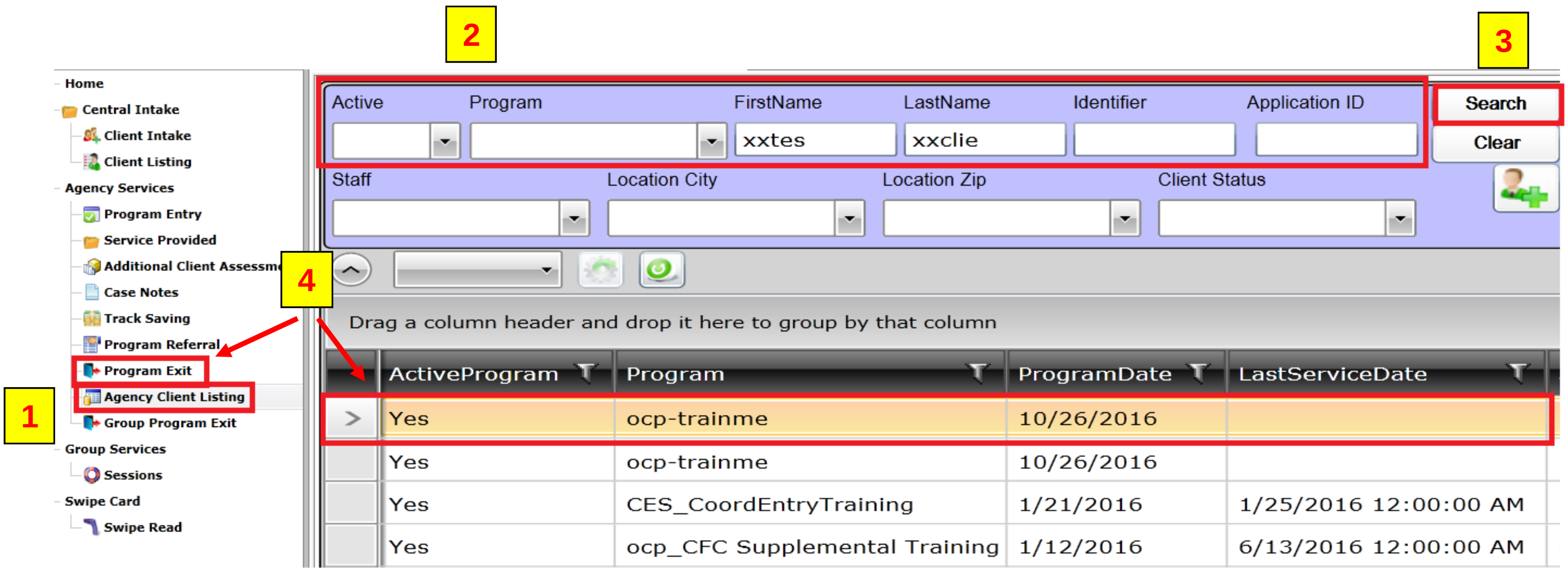
Mini Guide: Program Exit Page

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.

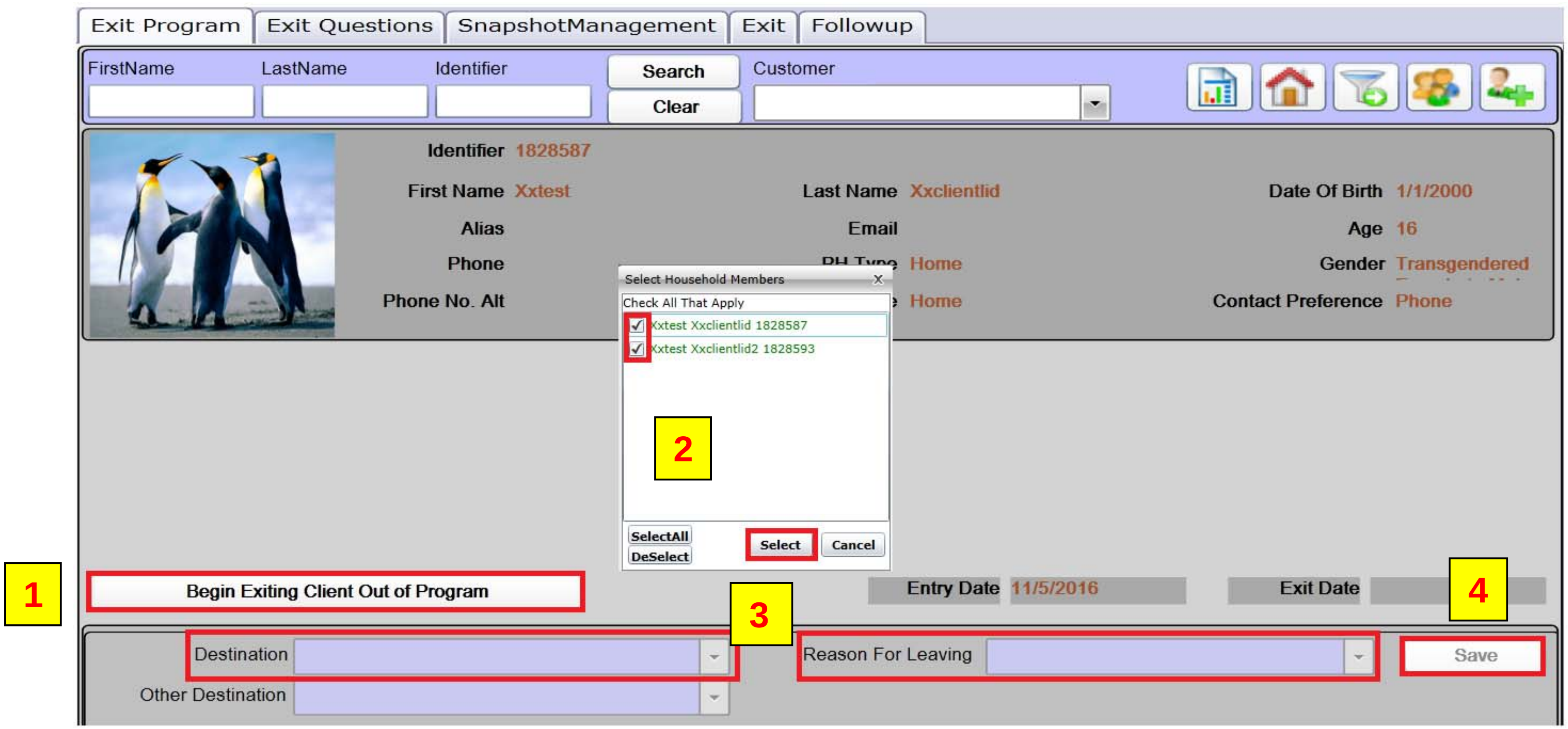


Exit Program Tab

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**.

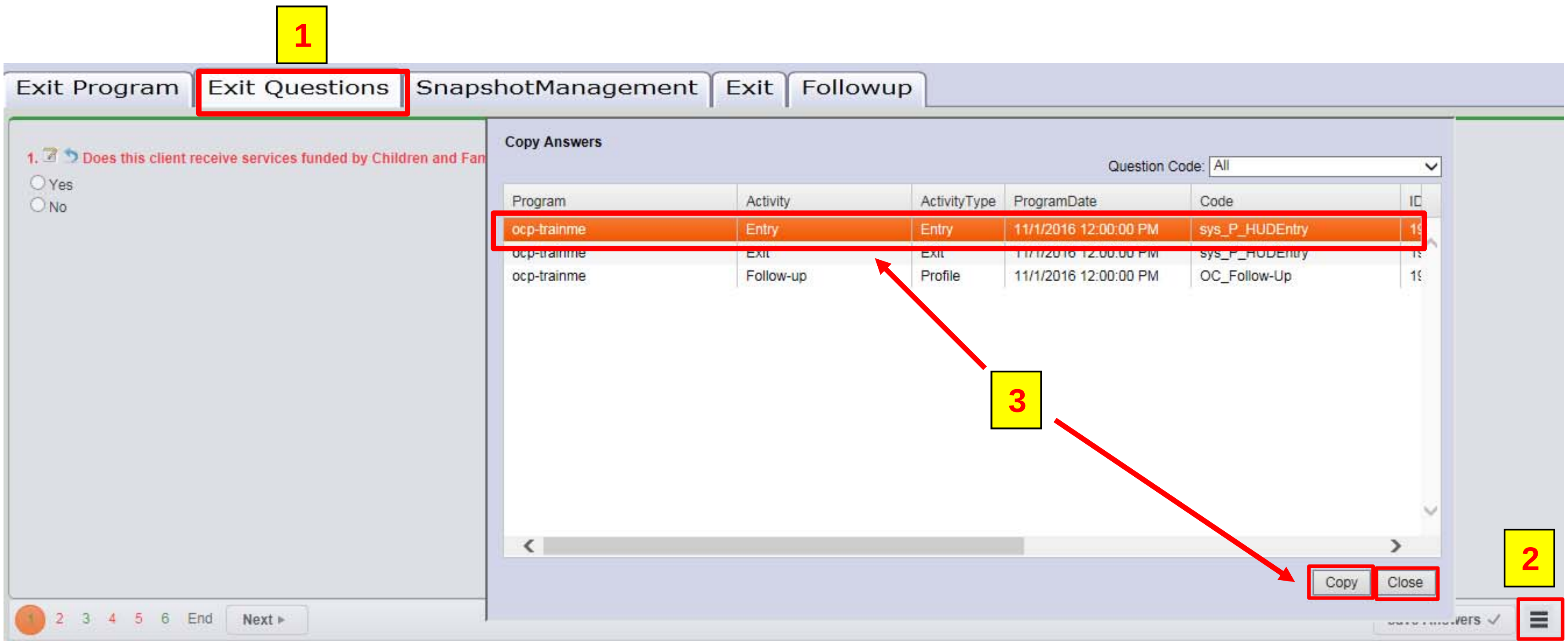
**A snapshot will automatically be created.*

***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.*



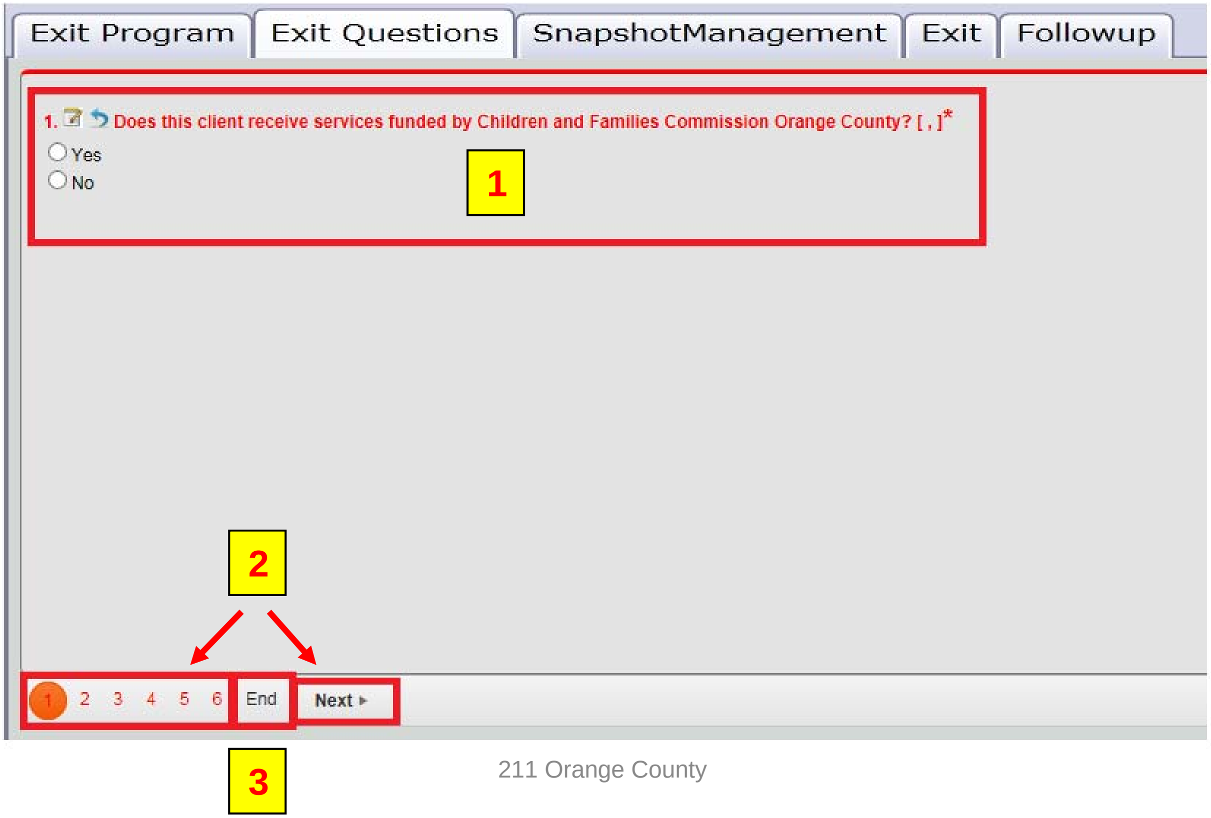
Exit Questions Tab

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.



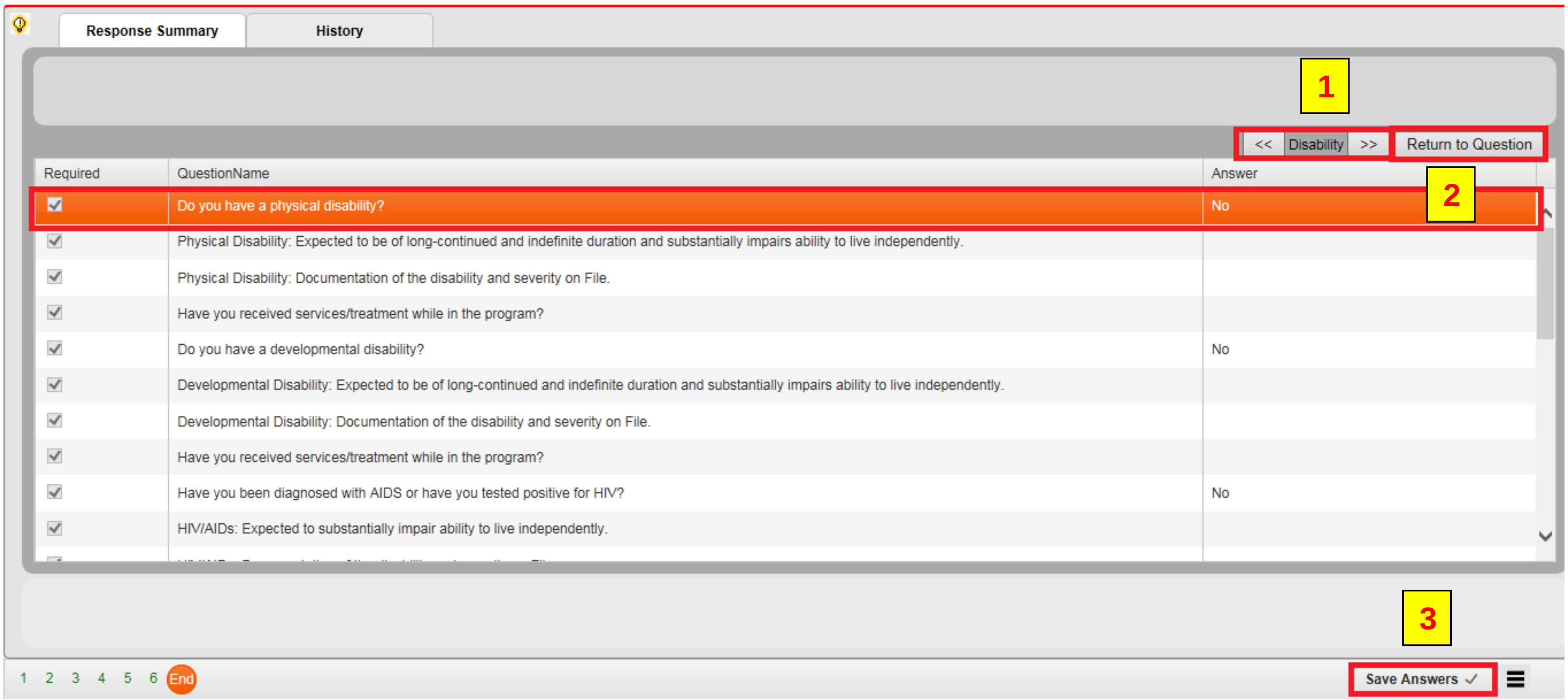
Exit Questions Tab

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.



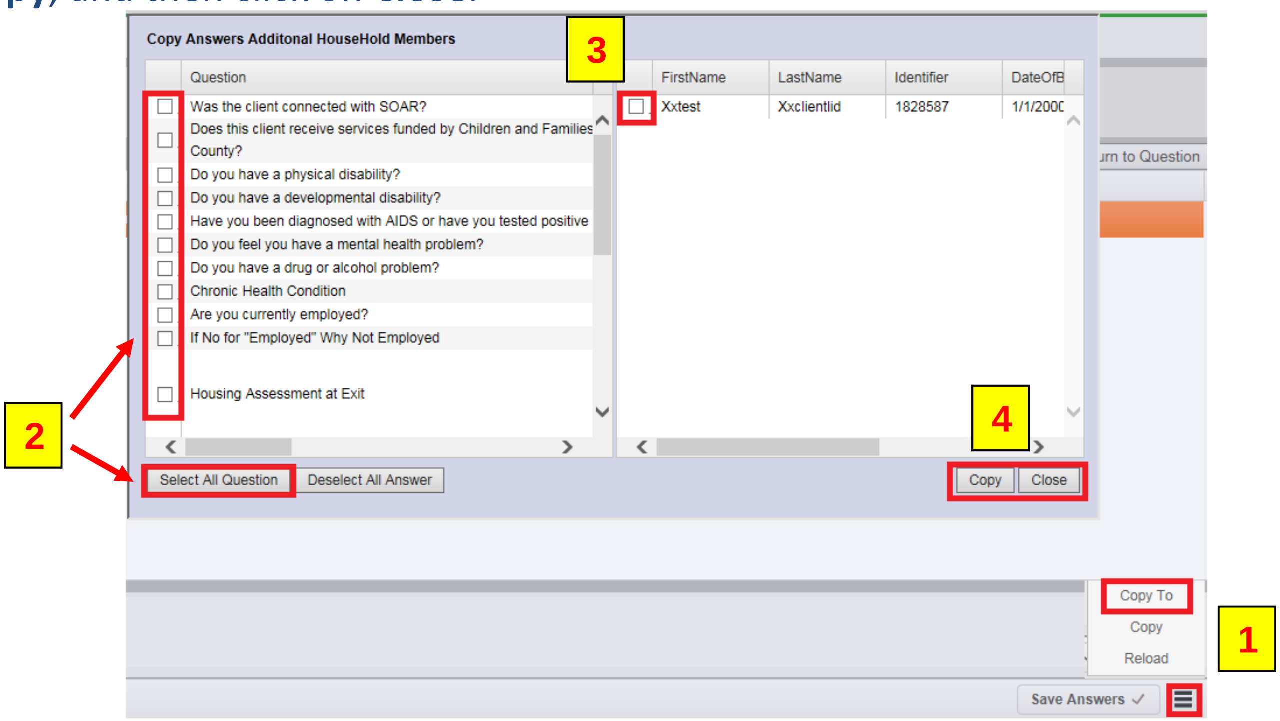
Exit Questions Tab (continued)

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.



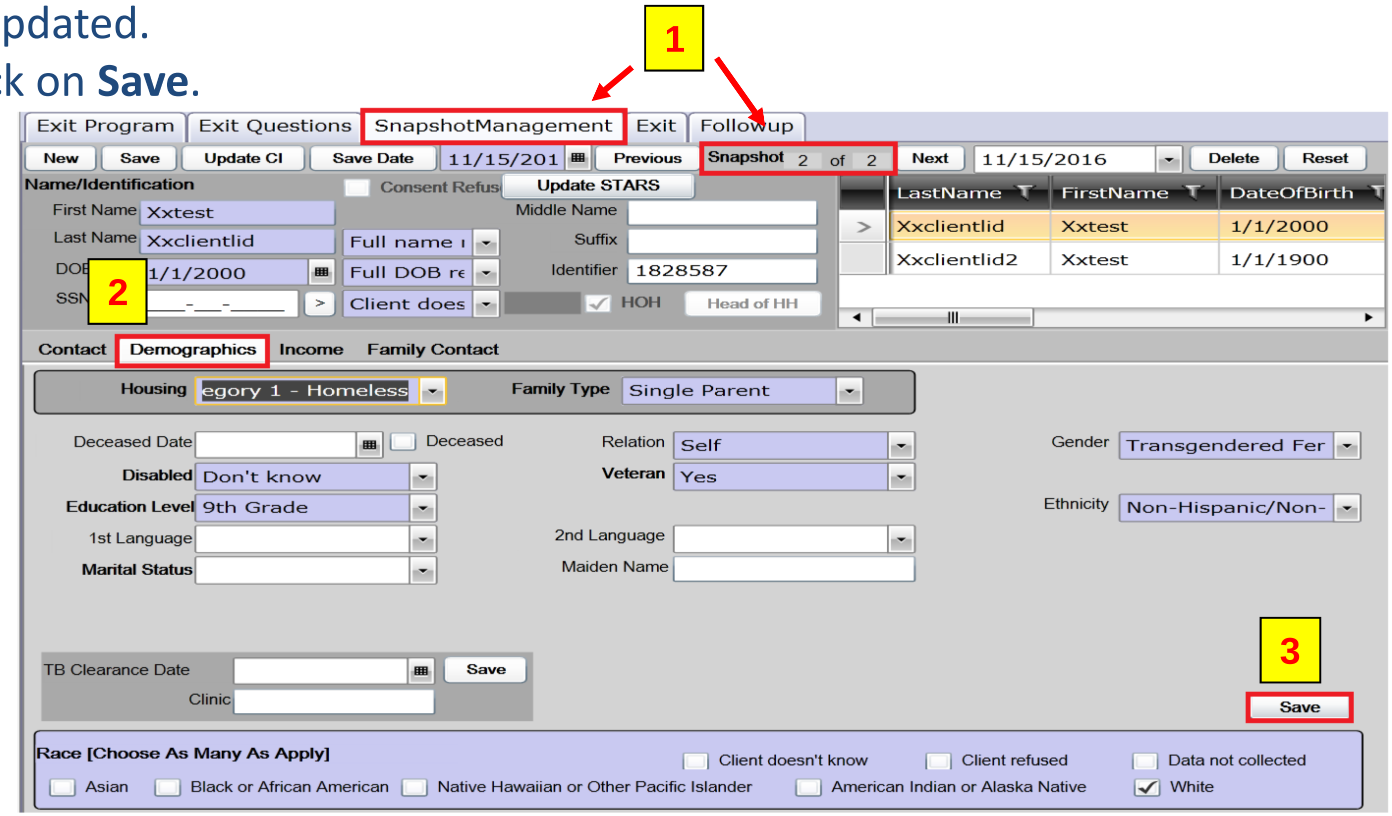
Copying Questions to Other Household Members

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**.



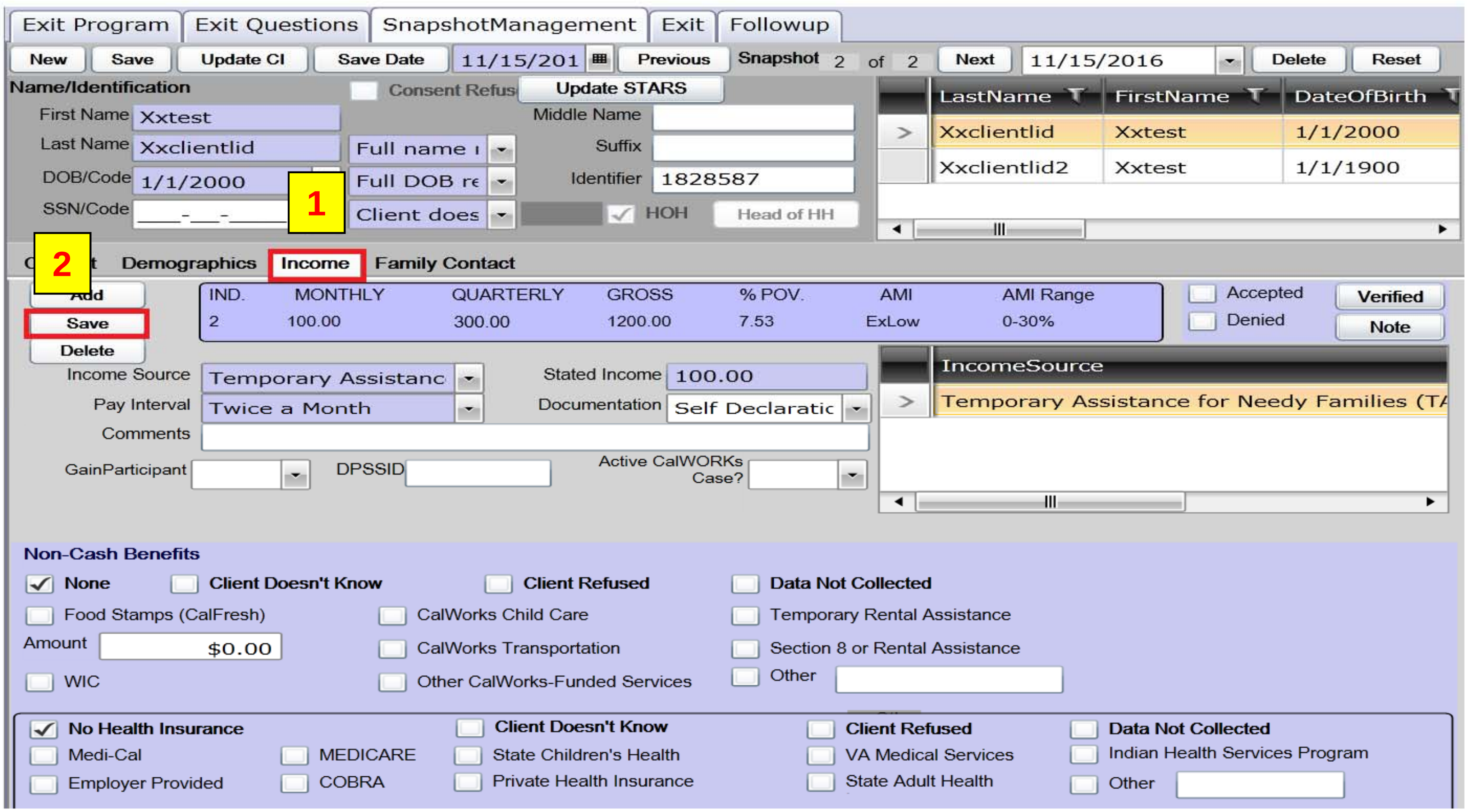
Snapshot Management Tab

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**.



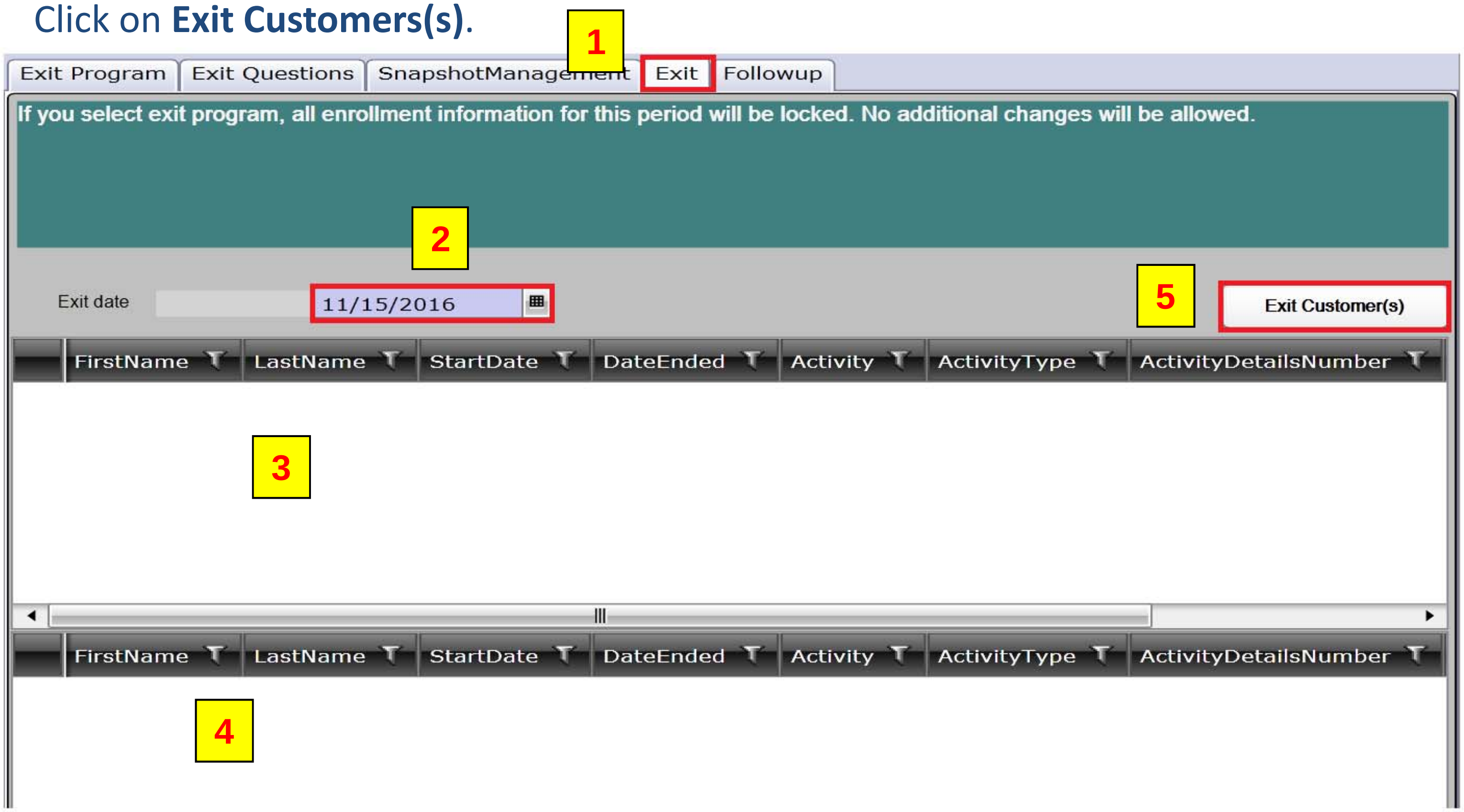
Snapshot Management Tab (continued)

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 Tab

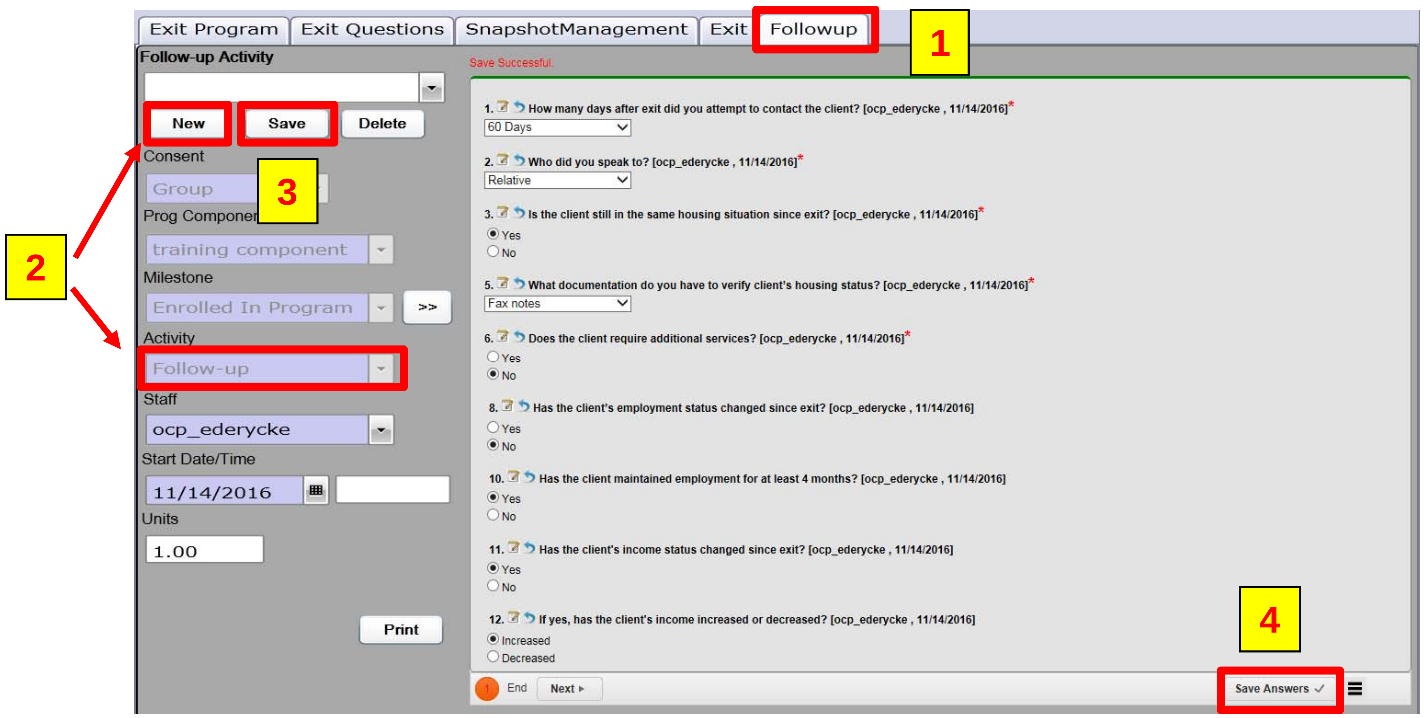
1. Click on the **Exit** tab.
2. Enter the client's **Exit Date.**
3. The upper grid populates when the **Exit Date** has been entered, and lists any services that occur after the **Exit Date**. These service will be deleted when the client is exited.
4. The bottom grid shows the most recent services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



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.