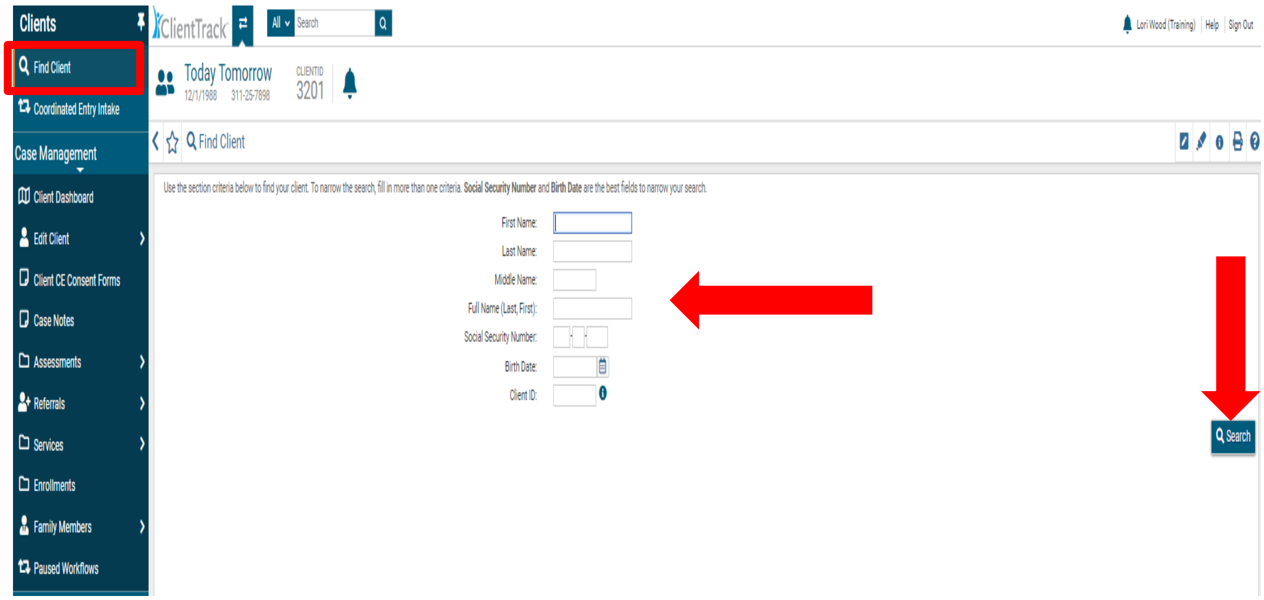
[How to Guide: HMIS Coordinated Entry Exit]

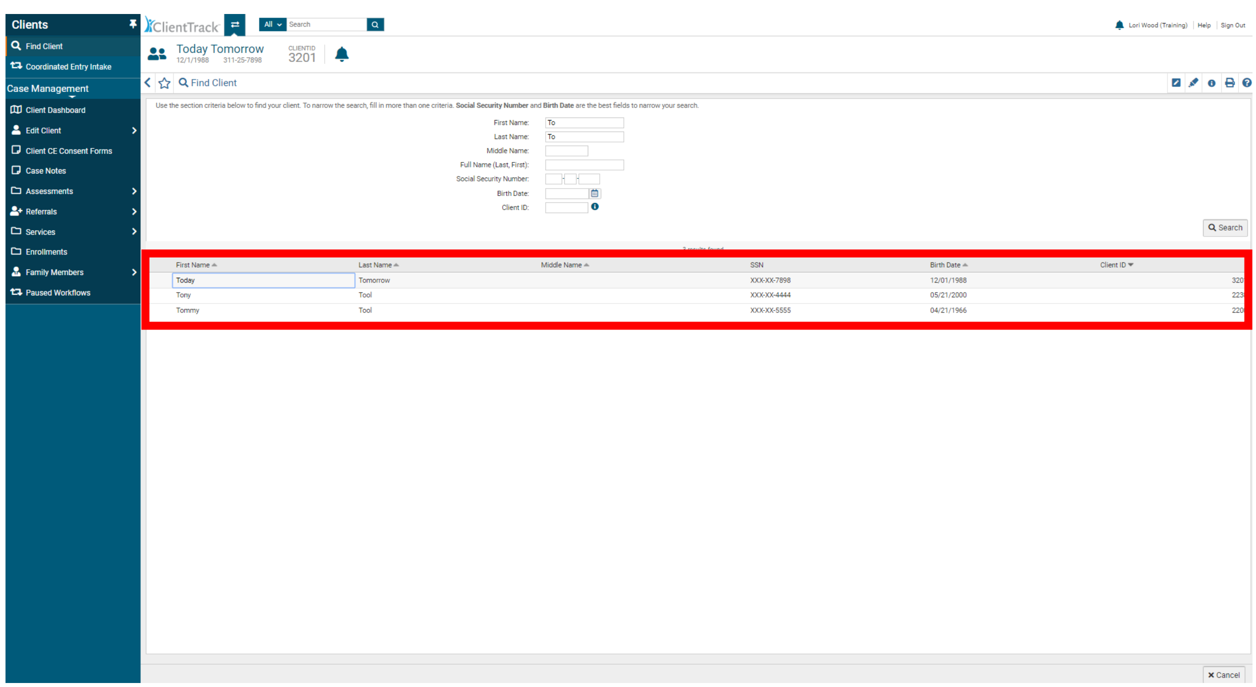
December 2019

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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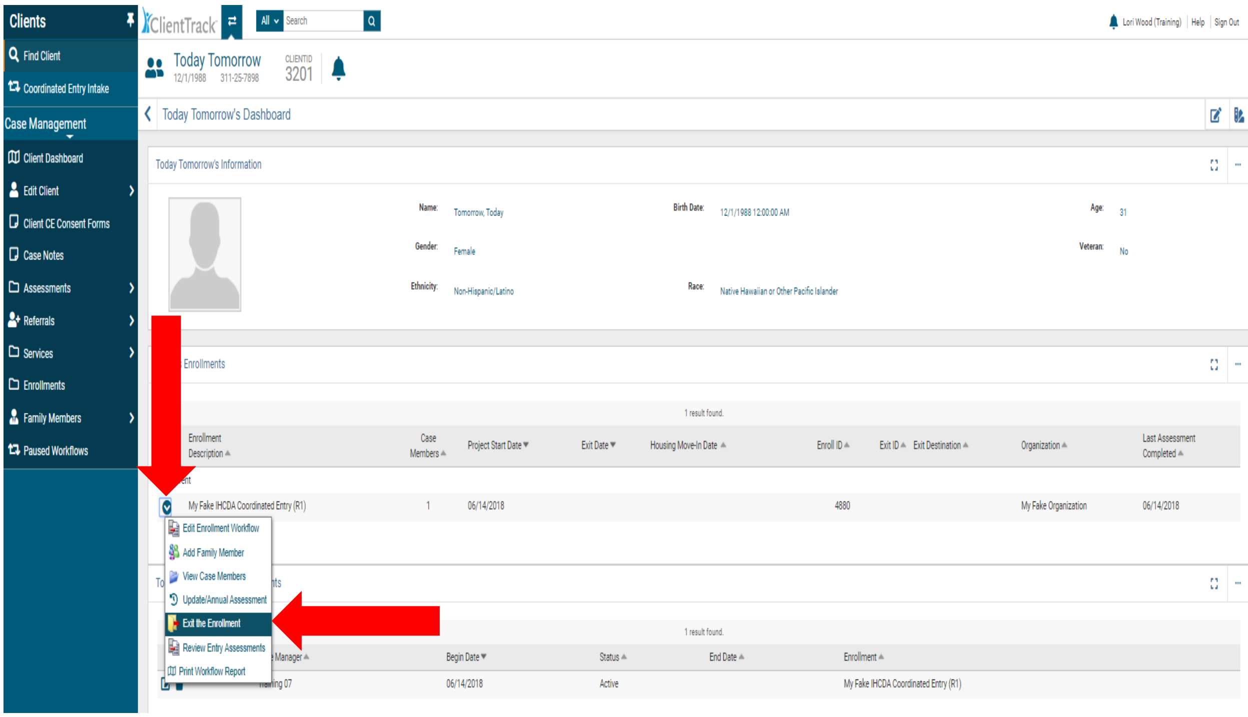
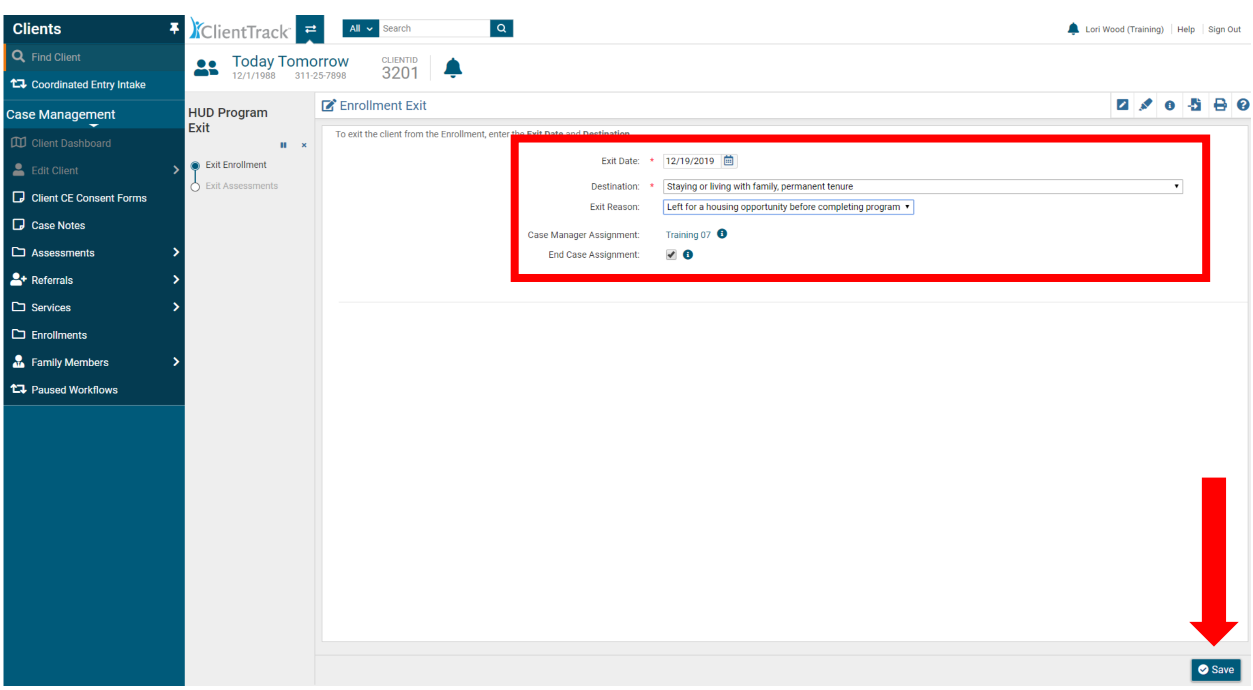
3. From the **"Client Dashboard"**, click on the blue button to the left of the Client's **"Coordinated Entry"** enrollment. Next, click **"Exit the Enrollment"** option to launch the **"Exit"** workflow.

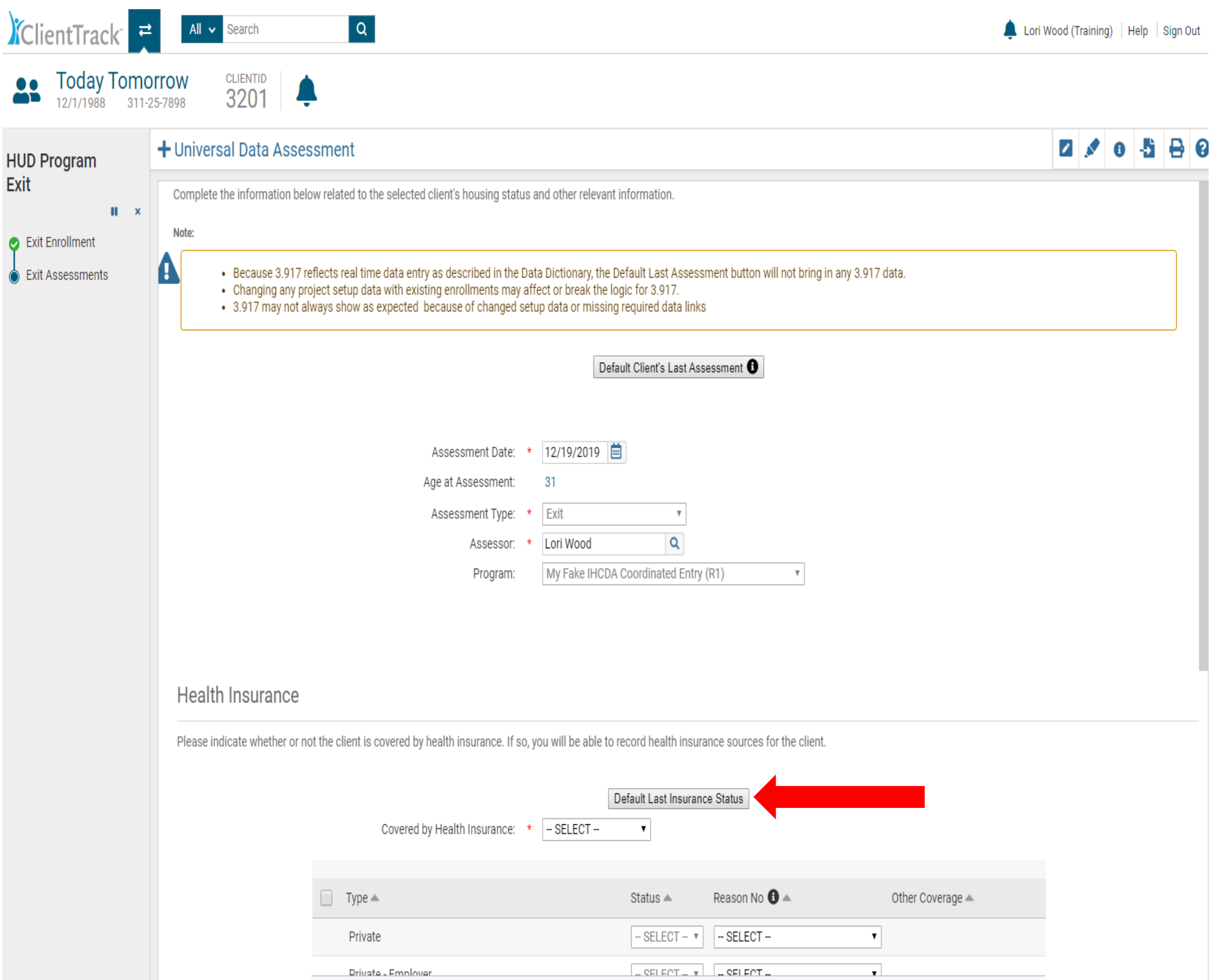


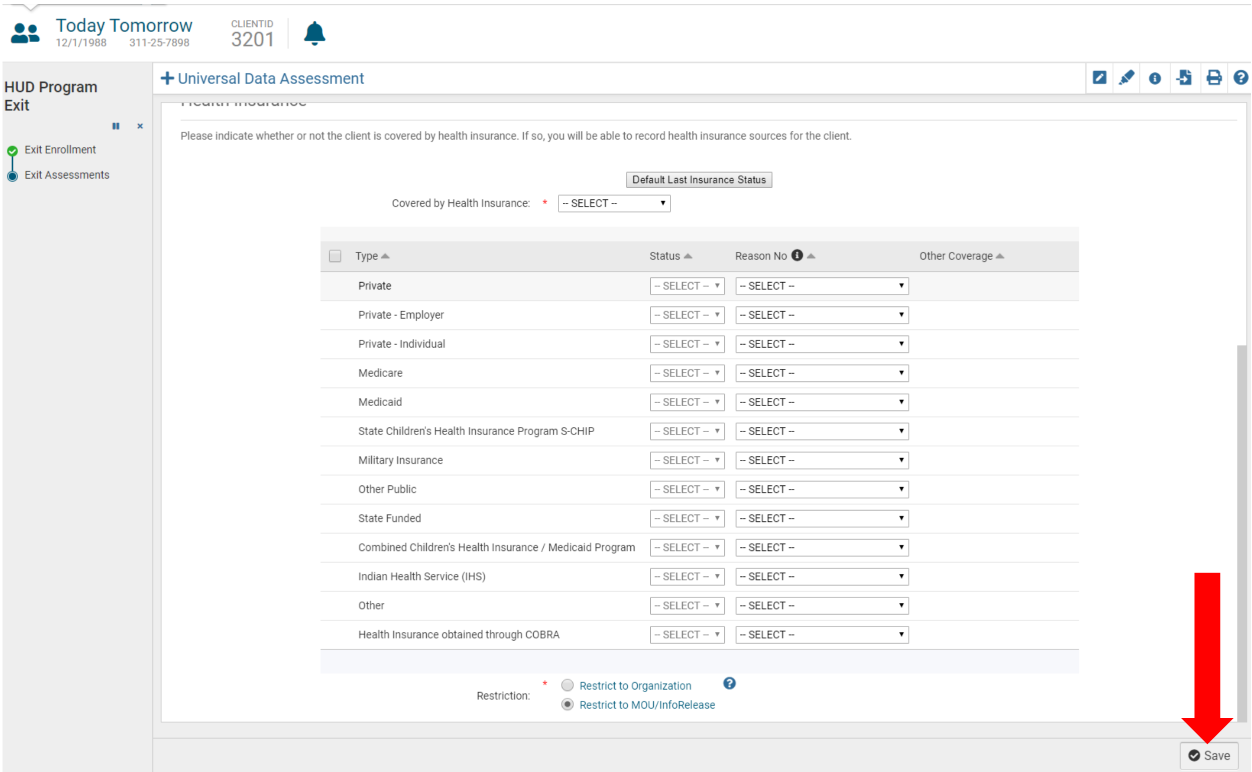
4. The **"Exit Date"** is prefilled with the current date. To change the date, enter the correct date in the text box.
5. Next, click on the **"Destination"** drop down arrow and select the Client's destination. **"Exit Reason"** is not a required field, however, please complete if possible. Click the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



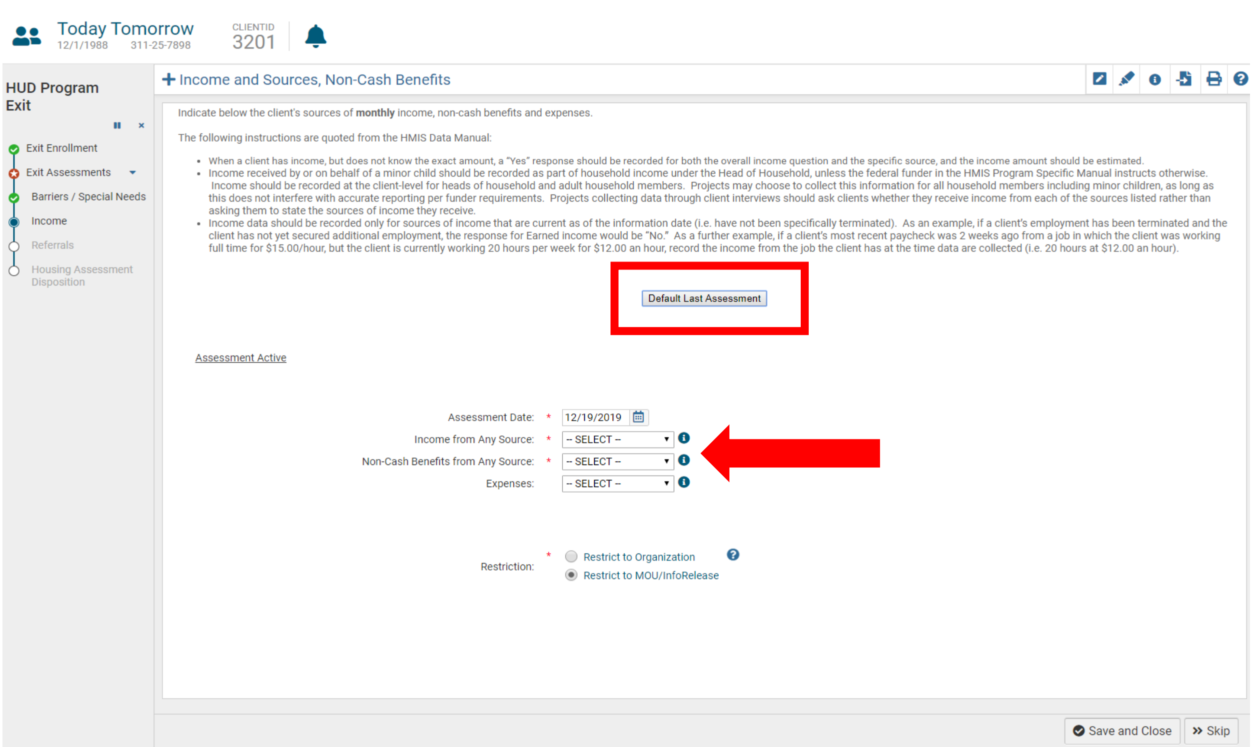
PLEASE NOTE: When choosing the EXIT Destination, it is important to choose the housing type the Client is moving to. Pay special attention to whether it is **"Temporary Tenure"** or **"Permanent Tenure"** when Client is moving in with Family or Friends. This will affect "Positive Housing Outcomes" for 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, **c**lick **"Save"** in the bottom right corner of the screen.

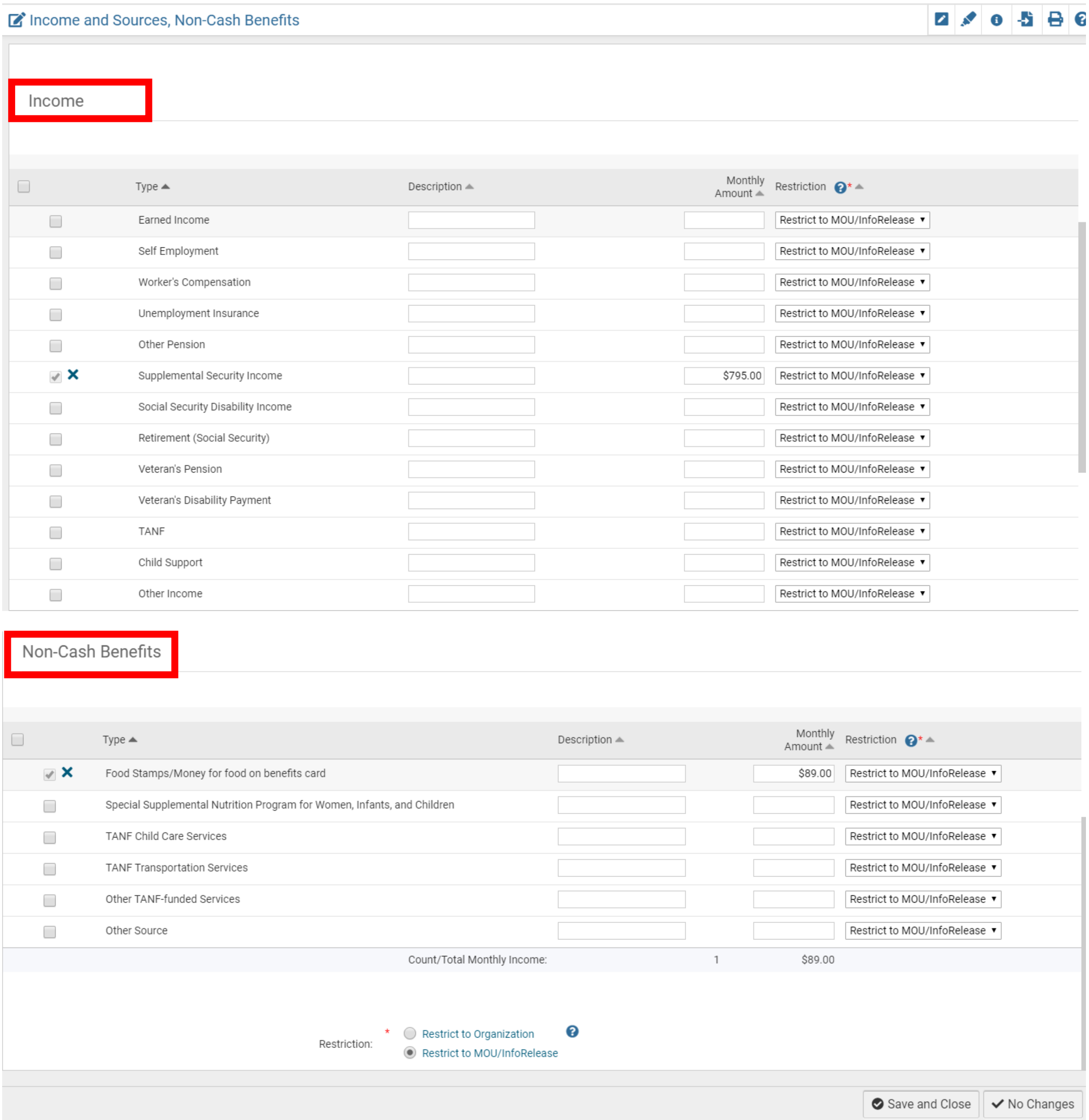




7. **Income and Sources, Non-Cash Benefits**: If the Client's information has not changed since their most recent income assessment, click on **"Default Last Assessment"** and the previous assessment information will prefill. Otherwise, complete the information by clicking on the drop-down boxes

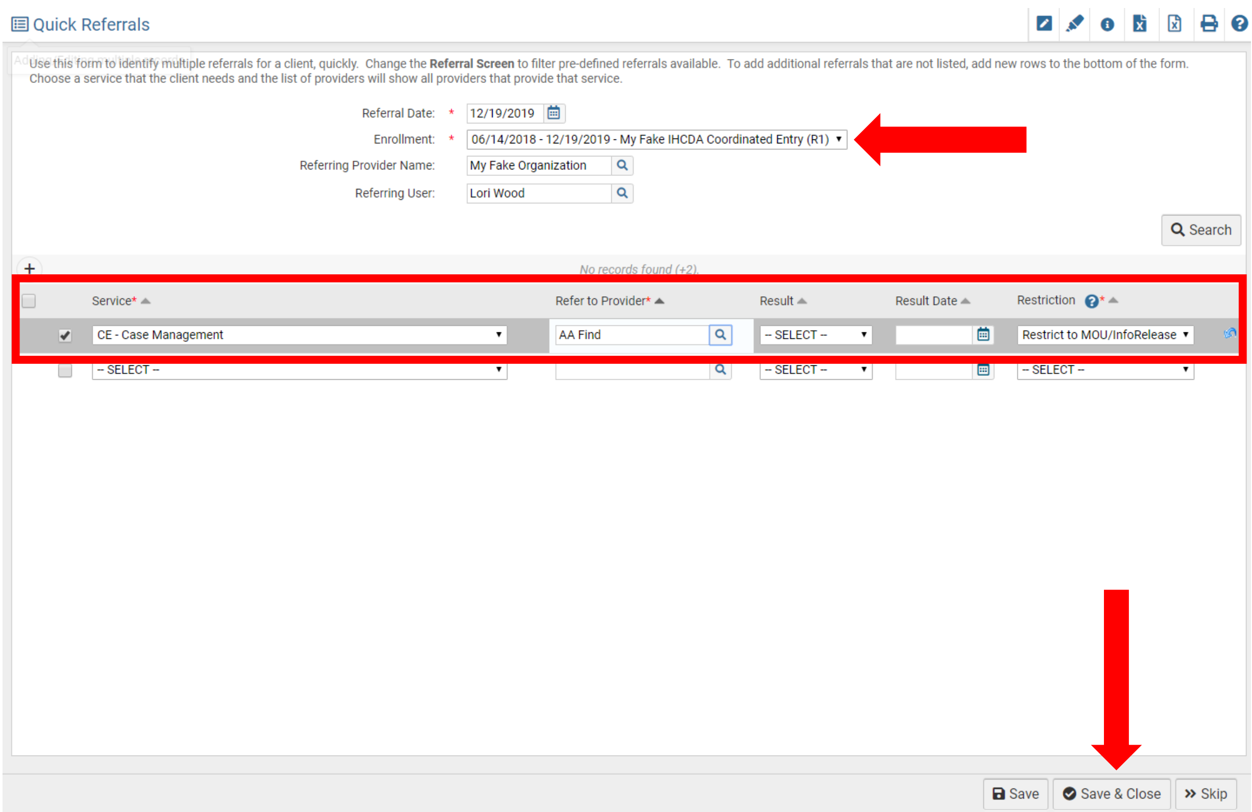


8. If the Client answered **"Yes"** to **"Income from any Source"** and/or **"Non-Cash Benefits from any Source"**, a corresponding source must be entered.

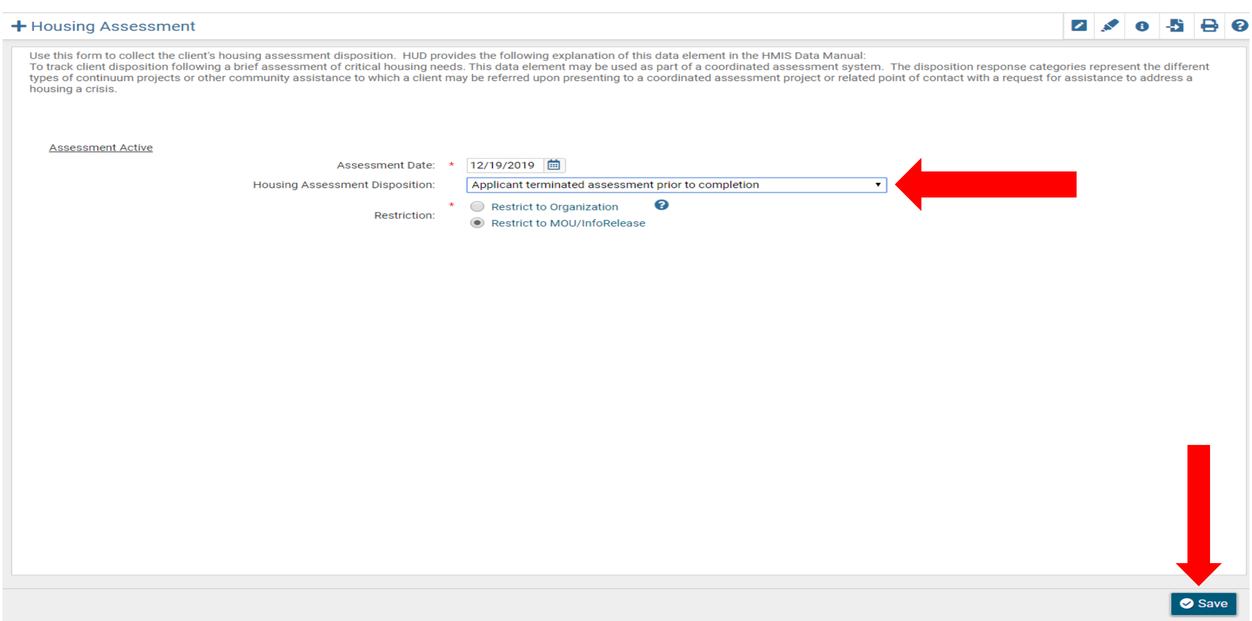


9. Click "Save and Close".

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.



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.



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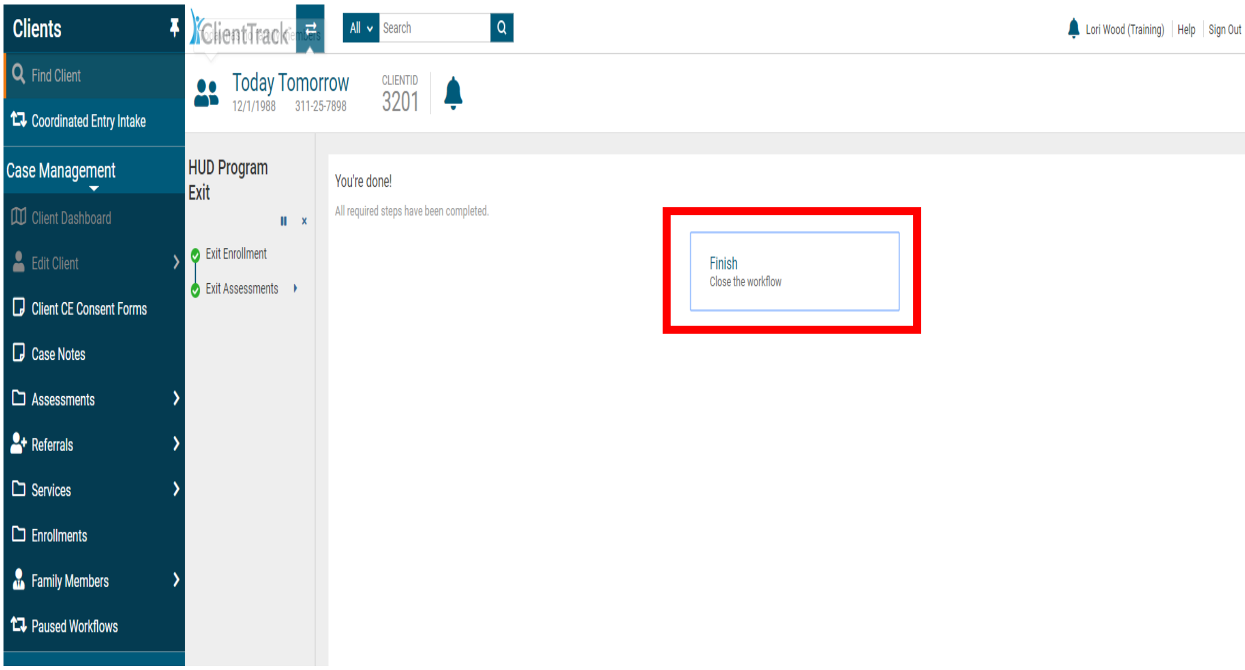
13. To complete the **"Exit"** workflow, click **"Finish"**.



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