HMIS USER GUIDE FOR COC PROJECTS

PERMANENT SUPPORTIVE HOUSING (PSH) | RAPID RE-HOUSING (RRH)
TRANSITIONAL HOUSING (TH) | STREET OUTREACH (SO)
HOMELESSNESS PREVENTION (HP) | SUPPORTIVE SERVICES ONLY (SSO)

Contents

DATA ENTRY QUICK REFERENCE

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 open the client's record in **ClientPoint**.
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, you can 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 create 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, you can select **Current System Date**.
   a. The date can be changed by clicking on **Back Date** in the top-right corner of the screen.
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 **CoC All-Inclusive 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

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** (all project types) 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 newest 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 CoC Reports, refer to the user guide section titled Reporting Guidelines.

1. Click on **Reports** to open the **Report Dashboard**. Select **CoC-APR**.
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 HDX submission.

DATA COLLECTION FORMS

DATA COLLECTION FORMS FOR DHS HOUSING SUPPORT 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), SO YOU SHOULD REDOWNLOAD THEM OCCASIONALLY TO ENSURE YOU ARE USING THE LATEST VERSIONS.

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

HMIS DATA COLLECTION FORM FOR HOUSEHOLD ENTRIES – Emergency Shelter, Street Outreach

HMIS DATA COLLECTION FORM FOR HOUSEHOLD ENTRIES – All Other Project Types

HMIS DATA COLLECTION FORM FOR HOUSEHOLD INTERIM

HMIS DATA COLLECTION FORM FOR HOUSEHOLD EXITS

INDIVIDUALS

HMIS DATA COLLECTION FORM FOR INDIVIDUAL ENTRIES – Emergency Shelter, Street Outreach

HMIS DATA COLLECTION FORM FOR INDIVIDUAL ENTRIES – All Other Project Types

HMIS DATA COLLECTION FORM FOR INDIVIDUAL INTERIM

HMIS DATA COLLECTION FORM FOR INDIVIDUAL EXITS

PROGRAM-SPECIFIC DATA ELEMENTS

Program-specific data elements are chosen by your funder and are often unique to the types of projects they fund. More information about these data elements, and other common data elements, can be found in the HUD CoC Program Manual and Minnesota HMIS Data Standards Guide.

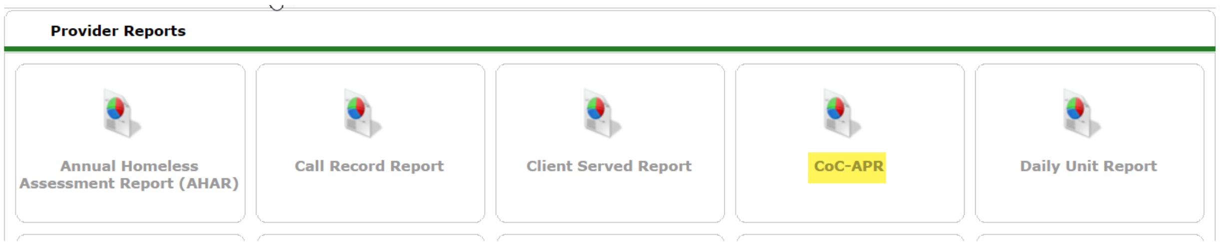
REPORTING GUIDELINES

This section introduces the data quality and funder-required reports for CoC projects. Users should run data quality reports regularly to ensure that accurate information is being provided to funders and other agencies. For information about reporting periods, due dates, and changes to requirements, refer to communications from funders. A Guide to the CoC APR is available for additional guidance on using the APR for Data Quality and for submission.

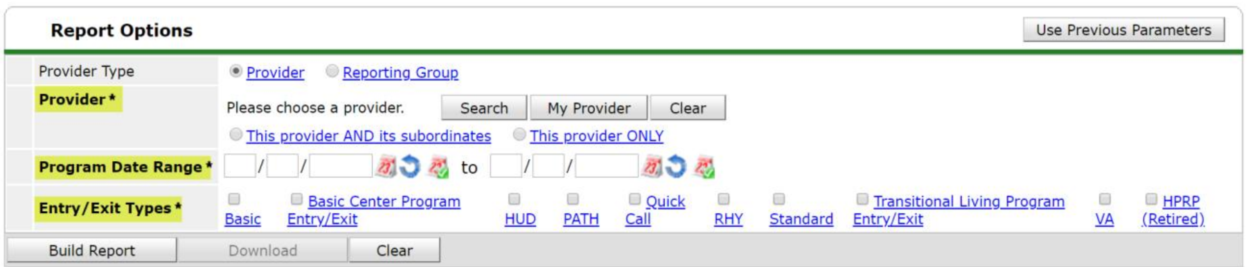
DATA QUALITY REPORTS

Name: CoC APR

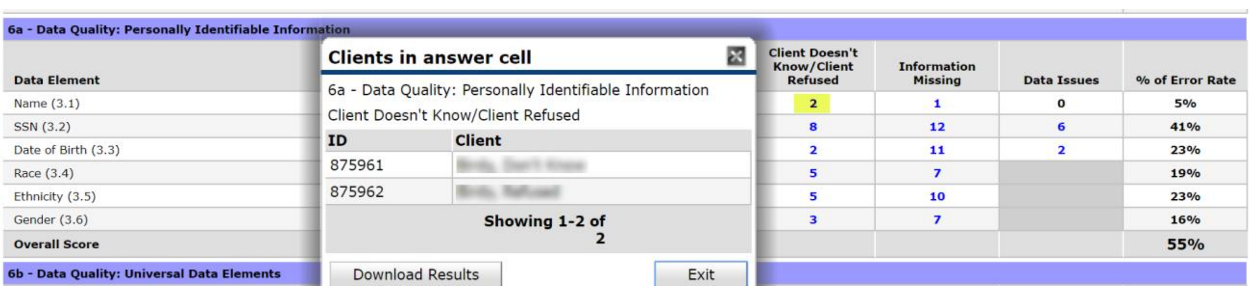
Location: A canned report you can find it under the Reports Tab→Provider Reports→CoC-APR



Required Prompts: Provider, Program Date Range, Entry/Exit Types (CoC projects are instructed to select HUD as the Entry/Exit type)



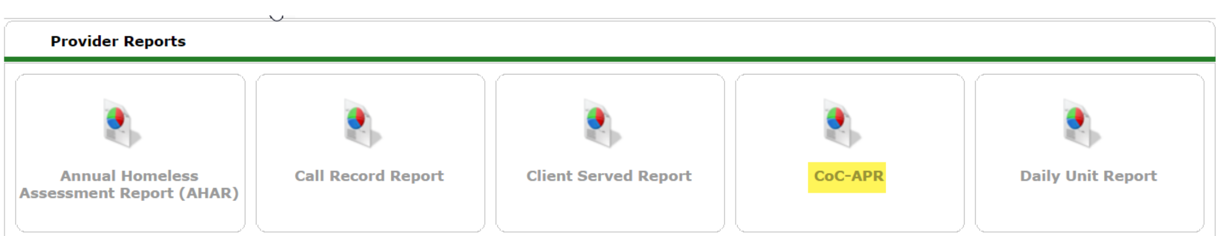
Data Quality Instructions: Sections 6a-6f of the APR are focused on data quality. To view client records flagged as containing an error, click on the blue number in the desired cell.



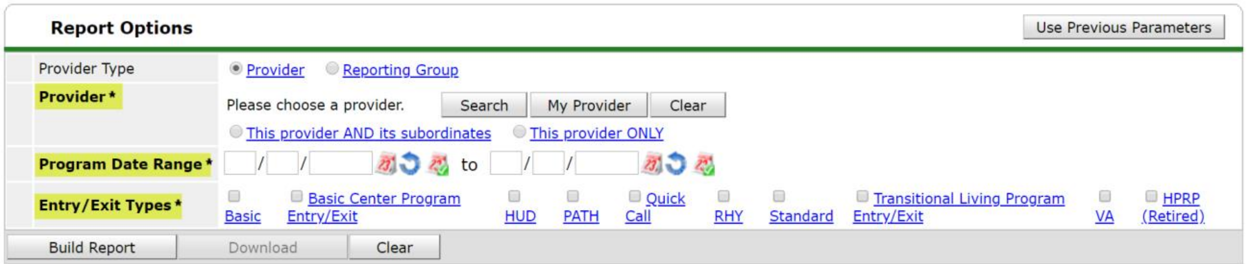
FUNDER-REQUIRED REPORTS

Name: CoC APR

Location: A canned report you can find it under the Reports Tab→Provider Reports→CoC-APR



Required Prompts: Provider, Program Date Range, Entry/Exit Types (CoC projects are instructed to select HUD as the Entry/Exit type)



Submission Frequency: Annually, based on your grant year (varies agency to agency)

Submission Instructions: CoC APR is uploaded into Sage