

# Assessor Workflow

Memphis Coordinated Entry



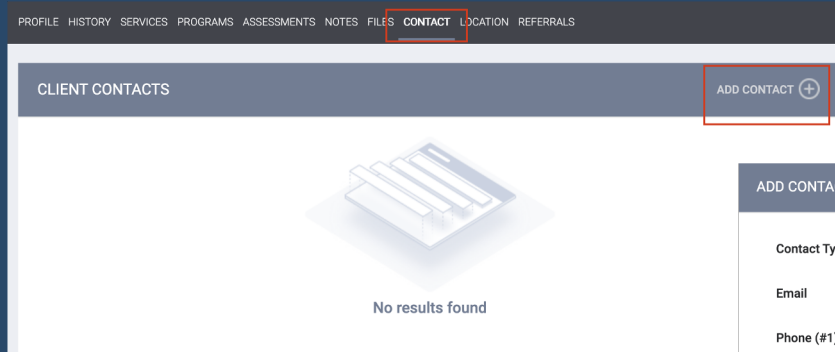
# Agenda

- ▶ 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



A screenshot of the 'ADD CONTACT' modal form. The form contains the following fields and controls:

- Contact Type:** A dropdown menu with 'Client' selected.
- Email:** A text input field.
- Phone (#1):** A text input field with the placeholder 'XXX-XXX-XXXX'.
- Phone (#2):** A text input field with the placeholder 'XXX-XXX-XXXX'.
- Active Contact:** A toggle switch that is currently turned on (blue).
- Contact Date:** A date picker field showing '//' and a calendar icon.
- Note:** A rich text editor with buttons for Bold (B), Italic (I), Bulleted List (≡), and Numbered List (≡).

At the bottom of the modal are two buttons: 'SAVE CHANGES' and 'CANCEL'.

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- ▶ Disable the “Active Contact” toggle when information becomes out of date.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) 555-555-1234

Phone (#2) XXX-XXX-XXXX

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)

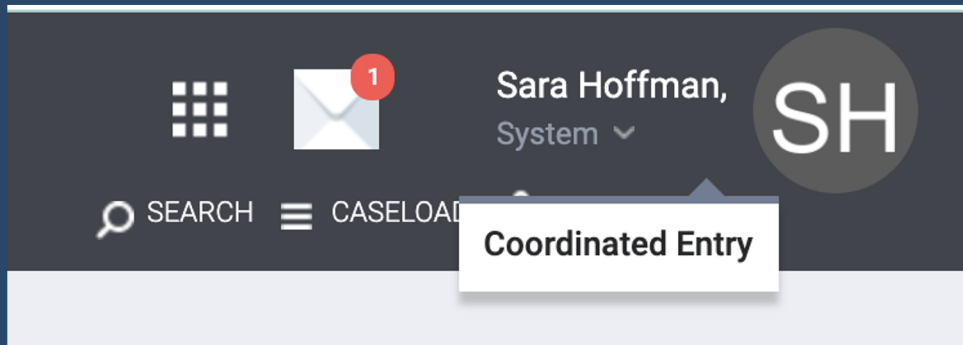


# Switching Agencies



# Switching Agencies

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



# 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	▼

# 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... <input type="text"/>
Length of Stay in Prior Living Situation	One month or more, but less than 90 days <input type="text"/>
Approximate Date Homelessness Started	11/01/2020 <input type="text"/>
Number of times on the streets, in ES, or Safe Haven in the past three years	Four or more times <input type="text"/>
Total number of months homeless on the streets, in ES, or Safe Haven in the past three years	Eleven Months <input type="text"/>
DISABLING CONDITIONS AND BARRIERS	
Disabling Condition	Yes <input type="text"/>
Physical Disability	No <input type="text"/>
Developmental Disability	No <input type="text"/>
Chronic Health Condition	No <input type="text"/>
HIV - AIDS	Yes <input type="text"/>
Mental Health Problem	Yes <input type="text"/> Long Term Yes <input type="text"/>
Substance Abuse Problem	No <input type="text"/>
Domestic Violence Victim/Survivor	No <input type="text"/>

# 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.

## Assessments

LINK FROM ASSESSMENTS

Families VI	START
Youth VI	START
Single Adults 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
<b>VI-SPDAT-V2 PRE-SCREEN TOTAL</b>			<b>13</b>

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 <b>ELIGIBILITY</b>

# Removal from the Community Queue

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

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

HISTORY

Advanced Search Options View ▾

Service Name	Status
<b>Referral: Individuals: Housing Queue</b> By-Name List - Individuals referral to Community Queue ⓘ	10/

REMOVE FROM QUEUE

Reason for Removal

Queue Removal Date

-- Select Reason --  
Self Resolved  
Refused All Housing  
Whereabouts Unknown  
Deceased  
Reassessed  
Automated Removal  
Other

CHANGES CANCEL

# 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 <span>CHECK-IN</span>
Referred by Staff	Ja Guerrero Huh ⓘ
Navigator	<span>ASSIGN NAVIGATOR</span>
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

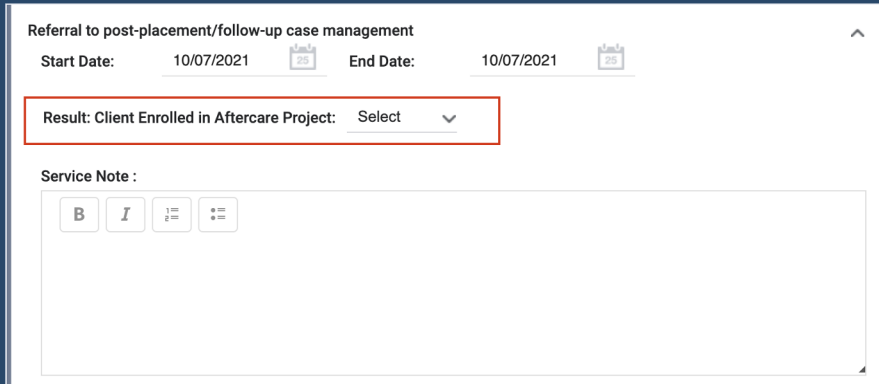
Coordinated Entry Event Coordinated Entry Event ▾

- 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 :

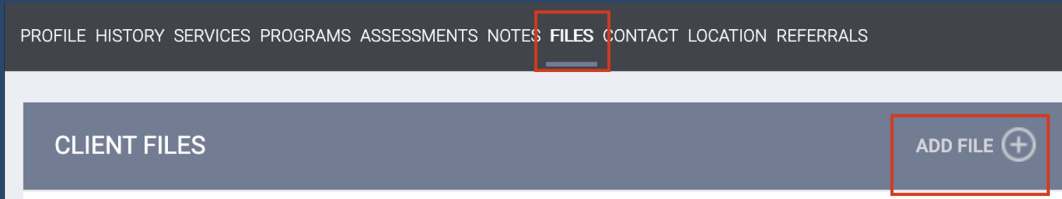
*\*Remember\* Every time a CE event is recorded, you must enter a Current Living Situation.*



# 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
<b>Problem Solving</b> Services Only Bitfocus Test Agency ⓘ	08/21/2020	Active	Individual
 <b>Bitfocus Coordinated Entry</b> 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 

End Program for client Johnny Spot

Project Exit Date 09/21/2020 

Destination

DISABLING CONDITIONS AND BARRIERS

Physical Disability

Developmental Disability

Chronic Health Condition  Long Term

HIV - AIDS

Mental Health Problem

Substance Abuse Problem



# 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 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.*)

# 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

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	Sub-scores				
																		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	Age and Household Size	Current Housing Situation	Sub-scores			
																		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 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
08/05/2020	Test, Sara	88BC234E	21	Female	No	Without Children	1	0	CE- Housing Assessment	100		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](mailto:helpdesk@cafth.org)

# Questions?

