

Marin- Assessor Training

Completing an Enrollment

To enroll a client or household in a program, click the *Programs* tab in the client record. The tab contains two sections: *Program History* and *Programs: Available*.(figure 1)

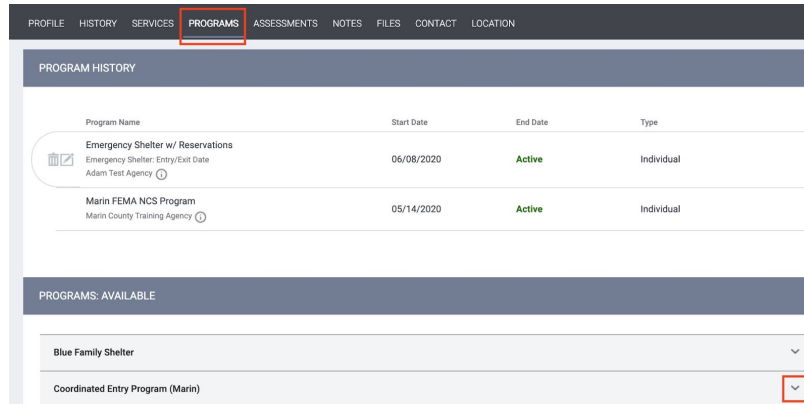


figure 1

Click Enroll (figure 2). Please note: Data quality and completeness is important. Please try to avoid using “Data Not Collected,” “Client Doesn’t Know” or “Client Refused” when possible.

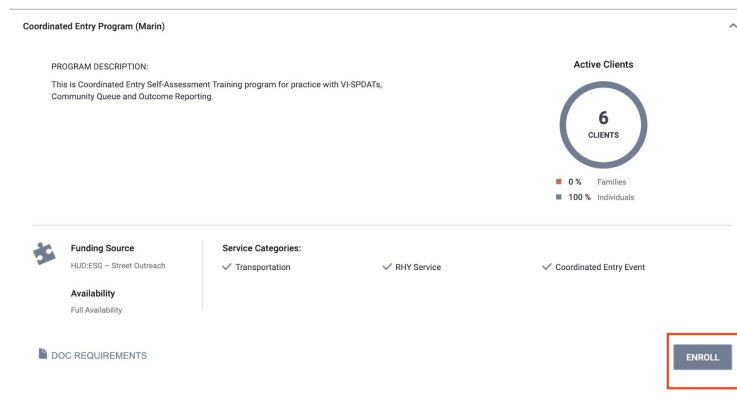


figure 2

Full instructions on how to complete a program enrollment can be found [here](#).

Current Living Situation

The purpose of the Living Situation Assessment is to regularly document the current living situation of people experiencing homelessness and to document homeless chronicity.

Marin- Assessor Training

For Coordinated Entry, record a CLS anytime any of the following occurs:

1. Project start (enrollment into CE)
2. A CE Assessment or CE Event is recorded; or
3. The client's living situation changes

Click the program level Assessment tab. Click *Start* next to the Current Living Situation Assessment. (figure 3) Click Add Current Living Situation. (figure 4)

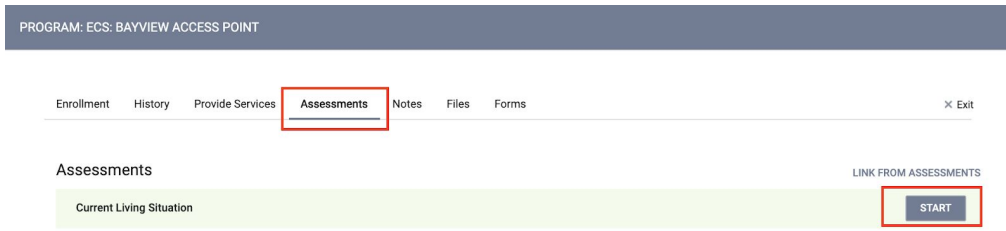


figure 3

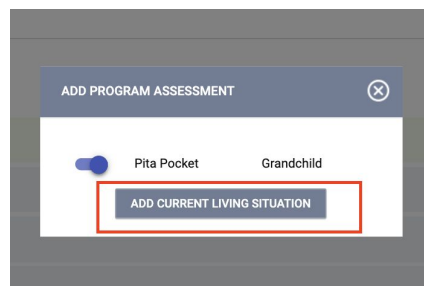


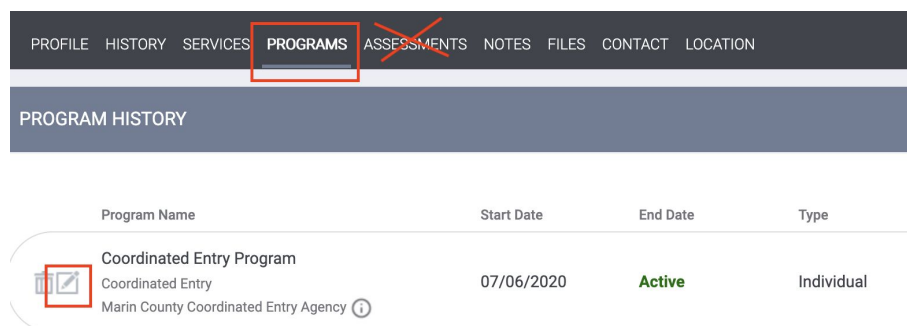
figure 4

Full instructions on how to complete a Current Living Situation Assessment can be found [here](#).

Coordinated Entry Assessment

Prior to completing an assessment, you should check the client's history tab or profile screen to see if they have already completed an assessment.

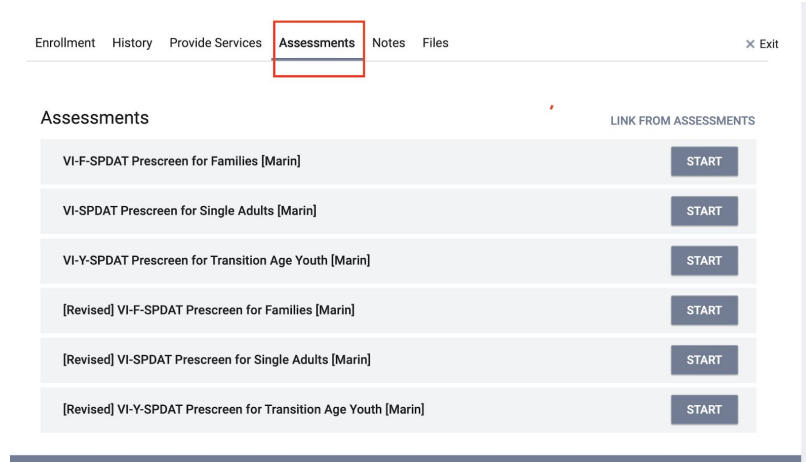
Open the Coordinated Entry enrollment, click the *Assessment tab*. (figure 5)



Marin- Assessor Training

figure 5

Click *Start* for the applicable assessment. (figure 6)

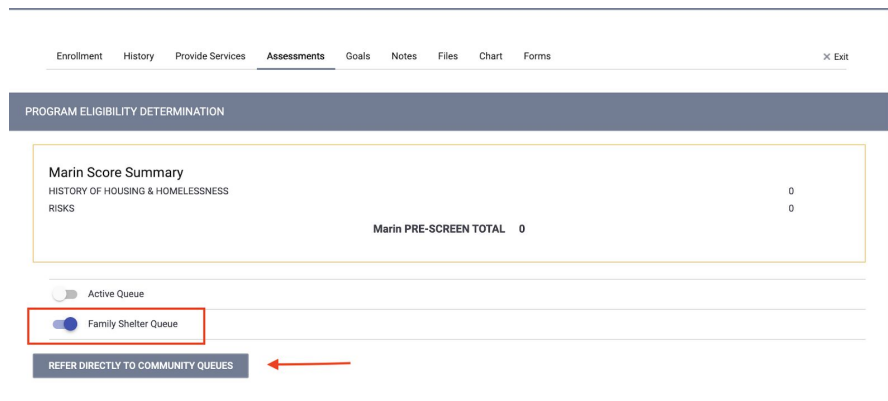


Assessments	LINK FROM ASSESSMENTS
VI-F-SPDAT Prescreen for Families [Marin]	START
VI-SPDAT Prescreen for Single Adults [Marin]	START
VI-Y-SPDAT Prescreen for Transition Age Youth [Marin]	START
[Revised] VI-F-SPDAT Prescreen for Families [Marin]	START
[Revised] VI-SPDAT Prescreen for Single Adults [Marin]	START
[Revised] VI-Y-SPDAT Prescreen for Transition Age Youth [Marin]	START

figure 6

Referral to the Community Queue

Family Shelter ONLY: Families in need of shelter should be referred to the Family Housing Queue at the time they complete an assessment. For other types of housing and for other populations, Clients will be referred to the Active List during case conferencing



PROGRAM ELIGIBILITY DETERMINATION	
Marin Score Summary	
HISTORY OF HOUSING & HOMELESSNESS	0
RISKS	0
Marin PRE-SCREEN TOTAL 0	

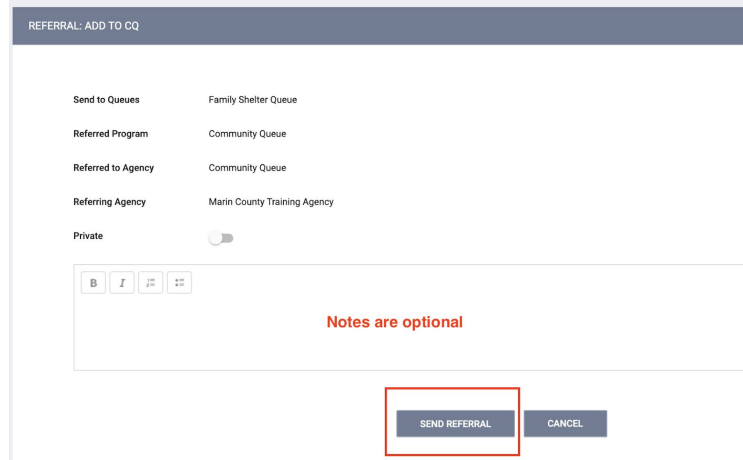
Active Queue

Family Shelter Queue

REFER DIRECTLY TO COMMUNITY QUEUES

figure 7

Marin- Assessor Training



REFERRAL: ADD TO CQ

Send to Queues: Family Shelter Queue

Referred Program: Community Queue

Referred to Agency: Community Queue

Referring Agency: Marin County Training Agency

Private:

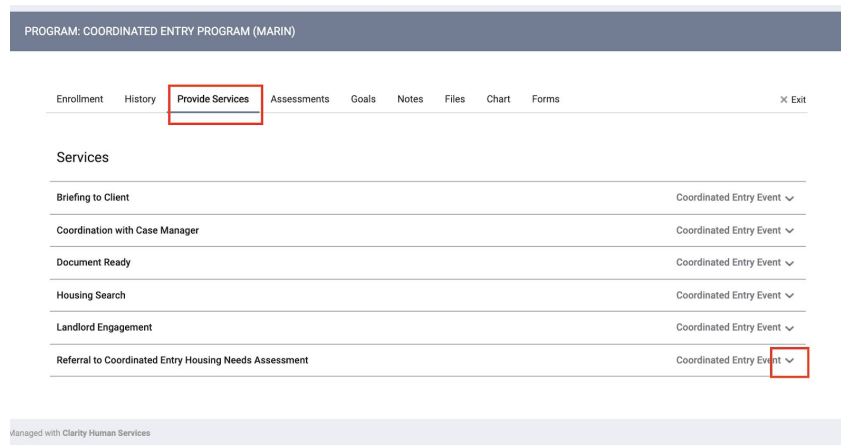
Notes are optional

SEND REFERRAL CANCEL

figure 8

Coordinated Entry Event Services

A “Referral to Housing Needs Assessment” service should be recorded every time you enter a Coordinated Entry assessment. (figure 7)



PROGRAM: COORDINATED ENTRY PROGRAM (MARIN)

Enrollment History **Provide Services** Assessments Goals Notes Files Chart Forms X Exit

Services

Briefing to Client	Coordinated Entry Event
Coordination with Case Manager	Coordinated Entry Event
Document Ready	Coordinated Entry Event
Housing Search	Coordinated Entry Event
Landlord Engagement	Coordinated Entry Event
Referral to Coordinated Entry Housing Needs Assessment	Coordinated Entry Event

Managed with Clarity Human Services

figure 9

Full instructions on how to complete services can be found [here](#).