

HMIS Release Notes

Improved Search Results for Duplicate Client Records & Improvements to Document Check

June 15, 2020

What are the changes?

1. Improved Search Results for Duplicate Client Records

Users will now have an improved ability to search for a duplicate client record when adding a new client to the system.

2. Improvements to Document Check

Users will have additional information and other visual and organizational improvements to the Document Check feature.

Which users are impacted?

Improved Search Results for Duplicate Client Records - Any user role that creates a new client in the system and must check for a duplicate record.

Improvements to Document Check - Users of the Coordinated Access – Network role who work with client files.

How does this help?

Improved Search Results for Duplicate Client Records

Currently, when searching for a duplicate client record, the results are often irrelevant or not sufficiently specific.

The improved logic will provide better and more succinct results when searching for a client. The results will be more relevant and presented in an easier to read format.

Improvements to Document Check

An improved, clearer document check summary screen allows easier assessment of existing documents in the system.

When will I see this change in HMIS?

This change is expected to be rolled out on Monday, June 15, 2020.

Summary of the changes:

1. Improved Search Results for Duplicate Client Records

- Improved search results when searching for a client record, results are scores for best match and ordered to show these at the top of results
- Improved logic when searching on partial client data
- Ability to view how many records matched the search criteria
- Searches with too many results are not display, instead a prompt asks you to provide additional search criteria

Additional Resources on this change

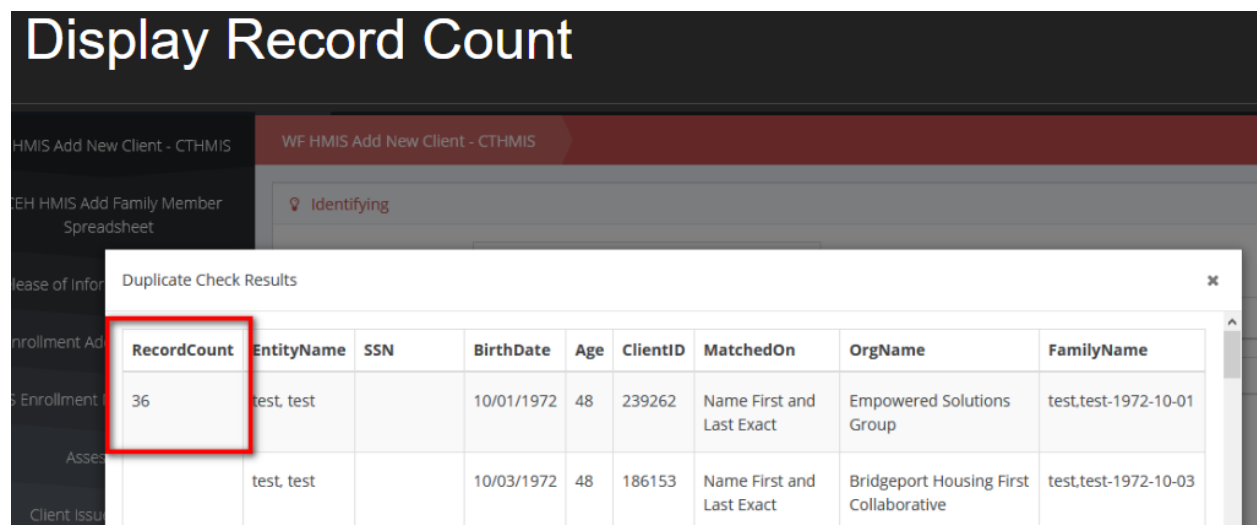
- [Knowledge Base article](#) – This document goes into detail on the logic used for returning results
- [Video Demonstration](#) – See the changes in action

2. Improvements to Document Check

- “View File” button now only show when a document has been uploaded
- Added “Created Date” (HMIS Upload Date) to form
- Removed “Upload Image field” on summary form
- Removed Save button at bottom, Changed Cancel to Done on summary form
- Removed “Verification method” on summary form
- Removed “Storage Location” on summary form

Screenshots of Changes

1. Improved Search Results for Duplicate Client Records



Display Record Count

RecordCount	EntityName	SSN	BirthDate	Age	ClientID	MatchedOn	OrgName	FamilyName
36	test, test		10/01/1972	48	239262	Name First and Last Exact	Empowered Solutions Group	test,test-1972-10-01
	test, test		10/03/1972	48	186153	Name First and Last Exact	Bridgeport Housing First Collaborative	test,test-1972-10-03

Display Record - Result Limit

CCEH HMIS Add Family Member Spreadsheet

Identifying

Name Data Quality ★ Full name reported

Duplicate Check Results

Too many results, please narrow search. (1870 Results)

Release of Information

Enrollment Add/Edit

HMIS Enrollment Member

Assessment

2. Improvements to Document Check

Document Type	File Name	View File	HMIS Upload Date	Expiration Date	Restriction	Created By	Delete
Low Bidder's Itemized Bid Form with Unit Pricing	DashboardVI.png	View File	6/9/2020		Shared	jbuckley	Delete
Disability Verification	DVF.pdf	View File	11/15/2018		Shared		Delete
Income Verification	HVL.pdf	View File	11/13/2018		Shared		Delete
Check Copy	184512.pdf	View File	12/21/2017		Shared		Delete