# Services Only Workflow

Pinellas HMIS

## 1 ROI

No client data should be input into HMIS prior to having a valid Release of Information (ROI)! Under the ROI tab of the client's profile, click Add ROI. Complete all fields, then Save and Exit.

## 2 Household

If applicable, create a household for the client(s) being served. Otherwise, verify that the existing Household information is correct.

## 3 CM Tools

OPTIONAL: assign yourself as the client(s) Case Manager (CM), Add a Goal, and add subsequent Case Notes.

## 4 Services

Add your Service Transaction(s), ensuring all appropriate household members are included. Services may include job search assistance, mail pick-up, laundry, etc. A client may have multiple service transactions. The Start Date and End Date of a Service Transaction should be the same.

Homeless Management Information System (HMIS)
Release of Information (ROI)
Case Manager (CM)

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