1.0 Overview

Entries and Exits are some of the most important data entry tasks in HMIS. Without an entry, funders will not be able to see that a particular client is working with your program at all, nor what their current situation is. Without an exit, no one can tell, how quickly you are able to serve a client's needs, nor whether or not you are still working with and able to provide updates about a client.

Everything in this section takes place on the Entry/Exit tab of a client's file, as do the instructions about interims and follow-ups. It is likely that you will perform a program entry, then later do an interim review on that entry, then do an exit followed by a follow-up. Depending on circumstances some of these steps may not be necessary, but you should always check to make certain.

2.0Work Instructions

1.0 Program Entry/Intake

a. You will make a program entry whenever a client enrolls in one of your agency's programs.

b. When you add a program entry, you are required to fill out all information in the entry assessment, described below. The only programs excepted from this rule are Outreach providers, and then only in certain circumstances.

1.1 Fill out Entry information

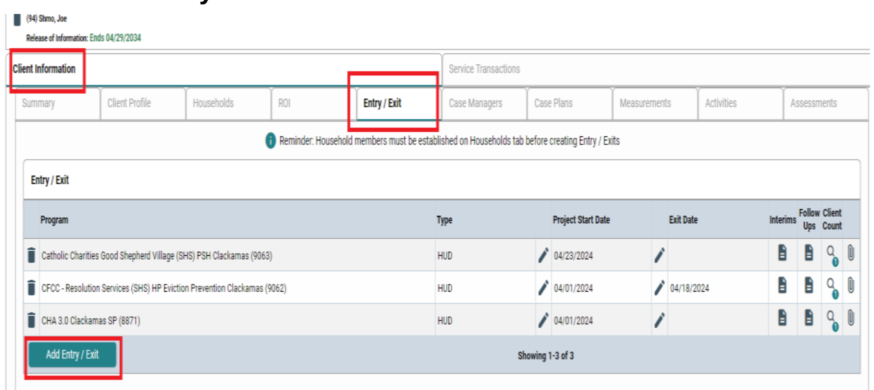
a. Navigate to Entry/Exit tab of client's file and click, **Add Entry/Exit**.

b. Select all clients who should be in this Entry from the client's household.

c. Change **Provider** to the specific program where the client is currently enrolling. (For example, do not leave as "AntFarm - Agency Admin – Clackamas" but change to "AntFarm (CGF) RRH Clackamas" if the client is getting Rapid Rehousing assistance)

d. Answer **Type** with **HUD** in almost all cases.

1.1 Fill out Entry Information



e. Providers which have “(YEHP)” as part of their names will choose **RHY** for Type instead

f. The date on which the client started working with the selected provider will be the **Project Start Date**.

g. Click **Save & Continue**

1.2 Troubleshooting “No Assessment”

a. If the message, “No assessment has been specified for this provider” appears, do not close the window.

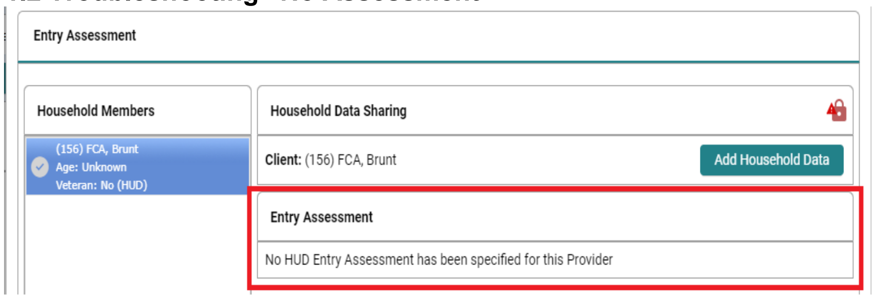
b. This indicates an incorrect Type or Provider selection.

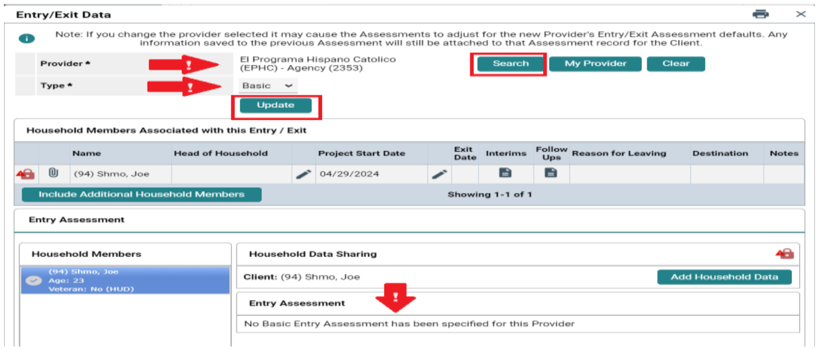
c. Scroll to the top of the entry, make all necessary corrections, select **Update**.

d. **Important**: Unless your provider has the abbreviation, YEHP in its name, your Type with be **HUD**.

e. **Important**: the provider for your entry should not have the word “Agency” in it, but will have the specific program type the agency will be providing to client to the client.

1.2 Troubleshooting “No Assessment”





1.3 Demographics Questions

Within the Entry, the first group of questions for client demographics. Even though these questions are also on the Client Profile tab, you must complete them as part of this assessment.

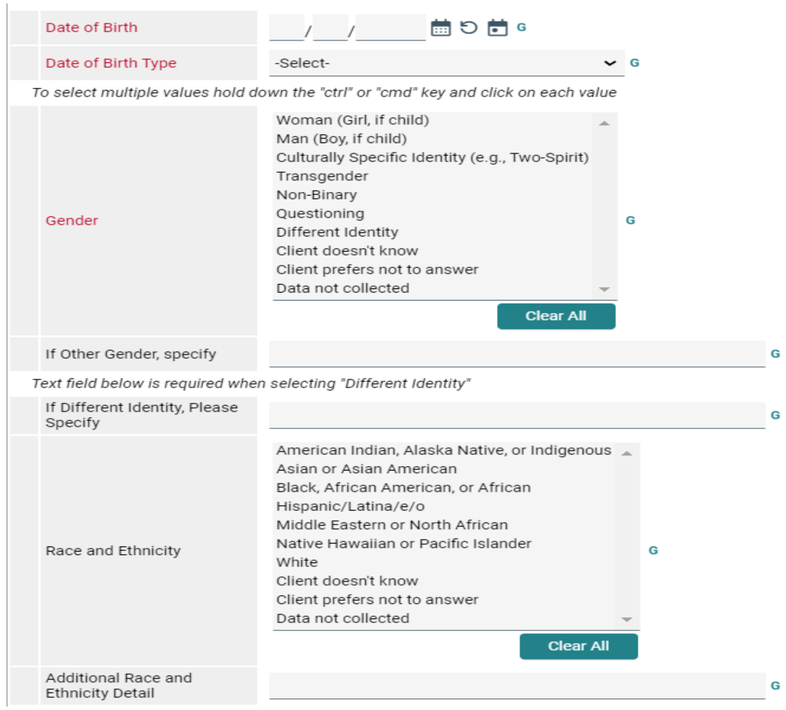
The questions in this section are:

- Date of Birth and Date of Birth Type
- Gender
- Race and Ethnicity

a. All questions must be answered if applicable.
   - A client may select "prefer not to answer" to any question, which is a valid answer.

b. **Gender** and **Race and Ethnicity** are answered the same way: ask clients to identify their gender and race, then select as accurately as you can.
   - Holding the CTRL key (Command key if using an Apple product), multiple options can be selected.
   - Free text fields are available when no option is a best match.
   - Select **Clear all** to unselect options in the list above the button, to make new selections or corrections.

1.3 Demographics Questions


Date of Birth ___/___/______ G
Date of Birth Type -Select- G
To select multiple values hold down the "ctrl" or "cmd" key and click on each value
Gender: Woman (Girl, if child); Man (Boy, if child); Culturally Specific Identity (e.g., Two-Spirit); Transgender; Non-Binary; Questioning; Different Identity; Client doesn't know; Client prefers not to answer; Data not collected G
Clear All
If Other Gender, specify G
Text field below is required when selecting "Different Identity"
If Different Identity, Please Specify G
Race and Ethnicity: American Indian, Alaska Native, or Indigenous; Asian or Asian American; Black, African American, or African; Hispanic/Latina/e/o; Middle Eastern or North African; Native Hawaiian or Pacific Islander; White; Client doesn't know; Client prefers not to answer; Data not collected G
Clear All
Additional Race and Ethnicity Detail G

1.4 Bookkeeping Questions

This set of questions **must** be answered for all household members, even if no other information at time of intake for the clients. **No exceptions.**

a. The questions in this section are:
   - Household Size
   - Relationship to Head of Household
   - Enrollment CoC
   - Translation Assistance Needed (and follow-up questions)

b. Each household may only have one (1) person who answers "Self (Head of Household)" for **Relationship to Head of Household**

c. The answer to **Enrollment CoC** will *always* be "OR-507 Clackamas County CoC".

1.5 HUD Verification Tables

a. HUD Verification Tables consist of four items: Health Insurance, Disabilities (AKA Health Conditions), Monthly Income, and Non Cash Benefits.

b. All household members must have these tables completed.

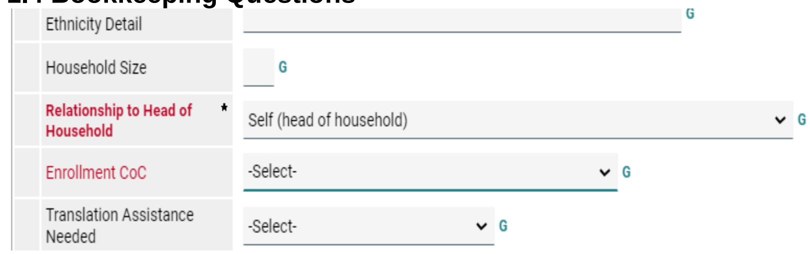
c. Household members under the age 18 are only required to complete Health Insurance and Disabilities when they are also the Head of Household (see 1.4)

d. Each category has a "gateway question" which must be answered first.

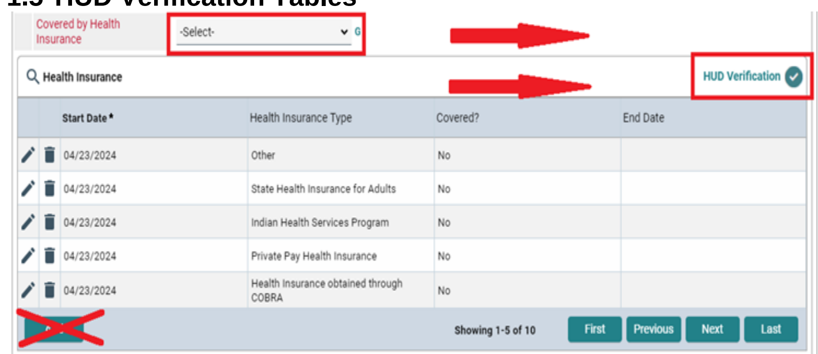
e. **DO NOT CLICK "ADD"**. Scroll screen to the right to see a link called "HUD Verification" with either a warning sign or a checkmark. **Click** on the **HUD Verification** link.

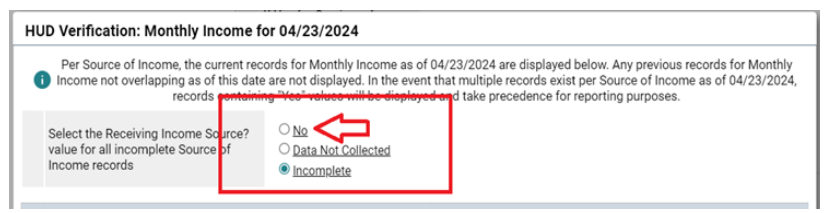
f. From the pops up, a list of Health Insurance types, health conditions, income, or benefits.

1.4 Bookkeeping Questions



1.5 HUD Verification Tables





Each Item must have a Yes or No response to clear the warning.

g. If a response is changed from No to "Yes" a pop-up warning will appear. These are skip-able, except for **Monthly Income**. An estimate of **Monthly Amount** for must be entered to clear the warning.

h. Click **Save & Exit**

i. An item table is complete when the Warning Sign on the right will be replaced with a Checkmark.

1.6 Client History

Required for HoH and **Adults Only**, and describe the client's history of homelessness, as well as other sensitive questions about their past.

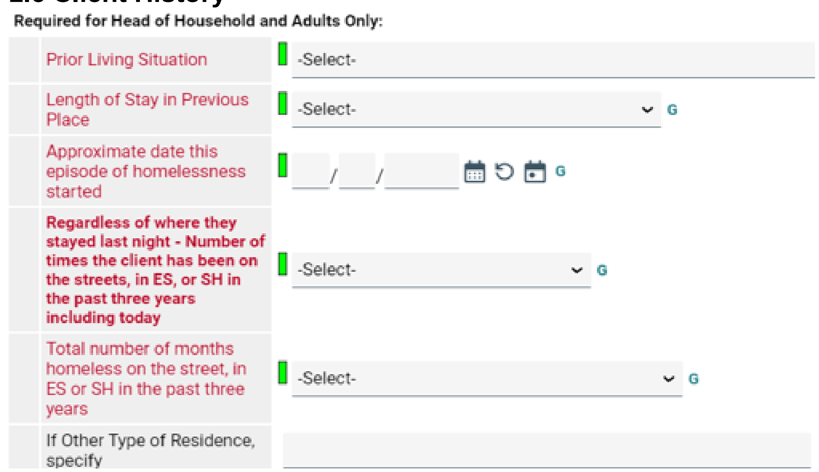
a. Ask these in a quiet place where a client can feel safe and with a reasonable amount of privacy. Others may overhear responses, potentially leading to harassment or violence.

b. If a client refuses to answer a question, **select** "Client prefers not to answer".

c. Common questions in this section:
- Prior Living Situation
- Length of stay in previous place
- Approximate date this episode started
- Number of times homeless in past 3 years
- Number of months spent homeless in past 3 years
- Last grade completed
- Sexual orientation
- Survivor of DV (and follow-up questions)

d. For **Prior Living Situation** enter the location where the client slept last night (or the night before they came to your program).

1.6 Client History


Required for Head of Household and Adults Only:

Prior Living Situation	-Select-
Length of Stay in Previous Place	-Select-
Approximate date this episode of homelessness started	/ /
Regardless of where they stayed last night - Number of times the client has been on the streets, in ES, or SH in the past three years including today	-Select-
Total number of months homeless on the street, in ES or SH in the past three years	-Select-
If Other Type of Residence, specify	

e. An episode of homelessness, when answering **Number of times homeless in the past 3 years**, means at least one (1) night spent homeless on the street, in an emergency shelter, or in a hotel/motel with a voucher.

f. An episode of homelessness continues until a client spends at least seven (7) nights in a residential building with electricity and running water.

g. If a client spends even a single night of a month homeless, that whole month will be counted towards the total for **Number of months spent homeless in the past 3 years**.

h. **Sexual Orientation**
Inform clients this is asked of everyone to ensure quality and services meet everyone's needs. A client can refuse to answer this question if they do not feel comfortable discussing it. Select or type what the client tells you, putting "Client prefers not to answer," if they do not want to discuss this with you.

i. **Survivor of Domestic Violence** Do not ask a client in front of their partner, as this could be dangerous or make it difficult for clients to respond honestly. If a client answers, "Yes" to this question, and indicated are actively concerned or trying to escape, offer to connect with Clackamas Women's Services.

1.6 Final Questions
After Non-Cash Benefits HUD Verification, is a set of questions that you do not directly ask the client. Instead, you will use the client's previous responses to complete.

a. Common questions in this section:

1.6 Final Questions

- Percent of Median Family Income
- SHS Priority Population
- Level of Family Income (% HHS Guidelines)

b. To answer **Percent of Median Family Income**, look at the table found on: https://www.clackamas.us/housingauthority/section8.html

c. To answer **Level of Family Income (%HHS Guidelines)**, look at the table found on: https://www.healthcare.gov/glossary/federal-poverty-level-fpl/

d. To answer SHS Priority Population, see [Population A&B Reference Guide].

1.7 Additional Household Members

a. On the left side of the screen, you will see that one client's name is highlighted blue.

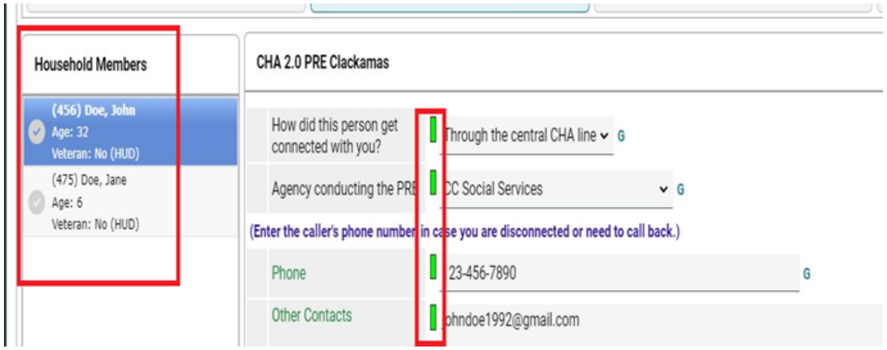
b. All of the questions that you fill out will be answered for this client.

c. Scroll back up to the top of the screen, select the next client, and answer questions for them.

d. Youth (under 18) who are not HoH, only need to be filled out up through the Disabilities subassessment.
e. Repeat steps a-d until all clients on the entry have completed assessments.

f. The color bar next to each question indicates how old the response is, from bright green (very new) to red (old). Clicking on the bar will show you who has updated the answer to that question previously.

1.7 Additional Household Members



2.0 Program Exits

a. A Program Exit tells HMIS that a client and their household are no longer actively working with a particular program.

b. To add an Exit, navigate to the Entry/Exit tab of the client's file, and click on the second **Pencil Icon** next to the **Exit Date** column.

2.1 Fill out exit information

A pop-up window will ask for exit information.

a. You must enter a response to:
b. Household members
c. Exit Date
d. Reason for leaving
e. Destination

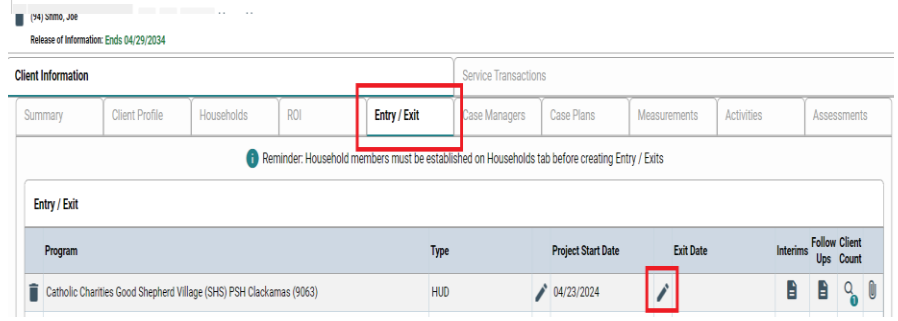
f. **Important**: select **all household members**, unless only certain household members are leaving the program (as in, the household is splitting up).

g. Enter an **exit date** when:
- Client is housed independent of the program
- No contact
- Moved into a Housing Program
- No longer met program eligibility
- Ended program for any other reason

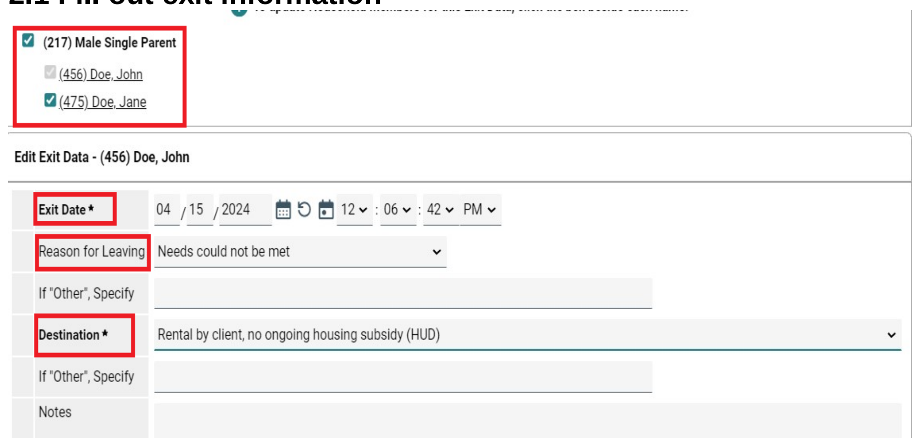
h. Select the best option for the situation.

i. Do not select any options that end with (HOPWA Only) for **reason for leaving**. The most common response will be

2.0 Program Exits



2.1 Fill out exit information



"completed program," but choose whichever one is appropriate.

j. **Destination:** See [Living Situations and Exit Destination Crosswalk]

Note: If you are unsure of which option to select. This is the living situation for the client *on the date entered above* for this exit. If the client is receiving rent support through a program or voucher, you will be prompted to select their **housing subsidy type**.

k. Click **Save & Continue**.

2.2 Exit Assessment

a. After you Save & Continue, most programs will see an assessment that looks similar to what you filled out for program entry.
b. If the person's situation has changed since their last Interim, you should update their information [See Interim Reviews instructions for how to update answers after project entry].
c. Click **Save & Continue**.

3.0 Resources

3.1 Referenced Material

- 2024 HUD Data Standards (linked)
- 2024 Living Situations & Exit Destination Crosswalk (Linked)
- 2024 Interim Reviews Work Instructions (Linked)
- Population A&B Reference Guide (Linked)

3.2 Related Material

- 2024 CoC Program HMIS Manual (linked)

3.3 Contacts

- HMISAdmin@clackamas.us (linked)