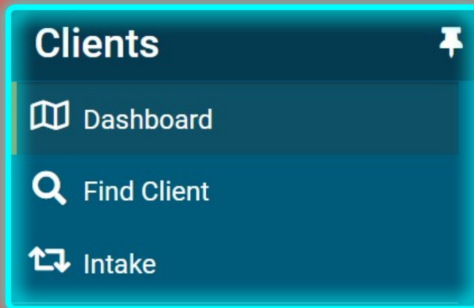


EP/CAA/CRA HMIS PROCESS

1

INTAKE/ENROLLMENT



- **Make sure you are in the “Clients” workspace and click on “Intake” in the top left-hand corner**
- **Client Basic Information**
 - **Search to make sure the client is not already in HMIS**
- **Client Family Information**
 - **Add all family members within the current household**
- **Project Enrollment**
 - **Enroll in the project PVT/HP/CAA ERA Eviction Prevention/UWDC**
- **Universal Data Assessment**

SERVICES

2

- **Click on “Enrollment and Services,” then “Services,” then “Add New Service**
- **Choose the PVT/HP/CAA ERA Eviction Prevention/UWDC enrollment**
- **Add Services with exact dollar amounts for all types of assistance**
 - **Rent/mortgage assistance**
 - **Utility assistance**
 - **Hotel stays**

A screenshot of a form titled 'Add New Service'. The form has the following fields and values: 'Enrollment' is a dropdown menu with '11/02/2021 - CAA-ERA | United Way Denton' selected; 'Grant' is a dropdown menu with '- SELECT -' selected; 'Service' is a dropdown menu with 'Utility Bill Assistance' selected; 'Date' is a date field with '11/04/2021' and a calendar icon; 'Units Of Measure' has three radio buttons: 'Dollars', 'Minutes', and 'Count' (which is selected); 'Units' is a text input field with '1.00'; 'Unit Value' is a text input field with '\$100.00'; and 'Total' is a text input field with '\$100.00'.