

Tips for Clients Enrolled in Multiple Projects

Data entry tips for clients enrolled in multiple projects at the same agency. This information is applicable for Case Management (CM), HUD, ESG, PATH, YHDP 18+, and Coordinated Entry (CE) providers. This is not recommended for minor youth providers which are closed to statewide data sharing.

General Tip: Start with data entry for the Federal- or State-mandated project first (such as HUD, ESG, PATH, or YHDP). Next move on to CE. Finally, finish with the local or Hennepin County funded project.

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Question: Do I need to change EDAs or record multiple initial entries if my client is enrolled in multiple programs?

Answer: Yes! An entry needs to be created for each program your client is enrolled in. Each program has an assessment connected to it as well. However, many questions are the same across assessments and clients' responses will copy over to each assessment, no matter where they are entered. Shared assessment questions recorded on Federal- or State-Funded Projects assessments will be copied to your CES or CM assessments!

Recommended Workflow:

1. Client is enrolled in a Federally Funded Project **and** a CE client:
 - a. EDA to Federally Funded provider.
 - i. Create an entry and complete any assessment data elements required at entry/project start.
 1. **If client is a YHDP client**, click Save and then scroll to the top to select the CM assessment. Complete any additional assessment data elements required at entry/project start. **Skip step 1C below.**
 - ii. Save and Exit when finished.
 - b. Change EDA to CE provider.
 - i. Create a CE entry and complete any additional assessment data elements required at entry/project start.
 - ii. Save and Exit when finished.
 - c. Change EDA to CM provider.
 - i. Create a CM entry and complete any additional assessment data elements required at entry/project start. (There should only be a couple left at this point!)
 - ii. Record case manager info on the Case Managers tab (if not already completed).
 - iii. Create a case plan on the Case Plans tab. (Homeless to Housing CMs **only**)
 - iv. Save and Exit when finished.
2. Client is a Federally Funded Project **but not** a CE client:
 - a. Follow steps **a** and **c** from section 1 above.
3. Client is a CM **and** a CE client (not in a Federally Funded project):
 - a. Follow steps **b** and **c** from section 1 above.

Question: When recording a client's Current Living Situation (CLS), do I need to change EDAs or record multiple CLS values if that client is enrolled in multiple programs?

Answer: Follow your Federal recommended workflow. A CLS recorded there will be shared with your CES or CM record!

Recommended Workflow:

1. Client **is** enrolled in Federally-Funded Project:
 - a. EDA to Federally-Funded Project provider.
 - b. Complete the interim update assessment, recording a CLS value there.
 - c. Save and Exit when finished. No need to record a separate CLS value for CM or CE.
2. Client **is not** enrolled Federally-Funded Project:
 - a. EDA to CM or CE provider.
 - b. Complete the interim update assessment, recording a CLS value there.
 - c. Save and Exit when finished. No need to record a separate CLS for CM or CE if client is enrolled in both.

Question: When adding an interim update to a client's entry, do I need to change EDAs or add multiple interim updates if that client is enrolled in multiple programs?

Answer: If client is enrolled in a Federally-Funded Project, follow your Federal recommended workflow first. Shared assessment questions recorded on Federal- or State-funded assessments will be copied to your CES or CM assessments!

Recommended Workflow:

1. Client is enrolled in a Federally-Funded Project **and** CE:
 - a. EDA to Federally-Funded Project provider. You will stay in EDA to this provider for all steps below and do not need to change EDA.
 - b. Find the Federally-Funded Project entry and add an interim update.
 - c. Complete the interim update assessment for the Federally-Funded Project. The required assessment will appear by default.
 - d. Save, then scroll to the top of the assessment.
 - e. Select the Hennepin CES assessment and complete any necessary updates.
 - f. Save, then scroll to the top of the assessment once again.
 - g. Select the Hennepin Case Management assessment and complete any remaining updates.
 - h. Save and Exit when finished.
2. Client is enrolled in a Federally-Funded Project **but not** in CE:
 - a. Follow steps **a - d** and **g - h** from section 1 above
3. Client is enrolled in CM **and** CE (not in a Federally-Funded Project):
 - a. EDA to CM Provider.
 - b. Follow steps **e - g** from section 1 above
 - c. Save and Exit when finished.

Question: Do I need to be in my CM provider when creating Case Plan Goals or updating Action Items?

Answer: It's best practice to EDA to CM provider when using the Case Plan section (option 1). However, you can change the assigned provider for each case plan step if need be (option 2).

Note: If client is a YHDP client, the Federally-Funded Project Provider and the CM provider are the same combined provider. No need to switch EDAs or search for the CM project (option 2).

Recommended Workflow:

1. Client **is** enrolled in a Federally-Funded Project (Option 1):
 - a. EDA to Federally-Funded Project provider.
 - b. Complete required data entry for that provider in the Entry/Exit tab.
 - c. Switch EDA to CM provider.
 - d. Click on "Last Viewed" to quickly reopen your client's record.
 - e. Click on the Case Plans tab.
 - f. Add or update goals or action steps as needed.
2. Client **is** enrolled in a Federally-Funded Project (Option 2):
 - a. EDA to Federally-Funded Project provider.
 - b. Complete required data entry for that provider in the Entry/Exit tab.
 - c. Click on the Case Plans tab.
 - d. When adding new goals or action steps, use the "Search" field to select your CM provider. The default will be your Federally-Funded Project provider, but you can change it to your CM provider.

Provider *	zz-HCC Test Provider - Case Management (5415)	Search	My Provider	Clear
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3. Client **is not** an enrolled in a Federally-Funded Project Provider:
 - a. EDA to CM provider.
 - b. Click on the Case Plans tab.
 - c. Add or update goals or action steps as needed.

Question: Do I need to EDA to multiple providers in order to exit my client from multiple projects on the same date?

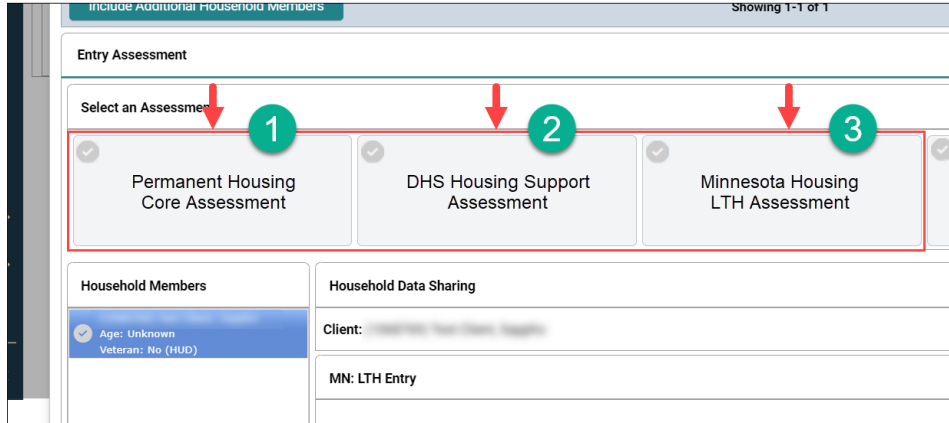
Answer: If client is exiting a Federally-Funded Project, follow your Federal recommended workflow first. Shared assessment questions recorded on Federal or State Funded Project assessments will be copied to your CES or CM assessments!

Recommended Workflow: These steps can be taken in the Entry/Exit or Summary tab.

1. Client is exiting a Federally-Funded Project **and** a CE **and** a CM program on the same date:
 - a. EDA to Federally-Funded Project provider. You will stay in EDA to this provider for all steps below and do not need to change EDA.
 - i. **If client is a YHDP client, Skip step 1d below.**
 - b. Exit the client from their Federally-Funded Project entry.
 - i. Record an Exit Date and Destination.
 - ii. Complete the assigned assessment.
 - iii. Save and Exit when finished.
 - c. Exit the client from their CE entry.
 - i. Record an Exit Date and Destination.
 - ii. Complete the assigned assessment.
 - iii. Save and Exit when finished.
 - d. Exit the client from their CM entry.
 - i. Record an Exit Date and Destination.
 - ii. Complete the assigned assessment.
 - iii. Save and Exit when finished.
 - e. Add an End Date to your personal entry on the Case Managers tab.
2. Client is exiting a Federally-Funded Project program **and** CE program **but not a CM program:**
 - a. Follow steps **a, b, and c** from section 1 above
3. Client is exiting a Federally- Funded Project **and** CM program **but not** a CE program:
 - a. Follow steps **a, b, d, and e** from section 1 above.
4. Client is exiting a CM **and** CE program (not a Federally Funded Project):
 - a. EDA to CE Provider.
 - b. Follow steps **c - e** from section 1 above.
5. Client is exiting a CM program **only:**
 - a. EDA to CM provider.
 - b. Follow steps **d and e** from section 1 above.

Question: How do I toggle between multiple assessments?

The primary assessment users will see upon creating an Entry/Interim/Exit will be a "core" one assigned based on the Project Type of that provider. For example, all Permanent Housing providers will see "Permanent Housing Core Assessment" upon creating a new Entry.



Then, there will be separate tabs that contain the Entry questions specific to the funding sources associated with that program. If a provider has no HMIS-required funding sources, then there will be no additional assessments, just the primary Common one, to complete.

Full instructions: [Using multiple assessments in one provider](#)