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.

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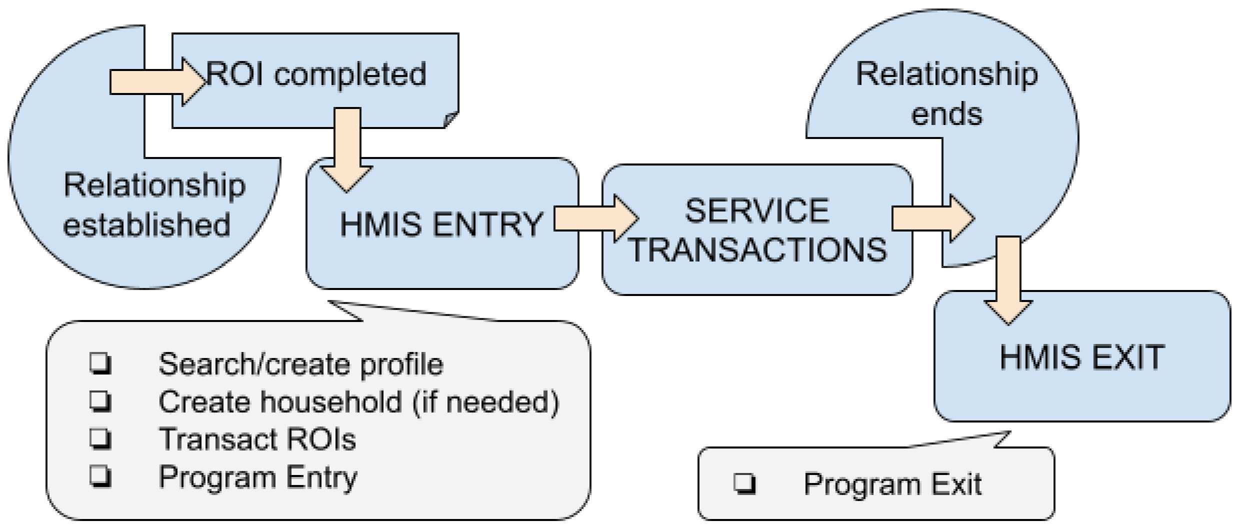
Data Milestones

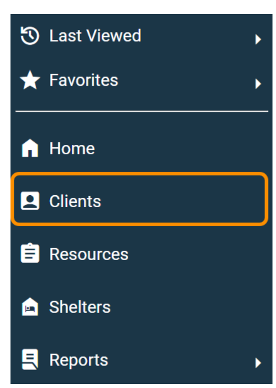
Below is a figure that represents the HMIS data entry, update and exit flow as it relates to the client-program relationship for street outreach programming.



1. Participant Search / Add Participant

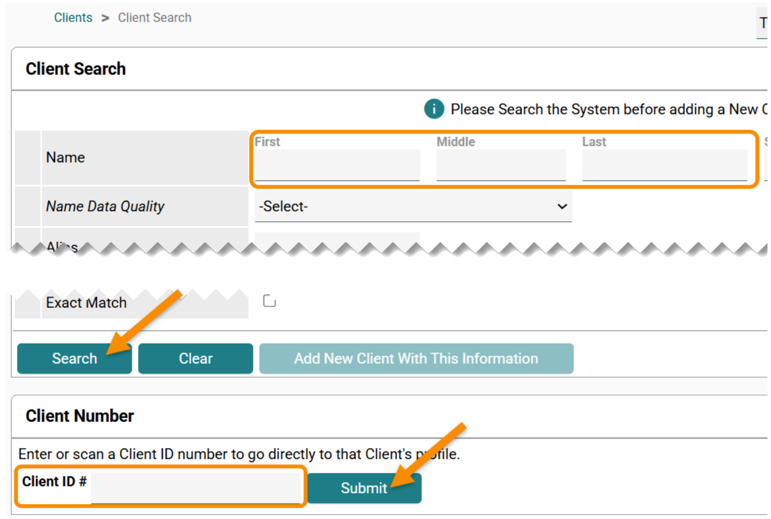
- Always check to see if a participant profile already exists before creating a new profile in HMIS. This step reduces the risk of creating duplicate profiles.
- Search for an existing client record by entering the first three characters of both the first and last name.
- If the participant has multiple 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.

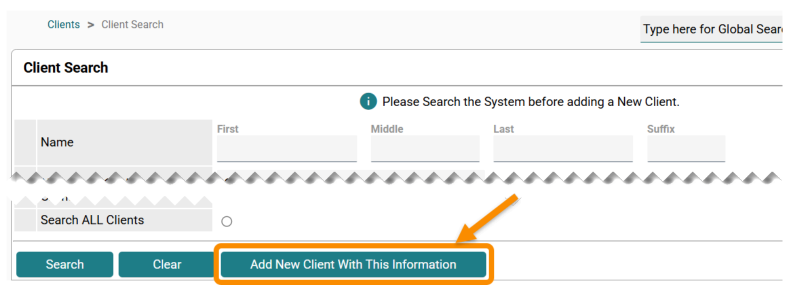
- Alternatively, you can search by the Client ID, if you know it. Enter the Client ID**.** Then, click “Submit”**.**



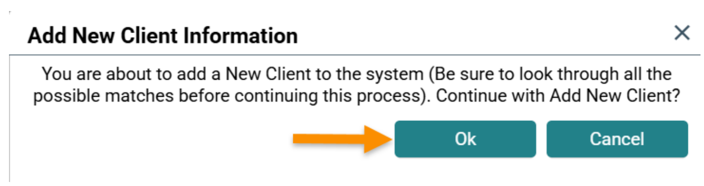
Step 3: Click on either the participant name or pencil to open the profile.

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.

Step 4: If the search returns no matches, click “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”.



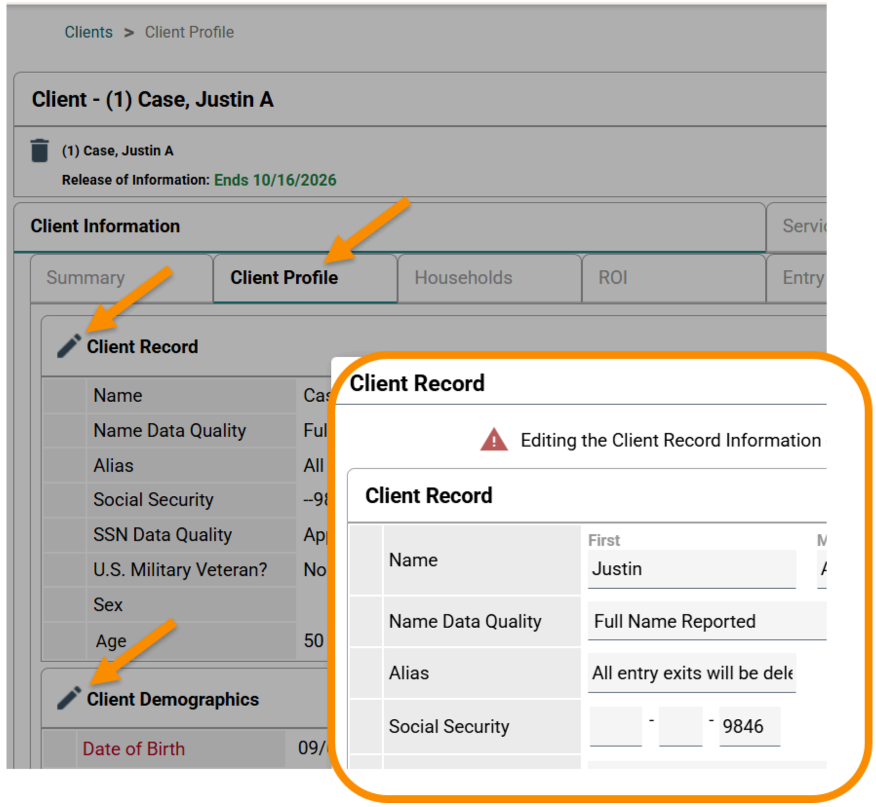
Step 6: Click “Client Profile” to continue adding participant information, then click the pencil to edit the Client Record.

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”.

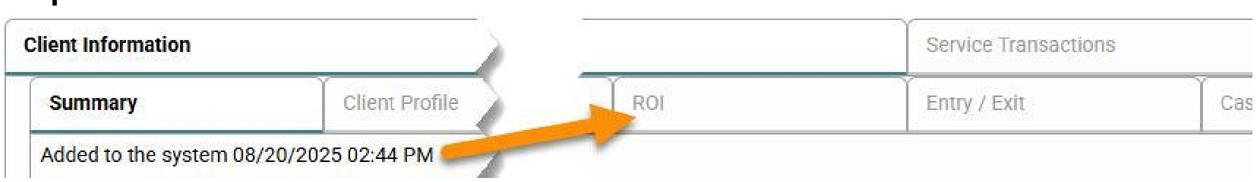


2. ROIs

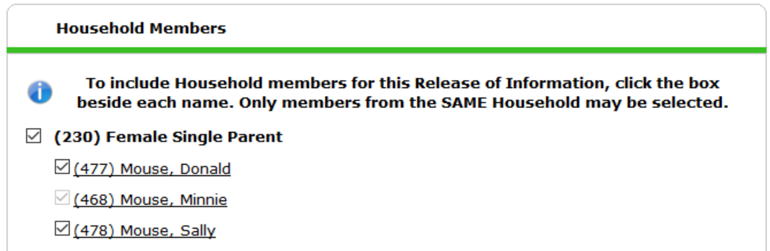
Transact two ROIs, one for the login provider (the agency) and one for the street outreach provider.

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.

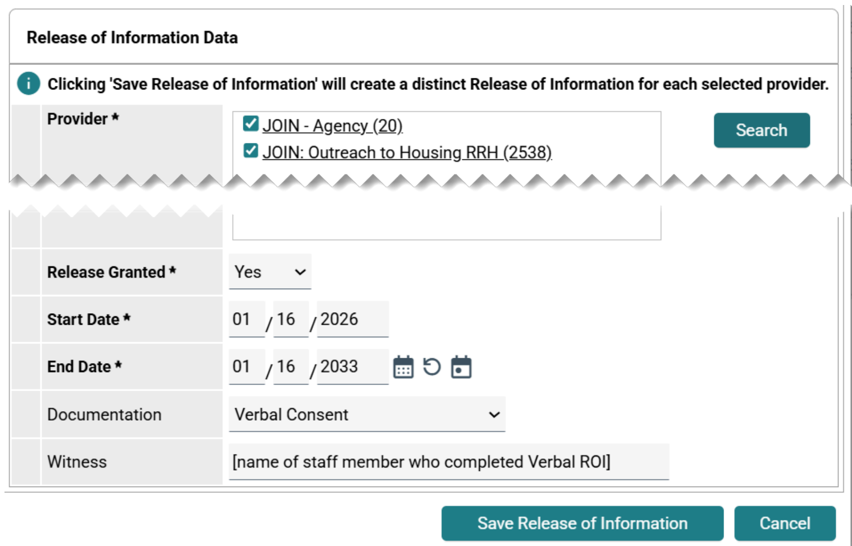


Step 3: Check all household members who are covered by verbal ROIs.



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).



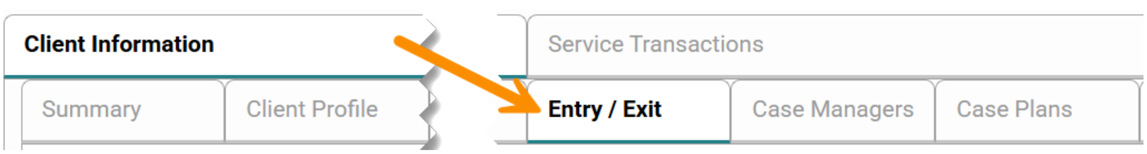
The ROI Start Date *cannot* be after the Entry Date. The Entry Date should be the date the participant did the intake.

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

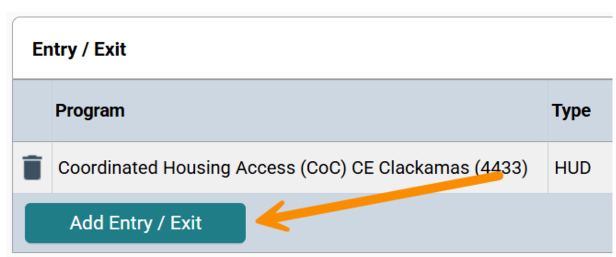
Click "Save Release of Information".

3. Program Entry

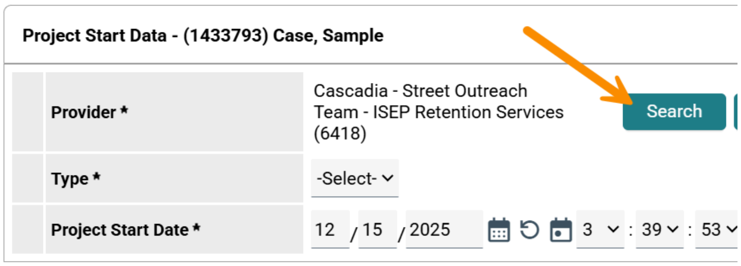
Do this step only if an entry for your Street Outreach program hasn't already been created.

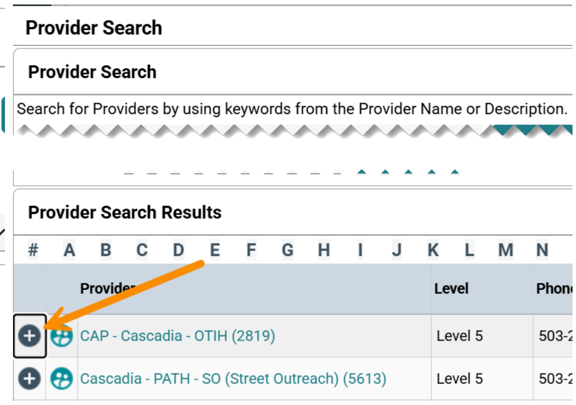


Step 1: In the client's record, click the Entry/Exit tab. Click "Add Entry/Exit".



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





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.

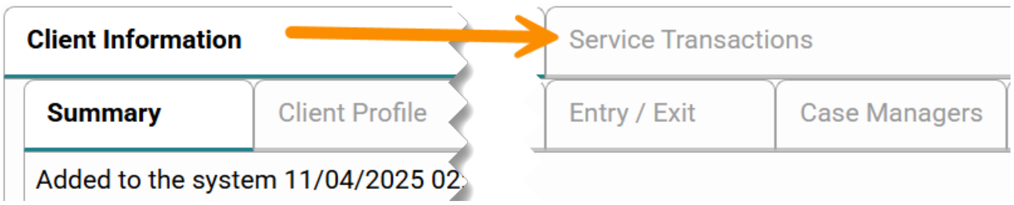
Date of Engagement:

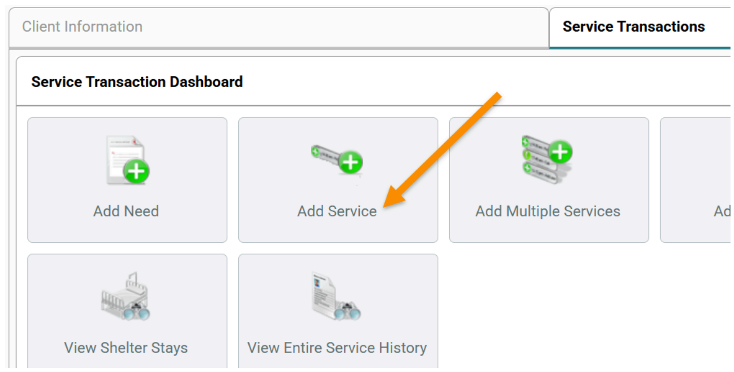
- An important question on the assessment is called Date of Engagement.
- Date of Engagement is defined by HUD as, “The date an interactive client relationship results in a deliberate client assessment or beginning of a case plan.” This is an important milestone in street outreach programs.
- If program 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

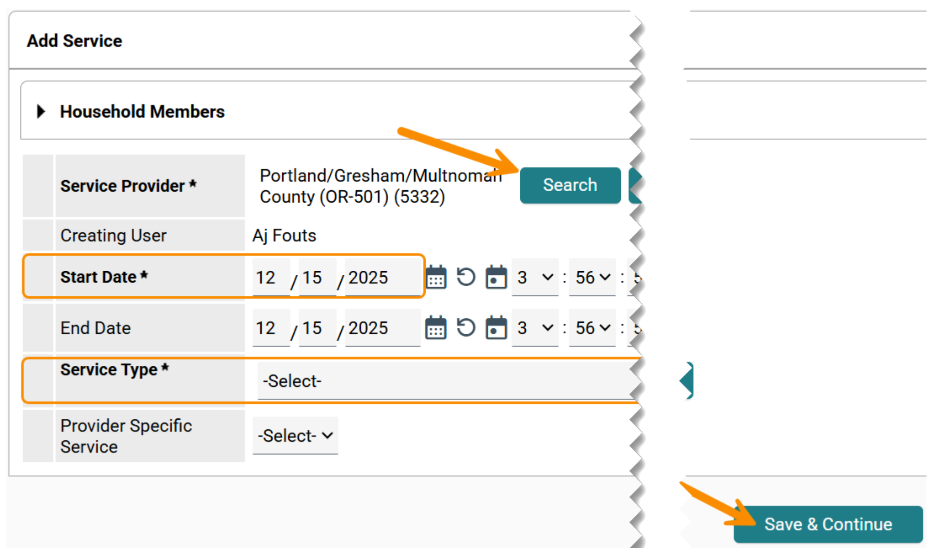
Step 1: In the client's record, click the Service Transactions tab. Click "Add Service".



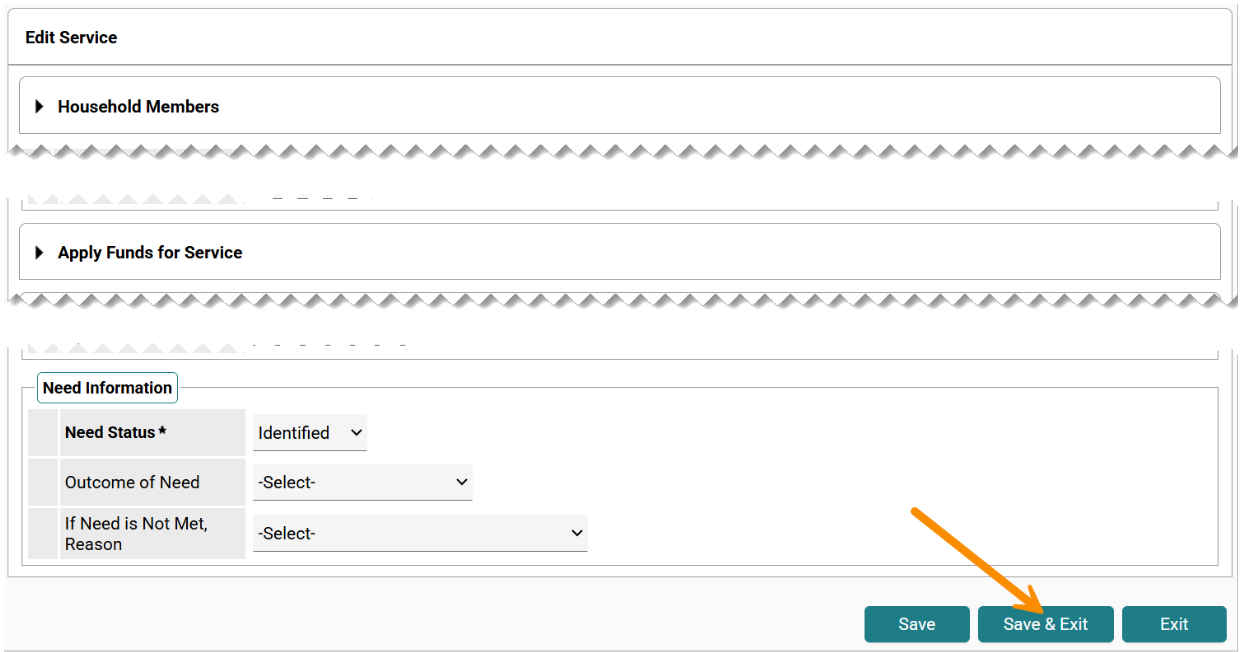


Step 2: Click Search and select the correct Street Outreach service provider. Edit the service Start Date, End Date and Service Type as needed.

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



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.



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.

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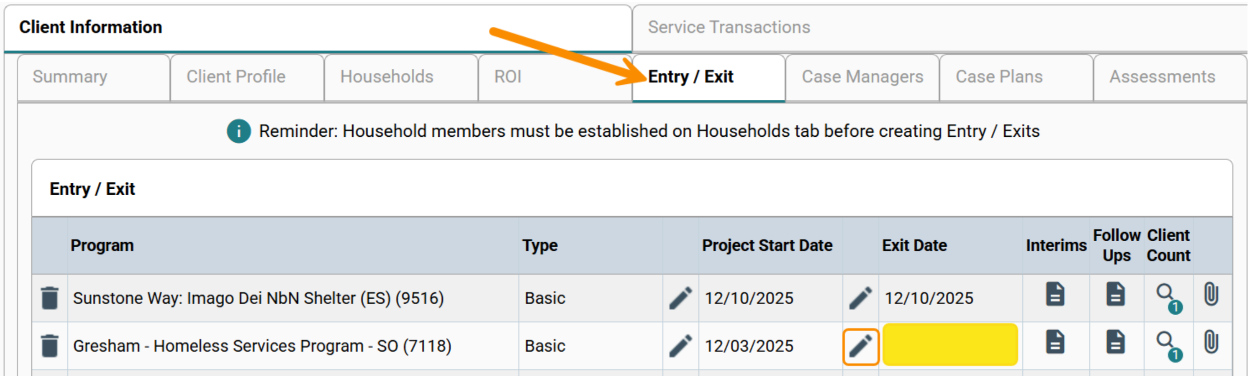
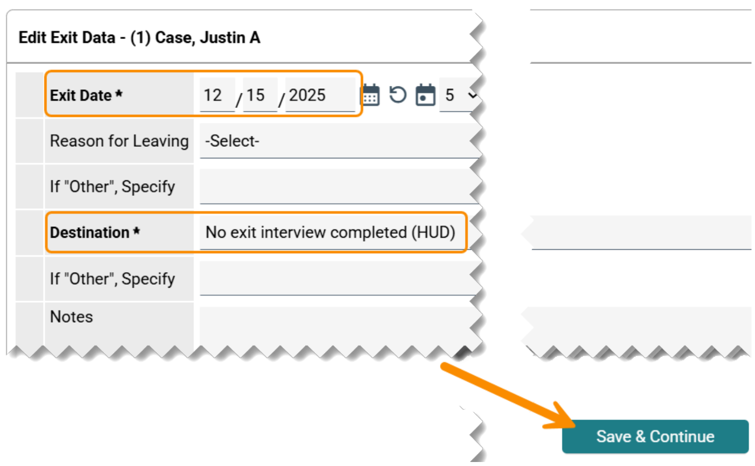
Step 1: In the client's record, click the Entry/Exit tab. Find the Street Outreach provider entry/exit.



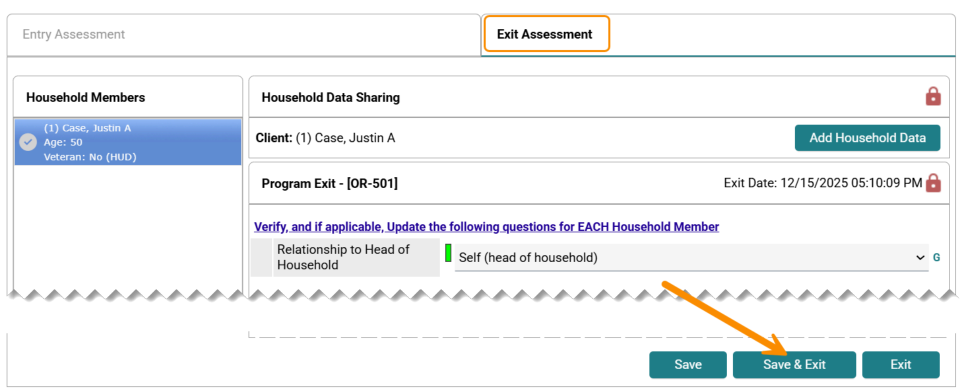
Step 2: Click the pencil next to the "Exit Date" field.

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" as the Exit Destination.



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".



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