

# HMIS Data Entry Workflow: Street Outreach (non-PATH)

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# Street Outreach 101

📌 **PATH St. Outreach projects should refer to the PATH specific workflow on the MD BoS HMIS website - [CLICK HERE](#) to view.**

Street Outreach workers may encounter challenges related to HMIS data collection due to factors such as the infrequency of contacts or the length of time it takes to collect accurate information from a client, among others. The data collection process is designed to support St. Outreach projects as they connect to individuals and families that are experiencing homelessness, and as relationships are built between the street outreach worker and the client. Key terms specific to St. Outreach are defined below.

## **Terms:**

**Date of Engagement (DoE):** The point at which an interactive client relationship results in a deliberate client assessment or beginning of a case plan.

- ***NOTE!*** Data quality is gauged **after** a DoE is entered into a client record & all assessment fields must be completed once the client becomes engaged
- Must be **on or after** the project Start Date
  - If the DoE is determined after the project start date, enter the DoE by completing an Interim: Update Assessment
- **Only one** DoE can be recorded per project enrollment
- If client **does not** become Engaged, DoE is not recorded

**Current Living Situation (CLS)** (also referred to as 'Contacts'): A CLS must be recorded every time a St. Outreach worker meets, or attempts to meet, with a client enrolled into the St. Outreach project.

- The 1<sup>st</sup> CLS is recorded in the project Entry Assessment
- CLS entered prior to the project Exit Date are recorded by completing an Interim: Update Assessment
  - The interaction may range from a brief conversation between the street outreach worker and the client about the client's well-being or needs, to a more in-depth conversation resulting in a referral to service
  - May occur in a street outreach setting or a service setting such as an emergency shelter or drop-in center
- The final CLS is recorded in the project Exit Assessment

## **Data Entry Workflow**

### **Project Entry - Initial Meeting with Client:**

This is the initial Point of Contact with the client. In essence, it involves capturing the information about the client's demographics and the number of contacts the outreach worker had with the client before Engagement.

**Note: The outreach worker is required to enter all persons contacted into HMIS**

In the past, many projects waited until a client was formally enrolled into the St. Outreach project before entering the information into HMIS. With the new reporting structure, all clients who have been contacted for potential enrollment into St. Outreach must have their data entered into HMIS. In some instances, a person contacted may not even be willing to provide a name. This person will still need to be entered into HMIS.

Projects are highly encouraged to collect as much information as possible, but in certain circumstances, it may be necessary to put very rudimentary information into HMIS. In these situations, it is critical that you remember the system client ID that was automatically generated and assigned to the client file. With a lack of client demographics and identifying information, it will be more likely that duplicate client files will be created, which can cause report issues.

## 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

## Client Search

4. Click on **Clients**
5. Enter Head of Household's Name &/or partial SSN
6. 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**

The screenshot shows the 'Client Search' form in the HMIS system. The left sidebar has 'Clients' circled in red. The form fields include Name (First, Middle, Last, Suffix), Name Data Quality, Alias, Social Security Number, Social Security Number Data Quality, and U.S. Military Veteran? (checkbox). Search options include Exact Match, Search ACTIVE Clients, Search INACTIVE / DELETED Clients, and Search ALL Clients. The 'Search' button is circled in red. A yellow box highlights the 'Add New Client With This Information' button with the text: '3b. If client is NOT found, fill in all info & click'. A red box highlights the 'Search' button with the text: '3a. If correct client is found, click the pencil'. Below the form is a 'Client Number' section with a 'Client ID #' field and a 'Submit' button. The 'Client Results' table shows two entries:

ID	Name	Social Security Number	Date of Birth	Alias	Gender Banned	Household Count
10	test, test		06/23/1980			1
14	Test, Tester		06/13/2000			0

## Households

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

Clients that present with add'l HH members, [Click Here](#) to refer to the *Managing Households in HMIS* guide for step-by-step instructions on searching, creating, and managing households in HMIS.

## Entry Assessment

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

The screenshot shows the HMIS interface for the 'Entry / Exit' tab. The top navigation bar includes 'Client Information' and 'Service Transactions'. Under 'Client Information', tabs for 'Summary', 'Client Profile', 'Households', 'ROI', 'Entry / Exit', 'Case Managers', 'Case Plans', 'Measurements', 'Activities', and 'Assessments' are visible. The 'Entry / Exit' tab is active and highlighted with a red box. A red arrow points to the 'Add Entry / Exit' button in the bottom left corner of the form area. The form contains a table with columns: Program, Type, Project Start Date, Exit Date, Interims, and Follow Ups Count. The table currently shows 'No matches.' and an 'Exit' button is located in the bottom right corner.

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
    - By default, the provider shown will be what 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. Select the appropriate **Type**
  - d. Confirm the **Project Start Date**
    - Do NOT change the time fields
  - e. Click **Save & Continue**
4. Complete the *Entry Assessment*
  - a. If the screen reads *"No Entry Assessment had been specified for this Provider"*, the wrong project type was selected
    - Scroll to the top of the screen
    - Select the correct **Type** from the drop menu & update

### NOTE!!

- Complete the *Entry Assessment* as thoroughly as possible, with information client is willing to provide
- St. Outreach clients may not provide you with all the information at initial contact & you may need to edit the *Entry Assessment* to add information learned from the client as you build rapport.
- Remember to complete:
  - Current Living Situation sub-assessment
    - **The first CLS must be:**
      - Entered at the time of **project entry**; and
      - Dated for the same date as the project entry
  - Date of Engagement (DoE) – should a client **not** meet criteria to be considered 'Engaged' leave the DoE blank
    - If there a DoE from a previous project enrollment – **clear out the old date!**

**Current Living Situation**  
St. Outreach & SSD for St. Outreach Projects ONLY  
**\*\*Answer for HoH and All Adults**  
Every CLS entry MUST be End Dated w/ the Same Date it is Entered  
Add a CLS entry EVERYTIME contact is made / attempted with client  
1st CLS = Project ENTRY Date & Last CLS = Project EXIT Date

Search: Current Living Situation

Start Date *	End Date	Information Date	Current Living Situation
Add			

Have I Entered a CLS for Today's Date? -Select- v

**Date of Engagement**  
St. Outreach & SSD for St. Outreach Projects ONLY  
**\*\*Answer for HoH and All Adults**  
CANNOT be Prior to Project Start Date (If Needed Clear Out Previous DoE)  
Add When Client ACTIVELY Engaged in Project  
\*Data Quality Measured From This Date Forward\*

Date of Engagement / /

5. Click **Save**
  - If applicable, repeat above steps to complete for add'l HH members
6. Click **Save & Exit**

### Updating Client Information not collected at initial contact

If you need to edit / add information in the Entry Assessment (information that was true at project entry, but was not collected at initial contact), simply return to the Entry / Exit tab and click on the pencil icon next to the Entry Date.

Project Start Date

10/15/2024

## Interim Reviews

### Recording a Current Living Situation (CLS)

A Current Living Situation (CLS) **must be recorded** in HMIS **EVERY time** a St. Outreach worker meets (or attempts to meet) with an individual is enrolled in the St. Outreach project – including when a Date of Engagement (DoE) is recorded. These are recorded by completing the Current Living Situation (CLS) sub-assessment.

- Any CLS recorded *prior* to the Exit Date must be completed within an Interim Assessment
- The interaction may range from a brief conversation between the street outreach worker and the client about the client's well-being or needs, to a more in-depth conversation resulting in a referral to service
- The interaction may occur in a street outreach setting or a service setting such as an emergency shelter or drop-in center

### Recording the 'Date of Engagement' (DoE)

DoE is the point at which an interactive client relationship results in a deliberate client assessment or beginning of a case plan. If the DoE is **determined after** the project start date, it must be completed within an Interim: Update Assessment.

#### NOTE!!

- The Date of Engagement (DoE) MUST be **on** or **after** the project Start Date
- Data quality is gauged **after** a DoE is entered into a client record & all assessment fields must be completed once the client becomes engaged

- **Only one** DoE can be recorded per project enrollment
- If client **does not** become engaged, DoE is not recorded

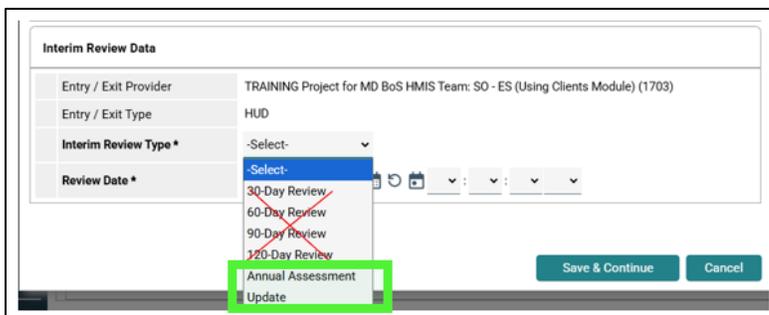
**1. Create an Interim Review**

[Click Here](#) to view the *HMIS Workflow: Sub-Assessments* for more information on completing Interim Review assessments.

- a. Click the **Entry / Exit tab**
- b. Click the **Interim** icon listed within your project’s row
- c. Click Add Interim Review



- d. Select the **Interim Review Type**
  - **Update:** completed anytime information has changed since project entry
  - **Annual:** required assessment for all clients remaining in a project after one year; Annual Assessments must be completed within 30 days before or 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)
  - MD BoS CoC *does not* use (nor report on) *any of the other* Interim Type options
- e. Click **Save & Continue**



- f. Update the assessment information - [Click Here](#) to view the *HMIS Workflow: Sub-Assessments* for more information on completing Interim Review assessments
- g. Click **Save & Exit**

## Client Exit from the St. Outreach Project

St. Outreach project exits can be a '*Formal*' project exit or a '*No Contact*' project exit. Per the MD BoS HMIS 'No Contact' policy, after **90-days of no contact** a client is to be **exited** from the St. Outreach project.

### 1. Create the Exit Record

- a. Click on the Entry / Exit tab
- b. Click the pencil next to the Exit Date column within your project's row
- c. Select a *Reason for Leaving* and *Destination*
- d. Click **Save & Continue**
- e. Make sure to:
  - Complete a *Current Living Situation*

**Current Living Situation**  
St. Outreach & SSO for St. Outreach Projects ONLY  
\*\*Answer for Holt and All Adults  
Every CLS entry MUST be End Dated w/ the Same Date it is Entered  
Add a CLS entry EVERYTIME contact is made / attempted with client  
1st CLS = Project ENTRY Date & Last CLS = Project EXIT Date

Search: Current Living Situation

Start Date *	End Date	Information Date	Current Living Situation
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Add

Have I Entered a CLS for Today's Date? -Select-

- f. Click **Save & Exit**

## Helpful Tips and Reminders

- As you meet with the client and gather additional client demographic information, include those data elements in the Entry Assessment
- Create Interim: Update Assessments to document the Date of Engagement (if not entered at enrollment in the Entry Assessment), Current Living Situation recorded for every contact, and changes to HUD Verification questions (changes in health insurance coverage, disability information, monthly income, and non-cash benefits) that occur after the first contact / project entry
- The difference between updating client information on the Entry Assessment and creating an Interim Review:
  - Even if you don't know all of the client's demographic data (i.e. name, gender, date of birth, etc.) at the time of the first contact, regardless of when you do learn this information, the client demographic information is true for a client at the time of their St. Outreach Entry Date. Therefore, when you get the demographic data from the client, you should enter this information on the Entry Assessment
  - Interim: Update Assessments are created for Contacts and for data that changes after the project enrollment.

**Example:** Client begins receiving SSI after project Start Date. Since this data was not true or accurate at the time of project enrollment, you will need to create the Interim: Update Assessment to document the date that the change in income occurred