

# HMIS Workflow: Shelters Module

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## Using Shelters Module to Enroll Client

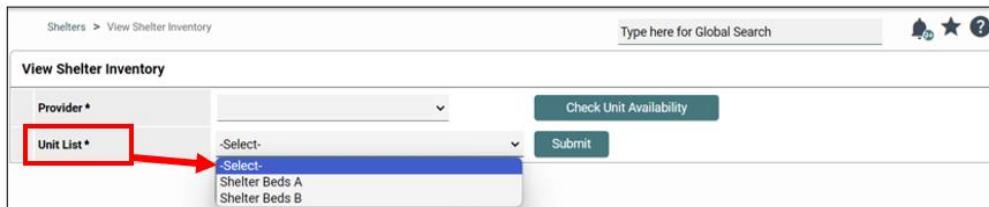
### A. Home Dashboard

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

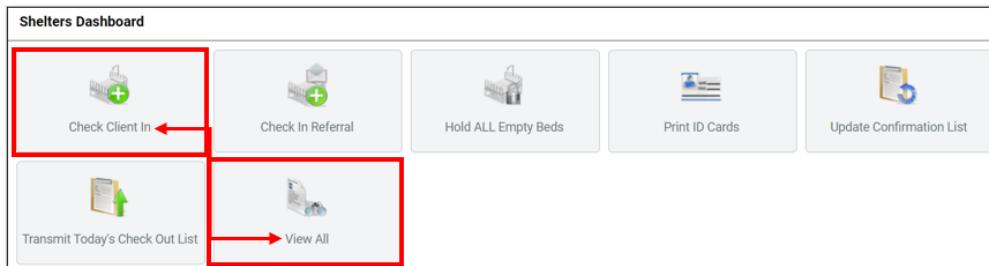


### B. Select the Bed/Unit to Enroll Client

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

A screenshot of the 'View Shelter Inventory' page. The 'Unit List\*' dropdown menu is open, showing 'Select-' and 'Shelter Beds A' and 'Shelter Beds B' as options. A red arrow points from the 'Unit List\*' label to the dropdown menu.

2. To view available inventory, click either 'Check Client In' or 'View All'

A screenshot of the 'Shelters Dashboard' page. It features several buttons: 'Check Client In' (highlighted with a red box and an arrow), 'Check In Referral', 'Hold ALL Empty Beds', 'Print ID Cards', 'Update Confirmation List', 'Transmit Today's Check Out List' (highlighted with a red box and an arrow), and 'View All' (highlighted with a red box and an arrow).

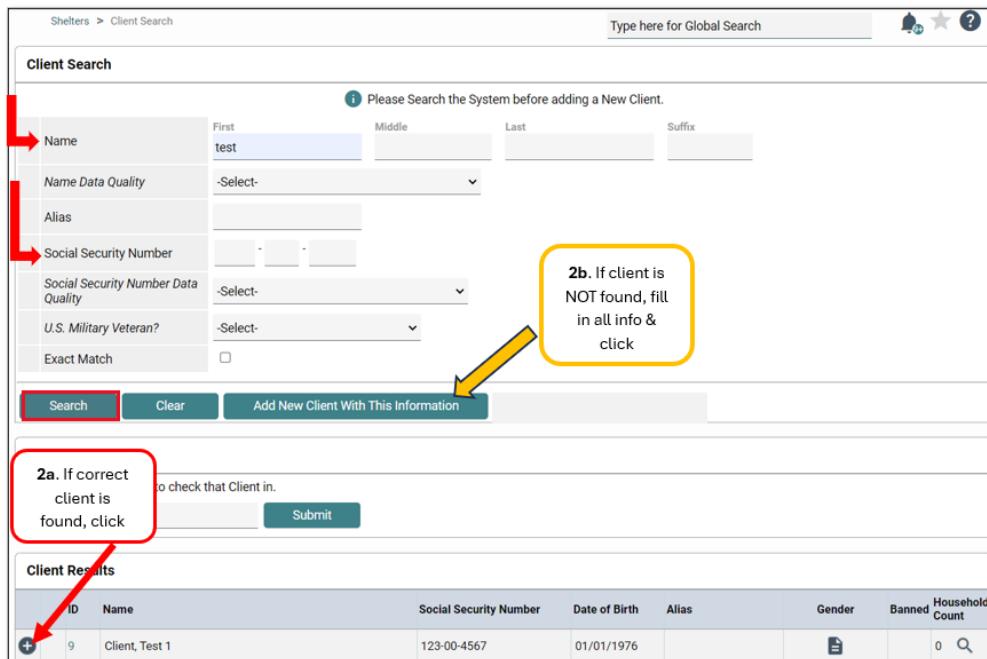
3. Identify an empty bed to assign client to & click the **+** on the left to enroll

Shelter Inventory Information										
Unit List - Shelter Beds B										
Display <a href="#">All Beds</a> <span style="float: right;">Sort By <a href="#">Floor</a> <span style="float: right;">Ascending</span></span> <span style="float: right;">Sort</span>										
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**



**Client Search**

Please Search the System before adding a New Client.

Name	First test	Middle	Last	Suffix
Name Data Quality	-Select-			
Alias				
Social Security Number				
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	<input type="checkbox"/>			
<input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Add New Client With This Information"/>				

**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	0

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

4. Enrolling a **single individual**:

- Complete the Entry assessment
- Click **Save & 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

- Expand the 'Households Overview' section

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

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

- If no household appears, click **Start New Household**

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

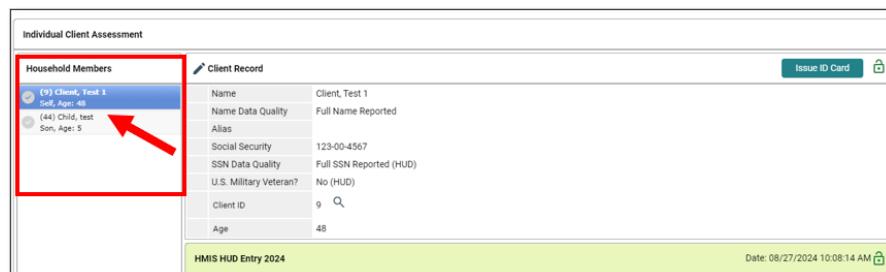
- If a match is found, confirm the details match the household member's name, date of birth, and social security number. If it is the same person, click on the **plus**  to the left of that client's name
- If no matches are found, try at least two other ways to search for the client (partial name, alias 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')



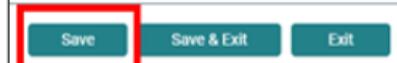
Household Information - (13) Male Single Parent						
(13) Male Single Parent		<input type="button" value="Save"/> <input type="button" value="Save &amp; Exit"/> <input type="button" value="Exit"/>				
Household Type *	Male Single Parent	Income	US\$100.00	Client Count	2	
Household Members						
Name	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	<input type="button" value="Edit"/>	1 <input type="button" value="View"/>
(44) Child, test	5	No	Son	08 / 27 / 2024	<input type="button" value="Edit"/>	1 <input type="button" value="View"/>

- 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	Client Record
<input checked="" type="radio"/> (9) Client, Test 1 Self, Age: 48	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 <input type="button" value="Edit"/> Age: 48
HMIS HUD Entry 2024 <span style="float: right;">Issue ID Card </span> <span style="float: right;">Date: 08/27/2024 10:08:14 AM </span>	

- 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

- Under '*Household Members*', click **Assign Unit**

The screenshot shows a list of household members. The first member, '(13) Male Single Parent', has a checked checkbox. The second member, '(44) Child, test', has an unchecked checkbox. To the right of the list is a button labeled 'Assign Unit' with a red box and an arrow pointing to it.

- From the drop down, choose a bed

The screenshot shows a 'Unit List' dialog box for 'Shelter Beds B'. A dropdown menu is open, showing 'Bed' and '-Select-'. The '-Select-' option is highlighted with a red box and an arrow pointing to the 'Select' button.

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

The screenshot shows a group of buttons: 'Save', 'Save & Exit' (highlighted with a red box and an arrow), and 'Exit'.

The screenshot shows a 'Shelter Inventory Information' table with the following data:

Shelter Inventory Information									
Unit List - Shelter Beds B									
Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.
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)	22	No
	Men's Shelter Beds	1	Bed 004	Hold	EMPTY				
	Men's Shelter Beds	1	Bed 005	Hold	EMPTY				

## E. Review Enrollment Information

- You will now be taken back to the '*Unit List*'
- 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 #**

The screenshot shows a 'Shelter Inventory Information' table with the following data:

Shelter Inventory Information									
Unit List - Shelter Beds B									
Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID	Conf.
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)	22	No
	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
CAN: Shelter Eastside (family) (5)	HUD	08/18/2023		

3. Click **Add Interim Review**



Review Date	Review Type	Client Count
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

Save & Continue 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

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								
Date In	Floor	Room	Bed	Hold	Client	Date of Birth	Gender	Group ID
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			

3. Complete Exit Information

- If there is more than one client exiting, check the box next to each additional household member that is exiting the project
- Confirm the **Date Out**
- Select **Reason for Leaving**
- Select **Destination**
- 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