HENNEPIN FAMILY SHELTERS WORKFLOW

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HENNEPIN COUNTY FAMILY SHELTERS

Family Shelters in Hennepin County work directly with the Hennepin County Shelter Team to receive referrals for families appropriate for their programs. The Family Shelter and Hennepin Shelter Team workflows depend on common data for voucher dates for families in shelter and this workflow will allow the agencies to create data and reports in HMIS to reflect this.

REFERRAL CHECK-IN

This should happen daily. New and re-voucher referrals are sent from Hennepin County regularly. Referrals are a way to confirm who is authorized to stay in shelter from Hennepin County.

- 1. Log into HMIS
- 2. EDA to your shelter provider

Provider Search			Mode: 👸 s	nter Data As			
Search for Providers by using ke	eywords from the Provid			ack Uate			
Search							
Search	Clear				Type nere	for Global Search	8
Provider Number					L		
Enter or scan a Provider ID nun	nber to search for that	Provider.			- E	Switch to Another Hou	sehold Member-
Provide ID #	Sub	mit			-		
Proviner Search Re	sults				iys	Entire Ser	vice History
• • • C D E F G	HIJKLM	NOP	QRSTUV	w x y z <u>A</u>			
	Louol	Phone	Location	i act lindatod			
Provider	Level 4	Unknown	Minneapolis, MN 55415	12/08/2017			
Provider	Level 4	Unknown	Minneapolis, MN 55415 Minneapolis, MN	12/08/2017 09/25/2017		More	Search
Provider	Level 4	Unknown	Minneapolis, MN 55415 Minneapolis, MN 55415	12/08/2017 09/25/2017	Need Type	More Need Status	Search Need Out
Provider 0 0 0 0	Level 4 Level 4 Level 4	Unknown Unknown Unknown	Minneapolis, MN 55415 Minneapolis, MN 55415 Unknown	225/2017 09/25/2017 09/15/2015	Need Type Homeless Shelter	More Need Status Identified	Search Need Out
Provider	Level 4 Level 4 Level 4 Level 4	Unknown Unknown Unknown Unknown	Minneapolis, MN 55415 Minneapolis, MN 55415 Unknown Minneapolis, MN 55415	12/08/2017 09/25/2017 09/15/2015 09/21/2017	Need Type Homeless Shelter Homeless Shelter	More Need Status Identified Closed	Search Need Out
Provider	Level 4 Level 4 Level 4 Level 4 Level 4 Level 4	Unknown Unknown Unknown Unknown Unknown Unknown Unknown	Minneapolis, MN 55415 Minneapolis, MN 55415 Unknown Minneapolis, MN 55415 Unknown	Description 12/08/2017 09/25/2017 09/15/2015 09/21/2017	Need Type Homeless Shelter Homeless Shelter	More Need Status Identified Closed	Search Need Out Fully Met
Provider 0 0 0 0 0 0 0 0	Level 4 Level 4 Level 4 Level 4 Level 4 Level 4	Unknown Unknown Unknown Unknown Unknown Unknown Showing 1-5	Minneapolis, MN 55415 Minneapolis, MN 55415 Unknown Minneapolis, MN Minneapolis, MN Minneapolis, MN 55415	09/25/2017 09/25/2017 09/15/2015 09/21/2017 09/21/2015	Need Type Homeless Shelter Homeless Shelter	More Need Status Identified Closed	Search Need Out Fully Met

3. On your homepage click the blue number for the Incoming Referrals box of the Count Report

📌 Home > Home Page Dashboard							
▶ Count Details - Joutstandi 🛛	System News	(1)	Agency News (0)				
Last Viewed Favorites	Date	Headline					
Home	06/01/2016	06/01/2016 Email us with your data entry and reporting questions! mnhmis@icalliances.org					
ClientPoint							
ResourcePoint							
SkanPoint							
Reports							
P Admin							
Logout				View All			
	/ Counts	Report					
	Outstanding In	coming Referrals:	Clients With An Entry But No Exit:				
•		3	3				
				Refresh			

a. Click on the client ID# for the client that you want to resolve the referral for

		_	🔻 Count	t Details						×	
je	Dashboa	ard	Out	Outstanding Incoming Referrals							
1	System News	; (1)	Client ID	Call Record ID	Group ID	Household ID	Referral Date	Referral Ranking	Need Type	Referred By	
l h			4		17	2	01/24/2018		Homeless Shelter	Hennepin She	
	Date	Headline	5		17	2	01/24/2018		Homeless Shelter	Hennepin She	
	06/01/2016	Email us with your data	e 6		17	2	01/24/2018		Homeless Shelter	Hennepin She	
			Down	load Full Report			Showi	ng 1-3 of 3		>	
			I 1								
	Counts	coming Referrals:									
	,	,									
		36									
								Refresh			

ALTERNATIVE REFERAL CHECK-IN SEARCH METHOD

- 1. Log into HMIS
- 2. EDA to your shelter provider
- 3. Navigate to the Reports Tab



4. Select the Referrals Report

Report Dashboard

Provider Reports	
Call Record Report	Client Served Report
Entry/Exit Report	ESG CAPER (HDS V5)
Referrals	Service Transaction

- 5. Run Referral Report
 - a. Provider: Should default to your EDA provider for the shelter
 - b. Referral Type: Incoming referrals to provider
 - c. Status: Outstanding
 - d. Date Range: Select Today's date
 - e. Click "Build Report"

Report Options

Provider *	Beacon FMF-ES-HCC-<><> (294)	~	
	O This provider AND its subordinates	This provider ONLY	
Referral Type*	Incoming referrals to provider		
Referral Status	Outstanding		
Referral Outcome	-All- 🗸		
Referral Date Range	/// 🤕 🤯	01 / 04 / 2019 77 3 23	
Sort Order	Please Select a Sort Order	Select Clear	
Export Report			Build Report

6. Select the client you want to resolve the referral for. Choose the HoH first.

Report Results								
Referral Date 🔻	Name	Group ID	Ranking	Need Type	Referred By	Referred To	Referral Outcome	Need Notes
11/20/2018 12:00:00 AM	(485) Redd, Ruby NMN	155	Medium	Homeless Shelter	Hennepin Shelter Team- CE-HCC	Beacon FMF-ES-HCC- <><>		
11/20/2018 12:00:00 AM	(487) Redd, Jamie Lynn	155	Medium	Homeless Shelter	Hennepin Shelter Team- CE-HCC	Beacon FMF-ES-HCC- <><>		
11/20/2018 12:00:00 AM	(486) Redd, Emmie Jane	155	Medium	Homeless Shelter	Hennepin Shelter Team- CE-HCC	Beacon FMF-ES-HCC- <><>		

ACCEPT OR DECLINE REFERRAL

1. Use current system date (for live data entry)

Back Date Mode	×							
🛕 The current System Date is set to:								
If you would like to use a different date, please select one below:								
Back Date 03 / 01 / 2018 🔊 🧞 12 🖓 : 00 🗸 : 00 🗸 AM 🛇	-							
Set New Back Date Use Current System Date								

On the client Summary Page, scroll to the Outstanding Incoming Referrals Section

Outstanding Incoming Referrals							
Referral Date	Referring Provider	Need Type					
10/12/2019	Hennepin Shelter Team-CE-HCC	Homeless Shelter					
Add Referral	Showing 1-1 of 1						

- 2. Click the edit pencil next to the referral you want to resolve
 - a. Confirm all household members are checked who will be staying for that voucher
 - b. Your referral data should be as follows for an acceptance into shelter:
 - i. Referral outcome = accepted
 - ii. Need status = closed
 - iii. Outcome of need = fully met
 - iv. Click save and exit

Referral Data						
Referred-To Provider	PSP Housing Programs-ES-HCC<>Shelter (891)					
Needs Referral Date*	10 / 27 / 2017 🥂 🎝 🥇 3 🗸 : 57 🖓 : 37 🗸 PM 🗸					
Referral Ranking	-Select- v					
VI-FSPDAT Score	Please Select a VI-FSPDAT Score Search Clear					
Referral Outcome	Accepted					
Follow Up Information						
Projected Follow Up Date	10 / 29 / 2017 🔊 🔿 🦉					
Follow Up User	Hennepin Shelter Team-CE- HCC (3794) Search My Provider Clear Abbey Fahnhorst v					
Follow Up Made	-Select- 🗸					
Completed Follow Up Date						
Need Status and Outcome						
Need Status *	Closed					
Outcome of Need	Fully Met					
If Need is Not Met, Reason	Select-					

- c. If not accepted
 - i. Outcome:
 - 1. Provider choice: Canceled
 - 2. Client choice: Declined
 - ii. Need status: Closed
 - iii. Outcome of need: Not met
 - iv. Reason: Select most appropriate reason
- d. Save and Exit

OR To resolve multiple referrals for the client at the same time

- 1. Go to the Service Transactions tab on the client record
 - a. Click view entire service history

Client Information		Service Transaction	Service Transactions				
Service Transaction Dashboard							
Add Need	Note Add Service	Add Multiple Services	Add Referrals	View Previous Service Transactions			
View Shelter Stays	View Entire Service History						

b. Click on Referrals Sub-tab

C	lient Information			ĭ •	Service Transactions					
	Needs	Servic	:es	Referrals		Shelter Stays		Entire Service	History	
	Previous Referrals									
	Select Dates	Start Date		End Date						
	-Select- V		27 🔵 27		I 🔜 🐹 🔵 🌊	4	More		Search	
	Need Date	Referred Date	Referred To		Referral Outcom	e Need Typ	ne Ne	ed Status	Need Outcome	
	01/24/2018	01/24/2018	PSP Housing Programs-ES-HCC<>She	lter		Homeless	Shelter Ide	entified		
	11/01/2017	11/01/2017	PSP Housing Programs-ES-HCC<>She	lter	Accepted	Homeless	Shelter Clo	sed	Fully Met	
	Add Referral	Add Referral Showing 1-2 of 2								

c. Click the edit pencil next to the referral you want to resolve

CREATE ENTRY/EXIT - 1ST CHECK IN THIS EPISODE (OR CERTAIN CHANGES IN HOUSEHOLD)

- 1. Click client information tab
 - e. Click Entry/Exit tab
 - f. Click add Entry/Exit

ent Information				Service Transactions						
Summary	Client Profile	Households	ROI	Entry / Exit	Case Managers		Case Plans	Asse	sment	s
3		() Reminder: Househ	old members must be establis	hed on Households tab befo	ore creating Entry / Ex	its				
Entry / Exit										
Program			Туре	1	Entry Date		Exit Date	Interims	Follow Ups	Client Count
Hennepin Shelter	Team-CE-HCC (3794)		Basic	2	01/24/2018	/		E.	E.	8
Hennepin Shelter	Team-CE-HCC (3794)		Basic	2	01/23/2018	/		E.	E.	8
Hennepin Shelter	Team-CE-HCC (3794)		Basic	2	01/23/2018	/		E.	E.	a
PSP Housing Prog	grams-ES-HCC<>Shelter (891)		Basic	2	11/16/2017	/	11/16/2017	E.	E.	a
PSP Housing Prog	grams-ES-HCC<>Shelter (891)		Basic		11/01/2017	/	11/17/2017	E.	E.	8
PSP Housing Prog	grams-ES-HCC<>Shelter (891)		Basic	2	11/01/2017	/	11/03/2017	E.	E.	8
Hennepin Shelter	Team-CE-HCC (3794)		Basic	1	11/01/2017	/		E.	E.	8
Add Entry / Exit				Showing	g 1-7 of 7	L				/5

- 2. Click the members of the household that are staying in shelter
 - g. Entry type = Basic
 - h. Confirm the Entry Date is correct
 - i. Click Save and Continue

Entry Data - (4) Potter,	Ginny	×
Household Members		
i To include Household n	nembers for this Entry / Exit, click the box beside each name. (from the SAME Household may be selected.	Only members
2) Two Parent Family (4) Potter, Ginny (6) Potter, Albus (5) Potter, Harry	Click the box next to Family Type to select all family members	
Entry Data - (4) Potter,	Ginny	
Provider *	PSP Housing Programs-ES-HCC<>Shelter (891)	~
Type *	Basic	
Entry Date *	03 / 01 / 2018 🔊 🏹 3 🗸 : 28 🗸 : 08 🗸 PM 🗸	
	Save & Continue	e Cancel

3. Complete the Assigned Assessment

- j. Complete all required questions for each household member in the assessment
 - i. Some of this information will have already been completed by the Hennepin Shelter Team. However, it is a good idea to review and update any section which has not yet be completed or is older than 30 days.
- 4. Click Save & Exit

EXITING THE HOUSEHOLD

The entire Household should be exited whenever:

- The Head of Household leaves, even if temporarily
- The household exits shelter for one night or more, even if the voucher has not yet expired.
- One or more non-head members who had previously exited, has now returned (must exit whole household and re-enter with new family configuration)

On occasion, some household members may leave without exiting the entire household. If so, just exit those members individually. Not the entire household.

- 1. Log into HMIS
- 2. EDA to your shelter provider
- 3. On your homepage click the blue number for the "Clients With An Entry But No Exit" box of the Counts Report

Counts Report	
Incoming Referrals:	C <mark>lients With An Entry But No Exi</mark> t:
0	3
	Refresh
Customize Home Page	Dashboard

- a. Click on client you are checking out.
 - i. If checkout out the entire household, click the HoH first.

Clients With An Entry But No Exit										
Client ID	Last Name	First Name	Middle Name	Suffix	Soc Sec No	Alias	Date of Bi			
2	Gilmore	Loreli			234-09-7238	SHARED Coffee Queen	10/01/1970			
3	Gilmore	Rory			230-78-2308	SHARED Loreli	10/14/2002			
10	Hayden	Chistopher			143-46-5121	SHARED	04/14/1972			

b. Click current system date or backdate to the date the client checked out

Back Date Mo	ode 🛛 🗙							
🛕 The current System Date is set to:								
○ 03/01/2018 2:57:16 PM								
If you would like	If you would like to use a different date, please select one below:							
Back Date 03 / 01 / 2018 🔊 💸 12 🖓 : 00 🗸 AI								
	Set New Back Date Use Current System Date							

- 4. Click on Entry/Exit tab
- 5. Click on edit pencil of Exit Date

	Entry / Exit									
	Program	Туре		Entry Date		Exit Date	Interims	Follow Ups	Client Count	
Ì	PSP Housing Programs-ES- HCC<>Shelter (891)	Basic	/	11/01/2017	/	11/09/2017	Ē.	E.	ø	ŵ
Ì	PSP Housing Programs-ES- HCC<>Shelter (891)	Basic	/	10/27/2017	Ĺ		E.	E.	ø	Å.

- a. Click all clients who exiting
- b. Make sure exit date is correct
- c. Select best Destination
- d. Click Save & Continue

Household Membe		
nousenoid Plembe	3	
(1) To	update Household members for this Exit Data, click the box beside each name.	
(10) Couple With N	lo Children	
(1) Phoenix, The (Exit Date: 12/23/2021 4:16 PM)	
(2) Jacobs, Jane L	(Exit Date: 12/23/2021 4:16 PM)	
a chi		
Telit Exit Data -	1) Phoenix, The	
Exit Date*	12 / 23 / 2021 🕂 🏹 🔿 🦧 🗸 : 16 v : 19 v PM v	
Reason for Leaving	-Select-	
If "Other", Specify]
Destination *	Transitional housing for homeless persons (including homeless youth) (HUD)	
If "Other", Specify]
Notes		

e. Click Save & Continue to complete Exit

REVOUCHERING

You do NOT need to create a new entry/exit line each time a family re-vouchers. Instead, simply accept the current referral. See instructions above in Referral Check-in (pg 2)

You DO need to create a new entry for a family who has been absent from shelter, even temporarily.

- 1. Use whichever method you prefer to locate the outstanding incoming referral
 - a. Note: if already in the client record Go to HoH record **Summary Tab** and Click on **Outstanding Incoming Referrals** dashlet.

Outstanding Incoming Referrals							
Referral Date	Referring Provider	Need Type					
/ 01/24/2018	Hennepin Shelter Team-CE-HCC	Homeless Shelter					
Add Referral	Showing 1-1 of	1					

OR

b. Click on the **Outstanding Incoming Referrals** counts report

System News (1) Date Headline 6/01/2016 Email us with your data o Download Full Report Showing 1-3 of 3 Figure 10 Call Record ID Group ID Household ID Referral Date Referral Ranking Need Type 17 2 01/24/2018 Homeless She 0 01/24/2018 Homeless She C Download Full Report Showing 1-3 of 3
Date Headline 17 2 01/24/2018 Homeless Shell 06/01/2016 Email us with your data 5 17 2 01/24/2018 Homeless Shell 06/01/2016 Email us with your data 6 17 2 01/24/2018 Homeless Shell 06/01/2016 Email us with your data 6 17 2 01/24/2018 Homeless Shell 00wrload Full Report Showing 1-3 of 3 5 5 5 5 5
Date recomme 5 17 2 01/24/2018 Homeless Shell 06/01/2016 Email us with your data e 6 17 2 01/24/2018 Homeless Shell 06/01/2016 Email us with your data e 6 17 2 01/24/2018 Homeless Shell 06/01/2016 Email us with your data e 6 17 2 01/24/2018 Homeless Shell 0 Download Full Report Showing 1-3 of 3 Showing 1-3 of 3
Ob/01/2010 Email us with your data e 6 17 2 01/24/2018 Homeless Shell County Based County Based Bownload Full Report Showing 1-3 of 3
Constant
1 Countries of the Country of the Co
A country Browned
tstanding Incoming Referrals:
20

OR

c. Run a Referral Report for a list of outstanding voucher referrals

- 2. If using options B or C, Select client to accept voucher referral
 - a. Use Current System Date (if doing live data entry)



- 3. Go to the Service Transactions tab on the client record
 - b. Click view entire service history

Cli	ent Information		Service Transactions	Service Transactions					
	Service Transaction Dashboard								
	Add Need	Mdd Service	Add Multiple Services	Add Referrals	View Previous Service Transactions				
	View Shelter Stays	View Entire Service History			,				

- c. Click on Referrals Sub-tab
- d. Click the edit pencil next to the referral you want to accept

Client I	Client Information Service Transactions						5					
Needs Services Referrals			Referrals	Shelter Stays			Entire Service History					
	Previous Referrals											
Sele	ct Dates	Start Date		End Date								
-Se	ect- ~		27, 🕽 23		27, 🔍 Z			More		Search		
	Need Date	Referred Date	Referred To		Referral Outcome	a	Need Type	Ne	ed Status	Need Outcome		
	01/24/2018	01/24/2018 PSP Housing Programs-ES-HCC<>Shelter		Homeless Shelter		er Ide	ntified					
2	🦉 11/01/2017	11/01/2017 PSP Housing Programs-ES-HCC<>Shelter Accepted		Homeless Shelter		er Clo	sed	Fully Met				
	Add Referral				Show	wing 1-2 of 2						
	e. Your referral data should be as follows for an						l Data					
						Referred-To Provider PSP Housing Programs-ES-HCC<>Shelter (891)						
		accept	tance into sheiter:			Needs Referral Date * 10 / 27 / 2017 🛛 💐 3 🛶 : 57 🗸				57 · : 37 · PM ·		
		i.	Referral outcome	= accepted		Referral R	tanking -S	Select- ~				
		ii	Need status - clos	ad		VI-FSPDAT Score Please Select a VI-			FSPDAT Score Search Clear			
			Neeu status – clos	eu		Referral C	Outcome Ac	ccepted	~			
		iii.	Outcome of need	= fully met		Follow Up	Information					
	iv Click save and exit						d Follow Up 10	/ 29 / 2017	7) 🔿 🦧			

iv. Click save and exit

Follow Up User Hennepin Shelter Team-CE-HCC (3794) Search My Provider Clear

Abbey Fahnhorst ~

Completed Follow Up

Follow Up Made -Select- ~

Need Status and Outcome Need Status * Closed -Outcome of Need Fully Met If Need is Not Met, Reason -Select-

WHEN A FAMILY IS REVOUCHERED WITH A CHANGE IN HOUSEHOLD COMPOSITION OR SOMEONE LEAVES THE HOUSEHOLD TEMPORARILY OR PERMANENTLY

NOTE: Be sure to contact the Hennepin County Shelter Team to notify them if there is a change in household composition that did not originate from a Shelter Team referral. You. If you add a new household member without approval from the Shelter Team, you may not be reimbursed for this person's stay.

If the HoH has changed or a previously exited member has returned

- 1. From the HoH record for the previous vouchered stay
 - f. Click on Entry/Exit Tab
 - g. Click the exit pencil to Exit the entire household on the day after all members stayed
 - i. Ex. All members stayed Tuesday night. Exit all members on Wednesday.
 - h. Complete the Exit Assessment
 - i. Do NOT update the Relationship to HoH field on the assessment at this step
 - i. Return to your user home page and look for a new referral with the new household composition
 - j. Accept new voucher referral with new household composition and create a new entry for the household.
 - i. Update Relationship to HoH field on the assessment when creating the new household entry.

If HoH has not changed and members are only being added or removed from the current stay

- 1. Check for a referral from the Shelter Team
- IF no new referral has been sent, search for the HoH Record and skip to step 2.

Go to HoH record Summary Tab and Click on Outstanding Referral dashlet

- k. Click the edit pencil next to the open referral
- I. Complete fields to accept the referral for all appropriate household members
- 2. Go to Entry/Exit Tab
 - a. Edit the existing entry to indicate new or leaving household members
 - i. If some members are exiting
 - 1. Click the exit pencil
 - 2. Select the household members who will not be staying that night
 - 3. Record an exit date that is the day **after** the last night they stayed in shelter
 - 4. Record destination and update exit assessment as needed for each member leaving
 - ii. If some new members are joining
 - 1. Click the entry pencil for the existing shelter stay
 - 2. Click "Add additional household members"
 - a. Select those you would like to add
 - i. Be sure to only select clients from the same Household

- b. Save and Continue
- 3. Click the edit entry pencil and select only newly added members. Change the entry date to match the day they were added to the household's shelter stay.

	Household Members Associated with this Entry / Exit									
		Name	Head of Household		Project Start Date		Exit Date	I		
4	Å¢.	(1) Phoenix, The	Yes		12/06/2021	_				
4	Å¢.	(1073022) Client 78, Test	No		12/15/2021					
4	k	(1068044) Test, Johnny FakeClient	No	1	12/15/2021					

- iii. Complete the Hennepin Family Shelter Entry Assessment for new members. Save for each household member assessment you update.
- iv. Save and Exit