COORDINATED ENTRY
ASSESSOR AGENCY CHECK REPORT PRIMER

The **Coordinated Entry Assessor Agency Check** report is used to check whether clients have an open entry to the priority list and to identify information that needs to be updated so that Priority List Managers can make better informed referrals to housing.

Contents **|** Introduction **|** Report Overview **|** Making Data Corrections

INTRODUCTION

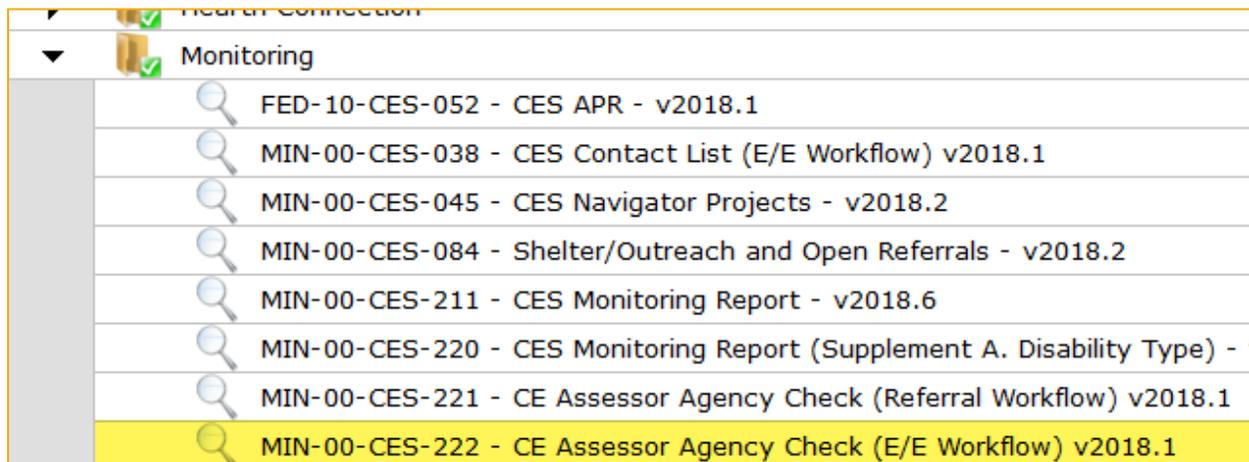Learn about the intended purpose of this report and how to access it in HMIS.

REPORT PURPOSE

Coordinated entry access points can run this report to check for data quality issues and to confirm whether a client has been removed from the priority list in the selected date range. The report will only look at clients referred to the priority list by the provider(s) designated at runtime.

REPORT LOCATION

To find this report, open the Advanced Reporting Tool (ART) in ServicePoint and expand the following folders in order: **Public Folder** => **SSA Report Gallery** => **Coordinated Entry** => **Monitoring**.

The report's full name is **MIN-00-CES-222 – CE Assessor Agency Check (E/E Workflow)**

REPORT PROMPTS

- **Enter CES Assessment Provider(s)**: Only clients added to the priority list by the provider(s) specified here will appear on the report.
- **EDA Provider**: Default Provider (Do not change this!)
- **Enter Start Date**: The first date of the reporting period at 12:00:00 AM. Clients with open entries to the priority list as of this date will appear in the report.
- **Enter End Date (PLUS 1 Day)**: The last day of the reporting period PLUS 1 day at 12:00:00 AM. Clients with entries to the priority list that begin after this date will not appear in the report.
- **Enter effective date**: Same as the End Date (PLUS 1 Day) value.

REPORT OVERVIEW

This section briefly describes what information can be found on each of the report's tabs.

SUMMARY

The **Summary** tab displays the prompts selected by the user that ran the report. Double check these prompts if there appears to be additional or missing information in the report. Beneath the prompts are a few helpful data points, like the number of individuals added to the priority list by the specified provider(s) within the reporting period.

INDIVIDUALS ON PL

The **Individuals on PL** tab displays client-level information, including the data used for prioritization in the client's CoC, universal data elements, and the "Living Situation" answers used to determine whether an individual is chronically homeless. Review this information to see whether it is accurate and if there are any data entry errors. See the **Individuals on PL – Error Key** tab for help understanding flagged errors.

The **Assessment Date** and **Assessor Name** columns on this tab can be used to determine who assessed a client and when. Microsoft Excel's Filter function can remove clients that your agency did not assess.

INDIVIDUALS ON PL – ERROR KEY

The **Individuals on PL – Error Key** tab explains how to interpret error flags on the **Individuals on PL** tab. The key displays each error's name, formatting, and a short explanation for why it appears.

Error Key		
Column Name	Error Message	Error Description
Client ID	Red Text	Client has an ID number < 7 digits. All individuals with transactions in the system on or after 10/1/2016 must have a new client record created in HMIS.
Date Added to Priority List	Multiple Referrals	Client has multiple open referrals to the priority list. Please contact the MN Helpdesk to delete duplicated referrals.
HUD Homeless? (Category 1)	Missing	Null values in any of the following fields: Residence Prior to Project Entry; Length of Stay in Previous Place; On the night before did you stay on the streets, ES or SH

ADDITIONAL ERRORS

The **Additional Errors** tab highlights errors that were not captured on the **Individuals on PL** tab. Potential errors include the following:

- **Household Errors**:
  - Entry/Exits have no head of household attached to them.
  - Entry/Exits have additional household members attached to them that should be removed.
  - A "Child-Only" household is missing its head of household.
- **Multiple EEs**: Clients with multiple entries for the priority list provider.
- **Review Override Date**: Check the client's override VI-SPDAT score to determine whether it should be used for coordinated entry. If the score is no longer relevant, it should be given an *End Date*.

EXITED CLIENTS

The **Exited Clients** tab displays a list of all individuals who had an Entry/Exit to the priority list closed in the report period. Clients that appear in this list will also appear on the **Individuals on PL** tab, since their entry was open as of the report's start date. Helpful information found on this tab includes *Destination*, the most recent Entry/Exit provider, and *Days from Added to List to Housed*.

MAKING DATA CORRECTIONS

In addition to checking whether clients have an open entry to the priority list, this report can be used identify information that needs to be updated so that Priority List Managers can make better informed referrals to housing.

Review the **Individuals on PL** tab and **Additional Errors** tab for missing or incorrect data. The workflow documentation on the Coordinated Entry page of the MN HMIS website, hmismn.org, can be a helpful resource when updates need to be made. Questions about making corrections to a client's data can also be directed to the Minnesota HMIS helpdesk at mnhmis@icalliances.org.