

Program Entries and Exits - HMIS Entry Instructions



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.

2.0 Work Instructions

1.0 Program Entry/Intake

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

- Navigate to Entry/Exit tab of client's file and click, **Add Entry/Exit**.
- Select all clients who should be in this Entry from the client's household.
- 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)
- Answer **Type** with **HUD** in almost all cases.

1.1 Fill out Entry Information

Client Information

Service Transactions

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

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

Program	Type	Project Start Date	Exit Date	Interim	Follow Ups	Client Count
Catholic Charities Good Shepherd Village (SHS) PSH Clackamas (9063)	HUD	04/23/2024				
CFCC - Resolution Services (SHS) HP Eviction Prevention Clackamas (9062)	HUD	04/01/2024	04/18/2024			
CHA 3.0 Clackamas SP (8671)	HUD	04/01/2024				

Add Entry / Exit

Showing 1-3 of 3

Program Entries and Exits - HMIS Entry Instructions



- 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.

Project Start Data - (456) Doe, John

Household Members

To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.

- (217) Male Single Parent
 - (456) Doe, John (Joined Household: 04/15/2024)
 - (475) Doe, Jane (Joined Household: 04/15/2024)

Project Start Data - (456) Doe, John

Provider * Coordinated Housing Access (CoC) CE Clackamas (4433) Search My Provider Clear

Type * HUD

Project Start Date * 04 / 15 / 2024 10 : 12 : 42 AM

Save & Continue Cancel

1.2 Troubleshooting “No Assessment”

Entry Assessment

Household Members

- (156) FCA, Brunt
 - Age: Unknown
 - Veteran: No (HUD)

Household Data Sharing

Client: (156) FCA, Brunt Add Household Data

Entry Assessment

No HUD Entry Assessment has been specified for this Provider

Entry/Exit Data

Note: If you change the provider selected it may cause the Assessments to adjust for the new Provider's Entry/Exit Assessment defaults. Any information saved to the previous Assessment will still be attached to that Assessment record for the Client.

Provider * El Programa Hispano Catolico (EPHC) - Agency (2353) Search My Provider Clear

Type * Basic Update

Household Members Associated with this Entry / Exit

Name	Head of Household	Project Start Date	Exit Date	Interims	Follow Up	Reason for Leaving	Destination	Notes
(94) Shmo, Joe		04/29/2024						

Include Additional Household Members Showing 1 of 1

Entry Assessment

Household Members

- (94) Shmo, Joe
 - Age: 23
 - Veteran: No (HUD)

Household Data Sharing

Client: (94) Shmo, Joe Add Household Data

Entry Assessment

No Basic Entry Assessment has been specified for this Provider

Program Entries and Exits - HMIS Entry Instructions



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	<input type="text" value="/ /"/> G
Date of Birth Type	-Select- G
<i>To select multiple values hold down the "ctrl" or "cmd" key and click on each value</i>	
Gender	<ul style="list-style-type: none"> 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 <div style="text-align: right;">Clear All G</div>
If Other Gender, specify	<input type="text"/> G
<i>Text field below is required when selecting "Different Identity"</i>	
If Different Identity, Please Specify	<input type="text"/> G
Race and Ethnicity	<ul style="list-style-type: none"> 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 <div style="text-align: right;">Clear All G</div>
Additional Race and Ethnicity Detail	<input type="text"/> G

Program Entries and Exits - HMIS Entry Instructions



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.**

- The questions in this section are:
 - Household Size
 - Relationship to Head of Household
 - Enrollment CoC
 - Translation Assistance Needed (and follow-up questions)
- Each household may only have one (1) person who answers “Self (Head of Household)” for **Relationship to Head of Household**
- The answer to **Enrollment CoC** will *always* be “OR-507 Clackamas County CoC”.

1.5 HUD Verification Tables

- HUD Verification Tables consist of four items: Health Insurance, Disabilities (AKA Health Conditions), Monthly Income, and Non Cash Benefits.
- All household members must have these tables completed.
- 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)
- Each category has a “gateway question” which must be answered first.
- 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.**
- From the pops up, a list of Health Insurance types, health conditions, income, or benefits.

1.4 Bookkeeping Questions

Ethnicity Detail	<input type="text"/>	G
Household Size	<input type="text"/>	G
Relationship to Head of Household *	Self (head of household)	G
Enrollment CoC	-Select-	G
Translation Assistance Needed	-Select-	G

1.5 HUD Verification Tables

Covered by Health Insurance G

Health Insurance ✓

Start Date *	Health Insurance Type	Covered?	End Date
04/23/2024	Other	No	
04/23/2024	State Health Insurance for Adults	No	
04/23/2024	Indian Health Services Program	No	
04/23/2024	Private Pay Health Insurance	No	
04/23/2024	Health Insurance obtained through COBRA	No	

Showing 1-5 of 10 First Previous Next Last

HUD Verification: Monthly Income for 04/23/2024

Per Source of Income, the current records for Monthly Income as of 04/23/2024 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 04/23/2024, records containing “Yes” values will be displayed and take precedence for reporting purposes.

Select the Receiving Income Source? value for all incomplete Source of Income records

No
 Data Not Collected
 Incomplete

Program Entries and Exits - HMIS Entry Instructions



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- G
Approximate date this episode of homelessness started	___/___/___ G
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- G
Total number of months homeless on the street, in ES or SH in the past three years	-Select- G
If Other Type of Residence, specify	

Program Entries and Exits - HMIS Entry Instructions



- 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	<input type="text" value="-Select-"/>	G
Identify the SHS Priority Population	<input type="text" value="-Select-"/>	

Program Entries and Exits - HMIS Entry Instructions



- 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

The screenshot shows the 'CHA 2.0 PRE Clackamas' interface. On the left, a 'Household Members' list is visible, with '(456) Doe, John' selected and highlighted in blue. The main area displays assessment questions for this client. A red box highlights the 'How did this person get connected with you?' question, which has a bright green progress bar and a dropdown menu set to 'Through the central CHA line'. Another red box highlights the 'Agency conducting the PR' question, which has a bright green progress bar and a dropdown menu set to 'CC Social Services'. Below these, there is a text input field for 'Phone' with the value '23-456-7890' and a green progress bar. At the bottom, there is an 'Other Contacts' field with the email 'ohndoe1992@gmail.com' and a green progress bar. A note below the phone field says '(Enter the caller's phone number in case you are disconnected or need to call back.)'.

Program Entries and Exits - HMIS Entry Instructions



2.0 Program Exits

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

- You must enter a response to:
 - Household members
 - Exit Date
 - Reason for leaving
 - Destination
- Important:** select **all household members**, unless only certain household members are leaving the program (as in, the household is splitting up).
- 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
- Select the best option for the situation.
- Do not select any options that end with (HOPWA Only) for **reason for leaving**. The most common response will be

2.0 Program Exits

194 simo_joe
Release of Information: Ends 04/29/2034

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | **Entry / Exit** | Case Managers | Case Plans | Measurements | Activities | 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
Catholic Charities Good Shepherd Village (SHS) PSH Clackamas (9063)	HUD	04/23/2024				

2.1 Fill out exit information

(217) Male Single Parent

(456) Doe, John

(475) Doe, Jane

Edit Exit Data - (456) Doe, John

Exit Date * 04 / 15 / 2024 12 : 06 : 42 PM

Reason for Leaving Needs could not be met

If "Other", Specify

Destination * Rental by client, no ongoing housing subsidy (HUD)

If "Other", Specify

Notes

Program Entries and Exits - HMIS Entry Instructions



“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)