

# Hot Topic Thursdays- How to Exit Inactive Clients

September 25, 2025

10:00am-10:30am



**NC COALITION** to  
**HOMELESSNESS** end

# Agenda

- What counts as client engagement?
- How to Determine Inactivity
  - Street Outreach
  - Permanent Housing
  - Emergency Shelter
- How to Manage Client Exit
  - Street Outreach
  - Permanent Housing
  - Emergency Shelter

# What does the client workflow look like?

Clients are inactive after 90 days of no contact

## Street Outreach

- Initial Outreach and relationship building
- "Official" Date of Engagement begins the day the client agrees to a housing plan
  - Full intake completed
- Ongoing work is recorded via Interim assessments and current living situations

## Most Other Project Types

- Full intake on Day 1
- Ongoing work is recorded via Interim assessments and current living situations

# Pop Quiz!

Is this client active?

Your client has been enrolled in your SO project for 120 days (since 5/25/25). You have not been able to reach your client in person or by phone in over 92 days (since 6/24/25).

- Client is inactive

How should this client be exited?

- Using back date to 6/24/25, client should be exited on last date of contact.

# Pop Quiz!

Is this client active?

Your SSO client has been enrolled since 9/24/24. You spoke with your client last month for case management (8/24/25), but their most recent interim update was 4 months ago (4/24/25).

- Client is Inactive according to HMIS

How should this client be exited?

Using back date to the last date of contact, add the missing Interim Update for 8/24/25. The client will then appear active.

# Pop Quiz!

## Is this client active?

Your SSO client was enrolled in your project on PIT night in January, but you have not been able to find or speak with them since that night. It has been 236 days of no contact.

- Client is Inactive.

## How should this client be exited?

- Using back date to one day after PIT night, the client should be exited one day after PIT count when you last contacted them.

# Street Outreach

How to Exit Clients  
(After 90 days no contact)



Project exit represents the end of a client's participation with a project.



The exit date should match the date that the client is no longer considered to be participating in the project.



In the event a client has not been in contact longer than 90 days, the project exit date should be recorded as of the last recorded CLS.

# How to Exit Clients (After 90 days no contact)

Coordinated Entry SSO Projects



Project exit represents the end of a client's participation with the CE system.



The exit date should match the date that the client is no longer considered to be actively seeking crisis or housing assistance from the CoC



In the event a client has not been in contact longer than 90 days, the project exit date should be recorded as of the last recorded CLS.

# All other Access Points

## How to Exit Clients (After 90 days no contact)



If a client uses a service for just one day (i.e., starts and stops before midnight of same day), then the Project Exit Date may be the same as the Project Start Date.



For residential projects, the client's *Project Exit Date* would be recorded as the last day the client appeared at the residential project



For non-residential projects, the exit date must represent the last day a contact was made (such as the last CLS update) or a service was provided



The exit date should match the date the client is no longer considered a participant in the project.

# Ways to Determine Inactivity

- A008- Street Outreach CLS Report Guide
  - Street Outreach projects only
  - <https://ncceh.zendesk.com/hc/en-us/articles/16068657728915-A008-Street-Outreach-CLS-Report-Guide>
- APR and CAPER Reports
  - Table 6f
  - Table 22a2
- Service Transaction Report
  - Only w/ service transaction workflow

**Next Meeting:**

**Hot Topic: Adding and Updating  
Disabling Conditions**

October 9<sup>th</sup>, 2025, 10:00AM



**NC COALITION** to  
**HOMELESSNESS** end

# Hot Topic Thursday's

September and  
October

2025

Thurs  
9/11

## Start Vs Interim: Where to correct your data?

Building rapport with a client takes time. Thankfully, HMIS is flexible for you to update client profiles to reflect their experiences and life events over time. Please attend to have a discussion about when to use the start assessment, and when to use an interim update to edit a client profile.

## How to Exit Inactive Clients

If a client needs to be unenrolled from a project, there are different considerations to make for each exit. No matter the project type, you need to be here to make sure you can exit these clients accurately for positive quality data outcomes!

Thurs  
9/25

Thurs  
10/9

## Adding and Updating Disabling Conditions

Updating disabling conditions can be tricky! Come discuss the correct steps to take when adding or updating disabling conditions that a client may have.

## Updating Sub-Assessments when Previous Data is Wrong

HMIS is a live site where people's information is collected in a fluid and ongoing way. To ensure the correct information is recorded and updated, we have to be sure the update is made the correct way in the system.

Thurs  
10/23



Email Us: [hmis@ncceh.org](mailto:hmis@ncceh.org)



NCCEH

Poll!



## Contact NCCEH

hello@ncceh.org

919.755.4393

NCEndHomelessness 

@NCHomelessness 

nc\_end\_homelessness 

## Contact NCCEH Data Center Help Desk

hmis@ncceh.org

919.410.6997

