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 <u>mnhmis@icalliances.org</u>.

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INTRODUCTION TO COORDINATED ENTRY IN HMIS

CORE ELEMENTS

HUD's <u>Coordinated Entry Core Elements</u> 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...

- $rac{\mathscr{O}}{\mathscr{O}}$ Find an existing record or create a new record for the client being assessed.
- Ø Create a new Entry/Exit for the Coordinated Entry Assessment provider.
- Solution 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	
1	178177	Submitte Charters		05/05/1955		
•	1042002			00/11/2015	CHARED	

*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 Mod	e	X			
A 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 Ø ♦ 12 ▼ : 00 ▼ : 00 ▼ AM	•			
	Set New Back Date Use Current System Date	е			

*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		famous incodered		
Name Data	Quality	Full Name Reported		
Alias		SHARED		
Social Secu	rity			
SSN Data Q	uality	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**!



*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!

▼ (226912) Other				
Name		Age	Head of Household	F
(1060073)		61	Yes	\$
(1068769)		57	No	(
Manage Household				
Previous Households				_
Search Existing Households	Start New House	hold	-	

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 <u>Forms & Instructions</u> page of the MN HMIS website or contact the Helpdesk at <u>mnhmis@icalliances.org</u>.

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	Household Members					
(234162) Two Parent Family						
<u> </u>						
<mark> [1002351) [</mark>						
<mark> </mark>						
Project Start Data - (10	001244)					
Provider *	Provider * ICA-Coordinated Entry Assessment-Training Provider (1353) •					
Type *	Basic					
Project Start Date*	/ / 🥂 🖏 📚 🔻 : 🔻 : 🔻 🔻					

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.

	🔍 Coordinated Entry Assessment					
		Date of * Assessment	End Date	Assessor's Name	Assessor's Organization	
	1	03/14/2020		Jane Smith	MN Street Outreach Program	
/	1	01/01/2020	03/13/2020	Jane Smith	MN Street Outreach Program	
	Add 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 <u>one day prior</u> to the client's assessment date, then select **Save**.

Edit Recordset - (1058691)					
Coordinated Entry	Assessment	i 🐇 🦓			
Date of Assessment *	01 / 01 / 2020 🔊 🖏 G				
End Date	/ / 🥂 🕅 🖏 🖏 G				
Assessment Location	Remote	G			
Assessor's Name	Jane Smith	G			
Assessor's Organization	MN Street Outreach Program	G			

*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**. <u>**Do not**</u> choose the other option or the client <u>will not</u> appear on the Priority List.

Assessor's Phone	121.121.1212	6
Assessor's Email	janes@mnsop.org	G
Assessment Type	In Person 🔻 G	
Assessment Level	Housing Needs Assessment V G	
Prioritization Status	Placed on Prioritization List • G	

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

Edit Recordset - (1058691)						
Coordinated Entry	Assessment	<i>&</i> 4				
Date of Assessment *	01 / 01 / 2020 👼 💸 G					
End Date	/ 👷 🕅 🗘 🖉 G					
Assessment Location	Remote	G				
Accoccorio Namo	Jana Smith	G				

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.

	Q	Current Living Situation			
		Start Date *	End Date	Current Living Situation	Is client going to have their current living situ within 14 days?
_	1	02/01/2020		Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)	No (HUD)
	Add 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 <u>one day prior</u> to the client's assessment date, then select **Save**.

Edit Recordset - (1058691)				
Current Living Situation	<i>&</i> 4			
Start Date * 01 / 01 / 2020 🧃 🔿	🧞 G			
End Date / / / 2010	🤯 G			

- 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.

INSTITUTIONAL SITUATIONS
Foster care home or foster care group home (HUD)
Hospital or other residential non-psychiatric medical facility (HUD)
lail prison or invenile detention facility (HUD)

*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.

Th Te	The following questions are only required for clients in Institutional, Temporary, and Permanent Current Living Situations.						
	Is client going to have to leave their current living situation within 14 days?	Yes (HUD) 🔻 G					
If	'Yes' to 'Is client going to	have to leave their current living situation					
	Has a subsequent	Client descrift know (UUD) .					

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.

	Q	VI-SPDAT for	Individuals v2.0)		
		Start Date*	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZ DAILY FU
/	1	12/13/2018	0	0	4	2
/	ŧ	02/28/2017	0	0	0	0
	Add				Showing 1-3 of	3

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

🔍 VI-SPDAT Override/Backlog Entry								
		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 (<u>mnhmis@icalliances.org</u>) 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.

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.

gram		Project Start Date		Exit Date	Interims	Follow Ups	Clie Cou
-Coordinated Entry Assessment vider (1353)	/	01/01/2020		-	lo	E.	æ
Entry / Exit		Showing 1-1 of	F 1				

- 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.

Internit Keview Data	
Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update •
Review Date *	/ / 🧃 🔿 🔊 🔻 : 🔻 : 🔻

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 <u>not</u> necessary to add a new sub-assessment row each time the client's assessment is updated.

	Q	Current Living Situation			
		Start Date *	End Date	Current Living Situation	Is client going to have their current living situ within 14 days?
/	0	02/01/2020		Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)	No (HUD)
	Ada	4		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 <u>one day prior</u> to the date you are updating the client's assessment, then select **Save**.

Edit Recordset - (1058691)					
Current Living Situation	<i>🐇 4</i> 1				
Start Date *	01 / 2020 🧖 🏷 🥂 G				
End Date /	/ 🥂 🥂 🥂 🦪 🖉 G				

- 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.

	Z	VI-SPDAT TOP				
ł		Start Date*	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C S D
/	3	08/15/2019	0	0	0	0
	3	12/13/2018	0	0	4	2
	3	02/28/2017	0	0	0	0

b. Update any inaccurate answers, but <u>do not</u> change the <u>Start Date</u>. When you are finished making updates, click on <u>Calculate</u> 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**.

VI-SPDAT Override/Backlog Entry								
	Date of * Assessment	VI-SPDAT Type	Score	Override or Backlog?	End Date (Complete when new line is entered)			
2	/05/2017	Single	12	Override				
Ad	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 *	/ / 🥂 🕅 🧭 🖓 G			
VI-SPDAT Type	-Select- V G			
Score	-Select- V G			
Override or Backlog?	-Select- V G			
Notos				

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 (<u>mnhmis@icalliances.org</u>) 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.
- \oslash Add an interim update to the Entry/Exit.

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:

▼ (234162) Two Parent Family			
Name	Age	Head of Household	Rela Hea Hou
(1001244)	30	Yes	Self
(1002351)	5	No	Dau
(1001245)	50	No	Sigr
Manage Household			

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.

	Household Members											
	Name	Age	Head (House	of hold	Relationship to Head of Household	-	Join	e	d H	ou	isehold *	
Ð	(1001244)	30	Yes	•	Self •][10	/	13	/	2016	2
Ð	(1023540)		No	•	-Select-		03	/	13	1	2020	2
₽	(1002351)	5	No	T	Daughter •][10	/	13	/	2016	2
Ð	(1001245)	50	No	•	Significant other 🔹][10	/	13	/	2016	2
	Add/Doloto Household Mom	hore										

- 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	Туре		Project Start Date		Exit Date
7	ICA-Coordinated Entry Assessment- Training Provider (1353)	Basic 🔶	/	01/01/2020	/	
				01		

- 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.

	Household Members Associated with this Entry / Exit								
		Name	Head of Household		Project Start Date				
4	k	(1001244)	Yes		01/01/2020				
4	Å¢.	(1002351)	No	_	01/01/2020				
4	🔬 🎪 (1001245) No 🧪 01/01/2020 🥖								
Ir	Include Additional Household Members Show								

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.

Household Members	
To include additional H	ousehold Members, click the box beside each name. Only M ONE Household may be selected at a time.
📄 (234162) Two Parent Fa	amily
<u> √ (1001244)</u>	the final term and the second second
<mark>(1023540)</mark>	Reflect
<u>√ (1002351)</u>	and an an and the second second second second second
<u> √ (1001245)</u>	and the set of the set of the set of the set
Edit Project Start Data -	(1001244)
Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Туре	Basic
Project Start Date*	

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.

ıtry / Exit							
gram	Project Start Date		Exit Date	Interims	Follow Ups	Client Count	
-Coordinated Entry Assessment vider (1353)	 01/01/2020	_	-	lo	E.	8	-
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							
<mark>∉</mark> <u>(1001244)</u>							
<mark> </mark>							
<u> √ (1001245)</u>							
Interim Review Data							
Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)						
Entry / Exit Type	Basic						
Interim Review Type *	Update 🔻						
Review Date *	/ / 23 🞝 🛃 🔻 : 🔻 : 🔻						

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 (<u>mnhmis@icalliances.org</u>) if you require verification.

REMOVE A CLIENT FROM THE PRIORITY LIST

When a person leaves a household or becomes ineligible for placement in homelessdedicated 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 <u>all</u> household members must be removed from the Priority List.

In this section, you will...

- Add exit data to the Coordinated Entry Assessment Entry/Exit.
- \varnothing Fill out the exit assessment as completely and accurately as possible.
- Add an interim update to the Entry/Exit. (If necessary)
- Ø 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.

ıtry / Exit						
gram	Project Start Date		Exit Date	Interims	Follow Ups	Clie Cou
-Coordinated Entry Assessment vider (1353)	01/01/2020	2	+	lo	E	×
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 Member	Household Members							
🖉 (234162) Two Pare	nt Family							
<mark>. (1001244)</mark>								
<u> </u>								
<mark>. € (1001245)</mark>								
Edit Exit Data - (100)1244)	-						
Exit Date *		2) 🔿 23	▼ :	▼ :	• •			
Reason for Leaving	-Select-					•		
If "Other", Specify								
Destination *	-Select-					•		
If "Other" Specify								

*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 <u>only</u>. If another household member is being removed from the Priority List, <u>do not</u> 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.

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gram	Project Start Date		Exit Date	Interims	Follow Ups	Clie Cou
-Coordinated Entry Assessment vider (1353)	01/01/2020	_	-	lo	E.	æ
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								
<mark>∉</mark> <u>(1001244)</u>	<u> </u>							
<mark> </mark>								
<mark>∉</mark> <u>(1001245)</u>								
Interim Review Data								
Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)							
Entry / Exit Type	Basic							
Interim Review Type *	Update •							
Review Date*	/ / Ø 💐 🤯 🔻 : 🔻 : 🔻							

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 (<u>mnhmis@icalliances.org</u>) 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.
- Ø Create a housing referral in the Coordinated Entry Event sub-assessment.
- $rac{1}{rac{1}{2}}$ 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.

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gram	Project Start Date		Exit Date	Interims	Follow Ups	Client Count	
-Coordinated Entry Assessment vider (1353)	 01/01/2020		-	lo	E	8	Å.
Entry / Exit	Showing 1-1 of	1					

- 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.

Household Members							
(234162) Two Parent Family							
<mark>√ (1001244)</mark>							
<mark>. <u>(1002351)</u> ∕</mark>							
<u> </u>							
Interim Review Data							
Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)						
Entry / Exit Type	Basic						
Interim Review Type *	Update •						
Review Date *	/ / 23 😋 🔻 : 🔻 : 🔻						

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	тн
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.

Coordinated Entry Event						
Start Date *	/ / / 🥂 📆 🔿 🔣 G					
Date of Event*	/ / / 🥂 🦉 🏹 G					
Event *	-Select-	•				
Location of Crisis Housing or Permanent Housing Referral	Lookup Clear					

*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 (<u>mnhmis@icalliances.org</u>) 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...

- Ø Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- Ø 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.

gram	Project Start Date		Exit Date	Interims	Follow Ups	Clie Cou
-Coordinated Entry Assessment vider (1353)	 01/01/2020	/	-	lo	E.	X
Entry / Exit	Showing 1-1 of	1				

- 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.

Interim Review Data	
Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update •
Review Date*	/ / 🥂 💐 💐 🔻 : 🔻 : 🔻 🔻

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.

	Coordinated Entry Event							
	Start Date *	Event *	Location of Crisis Housing or Permanent Housing	Housing Provider Contact Name	Da Ac			
	01/01/2020	Referral to Other PH project/unit/resource opening	(1410) ICA ES HCC DHS OEO ESP Training Provider	John Doe				
Add				Showing 1-	1 0			

*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.

Но	using Agency's Response	e to Housing Referral
	Date Referral Acknowledged	/ / 🥂 🥂 🥂 🧟
	Referral Notes	G
	Referral Result	-Select-

- 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:

- <u>Mark the referral as successful</u>: You make contact with the client and confirm their eligibility and intent to enroll in your housing program.
- <u>Mark the referral as unsuccessful</u>: 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...

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

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gram		Project Start Date		Exit Date	Interims	Follow Ups	Client Count	
-Coordinated Entry Assessment vider (1353)		01/01/2020		-	lo		8	Å¢,
Entry / Exit		Showing 1-1 of	1					

- 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.

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(234162) Two Parent Family							
<u>(1001244)</u>							
<mark>€</mark> <u>(1002351)</u>	<u> </u>						
<u> </u>	the first the set of the set of the						
Interim Review Data							
Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)						
Entry / Exit Type	Basic						
Interim Review Type *	Update •						
Review Date*	/ / 23 🗢 23 🔹 • • • • •						

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.

7	Coordinated Entry Event							
	Start Date *	Event *	Location of Crisis Housing or Permanent Housing	Housing Provider Contact Name	Da Ac			
	01/01/2020	Referral to Other PH project/unit/resource opening	(1410) ICA ES HCC DHS OEO ESP Training Provider	John Doe				
Add	Add Showing 1-1 o							

*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.

		//
Referral Result	-Select-	▼ G
If Unsuccessful, Reason	-Select-	▼G
Date of Result	/ / 🧷 💐 G	

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

UPDATE A CLIENT'S CURRENT LIVING SITUATION

 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.

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

- 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 **one day prior** to the client's assessment date, then select **Save**.

Edit Recordset - (105	×	
Current Living S	ituation	i 🐇 👍
Start Date *	01 / 01 / 2020 🧖 💸 G	
End Date	/ / 🥂 🧖 🖏 G	

- 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.

Th Te	The following questions are only required for clients in Institutional, Temporary, and Permanent Current Living Situations.					
	Is client going to have to leave their current living situation within 14 days?	Yes (HUD)	G			
If	Yes' to 'Is client going to	have to leave their current	living	, situatior		
	Has a subsequent	Client descelt know (UUD)	• c			

- 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.

Project Start Data - (1) Phoenix, The					
Provider *	ICA-ES-HCC-DHS-OEO-ESP- Training Provider (1410)	Search My Provider			
Type *	-Select-	T			
Project Start Date*	/ / Ø 💐	▼: ▼: ▼ ▼			

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 <u>all</u> 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 <u>Remove a Client from the Priority List</u> 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 <u>not</u> 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...

- Ø Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- Ø 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.

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gram	Project Start Date		Exit Date	Interims	Follow Ups	Client Count	
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Entry / Exit	Showing 1-1 of	1					

- 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.

Household Members						
🔲 (234162) Two Parent Fa	(234162) Two Parent Family					
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<mark>∉</mark> <u>(1002351)</u>	which we want the same and a state of the second					
<mark>. <u>(1001245)</u> ∕</mark>	and the set of the set of the set of the set					
Interim Review Data						
Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)					
Entry / Exit Type	Basic					
Interim Review Type *	Update 🔻					
Review Date*	/ / Ø 🥸 🥸 🔻 : 🔹 : 🔻 🕇					

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.

	Start Date *	Event *	Location of Crisis Housing or Permanent Housing	Housing Provider Contact Name	Da Ac
	01/01/2020	Referral to Other PH project/unit/resource opening	(1410) ICA ES HCC DHS OEO ESP Training Provider	John Doe	
Add				Showing 1-	1 (

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.

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	-		
Date Referral Acknowledged	02 / 27 / 2020 🧖 💸 G		
Referral Notes			G
Referral Result	-Select-	G	
If Unsuccessful, Reason	-Select-	۲	G
Date of Result	/ / 🧷 🔊 🔊 G		

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

UPDATE A CLIENT'S CURRENT LIVING SITUATION

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.

(🔍 Current Living Situation						
	Information Date*	Current Living Situation	Living situation verified by				
/	02/01/2020	Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)	(1353) ICA Coordinated Entry Assessment Training Provider				
	Add Showing 1-2 of 2						

- 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**.

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Current Living Si	tuation	i 🐇 🦓
Start Date *	01 / 01 / 2020 🧃 💸 G	
End Date	/ / 🧷 🖏 😋 🧟 G	
Francisco that Takana that	Data watch as Chart Data aliana	

- 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.

INSTITUTIONAL SITUATIONS
Foster care home or foster care group home (HUD)
Hospital or other residential non-psychiatric medical facility (HUD)
Jail prison or invenile detention facility (HUD)

*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.

Th Te	The following questions are only required for clients in Institutional, Temporary, and Permanent Current Living Situations.					
	Is client going to have to leave their current living situation within 14 days?	Yes (HUD) 🔻 G				
If	'Yes' to 'Is client going to	o have to leave their current living situation				
	Has a subsequent	Client descrift know (UUD) = C				

- 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 <u>Remove a Client from the</u> <u>Priority List</u> 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...

- Ø Add exit data to the Coordinated Entry Assessment Entry/Exit.
- \varnothing 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.

itry / Exit								
gram		Project Start Date		Exit Date	Interims	Follow Ups	Client Count	
-Coordinated Entry Assessment vider (1353)	/	01/01/2020	2	+	lo	E.	8	K
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.
 - b. Exit Date: The date that the client is being removed from the Priority List.
 - c. Destination: Select the most accurate answer.

Household Members	5				
<u> </u>					
<u> </u>					
<mark>€</mark> (1001245)					
Edit Exit Data - (100	1244)				
Exit Date *	/ / 🥂 📆 😋 🤯 🔻 : 🔻 : 🔻 🔻				
Reason for Leaving	-Select-				
If "Other", Specify					
Destination *	-Select-				
If "Other" Specify					

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 **<u>only</u>**.

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 (<u>mnhmis@icalliances.org</u>) 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.
- Ø Record a Housing Move-In Date.
- Ø Add exit data to the Coordinated Entry Assessment Entry/Exit.
- orall 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.

	Туре	Project Start Date	Exit Date	Interims	Follow Ups	Clie Cou
vrovider (1917)	Basic	07/01/2019		6	E.	8
g Provider (3410)	Basic	06/30/2019		G	E.	8
			First P	revious	Next	

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.

✓ (1001245)							
Interim Review Data							
Entry / Exit Provider	-	-					
Entry / Exit Type	Basic						
Interim Review Type *	Update		•				
Review Date*	/	/	<i>1</i>] 🗘 🎝	•	•	•	•

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.

ıtry / Exit								
gram		Project Start Date		Exit Date	Interims	Follow Ups	Client Count	
-Coordinated Entry Assessment vider (1353)	-	01/01/2020	2	+	lo	E.	8	Å¢.
Entry / Exit		Showing 1-1 of	1					

- 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.

Edit Exit Data - (100	01244)
Exit Date *	/ / 23 🗢 23 🔻 : 🔻 : 🔻
Reason for Leaving	-Select-
If "Other", Specify	
Destination *	-Select-
If "Other" Specify	

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.
- Ø Update the client's referral in the Coordinated Entry Event sub-assessment.
- Ø Add exit data to the housing program Entry/Exit.
- \varnothing 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.
- 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.

itry / Exit							
gram	Project Start Date		Exit Date	Interims	Follow Ups	Client Count	
Coordinated Entry Assessment vider (1353)	 01/01/2020	_	\rightarrow	lo	E	8	Å.
Entry / Exit	Showing 1-1 of	1					

- 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.

Household Members	
🔲 (234162) Two Parent Fa	amily
<u> </u>	the first the second second second second
<mark>∉</mark> <u>(1002351)</u>	which we want the same sector want of the
<mark> </mark>	and the set of the set of the set of the set
Interim Review Data	
Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update 🔻
Review Date*	/ / / 🕅 🖏 🖏 🔻 : 🔹 : 🔹 🔹

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.

	1	Coordinated Entry	Lvent			
		Start Date *	Event *	Location of Crisis Housing or Permanent Housing	Housing Provider Contact Name	Da Ac
4	5	01/01/2020	Referral to Other PH project/unit/resource opening	(1410) ICA ES HCC DHS OEO ESP Training Provider	John Doe	
	Add	1			Showing 1-	10

- 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.

Client Exited Program witho	Client Exited Program without Housing						
If Not Housed, Reason	-Select-	▼ G					
End Date	/ / 🧷 📆 😋 🏹 G						

- d. <u>Do not</u> 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.

·	Туре		Project Start Date		Exit Date	Interims	Follow Ups	Clie Cou
Provider (1917)	Basic	/	07/01/2019	1		10	Ē.	
ıg Provider (3410)	Basic		06/30/2019			6	E.	

- 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.

Household Member	rs				
🖉 (234162) Two Pare	ent Family				
<u> </u>					
<mark>. (1002351)</mark>					
<mark>. € (1001245)</mark>					
Edit Exit Data - (10) Exit Date *	01244)	A S A	▼ :	• : •	T
Reason for Leaving	-Select-				T
If "Other", Specify					
Destination *	-Select-				
The lot handle consider					

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 <u>all</u> 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 (<u>mnhmis@icalliances.org</u>) if you require verification.

REMOVE A CLIENT FROM THE PRIORITY LIST

When a client was exited from a program without being housed and <u>will not</u> 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.
- \varnothing 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.

itry / Exit						
gram	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
-Coordinated Entry Assessment vider (1353)	01/01/2020	∠ 🛖	lo	E.	8	k
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.
 - b. Exit Date: The date that the client is being removed from the Priority List.
 - c. Destination: Select the most accurate answer.

	Household Members	5
1	(234162) Two Parei	nt Family
	<u> </u>	
	<u> </u>	
	<mark> ✓ (1001245) </mark>	
	Edit Exit Data - (100	1244)
	Exit Date *	/ / 20 🎝 🎝 🖓 🔻 : 🔻 : 🔻
	Reason for Leaving	-Select-
	If "Other", Specify	
	Destination *	-Select-
	If "Other" Specify	

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 **<u>only</u>**.

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 (<u>mnhmis@icalliances.org</u>) 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. <u>Do not</u> enter data into the Assessments tab because that information may not appear on the Priority List.

			Service		
Profile	Case Managers	Measurements	Case Plans	Entry / Exi	t <mark>Assessments</mark> F
	Select an Assess	ment			
CES	CES Assessment: Ramsey & SMAC Step 2				t 💦
		f U! CV			

*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.

Coordinated Entry Event									
		Start Date *	End Date	Event *	Location of Crisis Housing or Permanent Housing Referral	Date Referral Acknowledged	Referral Result	Date of Result	
1		03/17/2020		Referral to PSH project resource opening	(1413) ICA PSH D HCC HUD CoC Training Provider	03/18/2020	Successful B referral: clie accepted	03/21/202 B	
Add					Showing	1-1 of 1			

*Click on the **edit pencil** to see more referral details, like housing provider contact information. <u>Do not</u> 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.

W W Stragency Level
- Ilo 6. Coordinated Entry
▶ Щ₂сос - нсс
► U CoC - WCC
Hearth Connection
Monitoring and Evaluation
MIN-00-CES-045 - CES Navigator Projects - v2019.1
MIN-00-CES-211 - CES Monitoring Report - v2019.7
MIN-00-CES-220 - CES Monitoring Report (Supplement A. Disability Type) - v2019.1
MIN-00-CES-222 - CE Assessor Agency Check - v2020.1
MIN-00-CES-241 - CES Housing Provider Audit - v2019.4
MIN-00-CES-248 - Client Coordinated Entry Status - v2020.1
MIN-00-CES-258 - CE Housing Referrals - v2020.1
Showing 1-7 of 7 Document

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