



HENNEPIN COUNTY
MINNESOTA



Streets to Housing HMIS Training

July 21, 2022

Homeless to Housing HMIS Case Manager Training

- Agenda
 - Street Outreach and HMIS
 - Logging in and selecting the right provider
 - STH and CES
 - Streets to Housing HMIS Set-up
 - HMIS Workflow
 - Live Demo
 - Reporting
 - Questions

*Will be recorded for future reference

Streets to Housing and HMIS

- When should folks start using HMIS?
- How often should HMIS updates be done
- Current living situation and location details
- How often and to whom should reports be sent (if any)

Quick Links and Navigation Tips

Logging in – Home Screen

WellSky | Community Services

Minnesota

Hennepin-SSO-HCC-HHS-PATH-HAA Supportive Services Only

October 13, 2021

Mode:

- Enter Data As
- Back Date
- Connect To ART

Teresa Howard
System Admin I

This indicates your "Home Provider"
It does not change.

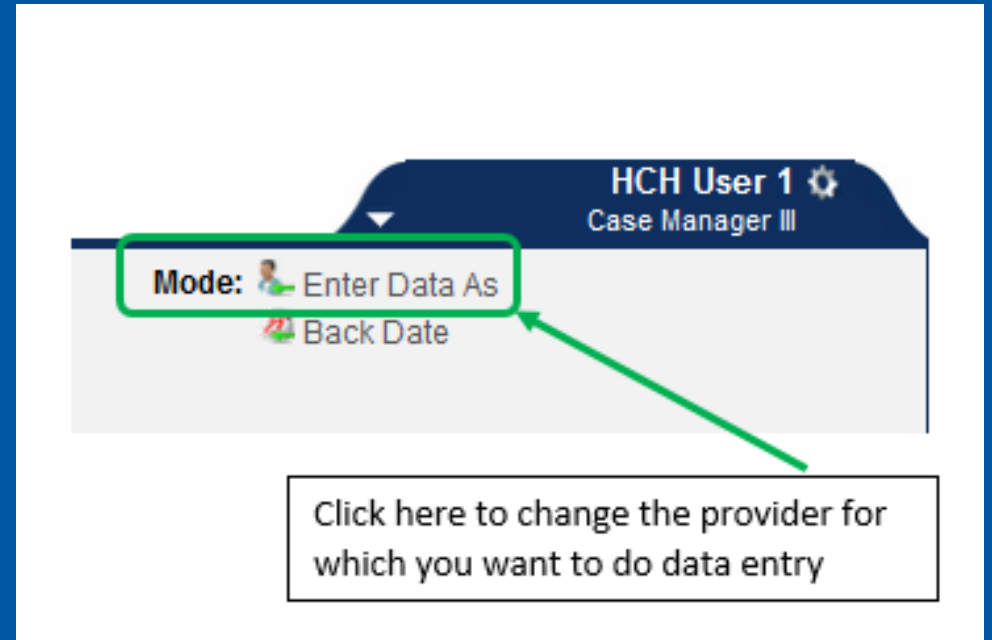
This is your user name and license type

- Users "Home Provider" is not the same as your Streets to Housing provider

Selecting the Right Provider

Changing roles in HMIS requires changing providers

- This is done by using EDA mode
- EDA mode allows you to do data entry into a provider different than your “Home Provider”
- Security and visibility settings are tied to a certain provider so be sure you’re selecting the right one every time
- Select STH or CES as appropriate



Client Summary Navigation

- Summary Page – easily navigate to:
 - Program Entries/Services
 - See where a client is/has been receiving services
 - Open to edit existing entry or add an interim update
- Notes about client
 - View or add notes for case management
 - Shared only with your own agency

Households

ID	Type	Head of Household	Relationship
<input type="button" value="Search Existing Households"/> <input type="button" value="Start New Household"/>			

Entry/Exits

Program	Type	Entry Date	Exit Date
zz-HCC Test Provider - Case Management	Basic	10/01/2021	

Showing 1-1 of 1

Goal

Classification	Type	Date Added	Notes
Legal	Increase understanding of legal situation	10/11/2021	
Chemical Dependency and Mental Health Treatment	Obtain an evaluation (mental health, substance abuse, or dual diagnosis)	10/11/2021	
Economic	Obtain access to benefits	09/29/2021	
Stability and Sufficiency	Obtain public medical benefits	09/29/2021	

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Case Managers

Name	Provider	Phone Number
Teresa Howard	zz-HCC Test Provider - Case Management	612-543-2013

Showing 1-1 of 1

Services

Start Date	End Date	Provider
<input type="button" value="Add Service"/> <input type="button" value="Add Multiple Services"/> No matches.		

Release of Information

Provider	Permission	Start Date	End Date
<input type="button" value="Add ROI"/> No matches.			

Notes about client

Client notes	Start Date*	End Date
Notes about client test	10/11/2021	

Showing 1-1 of 1

Workflow Summaries

Streets to Housing and CES

- Most questions on the Streets to Housing assessments used are also on the CES assessment.
- You can choose to do either assessment first. If you know they will need a CES assessment, it may be easier to do the CES assessment first.
- Make sure you're in the right EDA to create the CES entry, otherwise the client will not be placed on the CES Priority List.
- See "Tips for Clients Enrolled in Multiple Projects" handout for more details.

ESG Assessment

- Purpose:

- Collect basic required information that will be used to report on who is served in the program.

- How to complete

- Clients who go through the ASC or stay in shelter likely will have already had this assessment collected.
- If client is already in HMIS, simply review and update as needed at program entry to reflect STH entry date

- Information collected:

- Demographic information
- Homeless history and status
- Prior Living Situation series
- Client location
- Health insurance, Disability, Income and Non-cash benefits information (optional)
- Move-in date: **Do not edit this information.**

Be sure information matches what is true at STH program entry. Especially the Homeless history and status, Prior Living Situation, and Client Location

Case Manager Assessment

- Purpose:
 - Collect information that will help speed their entry to permanent housing
- Information collected*:
 - Current Living Situation: complete at each contact
 - Vital documents: update as needed. Upload documents when possible.
 - Contact Information: update as needed
 - Housing preferences/CES Updates: update as needed

*these fields are also collected at CES assessment and may not need to be completed at STH entry

Live Demonstration

<https://minnesota.servicept.com>

Program Start Workflow Summary - HMIS

1. EDA to STH team provider
2. Search for client
3. Create program entry
 1. Review and Update ESG Assessment to make sure all Universal Data elements are complete. Additional data elements optional (income, non-cash benefits, health insurance, and disability type)
 2. Complete CM Assessment
4. Update Case Manager Tab (if needed)
 1. Remove any CMs no longer working with the client
 2. Add any new CMs you know are currently working with the client

Program Update Workflow Summary - HMIS

1. EDA to STH provider
2. Search for client
3. Locate open program entry
4. Complete any required missing Entry information
 1. Edit open Entry
 2. Select ESG assessment and complete additional entry information if not initially collected
5. Create Interim – Update information changed since entry
 1. Update CM Assessment
 2. Update ESG Assessment (optional)
6. Update Case Managers Tab (if changed)

Program Exit Workflow Summary - HMIS

1. EDA to STH provider
2. Search for client
3. Locate program entry
4. Create Exit
 1. Record exit date and destination
 2. Record CLS (and location details)
 3. Update Contact Info and Documents in CM Assessment
 4. Update ESG measures (optional)

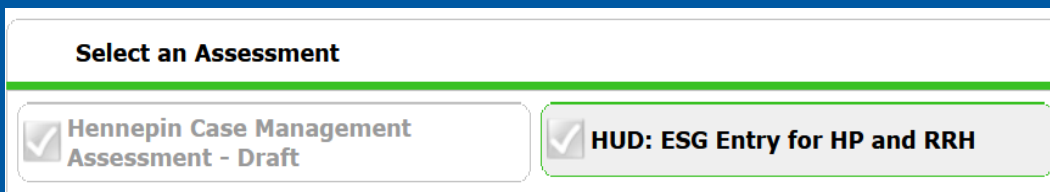
Program Entry

Program Start Workflow - HMIS

1. EDA to STH Provider
2. Create STH program entry
 - a. Type: Basic

3. Complete or review and update ESG Assessment

- If client has been to ASC most fields will already be complete. Confirm or update fields as needed to show what was true as of STH program entry date.



Select an Assessment

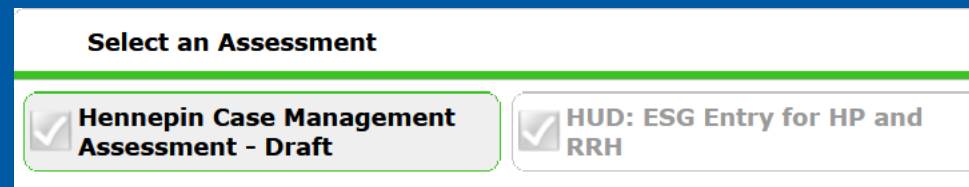
Hennepin Case Management Assessment - Draft

HUD: ESG Entry for HP and RRH

4. Save (not Save and Exit)

Hennepin County

5. Complete Case Management Assessment



Select an Assessment

Hennepin Case Management Assessment - Draft

HUD: ESG Entry for HP and RRH

- If client has already had a CES assessment, some fields will already be complete. Confirm or update fields as needed.

6. Update Case Managers Tab

- Add end date for any CMs who are no longer working with client
- Add new CMs associated with client if known

- Save and Exit



Program Update - Contacts

Program Update Workflow - HMIS

1. EDA to STH provider
2. Search for client
3. Search for program entry

Option 1 - On the Entry Exit Page

- Click the Interim button

The screenshot shows the 'Client Information' page with the 'Entry / Exit' tab selected. A table lists the entry details for 'zz-HCC Test Provider - Case Management (5415)'. The 'Interims' column for this entry is highlighted with a green box, indicating the button to be clicked.

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
zz-HCC Test Provider - Case Management (5415)	Basic	10/01/2021				

Option 2 - On Summary Page

- Click the edit entry pencil to open the entry, save and continue, then click the interim button

The screenshot shows the 'Entry/Exits' section of the summary page. A table lists the entry details for 'zz-HCC Test Provider - Case Management'. The pencil icon in the 'Entry Date' column is highlighted with a green box, indicating the button to be clicked to edit the entry.

Program	Type	Entry Date	Exit Date
zz-HCC Test Provider - Case Management	Basic	10/01/2021	

The screenshot shows the 'Household Members Associated with this Entry / Exit' page. A table lists the household members. The 'Interims' column for the member '(1165630) Testeleon, Casey' is highlighted with a green box, indicating the button to be clicked.

Name	Head of Household	Entry Date	Exit Date	Interims	Follow Ups	Reason for Leave
(1165630) Testeleon, Casey		10/01/2021				

Program Update Workflow - HMIS

4. Create Interim

1. Add interim review

Interim Reviews

Interim Reviews Associated with this Entry / Exit

Review Date	Review Type	Client Count
No matches.		

Add Interim Review

2. Review Type = Update

Add Interim Review - (1165630) Testeleon, Casey

Interim Review Data

Entry / Exit Provider	zz-HCC Test Provider - Case Management (5415)
Entry / Exit Type	Basic
Interim Review Type*	Update
Review Date*	10 / 12 / 2021 8 : 18 : 14 AM

3. Update Case Management Assessment

Interim Review Assessment

Select an Assessment

- Hennepin Case Management Assessment - Draft
- HUD: ESG Entry for HP and RRH
- Notes about client
- HUD: CoC & ESG Update

- Record Current Living Situation (and location details)
- Update any fields where information has changed since last contact

4. Save and Exit

Program Update Workflow - HMIS

5. If all entry information was not collected at entry, add any missing information you've since collected to the entry assessment.

The screenshot displays the 'Client Information' interface with the 'Entry / Exit' tab selected. A reminder message states: 'Reminder: Household members must be established on Households tab before creating Entry / Exits'. Below this, a table titled 'Entry / Exit' contains the following data:

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
zz-HCC Test Provider - Case Management (5415)	Basic	0/01/2021				

An edit icon (pencil) is highlighted in the 'Entry Date' column of the first row. Below the table is an 'Add Entry / Exit' button and a status indicator 'Showing 1-1 of 1'.

Program Exit

Program Exit Workflow - HMIS

1. EDA to STH provider
2. Search for client
3. Search for program entry

Option 1 - On the Entry Exit Page

- Click the Exit Date edit pencil to create the exit

Client Information | Service Transactions

Summary | Client Profile | Households | **Entry / Exit** | Case Managers | Case Plans | ROI | Assessments

Reminder: Household members must be established on Households tab before creating Entry / Exits

Program	Type	Entry Date	Exit Date	Interims	Follow Ups	Client Count
zz-HCC Test Provider - Case Management (5415)	Basic	10/01/2021				

Add Entry / Exit | Showing 1-1 of 1

Option 2 - On Summary Page

- Click the edit date exit pencil to create the exit

Households | Entry/Exits

ID	Type	Head of Household	Relationship	Program	Type	Entry Date	Exit Date
				zz-HCC Test Provider - Case Management	Basic	10/01/2021	

Search Existing Households | Start New Household | Add Entry / Exit | Showing 1-1 of 1

Goal

Classification	Type	Date Added	Notes
Legal	Increase understanding of	10/11/2021	

Case Managers

Name	Provider	Phone Number
Joe Johnson	zz-HCC Test Provider - Case Management	612.555.1234

Program Exit Workflow - HMIS

4. Create Exit

1. Record Destination

- Reason for leaving is optional
- Destination is used to track housing outcomes

2. Save and Continue to assessment

Edit Exit Data - (1165630) Testeleon, Casey

Edit Exit Data - (1165630) Testeleon, Casey

Exit Date *	10 / 12 / 2021 3 : 31 : 53 PM
Reason for Leaving	Completed program
If "Other", Specify	
Destination *	Rental by client in a public housing unit (HUD)
If "Other", Specify	
Notes	

Save & Continue Cancel

Program Exit Workflow - HMIS

5. Update Current Living Situation (optional)

6. Update Contact info

Contact Information	
Preferred Contact Method	<input type="text" value="-Select-"/> G
Email where you can be reached or where a message can be sent:	<input type="text"/> G
Phone number where you can be reached or where a message can be left:	<input type="text"/> G
Mailing address where you can reliably receive mail	<input type="text"/> G
If Physical Location is preferred contact method, indicate location:	<input type="text"/> G
Alternative Contact #1 Name	<input type="text"/> G
Alternative Contact #1 Relationship	<input type="text"/> G
Alternative Contact #1 Email	<input type="text"/> G
Alternative Contact #1 Phone	<input type="text"/> G

6. Update ESG assessment measures (optional)

7. Update Case Managers Tab

- Add end date for any CMs who are no longer working with client
- Add new CMs associated with client if known

Reporting

Provider or SAP Reports

- By-name list
 - CM and CES status
- Core Report
 - Who is being served
 - Outcomes
- Contact and Engagement Report
 - How long since last contact
 - Clients who are engaged
- Client Coordinated Entry Status
 - Who is on or off CES Priority list
 - Referral status
- 222 Agency Check Report
 - Will show errors for clients who are not on the CES Priority List

For questions about using HMIS, contact

Institute for Community Alliances

- General HMIS questions
- www.hmismn.org
- mnhmis@icalliances.org

Hennepin County

- Street to Housing workflow specific questions
- Teresa.Howard@Hennepin.us
- Erin.Wixsten@hennepin.us

CES Inbox

- CES Assessment or Process Questions (other than HMIS specific)
- CES.Hennepin@hennepin.us