

# HOW TO RECORD A CES RELEASE OF INFORMATION DATE IN HMIS

Clients participating in Hennepin County’s Coordinated Entry System should complete a CES Release of Information (ROI); this ROI is different than the standard HMIS Release of Information. The date that the CES ROI was completed must be entered into HMIS. Optionally, an agency can decide to upload a digital copy of the release into HMIS.

## RECORD A CES RELEASE OF INFORMATION DATE

There are two ways to record a *CES Release of Information Date*:

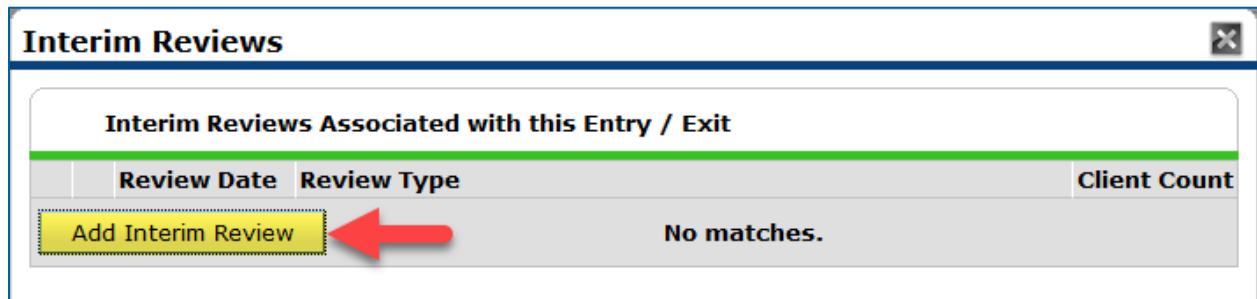
- As an interim update, if a client already had an open entry for provider 4314 or 4315 and the release of information was signed at a later date.
- Within the entry assessment, if a client is being added to the priority list and had not previously signed the release of information.

### INTERIM UPDATE: CLIENT SIGNED CES ROI AFTER ASSESSMENT

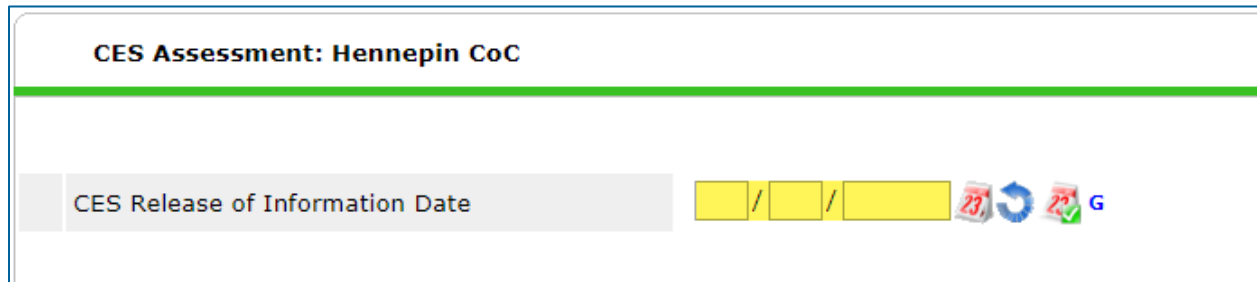
1. Click on **Enter Data As** and select your Coordinated Entry Assessment provider (4314 or 4315).
2. Open the client’s record. When prompted, select **Use Current System Date**.
3. Select the **Entry/Exit** tab and find the Coordinated Entry Assessment entry. You may have to scroll through the client’s Entry/Exit pages.
4. When you have found the Coordinated Entry Assessment entry, click on the **Interims** icon. The icon looks like a sheet of paper.

Exit						
	Type		Project Start Date		Exit Date	Interims
Singles Coordinated Entry Assessment (4314)	Basic		11/20/2019			
Community Alliance (4314 or 4315)	HUD					
Community Alliance (4314 or 4315)	PATH					
Community Alliance (4314 or 4315)	HUD					

- Click on **Add Interim Review** in the [Interim Reviews](#) pop-up to create a new interim.



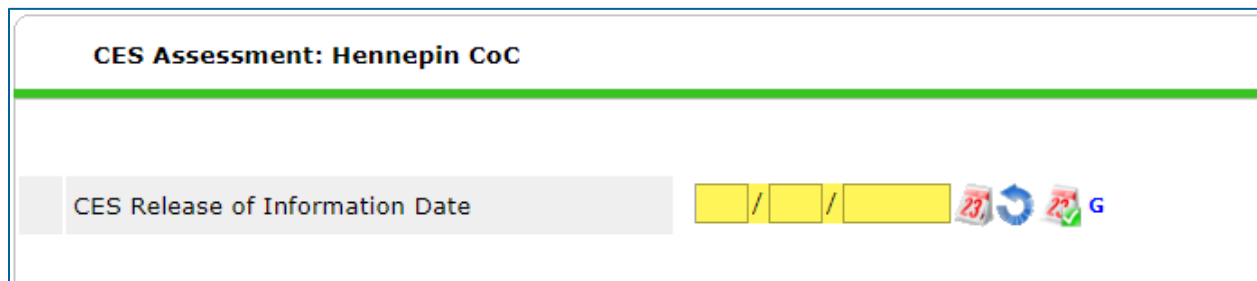
- In the next pop-up, select **Update** for the [Interim Review](#) type and enter the date the CES ROI was signed in the [Review Date](#) field. Click on **Save & Continue**.
- Record the client's [CES Release of Information Date](#) at the top of the assessment.











- When you are finished, scroll down to the bottom of the update assessment and click on **Save & Exit**.

### ENTRY ASSESSMENT: CLIENT SIGNED CES ROI DURING ASSESSMENT

- Click on **Enter Data As** and select your Coordinated Entry Assessment provider (4314 or 4315).
- Open the client's record. When prompted, select **Use Current System Date**.
- Select the **Entry/Exit** tab and add a new Entry/Exit for your Coordinated Entry Assessment provider. (Refer to the [HMIS Data Entry Instructions](#) for directions.)
- While filling out the CES assessment, record the client's [CES Release of Information Date](#).



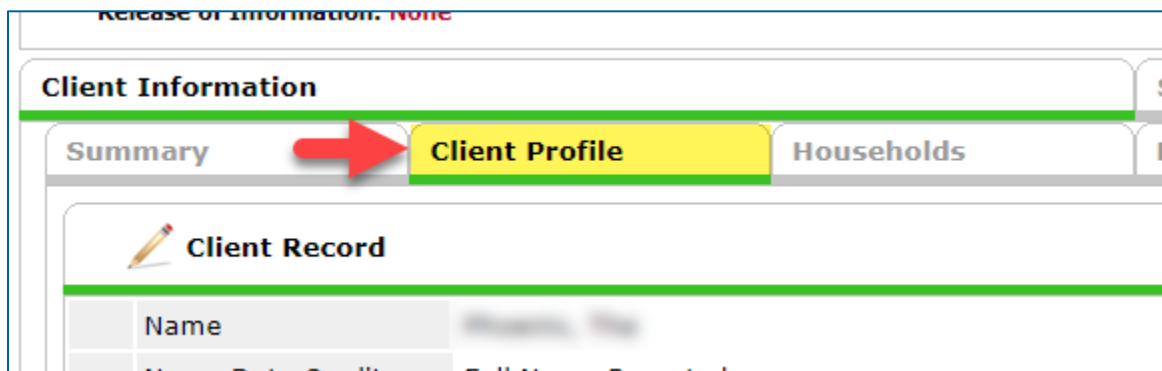
- a. If you forgot to record the [CES Release of Information Date](#), you can reopen the entry assessment at a later date by clicking on the **edit pencil** next to its [Project Start Date](#).

Entry / Exit					
Program	Type		Project Start Date	Exit Date	Inter
Hennepin Singles Coordinated Entry Assessment (4314)	Basic		11/20/2019		
	HUD				
	PATH				
	HUD				



**[OPTIONAL] UPLOAD A CES RELEASE OF INFORMATION**


Agencies can choose to upload a digital copy of a client’s CES Release of Information to HMIS for record-keeping purposes.

1. Click on [Enter Data As](#) and select your Coordinated Entry assessment provider (4314 or 4315).
2. Open the client’s record. When prompted, select [Use Current System Date](#).
3. Select the [Client Profile](#) tab and scroll down to the [File Attachments](#) sub-assessment.



4. Click on [Add New File Attachment](#), then select [Choose File](#) in the [Upload Attachment](#) pop-up.

File Attachments						
		Date Added ▼	Name	Description	Type	Provider
		01/26/2017			pdf	Institute for Community Alliances (ICA)

[Add New File Attachment](#)  Showing 1-1 of 1

5. Select the digital copy of the [CES Release of Information](#) in your file browser and click on [Open](#).
6. Click on [Upload](#) in the [Upload Attachment](#) pop-up.