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# HMIS Support Manual - Client Exit User Manual

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**Summit County, Ohio  
Homeless Management Information System**



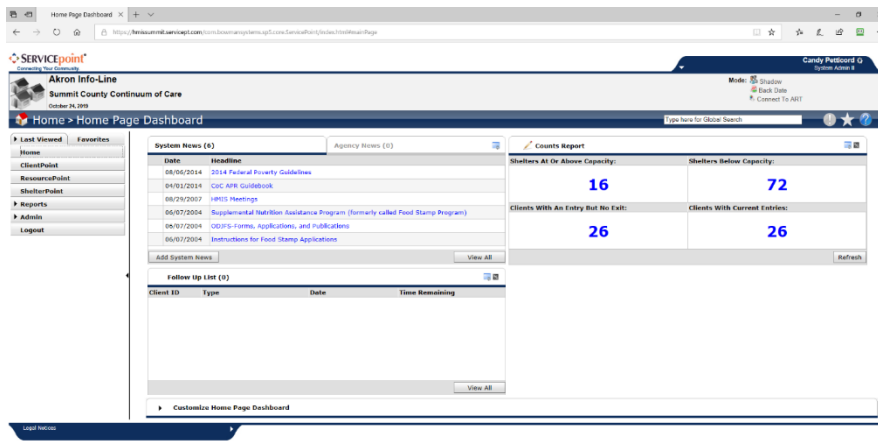
Welcome to the UWSC’s HMIS Central Intake (CI) Client Exit User Manual.

Let’s Begin:

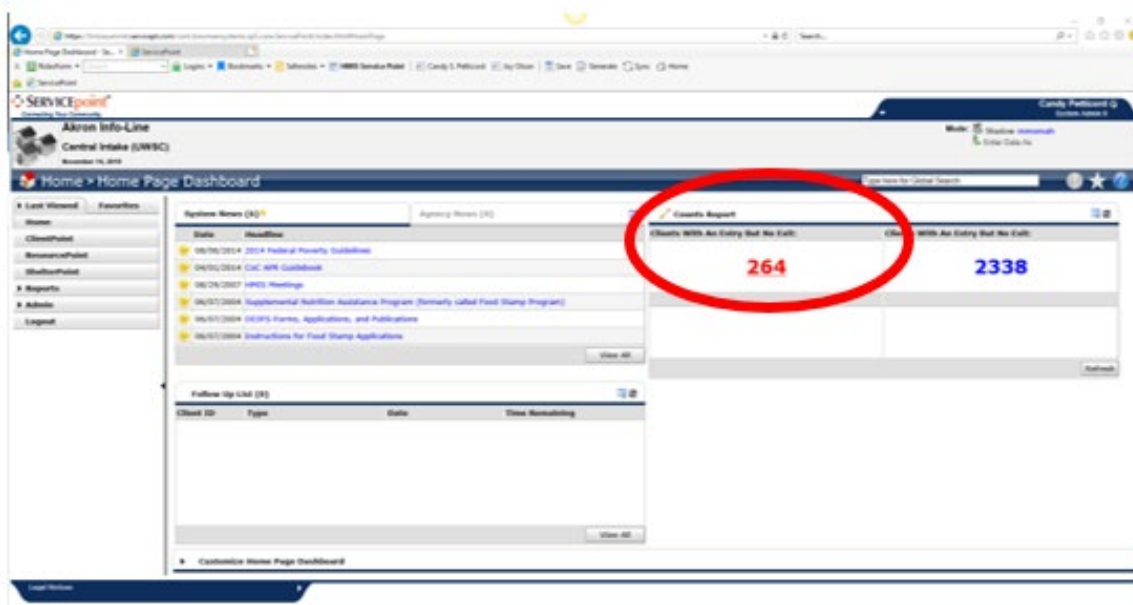
We begin by navigating to the Servicepoint website: <https://hmisummit.servicept.com/>.

Once logged in, you will arrive at the **Home Page Dashboard**:

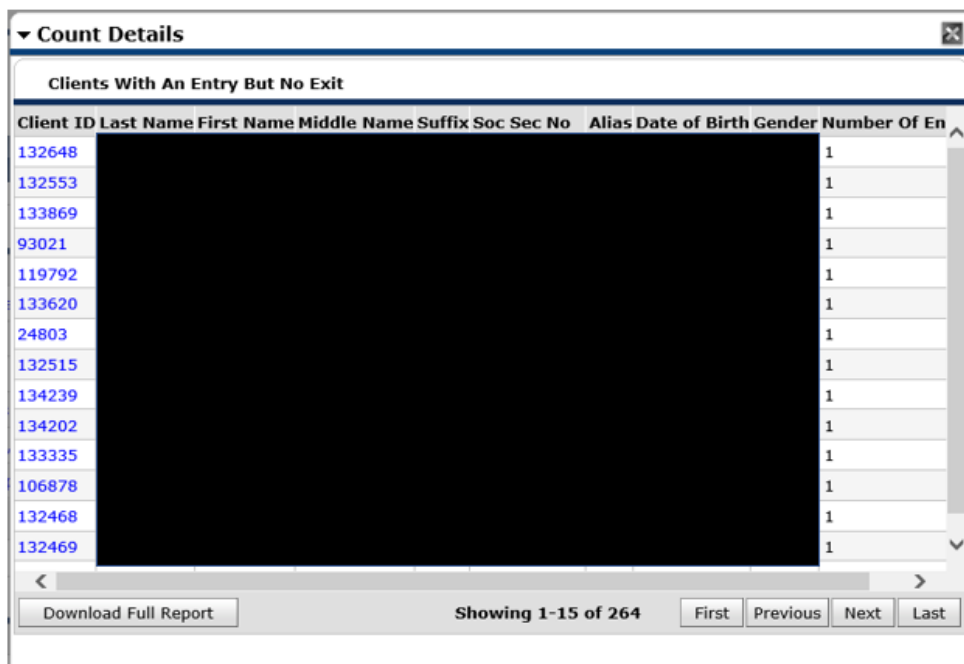
- Based on your preferences, your dashboard may not look exactly like the homepage in the following example:



To begin exiting clients, please go to the **Counts Report Table** on the right side of your screen and click on the number under **“Clients With An Entry But No Exit:”** located in the upper left quadrant of the report table:



A **Count Details** box will pop up (information has been redacted to protect client privacy):



Begin by clicking the first **Client ID** and a **Client Information Summary Page** will appear (information has been redacted to protect client privacy):

Client - (132648) [Redacted]

(132648) [Redacted]

Release of Information: **Expired**

Client Information | Service Transactions

Summary | Client Profile | Households | ROI | Entry / Exit | Case Managers | Case Plans | Assessments

Added to the system 05/07/2018 09:20 AM

Name: [Redacted] Gender: [Redacted]

Date of Birth: [Redacted] Primary Race: [Redacted]

Social Security: [Redacted] Secondary Race: [Redacted]

U.S. Military Veteran?: [Redacted]

Release of Information

Provider	Permission	Start Date	End Date
Central Intake (UWSC)	Yes	05/07/2018	05/07/2019

Entry/Exits

Program	Type	Project Start Date	Exit Date
Central Intake (UWSC)	HUD	05/07/2018	

Households

ID	Type	Head of Household	Relationship
100159	[Redacted]	[Redacted]	[Redacted]

Services

Start Date	End Date	Provider
05/07/2018	05/07/2018	Central Intake (UWSC)

Next, go to the **Households** section and make sure that there is an asterisk (**1**) next to the name of the **Head of Household (HoH)**. This person (the head of household) can be identified by being listed as **“Self”** under the **Relationship** column (**3**):

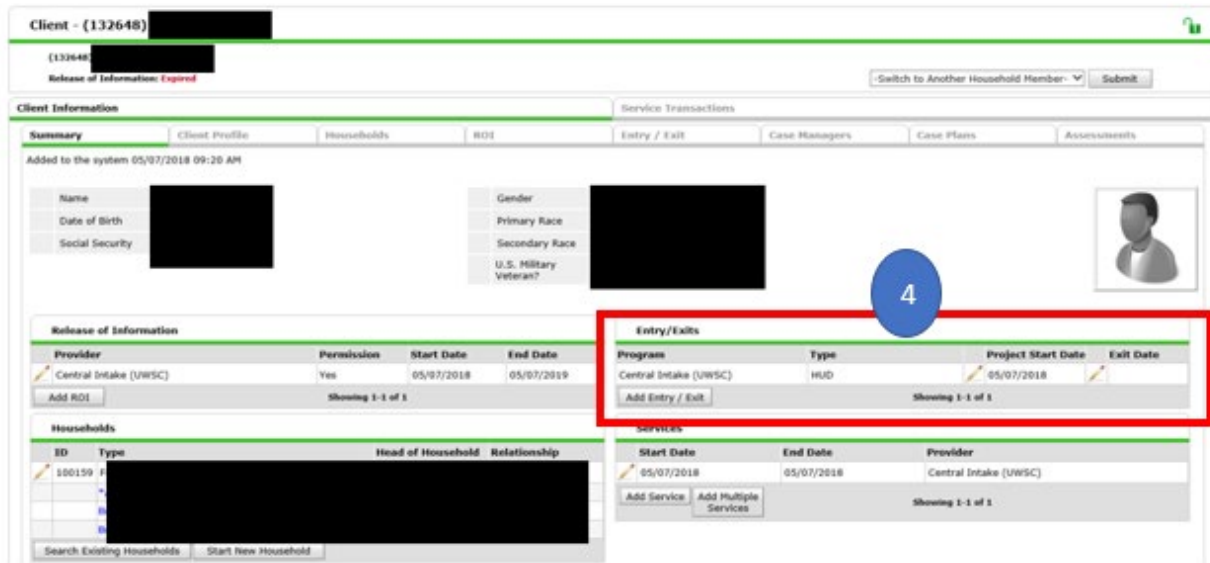
Households

ID	Type	Head of Household	Relationship
100159	[Redacted]	Yes	Self
	[Redacted]	No	[Redacted]
	[Redacted]	No	[Redacted]

Search Existing Households | Start New Household

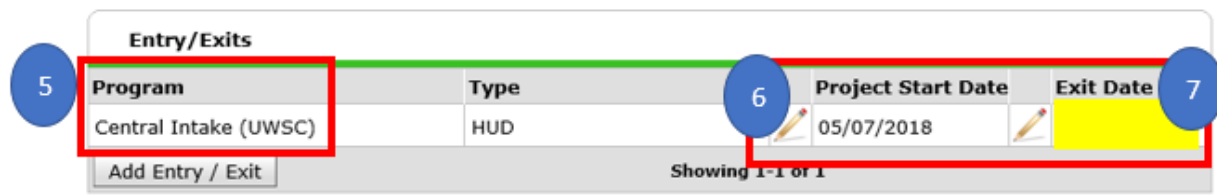
If the person identified as **“Self”** does not have an asterisk by their name, simply click on that person’s name and the **asterisk** will move to their name. This means, you’re now in the HoH’s record.

Next, please look at the **Entry/Exits Table** located on the top right quadrant of your screen:

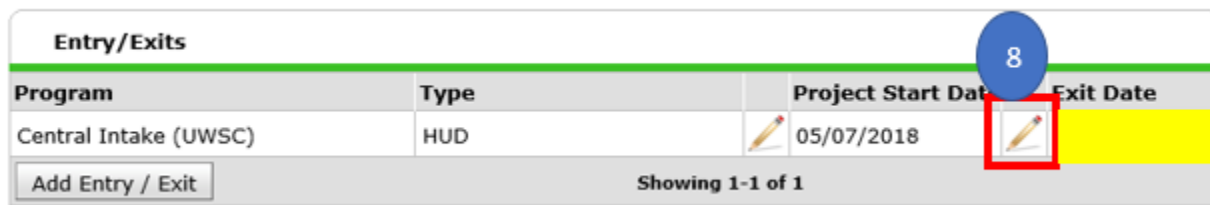


Please note that under the **Program** title, **Central Intake (UWSC)** is the only program listed for this client (5). This makes entering the exit date very simple.

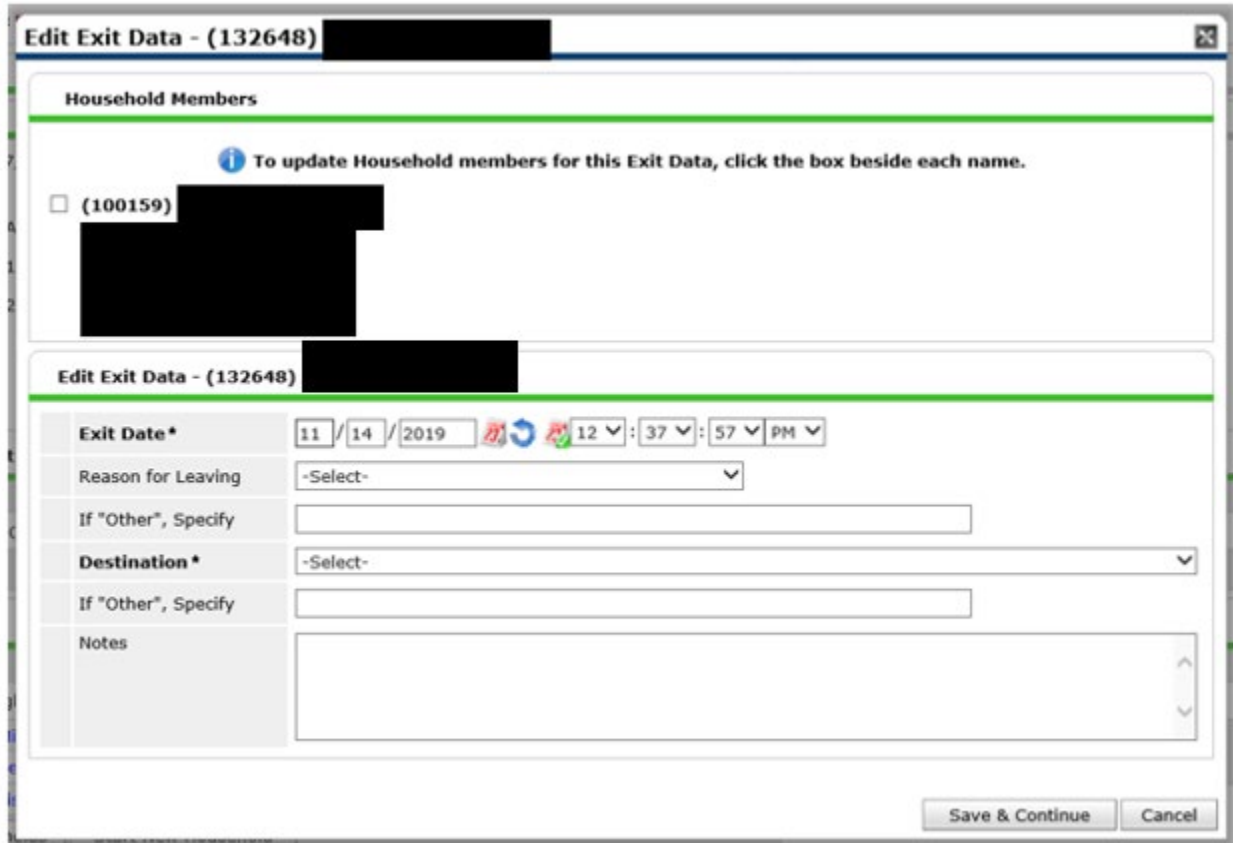
Follow that row over to the right and please take note of the **Project Start Date** (6) and **Exit Date** (7) columns and note that there is no exit date entered (yellow highlighted box). This is what needs to be corrected:



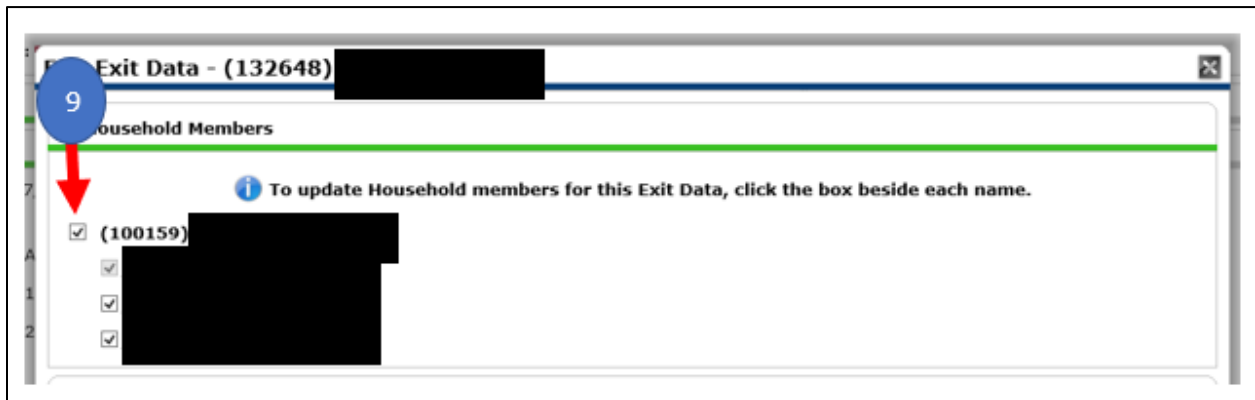
To correct this, please begin by clicking the **Pencil** located next to the missing **Exit Date**:



The **Edit Exit Data Popup Box** will appear:



To ensure that the changes will affect the entire household, please be sure to check the **box** located next to the number of the household **(9)**:



Under the **Edit Exit Data** table, please enter the **Exit Date (10)** which will **always be 3 months** after the Project Start Date, **if there are no other programs listed** in the **Entry/Exit Table**. If there are multiple programs listed, please see section below.

Next, please enter the **Reason for Leaving (11)**, and **Destination (12)** and click **[Save & Continue]** when finished and on the next page, scroll down and click **[Save and Exit]**.

If there are no other program entries listed, **Reason for Leaving** should be **[Unknown/Disappeared]**, and **Destination** should be **[No exit interview completed]**.

When encountered with a client who has participated in **multiple programs**, it is still very easy to correct a missing exit date. The same steps as above will be followed except it is important to note the **Project Start Date** of the program **following** the missing exit date. The purpose for this will be explained shortly.

Please begin by looking at the **Entry/Exits Table** for this client. The first thing we notice is that this client has participated in multiple programs, but the **Exit Date** is missing from the **Central Intake (UWSC)** entry **(13)**:

Entry/Exits			
Program	Type	Project Start Date	Exit Date
Rapid Re-Housing - Home Again (UWSC)	HUD	08/07/2019	10/10/2019
Central Intake (UWSC)	HUD	12/12/2018	
Central Intake (UWSC)	HUD	12/11/2017	04/09

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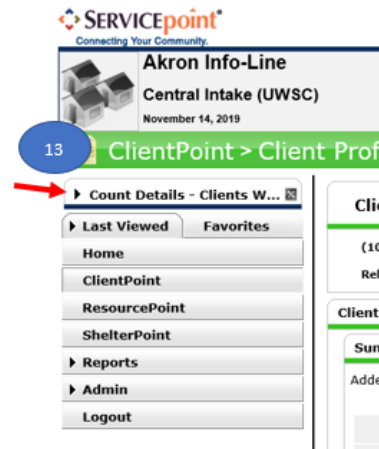
To correct this, please follow the same steps as above with one exception:

1. Take note of the **Project Start Date** of the next program. In this case, the start date for the next program was **08/07/2019**.
2. Click the **Pencil** located next to the missing **Exit Date**.
3. The **Edit Exit Data Popup Box** will appear.
4. To ensure that the changes will affect the entire household, please be sure to check the **box** located next to the number of the household.
5. Under the **Edit Exit Data table**, please enter the **Exit Date, which must be the day BEFORE the beginning date of the next program the client entered**.
  - In the example above, the exit date would be **08/06/2019**.
6. Next, enter the **Reason for Leaving**, and **Destination** and click **[Save & Continue]** when finished and on the next page, scroll down and click **[Save and Exit]**. **Reason for Leaving** should be **[Completed Program]**, and for **Destination** options, refer to the **Agency Name and Destination** table.

The exit date has now been corrected for this client. 😊

To proceed to the next client, simply go to the top left of your screen and click on the black arrow next to **Count Details – Clients...**:

This **Popup Box** will appear and the process is simply repeated for each client.



▼ Count Details									
Clients With An Entry But No Exit									
Client ID	Last Name	First Name	Middle Name	Suffix	Soc. Sec. No.	Alias	Date of Birth	Gender	Number Of En
132648									1
132553									1
133869									1
93021									1
119792									1
133620									1
24803									1
132515									1
134239									1
134202									1
133335									1
106878									1
132468									1
132469									1

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## United Way of Summit County - HMIS CI Exit Manual – Updated May 19, 2022

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I hope you found this manual helpful. ☺ Please feel free to reach out to me with any questions:

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