

Coordinated Entry HMIS Reference Guide For Assessors



Community Alliance
for the Homeless

Last Revised: 10/26/23

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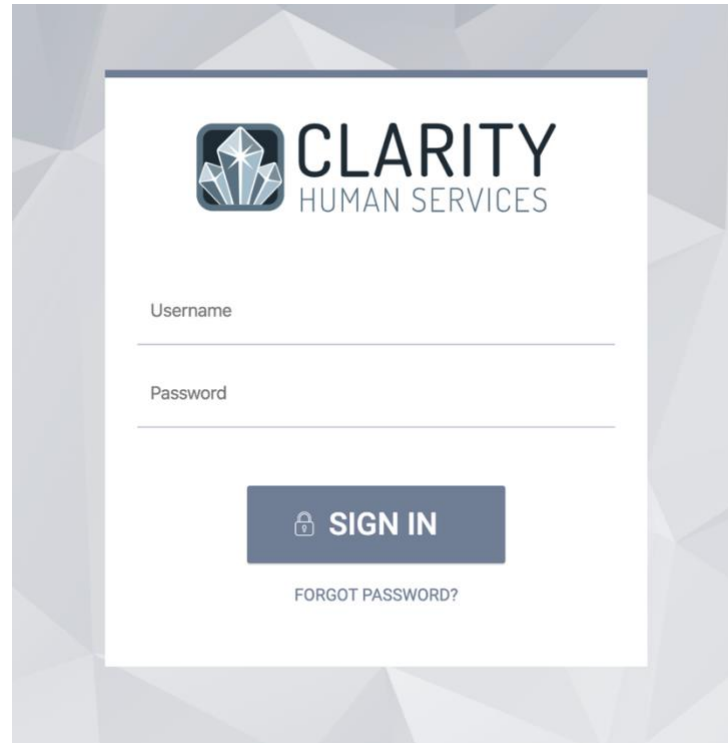
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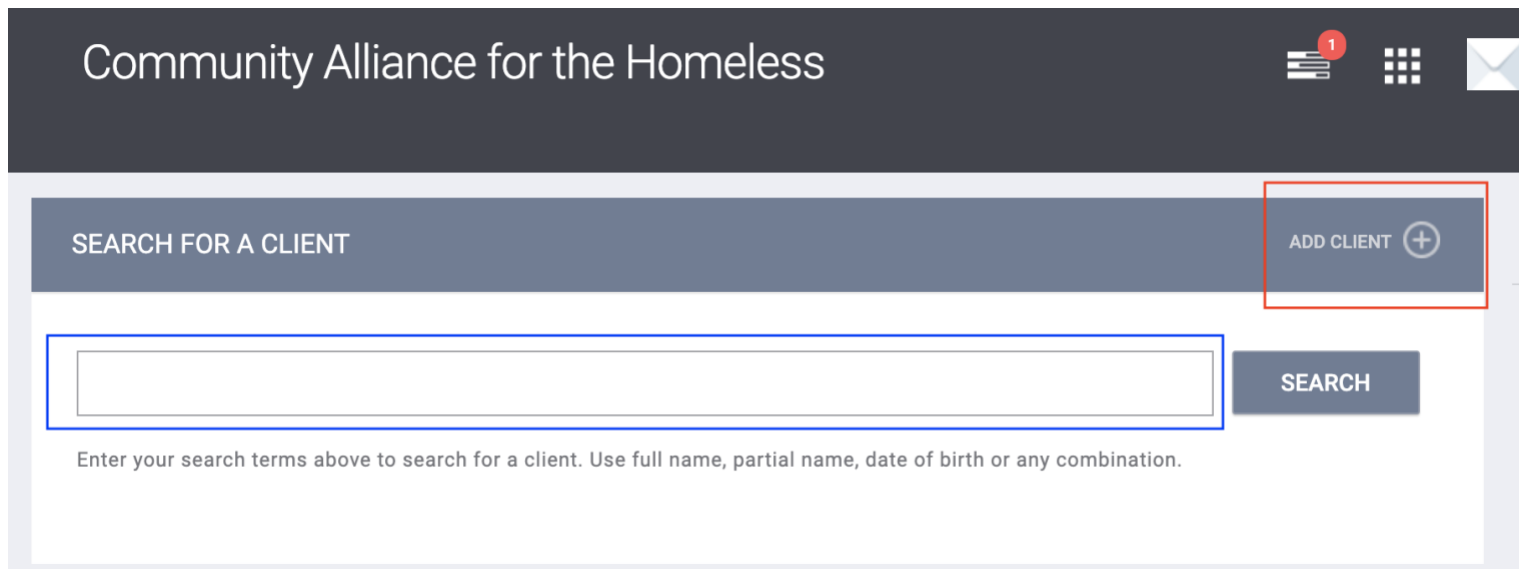
1. Log-in

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.



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="button" value="v"/>
Last Name	_____
First Name	_____
Quality of Name	Select <input type="button" value="v"/>
Quality of DOB	Select <input type="button" value="v"/>
Date of Birth	__/__/____
Middle Name	_____ None <input type="button" value="v"/>
Gender	Select <input type="button" value="v"/>
Race	Select <input type="button" value="v"/>
Ethnicity	Select <input type="button" value="v"/>

Please fill in Release of Information form

RELEASE OF INFORMATION

Permission	Yes <input type="button" value="v"/>
Start Date	11/08/2021 <input type="button" value="calendar"/>
End Date	11/08/2024 <input type="button" value="calendar"/>
Documentation	Select <input type="button" value="v"/>

CONSENT REFUSED

Consent Refused

Create a Client (continued)

Below is an example of Avery Apple.

Avery Apple

PROFILE HISTORY SERVICES PROGRAMS ASSESSMENTS NOTES FILES CONTACT LOCATION REFERRALS

Agency Assessor, Coordinated Entry

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 Adult. Age: 39
Middle Name	None
Gender	Male
Race	White
Ethnicity	Non-Hispanic/Non-Latin(a)(o)(x)
Veteran Status	No

UNIQUE IDENTIFIER
051B3AC79

Household Members

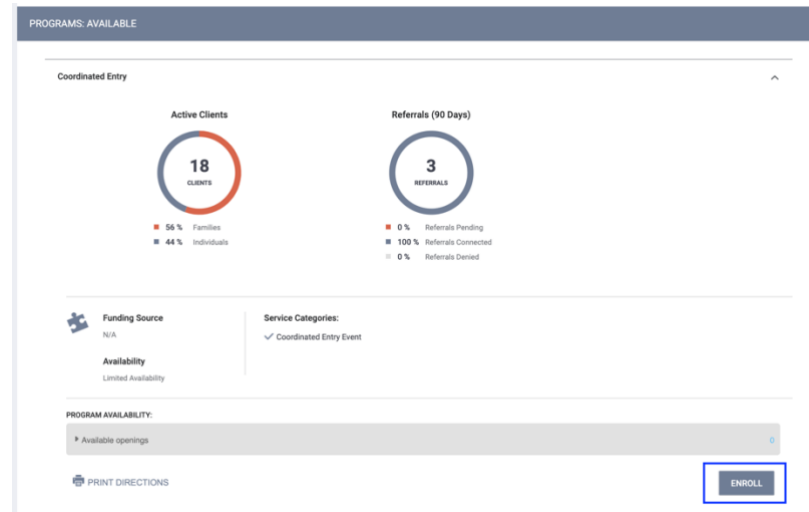
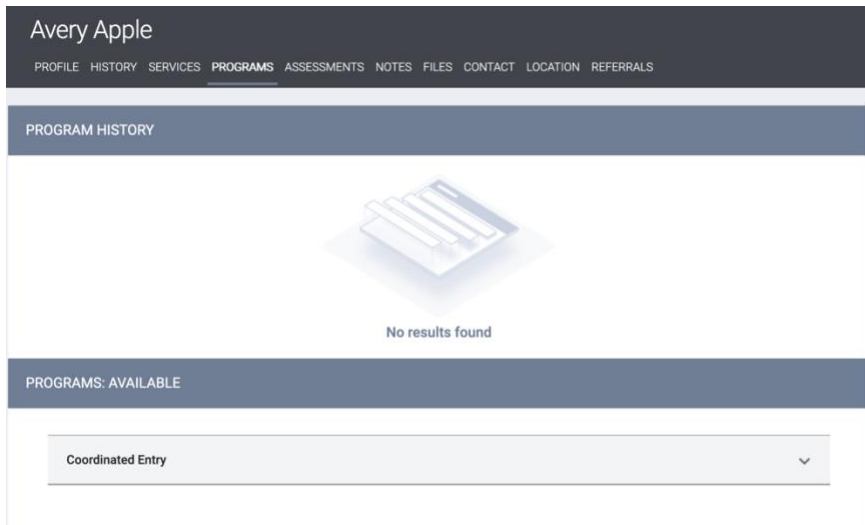
No active members [Manage](#)

Care Team

No active members [Manage](#)

3. Enroll a Client into Coordinated Entry


To enroll a client into Coordinated Entry, 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 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

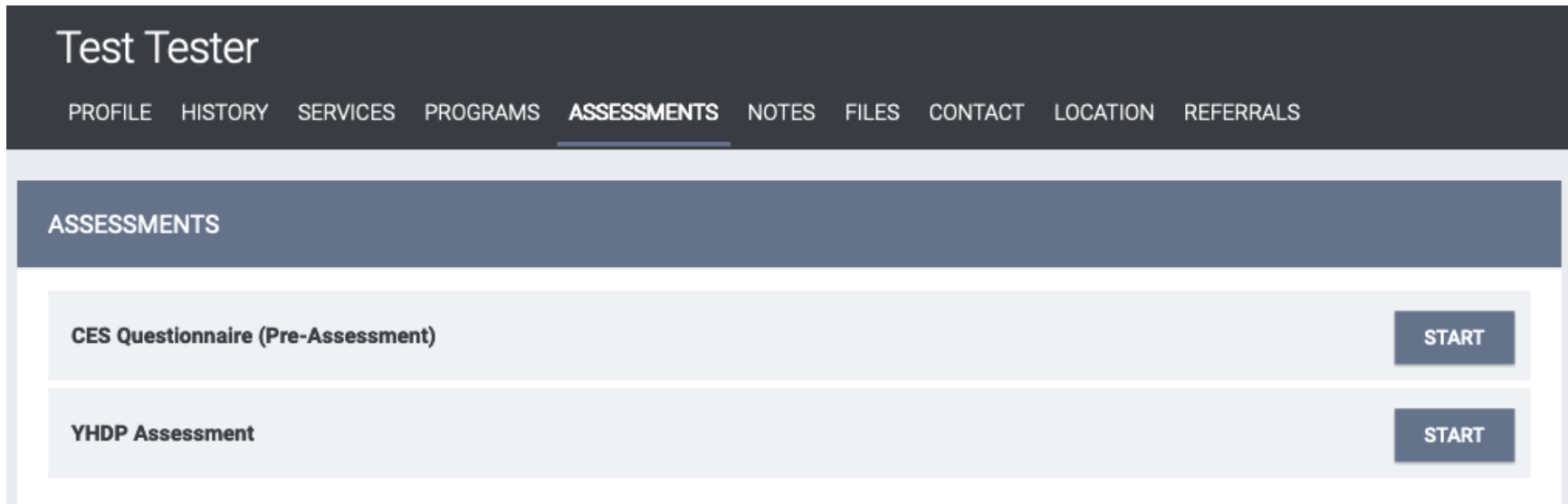
Program Group Members

No active members

4. Conduct a Phase 1 Assessment

After the client is enrolled in Coordinated Entry, an initial assessment, either the CES Questionnaire or the YHDP Assessment, must be completed. Use the YHDP Assessment for any clients ages 18-24, including pregnant and parenting youth; use the CES Questionnaire for all other clients. You can navigate to the assessment by clicking the “Assessments” tab in the top menu.

Once there, click “START” on the appropriate assessment.



On the next page, complete the assessment along with the client.

This is the end of Assessment Phase 1. At this point, the client is successfully enrolled in Coordinated Entry. The rest of this reference guide outlines Assessment Phase 2.

5. Conducting a Phase 2 Assessment



Once a client has been determined eligible, a more in-depth assessment, such as the VI-SPDAT, must be conducted *inside* the program enrollment in order to be captured correctly for the Coordinated Entry APR. 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'.

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

Conducting a Phase 2 Assessment (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, there is a dark header with the logo and a navigation menu: PROFILE, HISTORY, SERVICES, PROGRAMS (highlighted), ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, REFERRALS. Below the header, a blue bar displays 'PROGRAM: COORDINATED ENTRY'. A secondary navigation bar contains 'Enrollment', 'History' (highlighted), 'Provide Services', 'Assessments', and '× 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, there is a legend with three categories: 'Reservation' (represented by a light green square), 'Service' (represented by a light blue square), and 'Referral' (represented by a light purple square).

Conducting a Phase 2 Assessment (continued)

Below, you can see all the assessments possible for a client to have completed. For this training deck's purpose, click simply on 'Single Adults VI.'

PROGRAM: COORDINATED ENTRY

Enrollment History Provide Services **Assessments** × Exit

Assessments LINK FROM ASSESSMENTS

Current Living Situation	START
Status Update Assessment	START
Annual Assessment	START
Youth VI	START
Families VI	START
Single Adults VI	START


Conducting a Phase 2 Assessment (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 ▼

1. Referring Clients to the Community Queue

Upon completion of the Single Adults VI, 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 shows a web interface for 'PROGRAM: COORDINATED ENTRY'. At the top, there are navigation tabs: 'Enrollment', 'History', 'Provide Services', 'Assessments' (which is active), and 'Exit'. Below this is a section titled 'PROGRAM ELIGIBILITY DETERMINATION'. Inside this section is a box titled 'VI-SPDAT-V2 Score Summary' containing a table of scores. Below the table are two toggle switches: 'Individuals: Housing Queue' (which is turned on) and 'Individuals: Shelter Queue' (which is turned off). At the bottom of the screen is a button labeled 'REFER DIRECTLY TO COMMUNITY QUEUE(S)'.

VI-SPDAT-V2 Score Summary			
GENERAL	0		
HISTORY OF HOUSING & HOMELESSNESS	1	RISKS	1
SOCIALIZATION & DAILY FUNCTION	2	WELLNESS	3
VI-SPDAT-V2 PRE-SCREEN TOTAL 7			

Individuals: Housing Queue

Individuals: Shelter Queue

REFER DIRECTLY TO COMMUNITY QUEUE(S)

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 a web application interface for 'Avery Apple'. At the top, there is a dark navigation bar with the name 'Avery Apple' and a menu of options: PROFILE, HISTORY, SERVICES, PROGRAMS, ASSESSMENTS, NOTES, FILES, CONTACT, LOCATION, and REFERRALS (which is highlighted). Below this is a header for the current page: 'REFERRAL: ADD TO CQ'. The main content area contains several fields and a toggle:

- 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.

Below these fields is a text input area with a rich text editor toolbar containing buttons for Bold (B), Italic (I), Bulleted List (1=), and Numbered List (2=). At the bottom of the form are two buttons: '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 CHECK-IN
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.

6. 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.

HISTORY



Advanced Search Options [View](#) 

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

Program Service Referral Reservation Assessment

NOTES

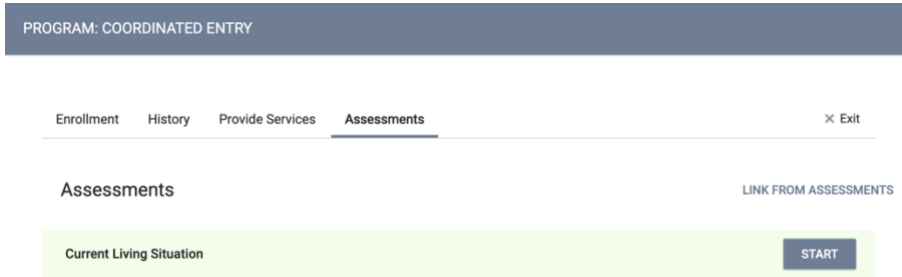
No records to display..

B *I*  

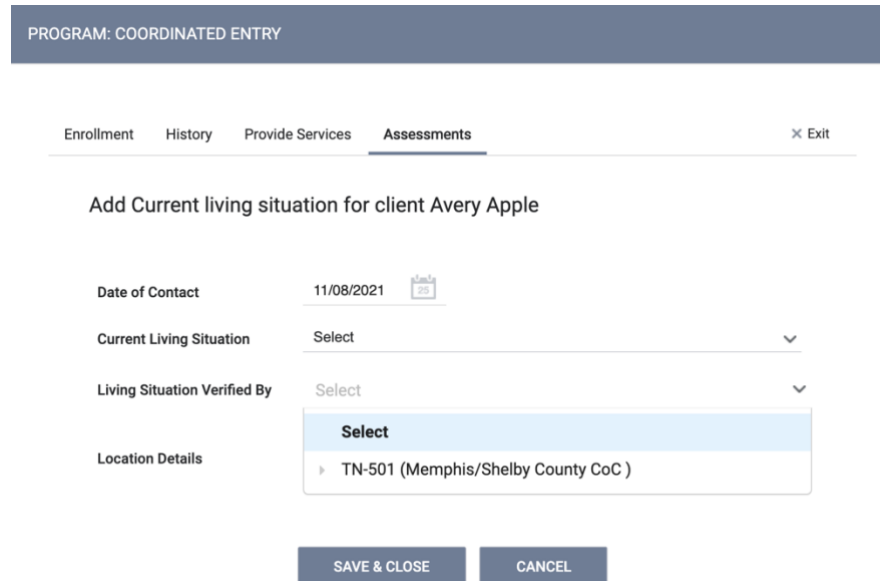
SEND NOTE

7. 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.









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.

after

Agency Assessor,
Coordinated Entry

SEARCH CASELOAD REFERRALS



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 shows a web interface for managing referrals. At the top, there's a header 'REFERRALS' and a navigation bar with tabs: Pending, Community Queue (selected), Completed, Denied, Sent, and Availability. Below this, the 'Community Queue' section is active, with sub-tabs: Families: Housing Queue, Families: Shelter Queue, Individuals: Housing Queue (selected), and Individuals: Shelter Queue. There are search filters for 'Search', 'Mode' (Standard), and 'Sort By' (Default). A toggle for 'Eligible Clients Only' is present. A 'SEARCH' button is on the right. The main content is a table with columns: Client, Referral Date, Days Pending, and two action icons (print and refresh). The table lists six clients, with 'Avery Apple' highlighted by 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		