MINNESOTA’S COORDINATED ENTRY ASSESSOR DATA ENTRY 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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ASSESSMENT

The Priority List is used to prioritize clients for placement in housing programs. Assessors are asked to accurately and completely fill out the Coordinated Entry assessment so that the best possible referrals can be made by Priority List Managers. Note: The term “client” will be used throughout this document to refer to a person experiencing homelessness.

ASSESS A CLIENT AND PLACE THEM ON THE PRIORITY LIST

Only clients who have completed an HMIS Release of Information and consented to share their information statewide can be added to an HMIS Priority List. If a client does not wish to share their data, contact your Priority List Manager to connect them with the non-HMIS Priority List.

In this section, you will...

- Find an existing record or create a new record for the client being assessed.
- Create a new Entry/Exit for the Coordinated Entry Assessment provider.
- Fill out the Coordinated Entry assessment as accurately and completely as possible.

FIND OR CREATE A CLIENT RECORD IN HMIS

1. Click on Enter Data As and select your Coordinated Entry Assessment provider.
2. Open ClientPoint and search for the client being assessed.
   - If a matching client record appears in the search results, verify that the record is shared before clicking on the client’s name: The Alias field should contain the word SHARED.
   - If there are no matching results, fill in as many of the search fields as possible before clicking on Add New Client With This Information.

*Client records with six-digit IDs are never shared records. Some records with seven-digit IDs are not shared either, depending on the client’s preferences.*
3. When prompted at the client record screen, enter the date of assessment into the Back Date Mode pop-up and click on Set New Back Date.
   
a. If doing same-day data entry, select Use Current System Date.

4. Select the Client Profile tab and check that the Client Record section is not missing information.
   
a. If you created the client record, type SHARED in the Alias field, then fill out the Universal Profile with all available information. Don’t forget to enter the Date of ROI Consent!

*Setting a new back date will temporarily change the system date. Any information you enter will be marked with that modified system date.

It is the responsibility of the agency with the first signed ROI to enter the date signed below. Do not override.

*The agency that creates a client record is responsible for entering the Date of ROI Consent when a client agrees to information sharing.
5. [Households Only] Select the Households tab and look for a household that has the correct members included.
   
   a. If there is no household with the correct composition, create a new one that includes everyone that will be added to the Priority List. **Do not** remove or delete members from an existing household!

   ![Household Members Table]

   b. When starting a new household, you may need to create client records for other members of the household. For more information about creating client records and managing households, refer to the resources on the Forms & Instructions page of the MN HMIS website or contact the Helpdesk at mnhmis@icalliances.org.

   Once a client record has been located or created for each member of the household, they can all be attached to the same Entry/Exit. Read on for instructions!

CREATE A NEW ENTRY/EXIT

1. Make sure that you are in EDA mode as your Coordinated Entry Assessment provider and have opened the record of the client you are adding to the Priority List.
   
   a. [Households Only] If you are adding a household to the Priority List, you should have the head of household’s record open.

2. Click on the Entry/Exit tab, then select Add Entry/Exit.

3. Make the following selections in the Project Start Data pop-up:
   
   a. Household Members: Check the box next to the name of every household member being added to the Priority List.
b. **Provider:** Your Coordinated Entry Assessment provider.

c. **Type:** Select **Basic**.

d. **Project Start Date:** The date the client was assessed.

4. Click on **Save & Continue** to proceed to the Coordinated Entry assessment.

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**FILL OUT A COORDINATED ENTRY ASSESSMENT**

1. Fill out the Coordinated Entry assessment as accurately and completely as possible, paying special attention to the following:

   **[Hennepin County Only] CES Release of Information Date**

   All clients participating in Hennepin County’s Coordinated Entry System must sign the Hennepin CES Release of Information (ROI). Enter the date this ROI was signed into the **CES Release of Information Date** field. A copy of the Hennepin ROI should be either uploaded to the client’s record in HMIS or stored at the assessor’s agency.

   ![CES Release of Information Date](image)

   *Note that the CES ROI is different than the HMIS ROI. The HMIS ROI asks a client whether they consent to have their information shared statewide.*

   **[Households Only] Head of Household**

   Enter assessment information for the head of household **only**.
COORDINATED ENTRY ASSESSMENT SUB-ASSESSMENT

This data element is used to capture details about a Coordinated Entry assessment, such as an assessor’s contact information. It should be updated each time there is a new assessment.

<table>
<thead>
<tr>
<th>Date of Assessment</th>
<th>End Date</th>
<th>Assessor’s Name</th>
<th>Assessor’s Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/14/2020</td>
<td></td>
<td>Jane Smith</td>
<td>MN Street Outreach Program</td>
</tr>
<tr>
<td>01/01/2020</td>
<td>03/13/2020</td>
<td>Jane Smith</td>
<td>MN Street Outreach Program</td>
</tr>
</tbody>
</table>

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

*Because our test client is being assessed on 03/14/2020, this old Coordinated Entry Assessment row should be given an End Date of 03/13/2020.*

- **c.** Click on Add and fill out the following fields:
  - **i.** Date of Assessment: Enter the date of the client’s assessment.
  - **ii.** Assessment Location: Enter the location where the assessment was completed.
  - **iii.** Assessor Details (Name, Phone, Etc.): Enter your information.
  - **iv.** Assessment Type: Select the most accurate option.
  - **v.** Assessment Level: Select Housing Needs Assessment.
vi. **Prioritization Status**: Select **Placed on Prioritization List**. **Do not** choose the other option or the client will not appear on the Priority List.

Do not enter an **End Date** when adding this new row or the client will not appear on the Priority List.

**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. It should be updated each time there is a new assessment.

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

b. Check for an active row without an **End Date**.
   
   i. If there is one, click on that row’s **edit pencil**.
ii. In the Edit Recordset pop-up, enter an End Date that is one day prior to the client’s assessment date, then select Save.

![Edit Recordset - (1058691)](image)

**c. Click on Add** and fill out the following fields:

i. **Start Date**: Enter the date of the client’s assessment.

ii. **Information Date**: Same as the Start Date.

iii. **Location Details**: [Optional] Enter more detail about the client’s location.

iv. **Current Living Situation**: Select the most accurate option.

v. **Living Situation verified by**: Click on Lookup, then select your Coordinated Entry Assessment provider.

vi. **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.

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### Institutional Situations

- Foster care home or foster care group home (HUD)
- Hospital or other residential non-psychiatric medical facility (HUD)
- Jail, prisons, 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.*

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**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)]

  If 'Yes' to 'Is client going to have to leave their current living situation within 14 days?'

  Has a subsequent [Client doesn’t know (HUD)]
**Prioritization Tool (VI-SPDAT)**

In some communities, a VI-SPDAT score is used to determine what type of intervention best meets a client’s needs.

a. Find the VI-SPDAT sub-assessment that should be used for your client – **VI-SPDAT** (Single Adults), **TAY-VI-SPDAT** (Youth), or **VI-FSPDAT** (Families) – and click on the Add button.

![VI-SPDAT for Individuals v2.0](image)

b. Complete the entire assessment, then click on Save to generate a score.

c. Check the **VI-SPDAT Override/Backlog Entry** sub-assessment and verify that there are no active override scores without an End Date.

i. If there is one, click on that row’s edit pencil.

ii. In the Edit Recordset pop-up, enter an End Date that is one day prior to the client’s assessment date, then select Save.

![VI-SPDAT Override/Backlog Entry](image)

**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 report. Contact your Priority List Manager or the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.
UPDATE A CLIENT’S ASSESSMENT WITH NEW INFORMATION

When new information about a client becomes known, such as a change in their **Current Living Situation**, their Coordinated Entry assessment should be updated.

In this section, you will...

☐ Add an interim update to the Coordinated Entry Assessment Entry/Exit.

☐ Update the interim assessment with new information.

ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Click on **Enter Data As** and select your Coordinated Entry Assessment 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 Coordinated Entry Assessment provider’s Entry/Exit row.

   a. If the client was added to the Priority List by another agency in your Continuum of Care (CoC), you will be updating the entry created by that agency.

4. Select the **Interims** icon, then click on **Add Interim Review** in the **Interim Reviews** pop-up.

5. Make the following selections 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 new information was reported.

6. Click on **Save & Continue** to proceed to the interim assessment.
UPDATE AN INTERIM ASSESSMENT

1. Update the assessment where necessary, paying special attention to the following:

   **[HOUSEHOLDS ONLY] HEAD OF HOUSEHOLD**
   
   Update assessment information for the head of household *only*.

   **CURRENT LIVING SITUATION SUB-ASSESSMENT**
   
   If the client’s *Current Living Situation* has changed or if it has been some time since a *Current Living Situation* value was last recorded, add a new row to this sub-assessment. It is *not* necessary to add a new sub-assessment row each time the client’s assessment is updated.

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

   b. Check for an active row without an *End Date*.

      i. If there is one, click on that row’s **edit pencil**.

      ii. In the *Edit Recordset* pop-up, enter an *End Date* that is **one day prior** to the date you are updating the client’s assessment, then select **Save**.

   c. Click on **Add** and fill out the following fields:

      i. **Start Date**: Enter the date of the client’s assessment.

      ii. **Information Date**: Same as the **Start Date**.

      iii. **Location Details**: **[Optional]** Enter more detail about the client’s location.
iv. **Current Living Situation**: Select the most accurate option.

v. **Living Situation verified by**: Click on **Lookup**, then select your Coordinated Entry Assessment provider.

vi. **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.*

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**VI-SPDAT – CORRECT A SCORING ERROR**

An existing VI-SPDAT score can be updated if a mistake was made when it was first entered.

a. Find the score that was entered incorrectly and click on its **edit pencil**.
b. Update any inaccurate answers, but do not change the Start Date. When you are finished making updates, click on Calculate to see how the score has changed.

c. Select Save to close the Edit Recordset pop-up.

**VI-SPDAT – Enter an Override Score**

A client’s calculated VI-SPDAT score can be replaced by an override score if your community’s Coordinated Entry policies allow it.

a. Find the VI-SPDAT Override/Backlog Entry sub-assessment and click on the magnifying glass to open the sub-assessment pop-up.

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

i. If there is one, click on that row’s edit pencil.

ii. In the Edit Recordset pop-up, enter an End Date that is one day prior to the date you are updating the client’s assessment, then select Save.

c. Click on the Add button and complete the following fields:

i. Date of Assessment: Today’s date.

ii. VI-SPDAT Type: Select the type that matches the client’s existing score.

iii. Score: Select the client’s override score value.

iv. Override or Backlog?: Choose Override.

v. Notes: [Optional] Add notes about the Override score.
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 updated information should now appear on the Priority List report. Contact your Priority List Manager or the MN HMIS Helpdesk (mnhmis@icalliances.org) if you require verification.
ADD A HOUSEHOLD MEMBER TO THE PRIORITY LIST

When a person joins a household, they can be added to the Priority List so that they are considered for housing opportunities with the rest of the household. Before proceeding, make sure that the person being added to the Entry/Exit already has a client record in HMIS. If they do not, refer to the section Find or Create a Client Record in HMIS for instructions on creating a new client record.

In this section, you will...

☑️ Add a client to the Coordinated Entry Assessment Entry/Exit.
☑️ Add an interim update to the Entry/Exit.
☑️ Update the household size in the interim assessment.

ADD A HOUSEHOLD MEMBER TO AN ENTRY/EXIT

1. Click on Enter Data As and select your Coordinated Entry Assessment provider.

2. Open the client record of the head of household. When the Back Date Mode pop-up appears, select Use Current System Date.

3. Select the Households tab and find the household that includes everyone who is attached to the Coordinated Entry Assessment entry. If the household does not include the person being added to the Entry/Exit, do the following:
   a. Click on Manage Household to open the Household Information pop-up.

   ![Manage Household button]

   b. Click on the Add/Delete Household Members button. Another pop-up window will appear.
c. Click on the **arrow** next to **Add Clients to the Household** in the pop-up.

![Previous Household Members]


d. Search for the client being added to the household. When they appear in the **Client Results** table, click on the **green circle** to select them, then click on **Continue**.

e. In the **Household Members** table, update the following information for the new member:
   
   i. **Relationship to Head of Household**: Select the most accurate option.

   ii. **Joined Household**: Enter the date that the client joined the household.

![Household Members]

f. If necessary, the **Household Type** field can be updated at this time.

g. Click on **Save & Exit** to close the **Household Information** pop-up.

4. Click on the **Entry/Exit** tab and find the Entry/Exit row for the **Coordinated Entry Assessment** provider.

5. Select the **edit pencil** next to the **Project Start Date**.

![Entry / Exit]
6. Click on **Save & Continue** in the **Edit Project Start Data** pop-up to open the entry assessment.

7. Click on **Include Additional Household Members** in the household members table at the top of the entry assessment.

8. Check the box next to the client being added to the Entry/Exit and enter the date they joined the household in the **Project Start Date** field.

9. Click on **Save & Continue** to close the **Edit Project Start Data** pop-up, then close the entry assessment.

Now that the client has been added to the Entry/Exit, the household size needs to be updated in the Coordinated Entry assessment. Continue reading for instructions!
### ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Make sure that you are in EDA mode as your Coordinated Entry Assessment provider and have opened the head of household’s record.

2. Click on the Entry/Exit tab and find the Coordinated Entry Assessment provider’s Entry/Exit row.
   - If the client was added to the Priority List by another agency in your Continuum of Care (CoC), you will be updating the entry created by that agency.

3. Select the Interims icon, then click on Add Interim Review in the Interim Reviews pop-up.

4. Select the following options in the Add Interim Review pop-up:
   - **Household Members**: Check the box next to the name of every household member.
   - **Interim Review Type**: Select Update.
   - **Review Date**: The date the household member was added to the Priority List.

5. Click on Save & Continue to proceed to the interim assessment.
UPDATE THE HOUSEHOLD SIZE IN THE ASSESSMENT

1. In the interim assessment, scroll down to the Household Size questions.

2. Make updates to the Household Size fields to accurately show how many household members are seeking a housing placement through Coordinated Entry.

3. When you are finished making updates, scroll down to the bottom of the assessment and click on Save & Exit.

*The Household Size question series is what determines how many household members are counted on the Priority List report!*

The household’s new composition should now be reflected on the Priority List report. 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 person leaves a household or becomes ineligible for placement in homeless-dedicated housing, they should be removed from the Priority List so that they are not considered for housing opportunities. If the person in question is the head of household, then all household members must be removed 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 an interim update to the Entry/Exit. (If necessary)
- Update the household size in the interim assessment. (If necessary)

ADD EXIT DATA

1. Click on Enter Data As and select your Coordinated Entry Assessment 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 Coordinated Entry Assessment provider’s Entry/Exit row.
   a. If the client was added to the Priority List by another agency in your Continuum of Care (CoC), you will be updating the entry created by that agency.

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 who will be leaving the Priority List. If the head of household is being removed from the Priority List, check all of the boxes.
   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 Only] Head of Household**

   Update the assessment for the head of household *only*. If another household member is being removed from the Priority List, **do not** fill out the exit assessment.

   **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 all clients have been removed from the Priority List, then data entry stops at this point. However, if there are still household members on the Priority List, the household size needs to be updated in the Coordinated Entry assessment. Continue reading for instructions!
ADD AN INTERIM UPDATE TO AN ENTRY/EXIT

1. Make sure that you are in EDA mode as your Coordinated Entry Assessment provider and have opened the head of household’s record.

2. Click on the Entry/Exit tab and find the Coordinated Entry Assessment provider’s Entry/Exit row.
   a. If the client was added to the Priority List by another agency in your Continuum of Care (CoC), you will be updating the entry created by that agency.

3. Select the Interims icon, then click on Add Interim Review in the Interim Reviews pop-up.

4. 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 still on the Priority List. Do not include any exited household members.
   b. Interim Review Type: Select Update.
   c. Review Date: The date the client was removed from the Priority List.

5. Click on Save & Continue to proceed to the interim assessment.
UPDATE THE HOUSEHOLD SIZE IN THE ASSESSMENT

1. In the interim assessment, scroll down to the Household Size questions.

2. Make updates to the Household Size fields to accurately show how many household members are seeking a housing placement through Coordinated Entry.

*The Household Size question series is what determines how many household members are counted on the Priority List report!*

3. When you are finished making updates, scroll down to the bottom of the assessment and click on Save & Exit.

The household’s new composition should now be reflected on the Priority List report. 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.

THE 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.*