

HMIS Workflow: Shelters Module

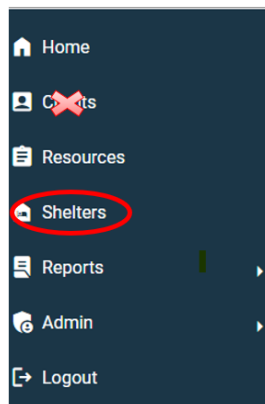
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Using Shelters Module to Enroll Client

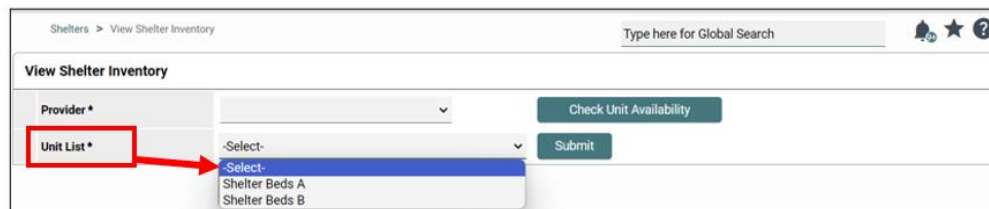
A. Home Dashboard

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

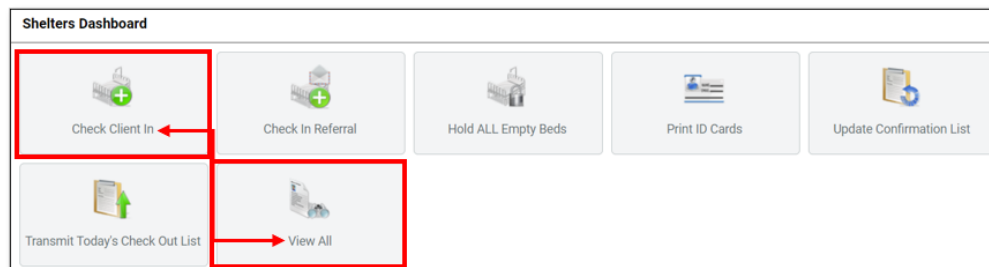


B. Select the Bed/Unit to Enroll Client




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

Shelter Inventory Information											
Unit List - Shelter Beds B											
Display All Beds						Sort By Floor		Ascending		Sort	
Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes	
	Men's Shelter Beds	1	Bed 001	Hold	EMPTY						
	Men's Shelter Beds	1	Bed 002	Hold	EMPTY						
	Men's Shelter Beds	1	Bed 003	Hold	EMPTY						
	Men's Shelter Beds	1	Bed 004	Hold	EMPTY						

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**

Shelters > Client Search

Type here for Global Search

Client Search

Please Search the System before adding a New Client.

Name: First Middle Last Suffix

Name Data Quality:

Alias:

Social Security Number:

Social Security Number Data Quality:

U.S. Military Veteran?:


Exact Match: ☐

Search **Clear** **Add New Client With This Information**

2a. If correct client is found, click

to check that Client in. **Submit**

Client Results

ID	Name	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
	9 Client, Test 1	123-00-4567	01/01/1976				0

2b. If client is NOT found, fill in all info & click

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

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**:

- Complete the Entry assessment
- Click **Save & Exit**

Save Save & Exit Exit

- 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

Households Overview

This Client is not currently a member of any Households.

Search Existing Households Start New Household

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

Households Overview

(15) Female Single Parent

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(52) 2, Test Female	44	Yes	Self	08/27/2024	0	2
(50) Child, test 2	6	No	Daughter	08/27/2024	0	2


Manage Household

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

Households Overview

Search Existing Households Start New Household

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

- 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
 - 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')



Household Information - (13) Male Single Parent

(13) Male Single Parent

Household Type * Male Single Parent

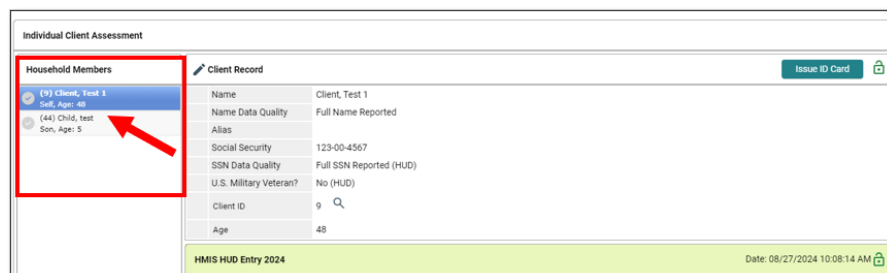
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Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(9) Client, Test 1	48	Yes	Self	08 / 27 / 2024	0	1
(44) Child, test	5	No	Son	08 / 27 / 2024	0	1

- 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



Individual Client Assessment

Household Members

- (9) Client, Test 1
- (44) Child, test

Client Record

Name Client, Test 1

Name Data Quality Full Name Reported

Alias

Social Security 123-00-4567

SSN Data Quality Full SSN Reported (HUD)

U.S. Military Veteran? No (HUD)

Client ID 9

Age 48

HMIS HUD Entry 2024 Date: 08/27/2024 10:08:14 AM

- Complete assessment
- Click **Save**



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



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

▼ Household Members

To include Household members in this Check In, click the box beside each name. Then assign each member a unit. If no unit is available, an Overflow unit will be used. Note: Only members from the same Household may be selected.

(13) Male Single Parent

☐ (9) Client, Test 1

☒ (44) Child, test

Assign Unit

Assign Unit

- b. From the drop down, choose a bed

Unit List

Shelter Beds B

Bed -Select-

Select Cancel

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

Save Save & Exit Exit

Shelter Inventory Information

Unit List - Shelter Beds B

Display All Beds Sort By Floor Ascending Sort

Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
08/27/2024	Men's Shelter Beds	1	Bed 001		(9) Client, Test 1	01/01/1976	Man (Boy, if child)	22	No	
08/27/2024	Men's Shelter Beds	1	Bed 002		(44) Child, test	01/01/2019	Man (Boy, if child)	22	No	
08/27/2024	Men's Shelter Beds	1	Bed 003		(46) Adult, test 2	02/01/1976	Man (Boy, if child)		No	
	Men's Shelter Beds	1	Bed 004	Hold	EMPTY					
	Men's Shelter Beds	1	Bed 005	Hold	EMPTY					

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 #**

Shelter Inventory Information

Unit List - Shelter Beds B

Display All Beds Sort By Floor Ascending Sort

Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
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	Men's Shelter Beds	1	Bed 004	Hold	EMPTY					
	Men's Shelter Beds	1	Bed 005	Hold	EMPTY					

Interim (Update/Annual Assessment)

A. Home Dashboard

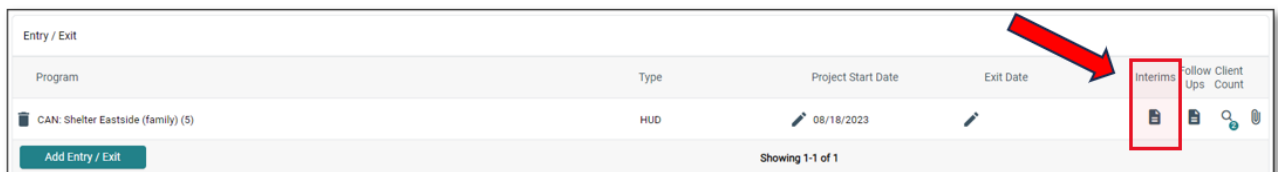
1. Log into HMIS
2. Click **Enter Data As** then click the plus **+** next to the project for which you are entering data

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

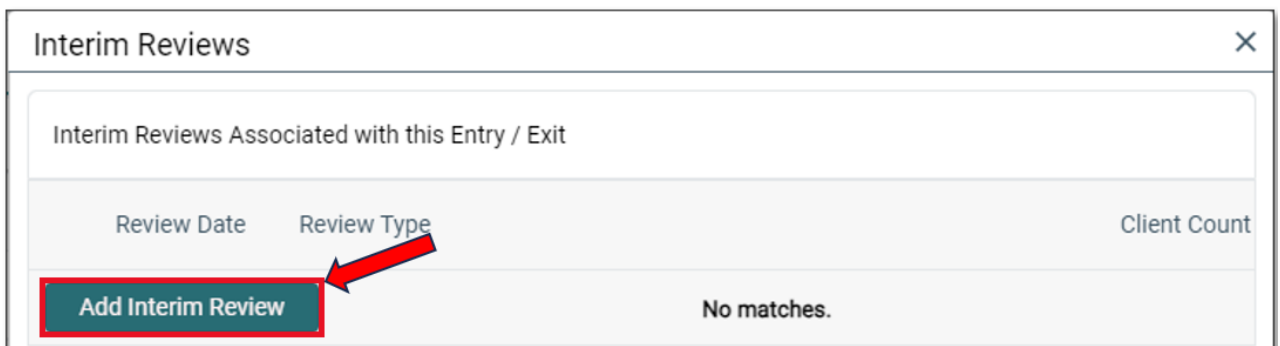


Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
CAN: Shelter Eastside (family) (5)	HUD	08/18/2023				

Add Entry / Exit

Showing 1-1 of 1

3. Click **Add Interim Review**



Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
Add Interim Review		
No matches.		

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**

Add Interim Review - (10) test, test

Household Members

To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name.

☐ (4) Female Single Parent

☐ (10) test, test (Entry Date: 08/18/2023 3:08 PM)

☒ (15) test, child (Entry Date: 08/18/2023 3:08 PM)

Interim Review Data

Entry / Exit Provider	CAN: Shelter Eastside (family) (5)
Entry / Exit Type	HUD
Interim Review Type *	-Select-
Review Date *	08 / 19 / 2023 2 : 51 : 19 PM

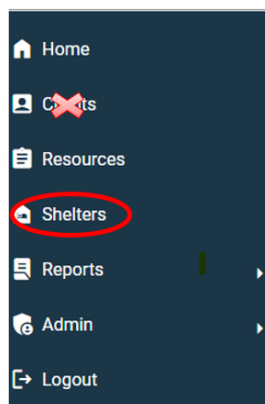
Save & Continue Cancel

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

Shelters > View Shelter Inventory

Type here for Global Search

View Shelter Inventory

Provider *

Unit List * -Select- Shelter Beds A Shelter Beds B

Check Unit Availability

Submit

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!**

Shelter Inventory Information

Unit List - Shelter Beds B

Display All Beds Sort By Floor Ascending Sort

Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.	Codes/Notes
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	Men's Shelter Beds	1	Bed 004	Hold	EMPTY					
	Men's Shelter Beds	1	Bed 005	Hold	EMPTY					

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**

Edit Exit Data - (10) test, test

Household Members

To update Household members for this Exit Data, click the box beside each name.

☐ (4) Female Single Parent

☒ (10) test, test

☐ (15) test, child

Edit Exit Data - (10) test, test

Exit Date * 08 / 19 / 2023 3 : 12 : 33 PM

Reason for Leaving -Select-

If "Other", Specify

Destination * -Select-

If "Other", Specify

Notes

Save & Continue Cancel

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