

HENNEPIN COC: CES CARE COORDINATOR HMIS USER GUIDE

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OVERVIEW OF CES CARE COORDINATOR ROLE

This role is designed to help clients navigate the CES System. Users in this role will...

1. Determine the client's CES status
2. Refer clients for CES assessment
3. Update certain pieces of the client record and CES Assessment
4. Identify other persons working with the client and help make connections for CES
5. Connect clients with housing providers where referrals are pending

CES STATUS REVIEW

Status	Care Coordinator Role
Client is not on the CES Priority List	<ul style="list-style-type: none">• Connect user with an appropriate assessor to have an assessment completed
Client has no CES Assessment	<ul style="list-style-type: none">• Connect user with an appropriate assessor to have an assessment completed
Client's CES Assessment is not current	<ul style="list-style-type: none">• Connect user with an appropriate assessor to have an assessment completed
Client has a CES Assessment but no current referral to housing	<ul style="list-style-type: none">• Work with client to identify housing opportunities not through CES• Update the client's HMIS record and CES Assessment as needed
Client has a CES Assessment and has a current referral to housing	<ul style="list-style-type: none">• Help connect the client to the housing provider listed• Update the client's HMIS record and CES Assessment as needed

APPROPRIATE ASSESSOR

Use the following information to connect a user to an appropriate assessor

- If original assessor is still an appropriate contact, connect client to original assessor
- Client is in shelter: Connect client to an assessor at that shelter
- Client is a single person (will not be housed with minor children) not in shelter: View the Hennepin County webpage for info about connecting with a mobile assessor. <https://www.hennepin.us/coordinated-entry>
- Client is part of a family (will be housed with minor children): Contact Front Door at 612-348-4111
- Email CES.hennepin@hennepin.us and ask for an assessor to contact the client to schedule an assessment

CURRENT ASSESSMENT

A client needs a new assessment in the following circumstances. If any of these are true, only and refer client to an appropriate assessor for a new CES Assessment.

- Singles:
 - A client's most recent assessment is over one year old
 - A client has encountered a significant life change or event, which may directly impact and change the type of housing intervention they receive
 - A single adult or youth becomes pregnant or parenting needs re-assessment in the family system
- Families:
 - A family has encountered a significant life change defined as one of the following items: A second adult member added or removed to their family, re-unification with child, significant family composition change, or SPMI identified by a credentialed professional.

HENNEPIN COC CES CARE COORDINATOR WORKFLOW

REVIEW HMIS RECORD AND CES ASSESSMENT

LOG IN TO HMIS AND EDA TO CES CARE COORDINATOR PROVIDER

1. Log into HMIS
2. EDA to CES Care Coordinator provider (5302)
 - a. If CES Care Coordinator is your only role and you “Sit” at this provider, no need to EDA

Enter Data As Provider Search

Provider Search
Search for Providers by using keywords from the Provider Name or Description.
Search Show Advanced Options

Provider Number
Enter or scan a Provider ID number to search for that Provider.
Provider ID # Submit

Provider Search Results

#	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	All
				</																							

- When prompted, enter the date you met with the client to review or update information. Select **Set New Back Date**. If the date you met with the client is today, you can select **Current System Date**.

Back Date Mode ✕

The current System Date is set to:
12/21/2018 10:18:41 AM

If you would like to use a different date, please select one below:

Back Date 12 / 21 / 2018 12 ▾ : 00 ▾ : 00 ▾ AM ▾

REVIEW AND UPDATE CLIENT RECORD

Check the client's profile for any basic information that needs to be updated.

- Review the client summary.

Client Information		Service Transactions	
Summary	Assessments	Client Profile	Households
Entry / Exit	Case Managers	Case Plans	ROI
Added to the system 01/31/2019 03:58 PM			
Name	Test, Care Coordinator	Gender	Male
Date of Birth	01/07/1977 (Age 42)	Primary Race	Asian (HUD)
Social Security	685-13-1136	Secondary Race	
		U.S. Military Veteran?	Yes (HUD)

- If any information here needs to be added or corrected, click on the Client Profile tab to update.
 - To correct or add Name, SSN, or Veteran Status click the **edit pencil** next to Client Record.

Client Record





































Name	Test, Care Coordinator
Name Data Quality	Full Name Reported
Alias	SHARED
Social Security	685-13-1136
SSN Data Quality	Full SSN Reported (HUD)
U.S. Military Veteran?	Yes (HUD)
Client ID	677
Age	42

- If Date of Birth is not correct, contact an outreach worker or [appropriate assessor](#) to make this correction.

CHECK CLIENT PRIORITY LIST STATUS

1. Click on the Client Information tab.
 - a. Click Entry/Exit tab.
 - b. Review list of Entries to see if client has an active entry to the Priority List provider
 - i. You may need to scroll through using the **next button** to see all entries
 - ii. A client is on the Priority List if they have an open (no exit date) entry to the Priority List Provider.
 - iii. A client is NOT on the Priority List if there is no entry to a Priority List Provider OR if all entries have an exit date. If there is an exit date, this means the client was on the Priority List but has been removed.
 - c. If client is not on the Priority List:
 - i. Connect client with an [appropriate assessor](#) to have a CES assessment completed.
 - ii. Continue to the **Review CES History** section to review any previous CES History and update information if needed.








Note: Clients can be reactivated and added back to the Priority List by an assessor if they are still eligible for CES and their assessment is still considered current. If not, a new assessment will need to be completed. Clients can only be added to or reactivated on the Priority List by an assessor

Client Information		Service Transactions						
Summary	Assessments	Client Profile	Households	Entry / Exit	Case Managers	Case Plans	ROI	
 Reminder: Household members must be established on Households tab before creating Entry / Exits								
Entry / Exit								
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count		
 Simpson Single-ES-HCC-<><>-Women's Shelter (4085)	Basic	 10/30/2017	 11/10/2017					
 Simpson Single-ES-HCC-<><>-Women's Shelter (4085)	Basic	 10/05/2017	 10/29/2017					
 Simpson Single-ES-HCC-<><>-Women's Shelter (4085)	Basic	 09/24/2017	 10/04/2017					
 Hennepin Singles Coordinated Entry Assessment (4314)	Basic	 09/20/2017						
 Simpson Single-ES-HCC-<><>-Women's Shelter (4085)	Basic	 09/14/2017	 09/23/2017					

REVIEW CES REFERRAL HISTORY – CLIENTS **NOT** CURRENTLY ON A PRIORITY LIST

Note: Only complete one follow-up review per day. If you need to edit the information in the same day, update the existing review instead of creating an additional review.





1. Click on the **Follow-up icon**.

Entry / Exit							
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
 Hennepin Singles Coordinated Entry Assessment (4314)	Basic	 01/17/2019	 04/10/2019				
Add Entry / Exit		Showing 1-1 of 1					

2. Click **Add Follow-Up Review**
3. Select Follow-up Review Type: **Update**

Add Follow Up Review - (759) Fischer, Carrie Marie

Follow Up Review Data








Entry / Exit Provider	Hennepin Singles Coordinated Entry Assessment (4314)
Entry / Exit Type	Basic
Follow Up Review Type *	Update 
Review Date *	05 / 01 / 2019   12 : 43 : 41 PM 

4. Click **Save and Continue** to open the assessment.
5. Review the assessment to see referral history information.
6. Continue to [REVIEW AND UPDATE CLIENT'S CES ASSESSMENT](#) to update information

REVIEW CES HOUSING REFERRAL TRACKING – CLIENTS **ON** THE PRIORITY LIST

Note: Only complete one follow-up review per day. If you need to edit the information in the same day, update the existing review instead of creating an additional review.

1. Click on the **Interims icon**.

Entry / Exit							
Program	Type	Project Start Date	Exit Date	Interims	Follow Ups	Client Count	
 Hennepin Singles Coordinated Entry Assessment (4314)	Basic	 12/07/2018					
Add Entry / Exit		Showing 1-1 of 1					

2. Click **Add Interim Review**
3. Select Follow-up Review Type: **Update**

Add Interim Review - (677) Test, Care Coordinator

Interim Review Data

Entry / Exit Provider	Hennepin Singles Coordinated Entry Assessment (4314)
Entry / Exit Type	Basic
Interim Review Type *	Update
Review Date *	05 / 01 / 2019 8 : 31 : 28 PM

4. Click **Save and Continue** to open the assessment
5. Review the Assessment to determine referral status information

Scroll to the Coordinated Entry Event. There are 3 Referral Status options to look for here:

- A. Client has never had a referral
 1. No information has been filled in on the Coordinated Entry Event

CES Housing Referral Status

Coordinated Entry Event

Start Date*	Event*	Location of Crisis Housing or Permanent Housing Referral	Housing Provider Contact Name	Date Referral Acknowledged	Referral Result	Date of Result
Add						

2. Continue working with client to identify other housing options other than CES. Housing through CES is not guaranteed.
3. Continue to [REVIEW AND UPDATE CLIENT'S CES ASSESSMENT](#) to update information

- B. Client has a current open referral
 1. Coordinated Entry Event indicates a referral was made, but no Referral Result or Date of Result have been completed

CES Housing Referral Status

Coordinated Entry Event

Start Date*	Event*	Location of Crisis Housing or Permanent Housing Referral	Housing Provider Contact Name	Date Referral Acknowledged	Referral Result	Date of Result
03/01/2022	Referral to RRH project resource opening	CCSPM Hsg F RRH HCC HUD ESG Mpls Singles (3186)				
Add						

Showing 1-1 of 1

2. Help client connect with Housing provider using the contact information listed
3. Continue to [REVIEW AND UPDATE CLIENT'S CES ASSESSMENT](#) to update information

- C. Client has one or more closed referrals, but no open referrals

CES Housing Referral Status

Coordinated Entry Event							
	Start Date*	Event*	Location of Crisis Housing or Permanent Housing Referral	Housing Provider Contact Name	Date Referral Acknowledged	Referral Result	Date of Result
	03/01/2022	Referral to RRH project resource opening	CCSPM Hsg F RRH HCC HUD ESG Mpls Singles (3186)		03/01/2022	Unsuccessful referral: client rejected	03/15/2022

Add Showing 1-1 of 1

1. Start date is filled out and Referral Result or Date of Result are completed
2. Continue working with client to identify other housing options other than CES. Housing through CES is not guaranteed.
3. Continue to [REVIEW AND UPDATE CLIENT'S CES ASSESSMENT](#) to update information

ASSESSMENT REVIEW

1. Determine whether the client's [assessment is current](#)

SECTION 1: Assessor Information

Assessor Information - Step 2							
	Date of Assessment*	Location Completed	Assessor's Name	Assessor's Organization	Assessor's Phone	Assessor's Email	End Date
	12/07/2018	HLC	Bobby Ry	Salvation Army	612-555-3491	bobby@salvationarmy.org	

Add Showing 1-1 of 1

- a. If yes, continue to [REVIEW AND UPDATE CLIENT'S CES ASSESSMENT](#).
- b. If no, connect client with an [appropriate assessor](#) to have a new assessment completed

REVIEW AND UPDATE CLIENT'S CES ASSESSMENT

REVIEW AND UPDATE INCOME

2. Review the client's income sources and amount. Update to reflect current income situation.
 1. Click the magnifying glass to review or update income information

Monthly Household Income				
	Date of Assessment*	Current or Expected?	Source of Income	Monthly Amount
	12/07/2018	Current Income	General Assistance (HUD)	US\$203.00

Add Showing 1-1 of 1

If "Yes" to Income from Any Source, please enter the total current household monthly income below

Total Household Monthly Income: G

Be sure to update the Total Monthly Income amount if updates are made to the income sub-assessment.

2. Create a new line if adding a new source or amount. If the existing income source or amount is no longer correct, put an end date on it and click, **Save and Add Another**. Be sure to end the previous record THE DAY BEFORE you start a new record. NOTE: The Single and Family Assessments use a slightly different income sub-assessment.
 - a. Single:

Edit Recordset - (677) Test, Care Coordinator

Monthly Household Income

Date of Assessment * 12 / 07 / 2018

Current or Expected? Current Income

Source of Income General Assistance (HUD)

Monthly Amount 203

End Date 02 / 06 / 2019

Print Recordset Save Save and Add Another Cancel

b. Family:

Edit Recordset - (677) Test, Care Coordinator

Household Income Summary:

***Income start date is the date that you identify the income in conversation.*

Start Date * 12 / 17 / 2018

HH Member: Self

Income Type: Earned Income (HUD)

Employer/Note:

Employer Type (EI): Part Time

Hours per week (EI): 10

Payday: Friday

Freq: Bi-Monthly

Amount/check: \$ 150

Monthly total: \$ 325

Verified? Yes

End Date 02 / 06 / 2019

Print Recordset Save Save and Add Another Cancel

ADD CURRENT CASE MANAGERS

Care Coordinators may want to update the client’s assessment to show themselves or others as a Current Case Manager who can assist a client specifically with CES navigation or process. Please only indicate someone here to is actively working as a case manager with your client.

1. Add a Current Case Manager
 1. Click the **Add** button

Please list all providers/case managers who client is currently involved with (ex. County Financial Worker, County Services, Veteran Services, Vocation Services, Other).

Current Case Managers

Provider Type	Provider County	Agency Name
Add		

2. Complete as much information in the Current Case Manager sub-assessment as possible.
3. Click on **Save**.

Current Case Managers

Date of Assessment *	02 / 06 / 2019
Provider Type	Vocational Services
Provider County	Hennepin County
Agency Name	World's Best Vocational Services
Worker Name	Betty Norris
Worker Email	betty@wbvs.com
Worker Phone	612.555.2461
Worker Notes	Meets with the client M and Th
End Date	

4. Add an End Date for any Case Managers listed with which the client is no longer working.
5. Continue to [RECORD CURRENT LIVING SITUATION](#)

RECORD CURRENT LIVING SITUATION

Each time you meet with a client, record a Current Living Situation. This will help understand whether a client is staying in shelter or is unsheltered, as well as who they are connecting with regularly for services.

1. Add Current Living Situation
2. Click the **Add** button

HOUSING INFORMATION

Current Living Situation

Start Date *	End Date	Current Living Situation	Is client going to have to leave their current living situation within 14 days?
01/01/2022		Place not meant for habitation (HUD)	

Showing 1-1 of 1

3. Record at least Start Date, Information Date, Current Living Situation. Optional to record Location Details.

Edit Recordset - (1) Phoenix, The

Current Living Situation

Start Date *	03 / 01 / 2022
End Date	03 / 01 / 2022
<i>Ensure that Information Date matches Start Date above.</i>	
Information Date *	03 / 01 / 2022
Location details	Encampment A
Current Living Situation	Place not meant for habitation (HUD)
If "Other", Specify	



4. If client is on the priority list, continue to [REVIEW AND UPDATE CLIENT CHOICE QUESTIONS](#)
5. If client is NOT on the Priority List or requires a reassessment with an appropriate assessor, skip to [ADD CARE COORDINATOR NOTES – OPTIONAL](#)

REVIEW AND UPDATE CLIENT CHOICE QUESTIONS

There are several client choice questions related to the type of housing opportunities a person might be interested in. Review these with the client. If any of the client’s needs or preferences have changed, please update. You do not need to delete previous answers. (Note: The Singles and Family choice questions are slightly different.)

Sections that can be reviewed and updated include:

- **Client Choice**
 - General Questions
 - Location Questions
 - Culturally-specific Questions
- **Permanent Supportive Housing Preferences:** IF client has been identified as eligible and interested in Permanent Housing, review the Permanent Supportive Housing Preference section and update as necessary

Note: Do NOT change the Housing Type Eligibility or Housing Type Preference sections. If the client indicates a change in eligibility or housing type preference, refer them to an [appropriate assessor](#)

ADD CARE COORDINATOR NOTES – OPTIONAL

If there is any additional information that you feel would be helpful for Priority List Managers or Housing Providers to know about your client, you can put that information here. Be sure NOT to include protected health information or other private information that should not be shared statewide as this section is visible to all housing providers in HMIS as well as many other providers such as shelters, outreach, and supportive services programs.

1. Add Care Coordinator Notes







The following are prompts to assist in noting information about the client in the subassessment below:

- *Do you plan on going to CD treatment, an IRTS, or some other short-term setting before you are housed?
- *Do you have any preferences for a provider or agency you would like to work with?
- *Any agencies you would rather not work with?
- *Are you considering any other housing options?
- *Are you currently involved with any specialty courts (ie. HOMES)?

H CES Care Coordinator's Notes

Date of Assessment	Notes
Add	

1. Use date you’re meeting with the client. Add the note. Click Save. Do not put an end date on the note until it is no longer relevant.


CES Care Coordinator's Notes	
Date of Assessment	02 / 07 / 2019    G
Notes	<div style="border: 1px solid gray; height: 60px;"></div> G
End Date	/ /    G
<input type="button" value="Save"/> <input type="button" value="Save and Add Another"/> <input type="button" value="Cancel"/>	

Note: If no update to the assessment is needed, record a Care Coordinator Note, "Date Reviewed, No update needed"

REVIEW AND UPDATE CONTACT INFORMATION

Updating contact information for the client is one of the most important updates you can make. If a housing opportunity becomes available, it is important that the client be reachable.

1. Review the Contact Information on the assessment. If any of the client's information or preferences have changed, please update. No need to delete previous answers.

Preferred Contact Method	Text  G
Email where you can be reached or where a message can be sent	theguy@gmail.com G
Phone number where you can be reached or where a message can be left	612.555.6471 G
Mailing address where you can reliably receive mail	1010 Currie Ave, Minneapolis, MN G
If Physical Location is preferred contact method, indicate location:	Opportunity Center G
Alternative Contact #1 Name	Tanya Ryan G
Alternative Contact #1 Relationship	Friend G
Alternative Contact #1 Email	tanyar@gmail.com G
Alternative Contact #1 Phone	612.555.1871 G
Alternative Contact #2 Name	Sophie Monroe G
Alternative Contact #2 Relationship	Mother G
Alternative Contact #2 Email	smonroe@gmail.com G
Alternative Contact #2 Phone	612.555.8711 X G

When finished with all assessment updates, click Save and Exit. Then click Exit to close the review.

ADD YOURSELF AS A CASE MANAGER (OPTIONAL)

If you are working with this client as and want to identify yourself as a case manager you can do so in HMIS. This will help other people working with this client know that you may be able to help contact the client or provide additional services for this client if needed. You can also identify others as case managers if the client tells you they have other people working with them that they would like to share in their HMIS record. This is shared with all providers in HMIS, not just those doing CES. Please limit this to people who are actively working with this client on housing case management.

1. Click on the **Client Information** tab.
2. Select the **Case Managers** tab.
3. Click on **Add Case Manager**

The screenshot shows the 'Client Information' tab with the 'Case Managers' sub-tab selected. Below the sub-tab is a table with columns for Name, Provider, Phone Number, Start Date, and End Date. The table currently shows 'No matches.' A red box highlights the 'Add Case Manager' button located below the table.

- a. Option 1: Add yourself as a Case Manager
 - i. Select **Me** to autofill with your user information

The screenshot shows the 'Add Case Manager' form with the 'Me' radio button selected. The form fields are pre-filled with the following information:

- Type ***: ServicePoint User **Me** Other
- Name ***: Teresa Howard
- Title**: Exp. 7.15 Principal IT Specialist, f
- Phone Number**: 612-543-2013
- Email Address**: Teresa.Howard@hennepin.us
- Provider ***: Hennepin Care Coordination (5302) [Search] [My Provider] [Clear]
- Start Date ***: 01 / 31 / 2019
- End Date**: [] / [] / []

The 'Add Case Manager' button is highlighted with a red box.

- b. Option 2: Add another person as a Case Manager
 - i. Select **Other** and type in the Case Manager information

The screenshot shows the 'Add Case Manager' form with the 'Other' radio button selected. The form fields are empty:

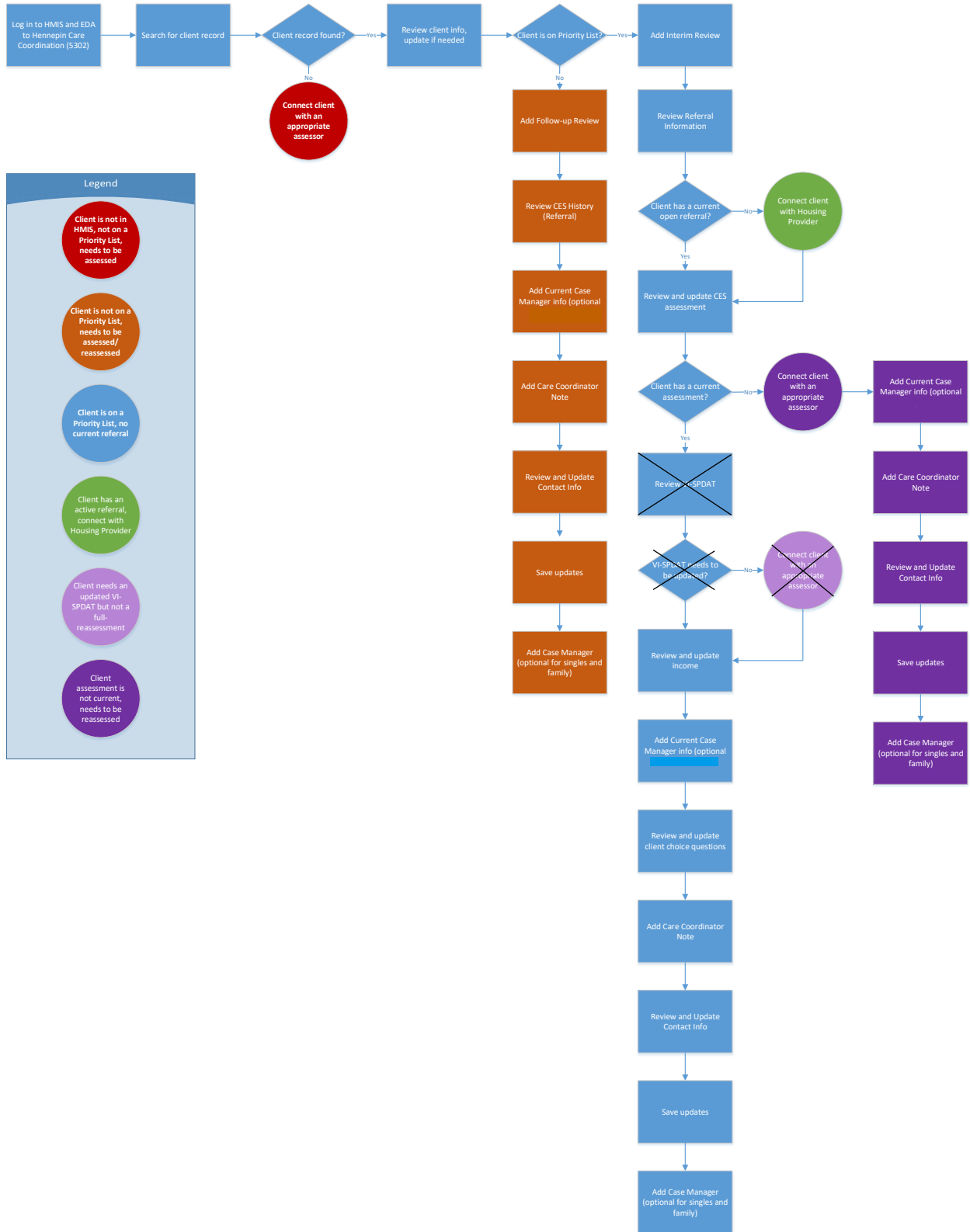
- Type ***: ServicePoint User Me **Other**
- Name ***: []
- Title**: []
- Phone Number**: []
- Email Address**: []

- c. Leave **End Date** blank until the case manager identified is no longer working with this client or is no longer a good contact.
- d. Click Add Case Manager to save

RESOURCES

- Coordinated Entry Resources
 - CES Assessment or Process Questions
 - <https://www.hennepin.us/coordinated-entry>
 - CES.Hennepin@Hennepin.us
- Hennepin County Local HMIS System Administrator
 - Care Coordinator workflow-specific questions
 - Teresa.howard@Hennepin.us
- Institute for Community Alliances
 - General HMIS questions including data entry or reporting
 - HMIS Helpdesk Mnhmis@icalliances.org
 - www.hmismn.org

CARE COORDINATOR WORKFLOW DIAGRAM



Legend

- Client is not in HMIS, not on a Priority List, needs to be assessed
- Client is not on a Priority List, needs to be assessed/ reassessed
- Client is on a Priority List, no current referral
- Client has an active referral, connect with Housing Provider
- Client needs an updated Vi-SPDAT but not a full-reassessment
- Client assessment is not current, needs to be reassessed