



Street Outreach Handbook

This handbook provides instruction on how to enroll, exit and transact services for participants receiving street outreach services in Multnomah County.

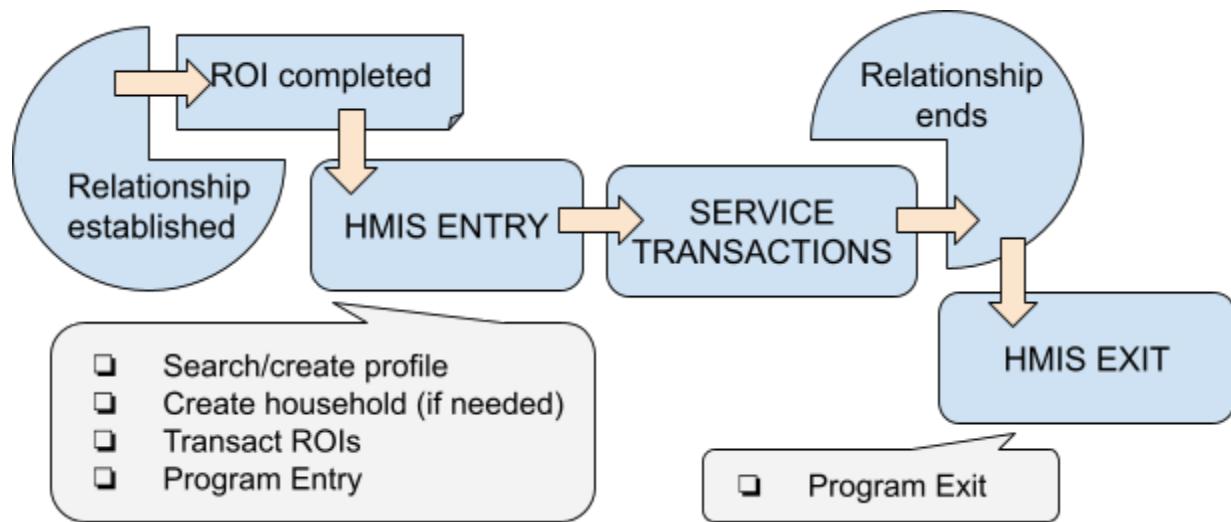
If you are new to HMIS and need training on these steps, please contact hmishelp@multco.us for further support.

Table of Contents

Data Milestones	2
1. Participant Search / Add Participant	2
2. ROIs	4
3. Program Entry	5
4. Service Transactions	7
5. Program Exit	8

Data Milestones

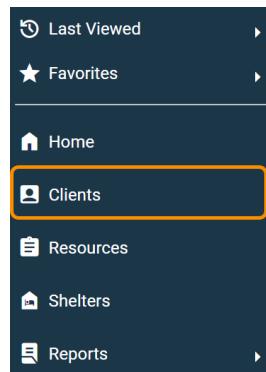
Below is a figure that represents the HMIS data entry, update and exit flow as it relates to the client-program relationship for street outreach programming.



1. Participant Search / Add Participant

- Always check to see if a participant profile already exists before creating a new profile in HMIS. This step reduces the risk of creating duplicate profiles.
- Search for an existing client record by entering the first three characters of both the first and last name.
- If the participant has multiple last names, search them under each of the last names provided. Search using an alias if available.
- In the event you find multiple Client IDs# for a participant, please email them to hmishelp@multco.us.

Step 1: Click **Clients** from the left hand navigation pane on the Main Menu.



Step 2: Search participants by entering the first three digits of both First Name and Last Name. Then, click Search.

- Alternatively, you can search by the Client ID, if you know it. Enter the Client ID. Then, click “Submit”.

Clients > Client Search

Client Search

Please Search the System before adding a New Client.

Name	First	Middle	Last
Name Data Quality	-Select-		

Exact Match

Search Clear Add New Client With This Information

Client Number

Enter or scan a Client ID number to go directly to that Client's profile.

Client ID # Submit

Step 3: Click on either the participant name or pencil to open the profile.

The **Client Results** section displays the participants that match the search criteria. If you don't find the client you're looking for, follow the instructions below to create a new Client Profile.

Client Results

ID	Name	Social Security Number	Date of Birth
1	Case, Justin A.	-9846	09/01/1975

Step 4: If the search returns no matches, click “Add New Client With This Information”.

Clients > Client Search

Type here for Global Search

Client Search

Please Search the System before adding a New Client.

Name	First	Middle	Last	Suffix
------	-------	--------	------	--------

Search ALL Clients

Search Clear Add New Client With This Information

Step 5: Once you have added a new participant with this Information - a pop up will appear - just confirm and click “OK”.

Add New Client Information

You are about to add a New Client to the system (Be sure to look through all the possible matches before continuing this process). Continue with Add New Client?

Ok Cancel

Step 6: Click “Client Profile” to continue adding participant information, then click the pencil to edit the Client Record.

Ensure all data elements have been added - First/Last Name, SSN Data Quality and Veteran Status.

Click “Save”.

Then, click the pencil to edit the Client Demographics.

Click “Save”.

The screenshot shows the 'Client Profile' screen. At the top, it displays 'Client - (1) Case, Justin A' and the release of information period. Below this is the 'Client Information' section with tabs for 'Summary', 'Client Profile' (which is selected and highlighted with an orange arrow), 'Households', 'ROI', and 'Entry'. The 'Client Profile' tab contains a sub-section for 'Client Record' with fields for Name, Name Data Quality, Alias, Social Security, SSN Data Quality, U.S. Military Veteran?, Sex, Age, and Date of Birth. An edit icon (pencil) is located next to the Age field. Below this is the 'Client Demographics' section with a date of birth of 09/09/1990. To the right, a zoomed-in view shows the 'Client Record' edit screen with fields for Name (Justin), Name Data Quality (Full Name Reported), Alias (All entry exits will be deleted), and Social Security (9846). A warning message at the top of this zoomed-in view reads: '⚠️ Editing the Client Record Information'.

2. ROIs

Transact two ROIs, one for the login provider (the agency) and one for the street outreach provider.

Step 1. In order to transact ROIs in the system, the SO worker must complete a verbal Release of Information form with each adult in the household. At the point of data entry, the HMIS user must transact two ROIs; one for your agency's parent provider (the default selection) and one for the Street Outreach program. This must be done for all household members.

Step 2. Click the ROI tab in the Client Profile.

The screenshot shows the 'Client Profile' screen with the 'Client Information' section at the top. Below it are tabs for 'Summary', 'Client Profile' (selected), 'ROI' (highlighted with an orange arrow), 'Households', 'Entry / Exit', and 'Case'. A timestamp 'Added to the system 08/20/2025 02:44 PM' is visible at the bottom of the screen.

Step 3: Check all household members who are covered by verbal ROIs.

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.

(230) Female Single Parent
 (477) Mouse, Donald
 (468) Mouse, Minnie
 (478) Mouse, Sally

Step 4: Select both the parent provider (also known as your login provider) AND the street outreach program.

Both ROIs should last for 7 years. The ROI start date should always equal the street outreach Entry Date (for the entry where you'll enter the assessment data).

The ROI Start Date cannot be after the Entry Date. The Entry Date should be the date the participant did the intake.

If using the Verbal Release of Information document, select "Verbal Consent".

Click "Save Release of Information".

3. Program Entry

Do this step only if an entry for your Street Outreach program hasn't already been

created.

Client Information

Service Transactions

Entry / Exit

Step 1: In the client's record, click the Entry/Exit tab. Click "Add Entry/Exit".

Entry / Exit

Program	Type
Coordinated Housing Access (CoC) CE Clackamas (4433)	HUD

Add Entry / Exit

Step 2: Select the correct Street Outreach provider, by clicking Search in the provider field and clicking the grey “+” next to the correct provider.

Project Start Data - (1433793) Case, Sample

Provider *	Cascadia - Street Outreach Team - ISEP Retention Services (6418)	Search
Type *	-Select-	
Project Start Date *	12 / 15 / 2025	

Provider Search

Provider Search

Search for Providers by using keywords from the Provider Name or Description.

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N
Provider	Level		Phone											
<input type="button" value="+"/> CAP - Cascadia - OTIH (2819)	Level 5		503-2											
<input type="button" value="+"/> Cascadia - PATH - SO (Street Outreach) (5613)	Level 5		503-2											

Step 3: Select the “Basic” E/E type and select the correct Project Start Date.

The “Project Start Date” (also known as the Entry Date) will be the date the client completed intake paperwork for the street outreach program.

Step 4: Click “Save & Continue.”

Step 5: Enter all entry assessment data. All of these questions should be located on your street outreach intake paperwork.

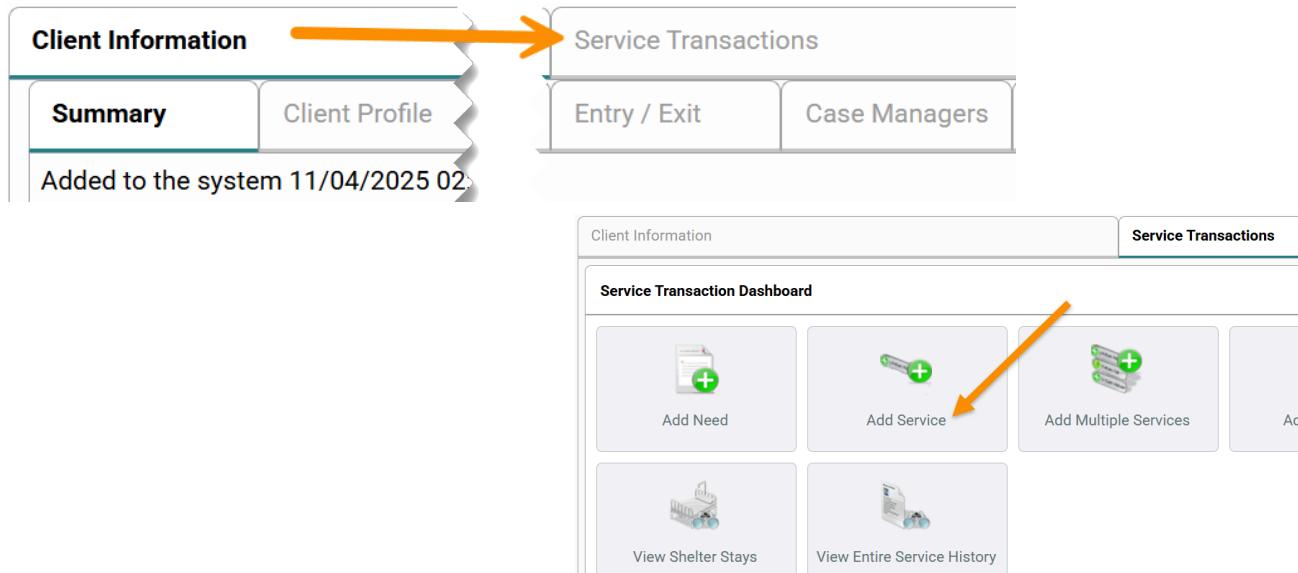
Date of Engagement:

- An important question on the assessment is called Date of Engagement.
- Date of Engagement is defined by HUD as, “The date an interactive client relationship results in a deliberate client assessment or beginning of a case plan.” This is an important milestone in street outreach programs.
- If program staff do not reach this level of interaction with the client before exit, leave Date of Engagement blank.
- When completed, Date of Engagement must always be on or after the Project Start Date and before the Exit Date.
- Only one Date of Engagement is allowed between project start and exit.
- If the Date of Engagement is after the Project Start Date, Date of Engagement should be entered via an interim review.

Step 6: Click “Save & Exit”.

4. Service Transactions

Step 1: In the client's record, click the Service Transactions tab. Click "Add Service".



Client Information

Service Transactions

Summary Client Profile

Entry / Exit Case Managers

Added to the system 11/04/2025 02

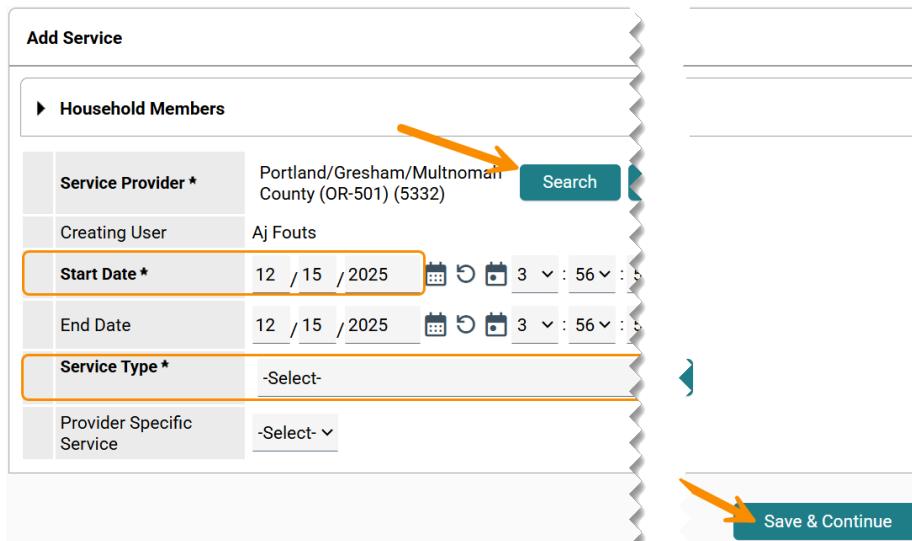
Client Information Service Transactions

Service Transaction Dashboard

- Add Need
- Add Service
- Add Multiple Services
- View Shelter Stays
- View Entire Service History

Step 2: Click Search and select the correct Street Outreach service provider. Edit the service Start Date, End Date and Service Type as needed.

If multiple household members are being served, expand the "Household Members" section and select all members receiving the service.



Add Service

Household Members

Service Provider *	Portland/Gresham/Multnomah County (OR-501) (5332)	Search
Creating User	Aj Fouts	
Start Date *	12 / 15 / 2025	
End Date	12 / 15 / 2025	
Service Type *	-Select-	
Provider Specific Service	-Select-	

Save & Continue

Step 3: Click "Save & Continue". Attaching fund sources to services is not required as part of this workflow. Do not change any other information on the "Edit Service" screen. Leave the answer to "Need Status" as "Identified" toward the bottom of the screen.

Household Members

Apply Funds for Service

Need Information

Need Status *	Identified
Outcome of Need	-Select-
If Need is Not Met, Reason	-Select-

Save

Save & Exit

Exit

Step 4: Scroll to the bottom of the screen. Click “Save & Exit”.

Repeat steps in this section to transact as many services as needed for this client.

5. Program Exit

Exits can be done at any time if street outreach staff proactively learn of a client no longer being eligible or interested in street outreach services. Examples of this include:

- Client leaving the program’s defined service area
- Client moving into permanent housing or emergency shelter
- Client expressing no further interest in receiving services

Clients will often exit the program without notifying street outreach staff. Therefore, on a quarterly basis, data entry staff should exit all street outreach entries for people that have been inactive for three months. A street outreach participant becomes “inactive” when they have not received any services from the street outreach program in three months, as evidenced by a lack of service transactions in HMIS, and staff have made at least three (3) attempts to contact the client. Contact attempts can be tracked within HMIS as case notes or outside of HMIS.

(cont. on next page)

Step 1: In the client's record, click the Entry/Exit tab. Find the Street Outreach provider entry/exit.

Client Information				Service Transactions																									
Summary	Client Profile	Households	ROI	Entry / Exit		Case Managers	Case Plans	Assessments																					
<p><i>Reminder: Household members must be established on Households tab before creating Entry / Exits</i></p>																													
<h3>Entry / Exit</h3> <table border="1"> <thead> <tr> <th>Program</th> <th>Type</th> <th>Project Start Date</th> <th>Exit Date</th> <th>Interims</th> <th>Follow Up</th> <th>Client Count</th> </tr> </thead> <tbody> <tr> <td>Sunstone Way: Imago Dei NbN Shelter (ES) (9516)</td> <td>Basic</td> <td>12/10/2025</td> <td>12/10/2025</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Gresham - Homeless Services Program - SO (7118)</td> <td>Basic</td> <td>12/03/2025</td> <td><input type="text" value=""/></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>									Program	Type	Project Start Date	Exit Date	Interims	Follow Up	Client Count	Sunstone Way: Imago Dei NbN Shelter (ES) (9516)	Basic	12/10/2025	12/10/2025				Gresham - Homeless Services Program - SO (7118)	Basic	12/03/2025	<input type="text" value=""/>			
Program	Type	Project Start Date	Exit Date	Interims	Follow Up	Client Count																							
Sunstone Way: Imago Dei NbN Shelter (ES) (9516)	Basic	12/10/2025	12/10/2025																										
Gresham - Homeless Services Program - SO (7118)	Basic	12/03/2025	<input type="text" value=""/>																										

Step 2: Click the pencil next to the “Exit Date” field.

Step 3: Enter the Exit Destination and Project Exit Date. Click “Save & Continue”.

If this client is getting exited due to inactivity, use today's date as the Exit Date and use “No exit interview completed (HUD) completed” as the Exit Destination.

Edit Exit Data - (1) Case, Justin A	
Exit Date *	12 / 15 / 2025
Reason for Leaving	-Select-
If "Other", Specify	
Destination *	No exit interview completed (HUD)
If "Other", Specify	
Notes	

Step 4: Make any needed updates to the client's exit assessment. Once all updates are complete, scroll to the bottom and click “Save & Exit”.

Entry Assessment		Exit Assessment
<p>Household Members</p> <p>(1) Case, Justin A Age: 50 Veteran: No (HUD)</p>	<p>Household Data Sharing</p> <p>Client: (1) Case, Justin A</p> <p>Add Household Data</p>	<p>Program Exit - [OR-501]</p> <p>Exit Date: 12/15/2025 05:10:09 PM</p>
<p>Verify, and if applicable, Update the following questions for EACH Household Member</p> <p>Relationship to Head of Household: Self (head of household)</p>		
<p>Save Save & Exit Exit</p>		

~ End of doc ~