Mini Guide: Program Entry

Basic guide to help HMIS users enroll clients in projects.

Updated 1/6/17

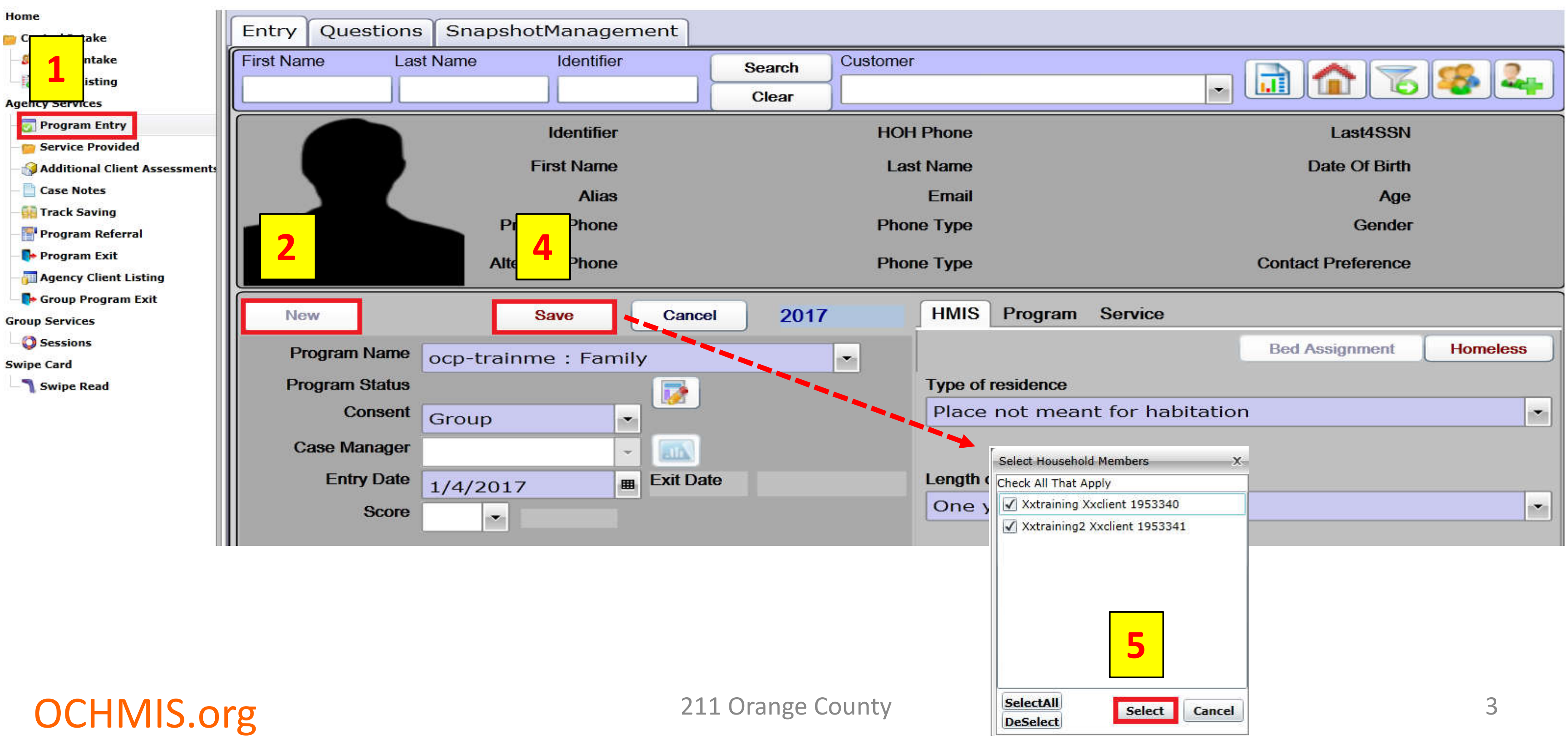
Program Entry Overview

- Before enrolling a client/household in a project, make sure you have entered all required information on the Client Intake page for all household members before moving on to Program Entry. Only clients enrolling in the project should be listed on the Client Intake page. See the Client Intake Mini Guide for more information.
- The Program Entry process is used:
  - To enroll clients in a particular project
  - To assess the client's current situation and eligibility for that project.

NOTE: Program Entry questions must be recorded for all household members.

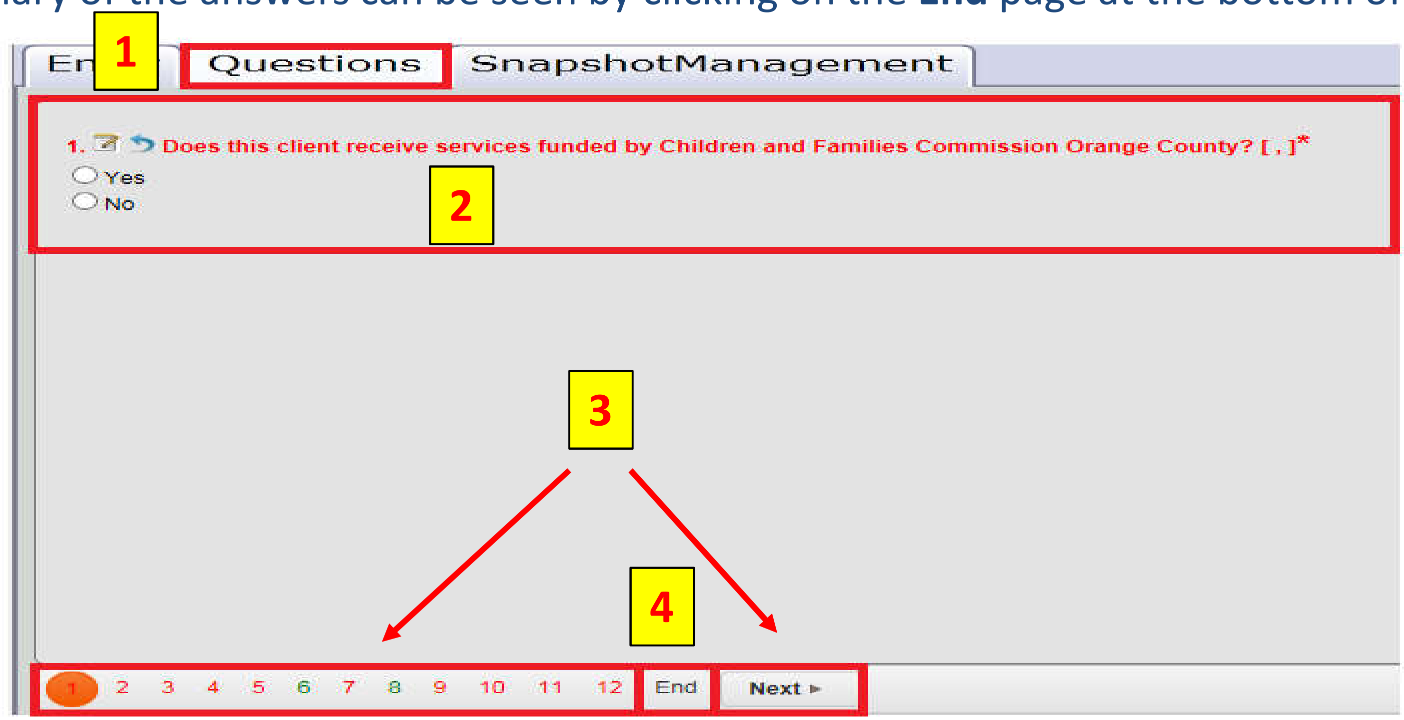
Enrolling the Client

1. Click on the **Program Entry** page.
2. Click **New** to enroll a new client/household. The head of household should be enrolled first.
3. Fill in all required (purple) fields.
4. Click on **Save**.
5. All clients with checks next to their names will be enrolled in the project. Make sure all clients are selected, and click on **Select**.



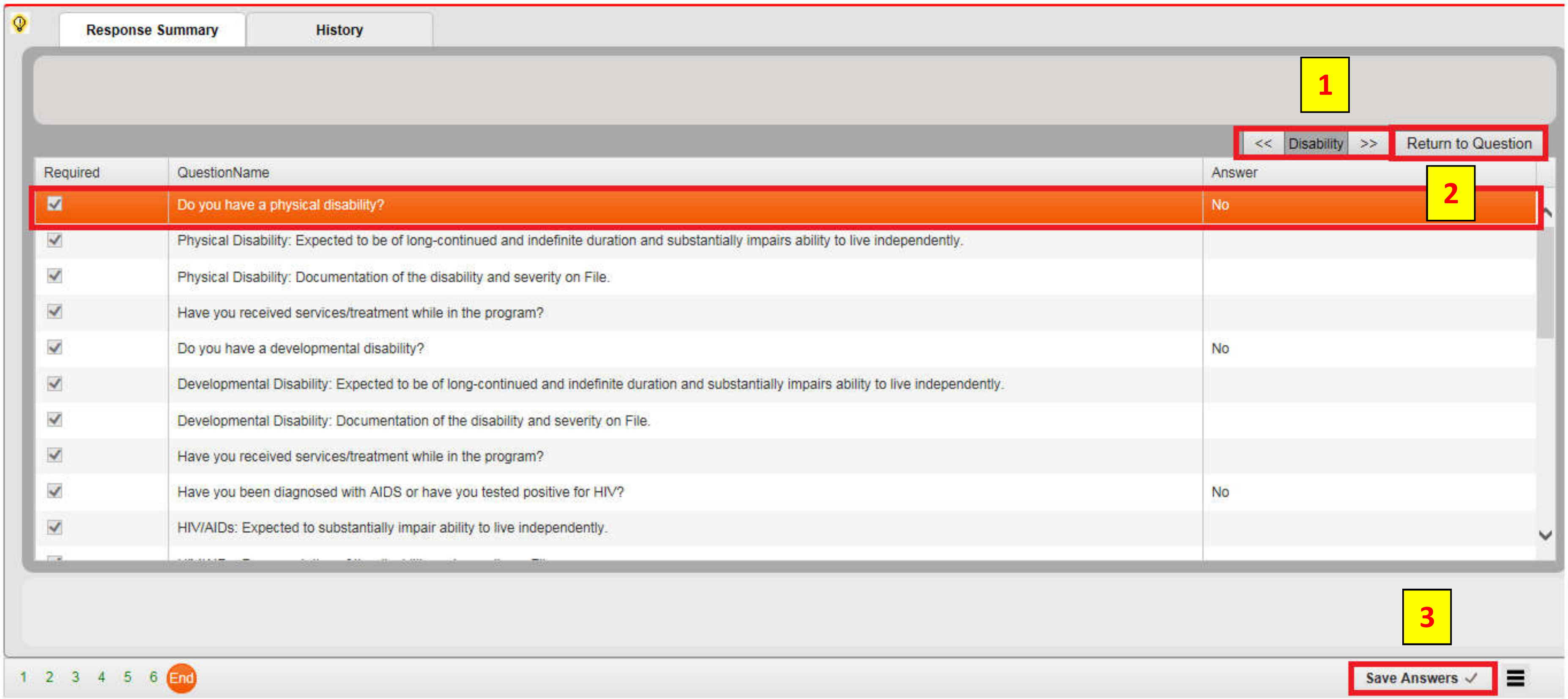
Answering Program Entry Questions

1. To answer the **Program Entry** questions for the client, click on the **Questions** tab.
2. Answer the **Program Entry** questions on the first tab. All required questions will appear in red.
3. Click on **Next** to go to the next page of questions. If a required question has not been answered on a tab, the page number will appear in red.
4. A summary of the answers can be seen by clicking on the **End** page at the bottom of the screen.



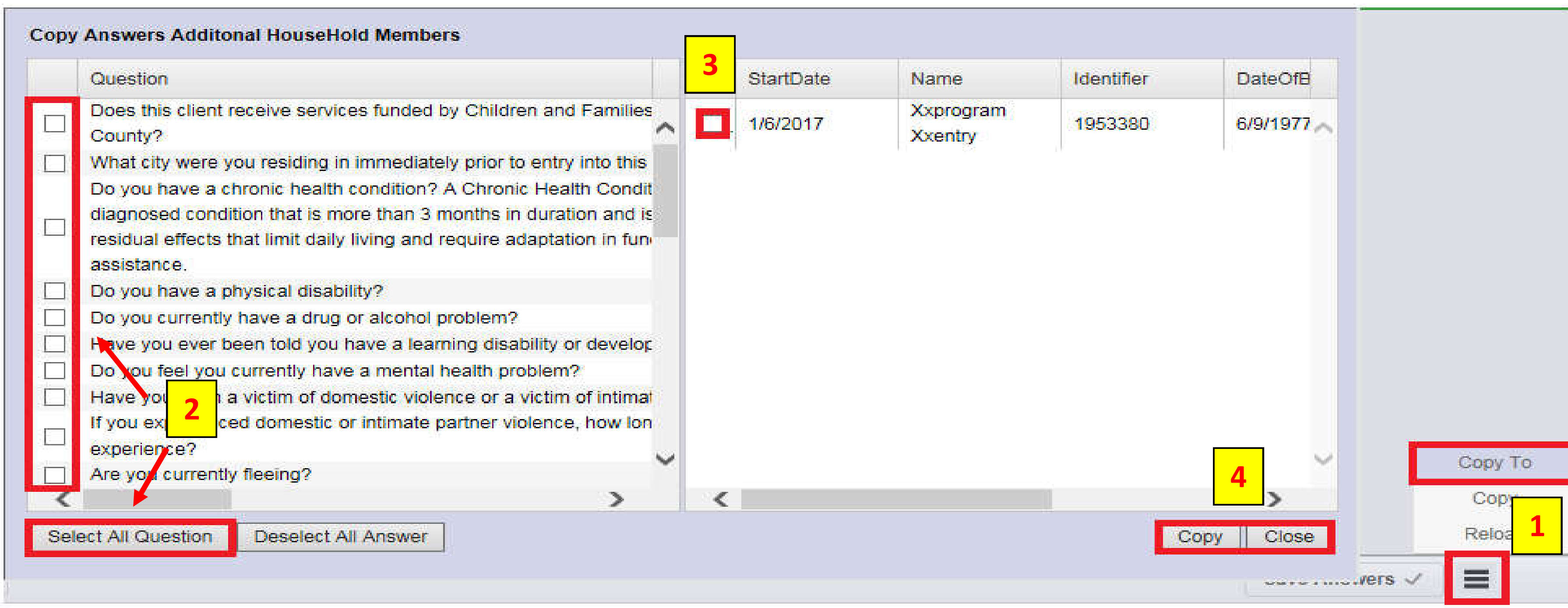
Reviewing Questions

1. Once on the **End** tab, click on the arrows to review the answers on each page.
2. You can select a question and click on **Return to Question** to modify an answer.
3. Click on **Save Answers** to save all responses.



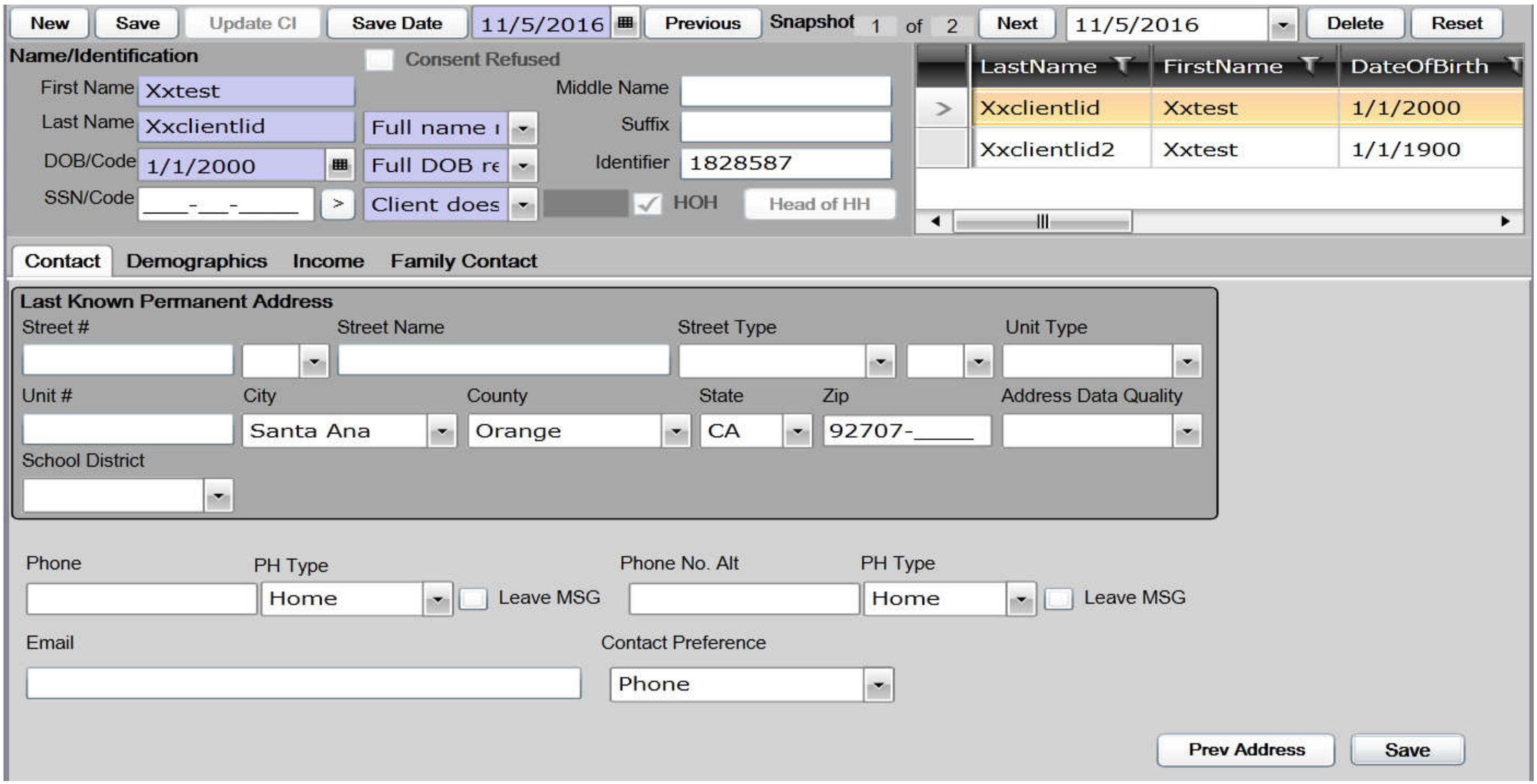
Copying Questions to Other Household Members

1. To copy the answers that have been entered to other household members, click on the **Hamburger icon**, and then click **Copy To.**
2. Select the questions that are applicable to be copied from the current client, or click **Select All Questions** to copy all questions.
3. Select the member(s) of the household you want to copy the answers to.
4. To copy the responses to the questions you selected to the selected household members, click on **Copy**, and then click on **Close**.



Snapshot Management

Check out the Snapshot Management Mini Guide



Questions?

Contact your Agency Administrator.