# Handling Deletions in HMIS

*There are multiple reasons why a deletion request may be desired.*
*In this document, we'll discuss the reasons why a deletion may be requested and how to address them.*

## Enrollment Deletion

### Accidental Enrollment

- A client is accidentally enrolled into a program due to a data entry error.

#### Fix:

- Submit a 'Delete Enrollment' issue ticket to the HMIS Team letting us know that the enrollment was created by accident/data entry error and the HMIS Team will delete the enrollment.

### Enrollment into the Wrong Program

- A client is accidentally enrolled into the wrong program (funding source or project type)

#### Fix:

- Submit a 'Change Enrollment Program' issue ticket to the HMIS Team letting us know that the enrollment needs to be changed from one program to another.
    - Please include:
        - Current Project Name
        - Enrollment Date(s)
        - Project Name to update it to

### Post Enrollment Updates

- Once the HMIS Team completes the update/flip of an enrollment to the correct project type, it is important to go through the entry and exit assessments to ensure that any project specific questions are updated accordingly.
- To complete this update, find the client and navigate to the client's dashboard.
- Scroll down to the 'Enrollments' section of the dashboard.
- Click on the action button (3) dots next to the enrollment.
- For Entry Assessment updates, click on the 'Edit Enrollment Workflow' option from the list.
- For Exit Assessment updates, click on the 'Exit the Enrollment' option from the list.
- Please complete updates to the assessments to reflect the changes made to the enrollment.

## Overlapping Enrollment

- Overlapping enrollments can occur from the merge of duplicate client records and errors in data entry. Overlapping enrollments occur when a client is entered into the same project more than once, with enrollment dates that overlap. You can spot these in the 'Enrollments' section of the client's dashboard.

## Fix:

- Submit a 'Delete Overlapping Enrollment' issue ticket to the HMIS team letting us know the enrollment that needs to be deleted.
    - Please include:
        - Impacted Client ID
        - Name of Project Enrollment to be deleted.
            - Enrollment Dates of the Enrollment to be deleted.
            - Are there any services, assessments, SALA/TPST, or current living situation tied to the enrollment [to be deleted] that need to be tied to the remaining enrollment?
        - Correct enrollment details
            - Do the project entry date/exit date need to be changed to reflect client's participation in the project?
                - Note: This will require updates to the entry/exit assessment dates
            - Are the assessments tied to the remaining enrollment the most accurate to the client's situation?

## Post Enrollment Updates

- Once the HMIS Team completes the deletion of an overlapping enrollment, it is important to go through the entry and exit assessments to ensure the date of entry/exit assessments are updated and align with any changes in entry/exit date.
- To complete this update, find the client and navigate to the client's dashboard.
- Scroll down to the 'Enrollments' section of the dashboard.
- Click on the action button (3) dots next to the enrollment.
- For Entry Assessment updates, click on the 'Edit Enrollment Workflow' option from the list.
- For Exit Assessment updates, click on the 'Exit the Enrollment' option from the list.
- Please complete updates to the assessments to reflect the changes to enrollment entry/exit dates.

### Update any Orphaned Services/CE Events

- Find client and navigate to the client’s dashboard.
- Click on the ‘Enrollment and Services’ folder on the navigation bar and then click on the ‘Services’ or ‘CE Events’ menu option.
- Logged in as the creating organization, locate the service in question that needs to be modified.
- Click on the edit button (pencil & notepad) next to the impacted service or CE Event.
- On this page, you change the enrollment and/or any other properties of the service.
- Click the ‘Save’ button when updates are completed.

### Tie any Current Living Situations

- Find client and navigate to the client’s dashboard.
- Click on the ‘Add Current Living Situation’ folder on the navigation bar and then click on the ‘Current Living Situation’ menu option.
- Logged in as the creating organization, locate the service in question that needs to be modified.
- Click on the edit button (pencil & notepad) next to the impacted current living situation.
- On this page, you change the current living situation and map it to the correct enrollment.
- Click the ‘Save’ button when updates are completed.

### Tie any Orphaned Referrals

- Find client and navigate to the client’s dashboard.
- Click on the ‘Enrollment and Services’ folder on the navigation bar and click on the ‘Referrals’ menu option.
- Logged in as the creating organization, locate the referral in question that needs to be modified.
- Click on the action button (3 dots) next to the impacted referral and click on the ‘Edit Referral’ option from the list.
- On this page, you change the referral and/or any other properties of the referral.
- Click the ‘Save’ button when updates are complete.

# Services Deletion

## Accidental Creation of Services

- A service can accidentally be added to a client's enrollment due to a data entry error.

### Fix:

- Submit a 'Delete Service' issue ticket to the HMIS team letting us know the service that needs to be deleted.
    - Please include:
        - Impacted Client ID
        - Service Details:
            - Date of Service
            - Program Name
            - Service Name
            - Service ID
        - Reason for service deletion

## Service isn't attached to the Correct Enrollment

- A service isn't tied to the correct HMIS Project enrollment.

### Fix:

- Find client and navigate to the client's dashboard.
- Click on the 'Enrollment and Services' folder on the navigation bar and then click on the 'Services' menu option.
- Logged in as the creating organization, locate the service in question that needs to be modified.
- Click on the edit button (pencil & notepad) next to the impacted service.
- On this page, you change the enrollment and/or any other properties of the service.
- Click the 'Save' button when updates are completed.

# Referral Deletion

## Accidental Creation of Referral

- A referral can accidentally be created for a client due to a data entry error.

### Fix:

- Submit a ‘Delete Referral’ issue ticket to the HMIS team letting us know the referral that needs to be deleted.
  - Please include:
    - Impacted Client ID
    - Referral Details:
      - Date of Referral
      - From Provider
      - To Provider
      - Referral Name
    - Reason for referral deletion

## Referral Updates

- A referral wasn’t entered for the correct referral service, tied to the correct enrollment, and/or correct refer to provider.

### Fix:

- Find client and navigate to the client’s dashboard.
- Click on the ‘Enrollment and Services’ folder on the navigation bar and click on the ‘Referrals’ menu option.
- Logged in as the creating organization, locate the referral in question that needs to be modified.
    - Click on the action button (3 dots) next to the impacted referral and click on the ‘Edit Referral’ option from the list.
    - On this page, you can change the referral and/or any other properties of the referral.
    - Click the ‘Save’ button when updates are complete.

# Any Other Deletion Requests

## Accidental Creation

- Any other items in the HMIS that need to be deleted for a client.

### Fix:

- Submit an issue ticket to the HMIS team letting us know what needs to be deleted.
    - Please include:
        - Impacted Client ID
        - Details of the item to be deleted:
            - Date associated
            - Name/type of item
            - Any other details
        - Reason for deletion

## Updates

- Any other items in the HMIS that may need to be updated for a client.

### Fix:

- If unsure on how to update the item, submit an issue ticket to the HMIS Team and we'll be happy to help you with next steps.