

# Day Center HMIS Workflow

Note: This document does not walk through each and every step of the data workflow. Rather, this document outlines the general approach to doing data entry for Day Centers. Contact [hmishelp@multco.us](mailto:hmishelp@multco.us) if you have any questions.

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*Steps 1-6 describe the data entry process for a single individual. If you need to “batch” enter services for multiple people at once, read step 7.*

### 1. Triggers for data entry

*Only conduct HMIS data entry for the following services.*

- a. HMIS data should be collected and entered when any of the following “services” are rendered.

*Add definitions for site-specific services as needed.*

- i. MSST assessment  
*Use: Housing Related Coordinated Entry (BH-0500.3200)*
- ii. Referrals to emergency shelter  
*Use: Emergency Shelter (BH-1800)*
- iii. Housing Navigation  
*Use: Housing Counseling (BH-3700)*
- iv. Client Assistance  
*Use: Temporary Financial Assistance (NT)*
- v. Case management  
*Use: Case/Care Management (PH-1000)*
- vi. Peer support services  
*Use: Peer Counseling (RF-6500)*

### 2. Select or Create Client Record

- a. Search for an existing client record. Select it, if one exists.
  - i. If participants are in a household together, you *can* enter them both into the same E/E.
- b. Create a new record if one does not exist.
  - i. Do not create households for newly created records.

- ii. If a new participant only shares their street name at first, that is OK. Use any available information to complete the client record. Prioritize self-reported information. As the relationship with that person progresses and you get more information, update the profile accordingly.

### 3. Enter ROIs

- a. Click the “ROI” tab.
- b. For people that do not yet have a current ROI for the Day Center, transact two ROIs.
  - i. Remember to transact *two* ROIs, one for the login provider (agency level) and one for the Day Center.
  - ii. Both ROIs should last for 7 years. The ROI start date should always equal the earliest, recent Entry Date (for the entry where you’ll enter the assessment data). **The ROI Start Date *cannot* be after the Entry Date where you did the intake data entry.**

*If you will be conducting a MSST assessment, also add an ROI for the MSST.*

### 4. Create Entry/Exit for Day Center

*Do this step only if an E/E for the Day Center has not already been created.*

- a. In the client’s record, click the Entry/Exit tab.
- b. Click “Add Entry/Exit”.
- c. Select the *correct Day Center* provider.
- d. Select the “Basic” E/E type.
- e. Select the correct Project Start Date.
- f. Click “Save & Continue.”
- g. Enter all entry assessment data.
- h. Click “Save & Exit”.
- i. Exits from this provider are not necessary, but can be used when sending referrals to shelter or if it’s known that the client has moved to permanent housing.

### 5. Enter a Service

- a. In the client’s record, click the Service Transactions tab.
- b. Click “Add Service”.
  - i. If you need to enter multiple services for the same person, click “Add Multiple Services” instead.

- c. Select the *correct Day Center* service provider.
- d. Edit the service Start Date, End Date and Service Type as needed.
  - i. If entering multiple services:
    - 1. If you only need 1 “unit” of a particular service type, leave the “Number of Services” field at 1.
    - 2. Click “Add Another” to add another service.
    - 3. Repeat steps to enter all needed services.
- e. Click “Save & Continue”.
  - i. Attaching fund sources to services is not required as part of this workflow.
  - ii. Do not change any other information on the “Edit Service” screen.
  - iii. Leave the answer to “Need Status” as “Identified” toward the bottom of the screen.
- f. Scroll to the bottom of the screen. Click “Save & Exit”.
- g. Repeat steps in this section to transact as many services as needed.

*If the participant is doing a MSST assessment, continue to the next step.  
Otherwise, you're done!*

## 6. Create Entry/Exit for MSST.

*Do this step only if conducting a MSST assessment. Follow MSST workflow. Ensure that an ROI for the MSST has also been added.*

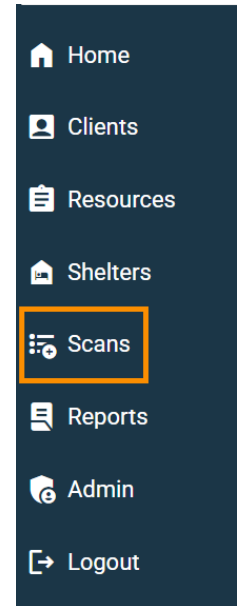
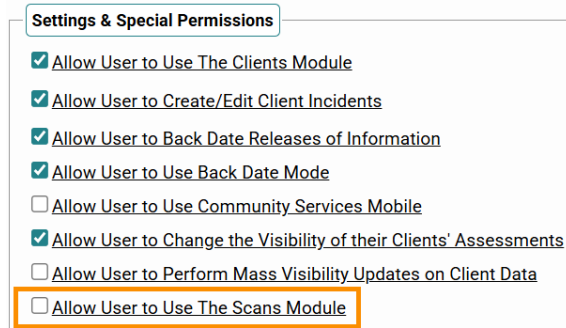
- a. Use “Basic” E/E type.
- b. Enter MSST assessment data.

## 7. Batch Enter Services

*This is an optional step and is only needed if entering one or more of the same service types for multiple people.*

- a. Before batch entering services, ensure that all needed client records, entry/exits and ROIs have been created/entered.
- b. For a given service type, identify all the Client IDs for which you need to transact services.
  - i. For example, if you need to transact peer support services, you can open an Excel workbook and temporarily document all the Client IDs you'll be entering for.
  - ii. Alternatively, within Skans, you can click “Manage Client Lists” and either create a new client list or use existing client lists to facilitate transacting multiple services. However, you still need to create the list using Client IDs (not client identifying information such as names).

- c. On the left side navigation menu, click Scans.
  - i. If you cannot see Scans on the side nav, you'll need an administrator at your agency or at Multnomah County to update your user account.
  - ii. If you are an agency admin, you can enable scans for specific users in the "Settings & Special Permissions" section of their User Admin.



- iii. If you choose to utilize the Client List function, you must create the list before adding services.
      1. Click on "Manage Client Lists" header.
      2. Click "Create New Client List".
      3. Name your list and select the Day Center provider. Click "Save and Continue".
      4. Add client profiles to this list by typing or pasting Client Profile ID # in the "Type or Skan Client ID to Add" field, then click "Add New Client to List".
        - a. If you have added a client to your list in error, click the trash can next to their name in the "Client List" section.
      5. Once you've added clients to your Client List as needed, click the "Exit" button.
- d. Click the "Multiple Services" tab.
- e. Select the correct Day Center provider.
- f. Edit the service Start Date, End Date and Service Type as needed.
- g. If transacting multiple service types, click Add Another. Select info for additional services as needed. Choose one of the following workflows to create services:
  - i. Adding services via "Start Skan" button.
    1. Click "Start Skan".
    2. Enter first Client ID to receive service. Press Enter or click "Skan Bar Code".
    3. Enter all Client IDs needed.
    4. When done, click "Exit".

- ii. Adding services via Client List feature.
  - 1. Click "Choose Clients from Client List".
  - 2. Select the correct list by clicking the grey plus sign next to the list name.
  - 3. To select all clients in this list to receive this service, click "Check ALL Clients" button. To select only some clients to receive this service, click the checkboxes next to client names as needed.
  - 4. Click "Enter Service for Clients".

- End -