

## Quick Reference Guide for MN HSG-FHPAP Outreach

<b>Client Record</b>	<ol style="list-style-type: none"> <li>1. Click on “Enter Data As” (EDA) and select the correct provider to enter EDA mode. *For clients who generally reside in the streets or places not meant for human habitation, enter them into your Street Outreach (SO) provider; for clients who generally reside in a place meant for human habitation, including emergency shelters, transitional housing, etc, enter them into your Supportive Services (SSO) provider</li> <li>2. In Client Point, fill out 3 different combinations in the NAME (first, middle, last) data field for primary client to search for an existing record. Select primary client’s name in the search results or confirm no records match.</li> <li>3. If no records match, complete the rest of the prompts as fully as possible. If client has signed the ROI to be included in Statewide Data Sharing, type SHARED in the Alias field.</li> <li>4. Click “Add New Client with This Information.”</li> <li>5. Backdate to client’s entry date (in pop-up or by clicking on “Back Date”).</li> <li>6. Click on the pencil to complete the Demographics as completely as possible under the Client Profile tab.</li> <li>7. Create a household in the Household tab only if primary client is being served with other household members.</li> </ol>
<b>Entry</b>	<p><b>An ENTRY is created at the Date of First Contact, and all information that was true as of that date, regardless of when it is collected, is input here.</b></p> <ol style="list-style-type: none"> <li>1. Confirm that you are in EDA mode to the correct provider and open to the primary client’s record.</li> <li>2. Confirm that you are backdated to the date of client’s entry</li> <li>3. Click Entry/Exit and Add Entry/Exit, then select BASIC for data type (If entering a household, first click on “Add Household Data” to complete the <i>Household Data Sharing Assessment</i> and answer data elements common among all clients prior to completing each individual entry assessment.)</li> <li>4. Record if and when the client becomes Engaged*. Only 1 Date of Engagement should be recorded for each client, which may or may not be the same as the Date of First Contact/Date of Entry</li> <li>5. Fill in the other answer fields throughout the Entry Assessment, including the ROI for those who signed.</li> <li>6. Save</li> </ol> <p>*Date of Engagement is the point at which an interactive client relationship results in a deliberate client assessment or beginning of a case plan. Engagement is a one-time event and may occur on or after the project Entry Date. All Universal Data Elements and Provider Specific Data Elements are required to be collected by the Date of Engagement, and agencies are not expected to obtain all of the required data elements prior to Engagement.</p>
<b>Interim Update</b>	<p><b>An INTERIM Update is created to record data elements for the client that have changed since Entry or the last Interim Update, and to update the status of Engagement if it did not occur at Entry/First Contact.</b> (However, data obtained for the Client Record- Name, SSN, Veteran Status- should instead be entered by clicking on the pencil next to the Client Record under the Client Profile tab. Likewise, any data that was true as of Entry/First Contact should be recorded by going back and reopening the existing Entry transaction, regardless of when that data was collected.)</p> <ol style="list-style-type: none"> <li>1. Confirm that you are in EDA mode to the correct provider and open to the primary client’s record</li> <li>2. Click on Entry/Exit + Interims + Add Interim Review, then Update for review type, and enter date of review.</li> <li>3. Fill in the answer fields with as much data as was given by client at this date of contact</li> <li>4. Save</li> </ol>

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**Services**

1. Confirm that you are in EDA mode to the correct provider and backdate to the date of the Service
2. In the Service Transactions tab, click Add Service or Add Multiple Services
3. Include any applicable household members included in the service by checking the boxes next to their names

\*Only services with a financial value (rent, deposit, etc) are required to be recorded here; for “Funding Source,” select FHPAP

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**Exits**

1. Confirm you are in EDA mode to the correct provider and backdate to the date of Exit
2. Click on pencil next to Exit in Entry/Exit
3. Select Destination from drop-down menu, then Save & Continue
4. Fill out the Exit Assessment that appears, updating where appropriate
5. Click Save & Exit

\*It is recommended that clients who have been out of contact for more than 60 days be Exited as well. They may have a new Entry created for them if contact is reestablished.

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