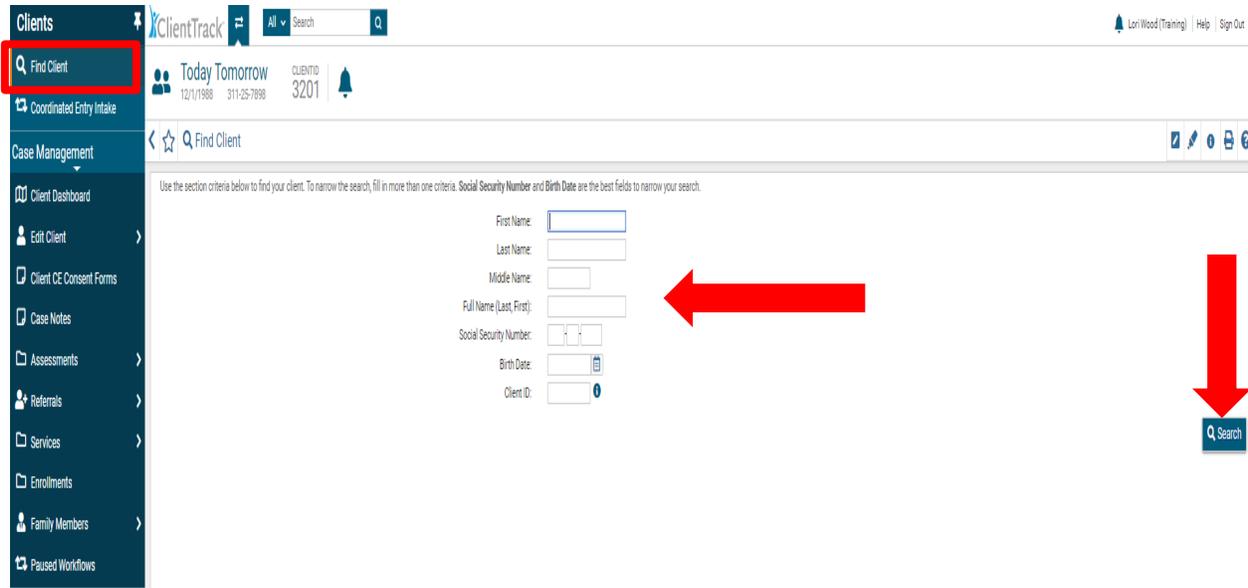


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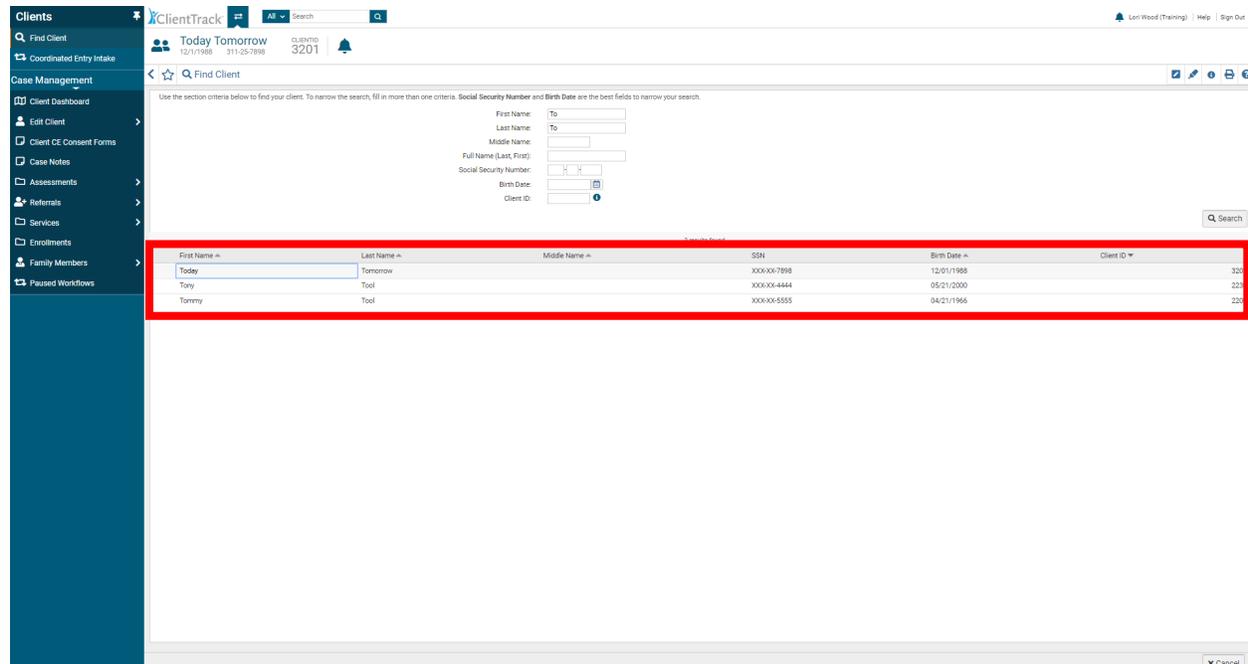
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Log in using the “2020 Coordinated Entry” workgroup and the “Coordinated Entry Region #” for your Region as the organization.

1. On the “Clients” workspace, click on “Find Client” located in the menu on the left-hand side of the screen. Enter the first two letters of the Client’s first name in the “First Name” box then enter the first two letters of the Client’s last name in the “Last Name” box then click “Search”. **You can also search by SSN, DOB or the Client ID#.**



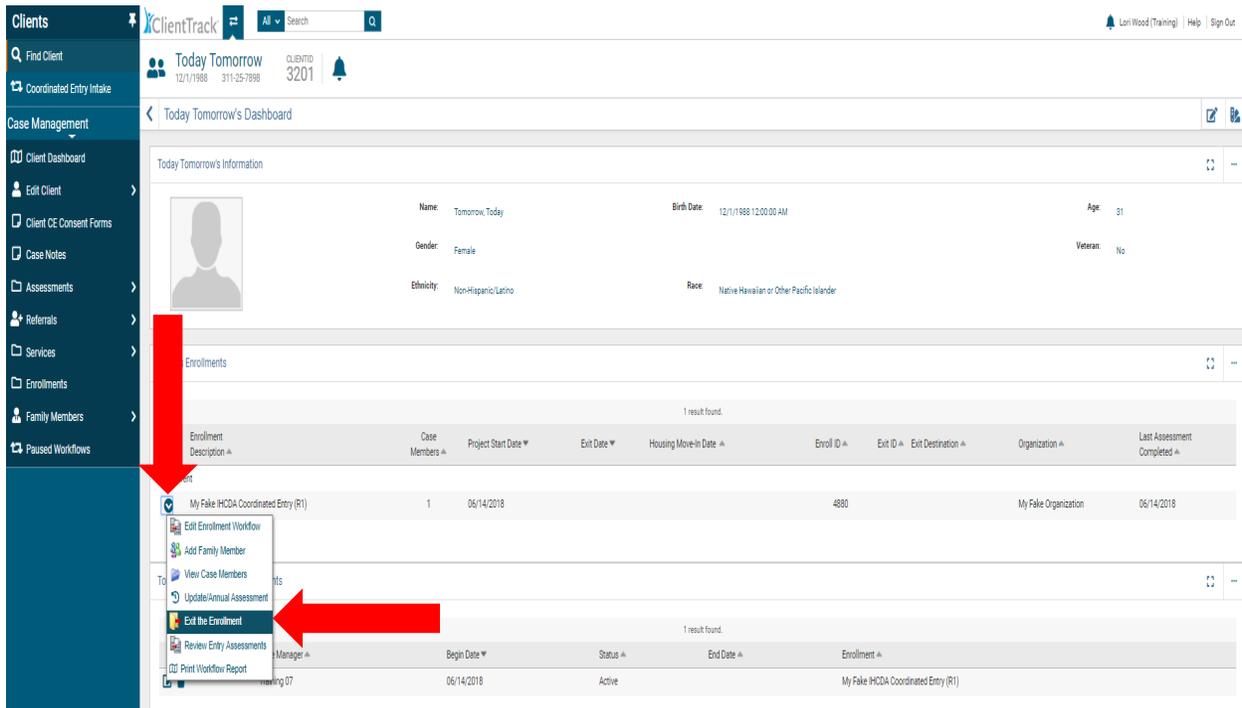
2. Select the Client from the search list. If you searched by Client ID#, the system will take you directly to the Client Dashboard.



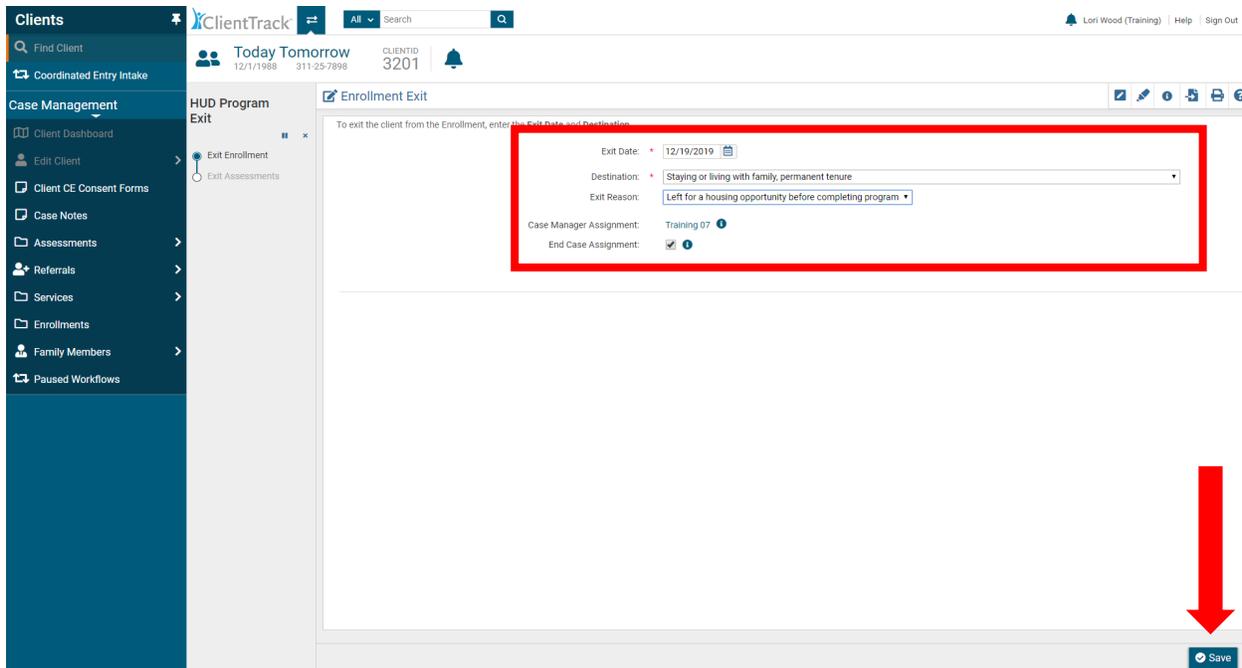
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- From the **“Client Dashboard”**, click on the blue button to the left of the Client’s **“Coordinated Entry”** enrollment. Next, click **“Exit the Enrollment”** option to launch the **“Exit”** workflow.



- The **“Exit Date”** is prefilled with the current date. To change the date, enter the correct date in the text box.
- Next, click on the **“Destination”** drop down arrow and select the Client’s destination. **“Exit Reason”** is not a required field, however, please complete if possible. Click the **“End Case Assignment”** button, then click **“Save”** in the bottom right-hand corner.



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PLEASE NOTE: When choosing the EXIT Destination, it is important to choose the housing type the Client is moving to. Pay special attention to whether it is **“Temporary Tenure”** or **“Permanent Tenure”** when Client is moving in with Family or Friends. This will affect **“Positive Housing Outcomes”** for reporting. **“Temporary Tenure”** is a Negative Outcome and **“Permanent Tenure”** is a Positive Outcome.

6. Complete the **“Universal Data Assessment”**, (for the **“Health Insurance”** portion, if the Client’s information has not changed since their most recent assessment, click on **“Default Last Insurance Status”** and the previous assessment information will prefill. Next, click **“Save”** in the bottom right corner of the screen.

The screenshot shows the ClientTrack interface for the HUD Program Exit. The main content area is titled "Universal Data Assessment" and contains a form for entering client information. A note at the top explains that the "Default Last Assessment" button will not bring in 3.917 data due to real-time data entry. The form fields are: Assessment Date (12/19/2019), Age at Assessment (31), Assessment Type (Exit), Assessor (Lori Wood), and Program (My Fake IHCD Coordinated Entry (R1)). Below these fields is the "Health Insurance" section, which includes a "Default Last Insurance Status" button highlighted with a red arrow. The "Covered by Health Insurance" dropdown is currently set to "--SELECT--". At the bottom, there is a table for recording health insurance sources.

Type	Status	Reason No	Other Coverage
Private	--SELECT--	--SELECT--	
Private - Employer	--SELECT--	--SELECT--	

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The screenshot shows the 'Universal Data Assessment' form for 'Health Insurance'. At the top, it says 'Please indicate whether or not the client is covered by health insurance. If so, you will be able to record health insurance sources for the client.' Below this is a 'Default Last Insurance Status' dropdown menu. Underneath is a 'Covered by Health Insurance' dropdown menu. The main part of the form is a table with columns: Type, Status, Reason No, and Other Coverage. The table lists various insurance types such as Private, Medicare, Medicaid, etc., each with corresponding dropdown menus for status and reason. At the bottom right, there is a red arrow pointing to a 'Save' button.

Type	Status	Reason No	Other Coverage
Private	-- SELECT --	-- SELECT --	
Private - Employer	-- SELECT --	-- SELECT --	
Private - Individual	-- SELECT --	-- SELECT --	
Medicare	-- SELECT --	-- SELECT --	
Medicaid	-- SELECT --	-- SELECT --	
State Children's Health Insurance Program S-CHIP	-- SELECT --	-- SELECT --	
Military Insurance	-- SELECT --	-- SELECT --	
Other Public	-- SELECT --	-- SELECT --	
State Funded	-- SELECT --	-- SELECT --	
Combined Children's Health Insurance / Medicaid Program	-- SELECT --	-- SELECT --	
Indian Health Service (IHS)	-- SELECT --	-- SELECT --	
Other	-- SELECT --	-- SELECT --	
Health Insurance obtained through COBRA	-- SELECT --	-- SELECT --	

7. **Income and Sources, Non-Cash Benefits:** If the Client's information has not changed since their most recent income assessment, click on "Default Last Assessment" and the previous assessment information will prefill. Otherwise, complete the information by clicking on the drop-down boxes

The screenshot shows the 'Income and Sources, Non-Cash Benefits' form. It includes instructions for recording income and non-cash benefits. A red box highlights the 'Default Last Assessment' button. Below this, there are dropdown menus for 'Assessment Date' (pre-filled with 12/19/2019), 'Income from Any Source', 'Non-Cash Benefits from Any Source', and 'Expenses'. A red arrow points to the 'Non-Cash Benefits from Any Source' dropdown. At the bottom right, there are 'Save and Close' and 'Skip' buttons.

Assessment Date: 12/19/2019

Income from Any Source: -- SELECT --

Non-Cash Benefits from Any Source: -- SELECT --

Expenses: -- SELECT --

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8. If the Client answered “Yes” to “Income from any Source” and/or “Non-Cash Benefits from any Source”, a corresponding source must be entered.

Income and Sources, Non-Cash Benefits

Income

Type	Description	Monthly Amount	Restriction
<input type="checkbox"/> Earned Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> Self Employment	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> Worker's Compensation	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> Unemployment Insurance	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> Other Pension	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input checked="" type="checkbox"/> Supplemental Security Income	<input type="text"/>	\$795.00	Restrict to MOU/InfoRelease
<input type="checkbox"/> Social Security Disability Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> Retirement (Social Security)	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> Veteran's Pension	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> Veteran's Disability Payment	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> TANF	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> Child Support	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> Other Income	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease

Non-Cash Benefits

Type	Description	Monthly Amount	Restriction
<input checked="" type="checkbox"/> Food Stamps/Money for food on benefits card	<input type="text"/>	\$89.00	Restrict to MOU/InfoRelease
<input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants, and Children	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> TANF Child Care Services	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> TANF Transportation Services	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> Other TANF-funded Services	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease
<input type="checkbox"/> Other Source	<input type="text"/>	<input type="text"/>	Restrict to MOU/InfoRelease

Count/Total Monthly income: 1 \$89.00

Restriction: Restrict to Organization Restrict to MOU/InfoRelease

9. Click “Save and Close”.

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- 10. **Quick Referral:** Complete the “Enrollment” box by choosing the “Coordinated Entry” option.
- 11. If referring a Client to another Provider, complete the “Service”, “Refer to Provider” and “Restriction” fields. Next, click “Save and Close” located in the bottom right corner.

Quick Referrals

Use this form to identify multiple referrals for a client, quickly. Change the Referral Screen to filter pre-defined referrals available. To add additional referrals that are not listed, add new rows to the bottom of the form. Choose a service that the client needs and the list of providers will show all providers that provide that service.

Referral Date: * 12/19/2019

Enrollment: * 06/14/2018 - 12/19/2019 - My Fake IHCD Coordinated Entry (R1)

Referring Provider Name: My Fake Organization

Referring User: Lori Wood

Search

No records found (42)

Service	Refer to Provider	Result	Result Date	Restriction
<input checked="" type="checkbox"/> CE - Case Management	AA Find	--SELECT--		Restrict to MOU/InfoRelease
<input type="checkbox"/> --SELECT--		--SELECT--		--SELECT--

Save Save & Close Skip

- 12. **Housing Assessment:** Complete the “Housing Assessment Disposition” by clicking on the drop-down menu and then clicking on the appropriate answer. Next, click “Save” in the bottom right corner.

Housing Assessment

Use this form to collect the client's housing assessment disposition. HUD provides the following explanation of this data element in the HMIS Data Manual: To track client disposition following a brief assessment of critical housing needs. This data element may be used as part of a coordinated assessment system. The disposition response categories represent the different types of continuum projects or other community assistance to which a client may be referred upon presenting to a coordinated assessment project or related point of contact with a request for assistance to address a housing crisis.

Assessment Active

Assessment Date: * 12/19/2019

Housing Assessment Disposition: * Applicant terminated assessment prior to completion

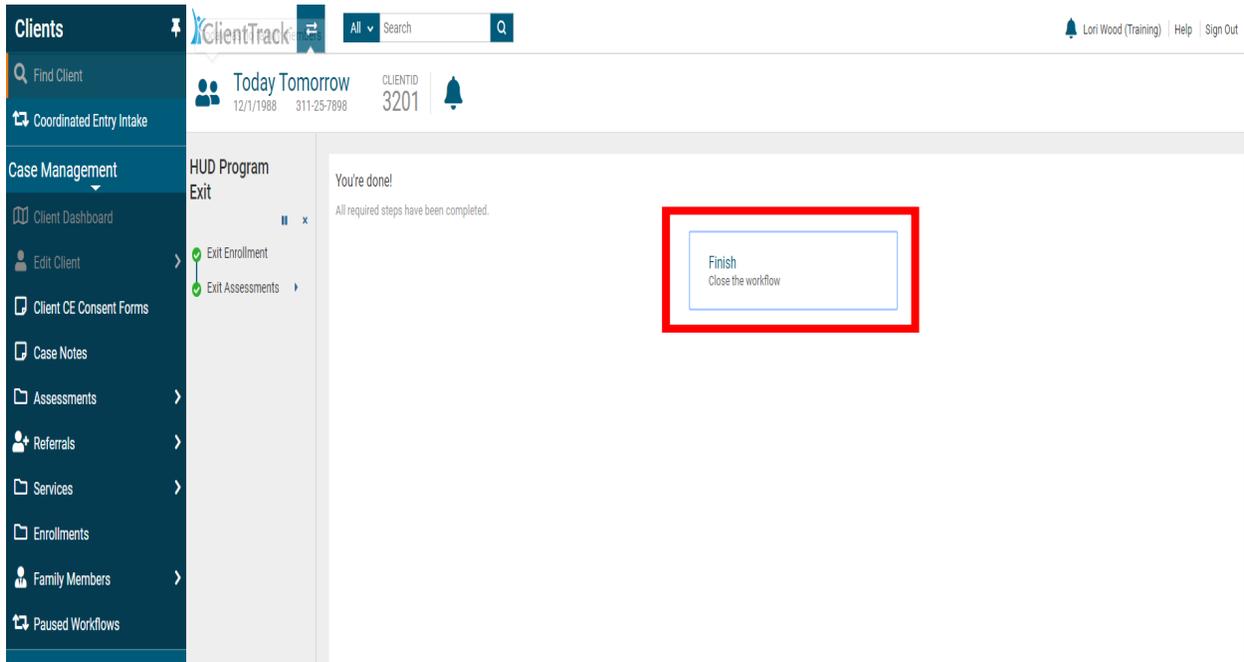
Restriction: *
 Restrict to Organization
 Restrict to MOU/InfoRelease

Save

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13. To complete the “Exit” workflow, click “Finish”.



Please contact the HMIS Help Desk at: HMISHelpDesk@ihcda.in.gov with additional questions.