HMIS Workflow:
Entry – Interim – Exit

Contents

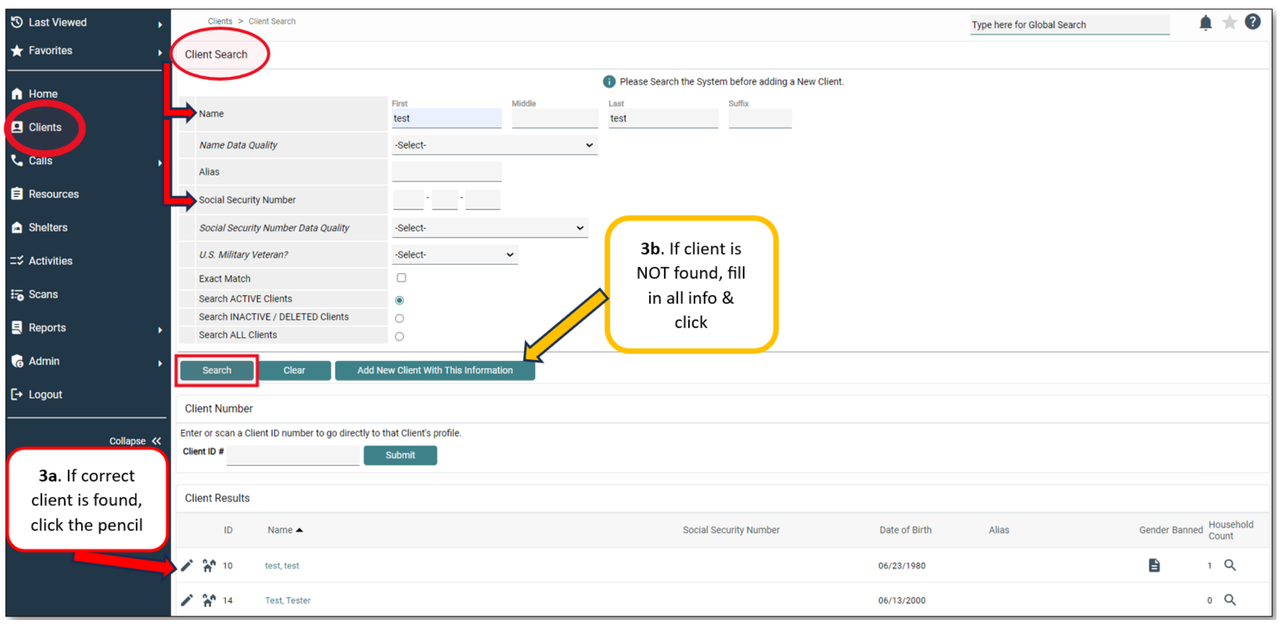
Client Entry

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

B. Client Search

1. Click on **Clients**
2. Enter Head of Household's Name &/or partial SSN
3. 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, click on the **pencil** 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**



C. Households

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

1. Click on **Households** tab
2. If no household appears, click **Start New Household**
    a. Select appropriate **Household Type**
    b. Search for additional household member(s)
        - Enter another 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**

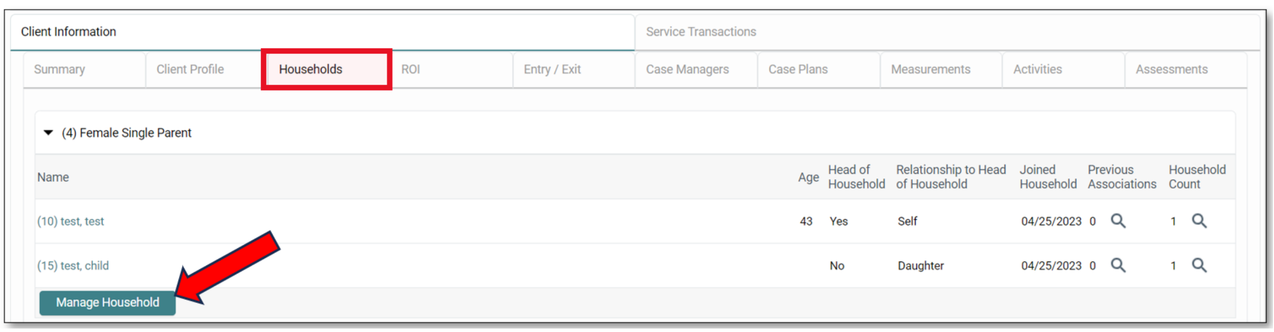
c. Repeat the search until all household members are listed in the "Selected Clients" section

d. Click **Continue**

e. Select **Head of Household** and **Relationship to Head of Household** for each Household member from the table at the top

f. Click Save & Exit

3. If a household is showing on this tab, verify/update household details by clicking **Manage Household**



a. Verify **Household Type**

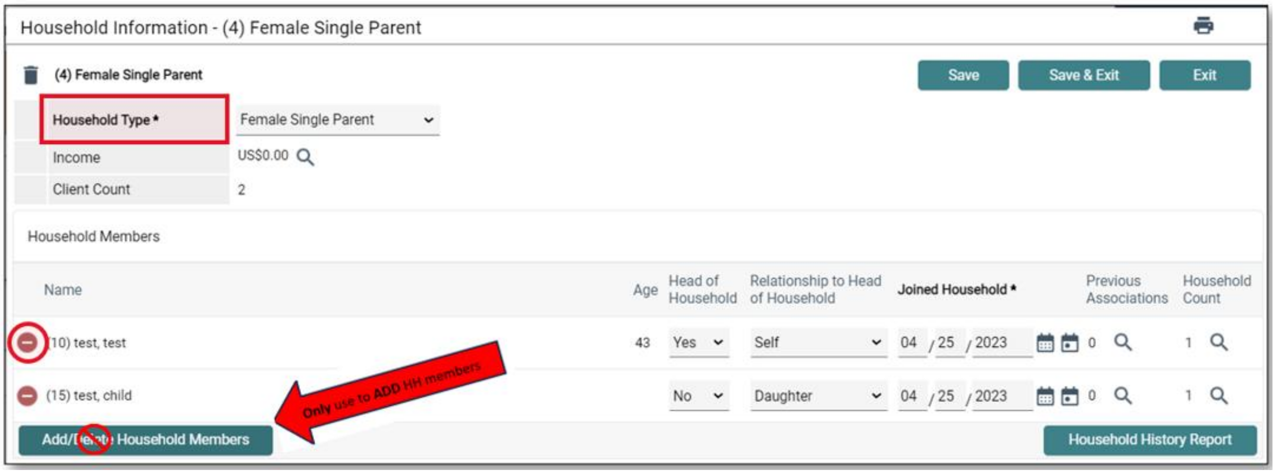
➢ **NOTE!** Do this for **every** HH member

b. Remove household member(s) by clicking the red circle next to their name

➢ **NOTE!** ***<u>Do NOT</u>*** remove clients by clicking **Add/Delete Household Members**

c. Add household member(s) by clicking **Add/Delete Household Members**

- Click the arrow to expand **Add Clients to the Household** section
- Search for additional household member(s)
  - Enter another household member's Name
    - Click **Search** (**NOTE!** Same steps as done above in Step B)
      - 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**



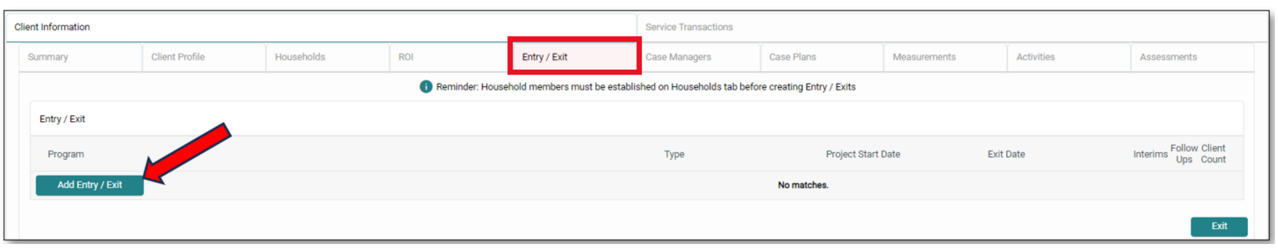
- Repeat until all household members are listed in the "Select Clients" section
- Click **Continue**

d. Select **Head of Household** and **Relationship to Head of Household** for each Household member from the table at the top.

e. Click **Save & Exit** once complete

D. Entry/Exit

1. Click **Entry/Exit** tab
2. Click **Add Entry/Exit**



3. Confirm Project Start Data

a. If there is more than one client entering, check the box next to each additional household member that is entering the project.

- *Anyone not checked will be excluded from the project*

b. Confirm the Provider listed is correct

- The *default provider appearing will be whatever was selected under Enter Data As when first logging into HMIS. If the provider is not correct, click Cancel. Set the Enter Data As and re-search for the head of household*

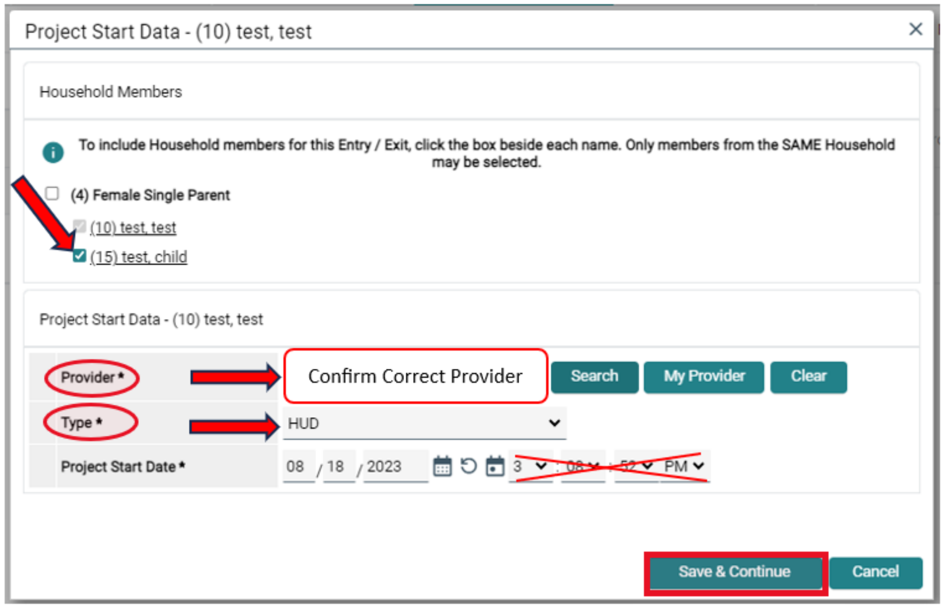
c. Type:

- PATH Projects: Select 'PATH' for the Type
- RHY Projects: Select 'RHY' for the Type
- Veteran Projects: Select 'VA' for the Type
- ALL Other Projects: Select 'HUD' for the Type

d. Confirm the **Project Start Date**

- Do NOT change the time fields

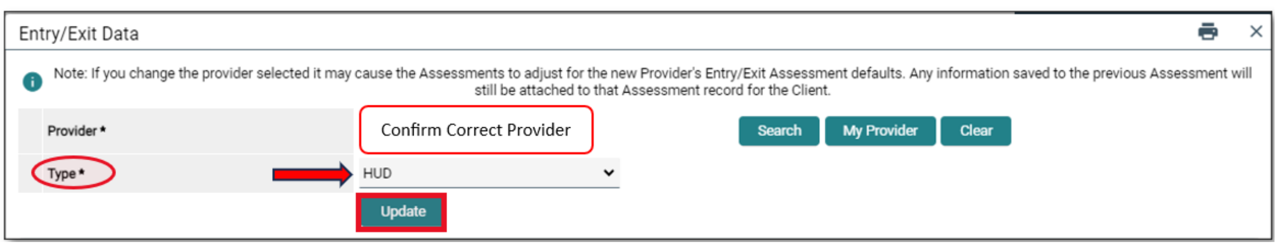
e. Click **Save & Continue**



4. Complete the assessment

a. *If the screen reads "<u>No Entry Assessment had been specified for this Provider</u>", the wrong project type was selected*

- *Scroll to the top of the screen*
- *Select the correct **Type** from the drop menu*
- *Click **Update***



b. Complete/update assessment for the Head of Household

- Click Save at the bottom of the screen

c. If entering for multiple household members, after saving, go to the top of assessment and click 'Add Household Data' to copy common data for household members

d. Complete assessment for any additional household members:

- Scroll to the top of the assessment

- Click on the name of the next additional household member from the “Household Members” menu on the left

- Complete assessment & repeat until all household member data has been entered
- Click Save & Exit

Client Interim (Update/Annual Assessment)

A. Home Dashboard

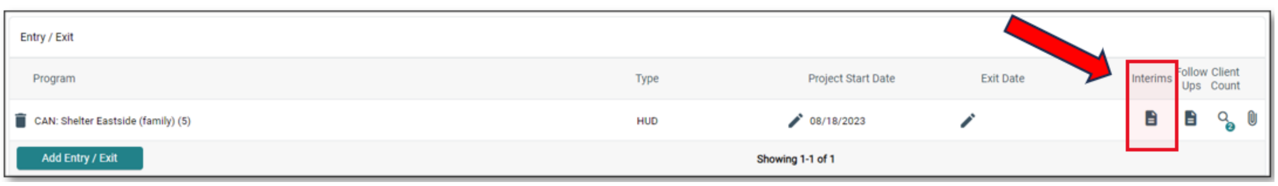
1. Log into HMIS
2. Click **Enter Data As** then click the plus next to the project for which you are entering data

B. Client Search

1. Click on **Client**
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
   a. If there is more than one household member served in the project, check the box next to each additional household member that is participating in the project.
   b. Select the **Interim Review Type**

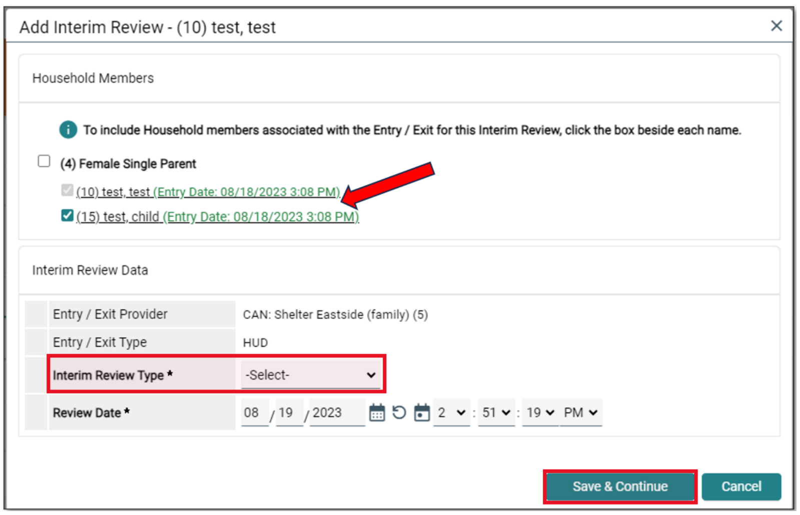
- **Update**: Completed anytime information has changed since project entry
- **Annual Assessment**: ***Required every 12-months*** for clients that are still enrolled in the project
  - Annual Assessments must be completed within ***30-days*** **before OR after** the anniversary of the HoH ***project START DATE***.

    <u>Example</u>

    - If the HoH project START DATE is 3/17/22
      ** And they are ***<u>still enrolled</u>*** in the project on 3/17/23 **
      - The Annual Assessment would need to be ***completed between*** 2/17/23 – 4/17/23

c. Confirm the **Review Date**

d. Click **Save & Continue**



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

<u>Client Exit</u>

A. Home Dashboard

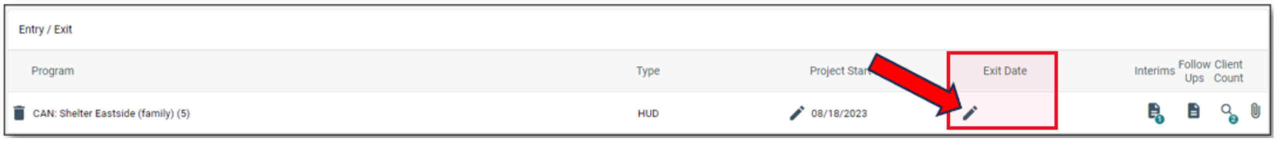
1. Log into HMIS
2. Click **Enter Data As** then click the plus next to the project for which you are entering data

B. Client Search

1. Click on **Client**
2. Search for the client that is exiting the project (name search or HMIS ID search)
3. If needed - Set **Back Date Mode** for the date that the client is exiting the project

C. Entry/Exit

1. Click **Entry/Exit** tab
2. Click the pencil next to the Exit Date column within your project's row



3. Complete Exit Data
    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 **Exit Date**
    c. Select **Reason for Leaving**
    d. Select **Destination**
    e. Click **Save & Continue**
4. Complete exit assessment information
5. Click **Save & Exit** once all assessments for all household members have been completed