Required Steps for HMIS

For the latest information relevant to each funding stream - including memos from the funders, data entry forms that reflect the required screens, and any further instructions - please see **www.hmismn.org** and click on:

"**Entering data into HMIS: Req.'s, Forms & Instructions"**

<table>
<tr><th>Funder/Program</th><th>Which Steps are Required?</th><th>Which Report(s) are required?</th></tr>
<tr><td>DHS/OEO

Emergency Shelter Grant Program (ESGP)</td><td>Profile
▪ Complete Household Information (if more than 1 person)

Entry-exit step is not required for ESGP

Release of Information (ROI) and Security
▪ Only if sharing data with outside agencies
▪ Click on 'Security' button to indicate who you're sharing data with

*For all assessment data: match back date mode date to program entry date

Universal Assessment
▪ Complete for every person 18+ and unaccompanied youth

ESG (Including OEO-ESGP) Assessment
▪ Complete for every person over 18 and unaccompanied youth.

Service Transactions
Record a service-multiple services now best
▪ Provider = specific program serving the client

To Exit Clients
▪ Service Transactions: enter end dates for services

Case Plans are not required for ESGP</td><td>Report due quarterly and annually, using ART:

<u>From ESGP Folder:</u>

▫ ESGP Counts;

always use July 1 as Start Date; reports are cumulative through the year</td></tr>
</table>

<u>All Programs</u>

- Client Notice and Consent: All adults must read the notice and be given the option to sign the consent form for themselves (and their children). If they don't sign, enter as anonymous.
- Remember to use back-date mode for intake information that isn't entered into the system on the same day the client entered the program.
- Disabilities: HUD does not require disability information for minors; MN programs require disability information for unaccompanied youth, not for children within a household.
- Disabilities should be recorded in respective client's record.
- Monthly Income: If you get funding from HUD or Minnesota's Ending LTH, income needs to be recorded in each respective adult's record. If your organization ONLY receives state funding (other than LTH), you may enter income for all household members in head of household's record. When in doubt, enter income in each respective adult's record.
  - For minors within a household: Enter payments parents receive on a minor child's behalf (such as a disability payment) in the household head's record. Do not enter income from a minor child's job.
  - If client has no income, select "No Financial Resources" for "Source of Income"