

## Contents

Overview .....	1
Case 1: Client has Case Management Services Only.....	3
Case 2: Client has no Services at all. ....	3
Case 3: A valid Enrollment exists without and Exit.....	3
Case 4: An invalid (extra) Enrollment exists without an Exit. ....	4
Case 5: Duplicate Client .....	5
Case 6: Orphaned Client. The client is not attached to a family.....	5

## Overview

Outcome Reporting depends on Exiting Clients from the Programs the Client is enrolled in. Sometimes Clients are not Exited as we expect. This Quick Reference Guide provides assistance with verifying the Client Exits. We have found a few different cases of Enrollments without Exit:

Case 1: Client has Case Management Services Only

Case 2: Client has no Services at all.

Case 3: A valid Enrollment exists without and Exit.

Case 4: An invalid (extra) Enrollment exists without an Exit.

Case 5: Duplicate Client

Case 6: Orphaned Client. The client is not attached to a family.

The instructions for correcting the information for the Clients are below.

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Submit a ticket in the HMIS  
Email us at: [hmis@computerhelp.biz](mailto:hmis@computerhelp.biz)  
Contact Computer Help at (850) 651-0341  
Contact Computer Help at (850) 259-4164

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Page 1

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June 30, 2011

Page 2

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## Case 1: Client has Case Management Services Only

## Case 2: Client has no Services at all.

## Case 3: A valid Enrollment exists without and Exit.

### Action

1. Find Client
2. On Dashboard
  - a. Check Enrollment.
    - i. Review the Enrollments and make sure they are exited from the HPRP program. Every member of the family needs to be exited if the client is exited.
    - ii. Identify Enrollment without Exit Date.
    - iii. Note the date and any other pertinent details. (You will be able to select this enrollment in the Exit workflow).
  - b. Check Assessments
    - i. Review the Assessment and make sure they have an Exit Assessment. Every member of the family should have their own assessment. Any enrollment without and attached assessment, will exclude the client or family member from the any HUD report.
    - ii. Click on Enrollments
    - iii. Click on the button next to the desired Enrollment
    - iv. Click on Exit Assessments.
  - c. Check Services
    - i. Identify what type of services the client has been provided.
3. Verify the number of Family Members
  - a. You can find this on the Client Dashboard in the Enrollment Entry
  - b. (see Training Handout – Steps to Verify the Families)
4. Verify the Family
  - a. Click on the Family Menu Item and review the Family assignment
5. Perform a HPRP Exit Workflow. This can be found in one of two places.
  - a. In the Quick Select Menu
  - b. In the HMIS Workflows Menu

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June 30, 2011

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## Case 4: An invalid (extra) Enrollment exists without an Exit.

### Action

1. Find Client
2. On Dashboard
  - a. Check Enrollment.
    - i. Identify Enrollment without Exit Date.
    - ii. Note the date and any other pertinent details. (You will be able to select this enrollment in the Exit workflow).
  - b. Check Assessments
    - i. Review the Assessment and make sure they have an Exit Assessment. Every member of the family should have their own assessment. Any enrollment without an attached assessment, will exclude the client or family member from the any HUD report.
    - ii. Click on Enrollments
    - iii. Click on the button next to the desired Enrollment
    - iv. Click on Exit Assessments.
  - c. Check Services
    - i. Identify what type of services the client has been provided.
3. Verify the number of Family Members
  - a. You can find this on the Client Dashboard in the Enrollment Entry
4. Verify the Family
  - a. Click on the Family Menu Item and review the Family assignment
  - b. (see Training Handout – Steps to Verify the Families)
5. Delete the Enrollment
  - a. Click on the Enrollments Menu Item
  - b. Click the button next to the Enrollment you want to delete
  - c. Select Delete
  - d. Confirm Deletion

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June 30, 2011

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## Case 5: Duplicate Client

## Case 6: Orphaned Client. The client is not attached to a family.

### Action

1. Find Client
2. On Dashboard
  - a. Check Enrollment.
    - i. Identify Enrollment without Exit Date.
    - ii. Note the date and any other pertinent details. (You will be able to select this enrollment in the Exit workflow).
  - b. Check Assessments
    - i. Review the Assessment and make sure they have an Exit Assessment. Every member of the family should have their own assessment. Any enrollment without and attached assessment, will exclude the client or family member from the any HUD report.
    - ii. Click on Enrollments
    - iii. Click on the button next to the desired Enrollment
    - iv. Click on Exit Assessments.
  - c. Check Services
    - i. Identify what type of services the client has been provided.
3. Verify the number of Family Members
  - a. You can find this on the Client Dashboard in the Enrollment Entry
4. Verify the Family
  - a. Click on the Family Menu Item and review the Family assignment
  - b. (see Training Handout – Steps to Verify the Families)
5. Mark Client for Deletion
  - a. Click the Edit Client Menu Item
  - b. Change the Last Name to start with DELETE
    - i. Example – “DELETE Smith”

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