HMIS Data Entry Checklist

The purpose of this checklist is to ensure agencies follow the appropriate workflow for entering clients into KYHMIS to prevent creating data quality errors/issues.

- Go to **Enter Data As** (top right corner)
- Go to **Back Date** mode (agencies have 3 days to enter client data)
- Click **ClientPoint** (left hand side of screen)
  - Search client by name **and** SSN
  - If client is in the system, select client
  - If not "Add New Client with this information"

Summary:
- When adding new client, the first screen that comes up is the Summary tab. From there you will need to move from left to right to complete the client information. – *This is very important to follow this flow to avoid visibility problems.*

Client Profile:
- Complete both the **Client Record** and **Client Demographics** information
- Complete all information by selecting the pencil – keep in mind that if you select "*Client doesn't know", "Client Refused*", or "*Data not Collected*" will cause errors on reports.
- On this tab you can save any **attachments** that you might want to; such as Driver's License, or intake documents, etc.

Household:
- If the client presents with a household, they will need to be entered onto the **Household** tab. *Note: If those members have not been entered in the system their profile will have to be created.*
- Setup each family member with a **Relationship to Head of Household**.

ROI: Add **Release of Information** (making sure clients sign document found on Help Desk). *Note: A new release will need to be added for EACH project the client enters.*
- ROI's are good for 1 year
- Make sure to include all household members

Entry/Exit: Click the **Add Entry/Exit** button to add entry into the project
- Make sure to select all family members
- Make sure to select the appropriate **Type** (HUD, RHY, PATH, and VA are the most likely choices for BOS)
- Complete the **Entry Assessment** for all family members

Service Transactions: Add any services that the client may have while working with your agency

Annual Assessments: If the client is active in the project for a year, complete an Annual Assessment as close to the anniversary of the **Project Start Date**.
- Updating any and all information that changed from Project Start.

Exit Date:
- Stay clear of using "*Client Doesn't Know*", "*Client Reused*", "*Data not Collected*" on Exit Destination or this will cause an error on reports.
- When exiting the client/household make sure to update any and all information (Income, Non-cash, Disability, Insurance, etc.) that changed from entry/interim as this will affect System Performance Measures.

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