



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**.

The screenshot displays the OCHMIS software interface for enrolling a client. The interface is divided into several sections:

- Sidebar (Left):** Contains navigation options such as 'Home', 'Take Intake Listing', 'Agency Services', 'Program Entry' (highlighted with a red box and number 1), 'Service Provided', 'Additional Client Assessments', 'Case Notes', 'Track Saving', 'Program Referral', 'Program Exit', 'Agency Client Listing', 'Group Program Exit', 'Group Services', 'Sessions', 'Swipe Card', and 'Swipe Read'.
- Main Form (Top):** Features tabs for 'Entry', 'Questions', and 'SnapshotManagement'. It includes search fields for 'First Name', 'Last Name', and 'Identifier', along with a 'Search' button and a 'Customer' dropdown menu.
- Main Form (Middle):** Displays a silhouette of a person (highlighted with a red box and number 2) and a table of client information. The table has columns for 'Identifier', 'First Name', 'Alias', 'Phone', 'HOH Phone', 'Last Name', 'Email', 'Date Of Birth', 'Age', 'Gender', and 'Contact Preference'. A red box and number 4 highlight the 'Save' button.
- Main Form (Bottom):** Contains form fields for 'Program Name' (set to 'ocp-trainme : Family'), 'Program Status', 'Consent' (set to 'Group'), 'Case Manager', 'Entry Date' (set to '1/4/2017'), and 'Exit Date'. It also includes buttons for 'New', 'Save', and 'Cancel', and a '2017' year selector.
- Dialog Box (Bottom Right):** Titled 'Select Household Members', it contains a list of household members with checkboxes. Two members are checked: 'Xxtraining Xxclient 1953340' and 'Xxtraining2 Xxclient 1953341'. A red box and number 5 highlight the 'Select' button at the bottom of the dialog box.

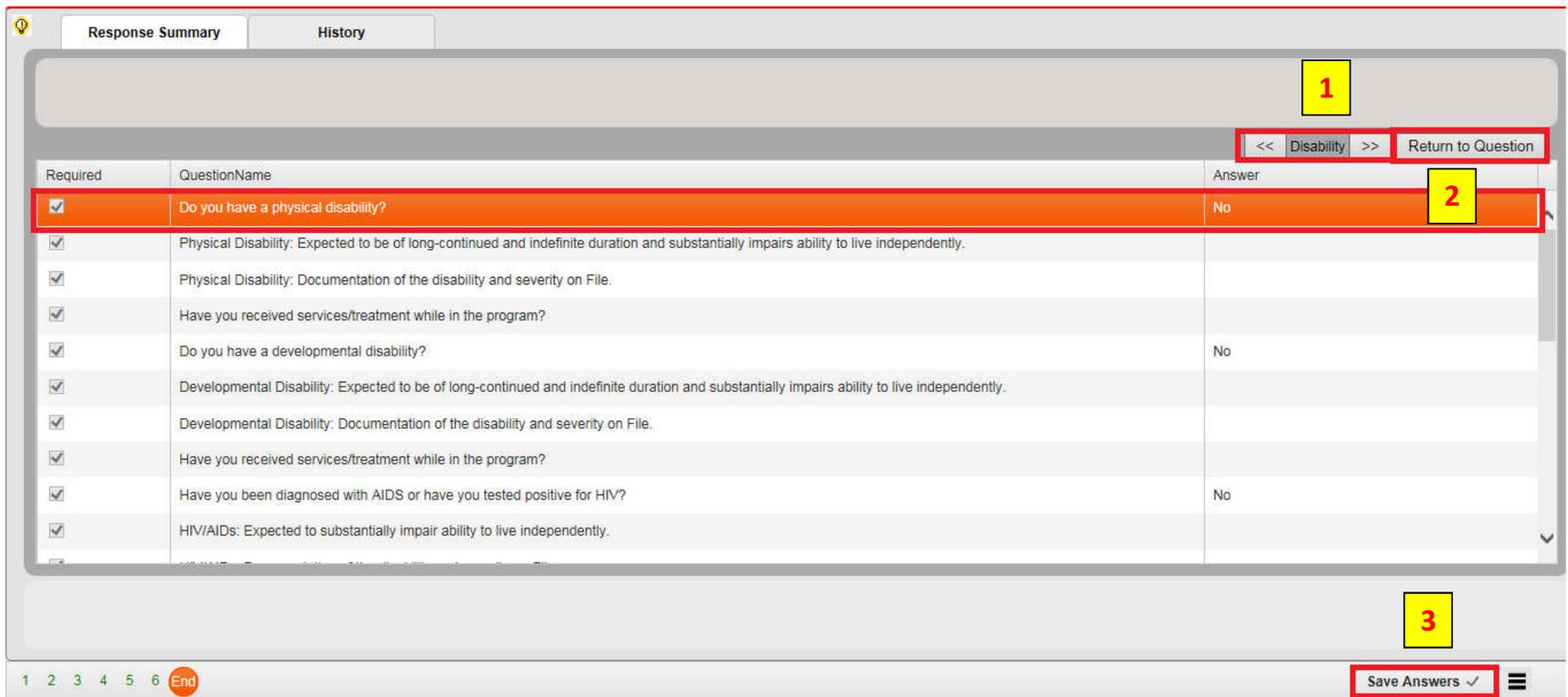
Answering Program Entry Questions

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.

The screenshot shows a web application interface for answering program entry questions. At the top, there are three tabs: 'End', 'Questions', and 'SnapshotManagement'. The 'Questions' tab is highlighted with a red box and a yellow callout '1'. Below the tabs, a question is displayed in red text: '1. Does this client receive services funded by Children and Families Commission Orange County? [,]*'. Below the question are two radio button options: 'Yes' and 'No'. A yellow callout '2' is placed over the question text. At the bottom of the screen, there is a navigation bar with buttons for '1', '2', '3', '4', '5', '6', '7', '8', '9', '10', '11', '12', 'End', and 'Next >'. A yellow callout '3' is placed over the 'Next >' button, and a yellow callout '4' is placed over the 'End' button. Red arrows point from callout '3' to callout '4' and from callout '3' to the 'Next >' button.

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.



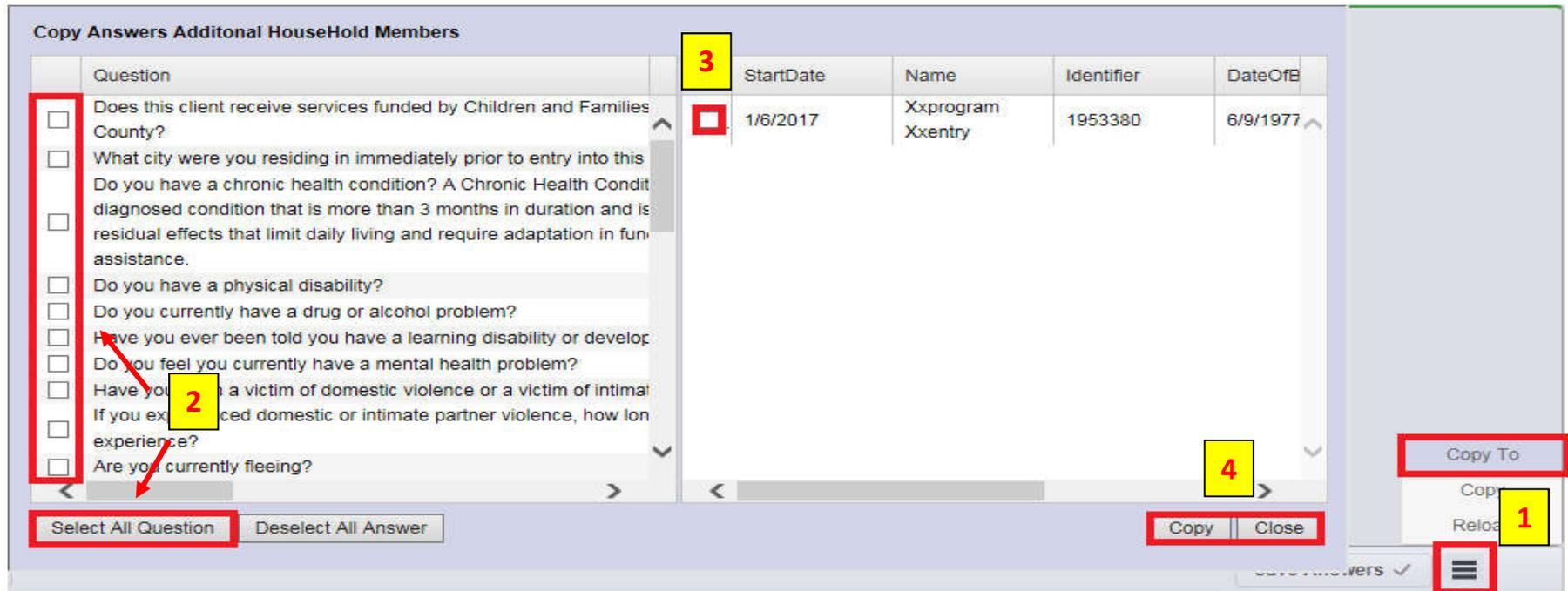
The screenshot shows the OCHMIS interface with the following elements:

- Response Summary** and **History** tabs at the top.
- A navigation bar with a yellow box labeled **1** containing arrows and the text **Disability**.
- A **Return to Question** button next to the navigation bar.
- A table with columns: **Required**, **QuestionName**, and **Answer**.
- The first row of the table is highlighted in orange and has a yellow box labeled **2** next to the **Answer** column.
- A **Save Answers** button with a checkmark and a menu icon at the bottom right, with a yellow box labeled **3** next to it.
- A bottom navigation bar with tabs 1 through 6, where **End** is selected.

Required	QuestionName	Answer
<input checked="" type="checkbox"/>	Do you have a physical disability?	No
<input checked="" type="checkbox"/>	Physical Disability: Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently.	
<input checked="" type="checkbox"/>	Physical Disability: Documentation of the disability and severity on File.	
<input checked="" type="checkbox"/>	Have you received services/treatment while in the program?	
<input checked="" type="checkbox"/>	Do you have a developmental disability?	No
<input checked="" type="checkbox"/>	Developmental Disability: Expected to be of long-continued and indefinite duration and substantially impairs ability to live independently.	
<input checked="" type="checkbox"/>	Developmental Disability: Documentation of the disability and severity on File.	
<input checked="" type="checkbox"/>	Have you received services/treatment while in the program?	
<input checked="" type="checkbox"/>	Have you been diagnosed with AIDS or have you tested positive for HIV?	No
<input checked="" type="checkbox"/>	HIV/AIDs: Expected to substantially impair ability to live independently.	

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**.



The screenshot shows a web application window titled "Copy Answers Additional Household Members". It features a list of questions on the left and a table of household members on the right. The interface includes several buttons for managing the copy process.

Question	Start Date	Name	Identifier	Date of Birth
<input type="checkbox"/> Does this client receive services funded by Children and Families County?	<input checked="" type="checkbox"/> 1/6/2017	Xxprogram Xxentry	1953380	6/9/1977

Numbered callouts in the image indicate the following steps:

- 1**: Hamburger icon (three horizontal lines) in the bottom right corner.
- 2**: "Select All Question" button at the bottom left.
- 3**: Red square checkbox in the "Start Date" column of the table.
- 4**: "Copy" button at the bottom right.



Snapshot Management

Check out the Snapshot Management Mini Guide

11/5/2016

 Snapshot 1 of 2

 11/5/2016

Name/Identification Consent Refused

First Name: Xxtest Middle Name:
 Last Name: Xxclientlid Full name: Suffix:
 DOB/Code: 1/1/2000 Full DOB re: Identifier: 1828587
 SSN/Code: Client does: HOH

Last Name	First Name	Date Of Birth
Xxclientlid	Xxtest	1/1/2000
Xxclientlid2	Xxtest	1/1/1900

Last Known Permanent Address

Street #: Street Name: Street Type: Unit Type:
 Unit #: City: Santa Ana County: Orange State: CA Zip: 92707-____ Address Data Quality:
 School District:

Phone: PH Type: Home Leave MSG
 Phone No. Alt: PH Type: Home Leave MSG
 Email: Contact Preference: Phone



Questions?

Contact your Agency Administrator.