Assessor Workflow

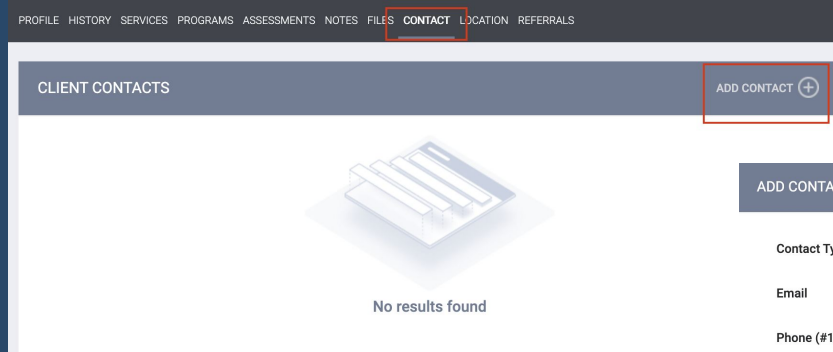Memphis Coordinated Entry

Bitfocus

Agenda

- ▶ Contact Information
- ▶ Switching Agencies
- ▶ Coordinated Entry Enrollment
- ▶ Current Living Situation
- ▶ Assessment
- ▶ Referral to the queue
- ▶ Check-ins
- ▶ Coordinate Entry Events Services
- ▶ Exit
- ▶ Reports

✔ Bitfocus

Contact Information

Contact Information

Record contact information under the *Contact Tab.*

Bitfocus

Contact Information

▶ Disable the "Active Contact" toggle when information becomes out of date.
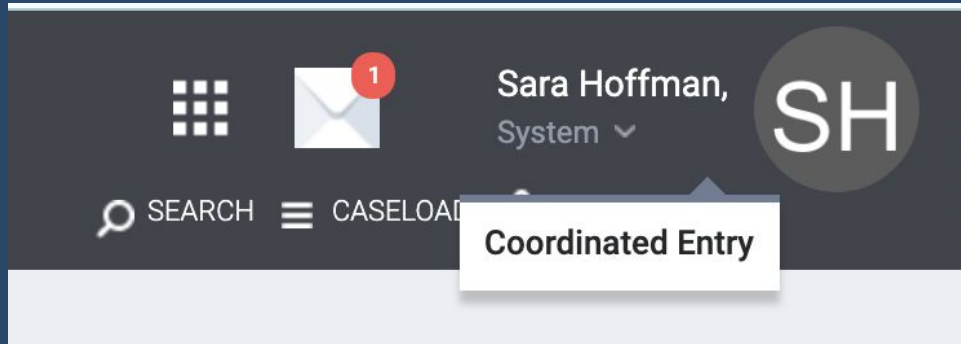▶ Inactive contacts are still accessible.

Switching Agencies

Switching Agencies

▶ Coordinated entry data collection should be done under the Coordinated Entry Agency.

Note- The By-Name List Agencies will be consolidated and renamed.

Coordinated Entry Enrollment

Coordinated Entry Enrollment

▶ Coordinated entry data collection must be connected to a program enrollment.

▶ An enrollment indicates a client's initial engagement in the coordinated entry process.

▶ If a client is exited from coordinated entry and returns to homelessness, a new enrollment should be entered.

PROGRAMS: AVAILABLE

Coordinated Entry ⌄

Problem Solving/ Diversion ⌄

Bitfocus

Bitfocus

Coordinated Entry Enrollment

▶ Information may cascade (auto-populate) from other screens.

▶ Review cascaded information for accuracy and make adjusts if necessary.

▶ Avoid using "Data not Collected" when possible.

PRIOR LIVING SITUATION

Type of Residence	Place not meant for habitation (e.g., a vehicle, an abandoned building, bu...
Length of Stay in Prior Living Situation	One month or more, but less than 90 days
Approximate Date Homelessness Started	11/01/2020
Number of times on the streets, in ES, or Safe Haven in the past three years	Four or more times
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	Eleven Months

DISABLING CONDITIONS AND BARRIERS

Disabling Condition	Yes		
Physical Disability	No		
Developmental Disability	No		
Chronic Health Condition	No		
HIV - AIDS	Yes		
Mental Health Problem	Yes	Long Term	Yes
Substance Abuse Problem	No		
Domestic Violence Victim/Survivor	No		

Bitfocus

Current Living Situation

Bitfocus

Current Living Situation

▶ HUD requires a Current Living Situation (CLS) is recorded to document the following:
  ➢ The current living situation of people experiencing homelessness
  ➢ Homeless chronicity
  ➢ Engagement with the Homeless Responses System
▶ Collected for the Head of Household (HoH) and other adults.

Bitfocus

Bitfocus

A Current Living Situation is required if any of the following occur:

- ▶ Project start
- ▶ A CE Assessment or CE Event is recorded
- ▶ The client's living situation changes
- ▶ If a CLS hasn't been recorded for longer than 60 days

Note: If two of the above occur on the same day, you only enter one CLS.

Current Living Situation Assessment

Quiz: Current Living Situation Assessment

1. A client is enrolled into a coordinated entry program. Do you need to complete a CLS at that time?

Answer= Yes

2. A client is enrolled into a coordinated entry program and completes an assessment at the same time. You will need to complete two CLS.

Answer= False

3. A client is exited from a coordinated entry program. Do you need to complete a CLS?

Answer= No

✔ **Bitfocus**

Coordinated Entry Assessment

Coordinated Entry Assessment

▶ Check the client's history tab before completing an assessment.
   ▶ An assessment warning will pop-up if an assessment has been completed recently.

memphis.clarityhs.com says

A recent assessment of this type already exists for this client. Are you sure you wish to create another assessment?

Cancel   OK

✔ Bitfocus

Coordinated Entry Assessment

▶ Assessment will be completed as program-level assessment.
▶ A new assessment should be completed when a client's circumstances have significantly changed.
  ▶ Complete a new assessment.
  ▶ Don't edit the existing assessment.

Bitfocus

Coordinated Entry Assessment

Assessments names have changed.

Referral to the Queue

Referral to the Community Queue

▶ Assessments are added to the queue when the assessment is completed.

▶ Clients who score four or above should be added to the queue.

PROGRAM ELIGIBILITY DETERMINATION

VI-SPDAT-V2 Score Summary

GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	1	RISKS	4
SOCIALIZATION & DAILY FUNCTION	3	WELLNESS	5
VI-SPDAT-V2 PRE-SCREEN TOTAL	**13**		

Individuals: Housing Queue

Individuals: Shelter Queue

REFER DIRECTLY TO COMMUNITY QUEUE(S)

Bitfocus

Bitfocus

Referral to the Community Queue

▶ An assessment can be added to the queue at a later time through the *Eligibility Determination Screen.*

Removal from the Community Queue

▶ Clients may be removed from the queue if they:

- ○ Self-resolve
- ○ Pass away
- ○ Added by mistake

Check-ins

Bitfocus

Check-ins

Indicates the client is still engaged and will keep the client active on the community queue.

Coordinated Entry Events Services

Coordinated Entry Event Services

Coordinated Entry Event services are recorded to capture access and referral events, as well as the results of those events.

- ▶ Required as part of the 2020 HUD Data Standards.
- ▶ Services under the coordinated entry programs are categorized as CE Events.
- ▶ CE Events are essential to keeping a client active in the CE program.
  - ▶ Clients with no activity for 90 days will be auto-exited.

CE Event Services

▶ Services should be recorded when the activity occurs.

CE Event Services

▶ Some services may contain a results field.
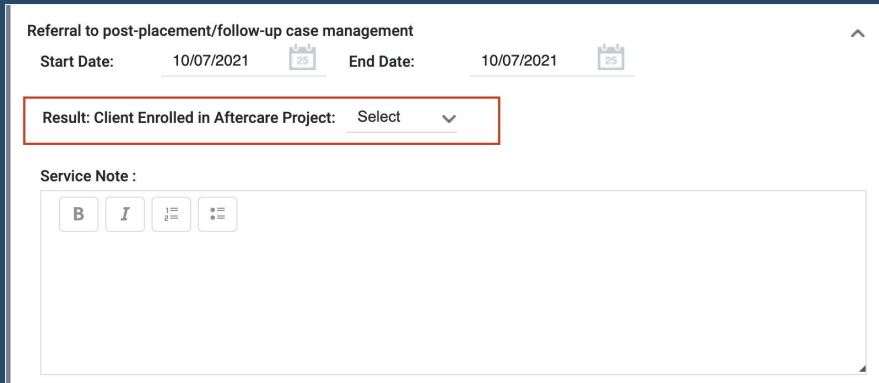
Referral to post-placement/follow-up case management

Start Date: 10/07/2021 End Date: 10/07/2021

Result: Client Enrolled in Aftercare Project: Select ▼

Service Note :

Remember *Every time a CE event is recorded, you must enter a Current Living Situation.*

Bitfocus

Uploading Documents

Uploading Documents

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES **FILES** CONTACT LOCATION REFERRALS

CLIENT FILES   ADD FILE ⊕
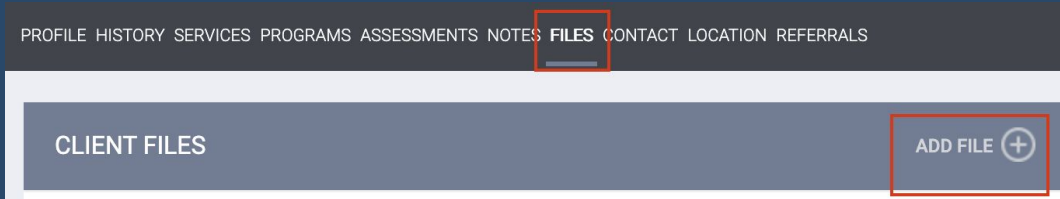
- ▶ Client documents should be uploaded under the *Files Tab.*
- ▶ Select the category Verification of Disability or Verification of Homelessness.

✓ Client Attachments
Family, Social and Legal
Finances and Income
Health and Medical
Housing Documents
HPRP Documentation
Personal Identification
PSH File
Verification of Disability (VOD)
Verification of Homelessness (VOH)

✓ Bitfocus

Program Exits

Exits

▶ A program exit indicates the end of a client's engagement in the coordinated entry process.
▶ A client should be exited from coordinated entry for the following reasons:
  ▶ Obtained permanent housing
  ▶ Left the CoC
  ▶ Deceased
  ▶ Declined all services

Bitfocus

Bitfocus

Exits

Auto-Exits Due to Inactivity

The following events will trigger an auto-exit from the coordinated entry program:

▶ No program-level services or assessment has been recorded for a 90 days.

Auto-Exits to a Permanent Destination

The following events will trigger an auto-exit from the coordinated entry program:

▶ A *Housing Move-In Date* is saved for any program with a permanent housing project type.

▶ A "housed" or "deceased" exit destination is saved for any program exit screen.

Bitfocus

Quiz: Auto-Exits to a Permanent Destination

1. The client is referred to a PSH program. The client is enrolled in the program with a move-in date of 7/30/20. Will the client be automatically exited?

Answer = Yes

1. The client has been enrolled in a Rapid Rehousing program on 7/1/21. No move-in date has been entered.

Answer= No (*The client will be exited once the move-in date is entered).*

✔ Bitfocus

Quiz: Auto-Exits to a Permanent Destination

3. The client is exited from a shelter program and the destination is listed as PSH. Will the client be automatically exited?

Answer= Yes

Recap

Recap of HUD Coordinated Entry Data Collection Requirements

1. Enrollment
2. Current Living Situation
3. Assessment (VI-SPDAT)
4. Referral to the community queue
5. Coordinated Entry Event Services
6. Exit

Bitfocus

Let's Talk Reports

CE Assessment Details Report

▶ [GNRL-404] CE Assessment Details Report (Assessment Reports)

○ Who's been assessessed

○ Who's on the queue

○ Details of responses

○ Staff information

CE Assessment Details Report

CE Assessment Details Report — **Bitfocus Coordinated Entry Agency**
06/04/2020 - 10/02/2020

CE- Crisis Assessment

Assessment processor: Bitfocus Test Assessment

Date	Client Last Name	Client First Name	Unique ID	Age	Gender	Veteran	CE Household Type	Adults in CE Household	Children in CE Household	Referred to Queue	Contact Info	Assessing Program	Staff	Staff Home Agency	Assessment Score	Sub-scores					
																Age and Household Size	Current Housing Situation	Duration of Homelessness and Chronic Homelessness	Housing Barriers	Health, Disabilities, Extreme Medical Needs, Self-Care Needs	Safety
09/21/2020	Bunny	Bugs	49D21344B	35	Male	No	Without Children	1	0		No	Bitfocus Coordinated Entry	Adderly, Kadra	**Alameda County CE Agency (Test)	18	0	18	0	0	0	0
08/21/2020	Spot	Johnny	0DA1400DC	21	Male	Yes	Without Children	1	0		No	Bitfocus Coordinated Entry	Hoffman, Sara	**Alameda County CE Agency (Test)	57	0	18	9	6	24	0
10/02/2020	Spot	Johnny	0DA1400DC	21	Male	Yes	Without Children	1	0		No	Bitfocus Coordinated Entry	Hoffman, Sara	**Alameda County CE Agency (Test)	63	3	18	9	15	18	0

Number of Clients assessed: 2

CE- Housing Assessment

Assessment processor: Bitfocus Test Assessment

Date	Client Last Name	Client First Name	Unique ID	Age	Gender	Veteran	CE Household Type	Adults in CE Household	Children in CE Household	Referred to Queue	Contact Info	Assessing Program	Staff	Staff Home Agency	Assessment Score	Sub-scores					
																Age and Household Size	Current Housing Situation	Duration of Homelessness and Chronic Homelessness	Housing Barriers	Health, Disabilities, Extreme Medical Needs, Self-Care Needs	Safety
09/21/2020	Bunny	Bugs	49D21344B	35	Male	No	Without Children	1	0	Permanent Housing & RRH Queue	No	Bitfocus Coordinated Entry	Adderly, Kadra	**Alameda County CE Agency (Test)	93	0	18	45	18	12	0
08/05/2020	Test	Sara	8A6BC33AF	31	Female	No	Without Children	1	0		No	Bitfocus Coordinated Entry	Hoffman, Sara	**Alameda County CE Agency (Test)	132	21	18	18	12	63	0

Number of Clients assessed: 2

Total Clients Assessed: 5

Assessment List
CE- Crisis Assessment
CE- Housing Assessment

CE Assessing Staff Report

▶ [GNRL-405] CE Assessing Staff Report (Assessment Reports)

  ○ All assessments created during the reporting period

  ○ Separated by the assessing staff person.

CE Assessing Staff Report

Resources

▶ Slides/training materials can be found here: https://www.cafth.org/hmis-resources/

▶ Additional questions/concerns regarding the training, please contact the HMIS Help Desk at helpdesk@cafth.org

Bitfocus

Next Steps

Go live November 11th

- ► All elements of the coordinated entry workflow will be available
- ► Access roles may change depending on your role

Bitfocus

Questions?

Bitfocus