# HMIS Support Manual - Client Exit User Manual

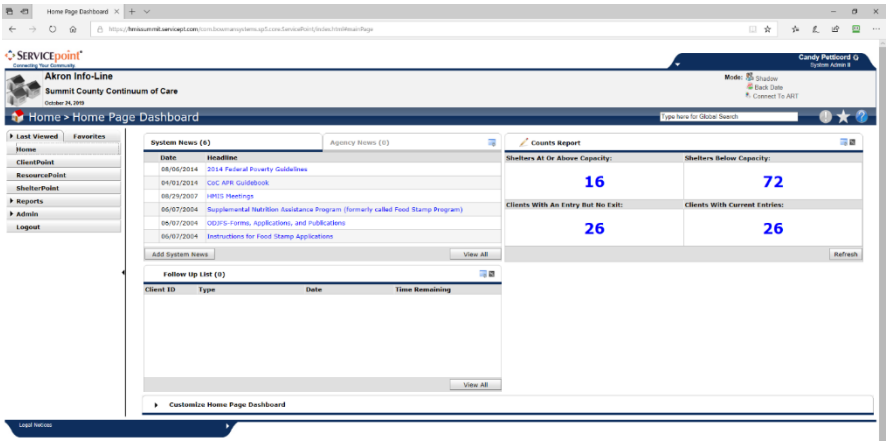
Welcome to the UWSC's HMIS Central Intake (CI) Client Exit User Manual.

Let's Begin:

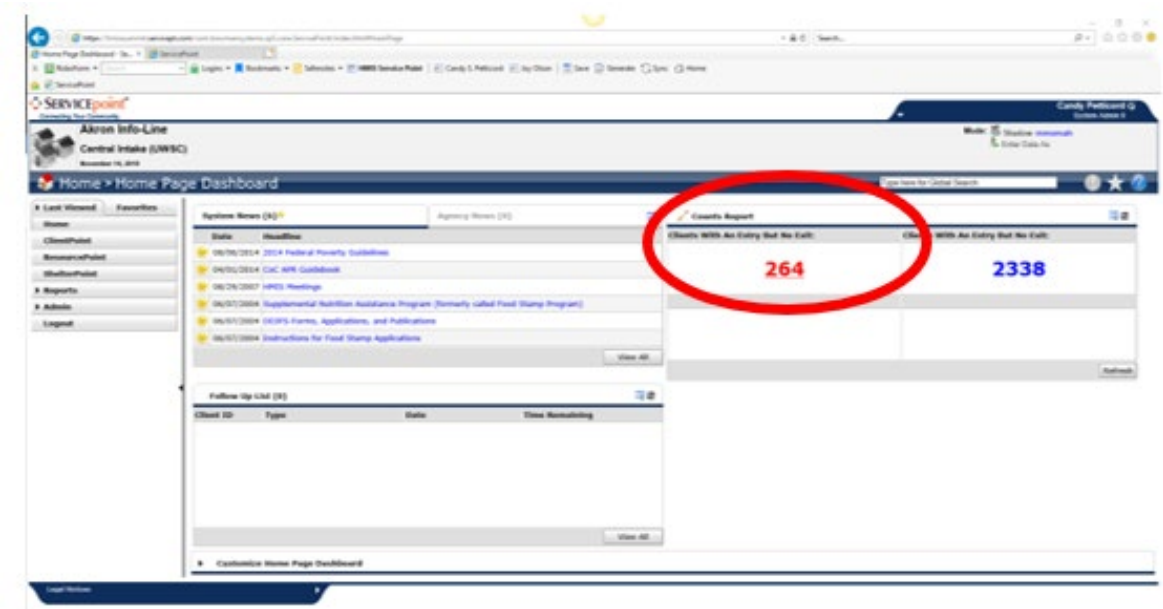
We begin by navigating to the Servicepoint website: https://hmissummit.servicept.com/.

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:

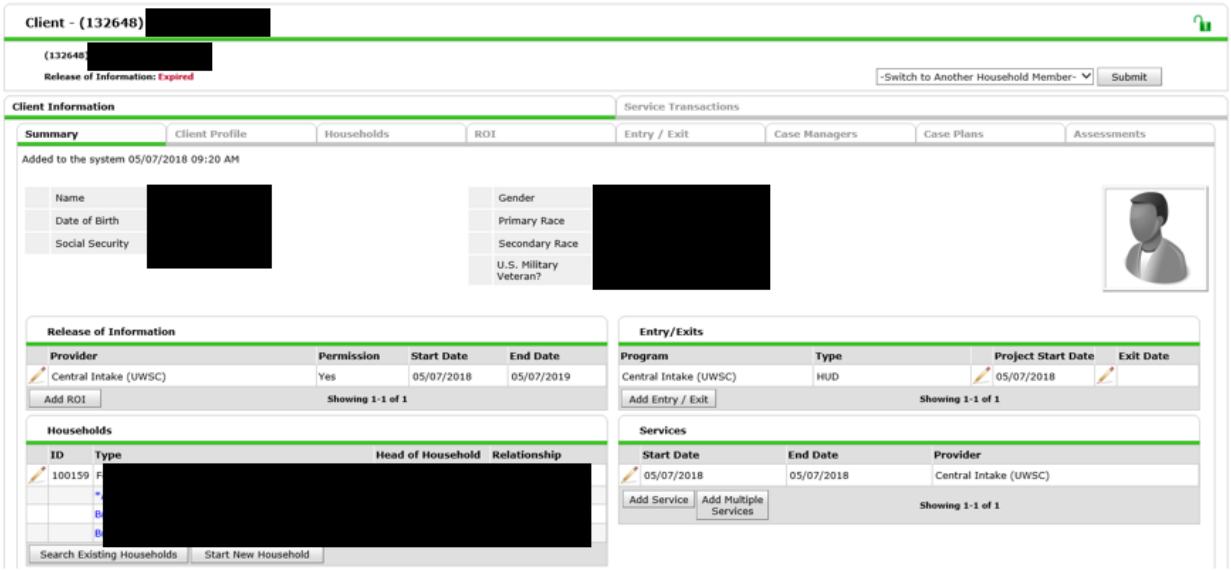


To begin exiting clients, please go to the **Counts Report Table** on the right side of your screen and click on the number under "**Clients With An Entry But No Exit:**" located in the upper left quadrant of the report table:

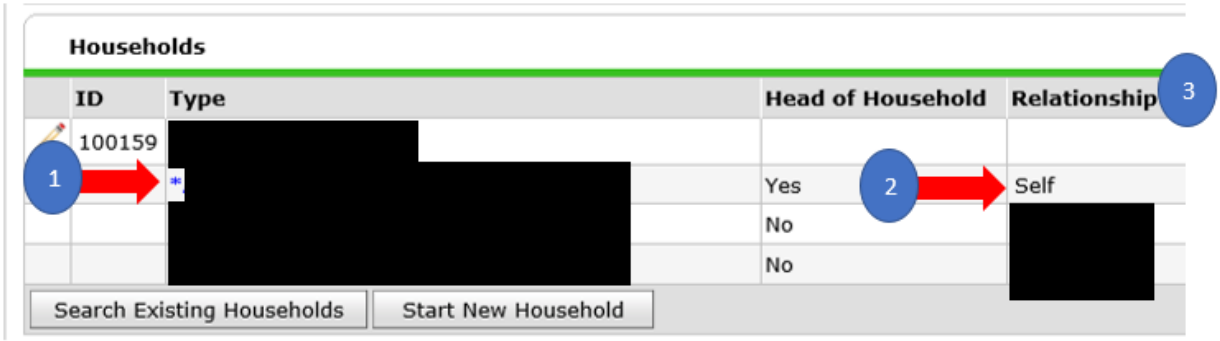



A **Count Details** box will pop up (information has been redacted to protect client privacy):

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

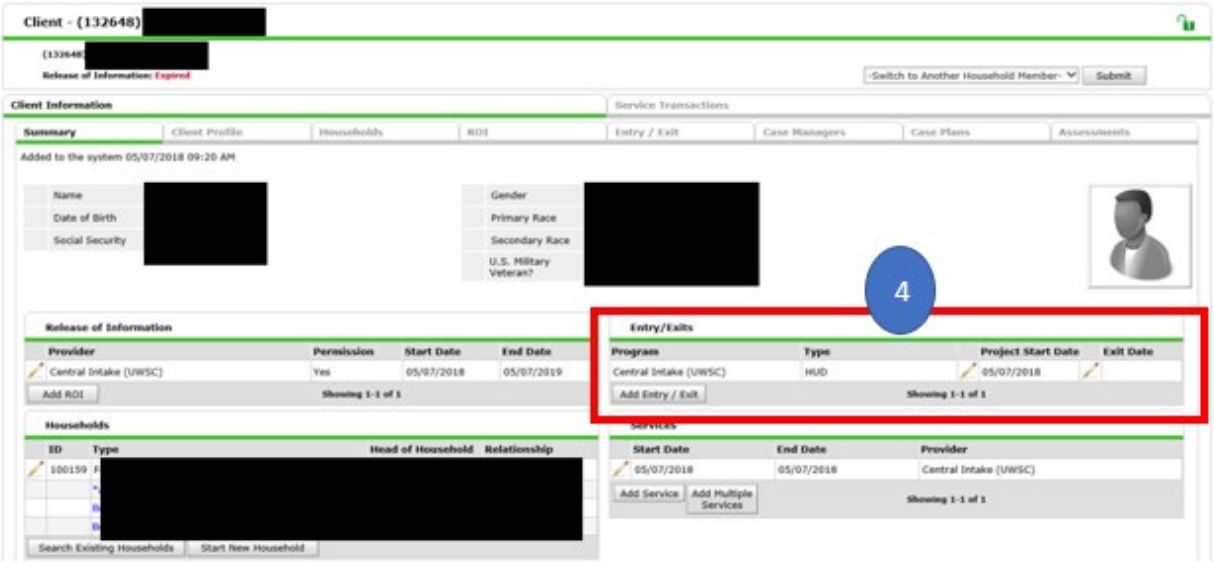



Next, go to the **Households** section and make sure that there is an asterisk **(1)** next to the name of the **Head of Household (HoH**). This person (the head of household) can be identified by being listed as "**Self"** under the **Relationship** column **(3)**:



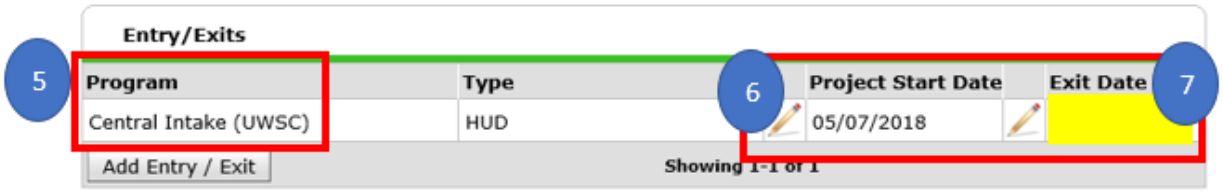

If the person identified as "**Self**" does not have an asterisk by their name, simply click on that person's name and the **asterisk** will move to their name. This means, you're now in the HoH's record.

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

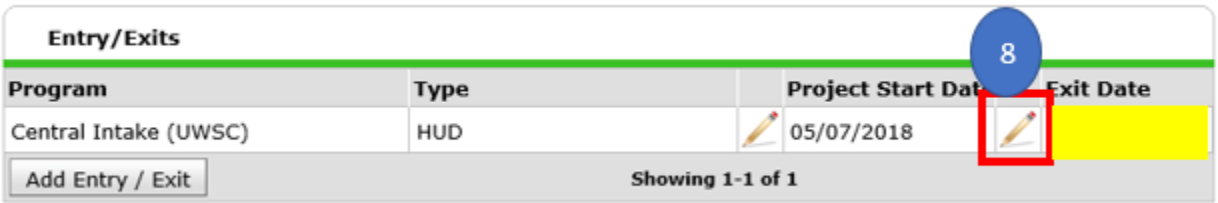



Please note that under the **Program** title, **Central Intake (UWSC)** is the only program listed for this client **(5)**. This makes entering the exit date very simple.

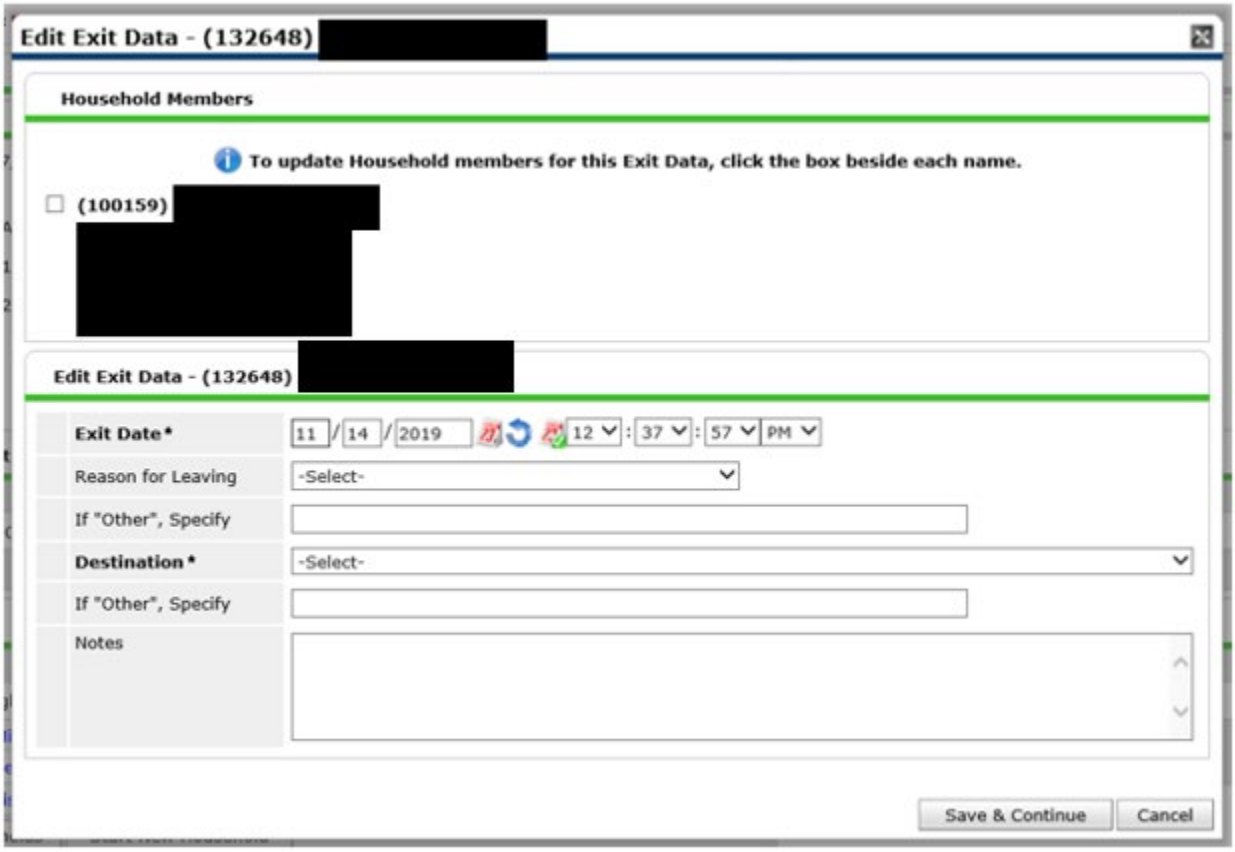
Follow that row over to the right and please take note of the **Project Start Date (6)** and **Exit Date (7)** columns and note that there is no exit date entered (yellow highlighted box). This is what needs to be corrected:



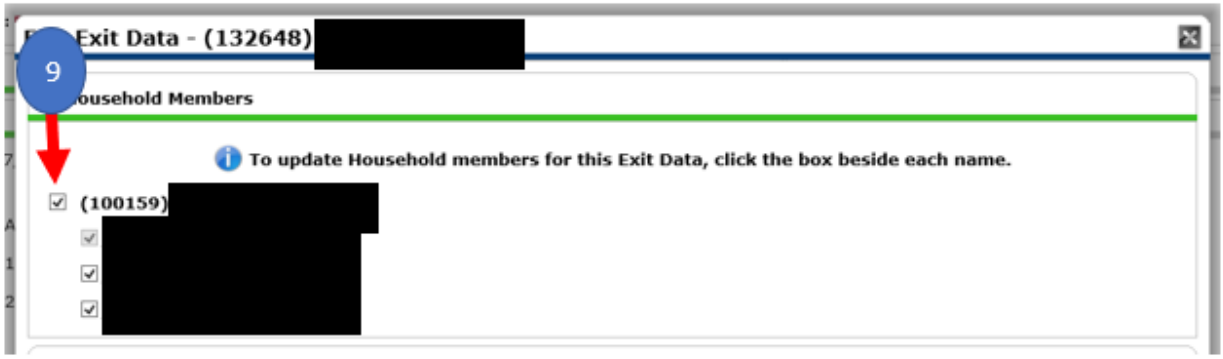

To correct this, please begin by clicking the **Pencil** located next to the missing **Exit Date:**



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

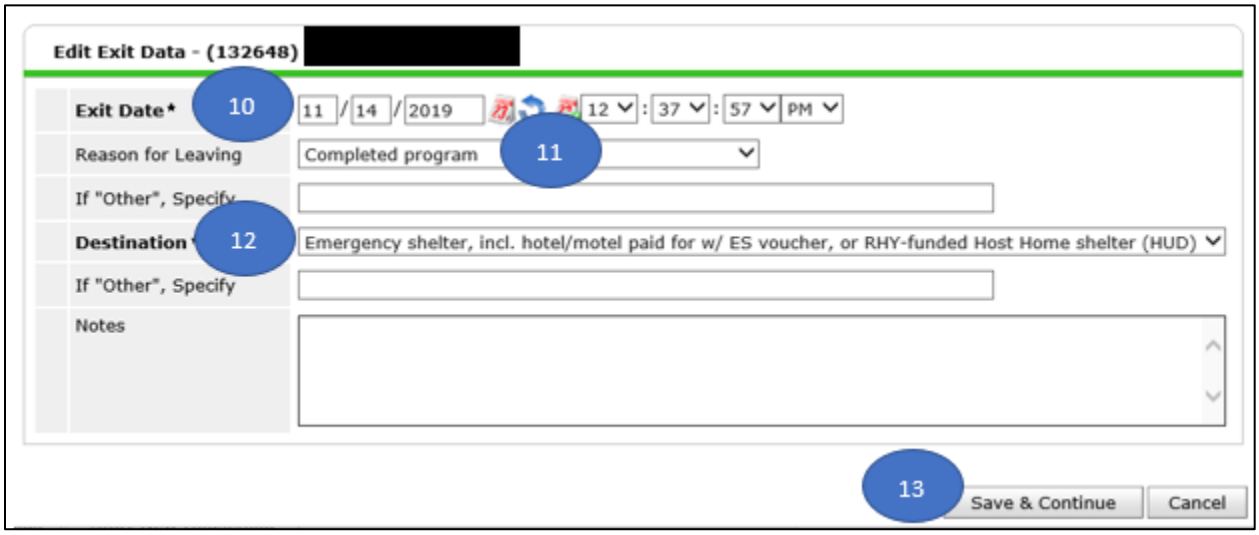



To ensure that the changes will affect the entire household, please be sure to check the **box** located next to the number of the household **(9)**:



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.

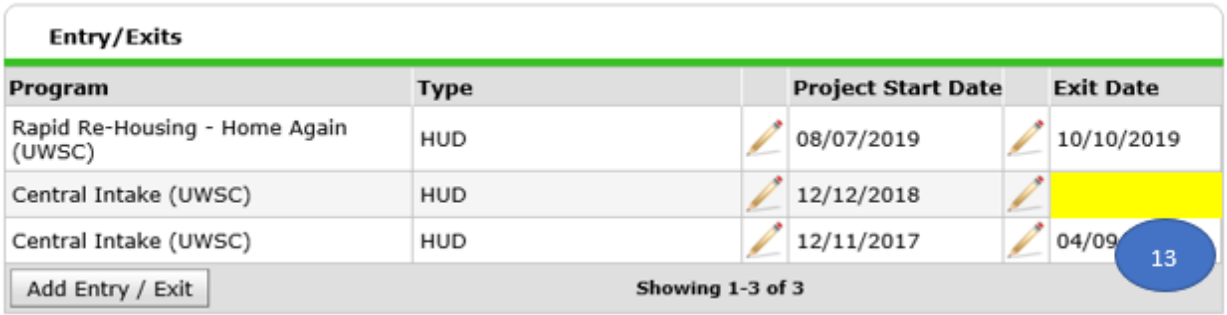
Next, please enter the **Reason for Leaving (11),** and **Destination (12)** and click **[Save & Continue]** when finished and on the next page, scroll down and click **[Save and Exit]**.




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)**:



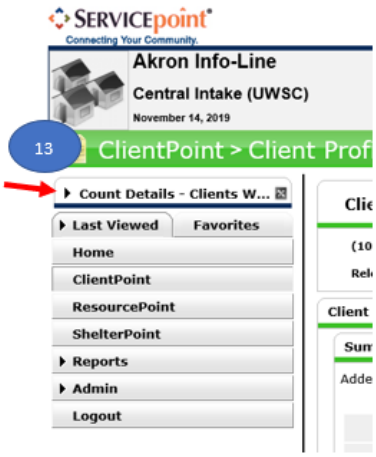

To correct this, please follow the same steps as above with one exception:

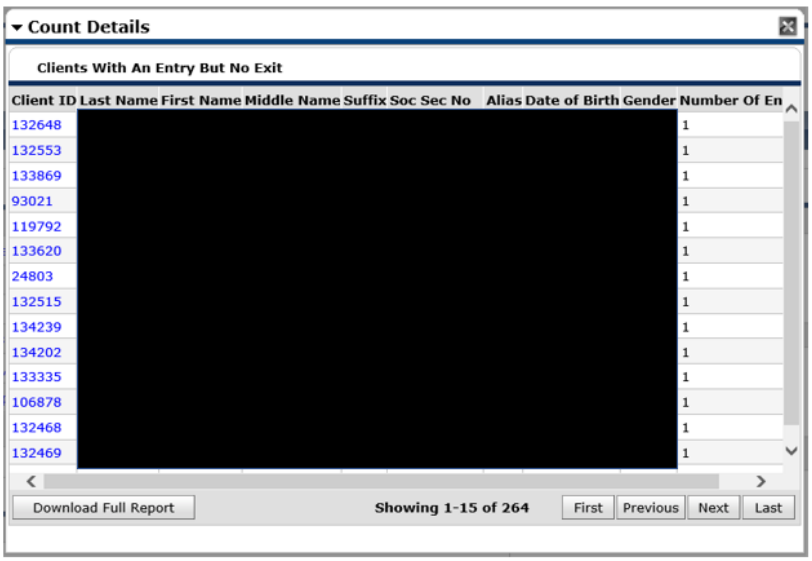
1. Take note of the **Project Start Date** of the next program. In this case, the start date for the next program was **08/07/2019.**
2. Click the **Pencil** located next to the missing **Exit Date.**
3. The **Edit Exit Data Popup Box** will appear.
4. To ensure that the changes will affect the entire 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.



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

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