

Assessor Workflow

Memphis Coordinated Entry



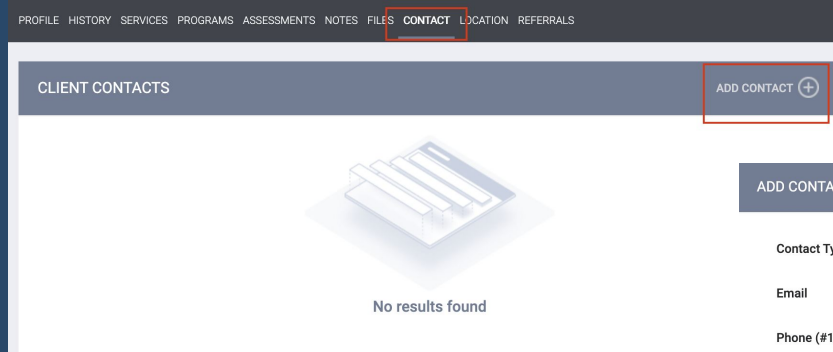
Agenda

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

Contact Information



Contact Information



ADD CONTACT

Contact Type Client ▾

Email

Phone (#1)

Phone (#2)

Active Contact

Contact Date

Note

B *I*

SAVE CHANGES CANCEL

This screenshot shows the 'ADD CONTACT' form. It includes a dropdown menu for 'Contact Type' (set to 'Client'), text input fields for 'Email', 'Phone (#1)', and 'Phone (#2)', a toggle switch for 'Active Contact' (checked), a date picker for 'Contact Date', and a rich text editor for 'Note' with buttons for bold, italic, bulleted list, and numbered list. At the bottom are 'SAVE CHANGES' and 'CANCEL' buttons.

Record contact information
under the *Contact Tab*.



Contact Information

- ▶ Disable the “Active Contact” toggle when information becomes out of date.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

Phone (#1)

Phone (#2)

Active Contact

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

CLIENT CONTACTS ADD CONTACT +

Contact Type	Name	Phone	Email	Date
Client	Janey Test	555-555-1234		10/07/2021

[\(show inactive contacts\)](#)



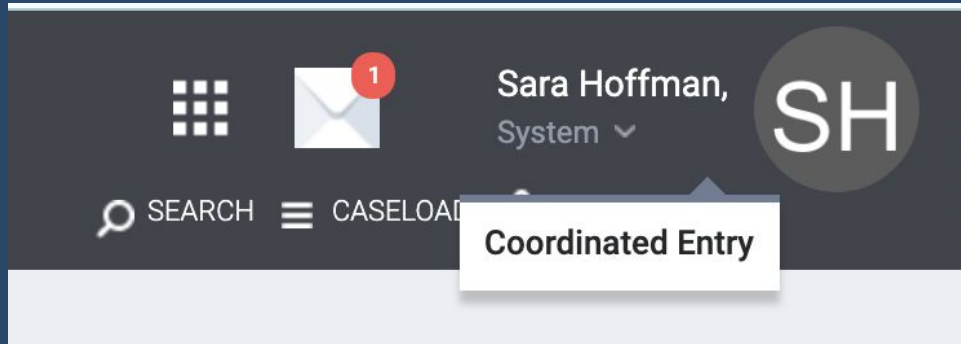
Switching Agencies



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	▼

The screenshot shows a web interface with a header 'PROGRAMS: AVAILABLE'. Below the header is a list of two programs. The first program, 'Coordinated Entry', is highlighted with a red rectangular border. The second program, 'Problem Solving/ Diversion', is below it. Both programs have a downward-pointing chevron icon to their right, indicating they are part of a dropdown menu.

Coordinated Entry Enrollment

- ▶ Information may cascade (auto-populate) from other screens.
- ▶ Review cascaded information for accuracy and make adjustments 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 <small>Pick a date</small>
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

Current Living Situation



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.

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

PROGRAM: COORDINATED ENTRY

Enrollment History **Assessments** Notes Files × Exit

Assessments LINK FROM ASSESSMENTS

Current Living Situation START

ADD PROGRAM ASSESSMENT ×

Pita Pocket Grandchild

ADD CURRENT LIVING SITUATION

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



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

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.

Coordinated Entry Assessment

Assessments names have changed.

Families VI	START
Single Adults VI	START
TAY-VI-SPDAT [V2]	START
VI-F-SPDAT Prescreen for Families [V2]	START
VI-SPDAT Prescreen for Single Adults [V2]	START
Youth VI	START

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)

Referral to the Community Queue

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

ASSESSMENT HISTORY			
Advanced Search Options View ▾			
Assessment Name	Completed	Details	
Single Adults VI By-Name List - Individuals ⓘ	10/01/2021	VI-SPDAT-V2 : 14	ELIGIBILITY

Removal from the Community Queue

- ▶ Clients may be removed from the queue if they:
 - Self-resolve
 - Pass away
 - Added by mistake

The screenshot displays a user interface for a client's profile. At the top, a navigation bar includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', 'LOCATION', and 'REFERRALS'. The 'HISTORY' tab is active and highlighted with a red box. Below this, a 'HISTORY' section contains an 'Advanced Search Options' filter with a 'View' dropdown. A search result is shown for a 'Referral: Individuals: Housing Queue' with a status of '10/'. A red box highlights the edit icon next to this entry. A modal dialog box titled 'REMOVE FROM QUEUE' is open, featuring a 'Reason for Removal' dropdown menu with the following options: '-- Select Reason --', 'Self Resolved', 'Refused All Housing', 'Whereabouts Unknown', 'Deceased', 'Reassessed', 'Automated Removal', and 'Other'. The dialog also includes a 'Queue Removal Date' field and 'CHANGES' and 'CANCEL' buttons.


Check-ins



Check-ins

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

REFERRAL: ASSIGN

Client	Juliet Mendoza
Previous Referred Program	Evergreen PSH
Previous Referred to Agency	Housing Test Agency
Referring Agency	[TRAINING] San Francisco Adult Coordinated Entry Agency
Referred Date	12/13/2018 4:21 PM
Days Pending	683 day(s)
Qualified	Reassigned
Last Activity	07/31/2020 CHECK-IN
Referred by Staff	Ja Guerrero Huh 
Navigator	ASSIGN NAVIGATOR
Private	<input type="checkbox"/>

SAVE CHANGES CANCEL



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.

PROGRAM: BY-NAME LIST - INDIVIDUALS

Enrollment History **Provide Services** Assessments Notes ✕ Exit

Services

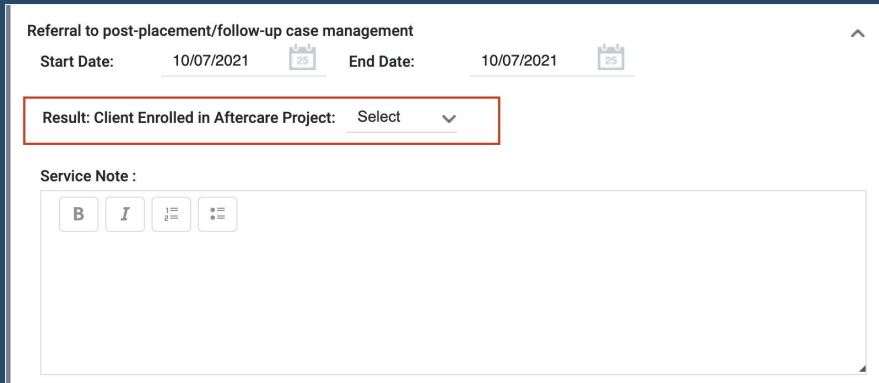
Coordinated Entry Event Coordinated Entry Event ▾

- Referral to Housing Navigation --- [WHEN TO USE: internal referral to a housing navigator within your agency] ▾
- Referral to Post-Placement/Follow-Up Case Management --- [WHEN TO USE: if you send a referral to the Housing First Team (Note: a referral must also be sent to the Housing First Team *program*)] ▾
- Referral to Services Outside CoC --- [WHEN TO USE: if you are referring the client to benefit assistance or other services (e.g. Aging Commission, insurance assistance, etc.) that aren't tracked within Clarity] ▾
- Referral to Street Outreach Project or Services --- [WHEN TO USE: internal referral to a Street Outreach project within your agency] ▾
- Referral to VI Assessment --- [WHEN TO USE: only used if you aren't able to complete the VI assessment at the same time you enroll the client in Coordinated Entry] ▾






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: 

Service Note :

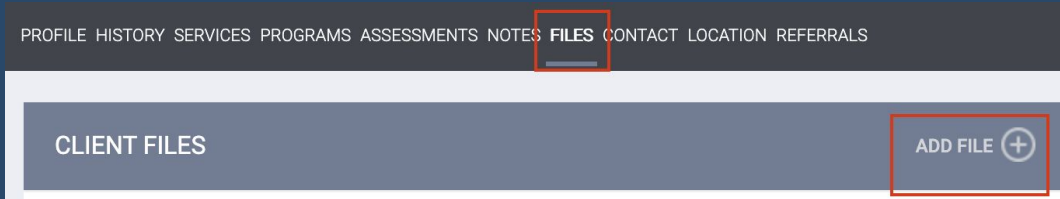
   

****Remember*** Every time a CE event is recorded, you must enter a Current Living Situation.*

Uploading Documents



Uploading Documents



- ▶ 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)

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

Exits

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

PROGRAM HISTORY


Program Name	Start Date	End Date	Type
Problem Solving Services Only Bitfocus Test Agency ⓘ	08/21/2020	Active	Individual
 Bitfocus Coordinated Entry Coordinated Entry Bitfocus Test Agency ⓘ	08/21/2020	Active	Individual

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

PROGRAM: BITFOCUS COORDINATED ENTRY

Enrollment History Provide Services Assessments Notes Files Forms **x Exit**

End Program for client Johnny Spot

Project Exit Date 09/21/2020 

Destination Select

DISABLING CONDITIONS AND BARRIERS

Physical Disability No

Developmental Disability No

Chronic Health Condition Yes Long Term Yes

HIV - AIDS Yes

Mental Health Problem No

Substance Abuse Problem No



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.

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*).



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

Let's Talk Reports



CE Assessment Details Report

- ▶ [GNRL-404] CE Assessment Details Report (Assessment Reports)
 - Who's been assessed
 - 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															Sub-scores						
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	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															Sub-scores						
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	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

CE Assessing Staff Report												Bitfocus Coordinated Entry Agency		
												08/01/2020 - 10/02/2020		
Kadra Adlerly: **Alameda County CE Agency (Test)														
Date	Client Full Name	Unique ID	Age	Gender	Veteran	CE Household Type	Adults in CE Household	Children in CE Household	Assessment Name	Assessment Score	Referred to Queue	Contact Info	Assessing Agency	Assessing Program
09/21/2020	Bunny, Bugs	49D21344B	35	Male	No	Without Children	1	0	CE- Crisis Assessment	18		No	Bitfocus Coordinated Entry Agency	Bitfocus Coordinated Entry
09/21/2020	Bunny, Bugs	49D21344B	35	Male	No	Without Children	1	0	CE- Housing Assessment	93	Permanent Housing & RRH Queue	No	Bitfocus Coordinated Entry Agency	Bitfocus Coordinated Entry
Number of Clients Assessed: 1														
Kendall Shawhan: **Alameda County CE Agency (Test)														
Date	Client Full Name	Unique ID	Age	Gender	Veteran	CE Household Type	Adults in CE Household	Children in CE Household	Assessment Name	Assessment Score	Referred to Queue	Contact Info	Assessing Agency	Assessing Program
09/02/2020	Leaves-Ks, Fall	A9A3C0390	41	Female	No				CE- Housing Assessment	90	Default, Permanent Housing, Permanent Housing & RRH Queue	No	Bitfocus Coordinated Entry Agency	
08/25/2020	Test, Anna	6A99332C5	29	Female	No	Without Children	1	0	CE- Housing Assessment	66		No	Bitfocus Coordinated Entry Agency	Bitfocus Coordinated Entry
08/25/2020	Test, Tommy	B8533C74E	41	Male	No	Without Children	1	0	CE- Housing Assessment	48		No	Bitfocus Coordinated Entry Agency	Bitfocus Coordinated Entry
Number of Clients Assessed: 3														
Sara Hoffman: **Alameda County CE Agency (Test)														
Date	Client Full Name	Unique ID	Age	Gender	Veteran	CE Household Type	Adults in CE Household	Children in CE Household	Assessment Name	Assessment Score	Referred to Queue	Contact Info	Assessing Agency	Assessing Program
08/21/2020	Spot, Johnny	0DA1400DC	21	Male	Yes	Without Children	1	0	CE- Crisis Assessment	57		No	Bitfocus Coordinated Entry Agency	Bitfocus Coordinated Entry
10/02/2020	Spot, Johnny	0DA1400DC	21	Male	Yes	Without Children	1	0	CE- Crisis Assessment	63		No	Bitfocus Coordinated Entry Agency	Bitfocus Coordinated Entry
08/25/2020	Test, Spot	6A99332C5	29	Female	No	Without Children	1	0	CE- Housing Assessment	48		No	Bitfocus Coordinated Entry Agency	Bitfocus Coordinated Entry



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

Next Steps

Go live November 11th

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



Questions?

