HMIS Case Management Workflow Checklist

Within 14 days of starting case management with a client:

☐ Create an entry for Case Management using the case management EDA

- Complete or update existing information the Hennepin Case Management assessment
- Review and update information in the ESG assessment if changed since their last assessment. Pay particular attention to make sure these sections are accurate:
    - Required
        - Disabling Condition
        - Relationship to Head of Household
        - Veteran and Domestic Violence Series
        - Section 3A—Housing Situation
        - Section 3B—Client Location should = MN-500 Hennepin
    - Optional (helpful for outcomes reporting)
        - Section 2A—Income

☐ Enter your name and start date into the Case Managers tab (using case management EDA)

Every time you meet with a client, and something changes:

☐ Create an interim update and update any missing or outdated information

- If they have vital documents, make sure it's reflected under Housing Documentation Status and upload copies in HMIS
- Add a new Current Living Situation if they've left shelter, but you're continuing to work with them

Within 14 days of ending case management with a client:

☐ Create an exit for Case Management (using the case management EDA)

- Make sure the Destination you enter is as accurate as possible. This is used to track housing outcomes.
- Add a Current Living Situation. It should match the Destination you selected.
- Update Housing Documentation Status and upload copies in HMIS. This will help the client if they return to homelessness or start working with a different case manager.

☐ Add an end date to the Case Managers tab (using case management EDA)

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