



HMIS Document

# **PROVIDER GUIDANCE PROJECT INACTIVATION PROCESS**

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# 1. Purpose

The purpose of this document is to describe and record the “big picture” process to inactivate a project. The details of changes to the project in our HMIS are recorded in a separate document ([HMIS Document-Organization and Project Administration](#)).

# 2. Scope

This process applies to all projects within ClientTrack and can be applied anytime a project has been identified by the owning agency as complete. Details about project closure must be provided by an agency liaison at the organization where the project has been implemented. Related processes, such as client exits, administrative exits, and auto-exit setup are referenced here and documented in their own documents, referenced in the Appendix.

# 3. Prerequisites

This document provides guidance to CoC Partner Agencies regarding project closure in ClientTrack. Agency liaisons must submit project inactivation requests through the Zendesk ticket system. No other technical requirements are needed by the agencies in order to use this document and process.

# 4. Process

This document section provides an overview of the steps required by an agency and the HMIS Staff to inactivate a project.

## 4.1 Process Initiation

This process begins with notification to the HMIS team that a project needs to be closed. The source of the notification is not restricted and can come from anyone in the CoC. Project closure will be tracked as a set of Salesforce tasks. These tasks will be created at the beginning of the process. Tasks fall into the following categories:.

1. Research/Review Project
2. Communication Process
3. Normal Inactivation Process
4. Administrative Inactivation Process

Each of these tasks is described below.

## 4.2 Research/Review Process

This process involves contract review for the project to ensure the contract end date has been reached and that all clients have been exited from the project and any services provided have been documented in HMIS.

1. Review the project contract to identify any remaining open technical requirements. These requirements can include last service date for clients and final reporting requirements. NOTE: This process shall NOT include review of financial contract requirements.
2. Based on final dates, run reports to identify any clients that must be exited from the project. Contact agencies that provide services to the client to inform them that any services not already entered in ClientTrack must be entered/completed prior to timeframe specified in item 3 below. If there are any actions required from the agency owner of the project, provide the reporting results to them for updates to be completed prior to project closure.
3. Identify timeframe for exiting clients.

### 4.3 Communication Process

This process involves communicating with the agency operating the project and its grantor agency or jurisdiction about project closure. Agreement about project closure is determined, including timeframes for “zz” (i.e. inactivation) steps, last reporting date, etc.

1. Organize and schedule meetings with the project owning agency and the funder (funder is optional). The purpose of the meeting is to review contract reporting requirements, steps the agency has to perform prior to project closure and any other issues arising at the meeting. One of the primary goals of the meeting is to identify a date for “project inactivation”, which includes all clients exited from the project.
2. Share meeting results and tasks with meeting participants, including due dates for all actions to be performed.
3. Update Salesforce task(s).

### 4.4 Normal Inactivation Process

This process prevents future data entry into the project and removes the project from reporting processes at the appropriate time. The broad list of tasks given below are described in more detail in the HMIS Document-Project Administration document.

1. Review actions from Inactivation Step 2, item 2 to ensure project is ready for closure.
2. Modify project settings, including renaming the project starting with the character string “zz-”.
  - a. Project End Date
  - b. “Clients Can Enroll” is set to “No”
  - c. Bed inventories are closed
3. Communicate project closure to all

### 4.5 Administrative Inactivation Process

This process would be used for projects that cannot be closed by the agency responsible for the project due to large numbers of clients to be exited. These exits would be handled by the HMIS Team.

1. Begin with Step 2 above in section “Communication Process”.
2. Run an APR for the project as specified.
3. Identify HMIS team resource(s) that will exit the clients on the APR.

4. Identify a completion date for inactivation and communicate to owning agency/organization and the funder.
5. Mark the project field "Clients Can Enroll:" as "No" to prevent additional client enrollments.
6. Exit all clients using the "Operating End Date" of the project as the exit date. These clients exit destination will be records as "Unknown/Disappeared".
7. Create "Change Log" entries in Salesforce for each day that you spend exiting clients from the project, using a count to indicate how many clients are exited in that session.
8. Close the project, communicate project closure to all.

Informational Tip:

1. Administrative exits of clients are performed by the HMIS staff members.
2. Detailed steps for administratively exiting clients are found in the document "[Administrative Client Exits](#)".

## 5. Appendix

### 5.1 Referenced Documents

The following documents are referenced in this document.

HMIS Document-Organization and Project Administration  
Administrative Client Exit Documentation

## 6. Document History

Date of Revision	Document Version	Revision Notes
2023/08/21	1.0	Creation of document.