Standard Data Entry Workflow SP5.14

This document outlines the standard data entry workflow that uses program entries and exits as prescribed by the HUD HMIS Data Standards and our HMIS vendor. Learning and following the standard workflow ensures complete, timely, and accurate data collection for three aspects:

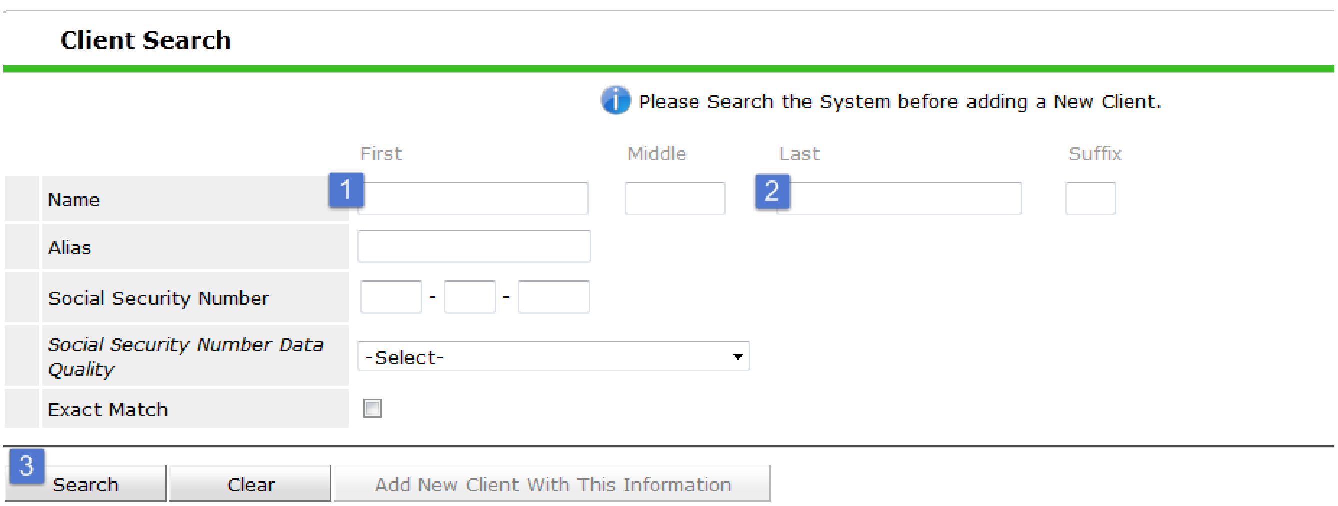
1. Reporting
2. Coordination of services
3. Meeting local, state, and federal data collection requirements

Reference the HMIS Data Standards on the HUD Exchange for more details on each of the data elements, who they are required for, when they are required to be captured, and what is being captured.

Prior to collecting or entering any data

- 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.

ClientPoint



Search for the client in **ClientPoint**, reviewing all search results for identifying information that matches that of the client's (name, social security number, date of birth, etc.). If no match is found, proceed to *Add New Client With This Information*.

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

If the client signed the *Client Data Sharing Refusal Form*, then lock the record now, or contact your Agency Data Administrator or the HMIS Help Desk, nilhmis.cayzu.com, for further assistance. See Visibility Adjustment Addendum.

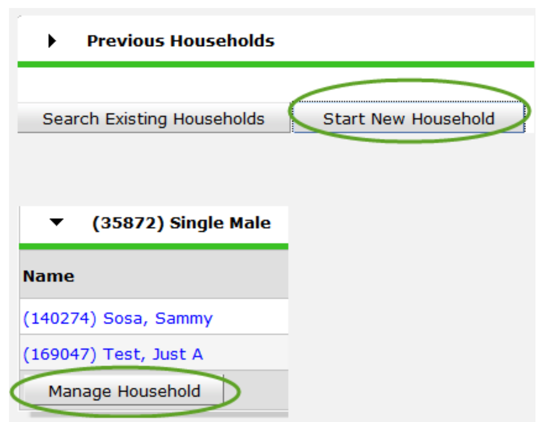
Client Profile

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

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

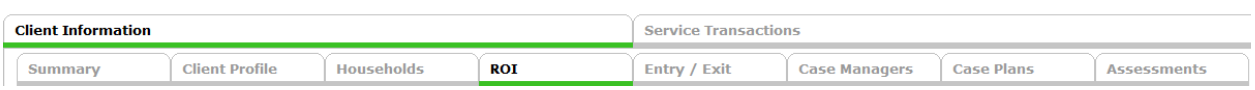


Everyone must be assigned a household, and each household must have a Head of Household. *See Household Addendum*.

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, nilhmis.cayzu.com, for further assistance. See Visibility Adjustment Addendum.

Release of Information (Optional)

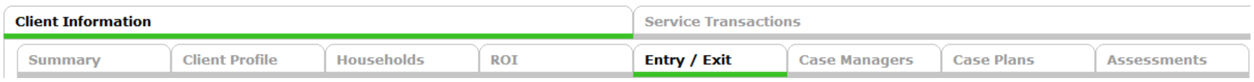


Start Date ≤ Program Entry Date

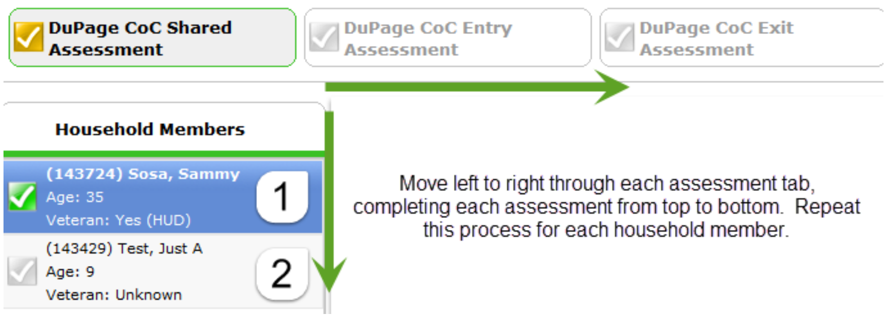
End Date = 3 years from the Start Date, or as otherwise stated in the signed statement and/or Agency Privacy Notice.

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

Program Entry



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



Provider = Select the Program that is providing the service.

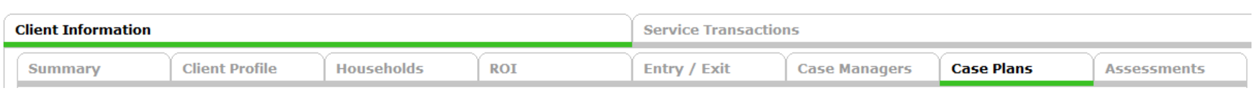
Type = Determined by the program. HUD funded programs must use HUD.

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

Case Manager

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

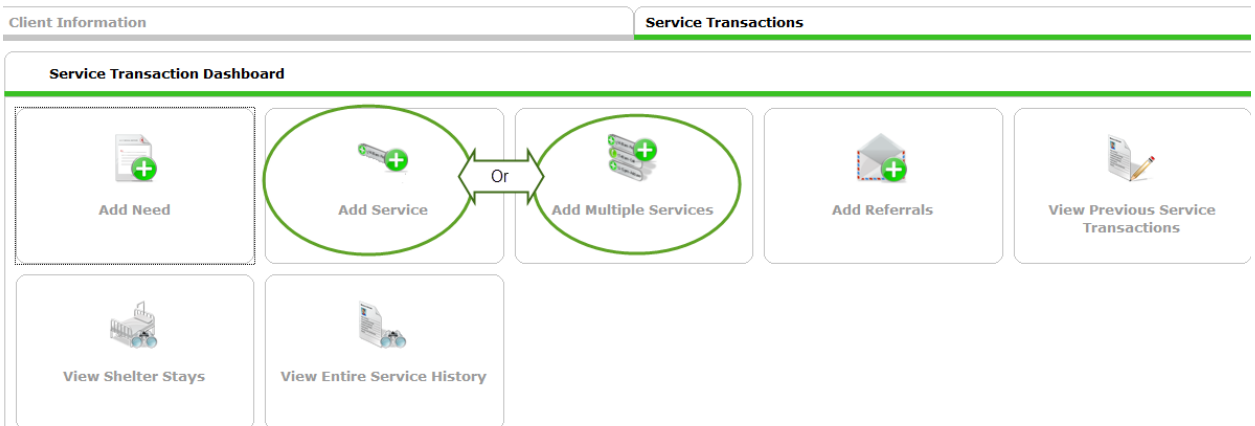
Case Plans (optional)



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.

Services



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.

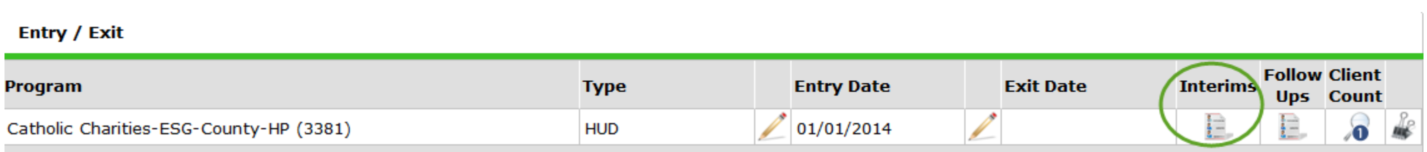
Service Provider = Entry/Exit Provider

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

End Date* = The date that the service will end.

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

Client Updates



Client records are to be maintained throughout program participation.

<u>ALL</u> 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**.

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 <u>all</u> required assessments for <u>each</u> 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.

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