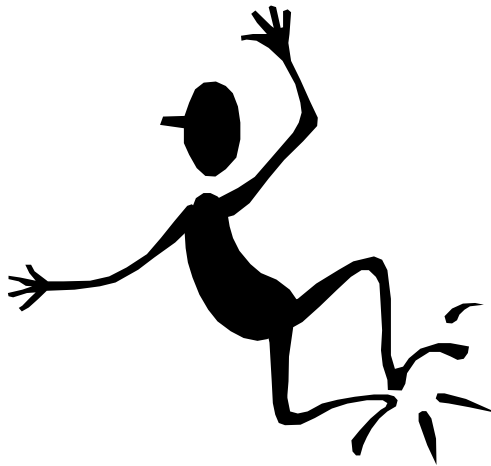
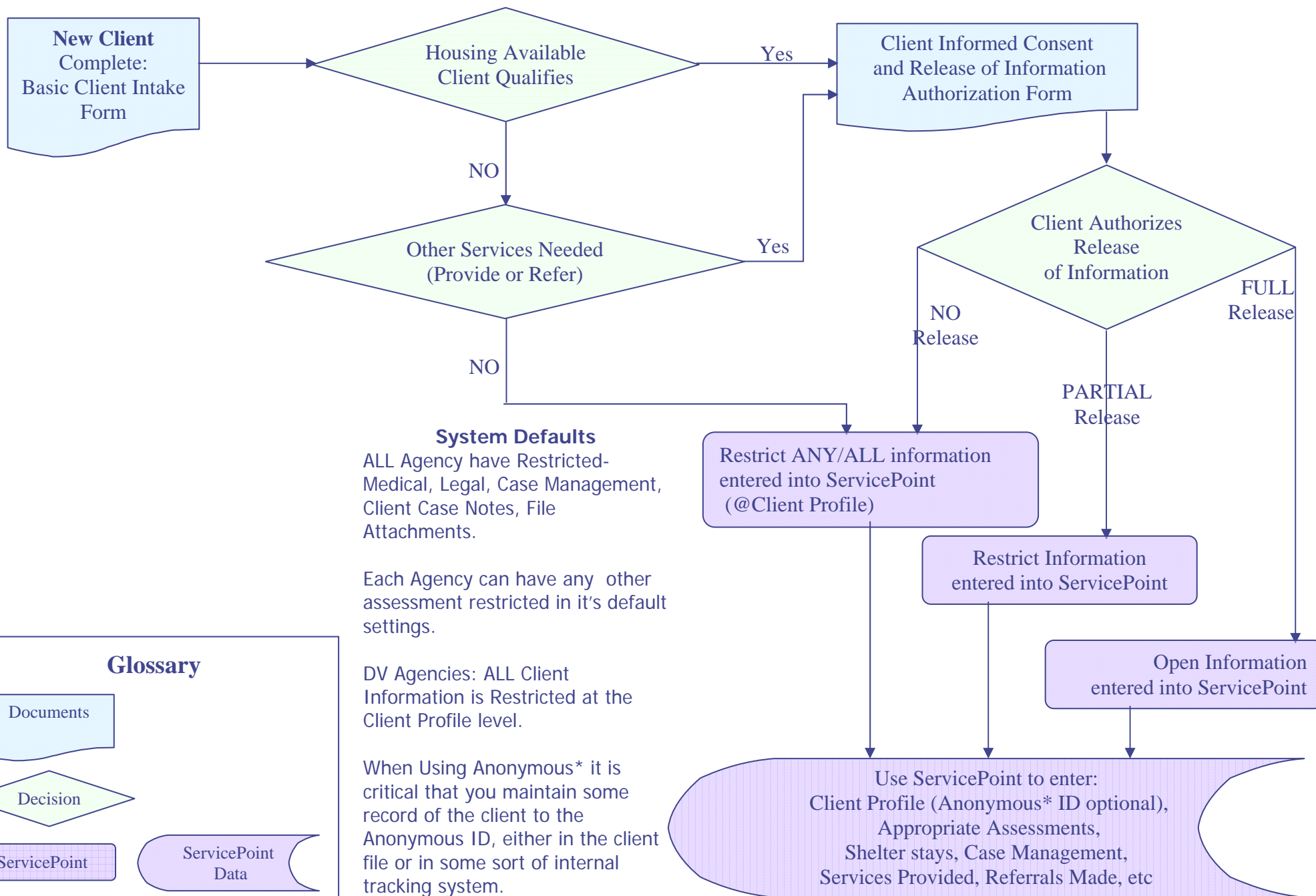




# HMIS Data Entry Work Flow





**System Defaults**

ALL Agency have Restricted-Medical, Legal, Case Management, Client Case Notes, File Attachments.

Each Agency can have any other assessment restricted in it's default settings.

DV Agencies: ALL Client Information is Restricted at the Client Profile level.

When Using Anonymous\* it is critical that you maintain some record of the client to the Anonymous ID, either in the client file or in some sort of internal tracking system.

**Glossary**

Documents

Decision

ServicePoint

ServicePoint Data

Client Returns for Services or Referral

Verify ServicePoint Information is correct (Consent & Release)

Not in SP or Client Requests a Change

Client Informed Consent and Release of Information Authorization Form

If the client has 2 or more profiles – please contact Wendy Smith to review and correct if necessary. It may be that your entry is restricted and the client has been to an other agency. If this is the case Be sure to use the client entry indicated by the \* (your agency entered this client profile),

In SP & Info is Current

Client Authorizes Release of Information

NO Release

FULL Release

PARTIAL Release

System Defaults Returning Clients information and settings remain unless client requests modifications.

Restrict ANY/ALL information entered into ServicePoint (@Client Profile)

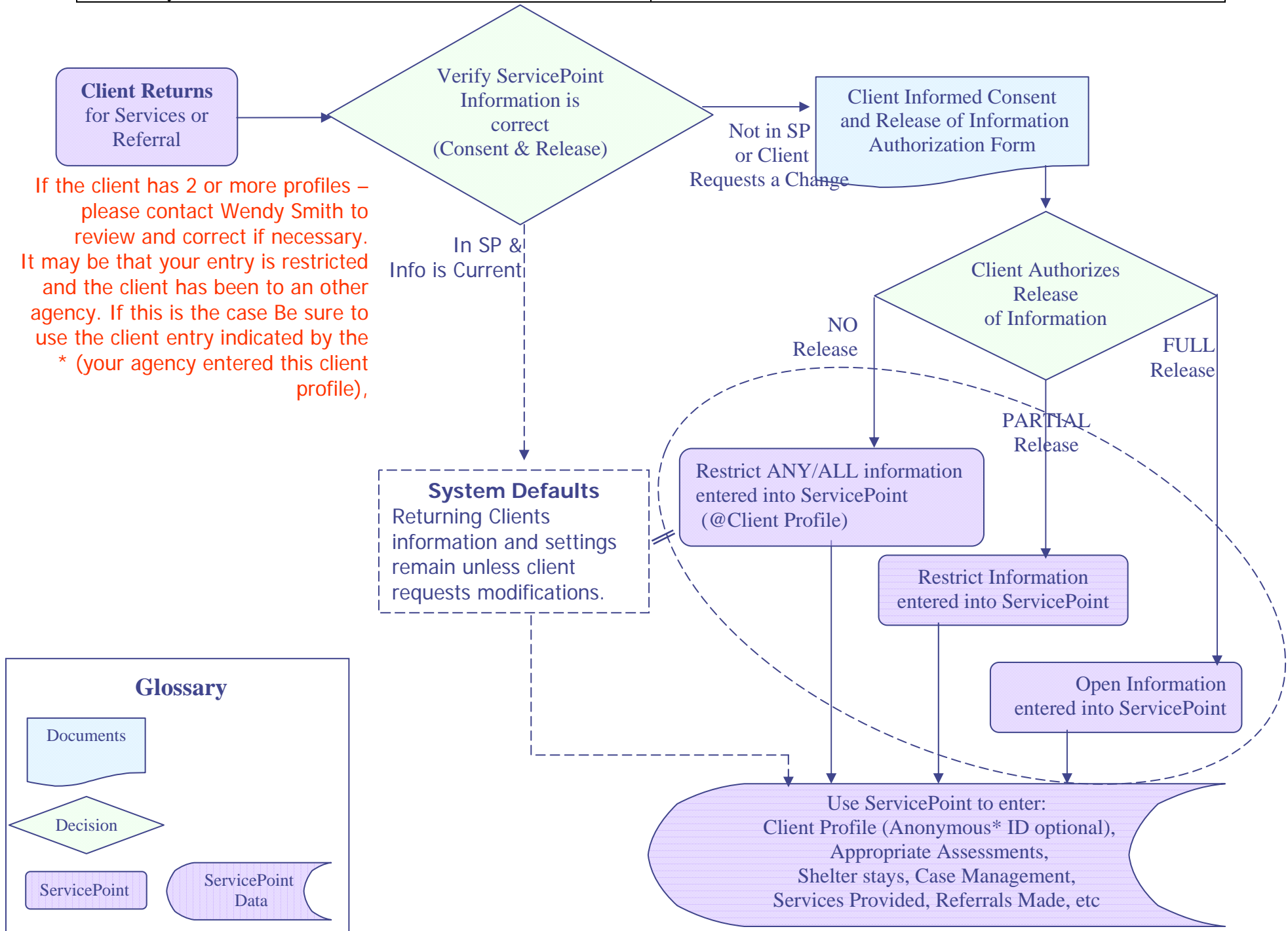
Restrict Information entered into ServicePoint

Open Information entered into ServicePoint

**Glossary**

- Documents
- Decision
- ServicePoint
- ServicePoint Data

Use ServicePoint to enter: Client Profile (Anonymous\* ID optional), Appropriate Assessments, Shelter stays, Case Management, Services Provided, Referrals Made, etc



Use ServicePoint to enter:  
 Client Profile (Anonymous\* ID optional),  
 Appropriate Assessments,  
 Shelter stays, Case Management,  
 Services Provided, Referrals Made, etc

Entry – All  
 Grant/Fund  
 Sources can be  
 identified, for  
 reporting.

Exit- Be sure to  
 answer  
 destination! This  
 will serve as  
 "Outcome  
 Measurement"

1. Create Client:  
 Client's Basic Information  
 (Client Profile)

2. ROI  
 (Release of Information)  
 Identify ALL individuals  
*(Each Adult, Each Head of Household,  
 Each Spouse must sign a consent form)*

3. Create Household –  
 Adding in other  
 Client's Basic Information  
 (Household's Containing...)  
 Remember that CHILD = Unaccompanied Child

4. Entry/Exit  
 (For APR Reporting) Identify  
 ALL individuals This includes  
 the HUD-40118 Assessment

5. Assessments  
 (as needed)  
 Must go to EACH client's file  
 to complete this assessment!  
*(Answer ALL appropriate questions)*

6A. Go to  
 Service Transactions/  
 Log All Needs: Services  
 Provided, Unmet Needs,  
 Referrals  
 Don't Forget Homeless  
 Prevention needs.

6B. Go to  
 ShelterPoint\*/Check  
 Client into Shelter  
 \*This may be done  
 Before 1.



<b>Homeless Management Information System (HMIS)</b>	<b>5.5</b>
Data Entry Work Flow	<b>Revision Date 11/17/2005</b>

1. Create/Find Client: Client's Basic Information (Client Profile; turn on Back Date if needed)

2. ROI (Release of Information) Identify ALL individuals (*Each adult, Each Head of Household, Each Spouse must sign a consent form*) include Security Changes if needed.

1A. Complete Client profile

3. Create Household as needed. Adding in other Client's Basic Information (Household's Containing...)

4. Entry/Exit (For APR Reporting) Identify ALL individuals

**Entry** – All Grant/Fund Sources can be identified, for reporting.

Provider = \_\_\_\_\_

Type = HUD-40118

**Exit** - Be sure to answer destination! This will serve as "Outcome Measurement"

5. Assessments as needed. Must go to EACH client's file to complete this Assessment! (*Answer ALL appropriate questions*)

**It is important to enter accurate dates especially in start date fields.**

6A. Go to Service Transactions.

Log All Needs: Services Provided, Unmet Needs, Referrals

**\*Especially Mainstream referrals**

**Don't Forget Homeless Prevention needs**

**Remember to provide reason when need is unmet (This demonstrates needs for future funding)**

**Be sure to capture:**

Housing Referrals

Supportive Services

Etc...

6B. Go to ShelterPoint/Check Client into Shelter for all Shelter/Housing provided.