HUD Permanent Supportive Housing

HMIS Workflow Document

**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
* Exit Client from the Coordinated Entry NY-505 provider when they move into the permanent supportive housing unit

**Opening Clients**

* Find a spot on the Shelterpoint bedlist for the client.
* 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 for the project the client is entering to the ROI section of the Shelterpoint intake
* Review the intake assessment in Shelterpoint
	+ Check that all responses are accurate at the time of entry into PSH, 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
			* End any active income records with a date 1 day prior to the client’s entry date into the program if they are incorrect. Add the new correct records to the client’s income table.
		- Non-Cash Benefits
		- Health Insurance
		- Disabilities
		- Domestic Violence
		- Confirm that the Housing Move-in Date is the date they moved in to the unit
	+ 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 Shelterpoint
* Add opening case notes, measurements, and service transactions as required by your agency

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

Annual Assessment

* 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
* Update the client’s income, non-cash benefit, and health insurance information with any changes that have occurred in the past year
	+ Any and all changes in income should be recorded, even small cost-of-living adjustments to social security income.
* Renew the client’s Release of Information Once a year at the same time you do the annual assessment

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 case notes at regular intervals
* 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 discharged from the program, exit them from their bed in Shelterpoint by selecting “View All”, and selecting the bed with the red minus sign on the left hand side of the table.
* Select the Reason for Leaving and Destination
* Update client’s income, non-cash benefit, and health insurance information with any changes that have occurred since the last interim assessment.