

# Provider Workflow

Memphis Coordinated Entry



# Agenda

- ▶ Posting Available Resources
- ▶ Pending Referrals Tab
- ▶ Changing the Status of Referrals
- ▶ Referral Notifications
- ▶ Denying a Referral
- ▶ Accepting a Referral
- ▶ Reports

# Posting Available Resources



# Posting Available Resources

- ▶ There are three settings on the *Availability Tab*:
  - ▶ **Full Availability**
  - ▶ **Limited Availability – Memphis Housing Providers**
  - ▶ **No Availability**

*\*Note: Today's training will focus on Limited Availability.*

# Processing Referrals



# Referral Notifications

- ▶ Referral notifications will be sent to assigned staff.
- ▶ If staff change, providers need to contact your Memphis Help Desk to change the staff assigned to the program.



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Dear Sara Hoffman,

[this client](#) has been referred to a program.

Please follow [this link](#) to view the new pending referral.

Professional Services Clarity System Team

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Questions? Visit our online wiki: [get.clarityhs.help](#)



# Referrals Tab

The *Referrals Tab* will direct providers to the various screens needed to access referral information.

Community Alliance for the Homeless

Kendall Shawhan,  
Community Alliance for the Homele...

SEARCH CASELOAD REFERRALS

SEARCH FOR A CLIENT ADD CLIENT +

Enter search terms for a client SEARCH

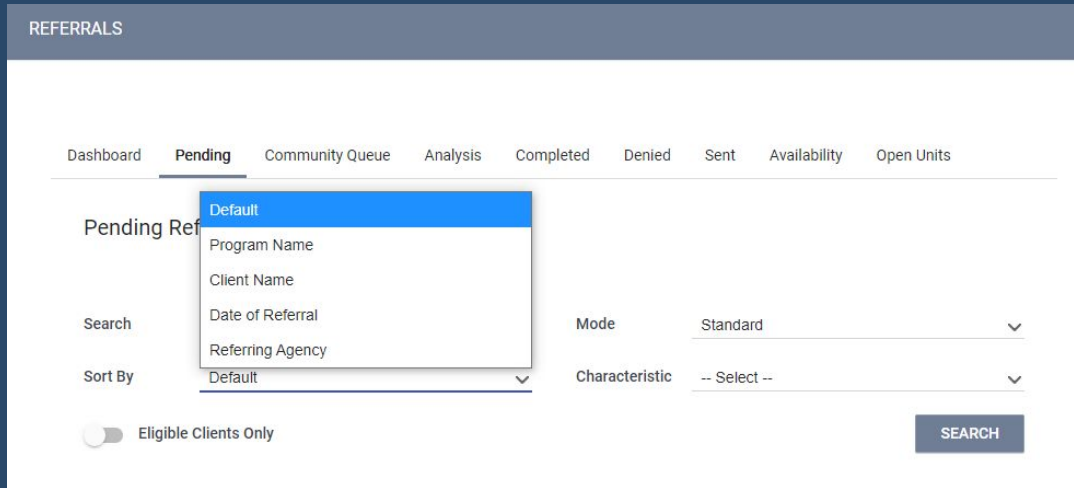
Use full name, partial name, date of birth or any combination.

Coronavirus (COVID-19): For Updates and Preparedness Resources for providers, please visit [cafth.org/coronavirus](https://cafth.org/coronavirus).  
CAFTH staff members are currently working remotely. To contact a staff member, please do so through email [Helpdesk@cafth.org](mailto:Helpdesk@cafth.org).

Managed with Clarity Human Services Recover deleted data

# The Pending Tab

- ▶ The *Pending Tab* contains referrals still in process for the user's agency.
- ▶ Filter by program name, referral date, client name or referring agency.



The screenshot displays the 'REFERRALS' section of a web application. At the top, there is a navigation bar with tabs: Dashboard, Pending (selected), Community Queue, Analysis, Completed, Denied, Sent, Availability, and Open Units. Below the navigation bar, the 'Pending Referrals' section is visible. A dropdown menu is open, showing the following options: Default (highlighted), Program Name, Client Name, Date of Referral, and Referring Agency. To the left of the dropdown, there are labels for 'Search' and 'Sort By'. Below the dropdown, there is a 'Mode' dropdown set to 'Standard' and a 'Characteristic' dropdown set to '-- Select --'. At the bottom left, there is a toggle switch for 'Eligible Clients Only' which is currently turned off. At the bottom right, there is a 'SEARCH' button.



# Processing Referrals: Pending-in Process

- ▶ Pending in-process acknowledges the provider has received the referral.
- ▶ Update the status within a few days of receiving the referral.
- ▶ The matchmaker will receive a notification when the status is changed.

Referred to Agency	Sara's Test Agency
Referring Agency	Sara's Test Agency
Referred Date	12/19/2018 8:51 AM
Days Pending	7 day(s)
In Process	0 day(s)
Qualified	Reassigned
Adult Priority score	57
Referred by Staff	Sara Hoffman
Case Manager	Select <input type="text"/>
Last Activity	12/19/2018 <input type="button" value="CHECK-IN"/>
Status	<input checked="" type="checkbox"/> Pending <input type="checkbox"/> Pending - In Process <input type="checkbox"/> Denied <input type="checkbox"/> Expired
Private	<input type="checkbox"/>


REFERRAL CONNECTIONS



# Referral Features

Notification	Action
Pending Notification	If the status of the referral stays in pending for more than 7 days, the provider will receive notifications until the status is changed.
Pending-in Process Notification	If the status of the referral stays in pending-in process for more than 30 days, the provider will receive notifications until the status is changed.
Community Referral Threshold	If a referral stays in pending for more than 7 days the client will be sent back to the queue and the referral will expire.

# Referral Notifications




Dear Sara Hoffman,

The following Referrals have been Pending more than 7 days:

Client	Referral Date	Days Pending
<a href="#">35266B209</a> Program: Evergreen Family Individual Room Shelter Referred By: [TRAINING] San Francisco Family Coordinated Entry Agency	06/02/2020	56

Questions? Visit our online wiki: [get.clarityhs.help](#)





# Denying a Referral

- ▶ Matchmakers are notified when a referral has been denied.
- ▶ Four additional fields will populate:
  - ▶ Send to Community Queue
  - ▶ Denied by type
  - ▶ Denied Reason
  - ▶ Denial Information

Status	Denied	▼
Send to Community Queue	-- Select --	▼
Denied By Type	-- Select --	▼
Denied Reason	Select	▼
Denial Information	<input type="text"/>	

# Accepting Referrals

- ▶ Accepting the referral enrolls the client and completes the referral simultaneously.
- ▶ The “program placement a result of...” toggle must be enabled.
- ▶ The orange pending referral box let’s you know you’re enrolling in the right program.

The screenshot displays a referral management interface with the following elements:

- Client and Unit Counts:** Two circular gauges at the top show 3 CLIENTS and 3 UNITS.
- Demographics:** A legend indicates 0% Families and 100% Individuals for clients, and 10% Checked In, 0% Reserved, and 90% Available for units.
- Funding Source:** HUD/DOC - Permanent Supportive Housing.
- Service Categories:** Housing, Housing Search and Placement, and Case Management are all selected.
- Availability:** Limited Availability.
- PROGRAM AVAILABILITY:** Available openings: 2.
- HOUSING AVAILABILITY:** Households without children: 30 Beds in 30 Units.
- Program Placement:** A toggle for "Program Placement a result of Referral provided by SFHOT Practice Agency" is checked and highlighted with a red box.
- Include group members:** First Last and Castro Valley are unselected.
- Pending Referral:** A red box highlights "1 pending referral(s), Oldest 116 days".
- DOC REQUIREMENTS:** A section at the bottom with an ENROLL button.

# Accepting Referrals


- ▶ The chain link icon indicates that the enrollment is linked to a referral.

Bruce Spruce

PROFILE HISTORY SERVICES PROGRAMS NOTES ASSESSMENTS FILES CONTACT LOCATION REFERRALS

HISTORY




Advanced Search Options View ▾

Service Name	Start Date	End Date
<b>Referral: Denali Transitional Housing</b> Gartner Agency referral to Gartner Agency ⓘ	06/22/2020	06/22/2020
<b>Denali Transitional Housing</b> Gartner Agency ⓘ	06/22/2020	<b>Active</b> 


# Move-In Date

- ▶ Move-in dates should be entered on the enrollment screen.
  - ▶ **PSH programs:** the move-in date is typically the same as the enrollment date.
  - ▶ **RRH:** the move-in date should reflect the date the client actually moved into housing.



Enroll Program for client Bitfocus Test

Project Start Date	07/20/2020 
Anticipated Length of subsidy - no of months	<input type="text"/>
Is the Client an Adult or Head of Household?	Yes (Automatically Generated Response) 
Is the Program Type a Permanent Housing Program Type?	Yes (Automatically Generated Response) 

COMPLETE HOUSING MOVE-IN DATE WHEN CLIENT MOVES INTO A PERMANENT HOUSING UNIT

Housing Move-In Date	<input type="text"/> 
Unit Number	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
Zipcode	94102

PRIOR LIVING SITUATION

Type of Residence	Emergency shelter, including hotel or motel paid for with emergency shelter 
Length of Stay in Prior Living Situation	One month or more, but less than 90 days 



# Annual & Status Assessments





# Annual & Status Assessments

- ▶ Annual assessment:
  - Completed every year within +/- 30 days of enrollment anniversary.
- ▶ Status assessments:
  - Completed if there is a significant change in the client's situation between annual assessments.

# Annual & Status Assessments

- ▶ There are two ways to access annual and status assessments in ONE.

**4** DAYS ACTIVE PROGRAM

Program Type:	Individual
Program Start Date:	09/20/2021
Assigned Staff:	Sara Hoffman <input checked="" type="checkbox"/>
Head of Household:	Jane Doe <input checked="" type="checkbox"/>

**Program Group Members** +

No active members

**Status Assessments** +

No Statuses

Assessment due every year  
Notification: ON

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

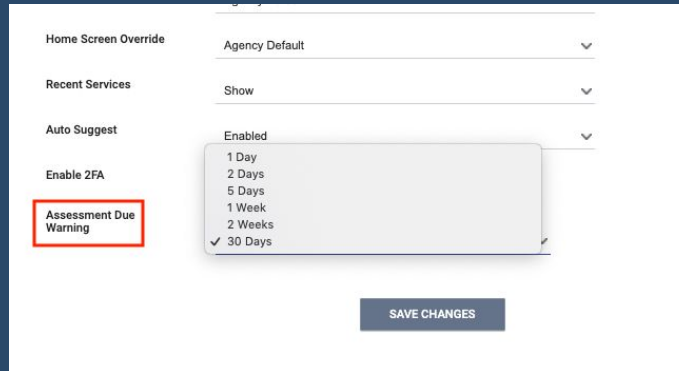
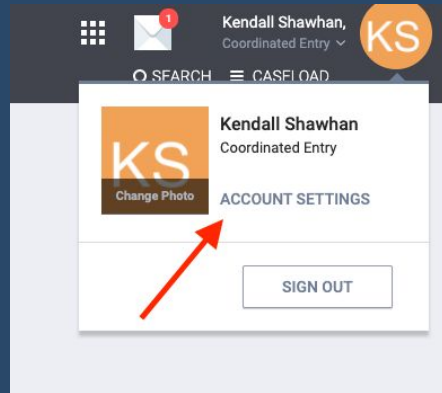
Assessments LINK FROM ASSESSMENTS

Status Update Assessment	<b>START</b>
Annual Assessment	<b>START</b>



# Assessment Warnings- Under Account Settings

- ▶ Staff can set assessment warnings to notify them when a client's assessment is due.
- ▶ Timelines can be set between 1-30 days.



# Assessment Warnings- Program Level

- ▶ Program-level warnings can be set under the enrollment screen.
- ▶ Enabling warnings at this level will enable them for all case managers assigned to this enrollment.

The screenshot shows a web interface for program management. At the top, a green header displays '368 DAYS ACTIVE PROGRAM'. Below this is a table with the following details:

Program Type:	Individual
Program Start Date:	09/29/2019
Assigned Staff:	Sara Hoffman
Head of Household:	Rosemary Rob

Below the table, there are sections for 'Program Group Members' (No active members) and 'Status Assessments' (+). A red box highlights the text 'Assessment Due - September 29th 2020'. Underneath, it says 'No statuses'. At the bottom, there is a toggle for 'Assessment due every year' with 'Notification: ON' and a checked checkbox. A red arrow points to the 'ON' text.

# Exits



# Exits

- ▶ Exits should be entered when a client is no longer receiving services from the program.
  - ▶ Be sure to include an exit destination for the client.
  - ▶ You will complete an exit for all household members.

The screenshot displays the Bitfocus user interface. At the top, a navigation bar includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS' (highlighted with a red box), 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', and 'LOCATION'. Below this is a 'PROGRAM HISTORY' section with a table listing programs. The first entry is 'Providence Family Services Center' with a start date of '09/15/2020'. A red box highlights a checkmark icon in the first column of this row. A modal window is open over this entry, titled 'PROGRAM: ECS: BAYVIEW ACCESS POINT'. It features tabs for 'Enrollment', 'History' (selected), 'Provide Services', 'Assessments', 'Notes', 'Files', and 'Forms'. A red box highlights an 'X Exit' button in the top right corner of the modal. The 'Program Service History' section within the modal shows a table with one entry: 'Problem Solving :Initiated Problem Solving Conversation' starting on '10/15/2019' and ending on '10/15/2019'. Below the table are radio buttons for 'Reservation', 'Service', and 'Referral'.

Program Name	Start Date	End Date	Type
Providence Family Services Center Emergency Shelter: Entry/Exit Date Providence Foundation ⓘ	09/15/2020		PROGRAM: ECS: BAYVIEW ACCESS POINT

Service Name	Start Date	End Date
Problem Solving :Initiated Problem Solving Conversation [TRAINING] San Francisco Adult Coordinated Entry Agency	10/15/2019	10/15/2019

# Let's Talk Reports



# Referral Statistics Report

[RFRL-103] Referral Statistics - Inbound (Community and Referral Reports)

- ▶ Who's been referred to your agency
- ▶ Number of referrals received by an agency
- ▶ Status of referrals



# Referral Statistics Report

<b>Referral Statistics</b>		<b>Sarah Smith Housing Services</b>
Dates Between:		05/01/2018 and 12/27/2018
Referral Direction:		Outbound
Number of Agency referrals received		3
<b>Pending Referrals</b>		
Number of pending referrals		1
Oldest pending referral in days		83
Newest pending referral in days		83
Average pending referral in days		83
<b>Pending - In Process Referrals</b>		
Number of pending referrals		0
Oldest pending referral in days		0
Newest pending referral in days		0
Average pending referral in days		0
<b>Completed Referrals</b>		
Number of referrals resulting in Program enrollment		1
Longest time to connect referral in days		53
Shortest time to connect referral in days		53
Average time to connect referral in days		53
<b>Denied Referrals</b>		
Number of denied referrals		1
Longest time to deny a referral in days		28
Shortest time to deny a referral in days		28
Average time to deny a referral in days		28
<b>Breakdown Of Most Common Denied Referral Reasons</b>		
Client refused services		1

## Breakdown Of Referred Programs

NOTE: P - Pending; P/I - Pending - In process; A - Accepted; D - Denied.

### PH - Permanent Supportive Housing (disability required)

Agency Name	Program Name	P	P/I	A	D
Sarah Smith Housing Services	Test PSH Program	1	0	0	0
Sarah Smith Housing Services	Youth Hope Housing	0	0	0	1

### PH - Rapid Re-Housing

Agency Name	Program Name	P	P/I	A	D
Housing Test Agency	Rapid Rehousing	0	0	1	0

Thu Dec 27 06:35:56 AM 2018

1/1  
 Powered By  CLARITY  
 HUMAN SERVICES



# Program Roster

[GNRL-106] Program Roster (Program Based Report)

- ▶ Who's stayed in the program
- ▶ Lists program stay information for clients with the selected status in the selected program

# Program Roster

## Program Roster Report

### Sarah Smith Housing Services

Active within [08/01/2018 - 12/27/2018]

Housing Move-in: Undefined = Unknown HoH or Move-in is Null,  = Non PH Project

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	Assess-ments	Services	Assigned Staff
<b>Program: Youth Hope Housing</b>											
Test, Visibility	00948F75C	01/01/1998	20	20	12/18/2018	-	10	undefined	0	0	S. Dougherty

Total: 1

Program Name	Project Type	Project Applicability
Youth Hope Housing	PH - Permanent Supportive Housing (disability required)	Permanent Housing for Disabled Homeless Persons [SHP-PH]

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# Program Details

## [GNRL-220] Program Details Report

- ▶ Who's enrolled in the project
- ▶ Returns all the fields and corresponding responses for selected screens.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Unique ID	First Name	Last Name	Agency	Assigned Staff	Staff Created	Enrollment Start Date	Enrollment Exit Date	Chronic Homeless	Housing Service	Housing Service Start Date	Housing Service End Date	DOB	SSN	Personal
2	19C94E6C0	Peter	Pine	[TRAINING] HSH: SFHOT	Aaron Court	Aaron Court	08/05/2020		N				08/03/1982	332-21-2212	919
3	74E0A28D6	Rose	Bush	[TRAINING] HSH: SFHOT	Aaron Court	Aaron Court	08/07/2020		Y				01/01/1996	888-99-9898	993
4															
5															
6															
7															
8															
9															
10															
11															
12															
13															
14															

*\* Please note this report is only available in .zip files.*



# Next Steps

\*Go live\* November 11th

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

# 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](mailto:helpdesk@cafth.org)

# Questions

