



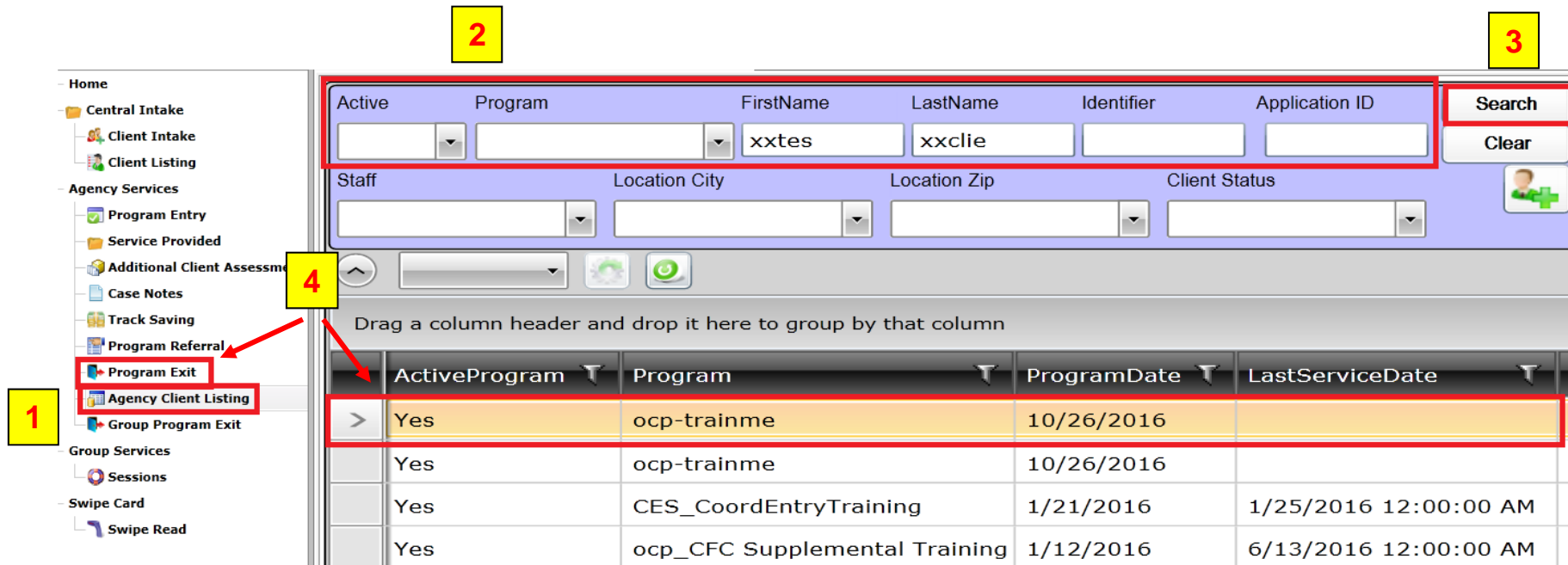
# Mini Guide: Program Exit Page

Basic guide to help HMIS users exit clients out of a project in HMIS.

Updated 11/6/16

# Search for the Enrollment

1. Go to the **Agency Client Listing** page on the **Navigation Pane**.
2. Search for the enrollment that you are going to exit by any of the criteria below.
3. Click on **Search**.
4. Select the enrollment you would like to exit, and go to the **Program Exit** page.



The screenshot shows the OCHMIS Agency Client Listing interface. The navigation pane on the left (callout 1) has 'Agency Client Listing' selected. The search form at the top (callout 2) contains fields for Active, Program, FirstName (xxtes), LastName (xxclie), Identifier, and Application ID. A 'Search' button (callout 3) is located to the right. Below the search form is a table with columns: ActiveProgram, Program, ProgramDate, and LastServiceDate. The first row of the table is highlighted in yellow (callout 4).

ActiveProgram	Program	ProgramDate	LastServiceDate
> Yes	ocp-trainme	10/26/2016	
Yes	ocp-trainme	10/26/2016	
Yes	CES_CoordEntryTraining	1/21/2016	1/25/2016 12:00:00 AM
Yes	ocp_CFC Supplemental Training	1/12/2016	6/13/2016 12:00:00 AM

# Exit Program Tab

1. Click on **Begin Exiting Client out of Program\***.
2. Select all the members of the family, if you want to exit them all\*\*.
3. Enter client's **Destination** and **Reason for Leaving**.
4. Click on **Save**.

\*A snapshot will automatically be created.

\*\*If you want to exit just one person in the household, remember to take her/him out of the household first, and then you can exit the person alone.

The screenshot shows the 'Exit Program' tab in a software application. At the top, there are navigation tabs: 'Exit Program', 'Exit Questions', 'SnapshotManagement', 'Exit', and 'Followup'. Below these is a search bar with fields for 'FirstName', 'LastName', 'Identifier', and 'Customer', along with 'Search' and 'Clear' buttons. The main area displays client information for Identifier 1828587, including a photo of penguins, first name 'Xxtest', last name 'Xxclientid', date of birth '1/1/2000', age '16', gender 'Transgendered', and contact preference 'Phone'. A 'Select Household Members' dialog box is open, showing a list of household members with checkboxes. Two members are selected, and the 'Select' button is highlighted. At the bottom, there are fields for 'Entry Date' (11/5/2016) and 'Exit Date'. A 'Begin Exiting Client Out of Program' button is highlighted with a red box and a yellow callout '1'. Below it are 'Destination' and 'Reason For Leaving' dropdown menus, both highlighted with red boxes and a yellow callout '3'. A 'Save' button is highlighted with a red box and a yellow callout '4'. A yellow callout '2' points to the 'Select' button in the dialog box.

# Exit Questions Tab

1. Click on the **Exit Questions** tab.
2. If the client's responses to the Program Entry questions haven't changed, you can copy their Program Entry questions to the Program Exit page. To do this, click on the **Hamburger icon**, and then click **Copy**.
3. Select the question set that you would like to copy the client's responses from. Click on **Copy**, then **Close** the window.

1

Exit Program **Exit Questions** SnapshotManagement Exit Followup

1. Does this client receive services funded by Children and Family Services?  
 Yes  
 No

Copy Answers

Question Code: All

Program	Activity	ActivityType	ProgramDate	Code	ID
ocp-trainme	Entry	Entry	11/1/2016 12:00:00 PM	sys_P_HUDEntry	15
ocp-trainme	Exit	Exit	11/1/2016 12:00:00 PM	sys_P_HUDEntry	15
ocp-trainme	Follow-up	Profile	11/1/2016 12:00:00 PM	OC_Follow-Up	15

Copy Close

2

3

1 2 3 4 5 6 End Next ▶

## Exit Questions Tab

1. If the client's responses have changed since Program Entry, answer the **Exit Questions** on the first tab. All required questions will appear in red.
2. 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.
3. A summary of the answers can be seen by clicking on the **End** page at the bottom of the screen.

Exit Program | Exit Questions | SnapshotManagement | Exit | Followup

1. Does this client receive services funded by Children and Families Commission Orange County? [ , ]\*

Yes  
 No

1

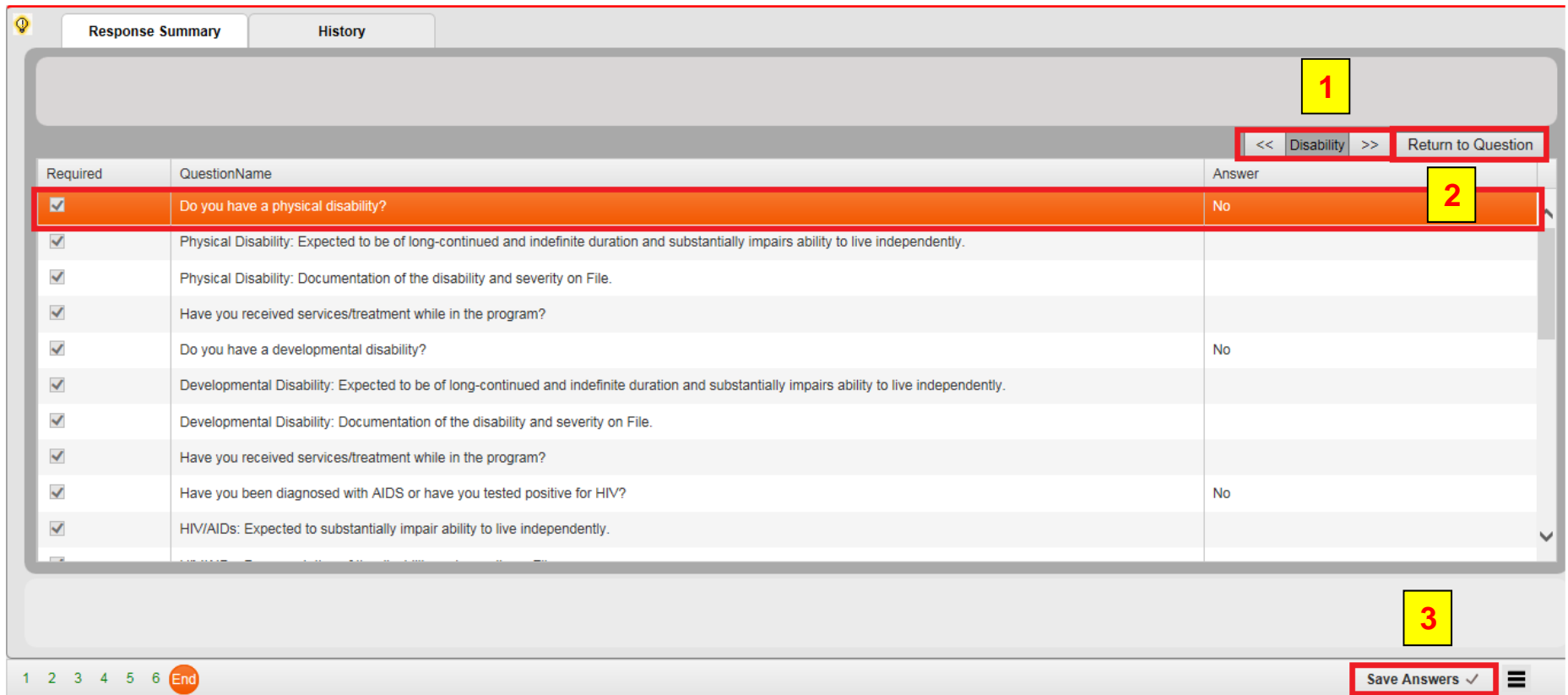
2

1 2 3 4 5 6 End Next >

3

# Exit Questions Tab (continued)

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.



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 interface titled "Copy Answers Additional HouseHold Members". It features a list of questions on the left, a table of household members in the center, and a control panel at the bottom. Numbered callouts indicate the following steps:

- 1:** Points to the "Copy To" button in the top right corner of the interface.
- 2:** Points to the "Select All Question" button at the bottom left of the question list.
- 3:** Points to the "Xxtest" checkbox in the "FirstName" column of the household member table.
- 4:** Points to the "Copy" and "Close" buttons at the bottom right of the question list.

Question	FirstName	LastName	Identifier	DateOfB
<input type="checkbox"/> Was the client connected with SOAR?	<input type="checkbox"/> Xxtest	Xxclientid	1828587	1/1/2000
<input type="checkbox"/> Does this client receive services funded by Children and Families County?				
<input type="checkbox"/> Do you have a physical disability?				
<input type="checkbox"/> Do you have a developmental disability?				
<input type="checkbox"/> Have you been diagnosed with AIDS or have you tested positive?				
<input type="checkbox"/> Do you feel you have a mental health problem?				
<input type="checkbox"/> Do you have a drug or alcohol problem?				
<input type="checkbox"/> Chronic Health Condition				
<input type="checkbox"/> Are you currently employed?				
<input type="checkbox"/> If No for "Employed" Why Not Employed				
<input type="checkbox"/> Housing Assessment at Exit				

# Snapshot Management Tab

1. Click on the **Snapshot Management** tab.
  - The exit snapshot will be the latest snapshot (e.g. 2 of 2, or 3 of 3).
  - Demographics, Income and Household member information is captured on the exit snapshot.
  - Information on the exit snapshot should match the household's situation at exit.
2. Click on **Demographics** sub-tab, and verify that the client's demographic information is updated.
3. Click on **Save**.

The screenshot shows the 'SnapshotManagement' tab selected. The 'DOB' field is highlighted with a yellow box labeled '2'. The 'Demographics' sub-tab is selected. The 'Save' button is highlighted with a yellow box labeled '3'. A yellow box labeled '1' points to the 'SnapshotManagement' tab.

LastName	FirstName	DateOfBirth
Xxclientlid	Xxtest	1/1/2000
Xxclientlid2	Xxtest	1/1/1900

Demographics Section:

Housing Category: **Category 1 - Homeless** | Family Type: **Single Parent**

Deceased Date: [ ] | Deceased:  | Relation: **Self** | Gender: **Transgendered Fer**

Disabled: **Don't know** | Veteran: **Yes** | Ethnicity: **Non-Hispanic/Non-**

Education Level: **9th Grade** | 1st Language: [ ] | 2nd Language: [ ]

Marital Status: [ ] | Maiden Name: [ ]

TB Clearance Date: [ ] | Clinic: [ ] | **Save**

Race [Choose As Many As Apply]:

Asian |  Black or African American |  Native Hawaiian or Other Pacific Islander |  American Indian or Alaska Native |  White





# Snapshot Management Tab (continued)

1. Click on **Income** sub-tab, and verify that the client's income information matches the client's exit income. This step should be completed for each client's enrollment.
2. Click on **Save**.

Exit Program | Exit Questions | SnapshotManagement | Exit | Followup

New | Save | Update CI | Save Date 11/15/2016 | Previous | Snapshot 2 of 2 | Next 11/15/2016 | Delete | Reset

**Name/Identification**  Consent Refusal

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 Head of HH

LastName	FirstName	DateOfBirth
Xxclientlid	Xxtest	1/1/2000
Xxclientlid2	Xxtest	1/1/1900

**2** **Income** Demographics Family Contact

IND.	MONTHLY	QUARTERLY	GROSS	% POV.	AMI	AMI Range	Accepted	Verified
2	100.00	300.00	1200.00	7.53	ExLow	0-30%	<input type="checkbox"/>	<input type="button" value="Note"/>

Income Source: Temporary Assistanc Stated Income: 100.00

Pay Interval: Twice a Month Documentation: Self Declaratic

IncomeSource: Temporary Assistance for Needy Families (TA

**Non-Cash Benefits**

None  Client Doesn't Know  Client Refused  Data Not Collected

Food Stamps (CalFresh)  CalWorks Child Care  Temporary Rental Assistance

Amount: \$0.00  CalWorks Transportation  Section 8 or Rental Assistance

WIC  Other CalWorks-Funded Services  Other:

No Health Insurance  Client Doesn't Know  Client Refused  Data Not Collected

Medi-Cal  MEDICARE  State Children's Health  VA Medical Services  Indian Health Services Program

Employer Provided  COBRA  Private Health Insurance  State Adult Health  Other:

# Exit Tab

1. Click on the **Exit** tab.
2. Enter the client's **Exit Date**.
3. The upper grid populates when the **Exit Date** has been entered, and lists any services that occur after the **Exit Date**. These service will be deleted when the client is exited.
4. The bottom grid shows the most recent services provided to the client.
5. Click on **Exit Customer(s)**.

The screenshot shows a web application interface with several tabs: 'Exit Program', 'Exit Questions', 'SnapshotManagement', 'Exit', and 'Followup'. The 'Exit' tab is selected and highlighted with a red box and a yellow callout '1'. Below the tabs is a green warning banner that reads: 'If you select exit program, all enrollment information for this period will be locked. No additional changes will be allowed.' Below the banner is a form with an 'Exit date' field containing '11/15/2016', highlighted with a red box and a yellow callout '2'. To the right of the date field is a yellow callout '5' and a button labeled 'Exit Customer(s)', also highlighted with a red box. Below the form are two data grids. The top grid is empty and has a yellow callout '3' in its center. The bottom grid contains data and has a yellow callout '4' in its center. Both grids have headers with columns: 'FirstName', 'LastName', 'StartDate', 'DateEnded', 'Activity', 'ActivityType', and 'ActivityDetailsNumber'.

# Followup Tab

The **Followup** tab is optional, and allows users to track any follow-ups that are completed for the client after the client exits the project. The questions on this tab can be customized by project.

1. Click on **Followup** tab.
2. Click on **New**, and enter the required information. In the **Activity** dropdown, select Follow-up to answer the standard follow-up questions in Orange County.
3. Click on **Save**.
4. Answer the questions, and click on **Save Answers**. All required questions will be in red text.



# Questions?

Contact your Agency Administrator.