

Instructions for HMIS Entry Point Assessment Progress Tracker

The HMIS Entry Point Assessment Progress Tracker is the mechanism that initiates the housing process for your clients. **The Entry Point team will not be able to match clients to resources if a Progress Tracker has not been initiated.** The Progress Tracker not only tracks client status in the Coordinated Entry process, it also enhances coordination and information sharing between staff in Suburban Cook agencies eliminating redundant work and will help staff more quickly locate and efficiently communicate with clients in the housing process. The HMIS Entry Point Assessment Progress Tracker is used in conjunction with the Entry Point Phased Assessment documents (available on Entry Point website).

The following instructions outline how to initiate and complete an HMIS Entry Point Assessment Progress Tracker. Parts 4, 5, and 6 EPPA refer to corresponding sections of the Entry Point Phased Assessment (EPPA).

Step 1: Determination of Housing Interest

Parts 1, 2, and 3 EPPA (Safety Screen, HMIS Initial Intake, Child and Family Needs Assessment) are completed for all individuals upon entry to any homeless project regardless of whether they want assistance securing stable housing. The HMIS Entry Point Progress Tracker process begins by identifying whether the household wants to be assessed for housing.

Timeline tip: Entry Point guidelines state that case managers should begin the housing assessment process:


- As soon as clinically appropriate for all chronically homeless individuals, all households with minor children, TAY households, and other extremely vulnerable individuals.
- No sooner than 7 – 14 nights of stay/services/contacts for all other individuals

First, check the Client Profile tab of the client's record in HMIS to see if an open Progress Tracker record exists. (An open Progress Tracker will not have an end date).

- If an open Progress Tracker record exists, this means another sending agency has already started the housing assessment process. Do not proceed with a new housing assessment. Work with the current sending agency and provide any assistance needed to help with documentation. Also, see step 3B.4. below to add contact information to the Progress Tracker.
- If an open Progress Tracker record does not exist, proceed with Part 4A EPPA, Housing Interest and Vulnerability Assessment.

Second, Part 4A EPPA asks if the individual is interested with assistance securing stable housing. The individual's response should be recorded in HMIS in the Housing Interest/VI-SPDAT Status assessment on the Client Summary Page.

The screenshot below demonstrates this process.

SubCook Client Summary 

Outreach [View Housing Interest Status](#)

Date of Contact	Staying on Street, ES, or SH	Actual Location of Contact	Contact Notes	Start Date *
<input type="button" value="Add"/>				

----- Housing Interest/VI-SPDAT Information -----

Housing Interest/VI-SPDAT Status

Housing Interest/VI-SPDAT Assessment Date *	Assessing Agency	Assessment Project Type	Assessor Name	Housing Interest Outcome	End Date
<input type="button" value="Add"/>					

To record the response:

1. Click 'Add'
2. Enter the date corresponding to the housing conversation
3. Select your Agency or Walk-in Center from the pick list of Assessing Agencies
4. Select the type of project that initiated the housing conversation. Options are:
 - a. Day Center
 - b. Outreach
 - c. Shelter
 - d. Walk-in Center
5. Enter the name of the worker who completed the VI-SPDAT or had the housing conversation with the individual
6. Indicate the individual's response. Options are:
 - a. VI-SPDAT completed – Used to indicate client is interested in being consider for housing intervention. Complete CE Consent and appropriate VI-SPDAT.
 - b. Client is not interested in housing at this time.
 - c. Client is unable to complete the assessment – Use this to indicate the worker tried to discuss housing interest, but the client is unable to engage enough to complete the assessment.
7. Leave End Date blank.
 - a. End Date should be left blank (indicating this is the current status of the individual's housing interest).
 - b. If/when housing interest is revisited or a new VI-SPDAT is completed, a new Housing Interest record should be added and an End Date added to the prior record.

If a client has declined interest in housing, agencies should regularly revisit the conversation so they can work with the client when they are interested. However, indicating this response in HMIS will prevent a client from repeatedly showing up on missing VI-SPDAT reports.

If a client is unable to complete the assessment, agencies should contact the Entry Point lead team for further guidance.

If a client wants to be considered for housing, continue by obtaining the CE VI-SPDAT Consent and completing the appropriate VI-SPDAT.

Step 2: CE-Consent and VI-SPDAT

If a client wants to be considered for housing, proceed with Part 4B EPPA, Vulnerability and Severity of Service Needs. Complete the steps below:

1. Obtain signed CE Consent
2. Complete the appropriate VI-SPDAT
3. On the Client Summary page, record confirmation of CE Consent and results of the VI-SPDAT in HMIS
4. Unlock the VI-SPDAT to 'Alliance Projects'
 - a. This lock is the lock to the right of the SubCook Client Summary
 - b. See the Alliance website > HMIS > Walkthrough Videos for a short video walkthrough of this process
5. Upload the CE Consent as a File Attachment on the Client Profile page
6. Unlock the CE Consent to 'Alliance Projects'
 - a. See the Alliance website > HMIS > Walkthrough Videos for a short video walkthrough of this process
7. In the rare occurrence when a client may be willing to do a VI-SPDAT but is unwilling to sign the CE Consent, please contact the Entry Point team for further guidance.
8. Begin the Entry Point Assessment Progress Tracker.

Step 3: HMIS Entry Point Assessment Progress Tracker

After completing the above steps, information can now be entered into the HMIS Entry Point Assessment Progress Tracker.

Process Reminder: The HMIS Entry Point Assessment Progress Tracker should only be initiated for clients that are:

1. Literally homeless
2. Have expressed an interest in being considered for a housing intervention
3. Have a signed and uploaded CE Consent


Step 3A: Check client's visibility setting


The Progress Tracker is designed to share the information with all agencies in suburban Cook but clients who are locked down will not be visible to other agencies or the Entry Point team. Please verify that a client's record is only locked down because the specific situation warrants, such as fleeing domestic violence. If the record needs to remain locked down and the client has signed CE Consent, contact the HMIS team at the Alliance for instructions.

To check a client's currently visibility setting:

1. Look at the lock at the top of the client's HMIS record.
2. If the red lock is closed, the client record is locked and should be unlocked
 - a. Click the red lock
 - b. Click 'Add Visibility Group'

- c. Search for the appropriate visibility group.
 - i. If the client has signed Profile Plus or Profile only HMIS consent, Search for 'Regional Global'.
 - ii. If the client has denied sharing for HMIS consent, search for 'Alliance Projects'.
- d. Click the green + sign and Exit.
3. If you see 'restricted', please submit a Cayzu ticket for the HMIS team at the Alliance for assistance.


Client - (115) peel, lemon Mass Visibility Update 


 (115) peel, lemon
Release of Information: **None**

Client Information **Service Transactions**

Summary | Client Profile | Households | ROI | Entrv / Exit | Case Managers | Case Plans | Measurements | Assessments | Activities

Step 3B: Start the HMIS Entry Point Assessment Progress Tracker - found on the Client Profile tab

SubCook Client Profile 

 **Entry Point Assessment Progress Tracker**

Entry Point Progress Tracker Start Date	* Entry Point Sending Agency (SA)	Vulnerability and Severity of Service Needs Assessment-Date Uploaded into HMIS	Agency Completing VI-SPDAT assessment	Homelessness History Verification-Date All Docs Uploaded into HMIS	Entry Point Progress Tracker-Reason Closed	Tracker Date Closed
<input type="button" value="Add"/>						

To begin an HMIS Entry Point Assessment Progress Tracker, click 'Add'. Complete as much of the Progress Tracker as possible based on the information gathered to date – **do not wait to initiate the Progress Tracker until all items are complete**. Some specific questions are outlined below.

1. **HMIS Entry Point Progress Tracker Start Date** – This will default to the current date. It should represent the date the individual began the process – the date the client agreed to be considered for housing intervention, signed the CE Consent, and completed the VI-SPDAT.
2. **Initiating Agency** – Select the access point from the pick list. This should be the same access point that completed the VI-SPDAT.
3. **Sending Agency** – The sending agency will be responsible for staying in contact with the client and take the lead in obtaining required documentation. Select the Sending Agency from the pick list. Complete contact information for the staff member most closely working with the client.
4. **Agency 2** – When an agency is working with a client that already has an open Progress Tracker, complete the Agency 2 information. Best practice should be to contact the Sending Agency Case Manager first so they know your agency is also working with the client. The two agencies may work together to complete documentation. It is also possible that the original Sending Agency has lost contact with the client and may agree to hand over the Sending Agency role. In this case, Agency 2 becomes the Sending Agency and the original Sending Agency would be Agency 2. The Progress Tracker record should be updated to reflect these changes.

5. **Receiving Agency** – Once a client has been referred to a housing project, the Receiving Agency enters their information in the Progress Tracker record by completing this section. This informs the Sending Agency who will be working with the client on the housing side.
6. **Chronic homelessness and disability information** – HMIS data must be reviewed to ensure the most recent project entry information is accurate and complete. Pay particular attention to disability and chronic homeless questions.
7. **Based on HMIS data, does client meet definition of chronic homelessness** – Based on your understanding of the client’s homelessness history and knowledge of HUD’s definition of chronic homelessness, indicate if you believe this client meets HUD’s definition of being chronically homeless. If the client meets HUD’s definition of chronic homelessness, but HMIS data does not support this, please correct the HMIS data. Contact HMIS staff if you need assistance.
8. **VI-SPDAT score** – Indicate the VI-SPDAT score under the appropriate question (Family, TAY or Individual). This allows other agencies working with the client to confirm that a VI-SPDAT was completed and that the score is consistent with their understanding of the client’s situation.
9. **Homelessness History Verification** – Indicate the date when all pieces necessary to verify the individual’s homeless history have been completed and uploaded to the client’s HMIS record.
10. **Part 6B, C, and D** – These questions relate to the corresponding sections in the Phased Assessment. If any question on the paper form is checked, then check the box for that section on the Progress Tracker. This will serve as an indication that additional factors for matching need to be taken into consideration.
11. **Entry Point Progress Tracker – Reason Closed** – When closing a Progress Tracker record, indicate the reason.
 - a. Once a client is housed, the receiving agency will close the Progress Tracker. Indicate reason = Permanent Housing or Temporary Housing. Also enter an End Date.
 - b. If a client is exiting an agency’s homeless project(s), the Sending Agency needs to determine if the Progress Tracker should be closed.
 - i. If there is no other agency listed as working with the client, enter the appropriate reason and an end date.
 - ii. If the client had been working with another agency (Agency 2), contact that case worker to confirm the client status with that agency. If the client is no longer being served by Sending Agency 1 but is active with another agency, then the Sending Agency and Agency 2 must be updated. In this case the Progress Tracker should not be closed.

Step 4: Uploading and Unlocking Documents

The Progress Tracker must be updated as agencies gather pieces of the Phased Assessment. The Phased Assessment documents must be uploaded to the client’s HMIS record and unlocked to ‘Alliance Projects’. There is a short video illustrating how to upload and unlock documents on the Alliance website as well as a separate instruction page for uploading an unlocking Entry Point Documents.