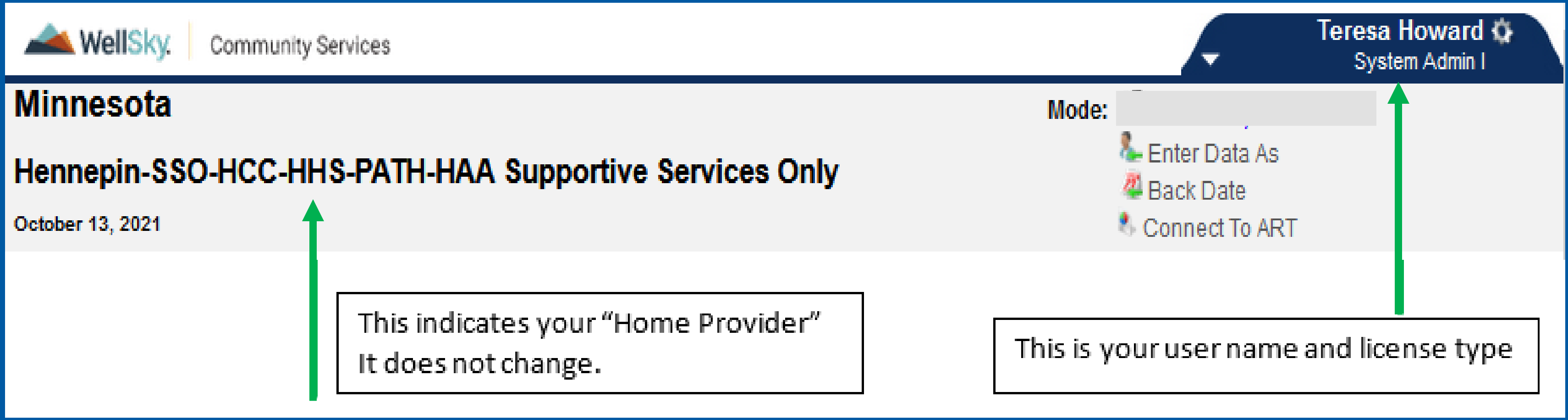
HENNEPIN COUNTY

MINNESOTA

Hennepin County Homeless to Housing HMIS Case Manager Training

Health and Human Services: Teresa Howard October 13, 2021

Logging in – Home Screen



- Users "Home Provider" could be one of the following, depending on your role
  - Hennepin-HCC-Hsg and Homeless Initiatives (no data entry) (734)
  - Hennepin-SSO-HCC-<>-Homeless to Housing-Homeless Access Team (5275)
  - Hennepin-SSO-HCC-HHS-PATH-HAA Supportive Services Only (4184)
  - Hennepin-SSO-HCC-HHS-PATH-Homeless Adult Access Street Outreach (3344)
  - Hennepin Shelter Team-CE-HCC (3794)

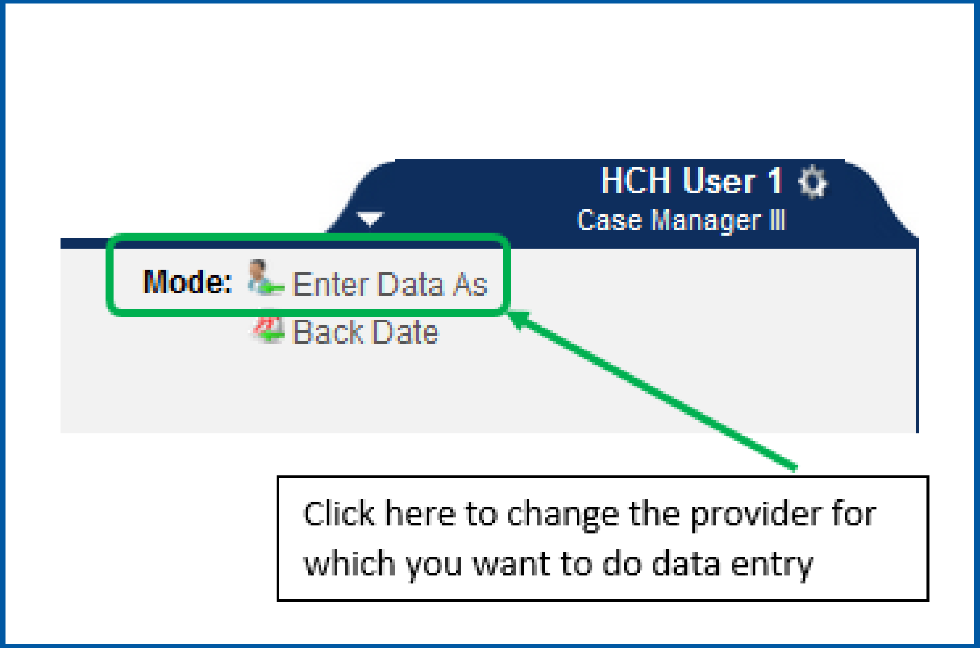
Homeless to Housing HMIS Case Manager Training

- Agenda
  - Logging in and selecting the right provider
    - CES, Homeless to Housing, or PATH
  - Homeless to Housing HMIS Set-up
  - Shared Clients and Data Privacy Review
  - HMIS Workflow
  - Live Demo
  - Reporting
  - Questions

Selecting the Right Provider

Changing roles in HMIS requires changing providers

- This is done by using EDA mode
- EDA mode allows you to do data entry into a provider different than your "Home Provider"
- Security and visibility settings are tied to a certain provider so be sure you're selecting the right one every time
- Select H2H, CES, HST, shelter or other funder as appropriate



Shared Clients and Data Privacy

- Clients who have gone through Hennepin Shelter Hotline, been to the ASC or Family Shelter Team, or been in a shelter will likely have signed the HMIS Release of Information (ROI) and have agreed to share their client record.
  - These are the clients you will see when you search for a record in HMIS
- If you are encountering a patient who is not in HMIS
  - Create a new client record and **ask client to sign ROI** to share statewide
    - Can get verbal consent if not meeting the client in person for the first time then sign at your first in person meeting
    - If the client does not wish to sign the ROI you can add them to HMIS, however you must close the client record from sharing.
      - This also means that client information will not be shared with other agencies including the ASC or shelters. It will only be visible to other Hennepin County projects.
      - Clients who do not sign an HMIS ROI also cannot be referred in CES via HMIS.

Workflow Summaries

Program Start Workflow Summary - HMIS

1. Search for client in HMIS
   - If client is new to HMIS, connect with Hennepin Shelter Hotline
2. Complete CES program entry and assessment (if needed)
   1. EDA to 4314 (singles) or 4315 (family)
3. Complete Case Manager program entry (may be combined Federally-funded/CM provider)
   1. EDA to CM provider
   2. Complete Case Management assessment
   3. Review and update MN Core Entry Assessment for your project type
   4. Update other assessments for other funding sources (if applicable)
4. Complete Case Manager Tab
5. Create Case Plan

Program Update Workflow Summary - HMIS

1. EDA to CM team provider
2. Search for client
3. Search for program entry
4. Create Interim Update
    1. Update CM Assessment
    2. Update MN Core: Update for all non-PH (if something has changed since entry)
    3. Update other Interim assessments for other funding sources (if applicable)
5. Update Case Plan
    1. Add follow-ups
    2. Update goals or action items
    3. Add new goals or action items
6. Update Case Managers Tab

Note: Do not update Current Living Situation from the CM or CES provider unless the client is NOT enrolled in a Federally-funded program

Program Exit Workflow Summary - HMIS

1. EDA to CM team provider
2. Search for client
3. Search for program entry
4. Record exit date and destination
5. Review and update MN Core Exit Assessment for your project type
    1. Update Contact Info and other exit assessments for other funding sources (if applicable)
6. Update Case Plan
    1. Record final outcomes
7. Update Case Managers Tab
    1. End any case managers no longer active with the client

Program Entry

Program Start Workflow - HMIS

1. Search for client in HMIS
   - Add client to HMIS (with ROI) if not found
2. Complete CES program entry and assessment (if needed)
   1. EDA to CES provider (4314 or 4315)
   2. Follow instructions for CES program entry and assessment
3. Switch EDA to Case Management provider

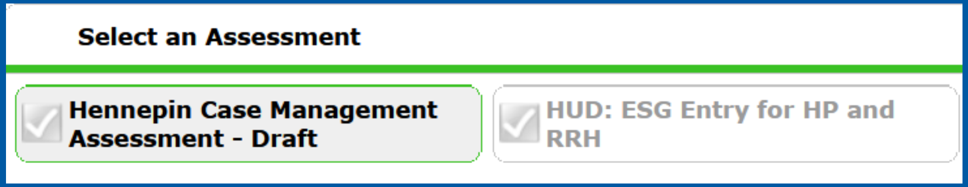
Next…

Program Start Workflow - HMIS

Complete Case Manager program entry

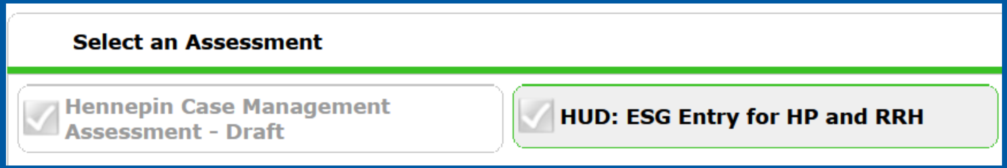
1. Create program entry to CM provider
    1. Entry/Exit Tab
    2. Create Entry/Exit
        - Type: Basic

3. Complete Case Management Assessment



- If client has already had a CES assessment, some fields will already be complete. Confirm or update fields as needed.
- Save (not Save and Exit)

4. Complete or review and update MN Core Assessment and/or any other Federal or State assessment if assigned



- If client has been to ASC or shelter most fields will already be complete. Confirm or update fields as needed.
- Save and Exit

Case Management and CES

- Most questions on the CM assessment are also on the CES assessment.
- You can choose to do either assessment first. If you know they will need a CES assessment, it may be easier to do the CES assessment first.
- Make sure you're in the right EDA to create the CES entry, otherwise the client will not be placed on the CES Priority List.
- See "Tips for Clients Enrolled in Multiple Projects" handout for more details.

Case Manager Assessment

- Purpose:
  - Collect information that will be regularly updated with clients during case management to help speed their entry to permanent housing
- Information collected:
  - Current Living Situation: complete each time you meet with a client
  - *Vital documents: update as needed. Upload documents when possible.
  - *Contact Information: update as needed
  - *Housing preferences/CES Updates: update as needed

*fields are collected on CES assessment and may not need to be completed at entry

MN Core Assessment

- Purpose:
  - The Minnesota Core Assessment collects basic information that will be used to report on who is served in the program. Used when client is not enrolled in any other Federal or State homeless program in HMIS.
- How to complete
  - If your client is new to HMIS you will need to complete this entire assessment
  - Clients who go through the ASC or stay in shelter likely will have already had this assessment collected.
  - If client is already in HMIS, simply review and update as needed at program entry
    - Look for responses that are blank or have colored indicator that is not green (means a response is older and may need to be updated

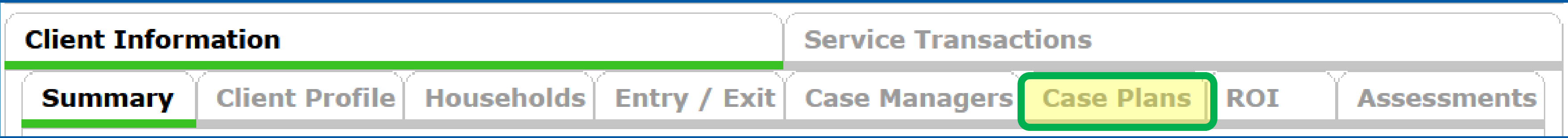
- Information collected:
  - Demographic information
  - Health insurance, Disability, Income and Non-cash benefits information
  - Homeless status and Prior Living Situation series
  - Current Living Situation and Client location
  - Move-in date: Do not edit this information.

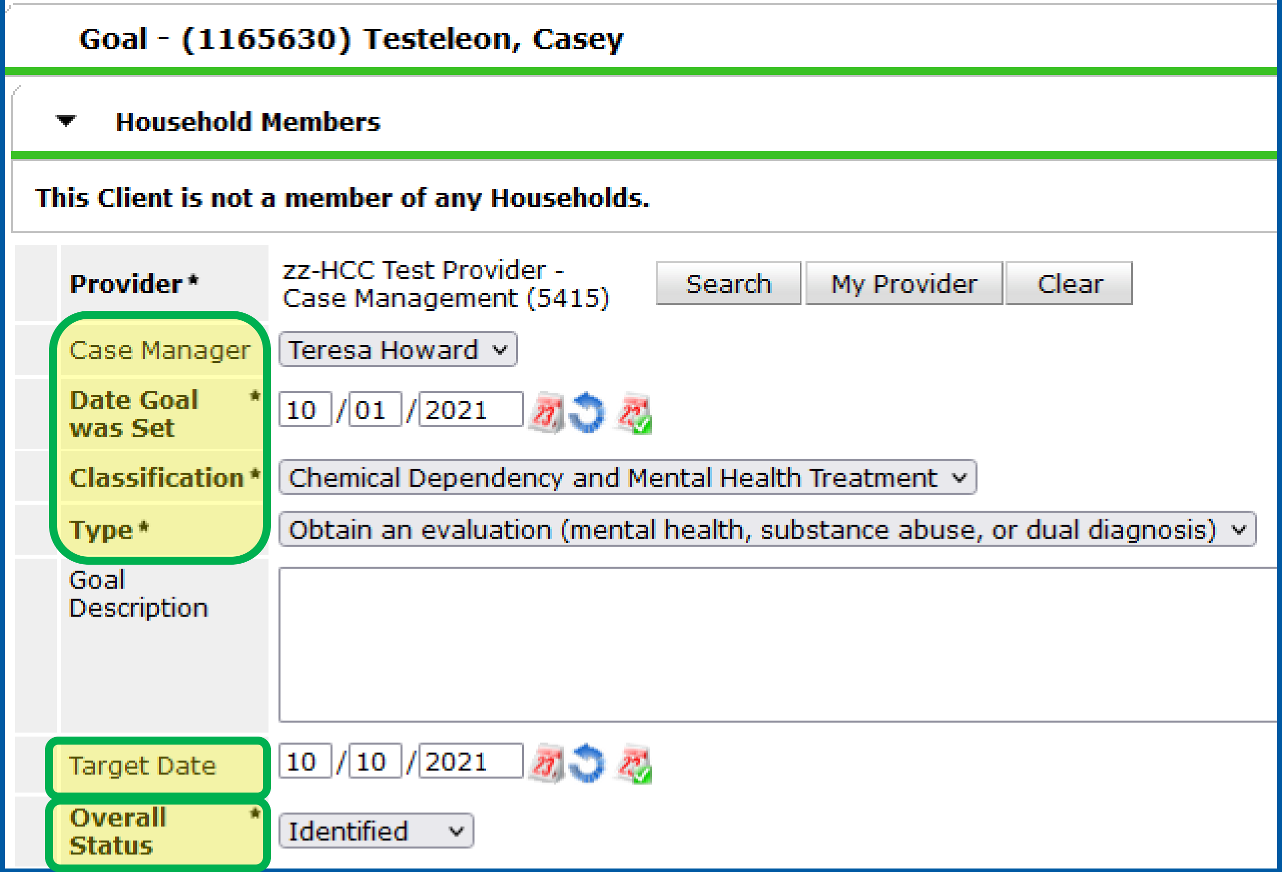
(Most fields are also collected on CES assessment and may not need to be completed at entry)

Program Start Workflow – HMIS Case Plan

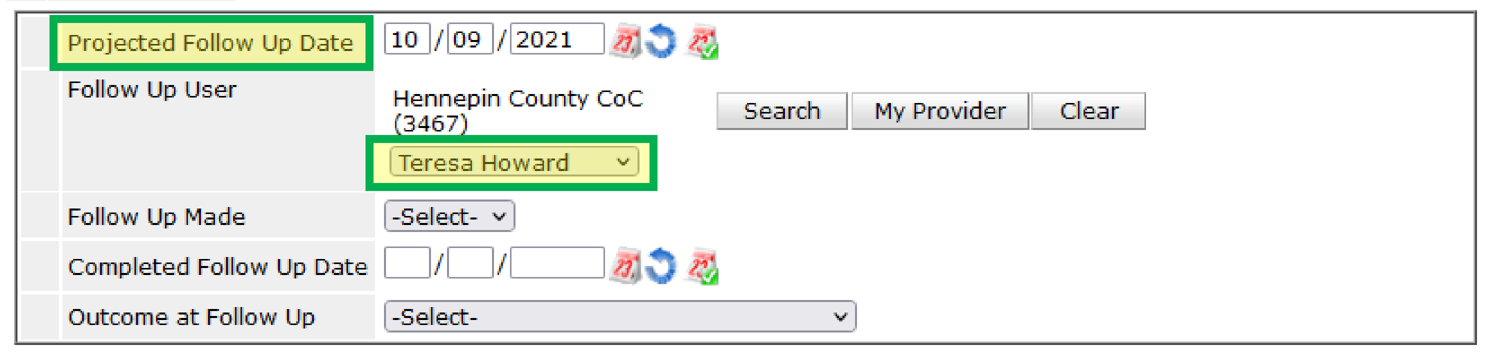
Case Plan Tab

1. Add Goal
   - Case Manager
   - Date
   - Classification
   - Type
   - Description (optional)
   - Target Date
   - Overall Status
     - Identified or In Progress





HMIS Case Plan – Follow up



- Setting a follow up date is optional.
- Will cue a reminder on your home page to follow up with the client
  - For whichever user is indicated
- Update when follow up is complete

HMIS Case Plan – Additional Info

Case Notes

		Provider	Case Manager	User Creating	Note Date	Note
		zz-HCC Test Provider - Case Management	Teresa Howard	Teresa Howard	10/10/2021	Client needs to be evaluated in order to be eligible for additional benefits. Evaluation needs to be complete by 10/15

Add Case Note — Showing 1-1 of 1

Action Steps Planned

		Action Step	Target Date	Status	Outcome	
		Contact evaluation agency to schedule	10/13/2021	In Progress		

Add Action Step — Showing 1-1 of 1

- Add Case Notes
  - Shared with other CM teams, HC operated shelter staff, and PATH workers. Not statewide.
  - See notes in the summary
    - Click to open edit, read, or add another note for each goal

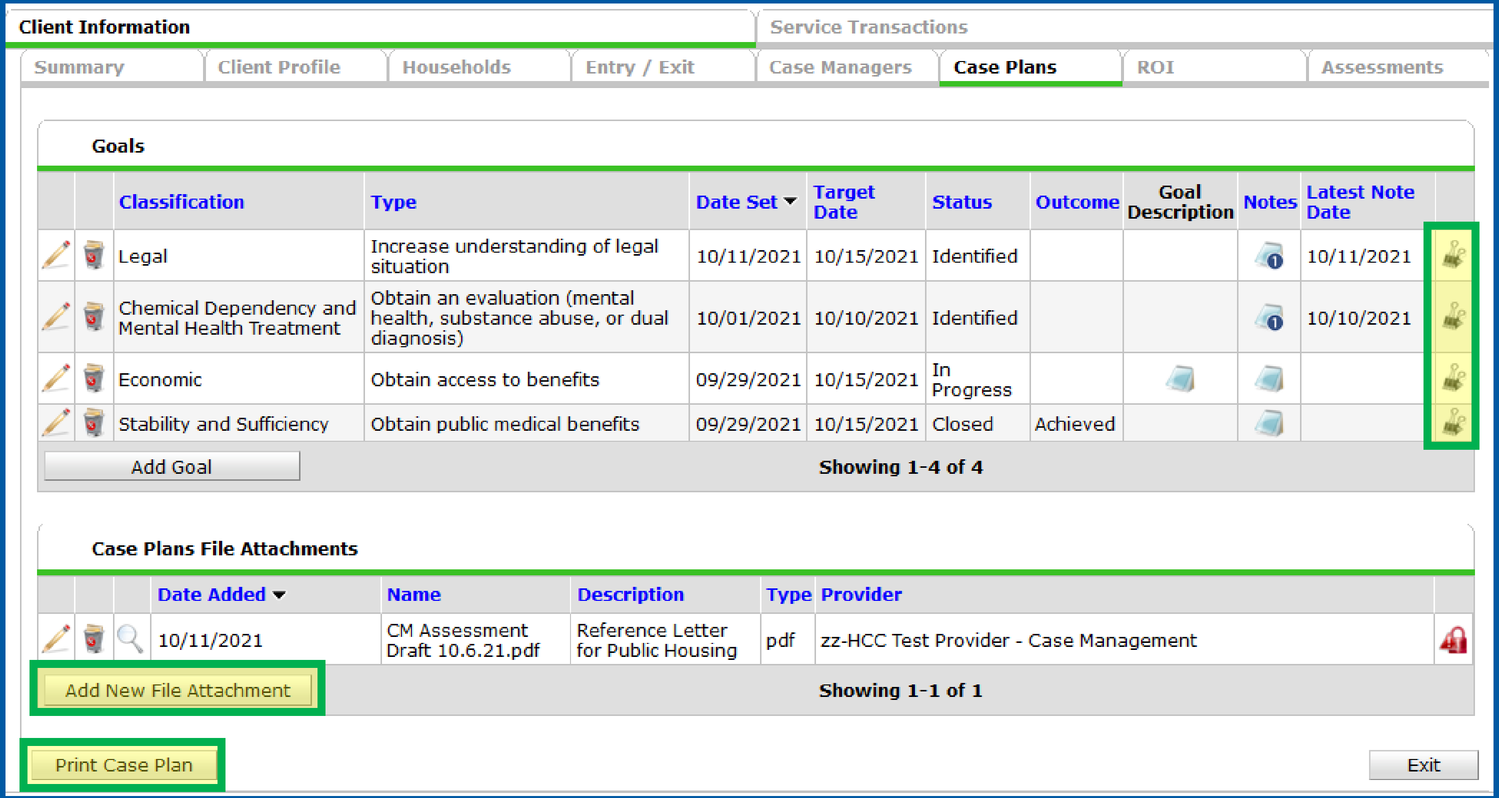
- Add individual Action Steps for goals
  - Includes separate follow up reminders for each step
  - Can also include an attachment

		Classification	Type	Date Set	Target Date	Status	Outcome	Goal Description	Notes	Latest Note Date	
		Legal	Increase understanding of legal situation	10/11/2021	10/15/2021	Identified				10/11/2021	
		Chemical Dependency and Mental Health Treatment	Obtain an evaluation (mental health, substance abuse, or dual diagnosis)	10/01/2021	10/10/2021	Identified				10/10/2021	
		Economic	Obtain access to benefits	09/29/2021	10/15/2021	In Progress					
		Stability and Sufficiency	Obtain public medical benefits	09/29/2021	10/15/2021	Closed	Achieved				

Add Goal — Showing 1-4 of 4

HMIS Case Plan – Additional Info

- Add Case Plan File Attachments
  - Shared statewide, do not include PHI
  - Can be attached by clicking on the “paperclip” icon or by clicking “Add New File Attachment”



Classification	Type	Date Set	Target Date	Status	Outcome	Goal Description	Notes	Latest Note Date
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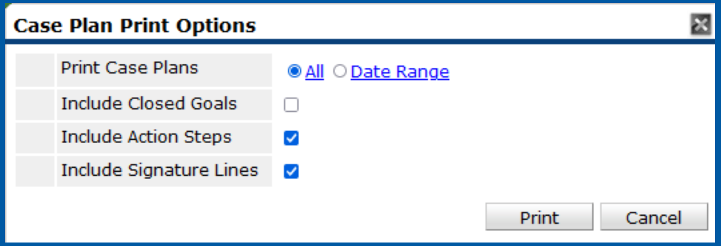
Stability and Sufficiency	Obtain public medical benefits	09/29/2021	10/15/2021	Closed	Achieved			

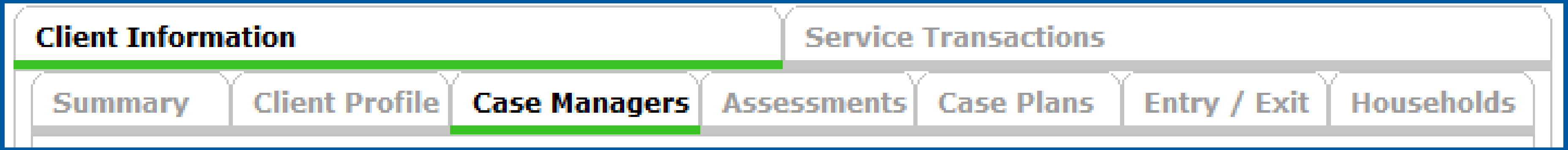
Date Added	Name	Description	Type	Provider
10/11/2021	CM Assessment Draft 10.6.21.pdf	Reference Letter for Public Housing	pdf	zz-HCC Test Provider - Case Management

- Print Case Plan

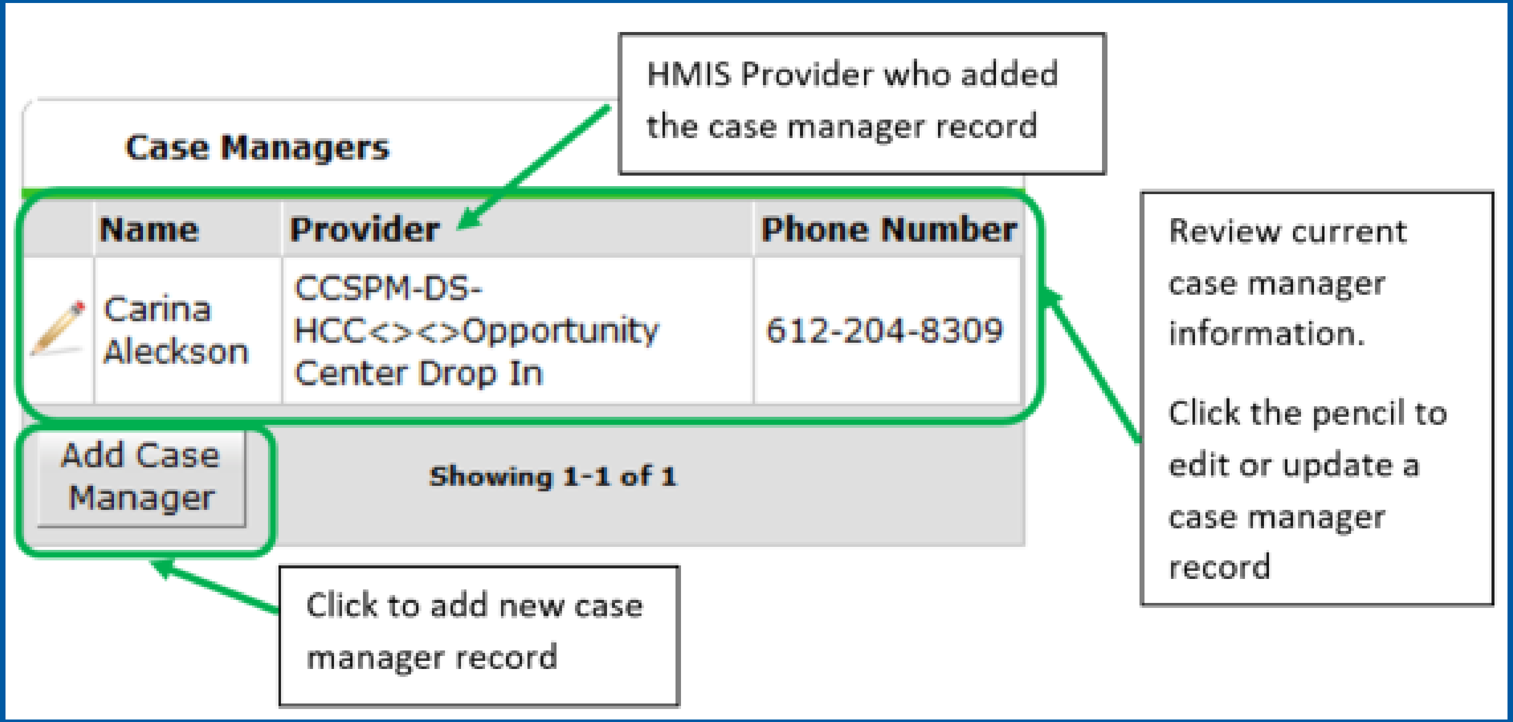


  - Includes a variety of options for printing all or part of the case plan
  - Can print to paper or PDF

Case Managers Tab

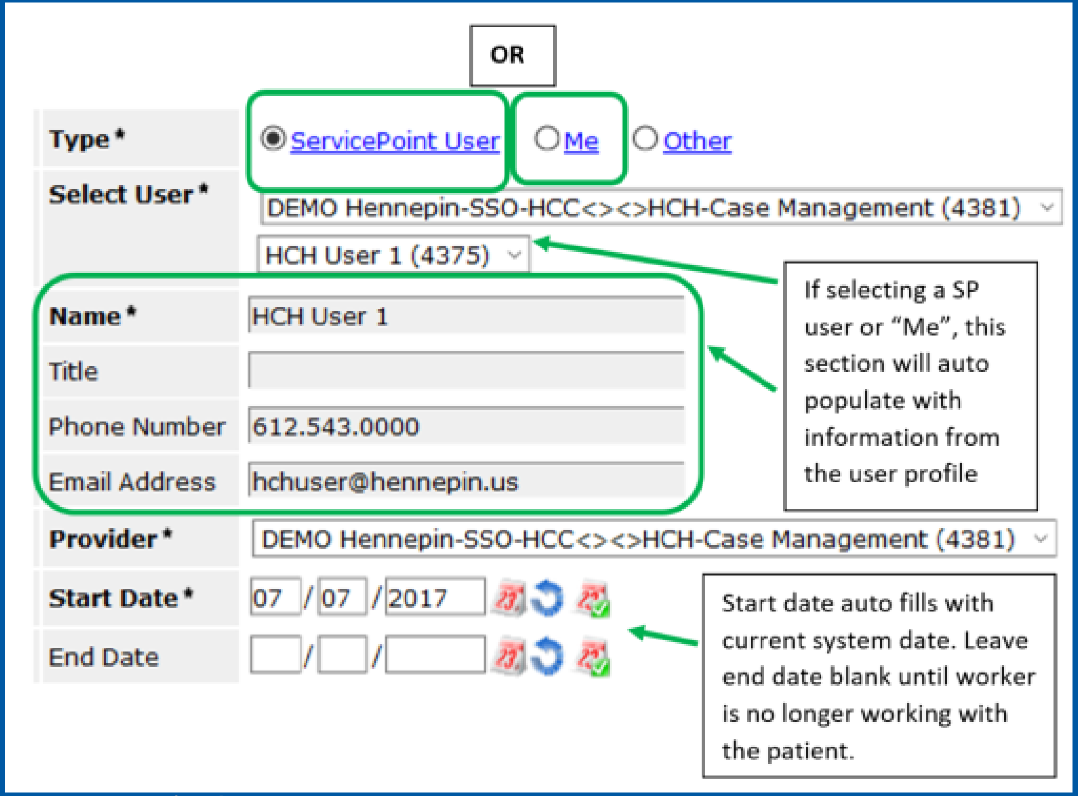


- Shared statewide
- Important communication tool
- Record contact info for
  - Yourself or Other workers you know are involved with the client
- Case Managers do not need to be HMIS user
- Include workers such as
  - ARMHS
  - CADI
- Record an end date when the client is no longer working with the identified case manager

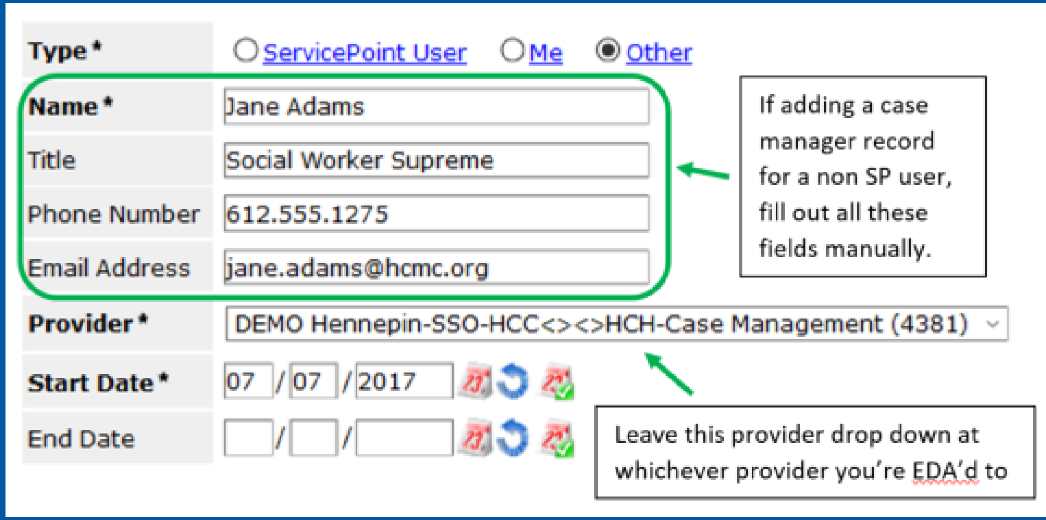


Adding a Case Manager Record

“Servicepoint User” or “Me”



“Other” Case Manager



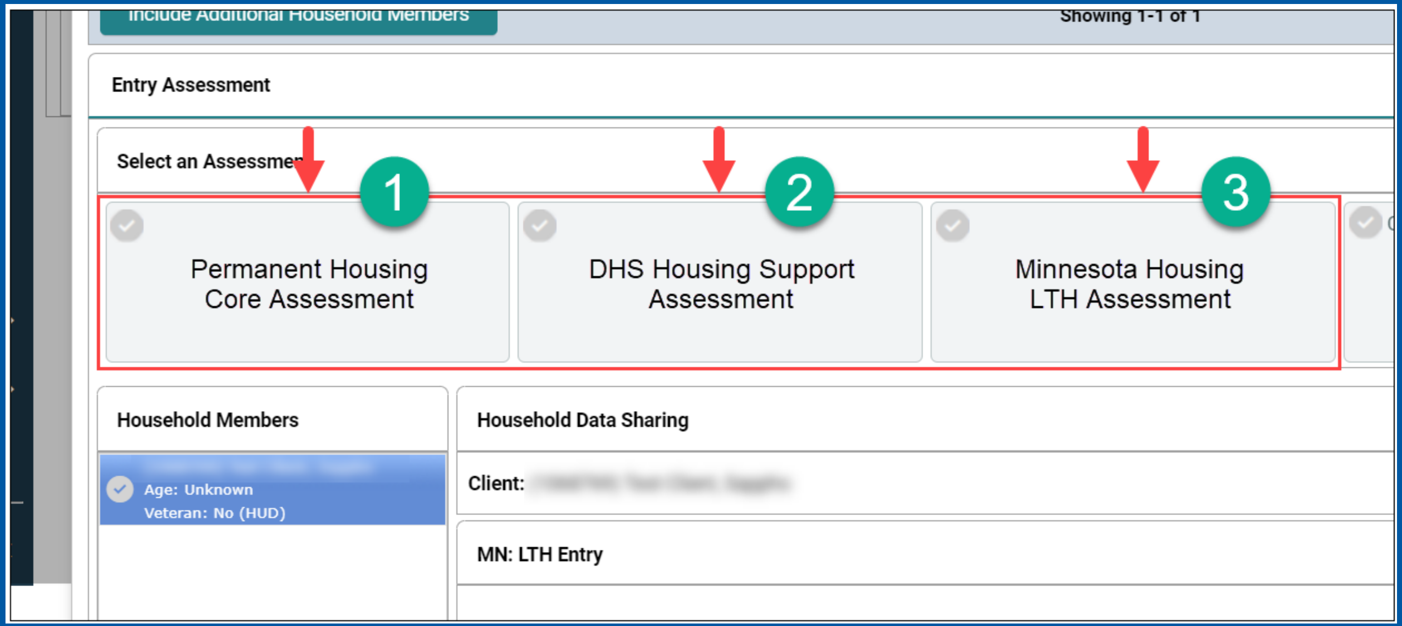
Quick Links and Navigation Tips

Multiple Assessments in one provider

- **Using multiple assessments in one provider**:

- The primary assessment users will see upon creating an Entry/Interim/Exit will be a "core" one assigned based on the Project Type of that provider. For example, all Permanent Housing providers will see "Permanent Housing Core Assessment" upon creating a new Entry.

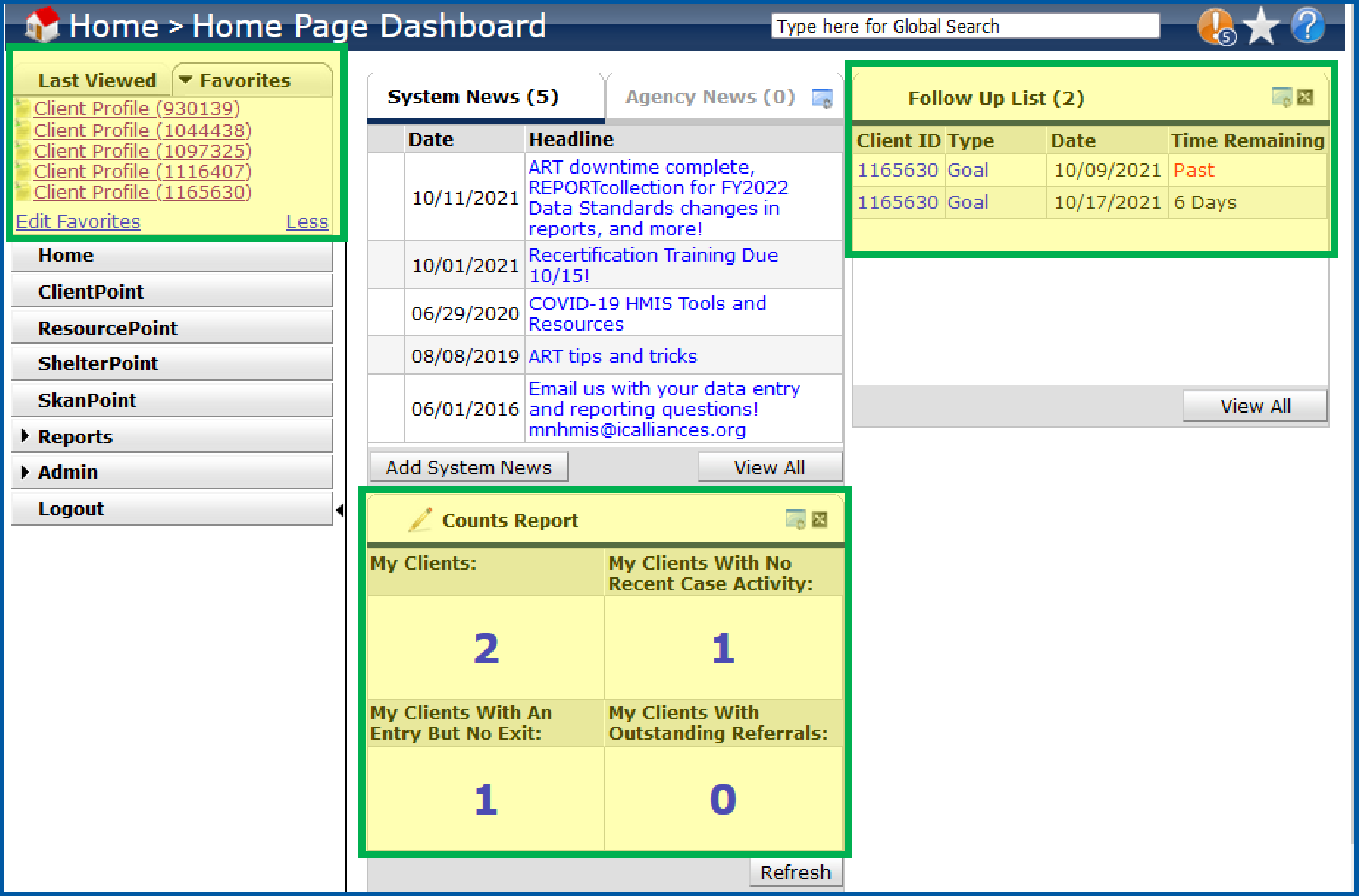
- Then, there will be *separate* tabs that contain the Entry questions specific to the funding sources associated with that program. If a provider has no HMIS-required funding sources, then there will be no additional assessments, just the primary Common one, to complete



ICA's Full Instructions: Using multiple assessments in one provider

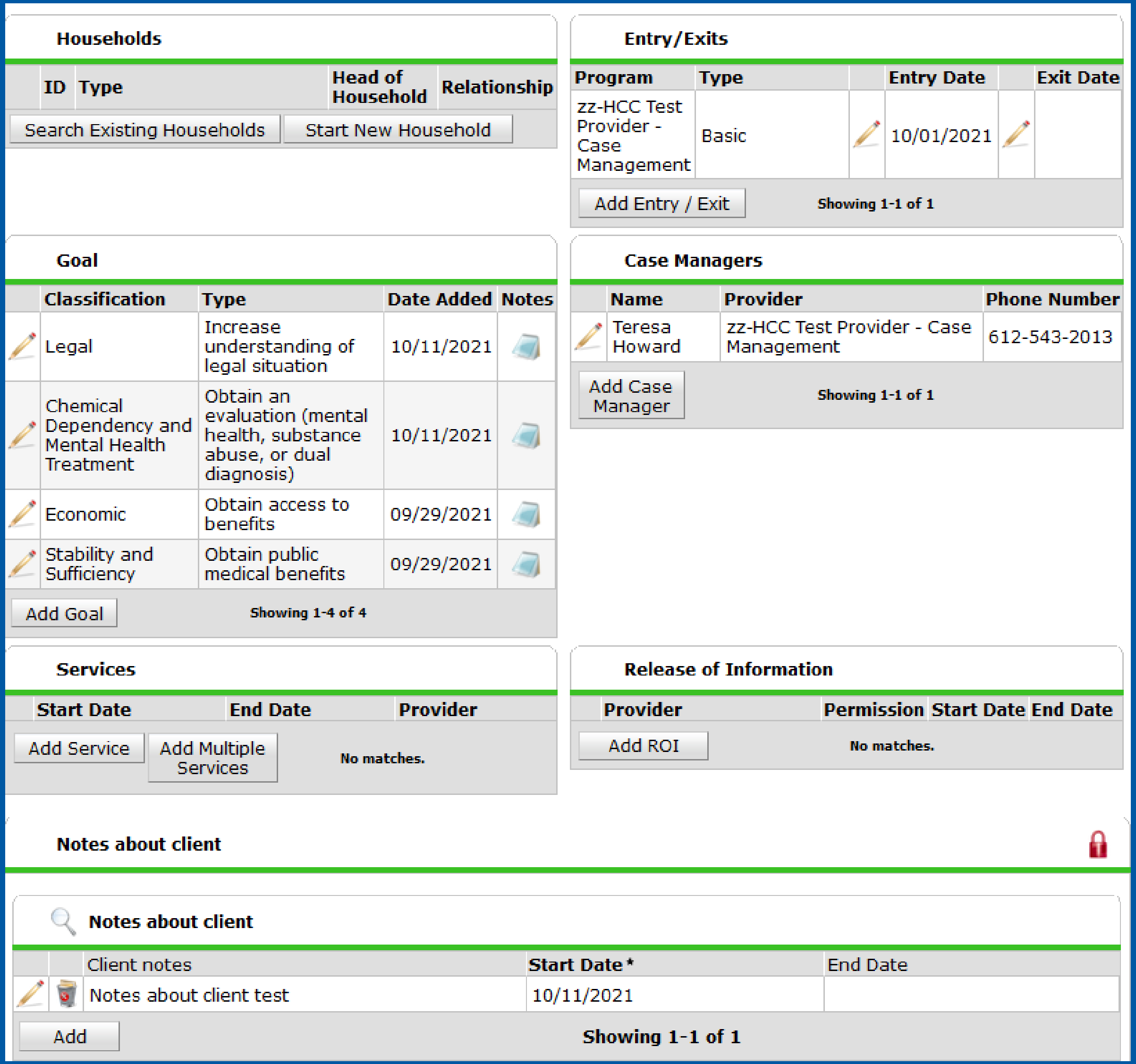
H2H Providers Home Page - Quick Links

- Summary Page – easily navigate to:
  - Favorites
    - "Star" frequently visited client records
    - Hover to see client name
    - Click client ID to open that client record
  - Follow-up List
    - See past due or upcoming follow-ups that were set for client goals
    - Hover to see client name and goal
    - Click the client ID to go to that goal
  - Counts Reports
    - Customizable up to 4 reports
    - Click number link to open a list of clients
      - Click client ID to open client record



H2H Providers Client Summary Navigation

- Summary Page – easily navigate to:
  - Program Entries/Services
    - See where a client is/has been receiving services
  - Goals
    - See Case Plan goals or add new goals
  - Notes about client
    - View or add notes for case management
    - Shared only with H2H, PATH, Hotel shelters



Program Update - Contacts

Program Update Workflow - HMIS

1. EDA to and complete required updates for any Federal or State-funded project first.

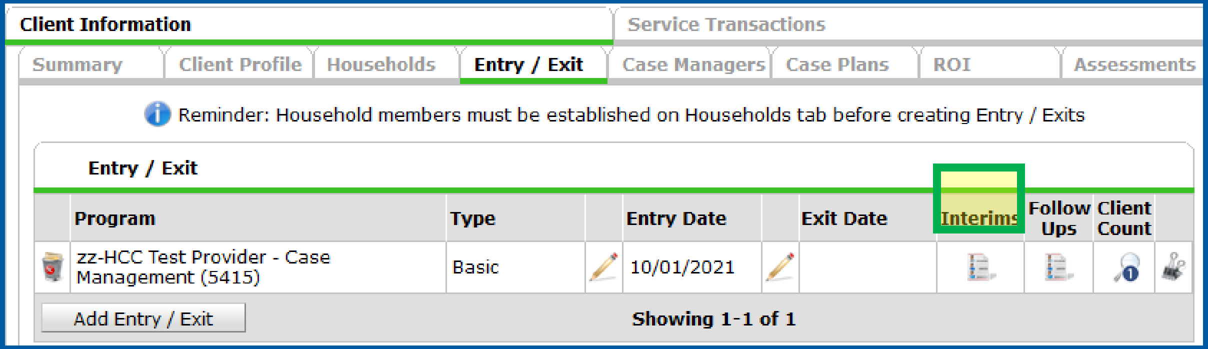
2. EDA to CM team provider

3. Search for client

4. Search for program entry

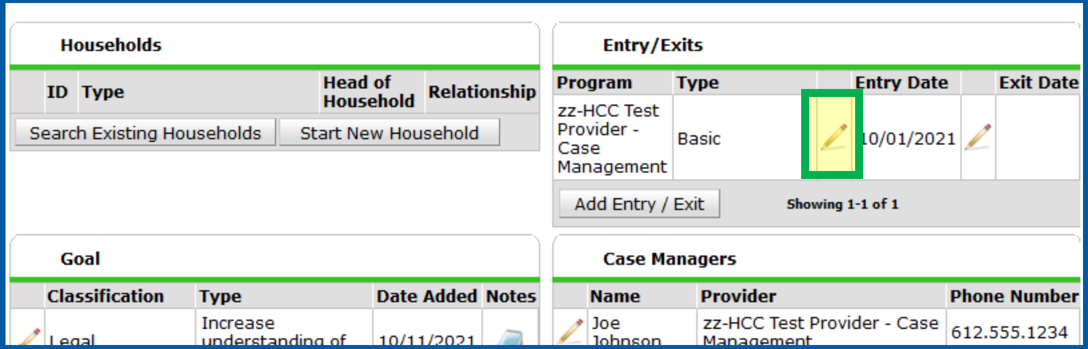
Option 1 - On the Entry Exit Page

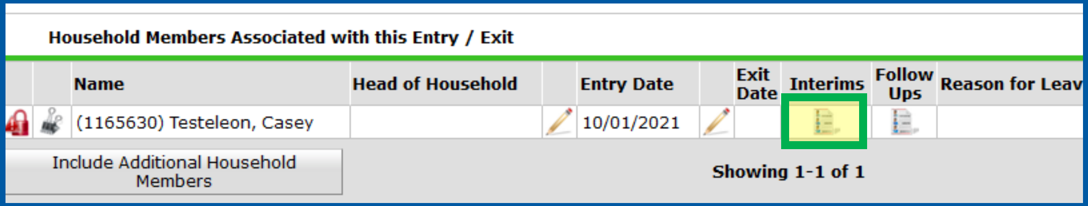
- Click the Interim button



Option 2 - On Summary Page

- Click the edit entry pencil to open the entry, save and continue, then click the interim button

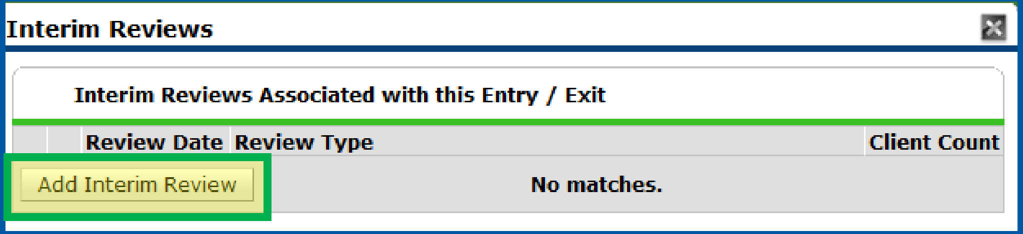




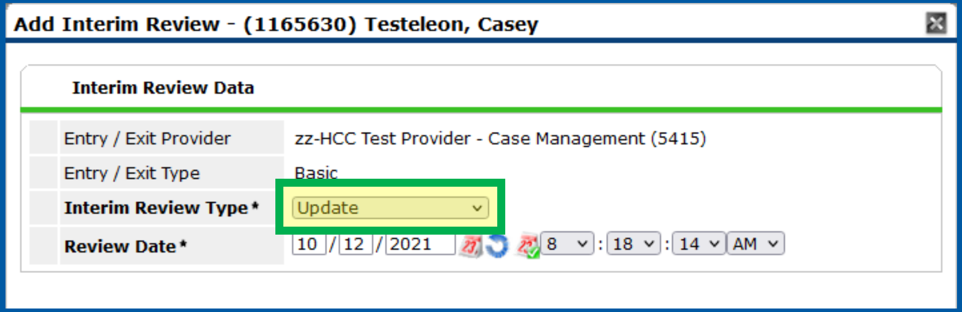
Program Update Workflow - HMIS

4. Create Interim

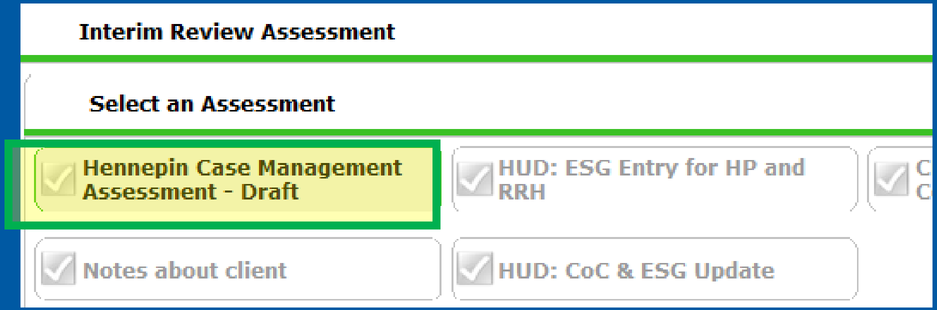
   1. Add interim review



   2. Review Type = Update



3. Update Case Management Assessment and other required assessments



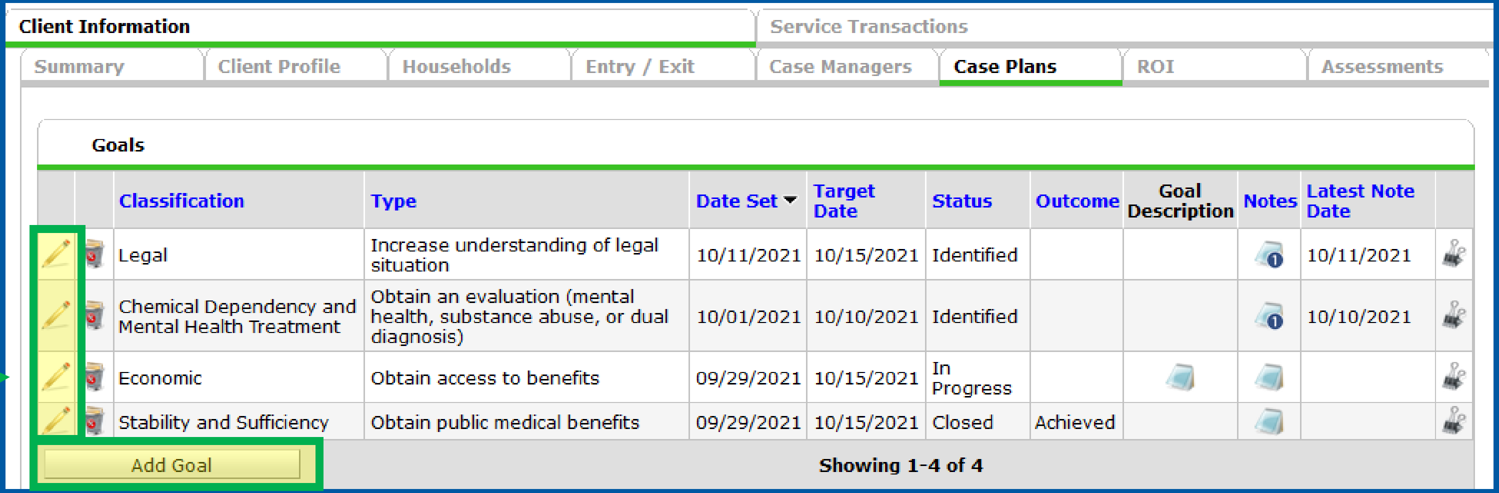
4. Record Current Living Situation

5. Update any fields where information has changed since last contact

6. Save and Exit

Program Update Workflow - HMIS

5. Update Case Plan
   - Click edit pencil next to the goal to record to
     - Update goals or action items or add notes
     - Complete follow-ups
     - Close completed or abandoned goals
   - Click “Add Goal” to add new goals or action items



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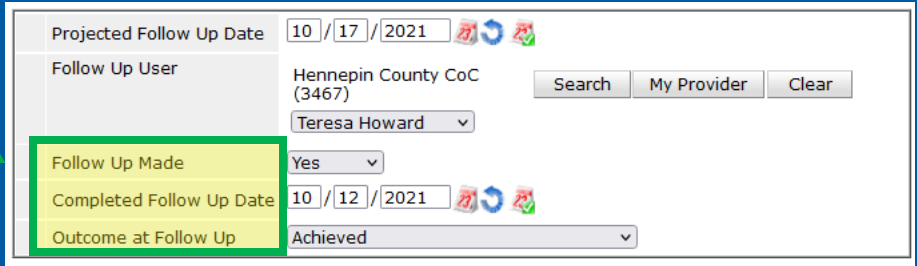


6. Update Case Manager Tab

Hennepin County

Hennepin

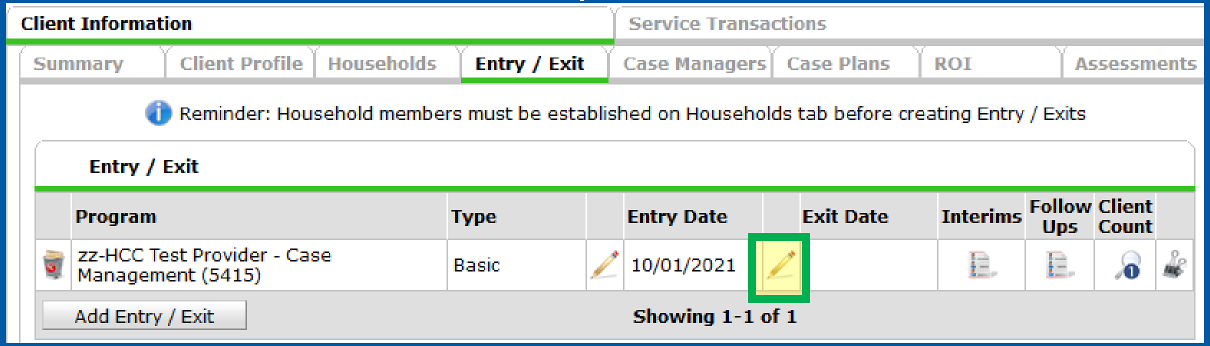
Program Exit

Program Exit Workflow - HMIS

1. EDA to CM team provider
2. Search for client
3. Search for program entry

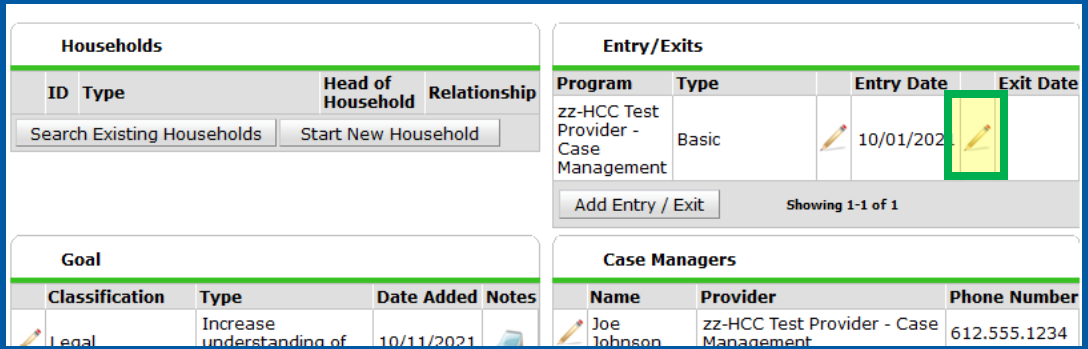
Option 1 - On the Entry Exit Page

- Click the Exit Date edit pencil to create the exit



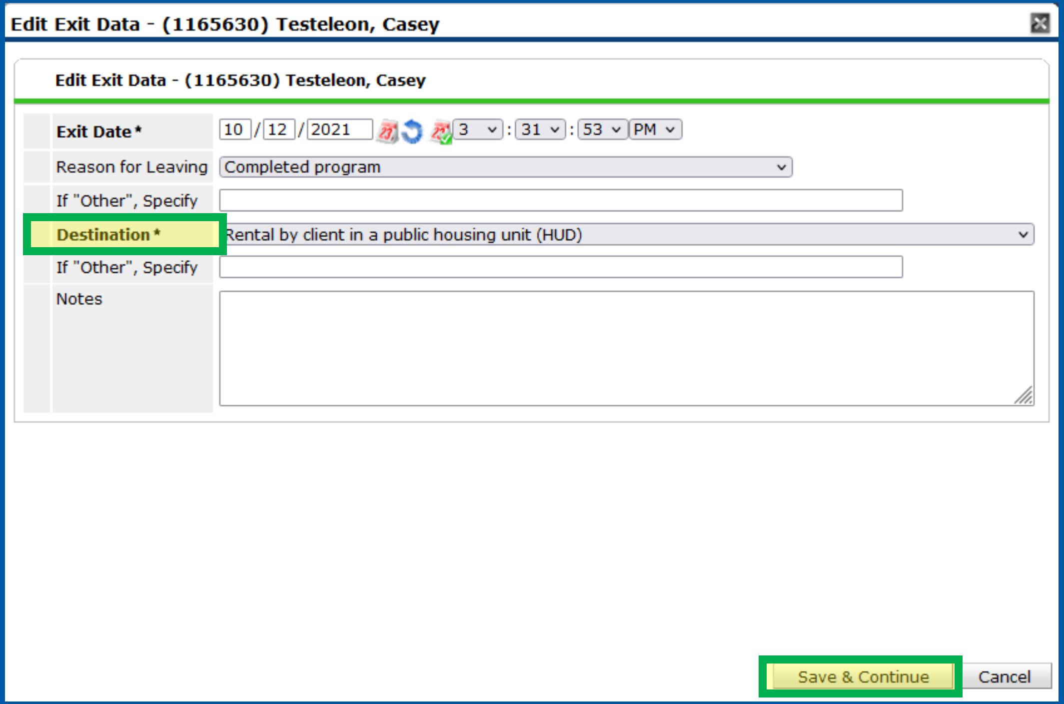
Option 2 - On Summary Page

- Click the edit date exit pencil to create the exit

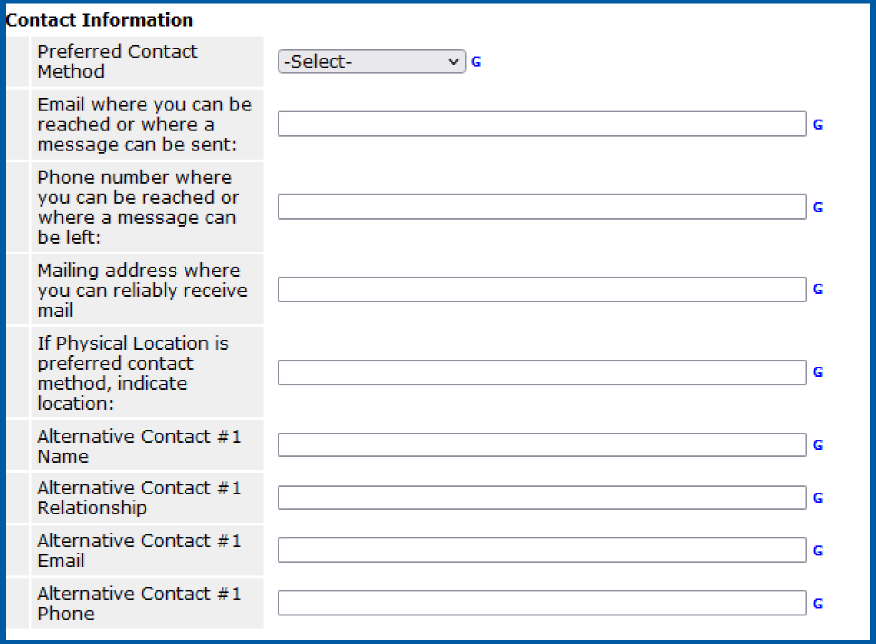


Program Exit Workflow - HMIS

4. Create Exit
    1. Record Destination
        - Reason for leaving is optional
    2. Save and Continue to assessment



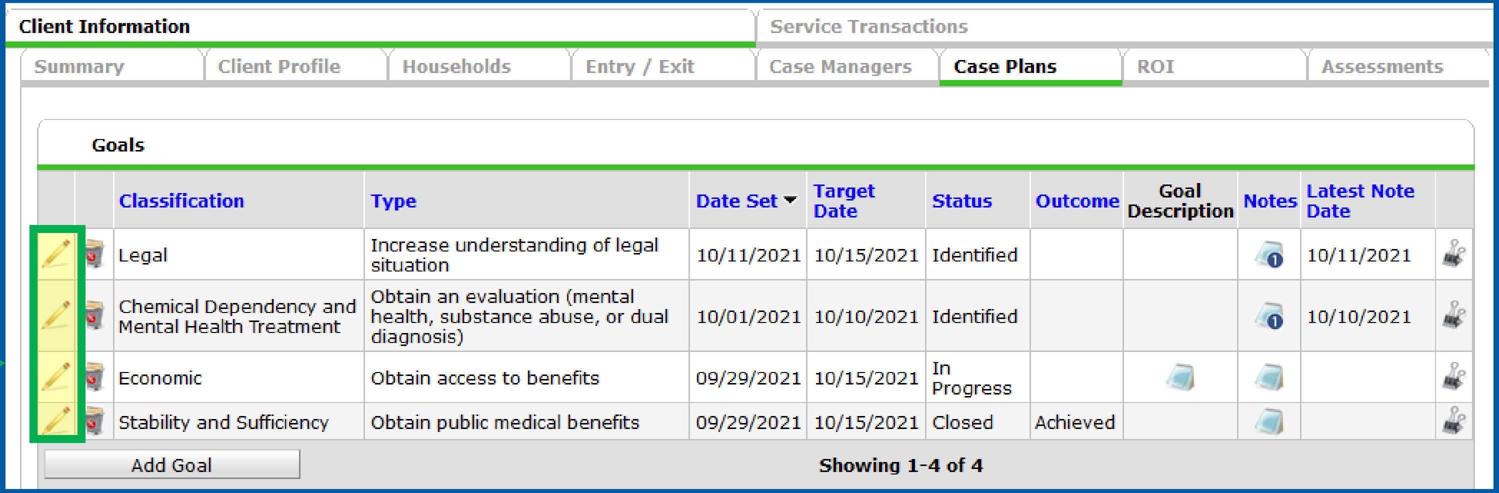
5. Update Contact info
    1. On Case Management Assessment



6. Update Core Exit assessment and any other assigned assessments as needed

Program Exit Workflow - HMIS

5. Update Case Plan
   - Click edit pencil next to the goal to record to
     - Update goals or action items or add notes
     - Complete follow-ups
     - Close completed or abandoned goals



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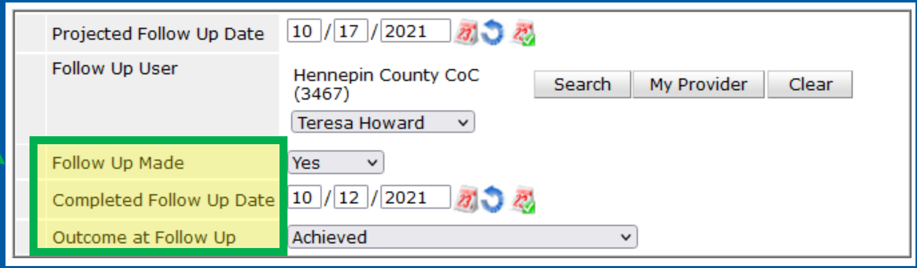
Add Goal — Showing 1-4 of 4



6. Update Case Managers Tab
   - Add end date for your line or any other CMs who are no longer working with client
   - Add new CMs associated with client

Live Demonstration

https://minnesota.servicept.com

Reporting

- Home Page Dashboard reports
  - My Clients
    - All clients where I am Case Manager
  - My Clients With an Exit But no Entry
    - My current clients
  - My Clients With Null UDEs
    - Clients missing universal Data Element (on ESG Assessment
- ART Reports
  - By name lists
  - Core Report
    - Who is being served
    - Outcomes
  - Client Coordinated Entry Status
    - Who is on or off CES Priority list
    - Referral status
  - Notes about client

Questions

- For any questions about using HMIS, contact
- Institute for Community Alliances
  - General HMIS questions
  - www.hmismn.org
  - mnhmis@icalliances.org
- CES Inbox
  - CES Assessment or Process Questions (other than HMIS specific)
  - CES.Hennepin@hennepin.us
- Teresa Howard, Hennepin County Local HMIS System Administrator
  - H2H workflow specific questions
  - Teresa.howard@Hennepin.us