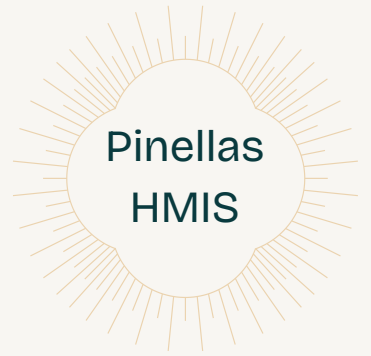


Housing Navigation Workflow



Household & ROI

Create a new household or verify the existing one. Then, add the Release of Information (ROI). Remember, no client data should be input into HMIS prior to having a valid ROI!

1

Project Start

Complete an Entry Assessment, ensuring that all appropriate household members are included. Project start is the date the client first began working with the project; generally this is the first provision of service. Be sure to complete all HUD Verifications (income, insurance, disability, & non-cash benefits), and verify that all client information is true & correct.

2

Services

Add your Service Transaction(s), again ensuring that all appropriate household members are included. Services may include case management, housing search assistance, resource connection, etc. A client may have multiple service transactions while entered into a project. All services must occur on or after Entry, and before Exit.

3

Project Exit

The exit date indicates that a client is no longer in the project; they are no longer receiving Housing Navigation services. Select a Reason for Leaving, a Destination, and add a brief note when possible.

4