



HMIS PROCESS GUIDE FOR YHDP PSH PROVIDERS

Rev. 07/18/2023

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HMIS PROCESS FOR YHDP PSH PROJECTS

INTRODUCTION

This process guide outlines the HMIS data entry requirements for YHDP-funded Permanent Supportive Housing Projects. It contains detailed step-by-step instructions for creating and maintaining client records in Community Services (Michigan's HMIS platform) and provides a number of appendices that offer additional pertinent information.

IMPORTANT PREREQUISITE NOTICE

This workflow requires that users have a firm understanding of the ClientPoint Module and basic Community Services functionality. Individuals who are either new to the system or are unfamiliar with any aspect of those things mentioned above **MUST** complete the appropriate prerequisite training and closely follow the detailed steps outlined within this process guide. Failure to do so will likely result in data quality and reporting issues.

Experienced end-users may refer to [Appendix V: YHDP PSH HMIS Data Entry Checklist](#) for a high-level overview of the HMIS data entry requirements for YHDP Permanent Supportive Housing Projects.

HMIS DATA COLLECTION: BEFORE CLIENT IS HOUSED

RECEIVING REFERRALS

All referrals for Detroit's PSH projects must come through CAM. Referrals will be received via Community Services and can be accessed by running a Referral Report. For more information, please see [Appendix I: Running Referral Reports & Updating Referral Outcomes](#).

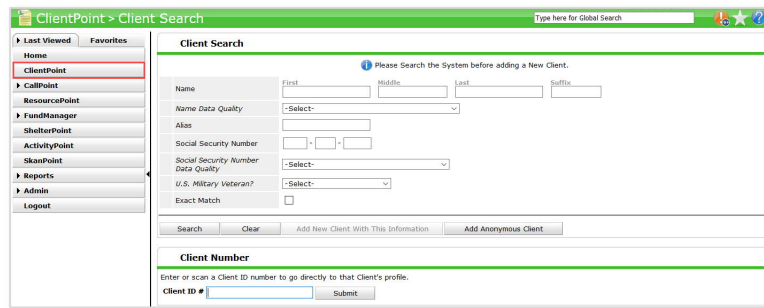
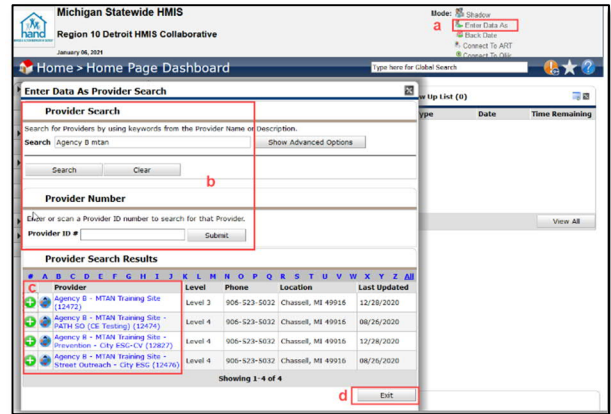
After receiving a referral from CAM, PSH providers must attempt to contact the client to schedule the initial intake meeting. Three attempts must be made, with one of the attempts being an email to the Housing Navigator.

The referral outcome determines the steps that need to be taken within the HMIS. However, all workflows begin with accessing the client record.

ACCESSING THE CLIENT RECORD

The process begins with the following steps:

1. EDA (Enter Data As) into the PSH YHDP bin, if not already defaulted to that provider bin.
 - a. Click on the Enter Data As link located at the top right corner of the screen.
 - b. Search for the YHDP provider bin.
 - c. Click the green plus (+) sign to select that provider.
 - d. Click Exit
2. Select backdate mode, if not entering data in real time.
 - a. Click on the Back Date link located under the Enter Data As link in the upper right-hand corner of your screen.
 - b. Enter the date the data was captured, if not today's date.
 - c. Click Set Back Date.
3. Locate the existing client in ClientPoint.
 - a. Click on ClientPoint located in the left column of the screen.
 - b. Search for the client by entering the client's details or by using the Client ID #.



- To search by the Client Name: enter the client details (i.e. first name, last name); click the Search button; and select the client from the Client Results. If the client is located in the search results, click the client's name in the search results list.
- To search by the Client ID #: enter the Client ID# and click the Submit button.

PROCESSING REFERRALS

Referrals should be Accepted when the provider accepts the client into the project.

Referrals should be Cancelled when the provider is unable to contact the client and/or the client refuses services.

Referrals should be Declined when the provider is declining the client.

IMPORTANT NOTE

Cancelled and declined referrals must be returned to CAM. However, before returning a file to CAM, PSH Providers must complete the following steps:

- 1. Attempt to contact the client on three separate occasions with one of the contacts being an email to the Housing Navigator. These attempts must be documented on the client's Summary page in Community Services along with the PSH provider's contact information and PSH Match Status Outcome.*
- 2. Client must be brought to the PSH Consult Group for discussion before returning. See [PSH Match Policies and Procedures](#) for more information.*

Completing the Detroit Housing Match Assessment

1. Navigate to the Summary tab within the client record.



2. Scroll down to the Detroit Housing Match Assessment

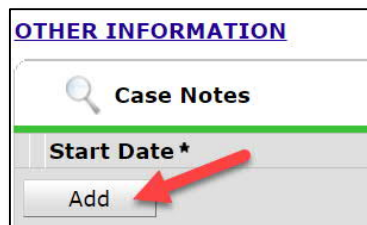
Documenting the Provider Contact Information

3. Navigate to the Detroit Agency Contacts sub assessment
4. Click Add to record the staff member's contact information.



Documenting Attempts to Contact

1. Navigate to the Other Information/Case Notes section of the Detroit Housing Match Assessment.
2. Click the Add button in the Case Note subassessment to add a new case note.
3. Click Save when complete.



Updating the PSH Match Status/Outcomes Sub Assessment

IMPORTANT NOTE

The PSH Match Status/Outcomes must be updated every two weeks until the client is returned to CAM or Housed.

To add a new PSH Match Status record:

1. Navigate to the PSH Match Status/Outcomes section of the Detroit Housing Match Assessment.
2. Click the Add button to create a new record.
3. Record the agency contact information, PSH Match Status, and Reason for Return (if applicable).
4. Click Save when complete.

PSH PROVIDERS: Please complete bi-weekly for all clients matched to your programs ((PSH Outcomes due weekly PSH Consult Group Meeting))

PSH MATCH STATUS/OUTCOMES

Start Date * (Date completing Sub Assessment)	End Date	AGENCY STAFF NAME *	PSH AGENCY *	PSH MATCH STATUS	* IF RETURNED - REASON
Add					

Updating the Referral Outcome (within the Client Record)

The referral outcome must be updated, if not already done within the Referral report. To update the referral outcome within the individual client record, complete the steps listed below.

1. Navigate to the Service Transactions tab and select View Entire Service History.

Client Information

Service Transactions

Service Transaction Dashboard

Add Need	Add Service	Add Multiple Services	Add Referrals	View Previous Service Transactions
View Shelter Stays	View Entire Service History			

2. Navigate to the Referrals tab and click on the pencil icon next to the open referral.

Client Information

Service Transactions


Needs Services Referrals Shelter Stays Entire Service History




Previous Referrals

Select Dates: -Select- [Start Date] [End Date] More Search

Need Date	Referred Date	Referred To	Referral Outcome	Need Type	Need Status	Need Outcome
03/22/2023	03/22/2023	Agency C - MTAN Training Site - YHDP PSH	Accepted	Supportive Housing Placement/Referral	Identified	

3. Scroll to the Referral Data Section and select the appropriate outcome from the Referral Outcome dropdown list of options.

Referral Data 

Referred-To Provider	Agency C - MTAN Training Site - YHDP PSH (13433)		
Needs Referral Date*	03 / 22 / 2023  	10	: 40
Referral Ranking	-Select- v		
VI-SPDAT Score	Please Select a VI-SPDAT Score	Search	Clear
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score	Search	Clear
VI-FSPDAT Score	Please Select a VI-FSPDAT Score	Search	Clear
Referral Outcome	Accepted v 		

4. Click Save & Exit.

RECORDING INTAKE INFORMATION

Updating the Household (if necessary)

1. Click on the Household tab to review/edit household information.

The screenshot shows the 'Client Information' tab with the 'Households' sub-tab selected. A dropdown menu is open, showing '(429577) Female Single Parent'. Below this is a table of household members:

Name	Age	Head of Household	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
(1448337) Data TEST, Data TEST		Yes	Self	06/17/2020	0	1
(1455870) Data TEST, Data Test child		No	Daughter	06/17/2020	0	1

A 'Manage Household' button is located at the bottom left of the table.

NOTE: If the client is part of a household, all family members must be listed under the Household tab as data entry is required on all members of the family. Households are NOT created for single individuals. For more information on Adding/Removing Household Members, refer to [Appendix IV: Additional Resources](#).

Managing the Visibility of the Client Record

IMPORTANT NOTE

An active electronic Release of Information (ROI) MUST be in place for data sharing to occur both internally (within the agency) and externally with other community partners (i.e. CAM, Shelters, Navigators, etc.).

To add a Release of Information:

1. Click the ROI Tab.
2. Click the Add Release of Information button.
 - a. Make sure to include all household members (if applicable).
 - b. Select Release Granted – 'YES'
 - c. Complete the Start Date/End Date and Documentation fields.

The screenshot shows the 'Household Members' form. It includes a list of household members with checkboxes:

- (429577) Female Single Parent
- (1448337) Data TEST, Data TEST
- (1455870) Data TEST, Data Test child

Below the list is the 'Release of Information Data' section with the following fields:

- Provider*: Agency C - MTAN Training Site - YHDP PSH (13433)
- Release Granted*: Yes
- Start Date*: 01/01/2023
- End Date*: 01/01/2025
- Documentation: Signed Statement from Client
- Witness: (empty field)

Buttons for 'Save Release of Information' and 'Cancel' are at the bottom.

NOTE: If the client refuses to share data with external partners, contact HAND's Help Desk <https://www.handetroit.org/helpdesk> to request assistance with adjusting the client record to allow for internal sharing only.

Creating the Project Entry

1. Navigate to the Entry/Exit tab to add a new Project Entry

Client Information | Service Transactions

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

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

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Agency A - MTAN Training Site - Coordinated Entry - HUD CoC-SSO (12471)	Basic	12/30/2020	12/30/2020			

Add Entry / Exit

Showing 1-1 of 1

2. Click the Add Entry/Exit button to add the new Project Entry.

- a. If household members are present, click the box(s) to select them.
- b. Ensure the correct Provider Bin is listed.

Note: if the correct Provider Bin is not listed, then go back to the first step in this workflow to EDA into your YHDP Bin.

- c. Select HUD as the entry Type.
- d. Ensure the Project Start Date equals the date you conduct the Initial Interview.
- e. Click Save & Continue.

Project Start Data - (1448337) Data TEST, Data 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.

- (429577) Female Single Parent
 - (1448337) Data TEST, Data TEST
 - (1455870) Data TEST, Data Test child

Project Start Data - (1448337) Data TEST, Data TEST

Provider* Agency C - MTAN Training Site - YHDP PSH (13433) Search My Provider Clear

Type* HUD

Project Start Date* 01 / 01 / 2023 12 : 08 : 58 PM

Save & Continue Cancel

Completing the Detroit YHDP Housing Intake Assessment

1. Review/update the YHDP Housing Intake Assessment to ensure all answers reflect the client's situation at the time of project enrollment.

Entry Assessment

Household Members

(1448337) Data TEST, Data TEST
Age: 43
Veteran: No (HUD)

Detroit YHDP Housing Intake

GENERAL DEMOGRAPHIC INFORMATION
Answer for All Clients Including Children

2. Review/Update the following sections of the YHDP Housing Intake Assessment to ensure all fields have been completed and answers reflect the client's situation at the time of project enrollment.
 - a. General Demographic Information – completed for household members, including children.
 - b. Health & Disability - completed for household members, including children.
 - c. Housing & Location Information - completed for household members, including children.
 - d. Homeless History Interview - completed for Head of Household and all Adults.

Note: The Prior Living Situation is the living situation that the client was in immediately prior to entering the project. For more information on completing the Homeless History Interview and Determining the Approximate Date of Homelessness refer to [Appendix IV: Additional Resources](#).

- e. Income & Non-Cash Benefit Information - completed for Head of Household and all Adults.
- f. Employment, Education, Domestic Violence, Foster Care and Juvenile Justice Information - completed for Head of Household and all Adults.
- g. Add new Contact Information details (if applicable).

Client's Cell Phone Number	Contact Name	Contact Type *	Contact Phone	Contact E-Mail	Contact Address
No matches.					

- h. Record the initial Self-Reliance & Empowerment (SR&E) Tool scores (Head of Household and all Adults).

Start Date *	Housing Goal	Safety Goal	Tenancy Goal	Income Goal	Transportation Goal	Independent Living Skills Goal	Money Management Goal	Employment Goal	Education Goal	End Date (DO NOT USE)
No matches.										

- i. Record new Current Living Situation details (Head of Household and all Adults).

Start Date *	Information Date	Current Living Situation	Living situation verified by	Is client going to have to leave their current living situation within 14 days?	Location details
No matches.					

- 3. Click Save.
- 4. Complete the Detroit YHDP Housing Intake assessment for each additional Household member, if applicable.

- a. Click the name of the Household member located in the Household Member's column of the assessment.

- b. Verify/complete the above-referenced fields, as applicable, for the selected household member.

Household Members	Detroit YHDP Housing Intake
<input checked="" type="checkbox"/> (1448337) Data TEST, Data TEST Age: 43 Veteran: No (HUD)	GENERAL DEMOGRAPHIC INFORMATION <i>Answer for All Clients Including Children</i> Relationship to Head of Household * -Select- Client Date of Birth: / /
<input checked="" type="checkbox"/> (1455870) Data TEST, Data Test Child Age: 23 Veteran: No (HUD)	

- c. Click Save.
- d. Click on the name of another household member and repeat the process, if applicable.
- e. Go back to the Head of Household record, when finished entering data for all household members. Click Save & Exit.

DOCUMENTING CASE NOTES

IMPORTANT NOTE

All YHDP Housing Providers (TH, RRH, & PSH) are required to document client case notes in the HMIS. As such, at a minimum, providers must create a high-level 'Housing' Goal for the Head of Household where case notes can be recorded.

1. Navigate to the Client Information Tab.
2. Select the Case Plans tab to add client goals and case notes.

The screenshot shows the 'Client Information' tab selected, with the 'Case Plans' sub-tab active. Below the tabs is a 'Goals' section with a table header: Classification, Type, Date Added, Date Set, Notes, Latest Note Date. An 'Add Goal' button is visible in the bottom left corner of the table area.

3. Click the Add Goal button.
 - a. Ensure at a minimum the following required fields are completed.
 - Date Goal was Set.
 - Classification = Housing
 - Type = Achieve Housing Stability.
 - Overall Status – In Progress.

The 'Household Members' form is shown with the following fields and values:

- Provider***: Agency C - MTAN Training Site - YHDP PSH (13433)
- Case Manager**: -Select-
- Date Goal was Set***: 03 / 22 / 2023
- Classification***: Housing
- Type***: Achieve housing stability
- Goal Description**: (Empty text area)
- Target Date**: (Empty date field)
- Overall Status***: In Progress

- b. Click Add Goal.
- c. Click Add Case Note to add the initial case notes pertaining to this goal.
- d. Click Save Case Note.

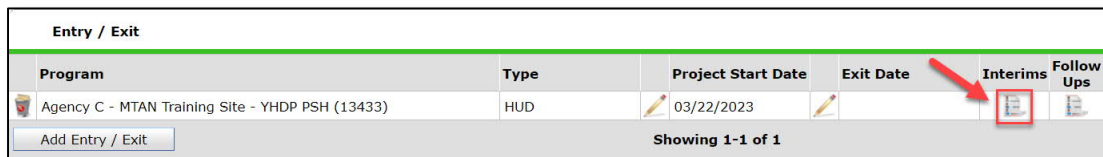
UPDATING AND MAINTAINING CLIENT RECORD

IMPORTANT NOTE

HMIS records should remain "open" (i.e., no project exit date recorded), while clients are still actively receiving services. During this time, it is important that the records continue to be updated and maintained. This includes adding new ROIs, updating the [PSH match status/outcomes](#), recording new data elements (collected after project start), updating assessment data to reflect changes in the client's circumstances, completing Annual Assessment Updates, and documenting ongoing case notes.

Completing Routine Update Interim Reviews

1. Add an Interim review to the Program Entry as follows:
 - a. Navigate to the Entry/Exit tab and click the icon in the Interims column of your open YHDP Program Entry.



Entry / Exit						
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	
Agency C - MTAN Training Site - YHDP PSH (13433)	HUD	03/22/2023				

Add Entry / Exit Showing 1-1 of 1

- b. Click Add Interim Review.
- c. Check all relevant Household members for which the review is relevant; check the Household type to choose all household members.



Household Members

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

- (429577) Female Single Parent
- (1448337) Data TEST, Data TEST (Entry Date: 02/23/2021 7:17 PM)
- (1455870) Data TEST, Data Test child (Entry Date: 02/23/2021 7:17 PM)
- (1455876) Data TEST, Test Child 2 (Entry Date: 02/23/2021 7:17 PM)

- d. Select Update from the Interim Review Type dropdown list of options.
- e. Make sure the Review Date is set to the date that the change took place.
- f. Click Save & Continue to proceed to the Detroit YHDP Update Assessment.

Completing the Trafficking/Exploitation Screening

YHDP Housing Providers must attempt to complete the Trafficking/Exploitation Screening with all youth once a relationship has been established. Providers should use the script provided on the Detroit YHDP Update Assessment to elicit responses to the four screening questions listed below.

TRAFFICKING/EXPLOITATION SCREENING
Answer for Head of Household and Adults
It is not uncommon for young people to stay in situations that are risky or dangerous, simply because they have no other options.

Have you ever worked, or done other things, in a place that made you feel scared or unsafe? -Select- G

Sometimes people are prevented from leaving an unfair or unsafe situation

Have you ever been afraid to quit work or leave a relationship due to threats of violence to yourself, your reputation, family or friends? -Select- G

Sometimes young people who are homeless or have difficulties with their families have very few options to survive or fulfill basic needs like food/shelter.

Ever received something in exchange for sex (e.g. money, food, drugs, shelter) -Select- G

Sometimes young people are told to lie about what they do.

Has anyone ever asked you to lie about what they make you do (like a boss, partner, or family member)? -Select- G

Recording New Self-Reliance & Empowerment Tool Scores

A new Self-Reliance & Empowerment (SR&E) assessment must be completed every quarter, at a minimum. Do not end date, overwrite, delete, or edit the initial intake SR&E record.

1. Navigate to the Self-Reliance and Empowerment Tool section of the update assessment.
2. Click Add

SELF-RELIANCE AND EMPOWERMENT TOOL
Answer for Head of Household and Adults

Self-Reliance and Empowerment Tool

	Start Date*	Housing Goal	Safety Goal	Tenancy Goal	Income Goal	Transportation Goal	Independent Living Skills Goal	Money Management Goal	Employment Goal	Education Goal
🗨️	03/22/2023	Yes	Yes	Yes	No	No	No	No	No	No

Showing 1-1 of 1

Updating Static Assessment Data

To record changes to static assessment data:

1. Navigate to the assessment question that needs to be updated
 - a. Adjust the dropdown response to reflect the updated status.
 - b. Clicking the colored bar icon next to the assessment question provides historical response data.

DOMESTIC VIOLENCE INFORMATION

Domestic violence victim/survivor b a

Yes (HUD) G

Updating HUD Sub Assessment Data

It is important to never overwrite HUD's sub assessment records! Each time there is a change in *income, noncash benefits, health insurance, and/or disability information*, a new record must be added.

1. Locate and click the edit pencil next to the sub assessment record that needs updating.

The screenshot shows two windows. The left window, titled 'Monthly Income', contains a table with columns: Monthly Amount, Source of Income, Receiving Income Source?, Start Date*, and End Date. A red arrow points to the edit pencil icon in the first column of the third row, which is 'Earned Income (HUD)'. The right window, titled 'Add Recordset - (1448337) Data TEST, Data TEST', shows a form for adding a new record with fields for Monthly Amount (500.00), Source of Income (Earned Income (HUD)), Receiving Income Source? (Yes), Start Date* (04/01/2023), and End Date.

2. Add an end date on the current record (i.e. the day before the change occurred) to indicate the information is no longer accurate as of that date.
 - a. Click Save and Add Another to record the new information.
3. Record new income information. Complete all of the required fields to reflect the change that occurred.
 - a. Click Save
4. Verify that the start and end dates for the sub assessment records you updated don't overlap.

Monthly Income						
	Provider	Monthly Amount	Source of Income	Receiving Income Source?	Start Date	End Date
	Agency C - MTAN Training Site - YHDP PSH (13433)		Alimony or Other Spousal Support (HUD)	No	01/01/2023	
	Agency C - MTAN Training Site - YHDP PSH (13433)		Child Support (HUD)	No	01/01/2023	
	Agency C - MTAN Training Site - YHDP PSH (13433)		Earned Income (HUD)	No	01/01/2023	03/31/2023
	Agency C - MTAN Training Site - YHDP PSH (13433)	US\$500.00	Earned Income (HUD)	Yes	04/01/2023	

5. Be sure to update the sub assessment gateway question(s) if applicable

Adding Additional Case Notes

To add additional case notes to the existing goal:

- 1) Navigate to the Case Plans tab and click the Notes icon for the Goal.

The screenshot shows a table titled 'Goals' with columns: Classification, Type, Date Added, Date Set, Notes, and Latest Note Date. A red arrow points to the 'Notes' column, which contains a blue speech bubble icon. The table shows one goal: Housing, Achieve housing stability, 03/13/2023, 01/01/2023, and 01/01/2023.

- 2) Click the Add Case Note button to open another window for adding the case note.
- 3) Add the Case Note and Save.

HMIS DATA COLLECTION: AFTER CLIENT IS HOUSED

UPDATING AND MAINTAINING CLIENT RECORD CONTINUED

Recording the Housing Move-In Date (HMD)

All RRH & PSH Projects must create an [Update Interim Review](#) to record the Housing Move-In Date (HMD) when a client first moves into a unit. The Interim Review Date must be the same as the Housing Move-In Date.

REMEMBER to also update the [PSH Match Status/Outcomes](#) and Current Living Situation!!





Complete for RRH & PSH Only

HOUSING MOVE-IN DATE

Answer for All Clients Including Children

The Housing Move-In Date question differentiates between clients who are awaiting placement and those who have moved into any type of permanent housing (RRH, PH, PSH), regardless of funding source or whether the project is providing rental assistance.

This must be entered via an interim assessment with a timestamp that occurs after the project start and before the project exit. If the client is not in housing, leave this question blank.

Housing Move-in Date / /    

NOTE: There should only be one HMD recorded per project enrollment. If a client loses housing after moving into a unit, the client record should be closed, and a new project enrollment should be created for the following day. The HMD on the new enrollment should be left blank until the client moves into a new permanent housing situation.






NOTE: An HMD should be recorded for clients that move into any permanent housing situation, regardless of whether financial assistance is provided. This includes clients, not housed by the program, that exit to family/friends (permanently) or to their own unit without any subsidy.

Completing Annual Assessment Interim Reviews

IMPORTANT NOTE

Annual Assessments must be completed at least once a year for all household members that receive services for 365 days or more. Annual Assessments must be completed no more than 30 days before or after the anniversary of the head of household's Project Start Date.

1. Add an Interim review to the Program Entry as follows:
 - a. Navigate to the Entry/Exit tab and click the icon in the Interims column of your open YHDP Program Entry.

Entry / Exit					
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups
 Agency C - MTAN Training Site - YHDP PSH (13433)	HUD	 03/22/2023			
Add Entry / Exit		Showing 1-1 of 1			

- b. Click Add Interim Review.
- c. Check the box to include all relevant Household members.

Household Members


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

(429577) Female Single Parent

(1448337) Data TEST, Data TEST (Entry Date: 02/23/2021 7:17 PM)

(1455870) Data TEST, Data Test child (Entry Date: 02/23/2021 7:17 PM)

(1455876) Data TEST, Test Child 2 (Entry Date: 02/23/2021 7:17 PM)

- d. Select Annual Assessment from the Interim Review Type dropdown list of options.
- e. Make sure the Review Date is set to the date that the change took place.
- f. Click Save & Continue to proceed to the Detroit YHDP Update Assessment.
- g. Update income, non-cash benefit, and health insurance information regardless of whether responses have changed since the project start or previous annual assessment.

NOTE: A new record must be created for each subsequent annual assessment such that it is possible to view a history, by date, of the values for each data element. See [Updating HUD Sub Assessment Data](#) for more information.

EXITING THE CLIENT

Recording Client Discharge Information

1. Click the pencil next to the Exit Date in the Entry/Exit screen.

Entry / Exit							
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
Agency B - MTAN Training Site - YHDP Crisis Mental Health Team (13575)	HUD	04/20/2023	10/20/2023				
Agency C - MTAN Training Site - YHDP PSH (13433)	HUD	03/22/2023					

Add Entry / Exit Showing 1-2 of 2

2. Check the box to include all household members, if applicable.
3. Add the Exit Date, which is the day the household leaves the unit and/or is no longer receiving services from the project.
4. Select the Reason for Leaving from the dropdown list of options.
5. Select the appropriate Destination from the drop-down list of options.
6. Add Notes, if applicable.

Household Members

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

(429577) Female Single Parent

(1448337) Data TEST, Data TEST

(1455870) Data TEST, Data Test child

Edit Exit Data - (1448337) Data TEST, Data TEST

Exit Date * 04 / 05 / 2023 4 : 18 : 01 PM

Reason for Leaving Completed program

If "Other", Specify

Destination * Rental by client, no ongoing housing subsidy (HUD)

If "Other", Specify

Notes

7. Scroll down to the Detroit YHDP Exit Assessment
 - a. Record the Project Completion Status (new data element collected at exit) for the Head of Household and any Adults.
 - b. Complete the Safe and Appropriate Exit Information (new data element collected at exit) for the Head of Household and any Adults.
 - c. Update the Health Status Information for the Head of Household and any Adults to reflect that status at time of exit.
 - d. Create a new Self-Reliance & Empowerment record to capture the client status for each domain at time of exit.
 - e. Update any other information that may have changed for the clients since the project start or last interim review.

8. Click Save.
9. Complete the Detroit YHDP Exit assessment for each additional Household member, if applicable.

- a. Click the name of the Household member located in the Household Member's column of the assessment.

Household Members	Detroit YHDP Exit
<input checked="" type="checkbox"/> (1448337) Data TEST, Data TEST Age: 43 Veteran: No (HUD)	***APPLIES TO ALL PROJECTS <u>PROJECT COMPLETION STATUS</u>
<input checked="" type="checkbox"/> (1455870) Data TEST, Data Test child Age: 23 Veteran: No (HUD)	

- b. Verify/complete the above-referenced fields, as applicable, for the selected household member.
- c. Click Save.
- d. Click on the name of another household member and repeat the process, if applicable.
- e. Go back to the Head of Household record, when finished entering data for all household members.

10. Click Save & Exit.

RECORDING AFTERCARE ACTIVITY

IMPORTANT NOTE

Youth participating in Detroit's YHDP housing-related projects are eligible to receive up to 12 months of aftercare services.

The depth and breadth of services provided will vary depending on need. Providers should utilize the Self-Reliance & Empowerment Tool, in conjunction with youth input, to determine the length and extent of services needed.

At a minimum, providers should conduct monthly home visits with clients receiving aftercare services and complete a new Self-Reliance & Empowerment assessment with those youth each quarter.

Youth are not required to receive aftercare and may decline services if they wish. However, each client discharged from services must have at least one aftercare record entered in the HMIS indicating whether or not services were provided.

Creating the Mandatory Aftercare Record

1. Add a Follow Up record after project exit as follows:
 - a. Navigate to the Entry/Exit tab and click the icon in the Follow Ups column

Entry / Exit						
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Agency B - MTAN Training Site - YHDP Crisis Mental Health Team (13575)	HUD	04/20/2023	10/20/2023			
Agency C - MTAN Training Site - YHDP PSH (13433)	HUD	03/22/2023	04/10/2023			

Showing 1-2 of 2

- b. Click Add Follow Up Review.
 - c. Check the box to include all relevant Household members.
 - d. Select Aftercare (Post Exit) from the Follow Up Review Type dropdown list of options.
 - e. Make sure the Review Date is set to the date that the follow-up took place (or the exit date for households NOT receiving aftercare services).
 - f. Click Save & Continue to proceed to the Detroit YHDP Aftercare Assessment.

Add Follow Up Review - (1448337) Data TEST, Data TEST

Household Members

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

- (429577) Female Single Parent
- (1448337) Data TEST, Data TEST (Exit Date: 04/10/2023 1:00 PM)
- (1455870) Data TEST, Data Test child (Exit Date: 04/10/2023 1:00 PM)

Follow Up Review Data

Entry / Exit Provider: Agency C - MTAN Training Site - YHDP PSH (13433)

Entry / Exit Type: HUD

Follow Up Review Type: **Aftercare (Post Exit)**

Review Date: 1 : 02 : 20 PM

Buttons: Save & Continue, Cancel

Completing Assessment for Clients **NOT** Receiving Aftercare

1. Navigate to the Provision of Aftercare Services section of the Detroit YHDP Aftercare Assessment.
 - a. Select No from the dropdown list next to the 'Aftercare was provided' question.
 - b. Scroll to the bottom of the assessment and click Save
2. Complete the steps above for all Adults in the household
 - a. Click Save & Exit when finished.

Detroit YHDP Aftercare Assessment

Answer for Head of Household and Adults

PROVISION OF AFTERCARE SERVICES

Aftercare was provided -Select-

If yes to "Aftercare was provided" - Identify how it was provided:

Via email/social media	-Select-
Via telephone	-Select-
In person: one-on-one	-Select-
In person: group	-Select-

Completing Assessment for Clients Receiving Aftercare

IMPORTANT NOTE

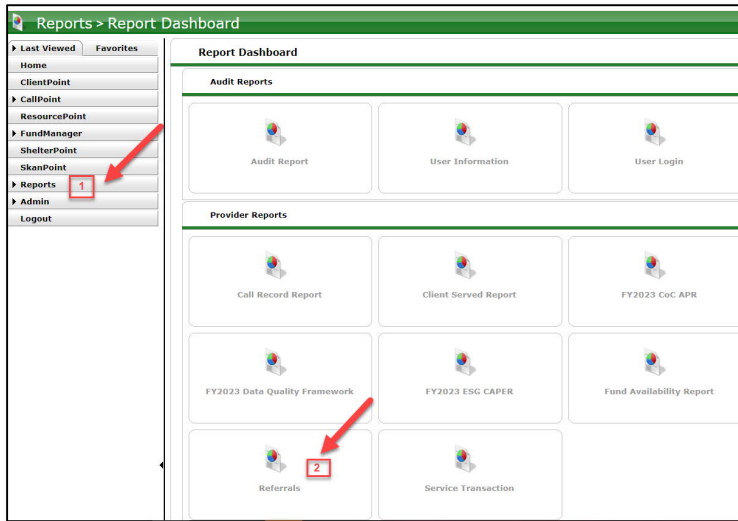
At a minimum, providers should conduct monthly home visits with clients receiving aftercare services. A new HMIS follow-up record should be completed at the time of each home visit. Providers may have more frequent contact with clients. However, it is not necessary to create a new follow-up record for each contact. Providers can document the additional types of contact that they had with the client between visits on the monthly aftercare record.

- ✓ Complete the following sections of the Detroit YHDP Aftercare Assessment
 - Provision of Aftercare Services – Select Yes for the 'Aftercare was provided' field and document all the ways that aftercare was provided throughout the month.
 - Housing Stability –
 - i. Create a new Current Living Situation record if the client's living situation has changed.
 - i. Answer/Update the 'Has the client remained housed' field
 - ii. Answer/Update the 'Is the client experiencing difficulty maintaining housing' question and record any applicable notes.
 - Self-Reliance & Empowerment Tool – Record new SR&E responses each quarter (at a minimum).
 - Client Status Updates – Update any information that has changed for the client in regard to Contact Information, Pregnancy Status, Income & Noncash Benefits, Employment and/or Education.
- 2. Scroll to the bottom of the assessment and click Save
- 3. Complete the steps above for all Adults in the household
- 4. Click Save & Exit when finished.

APPENDIX I: RUNNING REFERRAL REPORTS & UPDATING REFERRAL OUTCOMES

Running the Referral Report

1. Click on the Reports tab
2. Click Referrals report



3. Make sure the correct Provider is selected
4. Referral Type = Incoming Referrals
5. Referral Status = All
6. Referral Outcome = All
7. Enter Referral Date Range (NOTE: start date should be 1 day before first referral was made)
8. Select desired Sort Order (Optional)
9. Click Build Report (report results will display)

Report Options	
Provider *	Agency C - MTAN Training Site - YHDP PSH (13433) <input type="button" value="Search"/> <input type="button" value="My Provider"/> <input type="button" value="Clear"/>
	<input type="radio"/> This provider AND its subordinates <input checked="" type="radio"/> This provider ONLY
Referral Type *	Incoming referrals to provider <input type="button" value="v"/>
Referral Status	<input type="radio"/> Outstanding <input type="radio"/> Closed <input checked="" type="radio"/> ALL
Referral Outcome	-All- <input type="button" value="v"/>
Referral Date Range	01 / 01 / 2023 <input type="button" value="v"/> <input type="button" value="v"/> <input type="button" value="v"/> 01 / 15 / 2023 <input type="button" value="v"/> <input type="button" value="v"/> <input type="button" value="v"/>
Sort Order	Please Select a Sort Order <input type="button" value="Select"/> <input type="button" value="Clear"/>
<input type="button" value="Export Report"/>	<input type="button" value="Build Report"/>

Updating Referral Outcomes (within the Referral Report)

IMPORTANT NOTE

Only those with an Agency Admin license or higher will have the option to update referral outcomes within the Referral Report. Case Managers and those with a lower level of access will only be able to update referral outcomes for individual clients within the client record. For more information refer to [Updating the Referral Outcome \(within the Client Record\)](#) section of this process guide.

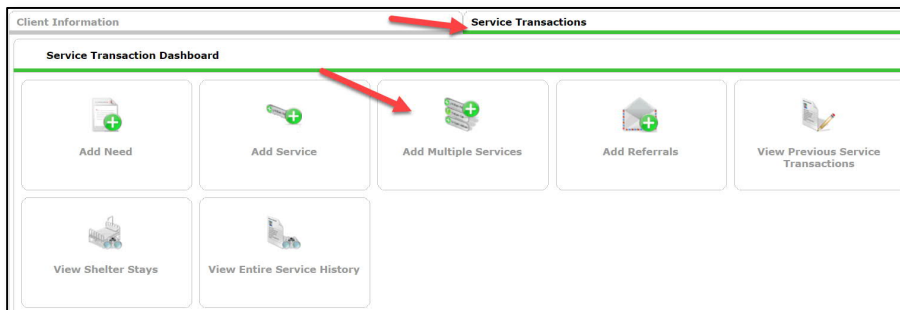
1. Check the box next to the name(s) of the clients with a known referral outcome
2. Click the Update Referral Outcome button located at the bottom of the Referral Results list
3. Select the appropriate Referral Outcome from the dropdown list
 - a. Accepted: if client is accepted into the project
 - b. Declined: if the project declines the referral
 - c. Canceled: if the project is unable to contact client or the client declines services
4. Click Save Referral Information

The screenshot displays the 'Report Results' interface. A table lists referral records with columns for Referral Date, Name, Group ID, Ranking, VI-SPDAT, TAY-VI-SPDAT, VI-FSPDAT, Need Type, Referred By, Referred To, and Referral Outcome. A red box labeled '1' highlights a checkbox next to a referral record. Below the table, a red box labeled '2' highlights the 'Update Referral Outcome' button. An 'Update Referral Outcome' dialog box is open, showing a message: 'The selected (1) Referral will receive the outcome selected below.' A red box labeled '3' highlights the 'Referral Outcome' dropdown menu, which is set to 'Accepted'. A red box labeled '4' highlights the 'Save Referral Information' button at the bottom of the dialog.

Referral Date	Name	Group ID	Ranking	VI-SPDAT	TAY-VI-SPDAT	VI-FSPDAT	Need Type	Referred By	Referred To	Referral Outcome
03/22/2023 10:40:11 AM	(1448337) Data TEST, Data TEST						Supportive Housing Placement/Referral	Agency A - MTAN Training Site - Coordinated Entry - HUD CoC-SSO	Agency C - MTAN Training Site - YHDD-PSH	Accepted

APPENDIX II: RECORDING SERVICE TRANSACTIONS (OPTIONAL)

1. Click on the Service Transactions tab
2. Select Add Multiple Services



- a. Add applicable Household Members to the service transaction as appropriate by checking the box next to the household member's name.

NOTE: Financial assistance services should only be entered for the head of household. Including other household members will inflate the total cost of financial assistance provided on service reports.

- b. Ensure the Service Provider is correctly displayed.

3. Scroll down to Service List section
 - a. Leave the Number of Services set to 1
 - b. Establish the Start and End date for the service.

NOTE: Most service transactions should be dated for the day the funds were administered and/or the service was provided. In many cases, the start and end date will be the same day.

For ongoing Rent Payment Assistance, the service transaction should cover the entire month that the payment was applied to. The start date should be the first of the month (or the payment start date if the client moved in after the 1st) and the end date should be the end of the month.

For example, if a household receives rent payment assistance from July-September, the head of household should have three separate Rent Payment Assistance service transactions with the following start and end dates: 07/01/2023-07/31/2023, 8/1/2023-8/31/2023, and 9/1/2023-9/30/2023

- c. Select the Service Type by clicking the Pencil Icon and choosing the appropriate service from the dropdown list of options.

Service List

a **Number of Services** *

b **Start Date** * / / : : AM

End Date / / : : AM

c **Service Type** * Rental Deposit Assistance (BH-3800.7250)

NOTE: To record rent arrearage assistance, select the Rent Payment Assistance Service Type and complete the Service Cost section (see Step 4 below).

4. For Back Rent/Back Utility Payments ONLY - Scroll down to Service Costs section (otherwise skip to Step 5)
 - a. Enter the Number of Units (i.e. months) being covered for back rent or back utility
 - b. Select the appropriate Unit Type from the drop-down menu (back rent or utility arrearage)
 - c. Add the Cost Per Unit (i.e. total rent per month)

NOTE: The Total Cost of Units will be calculated automatically upon Save & Exit

Service Costs

a Number of Units

b Unit Type

c Cost per Unit \$

Total Cost of Units \$

5. For Financial Services Only – Scroll down and click the arrow next to the Apply Funds for Services section to expand (otherwise skip to Step 6)
 - a. Scroll down to Funding Sources and click Add Funding Source

Apply Funds for Service

Distribute as Voucher Yes No

Vendor's Client Account Number

Name on Bill

Vendor *Please Select a Vendor*

Code for Accounting Department

Funding Sources

Source

Client Co-Pay

- b. Use the Fund Search option to search for YHDP
- c. Click the Green Plus Icon to select the YHDP option.

Add Funding Source

Fund Search

Search for Funds by using keywords for Fund Name, Category, or Description.

Search

Show Matching Funds ONLY

Fund Search Results

Fund ▲	Submission Deadline
YHDP	N/A

- f. Enter the financial amount of the YHDP service along with the Client Co-Pay, if applicable.

Funding Sources

Source	Amount
Client Co-Pay	\$ 100.00
YHDP	800.00

Save Submission Completed

Total: \$900.00

6. Navigate to the Need Information section.
 - a. Select Service Completed from the Need Status dropdown list of options.
 - b. Select Fully Met from the Outcome of Need dropdown list of options.

Need Information

a Need Status *

b Outcome of Need

If Need is Not Met, Reason

7. Click the Add Another button to add additional services, if applicable.
8. Click Save & Exit once all services are added

APPENDIX III: ASSIGNING A CASE MANAGER (OPTIONAL)

1. Navigate to the Case Managers tab
2. Click 'Add Case Manager'



3. Check the Box to include all household members (if applicable)
4. Select Type
 - a. Other: Allows users to manually enter Case Manager details (use if the Case Manager is not the same person that is completing the data entry).
 - b. Me: Auto-populates the Case Manager details for the individual completing the data entry.
5. Make sure that the correct Provider is listed (i.e. YHDP PSH project)
6. Make sure that the correct Start Date is listed
7. Leave the End Date blank (until the case manager is no longer working with the client).

The screenshot shows a form titled 'Case Manager - (1448337) Data TEST, Data TEST'. The form is divided into several sections. At the top, there is a section for 'Household Members' with a dropdown arrow. Below this, there is an information icon and a message: 'To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.' There are three checkboxes: one for '(429577) Female Single Parent' which is checked, one for '(1448337) Data TEST, Data TEST' which is checked and has a red box around it, and one for '(1455870) Data TEST, Data Test child' which is checked. Below the checkboxes, there is a 'Type*' field with three radio buttons: 'Community Services User', 'Me', and 'Other' (which is selected). There are four text input fields: 'Name*', 'Title', 'Phone Number', and 'Email Address'. Below these fields, there is a 'Provider*' field with the text 'Agency C - MTAN Training Site - YHDP PSH (13433)' and three buttons: 'Search', 'My Provider', and 'Clear'. There are two date fields: 'Start Date*' with the value '04 / 11 / 2023' and 'End Date' which is blank. Both date fields have calendar icons. At the bottom of the form, there are two buttons: 'Add Case Manager' and 'Cancel'.

APPENDIX IV: ADDITIONAL RESOURCES

Resource Type	Description	URL
Job Aid: Creating and Managing Households	Step-by-step instructions for: <ul style="list-style-type: none"> - Creating a new household - Adding new members to an existing household/entry - Removing members when they leave a household 	https://static1.squarespace.com/static/5344557fe4b0323896c3c519/t/6123b7ca057dc2593a0f2973/1629730764342/HAND+Job+Aid+-+Creating+and+Managing+Households.pdf
Homeless History Interview Guide	Detailed guidance for completing the Homeless History Interview section of the HMIS Intake Assessment.	https://static1.squarespace.com/static/5344557fe4b0323896c3c519/t/64355641faa7052c0b05aea1/1681217089648/Homeless+History+Interview+Guide.pdf
Determining Approximate Date of Homelessness	Examples of follow-up questions that should be asked of clients when completing the Homeless History Interview to help ensure the correct date is entered in HMIS for the client's Approximate Date of Homelessness.	https://static1.squarespace.com/static/5344557fe4b0323896c3c519/t/643555cc57e21322d7a0972/1681216972295/Determining+Approximate+Date+of+Homelessness+02.pdf
Permanent Housing Entry/Exit & Move-In Guidance	Detailed guidance regarding the nuances involved with PSH/RRH referrals, project start dates, housing move-in dates, and project exits. As well as detailed guidance for managing transfer clients and housing displacements.	https://static1.squarespace.com/static/5344557fe4b0323896c3c519/t/61e19df0ca610d6b667a384e/1642175984217/Permanent+Housing+Entry-Exit+and+Move-in+Guidance.pdf
Running, Reviewing, and Printing the CoC APR	Step-by-step instructions for running and printing the CoC APR. As well as detailed guidance for finding and fixing common errors within the COC APR.	https://static1.squarespace.com/static/5344557fe4b0323896c3c519/t/629e53f2279e4539bbb805da/1654543373773/Running+%2C+Reviewing%2C+and+Printing+the+Coc+APR.pdf
Finding & Fixing Errors in APR	Detailed instructions for interpreting and fixing errors within the CoC APR.	https://static1.squarespace.com/static/5344557fe4b0323896c3c519/t/61e19cbaa7d41c510161e260/1642175677851/Finding+and+Fixing+Data+Quality+Errors+CoC+APR+and+ESG+CAPER+20210730.pdf
PSH Moving On Service Transaction Resource Guide	Detailed instructions for capturing required data on PSH clients that are receiving Moving On Assistance.	https://static1.squarespace.com/static/5344557fe4b0323896c3c519/t/623cc49ef5ae30798a95ce5e/1648149719229/PSH+-+Moving+On+Service+Transaction+Guide.pdf

APPENDIX V: YHDP PSH HMIS DATA ENTRY CHECKLIST

Below is a high-level overview of the HMIS workflow requirements for YHDP-funded Permanent Supportive Housing (PSH) projects.

Receive/Process Referral

- ✓ Run Referrals Report
- ✓ Access Client Record (EDA into PSH YHDP Bin, if not defaulted there)
- ✓ Complete the Detroit Housing Match Assessment sections below (on the Client Summary Tab):
 - Detroit Agency Contacts
 - Case Notes (document attempts made to contact client)
 - PSH Match Status/Outcomes (must be updated every two weeks until the client is housed or returned to CAM)
- ✓ Update the Referral Outcome

Cancelled/Declined Referrals – End of HMIS Workflow

Accepted Referrals – Proceed to Record Intake Information

Record Intake Information

- ✓ Review/Edit Household (if applicable)
- ✓ Add Electronic ROI (Release of Information), include all HH members (if applicable)
- ✓ Record (HUD) Project Entry for all HH members (if applicable)
 - Start Date = Date of Intake Meeting
- ✓ Review/Update Detroit YHDP Housing Intake Assessment questions for all HH members (if applicable)
 - Record the initial Self-Reliance & Empowerment scores
- ✓ Create Case Plan & Document Initial Case Notes
 - Goal Classification: *Housing*
 - Goal Type: *Achieve Housing Stability*
 - Status: *In Progress*
 - Record Case Note

Update & Maintain Client Record

- ✓ Add Update Interim Reviews
 - Complete Trafficking/Exploitation Screening (after relationship has been established)
 - Record Housing Move-In Date (after client moves into a unit)
 - REMEMBER to also update the [PSH Match Status/Outcomes](#) and Current Living Situation!!
 - Continue to update the client record to reflect changes (i.e. income, non-cash benefits, current living situation, contact information, Self-Reliance & Empowerment scores, etc.)
 - Create new Self Reliance & Empowerment records each quarter (at a minimum).
- ✓ Add an Interim Review (Type: Annual Assessment)
 - Complete a new Annual Assessment for all household members (30 days +/- the anniversary of the head of household's project start date)
- ✓ Document ongoing case notes (on Housing Goal, located under Case Plans tab)
 - Minimum of one case note per month
- ✓ Continue to update the PSH Match Status/Outcomes (until client is housed)

Exit the Client from Project

- ✓ Record Project Exit Date = Date client leaves the PSH units and/or stops receiving services from the project.
 - Document Reason for Leaving & Destination
 - Complete the Detroit YHDP Exit Assessment including
 - *Project Completion Status* (New discharge fields)
 - *Safe and Appropriate Exit Information* (New discharge fields)
 - *Health Status* (update responses given at entry)
 - *Self-Reliance & Empowerment Tool* (New record created at exit)
 - Update any data elements that changed since entry (or last interim review)

IMPORTANT NOTE

Youth participating in Detroit’s YHDP housing-related projects are eligible to receive up to 12 months of aftercare services.

The depth and breadth of services provided will vary depending on need. Providers should utilize the Self-Reliance & Empowerment Tool, in conjunction with youth input, to determine the length and extent of services needed.

At a minimum, providers should conduct monthly home visits with clients receiving aftercare services and complete a new Self-Reliance & Empowerment assessment with those youth each quarter.

Youth are not required to receive aftercare and may decline services if they wish. However, each client discharged from services must have at least one aftercare record entered in the HMIS indicating whether or not services were provided.

Clients NOT Receiving Aftercare

- ✓ Select No for the ‘Aftercare was provided’ field (located under the Provision of Aftercare Services section of the Detroit YHDP Aftercare Assessment)
 - Complete for the Head of Household and all Adults
- ✓ Save & Exit (End Workflow)

Clients Receiving Aftercare

At a minimum, providers should conduct monthly home visits with clients receiving aftercare services. A new HMIS follow-up record should be completed at the time of each home visit.

- ✓ Complete the following sections of the Detroit YHDP Aftercare Assessment for the Head of Household and all Adults
 - Provision of Aftercare Services – Select Yes for the ‘Aftercare was provided’ field and document all the ways that aftercare was provided throughout the month.
 - Housing Stability –
 - i. Record a new Current Living Situation record if the client’s living situation has changed.
 - ii. Answer/Update the ‘Has the client remained housed’ field
 - iii. Answer/Update the ‘Is the client experiencing difficulty maintaining housing’ question and record any applicable notes.
 - Self-Reliance & Empowerment Tool – Record new SR&E responses each quarter (at a minimum).
 - Client Status Updates – Update any information that has changed for the client in regard to Contact Information, Pregnancy Status, Income & Noncash Benefits, Employment and/or Education.