



HMIS 103: Entry/Exits and Service Transactions

Instructions: For this review assignment, you will use the ServicePoint training site and the same Client ID# you created in the HMIS 101 review assignment.

1. Entering a Household into a program

For this section of the assignment, you will log onto the TRAINING SITE and click on the Entry/Exit tab. You will create an entry into your program for your household. Be sure to pay attention to the specific type for program and provider you have chosen in the entry data box in order to see the correct assessment. Next, complete the program entry assessment for each household member. Be sure to add the Head of Household to the project's unit list located in ShelterPoint.

2. Complete Interim Review

Program Entry is when the individual is accepted into the specific project/program. Many times, individuals are not housed the same day. Complete an Interim Review to show housing move-in date. Remember to change the client's status from Category 1: Homeless to Stably Housed at the top of the assessment. Enter a move-in date at the bottom of the assessment. Complete for all family members. If information for health insurance, disabilities, income, or non-cash benefits has changed at all since project entry, record that here on the interim review when completing for housing move-in date.

3. Add yourself as Case Manager

Click on the Case Managers tab and add yourself as a case manager.

4. Create a Service for the Household

Next, under the Service Transactions tab, you will create and provide a Service for the client. Be sure to include all household members. Also, make sure that your Need is marked appropriately when you are indicating that the service has been provided.

5. Exiting a Household from a program

Lastly, you will click again on the Entry/Exit tab. You will be creating an exit record for the household to now exit them from your program. Click on the pencil beside the exit date, edit the exit data to show current housing destination, and complete the program exit assessment for each household member. Be sure to remove the Head of Household from the project's unit list in ShelterPoint.

Upon completion, email hmishelp@wvceh.org and indicate you have completed HMIS 103 New User Review, and ***include the Client ID# for the Head of Household***, so that it may be reviewed.

Remember to keep the Client information (ID#) in a secure place until the HMIS New User Review Series has been fully completed, reviewed by HMIS System Administrator, and you receive your LIVE SITE user license information.

HMIS New User Review Series must be completed within 30 days of this training, or you will have to re-take entire series.