

Process 1

WHEN THE FAMILY ENTERS TOGETHER

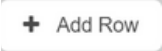
Refer to HMIS Entry Workflow Guide for detailed instructions on how to complete the workflow.

Complete this enrollment process if the entire family enrolls in the shelter together.

HMIS Entry Workflow

1. Click on Client Intake
2. Click on HMIS Entry Workflow
3. Enter Head of Household's (HoH) information
4. Click Save

HMIS Add Family Member Spreadsheet

1. Click  for all the family members that will be added to the enrollment (Ex: if there are 5 family members to be added in addition to the HoH, click add row 5 times)
2. Enter family members first and last name
3. Click  one time
 - a. If client appears click their name
 - b. If client does not appear, click "This is a new client"
4. Complete the fields for all of the family members
5. Click Save

Enrollment Add/Edit

1. Select the Program
2. Assign Case Manager if needed
3. Click Save

HMIS Enrollment Members

1. Click the checkbox for all family members who will be enrolled in the program
2. Click Save

Assessments

1. Complete assessments for all family members enrolling in the program.
Some assessments only appear for members who are 18 years or older.

Process 2

WHEN THE ENTIRE FAMILY LEAVES

Refer to HMIS Entry Workflow Guide for detailed instructions on how to complete the workflow.

Complete this exit process when an entire family leaves the enrollment together.

Access

1. Click on Case Management
2. Click on Enrollments
3. Click on **Enrolled**
4. Click Complete exit assessment

Verifying the Family has been Exited

1. Click on Case Management
2. Click on Enrollments
3. Status should read **Exited** for the project that the family was exited from and an exit date is listed for the Project Entry - Exit Dates on the family enrollment member record

Process 3

WHEN A FAMILY MEMBER JOINS LATER

Refer to HMIS Entry Workflow Guide for detailed instructions on how to complete the workflow.

Complete this enrollment process if a family member enrolls later. Examples for later enrollment: birth of a baby, child released from foster care, spouse released from prison.

Access

1. Open the HoH profile
2. Click on Client Connections
3. Click on Add Family Member and Enrollments
4. Enter family members first and last name
5. Click one time 
6. If client appears click their name
7. If client does not appear, click "This is a new client"
8. Complete the fields for the family member
9. Click Save

Add Family Member to Open Enrollment

1. Select the program from the Enrollment drop down menu
2. Entry date should reflect the date individual will begin receiving services
3. Select Enrollment Relation to HoH
4. Click Save

Assessments

1. Complete all required assessments
2. Click Save

Question

1. Add another enrollment?
 - a. Select "Yes" if you need to enroll an additional family member
 - b. Select "No" if there are no other members to enroll at the time
2. Click Save

Process 4

WHEN A FAMILY MEMBER LEAVES

Refer to HMIS Entry Workflow Guide for detailed instructions on how to complete the workflow.

Complete this exit process if a family member leaves the enrollment.

Access

1. Click on Case Management
2. Click on Enrollments
3. Click on  of project client is exiting
4. Click Member
5. Click on the client's name that is to be exited
6. Click Complete exit assessment

The HoH cannot exit a program. If the HoH needs to be exited, you must assign another member of the family as the HoH before you can complete the exit assessment for the original HoH.

Verifying the Client has been Exited

The client will still appear in the family, since the client is still a member of the family and the enrollment is still open. To verify that you have successfully exited the client from the enrollment, follow these steps.

1. Click on Case Management
2. Click on Enrollments
3. Click on  of project client is exiting
4. Click Member
5. Verify that there is an exit date for the Project Entry - Exit Dates on the client's enrollment member record

CONTACTS

To assist with data collection & entry, access the HMIS Data Standards at the following link:

[HMIS Data Standards - HUD Exchange](#)

If you encounter issues or have questions, submit an email to our ticketing system at

hmis.support@havenforhope.org.

