NW COC DIVERSION ENTRY INSTRUCTIONS

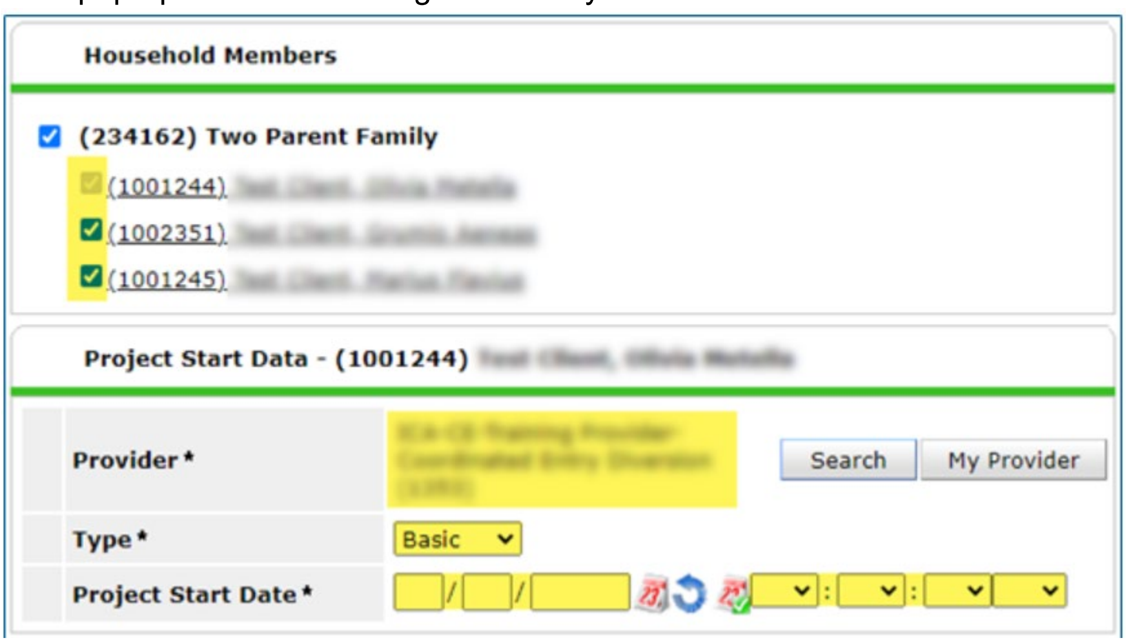
In HMIS, search for an existing record for your client. Search using both name and Social Security number.

- If there is a matching record with a 6-digit number, do not use it. Create a new record. (refer to your HMIS
- If there is a matching record, check to see if SHARED is recorded in the Alias field.
- If you created the Client record and the client has agreed to Share, add SHARED in the client Alias section.
- Update existing HH information in the Client Profile or Households Tab. Add additional Household Members.
- For questions on entering households into HMIS, refer to the General HMIS Instructions or Households How-to Guide in the Forms and Instructions found in hmismn.org.

1. Create a new Entry/Exit

a. Be sure your EDA is your Diversion provider.
b. Select “Use Current System Date”
c. Make sure you are in the Head of HH record.
d. Click on the Entry/Exit tab, then select Add Entry.
   - If this is an existing record, verify that there is not an open Diversion Entry from a NW CoC agency. If there is an open Diversion Entry from NW CoC, do not create a new entry. Contact the original agency to discuss updates, or contact the Priority List Manager with questions.

e. Make the following selections (highlighted in the example below) in the Project Start Date pop-up before continuing to the entry assessment:



- Household Members – If this is an existing record, check the box next to the name of every household member that is being served with the Head of Household.
- Provider: Your Diversion provider should be filled in automatically.
- Type: Select **Basic**.
- Project Start Date: The date of your initial conversation with the client. Adjust the time to 12:00:00 a.m.

2. Coordinated Entry Assessment (Sub-Assessment)

Coordinated Entry Assessment

	Date of Assessment *	End Date	Assessor's Name	Assessor's Organization	Assessment Level	Prioriti Status
	03/14/2020		Jane Smith	MN Street	Housing Needs Assessment	Placed Prioriti List
	01/01/2020	03/13/2020	Jane Smith	MN Street Outreach Program	Housing Needs Assessment	Not Pla on Prioriti List

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a. Make sure you are in the Head of HH record and that you are in the Diversion Provider.
b. Fill out the entry assessment as accurately and completely as possible.
c. **If it is a multi-person household, complete the assessment for the head of household only**.
d. If there is an existing assessment without an end date, edit that row and put an end date using the day before your assessment. Do not put an end date to your new row as it contains the latest information.
e. When adding a new assessment, complete the following fields:
    - Date of Assessment - the date of your conversation with the client.
    - Assessment Location - the location where the conversation was held.
    - Assessor Details – your name, phone etc.
    - Assessment Type – select the most accurate option
    - Assessment Level – **Select Housing Needs Assessment**
    - Prioritization Status: If the client is going to be immediately entered (same day) in Coordinated Entry, you will choose "Placed on Priority List". If you are going to keep the diversion open for more than a day, choose "Not Placed On Priority List"
    - Choose Save

3. Coordinated Entry Event (Sub-Assessment)

The only time you will create a Coordinated Entry Event is when you are creating a Diversion entry. This sub-assessment is also used to track housing referrals, and if the client has been on Coordinated Entry in the past, there may be other lines with past referrals showing. Do not make any changes to housing referrals you find in this Sub-Assessment.

a. Go to the Coordinated Entry Event
b. Choose Add
c. Complete only these 3 fields (highlighted in yellow in example below)
    - Start Date (date of conversation with HH

- Date of Event (same as start date)
- Event – **Choose Problem Solving/Diversion/Rapid Resolution intervention or service.**
- Save
- DO NOT ENTER INFORMATION in the Priority List Manager Referral Details.

4. Client Information

a. Complete all fields in the Client Information.
   - Income information should be entered using the HUD Verification.
   - Where it asks for Contact Information, be sure to get multiple forms of contact including a mailing address (if possible)
   - add the Case Conferencing Release of Information Date in the Contact Information.
   - Include notes in the Assessor Notes section.

b. When you have entered all of the assessment and contact information, choose Save and Exit.

5. EXIT FROM DIVERSION

Exit the client from Diversion before you enter them into Coordinated Entry.

Click on Enter Data As and select your Diversion provider. Make sure you are in the Head of HH record.

Click on the Edit Pencil under the Exit Date for the Diversion record. When the back date mode pop-up appears, choose Use Current System Date.

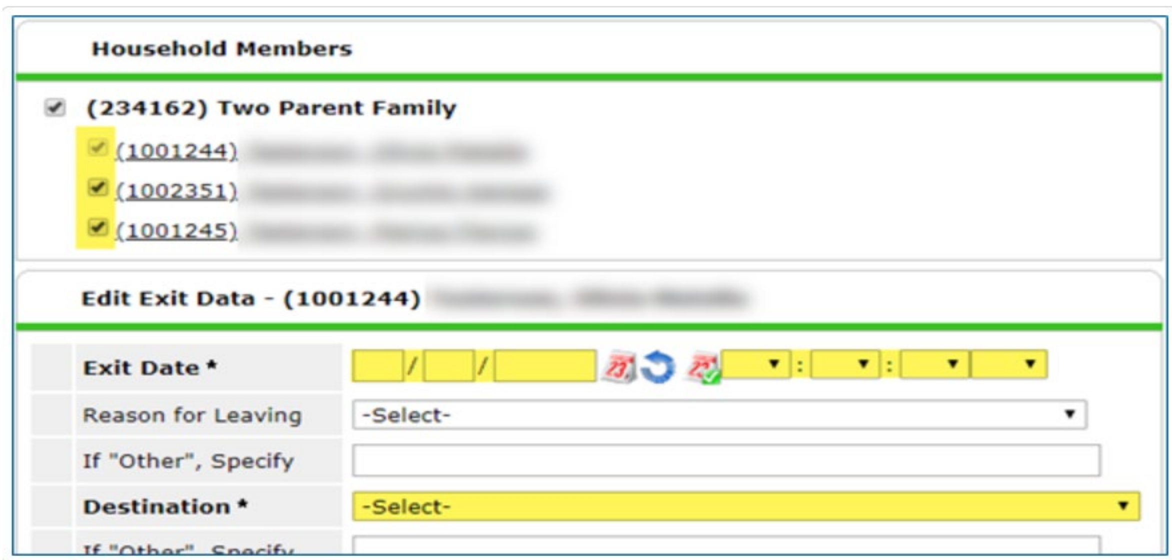
Fill out the following 3 fields in the Edit Exit Data pop-up before continuing to the exit assessment. They are high-lighted in yellow in the example below.

1. Household Members: check the box next to every HH member attached to the entry.
2. Exit Date: The date you are closing the entry.
   a. **Exit Same Day as Entry**: Some reasons for same-day exit would be:
      - HH is going to exit immediately to Coordinated Entry
      - HH is over-income for services.
      - HH declines homeless services

b. **<u>Exit at Service End</u>**: If your agency is able to continue working with the client after the initial conversation, and the household will not need homeless services through Coordinated Entry (Step 3) you may exit them when services cease being offered. Examples of Exit at Service End:

- HH is seeking one-time assistance with a deposit and/or security deposit and has already identified and been approved for a housing unit. The Assessor has determined the HH is eligible for **Rapid Resolution** by completing the Rapid Resolution assessment in the Diversion Entry.
- HH self-resolves

3. Destination: Select the most accurate answer.

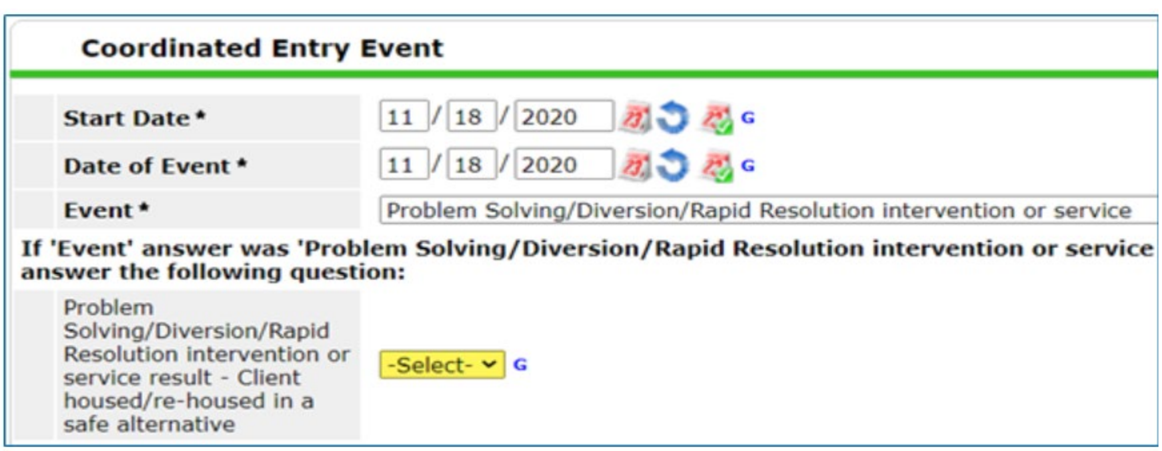


Choose Save & Continue.

6. Edit the Coordinated Entry Event (Sub-Assessment)

This step is required and must be completed in all exits from Diversion.

1. Click on the edit pencil next to the event you created.
2. Answer the Yes/No question in the Problem Solving/Diversion/Rapid Resolution Intervention or service result (highlighted in the example below)



3. Choose save and exit.

If the result of the Diversion assessment is the Household is homeless and in need of housing assistance, proceed to the instructions for Coordinated Entry to put the client on the Priority List.

If the result of the Diversion assessment is Rapid Resolution where you will be offering one-time assistance, keep the Diversion open until the situation is resolved. Add Assessor Notes explaining the Rapid Resolution. If the household is eventually unable to resolve the situation, is still homeless and Rapid Resolution is no longer an option, exit the household from Diversion and enter the HH into Coordinated Entry.

Documents the client needs to sign:

HMIS Release of Info

NW MN CoC Participant Notice and ROI

Other Agency documents, i.e. Agency Release of Info, Tennessen Warning etc.

The Households How-To Guide has detailed instructions on entering, updating, and exiting Household members.
https://static1.squarespace.com/static/5e163f4f3411163c1a7fdc95/t/5e1cb8fc59e9f01e93c231c6/1578940672754/Households-How-To-Guide.pdf.

ENTRY INTO COORDINATED ENTRY INSTRUCTIONS

IMPORTANT: The Diversion <u>Entry and Exit</u> must be complete and entered into HMIS BEFORE the Coordinated Entry.

After you have completed the Diversion Entry and Exit, if the HH is homeless, you will do an entry into CES to put them on the Priority List. NW CoC Priority List includes HUD homeless as well as households who are homeless using the MN definition of homeless. MN definition includes doubled up. **Before you create a Coordinated Entry record, make sure the Diversion record has an end date and there is not another open CES entry for the NW CoC.**

1. EDA to your Coordinated Entry Provider in HMIS

2. If the HH has changed since you did the Diversion entry, go to the Household Tab and make those changes now. Include Date of Birth and Social Security Number for each household member as this data is required for different housing programs. If you are unsure how to add/remove household members, go to hmismn.org, Training, Forms and Instructions, and choose the Households How-To Guide.
   Once a client record is created for all household members, you will be able to include them in CES entry/exit.

3. Go to the Entry/Exit tab

4. Select Add Entry/Exit
   - **a.** Be sure you are in the Head of HH record.
   - **b.** Make sure all HH members are checked to include them in this entry.
   - **c.** Provider: Your Coordinated Entry Assessment Provider
   - **d.** Type: Choose Basic
   - **e.** Project Start Date: The date you talked to the HH

5. Select Save and Continue to proceed to the **Coordinated Entry Assessment**. The Coordinated Entry Assessment is done for the Head of HH

6. Edit the Coordinated Entry Assessment (sub-assessment). Complete the Coordinated Entry Assessment for the Head of Household only.
   - **a.** If the client was entered into Coordinated Entry on the same day as the Diversion and the Prioritization Status is "Placed on Prioritization List (as shown below), you will not need to edit the Coordinated Entry Assessment. Make sure the Prioritization Status is as shown in the example:

Updated CE Assessment Row (Client Placed on Priority List)

Coordinated Entry Assessment

		Date of Assessment *	End Date	Assessor's Name	Assessor's Organization	Assessment Level	Prioritization Status
		02/01/2022		Jane Doe	Street Outreach Agency	Housing Needs Assessment	Placed on Prioritization List

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b. If your Diversion Entry is open for 1 or more days before you determine the client will be homeless without assistance through the Priority List, you will need to add them to the Priority List using 2 rows as shown in the example below:

   i. Add an end date to the CE Assessment you created in Diversion - the one that shows “not placed on the Prioritization List”.

   ii. Click Add to enter a new CE Assessment.

   iii. Fill out the following fields:

   - Date of Assessment (the date you spoke with HH)
   - Assessment Location (where you spoke with HH-your office, library, park, etc.
   - Assessors Name
   - Assessor’s Organization
   - Assessor’s Title
   - Assessor’s Phone
   - Assessor’s e-mail
   - Assessment Type
   - Assessment Level – **Choose Housing Needs Assessment**
   - Prioritization Status – **Choose Placed on Prioritization List**

Diversion CE Assessment Row + Row for Client Placed on Priority List

Coordinated Entry Assessment

		Date of Assessment *	End Date	Assessor's Name	Assessor's Organization	Assessment Level	Prioritization Status
		02/06/2022		Tim Smith	Street Outreach Agency	Housing Needs Assessment	Placed on Prioritization List
		02/01/2022	02/05/2022	Jane Doe	Street Outreach Agency	Housing Needs Assessment	Not Placed on Prioritization List

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Your Coordinated Entry Assessment will now show two Assessments, one that was completed in Diversion with an End Date and one for the Coordinated Entry with no End Date.

Do not make any changes or edits to the Coordinated Entry Event you created in Diversion.

7. Answer the remaining questions in the assessment. It is important to have all questions answered as missing data may affect a HH’s priority and eligibility for certain housing programs. Housing History and Barriers should be as complete as possible to determine LTH and to assess needs.

8. **Current Living Situation Sub-Assessment:** This should be updated through an Interim review when a clients’ living situation changes.

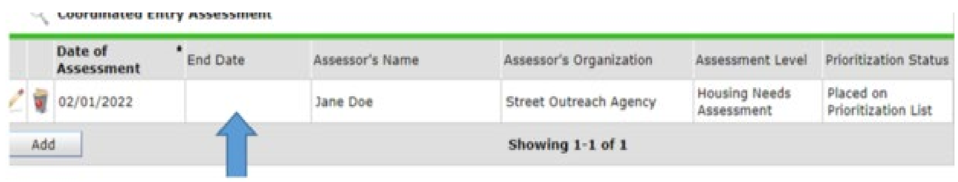
9. Be sure to add Notes in the CES Assessor’s Notes. You can use the note section to give more detail as to a household’s homeless situation.

EXIT FROM COORDINATED ENTRY INSTRUCTIONS

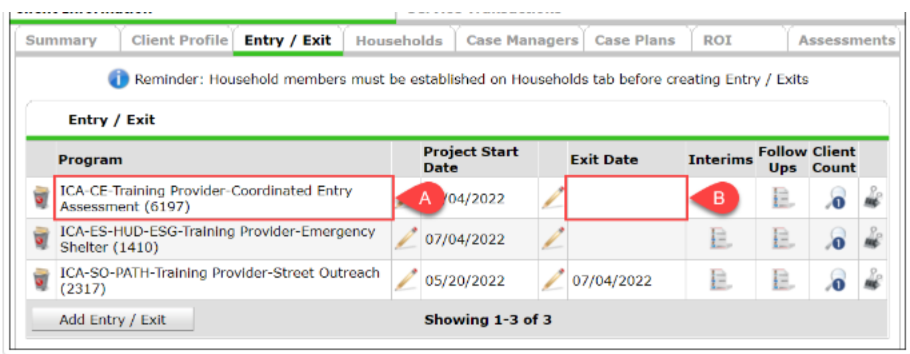
Who should remove the HH from Coordinated Entry? It is not necessarily up to the Assessing Agency to remove a household from the Priority List.

1. **Housing Agency**: If a HH was referred to a CoC housing program (PSH, THP, RR, YHDP etc.), the agency providing the housing voucher should exit the HH from Coordinated Entry when they are housed.
2. **Assessor or Housing Agency**: The person receiving information that the HH has self-resolved, left the area, or is no longer in contact with the assessing agency, should exit them from Coordinated Entry. This could be either an assessor or housing case manager who is working with a HH.
3. **Priority List Manager**: Priority List Manager will remove HH's who receive an Emergency Housing Voucher.

To exit a client from Coordinated Entry:

1. EDA to Coordinated Entry
2. Put an end-date on the Coordinated Entry Assessment that placed the HH on the Priority list:
    a. 

3. Go to the Entry/Exit Tab.



*Screenshot: The name of the Entry/Exit program will include the words "**Coordinated Entry Assessment**" or "**Priority List**" (A) and the **Exit Date** field will be empty (B).*

4. Select the Edit pencil under the Exit Date for the Coordinated Entry Assessment. Make sure to include all household members who are exiting. You only need to provide an answer for:
    a. Exit Date – date HH is leaving CE
    b. Destination: Choose most appropriate response
5. Choose Save and Continue and answer the two questions:
    a. Agency removing the client (your agency)
    b. User removing (your name)

These instructions, as well as intake forms, trainings, and other NW CoC information are located in the Northwest MN Foundation website: **https://www.nwmf.org/resources/strategic-partnerships/nwcoc/**

You can find complete information, videos and report resources for Assessors and Housing Providers at hmismn.org/coordinated-entry.

The Minnesota's HMIS Knowledge Base has information regarding Coordinated Entry, as well as many other HMIS related questions you might have: https://hmismn.helpscoutdocs.com/.

The Households How-To Guide has detailed instructions on entering, updating, and exiting Household members.
https://static1.squarespace.com/static/5e163f4f3411163c1a7fdc95/t/5e1cb8fc59e9f01e93c231c6/1578940672754/Households-How-To-Guide.pdf.