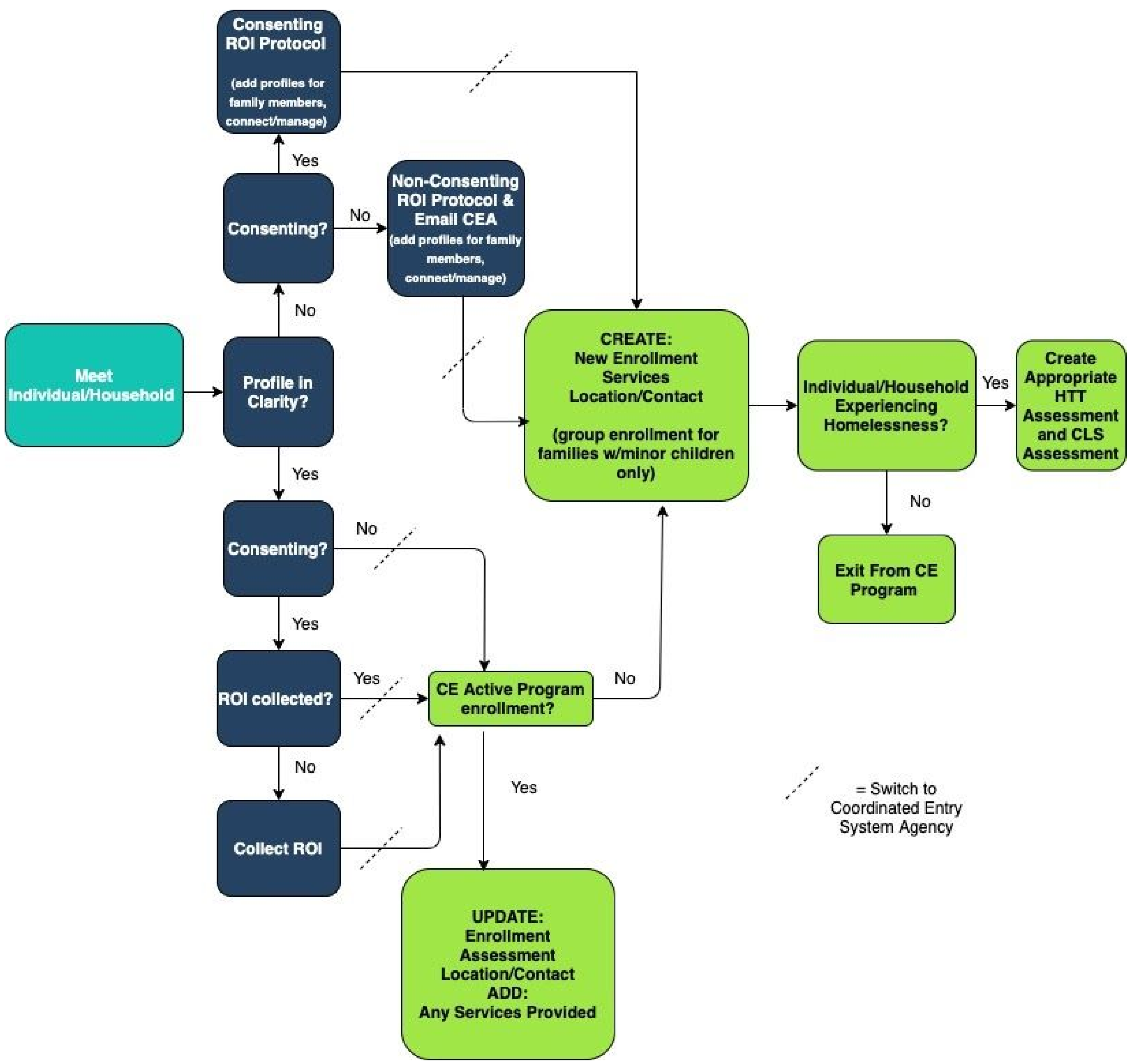
CEA New Assessor Workflow April 1, 2020

HUD released new Data Standards for Coordinated Entry which include: Program Enrollment Requirement, Services and Current Living Situation Assessments. To meet this requirement in our community, below is the workflow for assessors to follow when assessing individuals/households for resources in Clarity - HMIS effective April 1, 2020.



CEA New Assessor Workflow FAQ

1. What was transferred over from previous enrollments to the "new" system?
Data fields from the existing client-level Housing Triage Tool (HTT) and/or data from existing enrollment screens in other programs such as shelters or street outreach were "mapped" to complete the matching fields on the Coordinated Entry System Program enrollment screen and the updated program-level Housing Triage Tool.

2. How do we "migrate" their HTT to the enrollment? Do we need to do a new assessment?
Once you have the new CE enrollment complete, go to the program-level assessments tab and "start" a new HTT… you'll either review auto-filled data and confirm or you would enter the data from scratch. The system will detect if you need to enter this again.

3. Does CE apply to domestic violence survivors?
Yes. VAWA specific agencies have been contacted since they don't enter into the system-wide CE program but they do enter into their own CE program. Other agencies working with clients actively fleeing and/or survivors: if de-identified then notify CEA (cea@kingcounty.gov) following the protocol to notify CEA staff of identifying information and contact information.

4. How are agencies "doing" with the April 1st changes?
We are seeing Assessors adapt to the new workflow and monitoring progress closely. We are developing an Assessor Management/CE Data Quality Dashboard that HMIS Agency Leads and T3 Trainers can use to help support the new workflow and the HMIS System Admin Team will continue to follow up and provide additional supports as well.

5. If we have users with specific questions, even after they've viewed the webinar, where can we refer them with their questions and concerns with the new workflow?
They can always reach out to our King County HMIS Help Desk for support: kcsupport@bitfocus.com. If the Help Desk cannot answer the question they will escalate to the KC HMIS System Admin team.

6. Can you explain more about the data that was migrated?
Active clients around the April 1st date had their information copied to the CE System Program enrollment and assessment screens to avoid creating this manually. Assessors for these clients are responsible for verifying this information if the client comes to their agency for services. They should double check the enrollment information, contact and location information, complete a new CLS assessment, and update the HTT assessment. In addition, change the staff to themselves from Admin Admin. Of course with any project, there may have been clients that got missed. If that is the case, you will need to create a program enrollment for them.

7. What are some tips about the new CE Workflow we should know or bring back to our teams?
The most common problem we are seeing is people struggling to get to the proper assessment tab. Be sure to be logged into the Coordinated Entry System Agency before trying to complete data entry. The most common errors that we are seeing are staff forgetting to complete a CLS assessment and adding contact/location information. View the recorded webinar on the King County website under training for a through review.

8. How do you make referrals?
HUD guidelines for Coordinated Entry includes providing services (called: CE Events) which are referrals to other services such as mental health, legal assistance, employment, etc. Enter this under the Service section indicating that you have provided a referral. Enter the date the service was provided (the end date is the same as the service start date) and enter a note. Save.

9. Where is the HTT is located? Staff are having a hard time finding it.
The HTT is located under the CE System Agency, under the CE System Program - Assessments.

10. I don't know if this is coming up, but I have noticed a few clients have not been auto-enrolled in the new coordinated entry "program" Do you want us to manually enter them?
Yes please. They most likely were either housed or inactive at the time the data was pulled.

11. For questions related to CEA policies around when and what data to enter, where should those questions be directed?
Staff should review the CEA Assessor manual and the CEA Operation manuals first, and then can direct questions to jennell.hicks@kingcounty.gov. New versions with updated screenshots are being updated and will be posted soon.

12. With the new HUD Guidelines, do all the staff have to do a new training?
All existing assessors should have already completed the two hour webinar offered in April and May. For those that didn't get a chance to, or became assessors during that timeline, the new material will be covered in the existing refresher trainings offered each month.

13. I remain confused as to when to do a new assessment. We do a new assessment if they need to be migrated to the new system. Do we now do a new assessment if the assessment is one year old even if there are no significant changes in their status or events?
New Assessments are only needed if no open/active CE enrollment: As a general rule, you should start a new CE System Enrollment and start a new assessment within that enrollment if they do not currently have an open/active CE System Program Enrollment and you have had contact with the client and know the client to still be experiencing homelessness...no matter how old their READ ONLY HTT is. If the assessment is over 365 days old, the system will automatically have you start a new enrollment. If less than that date, the information will populate on the form. You will verify it is complete, and save.

14. How do I enter Households into the CE System Agency?

Single adults without minor children will have their own enrollments and not be enrolled with any other adults as a group. Only families with minor children at the time of assessment will be entered as a group. The assessment, current living situation and services will be entered on the Head of Household only. Households of all compositions should be managed at the global profile level. For information on managing households(i.e. Adding new members, removing members, viewing household member history, assigning member type, assigning head of household) see this Helpdesk article.