

COORDINATED ENTRY IN MINNESOTA HMIS DATA ENTRY INSTRUCTIONS

Last Updated: May 11, 2017

Primary Audience: Access Points (Assessors) making referrals and Housing Agencies accepting referrals from the Coordinated Entry Priority List, and Access Points using HMIS to track “Step 1” in HMIS

Note: These instructions are general HMIS instructions in Minnesota. Your CoC may have supplemental instructions. Contact the HMIS Helpdesk at mnhmis@icalliances.org if you have questions about the data entry process for Coordinated Entry. Additionally, as we roll out Coordinated Entry in HMIS CoC-by-CoC, we continue to update these instructions to be most inclusive and helpful. When significant updates have applied, we will receive an email with an updated version.

CLIENT’S RECORD IN HMIS

RESPONSIBLE: ACCESS POINTS



A client must agree to participate in Statewide Data Sharing (a consented ROI) to be entered in HMIS for Step 1 or Step 2 of Coordinated Entry in HMIS. If, for example, you refer a CLOSED client record to the Priority List for Step 2, this client will not appear on the Priority List Report and will not be contacted for available housing. If the client does not agree to share, contact your Priority List Manager to understand how your CoC is tracking a Priority List outside of HMIS.

1. Click on “Enter Data As” (EDA) and select your Coordinated Entry Referrals provider.
2. In ClientPoint, fill out search prompts for client to see if a client record already exists.
 - a. If a client record already exists, make sure this is a shared client record (Alias field should say SHARED).
 - b. If no matching results, create a new client record. Fill in as many of the search prompts as you can before clicking on “Add New Client With This Information.” Remember to add SHARED to the Alias field as you are creating an “open” client record.
3. If you are not doing live or same day data entry, backdate to client’s referral date (in pop-up or by clicking on “Back Date”). (You should still be in the correct EDA mode to your Coordinated Entry Referrals provider.)



- *If client is being assessed for a second time, read section “Updating Assessment Data” to understand how to correctly update data elements on the CES Assessment(s).*
- *Not all CoCs will be using HMIS to track all clients at initial triage “Step 1.”*

1. Click on “Enter Data As” (EDA) and select your Coordinated Entry Referrals provider.
2. Enter the client’s record.
3. If you are not doing live or same day data entry, backdate to the information date (in pop-up or by clicking on “Back Date”).
4. In the Assessments tab, complete the *CES Assessment: Step 1* for the Head of Household or Single client only. Follow prompts throughout the assessment.
5. Click on Save.
6. Click on the Service Transaction tab.

7. Click on Add Service.

8. The Service Provider should be your Coordinated Entry Referrals provider.
9. The Start Date and End Date should be the same. Populate the End Date with the Start Date.
10. Select Information Services for Service Type.
11. Skip Provider Specific Service.
12. Click on Save & Continue.
13. Upon clicking Save & Continue, a new screen will load with a lot of different sections to add content. You can skip everything, including Need Status.
14. Click on Save & Exit.



If client is being assessed for a second time, read section “Updating Assessment Data” to understand how to correctly update data elements on the CES Assessment(s) to prepare for a new referral.

1. Click on “Enter Data As” (EDA) and select your Coordinated Entry Referrals provider.
2. Enter the client’s record.
3. If you are not doing live or same day data entry, backdate to the information date (in pop-up or by clicking on “Back Date”).
4. In the Assessments tab, complete the *CES Assessment: Step 2* for the Head of Household or Single client only. Follow prompts throughout the assessment.
5. The VI-SPDAT is entered directly on the *CES Assessment: Step 2*. Click Add to open the VI-SPDAT pop-up box. Complete all the questions, and click Save at the bottom. The VI-SPDAT will be automatically scored.
 - a. The appropriate VI-SPDAT will be available to you depending on your CoC’s needs. You only need to complete one based on the client you are serving.
 - If the client is being referred with other household members, complete the Family VI-SPDAT.
 - If the client is being referred as a single, complete the Single VI-SPDAT.
 - If the client is a youth, complete the TAY VI-SPDAT.
 - b. Remember! Only users trained through OrgCode or local CoC to use the VI-SPDAT may collect VI-SPDAT data from client.

VI-FSPDAT v2.0							
Start Date *	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	E. FAMILY UNIT	GRAND TOTAL
10/01/2016	1	0	3	2	5	4	15

Add

Showing 1-1 of 1

6. Click on Save.

Once you complete the *CES Assessment: Step 2*, you are ready to make a referral to the Priority List. **Even if the client is already part of a household in ServicePoint, just refer the Head of Household.** If you refer the entire household, acceptance of the referral by a housing agency requires you to accept each referral on each client record which is unnecessary and cumbersome.

7. Click on the Service Transactions tab. (You should still be in the correct EDA mode to your Coordinated Entry Referrals provider.)
8. Click on Add Referrals.
9. Select the service transaction type “Housing/Shelter” from the Service Code Quicklist, and then click Add Terms. It will look like nothing has happened, but if you scroll to bottom, you will see the service transaction type listed under Selected Needs.

Service Code Quicklist

Housing/Shelter (BH)

Add Terms

Service Code Look-Up

Add Terms & Go To Search Results

10. Select the provider under Referral Provider Quicklist to make a referral to the priority list. Select the Priority List and click on Add Provider. Again, it will appear that nothing has happened, but if you scroll down to Selected Providers, you’ll see your Priority List provider was added.

Referral Provider Quicklist

Provider: CoC Priority List Add Provider Bed Availability

11. The Needs Referral Date (date of referral) under Referral Data will be pre-populated with the system date, which should be set to the referral date.
12. Do not use the Referral Ranking drop down list.
13. Add the appropriate VI-SPDAT score by clicking on Search, then click the green plus next to their entry from the *CES Assessment: Step 2*.

VI-SPDAT v2.0

Provider	Start Date*	PRE-SURVEY	A. HISTORY OF HOUSING AND HOMELESSNESS	B. RISKS	C. SOCIALIZATION & DAILY FUNCTIONS	D. WELLNESS	E. FAMILY UNIT	GRAND TOTAL
Ollivanders-ES-CoC-Galleons (4106)	11/15/2016	2	0	0	2	4	3	11

Showing 1-1 of 1

VI-SPDAT Score: 11 Recorded using VI-SPDAT v2.0 on 11/15/2016 by Ollivanders-ES-CoC-Galleons (4106) Search Clear

14. This is not required for correct reporting. You can set a Projected Follow Up Date and Follow Up User. A Follow Up User needs to be an HMIS User. If your name does not appear in the drop-down, you may need to first select your default or home provider. (The provider you "sit" at in the system.) Your CoC can decide how to use this, if at all. Example: If you need to follow up with referred clients two weeks after the referral, you can set the follow up date for two weeks after and a notification will appear on the selected user's HMIS homepage.
15. Check the box, if it is not already checked, by the service transaction type in the Referrals section.

Referrals Send Summary

Referred-To Provider	Housing/Shelter	Referred Clients
CoC Families Coordinated Entry (4105)	<input checked="" type="checkbox"/>	(270) Potter, Harry

16. Date of Need should be the same as Referral Date (Needs Referral Date).
17. Set the Need Status/Outcome column under Selected Needs to Identified in first drop-down and Service Pending in second drop-down.

Need Data

Date of Need*: 10 / 01 / 2016 12 : 00 : 00 AM

Selected Needs

Need	Amount if Financial	Need Status / Outcome / If Not Met, Reason	Notes
Housing/Shelter (BH)		Identified Service Pending	

Remove All Needs

18. Click Save ALL.
19. Under the Entire Service History tab, you should now see a Need and Referral. The client will now appear on your Priority List report.

All Service Transactions

Select Dates	Start Date	End Date				
-Select-	/ /	/ /				Search
Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal	
Need	02/28/2017	SMOC-SWC-Coordinated Entry Referrals	Housing/Shelter	Closed / Fully Met		
Referral	02/28/2017	SWC CES Priority List	Housing/Shelter			

1. Click on “Enter Data As” (EDA) and select your Coordinated Entry Referrals provider.
2. Enter the client’s record.
3. If you are not doing live or same day data entry, backdate to the information date (in pop-up or by clicking on “Back Date”).
4. In the Assessments tab, make appropriate updates on the *CES Assessment: Step 2*.

Updating text boxes or drop-down menus

Note: It is particularly important to update contact information so that housing agencies accepting a referral can have the most updated information.

- a. Simply overwrite the previous answer to update the response.

Drop-Down

Text Box

History - Household Size: Total # of Persons				
Date Effective	User Adding	Provider Adding	Value	
03/12/2017 12:00:00 AM	Laura Birdsong	SMOC-SWC-Coordinated Entry Referrals	7	
03/01/2017 12:00:00 AM	Laura Birdsong	SMOC-SWC-Coordinated Entry Referrals	6	

- b. If the previous answer was entered in error, delete the incorrect answer by clicking on the history bar and clicking on the trash can.

History - Household Size: Total # of Persons				
Date Effective	User Adding	Provider Adding	Value	
03/12/2017 12:00:00 AM	Laura Birdsong	SMOC-SWC-Coordinated Entry Referrals	7	
03/01/2017 12:00:00 AM	Laura Birdsong	SMOC-SWC-Coordinated Entry Referrals	6	

Updating sub-assessments

For some sub-assessments (tables throughout the assessment), it is important to “END” previous answers that are no longer accurate so that they do not appear on the Priority List Report. You do NOT, however, need to update all sub-assessments with an end date as some entries won’t change.

Sub-assessments with responses you do NOT need to “END”

- Housing Summary
- CES Date Tracking
- Vi-SPDAT

Sub-assessments with responses you DO need to “END” (as available)

- Assessor Info – Step 1
- Assessor Info – Step 2
- CoC Preferences
- Housing Preferences
- Current Case Manager
- Legal Involvement
- Barriers to Housing
- Monthly Household Income
- Demographic Information of Children in Household
- Household Disability Information

- a. Click on the Edit Pencil for the line item you want to end.

- b. Add an End Date and click Save.

- c. In order to delete a sub-assessment entry that was created in error, you need to have “created” or entered the data in order to delete the record set. If the record set was entered by another agency you will most likely not be able to delete that record.

Updating a VI-SPDAT

- a. If you re-assessed a client, you’ll create a NEW VI-SPDAT on the *CES Assessment: Step 2*. You then will need to update the referral VI-SPDAT score you previously entered.
 - Go to the Service Transaction tab and click on the tile for Entire Service History. Find the correct referral and click on the Edit Pencil on the left.
 - Under the Referral Data section, find the VI-SPDAT score. Click on search, then click on the green plus sign to add the new score. Then click Save and Exit to update the referral.
- b. If you need to update an existing VI-SPDAT due to error, click the edit pencil next to the VI-SPDAT.
 - If you entered some data in error, you’ll want to add the correct answer and delete the previously entered wrong answer by clicking on the history bar.

- Click on Save. The new score will automatically update on the referral so you do not need to re-attach the VI-SPDAT if you only edited the previously attached VI-SPDAT.
5. The updated data will be available for the Priority List Report following the next ART upload.



Your CoC may have a process in place for an assessor or client that wants to make an appeal to the generated VI-SPDAT score. Once approved, these are the steps you will take in the database to have the Priority List pull a manually entered VI-SPDAT score instead of the automatically generated VI-SPDAT score.

1. Click on "Enter Data As" (EDA) and select your Coordinated Entry Referrals provider.
2. Enter the client's record.
3. If you are not doing live or same day data entry, backdate to the information date (in pop-up or by clicking on "Back Date").
4. Click on the Assessments tab and view the *CES Assessment: Step 2*.
5. You do not need to delete or end a previously entered VI-SPDAT.

Start Date *	
	03/13/2017
	02/28/2017
	02/28/2017
<input type="button" value="Add"/>	

6. Click on the drop-down for the corresponding VI-SPDAT and select the new score.

Single - VI-SPDAT Score	-Select- ▼ G
Youth - VI-SPDAT Score	-Select- ▼ G
Family - VI-SPDAT Score	9 ▼ G
Does the client meet criteria for Tri-Morbidity as defined by the VI-SPDAT?	No ▼ G

7. If the client already has a referral to the Priority List with an auto generated score from the VI-SPDAT assessment, you'll need to remove that associated score. The Priority List report will only pull the manually entered score if there is not a VI-SPDAT score associated with the referral.
8. Click on the Service Transactions tab.
9. Click on "View Entire Service History."
10. Click on the Edit Pencil to the left of the referral you accepted to edit the referral status.

	Provider Creating	Need Type	Need Status
	SMOC-SWC-Coordinated Entry Referrals	Housing/Shelter	Identified

11. Click on Clear to remove the existing VI-SPDAT score from the referral record.

VI-SPDAT Score	13 Recorded using VI-SPDAT for Individuals v2.0 on 03/21/2017 by SMOC-SWC-Coordinated Entry Referrals (4238)	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
TAY-VI-SPDAT Score	Please Select a TAY-VI-SPDAT Score	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
VI-FSPDAT Score	Please Select a VI-FSPDAT Score	<input type="button" value="Search"/>	<input type="button" value="Clear"/>

12. Click on Save & Exit.

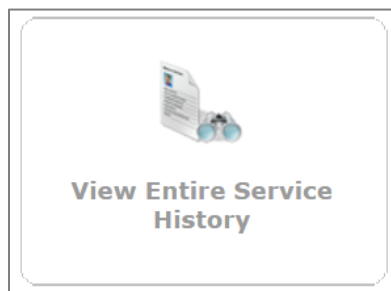
If you are provisionally accepting a referral because you have a housing opening, then you will want to follow these steps.

1. Click on “Enter Data As” (EDA) and select your project provider (the project that has an opening the client may be filling at your agency) to enter EDA mode.
2. Open the client’s record for the client you are going to accept from the priority list.
3. Do not backdate. You will use today’s date as that is the day you will be removing the client from the Priority List. This may be different than the date your Priority List Manager initially contacted you with a referral as your action is required to remove the client from the list. You now have a referral pending for your housing opening.
4. Click on the Service Transactions tab.





The screenshot shows the 'Client Information' header with several tabs: Summary, Client Profile, Households, ROI, Entry / Exit, Case Managers, Case Plans, Measurements, and Assessments. The 'Service Transactions' tab is highlighted with a red box, and a red arrow points to it from the right.

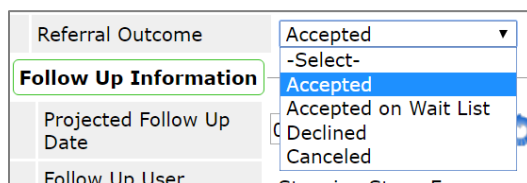
5. Click on “View Entire Service History” to bring you to the Entire Service History tab.



6. Click on the Edit Pencil to the left of the referral you want to accept.

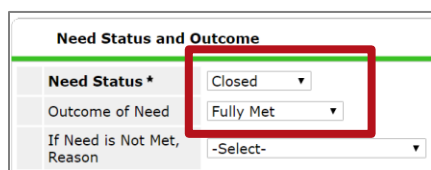
All Service Transactions							
Select Dates		Start Date		End Date		Search	
-Select-		/ /		/ /			
	Transaction Type	Date	Provider		Type	Need Status / Outcome	
	Need	02/28/2017	SMOC-SWC-Coordinated Entry Referrals		Housing/Shelter	Closed / Fully Met	
	Referral	02/28/2017	SWC CES Priority List		Housing/Shelter		

7. Change the referral outcome to Accepted.



The screenshot shows a 'Referral Outcome' dropdown menu. The 'Accepted' option is selected and highlighted in blue. Other options visible include '-Select-', 'Accepted on Wait List', 'Declined', and 'Canceled'.

8. Select Closed for Need Status, and Fully Met for Outcomes.



The screenshot shows the 'Need Status and Outcome' form. The 'Need Status' dropdown is set to 'Closed' and the 'Outcome of Need' dropdown is set to 'Fully Met'. Both dropdowns are highlighted with a red box.

9. Click on Provide Service.

Service Information

Provide Service

i A Service has not yet been provided for this Referral.

10. Service Provider should already be filled out as your project provider provisionally accepting the referral (as you are instructed to be in EDA mode to this provider). This matters for the Priority List report so that the Priority List knows which agency and program picked up the referral.
11. The End Date can be same as Start Date. Again, the Start Date and End Date will be today's date as that is the day you will be removing the client from the Priority List.
12. Service Type: Housing/Shelter (You can click on Make Service same as Need to populate Service Type as Housing/Shelter)
13. Skip Provider Specific Service.

Service Provider * Ollivanders-ES-CoC-Galleons (4106)
 Creating User Laura Birdsong

Start Date * 03 / 18 / 2017 12 : 00 : 00 PM

End Date 03 / 18 / 2017 12 : 00 : 00 PM

Service Type * Make Service same as Need
 Housing/Shelter (BH)

Provider Specific Service -Select- ▼

14. Click on Save & Continue.
15. Upon clicking Save & Continue, a new screen will load with a lot of different sections to add content. You can skip everything.
16. Click on Save & Exit.
17. You have now provisionally accepted the referral. The client will no longer appear on the Priority List.

All Service Transactions							
Select Dates		Start Date		End Date			
-Select- ▼		<input type="text"/> / <input type="text"/> / <input type="text"/>		<input type="text"/> / <input type="text"/> / <input type="text"/>		<input type="button" value="Search"/>	
		Transaction Type	Date	Provider	Type	Need Status / Outcome	Need Goal
		Need	02/28/2017	SMOC-SWC-Coordinated Entry Referrals	Housing/Shelter	Closed / Fully Met	
		Referral	02/28/2017	SWC CES Priority List	Housing/Shelter		
		Service	03/21/2017	Heartland-PH RRH-SWC KANDI-HUD-ESG-DHS OEO-Rehousing	Housing/Shelter		

UPDATES BETWEEN PROVISIONAL ACCEPTANCE AND ENROLLMENT RESPONSIBLE: HOUSING AGENCY

Your CoC may want to track dates to better understand a client's experience from being pulled from the list to being housed. This information will be tracked on your *CES Assessment: Step 2*. This step may not apply to all CoCs, or your CoC may ask you to collect different data between provisionally accepting the referral and program enrollment.

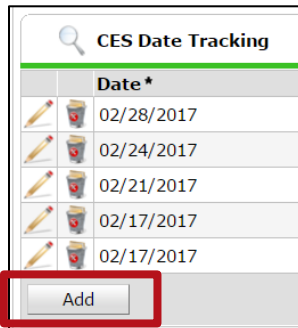
1. Click on "Enter Data As" (EDA) and select your project provider (the project that has an opening the client may be filling at your agency) to enter EDA mode.
2. Enter the client's record.
3. If you are not doing live or same day data entry, backdate to the information date (in pop-up or by clicking on "Back Date").
4. In the Assessments tab, open the *CES Assessment: Step 2*.
5. Click on Add in the CES Date Tracking sub-assessment towards the bottom of the assessment.

6. Add a record by answering the data elements in the pop-up.

Response Codes	Required or Optional
Priority List Manager contacts provider with referral	Optional; may be required by some CoCs (Responsible: Priority List Manager)
Provider first engages with client	Optional; may be required by some CoCs
Provider accepts client into project (eligibility confirmed)	Optional; may be required by some CoCs
Provider declines referral	Optional; may be required by some CoCs
Provider cancels referral	Optional; may be required by some CoCs
Client is housed	Required upon or after program enrollment (see next section)

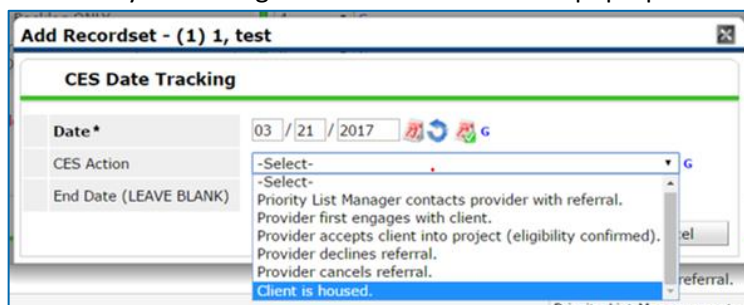
7. Click on Save in pop-up.

1. Click on “Enter Data As” (EDA) and select your project provider.
2. If you are not doing live or same day data entry, backdate (in pop-up or by clicking on “Back Date”) to the date the client enrolled in your project.
3. Open the client’s record.
4. Click on the Assessments tab to update or add any information to the *CES Assessment: Step 2*. You are required to update date client is housed on the CES Date Tracking sub-assessment.
5. Click on Add in the CES Date Tracking sub-assessment towards the bottom of the assessment.



CES Date Tracking	
	Date *
	02/28/2017
	02/24/2017
	02/21/2017
	02/17/2017
	02/17/2017
<input type="button" value="Add"/>	

6. Add a record by answering the data elements in the pop-up.



Add Recordset - (1) 1, test

CES Date Tracking

Date * 03 / 21 / 2017

CES Action

End Date (LEAVE BLANK)

-Select-
-Select-
Priority List Manager contacts provider with referral.
Provider first engages with client.
Provider accepts client into project (eligibility confirmed).
Provider declines referral.
Provider cancels referral.
Client is housed.



If the date housed is not the same as program enrollment (your Entry Date), you will need to return to the *CES Assessment: Step 2* to add the date housed later on.

7. Click on Save.
8. Complete regular data entry for your project provider.



Individuals accepted off the Priority List that DO NOT enroll in your program (were not housed) must be returned to the Priority List. If you accept a referral and your agency does not house the client, it is your responsibility to either (1) re-add the client to the priority list within the timeframe decided on by your CoC or (2) contact your Priority List Manager. This varies by CoC.

1. Click on “Enter Data As” (EDA) and select your Coordinated Entry Referrals provider for your agency. (Your project provider that accepted the referral will not be setup to appropriately refer back to the Priority List.) You must have already accepted the referral (see previous section) in order to appropriately decline the referral.
2. You do not need to backdate.
3. Open the client’s record for the client you are going to re-add to the priority list.
4. Click on the Service Transactions tab.
5. Click on “View Entire Service History.”
6. Click on the Edit Pencil to the left of the referral you accepted to edit the referral status.
7. Change the Referral Outcome from Accepted to Declined. Select the Reason.

Referral Outcome	Declined ▼
If Canceled or Declined, Reason	Client Not Eligible ▼

8. Change the Outcome of Need to Not Met. Again, select the Reason.

Need Status and Outcome	
Need Status *	Closed ▼
Outcome of Need	Not Met ▼
If Need is Not Met, Reason	Client Not Eligible ▼

9. At the top of the page is a place to enter notes. This will be useful for others participating in your Coordinated Entry System. Click on the pencil the left of Need Information to get the Notes box.

Need Information	
Need	Housing/Shelter (BH)
Provider	Ollivanders-ES-CoC-Galleons (4106)
Date of Need	11/21/2016 02:21:34 PM
Amount if Financial	No amount entered.
Notes	No notes entered.

Need Information

Provider * Ollivanders-ES-CoC-Galleons (4106) Search My Provider Clear

Need * Housing/Shelter (BH) Look Up

Date of Need * 11 / 21 / 2016 🔄 🕒 2 : 21 : 34 PM 📅

Amount if Financial

Notes

Need Status * Closed ▼

Outcome of Need Fully Met ▼

If Need is Not Met, Reason -Select- ▼

10. Click on Save and Exit.

11. Follow steps under “Intake ‘Step 2’ in HMIS; Refer a Client to the Priority List” starting at step #7 to re-add the client to the Priority List. You will stay in EDA to your Coordinated Entry Referrals provider for these steps and can now back date to the original referral date. Use the original referral date when you create a new referral as this may be used as a tie breaker with clients that have the same prioritization ranking.

All Service Transactions							
Select Dates		Start Date		End Date			
-Select- ▼		<input type="text"/> / <input type="text"/> / <input type="text"/> 🔄 🕒 📅		<input type="text"/> / <input type="text"/> / <input type="text"/> 🔄 🕒 📅		Search	
				Transaction Type	Date	Provider	Type
				Need	11/19/2016	Gryffindor-TH-CoC-Galleons	Housing/Shelter
				Referral	11/19/2016	CoC Families Coordinated Entry	Housing/Shelter
				Need	11/15/2016	Ollivanders-ES-CoC-Galleons	Housing/Shelter
				Referral	11/15/2016	CoC Families Coordinated Entry	Housing/Shelter
				Service	11/18/2016	Gryffindor-TH-CoC-Galleons	Housing/Shelter
Showing 1-2 of 2							



Only cancel a referral if the client should not be returned to the priority list following your CoC's policies.

1. Click on "Enter Data As" (EDA) and select your Coordinated Entry Referrals provider.
2. You do not need to backdate.
3. Open the client's record for the client you are going to remove from the priority list.
4. Click on the Service Transactions tab.
5. Click on "View Entire Service History."
6. Click on the Edit Pencil to the left of the referral that you want to update.
7. Set the Referral Outcome to Canceled. Add the Reason.

Referral Outcome	Canceled ▼
If Canceled or Declined, Reason	Client Refused Service ▼

8. Click on Save and Exit.
9. This will remove the client from the live Priority List.