Basic Street Outreach HMIS Workflow

**Opening Clients**

* Search for client in HMIS database
  + If no client is present with that name or SSN, create a new client record with as much detailed information as possible
  + Incomplete client records are OK for street outreach clients if you were unable to collect complete information about them.
  + Add additional family members to the household if applicable
* Add Electronic ROI to the ROI tab in Clientpoint if ROI was obtained
  + If you obtain an ROI after opening the client in the Street Outreach project, backdate the ROI to the date they were opened in the project
* Create an Entry/Exit record in Clientpoint
  + The opening date for your project is the first time they had contact with the Street Outreach project
  + Enter all available information
    - Demographic information (DOB, Race, Ethnicity, Household Composition)
    - 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 (view old records for accuracy)
    - Non-Cash Benefits
    - Health Insurance
    - Disabilities
    - Domestic Violence
    - Initial Contact under “Current Living Situation” sub-assessment
  + 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 entry/exit screen if applicable

**While the client is open:**

* Add an interim assessment to record each contact with the client
  + Add a record of the contact in the “Current Living Situation” sub-assessment.
* If client decides to “engage” with the outreach program and provides more information about their situation
  + Complete the intake assessment by editing their Entry/Exit Record
  + Add an interim assessment on their “date of engagement” and fill in the date of engagement.
  + NOTE: Data quality is only measured for clients with a date of engagement.
* Add opening case notes, measurements, and service transactions as required by your agency
* City of Syracuse ESG Street Outreach projects must record all contacts as service transactions

**Checking client out**

* When the client moves to shelter or a permanent housing situation, exit them from the street outreach program with the appropriate destination.
  + Positive outcomes for street outreach programs are Temporary or Permanent destinations listed in the destination menu.
* Update client’s income, non-cash benefit, and health insurance information with any changes that have occurred since they were opened with your project

**Coordinated Entry Assessment**

* When you have discussed referring them for permanent housing services and assessed the client using the VI-SPDAT, use the following steps to enter their information into the coordinated entry system:
* Set Enter Data As provider to **Coordinated Entry NY-505**
* Navigate to the client’s profile in Clientpoint
* Add an Entry/Exit record for that client in the **Coordinated Entry NY-505** provider
* Fil out the **Coordinated Entry NY-505** provider assessment
  + Fill out the referral and prioritization section
  + Fill out the appropriate VI-SPDAT form
* Update each client’s Coordinated Entry assessment once a month, with particular attention to:
  + Months homeless in the last 3 years
  + Housing program preferences (PSH vs RRH)
* Close out client’s Coordinated Entry Assessment
  + If you have had no contact with the client for 90 days or more
  + If you know that the client is in a housing situation or is no longer in urgent need of permanent housing