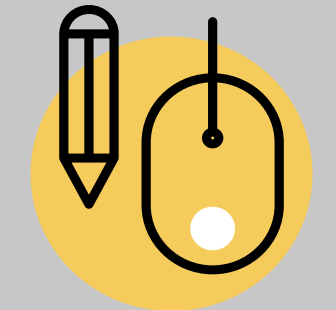




EXITING CLIENTS from PROGRAM

This guide will provide you with steps in exiting clients from a Program, updating HoH and removing an exited client from Global Head of Household



Have Questions or Need Assistance please contact the HelpDesk or email sccsupport@bitfocus.com
Need Assistance?

Exiting a Client(s) from Program

Updating HoH After Exiting Client

Step 1

Log into HMIS and search for the client(s) that needs to be exited from a program

CLARITY HUMAN SERVICES
Username
Password
SIGN IN
FORGOT PASSWORD?

Housing Test Agency
SEARCH FOR A CLIENT
SEARCH
Starke Teen Train
Robin Train
Sally Springs
Jose Acosta Suenita
Aureliano Suenita

Step 2

Once you have searched and found your client, from the tabs select **PROGRAMS**

Search for the **Program Name** you want to **EXIT** your client from and then select the program using the edit option (small pen icon over "paper") that will appear to the left when you hover with your mouse

Thulsa Doom
PROFILE HISTORY SERVICES PROGRAMS FILES NOTES ASSESSMENTS LOCATION REFERRALS
PROGRAM HISTORY
Program Name Start Date End Date Type
Homeless Prevention Program 03/08/2019 Active Individual
SDC Homeless Prevention 02/28/2019 Active Individual
SDC HP Program 2 02/28/2019 Active Individual
Emergency Shelter Program 01/02/2019 02/01/2019 Group
Shelter from the Cold Agency for test housing services Name of Program that client will be exited from 11/22/2018 Active Group

Step 4

Once you have exited a client from program that was HoH (steps 1-3) you will want to update or designate the **NEW** HoH for the remaining household members-as you can see in the EXIT screen to the right Thulsa Doom is listed as HoH-since she has exited the program this no longer is an accurate reflection of this household and will need to be updated

Please note that if you exit a single client you will not need to follow these steps; only do this when it is a household with more than one family member (and the exiting client was HoH)

0 DAYS INACTIVE PROGRAM
Program Type: Group (2)
Program Start Date: 11/22/2018
Program End Date: 04/01/2019
Assigned Staff: Lesly Soto
Head of Household: Thulsa Doom

Step 3

Once you identify the Program you will be exiting the client from, select the **EXIT** option that is located to the far right of the screen-this will open up another screen which will allow you to enter the **EXIT** date from the program

Please note that for households there will be the option(switch on the toggle for each client exiting)-to exit all household members or just the client who is exiting-in this example I am only exiting Thulsa Doom

Be sure to enter the date client is **EXITING** the program and complete filling in any remaining questions-when done select **SAVE & CLOSE**-you have now exited the client from program

Note that to the right of the screen you will see the client has been exited-the screen will display the program Start Date and the Program End Date

If the client exited was HoH you will want to go back and update the new HoH-see steps on the right hand column of this document

Thulsa Doom
PROFILE HISTORY SERVICES PROGRAMS FILES NOTES ASSESSMENTS LOCATION REFERRALS
PROGRAM: SHELTER FROM THE COLD
Enrollment History Provide Services Forms
Exit

SELECT CLIENTS TO EXIT FROM PROGRAM
Thulsa Doom Aunt
Jane Plain Niece
END PROGRAM

End Program for client Thulsa Doom
Program Exit Date: 04/01/2019
Housing Status at Exit: Category 1 - Homeless
Reason For Leaving: Left for a housing opportunity before completing program
Destination: Rental by client, no ongoing housing subsidy

0 DAYS INACTIVE PROGRAM
Program Type: Group (2)
Program Start Date: 11/22/2018
Program End Date: 04/01/2019
Assigned Staff: Lesly Soto
Head of Household: Thulsa Doom

Step 5

In the section directly below the EXIT screen locate the section that reads **PROGRAM GROUP MEMBERS**-this will list the remaining household members associated with the client just exited-select from this list the client that will be designated **NEW HoH** by hovering over the right side of their name with your mouse and select the edit icon

Please note this client should still be **ACTIVE** and not have an Exit Date

Upon selecting the edit icon you are redirected to the client (e.g., Jane Plain)-but you will not be exiting her from program, instead you will update client as the new HoH

Please note you cannot update the HOH in an exited client, which is why this step of designating a new HoH is needed

Where it reads Head of Household "Thulsa Doom" select the edit icon-this will give you a new pop-up window

This brings you to the **CHANGE HEAD OF HOUSEHOLD** option, please note the selected client is the correct one and proceed to change using the drop down option to **Self (head of household)** and update the relationship to the previous HoH as necessary (be sure to update any other group members relationship to the new HoH as well)-in this case Head of Household's Other Relation Member

SAVE CHANGES when done-you have now updated the new HoH

Program Group Members
Jane Plain 04/01/19 Active

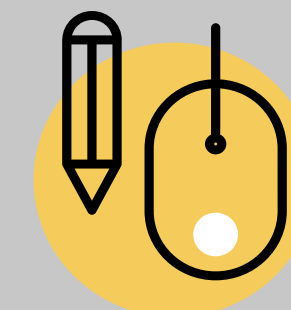
0 DAYS ACTIVE PROGRAM
Program Type: Group (2)
Program Start Date: 04/01/2019
Assigned Staff: Lesly Soto
Head of Household: Thulsa Doom

CHANGE HEAD OF HOUSEHOLD
Jane Plain Self (head of household)
Thulsa Doom Head of household's o
SAVE CHANGES CANCEL



EXITING CLIENTS from PROGRAM

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Removing a Client from Global Household

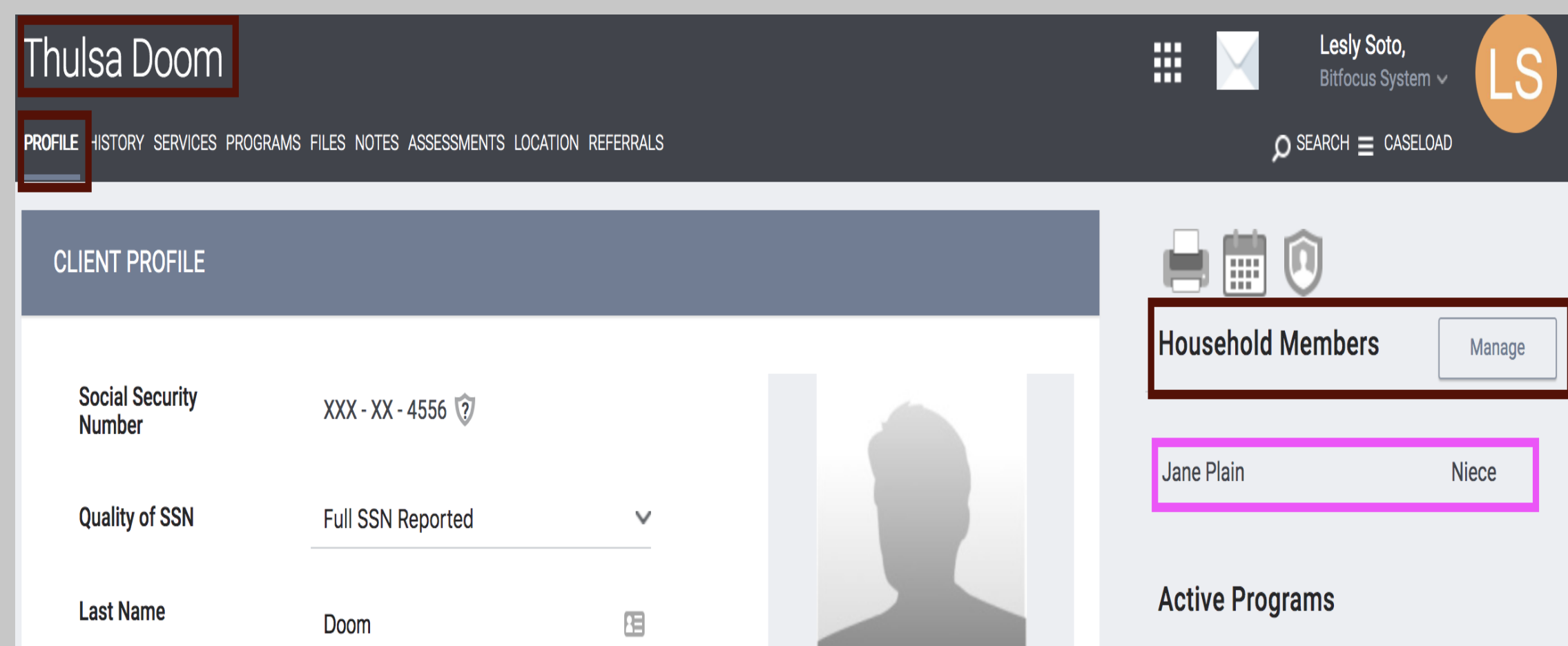
Once a client has been exited from a program and the HoH has been updated to reflect the NEW HoH (if necessary) the final step in household configuration is removing the exited client from the Global Household (or what is called Household Management in HMIS).

Please note that if a client is a single adult these steps are not required since the client was entered as an **INDIVIDUAL** and not as part of a **GROUP**.

To remove the client exited from the Global Household return to the exited clients profile (you do this by returning to the search screen in HMIS)

On the right hand side of the screen you will see **Household Members** and a **MANAGE** button next to it as well as the household members listed directly below it (e.g., Jane Plain)

Step 6

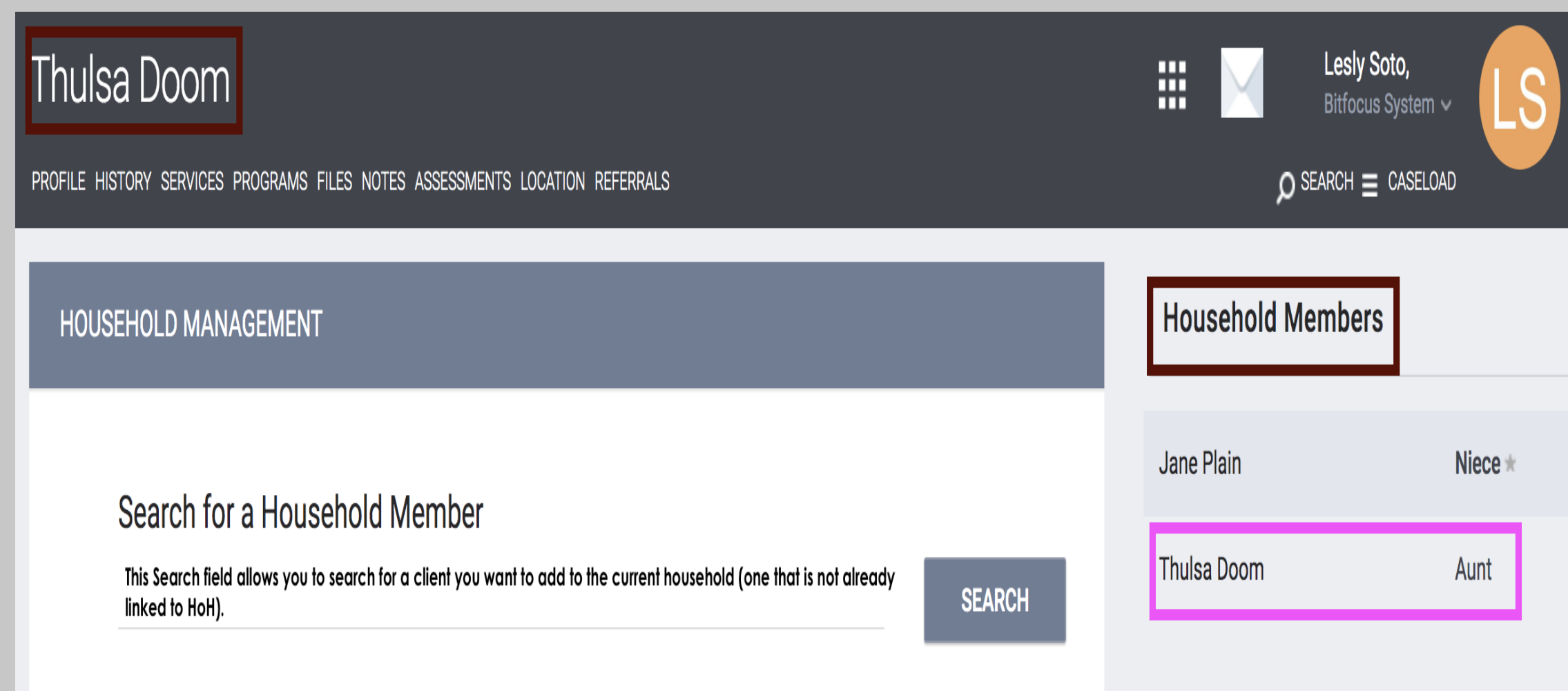


Select the **MANAGE** button-this will take you to a different screen entitled-**HOUSEHOLD MANAGEMENT**

On this screen you will be able to remove the client from the Global Household-note that you want to select the client who was exited since this will be the client that will be removed from the Global Household

Select the edit icon located to the right of the clients name-this will open up a another screen

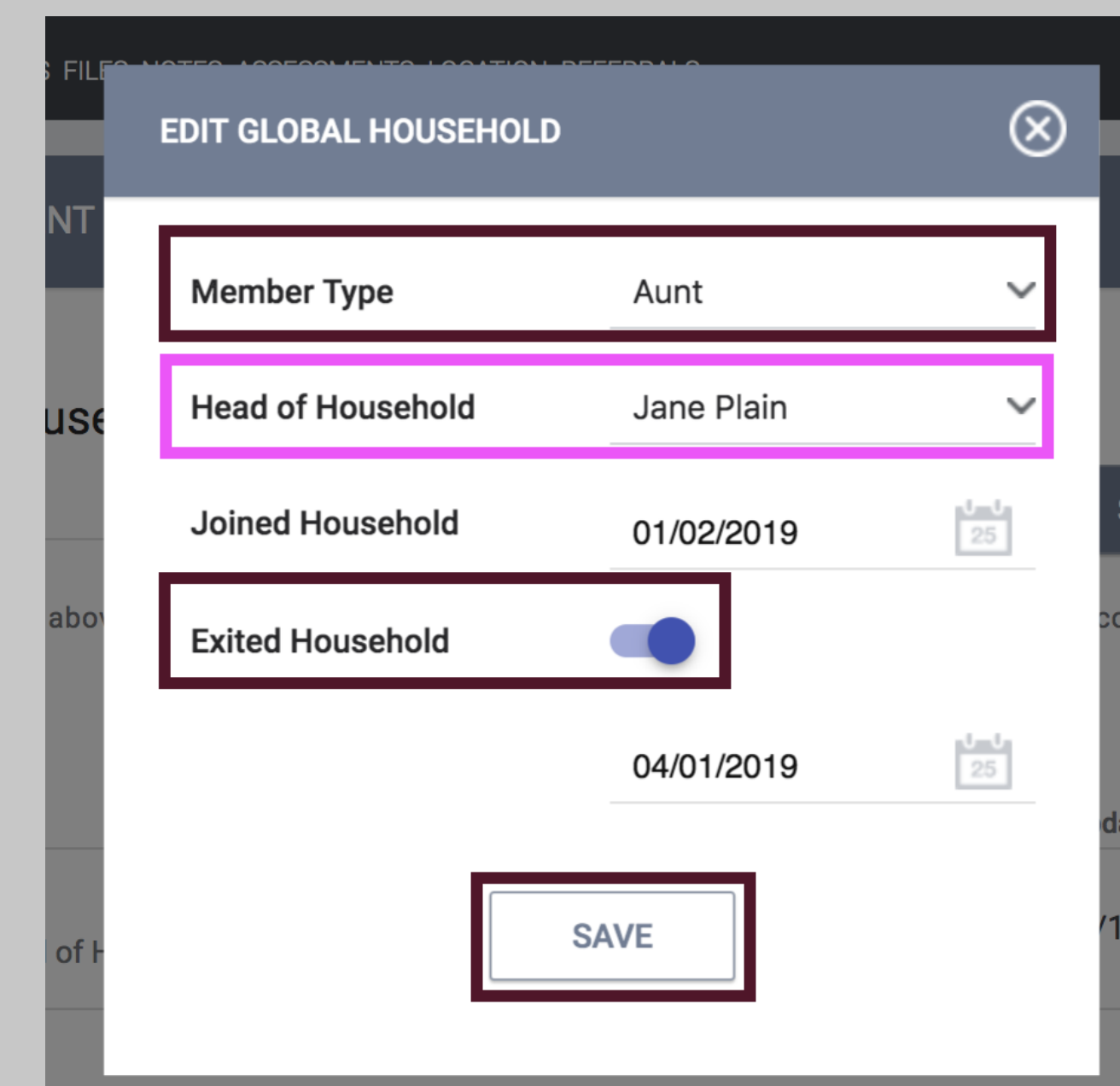
Step 7



Step 8

From the EDIT GLOBAL HOUSEHOLD screen you will see the following fields:

1. **Member Type** that you will exit from household (should be the exited client)
2. **HoH** (in this case the remaining household member that was changed in previous steps)
3. **Exited Household toggle**, which you will toggle on by selecting it with your mouse to confirm this client is exiting the household (toggle will turn blue to indicate it is selected)
4. **The date of the exit** (it will auto populate to current date but you can enter the appropriate date if it is different)
5. **SAVE** button which you will need to select to save the changes to the Global Household



Once you have completed making all of the selections to exit the client from the Global Household you can return to the **SEARCH** screen and pull the client to confirm all changes are correct

Under the Household Members there should be no **ACTIVE MEMBERS** listed

You have now completed exiting a client from Global Household

Step 9

