

HMIS USER GUIDE FOR MN HSG-LTH PROJECTS

Permanent Housing – Housing Only (PH HO) | Permanent Supportive Housing (PSH) | Permanent Housing with Services (PH S) | Supportive Services Only (SSO)

Contents

Data Entry Quick Reference	2
Data Collection Forms	4
Families.....	4
Individuals	4
Program-Specific Data Elements	5
Client Residence	5
Housing Cost.....	7
Housing Subsidy	9
Updating Program-Specific Sub-Assessments.....	10
Self-Sufficiency Outcomes Matrix (SSOM)	12
Reporting Guidelines: Data Quality Reports	14
LTH Data Check Reports	14
Client-Level Matrix Reports.....	18
Reporting Guidelines: Funder-Required Reports	18
Counting and Data Quality Reports (Fiscal-Year Cycle)	19
Matrix Summary Reports (Calendar-Year Cycle)	25
High Priority Homeless (HPH) Eligibility Confirmation Form	28

DATA ENTRY QUICK REFERENCE

THIS SECTION PROVIDES SIMPLIFIED INSTRUCTIONS FOR COMMON DATA ENTRY TASKS. PLEASE REFER TO THE **GENERAL HMIS INSTRUCTIONS** AND UPCOMING SECTIONS OF THIS DOCUMENT FOR FURTHER INSTRUCTION.

CREATE A NEW CLIENT RECORD

1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**.
2. Make sure that the client is not already in HMIS by searching for different combinations of their information.
 - a. If you are provisionally accepting a referral from your CoC's Coordinated Entry System for a housing opening, select your project provider (the project that has an opening the client may be filling at your agency) when entering EDA mode.
3. If no records match, fill out all of the search prompts and click on **Add New Client With This Information**.
 - a. If the client has consented to participate in statewide data sharing, type the word **SHARED** in the **Alias** field. If you have additional questions about verifying and documenting statewide data sharing, [refer to this document](#).
 - b. If receiving a Coordinated Entry referral, you can go directly to the client's record using the client ID given to you by your CoC's Priority List Manager.
4. When prompted, enter the date of the client's entry into the project and select **Set New Back Date**. If the client entered the project today, you can select **Current System Date**. (The date can be changed by clicking on **Back Date** in the top-right corner of the screen.)
 - a. If receiving a Coordinated Entry referral, you do not need to Back Date at this point. Please refer to the steps given in the "CES in HMIS Written Instructions" document for your CoC's workflow.
5. Select the **Client Profile** tab and enter any information missing from the **Universal Profile Assessment**.
 - a. If a client has agreed to statewide data sharing, enter a **Date of ROI Consent**.
6. If the client is being served with other household members, click on the **Households** tab and either add them to an existing household or create a new household.

1. Enter **EDA mode** as the correct provider and open the client’s record in **ClientPoint**.
 - a. If entering data for a household, be sure to search for the head of household.
2. When prompted, enter the date of the client’s entry into the project and select **Set New Back Date**. If the client entered the project today, you can select **Current System Date**. (The date can be changed by clicking on **Back Date** in the top-right corner of the screen.)
3. Click on the **Entry/Exit** tab and select **Add Entry/Exit**. Select **Basic** from the **Type** in the drop-down menu.
 - a. If entering a household, check the box next to each client included in the entry.
4. For each client included in the entry, complete the data elements on the **MN: Ending LTH All-Inclusive Assessment** in the **Entry/Exit Data** pop-up.
 - a. If entering data for multiple household members, save time by clicking on **Add Household Data** and completing the **Household Data Sharing Assessment**.
5. Click on **Measurements Tab**. Select “Add New Measurement”. Complete all domains on an initial **Self-Sufficiency Matrix (SSOM)**.
 - a. The Self-Sufficiency Matrix is required for all adults (18+) in the household. If there are any additional adults in the household, go to their record and complete their SSOM.

UPDATES ARE REQUIRED EVERY 6 MONTHS AFTER PROEJCT START. IN ADDITION, DATA ELEMENTS SHOULD BE UPDATED WHEN A CHANGE OCCURS.

1. Enter **EDA mode** as the correct provider and open the client’s record in **ClientPoint**.
2. Click on the **Entry/Exit** tab, then select the **Interims** icon for the correct Entry/Exit.
3. In the **Interim Reviews** pop-up, click on **Add Interim Review**.
 - a. For updates required every 6 months after entry, select **6 Month Review** for “Interim Review Type.” For updates prompted by a change, select **Update**.
 - b. If serving a household, be sure to include all the applicable household members in the entry by checking the boxes next to their names.
4. Update the following data elements with a correct answer when a change has taken place on the **MN: Ending LTH All-Inclusive Assessment** in the Entry/Exit Interim Review pop-up.
 - a. Head of Household: Update Client’s Residence, Housing Cost and Housing Subsidy Information.
 - b. Head of Household and other adults (18+): Monthly Income, Non-Cash Benefits, Health Insurance, and Y/N data elements.
 - c. All household members: Disabilities
5. Complete this step every 6 months after entry. Click on the **Measurements Tab**. Select **Add New Point of Measurement**. Select **Interim** as the “Point of Measurement”. Complete all domains on the **Self-Sufficiency Matrix (SSOM)**.
 - a. The Self-Sufficiency Matrix is required for all adults (18+) in the household. If there are any additional adults in the household, go to their record and complete their Self-Sufficiency Matrix.

EXIT A CLIENT FROM A PROJECT

1. Enter **EDA mode** as the correct provider and open the client’s record in **ClientPoint**.
2. Click on the **Entry/Exit** tab, then select the **Edit Pencil** next (in the **Exit Date** column) next to the correct entry.
 - a. If exiting a household, be sure to include all applicable household members in the exit by checking the boxes next to their names.
 - b. Enter the correct **Exit Date** and **Destination**, then click on **Save & Continue**.
3. Complete the **Exit LTH Assessment** for each household member.
4. Click on the **Measurements Tab**. Select **Add New Point of Measurement**. Select **Final** as the “Point of Measurement”. Complete all domains on a Final **Self-Sufficiency Outcomes Matrix (SSOM)**.
 - a. The Self-Sufficiency Matrix is required for all adults (18+) in the household. If there are any additional adults (18+) in the household, go to their record and complete their Self-Sufficiency Matrix.

RUN A REPORT

FOR DETAILED INFORMATION ABOUT MN HSG-LTH REPORTS – NAMES, PROMPTS, REQUIREMENTS – REFER TO THE USER GUIDE SECTION TITLED **REPORTING GUIDELINES**.

1. Click on **Connect to ART** in the top right corner of your screen (below Back Date).
2. Run data quality reports on a regular basis (at least quarterly) for MN HSG-LTH, which are located here:
 - a. Public Folder → SSA Report Gallery → 4. State Homeless Programs → MN Housing LTH

NOTE: When running a report, Helpdesk can see the report you SCHEDULE, but we cannot see the reports you VIEW.

DATA COLLECTION FORMS

DATA COLLECTION FORMS FOR MN HSG-LTH PROJECTS CAN BE FOUND BY FOLLOWING THE LINKS PROVIDED BELOW OR VISITING THE [FORMS AND INSTRUCTIONS](#) PAGE ON THE MINNESOTA HMIS WEBSITE. THESE FORMS WILL CHANGE AS NEW DATA STANDARDS ARE RELEASED ANNUALLY ON JULY 1 (MINNESOTA) AND OCTOBER 1 (HUD).

You are not required to use ICA’s data collection forms. Staff responsible for data collection should also be aware that their agency may require them to gather non-HMIS data that is not captured by these forms.

FAMILIES

HOUSEHOLD LTH ENTRY

HOUSEHOLD LTH EXIT

HOUSEHOLD LTH INTERIM

INDIVIDUALS

SINGLE LTH ENTRY

SINGLE LTH EXIT

SINGLE LTH INTERIM

PROGRAM-SPECIFIC DATA ELEMENTS

Program-specific data elements are chosen by your funder and are often unique to the types of projects they fund.

CLIENT RESIDENCE

Data Collected About: Head of Household (Including Singles and Unaccompanied Youth) in Scattered or Site Based Supportive Housing

Data Collection Point: Project Start, Update (as things change or every 6 months), and at Exit

Rationale: To track a client’s residence while enrolled in a specific project.

Data Collection Instructions:

- Record **all** moves that change the Current Residence Status while client is in your project.
- If the client moves, but maintains the same Residence Status, you are not required to add a new entry. (For example, moves from one apartment to another while Residence Status is still Scattered site supportive housing).
- For LTH Highly Mobile Students, the Client Street Address is field is required.
- Client Residence records should cover the entire time a client is in the project, with no gaps and no overlaps.

DATA ENTRY STEP-BY-STEP

1. Confirm you are in EDA mode the correct provider, in the Head of Household’s record, and on the correct assessment (Project Start, Update, or Exit).
2. Click **Add** in the bottom left-hand corner of the **Client’s Residence sub-assessment**.

	Start Date *	Client Street Address	APT #	Client's County	Home Phone Number (optional)	End Date (move-out)	Current Residence Status
	04/01/2016	123 Juniper Lane	22	Ramsey			Scattered site supportive housing
	06/22/2015	444 Lexington Avenue South	202	Ramsey		03/31/2016	Site based supportive housing

Showing 1-2 of 2

3. In the pop-up, answer the applicable data elements. Note **required** elements are highlighted yellow. You are encouraged to fill in as many of the fields as you are able and/or are valuable to your program, however.
 - a. **Start Date:** Enter the date they moved into the residence while enrolled in your project

- b. **Client Street Address**
(Required for LTH Highly Mobile Students only)
- c. **APT #**
- d. **Development Name**
- e. **City**
- f. **Client's County**
- g. **Client's State**
- h. **Zip:** This will automatically populate City, County, and State!
- i. **Address Data Quality**
- j. **Home Phone Number**
- k. **End Date (move-out):** Only add an end date if moved out of residence
- l. **Current Residence Status**

4. Click on **Save**.

At **Program Exit**, complete the additional Client Residence questions for Heads of Households (including singles and youth):

Current Residence-Remaining questions for clients in site based or scattered site supportive housing only.

- Did the household stay in their apartment when they exited the program?
- If applicable, reason for leaving housing
- If Other, specify

RESPONSE CODES

Client's Residence:

Field	Dependency	Response Category/Data Type
A Start Date	No	1 Date field
B Client Street Address	No	1 Text field
C APT#	No	1 Text field
D Development name (Optional)	No	1 Text field
E City	No	1 Text field (or auto-filled based on zip)
F Client's County	No	1 Text field (or auto-filled based on zip)
G Client's State (optional)	No	1 Text field (or auto-filled based on zip)
H Zip	No	1 Text field
I Address Data Quality	No	1 Full Address Reported 2 Incomplete or estimated address reported 3 Client doesn't know 4 Client refused 5 Data not collected
J Home Phone Number (optional)	No	1 Text field
K End Date (move-out)	No	1 Date field

L Current Residence Status	No	1 Site based supportive housing
		2 Scattered site supportive housing
		3 Transitional housing for homeless
		4 Emergency shelter
		5 Hotel/motel without emergency shelter
		6 Living with family
		7 Living with friends
		8 Foster care/group home
		9 Hospital
		10 Psychiatric facility
		11 Substance abuse treatment center, including detox
		12 Place not meant for habitation
		13 Jail, prison, or juvenile facility
		14 Other
		15 Don't know
		16 Refused

Client Residence at Exit:

Field	Dependency	Response Category/Data Type
A Did the household stay in their apartment when they exited the program?	No	1 Left Current residence at exit
		2 Left residence before exit
		3 Will remain in current residence at exit
B If applicable, reason for leaving housing	Field A, Response 1 or 2	1 Successful completion of residential program
		2 Subsidy ended
		3 Leaving damaged or substandard housing (including fire)
		4 No longer meets eligibility requirements for residence
		5 Non-compliance with residential program rules
		6 Unit does not meet needs (incl. accessibility or size)
		7 On-site services do not meet needs
		8 Location or neighborhood does not meet needs
		9 Conflict with other roommates or neighbors
		10 Cannot afford rent
		11 Leaving project-based voucher for tenant-based voucher
		12 Discharged or reached time limit
		13 Hospitalized or moved to residential treatment program
		14 Incarcerated
		15 Legal eviction/UD for criminal/drug activity
		16 Legal eviction/UD for lease violation, other than criminal or drug
		17 Legal eviction/UD for non-payment of rent
		18 Notice to vacate or non-renewal for criminal/drug activity
		19 Notice to vacate or non-renewal for lease violations, other than criminal or drug
		20 Left service area or residential program
		21 Death
		22 Unknown/Disappeared
		23 Other (Specify)
C If Other, specify	Field B, Response 23	1 Text field

HOUSING COST

Data Collected About: Head of Household (including Singles and Youth) in Site Based or Scattered Site Supportive Housing

Data Collection Point: Project Start, Update (as things change or every 6 months), and Exit

Rationale: To track changes to the amount a client pays for rent.

Data Collection Instructions:

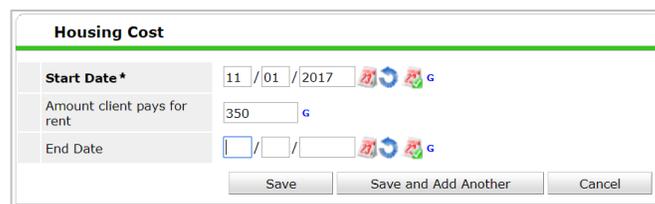
- Housing Cost records should cover the entire time a client **is in housing** with no gaps and no overlaps. Collect information on and enter the full amount that the client is responsible for, even if it is \$0.00.
- Required only while households are residing in site-based or scattered supportive housing.

DATA ENTRY STEP-BY-STEP

1. Confirm you are in EDA mode to the correct provider, in the Head of Household’s record, and on the correct assessment (Entry, Update, or Exit).
2. Confirm the client is in site based or scattered site supportive housing.
3. Click **Add** in the bottom left-hand corner of the Housing Cost box.



4. In the pop-up, answer the applicable data elements.
 - a. **Start Date:** Enter the date they moved into the residence while enrolled in your project, or the date the amount the client is paying for rent changes
 - b. **Amount Client Pays for Rent:** Enter to the nearest dollar (If the client does not contribute to their rent, enter “0”)
 - c. **End Date:** Add if the previous amount client pays for rent has ended and you are about to add a new entry



5. Click on **Save**.

RESPONSE CODES

Housing Cost:

Field	Dependency	Response Category/Data Type
A Start Date	No	1 Date Field
B Amount Client Pays for Rent	No	1 Text Field
C End Date	No	1 Date Field

HOUSING SUBSIDY

Data Collected About: Head of Household (including Singles and Youth) in Site Based or Scattered Site Supportive Housing

Data Collection Point: Project Start, Update (as things change or every 6 months), and Exit

Rationale: To track a client’s housing subsidy while enrolled in a specific project

Data Collection Instructions:

The client’s housing subsidy records should cover the entire time a client is enrolled in the project, with no gaps or overlaps.

DATA ENTRY STEP-BY-STEP

1. Confirm you are in EDA mode the correct provider, in the Head of Household’s record, and on the correct assessment (Entry, Update, or Exit).
2. Confirm the client is in site based or scattered site supportive housing.
3. Click Add in the bottom left-hand corner of the Housing Subsidy Information sub-assessment.
4. In the pop-up, answer the applicable data elements.
 - a. **Start Date:** enter the start date of the subsidy. This should be the current residence start date.
 - b. **Primary Source of Subsidy:** Select from the dropdown list. Select “No Subsidy” if a subsidy is not being utilized.
 - c. **End Date:** Add if the previous housing subsidy has ended and you are about to add a new entry.
5. Click on Save.

At **Program Exit**, complete the following Housing Subsidy questions for Heads of Household (including singles and youth) in Site Based or Scattered Site Supportive Housing:

What was the client’s subsidy status at program exit?	-Select- ▼ G
If subsidy ended at exit, Reason Subsidy Ended	-Select- ▼ G
If Other, specify	_____ G

RESPONSE CODES

Housing Subsidy:

Field	Dependency	Response Category/Data Type
A Start Date	No	1 Date Field
B Primary Source of Subsidy	No	1 No Subsidy
		2 Bridges
		3 County Funded
		4 GRH
		5 HOME
		6 HOPWA
		7 MHFA Rental Assistance
		8 Property Subsidy
		9 SHP Leasing
		10 Section 8
		11 Shelter Plus Care
		12 Sons of Bridges
		13 Other (specify)
C If Other, specify	Field B, Response 13	1 Text Field
D End Date	No	1 Date Field

Housing Subsidy Exit:

Field	Dependency	Response Category/Data Type
A What was the subsidy status at program exit?	No	1 Subsidy ended at exit (answer next questions)
		2 Subsidy ended before exit
		3 Current subsidy will continue
		4 Did not have subsidy
B If subsidy ended at exit, Reason Subsidy Ended	Field A, Response 1	1 No Subsidy
		2 Bridges
		3 County Funded
		4 GRH
		5 HOME
		6 HOPWA
		7 MHFA Rental Assistance
		8 Property Subsidy
		9 SHP Leasing
		10 Section 8
		11 Shelter Plus Care
		12 Sons of Bridges
		13 Other (specify)
C If Other, specify	Field B, Response 13	1 Text Field

UPDATING PROGRAM-SPECIFIC SUB-ASSESSMENTS

You are required to update the **Client Residence, Housing Cost, and Housing Subsidy** sub-assessments as client moves, subsidy changes, or amount the client pays for rent changes. This can be updated as the changes occur or documented when you complete your required interim update (every 6 months after entry). Sub-assessment records should cover the entire time a client is in the project, with no gaps and no overlaps.

Each sub-assessment works the same. This is an overview of adding a new entry to a sub-assessment. Use the information under “Adding Current Residence, Housing Cost, and Housing Subsidy” for understanding how to answer the data elements within each sub-assessment.

Update when completing the required 6-month Interim Review if a change has occurred since the last update, and in addition, when the following occur:

- **Current Residence:** when the client moves
- **Housing Subsidy:** when the client’s housing subsidy changes
- **Housing Cost:** when the amount the client pays for rent changes

DATA ENTRY STEP-BY-STEP

1. Enter EDA mode to the correct provider and enter the Head of Household’s record.
2. In the **Entry/Exit** tab, locate the appropriate Entry/Exit record.
3. Click on the **Interim Review** icon in the Interims column.

Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
CA) Basic	12/01/2016				

Showing 1-1 of 1

4. In the **Interim Review** pop-up, click on **Add Interim Review**.
5. If updating when the change occurs, create an Interim Review and select the type as Update. If updating at the 6-month required Interim Review, create an Interim Review and select the type as **6 Month Review**.
 - a. Remember! If creating the required 6-month Interim Review, include all applicable household members. The 6-month Interim Review is required for all adults (18+) and youth heads of household.
6. Enter the **Review Date**.
 - a. If creating a required **6 Month Review**, enter a date within the month the review is required, and the update is applicable for.
 - b. If creating an **Update**, enter the date of the information change.
7. Locate the sub-assessment you are updating and add an End Date to the previous entry. To do so, click on the Edit Pencil to the left of the entry.

Housing Cost			
Start Date *	Amount client pays for rent	End Date	
12/01/2016	US\$500.00		

Add

Showing 1-1 of 1

8. Add an End Date. No information should be changed, only an End Date should be added. After adding an End Date, click Save and Add Another.

9. Fill out the applicable fields in the sub-assessment according to the **Program-Specific Data Elements – Data Entry Step-by-Step** section of this document.
 - a. The Start Date of the new entry should be one day AFTER the End Date for the previous entry. After completing all applicable fields, click on Save. **There should be no gaps or overlaps in entries.**

SELF-SUFFICIENCY OUTCOMES MATRIX (SSOM)

The SSOM can be a useful engagement tool to work with participants to identify needs and goals. Additionally, the reports generated from this data provide a record of individual participant needs, progress, and outcomes and how they change over time.

Data Collected About: Head of Household (including Singles and Youth) and All Adults (Age 18+)

Data Collection Point: Project Start, Update (every 6 months), and Exit

Data Collection Instructions:

- Complete every six months.
- All domains are required to have a 1-5 response unless the client is not parenting or does not have school-aged children. Answer N/A for Child Care and/or Children’s Education domains. For detailed information on assessing domains, contact DHS directly.
- Ask the client how they would rank themselves, while showing/reading them each option in each of the categories based on the short form, found here: <http://hmismn.org/wp-content/uploads/MN-Self-Sufficiency-Matrix-Short-Form.docx>. The short form matches the information collected in HMIS.
- You should also jot down what you would assign to the client for each. If you and the client disagree on a domain score, select the lower of the two.

DATA ENTRY STEP-BY-STEP

Creating an Initial Matrix at Entry

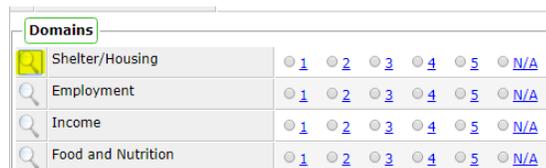
1. Confirm you are in EDA mode to the correct provider and in the correct client record.
2. In the **Measurements** tab, click on **Add New Measurement**.



3. In the Measurement pop-up, complete the following data elements.
 - a. **Provider:** The provider you are in EDA mode to (double-check to make sure correct!)
 - b. **Measurement Tool:** Select Self-Sufficiency from drop-down if it doesn't automatically populate
 - c. **Point of Measurement:** Defaults to Initial as you are entering an initial matrix
 - d. **Date:** Should match the Entry Date used in the Entry/Exit tab (Date client entered your project)
 - e. **Information Reported To:** Select a ServicePoint User or type the name of the person the matrix information was reported to by client by first selecting Other
4. Select **Continue**.
5. Complete all domains by either:
 - a. Clicking on each **radio button** one-by-one (hovering over the **blue numbers** will have a description of what each indicates)



- b. Clicking on the **magnifying glass** next to the first domain and answering each domain. This provides detailed information about ranking each domain with a score. You'll click **Submit & Move to Next** between each.



- c. Click on **Save & Exit**.

Creating an Interim Matrix at Update and Final Matrix at Exit

1. Confirm you are in EDA mode to the correct provider and in the correct client record.
2. In the **Measurements** tab, click on **Add New Point of Measurement**.



- a. Do not click Add New Measurement as this will prompt you to create a new Initial Matrix.
3. In the Measurement pop-up, complete the following data elements.
 - a. **Provider:** This will default to the same provider selected when you created the Initial Matrix.
 - b. **Measurement Tool:** This will default to the Self-Sufficiency Matrix as that is what was selected when you created the Initial Matrix.
 - c. **Point of Measurement:** Select Interim if completing an update between Entry and Exit; select Final if you are completing the final matrix as client exits your project
 - d. **Date:** A matrix is required every 6 months after client enters your project, and at exit. Use the update date (in 6 month increments) if completing an Interim Matrix or the exit date if completing a Final Matrix.
 - e. **Information Reported To:** Select a ServicePoint User or type the name of the person the matrix information was reported to by client by first selecting Other
4. Click on Save & Exit.

NOTE:

- If a client exits and returns after 6 or more months, create a new initial Matrix in the Measurements tab.
- If a client exits and returns less than six months later, click on the Edit Pencil for the previously entered Final Matrix and change the Point of Measurement to Interim (leave the date the same).

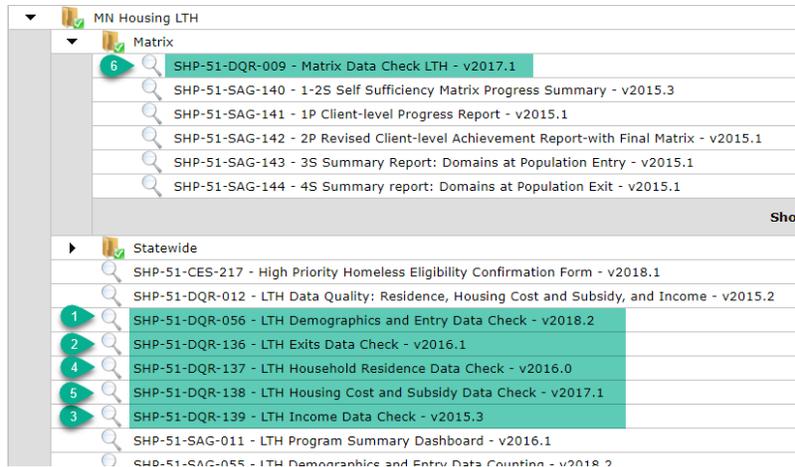
REPORTING GUIDELINES: DATA QUALITY REPORTS

The LTHSFF data check reports include client-level information that will assist with finding any data entry errors or discrepancies. **The Data Check reports should never be sent to a funder.** These reports are for cleaning-up and understanding data only.

It is strongly recommended you run these reports on a quarterly basis and during the process of cleaning up data in advance of generating the reports submitted to the funder.

LTH DATA CHECK REPORTS

- | | |
|--|--|
| 1. LTH Demographics and Entry Data Check | 4. LTH Household Residence Data Check |
| 2. LTH Exits Data Check | 5. LTH Housing Cost and Subsidy Data Check |
| 3. LTH Income Data Check | 6. Matrix Data Check LTH |



1. SHP-51-DQR-056 - LTH Demographics and Entry Data Check

Location: ART. Public Folder → SSA Report Gallery (Funder Reports) (Secure) → State Homeless Programs → MN Housing LTH

- **Required Prompts:** Provider, Enter effective date, Start date, End date

Provider:	Enter the Provider ID(s) you want to run the report for
Reporting Group, if not running by provider:	Do not use unless instructed otherwise
EDA Provider	Do not use unless instructed otherwise
Enter effective date	Enter the last date of the reporting period PLUS one day (should match End Date)
Start date:	Enter the first date of the reporting period
End date:	Enter the last date of the reporting period PLUS one day (should match Effective Date)

- **Data Quality Instructions:** The LTH Demographics and Data Entry Check report is best ran in excel to easily navigate sections by tabs. The top of each tab contains data checking instructions or notes which describe how to understand the data detailed in that tab, as well as the report prompts entered to run this report. Included in this report is client-level data check information regarding **entries and exits, demographics, disabilities, housing history, and veteran status** data elements. For a complete list of each data element outlined in this report, please review each tab.

Report period: 1/1/2017 to 12/31/2017
 date run: 1/24/2018 effective dat 1/1/2018

Entries and Exits

Unduplicated Participants Unduplicated Households

Individuals	# of Entries	households	# of Entries
17	17	6	6

Data Checking Instructions	
* Fields marked with an "*" show data exactly as you entered it into ServicePoint. Other fields have been generated in ServicePoint or ART	
Counting Tables: Participants during this report period (Individuals and Households)	The above counting table is identical to the table you'll find in the counting reports. The datacheck table below show the data used to compute those counts.
	All clients participating during the report period are included on this table.
	Individuals: Counts the number of Client Entry ID's participating during the report period. Households: Counts the number of Household Entry ID's participating during report period and where "Head" = "H". See the Demographics tab if more than 1 household member has an "H" for "Head". Make sure each household has exactly one head.

2. SHP-51-DQR-136 -LTH Exits Data Check

- **Location:** ART. Public Folder → SSA Report Gallery (Funder Reports) (Secure) → State Homeless Programs → MN Housing LTH
- **Required Prompts:** Provider, Report Start Date, Report End Date

Reporting Group, if not running by provider:	Do not use unless instructed otherwise
Provider	Enter the Provider ID(s) you want to run the report for
EDA Provider	Do not use unless instructed otherwise
Report Start Date	Enter the first date of the reporting period
Report End Date	Enter the last date of the reporting period PLUS one day

- **Data Quality Instructions:** The LTH Exits Data Check report is best ran in excel to easily navigate sections by tabs. The top of each tab contains data checking instructions or notes which describe how to understand the data detailed in that tab, as well as the report prompts entered to run this report. Included in this report is client-level data check information regarding **length of stay, exit destination, residence status, reason for leaving, and subsidy information** data elements. For a complete list of each data element outlined in this report, please review each tab.

3. SHP-51-DQR-139 - LTH Income Data Check

- **Location:** ART. Public Folder → SSA Report Gallery (Funder Reports) (Secure) → State Homeless Programs → MN Housing LTH
- **Required Prompts:** Provider, Enter effective date, Start Date, End Date

Provider:	Enter the Provider ID(s) you want to run the report for
Reporting Group, if not running by provider:	Do not use unless instructed otherwise
EDA Provider	Do not use unless instructed otherwise
Enter effective date	Enter the last date of the reporting period PLUS one day (should match End Date)
Start date:	Enter the first date of the reporting period
End date:	Enter the last date of the reporting period PLUS one day (should match Effective Date)

- **Data Quality Instructions:** The LTH Income Data Check report is best ran in excel to easily navigate sections by tabs. The top of each tab contains data checking instructions or notes which describe how to understand the data detailed in that tab, as well as the report prompts entered to run this report. Included in this report is client-level data check information regarding **income and non-cash benefits at entry, current and exit, income change from entry to exit, and income change from entry to current** data elements. For a complete list of each data element outlined in this report, please review each tab.

4. SHP-51-DQR-137 - LTH Household Residence Data Check

- **Location:** ART. Public Folder → SSA Report Gallery (Funder Reports) (Secure) → State Homeless Programs → MN Housing LTH
- **Required Prompts:** Provider, Enter effective date, Start Date, End Date

Provider:	Enter the Provider ID(s) you want to run the report for
Reporting Group, if not running by provider:	Do not use unless instructed otherwise

EDA Provider	Do not use unless instructed otherwise
Enter effective date	Enter the last date of the reporting period PLUS one day (should match End Date)
Start date:	Enter the first date of the reporting period
End date:	Enter the last date of the reporting period PLUS one day (should match Effective Date)

- Data Quality Instructions:** The LTH Household Residence Data Check report is best ran in Excel to easily navigate sections by tabs. The top of each tab contains data checking instructions or notes which describe how to understand the data detailed in that tab, as well as the report prompts entered to run this report. Included in this report is client-level data check information regarding the **Current Residence sub-assessment data such as residence start date and status, city, county, and zip code. Also included is data check information regarding resident changes, address (for Highly Mobile Students only), and number of days in permanent housing.** For a complete list of each data element outlined in this report, please review each tab.

5. SHP-51-DQR-138 - LTH Housing Cost and Subsidy Data Check

- Location:** ART. Public Folder → SSA Report Gallery (Funder Reports) (Secure) → State Homeless Programs → MN Housing LTH
- Required Prompts:** Provider, Enter effective date, Start Date, End Date

Provider:	Enter the Provider ID(s) you want to run the report for
Reporting Group, if not running by provider:	Do not use unless instructed otherwise
EDA Provider	Do not use unless instructed otherwise
Enter effective date	Enter the last date of the reporting period PLUS one day (should match End Date)
Start date:	Enter the first date of the reporting period
End date:	Enter the last date of the reporting period PLUS one day (should match Effective Date)

- Data Quality Instructions:** The LTH Housing Cost and Subsidy Data Check report is best ran in excel to easily navigate sections by tabs. The top of each tab contains data checking instructions or notes which describe how to understand the data detailed in that tab, as well as the report prompts entered to run this report. Included in this report is client-level data check information primarily regarding data entered into the Housing Cost and Housing Subsidy sub-assessments looking at **amount client pays for rent, percentage of income spent on rent, income sources, and subsidy sources.** For a complete list of each data element outlined in this report, please review each tab.

6. SHP-51-DQR-009 - Matrix Data Check LTH

- Location:** ART. Public Folder → SSA Report Gallery (Funder Reports) (Secure) → State Homeless Programs → MN Housing LTH → Matrix
- Required Prompts:** Provider, Start Date, End Date

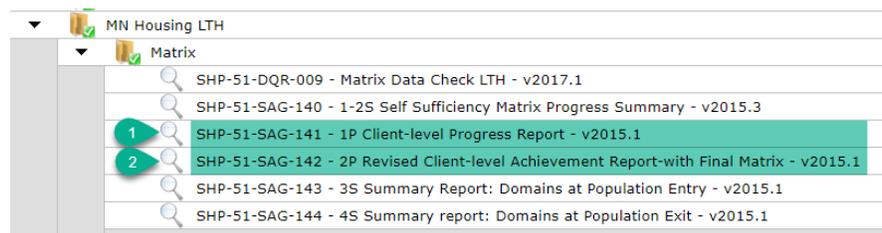
EDA Provider	Do not use unless instructed otherwise
Provider:	Enter the Provider ID you want to run the report for
Start Date	01/01/1999
End Date	Enter the last date of the reporting period PLUS one day

- **Data Quality Instructions:** The Matrix Data Check LTH report is best ran in Excel to easily navigate sections by tabs. The top of each tab contains data checking instructions or notes which describe how to understand the data detailed in that tab, as well as the report prompts entered to run this report. Included in this report is client-level data check information regarding **matrix answer scores, and number of Initial, Interim, and Final matrices by client including the latest matrix date.** For a complete list of each data element outlined in this report, please review each tab.

CLIENT-LEVEL MATRIX REPORTS

There are two Matrix reports available that providers can run for individual clients. **As this is private client data, it should never be emailed or shared publicly!** You can use this information to confirm the data is correctly entered for each client. You can also share it with clients or other program staff within your agency.

1. 1P Client-level Progress Report
2. 2P Revised Client-level Achievement Report-with Final Matrix



Use the standard report period date range for client level reports. Client level reports are best saved as a PDF.

SHP-51-SAG-141 - 1P Client-level Progress Report

- Includes clients with an initial matrix assessment and at least one interim assessment within the report range. Clients with only an initial matrix will not show up in the report.
- Provides a table and chart for each client comparing their initial and most recent assessments (the most recent assessment may be their final matrix).
- Also provides a list of all matrix assessments completed, dates and scores for each client for reference.

SHP-51-SAG-142 - 2P Client-level Achievement Report-with final assessment

- Includes clients with a final assessment during the specified date range.
- Provides a summary table and chart for each client comparing their initial and final assessments.
- Tab B: Includes an overall summary report for all clients who have a final matrix within the reporting period. Shows results by each provider if more than one provider is selected.

REPORTING GUIDELINES: FUNDER-REQUIRED REPORTS

Minnesota Housing requires LTH projects submit ART-generated reports based on both the calendar year and the state fiscal year (July 1 – June 30). The calendar-year reports focus on client outcomes data from the Self-Sufficiency Matrix, while the state fiscal-year

reports focus on demographics, counting, and entry/exit data. Report due dates are typically one month after the report period ends, however please subscribe to funder communications in order to be notified when extensions or other changes are made.

COUNTING AND DATA QUALITY REPORTS (FISCAL-YEAR CYCLE)

- | | |
|---------------------|--|
| Counting | <ol style="list-style-type: none"> 1. LTH Demographics and Entry Data Counting 2. LTH Household Residence 3. LTH Exits 4. LTH Housing Cost and Subsidy Counting 5. LTH Income 6. LTH Program Summary Dashboard |
| Data Quality | <ol style="list-style-type: none"> 7. LTH Data Quality: Residence, Housing Cost and Subsidy, and Income |

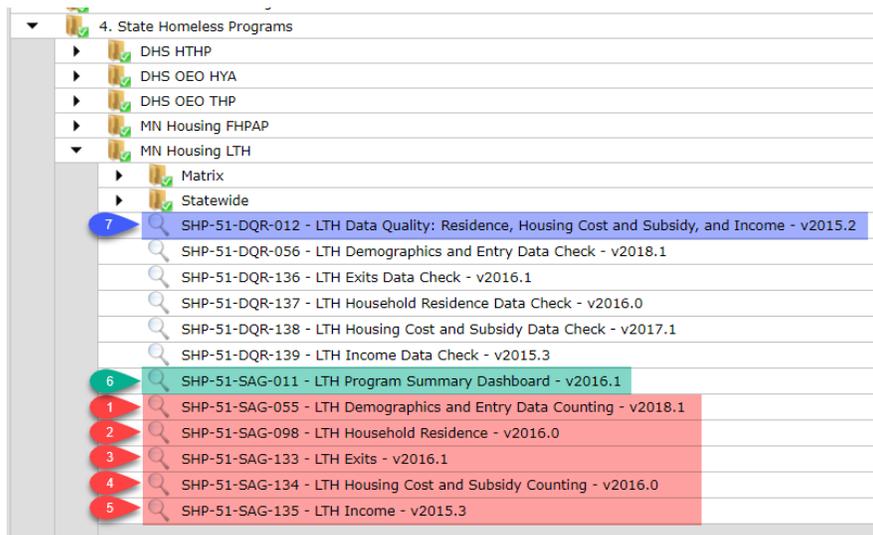
Submission Frequency: Once a year. Typically due in August.

Submission Instructions:

Follow this order when running the reports:

- I. Start with the first five counting reports listed above. Review and make any needed updates or corrections to this data.
- II. Then, run the **LTH Program Summary Dashboard**. This report summarizes a number of pieces of data included in the first two reports, but in a format more focused on quick program overview. (Hence making corrections to the first two reports before proceeding to this one.)
- III. Once you have confirmed data accuracy for the first six reports, then run the **LTH Data Quality: Residence, Housing Cost and Subsidy, and Income**.

1. Locate the reports within ART: Public Folder → SSA Report Gallery (Funder Reports) (Secure) → State Homeless Programs → MN Housing LTH



2. Click on the magnifying glass for the report you are going to run.
3. Input the prompts accordingly. Note that the prompts for each report may present in a slightly different order, so check your work carefully.

Provider:	Provider ID you want to run the report for
Reporting Group, if not running by provider:	n/a
EDA Provider:	n/a
Start date:	First day of reporting period (07/01/previous year)
End date:	Day after last day of reporting period (07/01/current year)
Effective date:	Day after last day of reporting period (07/01/current year)

4. Click on **Schedule Report**. When you schedule a report, it will save to your ART Inbox. If later on you have questions about the report, Helpdesk staff can simply pull the report in question directly from your inbox.
5. For **Report Format**, PDF or Excel are both suitable to the funder. Select the version you prefer for your own review/clean-up efforts.
6. For **Interval**, select Once.
7. For **Start** and **End Date** – auto-filled – no need to change.
8. Review reports for accuracy and submit to Minnesota Housing.
 - a. File name: Project Name_Report Name_Report End Date
 - b. Email files to mhfa.lth@hmis.state.mn.us
 - c. Include name of the project/building in the subject line

UNDERSTANDING THE LTH PROGRAM SUMMARY DASHBOARD

This report summarizes a number of pieces of data included on other reports, but in a format more focused on a quick program overview. As a best practice we recommend running the LTH Demographics and Entry and Exit data check and counting reports first to make sure your data is correct. Then run this report and review the information to make sure it is correct.

Page/Tab 1

Table: Capacity, Utilization, Turnover, Counts of Household Served

A set of numbers is included for each provider selected on the report.

- Capacity is the number of LTH units in a program. This information is pulled not from client information, but from a program section of the system. Wilder staff entered this information based on information provided by Minnesota Housing. If you feel this number is wrong, please contact Minnesota Housing staff.
- Utilization is the number of households served on the last day of the report period (column labeled: In on last Day-Head of Households) compared to the program capacity numbers in the previous column.
- The rest of the columns are household counts that are the same as those included on the first tab of the Demographics and Entry report and cover: In on First Day (start of report period), Entered (during report period), Exited (during report period), In on last day (end of report period) and total households served. If any of these seems wrong, please run the LTH Demographics and Entry data check.

Graph: Household Destination at Exit

This graph includes program exits for heads of household during the report period and groups responses from the destination at exit category into a few different groups.

- Permanent includes: Owned by client, no housing subsidy; Rental by client, no housing subsidy; Rental by client, other (non-VASH) housing subsidy; Staying or living with family, permanent tenure; Staying or living with friends, permanent tenure
- Temporary includes: Emergency shelter, including hotel or motel paid for with emergency shelter voucher; Hotel or motel paid for without emergency shelter voucher; Place not meant for habitation (e.g. a vehicle or anywhere outside); Staying or living with family, temporary tenure; Staying or living with friends, temporary tenure; Transitional housing for homeless persons
- Institutional includes: Psychiatric hospital or other psychiatric facility; Substance abuse treatment facility or detox center; Foster care home or foster care group home; Jail, prison or juvenile detention facility.

Graph: Length of stay-Exited households

For households that exited during the report period, their length in the program is grouped into categories. If you have questions, please look at the LTH Exits data check reports to verify data.

Graph: Length of Stay-Households still in the program

Households served during the program year, but not exiting are included on this graph. The number corresponds to the households in on the program on the last day in the table at the top of the report.

Table: Exit Outcomes

For clients who exited, the “If applicable, reason for leaving residence” (LTH specific question for clients leaving permanent supporting housing) responses are grouped.

- Non-compliance includes: Non-compliance with residential program rules
- Eviction includes: Legal eviction/UD for criminal/drug activity; Legal eviction/UD for lease violations, other than criminal or drug; Legal eviction/UD for non-payment of rent
- Subsidy: Rental by client, other (non-VASH) housing subsidy

Page/Tab 2

On the right side of page/tab 2, the graph and three tables include all clients entered in the program. If you have questions, the Demographics and Entry data check report will give you client level information to verify.

Graph: Household Types

Household types are broken down into five main categories, Single Female, Single Female parent, Single Male, Single Male Parent, and Other.

Table Disabilities

The disabilities table provides data on unaccompanied youth and client 18+ in the program. The table includes columns for singles and clients in families. The categories are the same as in the Demographics

and Entry report, so running the data check report can help to correct any errors.

Table: Special population: veterans

Clients 18 and over who are veterans are listed in this table, again broken out by clients who are singles or who are in families. Table Special populations: DV and jail or prison Two separate questions are included in this table for clients 18+ or unaccompanied youth.

- Domestic Violence comes from the “domestic violence victim/survivor (ever)” question.
- “Left jail or prison less than 6 months ago” is pulled from the two institutional placement questions asking about “leave any of these (0 to 3 months ago)?” or “leave any of these (over 3 months ago, up to 6 months ago)?” if the response is “county jail or workhouse” or “state or federal prison.”

UNDERSTANDING THE LTH DATA QUALITY REPORT

The Data Quality Report was designed to be a tool for LTH funded programs and State staff to communicate about data quality issues and make the reporting process easier. Rather than send in separate counting reports for residence, housing cost and subsidy, and income, you just send in this one report. You will use this report, along with the data check reports, to make sure your data problems are corrected for the reporting period. Once you have corrected the problems, you will send on the report to the State for review.

Best practice is to run and review the three counting reports for accuracy before moving on to the LTH Data Quality Report. It is also recommended to run the corresponding data check reports (detailed in the data quality section) to make sure the detailed client information is accurate.

Report Details

The Data Quality tables will show one row for each household. The first column will be the Household ID. If there is a data entry problem with any member of the household, the cell will be highlighted in yellow and the cell border will be bold. If there is no data entry problem, the cell will be blank.

Tab 1: Household Counts

If you have already verified your Demographics and Entry and Exit Counting reports are correct, the counts on this tab should be correct. You can use these counts to verify that counts on later tabs are correct and include all the clients/household.

Tab 2: HH

This tab contains data checking fields to verify that Head of Household information is recorded correctly. Problems with Head of Household will negatively affect the counts for Household Residence, Housing Cost and Subsidy, and Income. Each column highlights a different head of

household problem. If the cell is blank, there are no problems. Records with problems are colored yellow, with a black box and say “error.” The notes at the top of the report will guide you to the corrections that need to be made.

Tab 3: Household Members

This tab helps you locate the client ID associated with the Household ID listed on the data quality tables so you can look them up in ServicePoint. If a problem is indicated on the Data Quality tables, find the Household ID on this tab; the Client ID of all household members will be listed with the Household ID. You will find the household IDs on the more detailed data check reports as well.

Income and non-cash benefits tabs (tabs four through seven)

These tabs summarize income and non-cash benefits by household. Use this information to verify that totals are correct, especially for households with no income or benefits. Common inconsistencies between income or non-cash benefits questions and their related sub-assessments are highlighted. Clients or households with duplicate income or non-cash benefit sources are also highlighted. These highlights may indicate errors, but you’ll need to check the ServicePoint record to be sure. Please continue to run the existing income data check report, which will still be very useful to dig further into any questionable records. See more detailed explanations below for each tab.

Tab 4: Current Income

The term “current” means:

- clients that are still currently being served by the program as of the end date on the report
- data that is valid at the end of the report period, such as an income record without an end date.

This tab summarizes current income data for all current household members. Households with duplicate income sources are highlighted. These highlights may indicate errors. Most often we see duplicates when end dates are forgotten. There may be multiple household members with the same income source, which may be accurate and correct data entry. Please check the records with multiple income sources and verify that they are correct. If you find an error, please update the record.

Tab 5: Income at Exit:

This tab summarizes income at exit for all household members exiting the program in the reporting period. The tab also includes a count of clients where the income end date is equal to the client exit date. If these two dates are the same, it indicates to the system that the income ended at exit and isn’t included. Please make sure that if any clients are included in this count their income did end at exit and the end dates weren’t mistakenly entered. If the income source did not end, please do not put an end date on the income record.

Households with duplicate income sources are also highlighted. These highlights may indicate errors. Most often we see duplicates when end dates are forgotten. There may be multiple household members with the same income source, which may be accurate and correct data entry.

Please check the records with multiple income sources and verify that they are correct. If you find an error, please update the record.

Tab 6: Current Non-Cash benefits

The term “current” means:

- Clients that are still currently being served by the program as of the end date on the report
- Data that is valid at the end of the report period, such as a benefit record without an end date.

This tab summarizes current non-cash benefits for household heads (Only the household head) in the program as of the end of the report period. Note that this table shows benefit records ONLY for the head of household. Households with duplicate benefit sources are highlighted. These highlights may indicate errors. Most often we see duplicates when end dates are forgotten. Please check the records with multiple benefit sources and verify that they are correct. If you find an error, please update the record.

Tab 7: Non-Cash Benefits at Exit

This tab summarizes non-cash benefits at exit for household heads (Only the household head) exiting the program in the reporting period. The tab also includes a count of households where the non-cash benefit end date is equal to the client exit date. If these two dates are the same, it indicates to the system that the non-cash benefits ended at exit. Please make sure if any household are included in this count that their non-cash benefits ended at exit and the end dates weren't mistakenly entered.

Tab 8: Current Residence

This tab includes information from the Current Residence sub-assessment which is required for all household heads. Each head of household should have Current Residence records with start and end dates entered correctly so that one current record shows up in the report. If more than one record is effective at the end of the report period, the text in the highlighted cell will read, “multiple”. Additionally, a cell highlighted with “No Current Record” may have a sub-assessment in the system, but the start and end dates don't line up so that the information is pulled for the current report period.

For clients in programs funded by MN Housing, the response options to “Current Housing Status” should always be either “Site based Supportive Housing” or “Scattered Site Supportive Housing.” For programs funded by DHS, the responses may include any of the options depending on a client's living situation. Because of the MN Housing requirements, any response that isn't within these two categories is highlighted as “Not PSH” in yellow. MN Housing funded programs should make sure to fix these responses to one of the two correct options. DHS funded programs, please make sure the responses for these clients are correct.

Any missing information is highlighted in yellow as “Missing.” All fields on the reports are required, so make sure to add information that is missing.

Tab 9: Housing Cost and Subsidy

This tab includes information from the Housing Cost and Subsidy Sub-assessment. Each head of household should have start and end dates entered correctly so that only one current record shows up in the report. A common problem is to have multiple sub-assessment records without end dates. These problems are highlighted in the first two columns and are indicated with yellow highlighted “Multiple” boxes. Clients with no current housing cost and subsidy sub-assessment are also highlighted, which often means that the start and end dates don’t line up with the report period, so make sure all housing cost and subsidy changes are entered with the correct dates.

The third row of data covers the additional questions for clients who have exited. Missing information for exited clients is highlighted in yellow with “Missing.”

Tab 10: Report Information

Use this tab to verify you ran the report for the correct providers and date range. Save the report as an Excel document and email it to your LTH funder.

MATRIX SUMMARY REPORTS (CALENDAR-YEAR CYCLE)

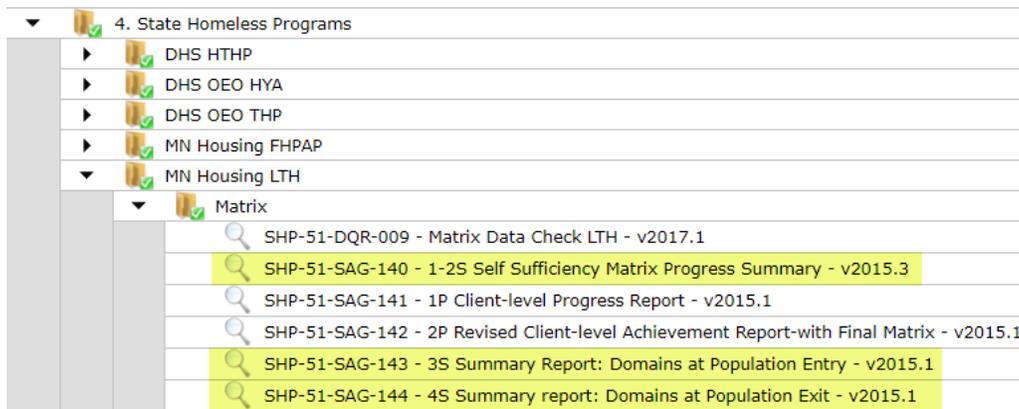
There are a total of three summary matrix reports to send to your funder. One is a summary progress report similar to the client level reports, but with only overall counts. The two other reports focus on summarizing each matrix area at entry and at exit.

1. 1-2S Self Sufficiency Matrix Progress Summary
2. 3S Summary Report Domains at Population Entry
3. 4S Summary Report Domains at Population Exit

Submission Frequency: Once a year. Typically due in February.

Submission Instructions:

1. Run and review the Matrix Data Check Report and Provider Level Reports (detailed in the Data Quality section of this document). Do not submit these to the funder!
2. Locate the reports within ART: Public Folder → SSA Report Gallery → Matrix Reports



9. Click on the magnifying glass for the report you are going to run.

- Input the prompts accordingly. Note that the prompts for each report may present in a slightly different order, so check your work carefully.

Entry Report:	
Provider:	Provider ID you want to run the report for
Reporting Group, if not running by provider:	n/a
EDA Provider:	n/a
Start date:	NOTE THIS IS DIFFERENT!! 01/01/1999
End date:	Day after last day of reporting period (01/01/current year)
Effective date:	Day after last day of reporting period (01/01/current year)

Summary and Exit Reports:	
Provider:	Provider ID you want to run the report for
Reporting Group, if not running by provider:	n/a
EDA Provider:	n/a
Start date:	First day of reporting period (01/01/previous year)
End date:	Day after last day of reporting period (01/01/current year)
Effective date:	Day after last day of reporting period (01/01/current year)

- Click on **Schedule Report**. When you schedule a report, it will save to your ART Inbox. If later on you have questions about the report, Helpdesk staff can simply pull the report in question directly from your inbox.
- For **Report Format**, select PDF if it's the official version you intend to submit to the funder. If you are running it for your own review, select PDF or Excel (whichever suits your review/clean-up efforts).
- For **Interval**, select Once.
- For **Start and End Date** – auto-filled – no need to change
- Review reports for accuracy and submit to Minnesota Housing.
 - File name: Project Name_Report Name_Report End Date
 - Email files to mhfa.lth@hmis.state.mn.us
 - Include name of the project/building in the subject line

UNDERSTANDING THE SUMMARY REPORTS

SHP-51-SAG-140 - 1-2S Self Sufficiency Outcomes Matrix Progress Report

- Report is similar to the client level data reports, but has averages scores for the entire program, not by client.
- To be included in this report the client must have an initial matrix assessment and one interim or final assessment. One matrix date must be also be in the report range. Clients with only the initial matrix will not show up in the report.
- Divided up into three sections:
 - Table one compares the initial assessment to the most recent assessment in the date range.
 - Table two is broken down into more detail with the initial assessment compared to both the most recent interim assessment or to the final assessment.
 - Table three includes only clients with a final matrix, comparing initial and final assessments.

SHP-51-SAG-143 - 3S Summary Report: Domains at Population Entry - v2015.1**SHP-51-SAG-144 - 4S Summary report: Domains at Population Exit - v2015.1**

- Each of the 17 matrix domains has its own page on the reports. The two most useful sections will be:
 - Frequencies (table): lists the number of clients with each score
 - Histogram (chart): shows in a graph the number of people with each score.
 - Please remember 6=NA
- Last section includes client level summary information (by Client ID only).
- Review data to ensure it looks accurate for clients entering or exiting your program.
- The Entry and Exit Reports are:
 - 3S Domains at Population Entry
 - Includes initial matrix assessments only. It includes all clients with initial assessments and doesn't filter out anyone with final exits. For sending reports to funders, select 1/1/1999 as the start date to capture all clients' initial assessments. You can also run the report for your own information. For the report start and end dates, select the time frame you would like to see initial assessments for, such as all initial assessments in a fiscal year.
 - 4S Domains at Population Exit
 - Includes only final matrix assessments which are completed at program exit.
 - Run the report for the time period you would like to see exits for, usually the same as standard reporting periods.

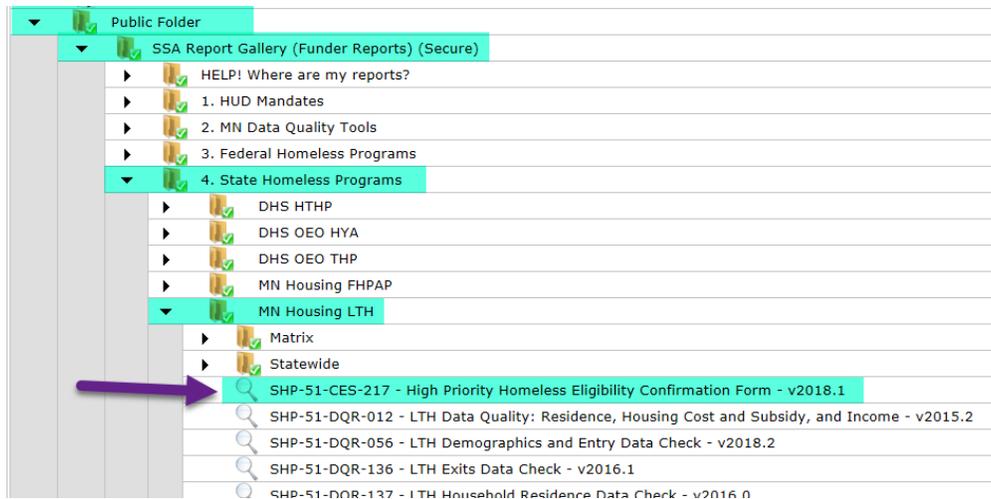
HIGH PRIORITY HOMELESS (HPH) ELIGIBILITY CONFIRMATION FORM

This report is required for projects that are utilizing the High Priority Homeless eligibility definition and thus receiving referrals from the Coordinated Entry System.

This report/form will serve as confirmation of HPH eligibility of clients who are *enrolled* in the program. It will detail the date(s) the client was referred to the priority list, the date the referral was accepted by the housing provider, and the Project Start Date for the housing provider (from Entry/Exit record). It is not necessary to run this report for clients who never actually proceed to enrollment.

Submission Frequency: One time per client *after* the client has been enrolled in the project and the Entry/Exit has been created (ie there is a Project Start Date). Store in client’s file.

Location: ART. Public Folder → SSA Report Gallery (Funder Reports) (Secure) → State Homeless Programs → MN Housing LTH



Detailed Instructions:

- 1) Click the magnifying glass
- 2) Click Schedule Report
- 3) Fill in the Prompts (detailed explanation below summary table):

Select CoC Code(s) [Primary]:	Select all relevant codes (will usually just be one)
Select CoC Code(s) [Alternative]:	Select all relevant codes
EDA Provider:	Leave blank
Enter Client ID(s):	ID of client enrolled in program
Enter Cutoff Date:	Leave as-is
Enter effective date:	Current date 12:00:00 AM
Enter HPH Provider:	Housing provider client enrolled in

a. Select CoC Code(s) [Primary]:

- i. Click Select
- ii. Select the CoC your housing provider is within and the CoC for the priority list the client is being referred from. In the vast majority of cases, this will be the

same. But if a housing provider is accepting a referral from another region, you would need to include both.

- iii. Add to Selected Values by clicking the green plus button
- iv. Take mental note of the number in the code (ie MN-503 SMAC)
- v. Click Submit

b. Select CoC Code(s) [Alternative]

note this is a “back-up” reporting mechanism that helps ensure the report is capturing all relevant data

- i. Click Select
- ii. Input the number noted above into the Search box and click Search.
- iii. Select all results containing that number.
- iv. Add to Selected Values by clicking the green plus button
- v. Click submit

c. EDA Provider

- i. Leave blank

d. Enter Client ID(s):

- i. Click Search
- ii. Input Client ID number into Search field
- iii. Click Add (You do not need to actually search for it)
- iv. Add to Selected Values by clicking the green plus button
- v. Click Submit

e. Enter Cutoff Date:

- i. This defaults to 01/01/2017. Just leave it as is.
- ii. Note this only serves to limit how far back this report looks and there is no need for it to look back further than when CES moved into HMIS.

f. Enter effective date:

- i. Enter the current date and 12:00:00 AM

g. Enter HPH Provider:

- i. Click Select
- ii. Search for the 4-digit ID number for the housing provider the client is actually being enrolled in (ie the one you created an Entry/Exit for)
- iii. Add to Selected Values by clicking the green plus button
- iv. Click submit

4) Click Next

5) Under Schedule Report

- a. Change the name as desired (not required)
- b. For Report Format select PDF (note that report is designed to generate a clean 1-page document)
- c. For Interval, select Once
- d. Leave Start/End Dates alone
- e. Click Send

6) The report will be available in your Inbox once complete.