

# HMIS Entry – Interim – Exit Workflow

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## 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**

Client Search

Please Search the System before adding a New Client.

Name: First test, Middle, Last test, Suffix

Name Data Quality: -Select-

Alias:

Social Security Number: . . .

Social Security Number Data Quality: -Select-

U.S. Military Veteran?: -Select-

Exact Match:

Search ACTIVE Clients:

Search INACTIVE / DELETED Clients:

Search ALL Clients:

Buttons: Search, Clear, Add New Client With This Information

Client Number: Enter or scan a Client ID number to go directly to that Client's profile.

Client ID #: Submit

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

### 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**

Client Information		Service Transactions							
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Measurements	Activities	Assessments
▼ (4) Female Single Parent									
Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count			
(10) test, test	43	Yes	Self	04/25/2023	0	1	Q		
(15) test, child		No	Daughter	04/25/2023	0	1	Q		
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>Manage Household</span> </div>									

- 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! Do NOT** 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**

Household Information - (4) Female Single Parent

(4) Female Single Parent

Household Type \* Female Single Parent

Income US\$0.00

Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(10) test, test	43	Yes	Self	04 /25 / 2023	0	1
(15) test, child		No	Daughter	04 /25 / 2023	0	1

Add/Exit Household Members

Household History Report

- 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**

Client Information

Summary Client Profile Households ROI **Entry / Exit** Case Managers Case Plans Measurements Activities Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Client Ups	Count
No matches.						

Add Entry / Exit

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. Select HUD as the Type
  - d. Confirm the **Project Start Date**
    - Do NOT change the time fields
  - e. Click **Save & Continue**

Project Start Data - (10) test, test

Household Members

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

(4) Female Single Parent

(10) test, test

(15) test, child

Project Start Data - (10) test, test

Provider\*  Search My Provider Clear

Type\* HUD

Project Start Date\* 08 / 18 / 2023 3:00 PM

Save & Continue Cancel

4. Complete the 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
  - Click **Update**

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider\*  Search My Provider Clear

Type\* HUD

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

Entry Assessment

Household Members

Household Data Sharing

Client: (10) test, test

Add Household Data

- 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

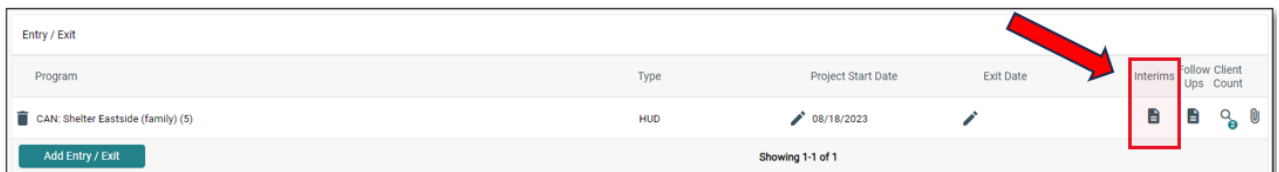
1. Log into HMIS
2. Click **Enter Data As** then click the plus **+** next to the project for which you are entering data

### 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 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)

c. Confirm the **Review Date**

d. 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 Cancel

5. Update assessment information

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

## Client 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

### 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

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

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

The screenshot shows a web form titled "Edit Exit Data - (10) test, test". The form is divided into two main sections: "Household Members" and "Edit Exit Data - (10) test, test".

**Household Members:** This section contains a list of household members. A red arrow points to the checkbox for "(10) test, test", which is currently checked. The other household member, "(15) test, child", is unchecked. A red box highlights the "Save & Continue" button at the bottom right of the form.

**Edit Exit Data - (10) test, test:** This section contains several fields for exit assessment information. A red box highlights the "Exit Date \*" field, which is set to 08 / 19 / 2023. Another red box highlights the "Reason for Leaving" dropdown menu, which is currently set to "-Select-". A third red box highlights the "Destination \*" dropdown menu, which is also set to "-Select-". The "Notes" field is a text area at the bottom of the form.

At the bottom right of the form, there are two buttons: "Save & Continue" (highlighted with a red box and a red arrow) and "Cancel".