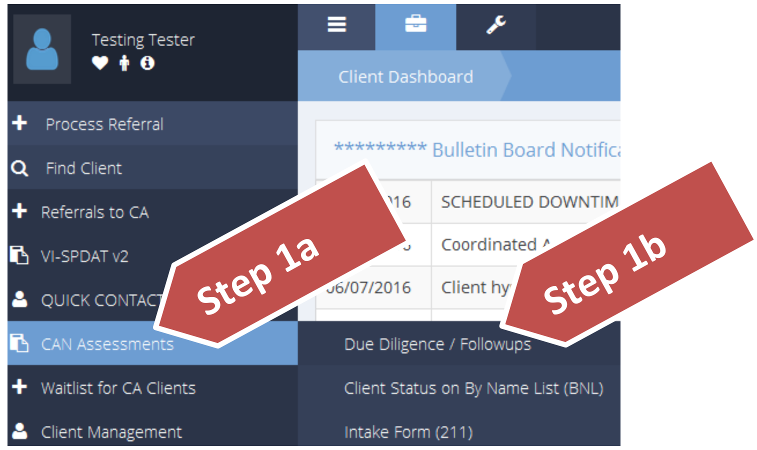
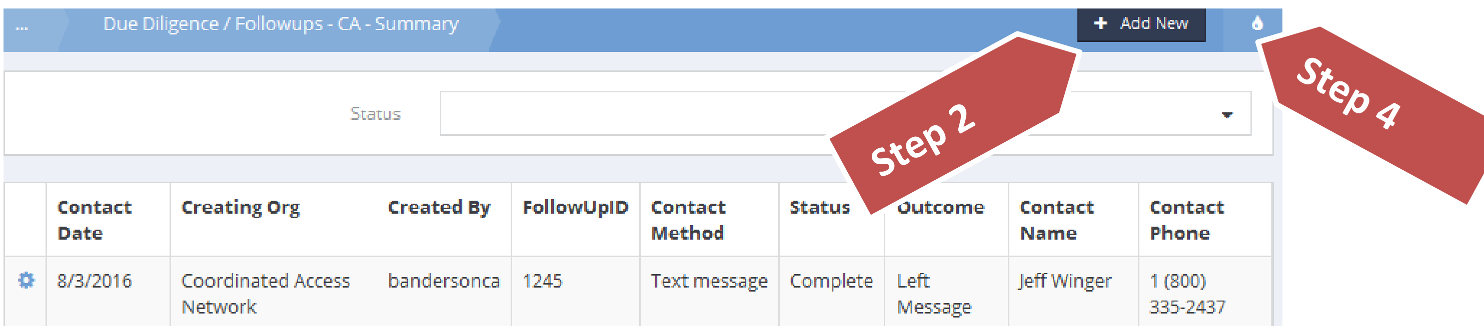
Recording Due Diligence Contacts in HMIS (August 2016)

Step 0: Log in to HMIS and find the client whose record you will update.

Step 1a: Click on CAN Assessments in the left-hand menu.
Step 1b: In the submenu, click on Due Diligence / Followups

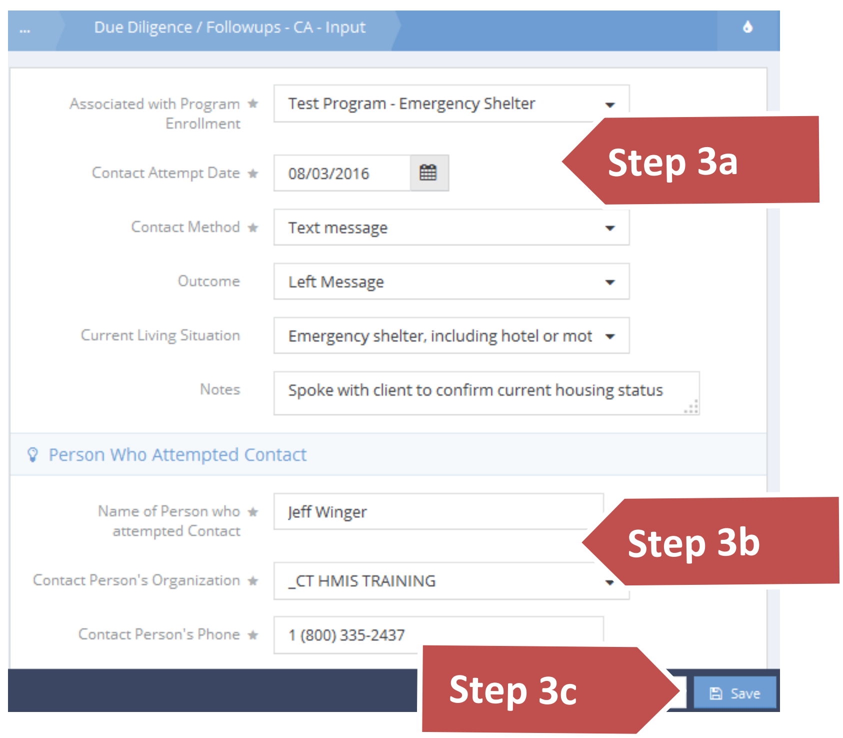


Step 2: The screen below will appear with a summary of Due Diligence / Followups already recorded (if any). To record a NEW contact or attempted contact with a client, click the Add New button in the top right corner of the screen.



Step 3a: Complete the information on the form to describe the outcome of the contact or attempted contact.
Step 3b: Enter information about the person who made the contact or attempted to make contact with the client.
Step 3c: Click the Save button in the bottom right corner.

Step 4: You will be returned to the screen from Step 2, and will see the new contact attempt listed. To export an Excel file of all due diligence contacts for this client, click on the teardrop in the top left corner of this screen and select the Excel icon.



Prepared by DOH 8/3/2016.