

How to Disassociate Client(s) from Your Agency

Step by Step Guide for Agency
Administrators

Objective

- Agency Administrators will learn how to disassociate client(s) from their own agencies.

NOTE: Users that are not Agency Administrators will not have access to this page.

Why Disassociate Client(s) from Your Agency

- On the Data Integrity report, clients will be counted as ‘Clients Waiting for Enrollment’ if the client has been added to your Organization but an enrollment has not been created for the client.
- Disassociating the client from your agency means the client is no longer added to your organization, and the client will not be counted as waiting for enrollment.

Agency-wide Intakes and Enrollments	#
Client Intakes Completed [Created and Enabled Clients in Central Intake]	79
Clients Enrolled into the Agency's Program	56
Clients Waiting for Enrollment	23

Go to Disassociate Clients Page

1. Log-in to HMIS.
2. Go to Your OC_Mark For Delete role.
3. Select the Disassociate Clients page.



Disassociating Clients from Agency

4. Enter client's first name, last name, ID, Identifier, or Household ID in the search field.
5. Click on the Search button.

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The screenshot shows a web application window titled "Disassociate Clients". At the top, there is a search bar with five input fields labeled "First Name", "Last Name", "ID", "Identifier", and "HouseholdID". A red box highlights these five input fields, with a red "4" to its left. To the right of the input fields is a "Search" button, also highlighted with a red box and a red "5" to its right. Below the search bar is a table with columns: "FirstName", "LastName", "DateOfBirth", "Identi", "Organization", "ID", "MID", "SecurityID", and "Securi". The table is currently empty. At the bottom right of the window, there is a button labeled "Disassociate Org".

Disassociating Clients from Your Agency

6. All clients that meet the search criteria you entered will appear on the left hand grid.
7. Select client(s) from grid.
8. Select your organization on the right (you will only be able to disassociate clients from your own agency).
9. Click on the Disassociate Org button.

The screenshot shows a software interface with two main panels. On the left is a grid of client records with columns for First Name, Last Name, and Date of Birth. On the right is a panel for selecting an organization, with columns for Organization, ID, MID, and SecurityID. A 'Disassociate Org' button is located at the bottom right of the organization panel.

First Name	Last Name	DateOfBirth
Xxhappy	Xxhour	5/18/1982
Xxhar	Xxrom	4/27/2016
Xxharold	Xxgreen	9/9/1995
Xxharry	Xxpotter	6/10/1991
Xxharry	Xxsmith	1/1/1985
Xxharry	Xxstyles	1/1/1900
Xxharry	Xxstyles	3/1/1989
Xxhector	Xxdoe	3/15/2002
Xxhector	Xxventura	10/20/1962
Xxhector	Xxventura	3/23/1993
Xxheidi	Xxfrank	5/2/2000
Xxhelena	Xxrosales	4/7/1974
Xxhello	Xxhello	1/1/2013
Xxhello	Xxkitty	1/31/1954
Xxhello	Xxkitty	3/1/1966
Xxhello	Xxsaturday	3/8/1987
Xxhelp	Xxhelp	8/15/1958
Xxhelp	Xxlopez	11/11/1997

Organization	ID	MID	SecurityID
OC_OCP	1893157	20486177	17751

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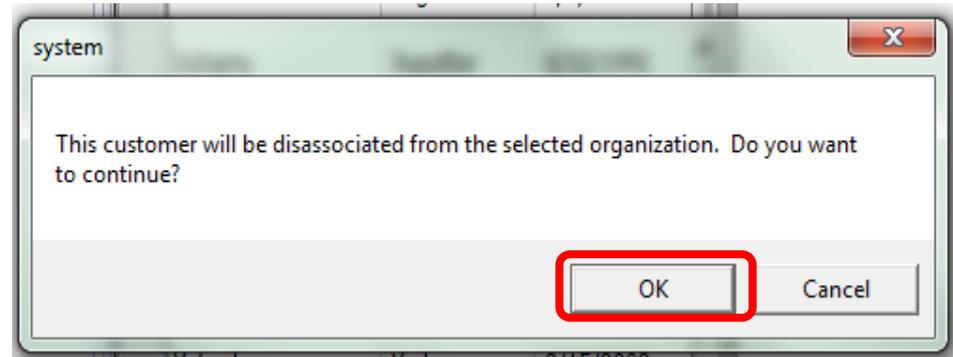
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Disassociate Org

Disassociating Clients from Your Agency

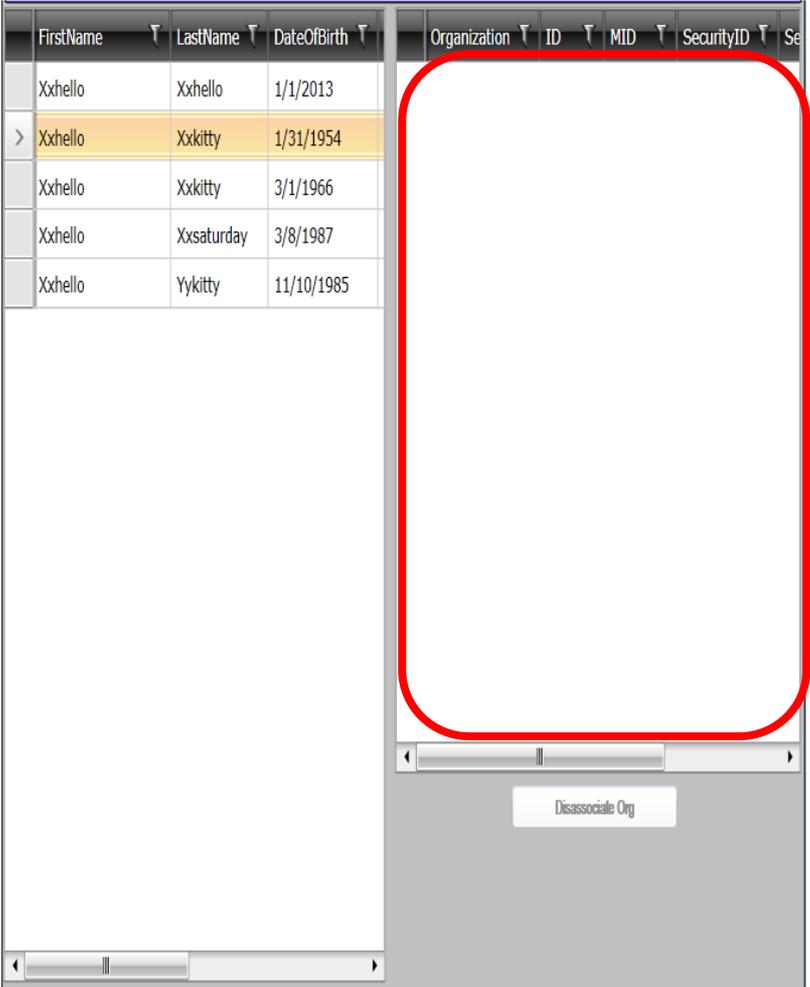
10. A prompt will pop up “This customer will be disassociated from the selected organization. Do you want to continue?” Select the Ok button to disassociate the client.



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Disassociating Clients from Your Agency

11. The client(s) selected are no longer associated with your agency. The agency container will be empty if the client is not associated with your agency.



FirstName	LastName	DateOfBirth	Organization	ID	MID	SecurityID	Se
Xxhello	Xxhello	1/1/2013					
> Xxhello	Xxkitty	1/31/1954					
Xxhello	Xxkitty	3/1/1966					
Xxhello	Xxsaturday	3/8/1987					
Xxhello	Yykitty	11/10/1985					

Disassociate Org

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Questions

- Any questions, feel free to email HMIS Helpdesk at hmis-helpdesk@211oc.org