User’s Manual

Introduction

Why H.Net Horizon?

Many HMIS data collection software packages do not take into account the specific needs for each continuum they are used in. This is why H.Net Horizon was developed for the Oklahoma City and Norman continua.

Previous attempts at creating an active, useful database of HMIS information simply did not turn out as envisioned. The users needed something that didn't add a large burden to their already substantial workload. Additionally, training required long sessions of sometimes confusing information.

H.Net Horizon was released in March of 2007. It has prompted great response from the community ever since. Not only does H.Net Horizon simplify HMIS data entry, it opens the door for more customized reporting than was ever possible in previous efforts.

How Horizon is Different

The program itself is accessed via a downloaded Adobe Flash™ object. This means no more waiting for individual web pages. Everything needed is downloaded to any web browser capable of running Adobe Flash Player 9™. If an upgrade is released, a simple refresh of the website ensures you have the latest changes.

Designing the application in this way allowed us to be free with ideas that help the user become productive almost immediately. This is achieved through the use of brighter colors, larger text, and a visual representation of different areas.

From its conception, H.Net Horizon was built to conform to the HUD HMIS Data and Technical Standards. Much research went in to filling in grey areas that were very confusing when using a real world example. Every effort was taken to make certain the data collected will be full and meaningful. No blanket "other" answers or fields that allow blank or wrong data to be entered. This means accurate information on APR reports, custom reports, and other data generated by H.Net.

System Requirements and Security Considerations

These requirements and considerations are not only to ensure the best experience in Horizon, they are also required for compliance with being on the HMIS. Please read these sections carefully and contact your HMIS administrator if you have any questions.

System Requirements

Minimum System Requirements

These are the minimum requirements in order to be able to access Horizon via the Internet. Any computer not meeting these specifications will not perform reliably.

Pentium III 1.2 GHz CPU
256 MB System Memory
Windows XP or Windows 2000 Professional
Internet Explorer 6.0
High Speed Internet (DSL, Fiber, or Cable with Static IP Address)

Recommended System Requirements

These requirements are recommended for the best performance for today's web applications, including Horizon. Although it is possible to run the program on a much slower system, it does not provide for the best user experience.

Pentium 4 2.0 GHz CPU or Greater
1 GB System Memory or Greater
Windows XP Professional
Internet Explorer 6.0
High Speed Internet (DSL, Fiber, Cable, or Greater with Static IP Address)

Security Requirements

Current Virus Scanning Solution

Data security and integrity is vital to the HMIS initiative. It is also required by the HMIS Standards. All systems should be using the most up to date virus program and definitions to insure safety against harmful programs.

Firewall

The connection to the Internet must be secured via a Hardware or Software Firewall. Most businesses have a Hardware Firewall in place. In some cases, a Hardware Firewall is not available. In these cases, steps should be taken to enable the built in Firewall solution for Windows XP or a reputable 3rd party program must be purchased and installed.

Other operating systems may require purchasing another program for a Firewall Solution if a Hardware Firewall is not in place.

In some cases, you may offer a PC lab with access to the Internet for clients. If this is the case, please make sure steps are taken to separate them from the rest of the network that has full access to HMIS.

Password Protection

Terminals used for HMIS Data Access are required to have a secure password to log into the system. The password must be at least 8 Characters long, containing at least one number and one capitalized letter.

If the computer accessing the HMIS is part of a "Domain," this usually means you must enter a password to gain access to any applications. Any system that does not belong to a Domain must have a local login and password configuration.

Terminals being used to access HMIS should have a screen saver enabled on the PC with password protection:

Installation

Setup Interview with HMIS Administrator

Before you may access Horizon, you must have a username and password setup by your HMIS Administrator. Before going through the setup interview, be thinking of an appropriate password. Passwords must be at least 8 characters long with one number and one capitalized letter. You may have more, but one of each is the minimum.

Your HMIS Administrator will ask you for your office's IP address. You can find out your IP address by visiting https://www.okchmis.com/whatismyip.asp.

Create Desktop Shortcut

Find an area on your desktop that doesn't already have an icon and Right-Click. Choose New > Shortcut. In the box provided type the address given to you by your HMIS Administrator. Be certain you use "https://" when typing in the URL. This means all data will travel across a secure, encrypted connection.

Alternatively, you could type the address in your web browser's address bar, and set it as a Favorite. However, doing so may enable the browser's Back button. Choosing this button while in Horizon can cause you to restart the application unexpectedly.

If you made sure your system meets the necessary requirements, this is all that must be done for access to Horizon. Double-clicking the new shortcut will launch H.Net Horizon in its own browser window.

Tip: After Horizon has loaded, press the F11 key on your keyboard. This will put your web browser in full-screen mode.

Navigating in Horizon

In this section, we will go over many of the different screens, buttons, and options available in Horizon. After completing this section, you should be familiar with most of the tools and navigation options you will see throughout the software.

Logging In

When you first load Horizon, you will most likely be met with an information message displayed at the top left: Follow the directions to activate the application. You will not be able to type in the login area until it is activated.

Press SPACEBAR or ENTER to activate and use this control

When you have activated the control you may log in using the username and password you set up with your HMIS Administrator.

Once Horizon has loaded on your system, avoid the use of your browser's navigation buttons. Horizon is a standalone application and has its own navigation options.

Main Navigation Bar

On the left side of Horizon, you will find the Main Navigation Bar. This dynamic menu gives the appropriate choices depending on what area you are in the program.

The "Spinning H"

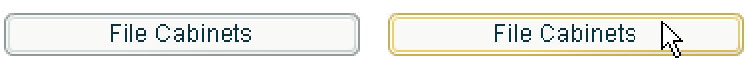
At the top-left of the Horizon application is a small status indicator called the "Spinning H."

This will animate while Horizon communicates with the server over the Internet. If it continues moving after a few moments, there may be a latency problem preventing communication. If this happens, try the following:

- Check to see if you can get to other web pages.
- Try to re-load the Horizon application by closing your web browser and opening it again.
- If you are able to access the Internet, but not Horizon, call or e-mail your HMIS Administrator to check on the server status.

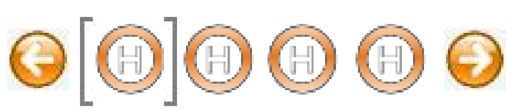
Mouse-over Buttons

You'll receive visual feedback in many ways while using Horizon. One of these effects is called a "mouse-over." This shows you which menu option will be launched when you click your mouse button.



Sliding Navigation Bar

Certain areas of Horizon utilize a sliding bar along the bottom to show you where you are in the question process. The "H" that corresponds to the current question will animate until you navigate to the next item.



You may skip to different questions by clicking directly on the "H" or by the left and right arrow buttons.

Note: Remember to click "Save" before going to the next question! Answers are not saved to the database until you save it. This allows you to save an item when you're certain it is answered correctly. Without this feature, you would not be able to skip past questions you're uncertain about at that time.

Data Grids

To display a list of data, Horizon uses a data grid. An example of this is the results from searching the Universal File Cabinet.

HorizonID	First Name	Last Name	SSN	Date of Birth
28495	Client	Example	111111111	1/1/1980
28508	Client2	Example	222222222	1/1/1980
28603	Client3	Example	333333333	1/1/1995

The grid is organized into rows and columns. Each column is labeled at the top by a heading. To sort the data in the grid, click the column heading once. To reverse the sort-order, click the column heading again.

What happens when you select an item in a grid depends on the area of the program. In some cases you will be taken directly to additional information. In others it may require you to press another option on the screen to work with the data you've selected.

Deleting Data Grid Items

In some areas, you'll have the option to delete items displayed in a Data Grid. When you choose this option you will not be asked for verification. Highlight the item to delete and click the delete button on the left side.

Date Prompts

For most date fields in Horizon, you will be able to choose a date using a mini-calendar. Click the icon next to the date field and use the arrows to choose the correct month, year, and day.

Saving Changes

When you have finished adding a client or modifying a record, you will notice a small animation letting you know your changes have been saved. This was added to assure you that your data was written to the database. Look for this text after clicking "Submit" or "Save."

Last 10 Clients

At the bottom left of Horizon, a drop-down list is constantly being updated with the last 10 clients you've dealt with. This provides a quick, simple way to jump from client to client without having to search for them each time. Simply click the drop down, choose the client, and click Go to be taken to that client's Basic Client Information Screen.

Logging Out

When you will not be using Horizon for awhile you may choose "Logout" at the top left of the application. This takes you back to the login screen. You may also close the browser window and your session will be automatically discontinued.

Tip: Using the "Logout" feature will retain the clients you recently visited in the "Last 10 Clients" area of Horizon until you close the browser windows completely.

File Cabinets

Unlike most data entry systems, Horizon begins by showing you something you're already familiar with. File cabinets are a visual representation of what the HMIS database really is. It is a very large file cabinet where you put your clients' files. One need only look at the first screen of Horizon to recognize what needs to be done next.

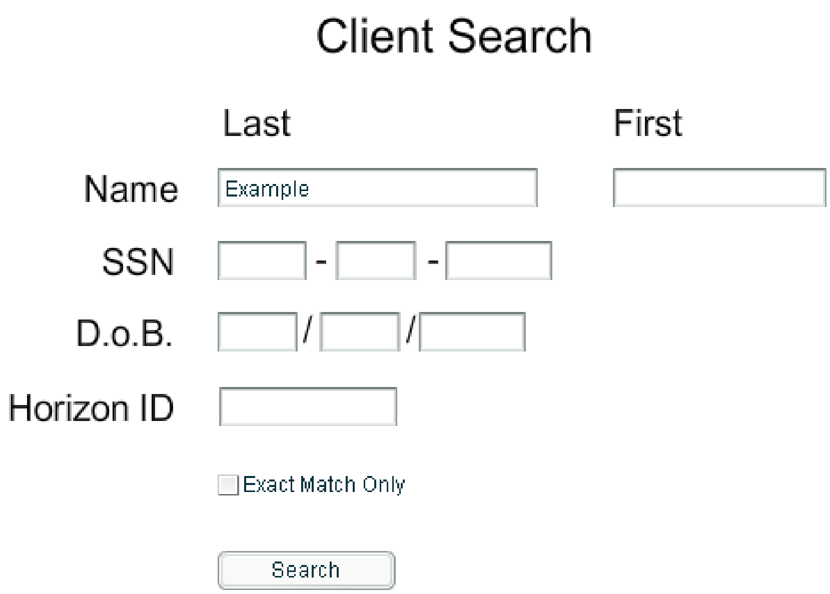
Universal File Cabinet

All data for the basic client information is stored in the Universal File Cabinet. It is not duplicated to any other part of the program. Any portion of the software that contains basic client information gets that data from here. In most cases, if you enter the information once, you will not be asked the same question somewhere else in Horizon.

Searching for Clients

Before anything else, including adding a new client, you must search for them in the Universal File Cabinet. You should never enter another record for a client if there is one already in the system.

Open the Universal File Cabinet and enter the last name of the individual you're looking for. If there are too many results, simply add more criteria. First name, SSN, DOB, and even the Horizon ID can be entered to narrow the search. If you're using the Horizon ID, you don't need to enter any other search terms. Click "Search" when you're ready to see the results.



Tip: Write the Horizon ID on your paper files so you may pull up the client in Horizon quickly and easily.

When you receive the list of results, you can either click on a record to open their Basic Client Information or add another client to HMIS if they're not in the system.

Adding a New Client

After you have determined the client isn't already in the system, the "Add New Client" option will be enabled. Click this option to be taken to a blank Basic Client Information screen.

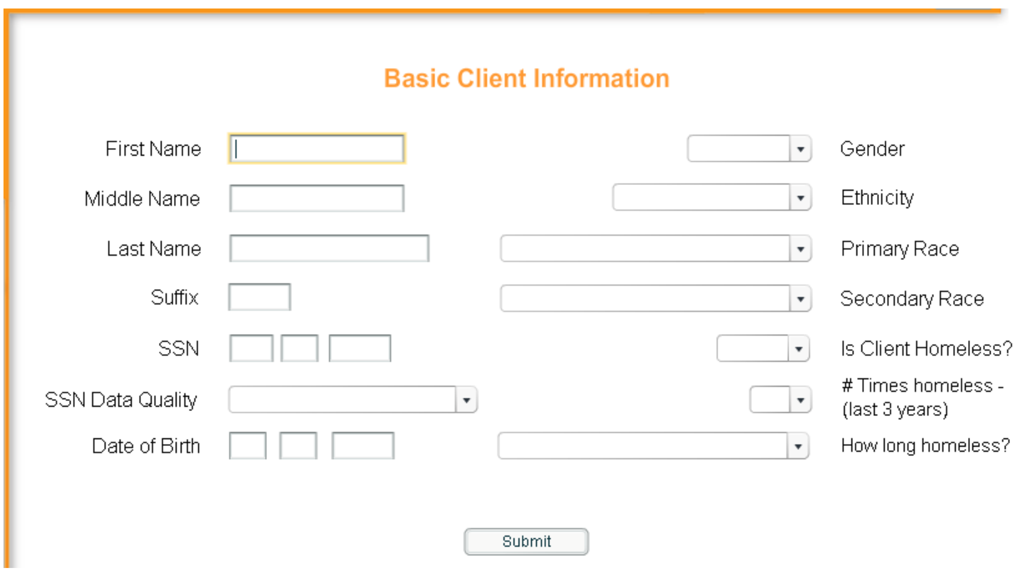
Personal File Cabinet

The Personal File Cabinet is not a separate database of clients. Think of it as a list of Favorites in your browser. It links to the Basic Client Information, but does not make a copy of it. When you click on a client in the Personal File Cabinet, it is essentially the same as searching for their Horizon ID in the Universal File Cabinet. This allows you to have quick access to only those clients who are already in your program

This list is populated automatically by adding clients to your program. Once you have removed them from your program, they will no longer show in your Personal File Cabinet.

Basic Client Information

The Basic Client Information is the first page filled out for any client in HMIS. It is comprised of normal, identifying information that you would collect during intake.



Required Fields

The following information is required in order to save a new record:

- First Name
- Last Name
- SSN Data Quality
- SSN (Dependant on SSN Data Quality Choice)
- Date of Birth
- Gender
- Ethnicity
- Primary Race
- Is Client Homeless?
- # Times Homeless

If you attempt to save a record without entering required information, you will be warned with a small pop-up window. The field name will be identified by turning red on the screen. Fill out the information and try to save again.

Note: H.Net Horizon implements a timeout feature throughout the program. You should be aware that any inactivity lasting longer than 20 minutes will reset your session and require you to log in again. You can see how much time is left at the top of the screen by your username. This will reset as you go from screen to screen in Horizon.

Optional Items

In the Basic Client Information screen, there are some items that are considered optional. Enter the information if you have it. The following items are considered optional:

- Middle Name
- Suffix
- Secondary Race

The SSN field is also optional, but only if the option for SSN Data Quality is marked as Don't Know or Refused.

Recording a Partial SSN is sometimes necessary when the entire SSN is unknown. In those cases, you must choose Partial SSN for the quality. You'll notice the SSN field is separated into 3 areas. You must know all the digits for each of those fields for that data to be valid. See example below of a person that only knows the last 4 digits. If they only know the last 3, leave it blank and choose Unknown as the quality.

Adding Clients to a Program

When you've finished a new addition to HMIS, or when you've found an existing client, a new button will become available at the top right. Clicking "Add To My Program" takes you to a screen that allows you to enter the client into any one of the programs under your organization. Choose the correct program, select the date, and click Submit. You'll be taken back to the Basic Client Information screen.

Choose which program to enter the client into.

Select the date the client entered the program.

Check Box

One of Horizon's features is called the "Checkbox." This is simply a visual reference to be able to tell if the client is or has been in your program at one time. Use the following key to determine the different variations of the checkbox.

- **No checkbox** – This means the individual is not, and has not been in your program at any time.
-  – This means the individual is currently in your program.
-  – This denotes a client who was in your program at one time, but has since been exited.

Release of Information

When you were first set up on the HMIS system, you should have been given a sample Release of Information document for use in your office. In some cases you may have one that was deemed acceptable that was written in-house. Regardless, any client entered into HMIS should have a ROI signed and on file. For data sharing purposes, you must enter the ROI information into Horizon. This is a simple, one-screen data entry item. To enter the ROI, click the button shown in the Basic Client Information screen.

- **Witness** – This field should correspond with the witness field on the paper ROI form. This is the person that witnessed the client sign the ROI form.
- **ROI Effective Date** – This is when the ROI became effective. Essentially, this is the date the client signed the ROI
- **ROI Expiration Date** – This is typically 3 years from the effective date. Your office may have a different form than the standard. In that case you may choose the correct date. Otherwise, leave this blank for the default of 3 years.

When finished, click Save. You will see the data update animation and can then move on to other areas of the program.

Client Program Data

In addition to the Basic Client Information, Client Program Data is where the rest of the HUD required information is entered. Each time a client enters your program, you must fill out this section completely to assure compliance with the HMIS Data Standards. This area can be found by clicking the button on the left side of the screen after they've been entered into your program.

Client Entry Records

When you added a client to your program from the Basic Client Information screen, you added an "Entry Record." As you will see, you may have one or more client entries to choose from. Click the appropriate one from the list of results displayed to edit the program data for that occurrence.

Completing the HUD Required Data

After choosing the correct client entry record, you will see a new screen with multiple questions and a navigation area at the bottom. You must answer each question in this area. Remember to click "Save" after answering each one. If you continue to the next question without saving, you will have lost the data just entered.

General Questions

Most of the questions and answers are simple and straightforward. For example, "Veteran Status" has the following options:

- Yes
- No
- Don't Know
- Refused

All general questions are displayed in a way that you could fill them out at intake if necessary. They are worded so that you may read the question from the screen and choose the appropriate answer.

Note: If you decide to choose "Other" on any one of these screens, you must give additional information. You will not be able to choose other without explaining that answer. Therefore, it is best to find the option that best fits the situation where available.

Income and Non-Cash Benefits at Entry

Some screens in this process will present a set of choices, a dollar amount, and an "Other" field. Income at time of Entry and Non-Cash Benefits are an example of such screens. On these types of screens, you may enter more than one item. Enter the data, and click Save for every income source or benefit the client is receiving at the time of entry. Each time an item is entered, it will be displayed in the data grid at the top.

Services Received

Similar to those screens, Services Received allows you to enter the service or services you provided to the client at the time of entry. You may enter as many items as you wish.

Client Notes

Another item you will find in each entry is the Client Notes feature. This area will allow you to type in simple case notes regarding that particular entry into your program. This is a quick and simple way to include any additional notes you may want to associate with that client's entry into the program.

Snapshots

Many pages within the Client Program Data include a button labeled "Snapshot" and "Snapshot History" at the bottom of the page. The Snapshots were added due to updated changes from HUD. The Snapshots record an ongoing history of the answers to the respective question.

New Snapshot   Snapshot History

To enter a new snapshot you click on "New Snapshot". To view the existing snapshots you can click on "Snapshot History". Snapshots will open in their own window, after you enter the data into the snapshot, select "Submit" and close the window with the X in the upper right corner of the window. Repeat this process to enter multiple snapshots.

The information you enter into the Snapshots will be a repeat of the information on the Horizon screen. The reason for this is the new HUD Data Standards are in a transitional phase and require data be entered in both places.

HPRP programs have two additional snapshots labeled "Financial Assistance" and "HR&S Services". These are located at the bottom of the Main Navigation Bar.

Financial Assistance Provided

HR&S Services Provided

Clicking Financial Assistance Provided or HR&S Services will open another window where you can choose to make a new Snapshot entry or view the Snapshot history. Like the other Snapshots throughout Horizon; enter the data, click submit and close the window with the X in the upper right corner of the window.

Exiting a Client

When a client has completed your program, you must exit them and answer the supporting questions for their stay and future destination. To get to the option to exit a client, go to their Client Program Data and choose the entry record you wish to exit. Then choose “Exit Client” from the main navigation bar.

Exit Client

Select the correct date using the calendar tool, and click “Save.” You will now see another series of questions that must be answered completely to exit the client. You will notice there are now questions regarding income and benefits at time of exit. This is where you can show what additional benefits the client is now receiving after completing your program. These questions operate the same as the Client Program Data. Some contain data grids; others are simple drop-down menu choices. Remember to complete and save each question and enter any Snapshots before going to the next one.

Tip: By answering all questions at entry and exit, you can show true results obtained through your program! For example, if a client was only receiving limited income when they first entered, showing what additional resources they have when leaving your program shows how you’ve helped the client.

Managing Households

Creating the Household

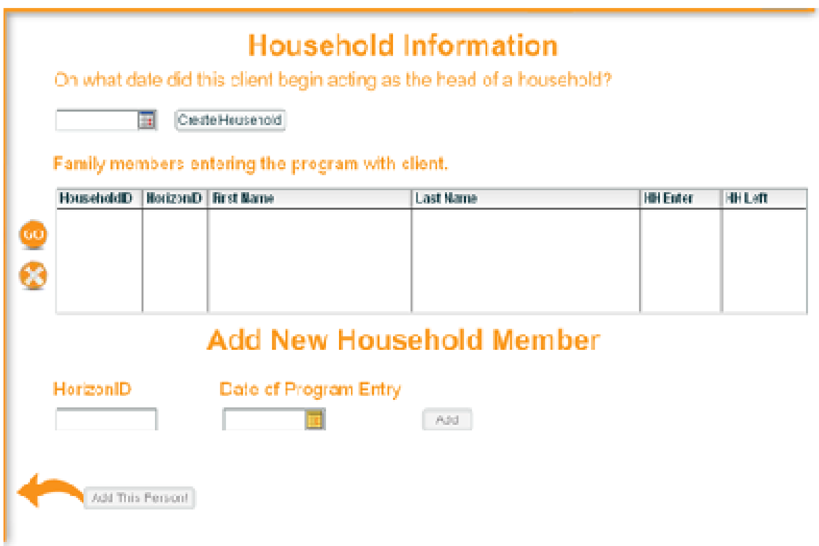
When creating a new household, be sure to enter all the clients in the Basic Client Information screen first. Take note of their Horizon ID numbers at the top left. You may add members to a household by manually typing in the Horizon ID or by using the “Last 10 Clients” feature.

Note: Do not choose the “Add To My Program” option on any of the household members at this time. An entry will automatically be created when they are associated with the Head of Household.

When you have entered the Basic Client Information for all the members, open the entry on the Head of Household's record of which you want to create the household. Choose the Household Info button to continue.

From this screen, you can view the existing information or create a new Household by choosing the date the client began acting as the Head of Household and clicking "Create Household."

If at any point you need to access a client's record that's listed here, simply highlight them and click the "GO" button.

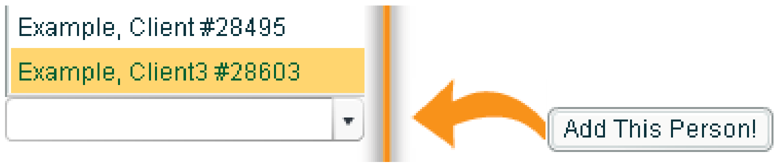


Attempting to access this screen from a client record that is already part of a Household will display information about the Household they're in and allow you to jump directly to the Head of Household's record.

Adding Members

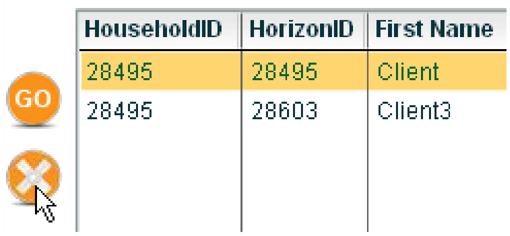
Once the Household has been created, you may now populate it with the clients belonging to it. To do so, simply type in the Horizon ID and choose the date they entered. Click "Add" when you are finished.

If you have been working with the clients you will be adding, you can use the “Last 10 Clients” option at the bottom to add them to the Household without having to remember their IDs.

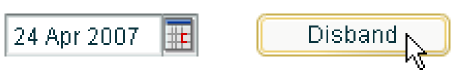


Removing Members

At any point, you may disband the Household by highlighting the Head of Household and clicking the “X.”

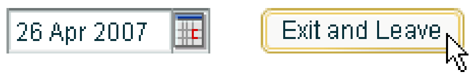


As stated on the screen, doing this will also exit every member of the household from your program except the Head of Household on the date specified.



You may remove the members of the Household in the same manner. However, you will be met with two different options:

- The client is leaving the household AND exiting the program on the date specified. In most cases this would not be necessary unless the household member is leaving without the head of household. This may also be used to update the household exit date of the client.



- Completely erase any association between this client and the household. This may be necessary if the wrong individual was added, or if the client never entered the program as expected. Any entry record with answered questions will also be invalidated by erasing in this manner.

Note: In some cases a client may be removed only to be added back to the Household at a later time. You should treat these as though they never left. Choose the same date you chose before removing them from the Household.

Exiting Household

To exit a Household and the members therein you must do so from the Head of Household's record. Open the Head of Household and go to "Client Program Data." Choose the correct entry and go to "Exit Client." Follow the resulting instructions to exit the client, and any associated Household members.

Custom Data Forms

One of the best things about a program like this is the ability to have Custom Data Forms available. These forms are for use by a variety of organizations. By using Horizon for the additional data, there is no need for data entry across multiple applications. This allows for one application, one database, and the same ease-of-use as the rest of Horizon. Additionally, you will have access to reports on that same data.

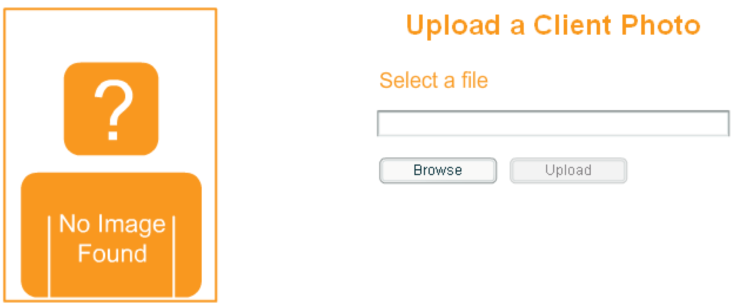
If your organization uses these custom forms, there are two main items that must be considered. First, if the data is already collected in the normal areas of Horizon it won't be available in a custom form. There is simply no use in duplicating data entry. Lastly, error checking will not be utilized. It will operate on the principal of "Garbage in Garbage out."

H.Net ID Cards & Shelter Clearance

Another portion of H.Net is the H.Net ID card program. This is a simple ID card created by a number of agencies around the continuum. This card has a standard bar code that can be read and used for many different applications. Its primary use at the time of this document's creation is to show if a client has been cleared of Tuberculosis. This is usually a requirement for staying at one of the area shelters. This section will explain how to create one of these ID cards.

Uploading a New Image

When you first click the H.Net ID Card button from client record, the image for that client will load on your screen. If there is no image available, a place-holder will be shown instead.



To upload a picture, one must simply click the "Browse" button. At that point you must locate the photo on your local system using the standard Windows dialog box. Once selected, click "Upload." Your photo will now be shown in the preview area.

Note: You should make every attempt to crop and center the client in the photo using the camera's software, or a graphics program such as paint.   Extremely large photos can cause undesired results. Be certain the file does not exceed 100 kilobytes in size.

Printing the H.Net ID

If a photo has been added to the client record, you will have a button available in the H.Net ID Card area.

Click this button to be taken to the ID card preview. From this screen you have a number of options. You should see the card showing their picture, name, and shelter clearance expiration. If there is no expiration, you must make sure the shelter clearance data has been entered by one of the appropriate organizations. Clicking "Print" from this screen will print the ID in the position noted by the label sheet preview at the bottom.

Label Position Adjustments

There is a small graphic by the print button that shows you where the ID card will be printed on the sheet of labels.

As you can see, the grey area is the next spot to be printed. If you put in a sheet which has already been used, you may manually advance this to a different spot. Otherwise, this position will auto-increment so that you don't need to choose it each time as long as you're re-using the same sheet.

Calibration Options

There are many factors that can cause the label to not print in the correct position on the sheet. Differences in printers and printer drivers have created the need for a calibration option within Horizon. If your ID cards are printing off-center, you may need to change these options. Click "Calibrate" to be taken to the calibration options.

X Y Offset

The X Y Offset adjustments will move the ID card up, down, left, or right. A visual representation of this can be seen as you make the adjustments.

Size Coefficient

Another function that is included is called the "Size Coefficient." We have found that some manufacturer's printer drivers simply will not conform to standard printing routines. If it seems like the X and Y settings just cannot resolve problems with label position, you may need to change this setting. Increase or decrease this option by .1 until it prints in the correct position.