

Coordinated Entry HMIS Reference Guide for Providers



Last Revised: 11/11/2021

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1. Log-in

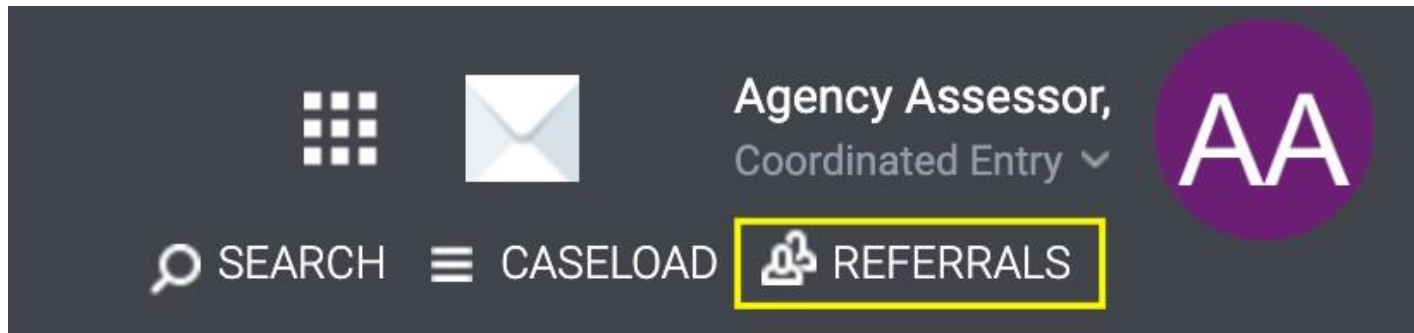
The Memphis HMIS website is memphis.clarityhs.com/login. If you have any trouble logging on, resetting your password, or completing two-factor authentication. Please submit an email to the CAFTH Help Desk, at helpdesk@cafth.org.



The image shows a login page for Clarity Human Services. At the top left is the logo, which consists of a stylized diamond icon followed by the text "CLARITY HUMAN SERVICES". Below the logo are two input fields: "Username" and "Password", each with a horizontal line underneath. Centered below these fields is a dark blue button with a white padlock icon and the text "SIGN IN". Below the button is a link that says "FORGOT PASSWORD?". The entire login form is set against a white background with a subtle geometric pattern, which is itself centered on a larger, light gray background with a similar pattern.

2. Accessing the Community Queue

After logging into Clarity, the home screen for your agency will always appear as below. In order to access the Community Queue, navigate to the top right of the page. There will be a link named "REFERRALS." Click on it to enter the Community Queue.



Accessing the Community Queue (continued)

On the next page, there will be tabs that offer clients who are currently on the Community Queue, meaning clients enrolled in Coordinated Entry and referred to the Community Queue but not yet referred to housing. Other tabs include: Pending, where clients referred to housing but not yet accepted into housing will show; Completed, where clients referred to housing and accepted to housing will show; and Denied, where clients referred to housing but not accepted by the housing program will show. Below, we can see that the client Avery Apple is sitting on the Individuals: Housing Queue, waiting to be referred to the next housing opening.

The screenshot displays the REFERRALS interface. At the top, there are tabs for Pending, Community Queue, Completed, Denied, Sent, and Availability. The Community Queue tab is active. Below this, there are sub-tabs for Families: Housing Queue, Families: Shelter Queue, Individuals: Housing Queue (selected), and Individuals: Shelter Queue. A search bar is present, along with filters for Mode (Standard) and Sort By (Default). An 'Eligible Clients Only' toggle is turned off. A 'SEARCH' button is located on the right. The main content is a table with columns for Client, Referral Date, and Days Pending. The client Avery Apple is highlighted with a blue border.

Client	Referral Date	Days Pending
Timothy Tennessee Referred by: Coordinated Entry ⓘ	10/15/2021	24
Sara Test Referred by: Coordinated Entry ⓘ	10/15/2021	24
Melvin Murphy Referred by: Coordinated Entry ⓘ	10/26/2021	13
Jose Testersen Referred by: System	10/27/2021	12
Maegan Memphis Referred by: Coordinated Entry ⓘ	11/01/2021	7
Avery Apple Referred by: Coordinated Entry ⓘ	11/08/2021	0

3. Posting a Housing Opening to the Community Queue

To post an opening for housing in one of your programs, click on the 'Availability' tab inside the Community Queue. If you cannot see the Availability tab and have received the Provider training, please contact the help desk (helpdesk@cafth.org) in order to gain access.

First - Select the correct housing queue. For this example, we are working with individual or single adult clients we are hoping to get into housing, so we click on the 'Individuals: Housing Queue.'

Second - Review the programs listed inside this Queue to find the one that has an opening. In this example, we are posting an opening to the 'N. 2nd Housing Program.'

The screenshot shows a web interface for 'REFERRALS'. At the top, there is a dark blue header with the word 'REFERRALS' in white. Below this is a navigation bar with several tabs: 'Pending', 'Community Queue', 'Completed', 'Denied', 'Sent', and 'Availability'. The 'Availability' tab is currently selected and highlighted with a blue underline. Below the navigation bar, the text 'Program Availability' is displayed. Underneath, there are four buttons representing different housing queues: 'Families: Housing Queue', 'Families: Shelter Queue', 'Individuals: Housing Queue', and 'Individuals: Shelter Queue'. The 'Individuals: Housing Queue' button is highlighted with a blue border. Below these buttons, there is a list of programs. The first program listed is 'N. 2nd Housing Program', which is also highlighted with a blue border. To the right of the program name, there are three radio button options: 'FULL AVAILABILITY', 'LIMITED AVAILABILITY', and 'NO AVAILABILITY', followed by a small downward-pointing arrow icon.

Posting a Housing Opening to the Community Queue (continued)

Third - Click the dropdown arrow beside the program. You may see there are already some openings posted, or possibly that an opening has been reserved; a reserved opening simply means that a client was already referred to an opening and is pending enrollment.

Confirm your opening isn't already listed.

Fourth - Select the plus sign to add either a single opening or multiple openings. Multiple openings can be used if there are several program openings for the same program that do not require additional information, such as a RRH program.

The screenshot displays a web interface for a housing program. At the top, it is titled "N. 2nd Housing Program" with tabs for "FULL AVAILABILITY", "LIMITED AVAILABILITY", and "NO AVAILABILITY". Below the title, there is a section for "AVAILABLE OPENINGS" with a date of "11/09/2021" and edit/delete icons. The details for this opening are: "Unit Number or : 1", "Description", "Neighborhood : Midtown", and "Description (e.g. Midtown, Raleigh)". Below this is a section for "RESERVED OPENINGS" with a table:

Opening	Client	Referred Date
06/01/2021 Apartment 1	Maegan Memphis Referred by: Coordinated Entry	11/01/2021

At the bottom, there are two buttons: "ADD SINGLE OPENING" and "ADD MULTIPLE OPENINGS", both highlighted with a blue box.

Posting a Housing Opening to the Community Queue (continued)

Fifth - Complete the form to the best of your ability and click 'Save.' After, you should see your opening posted with the information you provided.

ADD AN OPENING ✕

Date

Additional Notes

Unit Number or Description

Neighborhood Description (e.g. Midtown, Raleigh)

Shared Living (SRO - private room and shared bathroom/common spaces)

Individual apartment (scattered site)

Individual apartment (site-based)

Townhouse or Duplex

Are there stairs to enter the unit or are there stairs in the unit?

ADA accessible unit?

Maximum family/household size

Background Check Restrictions (e.g. RSO):

N. 2nd Housing Program FULL AVAILABILITY LIMITED AVAILABILITY NO AVAILABILITY ^

AVAILABLE OPENINGS

11/09/2021 ✎ ✕

Unit Number or Description : 1
Neighborhood Description : Midtown
(e.g. Midtown, Raleigh)
Shared Living (SRO - private room and shared bathroom/common spaces) : No
Individual apartment (scattered site) : Yes
Individual apartment (site-based) : No
Townhouse or Duplex : No
Are there stairs to enter the unit or are there stairs in the unit? : No
ADA accessible unit? : Yes
Maximum family/household size : 4
Background Check Restrictions (e.g. RSO): No

4. Receiving Client Referrals from the Community Queue

Now that a program opening has been shared, a client may be referred by CAFTH’s matchmaker from the By-Name List on the Community Queue and to your program. There are two ways for seeing a referral has been made. If you are a designated contact, you will receive an email to the email address associated with your account and to the email inside Clarity. The emails will look identical and will link to the client that has been referred. *If you do not receive these emails, but are the Provider enrolling clients, reach out to the help desk (helpdesk@cafth.org) in order to be added as a designated contact.*

The second way to see referrals that have been made is to simply check the Community Queue. Navigate back to the Queue by going to the Clarity search page, and click ‘Referrals.’ The default page will be the ‘Pending’ referrals tab and you will see every client that has been referred to your program. Here, let’s review the steps necessary to enroll Avery Apple.

The screenshot shows the 'REFERRALS' section of a web application. At the top, there is a dark blue header with the word 'REFERRALS' in white. Below this, there are several tabs: 'Pending', 'Community Queue', 'Completed', 'Denied', 'Sent', and 'Availability'. The 'Pending' tab is currently selected. Underneath the tabs, the text 'Pending Referrals' is displayed. There is a search bar with a 'Search' button, a 'Sort By' dropdown menu set to 'Default', and a 'Mode' dropdown menu set to 'Standard'. A toggle switch labeled 'Eligible Clients Only' is also present. Below these controls is a table with the following data:

Client	Referral Date	Qualified	Days Pending
Maegan Memphis Program: N. 2nd Housing Program Referred by: Coordinated Entry ⓘ	11/01/2021	Reassigned	8 total 0 pending 0 in process
Avery Apple Program: N. 2nd Housing Program Referred by: Coordinated Entry ⓘ	11/08/2021	Reassigned	1 total 0 pending

Receiving Client Referrals from the Community Queue (continued)

After clicking on Avery Apple's record, their client information will open. On this page, you will see information about the referral, client score, client notes, and their history on the Queue. For now, the most important place to look is 'Status,' where we see Avery Apple is 'Pending.'

To show that Avery Apple's referral has been seen, change the status from 'Pending' to 'Pending - In Progress.' This will alert CAFTH's matchmaker that the client will be entering your program in the next 30 days.

REFERRAL: EDIT

Client	Avery Apple
Referred Program	N. 2nd Housing Program
Referred Program Opening	11/09/2021
Referred to Agency	Community Alliance for the Homeless
Referring Agency	Coordinated Entry
Referred Date	11/08/2021 8:00 PM
Days Pending	1 day(s)
In Process	0 day(s)
Qualified	Reassigned
VI-SPDAT-V2 score	7
Referred by Staff	Scott Gloden
Case Manager	Select <input type="text"/>
Last Activity	11/08/2021 <input type="button" value="CHECK-IN"/>
Status	Pending <input type="text"/>
Private	<input type="checkbox"/>

Status

Private

✓ Pending

Pending - In Progress

Denied

Expired

Receiving Client Referrals from the Community Queue (continued)

After a client has been moved from 'Pending' to 'Pending - In Progress,' you can navigate back to the client's main profile page outside the Community Queue, and enroll the client as you normally would.

NOTE: Highlighted in red is the End Date for Coordinated Entry. After clients are enrolled in a housing program *AND* have a housing move-in date entered, the client will be auto-exited from Coordinated Entry. There is nothing else that needs to be done for that enrollment.

Avery Apple

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

PROGRAM HISTORY

Program Name	Start Date	End Date	Type
Coordinated Entry Coordinated Entry Coordinated Entry	11/08/2021	Active	Individual

PROGRAMS: AVAILABLE

- Bitfocus Shelter
- January 2021 Test Agency
- N. 2nd Housing Program

STOP. Please read the following.

At this time:

- a housing opening has been posted,
- a client referred to your opening has been acknowledged and made 'pending in-progress,'
- and then enrolled in a program.

At this time, there is nothing else that needs to be done by the Provider.

Clients who receive a Housing Move-In Date after being enrolled in a housing program will be automatically exited from the Coordinated Entry program *AND* exited from the Community Queue.

For any questions/concerns, don't hesitate to reach out the help desk (helpdesk@cafth.org)