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.

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

ACKNOWLEDGE A HOUSING REFERRAL

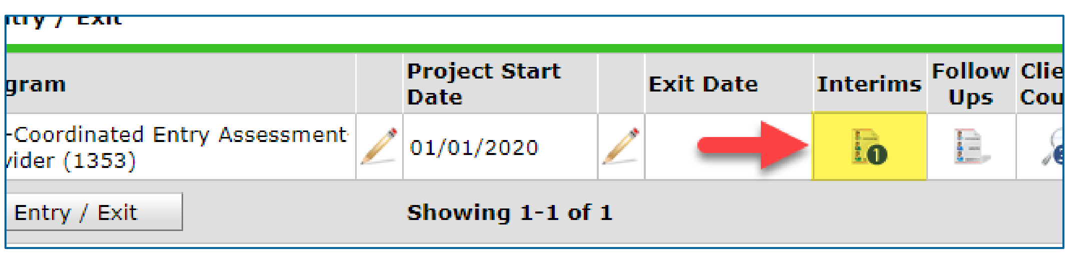
When a housing provider learns that they've been sent a referral, they should acknowledge that referral in HMIS. In the past, this step was called "provisional acceptance."

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.

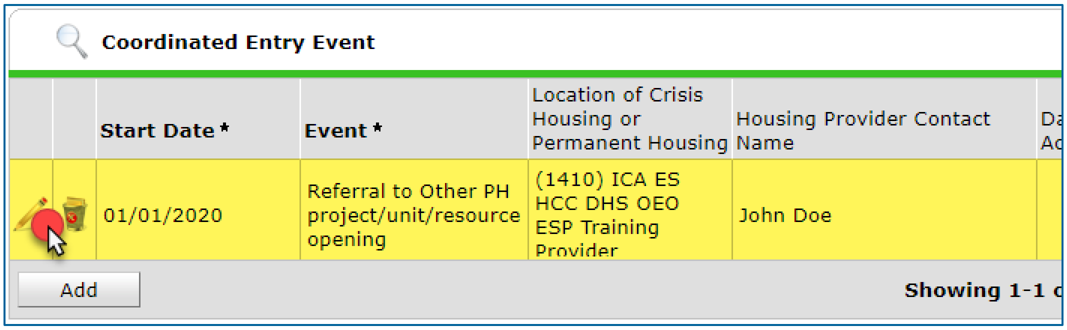


5. Select the following options in the Add Interim Review pop-up:
    a. Household Members: Check the box next to the name of every household member attached to the entry.
    b. Interim Review Type: Select **Update**.
    c. Review Date: The date you learned of the housing referral.
6. Click on **Save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

UPDATE A CLIENT'S HOUSING REFERRAL

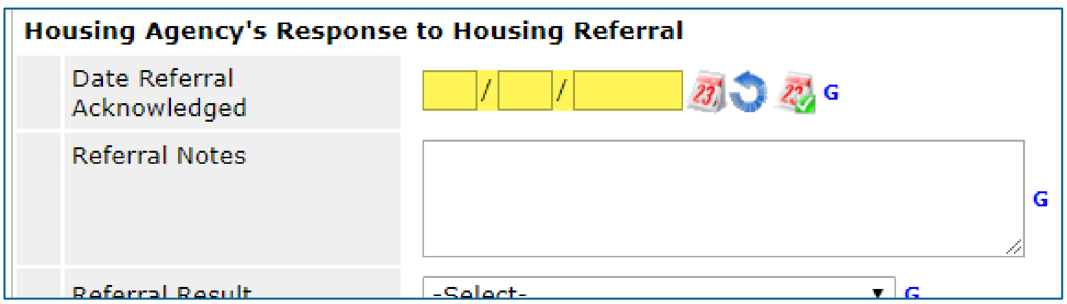
1. In the interim assessment, scroll down to the Coordinated Entry Event sub-assessment.

   a. Find the row that was created for your housing program and click its **edit pencil**.



   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.



   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

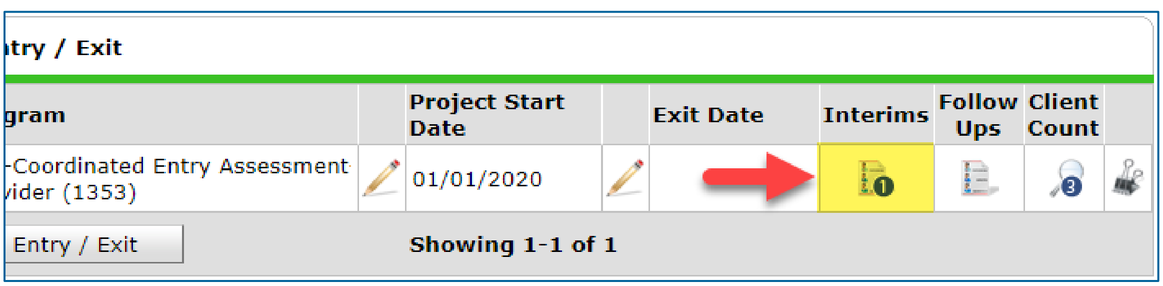
When a person's eligibility has been confirmed and you are prepared to enroll them in your housing program, you should mark their referral as **successful**.

In this section, you will…

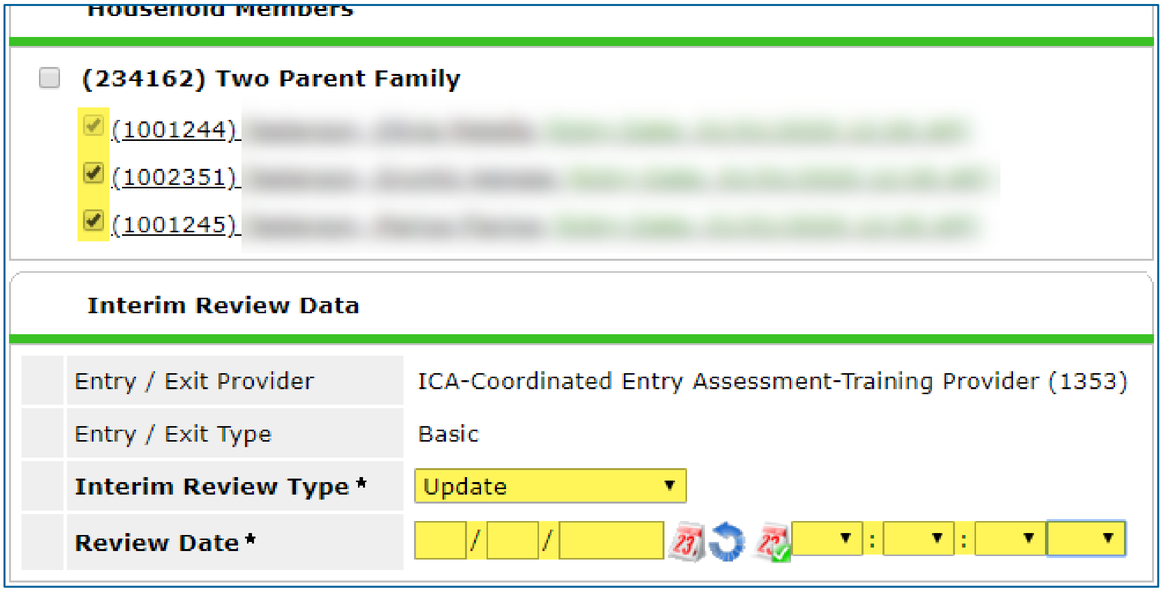
- Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- Update the client's referral in the Coordinated Entry Event sub-assessment.
- Add a new row to the Current Living Situation sub-assessment.
- Enroll the client in your housing program by creating a new Entry/Exit for your housing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



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.

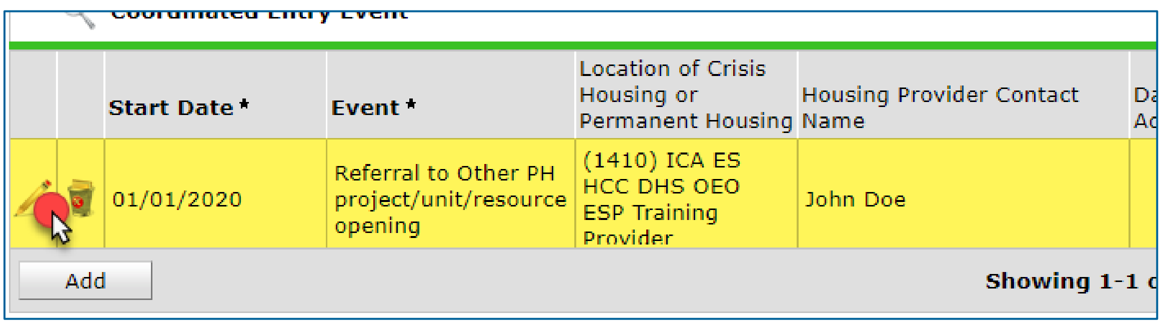


6. Click on **Save & Continue** to proceed to the interim assessment**.**

UPDATE A CLIENT'S HOUSING REFERRAL

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

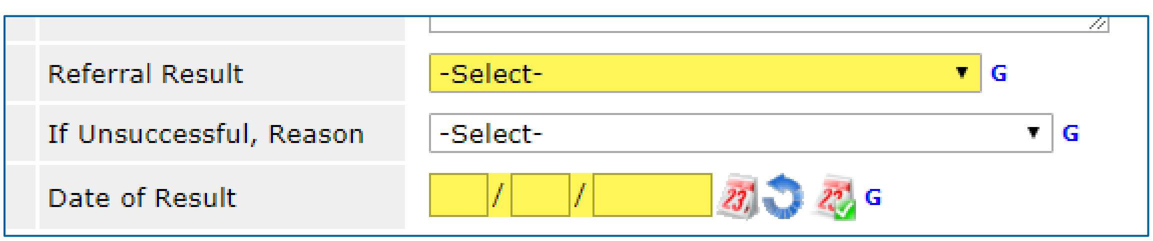
    a. Find your referral's row and click on its **edit pencil**.



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**.

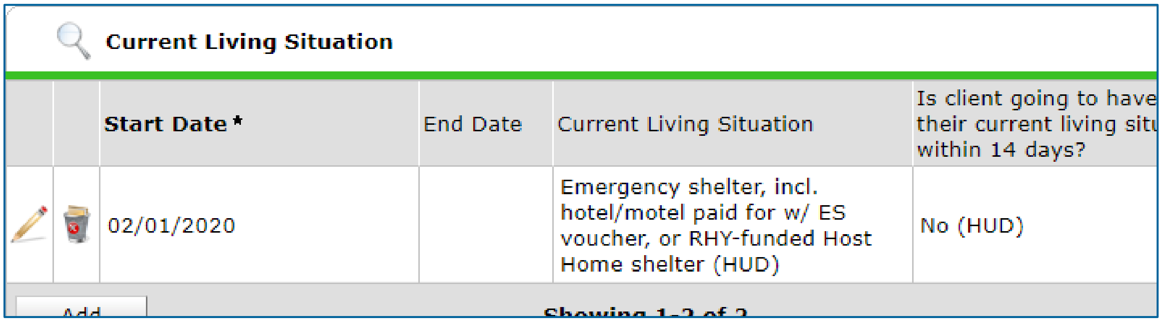
    c. Enter the Date of Result as the date the referral was successful.



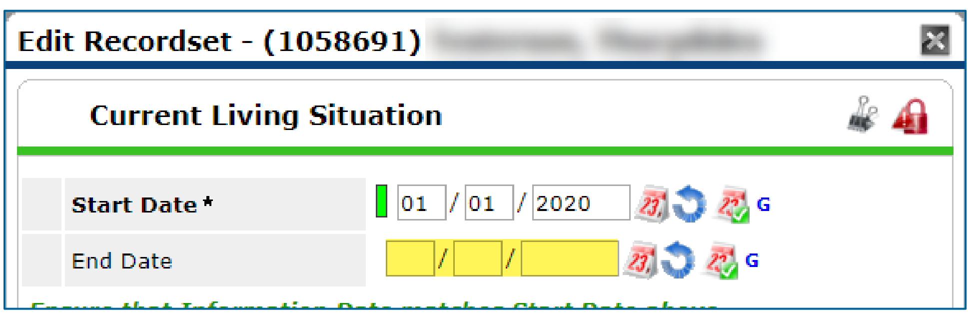
    d. **Do not** make any other updates to the referral. Click on **Save**.

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.

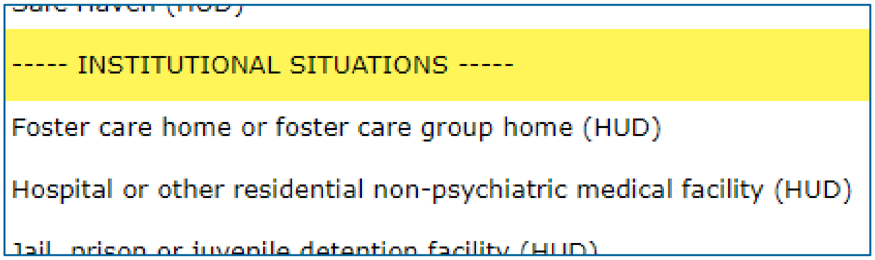


2. Click on the **magnifying glass** to open the sub-assessment pop-up.
3. Check for an active row without an End Date.
   a. If there is one, click on that row's **edit pencil**.
   b. In the Edit Recordset pop-up, enter an End Date that is **one day prior** to the referral result date, then select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

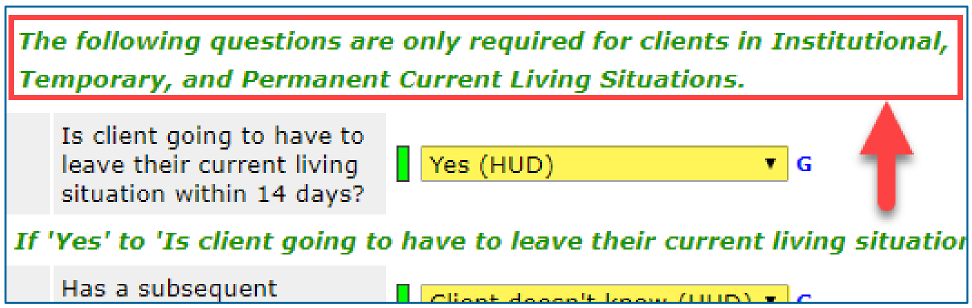


4. Click on **Add** and fill out the following fields:
   a. Start Date: Enter the date the referral was successful.
   b. Information Date: Same as the Start Date.
   c. Location Details: **[Optional]** Enter more detail about the client's location.
   d. Current Living Situation: Select the most accurate 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.



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.

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**.

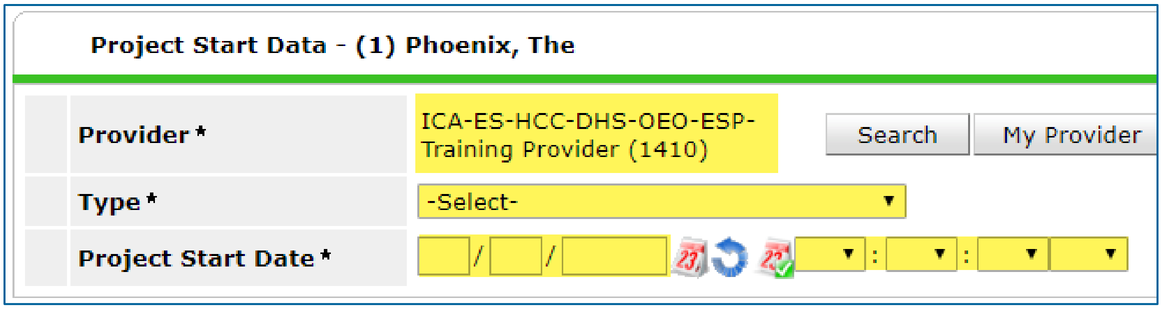
4. Select the following options in the Project Start Data pop-up:

   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

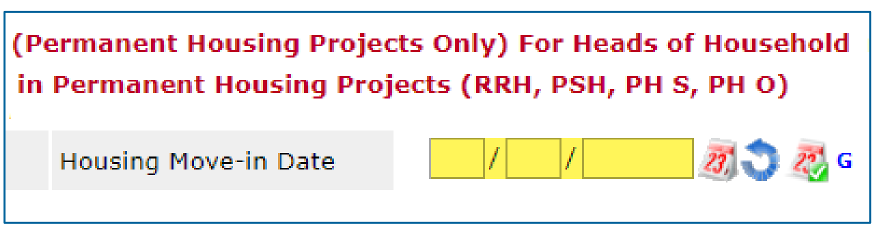
Complete the entry assessment for **all** members of the household.

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.

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

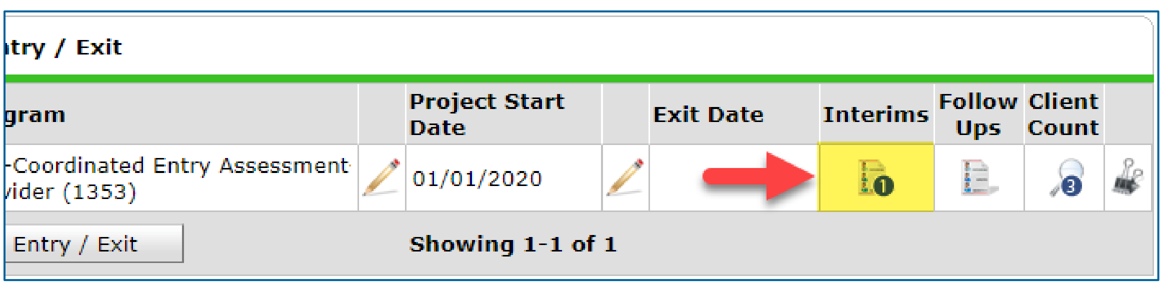
When a housing provider or client rejects a referral, the referral should be marked as "unsuccessful." In many cases, the client should be returned to the Priority List when a referral is unsuccessful. However, if a housing provider knows that the client should not be considered for future housing placements, 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…

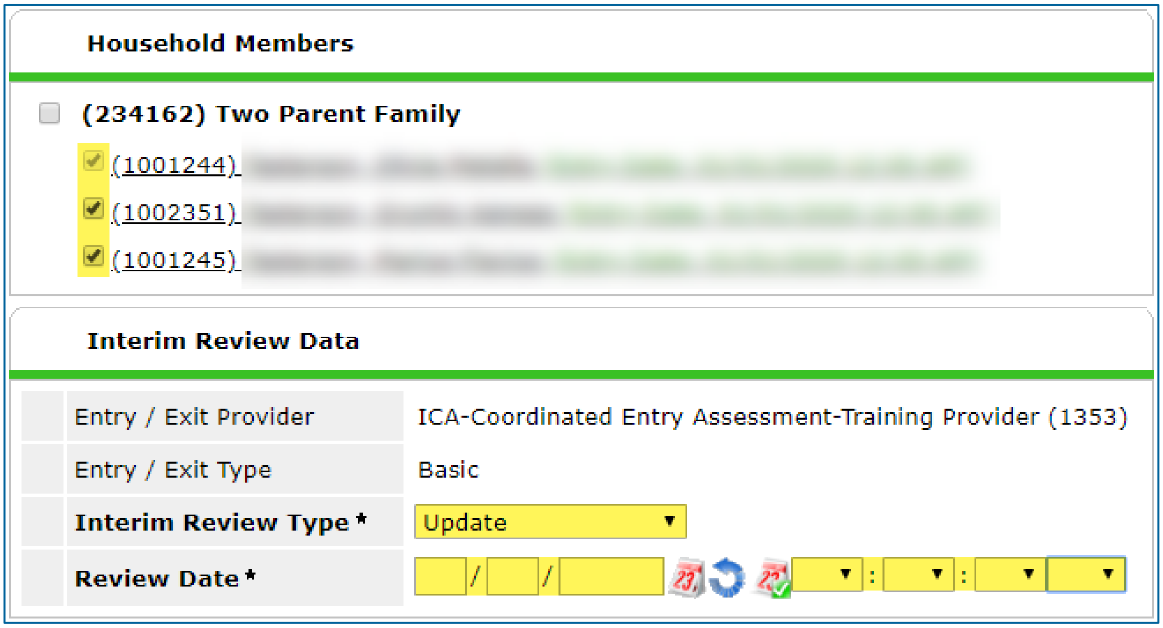
- Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- Add a new row to the Current Living Situation sub-assessment.
- Update the client's referral in the Coordinated Entry Event sub-assessment.

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.



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.

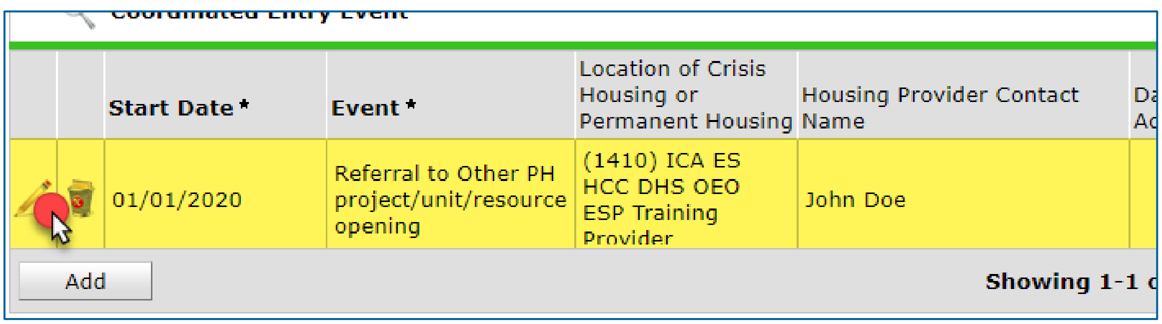


6. Click on **Save & Continue** to proceed to the interim assessment.

UPDATE A CLIENT'S HOUSING REFERRAL

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

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

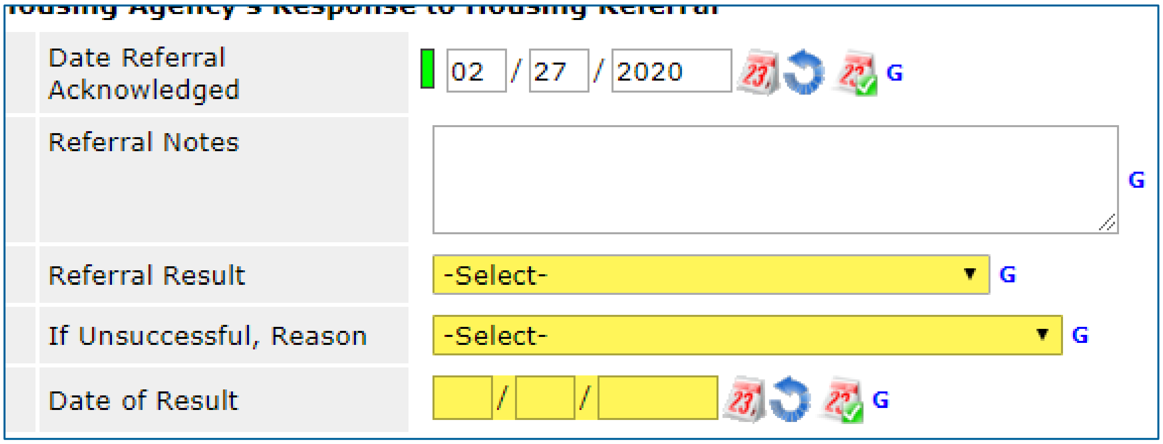


Check the **Start Date, **Location**, and **Housing Provider Contact** fields to find your housing program's referral.*

   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.

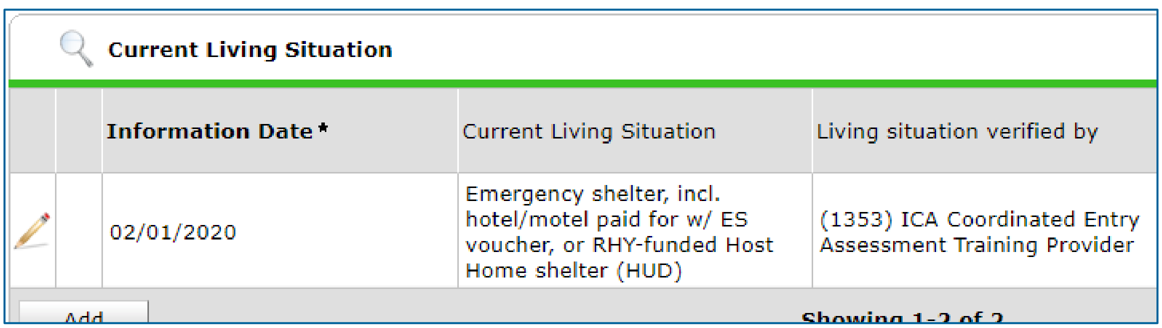
   d. Enter the Date of Result as the date the referral was unsuccessful.



e. **<u>Do not</u>** 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.

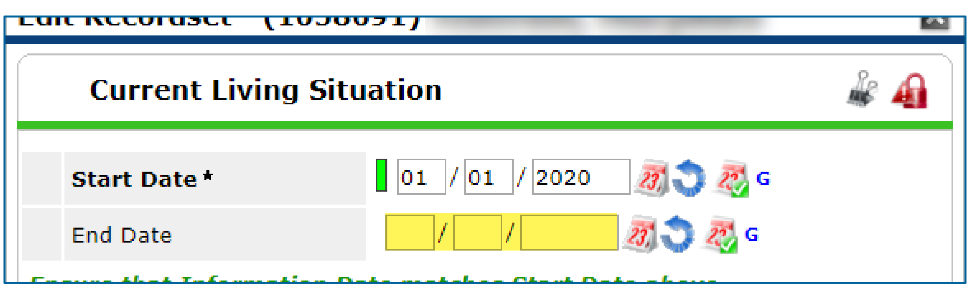


2. Click on the **magnifying glass** to open the sub-assessment pop-up.

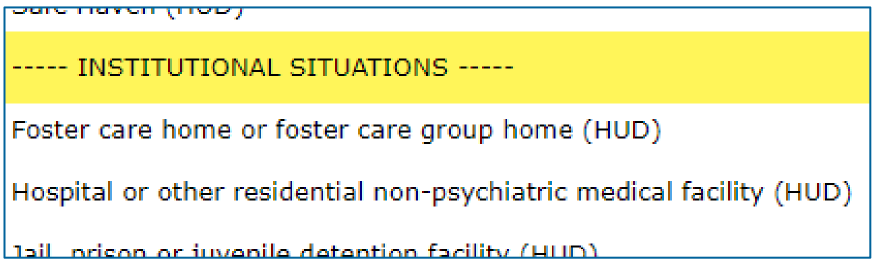
3. Check for an active row without an End Date.

    c. If there is one, click on that row's **edit pencil**.

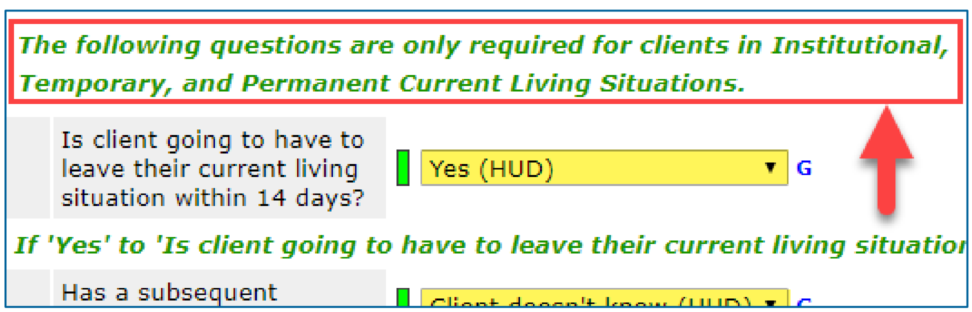
    d. In the Edit Recordset pop-up, enter an End Date that is **<u>one day prior</u>** to the referral result date, then select **Save**.



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

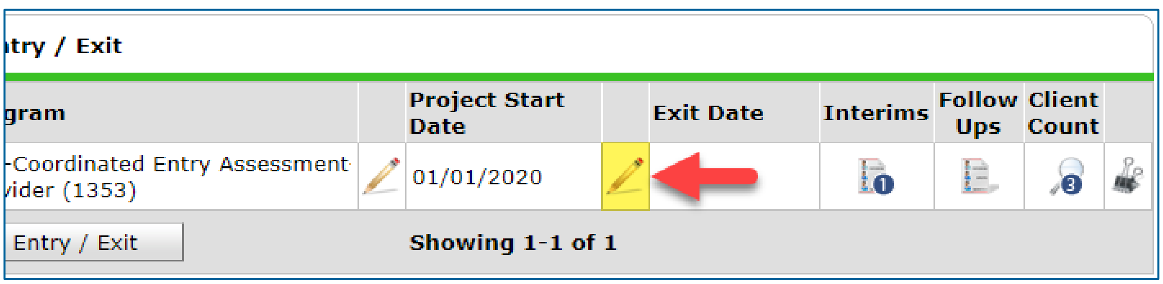
In certain circumstances, a client may be removed from the Priority List because they are no longer considered to be eligible for a placement in homeless-dedicated housing.

In this section, you will…

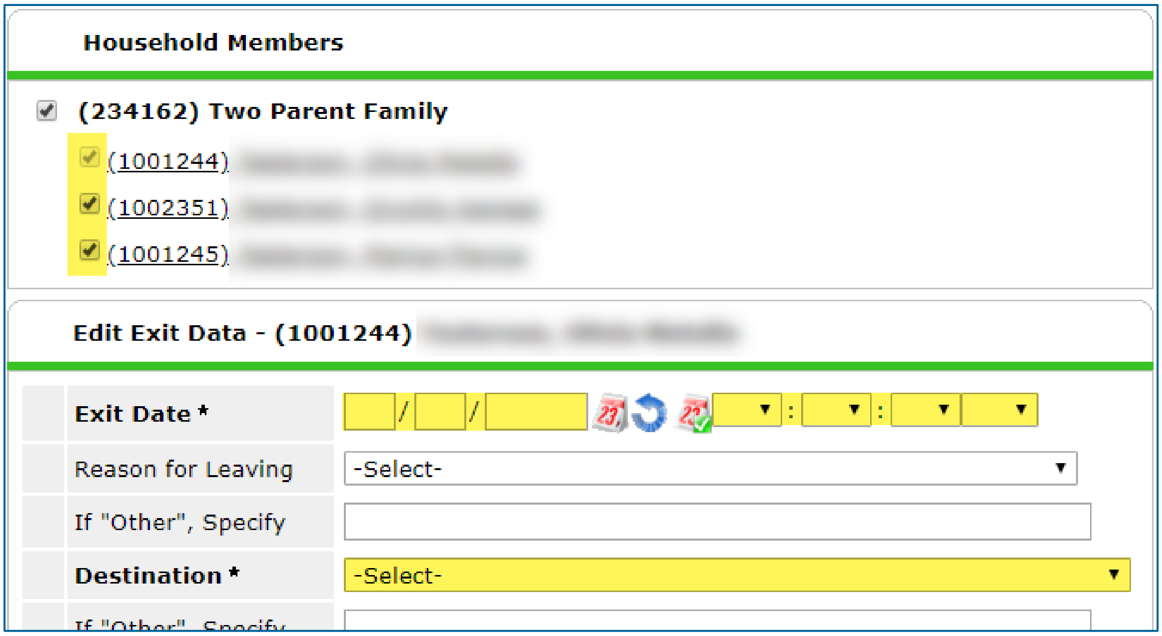
- Add exit data to the Coordinated Entry Assessment Entry/Exit.
- Fill out the exit assessment as completely and accurately as possible.

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.



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 **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.

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 <u>**either**</u> that a client has been housed <u>**or**</u> 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

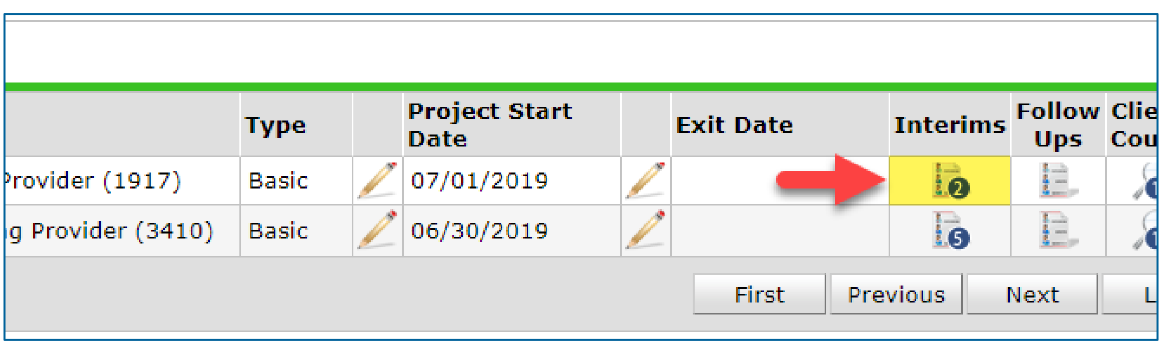
When a client has been housed, it is critical that a Housing Move-In Date be entered and that the client be removed from the Priority List. This will prevent them from being considered for future housing opportunities in place of someone who is still experiencing homelessness.

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.

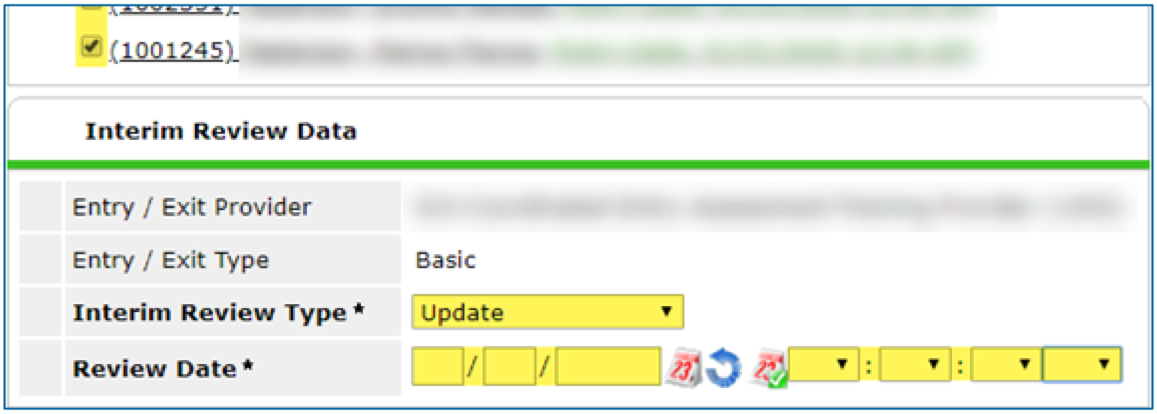


5. Select the following options in the Add Interim Review pop-up:

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

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

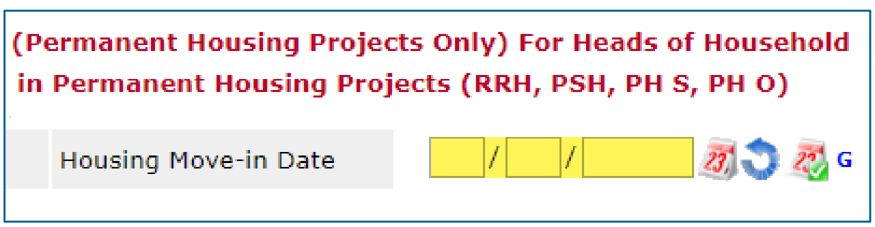
c. Review Date: The date the client moved into housing.



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.

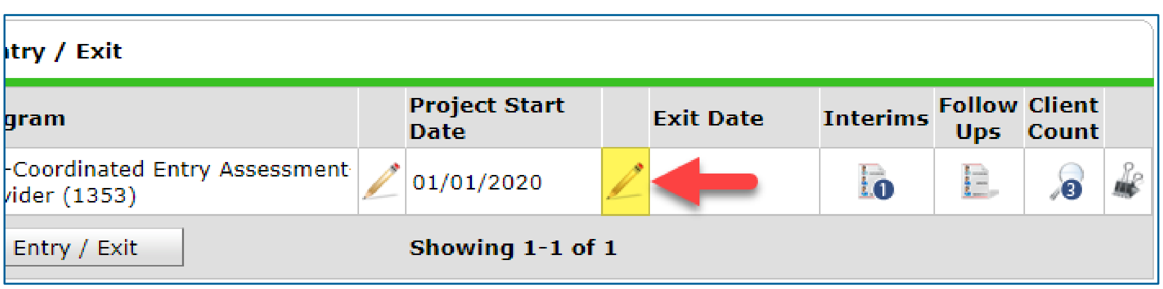


2. Scroll down to the bottom of the assessment and select **Save & Exit** to close it.

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.

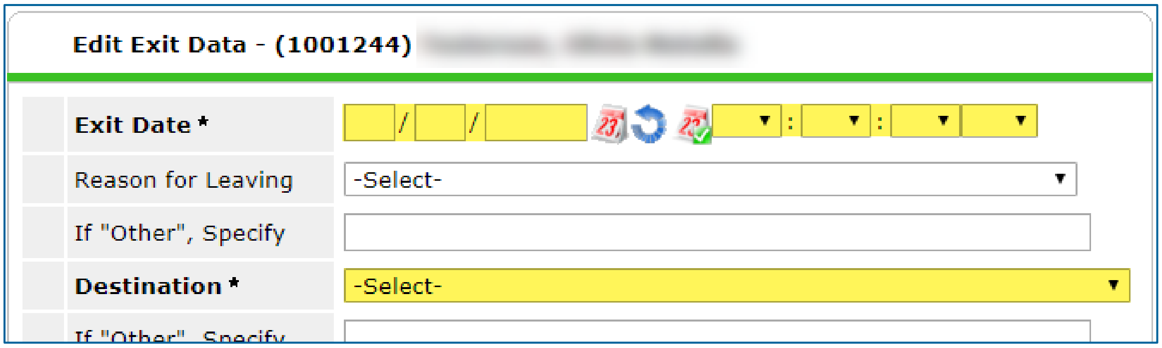


3. Fill out the following fields in the Edit Exit Data pop-up:

    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.

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

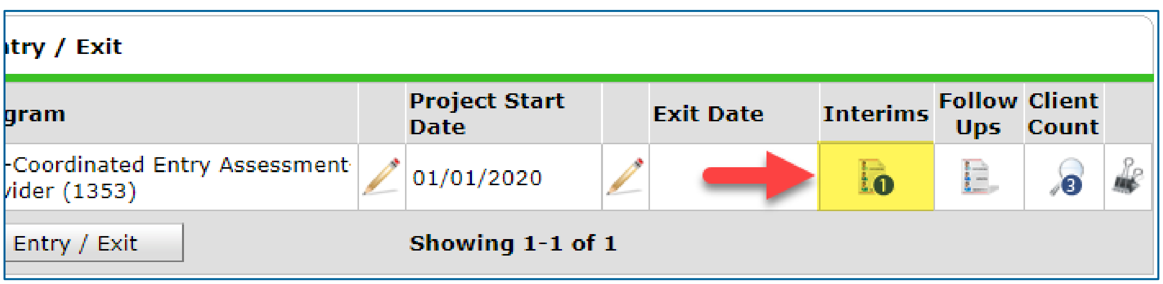
When a client was exited from a program without being housed and wants to continue to participate in Coordinated Entry, follow the directions below to return them to the Priority List.

In this section, you will…

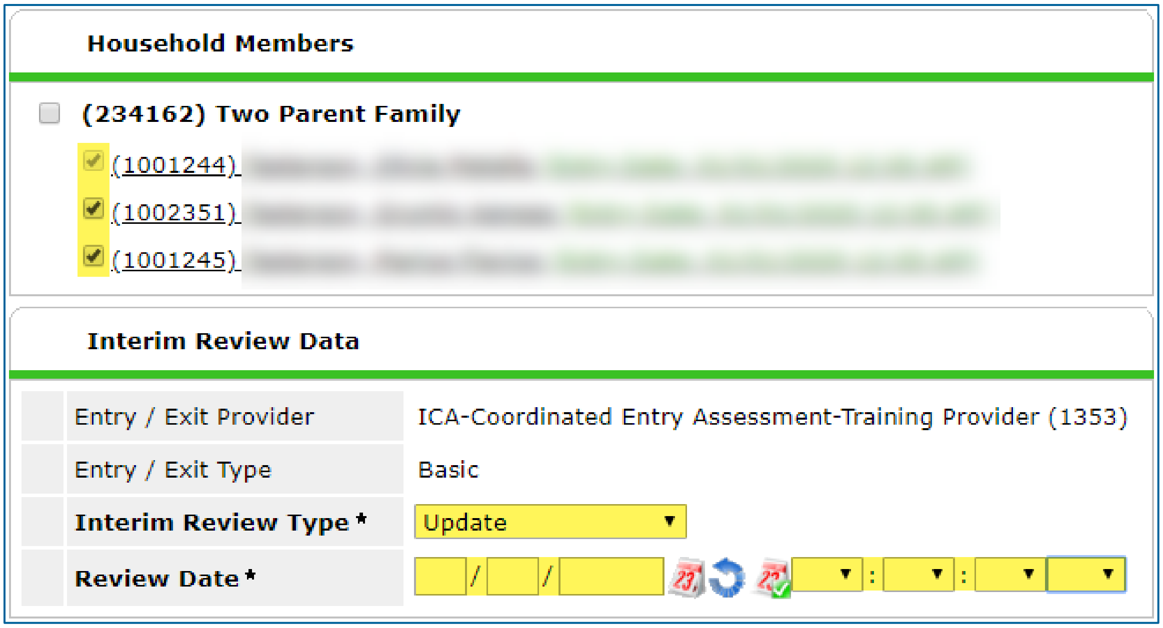
- ✓ Add an interim update to the Coordinated Entry Assessment Entry/Exit.
- ✓ Update the client's referral in the Coordinated Entry Event sub-assessment.
- ✓ Add exit data to the housing program Entry/Exit.
- ✓ Fill out the exit assessment as completely and accurately as possible.

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.



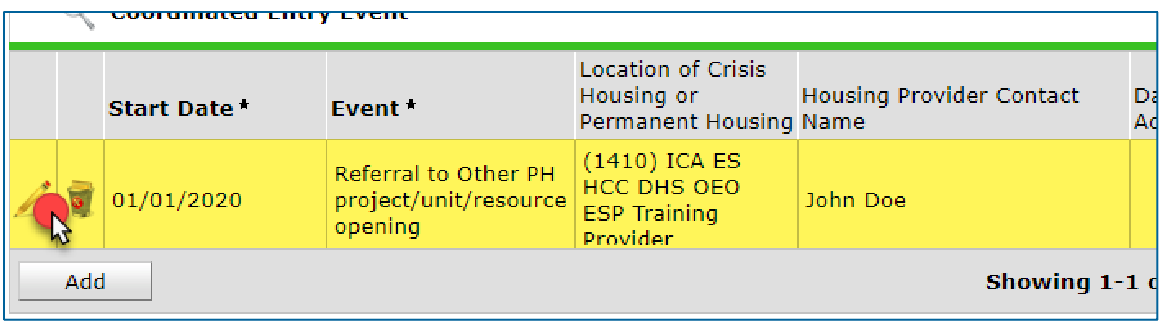
5. Select the following options in the Add Interim Review pop-up:
   a. Household Members: Check the box next to the name of every household member.
   b. Interim Review Type: Select **Update**.
   c. Review Date: The date the client is being returned to the Priority List.



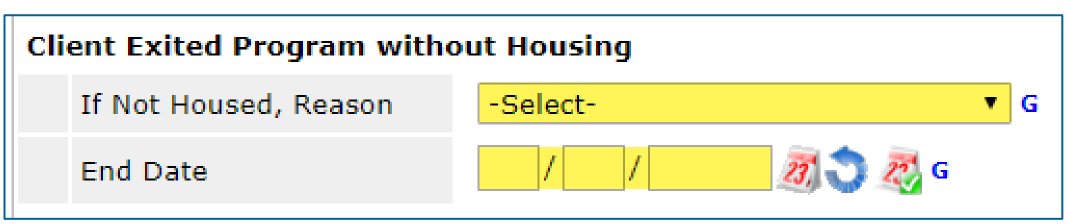
6. Click on **Save & Continue** to proceed to the interim assessment.

UPDATE A CLIENT'S HOUSING REFERRAL

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



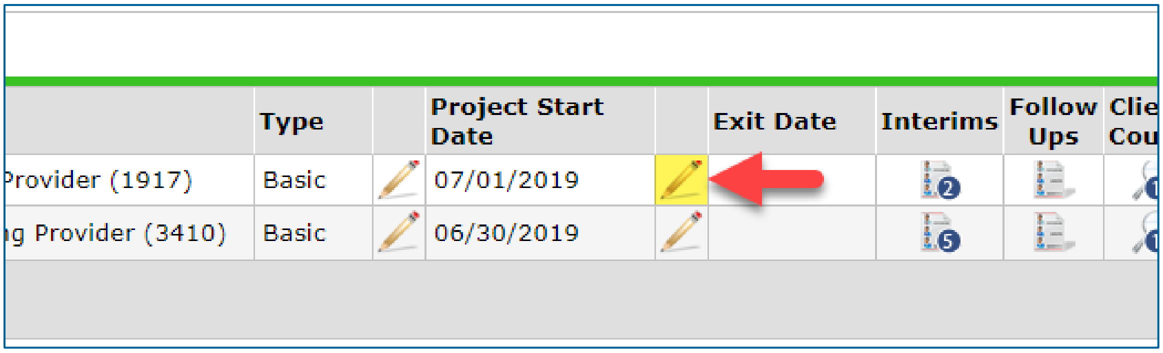
   b. Under the section header Client Exited Program without Housing, make the most accurate selection for the question If Not Housed, Reason.
   c. Add an End Date. This will return the client to the Priority List.



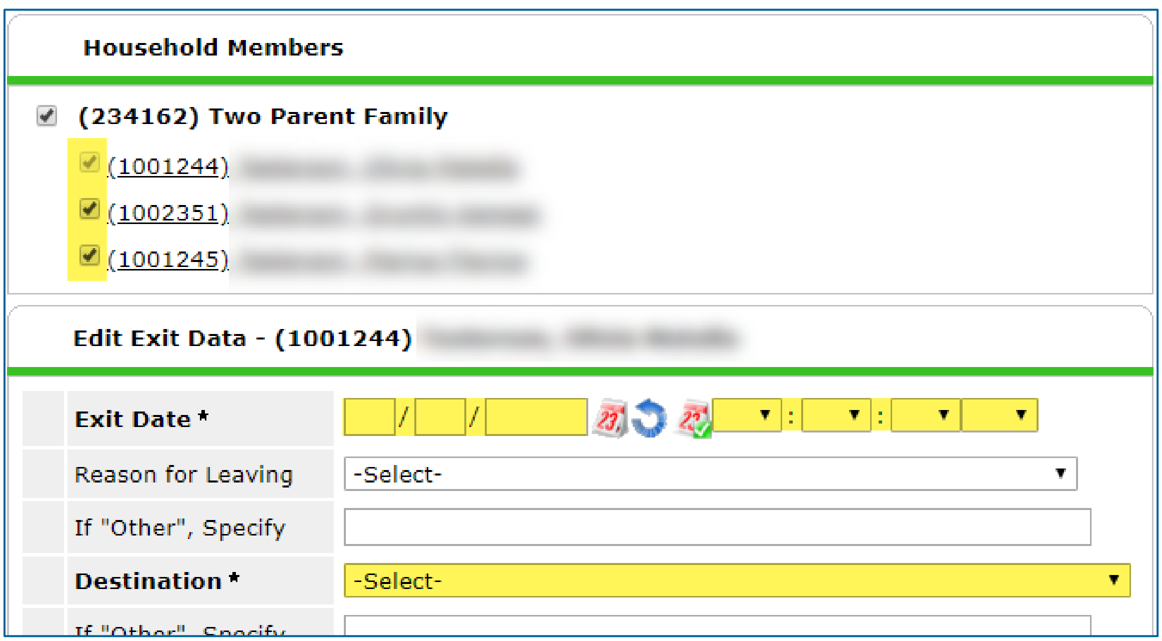
   d. <u>Do not</u> make any other updates to the referral. Click on **Save** to close the referral pop-up.
2. Scroll to the bottom of the interim assessment and select **Exit** to close it.

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.



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.

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

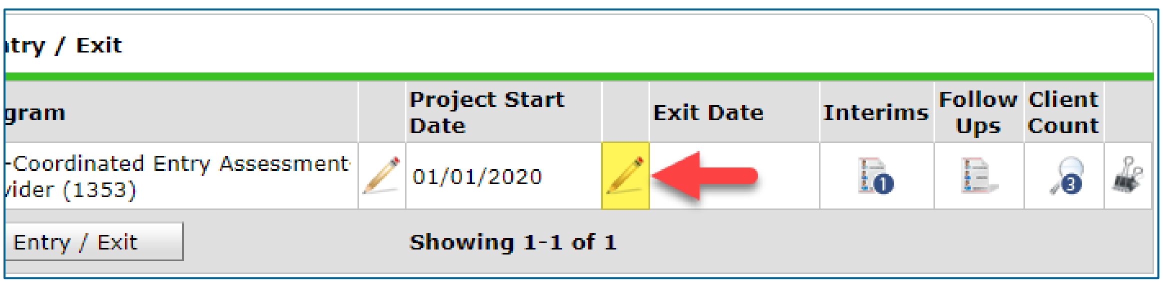
When a client was exited from a program without being housed and <u>will not</u> be participating in Coordinated Entry any longer, follow the directions below to remove them from the Priority List.

In this section, you will…

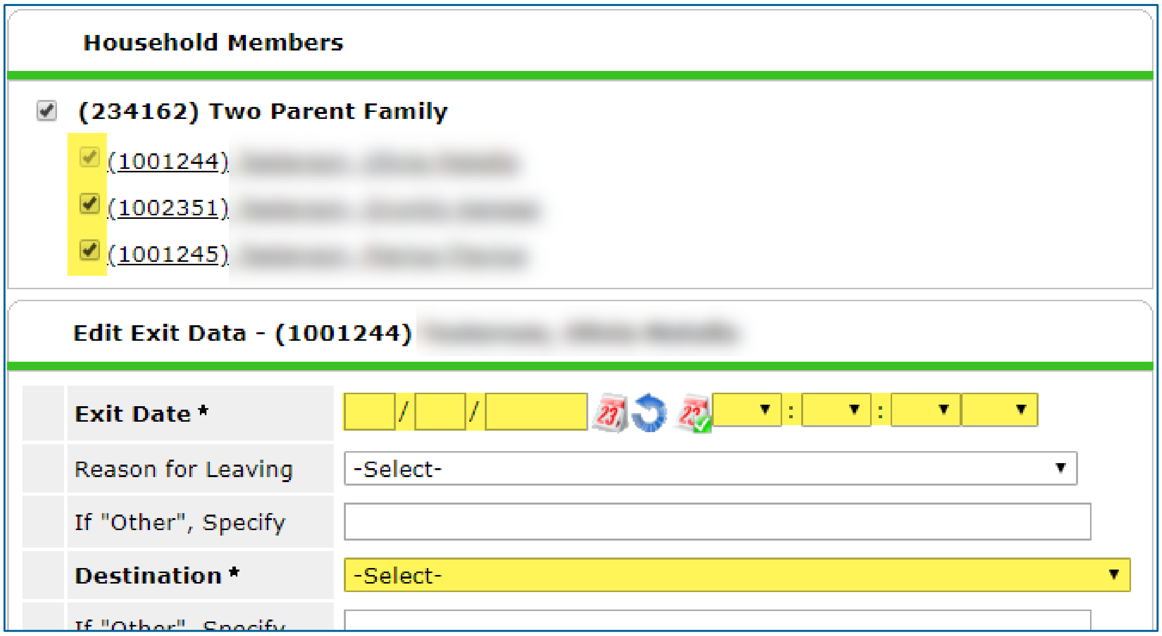
- ✓ Add exit data to the Coordinated Entry Assessment Entry/Exit.
- ✓ Fill out the exit assessment as completely and accurately as possible.

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.



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 **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.

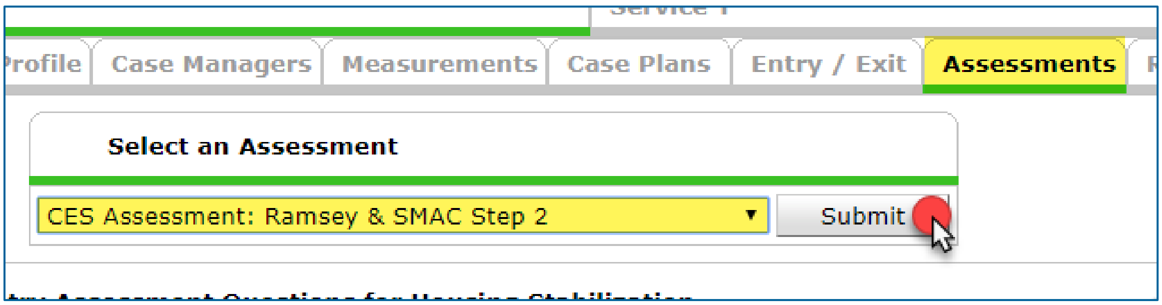
At this point, the client should no longer appear on the Priority List. Contact your Priority List Manager or the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.

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.



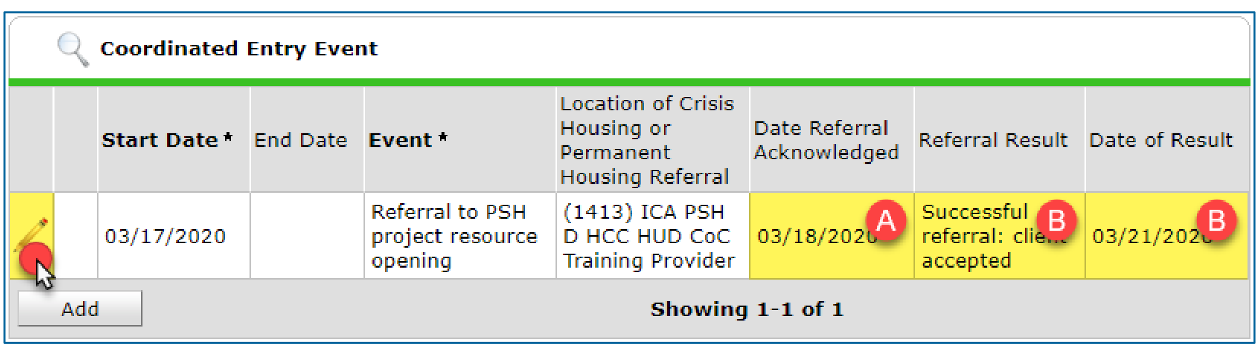
After selecting the correct assessment from the drop-down, click on **Submit.*

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.



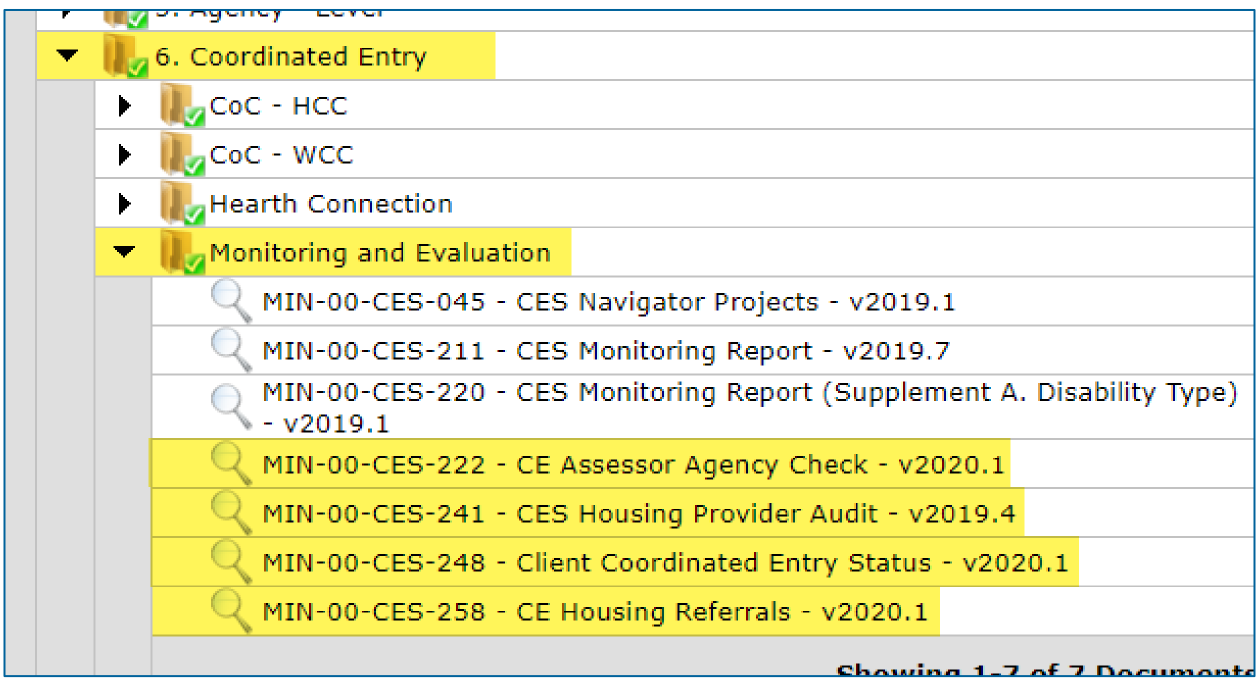
Click on the **edit pencil to see more referral details, like housing provider contact information. **Do not** enter data while in the **Assessments** tab.*

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.*