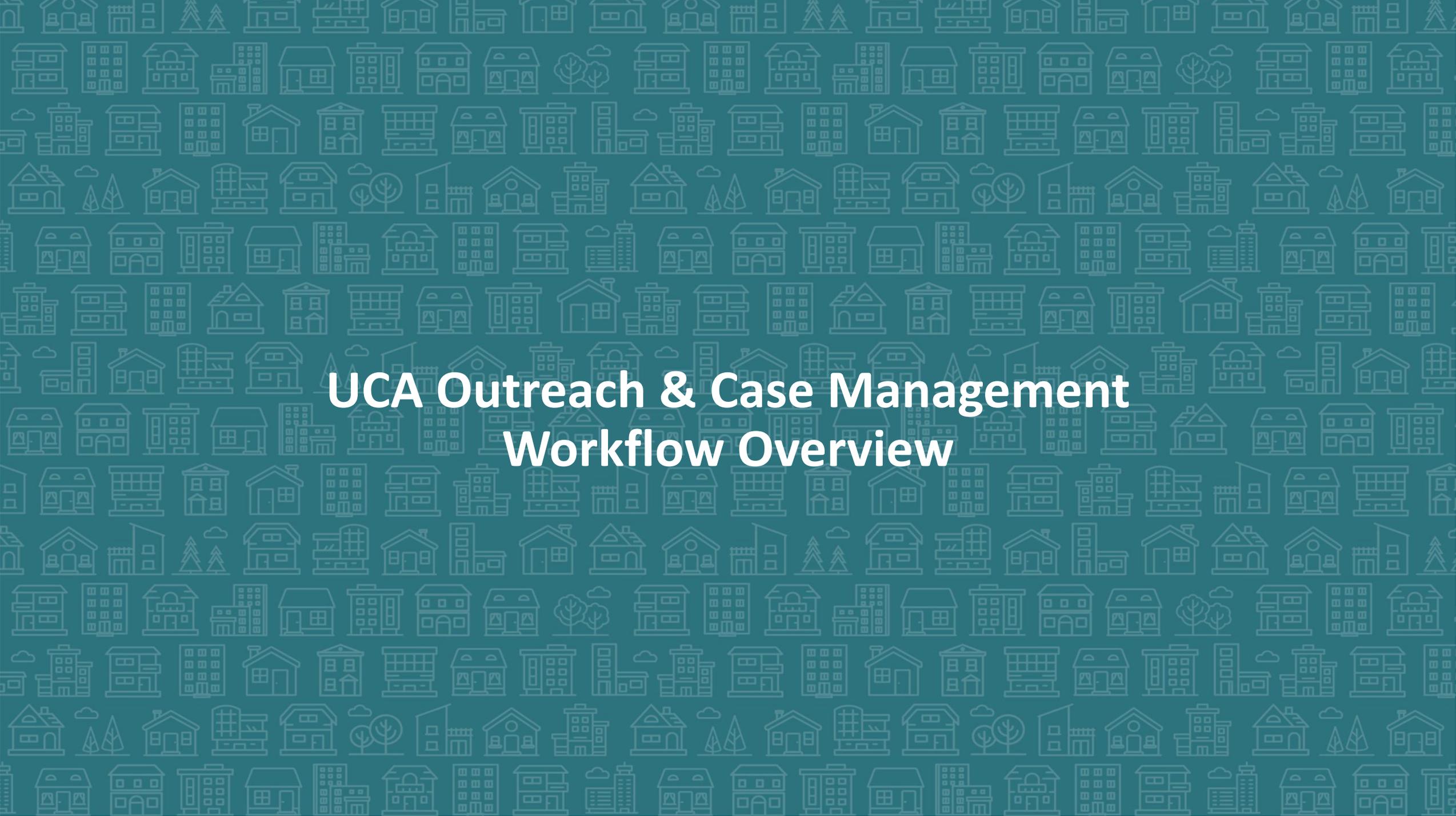


# UCA Workflow and HMIS Training

# Agenda

- UCA Outreach & Case Management Workflow Overview
- UCA Outreach & Case Management HMIS Project data entry
- Entry Point Front Door Project Overview
- Entry Point Front Door HMIS Project Data entry
- Durham Specific Data elements

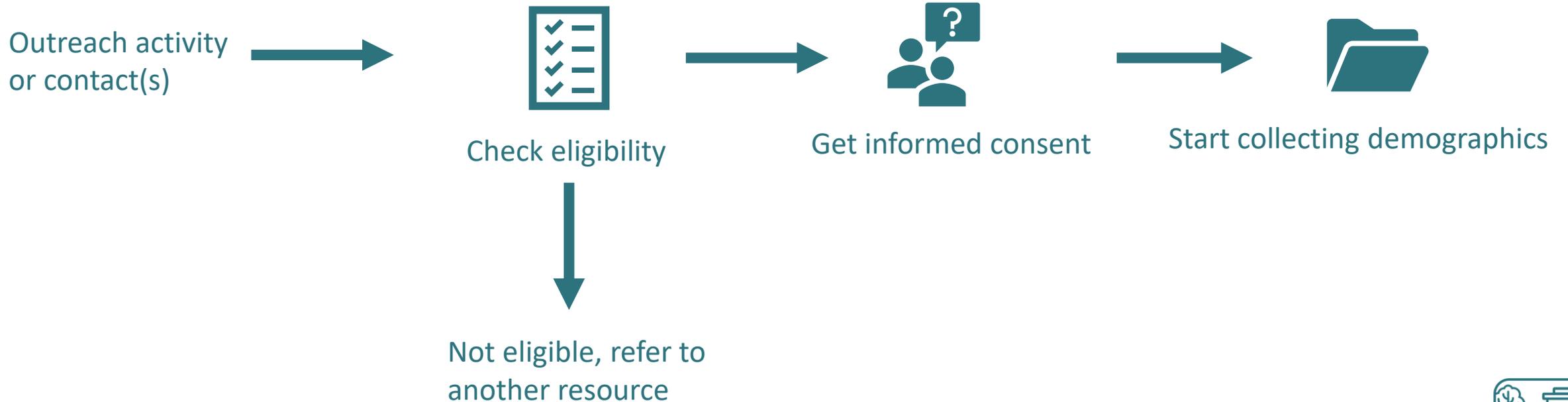




# UCA Outreach & Case Management Workflow Overview

# UCA Outreach Workflow: Eligibility, Consent, Demographics

Please note: These activities may happen over multiple contacts instead of at first contact



# Project Start Date



## Collection Notes

Project Type	When do I enter Project Start?
Street Outreach (SO)	First contact between client and outreach worker
Residential homeless (ES, TH)	First night the client sleeps in a bed
Permanent Housing (RHR, PSH)	The date when an eligible client accepts offer of available services
All Other (SSO, PV)	First services delivered to client

# Current Living Situation



## What

The date and location of where clients are staying/sleeping at each interaction designed to engage the client



## Who

All clients



## Data Collection Stage

On Entry, Update, and Annual Assessments



## Collection Notes

Every contact must be recorded for Street Outreach projects, regardless of funding source. Even when the Project Start Date or Date of Engagement is the same day



# Date of Engagement



## What

The date when a client agrees to program services after one or more contacts

Adopting a case plan or agrees to a client assessment



## Collection Notes

Leave blank if Date of Engagement does not occur

All other data elements should be complete and accurate on the Date of Engagement



# Date of Status Determination



## What

The date when a client's eligibility for UCA services is final

The result of this final screen, whether the client is eligible and agrees to program services



## Collection Notes

Leave blank if Date of Status Determination does not occur

All other data elements should be complete and accurate on the Date of Status Determination

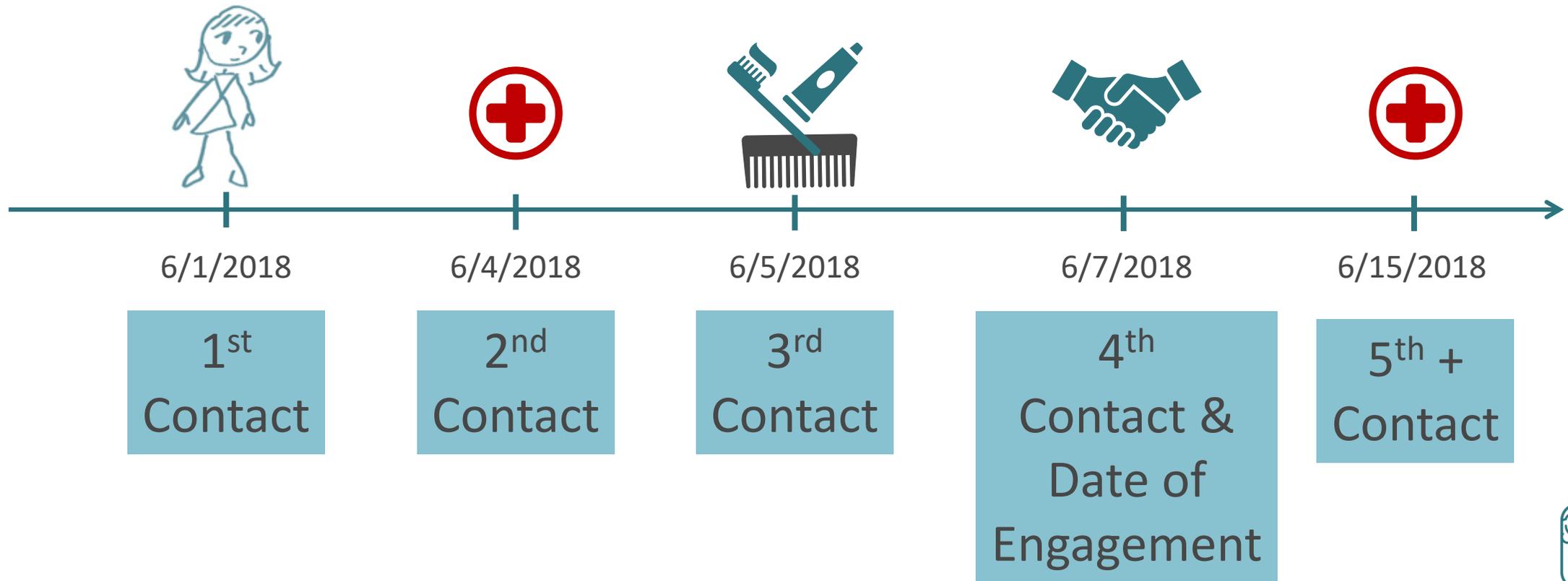


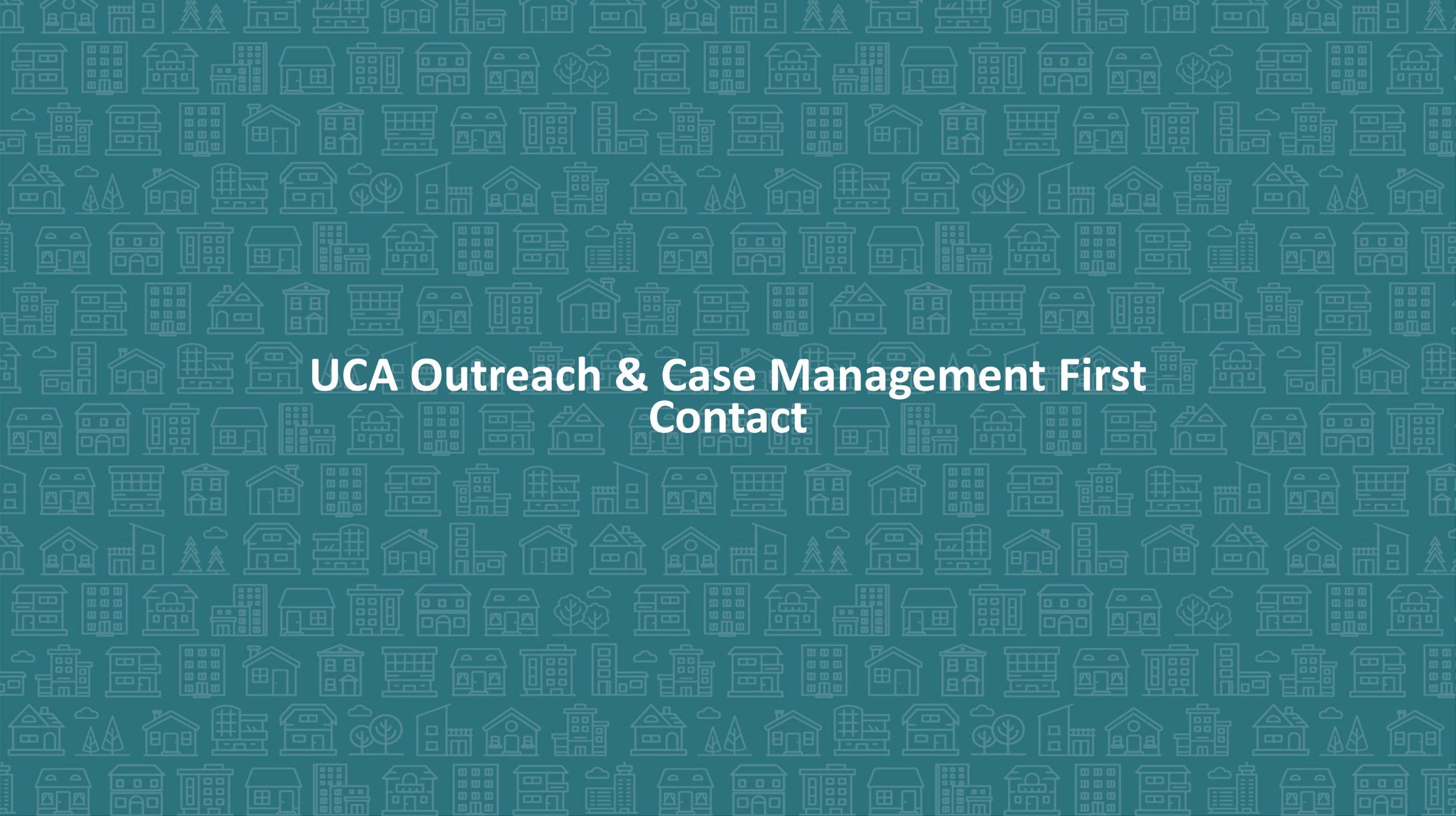
# Entering Street Outreach projects into HMIS

- **Step 1:** Create the client profile (or find)
- **Step 2:** Create a Project Start on the Entry/Exit tab to record the first Contact
- **Step 3:** Record additional contacts through Interim Updates (as they happen)
- **Step 4:** Record the Date of Engagement through an Interim Update once a client agrees to services then complete data elements on Project Start assessment
  - Exception: If a client has a Date of Engagement on Day 1, record the date on the Project Start/Entry Assessment
- **Step 5:** Record the Date of Status Determination through an Interim Update, this could be the same date or different from the Date of Engagement



# Project Start Date: Street Outreach





# UCA Outreach & Case Management First Contact

# Client Creation, Profile, Demographics, Households, and eROIs in HMIS

The first three steps to HMIS are in three tabs

**Client - (5) Tucker, Jamie**

---

 (5) Tucker, Jamie  
Release of Information: **None**

---

**Client Information**

Summary   **Client Profile**   Households   ROI   Entry / Exit

---

 **Client Record**

---

Name	Tucker, Jamie
Name Data Quality	Full Name Reported
Alias	
Social Security	251-71-5530
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	Yes (HUD)
Age	42



# Remember to check EDA and Back Date mode!

Make sure you are in:

- Enter Data As mode for the Street Outreach project
- Back Date is set to your first contact with client

The screenshot displays the ServicePoint web application interface. At the top left is the ServicePoint logo with the tagline "Connecting Your Community." The top right shows the user "Andrea Carey" as "System Admin II". A yellow banner across the top contains the text "ServicePoint Training Site" and "Heading Home - Rowan County" with a left-pointing arrow, followed by "or" and a right-pointing arrow leading to a "Mode:" dropdown menu. The dropdown menu is open, showing three options: "Shadow housing", "Enter Data As Heading Home - Rowan ..." (highlighted), and "Back Date 08/10/2019 2:00:00 AM" with a red 'X' icon. Below the banner is a green navigation bar with "ClientPoint > Client Profile" and a search box labeled "Type here for Global Search". On the left is a sidebar with "Last Viewed" and "Favorites" sections. The "Last Viewed" section lists "(16) Ice Cream, Flavor of" with a "Less" link. The "Favorites" section has "Home" and "ClientPoint" buttons. The main content area shows "Client - (16) Ice Cream, Flavor of" with a lock icon, a yellow bar with the same client name and "Release of Information: None", and a "Client Information" section below.

# Not all information is required at first contact

Record what information you have after 1<sup>st</sup> contact

- If name is unavailable:
  - Use a description as the first name and location as the last name
  - Like “Red Umbrella” “I-40 Exit 271”
  - Remember to use Name Quality Drop-down
- Update name on or before Date of Engagement

**Client - (213) I-40 Exit 271, Red Umbrella**

 (213) I-40 Exit 271, Red Umbrella  
Release of Information: **None**

**Client Information**

Summary    **Client Profile**    Households    ROI

 **Client Record**

Name	I-40 Exit 271, Red Umbrella
Name Data Quality	Partial, Street Name, or Code Name Reported
Alias	
Social Security	
SSN Data Quality	Data not collected (HUD)
U.S. Military Veteran?	No (HUD)
Age	

# Complete as much as possible at first contact

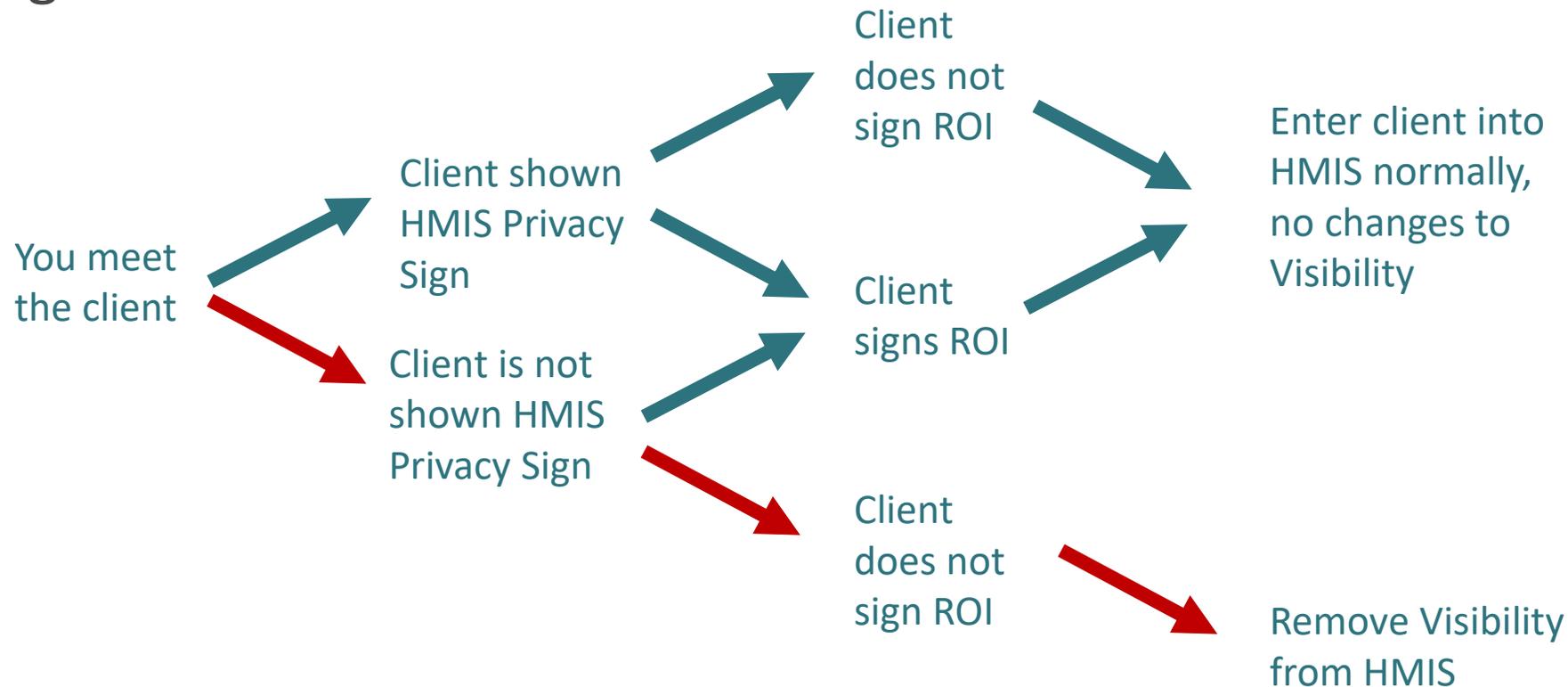
Record what information you have after 1<sup>st</sup> contact

- Client Record
- Client Demographics
- Client Contact Information
- Household creation (if appropriate)
- ROI
- Project Data Elements



# ROIs, Consent, and HMIS Visibility at 1<sup>st</sup> Contact

Without the HMIS Privacy Sign shown or ROI signed, lock down the client's information in HMIS. It can always be unlocked after an ROI is signed.



# Has the client given consent?

Record what information you have after 1<sup>st</sup> contact

- ROI must be signed on or before Date of Engagement
- If no privacy and consent conversation has occurred, skip the ROI tab and lock down client visibility

Client - (213) I-40 Exit 271, Red Umbrella

(213) I-40 Exit 271, Red Umbrella  
Release of Information: None

Client Information

Summary Client Profile

Client Record

Name	I-40 Exit 271, Red Umbrella
Name Data Quality	Partial, Street Name, or C
Alias	
Social Security	
SSN Data Quality	Data not collected (HUD)
U.S. Military Veteran?	No (HUD)
Age	

Client Demographics

Date of Birth	
---------------	--

Client Visibility

Client

Client	(213) I-40 Exit 271, Red Umbrella
Date Updated	08/15/2019 02:33:57 PM
Visibility Updated	08/15/2019 02:33:57 PM

Visibility Groups

Group ID	Group Name	Group Type	Last Updated
0	Global	Public	08/15/2019
15165	Heading Home - Rowan County(7388) - Children Included	Public	08/15/2019

Deny Groups

Showing 1-2 of 2

Add Visibility Group

Exit

Issue ID Card

Change Clear

# Project Start begins with first contact

Record what information you have after 1<sup>st</sup> contact

- Add the Project Start
- Entry type is PATH for UCA

Client - (16) Ice Cream, Flavor of

(16) Ice Cream, Flavor of  
Release of Information: None

Client Information

Summary Client Profile

Entry / Exit

Program

Add Entry / Exit

Project Start Data - (16) Ice Cream, Flavor of

Household Members

This Client is not a member of any Households.

Project Start Data - (16) Ice Cream, Flavor of

Provider \* Heading Home - Rowan County - Street Outreach - State ESG (20020)

Type \*  
-Select-  
Basic  
Basic Center Program Entry/Exit  
HUD  
**PATH**  
Quick Call  
RHY  
Standard  
Transitional Living Program Entry/Exit  
VA

Project Start Date \* 0 : 00 AM

Save & Continue Cancel

# Project Start begins with first contact

Record what information you have after 1<sup>st</sup> contact

- At least Relationship to Head of Household, NC County of Service, Client Location, and Current Living Situation
- Scroll through assessment to check for info gathered during first contact

**Household Members Associated with this Entry / Exit**

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Ups	Reason for Leaving	Destination	Notes
(16) Ice Cream, Flavor of		08/10/2019						

Showing 1-1 of 1

**Entry Assessment**

**Household Members**

- (16) Ice Cream, Flavor of  
Age: 19  
Veteran: No (HUD)

**Project Start: SO** Entry Date: 08/10/2019 02:00:00 AM

**Answer the questions in this section for every client**

Date of Birth	08 / 10 / 2000
Date of Birth Type	Full DOB Reported (HUD)
Gender	Male
Primary Race	Native Hawaiian or Other Pacific Islander (HUD)
Secondary Race	-Select-
Ethnicity	Non-Hispanic/Non-Latino (HUD)
Relationship to Head of Household	Self (head of household)

**Client Information**

Summary

Entry / Exit

Program

Heading Home - Ro

Add Entry / Exit

Assessments

Interims Follow Ups Client Count

Exit

# Project Start begins with first contact

Record what information you have after 1<sup>st</sup> contact

- Scroll to Current Living Situation section
- Add a record for client's first contact

Current Living Situation is a sub-assessment that records different contacts with the client.

If yes for Domestic Violence Victim/Survivor, are you currently fleeing?

**Current Living Situation**

Current Living Situation

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

**Add**

Showing 1-1 of 1

Add Recordset - (16) Baldwin, Friday

Current Living Situation

Start Date and Information Date are the date of data collection

Just like Prior Living Situation!

This section helps determine if clients are Category 2 Homeless

End Date can be updated at the next contact

Lookup by HMIS project name

Start Date *	06 / 23 / 2020				G
End Date	/ /				G
Information Date	/ /				G
Current Living Situation	-Select- G				
If "Other", Specify	G				
Living situation verified by		Lookup	Clear	G	
Is client going to have to leave their current living situation within 14 days?	-Select- G				
<b>If 'Yes' to 'Is client going to have to leave their current living situation within 14 days?' answer the following questions.</b>					
Has a subsequent residence been identified?	-Select- G				
Does individual or family have resources or support networks to obtain other permanent housing?	-Select- G				
Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days?	-Select- G				
Has the client moved 2 or more times in the last 60 days?	-Select- G				
Location details	G				

Save Save and Add Another Cancel



# The client has a Project Start to record first contact

**ServicePoint Training Site**  
 Heading Home - Rowan County  
 August 15, 2019

Mode: Shadow housing  
 Enter Data As Heading Home - Rowan ...  
 Back Date 08/12/2019 2:00:00 AM

ClientPoint > Client Profile

Client - (16) Ice Cream, Flavor of Date: 08/12/2019 2:00:00 AM

Release of Information: None

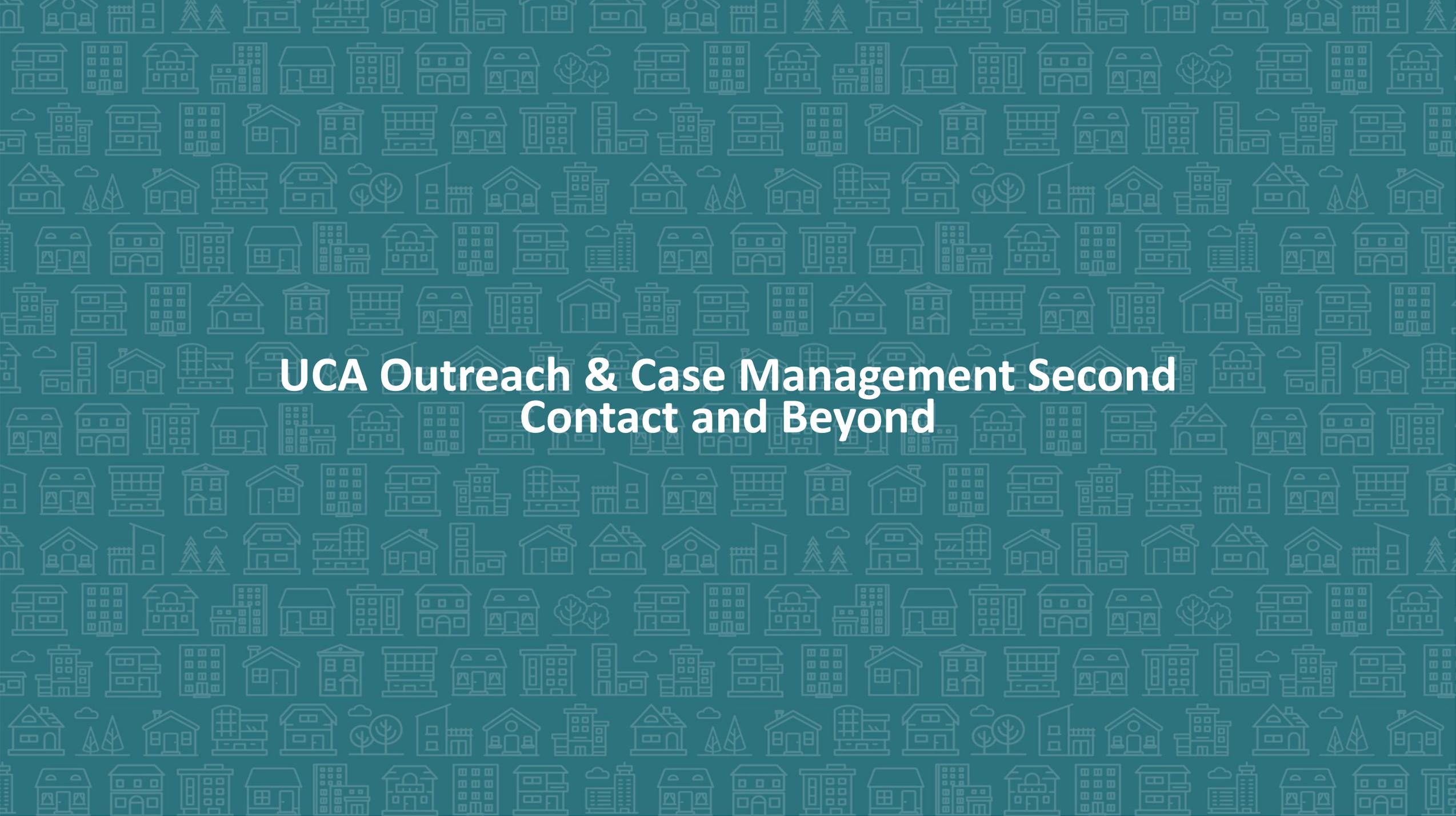
Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Assessments

*Reminder: Household members must be established on Households tab before creating Entry / Exits*

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Heading Home - Rowan County - Street Outreach - State ESG (20020)	PATH	08/10/2019				

Add Entry / Exit Showing 1-1 of 1



# UCA Outreach & Case Management Second Contact and Beyond

# Add more information at the next contact

Record what information you have after the next contact

- Backdate to date of contact
- Add Household or ROI if applicable (contact data center to unlock profile after ROI is completed)
- Add an Interim to record the Outreach contact

Client - (16) Ice Cream, Flavor of

(16) Ice Cream, Flavor of Date: 08/12/2019 2:00:00 AM  
Release of Information: None

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Heading Home - Rowan County - Street Outreach - State ESG (20020)	PATH	08/10/2019				

Showing 1-1 of 1

Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
No matches.		

Add Interim Review

# Add more information at the next contact

Record what information you have after the next contact

- Add an Interim Update

**Add Interim Review - (16) Ice Cream, Flavor of**

**Interim Review Data**

Entry / Exit Provider	Heading Home - Rowan County - Street Outreach - State ESG (20020)		
Entry / Exit Type	HUD		
Interim Review Type *	-Select-		
Review Date *	Update	2	: 00 : 00 AM

Annual Assessment  
Follow-up  
Aftercare (Post Exit)

Save & Continue Cancel

# Add more information at the next contact

Record what information you have after the next contact

- Add the next Current Living Situation information

**Current Living Situation**

Current Living Situation

	Start Date *	End Date	Information Date	Current Living Situation
 	06/23/2020	06/23/2020	06/23/2020	Place not meant for habitation (HUD)

Showing 1-1 of 1

Date of Engagement  /  /     

# Add more information at the next contact

Record what information you have after the next contact

- Change Backdate to the Project Start Date
- Edit the Project Start for Homeless History, Residence, and DV History (Careful! Don't change the Project Start Date) if information collected

Client - (16) Ice Cream, Flavor of 🔒

**(16) Ice Cream, Flavor of** Date: 08/12/2019 2:00:00 AM

Release of Information: **None**

**Client Information** **Service Transactions**

Summary Client Profile Households ROI **Entry / Exit** Case Managers Case Plans Assessments

*i* Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Heading Home - Rowan County - Street Outreach - State ESG (20020)	PATH	08/10/2019				

Add Entry / Exit Showing 1-1 of 1

Street Outreach is the *only* project type where info is added after the Project Start Date



**Complete client info at Date of  
Engagement**

# Use Interim Update to complete info at Date of Engagement

Confirm all information is accurate

- Add new Interim Update to record Outreach contact that results in the Date of Engagement

Client - (16) Ice Cream, Flavor of 

 (16) Ice Cream, Flavor of Date: 08/14/2019 2:00:00 AM  
Release of Information: Ends 08/14/2020

**Client Information** **Service Transactions**

Summary Client Profile Households ROI **Entry / Exit** Case Managers Case Plans Assessments

 Reminder: Household members must be established on Households tab before creating Entry / Exits

**Entry / Exit**

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
 Heading Home - Rowan County - Street Outreach - State ESG (20020)	PATH	 08/10/2019		 2		 1 

Showing 1-1 of 1

# Use Interim Update to complete info at Date of Engagement

Confirm all information is accurate

- Add the next Current Living Situation for when Engagement occurred
- Add the Date of Engagement
- Add Date of Status Determination and other enrollment elements (if appropriate)

## Current Living Situation

Current Living Situation				
	Start Date *	End Date	Information Date	Current Living Situation
 	06/23/2020	06/23/2020	06/23/2020	Place not meant for habitation (HUD)
<input type="button" value="Add"/>		Showing 1-1 of 1		

Date of Engagement	<input type="text" value="06"/> / <input type="text" value="23"/> / <input type="text" value="2020"/>    G
Date of Status Determination	<input type="text"/> / <input type="text"/> / <input type="text"/>    G
Client Became Enrolled in PATH Program	<input type="text" value="-Select-"/>  G
If no, reason not enrolled	<input type="text" value="-Select-"/>  G

# Now all data must be complete!

Client Profile, Household (if applicable), ROI, and Project Start must be complete for the client.

Client - (16) Ice Cream, Flavor of



(16) Ice Cream, Flavor of

Date: 08/14/2019 2:00:00 AM

Release of Information: Ends 08/14/2020

Client Information

Service Transactions

Summary

Client Profile

Households

ROI

Entry / Exit

Case Managers

Case Plans

Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Heading Home - Rowan County - Street Outreach - State ESG (2020)	PATH	08/10/2019		2		1

Add Entry / Exit

Showing 1-1 of 1



NCCEH

# Add more information at Date of Engagement

Record all data when Date of Engagement occurs

- Add Household or ROI if applicable (contact data center to unlock profile after ROI is completed)
- Edit the Project Start for outstanding data elements (Careful! Don't change the Project Start Date)

Client - (16) Ice Cream, Flavor of 

 (16) Ice Cream, Flavor of Date: 08/12/2019 2:00:00 AM  
Release of Information: None

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Assessments

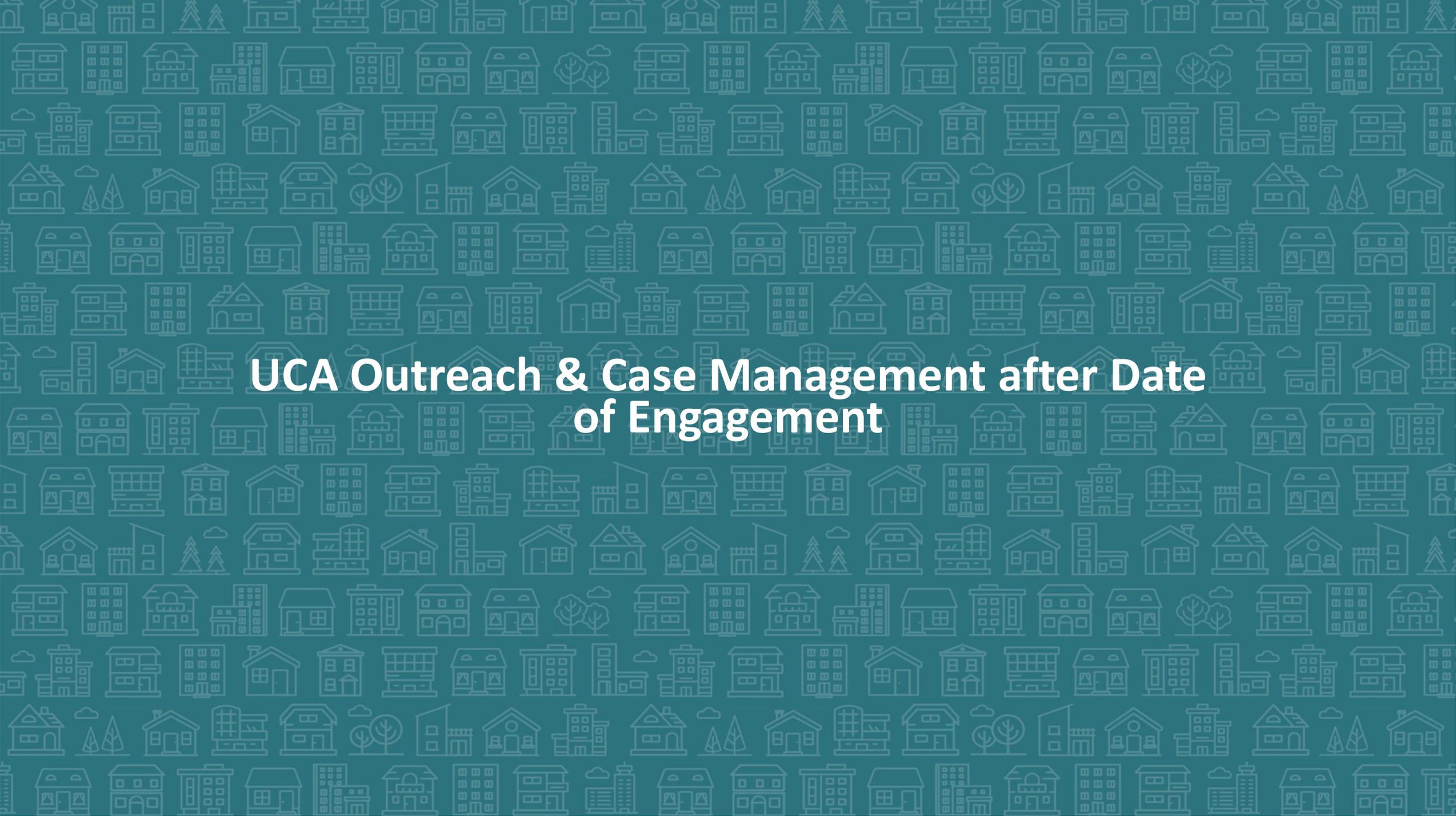
 Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
 Heading Home - Rowan County - Street Outreach - State ESG (20020)	PATH	 08/10/2019				 

Add Entry / Exit

Showing 1-1 of 1

Street Outreach is the *only* project type where info is added after the Project Start Date



# UCA Outreach & Case Management after Date of Engagement

# Use Interim Update to complete info at next contacts

Confirm all information is accurate

- Add the next Current Living Situation for when contact occurred

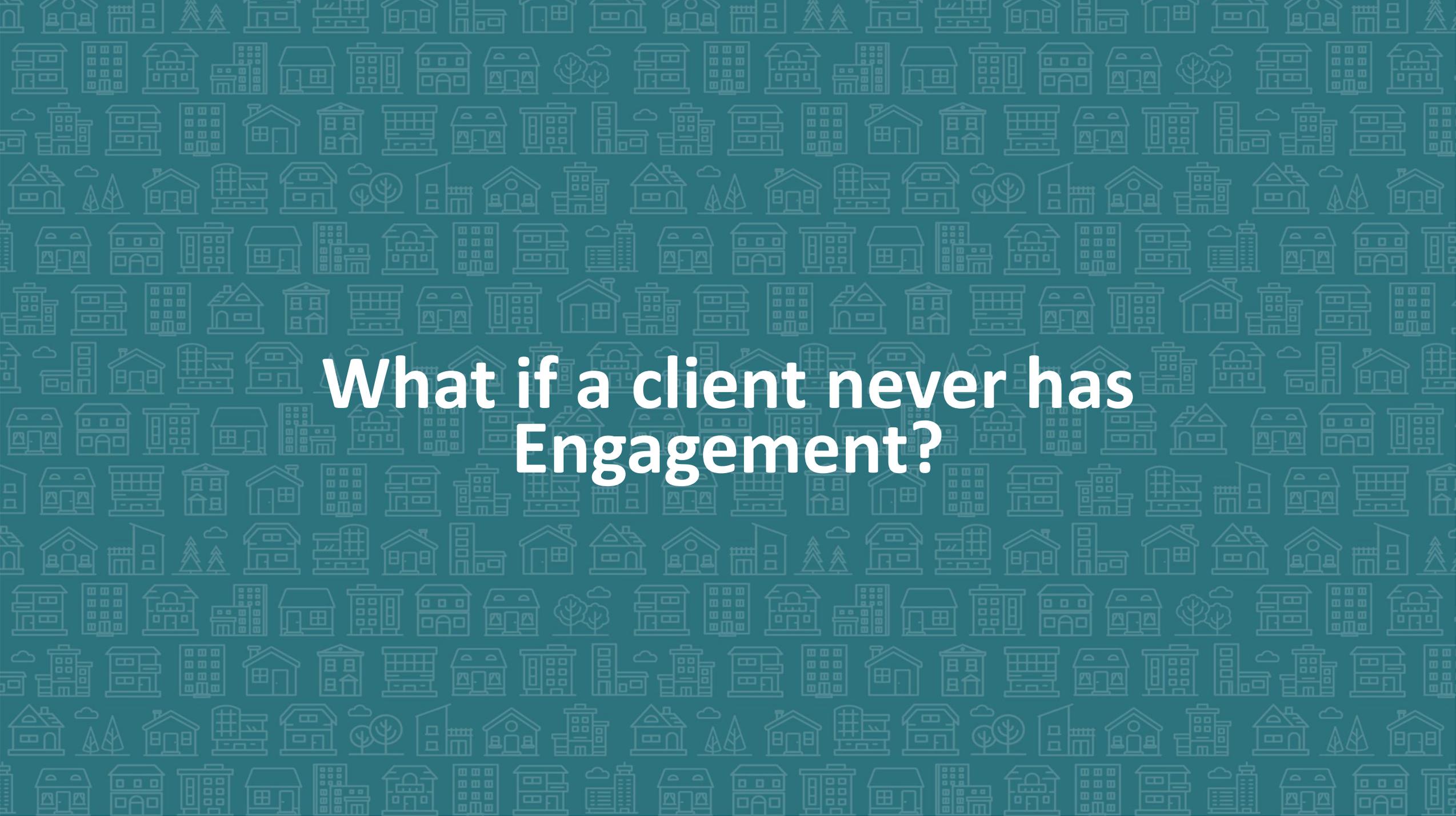
## Current Living Situation

 **Current Living Situation**

	Start Date *	End Date	Information Date	Current Living Situation
 	06/23/2020	06/23/2020	06/23/2020	Place not meant for habitation (HUD)

**Showing 1-1 of 1**

Date of Engagement  /  /     



**What if a client never has  
Engagement?**

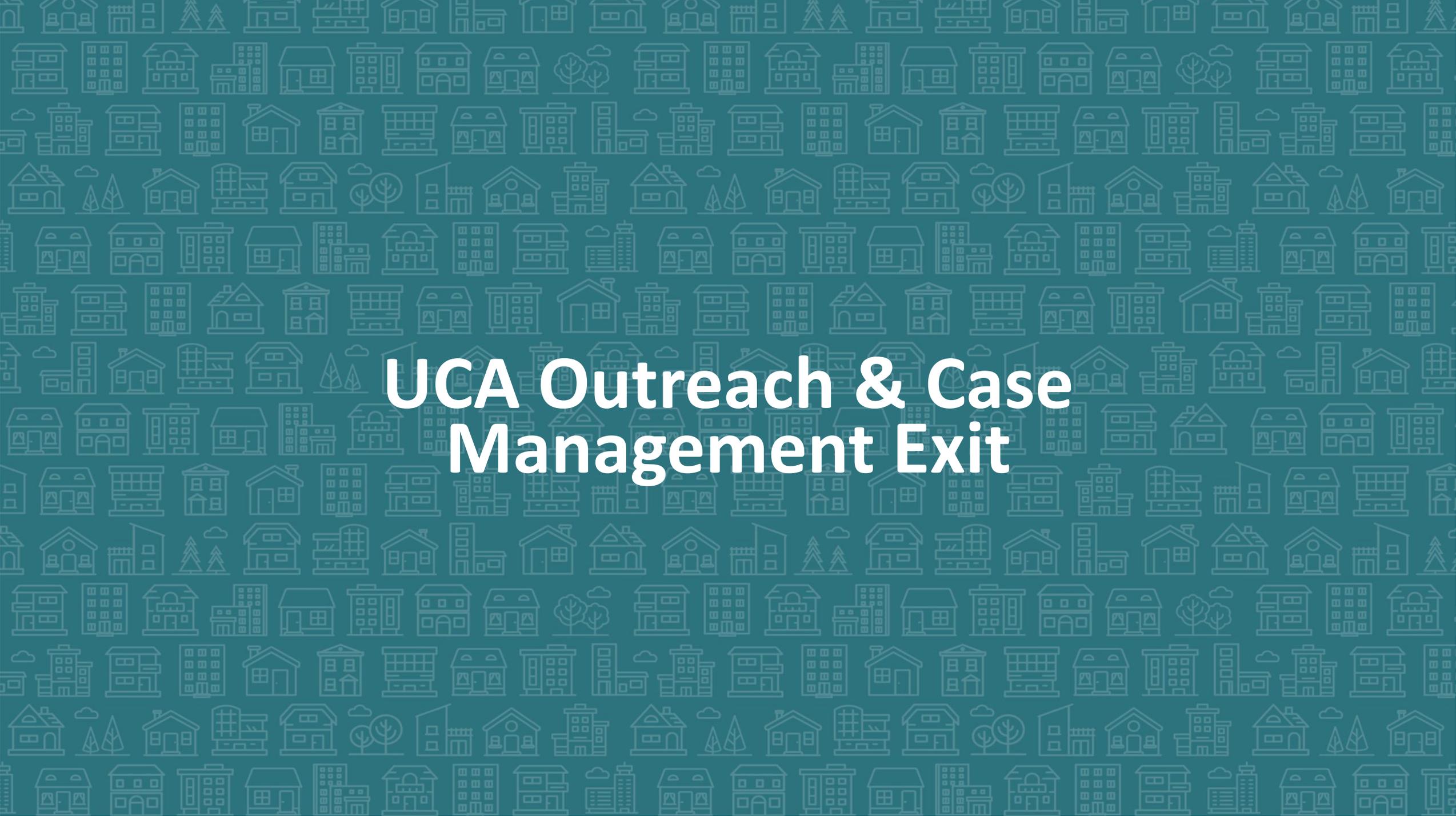
# Client can be exited without Dates of Engagement or Status Determination

Some clients will never fully engage in services

- Leave Date of Engagement and/or Status Determination blank
- The client's information may be incomplete at Project Start and Exit

Recording Current Living Situation at contacts even if some clients never engage, allows a more accurate representation of the Outreach Worker's efforts!





# UCA Outreach & Case Management Exit

# Add Project Exit when appropriate

Create Project Exit as needed

- Add Reason for leaving and Destination
- Edit and update other data elements as needed

Client - (16) Ice Cream, Flavor of 

 (16) Ice Cream, Flavor of Date: 08/12/2019 2:00:00 AM  
Release of Information: **None**

**Client Information** **Service Transactions**

Summary Client Profile Households ROI **Entry / Exit** Case Managers Case Plans Assessments

 Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
 Heading Home - Rowan County - Street Outreach - State ESG (20020)	PATH	 08/10/2019				 

Showing 1-1 of 1



# Entry Point Front Door Project Overview

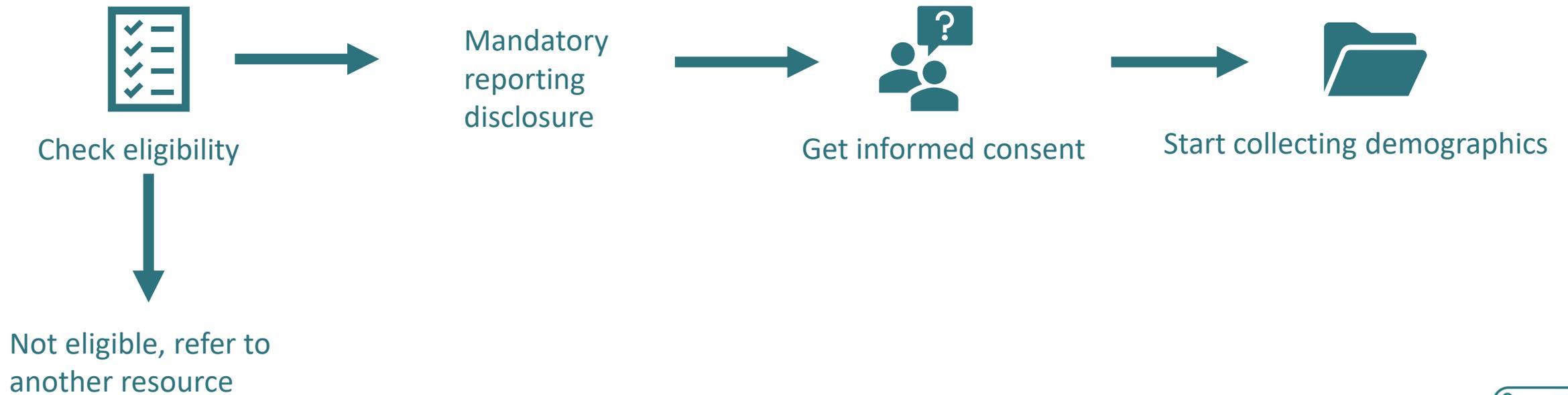
## Entry Point Resources and Guides

Go to [nces.ed.gov/durhamce](https://nces.ed.gov/durhamce) for P&P, step-by-step guide, and more!



NCCEH

# Front Door: Eligibility, Disclosure, Consent, Demographics



# UCA will confirm shelter eligibility prior to entry point project entry.

Experiencing homelessness

Durham resident (see policies) OR Person experiencing Category 1 homelessness in Durham County

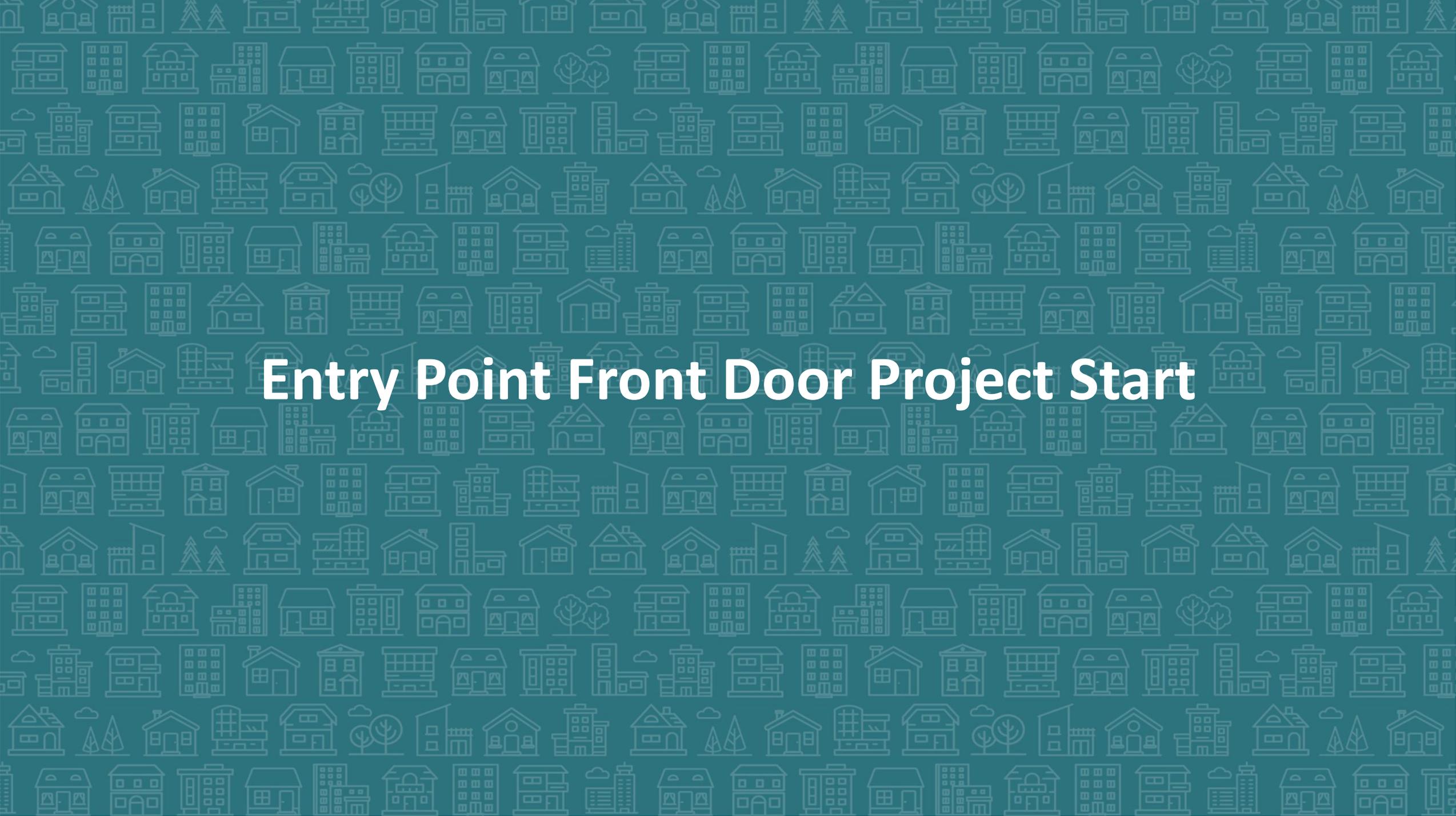
Not on sex offender registry or currently suspended from shelter



# Entering Entry Point Front Door project in HMIS

- **Step 1:** Change EDA mode to Front Door project and find the client profile
- **Step 2:** Create a Project Start on the Entry/Exit tab to record front door data and show interest in shelter referral
- **Step 3:** Connect with other front door agencies as needed to complete/assist in shelter referral
- **Step 4:** Create a Project Exit on Entry/Exit tab to remove from shelter waitlist if placed or no longer interested in placement





# Entry Point Front Door Project Start

# Shelter Options

Three shelter options:

1. CE-managed shelters (United Ministries of Durham, Families Moving Forward)
2. Special population shelters
3. Rescue mission



# Special population shelters

- Veterans
- Durham Access Care Transitions
- Durham Crisis Response Center (Currently fleeing DV)



# Record the interest in Shelter Waitlist in HMIS

Create/update Profile, Demographics, and Household (if needed) then add a new eROI for the Front Door project, and now Project Start in the Entry/Exit tab

**Client Information** | **Service Transactions**

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Measurements | Activities | Assessments

*i* Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit						
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
 CE Central - Durham County - VoA Front Door (7612)	HUD	 08/01/2019				 

Add Entry / Exit | Showing 1-1 of 1

# Add Data to Project Start

- Some data from other UCA projects will flow over like demographics, some homeless history, client resources, VI-SPDAT and contact information.
- Skip Diversion Questions and Durham CE Communication sub-assessment

Is there a home, apartment, or other housed situation where you can sleep tonight?  G

IF YES

How many more nights can you stay?  G

If you were forced to leave this location, what would the reason be?  G

IF NO

Why can't you stay at your current location tonight?  G

## Admin

Durham CE Communication					
	Start Date *	End Date	Contact Method	Contact Result	Contact Purpose
	05/10/2020		Phone	Able to contact	Bed placement and referral

# Durham Specific Data elements: Overview

Most of the data elements on the start assessment should be answered.

- Please see policies and procedures and/or guidebook for more specifics on individual questions

<b>Durham Specific Data element</b>	<b>UCA</b>
HARK screen	Answer
Homeless History	Answer
Diversion Questions	Skip
Reason for experience of Homelessness	Answer
Client Resources	Answer
Non-Cash Benefits	Answer
HOPWA Eligibility Screen	Answer
VA Diversion screen	Answer
Admin	Skip CE Communication, Answer the rest
Client Contact Information	Answer

# Durham Specific Data element: HARK Screen

Entry Point staff should screen all clients for experiences of violence using the modified HARK screen tool, below.

- Please see policies and procedures and/or guidebook for more specifics

Modified HARK Screen Tool	Yes	No
<b>Within the last year, have you or a member of your household been humiliated or emotionally abused in other ways by a partner or ex-partner?</b>		
<b>Within the last year, have you or a member of your household been afraid of a partner, ex-partner, or anyone else you lived with?</b>		
<b>Within the last year, have you been raped or has anyone forced you to have any kind of sexual activity?</b>		
<b>Within the last year, have you or a member of your household been kicked, hit, slapped, or otherwise physically hurt by a partner, ex-partner, or anyone else you lived with?</b>		



# Durham Specific Data element: Reason for Homelessness

Can select primary and secondary precipitating events

## Reason for Experience of Homelessness (if Category 1, 2, or 4 Homelessness)

What was the primary precipitating event that caused your experience of homelessness?	<input checked="" type="checkbox"/> Inability to Pay
If precipitating event is "other," please specify:	<input type="checkbox"/> -Select- <input type="checkbox"/> Aged Out of Foster Care <input type="checkbox"/> Change in Household Composition <input type="checkbox"/> Domestic Violence <input type="checkbox"/> Eviction <input type="checkbox"/> Family Conflict/Disruption
What was the secondary precipitating event that caused your experience of homelessness (if applicable)	<input checked="" type="checkbox"/> Inability to Pay <input type="checkbox"/> Incarceration <input type="checkbox"/> Kicked Out by Family Member <input type="checkbox"/> Kicked Out by Friend <input type="checkbox"/> Medical Crisis <input type="checkbox"/> Mental/Behavioral Health Crisis <input type="checkbox"/> Natural Disaster <input type="checkbox"/> No Longer Habitable (not Natural Disaster) <input type="checkbox"/> Other (specify below) <input type="checkbox"/> Other Violence (not DV) <input type="checkbox"/> Reasonable Accommodation (for Health Issues) <input type="checkbox"/> Release from Institution (not Incarceration)
(Retired)	

# Durham Specific Data element: Medically Vulnerable

The following categories of households should be identified as medically vulnerable

- Households with children under the age of 5
- Households with members above the age of 60
- Households with people with disabilities (identified by receipt of SSI/SSDI or other documentation)
- Households with people receiving medical treatment requiring supplemental machinery/equipment or electricity such as oxygen, nebulizer, cpap, motorized wheelchair, access to refrigeration for insulin.
- Households with people receiving active current treatment that is debilitating such as dialysis, or radiation/chemotherapy.
- Households with a pregnant member of the household



# Durham Specific Data Element: Shelter Waitlist Priority

Experiencing Category 1 or 4 Homelessness	Has a medical vulnerability + Durham resident	1
	Durham resident	2
	Has a medical vulnerability + NOT Durham resident	3
	NOT Durham resident	4
Experiencing Category 2 Homelessness	Durham resident	5
	NOT Durham resident	Refer to home CoC

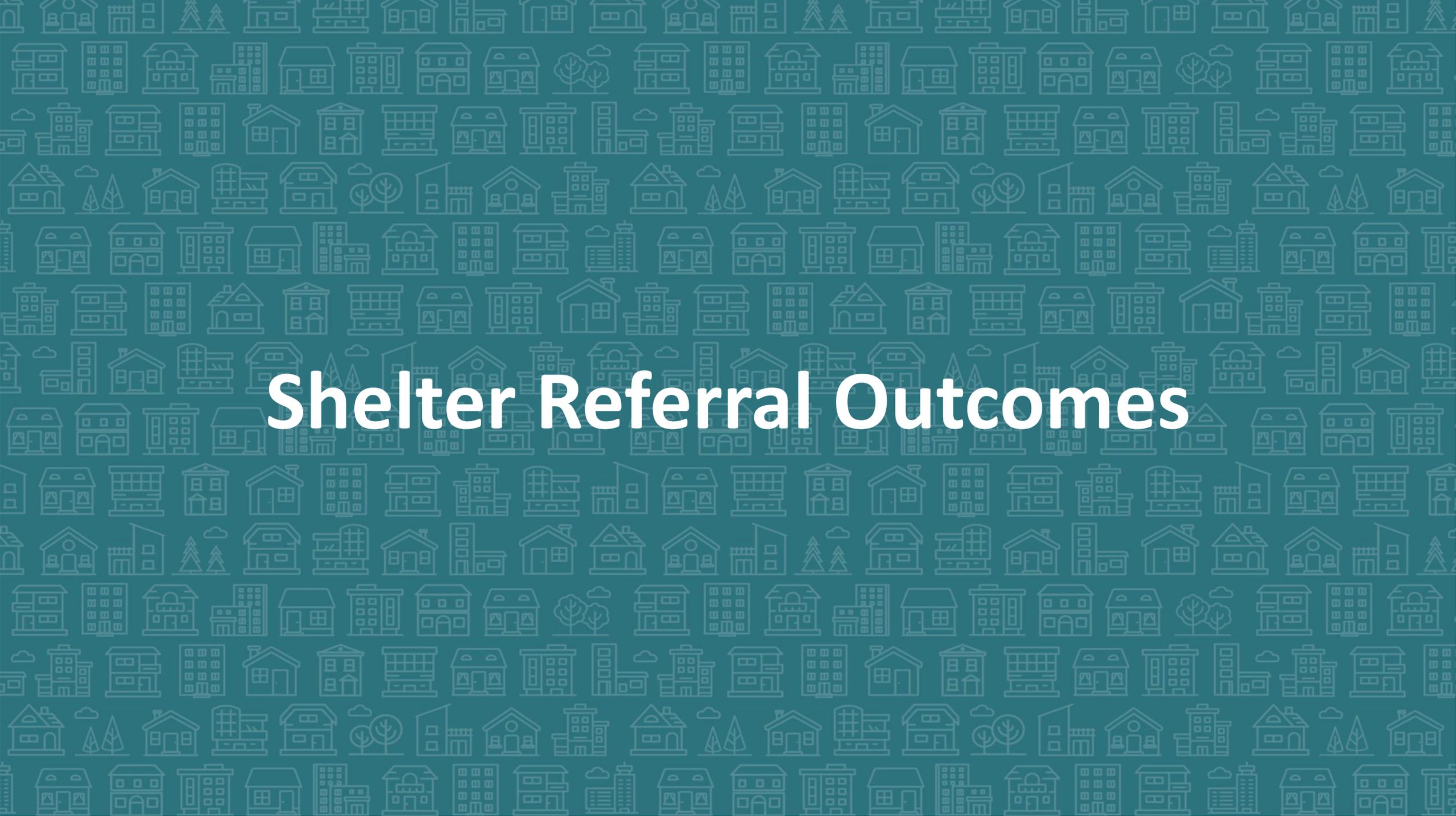


# If there are not beds available, Entry Point will maintain a waitlist.

Shelter waitlist will be prioritized:

Experiencing Category 1 or 4 Homelessness	Has a medical vulnerability + Durham resident	1
	Durham resident	2
	Has a medical vulnerability + NOT Durham resident	3
	NOT Durham resident	4
Experiencing Category 2 Homelessness	Durham resident	5
	NOT Durham resident	Refer to home CoC





# Shelter Referral Outcomes

# Referral outcomes

Outcome	Shelter Action	Entry Point Action	Entry Point HMIS Action	Client Action
Successful referral	Resolve referral in HMIS	See HMIS action	Exit client in HMIS	None
Shelter declines	Resolve referral in HMIS, Email Entry Point	Attempt to find more appropriate shelter option for client	Send another referral	Keep in contact with Entry Point
Client declines	Resolve referral in HMIS, attempt to find another shelter option, Email Entry Point	Follow up within 24 hours;	Mark decline in HMIS	Keep in contact with Entry Point
Client no-shows	Resolve referral in HMIS, Email Entry Point	Attempt to contact same day; If no contact, send new referral;	Mark attempts to contact in HMIS; exit if client has housing plan	Contact Entry Point by 10pm next day

# Shelter intake no shows will also need to be managed on the waitlist.

No show with a housing plan for the night	Remove from the waitlist
No show with no housing plan	Add/keep on waitlist Told to contact Entry Point the next day If no contact, remove from waitlist at 10 PM the day after no show
No show with no contact with Entry Point	Attempt to contact the following day Add/keep on waitlist If contact, refer to shelter If no contact, remove from waitlist at 10 PM the day after no show
Client is a no show 3 days in a row	Remove from waitlist Client will have to come back to Entry Point for a new intake





# Entry Point Front Door Project Exit

# Add Project Exit when appropriate

Create Project Exit when placed in shelter or no longer interested in placement

- Add Reason for leaving and Destination
- Edit and update other data elements as appropriate in directions

**Client Information** | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Measurements | Activities | Assessments

*i* Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit						
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
 CE Central - Durham County - VoA Front Door (7612)	HUD	 08/01/2019				 

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# Add Project Exit when appropriate

## If Diversion IS Successful:

Housing Assessment at Exit	<input type="text" value="Moved to new housing unit"/>
Length of housing solution (estimate)	<input type="text" value="More than four months, but less than one year"/> G
Was financial assistance used in diversion?	<input type="text" value="No Financial Assistance used"/> G
If the household has children under 18, was child safety assessed?	<input type="text" value="Yes"/> G

## If Diversion IS NOT Successful

Referred to:	<input type="text" value="-Select-"/> G
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## Complete for EVERY Head of Household

What housing barriers does the client still face?	<input type="text" value="low income"/> G
Housing Assessment Disposition (Coordinated Assessment)	<input type="text" value="Other/specify"/> G
If Other Housing Assessment Disposition, specify (Coordinated Assessment)	<input type="text" value="Can't locate client"/> G



## 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



NCCEH