HUD Homelessness Prevention HMIS workflow

**Opening Clients**

* Confirm that client profile information and household makeup information are correct in Servicepoint
  + If client does not have a record in HMIS
    - Create a client record in Clientpoint
    - Create a household record and client records for each member of the household
* Add Electronic ROI to the ROI tab in Clientpoint
* Create an Entry/Exit record in Clientpoint and link all members of the household
  + Answer all applicable questions in the entry assessment
  + Check that all responses are accurate at the time of entry, 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
  + 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

* + - If the client moves to a new location, add an interim assessment on the date of that they moved in.
    - Fill in the Housing move-in date field with the date they moved in

3-month Updates

* If the client has been enrolled in the program for 3 months, create an interim assessment
* Update the client’s income, non-cash benefit, and health insurance information with any changes that have occurred in the past 3 months

Other updates

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

**Checking client out**

* When the client is no longer receiving financial assistance or case management services, add an exit date to the client’s entry/exit record
* Select the Reason for Leaving and Destination
* Update client’s income, non-cash benefit, and health insurance information with any changes that have occurred in the past year
* Fill out the “Housing Assessment At Exit” fields.