HMIS Workflow:
Coordinated Entry / SSM's

Contents

Coordinated Entry + HMIS 101

To appear on an LHC's By-Name-List (BNL) the client who is the **HoH** ***must be*** **enrolled** into the LHC's *specific* HMIS Coordinated Entry project (see chart below). To do this the HMIS End User will:

1) **Select** '*Enter Data As*' (EDA) for the LHC's specific HMIS Coordinated Entry project
2) **Complete** these HMIS assessments
   - MD-514 Coordinated Entry Project: ENTRY Assessment (FY24)
   - Self-Sufficiency Matrix Assessment

HMIS Coordinated Entry Names & ID #'s

**** If you do not see your LHC's CE project in your EDA list – contact the HMIS Help Desk & request access****

LHC	HMIS Provider ID	Coordinated Entry Project Name
Allegany County	1466	AC: Coordinated Entry (CE)
Cecil County	1621	CC: Coordinated Entry (CE)
Frederick County	1681	FC: Coordinated Entry (CE)
Garrett County	1465	GC: Coordinated Entry (CE)
Harford County	1437	HC: Coordinated Entry (CE)
Southern Maryland	1630	SM: Coordinated Entry (CE)
Washington County	319	WC: Coordinated Entry (CE)

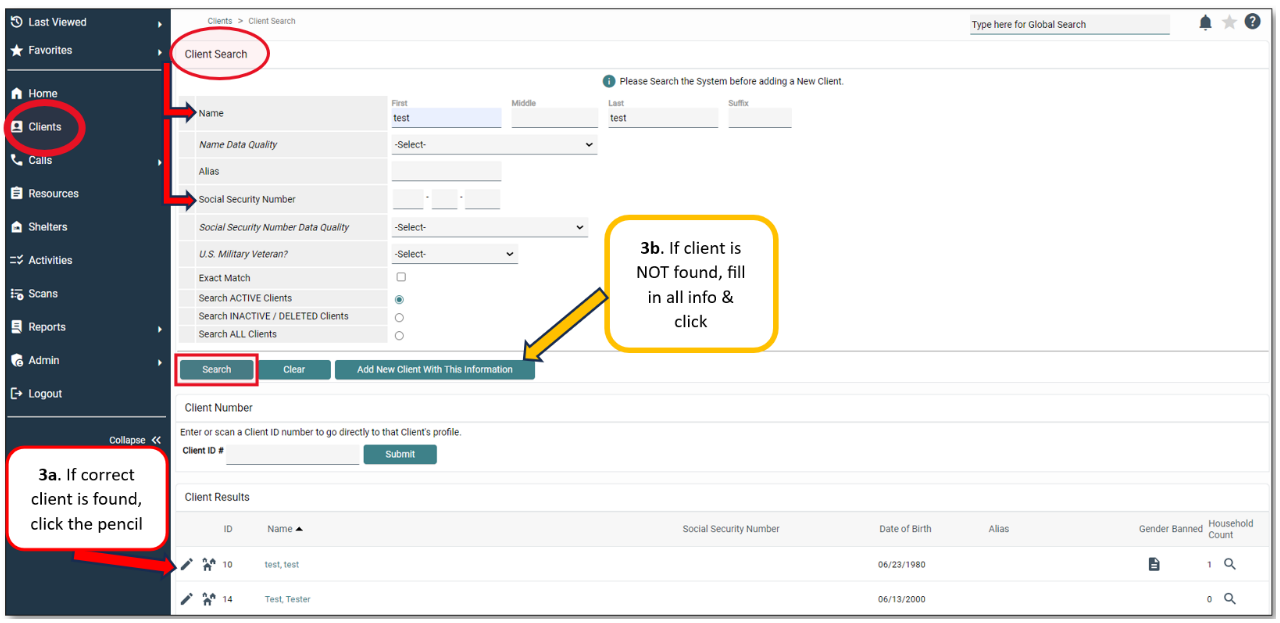
Enrolling Client into the HMIS Coordinated Entry Project

A. *Home Dashboard*

1. Log into HMIS
2. Click **Enter Data As** then click the plus next to the ***specific LHC Coordinated Entry project*** for which you are entering data
3. If needed – Set **Back Date Mode** for the date that the update was completed

B. *Client Search*

1. Click on **Clients**
2. Enter ***Head of Household*** (HoH) Name &/or partial SSN
3. Click **Search**
   a. If a match is found, confirm the details match the client's name, date of birth, and social security number. If it is the same person, click on the **pencil** to the left of the client's name
   b. If no matches are found, try at least two other ways to search for the client (partial name, alias, or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, and click **Add New Client with This Information**

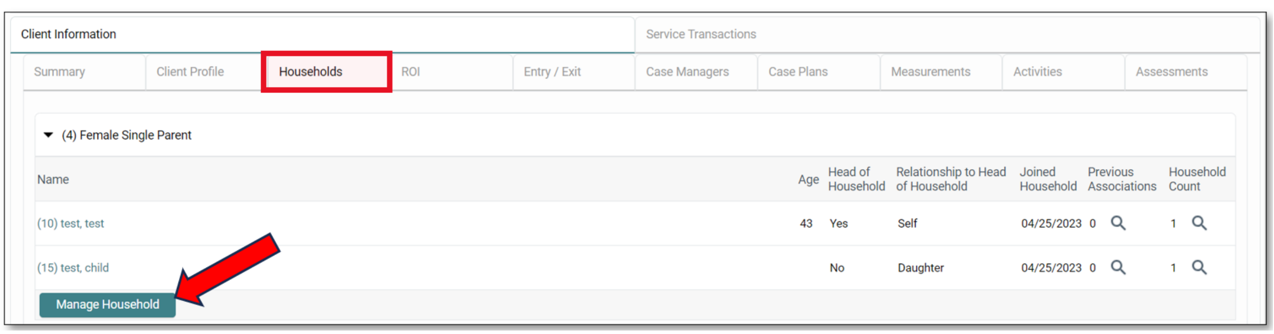


C. *Households Tab*

NOTE:

- Although ***only*** the person designated in HMIS as the ***HoH is enrolled*** into the HMIS CE project, ***ALL*** members of the household need to be included on the '*Households*' tab!
    - This way when reviewing clients on the BNL, if needed, EUs can view all HH members in HMIS that need to be housed with the HoH
- If the client is presenting as a single client, skip this section

1. Click on **Households** tab
2. If ***no*** household appears, click **Start New Household**
    a. Select appropriate **Household Type**
    b. Search for additional household member(s)
        - Enter another household member's Name
        - Click **Search**
            - If a match is found, confirm the details match the household member's name, date of birth, and social security number. If it is the same person, click on the **plus** to the left of that client's name
            - If no matches are found, try at least two other ways to search for the client (partial name, alias or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, and click **Add New Client with This Information**
    c. Repeat the search until all household members are listed in the "Selected Clients" section
    d. Click **Continue**
    e. Select **Head of Household** and **Relationship to Head of Household** for each Household member from the table at the top
    f. Click **Save & Exit**
3. If a household ***does show*** on this tab, verify/update household details by clicking **Manage Household**



    a. Verify **Household Type**
        ➢ **NOTE!** Do this for **every** HH member
    b. Remove household member(s) by clicking the red circle next to their name
        ➢ **NOTE!** ***Do NOT*** remove clients by clicking **Add/Delete Household Members**
    c. Add household member(s) by clicking **Add/Delete Household Members**
        - Click the arrow to expand **Add Clients to the Household** section

- Search for additional household member(s)
  - Enter another household member's Name
    - Click **Search** (**NOTE!** Same steps as done above in Step B)
      - If a match is found, confirm the details match the household member's name, date of birth, and social security number. If it is the same person, click on the **plus** ⊕ to the left of that client's name
      - If no matches are found, try at least two other ways to search for the client (partial name, alias or full SSN). If still no matches are found, add the additional client information including full name, name data quality, SSN, SSN data quality, and veteran status, and click **Add New Client with This Information**

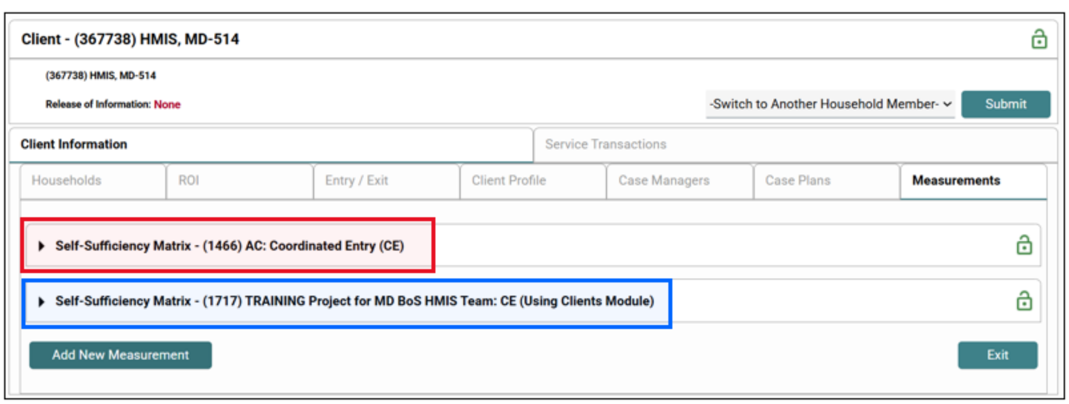
- Repeat until all household members are listed in the "Select Clients" section
- Click **Continue**

d. Select **Head of Household** and **Relationship to Head of Household** for each Household member from the table at the top.

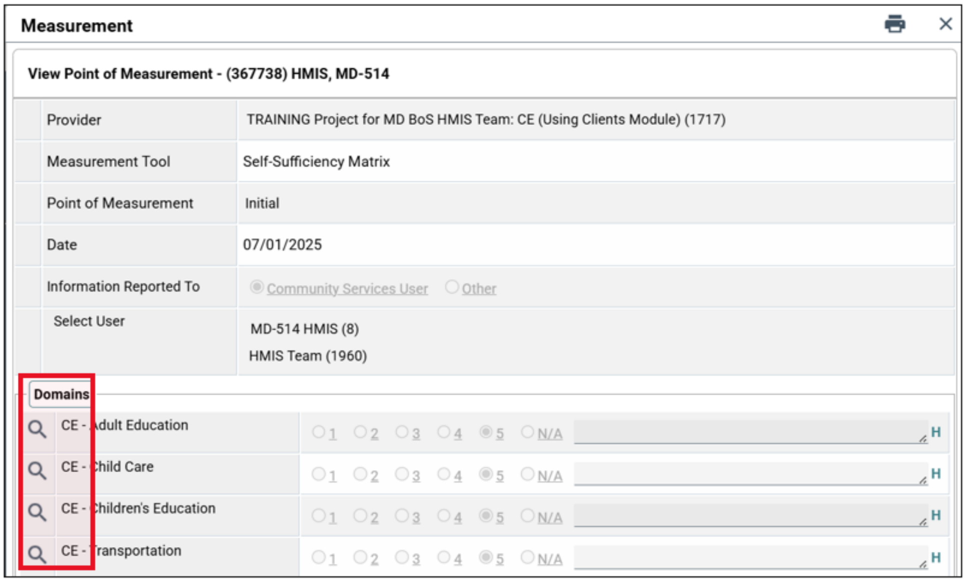
e. Click **Save & Exit** once complete

D. *Measurements Tab / Self-Sufficiency Matrix (SSM)*

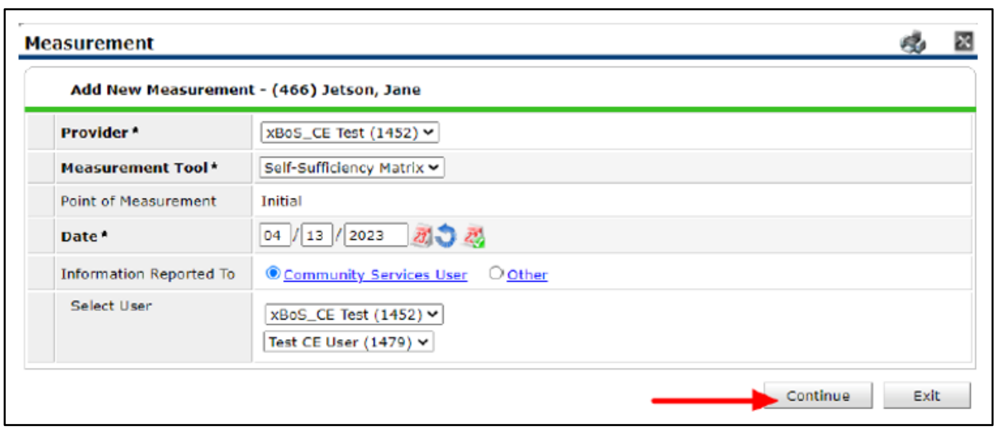
- If a client has had previous SSM assessments completed by a different LHC Coordinated Entry project, you will see them listed separately by each CE projects name – click the arrow to see each individual SSM completed by the CE project.



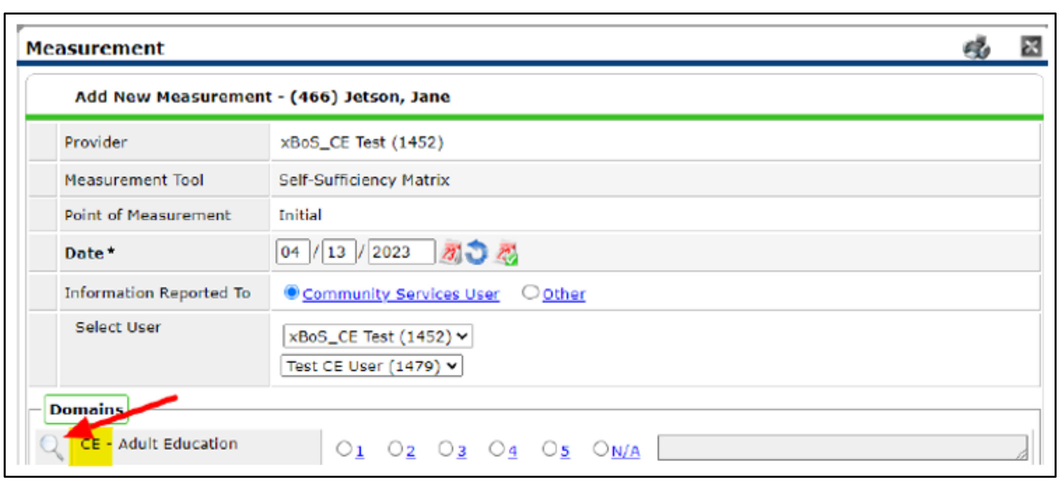
- The SSM for Coordinated Projects will have '***CE***' next to each individual '***Domain***' name
  - If you **do NOT** see '***CE***' that indicates that you have not selected an HMIS Coordinated Entry project for '***Enter Data As***'



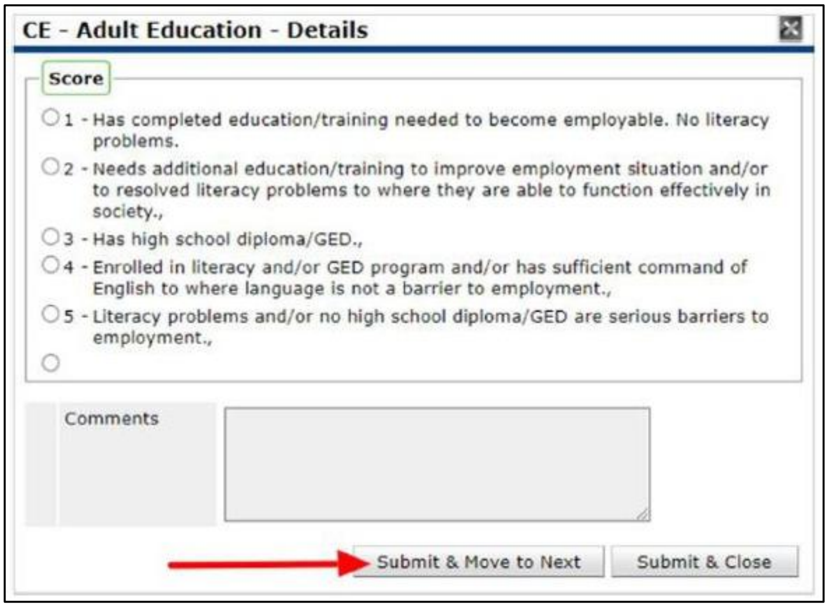
1. To create an initial measurement, go to the ***Measurements*** tab
2. Click **Add New Measurement**
   a. By default the *Point of Measurement* will be '*Initial*'
3. Click ***Continue***



4. Click the magnifying glass on the first measurement to see the expanded information for each domain

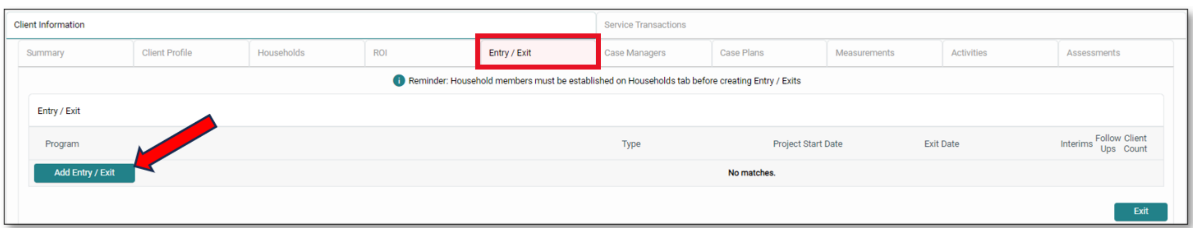


5. Click **Submit & Move to Next** as you complete entering the measurement

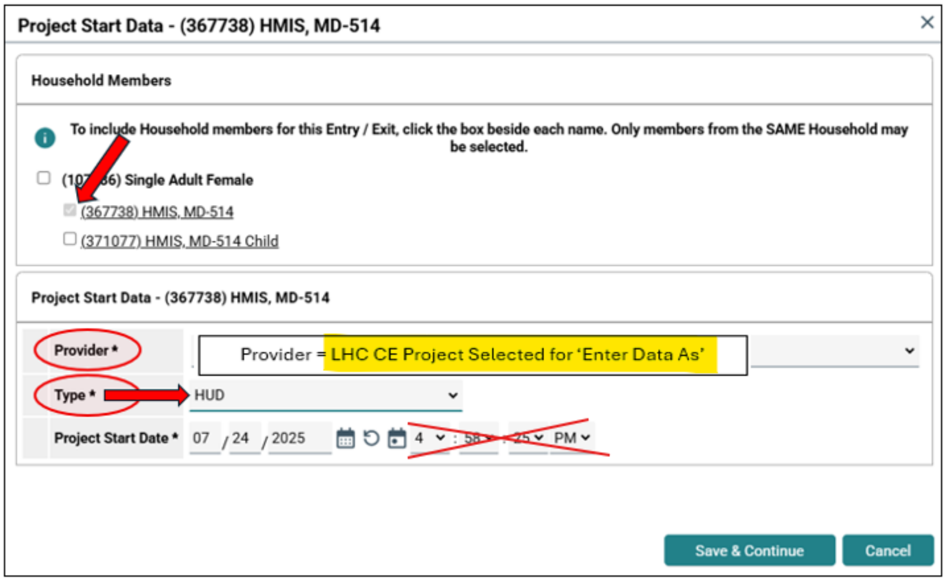


E. *Entry Assessment*

6. Click on the **Entry/Exit** tab
7. Click **Add Entry/Exit**



8. Confirm Project Start Data
   a. ***Only*** the HoH's name should be selected
   b. Confirm the ***Provider*** listed is correct
      - This should be the LHC Coordinated Entry projects *selected for Enter Data As when first logging into HMIS. If the provider is not correct, click Cancel. Set the Enter Data As and re-search for the head of household*
   c. ***Type***:
      - Select '***HUD***' for the Type
   d. Confirm the **Project Start Date**
      - **Do NOT** change the time fields
   e. Click **Save & Continue**

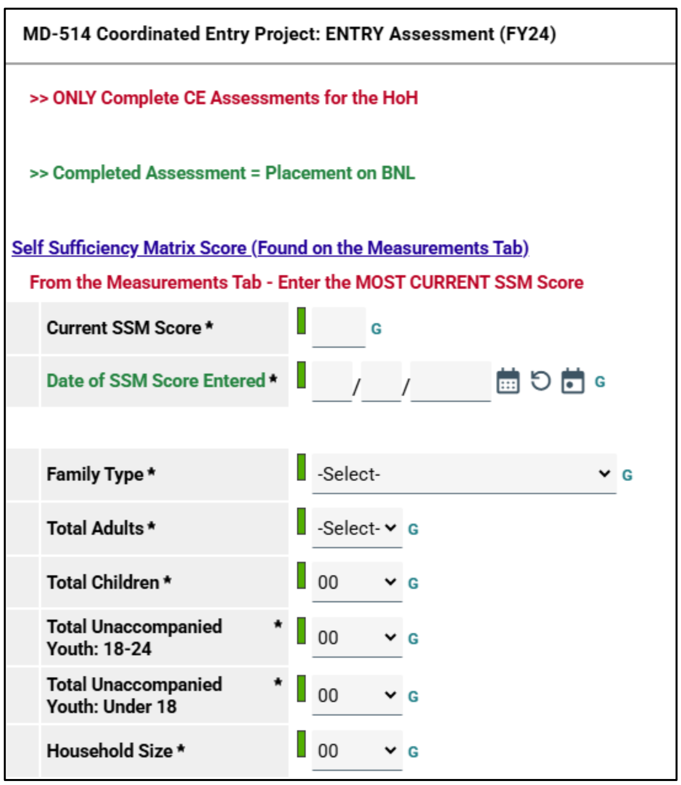


9. Complete the ***MD-514 Coordinated Entry Project: ENTRY Assessment***

   To ensure that information is accurate on the BNL, **ENTER** the:

   a. **SSM score** that you just completed on the *Measurements* tab

   b. **Family Composition** information

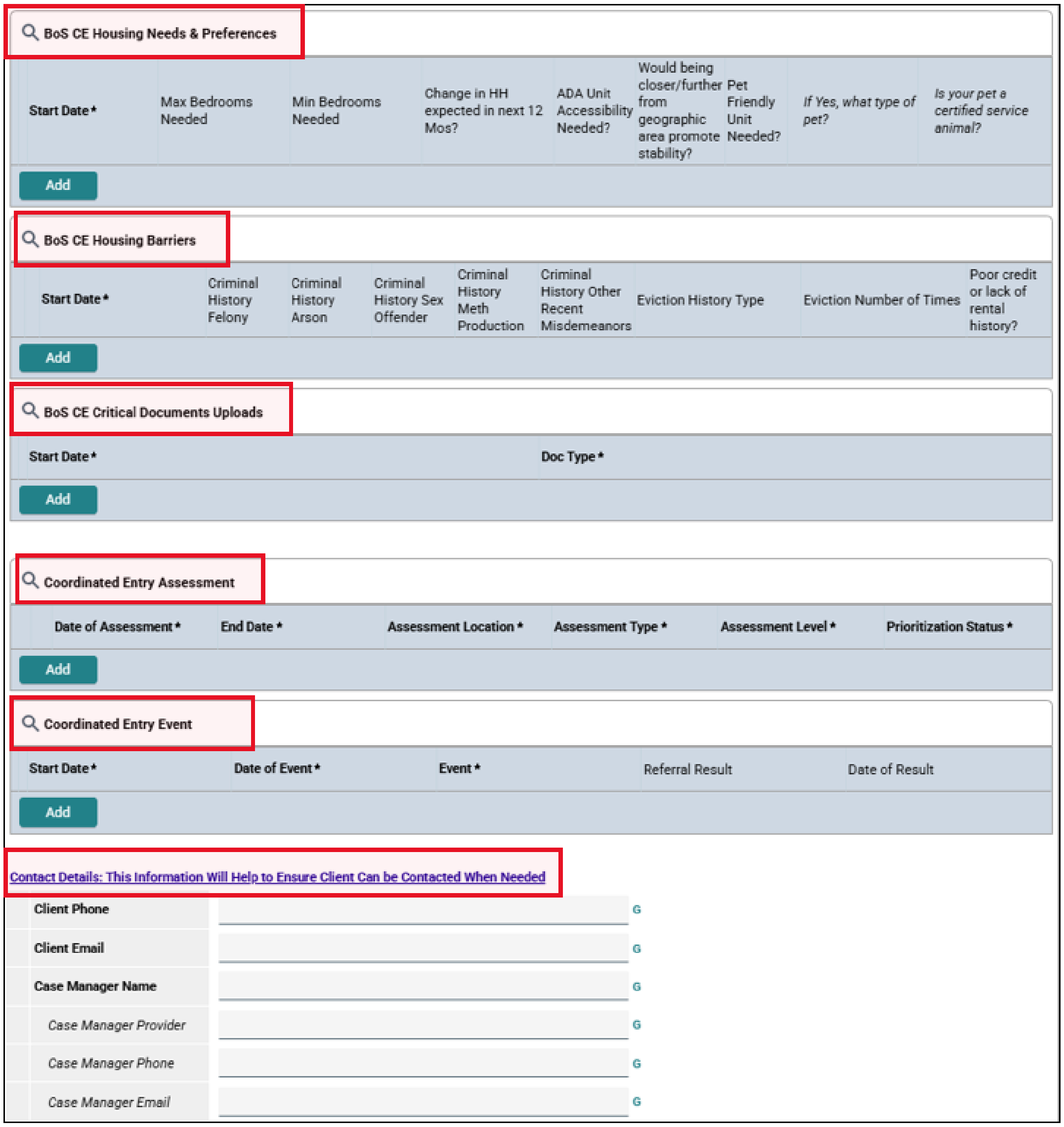


   c. Complete the rest of the assessment for the HoH – ***updating*** any information previously entered

   d. These data elements ***must be completed*** in order to identify the appropriate next steps & verify housing needs

      - BoS CE Housing Needs & Preferences
      - BoS CE Housing Barriers
      - BoS CE Critical Documents Uploads

- Coordinated Entry Assessment
- Coordinated Entry Event
- Contact Details



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?*

Add

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?

Add

BoS CE Critical Documents Uploads

Start Date *	Doc Type *

Add

Coordinated Entry Assessment

Date of Assessment *	End Date *	Assessment Location *	Assessment Type *	Assessment Level *	Prioritization Status *

Add

Coordinated Entry Event

Start Date *	Date of Event *	Event *	Referral Result	Date of Result

Add

Contact Details: This Information Will Help to Ensure Client Can be Contacted When Needed

Client Phone	G
Client Email	G
Case Manager Name	G
Case Manager Provider	G
Case Manager Phone	G
Case Manager Email	G

Client Interim (Update/Annual Assessment)

NOTE:

- **At minimum** an Interim / Update assessment **must be completed once** ***EVERY 90-Days*** for HoH to remain active on the BNL
- If you are completing an Interim CE assessment – you will likely need to also do an ***Interim Self-Sufficiency Matrix*** assessment to update the HoH score on the BNL

A. Home Dashboard

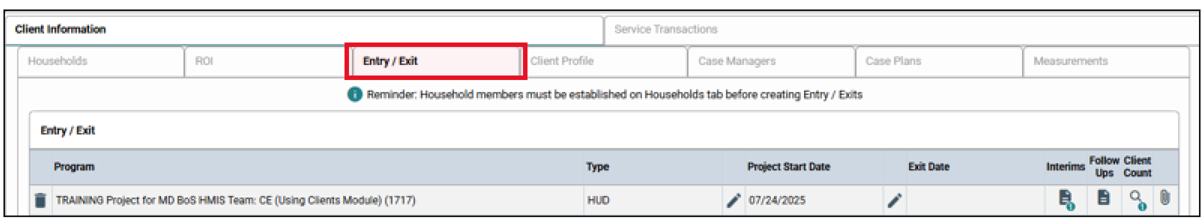
1. Log into HMIS
2. Click **Enter Data As** then click the plus next to the ***specific LHC Coordinated Entry project*** for which you are entering data
3. If needed - Set **Back Date Mode** for the date that the update was completed

B. Client Search

1. Click on **Client**
2. Enter the head of household's HMIS ID number or search by the head of household's name

C. Interim Assessment

1. Click **Entry/Exit** tab
2. Click **Interim** icon on the LHC's CE project's row



3. Click **Add Interim Review**

4. Complete the Interim ***MD-514 Coordinated Entry Project Update/Annual Assessment***
   a. Select the **Interim Review Type**
      - **Update**: completed anytime information has changed since project entry
      - **Annual Assessment**: required assessment for all clients remaining in a project after one year; Annual Assessments must be completed within 30 days before or after the Head of Household's project start anniversary date (example: if the HoH entered the project on 3/17/2022, the Annual Assessment would need to be completed between 2/15/2022 and

4/16/2023)

b. Confirm the **Review Date**

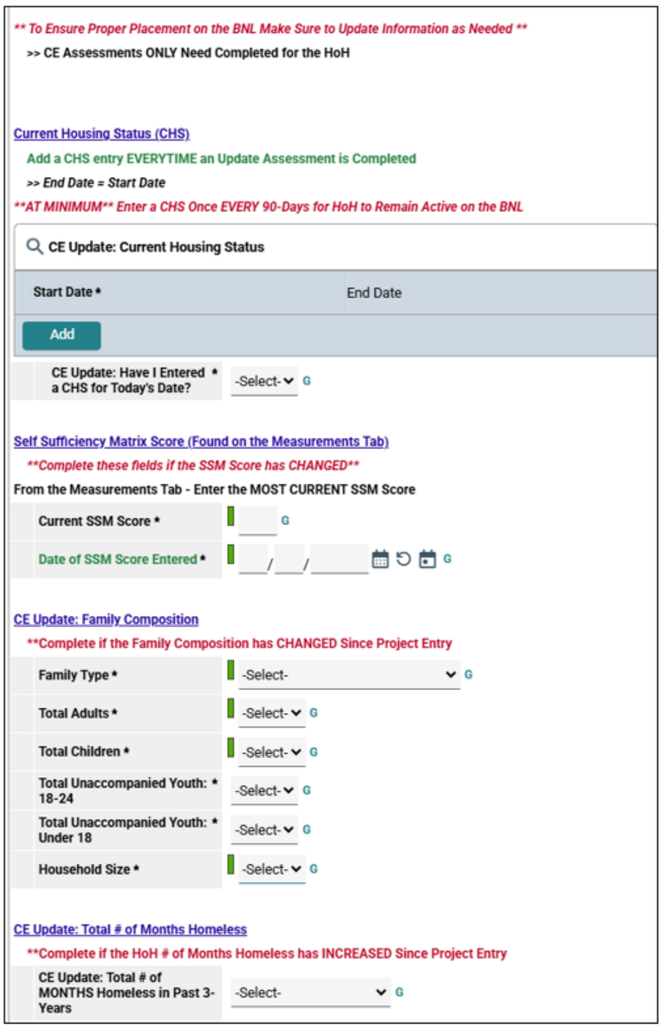
c. Click **Save & Continue**

5. Update assessment information as necessary

   a. At minimum, the '***Current Housing Status***' data element must have response recorded once ***EVERY 90-days*** in order for the HoH to remain active on the BNL

   b. If applicable, based on changes to the client situation/circumstances, ***update*** other data elements, such as the:

      - Self-Sufficiency Matrix Score
      - Family Composition
      - Total # of Months Homeless



6. Click **Save & Exit**

Client Exit

A. *Home Dashboard*

1. Log into HMIS
2. Click **Enter Data As** then click the plus next to the ***specific LHC Coordinated Entry project*** for which you are entering data
3. If needed - Set **Back Date Mode** for the date that the client exited the CE project

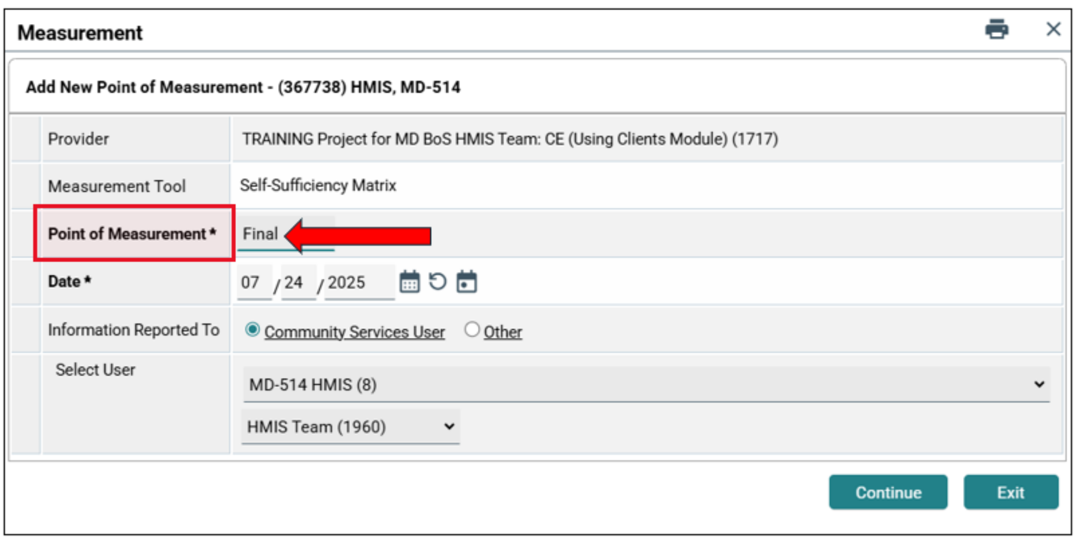
B. *Client Search*

1. Click on **Client**
2. Search for the client that is exiting the project (name search or HMIS ID search)

C. *Measurements Tab / FINAL Self-Sufficiency Matrix (SSM)*

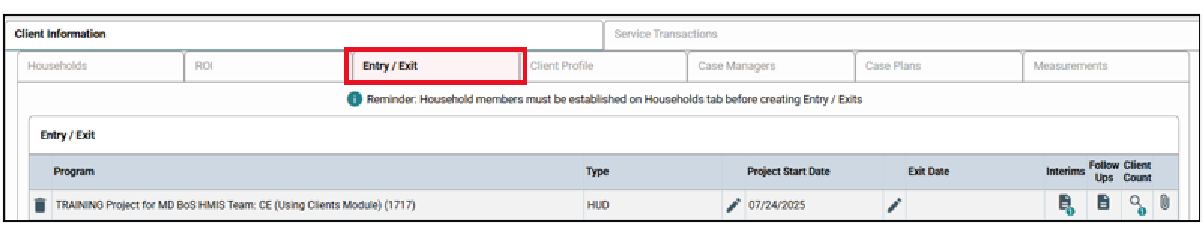
NOTE:

- When a client EXITS the LHC's Coordinated Entry project – you must also complete a ***FINAL Self-Sufficiency Matrix*** assessment



D. *Exit Assessment*

1. Click **Entry/Exit** tab
2. Click the pencil next to the Exit Date column within the LHC's CE project's row



3. Complete Exit Data
   a. Confirm the **Exit Date**
   b. Select **Reason for Leaving**

c. Select **Destination**

d. Click **Save & Continue**

4. Complete the ***MD-514 Coordinated Entry Project: EXIT Assessment***
5. Click **Save & Exit**