

KYHMIS 104: Removing the Client from Household, adding Interims, adding Housing Move-In Date (HMID), & Exiting Clients

Removing clients from a household
Interim updates
Housing Move-In Date
Exiting Clients

Removing a Client from Household

2

"Search" the client's name or Client ID# that you are wanting to remove from the Household.

Clients

Resources

Shelters

Scans

Reports

Admin

Logout

Collapse <<

Name	john	smith
Name Data Quality	-Select-	
Alias		
Social Security Number		
Social Security Number Data Quality	-Select-	
U.S. Military Veteran?	-Select-	
Exact Match	<input type="checkbox"/>	

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

ID	Name
21	Smith, Jean Mary, Mrs.

3

Click on the pencil next to the client's name to open back up their Client Record.

Client Search

Please Search the System before adding a New Client.

Name: First Middle Last Suffix

Name Data Quality:

Alias:

Social Security Number:

Social Security Number Data Quality:

U.S. Military Veteran?:

Exact Match: ☐

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

ID	Name	Social Security Number	Date of Birth
21	Smith, Jean Mary, Mrs.	403-87-6300	1977
23	Smith, John Jo	123-45-6789	1980
20	Smith, John Paul, Mr	402-87-8600	1975

Showing 1-3 of 3

4

Select the Entry/Exit tab.

Typ

Date: 01/01/2014 8:00:00 AM

-Switch to Another Household Member-

Service Transactions

Households ROI Entry / Exit Case Managers Case Plans

Social Security ***-**-6789

U.S. Military Veteran? No (HUD)

Entry/Exits

Program	Start Date	End Date	Type
---------	------------	----------	------

- 5 Click on the pencil next to the "Exit Date" for your program.







Date: 01/01/2014 8:00:00 AM

-Switch to Another Household Member- Submit

Service Transactions

Entry / Exit Case Managers Case Plans Assessments

shed on Households tab before creating Entry / Exits

Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
HUD	 12/01/2012				 

Showing 1-1 of 1

Exit

- 6 Make sure that only the client(s) that are leaving the program are checked.

es

BOS

Clients > Client Profile

- (23) Smith, John Jo

(23) Smith, John Jo

Release of Information: Ends 07/02/2014


Information

Summary Client Profile

Entry / Exit

Edit Exit Data - (23) Smith, John Jo

Household Members

 To update Household membe




☐ (10) Couple w. Dependent Children

☒ (23) Smith, John Jo

☐ (106) Smith, Baby Mae

☐ (92) Smith, Sally Sue

Edit Exit Data - (23) Smith, John Jo

Exit Date *	01 / 01 / 2014    8 : 00
Reason for Leaving	-Select-
If "Other", Specify	
Destination *	-Select-

7

Client Profile	
Smith, John Jo	
John Jo	
Information: Ends 07/02/2014	
in	
	Client Profile
t	
n	
y Housing Corporation - Dummy Project Eligibility (2234)	
Entry / Exit	

8

BOS	
Clients > Client Profile	
: - (23) Smith, John Jo	
(23) Smith, John Jo	
Release of Information: Ends 07/02/2014	
Information	
Summary	Client Profile
Entry / Exit	
Program	
<input checked="" type="checkbox"/>	Kentucky Housing Corporation - Dummy Project Eligibility (2234)
Add Entry / Exit	

9 Enter the "Destination".

John Jo

Release of Information: Ends 07/02/2014

Client Profile

Exit

ing Corporation - Dummy Project Eligibility (2234)

☒ (23) Smith, John Jo
☐ (106) Smith, Baby Mae
☐ (92) Smith, Sally Sue

Edit Exit Data - (23) Smith, John Jo

Exit Date *	01 / 01 / 2014	8 : 00 : 00 AM
Reason for Leaving	Disagreement with rules/persons	
If "Other", Specify		
Destination *	-Select-	
If "Other", Specify		
Notes		

10 **IMPORTANT:** If the "Destination" is one of the options "with ongoing housing subsidy (HUD)", then you will need to select the "Rental Subsidy Type" from the dependent drop-down box.

Client - (23) Smith, John Jo

(23) Smith, John Jo
Release of Information: Ends 07/02/2014

Client Information

Summary Client Profile

Entry / Exit

Program

Kentucky Housing Corporation - Dummy Project Eligibility (2234)

Add Entry / Exit

☐ (10) Couple w. Dependent Children
☒ (23) Smith, John Jo
☐ (106) Smith, Baby Mae
☐ (92) Smith, Sally Sue

Edit Exit Data - (23) Smith, John Jo

Exit Date *	01 / 01 / 2014	8 : 00 : 00 AM
Reason for Leaving	Disagreement with rules/persons	
If "Other", Specify		
Destination *	Rental by client, with ongoing housing subsidy (HUD)	
If "Other", Specify		
Rental Subsidy Type	-Select-	
Notes		

Save & Continue

-Select-
GPD TIP housing subsidy
VASH housing subsidy
RRH or equivalent subsidy
HCV voucher (tenant or project based) (not dedicated)
Public housing unit
Rental by client, with other ongoing housing subsidy
Housing Stability Voucher
Family Unification Program Voucher (FUP)
Foster Youth to Independence Initiative (FYI)
Permanent Supportive Housing
Other permanent housing dedicated for formerly homeless persons

11 Click "Save & Continue".

A screenshot of a web application interface. A modal dialog box is open, featuring a large text input area at the top, a dropdown menu, and two buttons at the bottom: 'Save & Continue' (highlighted with an orange circle) and 'Cancel'. The background shows a form with a table containing an 'Exit Date' column and a pencil icon in one of the rows.

12 Next, select the "Households" tab.

A screenshot of a web application interface showing the 'Households' tab selected in a client profile. The page has a light green header. Below it, the breadcrumb 'Client Profile' is visible. The main content area shows the client's name '3) Smith, John Jo' and a green bar with the text 'Smith, John Jo' and 'Date of Information: Ends 07/02/2014'. A tabbed interface at the bottom includes 'nation', 'Client Profile', 'Households' (highlighted with an orange circle), 'ROI', and 'Entry / Exit'. A blue bar at the bottom contains the text 'Add Entry / Exit'.

Program	Type
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	HUD

13 Then select "Manage Household".

The screenshot shows a web application interface with a dark sidebar on the left containing navigation links: Home, Clients, Resources, Shelters, Scans, Reports, Admin, and Logout. The main content area is titled '(23) Smith, John Jo' with a sub-header 'Release of Information: Ends 07/02/2014'. Below this is a 'Client Information' section with tabs for Summary, Client Profile, Households, ROI, and Entry / Exit. The 'Households' tab is active, displaying a list of households under the heading '(10) Couple w. Dependent Children'. The list includes three entries: (23) Smith, John Jo, (106) Smith, Baby Mae, and (92) Smith, Sally Sue. A 'Manage Household' button is highlighted with an orange circle. Below the list is a 'Previous Households' section with buttons for 'Search Existing Households' and 'Start New Household'.

14 Click on the red minus sign to the left of the client that is leaving the household.

The screenshot shows a detailed view of the household information for '(10) Couple w. Dependent Children'. The page includes a sidebar with 'Community Services' and 'Point Training Site' information. The main content area is titled 'Household Information - (10) Couple w. Dependent Children'. It features a 'Household Type' dropdown set to 'Couple w. Dependent Children', an 'Income' field set to 'US\$0.00', and a 'Client Count' of 3. Below this is a 'Household Members' table with columns: Name, Age, Head of Household, Relationship to Head of Household, and Joined Household. The table lists three members: (23) Smith, John Jo (Age 34, Head of Household, Self, Joined 12/01), (106) Smith, Baby Mae (Age 0, No, daughter, Joined 07/02), and (92) Smith, Sally Sue (Age 33, No, wife, Joined 12/01). A red minus sign is highlighted with an orange circle next to the first member. Below the table is an 'Add/Delete Household Members' button. Further down is a 'Previous Household Members' section and an 'Individual Client Assessment' section. The 'Individual Client Assessment' section has two tabs: 'Household Members' and 'Client Record'. The 'Household Members' tab is active, showing a list of members with a red minus sign next to (23) Smith, John Jo. The 'Client Record' tab shows details for (23) Smith, John Jo, including Name, Age, and Name Data Quality.

15 A pop-up window will open.

Enter the date that the client left the household.

Once the date has been entered, click "Save".

The screenshot displays a software interface with a 'Client Left Household' pop-up window. The window has a title bar with a close button (X). Inside, there is an information icon (i) followed by a warning: 'By removing this Client from the Household you will no longer be able to associate them with Household information including Goals, Case Notes, Case Managers, Shelter Stays, and Service Transactions after this date.' Below this, it says 'Please select the date the Client left the Household.' There is a date selection field labeled 'Date Client Left Household *' with the date '01 / 01 / 2014' and a calendar icon. At the bottom of the window are two buttons: 'Save' (highlighted with an orange circle) and 'Cancel'. The background interface shows a client profile for 'Smith, Sally Sue' with fields for age (33), gender (No), relationship (wife), and date of birth (12 / 01 / 2012). There are tabs for 'Household Members' and 'Household History Report'. A table on the right shows household members with columns for Age and H. Below the pop-up, there is a section for 'Social Security' with fields for 'SSN Data Quality' (Full SSN Reported (HUD)), 'U.S. Military Veteran?' (No (HUD)), and 'Age' (34). There is also a 'Household Profile Assessment' section with the text 'No Household Profile Assessment is specified for this Provider'.

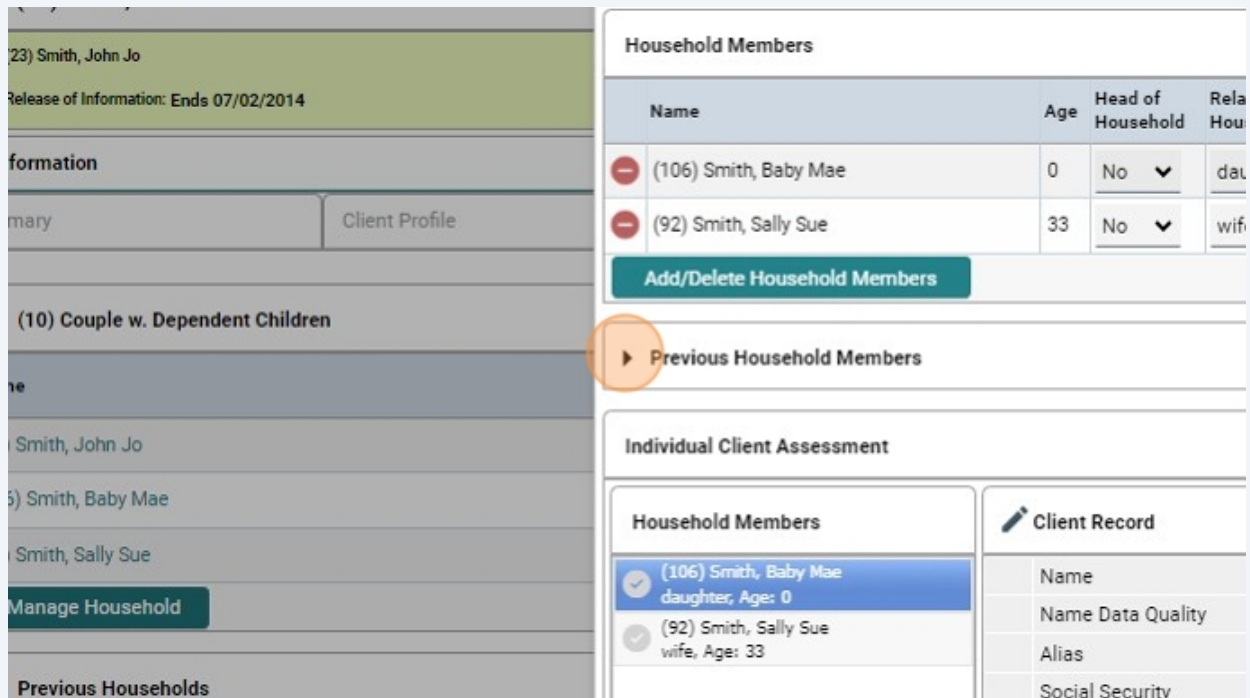


Tip!

You do not have to be in Back Date mode to enter your Exit date.

16

Clicking on the right arrow next to the "Previous Household Members", you can see the former members of the household.



Household Members

Name	Age	Head of Household	Relationship to Head of Household
(106) Smith, Baby Mae	0	No	daughter
(92) Smith, Sally Sue	33	No	wife

Add/Delete Household Members

Previous Household Members

Individual Client Assessment

Household Members

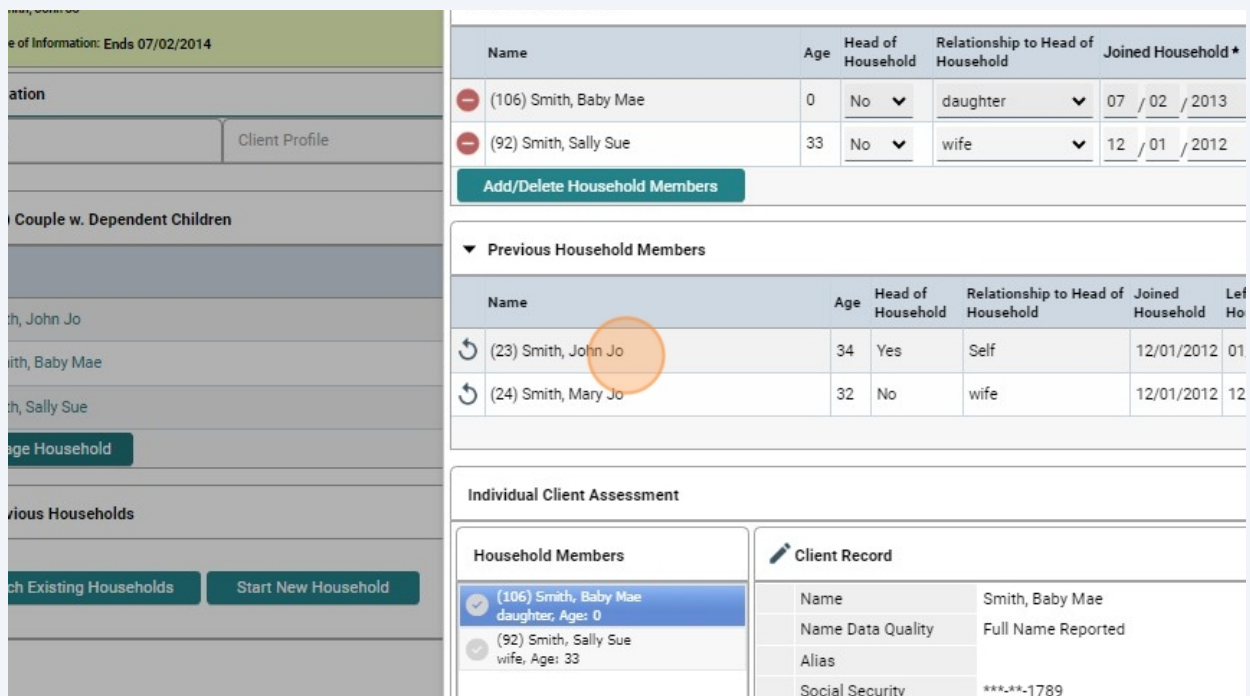
(106) Smith, Baby Mae daughter, Age: 0
(92) Smith, Sally Sue wife, Age: 33

Client Record

Name
Name Data Quality
Alias
Social Security

17

To add the client back in the Household, you can click on the curved arrow.



Previous Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Left Household *
(23) Smith, John Jo	34	Yes	Self	12/01/2012	01
(24) Smith, Mary Jo	32	No	wife	12/01/2012	12

Individual Client Assessment

Household Members

(106) Smith, Baby Mae daughter, Age: 0
(92) Smith, Sally Sue wife, Age: 33

Client Record

Name	Smith, Baby Mae
Name Data Quality	Full Name Reported
Alias	
Social Security	***-**-1789

18

Once you have removed the client from the household, review the "Household Information" and update any information as needed.

You may need to change your "Household Type" and/or "Head of Household".

Household Information - (10) Couple w. Dependent Children

(10) Couple w. Dependent Children Save Save

Household Type * Couple w. Dependent Children ▼

Income US\$0.00 🔍

Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *
(106) Smith, Baby Mae			Child Under 18	07 / 02 / 2013
(92) Smith, Sally Sue			Couple	12 / 01 / 2012

Add/Delete Household Member

- Select-
- Caregiver
- Child Under 18
- Couple
- Couple (Parent & Friend) and Child
- Couple w. Dependent Children**
- Couple With No Children
- Female Single Parent
- Foster Parent(s)
- Grandparent(s) and Child
- Male Single Parent

▶ Previous Household Members

19

Click "Save & Exit" when finished.

Security ****-**-1789

ata Quality Full SSN Reported (HUD)

ilitary Veteran? No (HUD)

0

I Profile Assessment

old Profile Assessment is specified for this Provider

Save Save & Exit Exit



Alert!

Whenever the original Head of Household (HoH), or eligible client, leaves the Household and/or Program, a new Head of Household must be set.

Head of Household Leaves: Special Considerations

Update Project Entry: "Relationship to Head of Household" Question

20

In the new Head of Household's Client Record, click on the "Entry/Exit" tab.

Click on the pencil icon by the "Project Start Date" to open the Entry back up for edits.

The screenshot shows a web application interface for managing client records. At the top, there is a search bar labeled 'Type here for Global Search' and a date field showing 'Date: 01/01/2014 8:00:00 AM'. Below this is a navigation bar with tabs: 'Households', 'ROI', 'Entry / Exit' (which is selected), 'Case Managers', 'Case Plans', and 'Assessments'. A reminder message states: 'Reminder: Household members must be established on Households tab before creating Entry / Exits'. The main content area displays a table with the following data:

Type	Project Start Date	Exit Date	Client Count
ny Project Eligibility (2234)	HUD	12/01/2012	2

A pencil icon is positioned next to the 'Project Start Date' '12/01/2012', and this area is circled in orange. At the bottom of the table, it says 'Showing 1-1 of 1'. There is an 'Exit' button at the bottom right of the interface.

21 Click "Save & Continue"

☐ (10) Single w. Dependent Children
☒ (23) Smith, John Jo /Entry Date: 12/01/2012 8:00 AM
☒ (24) Smith, Mary Jo /Entry Date: 12/01/2012 8:00 AM

Include Additional Household Members

Edit Project Start Data - (24) Smith, Mary Jo

Provider	Kentucky Housing Corporation - Dummy Project Eligibility (2234)
Type	HUD
Project Start Date *	12 / 01 / 2012

Save & Continue Cancel

Showing 1-1 of 1

Exit

22 Update the "Relationship to Head of Household" question to set the new HoH.

For example, here we click on the wife Sally Sue and update her to be the new "Self (Head of Household)".

☒ (23) Smith, John Jo
☒ (92) Smith, Sally Sue
☒ (106) Smith, Baby Mae

Include Additional Household Members

Showing 1-3 of 3

Entry Assessment

Select an Assessment

☒ BOS- HUD CoC & ESG RRH Entry (FY2024)
 ☒ BOS- HUD CoC & ESG RRH Update (FY2024)
 ☒ BOS- HUD CoC & ESG & TBRA Exit (FY2024)

Household Members

BOS- HUD CoC & ESG RRH Entry (FY2024) Entry Date: 12/01/2012 08:00

SECTION 1: INCOME

Enrollment CoC KY-500 Balance of State
 Relationship to Head of Household Self (head of household)
 Housing Move-in Date
 Based on the housing move-in date above, what county was the client housed in?
 Unit Address
 Unit City
 Unit Zip

23

Then, we clicked on John Jo and updated him to be the "Head of Household's spouse or partner".

Include Additional Household Members Showing 1-3 of 3

Entry Assessment Exit Assessment

Select an Assessment

☒ BOS- HUD CoC & ESG RRH Entry (FY2024) ☒ BOS- HUD CoC & ESG RRH Update (FY2024) ☒ BOS- HUD CoC & ESG & TBRA Exit (FY2024)

Household Members

- (23) Smith, John Jo
Age: 32
Veteran: No (HUD)
- (92) Smith, Sally Sue
Age: 32
Veteran: No (HUD)
- (106) Smith, Baby Mae
Age: -1
Veteran: No (HUD)

BOS- HUD CoC & ESG RRH Entry (FY2024) Entry Date: 12/01/2012 08:00:00

SECTION 1: INCOME

Enrollment CoC KY-500 Balance of State G

Relationship to Head of Household * Head of household's spouse or partner G

Housing Move-in Date / / G

Based on the housing move-in date above, what county was the client housed in? -Select- G

Unit Address -Select- G

Unit City -Select- G

Unit Zip Self (head of household) Head of household's child

24

"Save & Exit" when finished.

Client ever in the foster care system? Yes G

Zip Code of Last Permanent Address 42101 G

CLIENT LIVING HISTORY (in the last 2 years)

In the last 2 years, in what Kentucky county did you become homeless? Warren G

If you have lived in multiple Kentucky counties in the last 2 years, please select additional county: Adair G

If you have lived in another part of the US in the last 2 years, please specify state: California G

If other location in the last 2 years, please specify: G

In what Kentucky county are you currently staying? Adair G

Did you have housing when you came to this county/community? No (HUD) G

What is the primary reason you came to this county/community? Job Opportunities G

Save Save & Exit Exit

Entry/Exit Summary

Update Household

- 25 Next you will need to update the Head of Household via the "Households" tab.
- Click "Households".

ILSky | Community Services

ServicePoint Training Site

Kentucky Housing Corporation - BOS

March 18, 2025

Clients > Client Profile

Client - (92) Smith, Sally Sue

(92) Smith, Sally Sue

Release of Information: None

Client Information

Summary Client Profile **Households** ROI Entry / Exit Case Managers

Reminder: Household members must be established on Households tab before creating Entry / Exits

Entry / Exit

Program	Type	Project Status
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	HUD	12/01/20

Add Entry / Exit

Showing 1-1 of 1

Collapse <<

26 Click "Manage Household"

Client - (92) Smith, Sally Sue

(92) Smith, Sally Sue
Release of Information: None

Client Information

Summary Client Profile **Households** ROI Entry / Exit Case Man

▼ (10) Single w. Dependent Children

Name

(106) Smith, Baby Mae

(92) Smith, Sally Sue

Manage Household

► Previous Households

Search Existing Households Start New Household

27 Update the new Head of Household by updating the "Head of Household" and "Relationship to Head of Household" questions.

In this example, we updated the wife, Sally Sue, to be the Head of Household since her husband, who was the eligible client, left.

Community Services

Training Site

Sing Corporation - BOS

Clients > Client Profile

Client - (92) Smith, Sally Sue

(92) Smith, Sally Sue
Release of Information: None

Client Information

Summary

▼ (10) Single w. Dependent Children

Name

(106) Smith, Baby Mae

(92) Smith, Sally Sue

Manage Household

► Previous Households

Search Existing Households

Household Information - (10) Single w. Dependent Children

(10) Single w. Dependent Children

Save Save & Exit Exit

Household Type * Single w. Dependent Children

Income US\$0.00

Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(106) Smith, Baby Mae	0	No	daughter	07 / 02 / 2013	0	1
(92) Smith, Sally Sue	33	Yes	Self	12 / 01 / 2012	0	1

Add/Delete Household Members Household History Report

► Previous Household Members

Individual Client Assessment

Household Members

(106) Smith, Baby Mae
daughter, Age: 0

(92) Smith, Sally Sue
wife, Age: 33

Client Record

Name Smith, Sally Sue

Name Data Quality Full Name Reported

Alias

Social Security ***-**-4321

SSN Data Quality Full SSN Reported (HUD)

U.S. Military Veteran? No (HUD)

Issue ID Card

28 Click "Save & Exit"

Household Information - (10) Single w. Dependent Children

(10) Single w. Dependent Children Save **Save & Exit** Exit

Household Type * Single w. Dependent Children

Income US\$0.00

Client Count 2

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	Previous Associations	Household Count
(06) Smith, Baby Mae	0	No	daughter	07 / 02 / 2013	0	1
(2) Smith, Sally Sue	33	Yes	Self	12 / 01 / 2012	0	1

Delete Household Members Household History Report

Previous Household Members

Dual Client Assessment

Household Members

- (06) Smith, Baby Mae daughter, Age: 0
- (2) Smith, Sally Sue wife, Age: 33

Client Record Issue ID Card

Name	Smith, Sally Sue
Name Data Quality	Full Name Reported
Alias	
Social Security	***-**-4321
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	No (HUD)

Right Panel:

Kristin Murley System Admin II

Shadow Mode margaretsmith

Enter Data As

Back Date Mode 01/01/2014 8:00:00 AM

Type here for Global Search

Date: 01/01/2014 8:00:00 AM

-Switch to Another Household Member- Submit

Case Plans Assessments

Name	Relationship to Head of Household	Joined Household	Previous Associations	Household Count
daughter		07/02/2013	0	1
wife		12/01/2012	0	1

Exit

Interim Updates

- ### 29
- Used to update data for a client.
 - Used for Annual Assessments- required for ESG & CoC projects.
 - Any project that uses Entry/Exits can use Interim Updates.
 - To record an Interim Update for a particular period of time, use Back Date Mode.
 - Used to show increase in income for clients which is reported on System Performance Measures (SPM) reports to HUD.

Interim Reviews

30 Interim Reviews in Community Services:

- It may be required that you update information throughout a client's participation in a program (HUD programs, VA, etc.)
- Required Annual Assessments for clients participating in a program for more than 365 days (HUD programs).
- Annual Assessments should be completed during a 60-day window from the "Project Start/Entry Date" (30 days before & 30 days after).
- Annual Assessments include updating for both the Head of Household & any other family members at the same time.

31 To create Interim Reviews:

Go to the Client's Record.

Click on the "Entry/Exit" tab.

The screenshot displays a web application interface for a client record. At the top, there is a light green header bar. Below it, a white bar contains the date "Date: 05/01/2013 8:00:00 AM" and a link "-Switch to Another Household Member". The main interface features a tabbed navigation system with four tabs: "Households", "ROI", "Entry / Exit", and "Case Managers". The "Entry / Exit" tab is currently selected and highlighted with an orange circle. Below the tabs, a message states: "i This Client is not currently a member of any Households." The bottom of the screen shows several empty white rectangular boxes, likely for data entry or reporting.

32 Then, click the "File" icon with Interims for that Entry.

Date: 05/01/2013 8:00:00 AM

-Switch to Another Household Member- Submit

Service Transactions

Entry / Exit Case Managers Case Plans Assessments

shed on Households tab before creating Entry / Exits

Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
HUD	12/01/2012	01/01/2014			

Showing 1-1 of 1

Exit

33 The "Interim Reviews" pop-up will display.

Click "Add Interim Review".

12/01/2013

Service Transactions

Client Profile Households ROI Entry / Exit

Reminder: Household members must be established on Households tab before cr

Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Co
Add Interim Review No matches.		

Exit

34

Select all appropriate household members that should be included in the Interim Review.

ices

- BOS

Clients > Client Profile

nt - (23) Smith, John Jo

(23) Smith, John Jo

Release of Information: Ends 12/01/2013

Information

Summary Client Profile

Entry / Exit

Program

Kentucky Housing Corporation - Dummy Project Eligibility (2234)

Add Entry / Exit

Add Interim Review

No matches.

Add Interim Review - (23) Smith, John Jo

Household Members

To include Household members associated with the Entry / Exit for this Interim Review,

☐ (10) Single w. Dependent Children

☒ (23) Smith, John Jo (Entry Date: 12/01/2012 8:00 AM)

☒ (92) Smith, Sally Sue (Entry Date: 12/01/2012 8:00 AM)

Interim Review Data

Entry / Exit Provider	Kentucky Housing Corporation - Dummy Project Eligibility (
Entry / Exit Type	HUD
Interim Review Type *	-Select-
Review Date *	05 / 01 / 2013 8 : 00 : 00

35

Select the "Interim Review Type".

Household Members

To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name.

☐ (10) Single w. Dependent Children

☒ (23) Smith, John Jo (Entry Date: 12/01/2012 8:00 AM)

☐ (92) Smith, Sally Sue (Entry Date: 12/01/2012 8:00 AM)

Interim Review Data

Entry / Exit Provider	Kentucky Housing Corporation - Dummy Project Eligibility (2234)
Entry / Exit Type	HUD
Interim Review Type *	-Select-
Review Date *	05 / 01 / 2013 8 : 00 : 00 AM

Save & Continue Cancel

Add Interim Review

No matches.

Showing 1-1 of 1

36 Then click "Save & Continue".

The screenshot shows a software interface with a form on the left and a sidebar on the right. The form has the following fields:

- Exit Provider: Kentucky Housing Corporation - Dummy Project Eligibility (2234)
- Exit Type: HUD
- Review Type *: Update (dropdown menu)
- Date *: 05 / 01 / 2013 (calendar icon)

At the bottom of the form, there are two buttons: "Save & Continue" (highlighted with an orange circle) and "Cancel".

A modal window is open in the foreground with the text "No matches." and an "Exit" button.

The sidebar on the right contains the following elements:

- Date: 05/01/2013 8:00:00 AM
- Switch to Another Household Member-
- Case Managers
- Case Plans
- Exits
- Project Start Date: 12/01/2012

37 Complete Assessment questions as necessary.

If no changes need to be made- scroll down, then click "Save". Click on each household member (*from the left-hand menu, highlighted blue*), then click "Save". Each will display a green check mark once saved.

Click "Save & Exit"! At this time, an Interim will be automatically recorded as soon as you save.

For changes- see next slides.



Alert!

Special Note on Interim Reviews: Workflow for Updating Income, Benefits, Health Insurance & Disabilities (HUD Verification)

- **If Sub-Assessment Answers Exist (in the HUD Verification):**

- Click on the HUD Verification button.
- End Date any outdated (no longer true) answers by clicking the **pencil icon**. **Use the day prior to the new answer starting as the End Date.**

- **Note:** Regarding income- **leave the "Do you receive ANY income?" question alone. Do not overwrite the answer.**

- Record **updated answer** when prompted.
- If all answers are still accurate or none exist, proceed to the next step.
- **Note:** The HUD Verification icon may turn from green to a red triangle as end dates are entered.

- **Update HUD Verification:**

- If an answer is incomplete, select **"Yes"** or **"No"** as needed:
 - **Selecting "No"** auto-fills the response and start date.
 - **Selecting "Yes"** opens a pop-up with the start date and any additional HUD-required questions.

38

To make a change to income, first change the overall "Income from Any Source?" question (ex: change to "No").

SECTION 2: IF CLIENT IS A MINOR WHO IS NOT HEAD OF HOUSEHOLD STOP DATA ENTRY HERE

INCOME INFORMATION (required information)

Income from Any Source? **No (HUD)**

Monthly Income

Start Date *	End Date	Source of Income
12/01/2012		Worker's Compensation (HUD)
12/01/2012		VA Service Connected Disability Comper (HUD)
12/01/2012		VA Non-Service Connected Disability Per (HUD)
12/01/2012		Unemployment Insurance (HUD)
12/01/2012		TANF (HUD)

Add View Gross Income Showing 1-5 of 15 First Previo

Total Monthly Income 0

NON-CASH BENEFITS (required question)

Non-cash benefit from any source? **Yes (HUD)**


39 You will also need to update the "Total Monthly Income" question.

		12/01/2012		VA S (HUI
		12/01/2012		VA M (HUI
		12/01/2012		Uner
		12/01/2012		TAN


Add


View Gross Income

Showing 1-4

Total Monthly Income  G

NON-CASH BENEFITS (required question)

Non-cash benefit from any source?  Yes (HUD) G

 Non-Cash Benefits (No Dollar Amount Required)

	Source of Non-Cash Benefit	Start Date *	End Date
		Other Source (HUD)	12/01/2012

40 Click the income "HUD Verification" button.

You will then need to end the previous income for **the day prior** to the new income starting.

AD OF HOUSEHOLD STOP DATA ENTRY HERE

▼ G

HUD Verification ✓

End Date	Source of Income	Monthly Amount
	Worker's Compensation (HUD)	
	VA Service Connected Disability Compensation (HUD)	
	VA Non-Service Connected Disability Pension (HUD)	
	Unemployment Insurance (HUD)	
	TANF (HUD)	

Showing 1-5 of 15

First Previous Next Last

41 Select the income source that you want to update or that is no longer accurate- click the pencil icon.

12/01/2012

HUD Verification: Monthly Income for 05/01/2013

Per Source of Income, the current records for Monthly Income as of 05/01/2013 are displayed. Income not overlapping as of this date are not displayed. In the event that multiple records exist, records containing "Yes" values will be displayed and take precedence for

Source of Income	Do you	
	Yes	No
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input type="radio"/>
SSI (HUD)	<input type="radio"/>	<input type="radio"/>
TANF (HUD)	<input type="radio"/>	<input type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input type="radio"/>

42

In the box that pops-up, end the current answer for **the day prior** to when the new income starts.

Edit Recordset - (23) Smith, John Jo

Monthly Income

If Other, Please Specify

Start Date * 12 / 01 / 2012

End Date / /

Source of Income Earned Income (HUD)

Monthly Amount

Do you receive ANY income? No

Print Recordset Save Cancel

43

Leave the **"Do you receive ANY income?"** question **alone**. Do *not* **overwrite the answer**.

Click "Save" when finished.

Edit Recordset - (23) Smith, John Jo

Monthly Income

If Other, Please Specify

Start Date * 12 / 01 / 2012

End Date 04 / 30 / 2013

Source of Income Earned Income (HUD)

Monthly Amount

Do you receive ANY income? No

Print Recordset Save Cancel

-Select-
Yes
No
Data Not Collected

44

If they went from not getting the income source to then getting it- **now you should be prompted to update the radio button for the income source.**

records containing "Yes" values will be displayed and take precedence for reporting purposes.

Select the Do you receive ANY income? value for all incomplete Source of Income records

☐ No
☐ Data Not Collected
☒ Incomplete

Source of Income	Do you receive ANY income?			
	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pension or retirement income from another job (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Private Disability Insurance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Retirement Income From Social Security (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSDI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
SSI (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

45

After ending the current income, you should get a **fresh income pop-up box** for the answer you are updating.

Update the "Monthly Amount" question.

Monthly Income

If Other, Please Specify

Start Date * 05 / 01 / 2013

End Date

Source of Income Earned Income (HUD)

Monthly Amount

Do you receive ANY income? Yes

Save Cancel

Source of Income	Yes	No	Data Not Collected	Incomplete
Alimony or Other Spousal Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (HUD)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

46 Click "Save" when finished and then "Exit".

If Other, Please Specify

Start Date * 05 / 01 / 2013

End Date

Source of Income Earned Income (HUD)

Monthly Amount 1000.00

Do you receive ANY income? Yes

Save Cancel

Source of Income	Yes	No
Spousal Support (HUD)	<input type="radio"/>	<input type="radio"/>
Child Support (HUD)	<input type="radio"/>	<input type="radio"/>
Earned Income (HUD)	<input checked="" type="radio"/>	<input type="radio"/>
General Assistance (HUD)	<input type="radio"/>	<input type="radio"/>
Unemployment Insurance (HUD)	<input type="radio"/>	<input type="radio"/>
Retirement or pension income from another job (HUD)	<input type="radio"/>	<input type="radio"/>
State Disability Insurance (HUD)	<input type="radio"/>	<input type="radio"/>

47 You can also click on the **magnifying glass icon** next to "Monthly Income" to see a history of the client's monthly income to date.

HIV/AIDS (HUD) No (HUD)

Add

SECTION 2: IF CLIENT IS A MINOR WHO IS NOT HEAD OF HOUSEHOLD STOP DATA ENTRY

INCOME INFORMATION (required information)

Income from Any Source? Yes (HUD)

Monthly Income

Start Date * End Date

Show All Monthly Income Records

Start Date *	End Date
--------------	----------

48 It will tell the story of the client's income.

Start Date * End Date Source of Income Monthly Amount

Show All Monthly Income Records

Monthly Income

Provider	Date Effective	Start Date	End Date	Source of Income	Monthly Amount
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	05/01/2013 8:00:00 AM	05/01/2013		Earned Income (HUD)	US\$1,000.00
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		Worker's Compensation (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		VA Service Connected Disability Compensation (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		VA Non-Service Connected Disability Pension (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		Unemployment Insurance (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		TANF (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		SSDI (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		SSI (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		Retirement Income From Social Security (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		Pension or retirement income from another job (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		Private Disability Insurance (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		Other (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		General Assistance (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012	04/30/2013	Earned Income (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		Alimony or Other Spousal Support (HUD)	
Kentucky Housing Corporation - Dummy Project Eligibility (2234)	12/01/2012 8:00:00 AM	12/01/2012		Child Support (HUD)	

Add Showing 1-16 of 16

First Previous Next

HUD Verifi

Receiving Benefit?

No

No

No

No

No

First Previous Next

train/subway station/airport or anywhere outside)

Who Enters a Housing Move-In Date?

49 Permanent Supportive Housing (PSH) and Rapid Rehousing (RRH) Projects

- Enter the client into projects after they have been referred (through Coordinated Entry) and you begin working with them to find housing.
- Housing Move-In Dates should be entered when the client physically moves into housing-through Interims.

50 Who Enters a Housing Move-In Date?

Do Not Enter For:

- Any Homeless Prevention (HP), Emergency Shelter (ES), Transitional Housing (TH), and Supportive Services clients

Enter Housing Move-In Date For:

- All Rapid Re-Housing (RRH) project clients
- PSH projects only if paying financial assistance

51 Housing Move-In Date - Examples:

Unit Transfers:

- If the client is moving from one housing unit to another with the same landlord while in your Project but does NOT become homeless again in between- then you do not need to enter a new Housing Move-In Date. No need to exit client and create new project start and record a new housing move in date, since the client did not become homeless again and subsidy was not interrupted with a break in between. The HMIS user would complete an Interim Update in the system to update any changes in income, non-cash benefit, health insurance, disability as well as update the unit address information.
- If the client is moving from one housing unit to another with a new landlord but does NOT become homeless again in between- no new housing move in date is required here since the client did not become homeless in between this unit transfer, but just switched units. No need to exit client and create new project start. The HMIS user would complete an Interim Update in the system to update any changes in income, non-cash benefit, health insurance, disability as well as update the unit address information.

Evicted/Vacating unit but remains in Project:

- The landlord evicts the Client; however, the client is still eligible for your program. Client and program staff work together to locate a new housing unit, but time runs out and the client is forced to stay in a homeless shelter for a few nights. Client should be Exited from the project, with an appropriate Destination. And then re-entered into the project the following day, while the search for housing resumes. Once housing is located and the client leaves the shelter and moves into the new unit then a new housing move in date should be entered. The client's new housing move in date should be recorded, and the Prior Living Situation questions should be updated appropriately to reflect the stay in the Emergency Shelter.

Transfer from one PH/RRH to another:

- If the client is moving from one PSH/RRH Project to another but does NOT experience homelessness in between- in this case, the new Project will enter the client into their project (Project Start Date) and enter the Housing move in date, on the same day. At which time, the initial 'starter' project would exit the client.
- If the client is already housed, but they are presenting for some type of prevention assistance and are in need of rental arrears, utility arrears etc. The program would enter the client into HMIS, record the Project Start date, and the housing move in date would be the same as the Project Start date (even though the client was previously housed in the unit). A housing move in date cannot be 'before' a Project Start date. This type of assistance would typically occur in a HOME TBRA, HOPWA Prevention or some other project that provides one time assistance. *(It is important to check with the funding source's eligibility criteria for this type of assistance to ensure the client(s) are eligible for assistance).*

52 First, search for your client.

Alias

Social Security Number

Social Security Number Data Quality

U.S. Military Veteran?

Exact Match

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

ID	Name	Social Security Num
21	Smith, Jean Mary, Mrs.	403-87-6300
23	Smith, John Jo	123-45-6789
20	Smith, John Paul, Mr	402-87-8600

53 If person moved in on a previous date, use Back Date to "Set New Back Date" to the day the client(s) physically moved-in to housing.

Man (Boy, if child)

Information

Entry/Exits

Back Date Mode

The current System Date is set to:

02/13/2024 1:12:00 PM

If you would like to use a different date, please select one below:

Back Date 10 / 14 / 2013 8 : 00 : 00 AM

Set New Back Date Use Current System Date

Referrals

Referred To Provider

Case Managers

Add Case

54 Select the "Entry / Exit" tab for the Head of Household (HOH).

Shadow Mode awil

Enter Data As Kent

Back Date Mode 10

Type here for Global Search

Date: 10/14/2013 8:00:00 AM

-Switch to Another Household Member-

Service Transactions

Households	ROI	Entry / Exit	Case Managers	Case Plans	Assessments
------------	-----	--------------	---------------	------------	-------------

33)
frican, or African
/o

Social Security	***-**-6789
U.S. Military Veteran?	No (HUD)

Entry/Exits

Permission	Start Date	End Date	Program	Type	Project Start Date
------------	------------	----------	---------	------	--------------------

55 Select "Interims".

Date: 10/14/2013 8:00:00 AM

-Switch to Another Household Member-

Submit

Service Transactions

ROI	Entry / Exit	Case Managers	Case Plans	Assessments
-----	--------------	---------------	------------	-------------

Reminder: Household members must be established on Households tab before creating Entry / Exits

Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
HUD	12/01/2012	01/01/2014			

Showing 1-1 of 1

Exit

56 Click "Add Interim Review".

The screenshot shows the 'Add Interim Review' modal for Client - (23) Smith, John Jo. The modal is titled 'Interim Reviews' and contains a table of 'Interim Reviews Associated with this Entry / Exit'. The table has two columns: 'Review Date' and 'Review Type'. There is one entry with a review date of 05/01/2013 and a review type of 'Update'. Below the table, there is a green button labeled 'Add Interim Review' and a status 'Showing 1-1 of 1'. The background shows the client profile page with a sidebar on the left containing navigation links like 'Home', 'Clients', 'Resources', 'Shelters', 'Scans', 'Reports', 'Admin', and 'Logout'.

Review Date	Review Type
05/01/2013	Update

[Add Interim Review](#) Showing 1-1 of 1

57 Select/check the household members who moved-in to housing as appropriate.

The screenshot shows the 'Add Interim Review' modal for Client - (23) Smith, John Jo. The modal is titled 'Add Interim Review - (23) Smith, John Jo'. It contains a section for 'Household Members' with a list of members and their entry dates. The first member is '(10) Single w. Dependent Children' with a checkbox. The second member is '(23) Smith, John Jo' with a checked checkbox and an entry date of 12/01/2012 8:00 AM. The third member is '(92) Smith, Sally Sue' with a checked checkbox and an entry date of 12/01/2012 8:00 AM. The fourth member is '(106) Smith, Baby Mae' with a checkbox and an entry date of 07/02/2013 8:00 AM. Below the household members section, there is a section for 'Interim Review Data' with fields for 'Entry / Exit Provider', 'Entry / Exit Type', 'Interim Review Type', and 'Review Date'. The 'Review Date' field is set to 10 / 14 / 2013. The background shows the client profile page with a sidebar on the left containing navigation links like 'Home', 'Clients', 'Resources', 'Shelters', 'Scans', 'Reports', 'Admin', and 'Logout'.

Household Members

To include Household members associated with the Entry / Exit for this Interim Review, click the checkbox next to the member name.

- ☐ (10) Single w. Dependent Children
- ☒ (23) Smith, John Jo (Entry Date: 12/01/2012 8:00 AM)
- ☒ (92) Smith, Sally Sue (Entry Date: 12/01/2012 8:00 AM)
- ☐ (106) Smith, Baby Mae (Entry Date: 07/02/2013 8:00 AM)

Interim Review Data

Entry / Exit Provider	Kentucky Housing Corporation - Dummy Project Eligibility (22
Entry / Exit Type	HUD
Interim Review Type *	-Select-
Review Date *	10 / 14 / 2013 8 : 00 : 00 AM

58

Use "Update" as the Interim type, unless it is during the appropriate "Annual Assessment" timeframe.

Clients > Client Profile

Client - (23) Smith, John Jo

(23) Smith, John Jo

Release of Information: Ends 07/02/2014

Client Information

Summary Client P

Entry / Exit

Program

Kentucky Housing Corporation - Dum

Add Entry / Exit

To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name.

☒ (10) Single w. Dependent Children

☒ (23) Smith, John Jo (Entry Date: 12/01/2012 8:00 AM)

☒ (92) Smith, Sally Sue (Entry Date: 12/01/2012 8:00 AM)

☒ (106) Smith, Baby Mae (Entry Date: 07/02/2013 8:00 AM)

Interim Review Data

Entry / Exit Provider	Kentucky Housing Corporation - Dummy Project Eligibility (2234)
Entry / Exit Type	HUD
Interim Review Type *	-Select-
Review Date *	10 / 14 / 2013 8 : 00 : 00 AM

Save & Continue Cancel

-Select-
Annual Assessment
Update

Exit

59

Click "Save & Continue".

92) Smith, Sally Sue (Entry Date: 12/01/2012 8:00 AM)

106) Smith, Baby Mae (Entry Date: 07/02/2013 8:00 AM)

Review Data

Entry / Exit Provider	Kentucky Housing Corporation - Dummy Project Eligibility (2234)
Entry / Exit Type	HUD
Interim Review Type *	Update
Review Date *	10 / 14 / 2013 8 : 00 : 00 AM

Save & Continue Cancel

Exit

Date: 10/14/2013 8:00:00 AM

-Switch to Another Household Member-

Case Plans Assessm

Exits

Date	Exit Date	Interims
	01/01/2014	

60

Complete the Housing Move-In Date for the date the client physically moved into housing, as well as all other housing information.

Household Members

(23) Smith, John Jo
Age: 33
Veteran: No (HUD)

(92) Smith, Sally Sue
Age: 32
Veteran: No (HUD)

(106) Smith, Baby Mae
Age: 0
Veteran: No (HUD)

BOS- HUD CoC & ESG RRH Update (FY2024)

Interim Revi

SECTION 1: ANSWER FOR ALL CLIENTS

Relationship to Head of Household *

Self (head of household)

Housing Move-in Date

10 / 14 / 2013

Based on the housing move-in date above, what county was the client housed in?

Warren

Unit Address

Unit City

Unit Zip

Number of bedrooms in unit

Number of people in unit

Date of Birth

01 / 01 / 1980

Date of Birth Type

Full DOB Reported (HUD)

To select multiple values hold down the "ctrl" or "cmd" key and click on each value

61

You will need to utilize the "Household Members" menu on the left to click on each client in the household, and then update their Housing Move-In information.

Last Viewed

Favorites

Home

Clients

Resources

Shelters

Scans

Reports

Admin

Logout

Collapse <<

Clients > Client Profile

Client - (23) Smith, John Jo

(23) Smith, John Jo

Release of Information: Ends 07/

Client Information

Summary

Entry / Exit

Program

Kentucky Housing Corpora

Add Entry / Exit

Entry / Exit Provider

Kentucky Housing Corporation - Dummy Project Eli

Entry / Exit Type

HUD

Interim Review Type

Update

Review Date

10/14/2013 08:00:00 AM

Interim Review Assessment

Household Members

(23) Smith, John Jo
Age: 33
Veteran: No (HUD)

(92) Smith, Sally Sue
Age: 32
Veteran: No (HUD)

(106) Smith, Baby Mae
Age: 0
Veteran: No (HUD)

BOS- HUD CoC & ESG RRH Update (FY2024)

SECTION 1: ANSWER FOR ALL CLIENTS

Relationship to Head of Household *

Self (head of household)

Housing Move-in Date

10 / 14 / 2013

Based on the housing move-in date above, what county was the client housed in?

Warren

Unit Address

1234 Brown Street

Unit City

Bowling Green

Unit Zip














42101




Number of bedrooms in unit

2

62 Click "Save & Exit" when finished.

CLIENT LIVING HISTORY (in the last 2 years)

In the last 2 years, in what Kentucky county did you become homeless?	-Select-  
If you have lived in multiple Kentucky counties in the last 2 years, please select additional county:	-Select-  
If you have lived in another part of the US in the last 2 years, please specify state:	-Select-  
If other location in the last 2 years, please specify:	<input type="text"/> 
In what Kentucky county are you currently staying?	-Select-  
Did you have housing when you came to this county/community?	-Select-  
What is the primary reason you came to this county/community?	-Select-  

Exiting a Client



Alert!

Before creating an Exit for your client, ensure that all Service Transactions, Measurements, and Case Plans are completed and closed.

End Case Manager relationship by adding an End Date.

63







Go to the "Entry/Exit" tab within the Client Record, then click the pencil to the left of the "Exit Date".

-Switch to Another Household Member- ▼ Submit

Service Transactions

ROI **Entry / Exit** Case Managers Case Plans Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
HUD	 12/01/2012				 

Showing 1-1 of 1

Exit

64

Select all household members to be Exited (in most cases it's all).

ellSky | Community Services

ServicePoint Training Site

Kentucky Housing Corporation - BOS

February 13, 2024

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s

Clients > Client Profile

Client - (23) Smith, John Jo

(23) Smith, John Jo

Release of Information: **Expired**


Client Information

Summary

Entry / Exit

Edit Exit Data - (23) Smith, John Jo

Household Members




 To update Household member

☐ (10) Single w. Dependent Children

☐ (92) Smith, Sally Sue

☐ (106) Smith, Baby Mae

Edit Exit Data - (23) Smith, John Jo

Exit Date *	02 / 13 / 2024	   2 : 46
Reason for Leaving	-Select-	
If "Other", Specify		
Destination *	-Select-	

65 Complete all fields as necessary.

Click "Save & Continue".

The screenshot shows a web form titled "0) Single w. Dependent Children". It contains several input fields and dropdown menus. A modal window is open over the form, with the "Save & Continue" button highlighted by an orange circle. The background form includes fields for "Exit Date", "Reason for Leaving", "Other", "Destination", and "Other", "Specify". The "Destination" dropdown is currently set to "Hotel or motel paid for without emergency shelter voucher (HUD)". The "Save & Continue" button is located at the bottom right of the modal window.



Alert!

Never use "Safe Haven" for "Destination", because we do not have these type of Projects within the BOS. Instead select "Emergency Shelter".

66

If the "Destination" the client exits to is "Rental by client, with ongoing housing subsidy (HUD)", then a dependent drop-down question will show up, asking you to select the "Rental Subsidy Type".

The "Subsidy Type" **must** be filled in if this option is chosen.

Client Information

Summary

Entry / Exit

Program

Kentucky Housing Corpora

Add Entry / Exit

Collapse <<

(106) Smith, Baby Mae

Edit Exit Data - (23) Smith, John Jo

Exit Date * 01 / 01 / 2014 2 : 46 : 32 PM

Reason for Leaving Disagreement with rules/persons

If "Other", Specify

Destination * Rental by client, with ongoing housing subsidy (HUD)

If "Other", Specify

Rental Subsidy Type -Select-

Notes

-Select-

GPD TIP housing subsidy

VASH housing subsidy

RRH or equivalent subsidy

HCV voucher (tenant or project based) (not dedicated)

Public housing unit

Rental by client, with other ongoing housing subsidy

Housing Stability Voucher

Family Unification Program Voucher (FUP)

Foster Youth to Independence Initiative (FYI)

67

Complete Exit Assessment information for all clients in the household.

Green check marks will appear when each client is saved.

Add

Showing 1-5 of 10

First Previous Next Last

Disabilities (Please List Drug and Alcohol Disabilities Separately. DO NOT USE THE "BOTH DRUG AND ALCOHOL ABUSE" choice.) HUD Verification ✓

Disability Type	Disability determination	Start Date *
Physical (HUD)	No (HUD)	12/01/2012
Mental Health Disorder (HUD)	No (HUD)	12/01/2012
Developmental (HUD)	No (HUD)	12/01/2012
Drug Use Disorder (HUD)	No (HUD)	12/01/2012
HIV/AIDS (HUD)	No (HUD)	12/01/2012

Add

Showing 1-5 of 8

First Previous Next Last

Current school enrollment and attendance -Select-

Save Save & Exit Exit

-Select-

68 Click "Save & Exit" when finished.

12/01/2012	State Health Insurance for Adults	No			
12/01/2012	Employer - Provided Health Insurance	No			

Add Showing 1-5 of 10 First Previous Next Last

Disabilities (Please List Drug and Alcohol Disabilities Separately. DO NOT USE THE "BOTH DRUG AND ALCOHOL ABUSE" choice.) HUD Verification ☒

Disability Type	Disability determination	Start Date *
Physical (HUD)	No (HUD)	12/01/2012
Mental Health Disorder (HUD)	No (HUD)	12/01/2012
Developmental (HUD)	No (HUD)	12/01/2012
Drug Use Disorder (HUD)	No (HUD)	12/01/2012
HIV/AIDS (HUD)	No (HUD)	12/01/2012

Add Showing 1-5 of 8 First Previous Next Last

Current school enrollment and attendance Not currently enrolled in any school or educational course ▼ G

Most Recent Educational Status K12: Obtained GED ▼ G

Save Save & Exit Exit

69 Data Collection Steps:

Record Creation:

- When the client record is created in HMIS

Project Start:

- When the client enrolls in the Project

Interim Update:

- When the client reports a change*

Interim Annual Assessment:

- Recorded within 30 calendar days before or after the anniversary of the Project Start Date

Project Exit:

- When the client exits the project

*All Permanent Housing Projects (PSH) must record Move-In Dates as an Interim Update