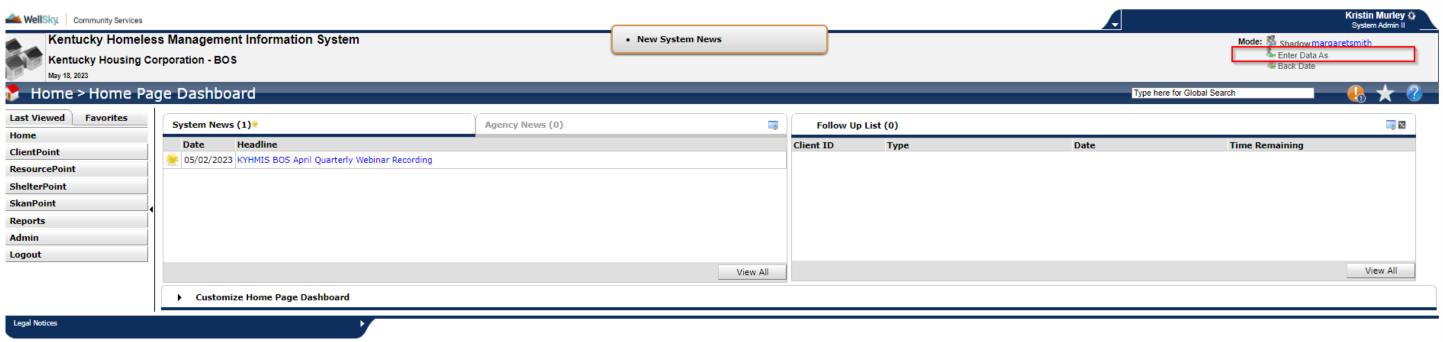
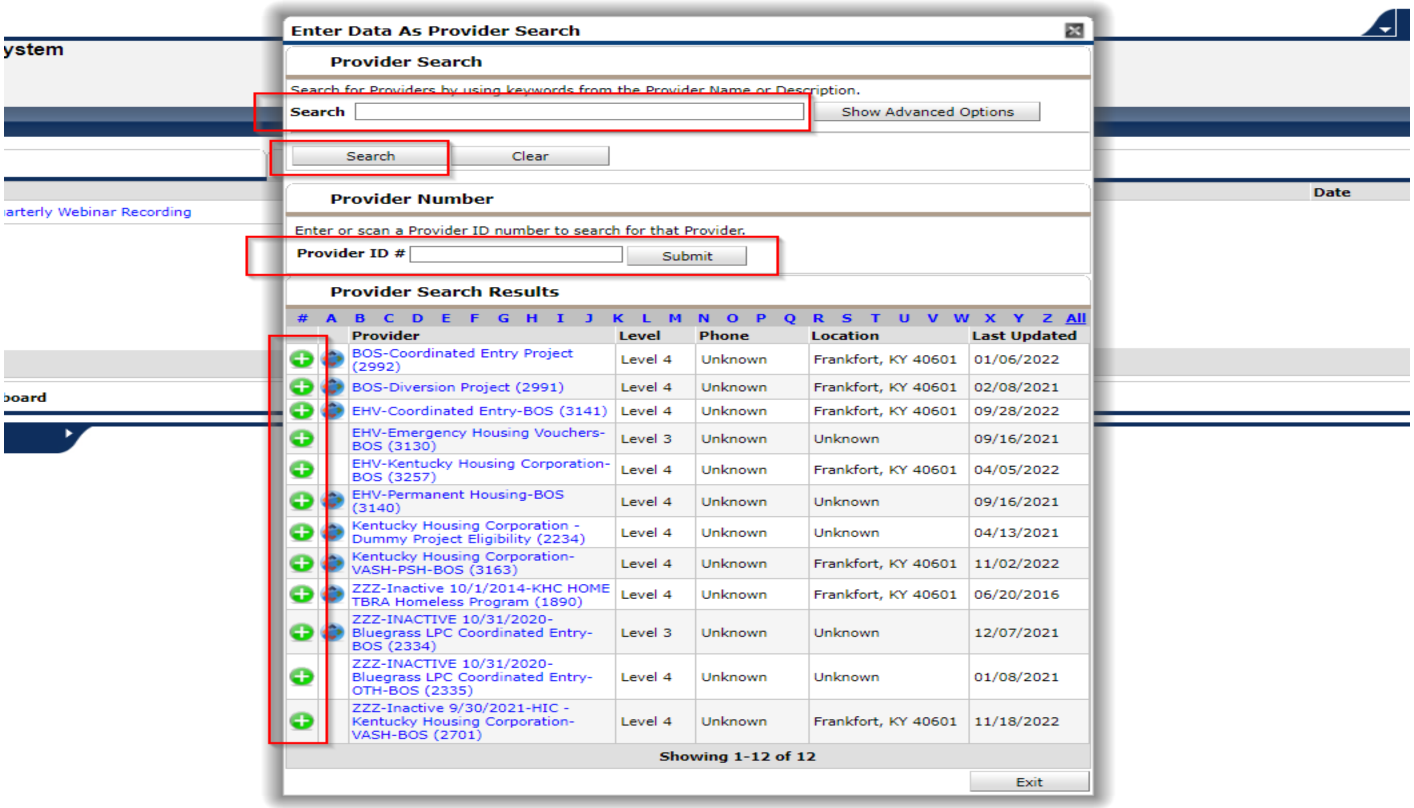
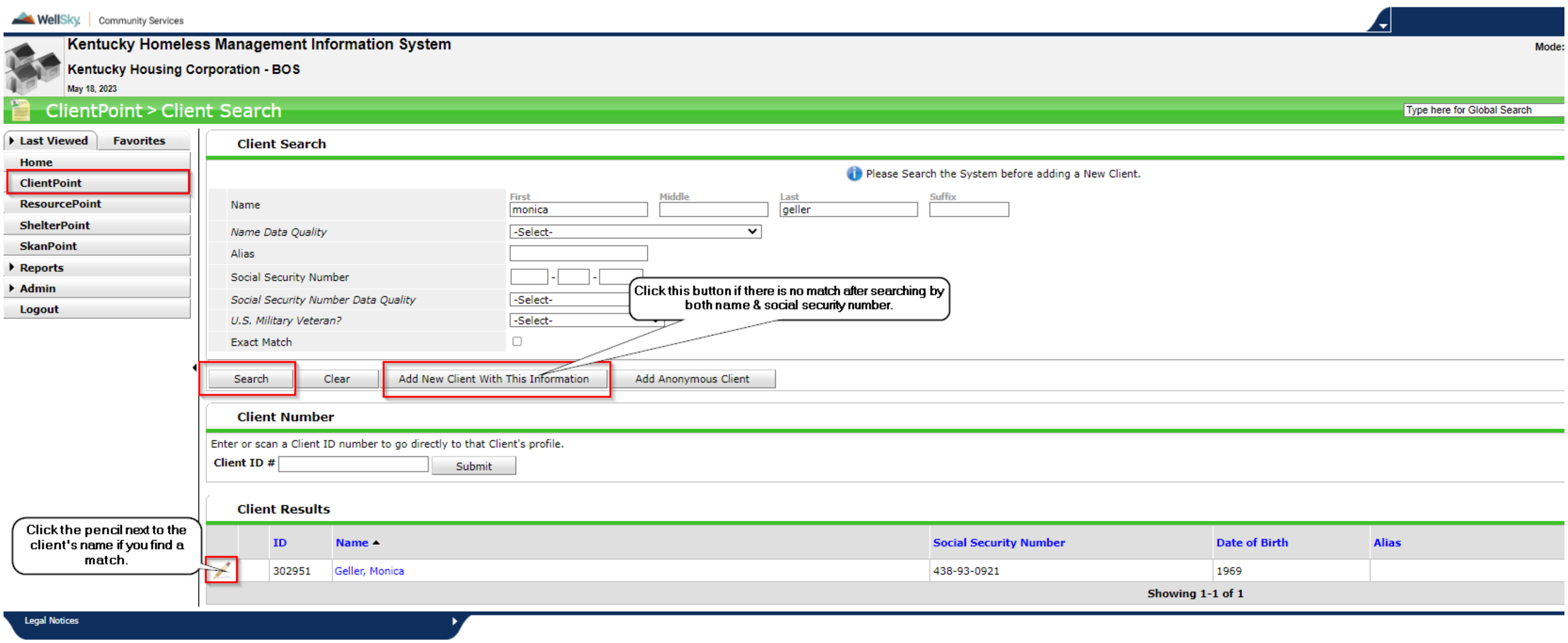
	Enter Data As
	After logging into KYHMIS, go to the upper right-hand corner at the top and click on “Enter Data As”. This is how you choose which project to enter data into/as.
	Click on the green Plus (+) sign next to the applicable project for which you will be entering the client/household.
	You can also search for the provider by typing in the “Search” bar & then clicking “Search”, or by typing in their provider ID number in the “Provider ID#” bar & then clicking “Submit”
	NOTE: ONLY put clients in Level 4 projects.




Enter Data As Provider Search
Provider Search
Search for Providers by using keywords from the Provider Name or Description.
Search
Show Advanced Options
Search
Clear
Provider Number
Enter or scan a Provider ID number to search for that Provider.
Provider ID #
Submit
Provider Search Results
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All
Provider Level Phone Location Last Updated
BOS-Coordinated Entry Project (2992) Level 4 Unknown Frankfort, KY 40601 01/06/2022
BOS-Diversion Project (2991) Level 4 Unknown Frankfort, KY 40601 02/08/2021
EHV-Coordinated Entry-BOS (3141) Level 4 Unknown Frankfort, KY 40601 09/28/2022
EHV-Emergency Housing Vouchers-BOS (3130) Level 3 Unknown Unknown 09/16/2021
EHV-Kentucky Housing Corporation-BOS (3257) Level 4 Unknown Frankfort, KY 40601 04/05/2022
EHV-Permanent Housing-BOS (3140) Level 4 Unknown Unknown 09/16/2021
Kentucky Housing Corporation - Dummy Project Eligibility (2234) Level 4 Unknown Unknown 04/13/2021
Kentucky Housing Corporation-VASH-PSH-BOS (3163) Level 4 Unknown Frankfort, KY 40601 11/02/2022
ZZZ-Inactive 10/1/2014-KHC HOME TBRA Homeless Program (1890) Level 4 Unknown Frankfort, KY 40601 06/20/2016
ZZZ-INACTIVE 10/31/2020-Bluegrass LPC Coordinated Entry-BOS (2334) Level 3 Unknown Unknown 12/07/2021
ZZZ-INACTIVE 10/31/2020-Bluegrass LPC Coordinated Entry-OTH-BOS (2335) Level 4 Unknown Unknown 01/08/2021
ZZZ-Inactive 9/30/2021-HIC - Kentucky Housing Corporation-VASH-BOS (2701) Level 4 Unknown Frankfort, KY 40601 11/18/2022
Showing 1-12 of 12
Exit

If you are adding a new family (i.e., household), add the head of household first.

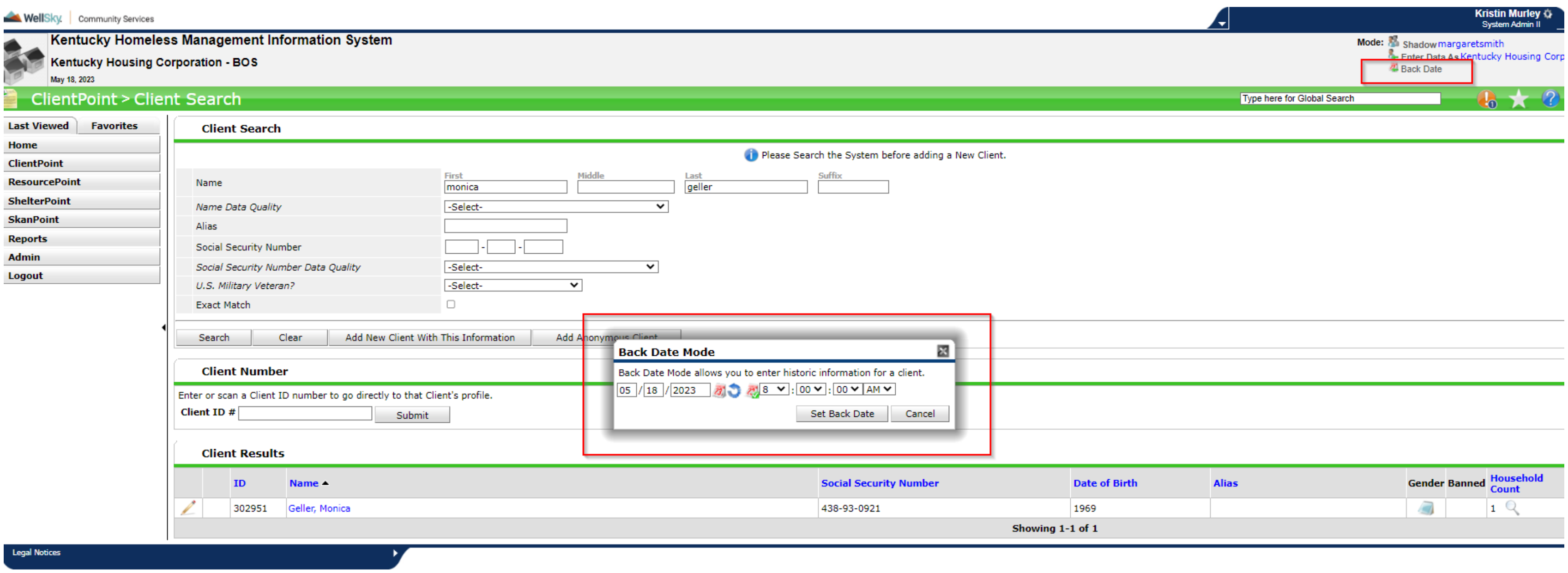
	Client Search
	On the left-hand side of the screen, click "ClientPoint" to begin searching for your client's name. **You must search for an existing client prior to adding a new client.**
	If there is a match, click on the pencil to the left of the client's name.
	If there is no match to the client's name, add the Social Security Number and search again.
	If there is still no match, choose "Full SSN Reported (*HUD*)" from the drop-down list to the right of Social Security Number Data Quality.
	NOTE: You MUST add the SSN during the client search, prior to adding a new client. If you do not complete this step, you will not be able to enter the SSN later.
	Click "Add New Client with This information"
	The system will ask you again if you would like to add a New Client to the system, click "OK".


WellSky Community Services
Kentucky Homeless Management Information System
Kentucky Housing Corporation - BOS
May 18, 2023
Mode:
ClientPoint > Client Search
Type here for Global Search
Last Viewed
Favorites
Home
ClientPoint
ResourcePoint
ShelterPoint
SkanPoint
Reports
Admin
Logout
Client Search
Please Search the System before adding a New Client.
Name
First
monica
Middle
Last
geller
Suffix
Name Data Quality
-Select-
Alias
Social Security Number
Social Security Number Data Quality
-Select-
U.S. Military Veteran?
-Select-
Exact Match
Click this button if there is no match after searching by both name & social security number.
Search
Clear
Add New Client With This Information
Add Anonymous Client
Client Number
Enter or scan a Client ID number to go directly to that Client's profile.
Client ID #
Submit
Client Results
Click the pencil next to the client's name if you find a match.
ID
Name
Social Security Number
Date of Birth
Alias
302951
Geller, Monica
438-93-0921
1969
Showing 1-1 of 1
Legal Notices

Back Date Mode	
	The system will prompt you to select the date in which the (1) person entered the Project, (2) the information changed/updated information, or (3) the person exited the Project. Select the date and time in which the entry/exit/update occurred.
	NOTE: If you are doing data entry in live time, you will not have to set a back date. Just click on "Use Current System Date". The policy within the BOS is that you enter data within 3 days of collecting.
	Go to the upper right-hand corner at the top of the screen and click "Back Date" – You will notice your headers will turn yellow after you have successfully selected the date. This lets you know that you are in Back Date Mode.

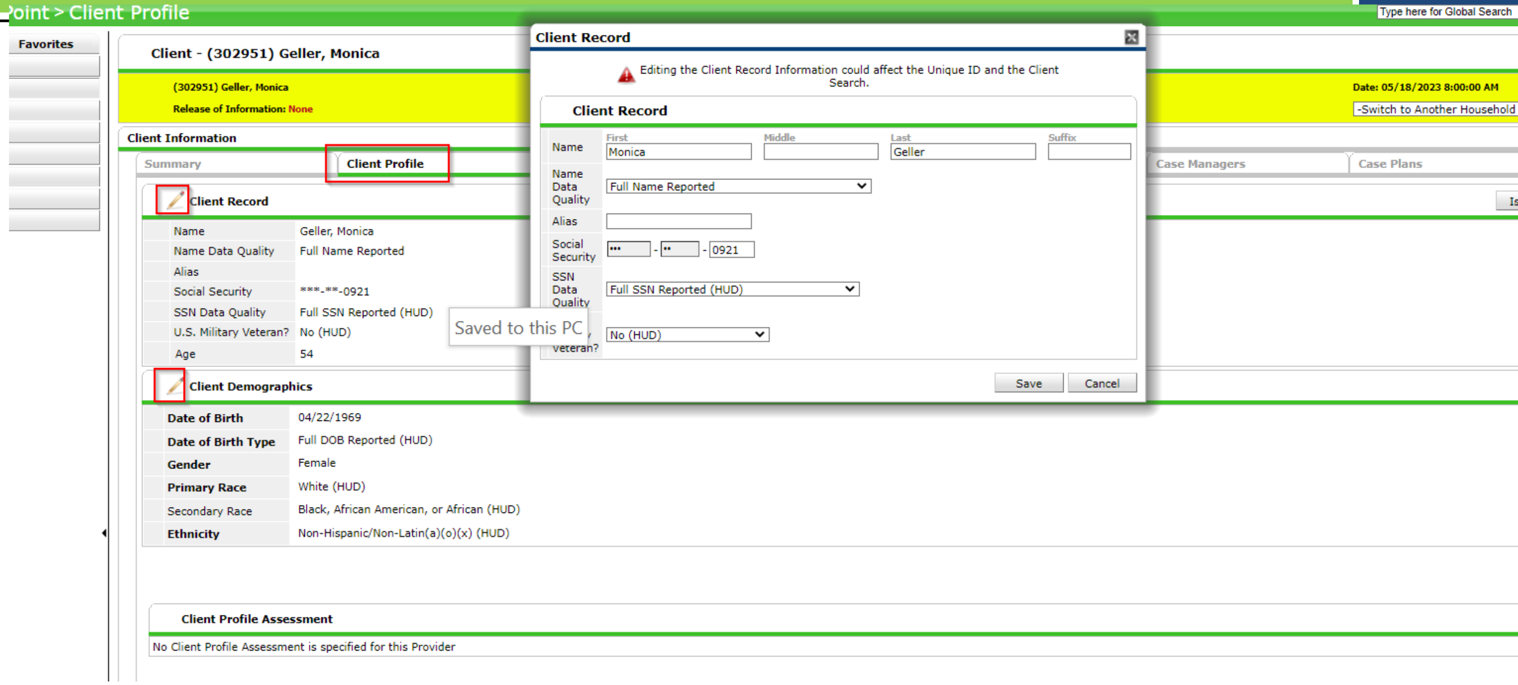
NOTE: Only when you are in Enter Data As (EDA) mode and are in the correct date and time are you ready to enter client data.

NOTE: Tabs in KYHMIS are laid out in a certain order to help users remember the correct workflow. The goal is to move from left to right along the tabs.



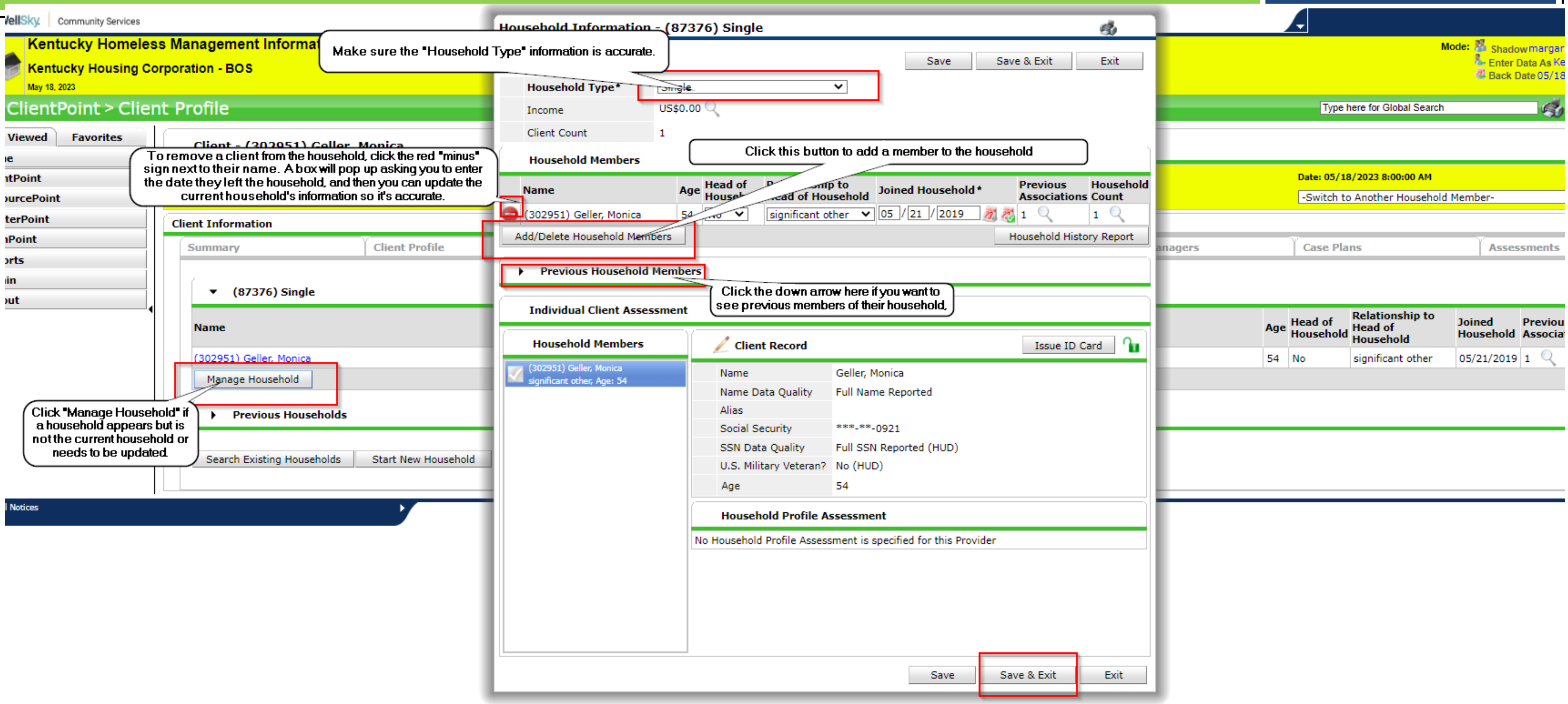
	Client Profile
	Click on the “Client Profile” tab.
	Client on the pencil next to the subheading “Client Record”.
	Complete the Veteran Information & any other missing Client Record information for the client.
	Click “Save”.
	Click on the pencil next to the subheading “Client Demographics”.
	Complete all information.
	Click “Save”.

NOTE: Scroll down the screen to locate the subheading “Client Notes”, “File Attachments”, and “Incidents”. If at any time you need to add a statement of homelessness, client case notes, or incidents that occur at our agency such as a ban rule, please add here.



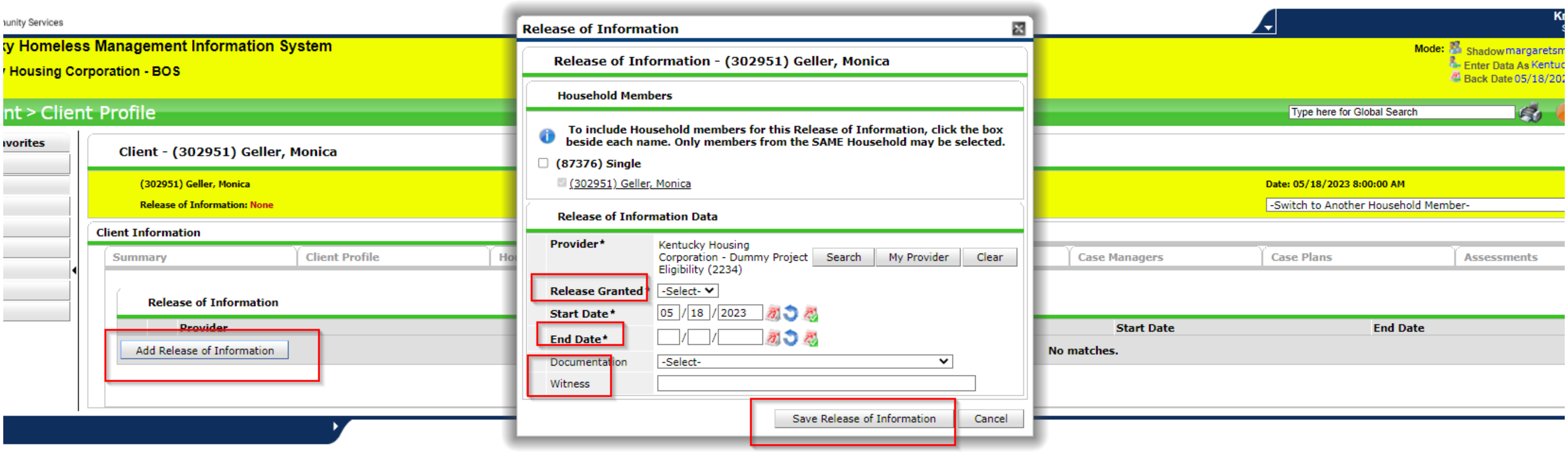
Households (skip if client is single) ***This tab allows you to see current household members, those that have been added, other household associations, previous associations, and household profile information.***	
	NOTE: If an old household appears, but is not your client's current household situation, please DO NOT add a new household. We will manage an existing household as we move though the data entry process.
	NOTE: You MUST search for all clients in the household before you add a new client. Once you have searched all other household members and your household is built- then you are able to move on.
	NOTE: Once a household is created, that household can NEVER be delete or removed from KYHMIS. Please be very careful when creating new households and double checking when searching for each household member. New households should only be created when no existing households can be located.
	To search for an existing household: Click "Search Existing Households"**.**
	To create a new household: Click "Add New Household". Select the "Household Type" from the drop-down menu. Search for household members as detailed on Page 1 of this Workflow Guide. Only add new household members after searching by both name & SSN. Select the date the client(s) joined the

	household and set the "Relationship to Head of Household" & "Head of Household" fields for each client.
	To edit/update an existing household: Click "Manage Household". • ***To remove a household member:*** Click the red Minus (-) sign next to the appropriate client's name that is being removed. Enter date the client left the household/effective date in the prompt that pops up. • ***To add a household member:*** Click the "Add/Delete Household Member" button. Click the drop-down arrow next to "Add Clients to the Household" to search for household member. Select the date the client joined the household and set the "Relationship to Head of Household" & "Head of Household" fields for each client. • ***To re-join a previous member back to the household:*** Click the drop-down arrow next to "Previous Household Members" to see list of previously associated clients. To re-join the household member(s), click the "rewind" button next to the client's name. Enter date the client rejoined the household/effective date in the prompt that pops up.


Make sure the "Household Type" information is accurate.
To remove a client from the household, click the red "minus" sign next to their name. A box will pop up asking you to enter the date they left the household, and then you can update the current household's information so it's accurate.
Click this button to add a member to the household
Click the down arrow here if you want to see previous members of their household.
Click "Manage Household" if a household appears but is not the current household or needs to be updated.
Household Information - (87376) Single
Household Type
Income
Client Count
Household Members
Add/Delete Household Members
Household History Report
Previous Household Members
Individual Client Assessment
Client Record
Household Profile Assessment
No Household Profile Assessment is specified for this Provider
Save
Save & Exit
Exit
ClientPoint > Client Profile
Manage Household
Previous Households
Search Existing Households
Start New Household

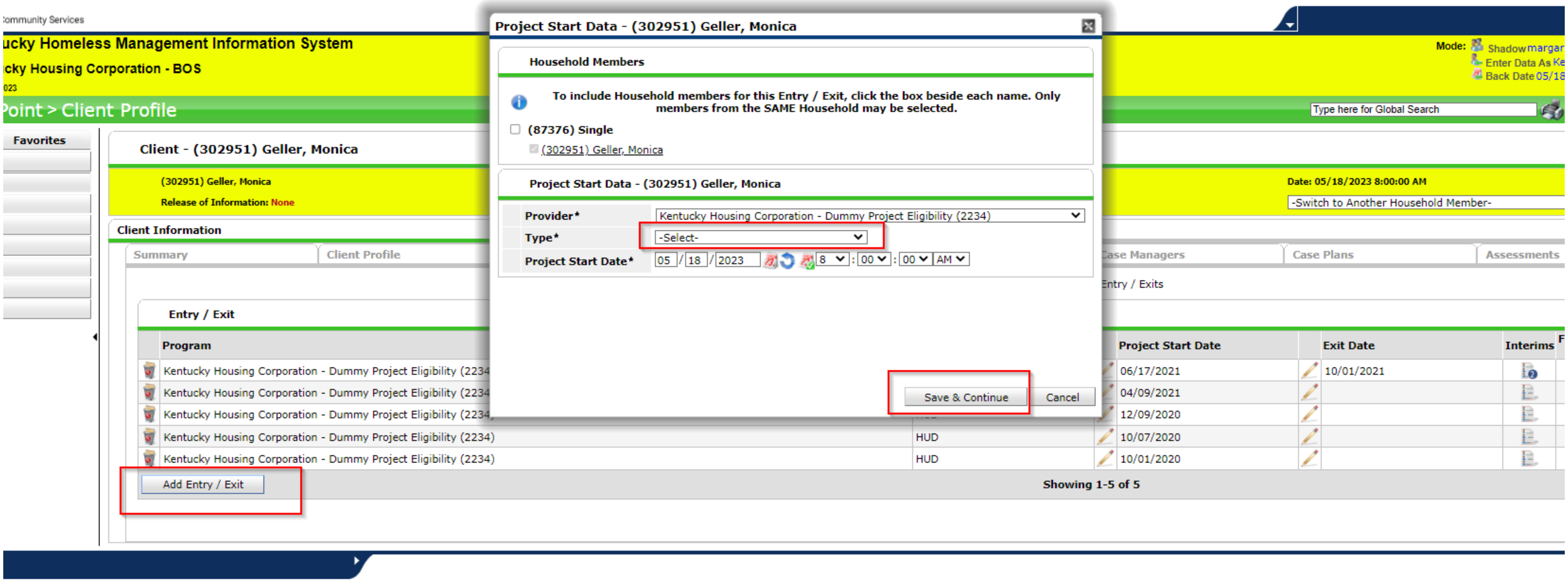
NOTE: Release of Information is better known as an ROI. This release allows information to be shared from Project to Project within an agency or across agencies. You can upload a physical copy of the release of information for clients in KYHMIS, but agencies must have one on file. Also, the Head of Household or other adults in the household can sign releases for under 18-year-old dependents, however EVERY adult must have their own individual release. Each adult can decide on the type of release they would like, and information can be shared at different levels. Please contact your System Administrator via submitting a ticket through the Partner Agency Portal for further questions. Clients that do not wish to share information outside of the assisting agency must have their records "locked". This is done by submitting a ticket through the KHC Partner Agency Portal as well.

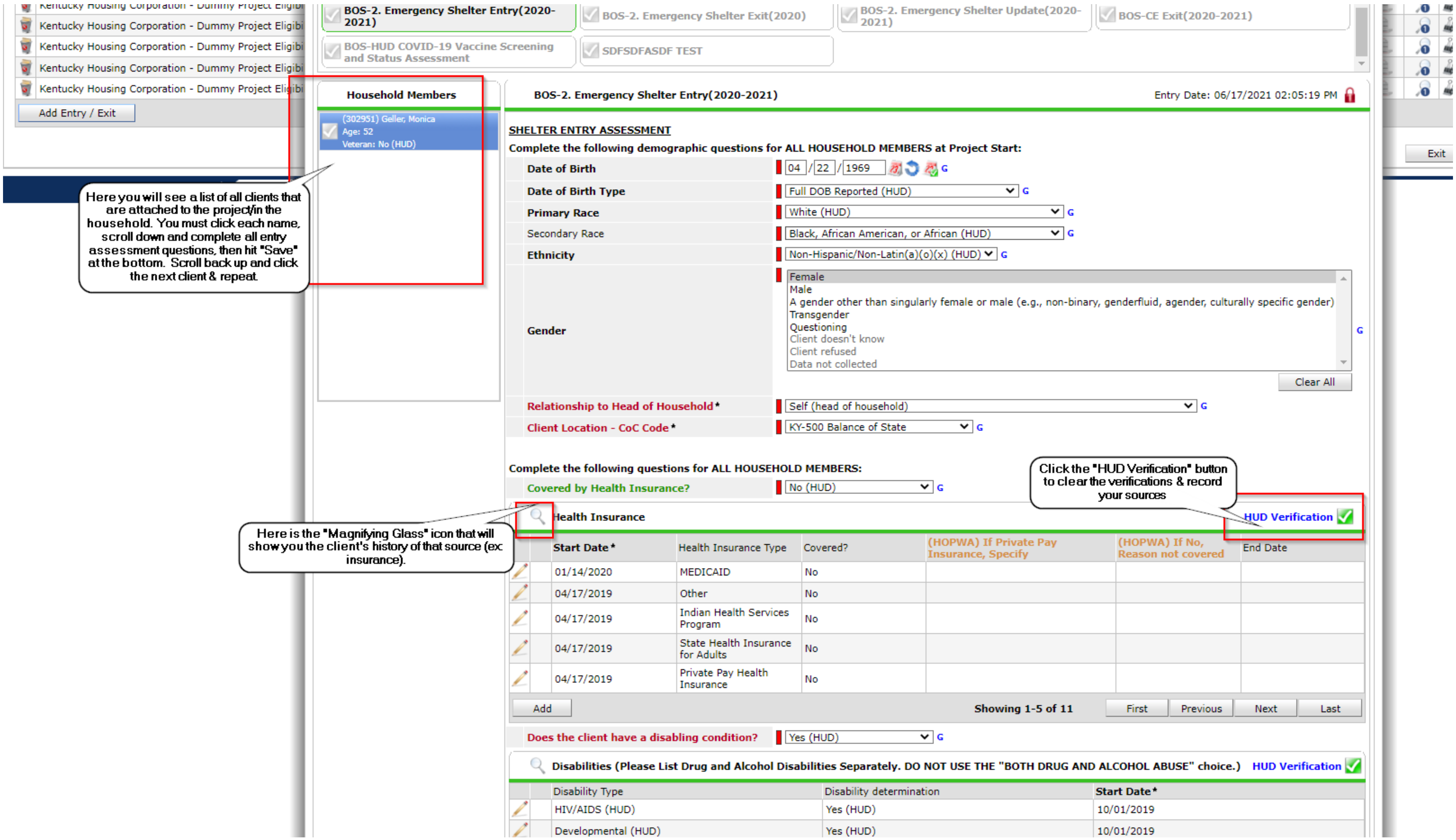
	ROI (Release of Information)
	Click on the "ROI" tab.
	Click on "Add Release of Information".
	NOTE: The system will show all the households this client is associated with, that is why we DO NOT create new households with clients already in exiting households.
	Locate the correct household and checkmark the box(es) to indicate which household members are covered by this particular release.
	NOTE: A release can cover the entire family if there is only one (1) adult and several children. Or it may cover one adult and all children, leaving the other adults in the household to have their own release. Make sure to select the appropriate choice.
	Find the "Search" button located next to "Provider". This button can be used to add an ROI to multiple Projects within an agency or group of agencies. For example, if a person is receiving services or being referred to other Projects within your agency, you can save time and assign the ROI for all the Projects at one time.
	Click "Search".
	Click the green Plus (+) buttons for all providers you would like to include under the ROI.
	Click "Exit" once you have selected all providers. The providers included in the release are now shown under provider.
	"Release Granted" field MUST always be marked "Yes". Then select ROI "Start Date" & "End Date". ROI end date must be 1 year + 1 day from ROI start date. Finally, under "Documentation" drop-down, select either "Signed Statement- Release & Share All" or "Verbal Statement- Release & Share All", then hit "Save Release of Information".
	If client chooses to have their data locked down outside of the assisting agency, repeat all the step above, except for "Documentation" drop-down. Here you will select "Signed Statement- Do Not Release or Share" then hit "Save Release of Information". Submit a ticket through the KHC Partner Agency Portal letting the System Admins know client has chosen ROI option #2 and their record needs to be locked.
	After clicking "Save Release of Information" the system will take you back to the main ROI screen and you will see all the Projects a ROI has been granted for.


Release of Information
Release of Information - (302951) Geller, Monica
Household Members
To include Household members for this Release of Information, click the box beside each name. Only members from the SAME Household may be selected.
(87376) Single
(302951) Geller, Monica
Release of Information Data
Provider*
Kentucky Housing Corporation - Dummy Project Eligibility (2234)
Search
My Provider
Clear
Release Granted*
-Select-
Start Date*
05 / 18 / 2023
End Date*
Documentation
Witness
Save Release of Information
Cancel
Client - (302951) Geller, Monica
Release of Information: None
Client Information
Summary
Client Profile
Case Managers
Case Plans
Assessments
Release of Information
Provider
Add Release of Information
Start Date
End Date
No matches.
Client Profile
Date: 05/18/2023 8:00:00 AM
-Switch to Another Household Member-
Type here for Global Search

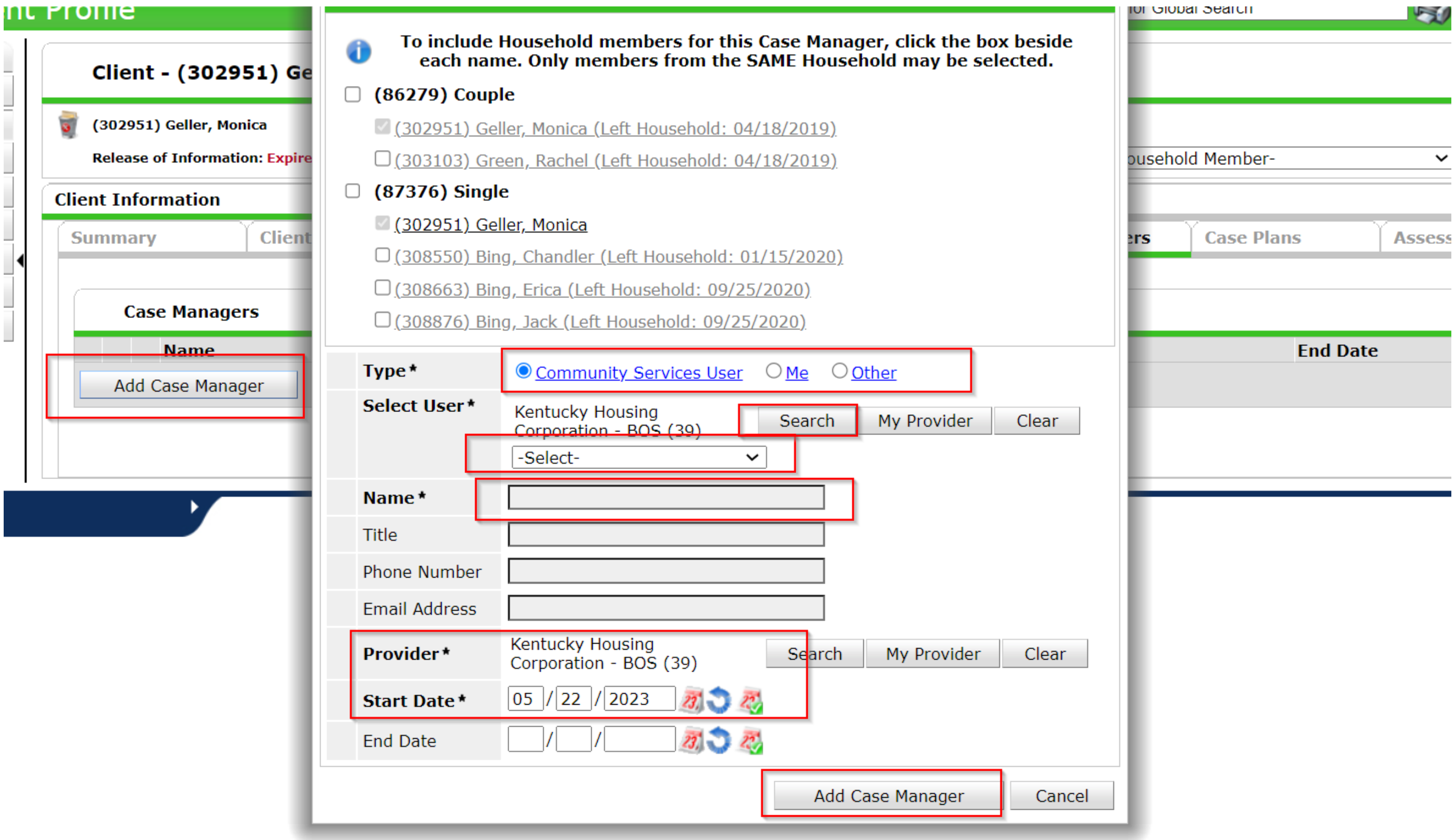
NOTE: It is important to always have a correct start and end date for the client's/household's participation in the project. This is tab is also used to update information using interim assessments.

	Project Entry
	Click the "Entry / Exit" tab.
	Click "Add Entry / Exit" to add Head of Household to the project.
	NOTE: You always want to start/navigate from the Head of Household's profile when entering data and making updates/changes.
	Click "Include Additional Household Members".
	NOTE: All households associated with that client will appear. Make sure to check the boxes of the correct household members to include them in the Project entry. If you are including all members, simply check the box next to the household I.D. If the client is single, skip this step.
	Select the entry type "HUD" – MUST ALWAYS BE HUD, unless you are entering data for PATH, RHY, or VA. In those instances, you will choose the appropriate entry type. All others will be "HUD".
	NOTE: Make sure the provider is correct, the type of entry is always HUD (unless a PATH, RHY, or VA project), and the time and date are reflective of the date the client/household entered the Project. If you are correctly following the workflow, all this information will not have to be corrected here. If this information is not correct, the workflow is incorrect. Please click "cancel" and check the EDA and Back Date mode.
	Click "Save and Continue".
	Complete Entry Assessment data entry for each member of the household. Make sure that you are completing the "HUD Verifications" for each question (*i.e. income, disability, non-cash benefits, etc.*). The HUD Verifications will show as a red exclamation mark (!) until it has been cleared correctly. When done correctly, the HUD Verification will turn to a green check mark. To clear HUD Verification, click "HUD Verification" and select/toggle to either "Yes" or "No" for each source (*ex: Medicaid insurance, Mental Health disability, etc.*). Click "Save & Exit". After scrolling down & completing all Entry Assessment questions for each member, click "Save" at the bottom of the screen. Click on the next member from left-hand menu (*current member will be highlighted blue*) and repeat steps above, then click "Save".
	NOTE: After each member is complete, their check mark will appear green in left-hand menu.
	Click "Save and Exit" when complete.

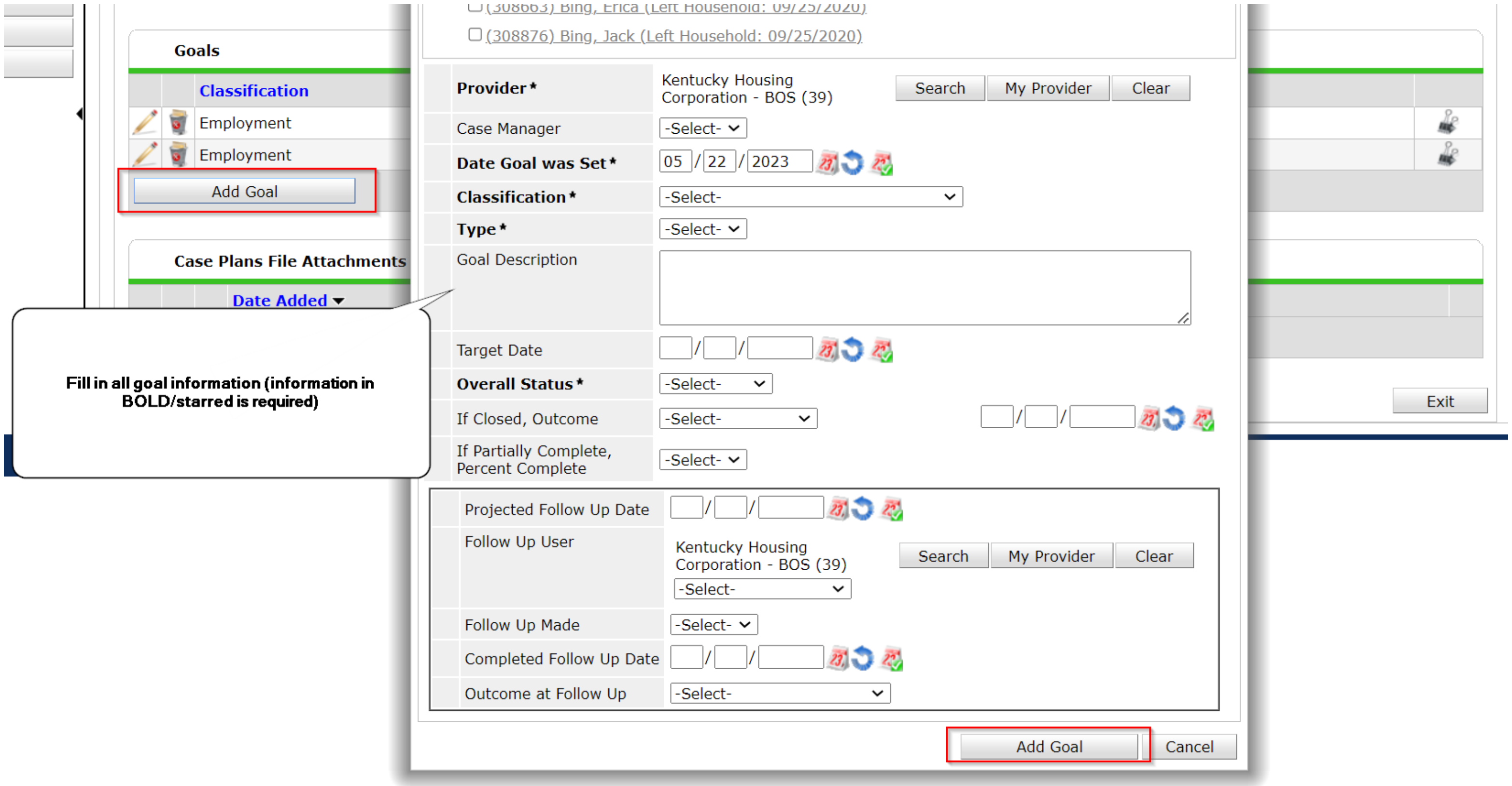

Project Start Data - (302951) Geller, Monica
Household Members
To include Household members for this Entry / Exit, click the box beside each name. Only members from the SAME Household may be selected.
(87376) Single
(302951) Geller, Monica
Project Start Data - (302951) Geller, Monica
Provider*
Kentucky Housing Corporation - Dummy Project Eligibility (2234)
Type*
-Select-
Project Start Date*
Save & Continue
Cancel
Client - (302951) Geller, Monica
Entry / Exit
Program
Project Start Date
Exit Date
Interims
Add Entry / Exit
Showing 1-5 of 5

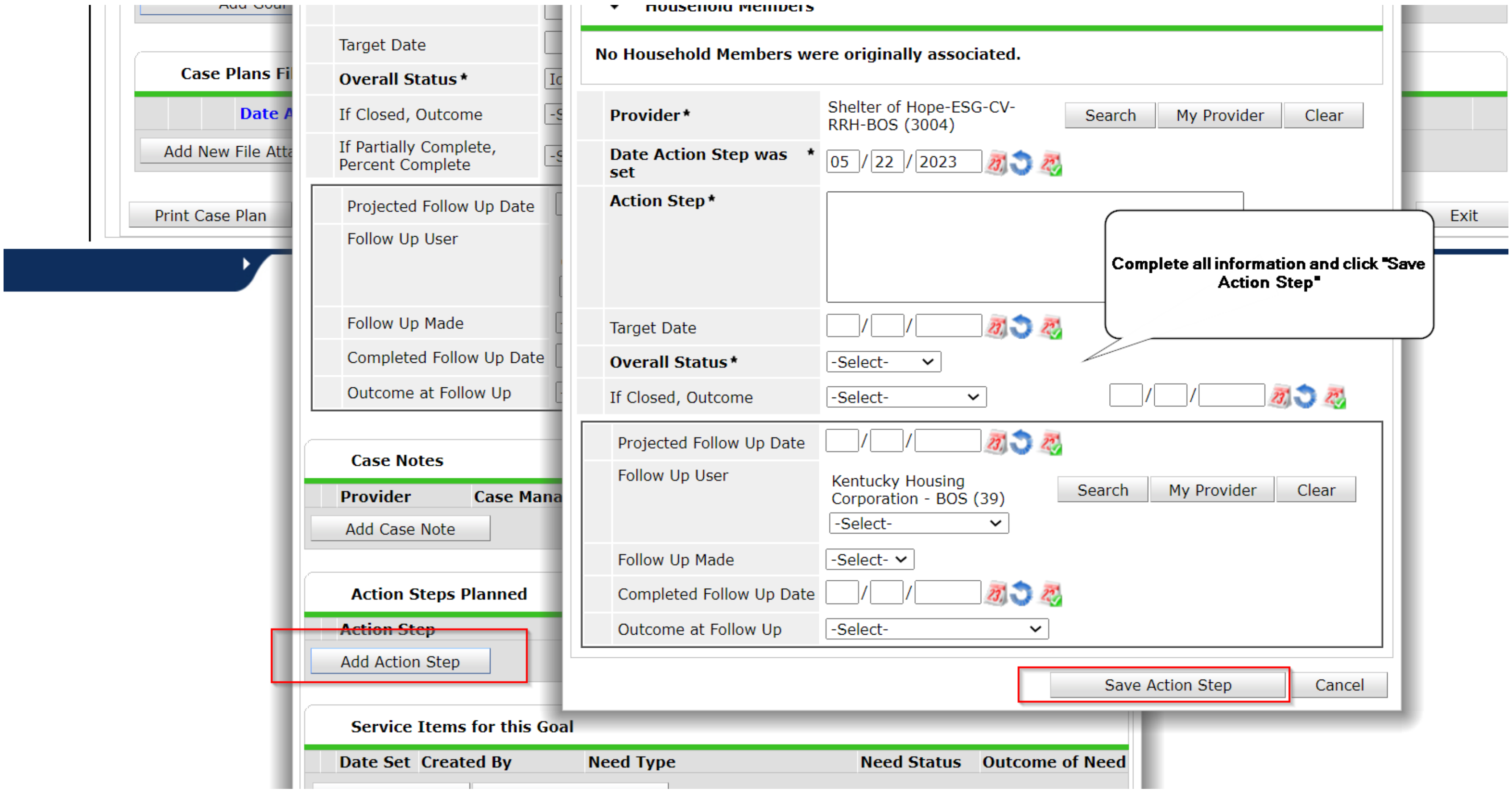

Here you will see a list of all clients that are attached to the project/in the household. You must click each name, scroll down and complete all entry assessment questions, then hit "Save" at the bottom. Scroll back up and click the next client & repeat.
Click the "HUD Verification" button to clear the verifications & record your sources
Here is the "Magnifying Glass" icon that will show you the client's history of that source (ex insurance).
Add Entry / Exit
Household Members
BOS-2. Emergency Shelter Entry(2020-2021)
BOS-2. Emergency Shelter Exit(2020)
BOS-CE Exit(2020-2021)
BOS-HUD COVID-19 Vaccine Screening and Status Assessment
SDFSDFASDF TEST
Entry Date: 06/17/2021 02:05:19 PM
SHELTER ENTRY ASSESSMENT
Complete the following demographic questions for ALL HOUSEHOLD MEMBERS at Project Start:
Date of Birth
Date of Birth Type
Primary Race
Secondary Race
Ethnicity
Gender
Relationship to Head of Household
Client Location - CoC Code
Complete the following questions for ALL HOUSEHOLD MEMBERS:
Covered by Health Insurance?
Health Insurance
HUD Verification
Does the client have a disabling condition?
Disabilities (Please List Drug and Alcohol Disabilities Separately. DO NOT USE THE "BOTH DRUG AND ALCOHOL ABUSE" choice.)
Exit

Case Managers	
	Click on “Case Managers” tab.
	Click “Add Case Manager”.
	Check the boxes of the client/household that will have this case worker. Households can have more than one case worker. If it is the entire household, simply check the box next to the household I.D.
	Select the type of case worker. It may be another KYHMIS User, it may be yourself, and it may be other staff member. Enter the start date of the case manager working with the client.
	NOTE: If this is yourself and information does not appear or it is another KYHMIS user and their contact information does not appear, please contact your System Administrator by submitting a ticket through the KHC Partner Agency Portal.
	Click “Add Case Manager”.


Client - (302951) Ge
(302951) Geller, Monica
Release of Information: Expire
Client Information
Summary
Client
Case Managers
Name
Add Case Manager
To include Household members for this Case Manager, click the box beside each name. Only members from the SAME Household may be selected.
(86279) Couple
(302951) Geller, Monica (Left Household: 04/18/2019)
(303103) Green, Rachel (Left Household: 04/18/2019)
(87376) Single
(302951) Geller, Monica
(308550) Bing, Chandler (Left Household: 01/15/2020)
(308663) Bing, Erica (Left Household: 09/25/2020)
(308876) Bing, Jack (Left Household: 09/25/2020)
Type*
Community Services User
Me
Other
Select User*
Kentucky Housing Corporation - BOS (39)
Search
My Provider
Clear
-Select-
Name*
Title
Phone Number
Email Address
Provider*
Kentucky Housing Corporation - BOS (39)
Search
My Provider
Clear
Start Date*
05 / 22 / 2023
End Date
Add Case Manager
Cancel
ousehold Member-
Case Plans
Assess
End Date

	Case Plans
	Click on "Case Plans" tab.
	Click on "Add Goal".
	Check the boxes of the client/household members that will share this goal. If it is the entire household, simply check the box next to the household I.D.
	NOTE: It is reasonable to consider that different members of the household will have different goals. Most likely children will not have their own individual goals, but the head of household will take on the household's goals. There may be specific goals for each adult in the household.
	Complete goal information.
	Click "Add Goal" when complete.
	NOTE: The screen will prompt you to add action steps that are planned, and service items attached to this goal.
	Click "Add Action Step" and complete information.
	Click "Save Action Step".
	Click "Add Service" – DO NOT use "Add Multiple Services" for a goal. See next section for instructions.
	NOTE: The system will prompt "This will close the Goal popup and take you to the Service Transactions page." Click "OK". We do want services or referrals for each goal.

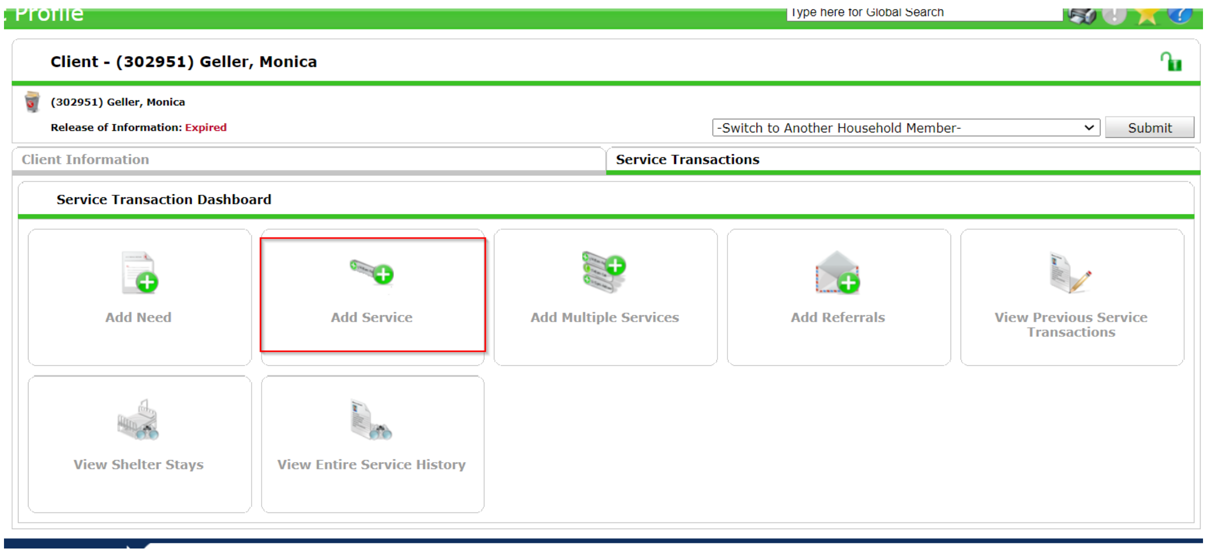

Goals
Classification
Employment
Employment
Add Goal
Case Plans File Attachments
Date Added
Fill in all goal information (information in BOLD/starred is required)
(308876) Bing, Jack (Left Household: 09/25/2020)
Provider *
Kentucky Housing Corporation - BOS (39)
Search
My Provider
Clear
Case Manager
Date Goal was Set *
05 / 22 / 2023
Classification *
Type *
Goal Description
Target Date
Overall Status *
If Closed, Outcome
If Partially Complete, Percent Complete
Projected Follow Up Date
Follow Up User
Kentucky Housing Corporation - BOS (39)
Follow Up Made
Completed Follow Up Date
Outcome at Follow Up
-Select-
Add Goal
Cancel
Exit

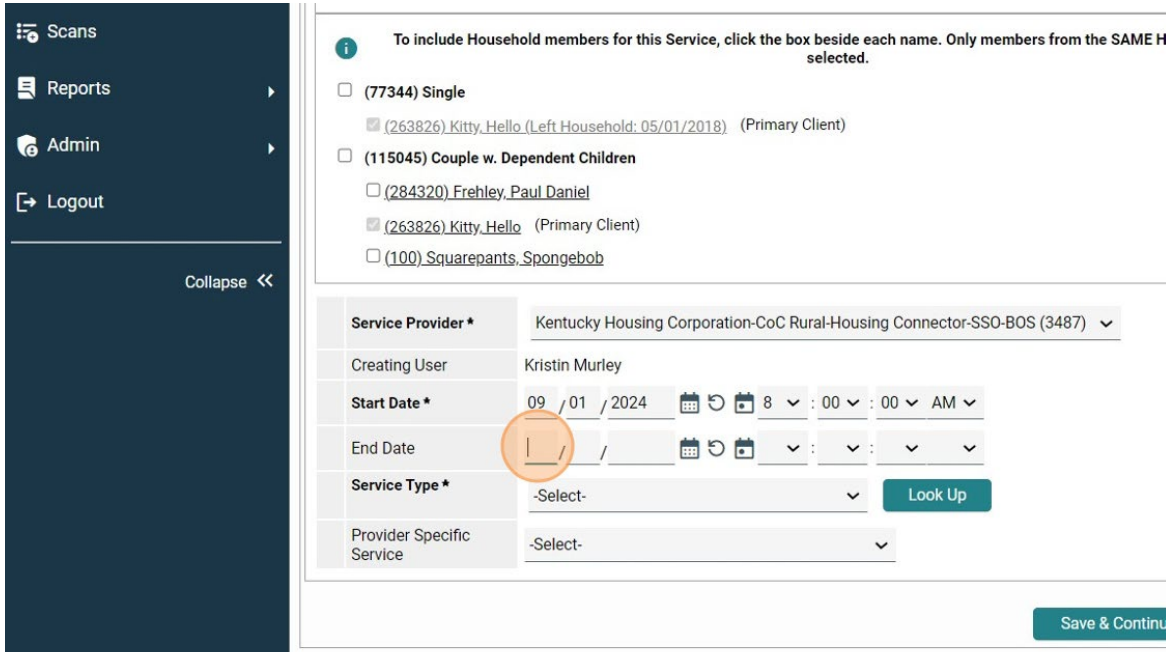


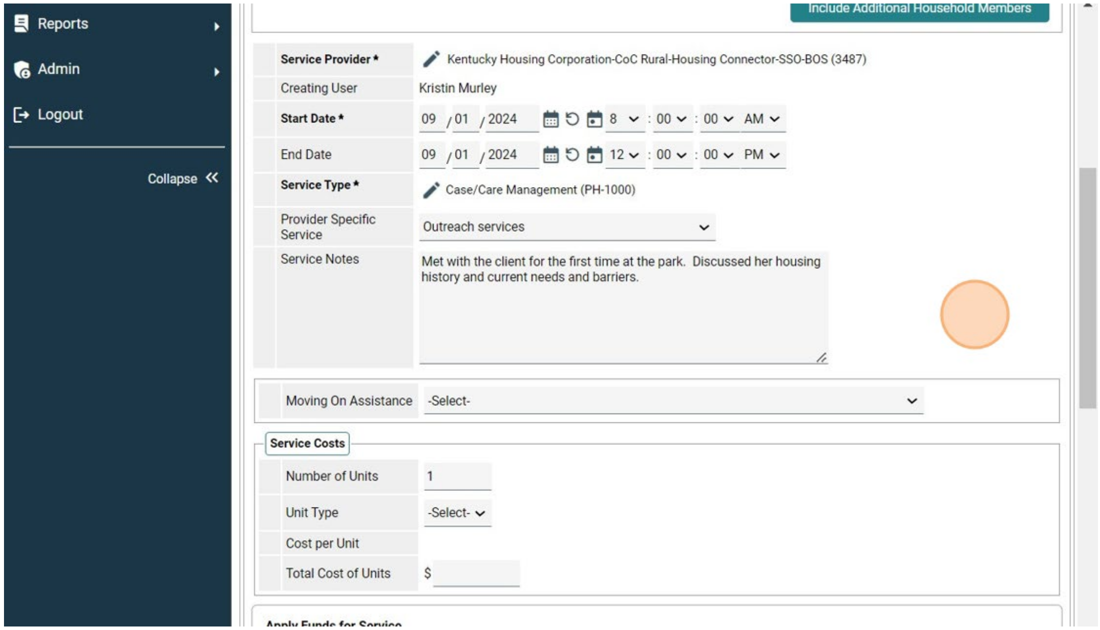
Household Members
No Household Members were originally associated.
Provider*
Shelter of Hope-ESG-CV-RRH-BOS (3004)
Search
My Provider
Clear
Date Action Step was set
05 / 22 / 2023
Action Step*
Target Date
Overall Status*
-Select-
If Closed, Outcome
If Partially Complete, Percent Complete
Projected Follow Up Date
Follow Up User
Kentucky Housing Corporation - BOS (39)
Follow Up Made
Completed Follow Up Date
Outcome at Follow Up
Complete all information and click "Save Action Step"
Save Action Step
Cancel
Case Plans Fi
Add New File Atta
Print Case Plan
Case Notes
Provider
Case Mana
Add Case Note
Action Steps Planned
Action Step
Add Action Step
Service Items for this Goal
Date Set
Created By
Need Type
Need Status
Outcome of Need
Exit

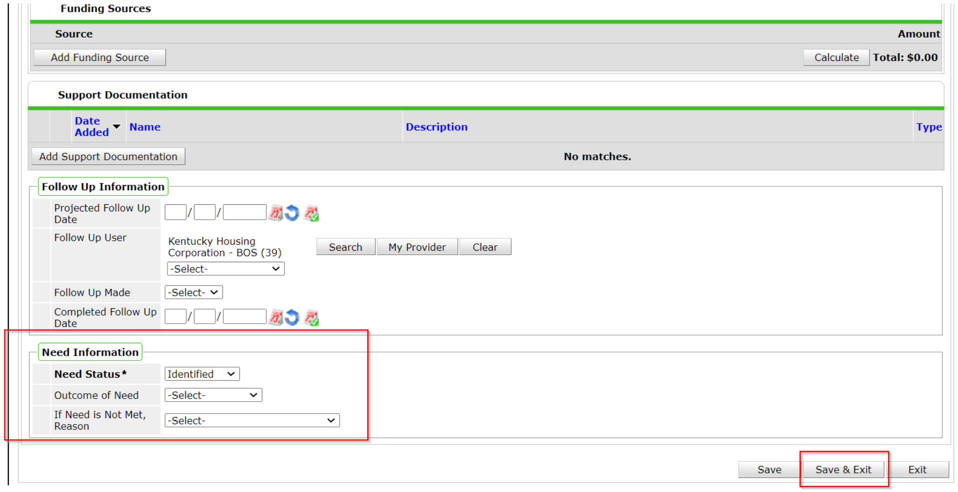
NOTE: Services are often added throughout the Project stay. If the Project would like to add services that are not associated with a goal, simply search client, open record, click on "Service Transactions" tab and follow the steps below.

Service Transactions	
	Click on the "Service Transactions" tab. (*Or you will be brought to this tab automatically if coming from entering goals on the Case Plan tab.)*
	Click "Add Service" button.
	Check the boxes of the client/household that will be included as a benefit from this service. If this is based on a goal it should include the same members that the goal was for. **Any time there is rent, mortgage, or utility financial assistance paid, it does apply to the entire family.** If it is the entire household, simply check the box next to the household I.D.
	NOTE: Make sure to check the household members at the top of the page to see if everyone is added or if someone is added to this service that should not be.
	Check the end date for the service. All services MUST have end dates, and they must be after the start date.
	Click "Service Type" from the drop-down menu. "Service Type" is the general category that the service you are providing falls under. The "Service Type" list will be pre-populated for you, based on funding & project type.
	NOTE: DO NOT use the "Look Up" function. Use the pre-populated list.
	Select "Provider Specific Service". This is the specific service or activity that you are providing for the client(s). The "Provider Specific Service" list will be pre-populated for you, based on funding & project type.
	Click "Save and Continue".
	Complete the type of service, assistance type and assistance amount, if applicable.
	Enter the total cost for service/units and the unit type, if applicable.
	NOTE: Support Documentation and Follow-Up Information is for agency use and not necessarily be related to services. Projects can skip if they choose.
	Complete the "Need Information" specifically in reference to this service. If this was a goal, the need will automatically fill in. If you have fulfilled that need, you will need to close the need.
	Click "Save and Exit".


Profile
Type here for Global Search
Client - (302951) Geller, Monica
(302951) Geller, Monica
Release of Information: Expired
-Switch to Another Household Member-
Submit
Client Information
Service Transactions
Service Transaction Dashboard
Add Need
Add Service
Add Multiple Services
Add Referrals
View Previous Service Transactions
View Shelter Stays
View Entire Service History


Scans
Reports
Admin
Logout
Collapse
To include Household members for this Service, click the box beside each name. Only members from the SAME H
selected.
(77344) Single
(263826) Kitty, Hello (Left Household: 05/01/2018) (Primary Client)
(115045) Couple w. Dependent Children
(284320) Frehley, Paul Daniel
(263826) Kitty, Hello (Primary Client)
(100) Squarepants, Spongebob
Service Provider *
Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487)
Creating User
Kristin Murley
Start Date *
09 / 01 / 2024
8 : 00 : 00 AM
End Date
Service Type *
-Select-
Look Up
Provider Specific Service
-Select-
Save & Continu


Reports
Admin
Logout
Collapse
Include Additional Household Members
Service Provider *
Kentucky Housing Corporation-CoC Rural-Housing Connector-SSO-BOS (3487)
Creating User
Kristin Murley
Start Date *
09 / 01 / 2024
8 : 00 : 00 AM
End Date
09 / 01 / 2024
12 : 00 : 00 PM
Service Type *
Case/Care Management (PH-1000)
Provider Specific Service
Outreach services
Service Notes
Met with the client for the first time at the park. Discussed her housing history and current needs and barriers.
Moving On Assistance
-Select-
Service Costs
Number of Units
1
Unit Type
-Select-
Cost per Unit
Total Cost of Units
$


Funding Sources
Source
Amount
Add Funding Source
Calculate
Total: $0.00
Support Documentation
Date Added
Name
Description
Type
Add Support Documentation
No matches.
Follow Up Information
Projected Follow Up Date
Follow Up User
Kentucky Housing Corporation - BOS (39)
-Select-
Search
My Provider
Clear
Follow Up Made
-Select-
Completed Follow Up Date
Need Information
Need Status*
Identified
Outcome of Need
-Select-
If Need is Not Met, Reason
-Select-
Save
Save & Exit
Exit

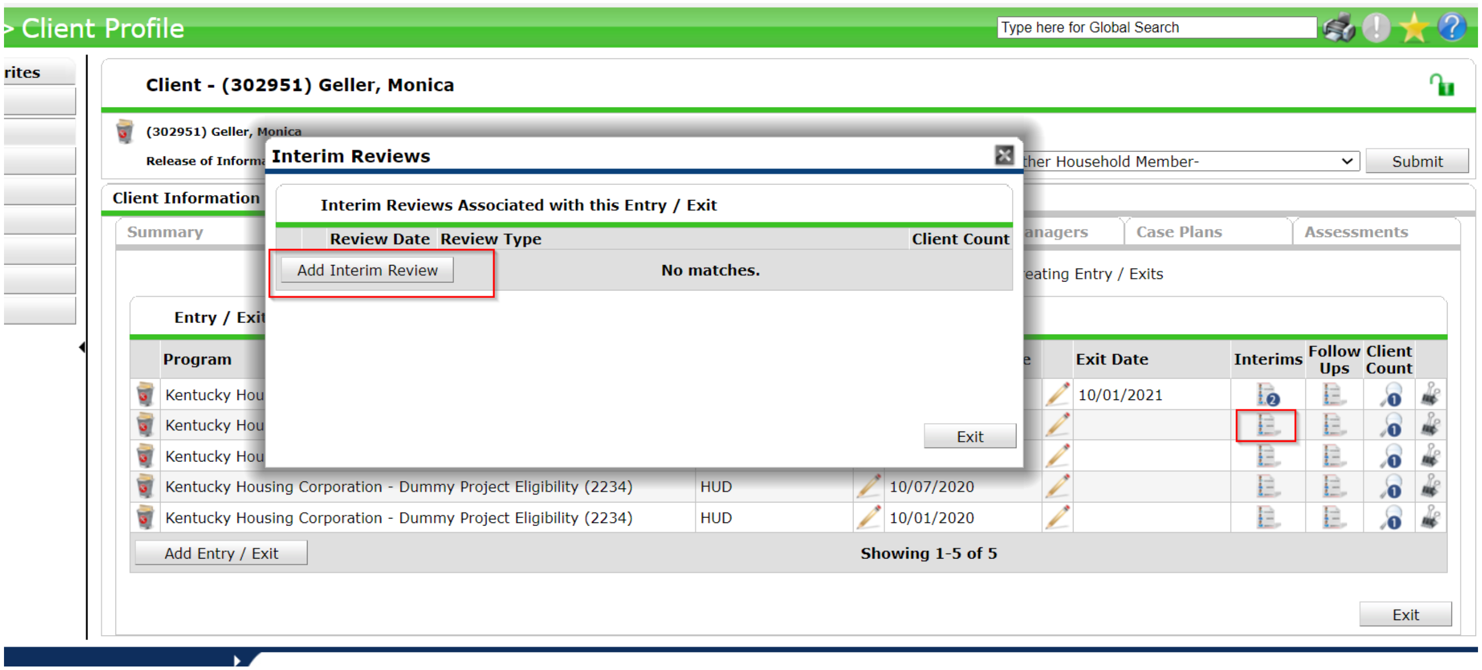
NOTE: Interims are used to update income, non-cash benefits, health insurance, and disabilities while the client is active in the project. Interims can only be conducted when a client is active in a Project.

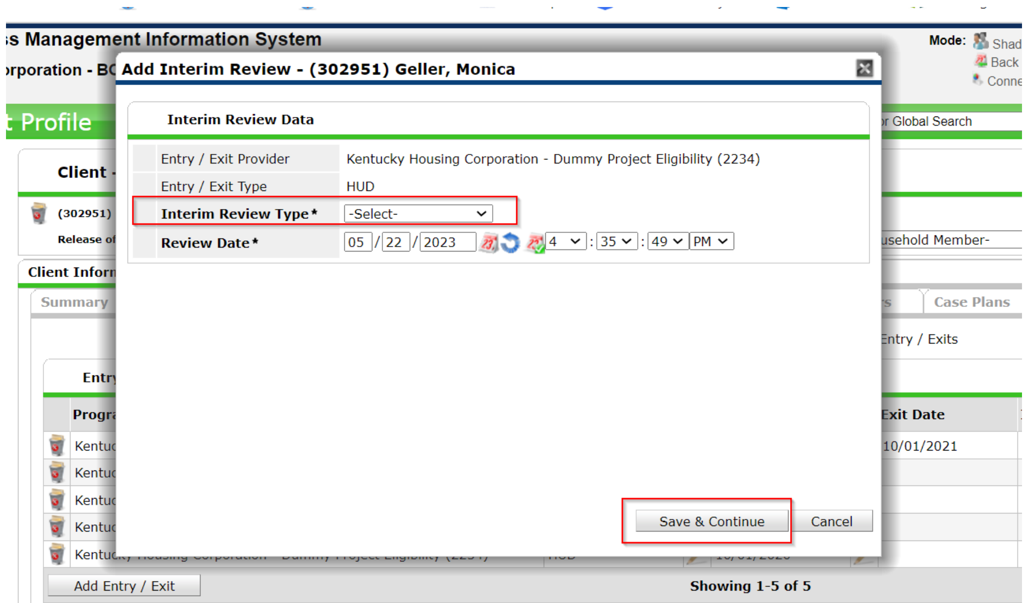
NOTE: Interims are also used to update housing move-in date (only entered for all Rapid Re-Housing (RRH), Permanent Housing (PH) & Permanent Supportive Housing (PSH) project clients if paying financial assistance.

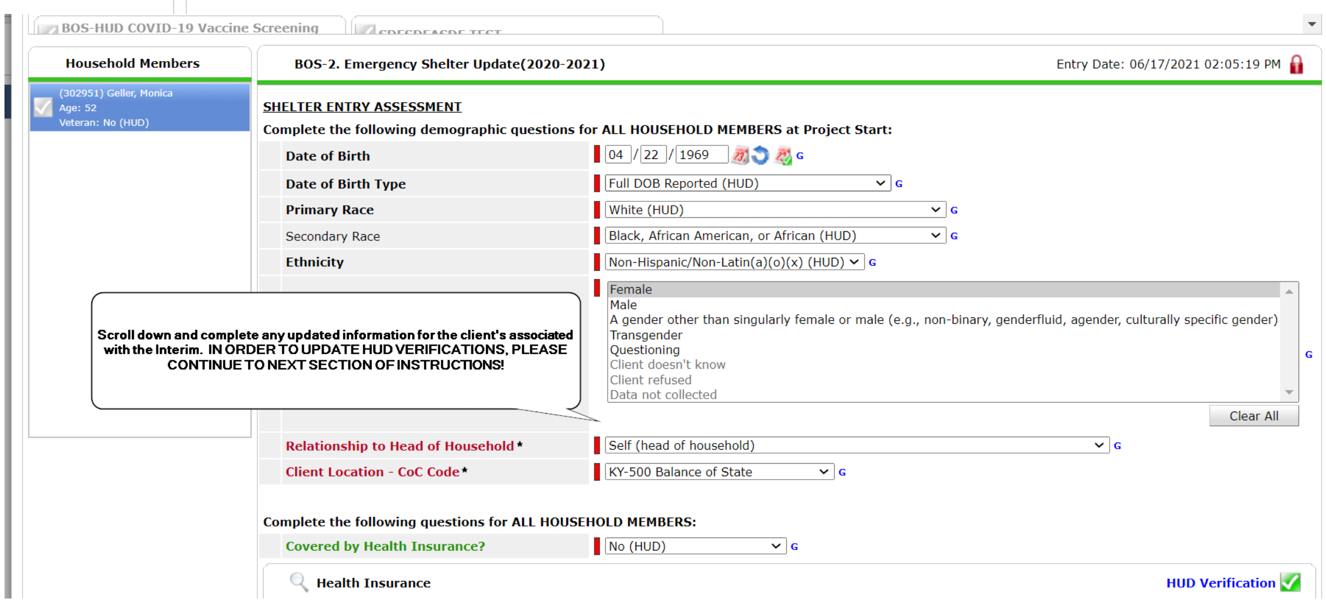
NOTE: Annual Assessments are due yearly within 30 days before/after project start. Please check with your Grants Management team or System Administrator to see if Annual Assessments are required for your project(s).
DO NOT update information on project start/entry. Entry Assessments only reflect the client status as of entry (project start). If data needs to be updated after that point in time, it should be done via Interim instead.

Interims: (Updating Active Client Data) (Annual Re-certifications)	
	Search for the Client or use Client I.D. to open the record of the Head of Household (*HoH*).
	NOTE: You always want to start/navigate from the Head of Household's profile when entering data and making updates/changes.
	Click on the "Entry / Exit" tab.
	NOTE: You will see the entry into your Project and may see entries into other Projects. Find the "Interims" column on the subheadings.
	Click on the notepad icon under the subheading "Interims" for the correct project entry.
	Click "Add Interim Review".
	Check the boxes of the client/household that will be included in this Interim. If it is the entire household, simply check the box next to the household I.D. • For Annual Assessments- the entire household will need to be checked. • For Updates- only select the members who have had a change (not children if nothing has changed, etc.)
	Select the "Interim Review Type". This can be an Update or an Annual Assessment.
	NOTE: Make sure the provider is correct, the type of entry is always HUD (unless a PATH, RHY, or VA-funded project), and the time and date are reflective of the date the client/household entered the Project. If you are in Back Date Mode & correctly following the workflow all this information will not have to be corrected here. If this information is not correct, the workflow is incorrect. Please click "cancel" and check the EDA and Back Date mode.
	Click "Save and Continue".
	(Continued on next page…)

	(Continued from previous page…)
	Complete/update Interim Assessment data entry for each member of the household that is included in this review. ***NOTE: See additional instructions below for how to update HUD Verifications when you need to make a change.*** After each member click "Save". Click on the next member to complete from left-hand menu (*current member will be highlighted blue*) and then click "Save". ***NOTE: After each member is complete, their check mark will appear green.***
	Click "Save and Exit" when complete.
	NOTE: An interim count of (1) will appear in the interim column of the project entry line in which you just added the interim. This number (1) will change with the number of interim assessments that are completed while the client/household is in the Project.




Add Interim Review - (302951) Geller, Monica
Interim Review Data
Entry / Exit Provider
Kentucky Housing Corporation - Dummy Project Eligibility (2234)
Entry / Exit Type
HUD
Interim Review Type *
-Select-
Review Date *
05 / 22 / 2023
4 : 35 : 49 PM
Save & Continue
Cancel
Add Entry / Exit
Showing 1-5 of 5

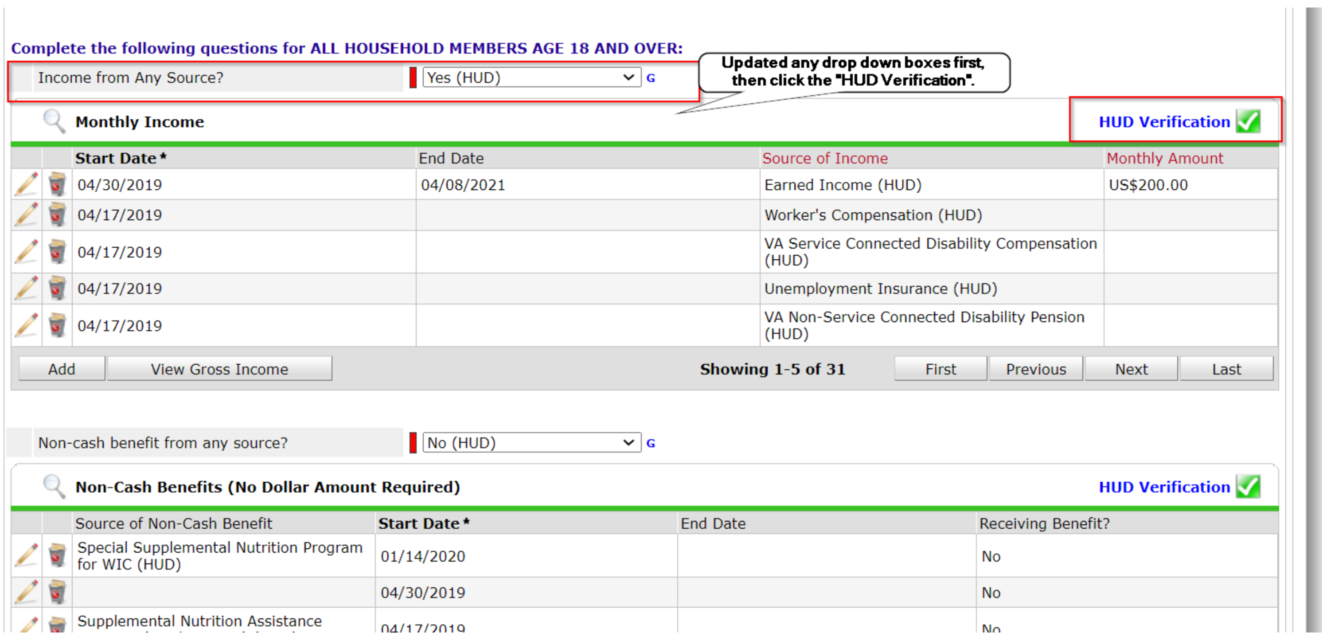

Household Members
(302951) Geller, Monica
Age: 52
Veteran: No (HUD)
BOS-2. Emergency Shelter Update(2020-2021)
Entry Date: 06/17/2021 02:05:19 PM
SHELTER ENTRY ASSESSMENT
Complete the following demographic questions for ALL HOUSEHOLD MEMBERS at Project Start:
Date of Birth
04 / 22 / 1969
Date of Birth Type
Full DOB Reported (HUD)
Primary Race
White (HUD)
Secondary Race
Black, African American, or African (HUD)
Ethnicity
Non-Hispanic/Non-Latin(a)(o)(x) (HUD)
Female
Male
A gender other than singularly female or male (e.g., non-binary, genderfluid, agender, culturally specific gender)
Transgender
Questioning
Client doesn't know
Client refused
Data not collected
Clear All
Scroll down and complete any updated information for the client's associated with the Interim. IN ORDER TO UPDATE HUD VERIFICATIONS, PLEASE CONTINUE TO NEXT SECTION OF INSTRUCTIONS!
Relationship to Head of Household *
Self (head of household)
Client Location - CoC Code *
KY-500 Balance of State
Complete the following questions for ALL HOUSEHOLD MEMBERS:
Covered by Health Insurance?
No (HUD)
Health Insurance
HUD Verification

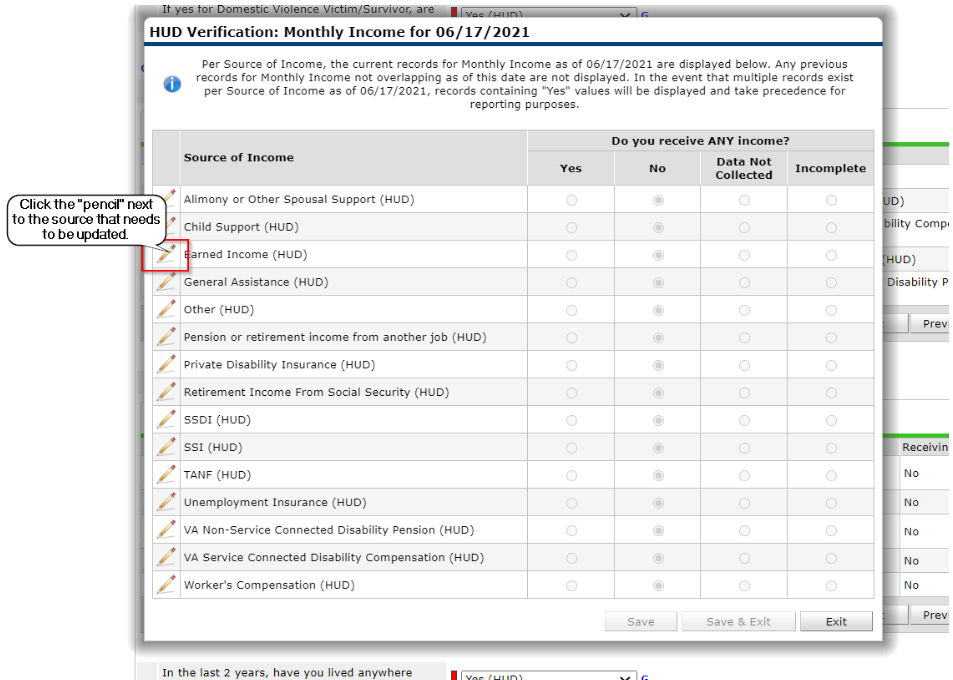
NOTE: These steps are followed when changes/updates to the client(s) HUD Verifications (Income, Disability, Insurance & Non-Cash Benefits). If you are updating other information, you do not need to follow these steps. Just follow the basic Interim steps above.

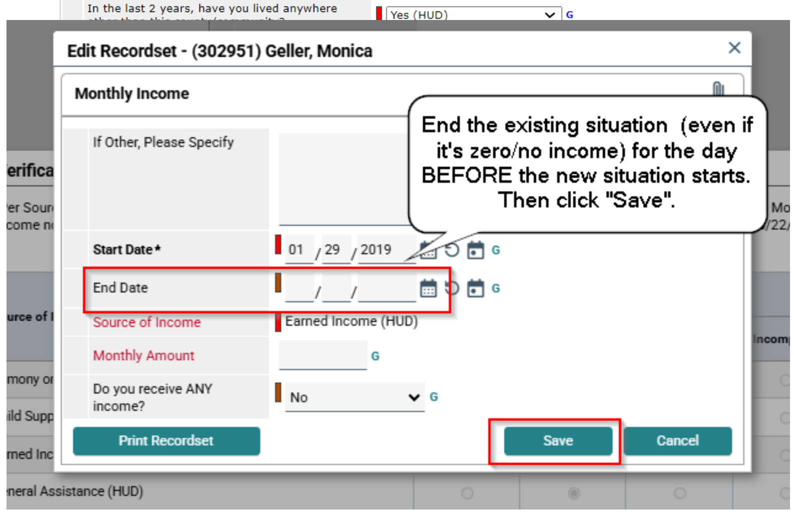
NOTE: When a client leaves housing- Don't Remove the Move-In Date! The original move-in date was still a lot of work! HUD says: Exit the client and start a new Entry if the housing search resumes. There should be separate entries recorded for separate housing efforts.

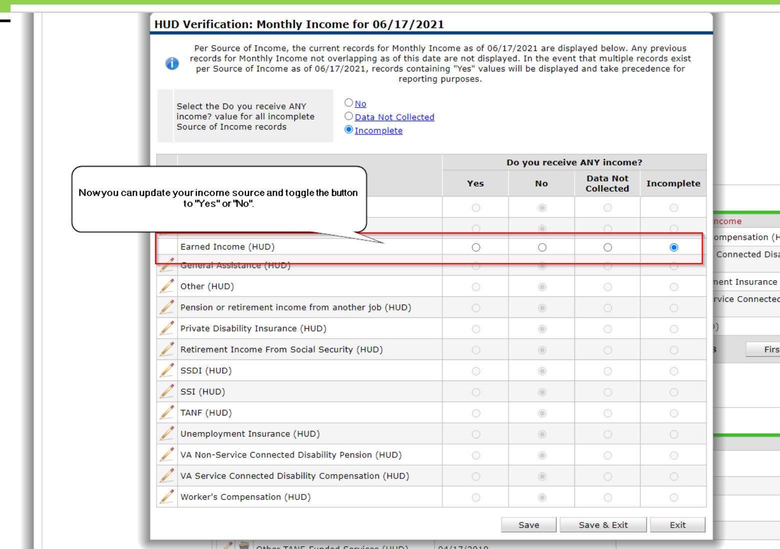
	Interims Continued: Updating changes to HUD Verifications (Income, Disability, Insurance, & Non-Cash Benefits)
	Follow steps above to add Interim review & select Interim Review Type. Click "Save & Continue".
	Scroll down to the HUD Verification section you are needing to update/change.
	Update the drop-down box above the HUD Verification (*i.e., Covered by Health Insurance? Does the client have disability? Does the client have any income? Etc.)*
	NOTE: Whenever a client has a change in the type of insurance, disabilities, income or non-cash benefits, the previous situation prior to that change should be ended with an end date that corresponds to the day before the new situation takes place. This is true even if they were not receiving income, insurance, etc., and then they start receiving it). Then, their new situation should be added separately afterwards.
	To update HUD Verification, click "HUD Verification" and select the pencil next to the source that needs to be updated (*ex. Medicaid insurance, Mental Health disability, Earned income, etc.*). End the prior situation (*ex: Earned income*) by entering an End Date (*must be the day before the new situation starts*) and then updating the "Do you receive ANY income, insurance, etc.?" and clicking "Save". • If "yes" they are still receiving (*ex: income*): Toggle over to the "Yes" column & a new record set will pop up for you to record the new source/amount. Complete the information including start date (*should be the day after the old situation ended*). Click "Save", and then "Save & Exit". • If "no" they are not still receiving (*ex: income*): All dots should be toggled to the "No" column. Click "Save & Exit". After scrolling down & updating anything that changed for each member, click "Save" at the bottom of the screen. ***NOTE: Make sure the time and date are reflective of the date the client/household had an update/change. If you are correctly following the workflow all this information will not have to be corrected here. If this information is not correct, the workflow is incorrect. Please click "cancel" and check the EDA and Back Date mode.*** ***(Continued on next page…)***

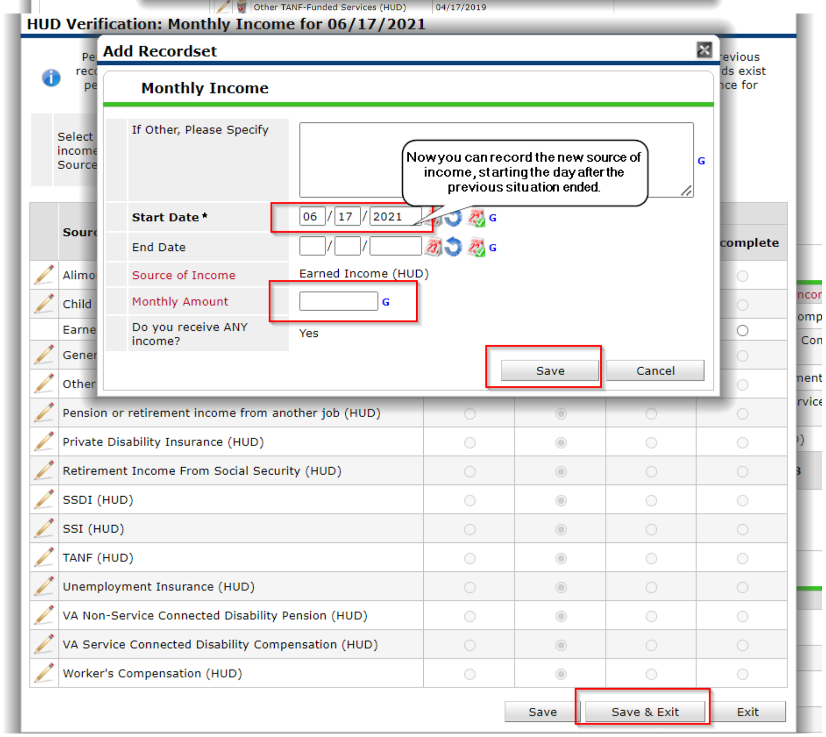
	(Continued from previous page..)
	Click on the next member from left-hand menu (*current member will be highlighted blue*) and repeat steps above, then click "Save".
	NOTE: After each member is complete, their check mark will appear green. This information must reflect the client's status when they exited the Project.
	Click "Save and Exit" when complete.



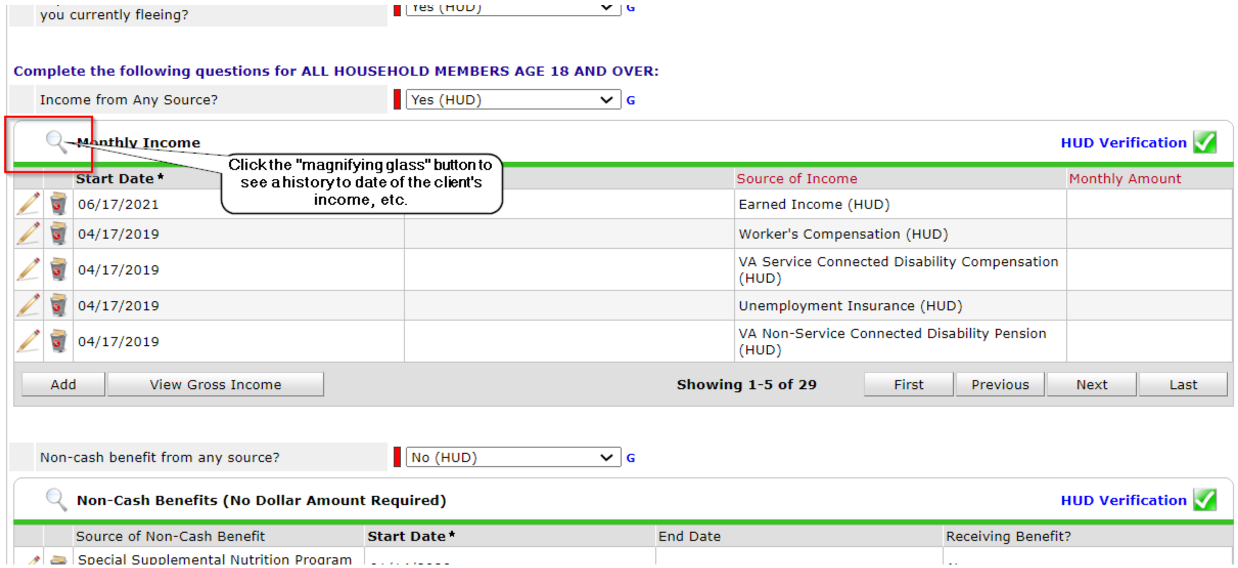

HUD Verification: Monthly Income for 06/17/2021
Per Source of Income, the current records for Monthly Income as of 06/17/2021 are displayed below. Any previous records for Monthly Income not overlapping as of this date are not displayed. In the event that multiple records exist per Source of Income as of 06/17/2021, records containing "Yes" values will be displayed and take precedence for reporting purposes.
Source of Income
Do you receive ANY income?
Yes
No
Data Not Collected
Incomplete
Alimony or Other Spousal Support (HUD)
Child Support (HUD)
Earned Income (HUD)
General Assistance (HUD)
Other (HUD)
Pension or retirement income from another job (HUD)
Private Disability Insurance (HUD)
Retirement Income From Social Security (HUD)
SSDI (HUD)
SSI (HUD)
TANF (HUD)
Unemployment Insurance (HUD)
VA Non-Service Connected Disability Pension (HUD)
VA Service Connected Disability Compensation (HUD)
Worker's Compensation (HUD)
Save
Save & Exit
Exit
Click the "pencil" next to the source that needs to be updated.

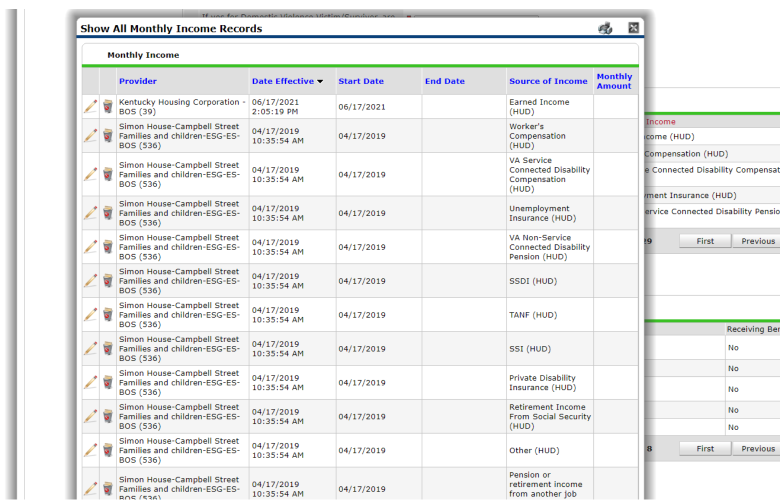

Edit Recordset - (302951) Geller, Monica
Monthly Income
If Other, Please Specify
Start Date*
01 / 29 / 2019
End Date
Source of Income
Earned Income (HUD)
Monthly Amount
Do you receive ANY income?
No
Print Recordset
Save
Cancel
End the existing situation (even if it's zero/no income) for the day BEFORE the new situation starts. Then click "Save".


HUD Verification: Monthly Income for 06/17/2021
Now you can update your income source and toggle the button to "Yes" or "No".
Do you receive ANY income?
Yes
No
Data Not Collected
Incomplete
Earned Income (HUD)
Other (HUD)
Pension or retirement income from another job (HUD)
Private Disability Insurance (HUD)
Retirement Income From Social Security (HUD)
SSDI (HUD)
SSI (HUD)
TANF (HUD)
Unemployment Insurance (HUD)
VA Non-Service Connected Disability Pension (HUD)
VA Service Connected Disability Compensation (HUD)
Worker's Compensation (HUD)
Save
Save & Exit
Exit


HUD Verification: Monthly Income for 06/17/2021
Add Recordset
Monthly Income
If Other, Please Specify
Now you can record the new source of income, starting the day after the previous situation ended.
Start Date *
06 / 17 / 2021
End Date
Source of Income
Earned Income (HUD)
Monthly Amount
Do you receive ANY income?
Yes
Save
Cancel
Save
Save & Exit
Exit

NOTE: You can see a history of the client's insurance, disabilities, income, and non-cash benefits to date by clicking the "magnifying glass" button by the HUD Verification (near window/snapshot of sources).

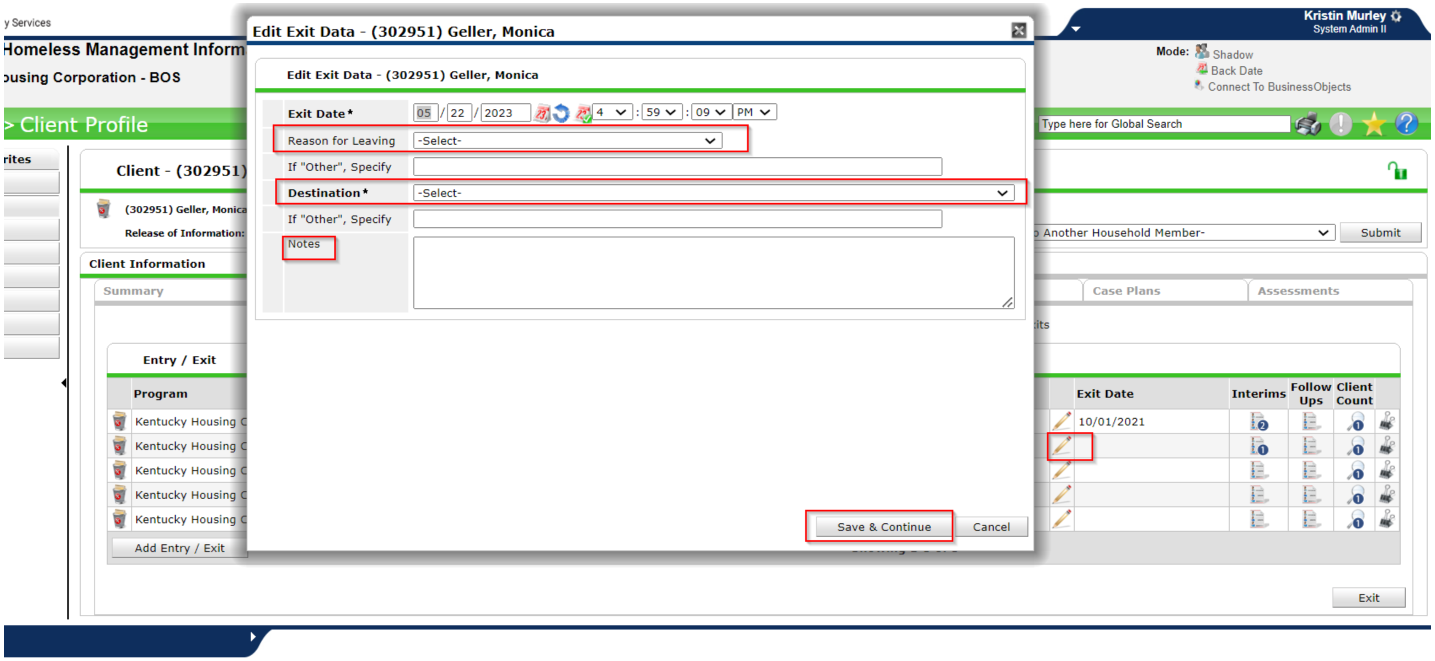




	Project Exit
	Search the client or use the client I.D. to locate the head of household (*HoH*) record.
	Click on "Entry / Exit" tab.
	Find the correct entry for the Project and then locate the pencil in the column with the sub heading of "Exit Date".
	Click the pencil.
	Check the boxes of the client/household that will be included in this exit. Households can be exited together or certain members can leave before others. If this exit is for the entire household, simply check the box next to the household I.D.
	NOTE: Make sure the time and date are reflective of the date the client/household exited the Project. If you are correctly following the workflow all this information will not have to be corrected here. If this information is not correct, the workflow is incorrect. Please click "cancel" and check the EDA and Back Date mode.
	Complete the information regarding the reason and destination of the client/household.
	NOTE: All persons exited together will have the same reason and destination. If they do not, do not exit them together on this screen, go into each client's record and exit them individually.
	Click "Save and Continue".
	Complete exit assessment data entry for each member of the household. You will notice that only those household members exiting will appear on the left side of the screen for a choice in entering information. After each member click "Save". Click on the next member to complete and then click "save".
	NOTE: After each member is complete, their check mark will appear green. This information must reflect the client's status when they exited the Project.
	Click "Save and Exit" when complete.
	If the client has also left the household, you will need to go to the "Households" tab and follow the instructions on page 7 of this document for removing a client from a household.

NOTE: When a client leaves housing- Don't Remove the Move-In Date! The original move-in date was still a lot of work! HUD says: Exit the client and start a new Entry if the housing search resumes. There should be separate entries recorded for separate housing efforts.

NOTE: When the Head of Household leaves the Project/Household, there are special considerations. A new Head of Household must be set. You must update the "Relationship to Head of Household" question on the original Project Entry, and update the Household tab.


Edit Exit Data - (302951) Geller, Monica
Exit Date *
Reason for Leaving
If "Other", Specify
Destination *
If "Other", Specify
Notes
Save & Continue
Cancel