

Housing Navigator Data Entry Guide

JULY 2021

A solid green horizontal bar at the bottom of the page.

Workflow

Receive Referral

Find or create Client in HMIS

Add an ROI

Create an Entry

Add Service(s)

Create an Exit

Create a ROI

Before adding any client information in HMIS, an ROI must be created.

1. Click Add ROI
2. Select the appropriate household members
3. Select the appropriate provider: Housing Navigation (16896)
4. Release Granted: Yes
5. Fill in the End Date: see below for the dates
 - a) Signed Informed Consent and Release of Information form (does not expire)
 - b) Verbal Consent (1 year)
6. Select the Documentation:
 - a) Signed Informed Consent from Client
 - b) Signed Release of Information from Client
 - c) Verbal Consent
7. Input the witness' name
8. Click Save Release of Information

The screenshot shows the 'Add ROI' form in the HMIS system. The form is divided into several sections: Summary, Client Information, Household Members, Release of Information, and Release of Information Data. Numbered callouts (1-8) highlight key steps in the process.

Summary
Client Information
Added to the system 04

Name
Date of Birth
Social Security

Household Members

To include Household members for this Release of Information, click beside each name. Only members from the SAME Household may be selected.

- (26277) Male Single Parent
 - (481707) Test, Test
 - (372848) Client, Test
- (27370) Couple With No Children
 - (552453) Test, Child
 - (481707) Test, Test

Release of Information

Provider
Add ROI

Households

ID	Type
26277	Male Single Parent *Test, Test
27370	Couple With No Children Test, Child

Release of Information Data

Provider *	The Homeless Leadership Alliance of Pinellas, Housing Navigation (16896)	My Provider
Release Granted *	Yes	
Start Date *	07 / 22 / 2021	
End Date *		
Documentation	-Select-	
Witness		

Save Release of Information

Create an Entry

Entry/Exits			
Program	Type	Project Start Date	Exit Date
Add Entry / Exit 1		No matches.	

(26277) Male Single Parent

(481707) Test, Test **2**

(372848) Client, Test

(27370) Couple With No Children

(552453) Test, Child

(481707) Test, Test

Project Start Data - (481707) Test, Test



















Provider *	The Homeless Leadership Alliance of Pinellas, Housing Navigation (16896) 3	Search	My Provider	Close
Type *	HUD 4			
Project Start Date *	07 / 10 / 2021 5	9	: 55	: 33 AM
<input type="button" value="Save & Continue"/>				

1. Click Add Entry/Exit
2. Select all appropriate household members
3. Select the appropriate provider name: Housing Navigation (16896)
4. Project Type: HUD
5. Project Start Date: Input the correct start date

Fill in the data entry fields

Tip:

- 1) Only one person in the household should be marked as “Self (head of household)”. If no one or two persons are listed as head of household, this will result in a Household error in reports.

Date of Birth	08 / 01 / 2000    
Date of Birth Type	Full DOB Reported (HUD) 
Primary Race	White (HUD) 
Secondary Race	White (HUD) 
Ethnicity	Non-Hispanic/Non-Latino (HUD) 
Gender	Male 
Relationship to Head of Household	Self (head of household)
Where was your last permanent residence?	Gulfport 
How long have you been living in Pinellas County?	Lifetime Resident 
Is this episode of homelessness directly related to the COVID-19 pandemic? Select N/A if the client is not homeless.	N/A 
Is the client receiving this service (rent assistance, utility assistance, etc) due to the COVID-19 pandemic?	No 
Housing Status	Category 2 - At imminent risk of losing housing (HUD)
Client Location	FL-502 (St. Petersburg/Clearwater/Largo/Pinellas County CoC)
Prior Living Situation *	Rental by client, no ongoing housing subsidy (HUD)
Length of Stay in Previous Place	One year or longer (HUD) 
Did you stay less than 7 nights?	No 
Domestic violence victim/survivor	No (HUD) 
If yes for Domestic violence victim/survivor, when experience occurred	-Select- 
If yes for Domestic Violence Victim/Survivor, are you currently fleeing?	-Select- 

Update the four HUD Verifications

The four HUD Verifications are Income, Non-Cash Benefits, Health Insurance, and Disabilities. These fields must be updated for all adults (18 or older) in the Household.

Refer to [this guide](#) for a video on how to update Hud Verifications.

Add Service(s)

Create a Service for every day that you provided a service. Ex. If you provided case management for 4 days, there should be 4 services in HMIS.

1. Select all appropriate household members
2. Choose the correct provider: Housing Navigation (16896)
3. Select the Service Type
4. Click Save & Continue











- (26277) Male Single Parent**
 - (481707) Test, Test (Primary Client)
 - (372848) Client, Test
- (27370) Couple With No Children**
 - (552453) Test, Child
 - (481707) Test, Test (Primary Client)

Service Provider *	The Homeless Leadership Alliance of Pinellas, Housing Navigation (16896) ▼
Creating User	User Name
Start Date *	07 / 22 / 2021 1 ▼ : 23 ▼ : 21 ▼ PM ▼
End Date	07 / 22 / 2021 1 ▼ : 23 ▼ : 21 ▼ PM ▼
Service Type *	-Select- ▼ Look Up
Provider Specific Service	-Select- ▼

4 Save & Continue

Add Service(s) (cont.)

1. If needed, brief notes can be added here. No sensitive client information should be here.
2. Record how many minutes were sent on this Service.

Service Provider *	 The Homeless Leadership Alliance of Pinellas, Housing Nav
Creating User	User Name
Start Date *	07 / 22 / 2021    1 : 23 : 21 PM
End Date	07 / 22 / 2021    1 : 23 : 21 PM
Service Type *	 Case/Care Management (PH-1000)
Provider Specific Service	-Select- v
Service Staff	-Select- v
Service Notes	<div data-bbox="1378 868 2372 1011"> 1</div>
How many minutes were spent on this Service?	<input data-bbox="1595 1086 1714 1143" type="text"/>  2

Add Service(s) (cont.)

Need Information

Need Status *	Closed <input type="button" value="v"/> 1
Outcome of Need	Fully Met <input type="button" value="v"/> 2
If Need is Not Met, Reason	-Select-

3

Save Save & Exit

1. Need Status: Closed




2. Outcome of Need: Fully Met

The above fields must have Closed and Fully Met to appear in a report

3. Click Save & Exit




Create an Exit

1. Click on the pencil under the Exit Date column

Entry/Exits					
Program	Type		Project Start Date		Exit Date
The Homeless Leadership Alliance of Pinellas, Housing Navigation	HUD		07/10/2021		

Create an Exit (cont.)

1. Input the Exit Date
2. Select a Reason for Leaving
3. Select a Destination
4. If needed, very generic notes can be added here.
Do not put sensitive client information here.
5. Click Save & Continue

Exit Date *	1	07 / 10 / 2021				1	▼	:	52	▼	:	26
Reason for Leaving		2 Completed program										
If "Other", Specify		<input type="text"/>										
Destination *	3	Rental by client, no ongoing housing subsidy (HUD)										
If "Other", Specify		<input type="text"/>										
Notes		4										

Update the four HUD Verifications

The four HUD Verifications are Income, Non-Cash Benefits, Health Insurance, and Disabilities. These fields must be updated for all adults (18 or older) in the Household.

Refer to [this guide](#) for a video on how to update Hud Verifications.

Questions?

Reach out to HMIS via the [Help Desk](#) with any questions or concerns.