

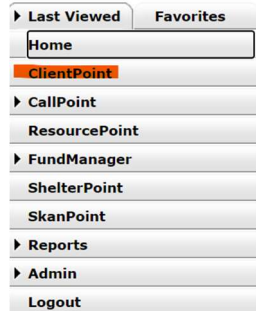


YEHP ENTRY/EXIT DATA ENTRY WORK FLOW

****This is the recommended method for entry/exit data entry****

Before creating a new client in HMIS, you want to search to see if that person is currently in HMIS. **OHCS HMIS team recommends this method for entry/exit data entry.**

1. After logging into HMIS, you want to go to the ClientPoint tab



2. After clicking onto the ClientPoint tab, you will be taken to the Client Search page

Client Search

Please Search the System before adding a New Client.

Name	First	Middle	Last	Suffix
Name Data Quality	-Select-			
Alias				
Social Security Number				
Social Security Number Data Quality	-Select-			
U.S. Military Veteran?	-Select-			
Exact Match	<input type="checkbox"/>			
Search ACTIVE Clients	<input checked="" type="radio"/>			
Search INACTIVE / DELETED Clients	<input type="radio"/>			
Search ALL Clients	<input type="radio"/>			

Search Clear Add New Client With This Information

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # Submit

Email the OHCS HMIS team with questions at OHCS.HMISHelp@hcs.oregon.gov

- Once there, you will want to search for the client you are needing to enter. You need to search for the client prior to entering them. Try searching by name. If the client isn't found that way, search by their social security number. If you still can't find them, you will want to 'enter new client.'

Search Clear Add New Client With This Information

Client Number

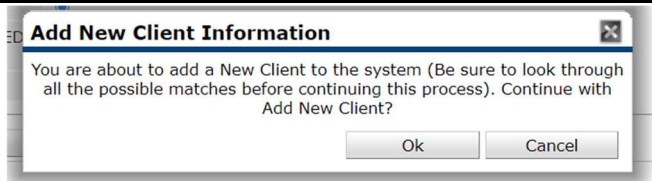
Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # Submit

Client Results

ID	Name ^	Social Security Number	Date of Birth	Alias	Gender	Banned	Household Count
No matches.							

You will get this message asking if you are sure you want to enter this new client:




If you are entering a new client, you will click the 'Ok' button and it will take you to the Client Information tab and the Summary tab:

(385) hat, amy
Release of Information: None

Client Information Service Transactions

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

Added to the system 06/28/2023 10:08 AM

Name hat, amy Social Security U.S. Military Veteran? 

Date of Birth
Gender
Primary Race
Secondary Race

Households **Entry/Exits**

ID	Type	Head of Household	Relationship	Program	Type	Project Start Date	Exit Date
Search Existing Households Start New Household				Add Entry / Exit No matches.			

Services **Shelter Stays**

Start Date	End Date	Provider	Start Date	End Date	Provider
Add Service Add Multiple Services No matches.			Start Date End Date Provider No matches.		

Exit

- If it is a single person household, you will want to click on the Entry/Exit tab. Once on the Entry/Exit tab, you will want to click on the 'Add Entry/Exit' button

Client Information Service Transactions

Summary Client Profile Households ROI **Entry / Exit** Case Managers Case

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

Entry / Exit

Program	Type	Project Start Date	Exit Date
Add Entry / Exit No matches.			

At this point you will search for the program provider you want to enter the client into:

Project Start Data - (385) hat, amy

Household Members

This Client is not a member of any Households.

Project Start Data - (385) hat, amy

Provider* Oregon Multi-Continuum <OMC> (8409) Search My Provider Clear

Type* -Select-

Project Start Date* 06/28/2023 10:12 AM

Project Start Data - (385) hat, amy

Provider* Jackson Street Youth - Ben - RHY - Street Outreach (5114) [ROCC] (5114) Search My Provider Clear

Type* -Select-

Project Start Date* 2:16 AM

- Basic
- Basic Center Program Entry/Exit
- HUD
- PATH
- Quick Call
- RHY
- Standard
- Transitional Living Program Entry/Exit
- VA

Save & Continue Cancel

Then select your start date. This date will be the date that you enter the client into your program.

5. This will then take you to the Entry Assessment. You will then go through and answer all the questions on this assessment. Then click 'Save and Exit' and the bottom right.
6. To exit a client, you will go back to your program entry/exit and select the pencil for exit

Entry / Exit						
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Jackson Street Youth - Ben - RHY - Street Outreach (5114) [ROCC] (5114)	RHY	06/15/2023				

Add Entry / Exit Showing 1-1 of 1

This will pull up basic a page for basic exit data:

Edit Exit Data - (385) hat, amy

Exit Date* 06/28/2023 10:42 AM

Reason for Leaving -Select-

If "Other", Specify

Destination* -Select-

If "Other", Specify

Notes

Once that page is completed, click 'Save & Continue'. This will take you to the same assessment you completed before, but you will need to review the data and make any updates. Once you have completed that, you will click 'Save & Continue'. Your client will now be exited from the program.

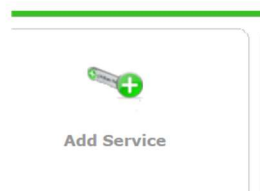
7. Service Transactions. These are used to track what you are providing for a household (single individual or multiple people).
 - a. Go to the Service Transactions tab

Client Information

Service Transactions

Summary Client Profile Households ROI Entry / Exit Case Managers Case Plans Assess

- b. You will then want to click on the dashlet that says 'Add Service'



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- c. You will again select the program you are entering the client into (same program as the entry/exit program), select the start date (this date always defaults to the current date. If you are entering a service from a previous date make sure and change the date) and then select the service type. Finally, select 'Save & Continue'

The screenshot shows a web form with the following fields and options:

- Service Provider***: Jackson Street Youth - Ben - RIV - Street Outreach (5114) [ROCC] (5114). Includes buttons for Search, My Provider, and Clear.
- Creating User**: Amy Hatfield
- Start Date***: 06/28/2023 10:33:45 AM. Includes a calendar icon and dropdown arrows for time.
- End Date**: Empty date field with a calendar icon and dropdown arrows for time.
- Service Type***: Street Outreach Programs (PHI-8000). Includes a Look Up button.
- Provider Specific Service**: -Select-

Buttons at the bottom right: Save & Continue, Cancel.

- d. Once you have completed the previous step, it will open up more options such as Apply Funds for Service if it is a service that you are providing financial assistance for. You can also fill out the Follow Up Information section as well. Once this page is completed, select 'Save & Exit.'