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	• Connect user with an appropriate assessor to have an assessment completed
Client has no CES Assessment	• Connect user with an appropriate assessor to have an assessment completed
Client's CES Assessment is not current	• Connect user with an appropriate assessor to have an assessment completed
Client has a CES Assessment but no current referral to housing	• 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	• 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.

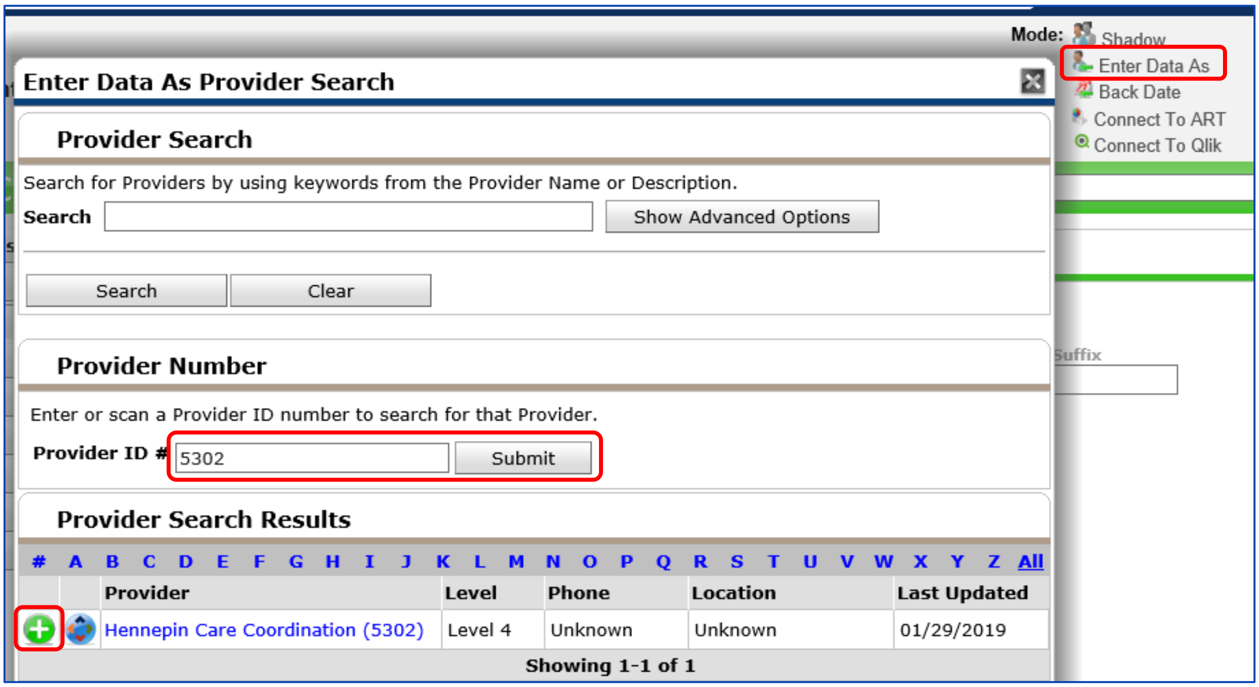
- Singles:
    - A client's most recent assessment is over one year old
    - A client has encountered a significant life change or event, which may directly impact and change the type of housing intervention they receive
    - A single adult or youth becomes pregnant or parenting needs re-assessment 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

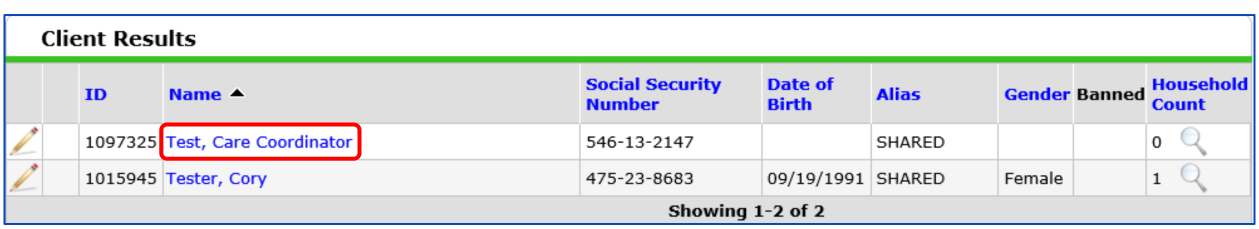
LOG IN TO HMIS AND EDA TO CES CARE COORDINATOR PROVIDER

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



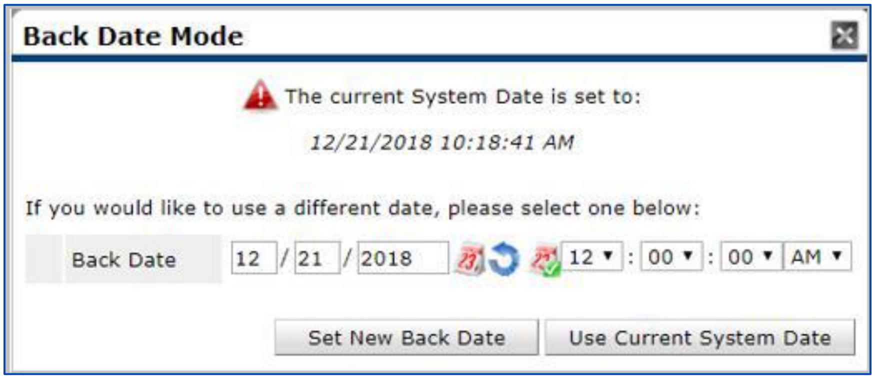
SEARCH FOR CLIENT RECORD

1. On the ClientPoint – Client Search screen,
   a. Search for client 3 different ways
   b. If a matching client is found, click on that client to open record



NOTE: If no matches found, connect client with an outreach worker or appropriate assessor to have an HMIS record created.

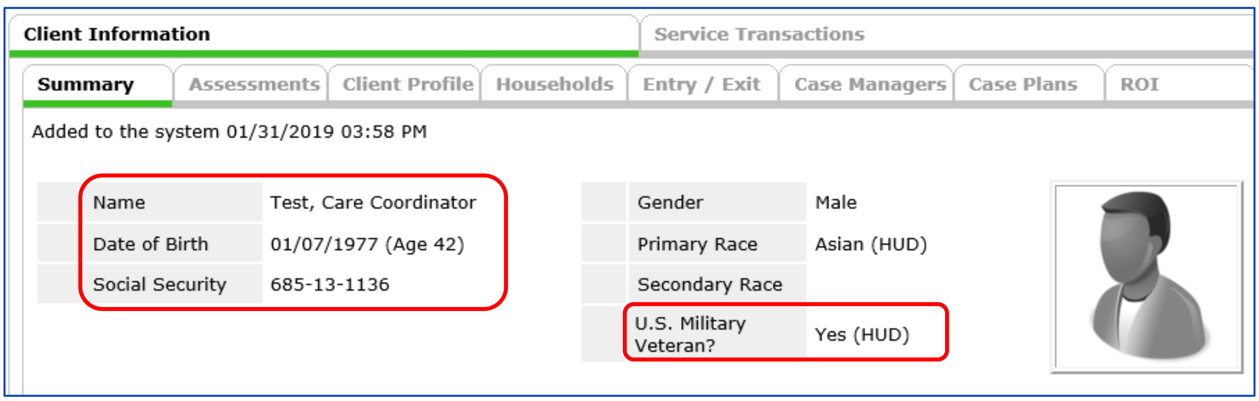
2. When prompted, enter the date you met with the client to review or update information. Select **Set New Back Date**. If the date you met with the client is today, you can select **Current System Date**.



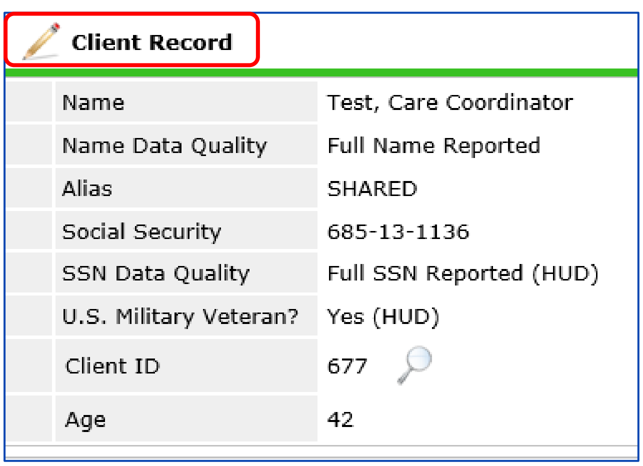
REVIEW AND UPDATE CLIENT RECORD

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

1. Review the client summary.



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

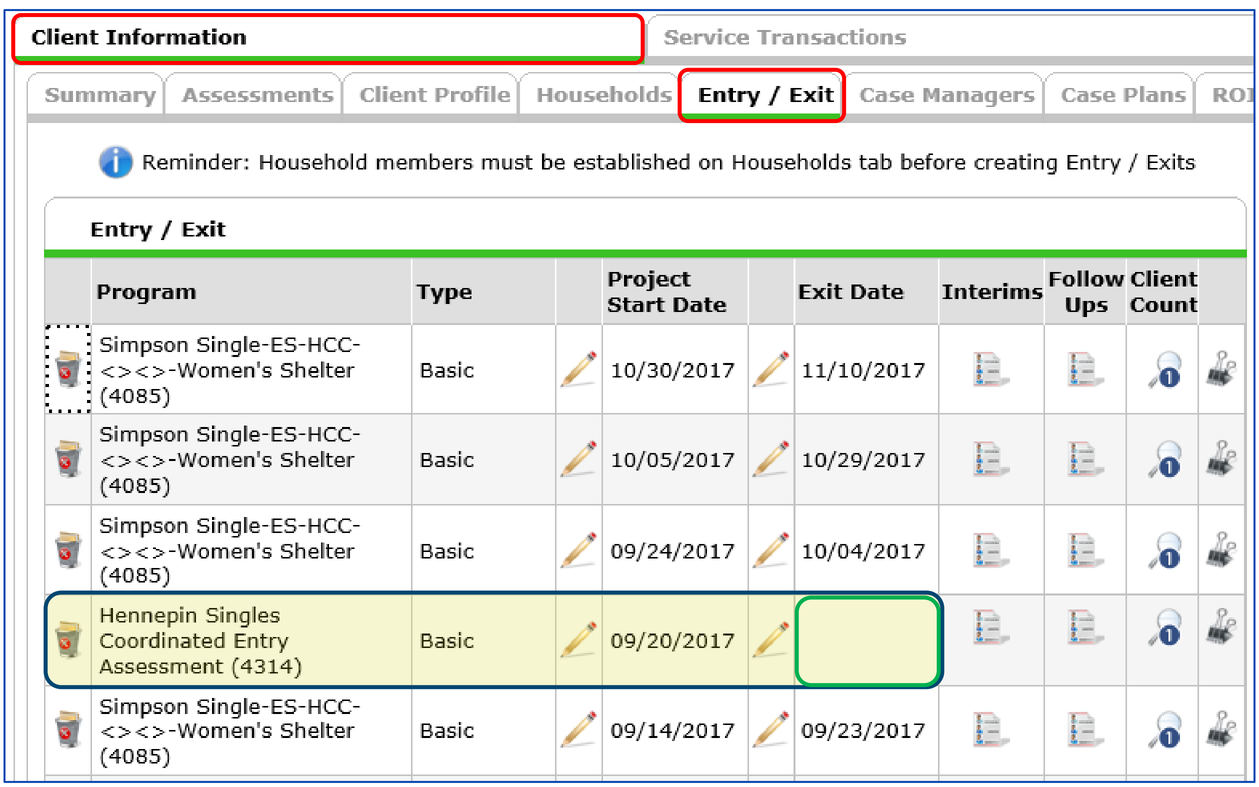


   b. If Date of Birth is not correct, contact an outreach worker or appropriate assessor to make this correction.

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 of 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.

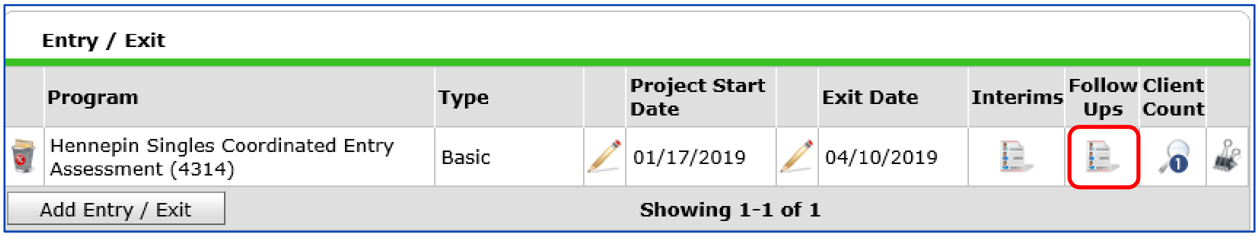
Note: Clients can be reactivated and added back to the Priority List by an assessor if they are still eligible for CES and their assessment is still considered current. If not, a new assessment will need to be completed. Clients can only be added to or reactivated on the Priority List by an assessor



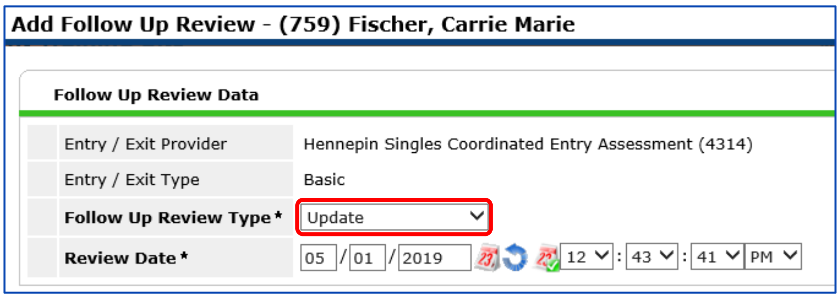
REVIEW CES REFERRAL HISTORY – CLIENTS NOT CURRENTLY ON A PRIORITY LIST

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**.



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

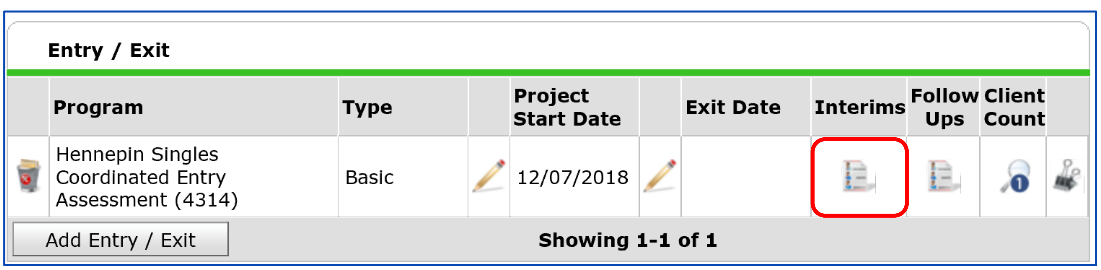


4. Click **Save and Continue** to open the assessment.
5. Review the assessment to see referral history information.
6. Continue to [REVIEW AND UPDATE CLIENT'S CES ASSESSMENT] to update information

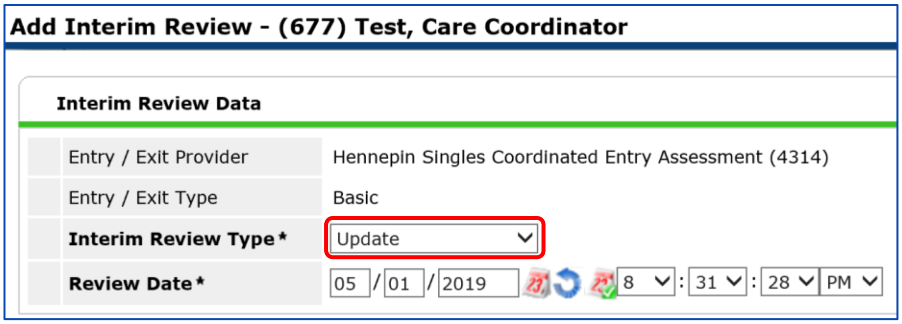
REVIEW CES HOUSING REFERRAL TRACKING – CLIENTS ON THE PRIORITY LIST

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.**



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

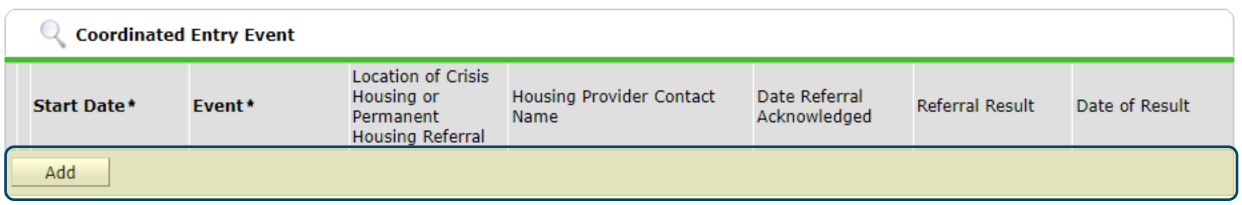


4. Click **Save and Continue** to open the assessment
5. Review the Assessment to determine referral status information

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

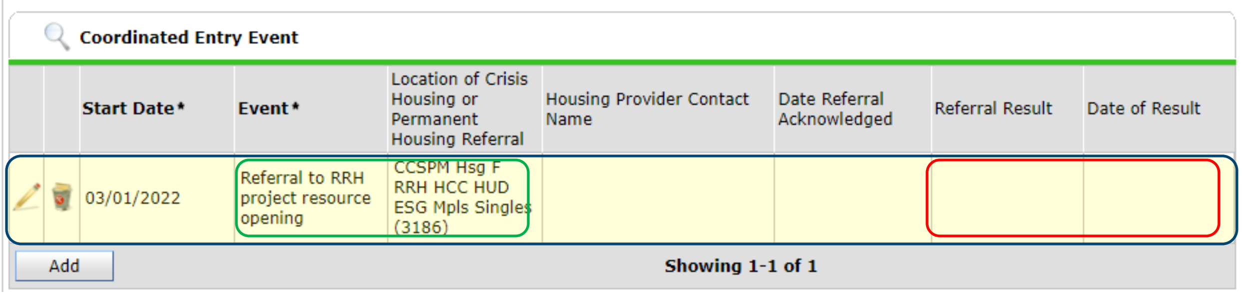
CES Housing Referral Status



    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



    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

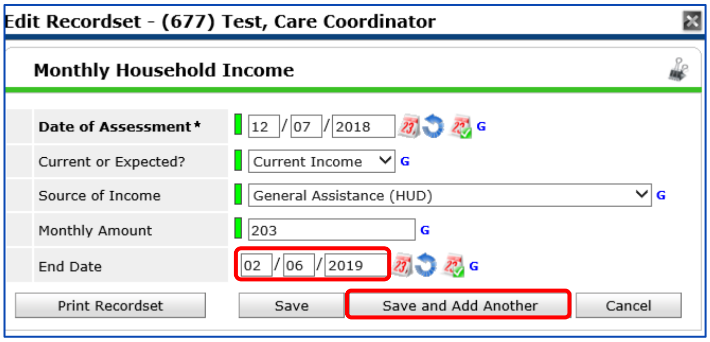
Add **Showing 1-1 of 1**

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

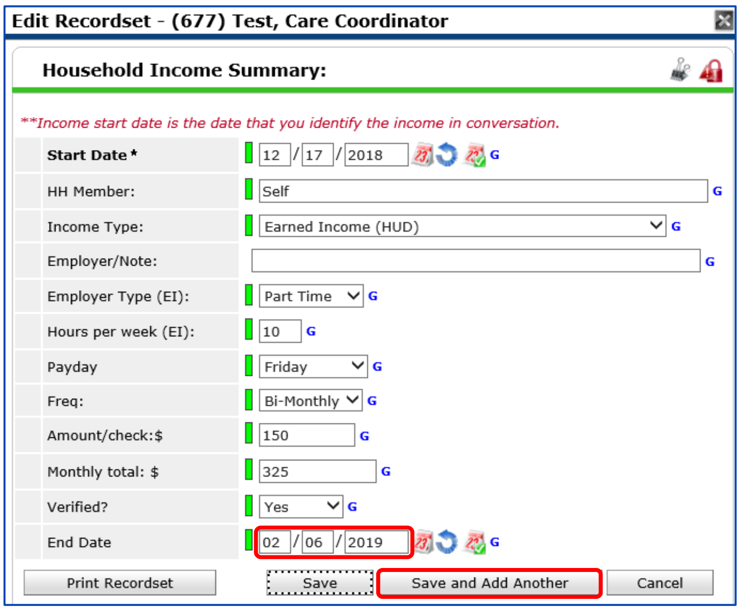
Total Household Monthly Income: 203 G

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:



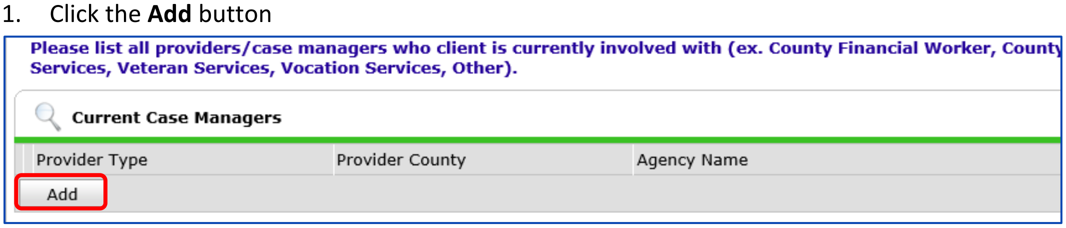
b. Family:



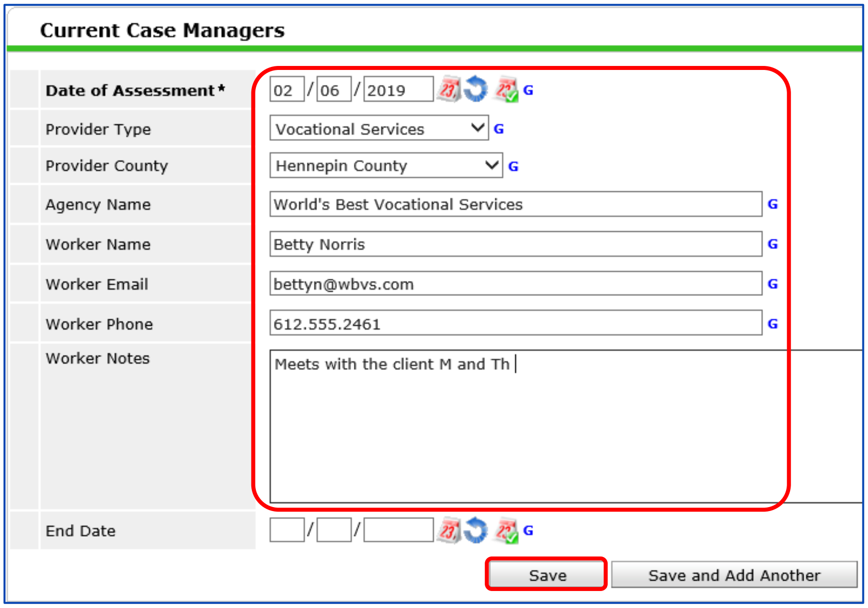
ADD CURRENT CASE MANAGERS

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



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



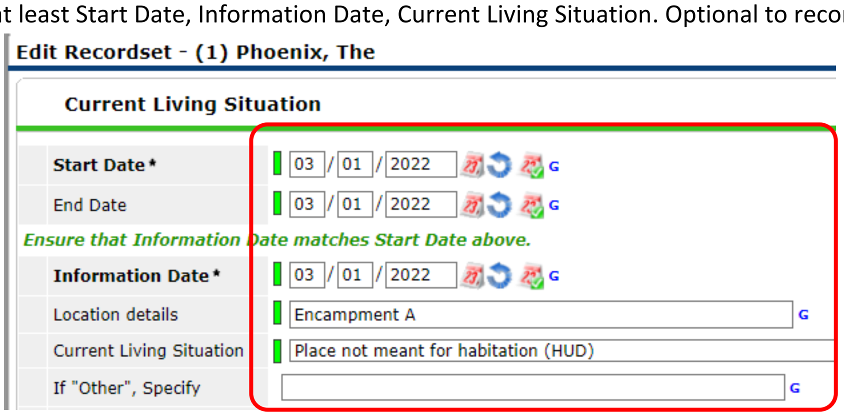
4. Add an End Date for any Case Managers listed with which the client is no longer working.
5. Continue to [RECORD CURRENT LIVING SITUATION](#)

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

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



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:

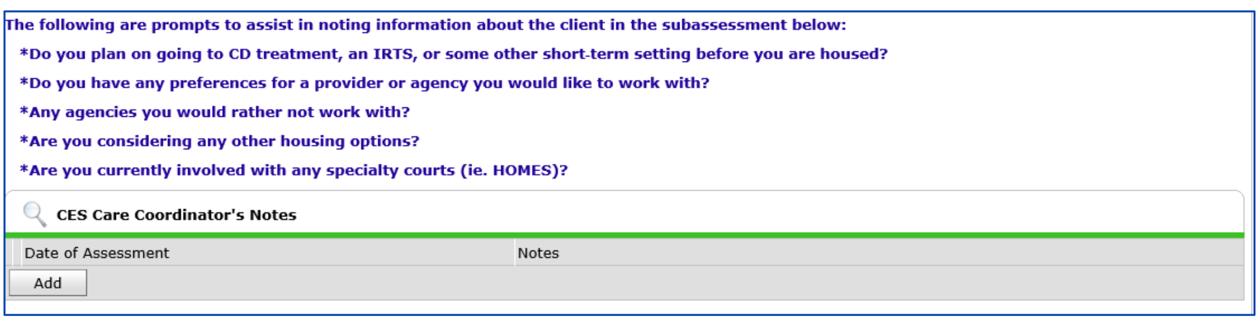
- **Client Choice**
  - General Questions
  - Location Questions
  - Culturally-specific Questions
- **Permanent Supportive Housing Preferences:** IF client has been identified as eligible and interested in Permanent Housing, review the Permanent Supportive Housing Preference section and update as necessary

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

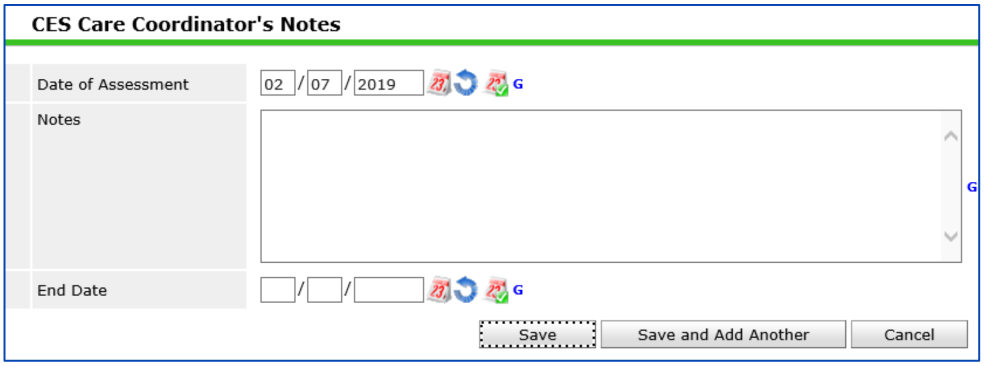
ADD CARE COORDINATOR NOTES – OPTIONAL

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



   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
Notes	
End Date	/ /

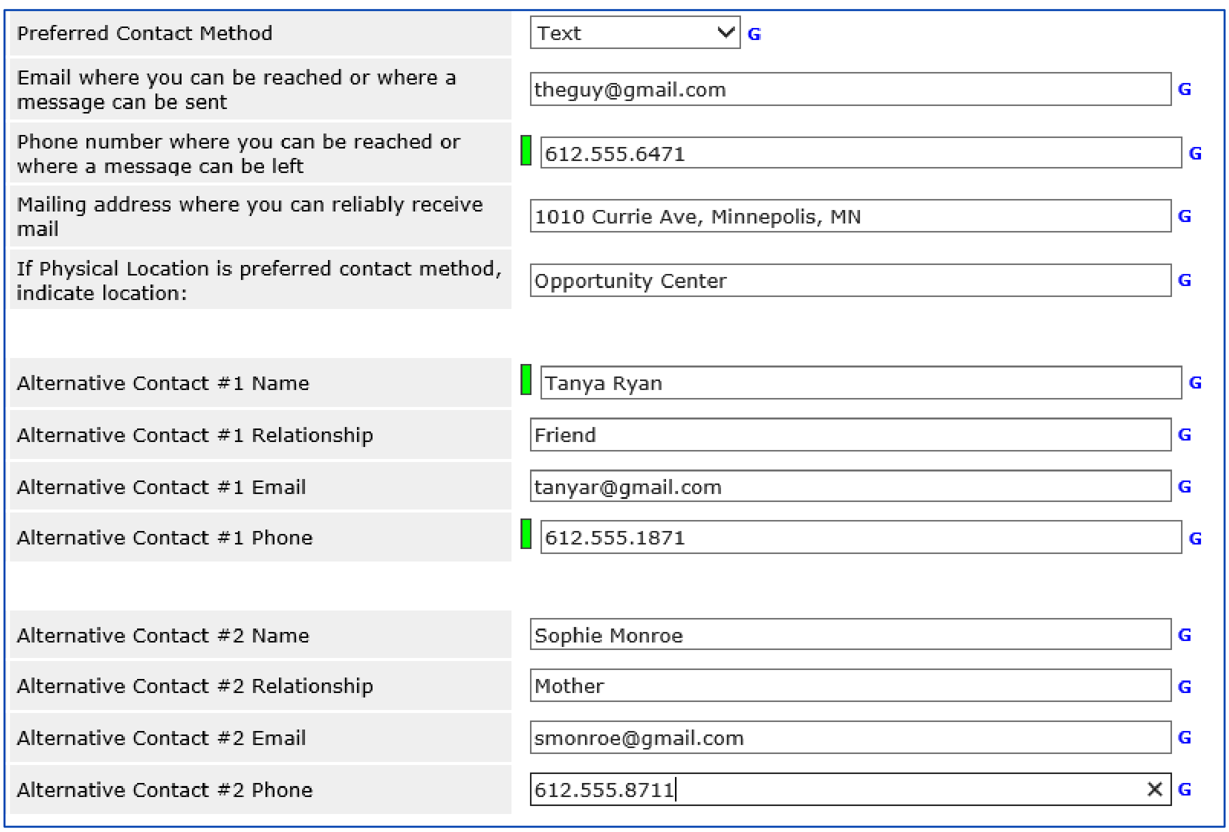
Save | Save and Add Another | Cancel

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.



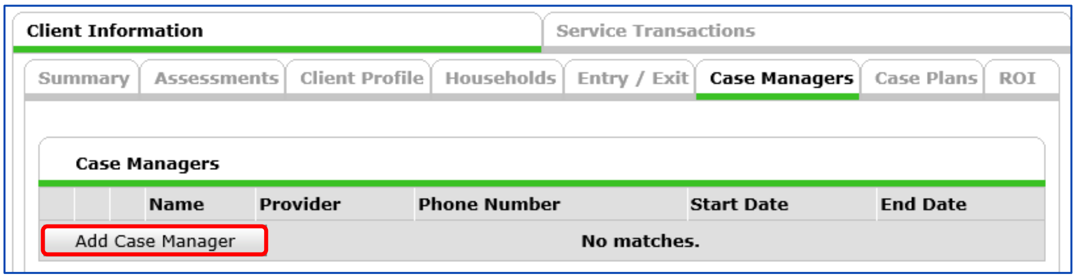
Preferred Contact Method	Text
Email where you can be reached or where a message can be sent	theguy@gmail.com
Phone number where you can be reached or where a message can be left	612.555.6471
Mailing address where you can reliably receive mail	1010 Currie Ave, Minneapolis, MN
If Physical Location is preferred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

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

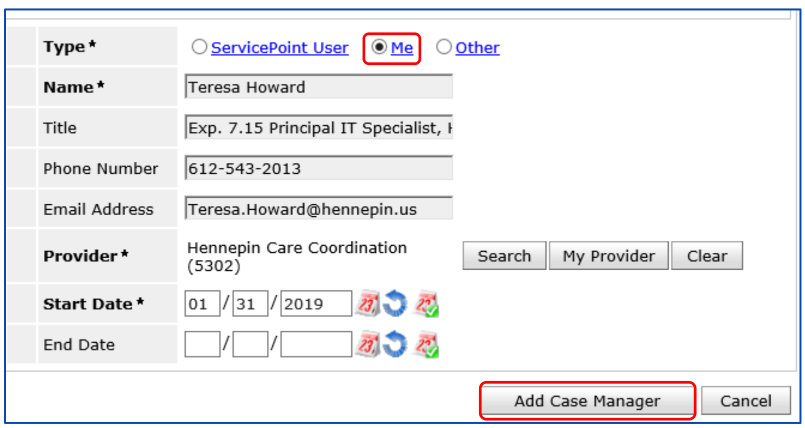
ADD YOURSELF AS A CASE MANAGER (OPTIONAL)

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.

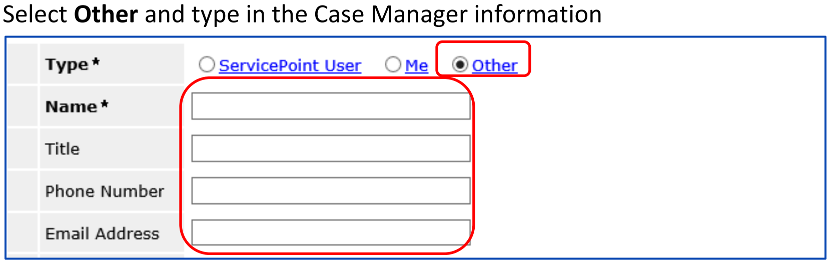
1. Click on the **Client Information** tab.
2. Select the **Case Managers** tab.
3. Click on **Add Case Manager**



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



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



   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 COORDINTOR WORKFLOW DIAGRAM