

HMIS Coordinated Entry Workflow

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
Southern MD's Coordinated Entry Project is called: **SM_Coordinated Entry: SSO(1630)**
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 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:

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

Client Results


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	🔍	🔍	
(15) test, child		No	Daughter	04/25/2023	0	1	🔍	🔍	
<div style="display: flex; justify-content: space-between; align-items: center;"> Manage Household  </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/(+/-) Household Members

Household History Report

Only use to ADD HH members

- 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

Self-Sufficiency Matrix (SSM)

D. Measurements

Note: Only complete SSM for the head of household.

1. To create an initial measurement, go to the “Measurements” tab and click “Add New Measurement”.
2. The information will default to Initial Point of Measurement.
3. Click Continue.

Measurement

Add New Measurement - (466) Jetson, Jane

Provider * xBoS_CE Test (1452)

Measurement Tool * Self-Sufficiency Matrix

Point of Measurement Initial

Date * 04 / 13 / 2023




Information Reported To Community Services User Other

Select User xBoS_CE Test (1452)
Test CE User (1479)

Continue Exit

Measurement

Add New Measurement - (466) Jetson, Jane

Provider	xBoS_CE Test (1452)
Measurement Tool	Self-Sufficiency Matrix
Point of Measurement	Initial
Date *	04 / 13 / 2023   
Information Reported To	<input checked="" type="radio"/> Community Services User <input type="radio"/> Other
Select User	<input type="text" value="xBoS_CE Test (1452)"/> <input type="text" value="Test CE User (1479)"/>

Domains

1 2 3 4 5 N/A


5. Click "Submit and Move to Next" as you complete entering the measurement.

CE - Adult Education - Details

Score

- 1 - Has completed education/training needed to become employable. No literacy problems.
- 2 - Needs additional education/training to improve employment situation and/or to resolved literacy problems to where they are able to function effectively in society.,
- 3 - Has high school diploma/GED.,
- 4 - Enrolled in literacy and/or GED program and/or has sufficient command of English to where language is not a barrier to employment.,
- 5 - Literacy problems and/or no high school diploma/GED are serious barriers to employment.,
-

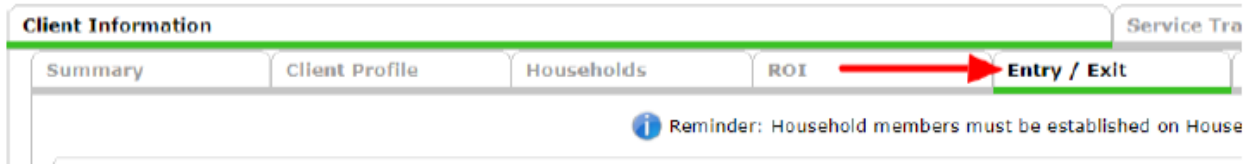
Comments



HUD Entry Data Elements

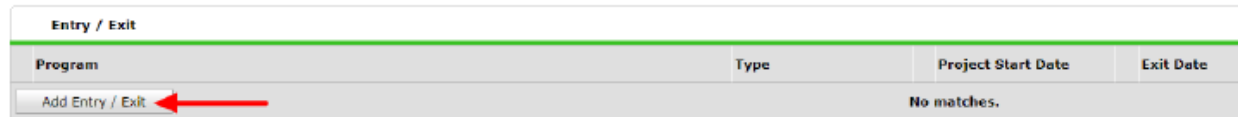
E. Entry/Exit Tab

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



The screenshot shows the 'Client Information' section with several sub-tabs: Summary, Client Profile, Households, ROI, and Entry / Exit. A red arrow points to the 'Entry / Exit' tab. Below the tabs, there is a reminder icon and text: 'Reminder: Household members must be established on House'.

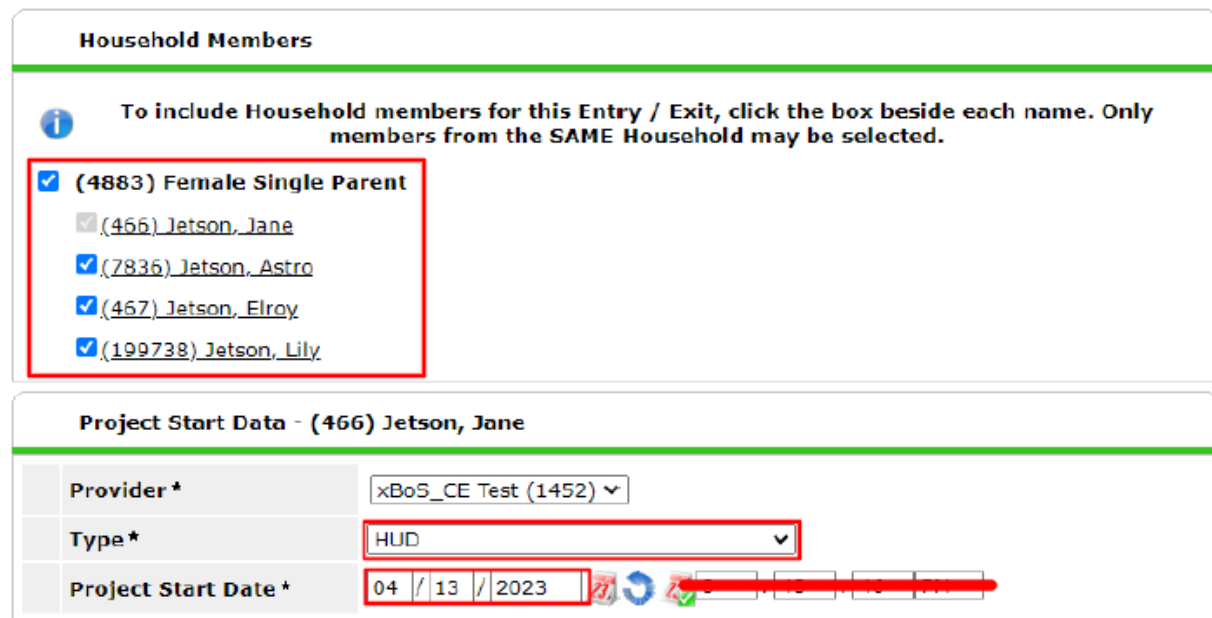
2. Click "Add Entry/Exit."



The screenshot shows the 'Entry / Exit' form with columns for Program, Type, Project Start Date, and Exit Date. The 'Add Entry / Exit' button is highlighted with a red arrow. The text 'No matches.' is visible in the Project Start Date column.

1. If applicable, select all household members entering with Head of Household (the head of household will be selected by default).
 3. The **"Type"** is always **"HUD."**
2. Enter your **"Project Start Date"**. Always disregard time fields.
3. Click **"Save & Continue."**

Project Start Data - (466) Jetson, Jane

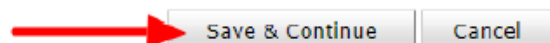


The screenshot shows the 'Household Members' section with a list of members and their selection status. A red box highlights the selection area.

Member	Selected
(4883) Female Single Parent	<input checked="" type="checkbox"/>
(466) Jetson, Jane	<input type="checkbox"/>
(7836) Jetson, Astro	<input checked="" type="checkbox"/>
(467) Jetson, Elroy	<input checked="" type="checkbox"/>
(199738) Jetson, Lily	<input checked="" type="checkbox"/>

The 'Project Start Data - (466) Jetson, Jane' section contains the following fields:

- Provider*: xBoS_CE Test (1452)
- Type*: HUD
- Project Start Date*: 04 / 13 / 2023



The screenshot shows the 'Save & Continue' and 'Cancel' buttons. A red arrow points to the 'Save & Continue' button.

4. Complete/update assessment for the Head of Household, then click **“Save”** at the bottom of the assessment.
 - If entering for multiple family members, scroll to the top of the assessment after saving and click the **“Add Household Data”** button to copy common data to household members.

5. Complete/update and HUD and CE questions. These questions need to be completed per instructions to identify the appropriate next steps and verify housing needs.

Coordinated Entry Assessment

	Date of Assessment *	End Date	Assessment Location	Assessment Type	Assessment Level	Prioritization Status
	08/12/2022		Allegany County	Phone	Crisis Needs Assessment	Placed on Prioritization List

Add Showing 1-1 of 1

Coordinated Entry Event

	Start Date *	Date of Event *	Event *	Referral Result	Date of Result
	08/12/2022	08/12/2022	Referral to post-placement/follow-up case management	Successful referral: client accepted	08/12/2022

Add Showing 1-1 of 1

Entry Assessment

Household Members	Household Data Sharing
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> (466) Jetson, Jane Age: 46 Veteran: No (HUD) <input checked="" type="checkbox"/> (7036) Jetson, Astro Age: 11 Veteran: No (HUD) <input checked="" type="checkbox"/> (467) Jetson, Elroy Age: 20 Veteran: No (HUD) <input checked="" type="checkbox"/> (199738) Jetson, Lily Age: 4 Veteran: No (HUD) 	<p>Client: (466) Jetson, Jane </p> <p style="text-align: right;">Add Household Data</p> <hr/> <p>Coordinated Entry (Test) Entry Date: 04/13/2023 03:43:46 PM </p> <p>Client Phone: <input type="text" value="443-574-4647"/> G</p> <p>Client Email: <input type="text" value="jane@cartoonnetwork.com"/> G</p> <p>Case Manager Name: <input type="text" value="kzhdgkashdgkjdsd"/> G</p> <p>Case Manager Provider: <input type="text" value="Parks and Rec"/> G</p>

Entry Assessment

Household Members	Household Data Sharing
<ul style="list-style-type: none"> <input checked="" type="checkbox"/> (466) Jetson, Jane Age: 46 Veteran: No (HUD) <input checked="" type="checkbox"/> (7836) Jetson, Astro Age: 11 Veteran: No (HUD) <input checked="" type="checkbox"/> (467) Jetson, Elroy Age: 20 Veteran: No (HUD) <input checked="" type="checkbox"/> (199738) Jetson, Lily Age: 4 Veteran: No (HUD) 	<p>Client: (7836) Jetson, Astro </p> <p style="text-align: right;">Add Household Data</p> <hr/> <p>Coordinated Entry (Test) Entry Date: 04/13/2023 03:43:46 PM </p> <p>Client Phone: <input type="text"/> G</p> <p>Client Email: <input type="text"/> G</p> <p>Case Manager Name: <input type="text"/> G</p> <p>Case Manager Provider: <input type="text"/> G</p>

Family Type *	<input type="text" value="Adults & Children"/> G
Total Adults *	<input type="text" value="02"/> G
Total Children *	<input type="text" value="02"/> G
Household Size *	<input type="text" value="04"/> G

Housing Needs & Preferences, Housing Barriers & Critical Documents

1. Complete the Housing Needs & Preferences, Housing Barriers, and Critical Documents information and uploads.

BoS CE Housing Needs & Preferences

	Start Date *	Max Bedrooms Needed	Min Bedrooms Needed	Change in HH expected in next 12 Mos?	ADA Unit Accessibility Needed?	Would being closer/further from geographic area promote stability?	Pet Friendly Unit Needed?	If Yes, what type of pet?	Is your pet a certified service animal?
	05/01/2020	04	04	No	Yes	Yes	Yes		
Add Showing 1-1 of 1									

BoS CE Housing Barriers


	Start Date *	Criminal History Felony	Criminal History Arson	Criminal History Sex Offender	Criminal History Meth Production	Criminal History Other Recent Misdemeanors	Eviction History Type	Eviction Number of Times	Poor credit or lack of rental history?
	03/09/2023	No	No	No	No	No	Evictions		Yes
	02/01/2023	No	No	No	Yes	Yes	Evictions	02	Yes
Add Showing 1-2 of 2									

BoS CE Critical Documents Uploads

	Start Date *	Doc Type *
	07/08/2021	Verification Of Disability
	07/08/2021	Verification of Homeless Episodes Not in HMIS
Add Showing 1-2 of 2		

Interim Updates

1. To add an Interim Review, click the **“Entry/Exit”** tab and click the corresponding paper **“Interims”** icon next to the **“Entry Date”** you already created.
2. Make sure all clients have a check mark next to their name. Select the **“Interim Review Type”** then enter the **“Review Date.”** Update the Interim Review assessment, if applicable.
Note: Always disregard time fields.
3. Select **“Update”** for Interim

Entry / Exit				
Program	Type	Project Start Date	Exit Date	Interims
DSS: Day Resource Center (6172)	HUD	02/01/2018		

Add Entry / Exit Showing 1-1 of 1

Household Members

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

- (31831) Female Single Parent
 - (21319) Jetson, Jane (Entry Date: 02/01/2018 9:36 AM)
 - (99979) Jetson, Elroy (Entry Date: 02/01/2018 9:36 AM)

Interim Review Data

Entry / Exit Provider	DSS: Day Resource Center (6172)
Entry / Exit Type	HUD
Interim Review Type *	<input type="text" value="-Select-"/>
Review Date *	<input type="text" value="7 . 57 . 03 AM"/>

Note: Red arrows in the original image point to the dropdown menu for Interim Review Type and the Review Date field.

Exiting Clients

When the client has found permanent housing or otherwise leaving the CE project, create an exit.

1. Go to the **“Entry/Exit”** tab, and then click next to the blank corresponding **“Exit Date”** on your entry.
Note: Never add an exit date for any other program’s entry.
2. Select other household members, if applicable. Enter **“Exit Date.”** Select **“Reason for Leaving”** and **“Destination”**.
3. Click **“Save & Continue.”**
Note: Always disregard time fields.
4. Update the exit assessment for all applicable household members. Use the **“Add Household Data”** button to copy common data to household members. Click **“Save & Exit.”**

Entry / Exit			
Program	Type	Project Start Date	Exit Date
xBoS_CE Test (1452)	HUD	04/13/2023	

Add Entry / Exit Showing 1-1 of 1

Edit Exit Data - (466) Jetson, Jane

Household Members

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

- (4883) Female Single Parent
 - (466) Jetson, Jane
 - (7836) Jetson, Astro
 - (467) Jetson, Elroy
 - (199738) Jetson, Lily

Edit Exit Data - (466) Jetson, Jane

Exit Date * 05 / 16 / 2023

Reason for Leaving Completed program

If "Other", Specify

Destination * Rental by client, with RRH or equivalent subsidy (HUD)

If "Other", Specify

Notes

Save & Continue Cancel