

THE MIGRATION FROM 3877

Project Goal: Reconcile all open Entry Records in provider 3877 (St. Louis Coordinated Entry-CE-SLC-HUD) by either (1) moving to your agency's Coordinated Entry Assessment provider or (2) adding an Exit Date to the Entry into provider 3877. This will occur in phases. Phase 1 will be addressing client records that are OPEN to statewide data sharing. Phase 2 will address client records that are CLOSED to statewide data sharing.

As Saint Louis CoC (SLC) will be using Entry Records into your agency's Coordinated Entry Assessment provider to populate the SLC Priority List, only enter (or move) active participants into your Coordinated Entry Assessment provider.

PHASE 1 OVERVIEW

Move the Entry Record from 3877 to your agency's Coordinated Entry Assessment provider for participants that meet the following criteria:

- (1) Participant has an Entry Record into provider 3877 without an Exit Date
- (2) Participant's client record was created after 10/3/2016
- (3) Client record is open to statewide data sharing
- (4) Participant is still in need of housing

The agency that originally assessed the participant and added an Entry record into provider 3877 is responsible for this task.

PHASE 1 INSTRUCTIONS

ADDING AN ENTRY RECORD INTO YOUR COORDINATED ENTRY ASSESSMENT PROVIDER

1. Click on "Enter Data As" (EDA) and select your Coordinated Entry Assessment provider.
2. Enter the client's record.
3. You do not need to backdate for these steps.
4. In the Entry/Exit tab, click on Add Entry/Exit.
5. Include all applicable household members in the Entry by checking the boxes. If household members have changed since Entry into provider 3877, only check household members that are still active and want to be housed with the assigned Head of Household.
 - a. **Provider** prompt should be filled in as your Coordinated Entry Assessment provider.
 - b. **Date** should match the Entry into provider 3877. If the date is BEFORE 10/3/2016, stop. We aren't creating steps for clients created BEFORE 10/3/2016 at this time.
 - c. **Entry Type:**
 - i. Select HUD if Category 1 LITERALLY HOMELESS upon ENTRY DATE. (Note: We are still double checking this with the HUD contact to confirm HUD only wants clients literally homeless upon Entry on the APR.)
 - ii. Select BASIC for all other. (This will ensure that clients that are not Category 1 LITERALLY HOMELESS upon Entry can be extracted from APR, if necessary.)

- iii. If unsure which type, you can wait and update TYPE on next pop-up once you see living situation responses that were answered on their original 3877 Entry Assessment. If needed, change the Entry Type at top of next pop-up via the drop-down and click on Update.
6. Click on Save and Continue.
7. You should notice data entered originally upon entry into 3877 pulls onto the HUD All Inclusive Assessment. If you toggle to the CES Assessment: SLC, you'll notice it is mostly blank. This is because this assessment is new!
 - a. If you have information for the CES Assessment: SLC or any information to add to the HUD All Inclusive for what was true upon the Entry Date, you can populate it now.
 - b. If you have data to add that was NOT true upon Entry, but data that reflects a change, you can add that as an Interim Update using the Information Date as your date.
8. Click on Save & Exit.

Tip! To help your Priority List Manager make good referrals, connect with the participant (Head of Household) and ask questions regarding their CES preferences for the CES Assessment: SLC. Input the data via an Interim Update using the Information Date as your date.

DELETING THE 3877 ENTRY RECORD

As your Priority List Manager is going to pull your CoC's APR out of HMIS using 3877 (for this year's submission) and your Coordinated Entry Assessment provider, we don't want duplicate clients populating. Now that you have an Entry Record recorded for the household in your Coordinated Entry Assessment provider, it is time to delete the Entry Record into provider 3877.

1. EDA to provider 3877 (if you are unable to EDA to this provider, contact the Helpdesk mnhmis@icalliances.org).
2. Enter the participant's record – start with the Head of Household.
3. Do not backdate.
4. In the Entry/Exit tab, click on the trash can to the left of the Entry Record.
5. You have now deleted the Head of Household's Entry into provider 3877. If there are additional household members, you will need to go to EACH household member's client record and repeat steps 2 – 4 above.

Q&A

1. Should I create Exits for clients with Entries that are old/I don't know where the clients are?

If you're not sure of a person's status anymore, please follow procedures that are in line with St. Louis County's Coordinated Entry System's Policies and Procedures. In the most recent version of the Policies and Procedures manual I have, it states, "If a consumer remains in the system for 45 days and the Assessment Specialist attempts to contact them 3 times, after that time the Assessor will exit the client from the SLC CE provider in HMIS." I would encourage you to reach out to the Heading Home St. Louis County Governance Board if you are unsure of the correct process.

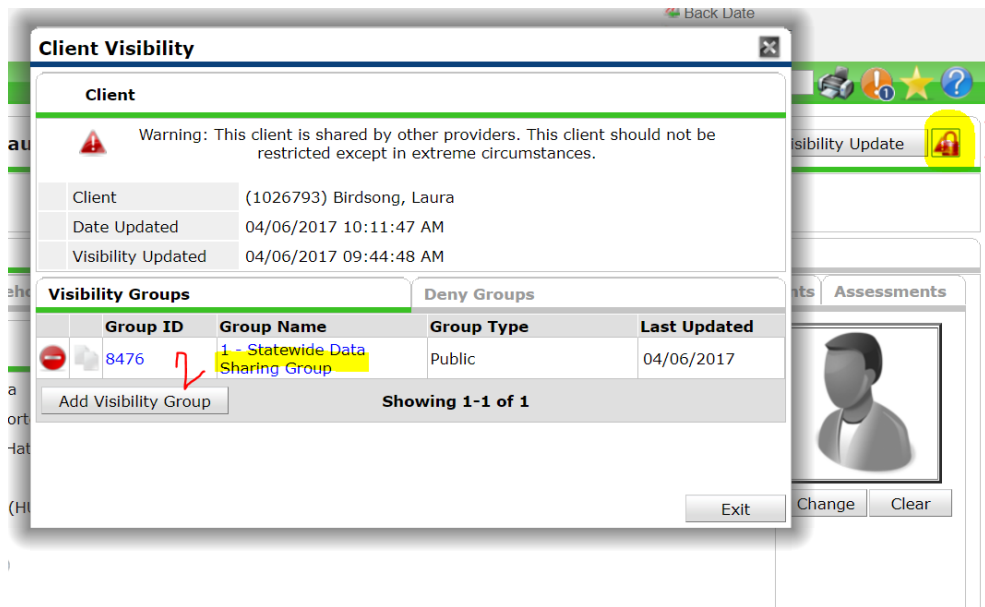
Additionally, keep your Priority List Manager (Kate Bradley for Duluth/South, and Heather Lindula for the Iron Range/North) up-to-date with any changes and they are currently managing a Priority List outside of HMIS (as of 7/3/2017).

2. **How do I know which client records I am responsible for?** For now, email Drew Klinkert (drew.klinkert@icalliances.org) and he'll generate a report for you.

3. **What do I do if the record is closed to statewide data sharing, but was created after 10/3/2016?** A participant must agree to statewide data sharing to participate in Coordinated Entry via HMIS. If the participant is no longer active on the priority list, add an End Date for the Entry Record into provider 3877. We will address what to do with closed client records in Phase 2 of this migration project.

4. **How can I tell if the client record is open to statewide data sharing?** The agency that created the client record is responsible for ensuring proper consent from client via the HMIS ROI to share information statewide. Upon record creation, the agency should document consent and indicate the record is intended to be shared statewide by:
 - Completing Date of ROI Consent (available on the Client Profile tab or your Coordinated Entry Assessment)
 - Adding SHARED to the Alias field

Note: While this documentation is important to let other agencies know you obtained proper consent, these fields are for documentation purposes only. To understand whether or not a client record is in fact shared statewide, you should consult the lockbox icon in the top-right of a client record.



The only caveat is that sometimes (due to complex visibility things that we are not going to get into in these instructions) the Client Visibility pop-up will say restricted for Group Name and Group Type. In these instances, email the Helpdesk mnhmis@icalliances.org to confirm, as necessary.

5. **What about client records created before 10/3/2016?** First, confirm that the participant is still in need of housing and should remain on the Priority List.

Not active? If the participant is no longer active, add an End Date. Make sure to keep your Priority List Manager (Kate Bradley for Duluth/South, and Heather Lindula for the Iron Range/North) up-to-date with any changes and they are currently managing a priority list outside of HMIS (as of 7/3/2017).

Active? If the participant is still active, you cannot release data you entered before client signed the HMIS ROI (which was first made available on 10/3/2016) to statewide data sharing. We will be addressing these client records in Phase 2 of this migration project. In the meantime, you can confirm with your Priority List Manager that the participant is still on the “non-HMIS” Priority List (the Priority List maintained outside of HMIS).