

## HMIS Client Entry Flow & Reminder List

1. ClientPoint screen
  - a. Search the client name and SSN.
  - b. If a match is found, click on the blue name link.
  - c. If no match is found click ~~A~~Add Client With This Informationq
  
2. Client Profile screen
  - a. Complete ~~S~~SN Data Qualityq
  - b. Do you need to ~~B~~ack Dateqthe assessment?
  - c. Complete the additional profile info.
  - d. Do you need to enter a household?
    - If backdating be sure to back date the ~~D~~ate Enteredqfor each household member.
  
3. Assessment screen
  - a. Complete all assessment fields.
  - b. Do you need to enter any disabilities?
  - c. Complete the income assessment (CoC grantees only).
  
4. Service Transactions screen
  - a. Select the proper ~~P~~roviderqor program.  
(This applies to users entering for multiple programs only)
  - b. If backdating, be sure to back date the ~~D~~ate of Need / Diagnosisq
  - c. Are you serving a family? Did you select the household members to be included in the need or service?
  - d. If entering on the single service screen, did you complete ~~O~~verall Outcomeq
  
5. Entry
  - a. Select the proper Provider or program.  
(This applies to users entering for multiple programs only)
  - b. Select the proper ~~E~~ntry Typeqfor your program.
  - c. If backdating, be sure to backdate the ~~E~~ntry Dateq
  - d. Are you serving a family? Did you select the household members to be included in the entry?
  
6. Exit
  - a. Do you need to edit any service transactions to update the ~~O~~verall Outcomeq
  - b. Do you need to enter any supportive services in Service Transactions before you exit this client?  
(This applies mainly to S+C or any grantee whose client is receiving supportive services from other providers as match)
  - c. Complete the ~~E~~xit Dateq
    - ~~R~~eason for Leavingq
    - ~~D~~estinationq
    - ~~E~~nureq (CoC grantees only)
    - ~~S~~ubsidyq (CoC grantees only)