Institute for Community Alliances

# STREET OUTREACH AT A GLANCE

## Project Start

- First contact
  - Fill out as much of the **Entry** assessment as you can, including **Current Living Situation**

## All Subsequent Contacts

- Complete an **Interim Review (Update)** with a **Current Living Situation** for each contact
- Edit the **Client Profile** or **Entry** (see page 5) as you obtain missing information that was true at **Project Start**

## Engagement

- An interactive client relationship results in a deliberate client assessment or beginning of a case plan
- Complete an **Interim Review (Update)** with **Current Living Situation** and **Date of Engagement**
- Data Quality begins here, check the **Client Profile** and **Entry** to ensure all data are complete

## Project Exit

- The client has entered another project type (e.g., TH, PSH) or otherwise found housing
- The client is engaged with another outreach worker or project
- The client is deceased
- The outreach worker has been unable to locate the client for 90 days

## OUTREACH WORKFLOW

1. **1st Contact = Project Start Date**
    a. Create client record and profile information
        i. Make sure ROI is signed or verbal consent received after reviewing ROI with client
        ii. Document ROI using the [General HMIS Instructions]
        iii. If ROI is not signed at first contact, make a closed record using the instructions linked above, and create a new open record if they later sign the ROI, as the ROI is not retroactive.
        iv. If client full name is not disclosed use a temporary, partial, or street name to identify the client in HMIS.
    b. Entry/Exit Tab
        i. Entry to HMIS provider
            1. If client is residing in an unsheltered setting (place not meant for habitation), create Entry in the Street Outreach (SO) provider.
            2. If client is residing in shelter or other residential type setting, create Entry in the Supportive Services (SSO) provider.
        ii. Complete Current Living Situation sub-assessment
        iii. Complete as much of the Outreach assessment as possible with information gathered at first contact
    c. If your funding source requires them, record services[1]
2. **Each additional contact**
    a. Entry/Exit Tab
        i. Locate open outreach Entry/Exit - add interim update
            1. Record Current Living Situation
            2. Update any information that has changed since project start such as income or non-cash benefits
            3. Save and Exit interim update
        ii. Add missing information to Entry as you learn it
            1. Note: this should be done in the Entry, not the interim update
    b. If your funding source requires them, record services
3. **At Engagement**: When interactive client relationship results in a deliberate client assessment or beginning of a case plan.
    a. Entry/Exit Tab
        i. Locate open outreach Entry/Exit - add interim update
            1. Complete Current Living Situation and date of engagement
            2. Update any information that has changed since project start such as income or non-cash benefits.
            3. Save and Exit interim update after all updates have been made
        ii. Edit the entry (edit pencil next to project start date):
            1. Complete Full assessment - including any missing information you did not have when you first entered the client
            2. All data elements must be dated on or before date of engagement
4. **Project Exit**: Project exit represents the end of a client's participation with a project.[2]
    a. Reasons to exit a client include:
        i. The client has entered another project type (e.g., TH, PSH) or otherwise found housing;
        ii. The client is engaged with another outreach worker or project;
        iii. The client is deceased;
        iv. The outreach worker has been unable to locate the client for 90 days or there are no contacts recorded in the Current Living Situation (4.12).
            1. In the case where there are no contacts/Current Living Situation recorded by the Street Outreach Provider since Project Start Date, the Project Exit Date may be the same as the Project Start Date.
    b. Entry/Exit tab
        i. Locate open outreach Entry/Exit – click edit pencil next to exit and complete exit assessment

[1] Currently Service Transactions are only required for PATH providers

[2] The exit date should coincide with the date that the client is no longer considered to be participating in the project. This standard should be applied consistently across all Street Outreach projects.

## ADDITIONAL INFORMATION:

**Street Outreach vs. Supportive Services Only:** Of note, only persons who are "street homeless" should be entered into a Street Outreach provider. Projects that also serve persons other than "street homeless" should have two separate providers in HMIS, one "Street Outreach, and one "Supportive Services Only"

1. If client gave an answer with a place not meant for habitation, then enter the client in your Street Outreach provider
2. If the client responds with an answer consistent with a place meant for habitation, including emergency shelters, then enter the client in your Supportive Services provider.
3. If the client does not provide an answer, wait until you can get an answer, and enter the client into HMIS at that point
4. If they do not provide an answer, and you never encounter them again, you should enter the into the Supportive Services Only provider.

**Contacts:** A contact is defined as an interaction between a worker and a client designed to engage the client. Contacts include activities such as a conversation between the street outreach worker and the client about the client's well-being or needs, an office visit to discuss their housing plan, or a referral to another community service. **A Current Living Situation** (4.12) must be recorded anytime a client is met, including when a **Date of Engagement** (4.13) **or Project Start Date** (3.10) is recorded on the same day.

**Current Living Situation:** This is how contacts are logged. You will complete one Current Living Situation for every contact you have with a client.

- Should be collected for heads of household (including unaccompanied youth) and adults
- Collected at each **Contact** for street outreach
- Record the date and location
- The first **Current Living Situation** should be the same as the **Project Start Date**
- There should be a **Current Living Situation** recorded on the **Date of Engagement**

**Date of Engagement:** The date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan. There can only be one **Date of Engagement** per **Entry/Exit**, and it must be on or after **Project Start**, and on or before **Project Exit**. If they exit without becoming engaged, the date should remain blank.

- Should be collected for heads of household (including unaccompanied youth) and adults
- Collected at engagment
- If the client returns after a project exit, a new **Project Start Date** and new **Date of Engagement** should be added

Please see the Data Standards Guide for more information on these and other data elements.