



H.M.S. Notes

User's Guide

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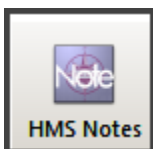
HMS Notes

General Information

HMS Notes is a software application that allows users to keep track of history and notes added to a tenant, applicant, unit, or landlord record. These notes can be automatically computer generated notes or user notes that are added manually by software users.

The user and computer generated notes/history can be viewed from the HMS Person Tracker (Notes Tracker) screen as shown below. This screen is available from many places within the HMS software and some of these places are explained below.

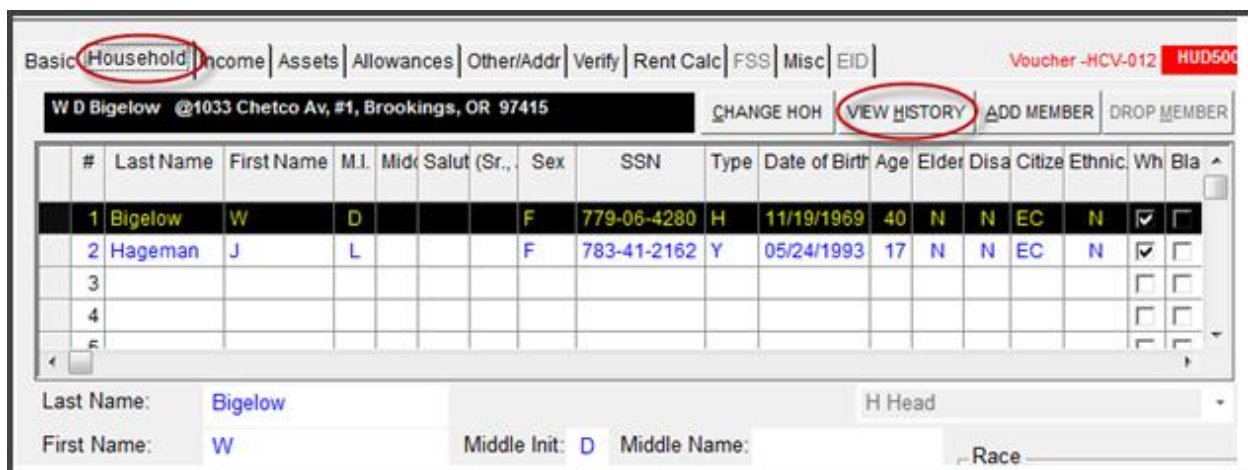
Pertains To	Staff	Action Note	Action Description	Code	Secure	User/Cx	Assign	Performed on
07/20/2010 3:05:09 PM	CHERYL	Release HOLD for Premier Property Management-Bigelow, Willow D	HOLD Requested For Payment	HRQ		C		07/20/2010 3:05:09 PM
07/12/2010 4:59:30 PM	CHERYL	HOLD - Both Starting: 08/01/2010 Waiting for Paperwork/Pending Contract Return	HOLD Requested For Payment	HRQ		C		07/12/2010 4:59:30 PM
07/12/2010 4:55:50 PM	CHERYL	New lease-up eff 07/01/2010; account on hold pending lease/contract return.	New Lease-up	New	N	U	CHERYL	07/12/2010 4:55:57 PM



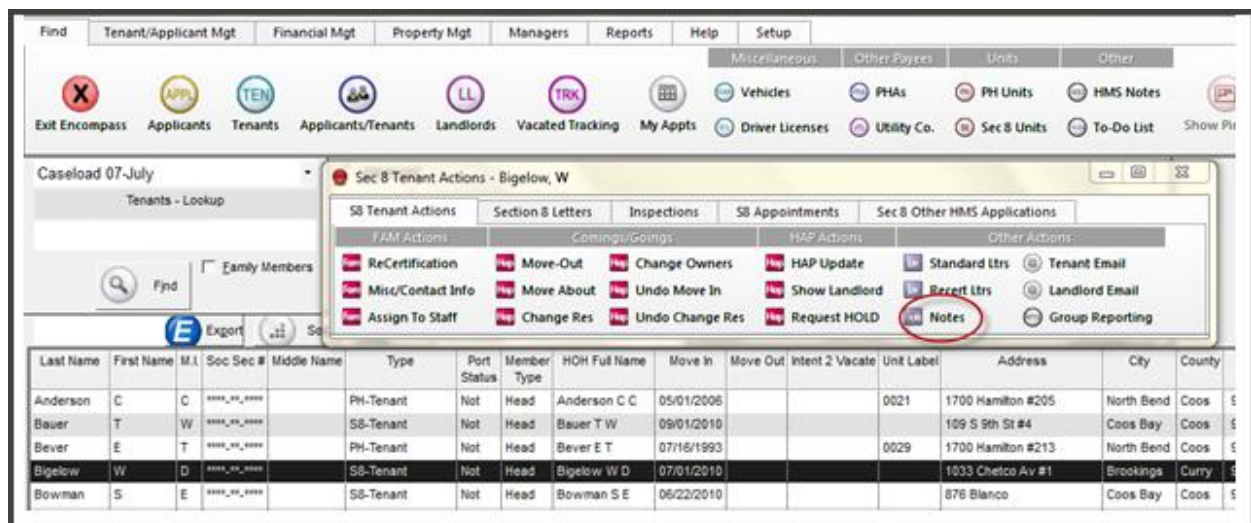
Notes can be accessed anywhere you see this icon. The icon is available when in an applicant, tenant, unit, or landlord record as shown below:



When looking at a tenant or applicant, HMS Notes can also be accessed from the Household tab by clicking on the **View History** button.

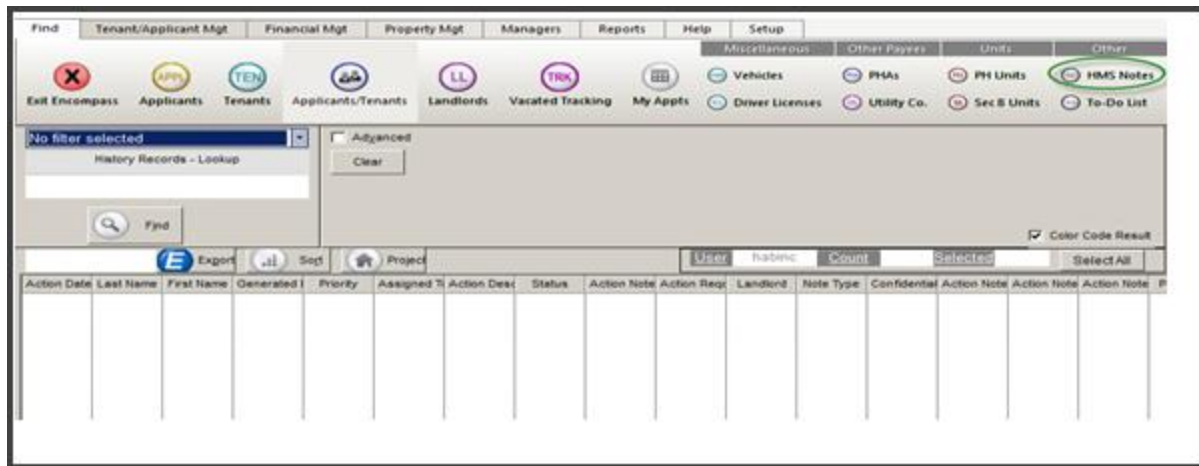


HMS Notes is also available from the **Encompass Action Bar**.

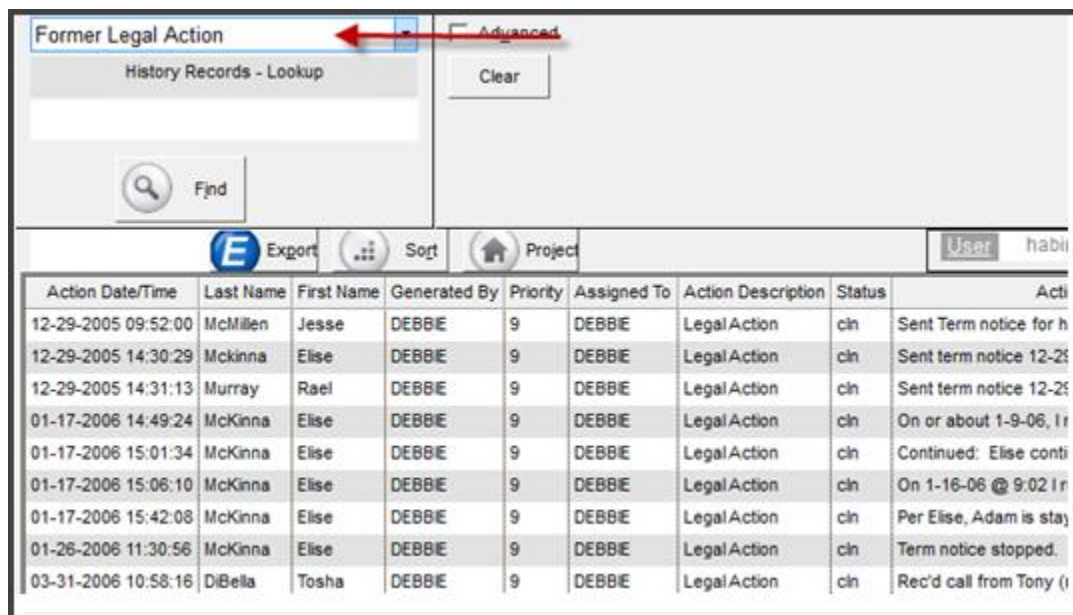


Accessing HMS Notes

Specific HMS Notes are available for searching and reporting with the use of filters in Encompass. In the example below, all the tenants having a note, **Former Legal Action**, are displayed by choosing the filter and clicking on **Find**.



The screenshot shows the Encompass HMS Notes search interface. The top navigation bar includes tabs for Tenant/Applicant Mgt, Financial Mgt, Property Mgt, Managers, Reports, Help, and Setup. Below this, there are icons for various filters: Exit Encompass, Applicants, Tenants, Applicants/Tenants, Landlords, Vacated Tracking, My Appts, Vehicles, Driver Licenses, PHAs, Utility Co., PH Units, Sec 8 Units, and HMS Notes (which is circled in green). The search area on the left has a dropdown menu set to 'No filter selected' and a 'Find' button. The main table area is currently empty.



The screenshot shows the Encompass HMS Notes search results. The filter 'Former Legal Action' is selected in the dropdown menu, indicated by a red arrow. The 'Find' button is highlighted. The table below displays a list of records with columns for Action Date/Time, Last Name, First Name, Generated By, Priority, Assigned To, Action Description, Status, and Action Note.

Action Date/Time	Last Name	First Name	Generated By	Priority	Assigned To	Action Description	Status	Action Note
12-29-2005 09:52:00	McMillen	Jesse	DEBBIE	9	DEBBIE	Legal Action	cln	Sent Term notice for h
12-29-2005 14:30:29	McKinna	Elise	DEBBIE	9	DEBBIE	Legal Action	cln	Sent term notice 12-25
12-29-2005 14:31:13	Murray	Rael	DEBBIE	9	DEBBIE	Legal Action	cln	Sent term notice 12-25
01-17-2006 14:49:24	McKinna	Elise	DEBBIE	9	DEBBIE	Legal Action	cln	On or about 1-9-06, I r
01-17-2006 15:01:34	McKinna	Elise	DEBBIE	9	DEBBIE	Legal Action	cln	Continued: Elise conti
01-17-2006 15:06:10	McKinna	Elise	DEBBIE	9	DEBBIE	Legal Action	cln	On 1-16-06 @ 9:02 I r
01-17-2006 15:42:08	McKinna	Elise	DEBBIE	9	DEBBIE	Legal Action	cln	Per Elise, Adam is sta
01-26-2006 11:30:56	McKinna	Elise	DEBBIE	9	DEBBIE	Legal Action	cln	Term notice stopped.
03-31-2006 10:58:16	DiBella	Tosha	DEBBIE	9	DEBBIE	Legal Action	cln	Rec'd call from Tony (i

NOTE: Any note can be reported on here by using a filter. Remember: Call support to request additional filters.

Of course, clicking on a tenant, will bring up the HMS Notes maintenance screen as shown below.

HMS Person Tracker

HMS Notes | Community Service | Attachments | Name: Mudge, M / 783.96.9232

Type Of Notes To Display: ☐ User ☐ Computer ☒ Both

☒ Include Confidential Notes ☐ Include Family Notes

Actions: Add Modify Delete Print

History/Archive: ☒ History ☐ Archive

Pertains To	Staff	Action Note	Action Description	Code	Secure	User/Cr	Assign	Performed on
01/17/2006 2:49:24 PM	DEBBE	On or about 1-9-06, I rec'd a call from Elise asking about taking her off the lease & adding Melissa's sister. I explained that they are currently in violation and have an eviction pending. They need to remedy the violation by removing the unauthorized persons from the HH immediately and supply proof as to where they relocated to, such as a rental agreement, etc. She said she will fix the violation. On 1-10-06, Elise submitted copies of mail that Adam Brunner has received in the past couple months @ another address, actually 2 other addresses. Elise also sent a note asking for paperwork to put someone on the lease and to remove someone. The next day or so, I spoke with Elise again. She was asking about removing herself becuz she w/b moving to another unit (Chandler). I told her that she must be in compliance with her current lease in order to be eligible for another program through our office. I told her she needs to remedy the violation by 1-16-06. She said she will.	Legal Action	LEG	N	U	DEBBE	01/17/2006 3:19:29 PM
01/13/2006 11:50:09 AM	DEBBE	Legal Status Changed To In Process/ACCEPT NO PYMNT	TAR Legal Status Change	SCL		C		01/13/2006 12:07:54 PM

Exit (ESC) Save (F3) (F6) Next E E-Mail Letter

Adding, Modifying, and Deleting Notes

To add a note to a persons record click on the **Add** button from the WinNotes/History Screen. To **Modify** or **Delete** a note highlight it and click on the appropriate action.

Type Of Notes To Display: ☐ User ☐ Computer ☒ Both

☒ Include Confidential Notes ☐ Include Family Notes

Actions: Add Modify Delete Print

History/Archive: ☒ History ☐ Archive

The note page then opens up. Type the note in the notes field. Note the 1,016 character limit. Check the **Note is Confidential/Secured** field if the note is confidential. Only users with access to view the confidential notes will be able to do so. The **Action Date/Time** can be changed but the **Create Date/Time** cannot and is set to whenever the note is saved. Users must choose an **Action Code** which is the type of note that is being entered. The **Action Required** must also be chosen. Users can also assign the notes to other staff members. When doing this, the note will appear in the **To Do** list for that staff member. The status of the note can also be set on this screen.

Add/Changes History Item

Historical Activity For: **Carlson, BettyA**
Person

Action Date/Time: **07/20/2005 3:27:25 PM** Create Date/Time:

Action Code: **Phone Call from Person** ☐ Note Is Confidential/Secured

Notes(1,016 Character Limit) **0**

← **Type the note here**

Taken By: **HABINC** Assign To: **HABINC** Action Required: **Call Person Back**

Current Status: **Closed Note** Priority: **9** 2486

Priority of a note can be used to set up priorities according to procedure. Example #1 being

Action Codes, Action Required, and Current Status

Add/Changes History Item

Historical Activity For: **Carlson, BettyA**
Person

Action Date/Time: **07/20/2005 3:27:25 PM** Create Date/Time:

Action Code: **Phone Call from Person** ☐ Note Is Confidential/Secured

Notes(1,016 Character Limit) **0**

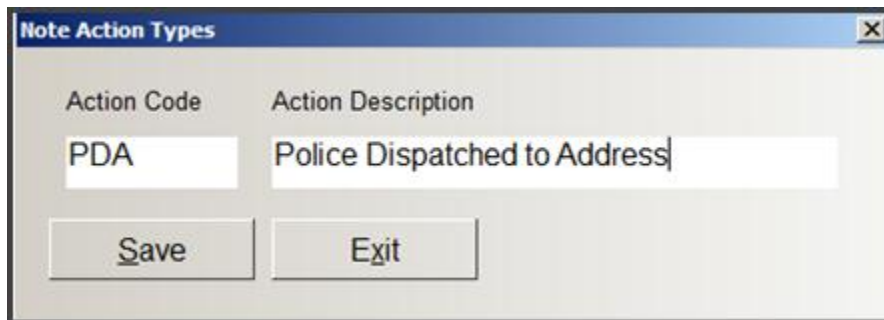
Taken By: **HABINC** Assign To: **HABINC** Action Required: **Call Person Back**

Current Status: **Closed Note** Priority: **9** 2486

Action Codes, Action Required, and Current Status can all be added for use by each Housing Authority by clicking on the **New** button by each option.

These options are all able to be secured in HMS Secure.

The following screen will open and an unique **Code** and **ActionDescription** can be entered. These will be available to choose in the 'Action Code' dropdown.




Caution: be sure to keep your action codes simple and to limit who has access to change/update these!

To Do List

The 'To-Do' list will bring up any notes that were assigned to the user who is logged in. For example if the staff member had a meeting and a tenant called during that time the person who took the call could record a note and assign it to that staff member. After the meeting the user would go into his or her 'To-Do' List and see that tenant had called.

History Records - To Do List - Lookup

Find

☐ Advanced

Clear

	 Export	 Sort	 Project		 User habinc	 Count 1	 Select	
Action Date/Time	Last Name	First Name	Generated By	Priority	Assigned To	Action Description	Status	Action Notes
04-16-2011 15:33:11	Mudge	M	HABINC	9	HABINC	Phone Call from Person	opn	Called about lease - has income change. Please

To open up a Note or tenants history simply double click on the person's name.

Add/Changes History Item

Historical Activity For: Person (Applicant/Tenant)

Action Date/Time: Create Date/Time:

Action Code: ☐ Note Is Confidential/Secured

Notes(1,016 Character Limit):

Taken By: Assign To: Action Required:

Current Status: Priority:

Reports

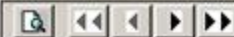
There are a number of reports users can run from the main HMS Notes screen. The examples shown below are the 'Daily Log' and 'By Action.'

Find	Tenant/Applicant Mgt	Financial Mgt	Property Mgt	Managers	Reports	Help	Setup
Vehicle/Miscellaneous In...	Notes and History			Community Service		User Reports	
☐ Misc Information ☐ Car Tags/Tenants ☐ Car Tags/Applicants	☒ Master Report ☐ Daily Log ☐ By Action	☐ By Person/Date ☐ Complete History ☐ Landlord History	☐ Generate Rqd ☐ View Rqd ☐ Current Hrs Left	☐ Detail Current ☐ Detail Former ☐ Summary Form	☐ Summary List ☐ Tenants Eligible	☐ Tenant ☐ Financial ☐ Report Registry	Help

Unify Report Builder - F:\apps\hms\reports\hsbydate.qrp				
File View Print				
04/18/2011 1:45:17 PM habine				
H.M.S. for Windows winHIST - History Daily Log of History Notes				
Date	Name	Action	Staff	Note/Comments
	Barr, Patricia	Original Application	TEMP	Original Application inserted. Master App ID:
	Fullmer, Janet	Original Application	LISA	Original Application inserted. Master App ID:
	Rico, Mary F	Original Application	TEMP	Original Application inserted. Master App ID:
	Williams, Heather S	Original Application	TEMP	Original Application inserted. Master App ID:
	Szwarc, Steven	Original Application	TEMP	Original Application inserted. Master App ID:
	Lee, Mai T	Original Application	LINDA	Original Application inserted. Master App ID:
	Hadged, Samaher	Original Application	TEMP	Original Application inserted. Master App ID:
	Knecht, Russ	Original Application	LISA	Original Application inserted. Master App ID:
	Staff, Connie	Original Application	VALORIE	Original Application inserted. Master App ID:
	Stewart, Don W	Original Application	TEMP	Original Application inserted. Master App ID:
	White, Christine	Original Application	TEMP	Original Application inserted. Master App ID:
	Neville, Geraldine	Original Application	DI	Original Application inserted. Master App ID:

Unify Report Builder - F:\apps\hms\reports\hsbytype.qrp

File View Print



04/18/2011
1:46:33 PM
habine

H.M.S. for Windows
winHIST - History
History Notes by Type of Action

1

Date	Name	Staff	Note/Comments
Applicant Address updated from Move-in Wizard			
01/02/2007 2:26:37 PM	CARR, SHIRLEE	TAMMY	Applicant address updated from PH Move-In. Applicant address was 415 BAYBERRY WAY GRIDLEY CA 95948
01/02/2007 3:18:31 PM	Hall, Marliesa	MELISSA	Applicant address updated from SS Move-In. Applicant address was
01/02/2007 4:48:20 PM	Parsley, Carole	PAM	Applicant address updated from SS Move-In. Applicant address was 14211 Sherwood Cir Magal CA 95954
01/03/2007 11:55:25 AM	Ventrello, Frank	PAM	Applicant address updated from SS Move-In. Applicant address was 308 700 Salem St Chico CA 95928
01/03/2007 3:07:37 PM	Wenner, Dale	PAM	Applicant address updated from SS Move-In. Applicant address was #109 700 Salem St Chico C 95928
01/03/2007 3:30:48 PM	Lewis, Carolyn	MELISSA	Applicant address updated from SS Move-In. Applicant address was
01/04/2007 1:11:26 PM	Voe, Tria	MELISSA	Applicant address updated from SS Move-In. Applicant address was
01/05/2007 9:29:30 AM	Crossman, John	PAM	Applicant address updated from SS Move-In. Applicant address was #203 700 Salem St Chico C 95928
01/05/2007 10:50:42 AM	Lewis, Alma	PAM	Applicant address updated from SS Move-In. Applicant address was #209 700 Salem St Chico C 95928

Staff Access/Security

Each user for WinNotes must have a unique employee id number, which is setup in the Staff-Tenant section under the Setup tab. The system administrator must also go there or to HMS Secure to grant/deny access to Notes.



Check each users name that is going to be using HMS Notes.

User Login	User Name	Department	H.M.S. Software - Tenants Applications													
			winRPT	win1099T	winATT	winCS	winFAM	winFSS	winHAP	winLTR	winNOTES	winRR	winRSS	winSTATS	winTAR	winTRAK
amy	Amy Anyone	Un-Assigned	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
ann	Ann Miller	Front Line Mgt	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
anna	Anna New	Worker Bees	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	
blaine	Blaine The Train	Worker Bees	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	

Other features of HMS Notes can be granted/restricted from HMS Secure as listed below:

Buttons | Menus | Access | Tabs | Setup | Check Boxes/Other | Report

H.M.S. Item Security

H.M.S. Application

winNOTES

HMS Tenant - winNOTES

User:

Amy Anyone

amy

Turn On/Off Row(s)/Column(s)

Turn On

Turn Off

Copy Functions

Template To User(s)

Un-Assigned

Save

Exit

Object_Name	Item Description	Dept & User Rights - Button		Object_Type	Application	Deny Access To NEW User?
		Un-Assigned	Amy Anyone			
dlgViewofPerson.attADD	Button - Add Attachments	☒	☒	BUTTON	winNOTES	☐
dlgHistoryEntry.NewCode	Button - Add New History Codes/Descriptions	☒	☒	BUTTON	winNOTES	☐
dlgHistoryEntry.NewActionReqd	Button - Allow ADD of new Action Required codes?	☒	☒	BUTTON	winNOTES	☐
dlgHistoryEntry.NewAction	Button - Allow ADD of new Action Type codes?	☒	☒	BUTTON	winNOTES	☐
dlgHistoryEntry.NewStatus	Button - Allow ADD of new Note Status code?	☒	☒	BUTTON	winNOTES	☐
dlgHistoryEntry.Save	Button - Allow SAVE of history notes	☒	☒	BUTTON	winNOTES	☐
dlgViewofPerson.change	Button - Change existing history record for person	☒	☒	BUTTON	winNOTES	☐
dlgViewofPerson.attDELETE	Button - Delete Attachments	☒	☒	BUTTON	winNOTES	☒
frmNOTESSystem.filter	Button - Filter (Add Chg Delete)	☒	☒	BUTTON	winNOTES	☐
dlgViewofPerson.attMODIFY	Button - Modify Attachments	☒	☒	BUTTON	winNOTES	☐
dlgViewofPerson.attOPEN	Button - Open Attachments	☒	☒	BUTTON	winNOTES	☐
dlgViewofPerson.attPRINT	Button - Print Attachments	☒	☒	BUTTON	winNOTES	☐
dlgViewofPerson.attSAVEAS	Button - Save As Attachments	☒	☒	BUTTON	winNOTES	☐
dlgViewofPerson.infoShowFamily	Button - Show Family Members	☒	☒	BUTTON	winNOTES	☐
dlgViewofPerson.infoShowIncome	Button - Show Income	☒	☒	BUTTON	winNOTES	☐
frmNOTESSystem.sort	Button - Sort	☒	☒	BUTTON	winNOTES	☐

Purge History

This option is used to compress old history records and is located under the Setup tab in Encompass:



Once records have been purged they are placed in an archive file. That file can be viewed if needed, but will not show up on the tenant's records. This option is used when the system is slowed down because of so many history/note records. Users or system administrators can purge records within a certain time period, for example, all records between January 1, 2010 thru December 31, 2010. Also, a specific action code can be purged which will include every record that uses that action code. Another option would be to purge a staff members notes. Choose the records to be purged then click on the Purge button and the records are then saved to the archive file.

