HENNEPIN COUNTY CES WORKFLOW:

HMIS DATA ENTRY INSTRUCTIONS

CONTENTS

Please think before you print. Not every page of this guide is relevant to you. Refer to table of contents above for assistance.

ASSESSOR DATA ENTRY STEPS ("STEP 2")

LOCATE OR CREATE A CLIENT RECORD IN HMIS

In order for a client to be entered into HMIS for Coordinated Entry, they must complete a release of information and consent to share their information statewide. The HMIS ROI can be found on the Administrative Documents page of the HMIS MN website. If a "closed" client record is placed onto the Priority List, this client will not appear on the Priority List Report and will not be contacted with housing opportunities. If a client does not agree to share their data statewide, contact your Priority List Manager to understand how your CoC is tracking the Priority List outside of HMIS.

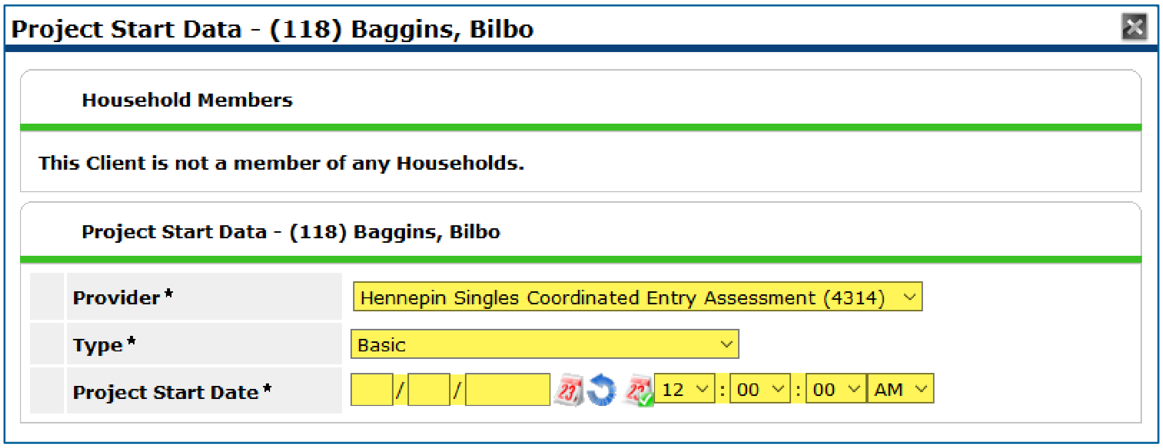
1. Click on **Enter Data As** and select your **Coordinated Entry Assessment** provider (**4314** or **4315**).
2. In **ClientPoint**, fill out the client search prompts to see whether the client already has an HMIS record.
    a. If a client record already exists, make sure this is a shared client record (The **Alias** field should say **SHARED**).
3. If there are no matching results, create a new client record. Fill in as many of the search prompts as you can before clicking on **Add New Client With This Information**. Remember to add **SHARED** to the **Alias** field as you are creating an "open" client record.
4. If you are not doing live or same day data entry, backdate to date of assessment (when the **Back Date Mode** pop-up appears or by clicking on **Back Date** underneath **Enter Data As**).
5. If the client is planning to live with other household members, check the **Households** tab to see whether they are already in a household together.
    a. If a household does not already exist, you will want to create a new household in the **Households** tab. For detailed instructions on how to create households, please refer to the Households How-to Guide on the Forms and Instructions page of the HMIS MN website.
    b. If a household does already exist but has changed since it was first entered, please carefully follow the instructions starting on page 9 of the Households How-to Guide when making any edits to an existing household!

PLACE A CLIENT ONTO THE PRIORITY LIST

If the participant is being assessed for a second time, read the section Update Data While Client is on the Priority List section to understand how to correctly update data elements on the Coordinated Entry Assessment to make sure accurate information is pulled onto the Priority List.

1. Click on **Enter Data As** and select your **Coordinated Entry Assessment** provider (**4314** or **4315**).
2. Enter the Head of Household's record.
3. If you are not doing live or same day data entry, backdate to date of assessment (when the **Back Date Mode** pop-up appears or by clicking on **Back Date** underneath **Enter Data As**).
4. Click on the **Entry/Exit** tab, then select the **Add Entry/Exit** button.

5. Select the following options in the **Project Start Data** pop-up:
    a. **Household Members**: If working with a family, make sure that only the Head of Household has a checkbox next to their name.
    b. **Provider**: Your Coordinated Entry Assessment provider (4314 or 4315).
    c. **Type**: Basic (If needed, you can change Entry Type at the top of the next pop-up via the drop-down and then click on the Update button.)
    d. **Project Start Date**: Your system date, which has been backdated to the client's assessment date (if you are not doing same-day data entry).



6. Click on **Save & Continue**.
7. In second pop-up, complete the **Coordinated Entry Assessment** for the Head of Household. The Priority List report is only designed to pull relevant information from the Head of Household's record.
    a. If the client is currently enrolled in another agency's program, like an emergency shelter, or has been served by a homeless service agency before, data may already appear in the assessment. If this is the case, review the data and confirm it is correct and reflects the status of the household upon its addition to the Priority List. Update any information that is not accurate.
8. Click on **Save & Exit** at the bottom of the assessment when you are finished.

Now that a program entry has been created, the client will appear on Hennepin's Priority List Report.

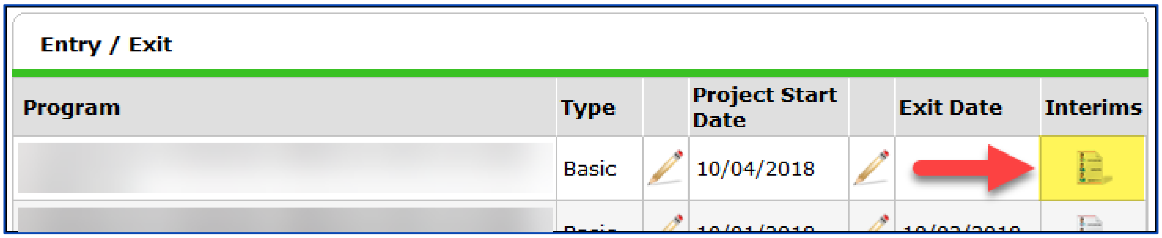
UPDATE DATA WHILE CLIENT IS ON THE PRIORITY LIST

These are the steps to follow if an assessor needs to update data while the client is on the Priority List. Remember to update contact information as this is the information a housing agency will use to get in touch with the participant.

NOTE: If you are adding data that was true for the client upon the Entry Date for your Coordinated Entry Assessment provider, open the Entry Assessment to input the information. If you are updating data that has **changed** since the Entry Date (ex. Income) and was not true as of Entry Date, follow the steps below.

1. Click on **Enter Data As** and select your **Coordinated Entry Assessment** provider (**4314** or **4315**).

2. Enter the Head of Household's record.
3. If you are not doing live or same day data entry, backdate to date of assessment (when the **Back Date Mode** pop-up appears or by clicking on **Back Date** underneath **Enter Data As**).
4. Click on the **Entry/Exit** tab, then select the **Interims** icon:

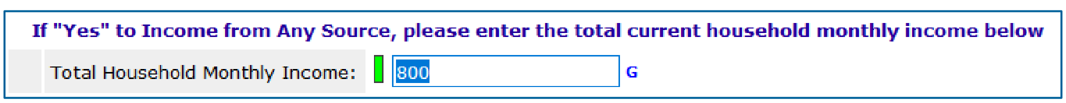


5. Click on **Add Interim Review**. In the **Add Interim Review** pop-up, fill out the following information:
   a. **Interim Review Type**: Update.
   b. **Review Date**: Your system date, which has been backdated to the client's assessment date (if you are not doing same-day data entry).
6. Update information on the Coordinated Entry Assessment for the Head of Household's record.
7. Click on **Save & Exit** at the bottom of the assessment when you are finished.

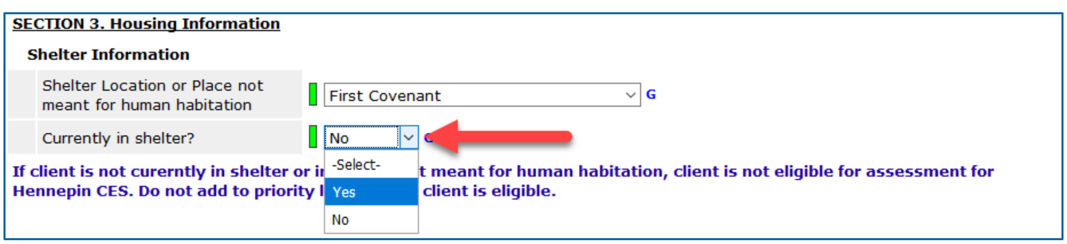
The updated data will be available for the Priority List Report following the next ART refresh.

UPDATE TEXT BOXES OR DROP-DOWN MENUS

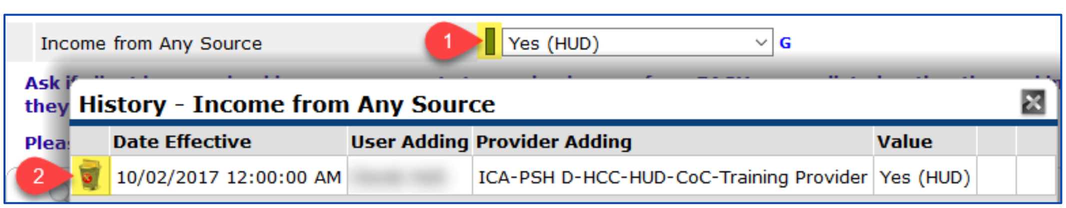
1. To update assessment information, simply overwrite the previous answer.
   a. Text boxes: Enter the most accurate value into the text box.



   b. Drop-down menus: Select the most accurate value from the menu.



2. To delete an answer entered in error, first click on the **History Bar**, then select the **trash can**.

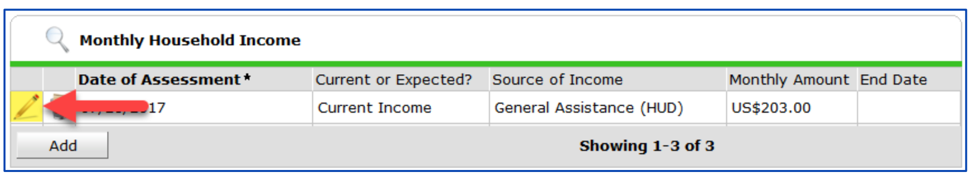


UPDATE SUB-ASSESSMENTS ON THE COORDINATED ENTRY ASSESSMENT

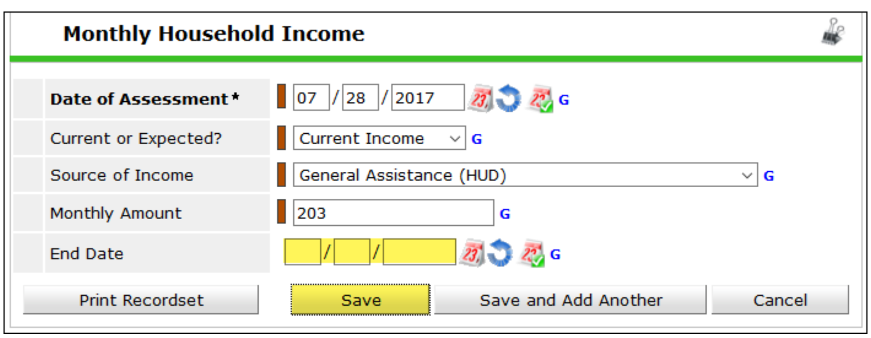
For some sub-assessments (tables throughout the assessment), it is important to “end” previous answers that are no longer accurate so that they do not appear on the Priority List Report. You do not, however, need to update all sub-assessments with an **End Date** as some entries won’t change.

Sub-assessments that do not require End Dates:	Sub-assessments that do require End Dates:
• Housing Summary • CES Date Tracking • VI-SPDAT	• Assessor Info – Step 1 • Assessor Info – Step 2 • CoC Preferences • Housing Preferences • Current Case Manager • Legal Involvement • Barriers to Housing • Monthly Household Income • Demographic Information of Children in Household • Household Disability Information *Not all sub-assessments will appear on your CES Assessment*

1. Find the row that you would like to end, then click on its **edit pencil**.



2. Enter the **End Date**, then click on **Save**.



3. In order to delete a sub-assessment entry that was created in error, you need to have “created” or entered the data in order to delete the record set. If the record set was entered by another agency, you will not be able to delete that record.

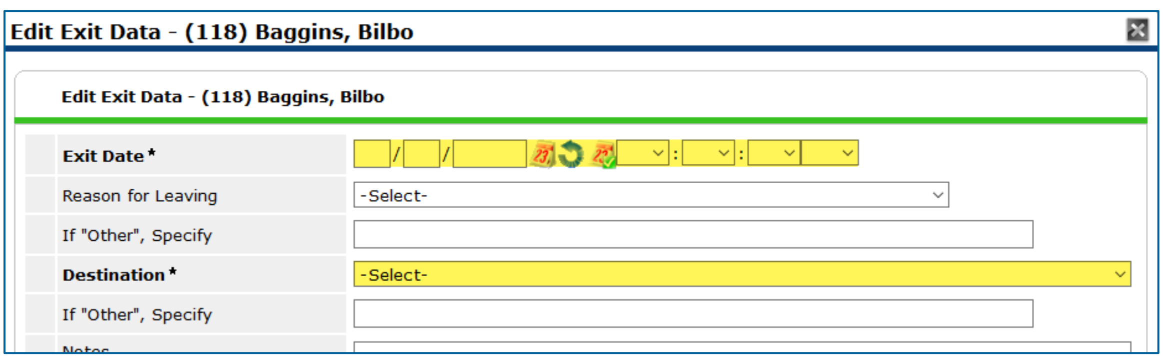
UPDATE A VI-SPDAT

1. If you re-assessed a client, you'll create a new **VI-SPDAT** on the **Coordinated Entry Assessment**.
2. If you need to update an existing **VI-SPDAT** due to error, click the row's **edit pencil**.
    a. If you entered some data in error, you will want to update the assessment with the correct info.

CANCEL: REMOVE A CLIENT FROM THE PRIORITY LIST

If a client has an active referral to a housing agency, contact the case manager to provide a status update (contact information available in the HCC CES Housing Referral Tracking sub-assessment). Do not remove the client from the Priority List. If you determine that a client should no longer be on the Priority List for housing (see Hennepin County CES Policies and supplemental instruction document for reasons why a client should be removed) and *they do not have an active referral to housing*, complete the steps below to remove the client from the Priority List.

1. Click on **Enter Data As** and select your **Coordinated Entry Assessment** provider (**4314** or **4315**).
2. Enter the Head of Household's record.
3. When prompted, select **Use Current System Date**. Do not backdate.
4. Select the **Entry/Exit** tab, then click on the **edit pencil** next to the Coordinated Entry Assessment's blank **Exit Date** field.
5. In the **Edit Exit Data** pop-up, fill out the following fields:
    - **Exit Date**: Today's date, as that is the date you are removing the client from the Priority List.
    - **Destination:** Select the appropriate destination option.



6. Click on **Save & Continue**.
7. Update the data elements under **Section 1** and **Section 2** of the **Coordinated Entry Exit Assessment** to respond to why the client is being removed from the list without being housed through Coordinated Entry.
8. Click on **Save & Exit** at the bottom of the assessment when you are finished.

Note: If a person shows back up in the homeless response system, it is easy to add them back to the Priority List! Just follow steps in the section Place a Client onto the Priority List using the date they are rejoining the Priority List.

OUTREACH STAFF AND SHELTER ADVOCATES DATA ENTRY STEPS

CANCEL: REMOVE A CLIENT FROM THE PRIORITY LIST

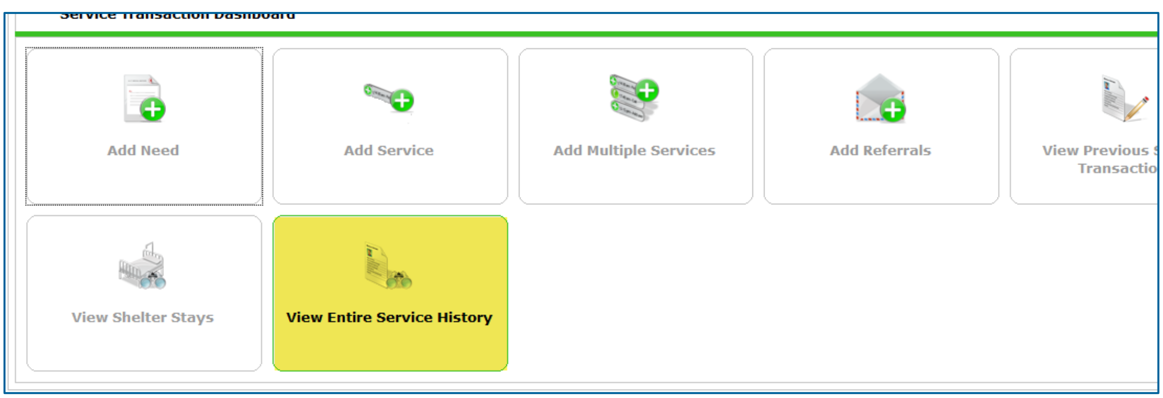
For instructions on removing a client from the priority list, refer to the previous section CANCEL: Remove a Client from the Priority List.

HOUSING AGENCY DATA ENTRY STEPS

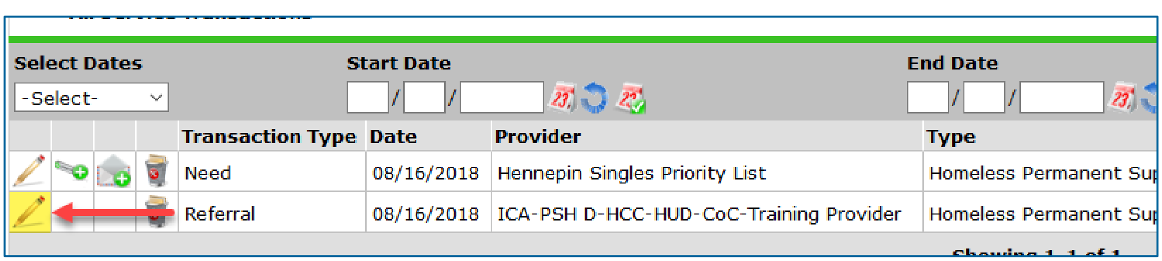
PROVISIONALLY ACCEPT (ACKNOWLEDGE) A REFERRAL

Your CoC's Priority List Manager will run the Priority List Report and make a referral to your housing project directly in HMIS. An identified primary contact at your agency will receive an email when an individual has been matched with your reported housing opening. This email will contain information on which provider the client was referred to, but you must log into HMIS to see the client ID. Read Appendix B: Add a Counts Report to your Home Page to quickly access the client ID referred to your housing opening.

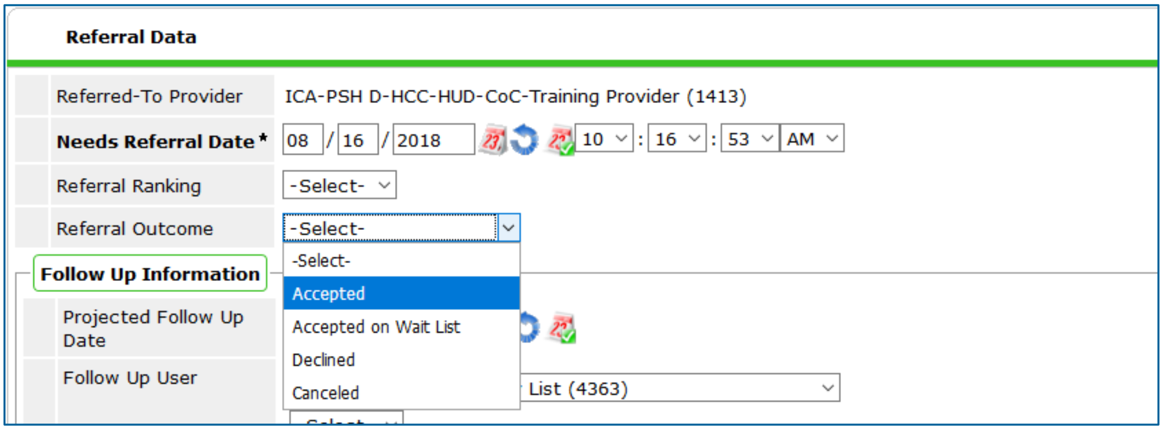
1. Enter **EDA mode** as the provider that has a housing vacancy (i.e. the provider listed in the e-mail).
2. Open the client's record.
3. When prompted, select **Use Current System Date**. Do not backdate.
4. Click on the **Service Transactions** tab.
5. Select **View Entire Service History** to bring you to the Entire Service History tab. If you are having difficulty locating the referral, try clicking on the **Referrals** tab.



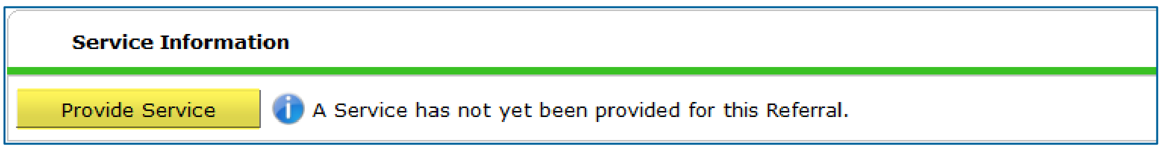
6. Click on the **edit pencil** next to the referral you want to accept. Your housing provider's name be displayed in the **Provider** column.



7. In the **Referral Data** section, change the **Referral Outcome** to **Accepted**.



8. Click on **Provide Service**.

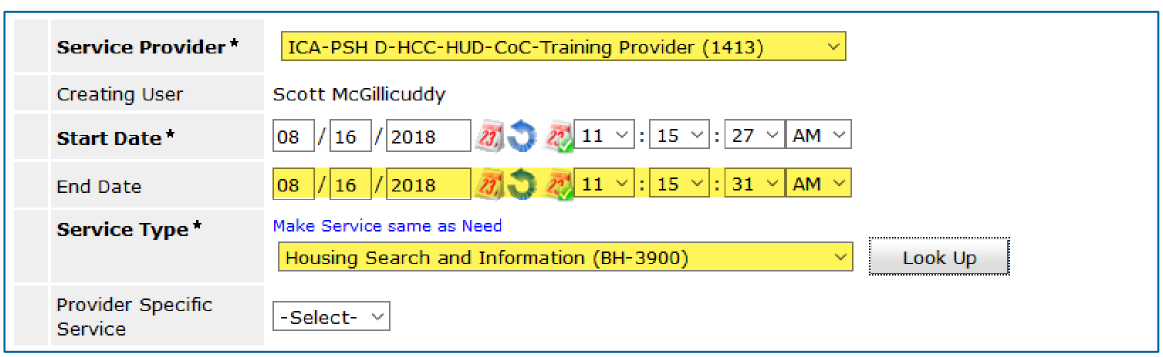


9. The **Service Provider** field should display the name of the housing provider who received the referral.

    a. If the correct provider is not displayed, select the housing provider who received the referral from the **Service Provider** drop-down menu.

10. Enter today's date in the **End Date** field. The Start Date and the End Date may be the same.

11. Select **Housing Search and Information** from the **Service Type** drop-down menu. If that option is not available, you can either select **Look Up** and search for it in the **Service Code Search** pop-up or contact the helpdesk at mnhmis@icalliances.org so that ICA can add it to your drop-down menu.



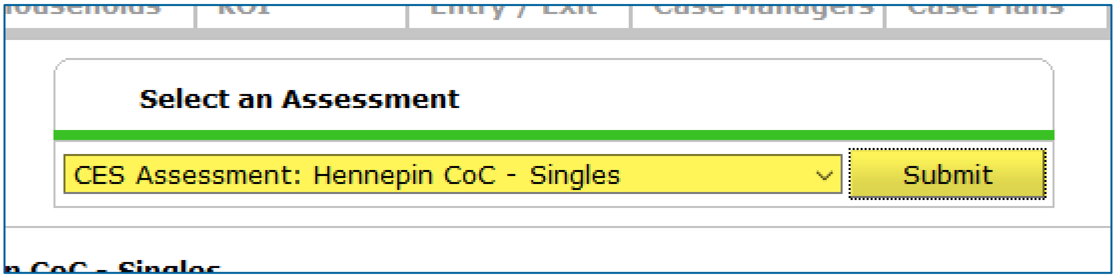
Your Service Provider and Start and End Dates will be different than what you see in the picture.

12. Skip Provider Specific Service and click on **Save & Continue**.

13. A new screen with additional fields will appear. Scroll down to the bottom and click on **Save & Exit**.

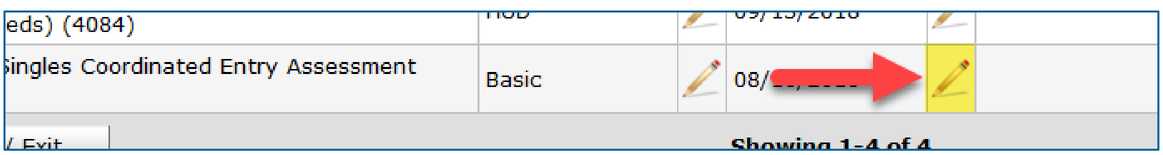
14. To view a client's Coordinated Entry Assessment, you will need to first click on the **Client Information** tab, then select the **Assessments** tab.

15. From the drop-down menu, select the correct Coordinated Entry Assessment for your client (Singles or Families), then click on **Submit**. Email the helpdesk at mnhmis@icalliances.org if you cannot see the assessment.



ENROLL A CLIENT IN YOUR HOUSING PROJECT

1. Enter **EDA mode** as the provider that has a housing vacancy (i.e. the provider listed in the e-mail).
2. Open the client's record.
3. When prompted, enter the date that the client enrolls in your program and click on **Set New Back Date**.
4. Click on the **Entry/Exit** tab.
5. Find the **Coordinated Entry Assessment** program entry and click on the **edit pencil** next to the empty **Exit Date** field. (Note: We realize you are not in EDA to the Coordinated Entry Assessment provider to complete this step.)

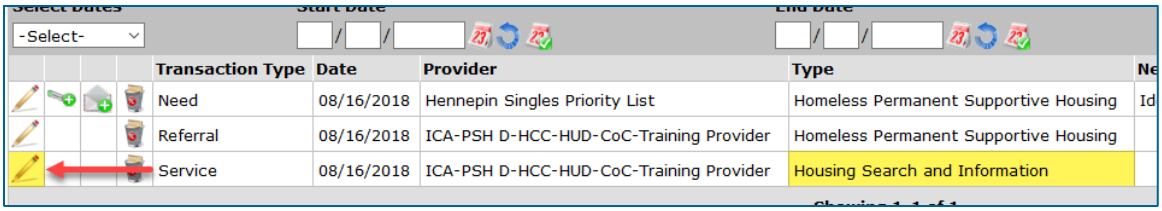


6. In the **Edit Exit Data** pop-up, fill out the following fields:
   a. **Exit Date:** The date that the client enrolls in your housing program. Adding this Exit Date will remove the client from the Priority List.
   b. **Destination:** Select the appropriate destination that matches your housing project type.
7. Click on **Save & Continue**.
8. Close the CES exit assessment. You do not need to answer any data elements.
9. Click on **Add Entry/Exit** and proceed with data entry as you would for any client entering your program.

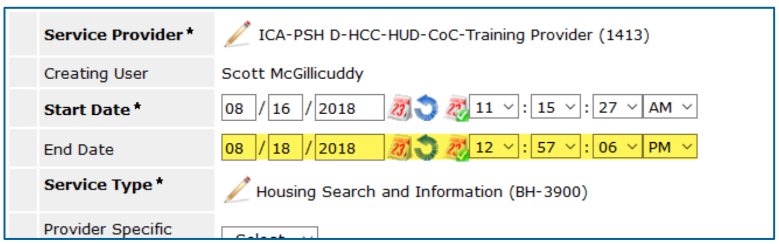
DENY: DECLINE A REFERRAL AND RETURN CLIENT TO PRIORITY LIST

Unable to house a client? (Examples why this might be: Not eligible, no disabling condition, not HUD homeless, individual does not want to participate.) Complete these steps to return a client to the Priority List. If you determine that a client should no longer be on the Priority List for housing (see Hennepin County CES Policies and supplemental instruction document for reasons why a client should be removed), follow the steps under "CANCEL: Decline and Remove a Client from the Priority List."

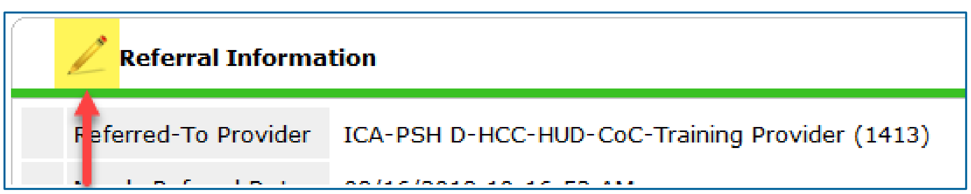
1. Enter **EDA mode** as the housing provider that the client was referred to.
2. Open the client's record.
3. When prompted, select **Use Current System Date**. Do not backdate.
4. Click on the **Service Transactions** tab.
5. Select **View Entire Service History** to list all service transactions.
6. Click on the **edit pencil** next to the service you added for **Housing Search and Information**.



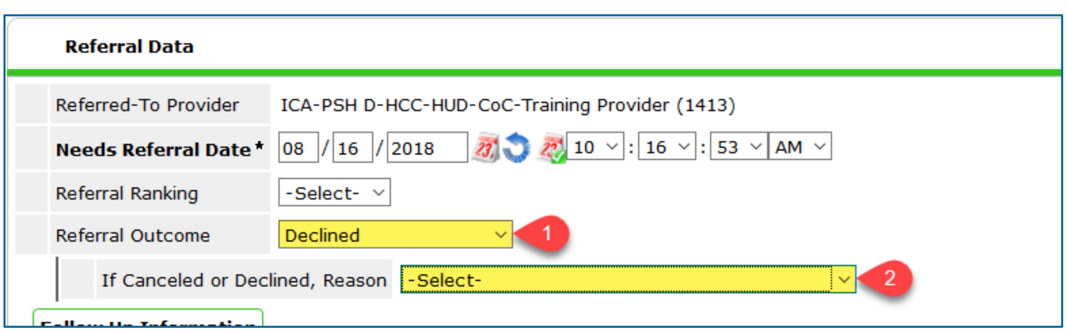
7. Change the service's **End Date** to today's date. This date will be used to inform the Priority List Manager that you were unable to house the client so that they can refer the client to new housing opportunities.



8. Scroll down and click on **Save**. (This step is easy to miss!)
9. Scroll up and click on the **edit pencil** next to **Referral Information**.



10. Select **Declined** from the **Referral Outcome** drop-down menu, then select the reason why the referral was declined.

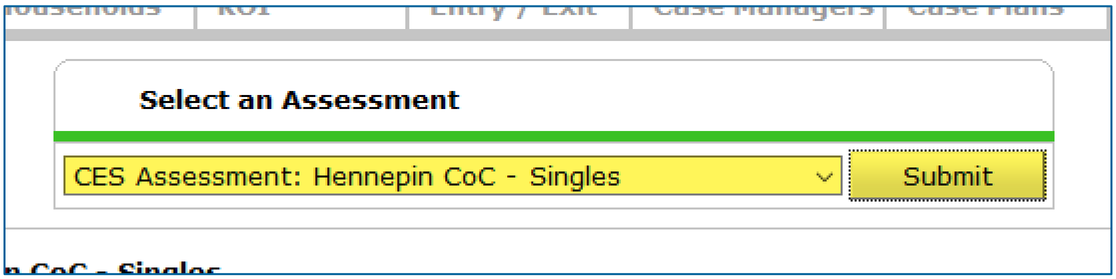


11. Scroll down and click on **Save & Exit**.

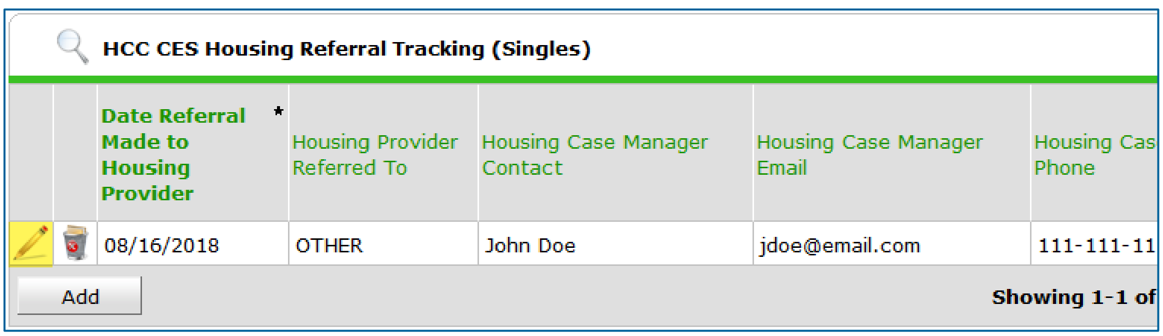
It is important to now update the Housing Referral Tracking sub-assessment within the Coordinated Entry Assessment to clearly communicate the client's referral status to the Priority List Manager.

12. To view a client's Coordinated Entry Assessment, you will need to first click on the **Client Information** tab, then select the **Assessments** tab.

13. From the drop-down menu, select the correct Coordinated Entry Assessment for your client (Singles or Families), then click on **Submit**. Email the helpdesk at mnhmis@icalliances.org if you cannot see the assessment.



14. At the top of the CES assessment, locate the **HCC CES Housing Referral Tracking** sub-assessment. Find your housing provider's referral row and click on its **edit pencil**.



15. In the pop-up, add any helpful notes explaining why the housing referral was denied in the **Denial/Cancellation Notes** field.

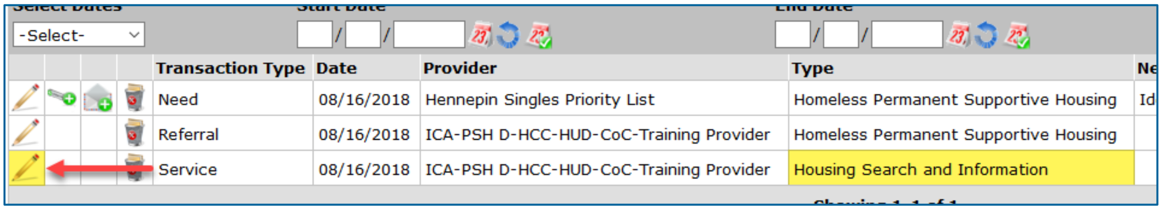
16. Fill in the **End Date** field with the date the referral was declined, then click on **Save**.

CANCEL: DECLINE A REFERRAL AND REMOVE CLIENT FROM THE PRIORITY LIST

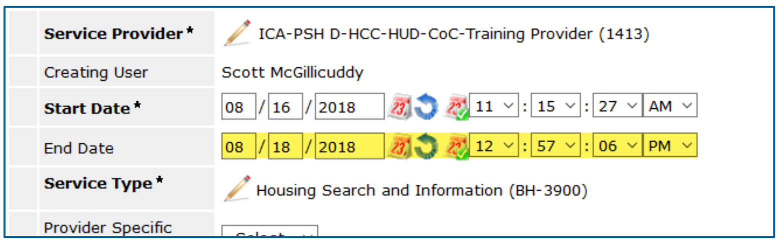
If you determine that a client should no longer be on the priority list - see Hennepin County's CES Policies and supplemental instruction document for reasons why a client should be removed from the priority list - follow the steps below.

1. Enter **EDA mode** as the housing provider that the client was referred to.
2. Open the client's record.
3. When prompted, select **Use Current System Date**. Do not backdate.
4. Click on the **Service Transactions** tab.
5. Select **View Entire Service History** to list all service transactions.

6. Click on the **edit pencil** next to the service you added for **Housing Search and Information**.

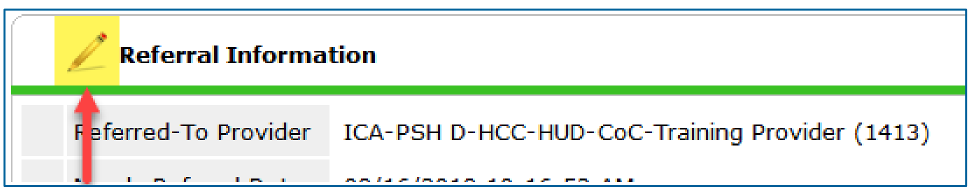


7. Change the service's **End Date** to today's date. This date will be used to inform the Priority List Manager that you were unable to house the client so that they can refer the client to new housing opportunities.

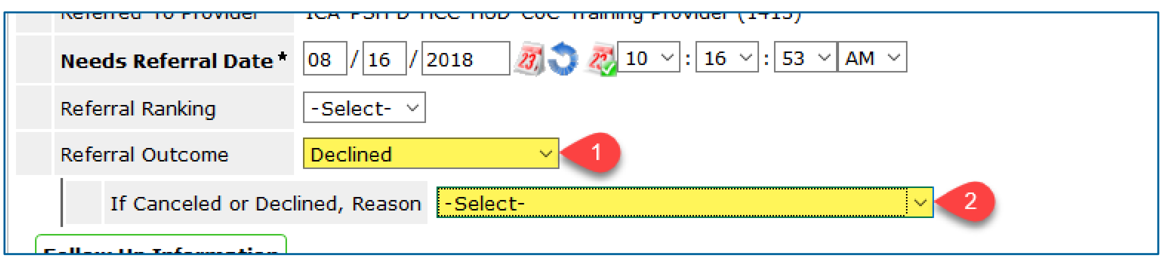


8. Scroll down and click on **Save**. (This step is easy to miss!)

9. Scroll up and click on the **edit pencil** next to **Referral Information**.



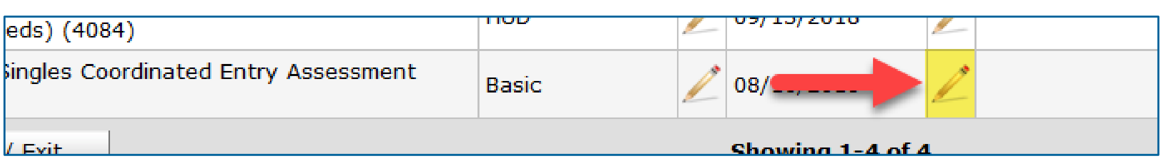
10. Select **Declined** from the **Referral Outcome** drop-down menu, then select the reason why the referral was declined.



11. Scroll down and click on **Save & Exit**.

12. Select the **Client Information** tab, then click on the **Entry/Exit** tab.

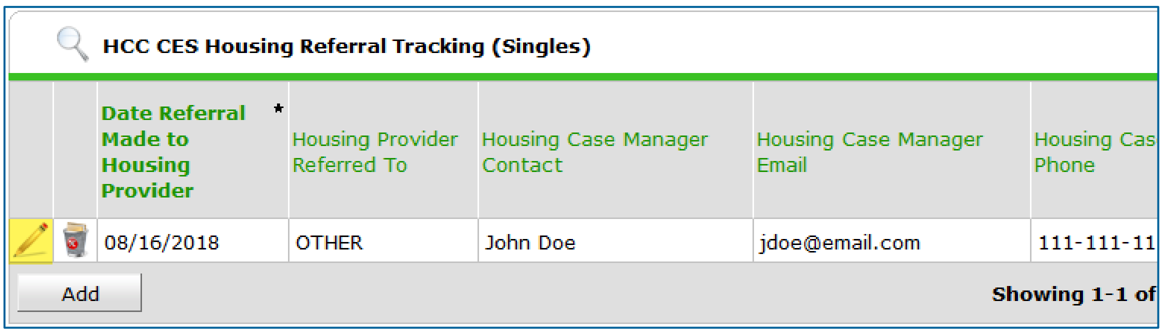
13. Find the **Coordinated Entry Assessment** program entry and click on the **edit pencil** next to the empty **Exit Date** field. (Note: We realize you are not in EDA to the Coordinated Entry Assessment provider as you complete this step.)



14. In the **Edit Exit Data** pop-up, fill out the following fields:
    a. **Exit Date:** Today's date, since you are removing the client from the Priority List today.
    b. **Destination:** Select the most appropriate option from this drop-down menu.
15. Click on **Save & Continue**.

It is important to now update the Housing Referral Tracking sub-assessment within the Coordinated Entry Assessment to clearly communicate the client's referral status to the Priority List Manager.

16. At the top of the CES assessment, locate the **HCC CES Housing Referral Tracking** sub-assessment. Find your housing provider's referral row and click on its **edit pencil**.



17. In the pop-up, add any helpful notes explaining why the housing referral was denied in the **Denial/Cancellation Notes** field.
18. Fill in the **End Date** field with the date the referral was declined, then click on **Save**.
19. Scroll down to the bottom of the assessment and click on **Save & Exit**.

APPENDIX A: INTERPRETTING A CLIENT RECORD TO UNDERSTAND PRIORITY LIST STATUS

There are **two** processes occurring in HMIS for Coordinated Entry in Hennepin CoC. It is important to understand the distinction and how/when to act on BOTH processes.

1. **Place a client onto the Priority List** = Create an Entry Record in the Entry Exit tab into a designated provider
2. **Referral to housing project** = Referrals from the Priority List to a housing project are made directly in HMIS via the Service Transactions tab

PLACE A CLIENT ONTO THE PRIORITY LIST (ENTRY/EXIT TAB)

Entry / Exit

Program	Type		Entry Date		Exit Date	Interims
Hennepin Singles Coordinated Entry Assessment (4314)	Basic		10/15/2017			
PSP Housing Programs-ES-HCC<>Shelter (891)	Basic		09/30/2017			
Add Entry / Exit			Showing 1-2 of 2			

A. An Entry Record into provider 4314 (Hennepin *Singles* Coordinated Entry Assessment) or 4315 (Hennepin *Families* Coordinated Entry Assessment) indicates the client was placed onto the Hennepin Coordinated Entry Priority List.

B. The Entry Date, or Project Start, is the date the client completed a Coordinated Entry Assessment, including the Vi-SPDAT, and was placed onto the Hennepin Coordinated Entry Priority List.

C. If there is an Exit Date, this indicates the client was removed from the Hennepin Coordinated Entry Priority List and is no longer being prioritized for housing. In the image below, the Entry/Exit tab shows the client is enrolled in a housing project at St. Stephen's and was, therefore, removed from the Hennepin Priority List on 11/30/2017 (Exit Date from the Coordinated Entry Assessment provider).

Entry / Exit

Program	Type		Entry Date		Exit Date	Interims
St. Stephen's-RRH-HCC-MN HSG-FHPAP-Henn-Singles Doubled Up HA (4575)	Basic		11/30/2017			
Hennepin Singles Coordinated Entry Assessment (4314)	Basic		10/15/2017		11/30/2017	
PSP Housing Programs-ES-HCC<>Shelter (891)	Basic		09/30/2017		11/15/2017	

D. If there is a blue circle with a number under the Interims icon, this indicates someone has been in contact with a client and updated their assessment data since their Entry Date. The number indicates how many times the Coordinated Entry Assessment was updated after Entry, and before Exit.

You can open the Entry Record (pencil to the left of the Entry Assessment), the Exit Record (pencil to the left of the Exit Date if there is an Exit Date populated), or an Interim Record (by clicking on the Interim icon and then clicking on the pencil to the left of an Interim Record) to see assessment answers for a "snapshot" of time based on the information date (Entry Date, Exit Date, or Interim Record Date), or you can click on the Assessments tab to see all data entered as of the system date (today's date, or date of backdate mode).

REFERRALS TO HOUSING PROJECT (SERVICE TRANSACTIONS TAB)

Pending Referral to a Housing Project

The Priority List Manager in your CoC will know of a housing opening at a project and will send a referral (client ID) directly to the housing project within HMIS. You can see the documentation of this process by clicking on the Service Transactions tab – Entire Service History sub-tab.

Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
Need	10/20/2017	Hennepin Singles Priority List	Rapid Re-Housing Programs	Ide	
Referral	10/20/2017	CCSPM-RRH-HCC-MN HSG-FHPAP-Singles Doubled Up HA	Rapid Re-Housing Programs		

In the image above, a Referral (Transaction Type column) is out to a Housing Project (Provider column) for the specific project type (Type column). The housing agency has not yet acknowledged this referral in the system as there is not an associated Service Transaction (Transaction Type). More on that to come! You do not need to pay attention to the Need Status/Outcome or Need Goal columns on the Entire Service History tab.

Housing Agency Acknowledges the Referral

The housing agency documents when they have received this referral by adding an associated service in the system of "Housing Search and Information" and changing the referral outcome to "Accepted." When the associated service is there, that indicates the agency has acknowledged the incoming referral from the Priority List and are working on to contact the client. An associated service of "Housing Search and Information" does not indicate the client has enrolled with the housing project.

Transaction Type	Date	Provider	Type
Need	10/20/2017	Hennepin Singles Priority List	Rapid Re-Housing Programs
Referral	10/20/2017	CCSPM-RRH-HCC-MN HSG-FHPAP-Singles Doubled Up HA	Rapid Re-Housing Programs
Service	10/20/2017	CCSPM-RRH-HCC-MN HSG-FHPAP-Singles Doubled Up HA	Housing Search and Information

If the client record has a lot of Service Transactions, it may be difficult to find what you are looking for. Try clicking on the Referrals tab and using the built-in filters towards the top. From this tab, you should be able to see if the referral has been Accepted. The only columns to pay attention to here are the Referred Date, Referred To, Referral Outcome, and Need Type. If the Referral Outcome is null (blank), the referral from the Hennepin Priority List has not yet been acknowledged by the housing project.

Referred Date	Referred To	Referral Outcome	Need Type
10/20/2017	CCSPM-RRH-HCC-MN HSG-FHPAP-Singles Doubled Up HA	Accepted	Rapid Re-Housing Programs

If the client has a lot of referrals, they may represent different types of referrals (like for mental health case management services, for example). You'll want to pay attention to any with the following Need Types (Need Type column) as those indicate referrals for housing from the Priority List: Homeless Permanent Supportive Housing, Rapid Re-Housing Programs, and Transitional Housing/Shelter.

Homeless Permanent Supportive Housing (BH-8400.3000)
Rapid Re-Housing Programs (BH-0500.7000)
Transitional Housing/Shelter (BH-8600)

On the Service Transactions tab – Referrals sub-tab, you can see the client has a declined referral with CCSPM and a pending referral with Simpson.

Referred Date	Referred To	Referral Outcome	Need Type
10/30/2017	Simpson Single-RRH-HCC-MN HSG-FHPAP-Henn-X Doubled Up HA		Rapid Re-Housing Programs
10/20/2017	CCSPM-RRH-HCC-MN HSG-FHPAP-Singles Doubled Up HA	Declined	Rapid Re-Housing Programs

HCC CES HOUSING REFERRAL TRACKING SUB-ASSESSMENT

This table is designed to be an easy-to-digest summary of a client's referral status and can be used to let the individual know who to contact for pending housing opportunities. This sub-assessment is a communication tool used in Hennepin to understand any activity related to housing referrals while someone sits on the Priority List. This table is for documentation purposes only and has no functionality related to the Priority List.

HCC CES Housing Referral Tracking (Singles)

	Date Referral Made to Housing Provider *	Housing Provider Referred To	Housing Case Manager	Housing Case Manager Email	Housing Case Manager Phone	Referral Status Notes (Inlcude date of update. Do not include denial/cancellation information)	End Date: Record the date the referral was declined or cancelled
	10/30/2017	MATRIX - RRH	Mona-Lisa Saperstein	monalisa@matrix.org	6127777777		
	10/20/2017	CATHOLIC CHARITIES - RRH	Dr. Richard Nygard	nygard@ccspm.org	6125555555		10/22/2017

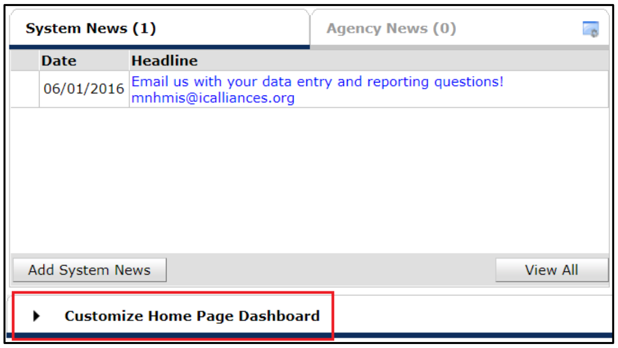
Add | **Showing 1-2 of 2**

In the image above, the individual has a referral to Matrix Housing. This table tells you that this a current, active referral as there is no End Date recorded in the last column. The housing case manager at Ascension Place is provided so that you and the client know who to contact regarding this housing opportunity.

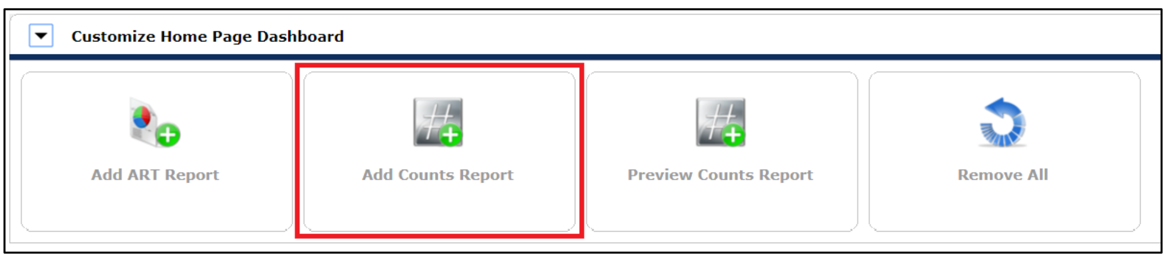
APPENDIX B: ADD A COUNTS REPORT TO YOUR HOME PAGE

This section is only applicable to housing projects that receive referrals from the Coordinated Entry Priority List. The primary contact at your agency may have received an email notification notifying your agency that a client has been referred to a housing opening at your agency. The email notification does not contain the client ID. An HMIS User will need to login to HMIS and either (1) run a Referrals report or (2) *recommended* add a Counts report to their home page. You only need to add the Counts report once; it will stay on your home page until you remove it.

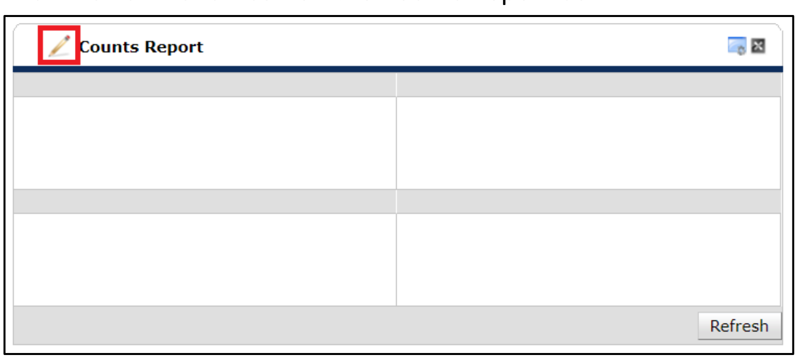
1. On the Home Page Dashboard, click on the **Customize Home Page Dashboard** at the bottom of the screen:



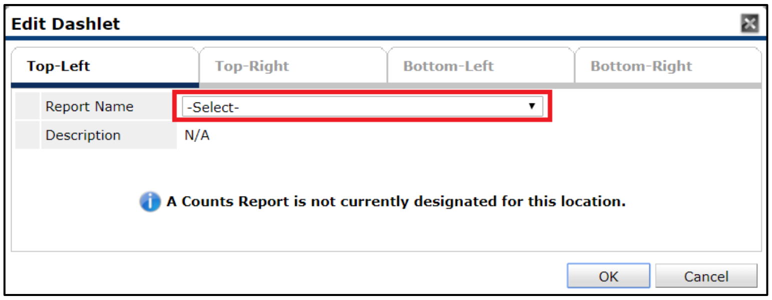
2. Click Add Counts Report.



3. Click the Edit Pencil icon on the Counts Report box.

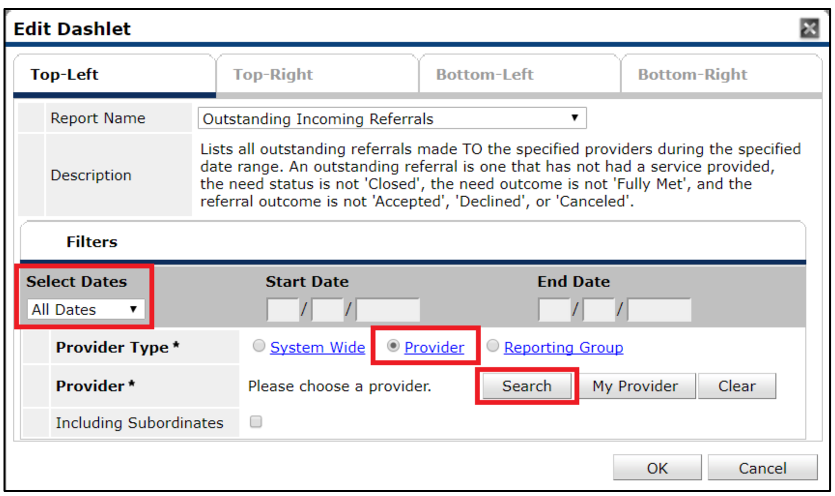


4. Select the Report Name you would like in the Top-Left box of the Counts Report

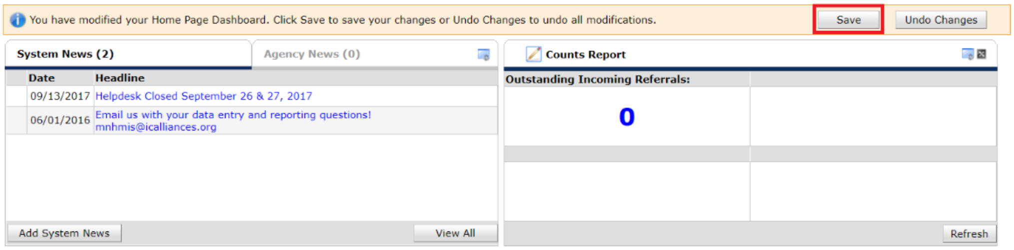


5. The Counts Report for users who will be accepting Coordinated Entry referrals from a Priority List Manager is **Outstanding Incoming Referrals.** This report lists all outstanding referrals made TO the specified providers during the specified date range. An outstanding referral is a referral that does not have a referral outcome of ‘Accepted,’ ‘Declined,’ or ‘Canceled.’

6. When using the **Outstanding Incoming Referrals** Counts Report**,** select the following:
    a. Select Dates: All Dates
    b. Provider Type: Provider
    c. **Provider:** Search for the housing provider that the Priority List Manager will be sending Coordinated Entry referrals to.



7. If you have multiple housing providers accepting referrals, you can create a Counts Report for those providers. Click on Top-Right and choose the next count you would like on your dashboard. Repeat steps 4-6 for the remaining available quadrants within the dashlet.
    a. If you have more than 4 providers, choose your agency’s “(no data entry)” provider and click on “Including Subordinates” to pull in referrals to all of your agency providers underneath the “(no data entry)” provider.
8. Click Save at the top of the Home Page Dashboard:



9. The numbers that appear in the Counts Report are hyperlinks that when clicked on will open a pop-up window and a list of clients that are in the count. The client ID numbers are hyperlinks to the client's file.

APPENDIX C: OVERVIEW OF THE HCC CES HOUSING REFERRAL TRACKING SUB-ASSESSMENT

This table is designed to be an easy-to-digest summary of a client's referral status and can be used to let the individual know who to contact for pending housing opportunities. This sub-assessment is a communication tool used in Hennepin to understand any activity related to housing referrals while someone sits on the Priority List. This table is for documentation purposes only and has no functionality related to the Priority List.

This table is subject to change as the Coordinated Entry System's use of this table evolves. The information provided below is what was true as of 10/27/2017.

HOW DO I ACCESS THIS SUB-ASSESSMENT?

1. EDA to your project provider.
2. Open the client's record.
3. Do not backdate, which will allow you to view the most up-to-date information.
4. Click on the Assessments tab.
5. From the drop-down, search for Hennepin's Coordinated Entry Assessment (CES Assessment: Hennepin – Singles or CES Assessment: Hennepin – Families). The HCC CES Housing Referral Tracking sub-assessment should appear at the top. Email mnhmis@icalliances.org if you do not see the CES Assessment.
6. Click on Submit.

WHO COMPLETES THIS SUB-ASSESSMENT?

Housing referral coordinators populate fields based on the information provided to them in the Vacancy Request Form, which is completed when a housing agency reports a vacancy requesting a referral. This will be the most up-to-date information they have regarding the contact information for the agency. They complete any fields in green.

Housing agencies are asked to respond to the fields in blue to keep the community up-to-date on the referral status. They complete any fields in blue and are asked to provide updated information to the green fields as they are able to provide the system with the best information available.

HCC CES Housing Referral Tracking (Singles)

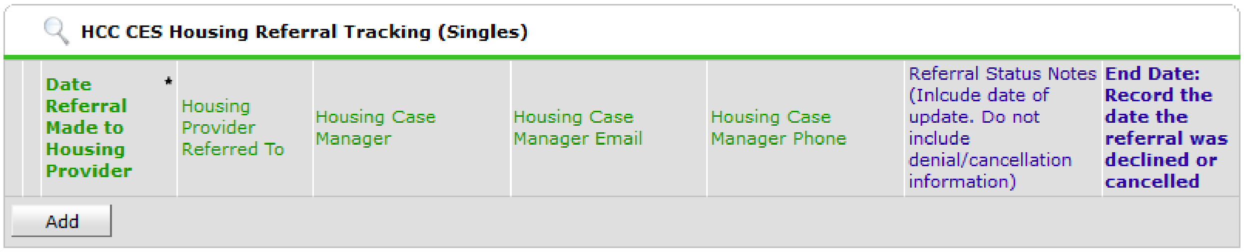
		Date Referral Made to Housing Provider *	Housing Provider Referred To	Housing Case Manager	Housing Case Manager Email	Housing Case Manager Phone	Referral Status Notes (Inlcude date of update. Do not include denial/cancellation information)	End Date: Record the date the referral was declined or cancelled
		10/30/2017	MATRIX - RRH	Mona-Lisa Saperstein	monalisa@matrix.org	6127777777		
		10/20/2017	CATHOLIC CHARITIES - RRH	Dr. Richard Nygard	nygard@ccspm.org	6125555555		10/22/2017

Add — Showing 1-2 of 2

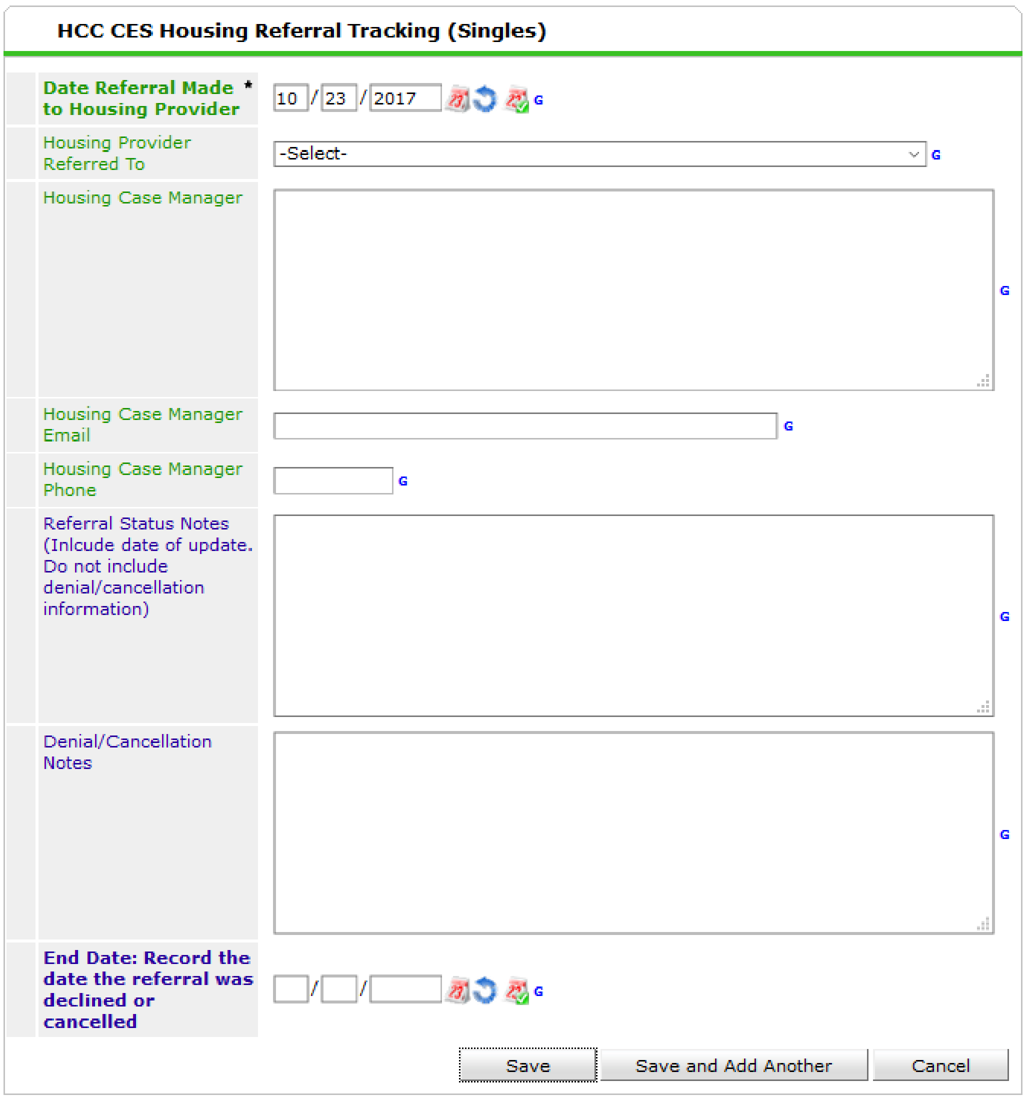
In the image above, the individual has a referral to Matrix Housing. This table tells you that this a current, active referral as there is no End Date recorded in the last column. The housing case manager at Ascension Place is provided so that you and the client know who to contact regarding this housing opportunity.

FIELDS FOR SINGLES

This is what the sub-assessment will look within the CES Assessment: Hennepin CoC – Singles.



Here are the fields available for each record. (Green fields are completed by the housing referral coordinator(s); blue fields are completed by the housing project.)



FIELDS FOR FAMILIES

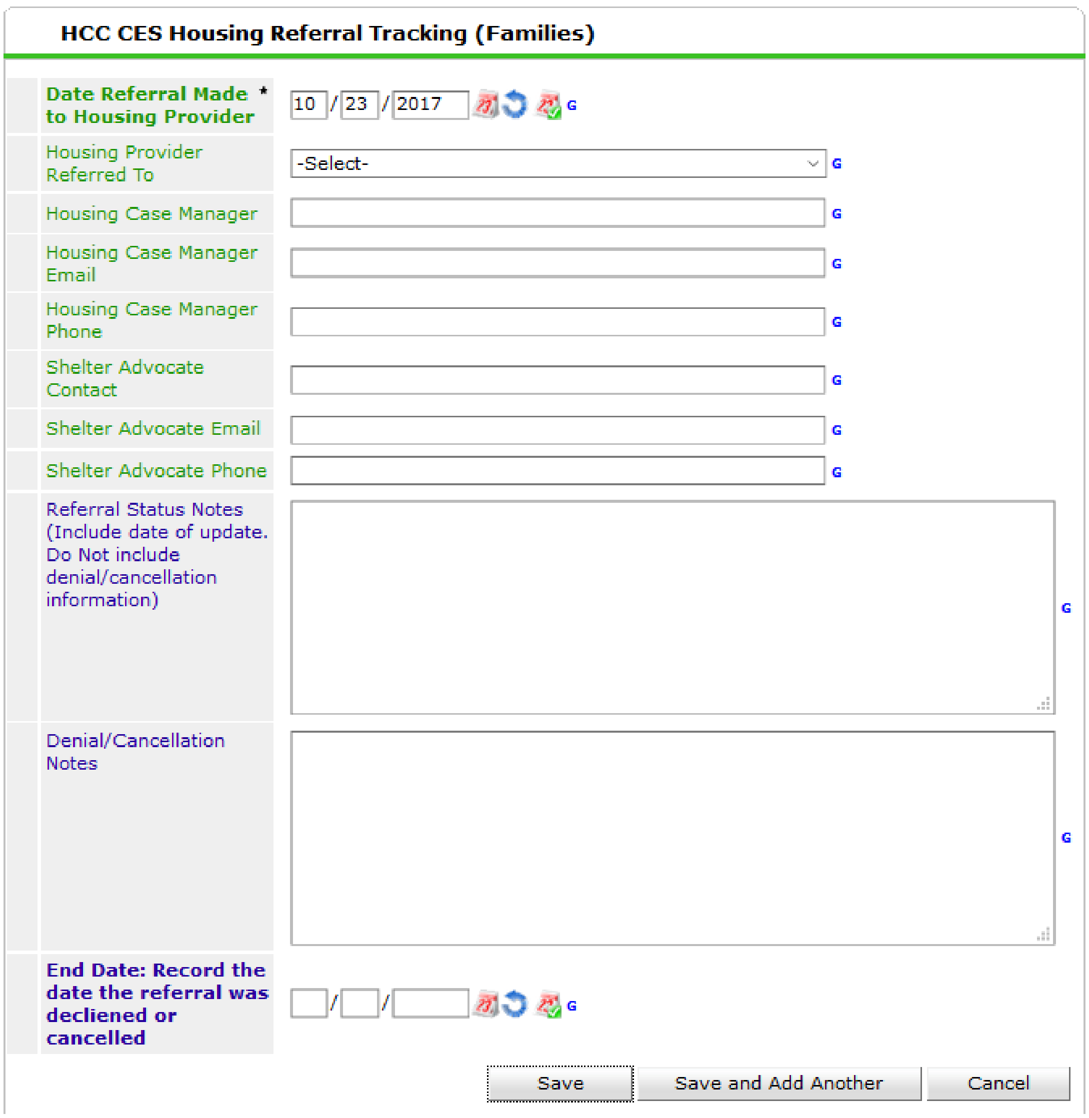
This is what the sub-assessment will look within the CES Assessment: Hennepin CoC – Families.

HCC CES Housing Referral Tracking (Families)

Date Referral Made to Housing Provider *	Housing Provider Referred To	Housing Case Manager	Housing Case Manager Email	Housing Case Manager Phone	Shelter Advocate Contact	Shelter Advocate Email	Shelter Advocate Phone	Referral Status Notes (Include date of update. Do Not include denial/cancellation information)	End Date: Record the date the referral was decliened or cancelled

Add

Here are the fields available for each record. (Green fields are completed by the housing referral coordinator(s); blue fields are completed by the housing project.)



HCC CES Housing Referral Tracking (Families)

Date Referral Made to Housing Provider *	10 / 23 / 2017
Housing Provider Referred To	-Select-
Housing Case Manager	
Housing Case Manager Email	
Housing Case Manager Phone	
Shelter Advocate Contact	
Shelter Advocate Email	
Shelter Advocate Phone	
Referral Status Notes (Include date of update. Do Not include denial/cancellation information)	
Denial/Cancellation Notes	
End Date: Record the date the referral was decliened or cancelled	/ /

Save | Save and Add Another | Cancel