Outreach/PATH: Project-Specific Workflow

Objective: Users will be able to understand and document the outreach required workflow

**Please note that expectations and guidelines may change. If you have any questions about any of the training content, please reach out to helpdesk@allchicago.org*

Table of Contents:

Workflow Overview

Contacts

Defined as an interaction between a worker and a client designed to engage the client.

Engagement

The date the client has agreed to complete an assessment to further assess their eligibility for services.

Exit

When the client stops participating in the project.

Contacts

Contacts are defined as an interaction between a worker and a client designed to engage the client.

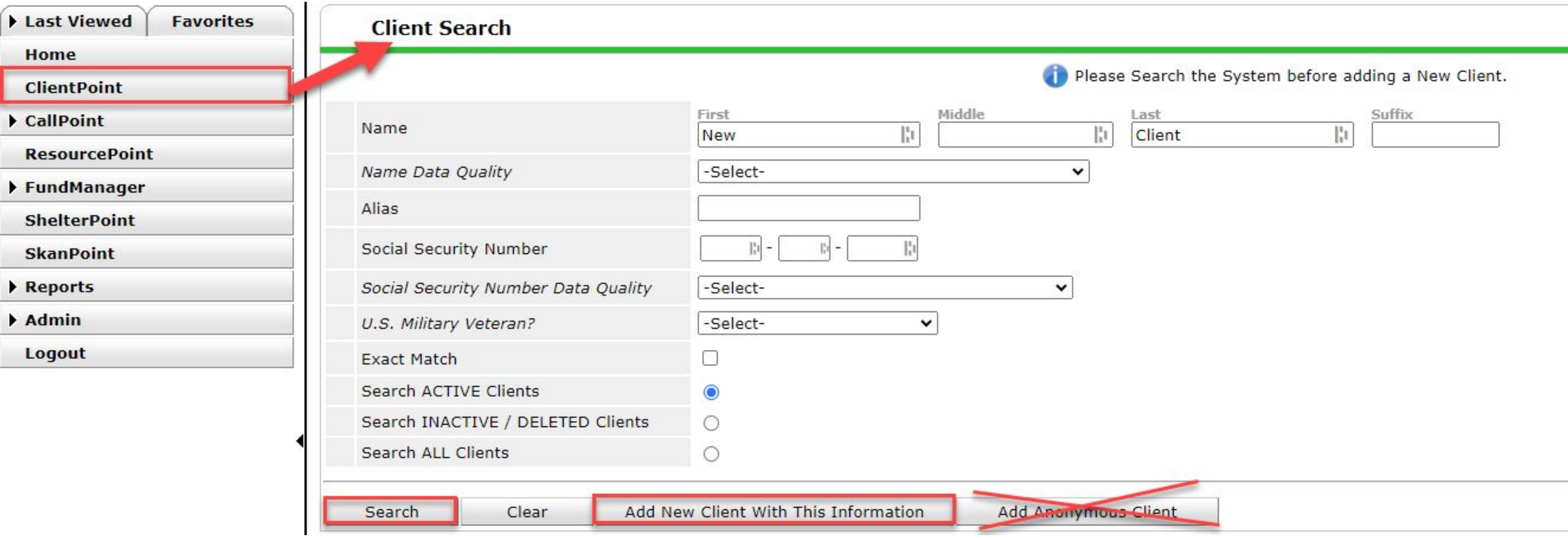
Examples:

- Conversations between worker and client about well-being and needs
- Visit to discuss housing plans
- Referral to other services

The following section walks through each step of how to document contacts in the HMIS.

Step 1: Navigate to Client Record

Follow standard procedures for completing a search through ClientPoint or creating a new record, which includes adding them to household.



Step 1: Navigate to Client Record

Sometimes clients are unwilling to provide a full name during the initial encounters. In these cases, the following naming conventions should be used to prevent record duplications, do not add anonymous clients.

First Name:

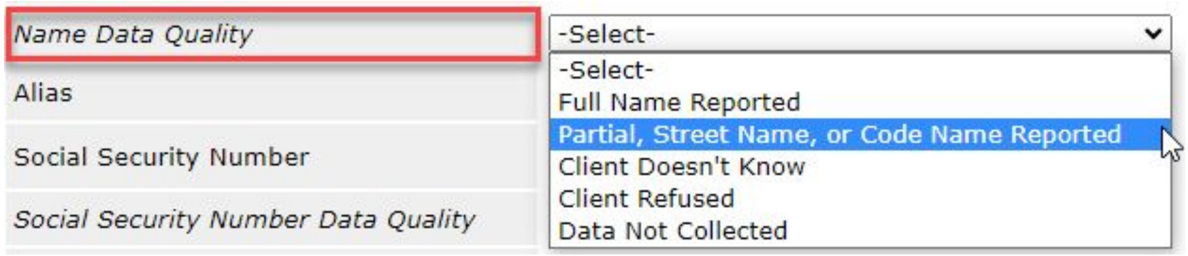
- If the client has given a first name or alias, input that first name or alias in the First Name field
- If the client has not provided a first name or alias, the First Name field should have the date of contact (written out with no space) and time (four digits) with am or pm designation

Last Name: Distinguishing characteristic or location (no space)

Examples -

- Client provided a first name of "Joe" and refused to share last name:
    - First Name: Joe; Last Name: HarrisonandHalsted
- Client refused to provide first or last name:
    - First Name: MaySixth0204pm; Last Name: RedHat

*When using a the naming convention or an alias, make sure to also select the appropriate option for the **Name Data Quality** question:



Step 2: Documenting the First Contact

When making the first contact with a client, a few main things need to be documented in the HMIS:

1. The client should be enrolled in the project on the date of the first contact.
2. Within the entry assessment, workers need to complete at least the following questions:
    - Relationship to the Head of Household
    - Location: IL-510

Relationship to Head of Household *	Self (head of household)	G
Client Location *	IL-510	G

- A Current Living Situation Entry that reflects the date and location of the first contact.

Current Living Situation

Start Date *	End Date	Information Date	Current Living Situation
04/01/2023		04/01/2023	Place not meant for habitation (HUD)

Add — Showing 1-1 of 1

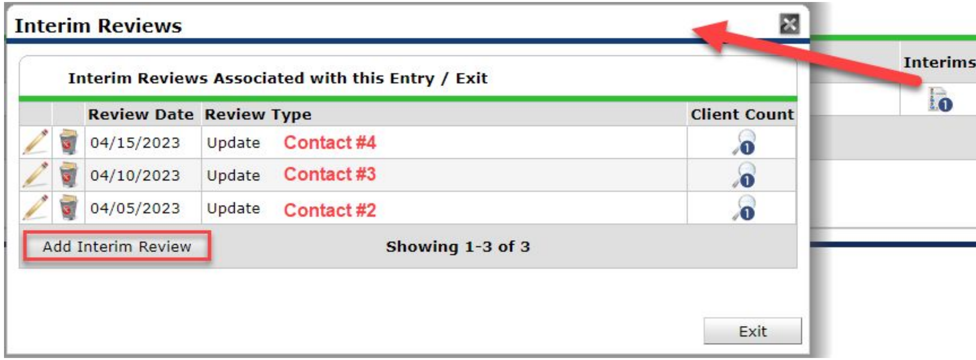
3. Although not required, prioritize collecting the following data from the client. These can be collected and entered in their entry assessment at any contact.

- Social Security Number (This is used to prevent record duplication)
- Date of Birth
- Demographic information
- Prior Living Situation
- Disabling Conditions

Step 3: Documenting Additional Contacts

Because of the timestamp nature of the HMIS, additional contacts should be entered through an interim review.

A new **interim review** should be added for each additional contact after the first until the date of engagement,



Interim Reviews

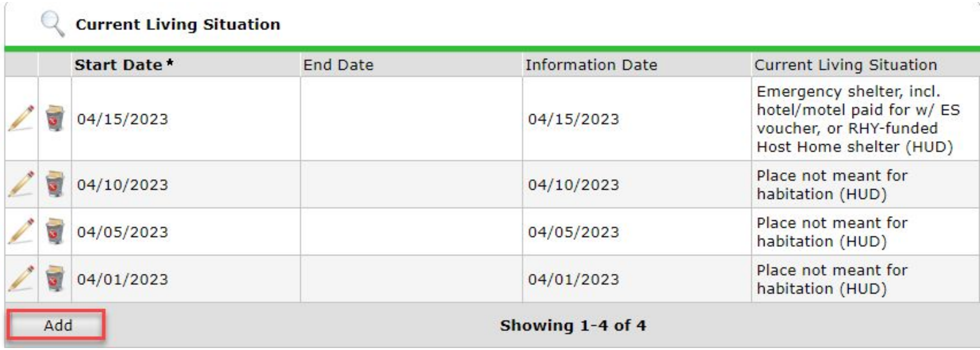
Interim Reviews Associated with this Entry / Exit

Review Date	Review Type		Client Count
04/15/2023	Update	Contact #4	
04/10/2023	Update	Contact #3	
04/05/2023	Update	Contact #2	

Add Interim Review — Showing 1-3 of 3

Exit

along with a corresponding **Current Living Situation entry** that documents the location and date of the contact,



Current Living Situation

	Start Date *	End Date	Information Date	Current Living Situation
Contact #4	04/15/2023		04/15/2023	Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)
Contact #3	04/10/2023		04/10/2023	Place not meant for habitation (HUD)
Contact #2	04/05/2023		04/05/2023	Place not meant for habitation (HUD)
Contact #1	04/01/2023		04/01/2023	Place not meant for habitation (HUD)

Add — Showing 1-4 of 4

and any of the previously listed priority Entry Assessment data.

Engagement

Engagement is when the client relationship has lead to them agreeing to complete a client assessment or develop a case plan.

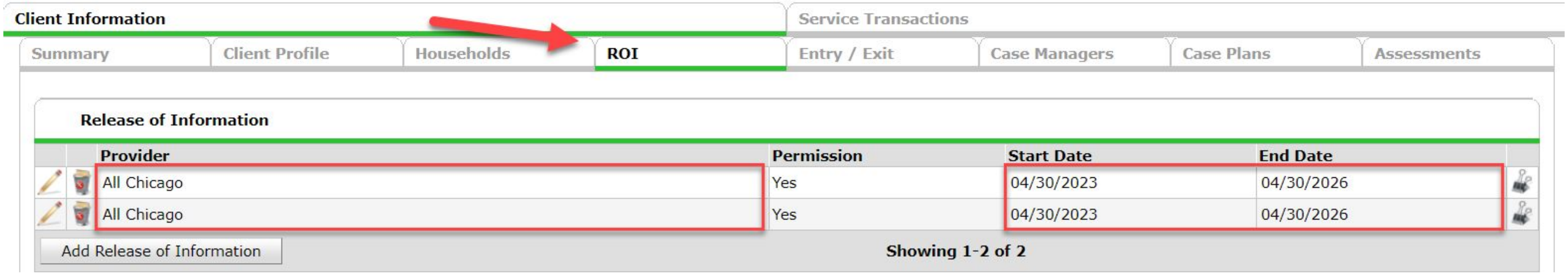
This is also when the process of **data quality expectations** begin.

The following section walks through each step of how to document engagement in the HMIS.

Step 1: Complete Release of Information (ROI)

Before enrolling any clients into a project, they should be provided with the Client Consent form to provide consent to agencies to share their data within the CoC.

The client's response to both consent forms should be documented in their record, with the effective dates as the date of engagement plus a agency-standard time frame, or 3 years:



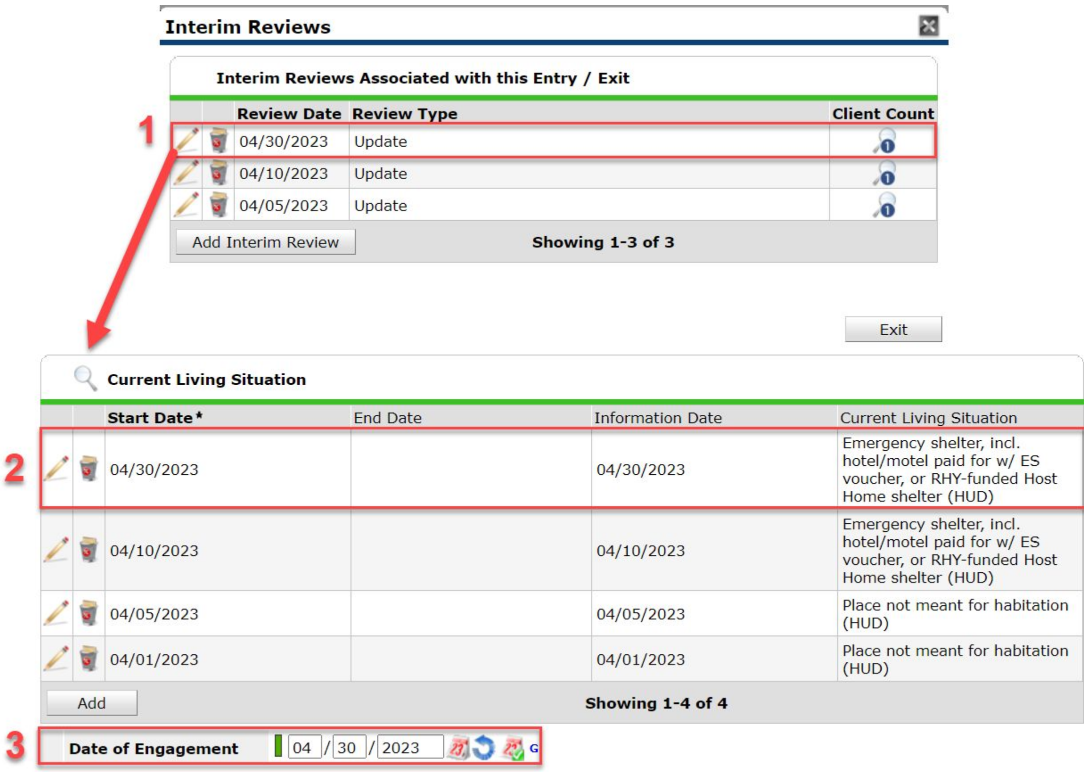
*Depending on the client's response or their situation, it might be necessary to lock their record as well.

Step 2: Document Contact and Date of Engagement

Document the contact's date and location by adding an **Interim Review (1)** and **Current Living Situation entry (2)**, as previously described in the last section,

AND

enter the **Date of Engagement (3)** in the following element.



Step 3: Complete the rest of the Entry Assessment

Exit the Interim Review and complete the rest of the Entry Assessment, if previously the worker was unable to collect all necessary information:

Entry / Exit

Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
All Chicago - Outreach Project (1499)	HUD	04/01/2023				

Add Entry / Exit

Showing 1-1 of 1

Project Exit

Project Exit is when the client stops participating in the project or receiving services from a project. The following section walks through each step of when and how to exit the client in the HMIS.

Reasons to Exit a Client

- The client has entered another project type (e.g., TH, PSH) or otherwise found housing;
- The client is engaged with another outreach worker or project;
- The client is deceased;
- The outreach worker has been unable to locate the client for an "extended period of time," *which is determined by your agency.*

Step 1: Enter an Exit Date

The exit date should be the date that the client has stopped receiving regular services or has met any of the previously listed reasons.

*** If unable to complete an exit assessment, then the date of last recorded Current Living Situation should be used as the exit date. However, according to the CoC's [Data Quality Plan](), clients should be exited no more than seven (7) days after their last contact.**

Therefore, for example, if a client was last contacted on 1/1, then in order to be compliant, the client has to be exited before 1/9.

SUN	MON	TUE	WED	THU	FRI	SAT
Client's last contact with agency						
	Client must be exited *before* this date. An exit on this date will be out of compliance.					

Step 2: Complete Exit Assessment

When possible, complete a final update of the client record by completing the Exit Assessment.

Workflow Summary

Contacts

Defined as an interaction between a worker and a client designed to engage the client.

HMIS Tasks:

- First Contact = Project Enrollment
- Current Living Situation entry
- Interim Review for each additional contact

Engagement

The date the client has agreed to complete an assessment to further assess their eligibility for services.

HMIS Tasks:

- Complete ROI
- Current Living Situation entry
- Document Date of Engagement
- Complete Entry Assessment

Exit

When the client stops participating in the project.

HMIS Tasks:

- Project Exit Date
- Current Living Situation entry

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