COORDINATED ENTRY WORKFLOW HMIS DATA ENTRY INSTRUCTIONS

CONTENTS

Please think before you print. Not every page of this guide is relevant to you. Please 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 for available housing. 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" (EDA) and select your **Coordinated Entry Assessment** provider.
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 (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" (EDA) and select your Coordinated Entry Assessment provider.
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. On the Entry/Exit tab, click on Add Entry/Exit.
5. You only need to add an Entry Record for the Head of Household. Do not need to include other household members in this Entry Record.
    a. **Provider** prompt should be filled in as your Coordinated Entry Assessment provider.

b. **Date** should match your system date which is in backdate to the assessment date.
c. **Entry Type**: Select 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.)

6. Click on Save & Continue.
7. In second pop-up, complete the Coordinated Entry Assessment for the Head of Household only. 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 a project provider (example: shelter) or has been served by a homeless service agency before, the client may already have data populate the assessment. If this is the case, review the data and confirm it is correct and reflects the status of the household upon "Entry" onto the Priority List (accurate for the day the household is being added to the Priority List). Update if it is not.
8. Click on Save & Exit.

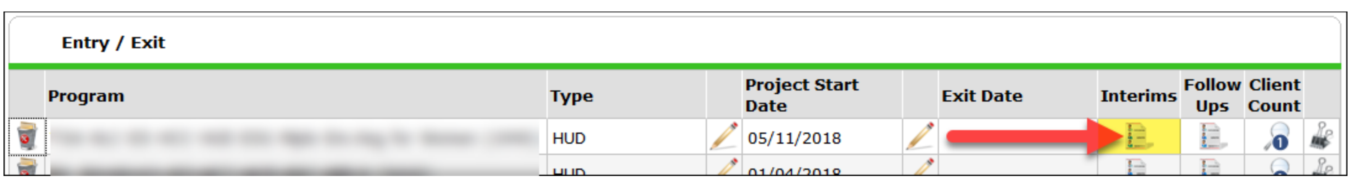
The client will now appear on Hennepin's Priority List Report. All you need for a client to appear on the Priority List is an Entry record into your agency's Coordinated Entry Assessment provider!

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" (EDA) and select your Coordinated Entry Assessment provider.
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. In the Entry/Exit tab, click on the Interims icon:

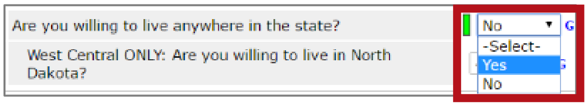


5. **Interim Review Type**: Update.
6. Update information on the Coordinated Entry Assessment on the Head of Household's record.
7. The updated data will be available for the Priority List Report following the next ART upload.

UPDATE TEXT BOXES OR DROP-DOWN MENUS

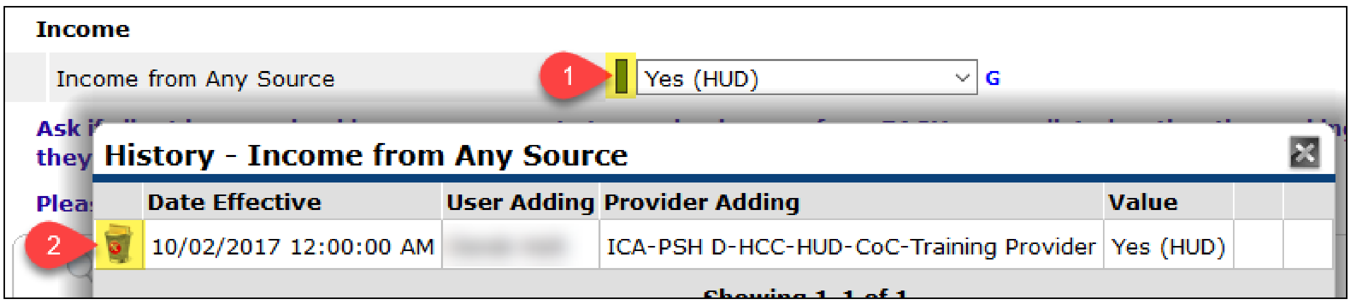
1. Simply overwrite the previous answer to update the response.

a. Drop-Down



b. Text Box

2. If the previous answer was entered in error, delete the incorrect answer by clicking on the History Bar, then selecting the trash can.

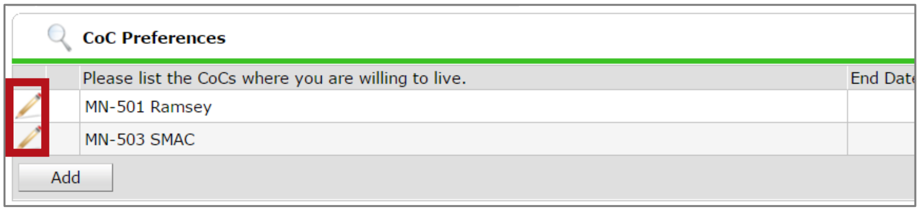


UPDATE SUB-ASSESSMENTS ON THE COORDINATED ENTRY ASSESSMENT

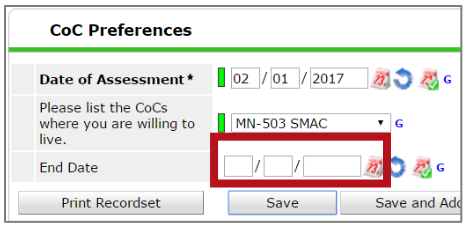
For some sub-assessments (tables throughout the assessment), it is important to "END" previous answers that are no longer accurate so that they do not appear on the Priority List Report. You do NOT, however, need to update all sub-assessments with an end date as some entries won't change.

Sub-assessments with responses you <u>DO NOT</u> need to "END"	Sub-assessments with responses you <u>DO</u> need to "END" (not all sub-assessments are available on all CES Assessments)
• 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

1. Click on the Edit Pencil for the line item you want to end.



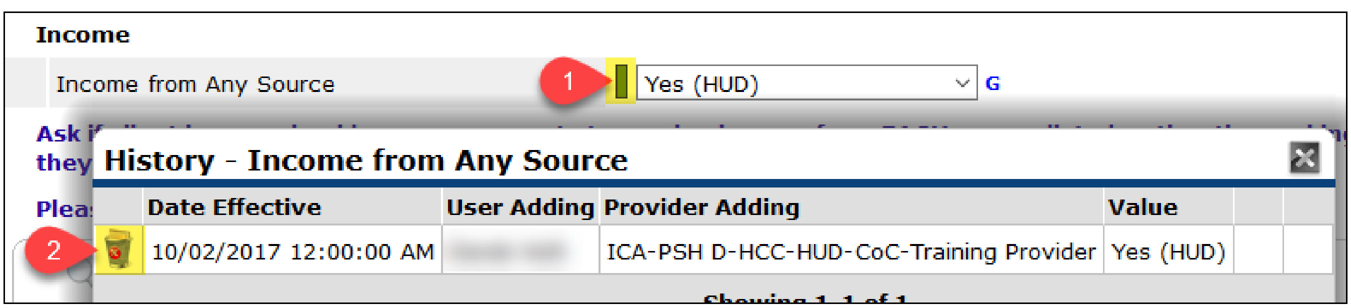
2. Add an End Date and click Save.



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 edit pencil next to the VI-SPDAT.
   a. If you entered some data in error, you'll want to add the correct answer and delete the previously entered wrong answer by clicking on the history bar.



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" (EDA) and select your Coordinated Entry Assessment provider.

2. Enter the Head of Household's record.
3. Do not backdate.
4. Click on the Entry/Exit tab.
5. In the Entry/Exit tab, add an End Date to the Entry/Exit record created by an assessor, "Coordinated Entry Assessment." The End Date removes the individual from the Priority List.
   - **Exit Date**: Today's date as that is the date you are removing the client from the Priority List
   - **Reason for Leaving:** Skip this question.
   - **Destination:** Select the appropriate destination.
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.

Note: If a person shows back up in the homeless response system (example: their new housing fell through), it is easy to add them back to the Priority List! Follow steps under the Place a Client onto the Priority List section 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

See previous section, CANCEL: Remove a Client from the Priority List, under Assessors Data Entry Steps in the previous section.

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.

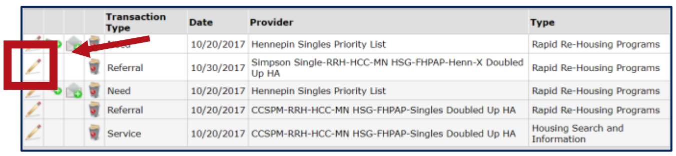
You must log into HMIS to see the client ID. Read "Appendix B: Add a Counts Report to your Home Page" to quickly access the client ID referred to your housing opening.

1. EDA to your project provider with a housing opening (the provider listed in the email).
2. Open the client's record.
3. Do not backdate. You will use today's date.
4. Click on the Service Transactions tab.

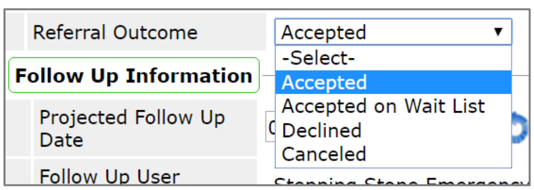
5. Click on “View Entire Service History” to bring you to the Entire Service History tab.

6. Click on the Edit Pencil to the left of the referral you want to accept. The Referral Provider will be named Hennepin Singles or Hennepin Families Priority List.

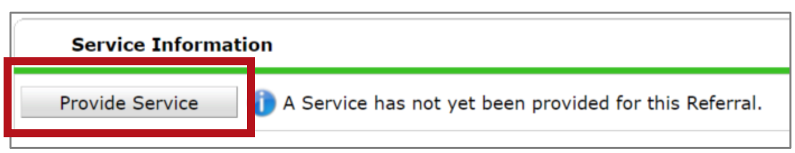
Pro Tip! If you are having trouble locating the specific referral in the Entire Service History tab, you can switch over to the Referrals tab. Click on more in the filters section, and select your provider from the list of “Referred-To Providers.” Or you can filter by date. Click on the Edit Pencil to the left of the applicable referral.



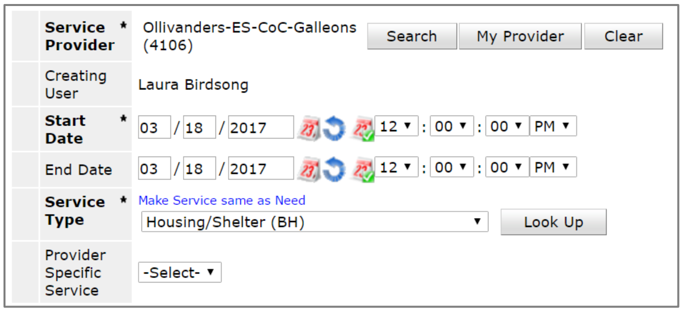
7. Change the referral outcome to Accepted.



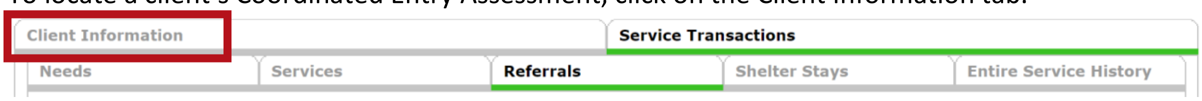
8. Click on Provide Service.



9. Service Provider should already be filled out as your project provider provisionally accepting the referral (as you are instructed to be in EDA mode to this provider). This matters for the Priority List report so that the Priority List knows which agency and project picked up the referral.
10. The End Date can be same as Start Date. Again, the Start Date and End Date will be today’s date.
11. Service Type: Housing Search and Information (if not available in the drop-down, you will need to use the Look Up feature. Contact mnhmis@icalliances.org and we can easily add the service type to your drop-down menu.
12. Skip Provider Specific Service.



13. Click on Save & Continue.
14. Upon clicking Save & Continue, a new screen will load with a lot of different sections to add content. You can skip everything.
15. Click on Save & Exit.
16. To locate a client's Coordinated Entry Assessment, click on the Client Information tab.



17. Click on the Assessments tab.
18. From the drop-down, search for Hennepin's Coordinated Entry Assessment (CES Assessment: Hennepin – Singles or CES Assessment: Hennepin – Families). Email mnhmis@icalliances.org if you do not see the CES Assessment.
19. Click on Submit. You can view the entire assessment, including contact information.

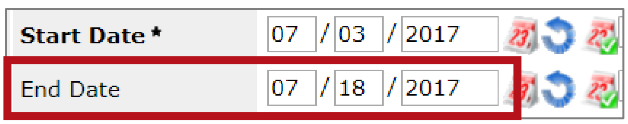
ENROLL A CLIENT IN YOUR HOUSING PROJECT

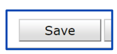
1. EDA to your project provider.
2. Backdate to the date the client enrolls in your program.
3. Enter client's record.
4. Click on the Entry/Exit tab.
5. In the Entry/Exit tab, add an End Date to the Entry/Exit record created by an assessor, "Coordinated Entry Assessment." The End Date removes the individual from the Priority List. (Note: We realize you are not in EDA to the Coordinated Entry Assessment provider to complete this step. That is OKAY for this step.)
    a. **Exit Date** for Coordinated Entry Assessment provider should be the SAME date the client is enrolling into your housing program.
    b. Reason for Leaving: Skip
    c. **Destination:** Select the appropriate destination that matches your housing project type.
6. Click on Save & Continue.
7. You do not need to answer any data elements in the CES Assessment: Hennepin Exit – Singles, or CES Assessment: Hennepin Exit - Families.
8. Click on Add Entry/Exit and continue data entry per usual.

DENY: DECLINE A REFERRAL AND RETURN CLIENT TO PRIORITY LIST

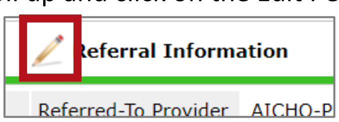
Unable to house a client? (Examples of why: Not eligible, no disabling condition, not HUD homeless, individual does not want to participate.) Complete these steps to return a client to the Priority List. If you determine that a client should no longer be on the Priority List for housing (see Hennepin 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. EDA to your project provider that the participant was originally referred to via HMIS.
2. Open the client’s record.
3. Do not backdate.
4. Click on the Service Transactions tab.
5. Click on “View Entire Service History” to bring you to the Entire Service History tab.
6. Click on the Edit Pencil to the left of the associated service you had added for Housing Search and Information.
7. Change the End Date of that service to today’s date. (This will allow us to report on the date you declined the referral. It is important to decline the referral in HMIS as soon as possible to alert your Priority List Manager(s) that you were unable to house the client so that the client can be considered for new housing opportunities.)

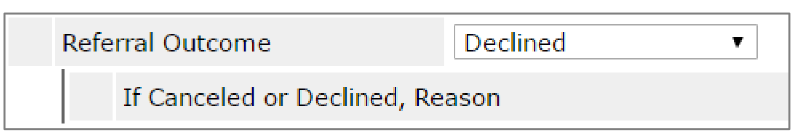


8. **Click on Save. (Easy to miss!)** 

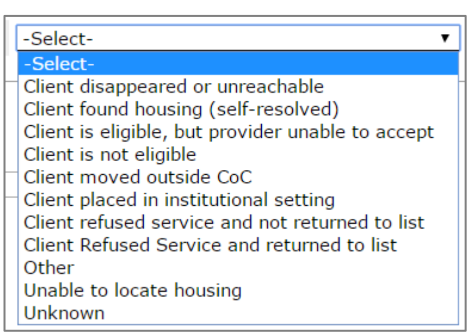
9. Scroll up and click on the Edit Pencil to the left of Referral.



10. Change the referral outcome to Declined.



11. Select the reason why the referral was declined.



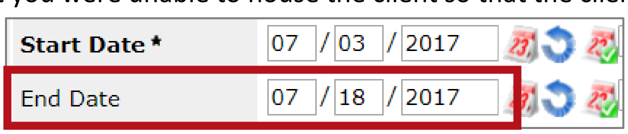
12. Click on Save & Exit.
13. It is important to now update the CES Date Tracking sub-assessment within the Coordinated Entry Assessment to easily communicate to the referral status.
14. Click on the Client Information tab.

15. Click on the Assessments tab.
16. From the drop-down, search for Hennepin's Coordinated Entry Assessment (CES Assessment: Hennepin – Singles or CES Assessment: Hennepin – Families). Email mnhmis@icalliances.org if you do not see the CES Assessment.
17. At the top of the assessment, complete the referral record within the HCC CES Housing Referral Tracking sub-assessment. Click on Save & Exit.
18. Click on Save.
19. 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), complete the steps starting at step 15 in the CANCEL: Decline a Referral and Remove a Client from the Priority List section.

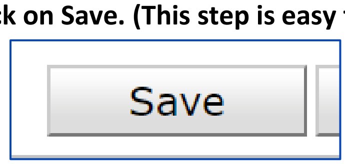
CANCEL: DECLINE A REFERRAL AND REMOVE CLIENT FROM THE PRIORITY LIST

If you determine that a client should no longer be on the Priority List for housing (see Hennepin County CES Policies and supplemental instruction document for reasons why a client should be removed), follow the steps below.

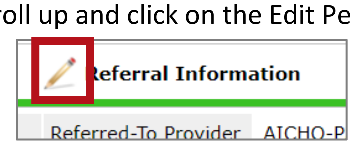
1. EDA to your project provider.
2. Open the client's record.
3. Do not backdate.
4. Click on the Service Transactions tab.
5. Click on "View Entire Service History" to bring you to the Entire Service History tab.
6. Click on the Edit Pencil to the left of the associated service you had added for Housing Search and Information.
7. Change the End Date of that service to today's date. (This will allow us to report on the date you declined the referral. It is important to decline the referral in HMIS as soon as possible to alert your Priority List Manager(s) that you were unable to house the client so that the client can be considered for new housing opportunities.)



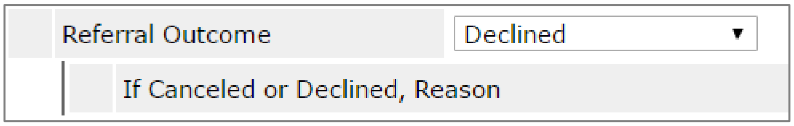
8. **Click on Save. (This step is easy to miss!)**



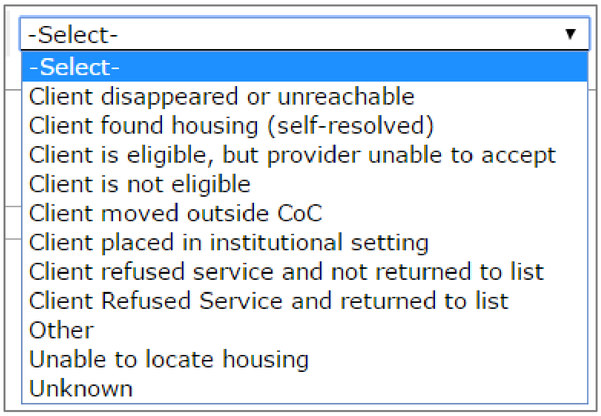
9. Scroll up and click on the Edit Pencil to the left of Referral.



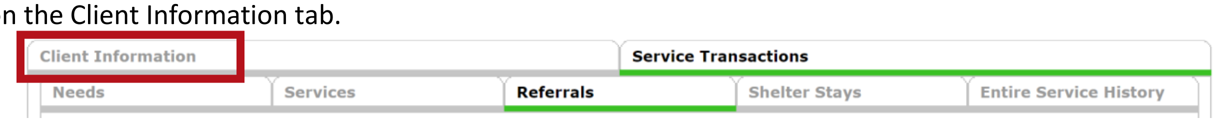
10. Change the referral outcome to Declined.



11. Select the reason why declined.



12. Click on Save & Exit.
13. Click on the Client Information tab.



14. Click on the Entry/Exit tab.
15. In the Entry/Exit tab, add an End Date to the Entry/Exit record created by an assessor, "Coordinated Entry Assessment." The End Date removes the individual from the Priority List. (Note: We realize you are not in EDA to the Coordinated Entry Assessment provider to complete this step. That is OKAY for this step.)
    - **Exit Date**: Today's date as that is the date you are removing the client from the Priority List
    - Reason for Leaving: Skip
    - **Destination:** Select the appropriate destination
16. Click on Save & Continue.
17. Update the referral record in the HCC CES Housing Referral Tracking sub-assessment under Section 3 in the Coordinated Entry Exit Assessment to document why the client is being removed from the list without being housed through Coordinated Entry.
18. 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.

- **Place a client onto the Priority List** = Create an Entry Record in the Entry Exit tab into a designated provider
- **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	B	Entry Date	C	Exit Date	D Interims
A	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)

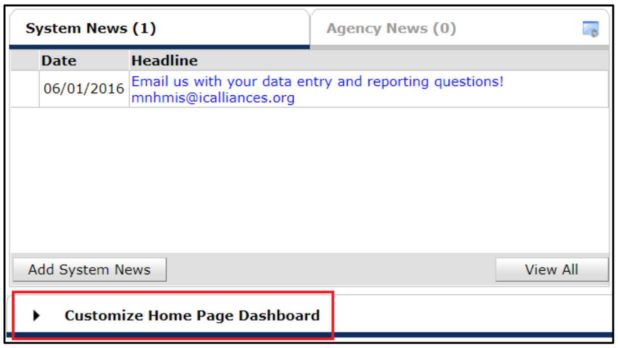
	Date Referral Made to Housing Provider *	Housing Provider Referred To	Housing Case Manager	Housing Case Manager Email	Housing Case Manager Phone	Referral Status Notes (Inlcude date of update. Do not include denial/cancellation information)	End Date: Record the date the referral was declined or cancelled
	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.

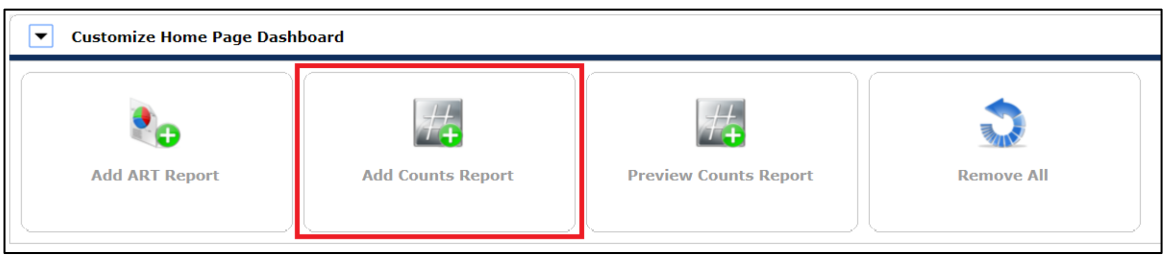
APPENDIX B: ADD A COUNTS REPORT TO YOUR HOME PAGE

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.

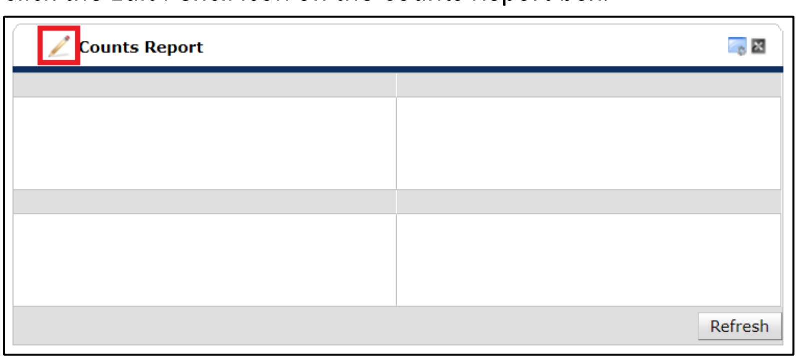
1. On the Home Page Dashboard, click on the **Customize Home Page Dashboard** at the bottom of the screen:



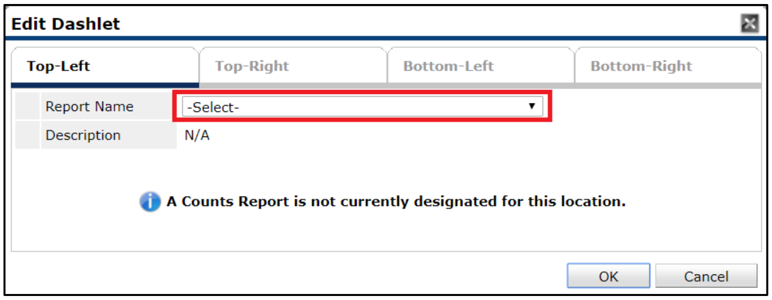
2. Click Add Counts Report.



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

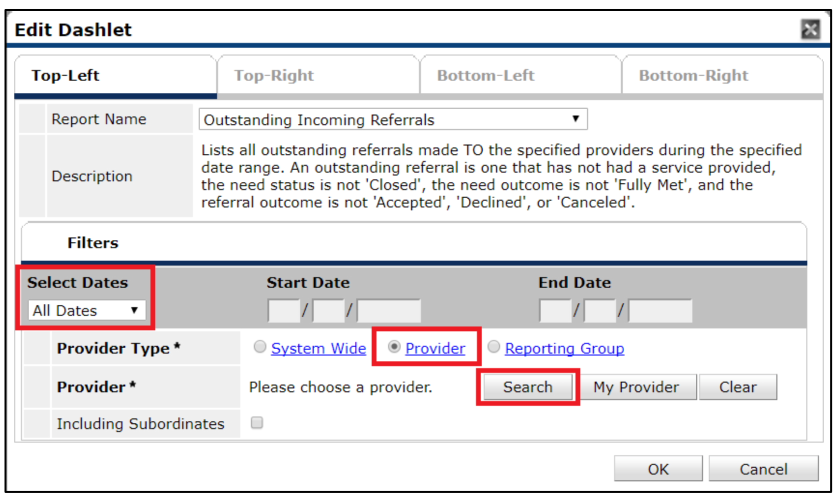


4. Select the Report Name you would like in the Top-Left box of the Counts Report

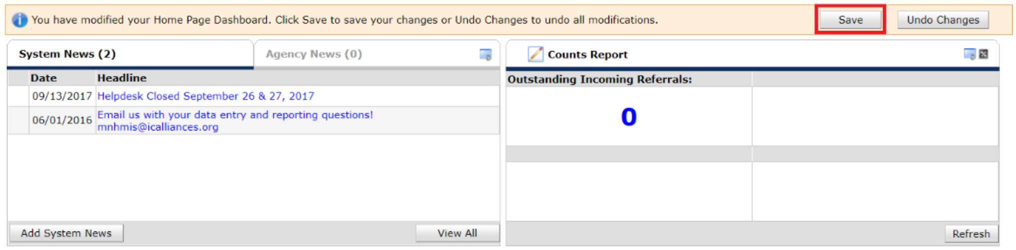


5. The Counts Report for users who will be accepting Coordinated Entry referrals from a Priority List Manager is **Outstanding Incoming Referrals.** This report lists all outstanding referrals made TO the specified providers during the specified date range. An outstanding referral is a referral that 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)

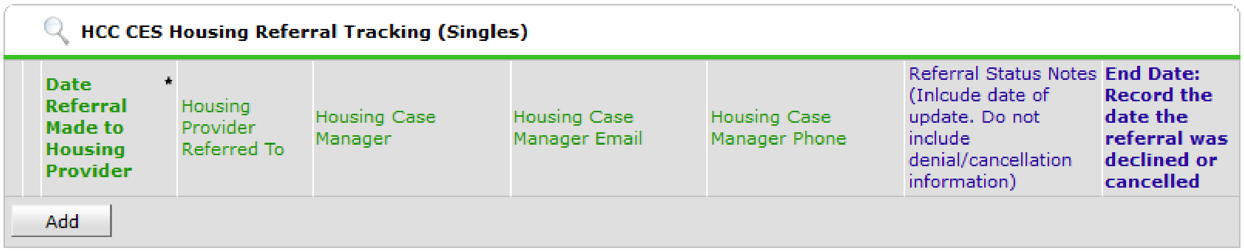
Date Referral Made to Housing Provider *	Housing Provider Referred To	Housing Case Manager	Housing Case Manager Email	Housing Case Manager Phone	Referral Status Notes (Inlcude date of update. Do not include denial/cancellation information)	**End Date: Record the date the referral was declined or cancelled**
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**

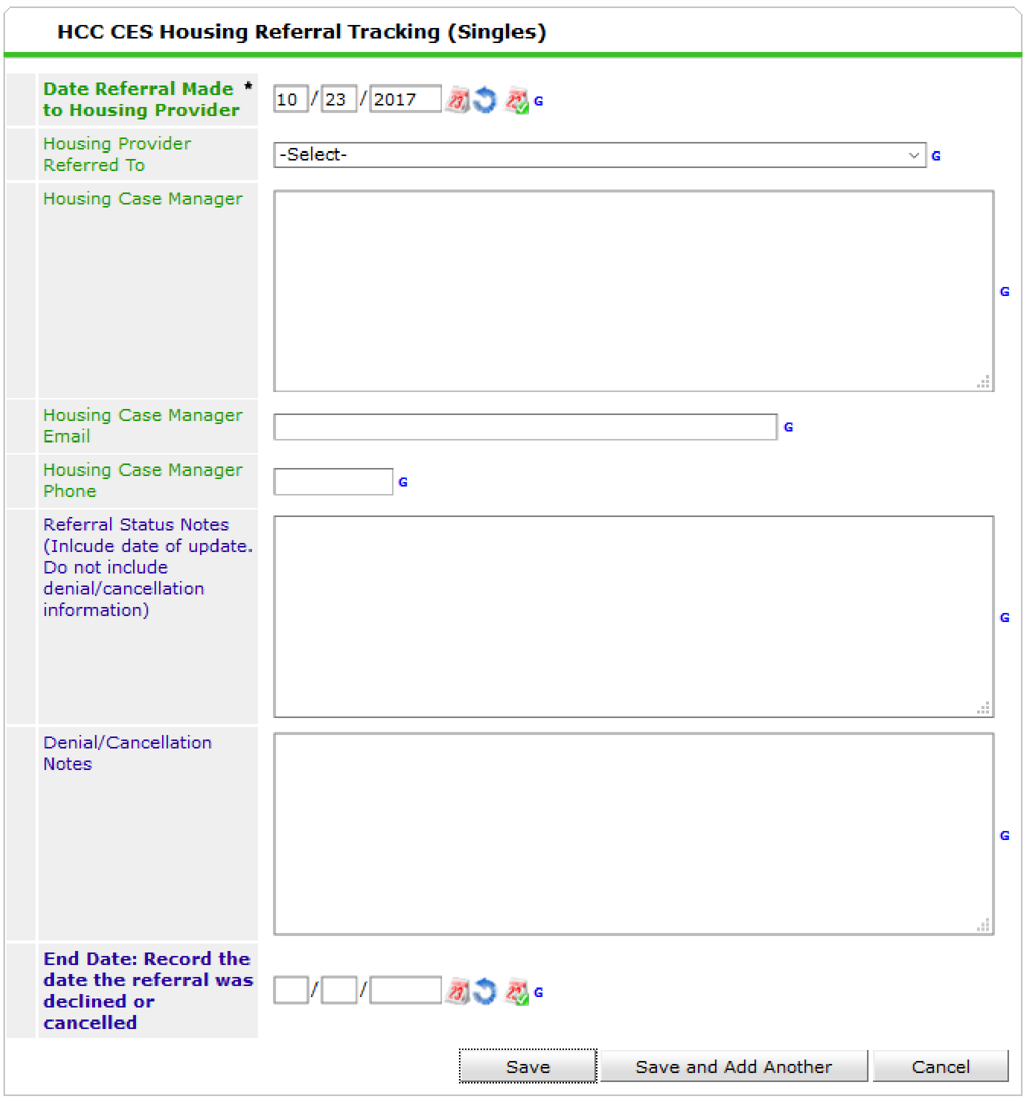
In the image above, the individual has a referral to Matrix Housing. This table tells you that this a current, active referral as there is no End Date recorded in the last column. The housing case manager at Ascension Place is provided so that you and the client know who to contact regarding this housing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

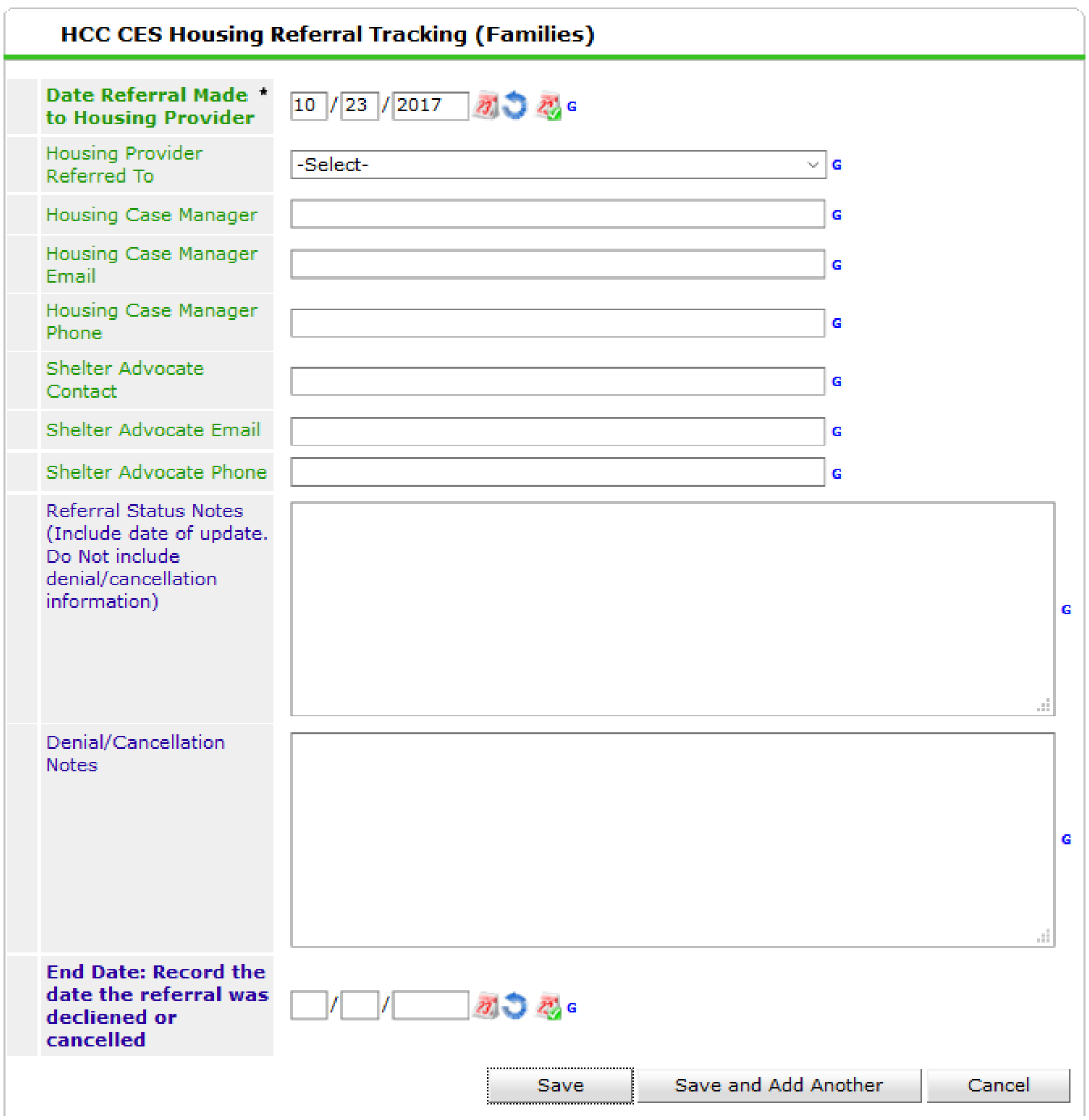
This is what the sub-assessment will look within the CES Assessment: Hennepin CoC – Families.

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