LTHSSF NAVIGATOR PILOT WORKFLOW
HMIS DATA ENTRY INSTRUCTIONS

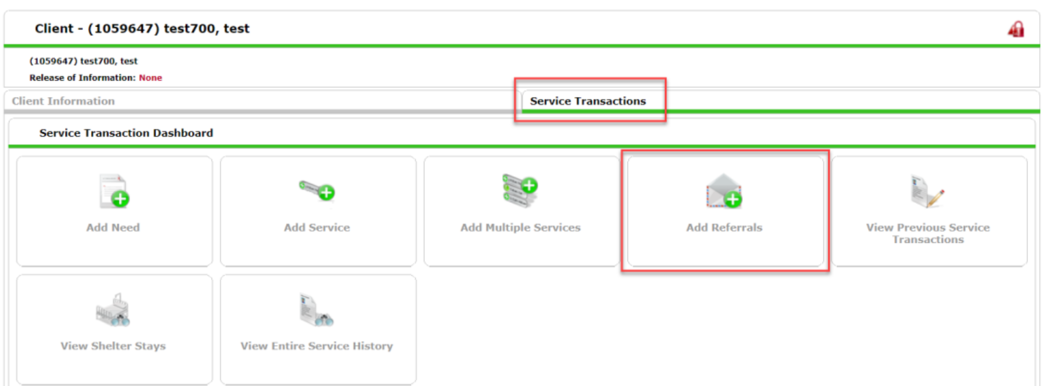
Last Updated: February 6, 2018
Primary Audience: LTHSSF Navigator Case Manager; CES Priority List Managers

REFERRING A CLIENT TO THE NAVIGATOR RESPONSIBLE: PRIORITY LIST MANAGER

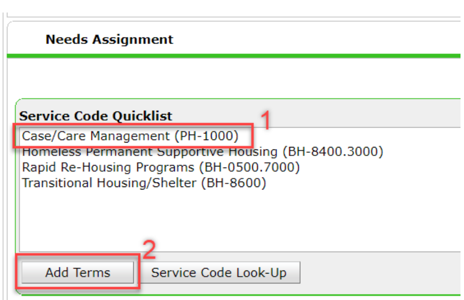
1. Upon logging into ServicePoint, EDA to your corresponding Priority List provider (if you are not already there):

Hennepin Singles	4363
Ramsey	4203
SMAC	4138

2. Navigate to the record of the client you intend to refer.
3. Click on **Service Transactions**.
4. Click on **Add Referrals**.



5. From the Service Code Quicklist, select **Case/Care Management (PH-1000).** And Click **Add Terms**.

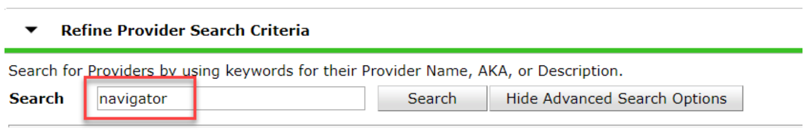


NOTE: You won't see anything really happen when you do this until you scroll further down the page.

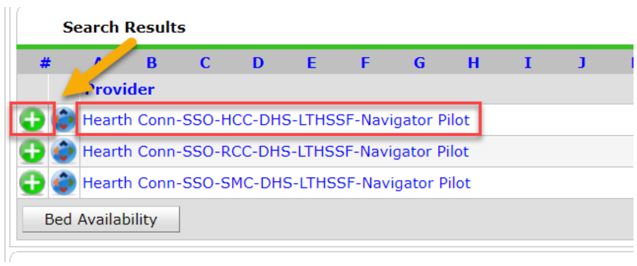
6. The next step varies depending on your CoC:

HENNEPIN:

a. Under **Refine Provider Search Criteria**, search for the relevant Navigator Provider, by inputting "navigator" into the Search box.

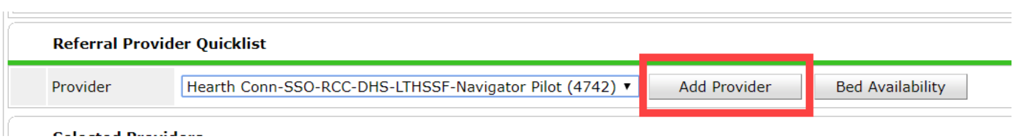


b. From the Search Results, select the HCC Navigator Pilot provider by clicking on the green plus.

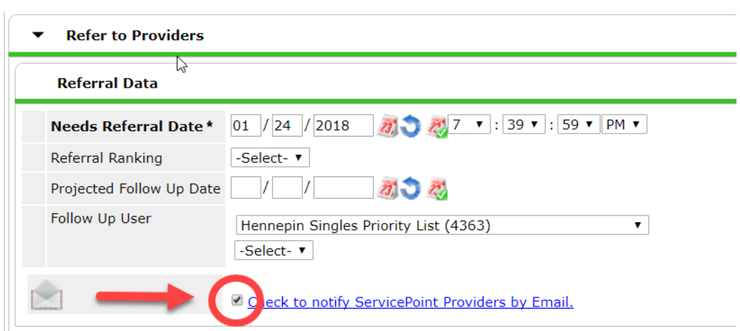


RAMSEY/SMAC

a. Under Referral Provider Quick List, select the Navigator Pilot provider. Click **Add Provider**.



7. Under Referral Data, Select the box for "Check to notify ServicePoint Providers by Email".



NOTE: This is step extremely important!!! Checking this box will generate an automated notification email to the Navigator Case Manager that a referral is waiting for them.

8. Click **Save All** at the bottom of the page.

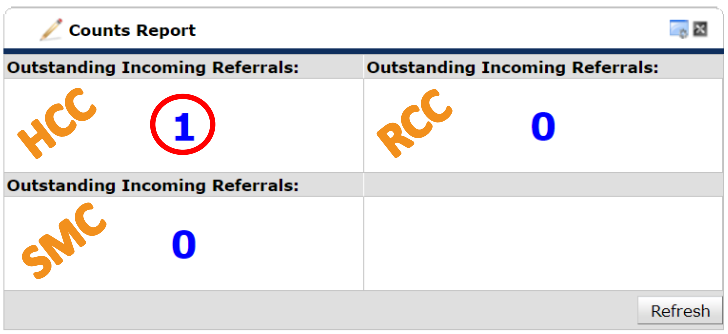
IF YOU ACCIDENTALLY MADE A REFERRAL IN ERROR

1. Priority List manager must contact Helpdesk immediately and request they delete the associated Service Transactions.
    a. CC the Navigator to keep them in the loop!

LOCATING CLIENT'S RECORD IN HMIS — RESPONSIBLE: NAVIGATOR

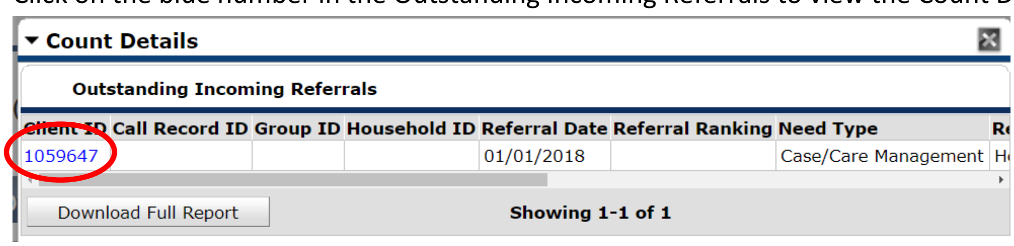
<u>These directions apply to clients who have consented to statewide data sharing only. If you receive a client ID and you are unable to locate them in HMIS, please contact the Helpdesk.</u>

9. Upon receiving the automated email from ServicePoint, notifying you of a new referral, login to ServicePoint.
    a. On your Home Page Dashboard, you will see the Counts Report.



Note: The boxes are in alphabetical order (since it's not possible to actually change their titles).

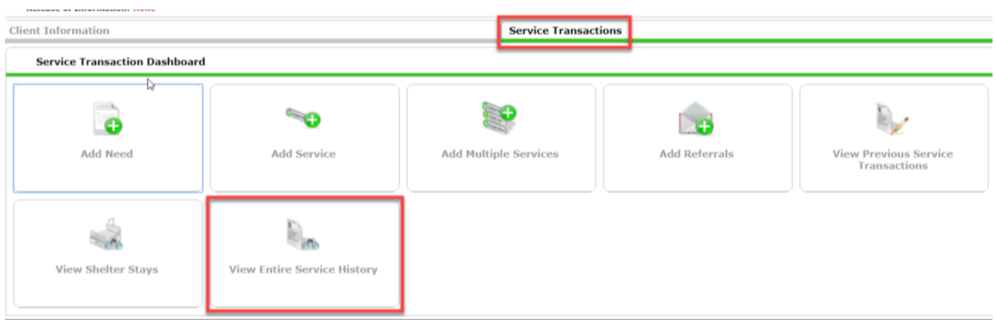
10. Identify from which CES the incoming referral coming.
11. Click on "Enter Data As" (EDA) and select the provider that pertains to the region the referral is coming from.
    a. Hennepin: Hearth Conn-SSO-HCC-DHS-LTHSSF-Navigator Pilot **(4733)**
    b. Ramsey: Hearth Conn-SSO-RCC-DHS-LTHSSF-Navigator Pilot **(4742)**
    c. SMAC: Hearth Conn-SSO-SMC-DHS-LTHSSF-Navigator Pilot **(4743)**
    d. Click on the blue number in the Outstanding Incoming Referrals to view the Count Details:



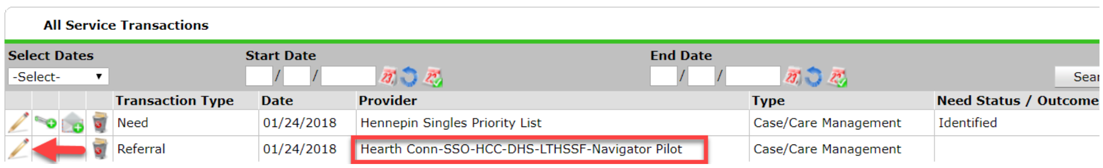
    e. Click on the Client ID to navigate to the client record.

PROVISIONALLY ACCEPTING A REFERRAL — RESPONSIBLE: NAVIGATOR

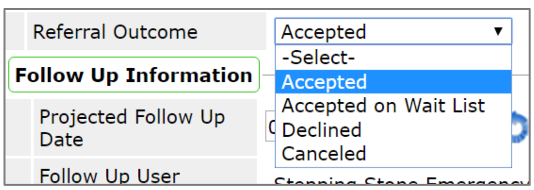
1. Click on **Service Transactions.** Then, click on **View Entire Service History.**



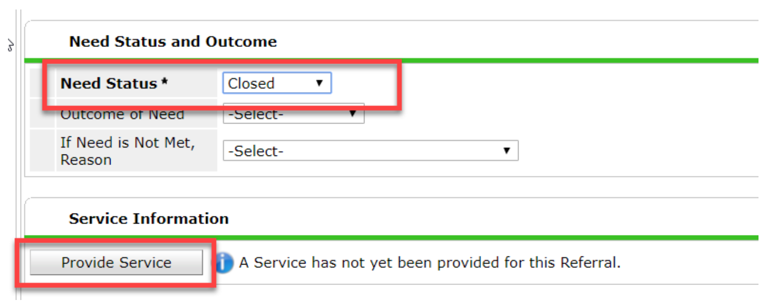
2. If the Entire Service History is extremely lengthy, you can then click on the Referrals tab to narrow down to those specific transactions.
3. Locate the Navigator Pilot **Referral**. Click on the Edit Pencil.



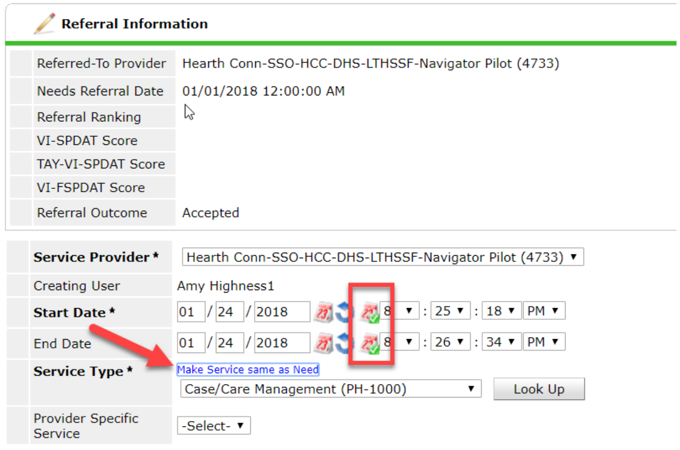
4. Change Referral Outcome to Accepted.



5. Change the Need Status to **Closed.** Then, click on **Provide Service.**



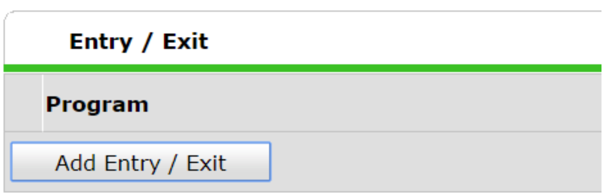
6. Under Referral Information, update the Start and End dates by hitting the little calendars with the green check. Then, click on **Make Service same as Need. The Service Start Date here indicates the date the client was provisionally accepted into the Pilot.**



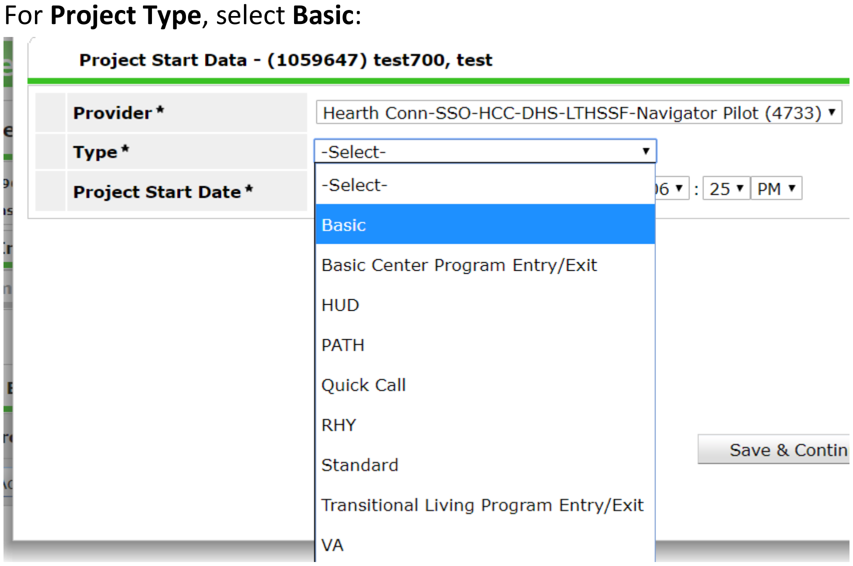
7. Click **Save & Continue.**
8. Upon clicking Save & Continue, a new screen will load with a lot of different sections to add content. You can skip everything.
9. Click on **Save & Exit**.
10. You have now provisionally accepted the referral!

CREATING AN ENTRY/EXIT RECORD RESPONSIBLE: NAVIGATOR

1. Navigate to Client Record. In the **Enter Back Date** pop-up, enter the date on which you official started working with the client. If the start date is going to be the current date, you are not required to enter a back-date.
2. Click on the **Entry/Exit** tab. Select **Add Entry/Exit**:

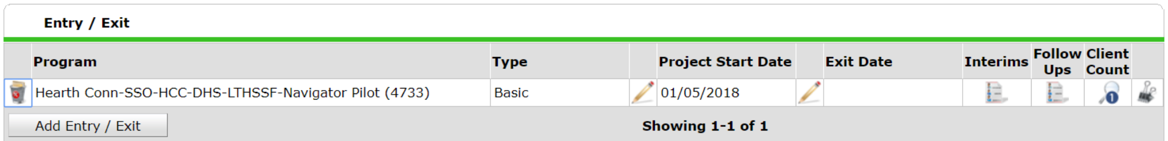


3. For **Project Type**, select **Basic**:



Note: As you will see, there is not an Entry Assessment associated with this program.

4. **Project Start Date** will be pre-populated with the date you already backdated to (or current date if you didn't backdate).
5. The **Entry/Exit Data** pop-up will display. Simply navigate to the bottom and hit **Exit**.
6. You will see the new Entry/Exit record for your client:



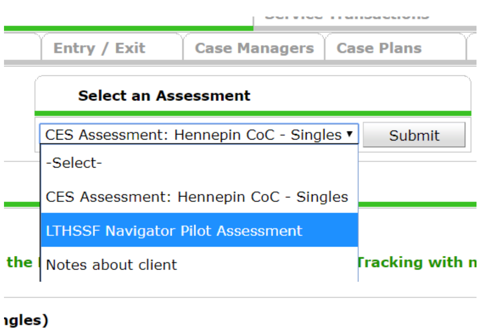
UPDATING CES ASSESSMENT DATA RESPONSIBLE: NAVIGATOR

1. Click on the **Assessments** tab.
2. If you are EDA'ed to the proper provider, the corresponding CoC CES Assessment should automatically be populated on your screen.
3. Review sections and make necessary revisions/updates.

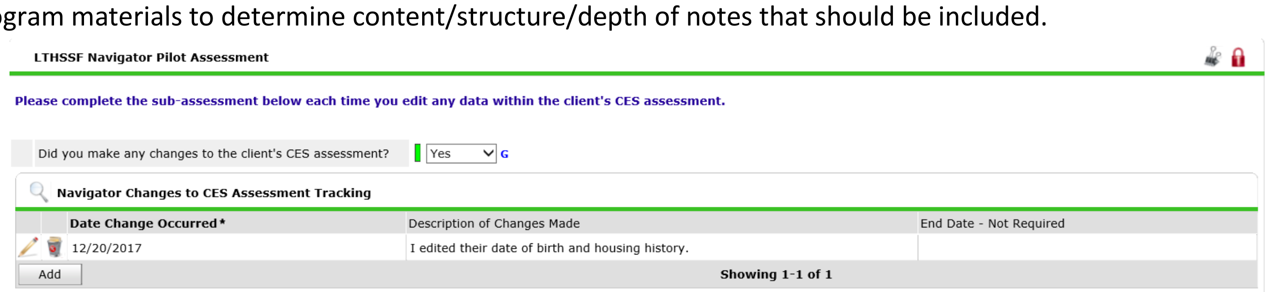
COMPLETING LTHSSF NAVIGATOR PILOT ASSESSMENT RESPONSIBLE: NAVIGATOR

Upon making changes to any areas of the CES Assessment, you must also complete the LTHSSF Navigator Pilot Assessment! This should be done each time you revisit the CES Assessment.

1. On the **Assessments** tab, **select LTHSSF Navigator Pilot Assessment** and hit **Submit**.



2. Input a description of what you edited in the CES Assessment. This is a free-form text box. Please refer to internal program materials to determine content/structure/depth of notes that should be included.



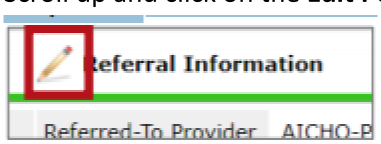
Client is Not Proceeding in the Program

NOTE: In this scenario, the Navigator has determined that the client is not eligible for the program, either after an initial communication or due to not being able to reach the client at all.

1. EDA to the proper provider
2. Open the client's record.
3. Do not backdate.
4. Click on the **Service Transactions** tab.
5. Click on "View Entire Service History" to bring you to the **Entire Service History** tab.
6. Click on the Edit Pencil to the left of the associated service you had added for Case & Care Management.
7. Change the **End Date** of that service to today's date. (This will allow us to report on the date you declined the referral. It is important to decline the referral in HMIS as soon as possible to alert your Priority List Manager(s) that you were unable to house the client so that the client can be considered for new housing opportunities.)

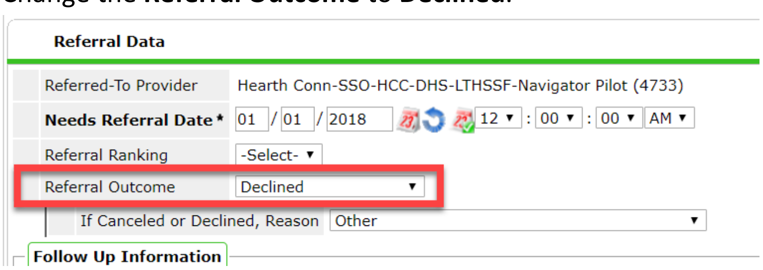
8. Scroll down and click on **Save** (easy to miss!)

9. Scroll up and click on the **Edit Pencil** to the left of Referral.



10. Click on the **Edit pencil** for the Referral.

11. Change the **Referral Outcome** to **Declined**.



12. For **Reason,** select one of the following options from the Picklist:

Client disappeared or unreachable
Client found housing (self-resolved)
~~Client is eligible, but provider unable to accept~~
~~Client is not eligible~~
Client moved outside of CoC
Client placed in institutional setting

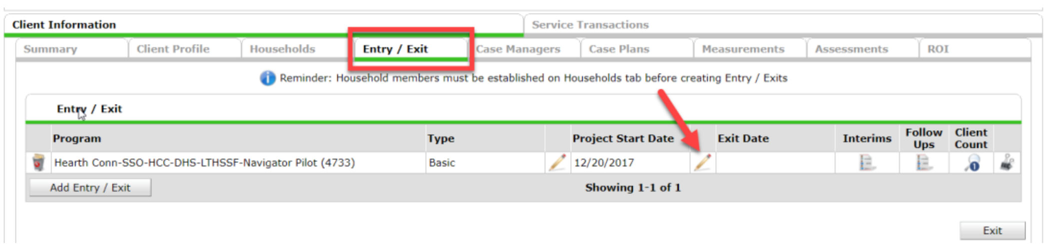
~~Client refused service and not returned to list~~
Client Refused Service and returned to list
~~Client is Out of shelter~~
~~Unable to locate housing~~
Deceased
~~Unknown~~
Other

13. Click on **Save and Exit**.
14. Navigator will send email (outside of HMIS) to appropriate Priority List Manager to inform them that referral has been cancelled/declined.

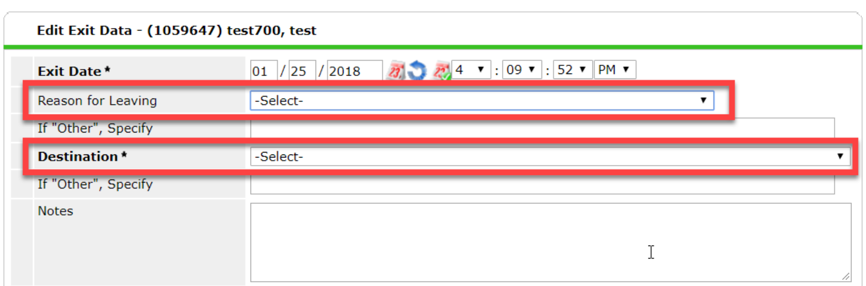
<u>Enrolled Client is Exiting the Program</u>

NOTE: In this scenario, the client was enrolled (an Entry/Exit record was created). They are now officially done with the program.

1. Navigate to the **Entry/Exit** tab and click on the **Edit pencil** next to the **Exit Date** column.



2. Complete **Reason for Leaving** and **Destination**.



a. For **Destination**, if the client has been connected to long-term case management in a housing program, select the option that best describes the type of program they are now a part of. In many/most instances, they will not actually be housed yet.

   For example, if they are now connected to a Permanent Supportive Housing program (but not yet officially housed), you would select “Permanent housing (other than RRH) for formerly homeless persons”.

b. For **Reason for Leaving**¸ use one of the following options from the picklist:

Completed program*
* Referred to housing through CES
~~Non-payment of rent~~

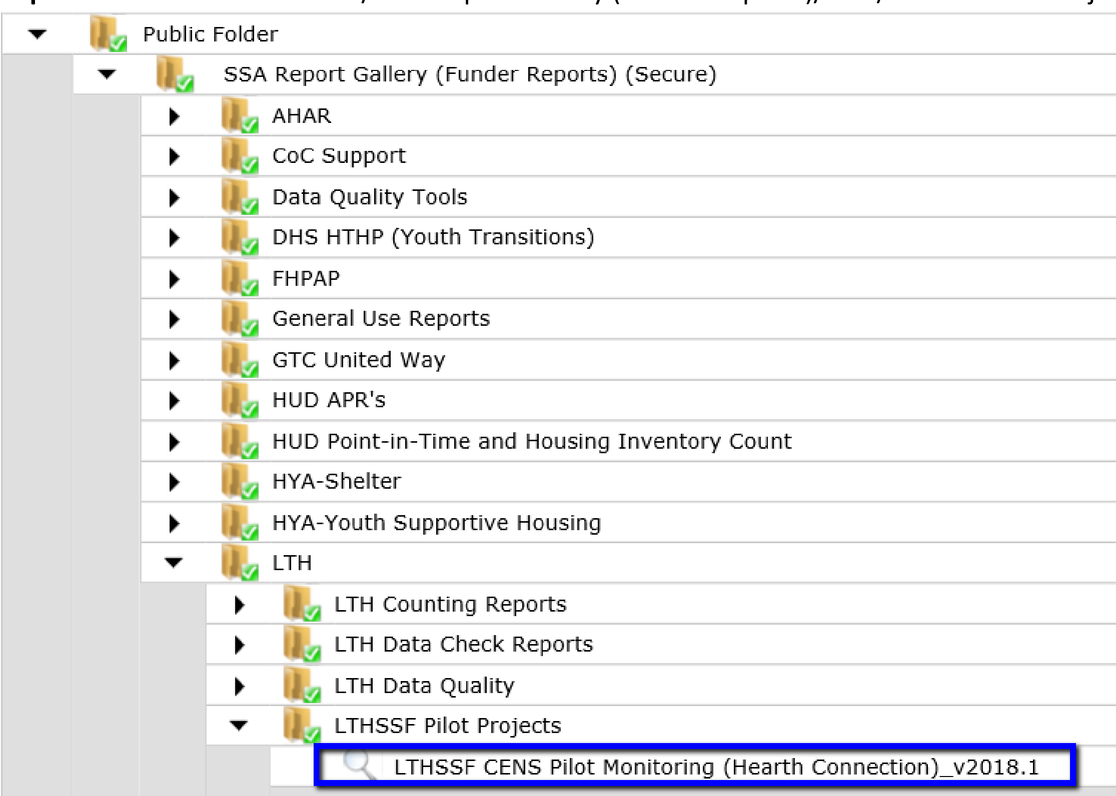
~~Reached Maximum Age Allowed~~
~~Reached maximum time allowed~~
~~Criminal activity / violence~~
Voluntarily Withdrew From Program*
* Doesn't want to work with CENS anymore (inc. moving out of service area)
Left for Housing Opportunity Before Reaching Maximum Time Allowed*
* Goes to other placement outside CSE (e.g., nursing home, adult foster care, etc)
~~Non-compliance with program~~
Unknown/Disappeared
~~Needs could not be met~~
Death
Other*
*e.g., participant handed off to other supportive services who are committed to working with participant until referral and navigator will no longer work with participant; safety concern for CENS staff

3. Click **Save & Continue.**
4. Navigator will send email (outside of HMIS) to appropriate Priority List Manager to inform them that client has been exited from the program.

REPORTS

Report Name: LTHSSF Hearth Navigator Pilot Monitoring Report

Report Location: Public Folder/ SSA Report Gallery (Funder Reports)/ LTH/ LTHSSF Pilot Projects



Report Audience and Objective:

- ***Hearth Connection*** can run this report to review the clients referred to and served by the pilot program in the date range. They can also review what types of changes were made to the CES Assessment.
  Priority List Managers can run this report to review the clients referred to and served by the pilot program from their CoC.
- ***CES Navigator Case Managers*** can use this report to review data quality and clients referred to and served by the pilot program. They can also review the changes they recorded they made to the CES Assessment.

Tabs

1. **Summary:**
   a. *Referral Outcomes* – Displays count of clients referred to the program from each of the metro CoCs.
   b. *Clients Served* – Displays count of clients with Entry Exits into the program from each CoC.

2. **Referral Detail:**

LTHSSF Navigator Pilot

Referral Detail

Report Dates: 10/1/2017 - 1/26/2018

Table/Report Information
The table below pulls referrals made to the Hearth Connection LTHSSF Navigator Pilot provider.

Error Key		
Data Element	**Error**	**Cause**
Referral Outcome	Missing	Referral Outcome field on the Referral is blank.
Provider Accepting Referral	No service created.	No case management service created.
Date of Provisional Acceptance	No service created.	No case management service created.
Decline/Cancellation Referral Reason	Missing	Reason for Declining/Cancelling field on the Referral is blank.
Entry Exit Created?	Check	Entry Exit to Navigator Pilot possibly missing - Referral Accepted, but not Entry Exit created.

3. **EE Detail**

LTHSSF Navigator Pilot

EE Detail

Report Dates: 10/1/2017 - 1/26/2018

Table/Report Information
The table below pulls Entry Exits to the Hearth Connection LTHSSF Navigator Pilot provider.

Error Key		
Data Element	**Error**	**Cause**
Entry Exit Exit Destination	Missing	Exit Destination field is missing.
Entry Exit Reason Leaving	Missing	Reason for Leaving field is misisng.

4. **Change Detail*** *Description of changes only visible to Hearth Connection*

LTHSSF Navigator Pilot

Change Detail

Report Dates: 10/1/2017 - 1/26/2018

Table/Report Information

This table pulls the description of changes made to CES Assessment for clients in the Navigator Pilot.

	Entry Exit Entry Date	Entry Exit Exit Date	Did you make any changes to the client's CES assessment?	Description of Changes Made
7	12/27/17		Yes	Updated disability information.

5. **Additional Information**