

QRG – Exit program using workflow

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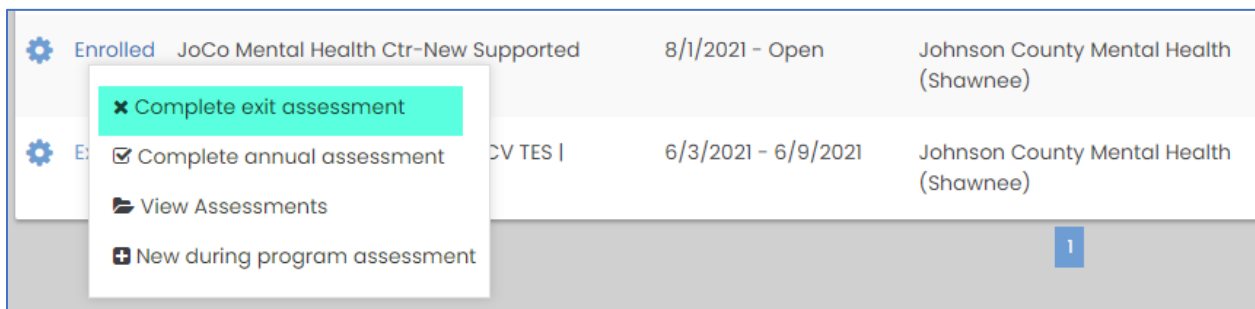
WHAT IS A QRG – QRG stands for **Quick Reference Guide**. Quick Reference Guides are short 1-8 page documents that provide concise practical information and advice on specific topics. Sometimes known as “cheat sheets” quick reference guides are designed for users who know the material or task but need something in front of them to remind them of the steps.

WHO THIS GUIDE IS FOR – For end users to exit the client/household from a program by using the exit assessment workflow. End users need to review data fields when copying assessments and check their work after the workflow is finished.

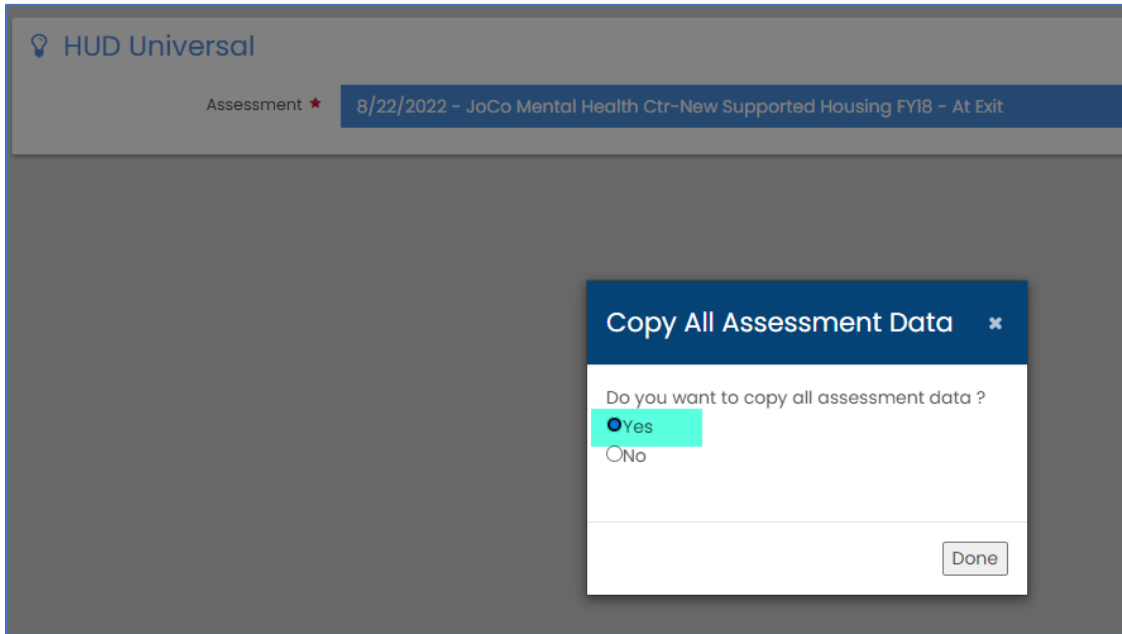
STEPS TO EXIT CLIENT

STEP 1

Case Management > Project Enrollment > Click on **Enrolled Status** > Select **Complete exit assessment** to launch workflow



Continue with the QRG if you selected Yes to copy all assessment data.



Click **Done** and move on to **Step 2**.

STEP 2

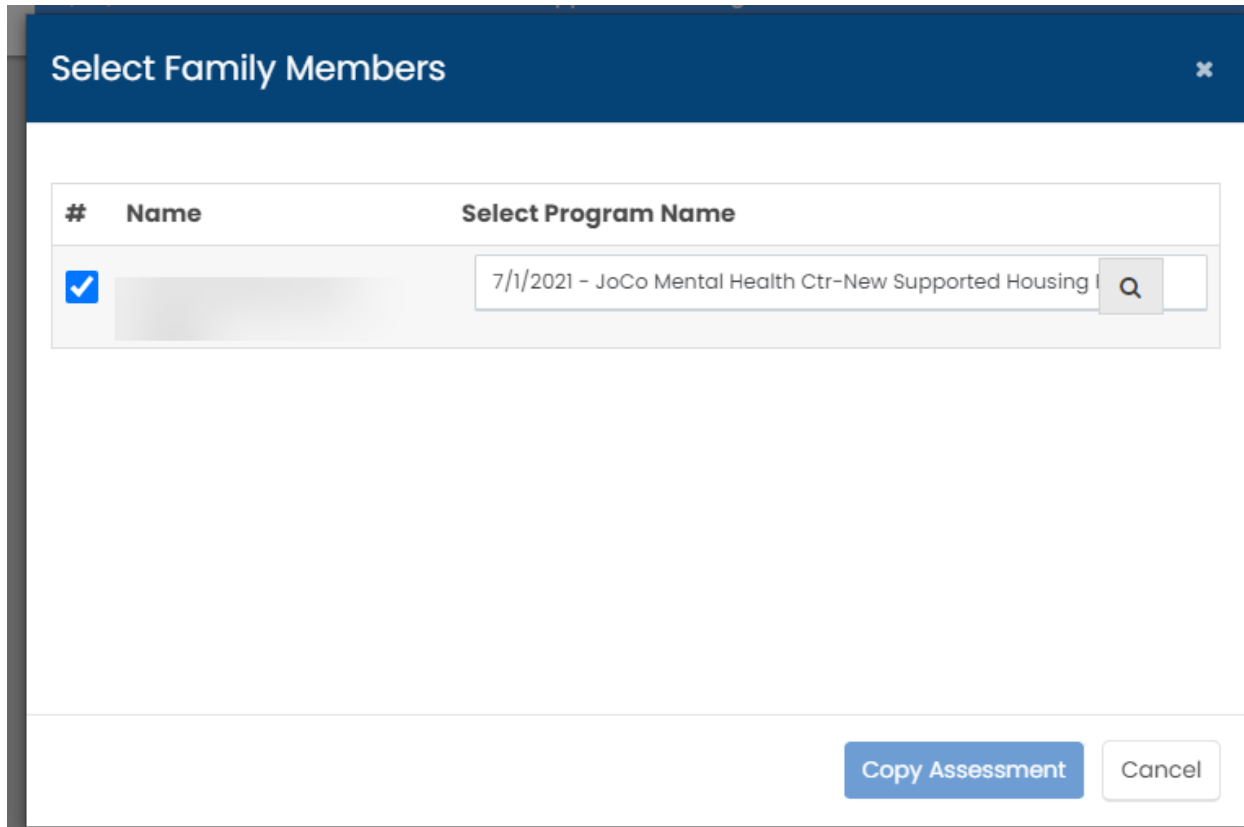
Using the radio button, select the client’s entry assessment or the most recent assessment in HMIS. Click **Select** when you’re done.

Copy Assessments
✕

Date	Program Name	Type
<input type="radio"/> 2/9/2021	CCNEK - Case Management	At Entry
<input type="radio"/> 6/2/2021	JoCo Mental Health Ctr - ESG-CV RRH	At Entry
<input type="radio"/> 12/31/2021	JoCo Mental Health Ctr - ESG-CV RRH	At Exit
<input type="radio"/> 5/13/2021	JoCo Mental Health Ctr - ESG-CV TES	At Entry
<input type="radio"/> 6/9/2021	JoCo Mental Health Ctr - ESG-CV TES	At Exit
<input type="radio"/> 5/13/2021	JoCo Mental Health Ctr.-ESG-Street Outreach	At Entry
<input type="radio"/> 8/1/2021	JoCo Mental Health Ctr.-ESG-Street Outreach	At Exit
<input checked="" type="radio"/> 7/1/2021	JoCo Mental Health Ctr-New Supported Housing FY18	At Entry
<input type="radio"/> 5/12/2021	SalArmy - JoCo Shelter Voucher Program	At Entry
<input type="radio"/> 6/2/2021	SalArmy - JoCo Shelter Voucher Program	At Exit

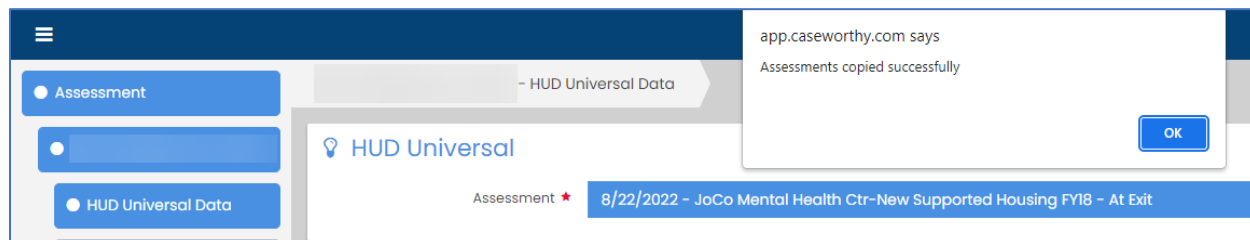
STEP 3

The assessment you selected now appears in a new window and you can click on **Copy Assessment**.



STEP 4

A pop up notifies you that the assessment was successfully copied. Click **OK** and start navigating through the workflow.



STEP 5

Review each data field before saving and moving on to the next assessment in the workflow. **Do not** exit the workflow without entering data or else the required fields will be blank and cause data quality issues. (Notice how the fields below are blank and need data entered).

HUD Program Data

Assessment * 8/22/2022 - JoCo Mental Health Ctr-New Supported Housing FY18 - At Exit

Destination Type *

Non-Cash Benefits from Any Source

Non Cash Benefit * No

Health Insurance

Covered by Health Insurance * No

General Health Status

General Health Status *

Well Being

Client perceives their life has value and worth. *

Client perceives they have support from others who will listen to problems. *

Client perceives they have a tendency to bounce back after hard times. *

Client's frequency of feeling nervous, tense, worried, frustrated or afraid. *

Save Cancel

STEP 6

Enter the **End Date** and **Save**.

The screenshot shows the 'Exit Enrollment' form. On the left is a sidebar with navigation options: Assessment, HUD Universal Data, HUD Program Data, HUD Financial Assessment, HUD Health Insurance As., and Exit Enrollment (selected). The main form area contains the following fields: Family (text input), Enrollment Status (dropdown menu showing 'Exited'), Program Name (text input with 'JoCo Mental Health Ctr-New Supported Housing FY18'), Organization (text input with 'Johnson County Mental Health Center'), Begin Date (calendar icon and text '08/01/2021'), End Date (calendar icon and text '08/22/2022'), and Exit Case Assignment (checkbox). At the bottom right, there are 'Save' and 'Cancel' buttons.

STEP 7

Workflow notifies you that it is complete. Click **Done** to close the window.

The screenshot shows the workflow completion screen. At the top, it says 'Workflow is now complete.' Below this is a vertical timeline of steps, each with a checkmark icon: 'Mon, Aug 22, 2022 At 10:31 AM | Ruiz, Hannoyd | Assessment', 'Mon, Aug 22, 2022 At 10:30 AM | Ruiz, Hannoyd | HUD Universal Data', 'Mon, Aug 22, 2022 At 10:30 AM | Ruiz, Hannoyd | HUD Program Data', 'Mon, Aug 22, 2022 At 10:30 AM | Ruiz, Hannoyd | HUD Financial Assessment', 'Mon, Aug 22, 2022 At 10:30 AM | Ruiz, Hannoyd | HUD Health Insurance Assessment', and 'Mon, Aug 22, 2022 At 10:31 AM | Ruiz, Hannoyd | Exit Enrollment'. At the bottom right, there is a 'Done' button.

STEP 8

Review your data entry by going to *Case Management > Project Enrollment > View Assessments*

	Exited	JoCo Mental Health Ctr-New Supported	8/1/2021 - 8/22/2022	Johnson County Mental Health (Shawnee)
	Exited	h Ctr - ESG-CV TES	6/3/2021 - 6/9/2021	Johnson County Mental Health (Shawnee)

STEP 9

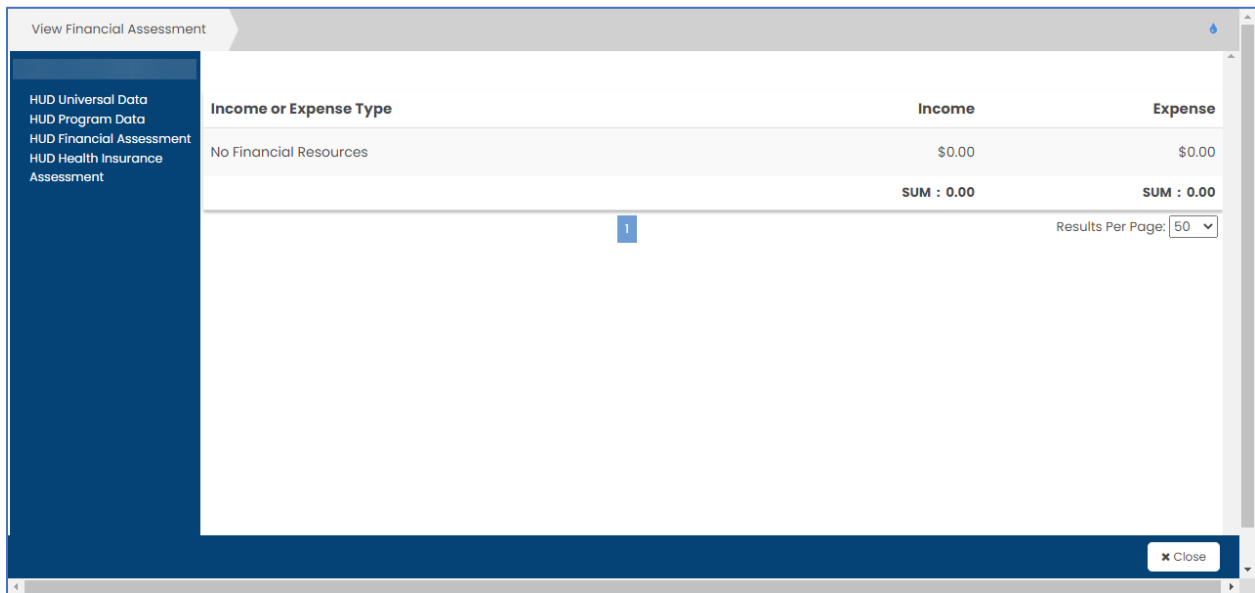
Click on the assessment you want to review.

Assessments ✕

Event	Member	Date
At Entry		07/01/2021
At Exit		08/22/2022

STEP 10

Click on the different assessments to view data and **Close** when you're finished.



Income or Expense Type	Income	Expense
No Financial Resources	\$0.00	\$0.00
SUM : 0.00	SUM : 0.00	SUM : 0.00

Results Per Page: 50

Close

Please visit QRGs on Data Quality for assistance on editing assessment data:
<http://www.kcmetrohmis.org/qrg.htm> or email the HelpDesk at hmishelpdesk@marc.org