

## Maryland Balance of State Continuum of Care HMIS Training Manual: Coordinated Entry

### Basic Coordinated Entry Data Steps:

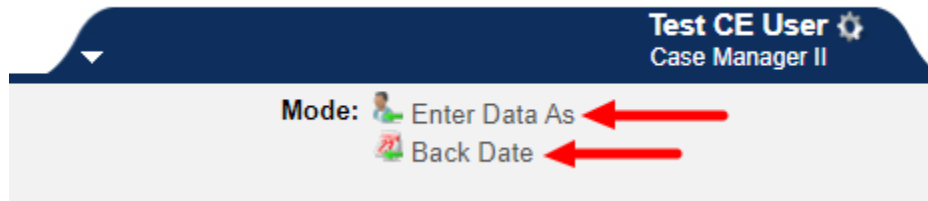
*\* If applicable, use “Enter Data As” (EDA) mode to switch to your local CE provider before data entry*

*\* If entering data for a later date, be sure to use “Back Date” mode for each applicable client*

1. ClientPoint module to search for your client, or create a new client record
2. Households tab, if applicable (do not create households for single persons)
3. Initial SSM Measurement + Entry Date
4. Interim SSM Measurement + Interim Review
5. Final SSM Measurement + Exit Date

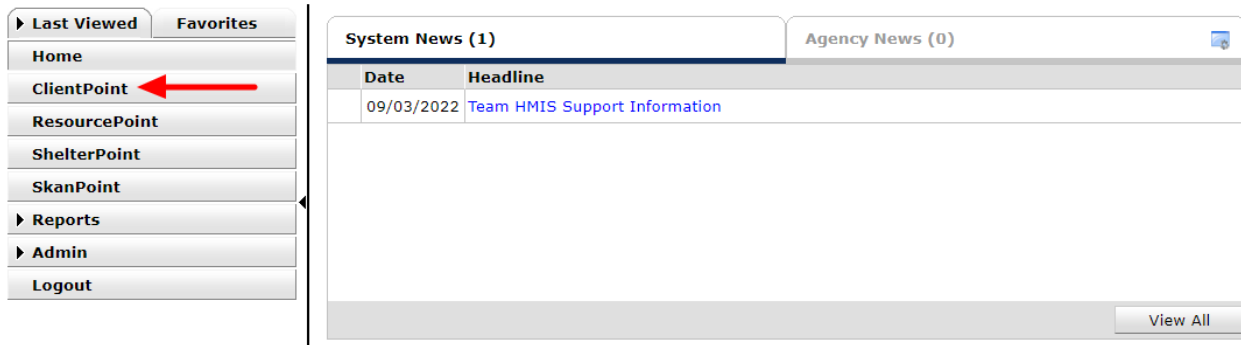
\* If entering data on a different date from the date you saw your client, use **“Back Date”** mode.


\*\* If you enter data for more than one provider, select the correct provider by clicking **“Enter Data As”** on the top right corner; select the correct CE provider by clicking the **+** icon.



### Client Search:

1. Click **“ClientPoint”** on the left side menu.



2. Search for your client by First and Last Name only, and then click their name or .


#### Client Search

i Please Search the System before adding a New Client.

Name	<input style="border: 1px solid red;" type="text" value="Jane"/>	Middle	<input style="border: 1px solid red;" type="text" value="Jetson"/>	Suffix	<input type="text"/>
Name Data Quality	-Select-				
Alias	<input type="text"/>				
Social Security Number	<input type="text"/> - <input type="text"/> - <input type="text"/>				
Social Security Number Data Quality	-Select-				
U.S. Military Veteran?	-Select-				
Exact Match	<input type="checkbox"/>				

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#### Client Results

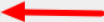




	ID	Name ▲	Social Security Number	Date of Birth
	466	Jetson, Jane	278-56-9879	01/01/1977

2a. If your client is not found, create a new client by completing the areas indicated below, then click "Add New Client With This Information."

**Completing the areas indicated below is absolutely required!!!**

**Client Search**

 Please Search the System before adding a New Client.

Name 	First	Middle	Last	Suffix
	Jane		Jetson	
Name Data Quality 	Full Name Reported			
Alias	Optional			
Social Security Number 	278	- 56	- 9879	
Social Security Number Data Quality 	Full SSN Reported (HUD)			
U.S. Military Veteran? 	No (HUD)			
Exact Match	<input type="checkbox"/>			

## Households:

**DO NOT COMPLETE THIS STEP IF YOUR CLIENT IS LIVING ALONE (your client may have a family, but is not living with anyone else at the time of entry into your project)**

1. Click the **“Households”** tab.
2. If no household is listed, create a new household by clicking **“Start New Household.”**  
To complete/ update an existing household, click **“Manage Household.”**

*Do not create a new household if there is an existing household. Always edit the existing household.*

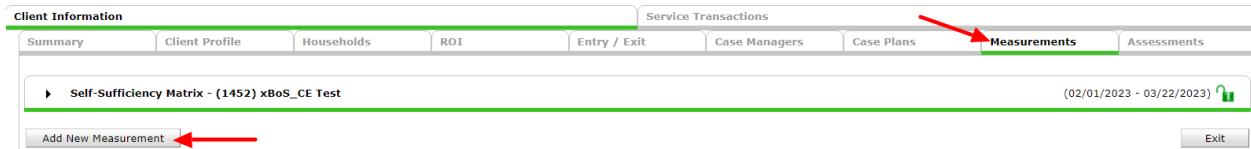
3. Be sure to complete the **“Head of Household”** and **“Relationship to Head of Household”** drop down for each family member. If needed, use the **“Add/Delete Household Members”** button to add members to the household.

*Do not remove clients from the household using the “Add/Delete Household Members” button.*

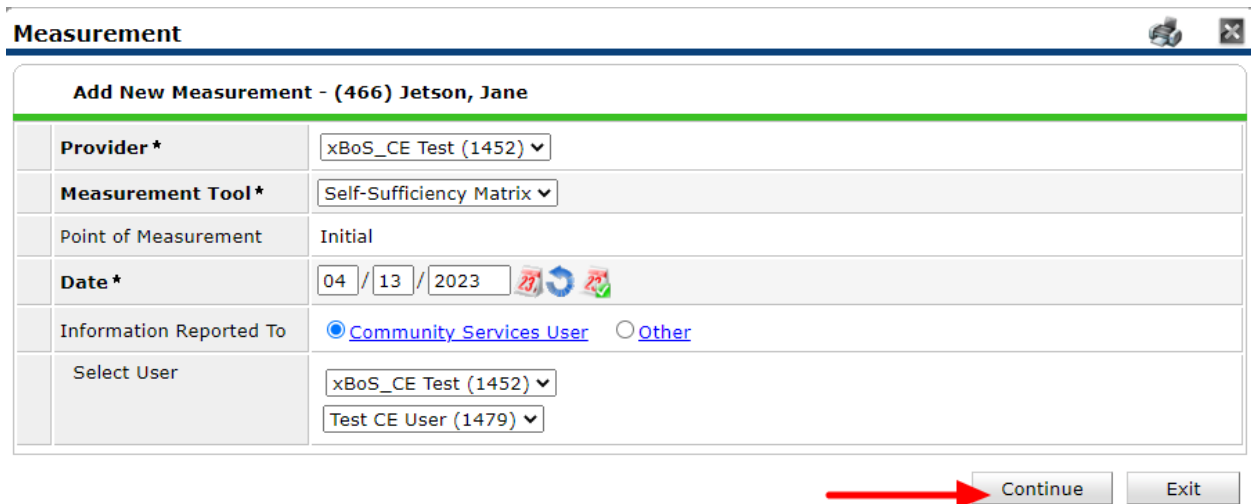
# Initial SSM Measurement:


**THIS STEP IS ONLY REQUIRED FOR HEAD OF HOUSEHOLDS.**

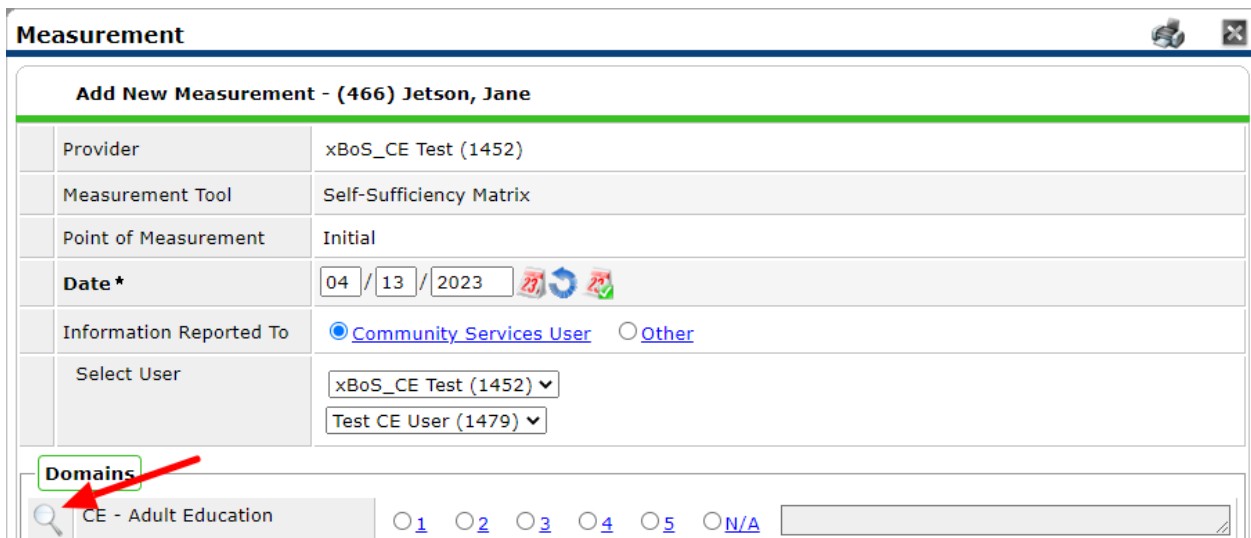
1. To create an Initial Measurement, go to the “Measurements” tab and click “Add New Measurement”.



2. The information will default to Initial Point of Measurement. So, click Continue.



3. Click the magnifying glass  on the first measurement to see the options to choose and then click “Submit and Move to Next” to complete the measurement.




**CE - Adult Education - Details**

**Score**

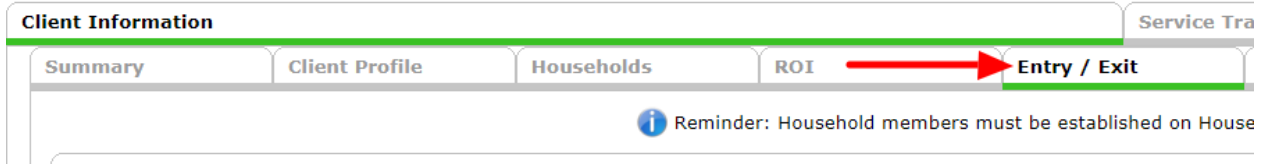
- 1 - Has completed education/training needed to become employable. No literacy problems.
- 2 - Needs additional education/training to improve employment situation and/or to resolved literacy problems to where they are able to function effectively in society.,
- 3 - Has high school diploma/GED.,
- 4 - Enrolled in literacy and/or GED program and/or has sufficient command of English to where language is not a barrier to employment.,
- 5 - Literacy problems and/or no high school diploma/GED are serious barriers to employment.,
- 

Comments



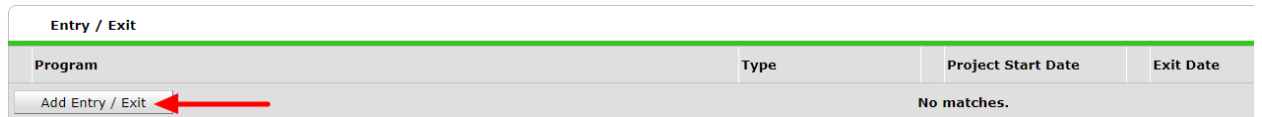
## Entry Date:

1. Click the "Entry/Exit" tab.



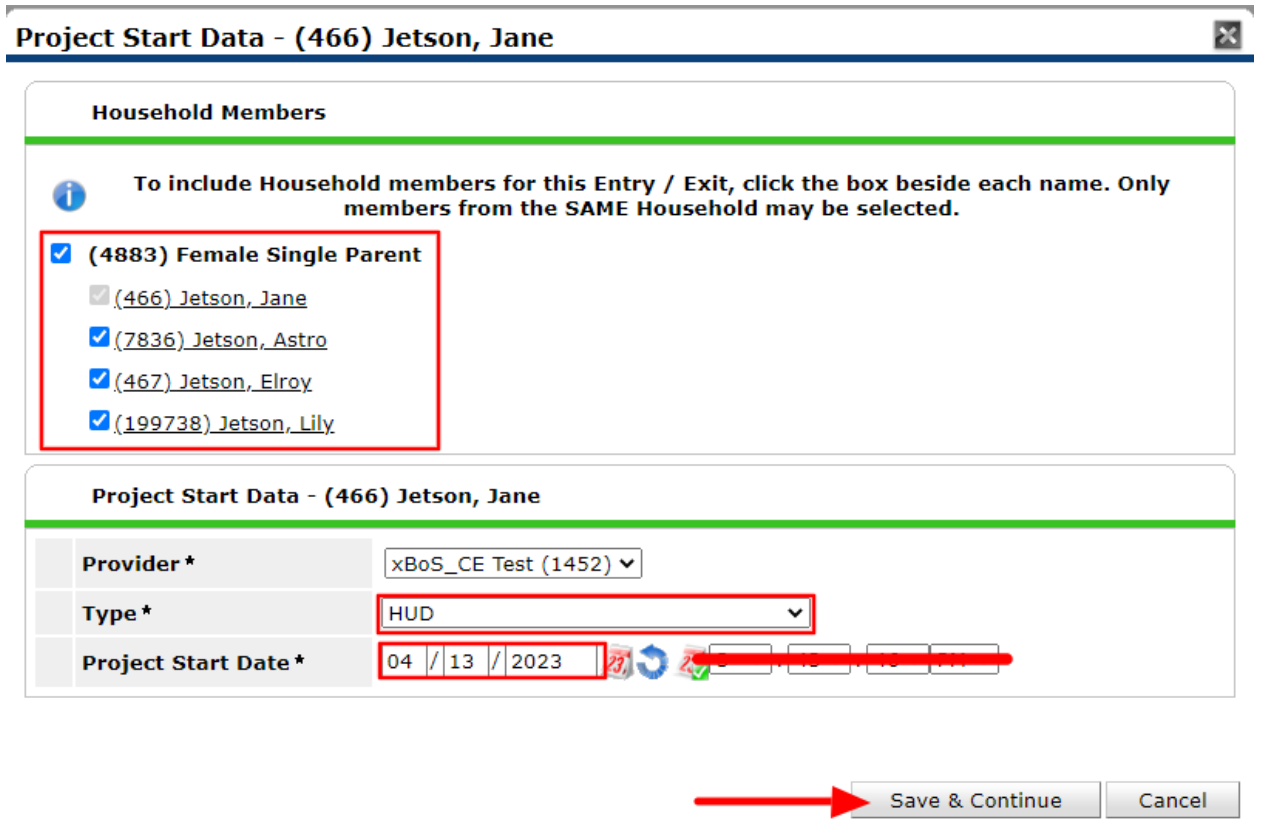
The screenshot shows a navigation bar with tabs: Client Information, Summary, Client Profile, Households, ROI, and Entry / Exit. A red arrow points to the 'Entry / Exit' tab. Below the tabs, a reminder message is visible: "Reminder: Household members must be established on House".

2. Click "Add Entry/Exit."



The screenshot shows a table with columns: Program, Type, Project Start Date, and Exit Date. The text "No matches." is displayed in the table area. A red arrow points to the "Add Entry / Exit" button located at the bottom left of the table.

3. If applicable, select all household members entering with Head of Household (the head of household will be selected by default). The "Type" is always "HUD." Enter your "Project Start Date". Always disregard time fields. Click "Save & Continue."



The screenshot shows a dialog box titled "Project Start Data - (466) Jetson, Jane". It contains a section for "Household Members" with a list of names and checkboxes. The first name, "(4883) Female Single Parent", is highlighted with a red box. Below this, there are four names with checkboxes: "(466) Jetson, Jane", "(7836) Jetson, Astro", "(467) Jetson, Elroy", and "(199738) Jetson, Lily".

Below the household members section, there is a section for "Project Start Data - (466) Jetson, Jane" with the following fields:

- Provider \*: xBoS\_CE Test (1452) (dropdown)
- Type \*: HUD (dropdown)
- Project Start Date \*: 04 / 13 / 2023 (calendar icon)

At the bottom right, there are two buttons: "Save & Continue" and "Cancel". A red arrow points to the "Save & Continue" button.

4. Complete/update assessment for the Head of Household, then click **“Save”** at the bottom of the assessment. If entering for multiple family members, scroll to the top of the assessment after saving and click the **“Add Household Data”** button to copy common data to household members.

4a. If entering for multiple family members, click the name of each household member entering (on the left) to complete/update their entry assessment (selected client will be highlighted in **BLUE**). Repeat this step until all client entry assessments are completed, and then click **“Save & Exit”** at the bottom of the last client’s assessment screen.

5. Complete/update and HUD questions but also the CE questions. These questions need to be completed per instructions to identify the appropriate next steps and verify housing needs.



See custom CE data elements below:

<b>Family Type *</b>	Adults & Children ▾ G
<b>Total Adults *</b>	02 ▾ G
<b>Total Children *</b>	02 ▾ G
<b>Household Size *</b>	04 ▾ G

**Coordinated Entry Assessment**

	Date of Assessment *	End Date	Assessment Location	Assessment Type	Assessment Level	Prioritization Status
	08/12/2022		Allegany County	Phone	Crisis Needs Assessment	Placed on Prioritization List

Add Showing 1-1 of 1

**Coordinated Entry Event**

	Start Date *	Date of Event *	Event *	Referral Result	Date of Result
	08/12/2022	08/12/2022	Referral to post-placement/follow-up case management	Successful referral: client accepted	08/12/2022

Add Showing 1-1 of 1

**BoS CE Housing Needs & Preferences**

	Start Date *	Max Bedrooms Needed	Min Bedrooms Needed	Change in HH expected in next 12 Mos?	ADA Unit Accessibility Needed?	Would being closer/further from geographic area promote stability?	Pet Friendly Unit Needed?	If Yes, what type of pet?	Is your pet a certified service animal?
	05/01/2020	04	04	No	Yes	Yes	Yes		

Add Showing 1-1 of 1

**BoS CE Housing Barriers**

	Start Date *	Criminal History Felony	Criminal History Arson	Criminal History Sex Offender	Criminal History Meth Production	Criminal History Other Recent Misdemeanors	Eviction History Type	Eviction Number of Times	Poor credit or lack of rental history?
	03/09/2023	No	No	No	No	No	Evictions		Yes
	02/01/2023	No	No	No	Yes	Yes	Evictions	02	Yes

Add Showing 1-2 of 2


**BoS CE Critical Documents Uploads**

	Start Date *	Doc Type *
	07/08/2021	Verification Of Disability
	07/08/2021	Verification of Homeless Episodes Not in HMIS

Add Showing 1-2 of 2

## Interim SSM Measurement + Interim Review:

1. Create Interim Measurement
2. To add an Interim Review, click the **“Entry/Exit”** tab and click the corresponding paper **“Interims”** icon next to the **“Entry Date”** you already created.

Entry / Exit				
Program	Type	Project Start Date	Exit Date	Interims <sup>F</sup>
DSS: Day Resource Center (6172)	HUD	02/01/2018		
Add Entry / Exit				

Showing 1-1 of 1

3. Make sure all clients have a check mark next to their name. Select the **“Interim Review Type”** then enter the **“Review Date.”** Update the Interim Review assessment, if applicable. Always disregard time fields.

### Household Members

**To include Household members associated with the Entry / Exit for this Interim Review, click the box beside each name.**

- (31831) Female Single Parent**
  - (21319) Jetson, Jane (Entry Date: 02/01/2018 9:36 AM)
  - (99979) Jetson, Elroy (Entry Date: 02/01/2018 9:36 AM)


### Interim Review Data




Entry / Exit Provider	DSS: Day Resource Center (6172)
Entry / Exit Type	HUD
<b>Interim Review Type *</b>	-Select-
<b>Review Date *</b>	7 . 57 . 03 AM

Select “Update” for Interim Review Type

## Final SSM Measurement + Exit Date:

1. Create Final Measurement
2. When the client has found permanent housing or otherwise leaving the CE project, create an exit.

Go to the **“Entry/Exit”** tab, and then click  next to the blank corresponding **“Exit Date”** on your entry. Never add an exit date for any other program’s entry.


Entry / Exit			
Program	Type	Project Start Date	Exit Date
 xBoS_CE Test (1452)	HUD	 04/13/2023	

Add Entry / Exit Showing 1-1 of 1

3. Select other household members, if applicable. Enter **“Exit Date.”** Select **“Reason for Leaving”** and **“Destination”**. Click **“Save & Continue.”** Always disregard time fields.







### Edit Exit Data - (466) Jetson, Jane

**Household Members**

 To update Household members for this Exit Data, click the box beside each name.

- (4883) Female Single Parent
  - (466) Jetson, Jane
  - (7836) Jetson, Astro
  - (467) Jetson, Elroy
  - (199738) Jetson, Lily

**Edit Exit Data - (466) Jetson, Jane**

**Exit Date \***       


**Reason for Leaving**

If "Other", Specify

**Destination \***

If "Other", Specify

Notes



4. Update the exit assessment for all applicable household members. Use the **“Add Household Data”** button to copy common data to household members. Click **“Save & Exit.”**