

HMIS DATA ENTRY GUIDE FOR SINGLE POINT OF ENTRY

Instructions for creating emergency shelter bed reservations for single adult clients in a Single Point of Entry program.

TABLE OF CONTENTS

- Start of Shift2
- Reserve a Shelter Bed3
 - Check Client Record.....3
 - Create a Reservation for the Client4
 - Resolve a Referral from Diversion4
- Appendix A: Create a Community Card5
- Appendix B: Create a New Client Record6
- Appendix C: Document that a Client Could not be Served.....8

START OF SHIFT

Prepare for clients by checking for system alerts and reviewing bed availability.

1. Log in to **Community Services**.
2. Check the **System News** section on your Home Page Dashboard for announcements about system downtime, new data standards, and other important updates.

System News (6)		Agency News (0)
Date	Headline	
10/18/2021	Reminder: Do NOT use the 'Verify and Save Data' button!	
10/15/2021	CoC APR, ESG CAPER, and PATH reports have been updated.	

3. Select **Shelters** from the navigation menu on the left side of the screen.
4. Follow internal procedures for determining and tracking bed availability for the day. Different shelters will have different procedures.
 - a. All night-by-night shelters will reference the total in the **Reservations for Unit List** at the bottom of the unit list. Book the total reservations up to the capacity or overbooking number provided by the shelter.

Reservations for Unit List -			
Arrival Date	Name	Date of Birth	Gender
10/18/2021	10/18/2021	10/18/2021	10/18/2021

Showing 1-20 of 66

- b. Extended-stay shelters may be determined using the **Check Unit Availability** button. From the pop-up use the number in the **Available** column. But may be useful to confirm availability via phone or email.

Unit Lists							
Provider ^	Unit List	Type	Total Units	Used	Available	Overflow	Capacity
Institute for Community Alliances (ICA) (no data entry)	Test shelter	Emergency Shelter	16	0	16	0	0%

- c. For after-hours shifts, call the shelter to confirm accurate bed count.
5. Continue through the shelter provider list until you have confirmed all shelters' availability.
 6. Track changes in availability throughout the shift to prevent double-booking.

RESERVE A SHELTER BED

When reserving a shelter bed for a client, it is important to verify that their information in Community Services is accurate and that the most appropriate destination is selected.

1. Select **Clients** from the navigation menu on the left side of the screen.
2. When a client contacts your program, request the Client ID # from their **Community Card** and enter that under **Client Number**. If they do not have one on hand, ask for personally identifying info and use **Client Search** to find their record.
 - ❖ If at any time there is suspicion of a false identity or impersonation, ask for a secondary form of ID or more personally identifying info.
 - ❖ If the client needs a Community Card, follow the instructions in [Appendix A: Create a Community Card](#).
 - ❖ If you are unable to locate a shared record for the client, follow the instructions in [Appendix B: Create a New Client Record](#) to add them to HMIS.

CHECK CLIENT RECORD

1. Select the **Client Profile** tab and confirm that the **Alias** field contains the word “SHARED”.
 - ❖ If a Date of ROI consent is entered, but there’s no “SHARED” in this field, add it.
2. Review the **Shelter Stays** section on the **Summary** tab to see where the client has stayed previously. This information can help you decide where to reserve a bed for the client.
 - ❖ If there is a shelter stay listed with blank dates, the client already has a reservation. Double-check the unit list in **Shelters** and confirm that is what the client prefers.
3. Check the **Incidents** section to see whether there are any entries from the single adult shelters.
 - ❖ If the client is banned from one of the shelters, do not send them there!
4. Select the **Client Profile** tab and review the answers in the available assessment. Update any information that is no longer accurate, then scroll down to the bottom of the screen and click on **Save**.
 - ❖ If it was never completed, back date to the date of ROI consent before finishing it with the client. The back date can be changed at any time by clicking on **Back Date** in the top right corner of the screen. ICA recommends setting the time to “12:00:00 AM”.
5. Select the **Assessments** tab and confirm the shelter placement assessment is accurate and complete to help figure out where client will be best served.
 - ❖ If the client discloses that they are a sex offender or are not sure whether they meet that definition, check their status on the [Search for Offenders and Fugitives](#) page of the Minnesota Department of Corrections website.

CREATE A RESERVATION FOR THE CLIENT

1. Select **Shelters** from the navigation menu on the left side of the screen.
2. Verify that there are beds available for reserving. Follow internal procedures for tracking availability and communicate with your team members to confirm throughout the shift.
 - a. Continue through available shelter providers until you find a bed suitable for the client.
 - b. For extended-stay shelters, if the open bed is specified top bunk, confirm client is mobile enough.
 - c. Night-by-night beds are assigned at check-in, specific bunk not guaranteed.
3. From the **Provider** drop-down menu, pick the provider whose shelter inventory you would like to view.
4. Pick the correct unit list from the **Unit List** drop-down menu, then click on the **Submit** button.
5. Select the **View All** option from the **Shelters Dashboard**.
6. Scroll to the bottom and select the **Add Reservation** button.
7. Enter the Client ID # and select **Submit** (or hit enter key). Confirm they do not have an active ban in the **Incidents** section of the **Unit Reservation Data** pop-up. Select **Save**.
8. Provide the client with a shelter information card and/or inform them about the shelter where they have a reservation, including its address, how to claim their bed, and the shelter's rules.
 - ❖ If a client cannot be served for any reason, such as a turn-away or refusal to accept the shelter placement given to them, refer to **Appendix C: Document that a Client Could Not Be Served**.

RESOLVE A REFERRAL FROM DIVERSION

1. On the **Summary** tab of the client record, find the section labelled **Outstanding Incoming Referrals**.
2. Look for the edit pencil next to today's date. Click on it to open the referral.
3. Scroll down to the field **Referral Outcome**.
 - a. Select "Declined" if the client could not be contacted.
 - b. Otherwise, select Accepted.
4. Scroll down to the **Need Status and Outcome** section.
 - a. **Need Status**: "Closed"
 - b. **Outcome of Need**: "Fully Met" if the client was sheltered, or "Not Met" otherwise
 - c. **If Need is Not Met, Reason**: select the best option
5. Click **Save and Exit** to leave the referral page.

APPENDIX A: CREATE A COMMUNITY CARD

Whether a client needs their first ever Community Card or a replacement for a lost card, follow the instructions below to create one in Community Services.

1. Ask the client for an ID, such as a driver's license or state ID, to check the spelling of their name and date of birth.
 - ❖ If the client does not have an ID, they may provide you with their personally identifying information verbally.
2. Select **Clients** from the navigation menu on the left side of the screen.
3. Type the client's information into the **Client Search** boxes, then click on **Search**.
 - ❖ Repeat this step multiple times, using different combinations of information to search for the client. Because client records often have incomplete information, it may be necessary to search with only a few boxes filled out and/or partial spelling of names.
4. Before clicking on a client's name in the **Client Results** table, make sure that the client ID is seven digits long and the word **SHARED** is present in the **Alias** field. You should also verify that the client's **Date of Birth** and **Social Security Number** match.
 - ❖ If you are unable to locate a client, follow the instructions in [Appendix B: Create a New Client Record](#) to add them to the system.
5. Click on the **Client Profile** tab.
6. Check whether the client record has a photo. If there is no picture, follow these steps:
 - ❖ Take a photo of the client and square crop their face.
 - ❖ Select **Change** under the empty portrait.
 - ❖ Click on **Browse** in the **Upload Client Image** pop-up. When the File Explorer window appears, locate the picture file, and double-click on it.
 - ❖ Back in the **Upload Client Image** pop-up, select **Upload**.
7. Click on **Issue ID Card**, then select **Generate ID Cards**.
 - ❖ Check the box that says, **Include Date of Birth**, and then click on **Generate ID Cards** to print the Community Card

Include Date Of Birth

- ❖ If there is an issue with the way that Community Cards are printing out, contact the MN HMIS helpdesk at mnhmis@icalliances.org.
8. A new browser tab will appear. Press **CTRL+P** or click on the **printer icon**, then follow the prompts to print the card. Be sure to select your local card printer from the printer list drop-down.



APPENDIX B: CREATE A NEW CLIENT RECORD

If a client does not have a shared record in HMIS, one should be created for them. In order for you to make and guarantee shelter reservations, the client must agree to share with other providers.

1. Discuss the **HMIS Release of Information** with the client. The client has two options at this point:
 - a. **SHARE:** The client consents to have the info collected about them to be shared through Minnesota’s HMIS with other partner agencies. Move on to step 2.
 - b. **DO NOT SHARE:** The client does not want any info about them shared with any other partner agencies. **Stop** and do not create a client profile because it will only be visible to your team and not any of the shelters or other providers. Inform the client that they must go to the specific shelter and ask for an intake and reservation in person. That profile will be unshared, and they will have to repeat this for each new shelter they enter. Your team can provide no further services.
2. Type the rest of the client’s information into the **Client Search** fields. Enter “SHARED” into the **Alias** field since this client has agreed to share. If they have an alias, add that after “SHARED.”
3. Select **Add New Client With This Information**, then select **Ok** to continue.
 - ❖ This option will be grayed out if you have not already selected **Search**.
4. When prompted by the **Back Date Mode** pop-up, select **Use Current System Date**.
5. From the **Release of Information** section, select **Add ROI**. In the pop-up, use today’s date as **Start Date** and a date with year 2099 as **End Date**. Save when finished.


Release of Information Data	
Provider *	Hennepin-HCC-Adult Shelter Connect (4083)
Release Granted *	Yes
Start Date *	12 / 01 / 2021
End Date *	12 / 01 / 2099
Documentation	Signed Statement from Client
Witness	Staff Name or Initials

Save Release of Information Cancel

6. Select the **Client Profile** tab and fill out the HUD ESG assessment. Critical fields:
 - ❖ **Date of ROI Consent:** enter today’s date
 - ❖ **Enrollment CoC:** Your region
 - ❖ **Relationship to Head of Household:** “Self (Head of Household)”
7. When all available information has been entered, scroll down to the bottom of the screen and click on **Save**.

8. Attach a digital copy of the client's HMIS Release of Information to their client record. At the bottom of the **Client Profile** tab is a section titled **File Attachments**. Follow these steps to upload an HMIS ROI there:
 - a. Click on **Add New File Attachment**.



File Attachments					
		Date Added ▼	Name	Description	Type Provider
			01/26/2017	HMIS-ROI_10-01-16.pdf	pdf Institute for Community A
Add New File Attachment 					

- b. Click on **Browse** in the **Upload Attachment** pop-up. When the File Explorer window appears, locate the HMIS ROI file and double-click on it.
- c. Back in the **Upload Attachment** pop-up, select **Upload**.

APPENDIX C: DOCUMENT THAT A CLIENT COULD NOT BE SERVED

If a client is not booked a reservation, then document that outcome using a service transaction. These instructions assume you are already looking at the client's record.

1. Select the **Service Transactions** tab, then click on **Add Need**.
2. In the **Need Information** section, make the following selections:
 - a. **Provider**: your Single Point of Entry program
 - b. **Need**: "Emergency Shelter (BH-1800)"
 - c. **Date of Need**: default
 - d. **Need Status**: "Closed"
 - e. **Outcome of Need**: "Not Met"
 - f. **If Need is Not Met, Reason**: choose most accurate option
 - "Client Not Eligible": client banned from available shelter(s)
 - "Client Refused Service": client eligible but refused reservation at available shelter(s)
 - "No beds available, client turned away": all reservations for their preferred gender beds have been filled
3. If you selected **Client Refused Service** as the reason the client's need was not met, note which shelter the client did not want to be placed at.
4. When all fields have been filled out, click on **Save & Exit**.