**NEW Client Workflow**

Agency enters a entry/exit and assigns themselves a case manager to identify that they are working with client. If you have ROI you can enter now. However, please be aware an ROI will be required to be recorded for all household members

Client and household is exited from program if no additional services are needed. Case Manager exited themselves as case manager

Case Manager should discuss any available options with client to address need.

Client and household is exited for program with reason for leaving listed as “Ineligble for program” Case manager exited themselves as case manager

Client is ineligible for service under Pasco Heart.

Agency Case Manager meets with client. Finishes /completes entry/exit to include all family members. Entering information based on the supplied documentation.

Record ROI for household. Anyone over 18 will need their own.

All documentation is required prior to any services being entered

Client Application Received through portal

Referral sent to agency

Client is eligible for service under Pasco Heart.

Service is entered with funding source and amount.

Client’s Need / in Service transitions screen is closed

Agency contacts client to setup appointment and request documentation

Agency reviews HMIS to ensure client doesn’t already have **open program entry** and isn’t working with other agency.

If client has **open entry/exit** into program. Client should be referred back to that agency and case manager.