MINNESOTA COORDINATED ENTRY
HOUSING PROVIDER 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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Last Updated on 4/6/2020

Institute for Community Alliances

REFERRAL

When a housing vacancy has been reported to a CoC's Priority List Manager (PLM), the PLM uses a priority list report to determine who to refer to fill that vacancy. HMIS enables PLMs and housing providers to then communicate about the status of a referral.

ACKNOWLEDGE A HOUSING REFERRAL

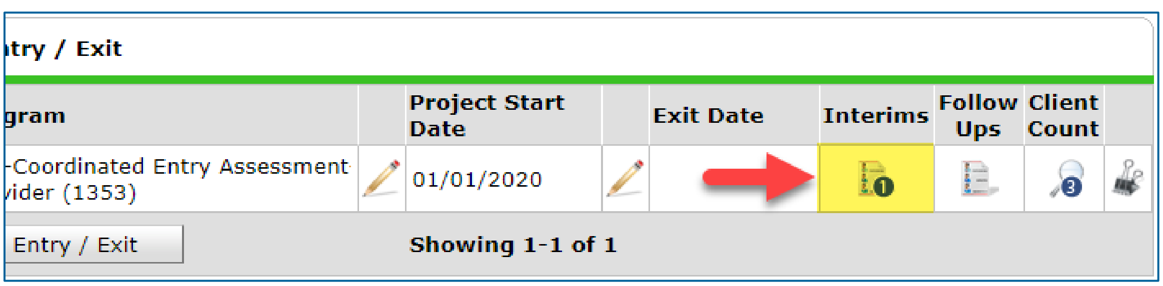
When a housing provider learns that they have a pending housing referral, it is important for them to let the Priority List Manager know they have received the referral. In the past, this step has been called "provisional acceptance." As a reminder, the term "client" refers to an individual experiencing homelessness, and that individual may be the member of a household.

Checklist:

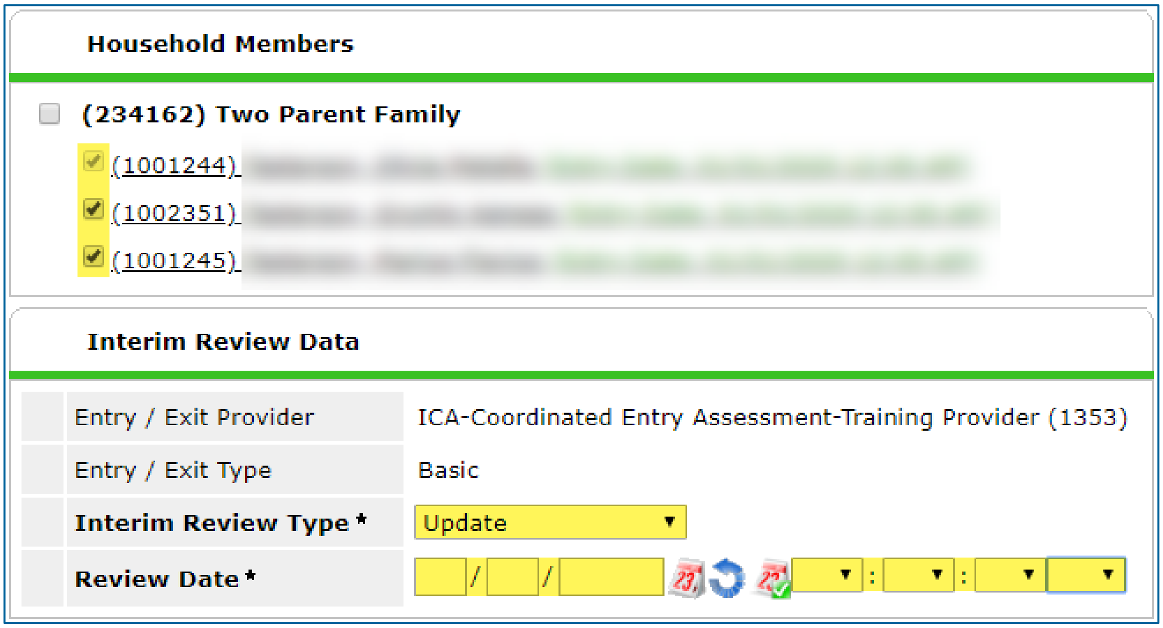
- ✅ Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- ✅ Update the client's referral in the Coordinated Entry Event sub-assessment.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program's 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.



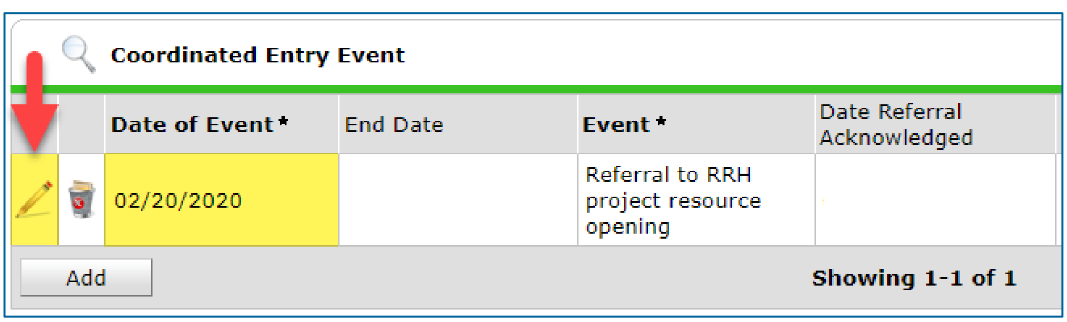
5. Select the following options in the Add Interim Review pop-up:
    a. Household Members: Check the box next to the name of every household member attached to the entry.
    b. Interim Review Type: Select **Update**.
    c. Review Date: The date you learned of the housing referral.



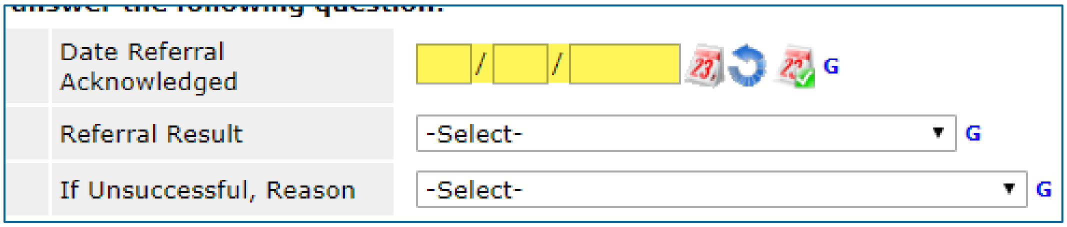
6. Click on **Save & Continue** to proceed to the interim assessment.

UPDATE A CLIENT'S HOUSING REFERRAL

1. In the interim assessment, scroll down to the Coordinated Entry Event sub-assessment.
    a. Click on the **magnifying glass** to open the sub-assessment pop-up.
    b. Find the row whose Date of Event matches your referral's date, then click on that row's **edit pencil**.



c. Set the Date Referral Acknowledged as the date you learned of the housing referral.



2. Click on **Save** when you are finished making updates.
3. Scroll down to the bottom of the assessment and select **Exit** to close it.

MARK A REFERRAL AS SUCCESSFUL

When a client is being enrolled in a housing program, their referral should be marked as "successful."

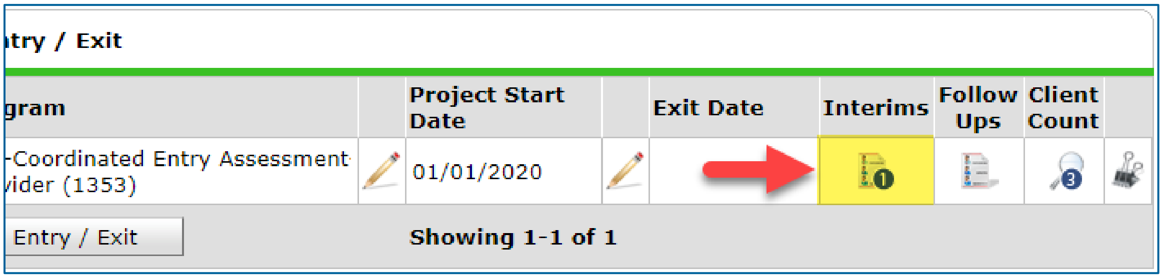
Checklist:

- ☑ Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- ☑ Update the client's referral in the Coordinated Entry Event sub-assessment.
- ☑ Add a new row to the Current Living Situation sub-assessment.
- ☑ Enroll the client in your housing program by creating a new Entry/Exit for your housing provider.
- ☑ Fill out an entry assessment for the client.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program's 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.

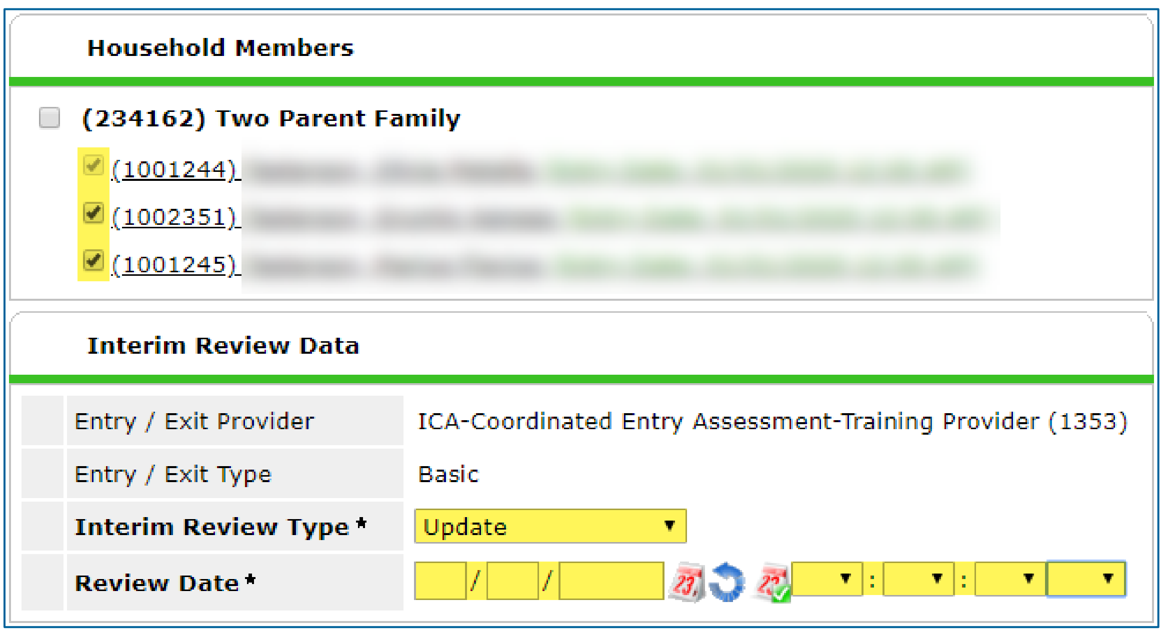


5. Select the following options in the Add Interim Review pop-up:

   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 referral was successful.



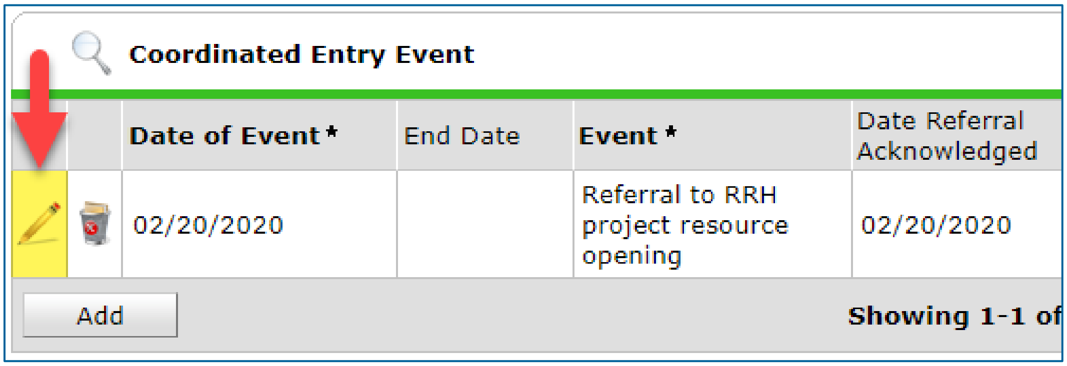
6. Click on **Save & Continue** to proceed to the interim assessment.

UPDATE A CLIENT'S HOUSING REFERRAL

1. In the interim assessment, scroll down to the Coordinated Entry Event sub-assessment.

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

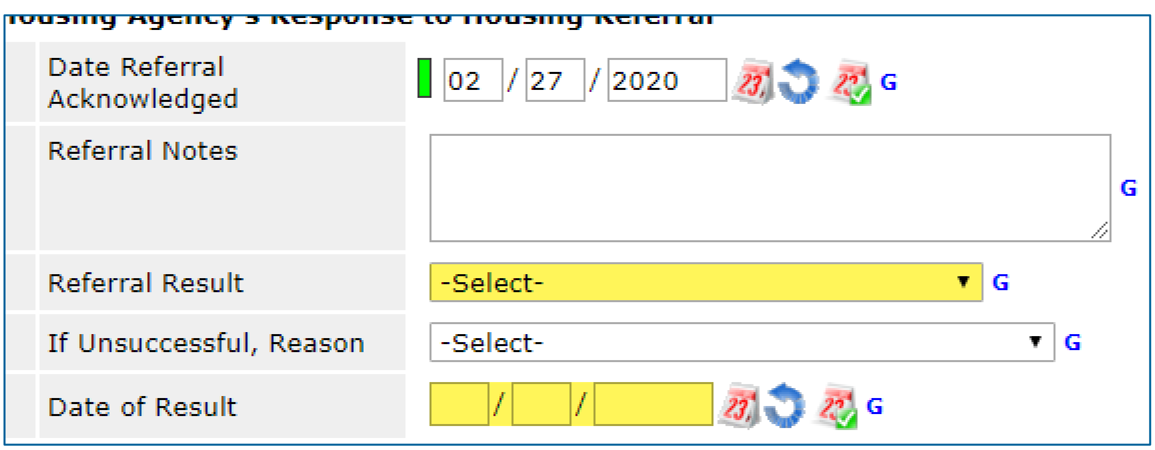
3. Find your referral's row and click on the **edit pencil**.



4. In the event pop-up, fill out the following:

   a. Referral Result: Select **Successful referral: client accepted**.

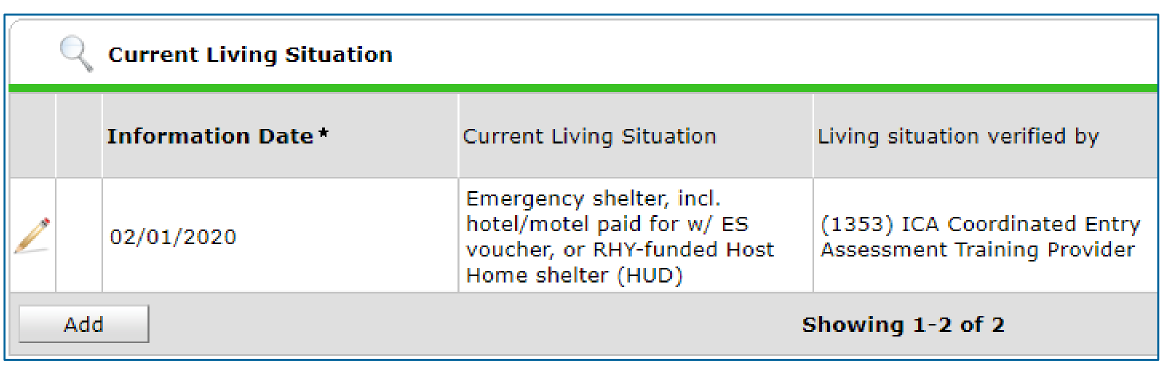
   b. Date of Result: Enter the date the referral was successful.



5. Click on **Save** when you are done updating the referral.

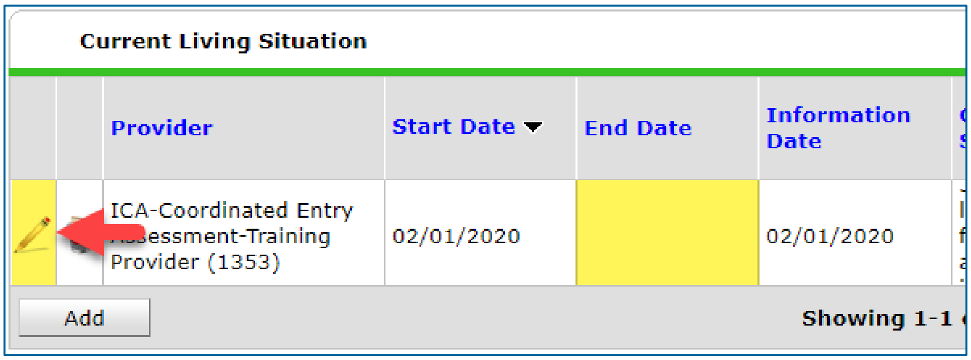
UPDATE A CLIENT'S CURRENT LIVING SITUATION

1. In the interim assessment, scroll down to the Current Living Situation sub-assessment.



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

b. 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 before** the referral was successful, then select **Save**.



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

   a. Start Date: Enter the date the referral was successful.

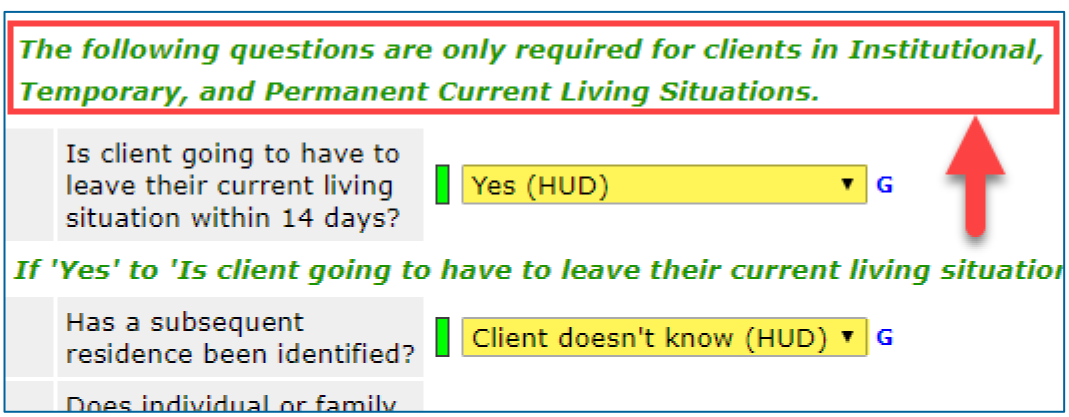
   b. Information Date: Same as the Start Date.

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

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

   e. Living Situation verified by: Click on **Lookup**, then select your housing program's provider.

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



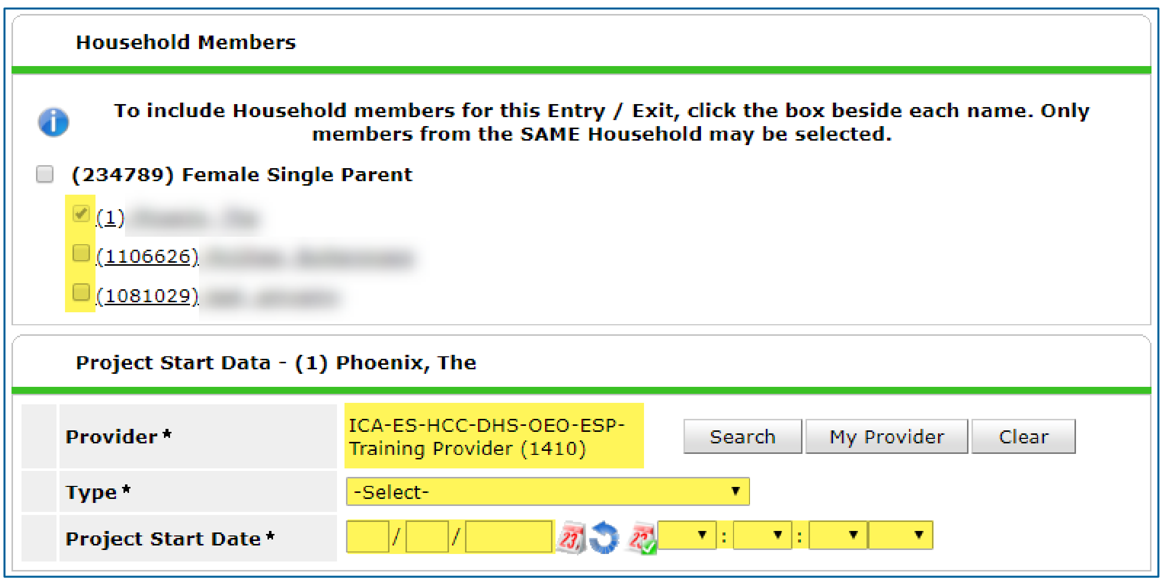
**Read the green helper text carefully to decide if additional questions need to be answered.*

3. Click on **Save** when you are done recording the Current Living Situation.

4. Scroll to the bottom of the interim assessment and select **Exit** to close it.

ENROLL A CLIENT IN A HOUSING PROGRAM

1. Click on **Enter Data As** and select your housing program's provider.
2. Open the client record of the individual or head of household being enrolled in your housing program. 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 who will be attached to the entry.
   b. Provider: Your housing provider.
   c. Type: Select your provider's entry type.
   d. Project Start Date: The date the client was enrolled in your housing program.



5. Click on **Save & Continue** to proceed to your housing program's entry assessment.

FILL OUT AN ENTRY ASSESSMENT

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

HOUSEHOLDS

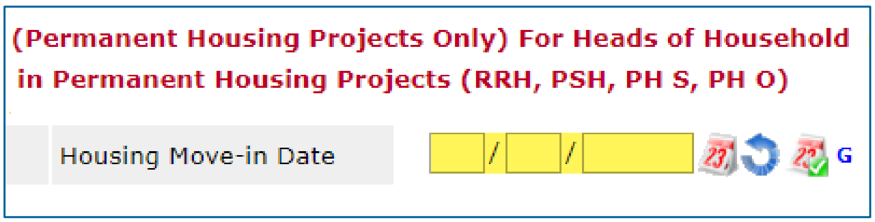
Complete the entry assessment for **all** members of the household.

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.

HOUSING MOVE-IN DATE

If the client moved into housing on the same day that they were enrolled in your housing program, record a Housing Move-In Date. Then, refer to the section Remove a Client from the Priority List for instructions on removing the housed client from the Priority List.



2. Scroll down to the bottom of the assessment and select **Save & Exit** when you are finished entering data.

MARK A REFERRAL AS UNSUCCESSFUL

When a housing provider or client rejects a referral, the referral should be marked as "unsuccessful." In many cases, the client should be returned to the Priority List when a referral is unsuccessful. However, if a housing provider knows that the client should not be considered for future housing placements, they should remove the client from the Priority List. See the section Remove a Client from the Priority List for instructions.

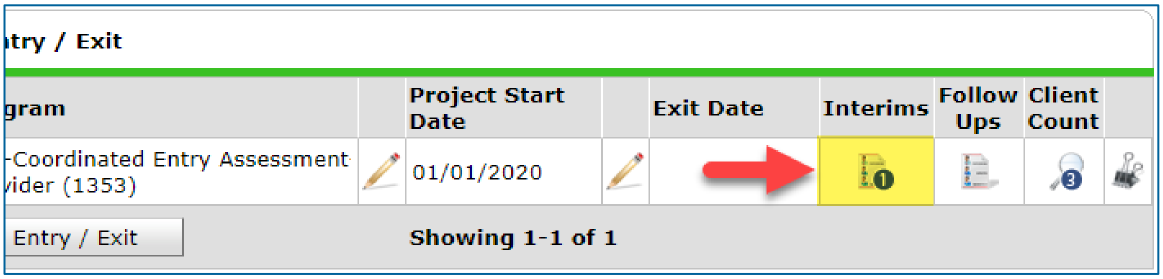
Checklist:

- ✓ Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- ✓ Update the client's referral in the Coordinated Entry Event sub-assessment.
- ✓ Add a new row to the Current Living Situation sub-assessment.

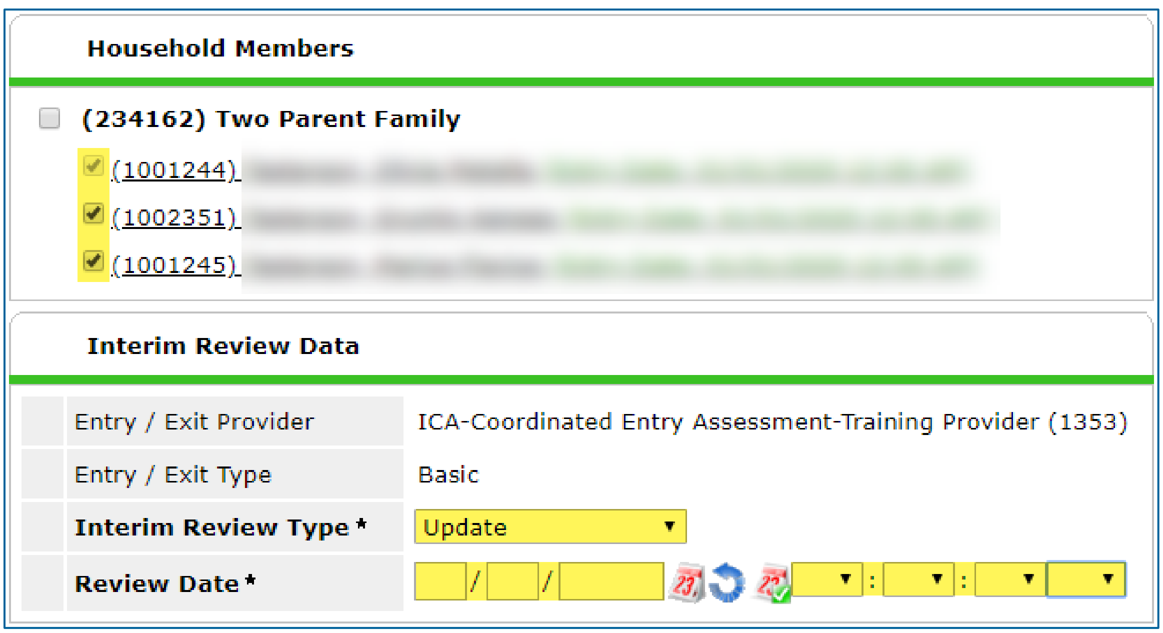
ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program's 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.

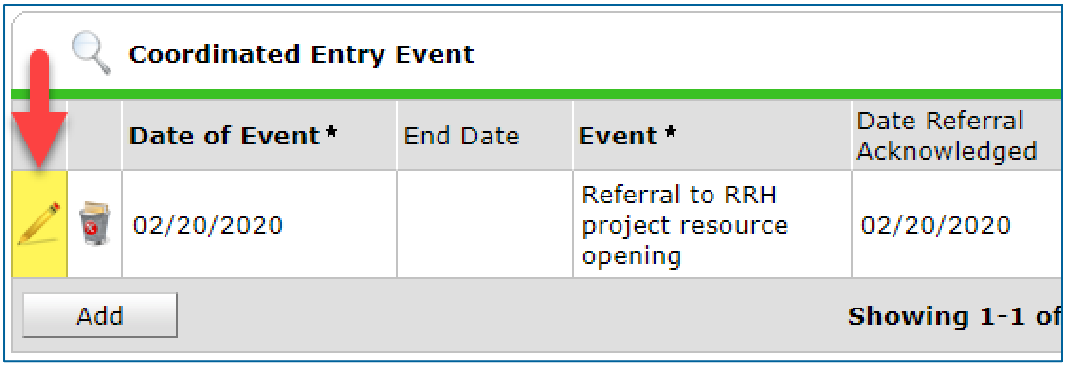


6. Click on **Save & Continue** to proceed to the interim assessment.

UPDATE A CLIENT'S HOUSING REFERRAL

1. In the interim assessment, scroll down to the Coordinated Entry Event sub-assessment.

2. Find your referral's row and click on the **edit pencil**.

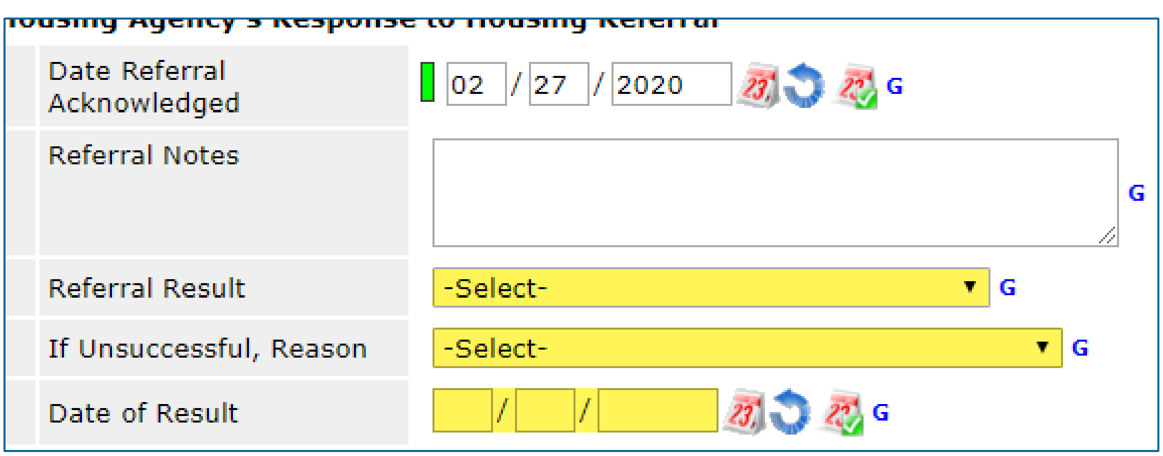


3. In the event pop-up, fill out the following:

   a. Referral Result: Select the **Unsuccessful referral** answer that is most accurate.

   b. If Unsuccessful, Reason: Select the most accurate option. Choose a "Declined" answer when returning a client to the priority list and a "Canceled" answer when removing them from the Priority List.

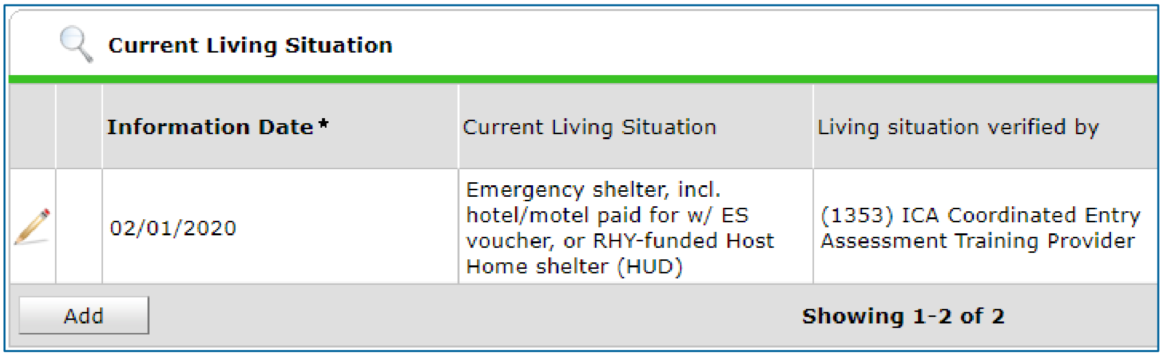
   c. Date of Result: Enter the date the referral was unsuccessful.



4. Click on **Save** when you are done updating the referral.

UPDATE A CLIENT'S CURRENT LIVING SITUATION

1. Scroll down to the Current Living Situation sub-assessment.



   a. 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 Date of Result, then select Save.

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

   a. Start Date: Enter the date the referral was successful.

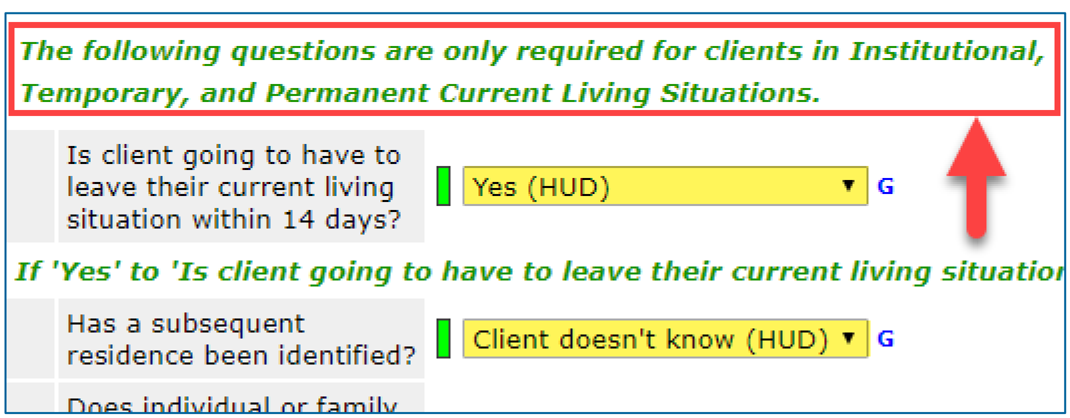
   b. Information Date: Same as the Start Date.

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

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

   e. Living Situation verified by: Click on **Lookup**, then select your housing program's provider.

   f. 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.*

3. Click on **Save** when you are done recording the Current Living Situation.
4. Scroll to the bottom of the interim assessment and select **Exit** to close it.

REMOVE A CLIENT FROM THE PRIORITY LIST

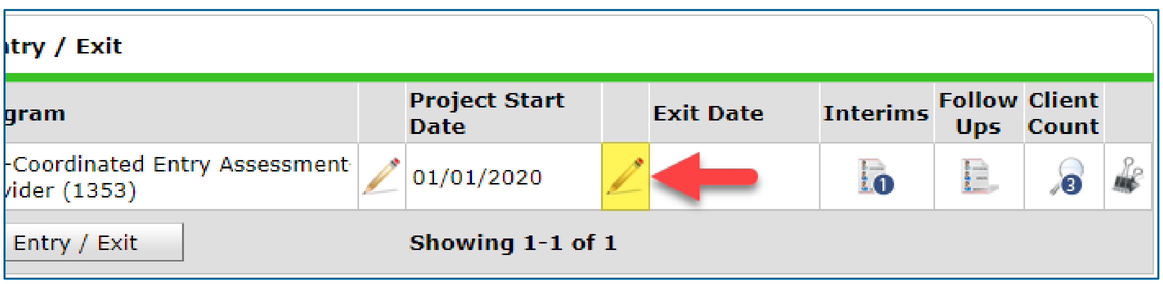
In certain circumstances, a housing provider may remove a client from the Priority List because they are no longer considered to be eligible for a placement in homeless-dedicated housing.

Checklist:

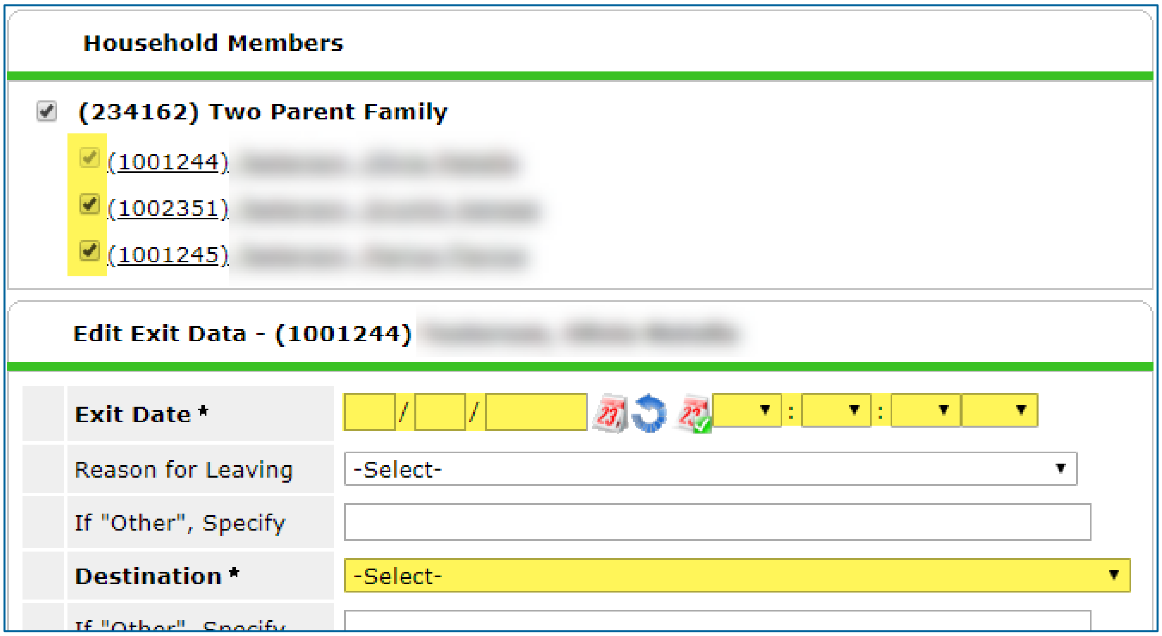
- ✓ Add exit data to the Coordinated Entry Assessment Entry/Exit.
- ✓ Fill out the exit assessment as completely and accurately as possible.

ADD EXIT DATA

1. Click on **Enter Data As** and select your housing program's 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.
   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 **<u>only</u>**.

   ### 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.

HOUSING OUTCOME

After a referral has been marked as successful and a client has been enrolled in a housing program, it is the housing provider's responsibility to record either that a client has been housed, or that they were exited from the program without being housed.

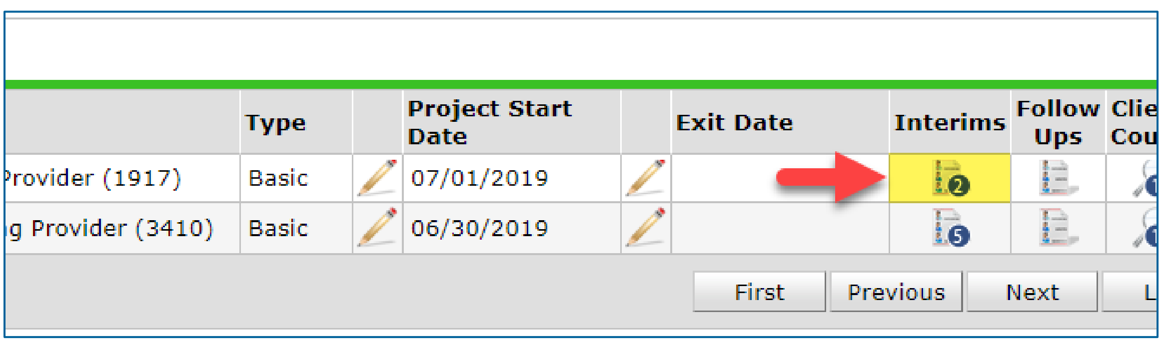
SHOW THAT A CLIENT HAS BEEN HOUSED

Checklist:

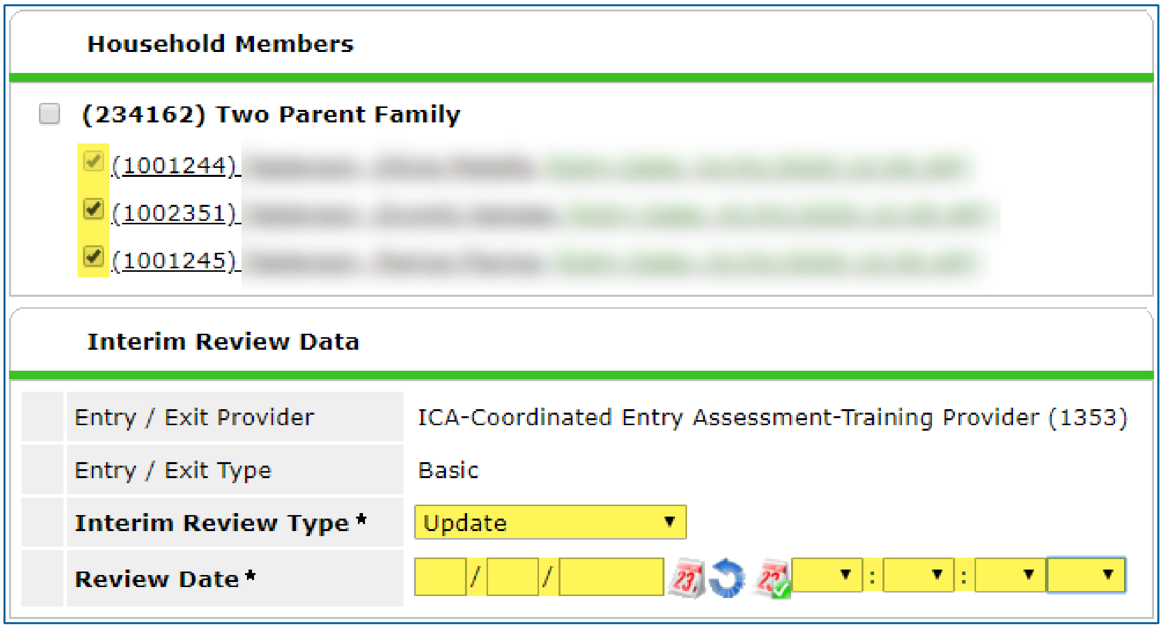
- ☑ Add an interim update to the housing program Entry/Exit.
- ☑ Record a Housing Move-In Date.
- ☑ Add exit data to the Coordinated Entry Assessment Entry/Exit.
- ☑ Fill out the exit assessment as completely and accurately as possible.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program's 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 your housing program's provider.
4. Select the **Interims** icon, then click on **Add Interim Review** in the Interim Reviews pop-up.



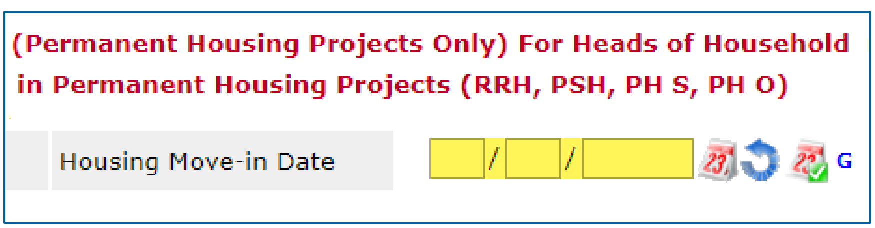
5. Select the following options in the Add Interim Review pop-up:
   a. Household Members: Check the box next to the name of every household member attached to the entry.
   b. Interim Review Type: Select **Update**.
   c. Review Date: The date the client moved into housing.



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

RECORD A HOUSING MOVE-IN DATE

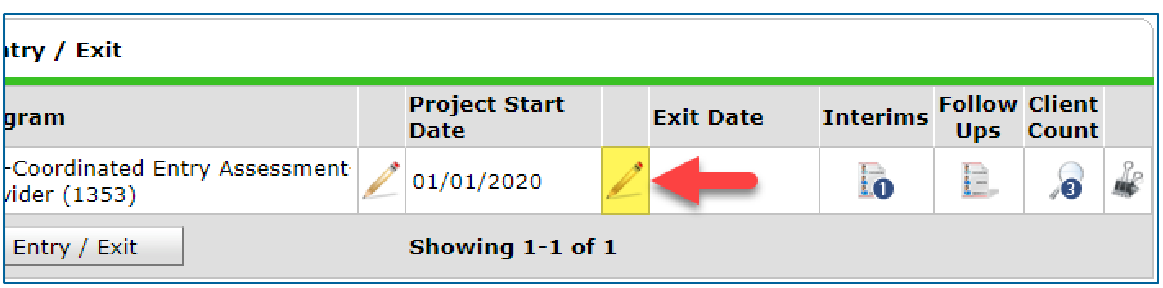
1. In the interim assessment, find the Housing Move-In Date field and enter the date that the client moved into housing.



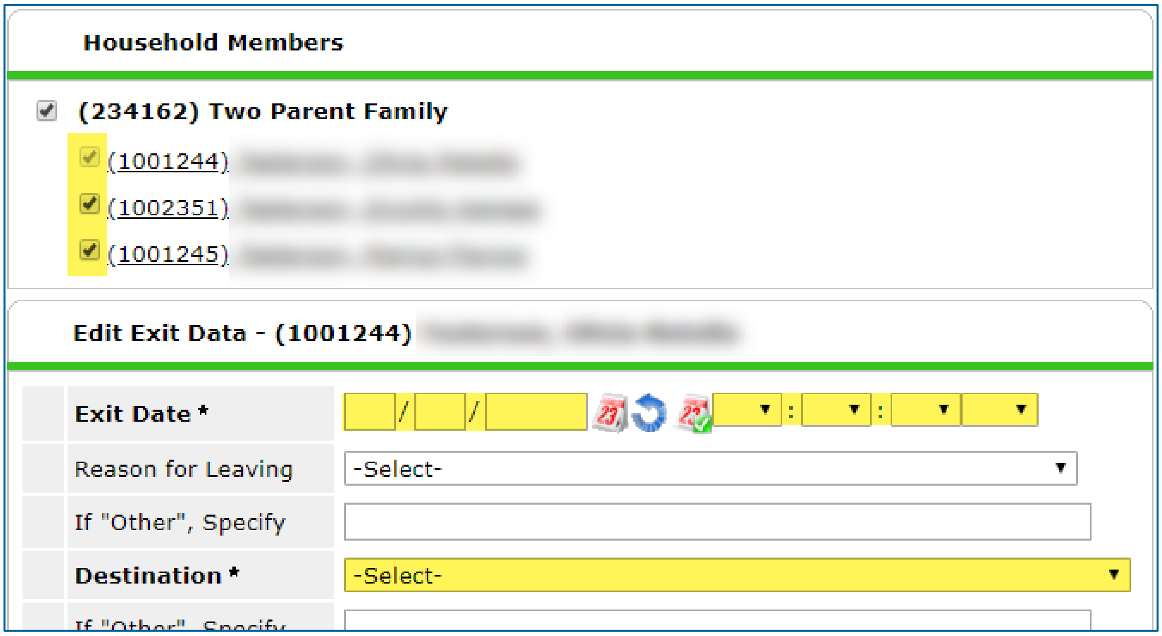
2. Scroll down to the bottom of the assessment and select **Save & Exit** to close it.

ADD EXIT DATA

1. In the Entry/Exit tab, find the row for the Coordinated Entry Assessment provider.
2. Select the **edit pencil** next to the empty Exit Date field.



3. 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.
    b. Exit Date: The date that the client is being removed from the priority list.
    c. Destination: Select the most accurate answer.



4. 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**.

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.

SHOW THAT A CLIENT STILL NEEDS HOUSING

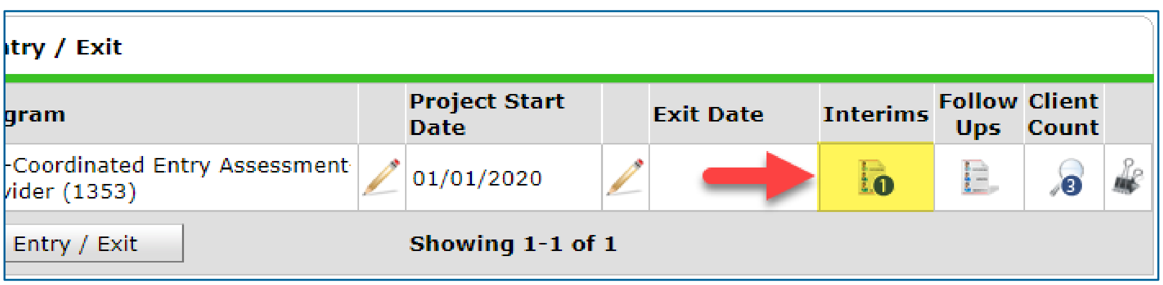
When a client was exited from a program without being housed and wants to continue to participate in Coordinated Entry, follow the directions below to return them to the Priority List.

Checklist:

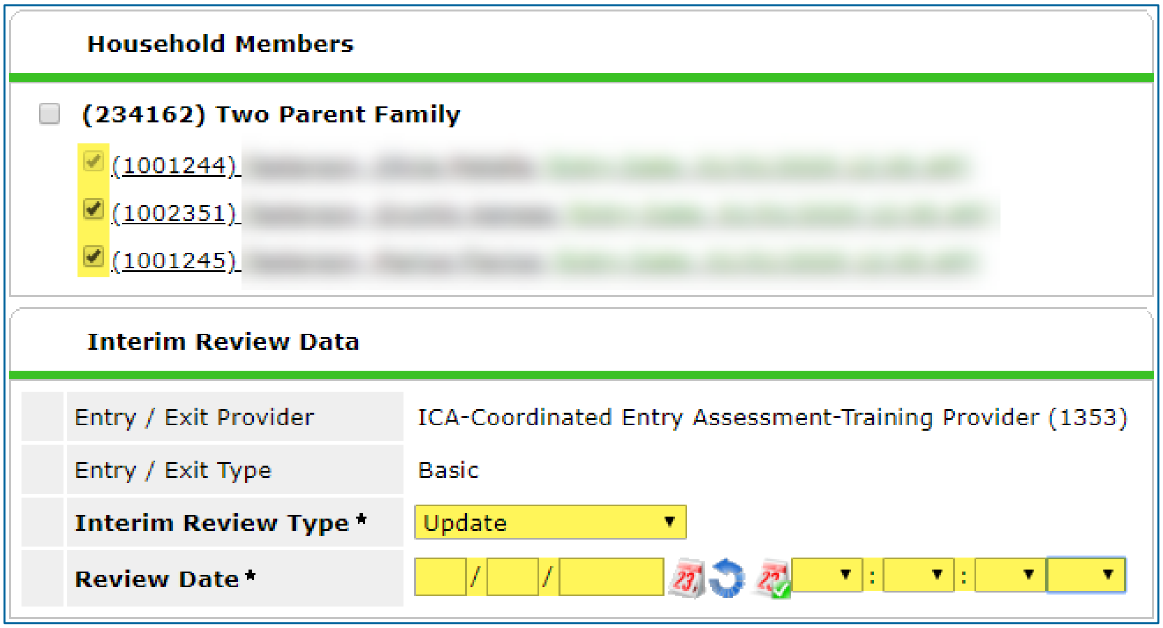
- Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- Update the client's referral in the Coordinated Entry Event sub-assessment.
- Add exit data to the housing program Entry/Exit.
- Fill out the exit assessment as completely and accurately as possible.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your housing program's 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.



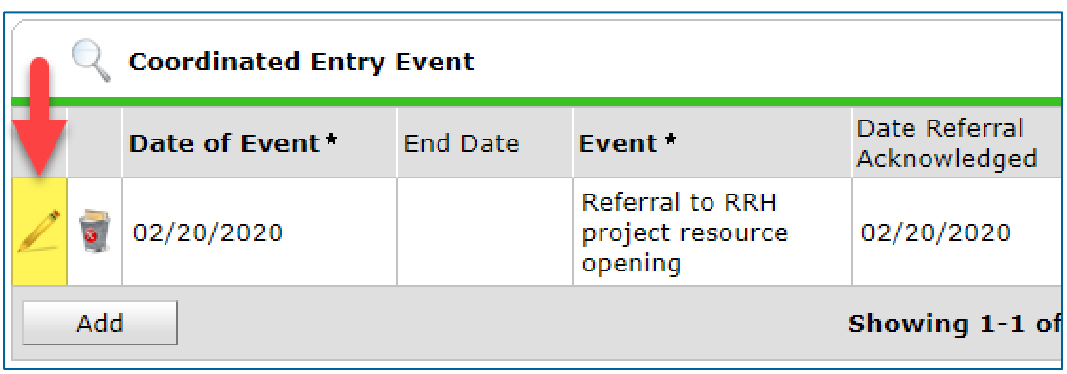
5. Select the following options in the Add Interim Review pop-up:
   a. Household Members: Check the box next to the name of every household member.
   b. Interim Review Type: Select **Update**.
   c. Review Date: The date the client is being returned to the Priority List.



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

UPDATE A CLIENT'S HOUSING REFERRAL

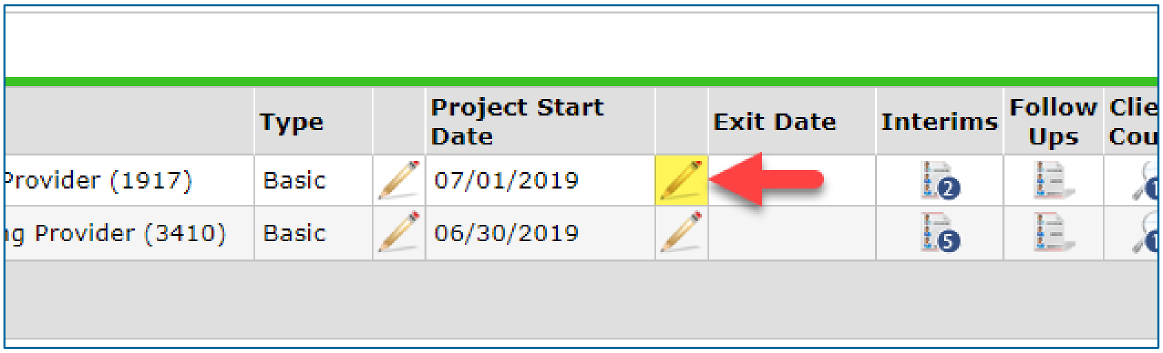
1. In the interim assessment, scroll down to the Coordinated Entry Event sub-assessment.
2. Find your referral's row and click on the **edit pencil**.



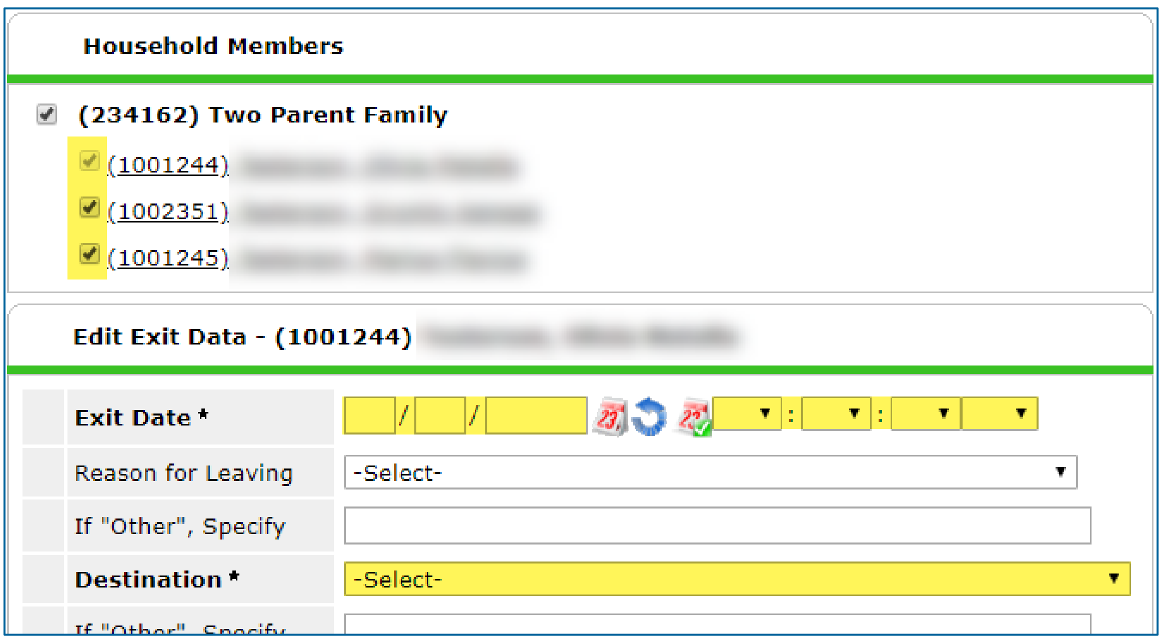
3. In the event pop-up, add an End Date and click on **Save**. <u>Do not</u> make any other updates to the referral.
4. Scroll to the bottom of the interim assessment and select **Exit** to close it.

EXIT A CLIENT FROM A HOUSING PROGRAM

1. In the Entry/Exit tab, find the row created for your housing provider.
2. Select the **edit pencil** next to the empty Exit Date field.



3. 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.
    b. Exit Date: The date that the client exited your program.
    c. Destination: Select the most accurate answer.



4. 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 **all** household members.

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.

REMOVE A CLIENT FROM THE PRIORITY LIST

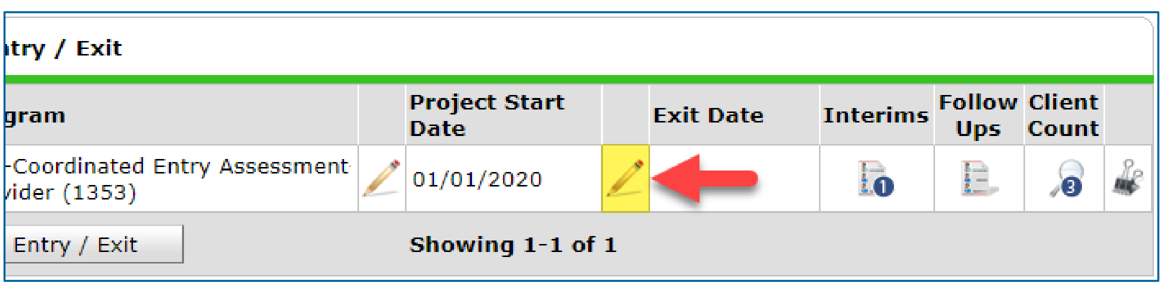
When a client was exited from a program without being housed and will not be participating in Coordinated Entry any longer, follow the directions below to remove them from the Priority List.

Checklist:

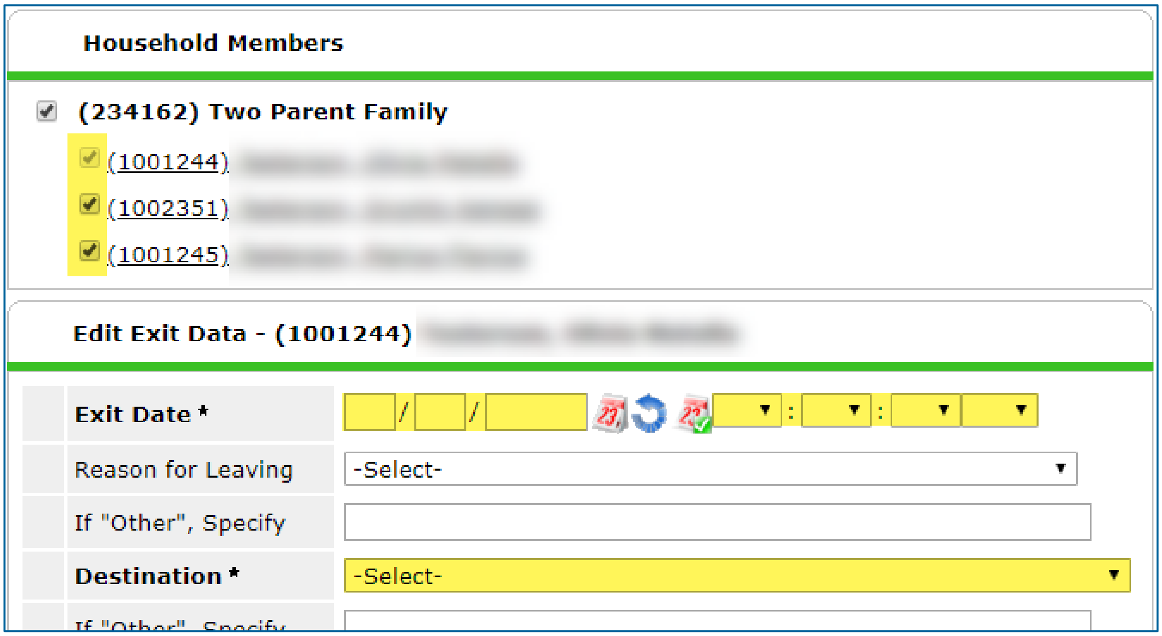
- ☑ Add exit data to the Coordinated Entry Assessment Entry/Exit.
- ☑ Fill out the exit assessment as completely and accurately as possible.

ADD EXIT DATA

1. Click on **Enter Data As** and select your housing program's 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.
   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 **<u>only</u>**.

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.