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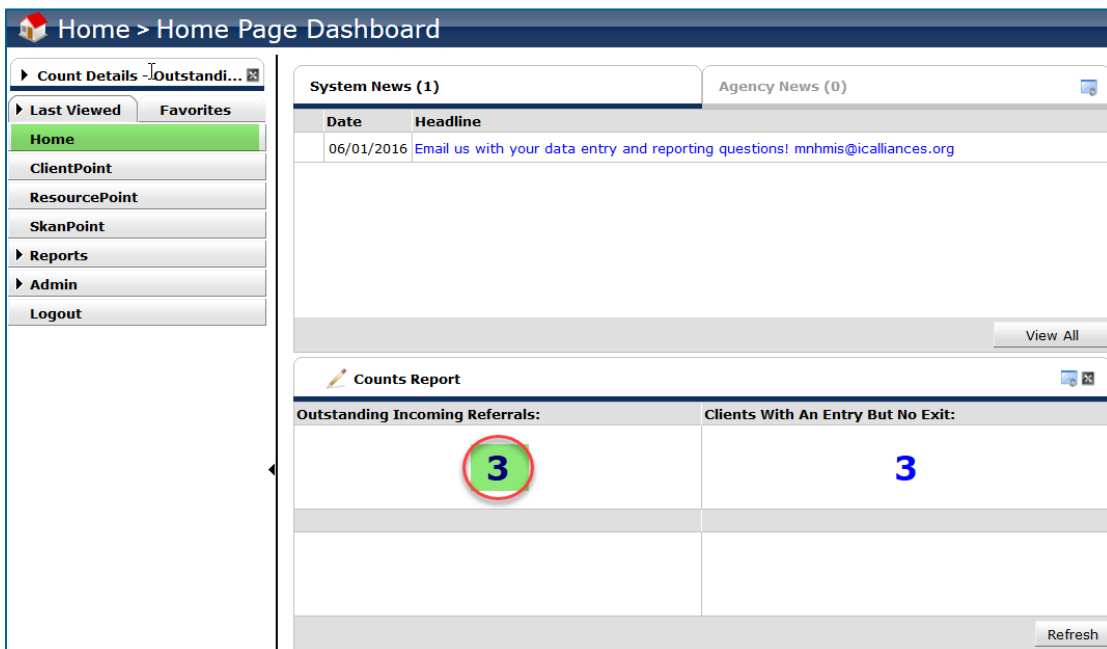
This should happen daily. New and re-voucher referrals are sent from Hennepin County regularly. Referrals are a way to confirm who is authorized to stay in shelter from Hennepin County.

1. Log into HMIS
2. EDA to your shelter provider
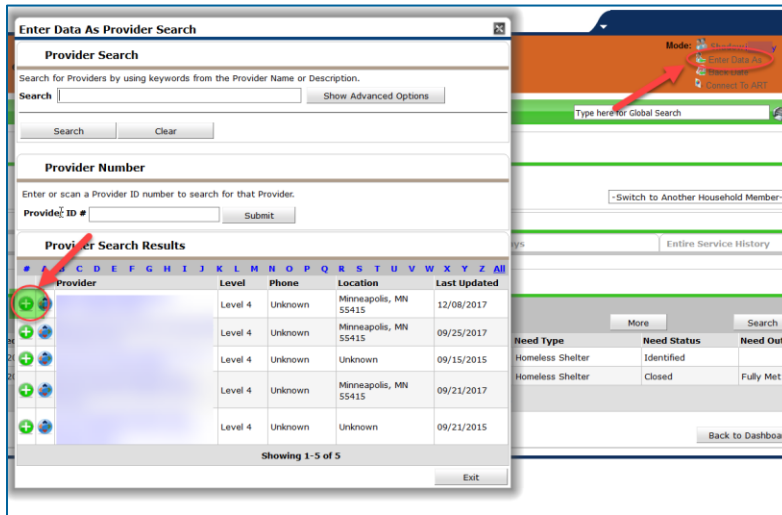
3. On your homepage click the blue number for the Incoming Referrals box of the Count Report

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

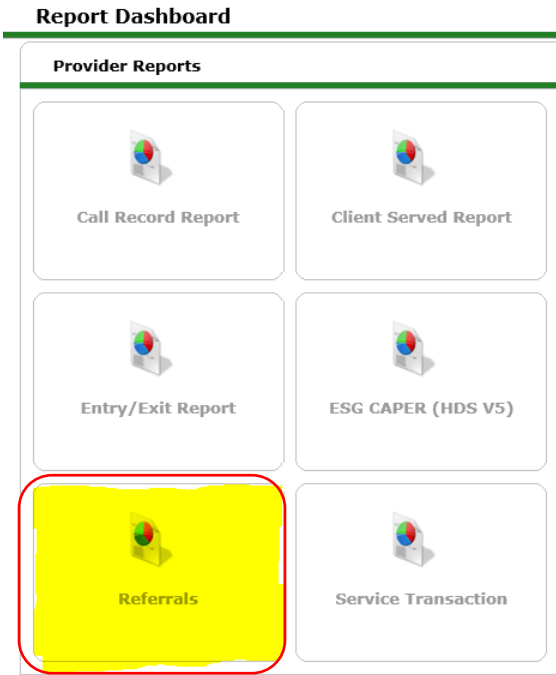## ALTERNATIVE REFERAL CHECK-IN SEARCH METHOD

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)
	○ This provider AND its subordinates ● This provider ONLY
Referral Type*	Incoming referrals to provider
Referral Status	● Outstanding ○ Closed ○ ALL
Referral Outcome	-All-
Referral Date Range	__/__/____ 01/04/2019
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-<><>		

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

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

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

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 Transaction**s tab on the client record
    a. Click view entire service history
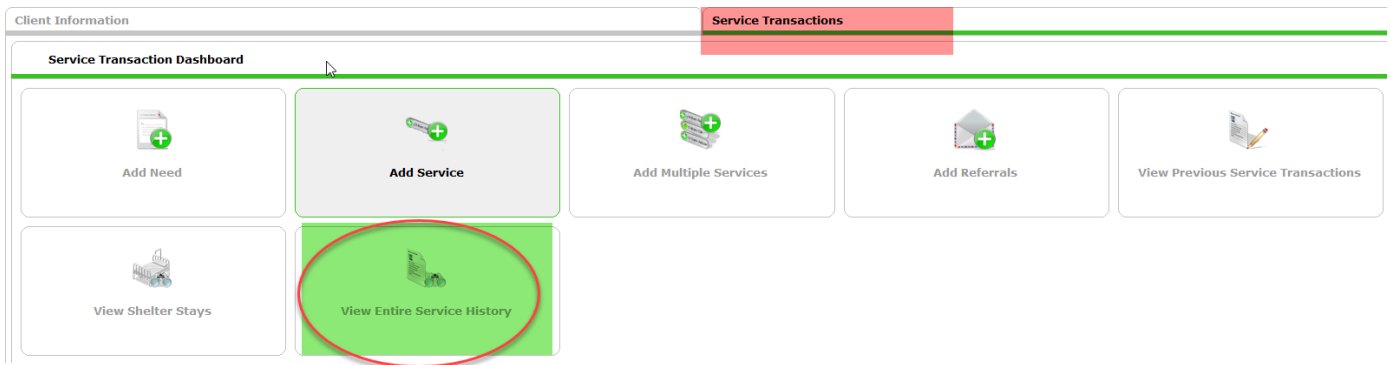
b. Click on Referrals Sub-tab
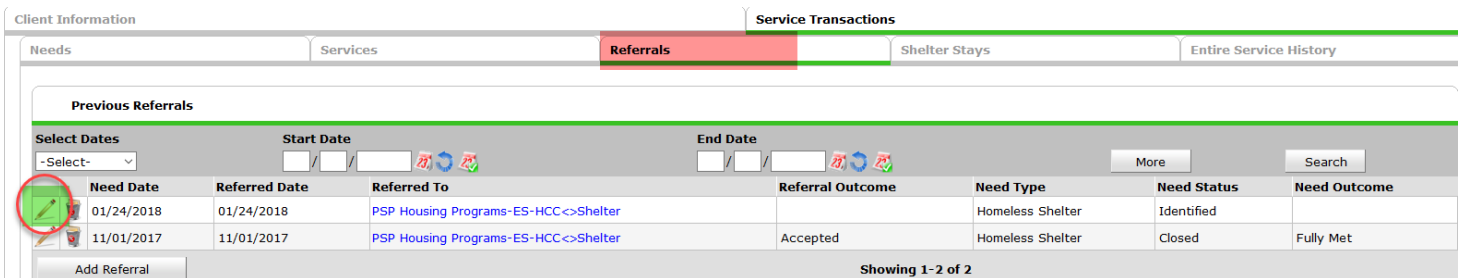
c. Click the edit pencil next to the referral you want to resolve

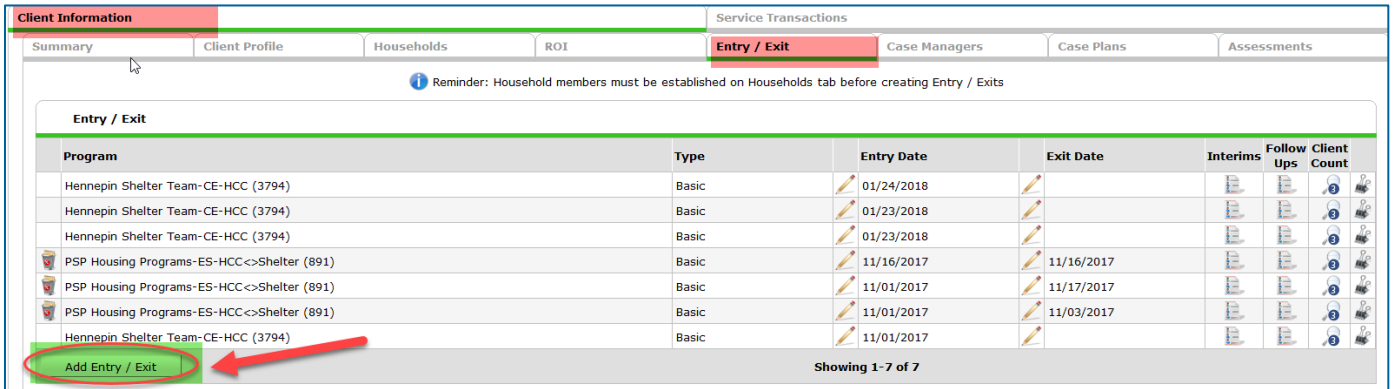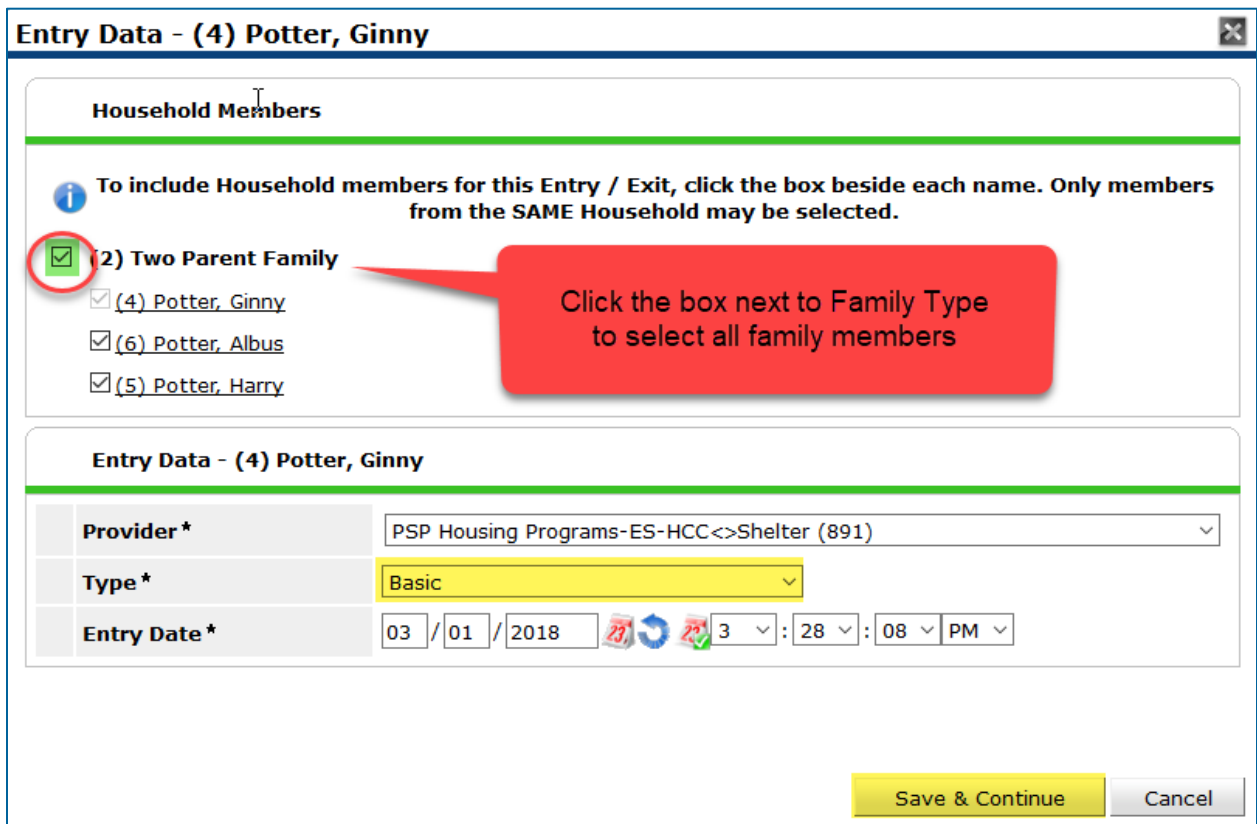## CREATE ENTRY/EXIT – 1ST CHECK IN THIS EPISODE (OR CERTAIN CHANGES IN HOUSEHOLD)

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

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

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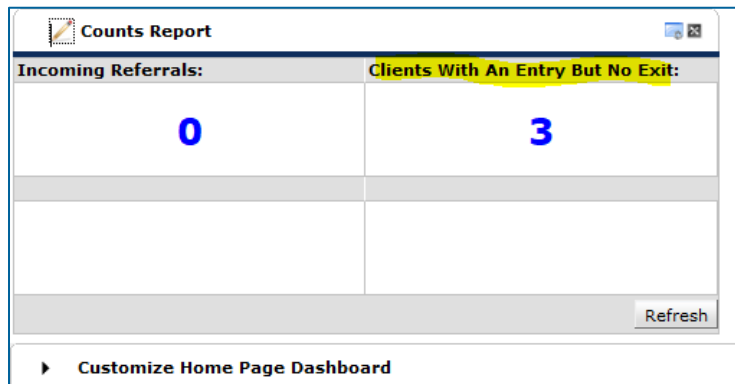
a. Click on client you are checking out.
   i. If checkout out the entire household, click the HoH first.

Client ID	Last Name	First Name	Middle Name	Suffix	Soc Sec No	Alias	Date of Bir
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

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

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

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.

   OR

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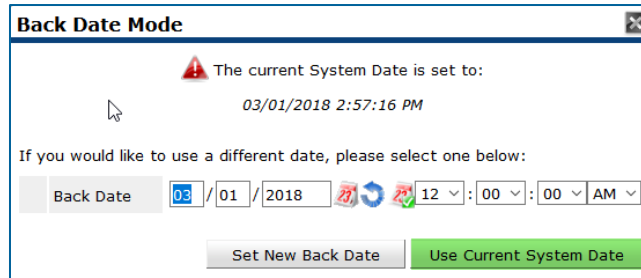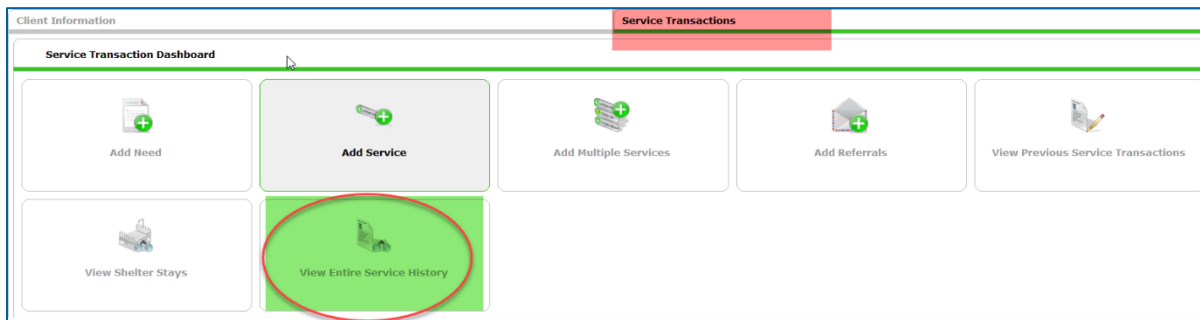

   OR

   **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 Transaction**s tab on the client record
   b. Click view entire service history

   c. Click on Referrals Sub-tab
   d. Click the edit pencil next to the referral you want to accept
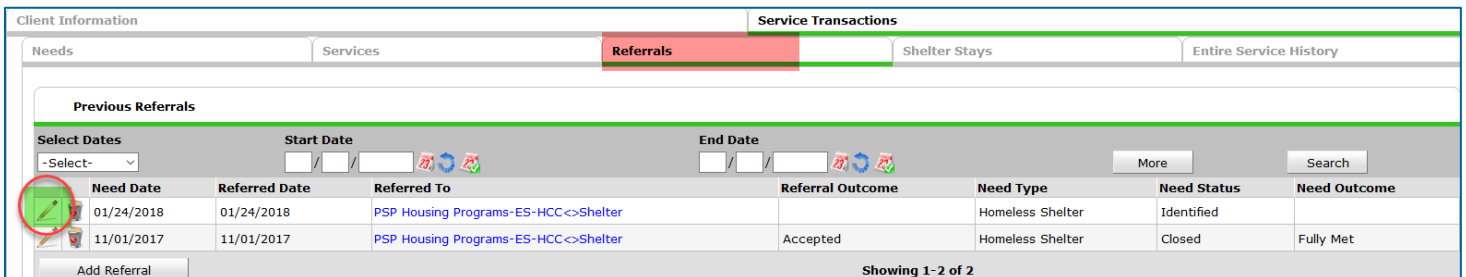
   e. Your referral data should be as follows for an acceptance into shelter:
      i. Referral outcome = accepted
      ii. Need status = closed
      iii. Outcome of need = fully met
      iv. Click save and exit
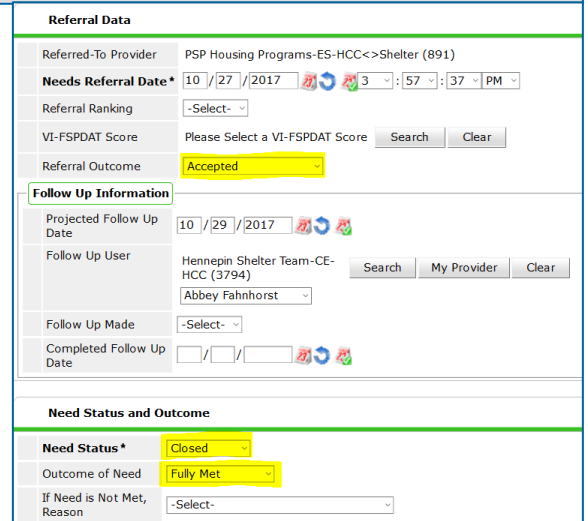
NOTE: Be sure to contact the Hennepin County Shelter Team to notify them if there is a change in household composition that did not originate from a Shelter Team referral. You. If you add a new household member without approval from the Shelter Team, you may not be reimbursed for this person's stay.

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
   l. 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.

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

   iv. Save and Exit