Coordinated Entry (CE) Data Entry Training Guide

Metro Homeless Impact Division

Updated June 2019

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What is HMIS?

- HMIS stands for **Homeless Management Information System**. An HMIS is a web-based software application that collects and reports on client-level information for people who are served by projects intended to prevent and end homelessness.
- HMIS collects information about who your clients are, when you served them, what their circumstances are when they enter your project, whether they change, and what services you are providing.

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Why Use HMIS?

- **Every Continuum of Care (CoC) is required to have a single HMIS in order to receive funding from the Dept. of Housing and Urban Development (HUD)**
- HMIS is used to measure project effectiveness, generate an unduplicated count of homeless persons for the CoC, and help understand the extent and nature of homelessness and patterns of service use.
- The more agencies that participate, the better we are able to provide services and demonstrate our community's effectiveness in ending and preventing homelessness!

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How Data is Organized in HMIS

IMAGINING HMIS AS A NEIGHBORHOOD

- To get a better understanding of the way information is stored in HMIS, imagine HMIS as a neighborhood. All of the information collected by service providers in Nashville lives in this neighborhood. Different streets in the neighborhood represent different agencies – for example, let's say the neighborhood has Safe Haven St., Centerstone SSVF Ave., Nashville Cares Way, Park Center Blvd. On each street there are many houses, representing the different programs that each agency (street) contains – for example, on Centerstone SSVF Ave. there's a house called *Homelessness Prevention*, as well as a house called *Rapid Rehousing* since they run both of those programs. Every time you, the user, enter information into HMIS, you will always be entering that information into a specific *house* on a particular *street*.
- A client in Nashville may receive services at any "house" on any "street" over the course of time. For example, perhaps they were a part of Centerstone SSVF's Rapid Rehousing program a year ago, but now they're receiving services from the Salvation Army. The Salvation Army HMIS user will be entering that client's information into a different "house" than the SSVF HMIS user had entered into previously. ***Note: Since the Nashville/Davidson County does not engage in system-wide data sharing at this point, HMIS users at one agency cannot view the details of services a client has received at any agency other than their own. You can only view the services and entries and exits that your agency has provided.** You can view information entered in other houses on your street, but not on other streets in the neighborhood.
- Think of Coordinated Entry as the **gate** to the neighborhood. By utilizing Coordinated Entry, we can prioritize referrals and get people in our community into housing more quickly and efficiently.

Privacy and Security Reminders

- Always log out of HMIS when you leave your desk.
- Choose a strong password and do not share it or write it down.
- Review the release of information form with your clients thoroughly.

Important Resources

- HMIS URL (save as a bookmark!): **https://sp5.servicept.com/MHIDNashville**
- HMIS Help Desk: **HMISHelp@nashville.gov**
- HMIS Administrator: Rachel O'Connor Cook (**Rachel.cook@nashville.gov**)
- Coordinated Entry Manager: Jessica Ivey (**Jessica.ivey@nashville.gov**)

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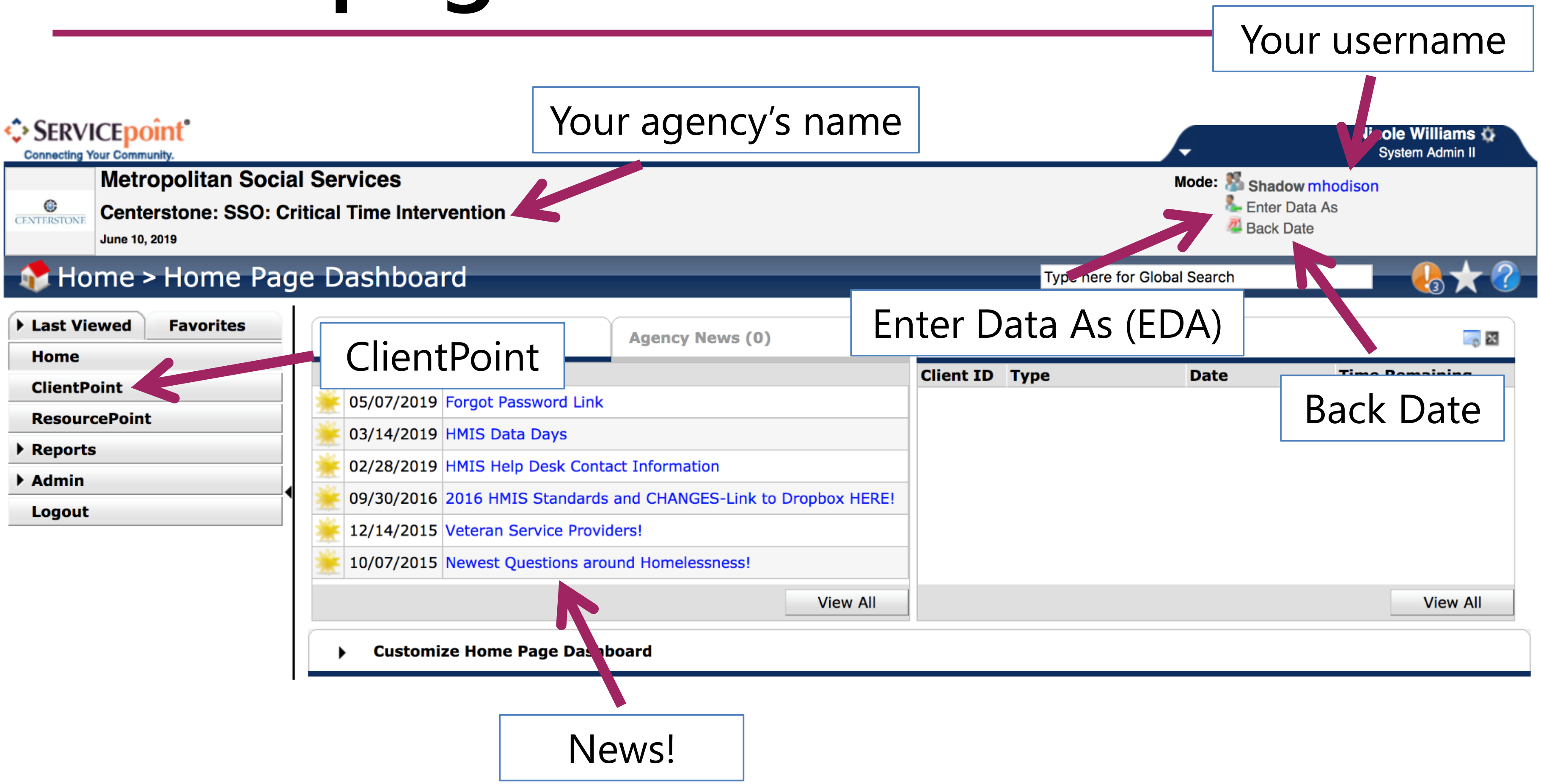
Before You Start…

In order to enter a client in HMIS, you **must** have a signed **Release of Information** (ROI) on file!!

Homepage



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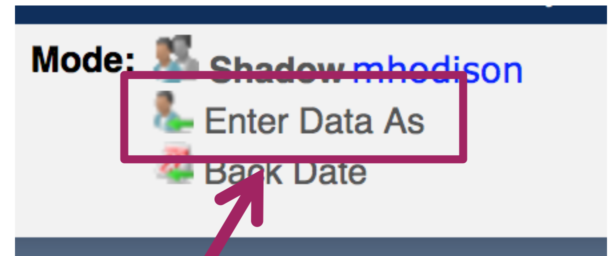
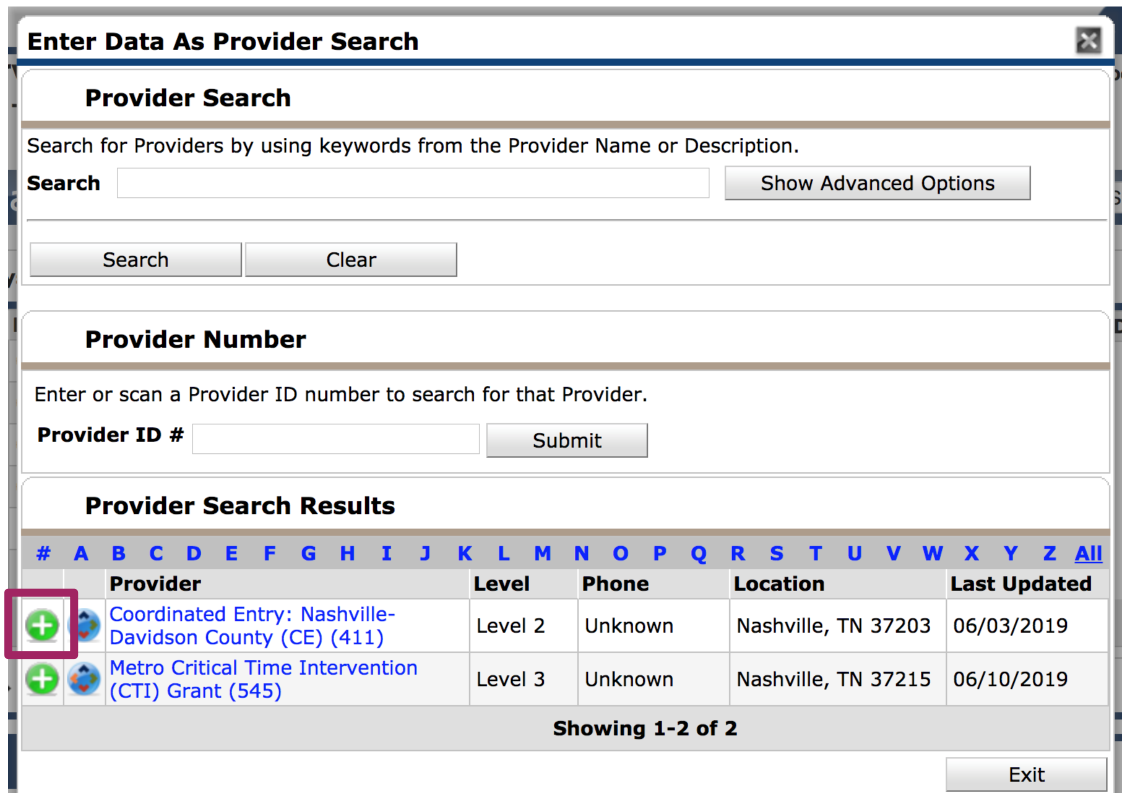
Always the first step: EDA Mode

1. After you log in, first find and click "**Enter Data As**" (EDA) at the top right of the page. The provider you select here is where your data will be stored – you are "Entering As" that provider and associating the client with it.



Enter Data As (EDA)



2. Select the **program** where the client you're entering belongs by clicking the **green circle** with the plus sign.

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EDA Tips

- Selecting the correct EDA mode is an important step you need to take every single time you enter data for a client!
  - Especially if you're entering multiple clients in a row, you should make frequent checks to that top-right section of the screen to ensure that you're in the EDA mode that you meant to be in.
  - If you realize you have entered a client's information under the wrong EDA mode, you will need to contact the HMIS Help Desk to delete the data. Then you'll have to start over, using the correct EDA mode – so pay close attention!

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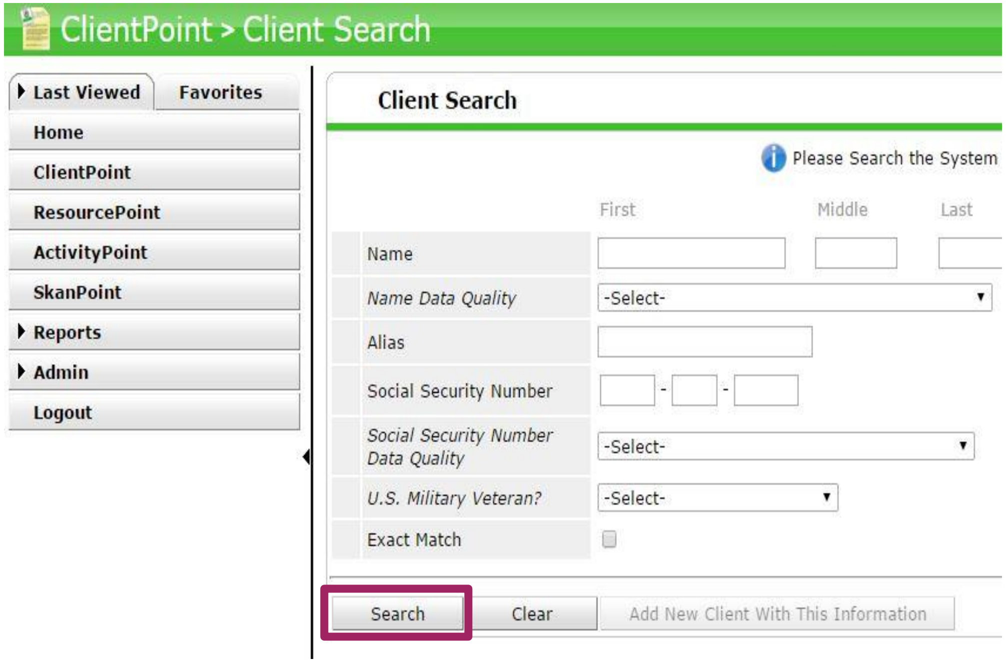
ClientPoint – Searching for a Client

- Before entering a new client, you are required to first **search the system** to see if that client already has a record in HMIS (in order to avoid duplication).
- Enter the client's first & last name and click "Search."



Note: If you do not find a match using the client's name, add the client's SSN and click "Search" again.

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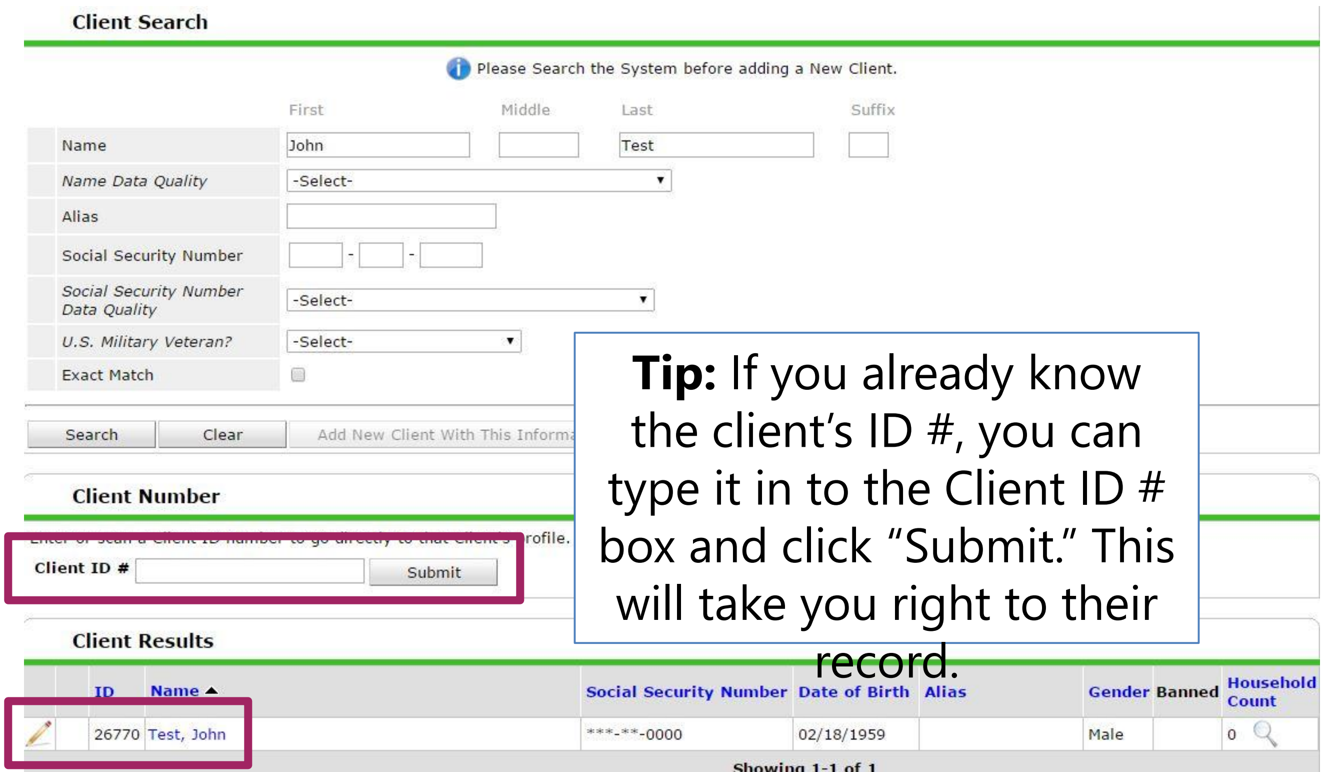
ClientPoint – Searching for a Client

If the client has a record in the system, their name will appear under “Client Results.” If they are a match based on name, SSN, and DOB, select the pencil to edit the client record.



Tip: If you already know the client’s ID #, you can type it in to the Client ID # box and click “Submit.” This will take you right to their record.

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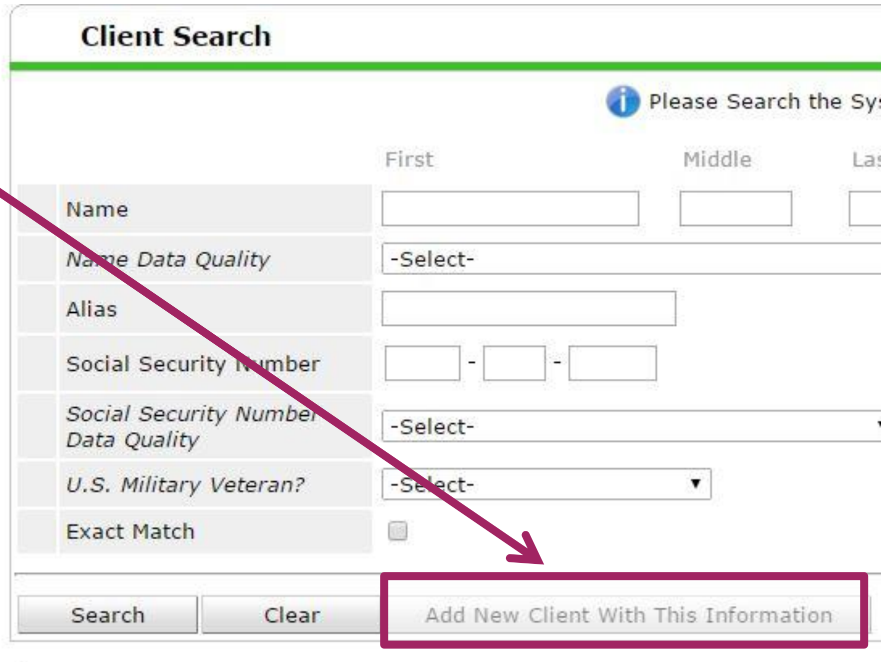
ClientPoint – Adding a New Client

- The system will not allow you to add a new client until you have at least done a basic search by name.
- If no client exists after you have tried searching their name and SSN, you may add them as a new client.



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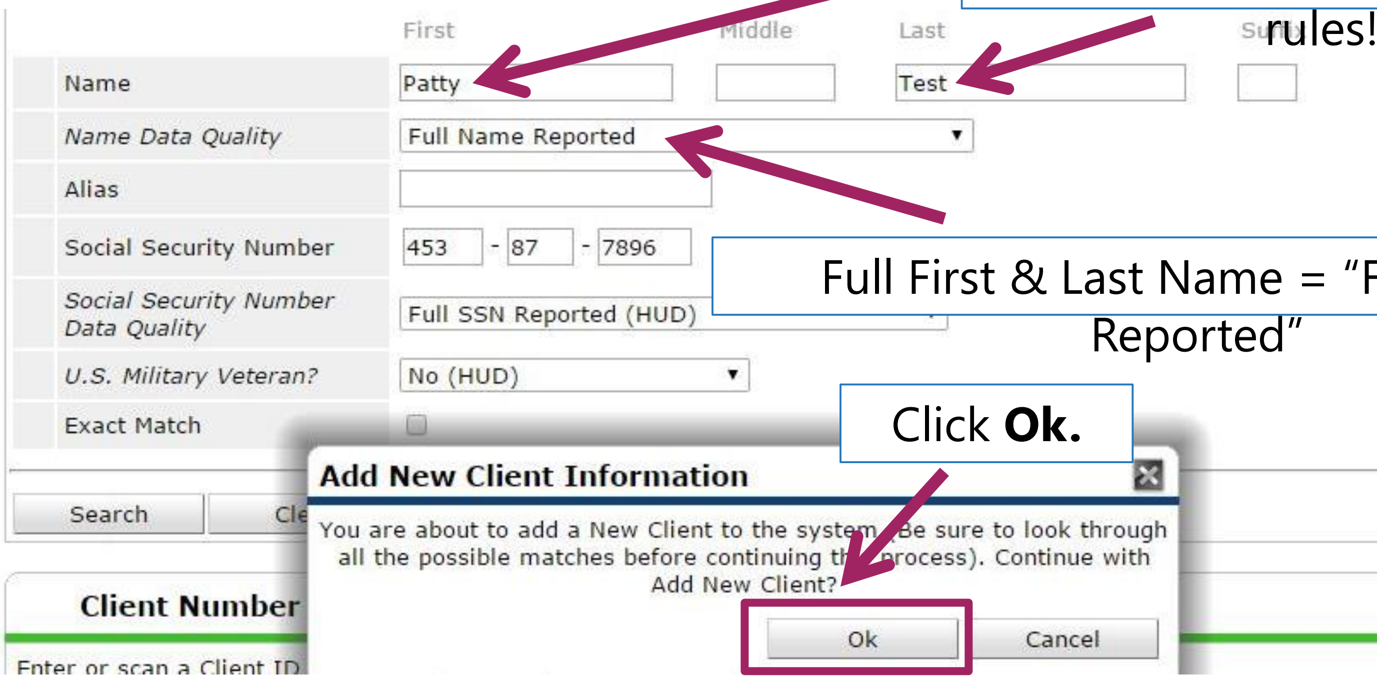
ClientPoint – Adding a New Client

- To add a new client, enter all client information (*First Name, Last Name, Name Data Quality, SSN, SSN Data Quality,* and *US Military Veteran?*) and click "**Add New Client With This Information**."

Follow proper capitalization rules!



Full First & Last Name = "Full Name Reported"

Click **Ok.**

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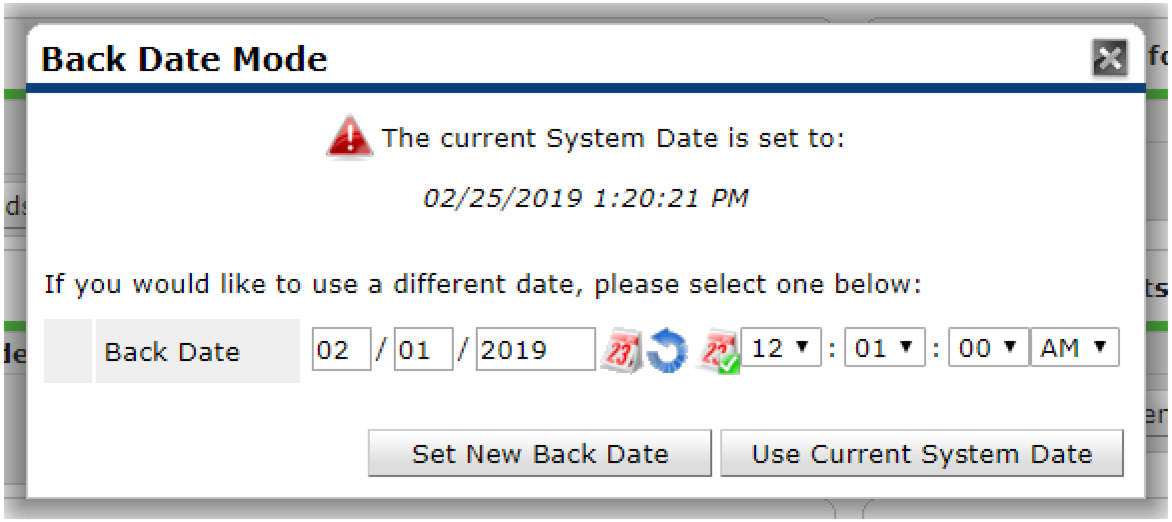
Client Record – Back Date Mode

- After adding a client or selecting a client record to edit, you will see a "Back Date Mode" pop-up.



- **Back Date** = The date something occurred (for example: the date you provided a service, the date a resident completed an activity, the date you completed an annual update, etc.)

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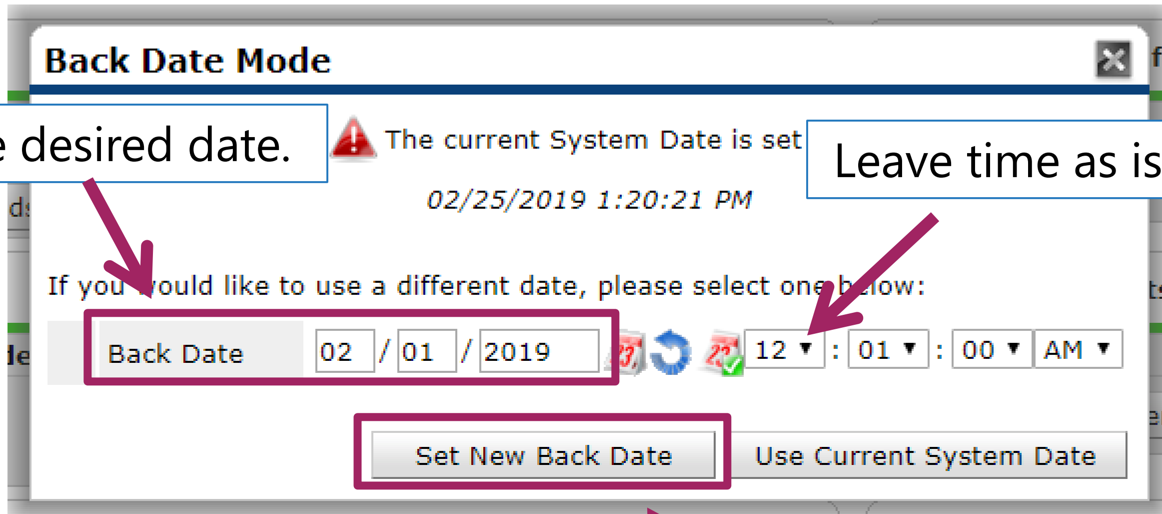
Client Record – Back Date Mode

Remember: **<u>Always</u> use Back Date Mode!**



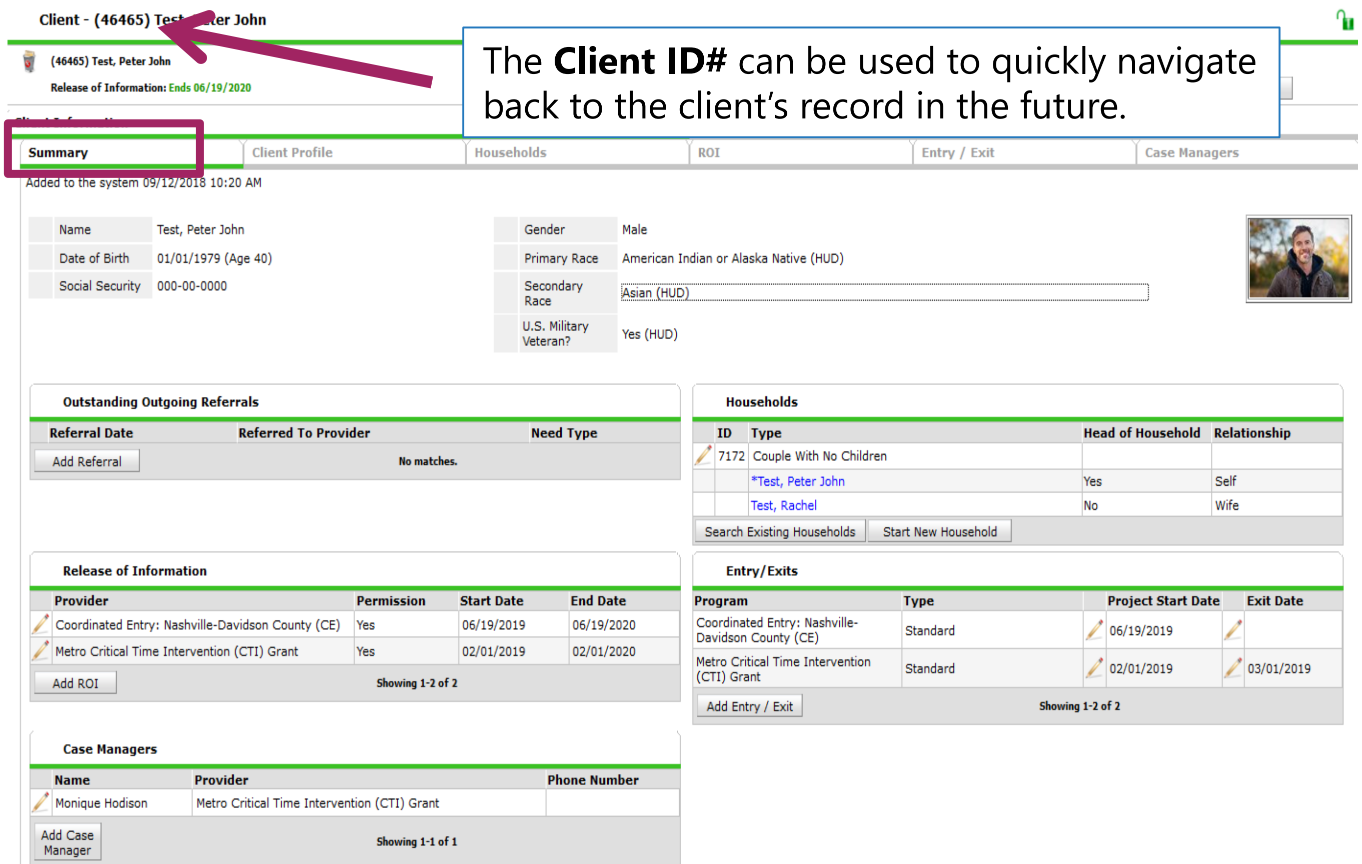
Enter the desired date.

Leave time as is! (12:01:00 AM)

Click **Set New Back Date** to continue.

Client Information – Summary Tab

- You will land on the **Summary** tab, which gives you a snapshot of much of the information in the client's record.



The **Client ID#** can be used to quickly navigate back to the client's record in the future.

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Client Profile Tab

- Client Demographics
- Client Photo
- File Attachments

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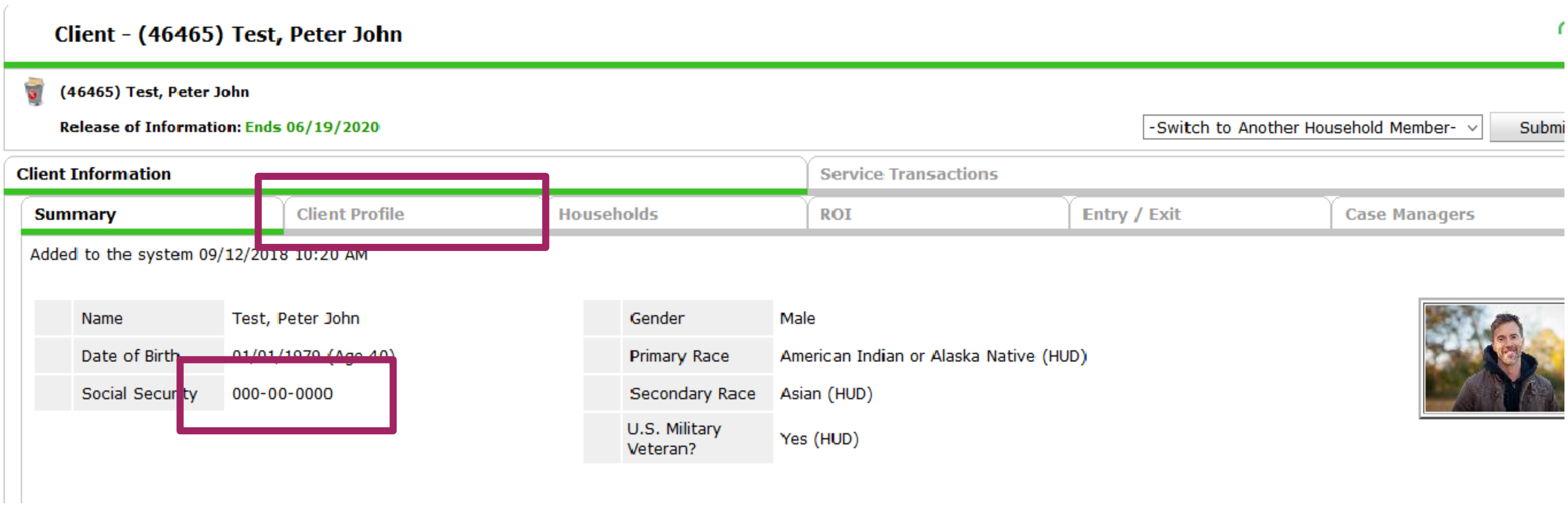
Client Profile Tab

- Use the **Client Profile** tab to complete or correct demographic/identifying information, add a **photo** (if available), and **upload documents**.



Note: Most users can only see the last 4 of SSN.
Contact your Agency Point of Contact if you believe the entire SSN is incorrect.

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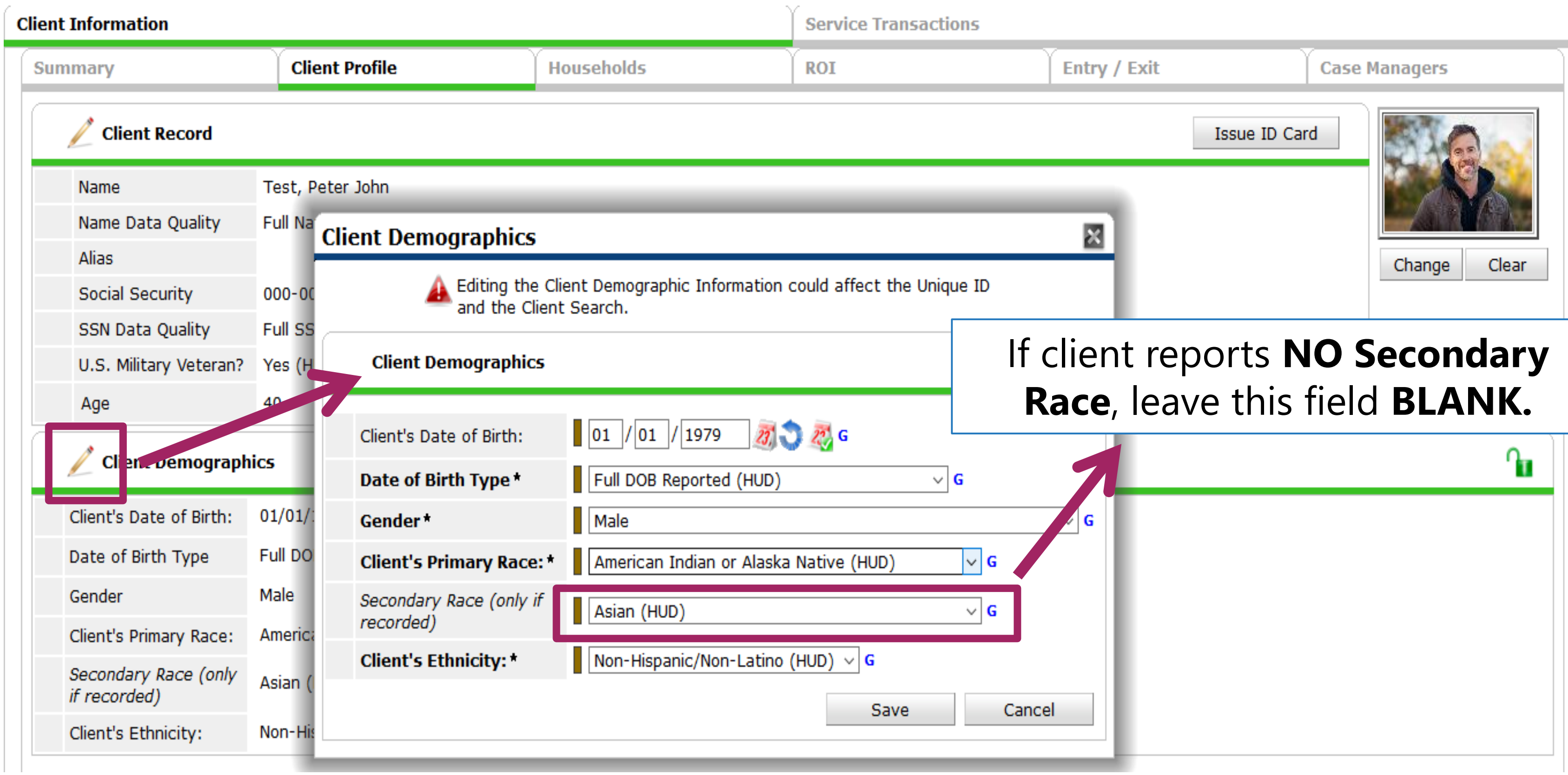
Client Profile Tab – Client Demographics

- Make sure **all** information is completed. Click the pencil to edit existing information.



If client reports **NO Secondary Race**, leave this field **BLANK.**

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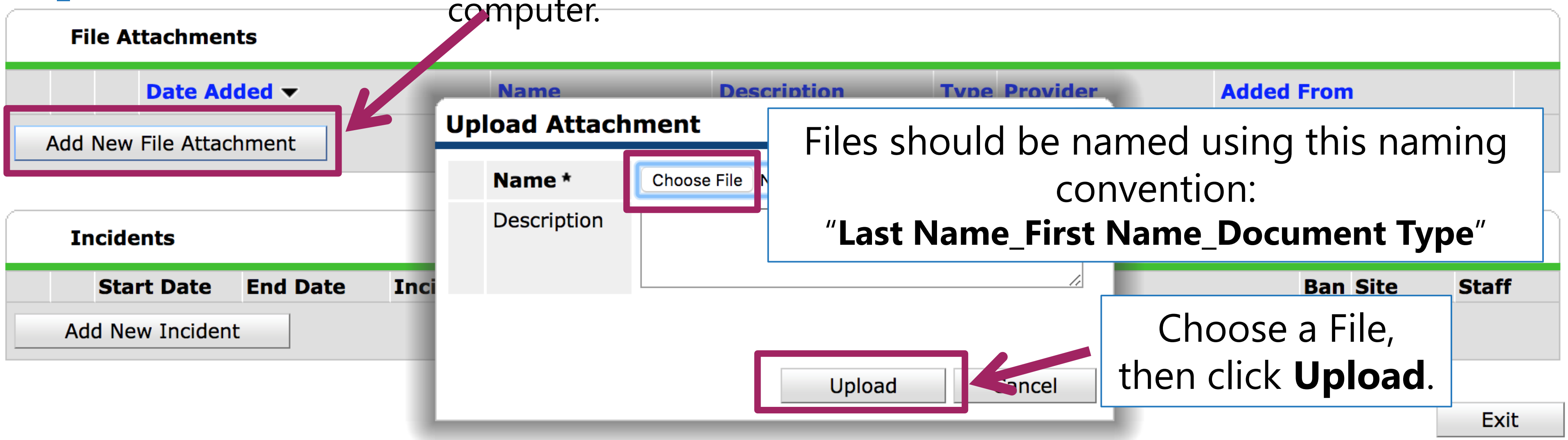
Client Profile Tab – File Attachments

- Use **File Attachments** (at the bottom of the Client Profile tab) to upload signed releases of information and housing-related documents.

Click **Add New File Attachment** to select a document from your computer.

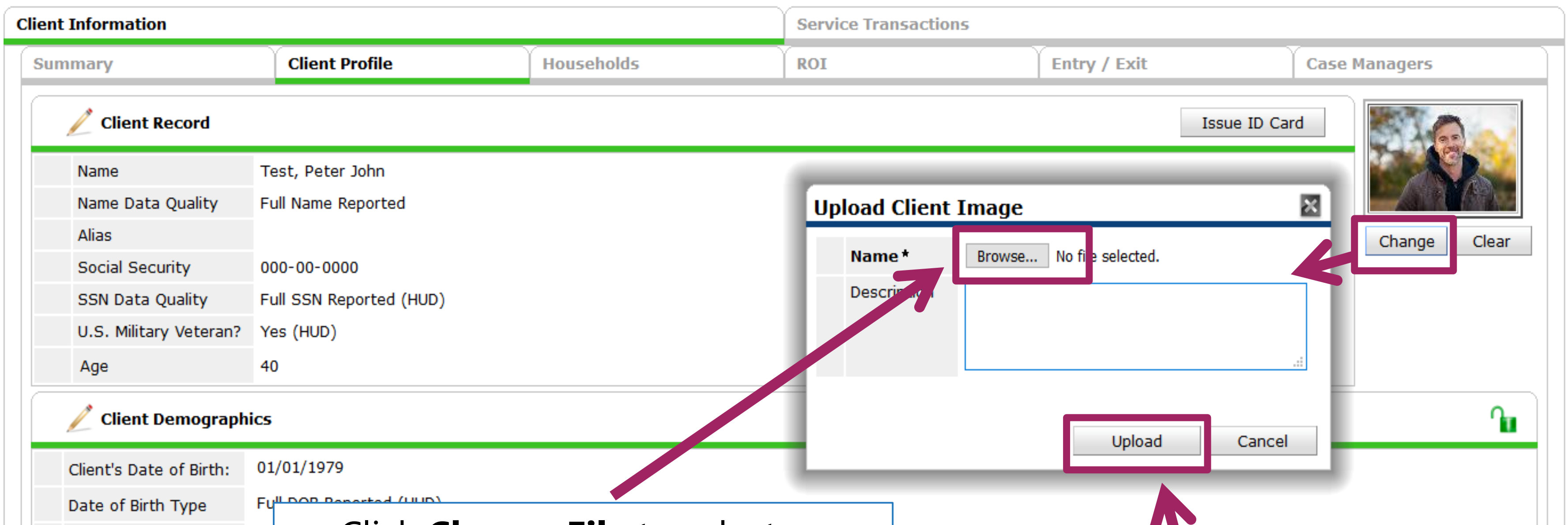


Files should be named using this naming convention:
"**Last Name_First Name_Document Type**"

Choose a File, then click **Upload**.

Client Profile Tab – Client Photo

- If you have obtained permission to upload a client photo, click “**Change**” to upload an image.



Click **Choose File** to select an image from your computer. (Must be a JPEG or PNG file, *not* a PDF.)

Then click **Upload**.

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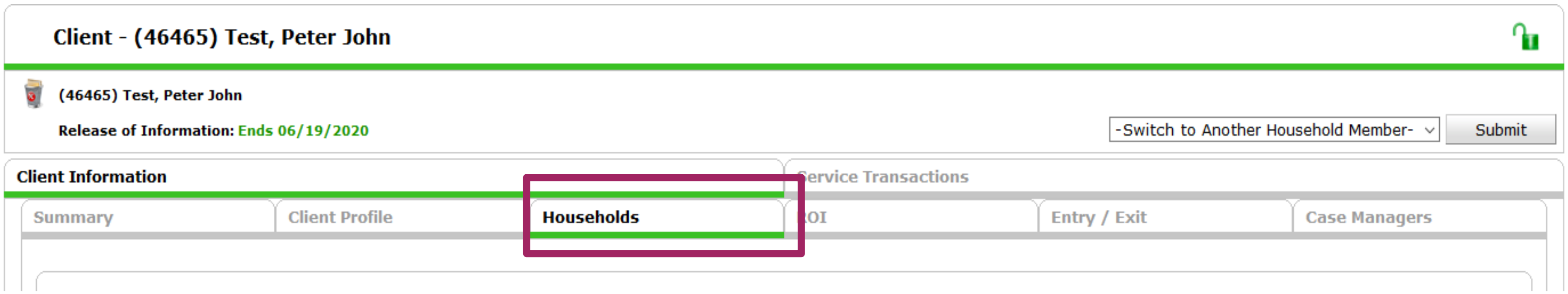
Households Tab

- Create households with **multiple** members
- If you're working with a single individual, skip this step!

Households Tab

- If the client has other members in their household, relative or non-relative, click on the **Households** tab next.



Households Tab

- Check to see if the client is already in a household. If the household exists, select it.
  - **Note**: If a household already exists in HMIS, but the household makeup has changed, **create a new household** instead of adding/subtracting members from the previous household.
- If the client is not already in a household, select “Start New Household.” (See next slide)

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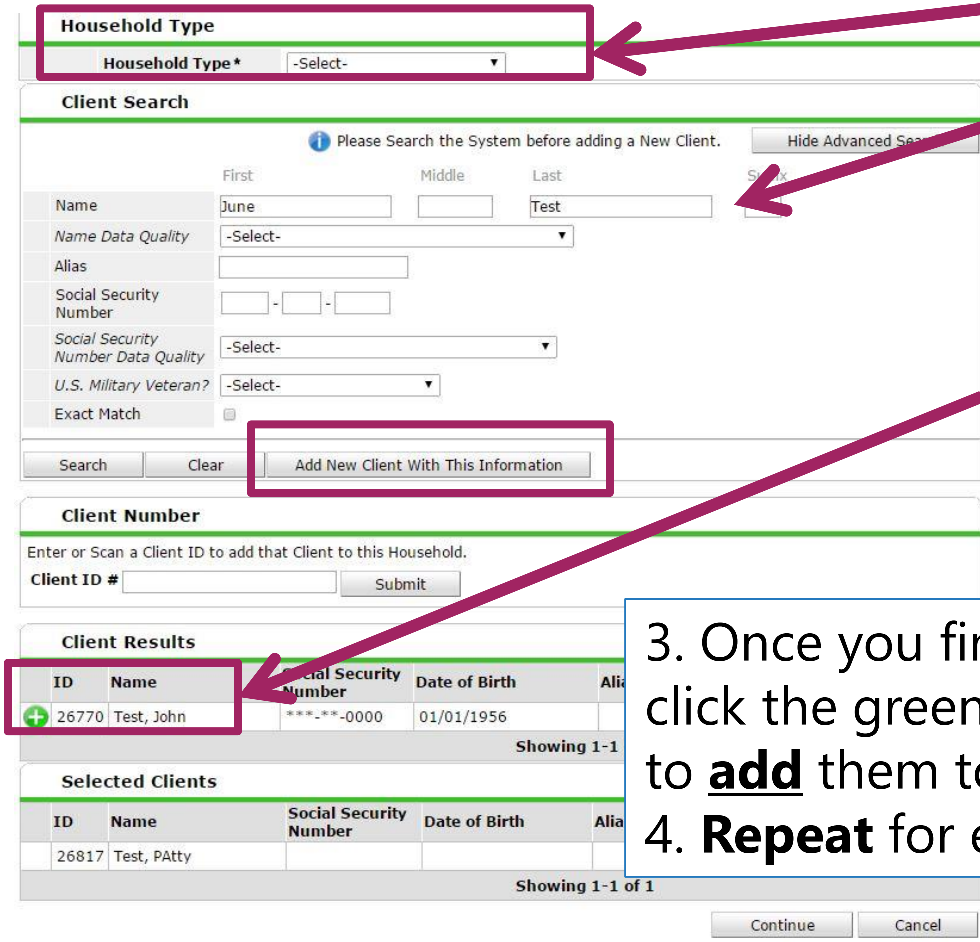
Households Tab – New Household

Click "Start a New Household."



1. Select the **Household Type**.

2. **Search** for a family member. If they already exist in the system, they will populate under "Client Results." If they don't already exist, select "**Add new Client with This Information**."

3. Once you find/create the family member, click the green circle with the plus in order to **<u>add</u>** them to the household.
4. **Repeat** for each household member.

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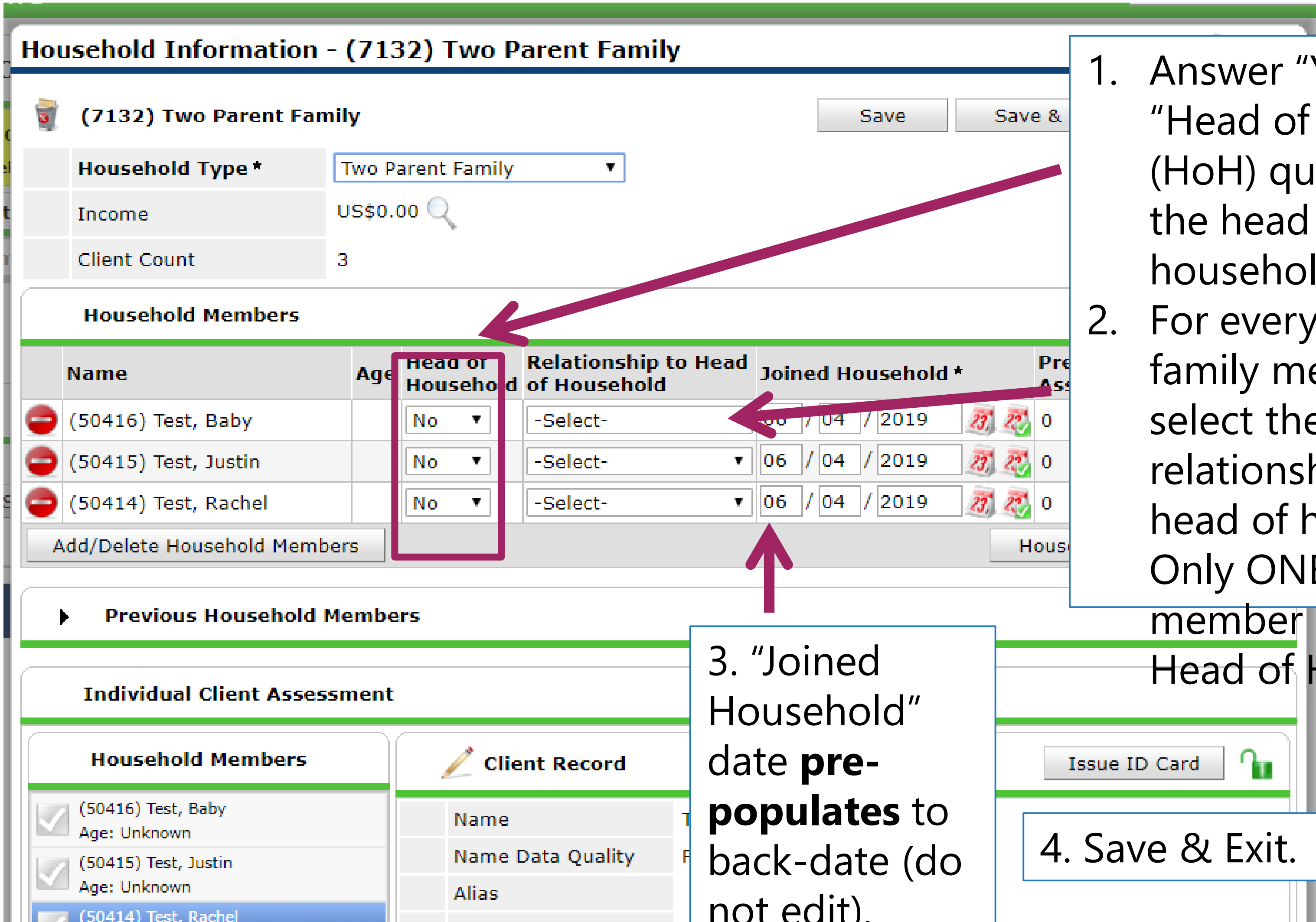
Households Tab – New Household



1. Answer "Yes" to the "Head of Household" (HoH) question for the head of household.
2. For every other family member, select their relationship **TO** the head of household. Only ONE household member listed as Head of Household.

3. "Joined Household" date **pre-populates** to back-date (do not edit).

4. Save & Exit.

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ROI Tab

- Release of Information
- Remember: every household member age 18+ must sign their *own* ROI (guardians can sign for minors)
- Even though you've uploaded the ROI, you still have to electronically indicate that there is an ROI on file!

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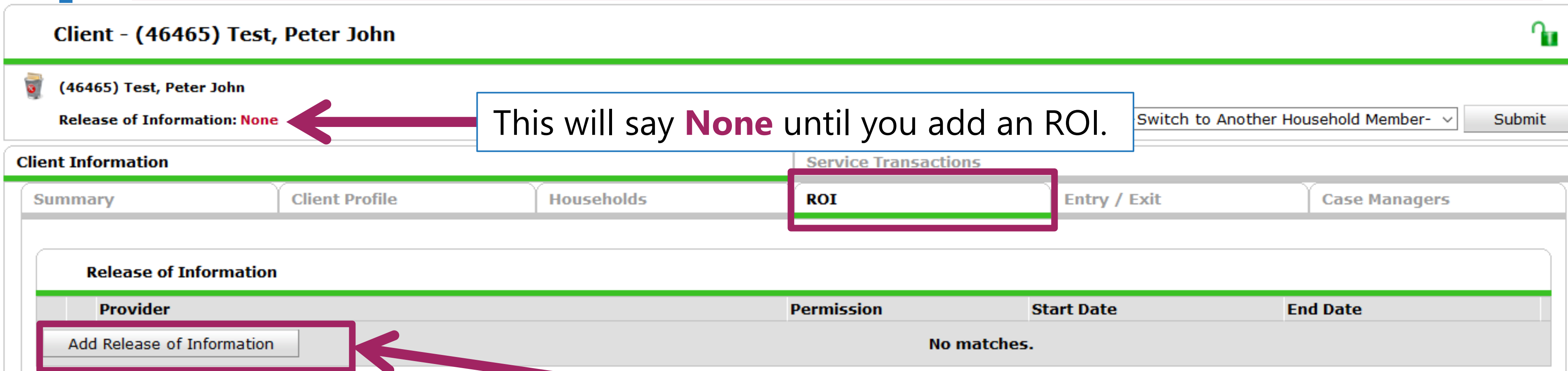
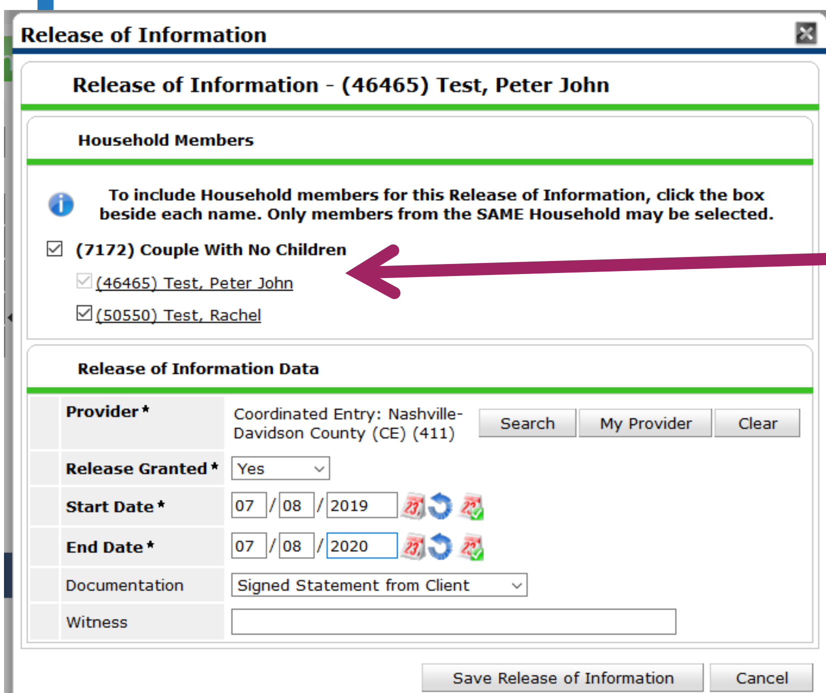
Add a New Release of Information



This will say **None** until you add an ROI.

1. Click "**Add Release of Information**."



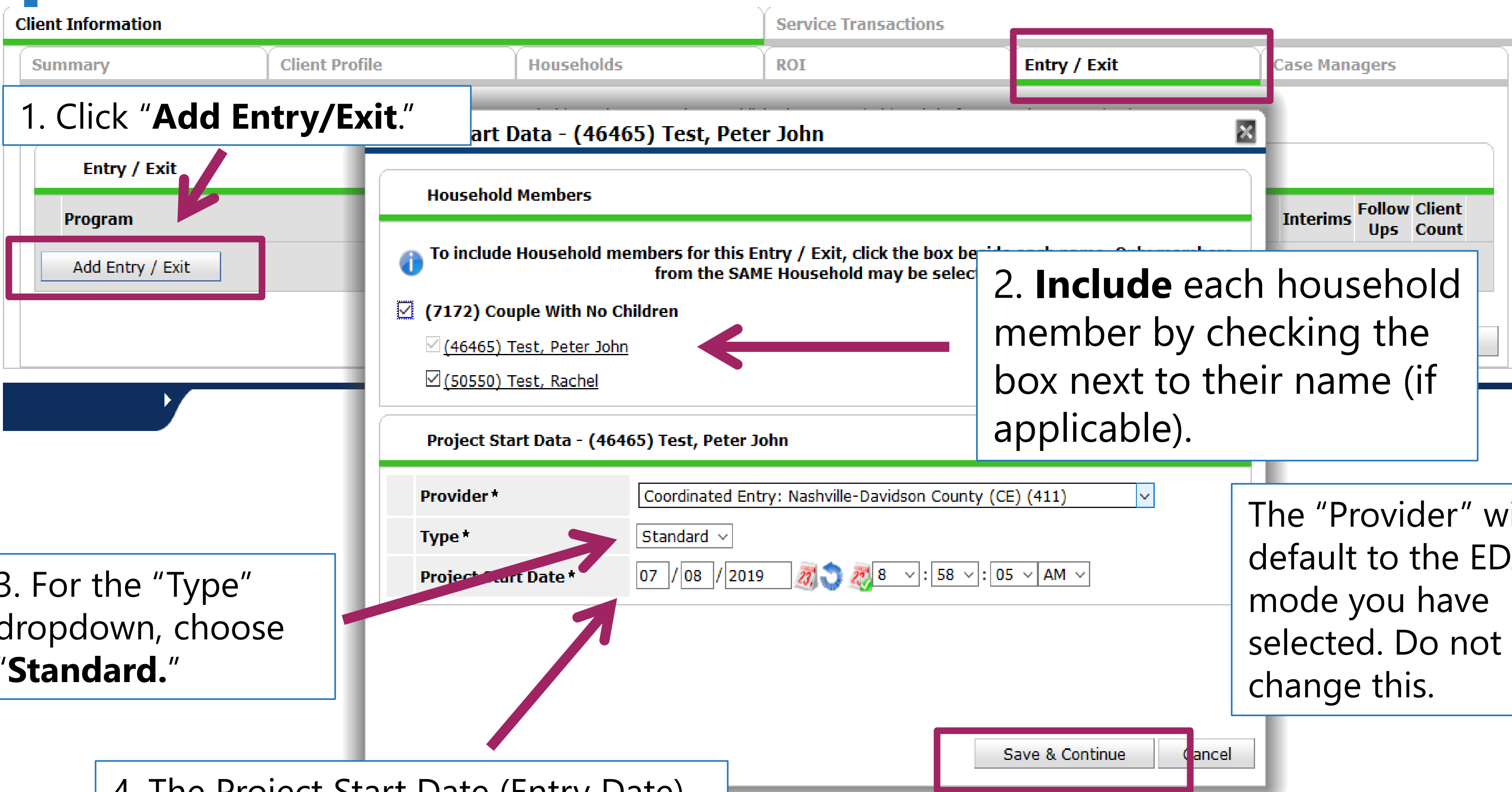
2. To **tag** <u>multiple family members at once</u> to be connected to this ROI, select the check marks beside their names. Remember, an original signed HMIS ROI must also live at the agency.

3. Release Granted = "**Yes.**" Fill in **End Date. Documentation** type should be "Signed Statement from Client." **Save** Release of Information.

Entry/Exit Tab

- Entries

Entry/Exit Tab – Add an Entry



1. Click "**Add Entry/Exit**."

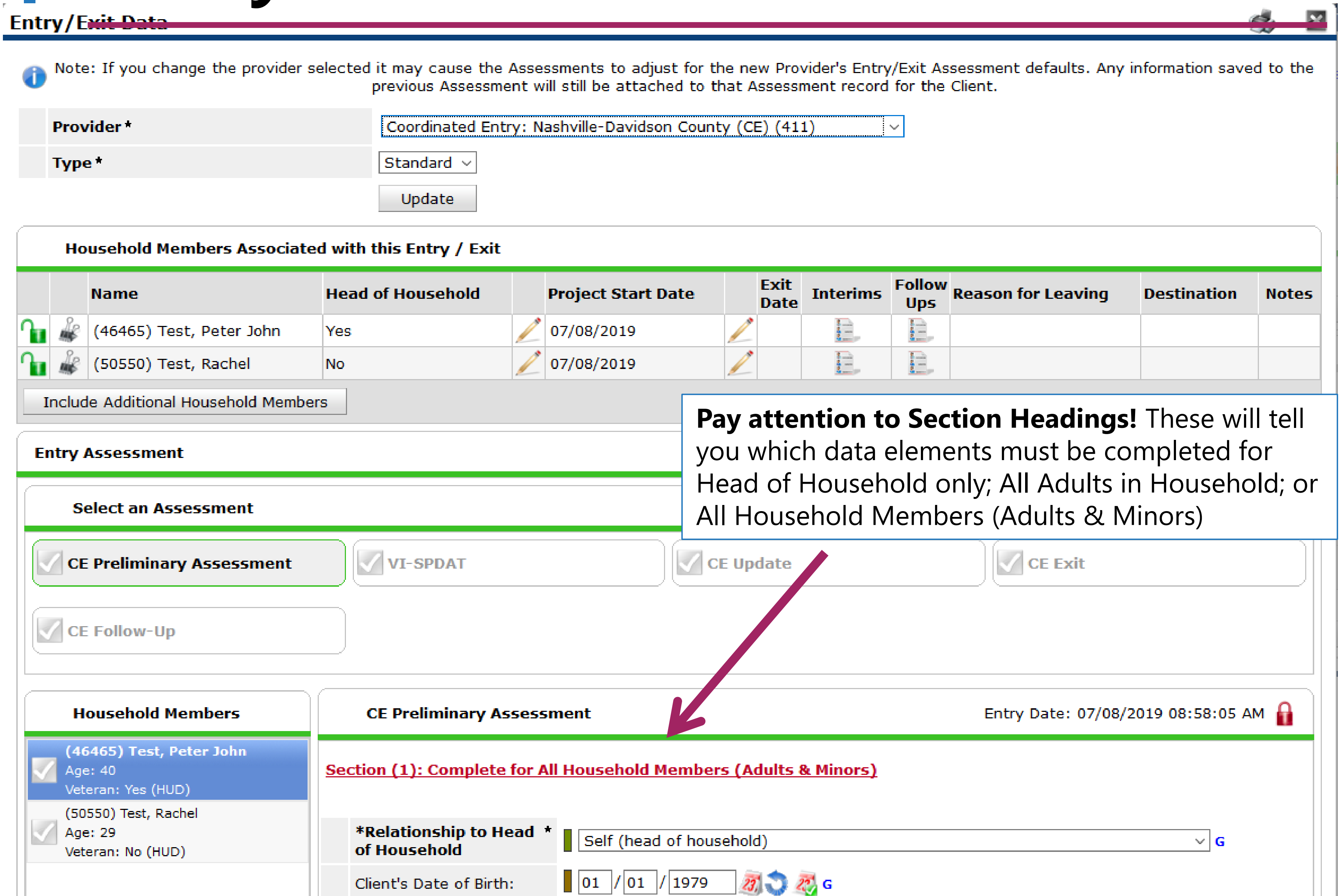
2. **Include** each household member by checking the box next to their name (if applicable).

3. For the "Type" dropdown, choose "**Standard.**"

4. The Project Start Date (Entry Date) will default to the Back Date. Do not change the date or time.

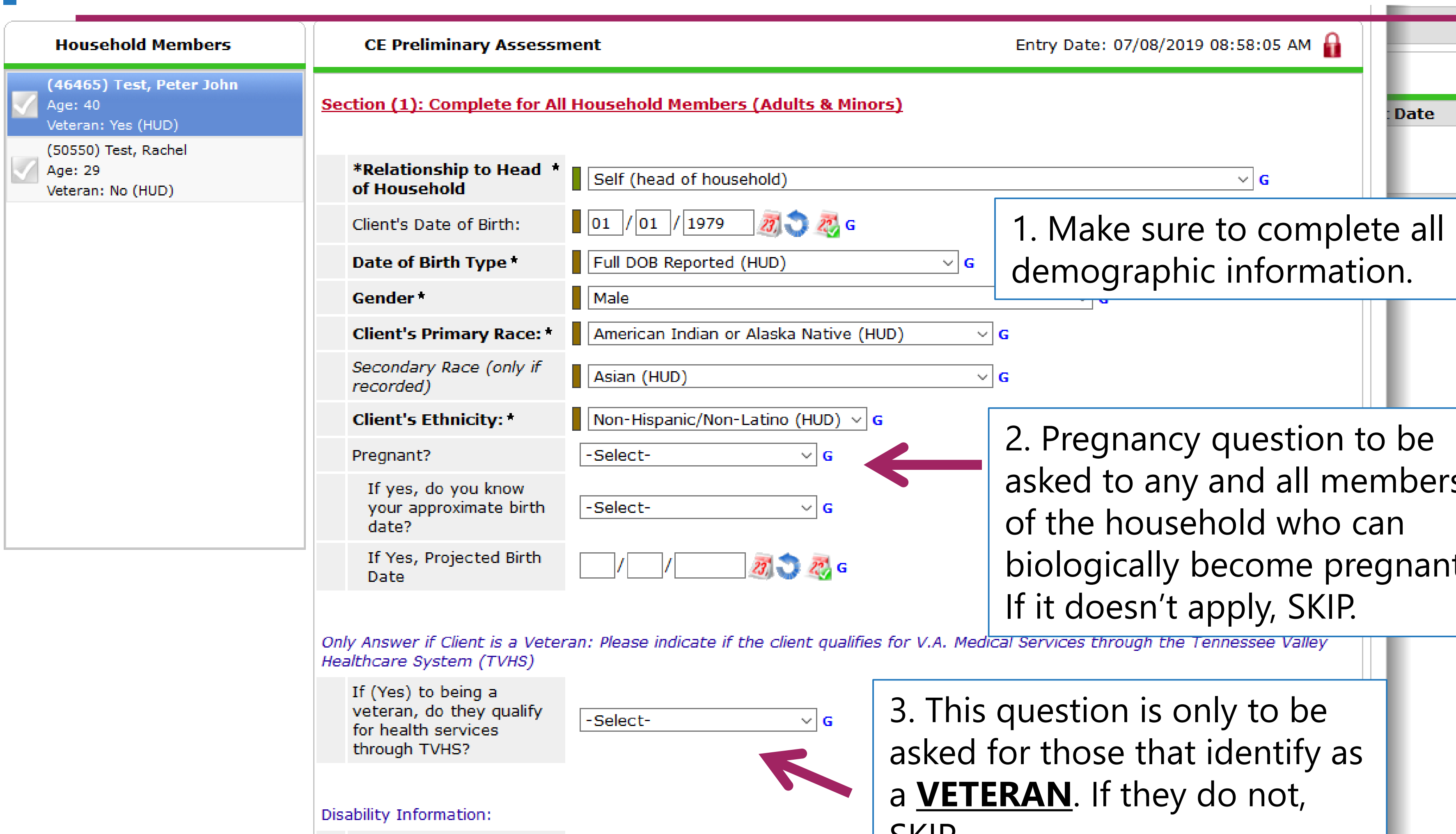
The "Provider" will default to the EDA mode you have selected. Do not change this.

Entry Assessment



Pay attention to Section Headings! These will tell you which data elements must be completed for Head of Household only; All Adults in Household; or All Household Members (Adults & Minors)

Entry Assessment – Section 1



1. Make sure to complete all demographic information.

2. Pregnancy question to be asked to any and all members of the household who can biologically become pregnant. If it doesn't apply, SKIP.

3. This question is only to be asked for those that identify as a **VETERAN**. If they do not, SKIP.

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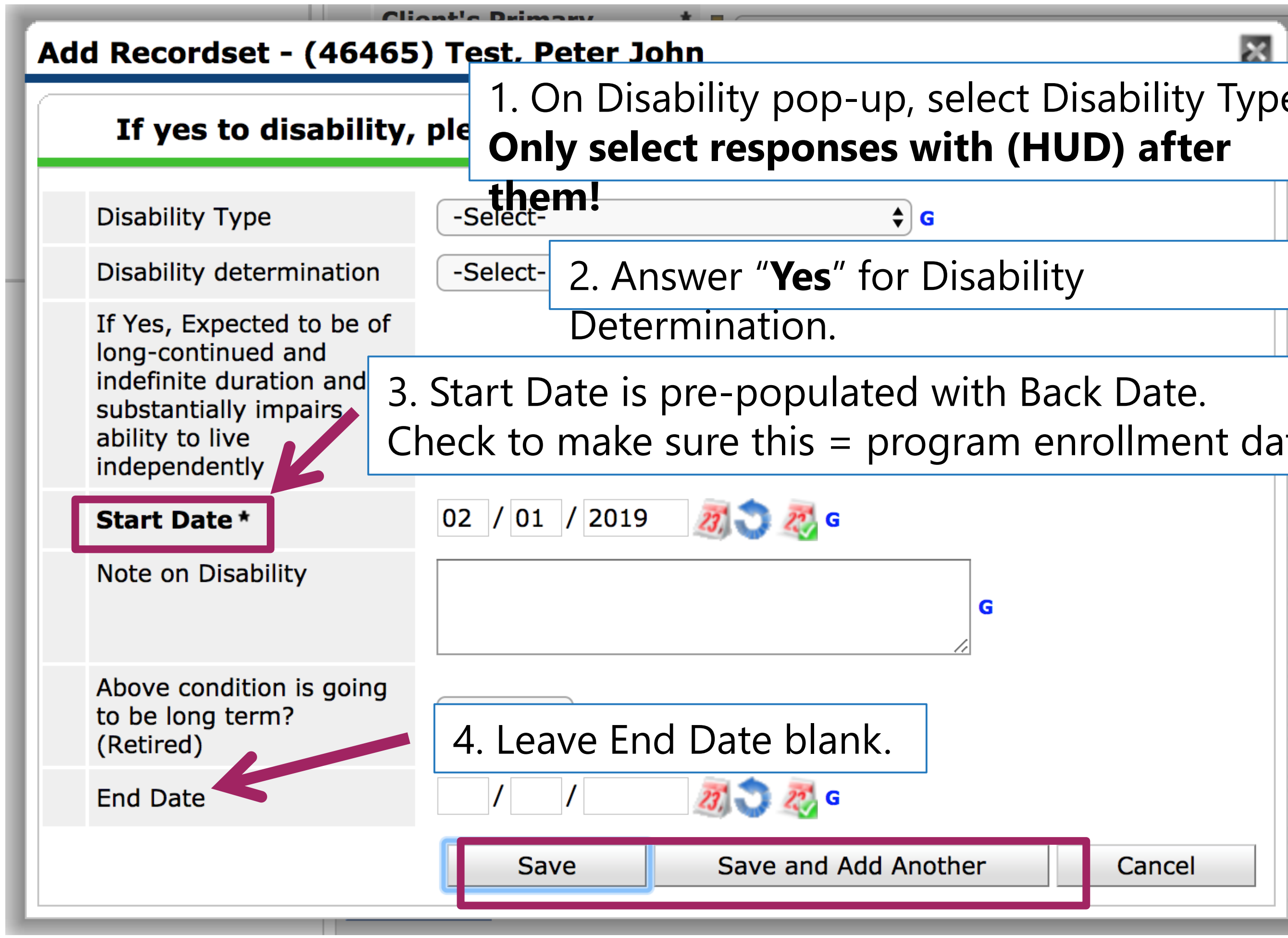
Entry Assessment – Disabling Conditions

If you answered **"Yes"** to **Does the Client Have a Disabling Condition,** click **"Add."**



1. On Disability pop-up, select Disability Type. **Only select responses with (HUD) after them!**

2. Answer "**Yes**" for Disability Determination.

3. Start Date is pre-populated with Back Date. Check to make sure this = program enrollment date.

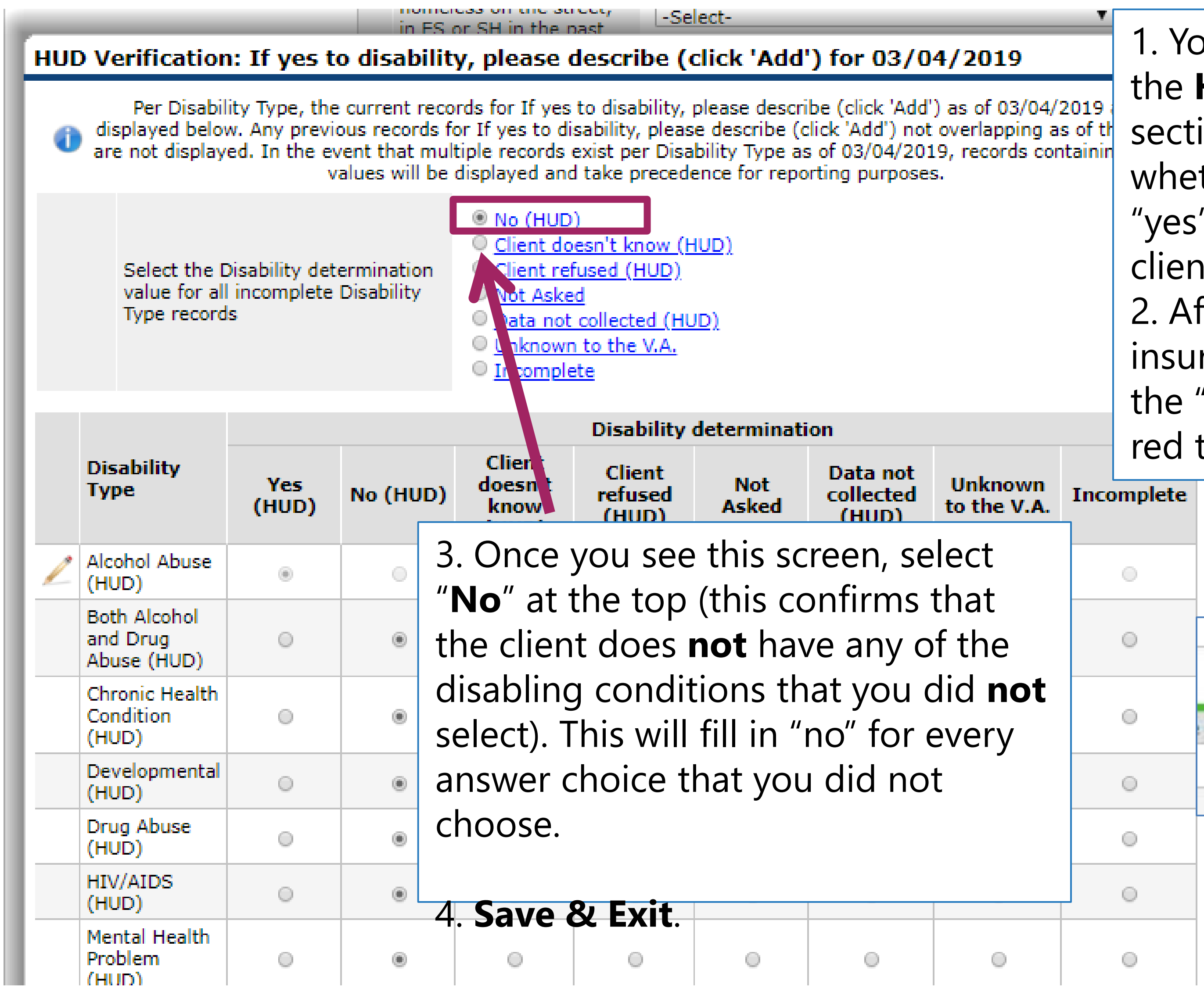
4. Leave End Date blank.

5. If client has more than one disabling condition, click "**Save and Add Another.**" Otherwise, just click "**Save.**"
6. After **saving**, click the Red Triangle to complete HUD Verification.

Entry Assessment – Disabling Conditions

- Remember: information in HMIS is **self-reported**. If client reports no disabling conditions, *even if* you know they have a disabling condition, you should record their response as "No." This can be updated later, if they choose to share that information.
- Do not record client's specific diagnosis anywhere in HMIS!
- Only choose options with (HUD) after them.
- If client reports both Alcohol *and* Drug Abuse, enter **separate records** for Alcohol Abuse (HUD) and Drug Abuse (HUD).
- If client reports more than one disabling condition in a single category, enter **multiple records** with the same Disability Type (e.g., Bipolar Disorder & Generalized Anxiety Disorder → two "Mental Health Problem (HUD)" responses).

HUD Verification



1. You must complete the **HUD Verification** sections (regardless of whether you answered “yes” or “no” that the client received any).
2. After adding any insurance source, click the “**HUD Verification**” red triangle.

3. Once you see this screen, select “**No**” at the top (this confirms that the client does **not** have any of the disabling conditions that you did **not** select). This will fill in “no” for every answer choice that you did not choose.

4. **Save & Exit**.

5. You’ll end up with a **green check**!

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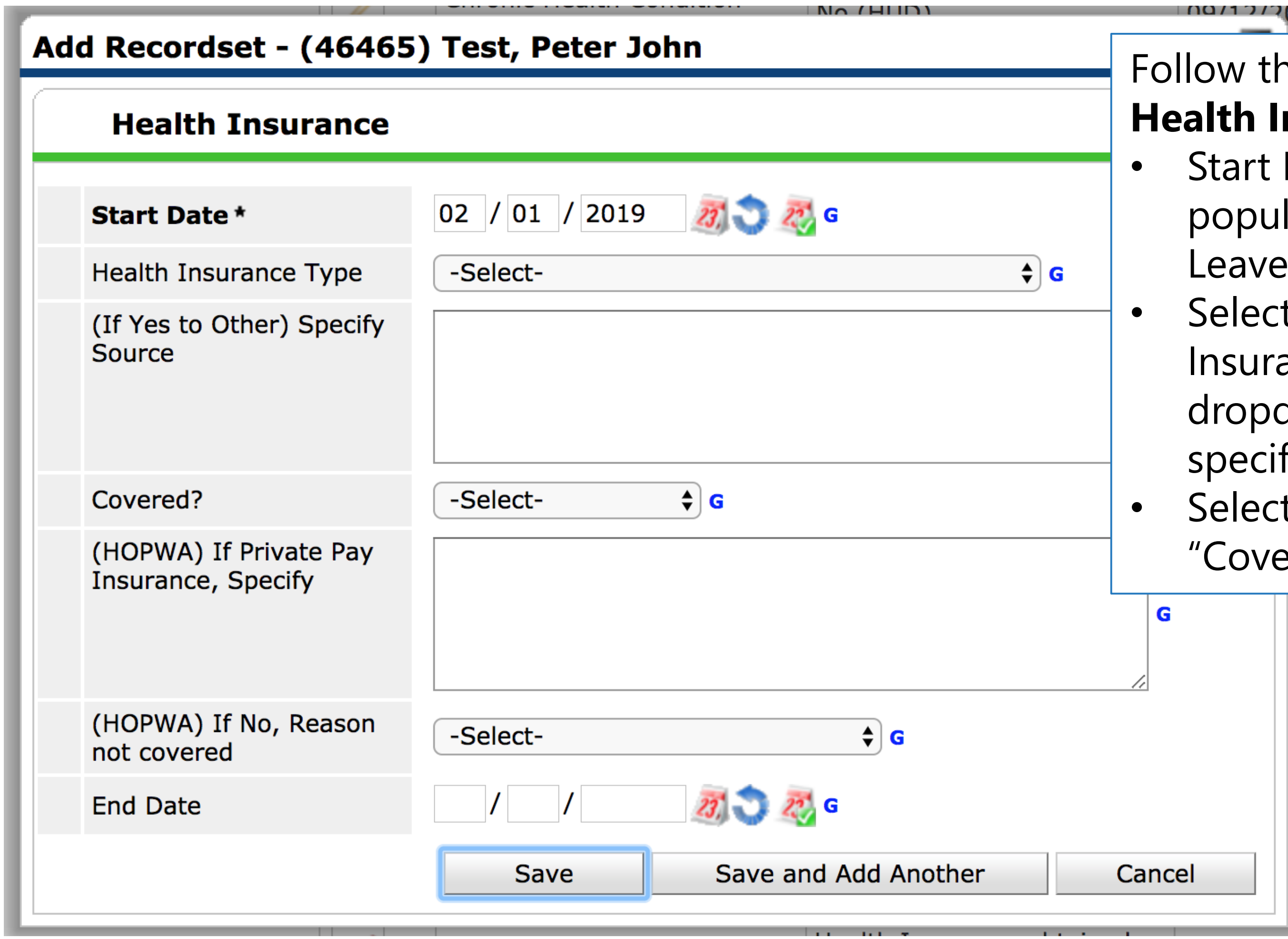
Entry Assessment – Health Insurance



Follow the same steps for **Health Insurance.**

- Start Date auto-populates to Back Date. Leave End Date blank.
- Select the Health Insurance Type from the dropdown (if "Other," specify.)
- Select "**Yes**" for "Covered?"

Don't forget HUD Verification!

HUD Verification

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Entry Assessment - Section 2

Choose where the CE Intake took place. There is a drop down with numerous options.

Section (2): Complete for Head of Household

Where did the CE intake take place? Catholic Charities G

Case Notes/Details:

Date of Case Note: *	Case Notes:	Navigator Assigned:
Add		

Does the household want to work towards permanent housing? Yes G

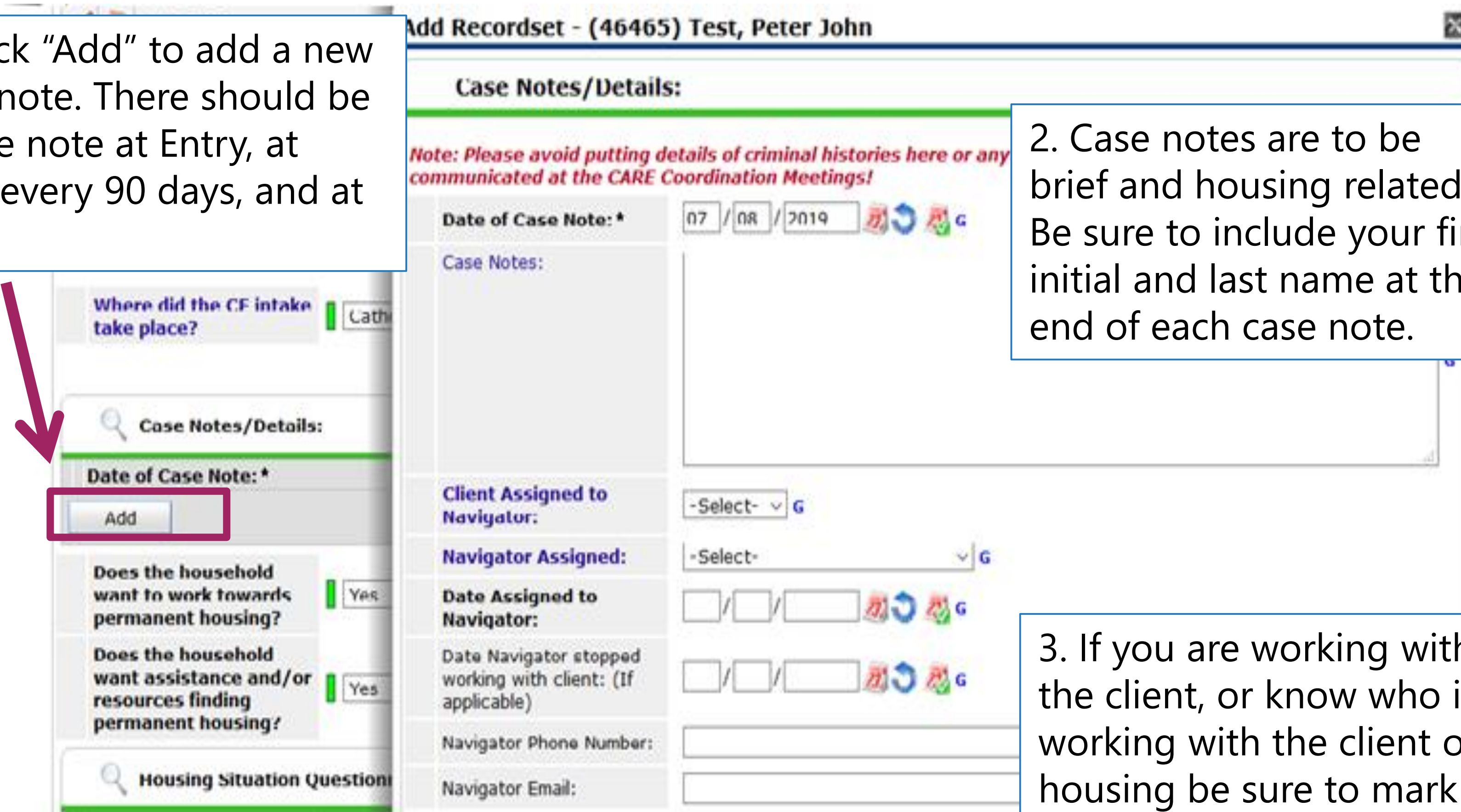
Does the household want assistance and/or resources finding permanent housing? Yes G

Housing Situation Questionnaire

Date of Housing Status:	Where did you sleep last night?	Where do you plan to stay tonight?	Has a (3)-day notice been issued?	Upcoming Court Date:
Add		No matches.		

Entry Assessment: Section 2

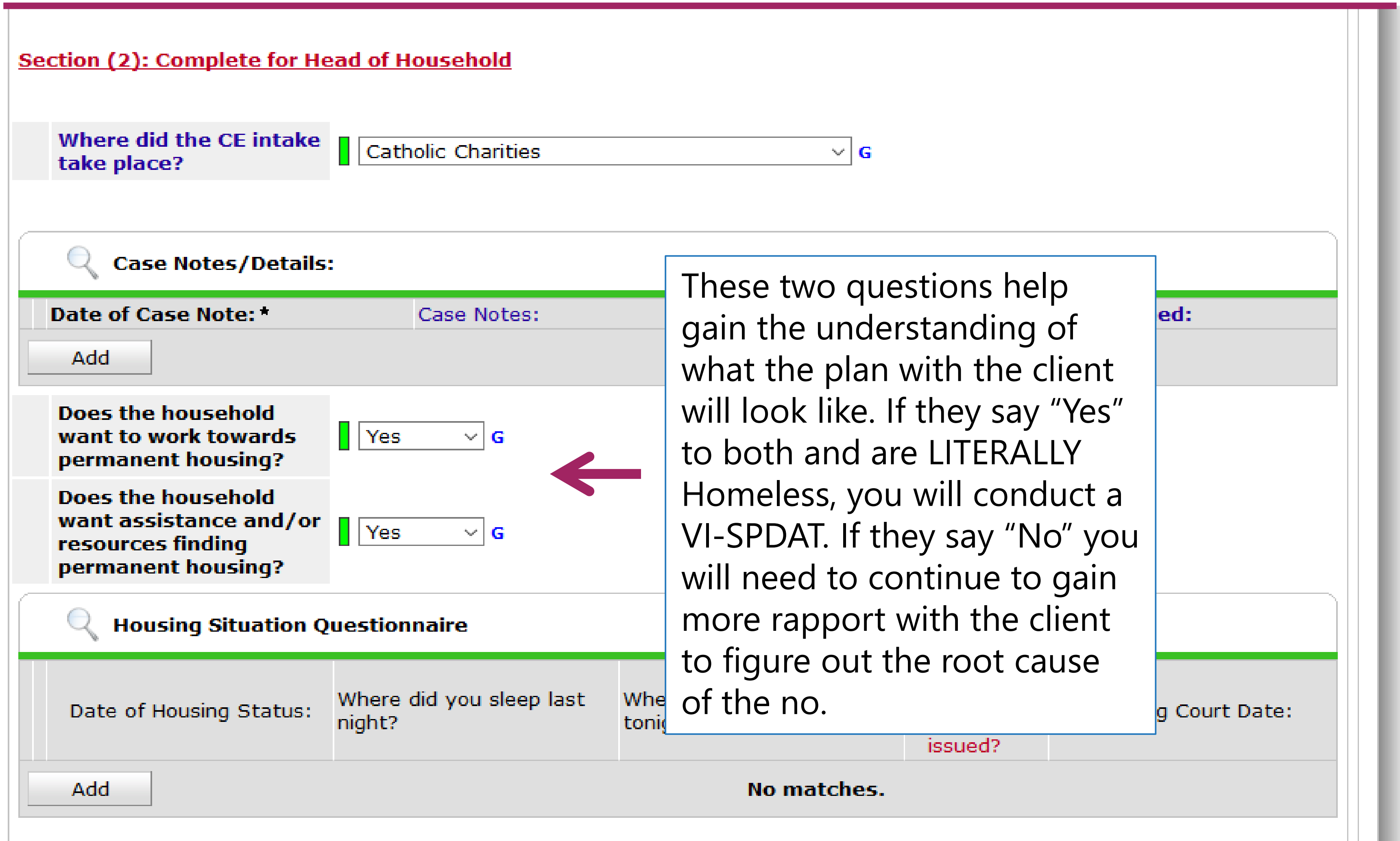
1. Click "Add" to add a new case note. There should be a case note at Entry, at least every 90 days, and at Exit.



2. Case notes are to be brief and housing related. Be sure to include your first initial and last name at the end of each case note.

3. If you are working with the client, or know who is working with the client on housing be sure to mark them as the navigator with the appropriate contact information.

Entry Assessment: Section 2



These two questions help gain the understanding of what the plan with the client will look like. If they say "Yes" to both and are LITERALLY Homeless, you will conduct a VI-SPDAT. If they say "No" you will need to continue to gain more rapport with the client to figure out the root cause of the no.

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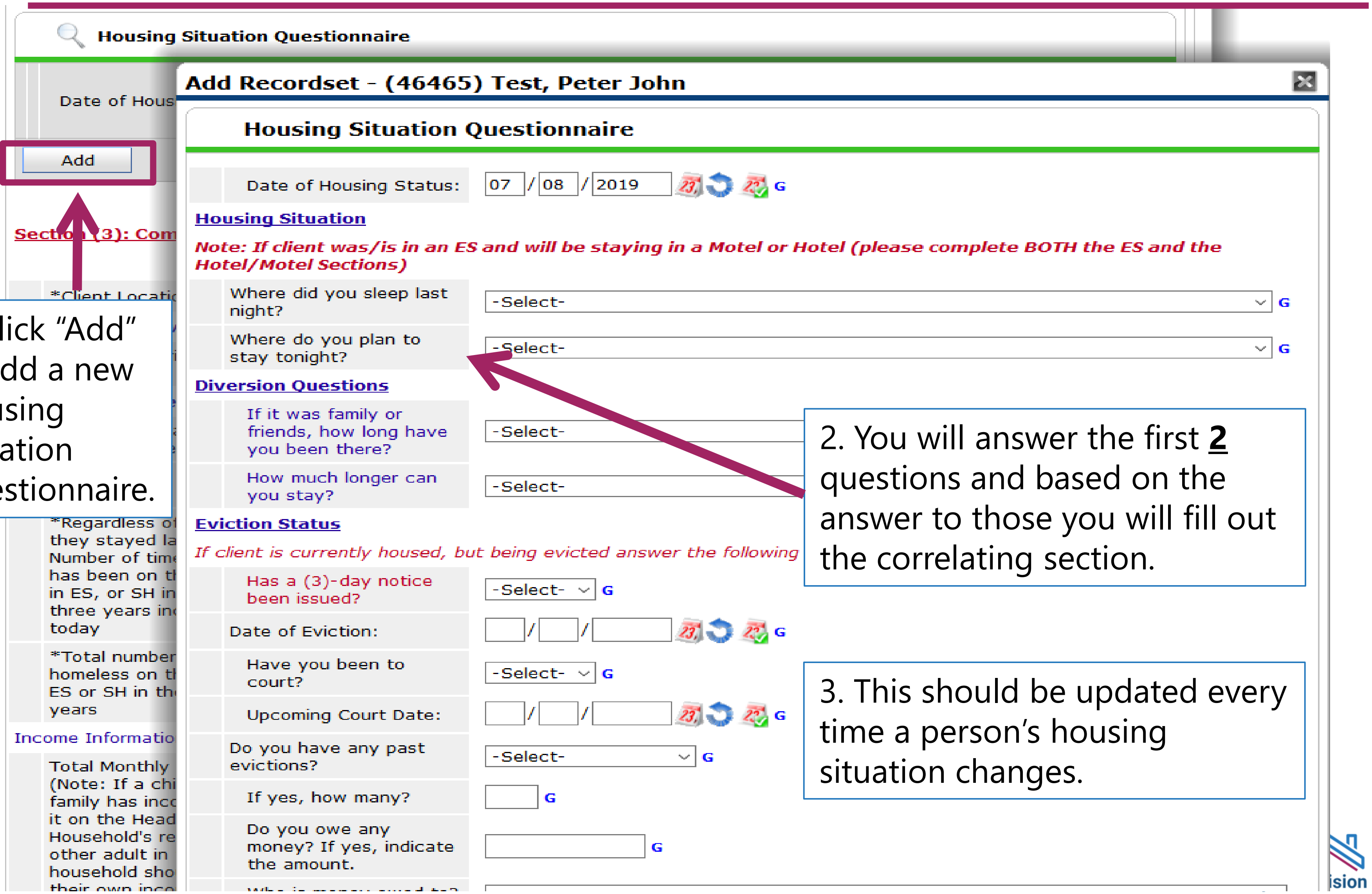
Entry Assessment: Section 2



1. Click “Add” to add a new Housing Situation Questionnaire.

2. You will answer the first **2** questions and based on the answer to those you will fill out the correlating section.

3. This should be updated every time a person’s housing situation changes.

Entry Assessment – Homeless History

Section (3): Complete for All Adults (including He

1. Client Location is ALWAYS TN-504.

*Client Location	TN-504 G

Indicate below where the client spent the night prior to entering the program:

*Residence Prior to Project Entry	Place not meant for habitation (HUD) G

2. Residence prior to project entry is asking *where did the client sleep last night.* Based on how you respond questions pertaining to that response will populate.

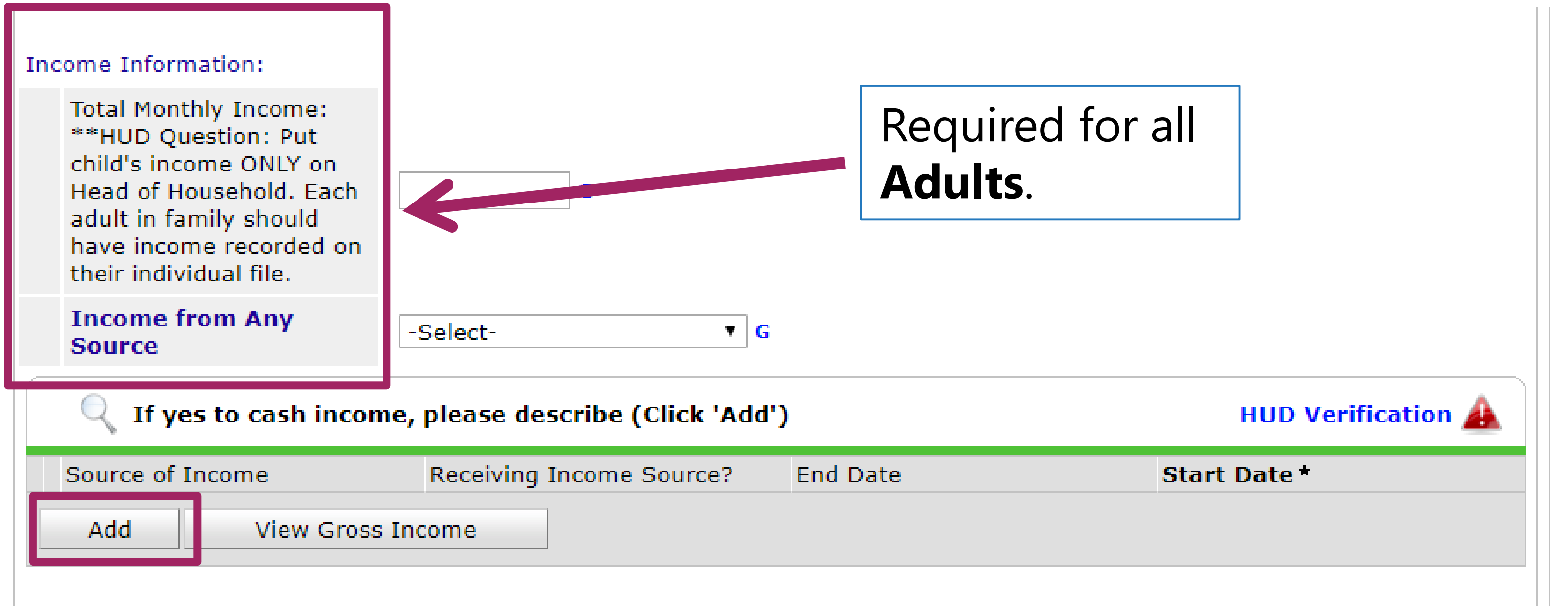
How long did they stay there?

*Length of Stay in Previous Place	One month or more, but less than 90 days G
*Approximate date homelessness started:	04 / 01 / 2019 G
*Regardless of where they stayed last night - Number of times the client has been on the streets, in ES, or SH in the past three years including today	Two times (HUD) G
*Total number of months homeless on the street, in ES or SH in the past three years	7

3. Length of Stay in previous place, is how long has the person been in the placement that was entered in the Residence Prior to Project Entry field.

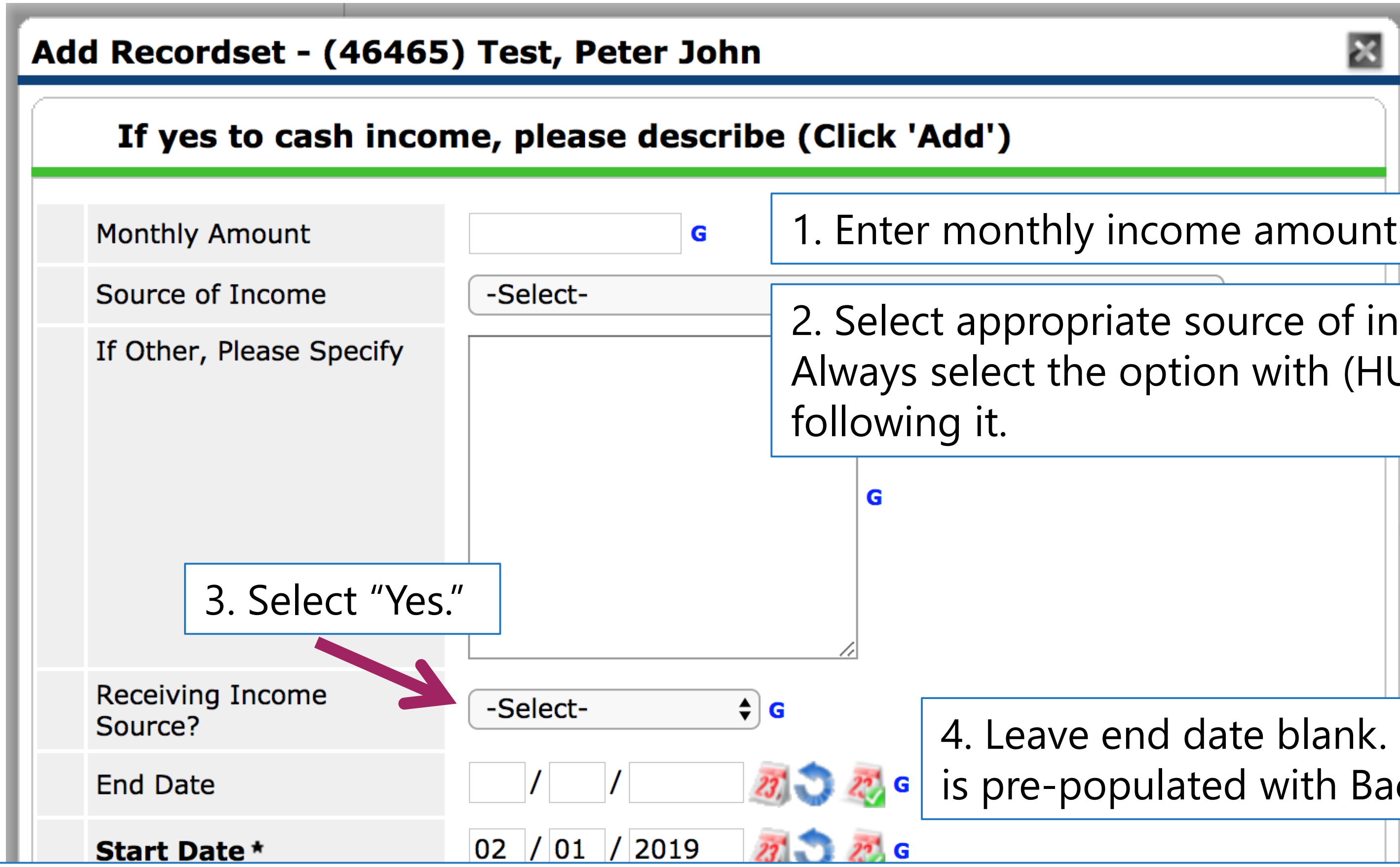
4. Approximate date homelessness started, is for this episode of homelessness

Entry Assessment – Income



2. If a client has no income, complete **HUD Verification** and select "No" for all sources.
3. If the client has income, select **Add**. A pop-up window will appear (following slide).

Entry Assessment – Income



1. Enter monthly income amount.

2. Select appropriate source of income. Always select the option with (HUD) following it.

3. Select "Yes."

4. Leave end date blank. Start Date is pre-populated with Back Date.

NOTE: If the client already has an income source listed in their entry assessment, but they are no longer receiving it, click on the pencil next to that income source to edit. Add an **end date** of <u>the day before program enrollment date</u>. Leave "Receiving Income Source?" as "**Yes**."

Don't forget **HUD Verification!**

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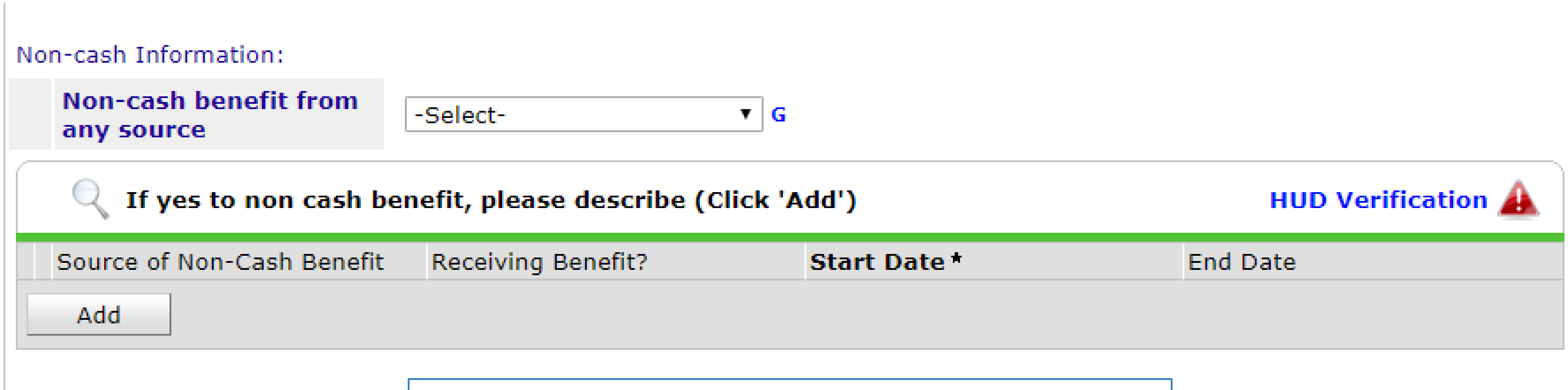
Entry Assessment – Income

- Income = **regular**, **recurring** sources of income
  - Lump sums should *not* be recorded (e.g., disability back-payment, court settlement)
  - Very sporadic work should *not* be recorded
- If needed, take the average of several months' paystubs to determine a monthly amount.
- Food Stamps are <u>*not*</u> Income (those are recorded as Non-Cash Benefits).
- If a minor child in the household receives income (e.g., through a job, disability), record that in the Head of Household's assessment.

Entry Assessment – Non-Cash Benefits



Follow the same steps for **Non-Cash Benefits.**

NOTE: If the client already has a non-cash benefit source listed in their entry assessment, but they are no longer receiving it, click on the pencil next to that income source to edit. Add an **end date** of <u>the day before program enrollment date</u>. Leave “Receiving Income Source?” as “**Yes**.”

Don’t forget **HUD Verification!**

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Entry Assessment – DV Questions

If you answer "Yes" to the first question, you need to answer the remaining questions. The questions build off one another.

Domestic Violence History:

Is Client a Survivor of Domestic Violence?	-Select- G
If yes for Domestic violence victim/survivor, when experience occurred	-Select- G
If yes for Domestic Violence Victim/Survivor, are you currently fleeing?	-Select- G
If client is currently fleeing domestic violence, please provide description for safety plan if household in danger!	G

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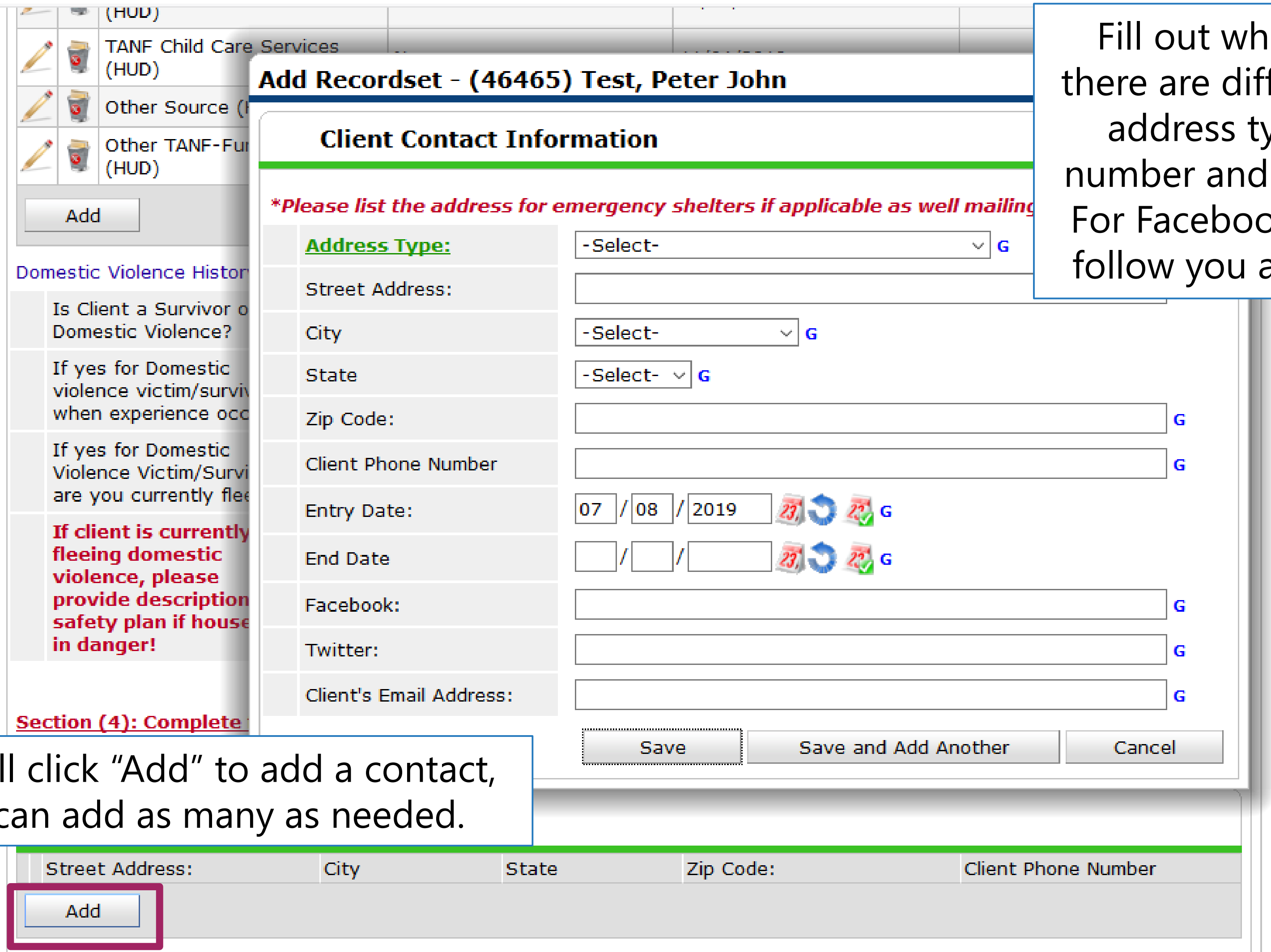
Entry Assessment – Client Contact Information

Fill out what you have, there are different types of address types. Phone number and email are key. For Facebook and Twitter, follow you agency policy!

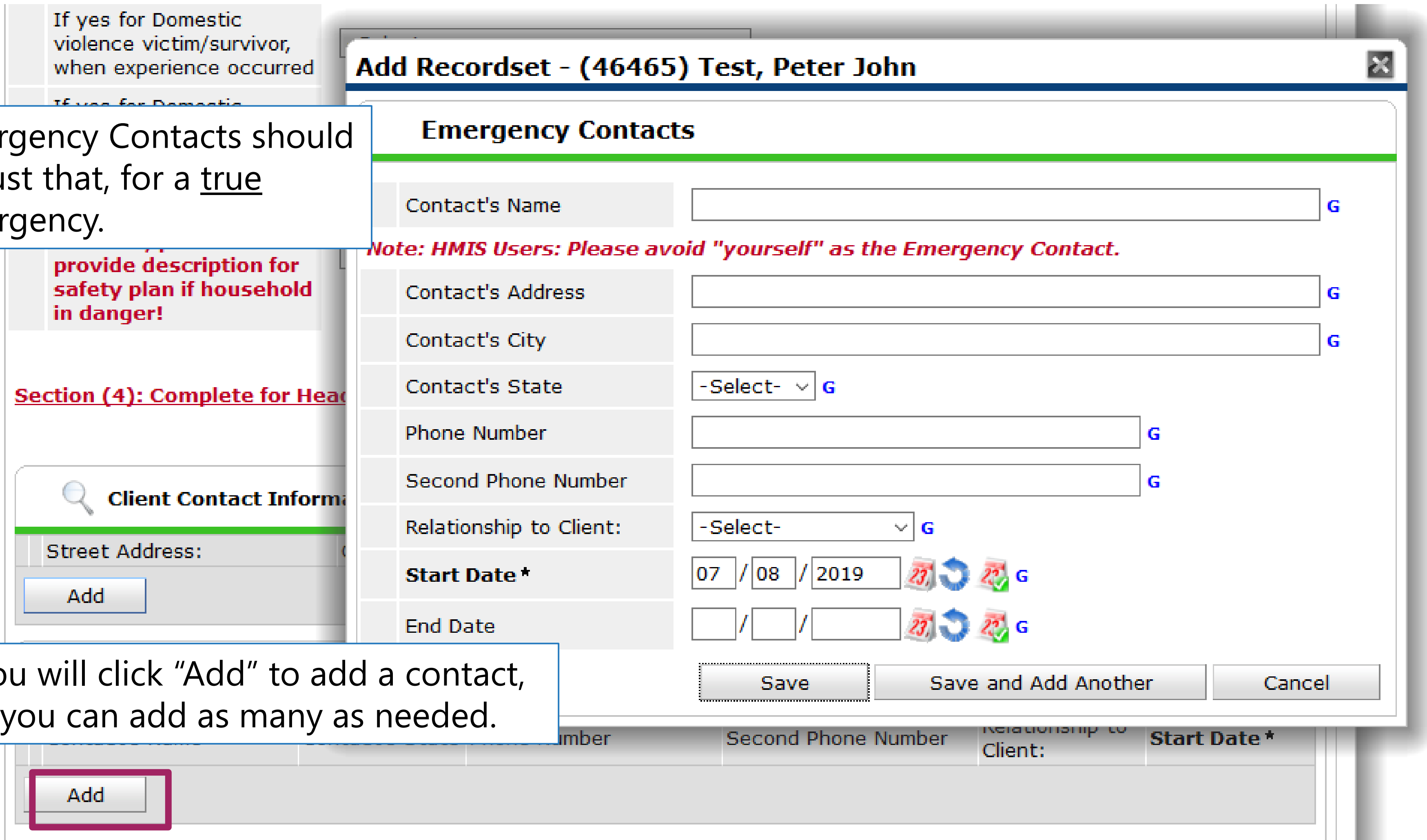


You will click "Add" to add a contact, you can add as many as needed.

Homeless Impact Division

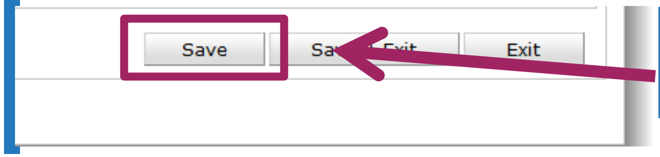
Entry Assessment – Emergency Contacts

Emergency Contacts should be just that, for a true emergency.

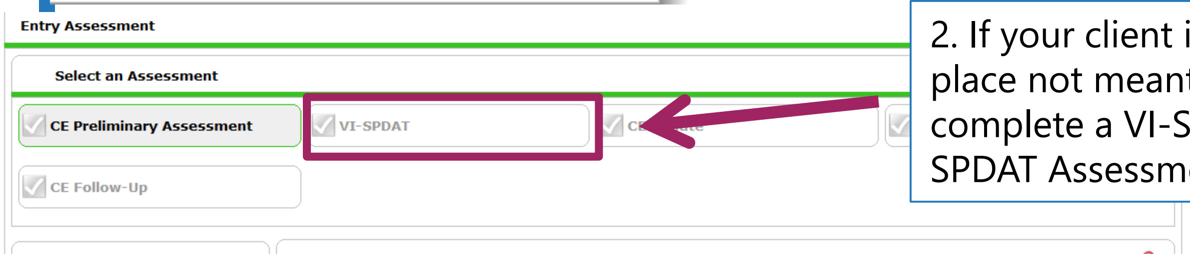


You will click "Add" to add a contact, you can add as many as needed.

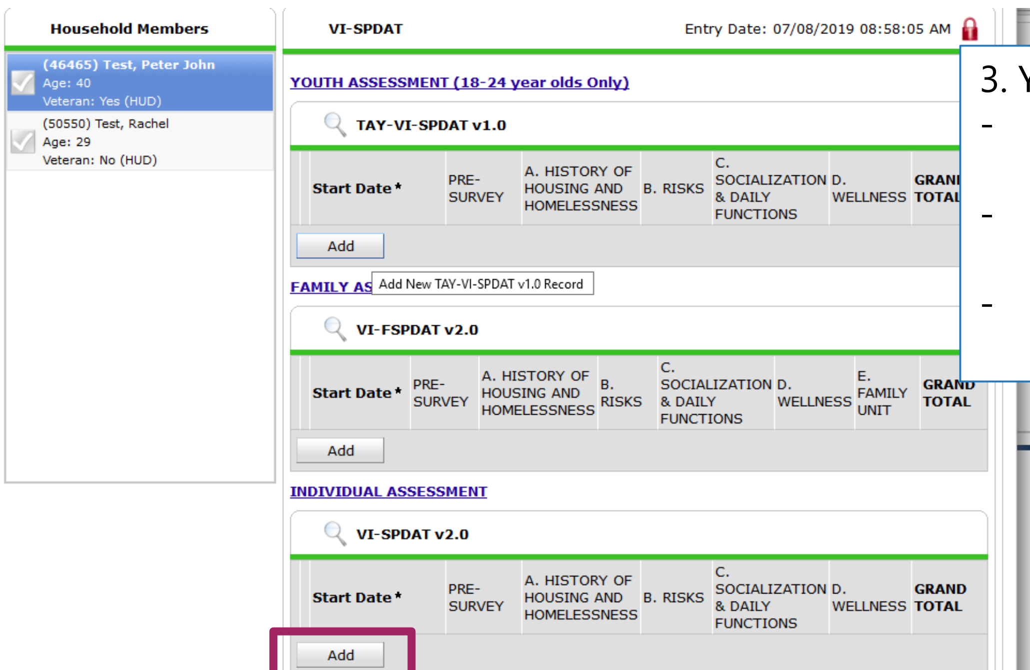
Entry Assessment – VI-SPDAT



1. Make sure to click "save" at the end of the assessment. You will then scroll all the way to the top.

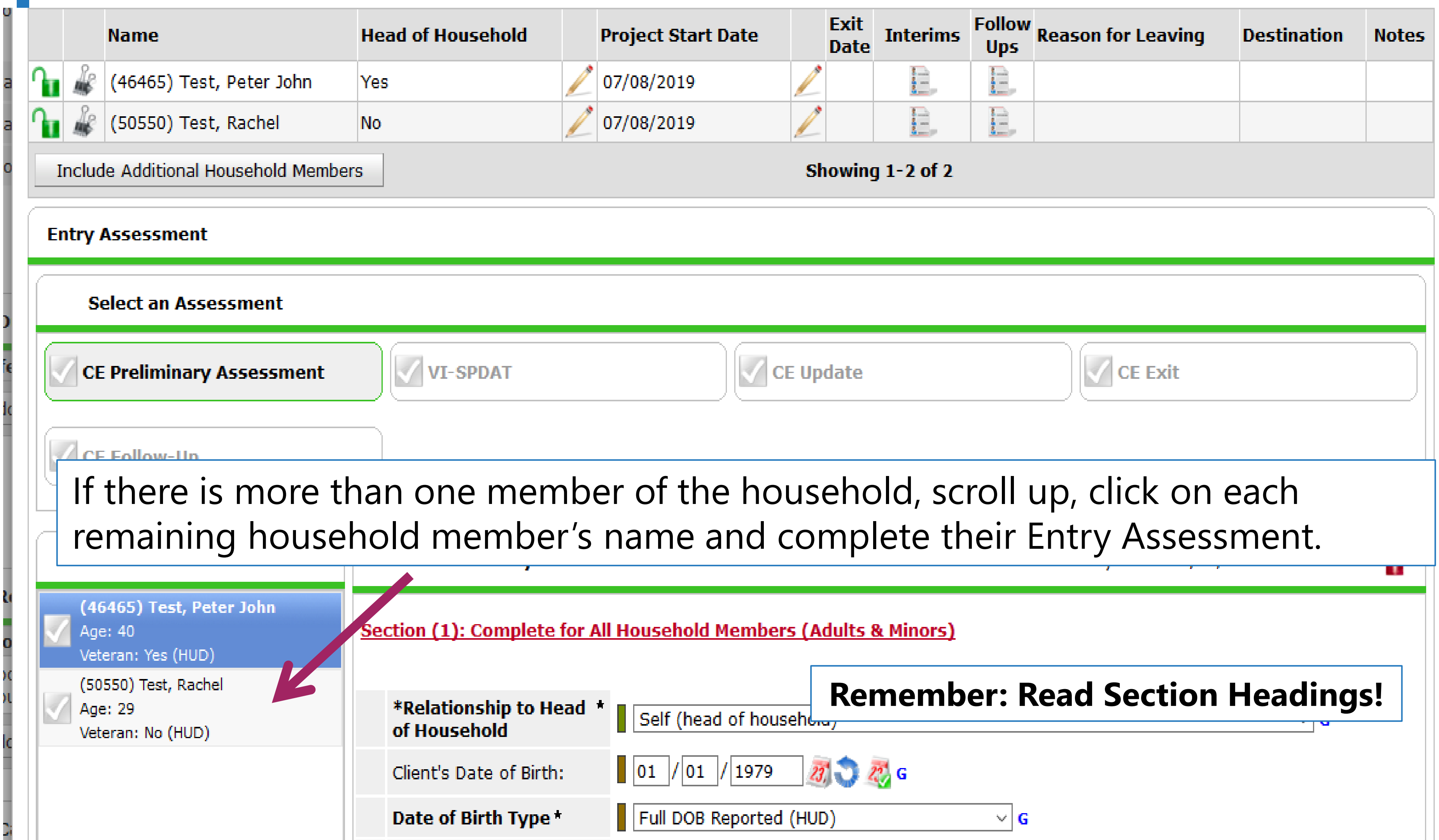


2. If your client is literally homeless (street, shelter, place not meant for human habitation you will complete a VI-SPDAT. Make sure to click on the VI-SPDAT Assessment Tab.



3. You will "add" the appropriate VI-SPDAT.
- TAY-VI-SPDAT for INDIVIDUALS 18-24 years old.
- VI-FSPDAT is for FAMILIES WITH MINOR CHILDREN
- VI-SPDAT is for INDIVIDUALS, can include couples, families with just adults, etc.

Entry Assessment – Other Household Members



If there is more than one member of the household, scroll up, click on each remaining household member's name and complete their Entry Assessment.

Remember: Read Section Headings!

Entry/Exit Tab

- Updates
- Exits

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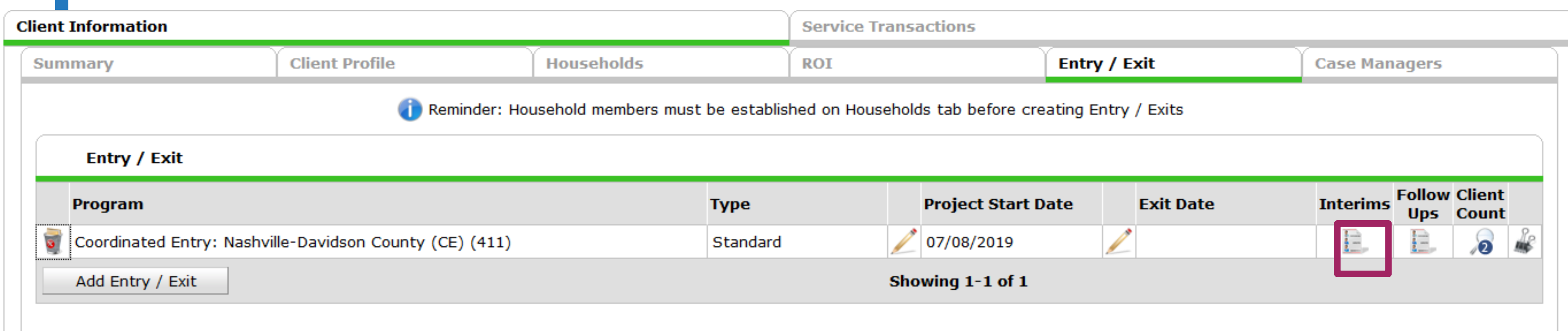
Entry/Exit Tab – Updates

1. Choose appropriate **Enter Data As** mode.
2. ClientPoint: Enter HMIS ID in “Client ID #” field to directly locate the client’s record.
3. Back Date Mode: **Back date to date of Update**. This could be the date you met with a client, called a client, learned of changes in client information, etc.
4. Click on “Entry/Exit” Tab.
5. Click on form icon under “Interims.”



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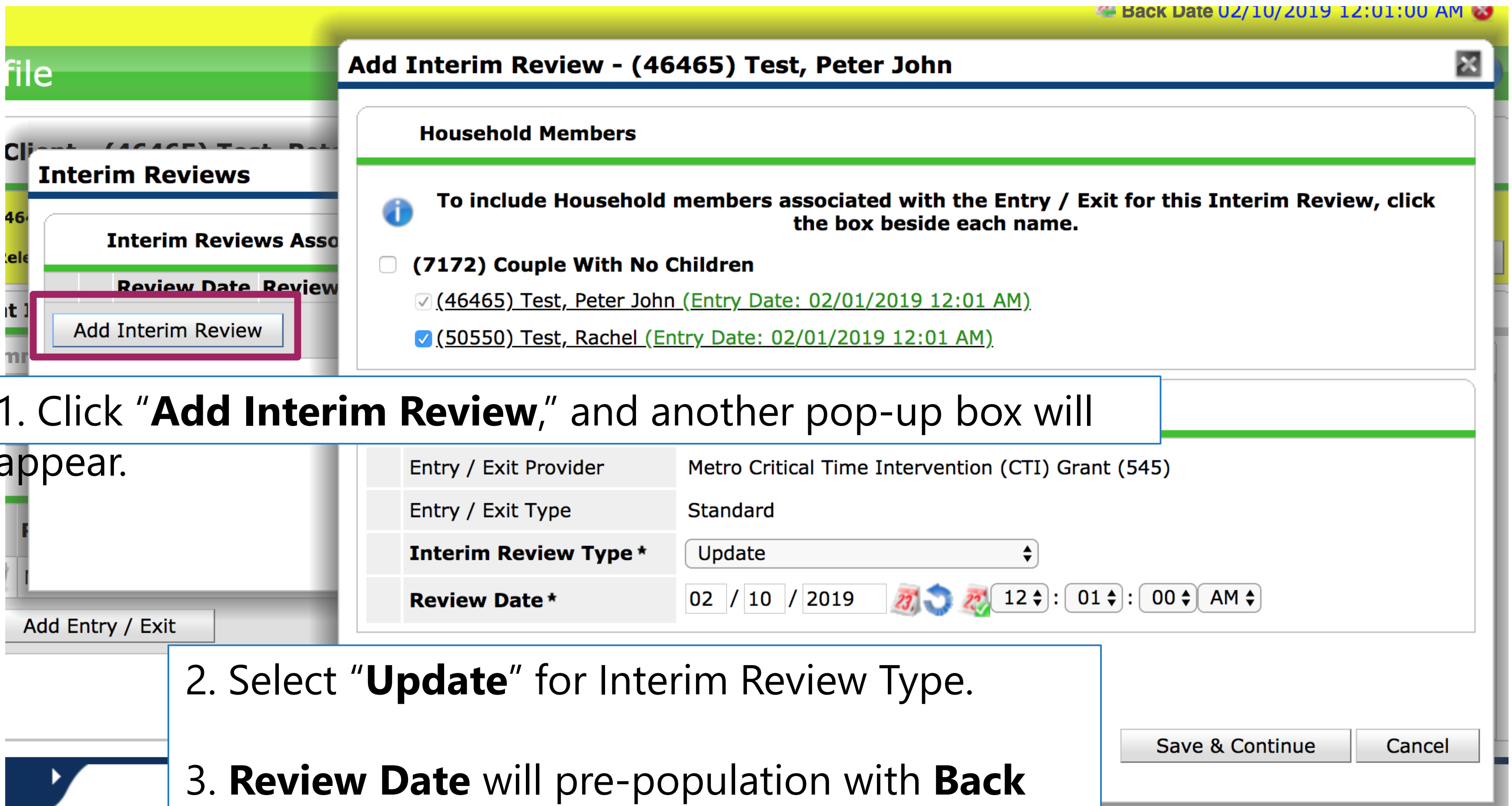
Entry/Exit Tab – Updates



1. Click "**Add Interim Review**," and another pop-up box will appear.

2. Select "**Update**" for Interim Review Type.

3. **Review Date** will pre-population with **Back Date**. Do not change date or time stamp.

4. Save & Continue.

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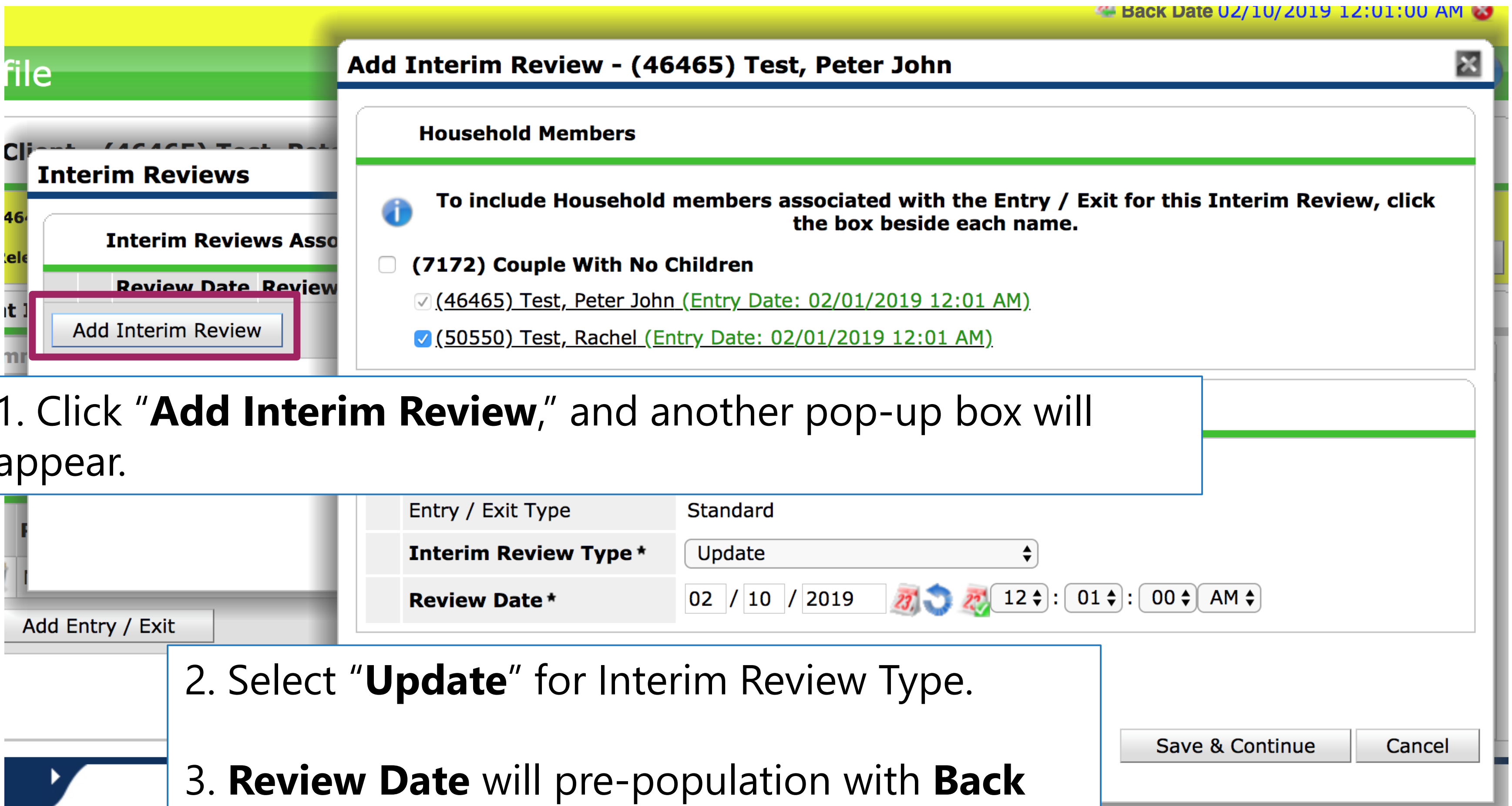
Entry/Exit Tab – Updates



1. Click "**Add Interim Review**," and another pop-up box will appear.

2. Select "**Update**" for Interim Review Type.

3. **Review Date** will pre-population with **Back Date**. Do not change date or time stamp.

4. Save & Continue.

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Entry/Exit Tab – Updates

1. When the Update Assessment loads you will notice it looks very similar to the Entry Assessment. All fields will be pre-populated with information from the Entry Assessment.
2. Update anything and everything that has changed since the entry.
3. Do not change *previous* Case Notes, housing situations, and contacts – just **add new ones**.
4. Remember to **also** add a Case Note, indicating any updates and any changes that were made.

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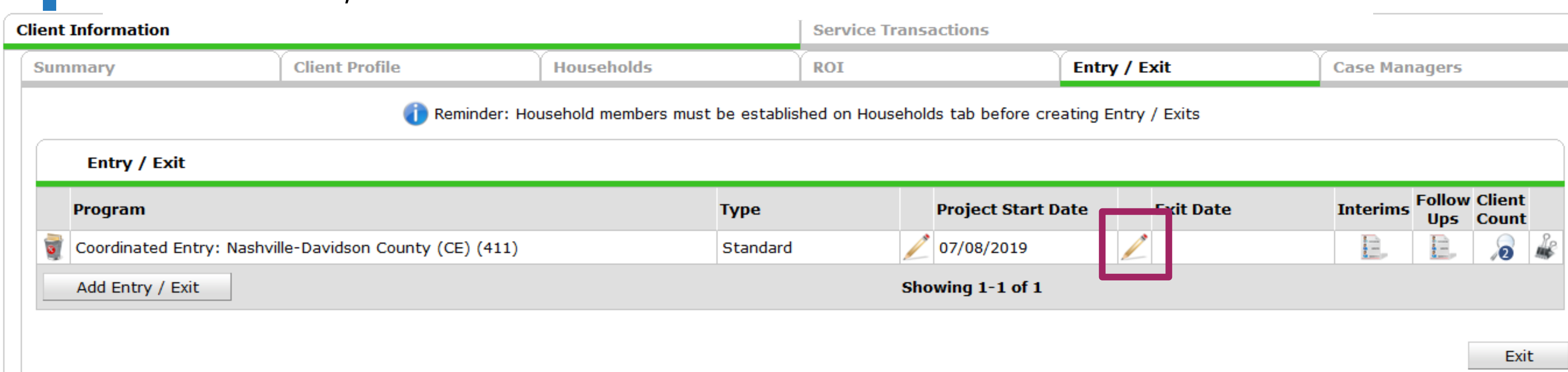
Entry/Exit Tab – Exit Assessment

1. Choose appropriate **Enter Data As** mode.
2. ClientPoint: Enter HMIS ID in “Client ID #” field to directly locate the client’s record.
3. Back Date Mode: **Back date to Exit Date**.
4. Click on “Entry/Exit” Tab.
5. Click on pencil icon under “Exit Date.”
6. Remember for CE you should not exit a person unless they are permanently housed or being marked as inactive. If they are exiting your program due to non-compliance but are still homeless, **DO NOT EXIT THEM FROM CE**.



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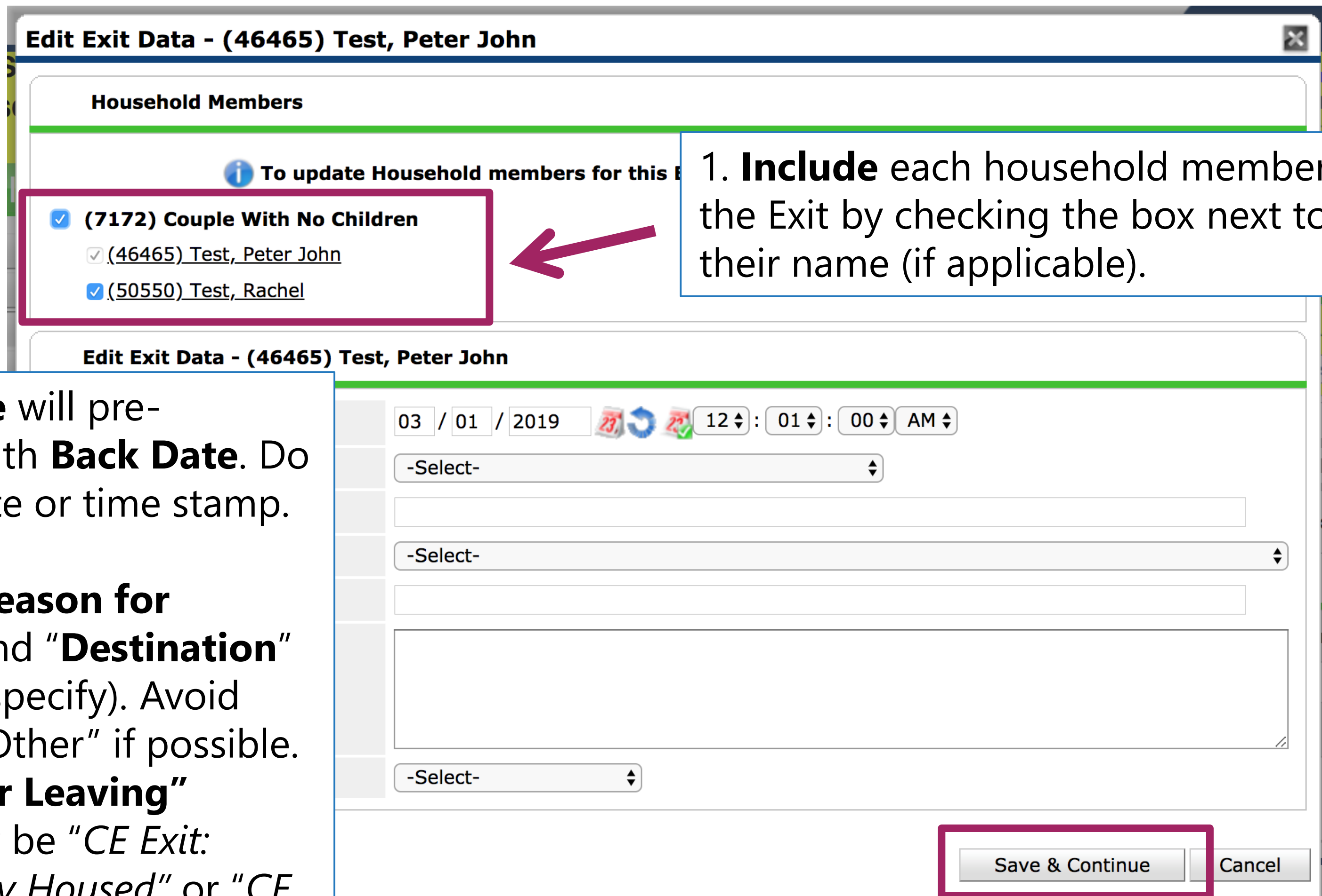
Exiting a Client



1. **Include** each household member in the Exit by checking the box next to their name (if applicable).

2. **Exit Date** will pre-populate with **Back Date**. Do not edit date or time stamp.

3. Select "**Reason for Leaving**" and "**Destination**" (if "Other," specify). Avoid choosing "Other" if possible. "**Reason for Leaving**" should only be "*CE Exit: Permanently Housed*" or "*CE Exit: Inactive.*"

4. Save and Continue.

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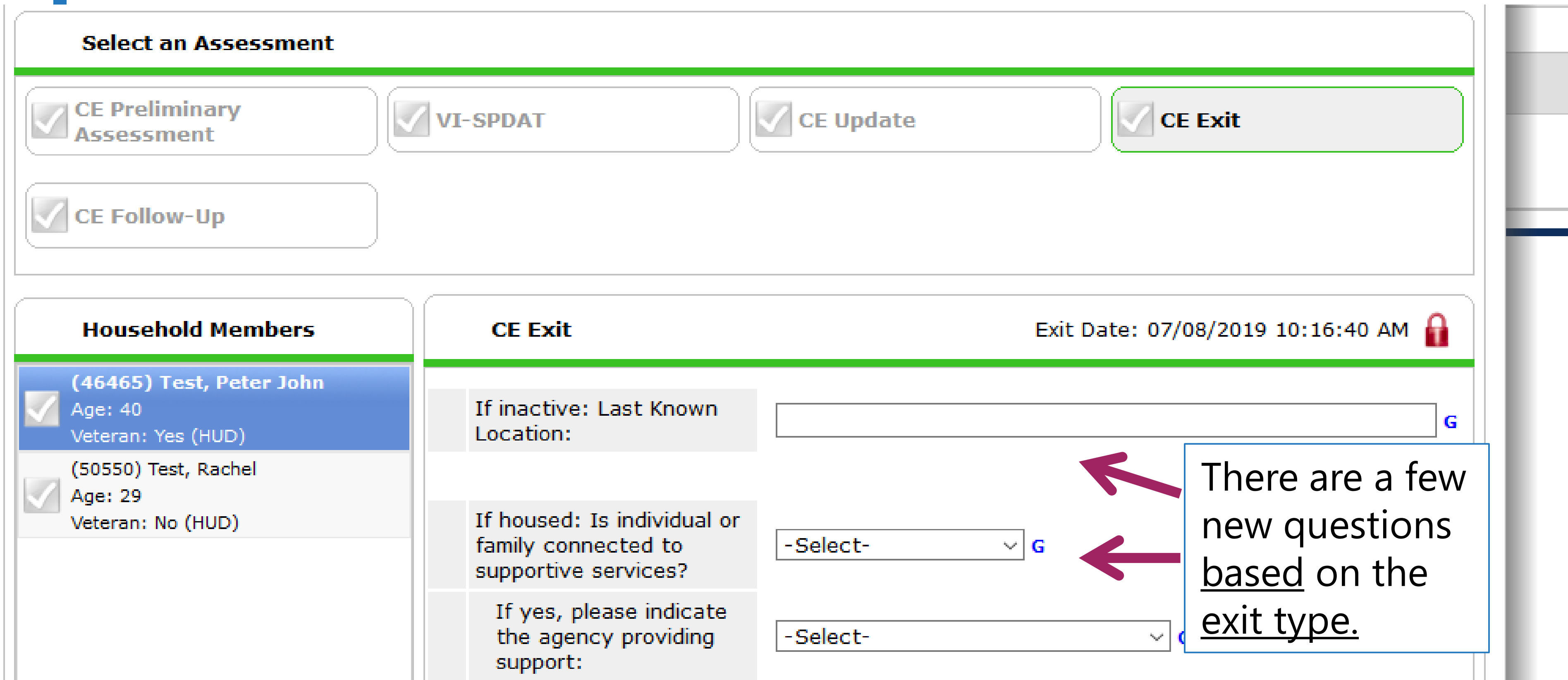
Exiting a Client



There are a few new questions <u>based</u> on the <u>exit type.</u>

- The Exit Assessment looks similar to the Entry Assessment. All fields will be pre-populated with information from the Entry Assessment or the last update.
- If no exit interview was completed (e.g., because client disappeared), do NOT update any fields. Leave all fields as they were at entry.
- Make any necessary changes to Disabling Condition, Health Insurance, Income, Non-Cash Benefits, and DV status for **all** household members

Questions?

Contact the HMIS Help Desk:

HMISHelp@Nashville.gov

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