

# YHDP Coordinated Entry HMIS Reference Guide for Assessors & Navigators



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## 1. Log-in

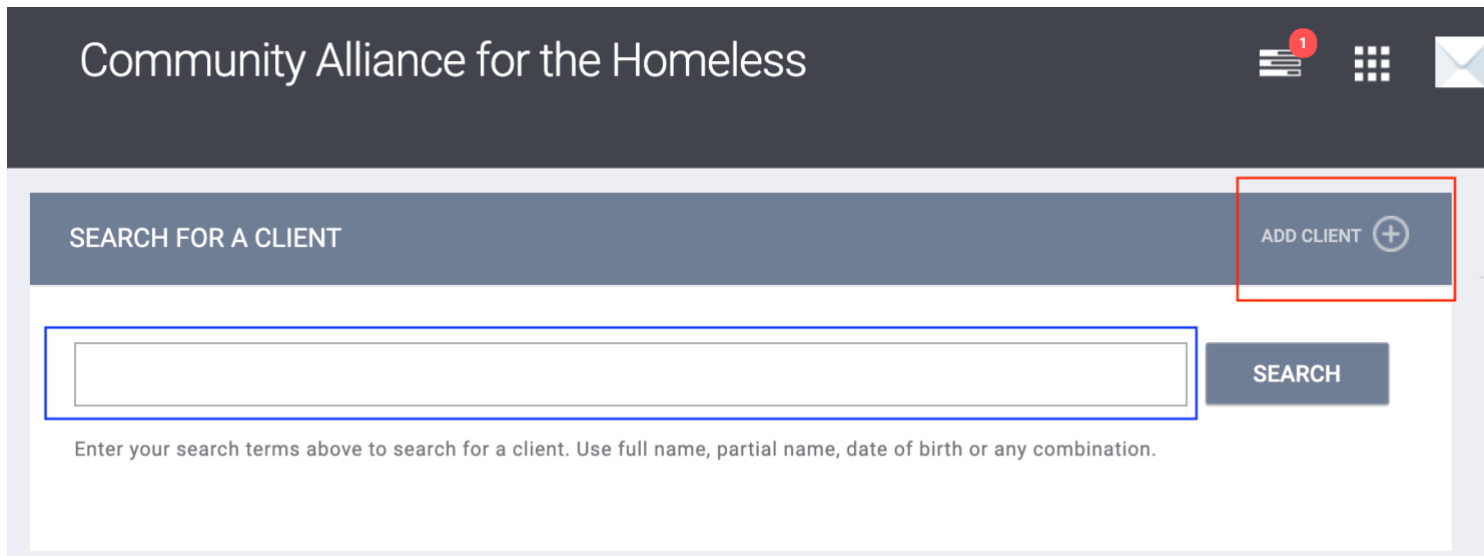
The Memphis HMIS website is [memphis.clarityhs.com/login](http://memphis.clarityhs.com/login). If you have any trouble logging on, resetting your password, or completing two-factor authentication. Please submit an email to the CAFTH Help Desk, at [helpdesk@cafth.org](mailto:helpdesk@cafth.org).



The image shows a login page for Clarity Human Services. At the top, there is a logo consisting of a diamond icon and the text "CLARITY HUMAN SERVICES". Below the logo are two input fields: "Username" and "Password". A dark blue button with a lock icon and the text "SIGN IN" is positioned below the password field. Underneath the button is a link that says "FORGOT PASSWORD?". The entire login form is centered on a white background with a subtle geometric pattern.

## 2. Search/Create a Client

After logging into Clarity, the home screen for your agency will always appear as below. If you're looking to see a client's information who is already in HMIS, you can search their name in the search bar marked in blue. To find a client, type in their first and last name, their unique ID, or, if you're uncertain of how to spell their name, partial letters. If you're confident the client is new to HMIS, click the "ADD CLIENT" button marked in red.



## Create a Client (continued)

In this example, a new client is entering the system and must have universal data elements (SSN/DoB/Demographics) accounted for, along with a release of information (ROI) submitted or refused.

### Coordinated Entry

Agency Assessor, Coordinated Entry **AA**

SEARCH CASELOAD

#### CREATE A NEW CLIENT

Social Security Number	____ - ____ - ____
Quality of SSN	Select <input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Quality of Name	Select <input type="text"/>
Quality of DOB	Select <input type="text"/>
Date of Birth	__/__/____
Middle Name	<input type="text"/> None <input type="text"/>
Gender	Select <input type="text"/>
Race	Select <input type="text"/>
Ethnicity	Select <input type="text"/>

Please fill in Release of Information form

#### RELEASE OF INFORMATION

Permission	Yes <input type="text"/>
Start Date	11/08/2021 <input type="text"/>
End Date	11/08/2024 <input type="text"/>
Documentation	Select <input type="text"/>


#### CONSENT REFUSED

Consent Refused

## Create a Client (continued)

Below is an example of Avery Apple.










# Avery Apple


Agency Assessor, Coordinated Entry 

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS




SEARCH CASELOAD

### CLIENT PROFILE

Social Security Number	XXX - XX - 0011 
Quality of SSN	Approximate or partial SSN reported 
Last Name	Apple
First Name	Avery
Quality of Name	Full name reported 
Quality of DOB	Full DOB Reported 
Date of Birth	12/19/1981 <span>Adult. Age: 39</span>
Middle Name	None 
Gender	Male 
Race	White 
Ethnicity	Non-Hispanic/Non-Latin(a)(o)(x) 
Veteran Status	No 



UNIQUE IDENTIFIER  
**051B3AC79**

#### Household Members

[Manage](#)

No active members

#### Care Team 0

[Manage](#)

No active members

### 3. Complete a YHDP Assessment

To complete a YHDP Assessment, click on the Assessments tab under the client profile. Click “Start” next to YHDP Assessment and complete the assessment.

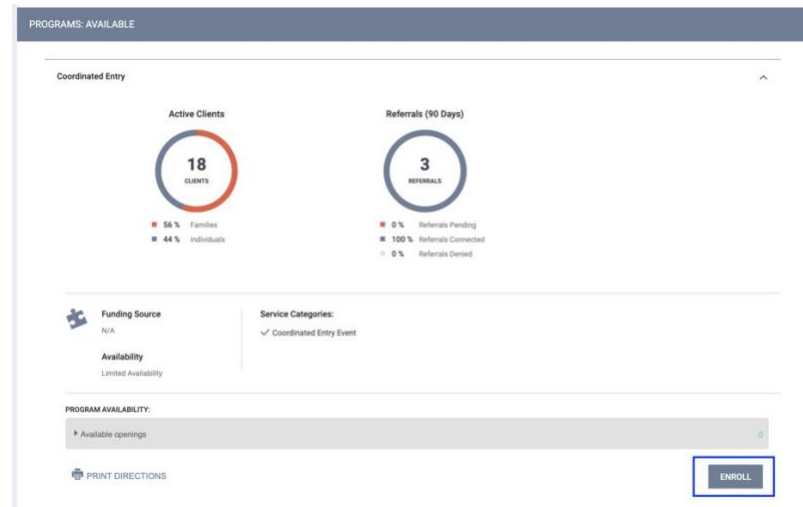
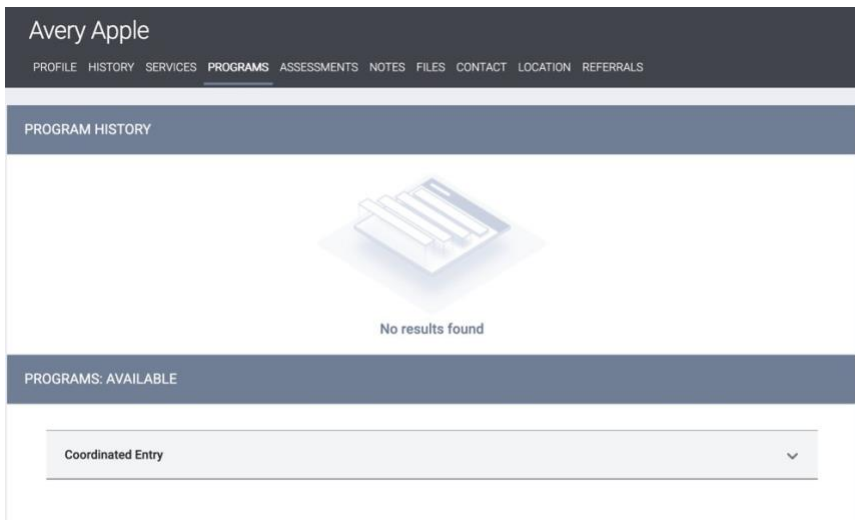
The screenshot displays the 'Test Tester' client profile interface. At the top, a dark navigation bar contains the client name and a menu of tabs: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS (highlighted with a red box), NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, a section titled 'ASSESSMENTS' lists three available assessments, each with a 'START' button:

- Consumer Satisfaction Survey
- COVID-19 Screening Tool
- YHDP Assessment

Below the 'ASSESSMENTS' section is an 'ASSESSMENT HISTORY' section. It features a light blue bar chart icon and the text 'No results found'.

#### 4. Enroll a Client into YHDP Coordinated Entry

To enroll a client into Coordinated Entry, first switch into the YHDP Coordinated Entry agency using the dropdown menu under your name in the upper right hand corner. Then click on the Programs tab under the client profile. From there, one program will be available. Click on the dropdown to open the enrollment tab, seen below. If the client has family members, be sure to click the toggle beside each name. Click 'Enroll.'







## Enroll a Client into YHDP Coordinated Entry (continued)


To enroll a client into Coordinated Entry, you must complete the standard enrollment screen, which looks at prior living situation, disabling condition, income, and insurance of the head of household. Click 'Save & Next.'

Enroll 'Coordinated Entry' program for client Avery Apple


Project Start Date  


**PRIOR LIVING SITUATION**


Type of Residence  


Length of Stay in Prior Living Situation  


**DISABLING CONDITIONS AND BARRIERS**


Disabling Condition  


Physical Disability  


Developmental Disability  

Chronic Health Condition  


HIV - AIDS  

Mental Health Disorder  


Substance Use Disorder  

Domestic Violence Victim/Survivor  


**MONTHLY INCOME AND SOURCES**

Income from Any Source  

**NON-CASH BENEFITS**

Receiving Non-Cash Benefits  

**HEALTH INSURANCE**

Covered by Health Insurance  

**ENROLLING PROGRAM**

Program Type: Individual

Head of Household: Avery Apple

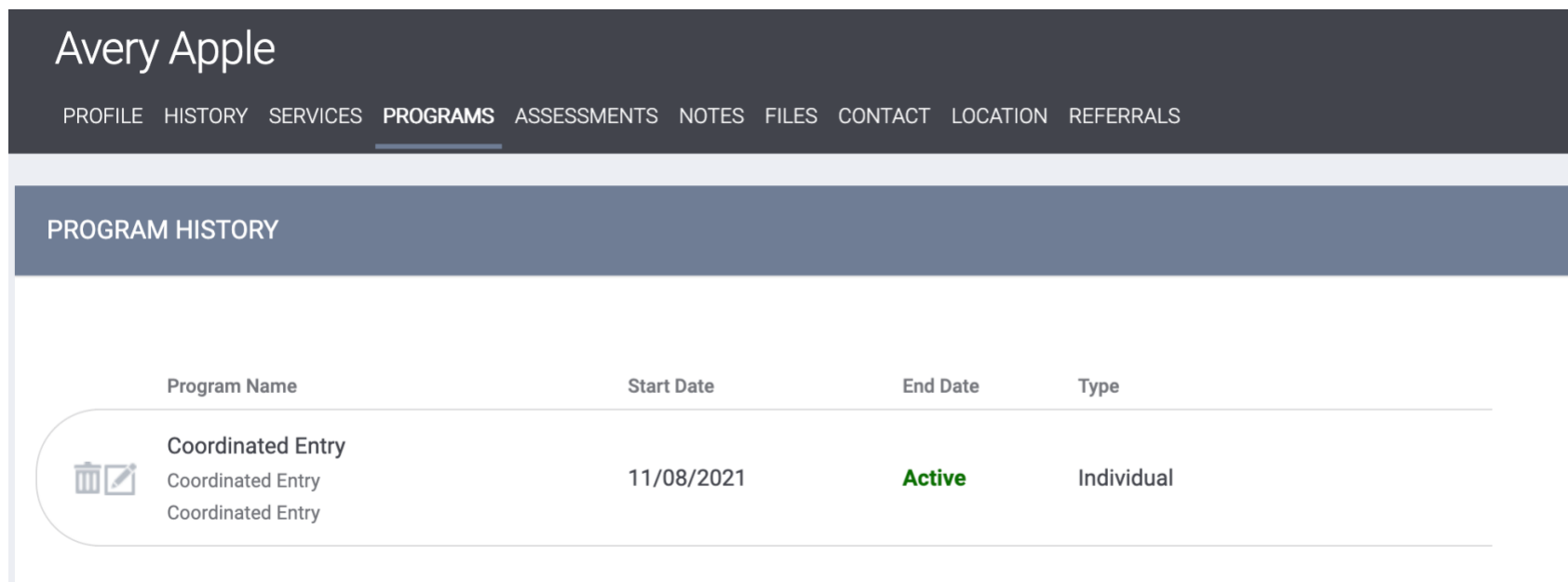
**Program Group Members**

No active members



## 5. Conduct an Assessment in a Program

Once a client is enrolled in a program, any assessment, such as the VI-SPDAT, must be conducted *inside* the program enrollment in order to be captured correctly for the Coordinated Entry APR. After enrollment, the next screen should default to the assessment page. If it does not, you can navigate to the assessment by clicking on the 'Programs' tab of the client's record.

Once there, hover over the program to locate the 'Edit' icon (beside the trash can) and click 'Edit'.



The screenshot shows the Avery Apple client record interface. At the top, the name "Avery Apple" is displayed. Below it is a navigation menu with tabs: PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. The main content area is titled "PROGRAM HISTORY" and contains a table with the following data:

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

## Conduct an Assessment in a Program (continued)

The next page that opens is the program's history screen. It shows a client's enrollment form, services tab, assessment tab, and exit form. Click on 'Assessments.'

The screenshot shows a web interface for 'Avery Apple'. At the top, a dark navigation bar contains the logo and a menu with items: PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. Below this, a header bar reads 'PROGRAM: COORDINATED ENTRY'. A secondary navigation bar includes 'Enrollment', 'History' (highlighted), 'Provide Services', 'Assessments', and 'X Exit'. The main content area is titled 'Program Service History' and features a 3D bar chart icon with the text 'No results found' below it. At the bottom, a legend identifies three categories: 'Reservation' (light green), 'Service' (light blue), and 'Referral' (medium blue).

## Conduct an Assessment in a Program (continued)

Below, you can see all the assessments possible for a client to have completed. Select either the TAY or the Families VI.

The screenshot displays a web application interface for a client's record. At the top, a dark blue header bar contains the text "PROGRAM: YHDP COORDINATED ENTRY". Below this is a horizontal navigation menu with tabs for "Enrollment", "History", "Provide Services", "Assessments", "Notes", and "Files". The "Assessments" tab is currently selected and underlined. To the right of the navigation menu is a "× Exit" button. The main content area is titled "Assessments" and includes a link labeled "LINK FROM ASSESSMENTS". Below the title, there is a list of three assessment options, each with a "START" button:

- Current Living Situation (highlighted in light green)
- Families VI
- TAY-VI-SPDAT [V2]

Assessment Name	Action
Current Living Situation	START
Families VI	START
TAY-VI-SPDAT [V2]	START


Conduct an Assessment in a Program (continued)


Lastly, along with the client, complete the assessment to the best of their ability.


**PROGRAM: COORDINATED ENTRY**


Enrollment   History   Provide Services   **Assessments**   [× Exit](#)


**SINGLE ADULTS VI**

**Assessment Date**   11/08/2021   


**Assessment Location**   Select   

**Assessment Type**   Select   

**Assessment Level**   Select   

**Primary Language**   Select   

**A. HISTORY OF HOUSING & HOMELESSNESS**

**Where do you sleep most frequently?**   Select   

## 6. Referring Clients to the Community Queue

Upon completion of the assessment, the default end screen is the Eligibility Screen. If the client has scored a 4 or higher on the VI, the client will be referred to the Individuals: Housing Queue for Rapid Re-Housing or Permanent Supportive Housing Support. If the client scores 3 or below, they should not be referred to the Community Queue.

To complete the referral, select the correct toggle and click 'Refer.'

The screenshot displays a web interface for program eligibility determination. At the top, a dark blue header reads "PROGRAM: YHDP COORDINATED ENTRY". Below this is a navigation bar with tabs for "Enrollment", "History", "Provide Services", "Assessments" (which is active), "Notes", and "Files", along with an "Exit" button. The main content area has a dark blue header "PROGRAM ELIGIBILITY DETERMINATION". A yellow-bordered box contains the "TAY-VI-SPDATv2 Score Summary" with the following data:

SECTION ONE: PRESENTING NEEDS	1	
SECTION TWO: HOUSING HISTORY & CHRONIC HOMELESSNESS DETERMINATION	1	SECTION THREE: VULNERABILITIES AND HOUSING SUPPORT NEEDS 7
<b>TAY-VI-SPDATv2 PRE-SCREEN TOTAL 9</b>		

Below the score summary, there is a toggle switch for "Individuals: Housing Queue" which is currently turned on. At the bottom, a dark blue button labeled "REFER DIRECTLY TO COMMUNITY QUEUE(S)" is visible.

Referring Clients to the Community Queue (continued)

Lastly, include any notes that may be relevant about the referral and then click 'Send.'

The screenshot shows the Avery Apple web application interface. At the top, the logo 'Avery Apple' is displayed in white on a dark grey background. Below the logo is a navigation menu with the following items: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS. The 'REFERRALS' item is highlighted with a white underline. Below the navigation menu is a dark blue header bar with the text 'REFERRAL: ADD TO CQ' in white. The main content area is white and contains the following fields and controls:

- Send to Queues:** Individuals: Housing Queue
- Referred Program:** Community Queue
- Referred to Agency:** Community Queue
- Referring Agency:** Coordinated Entry
- Private:** A toggle switch that is currently turned off.
- Text Editor:** A large text area with a toolbar containing icons for Bold (B), Italic (I), Bulleted List (1=), and Numbered List (2=).
- Buttons:** Two buttons at the bottom: 'SEND REFERRAL' and 'CANCEL'.

Referring Clients to the Community Queue (continued)

After completing a referral to the Community Queue, the default screen will appear as so.

**Avery Apple**

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

Changes successfully saved.

**REFERRAL: ASSIGN**

Client	Avery Apple
Referred to	Community Queue - Individuals: Housing Queue
Referring Agency	Coordinated Entry
Referred Date	11/08/2021 8:00 PM
Days Pending	0 day(s)
Qualified	Yes
VI-SPDAT-V2 score	7
Last Activity	11/08/2021 <b>CHECK-IN</b>
Referred by Staff	Agency Assessor
Private	<input type="checkbox"/>

**SAVE CHANGES** **CANCEL**

**REMOVE FROM QUEUE**

Reason for Removal -- Select Reason --

Queue Removal Date 11/08/2021

**SAVE CHANGES** **CANCEL**

**NOTES**

No records to display...

**B** **I** **☰** **☰**

**SEND NOTE**



STOP. Please read the following.

At this time:

- a client has been created,
- enrolled in a program,
- had a VI assessment conducted,
- and been referred to the Community Queue.

At this time, there is nothing else that needs to be done by the Assessor. Clients referred to the Community Queue will be discussed at subsequent By-Name List meetings, where community members case conference clients enrolled in Coordinated Entry and referred to the Community Queue.

Moving forward, however, Assessors or case managers may need to provide updates on a client, either through the 'Notes' section in the Community Queue or by completing the Current Living Situation assessment in the Coordinated Entry program.

Providing notes and updates on clients will *keep them enrolled* in the CE process.

Providing Current Living Situation assessments will contribute to the Coordinated Entry APR.

Please see sections 7 and 8 to learn how to add notes and complete assessments.

Otherwise, clients who are exited from Coordinated Entry or have no activity inside HMIS for 90 days will be auto-exited from the Community Queue.

## 7. Adding Client Notes to the Community Queue

In order to add notes to a client record, return to the client's profile page. Under the 'History' tab, a referral to the Community Queue will be visible after making a referral. Hovering over the entry will allow you to return to the client's Community Queue default page. Scroll to the bottom to complete any relevant client case notes.

The screenshot shows the 'History' tab for the client 'Avery Apple'. The navigation bar includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', 'LOCATION', and 'REFERRALS'. The 'HISTORY' tab is active. Below the navigation bar, there is a section for 'Advanced Search Options' with a 'View' dropdown. A table displays the history entries:

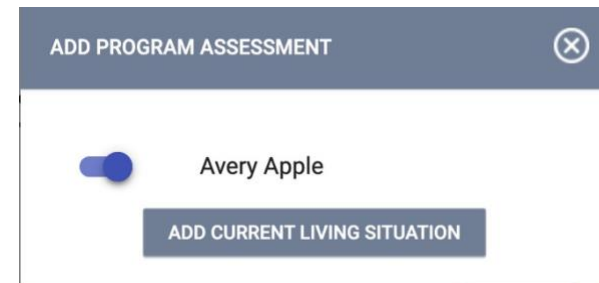
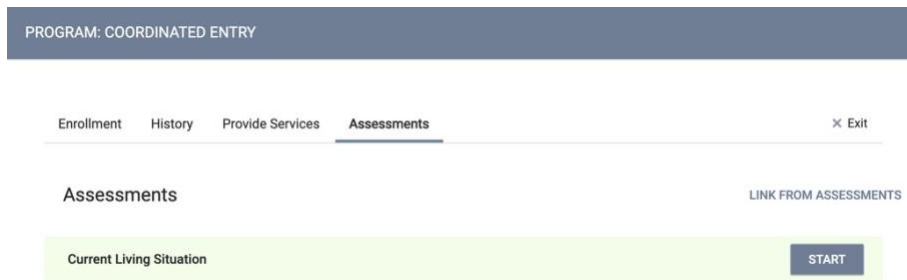
Service Name	Start Date	End Date	
<b>Referral: Individuals: Housing Queue</b> Coordinated Entry referral to Community Queue	11/08/2021	<b>Pending</b>	
<b>Single Adults V1</b> Coordinated Entry		11/08/2021	
<b>Coordinated Entry</b> Coordinated Entry	11/08/2021	<b>Active</b>	

At the bottom, there are color-coded filters: Program (light green), Service (light blue), Referral (light red), Reservation (light purple), and Assessment (light orange).

The screenshot shows the 'Notes' tab for the client 'Avery Apple'. The navigation bar includes 'PROFILE', 'HISTORY', 'SERVICES', 'PROGRAMS', 'ASSESSMENTS', 'NOTES', 'FILES', 'CONTACT', 'LOCATION', and 'REFERRALS'. The 'NOTES' tab is active. Below the navigation bar, there is a section for 'NOTES' with the text 'No records to display...'. A text area for writing notes is visible, containing formatting options: **B** (Bold), *I* (Italic), (Text Color), and (Background Color). A 'SEND NOTE' button is located at the bottom right of the text area.

## 8. Completing the Current Living Situation Assessment

For compliance with the Coordinated Entry APR, a Current Living Situation (CLS) assessment should be completed any time a client has a relevant engagement. The CLS assessment must be conducted inside the Coordinated Entry program, under the client's program enrollment.



The CLS assessment is a simple form; it only asks for the client's current living situation, with selections that are the same as the prior living situation. 'Living Situation Verified By' will always be TN-501 Memphis, our CoC code.

This screenshot shows the 'Add Current living situation for client Avery Apple' form. The form is titled 'PROGRAM: COORDINATED ENTRY' and has a navigation bar with 'Enrollment', 'History', 'Provide Services', and 'Assessments'. The form fields are:

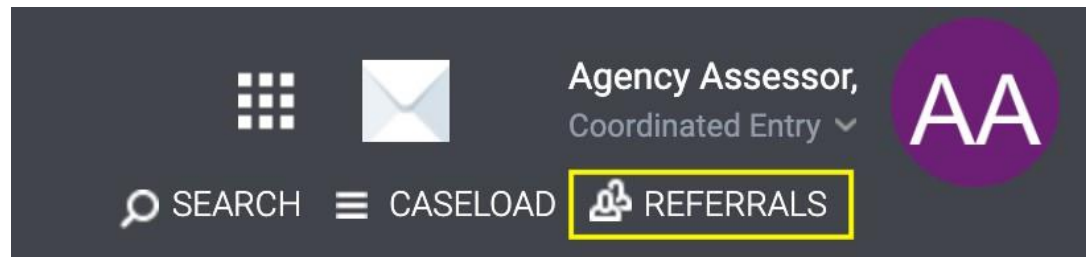
- Date of Contact: 11/08/2021
- Current Living Situation: Select
- Living Situation Verified By: Select
- Location Details: Select (with a dropdown menu showing 'TN-501 (Memphis/Shelby County CoC)')

At the bottom of the form, there are two buttons: 'SAVE & CLOSE' and 'CANCEL'.

## Appendix A

### Accessing the Community Queue

In order to access the Community Queue, navigate to Clarity's main search page, the page first presented after logging in. On the top right, 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.

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' (which is selected), and 'Individuals: Shelter Queue'. A search bar is present, along with a 'Mode' dropdown set to 'Standard' and a 'Sort By' dropdown set to 'Default'. There is also a toggle for 'Eligible Clients Only' and a 'SEARCH' button. The main content is a table with the following data:

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	📄	🕒
<b>Avery Apple</b> Referred by: Coordinated Entry ⓘ	11/08/2021	0	📄	🕒