HMIS Data Element Cheat Sheet: Exiting, Annual and Status Assessments

Exiting the Client

When a client is exited from a project there are certain data elements that must be captured during the exit interview.

Data Element: 3.11 Project Exit Date

Helps to determine how long a client was served by an agency (time spent in project). This varies by project type.

- **Non-Residential Projects:** The exit date would be the last day a contact was made, or a service was provided, for example:
  - *A street outreach client who has lost touch with their case manager will have their exit date reflect the last time they had contact with their case manager.*
- **Site-based Residential Projects:** The last day of their continuous stay in the project, before they were moved to another residential project/ stops residing in the project.
- **Tenant-based Permanent Housing Projects:** The last day the client receives rental assistance OR supportive services, such as case management.
  - *If a client, who is receiving RRH, is still getting case management services after they have finished getting rental assistance then that client will not be exited until the case management services also end.*

Ask things like...

- (Non-Residential Projects):
  - When was the last time the client and worker spoke?
  - When did the client last get any services?
- (Site-based Residential Projects):
  - What day did the client last stay in the project?
  - Did the client move to another unit or did they leave the project entirely?
- (Tenant-based Permanent Housing Project):
  - Is the client still getting any services?

Data Element: 3.12 Destination

Helps identify where a client will be right after they leave the project.

Recording Data in HMIS

- Selecting **Other** as a destination will negatively impact data quality because we are unable to determine where the client is going after they leave a project. If a client's destination cannot be classified under any of the Destination options then and only then select Other and submit a ticket to the HMIS Help desk for further guidance.

Examples of Destination Exits:

- *A student exiting a project and moving into university housing should have their destination be* ***Rental by client, no ongoing housing subsidy****.*
- *A CES client that gets matched to a HCV voucher, but is not housed yet. Since the client must be removed from the project, despite still being homeless they must be exited as* ***Rental by client with Housing Choice Voucher (HCV) (tenant or project based).***
- *A household that moves out of the county and are staying in their car should be exited by the project as* ***Place not meant for habitation.***
- *If a client is staying with their friends or family, but was not given a time constraint as to when they had to leave, or if at all, then they should be exited as* ***Staying or living with family, permanent tenure.***
- *If a client names another project (i.e. the Armory), find out the name of the agency and contact them to determine the project type, or enter a ticket with the HMIS Help Desk for assistance.*

Status Updates and Annual Assessments

When clients stay with a project, there might be events that occur while they are enrolled that should be captured in HMIS. Additionally, when clients stay in a program for at least one year, it is important that those changes the client experiences get captured in reports so that they reflect the most accurate information.

Status Updates

As clients receive services, they might experience some changes that could affect their disability status, income, or household makeup.

For Example:

- A client's child turns 18, and the HoH's benefits were affected because they are no longer able to claim them, then a client's **Non-Cash Benefit** record should be updated to reflect this.
- A client was recently diagnosed with HIV, in this case the **HIV-AIDS** record and the **Disabling Condition** record should be updated.
- If a client was able to get CalFresh benefits, and is expected to continue to receive them then their **Non-Cash Benefits** record should be updated to reflect this.

Annual Assessment

The purpose of completing this assessment is ensure that the current data that is recorded for the clients is as accurate as possible.

Individuals:

- Conduct an *Annual Assessment* 30 days before or after the client's one year anniversary of their **Project Start Date.**
  - *If a client enters your project on January 1st, 2019 and they are still enrolled as of January 1st, 2020, then their Annual Assessment can be recorded no sooner than December 2nd 2019, but no later than January 31st, 2020.*

Group/ Families:

- *Annual Assessments* are based around the **Project Start Date** for the HoH. So based on when the HoH started all other members will need to have their *Annual Assessment* done too.
  - *If the HoH started on January 1st, 2019 and was later joined by additional members on December 30th, 2019- then all of the new members will need to have their Annual Assessment done because their new HoH's* ***Project Start Date*** *anniversary is coming up.*