

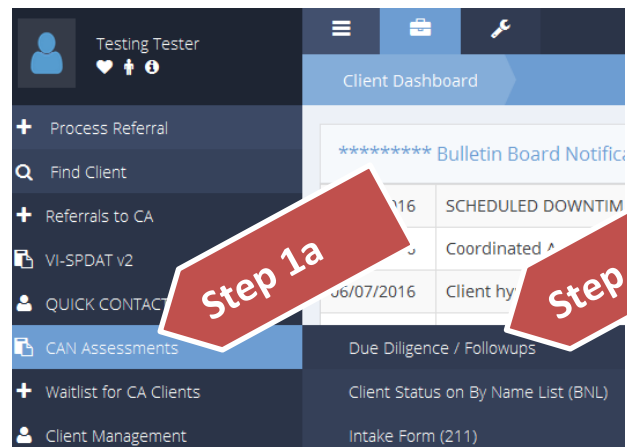
RECORDING DUE DILIGENCE CONTACTS IN HMIS (AUGUST 2016)

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.



Due Diligence / Followups - CA - Summary

Status

[+ Add New](#)

Contact Date	Creating Org	Created By	FollowUpID	Contact Method	Status	Outcome	Contact Name	Contact Phone
8/3/2016	Coordinated Access Network	bandersonca	1245	Text message	Complete	Left Message	Jeff Winger	1 (800) 335-2437

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.

Due Diligence / Followups - CA - Input

Associated with Program Enrollment: Test Program - Emergency Shelter

Contact Attempt Date: 08/03/2016

Contact Method: Text message

Outcome: Left Message

Current Living Situation: Emergency shelter, including hotel or mot

Notes: Spoke with client to confirm current housing status

Person Who Attempted Contact

Name of Person who attempted Contact: Jeff Winger

Contact Person's Organization: _CT HMIS TRAINING

Contact Person's Phone: 1 (800) 335-2437

[Save](#)