MINNESOTA COORDINATED ENTRY
PRIORITY LIST MANAGER 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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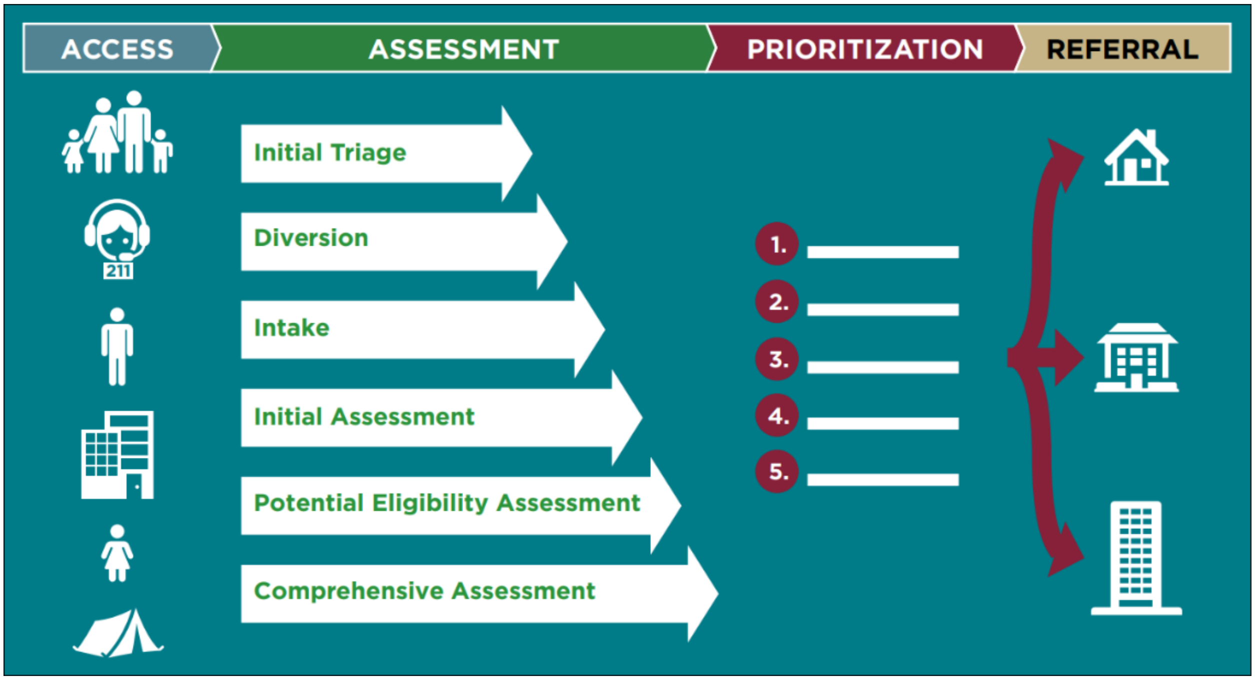
Last Updated on 6/22/2020

INTRODUCTION TO COORDINATED ENTRY IN HMIS

CORE ELEMENTS

HUD's Coordinated Entry Core Elements guidebook contains an overview of the federal agency's thinking around the essential elements of a Coordinated Entry System.



- **Access**, the engagement-point for persons experiencing a housing crisis, could look and function differently depending on the specific community. Persons (families, single adults, youth) might initially access the crisis response system by calling a crisis hotline or other information and referral resource, walking into an access point facility, or being engaged through outreach efforts.

- Upon initial access, CoC providers associated with Coordinated Entry likely will begin assessing the person's housing needs, preferences, and vulnerability. This Coordinated Entry element is referred to as **Assessment**. It is progressive; that is, potentially multiple layers of continuous information gathering occurring at various phases in the Coordinated Entry process, for different purposes, by one or more staff.

- During assessment, the person's needs and level of vulnerability may be documented for purposes of determining **Prioritization**. Prioritization helps the CoC manage its inventory of community housing resources and services, ensuring that those persons with the greatest need and vulnerability receive the supports they need to resolve their housing crisis.

- The final element is **Referral**. Persons are referred to available CoC housing resources and services in accordance with the CoC's documented prioritization guidelines.

ACCESS [ACCESS POINTS + CE ASSESSORS]

The first step in the Coordinated Entry process is **Access**. Through a variety of channels, including phone lines, drop-in centers, street outreach, and emergency shelters, individuals and families are connected with a Coordinated Entry assessor.

SETTING EXPECTATIONS FOR THOSE ACCESSING COORDINATED ENTRY SYSTEMS

Housing is not guaranteed for clients who are added to the Priority List. Coordinated Entry assessors should think of the assessment interview as a time when they should encourage clients to consider all available housing options, rather than presenting Coordinated Entry as the mechanism through which all clients should attempt to access housing resources. The fact that there is both a limited supply of homeless-dedicated housing, and a great need for that limited resource, unfortunately means that many people will never receive a housing referral through Coordinated Entry.

DETERMINE A CLIENT’S ELIGIBILITY

This meeting could result in one of the following outcomes:

1. Ineligibility is determined: The individual or family is ineligible to be connected with resources through Coordinated Entry. If available, information about resources that better suit their situation could be provided.
2. Added to Step 1: The individual or family is added to the Step 1 list/PL Step 1 tab of a report, which would be used to match clients with resources other than housing programs.
3. Added to HMIS Priority List: The individual or family is added to the HMIS Priority List, which is used to match clients with housing programs.
4. Added to Non-HMIS Priority List: The individual or family is added to the non-HMIS Priority List, which is used to match clients with housing programs. Those who are fleeing domestic violence and minor youth often fall into this category.

ASSESSMENT [CE ASSESSORS + PLMS]

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

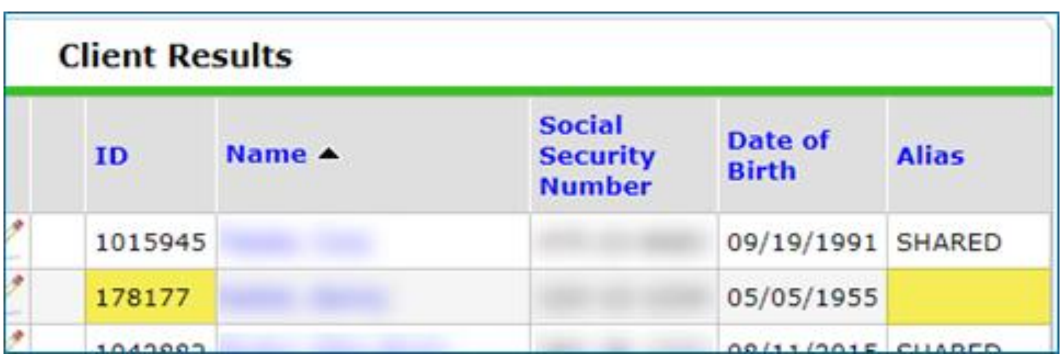
Only clients who have completed an **HMIS Release of Information** and consented to share their information statewide can be added to an HMIS Priority List. If a client does not wish to share their data, contact your Priority List Manager to connect them with the non-HMIS Priority List.

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

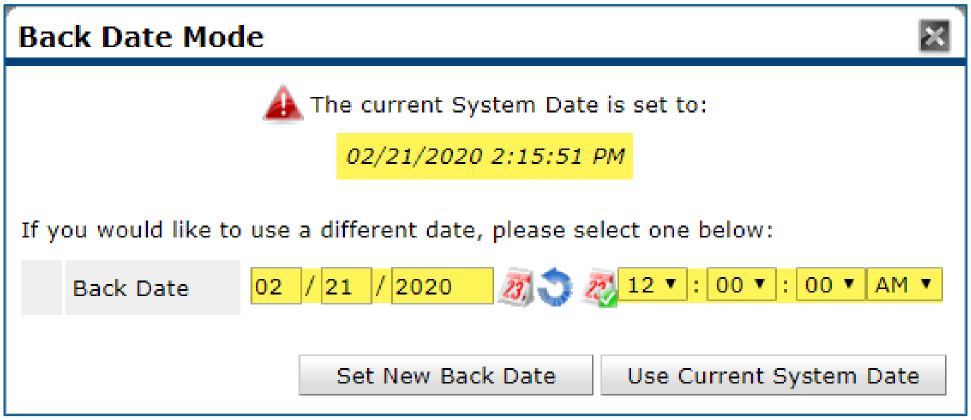
ID	Name	Social Security Number	Date of Birth	Alias
1015945	[illegible]	[illegible]	09/19/1991	SHARED
178177	[illegible]	[illegible]	05/05/1955	

**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**.

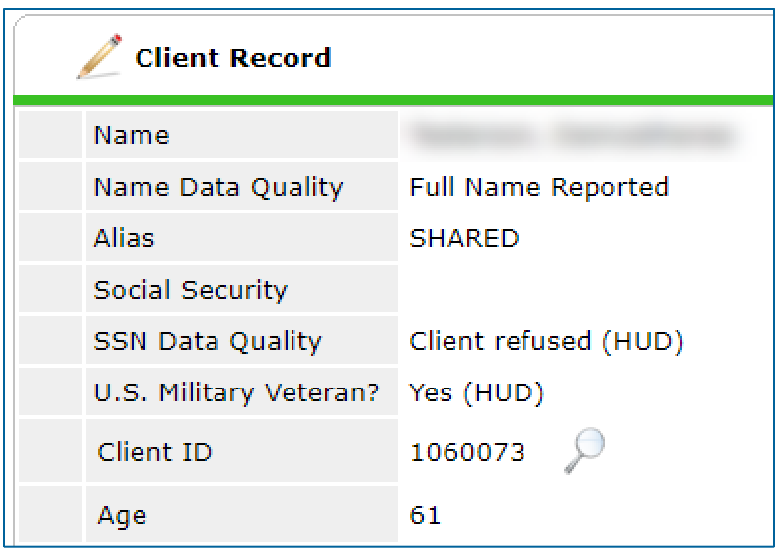
3. When prompted at the client record screen, enter the date of assessment into the Back Date Mode pop-up and click on **Set New Back Date**.

   a. If doing same-day data entry, select **Use Current System Date**.

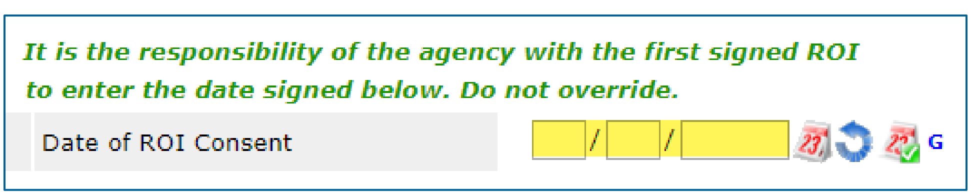


**Setting a new back date will temporarily change the system date. Any information you enter will be marked with that modified system date.*

4. Select the Client Profile tab and check that the Client Record section is not missing information.



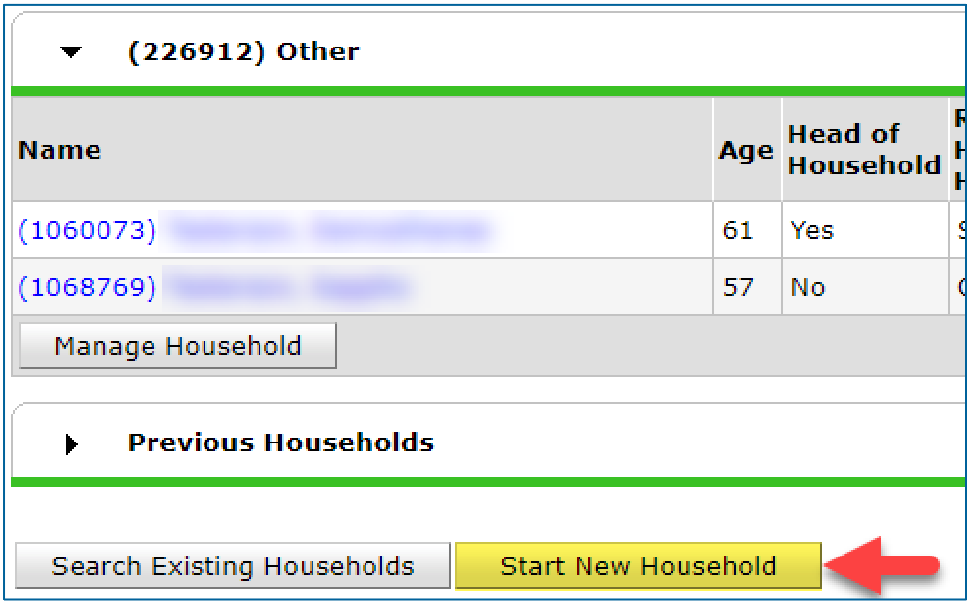
   a. If you created the client record, type **SHARED** in the Alias field, then fill out the Universal Profile with all available information. Don't forget to enter the **Date of ROI Consent**!



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!

    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**.

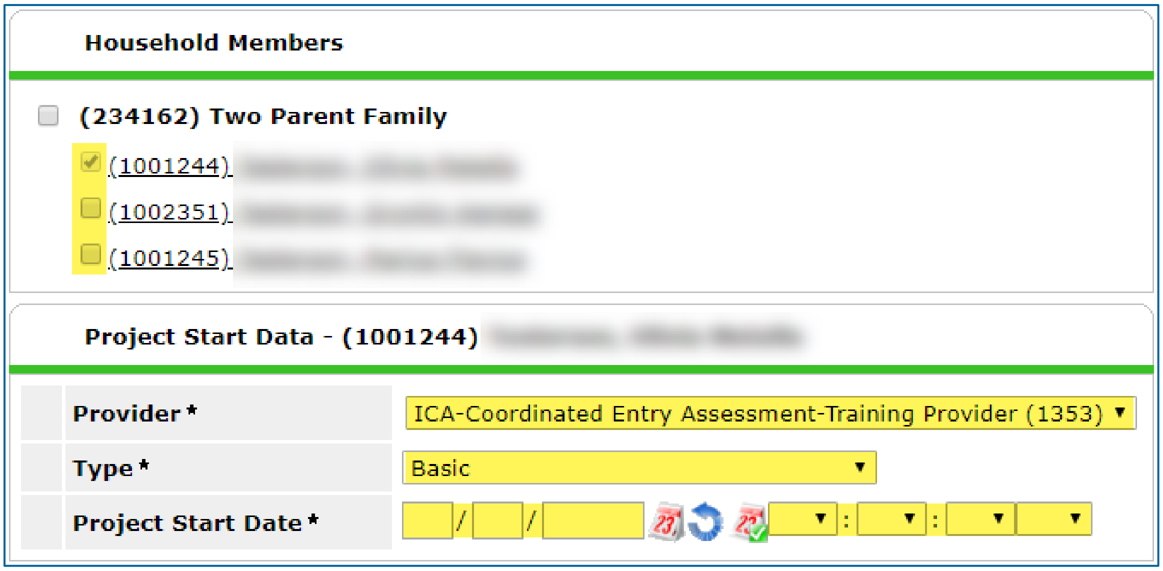
3. Make the following selections in the Project Start Data pop-up:

    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.



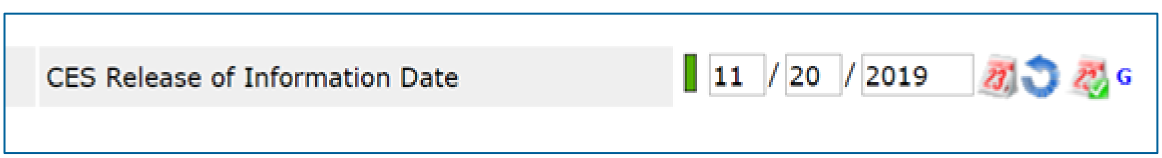
4. Click on **Save & Continue** to proceed to the Coordinated Entry assessment.

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.



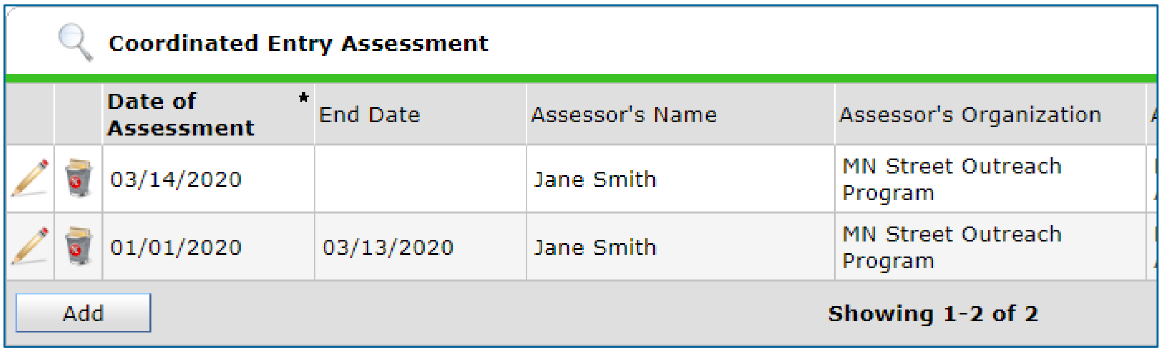
Note that the CES ROI is **different than the HMIS ROI. The HMIS ROI asks a client whether they consent to have their information shared statewide.*

[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.

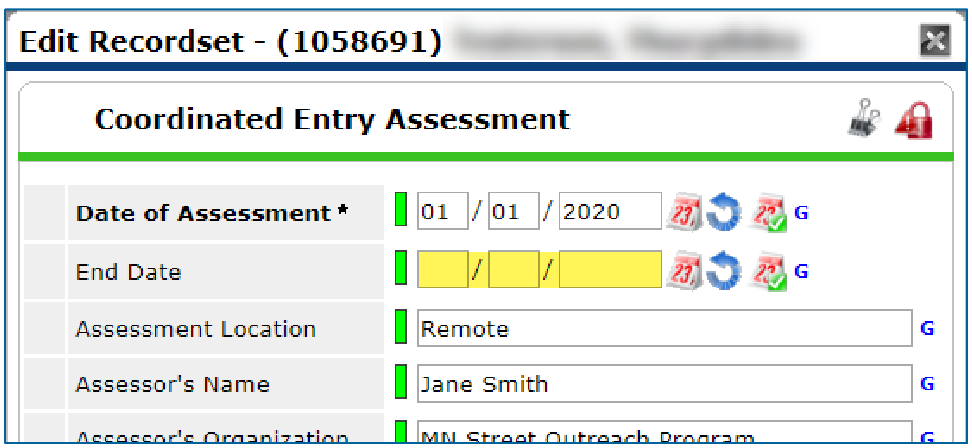


a. Click on the **magnifying glass** to open the sub-assessment pop-up.

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**.



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.

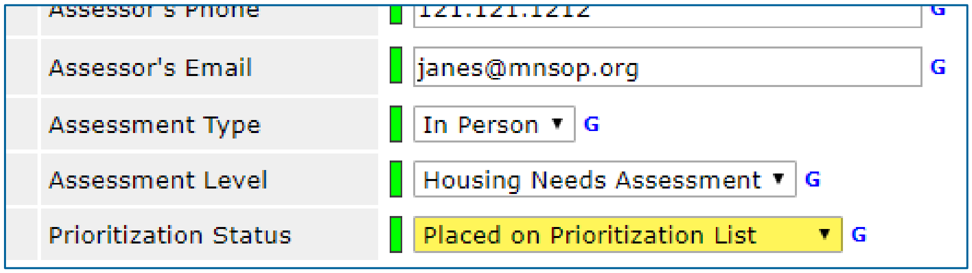
ii. Assessment Location: Enter the location where the assessment was completed.

iii. Assessor Details (Name, Phone, Etc.): Enter your information.

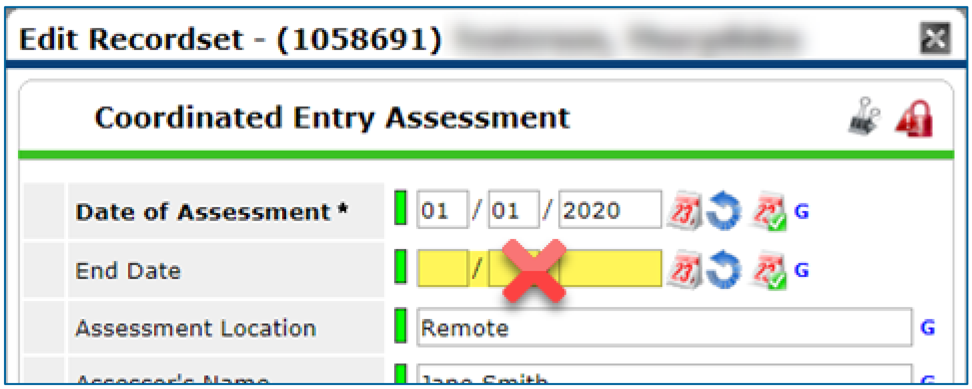
iv. Assessment Type: Select the most accurate option.

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.

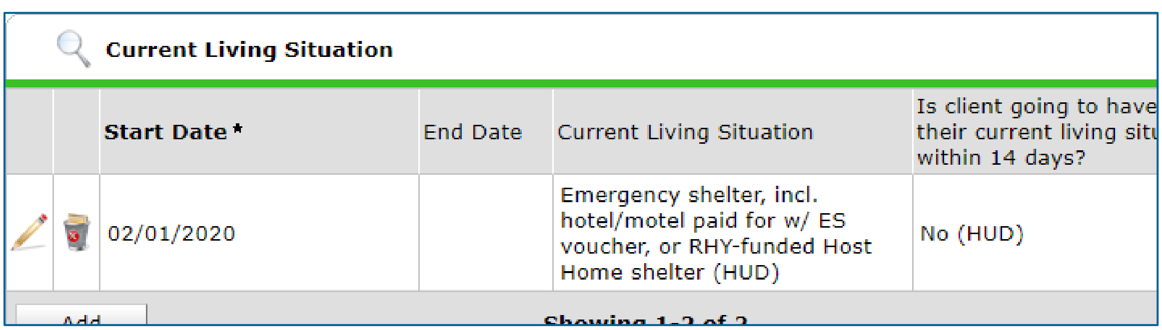


Do not enter an End Date when adding this new row or the client **will not** appear on the Priority List.



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.

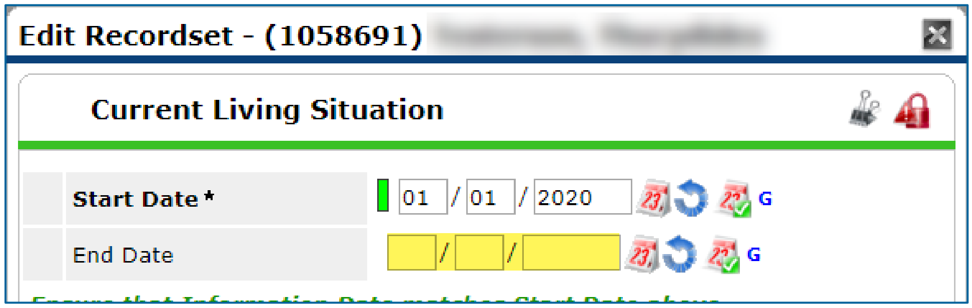


a. Click on the **magnifying glass** to open the sub-assessment pop-up.

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.

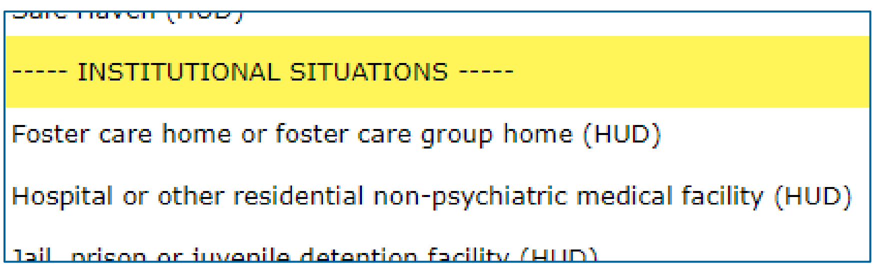
ii. Information Date: Same as the Start Date.

iii. Location Details: **[Optional]** Enter more detail about the client's location.

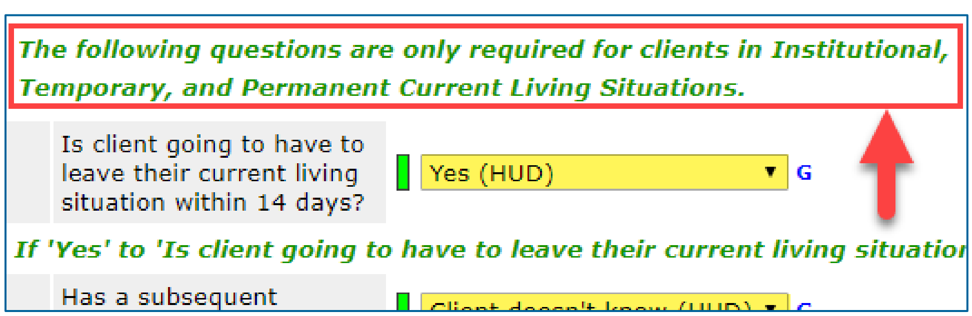
iv. Current Living Situation: Select the most accurate option.

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.



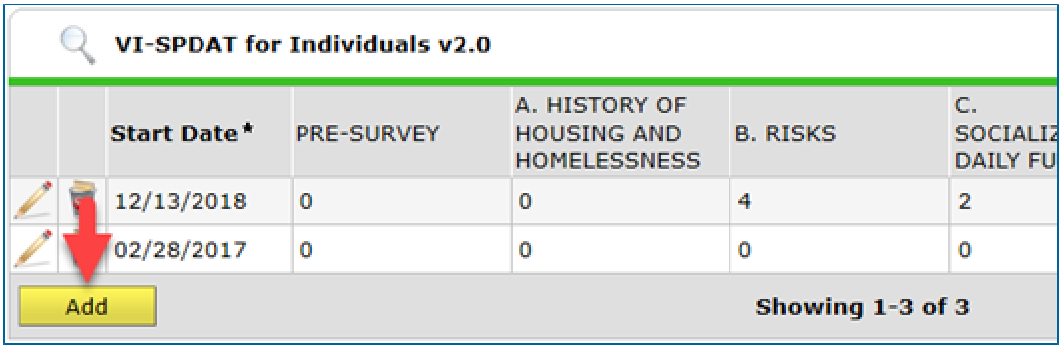
Each **Current Living Situation value is categorized as a Homeless, Institutional, Temporary, or Permanent Situation. Read the green helper text carefully to decide if additional questions need to be answered.*



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.

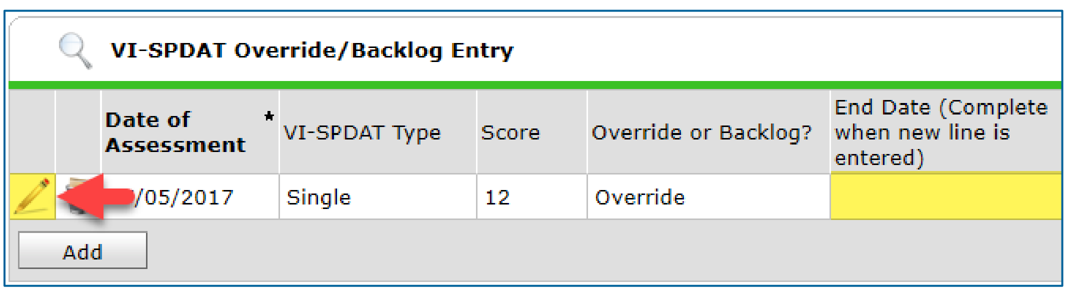


b. Complete the entire assessment, then click on **Save** to generate a score.

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**.



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

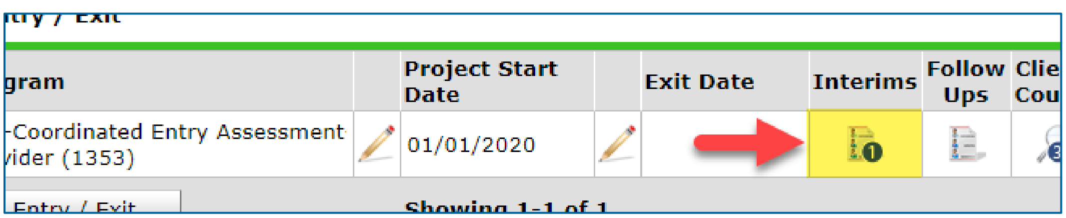
When new information about a client becomes known, such as a change in their **Current Living Situation**, their Coordinated Entry assessment should be updated.

In this section, you will…

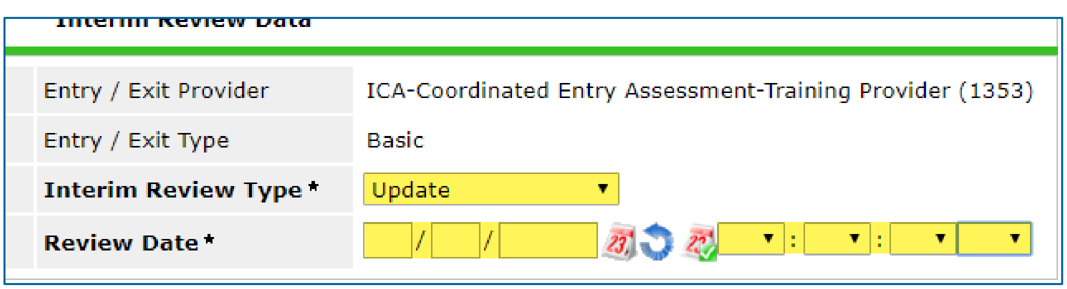
- ✓ Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- ✓ Update the interim assessment with new information.

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.



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.



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

UPDATE AN INTERIM ASSESSMENT

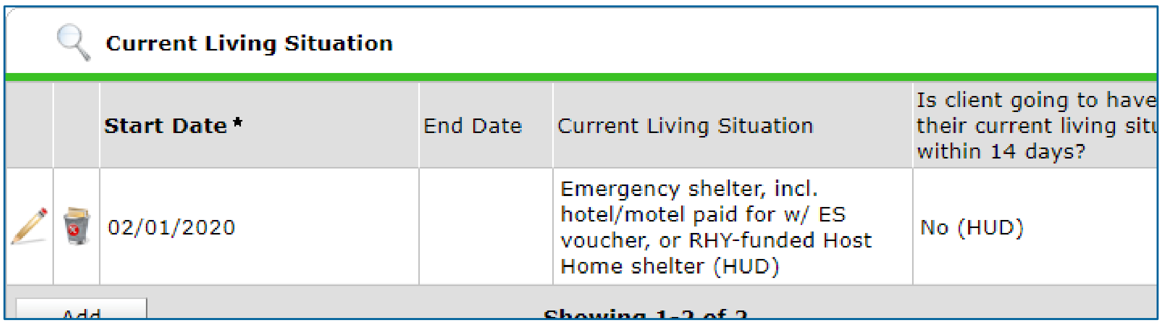
1. Update the assessment where necessary, paying special attention to the following:

[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.

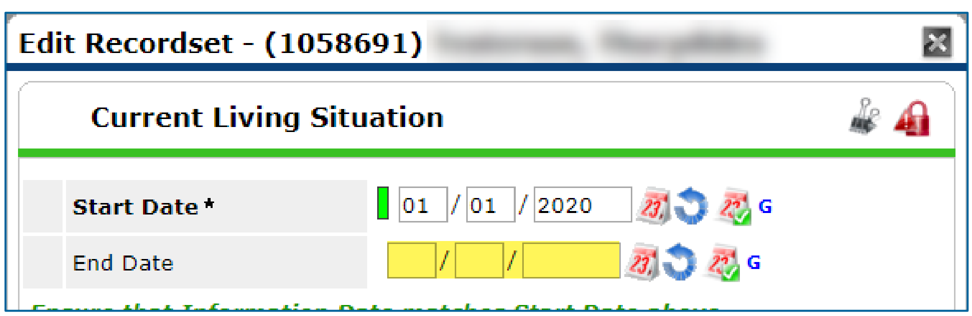


a. Click on the **magnifying glass** to open the sub-assessment pop-up.

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**.



c. Click on **Add** and fill out the following fields:

i. Start Date: Enter the date of the client's assessment.

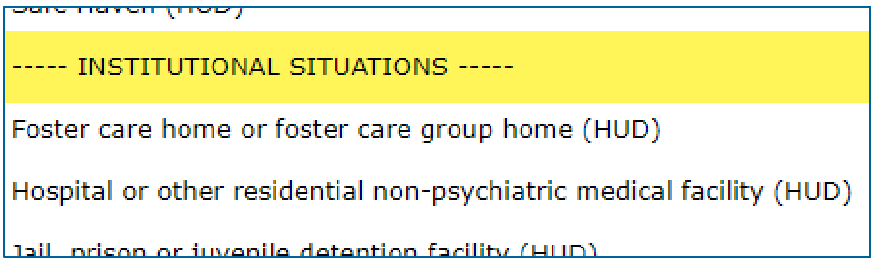
ii. Information Date: Same as the Start Date.

iii. Location Details: **[Optional]** Enter more detail about the client's location.

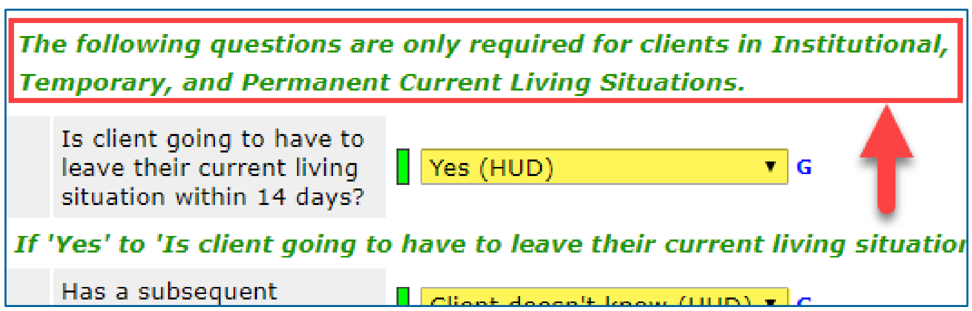
iv. Current Living Situation: Select the most accurate option.

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.



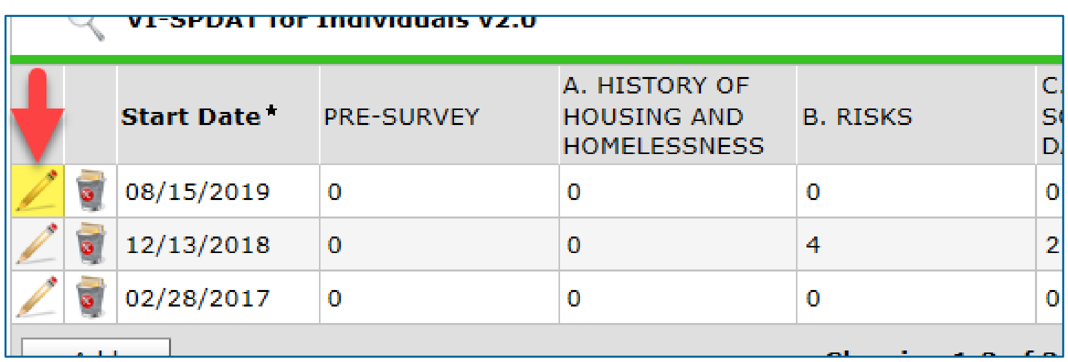
Each **Current Living Situation value is categorized as a Homeless, Institutional, Temporary, or Permanent Situation. Read the green helper text carefully to decide if additional questions need to be answered.*



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**.



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

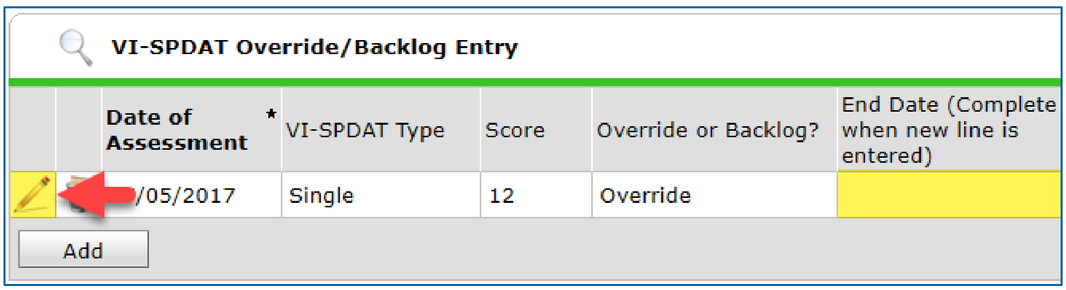
A client's calculated VI-SPDAT score can be replaced by an override score if your community's Coordinated Entry policies allow it.

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 **<u>one day prior</u>** to the date you are updating the client's assessment, then select **Save**.



c. Click on the **Add** button and complete the following fields:

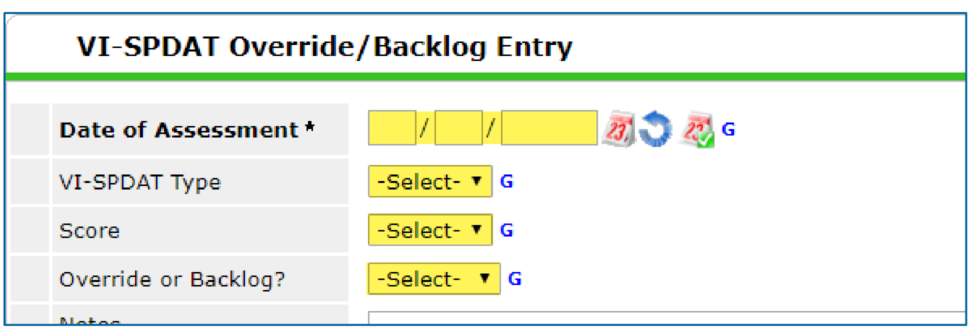
   i. Date of Assessment: Today's date.

   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.



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.

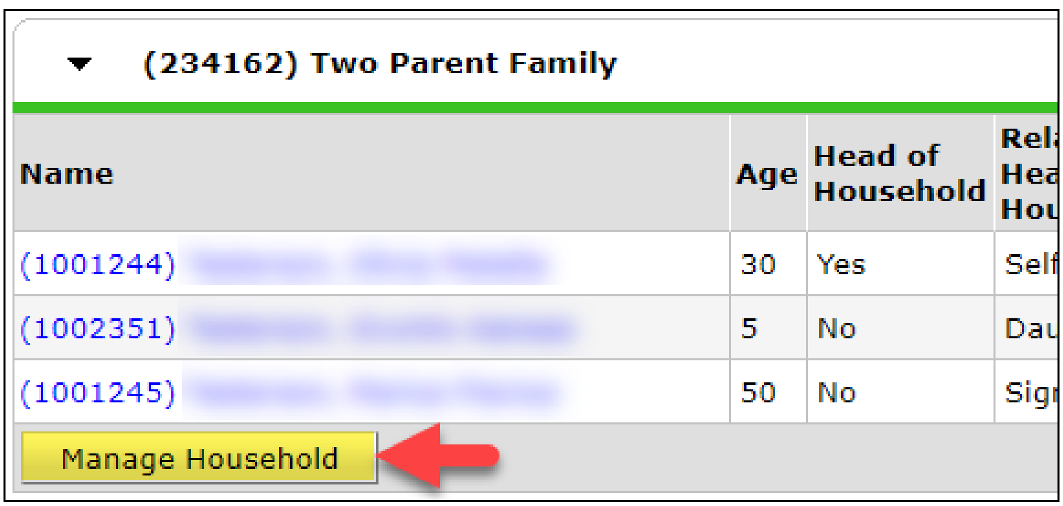
In this section, you will…

- ✓ 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

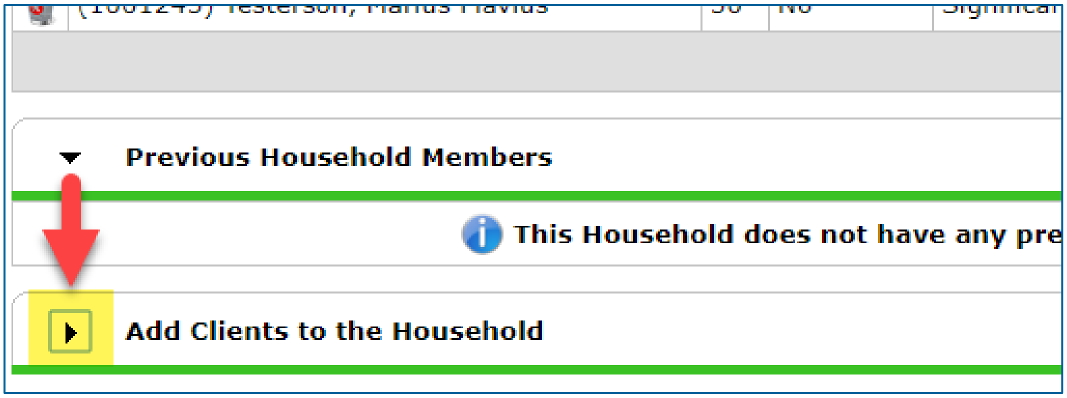
1. Click on **Enter Data As** and select your Coordinated Entry Assessment provider.
2. Open the client record of the head of household. When the Back Date Mode pop-up appears, select **Use Current System Date**.
3. Select the Households tab and find the household that includes everyone who is attached 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.



    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.

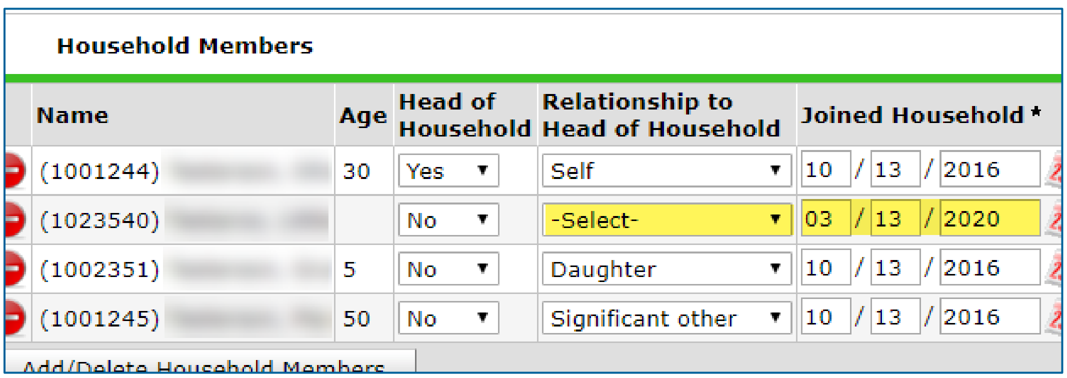


d. Search for the client being added to the household. When they appear in the Client Results table, click on the **green circle** to select them, then click on **Continue**.

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.

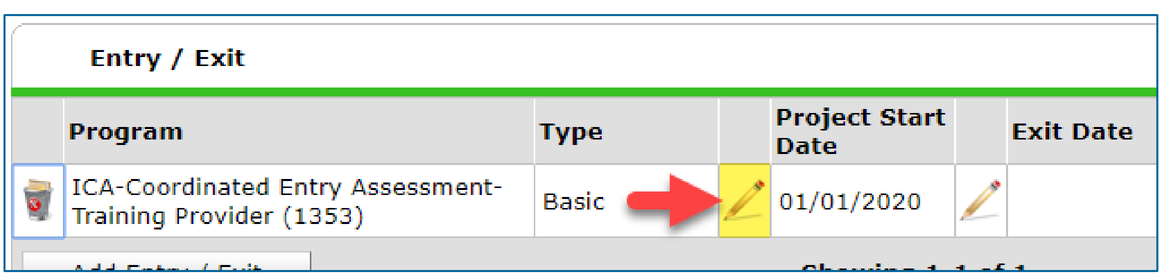


f. If necessary, the Household Type field can be updated at this time.

g. Click on **Save & Exit** to close the Household Information pop-up.

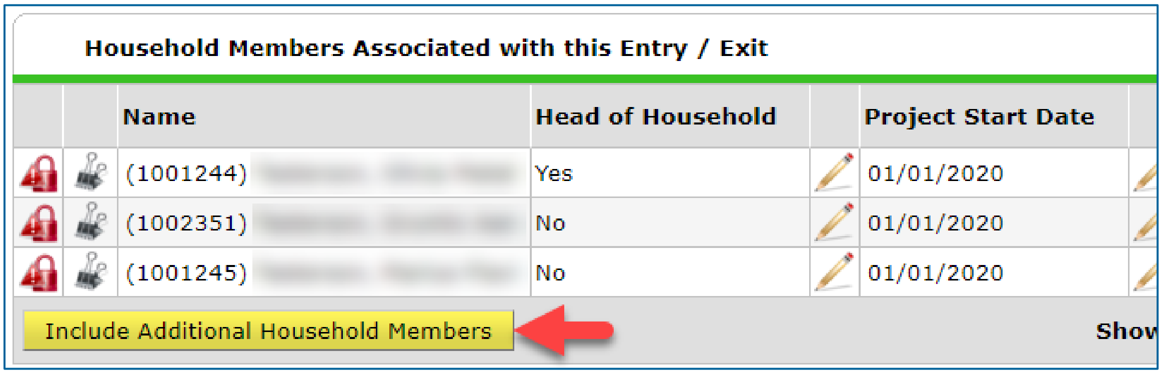
4. Click on the **Entry/Exit** tab and find the Entry/Exit row for the Coordinated Entry Assessment provider.

5. Select the **edit pencil** next to the Project Start Date.

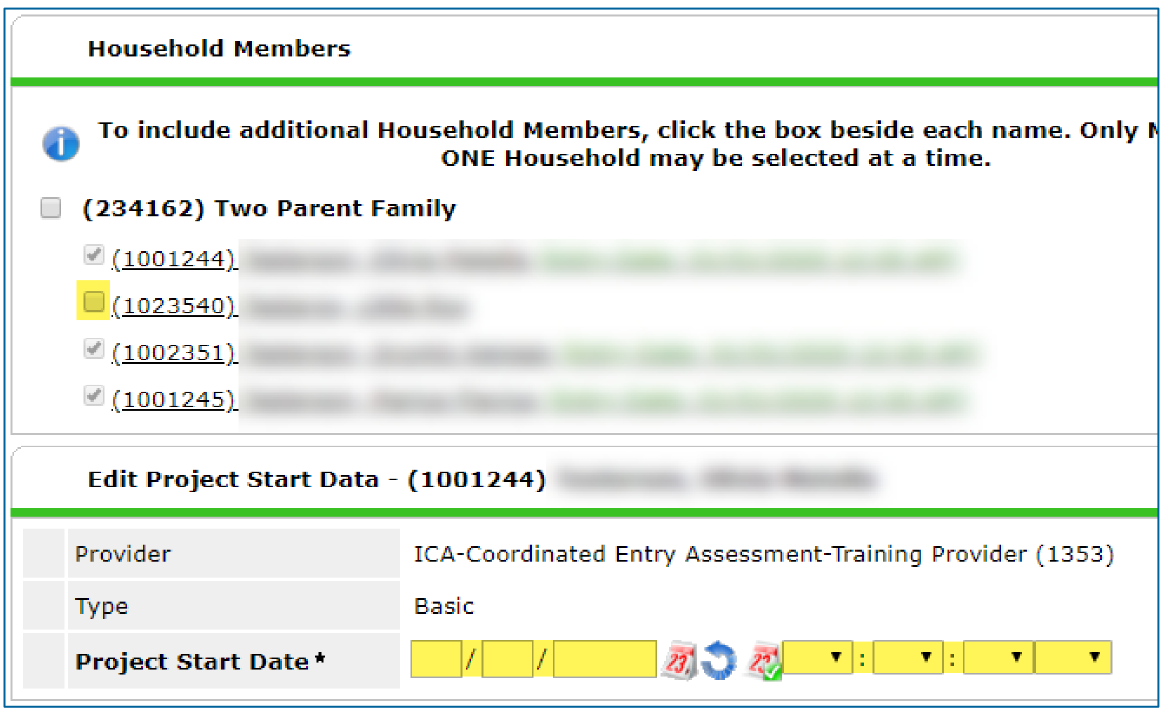


6. Click on **Save & Continue** in the Edit Project Start Data pop-up to open the entry assessment.

7. Click on **Include Additional Household Members** in the household members table at the top of the entry assessment.



8. 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.

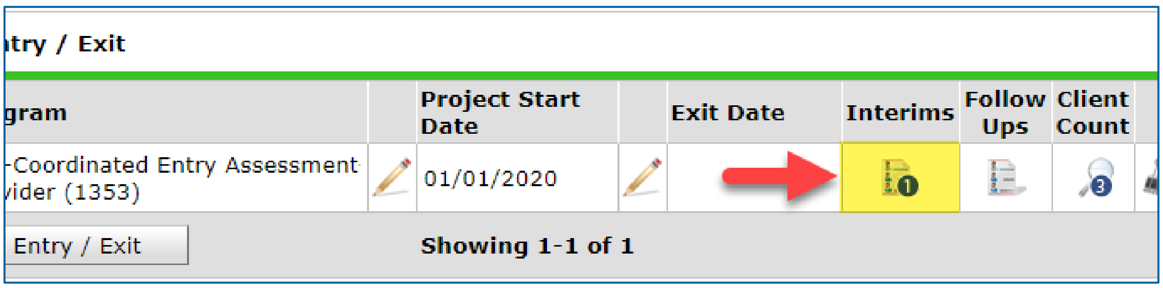


9. Click on **Save & Continue** to close the Edit Project Start Data pop-up, then close the entry assessment.

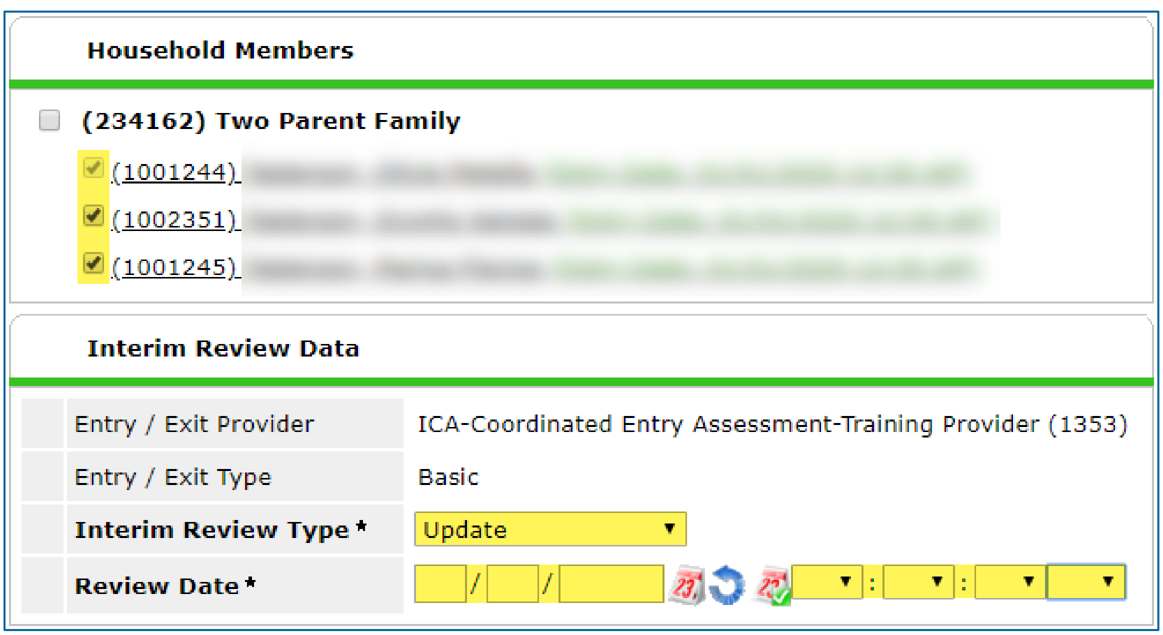
Now that the client has been added to the Entry/Exit, the household size needs to be updated in the Coordinated Entry assessment. Continue reading for instructions!

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.



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.

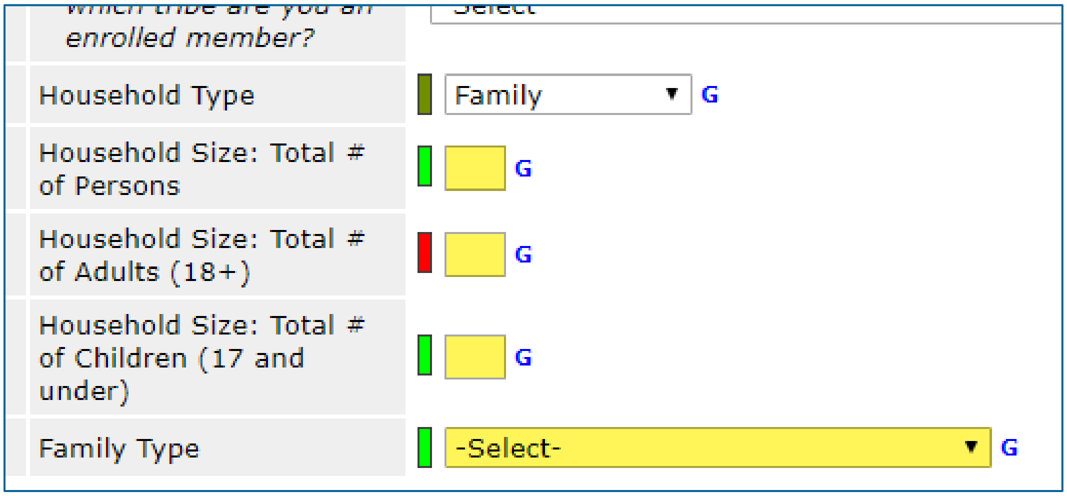


5. Click on **Save & Continue** to proceed to the interim assessment.

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.



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

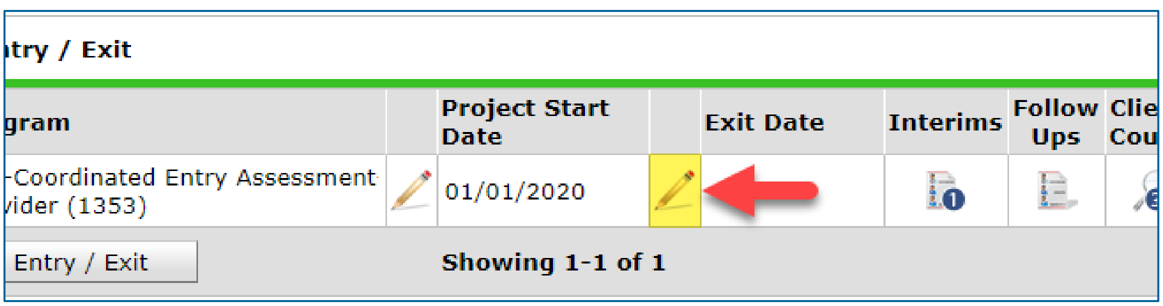
When a person leaves a household or becomes ineligible for placement in homeless-dedicated housing, they should be removed from the Priority List so that they are not considered for housing opportunities. If the person in question is the head of household, then **all** household members must be removed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

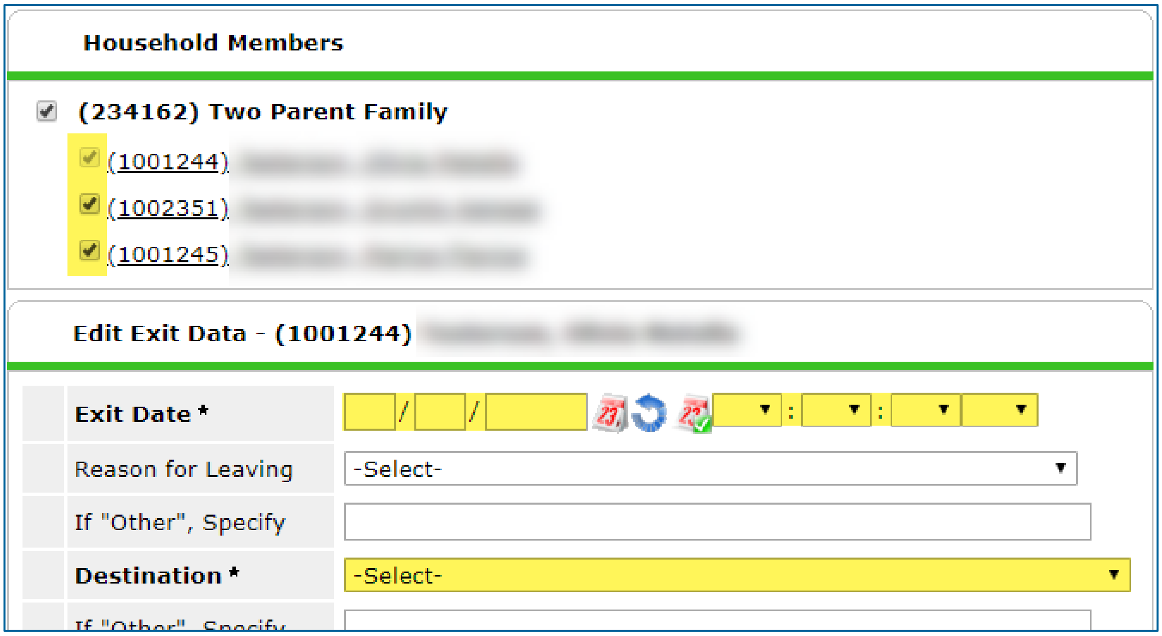
ADD EXIT DATA

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.



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.



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

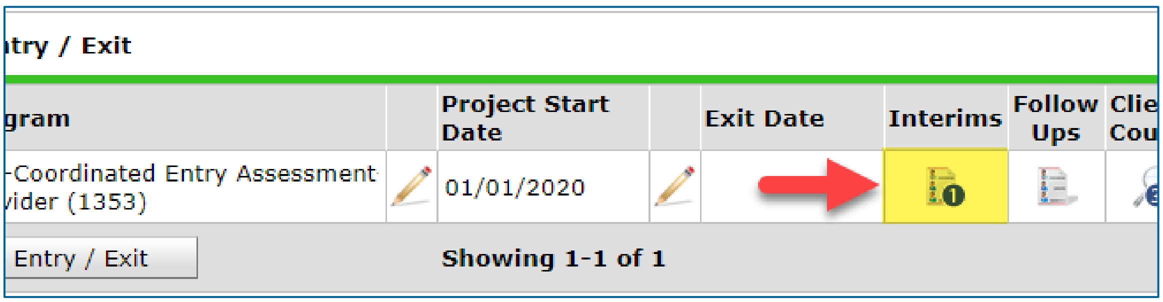
If the client has worked with other homeless service agencies before, data may already appear in the assessment. Review any existing assessment data and update information that is no longer accurate.

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

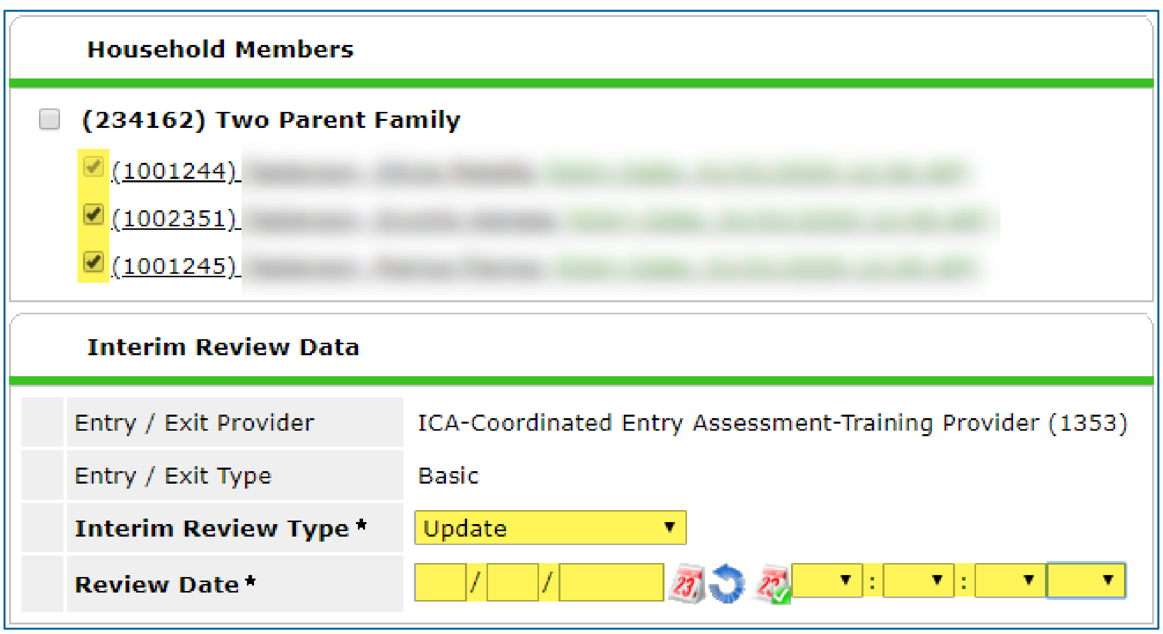
If all clients have been removed from the Priority List, then data entry stops at this point. However, if there are still household members on the Priority List, the household size needs to be updated in the Coordinated Entry assessment. Continue reading for instructions!

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.



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. **<u>Do not</u>** include any exited household members.
    b. Interim Review Type: Select **Update**.
    c. Review Date: The date the client was removed from the Priority List.

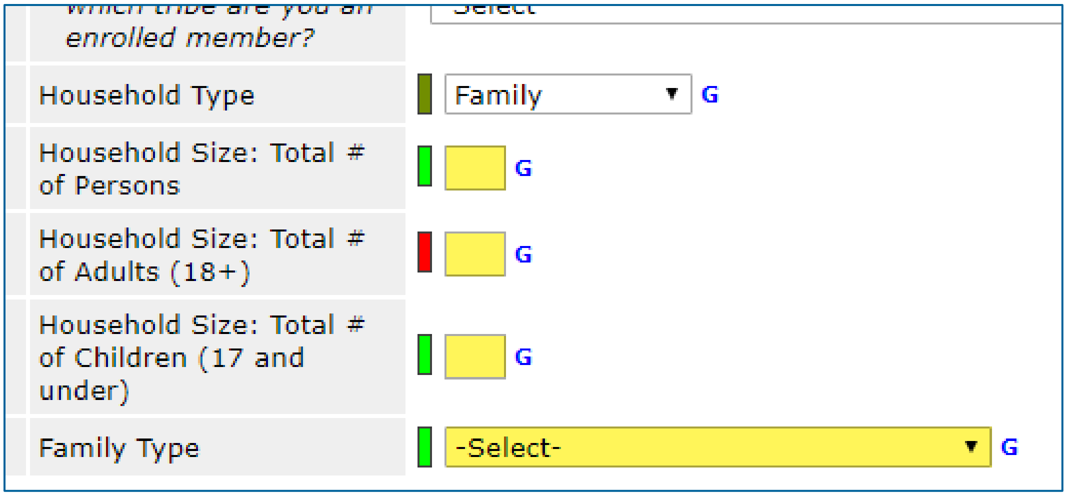


5. Click on **Save & Continue** to proceed to the interim assessment.

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.



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.

REFERRAL [PLMS + HOUSING PROVIDERS]

When a housing vacancy has been reported to a CoC's Priority List Manager (PLM), the PLM uses a Priority List report to determine who to refer to fill that vacancy. HMIS enables PLMs and housing providers to then communicate about the status of a referral. **Note: The term "client" will be used throughout this document to refer to a person experiencing homelessness.**

REFER A CLIENT TO A HOUSING PROGRAM

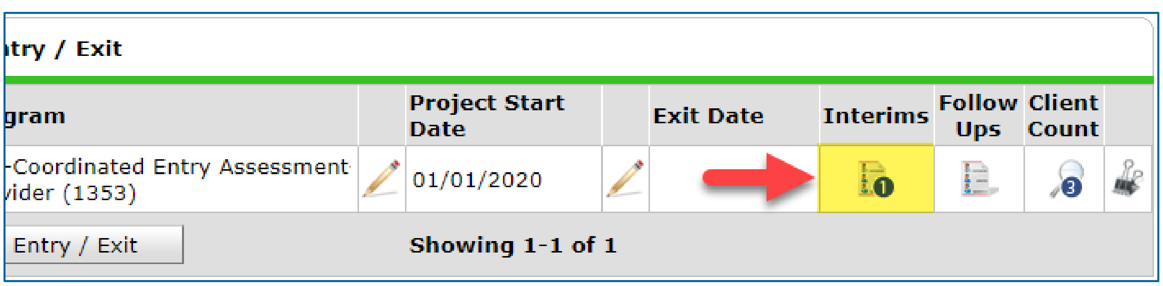
When a client has been matched to a housing program's vacancy, a referral should be created in the Coordinated Entry Event sub-assessment.

In this section, you will...

- Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- Create a housing referral in the Coordinated Entry Event sub-assessment.
- Send a referral notification email to the housing program's contact.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

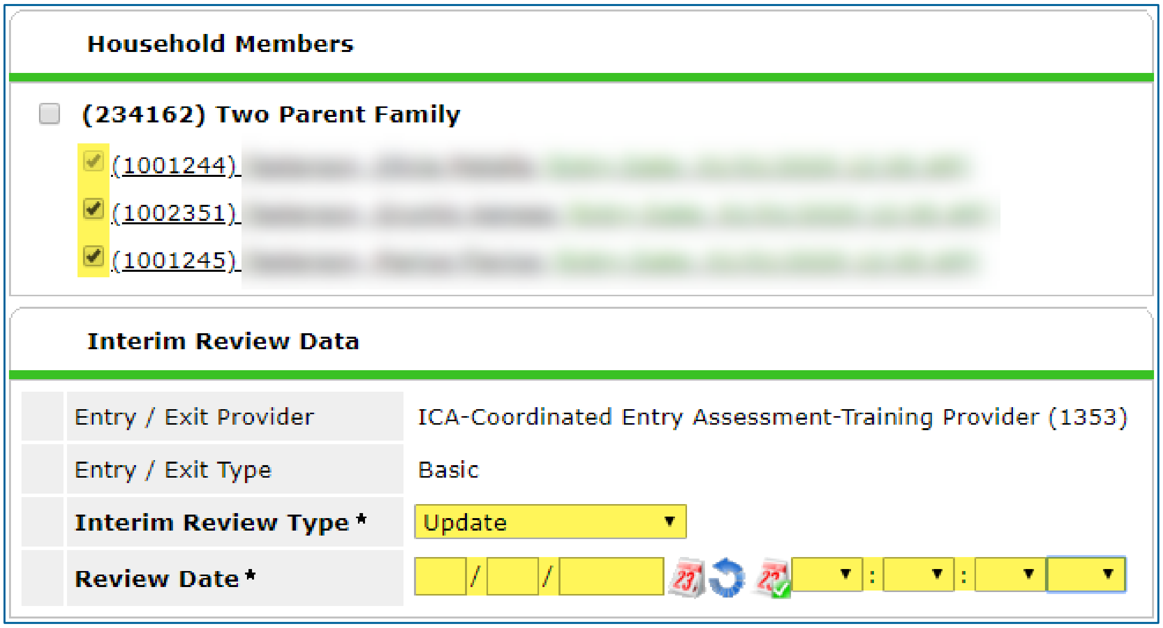
1. Click on **Enter Data As** and select your Priority List provider.
2. Open the client record of the individual or head of household who is being referred to housing. When the Back Date Mode pop-up appears, select **Use Current System Date**.
3. Click on the **Entry/Exit** tab and find the Entry/Exit row for the Coordinated Entry Assessment provider.
4. Select the **Interims** icon, then click on **Add Interim Review** in the Interim Reviews pop-up.



5. 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 who will be referred with the head of household.

b. Interim Review Type: Select **Update**.

c. Review Date: The date the referral is being made.



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

CREATE A HOUSING REFERRAL

1. In the interim assessment, scroll down to the Coordinated Entry Event sub-assessment.
2. Click on the **Add** button and fill out the following fields in the pop-up:

a. Start Date: Enter the date of the client's referral.

b. Date of Event: Same as the Start Date.

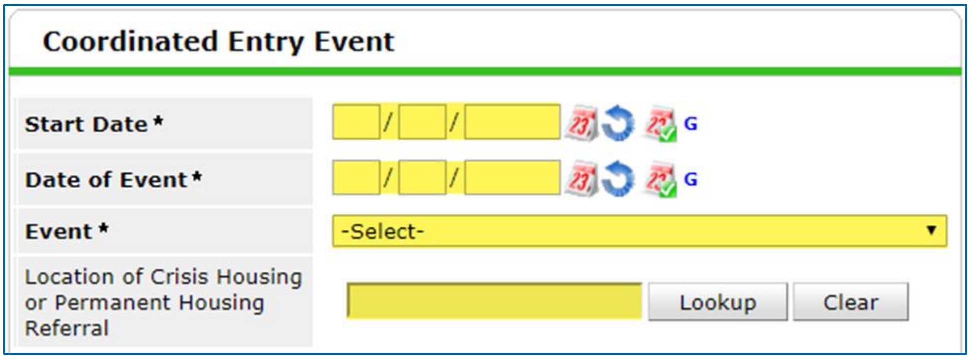
c. Event: Select the most accurate option.

Picklist Option	Project Type Code
Referral to Transitional Housing bed/unit opening	TH
Referral to Joint TH-RRH project/unit/resource opening	TH RRH
Referral to RRH project resource opening	RRH
Referral to PSH project resource opening	PSH D
Referral to Other PH project/unit/resource opening	PH S or PH HO

If you are uncertain which* ***Event* *option to select, check the provider's name to figure out what type of project it represents.*

d. Location of Crisis Housing or Permanent Housing Referral: Click on **Lookup**, then select the housing provider that the client is being referred to.

e. Housing Provider Contact Details: Enter the housing provider contact's information.



Make sure that the* ***Start Date* *and* ***Date of Event*** *are the same date.*

3. Click on **Save** when you are finished filling out the sub-assessment fields.
4. Select **Exit** at the bottom of the assessment to close it.

SEND A REFERRAL NOTIFICATION EMAIL

1. Send an email with the following details to the housing provider's contact person:
    a. Client ID number
    b. Date of Event (The date the referral was made.)
    c. HMIS provider name, including the ID number.
    d. Any other information that you feel the housing provider needs to act upon the referral.

The housing provider should now be able to act upon the referral you created in HMIS. Contact the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.

ACKNOWLEDGE A HOUSING REFERRAL

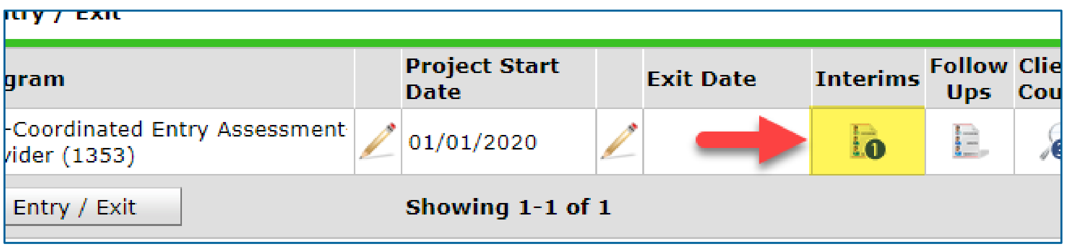
When a housing provider learns that they've been sent a referral, they should acknowledge that referral in HMIS. In the past, this step was called "provisional acceptance."

In this section, you will…

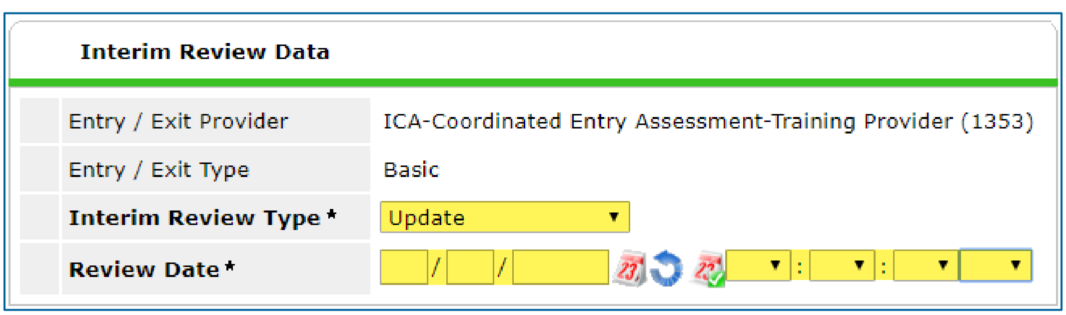
- ☑ Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- ☑ Update the client's referral in the Coordinated Entry Event sub-assessment.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program's provider.
2. Open the client record of the individual or head of household whose referral is being acknowledged. 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 row.
4. Select the **Interims** icon, then click on **Add Interim Review** in the Interim Reviews pop-up.



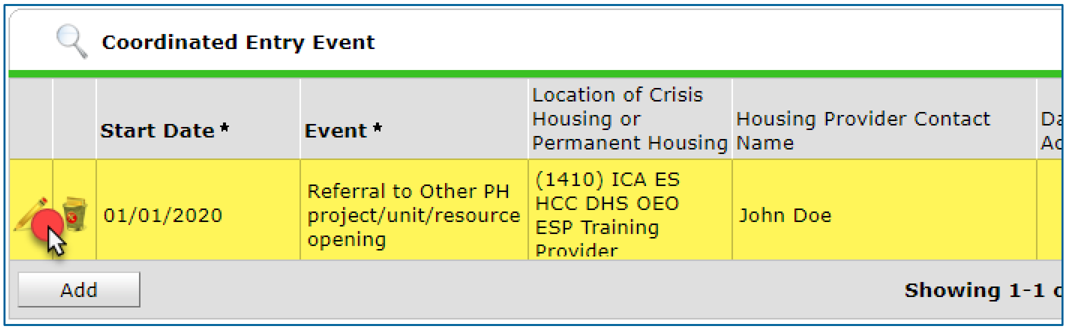
5. Select the following options in the Add Interim Review pop-up:
   a. Household Members: Check the box next to the name of every household member attached to the entry.
   b. Interim Review Type: Select **Update**.
   c. Review Date: The date you learned of the housing referral.



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

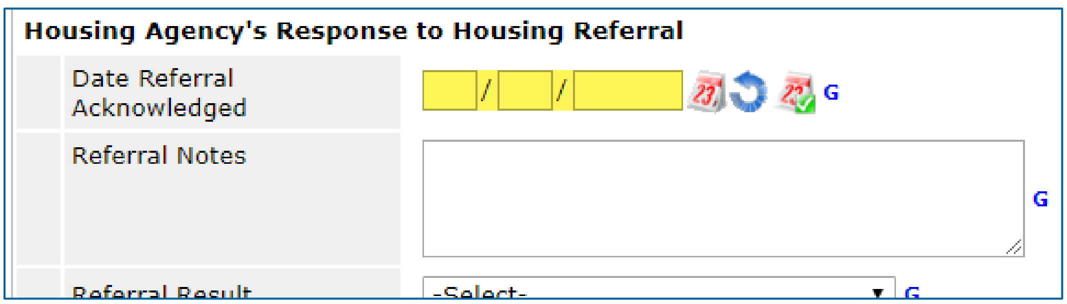
UPDATE A CLIENT'S HOUSING REFERRAL

1. In the interim assessment, scroll down to the Coordinated Entry Event sub-assessment.
    a. Find the row that was created for your housing program and click its **edit pencil**.



Check the **Start Date, **Location**, and **Housing Provider Contact** fields to find your housing program's referral.*

    b. Set the Date Referral Acknowledged as the date you learned of the housing referral.



    c. Click on **Save** when you are finished entering the Date Referral Acknowledged.

2. Review the assessor and client contact information and any other assessment details that you need to reach out to the client.
3. Scroll down to the bottom of the assessment and select **Exit** to close it.

Now that you've acknowledged the referral, the next step is to reach out to the client. Depending on what happens from here, there are two possible outcomes:

- Mark the referral as successful: You make contact with the client and confirm their eligibility and intent to enroll in your housing program.
- Mark the referral as unsuccessful: You are unable to make contact with the client, they are not eligible for your housing program, or they are unable to enroll for another reason.

MARK A REFERRAL AS SUCCESSFUL

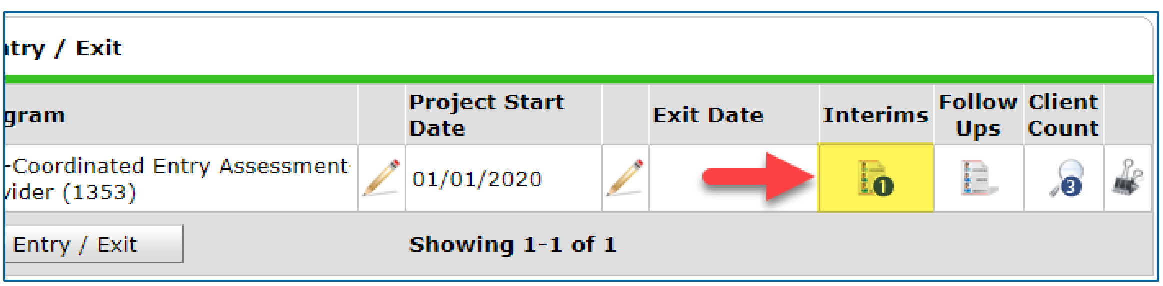
When a person's eligibility has been confirmed and you are prepared to enroll them in your housing program, you should mark their referral as **successful**.

In this section, you will…

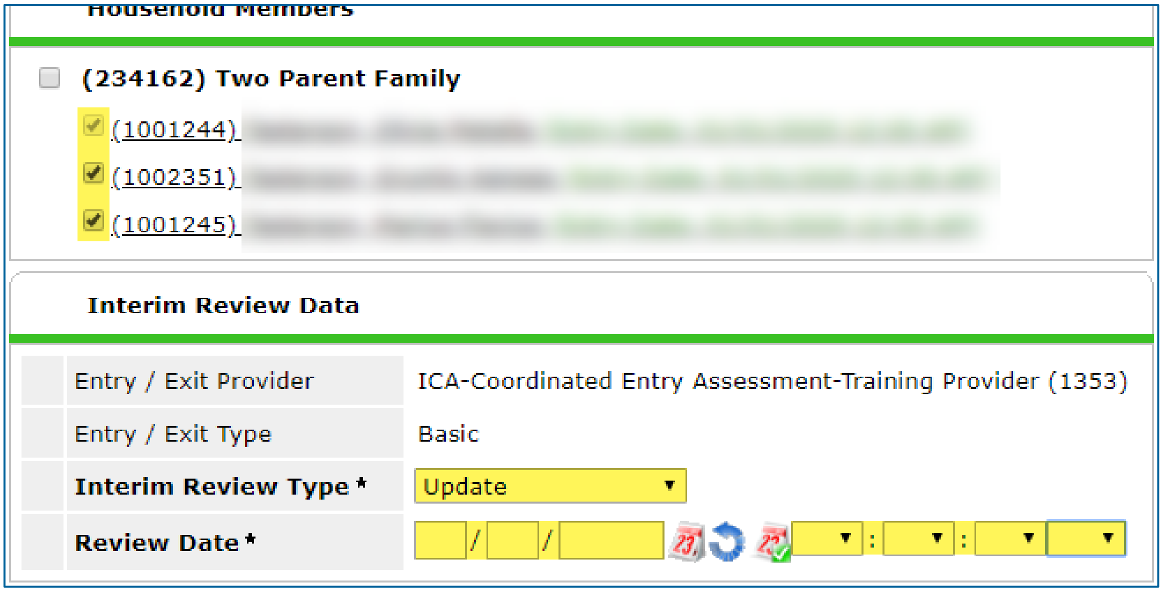
- ✅ Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- ✅ Update the client's referral in the Coordinated Entry Event sub-assessment.
- ✅ Add a new row to the Current Living Situation sub-assessment.
- ✅ Enroll the client in your housing program by creating a new Entry/Exit for your housing provider.
- ✅ Fill out an entry assessment for the client.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program's 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 Entry/Exit row for the Coordinated Entry Assessment provider.
4. Select the **Interims** icon, then click on **Add Interim Review** in the Interim Reviews pop-up.



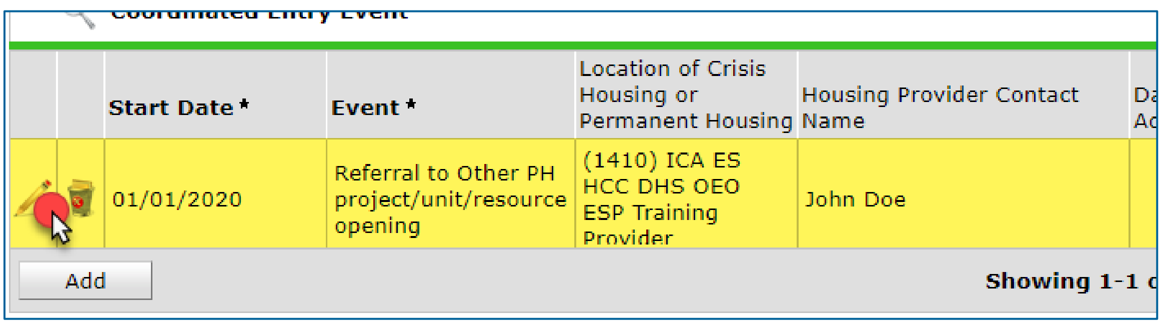
5. Select the following options in the Add Interim Review pop-up:
   a. Household Members: Check the box next to the name of every household member attached to the entry.
   b. Interim Review Type: Select **Update**.
   c. Review Date: The date the referral was successful.



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

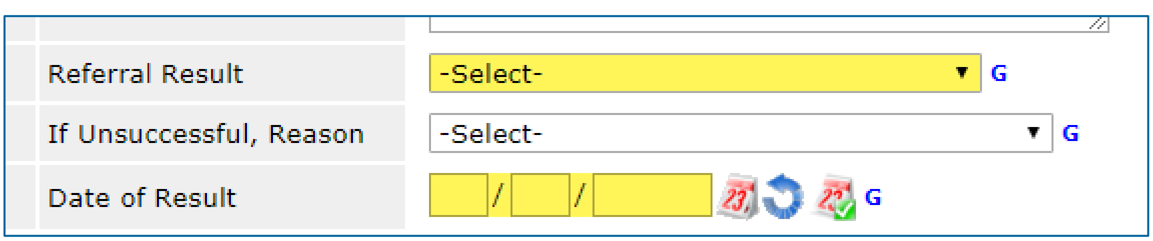
UPDATE A CLIENT'S HOUSING REFERRAL

1. In the interim assessment, scroll down to the Coordinated Entry Event sub-assessment.
    a. Find your referral's row and click on its **edit pencil**.



Check the **Start Date, **Location**, and **Housing Provider Contact** fields to find your housing program's referral.*

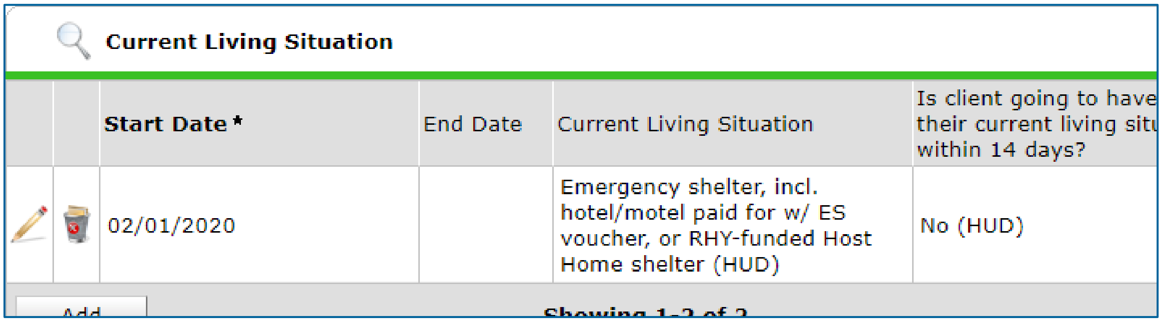
    b. Set the Referral Result to **Successful referral: client accepted**.
    c. Enter the Date of Result as the date the referral was successful.



    d. **Do not** make any other updates to the referral. Click on **Save**.

UPDATE A CLIENT'S CURRENT LIVING SITUATION

1. In the interim assessment, scroll down to the 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. If known, update the client's living situation when their referral is resolved.

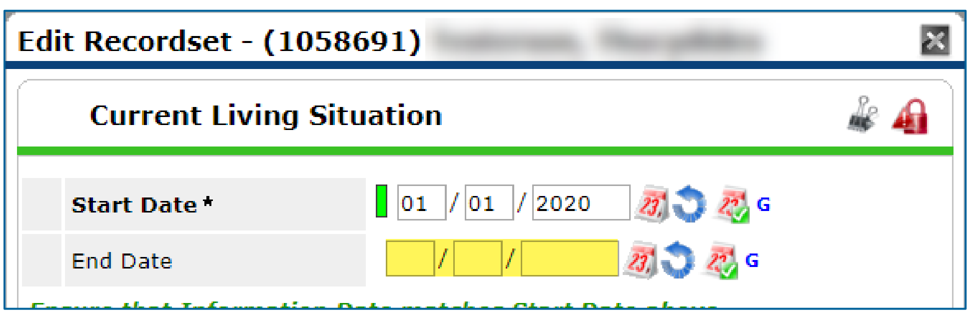


2. Click on the **magnifying glass** to open the sub-assessment pop-up.

3. Check for an active row without an End Date.

    a. If there is one, click on that row's **edit pencil**.

    b. In the Edit Recordset pop-up, enter an End Date that is **<u>one day prior</u>** to the client's assessment date, then select **Save**.



4. Click on **Add** and fill out the following fields:

    a. Start Date: Enter the date of the client's assessment.

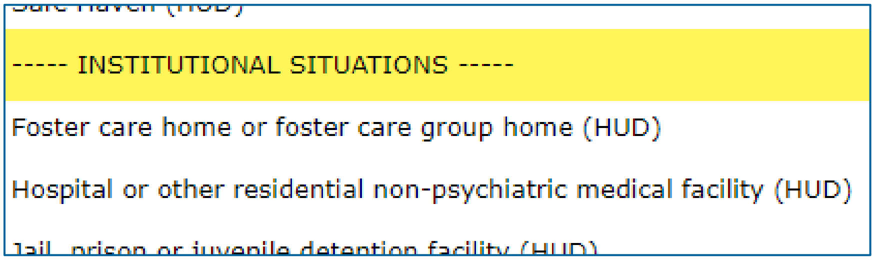
    b. Information Date: Same as the Start Date.

    c. Location Details: **[Optional]** Enter more detail about the client's location.

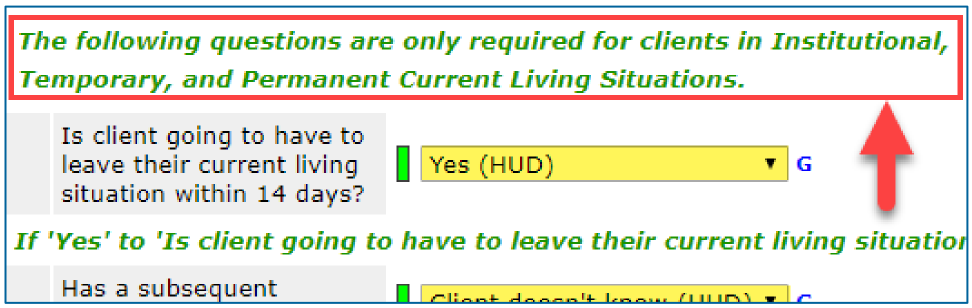
    d. Current Living Situation: Select the most accurate option.

    e. Living Situation verified by: Click on **Lookup**, then select your Coordinated Entry Assessment provider.

f. 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.*



5. Click on **Save** when you are done recording the Current Living Situation.

6. Scroll to the bottom of the interim assessment and select **Exit** to close it.

ENROLL A CLIENT IN A HOUSING PROGRAM

1. Click on **Enter Data As** and select your housing program's provider.

2. Open the client record of the individual or head of household being enrolled in your housing program. When the Back Date Mode pop-up appears, select **Use Current System Date**.

3. Click on the **Entry/Exit** tab, then select **Add Entry/Exit**.

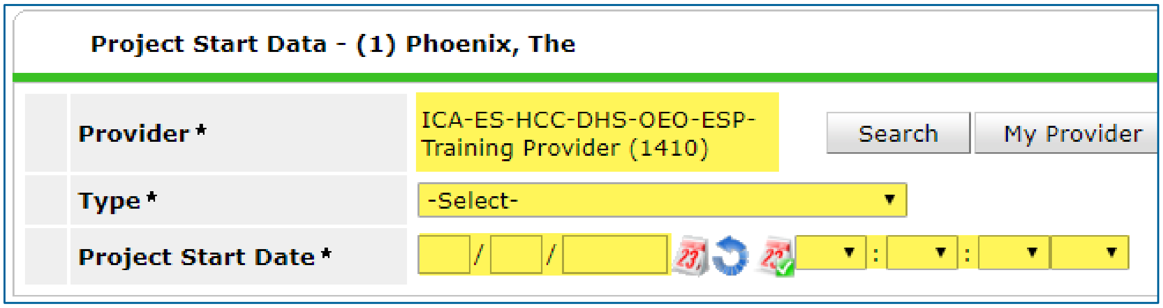
4. Select the following options in the Project Start Data pop-up:

   a. Household Members: Check the box next to the name of every household member who will be attached to the entry.

   b. Provider: Your housing provider.

   c. Type: Select your provider's entry type.

   d. Project Start Date: The date the client was enrolled in your housing program.



5. Click on **Save & Continue** to proceed to your housing program's entry assessment.

FILL OUT AN ENTRY ASSESSMENT

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

HOUSEHOLDS

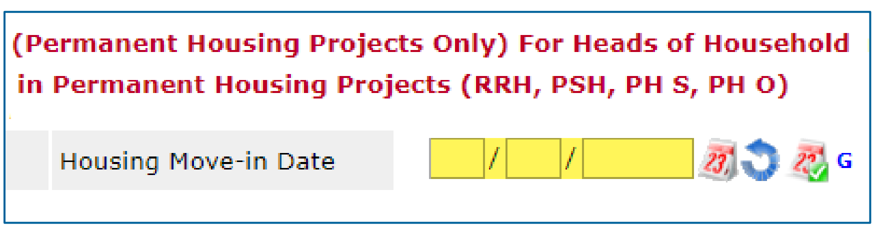
Complete the entry assessment for **all** members of the household.

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.

HOUSING MOVE-IN DATE

If the client moved into housing on the same day that they were enrolled in your housing program, record a Housing Move-In Date. Then, refer to the section Remove a Client from the Priority List for instructions on removing the housed client from the Priority List.



2. Scroll down to the bottom of the assessment and select **Save & Exit** when you are finished entering data.

> If the client has moved into housing and has been removed from the Priority List, data entry is complete. If they **have not** moved into housing yet, it is your responsibility to record an accurate housing outcome at a future date.

MARK A REFERRAL AS UNSUCCESSFUL

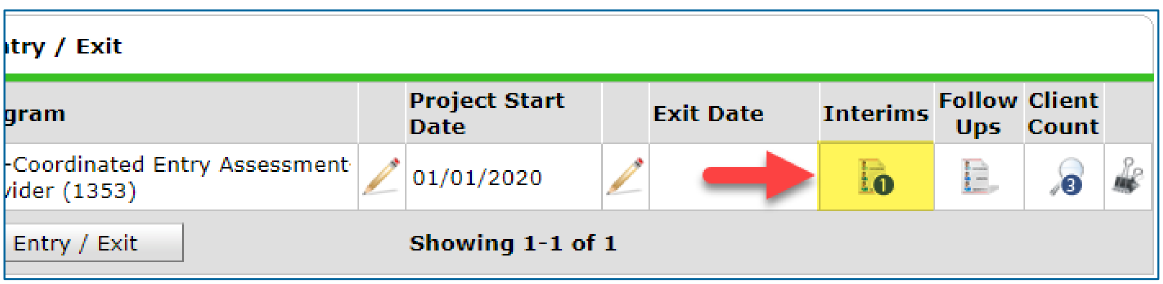
When a housing provider or client rejects a referral, the referral should be marked as "unsuccessful." In many cases, the client should be returned to the Priority List when a referral is unsuccessful. However, if a housing provider knows that the client should not be considered for future housing placements, they should remove the client from the Priority List. See the section Remove a Client from the Priority List for instructions.

In this section, you will...

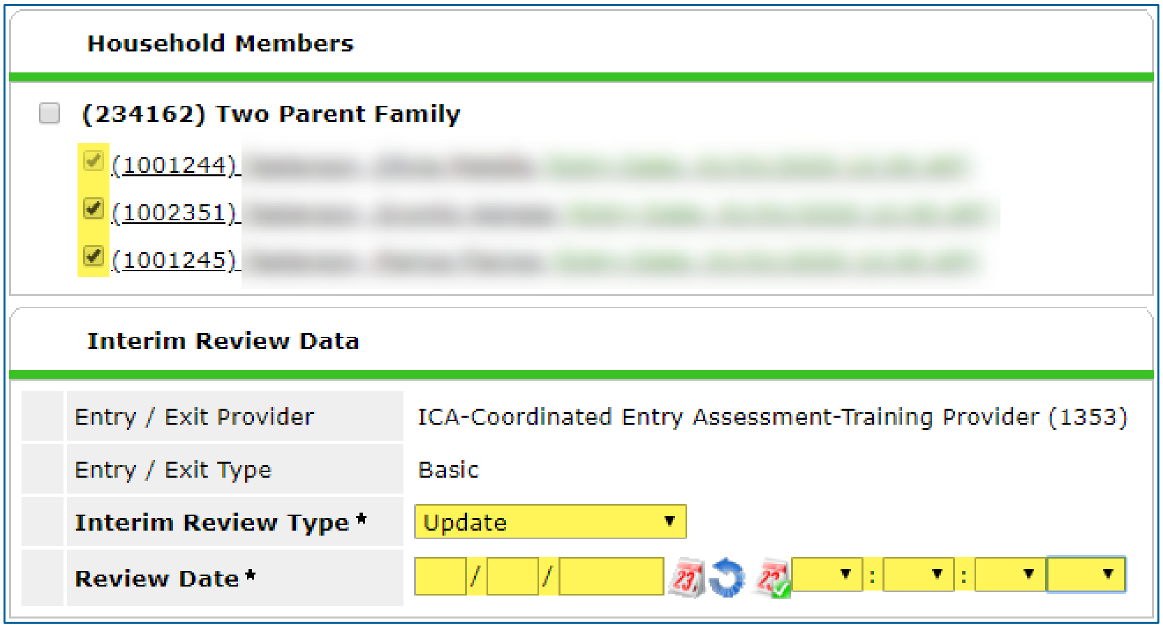
- Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- Update the client's referral in the Coordinated Entry Event sub-assessment.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program's 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 Entry/Exit row for the Coordinated Entry Assessment provider.
4. Select the **Interims** icon, then click on **Add Interim Review** in the Interim Reviews pop-up.



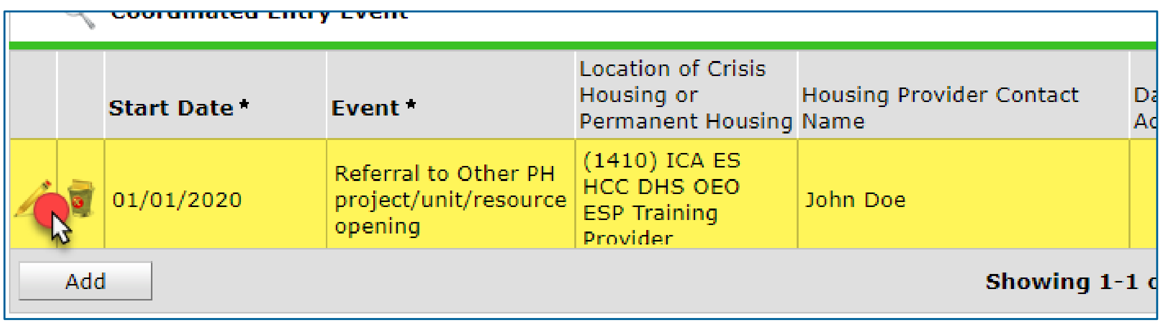
5. Select the following options in the Add Interim Review pop-up:
    a. Household Members: Check the box next to the name of every household member attached to the entry.
    b. Interim Review Type: Select **Update**.
    c. Review Date: The date the new information was reported.



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

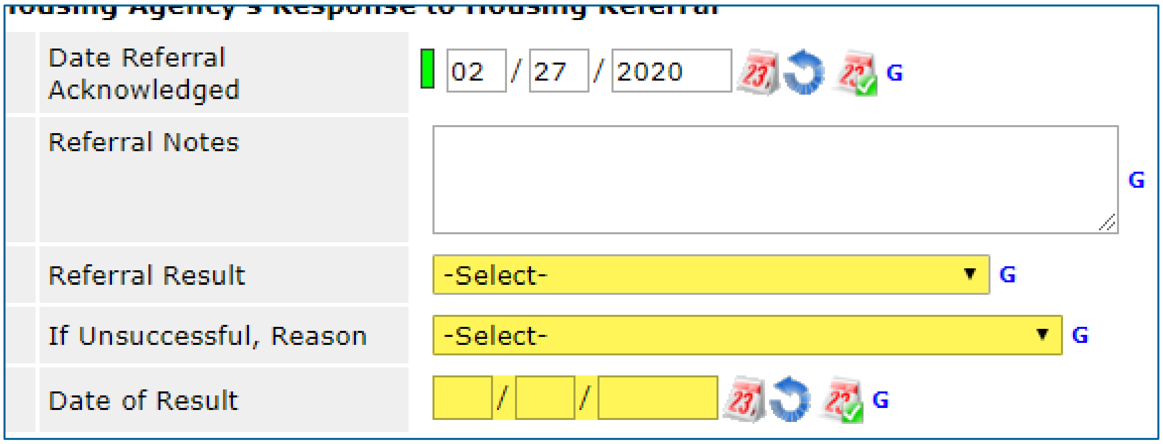
UPDATE A CLIENT'S HOUSING REFERRAL

1. In the interim assessment, scroll down to the Coordinated Entry Event sub-assessment.
   a. Find your referral's row and click on its **edit pencil**.



Check the **Start Date, **Location**, and **Housing Provider Contact** fields to find your housing program's referral.*

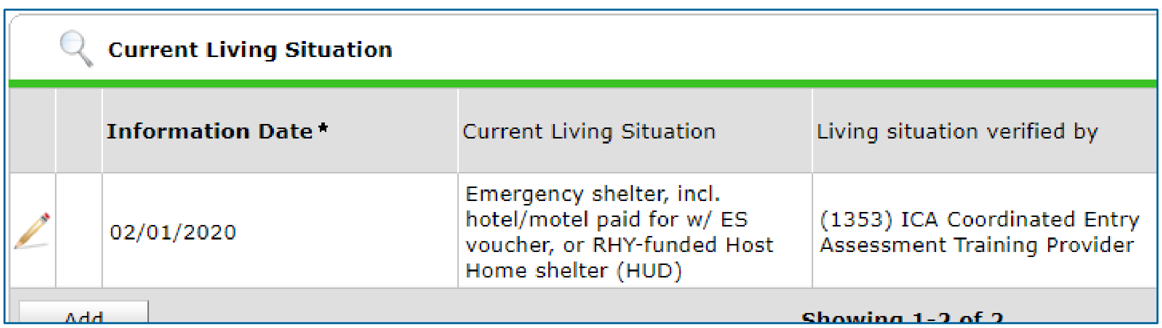
   b. Set the Referral Result to the **Unsuccessful referral** answer that is most accurate.
   c. Select the most accurate answer for the question If Unsuccessful, Reason. Choose a "Declined" answer when returning a client to the Priority List and a "Canceled" answer when removing them from the Priority List.
   d. Enter the Date of Result as the date the referral was unsuccessful.



e. **<u>Do not</u>** make any other updates to the referral. Click on **Save**.

UPDATE A CLIENT'S CURRENT LIVING SITUATION

1. Scroll down to the 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. If known, update the client's living situation when their referral is resolved.

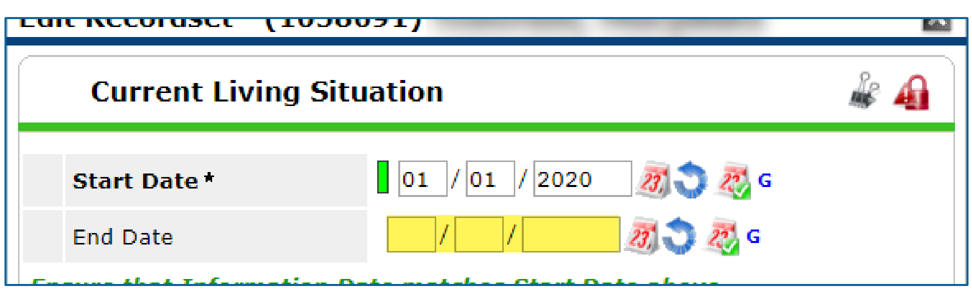


2. Click on the **magnifying glass** to open the sub-assessment pop-up.

3. Check for an active row without an End Date.

   c. If there is one, click on that row's **edit pencil**.

   d. In the Edit Recordset pop-up, enter an End Date that is **<u>one day prior</u>** to the client's assessment date, then select **Save**.



4. Click on **Add** and fill out the following fields:

    a. Start Date: Enter the date of the client's assessment.

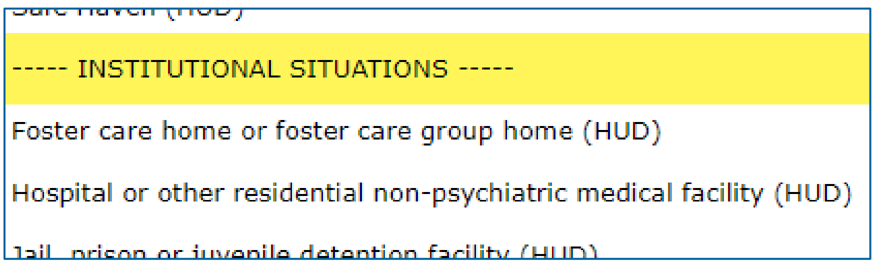
    b. Information Date: Same as the Start Date.

    c. Location Details: **[Optional]** Enter more detail about the client's location.

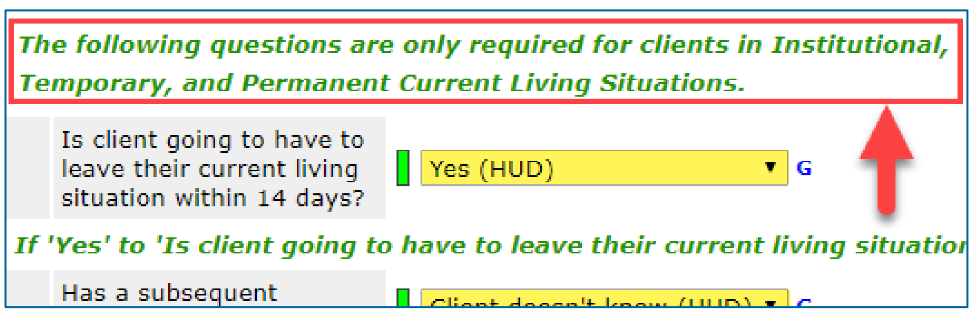
    d. Current Living Situation: Select the most accurate option.

    e. Living Situation verified by: Click on **Lookup**, then select your Coordinated Entry Assessment provider.

    f. 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.*



5. Click on **Save** when you are done recording the Current Living Situation.

6. Scroll to the bottom of the interim assessment and select **Exit** to close it.

At this point, the client will continue to be considered for new housing opportunities. If you know they should be removed from the Priority List, see the section Remove a Client from the Priority List for instructions.

REMOVE A CLIENT FROM THE PRIORITY LIST

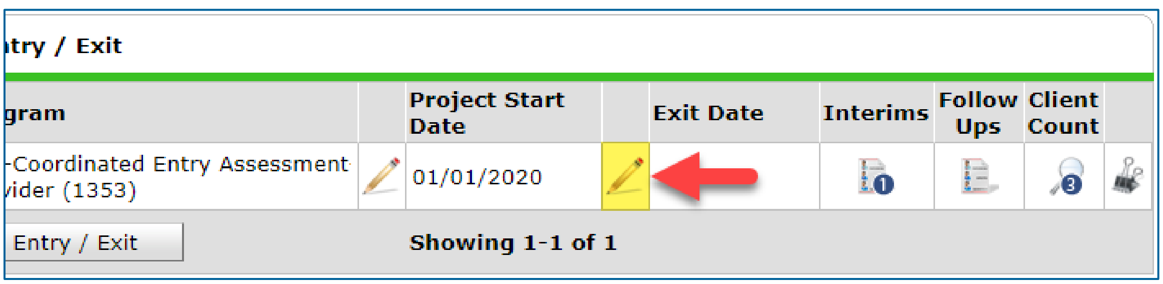
In certain circumstances, a client may be removed from the Priority List because they are no longer considered to be eligible for a placement in homeless-dedicated housing.

In this section, you will…

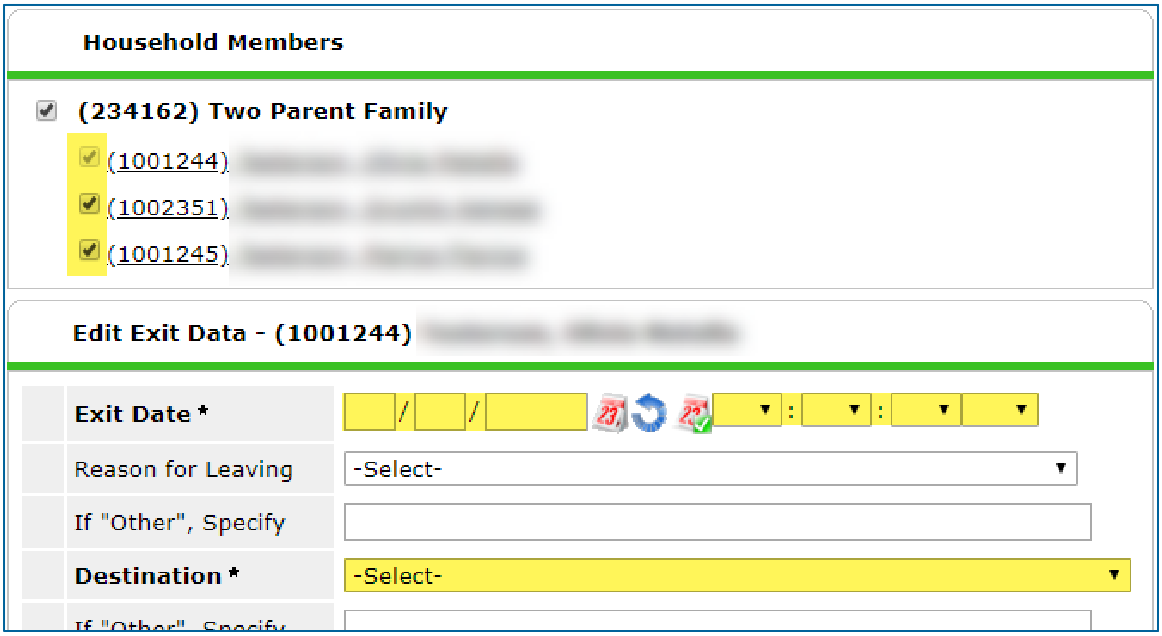
- Add exit data to the Coordinated Entry Assessment Entry/Exit.
- Fill out the exit assessment as completely and accurately as possible.

ADD EXIT DATA

1. Click on **Enter Data As** and select your housing program's 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 Entry/Exit row for the Coordinated Entry Assessment provider.
4. Select the **edit pencil** next to the empty Exit Date field.



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.
   b. Exit Date: The date that the client is being removed from the Priority List.
   c. Destination: Select the most accurate answer.



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

Update the assessment for the head of household **only**.

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.

> At this point, the client should no longer appear on the Priority List. Contact your Priority List Manager or the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.

HOUSING OUTCOME [HOUSING PROVIDERS]

After a referral has been marked as successful and a client has been enrolled in a housing program, it is the housing provider's responsibility to record either that a client has been housed or that they were exited from the program without being housed. **Note: The term "client" will be used through this document to refer to a person experiencing homelessness.**

SHOW THAT A CLIENT HAS BEEN HOUSED

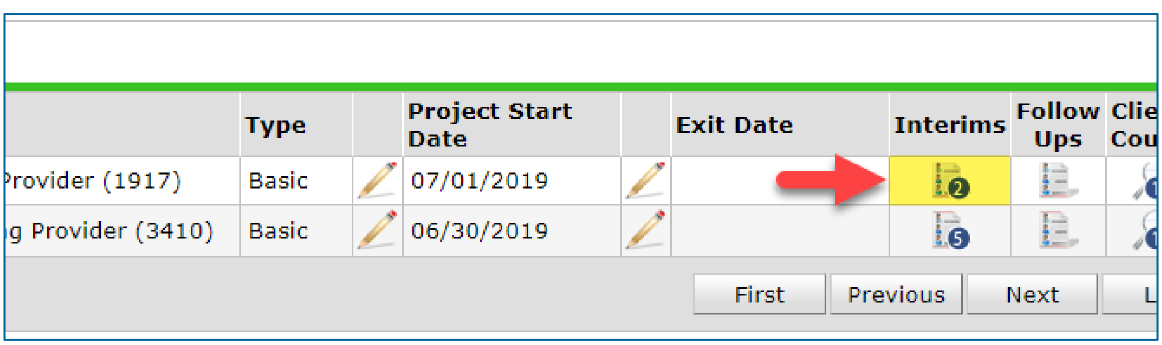
When a client has been housed, it is critical that a Housing Move-In Date be entered and that the client be removed from the Priority List. This will prevent them from being considered for future housing opportunities in place of someone who is still experiencing homelessness.

In this section, you will…

- Add an interim update to the housing program Entry/Exit.
- Record a Housing Move-In Date.
- 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 AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program's 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 Entry/Exit row for your housing program's provider.
4. Select the **Interims** icon, then click on **Add Interim Review** in the Interim Reviews pop-up.

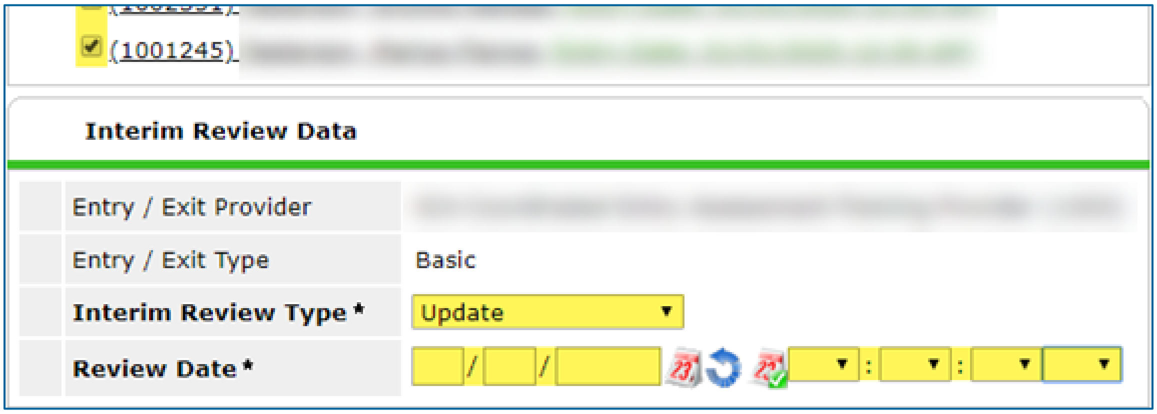


5. Select the following options in the Add Interim Review pop-up:

a. Household Members: Check the box next to the name of every household member attached to the entry.

b. Interim Review Type: Select **Update**.

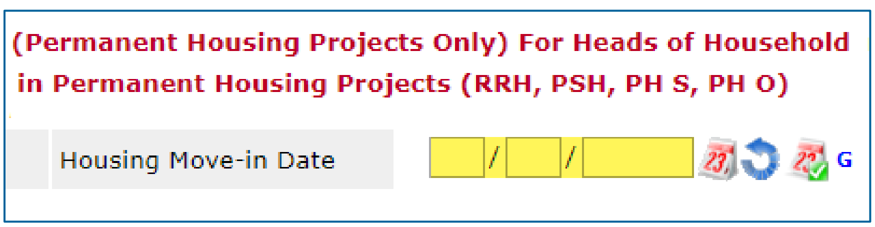
c. Review Date: The date the client moved into housing.



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

RECORD A HOUSING MOVE-IN DATE

1. In the interim assessment, find the Housing Move-In Date field and enter the date that the client moved into housing.

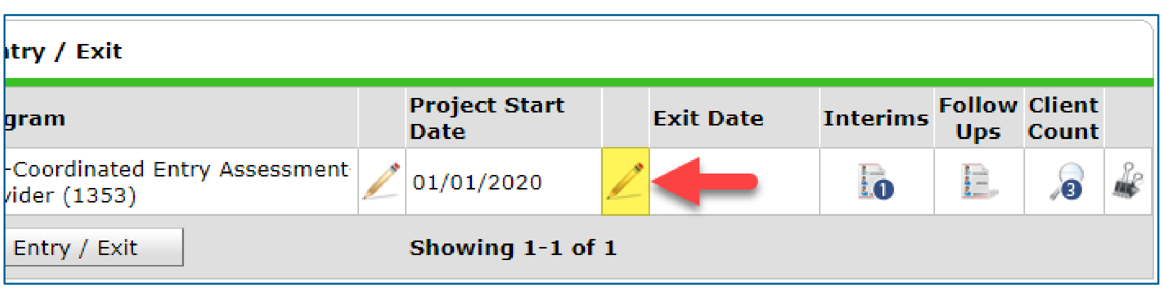


2. Scroll down to the bottom of the assessment and select **Save & Exit** to close it.

ADD EXIT DATA

1. In the Entry/Exit tab, find the row for the Coordinated Entry Assessment provider.

2. Select the **edit pencil** next to the empty Exit Date field.

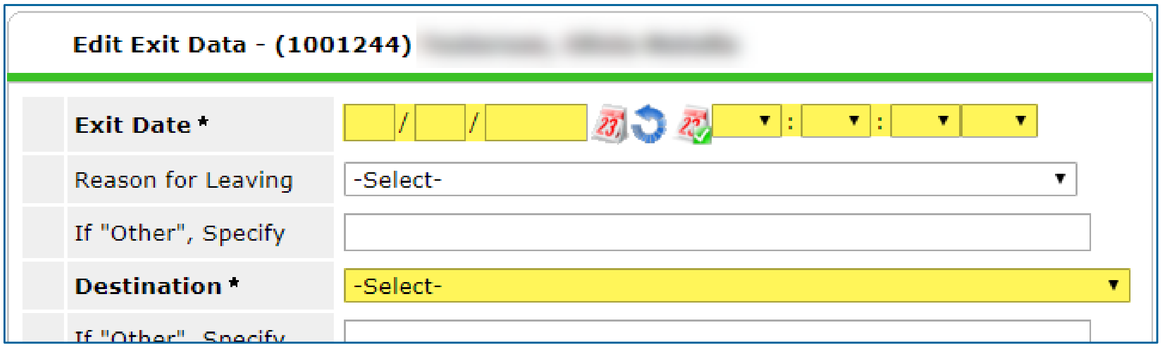


3. Fill out the following fields in the Edit Exit Data pop-up:

   a. Household Members: Check the box next to the name of every household member.

   b. Exit Date: The date that the client is being removed from the Priority List.

   c. Destination: Select the most accurate answer.



4. 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

   Update the assessment for the head of household **only**.

   ### 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 a **Housing Move-In Date** has been entered and the client has been removed from the Priority List, data entry is complete.

SHOW THAT A CLIENT STILL NEEDS HOUSING

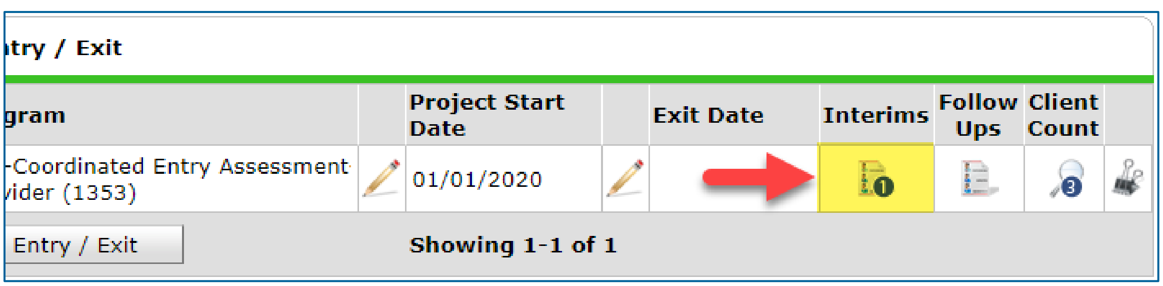
When a client was exited from a program without being housed and wants to continue to participate in Coordinated Entry, follow the directions below to return them to the Priority List.

In this section, you will…

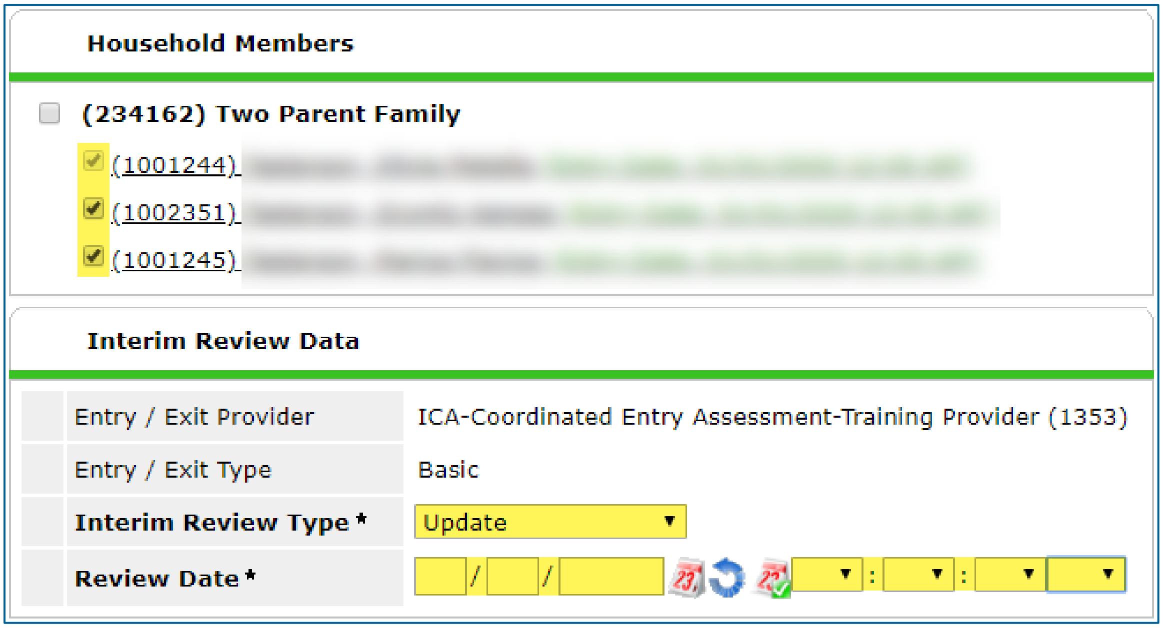
- ✓ Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- ✓ Update the client's referral in the Coordinated Entry Event sub-assessment.
- ✓ Add exit data to the housing program Entry/Exit.
- ✓ Fill out the exit assessment as completely and accurately as possible.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program's 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 Entry/Exit row for the Coordinated Entry Assessment provider.
4. Select the **Interims** icon, then click on **Add Interim Review** in the Interim Reviews pop-up.



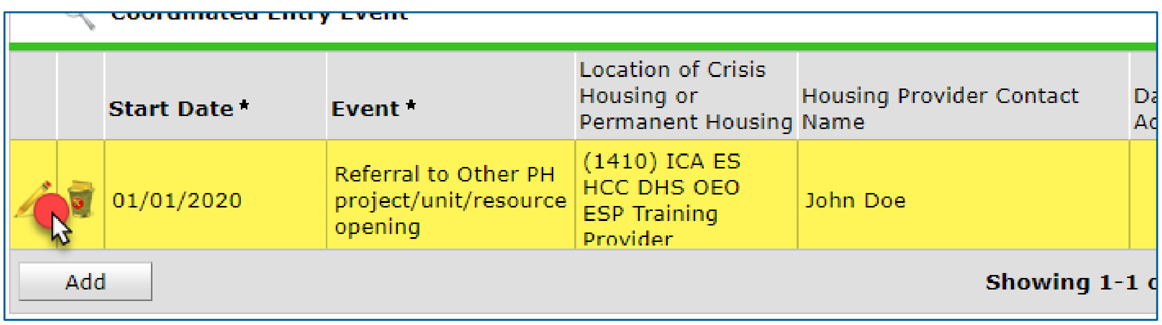
5. Select the following options in the Add Interim Review pop-up:
   a. Household Members: Check the box next to the name of every household member.
   b. Interim Review Type: Select **Update**.
   c. Review Date: The date the client is being returned to the Priority List.



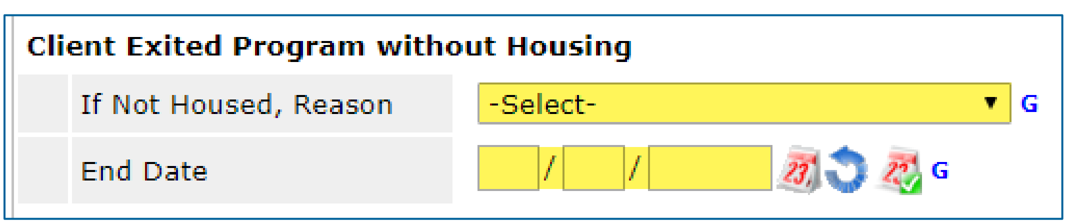
6. Click on **Save & Continue** to proceed to the interim assessment.

UPDATE A CLIENT'S HOUSING REFERRAL

1. In the interim assessment, scroll down to the Coordinated Entry Event sub-assessment.
    a. Find your referral's row and click on the **edit pencil**.



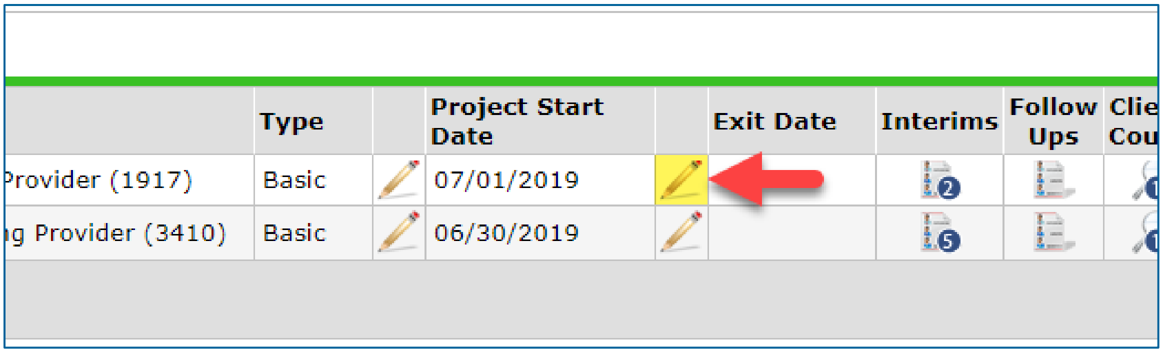
    b. Under the section header Client Exited Program without Housing, make the most accurate selection for the question If Not Housed, Reason.
    c. Add an End Date. This will return the client to the Priority List.



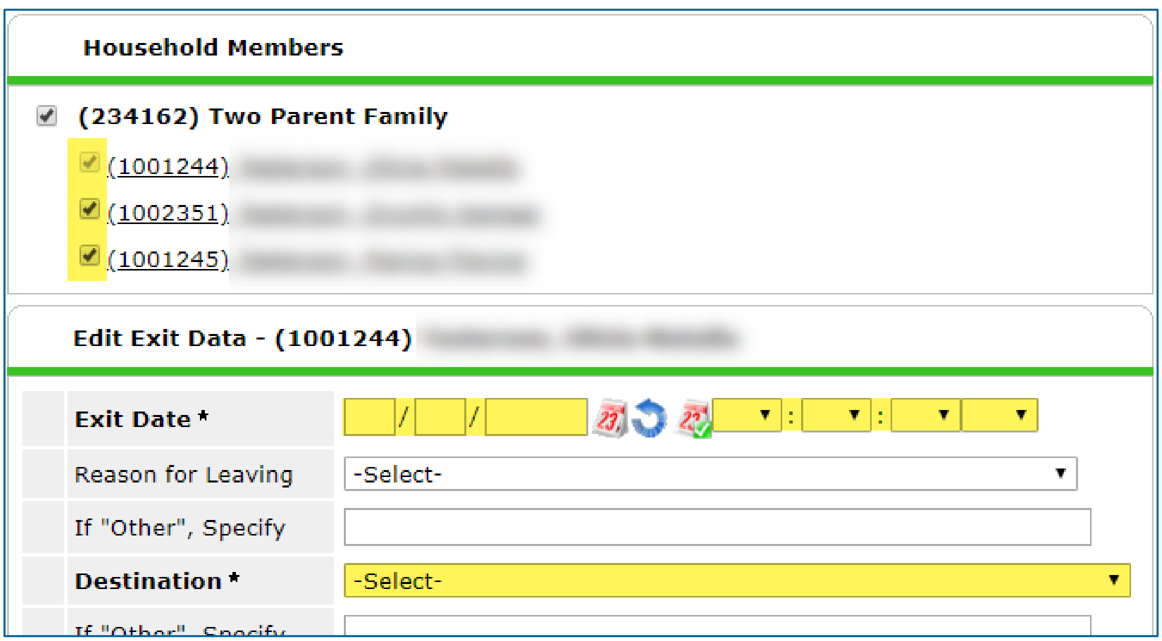
    d. Do not make any other updates to the referral. Click on **Save** to close the referral pop-up.
2. Scroll to the bottom of the interim assessment and select **Exit** to close it.

EXIT A CLIENT FROM A HOUSING PROGRAM

1. In the Entry/Exit tab, find the row created for your housing provider.
2. Select the **edit pencil** next to the empty Exit Date field.



3. 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.
   b. Exit Date: The date that the client exited your program.
   c. Destination: Select the most accurate answer.



4. 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

   Update the assessment for **all** household members.

   ### 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. Contact your Priority List Manager or the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.

REMOVE A CLIENT FROM THE PRIORITY LIST

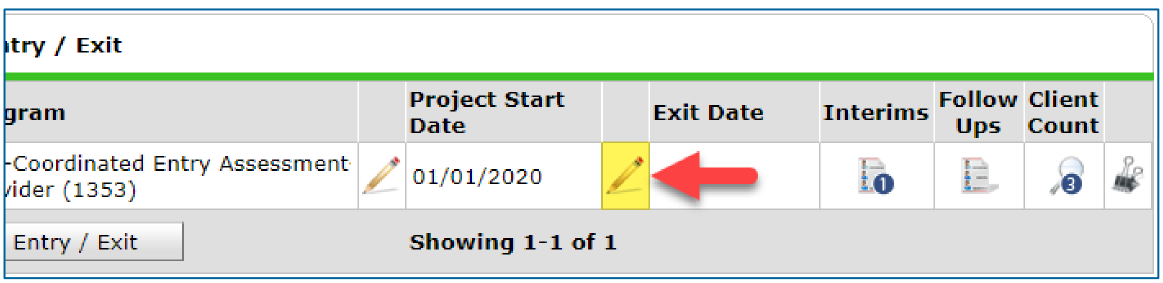
When a client was exited from a program without being housed and **will not** be participating in Coordinated Entry any longer, follow the directions below to remove them from the Priority List.

In this section, you will…

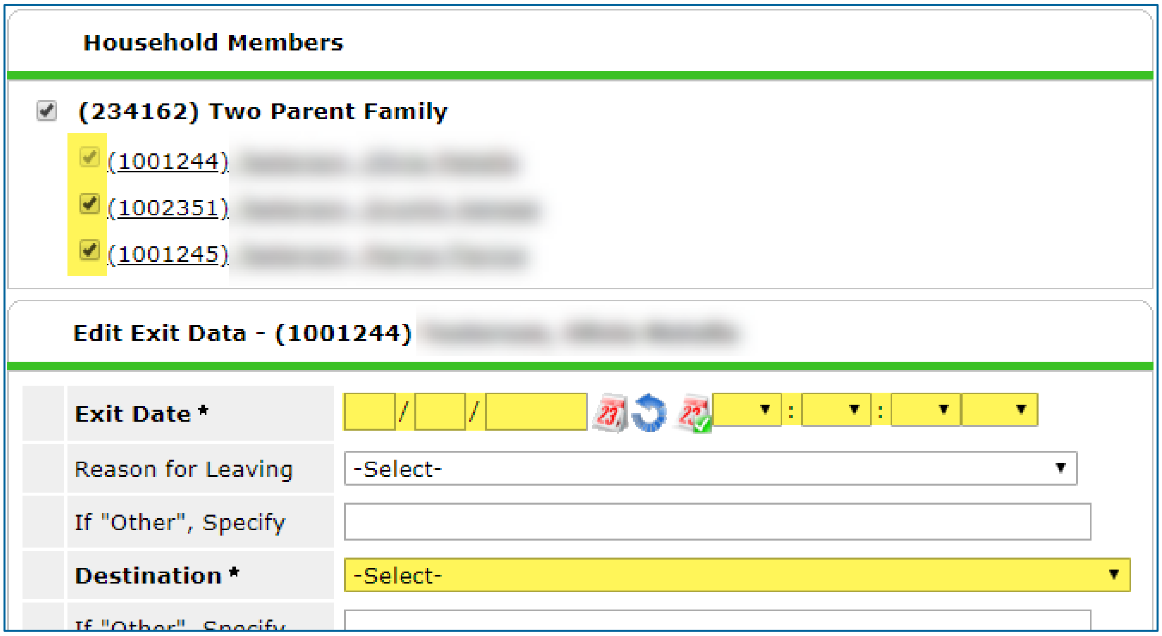
- Add exit data to the Coordinated Entry Assessment Entry/Exit.
- Fill out the exit assessment as completely and accurately as possible.

ADD EXIT DATA

1. Click on **Enter Data As** and select your housing program's 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 Entry/Exit row for the Coordinated Entry Assessment provider.
4. Select the **edit pencil** next to the empty Exit Date field.



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.
   b. Exit Date: The date that the client is being removed from the Priority List.
   c. Destination: Select the most accurate answer.



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

Update the assessment for the head of household **only**.

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.

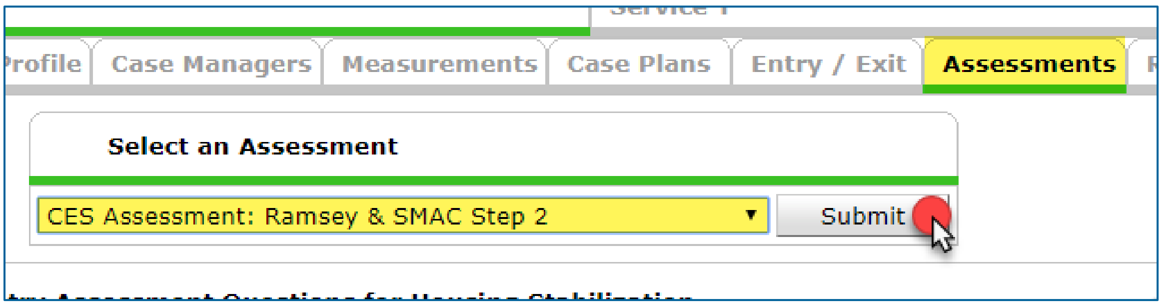
At this point, the client should no longer appear on the Priority List. Contact your Priority List Manager or the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.

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.

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.



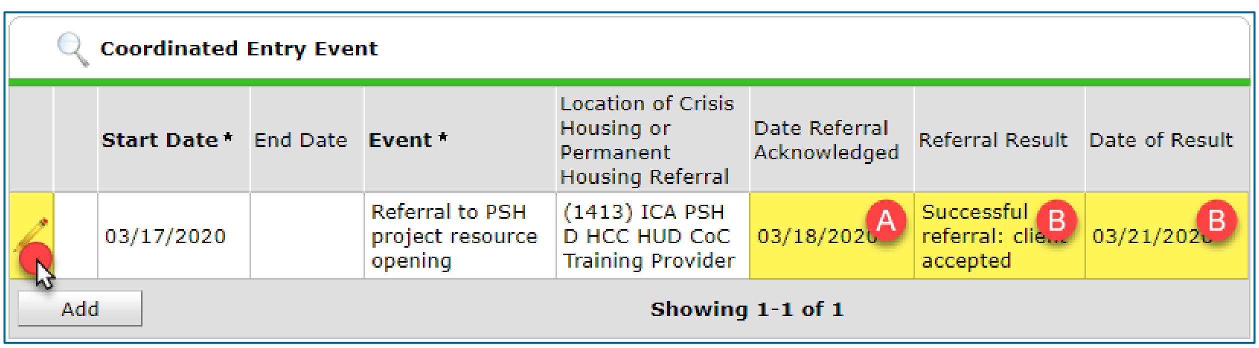
After selecting the correct assessment from the drop-down, click on* ***Submit**.*

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.



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.

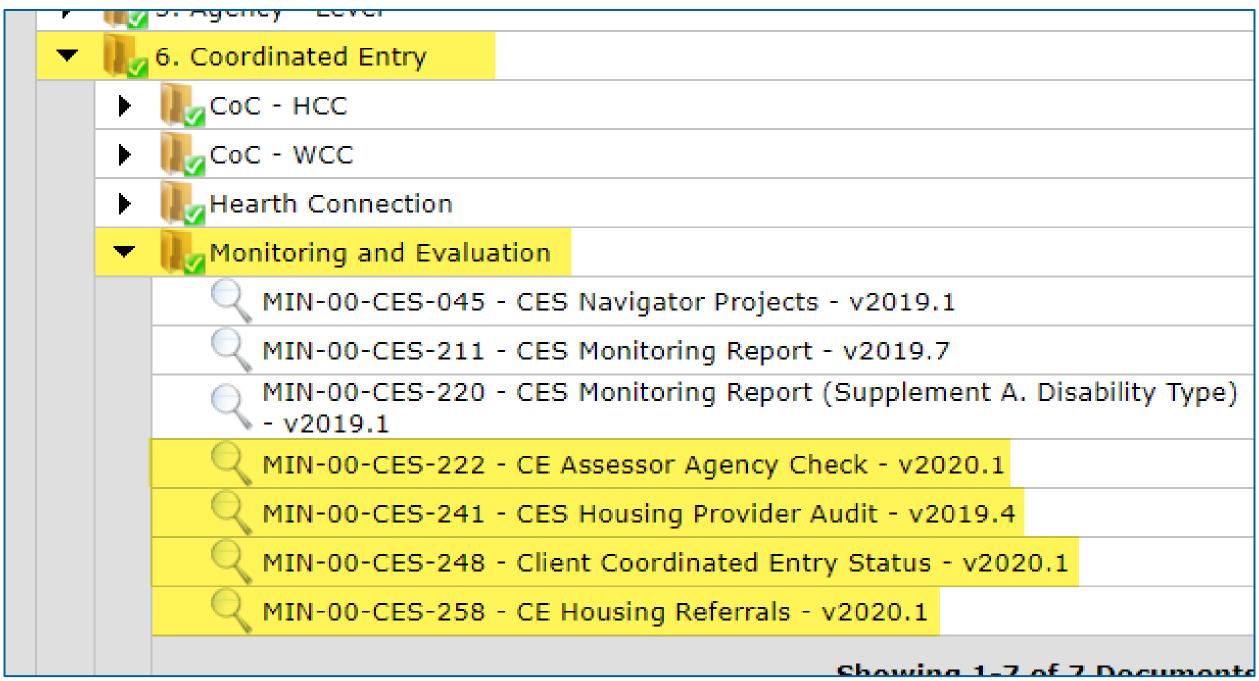
There are four primary Coordinated Entry Reports that users should be aware of:

- 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.*