STREET OUTREACH 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 Job Aid – HMIS Process for Street Outreach.

- Create HMIS Record (at point of initial contact or once the client's full name and DOB is known)
  - ✓ EDA into your Street Outreach bin
  - ✓ Backdate, if necessary
  - ✓ Search/Add client
  - ✓ Create/Edit Household (if applicable)
  - ✓ Add Electronic ROI (Release of Information)
    - If the client has not granted permission to share data at the point of initial contact, an electronic ROI MUST be added <u>AS SOON AS</u> verbal/written permission has been obtained. The ROI must be backdated to the date of initial contact in order data to share properly.
  - ✓ Record (HUD) Project Entry = Same day as initial contact
  - ✓ Record all known data elements at project entry (on MSHMIS Street & Shelter Intake Assessment) including the Current Living Situation
  - ✓ Create Case Plan/Standard Street Outreach Goal and Document Case Notes
    - Goal Classification: ESG
    - Goal Type: Discharge to Permanent Housing (initial ES & SO goal)
    - Status: In Progress
    - Record Case Note
  - ✓ Record applicable Service Transactions (OPTIONAL)

- Update HMIS Record as a Relationship Develops and Information is Obtained
  - ✓ Continue to complete the MSHMIS Street & Shelter Intake Assessment as information becomes available (update this information on the project entry as it would have been true at project start).
  - ✓ Record new Current Living Situation records at each contact (must be done via an Interim Review)
  - ✓ Document ongoing case notes (on the Street Outreach Goal, located under the Case Plans tab)
  - ✓ Record Current Living Situation and Date of Engagement – if and when the client becomes Engaged. (must be done via an Interim Review) NOTE: *All data elements MUST be completed for clients that become Engaged*
  - ✓ Record additional services provided (OPTIONAL)

- Exit Client from Project
  - ✓ Update Overall Status of the Street Outreach Goal
    - Service Complete -OR- Closed (if client is exited due to inactivity)
  - ✓ Record Project Exit Date = Date client is no longer receiving outreach services
    - Staff should monitor un-exited clients. <u>Clients who have not had contact with outreach staff in 90 days should be closed out with an exit date that reflects that last date of contact.</u>
    - Staff should make at least three documented attempts to contact clients who are scheduled for case closure due to inactivity prior to closing the case in HMIS. Contacts should be made using a combination of methods (i.e., calling emergency contacts, visiting last known location, etc.)
  - ✓ Document Reason for Leaving and Destination
  - ✓ Update any data elements that changed since entry or last interim review (if applicable)
    - Record new Current Living Situation Record

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