

COORDINATED ENTRY WORKFLOW HMIS

DATA ENTRY INSTRUCTIONS

ENTRY/EXIT WORKFLOW TO BE COMPLIANT WITH HUD COC APR REQUIREMENTS

- Access Points Data Entry Steps – Page 1 – 4
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ACCESS POINTS DATA ENTRY STEPS (“STEP 2”)

Access Points have 3 general roles for HMIS “Step 2” Data Entry in HMIS. This does not include data entry for “Step 1” – diversion or prevention.

- Locate or create a client record in HMIS
- Place a client onto the Priority List
- Update data while a client is on the Priority List

LOCATE OR CREATE A CLIENT RECORD IN HMIS

A client must agree to participate in Statewide Data Sharing (a consented ROI) to be entered in HMIS for Coordinated Entry. If you place a CLOSED client record onto the Priority List, this client will not appear on the Priority List Report and will not be contacted for available housing. If the client does not agree to share in HMIS, contact your Priority List Manager to understand how your CoC is tracking a Priority List outside of HMIS. HMIS ROIs are stored here: <http://hmismn.org/administrative-documents/>.

1. Click on “Enter Data As” (EDA) and select your **Coordinated Entry Assessment** provider.
2. In ClientPoint, fill out search prompts for client to see if a client record already exists.
 - a. If a client record already exists, make sure this is a shared client record (Alias field should say SHARED).
 - b. If no matching results, create a new client record. Fill in as many of the search prompts as you can before clicking on “Add New Client With This Information.” Remember to add SHARED to the Alias field as you are creating an “open” client record.
3. If you are not doing live or same day data entry, backdate to date of assessment (in pop-up or by clicking on “Back Date”).
4. If the client is planning to live with other household members, you will want to create a household in the Households tab if this hasn’t already been created with the household configuration. For detailed instructions on how to create households, please refer to the [Households How-To Guide](http://hmismn.org/wp-content/uploads/Households-How-To-Guide.pdf) (<http://hmismn.org/wp-content/uploads/Households-How-To-Guide.pdf>).

PLACE A CLIENT ONTO THE PRIORITY LIST

Note: If the participant is being assessed for a second time, read section “Updating Assessment Data” to understand how to correctly update data elements on the CES Assessment(s) to make sure accurate information is pulled onto the Priority List.

1. Click on “Enter Data As” (EDA) and select your Coordinated Entry Assessment provider.
2. Enter the Head of Household’s record.
3. If you are not doing live or same day data entry, backdate to the assessment date (in pop-up or by clicking on “Back Date”).
4. On the Entry/Exit tab, click on Add Entry/Exit.
5. If entering a household, be sure to include all applicable household members in the Entry by checking the boxes.
 - a. **Provider** prompt should be filled in as your Coordinated Entry Assessment provider.
 - b. **Date** should match your system date which is in backdate to the assessment date.
 - c. **Entry Type:**
 - Select HUD if Category 1 LITERALLY HOMELESS upon ENTRY DATE.
 - Select BASIC for all other. (This will ensure that clients that are not Category 1 LITERALLY HOMELESS upon Entry can be extracted from APR, if necessary.)
 - If needed, you can change Entry Type at the top of the next pop-up via the drop-down and then click on the Update button.
6. Click on Save & Continue.
7. In second pop-up, complete the HUD CoC All Inclusive Assessment for each household member (Remember! Not every question is required for everyone). The Priority List report, however, is only designed to pull relevant information from the Head of Household’s record.
 - a. If the client is currently enrolled in a project provider (example: shelter) or has been served by a homeless service agency before, the client may already have data populate the assessment. If this is the case, review the data and confirm it is correct and reflects the status of the household upon “Entry” onto the Priority List (accurate for the day the household is being added to the Priority List). Update if it is not.
8. After completing the HUD CoC All Inclusive Assessment, select and complete the CES Assessment: SLC for the Head of Household only.
9. Click on Save & Exit.

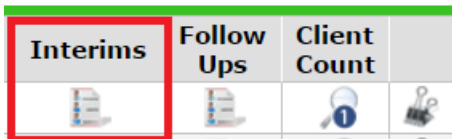
The client will now appear on your CoC’s Priority List Report. All you need for a client to appear on your CoC’s Priority List is an Entry record into your agency’s Coordinated Entry Assessment provider.

UPDATE DATA WHILE A CLIENT IS ON THE PRIORITY LIST

These are the steps to follow if an assessor needs to update data while the client is on the Priority List. Remember to update contact information as this is the information a housing agency will use to get in touch with the participant.

*NOTE: If you are updating data that was true for the client upon the Entry Date for your Coordinated Entry Assessment provider, open the Entry Assessment to input the information. If you are updating data that has **changed** since the Entry Date (ex. Income) and was not true as of Entry Date, follow the steps below.*

1. Click on “Enter Data As” (EDA) and select your Coordinated Entry Assessment provider.
2. Enter the Head of Household’s record.
3. If you are not doing live or same day data entry, backdate to the information date (in pop-up or by clicking on “Back Date”).
4. In the Entry/Exit tab, click on the Interims icon:

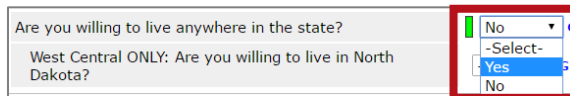


5. Interim Review Type: Update.
6. Update any information you need to on the HUD All Inclusive (all household members) or the CES Assessment (HoH only).
7. The updated data will be available for the Priority List Report following the next ART upload.

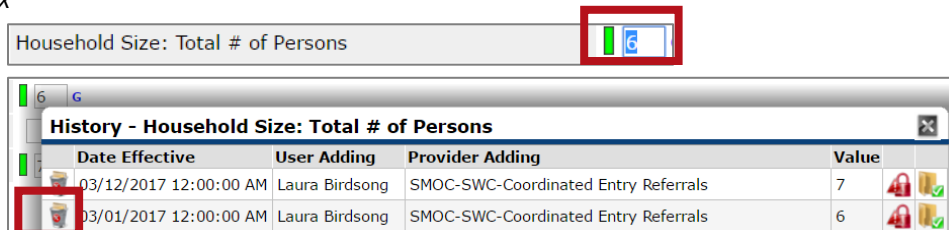
UPDATING TEXT BOXES OR DROP-DOWN MENUS

- a. Simply overwrite the previous answer to update the response.

Drop-Down



Text Box



- b. If the previous answer was entered in error, delete the incorrect answer by clicking on the history bar and clicking on the trash can.

UPDATING SUB-ASSESSMENTS ON COORDINATED ENTRY ASSESSMENT

These instructions do not discuss updating Monthly Income, Non-Cash Benefits, Disabilities, and Health Insurance sub-assessments that appear on the HUD CoC All Inclusive Assessment. For detailed instructions on how to do that, watch [Updating HUD Sub-Assessments – HUD Verification](https://vimeo.com/217745148) (<https://vimeo.com/217745148>).

For some sub-assessments (tables throughout the assessment), it is important to “END” previous answers that are no longer accurate so that they do not appear on the Priority List Report. You do NOT, however, need to update all sub-assessments with an end date as some entries won’t change.

Sub-assessments with responses you do NOT need to “END”

Sub-assessments with responses you DO need to “END” (not all sub-assessments are available on all CES Assessments)

- Housing Summary
- CES Date Tracking
- VI-SPDAT

- Assessor Info – Step 1
- Assessor Info – Step 2
- CoC Preferences
- Housing Preferences
- Current Case Manager
- Legal Involvement
- Barriers to Housing
- Monthly Household Income
- Demographic Information of Children in Household
- Household Disability Information

a. Click on the Edit Pencil for the line item you want to end.

b. Add an End Date and click Save.

c. In order to delete a sub-assessment entry that was created in error, you need to have “created” or entered the data in order to delete the record set. If the record set was entered by another agency you will most likely not be able to delete that record.

UPDATING A VI-SPDAT

- If you re-assessed a client, you’ll create a NEW VI-SPDAT on the CES Assessment: Step 2.
- If you need to update an existing VI-SPDAT due to error, click the edit pencil next to the VI-SPDAT.
 - If you entered some data in error, you’ll want to add the correct answer and delete the previously entered wrong answer by clicking on the history bar.

Date Effective	User Adding	Provider Adding	Value
11/21/2016 1:51:14 PM	Leah Tornquist	Ollivanders-ES-CoC-Galleons	0

HOUSING AGENCY DATA ENTRY STEPS

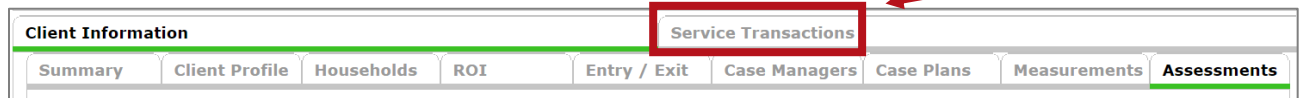
Housing Agencies have the following roles for HMIS “Step 2” Data Entry in HMIS.

1. Provisionally accept a referral
2. Enroll a referral
3. Decline a referral

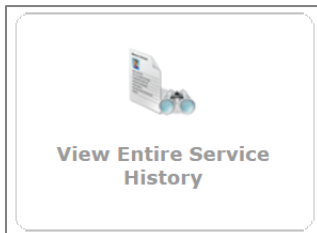
PROVISIONALLY ACCEPT (ACKNOWLEDGING) A REFERRAL

Your CoC’S Priority List Manager will run the Priority List Report and make a referral to your housing project directly in HMIS. An identified primary contact at your agency will receive an email when an individual has been matched with your reported housing opening. This will also contain information on which provider the client was referred to. You have to log into HMIS to see the client ID.



1. EDA to your project provider with a housing opening (the provider listed in the email).
2. Open the client’s record.
3. Do not backdate. You will use today’s date.
4. Click on the Service Transactions tab.



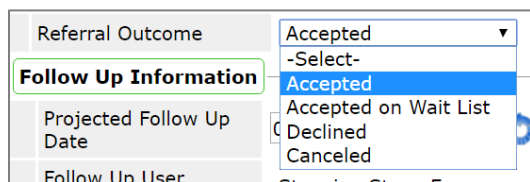
5. Click on “View Entire Service History” to bring you to the Entire Service History tab.




6. Click on the Edit Pencil to the left of the referral you want to accept.

All Service Transactions							
Select Dates		Start Date			End Date		
-Select-		/ /			/ /	Search	
	Transaction Type	Date	Provider		Type	Need Status / Outcome	Need Goal
	Need	02/28/2017	SMOC-SWC-Coordinated Entry Referrals		Housing/Shelter	Closed / Fully Met	
	Referral	02/28/2017	SWC CES Priority List		Housing/Shelter		





7. Change the referral outcome to Accepted.



8. Click on Provide Service.

Service Information	
Provide Service	 A Service has not yet been provided for this Referral.

9. Service Provider should already be filled out as your project provider provisionally accepting the referral (as you are instructed to be in EDA mode to this provider). This matters for the Priority List report so that the Priority List knows which agency and program picked up the referral.
10. The End Date can be same as Start Date. Again, the Start Date and End Date will be today's date.
11. Service Type: Housing Search and Information (You may need to click on Look-up; also trying to make it available in the drop-down).
12. Skip Provider Specific Service.

Service Provider *	Ollivanders-ES-CoC-Galleons (4106)	<input type="button" value="Search"/>	<input type="button" value="My Provider"/>	<input type="button" value="Clear"/>
Creating User	Laura Birdsong			
Start Date *	03 / 18 / 2017			12 : 00 : 00 PM
End Date	03 / 18 / 2017			12 : 00 : 00 PM
Service Type *	Make Service same as Need Housing/Shelter (BH) <input type="button" value="Look Up"/>			
Provider Specific Service	-Select- ▼			

13. Click on Save & Continue.
14. Upon clicking Save & Continue, a new screen will load with a lot of different sections to add content. You can skip everything.
15. Click on Save & Exit.

ENROLL A REFERRAL INTO YOUR PROGRAM

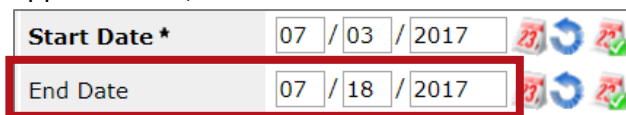
The outcome of a referral from the Priority List is either (1) the individual enrolls in your housing program or (2) you decline the referral (ex. If the client refuses service, if you are unable to contact client after a specified amount of time, if the client self-resolved).

If the client enrolls in your housing program:

1. EDA to your project provider.
2. Backdate to the date the client enrolls in your program.
3. Enter client's record.
4. In the Entry/Exit tab, add an End Date to the Entry/Exit record created by the assessing agency "[Agency] SLC Coordinated Entry Assessment." The End Date removes the individual from the Priority List. (Note: We realize you are not in EDA to the Coordinated Entry Assessment provider to complete this step. That is OKAY for this step.)
 - a. **Exit Date** for Coordinated Entry Assessment provider should be the SAME date the client is enrolling into your housing program.
 - b. **Reason for Leaving** Skip
 - c. **Destination:** Select the appropriate destination that matches the housing program you're enrolling them into housing.
5. Click on Save & Continue.
6. In the Exit Assessment pop-up, answer data elements on the CES Exit Assessment.
7. Click on Add Entry/Exit and continue data entry per usual.


DECLINE A REFERRAL

1. EDA to your project provider that the participant was originally referred to via HMIS.
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 Housing Search and Information.
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.)



The image shows a date selection interface with two rows. The first row is labeled "Start Date *" and has the date "07 / 03 / 2017" entered. The second row is labeled "End Date" and has the date "07 / 18 / 2017" entered. To the right of each date field are three icons: a red pencil, a blue circular arrow, and a red trash can. A red rectangular box highlights the "End Date" field and its date.

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

 Referral Information
Referred-To Provider: ATCHO-P

9. Change the referral outcome to Declined:

Referral Outcome	Declined ▼
If Canceled or Declined, Reason	

10. Select the reason why declined:

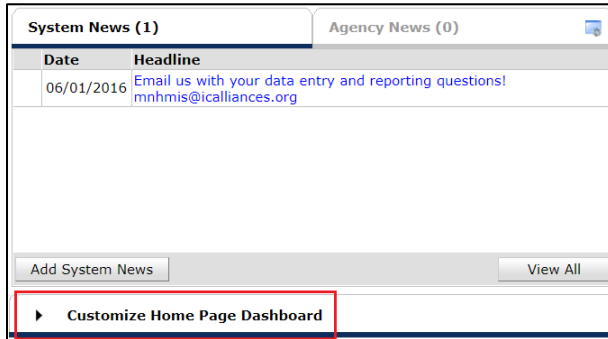
-Select- ▼
-Select-
Client disappeared or unreachable
Client found housing (self-resolved)
Client is eligible, but provider unable to accept
Client is not eligible
Client moved outside CoC
Client placed in institutional setting
Client refused service and not returned to list
Client Refused Service and returned to list
Other
Unable to locate housing
Unknown

11. Click on Save & Exit.

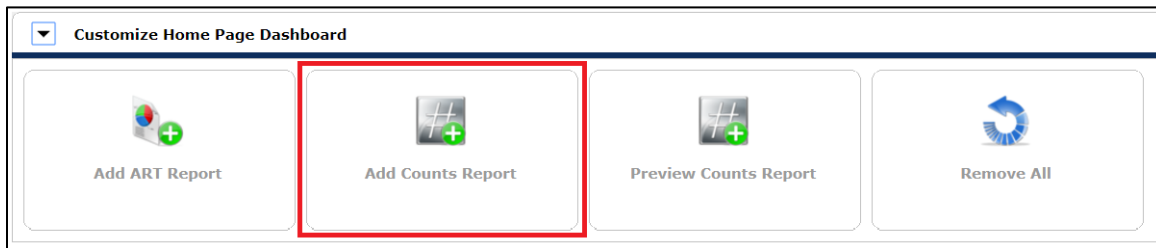
12. No other action is needed.

ADDING COUNTS REPORTS TO YOUR HOME PAGE

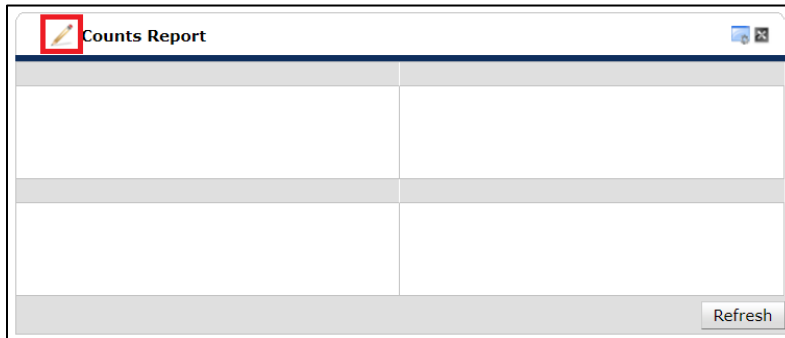
1. On the Home Page Dashboard, click on the **Customize Home Page Dashboard** at the bottom of the screen:



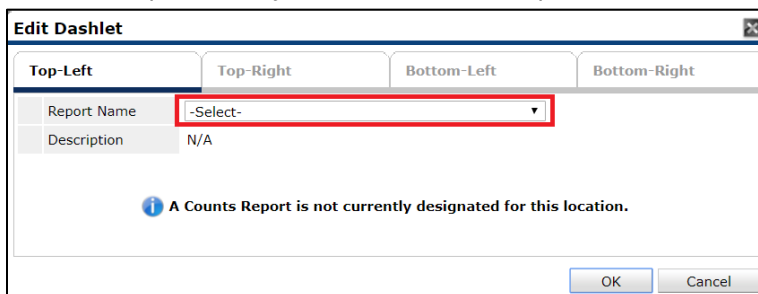
2. Click **Add Counts Report**



3. Click the Edit Pencil icon on the Counts Report box.



4. Select the Report Name you would like in the Top-Left box of the Count Report



5. The Counts Report for users who will be accepting Coordinated Entry referrals from a Priority List Manager is **Outstanding Incoming Referrals**. This report lists all outstanding referrals made TO the specified providers

during the specified date range. An outstanding referral is one that has not had a service provided, the need status is not 'Closed,' the need outcome is not 'Fully Met,' and the referral outcome is not 'Accepted,' 'Declined,' or 'Canceled.'

6. When using the **Outstanding Incoming Referrals** Counts Report, select the following:
 - a. **Select Dates:** All Dates
 - b. **Provider Type:** Provider
 - c. **Provider:** Search for the housing provider that the Priority List Manager will be sending Coordinated Entry referrals to.

7. If you have multiple housing providers accepting referrals, you can create a Counts Report for those providers. Click on Top-Right and choose the next count you would like on your dashboard. Repeat steps 4-6 for the remaining available Dashlets.
8. Click Save at the top of the Home Page Dashboard:

9. The numbers that appear in the Counts Report are hyperlinks that, when clicked on will open a pop up window and a list of clients that are in the count. The client ID numbers are hyperlinks to the client's file.

VERSION UPDATES

Date in Footer	Version	Change/Update
7/8/2017	1	First publication of this document
7/30/2017	2	<ul style="list-style-type: none">• Removed, “(Note: We are still double checking this with the HUD contact to confirm HUD only wants clients literally homeless upon Entry on the APR.)”• Added steps when declining a referral in HMIS to account for the date the referral was declined. In order to track this date, the instructions now tell users to change original End Date of Service Provided.
9/18/2017	3	<ul style="list-style-type: none">• Added instructions for adding a Counts Report to Home Page Dashboard.