

Street Outreach 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.

Processing Referral (prior to a face-to-face meeting)

- Add notes in Referral
- Copy notes into Notes tab
 - Note important household details-
 - Family Members with Physical Descriptions
 - Location
 - Medical Conditions to be aware of
- Connect with client to verify homeless status face-to-face.
 - If possible, homeless status should be verified where the client is sleeping
 - Verification = visual confirmation of homelessness
 - Visit to encampment/tent
 - Belongings in vehicle
 - Carrying belongings
 - Physically disheveled appearance

If client is literally homeless (can verify with face-to-face contact):

- All clients should also be enrolled in **PA-504 Coordinated Entry**
- Complete **Street Outreach** 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
 - 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

- Add **Current Living Situation** anytime direct contact is made with the client
 - To add Current Living Situation (from Client Profile):
 - Click Programs; Open Program “Street Outreach”
 - Click on “Current Living Situation”
 - **Note:** Current Living Situations should be collected for both PA-504 Coordinated Entry and Street Outreach programs

- Add case notes in **Notes** tab
 - Case notes should be added after each interaction with a client and outline what 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 on “Notes” from the Client Profile
 - Select “Add New Note” on the top right
 - Title= Short summary of meeting content
 - Category = choose the most appropriate category
 - **Note:** data cannot be pulled from notes for future use or analysis. They are only for informational purposes.

- Add the appropriate **Services** depending on the outcome of the contact
 - To add a Services (from Client Profile)
 - Click Programs; Open Program “Street Outreach”
 - In Program Enrollment, click on “Provide Services”
 - To expand list, select down arrow on right
 - Select the appropriate Service, answer all questions & click “Add Service”

- Exit from **Street Outreach** program when appropriate-
 - To **Exit** from a program-
 - Click Programs; Open Program “**Street Outreach**”
 - Click “**Exit**” on the top right of the page.
 - Update the information on the Exit page as thoroughly as possible
 - Note: this is the same as 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
- **Note:** Households should remain enrolled in **PA-504 Coordinated Entry** program upon street outreach exit unless a housing solution has been identified

Client is Not Literally Homeless (cannot verify via face-to-face contact):

- **Reject Referral** if no face-to-face contact is made
- If face-to-face contact is made but cannot verify literal homeless status, enroll into **Street Outreach program** and complete Enrollment screen
 - 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
 - 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
- Add **Current Living Situation** anytime direct contact is made with the client
 - To add Current Living Situation (from Client Profile):

- Click Programs; Open Program “Street Outreach”
 - Click on “Current Living Situation”
 - **Note:** Current Living Situations should be collected for both PA-504 Coordinated Entry and Street Outreach programs
- Add case note(s) in **Notes** tab stating why the referral is being denied
 - Remember: Other providers have access to your notes and can see the content of them.
 - Click on “Notes” from the Client Profile
 - Select “Add New Note” on the top right
 - Title= Short summary of meeting content
 - Category = choose the most appropriate category
- Add the appropriate **Services** depending on the outcome of the contact
 - To add a Services (from Client Profile)
 - Click Programs; Open Program “Street Outreach”
 - In Program Enrollment, click on “Provide Services”
 - To expand list, select down arrow on right
 - Select the appropriate Service, answer all questions & click “Add Service”
- **Exit** from Street Outreach program by completing Exit screen
 - Click Programs; Open Program “**Street Outreach**”
 - Click “**Exit**” on the top right of the page.
 - Update the information on the Exit page as thoroughly as possible
 - Note: this is the same as 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

If the client is staying in a hotel paid for by Street Outreach:

- After completing enrollment into the **Street Outreach** and the **PA-504 Coordinated Entry** program, **enroll** into **Hotel Overflow Program** and complete Enrollment screen.
 - 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
 - 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
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 - State Health Insurance for Adults = Affordable Care Act marketplace
- Follow **HMIS Checklist for Emergency Shelter**