Permanent Supportive Housing HMIS Checklist

Note: All Services, Case Notes and Assessments should be completed within the Program Enrollment and NOT at the Profile level for the Client.

1. Process Referral (prior to a face-to-face meeting)

- ☐ Referrals will be sent directly from the **Your Way Home program manager** including client names, contacts for other support workers, and Clarity Unique IDs.

2. Enrollment (for all clients who will be sleeping in a bed at the PSH project)

- ☐ Verify and update the **Profile** screen of all household members
  - On right side of Client Profile, ensure all household members should be enrolled in Rapid-Rehousing program
  - Click on "Manage" to update household composition and remove any member who will not be enrolled
    - Click "Edit" next to household members who need to be removed
    - Toggle "Exited Household"
    - Add correct date. If unknown, enter Program Enrollment date

- ☐ Complete **Permanent Supportive Housing** program enrollment
  - Under *Include group members,* toggle each household member.
  - If a household was enrolled in any other program less than 90 days ago, enrollment data will automatically populate when creating an your program enrollment
    - Work with the client to ensure enrollment data is accurate
  - Project Start Date = date of initial engagement
  - **Note**: leave **Housing Move In** date blank until a household has secured permanent housing and signed a lease. You will add this later.
  - Relationship to Head of Household = select for each household member
  - Prior Living Situation = client provides this information directly; determines chronic homelessness status
  - Disabling Conditions and Barriers = selecting "Yes" for any Condition means "Yes" needs to be selected for "Disabling Condition" field
    - Domestic Violence Victim/Survivor = if "Yes" ensure profile is de-identified (see Your Way Home Operations Manual)
  - Monthly Income and Sources = enter all sources of formal and informal Income amounts
  - Receiving Non-Cash Benefits = Non-Cash Benefits means regular, recurrent benefits; see sources for "Other Non-Cash Benefits"
  - Covered by Health Insurance = if "Yes", make correct selection
    - Frequently selected options
      - Medicaid = federal and state insurance for income-limited households

        - Medicare = federal insurance for adults ages 65+ or under 65 and have a disability, no matter your income
        - State Health Insurance for Adults = Affordable Care Act marketplace
    - Well Being and General Health Status= Discuss directly with client; be aware that some discussions might be triggering for new intakes

- [ ] Add the appropriate **Services** based on what is provided to the household
    - Click Programs; Open Program "Permanent Supportive Housing"
    - In Program Enrollment, click on "Provide Services"
    - To expand list, select down arrow on right
    - Select the appropriate Service, fill in appropriate fields & click "Add Service"
    - Service Start Dates should be the same date as the Project Start Date
    - Services must include, at minimum, case management and any other services as indicated in the Operations Manual

3. Records Management (while client is a project participant)

- [ ] Add case notes to Program Enrollment
    - Case notes should be added after each interaction with a client and outline what was happened during the meeting
    - Remember: Other providers have access to your notes and can see the content of them, unless they're marked "Private"
        - Notes should be marked private if they are meant for internal agency use only
    - Click Programs; Open Program "Permanent Supportive Housing"
    - Click on "Notes" from the Program Enrollment
    - Click "ADD NOTE" on the right side of the screen
    - Title= Short summary of meeting content
    - Category = choose the most appropriate category
    - **Note**: data cannot be pulled form notes for future use or analysis. They are only for informational purposes.

- [ ] **Annual Assessments** should be completed within 30 days before or after a client has been enrolled in a program for ONE YEAR
    - Click Programs; Open Program "Permanent Supportive Housing"
    - Click on "Assessment" from Program Enrollment
    - Find Annual Assessment at the bottom of the list and click "START"
    - Toggle each Household Member and click "Add Annual Assessment"
    - Update the information on the Assessment as thoroughly as possible
    - **Note**: these data elements are the same as Program Enrollment
        - See Enrollment instructions above for more information
    - Click "Save & Next" to complete the second assessment
    - Complete Annual Assessments for each household member
    - Click "Save & Close" when done

- **Note**: Clients must be actively enrolled in a program in order to add an Annual Assessment
  - Re-open clients if assessments need to be added after clients are discharged

4. Move-In, Monthly Rent, Utilities, and Other Payments

- Add **Housing Move-In Date** data element once household has moved into permanent housing
  - Click Programs; Open Program "Permanent Supportive Housing"
  - Click on "Enrollment" from Program Enrollment
  - Add "Housing Move In Date"
  - Housing Move In Date = the day the household begins sleeping at their new home

- Add payment related **Services** (like rental payments):
  - Expense Amount, Expense Date and Funding Source is needed
  - Add payment related services monthly or as funding is distributed
  - Add additional **Services** as appropriate for any furniture or other items purchased for move-in
  - For monthly rent and utility payments, add a **Rental Assistance** or **Utility Payment** service each time a payment is made on behalf of the client (do not include client portion)

4. Project Exit

- Exit from **Permanent Supportive Housing** program when appropriate:
  - The household is able to maintain the rent in their current home independently or using other government subsidies
  - The household has relocated to another more supportive environment
  - The head of household is deceased
  - To Exit from a program-
    - From Client Profile click "Programs"
    - Open Program "Permanent Supportive Housing"
    - Click "**Exit"** on the top right of the page.
    - Update the information on the Exit page as thoroughly as possible
    - **Note**: these data elements are the same as Program Enrollment
    - Exit Destinations= Where the household is going now
    - "Staying with Friends/Family- Permanent Tenure"= staying somewhere longer than 7 days
    - Do not answer **"Data Not Collected**." If unable to follow up with a client, select "**No Exit Interview Completed**" instead
  - Modify the end date for all open services (listed at the bottom of Exit screen)