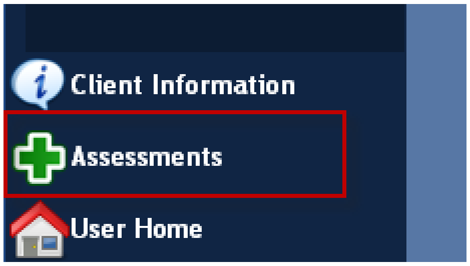
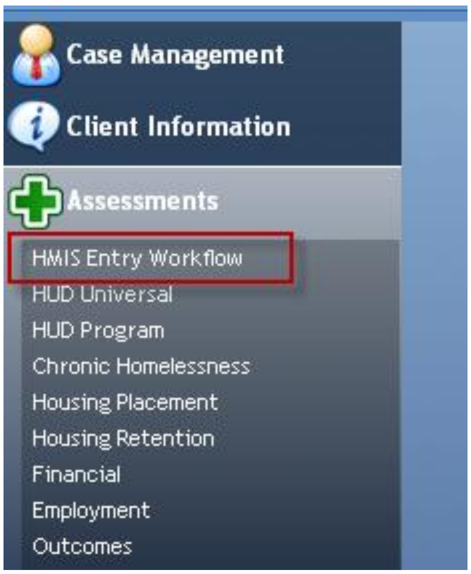
HMIS Entry Workflow Training Guide

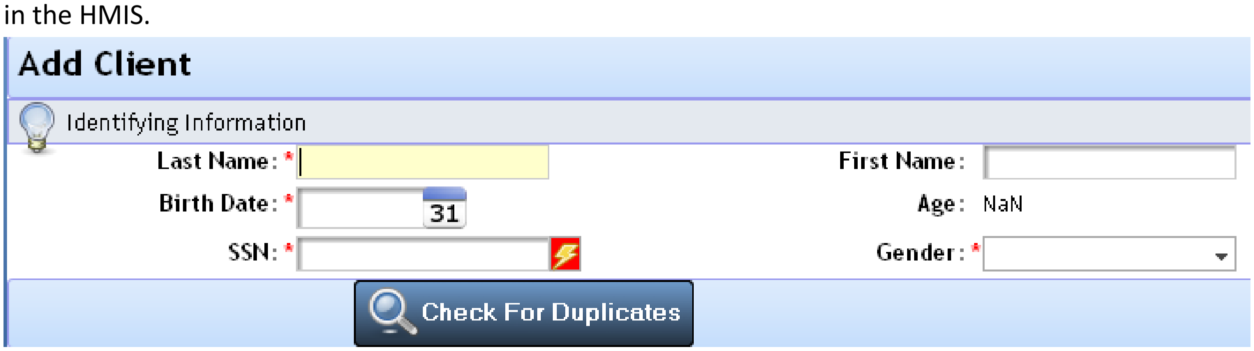
1. After logging in, then click on the Assessments menu group



2. Under Assessments, click the link, "HMIS Entry Workflow



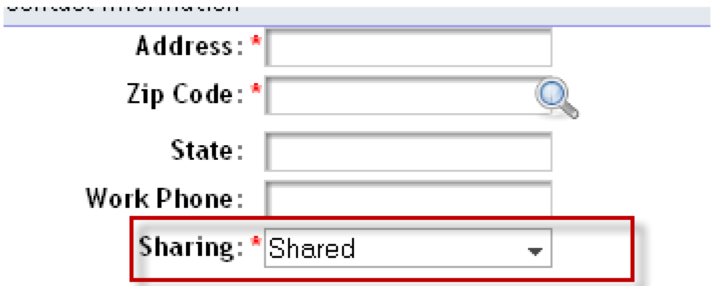
3. Enter a first name and last name and click "Check for Duplicates" to see if the client record exists in the HMIS.



4. If you find the client record, select the record and review the demographic information to ensure that it is accurate.

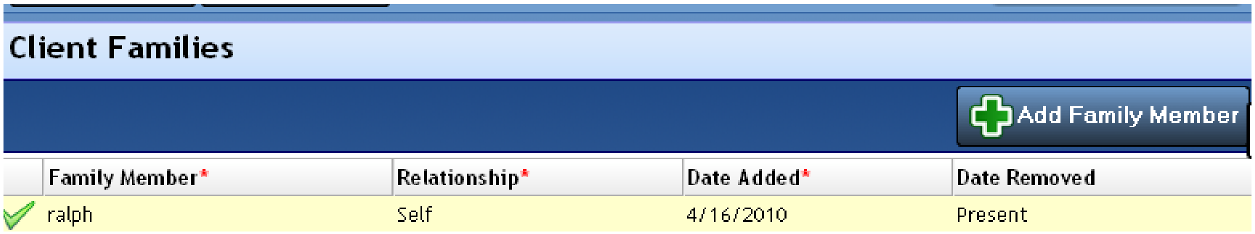
5. If the client record doesn't exist in the HMIS, select "This is a new client"

6. Under "Sharing," make sure that "Shared" is selected. This is very important! If you don't select "shared," other users can't see the record and will create new records. Only select "Not Shared" if the client refuses to sign the HMIS release.

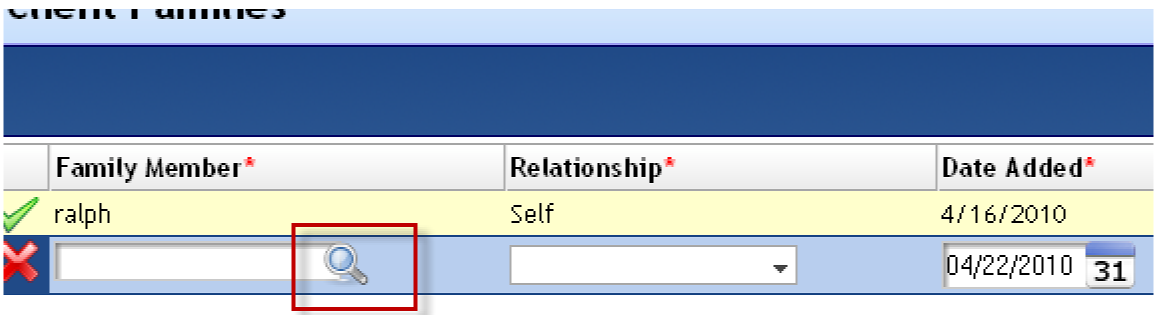


7. Workflow navigator: on the left you can view the remaining steps in the workflow. You can only access steps with green circles. Locked forms can't be accessed until you complete the prior steps in the workflow. The star represents the step you are currently on.

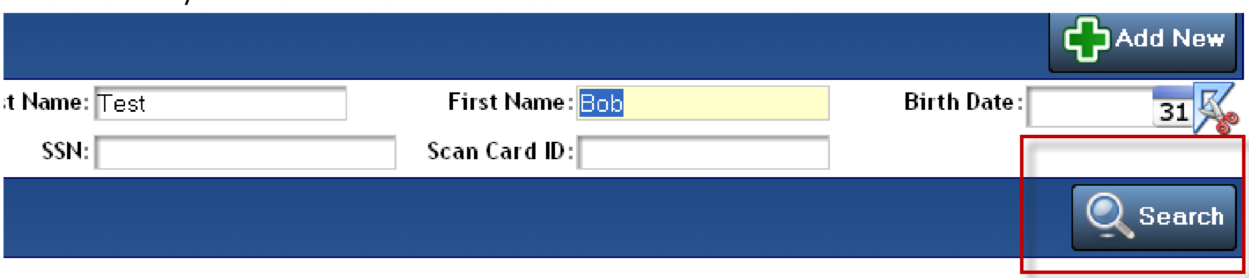
8. If you are completing an intake on a family, click "Add family member." If not, click save to proceed.



9. After clicking "Add new family." Click the look-up symbol to search for the family member's record



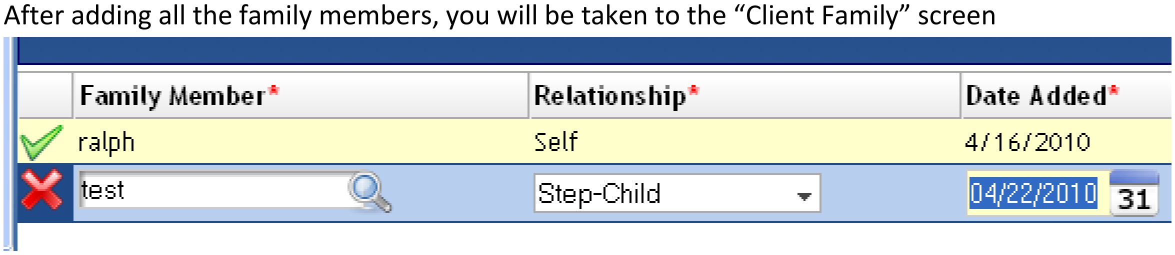
10. Enter the family member's name and click "Search."



11. If the record exists, select it. If not, click "Add new."

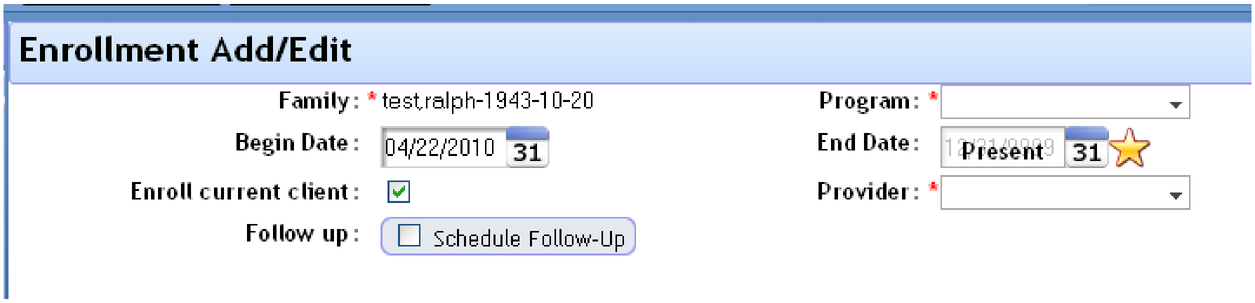
12. If you click add new, enter all the demographic info as instructed in the previous steps for the head of household.

13. After adding all the family members, you will be taken to the "Client Family" screen



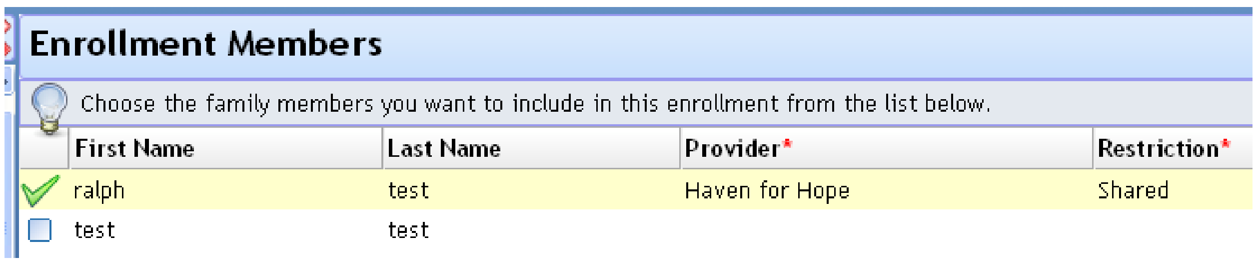
14. When you have finished adding all the family members, click save.

15. The next step is to enter the program you are enrolling the client into. Select the program and the provider and click save



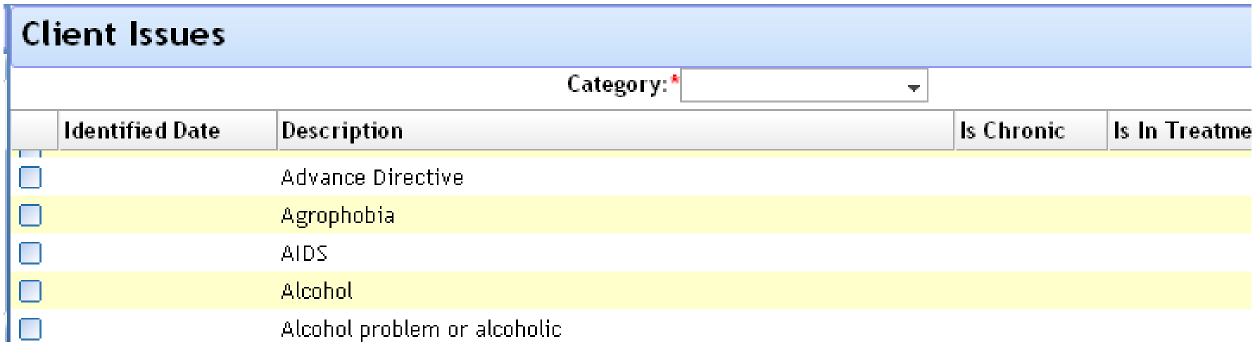
Important Note: The program you select will determine the subsequent forms required to complete to successfully enroll the client.

16. After selecting the program enrollment, choose the clients that you would like to enroll in the program.

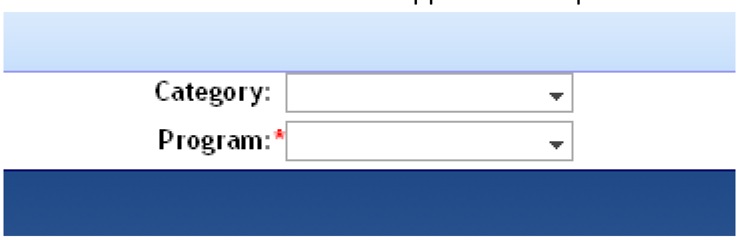


17. The assessments required for the enrollment will be added as steps to the workflow after you select which family members you would like to enroll

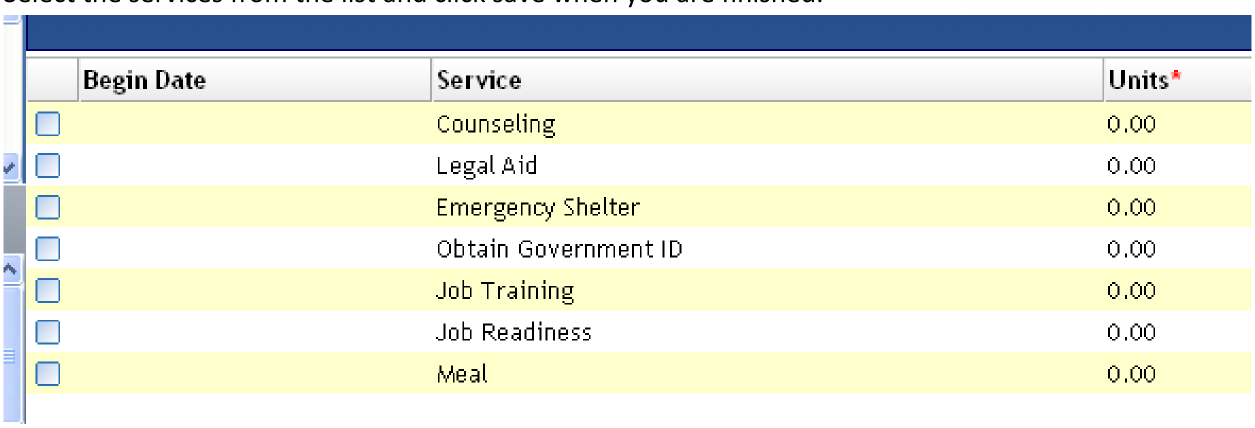
18. After completing the required assessments for the enrollment (some just require one extra form), you will need to select the "Presenting Issues" (formerly known as "Barriers"). Select a list from the category drop-down to narrow the list of issues to choose from. Click each issue the client has, and click save when finished.



19. Client Services- Select the program from the program drop-down list. The program that you will select will drive the services that appear in the spreadsheet.



20. Select the services from the list and click save when you are finished.



21. Review of workflow: When all the steps are completed, a screen will appear informing you if all the steps have been completed.

HMIS Entry Workflow (good) is now complete.

Status	Step Name	Completed By	Completed Date
	Add Client	shaun	4/22/2010 8:14:00 PM
	Client Families	shaun	4/22/2010 8:14:00 PM
	Enrollment Add/Edit	shaun	4/22/2010 8:14:00 PM
	Enrollment Members	shaun	4/22/2010 8:15:00 PM
	Assessment	shaun	4/22/2010 8:15:00 PM
	test, Jill		
	HUD Universal Data	shaun	4/22/2010 8:14:35 PM
	HUD Program Assessment (Input)	shaun	4/22/2010 8:14:43 PM
	Chronic Homelessness (Input)	shaun	4/22/2010 8:14:54 PM
	Client Issues	shaun	4/22/2010 8:15:00 PM
	Service Spreadsheet (2)	shaun	4/22/2010 8:19:00 PM