Coordinated Entry: Assessor Training

Marin County

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Agenda

Part 1: Refresher

- Switching Agencies
- Client Profiles
  - Searching for a client
  - What to do if you see duplicate profiles
  - Creating a client profile
  - ROI
  - Managing households
  - Contact and Location Information
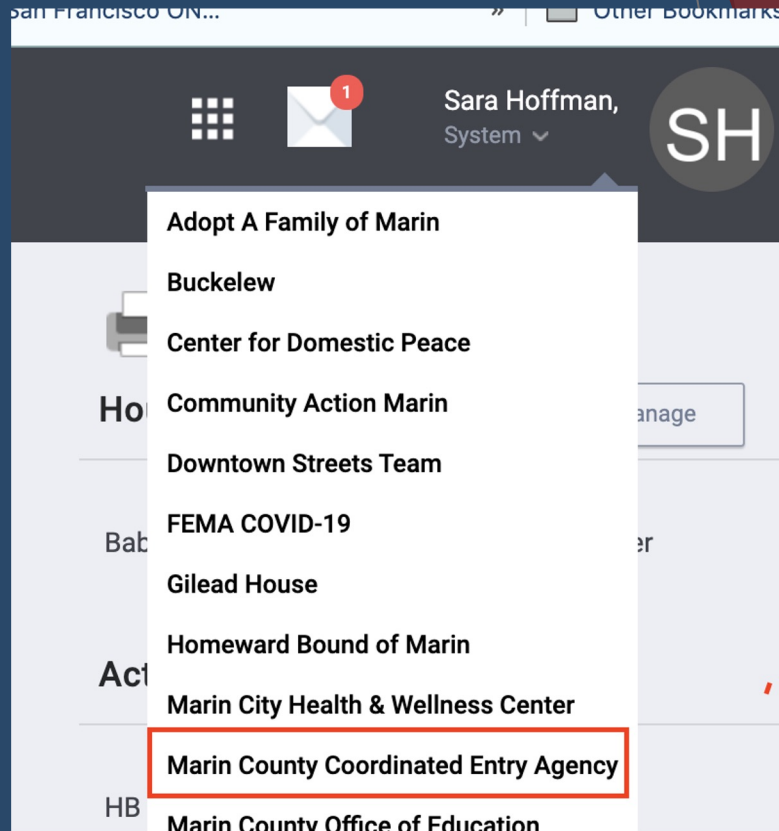
Part 2: New Items

- CE Enrollment
- Current Living Situation
- CE Assessment
- Referral to the CQ
- CE Events and Services
- Uploading Documentation
- Exit
- Reports
- Resources

Part 1- Refresher

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Switching Agencies

- Work related to Coordinated Entry should be done under the Marin County Coordinated Entry Agency

- Users will need to switch agencies in Clarity

Client Profiles

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Looking up clients Clarity

- Search for client or head of household
    - Search by name **partial name**, DOB or SSN
- If unable to find head of household, create a new profile

SEARCH FOR A CLIENT   ADD CLIENT ⊕

Search by name, partial name, DOB or SSN   SEARCH

Enter your search terms above to search for a client. Use full name, partial name, date of birth or any combination.

anaged with **Clarity Human Services**   🗑 Recover deleted data

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Duplicate Profiles

- If you discover multiple profiles for a client, you should:
  - Identify which profile should be the primary
  - Contact the Bitfocus Help Desk to get the records merged together
    - Provide the unique identifiers for each profile

Creating New Profiles

- Please be sure to collect as much information as possible
  - Avoid using "Client refused" or Data Not Collected" whenever possible
- For existing profiles, confirm that all information is correct

Release of Information (ROI)

- A release of information should be added for every client
- You can upload a signed PDF or complete by E-signing

Household M...

Baby Sara Test

Active Progra...

Client Privacy

ADD RELEASE OF INFORMATION ⊕

RELEASE OF INFORMATION

Permission	Yes ⌄
Start Date	07/09/2020 📅
End Date	07/09/2023 📅
Documentation	Select ✓ Electronic Signature Attached PDF Signed Paper Document Verbal Consent

SAVE CHANGES   CANCEL

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Release of Information (ROI)

E-Signature

Release of Information (ROI)

- If the client does not consent, you should set the ROI permission to No and mark the record *"Private"*.
- We always want to encourage the client to consent when possible. This increase coordination of care.

Managing Households

- If the client is part of a family but is moving forward individually, you will need to remove the client from the household

Update the Location Tab

- Location can be added manually or by using the GPS icon
- The active toggle should be turned on to indicate the client's current location

Update Contact Information

- More than one contact can be added per client

Part II- New CE Workflow

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CE Enrollment

Coordinated Entry Enrollment

- All clients who are eligible for CE should be enrolled into a CE program
  - HUD requirement
- Enrollments are completed to show that clients are actively being engaged in CE
- Eliminates duplication of staff efforts and burden on the client
  - Information cascades forward to other fields/screens in ONE

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Coordinated Entry Enrollment

Coordinated Entry Enrollment

Current Living Situation

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Current Living Situation (CLS)

- ***NEW*** Required as part of the 2020 HUD Data Standards
- Used to regularly document the following:
  - The current living situation of people experiencing homelessness
  - Homeless chronicity
- When entered by shelter staff or outreach staff, it can be used as a homeless verification.

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Current Living Situation

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

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

Current Living Situation Assessment

Current Living Situation Assessment

Add Current Living Situation for client Pita Pocket

Additional questions may populate based on the client's responses

Date of Contact	10/14/2019
Current Living Situation	Hospital or other residential non-psychiatric medical facility
Living Situation Verified By	ECS: Bayview Access Point
Is client going to have to leave their current living situation within 14 days?	Yes
Has a subsequent residence been identified?	Select
Does individual or family have resources or support networks to obtain other permanent housing?	Select
Has the client had a lease or ownership interest in a permanent housing unit in the last 60 days?	Select
Has the client moved 2 or more times in the last 60 days?	Select
Location Details	

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CE Assessment

CE Assessment

- Evaluates a client's possible health vulnerability, housing barriers, and homelessness chronicity
- Determines prioritization for housing resources
- Does NOT guarantee eligibility for a housing resource

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CE Assessment

- Prior to completing an assessment, **check the client's History or profile screen** to see if they have already completed an assessment
- If the client has been exited from CE, you need to re-enroll them prior to completing the assessment

CE Assessment

*The assessment has not changed, it is just located in a new place

CE Assessment

- ***NEW*** There are two new HUD 2020 Data Standards fields that will be on the CE Assessment
    - Location- *this was updated to match the HUD standards*
    - Assessment Type

CE Assessment

ADULT PRIMARY CE ASSESSMENT

Assessment Date   08/28/2019

Complete the fields of the assessment being as thorough as possible (try to avoid using data not collected)

ADULT HOUSING ASSESSMENT

1) Where did you stay last night? (Living situation, not geography)   Select

2) In the place you are staying, are you experiencing physical or sexual violence?   Select

THE REMAINING FIELDS ARE USED FOR STATISTICAL PURPOSES (NO INPUT NECESSARY)

3) How long have you been homeless this time?   Select

4) Have you resided in a shelter, safe haven, or place not meant for human habitation for more than 12 months over the last 3 years (Does not need to be consecutive)?   Select

5) How long in total have you lived in an emergency shelter or place not meant for people to sleep, including today? (Over lifetime)   Select

6) How many times in the past three years have you lived in a shelter, outdoors, in a vehicle, or other place not meant for people to live? (each break in homelessness has to span at least 7 consecutive nights)   Select

7) How old were you when you first experienced homelessness (living in shelter, outdoors, in a vehicle or other place not mean for people to live)?   Select

8) Do you have one of the following disabling conditions, or been told you have one of the following by a healthcare provider: Physical disability, developmental disability, chronic health condition, HIV/AIDS, mental health problem, substance abuse?   Select

9) Do you have any challenges that cause you to need help with daily activities or help with maintaining housing (e.g. a serious medical condition, mental health problem, substance problem, other issue)?   Select

10) How many times have you used crisis services in the past year (for example, mental health crisis services, hospital, detox, suicide prevention hotline)?   Select

SAVE   CANCEL

Referral to the Community Queue

Family Shelter ONLY

- Families in need of shelter will be referred to the Family Housing Queue at the time of assessment

Permanent Housing/RRH

- Clients will be referred to the Active List during case conferencing

Referral to the Community Queue

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

Referral to the Community Queue

Clients may removed from the queue if they self- resolve, pass away or referred by mistake

CE Events and Services

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CE Event Services

- ***NEW*** Required as part of the 2020 HUD Data Standards
- Services set up under the CE agency/program are categorized as CE Events
- ***Remember*** Every time a CE event is recorded, you must enter a Current Living Situation

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CE Event Services

- "Referral to Housing Needs Assessment" service
  - Recorded every time you enter a CE Assessment

CE Event Services

- Select the appropriate referral source

Uploading Documents

Uploading Documents

Exits

Exits

- Assessor and Matchmaker staff are responsible for exiting clients from the CE program
- Client should be exited from CE for the following reason:
  - The client has entered a permanent residential project type or is otherwise known to have found permanent housing
    - A client is automatically exited from CE when a client has a move-in date recorded or destination for a permanent housing destination
  - The client is known to have left the CoC to pursue other assistance
  - The client is deceased
  - Client has declined all services

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Auto-Exits from CE when Housed

Auto-exits from CE happen when a client has a move-in date recorded or destination for a permanent housing destination

Example 1:

The client is referred to Fireside. The client is enrolled in the program with a move-in date of 7/30/20.

Auto-Exit from CE= YES

Example 2:

The client informs their case manager they are going to live with their aunt in Oregon.

The client needs to be manualled exited from CE.

Auto-Exit=NO

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Exits

Recap of CE Data Standards Elements

1. Enrollment
2. Current Living Situation
3. CE Assessment (VI-SPDAT)
4. Referral to queue (Family Shelter only)
5. CE Event Services

Enroll in Coordinated Entry	→	Current Living Situation	→	Coordinated Entry Assessment	→	Families Shelter ONLY Refer to the Community Queue	→	Coordinated Entry Events (services)
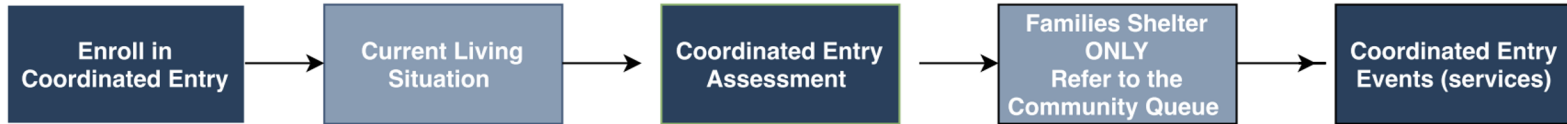
Remember...

A Current Living Situation must be recorded when you:

- Enroll the client
- Enter a VI-SPDAT
- Enter a Referral: Housing Needs Assessment Service

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Referral Statistics Report

- [RFRL-101] Referral Statistics (Community and Referral Reports)
    - Who's been referred
    - Inbound vs. outbound
    - Number of referrals received by an agency
    - Status of referrals

Referral Statistics Report

Referral Statistics

Sarah Smith Housing Services

Dates Between: 05/01/2018 and 12/27/2018
Referral Direction: Outbound

Number of Agency referrals received	3
Pending Referrals	
Number of pending referrals	1
Oldest pending referral in days	83
Newest pending referral in days	83
Average pending referral in days	83
Pending - In Process Referrals	
Number of pending referrals	0
Oldest pending referral in days	0
Newest pending referral in days	0
Average pending referral in days	0
Completed Referrals	
Number of referrals resulting in Program enrollment	1
Longest time to connect referral in days	53
Shortest time to connect referral in days	53
Average time to connect referral in days	53
Denied Referrals	
Number of denied referrals	1
Longest time to deny a referral in days	28
Shortest time to deny a referral in days	28
Average time to deny a referral in days	28
Breakdown Of Most Common Denied Referral Reasons	
Client refused services	1

Breakdown Of Referred Programs

NOTE: P - Pending; **P / I** - Pending - In process; **A** - Accepted; **D** - Denied.

PH - Permanent Supportive Housing (disability required)

Agency Name	Program Name	P	P / I	A	D
Sarah Smith Housing Services	Test PSH Program	1	0	0	0
Sarah Smith Housing Services	Youth Hope Housing	0	0	0	1

PH - Rapid Re-Housing

Agency Name	Program Name	P	P / I	A	D
Housing Test Agency	Rapid Rehousing	0	0	1	0

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Program Roster

- [GNRL-106] Program Roster (Program Based Report)
  - Who's stayed in the program
  - Lists program stay information for clients with the selected status in the selected program

Program Roster

Program Roster Report — **Sarah Smith Housing Services**
Active within [08/01/2018 - 12/27/2018]

Housing Move-in: Undefined = Unknown HoH or Move-in is Null, ☐ = Non PH Project

Client	Unique Identifier	Birth Date	Age At Entry	Current Age	Enroll Date	Exit Date	LOS	Housing Move-in	Assess-ments	Services	Assigned Staff
Program: Youth Hope Housing											
Test, Visibility	00948F75C	01/01/1998	20	20	12/18/2018	-	10	undefined	0	0	S. Dougherty

Total: 1

Program Name	Project Type	Project Applicability
Youth Hope Housing	PH - Permanent Supportive Housing (disability required)	Permanent Housing for Disabled Homeless Persons [SHP-PH]

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Reports

New and updated Coordinated Entry report coming soon!!!!

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Resources

Bitfocus Help Desk

marin@bitfocus.com or (415) 429-4211

Marin Help Center Web Page

https://marin.clarityhs.help/hc/en-us

Coordinated Entry Training Materials

https://marin.clarityhs.help/hc/en-us/articles/360052218714

The Help Desk Widget