HMIS Document

PROVIDER GUIDANCE

CLIENT EXITS FROM CLIENTTRACK

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1. Purpose

The purpose of this document is to provide guidance to partnering agencies regarding client exits for projects. This document provides all the information a provider needs to understand about what happens with clients exits (via admin exits or auto-exit feature), communication available to providers and time frames for completing the client exits. These processes are necessary to improve the quality of the data in our system as reported within the System Performance Measures (SPMs) submitted annually to HUD.

2. Scope

This document is applicable to all service projects (project types SSO and OT), and street outreach projects (project type SO). This document does not provide the detailed steps used by the HMIS staff to perform the actual client exits. Those steps are defined in a separate document "Administrative Client Exits Documentation".

3. Prerequisites

The prerequisites for this process is an active user license to access the HMIS software and be a member of the HMIS staff.

4. Process

This document does not provide the technical steps to perform admin client exits. Unless otherwise specified, the following standards apply to all SSO and SO project admin exits.

- For SSO and OT projects, Auto Exit is set to 90 days and Auto Alert is set to 80 days.
- For SO projects, Auto Exit is set to 365 days and Auto Alert is set to 300 days.

4.1 Overview of Client Exits

There are three methods that clients can be exited from projects:

- Timely exits by agency case managers,
- Auto-exit for applicable project types described above, or,
- Administrative exits performed by HMIS staff members.

The first option is always the preferred and encouraged method for exiting clients. In general, Auto-Exits will be used for the project types listed above. Admin Exits are typically used with housing projects and for special circumstances as required. The other two options are utilized as methods to maintain the data quality of the entire HMIS system. The "Auto Exit" and "Admin Exit" method overviews are described in separate sections below.

This section outlines how the HMIS Staff identifies projects that have client enrollments longer than the HUD recommended time frame or the length of time an agency has defined regarding how long they need or want to keep client enrollments active. These projects may have the "Auto-Exit" and "Auto-Alert" features enabled. Details about Auto-Exit and Auto-Alert setup are found in the "HMIS Organization and Project Administration Documentation" document.

4.1.1 Sources for Information for Client Exits

ClientTrack reports will be used to identify projects as candidates for admin or auto exits. These reports can be run by agency staff or HMIS staff. Projects in need of admin or auto exits can also be identified as part of Data Quality Monitor (DQM) quarterly project reviews.

4.1.2 Agency/HMIS Agreement

The appropriate agency liaison responsible for a candidate project will be notified by a HMIS staff member that client exits must be completed within an agreed upon time period. The agency can use this time period to perform timely exits for their clients. After the time period has expired, the agency liaison will be notified that the admin or auto exit process will begin.

4.2 Overview of Client Auto Exits

Auto Exits are used by projects that are primarily providing service transactions for clients that don't involve overnight stays in shelters or housing projects. An Auto Exit is setup to exit a client (and his enrolled family member, if any) from the project enrollment at the end of the time period, with an exit date that matches the date of the last service the client has received.

4.2.1 Client Auto Exits

The following steps will be taken to begin the Auto Exit process.

1. The project will have the "Auto Exit" and "Auto Alert" features enabled for the specified project, based on agreement with the Agency Liaison for the time frame required. The standards listed above will be used if no other time period is defined by the agency liaison.
2. At the end of the first time period since enabling auto-exit, Agency Liaisons should review their list of active clients in ClientTrack to ensure the Auto Exit feature exits the appropriate clients. For any issues or challenges, submit a helpdesk ticket by sending an email to hmis@hsncfl.org.

4.2.2 Agency Liaison Confirmation of Completion

The project Agency Liaison will notify the HMIS staff via a helpdesk ticket for issues with the auto exit feature. The Agency Liaison and HMIS staff will coordinate activities necessary to review and correct the issues.

4.2.3 Follow Up DQMs

Following completion of the client exits, subsequent DQM events will review the status of current enrollments to ensure the Auto-Exit feature is working as planned.

4.3 Overview of Client Admin Exits

Client exits by Admin Exit are the least desirable method to exit clients from project enrollments. These exits use the “Exit Destination” value of “No Exit Interview Completed”, which is considered by HUD to be an “undesirable” choice. These exits also set the “Exit Reason” field to “Administrative Exit”.

4.3.1 Client Admin Exits

The following steps will be taken to begin the Auto Exit process.

1. The project Agency Liaison and the HMIS staff will agree on a time period for completion of the Admin exits.
2. The HMIS Staff will perform the Admin Exits.
3. At the end of the first time period since enabling auto-exit, Agency Liaisons should review their list of active clients in ClientTrack to ensure the Auto Exit feature exits the appropriate clients. For any issues or challenges, submit a helpdesk ticket by sending an email to hmis@hsncfl.org.

4.3.2 Agency Liaison Confirmation of Completion

The HMIS staff will notify the project Agency Liaison following completion of the Admin Exits. The Agency Liaison and HMIS staff will coordinate activities necessary to review and correct any issues. Following conclusion of the closure process, the Agency Liaison will send an acknowledgement email to the HMIS Staff indicating that the exits have been successfully completed.

4.3.3 Follow Up DQMs

Following completion of the client exits, subsequent DQM events will review the status of current enrollments to ensure the Admin Exits are working as planned.

4.4 Feedback and Continuous Improvement

All agencies and Agency Liaisons are encouraged to provide feedback on their experience with Auto Exit and Admin exit processes.

5. Appendix

5.1 Referenced Documents

The following documents are referenced by this document:

Administrative Client Exits Documentation

HMIS Organization and Project Administration Documentation

Document History

Date of Revision	Document Version	Revision Notes
08/09/2023	1.0	Creation of document.