

MINNESOTA’S 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.

TABLE OF CONTENTS

- Referral 2
 - Acknowledge a Housing Referral..... 2
 - Mark a Referral as Successful 4
 - Mark a Referral as Unsuccessful 9
 - Remove a Client from the Priority List 13
- Housing Outcome 15
 - Show That a Client Has Been Housed..... 15
 - Show That a Client Still Needs Housing..... 18
 - Remove a Client from the Priority List 22
- Appendix A – View a Client’s Most Recent Information..... 24
 - Assessments Tab 24
 - Determine a Client’s Referral Status 24
- Appendix B – Coordinated Entry Reports..... 25



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. **Note: The term "client" will be used throughout this document to refer to a person experiencing homelessness.**

ACKNOWLEDGE A HOUSING REFERRAL

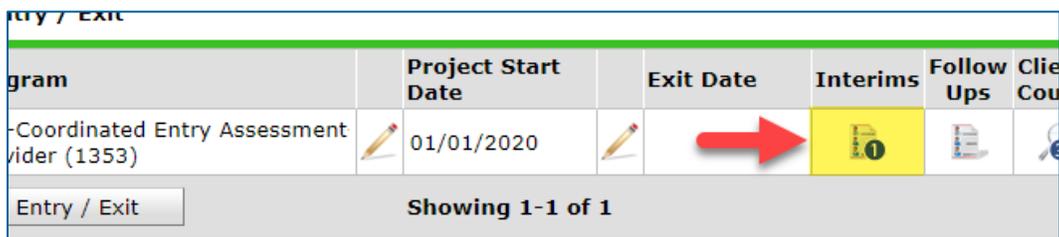
When a housing provider learns that they've been sent a referral, they should acknowledge that referral in HMIS. In the past, this step was called "provisional acceptance."

In this section, you will...

- ✓ 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 referral is being acknowledged. When the **Back Date Mode** pop-up appears, select **Use Current System Date**.
3. Click on the **Entry/Exit** tab and find the **Coordinated Entry Assessment** provider's row.
4. Select the **Interims** icon, then click on **Add Interim Review** in the **Interim Reviews** pop-up.



Program	Project Start Date	Exit Date	Interims	Follow Ups	Client
Coordinated Entry Assessment Provider (1353)	01/01/2020				

Showing 1-1 of 1

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. Find the row that was created for your housing program and click its [edit pencil](#).

Coordinated Entry Event					
	Start Date *	Event *	Location of Crisis Housing or Permanent Housing	Housing Provider Contact Name	Date
	01/01/2020	Referral to Other PH project/unit/resource opening	(1410) ICA ES HCC DHS OEO ESP Training Provider	John Doe	

Showing 1-1 of 1 records

Check the **Start Date, **Location**, and **Housing Provider Contact** fields to find your housing program's referral.*

- b. Set the [Date Referral Acknowledged](#) as the date you learned of the housing referral.

Housing Agency's Response to Housing Referral	
Date Referral Acknowledged	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>    G
Referral Notes	<input type="text" value=""/> G
Referral Result	<input type="text" value="-Select-"/> G

- c. Click on [Save](#) when you are finished entering the [Date Referral Acknowledged](#).
2. Review the assessor and client contact information and any other assessment details that you need to reach out to the client.
3. Scroll down to the bottom of the assessment and select [Exit](#) to close it.

Now that you've acknowledged the referral, the next step is to reach out to the client. Depending on what happens from here, there are two possible outcomes:

- [Mark the referral as successful](#): You make contact with the client and confirm their eligibility and intent to enroll in your housing program.
- [Mark the referral as unsuccessful](#): You are unable to make contact with the client, they are not eligible for your housing program, or they are unable to enroll for another reason.

MARK A REFERRAL AS SUCCESSFUL

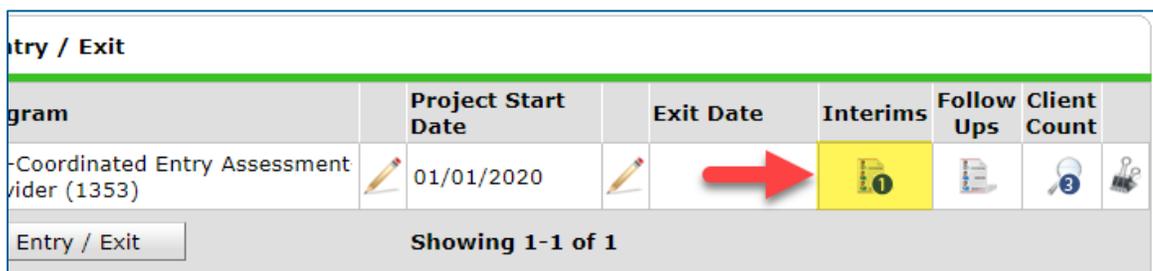
When a person's eligibility has been confirmed and you are prepared to enroll them in your housing program, you should mark their referral as **successful**.

In this section, you will...

- ✓ 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.



Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Coordinated Entry Assessment Provider (1353)	01/01/2020				

Showing 1-1 of 1

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.

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 *	<input type="text"/> / <input type="text"/> / <input type="text"/>    <input type="text"/> : <input type="text"/> : <input type="text"/> <input type="text"/>

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. Find your referral’s row and click on its **edit pencil**.

Coordinated Entry Event

	Start Date *	Event *	Location of Crisis Housing or Permanent Housing	Housing Provider Contact Name	Date of Result
	01/01/2020	Referral to Other PH project/unit/resource opening	(1410) ICA ES HCC DHS OEO ESP Training Provider	John Doe	

Add Showing 1-1 of 1

Check the **Start Date, **Location**, and **Housing Provider Contact** fields to find your housing program’s referral.*

- b. Set the Referral Result to **Successful referral: client accepted**.
- c. Enter the **Date of Result** as the date the referral was successful.

Referral Result	-Select-  
If Unsuccessful, Reason	-Select-  
Date of Result	<input type="text"/> / <input type="text"/> / <input type="text"/>    <input type="text"/> 

- d. **Do not** make any other updates to the referral. Click on **Save**.

UPDATE A CLIENT’S CURRENT LIVING SITUATION

1. In the interim assessment, scroll down to the [Current Living Situation](#) sub-assessment. This data element shows that contact was made between a client and a service provider and captures details about the client’s living situation at the time of the interaction. If known, update the client’s living situation when their referral is resolved.

 Current Living Situation				
	Start Date *	End Date	Current Living Situation	Is client going to have their current living situ within 14 days?
 	02/01/2020		Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)	No (HUD)
Add Showing 1-2 of 2				

2. Click on the [magnifying glass](#) to open the sub-assessment pop-up.
3. Check for an active row without an [End Date](#).
 - a. If there is one, click on that row’s [edit pencil](#).
 - b. In the [Edit Recordset](#) pop-up, enter an [End Date](#) that is **one day prior** to the referral result date, then select [Save](#).

Edit Recordset - (1058691) ✕

Current Living Situation  

Start Date *	<input type="text" value="01"/> / <input type="text" value="01"/> / <input type="text" value="2020"/>    G
End Date	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>    G

Ensure that Information Date matches Start Date above

4. 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 value selected for the [Current Living Situation](#) field, you may be required to answer additional questions to further describe the client’s living situation.

Safe Haven (HUD)

----- INSTITUTIONAL SITUATIONS -----

Foster care home or foster care group home (HUD)

Hospital or other residential non-psychiatric medical facility (HUD)

Jail, prison or juvenile detention facility (HUD)

Each **Current Living Situation value is categorized as a Homeless, Institutional, Temporary, or Permanent Situation. Read the green helper text carefully to decide if additional questions need to be answered.*

The following questions are only required for clients in Institutional, Temporary, and Permanent Current Living Situations.

Is client going to have to leave their current living situation within 14 days? Yes (HUD) G

If 'Yes' to 'Is client going to have to leave their current living situation

Has a subsequent Client doesn't know (HUD) G



5. Click on **Save** when you are done recording the [Current Living Situation](#).
6. 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.

Project Start Data - (1) Phoenix, The	
Provider *	ICA-ES-HCC-DHS-OEO-ESP- Training Provider (1410) <input type="button" value="Search"/> <input type="button" value="My Provider"/>
Type *	-Select- ▼
Project Start Date *	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="23"/> <input type="button" value="↺"/> <input type="button" value="23"/> <input type="button" value="▼"/> : <input type="button" value="▼"/> : <input type="button" value="▼"/> <input type="button" value="▼"/>

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

FILL OUT AN ENTRY ASSESSMENT

- 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.

(Permanent Housing Projects Only) For Heads of Household in Permanent Housing Projects (RRH, PSH, PH S, PH O)

Housing Move-in Date	<input type="text"/> / <input type="text"/> / <input type="text"/> <input type="button" value="23"/> <input type="button" value="↺"/> <input type="button" value="23"/> <input type="button" value="G"/>
----------------------	--

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

If the client has moved into housing and has been removed from the Priority List, data entry is complete. If they **have not** moved into housing yet, it is your responsibility to record an accurate [housing outcome](#) at a future date.

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.

In this section, you will...

- ✓ Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- ✓ Add a new row to the Current Living Situation sub-assessment.
- ✓ 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.

Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Coordinated Entry Assessment Provider (1353)	01/01/2020				

Entry / Exit Showing 1-1 of 1

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) [blurred]
- (1002351) [blurred]
- (1001245) [blurred]

Interim Review Data

Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update ▼
Review Date *	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> <input type="button" value="23"/> <input type="button" value="23"/> <input type="button" value="23"/>

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. Find your referral’s row and click on its **edit pencil**.

	Start Date *	Event *	Location of Crisis Housing or Permanent Housing	Housing Provider Contact Name	Da Ac
	01/01/2020	Referral to Other PH project/unit/resource opening	(1410) ICA ES HCC DHS OEO ESP Training Provider	John Doe	

Showing 1-1 of 1

Check the **Start Date, **Location**, and **Housing Provider Contact** fields to find your housing program’s referral.*

- b. Set the **Referral Result** to the **Unsuccessful referral** answer that is most accurate.
- c. Select the most accurate answer for the question **If Unsuccessful, Reason**. Choose a “Declined” answer when returning a client to the Priority List and a “Canceled” answer when removing them from the Priority List.
- d. Enter the **Date of Result** as the date the referral was unsuccessful.

Housing Agency's Response to Housing Referral

Date Referral Acknowledged	02 / 27 / 2020	G
Referral Notes	<input type="text"/>	
Referral Result	-Select-	G
If Unsuccessful, Reason	-Select-	G
Date of Result		G

e. **Do not** make any other updates to the referral. Click on **Save**.

UPDATE A CLIENT'S CURRENT LIVING SITUATION

1. Scroll down to the **Current Living Situation** sub-assessment. This data element shows that contact was made between a client and a service provider and captures details about the client's living situation at the time of the interaction. If known, update the client's living situation when their referral is resolved.

Current Living Situation			
	Information Date *	Current Living Situation	Living situation verified by
	02/01/2020	Emergency shelter, incl. hotel/motel paid for w/ ES voucher, or RHY-funded Host Home shelter (HUD)	(1353) ICA Coordinated Entry Assessment Training Provider

Showing 1-2 of 2

2. Click on the **magnifying glass** to open the sub-assessment pop-up.
3. Check for an active row without an **End Date**.
 - c. If there is one, click on that row's **edit pencil**.
 - d. In the **Edit Recordset** pop-up, enter an **End Date** that is **one day prior** to the referral result date, then select **Save**.

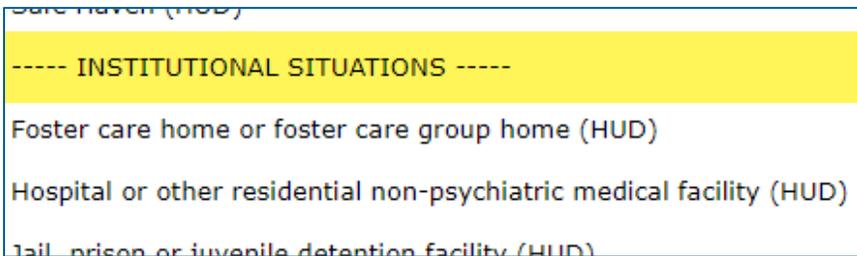
Edit Recordset (1030091)

Current Living Situation

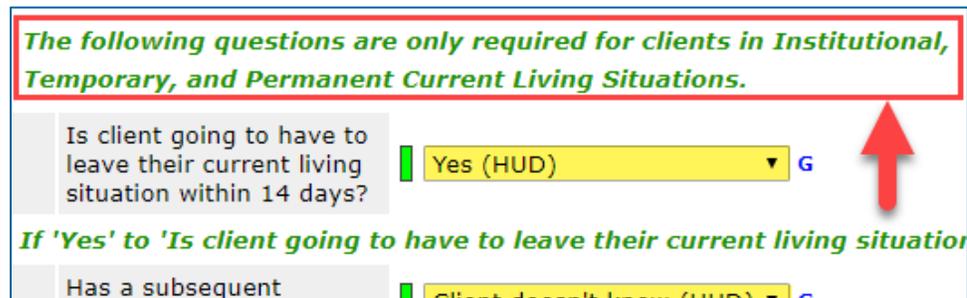
Start Date *	01 / 01 / 2020	G
End Date		G

Ensure that Information Date matches Start Date above

4. Click on **Add** and fill out the following fields:
 - a. **Start Date**: Enter the date the referral was unsuccessful.
 - 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 value selected for the **Current Living Situation** field, you may be required to answer additional questions to further describe the client’s living situation.



Each **Current Living Situation value is categorized as a Homeless, Institutional, Temporary, or Permanent Situation. Read the green helper text carefully to decide if additional questions need to be answered.*



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

At this point, the client will continue to be considered for new housing opportunities. If you know they should be removed from the Priority List, see the section [Remove a Client from the Priority List](#) for instructions.

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.

In this section, you will...

- ✓ 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.

Entry / Exit						
Program		Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Coordinated Entry Assessment Provider (1353)		01/01/2020				
Entry / Exit		Showing 1-1 of 1				

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.

Household Members

(234162) Two Parent Family

- (1001244)
- (1002351)
- (1001245)

Edit Exit Data - (1001244)

Exit Date *	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/> <input type="button" value="23"/> <input type="button" value="23"/> <input type="button" value="23"/>
Reason for Leaving	-Select- ▼
If "Other", Specify	<input type="text"/>
Destination *	-Select- ▼
If "Other", Specify	<input type="text"/>

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

FILL OUT AN EXIT ASSESSMENT

- 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.

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

At this point, the client should no longer appear on the Priority List. Contact your Priority List Manager or the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.

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. **Note: The term "client" will be used through this document to refer to a person experiencing homelessness.**

SHOW THAT A CLIENT HAS BEEN HOUSED

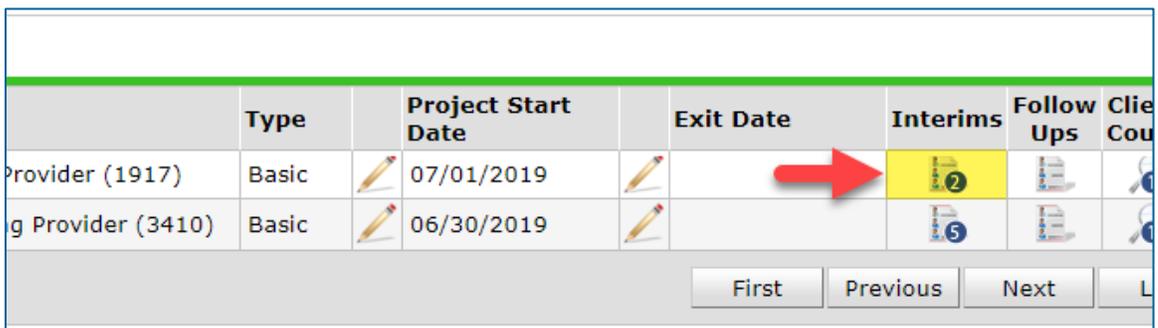
When a client has been housed, it is critical that a Housing Move-In Date be entered and that the client be removed from the Priority List. This will prevent them from being considered for future housing opportunities in place of someone who is still experiencing homelessness.

In this section, you will...

- ✓ 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.



	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Provider (1917)	Basic	07/01/2019		2		
g Provider (3410)	Basic	06/30/2019		5		

First Previous Next L

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.

Interim Review Data

Entry / Exit Provider	
Entry / Exit Type	Basic
Interim Review Type *	Update
Review Date *	<input type="text"/> / <input type="text"/> / <input type="text"/>

- 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.

(Permanent Housing Projects Only) For Heads of Household in Permanent Housing Projects (RRH, PSH, PH S, PH O)

Housing Move-in Date / /

- 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.

Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
Coordinated Entry Assessment Provider (1353)	01/01/2020				

Showing 1-1 of 1

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.

If the **Housing Move-In Date** has been entered and the client been removed from the Priority List, data entry is complete.

SHOW THAT A CLIENT STILL NEEDS HOUSING

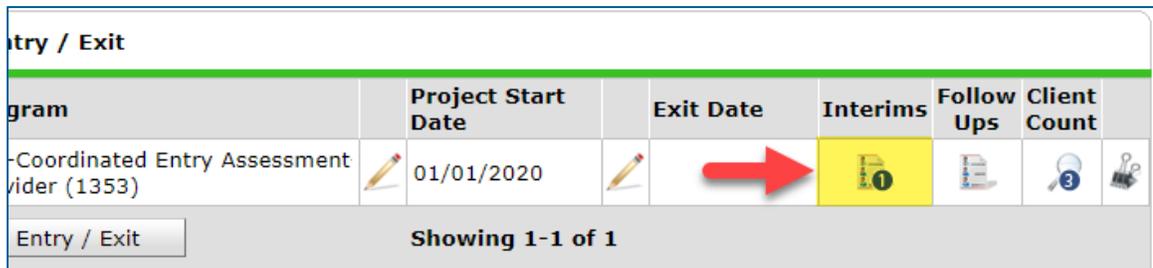
When a client was exited from a program without being housed and wants to continue to participate in Coordinated Entry, follow the directions below to return them to the Priority List.

In this section, you will...

- ✓ 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.



Program	Project Start Date	Exit Date	Interims	Follow Ups	Client Count
-Coordinated Entry Assessment Provider (1353)	01/01/2020				

Entry / Exit Showing 1-1 of 1

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.

Household Members

(234162) Two Parent Family

- (1001244) [blurred]
- (1002351) [blurred]
- (1001245) [blurred]

Interim Review Data

Entry / Exit Provider	ICA-Coordinated Entry Assessment-Training Provider (1353)
Entry / Exit Type	Basic
Interim Review Type *	Update ▼
Review Date *	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>

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

Coordinated Entry Event

	Start Date *	Event *	Location of Crisis Housing or Permanent Housing	Housing Provider Contact Name	Date Added
	01/01/2020	Referral to Other PH project/unit/resource opening	(1410) ICA ES HCC DHS OEO ESP Training Provider	John Doe	

Showing 1-1 of 1 records

- b. Under the section header **Client Exited Program without Housing**, make the most accurate selection for the question **If Not Housed, Reason**.
 - c. Add an **End Date**. This will return the client to the Priority List.

Client Exited Program without Housing

If Not Housed, Reason	-Select- ▼
End Date	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>

- d. Do not make any other updates to the referral. Click on **Save** to close the referral pop-up.
2. 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.

	Type		Project Start Date	Exit Date	Interims	Follow Ups	Client Cou
Provider (1917)	Basic		07/01/2019				
g Provider (3410)	Basic		06/30/2019				

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.

Household Members

(234162) Two Parent Family

(1001244) [blurred]

(1002351) [blurred]

(1001245) [blurred]

Edit Exit Data - (1001244) [blurred]

Exit Date *	<input type="text"/> / <input type="text"/> / <input type="text"/>
Reason for Leaving	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>
Destination *	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>

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.

The client's information should now appear on the Priority List. Contact your Priority List Manager or the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.

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.

In this section, you will...

- ✓ 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.

Entry / Exit							
Program		Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
Coordinated Entry Assessment Provider (1353)		01/01/2020	 				

Entry / Exit Showing 1-1 of 1

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.

Household Members

(234162) Two Parent Family

(1001244) [blurred]

(1002351) [blurred]

(1001245) [blurred]

Edit Exit Data - (1001244) [blurred]

Exit Date *	<input type="text"/> / <input type="text"/> / <input type="text"/>    <input type="text"/> : <input type="text"/> : <input type="text"/> <input type="text"/>
Reason for Leaving	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>
Destination *	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>

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.

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.

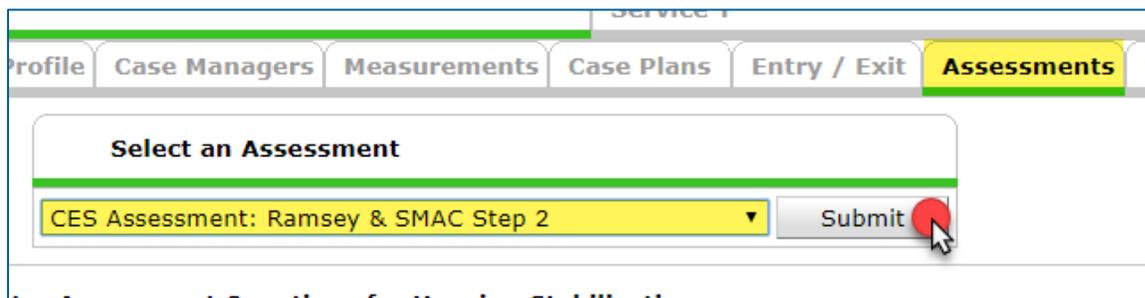
At this point, the client should no longer appear on the Priority List. Contact your Priority List Manager or the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.

APPENDIX A – VIEW A CLIENT’S MOST RECENT INFORMATION

While the Entry/Exit tab is the right place to enter assessment data, it’s not always the easiest place to find up-to-date details. Instead, it may be simplest to view a client’s most recent information within the **Assessments** tab.

ASSESSMENTS TAB

Review a person’s latest Coordinated Entry information by selecting the [Assessments](#) tab in their client record, then choosing the CES assessment used in your community. **Do not** enter data into the [Assessments](#) tab because that information may not appear on the Priority List.



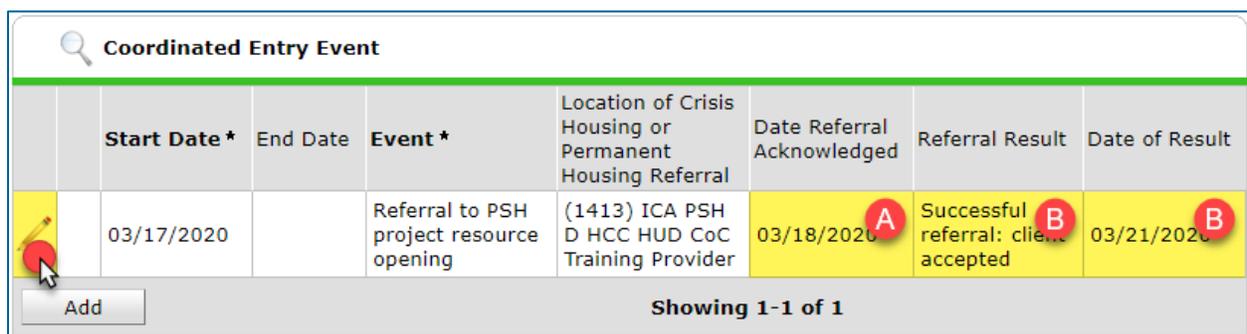
The screenshot shows a web interface with several tabs: Profile, Case Managers, Measurements, Case Plans, Entry / Exit, and Assessments. The Assessments tab is selected and highlighted in yellow. Below the tabs is a form titled "Select an Assessment". It features a dropdown menu with the text "CES Assessment: Ramsey & SMAC Step 2" and a "Submit" button. A red circle with a white arrow points to the Submit button.

After selecting the correct assessment from the drop-down, click on **Submit.*

DETERMINE A CLIENT’S REFERRAL STATUS

To check a person’s referral status, open their CES assessment in the [Assessments](#) tab. Then, find the [Coordinated Entry Event](#) sub-assessment and look for these markers:

- A. Housing providers enter a [Date Referral Acknowledged](#) when they first receive a referral.
- B. A [Referral Result](#) and [Date of Result](#) will be entered to mark a referral as successful or unsuccessful.



The screenshot shows a table titled "Coordinated Entry Event" with a search icon in the top left. The table has the following columns: Start Date *, End Date, Event *, Location of Crisis Housing or Permanent Housing Referral, Date Referral Acknowledged, Referral Result, and Date of Result. There is one row of data. A red circle with a white pencil icon (marker A) is over the Date Referral Acknowledged cell, and two red circles with white 'B' (marker B) are over the Referral Result and Date of Result cells. An "Add" button is at the bottom left, and "Showing 1-1 of 1" is at the bottom center.

Start Date *	End Date	Event *	Location of Crisis Housing or Permanent Housing Referral	Date Referral Acknowledged	Referral Result	Date of Result
03/17/2020		Referral to PSH project resource opening	(1413) ICA PSH D HCC HUD CoC Training Provider	03/18/2020	Successful referral: client accepted	03/21/2020

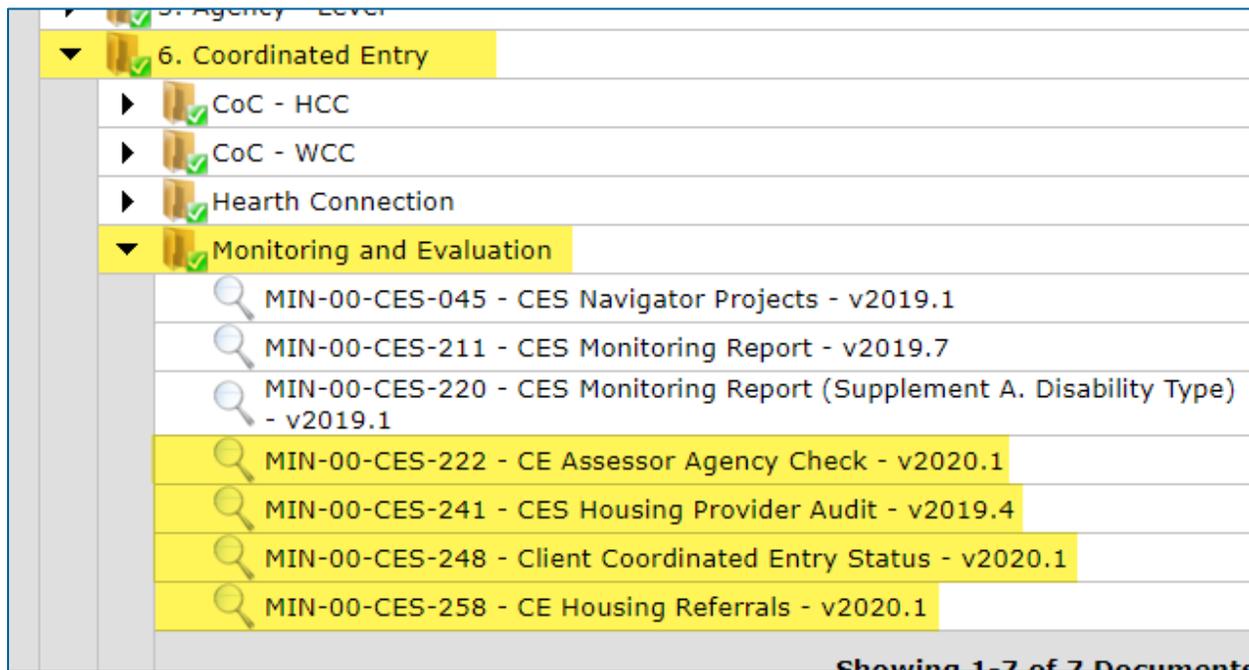
Click on the **edit pencil to see more referral details, like housing provider contact information. **Do not** enter data while in the **Assessments** tab.*

APPENDIX B – COORDINATED ENTRY REPORTS

ICA's Reporting and Evaluation Team has created a suite of reports that enables users to view clients' Coordinated Entry information.

There are four primary Coordinated Entry Reports that users should be aware of:

- [MIN-00-CES-222 - CE Assessor Agency Check Report](#): Assessors can use this report to check their data quality and see who they've added to the Priority List.
- [MIN-00-CES-241 - CES Housing Provider Audit](#): Housing providers can use this report to see their referral history.
- [MIN-00-CES-258 - CE Housing Referrals](#): Housing providers can use this report to view their pending referrals and resolved referrals for clients with open Coordinated Entry Assessment entries.
- [MIN-00-CES-248 - Client Coordinated Entry Status](#): This report is designed for shelter staff, case managers, outreach workers, assessors, and navigators to determine a client's Coordinated Entry status. The report shows whether a client was participating in Coordinated Entry and if they had a housing referral within the specified time frame.



The **Monitoring and Evaluation folder is home to several Coordinated Entry reports.*