HUD Rapid Re-housing HMIS workflow

**Coordinated Entry**

Identify clients your program is matched with on the coordinated entry list

Record Contacts:

* Set Enter Data As provider to **Coordinated Entry NY-505**
* Navigate to the client’s profile in Clientpoint
* Add an interim review for that client’s Entry/Exit in the **Coordinated Entry NY-505** provider
* Add information to the Housing Provider Contacts section
	+ Record the date and type of contact

**Opening Clients**

* Confirm that client profile information and household makeup information are correct in Servicepoint
	+ If client is entering project from a DV shelter,
		- Create client record in Clientpoint,
		- Create household and client records for each member of the household
* Add Electronic ROI to the ROI tab in Clientpoint
* Create Entry/Exit record in Clientpoint
	+ Check that all responses are accurate at the time of entry into RRH, especially
		- Prior Living Situation
		- History of Homelessness (# of times literally homeless in the last 3 years, # of months homeless in the past 3 years, Approximate Date Homelessness Started)
		- Income
		- Non-Cash Benefits
		- Health Insurance
		- Disabilities
		- Domestic Violence
	+ Make sure to check that HUD verifications are complete and that all records are current (Green check-box)
* Add assessment information for all other family members in Clientpoint by selecting their names on the Entry/Exit tab
	+ All assessment information is required for minor children except for income
* Add opening case notes, measurements, and service transactions as required by your agency

**Updating client information – Move-in and Annual Assessment**

Move-in

* + 1. When client obtains permanent housing, add an interim assessment on the date of that they moved in.
		2. Fill in the Housing move-in date field with the date they moved in
		3. Exit client from the **Coordinated Entry NY-505 Provider** with the destination “Rental by client, RRH or equivalent subsidy” when they move into a housing unit

Annual Assessment

1. If the client has been enrolled in the program for 1 year, create an interim assessment within 30 days of their anniversary date in the program
2. Update the client’s income, non-cash benefit, and health insurance information with any changes that have occurred in the past year

Other updates

1. Depending on your agency policy, you may have to record service transactions whenever case management services are provided
2. Depending on your agency policy, you may have to record measurements (e.g., Self-Sufficiency Outcome Matrix) at regular intervals

**Checking client out**

1. When the client is no longer receiving a rental subsidy or case management services, add an exit date to the client’s entry/exit record
2. Select the Reason for Leaving and Destination
3. Update client’s income, non-cash benefit, and health insurance information with any changes that have occurred in the past year