Unsheltered Provider Workflow for Balance of State

Task	Steps
1 Release of Information and Interview	a. Once contact has been made with the unsheltered client, determine if it is ok with the client that their Personally Identifying Information (PII) goes into HMIS.
	b. If it is, then have them sign the Ohio BoSCoC's HMIS Data Privacy Notice & Consent form. If not, then it is ok to enter the client, but do not enter any PII, including real name, SSN, date of birth, or gender.
	c. Prioritize getting Veteran Status, Disability, and the Length of Time Homeless questions.
	d. If client does not consent to data collection during the first contact, try again at each interview, but it is ok if they wish to remain unidentified in HMIS.
2 Log into HMIS, Create Client Profile	a. Go to http://www.servicept.com/odod
	b. Insert username and password
	c. Click "Enter Data As" and select the Unsheltered provider (1695).
	d. Click **ClientPoint**.
	e. Search for your client in the database. If the client is not found, click **Add Client With This Information**. If they are already in, click their record.
3 Household / Single	
A. If client already exists in HMIS	a. If the client is a single, skip to Step 4. If the client is in a household, check in the list of households in the Households dashlet on the Summary tab to be sure there is a household listed that matches exactly. If there is, skip to Step 4. If not, click Start New Household and skip to Step 3B.
B. If new client is part of a Household	a. Click **Add Client and Add NEW Household.**
	b. Select the appropriate Household Type. To add additional members of the household; stay in the household window, search and add each member, in turn, including their Name Data Quality, SSN and SSN Data Quality, and Veteran Staus. Click **Continue** when done.
	c. Select the Head of Household, identify other client Relationships, and make the Joined Household Date to be their Entry Date. Click **Save and Exit.**
C. If new client is an Individual	a. Click **Add Client Only**.
4 ROI	a. Click the **Summary** tab, and find the ROI dashlet.
	b. Click **Add ROI**. Check all household members.
	c. Release Granted = "Yes".
	d. Start Date = your Entry Date. End Date = a year out from the Entry Date.
	e. Documentation = "Signed Statement from Client". **Save**.
5 Add Case Manager	a. On your Summary tab, you should see the Case Manager dashlet.
	b. Click **Add**. Select the person who made contact with the client. If that person is not an HMIS user, click Other and fill out the name and phone number at the very least.
	c. VERY IMPORTANT: Select the provider the case manager is outreaching on behalf of. Think of this as the "Responsible Provider".
	d. Make the Start Date the date the case manager first met the client. **Save.**
6 Entry / Exit	a. On your Summary tab, you should see the Entry/Exit dashlet.
	b. Choose the Entry Exit Type of "Standard". Click **Save and Continue.**
	c. Answer the assessment questions to the best of your ability. Enter one Contact on the Head of Household for the initial interview. Make the Start and End Dates the same date. In the comment text field, describe where the client is staying, including intersections, mile markers, etc.
	d. Complete a VI-SPDAT on the Head of Household. If the client is a single, choose VI-SPDAT 2.0. If the client is in a household, choose VI-FSPDAT 2.0. Click **Save and Exit.**
	e. Complete the assessment on each household member, using the left sidebar to flip from one client to the next.
7 Referrals	a. Click "Add Referral". Select any needed services from the Service Code Quicklist and click "Add Terms".
	b. Under "Refine Provider Search Criteria", enter any geographical information pertaining to where the client is.
	c. Review the "Search Results" for any providers that offer the services needed in the geography specified. If there are no results, try searching on County instead of City or enter a neighboring County to find resources for the household or individual. If the provider you are looking for still cannot be found, check the "Referral Provider Quicklist", select the provider, and click "Add Provider".
	d. Under Refer to Providers, record the date, ranking, VI-SPDAT score, Projected Follow-up Date, and User. Click **Save ALL**.
	e. If any providers selected for the Referral do not have access to HMIS, the user will have to update the Referral by clicking its pencil on the Summary tab and saving any relevant data.
8 Interims	a. At each contact, gather data elements previously not collected and enter them. If the client has not consented to HMIS data collection, try to gain consent at each interim but it is ok if they wish to remain unidentified in HMIS.
	b. Pull up the client's record and go to the Entry/Exit tab. Click the icon in the Interims column.
	c. Click "Add Interim Review". Choose "Update" for Interim Review Type. Click **Save.**
	d. Record a new Contact record at each interim.
	e. If a different case manager or provider takes over the client, add an End Date to the Case Manager record and create a new one with the new information. **Save.**
9 Exit Client	a. Once the client is no longer "unsheltered", (whether the Destination is ideal or not), the Case Manager must Exit them as soon as possible.
	b. If a case manager has attempted 3 contacts or it has been 30 days since there has been any contact, the client should be exited with a Destination of "No Exit Interview Completed".
	c. On your Summary tab, find the Entry/Exit dashlet. Click the Exit pencil.
	d. Fill in the Exit data. Click **Save & Continue**. Click **Exit.**