MINNESOTA COORDINATED ENTRY
ASSESSOR INSTRUCTIONS

This document contains data entry instructions for HMIS users that participate in Minnesota's Coordinated Entry Systems. Depending on the Continuum of Care (CoC), there may be supplemental instructions as well. Questions about entering Coordinated Entry data in HMIS can be directed to the Minnesota HMIS Helpdesk at mnhmis@icalliances.org.

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Institute for Community Alliances

ASSESSMENT

The Priority List is used to prioritize clients for placement in housing programs. Assessors are asked to accurately and completely fill out the Coordinated Entry assessment with clients so that the best possible referrals can be made by Priority List Managers.

ASSESS A CLIENT AND PLACE THEM ON THE PRIORITY LIST

Only clients who have completed an **HMIS Release of Information** and consented to share their information statewide can be added to a CoC's Priority List through HMIS. If a client does not wish to share their data statewide, contact your Priority List Manager to connect them with the non-HMIS Priority List. As a reminder, the term "client" refers to an individual experiencing homelessness, and they may also be a member of a household.

Checklist:

⊗ Find existing records for the client(s) being assessed and create new records if needed.

⊗ Place client(s) on the Priority List by creating a new Entry/Exit for the Coordinated Entry Assessment provider.

⊗ Fill out the Coordinated Entry assessment as accurately and completely as possible.

FIND OR CREATE A CLIENT RECORD IN HMIS

1. Click on **Enter Data As** and select your Coordinated Entry Assessment provider.

2. Open **ClientPoint** and search for the individual or head of household being assessed.

    a. If a client appears in the search results, verify that the record is shared before clicking on the client's name: the word SHARED should be displayed in the Alias field.

Client Results

	ID	Name ▲	Social Security Number	Date of Birth	Alias
✎	1103613			06/14/1985	SHARED
✎	1042881			08/04/1997	SHARED
✎	1015945			09/19/1991	SHARED
✎	178177			05/05/1955	
✎	1043993			08/11/2015	SHARED

*Client records with six-digit IDs are never shared records. Some records with seven-digit IDs may also not be shared, depending on the client's preferences.

      b. If there are no matching results, fill in as many of the search fields as possible before clicking on **Add New Client With This Information**.

3. When prompted, enter the date of assessment into the Back Date Mode pop-up and click on **Set New Back Date**.

      a. If doing same-day data entry, select **Use Current System Date**.

Setting a new back date will temporarily change the system date. Any information entered will be time-stamped with that modified system date.

4. Select the Client Profile tab and check that the Client Record section is not missing information.

a. If you created the client record, enter the **Date of ROI Consent** and type **SHARED** in the Alias field. Fill out the Universal Profile as completely and accurately as possible.

> **It is the responsibility of the agency with the first signed ROI to enter the date signed below. Do not override.**
>
> | Date of ROI Consent | ___ / ___ / _____ |

The agency that creates a client record is responsible for entering a Date of ROI Consent for clients that agree to information sharing.

5. [**Households Only**] Select the Households tab and look for a household that has the correct members included.

a. If there is no household with the correct composition, create a new one that includes everyone the head of household indicates will be living with them. **Do not** remove or delete members from an existing household!

> **(226912) Other**
>
> | Name | Age | Head of Household | |
> |---|---|---|---|
> | (1060073) _____ _____ | 61 | Yes | |
> | (1068769) _____ _____ | 57 | No | |
>
> Manage Household
>
> ▶ **Previous Households**
>
> Search Existing Households   **Start New Household**

b. When creating a new household, you may need to create additional client records for other household members as well. For more information about creating client records and managing households, refer to the Forms & Instructions page of the MN HMIS website (https://hmismn.org/forms-and-instructions/) or contact the Helpdesk at mnhmis@icalliances.org.

PLACE A CLIENT ON THE PRIORITY LIST

1. Click on **Enter Data As** and select your Coordinated Entry Assessment provider.

2. Open the client record of the individual or head of household being added to the Priority List. When the Back Date Mode pop-up appears, select **Use Current System Date**.

3. Click on the **Entry/Exit** tab, then select **Add Entry/Exit**.

4. Select the following options in the Project Start Data pop-up:

   a. Household Members: Check the box next to the name of every household member identified by the head of household at the time of assessment.

   b. Provider: Your Coordinated Entry Assessment provider.

   c. Type: Select **Basic**.

   d. Project Start Date: The date the client was assessed.

5. Click on **Save & Continue** to proceed to the Coordinated Entry assessment.

FILL OUT A COORDINATED ENTRY ASSESSMENT

1. Fill out the assessment as accurately and completely as possible, paying special attention to the following:

CES RELEASE OF INFORMATION DATE [HENNEPIN ONLY]

All clients participating in Hennepin County's Coordinated Entry System must sign the Hennepin CES Release of Information (ROI). Enter the date this ROI was signed into the *CES Release of Information Date* field. A copy of the Hennepin ROI should either be uploaded to the client's record in HMIS or stored at the assessor's agency.

*Note that the CES ROI is **different** than the HMIS ROI. The HMIS ROI asks a client whether they consent to have their information shared statewide.*

HOUSEHOLDS

Complete an assessment for the head of household **only**.

COORDINATED ENTRY ASSESSMENT SUB-ASSESSMENT

This data element is used to track details about a Coordinated Entry assessment. It should be updated each time there is a new assessment.

a. Click on the **magnifying glass** to open the sub-assessment pop-up.

   i. If there is an old row without an End Date, click on that row's **edit pencil**, in the Edit Recordset pop-up, enter an End Date that is **one day prior** to the client's assessment date, then select **Save**.

b. Click on **Add** and fill out the following fields:

   i. Date of Assessment: Enter the date of the client's assessment.

   ii. Assessment Location: Enter the location where the assessment was completed.

   iii. Assessor Name, Phone, Etc.: Enter your information.

iv. Assessment Type: Select the most accurate option.

v. Assessment Level: Select **Housing Needs Assessment**.

vi. Prioritization Status: Select **Placed on Prioritization List**. <u>Do not</u> choose the other option or the client <u>will not</u> appear on the priority list.

CURRENT LIVING SITUATION SUB-ASSESSMENT

This data element captures contact between an individual or household and a service provider, as well as details about their living situation at the time of the interaction.

a. Click on the **magnifying glass** to open the sub-assessment pop-up.

i. If there is an old row without an End Date, click on that row's **edit pencil**. In the Edit Recordset pop-up, enter an End Date that is one day prior to the client's assessment date, then select **Save**.

b. Click on **Add** and fill out the following fields:

i. Start Date: Enter the date of the client's assessment.

ii. Information Date: Same as the Start Date.

iii. Location Details: [Optional] Enter more detail about the client's location.

iv. Current Living Situation: Select the most accurate option.

      v.   Living Situation verified by: Click on **Lookup**, then select your Coordinated Entry Assessment provider.

     vi.   Conditional Questions: Depending on the answer selected for Current Living Situation, you may need to answer additional questions.

Read the green helper text carefully to decide if additional questions need to be answered.

PRIORITIZATION TOOL (VI-SPDAT)

In some CoCs, a VI-SPDAT score is used to determine what type of intervention best meets a client's needs.

    a.   Find the VI-SPDAT sub-assessment that should be used for your client – VI-SPDAT, TAY-VI-SPDAT, or VI-FSPDAT – and click on the **Add** button.

    b.   Complete the entire assessment, then click on **Save** to generate a score.

c.   Check the VI-SPDAT Override/Backlog Entry sub-assessment and verify that there are no active override scores (scores without an End Date). If the client does have an active Override score, click on that older score's **edit pencil** and enter an End Date. This date should be one day prior to your new score's Start Date.

EXISTING ASSESSMENT DATA

If the client has worked with other homeless service agencies before, data may already appear in the assessment. Review any existing assessment data and update information that is no longer accurate.

2.   Select **Save & Exit** at the bottom of the assessment when you are finished entering data.

UPDATE A CLIENT'S ASSESSMENT WITH NEW INFORMATION

When new information about a client becomes known, such as a change in their Current Living Situation, the Coordinated Entry assessment should be updated. As a reminder, the term "client" refers to an individual experiencing homelessness; that individual may be a member of a household.

Checklist:

☑ Add an interim update to the Coordinated Entry Assessment Entry/Exit.

☑ Update the interim assessment with new information.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1.   Click on **Enter Data As** and select your Coordinated Entry Assessment provider.

2.   Open the client record of the individual or head of household whose information is being updated. When the Back Date Mode pop-up appears, select **Use Current System Date**.

3.   Click on the **Entry/Exit** tab and find the Entry/Exit row for the Coordinated Entry Assessment provider.

4. Select the **Interims** icon, then click on **Add Interim Review** in the Interim Reviews pop-up.

5. Select the following options in the Add Interim Review pop-up:

    a. Household Members: Check the box next to the name of every household member attached to the entry.

    b. Interim Review Type: Select **Update**.

    c. Review Date: The date the new information was reported.

6. Click on **Save & Continue** to proceed to the interim assessment.

UPDATE AN INTERIM ASSESSMENT

1. Update the assessment where necessary, paying special attention to the following:

    HOUSEHOLDS

    Update the assessment for the head of household **only**.

CURRENT LIVING SITUATION SUB-ASSESSMENT

This data element captures contact between an individual or household and a service provider, as well as details about their living situation at the time of the interaction.

a. Click on the **magnifying glass** to open the sub-assessment pop-up.

    i. If there is an old row without an End Date, click on that row's **edit pencil**. In the Edit Recordset pop-up, enter an End Date that is **one day prior** to the client's assessment date, then select **Save**.

b. Click on **Add** and fill out the following fields:

    i. Start Date: Enter the date that new information was reported.

    ii. Information Date: Same as the Start Date.

    iii. Location Details: [Optional] Enter more detail about the client's location.

    iv. Current Living Situation: Select the most accurate option.

    v. Living Situation verified by: Click on **Lookup**, then select your Coordinated Entry Assessment provider.

vi. Conditional Questions: Depending on the answer selected for Current Living Situation, you may need to answer additional questions.

Read the green helper text carefully to decide if additional questions need to be answered.

VI-SPDAT – CORRECT A SCORING ERROR

a. Find the score that was entered incorrectly and click on its **edit pencil**.

b. Update any inaccurate answers, but do not change the Start Date. When you are finished making updates, click on **Calculate** to see how the score has changed.

c. Select **Save** to close the Edit Recordset pop-up.

VI-SPDAT – ENTER AN OVERRIDE SCORE

a. Find the VI-SPDAT Override/Backlog Entry sub-assessment.

i. If the client already had an override score, click on that older score's **edit pencil** and enter an End Date. This date should be **one day prior** to the new score's Date of Assessment.

b. Click on the **Add** button and complete the following fields:

  i. Date of Assessment: Today's date.

  ii. VI-SPDAT Type: Select the score type that matches the client's situation.

  iii. Score: Select the client's override score number.

  iv. Override or Backlog?: Choose **Override**.

  v. Notes: [Optional] Add notes about the Override score.

c. Click on **Save** when you are finished.

EXISTING ASSESSMENT DATA

If the client has worked with other homeless service agencies before, data may already appear in the assessment. Review any existing assessment data and update information that is no longer accurate.

2. Select **Save & Exit** at the bottom of the assessment when you are finished entering data.

UPDATE A HOUSEHOLD'S COMPOSITION

When someone **other than** the head of household leaves a household, it is important to update the household's composition. If the head of household is leaving, skip to the section Remove a Client from the Priority List for instructions on removing *all* household members from the Priority List.

Checklist:

  ✓ Add a client to the Coordinated Entry Assessment Entry/Exit or remove them from it.

  ✓ Add an interim update to the Entry/Exit.

  ✓ Update the household size in the interim assessment.

ADD OR REMOVE A CLIENT FROM AN ENTRY/EXIT

ADD A CLIENT TO AN ENTRY/EXIT

Before proceeding, make sure that the person being added to the Entry/Exit already has a client record in HMIS. If they do not, refer to the section Find or Create a Client Record in HMIS for instructions on creating a new client record.

1. Click on **Enter Data As** and select your Coordinated Entry Assessment provider.

2. Open the client record of the head of household. When the Back Date Mode pop-up appears, select **Use Current System Date**.

3. Select the Households tab and find the household that includes all the same members attached to the Coordinated Entry assessment Entry/Exit. If that household does not include the person being added to the Entry/Exit, do the following:

    a. Click on **Manage Household** to open the Household Information pop-up.

    b. Select **Add/Delete Household Members**, then click on the **arrow** next to Add Clients to the Household in the nest pop-up.

    c. Search for the client being added to the household. When they appear in the Client Results table, click on the **green circle** to select them, then click on **Continue**.

d. In the Household Members table, update the following fields:

    i. Relationship to Head of Household: Select the most accurate option.

    ii. Joined Household: Enter the date that the client joined the household.

Household Members

Name	Age	Head of Household	Relationship to Head of Household	Joined Household *
(1001244)	30	Yes ▼	Self ▼	10 / 13 / 2016
(1023540)		No ▼	-Select- ▼	03 / 13 / 2020
(1002351)	5	No ▼	Daughter ▼	10 / 13 / 2016
(1001245)	50	No ▼	Significant other ▼	10 / 13 / 2016

Add/Delete Household Members

e. If necessary, the **Household Type** field can be updated at this time.

f. Click on **Save & Exit** to close the Household Information pop-up.

4. Click on the **Entry/Exit** tab and find the Entry/Exit row for the Coordinated Entry Assessment provider.

5. Select the **edit pencil** next to the Project Start Date.

Entry / Exit

	Program	Type	Project Start Date	Exit Date
🗑	ICA-Coordinated Entry Assessment-Training Provider (1353)	Basic ➡ ✏	01/01/2020	✏

Add Entry / Exit   Showing 1-1 of 1

6. Click on **Save & Continue** in the Edit Project Start Data pop-up to open the entry assessment.

7. Select **Include Additional Household Members** from the household members table at the top of the entry assessment.

Household Members Associated with this Entry / Exit

		Name	Head of Household		Project Start Date	
🔒	👤	(1001244)	Yes	✏	01/01/2020	✏
🔒	👤	(1002351)	No	✏	01/01/2020	✏
🔒	👤	(1001245)	No	✏	01/01/2020	✏

Include Additional Household Members ⬅   Show

8. Check the box next to the client being added to the Entry/Exit and enter the date they joined the household in the Project Start Date field.

9. Click on **Save & Continue** to close the Edit Project Start Data pop-up, then close the entry assessment.

REMOVE A CLIENT FROM AN ENTRY/EXIT

Refer to the section <u>Remove a Client from the Priority List</u> for step-by-step instructions on removing a household member from the assessment Entry/Exit.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your Coordinated Entry Assessment provider.

2. Open the client record of the individual or head of household whose information is being updated. When the Back Date Mode pop-up appears, select **Use Current System Date**.

3. Click on the **Entry/Exit** tab and find the Entry/Exit row for the Coordinated Entry Assessment provider.

4. Select the **Interims** icon, then click on **Add Interim Review** in the Interim Reviews pop-up.

5. Select the following options in the Add Interim Review pop-up:

    a. Household Members: Check the box next to the name of every household member attached to the entry.

    b. Interim Review Type: Select **Update**.

    c. Review Date: The date the new information was reported.

Household Members

☐ **(234162) Two Parent Family**

    ☑ (1001244)
    ☑ (1002351)
    ☑ (1001245)

Interim Review Data

Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update ▼
Review Date *	___ / ___ / ____ 📅🔄📅 ▼ : ▼ : ▼ ▼

6. Click on **Save & Continue** to proceed to the interim assessment.

UPDATE A HOUSEHOLD SIZE

1. In the interim assessment, scroll down to the Household Size questions.

2. Make updates where necessary to accurately show how many household members are seeking a housing placement through Coordinated Entry.

Household Size: Total # of Persons	▌ ☐	G
Household Size: Total # of Adults (18+)	▌ ☐	G
Household Size: Total # of Children (17 and under)	▌ ☐	G
Family Type	▌ -Select- ▼	G

This Household Size question series is what determines how many household members are counted on the Priority List report!

3. When you are finished making updates, scroll down to the bottom of the assessment and click on **Save & Exit**.

REMOVE A CLIENT FROM THE PRIORITY LIST

In certain circumstances, a client may be removed from the Priority List because they are no longer considered to be eligible for a placement in homeless-dedicated housing. As a reminder, the term "client" refers to an individual experiencing homelessness, and that individual may be the member of a household.

Checklist:

◉ Add exit data to the Coordinated Entry Assessment Entry/Exit.

◉ Fill out the exit assessment as completely and accurately as possible.

ADD EXIT DATA

1. Click on **Enter Data As** and select your Coordinated Entry Assessment provider.

2. Open the record of the client being removed from the Priority List. When the Back Date Mode pop-up appears, select **Use Current System Date**.

3. Click on the **Entry/Exit** tab and find the Entry/Exit row for the Coordinated Entry Assessment provider.

4. Select the **edit pencil** next to the empty Exit Date field.

5. Fill out the following fields in the Edit Exit Data pop-up:

   a. Household Members: Check the box next to the name of every household member who will be leaving the Priority List. If the head of household is being removed from the priority list, then **all** boxes should be checked.

   b. Exit Date: The date that the client is being removed from the Priority List.

   c. Destination: Select the most accurate answer.

6. Click on **Save & Continue** to proceed to the exit assessment.

FILL OUT AN EXIT ASSESSMENT

1. Fill out the assessment as accurately and completely as possible, paying special attention to the following:

HOUSEHOLDS

Update the assessment for the head of household **only**. If another member is being removed from the household, **do not** fill out the exit assessment.

EXISTING ASSESSMENT DATA

If the client has worked with other homeless service agencies before, data may already appear in the assessment. Review any existing assessment data and update information that is no longer accurate.

2. Select **Save & Exit** at the bottom of the assessment when you are finished entering data.