Coordinated Entry: Family Shelter Training

Marin County

Agenda

**In today's training, you will learn how to**

- Complete the Family Shelter Screening
- Refer a family from the *Family Shelter Queue* to the family shelter program
- Process a referral by
  - Changing a referral from pending to pending in-process
  - Denying a referral
  - Accepting a referral by enrolling the client

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How to know who is on the Shelter Queue

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Families on the Shelter Queue Report

► The Families on the Shelter Queue report will help you identify new families on the queue

► The report can be accessed under the Data Analysis tab
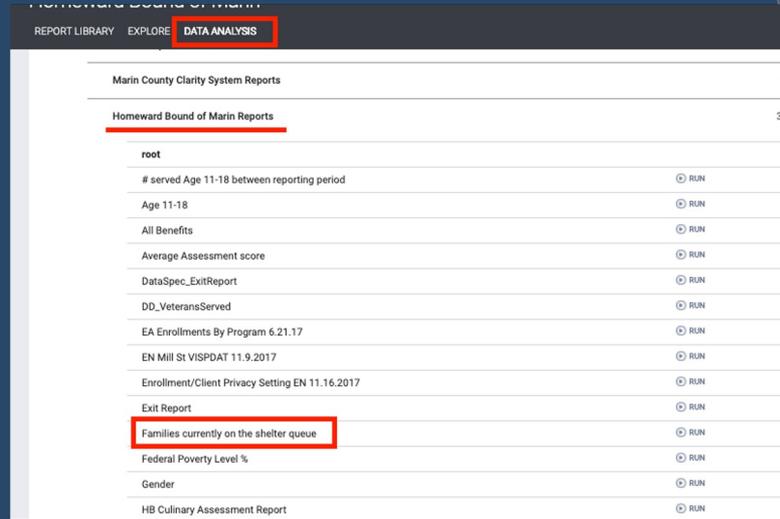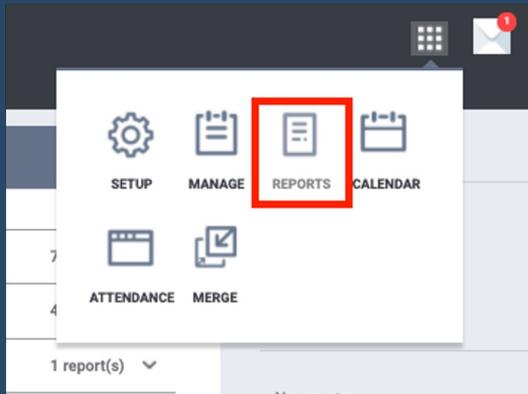
Completing the Family Shelter Screening

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Family Shelter Screening

- All families will be screened using the Family Shelter Screening
- This assessment will be added as a *stand alone* assessment under HBOM
  - It is not added to the Coordinated Entry enrollment
- Navigate to the head of household's profile, click on the *Assessments* tab
- Click *Start* next to the *Family Shelter Screening*

Family Shelter Screening

- Complete the *Family Shelter Assessment*
  - Once the adult/s name/s have been checked against the Megan's Law database, and the toggle is moved, the rest of the assessment will appear.
 - Click *Save* at the bottom when you are done

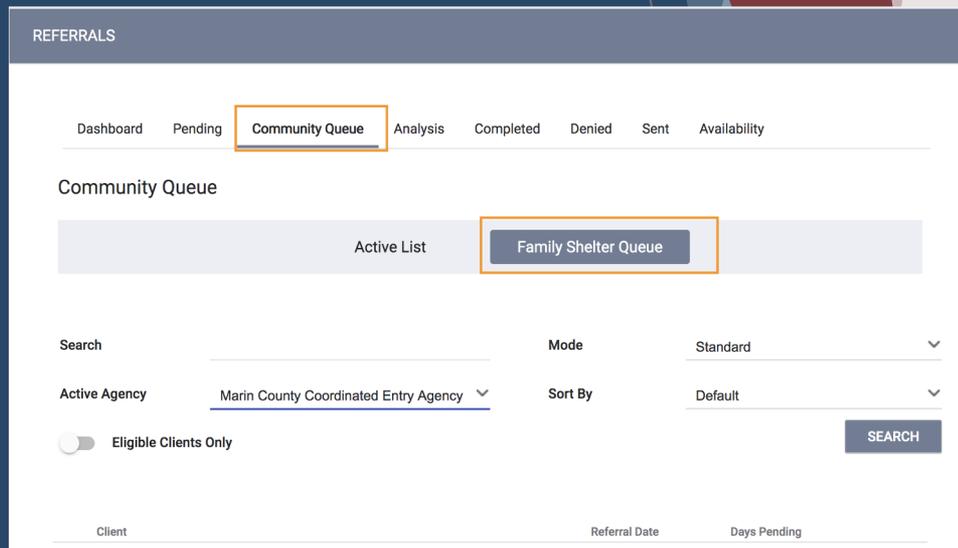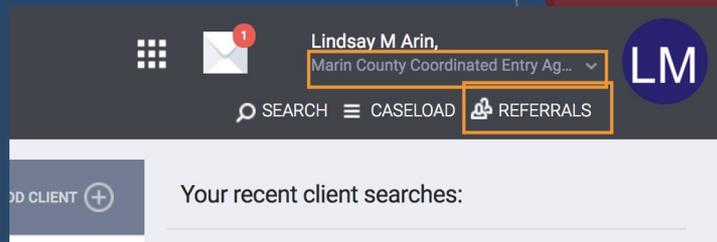# Referring a Client from the Family Shelter Queue

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Family Shelter Queue

- Before Navigating to the Family Shelter Queue, you will need to first switch under the *Marin Coordinated Entry Agency*
- Click on the drop down arrow below your name in the top right corner
- Select *Marin Coordinated Entry Agency* from the list
- You are now ready to go to the *Referrals* tab
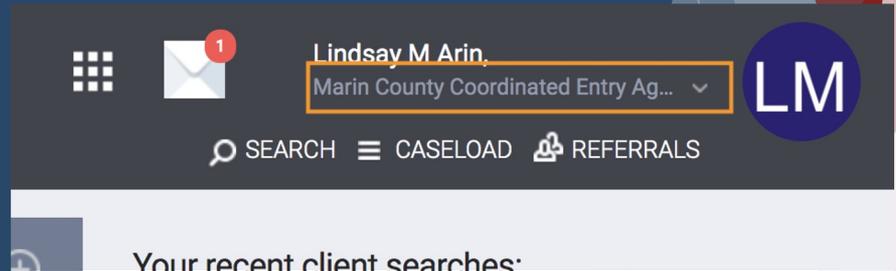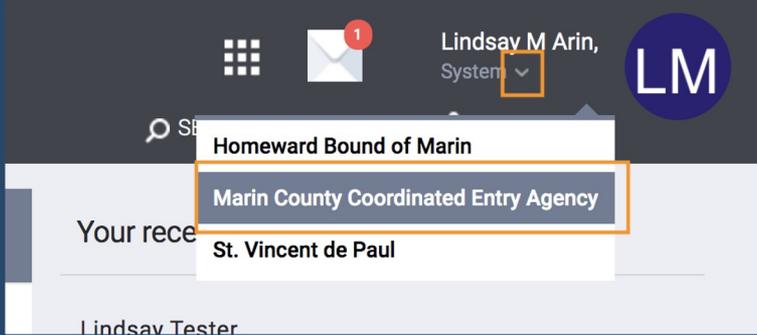
Family Shelter Queue

- Click on the *Referrals Tab*
- Click on the *Community Queue* tab
- The name that is highlighted in blue is the queue that you are viewing. If you're viewing the wrong list, just click on the list you want to be viewing.
- Make sure *Family Shelter Queue* is the one that is highlighted

Family Shelter Queue

- From the *Family Shelter Queue*, you can see a list of families (heads of household) who have been referred for family shelter
    - Search - Client Name, UI, SSN
    - Mode - Assessment Type (e.g. VI-SPDAT Prescreen for Families [V2])
    - Active Agency - the agency you want to send a referral to

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Family Shelter Queue

- From this list, find the client you wish to refer
- Hover your mouse to the left and click the pencil to edit the referral

Family Shelter Queue

- From the referral, scroll down to the *Re-assign* section
- Select the program you wish to refer the client to
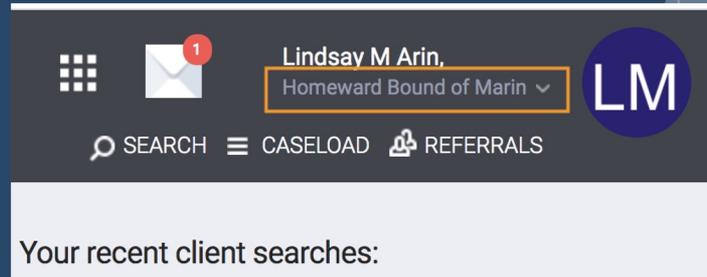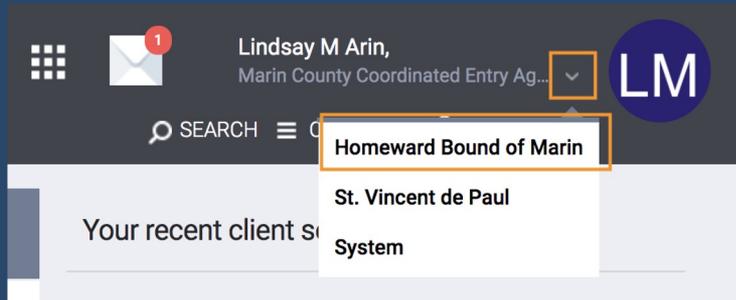- Click *Save Changes*

Processing a Referral

Processing a Referral

- Before processing a referral, you will need to be logged in under *Homeward Bound of Marin*
- If not already logged in under *HBOM*, Click on the drop down arrow below your name in the top right corner
- Select *Homeward Bound of Marin* from the list
- You are now ready to go to process the referral

Processing a Referral

- Navigate to the *Pending* tab by clicking the *Referrals* tab in the top right section under your name
- It will automatically sort the clients by *Days Pending*
  - There are different sort options you can select
  - You can also search for clients by name or UID
  - *White= status hasn't' been changed*
  - *Green= status in pending I/P*

Processing a Referral

- From this list, find the referral you wish to process
- Hover your mouse to the left and click the pencil to edit the referral
- Once inside the referral, scroll down until you see *Status*
  - *Pending In-Process* - these are referrals HBOM is processing
  - *Denied* - referrals HBOM is not accepting

Processing a Referral

- Denials - if HBOM is denying a referral, four additional field will appear
  - *Send to Community Queue* - sends the referral back to the *Family Shelter Queue*
  - *Denied by Type* - Client or Provider
  - *Denial Reason* - List of reasons the referral was denied
  - *Denial Information* - Add additional details regarding the denial

Accepting a Referral

- To accept a referral, client and household will then be enrolled in the family shelter program
  - Click on the client's name to be taken directly to their profile, where you can then enrolled the client and household into the family shelter program

Processing a Referral

- Once at the Head of Household's profile, click the *Programs* tab
- Click on the family shelter program
  - IMPORTANT: Before clicking *Enroll* make sure *Program Placement a result of Referral provided by Marin County Coordinated Entry Agency* is toggled on - this is what will mark the referral as complete and accepted
  - Toggle the slider next to each *Program Group Member* that is enrolling with the head of household

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