Street Outreach Entry/Exit Workflow

Before getting started, we recommend reviewing this ZenGuide article about unique things to street outreach projects: *Street Outreach Basic Overview.*

Contents

Initial Contact (ClientPoint Entry)

A. *Home Dashboard*
   1. Log into HMIS@NCCEH
   2. Click **Enter Data As** then click the **green plus** next to the project for which you are entering data

B. *Client Search*
   1. Click on **ClientPoint**
   2. Enter Head of Household's Name and/or partial SSN
   3. Click **Search**
      a. If a match is found, confirm the details match the client's name, date of birth, and social security number. If it is the same person, click on the **green plus** to the left of the client's name
      b. If no matches are found, try at least two other ways to search for the client (partial name, alias or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, and click **Add New Client with This Information**

      Note: If name is unknown at the point of initial contact, use a fictitious name (e.g., Redhat Tenthstreetbridge), and make sure the **Name Data Quality is "Partial, street name, or code name reported".*

C. *Client Profile*
   1. *Back Date Prompt*: change the date to match the intake date and click **Set New Back Date**
   2. Click on the pencil next to **Client Demographics.** Fill in the appropriate information and click **Save**.
   3. Add or update additional information under "Client Profile: all projects"
      i. *Only complete additional racial data elements if the client identifies with more than two groups*

ii. *Add Client Contact Information, including methods to get in touch with the client. Other Frequent location can be used for*

D. Households

If the client is presenting as a single client, skip this tab.
If the client is presenting as a household, review this ZenGuide Article for instructions on how to create a household. For managing households, other related articles are here.

E. Release of Information (ROI)

CONTACT THE DATA CENTER if the client marked "NO" to any section of the ROI or did not have a privacy conversation about HMIS sharing yet. Send the Client ID to be locked down to hmis@ncceh.org.

*Note: Verbal ROIs are acceptable for HMIS and are valid for one year. A signed copy must be collected at the next in-person meeting.

1. Click on **ROI** tab
2. Click **Add Release of Information**
    a. Select all members of household
    b. Fill in **Release Granted**
    c. Fill in **End Date** with date one year from date signed
    d. Select **Documentation** type
    e. Fill in **Witness** full name with the name of the staff that conducted the privacy conversation
    f. Click **Save Release of Information**

F. Entry/Exit

1. Click **Entry/Exit** tab
2. Click **Add Entry/Exit**
3. Confirm Project Start Data
    a. If there is more than one client entering, check the box next to each additional household member that is entering the project. *Anyone not checked will be excluded from the project.*
    b. Confirm the **Provider** listed is correct.
        i. *The default provider appearing will be whatever was selected under Enter Data As when first logging into HMIS. If the provider is not correct, click Cancel. Set the Enter Data As and re-search for the head of household.*
    c. Select **HUD** as the Type
    d. Confirm the **Project Start Date**
    e. Click **Save & Continue**
4. Complete the assessment
    a) *If the screen reads "No Entry Assessment had been specified for this Provider", the wrong project type was selected. Scroll to the top of the screen. Select the correct **Type** from the drop menu. Click **Update.***

NOTE: Complete all Data Elements in the assessment that you know at entry. Street Outreach clients may not provide you with all the information at initial contact so you may need to edit the Project Start assessment to add information learned from the client as you build rapport. At a minimum, you will need to complete Name, Date of Birth (or approx.), Prior Living Situation, NC County of Service, Client Location, and Current Living Situation. For more information about Current Living Situations, review our CLS ZenGuide Article.

5. Click **Save**
   a. *If applicable:* Scroll to the top of the assessment then click on the name of the next additional household member from the "Household Members" menu on the left.
   b. Repeat steps 4-6 until all household member data has been entered.
6. Click **Save & Exit**

If adding services, please refer to last section of this guide for how to add a service

Rapport Building (Interim Update/Annual Assessment)

**Note: As the outreach worker's relationship with the client develops, the user can update the client's record with data elements as they learn about them. Current Living Situation assessments must be recorded with every contact made with a client and are defined as interactions between a worker and a client designed to engage the client. Each contact is recorded in the Current Living Situation with the date that it occurred in an interim review. (i.e. 5 contacts on different days=5 separate interim reviews with 5 separate CLS entries).*

A. Home Dashboard

1. Log into HMIS@NCCEH
2. Click **Enter Data As** then click the green plus next to the project for which you are entering data

B. Client Search

1. Click on **ClientPoint**
2. Enter the head of household's HMIS ID number or search by the head of household's name

   **Note: If a street or code name was initially entered and you've since obtained the client's real name, it can be updated. When replacing the fictitious name with the client's actual name, it is important to do a search in HMIS to see if another record already exists for the client. If the client already has a profile, contact the Help Desk to request the records be merged.*

3. Set **Back Date Mode** for the date that the update was completed. Click **Set New Back Date**

C. Release of Information (ROI)

This step is only required if the ROI has not yet been collect or if completing an Annual Assessment on client's yearly anniversary

D. *Entry/Exit*

1. Click **Entry/Exit** tab
2. Click **Interim** icon listed within your project's row
3. Click **Add Interim Review**
4. Complete Interim Review Data
   a. If there is more than one household member served in the project, check the box next to each additional household member that is participating in the project.
   b. Select the **Interim Review Type**
      - "Update": completed anytime information has changed since project entry
      - "Annual Assessment": required assessment for all clients remaining in a project after one year; Annual Assessments must be completed within 30 days before or after the Head of Household's project start anniversary date (example: if the HoH entered the project on 3/17/2022, the Annual Assessment would need to be completed between 2/15/2022 and 4/16/2023).
   c. Confirm the **Review Date**
   d. Click **Save & Continue**
5. Update assessment information

   - *For tips on how to create a new Current Living Situation, please view the following TipSheet/Guide: Recording a Current Living Situation*
   - *For tips and more details about how to update HUD sub-assessments (for income, disabling condition, non-cash benefits, and health insurance), please view the following Tip Sheet/Guide: Updating HUD Verification Sub-Assessments*

6. Click **Save & Exit** once all assessments for all household members have been completed.

If adding services, please refer to last section of this guide for how to add a service

Date of Engagement

**A Date of Engagement is the day on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan and must be recorded in HMIS.*

- *This date may be on or after the Project Start Date and must be prior to the Project Exit Date.*
- *If the client exits without becoming engaged, leave the Date of Engagement blank.*
- *Assuming the client was contacted on the date of engagement, a Current Living Situation must also be entered for that date.*

The Date of Engagement coincides with the requirement for HMIS data quality; therefore, all Data Elements should be entered into HMIS on or before the DOE!

A. Home Dashboard

1. Log into HMIS@NCCEH
2. Click **Enter Data As** then click the green plus next to the project for which you are entering data

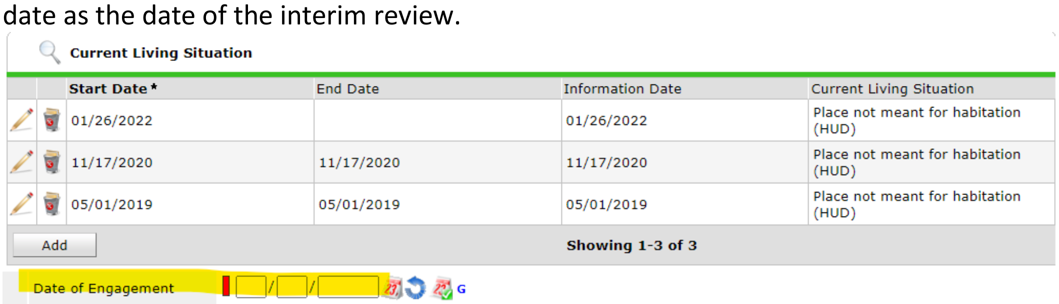
B. Client Search

1. Click on ClientPoint
2. Search for the client that is exiting the project (name search or HMIS ID search)
3. Set Back Date Mode for the date that the client is exiting the project. Click Set New Back Date

C. Entry/Exit

**Note: If your Date of Engagement is the same date as the project entry, the DOE should not be entered in an interim review. It should be entered directly into the entry assessment, as well as a Current Living Situation with the same date.*

1. Click Entry/Exit tab
2. Click Interim icon listed within your project's row
3. Click Add Interim Review
4. Select the Interim Review Type. *Should be update if going in to add the DOE
5. Scroll down the Date of Engagement field, and enter the DOE, which should be the same date as the date of the interim review.


Current Living Situation

Start Date *	End Date	Information Date	Current Living Situation
01/26/2022		01/26/2022	Place not meant for habitation (HUD)
11/17/2020	11/17/2020	11/17/2020	Place not meant for habitation (HUD)
05/01/2019	05/01/2019	05/01/2019	Place not meant for habitation (HUD)

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Date of Engagement

6. Add a Current Living Situation (there is always a contact on the same date)
7. Click Save and Continue, and then Save and Exit
8. If the DOE was entered after the entry start date, be sure the original intake assessment is complete. All data elements must have responses by the Date of Engagement.
   a. Go back to the Project Start date for the entry assessment and enter and/or review all data elements.
   b. Data Quality is tracked on and after DOE

Services End (ClientPoint Exit)

The exit date should coincide with the date the client is no longer considered to be participating in the project. Reasons to exit a client include:

- *The client has entered another project type or has otherwise found housing*
- *The client is engaged with another outreach program or project*
- *The client is deceased*
- *The outreach worker has been unable to locate the client for an "extended period of time" (about 90days) and there are no contacts recorded in the Current Living Situation in that period*

- *Funding ends*

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B. Client Search
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2. Search for the client that is exiting the project (name search or HMIS ID search)
3. Set **Back Date Mode** for the date that the client is exiting the project. Click **Set New Back Date**

C. Entry/Exit

1. Click **Entry/Exit** tab
2. Click the pencil next to the Exit Date column within your project entry's row
3. Complete Exit Data
    a. If there is more than one client exiting, check the box next to each additional household member that is exiting the project.
    b. Confirm the **Exit Date**
    c. Select **Reason for Leaving**
    d. Select **Destination**
    e. Click **Save & Continue**
4. Complete exit assessment information.
5. Click **Save & Exit** once all assessments for all household members have been completed.

Adding Services

Service Transaction records are required by some Street Outreach funders. Check with your agency if you have questions.

1. Click **Service Transactions** Tab
2. Click **Add Service**
3. Check that all household members receiving the service are checked
4. Confirm that the correct **Service Provider** is displayed and that your **Start Date** and **End Date** are correct. *The start and end date fields should match the day the client was provided this particular service.*
5. Select the correct service from the **Service Type** drop-down menu
6. Click **Save & Continue**
7. *If your project uses the FundManager module to track the draw down of grants, ask your Agency Admin for steps to* **Apply Funds for Service**. *If not, SKIP.*
8. Scroll down to the **Need Information** section to update the "Need Status" and "Outcome of Need" according to the client's situation.
9. Click **Save and Exit**