

## Project Roomkey HMIS Data Entry Instructions

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Before entering data into the Housing First Solano Homeless Management Information System (HMIS) for Project Roomkey, participating providers must have:

- Completed a training session with the HMIS Lead;
- Returned a signed copy of the [HMIS Confidentiality and Security Agreement](#) to [solano@homebaseccc.org](mailto:solano@homebaseccc.org); and
- Secured an HMIS user license and an active user account.

Once these requirements are fulfilled, providers should adhere to the following steps to enter and exit clients from the COVID non-congregate shelter (*i.e.* Project Roomkey) program in HMIS:

- First, the provider must determine whether there is an existing record for the client in HMIS by using the Client Search feature in ClientPoint. If there is not, a new record will need to be created for the client.
- Second, the client must sign the [release of information](#) before the provider can enter any new data into HMIS. Once a client has provided consent, the provider must indicate in HMIS that the release has been granted by navigating to the ROI tab and clicking “Add Release of Information.” The ROI expiration date is two years from the ROI start date. If the client’s release was provided over the phone, the provider should select “Verbal Consent” in the Documentation field. For clients who provided verbal consent, it is recommended that providers obtain a signed release of information from the client at the earliest possible opportunity.
- Third, the provider should enroll the client in Project Roomkey by navigating to the Entry/Exit tab, clicking “Add Entry/Exit,” and selecting the appropriate project. Available projects are:
  - “COVID Project Roomkey: Fairfield” (238)
  - “COVID Project Roomkey: Vacaville” (237)
  - “COVID Project Roomkey: Vallejo” (232)

Please note that only one of the above projects will be visible to the provider. The appropriate project will be used for all clients enrolling in the non-congregate shelter program irrespective of whether the client’s expenses are FEMA reimbursable. Providers should select “HUD” as the Entry/Exit type. After clicking “Save & Continue,” the provider should complete the standard HMIS [intake](#) assessment. This assessment is consistent with HUD’s data standards and is available on the Provider Resources [page](#) of the RCS website. When this assessment is completed, click “Save & Exit” at the bottom of the screen.

- Fourth, the provider should complete a short assessment that is specific to the Project Roomkey program for each head of household. There are two such assessments available: (1) an assessment required for FEMA reimbursement ([“FEMA Assessment”](#)); and (2) an

assessment used for non-FEMA enrollments (“[Project Roomkey Assessment \(Non-FEMA\)](#).” These assessments are accessible by clicking the pencil icon next to the relevant project entry date in the Entry/Exit tab, clicking “Save & Continue” on the pop-up window, and selecting the correct assessment under “Select an Assessment.” Providers should complete one – but not both – of these assessments for each head of household. When this assessment is completed, click “Save & Exit” at the bottom of the screen.

- Fifth, the provider will need to upload any related documents, such as verification documentation for the COVID-19 screening results, into HMIS. This is done by clicking on the clip icon on the right side of the relevant project in the Entry/Exit tab and clicking “Add New File Attachment.”
- Sixth, the provider will need to use the HMIS ShelterPoint module to select the actual bed the client will be occupying from a list of beds and units and check the client into that bed. Click on the ShelterPoint tab on the left side of the screen, click the “COVID Project Roomkey” project that corresponds to your jurisdiction in the Provider field, select the appropriate unit list and click “Submit.” Click “Check Client In” and select the appropriate unit and bed the client will be occupying.
- Seventh, when it is time for the client to exit the program, the provider will need to complete the standard [exit](#) assessment for the client and exit the client from the program in HMIS. Open the Entry/Exit tab in the client record, click on the pencil icon below the Exit Date for the relevant enrollment, and complete the standard exit assessment. The client will also need to be checked out from their unit in the ShelterPoint module.

If providers have any questions about the above steps, please email [solano@homebaseccc.org](mailto:solano@homebaseccc.org). A Zoom training session can be scheduled upon request.