Hotel/Motel HMIS Workflow

If the hotel/motel project receives referrals in HMIS, begin by running the Referrals Report (see Receiving & Updating Referrals for detailed instructions)

Create HMIS Entry

The process below must be completed when a household first enters the hotel/motel:

1. All data must be entered in the appropriate **Hotel/Motel bin** (use EDA if necessary)

2. Select **backdate mode**, if not entering data in real time

3. **Search** for Client

4. Review/Edit **Household** (if needed)

5. Add e-**ROI** (apply to all household members)

6. Create **Project Entry** (include all household members)
    - Project **Start Date** = **1st day in hotel/motel**
    - Complete **MSHMIS Street & Shelter Intake Assessment** (for each household member)

7. Create Case Plan/Case Notes (**REQUIRED FOR CITY FUNDED PROJECTS**)
    - Create Case Plan to record all ongoing case notes
        - Classification: ESG
        - Type: Discharge to Permanent Housing (initial ES & SO goal)
    - Add Case Notes

8. If applicable, update CAM Referral Outcome: Accepted, if not done via the Referral Report

Maintain HMIS Record

Leave HMIS record open while client is in the hotel/motel:

1. Document changes to assessment data via an **Interim Review/Update**
    - This may include ***changes to income and/or non-cash*** benefits that occur after the project start date.

2. Optional: Add **Service Transactions** as they occur (see 'Adding HMIS Service Transactions' for detailed instructions).

Close HMIS Record

Close record when client is no longer residing the hotel/motel:

1. If applicable, ensure all Case Notes are documented (update goal outcome)
2. **Create Project Exit** (by clicking the **Edit Pencil next to Exit Date**)
    a. **Project Exit Date = Day client leaves hotel/motel**
    b. Select appropriate **Reason for Leaving** & **Destination**
    c. Review and update client assessment data, if necessary.
    d. Save & Exit -----END WORKFLOW-----

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Adding HMIS Service Transaction(s)

1. Click on the **Service Transactions** tab
2. Select **Add Multiple Services**
    a. Ensure the **Service Provider** is correctly displayed.
    b. Leave the **Number of Services** set to **1.**
    c. Establish the start and end date for the service.
        i. **Start Date** = the date the service is provided (if not already set in backdate mode).
        ii. **End Date** = the start date.
    d. Select the **Service Type** by clicking the **Pencil** Icon and choosing the appropriate service from the dropdown list of options.
3. 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.
4. Click the **Add Another** button to add additional services, if applicable.
5. Click **Save & Exit** once all services are added

Receiving and Updating Referrals

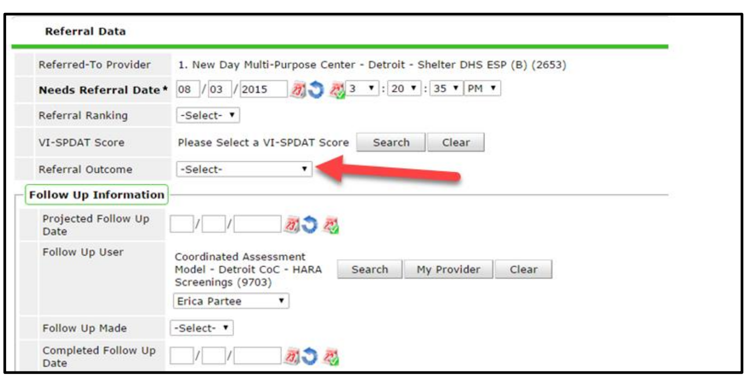
1. Click on the **Reports** tab
2. Click **Referrals** report
3. Make sure the **correct Provider** is selected
4. **Referral Type = Incoming Referrals**
5. **Referral Status = All**
6. **Referral Outcome = All**
7. Enter **Referral Date Range** (NOTE: start date should be 1 day before first referral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

Option #1 – Mass Referral Outcome Update

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 will be receiving a hotel/motel voucher
    b. **Declined**: if client refuses
    c. **Canceled**: if unable to contact client

Option #2 – Update Referral Outcomes in Individual Client Records

1. **Click** on the **client's name** in the Referral Results **to link to the client's HMIS record**
2. Click the **Service Transactions tab**
3. Click **View Entire Service History**
4. Click on **Referrals**
5. Click the **Edit pencil next to the referral** and the following window will be displayed



6. Select the appropriate **Referral Outcome** from the dropdown list
    a. **Accepted**: if client will be receiving a hotel/motel voucher
    b. **Declined**: if client refuses
    c. **Canceled**: if unable to contact client
7. Click **Save & Exit**