Institute for Community Alliances

HMIS USER GUIDE FOR HUD ESG PROJECTS

Homelessness Prevention (HP) | Rapid Re-Housing (RRH)

Contents

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QUICK REFERENCE GUIDE

THIS SECTION PROVIDES SIMPLIFIED INSTRUCTIONS FOR COMMON DATA ENTRY TASKS. PLEASE REFER TO THE GENERAL HMIS INSTRUCTIONS AND UPCOMING SECTIONS OF THIS DOCUMENT FOR FURTHER INSTRUCTION.

CREATE A NEW CLIENT RECORD

1. Enter **EDA mode** as the correct provider and search for the client's record in **ClientPoint**.
    a. If entering data for a household, be sure to search for the head of household.
2. Make sure that the client is not already in HMIS by searching for different combinations of their information.
    a. If you are provisionally accepting a referral from your CoC's Coordinated Entry System for a housing opening, select your project provider (the project that has an opening the client may be filling at your agency) when entering EDA mode.
3. If no records match, fill out all of the search prompts and click on **Add New Client With This Information**.
    a. If the client has consented to participate in statewide data sharing, enter the word **SHARED** in the **Alias** field.
    b. If receiving a Coordinated Entry referral, you can go directly to the client's record using the client ID given to you by your CoC's Priority List Manager.
4. When prompted, enter the date of the client's entry into the project and select **Set New Back Date**. If the client entered the project today, select **Current System Date**. (The date can be changed by clicking on **Back Date** in the top-right corner of the screen).
    a. If receiving a Coordinated Entry referral, you do not need to Back Date at this point. Please refer to the steps given in the "CES in HMIS Written Instructions" document for your CoC's workflow.
5. Select the **Client Profile** tab and enter any information missing from the **Universal Profile** assessment.
    a. If a client has agreed to statewide data sharing, enter a **Date of ROI Consent**.
6. If the client is being served with other household members, click on the **Households** tab and either add them to an existing household or start a new household.

Enter a Client into a Project

1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**.
    a. If entering data for a household, be sure to search for the head of household.
2. When prompted, enter the date of the client's entry into the project and select **Set New Back Date**. If the client entered the project today, select **Current System Date**.
    a. Click on **Back Date** in the top-right corner of the screen to change the date.
3. Click on the **Entry / Exit** tab and select **Add Entry / Exit**.
    a. If entering a household, check the box next to each client included in the entry.
    b. Select **HUD** from the **Type** drop-down menu.
    c. If necessary, adjust the **Project Start Date**, then select **Save & Continue**.
4. For each client included in the entry, complete the data elements on the **HUD ESG All-Inclusive B** assessment in the **Entry/Exit Data** pop-up.
    a. If entering data for multiple household members, save time by clicking on **Add Household Data** and completing the **Household Data Sharing** assessment.

Update a Client's Information

Clients participating in a **Homelessness Prevention** project must have their information updated every 3 months. **Rapid Re-Housing** projects are required to update information for clients on an annual basis, within 30 days of a client's or head of household's anniversary date.

1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**.
2. Click on the **Entry/Exit** tab, then select the **Interims** icon for the correct Entry/Exit.
3. In the **Interim Reviews** pop-up, click on **Add Interim Review**.
    a. Select **Annual Assessment** (RRH projects) or **90-Day Review** (HP projects) from the **Interim Review Type** drop-down menu.
    b. If serving a household, be sure to include all applicable household members in the entry by checking the boxes next to their names.
4. In the **Entry/Exit Interim Review** pop-up, review the **HUD CoC & ESG Update (2017) – MN** assessment answers. Update any answers that are no longer correct with the latest accurate information.

Exit a Client from a Project

1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**.
2. Click on the **Entry/Exit** tab, then select the **edit pencil** (in the **Exit Date** column) next to the correct entry.
    a. If exiting a household, be sure to include all applicable household members in the exit by checking the boxes next to their names.
    b. Enter the correct **Exit Date** and **Destination**, then click on **Save & Continue.**
3. Complete the **Exit HUD** assessment for each household member.

RUN A REPORT

For more information about HUD ESG Reports, refer to the user guide section Reporting Guidelines.

1. Click on **Reports** to open the **Report Dashboard**. Select **ESG CAPER**.
2. Fill out the prompts in the **Report Options** section, then click on **Build Report**.
3. Review sections **6a – 6f** to identify data quality issues.
4. Click on **Download** to get a zip archive containing the CSV files required for submission to Sage.

DATA COLLECTION FORMS

DATA COLLECTION FORMS FOR HUD ESG PROJECTS CAN BE FOUND BY FOLLOWING THE LINKS PROVIDED BELOW OR VISITING THE FORMS AND INSTRUCTIONS PAGE ON THE MINNESOTA HMIS WEBSITE. THESE FORMS WILL CHANGE AS NEW DATA STANDARDS ARE RELEASED ANNUALLY ON JULY 1 (MINNESOTA) AND OCTOBER 1 (HUD).

You are not required to use ICA's data collection forms. Staff responsible for data collection should also be aware that their agency may require them to gather non-HMIS data that is not captured by these forms.

FAMILIES

Household ESG Entry – All Other Project Types

Household ESG Interim

Household ESG Exit

INDIVIDUALS

Single ESG Entry – All Other Project Types

Single ESG Interim

Single ESG Exit

PROGRAM-SPECIFIC DATA ELEMENTS

Program Specific Data Elements have been chosen by your funder and are often unique to the types of projects they fund. More information about these data elements can be found in the HMIS Data Standards Manual.

4.18 HOUSING ASSESSMENT DISPOSITION

Assessment Disposition	Referred to emergency shelter/safe haven ▾ G
If Other Assessment Disposition, specify	G

Project Type Applicability: 12: Homelessness Prevention and 13: Rapid Rehousing

Data Collected About: Head of Household **Data Collection Point:** Project Exit

Rationale: To track client disposition following a brief assessment of critical housing needs, such as at a prevention project. This data element may be used as part of a coordinated assessment system if appropriate for the CoC's system.

Data Collection Instructions: Indicate the appropriate disposition of the client following a housing crisis assessment once at or before project exit. The Housing Assessment Disposition element is only required for projects that are doing coordinated assessments as part of a CoC's coordinated entry system, to capture information and efforts made to house the client for planning purposes.

W5 HOUSING ASSESSMENT AT EXIT

Housing Assessment at Exit	Client became homeless - moving to a shelter or other place unfit for human habitation ▾ G
If Able to maintain housing at entry, Subsidy Information	-Select- ▾ G
If Moved to new housing unit, Subsidy information	-Select- ▾ G

Project Type Applicability: 12: Homelessness Prevention

Data Collected About: All Clients **Data Collection Point:** Project Exit

Rationale: To determine whether clients exiting prevention projects have remained stably-housed.

Data Collection Instructions: Determine the response value that best describes the client’s housing circumstances from project entry to project exit.

REPORTING GUIDELINES

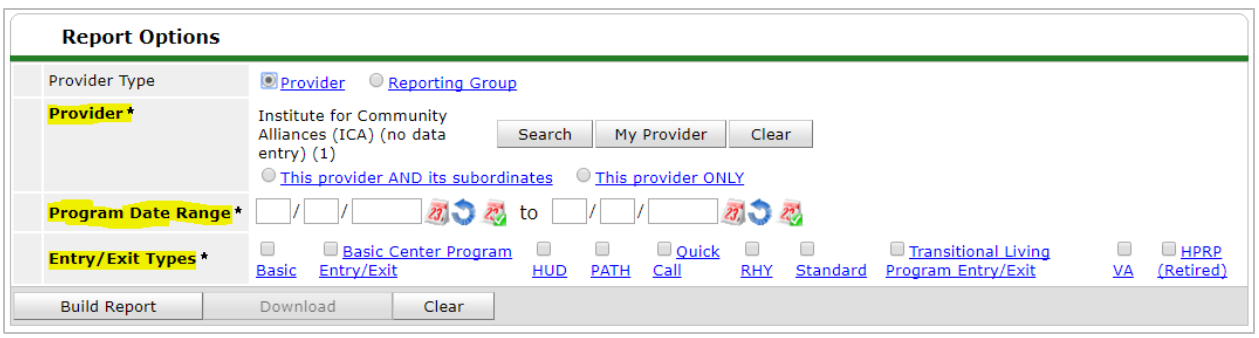
This section introduces the data quality and funder-required reports for HUD ESG projects. Users should run data quality reports regularly to ensure that accurate information is being provided to funders and other agencies.

DATA QUALITY REPORTS

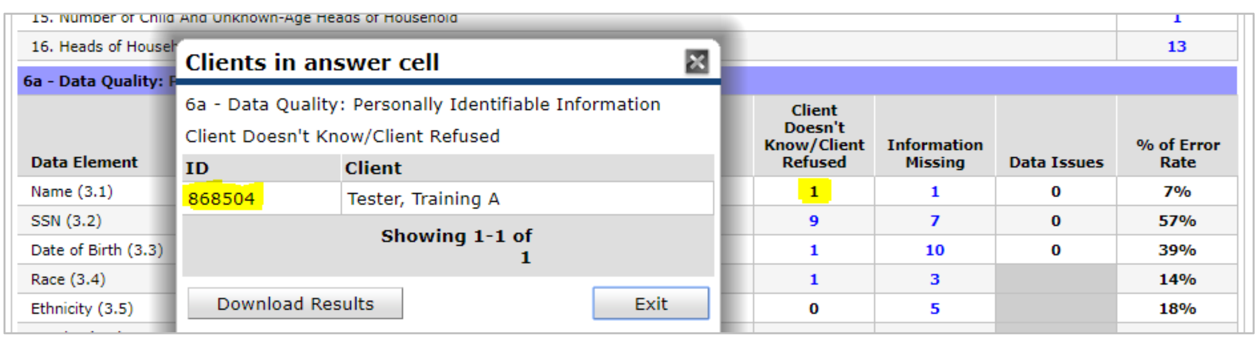
Name: ESG CAPER (HDS V5)

Location: Report Dashboard

Required Prompts: Provider, Program Date Range, Entry/Exit Types



Data Quality Instructions: Sections 6a – 6f of the CAPER are focused on data quality. To view client records flagged as containing an error, click on the blue number in the desired cell.

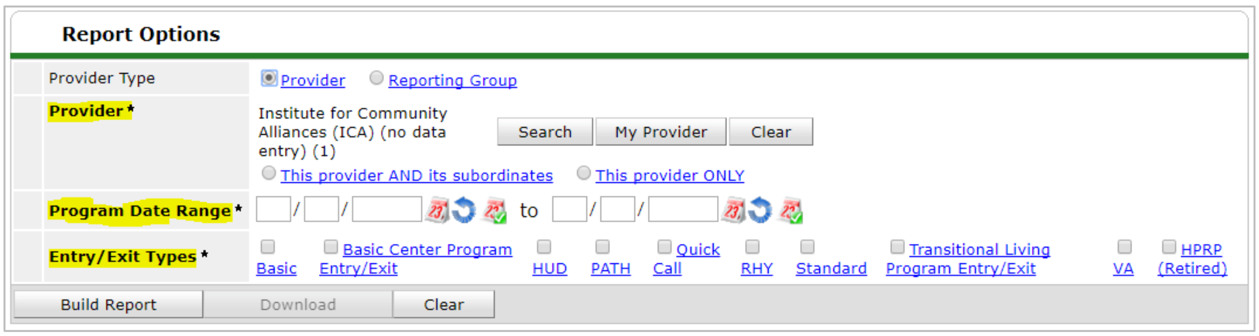


FUNDER-REQUIRED REPORTS

Name: ESG CAPER (HDS V5)

Location: Report Dashboard

Required Prompts: Provider, Program Date Range, Entry/Exit Types



Submission Frequency: Annually, within 90 days of grant year-end

Submission Instructions: Beginning in October 2017, ESG recipients should upload their CAPERs to the Sage HMIS Reporting Repository (Sage). ESG sub-recipients will be sent a hyperlink by their grantees that they can use to submit their own CAPERs to Sage.

- ESG grantees are responsible for communicating report due dates to sub-grantees.
- Review the ESG CAPER instructions on the Minnesota HMIS website for a step-by-step explanation on how to run this report, tips on analyzing the report's contents, and for guidance submitting the CAPER to your ESG grantee.