HENNEPIN COUNTY

MINNESOTA

Streets to Housing HMIS Training

July 21, 2022

Hennepin County

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

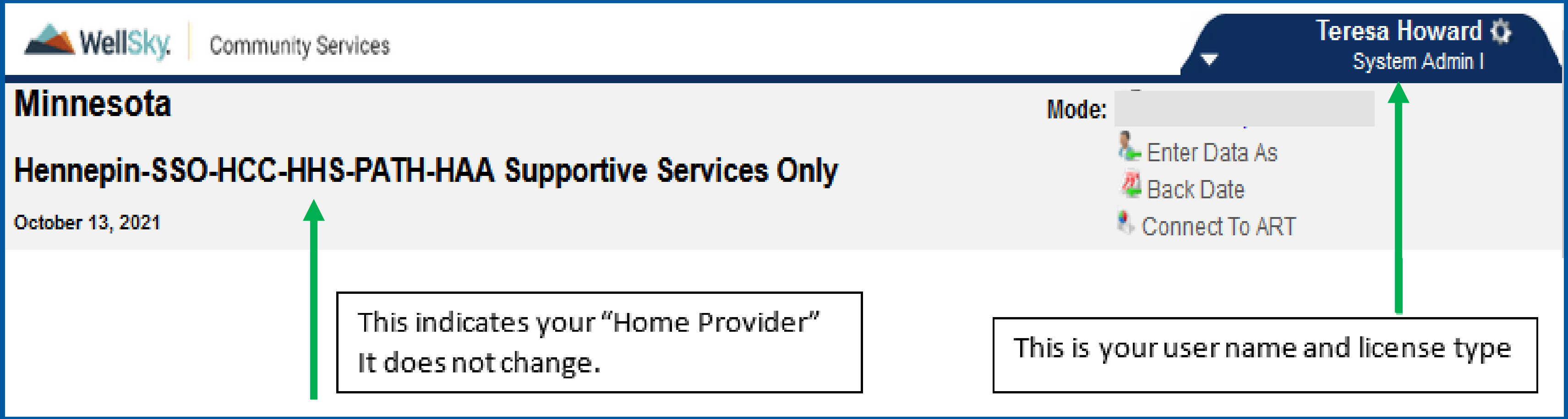
*Will be recorded for future reference

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

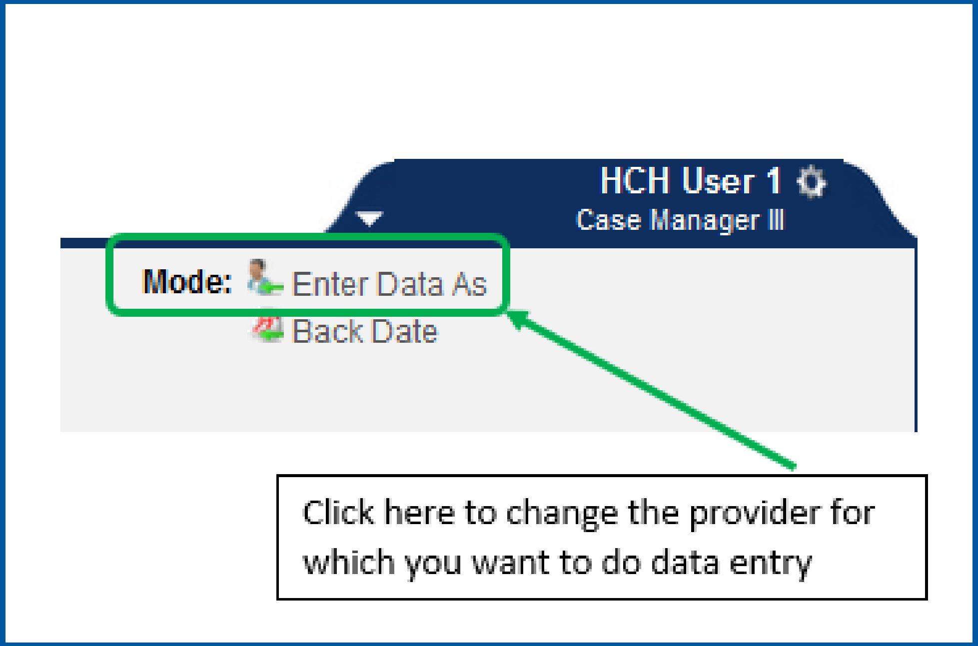


- Users "Home Provider" is not the same as your Streets to Housing provider

Selecting the Right Provider

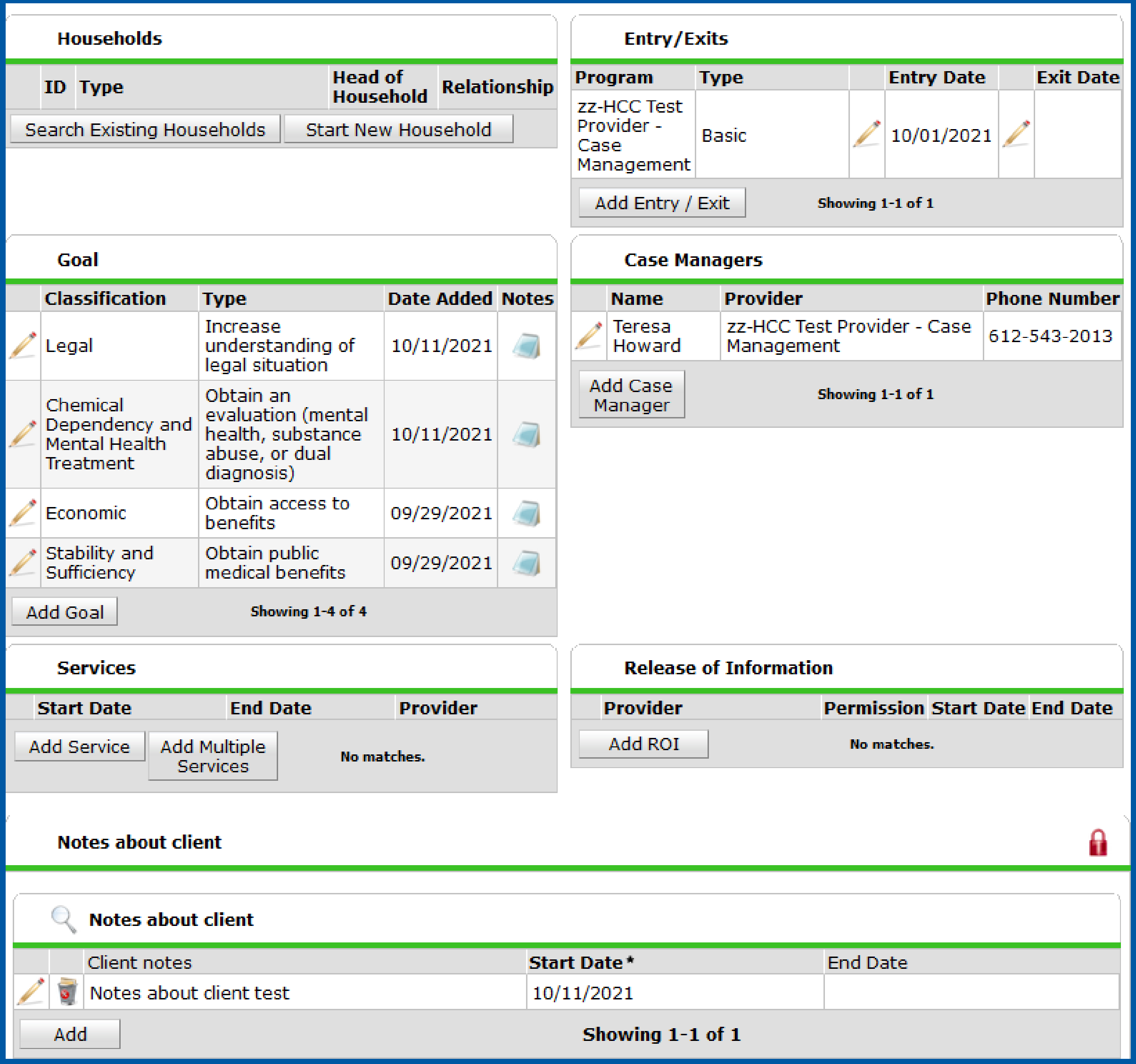
Changing roles in HMIS requires changing providers

- 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



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

*See Tip sheet for updating clients in multiple programs

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)

*See Tip sheet for updating clients in multiple programs

Program Exit Workflow Summary - HMIS

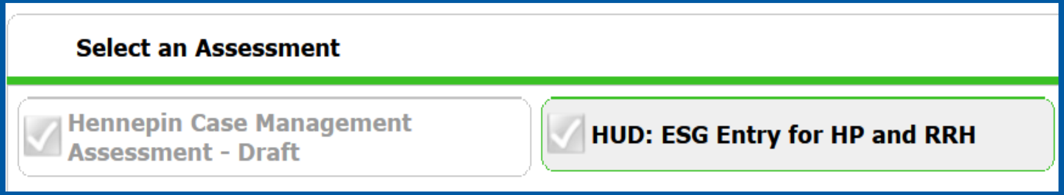
1. EDA to STH provider
2. Search for client
3. Locate program entry
4. Create Exit
    1. Record exit date and destination
    2. Record CLS (and location details)
    3. Update Contact Info and Documents in CM Assessment
    4. Update ESG measures (optional)

*See Tip sheet for exiting clients in multiple programs

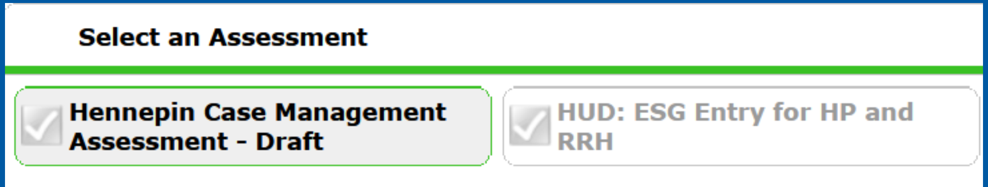
Program Entry

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.



4. Save (not Save and Exit)
5. Complete Case Management Assessment



   - 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

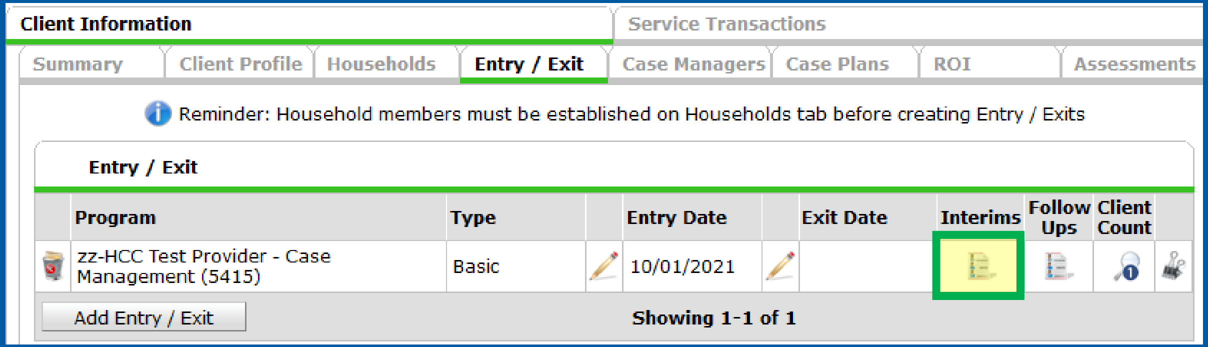
Program Update - Contacts

Program Update Workflow - HMIS

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

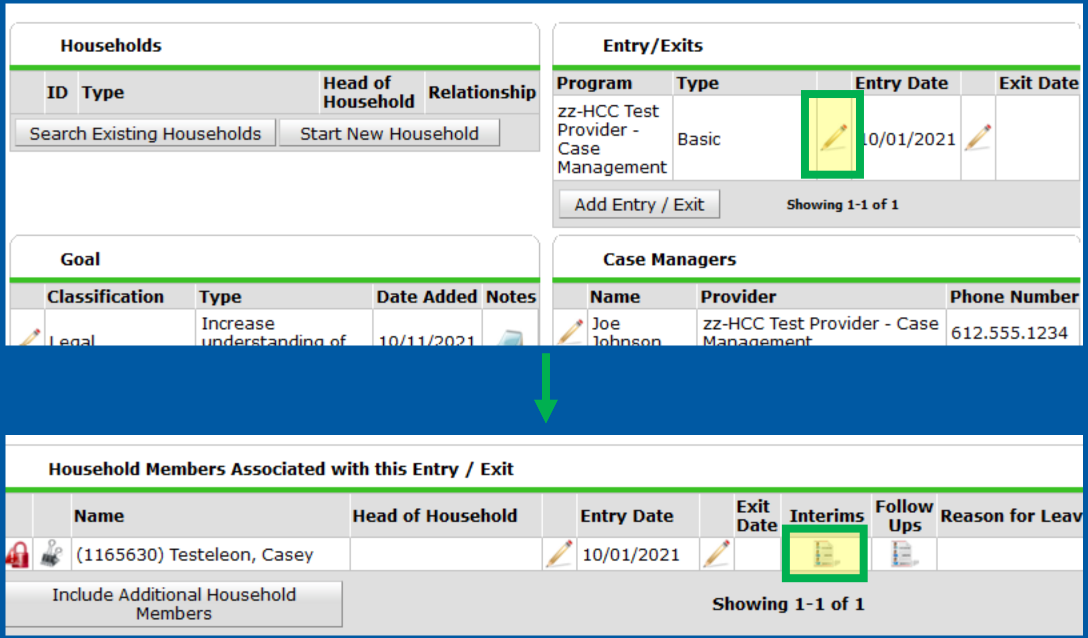
Option 1 - On the Entry Exit Page

- Click the Interim button



Option 2 - On Summary Page

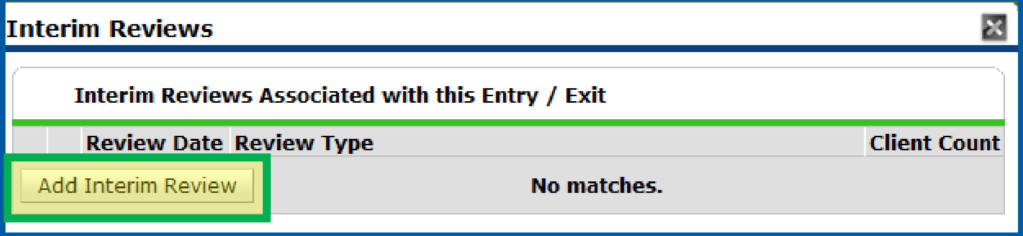
- Click the edit entry pencil to open the entry, save and continue, then click the interim button



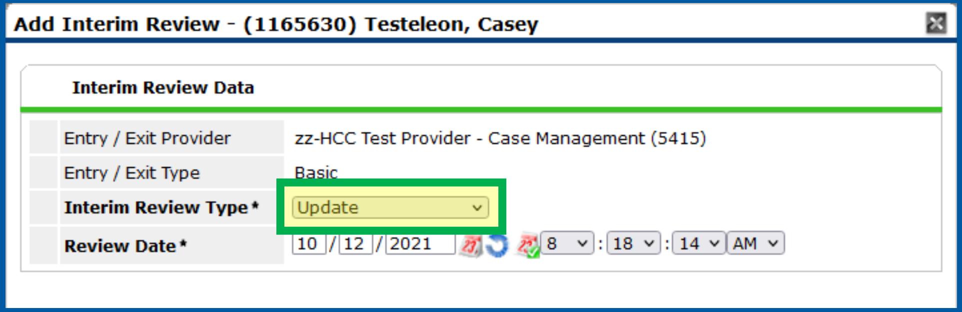
Program Update Workflow - HMIS

4. Create Interim

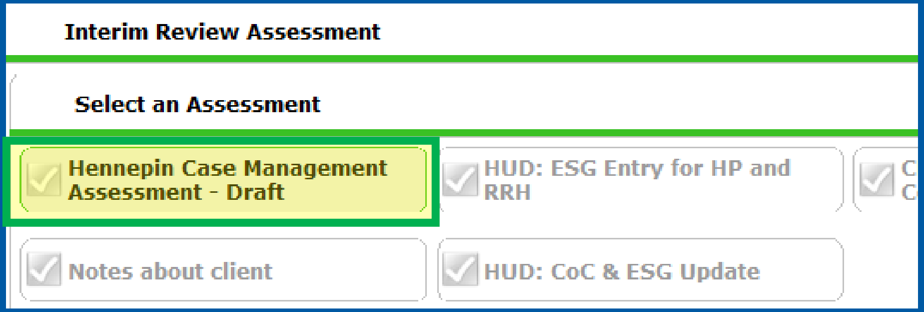
1. Add interim review



2. Review Type = Update



3. Update Case Management Assessment



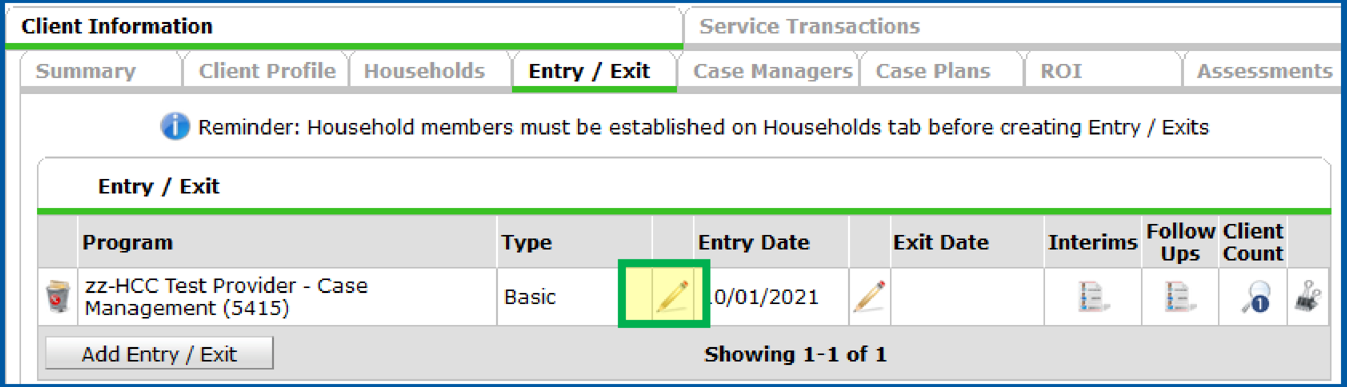
   a. Record Current Living Situation (and location details)

   b. 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.



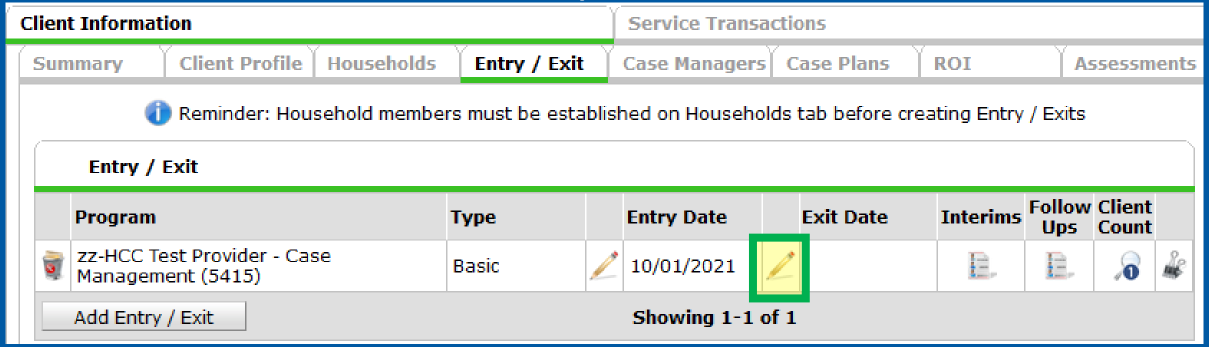
Program Exit

Program Exit Workflow - HMIS

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

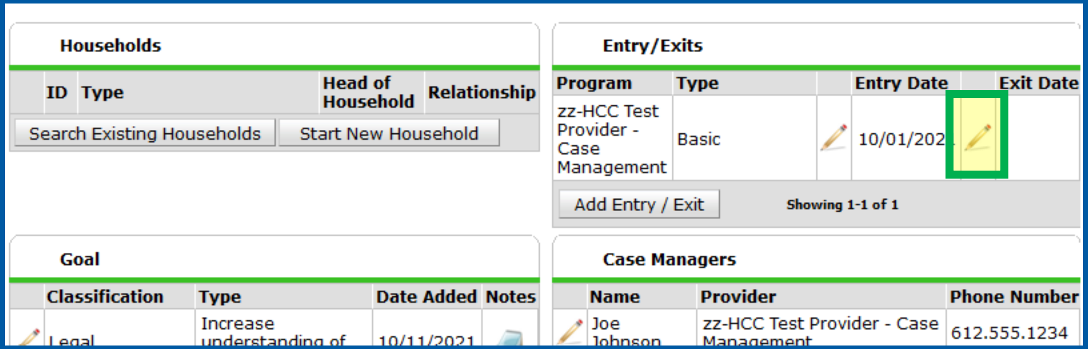
Option 1 - On the Entry Exit Page

- Click the Exit Date edit pencil to create the exit



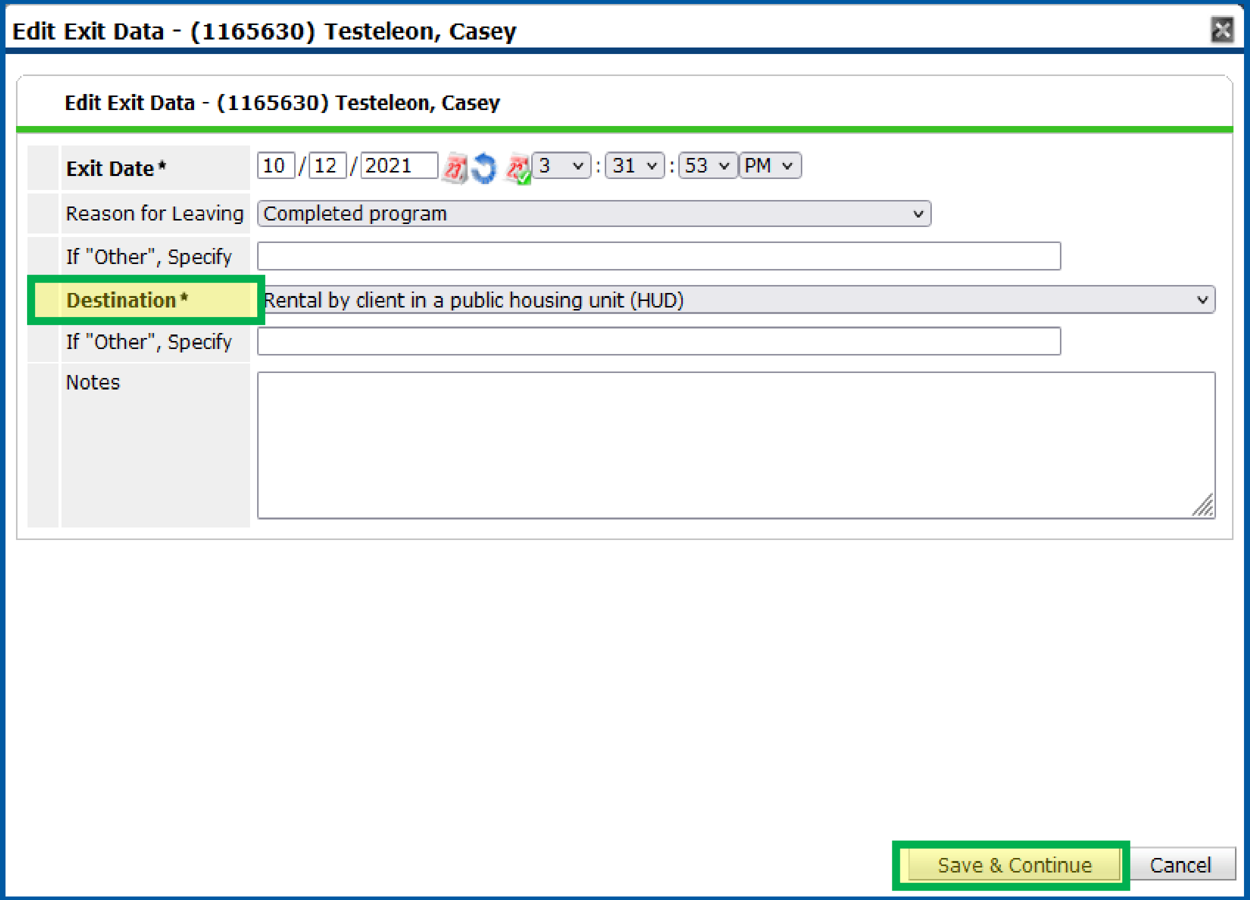
Option 2 - On Summary Page

- Click the edit date exit pencil to create the exit



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



Program Exit Workflow - HMIS

5. Update Current Living Situation (optional)

6. Update Contact info

Contact Information

Preferred Contact Method	-Select-
Email where you can be reached or where a message can be sent:	
Phone number where you can be reached or where a message can be left:	
Mailing address where you can reliably receive mail	
If Physical Location is preferred contact method, indicate location:	
Alternative Contact #1 Name	
Alternative Contact #1 Relationship	
Alternative Contact #1 Email	
Alternative Contact #1 Phone	

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