# HMIS Client File Checklist

| Intake | Face Sheet: Household | Services: Contact Log | Discharge |
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## ☐ 1. Intake

From the **Opening Menu**, Click **Client Lookup**
**Enter Client Name**, Click **Search**
If the client is in the system, note the client's first and last name, and SSN
If you do not see the client, try entering only part of the client's name
Click **Opening Menu**
Select **"Your Program"**
Enter the client's first and last name, and SSN
Click **Search / Create**
Click **"Create New Application"**
**Enter** Data into Intake; All fields with a red asterisk must be answered
Click **Admission**
**Enter Client Consent Form Data**
Click **"Household and Child Info"** at the top of the page to go the Face Sheet **or**
Click **Opening Menu when Finished**

If the Client is in the system, you can copy their file by entering the Name and SSN exactly how it is in the system.

## ☐ 2. Face Sheet: Household Child Info

To enter into the face sheet, take any of the following steps:
1. **From the Intake**, click **"Household and Child Info"**
2. **From the Opening Menu**, Select **Profile**, Select **"Your Program"**
And Click **Face Sheet**

Click **Household and Child Info** from the top of the face sheet
**Enter Household Member Data**
Click **Save**
Enter additional information in the Face Sheet as desired
Click **Opening Menu When Finished**

When you click Save, you will go to the middle of the Face sheet, instead of the top.

## ☐ 3. Services: Contact Log

(Required for APRs)
From the **Opening Menu**, Select **Service**
Select **"Your Program"** from the dropdown
Click **Contact Log**
Select **"Your Client",** Click **Continue**
Click **Continue** to Add a New Session
**Enter Contact Details:** Contact Duration, Time of Contact, Location, and Primary Problem Area
**Enter Services Provided:** Check the Services Provided, Enter the Number of Units, and Note any details as desired
**Enter Progress Notes as Desired**
Click **Continue**
Click **Opening Menu When Finished**

## ☐ 4. Discharge

From the **Opening Menu**, Click **Discharge**
Select **"Your Program"**, Click **Process Discharge**
Select **"Current Program Roster**" and Click **Continue**
Select **"Your Client"**
Select "**Discharge from AWARDS Agency Housing"**
Click **Continue**
**Enter Discharge Data**, Click **Apply**
Review Data, Click **Opening Menu When Finished**