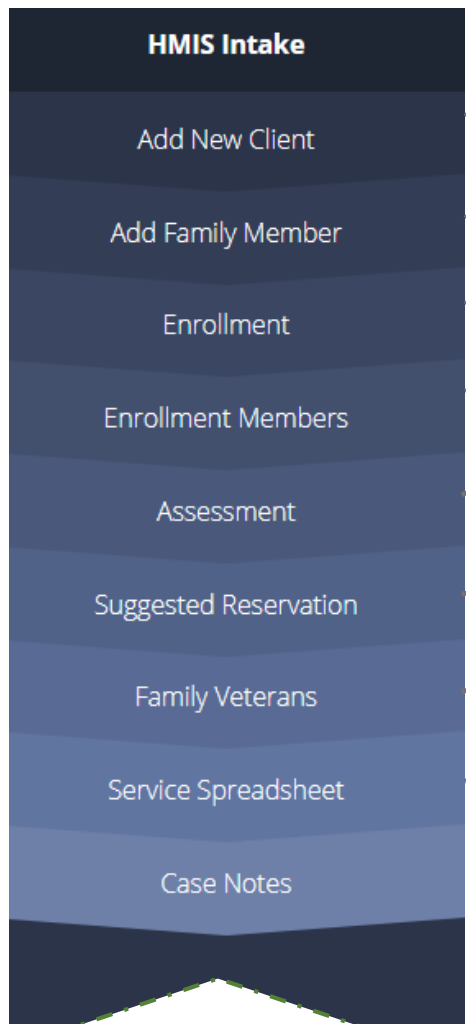
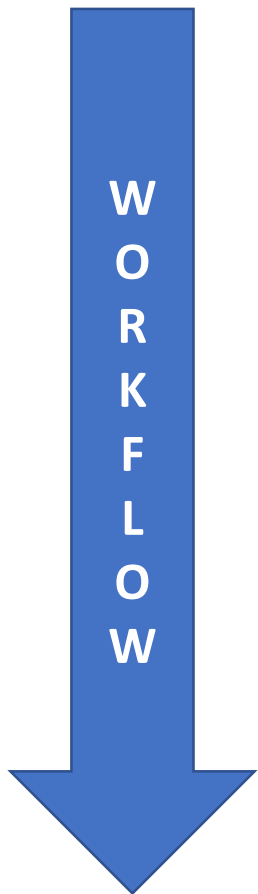
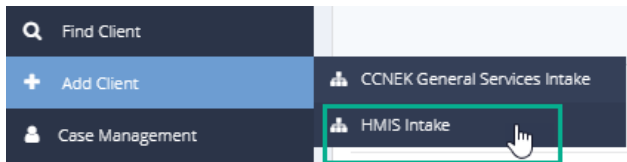


HMIS Intake Workflow Quick Reference

Workflows carry users through specific process steps by automating the progression of work.



Be sure to check if the client already exists in system **Check for Duplicates**. **Only** select **This is a new client** if the client **does not** have a record in HMIS.

Add Family Members. If no additional family members, simply click **Save**

Be sure to change dates, as needed, as the default is set to current day

Select **which** family members you want **enrolled** in this program and **Save**, otherwise, simply click **Save**

Complete all required Assessments for selected Program.

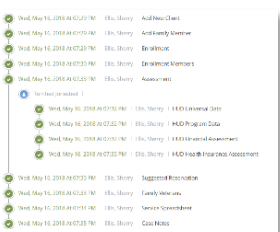
If no Reservations needed, simply click **Done**

If no Family Veterans, simply click **Done**

Select your Project and **Search** to add Services as needed, when finished click **Save**

Add Case Notes as needed when finished click **Done**

Once the workflow has completed you will get a summary screen. Congratulations!



Other

- System is processing
- Required Field
- Allows access to more options