

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 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 HMIS data collection & entry

Only conduct HMIS data collection & 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 (Release of Information)

- a. Click the “ROI” tab.
- b. For people that do not yet have a current ROI for the Day Center, transact two ROIs: one for the login provider (agency level) and one for the Day Center.
- c. **Release Granted:** Select Yes or No based on whether the participant agreed to share data or not.
- d. **Start date:** the ROI start date *must* equal the program start date *even if consent was collected on a different day*.
- e. **End date: 7 years**
after the start date.
- f. **Documentation:**
Select Verbal Consent.
- g. **Witness:** Enter the name of the person identified in the Witness field of the Verbal ROI form.
- h. **Client Signature:**
Skip this.
- i. **Case Signature:**
Skip this.
- j. Click **Save Release of Information**.

Clicking 'Save Release of Information' will create a distinct Release of Information for each selected provider.

Provider *	☒ Transition Projects (TPI) - Day Center (26) ☒ Transition Projects (TPI) - Agency (19)	Search
Release Granted *	Yes	
Start Date *	10 / 04 / 2025	
End Date *	10 / 04 / 2032	
Documentation	Verbal Consent	
Witness	John Doe	
Client Signature	Add	Skip Client Signature and Case Manager Signature
Case Manager Signature	Add	
Save Release of Information		Cancel

Wellsky added the new ROI buttons in early August, 2026. HSD does not require the use of these buttons. Data added to Client Signature and Case Manager Signature will not be migrated to Clarity HMIS.

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.
 - i. Note: SHS-funded day centers have an additional data collection requirement to complete the *Experiencing or at Imminent Risk of Homelessness* form, also called the "Pop A" form. This form should be completed for all adults who have triggered data collection (see above). The Pop A form determines how to answer the *Priority Population* question in HMIS.
- 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.

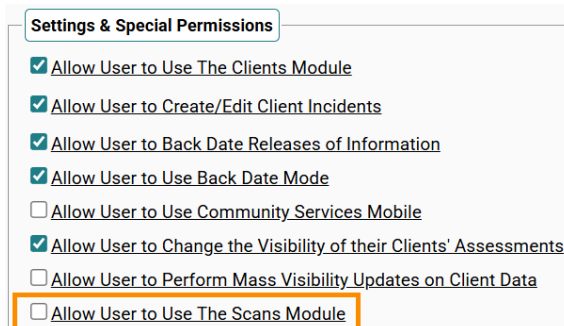
Do this step only if conducting a MSST assessment. Follow MSST workflow. Ensure that an ROI for the MSST has also been added.

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

7. Batch Enter Services

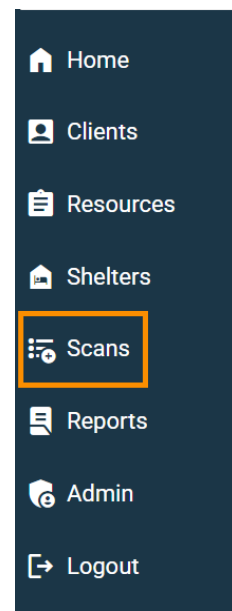
This is an optional step and is only needed if entering one or more of the same service types for multiple people.

- 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.



Settings & Special Permissions

- ☒ Allow User to Use The Clients Module
- ☒ Allow User to Create/Edit Client Incidents
- ☒ Allow User to Back Date Releases of Information
- ☒ Allow User to Use Back Date Mode
- ☐ Allow User to Use Community Services Mobile
- ☒ Allow User to Change the Visibility of their Clients' Assessments
- ☐ Allow User to Perform Mass Visibility Updates on Client Data
- ☐ Allow User to Use The Scans Module



- 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 -