [3] [2] [1]

Agency: DEMO
Confidential: X
Date: 12/12/2005
Address: 21 Jump Street
City: Bokeelia
State: AK
Zip Code: 65432
Date From: 12/2/2003
Date To: 12/6/2004
Landlord: test
Rent: 500
Reason Left: test
User: MEDWARDS
Last Modified: 12/12/2005

Page: [2] [1]

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Client Services Network – Other Features

Data Entry Auditing

Every record in every table in the CSN data has the following four fields: Created By, Date Created, User ID, and Last Modified. The Created By field indicates the user who initially created that record and the Date Created field shows the Date and Time that record was created. The User ID field keeps track of the last user to make a change to that record and the Last Modified field will indicate the Date and Time that the record was modified. This feature is excellent for internal auditing of your users' data entry.

Follow-Up

Client Services Network allows you to mark a file for a follow-up. The follow up feature will keep track of the Due Date, Completed Date and the type of follow up necessary. Files that have follow-ups that have not been completed will appear on the Client Search screen of the user assigned to that file.

Monday, December 19, 2005 Main Clients Reports Administration Logout

Client Follow-Up - TEST Q CLIENT Current User: Belletete, Lauren

Agency: Demonstration Agency Print

Agency	Program	Status	Date Referred	Date Entered	Date Exited	Case Worker
DEMO	Comprehensive Care	Active	6/1/2005	6/4/2005		Lauren Belletete

Program : 3 2 1

Add Edit Delete ⓘ

Follow-Up Date: 12/10/2005
Due Date: 12/12/2005
Completed Date:
Type: Housing Follow-up
Comments: Ensure client is still in permanent housing.

Wednesday, December 14, 2005 Main Clients Reports Administration Logout

Search for a Client Current User: Belletete, Lauren

Agency: Demonstration Agency

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

Social Security #: - -

First Name: (max 5 characters)

Last Name: (max 5 characters)

Search Now

Active Clients for Current User:

- CLIENT, ANOTHER (Comprehensive Care - 12/12/2005)
- CLIENT, TEST (Comprehensive Care - 6/4/2005)
- SADIE, SWEET (Single Women - 12/10/2005)

Client Follow-Ups:

Client	Type	Date	Program
CLIENT, TEST	Housing Follow-up	12/10/2005	Comprehensive Care

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Client Services Network / HMIS Module

All sections with the exception of static demographic information maintain a complete history of the data entered and also allow record level releases. This would allow one entry to be released while keeping another confidential. This module contains all of HUD's universal data elements.

- Demographic Information
- Program Intake/Exit Information
- Housing
- Veteran Information
- Special Needs
- Precipitating Problems
- Other Family/Household Members
- Emergency Contacts
- Family Income at Entry and Exit
- Family Expenses
- Loans and Assets
- Public Assistance Programs
- Financial Services / Fund Disbursements
- Non-Financial Services
- Referrals
- Other Agency Involvement
- Progress Notes
- Outcomes
- Employment/Occupational Skills/Education
- Medical/Pregnancy/Dental
- Mental Health
- Drug and Alcohol Use/Treatment History
- Current Litigation
- Probation/Parole Information
- Arrest History
- Appointments
- Client Follow-ups
- Facility Management
- HUD/HOPWA APR
- AHAR

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BDS Custom Application Module

This module was designed to enable organizations to create custom applications while reducing the development time and costs.

Includes:

- User security
- Custom menus
- Custom reports
- Database development
- Needs analysis
- Shopping cart

Wednesday, December 14, 2005 Main Clients Reports Administration Logout

Template Page Objects

Agency: Demonstration Agency Current User: Belletete, Lauren

PageID	Title	Agency ID	Type	Client	Program	Header	Note	Header	Manage
51	Address History	All	2	Yes	Yes	No			<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/> <input type="button" value="Fields >>>"/>
110	Appointments	All	1	Yes	No	No			<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/> <input type="button" value="Fields >>>"/>
16	Arrest History	All	2	Yes	Yes	No			<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/> <input type="button" value="Fields >>>"/>
42	Assets	All	1	Yes	Yes	No			<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/> <input type="button" value="Fields >>>"/>
128	Children's Education	All	2	Yes	Yes	No			<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/> <input type="button" value="Fields >>>"/>
134	Client Follow-Up	All	2	Yes	Yes	No			<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/> <input type="button" value="Fields >>>"/>
18	Current Legal Involvement	All	2	Yes	Yes	No			<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/> <input type="button" value="Fields >>>"/>
19	Dental	All	2	Yes	Yes	No			<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Copy"/> <input type="button" value="Fields >>>"/>

Wednesday, December 14, 2005 Main Clients Reports Administration Logout

Template Field Objects/Create Stored Procedure

Agency: Demonstration Agency Current User: Belletete, Lauren

Address History (All)

Page Order	Field Name	Caption	Type	Required	Alignment	Default Value	Manage
1	ID		Session	No	Left		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
2	AgencyID	Agency	SessionVisible	No	Left		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
3	CombinedID		Session	No	Center		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
4	IntakeID		Session	No	Center		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
5	NoteID		Session	No	Center		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
6	Confidential	Confidential	CheckBox	No	Left	0	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
7	Date	Date	Date	Yes	Left	Current Date	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
8	Address	Address	Text	No	Left		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
9	City	City	Select	No	Left		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
10	State	State	Select	No	Left		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
11	Zip	Zip Code	Text	No	Left		<input type="button" value="Edit"/> <input type="button" value="Delete"/>
12	DateFrom	Date From	Date	No	Left	Null	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
13	DateTo	Date To	Date	No	Left	Null	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

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BDS Employee Module

All sections with the exception of static demographic information, maintain a complete history of the data entered.

- Employee demographics
- Contact information
- Previous employment history
- Position and salary history
- Review history
- Benefit history
- Education
- Certifications received
- CPE / Training history
- Follow-up reminders
- Notes
- Incident reporting

BDS Business Survey and Financial Screening Module

This module was designed to assist businesses with creating customer surveys and on-line preliminary applications.

- User/company contact information
- Unlimited data entry screens
- Collect financial screening information
- Perform custom calculations
- Provide feedback to user with graphs and email