HPRP/HMIS Tip of the Week #16
How to Exit a Client

This document goes along with the COHHIO webinar conducted on Monday, 11/8/2010. There has been a change recently, in the workflow surrounding exiting clients.

Generally speaking, to exit a household properly, you must save an OH HPRP Exit assessment for every member of the household and it must be backdated to the Exit Date. Then you must go to the Entry/Exit button and add the Exit Date along with the usual exit data you have always saved at exit.

Assessment-wise, think of each client as having the HPRP assessment backdated to the Entry Date and the OH HPRP Exit assessment backdated to the Exit Date.

More specifically, the steps look like this:

Step 1: Pull up the Head of Household (HOH) and click the Assessments tab. In the Assessment List (Figure 1), click “OH HPRP Exit”.

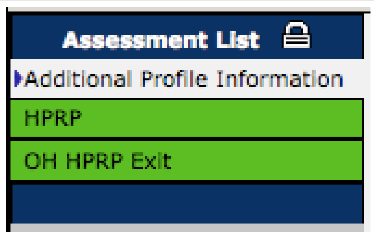

***Figure 1:** Assessment List*

Step 2: In the Assessment Date field, enter the Exit Date and click “Backdate”.
Step 3: You will notice that your client’s Housing Status at Exit field will be populated with the Housing Status you selected from the HPRP assessment. (See Figure 2.) It’s OK for it to be this way!

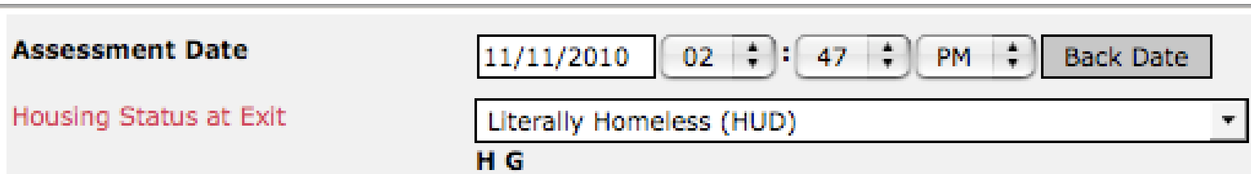

***Figure 2:** Housing Status at Exit*

Step 4: Select the client’s new Housing Status as of the Exit Date. If there has been any change in income or non-cash benefits, then update that information as well. Don’t forget to Save.
Step 5: Click into your Household if it isn’t already expanded and select the next household member.
Step 6: Repeat steps 3-5 until you have saved OH HPRP Exit assessments for all members of the household.
Step 7: Go back into Live Mode.
Step 8: Click the Entry/Exit button. (See Figure 3.)

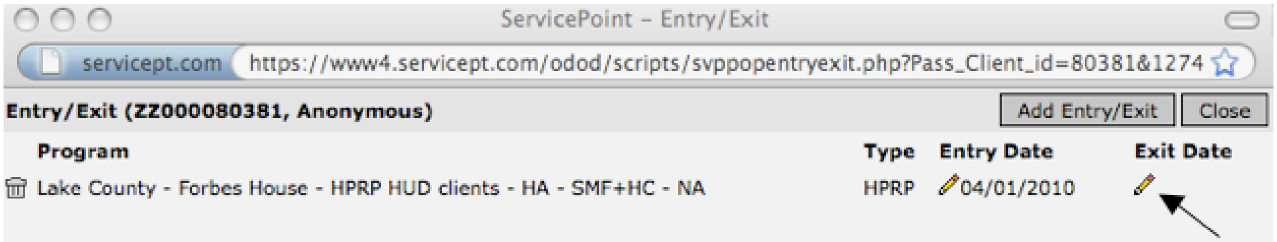

Figure 3: *Entry Exit screen. Click the Exit Date pencil to enter your Exit data.*

Step 9: Click the Exit Date pencil. Enter your Exit date, Destination, and Reason for Leaving. Make sure all household members are checked. Save and Close.

More about Exiting clients:

REVIEW: A client's exit date reflects the earliest date the household can be considered to be "flying on their own". It means you are not expecting to see them back at least for a few months. Your exit date and time must be *after* the most recent service transaction in the episode in question. It does not have to extend all the way to the date your funds will keep the client in housing.

Another potentially confusing issue is the Destination field. Destination can really be thought of as "Type of Living Situation at Exit", or on their exit date. So if you exit a client and shortly thereafter they wind up in jail, their Destination would NOT be "Jail". It would be whatever Living Situation they were in on their exit date.

One of the most common errors I am seeing in the data since the webinar is people entering exit dates into the future. **This is not allowed** for the following reasons:

1. You can't 100% know the exact exit date or their Destination or Reason for Leaving before they've exited.
2. Especially now with the new requirement to enter Housing Status at Exit, it would be impossible to save the Ohio HPRP Exit assessment for each household member because you have to save that data backdated to match the Exit Date. ServicePoint does not allow you to backdate to a future date. This means in order to properly exit a client, you must do it on the day or after they actually are exiting.
3. Future-exiting could prevent you from knowing who needs recertifications. If you search for the "Stayers" who have been in your program for three months and you have entered a future exit date, these people may show as "Leavers", depending on how you run the report.
4. It's best practice to exit clients accurately and as soon as possible. With the HEARTH legislation coming down soon, something that will be scrutinized is your Length of Stay averages. If you are guessing on exit dates, it is likely to falsely elevate your Length of Stay averages.
5. Grant managers looking at your files will not understand why you're exiting some clients on a date in the future and leaving some clients without an exit date. It is inconsistent.

Another point of confusion is the backdating. If you remember that the "HPRP" assessment gets an assessment date that matches the Entry date (because you save that at entry) and that the "OH HPRP Exit" assessment gets an assessment date that matches the Exit Date (because you save that at exit), you will do fine.

Changes are always difficult especially when they amount to more data entry than before. I appreciate all your patience and good humor through this change. **Please download the new HPRP Workflow** (color or bw) from the COHHIO website and keep me updated on your ideas and questions!

Comments, questions, and feedback are welcome. If you would like to not receive "HPRP HMIS Topic of the Week" anymore, or would like to be included, please email genelledenzin@cohhio.org.