PREVENTION HMIS DATA ENTRY CHECKLIST

This document provides a snapshot of the steps involved with managing clients through the HMIS. For more detailed guidance refer to the HMIS Process Guide for ESG/ESG-CV Prevention Service.

- Access the Client Record
    - ✓ EDA into your Prevention bin
    - ✓ Backdate, if necessary
    - ✓ Search for the Client

- Addressing Cancelled Referrals
    - ✓ Update Client Notes at the bottom of the Client Profile screen to reflect the reason for cancelling the referral.
    - ✓ Update the Referral Outcome
        - Referral Outcome: Cancelled
        - Reason: Unable to contact Client

- Addressing Declined Referrals
    - ✓ Update Client Notes at the bottom of the Client Profile screen to reflect the reason for declining the referral.
    - ✓ Update the Referral Outcome
        - Referral Outcome: Declined
        - Reason: Select Reason

- Addressing Accepted Referrals
    - ✓ Create/Edit Household (if applicable)
    - ✓ Add Electronic ROI (Release of Information)
    - ✓ Record (HUD) Project Entry = Same day as initial interview
    - ✓ Record all known data elements at project entry (on MSHMIS RRH and Prevention Intake Assessment) for each family member
    - ✓ Update the Referral Outcome: Accepted
    - ✓ Create Case Plan/ESG Prevention Goal and Document Case Notes
        - Goal Classification: ESG
        - Goal Type: Retain or resettle/safe affordable housing (initial Prevention goal)
        - Status: In Progress
        - Record Case Note
    - ✓ Record applicable Service Transactions.
        - Service Type: select the appropriate service type
        - Service Costs: complete fields for Back Rent or Back Utility
        - Funding Source: City ESG
    - ✓ Record Need Information
        - Need Status: Service Completed
        - Need Outcome: Fully Met

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- Update HMIS Record as a Relationship Develops and Information is Obtained
  - ✓ Continue to update the MSHMIS Update Assessment as information becomes available (update this information via interim review).
  - ✓ Document ongoing case notes (on the Prevention Goal, located under the Case Plans tab)
  - ✓ Record additional services provided, if applicable

- Exit Client from Project
  - ✓ End date all service transactions
  - ✓ End date assigned case manager, if any
  - ✓ Document any final case notes
  - ✓ Update Overall Status of the ESG Prevention Goal
    - Service Completed
  - ✓ Record Project Exit Date = Date client is no longer receiving prevention services
  - ✓ Document Reason for Leaving and Destination
  - ✓ Update any data elements that changed since entry or last interim review (if applicable)
  - ✓ Complete Housing Assessment at Exit fields located at bottom of MSHMIS Exit Assessment