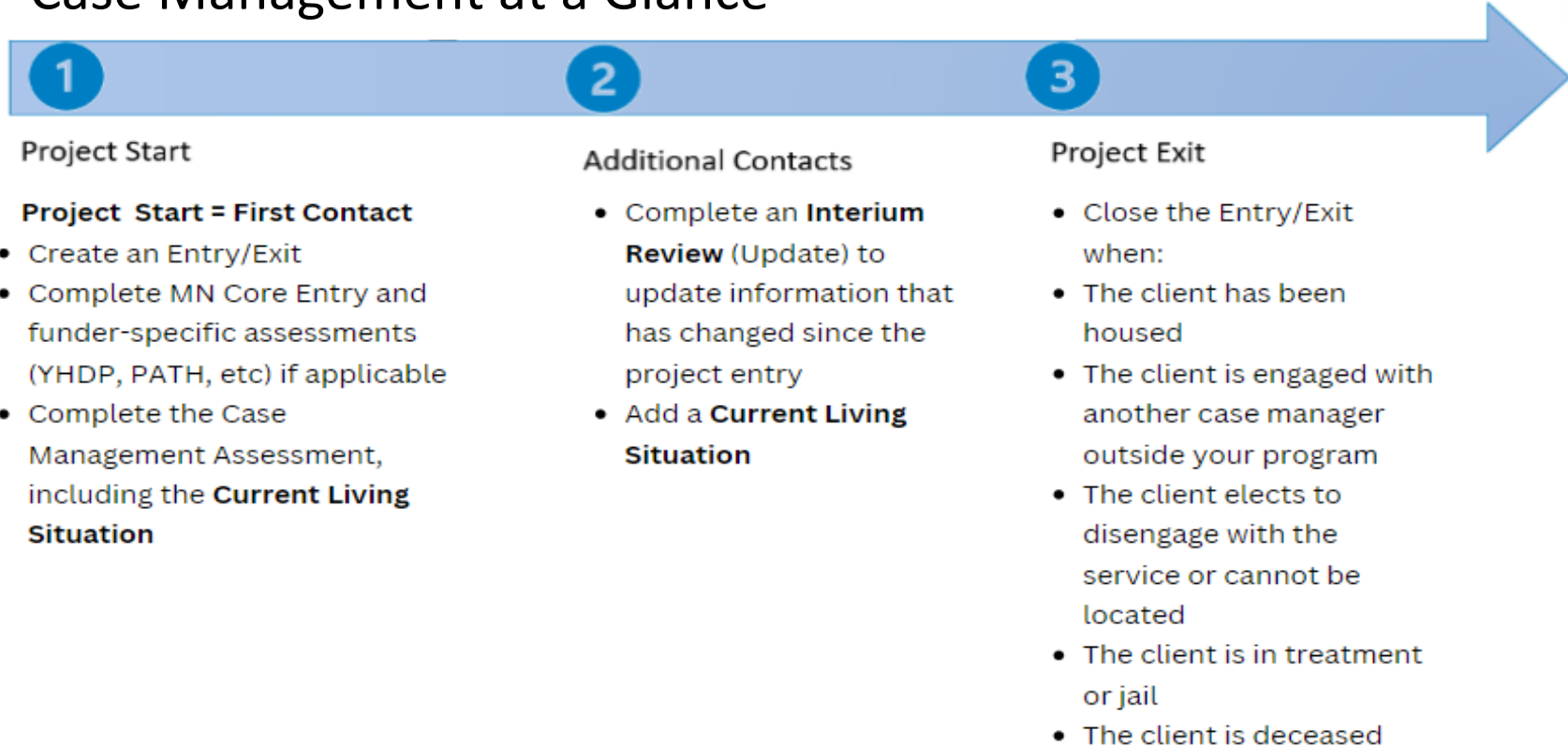


Case Management at a Glance



1: Project Start Date – Date the client first began working with the case management program and generally received the first provision of service. Also referred to as **Program Entry**.

2: Contacts – A contact is defined as an interaction between a case manager and a client designed to engage the client. Contacts include activities such as a conversation between the case manager and the client about the client's goals, a visit to discuss their housing plan, or a referral to another community service. The Hennepin Case Management assessment should be updated anytime a client's housing preferences or situation changes.

3: Project Exit – Represents the end of a client's participation with case management.

Note: If client is enrolled in or becomes enrolled in another Federal- or State-funded project such as ESG, PATH, YHDP, or CES alongside Case Management refer to the "Tips for CM Clients Enrolled in Multiple Projects" document for advise on how to streamline entries, updates, and exits.

1. Project Start Date¹

- a. EDA to Case Management provider (may be a combined Federal- or State-funded/CM provider)
- b. Find existing client record or create new client record
- c. Update missing or incorrect information on the Client Profile tab (see page 3)
- d. Create a new Entry/Exit on the Entry/Exit tab
 - i. Select the Basic entry type
 - ii. Review and update review MN Core and/or any assigned funder-specific assessments. Some of these fields may already have data from previous assessments. Make sure all data is current as of Case Management program enrollment
 - iii. Complete the Hennepin Case Management assessment, updating previous responses as necessary
- e. Add the case manager's name to the Case Managers tab

2. Additional Contacts²

- a. EDA to Case Management provider (may be a combined Federal- or State-funded/CM provider)
- b. On the Entry/Exit tab or Summary tab:
 - i. Locate the open Case Management Entry/Exit and add an interim update
 - ii. Update information that has changed since project start, such as:
 - 1. Current Living Situation, record at each contact
 - 2. Housing Documentation Status, if the client started working on or secured any documents
 - 3. Monthly Household Income, if the client's income changed
 - 4. Legal Involvement, if you got more information about the client's background
 - 5. Client Choice, if the client's housing preferences changed
- c. If all entry information was not collected at project start, add any missing details you've since collected to the entry assessments. (Please Note: This step should take place in the entry assessment, not the interim update)
- d. Missing or incorrect information can also be added to the Client Profile tab (see page 3)

3. Project Exit³: Project exit represents the end of a client's participation with case management.

- a. Confirm that the client should have their Entry/Exit closed. Reasons to exit a client might include:
 - i. The client has been housed
 - ii. The client is engaged with another case manager outside of your program
 - iii. The client is no longer receiving Case Management or cannot be located
 - iv. The client is in treatment or jail
 - v. The client is deceased
- b. EDA to Case Management provider (may be a combined Federal- or State-funded/CM provider)
- c. On the Entry/Exit tab or Summary tab:
 - i. Locate the open Case Management Entry/Exit and click on the edit pencil next to blank Exit Date field
 - ii. Enter a Destination. This is where a client's housing outcome should be documented in HMIS
 - iii. Update information that has changed since the last interim update, such as:
 - 1. Current Living Situation with the client's new location (e.g. PSH, market-rate housing)
 - a. Current Living Situation should match Destination
 - 2. Housing Documentation Status, if the client secured any documents
 - 3. Contact Information, if the client has a new address, phone, or email
 - 4. Monthly Household Income if the client's income changed
 - iv. Optional: update Income, Non-Cash Benefits, and Health Insurance information on the MN CORE.

4. Case Manager Tab

- a. If client is no longer receiving case management services or changes case managers, add an End Date to the Case Manager tab that matches the date the case manager ceased working with the client. Add a new case manager if appropriate.

WHERE TO RECORD INFORMATION AND WHEN

On the Client Profile Tab Required for All Clients at Record Creation		
If missing, complete at program entry. Correct previous answers if needed.		
Name		
Social Security Number		
Veteran Status		
Date of Birth		
Gender		
Race		
Ethnicity		
If Native American, of which tribe are you an enrolled member?		
On the Case Management Assessment	Project Entry	Interim Update/Project Exit (if changed since entry)
Current Living Situation	Record at entry and each contact	
Current Case Managers (case managers are also recorded on the Case Managers tab)	X	X
Housing Documentation Status	X	X
Contact Information	X	X
Monthly Household Income	X	X
CES Household Disability Information	X	X
Legal Involvement	X	X
Client Housing Choice and Preferences	X	X
Current Housing Type Being Pursued	X	X
On the MN Core Assessment	Project Entry	Interim Update/Project Exit (if changed since entry)
Required at program entry. Review and update previous answers if changed since last assessment.		
Relationship to Head of Household	X	
Disabling Condition	X	
Veteran and Domestic Violence series	X	
Extent of Homelessness (MN)**	X	
Length of Stay in Previous Place/Prior Living Situation**	X	
Last Permanent Residence	X	
Client Location**	X	X
County where resides	X	X
Optional (Tracking this information is helpful for outcomes reporting)		
Income and Sources	X	X
Non-Cash Benefits	X	X
Health Insurance	X	X
Disabilities	X	X

** These fields are most likely to need updating at Case Management program entry.