HMIS Coordinated Entry Workflow

Client Entry

A. Home Dashboard

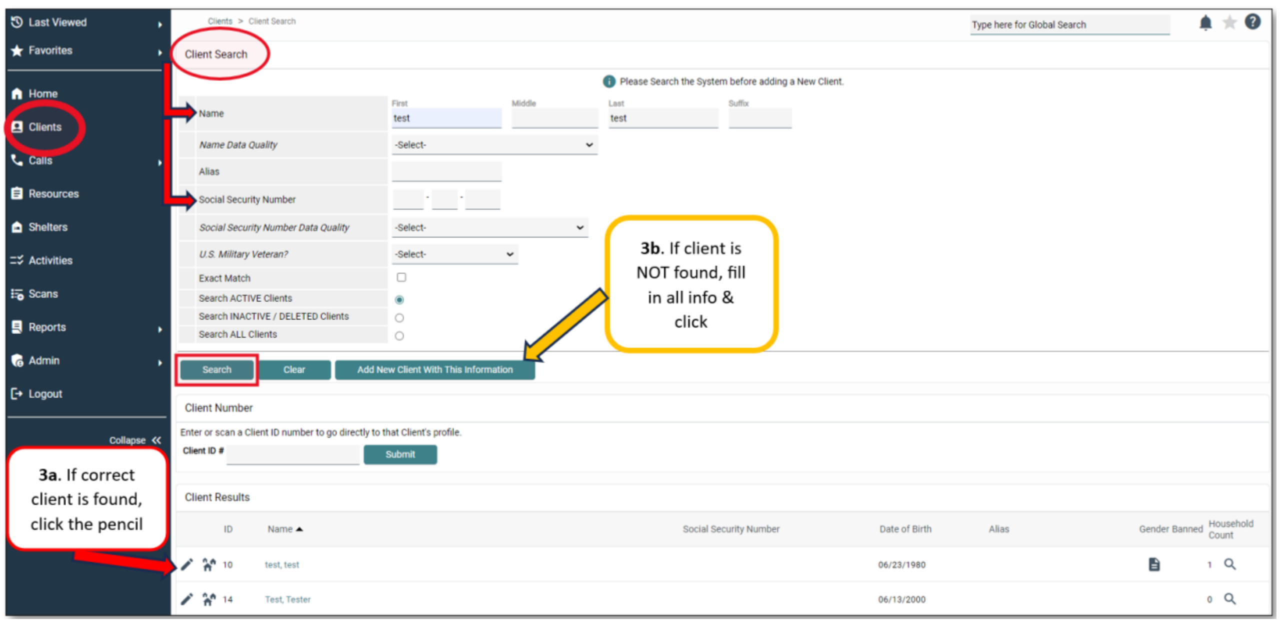
1. Log into HMIS
2. Click **Enter Data As** then click the plus ⊕ next to the project for which you are entering data

   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**



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**

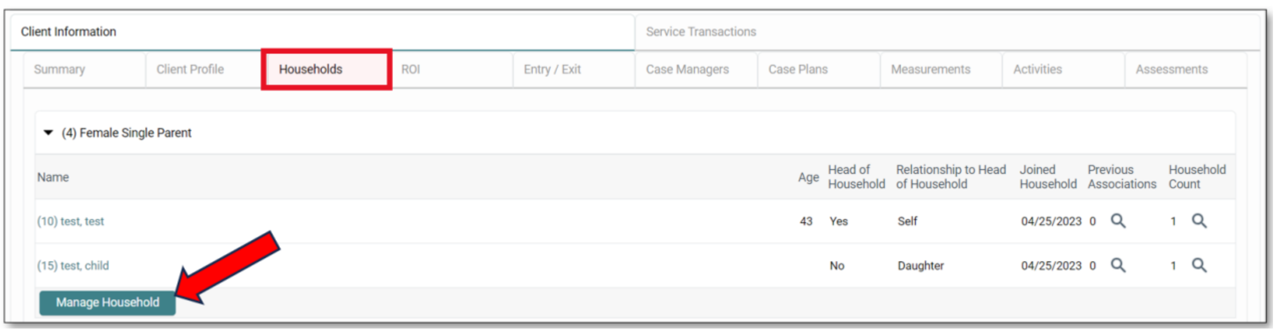
c. Repeat the search until all household members are listed in the "Selected Clients" section

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

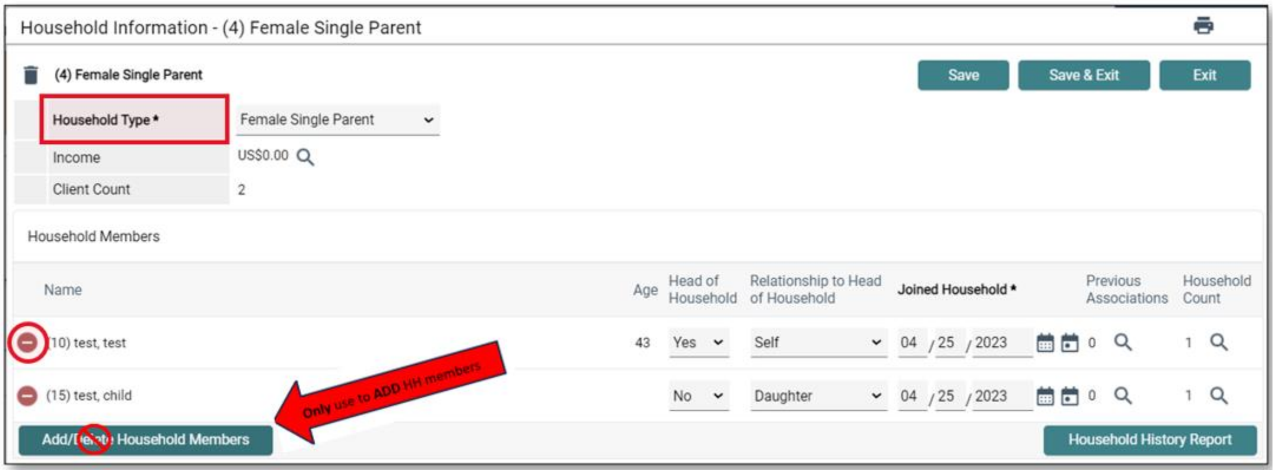
b. Remove household member(s) by clicking the red circle next to their name

> ➢ **NOTE!** ***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**



- 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.

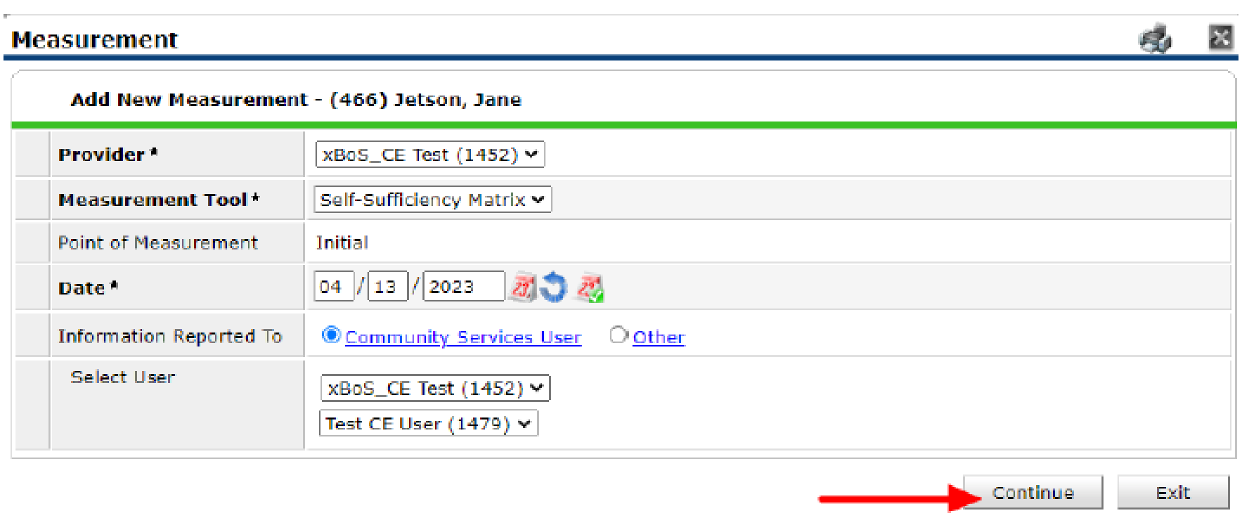
e. Click **Save & Exit** once complete

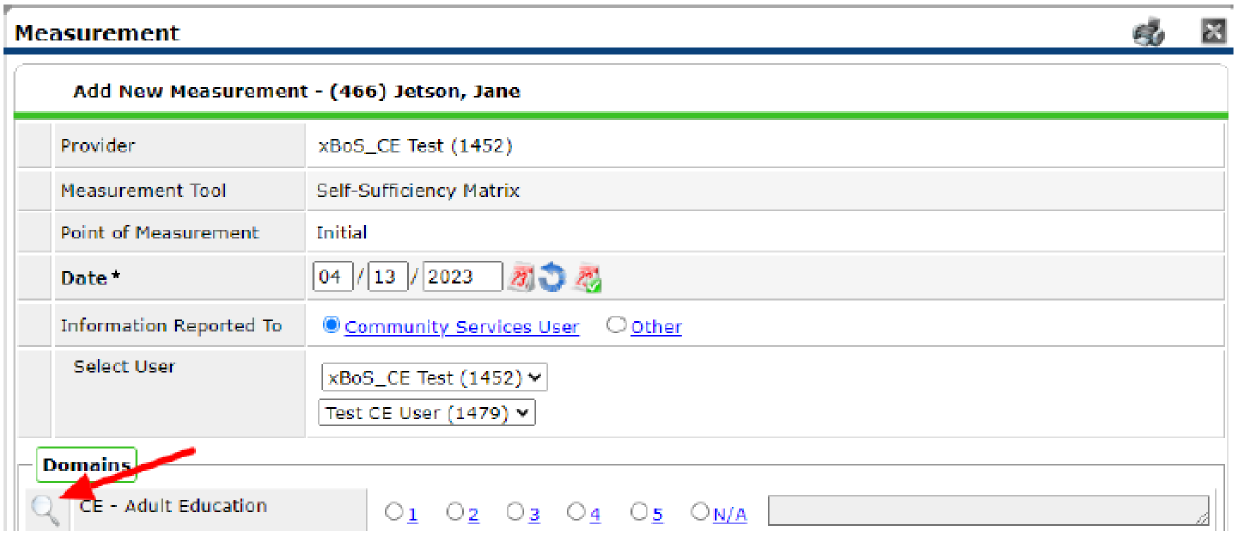
Self-Sufficiency Matrix (SSM)

D. Measurements

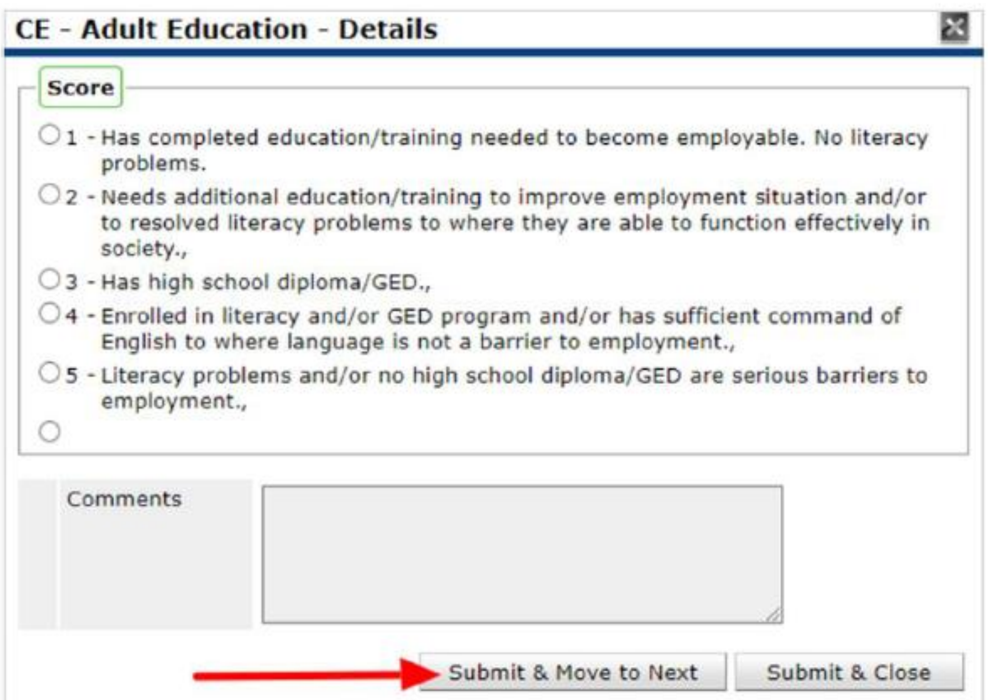
Note: Only complete SSM for the head of household.

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.





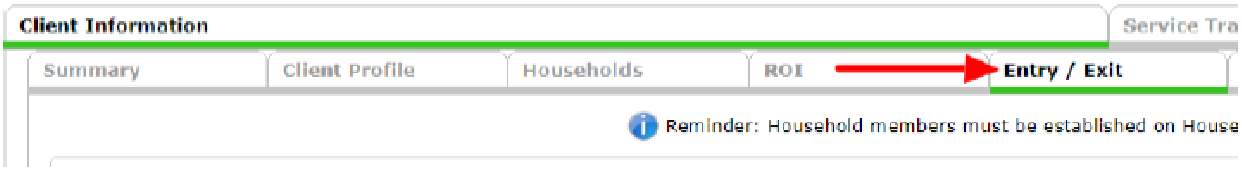
5. Click "Submit and Move to Next" as you complete entering the measurement.



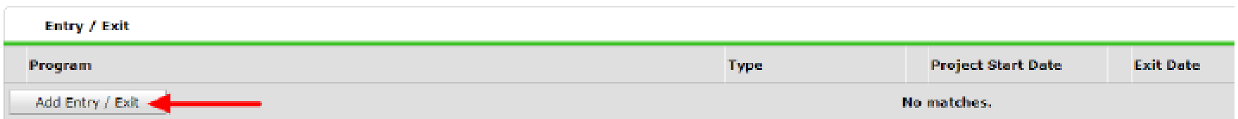
HUD Entry Data Elements

E. Entry/Exit Tab

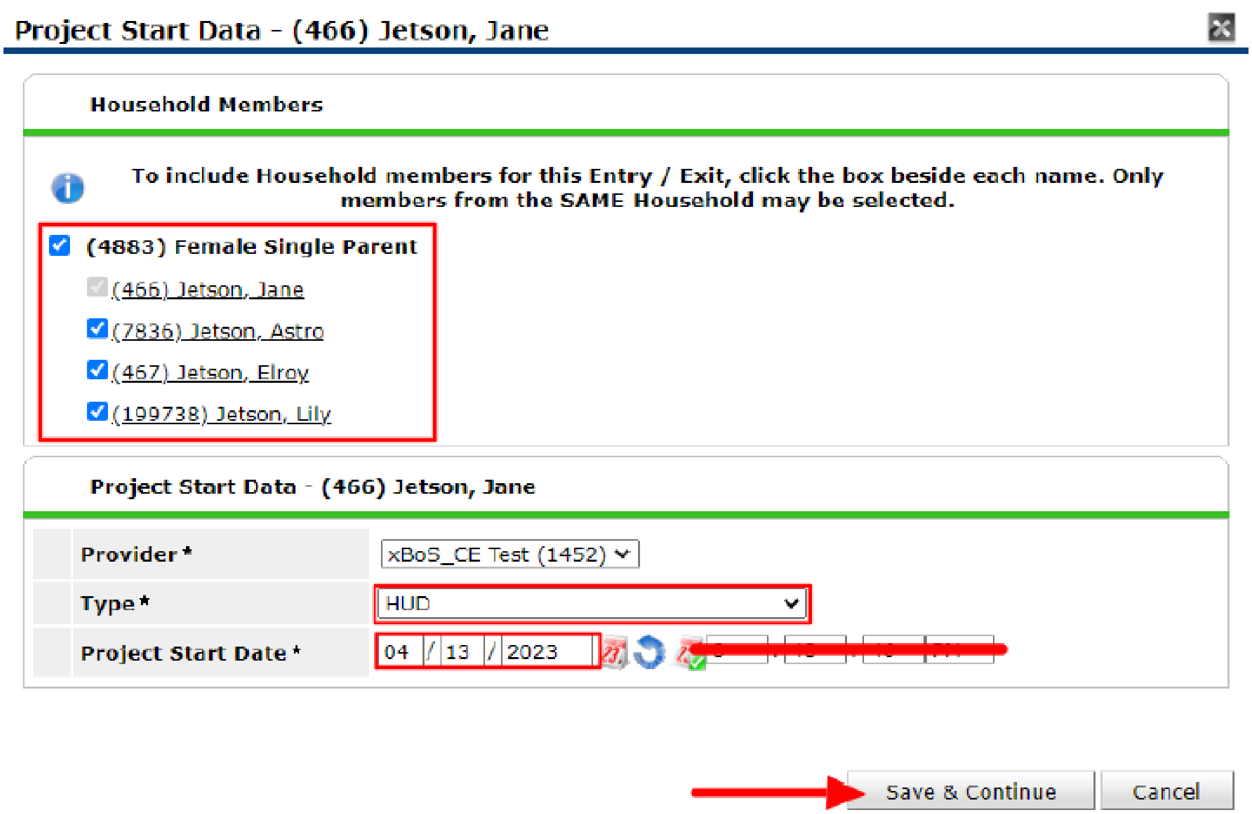
1. Click Entry/Exit tab.
2. Click Add Entry/Exit.



2. Click "***Add Entry/Exit.***"



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***."



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

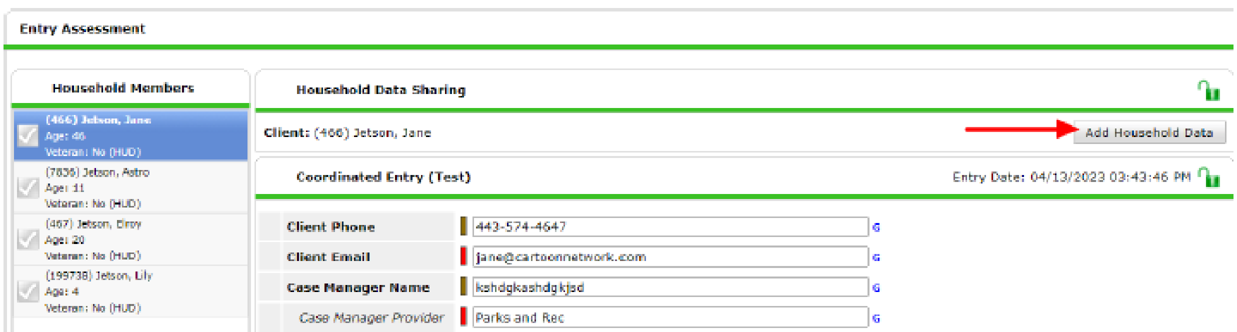
Date of Assessment *	End Date	Assessment Location	Assessment Type	Assessment Level	Prioritization Status
08/12/2022		Allegany County	Phone	Crisis Needs Assessment	Placed on Prioritization List

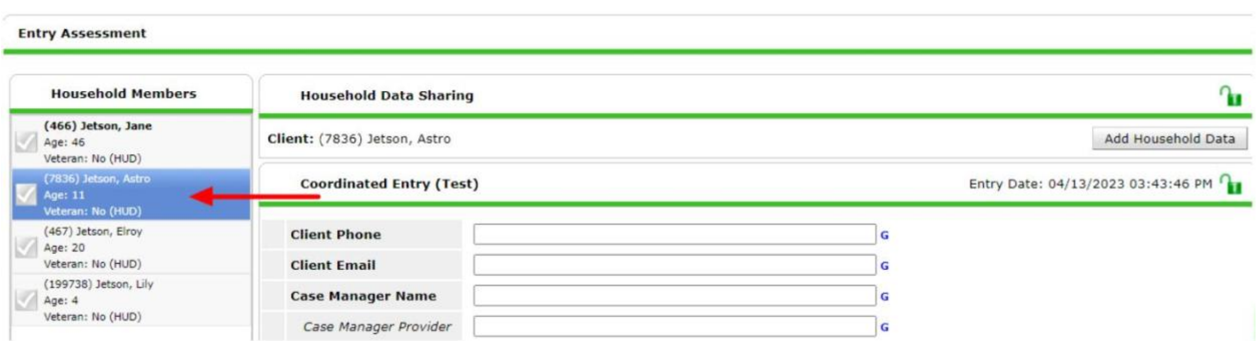
Add — **Showing 1-1 of 1**

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**





Family Type*	Adults & Children
Total Adults*	02
Total Children*	02
Household Size*	04

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

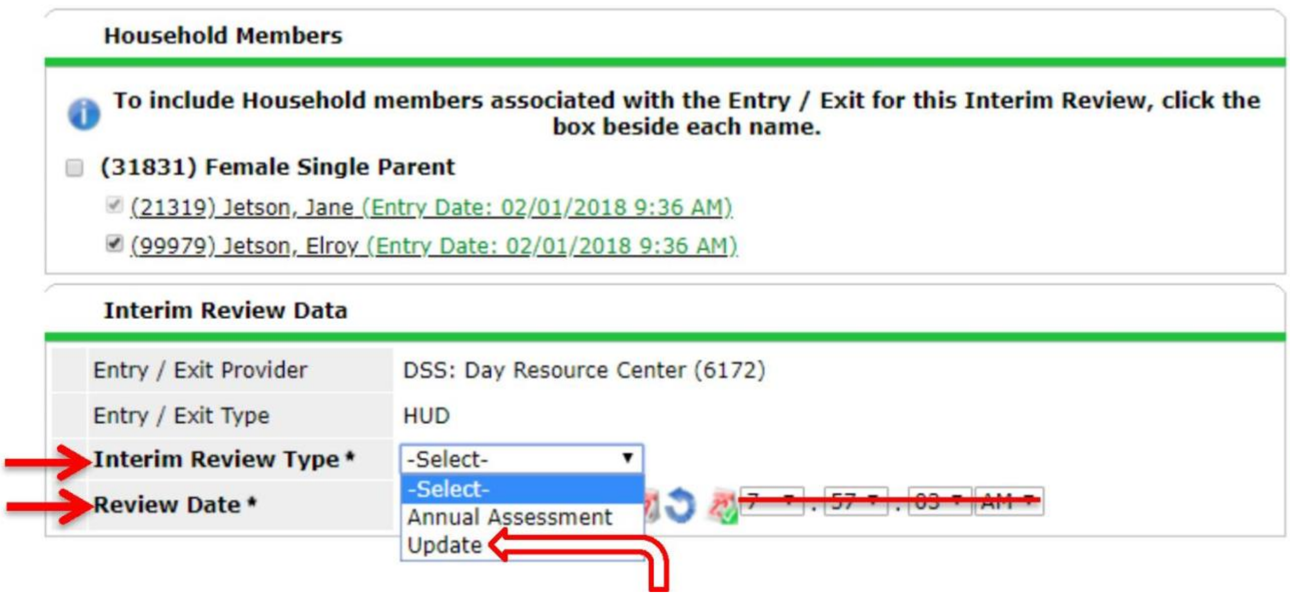
Add — **Showing 1-2 of 2**

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



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: <u>Never</u> 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."***