

Standard Data Entry Workflow SP5.12


This document provides the standard Entry/Exit workflow as used by the DuPage County CoC Homeless Management Information System participants.

Prior to completing client level data entry

- Discuss your agency's Privacy Notice with the client and ensure proper understanding.
- If your program shares client data, with their consent, that is not covered by the Privacy Notice, use the **Enter Data As** (EDA) function and select the correct provider.
- **Back Date** mode is not required with this workflow.

ClientPoint

Client Search

 Please Search the System before adding a New Client.

	First	Middle	Last	Suffix
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Alias	<input type="text"/>			
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>			
Social Security Number Data Quality	<input type="text" value="-Select-"/>			
Exact Match	<input type="checkbox"/>			

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Search for the client in **ClientPoint**, reviewing all search results for identifying information that matches that of the client's. If no match is found, proceed to *Add New Client With This Information*.



If the client has signed the *Client Data Sharing Refusal Form*, then lock the record now, or contact your Agency Data Administrator or the HMIS Help Desk, HMIS@dupageco.org, for further assistance. See *Adjusting Visibility Addendum*.

Tip: To obtain the most accurate search results, use a partial first and partial last name.

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Client Profile

Client Information				Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments



Add the verified legal name, social security number (SSN), SSN data quality, and U.S. Military Veteran details for the client. If the client goes by another name other than the legal name, enter it into the Alias field.



The additional client demographic fields may also be completed at this time.

Household

Client Information				Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments

Create / update the household data ***Household Type, Household Members, and Relationship to Head of Household (HOH)***.

Everyone must be assigned a household, and each household must have a Head of Household. See *Household Addendum*.



Add Social Security Number (SSN) and U.S. Veteran data for all members.



If the client has signed the *Client Data Sharing Refusal Form*, then lock the household member's record now, or contact your Agency Data Administrator or the HMIS Help Desk, HMIS@dupageco.org, for further assistance. See *Adjusting Visibility Addendum*.

Previous Households

Search Existing Households Start New Household

(35872) Single Male

Name

(140274) Sosa, Sammy

(169047) Test, Just A

Manage Household

Release of Information (Optional)

Client Information				Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments

Start Date ≤ Program Entry Date

End Date = 3 years from the Start Date, or as otherwise stated in the signed statement and/or Agency Privacy Notice.

Add a **Release of Information (ROI)** for the agency, including all household members.

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Program Entry

Client Information				Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments

Add a Program Entry through the **Entry/Exit** tab, including all household members, completing all program required assessments for each HH member.

<input checked="" type="checkbox"/> DuPage CoC Shared Assessment	<input checked="" type="checkbox"/> DuPage CoC Entry Assessment	<input checked="" type="checkbox"/> DuPage CoC Exit Assessment
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Household Members	
<input checked="" type="checkbox"/> (143724) Sosa, Sammy Age: 35 Veteran: Yes (HUD)	1
<input checked="" type="checkbox"/> (143429) Test, Just A Age: 9 Veteran: Unknown	2

Move left to right through each assessment tab, completing each assessment from top to bottom. Repeat this process for each household member.

Provider = Select the Program that is providing the service.

Type = Determined by the program. HUD funded programs must use HUD.

Entry Date = The date that the program assessment was completed.

Case Manager

Client Information				Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments

Assign the Case Manager through the **Case Manager** tab.

Case Plans (optional)

Client Information				Service Transactions			
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments

Add a Goal, Case Notes, Action Steps, and any Services as it relates to the assigned goal. Update the client progress on the goal, and add additional goals as needed.

Client Follow-up may be scheduled through a specified Goal or Action Step. A follow-up reminder will appear on the End User's Home Dashboard.


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Services

Client Information


Service Transactions


Service Transaction Dashboard



 Add Need



 Add Service


Or


 Add Multiple Services


 Add Referrals


 View Previous Service Transactions


 View Shelter Stays


 View Entire Service History

Add a **Service Transaction(s)**, including all HH members, for each service provided through this program. Include Service Costs and Funding Sources when applicable. *See Service Transaction Addendum.*

Client Follow-up may be scheduled through a specified Service Transaction. A follow-up reminder will appear on the End User's Home Dashboard.






Service Provider = Entry/Exit Provider

Start Date = The date that the service will begin, or when the service was provided.

End Date = The date that the service will end.

*Neither of these dates can occur before the program entry date, or after the program exit date.

Client Updates

Entry / Exit						
Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
Catholic Charities-ESG-County-HP (3381)	HUD	 01/01/2014				

Client records are to be maintained throughout program participation.

ALL client updates are to be documented in an **Interim Review**. At minimum, an **Annual** type Interim Review must be completed within 1 month prior to the anniversary of the client's program Entry Date. Additional Interim Assessments may be required as determined by the program.

Additional updates may include changes in the **Household, Service Transactions, and Case Plans.**

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Program Exit

Entry / Exit						
Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
Catholic Charities-ESG-County-HP (3381)	HUD	01/01/2014				

Prior to exiting the household from the program, review the **Case Manager**, **Case Plan** and **Service Transaction** tabs to complete any data entry, and to close out records as needed.

Exit Date =
Last day of
program
participation

Then, on the **Entry / Exit** Tab, select to add a **Program Exit**, including all household members who are exiting the program at this time, completing the responses for **Reason for Leaving** and **Exit Destination**. Update all required assessments for each household member

Follow-Up

Entry / Exit						
Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
Catholic Charities-ESG-County-HP (3381)	HUD	01/01/2014	03/01/2014			

Complete the **follow-up** assessment, as determined by your program, through the exited program on the **Entry / Exit** Tab.