Assessor Workflow

Memphis Coordinated Entry

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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

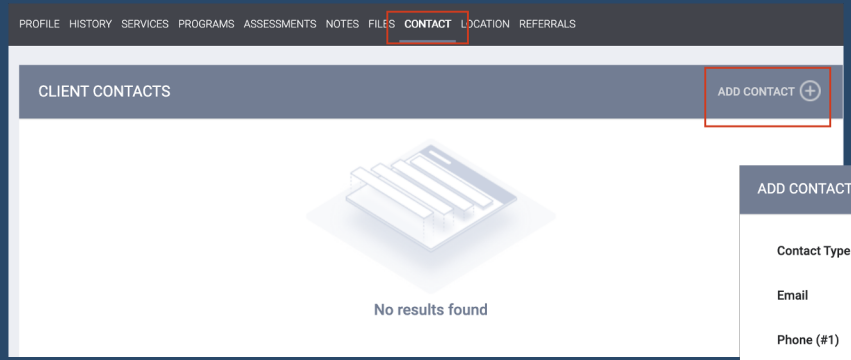
Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

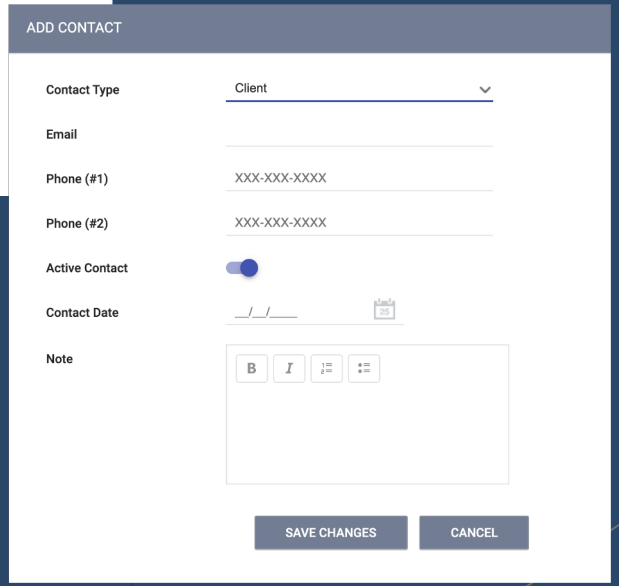
Contact Information

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Contact Information





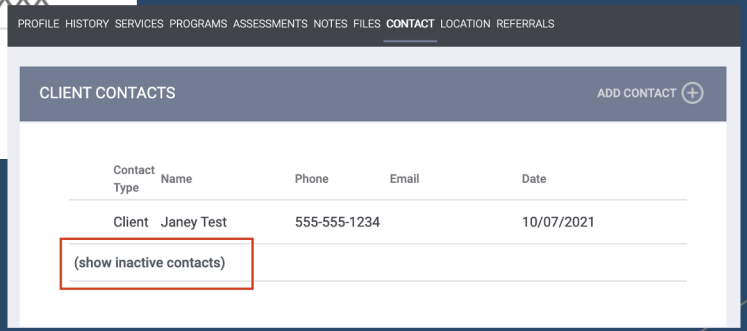
Record contact information under the *Contact Tab*.

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Contact Information

- Disable the "Active Contact" toggle when information becomes out of date.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



Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

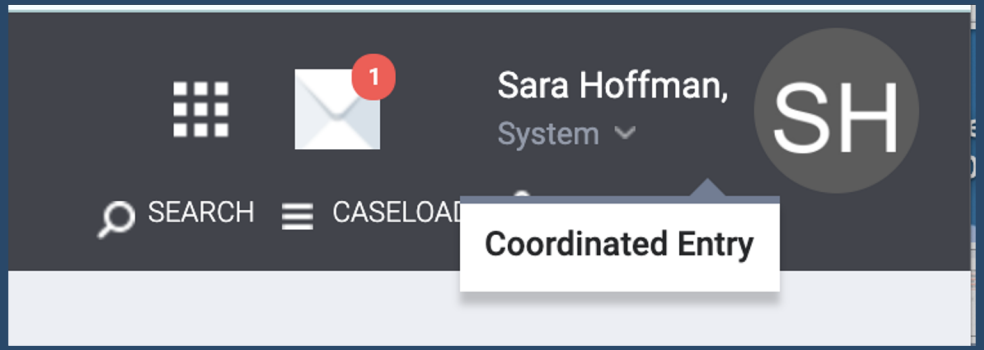
Switching Agencies

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Switching Agencies

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



Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Coordinated Entry Enrollment

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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.

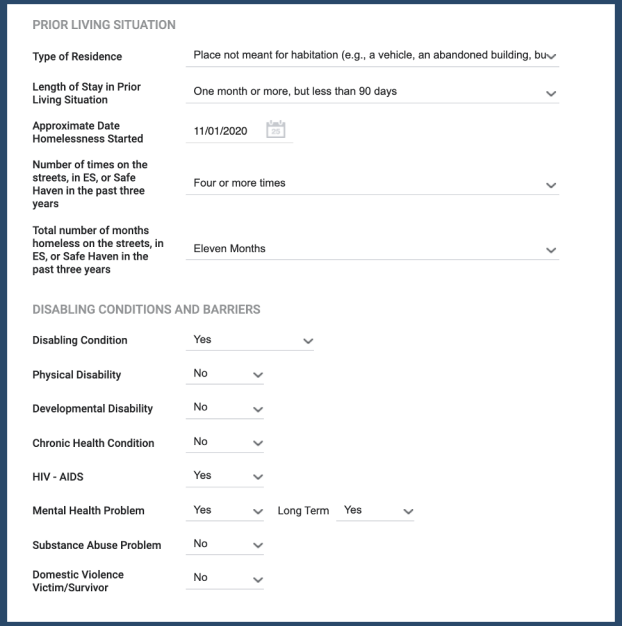
Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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.



Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Current Living Situation

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Bitfocus

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

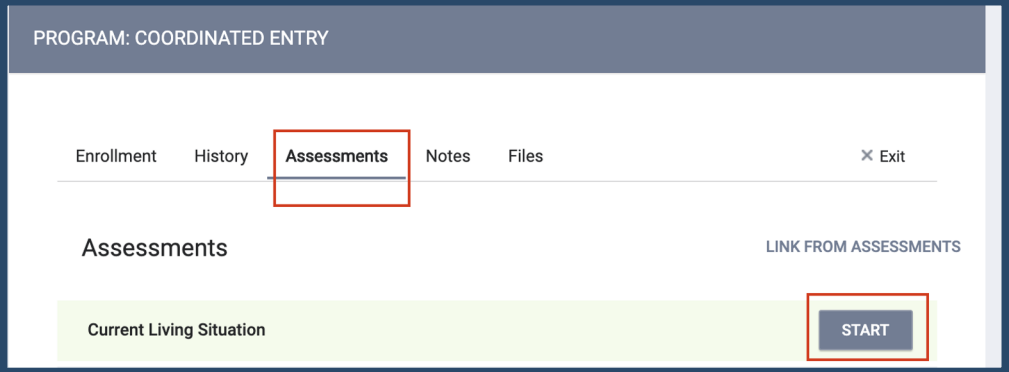
- Project start
- A CE Assessment or CE Event is recorded
- The client's living situation changes
- If a CLS hasn't been recorded for longer than 60 days

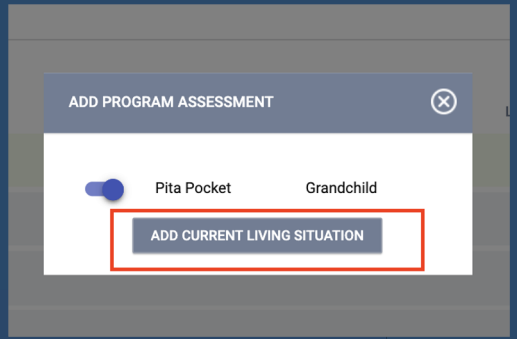
**Note: If two of the above occur on the same day, you only enter one CLS.*

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Current Living Situation Assessment





Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Bitfocus

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

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

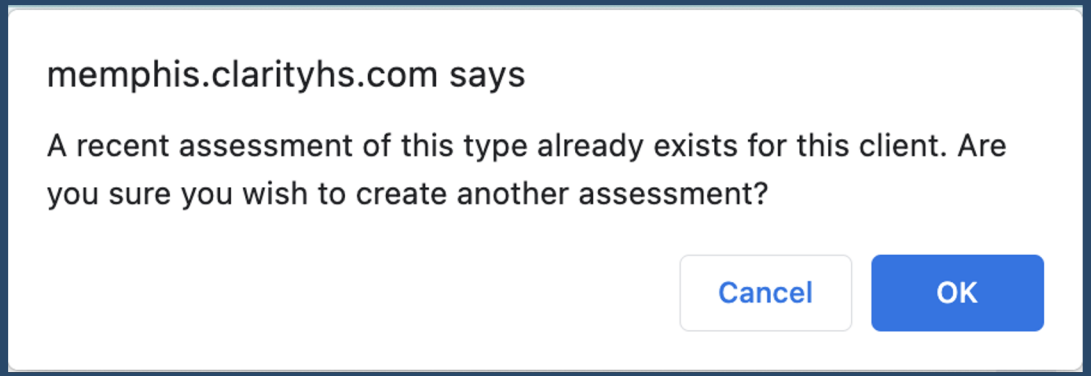
Coordinated Entry Assessment

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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.



Bitfocus
Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

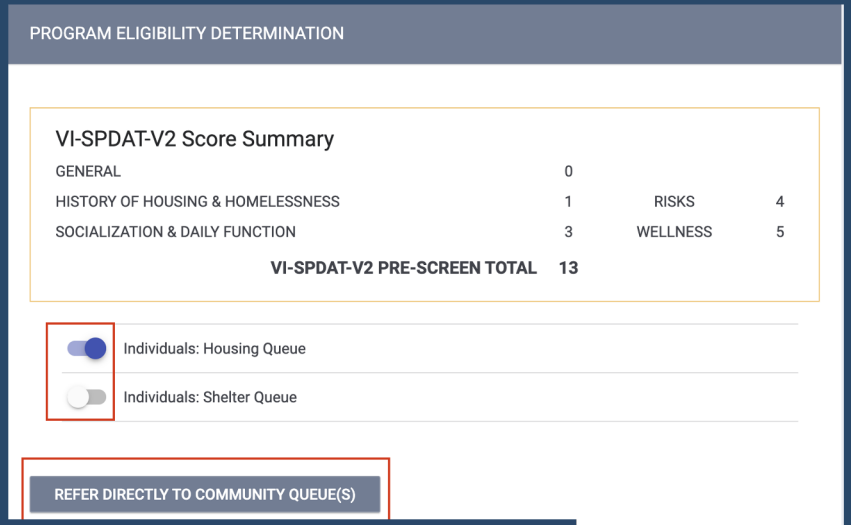
Referral to the Queue

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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.



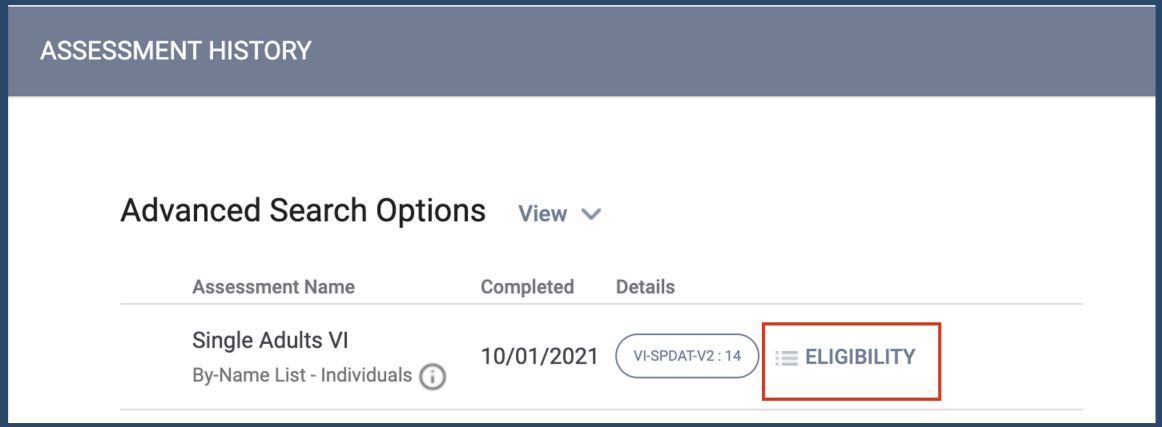
Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Bitfocus

Referral to the Community Queue

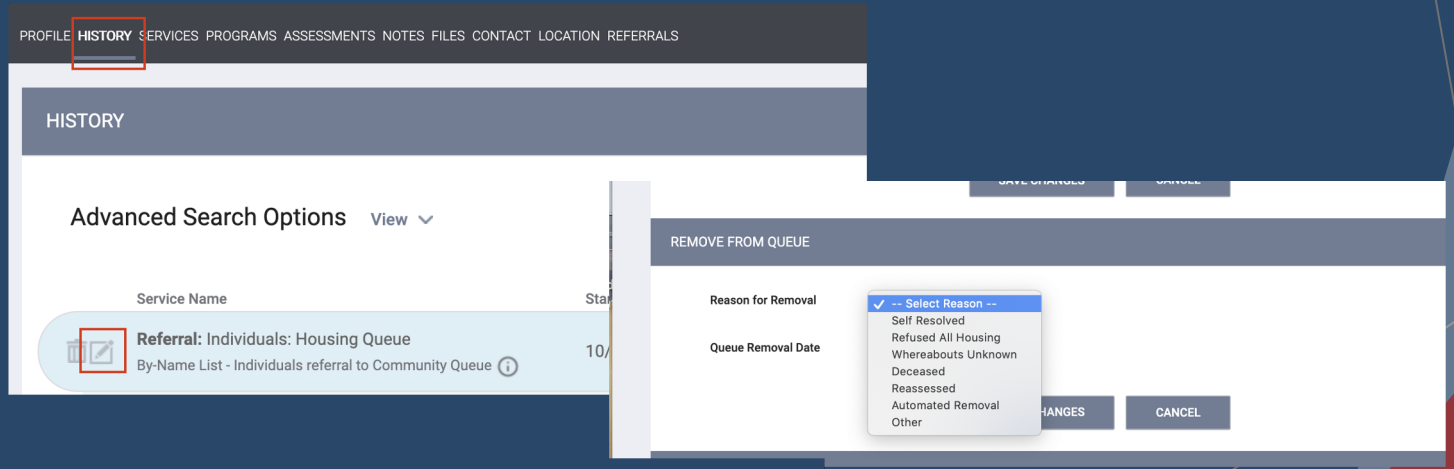
- An assessment can be added to the queue at a later time through the *Eligibility Determination Screen.*



Bitfocus
Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved
Bitfocus

Removal from the Community Queue

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



Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Bitfocus

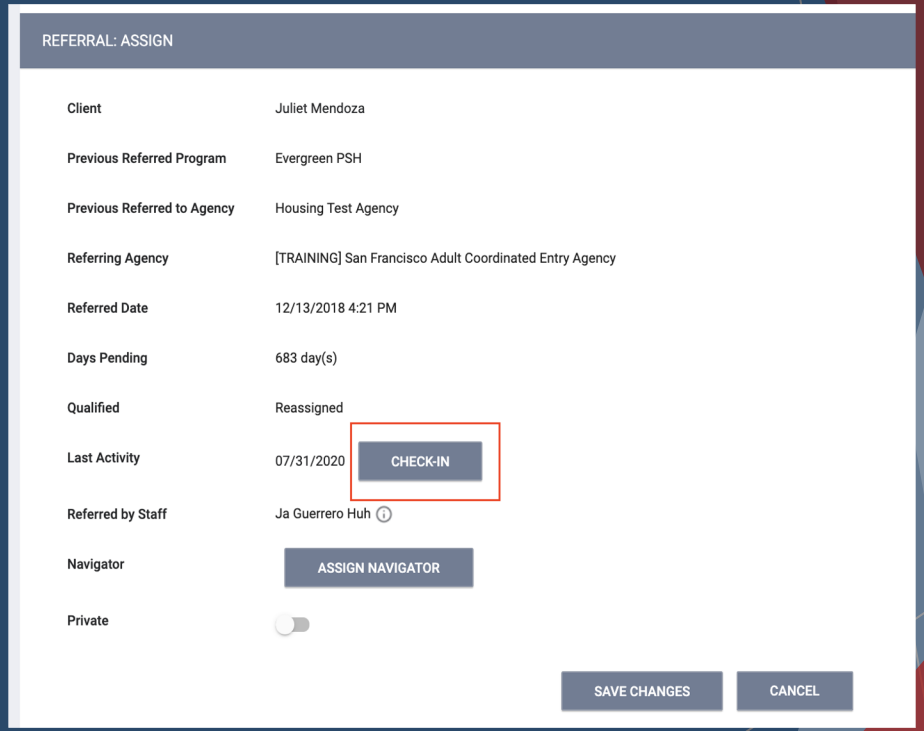
Check-ins

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Check-ins

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



Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Coordinated Entry Events Services

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Coordinated Entry Event Services

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

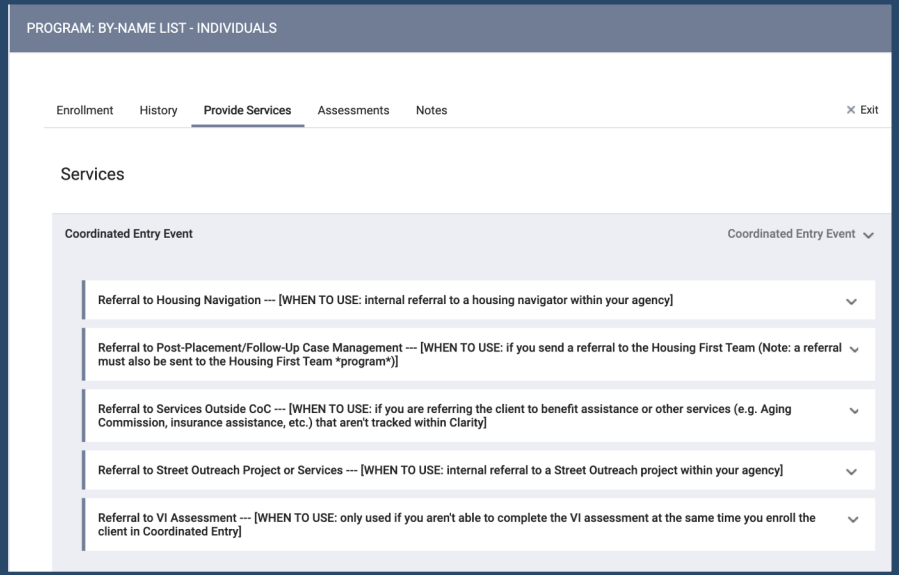
- Required as part of the 2020 HUD Data Standards.
- Services under the coordinated entry programs are categorized as CE Events.
- CE Events are essential to keeping a client active in the CE program.
  - Clients with no activity for 90 days will be auto-exited.

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

CE Event Services

- Services should be recorded when the activity occurs.

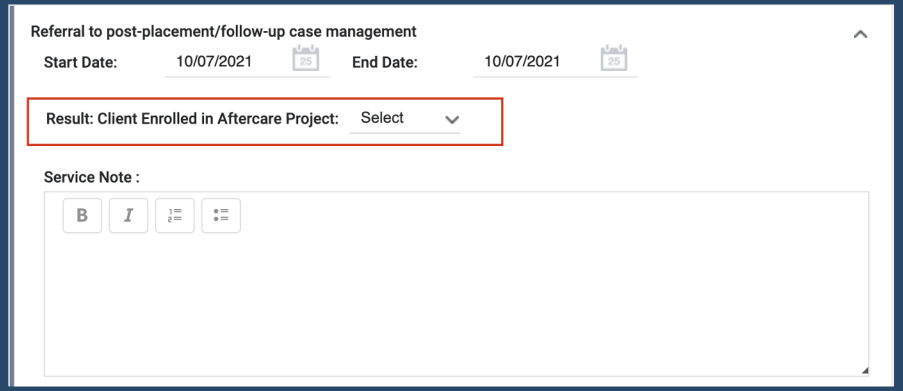


Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

CE Event Services

- Some services may contain a results field.



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

Bitfocus

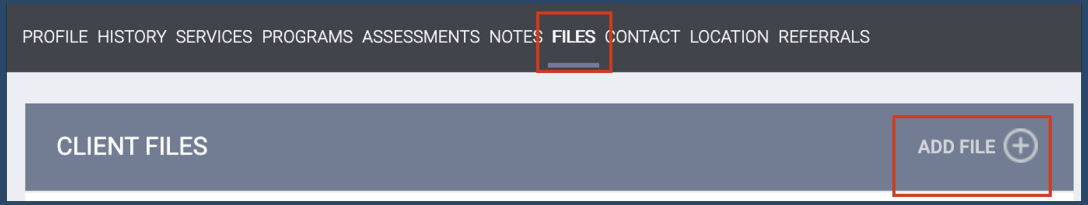
Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Uploading Documents

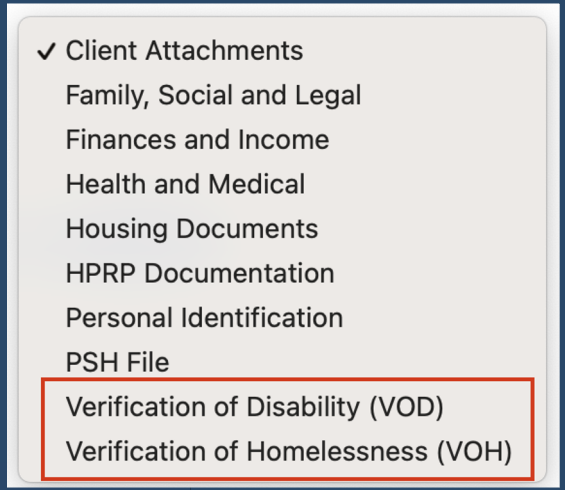
Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Uploading Documents



- Client documents should be uploaded under the *Files Tab.*
- Select the category Verification of Disability or Verification of Homelessness.



Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Program Exits

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Exits

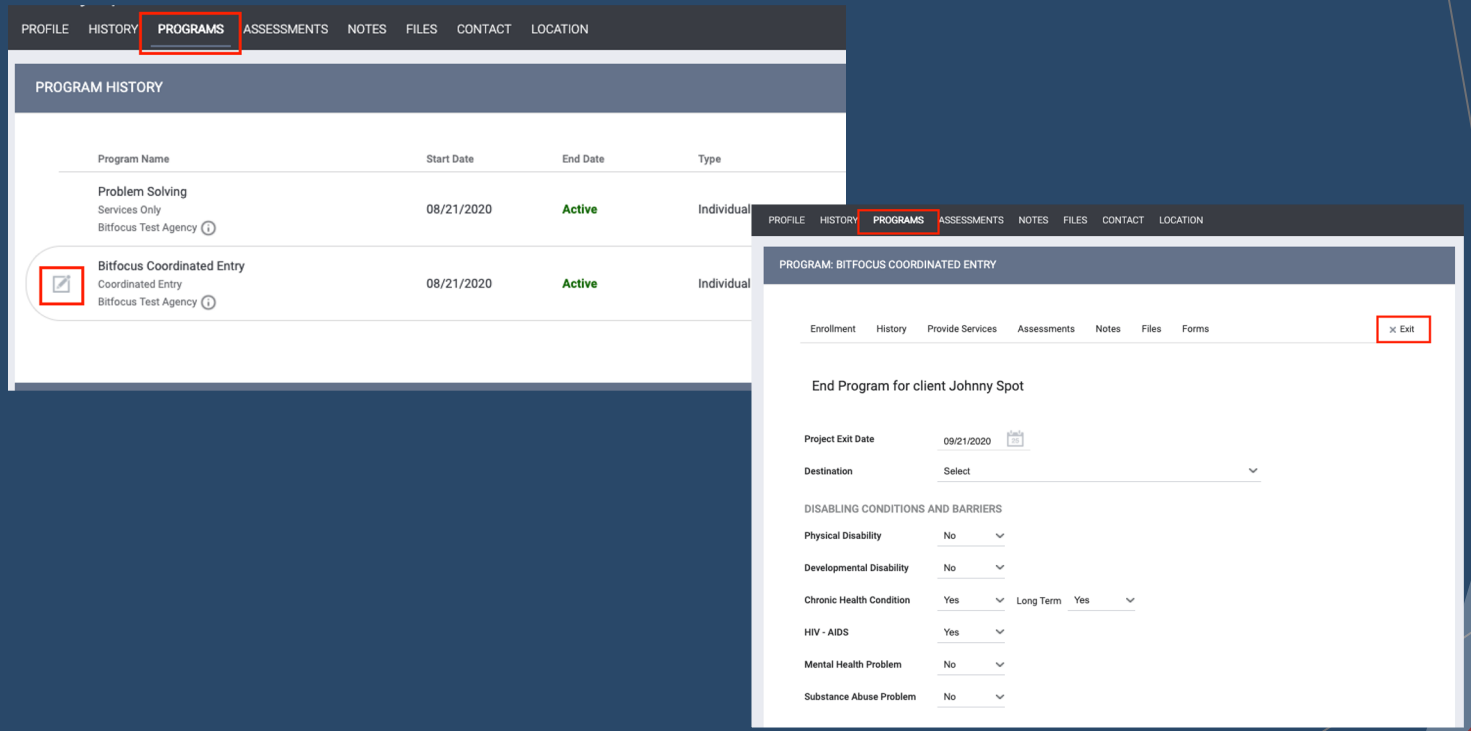
- A program exit indicates the end of a client's engagement in the coordinated entry process.
- A client should be exited from coordinated entry for the following reasons:
  - Obtained permanent housing
  - Left the CoC
  - Deceased
  - Declined all services

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Bitfocus

Exits



Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Bitfocus

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.

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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 5/16/22. Will the client be automatically exited?

Answer = Yes

2. The client has been enrolled in a Rapid Rehousing program on 5/1/22. No move-in date has been entered.

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

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Recap

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Let’s Talk Reports

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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.

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

CE Assessing Staff Report

CE Assessing Staff Report

Bitfocus Coordinated Entry Agency
08/01/2020 - 10/02/2020

Kadra Adderly: **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
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Without	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Bitfocus Coordinated Entry	[illegible]

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

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

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved

Questions?

Bitfocus

Confidential and Proprietary | © 2022 Bitfocus Inc., All Rights Reserved