HMIS USER GUIDE FOR HUD ESG PROJECTS

Homelessness Prevention (HP) | Rapid Re-Housing (RRH)

Contents

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QUICK REFERENCE GUIDE

This section provides simplified instructions for common data entry tasks. Please refer to the General HMIS Instructions and upcoming sections of this document for further instruction. Your agency may have a project that receives funding from multiple sources for the same project to serve the same clients.

If you are using a single HMIS provider to report out to multiple funders, you will need to complete the data entry and reporting requirements for *each funder.* For detailed instructions, please refer to the Using one provider for multiple funding sources article found on MN's HMIS Knowledge Base.

<table>
<tr>
<td rowspan="1" style="vertical-align:middle">CREATE A NEW CLIENT RECORD</td>
<td>

1. Enter **EDA mode** as the correct provider and search for the client's record in **ClientPoint**.

   a. If entering data for a household, be sure to search for the head of household.

2. Make sure that the client is not already in HMIS by searching for different combinations of their information.

3. If no records match, fill out all of the search prompts and click on **Add New Client With This Information**.

   a. If the client has consented to participate in statewide data sharing, enter the word **SHARED** in the **Alias** field.

4. When prompted, enter the date of the client's entry into the project and select **Set New Back Date**. If the client entered the project today, select **Current System Date**. (The date can be changed by clicking on **Back Date** in the top-right corner of the screen).

5. Select the **Client Profile** tab and enter any information missing from the **Universal Profile** assessment.

   a. If a client has agreed to statewide data sharing, enter a **Date of ROI Consent**.

6. If the client is being served with other household members, click on the **Households** tab and either add them to an existing household or start a new household.

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ENTER A CLIENT INTO A PROJECT

1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**.

    a. If entering data for a household, be sure to search for the head of household.

2. When prompted, enter the date of the client's entry into the project and select **Set New Back Date**. If the client entered the project today, select **Current System Date**.

    a. Click on **Back Date** in the top-right corner of the screen to change the date.

3. Click on the **Entry / Exit** tab and select **Add Entry / Exit**.

    a. If entering a household, check the box next to each client included in the entry.

    b. Select **HUD** from the **Type** drop-down menu.

    c. If necessary, adjust the **Project Start Date**, then select **Save & Continue**.

4. For each client included in the entry, complete the data elements on the **HUD: ESG Entry for HP and RRH** assessment in the **Entry/Exit Data** pop-up.

    a. If entering data for multiple household members, save time by clicking on **Add Household Data** and completing the **Household Data Sharing** assessment.

UPDATE A CLIENT'S INFORMATION

Clients participating in a **Homelessness Prevention** project must have their information updated every 3 months. **Rapid Re-Housing** projects are required to update information for clients on an annual basis, within 30 days of a client's or head of household's anniversary date.

1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**.

2. Click on the **Entry/Exit** tab, then select the **Interims** icon for the correct Entry/Exit.

3. In the **Interim Reviews** pop-up, click on **Add Interim Review**.

    a. Select **Annual Assessment** (RRH projects) or **90-Day Review** (HP projects) from the **Interim Review Type** drop-down menu.

    b. If serving a household, be sure to include all applicable household members in the entry by checking the boxes next to their names.

4. In the **Entry/Exit Interim Review** pop-up, review the **HUD: CoC & ESG Update** assessment answers. Update any answers that are no longer correct with the latest accurate information.

EXIT A CLIENT FROM A PROJECT

1. Enter **EDA mode** as the correct provider and open the client's record in **ClientPoint**.

2. Click on the **Entry/Exit** tab, then select the **edit pencil** (in the **Exit Date** column) next to the correct entry.

    a. If exiting a household, be sure to include all applicable household members in the exit by checking the boxes next to their names.

    b. Enter the correct **Exit Date** and **Destination**, then click on **Save & Continue.**

3. Complete the **HUD: CoC & ESG Exit** assessment for each household member.

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RUN A REPORT

For more information about HUD ESG Reports, refer to the user guide section Reporting Guidelines.

1. Click on **Reports** to open the **Report Dashboard**. Select **ESG CAPER**.

2. Fill out the prompts in the **Report Options** section, then click on **Build Report**.

3. Review sections **6a – 6f** to identify data quality issues.

4. Click on **Download** to get a zip archive containing the CSV files required for submission to Sage.

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DATA COLLECTION FORMS

DATA COLLECTION FORMS FOR HUD ESG PROJECTS CAN BE FOUND BY VISITING THE FORMS AND INSTRUCTIONS PAGE ON THE MINNESOTA HMIS WEBSITE. THESE FORMS WILL CHANGE AS NEW DATA STANDARDS ARE RELEASED BIANNUALLY ON OCTOBER 1. THERE ARE BOTH PDF AND WORD VERSIONS AVAILABLE FOR DOWNLOAD.

You are not required to use ICA's data collection forms. Staff responsible for data collection should also be aware that their agency may require them to gather non-HMIS data that is not captured by these forms.

PROGRAM-SPECIFIC DATA ELEMENTS

Program Specific Data Elements have been chosen by your funder and are often unique to the types of projects they fund. More information about these data elements can be found in the HMIS Data Standards Manual.

W5 HOUSING ASSESSMENT AT EXIT

Project Type Applicability: Homelessness Prevention

Data Collected About: All Clients   **Data Collection Point:** Project Exit

Rationale: To determine whether clients exiting prevention projects have remained stably housed.

Data Collection Instructions: Determine the response value that best describes the client's housing circumstances from project entry to project exit.
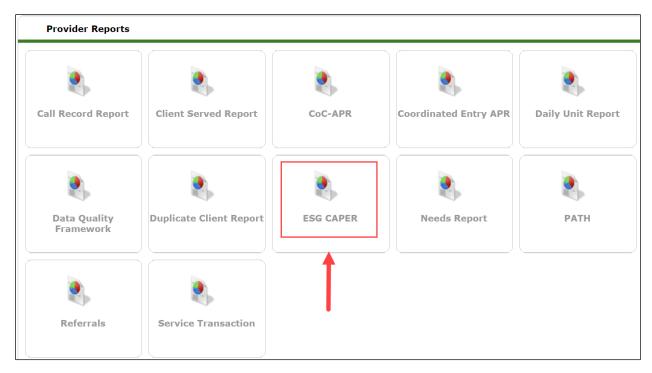
REPORTING GUIDELINES

This section introduces the data quality and funder-required reports for HUD ESG projects. Users should run data quality reports regularly to ensure that accurate information is being provided to funders and other agencies.
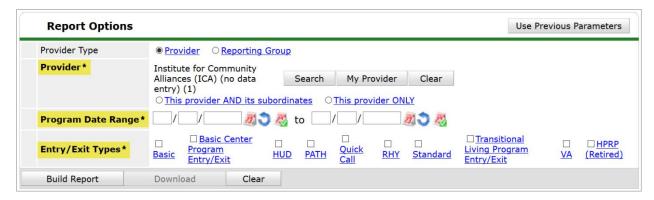
DATA QUALITY REPORTS

Name: ESG CAPER
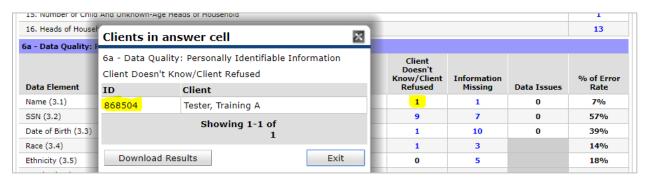
Location: Report Dashboard

Report Instructions: Complete these required prompts, then click on *Build Report*. Select *Use Previous Parameters* to load the most recently used prompts.

- Provider: Select *Provider* if looking at a single provider's data; select *Reporting Group* if looking at multiple providers' data.
- Provider Type: Select *Search*, then find the provider or reporting group whose data you would like to include in the report.
- Program Date Range: Enter the report's start and end dates.
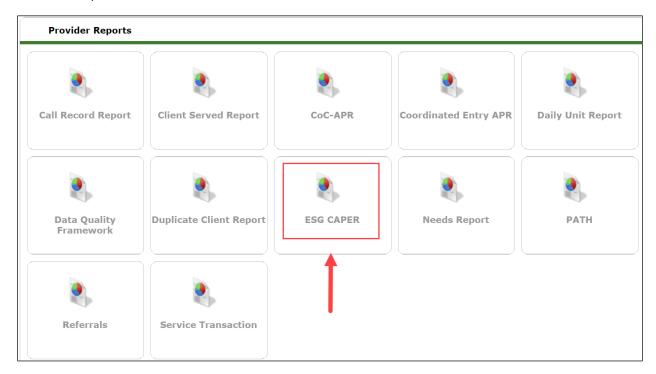- Entry/Exit Types: Select *HUD*.

Data Quality Instructions: Sections 6a – 6f of the CAPER are focused on data quality. To view client records flagged as containing an error, click on the blue number in the desired cell.
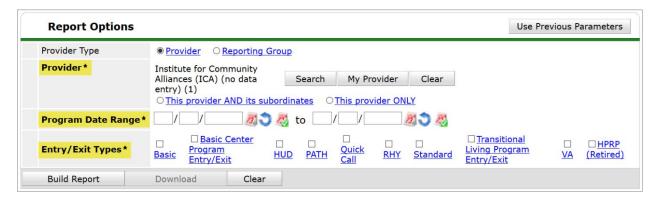
FUNDER-REQUIRED REPORTS

Name: ESG CAPER

Location: Report Dashboard

Required Prompts: Provider, Program Date Range, Entry/Exit Types

Submission Frequency: Annually, within 90 days of grant year-end

Submission Instructions: Beginning in October 2017, ESG recipients should upload their CAPERs to the Sage HMIS Reporting Repository (Sage). ESG sub-recipients will be sent a hyperlink by their grantees that they can use to submit their own CAPERs to Sage.

- ESG grantees are responsible for communicating report due dates to sub-grantees.

- Review the ESG CAPER instructions from MN's HMIS Knowledge Base for detailed information on where to find the report and how to run this report. It also includes tips on analyzing the report's content, and guidance for submitting the CAPER to your ESG grantee.