

# HMIS DATA ENTRY INSTRUCTIONS

## SINGLE POINT OF ENTRY DIVERSION

This document contains data entry instructions for HMIS users within CoCs that use diversion at the point of entry in emergency shelters. Questions about the content of this document can be directed to the Minnesota HMIS Helpdesk at [mnhmis@icalliances.org](mailto:mnhmis@icalliances.org).

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## INITIAL INTAKE SCREENING

Determine eligibility for Diversion based your initial conversation with the client. Those clients who meet the current eligibility requirements for diversion should be enrolled in your provider. No HMIS data entry is required for ineligible clients.

### FIND OR CREATE A CLIENT RECORD IN HMIS

1. Verify that you are using the correct provider to enter data. If not, click on [Enter Data As \(EDA\)](#) and select your diversion provider from the pop-up window.
2. Open [Clients](#) and search for the client/head of household being screened.
  - a. If a matching client record appears in the search results, verify that the record is shared statewide before proceeding. Review and update any client profile information that is not accurate.

Client Results					
	ID	Name ▲	Social Security Number	Date of Birth	Alias
	1015945			09/19/1991	SHARED
	178177			05/05/1955	
	1042882			08/11/2015	SHARED

*\*Check for the word SHARED in the "Alias" field. While a seven-digit record may be shared, depending on a client's preferences, records with a six-digit ID are never shared.*

- b. If there are no matching results, create a new client record.
    - Review the HMIS ROI with the client and [document their consent](#).
    - **Note:** If a multi-person household is to be enrolled into diversion, then it will be necessary to create client records for all members of the household and to connect those members together on the [Households](#) tab.
3. For clients with existing records, double-check their history in Emergency Shelter projects.
  4. Continue on to the [Diversion Enrollment](#) for all eligible clients.

**End of Screening Instructions**

## DIVERSION ENROLLMENT

Complete the entry assessment while talking through shelter diversion strategies with a client.

### CREATE A NEW ENTRY/EXIT

1. Click on **Enter Data As** and select your diversion provider.
2. Open the record of the client being interviewed. When the **Back Date Mode** pop-up appears, select **Use Current System Date**.
  - If you are working with a multi-person household, you should open the head of household's record.
3. Click on the **Entry/Exit** tab, then select **Add Entry/Exit**.
4. Make the following selections in the **Project Start Data** pop-up:
  - **Household Members**: Check the box next to the name of every household member that is being served together with the head of household.
  - **Provider**: Your diversion provider. (This should be filled in automatically.)
  - **Type**: Select **Basic**.
  - **Project Start Date**: The date the client was interviewed.

**Household Members**

(234162) Two Parent Family

(1001244) [Name]

(1002351) [Name]

(1001245) [Name]

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**Project Start Data - (1001244)**

<b>Provider *</b>	[Yellow Highlighted]	Search	My Provider
<b>Type *</b>	-Select- ▼		
<b>Project Start Date *</b>	[Date Picker]	[Time Picker]	[Time Picker]

5. Click on **Save & Continue** to proceed to the Diversion Entry assessment.



## COMPLETE THE DIVERSION ENTRY ASSESSMENT

1. Fill out the assessment as accurately and completely as possible, paying special attention to the following:

### HOUSEHOLDS

Complete the full assessment for the head of household **only**. For other members of the household, make note of sections that are for **All Clients** or for **All Adults (18+)** when entering information, as not all sections of the assessment are required for all members.

### COORDINATED ENTRY ASSESSMENT SUB-ASSESSMENT (HEAD OF HOUSEHOLD)

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

Showing 1-2 of 2

A new row should be added each time a client has a new Diversion entry created for them.

- If there is an existing row without an [End Date](#), edit that row and enter an [End Date](#) that is one day prior to your interview date. Your new row **should not** be given an [End Date](#) as it contains the most up-to-date information.
- When adding a new row, complete the following fields:
  - [Date of Assessment](#): The date of the interview.
  - [Assessment Location](#): The location where the interview was completed.
  - [Assessor Details \(Name, Phone, Etc.\)](#): Your information.
  - [Assessment Type](#): Select the most accurate option.
  - [Assessment Level](#): Select **Housing Needs Assessment**.
  - [Prioritization Status](#): Select **Not Placed on Prioritization List**.

**COORDINATED ENTRY EVENT SUB-ASSESSMENT (HEAD OF HOUSEHOLD)**

Coordinated Entry Event							
	Start Date	* Event *	Location of Crisis Housing or Permanent Housing Referral	Housing Provider Contact Name	Date Referral Acknowledged	Referral Result	D R
	11/01/2020	Problem Solving/Diversion/Rapid Resolution intervention or service					

Add Showing 1-1 of 1

- This sub-assessment is also used to track Coordinated Entry housing referrals. **Do not** make any changes to housing referrals that you find in the sub-assessment.
- A new row should be added each time a client has a new diversion entry created for them.
- When adding a new row, complete **only** these three fields:
  - **Start Date:** Enter the date of the client’s interview.
  - **Date of Event:** Same as the **Start Date**.
  - **Event:** Select **Problem-Solving / Diversion / Rapid Resolution intervention or service**.

Coordinated Entry Event	
<b>Start Date *</b>	11 / 18 / 2020    G
<b>Date of Event *</b>	11 / 18 / 2020    G
<b>Event *</b>	Problem Solving/Diversion/Rapid Resolution intervention or service
<b>If 'Event' answer was 'Problem Solving/Diversion/Rapid Resolution intervention or service' answer the following question:</b>	
Problem Solving/Diversion/Rapid Resolution intervention or service result - Client housed/re-housed in a safe alternative	-Select-  G

*\*Only the top three fields should be filled out at the time of interview.*

2. Click **Save & Exit** at the bottom of the assessment when you are finished entering data.

## RECORD FINANCIAL SERVICE TRANSACTIONS

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1. On the [Service Transaction](#) tab of the head of household, select **Add Service**.
2. Make the following selections in the [Add Service](#) pop-up:
  - a. **Household Members**: Check the box next to the name of the member of household that is receiving this service (typically **only** the head of household for financial services).
  - b. **Provider**: Your diversion provider. (This should be filled in automatically.)
  - c. **Start Date**: The date the service was provided.
  - d. **Service Type**: Select the appropriate service from the drop-down.
3. Select **Save & Continue**.
4. Scroll down to the [Funding Sources](#) section and select **Add Funding Source**.

Apply Funds for Service	
Funding Sources	
Source	Amount
<a href="#">Add Funding Source</a>	<input type="button" value="Calculate"/> <b>Total: \$0.00</b>

5. Select the appropriate funding source for your project and enter the [Amount](#) provided at the end of that row.
6. Select **Save & Exit** at the bottom to complete the service transaction.



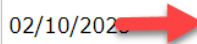

**End of Diversion Enrollment Instructions**

## DIVERSION EXIT




Complete the exit assessment for the client on the **same day** of the diversion provider enrollment.

### ADD EXIT DATA

1. Click on **Enter Data As** and select your diversion provider.
2. Open the record of the client whose case is being closed. When the **Back Date Mode** pop-up appears, select **Use Current System Date**.
  - a. **Note:** If you are working with a multi-person household, you should have the head of household's record open.
3. Click on the **Entry/Exit** tab and find the open entry for your **Coordinated Entry Diversion** provider. Select the **edit pencil** next to the empty **Exit Date** field.

Entry / Exit			
Program	Type	Project Start Date	Exit Date
 CCSPM-HP-HCC-<><>-CED-Hennepin County Diversion (5084)	Basic	 02/10/2023 	

4. Fill out the following fields in the **Edit Exit Data** pop-up:
  - a. **Household Members:** Check the box next to the name of every household member attached to the entry.
  - b. **Exit Date:** The date that you are completing the review.
  - c. **Destination:** Select the most accurate answer.

Edit Exit Data - (1001244)	
<b>Exit Date *</b>	<input type="text" value=""/> / <input type="text" value=""/> / <input type="text" value=""/>    <input type="text" value=""/> : <input type="text" value=""/> : <input type="text" value=""/> <input type="text" value=""/>
Reason for Leaving	<input type="text" value="-Select-"/>
If "Other", Specify	<input type="text"/>
<b>Destination *</b>	<input type="text" value="-Select-"/>
If "Other" Specify	<input type="text"/>








5. Click on **Save & Continue** to proceed to the diversion exit review assessment.

## COMPLETE THE DIVERSION EXIT ASSESSMENT

1. Fill out the assessment as accurately and completely as possible, paying special attention to the following:

### COORDINATED ENTRY EVENT SUB-ASSESSMENT (HEAD OF HOUSEHOLD)

Edit the [Problem-Solving/Diversion/Rapid Resolution](#) row you created during the client's entry interview and make a single update: Answer the "Yes/No" question **Intervention or Service Result - Client housed/re-housed in a safe alternative?**

Coordinated Entry Event	
Start Date *	11 / 18 / 2020    G
Date of Event *	11 / 18 / 2020    G
Event *	Problem Solving/Diversion/Rapid Resolution intervention or service
<b>If 'Event' answer was 'Problem Solving/Diversion/Rapid Resolution intervention or service' answer the following question:</b>	
Problem Solving/Diversion/Rapid Resolution intervention or service result - Client housed/re-housed in a safe alternative	<input type="text" value="-Select-"/>  G

2. Select **Save & Exit** at the bottom of the assessment when you are finished entering data.
3. Next steps:
  - a. For clients that were not successfully diverted and still require shelter, continue on to [Refer to Shelter Connection Team](#).
  - b. For clients that are receiving extended diversion services, go to [Diversion Follow-Up](#) upon completion of that assistance.
  - c. For all other diversion clients, data entry in HMIS is complete.

**End of Diversion Exit Instructions**



## REFER TO SHELTER CONNECTION TEAM

For clients who are eligible but **not successfully diverted**, a referral to the **Shelter Entry Team** needs to be created.

## CREATE A REFERRAL TO EMERGENCY SHELTER

1. On the [Summary](#) tab of the client record, scroll to the bottom of the page and update the [Diversion and Shelter Referral Form](#), including the notes section.
2. While still on the [Summary](#) tab, find the [Outstanding Outgoing Referrals](#) section and select **Add Referral**.
  - Alternatively, from the [Service Transaction](#) tab, you can also select **Add Referral**.

When the referral screen loads, follow these steps to create a referral and send an automated email:

1. Make a referral for the head of household **only**, skip past the [Household Members](#) section.
  - **Note:** A referral should never be created for additional members of a household.
2. Select **Emergency Shelter** (A) from the [Service Code Quicklist](#), then select **Add Terms** (B).
3. Choose the appropriate provider from the [Provider](#) drop-down menu (C), then select **Add Provider** (D).

**Needs Assignment**

Select up to 5 Needs

**Service Code Quicklist**

- Emergency Shelter (BH-1800) **A**
- Mortgage Payment Assistance (BH-3800.5000)
- Rental Deposit Assistance (BH-3800.7250)
- Rent Payment Assistance (BH-3800.7000)
- Transportation Expense Assistance (BT-8300)
- Undesignated Temporary Financial Assistance (NT-8900)
- Utility Service Payment Assistance (BV-8900.0200)

**Add Terms** **B** Service Code Look-Up Add Terms & Go To Search Results

**Referral Provider Quicklist**

Provider **-Select-** **C** **Add Provider** **D** Add Availability

*\*Selecting a value from the Service Code Quicklist (A + B) and the Referral Provider Quicklist (C + D) will set the referral's type and target provider.*

4. All other fields can remain default.
5. Scroll down and select **Save ALL**.

**End of Referral Instructions**

## REPORTING

A selection of reporting tools that are applicable to Diversion.

### 030 MN CORE HOMELESS PROGRAMS REPORT

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**Purpose:** To see the number of clients served in a time period, along with contextual information like demographics and exit destinations.

**Location:** BusinessObjects

**Prompts:**

- **Select Provider(s):** Select your provider ID
- **Enter Start Date:** Enter the first date of the reporting period.
- **Enter End Date (PLUS 1 Day):** Enter the last date of the reporting period, plus 1 day.
- **Enter Effective Date:** Match the End Date.
- **Limit to Veterans ONLY?** Select “No” unless there is a need to see only veterans’ data.
- **Include Income?** Select “No” (income is not collected by the diversion program).

Resources: [ReportCollection Card](#)

### COORDINATED ENTRY APR

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**Purpose:** To see the number of Diversion interventions that took place within a time period and the number of clients who were safely housed or re-housed.

**Location:** Reports Module Dashboard

**Prompts:**

- **CoC Code:** Select your CoC
- **Scope:** Select “Project-Focused”
- **Provider Type:** Select “Provider”
- **Provider:** Select your provider ID
- **Program Date Range:** Enter the desired reporting date range.
- **Entry/Exit Types:** Check the box next to each entry type.

Resources: [Knowledge Base Article](#)

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## REFERRALS REPORT

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**Purpose:** To see the number and target provider of clients referred to shelter within a time period, as well as the referrals' outcomes.

**Location:** Reports Module Dashboard

**Prompts:**

- **Provider:** Select your provider ID and "This provider ONLY"
- **Referral Type:** Select "Outgoing referrals from provider"
- **Referral Status:** Select the desired value. Referrals without an outcome are considered "Outstanding".
- **Referral Outcome:** Select the desired value. An outcome cannot be chosen when reporting only on outstanding referrals.
- **Referral Date Range:** Enter the desired reporting date range.
- **Sort Order:** Add all columns except for the VI-SPDAT columns.

**Resources:** N/A

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## SERVICE TRANSACTION REPORT

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**Purpose:** To see the number and type of financial services provided within a time period and to see the number and target provider of clients referred to shelter within a time period.

**Location:** Report Dashboard

**Prompts:**

- **Provider:** Select your provider ID
- **Provider Search Type:** Select "The selected provider only"
- **Services:**
  - For financial services, check only the "Services Provided by my provider (Non-shelter stays)" box.
  - For shelter referrals, check only the "Referrals Made by my provider" box.
- **Service Code:** Skip unless there is a need to see only results for a specific type of financial service.
- **Need Date Range:** Enter the desired reporting date range.
- **Service Provided Date Range:** Match the Need Date Range.
- **Need Outcome:** All

**Resources:** [Knowledge Base Article](#)