

Coordinated Entry Data Standard and Workflow Changes Webinar Question Asked	Answer Given
For counties still using the VI-SPDAT, that are score 0-3, are we still adding a Coordinated Entry Event to add them to the Prioritization List?	If you are still using the VI-SPDAT and a client scores a 0 - 3, you can still add a row to the Coordinated Entry Assessment sub-assessment. That client will appear on the priority list report, so long as you choose the option "Placed on Prioritization List" for the field "Prioritization Status."
If a client's living situation (4.12) is only given by client self-reporting and there is no actual documentation, how do we address the verification field?	There is no verification necessary: as you say, Current Living Situation is entirely self-reported. The "verified by" language built into the question is understandably confusing, and really should be thought of as saying "collected by."
When a provider reads a client to the priority list/declines a referral, is there any notification that appears that is easily seen by the Priority List Managers (PLMs) or do they just have to regularly check on statuses of clients?	There isn't a built-in alert in HMIS to let assessors or PLMs know the status of a client. If you want to understand the status of a particular client, checking the client record would be the easiest route. If you want to understand the status of, say, all clients assessed by your agency, this would require a new report! If that is something you want ICA to consider, submit a Custom Report Request https://hmismn.org/custom-report-request/ .
So beyond using the new process for new referrals, is there anything we as assessors need to do to keep people who are currently on the Priority List in order for them to stay on that list through this change?	Nope! Priority List Managers and some local recruits, along with ICA, are currently preparing the data for the transition. You just need to stay on your workflow as is until Sunday, March 22 at 11:59pm. And first thing Monday, March 23, you will start the new workflow!
Can you give some guidance for when you would use "provider rejected" vs "client rejected?" in the referral outcome?	Here is additional information directly from the HUD Data Standards Manual. Client rejected = the client decided to reject the referral to the project; unsuccessful referral, provider rejected = The client referral was rejected by the provider. A provider may determine, after meeting with the client and reviewing eligibility documentation, that a client is not eligible for a project and reject the referral. Or, a provider may reject a client referral if the client failed to respond to the provider requests for eligibility information or otherwise failed to follow through with the requirements of the referral.
Am I right in thinking that if a client is unreachable, that would be a "referral unsuccessful-provider rejected" for referral outcome?	Yes. We also have incorporated the "If unsuccessful, reason" picklist in Minnesota to further explain what happened with that housing referral.

<p>In an unsuccessful referral, how would we know the current living situation if that client is not in contact which is most of the time. Should we use the last known?</p>	<p>In the event of an unsuccessful referral, if the client's Current Living Situation is not known, then no value would have to be recorded.</p>
<p>As an LTH PSH Housing Support Provider, are the housing move-in date and the successful referral date the same?</p>	<p>No. Project Start Date in your LTH PSH project and Referral Result Date (Successful) would match. Housing Move-In Date is often after Project Start Date. Here is more information on Housing Move-In Date: https://hmismn.org/wp-content/uploads/HMI-Date-Brief.pdf.</p>
<p>When would you put in a new vi-spdatt?</p>	<p>You would enter a new Vi-SPDAT into HMIS whenever a new Vi-SPDAT is completed. Check your CoC's policies or contact your Priority List Manager for more information about when a new VI-SPDAT should be completed. When you complete a Vi-SPDAT, a new Coordinated Entry Assessment (4.19) row would be added to represent the latest Coordinated Entry Assessment.</p>
<p>For the CE Event sub-assessment, are we using this sub-assessment for referrals to emergency shelter?</p>	<p>Minnesota will not be using CE Event (4.20) to make emergency shelter referrals at this time (although that is an option in the picklist); we'll only be using that sub-assessment to send a housing referral to Housing Agencies.</p>
<p>Could you very briefly summarize when the CE Event sub-assessment needs to be completed?</p>	<p>Coordinated Entry Event (4.20) is used to record a Housing Referral from the Priority List to a Housing Agency. While there are other options in the event picklist (like referral to emergency shelter or referral to housing navigator), we're only using the sub-assessment for housing referrals at this time.</p>
<p>What if the change being entered isn't a change in a housing situation but something like a household member leaving the household?</p>	<p>If a household's composition is changing - a member is joining or leaving the household - then you would need to add or remove the household member from the Entry/Exit and update the Head of Household's assessment to reflect the new number of household members. If necessary, additional household members can be added to the Households tab as well, but members *should not* be removed or deleted from the Households tab: Deleting or removing household members from the Households tab can cause issues with data entry and reporting. Step-by-step instructions for adding or removing household members will be available in the workflow documents we will be posting to the Coordinated Entry page of the HMIS MN website.</p>
<p>Does this new data workflow eliminate interim reviews?</p>	<p>No; we will continue to use Interim Reviews in the Entry/Exit tab to record new information between Project Start Date (Date household placed onto the Priority List) and Project Exit Date (Date household is removed).</p>

<p>I frequently get referrals that don't match our program, and explain what we can accept, but I still get referrals that just don't fit us, and then I have all this entry stuff to do, when I didn't ask for these type of referrals.</p>	<p>It can certainly be challenging to complete all of the required data entry, especially when you are handling multiple referrals. We have tried to incorporate HUD's requirements in a manner that is least burdensome for users, but there are some pieces that must be included. If you must decline a referral, your minimum data entry would be a "Date of Acknowledgement," "Referral Outcome," "If Unsuccessful, Reason," and a "Date of Event."</p>
<p>For a person under 18, how should we put in interim updates?</p>	<p>If the person is under 18, has the proper consent to share their data, and is a single individual or head of household, then interim updates would be recorded in the same way that they are for adult clients.</p>
<p>If a client chooses not to be shared and signs the HMIS release indicating so, can you clarify what this looks like for entry/exit?</p>	<p>If a client does not consent to share their information and they have not had a record created for them in HMIS, the client will need to follow your CoC's non-HMIS Coordinated Entry process; data sharing is required for those interested in participating in the HMIS priority list. For those clients who <i>*revoke*</i> their consent to share after they have previously consented to share, steps would need to be taken to remove sharing from their record. Those same clients would have to engage with your CoC's non-HMIS Coordinated Entry process. Please contact the Helpdesk (mnhmis@icalliances.org) if a client revokes previously-granted consent so that we can provide additional guidance.</p>
<p>Do we put an end date for the old assessment or just leave them all open?</p>	<p>When completing a new assessment for a client, you will want to add an End Date to the old sub-assessment row before adding a new row. If you are only updating a portion of the assessment, like a client's income or contact information, it is <i>*not*</i> necessary to end the old row and add a new one.</p>
<p>So, in summary, will there be 2 lines open when a provisional offer is made (1 line from the Assessor and 1 line for the provider)? Yet, the person will remain on the priority list?</p>	<p>CE assessments will be recorded in the Coordinated Entry Assessments sub-assessment by assessors. CE events will be recorded for each housing referral and priority list managers and housing providers will contribute. 1 row per housing referral.</p>
<p>I have noticed that you can only add people to an entry by clicking on the original assessment date and not an interim. Is this still true?</p>	<p>You are correct! It would be necessary to first add a new household member on the original assessment date, then enter the client's unique Project Start Date in the entry assessment.</p>
<p>Is there a document that will be available outlining the changes in the workflow?</p>	<p>Absolutely! Those will be made available after the webinar today on our website: hmismn.org/coordinated-entry</p>

<p>In addition to the CES Assessment - Step 2, St. Louis County was completing a HUD CoC All-Inclusive B Entry Assessment for all household members, because of their HUD CoC grant. Because HUD has released actual data collection requirements for HUD CoC funded CE projects since the 2017 launch of CES in HMIS in MN, has this special workflow for SLC been re-evaluated and/or changed?</p>	<p>We have reached out to the SLC Priority List Manager(s) for discussion!</p>
<p>Since the new CES sub-assessments require updates to rows with no "End Date," would it be possible to include the "End Date" field in the preview window?</p>	<p>It's something we'd like to do, but haven't been able to yet. Including pertinent information in the sub-a preview - like "Provider Referred To" in the CE Event sub-a - can have a big impact on the way in which users interact with those sub-assessments.</p>
<p>If a household is accepted on a project but not housed yet will they remain on the list?</p>	<p>Excellent question! When a household is referred to a housing program, they are removed from the prioritization tab(s) of the Priority List report to a "Pending Referrals" tab. Once that pending referral is marked as "Successful," the household moves to a different tab on the report. The household will not be removed from the report entirely until their Coordinated Entry Assessment Entry/Exit has been closed. This enables them to be easily sent back to the prioritization tabs if the household members are not housed by the program.</p>
<p>For the current living situation can we start it on the 23rd or do we have to go back to their entry date?</p>	<p>Start using all 3 new data elements, including current living situation, on the 23rd. You do not need to backlog data entry (for example, if a client had a CE Assessment completed on February 28, 2020, this wouldn't be entered into the CE Assessment 4.19 subassessment). Any Assessments (4.12), Events (4.20), or Current Living Situations (4.12) from March 23rd and forward.</p>
<p>Do you only update the Current Living Situation if it has changed since the last recorded info? Otherwise should you leave it and not record a new sub-assessment line?</p>	<p>Our interpretation of the HUD Data Standards Manual is that a new row would be added so you can see when it was recently verified even if the Current Living Situation has not changed. For example, the client who is staying in emergency shelter may have 4 different rows in their Current Living Situation for each time that living situation was verified due to re-assessment (4.19), a CE Event update (4.20), or a community defined length of time. So, yes.</p>

<p>If reassessing clients, do you enter a new Coordinated Entry Assessment data element? And do you need to end the current one if you exit someone from the PL?</p>	<p>For the first question, yes! This is when you are completing a new CES Assessment/re-assessment, you would add a row to Coordinated Entry Assessment (4.19). For the latter, you shouldn't need to add an end date. The way we train is that only add an end date if you have new information to add into a new row for CE Assessment (4.19). I'll just add that the only time that you need to add an End Date to the most recent sub-assessment row for these 3 new Coordinated Entry data elements is when a referral was Successful (in CE Event 4.20 sub-assessment), but the client was not housed and needs to be returned to the PL.</p>
<p>Re: the Current living situation... Maybe this is a better way to ask the question. Are we to record a new sub-assessment line every time one of the following: New/reassessment, New CES Event, CES Event update (acknowledgement, referral solution), or CoC defined time period has been reached? Or ONLY when one of those things happens AND the living situation is different than the most recent location recorded.</p>	<p>HUD's Data Standards Manual does not say anything about taking into account a client's most recent value (https://files.hudexchange.info/resources/documents/HMIS-Data-Standards-Manual.pdf#page=138); rather, HUD's language reads as an expectation that users will record a Current Living Situation value every time one of the specified types of contact are made. ICA acknowledges that the information may not always be available to users - e.g. when acknowledging a referral, or even making contact with a client - so the expectation is that the data will be entered whenever it can be collected.</p>
<p>Re: CE Assessment data element...So yes to adding an end date if you reassess. Otherwise, no need to end the 4.19 sub-assessment line when removing a client from the PL. Is that right?</p>	<p>That's correct!</p>
<p>If a referral is successful, but the client is not housed and placed back on the PL, how do we show WHY the client was not housed. If the client is removed from the PL, we collect a reason on the exit assessment. But I don't see a place to collect this for clients who are returned to the PL.</p>	<p>That's an excellent suggestion, and one that we could certainly look at integrating into the workflow. As with recommendations for the "If Unsuccessful, Reason" picklist and other shared Coordinated Entry fields, the suggestion that an "If Not Housed" field be added to the Coordinated Entry Event sub-assessment would likely need to be brought to the Priority List Managers for their consideration.</p>

<p>If a client is housed and then loses housing, will the provider then enter an end date for the referral? If not, how can assessors tell whether someone is back on the priority list or if the referral is still open?</p>	<p>When someone is housed, their existing entry for the Coordinated Entry provider should be closed. Thus, ideally, an assessor should be able to tell that someone is back on the priority list if they have an open entry; another clue is if that open entry's Project Start Date is more recent than any previous housing referrals. One thing I'm excited about and could help here: there are plans in the works for a report that any user could run to tell if someone has been assessed for Coordinated Entry and if they have a pending housing referral.</p>
<p>We have multiple staff that submit referrals under one EDA. Without the data count reports on the home page, how can we coordinate when referrals come in?</p>	<p>Incoming housing referrals from your Priority List Managers to your agency will be communicated to you outside of HMIS at the point they are made. Your PLM will also document that housing referral to your agency in the Coordinated Entry Event (4.20) sub-assessment. Our Reporting Team is creating a report that pulls on that new 4.20 sub-assessment to help you track those incoming housing referrals.</p>
<p>What if assessor forgets to put share in alias box?</p>	<p>Oops! This is an important step to document a consented HMI ROI. That being said, the Date of ROI Consent is the most critical field. Double check with client that they agree to sharing and add SHARED to Alias. If not, notify the Helpdesk so we can close that record and assessor should take next steps to refer through non-HMIS protocol.</p>
<p>When a client graduates a housing program or is terminated, do housing providers update that information also? If so, how is this to be documented?</p>	<p>The outcome of someone's exit from a housing program would be captured in the Exit Destination that you enter. This is somewhat outside of the CES process and follows the regular workflow for starting/updating/finishing Entry Exits for the actual housing program. So you just follow those steps - there is not additional action to take at that point to inform CES. If a client is terminated from your housing program and is being exited to a homeless situation, you will want to provide that client with local resources, and that may include connecting them to an agency that completes CES assessments. But that is more of a direct service real world connection (there's not an automated way to do that through CES).</p>