

MINNESOTA'S COORDINATED ENTRY ASSESSOR DATA ENTRY INSTRUCTIONS

This document contains data entry instructions for HMIS users that participate in Minnesota's Coordinated Entry Systems. Depending on the Continuum of Care (CoC), there may be supplemental instructions as well. Questions about entering Coordinated Entry data in HMIS can be directed to the Minnesota HMIS Helpdesk at mnhmis@icalliances.org.

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ASSESSMENT

The Priority List is used to prioritize clients for placement in housing programs. Assessors are asked to accurately and completely fill out the Coordinated Entry assessment so that the best possible referrals can be made by Priority List Managers. **Note: The term “client” will be used throughout this document to refer to a person experiencing homelessness.**

ASSESS A CLIENT AND PLACE THEM ON THE PRIORITY LIST

Only clients who have completed an **HMIS Release of Information** and consented to share their information statewide can be added to an HMIS Priority List. If a client does not wish to share their data, contact your Priority List Manager to connect them with the non-HMIS Priority List.

In this section, you will...

- ✓ Find an existing record or create a new record for the client being assessed.
- ✓ Create a new Entry/Exit for the Coordinated Entry Assessment provider.
- ✓ Fill out the Coordinated Entry assessment as accurately and completely as possible.

FIND OR CREATE A CLIENT RECORD IN HMIS

1. Click on **Enter Data As** and select your **Coordinated Entry Assessment** provider.
2. Open **ClientPoint** and search for the client being assessed.
 - a. If a matching client record appears in the search results, verify that the record is shared before clicking on the client’s name: The **Alias** field should contain the word **SHARED**.


Client Results					
	ID	Name ▲	Social Security Number	Date of Birth	Alias
	1015945			09/19/1991	SHARED
	178177			05/05/1955	
	1042887			08/11/2015	SHARED

**Client records with six-digit IDs are never shared records. Some records with seven-digit IDs are not shared either, depending on the client’s preferences.*

- b. If there are no matching results, fill in as many of the search fields as possible before clicking on **Add New Client With This Information**.



3. When prompted at the client record screen, enter the date of assessment into the [Back Date Mode](#) pop-up and click on [Set New Back Date](#).
 - a. If doing same-day data entry, select [Use Current System Date](#).

Back Date Mode ✕

 The current System Date is set to:

02/21/2020 2:15:51 PM

If you would like to use a different date, please select one below:

Back Date 02 / 21 / 2020   12 : 00 : 00 AM ▼

**Setting a new back date will temporarily change the system date. Any information you enter will be marked with that modified system date.*





4. Select the [Client Profile](#) tab and check that the [Client Record](#) section is not missing information.

 **Client Record**

Name	[REDACTED]
Name Data Quality	Full Name Reported
Alias	SHARED
Social Security	
SSN Data Quality	Client refused (HUD)
U.S. Military Veteran?	Yes (HUD)
Client ID	1060073 
Age	61

- a. If you created the client record, type **SHARED** in the [Alias](#) field, then fill out the [Universal Profile](#) with all available information. Don't forget to enter the [Date of ROI Consent](#)!

It is the responsibility of the agency with the first signed ROI to enter the date signed below. Do not override.

Date of ROI Consent / /    

The agency that creates a client record is responsible for entering the **Date of ROI Consent when a client agrees to information sharing.*

5. **[Households Only]** Select the [Households](#) tab and look for a household that has the correct members included.
 - a. If there is no household with the correct composition, create a new one that includes everyone that will be added to the Priority List. **Do not** remove or delete members from an existing household!

Name	Age	Head of Household
(1060073)	61	Yes
(1068769)	57	No

Manage Household

▶ Previous Households

Search Existing Households Start New Household

- b. When starting a new household, you may need to create client records for other members of the household. For more information about creating client records and managing households, refer to the resources on the [Forms & Instructions](#) page of the MN HMIS website or contact the Helpdesk at mnhmis@icalliances.org.

Once a client record has been located or created for each member of the household, they can all be attached to the same Entry/Exit. Read on for instructions!

CREATE A NEW ENTRY/EXIT

1. Make sure that you are in EDA mode as your [Coordinated Entry Assessment](#) provider and have opened the record of the client you are adding to the Priority List.
 - a. **[Households Only]** If you are adding a household to the Priority List, you should have the head of household's record open.
2. Click on the [Entry/Exit](#) tab, then select [Add Entry/Exit](#).
3. Make the following selections in the [Project Start Data](#) pop-up:
 - a. [Household Members](#): Check the box next to the name of every household member being added to the Priority List.

- b. **Provider:** Your [Coordinated Entry Assessment](#) provider.
- c. **Type:** Select **Basic**.
- d. **Project Start Date:** The date the client was assessed.

Household Members

(234162) Two Parent Family

- (1001244) [blurred]
- (1002351) [blurred]
- (1001245) [blurred]

Project Start Data - (1001244) [blurred]

Provider *	ICA-Coordinated Entry Assessment-Training Provider (1353) ▼
Type *	Basic ▼
Project Start Date *	<input type="text"/> / <input type="text"/> / <input type="text"/>

4. Click on **Save & Continue** to proceed to the Coordinated Entry assessment.

FILL OUT A COORDINATED ENTRY ASSESSMENT

1. Fill out the Coordinated Entry assessment as accurately and completely as possible, paying special attention to the following:

[HENNEPIN COUNTY ONLY] CES RELEASE OF INFORMATION DATE

All clients participating in Hennepin County’s Coordinated Entry System must sign the Hennepin CES Release of Information (ROI). Enter the date this ROI was signed into the [CES Release of Information Date](#) field. A copy of the Hennepin ROI should be either uploaded to the client’s record in HMIS or stored at the assessor’s agency.

CES Release of Information Date






Note that the CES ROI is **different than the HMIS ROI. The HMIS ROI asks a client whether they consent to have their information shared statewide.*

[HOUSEHOLDS ONLY] HEAD OF HOUSEHOLD

Enter assessment information for the head of household **only**.

COORDINATED ENTRY ASSESSMENT SUB-ASSESSMENT



This data element is used to capture details about a Coordinated Entry assessment, such as an assessor’s contact information. It should be updated each time there is a new assessment.

 Coordinated Entry Assessment				
	Date of Assessment *	End Date	Assessor's Name	Assessor's Organization
 	03/14/2020		Jane Smith	MN Street Outreach Program
 	01/01/2020	03/13/2020	Jane Smith	MN Street Outreach Program














Showing 1-2 of 2

- a. Click on the [magnifying glass](#) to open the sub-assessment pop-up.
- b. Check for an active row without an [End Date](#).
 - i. If there is one, click on that row’s [edit pencil](#).
 - ii. In the [Edit Recordset](#) pop-up, enter an [End Date](#) that is **one day prior** to the client’s assessment date, then select [Save](#).

Edit Recordset - (1058691)

Coordinated Entry Assessment

Date of Assessment *	01 / 01 / 2020					
End Date						
Assessment Location	Remote					
Assessor's Name	Jane Smith					
Assessor's Organization	MN Street Outreach Program					

Because our test client is being assessed on 03/14/2020, this old **Coordinated Entry Assessment row should be given an **End Date** of 03/13/2020.*

- c. Click on [Add](#) and fill out the following fields:
 - i. [Date of Assessment](#): Enter the date of the client’s assessment.
 - ii. [Assessment Location](#): Enter the location where the assessment was completed.
 - iii. [Assessor Details \(Name, Phone, Etc.\)](#): Enter your information.
 - iv. [Assessment Type](#): Select the most accurate option.
 - v. [Assessment Level](#): Select **Housing Needs Assessment**.

- vi. **Prioritization Status:** Select **Placed on Prioritization List**. **Do not** choose the other option or the client **will not** appear on the Priority List.

Assessor's Phone	121.121.1212
Assessor's Email	janes@mnsop.org
Assessment Type	In Person
Assessment Level	Housing Needs Assessment
Prioritization Status	Placed on Prioritization List

Do not enter an **End Date** when adding this new row or the client **will not** appear on the Priority List.


Edit Recordset - (1058691)

Coordinated Entry Assessment

Date of Assessment *	01 / 01 / 2020
End Date	X
Assessment Location	Remote
Assessor's Name	Jane Smith

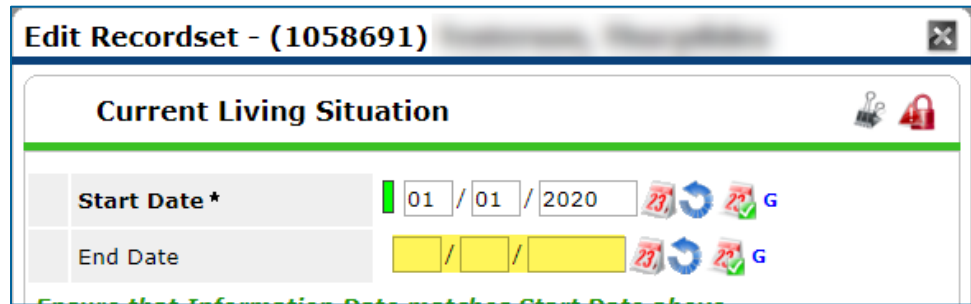
CURRENT LIVING SITUATION SUB-ASSESSMENT

This data element shows that contact was made between a client and a service provider and captures details about the client’s living situation at the time of the interaction. It should be updated each time there is a new assessment.

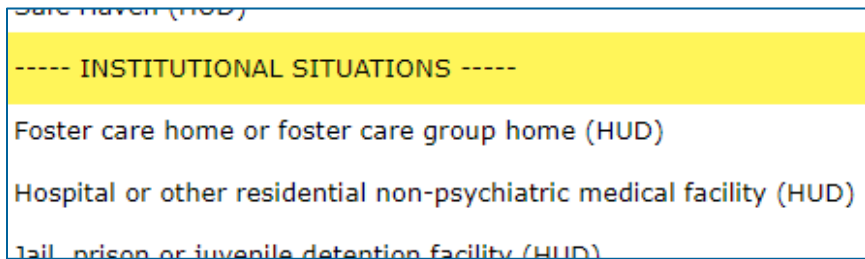
Current Living Situation					
	Start Date *	End Date	Current Living Situation	Is client going to have their current living situ within 14 days?	
	02/01/2020		Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)	No (HUD)	
Showing 1-2 of 2					

- a. Click on the **magnifying glass** to open the sub-assessment pop-up.
- b. Check for an active row without an **End Date**.
 - i. If there is one, click on that row’s **edit pencil**.

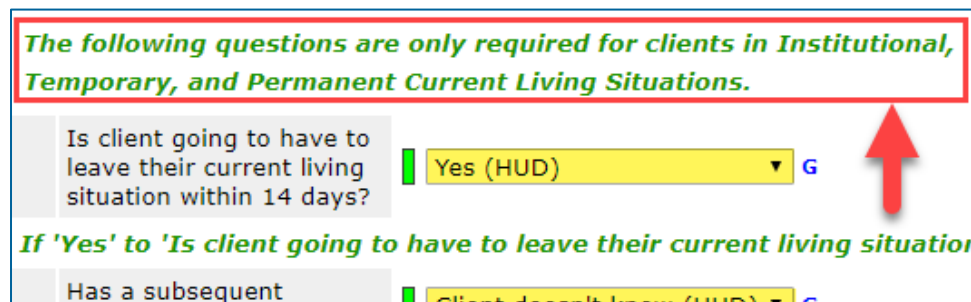
- ii. In the [Edit Recordset](#) pop-up, enter an [End Date](#) that is **one day prior** to the client’s assessment date, then select [Save](#).



- c. Click on [Add](#) and fill out the following fields:
 - i. [Start Date](#): Enter the date of the client’s assessment.
 - ii. [Information Date](#): Same as the [Start Date](#).
 - iii. [Location Details](#): **[Optional]** Enter more detail about the client’s location.
 - iv. [Current Living Situation](#): Select the most accurate option.
 - v. [Living Situation verified by](#): Click on [Lookup](#), then select your Coordinated Entry Assessment provider.
 - vi. [Conditional Questions](#): Depending on the value selected for the [Current Living Situation](#) field, you may be required to answer additional questions to further describe the client’s living situation.



Each **Current Living Situation value is categorized as a Homeless, Institutional, Temporary, or Permanent Situation. Read the green helper text carefully to decide if additional questions need to be answered.*



PRIORITIZATION TOOL (VI-SPDAT)

In some communities, a VI-SPDAT score is used to determine what type of intervention best meets a client’s needs.

- a. Find the VI-SPDAT sub-assessment that should be used for your client – [VI-SPDAT](#) (Single Adults), [TAY-VI-SPDAT](#) (Youth), or [VI-FSPDAT](#) (Families) – and click on the **Add** button.

	Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZ DAILY FU
	12/13/2018	0	0	4	2
	02/28/2017	0	0	0	0

Showing 1-3 of 3

Add

- b. Complete the entire assessment, then click on **Save** to generate a score.
- c. Check the [VI-SPDAT Override/Backlog Entry](#) sub-assessment and verify that there are no active override scores without an **End Date**.
 - i. If there is one, click on that row’s **edit pencil**.
 - ii. In the [Edit Recordset](#) pop-up, enter an **End Date** that is **one day prior** to the client’s assessment date, then select **Save**.

	Date of Assessment *	VI-SPDAT Type	Score	Override or Backlog?	End Date (Complete when new line is entered)
	/05/2017	Single	12	Override	

Add

EXISTING ASSESSMENT DATA

If the client has worked with other homeless service agencies before, data may already appear in the assessment. Review any existing assessment data and update information that is no longer accurate.

- 2. Select **Save & Exit** at the bottom of the assessment when you are finished entering data.

The client’s information should now appear on the Priority List report. Contact your Priority List Manager or the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.

UPDATE A CLIENT'S ASSESSMENT WITH NEW INFORMATION

When new information about a client becomes known, such as a change in their **Current Living Situation**, their Coordinated Entry assessment should be updated.

In this section, you will...

- ✓ Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- ✓ Update the interim assessment with new information.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your [Coordinated Entry Assessment](#) provider.
2. Open the client record of the individual or head of household whose information is being updated. When the [Back Date Mode](#) pop-up appears, select **Use Current System Date**.
3. Click on the **Entry/Exit** tab and find the [Coordinated Entry Assessment](#) provider's Entry/Exit row.
 - a. If the client was added to the Priority List by another agency in your Continuum of Care (CoC), you will be updating the entry created by that agency.
4. Select the **Interims** icon, then click on **Add Interim Review** in the [Interim Reviews](#) pop-up.

Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
ICA-Coordinated Entry Assessment-Training Provider (1353)	01/01/2020				

5. Make the following selections in the [Add Interim Review](#) pop-up:
 - a. **Household Members**: Check the box next to the name of every household member.
 - b. **Interim Review Type**: Select **Update**.
 - c. **Review Date**: The date the new information was reported.

Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update
Review Date *	<input type="text"/> / <input type="text"/> / <input type="text"/>

6. Click on **Save & Continue** to proceed to the interim assessment.

UPDATE AN INTERIM ASSESSMENT




1. Update the assessment where necessary, paying special attention to the following:

[HOUSEHOLDS ONLY] HEAD OF HOUSEHOLD

Update assessment information for the head of household only.

CURRENT LIVING SITUATION SUB-ASSESSMENT



If the client’s [Current Living Situation](#) has changed or if it has been some time since a [Current Living Situation](#) value was last recorded, add a new row to this sub-assessment. It is **not** necessary to add a new sub-assessment row each time the client’s assessment is updated.









 Current Living Situation				
	Start Date *	End Date	Current Living Situation	Is client going to have their current living situ within 14 days?
 	02/01/2020		Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)	No (HUD)

Showing 1-2 of 2

- a. Click on the [magnifying glass](#) to open the sub-assessment pop-up.
- b. Check for an active row without an [End Date](#).
 - i. If there is one, click on that row’s [edit pencil](#).
 - ii. In the [Edit Recordset](#) pop-up, enter an [End Date](#) that is **one day prior** to the date you are updating the client’s assessment, then select [Save](#).

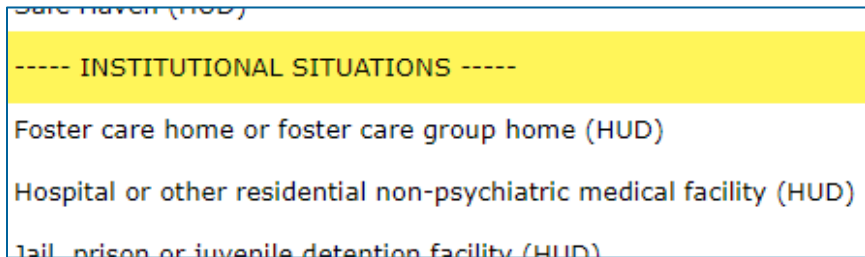
Edit Recordset - (1058691) ✕

Current Living Situation  

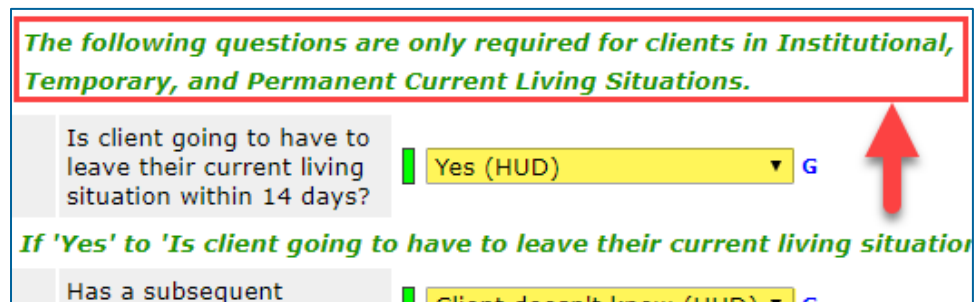
Start Date *	01 / 01 / 2020				
End Date					

- c. Click on [Add](#) and fill out the following fields:
 - i. [Start Date](#): Enter the date of the client’s assessment.
 - ii. [Information Date](#): Same as the [Start Date](#).
 - iii. [Location Details](#): **[Optional]** Enter more detail about the client’s location.

- iv. **Current Living Situation:** Select the most accurate option.
- v. **Living Situation verified by:** Click on **Lookup**, then select your Coordinated Entry Assessment provider.
- vi. **Conditional Questions:** Depending on the value selected for the **Current Living Situation** field, you may be required to answer additional questions to further describe the client’s living situation.



Each **Current Living Situation value is categorized as a Homeless, Institutional, Temporary, or Permanent Situation. Read the green helper text carefully to decide if additional questions need to be answered.*



VI-SPDAT – CORRECT A SCORING ERROR

An existing VI-SPDAT score can be updated if a mistake was made when it was first entered.

- a. Find the score that was entered incorrectly and click on its **edit pencil**.

VI-SPDAT for Individuals v2.0						
	Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SEVERITY OF DISABILITY	D. TOTAL SCORE
	08/15/2019	0	0	0	0	0
	12/13/2018	0	0	4	2	2
	02/28/2017	0	0	0	0	0

- b. Update any inaccurate answers, but **do not** change the [Start Date](#). When you are finished making updates, click on [Calculate](#) to see how the score has changed.
- c. Select [Save](#) to close the [Edit Recordset](#) pop-up.

VI-SPDAT – ENTER AN OVERRIDE SCORE

A client’s calculated VI-SPDAT score can be replaced by an override score if your community’s Coordinated Entry policies allow it.

- a. Find the [VI-SPDAT Override/Backlog Entry](#) sub-assessment and click on the [magnifying glass](#) to open the sub-assessment pop-up.
- b. Check for an active row without an [End Date](#).
 - i. If there is one, click on that row’s [edit pencil](#).
 - ii. In the [Edit Recordset](#) pop-up, enter an [End Date](#) that is **one day prior** to the date you are updating the client’s assessment, then select [Save](#).

	Date of Assessment *	VI-SPDAT Type	Score	Override or Backlog?	End Date (Complete when new line is entered)
	/05/2017	Single	12	Override	

Add

- c. Click on the [Add](#) button and complete the following fields:
 - i. [Date of Assessment](#): Today’s date.
 - ii. [VI-SPDAT Type](#): Select the type that matches the client’s existing score.
 - iii. [Score](#): Select the client’s override score value.
 - iv. [Override or Backlog?](#): Choose **Override**.
 - v. [Notes](#): **[Optional]** Add notes about the Override score.

VI-SPDAT Override/Backlog Entry

Date of Assessment * / /

VI-SPDAT Type

Score

Override or Backlog?

Notes

EXISTING ASSESSMENT DATA

If the client has worked with other homeless service agencies before, data may already appear in the assessment. Review any existing assessment data and update information that is no longer accurate.

2. Select **Save & Exit** at the bottom of the assessment when you are finished entering data.

The client's updated information should now appear on the Priority List report. Contact your Priority List Manager or the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.

ADD A HOUSEHOLD MEMBER TO THE PRIORITY LIST

When a person joins a household, they can be added to the Priority List so that they are considered for housing opportunities with the rest of the household. Before proceeding, make sure that the person being added to the Entry/Exit already has a client record in HMIS. If they do not, refer to the section [Find or Create a Client Record in HMIS](#) for instructions on creating a new client record.

In this section, you will...

- ✓ Add a client to the Coordinated Entry Assessment Entry/Exit.
- ✓ Add an interim update to the Entry/Exit.
- ✓ Update the household size in the interim assessment.

ADD A HOUSEHOLD MEMBER TO AN ENTRY/EXIT

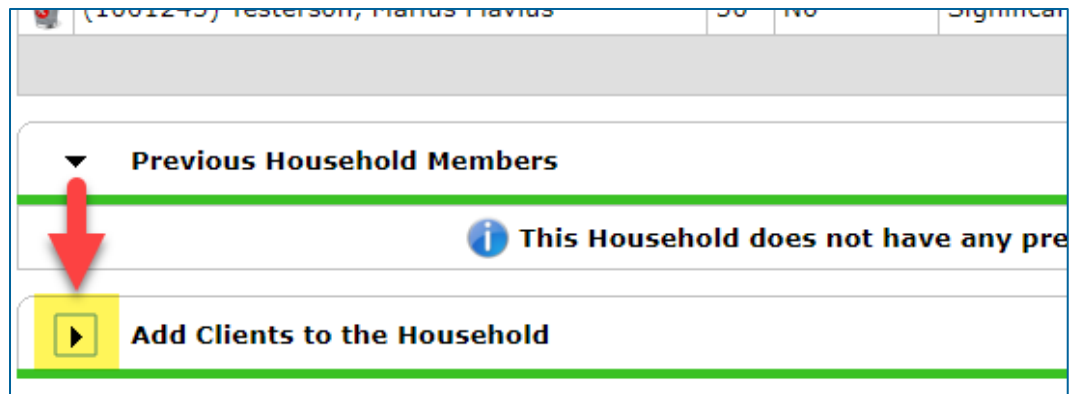
1. Click on **Enter Data As** and select your [Coordinated Entry Assessment](#) provider.
2. Open the client record of the head of household. When the [Back Date Mode](#) pop-up appears, select **Use Current System Date**.
3. Select the [Households](#) tab and find the household that includes everyone who is attached to the Coordinated Entry Assessment entry. If the household does not include the person being added to the Entry/Exit, do the following:
 - a. Click on **Manage Household** to open the [Household Information](#) pop-up.

▼ (234162) Two Parent Family			
Name	Age	Head of Household	Rel Head Hou
(1001244)	30	Yes	Self
(1002351)	5	No	Dau
(1001245)	50	No	Sig

Manage Household

- b. Click on the **Add/Delete Household Members** button. Another pop-up window will appear.

- c. Click on the **arrow** next to [Add Clients to the Household](#) in the pop-up.



- d. Search for the client being added to the household. When they appear in the [Client Results](#) table, click on the **green circle** to select them, then click on **Continue**.
- e. In the [Household Members](#) table, update the following information for the new member:
 - i. [Relationship to Head of Household](#): Select the most accurate option.
 - ii. [Joined Household](#): Enter the date that the client joined the household.













Household Members					
Name	Age	Head of Household	Relationship to Head of Household	Joined Household *	
(1001244)	30	Yes	Self	10 / 13 / 2016	
(1023540)		No	-Select-	03 / 13 / 2020	
(1002351)	5	No	Daughter	10 / 13 / 2016	
(1001245)	50	No	Significant other	10 / 13 / 2016	

Add/Delete Household Members

- f. If necessary, the [Household Type](#) field can be updated at this time.
 - g. Click on **Save & Exit** to close the [Household Information](#) pop-up.
4. Click on the **Entry/Exit** tab and find the Entry/Exit row for the [Coordinated Entry Assessment](#) provider.
 5. Select the **edit pencil** next to the [Project Start Date](#).

Entry / Exit				
Program	Type	Project Start Date	Exit Date	
ICA-Coordinated Entry Assessment-Training Provider (1353)	Basic	01/01/2020		

- Click on **Save & Continue** in the [Edit Project Start Data](#) pop-up to open the entry assessment.
- Click on **Include Additional Household Members** in the household members table at the top of the entry assessment.

Household Members Associated with this Entry / Exit					
	Name	Head of Household		Project Start Date	
 	(1001244)	Yes		01/01/2020	
 	(1002351)	No		01/01/2020	
 	(1001245)	No		01/01/2020	
<input type="button" value="Include Additional Household Members"/>					<input type="button" value="Show"/>

- Check the box next to the client being added to the Entry/Exit and enter the date they joined the household in the [Project Start Date](#) field.




Household Members

To include additional Household Members, click the box beside each name. Only ONE Household may be selected at a time.

(234162) Two Parent Family

- (1001244)
- (1023540)
- (1002351)
- (1001245)

Edit Project Start Data - (1001244)

Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Type	Basic
Project Start Date *	<input type="text"/> / <input type="text"/> / <input type="text"/>    <input type="text"/> : <input type="text"/> : <input type="text"/> <input type="text"/>

- Click on **Save & Continue** to close the [Edit Project Start Data](#) pop-up, then close the entry assessment.

Now that the client has been added to the Entry/Exit, the household size needs to be updated in the Coordinated Entry assessment. Continue reading for instructions!

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Make sure that you are in EDA mode as your [Coordinated Entry Assessment](#) provider and have opened the head of household’s record.
2. Click on the [Entry/Exit](#) tab and find the [Coordinated Entry Assessment](#) provider’s Entry/Exit row.
 - a. If the client was added to the Priority List by another agency in your Continuum of Care (CoC), you will be updating the entry created by that agency.
3. Select the [Interims](#) icon, then click on [Add Interim Review](#) in the [Interim Reviews](#) pop-up.

Entry / Exit						
Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
ICA-Coordinated Entry Assessment Provider (1353)	01/01/2020					
Entry / Exit		Showing 1-1 of 1				

4. Select the following options in the [Add Interim Review](#) pop-up:
 - a. [Household Members](#): Check the box next to the name of every household member.
 - b. [Interim Review Type](#): Select **Update**.
 - c. [Review Date](#): The date the household member was added to the Priority List.

Household Members

(234162) Two Parent Family

- (1001244)
- (1002351)
- (1001245)

Interim Review Data

Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update ▼
Review Date *	<input type="text"/> / <input type="text"/> / <input type="text"/>

5. Click on [Save & Continue](#) to proceed to the interim assessment.

UPDATE THE HOUSEHOLD SIZE IN THE ASSESSMENT

1. In the interim assessment, scroll down to the [Household Size](#) questions.
2. Make updates to the [Household Size](#) fields to accurately show how many household members are seeking a housing placement through Coordinated Entry.

which tribe are you an enrolled member?	Select
Household Type	Family G
Household Size: Total # of Persons	G
Household Size: Total # of Adults (18+)	G
Household Size: Total # of Children (17 and under)	G
Family Type	-Select- G

The **Household Size question series is what determines how many household members are counted on the Priority List report!*

3. When you are finished making updates, scroll down to the bottom of the assessment and click on **Save & Exit**.

The household’s new composition should now be reflected on the Priority List report. Contact your Priority List Manager or the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.

REMOVE A CLIENT FROM THE PRIORITY LIST







When a person leaves a household or becomes ineligible for placement in homeless-dedicated housing, they should be removed from the Priority List so that they are not considered for housing opportunities. If the person in question is the head of household, then **all** household members must be removed from the Priority List.

In this section, you will...

- ✓ Add exit data to the Coordinated Entry Assessment Entry/Exit.
- ✓ Fill out the exit assessment as completely and accurately as possible.
- ✓ Add an interim update to the Entry/Exit. (If necessary)
- ✓ Update the household size in the interim assessment. (If necessary)

ADD EXIT DATA

1. Click on **Enter Data As** and select your [Coordinated Entry Assessment](#) provider.
2. Open the record of the client being removed from the Priority List. When the [Back Date Mode](#) pop-up appears, select **Use Current System Date**.
3. Click on the **Entry/Exit** tab and find the [Coordinated Entry Assessment](#) provider's Entry/Exit row.
 - a. If the client was added to the Priority List by another agency in your Continuum of Care (CoC), you will be updating the entry created by that agency.
4. Select the **edit pencil** next to the empty [Exit Date](#) field.

Entry / Exit						
Program		Project Start Date	Exit Date	Interims	Follow Ups	Client
Coordinated Entry Assessment Provider (1353)		01/01/2020	 			

Entry / Exit Showing 1-1 of 1

5. Fill out the following fields in the [Edit Exit Data](#) pop-up:
 - a. **Household Members**: Check the box next to the name of every household member who will be leaving the Priority List. If the head of household is being removed from the Priority List, check all of the boxes.
 - b. **Exit Date**: The date that the client is being removed from the Priority List.
 - c. **Destination**: Select the most accurate answer.

Household Members




(234162) Two Parent Family

(1001244) [REDACTED]

(1002351) [REDACTED]

(1001245) [REDACTED]

Edit Exit Data - (1001244) [REDACTED]

Exit Date *	<input type="text"/> / <input type="text"/> / <input type="text"/>    <input type="text"/> : <input type="text"/> : <input type="text"/> <input type="text"/>
Reason for Leaving	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>
Destination *	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>

Optional fields like **Reason for Leaving can also be filled out at this time.*

6. Click on **Save & Continue** to proceed to the exit assessment.

FILL OUT AN EXIT ASSESSMENT

1. Fill out the assessment as accurately and completely as possible, paying special attention to the following:

[HOUSEHOLDS ONLY] HEAD OF HOUSEHOLD

Update the assessment for the head of household **only**. If another household member is being removed from the Priority List, **do not** fill out the exit assessment.

EXISTING ASSESSMENT DATA

If the client has worked with other homeless service agencies before, data may already appear in the assessment. Review any existing assessment data and update information that is no longer accurate.

2. Select **Save & Exit** at the bottom of the assessment when you are finished entering data.

If all clients have been removed from the Priority List, then data entry stops at this point. However, if there are still household members on the Priority List, the household size needs to be updated in the Coordinated Entry assessment. Continue reading for instructions!

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Make sure that you are in EDA mode as your [Coordinated Entry Assessment](#) provider and have opened the head of household’s record.
2. Click on the [Entry/Exit](#) tab and find the [Coordinated Entry Assessment](#) provider’s Entry/Exit row.
 - a. If the client was added to the Priority List by another agency in your Continuum of Care (CoC), you will be updating the entry created by that agency.
3. Select the [Interims](#) icon, then click on [Add Interim Review](#) in the [Interim Reviews](#) pop-up.

Entry / Exit					
Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
ICA-Coordinated Entry Assessment Provider (1353)	01/01/2020				
Entry / Exit		Showing 1-1 of 1			

4. Select the following options in the [Add Interim Review](#) pop-up:
 - a. [Household Members](#): Check the box next to the name of every household member still on the Priority List. **Do not** include any exited household members.
 - b. [Interim Review Type](#): Select **Update**.
 - c. [Review Date](#): The date the client was removed from the Priority List.

Household Members

(234162) Two Parent Family

- (1001244)
- (1002351)
- (1001245)

Interim Review Data

Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update ▼
Review Date *	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="text"/> : <input type="text"/> : <input type="text"/>

5. Click on [Save & Continue](#) to proceed to the interim assessment.

UPDATE THE HOUSEHOLD SIZE IN THE ASSESSMENT

1. In the interim assessment, scroll down to the [Household Size](#) questions.
2. Make updates to the [Household Size](#) fields to accurately show how many household members are seeking a housing placement through Coordinated Entry.

which tribe are you an enrolled member?	Select
Household Type	Family G
Household Size: Total # of Persons	G
Household Size: Total # of Adults (18+)	G
Household Size: Total # of Children (17 and under)	G
Family Type	-Select- G

The **Household Size question series is what determines how many household members are counted on the Priority List report!*

3. When you are finished making updates, scroll down to the bottom of the assessment and click on **Save & Exit**.

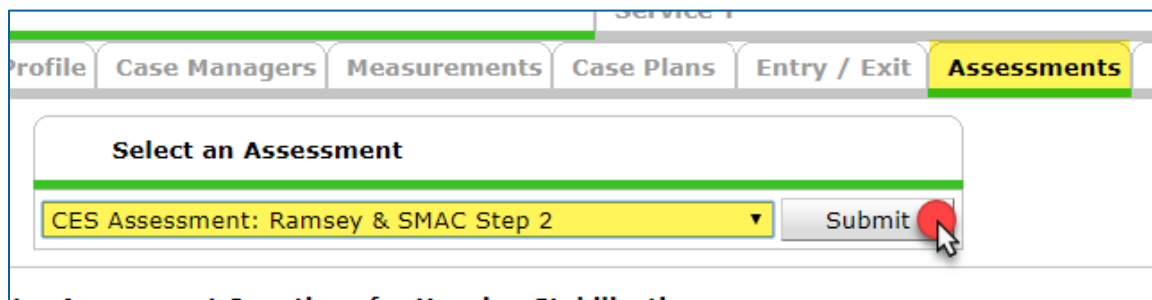
The household’s new composition should now be reflected on the Priority List report. Contact your Priority List Manager or the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.

APPENDIX A – VIEW A CLIENT’S MOST RECENT INFORMATION

While the Entry/Exit tab is the right place to enter assessment data, it’s not always the easiest place to find up-to-date details. Instead, it may be simplest to view a client’s most recent information within the **Assessments** tab.

THE ASSESSMENTS TAB

Review a person’s latest Coordinated Entry information by selecting the **Assessments** tab in their client record, then choosing the CES assessment used in your community. **Do not** enter data into the **Assessments** tab because that information may not appear on the Priority List.



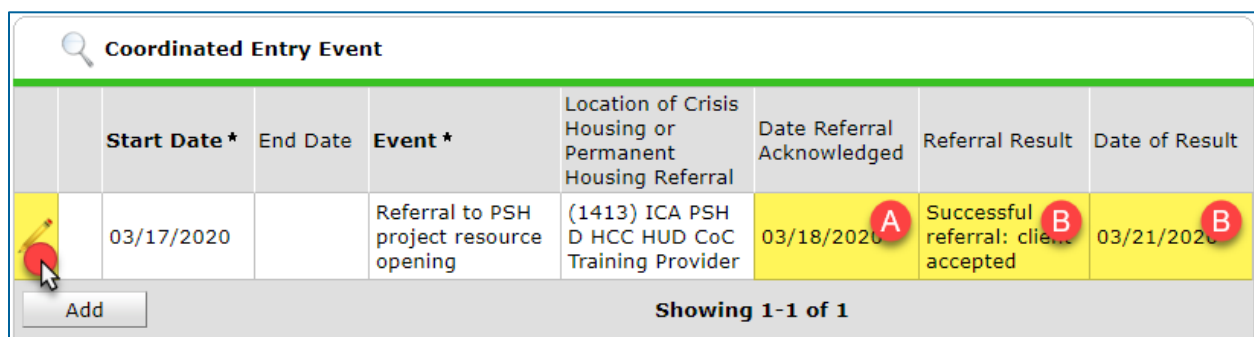
The screenshot shows a web interface with several tabs: Profile, Case Managers, Measurements, Case Plans, Entry / Exit, and Assessments. The Assessments tab is selected and highlighted in yellow. Below the tabs is a form titled "Select an Assessment". It features a dropdown menu with the text "CES Assessment: Ramsey & SMAC Step 2" and a "Submit" button. A red circle with a white arrow points to the Submit button.

After selecting the correct assessment from the drop-down, click on **Submit.*

DETERMINE A CLIENT’S REFERRAL STATUS

To check a person’s referral status, open their CES assessment in the **Assessments** tab. Then, find the **Coordinated Entry Event** sub-assessment and look for these markers:

- A. Housing providers enter a **Date Referral Acknowledged** when they first receive a referral.
- B. A **Referral Result** and **Date of Result** will be entered to mark a referral as successful or unsuccessful.



The screenshot shows a table titled "Coordinated Entry Event" with a search icon in the top left. The table has the following columns: Start Date *, End Date, Event *, Location of Crisis Housing or Permanent Housing Referral, Date Referral Acknowledged, Referral Result, and Date of Result. There is one row of data with a yellow background. A red circle with a white pencil icon (marker A) is over the Date Referral Acknowledged cell, and two red circles with white 'B' (marker B) are over the Referral Result and Date of Result cells. An "Add" button is at the bottom left, and "Showing 1-1 of 1" is at the bottom center.

Start Date *	End Date	Event *	Location of Crisis Housing or Permanent Housing Referral	Date Referral Acknowledged	Referral Result	Date of Result
03/17/2020		Referral to PSH project resource opening	(1413) ICA PSH D HCC HUD CoC Training Provider	03/18/2020	Successful referral: client accepted	03/21/2020

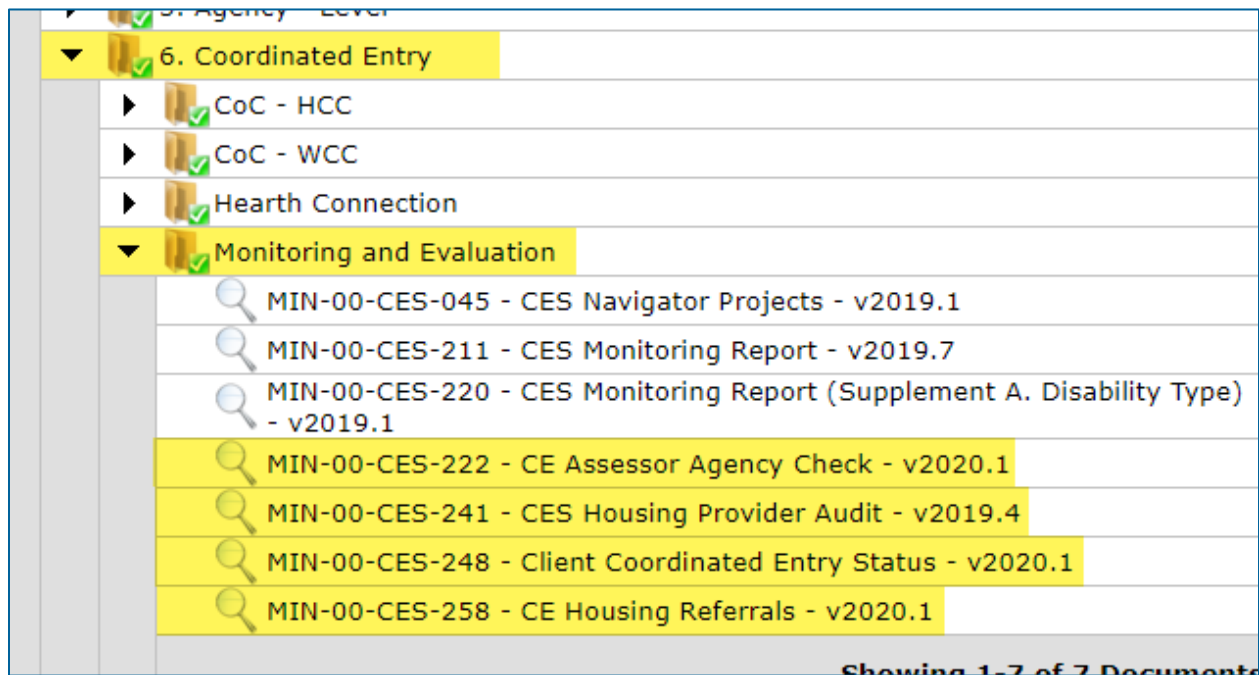
Click on the **edit pencil to see more referral details, like housing provider contact information. **Do not** enter data while in the **Assessments** tab.*

APPENDIX B – COORDINATED ENTRY REPORTS

ICA's Reporting and Evaluation Team has created a suite of reports that enables users to view clients' Coordinated Entry information.

There are four primary Coordinated Entry Reports that users should be aware of:

- [MIN-00-CES-222 - CE Assessor Agency Check Report](#): Assessors can use this report to check their data quality and see who they've added to the Priority List.
- [MIN-00-CES-241 - CES Housing Provider Audit](#): Housing providers can use this report to see their referral history.
- [MIN-00-CES-258 - CE Housing Referrals](#): Housing providers can use this report to view their pending referrals and resolved referrals for clients with open Coordinated Entry Assessment entries.
- [MIN-00-CES-248 - Client Coordinated Entry Status](#): This report is designed for shelter staff, case managers, outreach workers, assessors, and navigators to determine a client's Coordinated Entry status. The report shows whether a client was participating in Coordinated Entry and if they had a housing referral within the specified time frame.



The **Monitoring and Evaluation folder is home to several Coordinated Entry reports.*