Maryland Balance of State Continuum of Care

HMIS Training Manual: Coordinated Entry

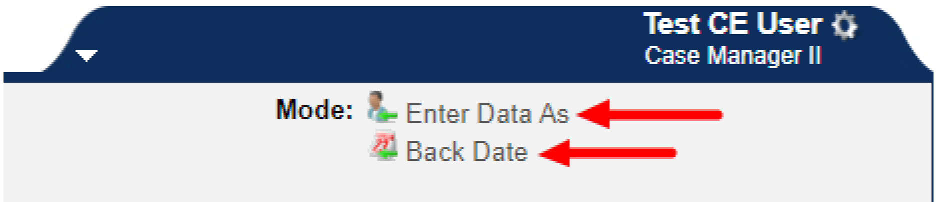
Basic Coordinated Entry Data Steps:

** 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

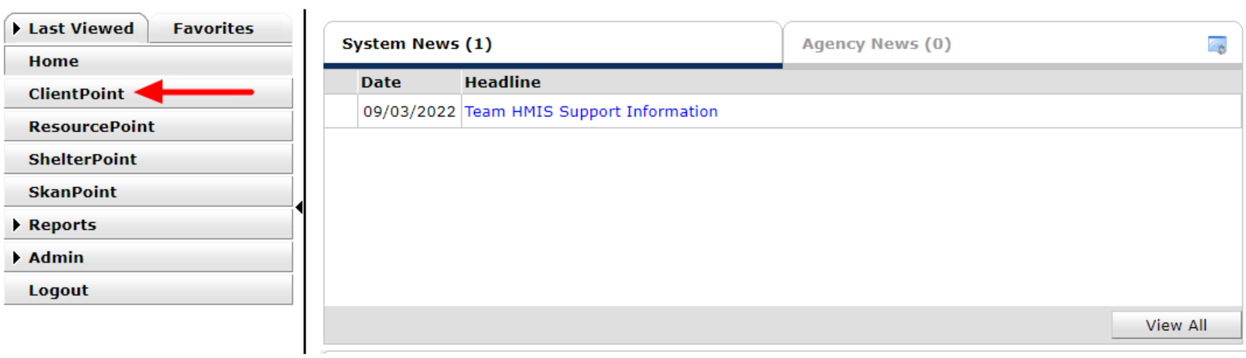
** If entering data on a different date from the date you saw your client, use "**Back Date**" mode.*

*** 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.*

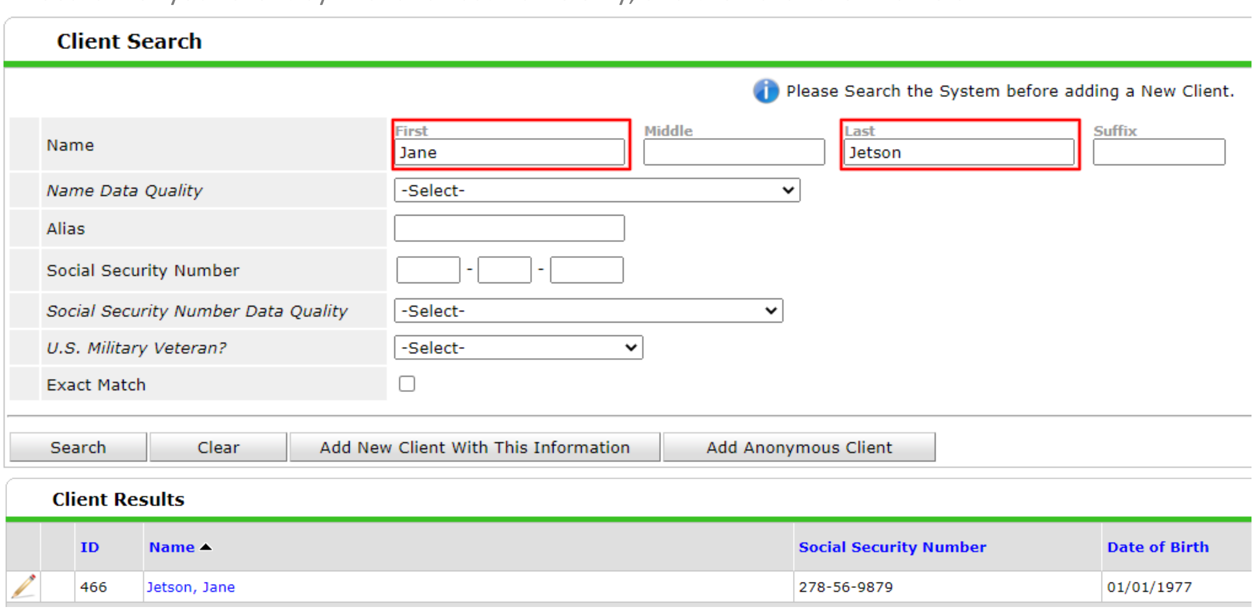


Client Search:

1. Click "***ClientPoint***" on the left side menu.

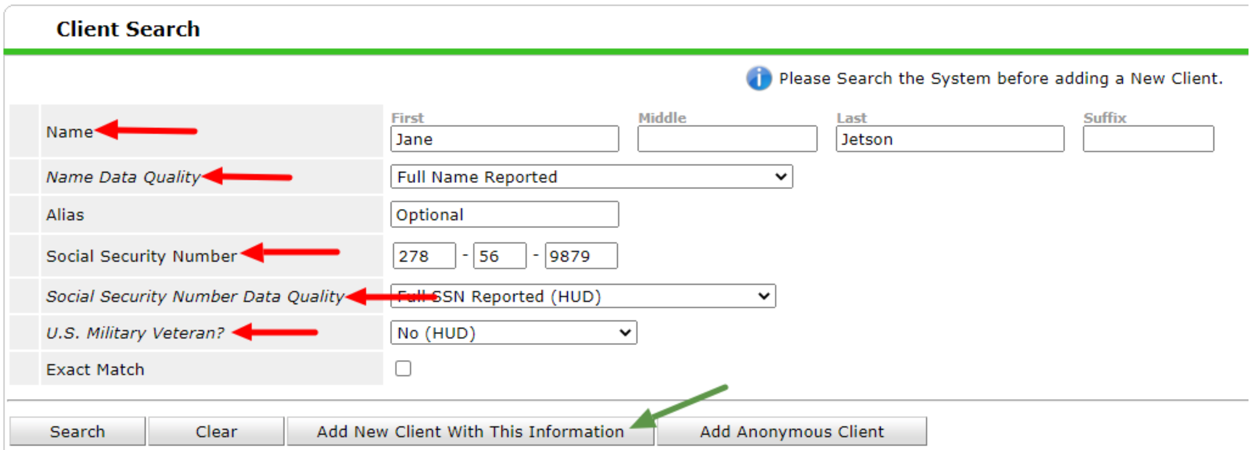


2. Search for your client by First and Last Name only, and then click their name or .



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 <u>absolutely required</u>!!!



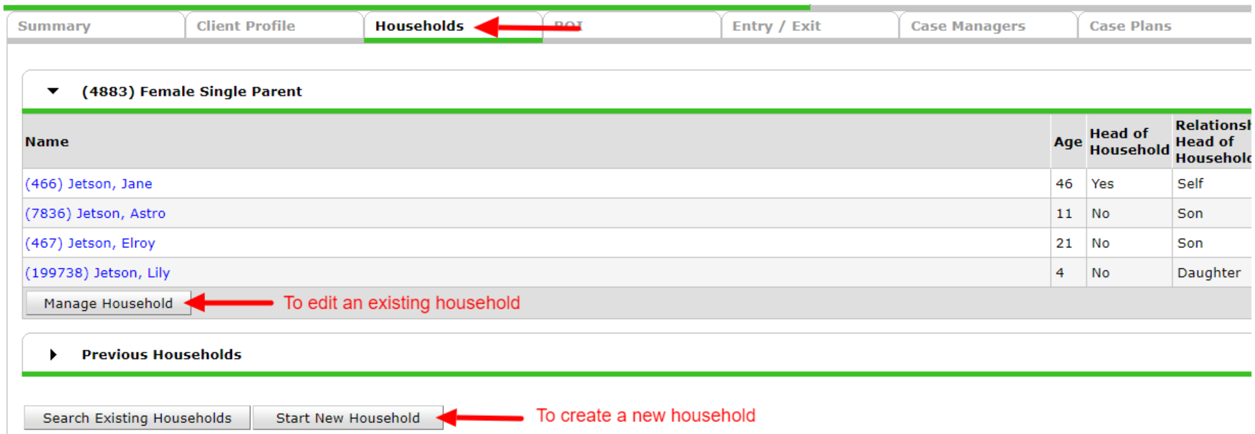
Households:

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.

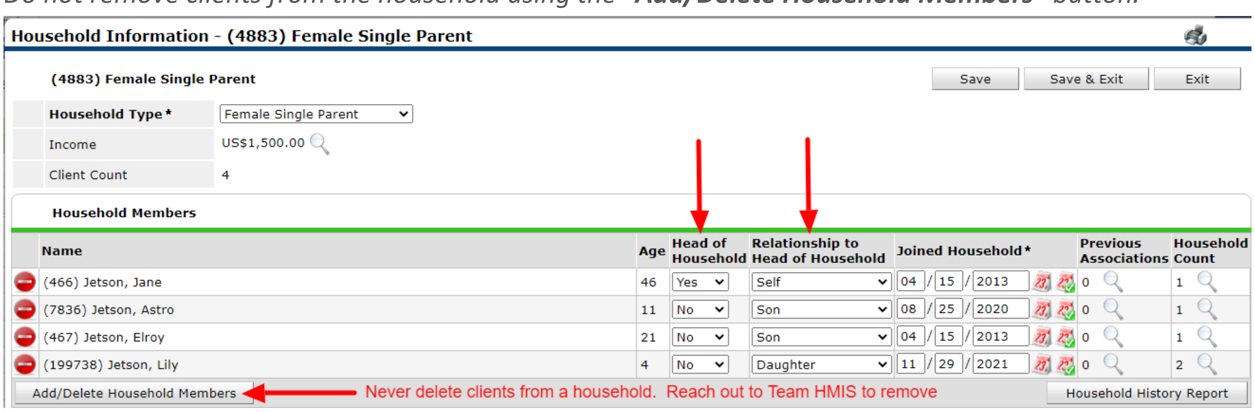
2. If no household is listed, create a new household by clicking "***Start New Household***."
   To complete/ update an existing household, click "***Manage Household***."

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.*

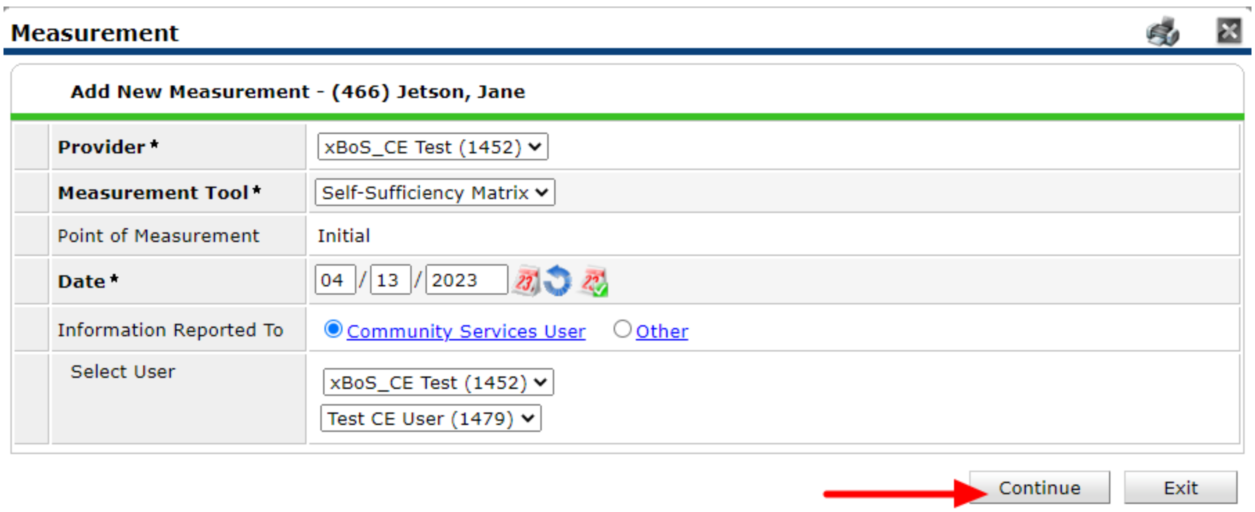


Initial SSM Measurement:

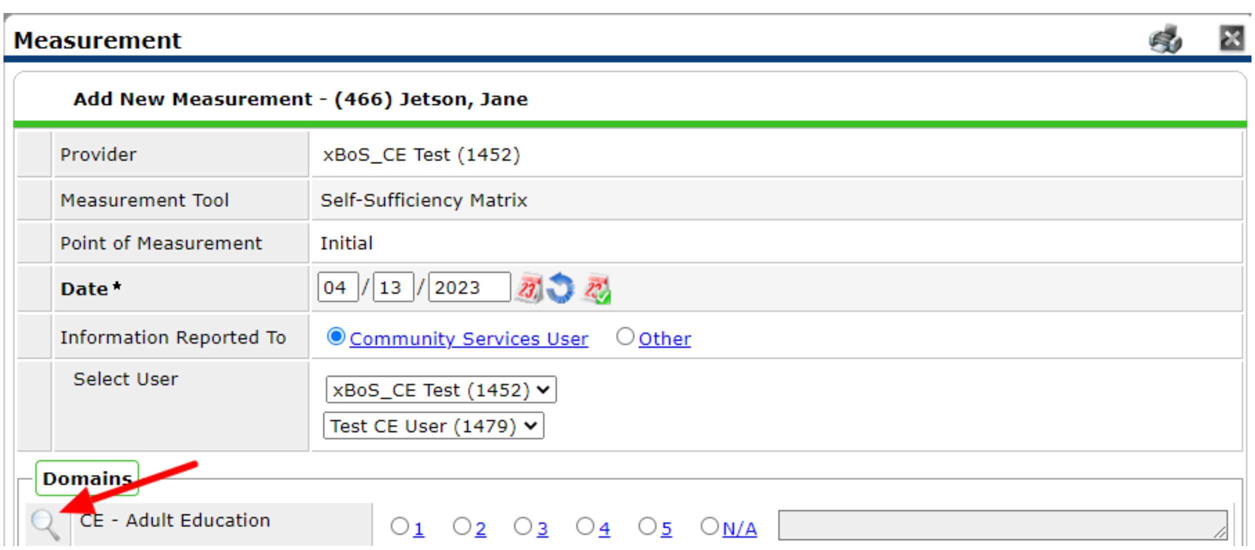
THIS STEP IS ONLY REQUIRED FOR HEAD OF HOUSEHOLDS.

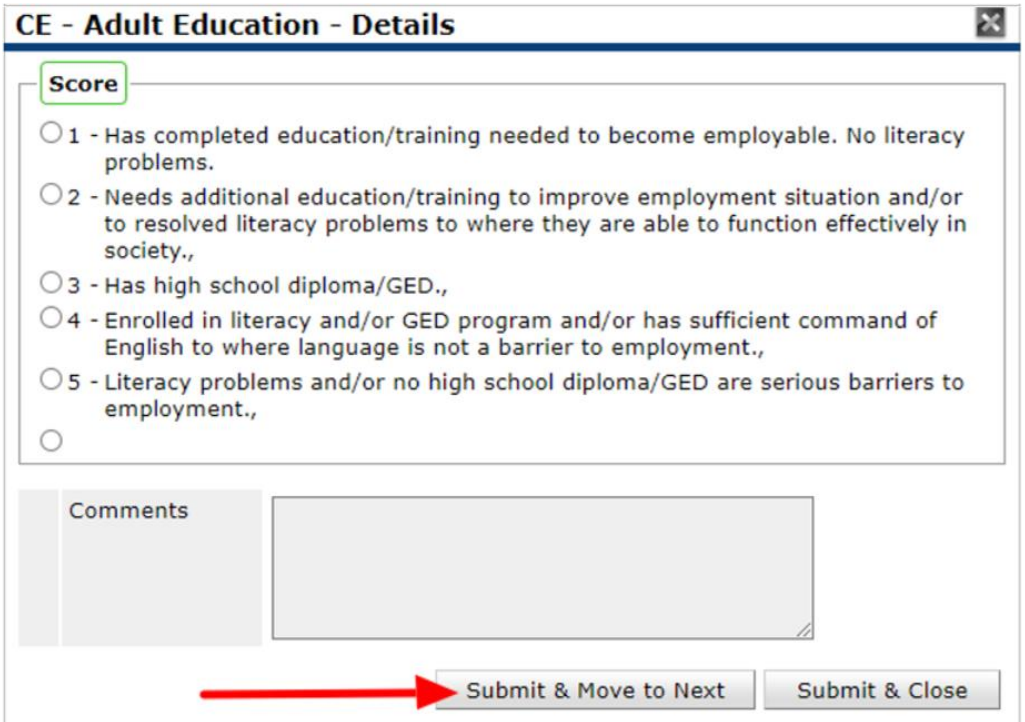
1. To create an Initial Measurement, go to the "Measurements" tab and click "Add New Measurement".

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



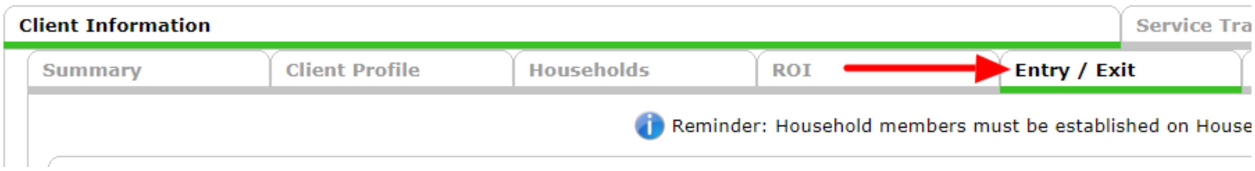
3. Click the magnifying glass on the first measurement to see the options to choose and then click "Submit and Move to Next" to complete the measurement.



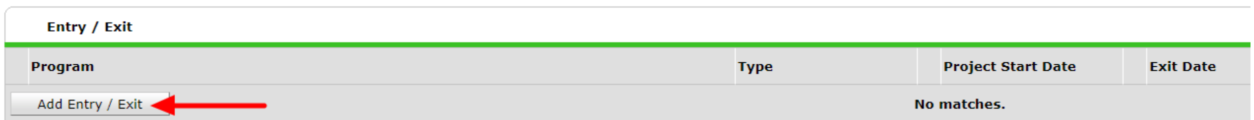

CE - Adult Education - Details
Score
1 - Has completed education/training needed to become employable. No literacy problems.
2 - Needs additional education/training to improve employment situation and/or to resolved literacy problems to where they are able to function effectively in society.,
3 - Has 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
Submit & Move to Next
Submit & Close

Entry Date:

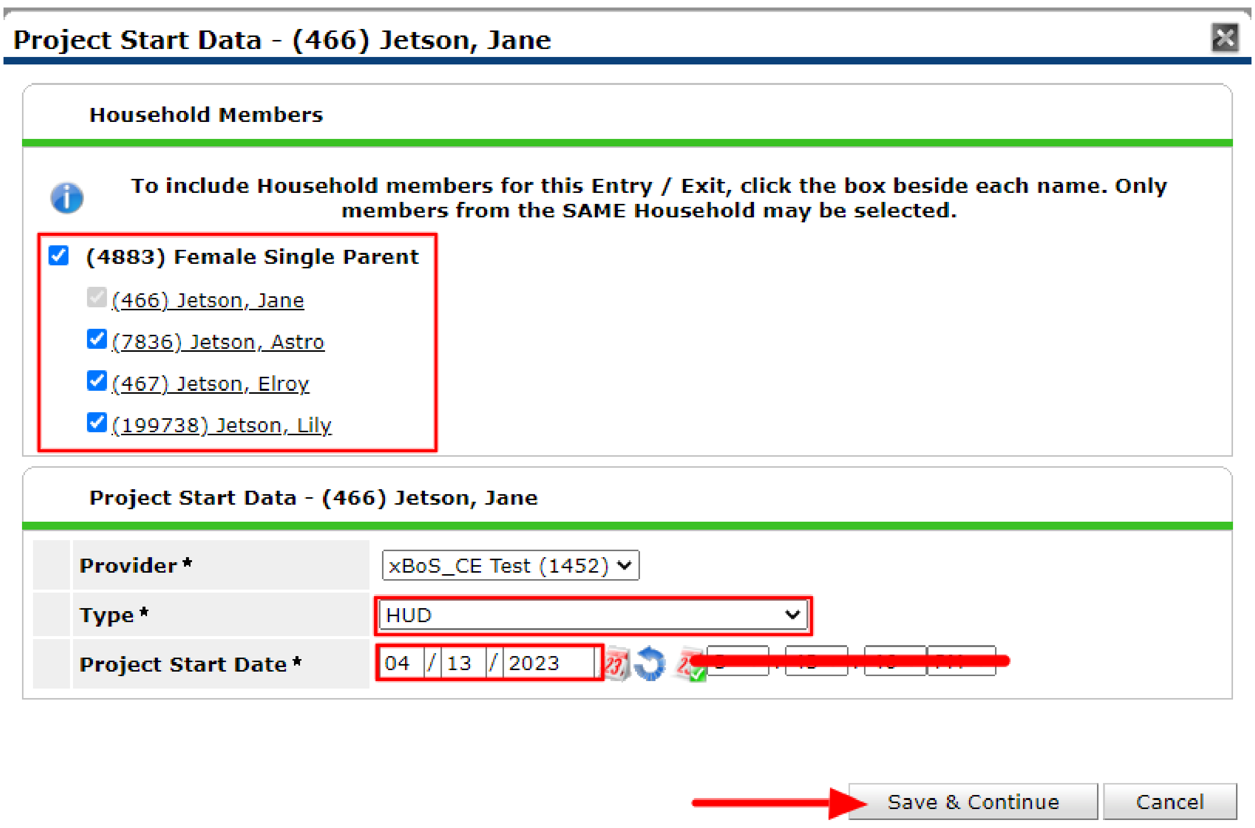
1. Click the "***Entry/Exit***" tab.



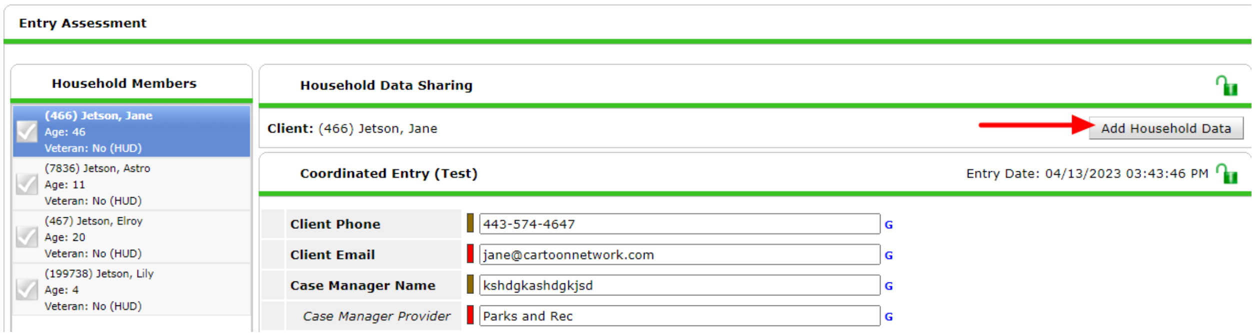
2. Click "***Add Entry/Exit.***"



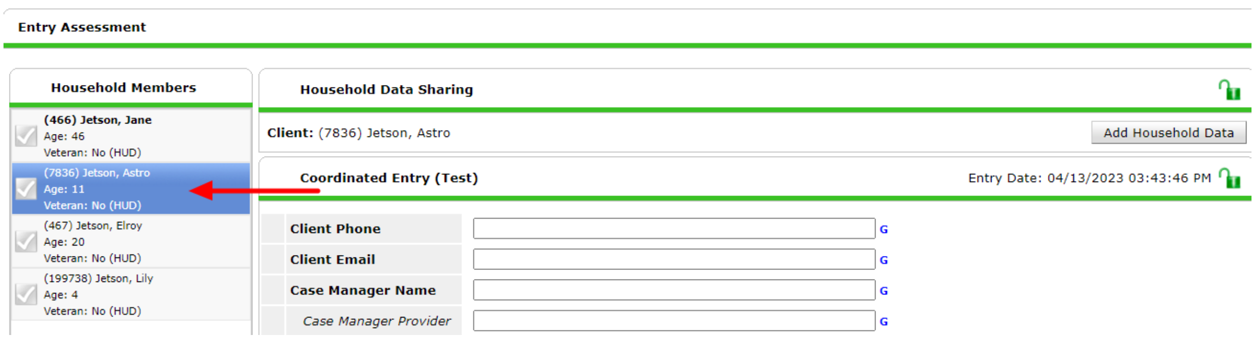
3. If applicable, select all household members entering with Head of Household (the head of household will be selected by default). The "***Type***" is always "***HUD.***" Enter your "***Project Start Date***". Always disregard time fields. Click "***Save & Continue***."



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:

Family Type*	Adults & Children G
Total Adults*	02 G
Total Children*	02 G
Household Size*	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

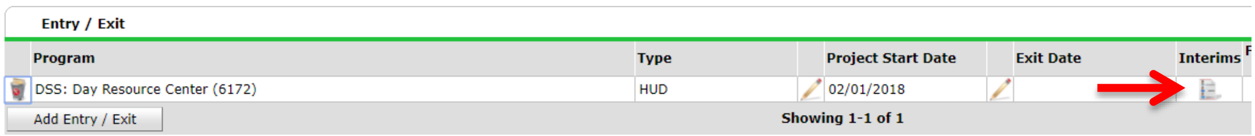
	Start Date*	Doc Type*
	07/08/2021	Verification Of Disability
	07/08/2021	Verification of Homeless Episodes Not in HMIS

Add **Showing 1-2 of 2**

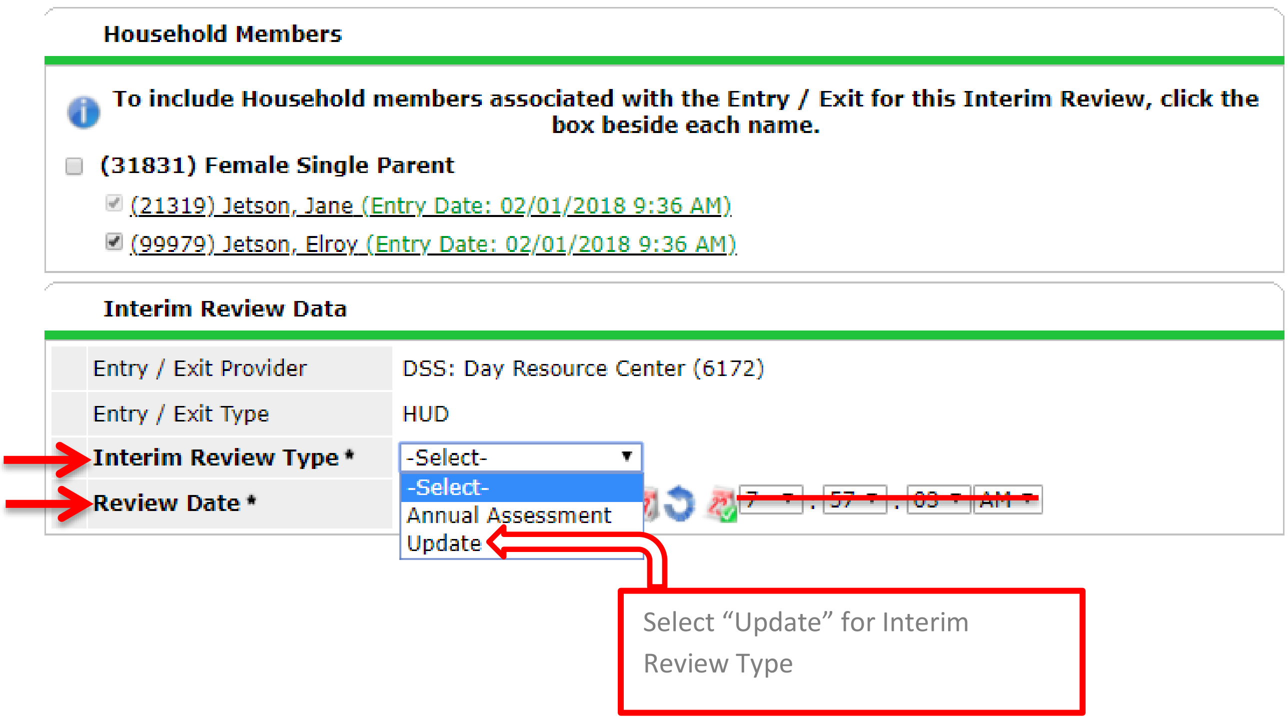
Interim SSM Measurement + Interim Review:

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.



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.

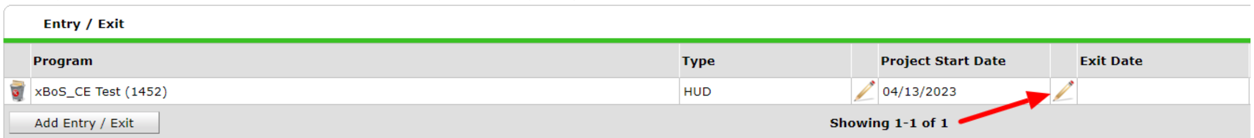


Final SSM Measurement + Exit Date:

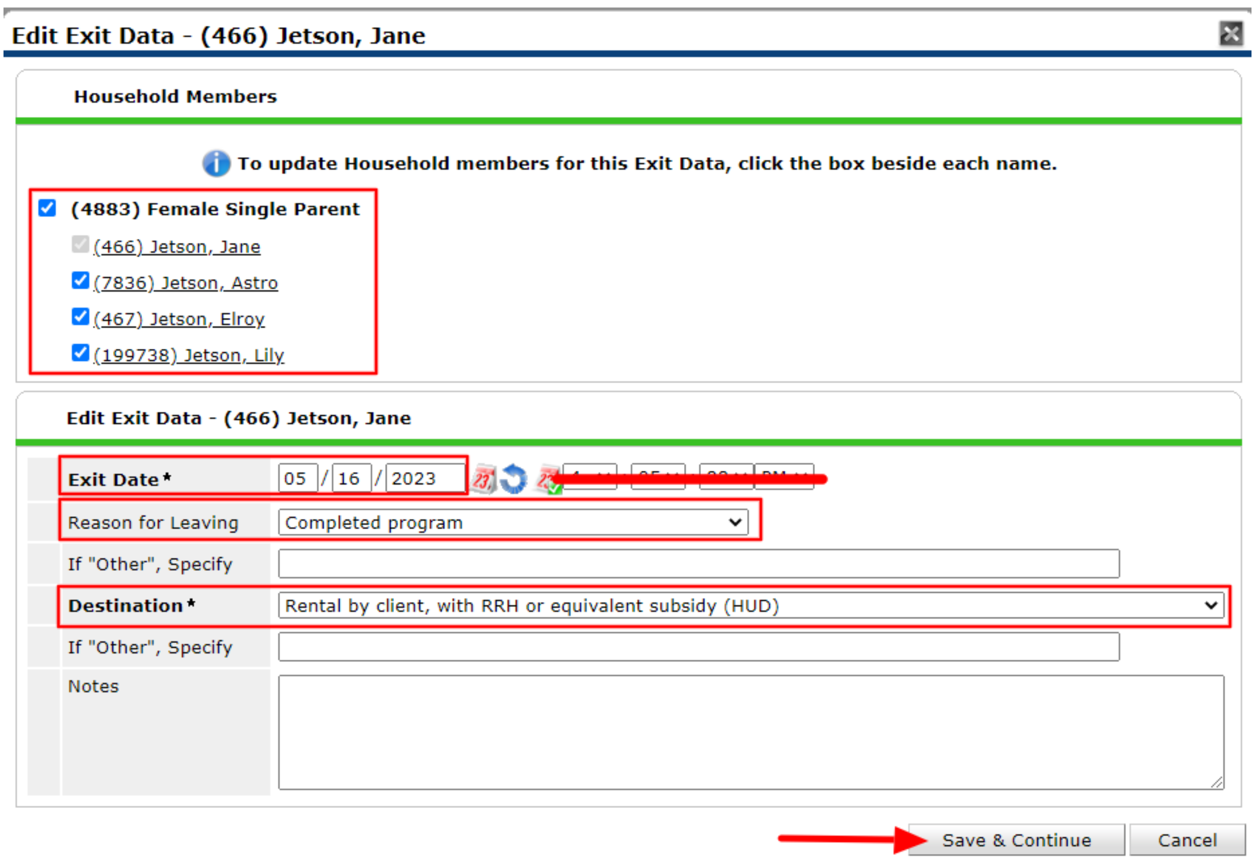
1. Create Final Measurement

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.



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



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.”***