HMIS Workflow: Shelters Module

Contents

Shelters Module Workflow

## Using Shelters Module to Enroll Client

 A.   ***Home Dashboard***

  1.   Log into HMIS

  2.   Click **Enter Data As** then click the plus ⊕ next to the project for which you are entering data

  3.   If needed - Set **Back Date Mode** for the date that the update was completed

  4.   Click '**Shelters**' from the left side menu (**do not use 'Clients'!**)

   a.   Once a client is assigned a bed via '*Shelters*' workflow, a project entry is automatically created

    •   If a client is also enrolled via '*Clients*', they will have duplicate enrollments for the same time period – resulting in reporting errors
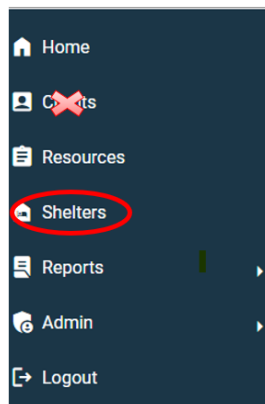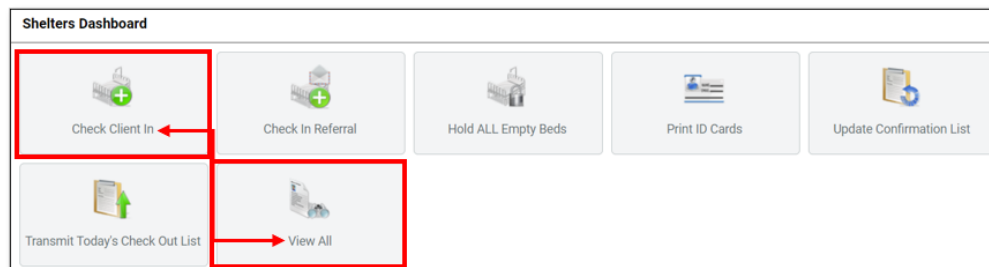

 B.   **Select the Bed/Unit to Enroll Client**

  1.   If the project has multiple '*Unit Lists*', select the appropriate list
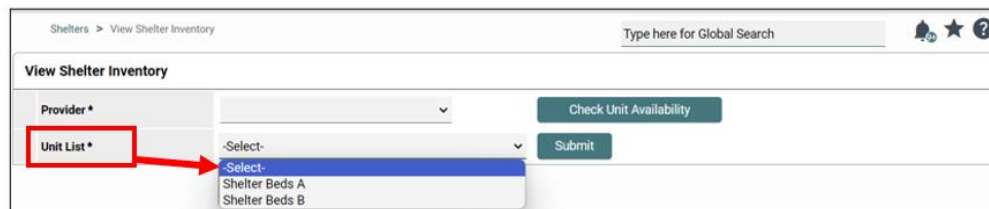
  2.   To view available inventory, click either 'Check Client In' or 'View All'

  3.   Identify an empty bed to assign client to & click the ⊕ on the left to enroll

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C. Client Search & Enrollment

** Always Begin with Head of Household **

1. Enter Head of Household's Name &/or partial SSN
2. Click **Search**
   a. If a match is found, confirm the details match the client's name, date of birth, and social security number. If it is the same person, **plus** ⊕ to the left of the client's name
   b. If no matches are found, try at least two other ways to search for the client (partial name, alias, or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, and click **Add New Client with This Information**

3. Confirm that the '*Date In*' and '*Unit Name/Number*' is correct (**never alter the time!**)

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Unit Entry Data - (9) Client, Test 1

Date In *	08 / 27 / 2024
Unit Name / Number	Men's Shelter Beds / 1 / Bed 001
Supplies Given	
Locker number	
Codes/Notes	

Midnight Check In | Assign Unit | Change | Clear

4. Enrolling a **single individual**:
    a. Complete the Entry assessment
    b. Click **Save & Exit**

Save | Save & Exit | Exit

   c. Continue to section *E. Review Enrollment Information*
5. Enrolling **additional household members** continue to section *D. Enrolling Additional Household Members*

D. *Enrolling Additional Household Members*

NOTE! If the client is presenting as a single individual, skip this section

1. Expand the '*Households Overview'* section

2. If the household has previously been created, click **Manage Household** to verify/update household details

3. If no household appears, click **Start New Household**

   a. Select appropriate '*Household Type'*
   b. Search for each additional household member(s)
      - Enter household member's Name
      - Click **Search**

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- o If a match is found, confirm the details match the household member's name, date of birth, and social security number. If it is the same person, click on the **plus** ⊕ to the left of that client's name
- o If no matches are found, try at least two other ways to search for the client (partial name, alias or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, and click **Add New Client with This Information**

c. Repeat the search until all household members are listed in the '*Selected Clients*' section

d. Click **Continue**

e. Select **Head of Household: YES/NO** and **Relationship to Head of Household** for each Household member (NOTE: For the HoH, when YES is selected, the Relationship to HoH will auto-pop to 'self')

f. Click **Save**

g. Starting with the HoH, complete Entry assessment for each HH member
- • Click the name of the HH member on the left

- • Complete assessment
- • Click **Save**

- • After completing the Entry assessment for the final HH member, click **Save & Exit**

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4. Assign each addt'l HH member to a Bed/Unit
   a. Under '*Household Members*', click **Assign Unit**

   b. From the drop down, choose a bed

   c. Click **Select**
   d. Repeat until each HH member has been assigned a bed
   e. Scroll to bottom of page, click **Save & Exit**

E. *Review Enrollment Information*
   1. You will now be taken back to the '*Unit List*'
      a. From the '*Unit List*' you can easily identify if clients have been entered as a single client or as part of a household
         • **Enrolled as part of a HH = Group ID #** - this should be the same number for each member of the household
         • **Enrolled as a single client = No Group ID #**

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Interim (Update/Annual Assessment)
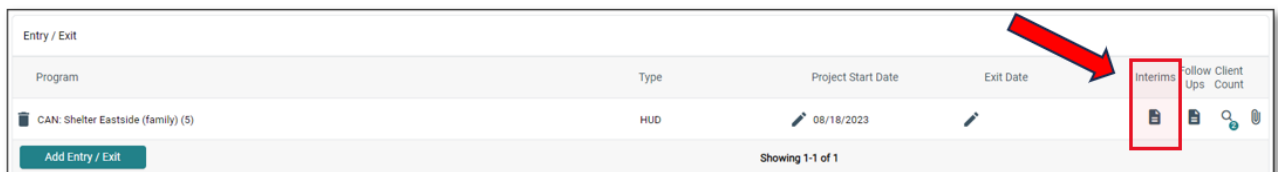
A. **Home Dashboard**
1. Log into HMIS
2. Click **Enter Data As** then click the plus ⊕ next to the project for which you are entering data

B. **Client Search**
1. Click on **Clients**
   - **NOTE!** Data entry via **Clients** is *only* used when recording an Interim update
2. Enter the head of household's HMIS ID number or search by the head of household's name
3. If needed - Set **Back Date Mode** for the date that the update was completed

C. **Entry/Exit**
1. Click **Entry/Exit** tab
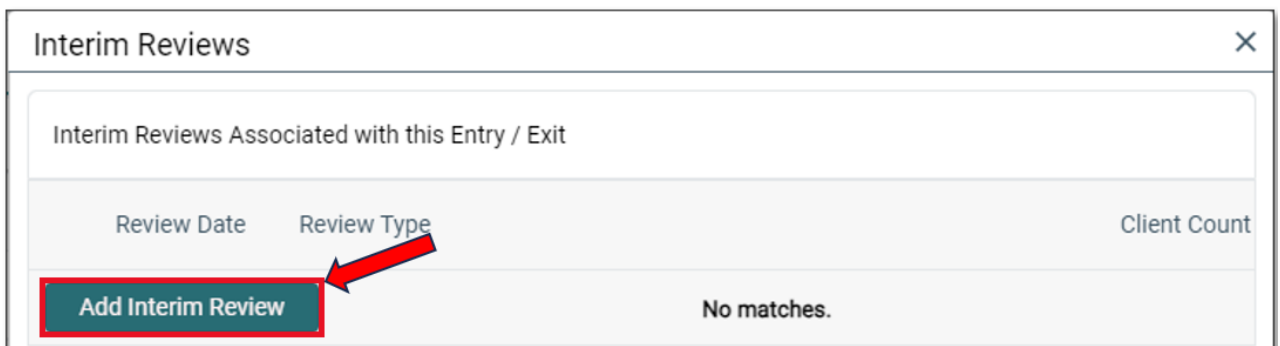2. Click **Interim** icon listed within your project's row

3. Click **Add Interim Review**

4. **Complete Interim Review Data**
   - If there is more than one household member served in the project, *check the box next to each additional household member* that the information applies to.
   - Select the *Interim Review Type*
     - **Update**: completed anytime information has changed since project entry
     - **Annual Assessment**: required assessment for all clients remaining in a project after one year
       - Annual Assessments must be completed within 30-days prior to or 30-days after the **Head of Household's** project start anniversary date (example: if the HoH entered the project on 3/17/2022, the Annual Assessment would need to be completed between 2/15/2022 and 4/16/2023)
   - Confirm the **Review Date**
   - Click **Save & Continue**

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5. Update assessment information
6. Click **Save & Exit** once all assessments for all household members have been complete

Shelters Module Exit

A. *Home Dashboard*

1. Log into HMIS

2. Click **Enter Data As** then click the plus ⊕ next to the project for which you are entering data

3. If needed - Set **Back Date Mode** for the date that the update was completed

4. Click '**Shelters**' from the left side menu (**do not use 'Clients'!**)

   - Once a client is assigned a bed via '*Shelters*' workflow, a project entry is automatically created
     - If a client is also enrolled via '*Clients*', they will have duplicate enrollments for the same time period – resulting in reporting errors
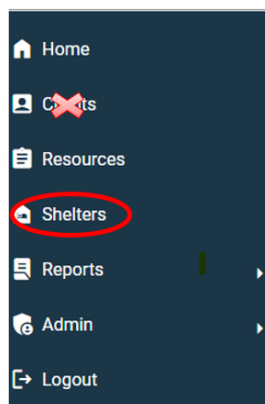
B. **Select the Client to Exit**

1. If the project has multiple '*Unit Lists*', select the appropriate list

2. Locate the client to be exited from project & click the red circle/minus 🔴 to the left
   - ***Always start with the HoH record when exiting a household!***

3. Complete Exit Information
   a. If there is more than one client exiting, *check the box* next to each additional household member that is exiting the project
   b. Confirm the **Date Out**
   c. Select **Reason for Leaving**
   d. Select **Destination**
   e. Click **Save & Continue**

4. Complete Exit assessment for each HH member exiting project
5. Click **Save & Exit** once all assessments for all household members have been completed

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